A CRM Application for Wholesale Rice Mill

1. Project Overview

This project focuses on developing a CRM application tailored for wholesale rice mills. It streamlines daily operations by automating reporting of rice sales, inventory, and revenue while enhancing customer management. The solution leverages Salesforce technology to improve operational efficiency, data accuracy, and user experience.

The application specifically addresses challenges such as tracking daily rice production, sales, and payments. It provides stakeholders with an intuitive interface, robust analytics, and comprehensive role-based access to ensure data security and efficient operations.

2. Objectives

Business Goals:

- Automate daily rice sales reporting.

- Simplify inventory and customer management.

- Enhance decision-making with actionable insights.

Specific Outcomes:

- Generate real-time dashboards and reports for rice sales and revenue.

- Implement validation rules for data integrity.

- Design a user-friendly interface for ease of use.

- Enable stakeholders to access reports and insights remotely via email notifications.

3. Salesforce Key Features and Concepts Utilized

- Roll-up summary fields to aggregate data efficiently.

- Cross-object formula fields for dynamic calculations across related objects.

- Validation rules to enforce data entry standards.

- Role-based permissions using Salesforce roles and profiles to define data visibility and access.

- Custom tabs for intuitive navigation.

- Lightning apps for centralized access to critical components.

- Real-time notifications through Apex triggers to keep stakeholders informed.

4. Detailed Steps to Solution Design

Data Models:

- **Custom Objects:** Supplier, Consumer, Rice Mill, and Rice Details.

- **Relationships:**

    - Master-detail relationships between Rice Mills and Rice Details.

    - Junction objects to connect suppliers and rice mills.

User Interface:

- Custom tabs for navigation across key objects.

- Page layouts organized into sections:

    - **Personal Details:** (e.g., Consumer Name, Contact Information).

    - **Rice Details:** (e.g., Quantity, Type of Rice).

    - **Payment Details:** (e.g., Mode of Payment, Amount Paid).

Business Logic:

- Apex classes for automated email notifications to consumers and stakeholders.

- Validation rules to ensure mandatory fields are completed and logical consistency is maintained.

- Formula fields for calculating total payments dynamically based on rice quantity and price.

supplier
Recently Viewed ▾ 📌

New   Import   Change Owner   Assign Label

1 item • Updated a few seconds ago

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	☐	**supplier Name**	∨
1	☐	MahaLaxmi Stores	▼

Report: rice mills with consumers
range of amount per day

✏ Enable Field Editing   🔍 ⟳ ▽ C   Edit ▾

Total Records	Total rice price/kg	Total Amount Paid
4	180	2,760.00

Rice taken by shops ↑ ▼	rice mill: rice mill Name ▼	consumer: consumer Name ▼	Consumer Name ▼	Rice type ▼	rice price/kg ▼	Mode of payment ▼	Amount Paid ▼
☐ - (1)	rice-001	consumers-001	Mada Nithish Reddy	-	100	-	0.00
Subtotal					100		0.00
☐ 8 (1)	rice-001	consumers-002	Rohi kumar	basmathi	100	Debit card	800.00

