

Replastix Innovations - Salesforce Project Report

Project Overview

Replastix Innovations, a pioneering organization in the field of plastic and recycled waste management, has integrated the Salesforce platform to automate business processes such as recycling, order management, inventory tracking, and reporting. With a robust data security model, the project ensures safe and efficient operation across departments.

Objectives

- Automate plastic waste recycling workflows
- Streamline inventory and order management
- Improve data security and controlled access
- Generate timely reports for data-driven decisions

Phase 1: Requirement Analysis & Planning

Replastix assessed its business needs for better recycling process management. The project scope included automation for inventory, secure data access via profiles and roles, and the use of flows for operational efficiency.

Data and Security Models: Custom objects for inventory and tasks; roles and profiles for controlled access.

Phase 2: Salesforce Development - Backend & Configurations

- Setup: Salesforce Org setup and environment preparation
- Objects and Fields: Custom objects for products, tasks, orders
- Flows: Inventory threshold triggers automated task creation
- Approval Process: Used Apex to handle multi-level approval
- Apex: Auto-email triggers for replenishment requests

Phase 3: UI/UX Development & Customization

- Lightning App with tabs for Inventory, Orders, Tasks

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- Dynamic Forms and Page Layouts per user role
- Reports and Dashboards for inventory KPIs
- Profiles for custom visibility of records

Phase 4: Data Migration, Testing & Security

- Used Data Import Wizard to load product and user data
- Profiles and Roles restrict visibility
- Flow testing with simulated stock drops
- Test cases documented for automation and email triggers

Phase 5: Deployment, Documentation & Maintenance

- Deployed using Change Sets to production
- Monitoring via login history and debug logs
- Troubleshooting handled with field tracking and alerts

Conclusion

This Salesforce-based solution has enhanced operational automation at Replastix Innovations, enabling smarter inventory and waste management. The streamlined communication, automated task flows, and secure access have improved efficiency and accuracy across departments.

What You'll Learn

- Salesforce Data Modelling
- Salesforce Data Security
- Objects, Fields, and Relationships
- Flow Builder
- Approving Records using Apex