



## Implementation of Strategic Management Information System for Andhra Express

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“Andhra Express -The foodies’ junction”



By:

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## **Organizational Background Information:**

Andhra Express is Start-up Company founded in year 2016 by T Avinash Reddy, a graduate engineer who worked as a manager in a restaurant, based in Bangalore. From working there, he learnt about different aspects of food industry and thought there is the improvement need to be done in supply chain of food industry therefore he started his own venture, Andhra Express. He organized campaigns from where he developed contacts and his team started visiting corporate companies in Bangalore and provided them the samples of the food they prepared. Due to mouth marketing and service relationship, they developed a brand in the market which helps them to have multinational corporate companies like Infosys, TCS in the testimonial in one year. After success they adopted different strategy of going to ground scale by adopting B2C strategy and started selling food through their restaurant to single consumer by taking regular orders by just clicking on their registered website or manually calling them. The food service which started off with just a basic Andhra meal (typical south Indian meal) has now spread through different cuisine like North Indian, Tandoor and Chinese Meals. They have also included different food items like soups, veg starters and then they started serving drinks like mock-tails and juices. The successful growth of the restaurant in just one year proves the dedication and work involved in building this venture by understanding food consumer market requirement.

## **Market place and Scope:**

The business line of Andhra express is serving regional foods to corporate companies and to the basic consumer on their demands. At present corporate companies in range of 5 Kms are being targeted as customer by Andhra express. Centralized location to all corporate companies gives Andhra express competitive edge over other app base food delivery. Since all the meals match and follow all the health standard set by food industry, the company has created a good brand in the market. The success in Bengaluru has open new market horizon for company which look to open the new venture in different states.

The main reason for choosing Andhra express for our project is to learn their smart business strategy adopted to understand market. At present providing service to the corporate companies has been highly efficient because of transportation range of 5 Kms. Since the venture is being limited to certain aspects like the range of delivery as well as the service is being limited just to corporate companies there is a great scope of improvement as well as the expansion of the business. The customer acquisition cost, customer retention are important factors which will decide longevity of the venture because capital return will result into expansion of the venture in different regions. Motto of company is quite clear to provide best service so keeping the customer satisfaction as priority business model has been developed by providing fast services to people at home by creating an online interactive website/portal with multiple food option where they can place an order from the wide range of regional foods available, whereas all the back-end work such (customers' orders, Initiating emails regarding offers and discounts, order confirmation updates via mail) will be managed using Salesforce. The customers will be benefited will have opportunities to avail discounts after multiple logins. Diversified festival is add on advantage which results in special offer because demand might be high with respect to time so mass production of food is possible. Last second cancellation of order also made available for customers. From the business point of view, we can allocate a delivery team for the quick food delivery services to be provided around the city of Bangalore.

## **Organizational Infrastructure:**

For our project customer relationship management platform, Salesforce is used for implementation. Since it has integrated with all features requires marketing and sales. SWOT analysis is used to define our project because it has certain critical factors which evaluate growth of the company.

### **Strengths:**

1. Centralized access connection to large consumer database to everyone in company due to which transparency is achieved.
2. Customer relationship is easily built because of interactive interface website.
3. Supply chain management is improved so which saves a lot of time and money.
4. The Role of middlemen is eliminated so product can be delivered at the faster, cheaper rate.
5. Automated service helps in reducing workforce and using workforce in areas to be improve high data protection because whole data is stored in cloud.

### **Weaknesses:**

1. Salesforce training required at the initial phase and at every phase someone should be there to operate it because system can't be left an ideal if a whole process is dependent on it.
2. Resistance to adoption of Salesforce system because initial cost to build new system and replacing existing system.
3. Data Privacy because of multiple users operating the system.
4. Easy to learn which can bring competitive advantage.

### **Opportunities:**

1. As real-time data is obtained, the relationship can be built which enables users to predict market requirement and change system according to nature of the market.
2. Leads can be converted to sale easily because system has already prepared organization about customer requirement.
3. The big market can be created around this system because transportation, storage management can be done easily.

### **Threat:**

1. Risk of losing data if system is not managed properly by end user.

## **Sales Process of Andhra Express:**

Initially the customer logged in to website portal created by Salesforce; automatically Customer\_ID is generated attached for that customer, then the list of food items that is food menu, prepared by vendors of Andhra Express is shown in the form on drop down list. After easy search different quantity of food the customer can selects.

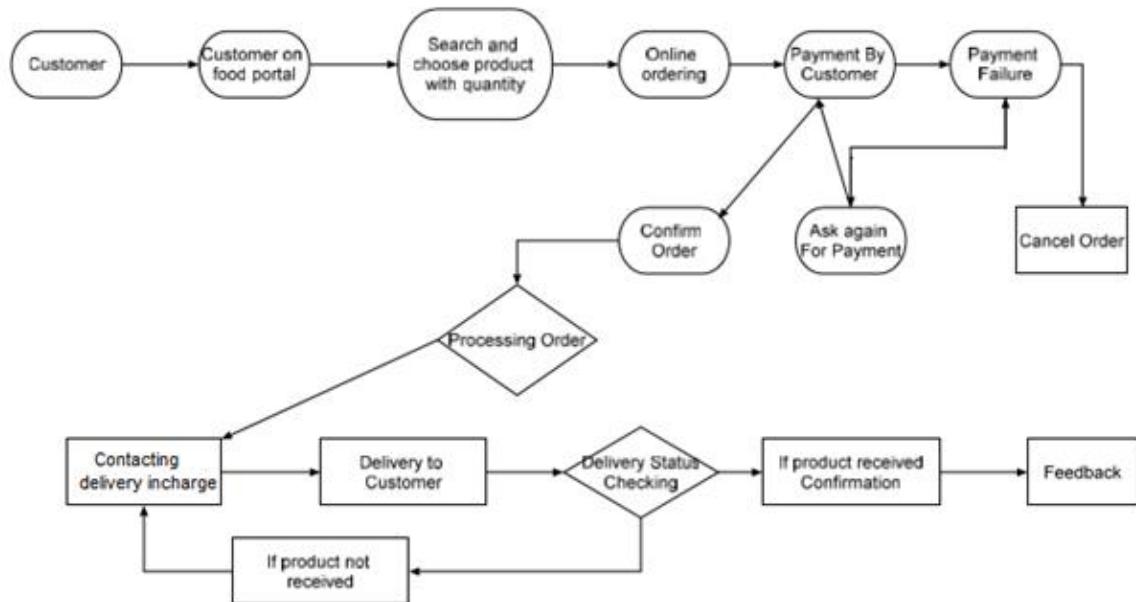
After choice of food, Food\_ID is auto generated for system use, the payment option is shown on the screen, according to which the customer can selects convenient mode of payment. After going into payment section, if payment procedure is followed properly, the Customer\_ID, Food\_ID, Payment\_ID, gets reflected in account section of Salesforce. If the user approves it then order is processed and Order\_ID is generated.

Until order is processed delivery department works to get ready for delivery of order to avoid last minute chaos. The payment has to be done on delivery which customer selects as mode of payment, Delivery\_ID is taken in reference by Salesforce, then delivery person is informed about it to receive payment and it's updated in system. During the time of delivery, system status is shown as pending.

And when the customer confirms the delivery the Delivery\_ID is matched with Food\_ID of customer's Customer\_ID and the customer is asked about confirmation of delivery. Once the delivery of food is done, the customer is asked to give the feedback.

Salesforce treats organization/owner/ manager as an Account. After implementation of sales the report and the dashboard is generated providing the details of sales to the owner of the organization Mr. Avinash Reddy. The customer who browse the website but have not purchased any foods products are considered leads by Salesforce system.

### Process Flow Diagram:



### Dashboard and Reporting/Analytical Requirement:

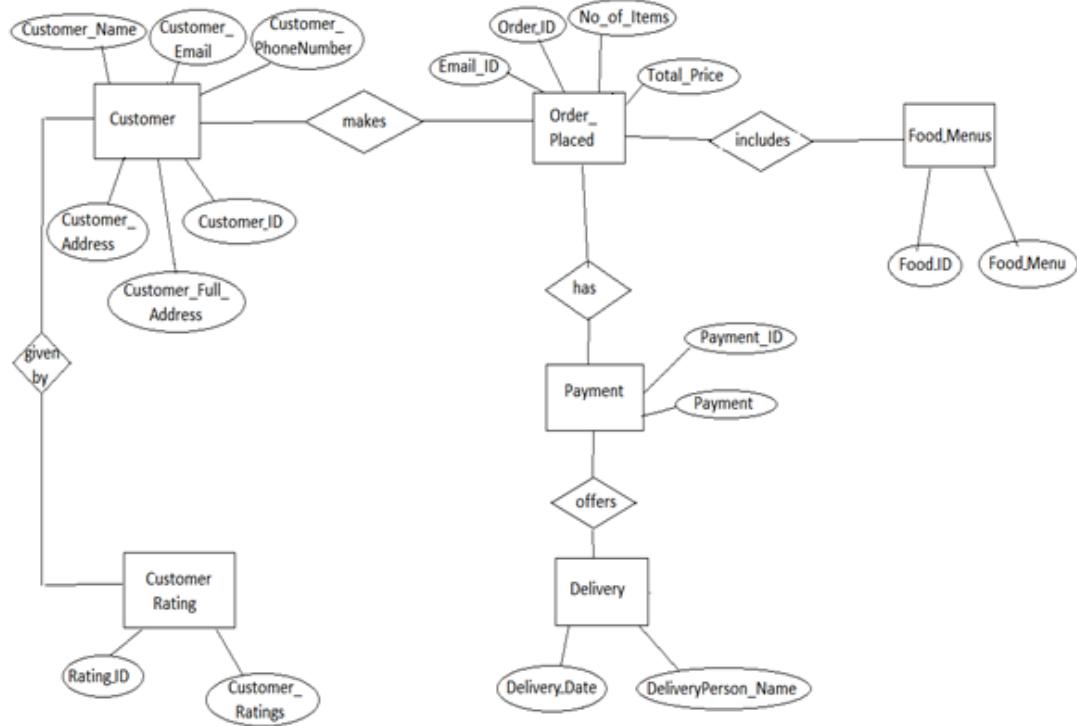
The prime purpose of implementing this project on this platform is that it should provide a way for the higher authorities or the person on the managerial level so that it has all the summarized data in forms of reports so that crucial business related decisions can be made so as to increase the profitability or to analyze and improve the lacking sectors of the business. Even though various reporting and visualization tools are available, we will be doing it in Salesforce all the back-end working is being managed on it.

