

MEDICAL INVENTORY MANAGEMENT

TEAM ID : NM2025TMID26952

TEAM MEMBERS :

Team Leader Name : M.VISHNUDHARSANA

Email : mohankumarcovai1978@gmail.com

Team member 1 : S.KESIKA

Email : kesikak397@gmail.com

1.INTRODUCTION

1.1 Project Overview

The **Medical Inventory Management System** is a Salesforce-based application designed to streamline and manage various operational aspects of medical inventory. The system enables organizations to efficiently maintain supplier details, manage purchase orders, track product details and transactions, and monitor product expiry.

Supplier management

- Add supplier
- Maintain records

Product management

- Add product
- Track stock
- Monitor expiry

Purchase orders

- Create purchase orders
- Approval process
- Update status

Transactions

- Purchase entry
- Issue entry
- Auto update stock

Automation

- Flows
- Validation rules
- Triggers
- Scheduler

Reports&Alerts

- Email alerts
- inventory report
- supplier report

1.2 Purpose

The purpose of the **Medical Inventory Management System** is to streamline the management of suppliers, products, and purchase orders in a centralized platform. It helps track stock levels, monitor expiry dates, and automate alerts to ensure accuracy and efficiency. This reduces manual effort and improves decision-making for medical organizations.

2. DEVELOPMENT PHASE

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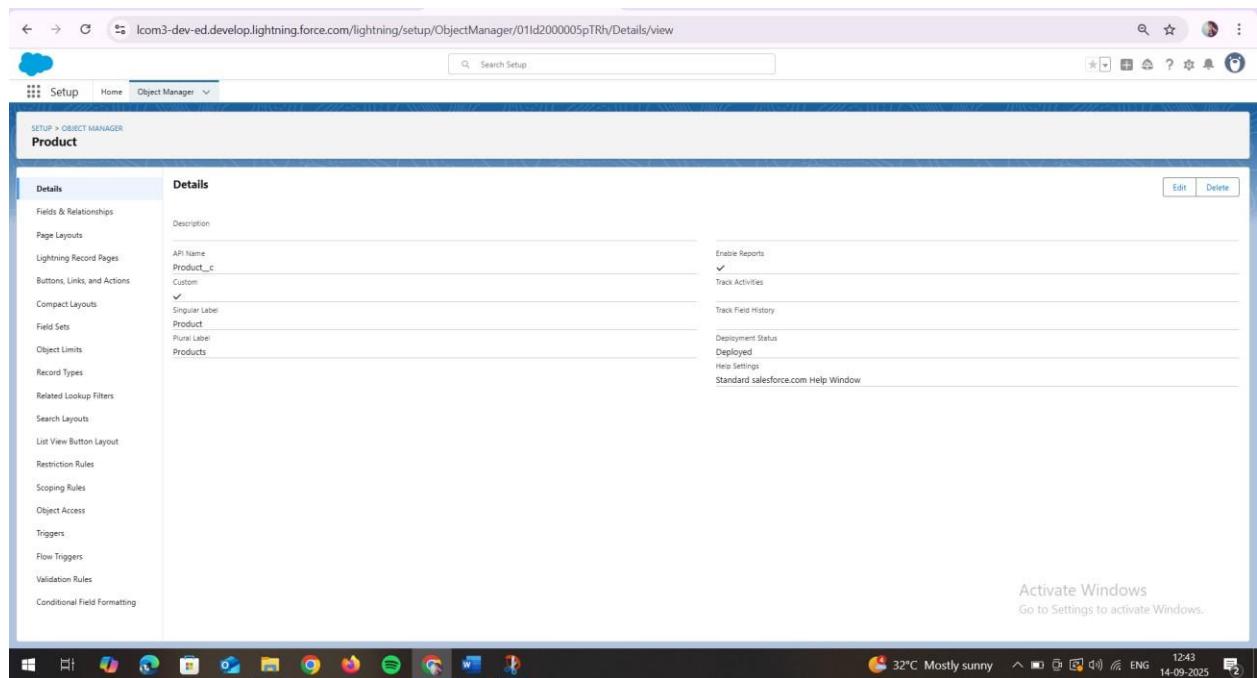
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- Created custom objects: Supplier, Product, Purchase Order, Transaction.
- **To create an object:**
 1. From the setup page
 2. Click on Object Manager
 3. Click on Create >> Click on Custom Object.
 4. Enter the label name as Product
 5. Enter Plural label name as Products
 6. Enter Record Name as Product ID
 7. Select Data Type as Text.
 8. Select Allow reports.
 9. Select Allow search.
 10. Click on Save and New and follow as it is.



orgfarm-a1f0895c61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001zw89/Details/view

The screenshot shows the Salesforce Object Manager interface for the 'Supplier' object. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is 'SETUP > OBJECT MANAGER Supplier'. On the left, a sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main 'Details' tab is selected. The API Name is set to 'Supplier_c'. Under the 'Custom' section, 'Singular Label' is 'Supplier' and 'Plural Label' is 'Suppliers'. On the right, settings include 'Enable Reports' (checked), 'Track Activities', 'Track Field History', 'Deployment Status' (set to 'Deployed'), and 'Help Settings' (link to 'Standard salesforce.com Help Window').

orgfarm-a1f0895c61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001zvOz/Details/view

The screenshot shows the Salesforce Object Manager interface for the 'Purchase Order' object. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is 'SETUP > OBJECT MANAGER Purchase Order'. The left sidebar lists the same configuration options as the Supplier screen. The main 'Details' tab is selected. The API Name is set to 'Purchase_Order_c'. Under the 'Custom' section, 'Singular Label' is 'Purchase Order' and 'Plural Label' is 'Purchase Orders'. On the right, settings include 'Enable Reports' (checked), 'Track Activities', 'Track Field History', 'Deployment Status' (set to 'Deployed'), and 'Help Settings' (link to 'Standard salesforce.com Help Window').

The screenshot shows the Salesforce Object Manager setup page for the 'Inventory Transaction' object. The left sidebar lists various configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main 'Details' tab is selected. The right panel displays the object's details, including:

Description	
API Name	Inventory_Transaction_c
Custom	✓
Singular Label	Inventory Transaction
Plural Label	Inventory Transactions
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	
Standard salesforce.com Help Window	

Buttons for 'Edit' and 'Delete' are located in the top right corner of the main panel.

