

PROJECT REPORT

Project Title: CRM Application for Wholesale Rice Mill

Project Overview

The **CRM System for Wholesale Rice Mill** is a well-rounded tool created to optimize critical business processes. It enhances inventory management, tracks customer interactions, monitors sales activity, and generates daily reports. The system is designed to improve operational efficiency, offer insights into rice sales trends, and automate essential processes such as rollup summaries and detailed analytical reporting.

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1. Introduction

This CRM system for a wholesale rice mill was developed to address inefficiencies in managing rice stock, sales, and customer relationships. Leveraging Salesforce's CRM capabilities, the system offers tools to track inventory, process customer orders, analyze sales patterns, and generate detailed daily reports. Its primary goal is to improve operational workflows and enhance decision-making for rice inventory management and customer satisfaction. The application automates critical tasks such as rollup summary fields and provides analytics, which help drive business growth.

2. Object Definition

In Salesforce, objects represent entities that store data. The following objects were set up in the CRM system:

- **Customer:** Captures information such as contact details and purchasing history.
- **Rice Stock:** Keeps track of rice varieties, quantities, and prices.
- **Orders:** Records customer orders, items purchased, total amounts, and delivery statuses.
- **Supplier:** Holds data related to the suppliers who provide rice to the mill.

3. Tabs

Tabs provide an easy way to access different types of records:

- **Customer Tab:** Displays customer details and their order history.
- **Order Tab:** Enables tracking of customer orders, including order statuses and payments.
- **Stock Tab:** Shows up-to-date rice stock levels and pricing information.
- **Supplier Tab:** Manages supplier details and tracks deliveries.

4. The Lightning App

Built using Salesforce Lightning, this app delivers a seamless user experience with enhanced features:

- Custom dashboards provide key insights into rice sales and stock levels.
- Dynamic components allow users to manage customer orders and supplier

relationships effortlessly.

- Smooth navigation between tabs helps users interact with different aspects of the system efficiently.

5. Fields

The application uses a mix of standard and custom fields to capture the necessary data.

- **Standard Fields** include "Created By," "Owner," and "Last Modified," which are automatically generated by Salesforce.
- **Custom Fields** are tailored for specific business needs, such as:
 - "Rice Quantity" (tracks stock levels)
 - "Price per KG" (monetary field for rice pricing)
 - "Customer Loyalty Score" (assesses customer engagement based on order frequency)

Formula fields were created to automate complex calculations:

- **Rollup Summary Field:** Calculates total rice sold.
- **Cross-Object Formula Field:** Tracks total revenue from each customer order.

6. Page Layouts

Page layouts were customized to ensure relevant information is readily accessible:

- **Customer Page Layout:** Displays customer contact details and order history.
- **Order Page Layout:** Highlights order status, payment, and items purchased.
- **Stock Page Layout:** Lists available rice varieties and quantities.
- **Supplier Page Layout:** Manages procurement details from suppliers.

7. Profiles

Profiles were set up to control what users can see and do:

- **Worker Profile:** Access to customer orders and inventory management.
- **Employer Profile:** Full permissions for reports, dashboards, and managing all objects.
- **Owner Profile:** Comprehensive control over sales approvals and analytics.

8. Roles & Role Hierarchy

Defined roles ensure a clear workflow:

- **Owner:** Supervises all system activities.
- **Manager:** Reviews sales, approves large orders, and oversees stock levels.
- **Employee:** Manages customer relations, orders, and inventory updates.

9. Users

Each user in the system has an assigned profile and role:

- **Admin Users:** Manage stock, generate reports, and assign user roles.
- **Sales Reps:** Access customer data, manage orders, and monitor stock.

10. Permission Sets

Specific access rights were granted to users via permission sets:

- **Report Access:** Allows users to view sales and stock reports.
- **Order Approval:** Managers can approve or deny customer orders.

11. Reports

Custom Salesforce reports were generated to track business performance:

- **Daily Sales Report:** Summarizes rice sales, income, and popular rice varieties.
- **Customer Orders Report:** Provides an in-depth look at customer order trends.
- **Inventory Report:** Shows real-time stock levels and supplier orders.

12. Dashboards

Visual summaries are provided on the dashboard:

- **Sales Overview:** Displays sales trends over daily and monthly periods.
- **Inventory Levels:** Monitors current stock levels for different rice varieties.
- **Top Customers:** Highlights the highest-value customers and their order history.

