

Guide to Inventory Management App

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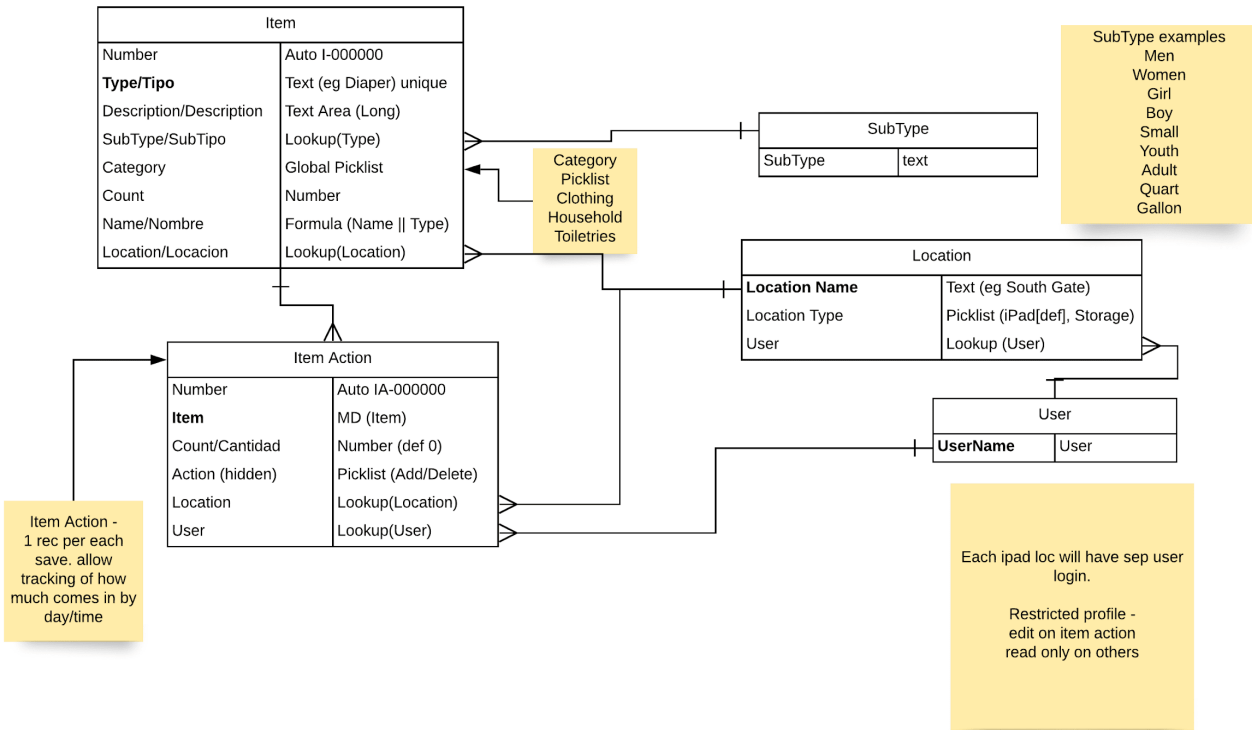
Overview

The Inventory Management App provides an easy and effective way to perform inventory management activities like tracking incoming donations, handing out donated items and managing locations.

App Architecture and Elements

The app consists of certain custom objects that enable inventory management functionality. Let's have a look at the relationship diagram and understand what each object does.

Object Relationship Diagram



Location Object

The Location object represents a location in a warehouse or facility where donation items are stored, managed, brought in, and checked out. A certain location can either have one type of donation item or many. The location object has a lookup to a user which helps you manage inventory access to users depending on what location they are assigned to work at. Location records can be accessed under a tab called "[Locations](#)"

Item Object

The Item object represents donation items. It holds the information about what the item is, the total inventory count, category of the item (clothing, toiletries, etc.), location at which it is stored, and also the subtype if there is one. Item records can be accessed under the "[Items](#)" tab.

SubType Object

An Item may have a subtype. For example, socks would be an item that will have the subtypes of small, youth and adult. It is designed this way so that we can manage the inventory of each subtype effectively. All the subtype items are accessible under the "SubTypes" tab.

