

## MEDICAL INVENTORY MANAGEMENT

### **Introduction:**

The Medical Inventory Management System is a comprehensive Salesforce application designed to streamline and manage various operational aspects of the medical inventory. It can efficiently maintain supplier details, manage purchase orders, track product details and transactions, and monitor expiry dates of products, thereby improving operational efficiency, data accuracy, and reporting capabilities.

### **Project Overview:**

This project is a comprehensive Salesforce application to streamline and manage various operational aspects of medical inventory. The system aims to efficiently maintain supplier details, manage purchase orders, track product details and transactions, and monitor the expiry dates of products. Maintain detailed records of suppliers, including contact information. Catalog product information, including descriptions, stock levels. Monitor and track product expiry dates to avoid using expired items. Comprehensive reports to track supplier performance, and purchase orders.

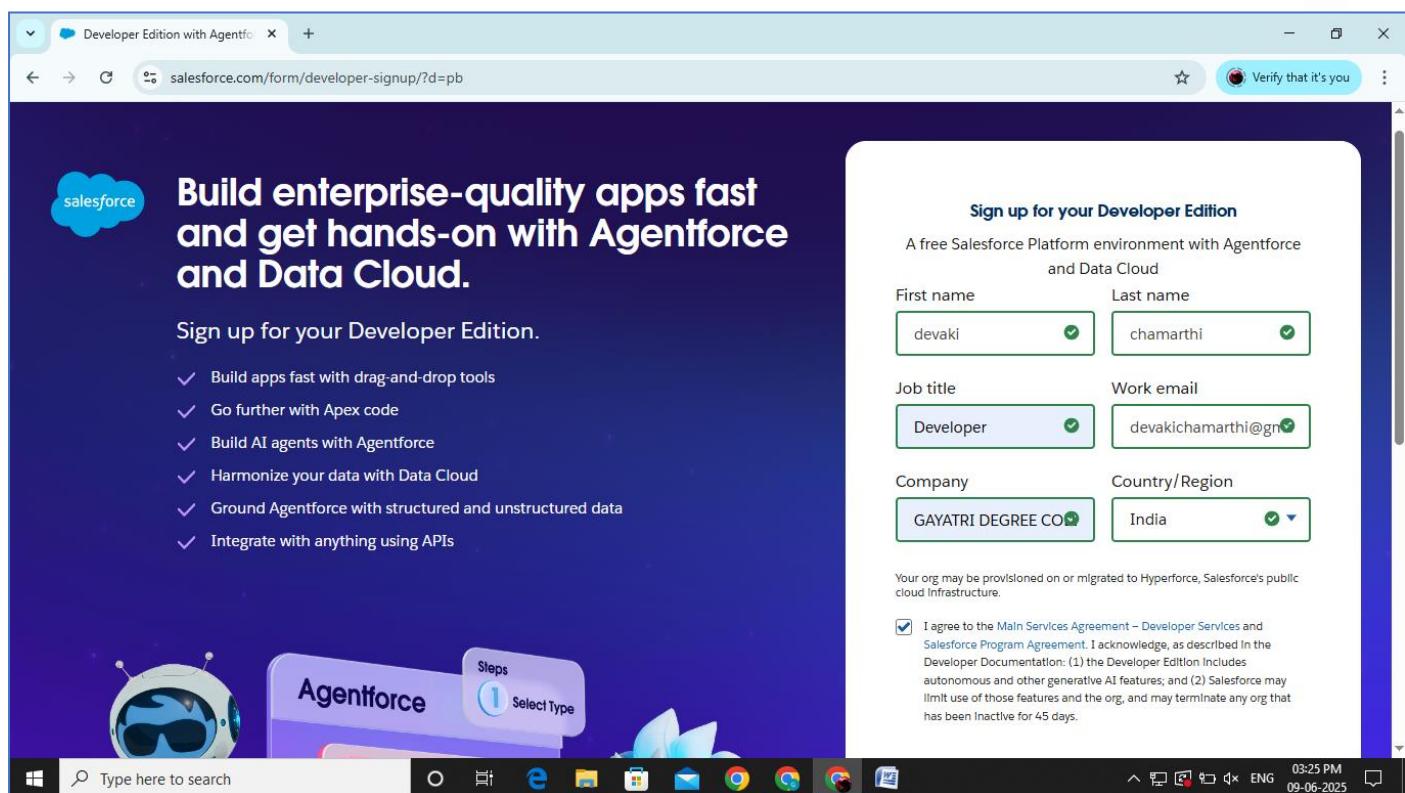
# MEDICAL INVENTORY MANAGEMENT

## Milestone – 1

### Salesforce Account

#### Activity 1: Creating Developer Account

1. Creating a developer org in salesforce.
2. Go to <https://developer.salesforce.com/signup>
3. On the sign up form, enter the following details :
  - First name : DEVAKI
  - Last name : CHAMARTHI
  - Job Title : Developer
  - Work Email : devakichamarthi@gmail.com
  - Company : GAYATRI DEGREE COLLEGE TIRUPATI
  - Country/ Region : INDIA

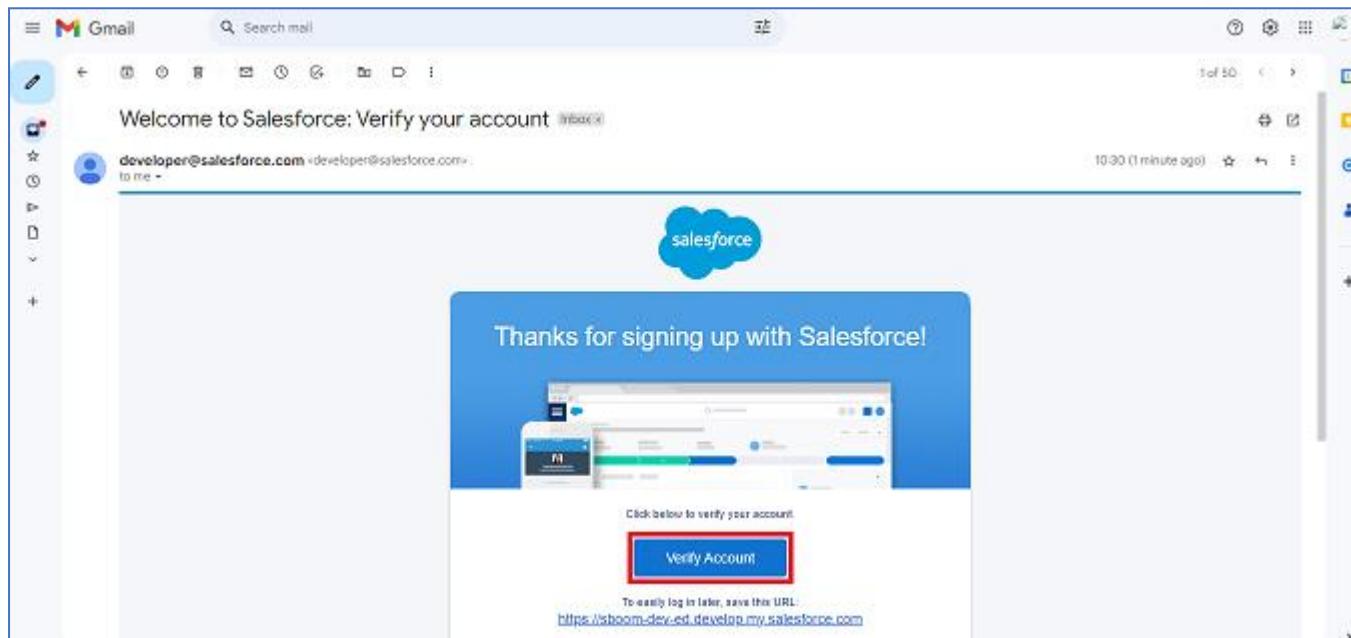


4. Click on sign me up after filling these.

## MEDICAL INVENTORY MANAGEMENT

### Activity 2: Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

A screenshot of a "Change Your Password" page. The title is "Change Your Password". It instructs the user to enter a new password for "lead@sb.com" and lists requirements: "8 characters", "1 letter", and "1 number". A red box highlights the "New Password" field, which contains a masked password and the status "Good". Another red box highlights the "Confirm New Password" field, which also contains a masked password and the status "Match". Below these are fields for "Security Question" (set to "In what city were you born?") and "Answer" (containing "asdfghjkl"). A red box highlights the "Change Password" button at the bottom.

4. Then you will redirect to your salesforce setup page.

## MEDICAL INVENTORY MANAGEMENT

The screenshot shows the Salesforce Setup Home page. At the top, there is a search bar labeled "Search Setup" and a toolbar with various icons. The main content area is titled "SETUP Home". It features three cards:

- Get Started with Einstein Bots**: Launch an AI-powered bot to automate your digital connections. Includes a "Get Started" button.
- Mobile Publisher**: Use the Mobile Publisher to create your own branded mobile app. Includes a "Learn More" button.
- Real-time Collaborative Docs**: Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce. Includes a "Get Started" button.

The left sidebar contains navigation links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (with a "Users" link). A "Create" button is located in the top right corner of the main content area.

# MEDICAL INVENTORY MANAGEMENT

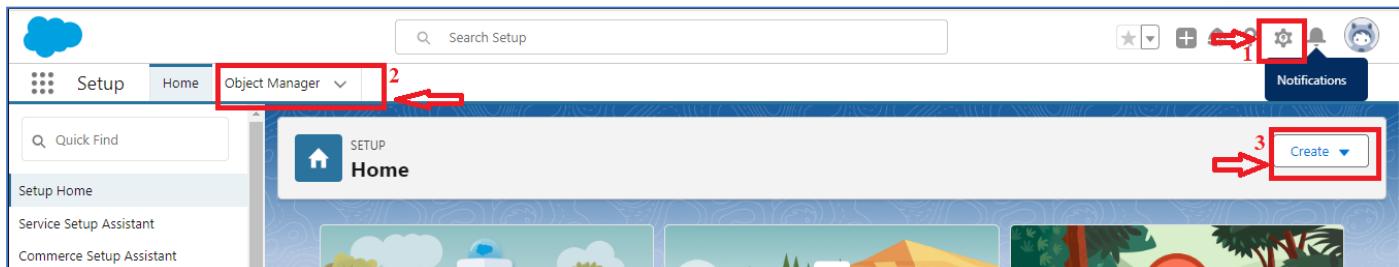
## Milestone 2

### Objects Creation

#### Activity 1: Creating a Product Object

From the setup page

1. Click on Object Manager



2. Click on Create >> Click on Custom Object.

3. Enter the label name as **Product**

4. Enter Plural label name as **Products**

The screenshot shows the 'New Custom Object' setup page. Under 'Custom Object Information', there are fields for 'Label' (Product) and 'Plural Label' (Products), both with examples. A checkbox 'Starts with vowel sound' is present. Below this, the 'Object Name' field is set to 'Product'. There is a 'Description' text area and a 'Context-Sensitive Help Setting' section with two radio button options.

5. Enter Record Name as **Product ID**

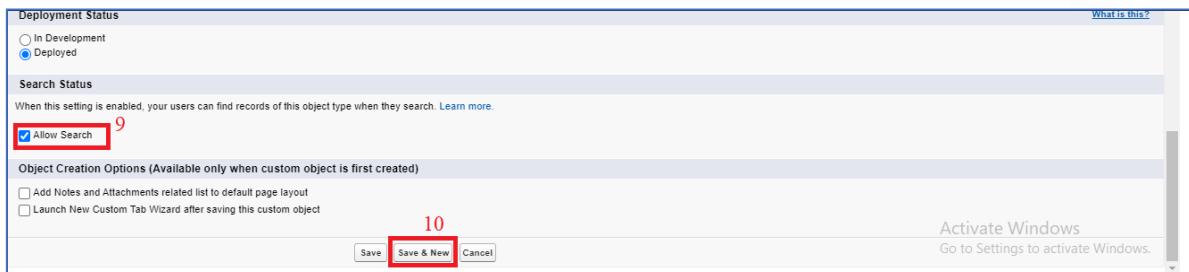
6. Select Data Type as **Text**

7. Select Allow reports.

The screenshot shows the 'Enter Record Name Label and Format' setup page. It includes a note about record names appearing in various contexts. The 'Record Name' field is set to 'Product ID' and the 'Data Type' is 'Text'. In the 'Optional Features' section, the 'Allow Reports' checkbox is checked, while others like 'Allow Activities' and 'Track Field History' are unchecked. A note at the bottom states: 'Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.'

## MEDICAL INVENTORY MANAGEMENT

8. Select Allow search.

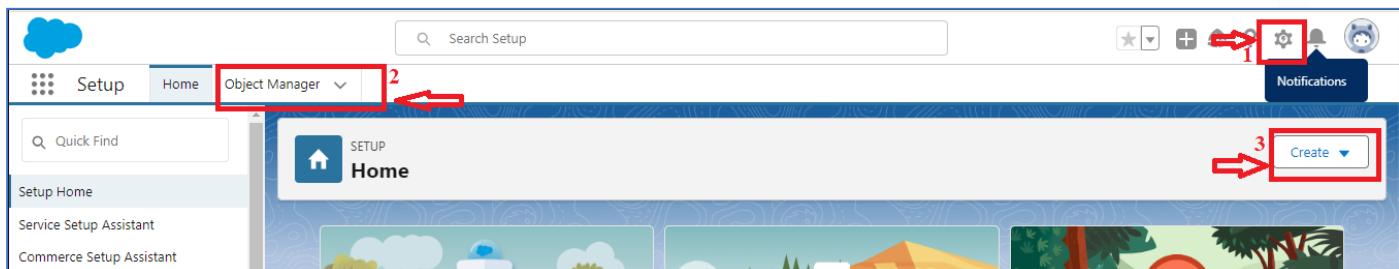


9. Click on Save and New

### Activity 2: Creating a Purchase Order Object

From the setup page

1. Click on Object Manager



2. Click on Create >> Click on Custom Object.

3. Enter the label name as **Purchase Order**

4. Enter Plural label name as **Purchase Orders**

The screenshot shows the 'Edit Custom Object' page for 'Purchase Order'. The title is 'Purchase Order'. The 'Custom Object Definition Edit' section has three buttons: 'Save', 'Save & New' (highlighted with a red box), and 'Cancel'. The 'Custom Object Information' section contains fields for 'Label' (set to 'Purchase Order') and 'Plural Label' (set to 'Purchase Orders'). There is also a checkbox for 'Starts with vowel sound'. Below this, there is a note about the 'Object Name' and its value 'Purchase\_Order'.

5. Enter Record Name as **Purchase Order ID**

6. Select Data Type as **Text**

7. Select Allow reports.

## MEDICAL INVENTORY MANAGEMENT

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

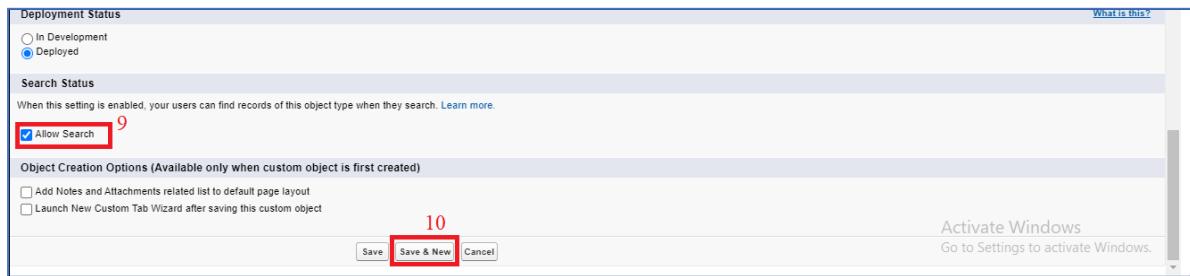
Record Name: Purchase Order ID Example: Account Name

Data Type: Text Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

Allow Reports  
 Allow Activities

### 8. Select Allow search.

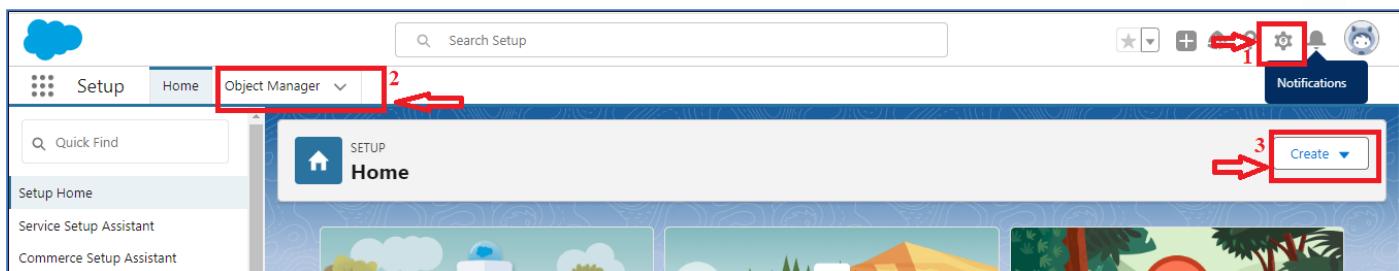


### 9. Click on Save and New

## Activity 3: Creating a Order Item Object

From the setup page

### 1. Click on Object Manager



### 2. Click on Create >> Click on Custom Object.

### 3. Enter the label name as **Order Item**

### 4. Enter Plural label name as **Order Items**

# MEDICAL INVENTORY MANAGEMENT

Edit Custom Object  
Order Item

Help for this Page

## Custom Object Definition Edit

### Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.  
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label  Example: Account

Plural Label  Example: Accounts

Starts with vowel sound

The Object Name is used when referencing the object via the API.