The reports that are going to be generated will be visualized using the dashboard.

Following 4 reports were created to answer the BI queries and all these created reports were into one single dashboard:

1. CustomerReport
2. PaymentReport.
3. DeliveryReport
4. ReportRating

## Entity Relationship:



\*In Order\_Placed entity we have used Email\_ID for the purpose of order confirmation.\*

For this project the following entities are considered

- Customer
- Order\_Placed
- Food\_Menus
- Payment
- Delivery
- Customer\_Ratings

In customer entity all data is mentioned related to the customer like name, location, contact, Orders entity consist of the data about quantity of product, food menu consist of price, name, Payment entity simply consist of payment section, payment method, Feedback entity consist of reviews, rating, customer name, Delivery entity consist of order number, name of person to whom product is delivered.

The table below explains the attributes & data types assigned to different entities.

Entity	Attributes	Data Type
Customer	Customer_Name	Text
	Customer_ID	Auto Number
	Customer_Full_Address	Text
	Customer_Address	Text
	Customer_Email	Text
	Customer_PhoneNumber	Number

Order_Placed	Order_ID	Auto Number
	Email_ID	Text
	No_Of_Items	Number
	Total_Price	Currency
Food_Menus	Food_ID	Auto Number
	Food_Menu	Text
Payment	Payment_ID	Auto Number
	Payment	Picklist
Customer_Ratings	Rating_ID	Auto Number
	Customer_Ratings	Picklist
Delivery	DeliveryPerson_Name	Text
	Delivery_Date	Date

## Implementation:

### Objects:

Various objects have been created to store multiple data forms to create a linear simplified database which can help end user to provide reliable service to clients. Then later all created objects are related to each other to build a proper structured database model.

### Customers:

The screenshot shows the Salesforce interface for the 'Customers' object. The top navigation bar includes links for Home, Organisations, Contacts, Products, Price Books, Opportunities, Customers (which is highlighted in red), Food\_Menus, Orders, Payments, Deliveries, and Customer\_Ratings. A search bar and a 'Create New...' button are also visible. The main content area displays a list titled 'Recent Customers' with a table containing the following data:

Customer_ID
A-1020
A-1019
A-1018
A-1017
A-1016
A-1015
A-1014
A-1004
A-1013
A-1012

Below the table, there is a link 'Show 25 items'.

The displayed screenshot shows object customer. The object Customer stores information of all the customer who have placed orders on the registered portal under attributes Customer\_ID and data type assigned to Customer\_ID are auto generated number. The customer objects fields on portal required where customer enter his personal data which is shown below.

**Customer Edit**

**New Customer**

**Information**

Customer\_Name

Customer\_Address  --None--

Customer\_Email

Customer\_PhoneNumber

Customer\_Full\_Address

Owner RANU PARATE

Save Save & New Cancel

**Recent Items**

- American International Group
- A-4027
- A-5028
- A-10030
- A-2038
- A-1035
- Vamsy Sykam
- A-4026
- A-5027
- A-10029

Recycle Bin

Customer object is designed in such way that it has fields to stores all necessary information of customer, like name, address, contact no, email id, full address.

### Customer Fields:

**Customer**

**A-1020**

**Customer Detail**

Customer\_ID A-1020

Customer\_Name Chetan Reddy

Customer\_ID 1020

Customer\_Address Indiranagar

Customer\_Email janvi4444@gmail.com

Customer\_PhoneNumber 9663302049

Customer\_Full\_Address 80 Feet Road, Indiranagar, Bangalore 560078

Created By RANU PARATE, 15/12/2018 13:05

Last Modified By RANU PARATE, 15/12/2018 13:05

Edit Delete Clone

**Recent Items**

- A-1020
- RANU PARATE
- A-1019
- A-1018
- LogoAndhraExpress
- A-10014
- A-2021
- A-1017
- A-4011

Recycle Bin

As soon as customer fills all his details Customer\_ID is auto generated and attach to the data filled by customer which reflects in the system.

## **Food\_Menus:**

The screenshot shows the Salesforce interface for the 'Food\_Menus' object. At the top, there's a navigation bar with links for Home, Organisations, Contacts, Products, Price Books, Opportunities, Customers, Food\_Menus (which is highlighted in blue), Orders, Payments, Deliveries, Customer\_Ratings, and a '+' button. Below the navigation bar is a search bar with a 'Search' button. On the left, there's a sidebar titled 'Recent Items' containing a list of recent users and objects, such as Chetan Reddy, A-4012, A-5013, A-10015, A-2022, A-1020, RANU PARATE, A-1019, and A-1018. There's also a 'Recycle Bin' section. The main content area is titled 'Recent Food\_Menus' and shows a list of Food\_ID values: A-2022, A-2021, A-2020, A-2018, A-2019, A-2016, A-2017, A-2015, and A-2014. A 'New' button is located at the top right of this list. The bottom of the page includes a copyright notice: 'Copyright © 2000-2018 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance | Go to Salesforce mobile app'.

In this object, the information regarding different types of food selected by the customer is stored, and the Food\_ID is auto generated which is assigned to customer who selected food from menu. The food menu is showed in form of picklist as shown below in food menu object field.

The screenshot shows the Food\_Menu Edit page in Salesforce. On the left, there's a sidebar with 'Recent Items' containing links to various food menu entries like A-1020, RANU PARATE, etc. The main area has a title 'Food\_menu Edit' and a sub-section 'Food\_menu Edit'. It features two dropdown-like lists: 'Available' on the left and 'Chosen' on the right. The 'Available' list contains items such as 'Andra's Style Chicken Biryani 10 EUR', 'Chinese Combo 12 EUR', 'Dal Khichadi 9 EUR', 'North Indian Combo 13 EUR', 'Veg Fried Rice 10 EUR', and 'Masala Dosa 7 EUR'. The 'Chosen' list contains 'Carrier Meals 15 EUR' and 'Kheer 5 EUR'. Below these lists is a 'Customer' field with 'A-1020' selected. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons. The top navigation bar includes Home, Organisations, Contacts, Products, Price Books, Opportunities, Customers, Food\_Menus, Orders, Payments, Deliveries, Customer\_Ratings, and a 'Content' button.

The screenshot shows the food items which are selected from the drop down list are moved in Chosen column with respect to Customer\_ID. After clicking on save option the Food\_Menus field is created as shown. Different food item shown has different price list which than connects to payment section.

### **Food\_Menus fields:**

Food\_Menus object shows food selected by customer having attributes like Food\_ID which is auto Number & Food\_Menus selected by the customer, synchronised with Customer\_ID.

The screenshot shows the Food\_Menu Detail page for a record with Food\_ID A-2049. The top navigation bar is identical to the previous screenshot. The main area displays the 'Food\_menu Detail' section with fields: Food\_ID (A-2049), Food\_Menu (Dal Khichadi 9 EUR; Veg Fried Rice 10 EUR), Customer (A-1046), Created By (RANU PARATE, 15/12/2018 19:03), and Last Modified By (RANU PARATE, 15/12/2018 19:03). Below this are 'Edit', 'Delete', and 'Clone' buttons. At the bottom, there's an 'Open Activities' section with 'New Task' and 'New Event' buttons. The sidebar on the left shows recent items including A-2049, A-1046, Pooja Kamath, A-4039, A-4038, A-5040, A-10042, A-2050, A-1047, and A-5039.

## Orders:

The screenshot shows the Salesforce Orders page. At the top, there's a navigation bar with links for Home, Organisations, Contacts, Products, Price Books, Opportunities, Customers, Food\_Menus, Orders (which is the active tab), Payments, Deliveries, Customer\_Ratings, and a plus sign. Below the navigation is a search bar with a 'Search' button and a 'Create New...' button. The main content area is titled 'Orders Home' and shows a 'Recent Orders' section. This section has a 'New' button and a list of Order\_IDs: A-10015, A-10014, A-10013, A-10012, A-10011, A-10010, A-10009, A-10008, and A-10007. To the left of this list is a 'Recent Items' sidebar with icons for Chetan Reddy, Chetan Reddy, A-4012, A-5013, A-10015, A-2022, A-1020, RANU PARATE, A-1019, and A-1018. At the bottom of the page is a footer with copyright information: Copyright © 2000-2018 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance | Go to Salesforce mobile app.

The displayed screenshot shows object name, Orders. Under this Order\_ID is generated automatically having datatype auto number when details like number of items having data type number, Total\_Price by default calculates price of all foods selected by customer.

