A CRM APPLICATION FOR WHOLESALE RICE MILL

Report

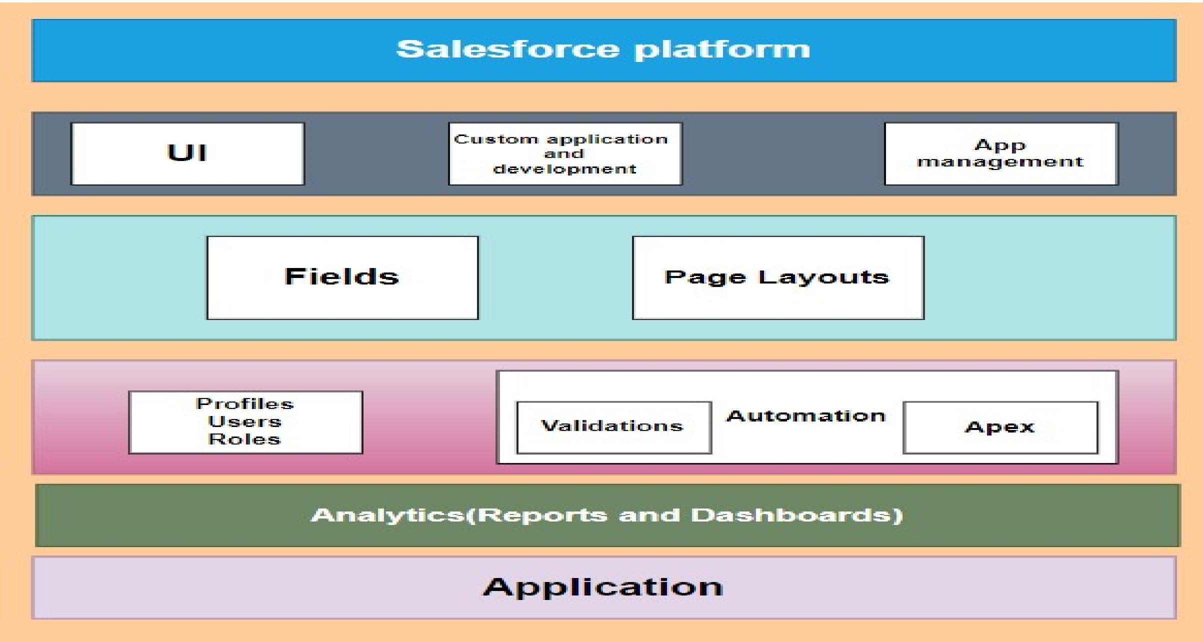
Short Description:

The Rice Mill Crm Streamlines Daily Rice Production and Sales Reporting,Enhancing Efficiency and Customer Experiences.

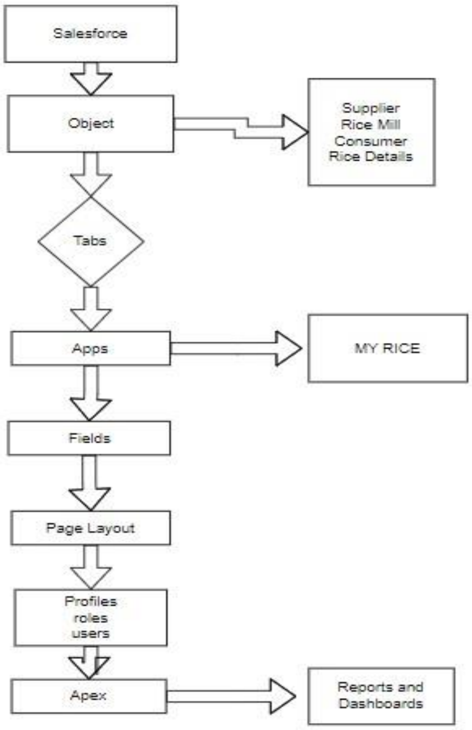
Long Description:

The Rice Mill CRM Application is a comprehensive solution designed to streamline and simplify how much rice per day,how many were sold that rice and which type of rice all reports send to owners daily wise. It leverages the power of customer relationship management (CRM) to enhance customer experiences, optimize store operations, and improve overall efficiency in the rice mill factory. This project aims to develop a user-friendly and feature-rich application that addresses the specific needs of a rice mill factory.

Technical Architecture:



Project Flow:



Features and Functionality:

Reports and Dashboards:: The application can generate detailed reports and analytics regarding daily how much rice sold and total income per daily, revenue generated, popular amenities, and most buyed customers. Easy to understand the data to the owner, improving resource allocation, and planning future development.

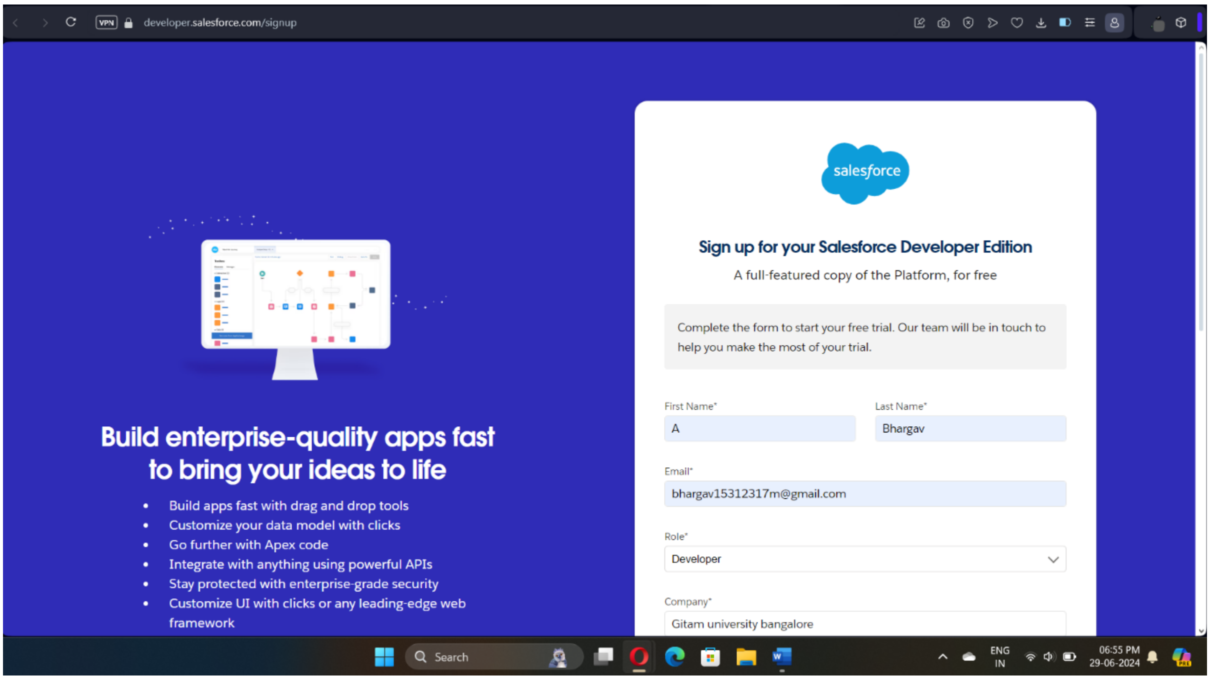
Roll Up Summary Field: This is a field that summarizes data from a child object to a parent object that shares a master-detail relationship. Rollup summary fields can use the COUNT, SUM, MIN, and MAX functions. For example, you could use a rollup summary field to display the total value (amount of rice supplied) from rice details on a related supplier.

Cross Object Formula: It is a formula field that references fields from another object in Salesforce. This type of formula allows users to calculate the total amount from number of rice taken*price/kg and it displays the total amount I have to pay.

Validation Rule: Validation rules also include an error message to display to the user when the rule returns a value of "True" due to an invalid value.so , In this project i gave Isblank formula.Isblank formula is used to verify whether it is blank it shows error.

Permission sets:: Organization Wide Defaults(OWD) in salesforce is the baseline level of access that the most restricted user should have. Organizational Wide Defaults are used to restrict access.But in our case we created roles and given the roles in such a way that the owner can see   employer and worker records , and the employer can see the worker records.

Activity 1: Creating Developer Account:

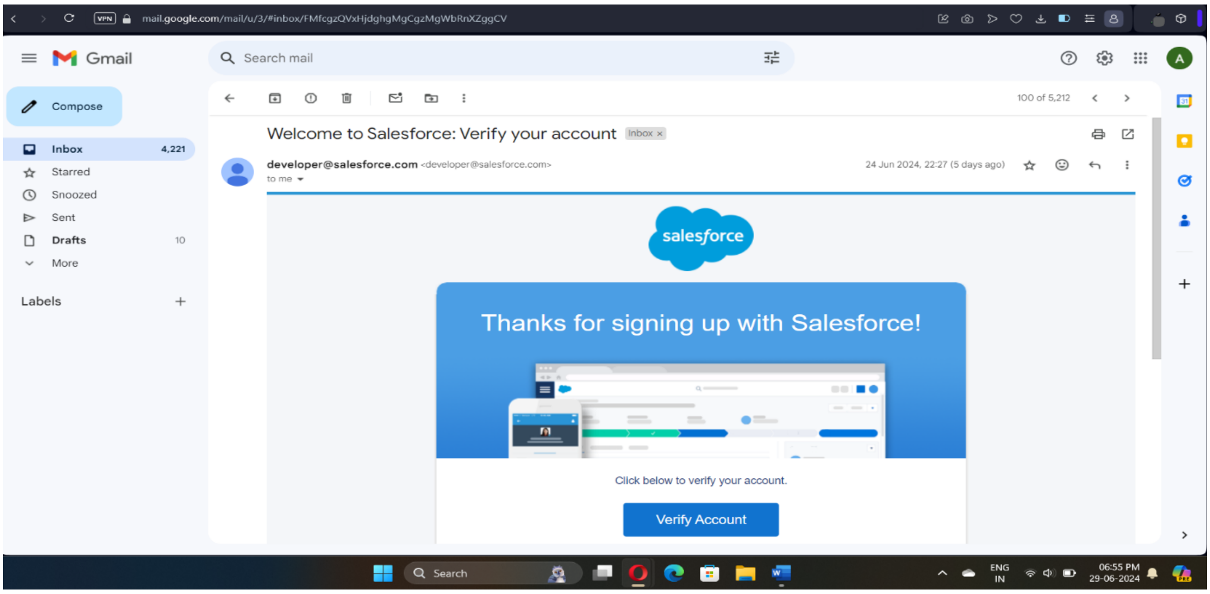


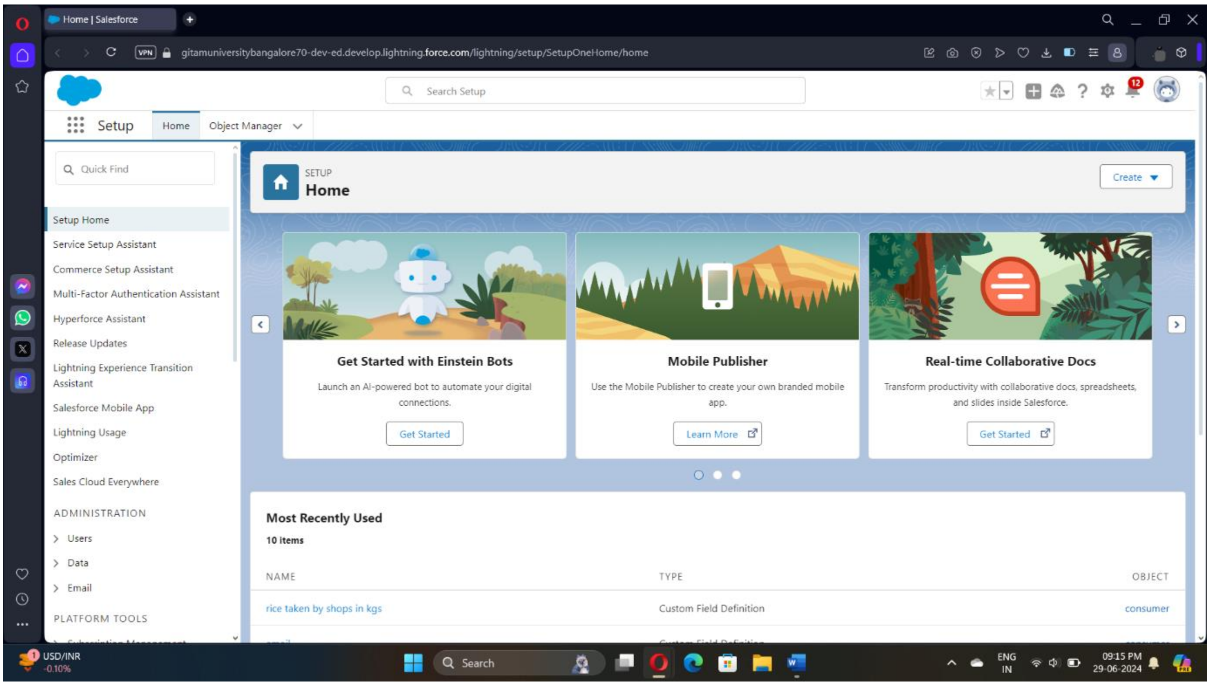
1) First name & Last name : A Bhargav
2) Email : bhargav15312317m@gmail.com
3) Role : Developer
4) Company : Gitam university bangalore
5) County : India
6) Postal Code : 560036

7) Username : bhargav300502@gmail.com

Activity 2: Account Activation:

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.
2. Click on Verify Account
3. Give a password and answer a security question and click on change password.
4. Then you will redirect to your salesforce setup page.



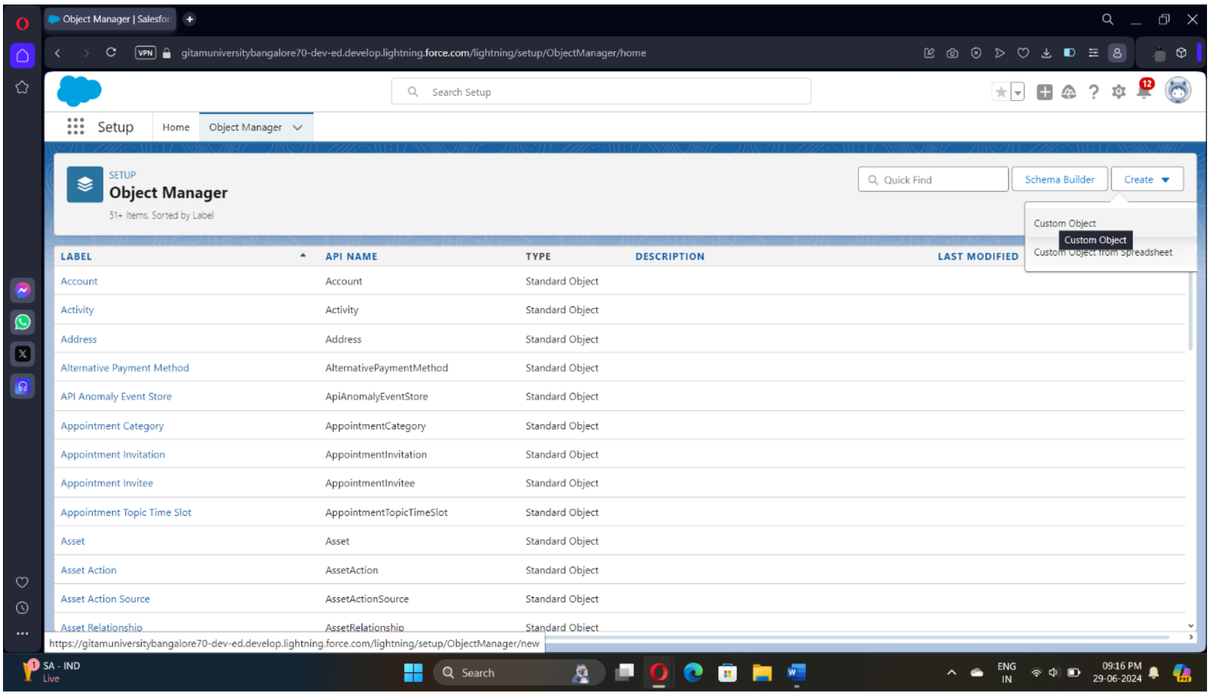


Milestone 2- Object

To Navigate to Setup page:

Click on gear icon → click setup.

