

Project Title: Mediswift - Hyperlocal Medicine Delivery CRM

➤ Problem Statement:

The online pharmacy market is growing rapidly, yet most existing providers primarily cater to bulk medicine orders and operate on a delivery model that takes several days to fulfil. This creates a critical gap for customers who need urgent, small, and time-sensitive medicine orders fulfilled within minutes.

Currently, customers lack a seamless way to:

- Check real-time inventory of nearby pharmacies
- Place immediate orders
- Get fast delivery with live tracking

This gap leads to:

- Missed sales opportunities for pharmacies
- Poor customer experience
- Potential delays in treatment for patients

➤ Proposed Solution:

A Salesforce-powered CRM platform designed to streamline the urgent medicine delivery process by providing:

- Real-time pharmacy inventory visibility for customers and staff
- Intelligent order allocation to the nearest available pharmacy
- Delivery partner assignment
- Automated notifications to keep customers updated at every stage
- Analytics and dashboards to optimize pharmacy operations and demand forecasting

Such a solution would help pharmacies maximize sales, enhance customer satisfaction, and meet the growing demand for hyperlocal medicine delivery.

➤ Industry:

For Mediswift: Hyperlocal Medicine Delivery CRM, the most appropriate industry would be: Healthcare & Life Sciences

This is because:

- It deals with medicine delivery → falls under pharma & healthcare
- The CRM aspect + real-time inventory & logistics → makes it a HealthTech / PharmaTech solution

➤ **Target Users:**

Target Users will be as follows:

1. Pharmacy Owners & Staff–
 - To manage real-time inventory
 - Accept and fulfil incoming orders quickly
 - Track delivery performance and sales
2. Customers / Patients –
 - To search for medicines
 - Place urgent orders
 - Track delivery status
3. Delivery Partners –
 - To receive delivery assignments
 - Update order status (picked up, delivered)

➤ **Use Cases:**

Use cases will be as follows:

1. Real-Time Inventory Management (Pharmacy Staff / Admins)
 - Add, update, and track medicine stock levels.
 - Receive alerts for low stock or expiring medicines.
2. Order Placement & Management (Customers & Pharmacies)
 - Customers search for medicines and place urgent orders.
 - Pharmacies receive, confirm, and process orders efficiently.
3. Intelligent Order Allocation (System / CRM)
 - Automatically assign orders to the nearest pharmacy with available stock
 - Optimize order fulfilment to reduce delivery time.
4. Delivery Partner Assignment & Tracking (Delivery Staff / System)
 - Assign delivery partners based on proximity and availability.
 - Enable live tracking of delivery progress for customers and pharmacies.
5. Automated Notifications & Alerts (Customers & Pharmacies)
 - Notify customers about order confirmation, dispatch, and delivery.
 - Alert pharmacies and delivery partners of new orders and updates.
6. Analytics & Reporting (Pharmacy Admins)
 - Track sales trends, order volumes, and customer demand.
 - Generate reports to improve inventory management and operational efficiency.
7. Customer Feedback & Refill Reminders (Customers)
 - Collect customer ratings and reviews.
 - Send automated reminders for recurring medicine refills.
8. Prescription Management (Optional / Future Scope)
 - Upload and validate prescriptions for prescription-only medicines.
 - Ensure regulatory compliance.

➤ Functional Requirements:

For Customers:

- Search for medicines by name, composition, or prescription.
- View real-time stock availability at nearby pharmacies.
- Place urgent orders and select delivery options.
- Track order status in real time (confirmation, dispatch, delivery).
- Receive automated notifications and alerts.
- Rate the delivery and provide feedback.

For Pharmacies Staff:

- Add, update, and manage medicine inventory.
- Receive and confirm orders assigned by the system.
- Assign orders to delivery partners manually or automatically.
- View order history and generate daily/weekly reports.
- Receive alerts for low stock, expiring medicines, and urgent orders.

For Delivery Partners:

- Receive delivery assignments from the system.
- Update order status (picked up, in transit, delivered).
- Use GPS navigation to optimize delivery routes.

