CRM Project – E-commerce Order & Delivery Tracking System

Phase 1: Problem Understanding & Industry Analysis

> **Goal:** Track orders from placement → packing → shipping → delivery.

1. Requirement Gathering

The first step is to understand the core requirements of an **E-commerce Order and Delivery Tracking System**.
Key functional requirements include:

- Enable customers to place and manage orders.

- Track orders across multiple stages: *Placed → Packed → Shipped → Out for Delivery → Delivered/Failed*.

- Provide real-time delivery status updates to customers via **Email/SMS/Portal**.

- Support order assignment to delivery agents (manual or automated).

- Manage exceptions such as **delayed deliveries, failed attempts, or returns**.

- Generate actionable reports and dashboards for monitoring:

    - Daily/Monthly order volumes.

    - On-time vs delayed deliveries.

    - Delivery agent performance.

    - Region-wise delivery success rate.

2. Stakeholder Analysis

The system must cater to the needs of multiple stakeholders:

- **Admin**: Oversees system setup, monitors performance, configures business rules.

- **Customer**: Places orders and tracks delivery status in real time.

- **Delivery Agent**: Updates the status of assigned deliveries (shipped, delivered, failed).

- **Support Team**: Handles customer queries, reschedules failed deliveries, and processes refunds.

- **Manager**: Reviews KPIs, approves escalations/refunds, and ensures SLA compliance.

3. Business Process Mapping

The end-to-end process can be summarized as follows:

1. **Customer places an order** through the e-commerce platform.

2. **System creates an Order record** with relevant details.

3. **Order is assigned** to a delivery agent or logistics partner.

4. **Delivery agent updates status** as the order progresses through its lifecycle.

5. **System sends notifications** to the customer at each stage.

6. **In case of failure/delay**, the support team intervenes.

7. **Reports and dashboards** are generated for managers to analyze overall efficiency.

This process ensures **transparency, accountability, and customer satisfaction**.

4. Industry-Specific Use Case Analysis

In the **e-commerce and logistics industry**, order tracking plays a vital role in customer trust and retention.

❖ **High-volume operations**: Thousands of orders may need simultaneous tracking.

❖ **Strict SLAs**: Deliveries must be completed within promised timelines (e.g., 24–48 hours).

❖ **Third-party logistics**: Many businesses rely on multiple courier partners, requiring API integration.

❖ **Customer experience**: Real-time updates and proactive issue resolution directly impact brand reputation.

By addressing these challenges, the system becomes a **critical enabler of business growth**.

5. Existing Solutions vs Custom Build

While several **pre-built logistics and tracking apps** exist in Salesforce AppExchange, they are often complex or costly.
For this project, we will **design a simplified, custom solution** to meet essential requirements while ensuring scalability and flexibility.