

# Project Planning

<b>Date</b>	28 June 2025
<b>Team ID</b>	LTVIP2025TMID30494
<b>Project Name</b>	Medical Inventory Management

## 1. Project Objectives

- Automate the full medicine inventory lifecycle—from supplier onboarding to product expiry tracking.
- Streamline purchase order processing with alerts, validations, and delivery tracking.
- Empower hospital staff with dashboards, inventory forecasts, and transaction-level reporting via Salesforce.
- Ensure compliance with hospital safety standards and streamline approval flows.

## 2. Scope of Work

<b>Component</b>	<b>Details</b>
<b>Core Modules</b>	Product & Supplier Management, PO Lifecycle, Inventory Transactions, Expiry Alerts, Dashboards
<b>Automations</b>	Salesforce Flows, Apex Triggers, Validation Rules, Scheduled Jobs
<b>Compliance</b>	Delivery tracking, expiry rules, low-stock alerts, audit logging

## 3. Project Goals

- Replace spreadsheet-based inventory tracking with centralized Salesforce records
- Prevent use of expired stock via scheduled expiry alerts
- Improve procurement lead times and transparency
- Reduce manual errors in PO calculations and deliveries
- Enable future expansion to support barcoding and multibranch access

#### **4. Scope Definition**

In-Scope Items	Out-of-Scope Items
Supplier and Product record creation and updates	Integration with external logistics providers
Purchase Order creation, approval, and tracking	AI-based predictive inventory forecasting (future scope)
Real-time dashboard and stock level monitoring	In-depth financial integration with ERP
Expiry notifications and auto-reminders	Regulatory compliance document generation (handled separately)

#### **5. Agile Sprint Planning (Sample Backlog)**

Sprint	Epic	User Story	Task Summary	Story Points	Priority
Sprint 1	Product Setup	As a user, I want to add products with expiry	Create Product object, add expiry fields	3	High
Sprint 2	Purchase Process	Create purchase order and calculate totals	PO object setup, trigger logic	3	High
Sprint 3	Expiry Monitoring	Get alerts before medicines expire	Scheduled Flow, Notification component	2	Medium
Sprint 4	Supplier Analytics	View reports on supplier performance	Reports + Dashboard creation	2	Medium

#### **6. Risks & Mitigation Strategies**

Identified Risk	Mitigation Plan
Delay in delivery data capture	Use Flows to automate Actual Delivery updates
Low user adoption of dashboard features	Conduct training; use real scenarios to demonstrate value
Incorrect expiry data entry	Add validation rules and required fields
Data inconsistency during bulk upload	Validate imports using templates and backups

## **7. Planning Phase Deliverables**

- Functional Requirement Document (FRD)
- Technical Design Document (TDD)
- Sprint Backlog & User Stories
- Risk Management Sheet
- Resource Allocation & Timeline Chart
- Flowcharts and Automation Map
- Go-Live Support & Training Plan