**Art Gallery CRM Project**

# Phase 1: Problem Understanding & Industry Analysis

👉 **Goal:** Understand what we’re building, why it’s needed, and how it fits into the art gallery industry.

### **1. Requirement Gathering**

To build a CRM that actually solves the challenges faced by an art gallery, requirements should be collected from different stakeholders involved in daily operations:

* **Curators / Gallery Managers**
  + Need to organize exhibitions with start/end dates, assign artworks, and ensure proper documentation of participating artists.
  + Require visibility into artwork inventory and availability (which artworks are sold, reserved, or displayed).
  + Want performance metrics (top-selling artists, exhibition attendance).
* **Sales/Finance Teams**
  + Must record artwork sales with accuracy.
  + Need automatic calculation of commissions (artist vs gallery share).
  + Require invoicing and financial reporting for sales and revenue.
* **Visitors / Event Attendees**
  + Want a simple registration process for exhibitions and events.
  + Expect confirmation emails and reminders.
  + Prefer personalized communication for upcoming events.
* **Artists**
  + Expect transparency in sales (notifications when their artwork is sold).
  + Need clarity on commission amounts.
  + Want a record of which exhibitions feature their work.

**Example requirements gathered:**

* Maintain a digital catalogue of all artworks with images, prices, and status.
* Allow curators to schedule and manage exhibitions.
* Automate artwork status updates after a sale.
* Calculate and record artist commissions without manual errors.
* Capture and manage visitor registrations for exhibitions.
* Generate reports on sales trends, artwork inventory, and visitor engagement.

### **2. Stakeholder Analysis**

Different users will interact with the CRM in different roles.

* **Admin (You / Gallery IT Manager)**
  + Configures Salesforce objects, fields, and automations.
  + Ensures data security, access control, and system customization.
* **Curators / Gallery Managers**
  + Create and manage exhibitions.
  + Assign artworks to exhibitions.
  + Monitor artwork availability and sales reports.
* **Sales / Finance Staff**
  + Record sales and track payments.
  + Verify commission calculations.
  + Generate financial and sales dashboards.
* **Visitors / Customers**
  + Register for exhibitions/events.
  + Receive confirmation and follow-up emails.
  + Provide feedback on exhibitions.
* **Artists** (indirect stakeholders)
  + Receive automated notifications when artworks are sold.
  + Benefit from transparent tracking of their sales and commissions.

### **3. Business Process Mapping**

We can map the gallery’s operations as a simple workflow:

1. **Exhibition Planning**
   * Curator creates an exhibition → assigns artworks and artists → publishes details.
2. **Visitor Registration**
   * Visitor registers online → record created in CRM → email confirmation sent.
3. **Artwork Sale**
   * Sales agent records sale → system validates reserve price → sale is confirmed.
4. **Post-Sale Updates**
   * Artwork status changes to Sold.
   * Commission calculation is triggered → artist and gallery notified.
5. **Reporting**
   * Manager reviews dashboards (sales, visitor registrations, top artists).

This ensures smooth transitions from planning → execution → reporting, without manual errors.

### **4. Industry-Specific Use Case Analysis**

The art gallery industry has unique challenges compared to generic retail or event businesses:

* **Artwork Inventory is Limited & Unique**
  + Each artwork is one-of-a-kind; once sold, it cannot be resold.
  + Tracking availability and preventing duplicate sales is critical.
* **Artist-Gallery Financial Relationship**
  + Commission-based revenue sharing is standard.
  + Galleries must ensure transparent and fair calculation of commissions.
* **Exhibition as Core Revenue Driver**
  + Success depends on visitor engagement and sales during exhibitions.
  + Visitor registration data helps forecast attendance and measure success.
* **Visitor Experience**
  + Personalized communication (invitations, reminders) encourages loyalty.
  + Repeat visitors and VIP customers can be identified for special events.

Thus, our CRM must handle **inventory management, automated commission workflows, event/visitor tracking, and visitor engagement** seamlessly.

### **5. AppExchange Exploration**

* A quick search on **Salesforce AppExchange** shows event management and inventory tracking apps, but very few specifically for **art galleries**.
* Some “museum” or “event ticketing” apps exist, but they are too generic or overly complex.
* Instead, we will build a **custom, lightweight Art Gallery CRM** tailored specifically for:
  + Artwork inventory (one-of-a-kind items).
  + Commission-based sales tracking.
  + Exhibition-focused visitor engagement.

