Project Title: A CRM Application for Wholesale Rice Mill

1. Project Overview

This project focuses on developing a Salesforce-based CRM application tailored for wholesale rice mills. The primary objective is to streamline business operations, improve customer relationship management, and optimize sales processes. By leveraging Salesforce's capabilities, we aim to enhance operational efficiency, provide a seamless user experience, and ensure accurate data management. This project supports the long-term goals of increasing market reach, improving customer satisfaction, and enabling data-driven decision-making for wholesale rice mills.

2. Objectives

Business Goals:

- Streamline the sales and order management processes.
- Enhance customer relationship management by providing detailed insights into customer interactions.
- Improve inventory tracking and order fulfillment efficiency.
- Facilitate seamless communication between sales teams and clients.
- Increase overall operational transparency and efficiency.

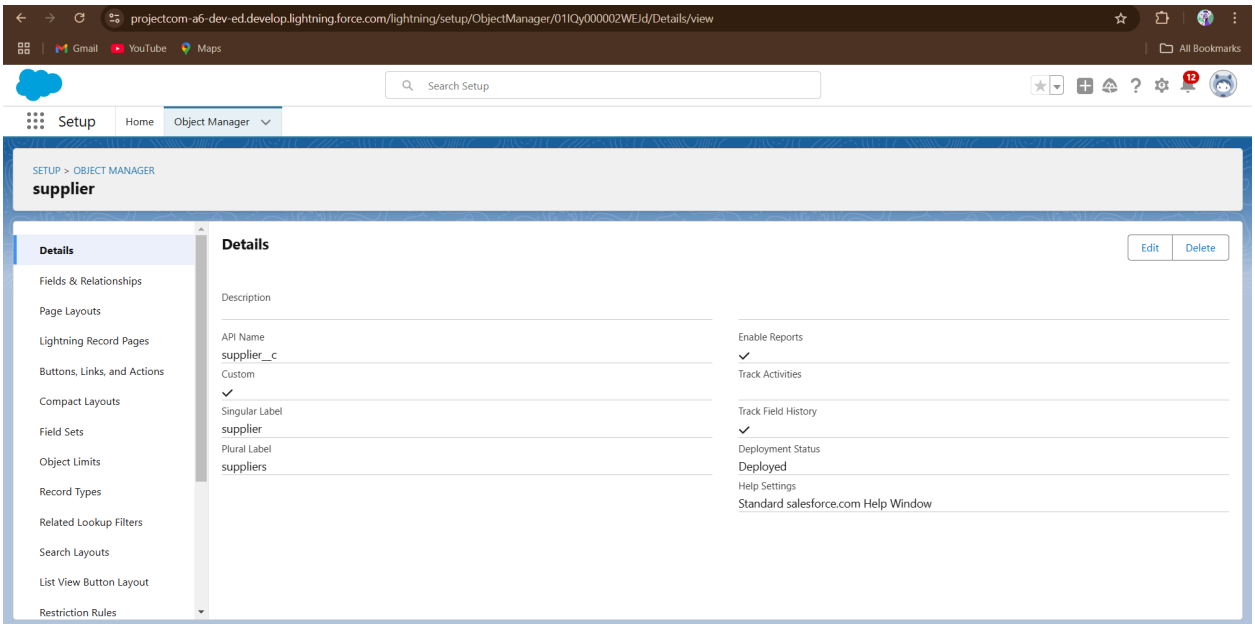
Specific Outcomes:

- Develop a centralized database for managing customer information, orders, and inventory.
- Create custom Salesforce workflows to automate routine tasks.
- Implement dashboards and reports for real-time analytics.
- Enable mobile access for on-the-go CRM functionalities.

3. Salesforce Key Features and Concepts Utilized

- Sales Cloud: To manage leads, opportunities, and sales pipelines.
- Custom Objects: For managing rice inventory, orders, and supplier details.

