E-Commerce Order Management with Salesforce CRM

Phase 1: Problem Understanding & Industry Analysis
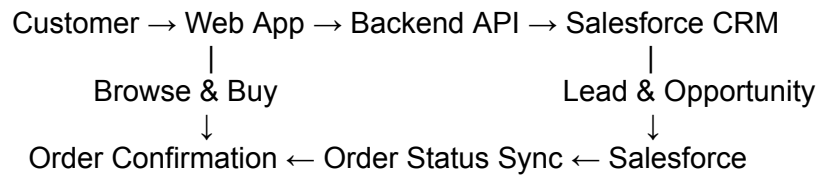
Requirement Gathering

- **Primary Goal:** Build an e-commerce platform that seamlessly integrates with Salesforce to manage leads, opportunities, and order tracking.

- **Functional Requirements:**

  - User registration, login, product catalog, shopping cart, and order placement.

  - Automatic creation of Salesforce **Lead** for every new customer.

  - Automatic creation of Salesforce **Opportunity** for every order.

  - Real-time synchronization of order status from Salesforce to the web dashboard.

- **Non-Functional Requirements:**

  - Scalable backend (Node.js/Express) with secure API endpoints.

  - Responsive frontend (React) for desktop and mobile.

  - Compliance with Salesforce API limits and authentication best practices.

  - Data security for customer information and payment simulation.

Stakeholder Analysis

Stakeholder	Role / Interest	Key Expectations
End Customers	Shop online, track orders	Smooth shopping experience, accurate order updates
Business Owners / Admins	Manage products, view sales performance	Centralized dashboard, quick lead and order creation
Sales Team	Convert leads to customers, close deals	Accurate Lead/Opportunity data inside Salesforce
Developers / IT	Build & maintain system	Clear requirements, scalable architecture
Salesforce CRM Team	Ensure CRM usage & reporting	Proper object mapping, API integration stability

Business Process Mapping

High-level flow:

```
Customer → Web App → Backend API → Salesforce CRM
              |                          |
         Browse & Buy              Lead & Opportunity
              ↓                          ↓
Order Confirmation ← Order Status Sync ← Salesforce
```

Steps:

1. Customer browses products and adds to cart.

2. On checkout, backend:

   ○ Creates **Lead** record (new customer).

   ○ Creates **Opportunity** record (new order).

3. Salesforce updates Opportunity stage (e.g., Processing, Shipped).

4. Web app fetches updates and displays to customer/admin.

Industry-Specific Use Case Analysis

E-Commerce Sector Challenges Addressed:

● **Fragmented Customer Data:** Many e-commerce businesses keep CRM separate; our solution unifies customer info in Salesforce.

● **Manual Lead Creation:** Integration removes manual entry, improving sales team efficiency.

● **Order Visibility:** Real-time status sync enhances customer satisfaction and reduces support tickets.

Competitive Advantage:

● Provides a 360-degree customer view inside Salesforce (purchase history, preferences).

● Scalable architecture ready for multi-vendor or marketplace expansion.

AppExchange Exploration

● **Salesforce AppExchange** offers pre-built solutions to accelerate development or add features:

- ○ **Salesforce Order Management** – to extend or replace custom Opportunity logic.

- ○ **Marketing Cloud Connect** – for automated marketing campaigns based on Leads.

- ○ **Mailchimp for Salesforce** – to manage email marketing.

- ○ **Einstein Analytics** – advanced reporting and predictive insights.

- After reviewing, we plan to use **standard Salesforce Sales Cloud objects (Lead & Opportunity)** for the MVP, while keeping the door open for future AppExchange integrations.

Deliverables for Phase 1

- Requirements document (functional & non-functional).

- Stakeholder matrix.

- Business process diagram.

- Industry analysis report.

- Short AppExchange evaluation notes.