The screenshot shows the Salesforce Order\_Placed Edit page. At the top, there's a navigation bar with links for Home, Organisations, Contacts, Products, Price Books, Opportunities, Customers, Food\_Menus, Orders (active), Payments, Deliveries, Customer\_Ratings, and a plus sign. Below the navigation is a search bar with a 'Search' button and a 'Create New...' button. The main content area is titled 'Order\_Placed Edit' and shows a 'New Order\_Placed' section. This section has a 'Save', 'Save & New', and 'Cancel' button. Below these buttons is a 'Information' section with fields: Number\_Of\_Items (input field), Date of order (input field with value 15/12/2018), Food\_menu (input field), Email\_ID (input field), and Total\_Price (input field). To the left of this information section is a 'Recent Items' sidebar with icons for A-1020, RANU PARATE, A-1019, A-1018, LogoAndhraExpress, A-10014, A-2021, A-1017, and A-4011. At the bottom of the page is a footer with copyright information: Copyright © 2000-2018 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance | Go to Salesforce mobile app.

## Orders\_Placed Fields:

The screenshot shows the Salesforce interface for the Order\_Placed object. The top navigation bar includes Home, Organisations, Contacts, Products, Price Books, Opportunities, Customers, Food\_Menus, Orders, Payments, Deliveries, Customer\_Ratings, and a Content tab. On the left, a sidebar lists recent items such as A-10015, A-2022, A-1020, RANU PARATE, A-1019, A-1018, LogoAndhraExpress, A-10014, and A-2021. The main content area displays the Order\_Placed detail for record A-10015. The detail view includes fields for Order\_ID, Number\_of\_Items, Date of order, Food\_menu, Email\_ID, and Total\_Price. The record is owned by RANU PARATE.

The fields generated in Order object are shown in the above screenshot, all attributes of customer with Order\_ID is attached to it. Various fields like Number\_of\_Items, Email\_ID, Date of order by default datatype is Date is shown, after entering all data and saving data in object. Order\_Placed fields are created as per diagram above under section of object of Orders. It shows all related data of customer with attributes of Food\_Menus, Email\_ID from different entity this helps user for cross checking and maintaining database.

On Email\_ID the concerned person is contacted through email as shown below that required order is placed successfully with same Order\_ID generated through system. The mail is successfully triggered by system.

The screenshot shows a Gmail inbox with 1,996 messages. An email from RANU PARATE is selected, with the subject 'Order placed successfully' and a timestamp of 1:17 PM (8 minutes ago). The email body reads: 'Dear Customer, Your order has been placed successfully. Your order ID is : A-10015 Thank you for choosing Andhra Express.' Below the email are 'Reply' and 'Forward' buttons.

## Payments:

The screenshot shows the Salesforce Payments Home page. The top navigation bar includes links for Home, Organisations, Contacts, Products, Price Books, Opportunities, Customers, Food\_Menus, Orders, Payments (which is highlighted in brown), Deliveries, Customer\_Ratings, and a plus sign. On the left, there's a sidebar with a 'Create New...' button and a 'Recent Items' section containing icons for Chetan Reddy, A-4012, A-5013, A-10015, A-2022, A-1020, RANU PARATE, A-1019, and A-1018. Below this is a 'Recycle Bin' button. The main content area is titled 'Payments Home' and shows a 'Recent Payments' list with items: A-5013, A-5012, A-5011, A-5010, A-5009, A-5008, and A-5007. At the bottom, there's a copyright notice: Copyright © 2000-2018 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance | Go to Salesforce mobile app.

The payment object is created which has payment details of customer ordering the food from food menu. The payment details is classified under attribute Payment\_ID which is auto number and generated after choosing mode of payment and doing payment.

The screenshot shows the Salesforce Payment Edit page. The top navigation bar is identical to the previous screenshot. The sidebar on the left shows recent items including A-10015, A-2022, A-1020, RANU PARATE, A-1019, A-1018, LogoAndhraExpress, A-10014, and A-2021. The main content area is titled 'Payment Edit' and shows a 'New Payment' screen. It has three tabs: 'Information' (selected), 'Billing', and 'Shipping'. Under 'Information', there are fields for Food\_Price (with a red asterisk indicating it's required), Order (set to A-10015), and Payment (set to --None--). There are also 'Save', 'Save & New', and 'Cancel' buttons. A note at the top right says 'Required Information'.

The above screenshot shows payment fields Food\_Price datatype as number, Payment fields is picklist type where mode of payment is selected it is directly is connected to Order\_ID after saving the entered data the payment field object created as shown below.

## Payment Object Fields:

The screenshot shows the Salesforce interface for the Payments object. The top navigation bar includes links for Home, Organisations, Contacts, Products, Price Books, Opportunities, Customers, Food\_Menus, Orders, Payments (which is highlighted in yellow), Deliveries, Customer\_Ratings, and a plus sign. The main content area displays a record for a Payment object with ID A-5013. The record details are as follows:

- Payment Detail:**
  - Payment\_ID: A-5013
  - Food\_Price: €20
  - Order: A-10015
  - Payment: COD
  - Created By: RANU PARATE, 15/12/2018 13:19
  - Last Modified By: RANU PARATE, 15/12/2018 13:19
- Recent Items:** A sidebar listing recent items including A-5013, A-10015, A-2022, A-1020, RANU PARATE, A-1019, A-1018, LogoAndhraExpress, and A-10014.

The Payment object field created generates Payment\_ID which gets attached to Order\_ID to maintain linear flow. The Food\_Price is sum of all price of food ordered of different quantity. As above example show mode of payment cash on delivery (COD) which is passed on to delivery department.

## Delivery:

The screenshot shows the Salesforce interface for the Deliveries object. The top navigation bar includes links for Home, Organisations, Contacts, Products, Price Books, Opportunities, Customers, Food\_Menus, Orders, Payments, Deliveries (which is highlighted in yellow), Customer\_Ratings, and a plus sign. The main content area displays a list of recent deliveries:

Delivery_ID
A-4012
A-4011
A-4010
A-4009
A-4008
A-4007
A-4006

The sidebar on the left shows recent items including Chetan Reddy, Chetan Reddy, A-4012, A-5013, A-10015, A-2022, A-1020, RANU PARATE, A-1019, and A-1018. There is also a Recycle Bin button.

The object delivery is created where delivery detail of receiver is stored under attributes of Delivery\_ID. The Delivery\_ID is auto generated with data type auto number depends upon mode of payment sometimes it's created before delivery if payment is done online and if payment is done COD then data gets entered. The deliveries field is shown below where appropriate data is entered.

The screenshot shows the Salesforce classic interface. The top navigation bar includes links for Home, Organisations, Contacts, Products, Price Books, Opportunities, Customers, Food\_Menus, Orders, Payments, Deliveries (which is highlighted in yellow), Customer\_Ratings, and a plus sign. Below the navigation is a search bar with a 'Search' button. The main content area is titled 'Delivery Edit' with a sub-section 'New Delivery'. It contains fields for 'DeliveryPerson\_Name' (A-5013), 'Delivery\_Date' (15/12/2018 13:19), and 'Payment' (A-5013). A note indicates that the payment field is required. The 'Owner' is listed as 'RANU PARATE'. At the bottom of the form are 'Save', 'Save & New', and 'Cancel' buttons. To the left of the main content is a sidebar with a 'Recent Items' section containing links to various objects like A-5013, A-10015, etc., and a 'Recycle Bin' section.

Deliveries objects consist of fields such as DeliveryPerson\_Name where person who is delivering product name is mentioned and on date which product is delivered is entered in Delivery\_Date field. Payment\_ID is reflected by default, which means Payment object is connected to Deliveries object. After saving the data which is entered in related field Deliveries object is created with following information shown in below image.

### Delivery Object Field:

The screenshot shows the Salesforce classic interface. The top navigation bar includes links for Home, Organisations, Contacts, Products, Price Books, Opportunities, Customers, Food\_Menus, Orders, Payments, Deliveries (highlighted in yellow), Customer\_Ratings, and a plus sign. Below the navigation is a search bar with a 'Search' button. The main content area is titled 'Delivery Detail' with a sub-section 'A-4012'. It contains fields for 'Delivery\_ID' (A-4012), 'DeliveryPerson\_Name' (Rohan Kumar), 'Delivery\_Date' (15/12/2018 13:19), 'Payment' (A-5013), and 'Created By' (RANU PARATE, 15/12/2018 13:21). There are 'Edit', 'Delete', and 'Clone' buttons at the bottom. To the left of the main content is a sidebar with a 'Recent Items' section containing links to various objects like A-4012, A-5013, etc.

Delivery object field consist of auto generated Delivery\_ID auto number data type assigned as code to delivery details to customer with person name delivering product at particular date.

### **Customer\_Ratings:**

Customer_Name
Pooja Kamath
Satwik R
Adilhwarji
Kanna Ravi
Monisha Ramesh
Vikram Bhat
Smriti Reddy
Bhargavi K
Rehman
Sunil Kumar
American International Group
Vamsi Sykam
Keerthi MJ
Amazon
Infosys
Yaseer Mohammed
Cognizant
Tarun Kumar
American International Group

Object Customer\_Ratings is reviewing object where the feedback given by the customer is stored regarding product delivered under section Customer\_Ratings which connects with Customer details for business use. These object having fields are shown in below screenshot

Customer_Name	<input type="text"/>	Owner	RANU PARATE
Customer_Ratings	--None--	= Required Information	
Delivery	A-4012	<input type="button" value="Save"/> <input type="button" value="Save &amp; New"/> <input type="button" value="Cancel"/>	

The Customer\_Ratings consist of fields Customer\_Name as text data type, Customer\_Ratings as numeric data type from 1 to 5; 1 is for worst food and 5 is for good food and Delivery\_ID is automatically assigned to customer ratings. After completion of data entry in field we get Rating\_ID.