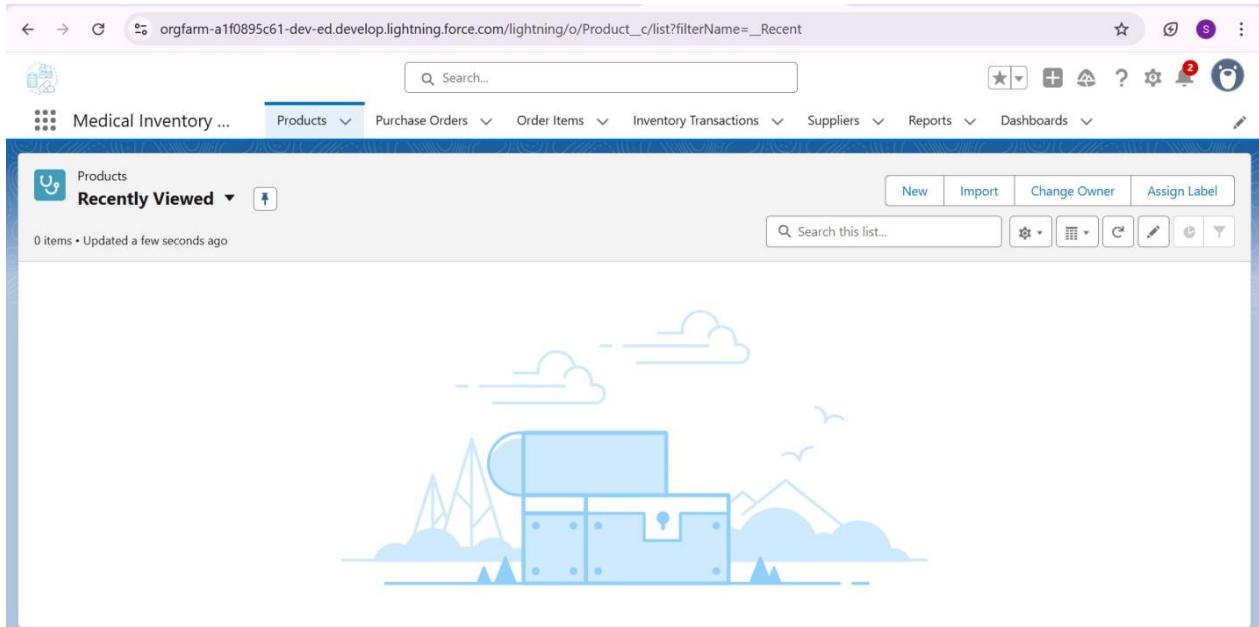
• Creating a tab for Product Object

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

Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Action	Label	Tab Style	Description
Edit Del	Inventory Transactions		Treasure chest
Edit Del	Order Items		Balls
Edit Del	Products		Stethoscope
Edit Del	Purchase Orders		Box
Edit Del	Suppliers		Hands

- **Create a Lightning App for Medical Inventory Management**
- Built a Lightning App including Supplier, Product, Purchase Order, and Transaction tabs.
- From Setup, enter App Manager in the Quick Find and select App Manager.
- Click New Lightning App.
- Enter Medical Inventory Management as the App Name >> Click on upload image and add an image related to Medical Inventory then click next
- Under App Options, leave the default selections and click next.
- Under Utility Items, leave as is and click Next.
- From Available Items, select Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards and move them to Selected Item and Click Next.
- From Available Profiles, select System Administrator and move it to Selected Profiles.
- Click Save & Finish.



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.
4. Select Fields & Relationships from the left navigation
5. Click on New
6. Select Text field, click Next
7. Enter Field Label as "Product Name" and Length 255.
8. Select Required Field.
9. Click Next, Next, then Save & New.

A screenshot of the Salesforce Setup interface. At the top, there's a navigation bar with links for Setup, Home, and Object Manager. The 'Object Manager' link is highlighted with a red box and has a red number '2' above it. Below the navigation is a search bar and a toolbar with icons for Schema Builder and Create. The main content area is titled 'Object Manager' and shows a list of objects. The 'Product' object is highlighted with a red box and has a red number '3' to its right. The list includes other objects like Fulfillment Order Product, Opportunity Product, Order Product, Product2, and ProductAttribute. Each row in the list contains columns for Label, API Name, Type, Description, Last Modified, and Deployed.

Fields & Relationships

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(50)		✓

Step 1 of 4

Select a field type:

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

Next Cancel

Step 2 of 4

Step 2. Enter the details

Field Label: **Product Name** i **7**

Please enter the maximum length for a text field below.

Length: **255** **7**

Field Name: **Product** i

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 i

Previous **Next** Cancel **9**

Activity 2: Creating a TextArea 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.
4. Select Fields & Relationships from the left navigation

5. Click on New
6. Select TextArea field, click Next
7. Enter Field Label as “Product Description” .
8. Click Next, Next, then Save & New.

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

- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area **6**
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) **7**
- Time
- URL

Next Cancel

Step 2. Enter the details **Step 2 of 4**

Previous **Next** Cancel

Field Label	Product Description 7	8
Field Name	Product_Description	
Description		
Help 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 8	
Default 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>		

Activity 3: Creating a Number 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 “Number” and click Next.
5. Enter Field Label as “ Current Stock Level”.
6. Length - 18, Decimal Places - 0.
7. Click on Next, Next and Save.

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	Decimal Places 0
Number of digits to the left of the decimal point	
Number of digits to the right of the decimal point	

Field Name **Current_Stock_Level** 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

7

Activity 4: 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.
8. Click on Next, Next and Save.

Step 2. Enter the details Step 2 of 4

Field Label **Unit Price** 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 16	Decimal Places 2
Number of digits to the left of the decimal point	
Number of digits to the right of the decimal point	

Field Name **Unit_Price** 6

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 7

8

Activity 5 : 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.
5. Select the related object “ Supplier”.
6. Click on Next.
7. Give Field Label as “Supplier ID” .
8. Select Required Field.
9. Click on Next , Next, Next , Save.

The screenshot shows the Salesforce setup interface for creating a new relationship field. The steps are numbered 4 through 9, corresponding to the list above.

Step 1: Data Type

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

Data Type

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

Step 2: Choose the related object

Select the other object to which this object is related.

Related To: 5

Step 3: Field Definition

Field Label: 7

Field Name: 9

Description:

Help Text:

Step 4: Child Relationship Options

Child Relationship Name: 8

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

What to do if the lookup record is deleted?

- Clear the value of this field. You can't choose this option if you make this field required.
- Don't allow deletion of the lookup record that's part of a lookup relationship.

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

Activity 6: 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”.
6. Click on Next, Next and Save.