Object Name  Example: Account

Required Information

## 5. Enter Record Name as Order Item ID

## 6. Select Data Type as Text

## 7. Select Allow reports.

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name	<input type="text" value="Order Item ID"/> Example: Account Name
Data Type	<input type="text" value="Text"/> <small>Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.</small>

**Optional Features**

- Allow Reports
- Allow Activities
- Track Field History

## 8. Select Allow search.

**Deployment Status**

- In Development
- Deployed

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#)

Allow Search

**Object Creation Options (Available only when custom object is first created)**

- Add Notes and Attachments related list to default page layout
- Launch New Custom Tab Wizard after saving this custom object

**Save Save & New Cancel**

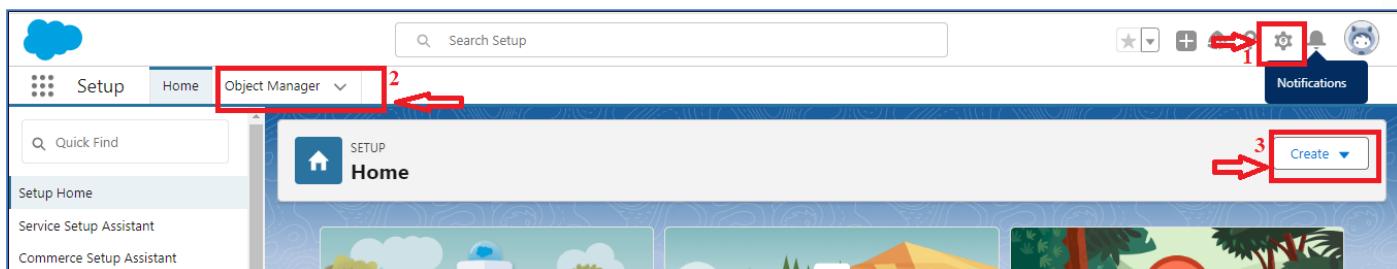
**Activate Windows**  
Go to Settings to activate Windows.

## 9. Click on Save and New

## Activity 4: Creating a Inventory Transaction Object

From the setup page

## 1. Click on Object Manager



# MEDICAL INVENTORY MANAGEMENT

2. Click on Create >> Click on Custom Object.
3. Enter the label name as **Inventory Transaction**
4. Enter Plural label name as **Inventory Transactions**

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.  
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label:  Example: Account

Plural Label:  Example: Accounts

Starts with vowel sound:

The Object Name is used when referencing the object via the API.

Object Name:  Example: Account

5. Enter Record Name as **Transaction ID**
6. Select Data Type as **Text**
7. Select Allow reports.

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name:  Example: Account Name

Data Type:  Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

Allow Reports  
 Allow Activities  
 Track Field History  
 Allow in Chatter Groups  
 Enable Licensing

8. Select Allow search.

Deployment Status

In Development  
 Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout  
 Launch New Custom Tab Wizard after saving this custom object

Save  Cancel

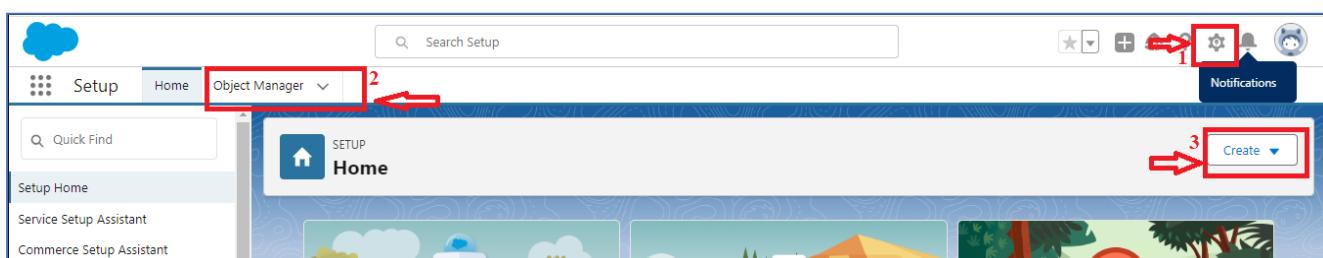
Activate Windows  
Go to Settings to activate Windows.

9. Click on Save and New

## Activity 5: Creating a Supplier Object

From the setup page

1. Click on Object Manager



## MEDICAL INVENTORY MANAGEMENT

2. Click on Create >> Click on Custom Object.
3. Enter the label name as **Supplier**
4. Enter Plural label name as **Suppliers**

**Edit Custom Object**  
Supplier

Custom Object Definition Edit      Save    Save & New    Cancel

**Custom Object Information**

The singular and plural labels are used in tabs, page layouts, and reports.  
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label	Supplier	Example: Account
Plural Label	Suppliers	Example: Accounts

Help for this Page ?

5. Enter Record Name as **Supplier ID**
6. Select Data Type as **Text**
7. Select Allow reports.

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name	Supplier ID	Example: Account Name
-------------	-------------	-----------------------

Data Type    Text    Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

**Optional Features**

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing

8. Select Allow search.

**Deployment Status**

In Development   Deployed

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. Learn more.

Allow Search

**Object Creation Options (Available only when custom object is first created)**

Add Notes and Attachments related list to default page layout  
 Launch New Custom Tab Wizard after saving this custom object

Activate Windows  
Go to Settings to activate Windows.

Save   **Save & New**   Cancel

9. Click on Save and New

### Output:

Label	API Name	Type	Description	Last Modified	Deployed
Supplier	Supplier_c	Custom Object		6/1/2025	✓
Inventory Transaction	Inventory_Transaction_c	Custom Object		6/1/2025	✓
Order Item	Order_Item_c	Custom Object		6/1/2025	✓
Purchase Order	Purchase_Order_c	Custom Object		6/1/2025	✓
Product	Product_c	Custom Object		5/30/2025	✓

# MEDICAL INVENTORY MANAGEMENT

## Milestone -3

### Tabs Creation

#### Activity 1: Creating a tab for Product Object

1. Go to the setup page >> type Tabs in Quick Find bar
2. Click on tabs
3. Click on New (under custom object tab).

The screenshot shows the Salesforce Setup interface. In the top left, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below it is a sidebar with sections like 'Feature Settings', 'Analytics', 'Tableau', 'Tableau Embedding', 'User Interface' (which has 'Loaded Console Tab Limit' and 'Rename Tabs and Labels' under it), and 'Tabs'. A red box labeled '1' is around the search bar where 'tab' is typed. Another red box labeled '2' is around the 'Tabs' link in the sidebar. The main content area is titled 'Custom Tabs' and contains sections for 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. Each section has a 'New' button and a 'What Is This?' link. A red box labeled '3' is around the 'New' button in the 'Custom Object Tabs' section. At the bottom right of the main content area, there's a link 'Activate Windows'.

4. Select Object(Product) >> Select the tab style

The screenshot shows the 'Step 1. Enter the Details' page for creating a new tab. The title bar says 'SETUP Tabs Step 1 of 3'. The page asks to choose a custom object for the tab. It has a dropdown 'Object' set to 'Product' and a 'Tab Style' dropdown set to 'Stethoscope'. There's also an optional field for a 'Splash Page Custom Link' which is set to '--None--'. Below that is a 'Description' field with a large empty text area. At the bottom right, there's a 'Next' button with a red box around it and a 'Cancel' link.

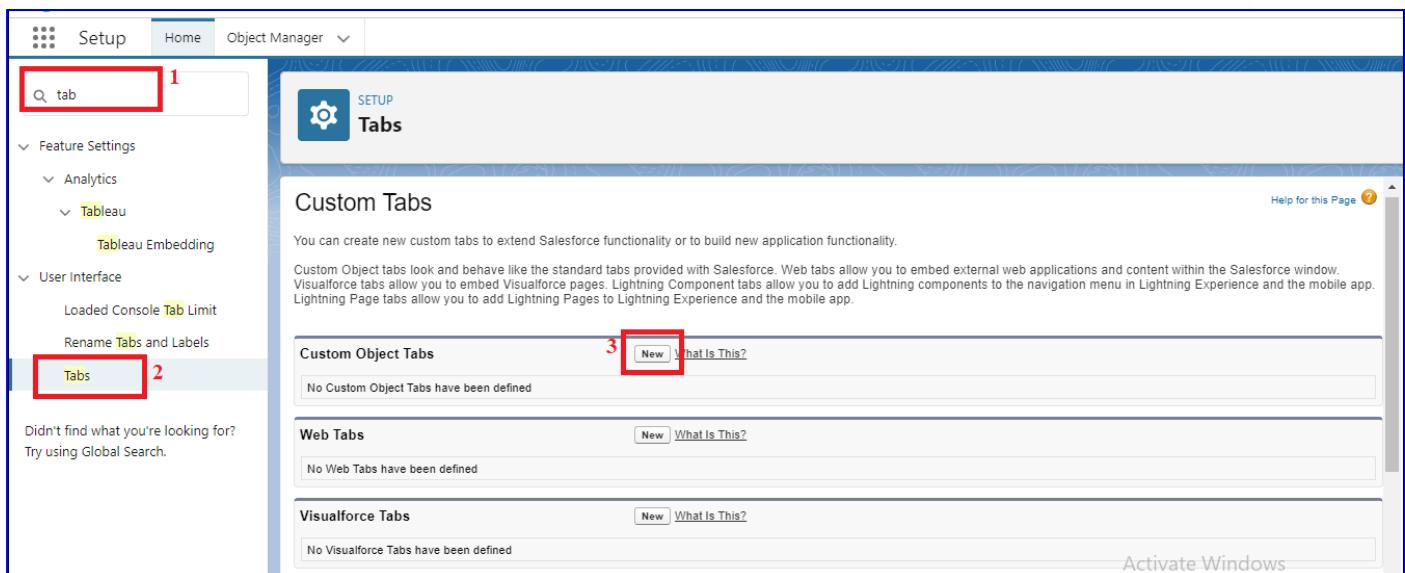
5. Click on Next >> (Add to profiles page) keep it as default >> Click on Next (Add to Custom App) uncheck the include tab .
6. Make sure that the Append tab to user's existing personal customizations is checked.

## MEDICAL INVENTORY MANAGEMENT

7. Click save.

### Activity 2: Creating a tab for Purchase Order Object

1. Go to the setup page >> type Tabs in Quick Find bar
2. Click on tabs
3. Click on New (under custom object tab).



4. Select Object(Purchase Order) >> Select the tab style

Custom Object Tab Information	
Tab Label	Purchase Orders
Object	<u>Purchase Order</u>
Tab Style	Laptop

5. Click on Next >> (Add to profiles page) keep it as default >> Click on Next (Add to Custom App) uncheck the include tab .
6. Make sure that the Append tab to user's existing personal customizations is checked.
7. Click save.

### Activity 3: Creating a tab for Order Item Object

1. Go to the setup page >> type Tabs in Quick Find bar
2. Click on tabs
3. Click on New (under custom object tab).

# MEDICAL INVENTORY MANAGEMENT

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

**Custom Object Tabs**

No Custom Object Tabs have been defined

**Web Tabs**

No Web Tabs have been defined

**Visualforce Tabs**

No Visualforce Tabs have been defined

Activate Windows

4. Select Object(Order Item) >> Select the tab style

## Custom Object Tab Information

Tab Label	Order Items
Object	<u>Order Item</u>
Tab Style	Credit card

5.Click on Next >> (Add to profiles page) keep it as default >> Click on Next (Add to Custom App) uncheck the include tab .

6.Make sure that the Append tab to user's existing personal customizations is checked.

7.Click save.

## Activity 4: Creating a tab for Inventory Transaction Object

1. Go to the setup page >> type Tabs in Quick Find bar

2. Click on tabs

3. Click on New (under custom object tab).

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

**Custom Object Tabs**

No Custom Object Tabs have been defined

**Web Tabs**

No Web Tabs have been defined

**Visualforce Tabs**

No Visualforce Tabs have been defined

Activate Windows

## MEDICAL INVENTORY MANAGEMENT

4. Select Object(Inventory Transaction) >> Select the tab style

**Custom Object Tab Information**

Tab Label	Inventory Transactions
Object	<u>Inventory Transaction</u>
Tab Style	Gears

5.Click on Next >> (Add to profiles page) keep it as default >> Click on Next (Add to Custom App) uncheck the include tab .

6.Make sure that the Append tab to user's existing personal customizations is checked.

7.Click save.

### Activity 5: Creating a tab for Supplier Object

1. Go to the setup page >> type Tabs in Quick Find bar

2. Click on tabs

3. Click on New (under custom object tab).

4. Select Object(Supplier) >> Select the tab style

**Custom Object Tab Information**

Tab Label	Suppliers
Object	<u>Supplier</u>
Tab Style	Car

5.Click on Next >> (Add to profiles page) keep it as default >> Click on Next (Add to Custom App) uncheck the include tab .

6.Make sure that the Append tab to user's existing personal customizations is checked.

7.Click save.

# MEDICAL INVENTORY MANAGEMENT

## Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content in Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

Custom Object Tabs		<a href="#">New</a>	<a href="#">What Is This?</a>
Action	Label	Tab Style	
Edit   Del	<a href="#">Inventory Transactions</a>		Gears
Edit   Del	<a href="#">Order Items</a>		Credit card
Edit   Del	<a href="#">Products</a>		Computer
Edit   Del	<a href="#">Purchase Orders</a>		Laptop
Edit   Del	<a href="#">Suppliers</a>		Car

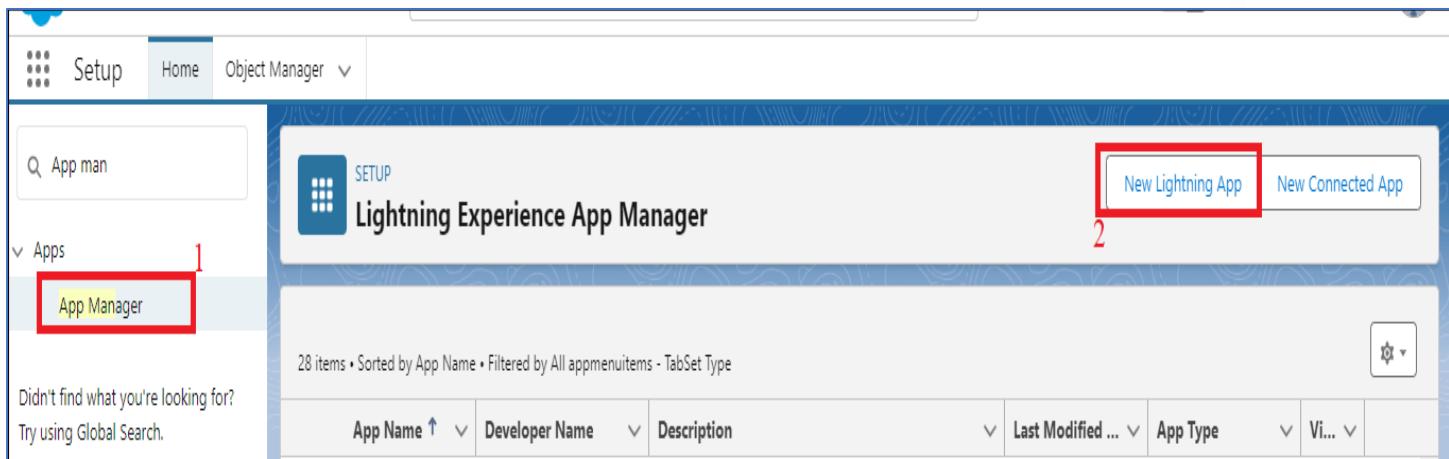
# MEDICAL INVENTORY MANAGEMENT

## Milestone-4

### The Lightning app creation

#### Activity 1: Create a Lightning App for Medical Inventory Management

1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.



3. Enter Medical Inventory Management as the App Name >> Click on upload image and add an image related to Medical Inventory then click next

A screenshot of the 'New Lightning App' configuration page. The title is 'New Lightning App'. The 'App Details' section contains fields for 'App Name' (Medical Inventory Management) and 'Developer Name' (Medical\_Inventory\_Management). The 'App Branding' section includes an 'Image' placeholder with a blue cross icon, a 'Primary Color Hex' field set to #0070D2, and a 'Clear' button. Below these are 'Org Theme Options' checkboxes for 'Use the app's image and color instead of the org's'. At the bottom right is a 'Next' button.

4. Under App Options, leave the default selections and click next.
5. Under Utility Items, leave as is and click Next.

## MEDICAL INVENTORY MANAGEMENT

6. From Available Items, select Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards and move them to Selected Item and Click Next.