### **Customer\_Ratings Object field:**

The screenshot shows the Customer\_Ratings object detail page. At the top, there's a navigation bar with links for Home, Organisations, Contacts, Products, Price Books, Opportunities, Customers, Food\_Menus, Orders, Payments, Deliveries, Customer\_Ratings (which is highlighted in blue), Dashboards, Reports, and a plus sign. Below the navigation is a toolbar with 'Create New...' and a dropdown arrow, followed by a recent items list containing records A-1003, A-5039, A-10041, A-2049, A-1046, A-4039, A-4038, A-5040, and A-10042. The main content area displays a record for 'Customer\_Rating Detail' for 'Pooja Kamath'. The record includes fields: Customer\_Name (Pooja Kamath), Rating\_ID (50026), Customer\_Ratings (3), Delivery (A-4039), Created By (RANU PARATE, 15/12/2018 19:14), and Last Modified By (RANU PARATE, 15/12/2018 19:14). Below the record are edit, delete, and clone buttons. To the right, the owner is listed as RANU PARATE [Change]. Below the record, there are sections for 'Open Activities' (with 'New Task' and 'New Event' buttons) and 'Activity History' (with 'Log a Call', 'Mail Merge', and 'Send an Email' buttons). Both sections show 'No records to display'. At the bottom, there are links for 'Back To Top' and 'Always show me fewer ▲ / more ▼ records per related list'.

The above screenshot shows object created consist of Customer\_Name, system generated auto number Rating\_ID connected to Delivery\_ID and ratings given by customer in form of numbers.

### **Validation Rule:**

Its simple pre-set of defined function which is used to check the accuracy of details entered by user by exception error handling method which benefits user to validate the page with proper guidelines.

### **Validation Rule for Customer:**

To detect error in initial phase and make accurate interactive platform we have created some function as form of validation rule for different objects. Validation rule for Customer object is shown below in diagram.

Customer Edit  
New Customer Help for this Page ?

**Customer Edit** Save Save & New Cancel

**Error: Invalid Data.**  
Review all error messages below to correct your data.

**Information** |= Required Information

Customer_Name	Akanksha	Owner	RANU PARATE
Customer_Address	--None--	Error: You must enter a value	
Customer_Email	akanksha45@gmail.com		
Customer_PhoneNumber	9887650987		
Customer_Full_Address	11th main street, Jayanagar, Bangalore 560089		

Save Save & New Cancel

In above screenshot the customer has not filled Customer\_Address field which has thrown error, in form of pop up message which refrains user to move to next page until the customer enters all data. This is process of checking validation of Customer object.

### Validation Rule for Food\_Menus:

For Food\_Menu object validation rule is clearly set with function that states if the customer does not select any food items error is thrown this is shown by below screenshot

Food\_menu Edit  
New Food\_menu Help for this Page ?

**Food\_menu Edit** Save Save & New Cancel

**Error: Invalid Data.**  
Review all error messages below to correct your data.

**Information** |= Required Information

Food_Menu	Error: You must enter a value	Owner	RANU PARATE
Available	Andra's Style Chicken Biryani 10 EUR Carrier Meals 15 EUR Chinese Combo 12 EUR Dal Khichadi 9 EUR Kheer 5 EUR North Indian Combo 13 EUR	Chosen	<span style="border: 1px solid red; padding: 2px;">&gt;</span> <span style="border: 1px solid red; padding: 2px;">&lt;</span>
Customer	A-1048		

Save Save & New Cancel

As seen from above illustrated figure the error message pop up at top which clearly state that the customer need to select one of values from pick list to proceed to next step.

### Validation Rule for Order\_Placed:

Validation rule for Order\_Placed have number of fields which needs to be filled by the customer operating the platform like Number\_of\_Items, Date of order, Email\_ID, the process is same as like other objects mentioned above.



Order\_Placed Edit  
New Order\_Placed

Help for this Page [?](#)

Order_Placed Edit		Save	Save & New	Cancel																				
<b>Error: Invalid Data.</b> Review all error messages below to correct your data.																								
<b>Information</b> <div style="float: right;">  = Required Information</div> <table border="1"> <tr> <td>Number_Of_Items</td> <td><input type="text" value="1"/></td> <td>Owner</td> <td>RANU PARATE</td> </tr> <tr> <td>Date of order</td> <td><input type="text" value="01/12/2018"/> [ 16/12/2018 ]</td> <td colspan="2"></td> </tr> <tr> <td>Food_menu</td> <td><input type="text" value="A-2051"/></td> <td colspan="2"></td> </tr> <tr> <td>Email_ID</td> <td><input type="text"/></td> <td colspan="2">Error: You must enter a value</td> </tr> <tr> <td>Total_Price</td> <td><input type="text" value="9.00"/></td> <td colspan="2"></td> </tr> </table>					Number_Of_Items	<input type="text" value="1"/>	Owner	RANU PARATE	Date of order	<input type="text" value="01/12/2018"/> [ 16/12/2018 ]			Food_menu	<input type="text" value="A-2051"/>			Email_ID	<input type="text"/>	Error: You must enter a value		Total_Price	<input type="text" value="9.00"/>		
Number_Of_Items	<input type="text" value="1"/>	Owner	RANU PARATE																					
Date of order	<input type="text" value="01/12/2018"/> [ 16/12/2018 ]																							
Food_menu	<input type="text" value="A-2051"/>																							
Email_ID	<input type="text"/>	Error: You must enter a value																						
Total_Price	<input type="text" value="9.00"/>																							
<input type="button" value="Save"/> <input type="button" value="Save &amp; New"/> <input type="button" value="Cancel"/>																								

From above screenshot it is shown that the customer has got error message of invalid data and asked to correct the data, because Email\_ID field is left blank.

### Validation Rule for Payment:

Only two fields required in Payment object required detail filling one Food\_Price and next Payment fields to avoid error message and ensure user the appropriate functioning of the payment page.



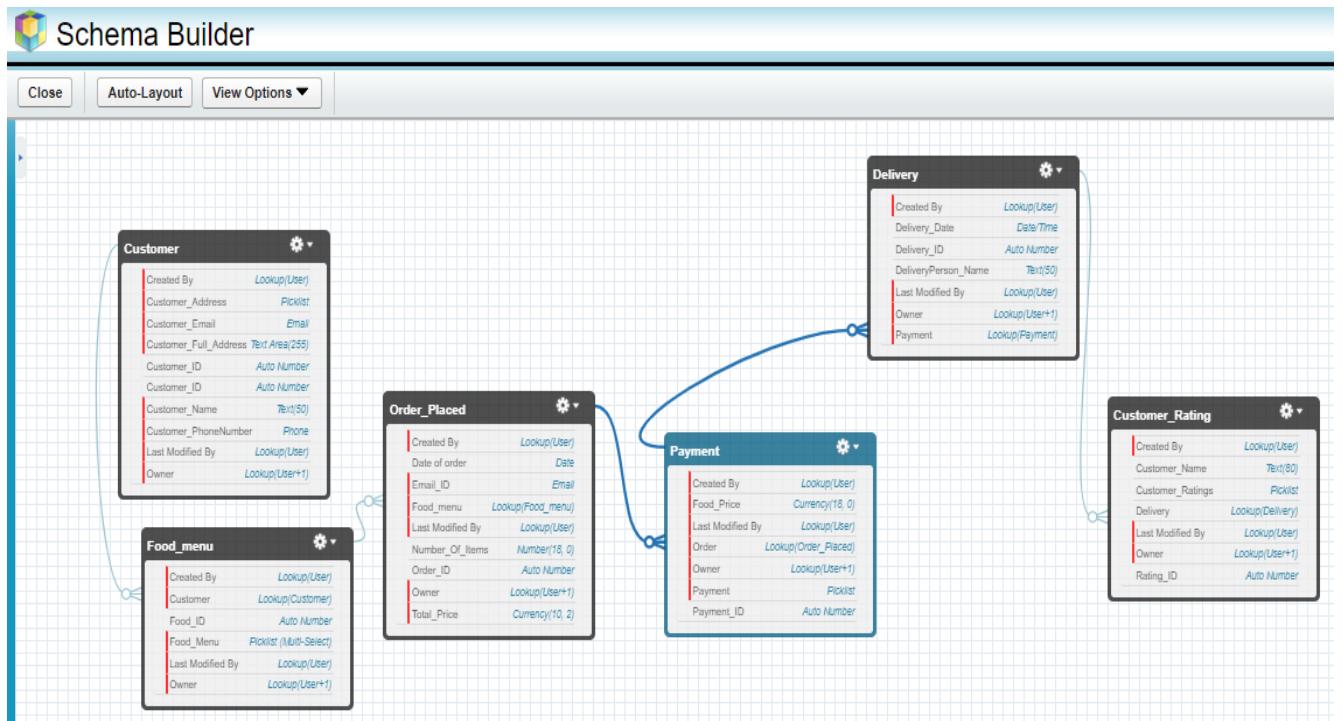
Payment Edit  
New Payment

Help for this Page [?](#)

Payment Edit		Save	Save & New	Cancel												
<b>Error: Invalid Data.</b> Review all error messages below to correct your data.																
<b>Information</b> <div style="float: right;">  = Required Information</div> <table border="1"> <tr> <td>Food_Price</td> <td><input type="text" value="0"/></td> <td>Owner</td> <td>RANU PARATE</td> </tr> <tr> <td>Order</td> <td><input type="text" value="A-10043"/></td> <td colspan="2"></td> </tr> <tr> <td>Payment</td> <td><input type="text" value="--None--"/></td> <td colspan="2">Error: You must enter a value</td> </tr> </table>					Food_Price	<input type="text" value="0"/>	Owner	RANU PARATE	Order	<input type="text" value="A-10043"/>			Payment	<input type="text" value="--None--"/>	Error: You must enter a value	
Food_Price	<input type="text" value="0"/>	Owner	RANU PARATE													
Order	<input type="text" value="A-10043"/>															
Payment	<input type="text" value="--None--"/>	Error: You must enter a value														
<input type="button" value="Save"/> <input type="button" value="Save &amp; New"/> <input type="button" value="Cancel"/>																

The above screenshot shows the error message which occurred due to payment option left blank by the customer. After entering the desired option the customer can move to final process.