Step 2. Enter the details

Step 2 of 4

Field Label 5

Field Name

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 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.FieldName__c}

Activity 7: 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.
5. Enter Field Label as “ Order Count”.
6. Choose the Summarized Object as “Order Items”.
7. For Select Roll-Up Type select “Count”.
8. Click on Next, Next and Save.

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.

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

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 Purchase Order
Summarized Object **6**

Select Roll-Up Type

COUNT **7**
 SUM
 MIN
 MAX

Field to Aggregate

Filter Criteria

All records should be included in the calculation
 Only records meeting certain criteria should be included in the calculation

Required information **8**

Previous Next Cancel

Activity 8: Creating a Unit Price 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 Unit Price.
6. Select formula return type Currency, Click Next
7. Create and insert Advance formula: Product_ID__r.Unit_Price__c
8. Click Next, Next, then Save.

Step 2. Choose output type

Field Label **Unit Price** **5** Field Name **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 **6** 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 datetime, for example, by adding a number of hours or days to another datetime.
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.

New Custom Field

Step 3. Enter formula

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: `Gross Margin = Amount - Cost_c` [More Examples...](#)

Simple Formula Advanced Formula

Insert Field Insert Operator **7**

Unit Price (Currency) = **8**

Functions

-- All Function Categories --

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Quick Tips

- Getting Started
- Operators & Functions

Activity 9: 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.

The screenshot shows the Formula Editor interface. At the top, there are tabs for "Simple Formula" and "Advanced Formula", with "Simple Formula" selected. Below the tabs is an "Insert Field" button and an "Insert Operator" dropdown menu. The main area contains the formula: "Amount (Currency) = Quantity_Received__c * Unit_Price__c". To the right of the formula is a "Functions" panel with a dropdown menu set to "All Function Categories". The panel lists several functions: ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, with "Insert Selected Function" at the bottom. A red box highlights the formula input field, and the number "7" is written below it.

Activity 10: 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

7. Click on Next, Next and Save.

The screenshot shows the "Step 2. Enter the details" screen for creating a picklist field. At the top, it says "Step 2 of 4" and has "Previous", "Next", and "Cancel" buttons. The "Next" button is highlighted with a red box and the number "7" is written next to it. The "Field Label" field is set to "Transaction Type" with a red box around it and the number "5" written below it. The "Values" section has a radio button for "Enter values, with each value separated by a new line" selected, with a red box around it and the number "6" written below it. Below this, the values "Receipt", "Issue", and "Adjustment" are listed in a text area. There are also three checkboxes at the bottom of the values section: "Display values alphabetically, not in the order entered", "Use first value as default value", and "Restrict picklist to the values defined in the value set". The "Field Name" field is set to "Transaction_Type" and the "Description" field is empty. A "OneDrive - Personal Online" link is visible in the bottom right corner.

Activity 11: 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
7. Create and insert Advance formula: Purchase_Order_ID__r.Total_Order_Cost__c
8. Click Next, Next, then Save.

Activity 11: 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
7. Create and insert Advance formula: Purchase_Order_ID__r.Total_Order_Cost__c
8. Click Next, Next, then Save.

Activity 12: 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.
7. Click on Next, Next and Save.

Step 2. Enter the details Step 2 of 4

Field Label: Phone Number 5

Field Name: Phone_Number

Description:

Help Text:

Required: Always require a value in this field in order to save a record 6

Auto add to custom report type: Add this field to existing custom report types that contain this entity 7

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__mdf.RecordAPIName.Field__c

Activity 13: 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”.
6. Click on Next, Next and Save.

Step 2. Enter the details Step 2 of 4

Field Label Email 5

Field Name Email 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 []

Default Value Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes

Updating 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.

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Buttons	Last Modified By	Product ID
Quick Actions	Minimum Stock Level	Product Name
Mobile & Lightning Actions	Created By	Owner
Expanded Lookups	Current Stock Level	Unit Price
Related Lists	Product Description	
Report Charts		

Information (Header visible on edit only)

Product ID	Sample Text	Unit Price	₹123.45
Product Name	Sample Text	Current Stock Level	12,420
Product Description	Sample Text	Minimum Stock Level	21,114
		Owner	Sample Text

System Information (Header visible on edit only)

Created By	Sample Text	Last Modified By	Sample Text
------------	-------------	------------------	-------------

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

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists
- Report Charts

Quick Find Field Name

Section	Last Modified By	Owner
Blank Space	Purchase Order ID	
Actual Delivery Date	Last Modified By	Purchase Order ID
Created By	Order Count	Supplier ID
		Order Date
		Total Order Cost

|| Information (Header visible on edit only)

- * Purchase Order ID Sample Text
- * Supplier ID Sample Text
- * Order Date 07/07/2024
- Expected Delivery Date 07/07/2024

Actual Delivery Date 07/07/2024
Order Count 36,243
Total Order Cost ₹123.45
Owner Sample Text

|| System Information (Header visible on edit only)

Created By Sample Text

Last Modified By Sample Text

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.

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

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

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

Section	Last Modified By	Quantity Ordered
Blank Space	Order Item ID	Quantity Received
Amount	Product ID	Unit Price
Created By	Purchase Order ID	

|| 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	Quantity Ordered	23,712
Unit Price	₹123.45	Quantity Received	33,407

|| System Information (Header visible on edit only)

Created By Sample Text

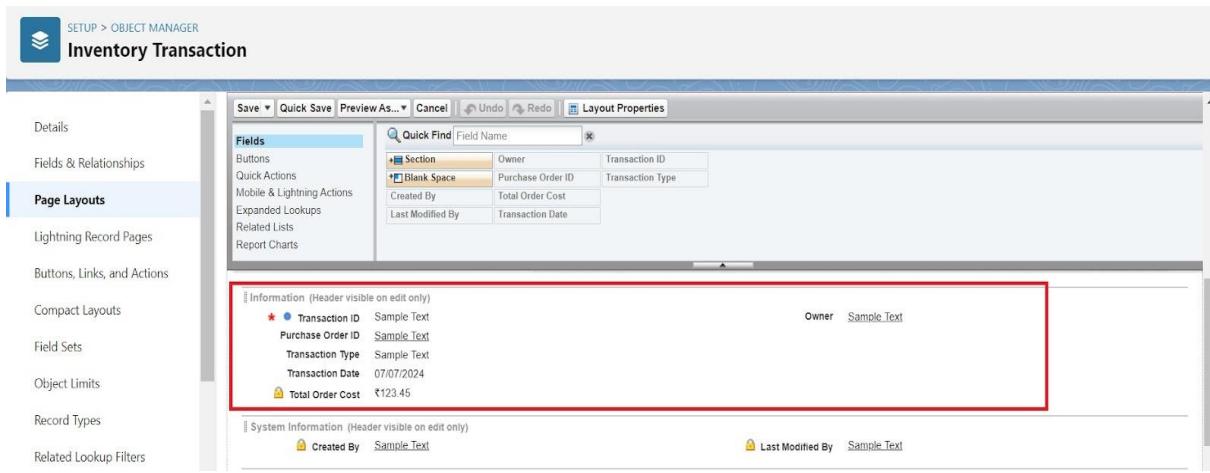
Last Modified By Sample Text

|| Custom Links (Header visible on edit only)