ItemAction Object

ItemAction is an optional object defined as a [custom metadata type](#) that can be enabled at a later point to store the information of every addition and removal of inventory for the items. To enable it, go to the Setup > Custom Code > Custom Metadata Types > Click "Manage Records" next to "*Inventory Manager*" > Click Edit next to "Log Item Actions" > Check the "isEnabled" checkbox > Save. Similarly, uncheck the "isEnabled" checkbox to disable the object. The ItemAction record logs are accessible under the "Item Actions" tab.

Inventory Manager Lightning Page

This is the most important UI [Lightning page](#) where users will be managing inventory. It is built using a custom Lightning Web Component. The lightning page can be accessed in the org under Setup > Administration > User Interface > Lightning App Builder > *Inventory Manager*

Item List Lightning Web Component

Item List is a custom lightning web component which is exposed on the inventory manager lightning page. [Lightning Web Component \(LWC\)](#) is the latest and greatest technology we have right now in Salesforce to provide a fast and responsive application experience which is easy to build and manage. This component is reusable and can be used on any other lightning page if you desire.

Required Setup Steps

Enable MyDomain

A [My Domain](#) is required to ensure lightning components can work in an org. If the My Domain is not enabled, ensure it is enabled and deployed to all users. To enable My Domain, search for “my domain” in setup and provide a unique name for your my domain.

Permission Set Assignment

In order for the user to access the Inventory Management App, the user needs access to the relevant elements like pages, objects, etc. This is done by assigning the user a [permission set](#). Permission sets are a great way to control user access. To set it up, go to the Setup menu in your org and search for “permission sets”.

Setup > Users > Permission Sets > *Inventory Management (full)*. Click on the “Inventory Management (full)” permission set label.

The screenshot shows the Salesforce 'Permission Sets' page. At the top, there is a header 'Permission Sets' and a sub-header 'All Permission Sets' with options for 'Edit', 'Delete', and 'Create New View'. Below this is a table of permission sets. The table has two columns: 'Action' and 'Permission Set Label'. The 'Inventory Management (full)' row is highlighted with a red box. Other rows include 'Batch Gift Entry', 'CRM User', 'Salesforce Console User', 'Standard Einstein Activity Capture', 'View Donations', 'View and Edit Donations', and 'View and Edit Donations & Payments'.

Action	Permission Set Label
Del Clone	Batch Gift Entry
Clone	CRM User
Del Clone	Inventory Management (full)
Clone	Salesforce Console User
Clone	Standard Einstein Activity Capture
Del Clone	View Donations
Del Clone	View and Edit Donations
Del Clone	View and Edit Donations & Payments

Now, click the “Manage Assignments” button.


The screenshot shows the 'Permission Sets' page in Salesforce. At the top, there is a 'SETUP' link and a user icon. Below that, the page title is 'Permission Sets'. The main heading is 'Inventory Management (full)'. There is a search bar labeled 'Find Settings...' and three buttons: 'Clone', 'Edit Properties', and 'Manage Assignments'. The 'Manage Assignments' button is highlighted with a red box. Below the buttons, there is a 'Permission Set Overview' section with a table showing details like 'License', 'Salesforce', 'Session Activation Required', and 'Last Modified By'.

