

# Customer Journey Map

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Team ID	LTVIP2025TMID30494
Project Name	Medical Inventory Management

## Benefits for Requirement Analysis:

- **Role Clarity:** Outlines the responsibilities of Inventory Managers, Purchase Managers, and System Automations at each process stage.
- **Integration Mapping:** Highlights potential touchpoints with barcode scanners, ERP systems, and supplier platforms.
- **Automation Triggers:** Maps where Salesforce Flows, Approval Processes, and Expiry Alerts should execute.
- **Pain Points Identified:** Manual reordering, mismatched deliveries, expired product usage, and lack of visibility in stock levels.
- **Traceable Requirements:** Each stage directly informs custom object creation (Purchase\_Order\_\_c, Inventory\_Transaction\_\_c), automation logic, and UI components.

## The Process

1. Stock Level Monitoring
  - **Inventory Manager:** Reviews current inventory levels and expiry dates.
  - **Salesforce:** Displays real-time dashboard, triggers low-stock alerts.
  - **External:** Barcode scanner logs stock usage.
2. Supplier Coordination & PO Creation
  - **Purchase Manager:** Selects supplier based on performance history.
  - **Salesforce:** Generates purchase order, calculates totals.
  - **External:** Supplier system integration for automated order submission.
3. Approval & Order Dispatch
  - **Salesforce:** Sends PO for internal approval (Flow), tracks status.
  - **Purchase Manager:** Confirms approval and dispatch window.

#### 4. Stock Arrival & Update

- **Inventory Manager:** Verifies delivery, inspects expiry dates.
- **Salesforce:** Triggers Actual Delivery Date update, calculates stock received.
- **External:** Barcode data capture and ERP update.

#### 5. Usage & Expiry Monitoring

- **Inventory Manager:** Monitors inventory usage daily.
- **Salesforce:** Logs transactions, issues expiry alerts.
- **External:** Optional alerts sent to mobile devices.

#### 6. Reporting & Insights

- **Purchase Manager:** Reviews supplier performance, cost analysis.
- **Salesforce:** Pulls summary and detailed purchase reports.
- **Dashboard:** Visualizes purchase trends and stock anomalies.

#### 7. Audit & Optimization

- **Admin:** Audits inventory trends and process gaps.
- **Salesforce:** Retains historical data for inspection and compliance.
- **External:** Syncs with master procurement system for monthly audits.

