**Phase 1 Report — Pharmacy Delivery CRM**

**Goal:** Understand what we’re building and why.

**1. Requirement Gathering**

**Stakeholder Interviews:**

* **Pharmacy Manager:** Wants visibility into all active orders, deliveries, and inventory; wants reports to analyze revenue and delivery efficiency.
* **Pharmacists:** Need to verify prescriptions, update order statuses, and prevent dispensing errors.
* **Delivery Staff:** Need clear assignment of deliveries, schedule tracking, and confirmation of completed deliveries.
* **Customers:** Want to place orders easily, track delivery status, and receive timely notifications.

**Functional Requirements:**

1. Track all medicine orders with real-time status (Pending, Verified, Out for Delivery, Delivered).
2. Allow customers to place orders online or via form.
3. Enable pharmacists to review, verify, or reject prescriptions.
4. Allow dispatchers to assign delivery riders and schedule delivery times.
5. Prevent duplicate or overlapping deliveries for the same rider.
6. Attach prescription files (PDF, image) to orders.
7. Generate reports:
   * Pending orders by day
   * Verified vs Rejected prescriptions
   * Delivery performance (time to deliver)
8. Notify customers about order status (Pending → Verified → Out for Delivery → Delivered).

**Non-functional Requirements:**

* Simple, intuitive UI (Lightning Experience) for all users.
* Role-based access control for security.
* Support up to 100 orders per day for small-medium pharmacies.
* Fast response time (< 2 seconds for record retrieval).

**2. Stakeholder Analysis**

| **Stakeholder** | **Role / Responsibilities** | **Pain Points / Needs** |
| --- | --- | --- |
| Admin | Configure Salesforce, manage flows, dashboards, and permissions | Needs simple setup, minimal maintenance |
| Pharmacist | Verify/reject prescriptions, update order status | Wants clear workflow; prevent errors in medicine dispensing |
| Dispatcher / Delivery Manager | Assign riders, track deliveries, monitor status | Needs to avoid overlapping deliveries and track rider availability |
| Delivery Rider | Update delivery status, confirm delivery | Needs easy mobile interface; minimal manual entry |
| Customer | Place orders, track status | Wants order confirmation, delivery notifications, timely service |
| Manager | Monitor operations, view reports | Needs analytics for decision-making, revenue tracking, and delivery efficiency |

**Insights:**

* Clear division of responsibilities reduces errors.
* Automation (Flows, email notifications) reduces manual work and increases reliability.

**3. Business Process Mapping**

**Process Flow (Detailed):**

1. **Customer places order** → enters personal details, medicines, uploads prescription.
2. **Pharmacist receives order** → checks prescription validity.
   * If valid → mark Verified
   * If invalid/missing → Reject & notify customer
3. **Dispatcher reviews verified orders** → assigns delivery rider and schedule.
4. **Rider executes delivery** → updates status: Out for Delivery → Delivered
5. **System updates dashboard** → generates report metrics, notifies manager & customer

**Visual Flow (Text Diagram):**

Customer → Order Entry → [Pending]

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Pharmacist Verification

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Verified Rejected

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Dispatcher assigns Rider Notify Customer

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Rider delivers → Updates Status (Out for Delivery → Delivered)

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System Dashboard & Reports → Manager & Customer Notifications

**Notes:**

* Validation rules prevent overlapping deliveries for a rider.
* Notifications can be sent via email or internal Salesforce alerts.
* All actions logged for audit purposes.

**4. Industry-specific Use Case Analysis**

**Pharmacy Delivery Industry Context:**

* Medicines are perishable and require accurate stock management.
* Prescription verification is mandatory by law for certain medicines.
* Timely delivery is critical for customer health and satisfaction.
* Delivery logistics must consider availability of riders, distance, and route efficiency.

**Key Takeaways for CRM Design:**

* Track order status accurately.
* Automate prescription verification workflow.
* Automate delivery assignment with status updates.
* Generate operational metrics for performance and decision-making.

**Challenges in Industry:**

* Manual tracking leads to delayed or missed deliveries.
* Lack of centralized system causes repeated phone calls and errors.
* Regulatory compliance requires audit trail of prescriptions and delivery confirmations.

**5. AppExchange / Competitive Analysis**

* **Existing Solutions:** There are full-scale pharmacy delivery apps on AppExchange and third-party platforms.
* **Limitations for Learning:**
  + Many are subscription-based and complex.
  + May include unnecessary features (inventory management, e-prescribing, accounting).
* **Our Approach:**
  + Build a **custom Salesforce solution**.
  + Focus on learning Salesforce features:
    - Custom objects (Orders, Prescription, Delivery)
    - Screen Flows for order creation, verification, and assignment
    - Dashboards & Reports for tracking KPIs
  + Keep it **lightweight and demo-friendly**.

**6. Insights & Conclusions (Phase 1 Summary)**

* Requirements are clear, prioritized for MVP functionality.
* Stakeholder analysis ensures all users’ needs are addressed.
* Business process mapping identifies critical workflows and status transitions.
* Industry context justifies the need for automation and proper tracking.
* Competitive analysis confirms that a **custom Salesforce app** is both feasible and educational.

**Next Steps (Phase 2):**

* Design Salesforce objects, fields, page layouts, and flows.
* Configure dashboards, reports, and notifications.
* Implement 3-day MVP plan with sample data for demonstration.