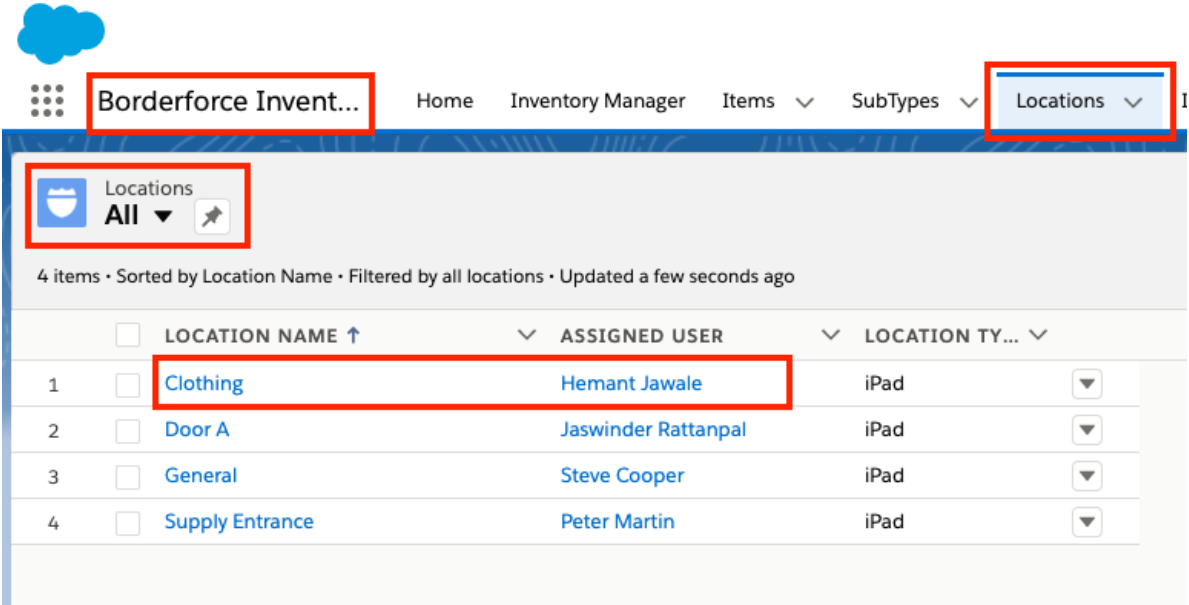
After this, click on the “Add Assignments” button. You will see a list of users. Select the users who you want to assign this permission set and click on the “Assign” Button. You can either select a single user or multiple users who need access. Click on “Assign” button again. Click “Done”.

The screenshot shows the 'Assign Users' page in Salesforce. The page title is 'All Users'. There is a 'View:' dropdown menu set to 'All Users' and a link to 'Create New View'. Below the view controls, there is a table of users with columns for 'Action', 'Full Name', 'Alias', and 'Username'. The 'Assign' button is highlighted with a red box. At the bottom right, there are 'Assign' and 'Cancel' buttons.

Action	Full Name ↑	Alias	Username
<input type="checkbox"/> Edit	Albert, Andrew	aalbe	<input type="text"/>
<input type="checkbox"/> Edit	Chatter Expert	Chatter	<input type="text"/>
<input checked="" type="checkbox"/> Edit	Cooper, Steve	scoop	<input type="text"/>
<input type="checkbox"/> Edit	Gupta, Sangita	sgupt	<input type="text"/>
<input type="checkbox"/> Edit	Jawale, Hemant	hjawa	<input type="text"/>
<input type="checkbox"/> Edit	Leddy, Tom	tledd	<input type="text"/>
<input type="checkbox"/> Edit	Martin, Joey	jmart	<input type="text"/>
<input type="checkbox"/> Edit	Martin, Peter	pmart	<input type="text"/>
<input type="checkbox"/> Edit	Nunez, Michelle	mnune	<input type="text"/>
<input type="checkbox"/> Edit	Rattanpal, Jaswinder	jratt	<input type="text"/>
<input type="checkbox"/> Edit	Weid, Chris	CWeid	<input type="text"/>

Enable User access to a Location

Ensure you are in the “Border Inventory Manager” App. Go to the App Launcher  and click into “Border Inventory Manager”. Click on the “Locations” tab.



To see the list of all locations, click on the dropdown next to the Locations icon and make sure you have “All” selected. You can see each location listed and the also the assigned user for each location. This assignment ensures that only that particular user has access to all the inventory items located in that location. This way, they cannot change inventory for items in other locations that they are not supposed to access. A user can be assigned to multiple locations allows the user to control inventory from those assigned locations.

Optional: Turn on the Item Actions Tracking

To turn on the Item Action custom metadata type that tracks and logs all the inventory operations, go to Setup in your org, search for custom metadata types and click on “Manage Records” next to the “Inventory Manager” custom metadata type.

The screenshot shows the Salesforce Setup interface. At the top, there is a search bar with the text "Search Setup". Below it, the navigation bar includes "Setup", "Home", and "Object Manager". On the left sidebar, there is a search box containing "custom me" and a list of filters including "Custom Code" and "Custom Metadata Types". The main content area is titled "SETUP Custom Metadata Types" and displays a table of metadata types. The table has columns for Action, Label, Installed Package, Namespace Prefix, Visibility, and Api Name. The row for "Inventory Manager" is highlighted with a red border.