## Schema in Schema Builder:



The above screenshot demonstrates the objects that are created as per the requirement of the organization functionality are linked to each other. These objects form the base of the organization and it is necessary to be managed. All the build-up and management of relationships for the various objects that are created for the organization is done with the help of Schema Builder using the keys which are present inside each object. All these tasks are handled by an expert of Salesforce in an organization.

In our CRM implementation of required 6 objects are organized in a manner so that it demonstrates the business flow of our organization.

## Generating Email Alerts:

In this project implementation a process is setup to generate emails alerts at two crucial points of the business.

- 1) When a new customer registers with our company
- 2) When the customer orders food

This kind of e-mail notification signifies success at any of these points, that is, successful registration or successful order placing as an Invoice.

The screenshot below shows the email alerts created in this project.

## All Email Alerts

[Help for this Page](#)

Email alerts are the emails that workflow rules send when triggered.

View: [All Email Alerts](#) [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other

New Email Alert				
Action	Description	Email Template Name	Object	Last Modified Date
<a href="#">Edit</a>   <a href="#">Del</a>	cust	Email_Alert	Customer	14/12/2018
<a href="#">Edit</a>   <a href="#">Del</a>	Successfully_Order_Placed	Order_Placed	Order_Placed	14/12/2018

For creating email alerts, firstly the customizations of email template for both the emails that are used for the business are created. After that a workflow rule is created in which the workflow actions are created consisting of email alerts. The main step is to set it to active mode so that it could be activated for use.

Email Alert  
CUST [Printable View](#) | [Help for this Page](#)

[« Back to List: Email Alerts](#)

[Rules Using This Email Alert \[1\]](#) | [Approval Processes Using This Email Alert \[0\]](#)

Email Alert Detail		<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Clone</a>	Email Template	Email_Alert
Description	cust				Object	Customer
Unique Name	cust					
From Email Address	Current User's email address					
Recipients	Email Field: Customer_Email					
Additional Emails						
Created By	RANU PARATE, 14/12/2018 17:10				Modified By	RANU PARATE, 14/12/2018 17:10
		<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Clone</a>		

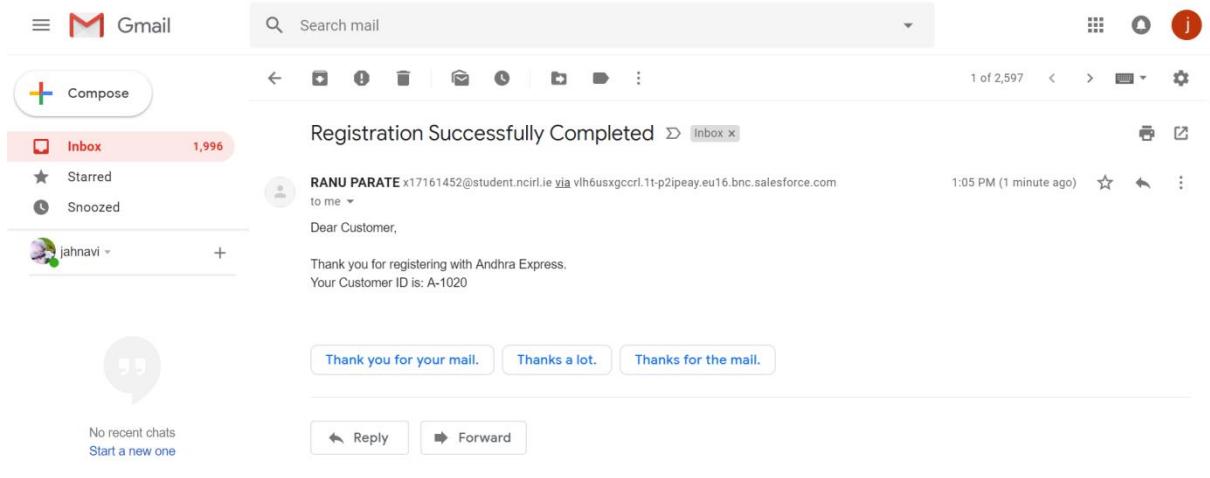
**Rules Using This Email Alert** [Rules Using This Email Alert Help](#)

Action	Rule Name	Description	Object	Active
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	CUST		Customer	<input checked="" type="checkbox"/>

**Approval Processes Using This Email Alert** [Approval Processes Using This Email Alert Help](#)

This alert is currently not used by any approval processes

This above screenshot is a more detail view of the email alert that is generated when a new customer do the registrations. The alert is set to active mode which means that it is in use. This email alert will be sent to the concerned customer with the respective customer ID. For testing purpose we have registered with one of our personal email ID so as to check the working status of the email alerts.



The above screenshot shows that the customer has received an email giving confirmation of successful registration with the organization and also has been allocated with a Customer ID which can be used for ordering purpose.

Email Alert  
Sucsessfully\_Order\_Placed

[Printable View](#) | [Help for this Page](#)

[« Back to List: Email Alerts](#)

[Rules Using This Email Alert \[1\]](#) | [Approval Processes Using This Email Alert \[0\]](#)

Email Alert Detail		<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Clone</a>	Email Template	Object
Description	Sucsessfully_Order_Placed				Order_Placed	
Unique Name	Sucsessfully_Order_Placed				Object	Order_Placed
From Email Address	Current User's email address					
Recipients	Email Field: Email_ID					
Additional Emails						
Created By	RANU PARATE, 14/12/2018 17:55				Modified By	RANU PARATE, 14/12/2018 17:55
		<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Clone</a>		

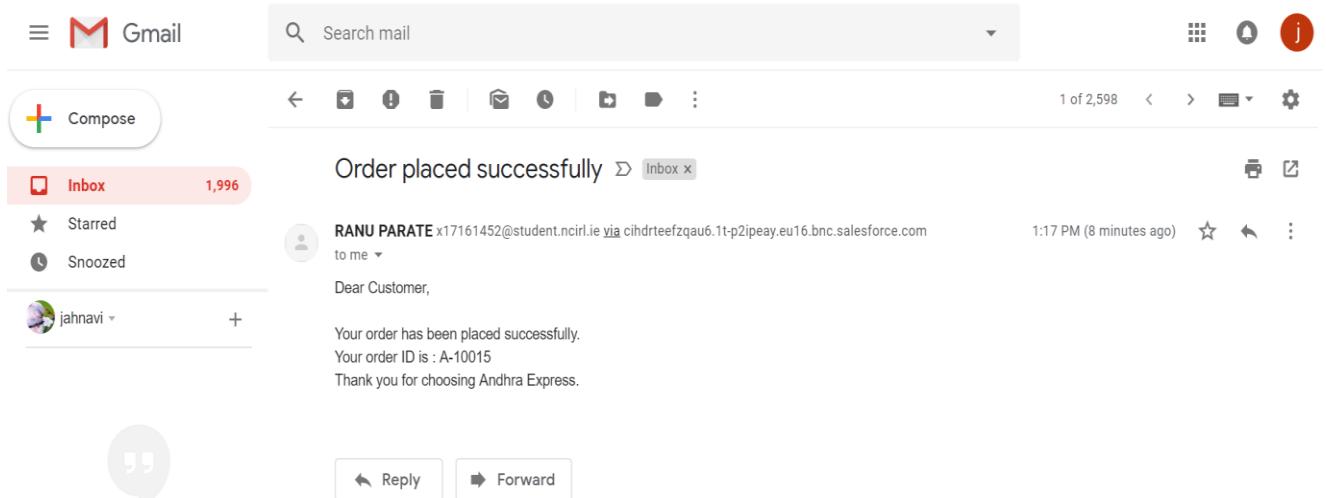
**Rules Using This Email Alert**

Action	Rule Name	Description	Object	Active
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Order_Placed		Order_Placed	<input checked="" type="checkbox"/>

**Approval Processes Using This Email Alert**

Approval Processes Using This Email Alert Help	
<a href="#">Approval Processes Using This Email Alert Help</a>	

The above screenshot gives the detailed insight for the mail generated when an order is placed by a respective customer. For a confirmation purpose an email is sent to that customer. Even this alert is set to active state it is in use. This mail is forwarded to the concerned customer.



The customer she will receive this type of email after placing the food order from the organization. It also consists of the order ID that is generated for the particular invoice.

## User Interface:

The organization is designed using custom features that are available in Visualforce. Apex is the programming language that is used to code the interface.

### Visualforce Pages

[Help for this Page](#)

Visualforce Pages provide a robust and easy to use mechanism to create new and exciting user experiences for your application or to enhance existing applications to optimize your users' productivity.