4. Click Save.

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

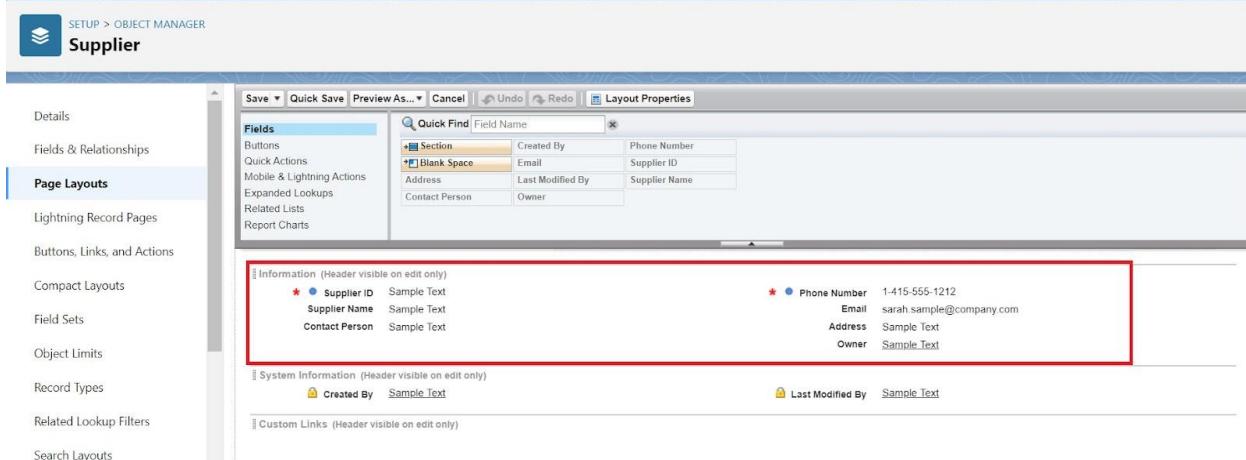
1. Go to setup >> click on Object Manager >> type object name(Inventory Transaction) in quick find box >> click on the Inventory Transaction object >> Page Layouts.
2. Click on the Inventory Transaction Layout
3. Drag and Arrange the field as shown below



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.

Compact Layouts

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

SETUP > OBJECT MANAGER
Product

Compact Layouts
1 items, Sorted by Label

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
System Default	SYSTEM			

Quick Find New Compact Layout Assignment

Enter Compact Layout Information

Label 4
Name

Select Compact Layout Fields

Available Fields: Created By, Last Modified By, Minimum Stock Level, Owner, Product ID

Selected Fields: Product Name, Unit Price, Current Stock Level 5

Top, Up, Down, Bottom

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

Save Cancel 6

Product Compact Layouts Compact Layout Assignment

Save Cancel

Primary Compact Layout

Select the compact layout to use when this object's records appear as list items in the mobile app.

Primary Compact Layout: 9

Save Cancel 10

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

Compact Layout Edit

Enter Compact Layout Information

Label: Purchase Order Compact L **4**
Name: Purchase_Order_Compact

Select Compact Layout Fields

Available Fields: Actual Delivery Date, Created By, Expected Delivery Date, Last Modified By, Owner, Order Count

Selected Fields: Purchase Order ID, Order Date, Total Order Cost, Supplier ID **5**

Add, Remove, Top, Up, Down, Bottom

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

Save **6** **Cancel**

Purchase Order Compact Layouts Compact Layout Assignment

Primary Compact Layout

Select the compact layout to use when this object's records appear as list items in the mobile app.

Primary Compact Layout: Purchase Order Compact Layout **9**

Save **10** **Cancel**

Validation Rules

Activity 1: To create an Expected Delivery Date Validation rule to a Employee 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

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, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit	<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="Cancel"/>
Rule Name	Expected_Delivery_Date_Validation 3
Active	<input checked="" type="checkbox"/>
Description	4
Error Condition Formula Example: <input type="text" value="Discount_Percent_c>0.30"/> More Examples... Display an error if Discount is more than 30% If this formula expression is true, display the text defined in the Error Message area <input type="button" value="Insert Field"/> <input type="button" value="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:
 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	<input checked="" type="radio"/> Top of Page <input type="radio"/> Field 7
8 <input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="Cancel"/>	

Profiles

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.

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/>	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/>	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Standard User 8	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	System Administrator	Salesforce	<input type="checkbox"/>

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	Inventory Manager

Save **Cancel**

2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the Medical Inventory Management.

Custom App Settings			
Visible	Default	Visible	Default
<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="radio"/>	Service Console (standard__LightningService)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="radio"/>	Site.com (standard__Sites)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="radio"/>	Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="radio"/>		
<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"/>						
Order Items	<input checked="" type="checkbox"/>						
Products	<input checked="" type="checkbox"/>						
	Basic Access						Data Administration
	Read	Create	Edit	Delete	View All	Modify All	
Purchase Orders	<input checked="" type="checkbox"/>						
Suppliers	<input checked="" 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
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"/> i

Save **Save & New** **Cancel**

Activity 2: To create an Purchase Manager Profile

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

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

Set the permissions and page layouts for this profile.

Profile Edit

Name	Purchase Manager	Save	Save & New	Cancel
User License	Salesforce			
Description				Custom Profile ✓

Custom App Settings Required Information

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

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

Custom Object Permissions	Basic Access				Data Administration		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"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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
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"/> i

Save **Save & New** **Cancel**

Roles

- Created roles to define data visibility across users.
- Go to quick find >> Search for Roles >> click on Set Up Roles.

lcom3-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00ed200000Aoj7R

SETUP Profiles

Q prof

Users Profiles Purchase Manager

Didn't find what you're looking for?
Try using Global Search.

