

Phase 1 – Project Documentation

Project Title: Smart Retail Customer Insights Tracker

1. Problem Statement

Retail businesses often struggle to track customer behaviour, purchases, and loyalty in a structured way. Without proper tracking, it becomes difficult to:

- Identify high-value customers.
- Reward loyal customers with points or incentives.
- Monitor trends in customer purchases and product popularity.
- Make data-driven decisions to improve sales and engagement.

Solution: A Salesforce-based **Smart Retail Customer Insights Tracker** that allows retailers to manage customer data, track purchases, calculate loyalty points, and generate dashboards with actionable insights.

2. Introduction

The **Smart Retail Customer Insights Tracker** is a Salesforce application designed to help retailers manage customer information, track purchases, and gain insights into customer behavior. The system supports business owners and sales teams in identifying high-value customers, monitoring trends, and improving customer retention.

3. Objectives

- Store and manage customer information efficiently.
- Record purchases made by each customer.
- Automatically calculate loyalty points based on purchase amounts.
- Segment customers into categories such as Gold, Silver, and Bronze based on spending.
- Generate dashboards for top customers, product trends, and customer engagement insights.

4. Scope

- Designed for retail businesses to track customer engagement and purchases.
- Includes:
 - **Custom Objects:** Customer, Product, Purchase
 - **Automation:** Salesforce Flows for loyalty points and customer segmentation

- **Reports & Dashboards:** Insights into top customers, loyalty tiers, and purchase trends

5. Stakeholders / End Users

- **Retail Business Owners:** Track customer activity and loyalty.
- **Sales/Customer Service Teams:** View customer details and purchase history.
- **Managers:** Analyze dashboards to identify trends and high-value customers.

6. Process Flow

1. Add a new customer into the CRM.
2. Record purchases made by the customer.
3. Salesforce Flow calculates loyalty points automatically.
4. System updates customer status (Gold, Silver, Bronze) based on points or total spend.
5. Dashboards display top customers, product trends, and engagement insights.

7. Modules / Features

- **Customer Management:** Add, edit, and view customer details.
- **Purchase Tracking:** Record purchases with product, amount, and date.
- **Loyalty Points System:** Automatic calculation of points for each purchase.
- **Customer Segmentation:** Gold, Silver, Bronze based on total points or spending.
- **Dashboards & Reports:** Visualize spending trends, top customers, and loyalty tiers.

8. Tools & Platform

- Salesforce Developer Edition
- Salesforce Custom Objects, Flows, Reports, and Dashboards
- Data Import Wizard (for adding sample data)

9. Expected Outcomes

- A working Salesforce app to manage customers and track purchases.
- Automatic calculation of loyalty points and classification into tiers.
- Dashboards providing actionable insights on customer behavior and purchase trends.
- Professional, demo-ready project suitable for submission and evaluation.

