Ideation Phase

Brainstorm & Idea Prioritization Template

Date	01 November 2025
Team ID	NM2025TMID04457
Project Name	Medical Inventory Management

Medical Inventory Management Template:

This guided Salesforce project focuses on developing a **Medical Inventory Management System** to efficiently track medicines, medical equipment, suppliers, and stock levels across healthcare facilities.
The system allows hospitals or clinics to monitor **available inventory, expiry dates, reorder levels, and supplier details** — ensuring uninterrupted medical supply chains.

It automates the workflow of **stock addition, update, and sales tracking**, minimizing manual errors and preventing overstocking or shortages.
Key features include:

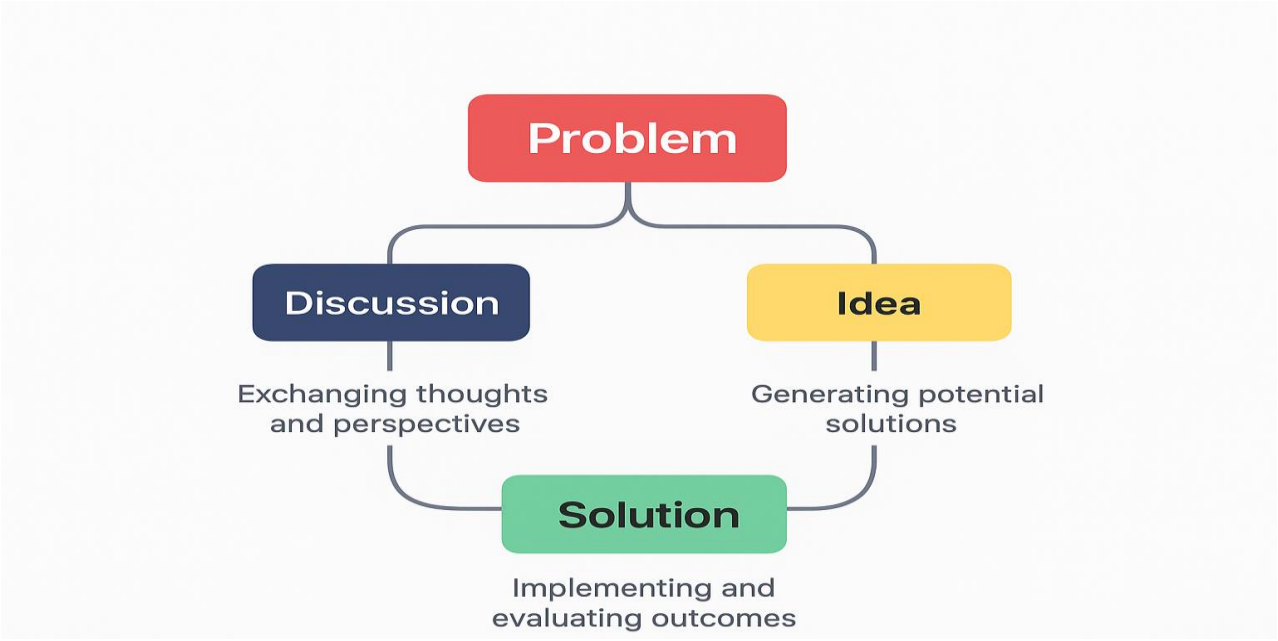
- **Inventory Object Setup:** Creating custom objects like *Medicine*, *Supplier*, *Stock Transaction*, and *Order Item*.
- **Flow Automation:** Updating stock levels automatically when sales or purchases occur.
- **Validation Rules:** Preventing the sale of expired or out-of-stock medicines.
- **Reports and Dashboards:** For real-time analysis of stock trends and purchase patterns.

This ensures **accurate, reliable, and efficient inventory control**, enhancing the management of critical healthcare resources.

Step-1: Team Gathering, Collaboration, and Problem Selection

The team collaborated to identify key challenges faced by healthcare facilities in managing their medical inventory.
The selected problem statement:

