

Brainstorm & Idea

Team ID: 6D24F58C3BFCDC0B2754A4CE3927F280

Project Name: Medical Inventory Management System (Salesforce)

Maximum Marks: 4 Marks

Medical Inventory Management System Template:

This guided project focuses on developing a **Salesforce-based Medical Inventory Management System** that centralizes supplier information, product tracking, purchase order handling, and expiry management. The aim is to improve operational accuracy, reduce expired-stock losses, and enable data-driven procurement.

The workflow begins by defining the core operational entities — suppliers, products, purchase orders, and transactions — followed by designing Salesforce business rules and automation to maintain accurate and compliant data.

The system includes features such as:

- Prevention of expired product usage.
- Real-time supplier and stock visibility.
- Automated alerts for low stock or nearing expiry.
- Streamlined purchase order lifecycle.

A testing scenario validates the end-to-end functionality: creating a supplier, adding a purchase order, updating stock upon receiving goods, and verifying expiry-based alerts. This ensures business continuity, data integrity, and improved procurement oversight.

Step 1: Team Gathering, Collaboration and Problem Selection

Reference: [Mural Brainstorm & Idea Prioritization Template](#)

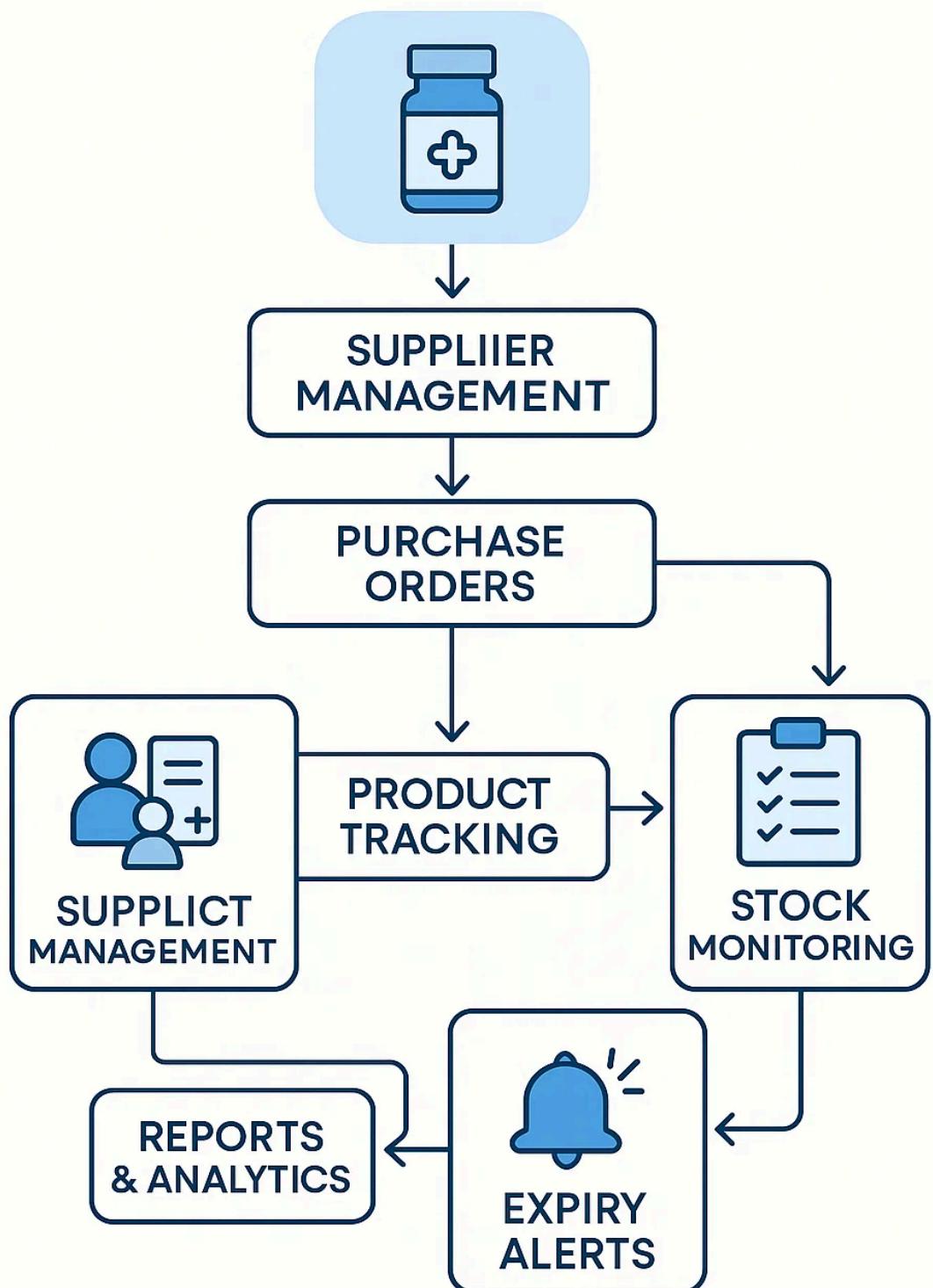
Problem Chosen:

