**Problem Statement**: The e-commerce company faces operational inefficiencies due to manual order entry and spreadsheet-based inventory tracking. This leads to errors, delayed updates, frequent stockouts, and poor visibility into sales performance. Customers often experience communication delays, resulting in frustration and higher support workload. Management lacks real-time insights to make informed decisions, directly impacting revenue and customer satisfaction.

1. **Requirement Gathering**

Key Requirements:

* Centralize order data in Salesforce, removing spreadsheet dependency
* Auto-update inventory in real time and generate low-stock alerts
* Send automated order confirmations and shipping notifications
* Provide dashboards for sales trends, product performance, and stock health
* Restrict sensitive data access using roles and profiles
* Support easy import of existing product catalog and historical orders

1. **Stakeholder Analysis**

|  |  |  |
| --- | --- | --- |
| Stakeholder | Role | Key Needs |
| Sales Manager | Oversees sales process | Accurate order tracking, real-time revenue view |
| Warehouse Manager | Manages stock | Inventory alerts, restocking workflows |
| Customer Support | Handles customer queries | Quick access to order status |
| Business Owner/CEO | Decision maker | Dashboards for sales trends & inventory health |
| IT/SF Admin | Configures Salesforce | Maintain scalable, secure setup |

1. **Business Process Mapping**

**Current State (As-Is Process):**

|  |  |  |  |
| --- | --- | --- | --- |
| Step | Owner | Process Description | Pain Points |
| 1 | Sales / Website | Orders are collected manually via website forms, then copied into spreadsheets. | High risk of errors, duplication, delayed order entry. |
| 2 | Warehouse | Stock levels are manually updated once per day. | Stockouts & overselling due to lack of real-time sync. |
| 3 | Customer Support | Customers call or email to check order status. | No self-service, high workload for support team. |
| 4 | Management | Monthly sales & inventory data consolidated manually. | Delayed insights, no real-time KPIs. |

**Future State (To-Be Process):**

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | **Owner** | **Automated Solution in Salesforce** | **Benefit** |
| 1 | Customer / Website | Orders captured directly in Salesforce via LWC form or API integration. | Eliminates manual entry, improves speed and accuracy. |
| 2 | Flow + Trigger | Real-time inventory update when order is placed. Low-stock alerts auto-generated. | Prevents overselling, ensures timely restocking. |
| 3 | Flow + Email Alert | Automatic confirmation email sent to customer with Order ID & tracking details. | Better customer experience, reduced support calls. |
| 4 | Dashboards | Live dashboards show revenue trends, product performance, and inventory health. | Real-time decision-making for management. |

1. **Industry-Specific Use Case Analysis**

* **Order Lifecycle Automation:** Capture orders instantly, update status (Pending → Packed → Shipped → Delivered), and send notifications.
* **Inventory Synchronization:** Real-time stock updates to prevent overselling and ensure timely restocking.
* **Customer Experience:** Automated confirmations, shipment tracking, and proactive communication to reduce support calls.
* **Performance Insights:** Dashboards for revenue, product performance, and stock health, enabling quick management decisions.
* **Scalability & Growth:** Support for increasing order volumes without performance issues, enabling business expansion.