# Smart E-Commerce CRM – Customer Engagement & Order Management System

## Industry

E-Commerce / Retail

## Project Type

B2C Salesforce CRM Implementation

## Target Users

E-Commerce Managers, Sales Teams, Customer Support Agents, Delivery Staff, and Customers

## Problem Statement

An online retail company manages thousands of daily orders, customer inquiries, and product returns. However, order tracking and customer support are fragmented across different systems (website, email, WhatsApp, and call center). This results in delayed responses, poor customer satisfaction, and missed opportunities for cross-selling and upselling. Marketing campaigns are generic, leading to low conversion rates.  
  
To address these challenges, the company wants to implement Salesforce CRM to:  
• Automate customer order tracking and notifications  
• Centralize customer purchase history and preferences  
• Manage product returns, refunds, and exchanges efficiently  
• Personalize marketing campaigns based on purchase behavior  
• Provide dashboards for sales performance, customer retention, and delivery efficiency

## Use Cases

1. Lead & Customer Management

* Capture new customer inquiries from website, social media, and call center
* Maintain centralized customer profiles (purchase history, preferences, loyalty points)

1. Order Management

* Track order status (placed, packed, shipped, delivered, returned)
* Send real-time SMS/Email updates to customers

1. Customer Support (Case Management)

* Log complaints about delayed delivery, damaged goods, or refunds
* Assign cases to the right support agents based on issue type
* Track SLA compliance for quick resolution

1. Marketing & Campaign Management

* Launch targeted campaigns based on purchase behavior (e.g., repeat buyers, cart abandonment)
* Send personalized offers via SMS/Email/WhatsApp

1. Returns & Refunds

* Automate return requests and approval workflows
* Track refunds and replacement orders

1. Reporting & Dashboards

* Monitor sales performance by product category and region
* Analyze customer lifetime value (CLV)
* Dashboard for delivery efficiency and customer satisfaction

## Salesforce Tools Involved

### Admin Side

• Objects: Leads, Accounts, Contacts, Opportunities, Orders, Cases  
• Automation: Workflow Rules, Assignment Rules, Approval Processes, Validation Rules  
• Reports & Dashboards  
• Security: Roles, Profiles, Permission Sets

### Developer Side

• Apex Triggers (e.g., auto-send order confirmation & shipping updates)  
• Lightning Components (custom order tracking portal)  
• Integrations (Payment Gateways, Delivery Partners APIs, Marketing Tools)  
• Custom Objects (e.g., 'Returns & Refunds', 'Loyalty Points')