System / CRM Requirements:

- Real-time inventory synchronization across pharmacies.
- Intelligent order allocation based on proximity and stock availability.
- Automated notifications via email, SMS, or app push notifications.
- Analytics dashboard for sales trends, demand forecasting, and performance metrics.
- User authentication and role-based access control.
- Optional: Prescription validation for regulated medicines.

➤ Stakeholder Analysis:

Stakeholder	Role	Key Interest	Impact
Customers / Patients	Place medicine orders	Fast delivery, accurate stock info, smooth app experience	High
Pharmacy Owners / Staff	Manage inventory & orders	Efficient operations, more sales, fewer stock-outs	High
Delivery Partners	Deliver medicines	Clear assignments, optimized routes, timely payments	Medium

➤ AppExchange Exploration:

1. Salesforce Maps (formerly MapAnything): Geolocation, route optimization, and live tracking of deliveries.
2. Twilio for Salesforce / SMS Magic: Automates SMS notifications and alerts.
3. Salesforce Inventory & Order Management (Salesforce Labs): Real-time inventory tracking, order capture, and fulfilment automation.
4. Einstein Analytics / Tableau CRM (Optional, Advanced): Advanced analytics and dashboards.

➤ Salesforce Editions:

Edition Used: Salesforce Developer Edition (Free)

The **Developer Edition** provides a fully functional Salesforce environment with:

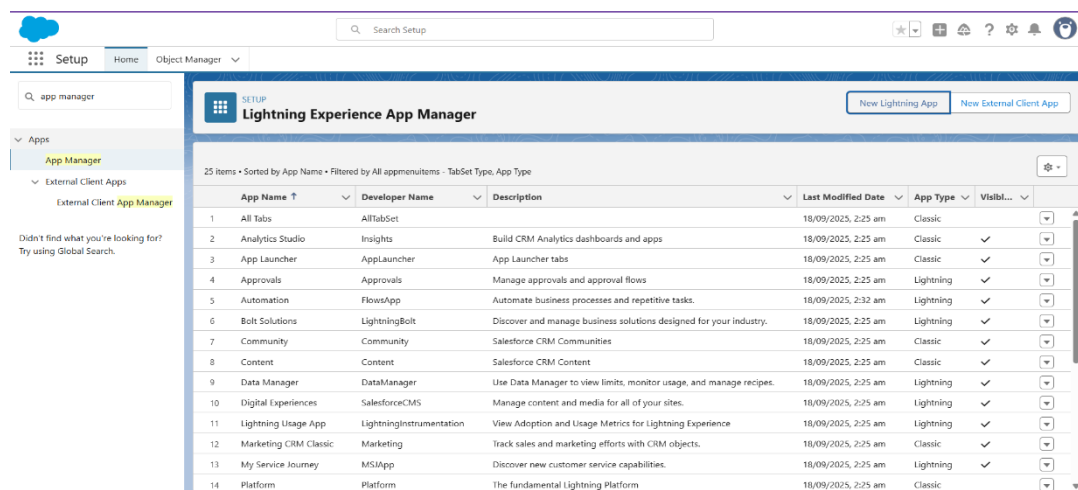
- Access to Salesforce CRM Core features (Leads, Accounts, Contacts, Opportunities, etc.).
- Customization tools like Objects, Fields, Flows, Validation Rules, and Reports.
- Apex and Lightning Components development capability.
- API access for integrations.

➤ Lightning App Creation – MediSwift

Objective: To create a dedicated **Lightning App** named *MediSwift* for managing medicines, pharmacies, orders, and deliveries efficiently within Salesforce.

Steps to Create the Lightning App:

- Step 1: From Setup, search and open App Manager.
- Step 2: Click New Lightning App button.



- Step 3: Enter app details.

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ¹
MediSwift

* Developer Name ¹
MediSwift

Description ¹
A Salesforce Lightning App for managing medicine inventory, customer orders, and deliveries.

App Branding

Image ¹
MediSwift
Clear

Primary Color Hex Value ¹
#0070D2

Org Theme Options
☐ Use the app's image and color instead of the org's

Next

12	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	18/09/2025, 2:25 am	Classic	✓
13	My Service Journey	MSIApp	Discover new customer service capabilities.	18/09/2025, 2:25 am	Lightning	✓
14	Platform	Platform	The fundamental Lightning Platform	18/09/2025, 2:25 am	Classic	✓

- Step 4: Select Standard Navigation for CRM-like experience.