**View:** All ▾ [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other [All](#)

Action	Label	Name	Namespace Prefix	Api Version	Description	Created By Alias	Created Date	Last Modified By Alias	Last Modified Date
Edit   Del   Security	Payment	Payment		44.0		RPARA	16/12/2018 18:19	RPARA	16/12/2018 18:19
Edit   Del   Security	Food_Oder	Food_Oder		44.0		RPARA	16/12/2018 14:53	RPARA	16/12/2018 15:13
Edit   Del   Security	Customer	Customer		44.0		RPARA	14/12/2018 19:07	RPARA	14/12/2018 19:47

The below screenshot illustrated the logo saved in static resource in the salesforce

[Help for this Page](#)

**Static Resource Logo**

Static Resource Detail	
<a href="#">Edit</a>	<a href="#">Delete</a>
<a href="#">Where is this used?</a>	
Name	Logo
Namespace Prefix	
Description	
MIME Type	image/png
Cache Control	Public
Size	65,136 bytes
<a href="#">View file</a>	
Created By	RANU PARATE, 14/12/2018 19:44
Last Modified By	RANU PARATE, 14/12/2018 19:44

In the static resource page there is detail description about the inclusion of an image which signifies the logo of the company in form of a resource.

## 1) Customer Registration Page

Visualforce Page  
Customer

Help for this Page ?

Page Detail		<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Clone</a>	<a href="#">Where is this used?</a>	<a href="#">Show Dependencies</a>	<a href="#">Preview</a>
Label	Customer	Name	Customer				
Namespace Prefix		Available for Lightning Experience, Lightning Communities, and the mobile app	<input type="checkbox"/>				
Require CSRF protection on GET requests	<input type="checkbox"/>			Description			
Last Modified By	<a href="#">RANU PARATE</a> , 14/12/2018 19:07			Created By <a href="#">RANU PARATE</a> , 14/12/2018 19:07			
<a href="#">Visualforce Markup</a> <a href="#">Version Settings</a>							
<pre>&lt;apex:page standardController="Customer__c" showHeader="false"&gt;     &lt;div align ="Center"&gt;         &lt;apex:image value="{!!\$Resource.Logo}" /&gt;     &lt;/div&gt;      &lt;apex:form &gt;         &lt;apex:pageBlock title="Registration Form"&gt;             &lt;div align="Center"&gt;                 &lt;apex:outputText value="Please Enter Your Details" style="font-size:26px; color:blue; "/&gt;&lt;BR/&gt;             &lt;/div&gt;             &lt;apex:pageBlockSection showHeader="true" title="Personal Details" columns="1"&gt;                 &lt;apex:inputField value="{!! Customer__c.Customer_Name__c}" style="width:300px;height:20px;" Required="True"/&gt;                 &lt;apex:inputField value="{!! Customer__c.Customer_Email__c}" style="width:300px;height:20px;" Required="true"/&gt;                 &lt;apex:inputField value="{!! Customer__c.Customer_PhoneNumber__c}" style="width:300px;height:20px;" Required="true"/&gt;                 &lt;apex:inputField value="{!! Customer__c.Customer_Address__c}" style="width:300px;height:20px;" Required="True"/&gt;                 &lt;apex:inputField value="{!! Customer__c.Customer_Full_Address__c}" style="width:300px;height:20px;" Required="True"/&gt;             &lt;/apex:pageBlockSection&gt;             &lt;div align ="center"&gt;                 &lt;apex:commandButton value="Submit" action="!save"/&gt;             &lt;/div&gt;         &lt;/apex:pageBlock&gt;     &lt;/div&gt;</pre>							

The above screenshot shows the code used to create the registration form. The input fields are created as per the requirement and all the fields are kept mandatory so as to complete the registration.



Registration Form

Please Enter Your Details

▼ Personal Details

Customer_Name	<input type="text"/>
Customer_Email	<input type="text"/>
Customer_PhoneNumber	<input type="text"/>
Customer_Address	<input type="text"/> --None--
Customer_Full_Address	<input type="text"/>

[Submit](#)

The above screenshot shows the default webpage when it is loaded and the below screenshot shows the registration form when data is entered. If the customer tries to enter invalid data into the input and tries to complete the registration by clicking on submit button the error message will pop up with a validation requiring user to input the data as per the required pre-set validation standards.

Show apps

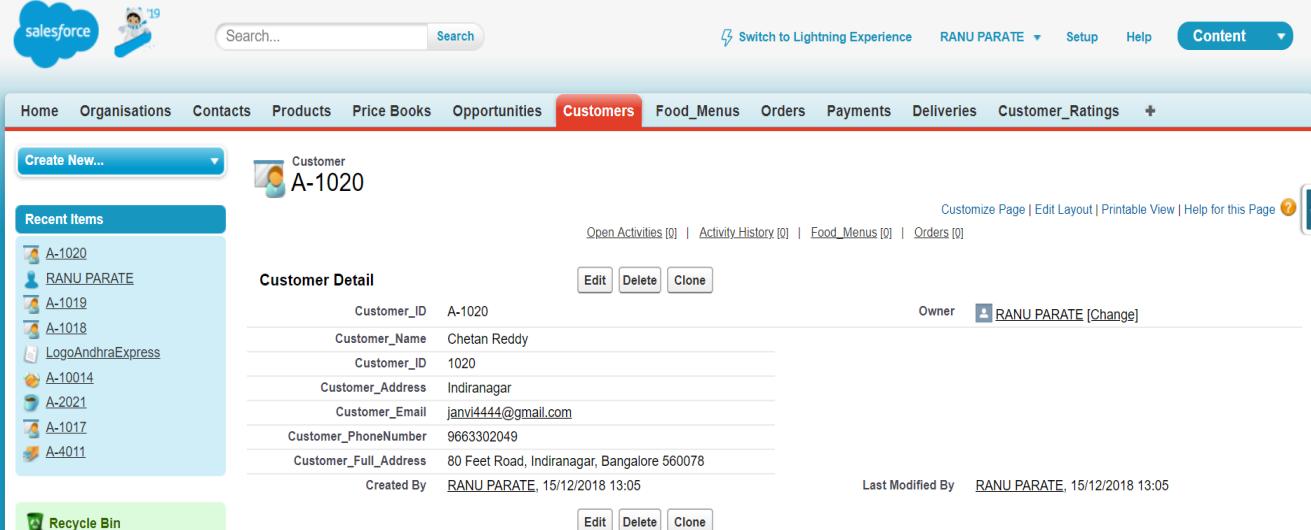


### Registration Form

Please Enter Your Details

**Personal Details**

Customer_Name	Chetan Reddy
Customer_Email	janvi4444@gmail.com
Customer_PhoneNumber	9663302049
Customer_Address	Indiranagar
Customer_Full_Address	80 Feet Road, Indiranagar, Bangalore 560078



The screenshot shows a Salesforce customer record for 'A-1020'. The record details are:

- Customer Detail:**
  - Customer\_ID: A-1020
  - Customer\_Name: Chetan Reddy
  - Customer\_ID: 1020
  - Customer\_Address: Indiranagar
  - Customer\_Email: janvi4444@gmail.com
  - Customer\_PhoneNumber: 9663302049
  - Customer\_Full\_Address: 80 Feet Road, Indiranagar, Bangalore 560078
- Owner:** RANU PARATE [Change]
- Created By:** RANU PARATE, 15/12/2018 13:05
- Last Modified By:** RANU PARATE, 15/12/2018 13:05

Buttons at the bottom include: Edit, Delete, Clone.

The above screenshot demonstrates the newly entered data i.e. the new customer details which are entered by the customer are stored in the background whereas for the means of confirmation the customer receives an email which also provides the unique Customer ID.

## 2) Food Ordering Page

Visualforce Page [Help for this Page](#)

**Food\_Oder**

**Page Detail**

[Edit](#) [Delete](#) [Clone](#) [Where is this used?](#) [Show Dependencies](#) [Preview](#)

Label	Food_Oder	Name	Food_Oder
Namespace Prefix		Available for Lightning Experience, Lightning Communities, and the mobile app	<input type="checkbox"/>
Require CSRF protection on GET requests	<input type="checkbox"/>	Description	
Last Modified By	RANU PARATE, 16/12/2018 15:13	Created By	RANU PARATE, 16/12/2018 14:53

**Visualforce Markup** [Version Settings](#)

```
<apex:page standardController="Food_menu__c" showHeader="false">
    <div align ="Center">
        <apex:image value="!$Resource.Logo" />
    </div>
    <apex:form>
        <apex:pageBlock title="Food Order Menu">
            <div align="Center">
                <apex:outputText value="Please Select the Food Items" style="font-size:26px; color:blue; "/><br/>
            </div>
            <apex:pageBlockSection showHeader="true" title="Menu" columns="1">
                <apex:inputField value="(! Food_menu__c.Food_Menu__c)" style="vertical-align:text-top; padding-right:50px;" Required="True"/>
            </apex:pageBlockSection>
            <div align ="center">
                <apex:commandButton value="Submit" action="!save"/>
            </div>
        </apex:pageBlock>
    </apex:form>
</apex:page>
```

The above screenshot of code is for creating the webpage for ordering the meal provided by the company. The theme of the interface is kept the same as that of the registration form.



The above screenshot shows the default screen that is loaded when a customer tends to order some meal .The customer can select multiple food items from the available section and add them to the chosen section.

The screenshot shows a food ordering interface for 'ANDHRA EXPRESS'. At the top, the restaurant's logo is displayed. Below it, a header bar reads 'Food Order Menu' and 'Please Select the Food Items'. A section titled 'Menu' contains two lists: 'Available' and 'Chosen'. The 'Available' list includes items like 'Carrier Meals 15 EUR', 'Chinese Combo 12 EUR', 'Dal Khichadi 9 EUR', 'North Indian Combo 13 EUR', 'Veg Fried Rice 10 EUR', and 'Masala Dosa 7 EUR'. The 'Chosen' list currently contains 'Andra's Style Chicken Biryani 10 EUR' and 'Kheer 5 EUR'. A 'Submit' button is located at the bottom right of the selection area.

