Medical Inventory Management System

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Medical Inventory Management System

## Introduction

The Medical Inventory Management System is a specialized solution designed to streamline the storage, tracking, and distribution of medical supplies, equipment, and pharmaceuticals within healthcare facilities. In hospitals, clinics, and pharmacies, maintaining accurate and up-to-date inventory records is essential to ensure timely patient care, reduce operational costs, and prevent shortages or wastage of critical items.

This system enables healthcare organizations to efficiently manage supplier details, monitor stock levels, track batch numbers, and keep a record of expiry dates to ensure the safe use of medicines and equipment. It also helps automate purchase orders, manage billing, and generate real-time reports for decision-making.

# User Story

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.

# Project Flow

1. Milestone 1 : Creation of developer account
2. Milestone 2 : Object Creation
3. Milestone 3 : Tabs
4. Milestone 4 : The Lightning App
5. Milestone 5 : Fields
6. Milestone 6 : Updating of Page Layouts
7. Milestone 7 : Compact Layouts
8. Milestone 8 : Validation rules
9. Milestone 9 : Profiles
10. Milestone 10 : Roles
11. Milestone 11 : Users
12. Milestone 12 : Permission Sets
13. Milestone 13 : Flows
14. Milestone 14 : Triggers
15. Milestone 15 : Reports
16. Milestone 16 : Dashboards
17. Milestone 17 : Conclusion

# What You'll Learn

* Real Time Salesforce Project
* Object & their relationship in Salesforce
* Page Layout
* Validation Rules
* Compact Layouts
* Profiles
* Roles
* Users
* Permission Sets
* Triggers
* Flows
* Reports
* Dashboards

# Milestone 1 - Salesforce Account

Introduction:  
  
 Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don’t know where you should start on your learning journey? If you’ve answered yes to any of these questions, then you’re in the right place. This module is for you.  
  
 Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we’ll take you through these features and answer the question, “What is Salesforce, anyway?”.

## What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.  
  
 Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.  
  
Video Reference: https://youtu.be/r9EX3lGde5k

# Milestone 2 - Objects

In Salesforce, objects are database tables that allow you to store data specific to your organization.

# Milestone 3 - Tabs

In Salesforce, tabs are used to make the data stored in objects accessible to users through the user interface. Tabs are a fundamental part of the Salesforce interface, providing a way to navigate to different objects and records.

# Milestone 4 - The Lightning App

A Lightning App in Salesforce is a collection of items that work together to serve a particular function for the end-users. These items can include standard and custom objects, tabs, utilities, and other productivity tools. Lightning Apps are designed to provide a more intuitive and efficient user experience compared to traditional Salesforce apps.

# Milestone 5 - Fields

Example object fields with data types:

## 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

## 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)

## 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)

## Inventory Transaction

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

## Supplier

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

# Milestone 6 - Editing of Page Layouts

Page layouts in Salesforce are used to customize the organization, structure, and content of pages for viewing and editing records.

# Milestone 7 - Compact Layouts

Compact layouts display a record’s key fields at a glance, providing important information quickly without needing to open the record.

# Milestone 8 - Validation Rules

Validation rules in Salesforce ensure data integrity by preventing users from saving invalid data in records.

# Milestone 9 - Profiles

Profiles define what users can do within the organization, controlling permissions to objects, fields, tabs, and apps.

# Milestone 10 - Roles

Roles control record-level access and define the hierarchy of an organization, determining visibility of records.

# Milestone 12 - Permission Sets

Permission Sets extend user permissions beyond profiles, granting additional access to tools and functions.

# Milestone 13 - Flows

Flows are automation tools to collect data, perform actions, and guide users through processes.

# Milestone 14 - Triggers

Triggers are Apex code that run before or after DML events to enforce business logic and ensure data integrity.

# Milestone 15 - Reports

Reports provide ways to analyze and visualize Salesforce data for decision-making and performance tracking.

# Milestone 16 - Dashboards

Dashboards are visual representations of reports, offering real-time insights into organizational performance.

# Conclusion

The Medical Inventory Management System provides a reliable and structured solution for handling medicines, equipment, and healthcare supplies in an organized manner. By automating key processes such as supplier management, stock tracking, purchase orders, transactions, and expiry monitoring, the system reduces human error, saves time, and ensures accuracy in maintaining inventory records.