OBJECTS: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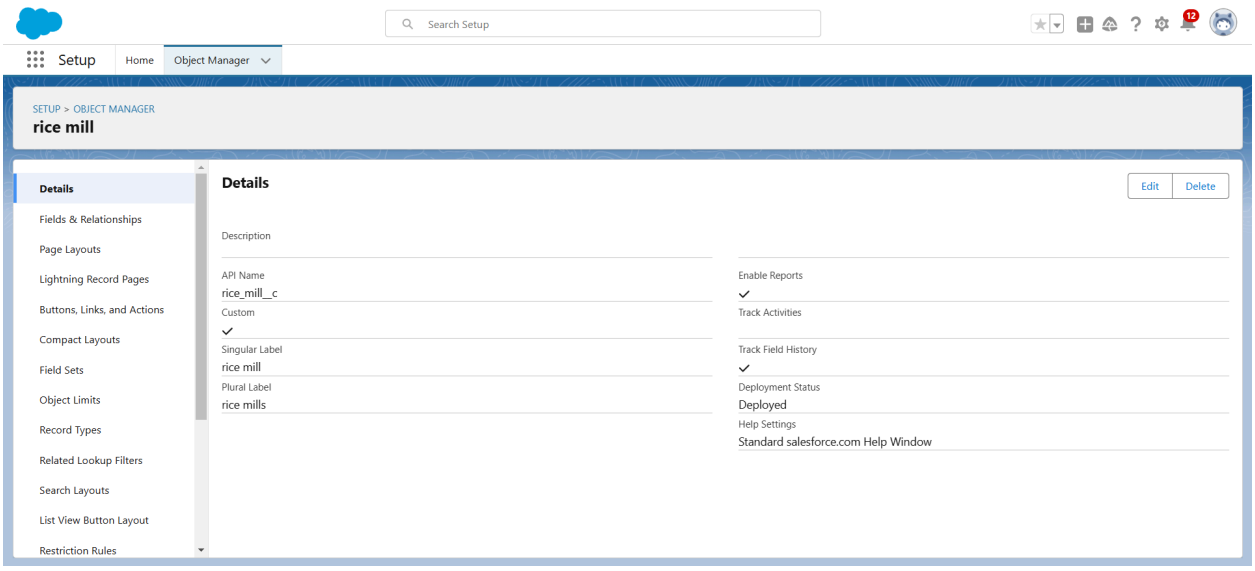
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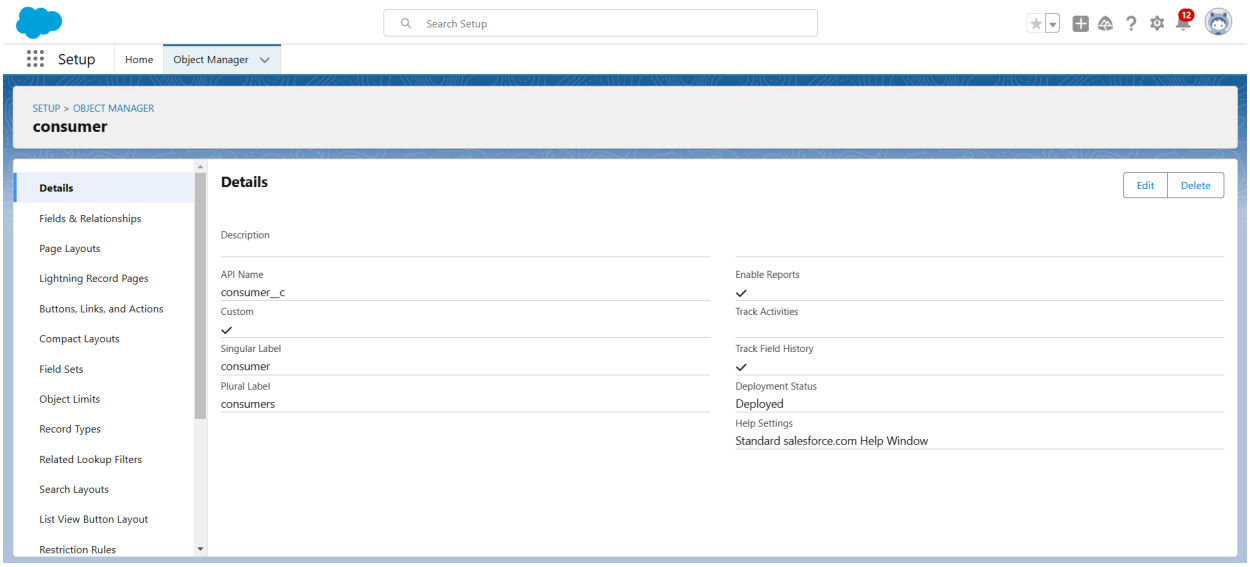
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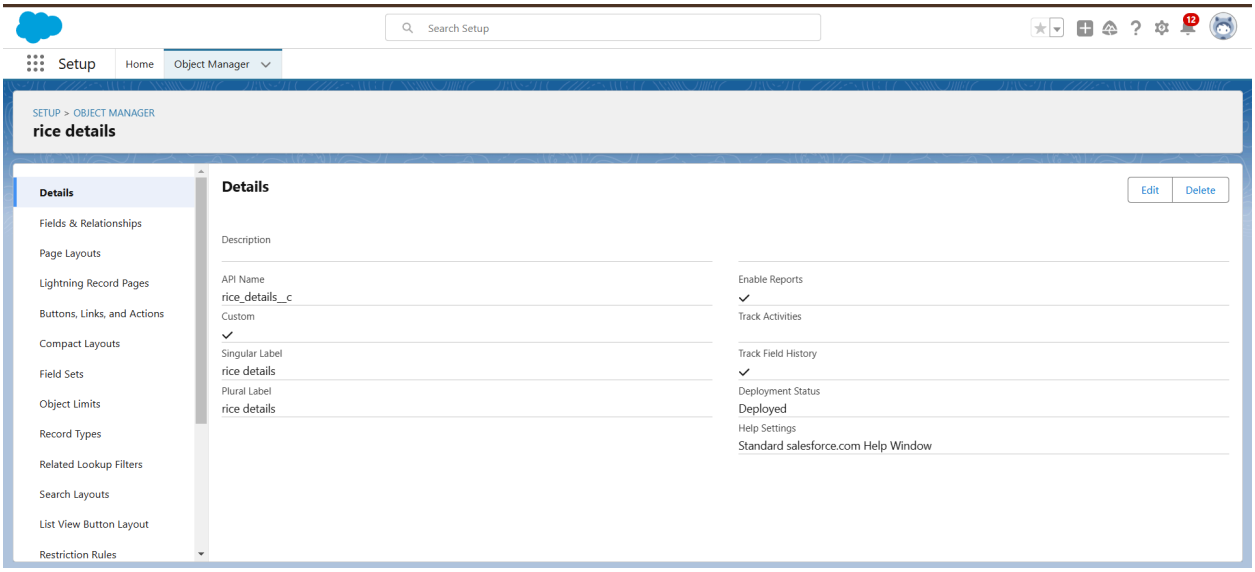
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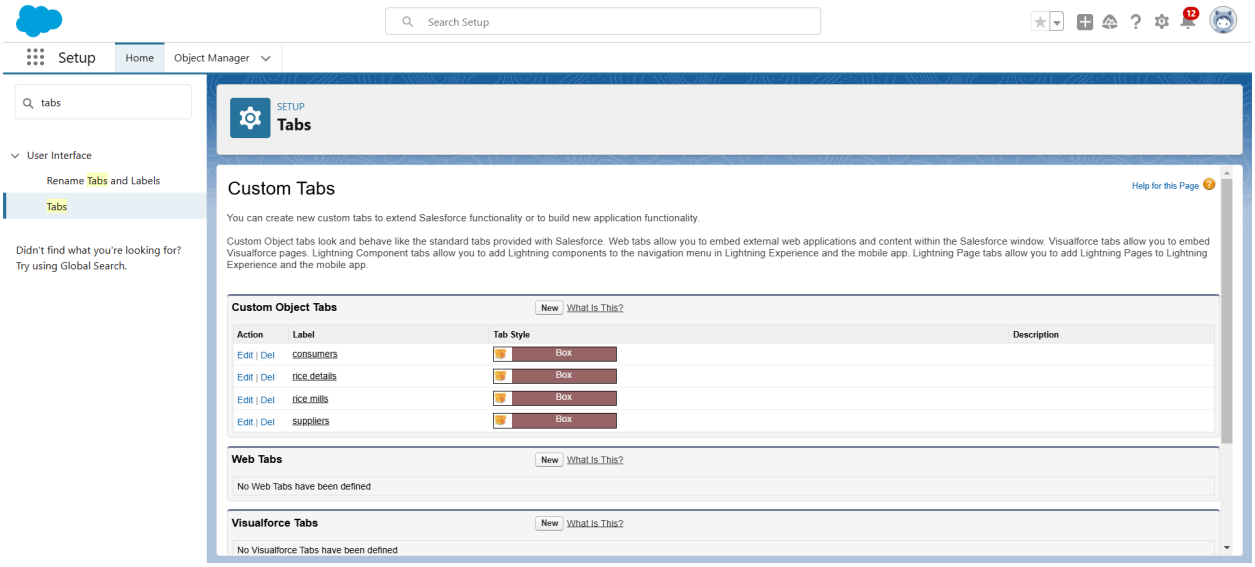

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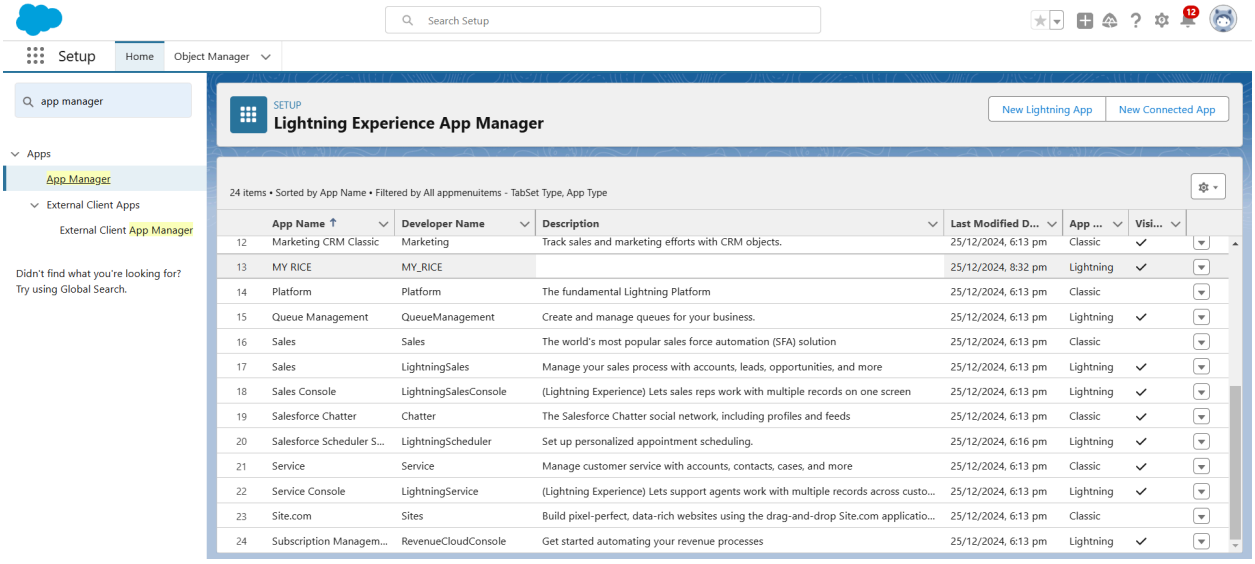