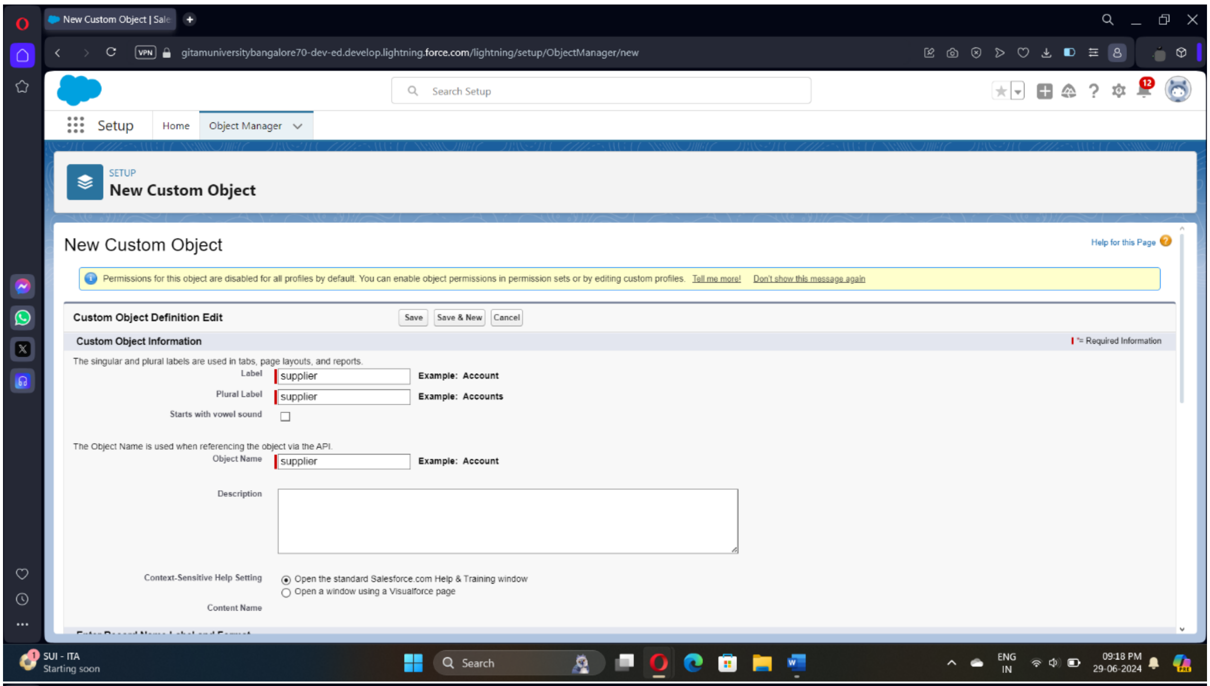
1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.

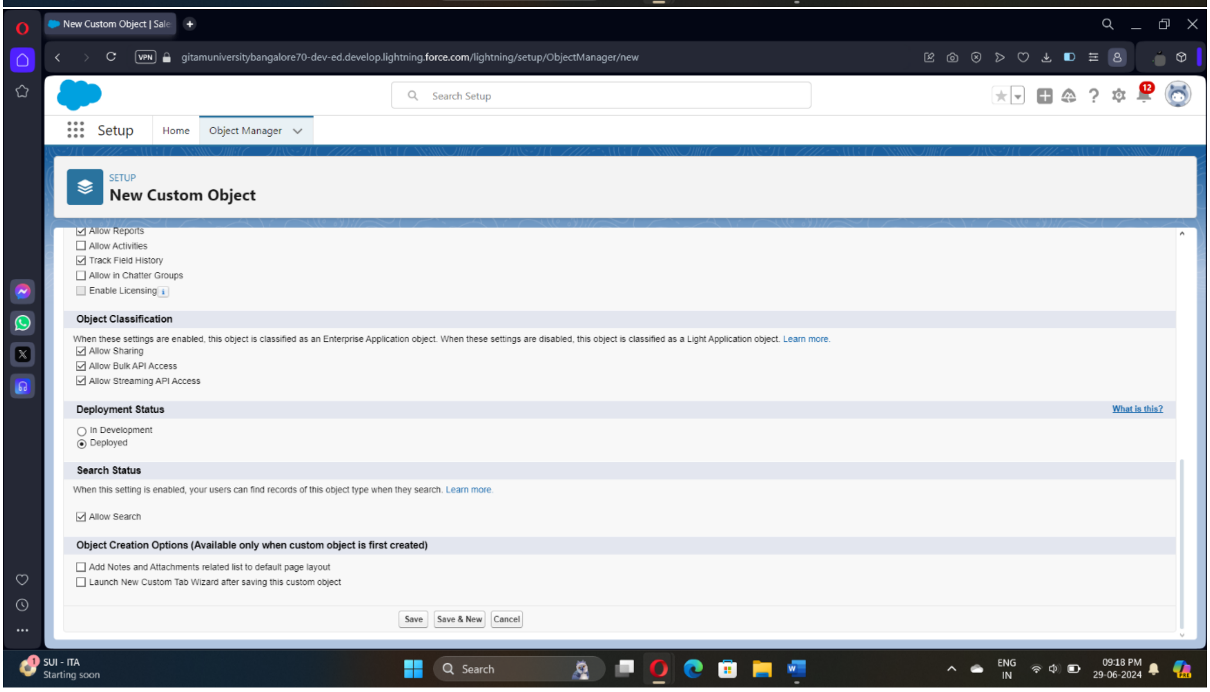


Activity 1: Create Supplier Object:

To create an object:

1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
   1) Enter the label name→ **supplier**
   2) Plural label name→ supplier
   3) Enter Record Name Label and Format
      - Record Name → supplier Name
      - Data Type → Text
2. Click on Allow reports and Track Field History and allow search
3. Allow search → **Save.**





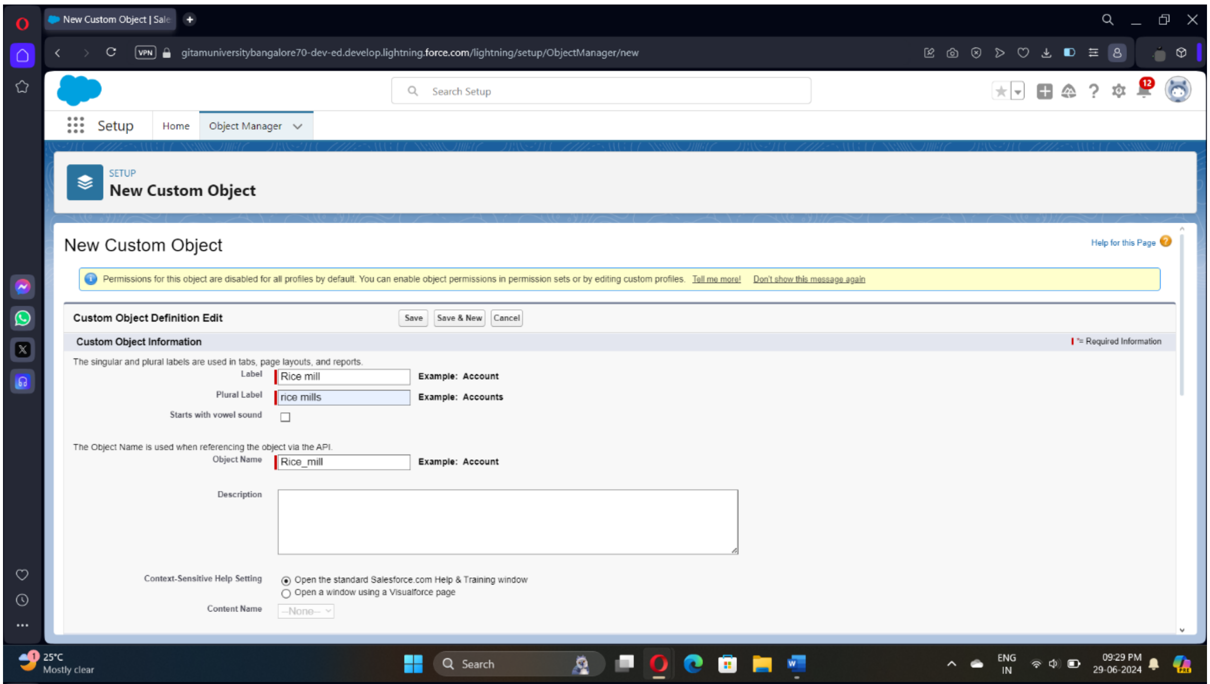
Activity 2: Create Rice mill Object:

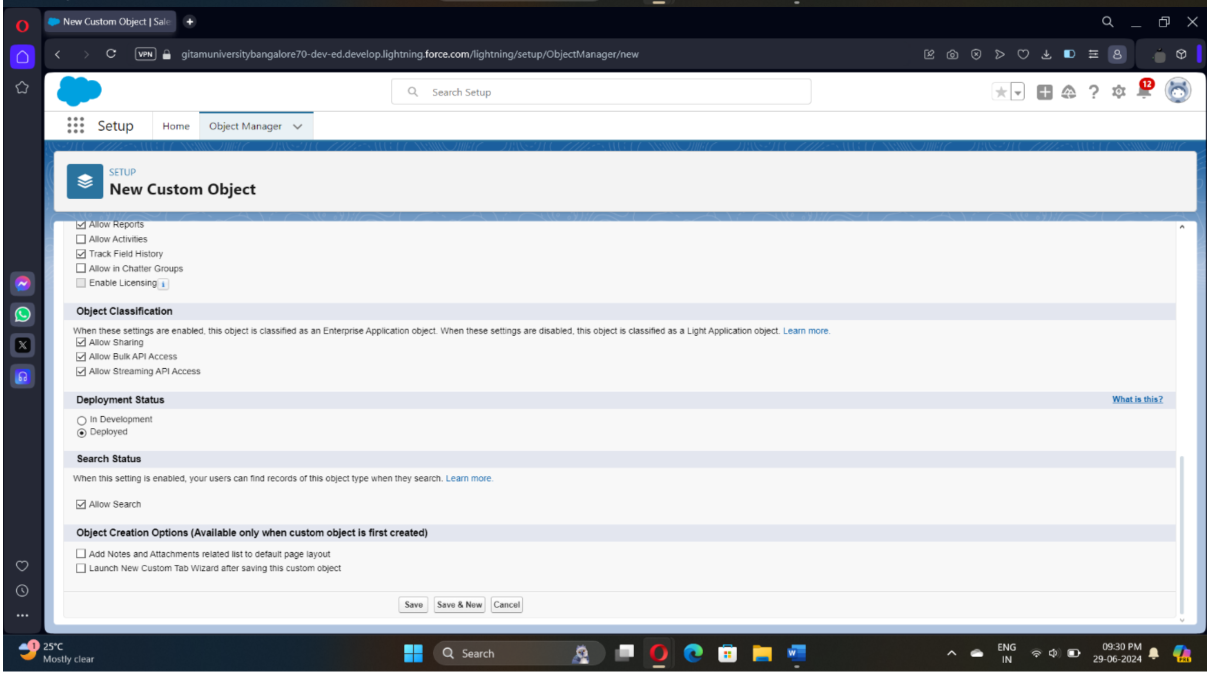
To create an object:

1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
    1) Enter the label name→ rice mill
    2) Plural label name→ rice mills
    3) Enter Record Name Label and Format
        - Record Name →
        - Data Type → Auto Number
        - Display Format → rice-{000}

- Starting number → 1

2. Click on Allow reports and Track Field History, Allow Search.
3. Allow search → **Save.**

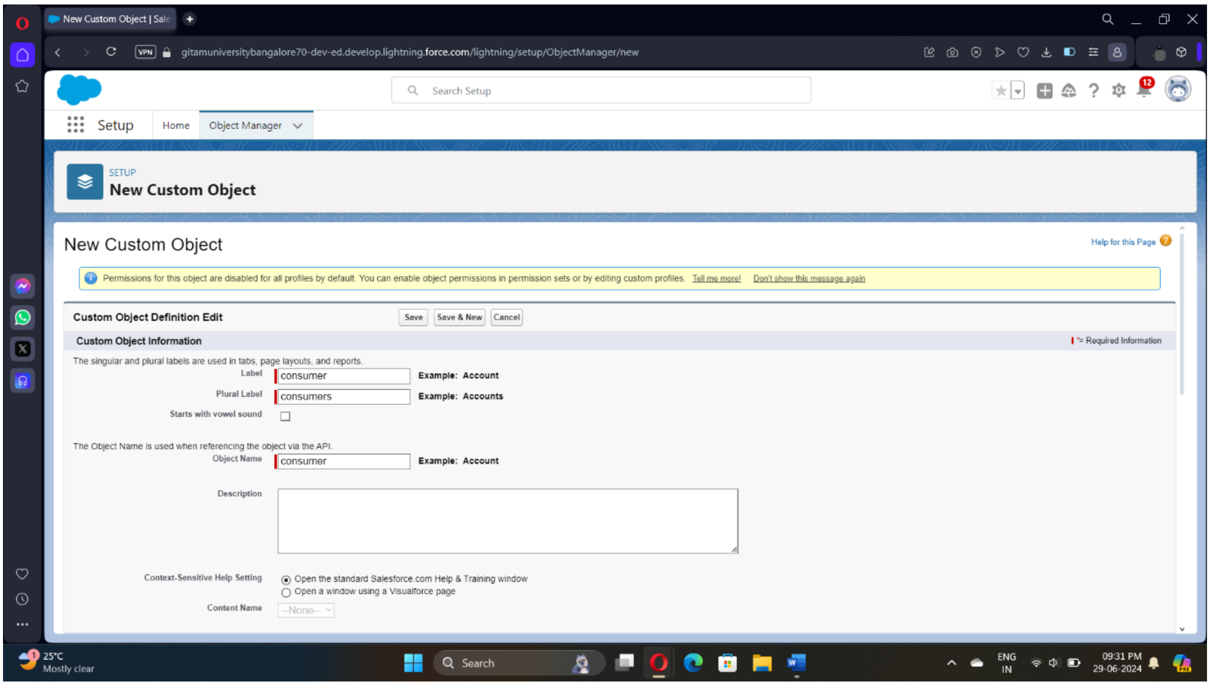


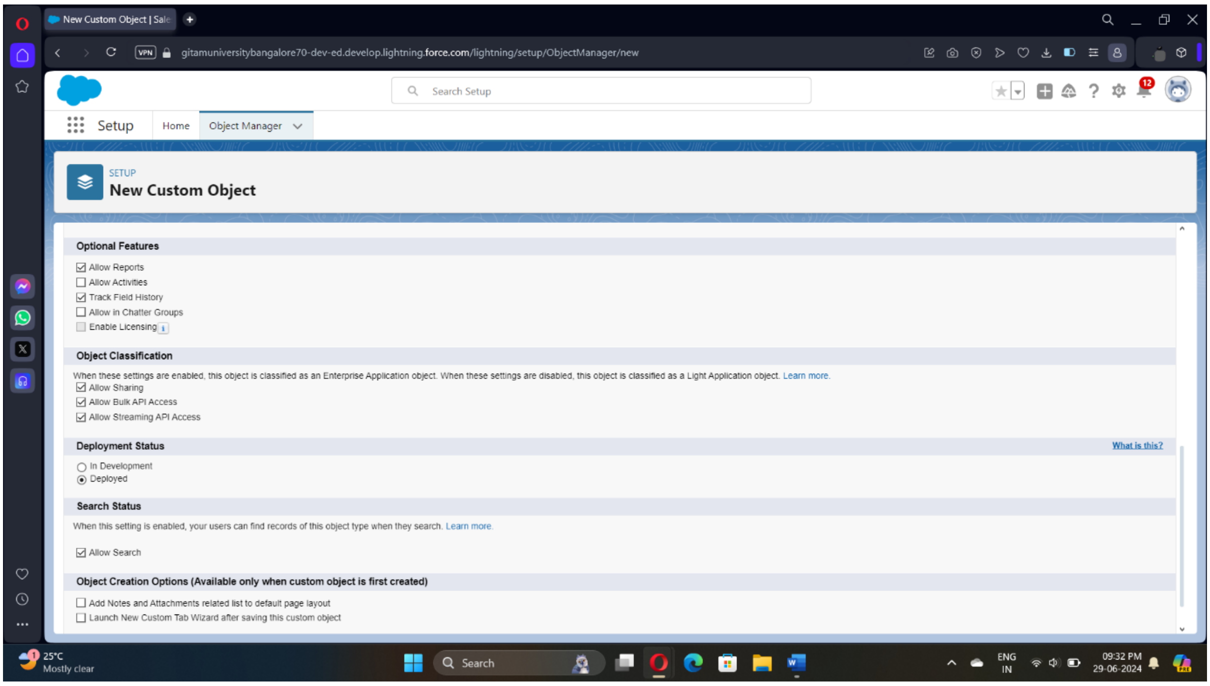


Activity 3: Create consumer Objects:

Note: Follow the same steps as mentioned in Activity 2 for the   and Receipt objects.