This ensures the project is **unique, practical, and a strong fit for a resume**, while also giving you hands-on Salesforce customization experience.

# Phase 2: Org Setup & Configuration

### 👉 **Goal:** Prepare Salesforce environment for Art Gallery CRM.

This phase ensures the foundational Salesforce setup (users, roles, permissions, org-wide defaults, etc.) matches the business needs of an **Art Gallery** (tracking exhibitions, artists, artwork sales, visitor registrations).

### Z4**1. Salesforce Edition**

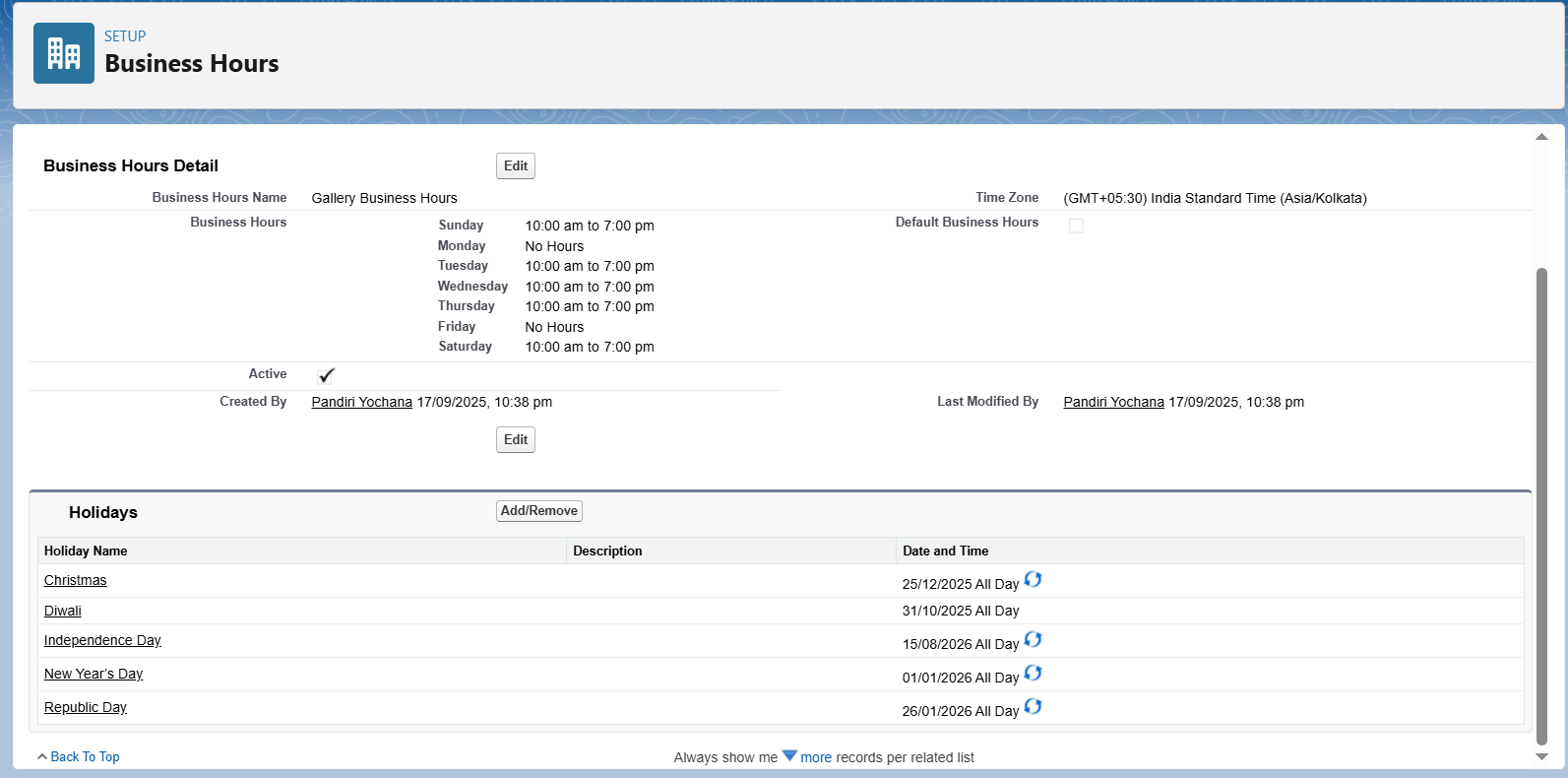
* Used **Salesforce Developer Edition (Free Dev Org)** to build the project.
* This edition provides standard CRM features, custom objects, workflow automation, reports, and dashboards – enough to model gallery processes.

