

Phase 2 : Project Planning Phase

Project Title : Medical Inventory Management System

Introduction

The project planning phase defines how the Medical Inventory Management System will be developed and implemented. It includes setting clear objectives, identifying required resources, creating a timeline, and assigning tasks to team members. Proper planning ensures that the project is completed on time, within budget, and meets the needs of healthcare facilities for managing medical inventory efficiently.

Project Overview

The **Medical Inventory Management System** is designed to help healthcare facilities such as hospitals, clinics, and pharmacies manage their medical supplies more efficiently. The system automates the process of tracking, updating, and monitoring inventory levels in real-time. It helps prevent issues like stock shortages, overstocking, and expired items by providing automated alerts and easy access to inventory data.

Project Goals

- 1. Automate inventory tracking** using Salesforce to reduce manual work and errors.
 - 2. Monitor stock levels in real-time** and send alerts for low or expired items.
 - 3. Simplify procurement and restocking** through automated workflows and approvals.
 - 4. Generate reports and dashboards** in Salesforce for better decision-making.
 - 5. Ensure secure and centralized data management** for all medical supplies.
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Tools and Technologies Used

- 1. Salesforce Platform (CRM):**
Used as the main platform to build, customize, and deploy the Medical Inventory Management System.
- 2. Salesforce Objects (Standard & Custom):**
Custom objects are created to manage inventory items, suppliers, and purchase records.
- 3. Salesforce Flow / Process Builder:**
Used for automating workflows such as low-stock alerts and item expiry notifications.

4. **Salesforce Reports and Dashboards:**
Used to generate analytical reports for monitoring inventory performance and trends.
 5. **SmartInternz Portal:** To track progress and submit project deliverables.
 6. **GitHub:** For maintaining project documentation and video links.
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Team Structure and Roles

A clear division of roles helps in smooth progress and accountability. The roles for this project include:

1. **Project Lead:**
Oversees the entire project and ensures all phases are completed on time.
 2. **Salesforce Developer:**
Develops and configures objects, fields, workflows, and dashboards in Salesforce.
 3. **Document Specialist:**
Prepares all project phase documents and maintains proper formatting.
 4. **Tester:**
Tests the CRM functions such as record creation, update, and report generation.
 5. **Video Presenter:**
Records and explains the demo video of the completed project.
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Risk Management

Every project can face risks such as technical issues, data loss, or time delays.
To minimize these risks:

1. **Regularly back up project data** in Salesforce and GitHub.
 2. **Divide tasks clearly** to avoid confusion and overlap.
 3. **Maintain regular communication** within the team to ensure progress updates.
 4. **Test each feature after development** to confirm proper functionality and performance.
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Monitoring and Evaluation

Project progress will be monitored through:

1. **Regular review of milestones** in the SmartInternz platform.

2. **Tracking completion** of each phase document to ensure timely submission.
 3. **Evaluating CRM performance** by testing workflows, automation, and report generation.
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Project Timeline

The project is divided into specific tasks with expected completion periods:

Phase	Task Description	Duration
Phase	Ideation and topic selection	2 days
Phase	Planning and team setup	2 days
Phase	Design and development in Salesforce	4 days
Phase	Requirement analysis and document preparation	3 days
Phase	Testing and demo video creation	2 days
Final Submission	Upload to GitHub and SmartInternz	1 days

Conclusion

The Project Planning Phase provides a structured roadmap for the successful execution of the **Medical Inventory Management System**. With proper planning, clearly defined roles, and well-organized timelines, the project will be implemented efficiently. This ensures timely completion, effective automation of medical inventory tasks, and a high-quality system that improves accuracy, reduces manual effort, and enhances overall healthcare operations.