1. Use these display format for the **consumer**
    - label name → **consumer**
    - Plural label name → **consumers**
    - Display Format → **consumers**-{000}
    - Starting number → 1

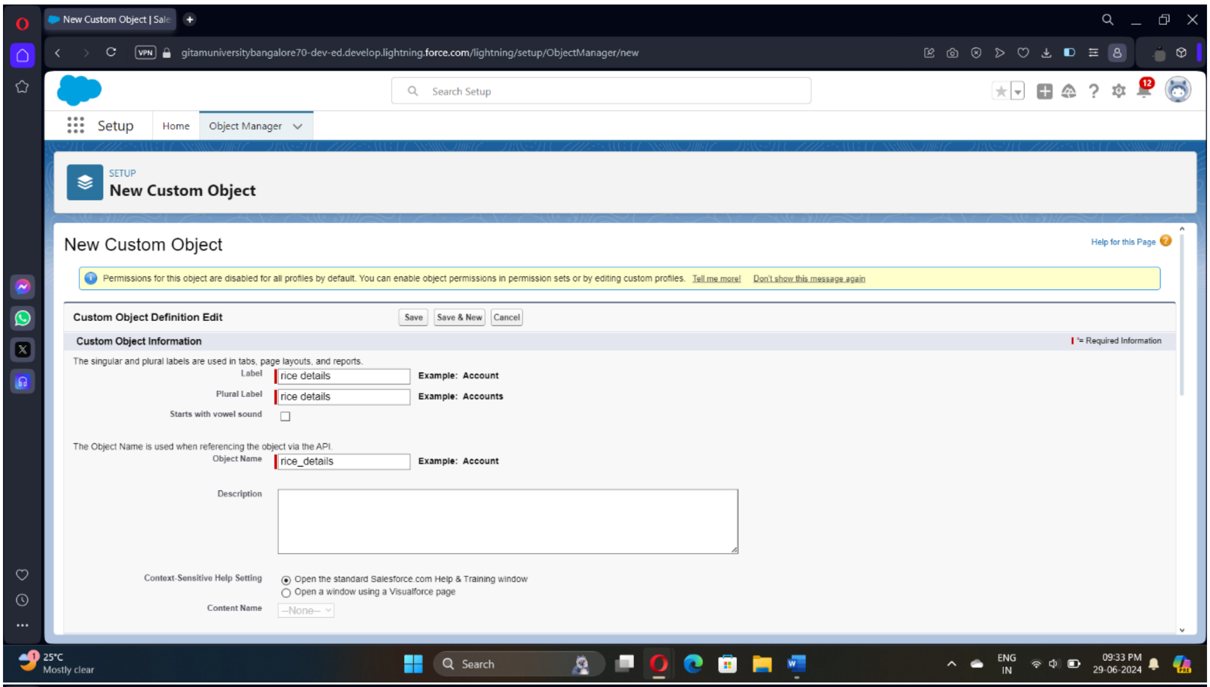


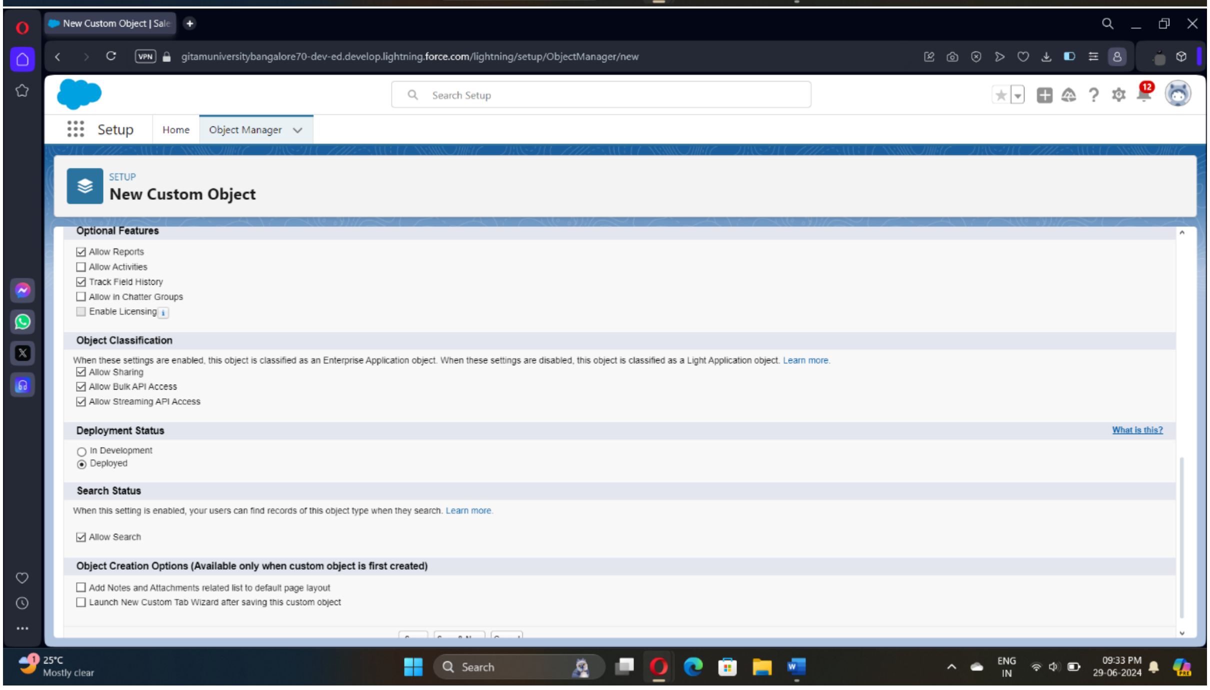


Activity 4: Create rice details Objects:

2. Use these display format for the rice details
   - label name → rice details
   - Plural label name → rice details
   - Display Format → rice-{000}

Starting number → 1



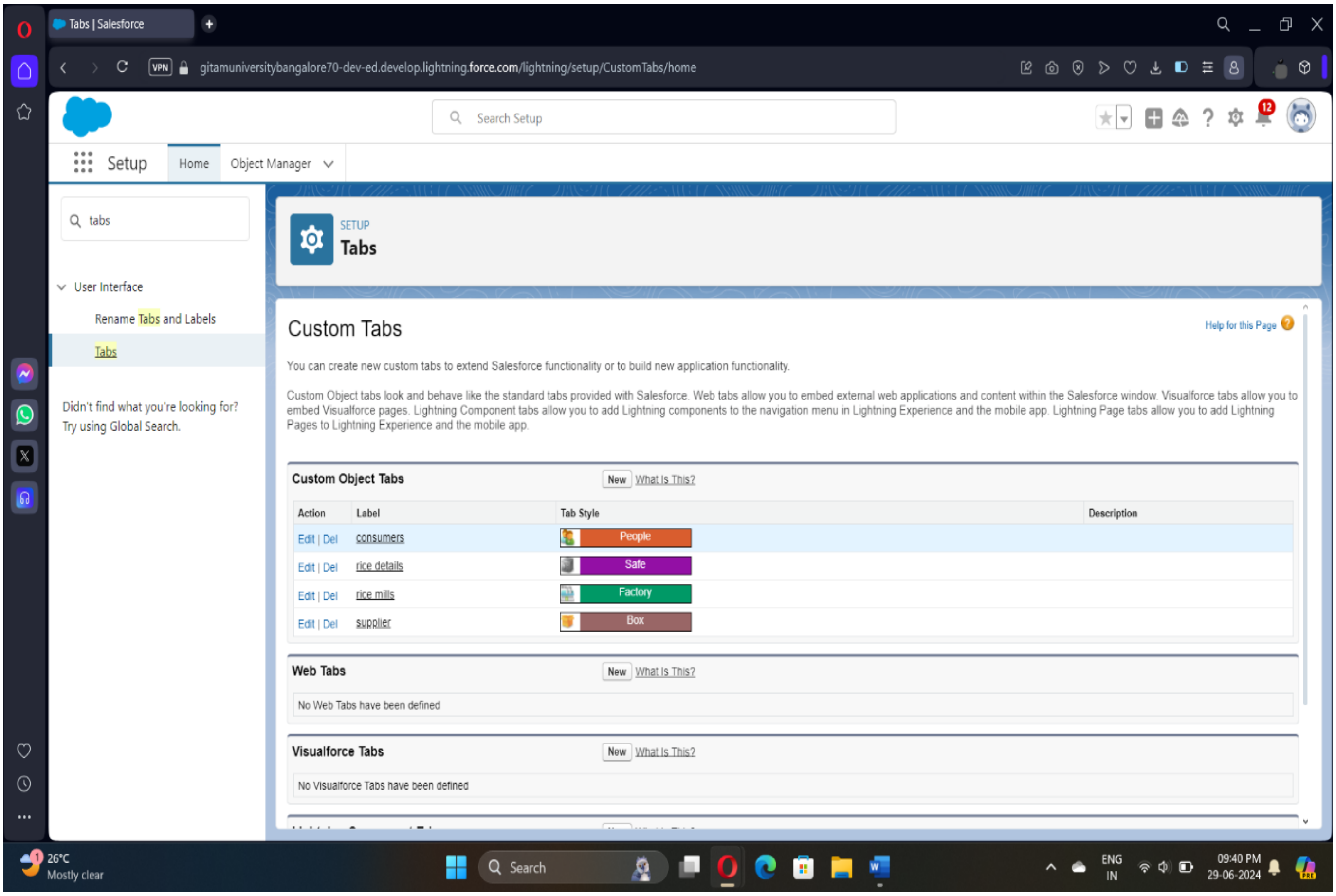


Milestone 3- Tabs

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. Select Object(supplier) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.

Activity 2: Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are " rice mill, **consumer** , rice details".
2. Follow the same steps as mentioned in Activity -1 .



<u>Milestone 4- The Lightning App:</u>

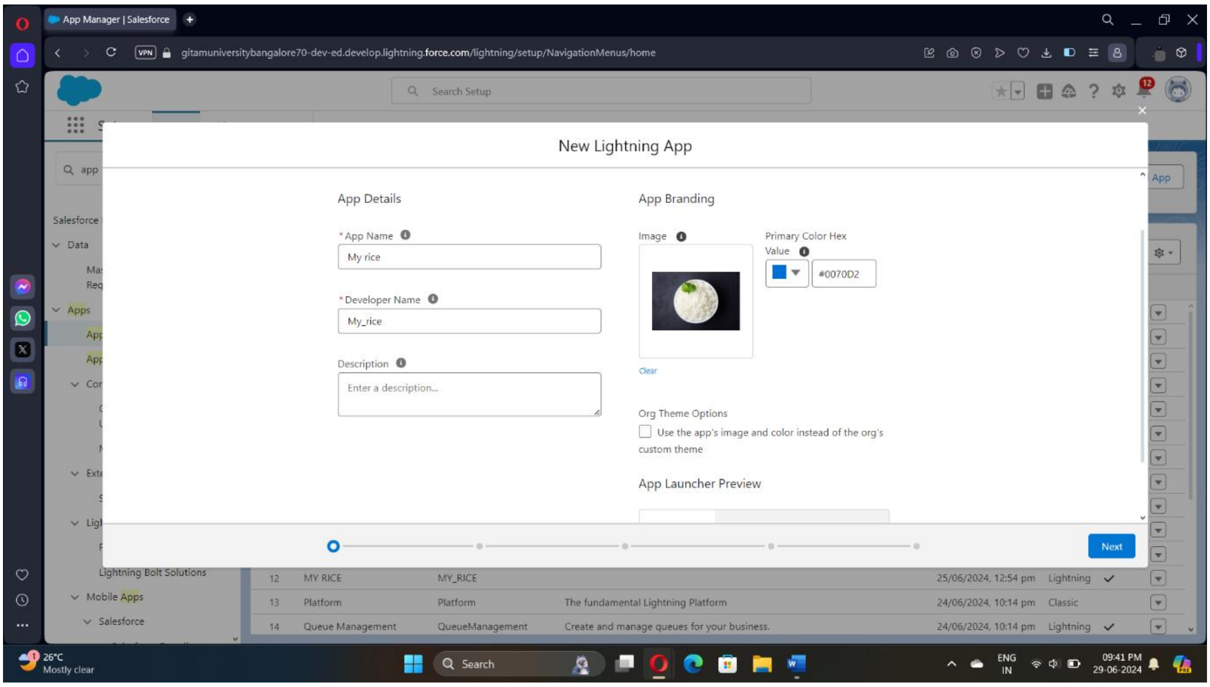
Activity 1: Create a Lightning App

To create a lightning app page:

1. Go to setup page → search “app manager” in quick find → select “app manager” → click on New lightning App.

2. Fill the app name in app details as MY RICE →Next → (App option page) keep it as default → Next → (Utility Items) keep it as default → Next.
3. Upload a photo that is related to your app.
4. To Add Navigation Items:
5. Select the items (supplier, rice mill, consumer , Rice details) from the search bar and move it using the arrow button → Next.
6. To Add User Profiles:

Search profiles (System administrator) in the search bar → click on the arrow button → save & finish.

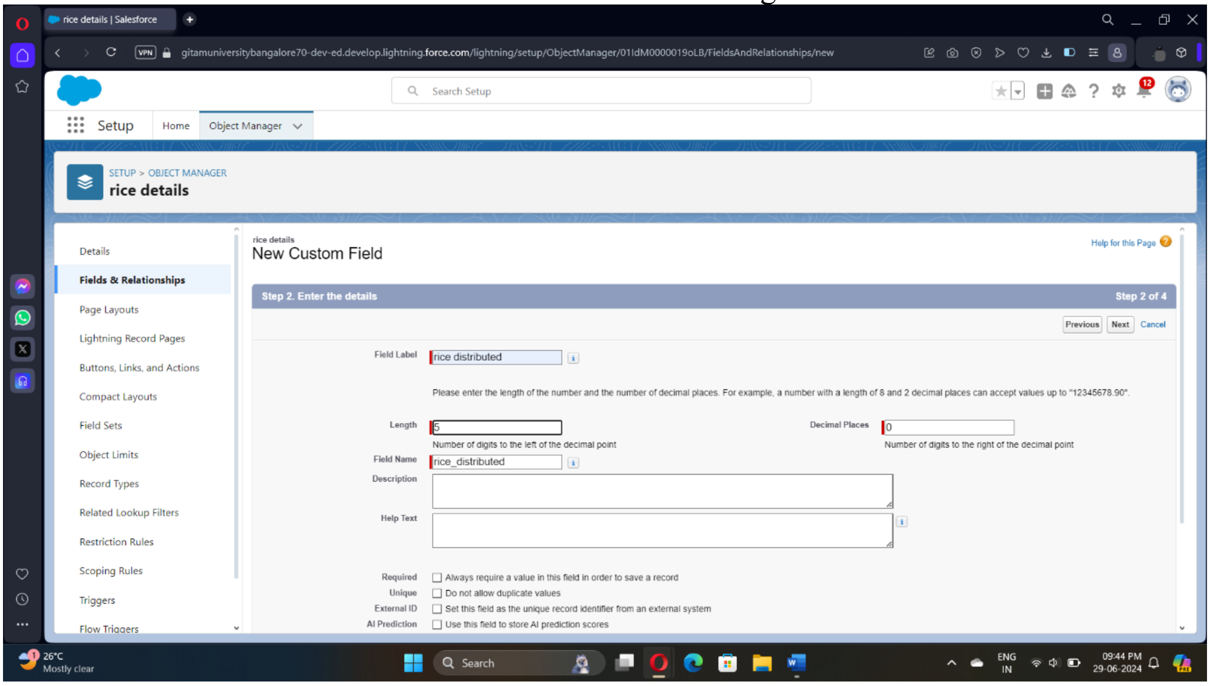


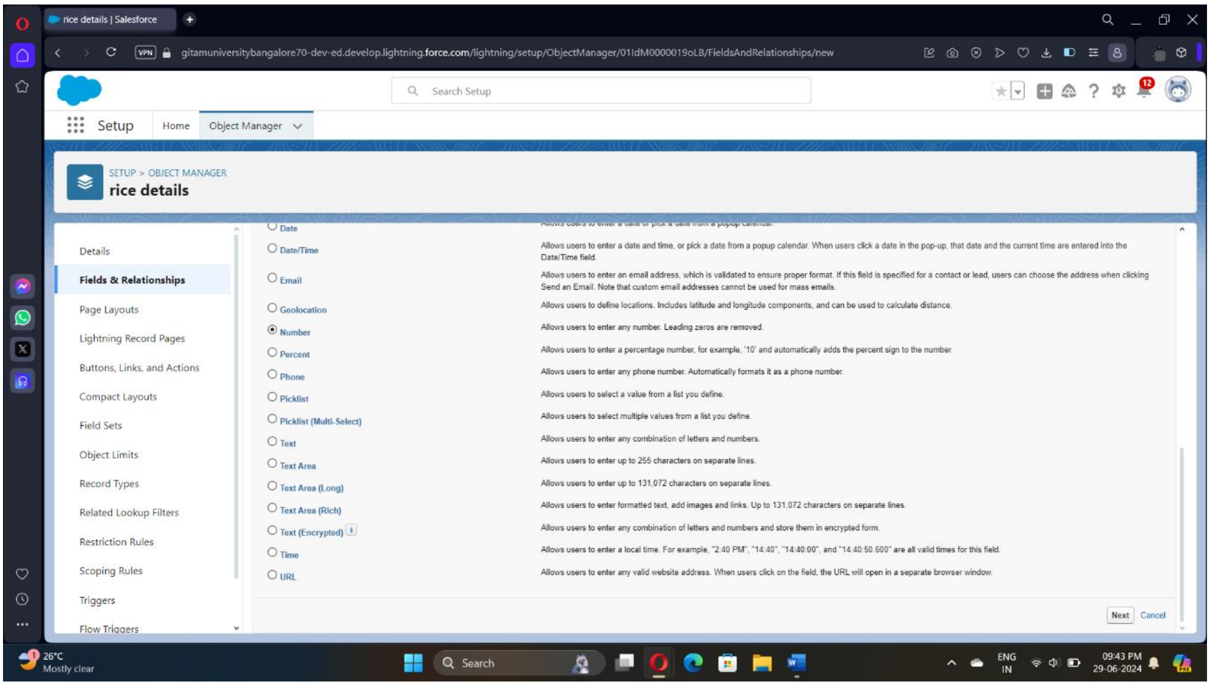
Milestone 5 : Fields

Activity 1: Creating the number field in rice details object

Creating the number field in rice details object

1. Go to the setup page → click on object manager → From drop down click edit for rice details object.
2. Click on fields & relationship → click on New.
3. Select Data type as "Number" and click Next.
4. Given the Field Label as " rice distributed " and length as " 5 ".