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items	Selected Items
Dash	Products
Dashboards	Purchase Orders
	Order Items
	Inventory Transactions
	Suppliers
	Reports

7. From Available Profiles, select System Administrator and move it to Selected Profiles.

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles	Selected Profiles
system	
System Administrator	

Back

Save & Finish

8. Click Save & Finish.

# MEDICAL INVENTORY MANAGEMENT

## Milestone-5

### Fields creation

#### Creating Fields in Product Object:

Object	Field Name	Data Type
Product	Product ID(Standard)	Text
	Product Name	Text
	Product Description	Text Area
	Minimum Stock Level	Number(18, 0)
	Current Stock Level	Number(18, 0)
	Unit Price	Currency(16, 2)
	Expiry Date	Date

#### Activity 1: Creating a Text Field in Product Object

To create fields in an object:

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Product custom object.

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup' and 'Object Manager' tabs. The 'Object Manager' tab is highlighted with a red box and has a red number '2' above it. Below the navigation is a search bar with 'Product' and a 'Create' button. The main area is titled 'Object Manager' and shows a table of objects. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. A red box highlights the 'Product' row in the table, which corresponds to the 'Product\_c' API name and is listed as a 'Custom Object'. The last modified date is 18/06/2024.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Fulfillment Order Product	FulfillmentOrderLineItem	Standard Object			
Opportunity Product	OpportunityLineItem	Standard Object			
Order Product	OrderItem	Standard Object			
Product	Product_c	Custom Object		18/06/2024	✓
Product	Product2	Standard Object			
Product Attribute	ProductAttribute	Standard Object			

4. Select Fields & Relationships from the left navigation
5. Click on New

# MEDICAL INVENTORY MANAGEMENT

SETUP > OBJECT MANAGER  
Product

**Fields & Relationships**  
4 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Product ID	Name	Text(80)		✓

Details 4  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts

New Deleted Fields Field Dependencies Set History Tracking

## 6. Select Text field, click Next

clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text 6
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) *i*
- Time
- URL

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.  
Allows users to enter any number. Leading zeros are removed.  
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.  
Allows users to enter any phone number. Automatically formats it as a phone number.  
Allows users to select a value from a list you define.  
Allows users to select multiple values from a list you define.  
Allows users to enter any combination of letters and numbers.  
Allows users to enter up to 255 characters on separate lines.  
Allows users to enter up to 131,072 characters on separate lines.  
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.  
Allows users to enter any combination of letters and numbers and store them in encrypted form.  
Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.  
Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

## 7. Enter Field Label as "Product Name" and Length 255.

## 8. Select Required Field.

## MEDICAL INVENTORY MANAGEMENT

Step 2. Enter the details Step 2 of 4

Field Label  7

Please enter the maximum length for a text field below.

Length  9

Field Name  7

Description

Help Text

**Required**  Always require a value in this field in order to save a record 8

**Unique**  Do not allow duplicate values  
 Treat "ABC" and "abc" as duplicate values (case insensitive)  
 Treat "ABC" and "abc" as different values (case sensitive)

External ID  Set this field as the unique record identifier from an external system

Auto add to custom report type  Add this field to existing custom report types that contain this entity 9

- Click Next, Next, then Save & New.

### Activity 2: Creating a Text Area Field in Product Object

To create fields in an object:

- Click the gear icon and select Setup. This launches Setup in a new tab.
- Click the Object Manager tab next to Home.
- Select Product custom object.
- Select Fields & Relationships from the left navigation
- Click on New
- Select TextArea field, click Next

clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

**Text Area** 6

**Text Area (Long)**

**Text Area (Rich)**

**Text (Encrypted)**

**Time**

**URL**

Next Cancel

- Enter Field Label as "Product Description".

# MEDICAL INVENTORY MANAGEMENT

Step 2. Enter the details Step 2 of 4

Previous  Next  Cancel

Field Label	<input type="text" value="Product Description"/> <small>i</small>	7	8
Field Name	<input type="text" value="Product_Description"/> <small>i</small>		
Description	<input type="text"/>		
Help Text	<input type="text"/>		
Required	<input type="checkbox"/> Always require a value in this field in order to save a record		
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity <small>i</small>		
Default Value	<input type="text" value="Show Formula Editor"/> <small>Use formula syntax. Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \${CustomMetadata.Type__mdt}RecordAPIName.Field__c</small>		

- Click Next, Next, then Save & New.

## Activity 3: Creating a Number Field in Product object

To create fields in an object:

- Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product custom object.
- Now click on "Fields & Relationships"
- Click on New.
- Select Data type as "Number" and click Next.
- Enter Field Label as " Minimum Stock Level".
- Length - 18, Decimal Places - 0.

Edit Product Custom Field  
Minimum Stock Level

Custom Field Definition Edit

**Field Information**

Field Label	<input type="text" value="Minimum Stock Level"/>	Data Type	Number
Field Name	<input type="text" value="Minimum_Stock_Level"/>		

**Number Options**

Length	<input type="text" value="18"/>
Decimal Places	<input type="text" value="0"/>

- Click on Next, Next and Save.

## Activity 4: Creating a Number Field in Product object

## MEDICAL INVENTORY MANAGEMENT

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product custom object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Number" and click Next.
5. Enter Field Label as " Current Stock Level".
6. Length - 18, Decimal Places - 0.

Step 2. Enter the details Step 2 of 4

Field Label: Current Stock Level 5

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length: 18 6 Decimal Places: 0

Field Name: Current\_Stock\_Level 7

Description:

Help Text:

Required:  Always require a value in this field in order to save a record

Unique:  Do not allow duplicate values

External ID:  Set this field as the unique record identifier from an external system

7. Click on Next, Next and Save.

### Activity 5: Creating a Currency Field in Product object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product custom object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Currency" and click Next.
5. Enter Field Label as " Unit Price".
6. Length - 16, Decimal Places - 2.
7. Select Required Field.

# MEDICAL INVENTORY MANAGEMENT

Step 2. Enter the details Step 2 of 4

Field Label  5

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length  6 Decimal Places  8

Number of digits to the left of the decimal point  
Field Name  9 Number of digits to the right of the decimal point

Description

Help Text

Required  Always require a value in this field in order to save a record 7

Auto add to custom report type  Add this field to existing custom report types that contain this entity 10

8. Click on Next, Next and Save.

## Activity 6: Creating Date field in Product Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product custom object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Date” and click Next.

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Product

Details

**Fields & Relationships**

- External Lookup Relationship
- Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- Checkbox
- Allows users to select a True (checked) or False (unchecked) value.
- Currency
- Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date
- Allows users to enter a date or pick a date from a popup calendar.
- Date/Time
- Allows users to enter date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Email
- Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Geolocation
- Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Number
- Allows users to enter any number. Leading zeros are removed.
- Percent
- Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
- Phone
- Allows users to enter any phone number. Automatically formats it as a phone number.
- Picklist
- Allows users to select a value from a list you define.
- Picklist (Multi-Select)
- Allows users to select multiple values from a list you define.
- Text
- Allows users to enter any combination of letters and numbers.

Type here to search

10:08 AM 03-06-2025 ENG

## MEDICAL INVENTORY MANAGEMENT

5. Enter Field Label as "Expiry Date".

Product  
New Custom Field

Step 2 of 4

Field Label: Expiry Date

Field Name: Expiry\_Date

Description:

Help Text:

Required:  Always require a value in this field in order to save a record

Auto add to custom report type:  Add this field to existing custom report types that contain this entity

6. Click on Next, Next and Save.

### **Creating Fields in Purchase Order Object:**

Purchase Order	Purchase Order ID(Standard)	Text
	Supplier ID	Lookup(Supplier)
	Order Date	Date
	Expected Delivery Date	Date
	Actual Delivery Date	Date
	Order Count	Roll-Up Summary (COUNT Order Item)
	Total Order Cost	Currency(16, 2)

### **Activity 1 : Creating Lookup Relationship in Purchase Order Object**

A Lookup relationship is a type of relationship in Salesforce that connects two objects together based on a field known as the Lookup field. It establishes a relationship between a child object and a parent object, allowing the child object to reference the parent object.

To Create a relationship from Purchase Order to Supplier .

1. Go to the Setup page >> click on Object manager >> type object name(Purchase Order) in the quick find bar >> click on the Purchase Order object.
2. Click on Fields & Relationship
3. Click on New.
4. Select "Lookup relationship" as data type and click Next.

# MEDICAL INVENTORY MANAGEMENT

Specify the type of information that the custom field will contain.

**Data Type**

Select one of the data types below.

- None Selected
- Auto Number
- Formula
- Roll-Up Summary i
- Lookup Relationship 4
- Master-Detail Relationship
- External Lookup Relationship

**Lookup Relationship** Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

**Master-Detail Relationship** Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

**External Lookup Relationship** Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

**Next** **Cancel**

## 5. Select the related object “Supplier”.

Purchase Order  
New Relationship

Help for this Page i

**Step 2. Choose the related object**

Step 2

Select the other object to which this object is related.

**Related To**  5

**Next** **Cancel**

**6**

**Previous** **Next** **Cancel**

## 6. Click on Next.

## 7. Give Field Label as “Supplier ID” .

## 8. Select Required Field.

Field Label  7

Field Name  9

Description

Help Text

Child Relationship Name  8

Required  Always require a value in this field in order to save a record  Clear the value of this field. You can't choose this option if you make this field required.

What to do if the lookup record is deleted?  Don't allow deletion of the lookup record that's part of a lookup relationship.  Add this field to existing custom report types that contain this entity i

**Previous** **Next** **Cancel**

## MEDICAL INVENTORY MANAGEMENT

9. Click on Next , Next , Next , Save.

### Activity 2: Creating a Date Field in Purchase Order object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box>> click on the Purchase Order object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Date" and click Next.
5. Enter Field Label as " Order Date".

Step 2. Enter the details Step 2 of 4

Field Label: Order Date 5

Field Name: Order\_Date

Description:

Help Text:

Required:  Always require a value in this field in order to save a record

Auto add to custom report type:  Add this field to existing custom report types that contain this entity i

Default Value: Show Formula Editor

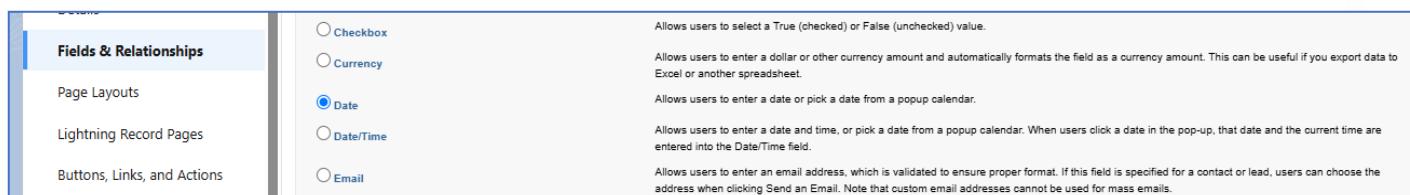
Use formula syntax: Enclose text and picklist value API names in double quotes : ("the\_text"), include numbers without quotes : (25), show percentages as decimals : (0.10), and express date calculations in the standard format : (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type\_\_mdt.RecordAPIName.Field\_\_c

6. Click on Next, Next and Save.

### Activity 3: Creating a Date Field in Purchase Order object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box>> click on the Purchase Order object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Date" and click Next.



## MEDICAL INVENTORY MANAGEMENT

5. Enter field label as "Expected Delivery Date".

Field Label: Expected Delivery Date

Field Name: Expected\_Delivery\_Date

Description:

Help Text:

Required:  Always require a value in this field in order to save a record  
 Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

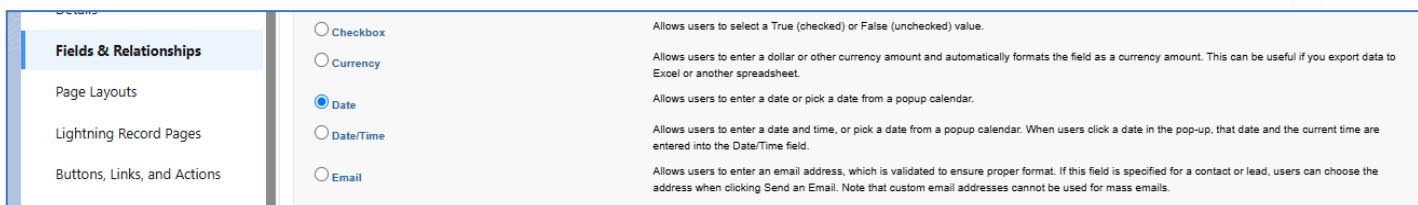
Use formula syntax: Enclose text and picklist values API names in double quotes : ("the\_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \${CustomMetadata.Type\_\_mdt:RecordAPIName.Field\_\_c}

6. Click on Next, Next and Save.

### Activity 4: Creating a Date Field in Purchase Order object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box>> click on the Purchase Order object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Date" and click Next.



5. Enter field label as "Actual Delivery Date".

SETUP > OBJECT MANAGER  
**Purchase Order**

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Label: Actual Delivery Date

Field Name: Actual\_Delivery\_Date

Description:

Help Text:

6. Click on Next, Next and Save.

# MEDICAL INVENTORY MANAGEMENT

## Activity 5: Creating a Roll-Up Summary Field in Purchase Order object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box>> click on the Purchase Order object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Roll-Up Summary" and click Next.

**Data Type**

Select one of the data types below.

None Selected

Auto Number  
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula  
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary 4  
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

5. Enter Field Label as " Order Count".

Purchase Order  
New Custom Field

Help for this Page

Step 2. Enter the details Step 2 of 5

Field Label  5

Field Name

Description

Help Text

Auto add to custom report type  Add this field to existing custom report types that contain this entity

Previous Next Cancel

6. Choose the Summarized Object as "Order Items".

7. For Select Roll-Up Type select "Count".

Purchase Order  
New Custom Field

Help for this Page

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize

Master Object   
Summarized Object  6

Required Information

Select Roll-Up Type

COUNT 7  
 SUM  
 MIN  
 MAX

Field to Aggregate

## MEDICAL INVENTORY MANAGEMENT

8. Click on Next, Next and Save.

### Activity 6: Creating a Currency Field in Product object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product custom object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Currency" and click Next.
5. Enter Field Label as "Total Order Cost".
6. Length - 16, Decimal Places - 2.
7. Select Required Field.

The screenshot shows the 'Purchase Order' object in the Object Manager. A new custom field is being created, labeled 'Total Order Cost'. The field is set to 'Currency' type, with a length of 16 and 2 decimal places. The field name is 'Total\_Order\_Cost'. The 'Required' checkbox is checked. The 'Step 2 of 4' progress bar indicates the current step.

8. Click on Next, Next and Save.

### Creating Fields in Order Item Object :

Order Item	Order Item ID(Standard)	Text
	Product ID	Lookup(Product)
	Purchase Order ID	Master-Detail(Purchase Order)
	Quantity Ordered	Number(18, 0)
	Quantity Received	Number(18, 0)
	Unit Price	Formula(Currency)
	Amount	Formula(Currency)

## MEDICAL INVENTORY MANAGEMENT

### Activity 1 : Creating Lookup Relationship in Order Item Object

A Lookup relationship is a type of relationship in Salesforce that connects two objects together based on a field known as the Lookup field. It establishes a relationship between a child object and a parent object, allowing the child object to reference the parent object.

To Create a relationship from Order Item to Product .

1. Go to the Setup page >> click on Object manager >> type object name (Order Item) in the quick find bar >> click on the Order Item object.
2. Click on Fields & Relationship
3. Click on New.
4. Select “Lookup relationship” as data type and click Next.

Specify the type of information that the custom field will contain.

**Data Type**

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

**Lookup Relationship** Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

5. Select the related object “ Product”.

SETUP > OBJECT MANAGER  
**Order Item**

Details  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets

Order Item  
New Relationship  
Step 2. Choose the related object

Select the other object to which this object is related.

Related To **Product**

Help for this Page

Step 2  
Previous Next Cancel

6. Click on Next.

## MEDICAL INVENTORY MANAGEMENT

7. Give Field Label as "Product ID".
8. Select Required Field

SETUP > OBJECT MANAGER  
Order Item

**Fields & Relationships**

New Relationship

Step 3. Enter the label and name for the lookup field

Field Label: Product ID

Field Name: Product\_ID

Description:

Help Text:

Child Relationship Name: Order\_Items

Step 3 of 6

Previous Next Cancel

9. Click on Next, Next and Save.

### Activity 2 : Creating Master-detail Relationship in Order Item Object

1. Go to the Setup page >> click on Object manager >> type object name(Order Item) in the quick find bar >> click on the Order Item object.
2. Click on Fields & Relationship
3. Click on New.
4. Select "Master-detail relationship" as data type and click Next.

**Data Type**

Select one of the data types below.

- None Selected
- Auto Number
- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

 The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

5. Select the related object "Purchase Order".
6. Click on Next.
7. Give Field Label as "Purchase Order ID".
8. Select Required Field
9. Click on Next, Next and Save.

## MEDICAL INVENTORY MANAGEMENT

### Activity 3: Creating a Number Field in Order Item object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item custom object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Number" and click Next.
5. Enter Field Label as "Quantity Ordered".
6. Length - 18, Decimal Places - 0.

The screenshot shows the 'Object Manager' interface for the 'Order Item' object. On the left, a sidebar lists various customization options: Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main area is titled 'New Custom Field' and 'Step 2. Enter the details'. It includes fields for 'Field Label' (Quantity Ordered), 'Length' (18), 'Decimal Places' (0), 'Field Name' (Quantity\_Ordered), and a 'Description' field. A note at the top right says: 'Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".' Navigation buttons at the bottom right include 'Previous', 'Next', and 'Cancel'.

