**💊 Project Name: MediTrack – Smart Chemist Shop Management Platform**

**📌 Project Description**

**MediTrack** is a Salesforce-based management platform designed for **small to medium chemist shops** to efficiently manage customers, medicine stock, retailers, and orders. The system ensures smooth day-to-day operations by tracking **medicine inventory, expiry dates, and customer orders**, while also automating **alerts and reports** for better decision-making.

The platform provides chemist shop owners with the ability to:

1. **Store and manage customer records** – including their details and purchase history.
2. **Record and manage orders** – linking customers with medicines purchased.
3. **Track stock of medicines** – including batch details, expiry dates, and quantity available.
4. **Maintain supplier/retailer details** – to keep a record of where medicines are procured.
5. **Get automated alerts** – when a medicine is about to expire or when stock levels are running low.
6. **Generate reports and dashboards** – to visualize sales trends, expiring stock, and customer purchase patterns.

**📊 Key Features**

1. **Customer Management**
   * Store customer details (name, phone, email, address).
   * View their purchase/order history.
2. **Retailer Management**
   * Record details of medicine suppliers (name, contact, location).
   * Track which retailer supplied which medicine batch.
3. **Medicine Inventory Management**
   * Store medicine details: Name, Batch Number, Price, Quantity, Expiry Date.
   * Monitor stock availability and expiry timelines.
4. **Order Management**
   * Create orders for customers with multiple medicines.
   * Auto-calculate total cost using roll-up summaries.
   * Track order status (Pending, Completed, Delivered).
5. **Expiry & Low Stock Alerts**
   * Automatic email alerts for medicines nearing expiry (e.g., 30 days before).
   * Notifications when stock quantity falls below a threshold (e.g., <10 units).
6. **Reports & Dashboards**
   * Medicines expiring soon.
   * Low stock medicines.
   * Top customers by total purchase.
   * Retailer-wise supply history.

**Phase 1: Problem Understanding & Industry Analysis**

**🔹 1. Requirement Gathering**

The primary requirement of chemist shops is to manage customers, medicine stock, and suppliers in a structured manner. Current systems are mostly manual or use basic billing software with limited features. Key needs identified include:

* Maintaining customer records and purchase history.
* Managing medicine inventory with batch and expiry details.
* Tracking retailers and purchase sources.
* Automated alerts for low stock and expiring medicines.
* Generating reports and dashboards for sales and inventory insights.

**🔹 2. Stakeholder Analysis**

* **Chemist Shop Owners** – Require a system to manage stock, avoid expired products, and improve efficiency.
* **Retailers/Suppliers** – Need visibility of supply records to maintain accountability.
* **Customers** – Expect availability of medicines and quick, error-free billing.
* **Employees/Staff** – Require easy-to-use tools for managing orders and inventory.

**🔹 3. Business Process Mapping**

Current workflow in a chemist shop involves:

* Purchasing medicines from multiple retailers.
* Storing them with batch numbers, prices, and expiry dates.
* Selling to customers manually while maintaining bills.
* Tracking stock manually, often missing expiry alerts.

**MediTrack** streamlines this by automating customer order handling, medicine inventory tracking, supplier management, and reporting through Salesforce.

**🔹 4. Industry-Specific Use Case Analysis**

Pharmaceutical retail faces common challenges like expired stock, manual errors, lack of sales insights, and inefficient supplier tracking. With healthcare regulations requiring strict expiry management, a Salesforce-based platform like **MediTrack** ensures compliance and minimizes losses. Use cases include:

* Automated expiry notifications.
* Low stock alerts to avoid shortages.
* Retailer-wise supply history tracking.
* Customer order history for loyalty analysis.

**🔹 5. AppExchange Exploration**

Salesforce AppExchange offers pharmacy and retail management apps, but most are designed for large-scale businesses or hospitals. **MediTrack** differentiates itself by focusing specifically on small-to-medium chemist shops with simple, customizable, and cost-effective solutions. Exploration of apps like “Pharma Cloud” and “Inventory Manager” provided insights into features such as stock automation and expiry alerts, which inspired similar functionality in MediTrack.