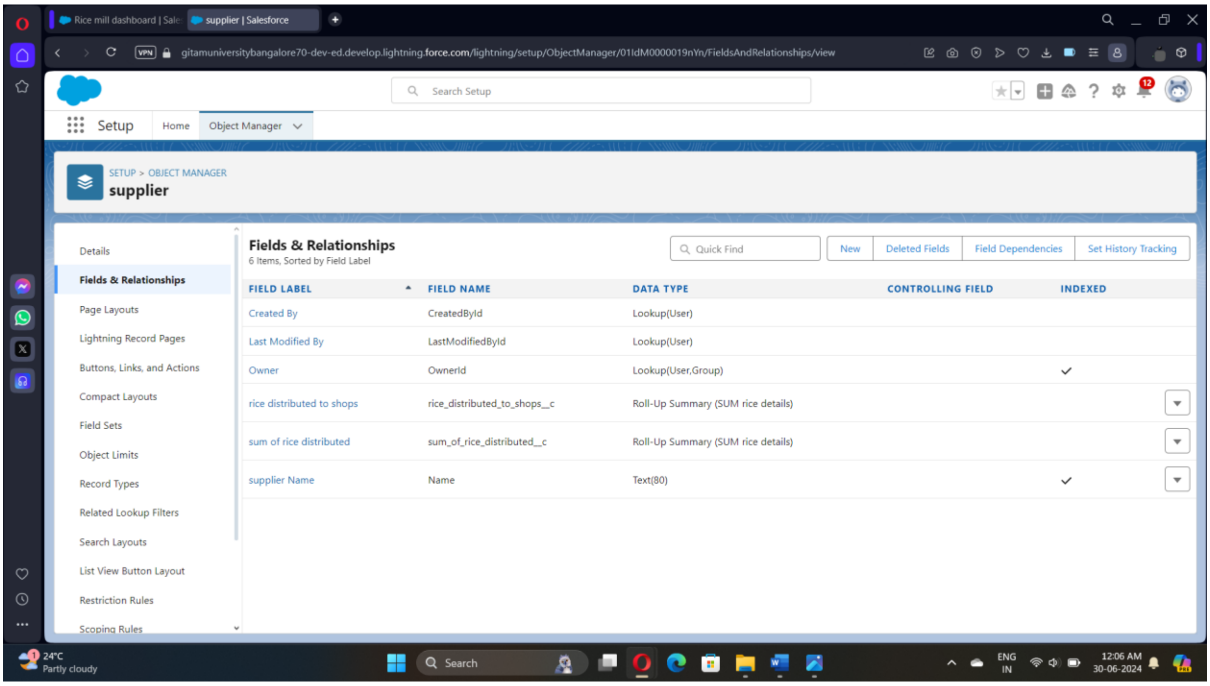
Activity 2 : Creating Junction Object :

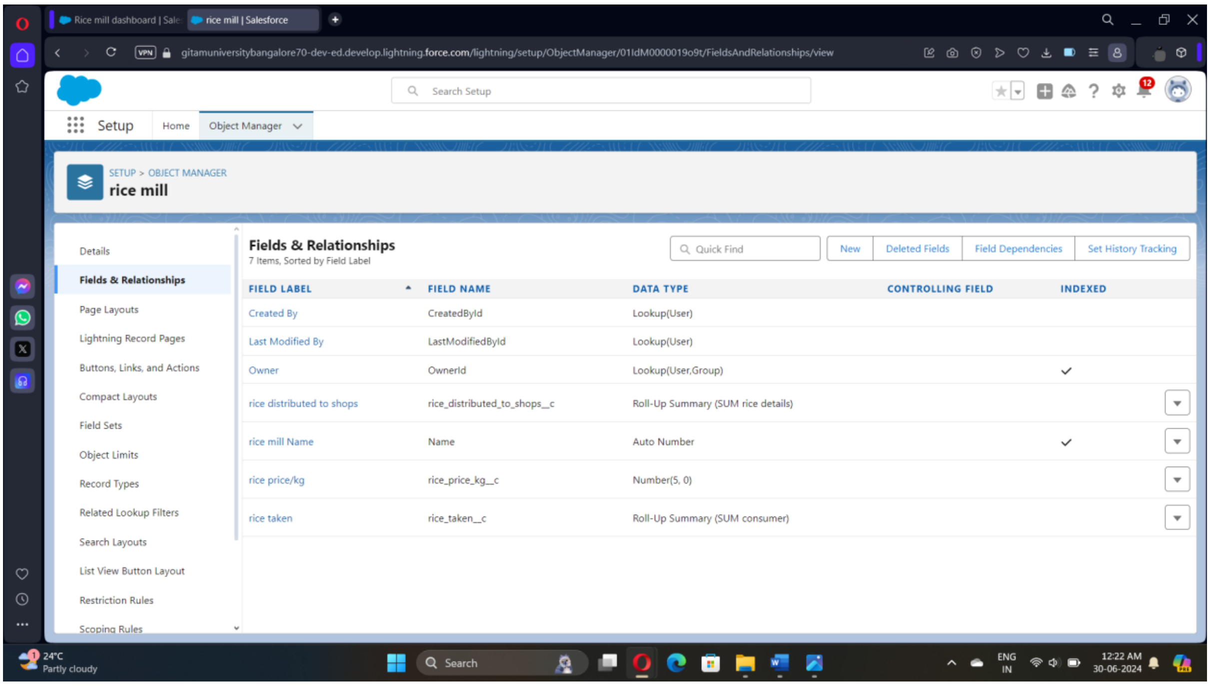
A Junction object is a custom object that serves as a bridge between two related objects in a many-to-many relationship. It allows you to create a relationship between records of two different objects by creating a many-to-many relationship model.

Creating junction object as rice details with supplier & rice mill

To create junction object

1. Go to the setup page → click on object manager → From drop down click edit for rice details object.
2. Click on fields & relationship → click on New.
3. Select "Master-Detail relationship" as data type and click Next.
4. Select the related object " supplier " and click next.
5. Give Field Label as "supplier Name" and click Next.
6. Next → Next → Save & New.
7. Follow the same steps from 1 to 3.
8. Select the related object " rice mill " and click Next.
9. Give Field Label as "rice mill 1(one)" and click Next.
10. Next → Next → Save.





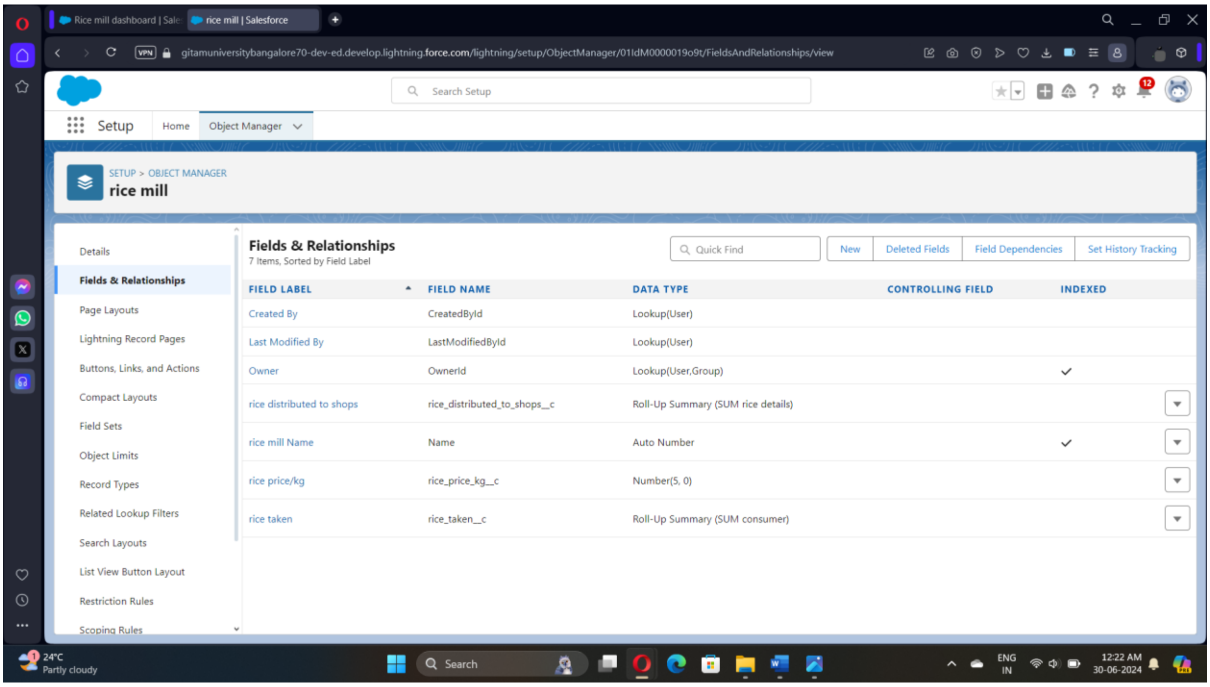
Activity 3 : Creating a Master-Detail Relationship

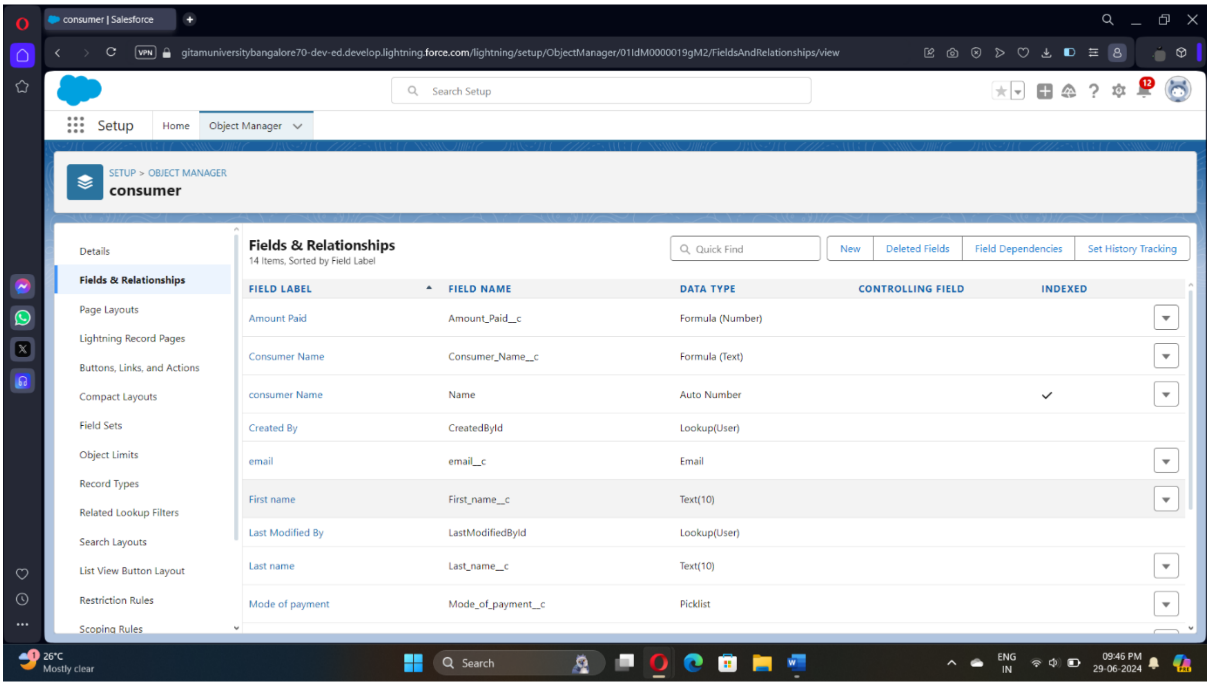
Creating Master-Detail Relationship between consumer & rice mill Object

To Create a Master-Detail relationship

1. Go to the setup page → click on object manager → From drop down click edit for consumer object.
2. Click on fields & relationship → click on New.
3. Select "Master-Detail relationship" as data type and click Next.
4. Select the related object " rice mill".
5. Give Field Label as "rice mill name" and click Next.