New Lightning App

App Options

Navigation and Form Factor ¹

* Navigation Style
☒ Standard navigation
☐ Console navigation

* Supported Form Factors
☒ Desktop and phone
☐ Desktop
☐ Phone

Setup and Personalization ¹

Setup Experience
☒ Setup (full set of Setup options)
☐ Service Setup

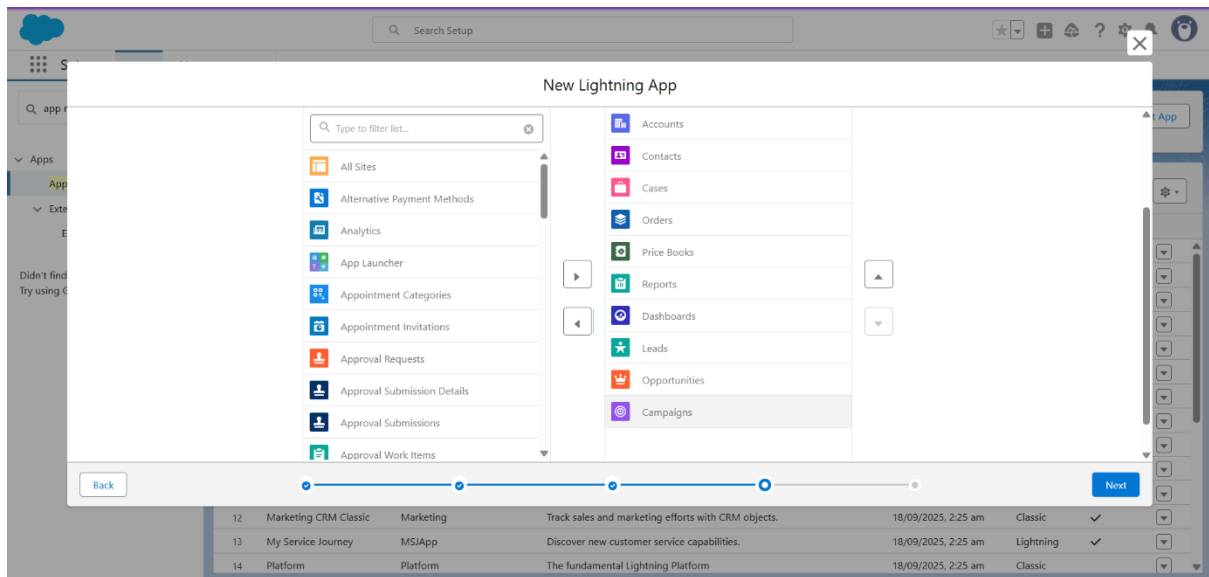
App Personalization Settings
☐ Disable end user personalization of nav items in this app
☐ Disable temporary tabs for items outside of this app
☐ Use Omni-Channel sidebar