7. Click on Next, Next and Save.

### Activity 4: Creating a Number Field in Order Item object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item custom object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Number" and click Next.
5. Enter Field Label as "Quantity Received".
6. Length - 18, Decimal Places - 0.

# MEDICAL INVENTORY MANAGEMENT

SETUP > OBJECT MANAGER  
Order Item

Details  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts

Order Item  
New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: Quantity Received Quantity Received

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length: 18 Number of digits to the left of the decimal point  
Field Name: Quantity\_Received Number of digits to the right of the decimal point  
Description:   
Help Text:

Previous Next Cancel

- Click on Next, Next and Save

## Activity 5: Creating a Unit Price Formula Field in Order Item object

To create fields in an object:

- Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item object.
- Now click on “Fields & Relationships”
- Click on New.
- Select Data type as “Formula” and click Next.
- Enter field label Unit Price.
- Select formula return type Currency, Click Next

Step 2. Choose output type Step 2 of 5

Field Label: Unit Price Unit Price 5 Field Name: Unit\_Price Unit\_Price

Auto add to custom report type  Add this field to existing custom report types that contain this entity i

Formula Return Type

None Selected Select one of the data types below.

Checkbox Calculate a boolean value  
Example: `TODAY() > CloseDate`

Currency Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.  
Example: `Gross Margin = Amount - Cost_c`

Date Calculate a date, for example, by adding or subtracting days to other dates.  
Example: `Reminder Date = CloseDate - 7`

Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.  
Example: `Next = NOW() + 1`

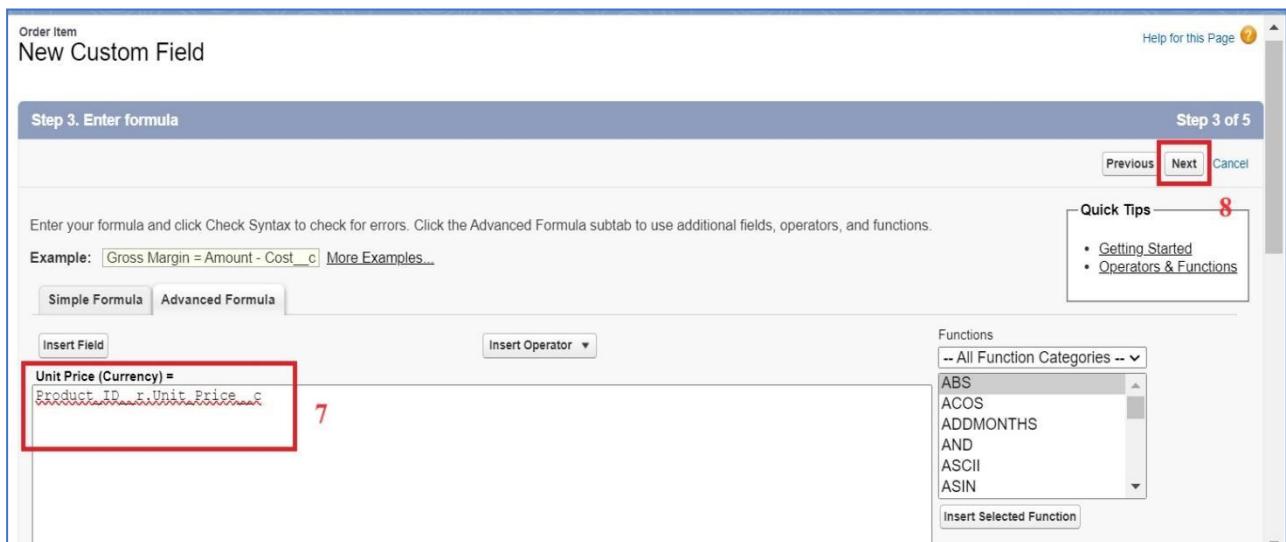
Number Calculate a numeric value.  
Example: `Fahrenheit = 1.8 * Celsius_c + 32`

Percent Calculate a percent and automatically add the percent sign to the number

Previous Next Cancel

## MEDICAL INVENTORY MANAGEMENT

7. Create and insert Advance formula: Product\_ID\_r.Unit\_Price\_c

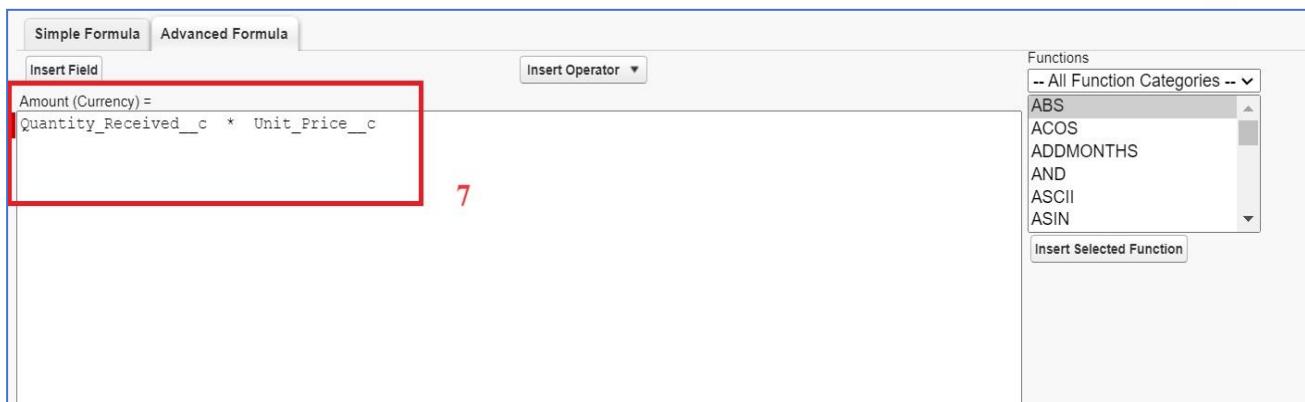


8. Click on Next, Next and Save

### Activity 6: Creating a Amount Formula Field in Order Item object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Formula" and click Next.
5. Enter field label Amount.
6. Select formula return type Currency, Click Next
7. Create and insert Advance formula: Quantity\_Received\_c \* Unit\_Price\_c



8. Click Next, Next, then Save.

## MEDICAL INVENTORY MANAGEMENT

### Create fields in Inventory Management Object

Inventory Transaction		
	Transaction ID(Standard)	Text
	Purchase Order ID	Lookup(Purchase Order)
	Transaction Date	Date
	Transaction Type	Picklist
	Total Order Cost	Formula(Currency)

### Activity 1 : Creating Lookup Relationship in Inventory Management Object

A Lookup relationship is a type of relationship in Salesforce that connects two objects together based on a field known as the Lookup field. It establishes a relationship between a child object and a parent object, allowing the child object to reference the parent object.

To Create a relationship from Inventory Management to Purchase Order .

1. Go to the Setup page >> click on Object manager >> type object name (Inventory Management ) in the quick find bar >> click on the Inventory Management object.
2. Click on Fields & Relationship
3. Click on New.
4. Select “Lookup relationship” as data type and click Next.

Specify the type of information that the custom field will contain.

**Data Type**

None Selected      Select one of the data types below.

Auto Number      A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula      A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary      A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

**Lookup Relationship**      Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship      Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

 The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

External Lookup Relationship      Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

5. Select the related object “ Purchase Order”.

## MEDICAL INVENTORY MANAGEMENT

6. Click on Next.
7. Give Field Label as "Purchase Order ID".
8. Select Required Field.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Inventory Transaction'. On the left, a sidebar lists options like 'Details', 'Fields & Relationships' (which is selected), 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', and 'Record Types'. The main content area is titled 'Inventory Transaction New Relationship'. It's 'Step 3 of 6' with 'Help for this Page' and 'Previous', 'Next', 'Cancel' buttons. The form fields are: 'Field Label' (Purchase Order ID), 'Field Name' (Purchase\_Order\_ID), 'Description' (empty), and 'Help Text' (empty).

9. Click Next, Next, then Save.

### Activity 2: Creating a Date Field in Inventory Transaction object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Inventory Transaction) in quick find box >> click on the Inventory Management object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Date" and click Next.
5. Enter field label Transaction Date

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Inventory Transaction'. On the left, a sidebar lists options like 'Details', 'Fields & Relationships' (selected), 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Search Layouts'. The main content area is titled 'Inventory Transaction New Custom Field'. It's 'Step 2 of 4' with 'Help for this Page' and 'Previous', 'Next', 'Cancel' buttons. The form fields are: 'Field Label' (Transaction Date), 'Field Name' (Transaction\_Date), 'Description' (empty), and 'Help Text' (empty). At the bottom, there are checkboxes for 'Required' (unchecked), 'Auto add to custom report type' (unchecked), and 'Add this field to existing custom report types that contain this entity' (checked). There is also a 'Default Value' field with 'Show Formula Editor'.

## MEDICAL INVENTORY MANAGEMENT

6. Click Next, Next, then Save.

### Activity 3: Creating a Picklist Field in Inventory Transaction Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Inventory Transaction) in quick find box>> click on the Inventory Transaction Object.
2. Now click on “Fields & Relationships” .
3. Click on New.
4. Select Data type as “Picklist” and click Next.
5. Enter Field Label as “Transaction Type”.
6. In values select “Enter values, with each value separated by a new line” and enter values as shown below.
  - Receipt
  - Issue
  - Adjustment

The screenshot shows the 'Step 2. Enter the details' screen for creating a picklist field. The 'Field Label' is set to 'Transaction Type' (labeled 5). Under 'Values', the 'Enter values, with each value separated by a new line' option is selected (labeled 6), and the values 'Receipt', 'Issue', and 'Adjustment' are listed. The 'Next' button is highlighted with a red box (labeled 7).

7. Click Next, Next, then Save.

### Activity 4: Creating a Total Order Cost Formula Field in Inventory Transaction object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Inventory Transaction) in quick find box >> click on the Order Item object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Formula” and click Next.
5. Enter field label Total Order Cost.
6. Select formula return type Currency, Click Next

## MEDICAL INVENTORY MANAGEMENT

7. Create and insert Advance formula: Purchase\_Order\_ID\_\_r.Total\_Order\_Cost\_\_c

The screenshot shows a formula editor interface. At the top, there are two tabs: "Simple Formula" and "Advanced Formula", with "Advanced Formula" being the active tab. Below the tabs are two buttons: "Insert Field" and "Insert Operator". The main area contains the formula "Total Order (Currency) = Purchase\_Order\_ID\_\_r.Total\_Order\_Cost\_\_c". The "Purchase\_Order\_ID\_\_r.Total\_Order\_Cost\_\_c" part is highlighted with a red underline.

8. Click Next, Next, then Save.

### Creating fields for Supplier object

Supplier	Supplier ID(Standard)	Text
	Supplier Name	Text
	Contact Person	Text
	Phone Number	Phone
	Email	Email
	Address	TextArea

### Activity 1: Creating a Text Field in Supplier object

To create fields in an object:

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Supplier custom object.
4. Select Fields & Relationships from the left navigation
5. Click on New
6. Select Text field, click Next

The screenshot shows a configuration dialog for creating a new field. On the left, there is a list of field types with radio buttons: Picklist (Multi-Select), Text (selected and highlighted with a red box), Text Area, Text Area (Long), Text Area (Rich), Text (Encrypted), Time, and URL. To the right of each type is a brief description. At the bottom right are "Next" and "Cancel" buttons, with "Next" also highlighted with a red box.

## MEDICAL INVENTORY MANAGEMENT

7. Enter Field Label as "**Supplier Name**" and Length 12.
8. Select Required Field.

### Step 2. Enter the details

Field Label  i

Please enter the maximum length for a text field below.

Length

Field Name  i

Description

Help Text

9. Click Next, Next, then Save.

### Activity 2: Creating a Text Field in Supplier object

To create fields in an object:

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Supplier custom object.
4. Select Fields & Relationships from the left navigation
5. Click on New
6. Select Text field, click Next

The screenshot shows the 'New Field' configuration screen. On the left, there's a list of field types: Picklist (Multi-Select), Text (selected and highlighted with a red border), Text Area, Text Area (Long), Text Area (Rich), Text (Encrypted), Time, and URL. To the right of each type is a brief description of its functionality. At the bottom right of the dialog are 'Next' and 'Cancel' buttons, with 'Next' also being highlighted with a red border.

Field Type	Description
Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input checked="" type="radio"/> Text	Allows users to enter any combination of letters and numbers.
<input type="radio"/> Text Area	Allows users to enter up to 255 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
<input type="radio"/> Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
<input type="radio"/> Text (Encrypted)	Allows users to enter any combination of letters and numbers and store them in encrypted form.
<input type="radio"/> Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.
<input type="radio"/> URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

7. Enter Field Label as "**Contact Person**" and Length 12.
8. Select Required Field.

## MEDICAL INVENTORY MANAGEMENT

### Step 2. Enter the details

Field Label	<input type="text" value="Contact Person"/> <span style="border: 1px solid #ccc; padding: 2px;">i</span>
Please enter the maximum length for a text field below.	
Length	<input type="text" value="12"/>
Field Name	<input type="text" value="Contact_Person"/> <span style="border: 1px solid #ccc; padding: 2px;">i</span>
Description	<input type="text"/>

9. Click Next, Next, then Save.

### Activity 3: Creating a Phone Field in Supplier object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Supplier) in quick find box>> click on the Supplier object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Phone" and click Next.
5. Enter the Field Label as "**Phone Number**".
6. Select Required Field.

Step 2. Enter the details		Step 2 of 4																					
Previous <span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin: 0 5px;">Next</span> Cancel																							
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Field Label</td> <td><input type="text" value="Phone Number"/> <span style="border: 1px solid #ccc; padding: 2px;">i</span></td> <td style="width: 10%; text-align: center; vertical-align: middle;"><span style="border: 1px solid red; padding: 2px;">5</span></td> </tr> <tr> <td>Field Name</td> <td><input type="text" value="Phone_Number"/> <span style="border: 1px solid #ccc; padding: 2px;">i</span></td> <td style="text-align: center; vertical-align: middle;"><span style="border: 1px solid red; padding: 2px;">7</span></td> </tr> <tr> <td>Description</td> <td colspan="2"><input type="text"/></td> </tr> <tr> <td>Help Text</td> <td colspan="2"><input type="text"/></td> </tr> <tr> <td colspan="3"> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <b>Required</b> <input checked="" type="checkbox"/> Always require a value in this field in order to save a record <span style="border: 1px solid red; padding: 2px; margin-left: 10px;">6</span> </div> <div> <b>Auto add to custom report type</b> <input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity <span style="border: 1px solid #ccc; padding: 2px; margin-left: 10px;">i</span> </div> </td> </tr> <tr> <td>Default Value</td> <td colspan="2"><input type="text" value="Show Formula Editor"/> <span style="border: 1px solid #ccc; padding: 2px; margin-left: 10px;">i</span></td> </tr> <tr> <td colspan="3" style="font-size: small; color: #888; padding-top: 5px;"> <i>Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"). include numbers without quotes : (25), show percentages as decimals : (0.10), and express date calculations in the standard format : (Today() + 7). To reference a field from a Custom Metadata Type record use: \$CustomMetadataType__mdt.RecordAPIName.Field__c</i> </td> </tr> </table>			Field Label	<input type="text" value="Phone Number"/> <span style="border: 1px solid #ccc; padding: 2px;">i</span>	<span style="border: 1px solid red; padding: 2px;">5</span>	Field Name	<input type="text" value="Phone_Number"/> <span style="border: 1px solid #ccc; padding: 2px;">i</span>	<span style="border: 1px solid red; padding: 2px;">7</span>	Description	<input type="text"/>		Help Text	<input type="text"/>		<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <b>Required</b> <input checked="" type="checkbox"/> Always require a value in this field in order to save a record <span style="border: 1px solid red; padding: 2px; margin-left: 10px;">6</span> </div> <div> <b>Auto add to custom report type</b> <input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity <span style="border: 1px solid #ccc; padding: 2px; margin-left: 10px;">i</span> </div>			Default Value	<input type="text" value="Show Formula Editor"/> <span style="border: 1px solid #ccc; padding: 2px; margin-left: 10px;">i</span>		<i>Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"). include numbers without quotes : (25), show percentages as decimals : (0.10), and express date calculations in the standard format : (Today() + 7). To reference a field from a Custom Metadata Type record use: \$CustomMetadataType__mdt.RecordAPIName.Field__c</i>		
Field Label	<input type="text" value="Phone Number"/> <span style="border: 1px solid #ccc; padding: 2px;">i</span>	<span style="border: 1px solid red; padding: 2px;">5</span>																					
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Help Text	<input type="text"/>																						
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <b>Required</b> <input checked="" type="checkbox"/> Always require a value in this field in order to save a record <span style="border: 1px solid red; padding: 2px; margin-left: 10px;">6</span> </div> <div> <b>Auto add to custom report type</b> <input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity <span style="border: 1px solid #ccc; padding: 2px; margin-left: 10px;">i</span> </div>																							
Default Value	<input type="text" value="Show Formula Editor"/> <span style="border: 1px solid #ccc; padding: 2px; margin-left: 10px;">i</span>																						
<i>Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"). include numbers without quotes : (25), show percentages as decimals : (0.10), and express date calculations in the standard format : (Today() + 7). To reference a field from a Custom Metadata Type record use: \$CustomMetadataType__mdt.RecordAPIName.Field__c</i>																							

7. Click on Next, Next and Save.

## MEDICAL INVENTORY MANAGEMENT

### Activity 4: Creating a Email Field in Supplier object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Supplier) in quick find box>> click on the Supplier object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Email” and click Next.
5. Enter the Field Label as “ **Email**”.

