

MEDICAL INVENTORY MANAGEMENT

Ideation Phase Report

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PROJECT NAME	MEDICAL INVENTORY MANAGEMENT
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1. Introduction

The **Ideation Phase** is the initial and most creative stage of the project development life cycle. In this phase, the main goal is to identify challenges, explore possible solutions, and conceptualize how Salesforce can be leveraged to build an efficient **Medical Inventory Management System (MIMS)**. It involves brainstorming, problem definition, and generating innovative ideas that align with healthcare inventory needs.

2. Problem Identification

The medical industry often faces challenges such as:

- Overstocking or shortage of medicines and equipment
- Lack of real-time inventory tracking
- Manual errors in data entry and stock updates
- Inefficient supplier management
- Delayed restocking and order processing

These issues can lead to operational inefficiencies, increased costs, and delayed patient care. Thus, an automated, cloud-based system like Salesforce can optimize inventory processes.

3. Goal of the Ideation Phase

The main goals of the ideation phase are to:

- Define the scope of the Medical Inventory Management project.
- Identify user needs such as hospitals, pharmacies, and suppliers.
- Determine the functionalities to be implemented using Salesforce tools.
- Generate innovative ideas for managing stock levels, expiry alerts, supplier orders, and analytics through Salesforce automation.

4. Brainstorming and Idea Generation

During brainstorming sessions, the project team discusses various Salesforce features that can be integrated, such as:

- **Custom Objects** for Medicines, Suppliers, Purchase Orders, and Inventory Logs.
- **Automation Tools** (Flows, Triggers, and Process Builders) for auto-updates on stock levels.
- **Reports and Dashboards** for real-time insights into stock status, sales, and usage trends.
- **Apex Classes** for advanced logic such as expiry date notifications or reorder calculations.
- **Integration** with external healthcare systems or ERP solutions.

5. Feasibility and Conceptualization

Each idea is evaluated based on:

- **Technical Feasibility:** Can Salesforce handle data volume and complexity?
- **Economic Feasibility:** Is it cost-effective for medical institutions?
- **Operational Feasibility:** Will it improve day-to-day efficiency?

After evaluation, a **concept model** of the Salesforce-based Medical Inventory System is prepared — defining modules, relationships, automation logic, and user roles (Admin, Pharmacist, Supplier, etc.).

6. Output of Ideation Phase

The output of this phase includes:

- A clearly defined **problem statement and solution concept**.
- A list of **key features** to be implemented in Salesforce (Inventory Tracking, Auto Reorder, Expiry Alerts, Supplier Management).
- A preliminary **system architecture diagram**.
- An initial **project roadmap** for the next design and development phases.

7. Conclusion

The ideation phase lays the **foundation of innovation and clarity** for the Medical Inventory Management System. By using Salesforce's powerful CRM, automation, and analytics capabilities, the proposed solution aims to create a **centralized, error-free, and intelligent platform** for managing medical supplies efficiently across healthcare institutions.