**Project Title: Smart Dealer & Distributor CRM – Manufacturing Supply Chain Management System**

**Industry:** Manufacturing

**Target Users:** Sales Managers, Dealers, Distributors, and Customer Support Teams

**Problem Statement**

A manufacturing company distributes its products through multiple dealers and distributors across different regions. Currently, all dealer onboarding, order requests, stock updates, and complaint resolutions are handled via emails, phone calls, and spreadsheets.

This leads to:

* Delayed order processing and delivery.
* No visibility into real-time inventory or dealer performance.
* Miscommunication between sales teams and distributors.
* Lack of centralized data for decision-making.

To solve this, the company wants to implement a **Salesforce CRM solution** to streamline dealer management, automate order tracking, and provide real-time insights into supply chain performance.

**Project Overview**

The system will provide a centralized platform for managing dealers and distributors, automating order lifecycle (from placement to delivery), and enabling real-time communication.

It will:

* Simplify dealer onboarding and profiling.
* Automate distributor order capture and stock allocation.
* Track complaints and service requests with automated assignment.
* Generate dashboards for regional sales, dealer performance, and pending orders.

This will reduce delays, improve communication, and enhance dealer satisfaction.

**Objectives**

* Automate **order management** and reduce manual errors.
* Provide a **single view of dealer/distributor data**.
* Enable **faster issue resolution** through automated case management.
* Improve **supply chain visibility** with dashboards and reports.
* Strengthen **dealer relationships** with timely updates and personalized engagement.

**Use Cases**

1. **Dealer Onboarding**
   * Register new dealers with company profile, location, and sales region.
   * Assign appropriate sales managers automatically.
2. **Order Management**
   * Allow dealers to place orders via a self-service portal.
   * Track status (Pending, Approved, Dispatched, Delivered).
3. **Inventory Tracking**
   * Maintain real-time product stock availability.
   * Alert managers when inventory is low.
4. **Complaint & Service Requests**
   * Dealers log complaints (damaged goods, delayed delivery).
   * Automatically assign cases to the right department.
5. **Reporting & Dashboards**
   * Regional sales performance.
   * Top-performing dealers/distributors.
   * Pending orders and complaint resolution times.

**PHASES**

**Phase 1: Problem Understanding & Industry Analysis**

* Gather requirements from manufacturing managers, dealers, and distributors.
* Identify key challenges: order delays, inventory tracking, dealer complaints.
* Map the current manual process (emails, calls, spreadsheets).
* Analyze manufacturing industry best practices and explore existing CRM solutions.

**Phase 2: Org Setup & Configuration**

* Choose Salesforce Edition (Enterprise/Developer).
* Configure company profile (manufacturing company name, fiscal year, business hours).
* Set up users: Sales Managers, Dealer Managers, Customer Support.
* Assign appropriate roles, profiles, and permission sets.

**Phase 3: Data Modeling & Relationships**

* Create **Custom Objects**:
  1. *Dealer* (Dealer Name, Location, Region, Contact Info).
  2. *Distributor* (Distributor Name, Assigned Dealer, Territory).
  3. *Order* (Product, Quantity, Status, Dealer Reference).
  4. *Complaint* (Issue Type, Priority, Resolution Status).
* Define relationships:
  1. Dealer ↔ Distributor (Lookup).
  2. Dealer ↔ Order (Master-Detail).
  3. Dealer ↔ Complaint (Master-Detail).

**Phase 4: Process Automation (Admin)**

* Validation rules (e.g., order quantity cannot be negative).
* Workflow rules for automatic email/SMS confirmation on order placement.
* Approval process for bulk orders.
* Flow Builder: auto-assign complaints to correct department.
* Notifications for low inventory alerts.

**Phase 5: Apex Programming (Developer)**

* Apex Triggers to auto-update order status when dispatched/delivered.
* Batch Apex for processing bulk dealer orders.
* Queueable Apex for complaint escalations.
* Test Classes to ensure automation works correctly.

**Phase 6: User Interface Development**

* Build **Lightning Apps** for Sales Managers and Dealers.
* Create record pages for Dealer, Order, Complaint.
* Dealer Portal using **LWC (Lightning Web Components)** for order placement and complaint logging.
* Utility bar with quick links for stock updates and pending orders.

**Phase 7: Integration & External Access**

* Integrate with **ERP system** for real-time stock updates (via REST API).
* Enable external dealer portal with secure login.
* Use Named Credentials for third-party logistics/shipping tracking.

**Phase 8: Data Management & Deployment**

* Import dealer/distributor master data using Data Loader.
* Maintain backups and exports.
* Deploy changes to sandbox → staging → production via Change Sets.

**Phase 9: Reporting, Dashboards & Security Review**

* Create dashboards:
  1. Regional Sales Performance.
  2. Top 10 Dealers by Revenue.
  3. Complaint Resolution Time.
* Set up sharing rules (dealers only see their own orders).
* Apply IP restrictions and audit trails for security.