INVENTORY & ORDER MANAGEMENT

Phase1: Problem Statement & Project Documentation

1. Problem Understanding & Industry Analysis

Inventory and order management is a core challenge in retail, wholesale, e-commerce, and manufacturing industries. Businesses often face:

- Inaccurate stock tracking (leading to overstocking or stockouts).

- Manual order handling causing delays and errors.

- Lack of visibility into sales performance.

By leveraging Salesforce CRM, we can provide a centralized platform for inventory tracking, automated order processing, and real-time reporting. This ensures efficiency, accuracy, and scalability.

2. Requirement Gathering

For this project, the requirements were gathered by considering the needs of a small to mid-sized business. Key requirements include:

- Ability to add/update products with stock quantity.

- Track customer orders linked to products.

- Automatically reduce stock levels when an order is confirmed.

- Generate low-stock alerts when products reach threshold.

- Provide sales insights via reports and dashboards.

3. Stakeholder Analysis

The system involves the following key stakeholders:

- Sales Representatives → Create orders, view product availability.

- Inventory Managers → Update stock levels, monitor low stock.

- Sales Managers/Executives → Approve high-value orders, analyze reports.

- Customers (Indirect Stakeholders) → Benefit from faster and more reliable order processing.

4. Business Process Mapping

The business flow can be mapped as:

1. Product Setup → Add products with stock details.

2. Order Creation → Sales rep creates customer orders.

3. Stock Adjustment → System reduces stock when order is confirmed.

4. Approval Process → Orders above a threshold trigger manager approval.

5. Reporting → Managers view dashboards for inventory levels, sales trends, and performance.

This flow ensures end-to-end management of inventory and order fulfilment.

5. Industry-specific Use Case Analysis

This project applies to multiple industries:

- Retail/E-commerce → Manage product catalog, customer orders, discounts.

- Wholesale/Distribution → Bulk orders, stock movement, warehouse tracking.

- Manufacturing → Track raw materials and finished goods inventory.

Each industry benefits from Salesforce's scalability and automation features for order processing.

6. AppExchange Exploration

Salesforce AppExchange has several inventory/order management apps (e.g., Rootstock Cloud ERP, Accounting Seed, Propel).
For this project:

- We explored how these apps handle stock, orders, and workflows.

- Instead of installing a full ERP app, we built a custom lightweight version tailored for beginners.

- This approach helps understand Salesforce fundamentals before moving to enterprise-level apps.

Entity -Relation Table:

Entity	Attributes (Examples)	Description
Product	ProductID, Name, Category, Price, StockQty	Items available in inventory
Customer	CustomerID, Name, Email, Address	People placing orders
Order	OrderID, CustomerID, OrderDate, Status	Records of customer orders
Order Item	OrderItemID, OrderID, ProductID, Quantity	Links products to orders
Supplier	SupplierID, Name, Contact, ProductsSupplied	Vendors providing stock
Inventory Log	LogID, ProductID, ChangeQty, Timestamp, Reason	Tracks stock movement (add, sale, return)

Process Flow:

Process	Input	Output	Stakeholder
Add new product	Product details	Product added to inventory	Admin
Place order	Customer selects products	Order record created	Customer
Update stock	Order confirmation / supply	Stock quantity updated	System
Generate invoice	Order details	Invoice sent to customer	System
Reorder stock	Low stock alert	Supplier request sent	Admin