6. Next → Next → Save.

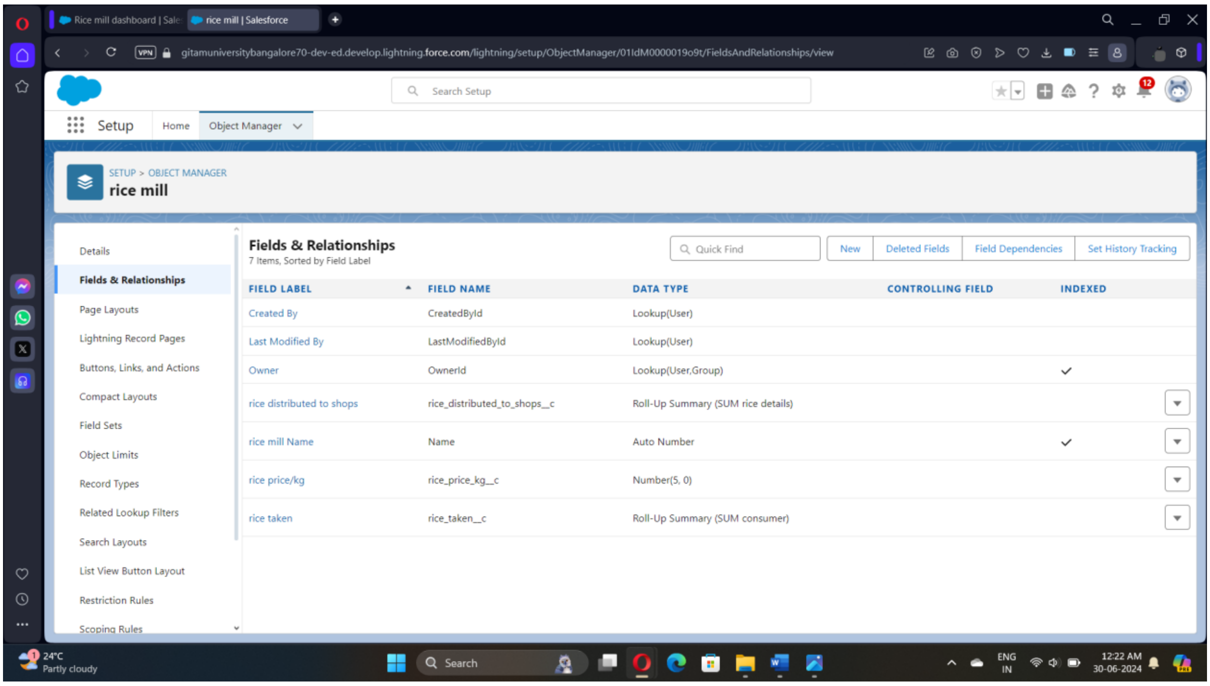


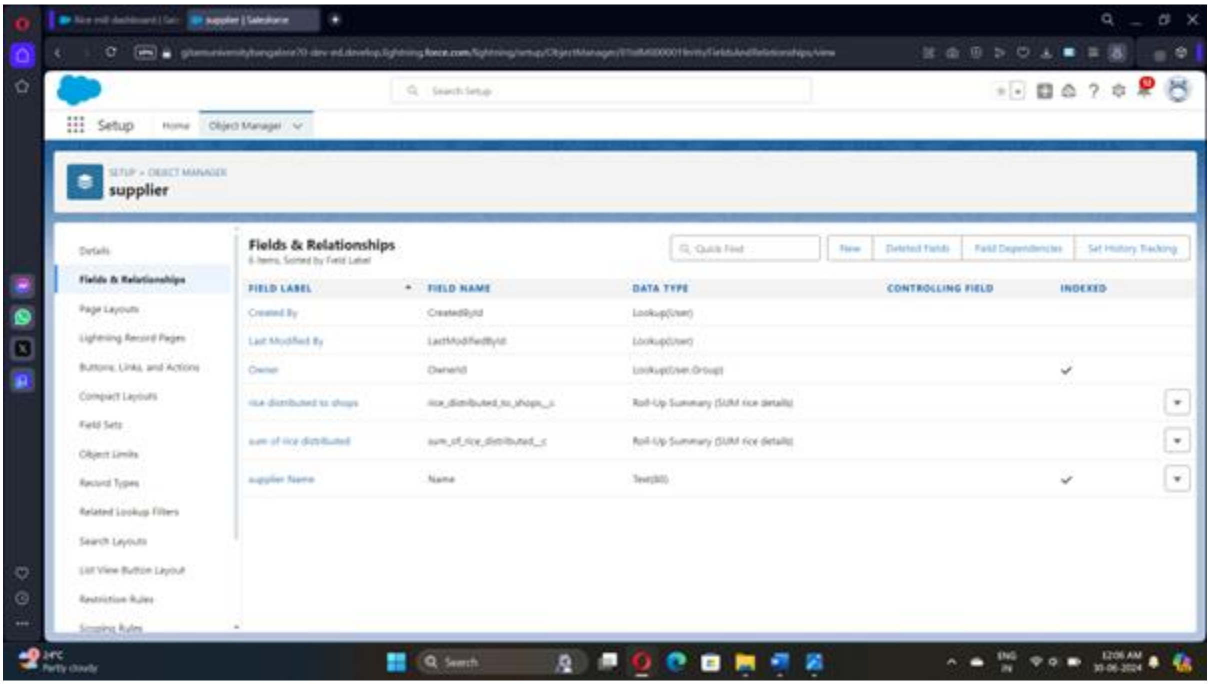


Activity 4 : Creating the Roll-up Summary

Creating the Roll-up summary field on supplier & rice mill Objects.

1. Go to setup → click on Object Manager → type object name(supplier) in search bar → click on the object.
2. Now click on "Fields & Relationships" → New
3. Select the data type as "Rollup summary ",and click Next.
4. Give the Field label as " sum of rice distributed ",Field Name will be Auto generated, and click Next.
5. Select the summarized object as " rice details ".
6. Select the Rollup type as "sum".
7. Select the field to aggregate as " rice distributed ", and click Next → Next → Save.
8. Follow the same steps for the rice mill Object from 1 to 3
9. Give the Field label as " rice distributed to shops ",Field Name will be Auto generated, and click Next.
10. Select the summarized object as " rice details ".
11. Select the Rollup type as "sum".
12. Select the field to aggregate as " rice distributed ", and click Next → Next → Save.
13. **Note :** create the field as " rice taken by shops in kgs" using number datatype in consumer object
14. Follow the same steps for the rice mill Object from 1 to 3
15. Give the Field label as " rice taken ",Field Name will be Auto generated, and click Next.
16. Select the summarized object as " consumer".
17. Select the Rollup type as "sum".
18. Select the field to aggregate as " rice taken in shops ", and click Next → Next → Save.

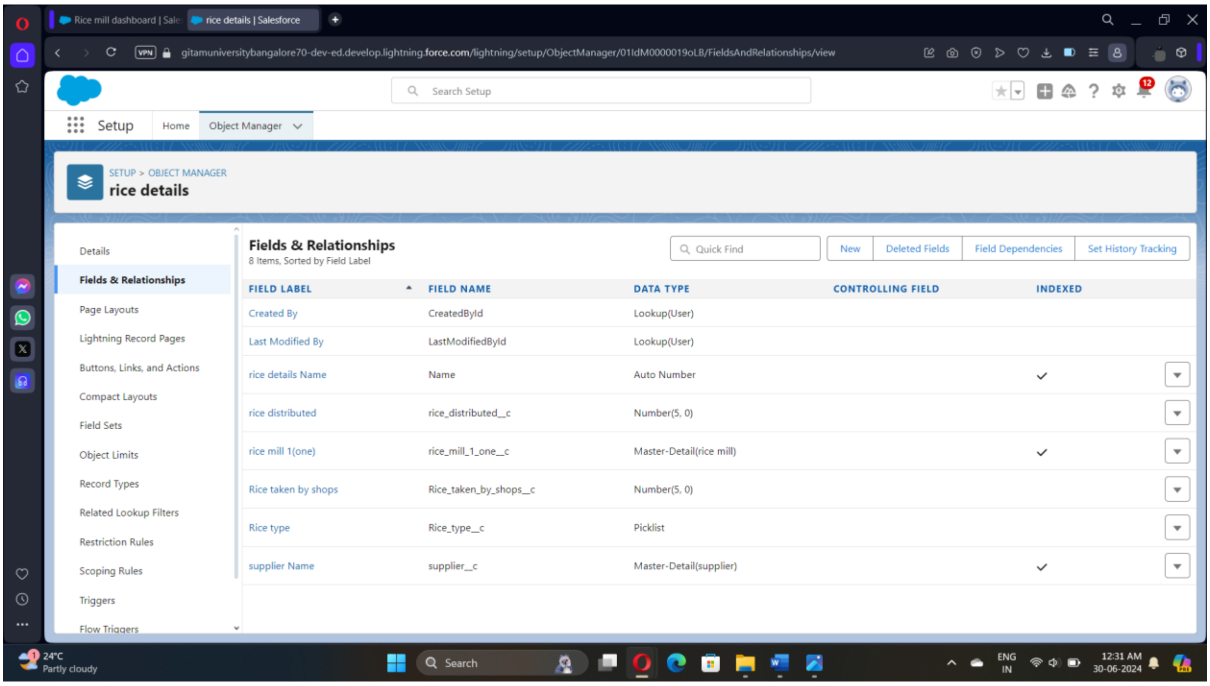




Activity 5 : Creating Fields in Objects

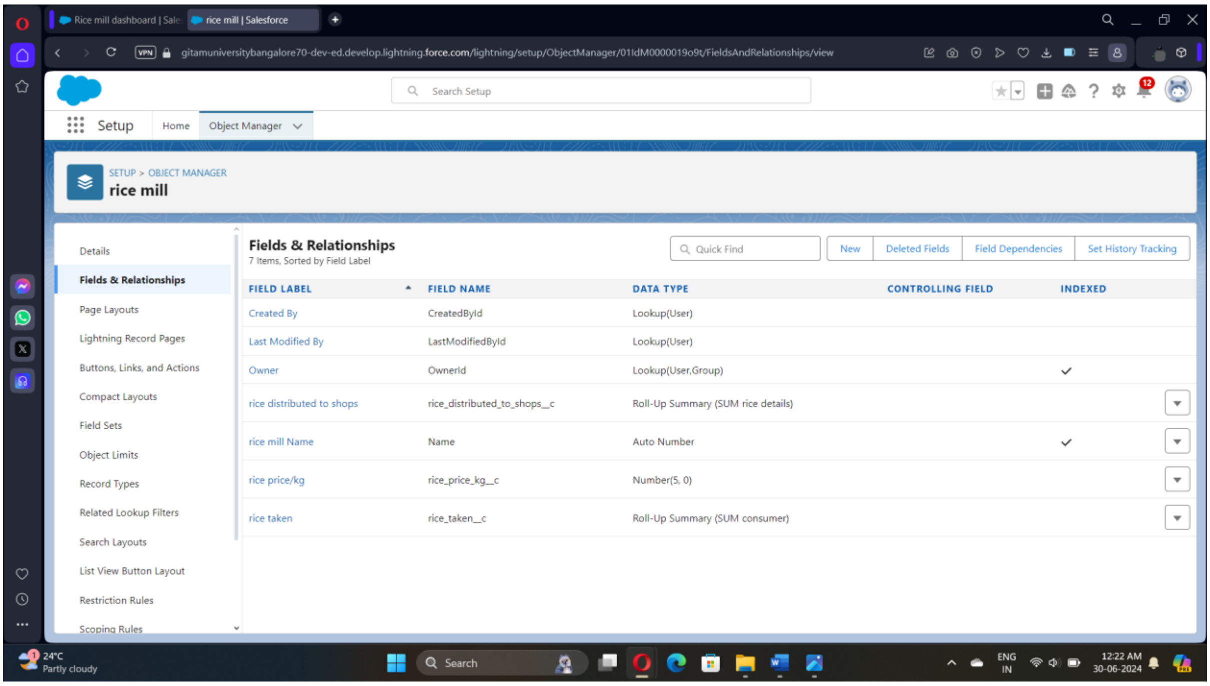
Creating the number field in rice details object

1. Go to the setup page → click on object manager → From drop down click edit for rice details object.
2. Click on fields & relationship → click on New.
3. Select Data type as “Number” and click Next.
4. Given the Field Label as “ supplier name ” and length as “ 5 ”.
5. Field Name will be auto populated, and click on Next→ Next → Save.

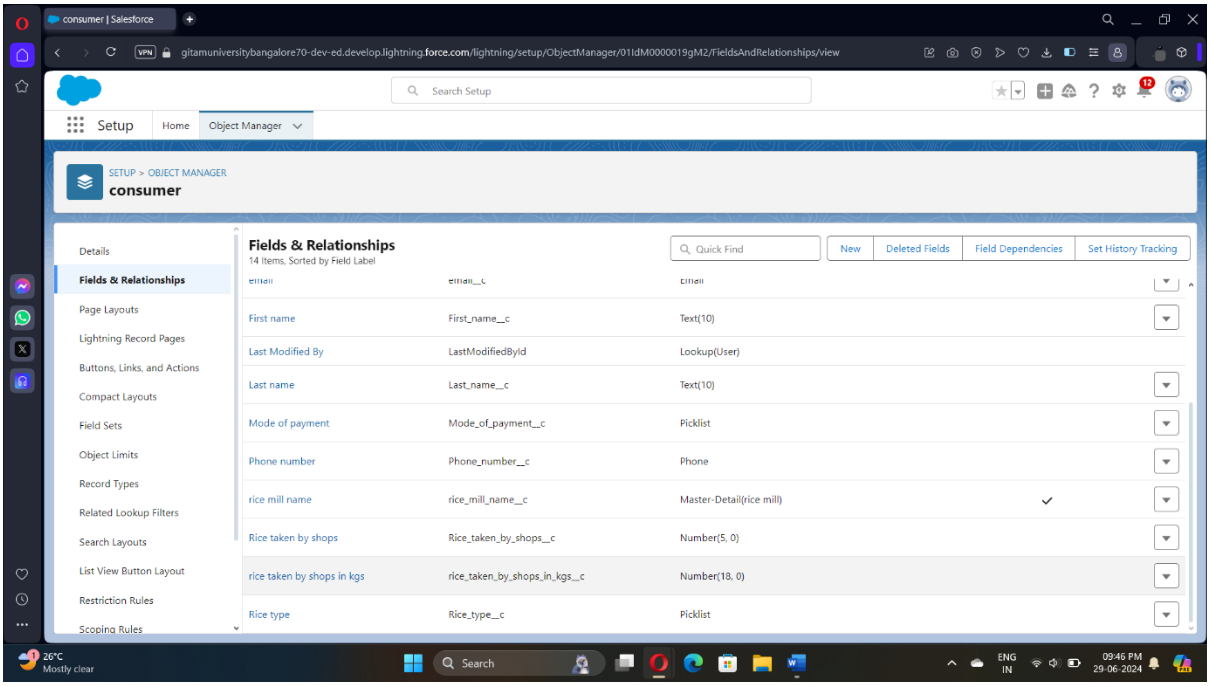


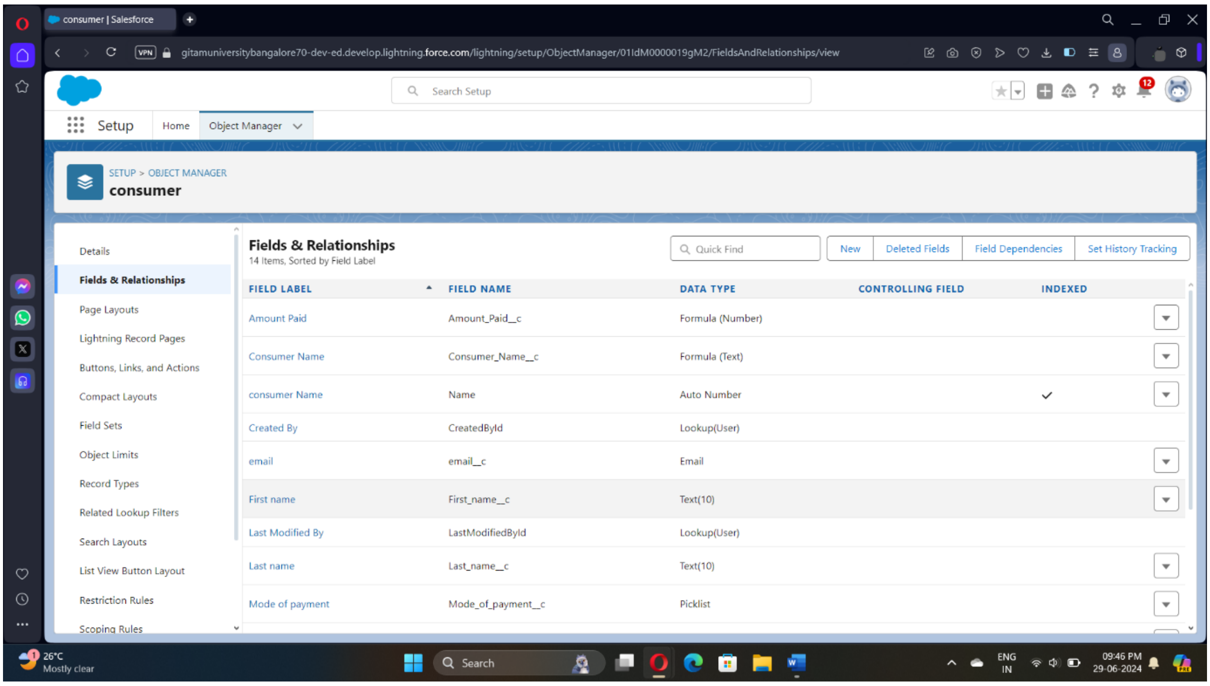
Activity 6: Creating Fields in rice mill Objects