Step 2. Enter the details Step 2 of 4

Field Label  5

Field Name  6

Description

Help Text

Required  Always require a value in this field in order to save a record

Unique  Do not allow duplicate values

External ID  Set this field as the unique record identifier from an external system

Auto add to custom report type  Add this field to existing custom report types that contain this entity

6. Click on Next, Next and Save.

### Activity 5: Creating a Text Area Field in Supplier object

To create fields in an object:

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Supplier custom object.
4. Select Fields & Relationships from the left navigation
5. Click on New
6. Select TextArea field, click Next

Text

Text Area 6

Text Area (Long)

Text Area (Rich)

Text (Encrypted) 7

Time

URL

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50 600" are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

7. Enter Field Label as “**Address**” .

## MEDICAL INVENTORY MANAGEMENT

### Step 2. Enter the details

Field Label  i

Field Name  i

Description

8. Click on next,next, then Save.

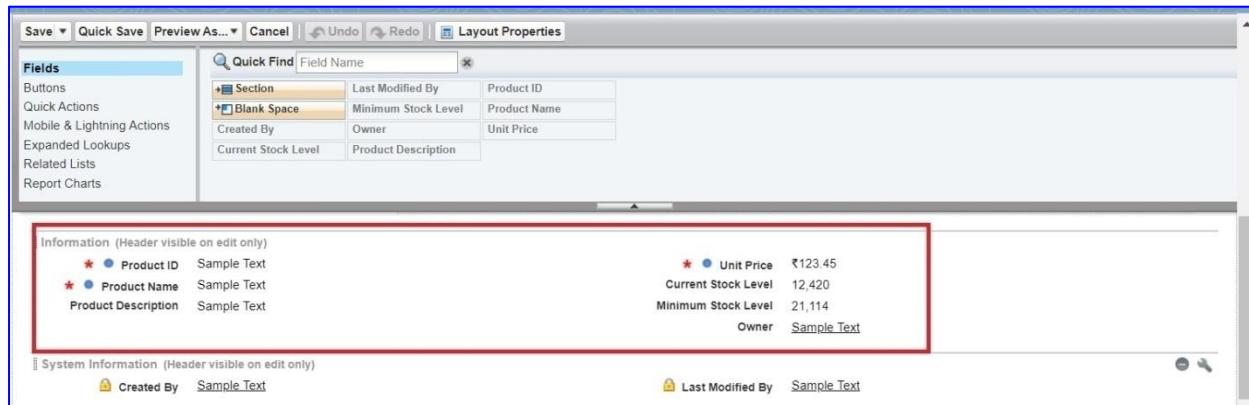
# MEDICAL INVENTORY MANAGEMENT

## Milestone-6

### Editing of Page Layouts

#### Activity 1: To edit a Page Layout in Product Object

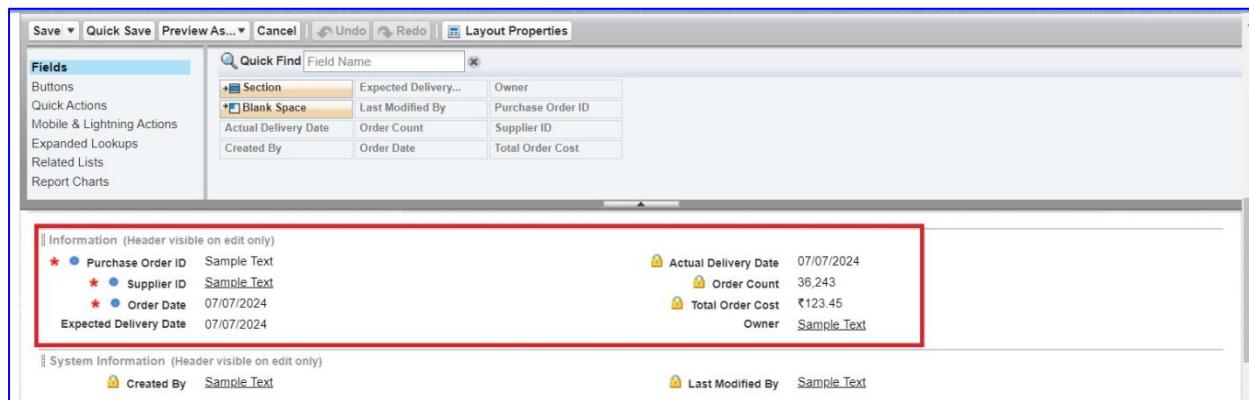
1. Go to setup >> click on Object Manager >> type object name(**Product**) in quick find box >> click on the Product object >> Page Layouts .
2. Click on the Product Layout.
3. Drag and Arrange the field as shown below.



4. Click on Save.

#### Activity 2: To edit a Page Layout in Purchase Order Object

1. Go to setup >> click on Object Manager >> type object name(**Purchase Order**) in quick find box >> click on the Purchase Order object >> Page Layouts.
2. Click on the Purchase Order Layout
3. Drag and Arrange the field as shown below



4. Click on field Order Date >> click on settings >> select Required and save it.
5. Click on field Total Order Cost >> click on settings >> select Read Only and save it.
6. Click Save.

## MEDICAL INVENTORY MANAGEMENT

### Activity 3: To edit a Page Layout in Order Item Object

1. Go to setup >> click on Object Manager >> type object name(**Order Item**) in quick find box >> click on the Order Item object >> Page Layouts.
2. Click on the Order Item Layout
3. Drag and Arrange the field as shown below

The screenshot shows the Salesforce Object Manager for the 'Order Item' object. The left sidebar lists various layout options: Details, Fields & Relationships, Page Layouts (which is selected and highlighted in blue), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main area displays the 'Page Layout Properties' interface. At the top, there are buttons for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. A 'Fields' section contains a 'Quick Find' field and a table of fields grouped by sections: 'Section' (Order Item ID, Last Modified By, Quantity Ordered), 'Blank Space' (Order Item ID, Quantity Received), 'Amount' (Product ID, Unit Price), 'Created By' (Purchase Order ID), and 'Purchase Order ID' (Unit Price). Below this is a large red-bordered area containing the following fields:

- Information (Header visible on edit only):
  - \* Order Item ID: Sample Text
  - Amount: ₹123.45
  - Purchase Order ID: Sample Text
- Product details:
  - Product ID: Sample Text
  - Unit Price: ₹123.45
  - Quantity Ordered: 23,712
  - Quantity Received: 33,407
- System Information (Header visible on edit only):
  - Created By: Sample Text
  - Last Modified By: Sample Text
- Custom Links (Header visible on edit only)

4. Click Save.

### Activity 4: To edit a Page Layout in Inventory Transaction Object

1. Go to setup >> click on Object Manager >> type object name(**Inventory Transaction**) in quick find box >> click on the Inventory Transaction object >> Page Layouts.
2. Click on the Inventory Transaction Layout
3. Drag and Arrange the field as shown below

The screenshot shows the Salesforce Object Manager for the 'Inventory Transaction' object. The left sidebar lists various layout options: Details, Fields & Relationships, Page Layouts (selected and highlighted in blue), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main area displays the 'Page Layout Properties' interface. At the top, there are buttons for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. A 'Fields' section contains a 'Quick Find' field and a table of fields grouped by sections: 'Section' (Owner, Transaction ID), 'Blank Space' (Purchase Order ID, Transaction Type), 'Created By' (Total Order Cost), and 'Last Modified By' (Transaction Date). Below this is a large red-bordered area containing the following fields:

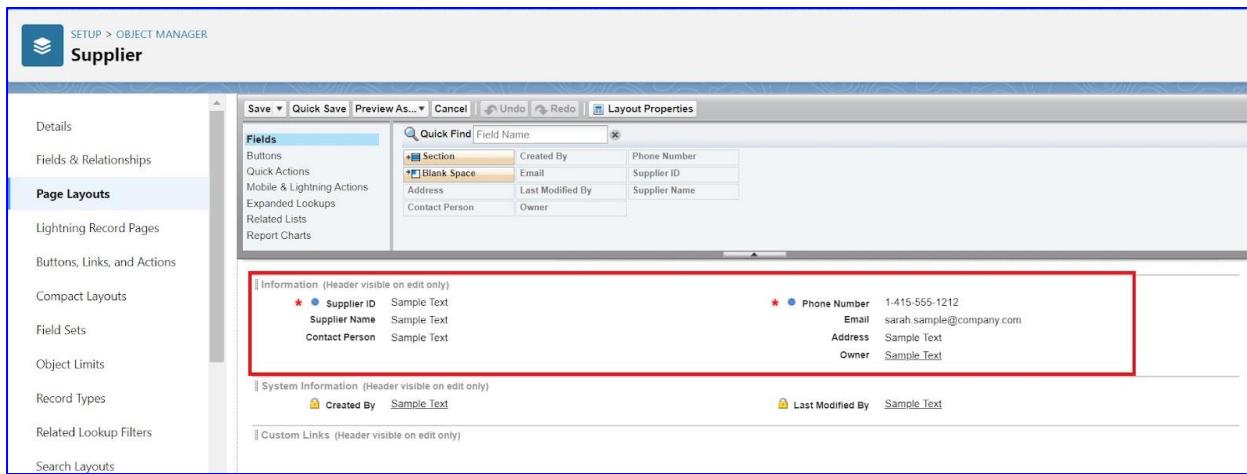
- Information (Header visible on edit only):
  - \* Transaction ID: Sample Text
  - Purchase Order ID: Sample Text
  - Transaction Type: Sample Text
  - Transaction Date: 07/07/2024
  - Total Order Cost: ₹123.45
  - Owner: Sample Text
- System Information (Header visible on edit only):
  - Created By: Sample Text
  - Last Modified By: Sample Text

## MEDICAL INVENTORY MANAGEMENT

4. Click Save.

### Activity 5: To edit a Page Layout in Supplier Object

1. Go to setup >> click on Object Manager >> type object name(**Supplier**) in quick find box >> click on the Supplier object >> Page Layouts.
2. Click on the Supplier Layout
3. Drag and Arrange the field as shown below



4. Click Save.

# MEDICAL INVENTORY MANAGEMENT

## Milestone-7

### Compact Layouts Creation

#### Activity 1: To create a Compact Layout to a Product Object

1. Go to setup >> click on Object Manager >> type object name(**Product**) in quick find box >> click on the Product object
2. Click on Compact Layouts in the sidebar .
3. Click on New.

SETUP > OBJECT MANAGER  
Product

Details  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
**Compact Layouts** 2  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
System Default	SYSTEM	✓		3

4. Enter the Label as "**Product Compact Layout**".
5. Select the Compact Layout Fields : Select Product name, Unit Price, Current Stock Level.
6. Click Save.

Enter Compact Layout Information

Label: Product Compact Layout  
Name: Product\_Compact\_Layout 4

Select Compact Layout Fields

Available Fields	Selected Fields
Created By Last Modified By Minimum Stock Level Owner Product ID	Product Name Unit Price Current Stock Level 5

Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.

6 Save Cancel

7. Click Compact Layout Assignment.
8. Click Edit Assignment.
9. Choose "Product Compact Layout" from the dropdown.
10. Click Save

## MEDICAL INVENTORY MANAGEMENT

**Enter Compact Layout Information**

Label	<input type="text" value="Product Compact Layout"/>	4
Name	<input type="text" value="Product_Compact_Layout"/>	<small>[i]</small>

**Select Compact Layout Fields**

Available Fields	Selected Fields
Created By Last Modified By Minimum Stock Level Owner Product ID	Product Name Unit Price Current Stock Level

Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.

Add
Remove
Top
Up
Down
Bottom

5

6 Save Cancel

### Activity 2: To create a Compact Layout to a Purchase Order Object

1. Go to setup >> click on Object Manager >> type object name(**Purchase Order**) in quick find box >> click on the Purchase Order object
2. Click on Compact Layouts in the sidebar .
3. Click on New.
4. Enter the Label as "**Purchase Order Compact Layout**".
5. Select the Compact Layout Fields : Select Purchase Order ID, Order Date, Total Order Cost, Supplier ID.
6. Click Save.

**Compact Layout Edit**

Save	Cancel
------	--------

**Enter Compact Layout Information**

Label	<input type="text" value="Purchase Order Compact L"/>	4
Name	<input type="text" value="Purchase_Order_Compact"/>	<small>[i]</small>

**Select Compact Layout Fields**

Available Fields	Selected Fields
Actual Delivery Date Created By Expected Delivery Date Last Modified By Owner Order Count	Purchase Order ID Order Date Total Order Cost Supplier ID

Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.

Add
Remove
Top
Up
Down
Bottom

5

6 Save Cancel

7. Click Compact Layout Assignment.
8. Click Edit Assignment.
9. Choose "Purchase Order Compact Layout" from the dropdown.
10. Click Save.
- 11.

# MEDICAL INVENTORY MANAGEMENT

## Milestone-8

### Validation Rules Creation

#### Activity 1: To create an Expected Delivery Date Validation rule to a Purchase Order Object

1. Go to setup >> click on Object Manager >> type object name(**Purchase Order**) in quick find box>> click on the Purchase Order object.
2. Click on the validation rule >> click on New.
3. Enter the Rule name as "**Expected Delivery Date Validation**".
4. Select Active.
5. Insert the Error Condition Formula as :

(Expected\_Delivery\_Date\_\_c - Order\_Date\_\_c) > 7

Purchase Order Validation Rule Help for this Page 

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

**Validation Rule Edit**

Save Save & New Cancel

Rule Name: **Expected\_Delivery\_Date\_Validation** 3

Active:  4

Description:

Quick Tips • Operators & Functions

Error Condition Formula

Example: **Discount\_Percent\_\_c>0.30** More Examples... \* = Required Information

Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

Insert Field Insert Operator (Expected\_Delivery\_Date\_\_c - Order\_Date\_\_c) > 7 5

Functions -- All Function Categories --

ABS  
ACOS  
ADDMONTHS  
AND  
ASCII  
ASIN

6. Enter the Error Message as "The Expected Delivery Date should not exceed 7 days."
7. Select the Error location as Top of Page
8. Click Save.

Error Message

Example: **Discount percent cannot exceed 30%**

This message will appear when Error Condition formula is **true**

Error Message: **The Expected Delivery Date should not exceed 7 days.** 6

This error message can either appear at the top of the page or below a specific field on the page

Error Location:  **Top of Page**  Field 7

Save Save & New Cancel 8

# MEDICAL INVENTORY MANAGEMENT

## Milestone-9

### Profiles Creation

#### Activity 1: To create an Inventory Manager Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (**Inventory Manager**) >> Save.

The screenshot shows the Salesforce Setup interface under the Profiles section. A list of profiles is displayed, with the 'Standard User' profile selected and its 'Edit | Clone' link highlighted by a red box. Other profiles shown include Salesforce API Only System Integrations, Silver Partner User, Solution Manager, Standard Platform User, and System Administrator.

#### Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile    Standard User

User License    Salesforce

Profile Name

2. While still on the profile page, then click Edit.

## MEDICAL INVENTORY MANAGEMENT

- Select the Custom App settings as default for the Medical Inventory Management.

The screenshot shows the 'Profiles' section under 'SETUP'. It lists various standard and custom apps with checkboxes for 'Visible' and 'Default'. The 'Medical Inventory Management' app is highlighted with a red border and has its 'Default' checkbox checked.

Custom App Settings		Visible	Default	Visible	Default
All Tabs (standard__AllTabSet)		<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Lightning_Sales)	<input checked="" type="checkbox"/>
Analytics Studio (standard__Insights)		<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)		<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>
Bolt Solutions (standard__lightningBolt)		<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>
Community (standard__Community)		<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>
Content (standard__Content)		<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>
Data Manager (standard__DataManager)		<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input checked="" type="checkbox"/>
Digital Experiences (standard__SalesConsoleDS)		<input checked="" type="checkbox"/>	<input type="radio"/>	Service Console (standard__LightningService)	<input checked="" type="checkbox"/>
Lightning User App (standard__LightningInstrumentation)		<input checked="" type="checkbox"/>	<input type="radio"/>	Site.com (standard__Sites)	<input checked="" type="checkbox"/>
Marketing CRM Class (standard__Marketing)		<input checked="" type="checkbox"/>	<input type="radio"/>	Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>
Medical Inventory Management (Medical_Inventory_Management)		<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard__Work)	<input checked="" type="checkbox"/>
Queue Management (standard__QueueManagement)		<input checked="" type="checkbox"/>	<input type="radio"/>		

- Scroll down to Custom Object Permissions and Give access permissions as mentioned in the below diagram.

The screenshot shows the 'Custom Object Permissions' section. It lists several objects with checkboxes for various access levels. The 'Products' object's permissions are highlighted with a red border.