Back

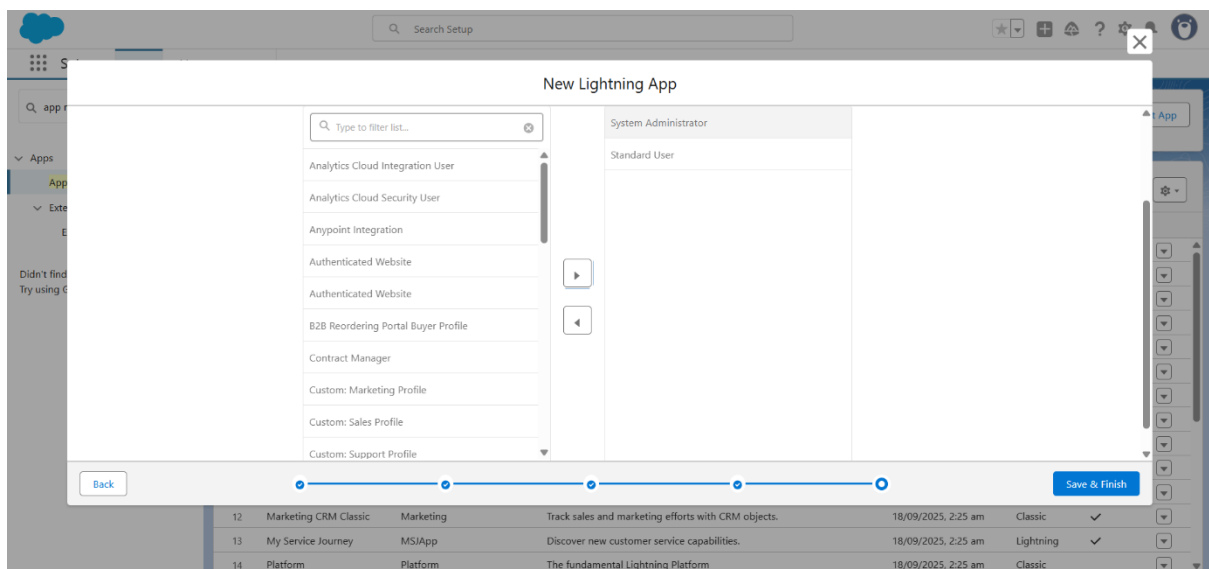
Next

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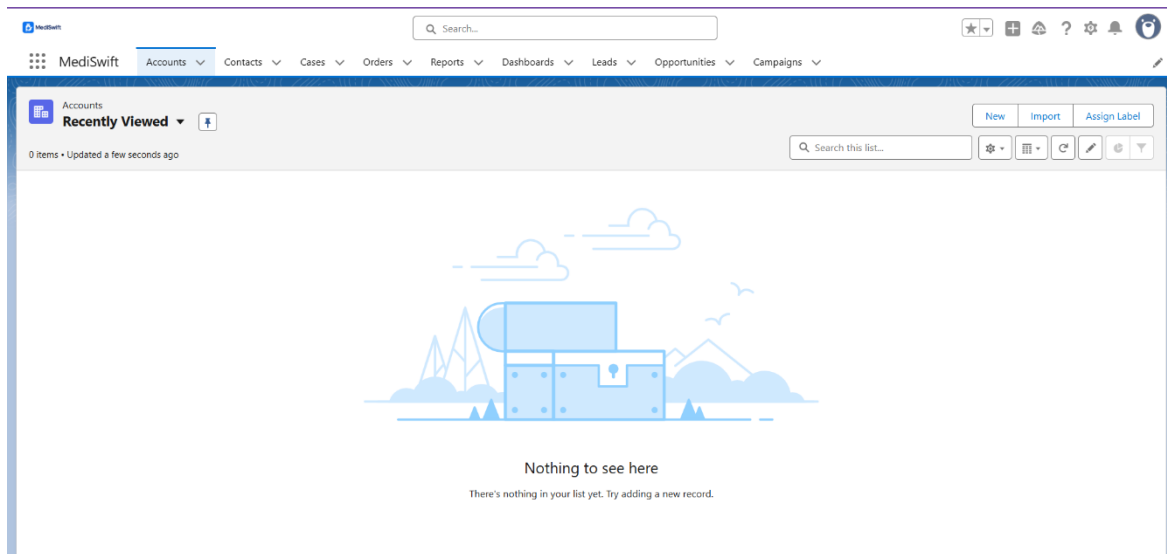
- Step 5: Add standard objects like Accounts, Contacts, Products, Orders, Reports, Dashboards.



- Step 6: Assign System Administrator profile for access.



- Step 7: click Save & Finish. Launch the app from App Launcher.



➤ Company Profile Setup

Objective: To configure the organization details in Salesforce to align with MediSwift's business information.

Steps:

- Step 1: Go to Setup → Search for Company Information.
- Step 2: Click Edit on the Company Information page. Fill the following details.
 - Organization Name: MediSwift
 - Primary Contact: Apurva Dolas
 - Street: Sai Nagar, Amravati
 - City: Amravati
 - Zip/Postal Code: 444607
 - State/Province: Maharashtra
 - Country: India
- Step 3: Set Locale Settings
 - Default Locale: English (India)
 - Default Language: English
 - Default Time Zone: (GMT+05:30) India Standard Time

- Step 4: Set Currency Settings
 - Currency Locale: English (India) – INR
- Step 5: Click **Save** to apply organization settings.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "company information" and a list of settings including "Company Settings" and "Company Information". The main content area is titled "Company Information" and contains the "Organization Edit" form. The form is divided into sections: "General Information", "Address", "Locale Settings", and "Currency Settings".