### **2. Company Profile Setup**

* Navigated to **Setup → Company Information**.
* Configured company as:
  + **Company Name:** Modern Art & Exhibitions Pvt. Ltd.
  + **Primary Language:** English.
  + **Time Zone:** Asia/Kolkata (IST).
  + **Currency:** INR (₹), since sales reporting and artwork pricing in India is mostly in rupees.

### **3. Business Hours & Holidays**

* Defined **Gallery Business Hours: 10 AM – 7 PM** (Tuesday–Sunday).
* Added **Holidays** like Independence Day, Diwali, New Year, when exhibitions remain closed.
* This ensures workflows like approvals or visitor event notifications won’t trigger on closed days.



### **4. Fiscal Year Settings**

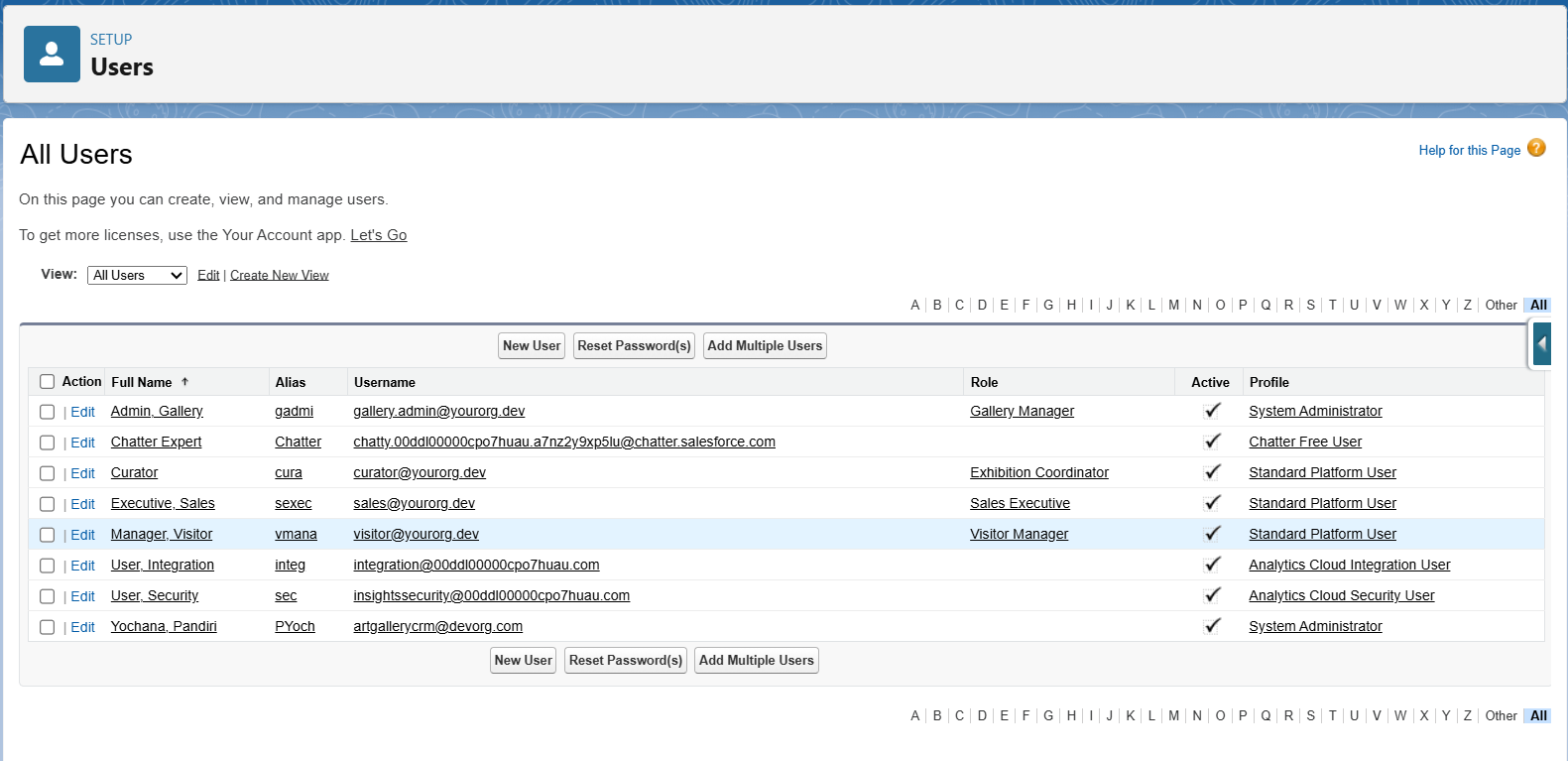
* Kept **Standard Fiscal Year (Jan–Dec)** → suitable for generating sales and revenue reports per quarter.
* Example: Quarterly sales of artworks per exhibition.