Action	Label	Installed Package	Namespace Prefix	Visibility	Api Name
Manage Records	Data Import Field Mapping	Nonprofit Success Pack	nsp	Public	nsp__Data_Import_Field_
Manage Records	Data Import Field Mapping Set	Nonprofit Success Pack	nsp	Public	nsp__Data_Import_Field_
Manage Records	Data Import Object Mapping	Nonprofit Success Pack	nsp	Public	nsp__Data_Import_Object
Manage Records	Data Import Object Mapping Set	Nonprofit Success Pack	nsp	Public	nsp__Data_Import_Object
Manage Records	Filter Group	Nonprofit Success Pack	nsp	Public	nsp__Filter_Group__mdt
Manage Records	Filter Rule	Nonprofit Success Pack	nsp	Public	nsp__Filter_Rule__mdt
Del Manage Records	Inventory Manager			Public	Inventory_Manager__mdt
Manage Records	Opportunity Stage To State Mapping	Nonprofit Success Pack	nsp	Public	nsp__Opportunity_Stage_
Manage Records	Rollup	Nonprofit Success Pack	nsp	Public	nsp__Rollup__mdt
Del Manage Records	Testing			Public	Testing__mdt


Click “Edit” next to “Log Item Actions”

Inventory Manager

View: All [Create New View](#)

Action	Label ↑	Inventory Manager Name
Edit Del	Log Item Actions	Log_Item_Actions

Check the “isEnabled” checkbox to turn ON the Item Actions interaction log. Similarly, uncheck it later if you want to turn it off.

 **SETUP**
Custom Metadata Types

Inventory Manager

Inventory Manager Edit [Save](#) [Save & New](#) [Cancel](#)

Information

Label

Inventory Manager Name [i](#)


isEnabled

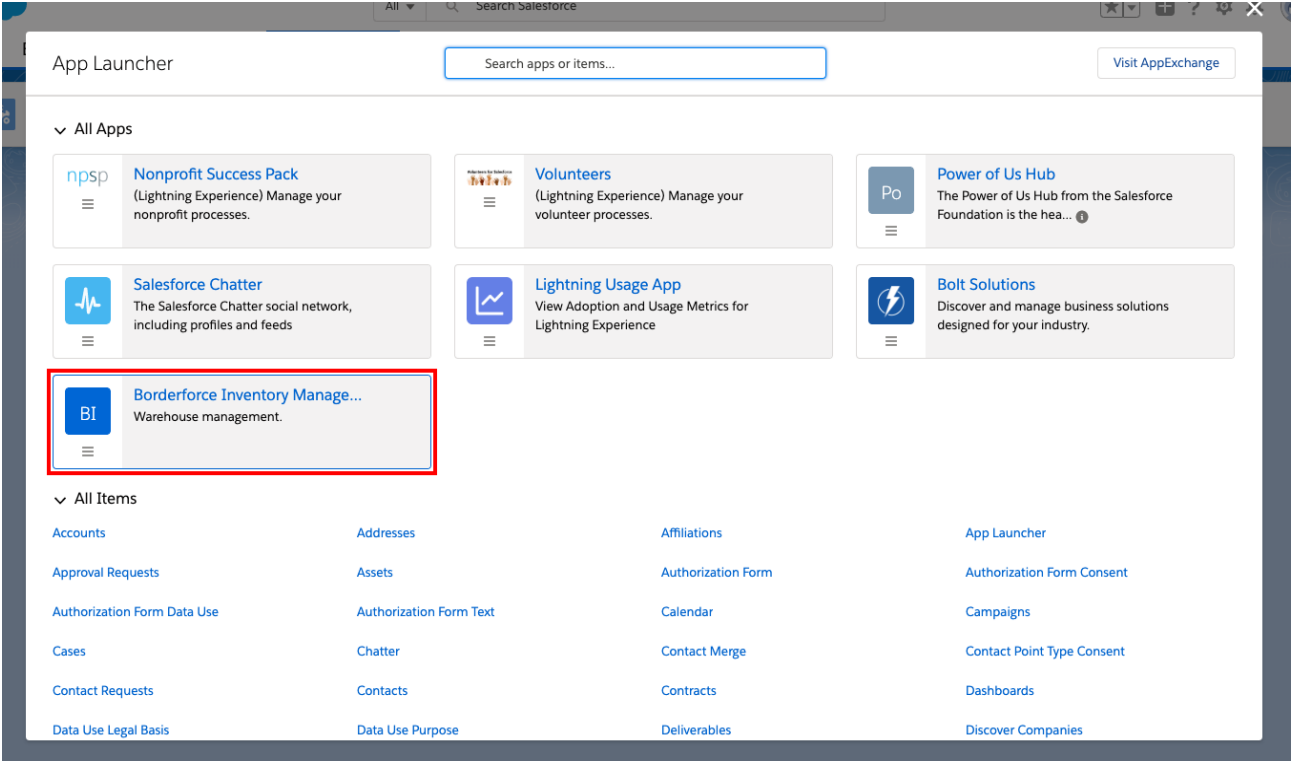
[Save](#) [Save & New](#) [Cancel](#)