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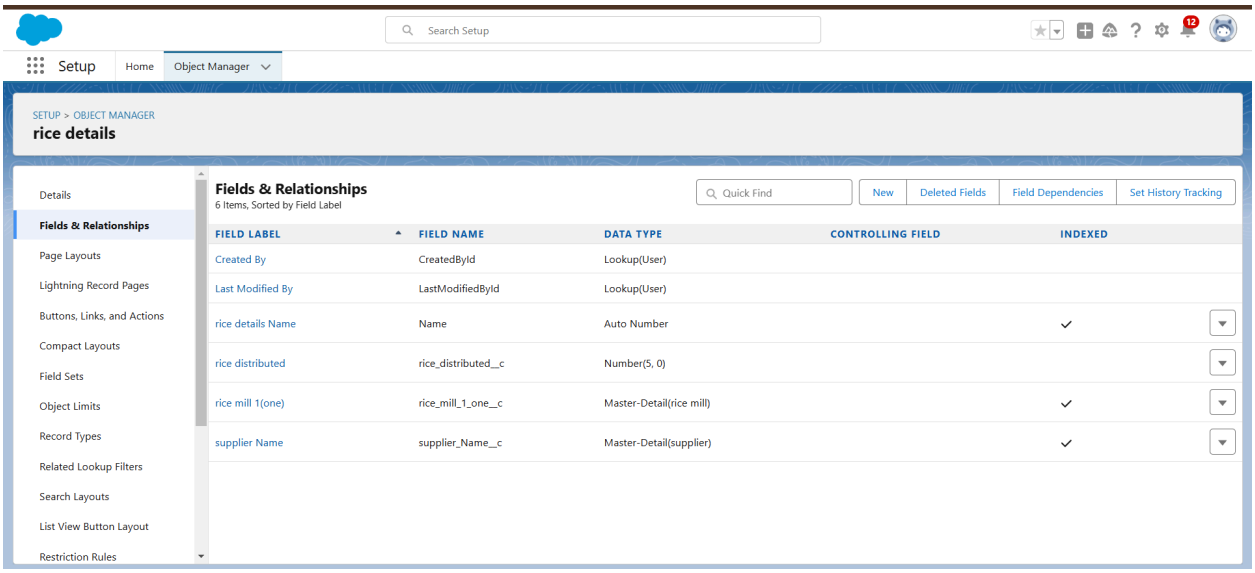
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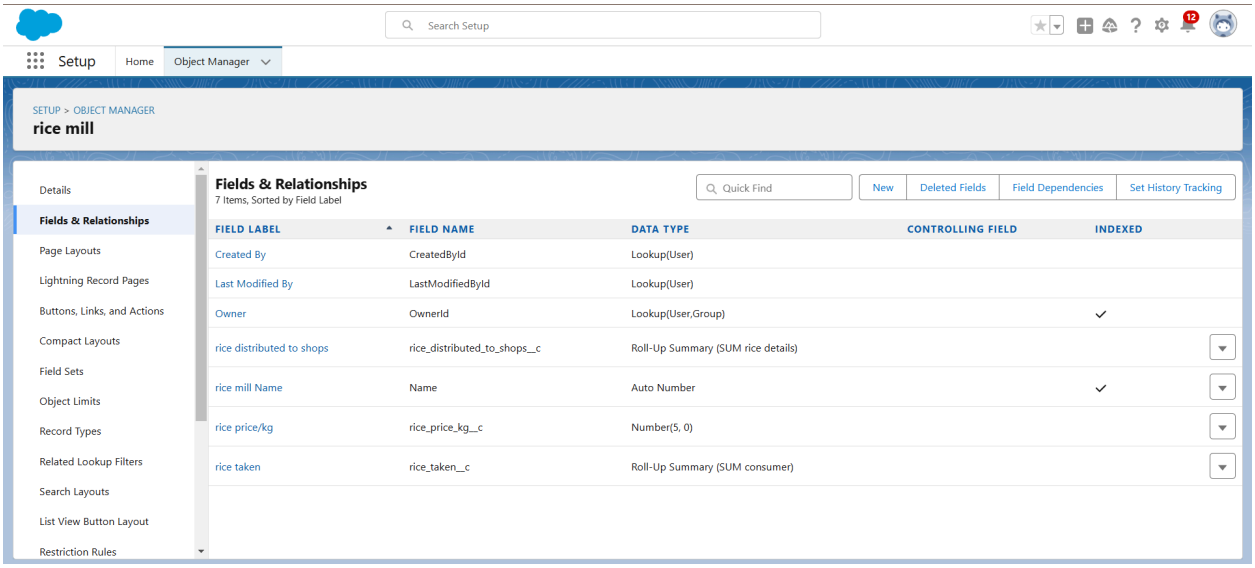
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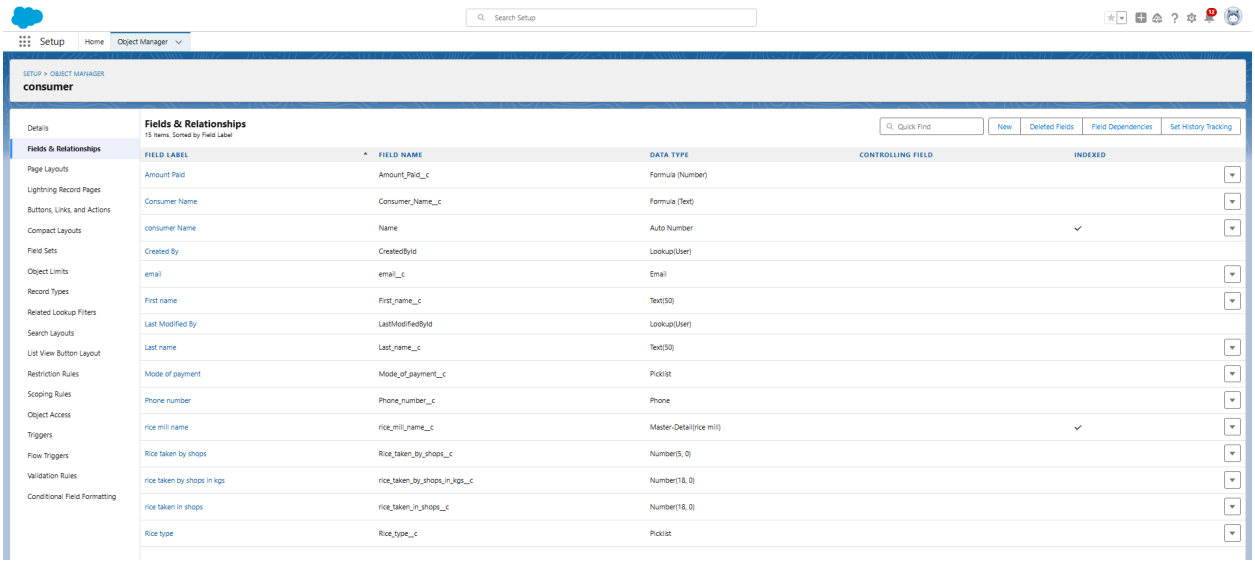
Roll-Up Summary (SUM consumer)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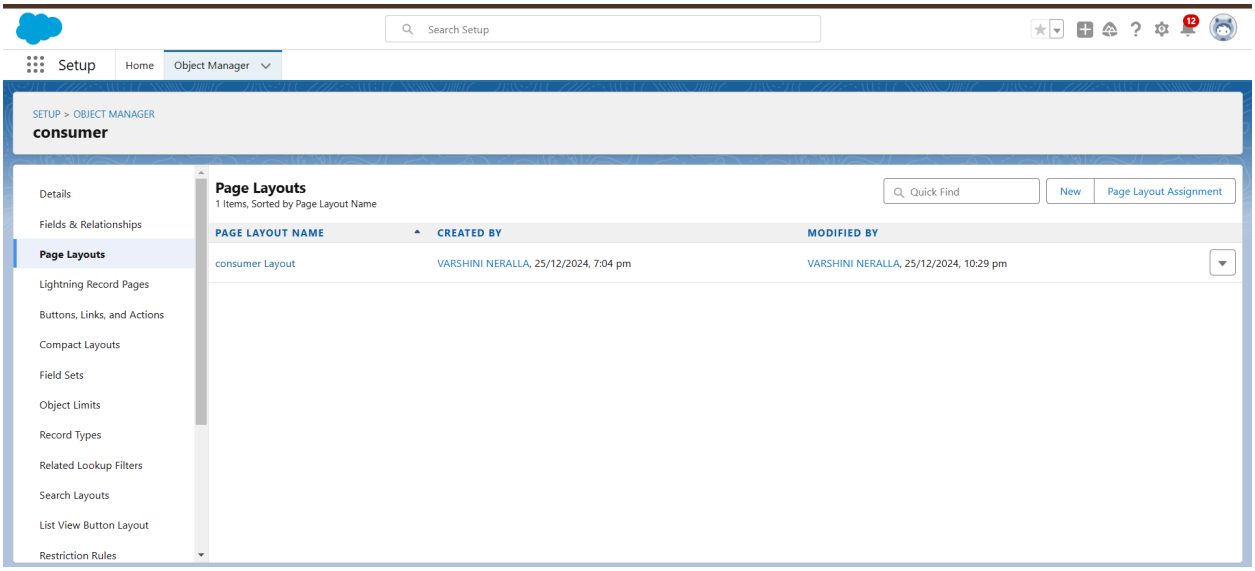

