MEDICAL INVENTORY MANAGEMENT

Project Planning phase

TEAM ID	NM2025TMID07179
PROJECT NAME	MEDICAL INVENTORY MANAGEMENT
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1. Introduction

The **Project Planning Phase** is a critical stage in the software development life cycle where the foundation for project execution is laid. It involves defining objectives, identifying resources, outlining deliverables, estimating timelines, and determining the tools and technologies to be used.
In the context of **Medical Inventory Management in Salesforce**, this phase focuses on planning how to design and implement a system that efficiently tracks, monitors, and manages medical supplies, medicines, and equipment within healthcare institutions.

2. Objective of the Project Planning Phase

The main objectives of this phase include:

- To define the **scope** and **goals** of the medical inventory management system.
- To prepare a **project roadmap** with milestones, deliverables, and deadlines.
- To identify the **resources** required (technical tools, manpower, budget).
- To establish **roles and responsibilities** for team members.
- To determine **risk management**, **quality assurance**, and **testing strategies**.

3. Scope Definition

The scope outlines what the system will accomplish using Salesforce features:

- Creation of **custom objects** for Medicines, Suppliers, Purchase Orders, and Inventory.
- Development of **automation workflows** and **Apex triggers** for real-time updates.
- Implementation of **approval processes** for stock requests and purchase orders.
- Generation of **reports and dashboards** to monitor stock levels, expiry alerts, and usage.
- Integration with external systems (if necessary) for supplier data or hospital ERP.

4. Resource Planning

To ensure the project runs smoothly, planning includes:

- **Human Resources:** Project manager, Salesforce developer, tester, and system analyst.
- **Technical Resources:** Salesforce CRM, Apex programming tools, Flow builder, Reports, Dashboards.
- **Time and Budget:** Estimations are made for development, testing, and deployment activities.

5. Work Breakdown Structure (WBS)

The project is divided into smaller, manageable tasks such as:

1. Requirement Gathering
2. System Design
3. Development of Custom Objects and Fields
4. Automation Setup (Flows, Triggers)
5. UI Customization (Lightning App Pages)
6. Testing and Validation
7. Deployment and User Training

Each task is assigned to responsible team members with clear timelines.

6. Risk and Quality Management

During planning, potential risks are identified:

- Data inconsistency due to improper configuration
- Integration failures with external systems
- User adoption issues

To mitigate these, quality control strategies include:

- Conducting unit and system testing
- Ensuring proper data validation rules
- Providing end-user training

7. Timeline and Milestones

The project timeline is structured into phases:

Phase	Duration	Deliverable
Requirement Analysis	1 week	SRS Document
System Design	1 week	ER Diagram & Flow Model
Development	2 weeks	Custom Objects & Automation
Testing	1 week	Test Reports
Deployment	1 week	Live Salesforce App

8. Expected Outcomes

- A well-defined **project blueprint** for system development.
- Clarity on roles, timelines, and deliverables.
- Reduced development risk due to structured planning.
- Assurance that all features align with healthcare inventory needs.

9. Conclusion

The **Project Planning Phase** ensures that the Medical Inventory Management System in Salesforce progresses with clear direction and control. It provides a strategic roadmap for development, resource allocation, and quality assurance, ensuring the successful implementation of a reliable, efficient, and automated inventory management solution for medical institutions.