Phase 1: Problem Understanding & Industry Analysis

Problem Statement

A groundnut processing mill currently relies on manual tracking for raw material purchases, production (cleaning, frying, packing), sales orders, and customer records. This leads to inefficiencies, errors in counting packets and bags, and lack of real-time visibility for the business owner.

The goal is to implement a **Salesforce-based CRM & Production Management System** that automates:

- Supplier and purchase tracking

- Production workflow monitoring

- Inventory management (packets & bags)

- Customer order and sales recording

- Daily revenue and performance reporting

Requirement Gathering

Key requirements collected from business operations:

- **Raw Material Management:** Record purchases from suppliers (date, quantity, cost).

- **Production Tracking:** Monitor each batch through cleaning, frying, packing stages.

- **Inventory Automation:** Auto-create 1 Bag record when 50 Packets are packed.

- **Sales Order Management:** Capture customer details, order size (bags), and payment.

- **Revenue Calculation:** Daily revenue = number of bags × price per bag (₹250).

- **User Roles:**

    o Owner/Manager → needs dashboards, reports.

    o Supervisor → monitors production batches and sales orders.

    o Workers → record production data (simple UI).

- **Notifications/Automation:** Alerts for low raw material, daily sales summary for owner.

Stakeholder Analysis

- **Owner/Manager** → Wants revenue dashboards, supplier tracking, customer management.

- **Supervisor** → Needs to track worker activity, production progress, and order fulfillment.

- **Workers** → Need an easy interface to log batch activities (cleaning/frying/packing).

- **Customers** → Expect timely delivery, order receipts, and accurate billing.

- **Suppliers** → Provide raw groundnuts; their purchase records need to be tracked.

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4 Business Process Mapping

Step-wise flow:

1. Owner buys raw groundnuts → record Supplier & Purchase.

2. Raw material assigned to a Production Batch.

3. Workers process → Cleaning → Frying → Packing (Packets created).

4. System aggregates packets into Bags (50 packets = 1 bag).

5. Customer places order → Sales Order created → Payment recorded.

6. End of day → system generates Revenue & Sales reports.

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5 Industry-specific Use Case Analysis

- **Industry:** FMCG / Food Processing.

- **Challenges:** Manual records, dependency on paper/logbooks, no real-time tracking, error-prone inventory counting.

- **Why Salesforce?**

  o Provides scalable CRM to track suppliers, customers, and sales.

  o Automates production and sales workflows.

  o Offers dashboards for instant revenue tracking.

  o Allows role-based access for owner, supervisor, and workers.

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6 AppExchange Exploration

Relevant Salesforce AppExchange apps:

- **Accounting Seed** – for financial tracking and invoicing.

- **Conga Composer** – to generate customer invoices.

- **WhatsApp Messaging Apps** – to send customer order confirmations.

- **Data Loader Tools** – for bulk import/export of supplier/customer records.