Name: Purchase Manager
User License: Salesforce
Description:
Created By: Dhanashri L 12/09/2025, 11:19 pm
Modified By: Dhanashri L 13/09/2025, 11:04 am

Profile Detail

Custom Profile	
Location Group Assignment	Location Group Assignment Layout [View Assessment]
Metric	Metric Layout [View Assessment]
Object Milestone	Object Milestone Layout [View Assessment]
Operating Hours	Operating Hours Layout [View Assessment]
Opportunity	Opportunity Layout [View Assessment]
Opportunity Product	Opportunity Product Layout [View Assessment]
Order	Order Layout [View Assessment]
Order Product	Order Product Layout [View Assessment]
Payment	Payment Layout [View Assessment]
Payment Authorization	Payment Authorization Layout [View Assessment]
Payment Authorization Adjustment	Payment Authorization Adjustment Layout [View Assessment]
Payment Gateway	Payment Gateway Layout [View Assessment]
Payment Gateway Log	Payment Gateway Log Layout [View Assessment]

Page Layouts

Standard Object Layouts	Global	Global Layout [View Assessment]
Email Application	Global	Global Layout [View Assessment]
Home Page Layout	DE Default	DE Default Layout [View Assessment]
Account	Account Layout [View Assessment]	Account Layout [View Assessment]
Alternative Payment Method	Alternative Payment Method Layout [View Assessment]	Alternative Payment Method Layout [View Assessment]
Appointment Invitation	Appointment Invitation Layout [View Assessment]	Appointment Invitation Layout [View Assessment]
Asset	Asset Layout [View Assessment]	Asset Layout [View Assessment]
Asset Action	Asset Action Layout [View Assessment]	Asset Action Layout [View Assessment]
Asset Action Source	Asset Action Source Layout [View Assessment]	Asset Action Source Layout [View Assessment]
Asset Relationship	Asset Relationship Layout [View Assessment]	Asset Relationship Layout [View Assessment]
Asset State Period	Asset State Period Layout [View Assessment]	Asset State Period Layout [View Assessment]
Assigned Resource	Assigned Resource Layout [View Assessment]	Assigned Resource Layout [View Assessment]
Associated Location	Associated Location Layout [View Assessment]	Associated Location Layout [View Assessment]

Activate Windows
Go to Settings to activate Windows.

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.

Activity 2 : 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 labeled 'Q: roles' and a 'Users' section with a 'Roles' item highlighted. The main content area is titled 'Understanding Roles' with a sub-section 'Sample Role Hierarchy'. A diagram illustrates a hierarchy from 'Executive Staff' down to 'Western Sales Rep' and 'Eastern Sales Rep'. The 'Executive Staff' node includes a note: 'View & edit data, roll up forecasts, & access reports for all users below this level. Can't access data of other Executive Staff'. The 'Western Sales Director' and 'Eastern Sales Director' nodes both have notes: 'View & edit data, roll up forecasts, & access reports for all users directly below this level. Can't access data of other users at same level'. The 'Western Sales Rep' and 'Eastern Sales Rep' nodes both have notes: 'View & edit data, roll up forecasts, & access reports only for own data. Can't access data of users above or at same level'. At the bottom right are 'Set Up Roles' and 'Don't show this page again' buttons.

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 a 'New Role'. The title is 'Role Edit' and the sub-section is 'New Role'. The form fields are as follows:

- Label:** Inventory Manager
- Role Name:** Inventory_Manager
- This role reports to:** SVP, Sales & Marketing
- Role Name as displayed on reports:** (empty field)

 The 'Label' and 'Role Name' fields are highlighted with a red border. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons, with 'Save' also highlighted with a red border.

Permission Sets

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. In the top navigation bar, 'Setup' is selected. The left sidebar has 'Permission Sets' highlighted with a red box. The main content area is titled 'Permission Sets' and contains a table of existing permission sets. A red box highlights the 'New' button at the top of the table. The table columns are 'Action', 'Permission Set Label', 'Description', and 'License'. The 'Permission Set Label' column contains labels like 'Buyer', 'Buyer Manager', 'C360 High Scale Flow Integration User', etc. The 'Description' column provides a brief overview of each permission set's features. The 'License' column lists the specific licenses required for each set.

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

The screenshot shows the 'Create Permission Set' page. The 'Label' field is populated with 'Purchase Manager Create Access' and the 'API Name' field is populated with 'Purchase_Manager'. The 'Save' button is highlighted with a red box. The page also includes fields for 'Description' and 'Session Activation Required'.

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

The screenshot shows the 'Permission Sets' page for a permission set named 'Purchase Manager Create Access'. The 'Order Items' tab is selected. A red box highlights the 'Visible' checkbox under 'Tab Settings' and the 'Enabled' checkboxes under 'Object Permissions' for the 'Edit' and 'Modify All' actions.

4. 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 'Manage Assignment Expiration' page for the 'Purchase Manager Create Access' permission set. Under 'Select Users to Assign', the 'Active Users' section is shown. A red box highlights the row for 'John PurchaseM', which has a checked checkbox in the first column. 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		<input checked="" type="checkbox"/>	System Administrator
Chatter Expert	Chatter	chatty.00dd0000058bqluaa.yrgohck7wjvo@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Integration User	integ	integration@00dd0000058bqluaa.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
John PurchaseM	jpurc	john@purchasem.com	Purchasing Manager	<input checked="" type="checkbox"/>	Purchase Manager
Security User	sec	insightssecurity@00dd0000058bqluaa.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

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

... > PERMISSION SET 'PURCHASE MANAGER CREATE ACCESS' > MANAGE ASSIGNMENT EXPIRATION

Purchase Manager Create Access

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...

Selected Users

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

Flows

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 .

New Flow

Select how you'd like to start building your automation.

 Start From Scratch
Select your automation type and start building on an empty canvas.

 Use a Template
Select a pre-built flow and customize it to fit your needs.

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

New Flow

Core All + Templates

- Screen Flow
- Record-Triggered Flow 2
- Schedule-Triggered Flow
- Platform Event—Triggered Flow
- Autolaunched Flow (No Trigger)
- Record-Triggered Orchestration

Create

The screenshot shows the 'New Flow' interface. Under the 'Core' tab, there are six flow types listed: Screen Flow, Record-Triggered Flow, Schedule-Triggered Flow, Platform Event—Triggered Flow, Autolaunched Flow (No Trigger), and Record-Triggered Orchestration. The 'Record-Triggered Flow' option is highlighted with a red border and a red number '2' in the top right corner of its box. Below the list is a blue 'Create' button.

