

Salesforce Project Documentation: Replastix Innovations

Project Overview

Replastix Innovations is an organization committed to managing plastic waste and promoting recycling. To improve how they work, they've taken a smart step by integrating Salesforce into their system. This project focuses on automating important processes like tracking plastic waste, managing inventory, handling orders, and generating reports-all within a secure environment. With Salesforce, teams at Replastix can work faster, stay better informed, and reduce manual efforts in day-to-day tasks.

Objectives

- Keep an eye on plastic stock levels automatically and raise alerts when it's low.
- Track the entire journey of plastic waste-from collection to recycling.
- Make sure restock requests are generated automatically when needed.
- Inform the right people with tasks and emails without manual follow-ups.
- Help management make smarter decisions with dashboards and reports.
- Keep data safe and organized through roles and permissions.

Phase 1: Understanding and Planning

What Problems We Wanted to Solve

- Knowing when plastic stock is running low without manual checks.
- Assigning collected waste to the right recycling center.
- Making sure orders don't get delayed because of low stock.
- Keeping everyone informed-without chasing emails.
- Viewing everything in one place: products, waste, orders, and reports.

Our Goals

- Automate stock tracking and update processes.
- Simplify the restocking and approval workflow.
- Track plastic waste and link it to a recycling center based on capacity.
- Assign roles so every team member sees only what they need.

What We Built

Salesforce Project Documentation: Replastix Innovations

- Custom objects: Plastic Waste, Recycling Center, Recycled Product, Order, Restock Request.
- Fields include: Weight, Type, Capacity, Threshold, Status, and more.

Security Structure

- CEO > Recycling Manager, Sales Representative > Warehouse Supervisor
- Profiles and Permission Sets control access.

Phase 2: Backend Development & Automation

- Apex Class (InventoryManager) to handle stock logic.
- Trigger to update stock when restock is approved.
- Scheduled Flow to check for low stock daily.
- Flow to handle waste status changes.

Phase 3: Interface & Experience

- Created a custom Lightning App: Replastix CRM.
- Record Pages and Dynamic Forms for user-friendly UI.
- Dashboards include: Waste Types, Center Load, Stock Alerts.

Phase 4: Testing, Security & Data

- Used Data Import Wizard for Products, Waste, Centers.
- Tested scenarios like stock updates, request approvals, and flows.
- Test Classes ensured 90%+ coverage.
- Role-based visibility and field-level access implemented.

Phase 5: Deployment & Maintenance

- Deployed via Change Sets.
- Manual steps: profile assignment and data import.
- Weekly dashboard reviews and flow error logs.
- Email alerts on approvals and flow errors.

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Conclusion

The Salesforce implementation has made life easier for Replastix Innovations. Now, inventory updates automatically, restocks aren't missed, and plastic waste can be tracked from pickup to recycling. It saves time, avoids errors, and keeps everyone informed.

Future Enhancements

- AI predictions for stock needs.
- Chatbot for quick info.
- Vendor integration.
- Mobile app for waste tracking.