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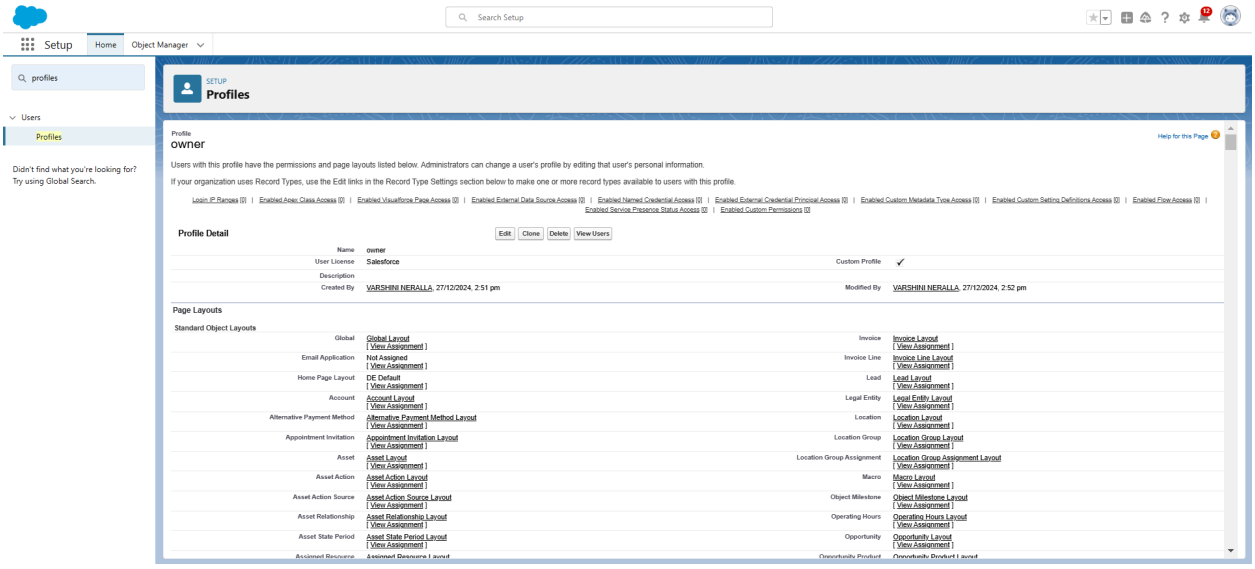

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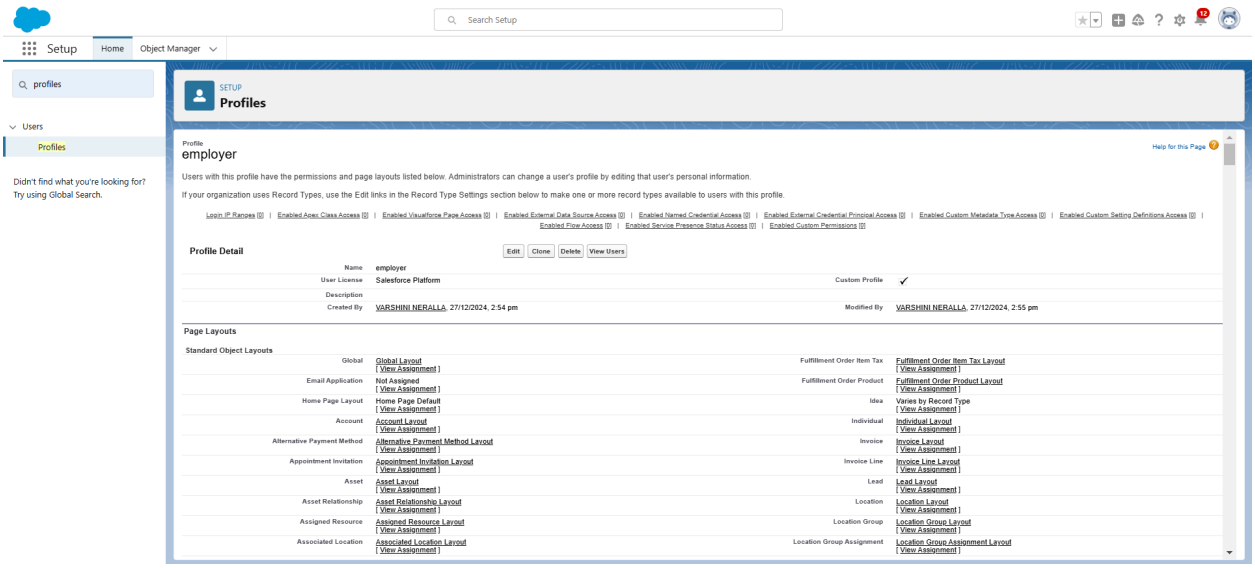

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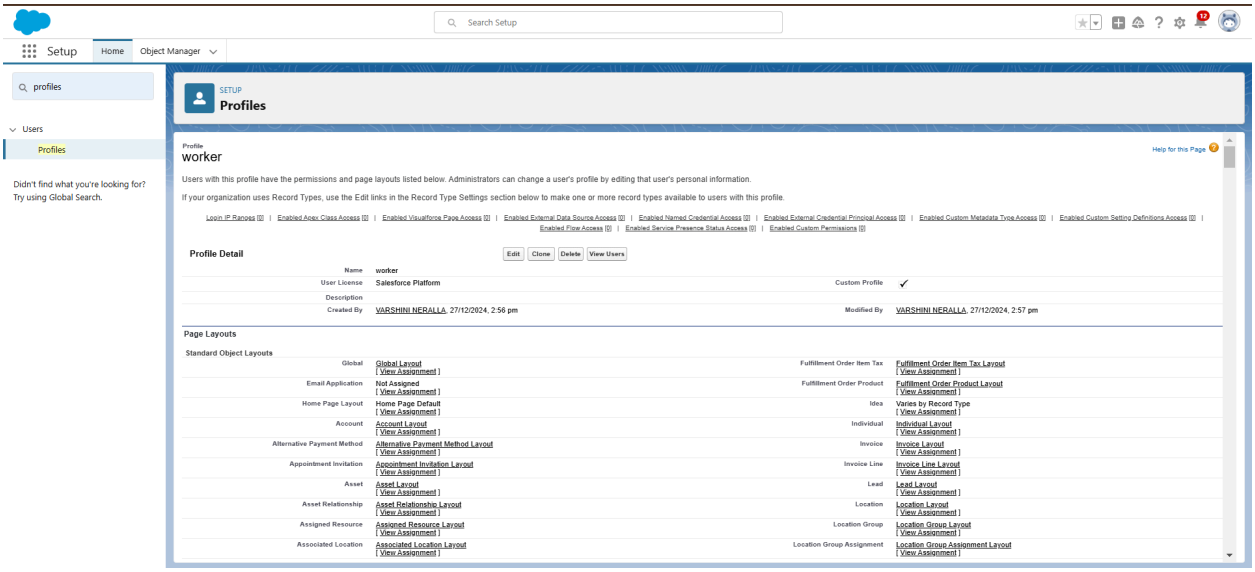

