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:

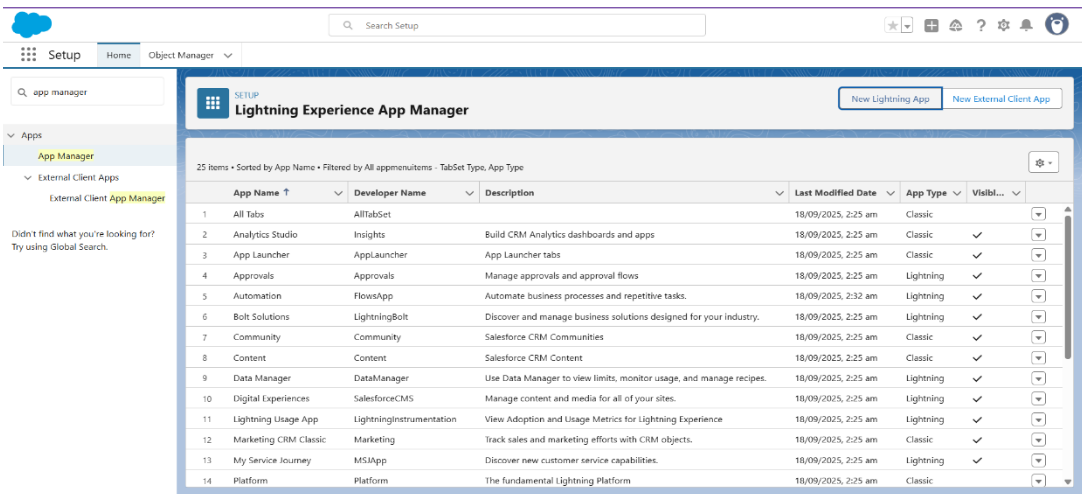
- Access to Salesforce CRM Core features (Leads, Accounts, Contacts, Opportunities, etc.).
- Customization tools like Objects, Fields, Flows, Validation Rules, and Reports.
- Apex and Lightning Components development capability.
- API access for integrations.

➢ Lightning App Creation – MediSwift

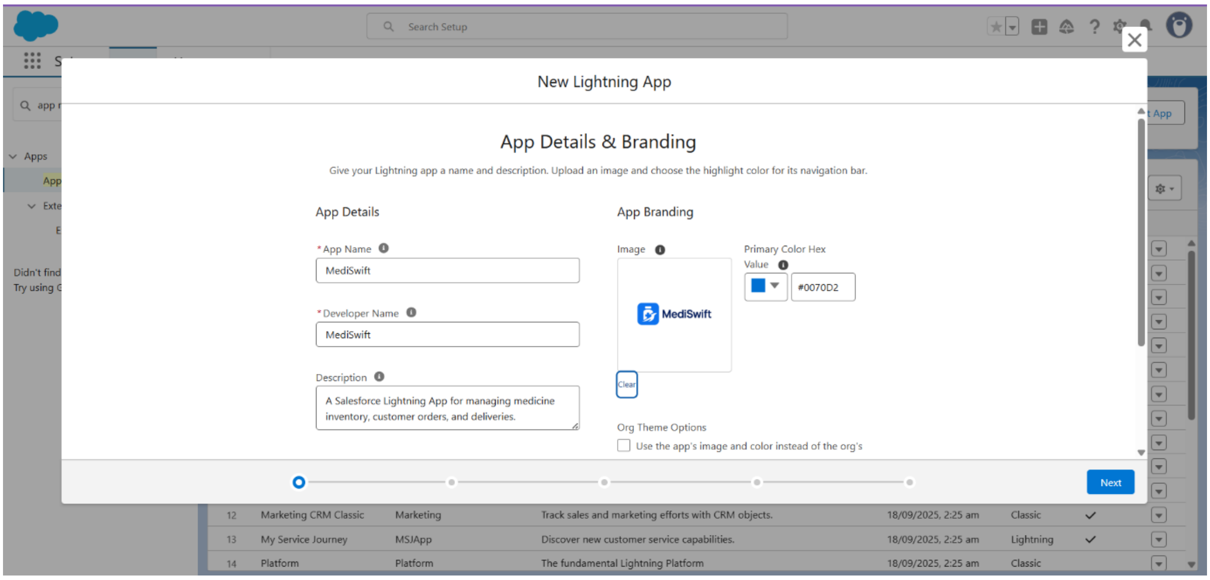
Objective: To create a dedicated **Lightning App** named *MediSwift* for managing medicines, pharmacies, orders, and deliveries efficiently within Salesforce.