### **5. User Setup & Licenses**

Created users with different roles:

1. **Gallery Admin** – Full system control.
2. **Exhibition Coordinator** – Manages exhibitions and assigns artists.
3. **Sales Executive** – Handles artwork sales, generates invoices.
4. **Visitor Manager** – Manages visitor registrations & event RSVPs.

Each user assigned **Salesforce Platform License** for custom CRM usage.



### **6. Profiles**

* **Exhibition Coordinator Profile:** Can create/manage exhibitions and assign artists but restricted from altering sales data.
* **Sales Executive Profile:** Can create/edit artwork sales, but limited read-only access to exhibitions.
* **Visitor Manager Profile:** Manages visitor objects but no access to revenue reports.
* **Admin Profile:** Full CRUD access across all objects.

### **7. Roles**

Defined role hierarchy to maintain data visibility:

* **Gallery Manager (Top Role)**
  + **Exhibition Coordinator**
  + **Sales Executive**
  + **Visitor Manager**

This ensures managers can see all data, while lower roles see only their relevant records.

### **8. Permission Sets**

Instead of editing profiles repeatedly:

* Created **"Reports Access" Permission Set** → assigned to Coordinators who need to analyse exhibitions.
* Created **"Artwork Pricing Update" Permission Set** → given to selected Sales Executives.

### **9. Org-Wide Defaults (OWD)**

Set record-level security:

* **Exhibitions:** Public Read Only → all users can view exhibitions but only Coordinator/Admin can edit.
* **Artists:** Public Read Only.
* **Artworks & Sales Records:** Private → only Sales Executives/Managers can view/edit their sales.
* **Visitor Registrations:** Private → only assigned Visitor Manager can see/edit.

### **10. Sharing Rules**

Added rules for collaboration:

* Allowed **Sales Executives** to view artwork sales created by other executives (for team collaboration).
* Coordinators can view **visitor registrations** for exhibitions they manage.