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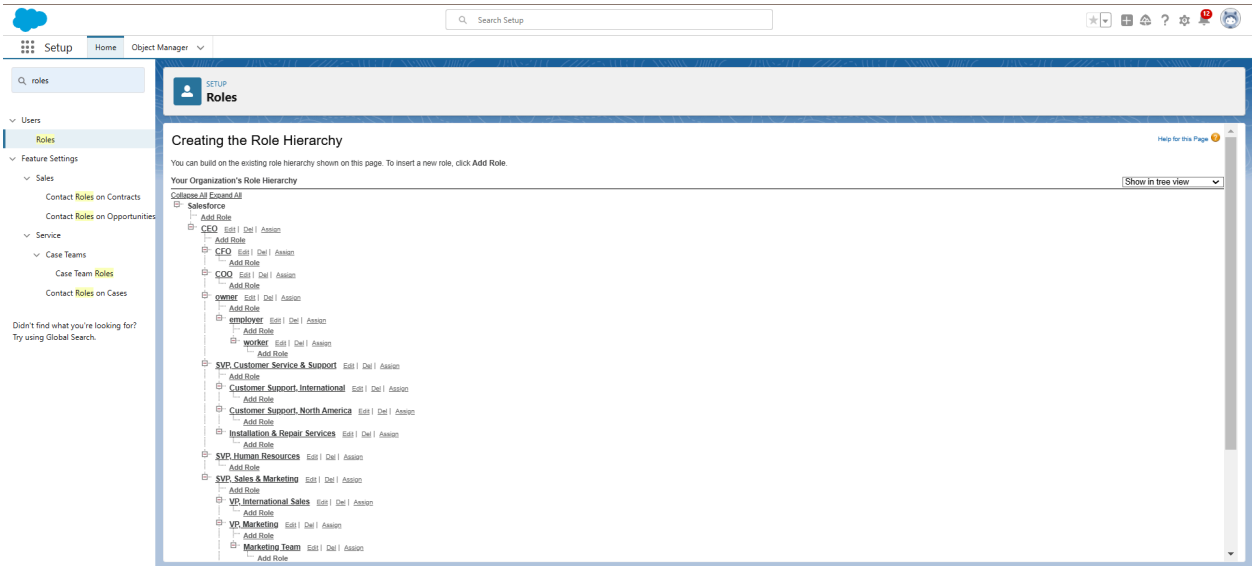

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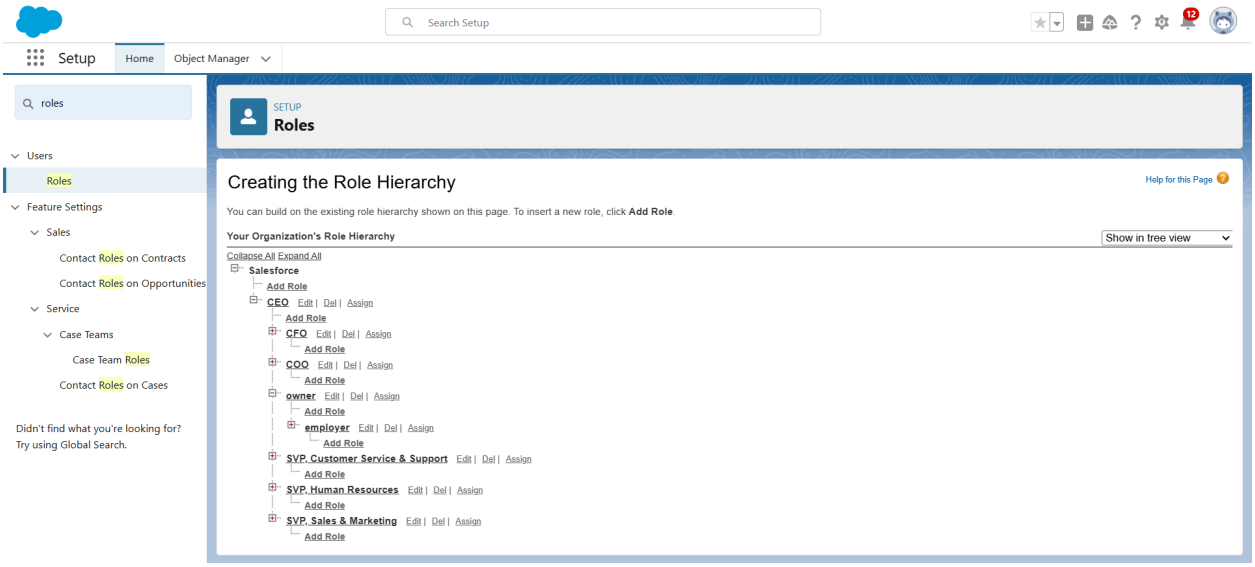
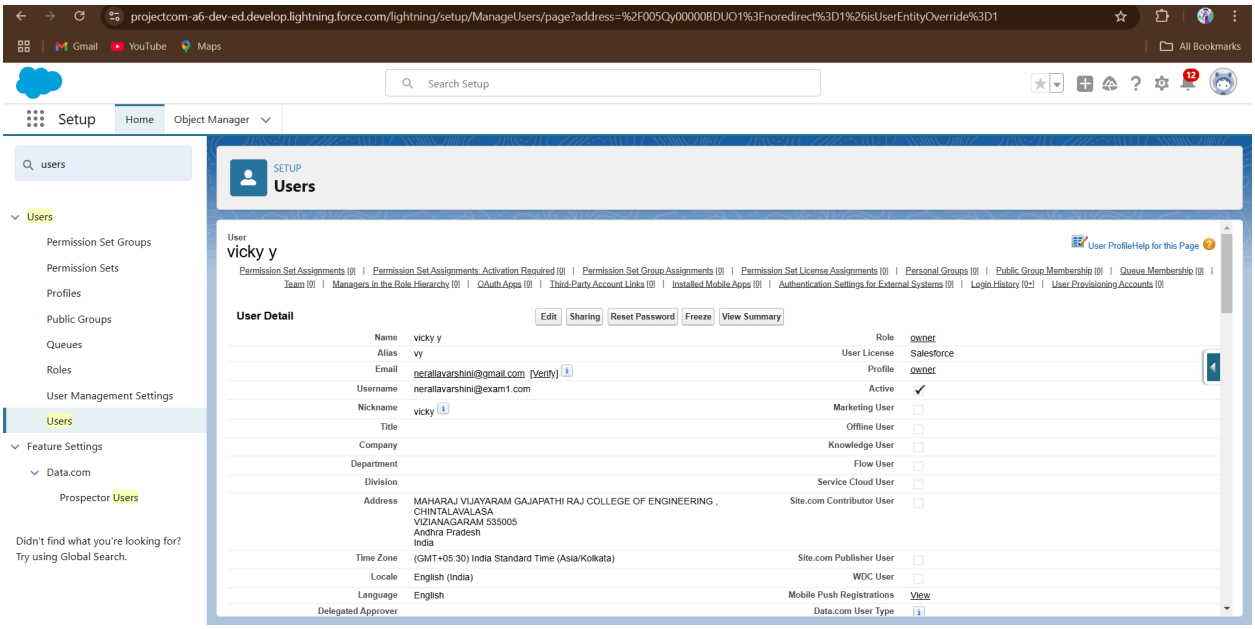