3. Under Object select “Purchase Order”
4. Select A record is created or updated

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object 3

Configure Trigger

* Trigger the Flow When:

A record is created

A record is updated

A record is created or updated 4

A record is deleted

The screenshot shows the configuration steps for a flow. It starts with 'Configure Start' where the user selects the 'Object' as 'Purchase Order'. Then it moves to 'Configure Trigger' where the user selects 'Trigger the Flow When' as 'A record is created or updated'. Step 3 is highlighted with a red box around the 'Object' input field, and step 4 is highlighted with a red box around the selected radio button.

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.

6

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)

For the first condition select as follows:

Field: Id

Operator: Equals

Value: {!\$Record.Id}

The screenshot shows the configuration for a 'Get Records' component. The 'Label' field is set to 'Get Purchase Record' (highlighted by a red box with number 8). The 'API Name' field is set to 'Get_Purchase_Record'. The 'Object' field is set to 'Purchase Order' (highlighted by a red box with number 9). Below these, there is a section titled 'Filter Purchase Order Records' (highlighted by a red box with number 10) which contains a condition requirement: 'All Conditions Are Met (AND)'. It includes fields for 'Field' (Id), 'Operator' (Equals), and 'Value' (\$Record > Record ID).

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

Field: Order_Date__c (highlighted by a red box)

+ Add Field

13. 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.
14. Enter API name as ActualDeliveryDate >> Select Data type as Date >> Click on Done.

15. From the Toolbox drag and drop Assignment element.
16. Enter the label as “Assignment”.
17. Set Variable Values:

a) Variable : { !ActualDeliveryDate }

Operator : Equals

Value : { !\$Record.Order_Date__c }

b) Variable : { !ActualDeliveryDate }

Operator : Add

Value : 3

The screenshot shows the configuration of an Assignment element. At the top, there are fields for 'Label' (Assignment), 'API Name' (Assignment_1), and a large 'Description' area which is currently empty. Below this, the 'Set Variable Values' section contains two entries. Each entry has three fields: 'Variable' (ActualDeliveryDate), 'Operator' (Equals or Add), and 'Value' (\$Record > Order Date or 3). The entire 'Set Variable Values' section is highlighted with a red border. At the bottom left, there is a button labeled '+ Add Assignment'.

Variable	Operator	Value
ActualDeliveryDate	Equals	\$Record > Order Date
ActualDeliveryDate	Add	3

18. Click Done
19. From the Toolbox drag and drop Update Records element and connect to the Assignment element.
20. Enter the label as “Updating Purchasing Order”.

21. How to Find Records to Update and Set Their Values : Use the Purchase Order record that triggered the flow
22. Set Filter Conditions : None -Always Update Record
23. Set Field Values for the Trip Record as

Field : Actual_Delivery_Date__c

Value : {!ActualDeliveryDate}

*** 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

Set Filter Conditions

Condition Requirements to Update Record

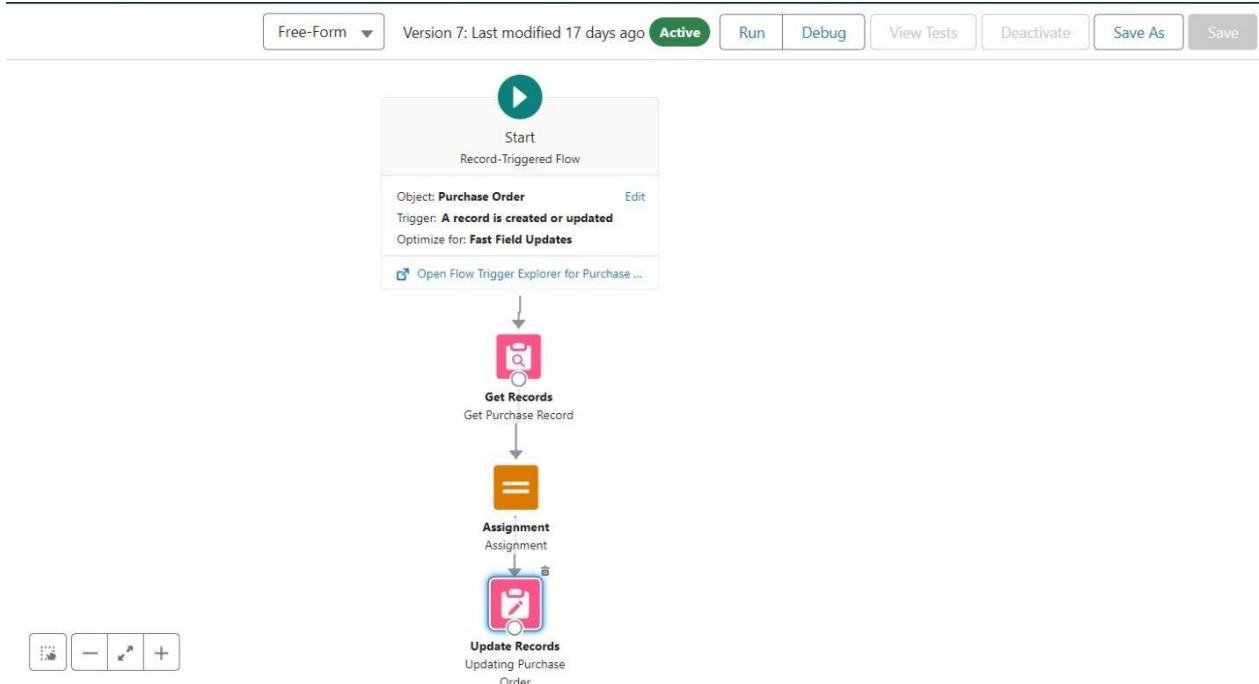
None—Always Update Record

Set Field Values for the Purchase Order Record

Field	Value
Actual_Delivery_Date__c	{!ActualDeliveryDate}

+ Add Field

24. Click Done
25. Save the flow as “Actual Delivery Date Updating”.
26. Activate the flow.



Triggers

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.

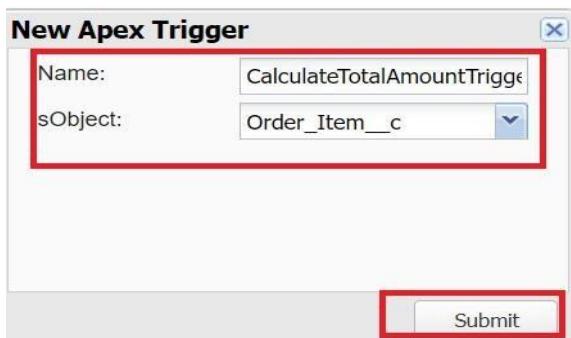
ii) Click on Developer Console: Click on the "Developer Console" option from the Setup menu. This will open the Developer Console in a new browser tab or window.