In the above screenshot it is shown that two meals have been selected for demonstration purpose from the available meals.

This screenshot shows the same food ordering interface as the previous one, but with an error message. The 'Available' list is highlighted with a red border and displays the message 'Error: You must enter a value'. The 'Chosen' list is empty. The 'Submit' button is visible at the bottom.

The above screenshot shows that if the customer has not selected any of the food item than it will show the error and the customer will not be able to proceed.

### 3) Payment Page

The screenshot shows the food ordering interface again. The 'Payment' dropdown menu is open, showing the option '--None--'. A 'Submit' button is located at the bottom right of the payment section.

When the customer selects the meal the payment need to be done. The above screenshot shows the payment mode by which the customer can pay.



Food Order Menu

Please Select the Food Items

▼ Menu

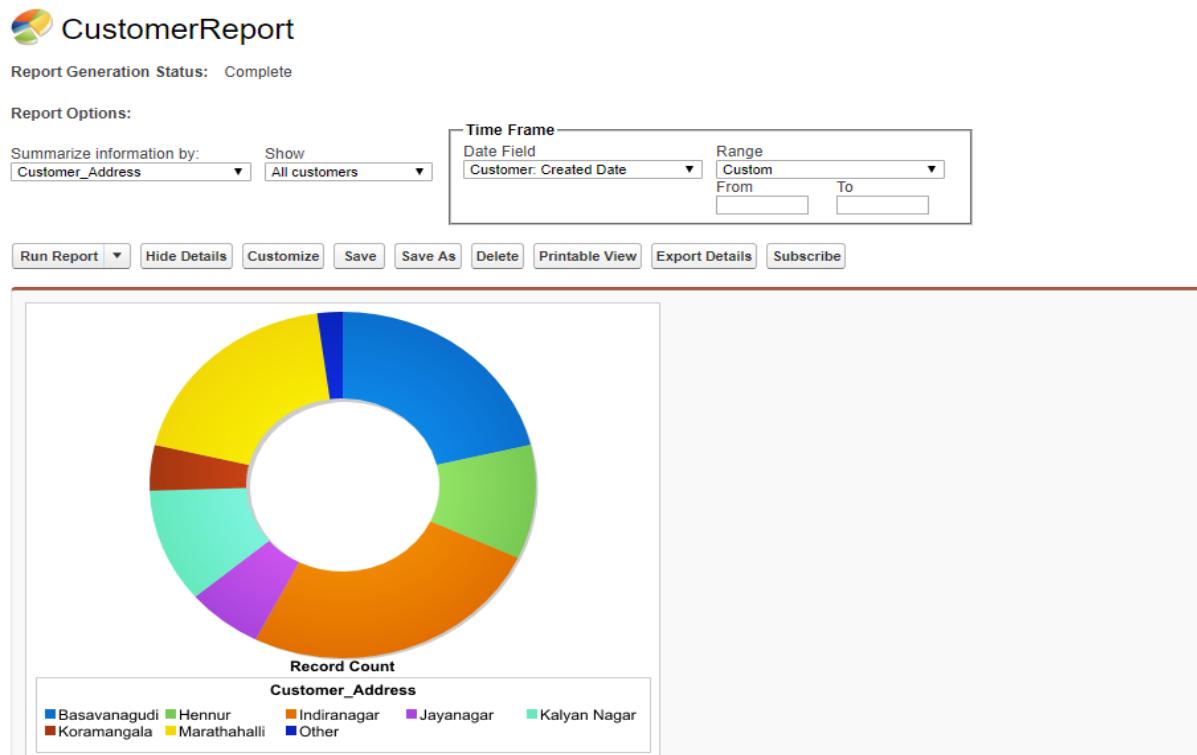
Payment | COD

Submit

The customer can select either of the method i.e. Cash of Delivery or Online payment.

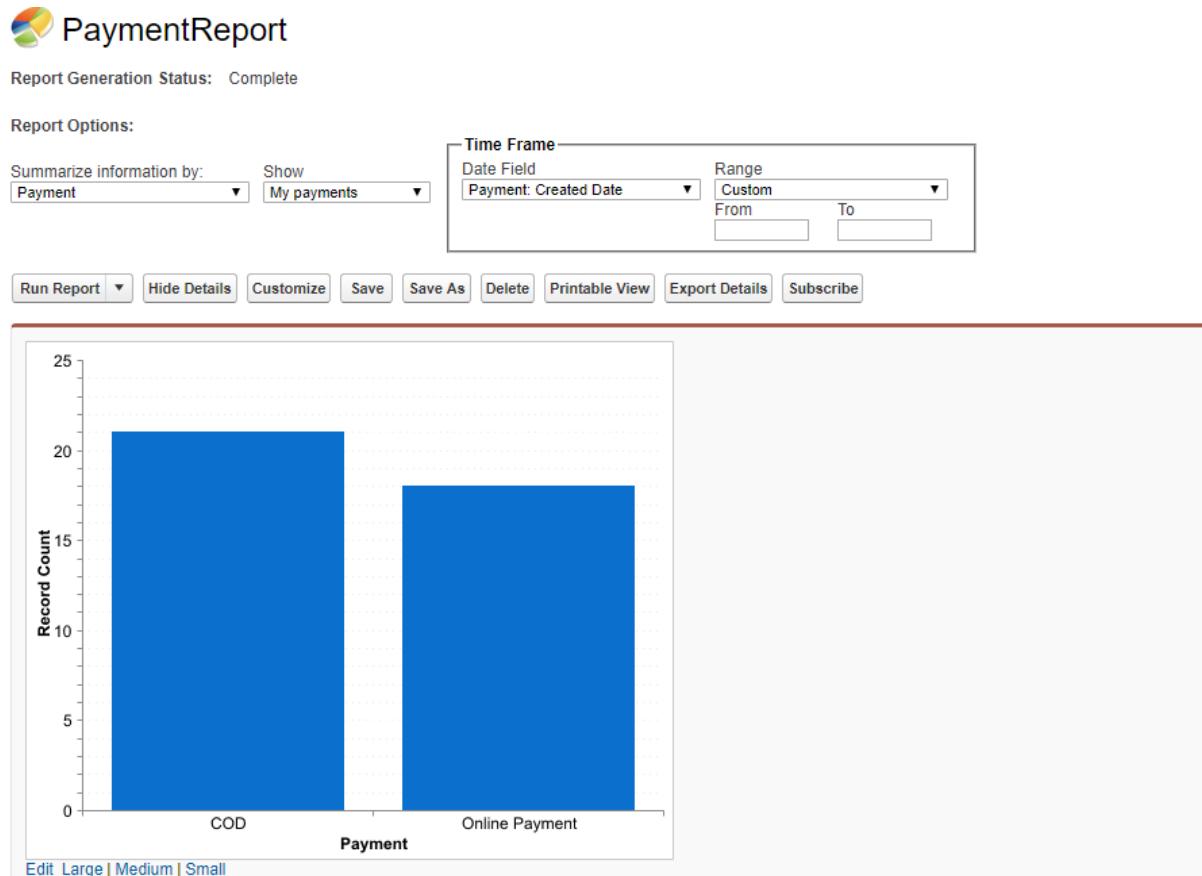
## Created Reports and Dashboard

### 1) CustomerReport



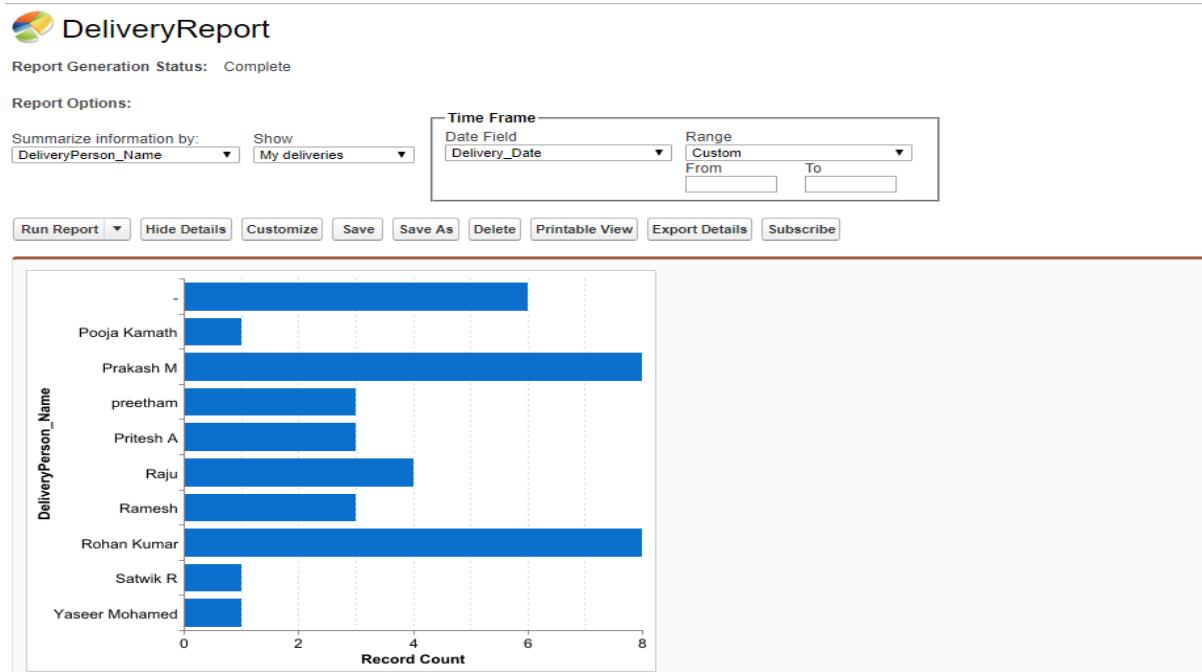
From the first report created the sales are demonstrated which have been made across different location. According to the above chart, Indiranagar leads all other location in terms of sales which is closely followed by Basavanagudi and Marathahalli. Koramangala and other location have the least number of orders. The reason for lower sales in these locations needs to be addressed so as to improve the sales margin of the organization and one such solution for increasing the sales in these areas can be by promoting about the services provided by the company so that it could come under public notice.