User Workflow/ How to use the App

This workflow explains how a user can start using the application to manage the inventory.

1. Go to Inventory Management Lightning App

After all the setup steps are done, a user can access the app by clicking the App Launcher icon  and click the “**Border Inventory Manager**” App under “All Apps”



2. Click on the “Inventory Manager” Tab

After clicking on the Border Inventory Manager app, you will land on the Home page. Click on the “Inventory Manager” Tab to land on the inventory manager page. This is

where you can see the list of items depending on what location you are assigned to and perform certain actions on each item.

The screenshot displays the Salesforce Inventory Manager interface. At the top, there is a navigation bar with the Salesforce logo, a search bar labeled "Search Salesforce", and several utility icons (star, plus, question mark, bell, and profile). Below the navigation bar, the page title "Borderforce Invent..." is visible, followed by a breadcrumb trail: "Home", "Inventory Manager" (highlighted with a red box), "Items", "Locations", and "SubTypes".

The main content area is titled "Inventory Manager" and contains two buttons: "Create New Item" and "Refresh Data". Below these buttons is a table listing inventory items. Each row includes the item name, a quantity control interface (a plus/minus icon and a text input field), and the current quantity.

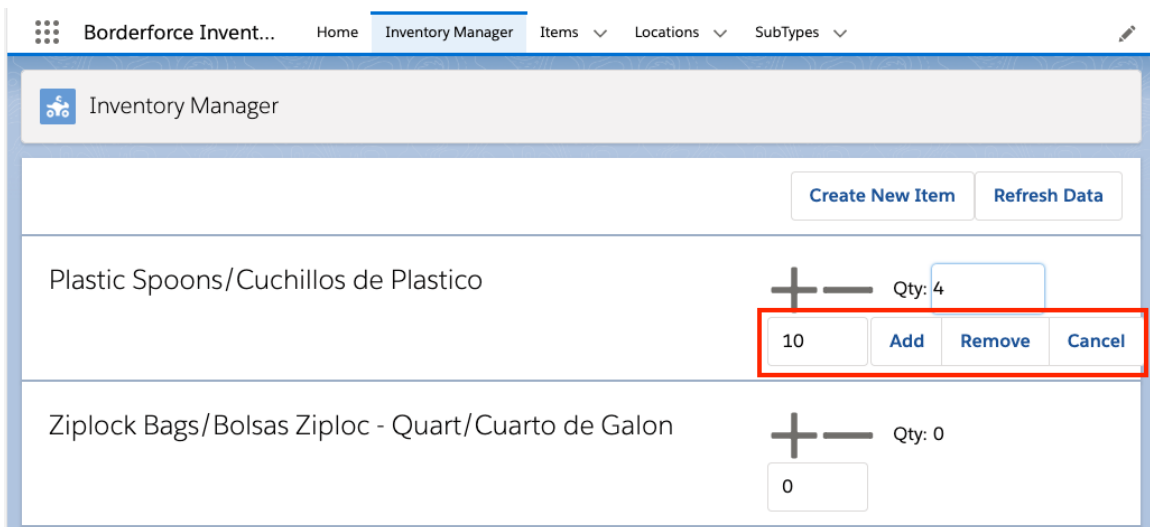
Item Name	Quantity Control	Current Quantity
Plastic Spoons/Cuchillos de Plastico	+ - 0	Qty: 4
Ziplock Bags/Bolsas Ziploc - Quart/Cuarto de Galon	+ - 0	Qty: 0
Plastic Forks/Tenedores de Plastico	+ - 0	Qty: 38
Black Garbage Bags/Bolsas de Basura	+ - 0	Qty: 0
8oz Cups/8 onzas Vasos de Plastico	+ - 0	Qty: 7

3. Perform Inventory Operations

On the Inventory Manager page, you will see the list of items depending on your assigned location. Take the above screenshot as an example. You can see there are 4 current counts of the Plastic Spoons in the inventory right now which is indicated by the “Qty:4” label. The 4 count can represent usually a box/unit or individual items.