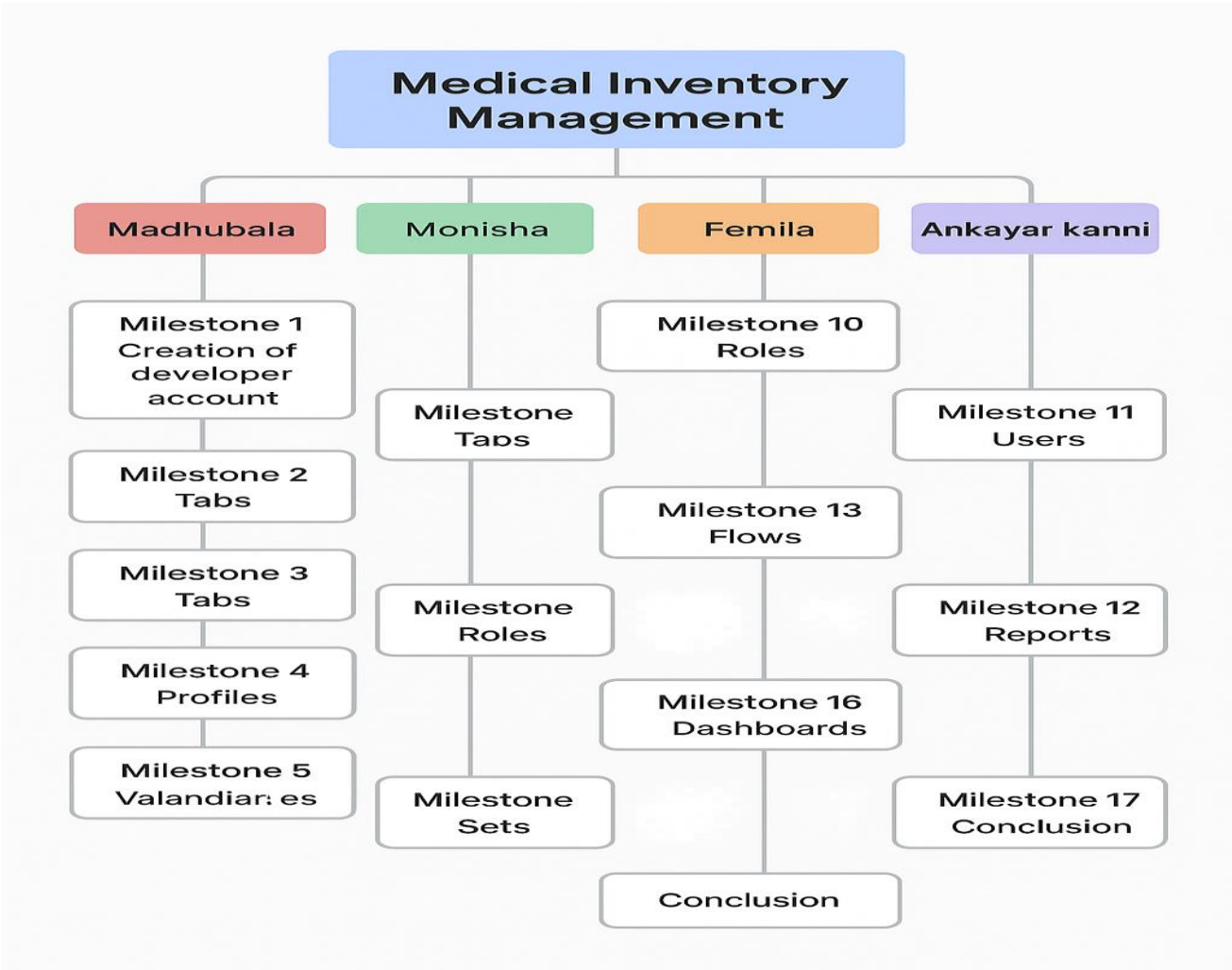
"To automate and manage the entire lifecycle of medical inventory — from procurement to consumption — using Salesforce."



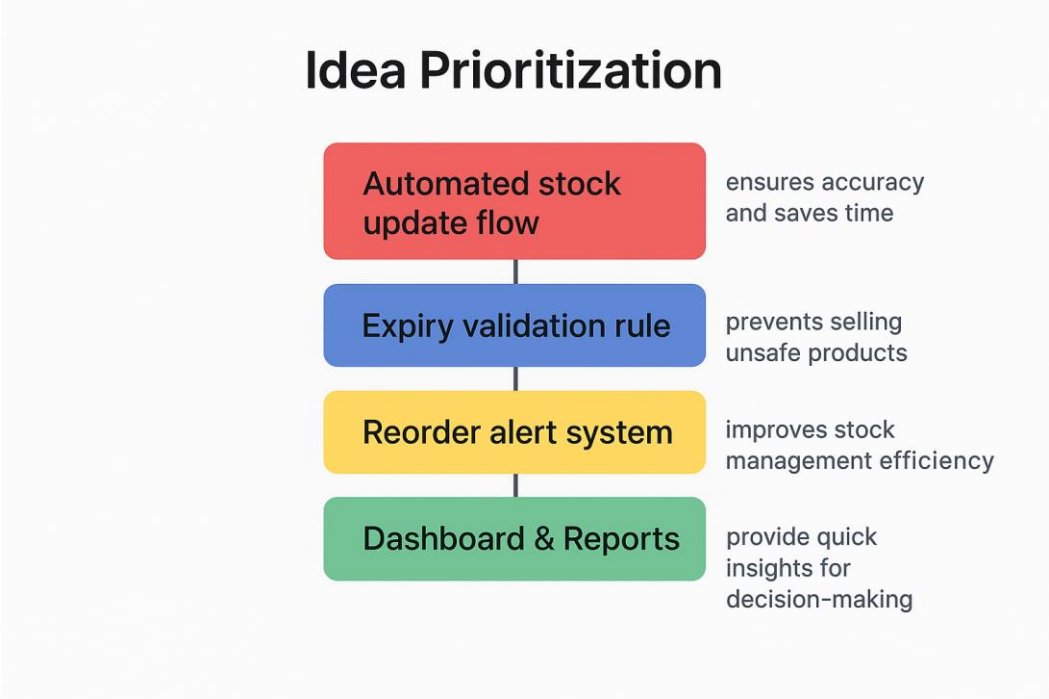
Reference:
https://www.mural.co/templates/brainstorm-and-idea-prioritization

Step-2: Brainstorm, Idea Listing, and Grouping

IDEA LISTING:



Step-3: Idea Prioritization



Idea Prioritization:

After evaluating feasibility and impact, the top priorities were chosen:

1. Automated stock update flow – ensures accuracy and saves time.
2. Expiry validation rule – prevents selling unsafe products.
3. Reorder alert system – improves stock management efficiency.
4. Dashboard & Reports – provide quick insights for decision-making.

By prioritizing these features, the project maintains a balance between automation, safety, and usability.

Visual workflows and diagrams were used to simplify communication and planning among the team.

This structured prioritization ensures that essential medical operations continue without interruption while maintaining compliance and safety standards.