1. Select Data type as “Number” and click Next.
2. Given the Field Label as “ rice price/kg ” and length as “ 5 ”



Activity 7: Creating Fields in consumer Objects





Activity 8 : Creating Cross Object Formula Field in consumer Object

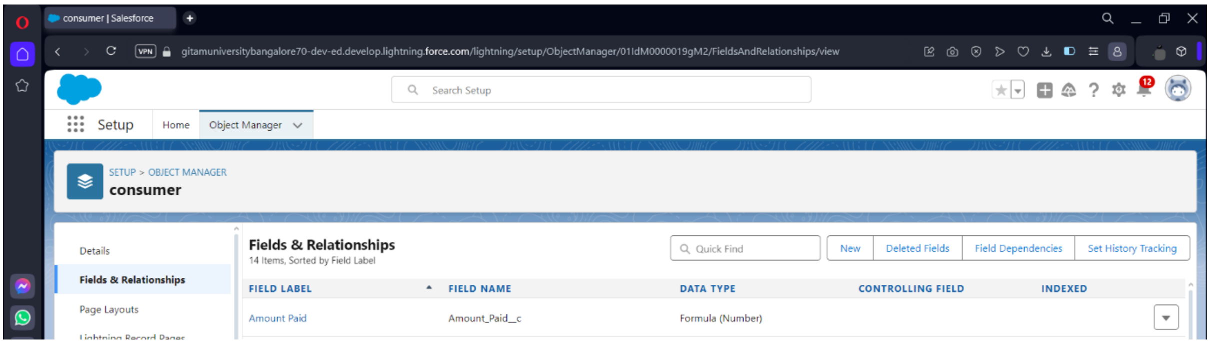
1. Go to setup → click on Object Manager → type object name(consumer) in search bar → click on the object.
2. Click on fields & relationship → click on New.
3. Select Data type as “Formula” and click Next.
4. Give Field Label and Field Name as “Amount Paid ” and select formula return type as “Number” and click next.
5. Insert fields formula should be :

rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c

6. Under Advanced Formula write down the formula and click “Check Syntax” and Save.

Creating the Formula field in consumer Object

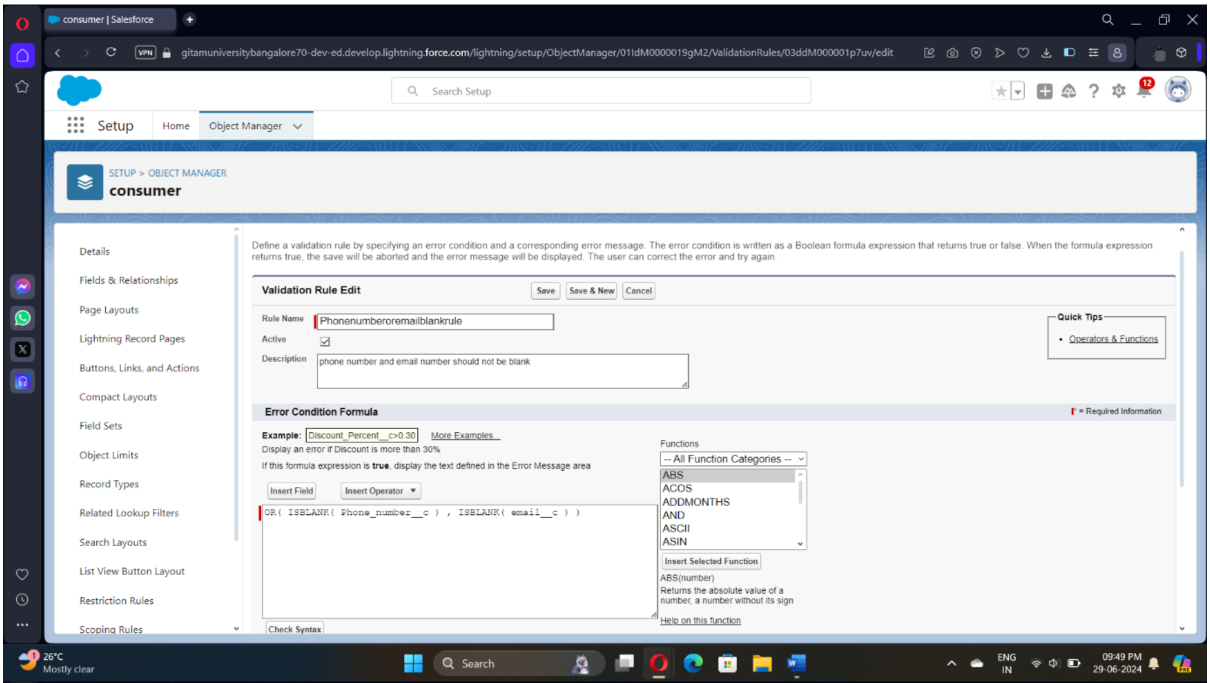
7. Go to setup → click on Object Manager → type object name(consumer) in search bar → click on the object.
8. Click on fields & relationship → click on New.
9. Select Data type as “Formula” and click Next.
10. Give Field Label and Field Name as “Consumer Name” and select formula return type as “TEXT” and click next.
11. Insert field formula should be : First_Name__c + ' ' + Last_Name__c
12. click “Check Syntax” and Save.



Activity 9 : Creating the validation rule

Creating the validation rule for phone number field in consumer object

1. Go to the setup page → click on object manager → From drop down click edit for consumer object.
2. Click on the validation rule → click New.
3. Enter the Rule name as “Phonenumberoremailblankrule ”.
4. Enter the description as “phone number and email number should not be blank”.
5. Enter the formula as “OR(ISBLANK(phone_number__c) , ISBLANK(email__c))” and check the syntax.
6. Under the error message write as”please fill in your phone number.”
7. Select error location “top of page”.
8. Save the validation rule.


consumer | Salesforce
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Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
consumer
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.
Validation Rule Edit
Save
Save & New
Cancel
Rule Name
Phonenumberoremailblankrule
Active
Description
phone number and email number should not be blank
Quick Tips
Operators & Functions
Error Condition Formula
= Required Information
Example: Discount_Percent__c>0.30
More Examples
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area
Insert Field
Insert Operator
OR(ISBLANK(Phone_number__c) , ISBLANK(email__c))
Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign
Help on this function
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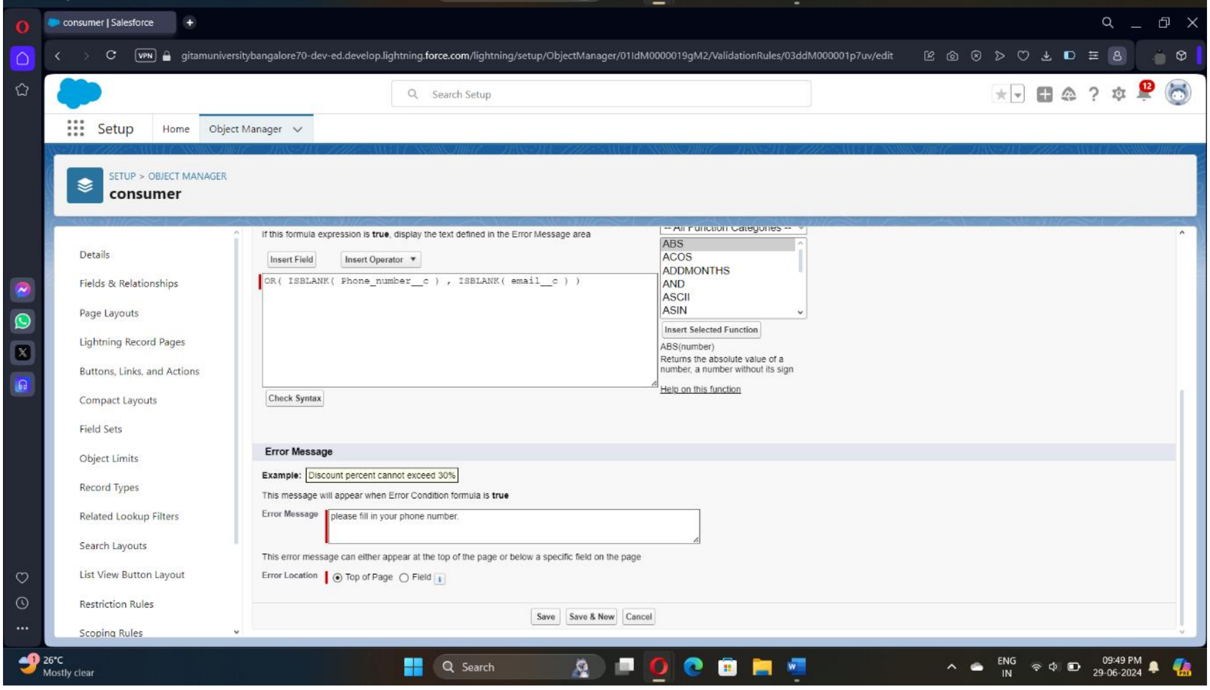
consumer | Salesforce
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Search Setup
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Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
If this formula expression is true, display the text defined in the Error Message area
Insert Field
Insert Operator
OR(ISBLANK(Phone_number__c) , ISBLANK(email__c))
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign
Help on this function
Check Syntax
Error Message
Example: Discount percent cannot exceed 30%
This message will appear when Error Condition formula is true
Error Message
please fill in your phone number.
This error message can either appear at the top of the page or below a specific field on the page
Error Location
Top of Page
Field
Save
Save & New
Cancel
26°C
Mostly clear
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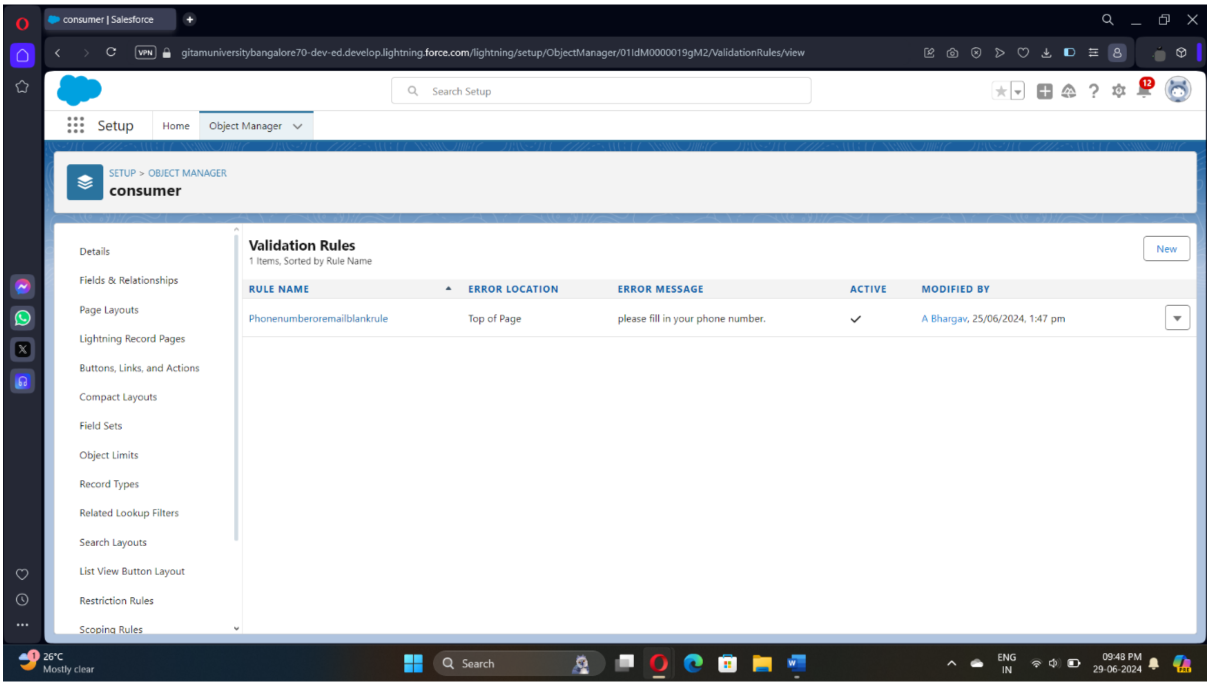
29-06-2024



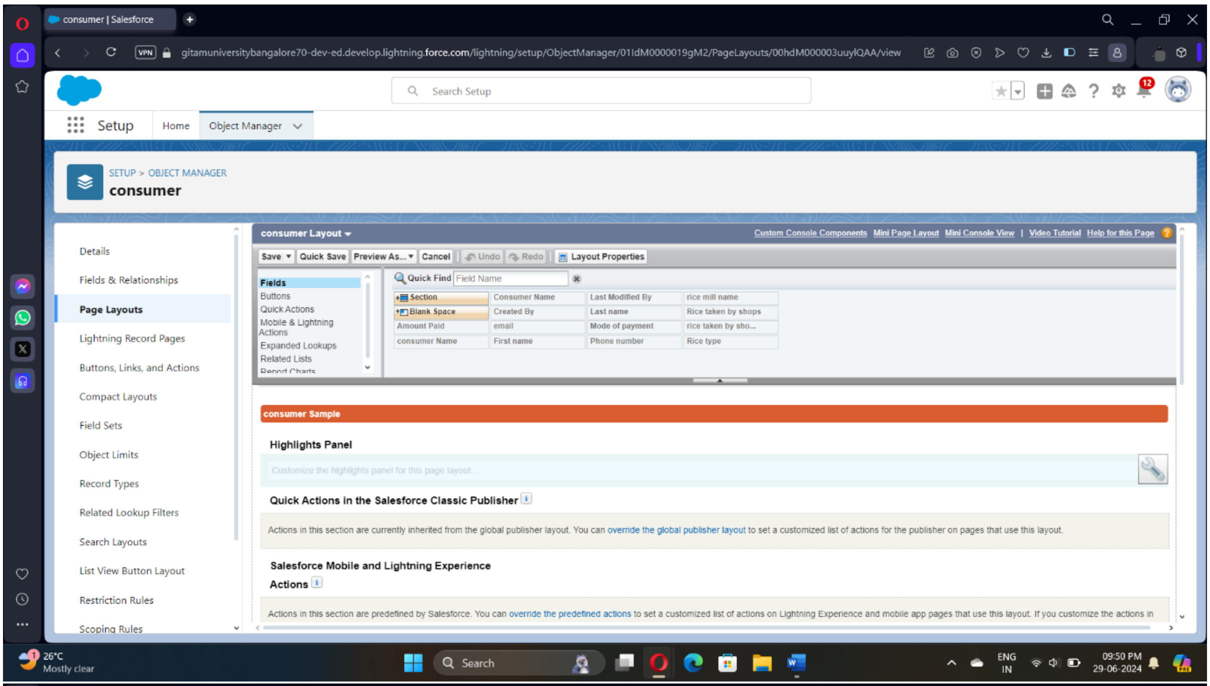
Milestone 6 : Page layouts

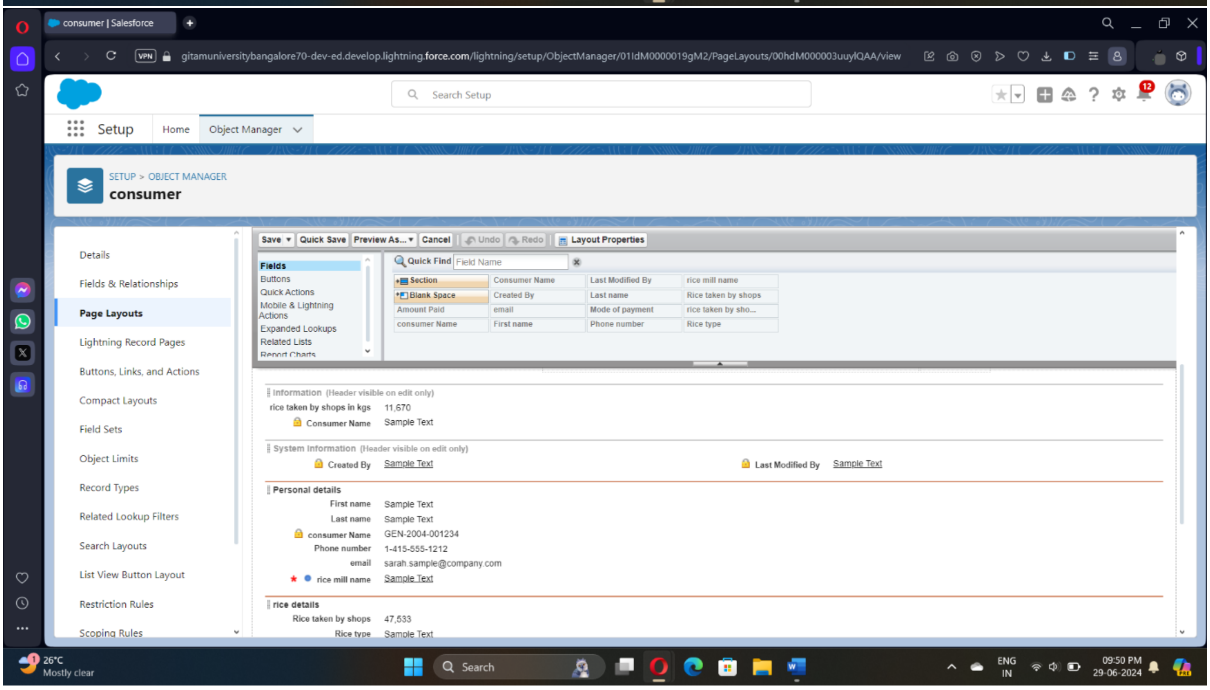
Activity 1 : creating the page layout

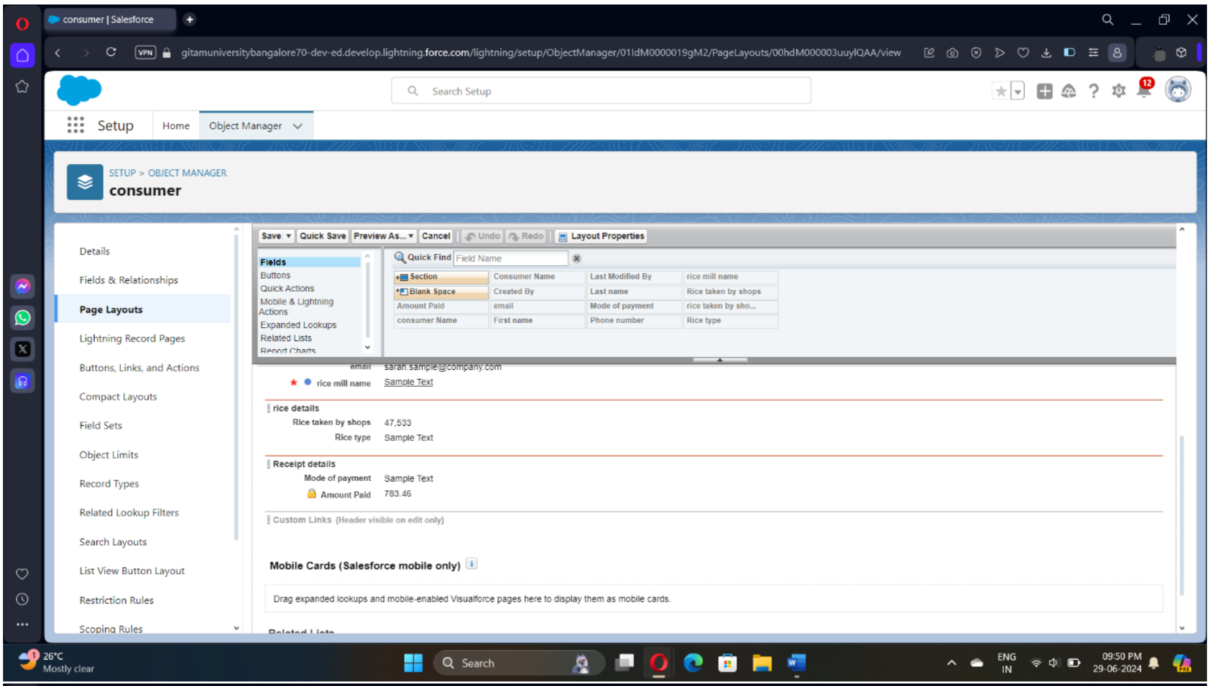
To Create a Page layout:

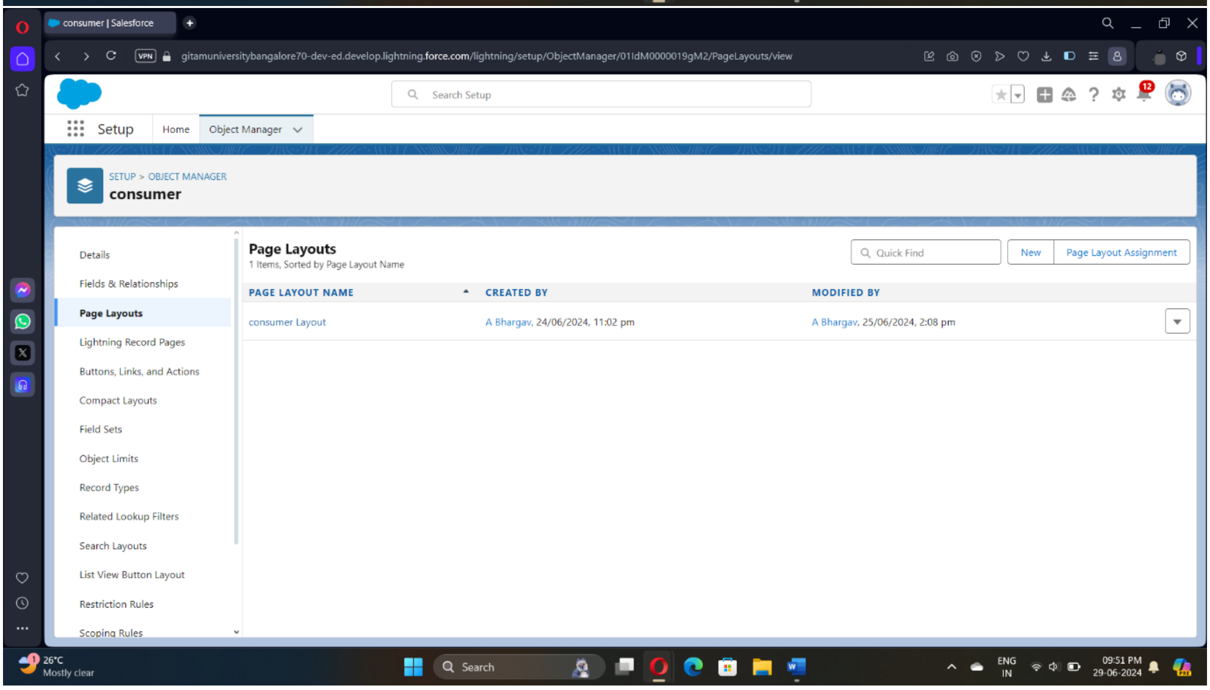
1. Go to Setup → Click on Object Manager → Search for the object (consumer) → From drop down select the object and click on it.
2. Click on Page layout → Click on New.
3. Select the existing page layout, and give the page layout name as "consumer layout", and click save.
4. Drag and drop the section field to consumer details and create the section.
5. Enter the section name as "Personal details", → click Ok.
6. Now drag the fields to this section that mentioned , they are
    - First name , last name , consumer name , phone number, email, rice mill name.

7. Follow the same process for another two sections as shown above , they are
8. One section is " rice details " , drag the fields that are
    - Rice taken by shop, rice type.
9. Another section is "Receipt details ", and drag the fields that are
    - Mode of payment , Amount paid.
10. Then , Click save.









Milestone 7 : Profiles

Activity 1: owner Profile

To create a new profile:

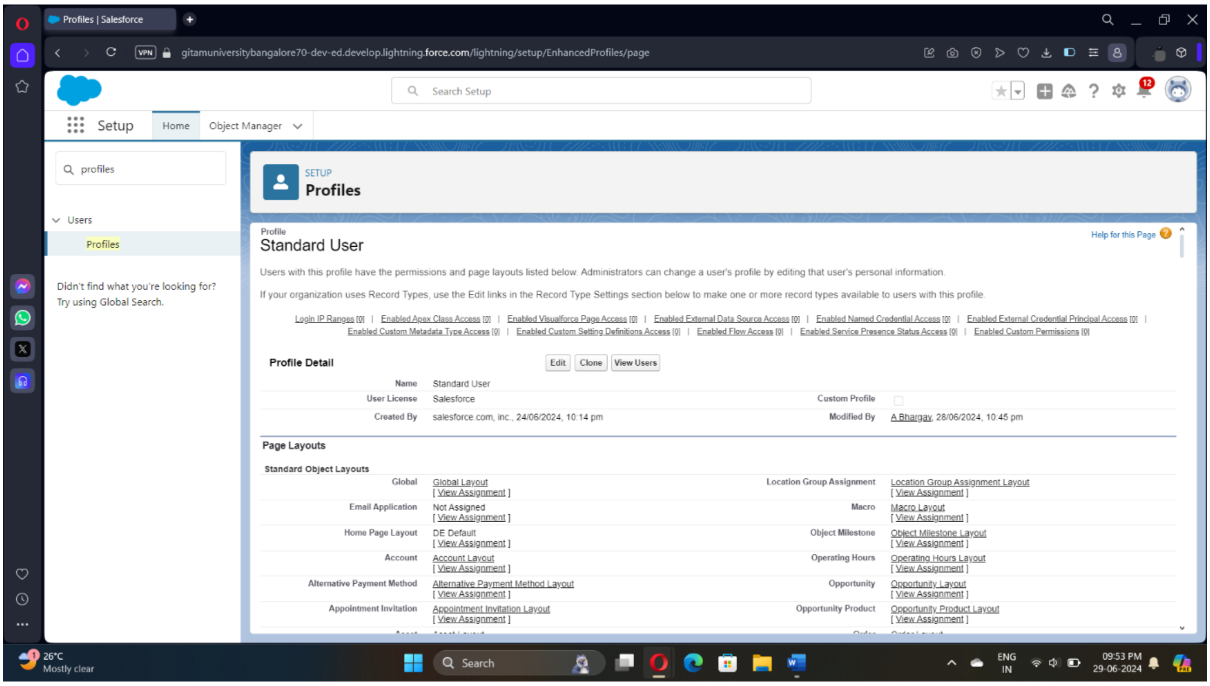
1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (Standard User) → enter profile name (owner) → Save.
2. Scroll down to Custom Object Permissions and Give access permissions for consumers, rice details , rice mill and suppliers objects as mentioned in the below diagram.
3. Give access and save it.

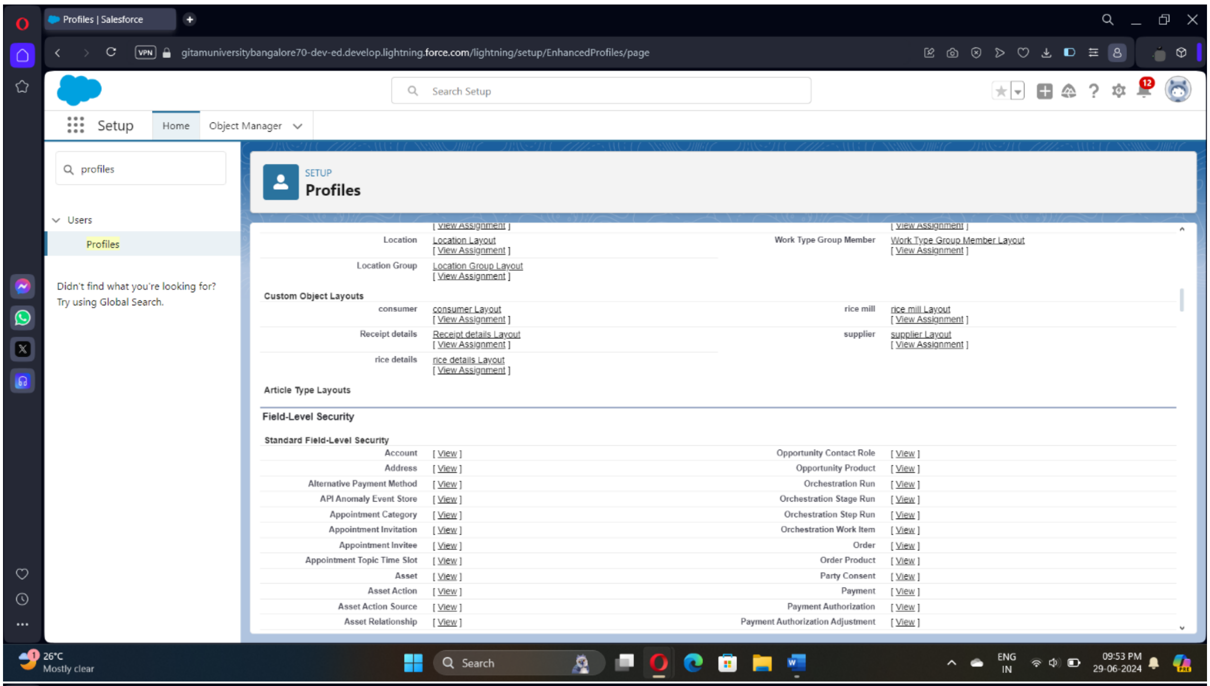
Activity 2: employer Profile

1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (Standard Platform User) → enter profile name (employer) → Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the rice mill..
4. Scroll down to Custom Object Permissions and Give access permissions for consumer, rice details , rice mill and suppliers objects as mentioned in the below diagram.

Activity 3: worker Profile

1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (Standard Platform User) → enter profile name (worker) → Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the rice mill.
4. Scroll down to Custom Object Permissions and Give access permissions for consumer, rice details , rice mill and suppliers objects as mentioned in the below diagram.
5. And click save.




Profiles | Salesforce
gitamuniversitybangalore70-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page
Search Setup
Setup
Home
Object Manager
profiles
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Location
Location Layout
[View Assignment]
Location Group
Location Group Layout
[View Assignment]
Work Type Group Member
Work Type Group Member Layout
[View Assignment]
Custom Object Layouts
consumer
consumer Layout
[View Assignment]
Receipt details
Receipt details Layout
[View Assignment]
rice details
rice details Layout
[View Assignment]
rice mill
rice mill Layout
[View Assignment]
supplier
supplier Layout
[View Assignment]
Article Type Layouts
Field-Level Security
Standard Field-Level Security
Account [View]
Address [View]
Alternative Payment Method [View]
API Anomaly Event Store [View]
Appointment Category [View]
Appointment Invitation [View]
Appointment Invitee [View]
Appointment Topic Time Slot [View]
Asset [View]
Asset Action [View]
Asset Action Source [View]
Asset Relationship [View]
Opportunity Contact Role [View]
Opportunity Product [View]
Orchestration Run [View]
Orchestration Stage Run [View]
Orchestration Step Run [View]
Orchestration Work Item [View]
Order [View]
Order Product [View]
Party Consent [View]
Payment [View]
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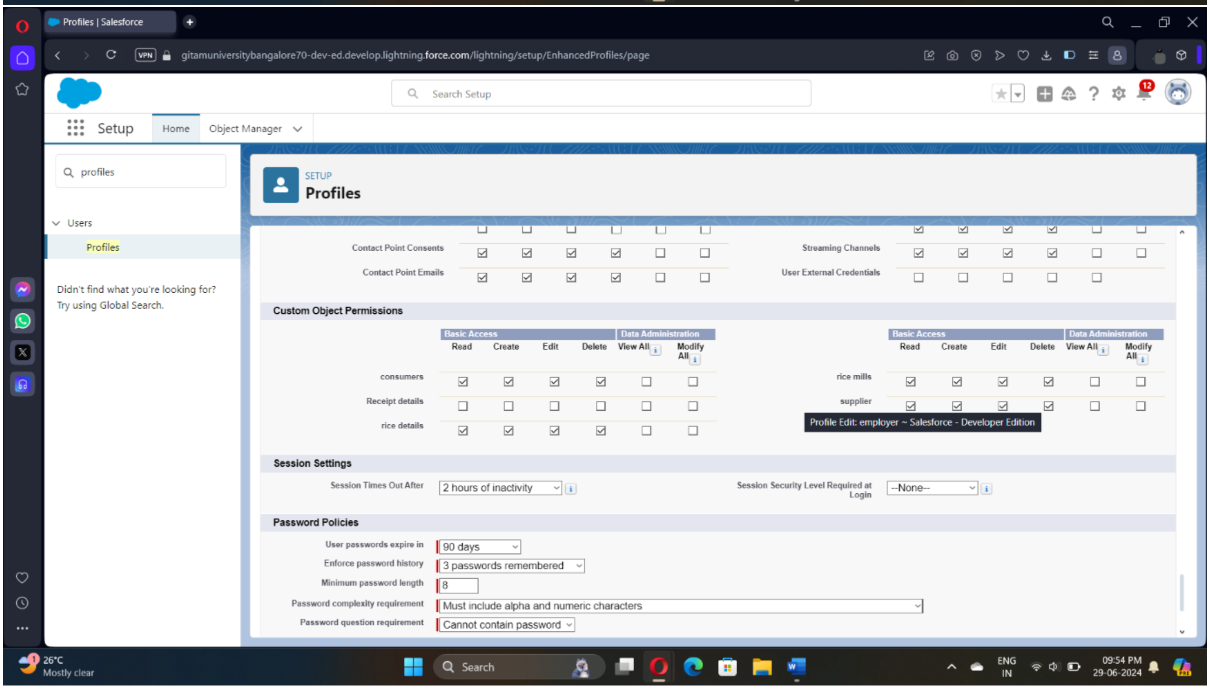
Profiles | Salesforce
gitamuniversitybangalore70-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page
Search Setup
Setup
Home
Object Manager
profiles
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Contact Point Consents
Contact Point Emails
Streaming Channels
User External Credentials
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
consumers
Receipt details
rice details
rice mills
supplier
Profile Edit: employer ~ Salesforce - Developer Edition
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password length
8
Password complexity requirement
Must include alpha and numeric characters
Password question requirement
Cannot contain password
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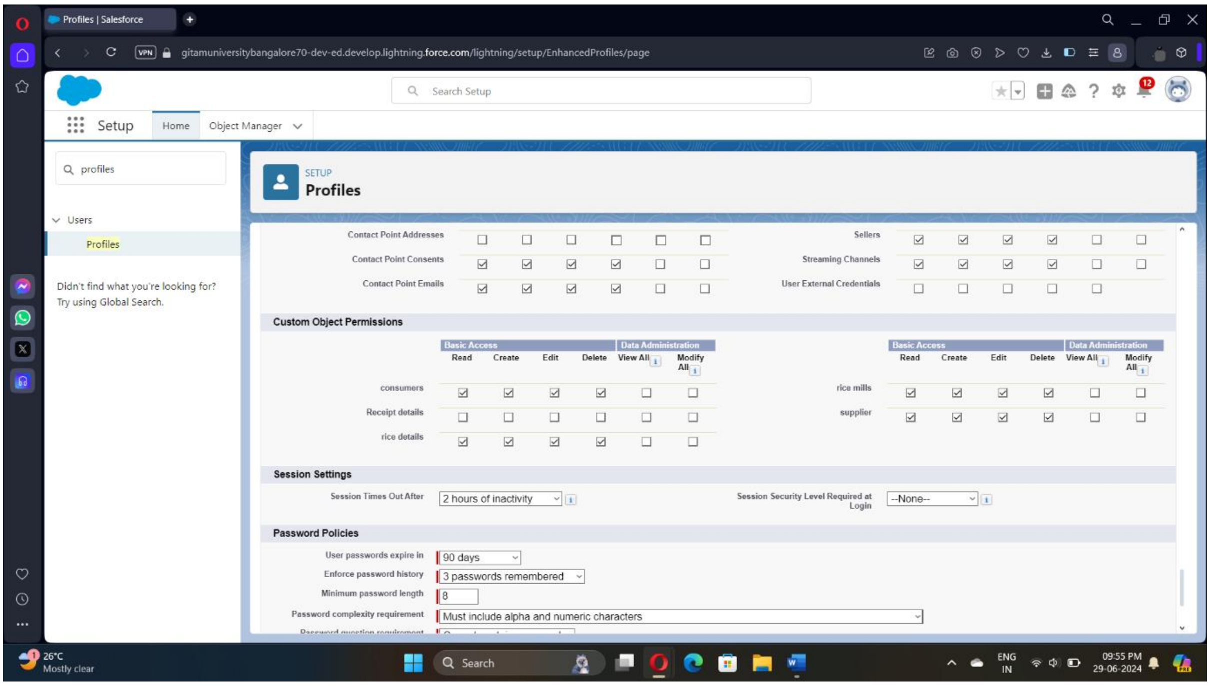


