

Wholesaler Order Management CRM

“Streamlining Retailer Orders with Transparency & Efficiency”

Industry: Wholesale / Distribution

Target Users: Wholesalers, Retailers, Sales Teams, Inventory Managers

Project Type: Salesforce CRM Implementation

Problem Statement

In the wholesale-retail ecosystem, retailers often place orders with wholesalers manually through phone calls, messages, or physical visits. This leads to delays, miscommunication, duplicate orders, and lack of transparency in order status. Wholesalers struggle to track orders efficiently, while retailers face uncertainty in delivery timelines.

The Wholesaler Order Management CRM solves this by enabling retailers to place orders directly in Salesforce, automating confirmation, tracking, and delivery updates. It provides dashboards for wholesalers to monitor inventory and order fulfillment while giving retailers full visibility into order status.

Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

Business Needs

- Allow retailers to place orders digitally via a self-service portal.
- Automate order confirmation and reduce manual dependency.
- Provide real-time dashboards for pending, processed, and delivered orders.
- Ensure wholesalers can track retailer order history for forecasting.
- Increase transparency with automated notifications and status updates.

Functional Requirements

- Order creation with unique Order IDs and duplication prevention.
- Automated email/SMS alerts for order confirmation, dispatch, and delivery.
- Dashboards for wholesalers to view New, Processing, and Completed orders.
- Retailer portal for order placement and tracking.
- Reports on top-selling products, delayed orders, and retailer demand trends.

Non-Functional Requirements

- Scalable to support hundreds of retailers and thousands of orders.
- User-friendly for retailers with minimal Salesforce training.
- Secure handling of order and payment data.
- Reliable integration with inventory and billing systems.

2. Stakeholder Analysis

- Retailers: Place and track orders, receive status updates.
- Wholesalers: Process orders, manage stock, and ensure timely deliveries.
- Sales Team: Monitors retailer demand and promotes products.
- Inventory Managers: Sync order processing with stock availability.
- System Admin: Configures Salesforce automation and ensures smooth system operation.

3. Business Process Mapping

Current Manual Flow

- Retailers call/message wholesalers to place orders.
- Orders are tracked in spreadsheets or notebooks.
- Delivery updates are communicated manually.
- Lack of centralized tracking leads to delays and confusion.

Proposed Automated Flow in Salesforce

- Retailers place orders in Salesforce portal with unique Order IDs.
- System sends automatic order confirmation to retailer.
- Real-time dashboards show order status (New, Processing, Dispatched, Delivered).
- Automated alerts sent to retailers for each order milestone.
- Wholesalers can forecast demand using reports and analytics.

4. Industry-Specific Use Case Analysis

- FMCG Wholesalers: Handle bulk orders quickly and reduce errors.
- Pharmaceutical Distributors: Ensure timely and transparent medicine delivery.
- Electronics Wholesalers: Manage high-value orders with visibility.
- Food & Beverage Suppliers: Improve delivery timelines and minimize stock-outs.

5. AppExchange Exploration

- Salesforce Order Management (SOM): For advanced order lifecycle management.
- Conga Composer: To generate invoices and delivery notes.
- Einstein Analytics: For demand forecasting.
- Decision: Use Salesforce-native Flows, Dashboards, and Automation for initial phase, ensuring cost-effectiveness and independence from external apps.