

PROJECT TITLE:

Medical Inventory Management System

College Name: VET INSTITUTE OF ARTS AND SCIENCE

College Code: 65651

TEAM ID: NM2025TMID25772

TEAM MEMBERS:

Team Leader: Lakisha Bothra

Email: lakishabothra23csa@vetias.ac.in

Team Member: Jeevan kumar

Email: jeevankumar23csa@vetias.ac.in

Team Member: Logeshwari

Email: logeshwarik23csa@vetias.ac.in

Team Member: Rohit Pranav Devaraj

Email: rohitpranavdevaraj23csa@vetias.ac.in

Team Member: Suman D

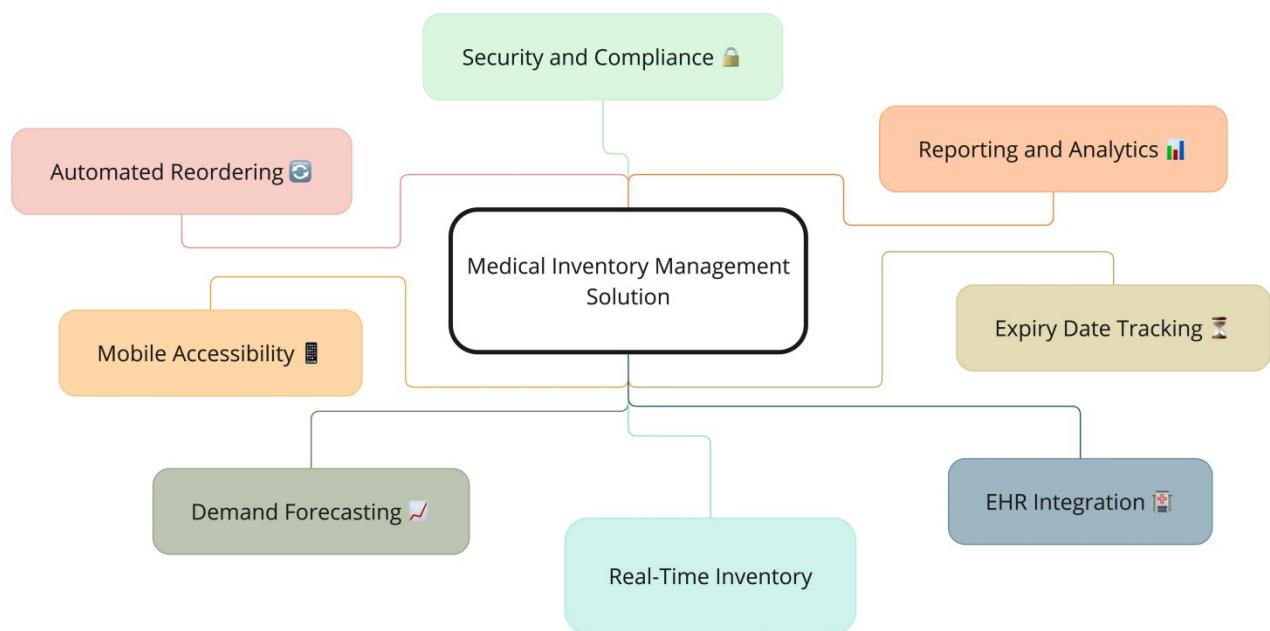
Email: sumand23csa@vetias.ac.in

1.INTRODUCTION

1.1 Project Overview :

The **Medical Inventory Management System** is a Salesforce-based digital application designed to manage and track medical supplies, medicines, and equipment efficiently. It ensures hospitals, pharmacies, and clinics maintain accurate stock levels, monitor expiry dates, and streamline the process of procurement and distribution.

The system allows administrators to add, update, and monitor stock, set reorder levels, generate real-time inventory reports, and receive automated alerts for low stock or expired items. This improves patient safety and helps healthcare organizations maintain compliance.



1.2 Purpose :

The main objective of this project is to:

- Ensure **accurate stock management** of medicines and equipment.
- Minimize **wastage due to expired items**.

- Automate **purchase requests** when stock reaches threshold levels.
- Provide **real-time transparency** for healthcare providers.
- Enhance patient safety by ensuring **availability of essential medicines**.

DEVELOPMENT PHASE:

Creating Developer Account:

By using this URL – <https://www.salesforce.com/form/developer-signup/?d=pd>

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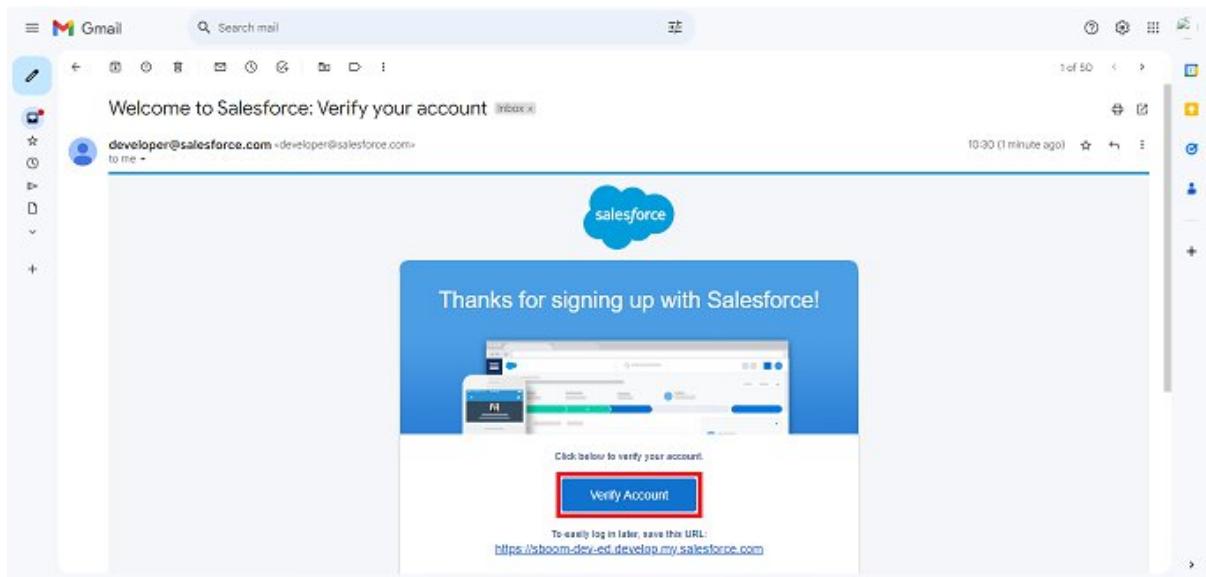
Job title Work email