General Information:

- Organization Name: MediSwift
- Primary Contact: Apurva Dolas
- Division: (empty)
- Phone: (empty)
- Fax: (empty)

Address:

- Street: SAI NAGAR, AMRAVATI
- City: Amravati
- Zip/Postal Code: 444607
- State/Province: Maharashtra
- Country: India

Locale Settings:

- Default Locale: English (India)
- Default Language: English
- Default Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)

Currency Settings:

- Currency Locale: English (India) - INR

➤ Business Hours and Holidays

Objective: To configure MediSwift's standard business hours and holidays in Salesforce.

Business Hours Setup:

- Step 1: Go to **Setup** → search for **Business Hours**.
- Step 2: Click **New Business Hours**.

The screenshot shows the Salesforce Setup interface for Business Hours. The left sidebar has a search bar with "Business Hours" and a list of settings including "Company Settings" and "Business Hours". The main content area is titled "Business Hours" and contains the "Organization Business Hours" table.

Organization Business Hours:

Action	Business Hours Name	Active	Time Zone	Default
Edit	Default	✓	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	✓

Below the table, there is a "New Business Hours" button and a search bar for finding other business hours.

- Step 3: Fill in the details:
 - Name: MediSwift Business Hours
 - Default: ✓ (Check to make these default hours)
 - Time Zone: (GMT+05:30) India Standard Time
 - Business Days & Hours:
 - Monday – Saturday: 09:00 AM to 09:00 PM
 - Sunday: Close
- Step 4: Click Save.

Business Hours Edit

Step 1. Business Hours Name
 Business Hours Name: Use these business hours as the default: ☒

Step 2. Time Zone
 Time Zone:

Step 3. Business Hours

Day	From	To	24 hours
Sunday			<input type="checkbox"/>
Monday	09:00 AM	09:00 PM	<input type="checkbox"/>
Tuesday	09:00 AM	09:00 PM	<input type="checkbox"/>
Wednesday	09:00 AM	09:00 PM	<input type="checkbox"/>
Thursday	09:00 AM	09:00 PM	<input type="checkbox"/>
Friday	09:00 AM	09:00 PM	<input type="checkbox"/>
Saturday	09:00 AM	09:00 PM	<input type="checkbox"/>

Holiday Setup:

- Step 1: Go to Setup → search for Holidays.
- Step 2: Click New Holiday

Holidays

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.

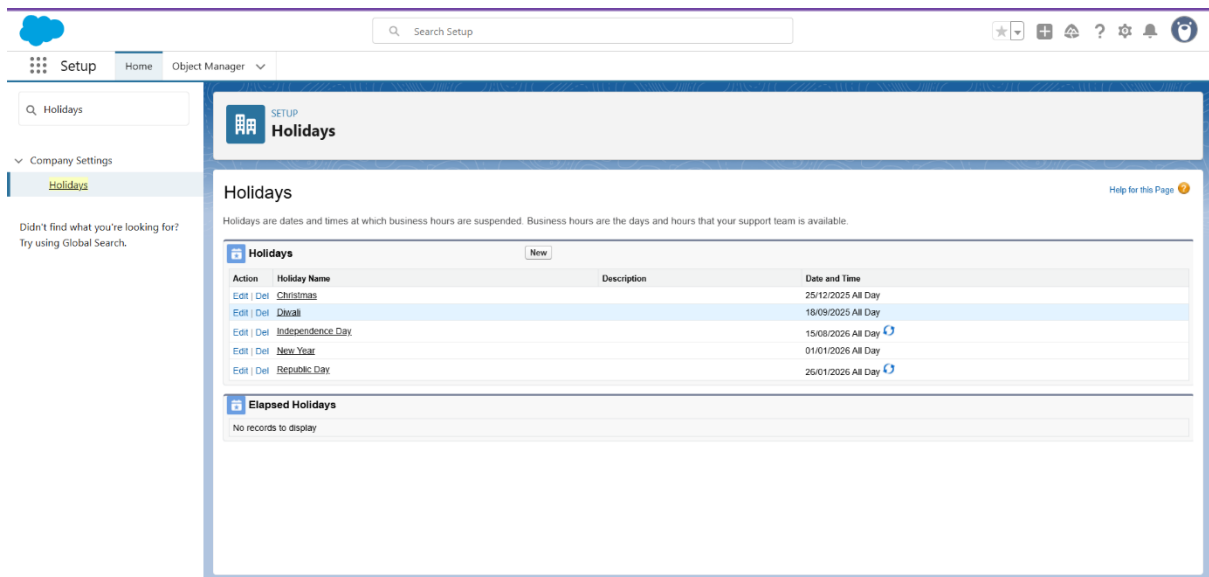
Holidays [New](#)

