CELEBAL TECHNOLOGIES

SUMMER INTERNSHIP PROJECT

ON

REAL TIME LOYALTY MANAGEMENT SYSTEM

Submitted By

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JUNE'2021-JULY'2021

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1.Abstract:

In the area of service providing, customer relation is important for every company. All businesses strive to improve customer loyalty to keep clients purchasing and make them promote their brand to new audiences. From understanding the likes and dislikes of every customer, to suggesting a product or service based on their likes, customer relation management system has set to define a relationship of trust between the company and the customer. There are a number of ways to build customer loyalty -: loyalty program, VIP tiers, event based mails and feedback forms.

This project presents a real time loyalty management system on Salesforce. The idea behind this project is to reward the customer by loyalty points generated by a calculation engine based on the purchase made by the customer, in a certain supermarket. The platform can be used to generate some other useful insights from the data of customer which can be further used to boost the sales.

Keywords: Customer relation, Salesforce, loyalty points.

2.Introduction:

The project aims to build a loyalty points management system on Salesforce platform. Salesforce is a customer relation management platform. A CRM in Salesforce works by managing the standard objects, and maintaining the relationships between them, and the standard in-built functionalities. It is built on the following different types of cloud: - Sales cloud, Service cloud, Marketing cloud, custom cloud, Analytics, Salesforce automation.

We worked on sales cloud. Sales Cloud mainly works based on Lead, Account, Contact & Opportunity objects. Leads can be further converted into account, contact and opportunity objects -an important built-in functionality of the Sales Cloud. If any custom fields are added to the lead object, it is also possible to set the mapping for them.

The custom fields will be the column of detail we want to keep of a purchase made by a customer inside an object. Next will be defining relationships between the fields, inserting formulas where required. The object is the shortcuts inside the application which lets you access the records and fields inside it. The record is the individual customer entry in the table.

3.Objective:

- Real time transactional data will be generated in SFDC.
- This real time data needs to be processed against a calculation engine.
- The data generated after processing the data will be credited into the customer's account, in the form of loyalty points.

3.1.Sub-Objectives:

- To create custom fields and relationships.
- To create objects.
- To upload the data, analyse it.
- Create a calculation engine.
- Generate loyalty point

4.Literature Review:

Salesforce:

- Salesforce is a customer relationship Management platform (CRM), the most important tool in effective loyalty management.
- Loyalty Management is built on the Salesforce platform so businesses can design a variety of different programs that meet their unique needs.
- Salesforce is one of the best cloud-based CRM platforms. It is an integrated CRM platform that provides a single shared view of each customer for all the departments within an organization, such as Marketing, Sales, Commerce, and Service.

Why SFDC?

- It is a number one on-demand CRM.
- Force.com platform Reduce development cost. We can deliver applications in a very short time.
- App Exchange It is a very good marketplace to sell our custom applications and to buy applications from App Exchange.

• It is available on the cloud – No need to install any software and No hardware required.

5.Methodology:

• Create an application

- ✓ Create an application named "Loyalty Management". This is where the all fields and objects will be created.
- ✓ To create an application : Setup->Build->Create->App

• Create object

- ✓ Create object named "Customer details". Inside this object will be our fields and records.
- ✓ Object is created by : Setup->Build->Create->Objects

• Create Custom fields and relationships

- ✓ To create fields, go to Objects->Customer details->New field. We can also define any dependencies between the fields under the "field dependencies" option.
- ✓ We defined 15 fields according to our data set. The fields are:

S.no.

Invoice id,

Branch,

City,

Product unit,

Unit price,

Quantity,

Tax.

Total Price,

Date.

Time.

Payment,

Cogs,

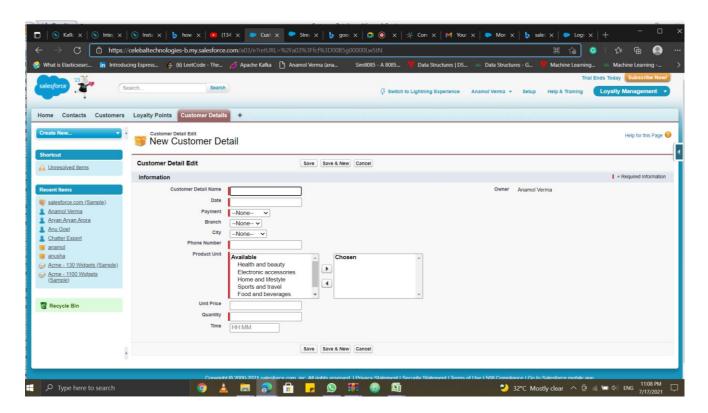
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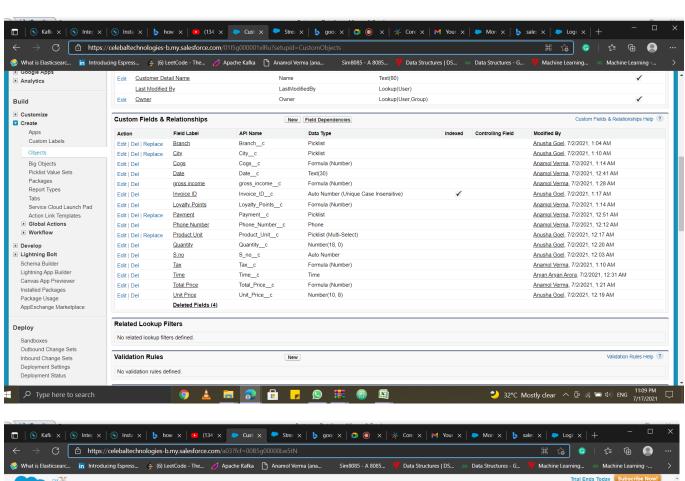
Loyalty points.