Company Country/Region

Your org may be provisioned on or migrated to Hyperforce. Salesforce's public cloud infrastructure.

I agree to the [Main Service Agreement – Developer Services](#) and [Salesforce Program Agreement](#). I acknowledge, as described in the [Developer Documentation](#): (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

By registering I confirm that I have read and agree to the [Privacy Statement](#).



A screenshot of a Salesforce password change form titled "Change Your Password". The form asks for a new password, which must be at least 8 characters long, contain one letter, and one number. The "New Password" field contains "....." and is labeled "Good". The "Confirm New Password" field also contains "....." and is labeled "Match". Below these fields is a "Security Question" section with the question "In what city were you born?". The "Answer" field contains "asdfghjkl". A large red box highlights the "New Password", "Confirm New Password", and "Answer" fields. A blue "Change Password" button is at the bottom.

Enter a new password for lead@sb.oom.
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

* Confirm New Password
..... Match

Security Question
In what city were you born?

* Answer
asdfghjkl

Change Password

This screenshot shows the Salesforce Setup Home page. The left sidebar contains links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, and Users. The main content area features three cards: "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative Docs". Each card has a "Get Started" button.

This screenshot is similar to the first one, but with numbered annotations. A red box labeled '2' highlights the "Object Manager" tab in the top navigation bar. A red box labeled '3' highlights the "Create" button in the top right corner of the main content area.

This screenshot shows the "New Custom Object" page. The top navigation bar includes "Setup", "Home", and "Object Manager" (with a red box labeled '2'). The main content area is titled "Custom Object Definition Edit" and contains sections for "Custom Object Information" and "Object Name". The "Object Name" section includes fields for "Label" (containing "Product" with a red box labeled '4') and "Plural Label" (containing "Products" with a red box labeled '5'). Below these are fields for "Starts with vowel sound" (checkbox) and "Object Name" (containing "Product" with a red box labeled '6'). The "Object Name" field has a tooltip: "The Object Name is used when referencing the object via the API." and "Example: Account". The "Description" section contains a large text input field. At the bottom, there are "Save", "Save & New", and "Cancel" buttons, and a "Context-Sensitive Help Setting" section with two options: "Open the standard Salesforce.com Help & Training window" and "Open a window using a Visualforce page".

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	Product ID	Example: Account Name
Data Type: 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
- Allow in Chatter Groups
- Enable Licensing

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.

Setup **Home** **Object Manager**

Q. tab **1**

Feature Settings

- Analytics
- Tableau** **2**
- Tableau Embedding
- User Interface
- Loaded Console Tab Limit
- Rename Tabs and Labels
- Tabs** **3**

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

SETUP **Tabs**

Custom Tabs **Help for this Page**

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 **New** **What Is This?**

No Custom Object Tabs have been defined

Web Tabs **New** **What Is This?**

No Web Tabs have been defined

Visualforce Tabs **New** **What Is This?**

No Visualforce Tabs have been defined

Activate Windows

SETUP Tabs

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [Create a new custom object here](#).

Object: **Product** Tab Style: **Stethoscope**

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link: **--None--**

Enter a short description.

Description:

Next **Cancel**

Setup Home Object Manager

Q: App man

Apps **App Manager** 1

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

Lightning Experience App Manager

New Lightning App New Connected App 2

28 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name ↑	Developer Name ↓	Description	Last Modified ...	App Type	Vi...
------------	------------------	-------------	-------------------	----------	-------

New Lightning App

App Details

*App Name **Medical Inventory Management** 3

*Developer Name **Medical_Inventory_Management**

Description **Enter a description...**

App Branding

Image **3** 3

Primary Color Hex Value **#0070D2**

Org Theme Options Use the app's image and color instead of the org's custom theme

App Launcher Preview

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

- Products
- Purchase Orders
- Order Items
- Inventory Transactions
- Suppliers
- Reports

6

New Lightning App

User Profiles

Choose the user profiles that can access this app.

7

Available Profiles

Selected Profiles

8

Save & Finish

1

2

3

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			

Setup | Home | Object Manager

Product

Details 4
Fields & Relationships

Fields & Relationships
4 Items, Sorted by Field Label

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

New Deleted Fields Field Dependencies Set History Tracking

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

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

Step 2. Enter the details Step 2 of 4

Field Label Product Name 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

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

<input type="radio"/> Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
<input type="radio"/> Number	Allows users to enter any number. Leading zeros are removed.
<input type="radio"/> Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input type="radio"/> Text	Allows users to enter any combination of letters and numbers.
<input checked="" 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.

