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

**Problem Statement**

Chemist shops often face problems like difficulty in tracking medicine stock, missing expiry dates, poor supplier management, and lack of proper records for customers and their orders. These issues cause losses, stock shortages, and customer dissatisfaction. To solve this, a simple system is needed that can store customer, retailer, and medicine details, track expiry dates, send alerts for low stock, and generate useful reports. **MediTrack** provides this solution using Salesforce.

**Objectives**

1. To store and manage customer, retailer, and medicine details in one system.
2. To track medicine stock with batch numbers and expiry dates.
3. To send automated alerts for low stock and near-expiry medicines.
4. To generate reports and dashboards for better sales and inventory insights.

**📌 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.

**Phase two: Org Setup & Configuration**

 Organization & App Setup

* Configured Salesforce Dev Org for MediTrack.
* Created a custom app: MediTrack to manage medicines, retailers, and customers.
* Set up user access policies, profiles, roles, and permission sets for secure data handling.

 Custom Objects & Fields

* Customers Object
  + Fields: CustomerName, CustomerEmail, CustomerPhone.
* Retailers Object
  + Fields: Name, PhoneNumber, Address, LicenseNumber.
* Medicines Object
  + Fields: Category (Picklist: Tablet, Syrup, Injection, etc.), StockQuantity, and other medicine-related details.

 Custom Tabs

* Created tabs for navigating these objects inside the MediTrack app (Customers, Retailers, Medicines).

 Security & Data Access

* Applied profiles and permission sets to give appropriate access to users.

 Deployment & Environments

* Some objects and configurations have been deployed/tested.
* Sandbox/Change Set basics considered for future deployments.