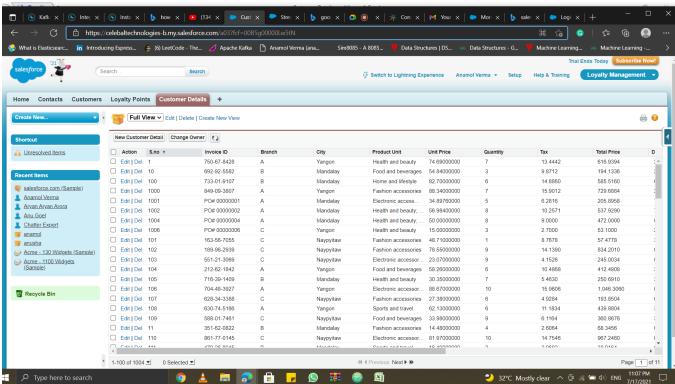
• Upload the data set.

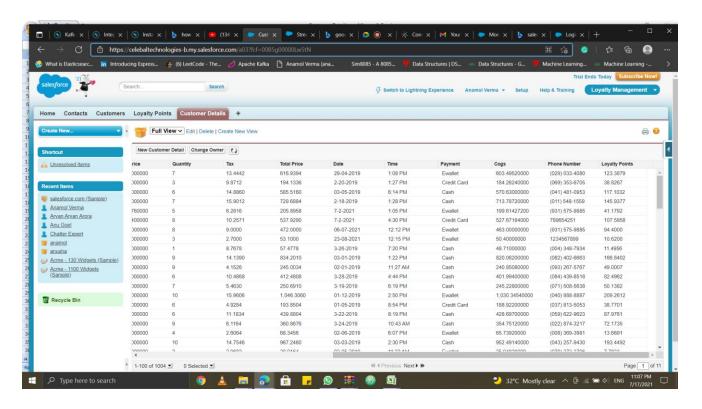
• Calculate loyalty points.

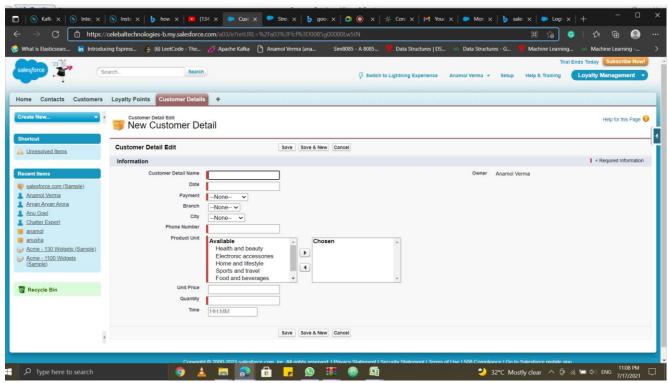
6.Working:

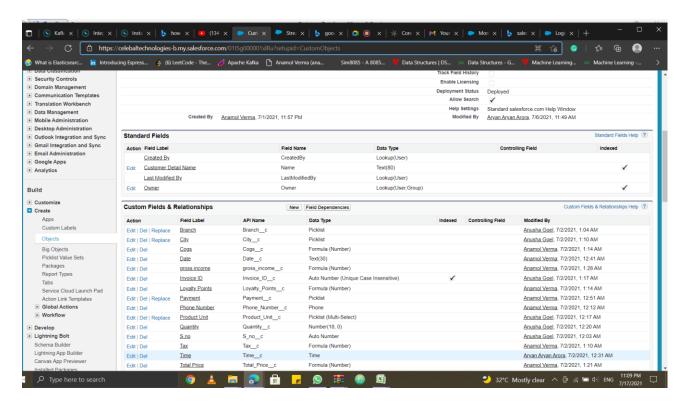


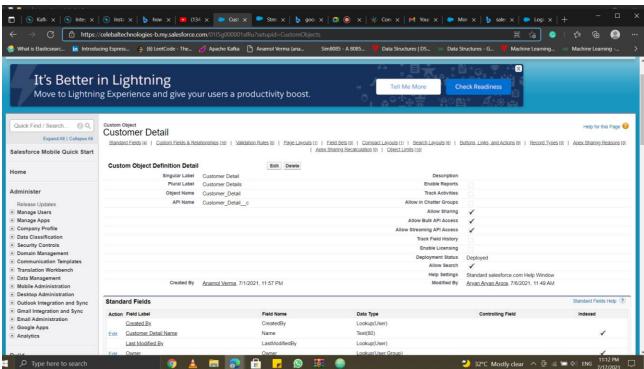












7.Result and future scope:

- Loyalty management system was build successfully.
- Loyalty points are assigned according to the customer purchases.
- Further, it can be used for more analysis (such as how many did payment by E-wallet) and better customer relation management.
- It can also be integrated with Kakfa using Salesforce Streaming API.

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