

Phase 1: Problem Understanding & Industry Analysis

Before jumping into Salesforce setup, Phase 1 ensures that you understand the **problem**, **users**, and **processes**.

1. Requirement Gathering

Ask: *What must this system do?*

- Scan products → fetch product code, price, expiry.
- Add items into a virtual cart → calculate totals.
- Associate purchases with customers.
- Send expiry reminders + promotional offers.
- Keep Salesforce data clean via automation.

Outcome: A clear list of system requirements.

2. Stakeholder Analysis

Identify *who benefits and how*:

- **Retailer/Manager** → Oversees products, promotions, and customer data.
- **Cashier/Staff** → Uses LWC scanner during checkout.
- **Customer** → Gets quick checkout + reminders + offers.
- **Salesforce Admin** → Handles org setup, permissions, and automation.
- **Developer** → Builds LWC, Apex classes, and integrations.

Outcome: A table mapping roles to expectations.

3. Business Process Mapping

Visualize the **workflow**:

1. Staff scans product → product details auto-captured.
2. Items added into a Salesforce-based cart.
3. Cart linked to a customer record.
4. Expiry reminders & festival offers triggered.
5. Batch jobs clean old/expired product data.

Outcome: A process flow diagram or documented workflow.

4. Industry-specific Use Case Analysis

See how this project fits into **real-world retail**:

- **Supermarkets (D-Mart, Walmart)** → faster checkout.
- **Small stores** → affordable alternative to expensive POS.
- **Customer loyalty** → reminders and offers boost engagement.

Outcome: A list of 3–4 scenarios where the project applies.

5. AppExchange Exploration

Check existing Salesforce apps:

- Barcode/QR scanner LWCs already exist.
- Retail Execution Management apps exist, but **you're focusing on automation + customer engagement**, which is a **unique gap**.

Outcome: Notes comparing existing solutions with your project's unique value.