Next Cancel

Step 2. Enter the details Step 2 of 4

Field Label  7

Field Name  8

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 

Default Value 
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__c}

Previous Next Cancel

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 7

Number of digits to the left of the decimal point
Field Name 
Description
Help Text

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

Do not allow duplicate values
 Set this field as the unique record identifier from an external system

Previous Next Cancel

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 5 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 5

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

Next Cancel

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 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.

Lookup Relationship 4 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.

Purchase Order
New Relationship

Help for this Page ?

Step 2

Step 2. Choose the related object

Previous Next Cancel

Select the other object to which this object is related.

Related To 5

Previous Next Cancel

Field Label 7

Field Name 8

Description

Help Text

Child Relationship Name 9

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

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

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

Default Value
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

Purchase Order
New Custom Field Help for this Page

Step 2. Enter the details Step 2 of 5

Field Label 5

Field Name 6

Description

Help Text

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

Purchase Order New Custom Field

Help for this Page

Step 3. Define the summary calculation

Step 3 of 5

Previous Next Cancel

Select Object to Summarize

Master Object: Purchase Order
Summarized Object: Order Items 6

1 Required Information

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

Step 2. Choose output type

Step 2 of 5

Previous Next Cancel

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

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 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.

Order Item New Custom Field

Help for this Page

Step 3. Enter formula

Step 3 of 5

Previous Next Cancel

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

Unit Price (Currency) = 7

Functions

-- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Quick Tips 8

- Getting Started
- Operators & Functions

Simple Formula Advanced Formula

Insert Field Insert Operator

```
Amount (Currency) =  
Quantity_Received__c * Unit_Price__c
```

Functions -- All Function Categories -- ABS ACOS ADDMONTHS AND ASCII ASIN Insert Selected Function

7

Step 2. Enter the details Step 2 of 4

Field Label Transaction Type 5

Values Use global picklist value set Enter values, with each value separated by a new line 6

Receipt
Issue
Adjustment

Display values alphabetically, not in the order entered
 Use first value as default value
 Restrict picklist to the values defined in the value set

Field Name Transaction_Type 7

Description OneDrive - Personal Online

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

Step 2. Enter the details Step 2 of 4

Field Label	Phone Number	5
Field Name	Phone_Number	5
Description		
Help Text		
Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record 6	
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity 6	
Default Value	Show Formula Editor	
<small>Use formula syntax. Enclose text and picklist value API names in double quotes - ("the_label"). Include numbers without quotes - (25), show percentages as decimal - (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</small>		

Previous Next Cancel

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

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

Fields

Buttons	Expected Delivery...	Owner
Quick Actions	Last Modified By	Purchase Order ID
Mobile & Lightning Actions	Actual Delivery Date	Order Count
Expanded Lookups	Created By	Supplier ID
Related Lists		Order Date
Report Charts		Total Order Cost

Information (Header visible on edit only)

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

System Information (Header visible on edit only)

Created By Sample Text Last Modified By Sample Text

SETUP > OBJECT MANAGER

Order Item

Page Layouts

Information (Header visible on edit only)

Order Item ID	Sample Text
Amount	₹123.45

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
------------	-------------

Custom Links (Header visible on edit only)

Last Modified By	Sample.Text
------------------	-------------

SETUP > OBJECT MANAGER

Inventory Transaction

Page Layouts

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

SETUP > OBJECT MANAGER

Supplier

Page Layouts

Information (Header visible on edit only)

Supplier ID	Sample.Text
Supplier Name	Sample.Text
Contact Person	Sample.Text

Phone Number: 1-415-555-1212
Email: sarah.sample@company.com
Address: Sample.Text
Owner: Sample.Text

System Information (Header visible on edit only)

Created By	Sample.Text
------------	-------------

Last Modified By: Sample.Text

Custom Links (Header visible on edit only)

Owner	Sample.Text
-------	-------------

SETUP > OBJECT MANAGER

Product

Compact Layouts

1 Items, Sorted by Label

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

Quick Find New Compact Layout Assignment

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

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

Add Remove Top Up Up Down Down Bottom

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

6

Product 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: 9

Save Cancel 10

Compact Layout Edit

Enter Compact Layout Information

Label: Purchase Order Compact L **4**
 Name: Purchase_Order_Compact [i](#)

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

Add **5**, 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

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 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

Rule Name: Expected_Delivery_Date_Validation **3**
 Active: **4**
 Description:

Error Condition Formula

Example: 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

Functions

Insert Field **5** Insert Operator **5**

(Expected_Delivery_Date__c - Order_Date__c) > 7

ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN

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

8

Save

Save & New

Cancel

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Setup, Home, Object Manager
- Search Bar:** Q Profiles
- Left Navigation:** Users, Profiles (highlighted with a red box)
- Page Title:** Profiles
- Page Subtitle:** All Profiles
- Actions:** Edit | Delete | Create New View
- Table Headers:** Action, Profile Name, User License, Custom
- Table Data:** A list of profiles including:
 - Salesforce API Only System Integrations (User License: Salesforce Integration)
 - Silver Partner User (User License: Silver Partner)
 - Solution Manager (User License: Salesforce)
 - Standard Platform User (User License: Salesforce Platform)
 - Standard User (User License: Salesforce) - This row is highlighted with a red box.
 - System Administrator (User License: Salesforce)
- Page Footer:** Help for this Page, Other: All, A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

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	<input type="text" value="Inventory Manager"/>

Save **Cancel**

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"/>						

Password Policies

User passwords expire in	<input type="text" value="Never expires"/>
Enforce password history	<input type="text" value="3 passwords remembered"/>
Minimum password length	<input type="text" value="8"/>
Password complexity requirement	<input type="text" value="Must include alpha and numeric characters"/>
Password question requirement	<input type="text" value="Cannot contain password"/>
Maximum invalid login attempts	<input type="text" value="10"/>
Lockout effective period	<input type="text" value="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**

SETUP Profiles

Set the permissions and page layouts for this profile.

