Project Planning Phase
Project Planning Template

Date:	03.11.2025
Project Name:	Medical Inventory Management
Team Id:	E6B89203D9C618592C84F3385E57DB7C

Project Planning: Medical Inventory Management System

Introduction:

The **Medical Inventory Management System (MIMS)** is a Salesforce-based solution designed to automate and streamline the management of medical supplies within hospitals and pharmacies. The project focuses on efficient tracking of stock, suppliers, purchase orders, and expiry details—enhancing accuracy, transparency, and decision-making in healthcare operations.

Project Goals:

The main goals of the project are:

- To automate manual inventory processes.
- To maintain real-time visibility of stock levels and expiry dates.
- To minimize human error and stock wastage.
- To improve purchase order management and supplier performance tracking.
- To create a unified Salesforce platform for healthcare inventory management.

Project Scope:

The system will manage:

- Medicines, consumables, and surgical tools.
- Supplier records and purchase orders.
- Stock entries (in/out) and transaction history.
- Alerts for low stock and expired items.
- Analytical reports and dashboards for performance tracking.

Out of Scope:
Integration with third-party hospital systems and mobile application interfaces.

Project Phases & Timeline:

Phase	Description	Duration
Phase 1: Requirement Analysis	Identify functional and non-functional requirements through team discussions and stakeholder consultation.	Week 1
Phase 2: Design Phase	Create data models, object relationships, and Salesforce architecture	Week 2
Phase 3: Development Phase	Implement functionality using Flows, Validation Rules, Apex Triggers, and Page Layouts.	Week 3-4
Phase 4: Testing Phase	Conduct functional testing and data validation using sample transactions.	Week 5
Phase 5: Deployment Phase	Deploy to Salesforce environment and assign profiles, roles, and permissions.	Week 6
Phase 6: Review & Documentation	Generate final reports, dashboards, and prepare project documentation.	Week 7

Project Deliverables:

Deliverable	Outcome
Developer Account & Setup	Functional Salesforce environment.
Custom Objects & Relationships	Structured data model for medical inventory.
Validation Rules & Flows	Automated processes ensuring data integrity.
Apex Triggers	Custom automation for total cost calculations.

Reports & Dashboards	Visual analytics and supplier performance metrics.
User Profiles & Roles	Secure access management.
Final Documentation	Project summary and implementation guide.

Tools & Technologies:

Category	Tool/Technology
Platform	Salesforce (Cloud CRM)
Programming	Apex, SOQL
Automation	Flows, Validation Rules
Analytics	Reports, Dashboards
Interface	Lightning App
Collaboration	Salesforce Developer Console

Risk Assessment:

Risk	Impact	Mitigation Strategy
Misconfigured Validation Rules	High	Peer review before deployment.
Data Inconsistency	Medium	Implement lookup relationships and testing.
Access Issues	Medium	Proper profile and role hierarchy setup.
Report Inaccuracy	Low	Cross-check sample data before generation.

Team Roles & Responsibilities:

Role	Member	Responsibility
Project Lead	Kaleeswari B	Oversees development and testing.
Developer	Gunavarsha M	Implements Salesforce objects, flows, and triggers.
Tester	Maunika M S	Conducts functional and integration testing.
Documentation & UI	Nika J	Prepares reports, dashboards, and final documentation.

Success Criteria:

- 100% automation of inventory and purchase tracking.
- Zero expired medicine usage through alerts.
- Accurate supplier reports and order tracking.
- Functional and secure Salesforce application deployment.

Conclusion:

This project plan ensures a structured and phased approach to implementing the **Medical Inventory Management System** on Salesforce.It defines clear milestones, roles, and quality checks to guarantee that the final system is reliable, scalable, and ready for real-world healthcare inventory management.