Object	Basic Access						Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Inventory Transactions	<input checked="" type="checkbox"/>											
Order Items	<input checked="" type="checkbox"/>											
Products	<input checked="" type="checkbox"/>											
Purchase Orders	<input checked="" type="checkbox"/>											
Suppliers	<input checked="" type="checkbox"/>											

- Change the password policies as mentioned :
- User passwords expire in should be " never expires ".
- Minimum password length should be " 8 ", and click save.

The screenshot shows the 'Password Policies' section. It includes fields for password expiration, history, length, complexity, and other security settings. The 'User passwords expire in' field is set to 'Never expires'.

User passwords expire in	Never expires
Enforce password history	3 passwords remembered
Minimum password length	8
Password complexity requirement	Must include alpha and numeric characters
Password question requirement	Cannot contain password
Maximum invalid login attempts	10
Lockout effective period	15 minutes
Obscure secret answer for password resets	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>
Don't immediately expire links in forgot password emails	<input type="checkbox"/>

### Activity 2: To create an Purchase Manager Profile

- Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (**Purchase Manager**) >> Save.
- While still on the profile page, then click Edit.
- Select the Custom App settings as default for the Medical Inventory Management.

# MEDICAL INVENTORY MANAGEMENT

Set the permissions and page layouts for this profile.

**Profile Edit**

Name: Purchase Manager  
User License: Salesforce  
Description:

Custom Profile:

**Custom App Settings**

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>
Marketing CRM Classic (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="radio"/>	Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>
Medical Inventory Management (Medical_Inventory_Management)	<input type="checkbox"/>	<input checked="" type="radio"/>	Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input checked="" type="checkbox"/>	<input type="radio"/>

4. Scroll down to Custom Object Permissions and Give access permissions as mentioned in the below diagram.

**Custom Object Permissions**

	Basic Access				Data Administration			
	Read	Create	Edit	Delete	View All	Modify All		
Inventory Transactions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Order Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Products	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Purchase Orders	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Suppliers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

5. Change the password policies as mentioned :
6. User passwords expire in should be " never expires ".
7. Minimum password length should be " 8 ", and click save.

**Password Policies**

User passwords expire in	Never expires <input type="button" value="▼"/>
Enforce password history	3 passwords remembered <input type="button" value="▼"/>
Minimum password length	8 <input type="text"/>
Password complexity requirement	Must include alpha and numeric characters <input type="button" value="▼"/>
Password question requirement	Cannot contain password <input type="button" value="▼"/>
Maximum invalid login attempts	10 <input type="button" value="▼"/>
Lockout effective period	15 minutes <input type="button" value="▼"/>
Obscure secret answer for password resets	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>
Don't immediately expire links in forgot password emails	<input type="checkbox"/> <input type="button" value="i"/>

**Buttons:** Save  Cancel

# MEDICAL INVENTORY MANAGEMENT

## Milestone-10

### Roles Creation

#### Activity 1 : Create a Purchasing Manager Role.

1. Go to quick find >> Search for Roles >> click on Set Up Roles.

The screenshot shows the Salesforce Setup - Roles page. The left sidebar has a search bar for 'roles' and a 'Roles' section under 'Sales'. The main area displays a 'Role Hierarchy' diagram:

- Executive Staff:** CEO, President, CFO, VP Sales, Director of Marketing, Director of HR, Director of R&D.
- Western Sales Director:** Director of W. Sales, Western Sales Rep, GA Sales Rep, OR Sales Rep.
- Eastern Sales Director:** Director of E. Sales, Eastern Sales Rep, NY Sales Rep, MA Sales Rep.
- International Sales Director:** Director of Int'l Sales, International Sales Rep, Asian Sales Rep, European Sales Rep.

Annotations explain access levels:

- CEO, President, CFO, VP Sales, Director of Marketing, Director of HR, Director of R&D: View & edit data, roll up forecasts, & generate reports for all users below them.
- Western Sales Director, Eastern Sales Director, International Sales Director: View & edit data, roll up forecasts, & generate reports for all users directly below them.
- Western Sales Rep, Eastern Sales Rep, International Sales Rep: Can't access data of other roles at same level.
- GA Sales Rep, OR Sales Rep, NY Sales Rep, MA Sales Rep, Asian Sales Rep, European Sales Rep: View & edit data, roll up forecasts, & generate reports for all users directly below them.
- Int'l Sales Rep: Can't access data of other roles at same level.

Buttons at the bottom include 'Set Up Roles' and 'Don't show this page again'.

2. Click on Expand All and click on add role under SVP, Sales & Marketing role.
3. Give Label as "**Purchasing Manager**" and Role name gets auto populated. Then click on Save.

The screenshot shows the Salesforce Role Edit - New Role page. The 'Role Edit' section contains the following fields:

- Label:** Purchasing Manager
- Role Name:** Purchasing\_Manager
- This role reports to:** SVP, Sales & Marketing (with a magnifying glass icon)

Annotations highlight the 'Label' and 'Role Name' fields, and the 'This role reports to' dropdown.

Buttons at the bottom include 'Save', 'Save & New', and 'Cancel'.

#### Activity 2 : Create a Purchasing Manager Role.

1. Go to quick find >> Search for Roles >> click on Set Up Roles.

# MEDICAL INVENTORY MANAGEMENT

The screenshot shows the Salesforce Setup Roles page. On the left, there's a sidebar with a search bar and sections for Users, Feature Settings, Sales, Service, and Case Teams. A red box highlights the 'Roles' section in the sidebar. The main area displays a 'Sample Role Hierarchy' titled 'Territory-based Sample'. It shows a hierarchy from 'Executive Staff' down to 'Western Sales Rep' and 'Eastern Sales Rep'. A callout box provides details about the hierarchy levels. At the bottom right of the main area is a 'Set Up Roles' button.

2. Click on Expand All and click on add role under SVP, Sales & Marketing role.
3. Give Label as "**Inventory Manager**" and the Role name gets auto populated. Then click on Save.

The screenshot shows the Salesforce Role Edit page for creating a new role. The title is 'Role Edit' and the sub-section is 'New Role'. The 'Role Edit' form has three fields highlighted with a red box: 'Label' (set to 'Inventory Manager'), 'Role Name' (auto-filled as 'Inventory\_Manager'), and 'This role reports to' (set to 'SVP, Sales & Marketing'). Below the form is a field for 'Role Name as displayed on reports'. At the bottom right are 'Save', 'Save & New', and 'Cancel' buttons, with 'Save' being the one highlighted by a red box.

# MEDICAL INVENTORY MANAGEMENT

## Milestone-11

### Users Creation

#### Activity 1 : Create a Purchasing Manager User.

1. Go to setup >> type users in quick find box >> Select Users >> click on New User.

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar is open, showing various categories like Permission Set Groups, Profiles, Public Groups, Queues, Roles, and User Management Settings. Under User Management Settings, the 'Users' option is selected and highlighted with a red box, labeled '2'. In the center, the 'Users' page is displayed with the title 'All Users'. A sub-header says 'On this page you can create, view, and manage users.' Below it, there's a note about downloading the Salesforce mobile app for iOS and Android. A 'View' dropdown is set to 'All Users'. At the top right of the main area, there are buttons for 'New User' (highlighted with a red box, labeled '3'), 'Reset Password(s)', and 'Add Multiple Users'. The main table lists existing users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table data is as follows:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	1_User	u1	utkarsh2@vanshiv.com	Operator_1	<input checked="" type="checkbox"/>	operator
<input type="checkbox"/> Edit	2_User	u2	utkarsh3@vanshiv.com	Operator_2	<input checked="" type="checkbox"/>	operator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d2w00000rs8akeajmurolkfif1@chatter.salesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Edit	Technologies_vanshiv	VTech	vehicledemo@vanshiv.com	System Administrator	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Edit	Teddy John	ted	utkarsh1@vanshiv.com	Vehicle Manager	<input checked="" type="checkbox"/>	Vehicle Manager

2. Enter the First Name- John, Last Name- PuchaseM and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
3. Select Role as Purchasing Manager.
4. Select a User License as salesforce.
5. NOTE- As Salesforce license can only be used by 2 Users at a time in Dev Org, So If you don't find a salesforce license then deactivate a user who has a salesforce license or change the license type from Salesforce to any other.
6. Select a profile as Purchase Manager.
7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.
8. Click on Save.

# MEDICAL INVENTORY MANAGEMENT

User Edit      Save | Save & New | Cancel

General Information

First Name	John
Last Name	PurchaseM
Alias	jpurc
Email	annapurnabethi@gmail.com
Username	john@purchaseM.com
Nickname	John
Title	
Company	
Department	
Division	

Role: Purchasing Manager  
User License: Salesforce  
Profile: Purchase Manager  
Active:

Marketing User  
Offline User  
Knowledge User  
Flow User  
Service Cloud User  
Site.com Contributor User  
Site.com Publisher User  
WDC User  
Data.com User Type:

Data.com Monthly Addition Limit: Default Limit (300)  
Accessibility Mode (Classic Only):   
High-Contrast Palette on Charts:

## Activity 2 : Create an Inventory Manager User.

1. Go to setup >> type users in quick find box >> Select Users >> click on New User.

Setup Home Object Manager

Q user 1

Users 2

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users | Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit	1. User	v1	utkarsh2@yahoo.com	Operator_1	<input checked="" type="checkbox"/>	operator
<input type="checkbox"/>   Edit	2. User	v2	utkarsh3@yahoo.com	Operator_2	<input checked="" type="checkbox"/>	operator
<input type="checkbox"/>   Edit	Chatter Expert	Chatter	chatty.00d2w00000rs8akeajmuqjxkf1@chatter.salesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	
<input type="checkbox"/>   Edit	Technologies Vanshiv	VTech	vehicledemo@vanshiv.com	System Administrator	<input checked="" type="checkbox"/>	
<input type="checkbox"/>   Edit	Teddy. John	ted	utkarsh1@yahoo.com	Vehicle Manager	<input checked="" type="checkbox"/>	Vehicle Manager

3 New User | Reset Password(s) | Add Multiple Users

2. Enter the First Name- Ram, Last Name- Krishna and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
3. Select Role as Inventory Manager.
4. Select a User License as salesforce.

## **MEDICAL INVENTORY MANAGEMENT**

5. NOTE- As Salesforce license can only be used by 2 Users at a time in Dev Org, So If you don't find a salesforce license then deactivate a user who has a salesforce license or change the license type from Salesforce to any other.
6. Select a profile as Inventory Manager.
7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.
8. Click on Save.

# MEDICAL INVENTORY MANAGEMENT

## Milestone-12

### Permission Sets Creation

#### Activity 1 : Create a Permission Set.

1. Go to setup >> type Permission in quick find box >> Select Permission Set >> click on New.

The screenshot shows the Salesforce Setup interface under the 'Permission Sets' section. On the left, there's a sidebar with 'Permission' selected. The main area displays a table of 'Permission Sets' with columns for 'Action', 'Permission Set Label', 'Description', and 'License'. A red box highlights the 'New' button at the top left of the table. The table lists various permission sets like 'Buyer', 'CRM User', etc., with their descriptions and licenses.

2. Enter Label as **Purchase Manager Create Access** >> Click on Save.

The screenshot shows the 'Permission Set Create' page. It has fields for 'Label' (set to 'Purchase Manager Create Access'), 'API Name' (set to 'Purchase\_Manager'), and 'Description'. The 'Save' button is highlighted with a red box. The page also includes a note about session activation and a help link.

3. From Object Settings >> Select Order Item >> Enable for both Tab Available and Visible >>
4. Enable Read and Create in Object Permissions >> Click on Save.

The screenshot shows the 'Purchase Manager Create Access' object settings page. It has tabs for 'Find Settings...', 'Clone', 'Delete', 'Edit Properties', 'Manage Assignments', and 'View Summary'. The 'Order Items' tab is selected. Under 'Order Items', there are 'Tab Settings' and 'Object Permissions' sections. In 'Tab Settings', 'Available' and 'Visible' checkboxes are checked. In 'Object Permissions', 'Read' and 'Create' checkboxes are checked. The 'Save' button is highlighted with a red box.

## MEDICAL INVENTORY MANAGEMENT

5. Navigate to the Permission Set detail page >> Click Manage Assignments >> Click Add Assignments >> Select the user John PurchaseM to assign the permission set to and click Next.

The screenshot shows the 'Purchase Manager Create Access' assignment screen. It lists users assigned to the permission set, with one user, 'John PurchaseM', selected and highlighted with a red box. The 'Next' button at the bottom right is also highlighted with a red box.

Full Name	Alias	Username	Role	Active	Profile
Annapurna Gurram	AGurr	medicalinventory@sb.com	System Administrator	✓	
Chatter Expert	Chatter	chatty.0ddl0000058bqlua.yrgohck7wjvo@chatter.salesforce.com	Chatter Free User	✓	
Integration User	integ	integration@0ddl0000058bqlua.com	Analytics Cloud Integration User	✓	
<b>John PurchaseM</b>	jpurc	john@purchasem.com	Purchasing Manager	✓	Purchase Manager
Security User	sec	insightssecurity@0ddl0000058bqlua.com	Analytics Cloud Security User	✓	

6. Select No Expiration date >> Click on Assign.

The screenshot shows the 'Purchase Manager Create Access' assignment screen. The 'No expiration date' radio button is selected and highlighted with a red box. The 'Assign' button at the bottom right is also highlighted with a red box.

Select an Expiration Option For Assigned Users

No expiration date  Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone: Select a time zone...

Full Name	Role	Profile	Active	User License	Expires On
John PurchaseM	Purchasing Manager	Purchase Manager	✓	Salesforce	Never Expires

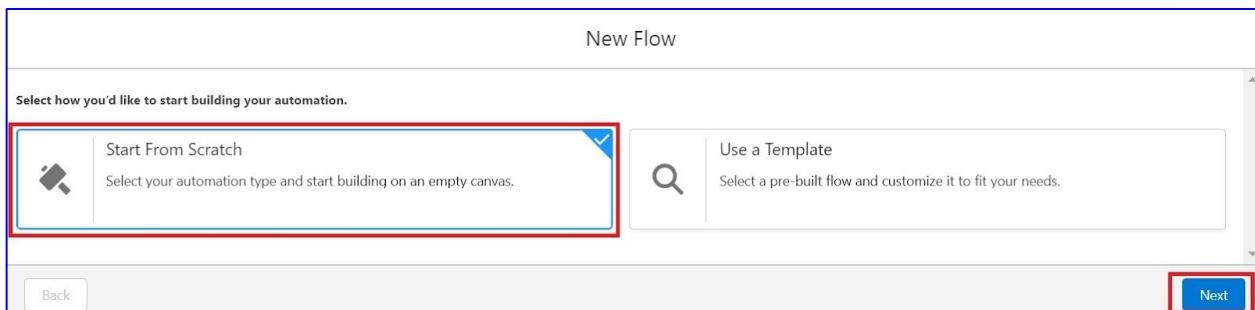
# MEDICAL INVENTORY MANAGEMENT

## Milestone-13

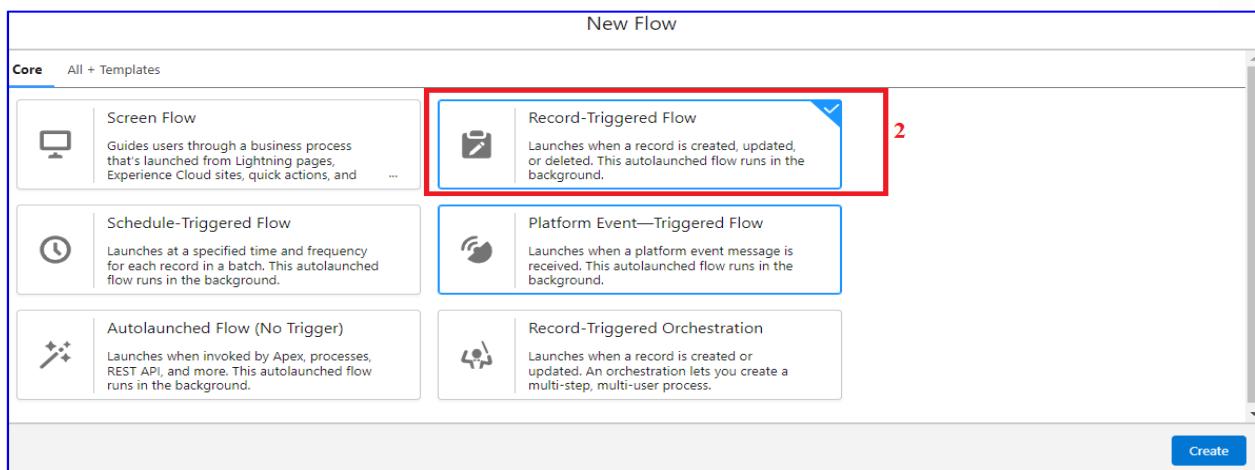
### Flows Creation

#### Activity 1 : Create Flow to update the Actual Delivery Date.

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow >> Start From Scratch .