No records to display

Elapsed Holidays

No records to display

- Step 3: Enter details:
 - Holiday Name: Diwali
 - Date: 18/10/25
- Step 4: Repeat for all company holidays.
- Step 5: Click Save.



➤ Fiscal Year Setting:

Objective: To configure MediSwift's fiscal year in Salesforce for accurate forecasting, reporting, and quota management.

Steps:

- Step 1: Go to Setup → search for Fiscal Year.
- Step 2: Select Standard Fiscal Year (recommended for most organizations).
(If a unique cycle is needed, select Custom Fiscal Year — but this is not required for MediSwift.)
- Step 3: Configure Fiscal Year Period
 - Name: MediSwift
 - Fiscal Year Start Month: January
 - Fiscal Year is Based On: The Ending Month

- Step 4: Click Save to apply fiscal year settings.

Setup
Organization Fiscal Year Edit: MediSwift

To specify the fiscal year type for your organization, choose one of the options below.

Fiscal Year Information
Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

⚠ Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

☒ Standard Fiscal Year **1**
☐ Custom Fiscal Year **1**

Change Fiscal Year Period Save Cancel

Name: MediSwift
Fiscal Year Start Month: January
Fiscal Year is Based On: ☒ The ending month ☐ The starting month

Save Cancel

➤ User Setup & Licenses

Objective: To create dedicated Salesforce users for key MediSwift stakeholders to enable secure access and role-based functionality.

- Step 1: Go to **Setup** → search for **Users**.
- Step 2: Click **New User**.

Setup
Users

All Users

On this page you can create, view, and manage users.
To get more licenses, use the Your Account app. Let's Go

View: **All Users** Edit | Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **1**

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter.00000000000000000000@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Dolores Aquino	ADola	aquinovaldas@mediswift.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00000000000000000000@mediswift.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00000000000000000000@mediswift.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **1**

- Step 3: Create Users.
 - Fill in First Name, Last Name, Email, Username, Alias, Nickname.
 - Assign Salesforce Platform License
 - Select appropriate Profile
 - Set Active checkbox.

The screenshot shows the 'New User' form in the Salesforce Setup interface. The left sidebar contains navigation links for Setup, Home, Object Manager, and a search bar. The main content area is titled 'New User' and includes a 'User Edit' section with buttons for 'Save', 'Save & New', and 'Cancel'. The form is divided into 'General Information' and 'Role' sections. The 'General Information' section includes fields for First Name, Last Name (Pharmacy Owner), Alias (pharmacy), Email (pharmacy@mediswift.com), Username (pharmacy@mediswift.com), Nickname (User175817319284326651), Title, Company, Department, and Division. The 'Role' section includes a dropdown for Role (None Specified), a dropdown for User License (Salesforce Platform), a dropdown for Profile (Standard Platform User), and checkboxes for Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Data.com User Type (None). There are also fields for Data.com Monthly Addition Limit (Default Limit (300)) and Accessibility Mode (Classic Only).

- Step 4: Save. Repeat the process for each stakeholder type.