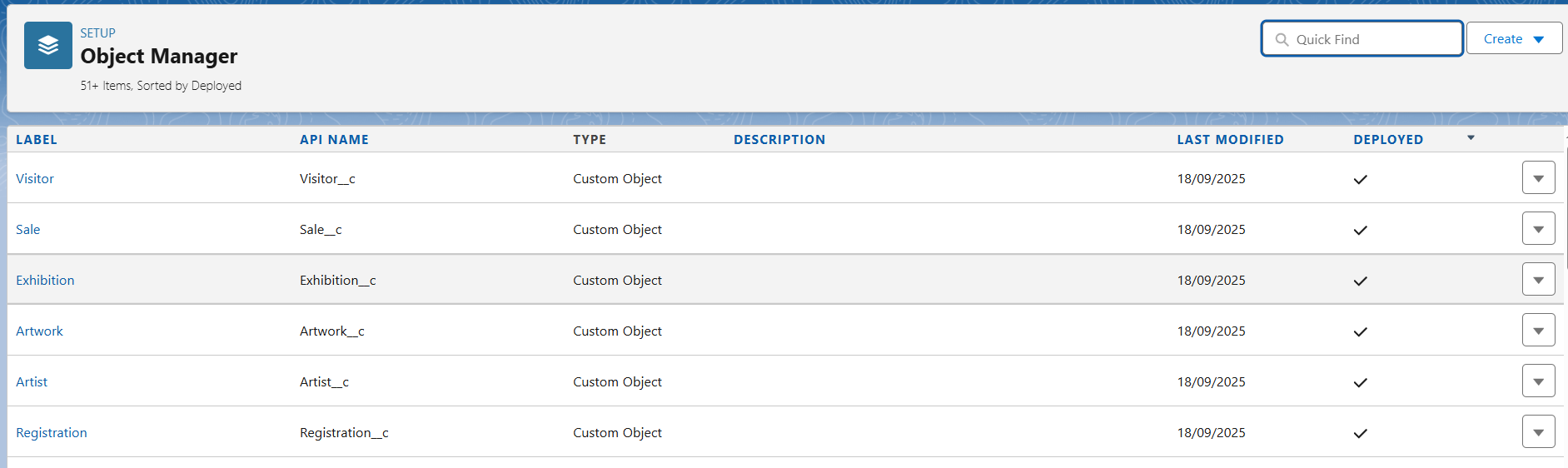
### **11. Login Access Policies**

* Restricted **Visitor Manager & Sales Executives login access** → 10 AM – 7 PM (business hours).
* Admin has unrestricted login.

### **12. Developer Org Setup**

This Dev Org acted as the **sandbox environment** where I configured:

* Custom Objects (Exhibition, Artist, Artwork, Visitor Registration, Sales).
* Roles, Profiles, and Sharing Rules.



### **13. Sandbox Usage (Conceptual)**

* In real implementation, all configs would be tested in **Sandbox** before pushing to production.
* Since Developer Edition was used, sandbox acted as the test environment.

### **14. Deployment Basics**

* For real org:
  + Move components (Objects, Workflows, Reports, Dashboards) using **Change Sets** to Production.
  + Versioning ensures stability before release.

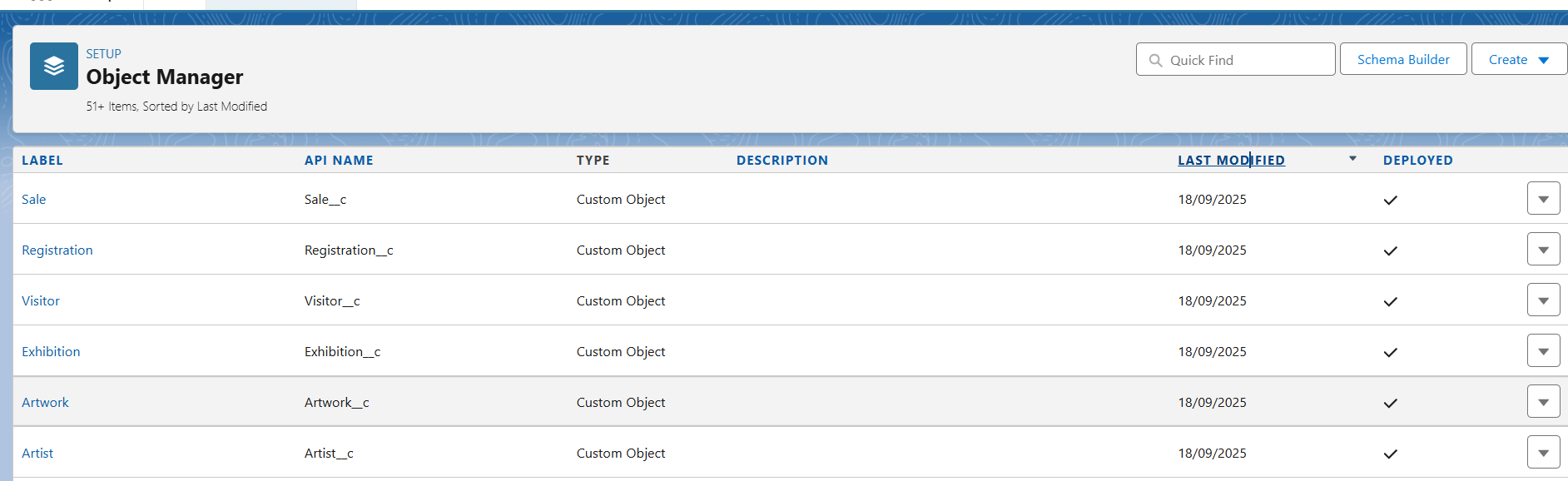
# Phase 3: Data Modeling & Relationships

👉 **Goal**: Define the data model (objects, fields, relationships) that forms the foundation of the Art Gallery CRM.

## ****1. Standard & Custom Objects****

We’ll use a mix of Salesforce **standard objects** and **custom objects** to capture all gallery operations.

