

# Medical Inventory Management using Salesforce CRM

**Team ID:** LTVIP2025TMID31504

**Team Member:** Guntupalli Manasa (228A1A0465)

**College:** RISE Krishna Sai Prakasam Group of Institutions

---

## Abstract:

This project focuses on creating a centralized Salesforce-based CRM application for managing medical inventory. It is designed to help hospitals, clinics, and pharmacies track medicine stock, streamline restocking processes, automate notifications for low inventory, and analyze purchasing trends through insightful dashboards.

## Problem Statement:

Medical facilities often rely on manual inventory logs, resulting in missed reorders, stock-outs, and expired medicine. There is a need for a cloud-based CRM solution to ensure real-time tracking and better supply chain visibility.

## Objective:

- Build a CRM system to manage medicines, suppliers, and orders.
- Enable alerts for low stock.
- Automate order placement to suppliers.
- Provide reports and dashboards for data insights.

## Technology Stack:

- Salesforce CRM
- Custom Objects: Medicines, Suppliers, Orders
- Apex Triggers & Classes
- Lightning App Builder
- Flows & Process Builders
- Reports & Dashboards

## Modules:

1. Medicine Registration and Management
2. Supplier Management
3. Stock Monitoring
4. Automatic Reordering Flows
5. Reports and Dashboards

## **Salesforce Elements Used:**

- **Objects:** Medicines, Suppliers, Orders
- **Fields:** Quantity, Expiry Date, Supplier Name, Price
- **Apex Trigger:** To create order when stock falls below threshold
- **Flow:** Auto-notification to procurement officer
- **Validation Rules:** Expiry date must be future-dated
- **Dashboard:** Live view of stock and consumption trends

## **Sample Outputs:**

- Screenshot Placeholder: Medicine Inventory List
- Screenshot Placeholder: Reorder Alert Triggered
- Screenshot Placeholder: Monthly Usage Report
- Screenshot Placeholder: Dashboard Chart (Medicine Type vs Usage)

## **Testing:**

- Tested stock addition and depletion logic
- Verified that reorder triggers worked as expected
- Confirmed notification flow to responsible personnel
- Cross-checked dashboard accuracy for monthly trends

## **Conclusion:**

The medical inventory CRM system ensures hospitals and pharmacies can manage stock efficiently, automate reorders, and never run out of critical medicine. This improves patient care, reduces losses from expired stock, and enhances overall supply chain operations.

## **References:**

- Salesforce Trailhead
- SmartInternz Resources
- APSCHE CRM Guidelines