Profile Edit

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

Custom Object Permissions

Object	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"/>

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"/>

Buttons

Save Save & New Cancel

Custom Object Permissions

Object	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"/>

Password Policies

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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"/>

Buttons

Save Save & New Cancel

Setup Home Object Manager

Q: roles

Users Roles

Feature Settings

- Sales
 - Contact Roles on Contracts
 - Contact Roles on Opportunities
- Service
- Case Teams
 - Case Team Roles
 - Contact Roles on Cases

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

SETUP Roles

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy View other sample Role Hierarchies **Territory-based Sample**

* View & edit data, roll up hierarchies, & generate reports
* Can't access data of other Executive Staff

* View & edit data, roll up hierarchies, & generate reports for Western Sales Reps below
* Can't access data of users above or at same level

* View & edit data, roll up hierarchies, & generate reports for Eastern Sales Reps below
* Can't access data of users above or at same level

* View & edit data, roll up hierarchies, & generate reports for International Sales Reps below
* Can't access data of users above or at same level

Set Up Roles Don't show this page again

SETUP Roles

Role Edit

New Role

Role Edit

Label	Purchasing Manager
Role Name	Purchasing_Manager i
This role reports to	SVP, Sales & Marketing 🔍

Role Name as displayed on reports

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

Setup Home Object Manager

Q roles

Users Roles

Feature Settings

- Sales
 - Contact Roles on Contracts
 - Contact Roles on Opportunities
- Service
 - Case Teams
 - Case Team Roles
 - Contact Roles on Cases

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

SETUP Roles

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy

View other sample Role Hierarchies [Territory-based Sample](#)

The diagram illustrates a role hierarchy:

- CEO_President** (CFO, VP_Sales)
- Executive Staff**
 - Western Sales Director** (Director of W. Sales)
 - Western Sales Rep** (CA Sales Rep, OR Sales Rep)
 - Eastern Sales Rep** (NY Sales Rep, WA Sales Rep)
 - Eastern Sales Director** (Director of E. Sales)
 - International Sales Rep** (Asian Sales Rep, European Sales Rep)
 - International Sales Director** (Director of Int'l Sales)
 - International Sales Rep** (Asian Sales Rep, European Sales Rep)

* View & edit data, roll up hierarchies, & generate reports for users above or at same level.
* Can't access data of other Executive Staff.

* View & edit data, roll up hierarchies, & generate reports for users above or at same level.
* Can't access data of users above or at same level.

* View & edit data, roll up hierarchies, & generate reports for users above or at same level.
* Can't access data of users above or at same level.

[Set Up Roles](#)

Don't show this page again

SETUP Roles

Role Edit

New Role

Role Edit

Label	Inventory Manager
Role Name	Inventory_Manager
This role reports to	SVP, Sales & Marketing

Role Name as displayed on reports

[Save](#) [Save & New](#) [Cancel](#)

Setup Home Object Manager

1 user

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users** 2
- Feature Settings
- Data.com
- Prospector Users
- User Interface

SETUP Users

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	u1	utkarsht2@vanshiv.com	Operator_1	<input checked="" type="checkbox"/>	operator
<input type="checkbox"/> Edit	2_User	u2	utkarsht3@vanshiv.com	Operator_2	<input checked="" type="checkbox"/>	operator
<input type="checkbox"/> Edit	Chatter_Expert	Chatter	chatty.00d2w00000rs8akeal.muir@fbf1@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Technologies_Vanshiv	VTech	vehicledemo@vanshiv.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Teddy.John	j_ted	utkarsht1@vanshiv.com	Vehicle Manager	<input checked="" type="checkbox"/>	Vehicle Manager

3 New User Reset Password(s) Add Multiple Users

SETUP Users

New User

User Edit

General Information

First Name	John	Role	Purchasing Manager
Last Name	PurchaseM	User License	Salesforce
Alias	jpurc	Profile	Purchase Manager
Email	annapurnabethi@gmail.com	Active	<input checked="" type="checkbox"/>
Username	john@purchasem.com	Marketing User	<input type="checkbox"/>
Nickname	John	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	--None--
		Data.com Monthly Addition Limit	Default Limit (300)
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>

Required Information

Setup Home Object Manager

1. Search bar: user

2. Left sidebar: Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users** (highlighted)
- Feature Settings
- Data.com
- Prospector Users
- User Interface

3. Main content: All Users

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	u1	utkarsht2@vanshiv.com	Operator_1	<input checked="" type="checkbox"/>	operator
<input type="checkbox"/> Edit	2. User	u2	utkarsht3@vanshiv.com	Operator_2	<input checked="" type="checkbox"/>	operator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.002w0000rs8akeal.muir@chtf1@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Technologies Vanshiv	VTech	vehicledemo@vanshiv.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Teddy. John	jted	utkarsht1@vanshiv.com	Vehicle Manager	<input checked="" type="checkbox"/>	Vehicle Manager

Setup Home Object Manager

1. Search bar: Permission

2. Left sidebar: Permission Sets

- Custom Code
- Custom Permissions

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

3. Main content: Permission Sets

Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets | Edit | Delete | Create New View