Now, let’s assume a donation of 2 counts of the spoons come in and we need to update the inventory count, you can click on the “+” to add the item once and click it again to make sure you have added 2. Similarly, you can click “-” to remove items once they are checked out from the location.

This works well if you have to add or remove a few items. However, If there are multiple items, say 10, it takes too much time to press the + button 10 times. Instead, we have a text box next to Qty label where you can add a number. Using the same example, we will add 10 to the text box to indicate we want to add 10 more spoons. Now click anywhere outside the textbox and you will see 3 new buttons to ask if you want to add this quantity, remove this quantity, or cancel this operation if you feel this was in error.



If you are sure you want to update the count by 10, click the “Add” button to update it in the database and if you are not sure or made an incorrect input, press the cancel button to cancel the operation. Once you pressed Add, you will see a toast notification as a confirmation to notify the count of quantity you added successfully and the quantity of the spoons will be updated.

The screenshot shows the 'Inventory Manager' section of the Borderforce system. A green notification toast at the top indicates a successful operation: 'Success Quantity: Add: 10'. Below the notification, there are two inventory items listed:

- Plastic Spoons/Cuchillos de Plastico**: The quantity is 14, and a quantity input field contains the value 0.
- Ziplock Bags/Bolsas Ziploc - Quart/Cuarto de Galon**: The quantity is 0, and a quantity input field contains the value 0.

Buttons for 'Create New Item' and 'Refresh Data' are visible at the top right of the inventory list.

Validations are built into the system to notify you if you performed an operation which is not possible or logical. For example, if you try to input a negative number or try to remove an item count below 0, that operation will not be allowed and a notification toast will be displayed stating what is wrong. In this example, if you try to remove 4 quantities from the ziplock bags which are at 0, you will get an error message stating there are not enough quantities to remove.

The screenshot shows the 'Inventory Manager' section with an error notification toast: 'Enter Quantity Not enough quantity to remove'. The inventory items are the same as in the previous screenshot:

- Plastic Spoons/Cuchillos de Plastico**: Qty: 14, input field contains 0.
- Ziplock Bags/Bolsas Ziploc - Quart/Cuarto de Galon**: Qty: 0, input field contains 4. Below the input field are three buttons: 'Add', 'Remove', and 'Cancel'.

The error toast and the input field for the ziplock bags are highlighted with red boxes.

4. Manage Locations

If you want to add, remove, edit or manage locations, you can do so by going to the “Locations” tab. You will see a list of locations here, the assigned users at each location and the location type. Simply click the dropdown menu button next to each record to edit or delete the record. You can also add new locations by clicking “New”.

The screenshot displays the 'Locations' management interface in the Borderforce Inventory Manager. The top navigation bar includes 'Home', 'Inventory Manager', and 'Locations' (highlighted with a red box). Below the navigation, there are buttons for 'New' (highlighted with a red box), 'Import', and 'Change Owner'. The main area contains a table with the following data:

	Location Name ↑	Assigned User	Location ...
1	<input type="checkbox"/> Main Room	Tom Leddy	iPad
2	<input type="checkbox"/> Other	Peter Martin	iPad
3	<input type="checkbox"/> Warehouse Desk	Hemant Jawale	iPad
4	<input type="checkbox"/> Warehouse Door	Jaswinder Rattanpal	iPad

A dropdown menu is open for the first row, showing options: Edit, Delete, and Change Owner. The 'New' button and the dropdown menu are both highlighted with red boxes.