USERS:

1.VICKY
2.RAM
3.RAGU RAJ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CHINTALAVALASA
VIZIANAGARAM 535005
Andhra Pradesh
India
Time Zone
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User License
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Profile
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Active
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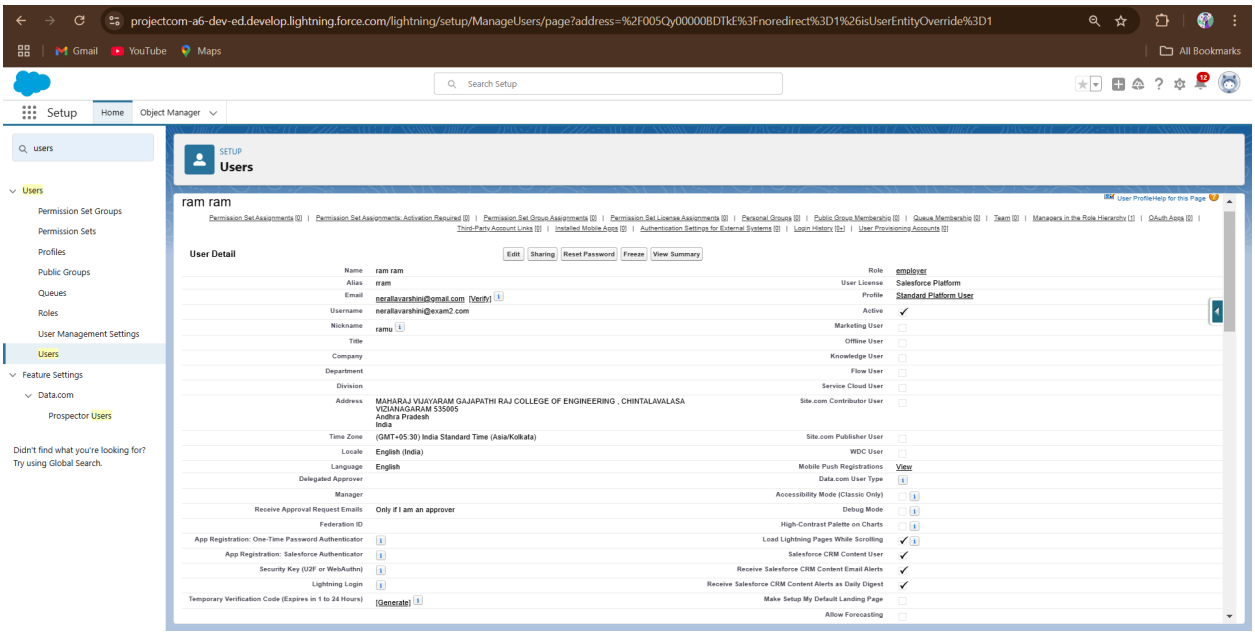
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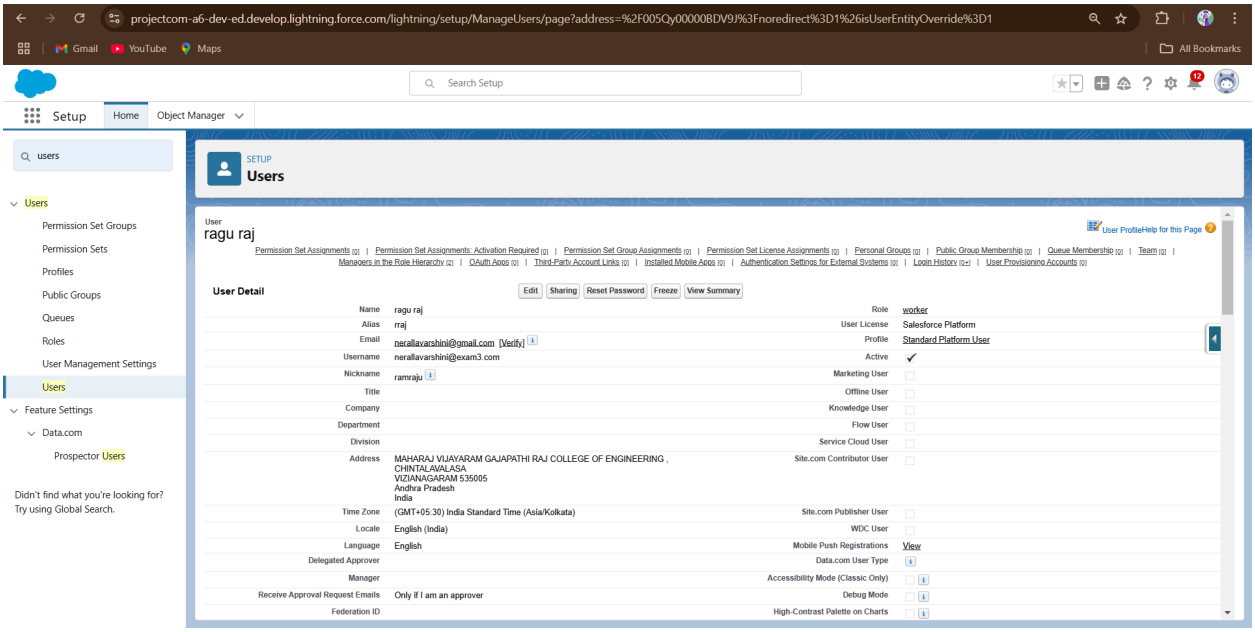

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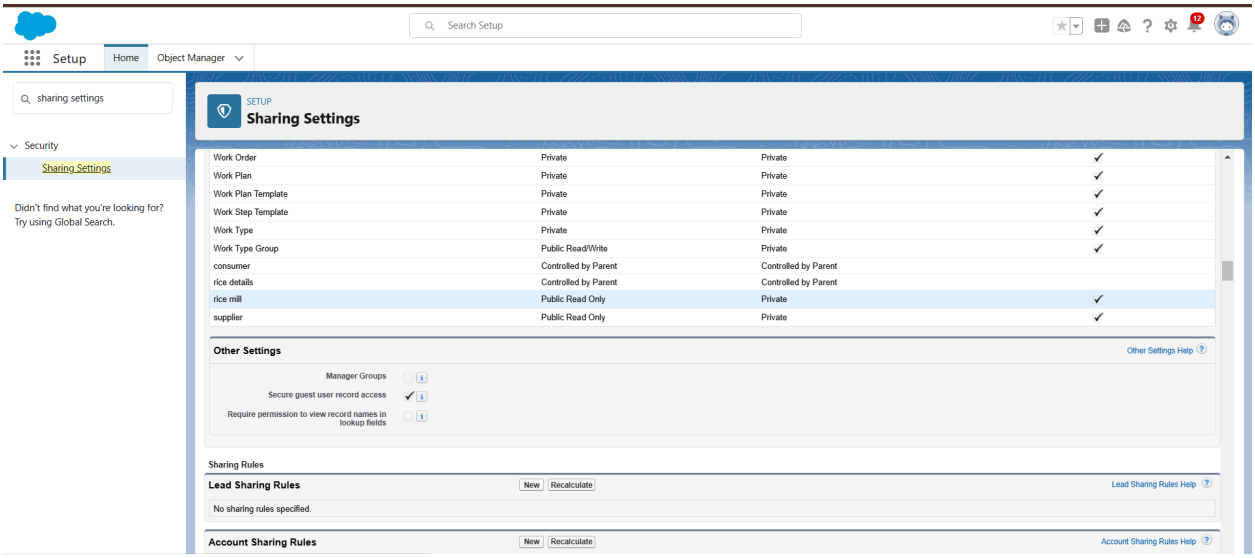