Steps to Create the Lightning App:

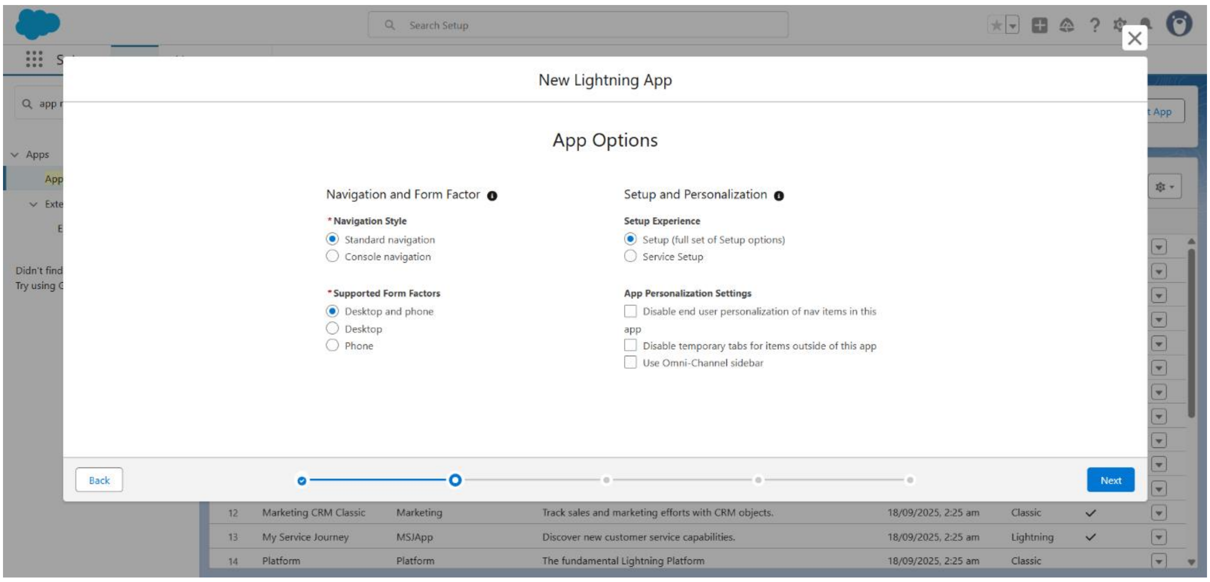
- Step 1: From Setup, search and open App Manager.
- Step 2: Click New Lightning App button.



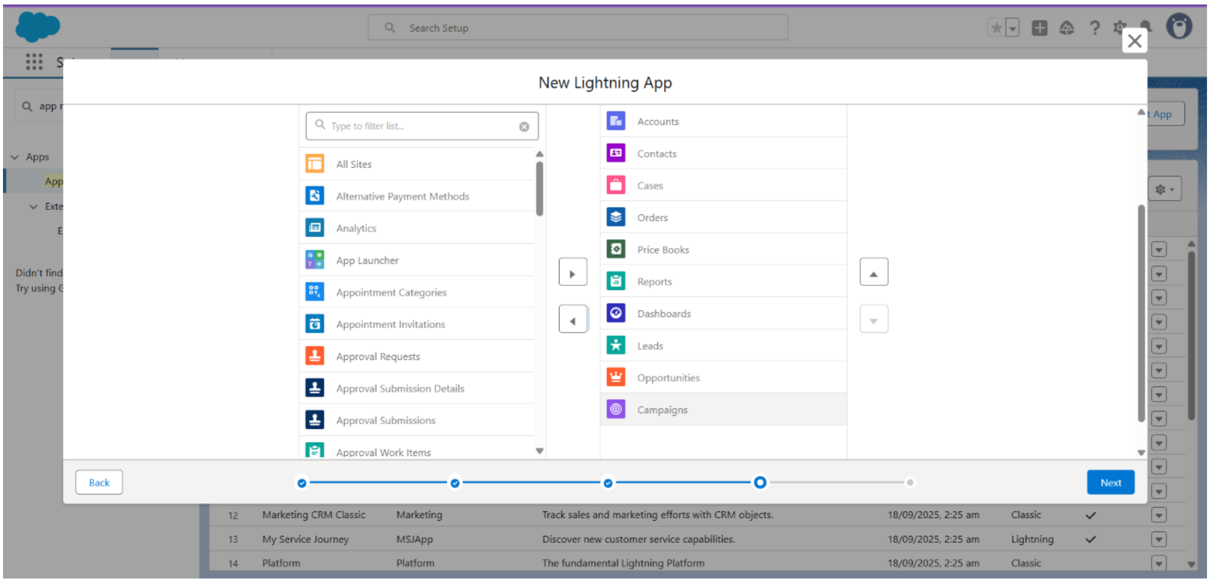
- Step 3: Enter app details.



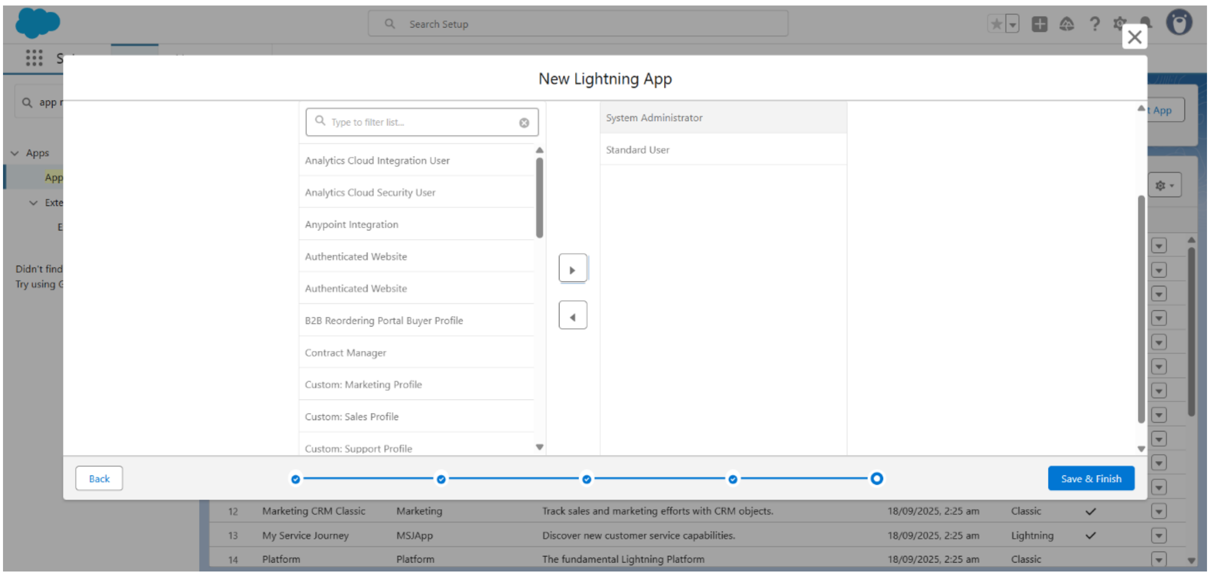
- Step 4: Select Standard Navigation for CRM-like experience.