## 2) PaymentReport



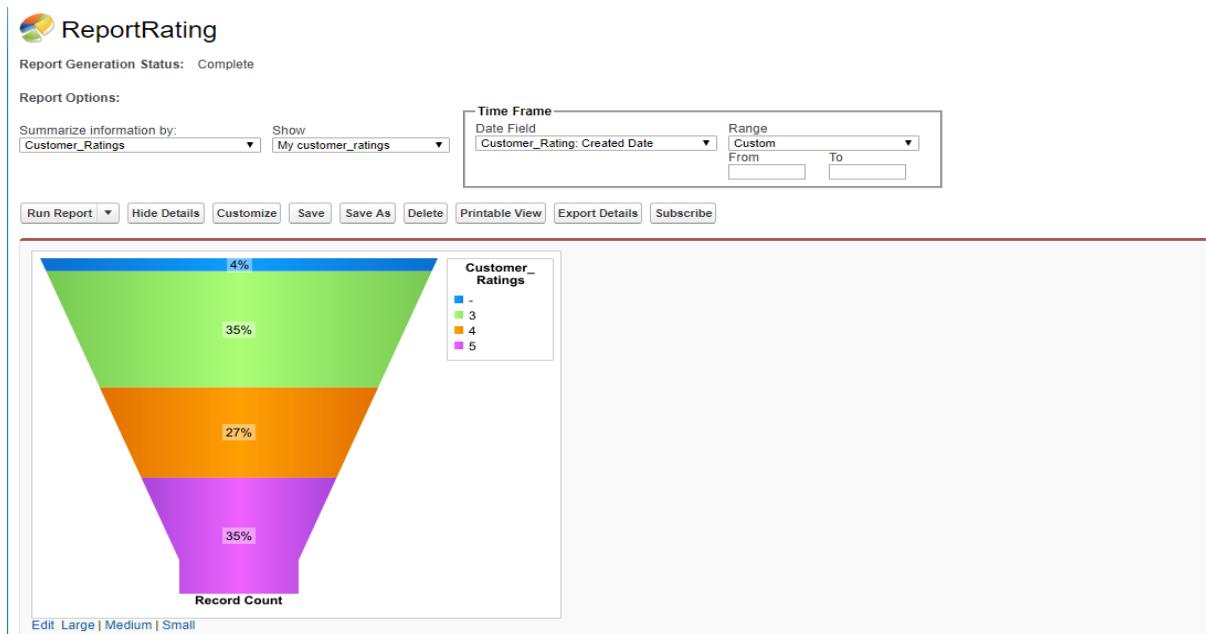
This second report shows use the favour payment method by the customer when they order a specific meal. As the organization tends to provide two types of option for payment i.e. Cash on Delivery and Online Payment, the customer can use any of the two methods. The histogram shows that people tends to pay more with COD as compared to Online Payment which is also close to the first option. As the initiative of modern era wants people to prefer cashless transaction which is much more safer and quicker we can promote the use of online payments to the customers by offering them certain kinds of occasional discount if they tend to pay online.

### 3) Delivery Report



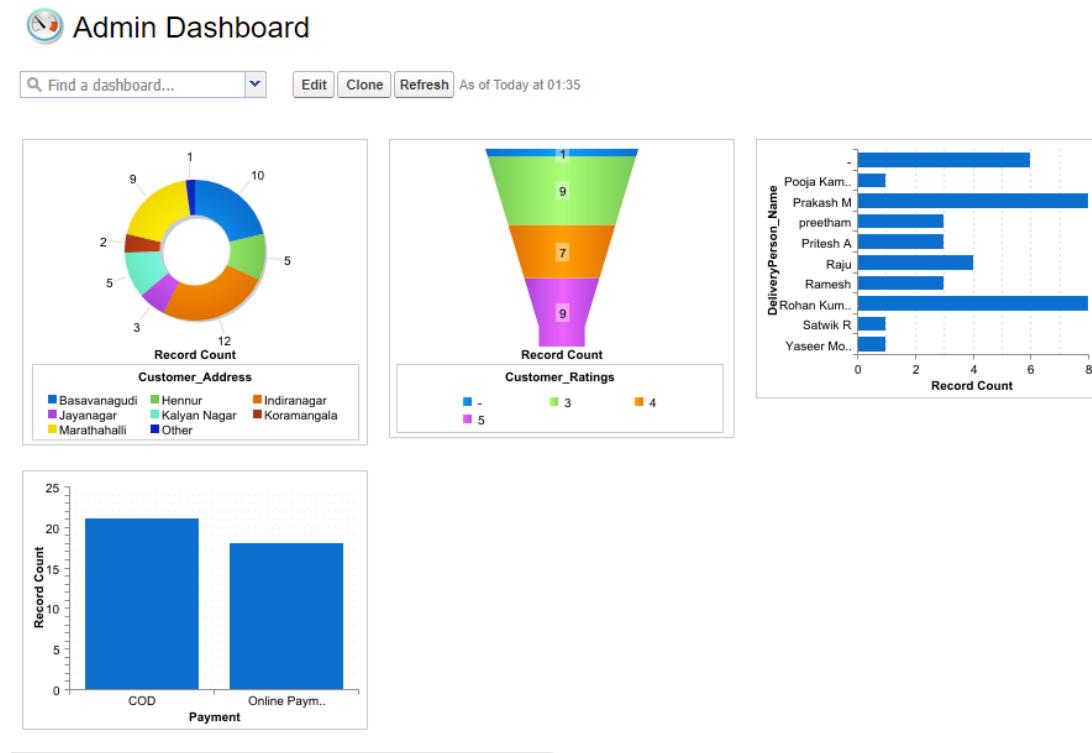
The third report is regarding the staff of the company. The above graph represents the number of delivery made by each of the delivery person. As we can see that Prakash M and Rohan Kumar have made most number of delivery which is followed by Raju, Pooja Kamath, Yaseer Mohamed and Satwik R have made the least number of delivery overall. It is necessary for the company to keep a track of the deliveries that are being made by these people as well as it is necessary for the company to provide incentives to them by setting a criteria of giving a reward to that person who will make the most deliver in a particular month.

#### 4) ReportRating



This last report is about the ratings which are provided by the customer to the organization in sense of a feedback. These ratings are in terms of overall satisfaction of the customer in terms of the quality of the food and the service provided. As this rating is not a mandatory field it is not necessary that each and every customer will share their opinion with the organization. The above screenshot shows that the 4% of the customer did not provide ratings as feedback for the company's improvement. Also the majority of the ratings belong to 3 and 5 which stand to 35 % each whereas 27% ratings belong to 4 rating. The 3 and 5 start ratings provides a platform for the organization to find out and analyse their short comings which can be tackled by the company so that they are able to pull more customers towards 5 star ratings.

## Dashboard:



A dashboard called as ‘Admin Dashboard’ has been created in the project implementation.

This dashboard comprises of all the 4 reports that have been generated for the analytical purpose and is integrated into one single dashboard. The dashboard is of great assistance when there are multiple reports that are present at a particular time as it helps while presenting all the created reports to the higher authorities of the company so that they can make decisions based on the visuals that have been generated in these reports as it would be hectic to present 100's of reports containing visuals differently which is also quite time consuming.

## Future scope:

This project has various nodes in it which can be expanded in a systematic manner while maintain the proper functioning of the organization. One of the major factors which affect the sales of a particular organization is the location range. This particular implementation is limited to 5 km range for the delivery of its meals as the organization is a newly developed one and it will take certain time for it to grow and spread so that it could attract more and more customers by establishing new branches.

Secondly aspect that could be explored is the service time. In this case the delivery time is an important aspect that should be managed efficiently by the organization, and this should work in a structured manner. Also to improve the service i.e. to cut down as much time as possible so that the product reaches to its designated customer within very less amount of time the outsourcing approach can be opted by the organization in partnership with e-tailers such as Zomato and Swiggy could assist our organization in delivering the food.

Apart from all the above-mentioned things, another important space for expansion is by opting the already in-use Salesforce platform to manage all the staff information and by managing their salaries as well as monthly performance evaluation can be done using this platform. As the number of food items are limited as the company is a fresh start-up it will require certain time to catch up speed after which the more meals could be added into the menu.

### **Team member workload contribution**

In this project all 4 team members have contributed equally through co-ordination and helping each other in development, adding platforms features details in report. Workload was initially divided equally as 2 people were engage in building platform and rest two were indulged simultaneously understanding platform and formatting report according to it. Starting from initial stage of understanding features of salesforce to final stage of making fully serviced CRM platform lot of changes were made by discussion around what features can be added or modified by report preparation team. And successfully we were able to match all set guidelines for project before deadline. We would like to also thank our project co-ordinator by providing us valuable apex code details on moodle so we can understand the basic of apex programming for building web pages.