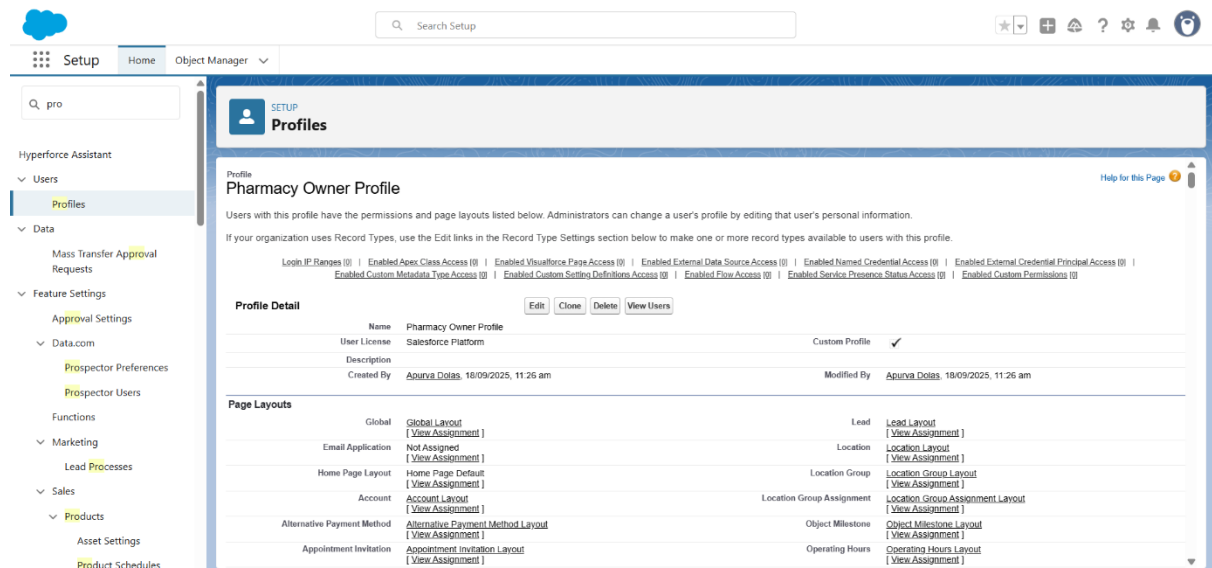
The screenshot shows the 'All Users' page in the Salesforce Setup interface. The left sidebar contains navigation links for Setup, Home, Object Manager, and a search bar. The main content area is titled 'All Users' and includes a 'View' dropdown (All Users) and a 'Create New View' button. Below the header, there is a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table contains 8 rows of user data.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter_00s4200000c0vd08eaf@06df62zyy@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Customer	customer	customer@mediswift.com		✓	Standard Platform User
<input type="checkbox"/> Edit	Delivery Partner	delivery	delivery@mediswift.com		✓	Standard Platform User
<input type="checkbox"/> Edit	Dotes Apurva	Adola	apurvadoles@mediswift.com		✓	System Administrator
<input type="checkbox"/> Edit	Pharmacy Owner	pharmacy	pharmacy@mediswift.com		✓	Standard Platform User
<input type="checkbox"/> Edit	User Integration	integ	integration@00s4200000c0vd08eaf.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00s4200000c0vd08eaf.com		✓	Analytics Cloud Security User

➤ Profiles

To control data access and permissions for different user types, three custom profiles were created by cloning the Standard Platform User profile. Each profile is tailored to match the responsibilities of the respective user group.

Profile Name	Purpose
Pharmacy Owner Profile	For pharmacy owners and staff who manage inventory and fulfil customer orders.
Delivery Partner Profile	For delivery partners who pick up and deliver medicines.
Customer Profile	For end users (patients) placing medicine orders through the platform.



The screenshot shows the Salesforce Setup interface for the 'Pharmacy Owner Profile'. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the profile details and page layouts.