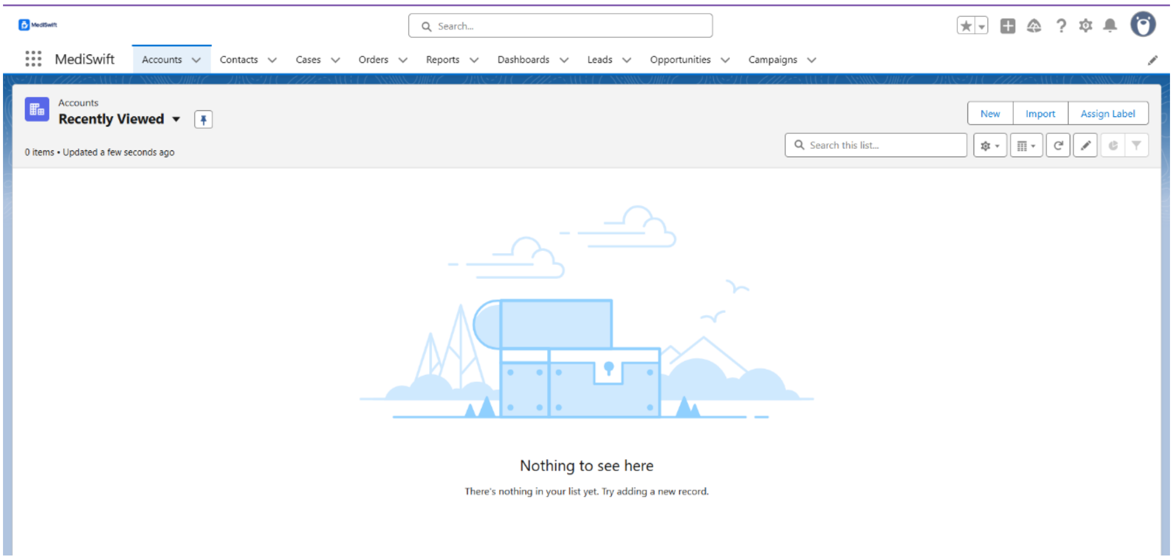
- Step 5: Add standard objects like Accounts, Contacts, Products, Orders, Reports, Dashboards.



- 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:

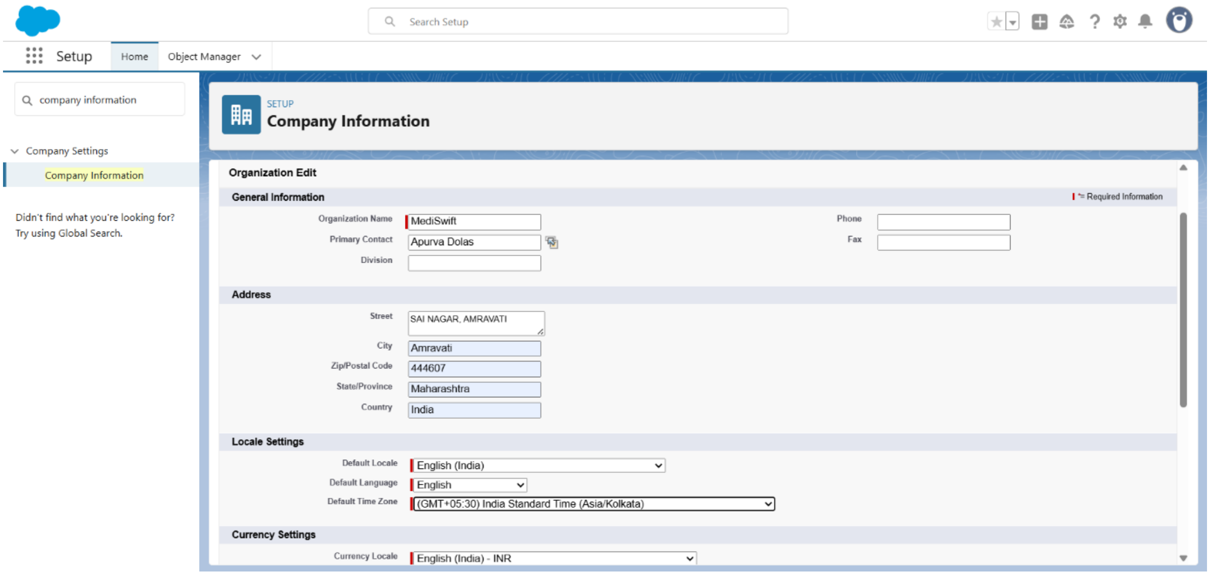
- Step 1: Go to Setup → Search for Company Information.