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and categories, make ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts and or ...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	C360 High Scale Flow Integration User	Allows integration user to access features specific to C360 High Scale Flow.	Cloud Integration User
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Connect a ...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Admin (Partner Telephony)	Manage Service Cloud Voice contact centers that use your preferred tele ...	Service Cloud Voice User (Partner Telephony)
<input type="checkbox"/> Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that use A ...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent (Partner Telephony)	Access agent features in Service Cloud Voice contact centers that use yo ...	Service Cloud Voice User (Partner Telephony)
<input type="checkbox"/> Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that us ...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Supervisor (Partner Telephony)	Access supervisor features in Service Cloud Voice contact centers that us ...	Service Cloud Voice User (Partner Telephony)
<input type="checkbox"/> Clone	Data Cloud Home Org Integration User	Allows integration user to access entities specific to Remote Data Cloud.	Cloud Integration User
<input type="checkbox"/> Clone	DeliveryEstimationServicePermis		Salesforce
<input type="checkbox"/> Del Clone	Experience Profile Manager		

Setup Home Object Manager

1. Search bar: Purchase Manager Create Access

2. Left sidebar: Create

3. Main content: Enter permission set information

Enter permission set information

Label: Purchase Manager Create Access

API Name: Purchase_Manager

Description:

Session Activation Required:

Save | Cancel

SETUP

Permission Sets

Permission Set
Purchase Manager Create Access

Find Settings... | Clone | Delete | Edit Properties | Manage Assignments | View Summary

Permission Set Overview > Object Settings Order Items

Order Items

Save | Cancel

Tab Settings

Available	Visible
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

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

Purchase Manager Create Access

Select Users to Assign

Active Users

1 item selected

Full Name	Alias	Username	Role	Active	Profile	
Annapurna Gurram	AGurr	medicalinventory@sb.com	<input checked="" type="checkbox"/>	System Administrator		
Chatter Expert	Chatter	chatty.00dd10000058bqluaayrgohck7wjvo@chatter.salesforce.com	<input checked="" type="checkbox"/>	Chatter Free User		
Integration User	integ	integration@00dd10000058bqlua.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@00dd10000058bqlua.com	<input checked="" type="checkbox"/>	Analytics Cloud Security User		

Search this list...    

Next

... > 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...

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

[Cancel](#) [Back](#) [Assign](#)

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.

[Back](#) [Next](#)

New Flow

Core All + Templates

 Screen Flow Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and...	 Record-Triggered Flow Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background. <small>2</small>
 Schedule-Triggered Flow Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.	 Platform Event—Triggered Flow Launches when a platform event message is received. This autolaunched flow runs in the background.
 Autolaunched Flow (No Trigger) Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.	 Record-Triggered Orchestration Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.

[Create](#)



Configure Start

X

Select Object

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

* Object

Purchase Order

3

Configure Trigger

* Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated
- A record is deleted

4

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

Get Records

* Label **8** * API Name **Get_Purchase_Record**

Description

Get Records of This Object

* Object **9** Purchase Order

Filter Purchase Order Records **10**

Condition Requirements

All Conditions Are Met (AND) ▾

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

+ Add Condition

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

+ Add Field

Assignment

*Label	* API Name <small>i</small>
Assignment	Assignment_1
Description	
<pre>if \$Record > Order Date == ActualDeliveryDate then ActualDeliveryDate = Add(ActualDeliveryDate, 3)</pre>	

Set Variable Values

Each variable is modified by the operator and value combination.

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

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

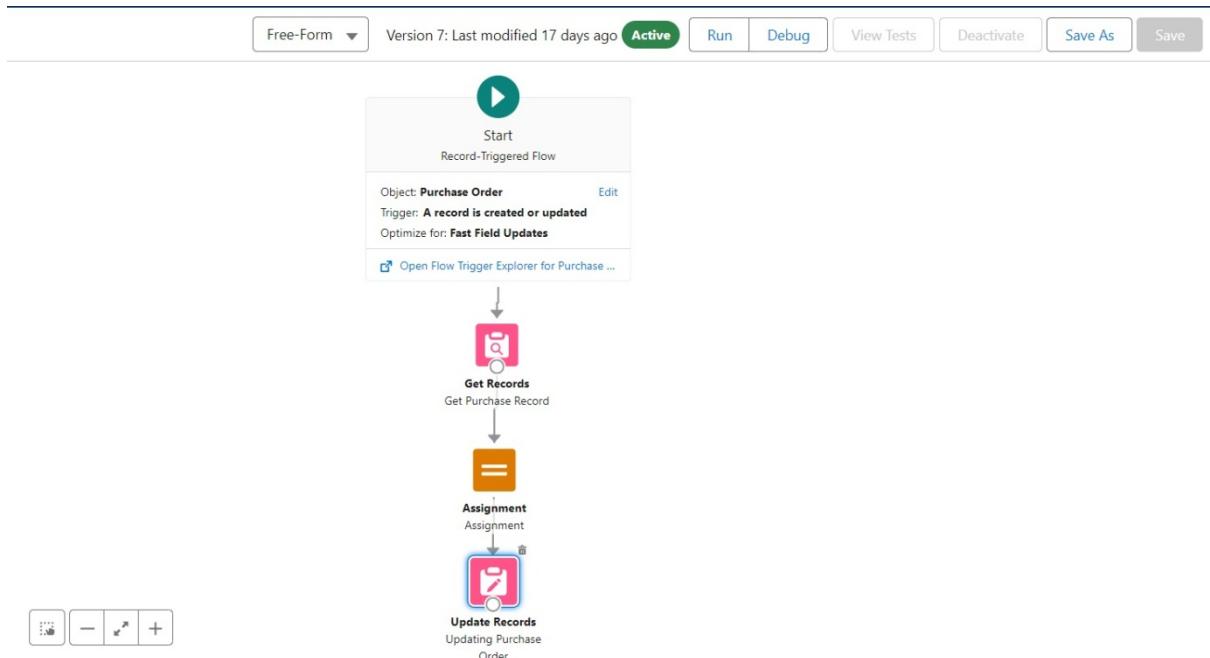
i Because this flow runs *before* a record is saved, you can only update the record that triggered the flow to run. To update other records, configure the trigger to run the flow *after* the record is saved.