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

```
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));

    purchaseToUpdate.add(purchaseOrder);

}

// Update Purchase Orders if there are any changes

if (!purchaseToUpdate.isEmpty()) {

    update purchaseToUpdate;

}

}

}

```

Save it.

Reports

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.

Create Report

The screenshot shows the 'Create Report' interface. On the left, there's a sidebar with categories like 'Recently Used' and 'All'. Under 'All', items like 'Accounts & Contacts', 'Opportunities', and 'Contracts and Orders' are listed. The main area has a search bar 'Select a Report Type' with 'Purchase' typed in. Below it, a list of report types is shown, with 'Purchase Orders' selected. To the right, a 'Details' panel is open for 'Purchase Orders', showing a 'Start Report' button highlighted with a red box. Other sections include 'Created By You' and 'Created By Others'.

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

The screenshot shows the 'Filters' section. It has a 'Filters' button and a 'Show Me' dropdown. Under 'Show Me', 'All purchase orders' is selected. Below it, 'Actual Delivery Date' and 'All Time' are also listed, all enclosed in a red box.

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

(What you selects in “Select a report type option”)

The screenshot shows the report configuration interface for "Purchase Orders based on Suppliers". The interface includes:

- Fields:** Groups section with "Supplier ID" and "Purchase Order: Purchase Order ID" selected as group rows; Columns section with "# Order Count" and "# Total Order Cost" selected.
- Report Preview:** A table showing data grouped by Supplier ID. The table has columns: Supplier ID, Purchase Order: Purchase Order ID, Order Count, and Total Order Cost.
- Buttons:** Save & Run (highlighted with a red box), Save, Close, Run, and Update Preview Automatically (highlighted with a red box).
- Toolbar:** Includes icons for search, add chart, reports, dashboards, and other app functions.

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.

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
5	14	₹26,325.00
<input type="checkbox"/> Supplier ID ↑ ↴ <input type="checkbox"/> Purchase Order: Purchase Order ID ↑ ↴ <input type="checkbox"/> Order Count ↴ <input type="checkbox"/> Total Order Cost ↴		
<input type="checkbox"/> 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 <input type="checkbox"/> Supplier-002 (1) Purchase-0005 (1) 2 ₹4,500.00 Total (5) 14 ₹26,325.00		

Row Counts Detail Rows Subtotals Grand Total

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

Reports
Recent
3 items

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Purchase Orders based on Suppliers	Private Reports	Dharshana L	Dharshana L	13/9/2025, 2:55 pm	<input type="checkbox"/>
Created by Me	Complete Purchase Details Report	Private Reports	Dharshana L	Dharshana L	13/9/2025, 3:15 pm	<input type="checkbox"/>
Private 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	18/8/2025, 12:50 pm	<input type="checkbox"/>

RECENTLY USED REPORTS

Activate Windows
Go to Settings to activate Windows.

Windows Taskbar icons: Start, File Explorer, Mail, Photos, OneDrive, Edge, Google Chrome, Spotify, Microsoft Teams, File Explorer, Task View, Task Manager, Power User, Taskbar settings.

System tray icons: Battery (33°C, Mostly sunny), Network, Volume, Language (ENG), Date (14-09-2025), Time (14:18).

Report: Purchase Orders
Purchase Orders based on Suppliers

Total Records: 4

Supplier ID	Purchase Order: Purchase Order ID	Order Count	Total Order Cost	Total
PR001	PR001	0	0	1
PR002	PR002	1	0	1
PR003	PR003	1	0	1
PR001	PR001	1	0	1
Total		3	1	4

Details (4 Rows) Click an intersection in the table above to filter details.

Purchase Order: ID	Actual Delivery Date	Expected Delivery Date	Order Date	Purchase Order ID	Purchase Order: Owner Name	Purchase Order: Owner Alias	Purchase Order: Owner Role	Purchase Order: Created By	Purchase Order: Created Alias	Purchase Order: Created Date	Purchase Order: Status
1 a0Ad2000002gjTJ	12/09/2025	15/09/2025	09/09/2025	PR002	Dharshana L	DL	-	Dharshana L	DL	14/09/2025	Open
2 a0Ad2000002gjRh	13/09/2025	16/09/2025	10/09/2025	-	Dharshana L	DL	-	Dharshana L	DL	14/09/2025	Open
3 a0Ad2000002gjUv	12/09/2025	-	09/09/2025	-	Dharshana L	DL	-	Dharshana L	DL	14/09/2025	Open
4 a0Ad2000002gjR	12/09/2025	-	09/09/2025	-	Dharshana L	DL	-	Dharshana L	DL	14/09/2025	Open
5											

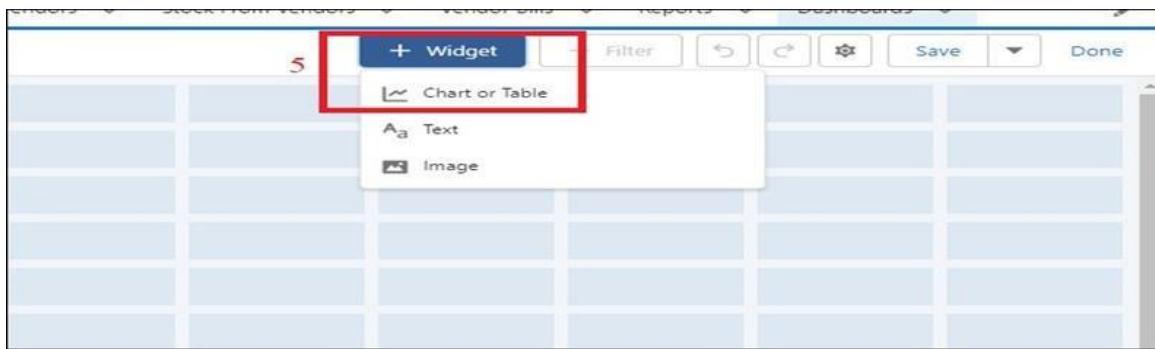
Activate Windows
Go to Settings to activate Windows.

Row Counts Detail Rows Subtotal Grand Total Stacked Summaries

Dashboards

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
7. For the data visualization select any of the charts, tables etc. as per your choice/requirement
8. Click add.
9. Click save.