- 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.

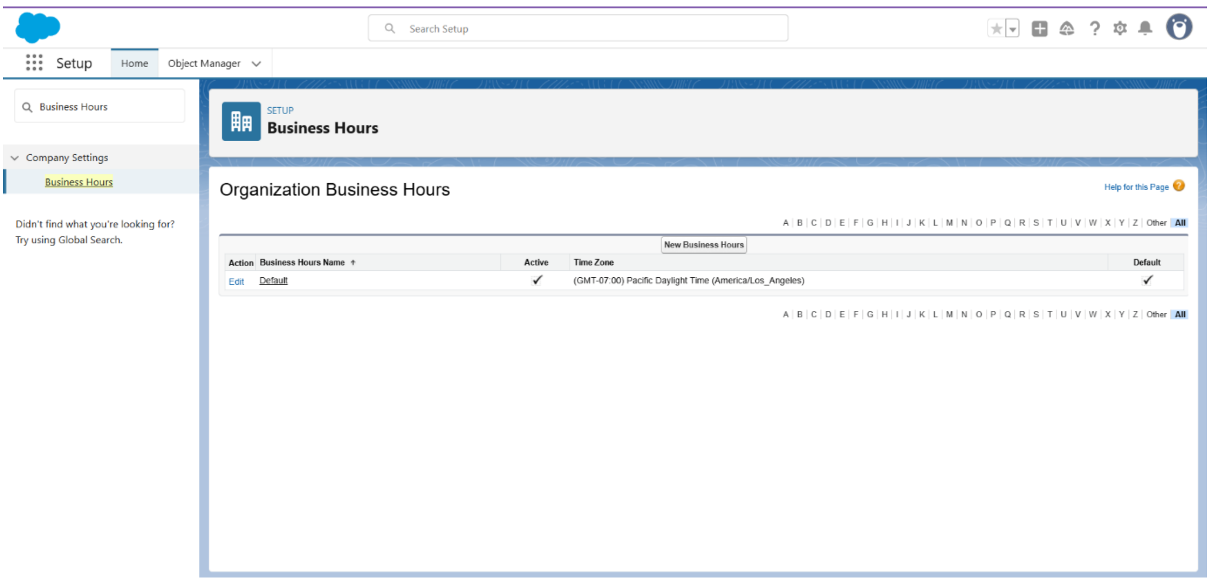


➢ Business Hours and Holidays

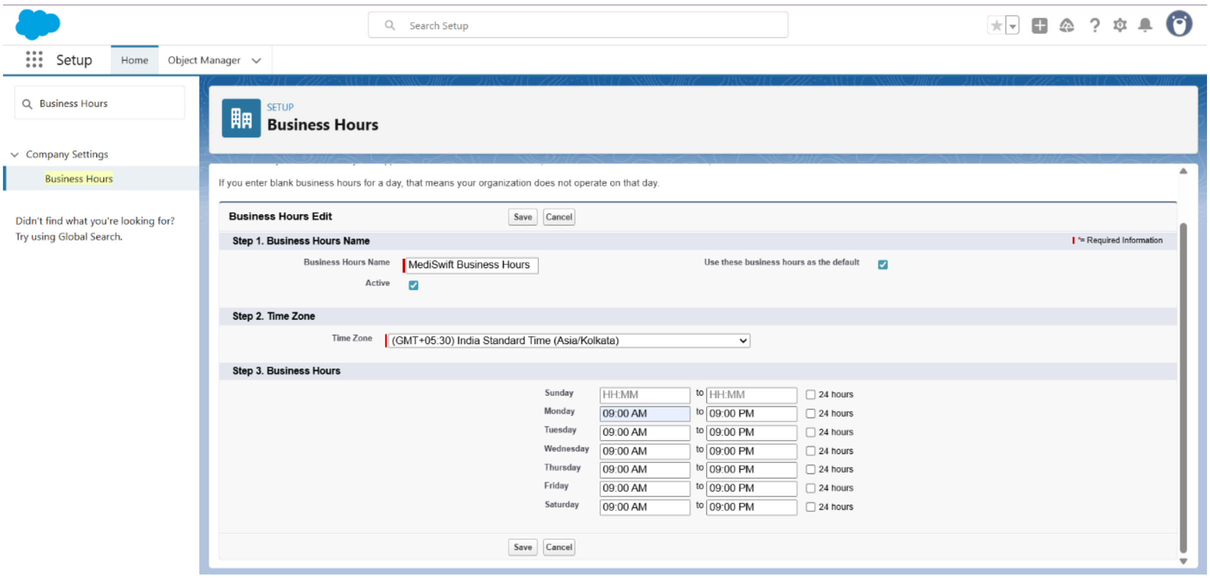
Objective: To configure MediSwift's standard business hours and holidays in Salesforce.