5. Manage Items

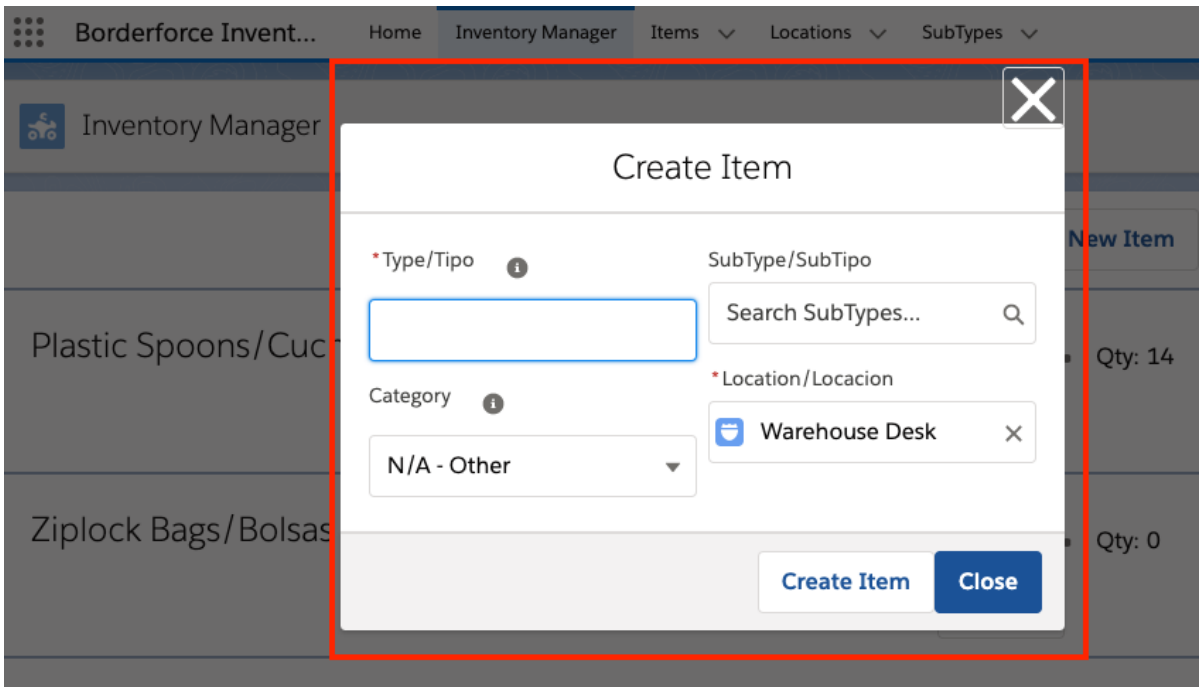
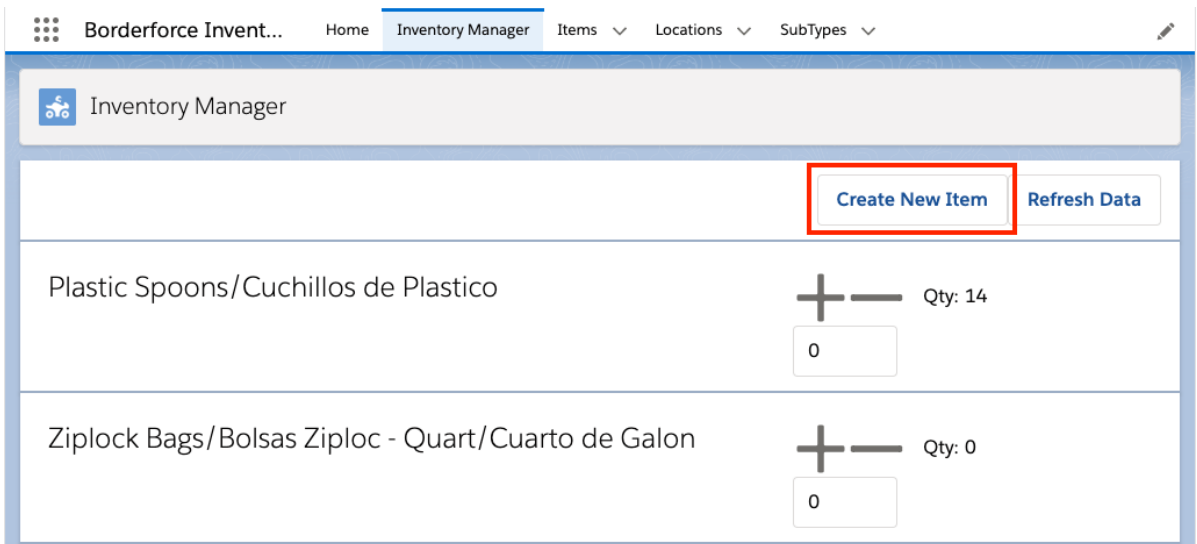
If you want to update, add or remove any items or see a list of items, go to the “Items” tab. Once on the Items tab, you can filter the list to show you All items or Recently viewed items. You can drill down into each item, edit or delete the item. You can also add items by clicking “New”. You can also add them from the Inventory Manager Page.