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	



New Apex Trigger

Name: CalculateTotalAmountTrigger

sObject: Order_Item__c

Submit

Create Report

Category
Recently Used
All
Accounts & Contacts
Opportunities
Customer Support Reports
Leads
Campaigns
Activities
Contracts and Orders

Select a Report Type

Showing results for Purchase

Report Type Name	Category
Purchase Orders	Standard
Purchase Orders with Supplier ID	Standard
Purchase Orders with Order Items	Standard
Purchase Orders with Order Items and Product ID	Standard
Inventory Transactions with Purchase Order ID	Standard

Details

Purchase Orders Standard Report Type

Start Report

Fields (17)

Created By You

Purchase Orders based on Suppliers

Created By Others

☰ Outline ▼ Filters

Filters

Add filter...



Show Me
All purchase orders

Actual Delivery Date
All Time

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

REPORT ▾ Purchase Orders based on Suppliers Purchase Orders

Fields > ☰ Outline ▼ Filters 1

Groups Supplier ID Purchase Order: Purchase Order ID

Columns # Order Count # Total Order Cost

Supplier ID ↑ Purchase Order: Purchase Order ID ↑ Order Count ↓ Total Order Cost ↓

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

Previews a limited number of records. Run the report to see everything.

Save & Run Update Preview Automatically

Row Counts Detail Rows Subtotals Grand Total

Conditional Formatting

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

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

Enable Field Editing Add Chart Edit

Row Counts Detail Rows Subtotals Grand Total

Outline
 Filters

Filters

Add filter...


Show Me
All purchase orders

Actual Delivery Date
All Time

REPORT ▾ Complete Purchase Details Report ▾ Purchase Orders with Order Items and Product ID

Fields

Groups

- Supplier ID
- Actual Delivery Date
- Purchase Order: Purchase Order ID

Supplier ID

Actual Delivery Date

Purchase Order: Purchase Order ID

Columns

- Add column...
- Product ID: Product ID
- # Order Count
- Product ID: Product Name
- # Quantity Received
- # Amount

Row Counts Detail Rows Subtotals Grand Total

REPORT ▾ Previewing a limited number of records. Run the report to see everything.

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
			Subtotal				
	22/06/2024 (3)	Purchase-0001 (3)	Gen-0001	3	Syringes	5	\$25.00
			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
			Subtotal				
	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
			Subtotal				
	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	300	\$1,000.00
			Subtotal				

Update Preview Automatically

REPORT ▾ Conditional Formatting

The screenshot shows a software application window with a toolbar at the top containing various icons for actions like 'Stock from Vendors', 'Vendor Bills', 'Reports', and 'Dashboards'. Below the toolbar, a red box highlights a modal window titled '+ Widget'. Inside the modal, there are three options: 'Chart or Table' (with a checkmark icon), 'Text' (with a text icon), and 'Image' (with a camera icon). A red number '5' is positioned in the top-left corner of the main content area.

Select Report

Reports

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

Folders

- Created by Me
- Shared with Me

All Folders

Select Report

Reports and Folders ▾

All Folders > Private Reports

Complete Purchase Details Report
Annapurna Gurram · 06-Jul-2024, 11:58 am · Private Reports

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

Cancel
Select

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

Display Units

Preview

Purchase Orders based on Suppliers

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

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

Cancel
Add

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

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

[Cancel](#) [Add](#)

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

Dashboard Medical Inventory Dashboard As of 06-Jul-2024, 12:15 pm Viewing as Annapurna Guram Refresh Edit Subscribe

Purchase Orders based on Suppliers

Sum of Total Order Cost

Supplier ID

Supplier-001

Supplier-002

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

SETUP Profiles

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"/>	<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"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="radio"/>	Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>
Marketing CRM Classic (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="radio"/>	Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Medical Inventory Management (Medical_Inventory_Management)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard__Work)	<input checked="" type="checkbox"/>	<input type="radio"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>			