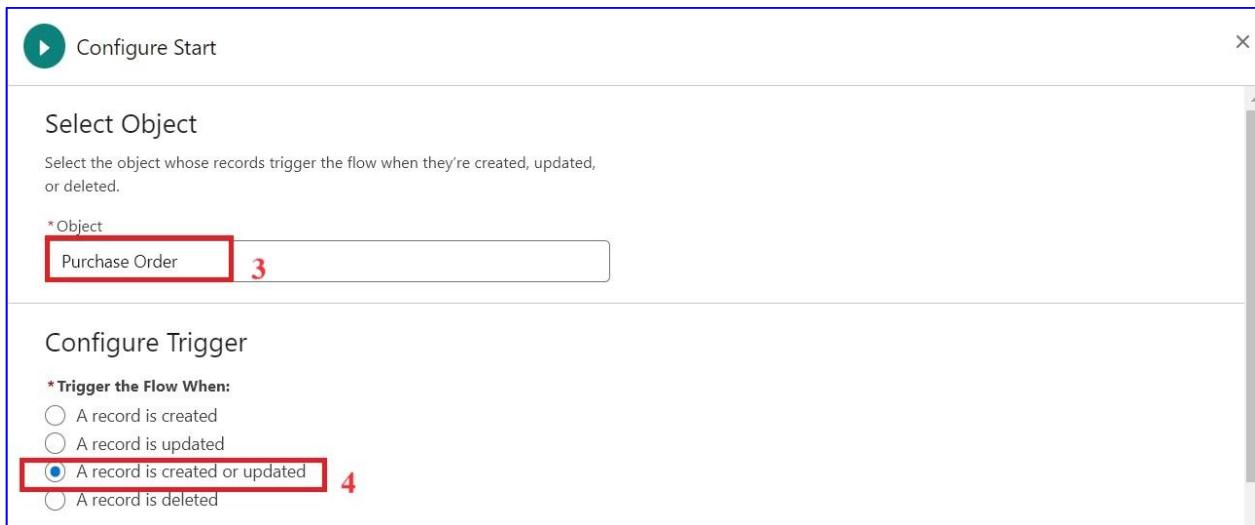


2. Select the record Triggered flow.Click on create.



3. Under Object select “Purchase Order”

4. Select A record is created or updated



## MEDICAL INVENTORY MANAGEMENT

5. Set Entry Conditions : None
6. Select Fast Field Updates and click on Done

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

None 5

\*Optimize the Flow for:

**Fast Field Updates**  
Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

**Actions and Related Records**  
Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

7. Under the record trigger flow click on the "+" icon and select Get Records.
8. Enter Label as "**Get Purchase Record**".
9. For Object select Purchase Order.
10. For Condition Requirements , select All Conditions are Met(AND)
11. For the first condition select as follows:

Field: Id

Operator: Equals

Value: {\$Record.Id}

Get Records

\* Label **Get Purchase Record** 8

\* API Name **Get\_Purchase\_Record**

Description

Get Records of This Object

\* Object **Purchase Order** 9

Filter Purchase Order Records 10

Condition Requirements

All Conditions Are Met (AND)

Field **Id** Operator **Equals** Value **Aa \$Record > Record ID**

+ Add Condition

12. For How many Records to store Select Only the First Record.

## MEDICAL INVENTORY MANAGEMENT

13. For How to Store Record Data select Choose fields and let Salesforce do the rest. Select Field: Order\_Date\_c. Click on Done.

How Many Records to Store

Only the first record

All records

How to Store Record Data

Automatically store all fields

Choose fields and let Salesforce do the rest

Choose fields and assign variables (advanced)

Select Purchase Order Fields to Store in Variable

Field
ID
Order_Date_c

+ Add Field

14. In the Flow Builder, click on the Manager tab on the left-hand side >> Click on New Resource >> In the Resource Type dropdown, select Variable.
15. Enter API name as ActualDeliveryDate >> Select Data type as Date >> Click on Done.
16. From the Toolbox drag and drop Assignment element.
17. Enter the label as "Assignment".
18. Set Variable Values:

a) Variable : {!ActualDeliveryDate}

Operator : Equals

Value : {!\$Record.Order\_Date\_c}

b) Variable : {!ActualDeliveryDate}

Operator : Add

Value : 3

## MEDICAL INVENTORY MANAGEMENT

Assignment

* Label	* API Name <span style="color: #0070C0;">i</span>	
Assignment	Assignment_1	
Description		
<div style="height: 100px; border: 1px solid #ccc; margin-top: 10px;"></div>		
<b>Set Variable Values</b>		
Each variable is modified by the operator and value combination.		
Variable	Operator	Value
<span style="font-size: 2em;">CALENDAR</span> ActualDeliveryDate <span style="color: #0070C0;">X</span>	Equals <span style="float: right;">▼</span>	<span style="font-size: 2em;">CALENDAR</span> \$Record > Order Date <span style="color: #0070C0;">X</span> <span style="float: right;">trash</span>
Variable	Operator	Value
<span style="font-size: 2em;">CALENDAR</span> ActualDeliveryDate <span style="color: #0070C0;">X</span>	Add <span style="float: right;">▼</span>	3 <span style="float: right;">trash</span>
<span style="color: #0070C0;">+</span> Add Assignment		

19. Click Done
20. From the Toolbox drag and drop Update Records element and connect to the Assignment element.
21. Enter the label as "Updating Purchasing Order".
22. How to Find Records to Update and Set Their Values : Use the Purchase Order record that triggered the flow
23. Set Filter Conditions : None -Always Update Record
24. Set Field Values for the Trip Record as  
Field : Actual\_Delivery\_Date\_\_c  
Value : {!ActualDeliveryDate}

# MEDICAL INVENTORY MANAGEMENT

Update Records

\* How to Find Records to Update and Set Their Values

- Use the purchase order record that triggered the flow
- Update records related to the purchase order record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

Because this flow runs *before* a record is saved, you can only update the record that triggered the flow to run. To update other records, configure the trigger to run the flow *after* the record is saved.

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Purchase Order Record

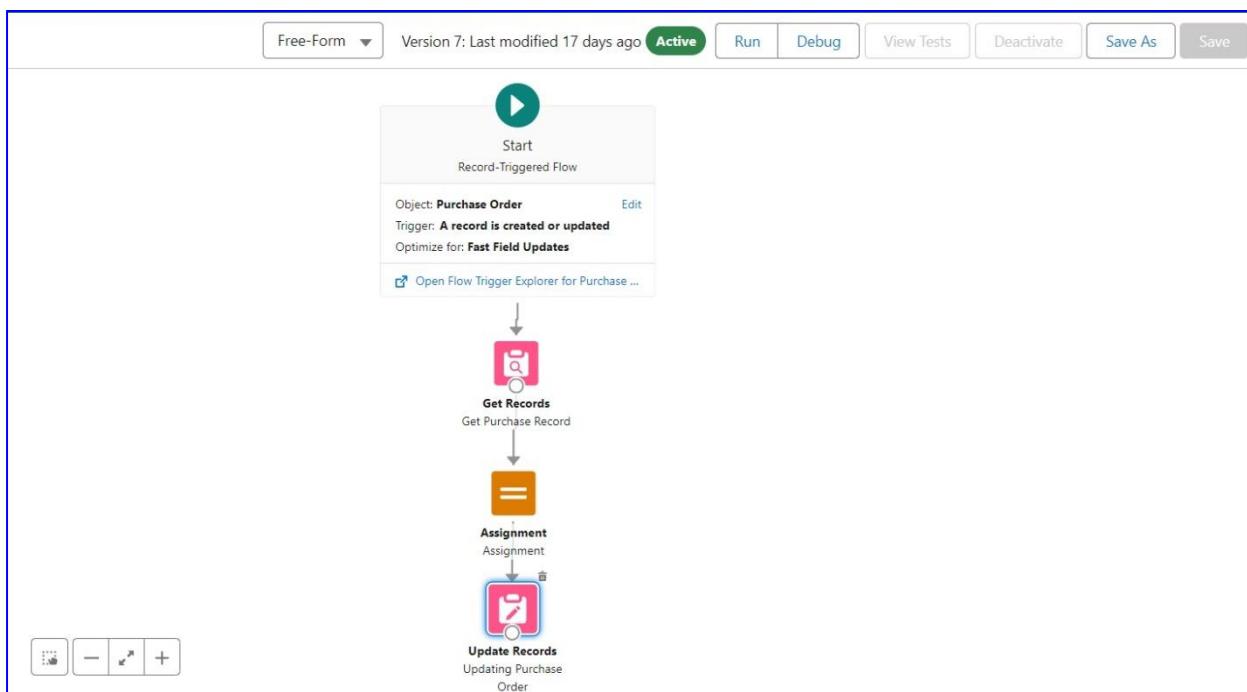
Field	Value
Actual_Delivery_Date_c	ActualDeliveryDate

+ Add Field

25. Click Done

26. Save the flow as "Actual Delivery Date Updating".

27. Activate the flow.



## MEDICAL INVENTORY MANAGEMENT

### Milestone-14

#### **Activity 1 : Create a Trigger to Calculate total amount on Order Item.**

##### **Step 1 :** Login to Salesforce:

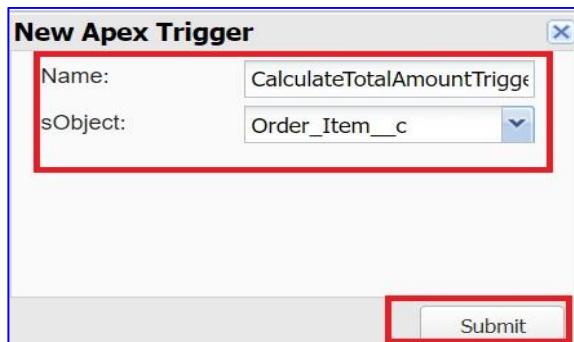
Log in to your Salesforce account with administrative privileges.

##### **Step 2:**

- i. Navigate to Setup: Once logged in, click on the gear icon ?? (Setup) located at the top-right corner of the page. This will open the Setup menu.
- ii. Click on Developer Console: Click on the "Developer Console" option from the Setup menu. This will open the Developer Console in a new browser tab or window.

##### **Step 3:**

- i. In the Developer Console window, go to the top menu and click on "File".
- ii. Select New: From the dropdown menu under "File", select "New".
- iii. Choose Apex Trigger: This will open a new Apex Trigger editor tab.



##### **Create an Apex Trigger:**

```
trigger CalculateTotalAmountTrigger on Order_Item__c (after insert, after update, after delete, after undelete) {  
    // Call the handler class to handle the logic  
    CalculateTotalAmountHandler.calculateTotal(Trigger.new, Trigger.old,  
    Trigger.isInsert, Trigger.isUpdate, Trigger.isDelete, Trigger.isUndelete);  
}
```

##### **Step 4:**

- i. In the Developer Console window, go to the top menu and click on "File".
- ii. Select New: From the dropdown menu under "File", select "New".
- iii. Choose Apex Class: Name it as CalculateTotalAmountHandler

## MEDICAL INVENTORY MANAGEMENT

```
public class CalculateTotalAmountHandler {  
    // Method to calculate the total amount for Purchase Orders based on related Order Items  
    public static void calculateTotal(List<Order_Item__c> newItems, List<Order_Item__c>  
        oldItems, Boolean isInsert, Boolean isUpdate, Boolean isDelete, Boolean isUndelete) {  
        // Collect Purchase Order IDs affected by changes in Order_Item__c records  
        Set<Id> parentIds = new Set<Id>();  
        // For insert, update, and undelete scenarios  
        if (isInsert || isUpdate || isUndelete) {  
            for (Order_Item__c ordItem : newItems) {  
                parentIds.add(ordItem.Purchase_Order_Id__c);  
            }  
        }  
        // For update and delete scenarios  
        if (isUpdate || isDelete) {  
            for (Order_Item__c ordItem : oldItems) {  
                parentIds.add(ordItem.Purchase_Order_Id__c);  
            }  
        }  
        // Calculate the total amounts for affected Purchase Orders  
        Map<Id, Decimal> purchaseToUpdateMap = new Map<Id, Decimal>();  
        if (!parentIds.isEmpty()) {  
            // Perform an aggregate query to sum the Amount__c for each Purchase Order  
            List<AggregateResult> aggrList = [  
                SELECT Purchase_Order_Id__c, SUM(Amount__c) totalAmount  
                FROM Order_Item__c  
                WHERE Purchase_Order_Id__c IN :parentIds  
                GROUP BY Purchase_Order_Id__c  
            ];  
            // Map the result to Purchase Order IDs  
            for (AggregateResult aggr : aggrList) {  
                Id purchaseOrderId = (Id)aggr.get('Purchase_Order_Id__c');  
                Decimal totalAmount = (Decimal)aggr.get('totalAmount');  
                purchaseToUpdateMap.put(purchaseOrderId, totalAmount);  
            }  
            // Prepare Purchase Order records for update  
            List<Purchase_Order__c> purchaseToUpdate = new List<Purchase_Order__c>();  
            for (Id purchaseOrderId : purchaseToUpdateMap.keySet()) {  
                Purchase_Order__c purchaseOrder = new Purchase_Order__c(Id = purchaseOrderId,  
                    Total_Order_cost__c = purchaseToUpdateMap.get(purchaseOrderId));  
            }  
        }  
    }  
}
```

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```
    purchaseToUpdate.add(purchaseOrder);

}

// Update Purchase Orders if there are any changes
if (!purchaseToUpdate.isEmpty()) {
    update purchaseToUpdate;
}