* **Standard Objects**
  + **Contact** → used for Visitors (name, phone, email, etc.).
  + **User** → system users (Admin, Sales Executive, Curator, Visitor Manager).
  + **Account (optional)** → could be used if gallery wants to group corporate clients or sponsors.
* **Custom Objects**
  + **Artist\_\_c** → stores details of artists.
  + **Artwork\_\_c** → each piece of art, linked to Artist.
  + **Exhibition\_\_c** → gallery exhibitions/events.
  + **Sale\_\_c** → records sales of artworks.
  + **Visitor\_\_c** → visitor information (beyond standard contact fields).
  + **Registration\_\_c** → links Visitors with Exhibitions (attendance tracking).



## ****2. Fields****

Each custom object will have its own set of custom fields.

* **Artist\_\_c**
  + Name (Text)
  + Nationality (Picklist)
  + Specialty (Picklist: Painting, Sculpture, Photography, Digital Art, etc.)
  + Biography (Long Text Area)
* **Artwork\_\_c**
  + Title (Text)
  + Medium (Picklist: Oil, Acrylic, Marble, Bronze, etc.)
  + Price (Currency)
  + Status (Picklist: Available, Reserved, Sold, On Loan)
  + Artist (Lookup → Artist\_\_c)
* **Exhibition\_\_c**
  + Name (Text)
  + Start Date (Date)
  + End Date (Date)
  + Location (Text)
  + Theme (Text)
  + Coordinator (Lookup → User)
* **Sale\_\_c**
  + Sale Date (Date)
  + Sale Price (Currency)
  + Buyer (Lookup → Contact)
  + Artwork (Lookup → Artwork\_\_c)
  + Artist Commission (Formula: % of Sale Price)
* **Visitor\_\_c**
  + Name (Text)
  + Email (Email)
  + Phone (Phone)
  + Membership Status (Picklist: Regular, Premium, Guest)
* **Registration\_\_c**
  + Visitor (Lookup → Visitor\_\_c)
  + Exhibition (Lookup → Exhibition\_\_c)
  + Registration Date (Date)
  + Ticket Type (Picklist: Free, VIP, Student, Early Bird)

## ****3. Record Types****

Record Types let us handle different scenarios within one object.

* **Exhibition\_\_c** →
  + **Solo Exhibition** (single artist show)
  + **Group Exhibition** (multiple artists)
* **Sale\_\_c** →
  + **Direct Sale** (sold at gallery)
  + **Auction Sale** (sold at event/auction)

## ****4. Page Layouts****

Page layouts define what users see.

* **Artist\_\_c Page Layout**
  + Artist Info → Name, Nationality, Specialty, Bio
  + Related List: Artworks
* **Artwork\_\_c Page Layout**
  + Artwork Info → Title, Medium, Year, Status
  + Related Lists: Artist, Sales History, Exhibitions shown in
* **Exhibition\_\_c Page Layout**
  + Exhibition Info → Name, Dates, Theme, Location
  + Related Lists: Assigned Artworks, Visitor Registrations
* **Sale\_\_c Page Layout**
  + Sale Info → Sale Date, Price, Buyer
  + Related: Artwork details
* **Visitor\_\_c Page Layout**
  + Visitor Info → Name, Membership Status
  + Related Lists: Registrations
* **Registration\_\_c Page Layout**
  + Registration Info → Exhibition, Ticket Type
  + Related: Visitor Details

## ****5. Compact Layouts (for mobile & list views)****

Compact layouts summarize key fields.