Apex Handler

Developer Console - Google Chrome
orgfarm-8c77363155-dev-ed.develop.my.salesforce.com/_ui/common/apex/Debug ApexCSIPage

```
File • Edit • Debug • Test • Workspace • Help • < > Go To
CalculateTotalAmountHandler.apc 4
Code Coverage: None API Version: 64
1 * public class CalculateTotalAmountHandler {
2
3     public static void calculateTotal(
4         List<Order_Item__c> newItems,
5         List<Order_Item__c> oldItems,
6         Boolean isInsert,
7         Boolean isUpdate,
8         Boolean isDelete,
9         Boolean isUndelete
10    ) {
11        Set<Id> parentIds = new Set<Id>();
12
13        // For insert, update, and undelete
14        if (isInsert || isUpdate || isUndelete) {
15            for (Order_Item__c ordItem : newItems) {
16                if (ordItem.Purchase_Order__c != null) {
17                    parentIds.add(ordItem.Purchase_Order__c);
18                }
19            }
20        }
21
22        // For update and delete
23        if (isUpdate || isDelete) {
24            for (Order_Item__c ordItem : oldItems) {
25                if (ordItem.Purchase_Order__c != null) {
26                    parentIds.add(ordItem.Purchase_Order__c);
27                }
28            }
29        }
30    }
31
32    public static void calculateTotal(
33        List<Order_Item__c> newItems,
34        List<Order_Item__c> oldItems,
35        Boolean isInsert,
36        Boolean isUpdate,
37        Boolean isDelete,
38        Boolean isUndelete
39    ) {
40        Set<Id> parentIds = new Set<Id>();
41
42        // For insert, update, and undelete
43        if (isInsert || isUpdate || isUndelete) {
44            for (Order_Item__c ordItem : newItems) {
45                if (ordItem.Purchase_Order__c != null) {
46                    parentIds.add(ordItem.Purchase_Order__c);
47                }
48            }
49        }
50
51        // For update and delete
52        if (isUpdate || isDelete) {
53            for (Order_Item__c ordItem : oldItems) {
54                if (ordItem.Purchase_Order__c != null) {
55                    parentIds.add(ordItem.Purchase_Order__c);
56                }
57            }
58        }
59    }
60
61    public static void calculateTotal(
62        List<Order_Item__c> newItems,
63        List<Order_Item__c> oldItems,
64        Boolean isInsert,
65        Boolean isUpdate,
66        Boolean isDelete,
67        Boolean isUndelete
68    ) {
69        Set<Id> parentIds = new Set<Id>();
70
71        // For insert, update, and undelete
72        if (isInsert || isUpdate || isUndelete) {
73            for (Order_Item__c ordItem : newItems) {
74                if (ordItem.Purchase_Order__c != null) {
75                    parentIds.add(ordItem.Purchase_Order__c);
76                }
77            }
78        }
79
80        // For update and delete
81        if (isUpdate || isDelete) {
82            for (Order_Item__c ordItem : oldItems) {
83                if (ordItem.Purchase_Order__c != null) {
84                    parentIds.add(ordItem.Purchase_Order__c);
85                }
86            }
87        }
88    }
89
90    public static void calculateTotal(
91        List<Order_Item__c> newItems,
92        List<Order_Item__c> oldItems,
93        Boolean isInsert,
94        Boolean isUpdate,
95        Boolean isDelete,
96        Boolean isUndelete
97    ) {
98        Set<Id> parentIds = new Set<Id>();
99
100       // For insert, update, and undelete
101       if (isInsert || isUpdate || isUndelete) {
102           for (Order_Item__c ordItem : newItems) {
103               if (ordItem.Purchase_Order__c != null) {
104                   parentIds.add(ordItem.Purchase_Order__c);
105               }
106           }
107       }
108
109       // For update and delete
110       if (isUpdate || isDelete) {
111           for (Order_Item__c ordItem : oldItems) {
112               if (ordItem.Purchase_Order__c != null) {
113                   parentIds.add(ordItem.Purchase_Order__c);
114               }
115           }
116       }
117   }
118 }
```

Logs, Tests, and Problems

Developer Console - Google Chrome
orgfarm-8c77363155-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

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CalculateTotalAmountHandler.apex

Code Coverage: None API Version: 64 Go To

```
22 // For update and delete
23 if (isUpdate || isDelete) {
24     for (Order_Item__c ordItem : oldItems) {
25         if (orditem.Purchase_Order__c != null) {
26             parentIds.add(ordItem.Purchase_Order__c);
27         }
28     }
29 }
30
31 if (!parentIds.isEmpty()) {
32     Map<Id, Decimal> purchaseToUpdateMap = new Map<Id, Decimal>();
33
34     // Aggregate query to calculate sum of Amount__c
35     List<AggregateResult> aggrList = [
36         SELECT Purchase_Order__c, SUM(Amount__c) totalAmount
37         FROM Order_Item__c
38         WHERE Purchase_Order__c IN :parentIds
39         GROUP BY Purchase_Order__c
40     ];
41
42     for (AggregateResult aggr : aggrList) {
43         Id purchaseOrderId = (Id)aggr.get('Purchase_Order__c');
44         Decimal totalAmount = (Decimal)aggr.get('totalAmount');
45         purchaseToUpdateMap.put(purchaseOrderId, totalAmount);
46     }
47
48     // Set total = 0 if no order items remain
49     for (Id parentId : parentIds) {
```

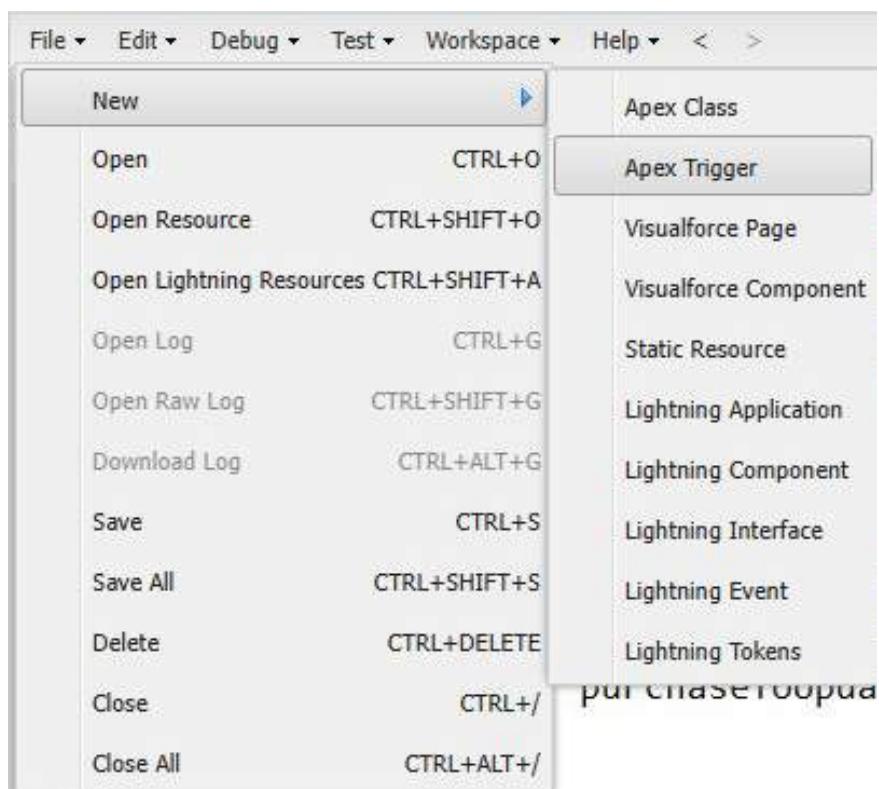
Developer Console - Google Chrome
orgfarm-8c77363155-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