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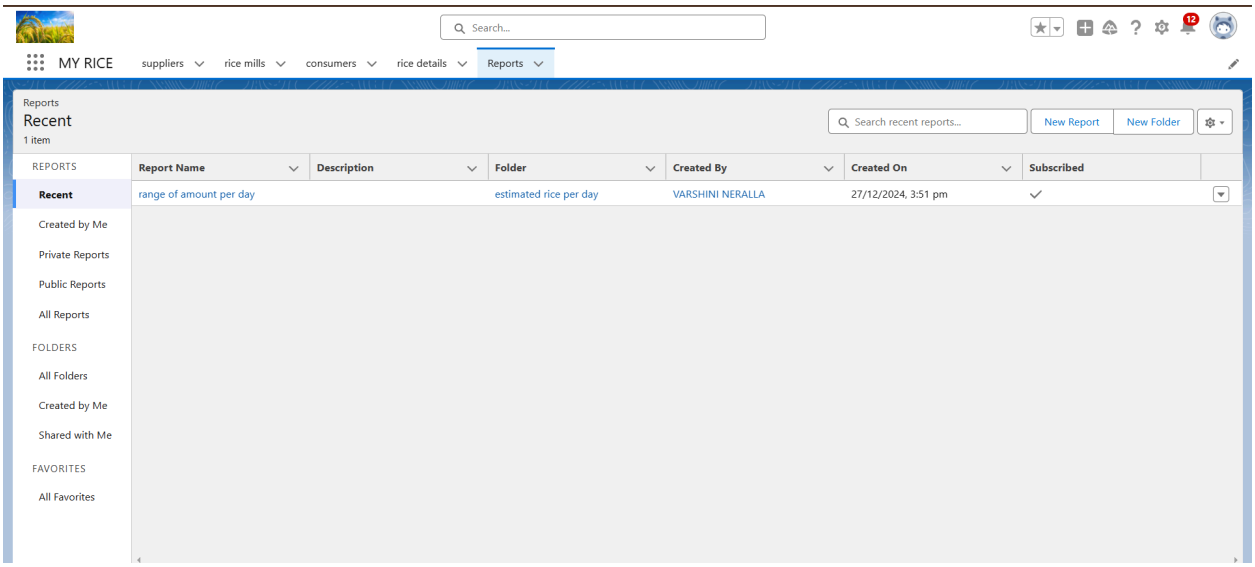

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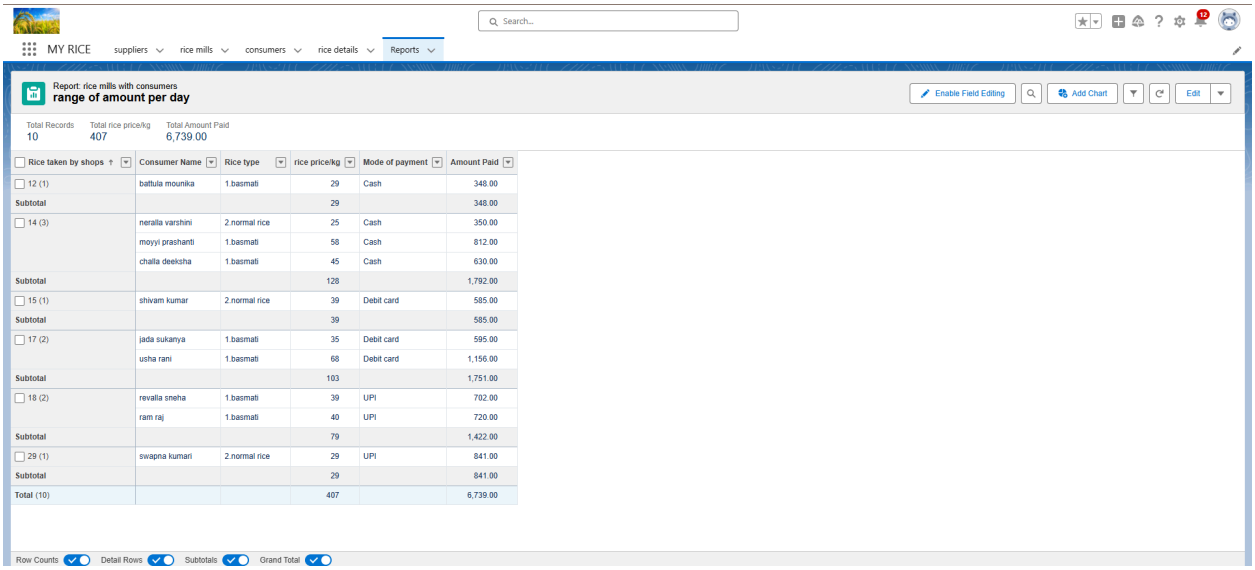

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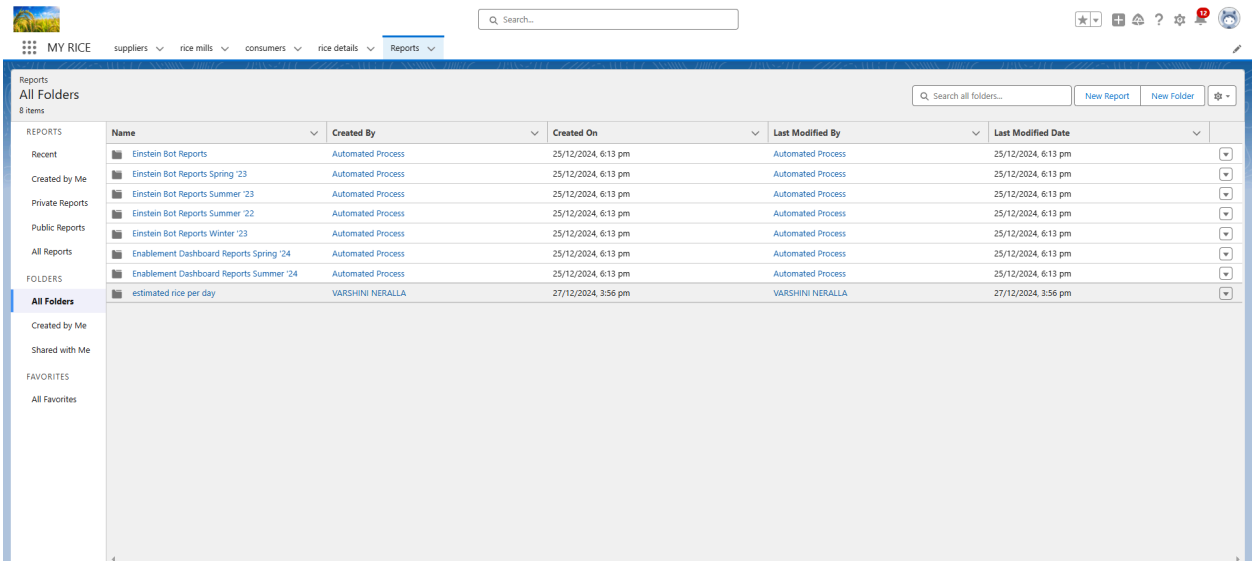
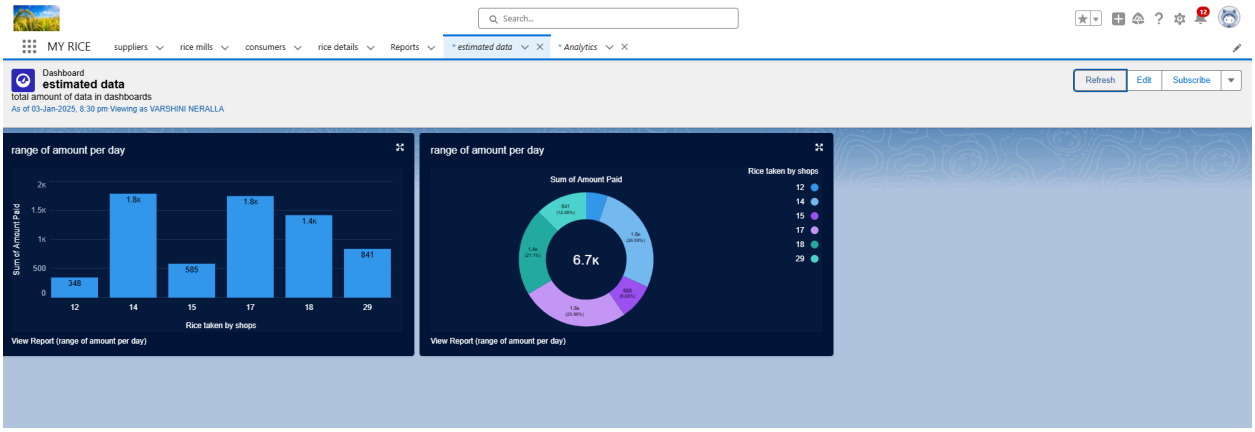


Workflow Rules and Process Builder: To automate tasks such as order confirmations and follow-ups.