}

}

}
```

**Save it.**

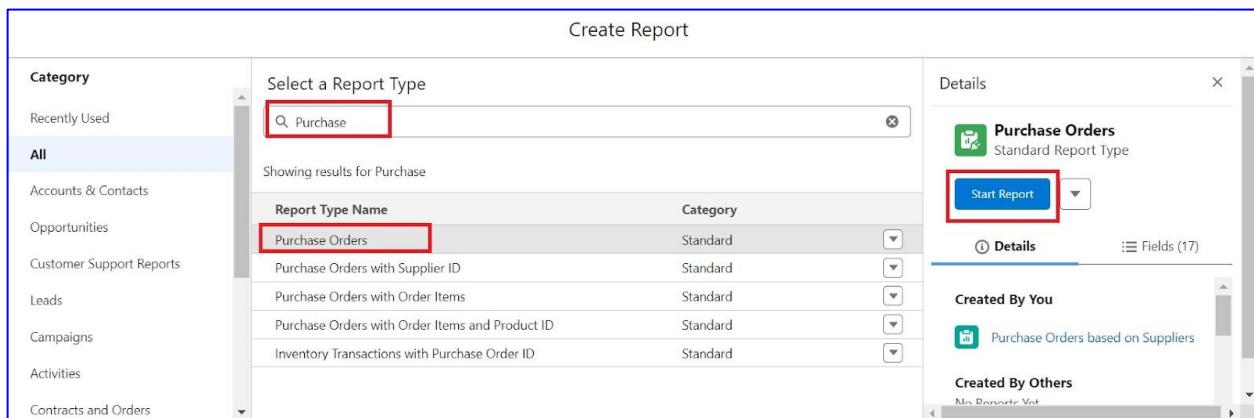
# MEDICAL INVENTORY MANAGEMENT

## Milestone-15

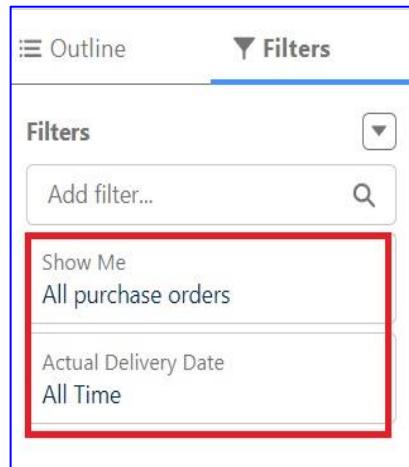
### Reports Creation

#### Activity 1: Create a Purchase Orders based on Suppliers (Summary) Report

1. Click App Launcher
2. Select Medical Inventory Management App
3. Click on Reports tab
4. Click on New Report.
5. Click the report type as **Purchase Orders** Click Start report.



6. Click on Filters and select as follows and click on Apply



7. Customize your report, in group rows select – Supplier ID, Purchase Order: Purchase Order ID, for columns Order Count, Total Order Cost (In this way we are making a Summary Report).
8. Click save and run
9. Give report name – Purchase Orders based on Suppliers.
10. Click Save

NOTE: In this report you can see your all record of the object you selected for reporting

# MEDICAL INVENTORY MANAGEMENT

(What you selects in "Select a report type option")

The screenshot shows the 'Purchase Orders based on Suppliers' report configuration. The 'Fields' section on the left is highlighted with a red box, showing 'GROUP ROWS' and 'Supplier ID'. The main report area displays a table with columns: Supplier ID, Purchase Order: Purchase Order ID, Order Count, and Total Order Cost. The table data includes records from Supplier-001 and Supplier-002, with a total of 14 orders costing ₹26,325.00. The top right of the interface has a 'Save & Run' button and an 'Update Preview Automatically' checkbox, which is checked and highlighted with a red box.

Supplier ID	Purchase Order: Purchase Order ID	Order Count	Total Order Cost
Supplier-001 (4)	Purchase-0001 (1)	3	₹2,075.00
	Purchase-0002 (1)	2	₹3,250.00
	Purchase-0003 (1)	3	₹7,000.00
	Purchase-0004 (1)	4	₹9,500.00
Supplier-002 (1)	Purchase-0005 (1)	2	₹4,500.00
Total (5)		14	₹26,325.00

## View Report

1. Click on App Launcher on the left side of the screen.
2. Search Medical Inventory Management App & click on it.
3. Click on Reports Tab.
4. Click on Purchase Orders based on Suppliers and see records.

The screenshot shows the generated 'Purchase Orders based on Suppliers' report. At the top, it displays summary statistics: Total Records (5), Total Order Count (14), and Total Total Order Cost (₹26,325.00). The main table lists purchase details by supplier and purchase order, with a total row at the bottom. The table columns are: Supplier ID, Purchase Order: Purchase Order ID, Order Count, and Total Order Cost. The data matches the configuration shown in the previous screenshot.

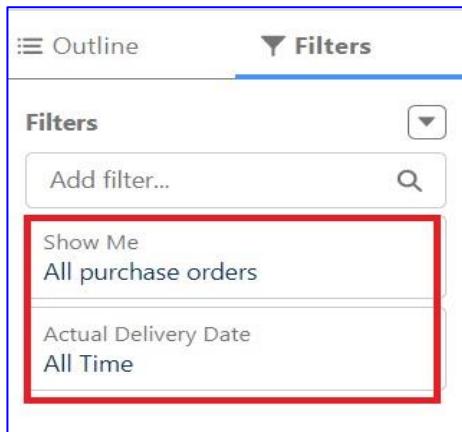
Supplier ID	Purchase Order: Purchase Order ID	Order Count	Total Order Cost
Supplier-001 (4)	Purchase-0001 (1)	3	₹2,075.00
	Purchase-0002 (1)	2	₹3,250.00
	Purchase-0003 (1)	3	₹7,000.00
	Purchase-0004 (1)	4	₹9,500.00
Supplier-002 (1)	Purchase-0005 (1)	2	₹4,500.00
Total (5)		14	₹26,325.00

## Activity 2: Create a Complete Purchase Details Report

1. Click App Launcher
2. Select Medical Inventory Management App
3. Click on Reports tab

## MEDICAL INVENTORY MANAGEMENT

4. Click on New Report.
5. Click the report type as Purchase Orders with Order Items and Product ID >> Click Start report.
6. Click on Filters and select as follows and click on Apply



7. Customize your report, in group rows select – Supplier ID, Actual Delivery Date, Purchase Order: Purchase Order ID, for columns Product ID : Product ID, Product ID : Product Name, Order Count, Quantity Received, Amount (In this way we are making a Summary Report).
8. Click save and run
9. Give report name – Complete Purchase Details Report
10. Click Save

Supplier ID	Actual Delivery Date	Purchase Order: Purchase Order ID	Product ID: Product ID	Order Count	Product ID: Product Name	Quantity Received	Amount
Supplier-001 (12)	18/06/2024 (2)	Purchase-0002 (2)	Gen-0001	2	Syringes	50	\$250.00
			Cap-0001	2	Dolo 650	150	\$3,000.00
				2		200	\$3,250.00
				2		200	\$3,250.00
	22/06/2024 (3)	Purchase-0001 (3)	Gen-0001	3	Syringes	5	\$125.00
			Gen-0001	3	Syringes	10	\$50.00
			Cap-0001	3	Dolo 650	100	\$2,000.00
				3		115	\$2,075.00
				3		115	\$2,075.00
	23/06/2024 (3)	Purchase-0003 (3)	Syr-0001	3	Calpol 120mg Syrup	100	\$4,000.00
			Cap-0001	3	Dolo 650	50	\$1,000.00
			Gen-0001	3	Syringes	400	\$2,000.00
				3		550	\$7,000.00
				3		550	\$7,000.00
	11/07/2024 (4)	Purchase-0004 (4)	Syr-0001	4	Calpol 120mg Syrup	100	\$4,000.00
			IV-0001	4	Saline	50	\$2,500.00
			Cap-0001	4	Dolo 650	100	\$2,000.00
				4	Syringes	200	\$1,000.00

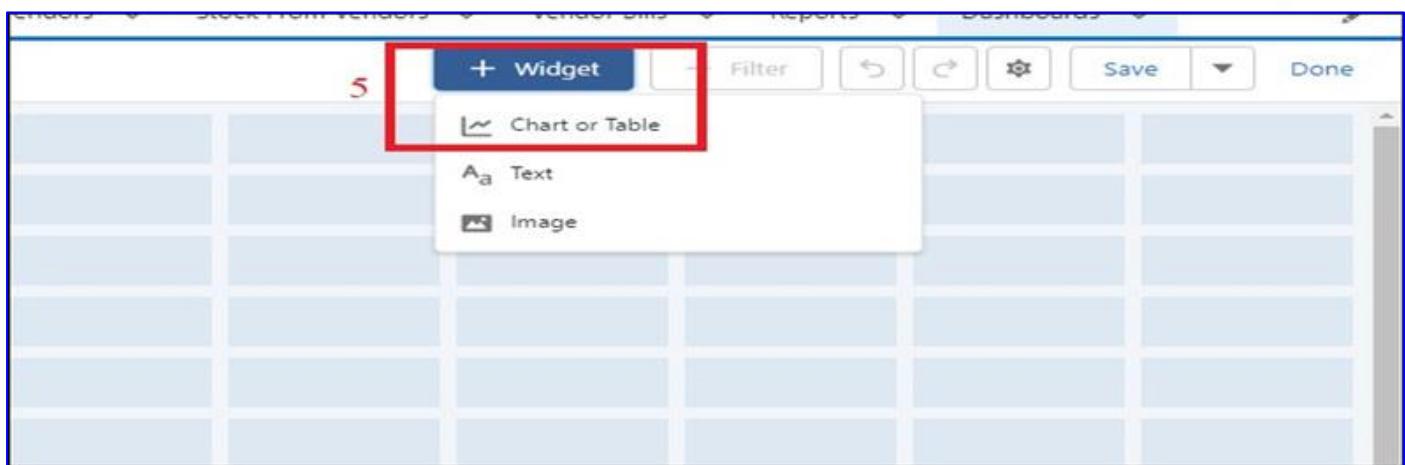
# MEDICAL INVENTORY MANAGEMENT

## Milestone-16

### Dashboards Creation

#### Activity 1: - Create Dashboard

1. Click on the Dashboards tab from the Medical Inventory Management application.
2. Click on the new dashboard.
3. Give name - **Medical Inventory DashBoard**
4. Click create
5. Click on +widget



6. Select the Purchase Orders based on Suppliers Report

Select Report

Reports

- Recent
- Created by Me
- Private Reports
- Public Reports
- All Reports

Folders

- Created by Me
- Shared with Me
- All Folders

Select Report

Q Search Reports and Folders... Reports and Folders ▾

All Folders > Private Reports

Complete Purchase Details Report  
Annapurna Gurram · 08-Jul-2024, 11:58 am · Private Reports

Purchase Orders based on Suppliers  
Annapurna Gurram · 08-Jul-2024, 11:32 am · Private Reports

Cancel Select

7. For the data visualization select any of the charts, tables etc. as per your choice/requirement

## MEDICAL INVENTORY MANAGEMENT

### Add Widget

Report  
Purchase Orders based on Suppliers

Use chart settings from report

Display As

Value  
Sum of Total Order Cost

Sliced By  
Supplier ID

Preview

Purchase Orders based on Suppliers

Sum of Total Order Cost

Supplier ID  
Supplier-001   
Supplier-002

₹26k

₹22k

₹4.5k

[View Report \(Purchase Orders based on Suppliers\)](#)

Add Widget

Title  
Purchase Orders based on Suppliers

Subtitle

Footer

Legend Position  
Right

Widget Theme  
 Light (Dashboard default)   
 Dark

Preview

Purchase Orders based on Suppliers

Sum of Total Order Cost

Supplier ID  
Supplier-001   
Supplier-002

₹26k

₹22k

₹4.5k

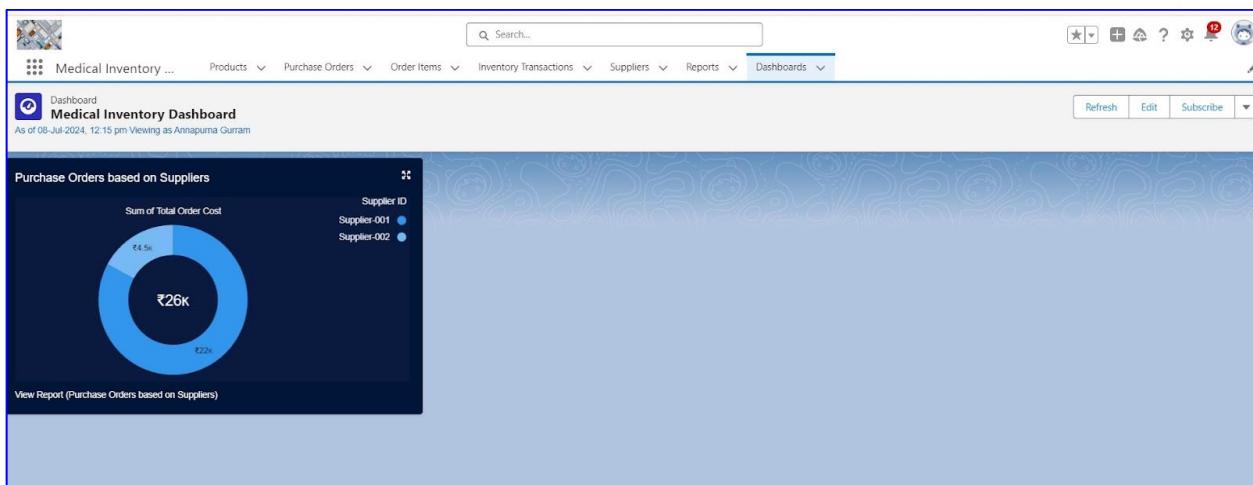
[View Report \(Purchase Orders based on Suppliers\)](#)

8. Click add.
9. Click save.

## MEDICAL INVENTORY MANAGEMENT

### Activity 2: View Dashboard

1. Click on App Launcher on the left side of the screen.
2. Search Medical Inventory Management & click on it.
3. Click on Dashboard Tab.
4. Click on **Medical Inventory DashBoard** see graph view of records



# MEDICAL INVENTORY MANAGEMENT

## OUTPUTS:

The screenshot shows the 'Products' tab in the 'Recently Viewed' section. It displays a list of three products: 'product-3', 'product-2', and 'Product - 1'. The interface includes a search bar at the top, navigation tabs like 'Purchase Orders', 'Order Items', 'Inventory Transactions', 'Suppliers', 'Reports', and 'Dashboards', and various action buttons such as 'New', 'Import', 'Change Owner', and 'Assign Label'.

Product ID	Product Name
1 product-3	cetirizine
2 product-2	
3 Product - 1	

## PRODUCTS TAB

The 'New Product' dialog box is open, showing fields for Product ID ('product-3'), Product Name ('cetirizine'), Product Description (empty), Unit Price (\$9.00), and Current Stock Level (empty). The dialog also includes 'Cancel', 'Save & New', and 'Save' buttons. A note indicates that \* = Required Information.

## NEW PRODUCT DETAILS

The screenshot shows the 'Purchase Orders' tab in the 'Recently Viewed' section. It displays a list of four purchase orders: 'P ORDER -04', 'P ORDER-01', 'P ORDER-02', and 'P ORDER - 03'. The interface is similar to the Products tab, with a search bar, navigation tabs, and action buttons.

Purchase Order ID
1 P ORDER -04
2 P ORDER-01
3 P ORDER-02
4 P ORDER - 03

## PURCHASE ORDERS TAB

## MEDICAL INVENTORY MANAGEMENT

**New Purchase Order**

\* = Required Information

Information	
*Purchase Order ID	P ORDER -04
*Supplier ID	S-102
*Order Date	5/28/2025
Expected Delivery Date	6/1/2025
Actual Delivery Date	6/1/2025
Total Order Cost	50.00

**Buttons:** Cancel, Save & New, Save

### NEW PURCHASE ORDER DETAILS

Medical Inventory ... Products Purchase Orders Order Items Inventory Transactions Suppliers Reports Dashboards

**Order Items** Recently Viewed

3 items • Updated a few seconds ago

	Order Item ID	
1	ORDER - 03	<input checked="" type="checkbox"/>
2	ORDER - 02	<input checked="" type="checkbox"/>
3	ORDER-01	<input checked="" type="checkbox"/>

### ORDER ITEMS TAB

**New Order Item**

\* = Required Information

Information	
*Order Item ID	ORDER -02
*Purchase Order ID	ORDER -02
Product details	
Product ID	product-2
Quantity Ordered	3
Quantity Received	3

**Buttons:** Cancel, Save & New, Save

### NEW ORDER ITEM DETAILS

~ 74 ~

## MEDICAL INVENTORY MANAGEMENT

### INVENTORY TRANSACTIONS TAB

### NEW INVENTORY MANAGEMENT DETAILS

### SUPPLIERS TAB

## MEDICAL INVENTORY MANAGEMENT

**New Supplier**

\* = Required Information

<b>Information</b>	
*Supplier ID S-102	
Supplier Name SRINU	
Contact Person	
*Phone Number 6767676868	
Email	
Address	<b>Cancel</b> <b>Save &amp; New</b> <b>Save</b>

## NEW SUPPLIER DETAILS

Medical Inventory ... Products Purchase Orders Order Items Inventory Transactions Suppliers Reports Dashboards

Reports Recent 3 items

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Complete Purchase Details Report		Private Reports	usha sree karapareddy	6/1/2025, 10:39 AM	<input checked="" type="checkbox"/>
Created by Me	Purchase Orders based on Suppliers		Private Reports	usha sree karapareddy	6/1/2025, 10:22 AM	<input checked="" type="checkbox"/>
Public Reports	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	4/29/2025, 1:42 AM	<input checked="" type="checkbox"/>
All Reports						<input checked="" type="checkbox"/>

## REPORTS HOME

Medical Inventory ... Products Purchase Orders Order Items Inventory Transactions Suppliers Reports Dashboards

Report: Purchase Orders  
**Purchase Orders based on Suppliers**

Total Records	Total Order Count	Total Total Order Cost	
3	3	\$110.00	
<input type="checkbox"/> Supplier ID ↑ ↓	<input type="checkbox"/> Purchase Order: Purchase Order ID ↑ ↓	Order Count ↓	Total Order Cost ↓

S-101 (3)	ORDER-01 (1)	1	\$50.00
	Subtotal	1	\$50.00
	ORDER -02 (1)	1	\$15.00
	Subtotal	1	\$15.00
	ORDER - 03 (1)	1	\$45.00
	Subtotal	1	\$45.00
	Subtotal	3	\$110.00
	Total (3)	3	\$110.00

## PURCHASE ORDERS BASED ON SUPPLIERS REPORT

# MEDICAL INVENTORY MANAGEMENT

Report: Purchase Orders with Order Items and Product ID  
**Complete Purchase Details Report**

Total Records	Total Order Count	Total Quantity Received	Total Amount
3	3	18	\$110.00

Supplier ID ↑ Actual Delivery Date ↑ Purchase Order: Purchase Order ID ↑ Product ID: Product ID ↓ Product ID: Product Name ↓ Order Count ↓ Quantity Received ↓ Amount ↓

Supplier ID	Actual Delivery Date	Purchase Order: Purchase Order ID	Product ID: Product ID	Product ID: Product Name	Order Count	Quantity Received	Amount
S-101 (3)	3/1/2025 (3)	ORDER-01 (1)	Product - 1	Sipla 10mg	1	10	\$50.00
		Subtotal			1	10	\$50.00
		ORDER - 02 (1)	product-2	paracetamol	1	3	\$15.00
		Subtotal			1	3	\$15.00
		ORDER - 03 (1)	product-3	cetirizine	1	5	\$45.00
		Subtotal			1	5	\$45.00
		Subtotal			3	18	\$110.00
		Total (3)			3	18	\$110.00

Row Counts  Detail Rows  Subtotals  Grand Total

## COMPLETE PURCHASE DETAILS REPORT

Dashboards  
**Recent**  
1 item

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Medical Inventory DashBoard		Private Dashboards	usha sree karapareddy	6/1/2025, 10:41 AM	<input checked="" type="checkbox"/>

Created by Me  
Private Dashboards  
All Dashboards

FOLDERS  
All Folders

Created by Me  
Shared with Me

FAVORITES  
All Favorites

Search recent dashboards... New Dashboard New Folder ⚙

## DASHBOARDS HOME

## MEDICAL INVENTORY MANAGEMENT

The screenshot shows a medical inventory management system interface. At the top, there's a navigation bar with links for 'Products', 'Purchase Orders', 'Order Items', 'Inventory Transactions', 'Suppliers', 'Reports', and 'Dashboards'. A search bar is also present. On the right side of the header, there are icons for refresh, edit, subscribe, and notifications (with a count of 2).

The main content area is titled 'Medical Inventory DashBoard' and shows a message: 'Last refreshed 3 days ago. Refresh this dashboard to see the latest data.' It also displays the date 'As of Jun 1, 2025, 9:52 PM-Viewing as usha sree karapareddy'.

A prominent feature is a donut chart titled 'Purchase Orders based on Suppliers' with the subtitle 'Sum of Total Order Cost'. The chart shows a single segment labeled '\$50' with a total value of '\$50'. To the right of the chart, it says 'Supplier ID S-101'. Below the chart is a link 'View Report (Purchase Orders based on Suppliers)'.

## MEDICAL INVENTORY DASHBOARD