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CalculateTotalAmountHandler.apex

Code Coverage: None API Version: 64 Go To

```
42     for (AggregateResult aggr : aggrList) {
43         Id purchaseOrderId = (Id)aggr.get('Purchase_Order__c');
44         Decimal totalAmount = (Decimal)aggr.get('totalAmount');
45         purchaseToUpdateMap.put(purchaseOrderId, totalAmount);
46     }
47
48     // Set total = 0 if no order items remain
49     for (Id parentId : parentIds) {
50         if (!purchaseToUpdateMap.containsKey(parentId)) {
51             purchaseToUpdateMap.put(parentId, 0);
52         }
53     }
54
55     // Prepare list of Purchase_Order__c records for update
56     List<Purchase_Order__c> purchaseToUpdate = new List<Purchase_Order__c>();
57     for (Id purchaseOrderId : purchaseToUpdateMap.keySet()) {
58         purchaseToUpdate.add(new Purchase_Order__c(
59             Id = purchaseOrderId,
60             Total_Order_cost__c = purchaseToUpdateMap.get(purchaseOrderId)
61         ));
62     }
63
64     if (!purchaseToUpdate.isEmpty()) {
65         update purchaseToUpdate;
66     }
67 }
68 }
```



New Apex Trigger

Name:

sObject: ▾

Submit

A modal dialog box titled "New Apex Trigger". It contains two input fields: "Name:" and "sObject:". The "sObject" field has a dropdown arrow icon. At the bottom right of the dialog is a "Submit" button.

Conclusion :

The **Medical Inventory Management System** improves efficiency in managing medical supplies by automating stock monitoring, expiry tracking, and supplier coordination. It ensures real-time availability of medicines, reduces wastage, and supports better decision-making for healthcare providers. The system enhances **efficiency, transparency, and patient safety** in medical operations.

Appendix:

- **Source Code:** Provided in Apex Classes and Triggers
- **Objects Used:** Inventory, Supplier, Purchase Order
- **Automation Implemented:** Expiry check, Low-stock alerts, Reorder triggers.

Apex handler :

```
public class CalculateTotalAmountHandler {  
    public static void calculateTotal(  
        List<Order_Item__c> newItems,  
        List<Order_Item__c> oldItems,  
        Boolean isInsert,  
        Boolean isUpdate,  
        Boolean isDelete,  
        Boolean isUndelete  
    ) {  
        Set<Id> parentIds = new Set<Id>();
```

```
// For insert, update, and undelete

if (isInsert || isUpdate || isUndelete) {

    for (Order_Item__c ordItem : newItems) {

        if (ordItem.Purchase_Order__c != null) {

            parentIds.add(ordItem.Purchase_Order__c);

        }

    }

}

// For update and delete

if (isUpdate || isDelete) {

    for (Order_Item__c ordItem : oldItems) {

        if (ordItem.Purchase_Order__c != null) {

            parentIds.add(ordItem.Purchase_Order__c);

        }

    }

}

if (!parentIds.isEmpty()) {

    Map<Id, Decimal> purchaseToUpdateMap = new Map<Id,
Decimal>();
```

```
// Aggregate query to calculate sum of Amount__c

List<AggregateResult> aggrList = [
    SELECT Purchase_Order__c, SUM(Amount__c) totalAmount
    FROM Order_Item__c
    WHERE Purchase_Order__c IN :parentIds
    GROUP BY Purchase_Order__c
];

for (AggregateResult aggr : aggrList) {
    Id purchaseOrderId = (Id)aggr.get('Purchase_Order__c');

    Decimal totalAmount = (Decimal)aggr.get('totalAmount');

    purchaseToUpdateMap.put(purchaseOrderId,
    totalAmount);
}

// Set total = 0 if no order items remain

for (Id parentId : parentIds) {
    if (!purchaseToUpdateMap.containsKey(parentId)) {
        purchaseToUpdateMap.put(parentId, 0);
    }
}

// Prepare list of Purchase_Order__c records for update

List<Purchase_Order__c> purchaseToUpdate = new
List<Purchase_Order__c>();
```

```
for (Id purchaseOrderId : purchaseToUpdateMap.keySet()) {  
    purchaseToUpdate.add(new Purchase_Order__c(  
        Id = purchaseOrderId,  
        Total_Order_cost__c =  
        purchaseToUpdateMap.get(purchaseOrderId)  
    ));  
}  
  
if (!purchaseToUpdate.isEmpty()) {  
    update purchaseToUpdate;  
}  
}  
}
```