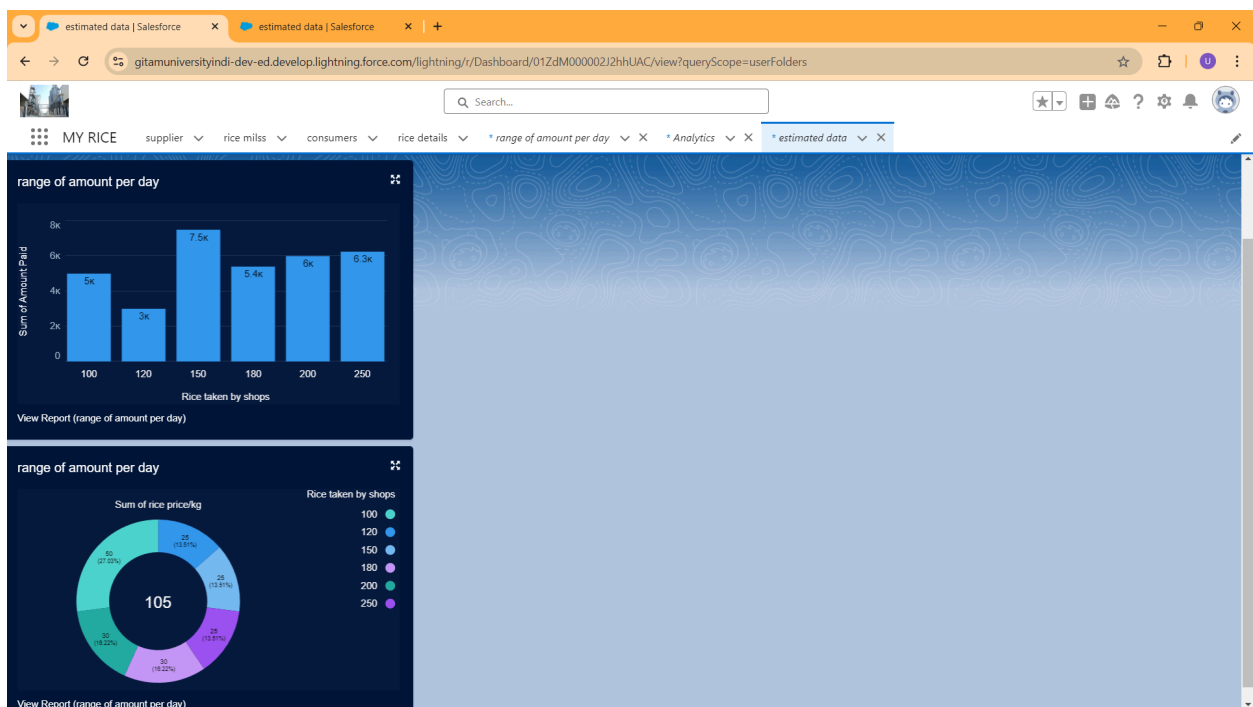
13. APEX

Custom APEX code was used to implement advanced functionality:

- Automatically updates rice stock after each customer order is processed.
- Sends email notifications to managers when stock levels fall below a threshold or when orders exceed a set limit.

14. Conclusion

This CRM solution revolutionizes the way a rice mill handles operations, offering automation, real-time data analysis, and streamlined processes. By centralizing customer management, sales tracking, and inventory control, the system allows for more efficient business decisions. The integration of real-time reports, role-based access control, and automated workflows ensures that the rice mill operates at optimal efficiency, helping it grow and remain competitive.



range of amount per day | Sale

estimated data | Salesforce

gitamuniversityindi-dev-ed.develop.lightning.force.com/lightning/r/Report/00OdM000007ALB3UAG/view?queryScope=userFolders

Search...

MY RICE

supplier

rice mills

consumers

rice details

* range of amount per day

* Analytics

* estimated data

Report: rice mills with consumers

range of amount per day

Enable Field Editing

Add Chart

Edit

Total Records

8

Total rice price/kg

105

Total Amount Paid

33,150.00

<input type="checkbox"/> Rice taken by shops	consumer: customer Name	rice price/kg	Mode of payment	Amount Paid
<input type="checkbox"/> 100 (2)	consumers-008	25	Net banking	2,500.00
	consumers-005	25	Net banking	2,500.00
Subtotal		50		5,000.00
<input type="checkbox"/> 120 (1)	consumers-002	25	Credit card	3,000.00
Subtotal		25		3,000.00
<input type="checkbox"/> 150 (2)	consumers-001	25	UPI	3,750.00
	consumers-006	25	Cash	3,750.00
Subtotal		25		7,500.00
<input type="checkbox"/> 180 (1)	consumers-007	30	Net banking	5,400.00
Subtotal		30		5,400.00
<input type="checkbox"/> 200 (1)	consumers-004	30	Credit card	6,000.00
Subtotal		30		6,000.00
<input type="checkbox"/> 250 (1)	consumers-003	25	Cash	6,250.00
Subtotal		25		6,250.00
Total (8)		105		33,150.00

Row Counts

Detail Rows

Subtotals

Grand Total