Hospitals and medical centers struggle to manage their inventory efficiently, leading to product expiry, stockouts, and inaccurate supplier tracking. The goal is to create a Salesforce application that streamlines these processes and maintains product safety and compliance.

Team Collaboration:

- Conducted brainstorming sessions with procurement officers, pharmacists, and Salesforce developers.
- Discussed challenges around manual tracking, outdated Excel logs, and missed expiry alerts.
- Prioritized building automation and reporting first to improve real-time visibility.
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MEDICAL INVENTORY MANAGEMENT SYSTEM (SALESFORCE)



Step 2: Brainstorm, Idea Listing, and Grouping

Brainstorming Session Outcome:

Team members freely shared improvement ideas focusing on automation, data accuracy, and supplier collaboration.

Idea Listing:

1. Automated expiry alerts for all medical products.
2. Supplier master management with performance tracking.
3. Purchase order lifecycle automation (create–approve–receive–invoice).
4. Stock level alerts and reorder thresholds.
5. Product batch tracking and audit history.
6. Integration with finance for billing and reconciliation.
7. Dashboards for management and analytics.
8. Role-based permissions for storekeepers, pharmacists, and admins.
9. Approval workflows for high-value orders.
10. Expired product quarantine and notification.

Grouping:

- **Automation & Alerts:** (1, 4, 10)
- **Supplier & Procurement:** (2, 3, 9)
- **Inventory Management:** (5, 8)
- **Reporting & Analytics:** (6, 7)

Action Planning:

From the grouped ideas, the team agreed to begin with automation and inventory modules since they directly impact patient safety and compliance. Responsibilities were assigned to the Salesforce dev team for configuration and to QA for validation.

Step 3: Idea Prioritization

Idea Prioritization Objective:

To identify the most impactful and feasible features that deliver measurable operational improvements in the shortest timeframe.

Prioritized Ideas:

| Priority | Idea | Reason for Selection |
|----------|---------------------------|---|
| 1 | Automated Expiry Alerts | Prevents product misuse, directly impacts patient safety. |
| 2 | Purchase Order Management | Improves procurement efficiency and audit trail. |
| 3 | Supplier Database | Enhances vendor accountability and quality tracking. |
| 4 | Stock Reorder Alerts | Prevents shortages in essential medical supplies. |
| 5 | Dashboard & Reports | Enables decision-makers to track performance metrics. |

Outcome:

The team polarized ideas into clear components: **Procurement, Inventory, Automation, and Reporting**. This modular approach simplifies development sprints and aligns with Salesforce best practices. Each selected feature can be developed and validated independently, ensuring fast iteration and reduced risk.

Visualization Tools Used:

Flowcharts, data model diagrams, and Mural idea boards to visualize object relationships and feature dependencies.

Result:

Idea polarization clarified the project roadmap, allowed the team to focus on high-impact features first, and ensured scalability for future modules like finance integration and predictive inventory analysis.