- Reports and Dashboards: For monitoring sales performance, inventory levels, and customer interactions.
- Apex and Visualforce: For implementing custom business logic and UI enhancements.
- Lightning Components: For an enhanced and responsive user interface.



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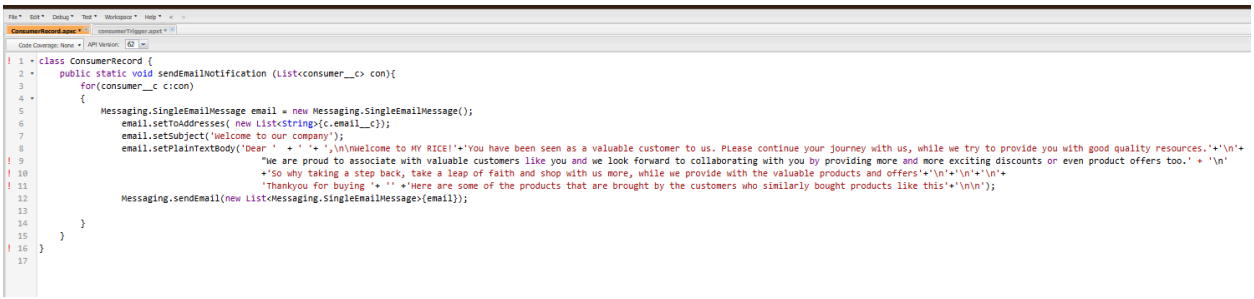

```
class ConsumerRecord {
    public static void sendEmailNotification (List<consumer__c> con){
        for(consumer__c c:con)
        {
            Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
                email.setToAddresses( new List<String>{c.email__c});
                email.setSubject('Welcome to our company');
                email.setPlainTextBody('Dear ' + c.Name + ',\n\nWelcome to MY RICE!'+'You have been seen as a valuable customer to us. PLease continue your journey with us, while we try to provide you with good quality resources.'+'\n'+
                                       'We are proud to associate with valuable customers like you and we look forward to collaborating with you by providing more and more exciting discounts or even product offers too.' + '\n'
                                      +'So why taking a step back, take a leap of faith and shop with us more, while we provide with the valuable products and offers'+'\n'+'\n'+'\n'+
                                       'Thankyou for buying '+ '' +'Here are some of the products that are brought by the customers who similarly bought products like this'+'\n\n');
                Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});

        }
    }
}
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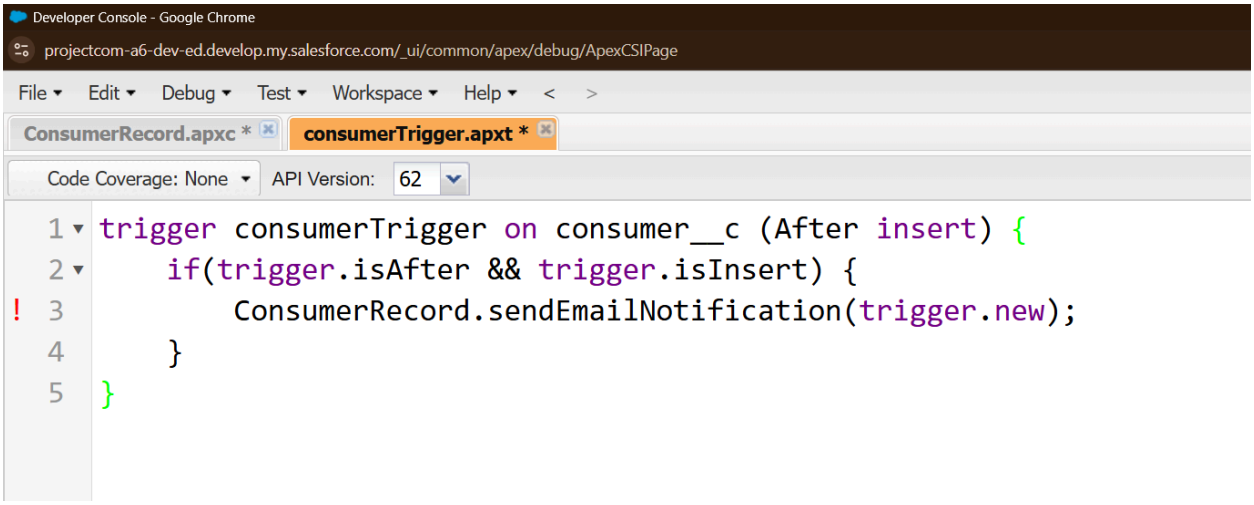

Developer Console - Google Chrome

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ConsumerRecord.apxc * | consumerTrigger.apxt *

Code Coverage: None | API Version: 62

```
1  trigger consumerTrigger on consumer__c (After insert) {
2      if(trigger.isAfter && trigger.isInsert) {
3          ConsumerRecord.sendEmailNotification(trigger.new);
4      }
5  }
```

4. Detailed Steps to Solution Design

1.Requirement Gathering:

- Understand the key pain points and requirements of the wholesale rice mill business.
- Document the needs related to customer management, order tracking, and sales processes.

2.Data Model Design:

- Create custom objects such as Customer, Order, RiceInventory, and Supplier.
- Define relationships between objects (e.g., Customers and Orders, Inventory and Orders).

3.UI Design:

- Develop user-friendly Lightning pages for key entities.
- Implement search functionality for quick access to records.

4.Business Logic Implementation:

- Use Apex classes and triggers for custom business rules, such as inventory

deduction upon order fulfillment.
- Configure validation rules to ensure data accuracy.

5.Automation:
- Create workflows for sending automated emails for order confirmations and delivery updates.
- Use Process Builder for follow-up reminders based on order status.

6.Reports and Dashboards:
- Build dashboards showing sales trends, top customers, and inventory status.
- Configure real-time reports for quick insights.

5. Testing and Validation

- **Unit Testing:**
  - Test Apex classes and triggers to ensure accuracy in business logic implementation.
- **User Interface Testing:**
  - Validate the usability and responsiveness of Lightning pages across devices.
- **Integration Testing:**
  - Verify data flows between different Salesforce components and third-party systems (if any).
- **User Acceptance Testing (UAT):**
  - Engage end-users to test the application against real-world scenarios.

6. Key Scenarios Addressed by Salesforce in the Implementation Project

- Efficient tracking of bulk orders and their statuses.
- Maintaining accurate inventory levels with automated updates.
- Generating detailed sales and customer interaction reports.
- Automating repetitive tasks, such as follow-ups and confirmation emails.
- Enabling mobile access for field sales teams.
- Providing a 360-degree view of customer information to improve service quality.

7. Conclusion

Summary of Achievements:

- Successfully implemented a customized CRM solution for wholesale rice mills using

Salesforce.

- Streamlined sales and order management processes.
- Enhanced customer relationship management through automation and detailed insights.
- Improved inventory tracking and operational efficiency.
- Delivered a scalable and user-friendly system aligned with the business's long-term goals.

This project demonstrates the potential of Salesforce as a transformative tool for the wholesale rice mill industry, setting a strong foundation for future growth and innovation.