The screenshot displays the 'Items' management interface. At the top, the navigation bar includes 'Borderforce Invent...', 'Home', 'Inventory Manager', 'Items' (selected), 'Locations', and 'More'. Below the navigation, the page title is 'Items' with a 'Recently Viewed' filter selected. A 'New' button is visible. The main content area shows a list of 11 items, with the first four items visible. The columns are 'Item ID', 'Name/N...', 'Type/Tip...', 'Location/...', and 'SubType/...'. The first item has an ID of 000023 and is located in a Warehouse. A dropdown menu is open for the 'SubType' column of the first item, showing options: 'Edit', 'Delete', and 'Change Owner'.

	Item ID	Name/N...	Type/Tip...	Location/...	SubType/...
1	000023	Ziplock B...	Ziplock Ba...	Warehous...	Quart/Cu...
2	000029	Plastic Sp...	Plastic Sp...	Warehous...	
3	000025	Black Gar...	Black Gar...	Warehous...	
4	000028	8oz Cups...	8oz Cups/...	Warehous...	

6. Add New Items

As explained in the Manage Items sections above, you can add a new item by going to the Items tab. However, to make things easy and avoid extra clicks and moving around in the app, you can add new items from the Inventory Manager page. On the Inventory Manager page, click “Create New Item”. Once you click that, you will get a pop out window that lets you add all the details and create the item.



7. View Inventory Counts Dashboard and Documentation

If you go to the “Home” page, you can view a dashboard with all the important information. You can view all the inventory item counts for each location easily. There is also a report to show which items are running on a low count in the inventory and also out of stock items. You can also click into the documentation (this document) that will help any user get started to understand the application and how to use it.

The screenshot shows the Borderforce Inventory Manager dashboard. The top navigation bar includes 'Home', 'Inventory Manager', 'Items', 'Locations', 'SubTypes', and 'Files'. The dashboard is divided into several sections:

- Dashboard Inventory Counts:** A summary section with 'Open', 'Refresh', and 'Subscribe' buttons. It notes the data was last refreshed 2 days ago and is viewed as Tom Leddy.
- Documentation:** A red-bordered box containing a link to the 'Guide to Inventory Management App'.
- Item Count by Location:** A red-bordered box containing a horizontal bar chart showing the sum of counts for various items across different locations. A legend identifies locations: Warehouse Desk (blue), Other (light blue), Warehouse Door (purple), and Main Room (pink).
- Low Quantity Items:** A red-bordered box containing a table of items with low counts.
- Out of Stock Items:** A red-bordered box containing a table of items that are out of stock.

Item Name	Location	Sum of Count
Baby Wipes/T...	Other	22
Bottled Water...	Warehouse D...	52
Combs/Peines	Other	33
Conditioner/...	Other	3
Deodorant/D...	Other	50
Nitro Powder...	Warehouse D...	26
Plastic Forks/...	Warehouse D...	38
Plastic Spoon...	Warehouse D...	4
Razors/Afeita...	Other	5
Sanitary Pads...	Other	10
Shoelaces/Co...	Warehouse D...	2

Name/Nombre ↑	Locati...
8oz Cups/8 onzas Vasos de Plastico	Ware...
Conditioner/Acondicionador	Other
Plastic Spoons/Cuchillos de Plastico	Ware...
Razors/Afeitadoras	Other
Sanitary Pads/Toallas Sanitarias	Other
Shoelaces/Cordones de Zapatos	Ware...
Socks/Calcetines - Adult/Adultos	Main ...

Name/Nombre ↑	Locati...
3-4oz Cups/3-4 onzas Vasos de Plastico	Ware...
Black Garbage Bags/Bolsas de Basura	Ware...
Bowls/Tazones	Ware...
Clorox Bleach/Lejia Clorox	Other
Hair Ties/Ataduras para el Pelo	Other
Shampoo/Champu	Other
Shoes - Boy/Ninos	Ware...