Project Title: Smart Pharmacy Inventory Tracker

Problem Statement:

Pharmacies often face challenges in managing their medicine stock efficiently. Manual processes such as maintaining registers or spreadsheets lead to frequent problems like:

- Selling expired medicines.

- Stockouts of essential drugs due to delayed reordering.

- Over-ordering leading to wastage and financial losses.

- Difficulty in tracking supplier performance and delivery timelines.

- Lack of centralized dashboards for managers to view sales, stock, and expiry trends.

To address these issues, we propose a Smart Pharmacy Inventory Tracker built on Salesforce. The system will help pharmacists and managers to:

- Monitor stock levels in real-time.

- Track expiry dates and receive alerts for soon-to-expire medicines.

- Automate reorder requests when stock falls below threshold levels.

- Maintain supplier records and measure performance.

- Generate dashboards and reports for effective decision-making.

❖ **Requirement Gathering:**

- Collect details from pharmacists and managers on current stock tracking methods.
- Identify pain points in manual processes (e.g., mismanagement, expiry, over-ordering).
- Define requirements for:

  ☐ Pharmacists (update stock, issue medicines).

  ☐ Managers (view dashboards, approve reorders, monitor sales).

  ☐ Suppliers (receive orders, update delivery timelines).

- Capture reporting needs such as:

  ☐ Expiry Alerts.

  ☐ Sales by Category.

  ☐ Low Stock Reports.

❖ **Stakeholder Analysis:**

- **Pharmacists/Employees** – Record sales, issue medicines, update stock.
- **Managers/Owners** – Approve purchases, monitor dashboards, track sales and stock trends.
- **Suppliers** – Provide medicines and maintain timely delivery.
- **Salesforce Admin/IT** – Configure objects, manage users, maintain system.

❖ **Business Process Mapping:**

Current Process (Manual):

1. Pharmacist issues medicine → updates register/spreadsheet.
2. Manager manually checks stock and expiry → calls suppliers.

3. Reports generated manually → often delayed and inaccurate.

Desired Salesforce Process:

1. Pharmacist issues medicine → stock auto-updated in Salesforce.
2. System checks expiry and low stock levels → sends alerts.
3. Auto reorder case created and sent to suppliers.
4. Manager dashboards update in real time.

❖ <u>Industry-specific Use Case Analysis:</u>

- Pharmacies need automated alerts to prevent sale of expired medicines.
- Standard practices include maintaining minimum stock thresholds, expiry alerts, and supplier performance tracking.
- Regulatory compliance requires accurate stock records for audits.

❖ <u>AppExchange Exploration:</u>

- Explore Pharmacy/Inventory Management apps on Salesforce AppExchange for ready-to-use ideas like expiry dashboards, reorder alerts, barcode scanning.
- Reuse free components (e.g., Calendar widgets for expiry, Notification add-ons for alerts).
- Leverage prebuilt dashboards and LWC components to save time instead of building everything from scratch.