

# **Problem – Solution Fit**

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<b>Team ID</b>	LTVIP2025TMID30494
<b>Project Name</b>	Medical Inventory Management

## **Problem Statement:**

Healthcare organizations face challenges managing medical inventory due to:

- Fragmented supplier and inventory data across spreadsheets and manual logs
- Delayed tracking of product expiries and purchase order deliveries
- Manual workflows causing errors and inefficiencies in stock replenishment
- Lack of visibility into supplier performance and procurement trends
- Missed reorder points leading to stockouts or surplus, impacting patient care

## **Target Users / Stakeholders:**

- Inventory Managers
- Purchase Managers
- Warehouse/Pharmacy Staff
- Hospital Admin Teams
- System Admins

## **User Needs:**

- Centralized system for managing suppliers, products, and inventory
- Automated alerts for low stock levels and product expiries
- Quick creation and approval of purchase orders
- Real-time visibility into inventory and procurement metrics
- Simple UI for non-technical users to manage workflows
- Secure, role-based access to sensitive procurement and stock data

### **Proposed Solution in Salesforce:**

1. Custom Objects for Products, Suppliers, Purchase Orders, Order Items, and Inventory Transactions
2. Apex Triggers and Flows for automatic stock updates, expiry alerts, and amount calculations
3. Validation Rules to ensure clean and complete data input (e.g., expected delivery constraints)
4. Dashboards and Reports for stock monitoring, supplier performance, and financial summaries
5. Role-based Permissions for Inventory Managers and Purchase Managers
6. Scheduled Flows to automate expiry checks and delivery updates

### **Current State vs. Future State**

Feature	Current (Manual/Legacy)	Future (Salesforce-Based)
Inventory Tracking	Spreadsheet-driven, often inaccurate	Centralized, real-time visibility on Salesforce
Expiry Monitoring	Reactive and error-prone	Proactive, automated alerts via Flows
PO Processing	Manual creation, approval delays	Digitized PO lifecycle with approval and automation flows
Supplier Insights	No consolidated performance history	Report-driven supplier analysis
Security & Compliance	Generic access, risk of misuse	Role-based access with audit trails

### **Tools/Technologies to Be Used**

- **Salesforce** – Core platform for workflow automation, data visibility, and role control
- **Flow Builder & Apex** – For backend logic and automation
- **Salesforce Reports & Dashboards** – For analytics and insights
- **Permission Sets & Profiles** – To manage user access
- **Excel/CSV Import Tools** – For bulk data loading

## **Outcome**

<b>Indicator</b>	<b>Before (Problem)</b>	<b>After (Solution)</b>
Inventory visibility	Fragmented and unreliable	Real-time, accurate, and centralized
Expiry tracking	Manual and easily missed	Automated alerts and flows
PO process efficiency	Slow and spreadsheet-bound	Streamlined with automated PO creation and approvals
Supplier performance data	Scattered or missing	Consolidated reports and dashboards
Role clarity and access	Unstructured, risk-prone	Controlled, audit-ready roles and permissions