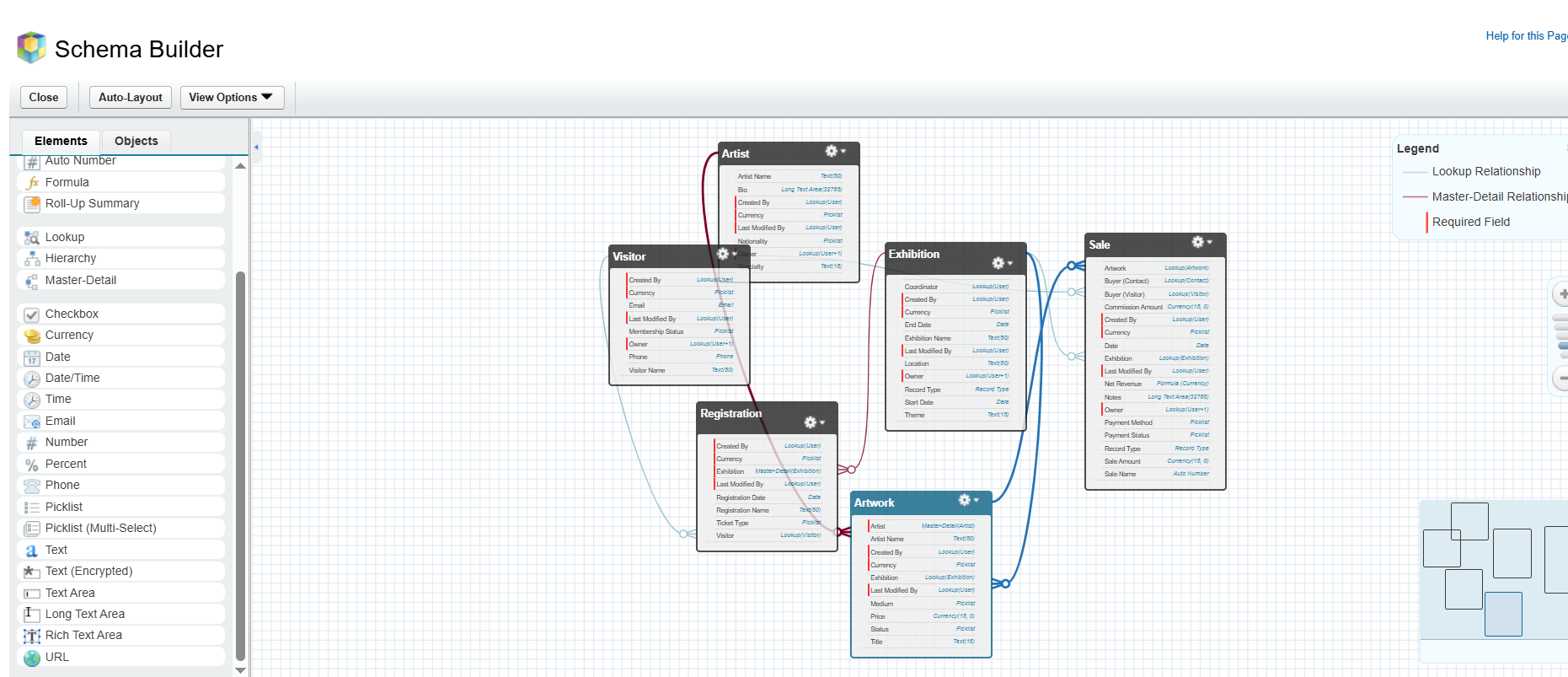
* **Artwork\_\_c Compact Layout**
  + Title, Medium, Price, Status
* **Exhibition\_\_c Compact Layout**
  + Name, Start Date, End Date, Location
* **Sale\_\_c Compact Layout**
  + Sale Date, Sale Price, Artwork

## ****6. Schema Builder****

Use Schema Builder (Setup → Schema Builder) to **visualize the relationships**.

* Artist\_\_c → Artwork\_\_c (Lookup, one Artist to many Artworks).
* Artwork\_\_c → Sale\_\_c (Lookup, one Artwork to one Sale).
* Exhibition\_\_c → Registration\_\_c (Lookup, one Exhibition to many Registrations).
* Visitor\_\_c → Registration\_\_c (Lookup, one Visitor can register for many Exhibitions).

This gives a clear **entity-relationship diagram (ERD)** for the project.



## ****7. Lookup vs Master-Detail vs Hierarchical****

Choose the right relationship type:

* **Artist\_\_c ↔ Artwork\_\_c** → Master-Detail (if Artist is deleted, their artworks should be deleted).
* **Artwork\_\_c ↔ Sale\_\_c** → Lookup (Sale record exists only if artwork is sold, so artwork may exist independently).
* **Exhibition\_\_c ↔ Registration\_\_c** → Master-Detail (a Registration cannot exist without an Exhibition).
* **Visitor\_\_c ↔ Registration\_\_c** → Lookup (a Visitor can exist even if they haven’t registered for any exhibition).

## ****8. Junction Objects****

If an **Artwork** could appear in multiple Exhibitions, we’d need a **junction object** (e.g., ArtworkExhibition\_\_c).  
For now, assume each artwork belongs to one exhibition at a time, so no junction object is needed.