Profile: Pharmacy Owner Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

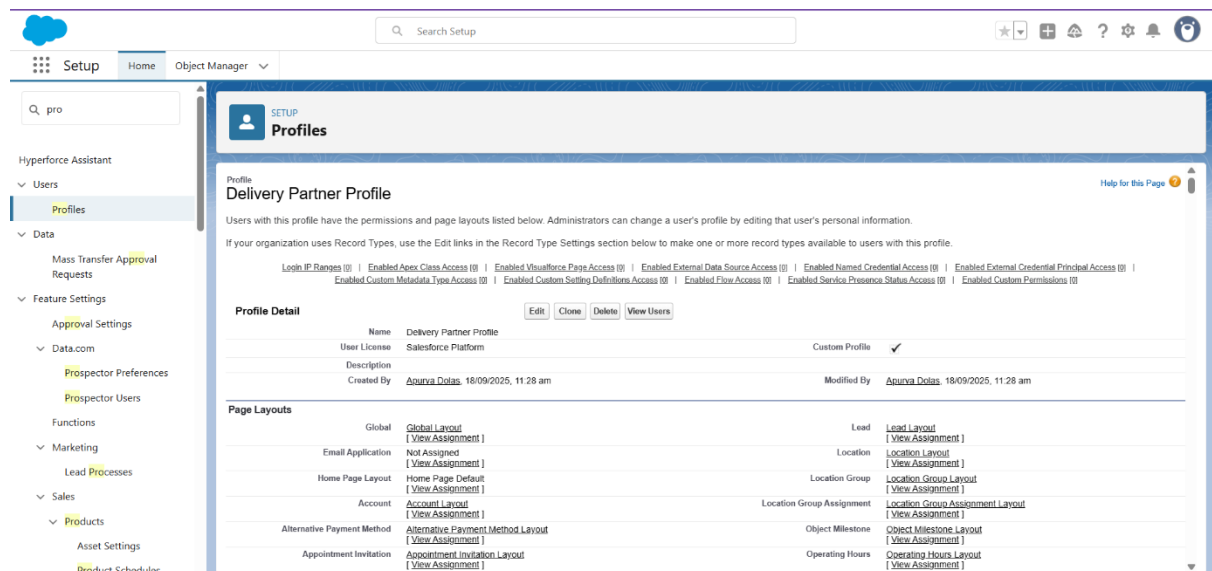
If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail

Name	Pharmacy Owner Profile	Custom Profile	✓
User License	Salesforce Platform		
Description			
Created By	Ajuna Dolas, 18/09/2025, 11:26 am	Modified By	Ajuna Dolas, 18/09/2025, 11:26 am

Page Layouts

Global	Global Layout [View Assignment]	Lead	Lead Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Location	Location Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Location Group	Location Group Layout [View Assignment]
Account	Account Layout [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]



The screenshot shows the Salesforce Setup interface for the 'Delivery Partner Profile'. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the profile details and page layouts.

Profile: Delivery Partner Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail

Name	Delivery Partner Profile	Custom Profile	✓
User License	Salesforce Platform		
Description			
Created By	Ajuna Dolas, 18/09/2025, 11:28 am	Modified By	Ajuna Dolas, 18/09/2025, 11:28 am

Page Layouts

Global	Global Layout [View Assignment]	Lead	Lead Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Location	Location Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Location Group	Location Group Layout [View Assignment]
Account	Account Layout [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]

Setup Home Object Manager

Search Setup

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Approval Settings

Data.com

Prospect Preferences

Prospect Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

Product Schedules

SETUP Profiles

Profile: **Customer Profile**

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Settings Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

Profile Detail Edit Clone Delete View Users

Name	Customer Profile	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce Platform		
Description			
Created By	Aruna Dolas	Modified By	Aruna Dolas
	18/09/2025, 11:28 am		18/09/2025, 11:28 am

Page Layouts

Global	Global Layout (View Assignment)	Lead	Lead Layout (View Assignment)
Email Application	Not Assigned (View Assignment)	Location	Location Layout (View Assignment)
Home Page Layout	Home Page Default (View Assignment)	Location Group	Location Group Layout (View Assignment)
Account	Account Layout (View Assignment)	Location Group Assignment	Location Group Assignment Layout (View Assignment)
Alternative Payment Method	Alternative Payment Method Layout (View Assignment)	Object Milestone	Object Milestone Layout (View Assignment)
Appointment Invitation	Appointment Invitation Layout (View Assignment)	Operating Hours	Operating Hours Layout (View Assignment)

➤ Roles

Objectives: To define a role hierarchy in Salesforce that controls data visibility between users while supporting MediSwift's business model.

Role Hierarchy Example:

MediSwift Admin