Business Hours Setup:

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

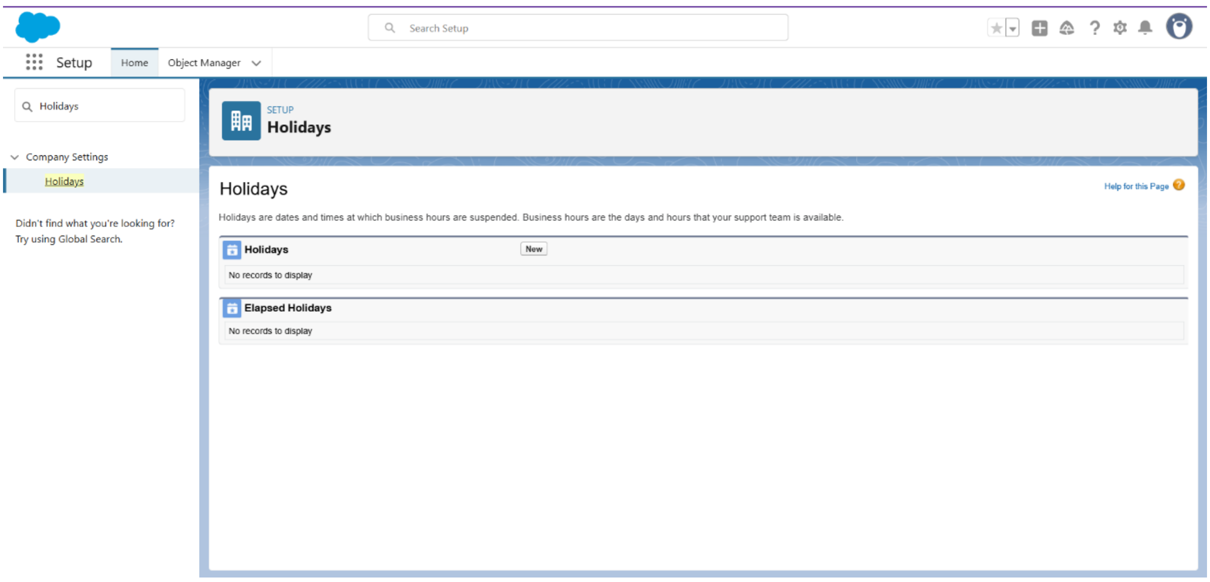


- Step 3: Fill in the details:
  - Name: MediSwift Business Hours
  - Default: ✓ (Check to make these default hours)
  - Time Zone: (GMT+05:30) India Standard Time
  - Business Days & Hours:
    - Monday – Saturday: 09:00 AM to 09:00 PM
    - Sunday: Close
- Step 4: Click Save.



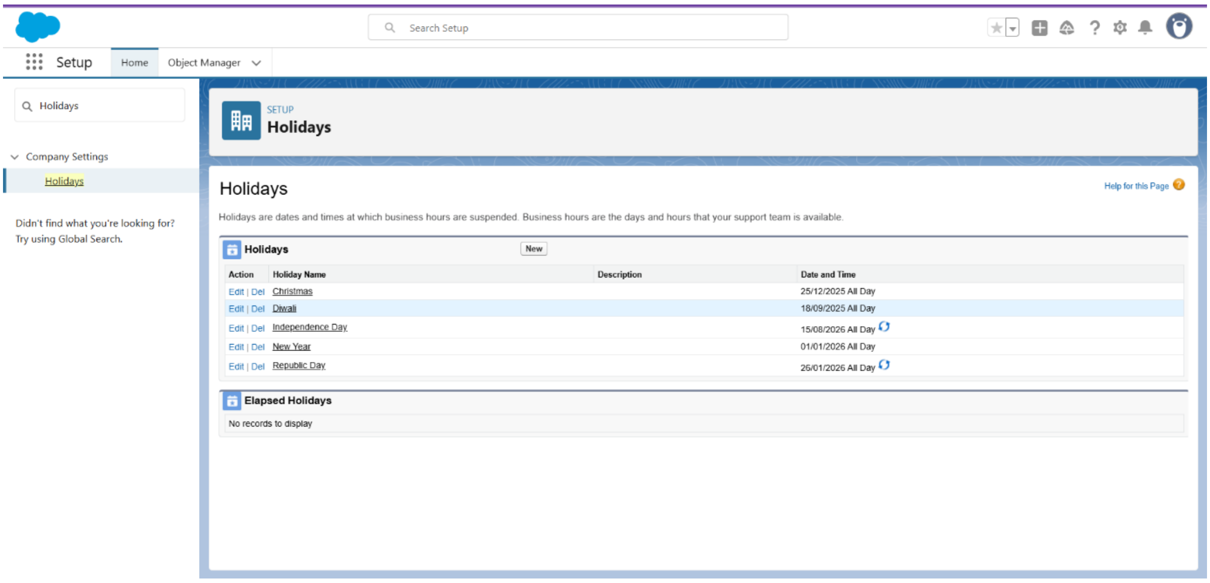
Holiday Setup:

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



- 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.