Select Report

Reports

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

Folders

- Created by Me
- Shared with Me
- All Folders

Select Report

Search 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

A screenshot of a 'Select Report' dialog. On the left, there are sections for Reports (Recent, Created by Me, etc.) and Folders (All Folders). In the center, a report titled 'Purchase Orders based on Suppliers' is listed under 'Private Reports'. This report is highlighted with a red box. At the bottom right of the dialog are 'Cancel' and 'Select' buttons, with 'Select' also having a red border.

Add Widget

Report

Purchase Orders based on Supplie X

Use chart settings from report (i)

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

₹4.5k

₹22k

View Report (Purchase Orders based on Suppliers)

Cancel Add

A screenshot of an 'Add Widget' dialog. On the left, there are settings for the report: 'Purchase Orders based on Supplie' (with an 'X' button), a checkbox for 'Use chart settings from report', and a 'Display As' section with various chart icons. Below these are 'Value' and 'Sliced By' fields, both containing 'Supplier ID'. On the right, there's a preview of a donut chart titled 'Purchase Orders based on Suppliers'. The chart shows the sum of total order cost for two suppliers: Supplier-001 and Supplier-002. At the bottom right of the dialog are 'Cancel' and 'Add' buttons, with 'Add' also having a blue border.

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	Value
Supplier-001	₹4.5k
Supplier-002	₹22k

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

Cancel
Add

FUNCTIONAL AND PERFORMANCE TESTING

- Tested validation rules by attempting invalid inputs.
- Verified trigger functionality with duplicate product entries.
- Confirmed flows run automatically on stock and expiry events.
- Validated approval processes with email notifications.

RESULTS

- Tabs displayed for Supplier, Product, Purchase Order, Transaction.
- Email alerts for approvals, rejections, and expiry reminders.
- Trigger error messages shown on duplicate entries.
- Flow executions successfully performed.

lcom3-dev-ed.lightning.force.com/lightning/r/Report/00Od200000B3HM9EAN/view?queryScope=userFolders

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

Report: Purchase Orders
Purchase Orders based on Suppliers

Total Records 4

Supplier ID	Purchase Order: Purchase Order ID	Order Count	Total Order Cost	Total
PR001	PR001	0	0	1
PR002	PR002	1	0	1
PR003	PR003	1	0	1
PR001	PR001	1	0	1
Total		Record Count	3	1

Details (4 Rows) Click an intersection in the table above to filter details.

Purchase Order: ID	Actual Delivery Date	Expected Delivery Date	Order Date	Purchase Order ID	Purchase Order: Owner Name	Purchase Order: Owner Alias	Purchase Order: Owner Role	Purchase Order: Created By	Purchase Order: Created Alias	Purchase Order: Created Date	Purchase Order: Last Modified By
1 a0Ad2000002gjTJ	12/09/2025	15/09/2025	09/09/2025	PR002	Dharshana L	DL	-	Dharshana L	DL	14/09/2025	Dharshan
2 a0Ad2000002gjRb	15/09/2025	16/09/2025	10/09/2025	-	Dharshana L	DL	-	Dharshana L	DL	14/09/2025	Dharshan
3 a0Ad2000002gjUv	12/09/2025	-	09/09/2025	-	Dharshana L	DL	-	Dharshana L	DL	14/09/2025	Dharshan
4 a0Ad2000002gjUR	12/09/2025	-	09/09/2025	-	Dharshana L	DL	-	Dharshana L	DL	14/09/2025	Dharshan
5											

Activate Windows
Go to Settings to activate Windows.

Row Counts Detail Rows Subtotal Grand Total Stacked Summaries

Windows Taskbar: 32°C Mostly sunny 14:19 14-09-2025

lcom3-dev-ed.lightning.force.com/lightning/r/Dashboard/01Zd2000003T63VEAS/view?queryScope=userFolders

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

Dashboard Medical Inventory Dashboard As of 14-Sept-2025, 11:55 am Viewing as Dharshana L

Purchase Orders based on Suppliers

View Report (Purchase Orders based on Suppliers)

As of 14-Sept-2025, 11:55 am

Supplier ID: Dharshana Lakshmanasamy

Sum of Order Count: 4

Complete Purchase Details Report

View Report (Complete Purchase Details Report)

As of 14-Sept-2025, 11:55 am

Supplier ID: Dharshana Lakshmanasamy

Sum of Order Count: 1

Activate Windows
Go to Settings to activate Windows.

Windows Taskbar: 32°C Mostly sunny 14:24 14-09-2025

Advantages:

- Streamlines medical inventory processes.
- Reduces manual errors.
- Provides real-time alerts and reports.
- Improves decision-making.

Disadvantages:

- Requires Salesforce expertise for setup.
- Internet dependency.
- Licensing cost for enterprise-level usage.

CONCLUSION

The **Medical Inventory Management System** built on Salesforce effectively automates medical inventory operations. By integrating supplier management, product tracking, purchase order workflows, and automated alerts, the system improves accuracy, reduces manual effort, and supports better organizational efficiency.

APPENDIX

Trigger (Prevent Duplicate Products)

```
trigger PreventDuplicateProducts on Product__c (before insert) {  
    Set<String> existingProducts = new Set<String>();  
    for (Product__c prod : [SELECT Name FROM Product__c]) {  
        existingProducts.add(prod.Name);  
    }  
    for (Product__c newProd : Trigger.new) {  
        if (existingProducts.contains(newProd.Name)) {  
            newProd.addError('This product already exists in inventory.');//  
        }  
    }  
}
```

```
}
```

Scheduler (Monthly Inventory Report)

```
global class MonthlyInventoryReport implements Schedulable {  
  
    global void execute(SchedulableContext sc) {  
  
        sendInventoryReport();  
  
    }  
  
    public static void sendInventoryReport() {  
  
        List<Product__c> products = [SELECT Name, Quantity__c, Expiry_Date__c FROM Product__c];  
  
        String report = 'Monthly Inventory Report:\n\n';  
  
        for (Product__c p : products) {  
  
            report += 'Product: ' + p.Name + ', Quantity: ' + p.Quantity__c + ', Expiry: ' + p.Expiry_Date__c +  
'\n';  
  
        }  
  
        Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();  
  
        email.setToAddresses(new String[]{'admin@hospital.com'});  
  
        email.setSubject('Monthly Inventory Report');  
  
        email.setPlainTextBody(report);  
  
        Messaging.sendEmail(new Messaging.SingleEmailMessage[]{email});  
  
    }  
}
```

