A CRM APPLICATION FOR WHOLESALE RICE MILL

Project Overview:

The Rice Mill CRM Application is a custom-built solution designed to streamline and enhance the day-to-day operations of a wholesale rice mill factory. It utilizes Salesforce's powerful CRM capabilities to track rice production, sales, and daily reports, all while optimizing customer and supplier relationships. The application aims to provide the mill owner with a clear overview of rice sold, production output, and revenue generation through automated reporting features.

Features and Functionality:

1. Reporting and Dashboards

   Generate daily reports, showing:

   Total rice produced

   Total rice sold

   Revenue generated

   These reports allow the owner to easily monitor the business's daily activities and make informed decisions on resource allocation and operational planning.

2. Rollup Summary Fields

   Rollup summary fields aggregate data from a child object to a parent object. In this application:

   Count, sum, and other functions (SUM, MIN, MAX) will be used to display the total value of rice supplies in relation to suppliers.

   Example: The total amount of rice supplied from each supplier will be summarized.

3. Cross-Object Formula Fields

   Cross-object formula fields calculate values by referencing fields from other objects in Salesforce:

   Example: A formula will calculate the total amount payable by multiplying the number of kilograms of rice supplied by the price per kilogram.

4. Validation Rules

   Validation rules ensure data accuracy by applying checks before data is saved:

   Example: The ISBLANK formula is used to ensure certain fields are filled, alerting users with an error message if they attempt to save a record with missing critical information.

5. Permission Sets & Role Hierarchy

Organization-Wide Defaults (OWD): Permissions are configured so that different user roles (e.g., owner, employer, and worker) can access records based on their needs:

The owner has full access to all records.

Employers can view both employer and worker records.

Workers have limited visibility into the relevant data.

Pre-Requisites:

A Salesforce Developer account.

Knowledge of Salesforce Admin concepts.

Two installed web browsers on your machine.

Stable internet connectivity.

Features:

1. Real-Time Salesforce Project Experience

This project provides hands-on experience in building a Salesforce CRM application tailored to the needs of a wholesale rice mill business.

2. Salesforce Features & Concepts

The project offers practical exposure to the following Salesforce concepts:

Object & Relationship Management

Understanding the relationship between different objects (e.g., rice orders, customers, suppliers).

Formula Fields & Validation Rules

Creating custom formulas and validation rules for maintaining data integrity.

Cross-Object Formula Fields

Calculating values from fields across objects for dynamic reporting.

Page Layouts

Designing and organizing how records appear in detail and edit pages.

Rollup Summary Fields

Aggregating data to display summaries from child records.

Reports & Dashboards

Creating dynamic reports and visual dashboards for real-time business insights

Salesforce is a comprehensive CRM platform designed to help businesses manage relationships with customers, automate workflows, and store data securely in the cloud. With standard products and customizable features, Salesforce allows you to manage your entire business from anywhere. Objects in Salesforce represent database tables where data is stored:

Standard Objects: Predefined objects like users, contacts, and reports.

Custom Objects: User-created objects that store unique information specific to the rice mill's operations (e.g., rice batches, customer orders).

- **Types of Salesforce Tabs**

  Custom Tabs: Used to display records for custom objects.

  Web Tabs: Display web content or applications embedded within Salesforce.

  Visualforce Tabs: Display Visualforce pages.

  Lightning Component Tabs: Used to add Lightning components in the mobile app.

- **The Lightning App**

  The application will be designed using Salesforce's Lightning Experience, offering a modern UI and seamless navigation. Users will access relevant objects, tabs, and custom functionalities within the app.

- **Profiles & Permission Sets**

  Profiles control what users can access within Salesforce. This project involves setting up customized profiles for the rice mill factory's roles. Permission sets extend the access given to specific users without altering their profiles.

- **Dashboards**

  Dashboards will provide visual insights into sales performance and production output, helping mill owners quickly identify trends and make decisions based on real-time data.

- **Apex Programming**

  Apex, Salesforce's native programming language, will be used to implement custom business logic. Apex's object-oriented nature (similar to Java) allows you to manage system events, button clicks, and Visualforce pages for this project.

The Rice Mill CRM Application is a tailored solution for rice mill owners to better manage production, sales, and customer relationships. Leveraging Salesforce's robust CRM capabilities, the application offers an efficient, user-friendly experience for all involved, from the workers to the mill owner.