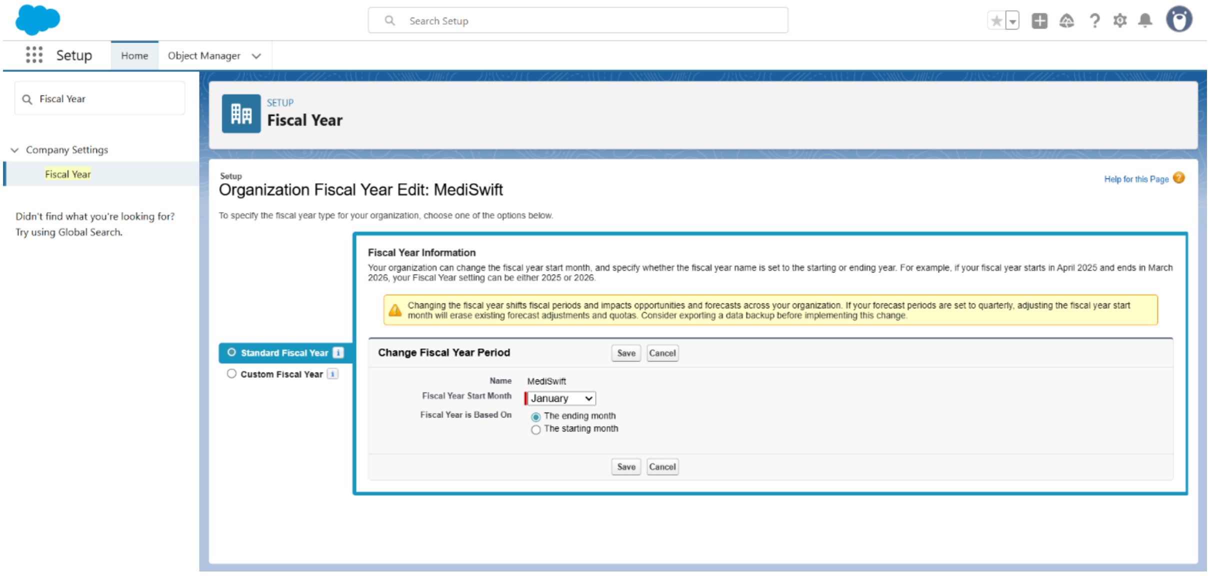
Steps:

- 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

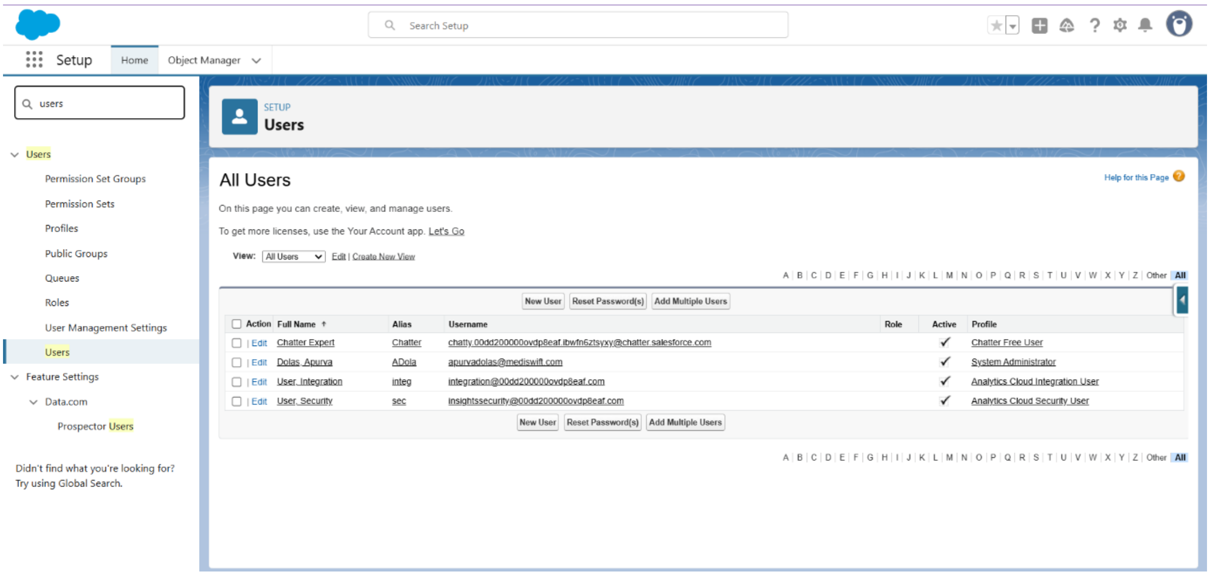
- Step 4: Click Save to apply fiscal year settings.