Row Counts 🔵 Detail Rows 🔵 Subtotals 🔵 Grand Total 🔵

range of amount per day

20-Dec-2024, 11:45 am - Viewing as Mada Nithish Reddy

range of amount per day

20-Dec-2024, 11:45 am - Viewing as Mada Nithish Reddy
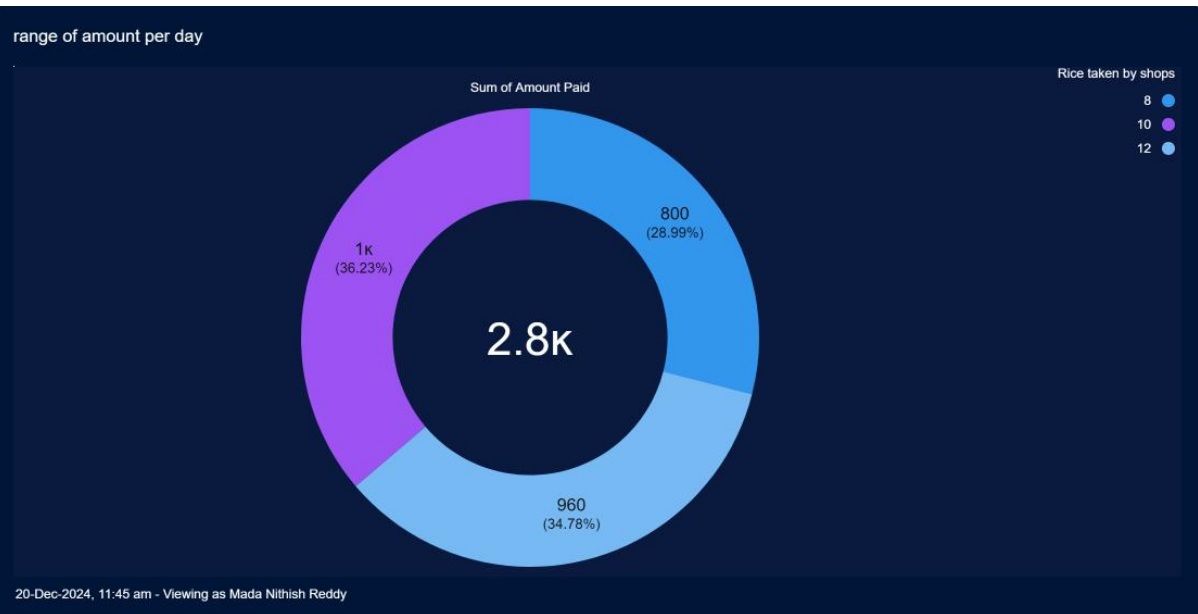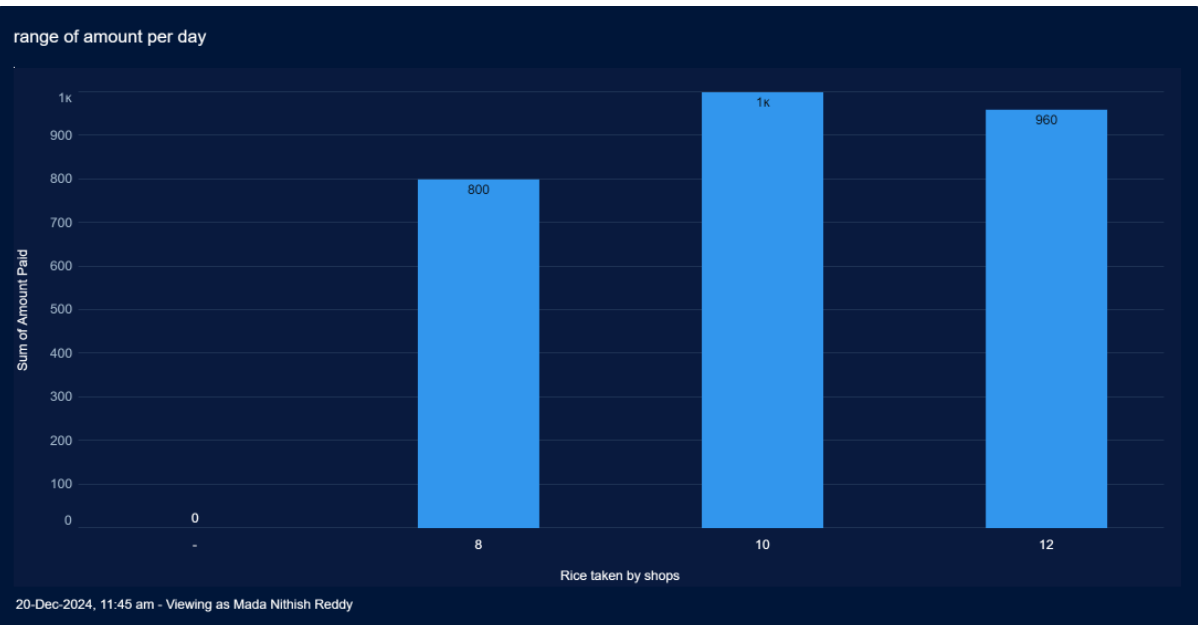
5. Testing and Validation

Unit Testing:

- Test Apex classes and triggers to validate business logic.

- Verify the roll-up summary fields for accurate aggregation.

User Interface Testing:

- Ensure all fields are properly displayed and functional.

- Validate navigation between custom tabs and Lightning apps.

Integration Testing:

- Test email notifications sent through Apex triggers.

- Verify report generation and dashboard display for accuracy and performance.

6. Key Scenarios Addressed by Salesforce in the Implementation Project

- **Daily Operations:** Track daily rice sales, inventory, and payments with precision.

- **Customer Management:** Enable quick access to consumer records and associated transactions.

- **Stakeholder Reporting:** Provide automated reports and dashboards to stakeholders for informed decision-making.

- **Data Security:** Use role-based access to restrict data visibility based on user roles.

7. Conclusion

Summary of Achievements:

- Successfully developed a feature-rich CRM system tailored for rice mills, addressing specific operational challenges.

- Automated daily reporting, enhanced data accuracy, and simplified customer management.

- Improved stakeholder engagement through real-time notifications and comprehensive dashboards.

- Empowered users to make data-driven decisions efficiently, contributing to overall business growth.