## ****9. External Objects****

If the gallery integrates external systems:

* Example: Insurance database for artwork insurance policies.
* Use **External Objects** in Salesforce (via Salesforce Connect) to reference data without storing it locally.

# Phase 4: Process Automation (Admin)

## ****1. Validation Rules****

Validation rules ensure **data quality**.  
Examples for your objects:

* **Exhibition\_\_c**
  + End\_Date\_\_c > Start\_Date\_\_c (Exhibition cannot end before it starts).
* **Artwork\_\_c**
  + If **Status = "Sold"**, then **Price must not be blank**.
  + If **Medium = Marble or Bronze**, then **Price > 10,000** (to enforce realistic pricing).
* **Sale\_\_c**
  + Sale\_Price\_\_c > 0.
* **Registration\_\_c**
  + **Registration\_Date\_\_c ≤ Exhibition.Start\_Date\_\_c** (visitors cannot register after the exhibition starts).

## ****2. Workflow Rules (legacy, optional)****

⚠️ Salesforce recommends **Flow**, but you can still note workflows.  
Examples:

* When a **Visitor\_\_c** record is created, send a **Welcome Email**.
* When an **Artwork\_\_c** status changes to **Sold**, notify the Curator.

## ****3. Process Builder (legacy, replaced by Flow)****

Process Builder is being retired, but for completeness:

* Could auto-update **Artwork\_\_c.Status → Sold** when a **Sale\_\_c** record is created.
* Could auto-update **Visitor Membership Status** if they purchase art above ₹1,00,000 (upgrade to Premium).

👉 Instead, we’ll implement these in **Flow**.

## ****4. Approval Process****

Approvals are critical in galleries for **high-value transactions**.  
Example:

* **Sale\_\_c → Approval Process**
  + Condition: If Sale\_Price\_\_c > 50,000.
  + Approval goes to **Gallery Manager**.
  + Actions:
    - **Before Approval**: Status = "Pending".
    - **After Approval**: Status = "Confirmed", trigger email to Buyer.
    - **If Rejected**: Status = "Declined", send rejection email to Buyer.

## ****5. Flow Builder (Recommended Tool)****

Flows will be the main automation engine.

### **a) Record-Triggered Flows**

* **Artwork Sale Flow**
  + When a **Sale\_\_c** is created, automatically update the related **Artwork\_\_c.Status → Sold**.
* **Exhibition Capacity Flow**
  + Count Registrations for an Exhibition. If Registrations exceed 200, update Exhibition.Status = "Full".
* **Commission Calculation Flow**
  + Automatically calculate **Artist Commission = Sale Price × 30%** (or dynamic % based on Artist profile).

### **b) Scheduled Flows**

* Daily check for **Exhibitions starting in 7 days** → Send reminders to registered Visitors.

### **c) Screen Flows**

* **Exhibition Registration Screen Flow**
  + A form where a Visitor can pick an Exhibition and Ticket Type.
  + Automatically creates **Registration\_\_c** and sends confirmation email.
* **Artwork Intake Form**
  + For Curators to add a new Artwork, selecting Artist, Medium, Price, etc.

## ****6. Email Alerts****

Examples:

* When a **Sale\_\_c** is approved, send an **Invoice Email** to the Buyer.
* When a Visitor registers for an Exhibition, send a **Ticket Confirmation Email**.
* Send **Reminder Emails** to Visitors 2 days before an Exhibition.

## ****7. Field Updates****

Examples:

* After a **Sale\_\_c** is approved, set **Sale\_Status\_\_c = Confirmed**.
* After **Exhibition End Date**, auto-update **Exhibition.Status\_\_c = Completed**.
* When a Visitor purchases > 5 Artworks, auto-update **Visitor.Membership\_Status = Premium**.

## ****8. Tasks****

Create automatic follow-up tasks:

* After a **Sale\_\_c** is confirmed → Create a task for **Finance Team**: "Prepare Invoice".
* After a **Registration\_\_c** is created → Create a task for **Visitor Manager**: "Welcome Visitor and confirm attendance".
* After a new **Artwork\_\_c** is added → Task for **Curator**: "Verify authenticity and details".

## ****9. Custom Notifications****

Push **real-time in-app notifications** to users.  
Examples:

* Notify Curators when a **new Artwork** is submitted.
* Notify Sales Executive when a **Visitor upgrades to Premium**.
* Notify Exhibition Coordinator when **Registrations exceed 80% capacity**.