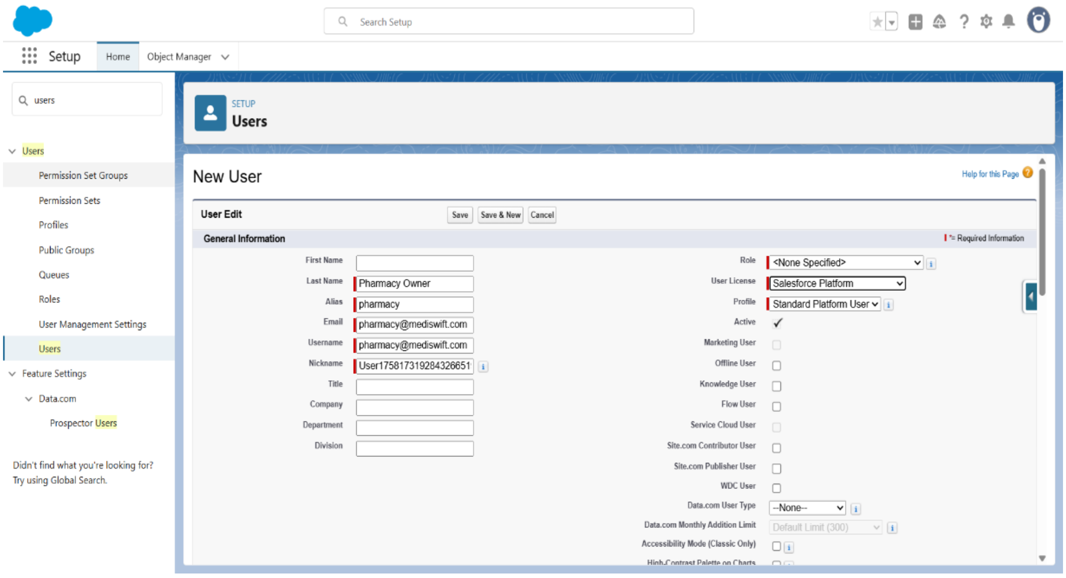
➢ User Setup & Licenses

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

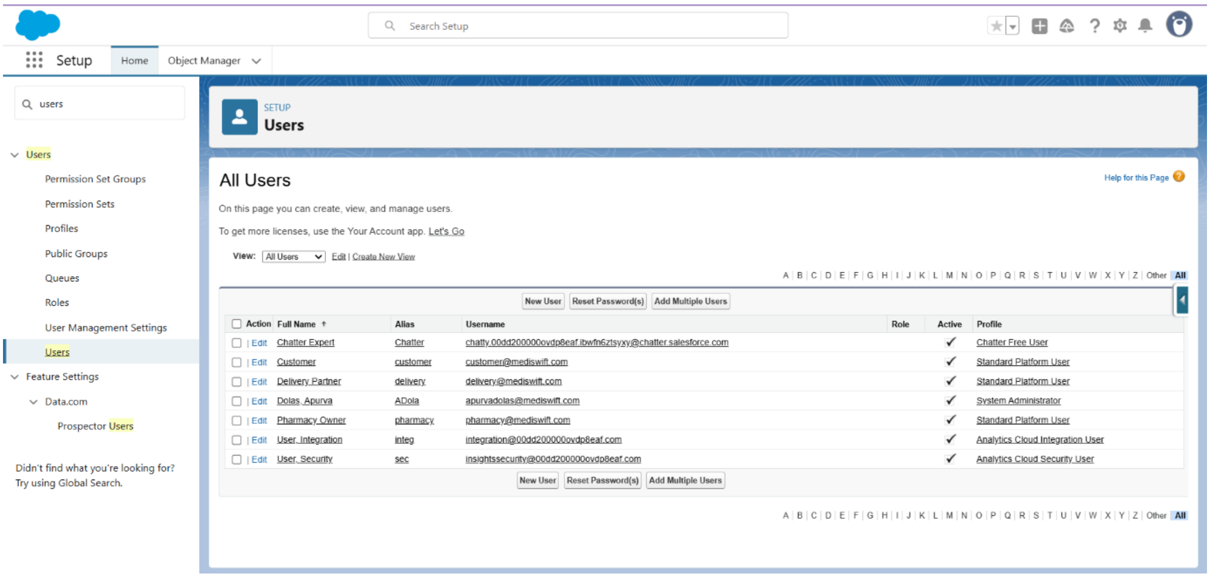
- Step 1: Go to **Setup** → search for **Users**.
- Step 2: Click **New User**.



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



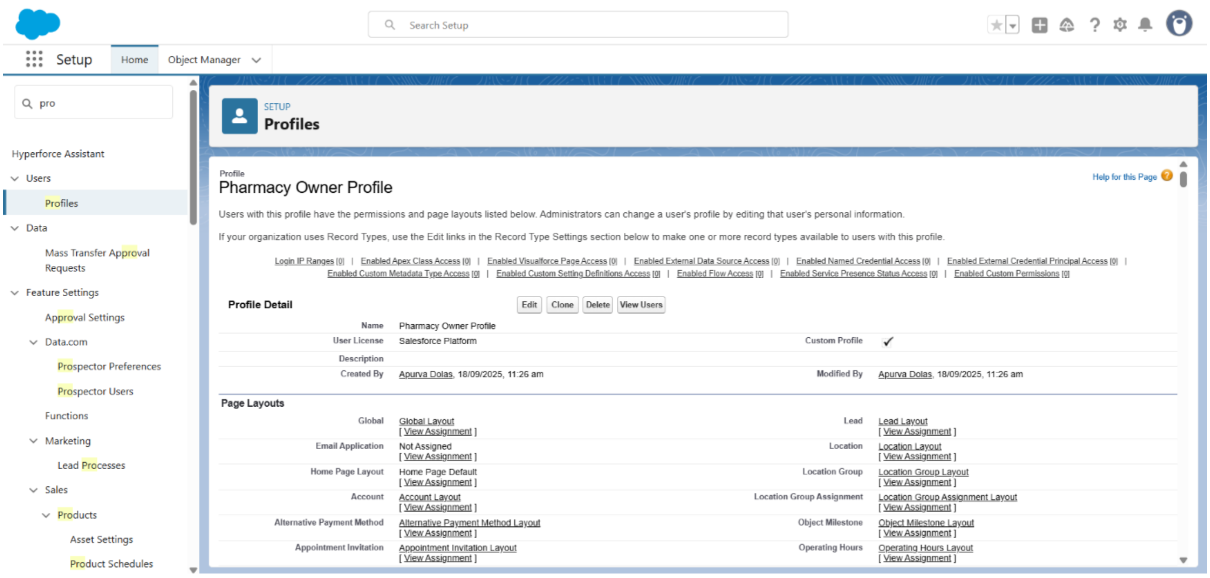
- Step 4: Save. Repeat the process for each stakeholder type.

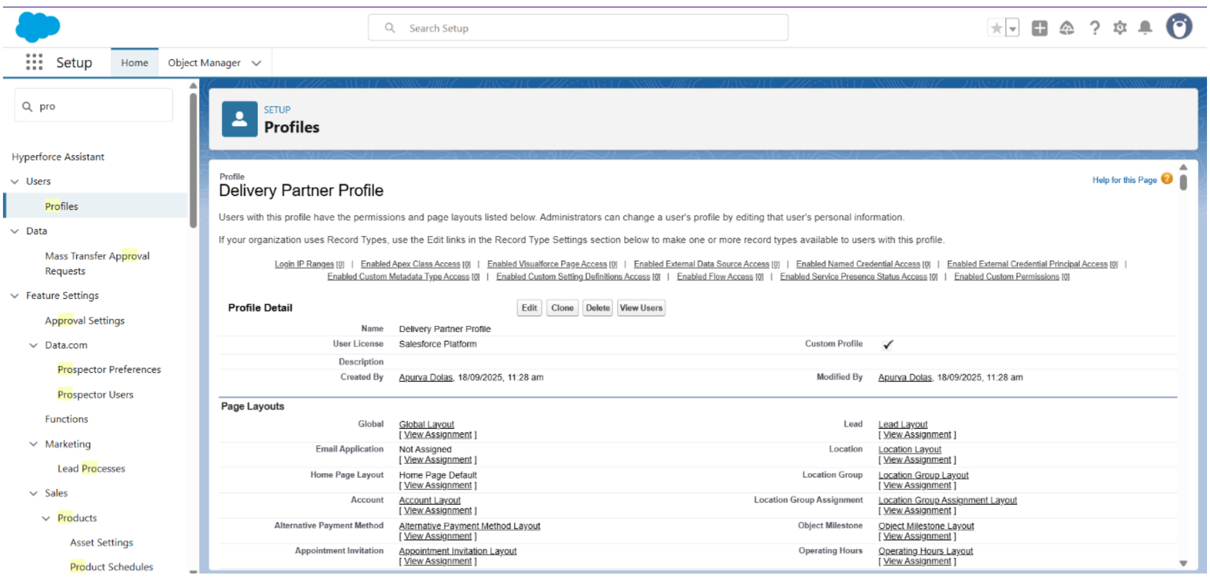


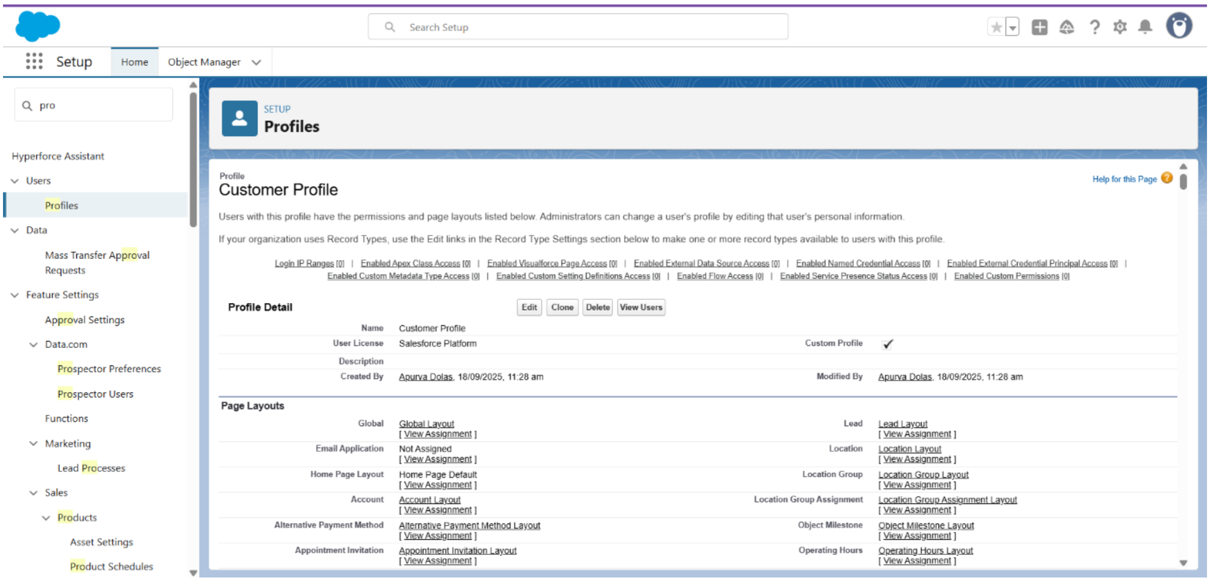
➢ Profiles

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.







➢ 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

├── Pharmacy Owner Role

│   └── Delivery Partner Role

└── Customer Role