Milestone 8 : Role & Role Hierarchy

Activity 1: Creating owner Role

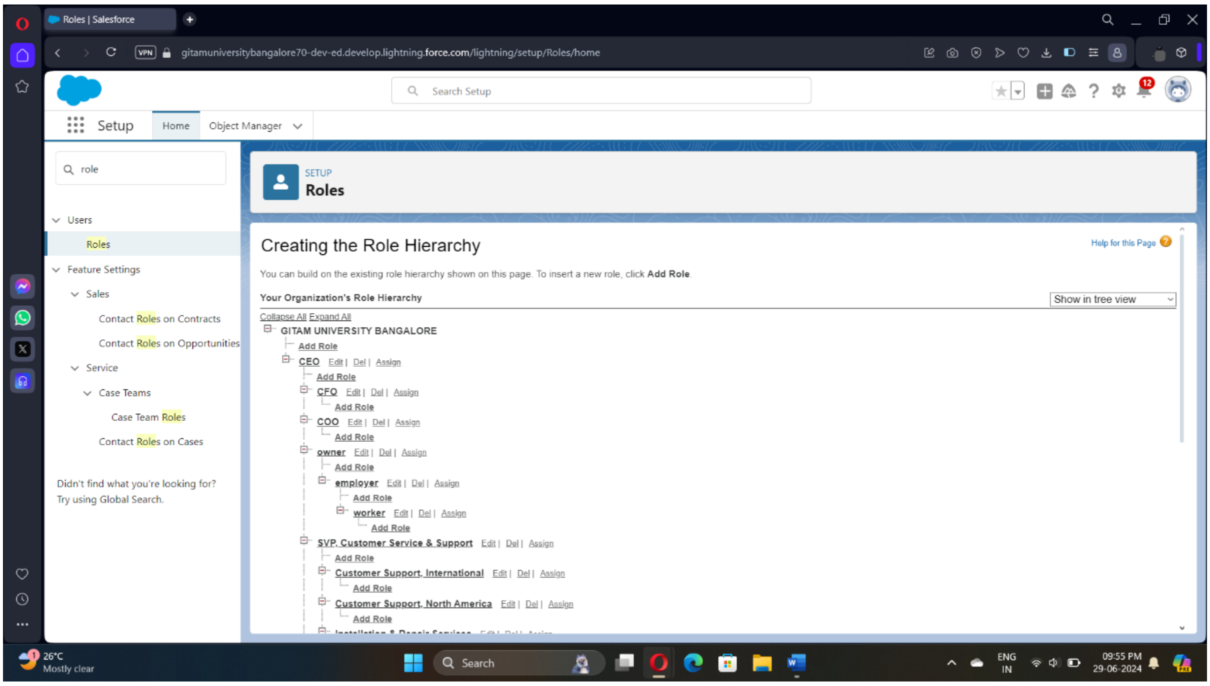
Creating owner Role:

1. Go to quick find → Search for Roles → click on set up roles.
2. Go to quick find → Search for Roles → click on set up roles.
3. Click on Expand All and click on add role under whom this role works.
4. Give Label as “owner” and Role name gets auto populated. Then click on Save.
5. Click and save it.

Activity 2: Creating employer roles

Creating another two roles under manager

1. Go to quick find → Search for Roles → click on set up roles.
2. Click plus on CEO role, and click add role under owner.
3. Give Label as “employer” and Role name gets auto populated. Then click on Save.
4. Repeat the same steps, for another role.
5. Click plus on CEO role, and click plus on owner, and click add role under employer
6. give Label as “worker” and Role name gets auto populated. Then click on Save.



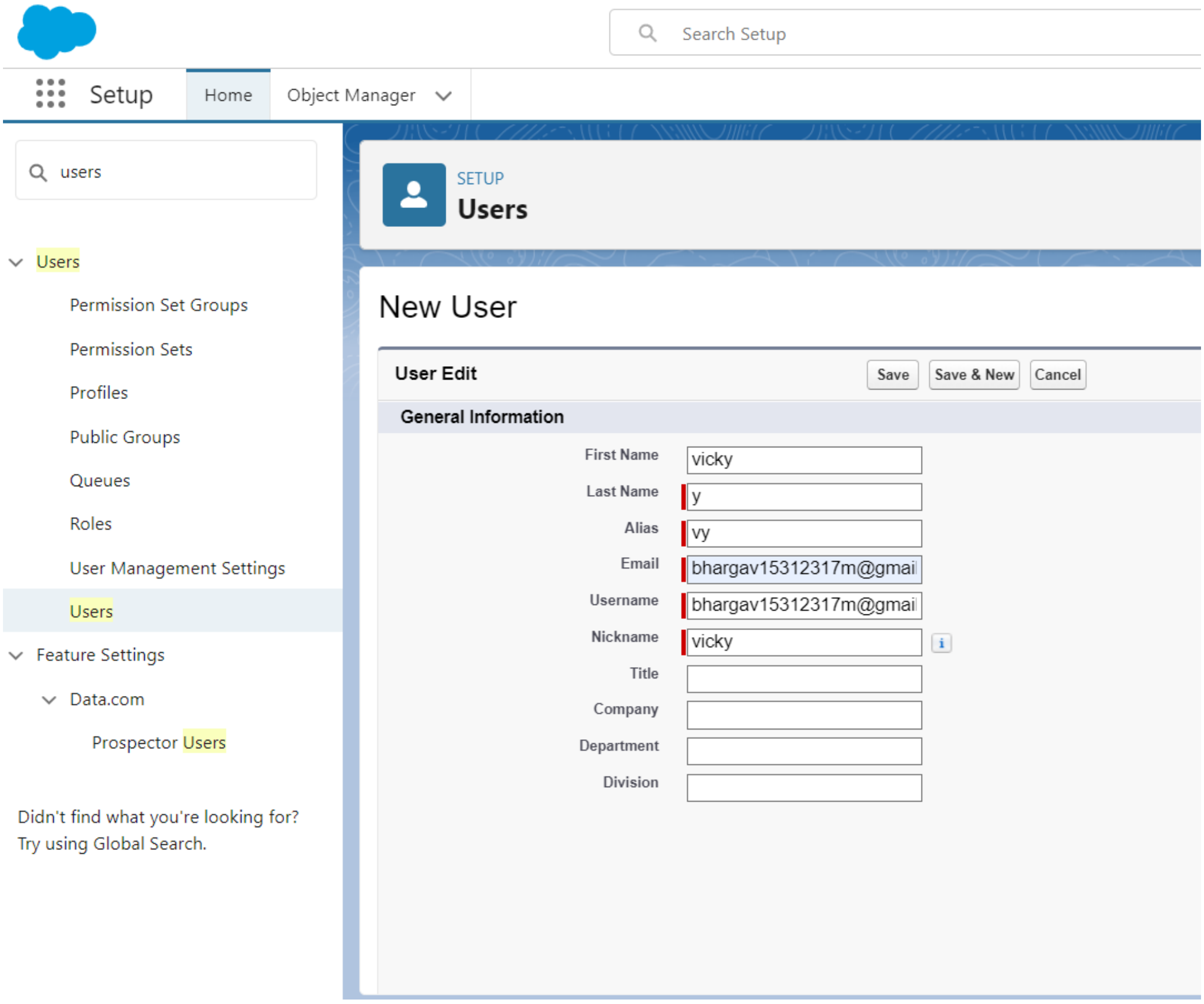
Milestone 9 : Users

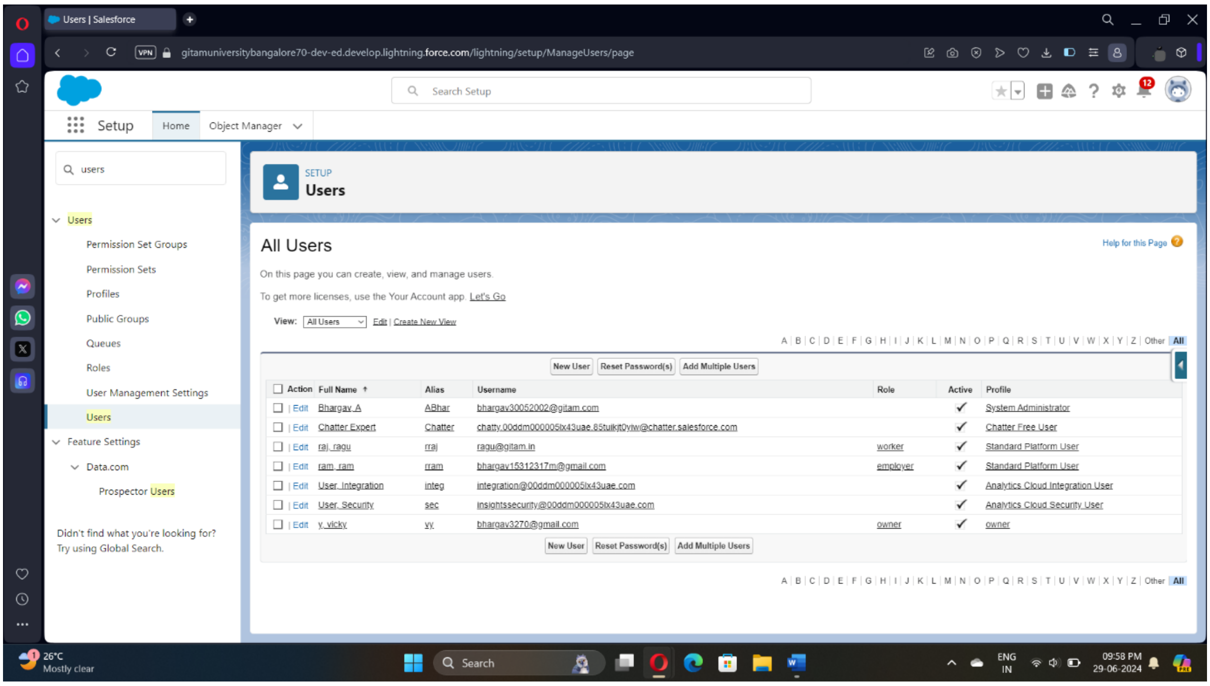
1. Go to setup → type users in quick find box → select users → click New user.
2. Fill in the fields
3. First Name : Vicky
4. Last Name : y
5. Alias : Give a Alias Name
6. Email id : Give your Personal Email id
7. Username : Username should be in this form: text@text.text
8. Nick Name : Give a Nickname
9. Role : owner
10. User license : Salesforce
11. Profiles : owner.

Activity 2: creating another users

1. Go to setup → type users in quick find box → select users → click New user.
2. Fill in the fields
3. First Name: ram
4. Last Name : ram
5. Alias : Give a Alias Name
6. Email id : Give your Personal Email id
7. Username : Username
8. Nick Name: Give a Nickname
9. Role : employer
10. User license : Salesforce platform
11. Profiles : standard platform user.

12. Go to setup → type users in quick find box → select users → click New user.
13. Fill in the fields
14. First Name: ragu
15. Last Name : raj
16. Alias : Give a Alias Name
17. Email id : Give your Personal Email id
18. Username : Username should be in this form: text@text.text
19. Nick Name : Give a Nickname
20. Role : worker
21. User license : Salesforce platform
22. Profiles : standard platform user.

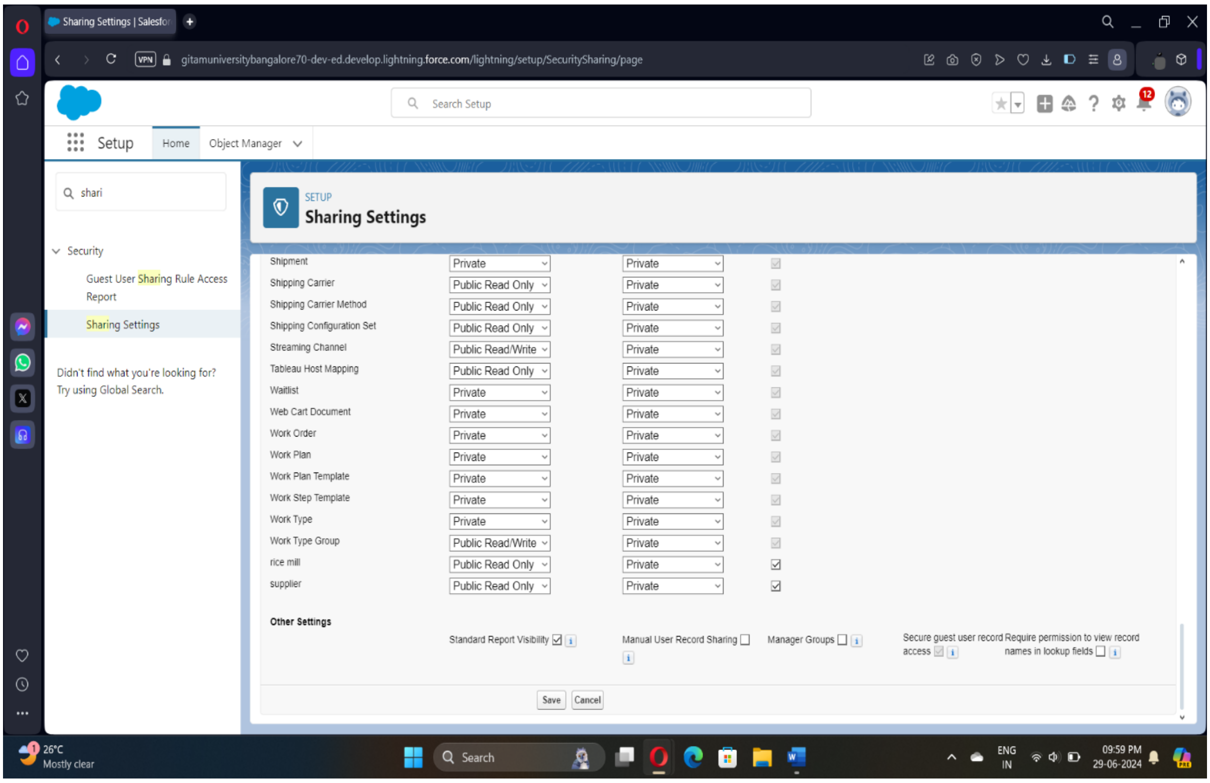




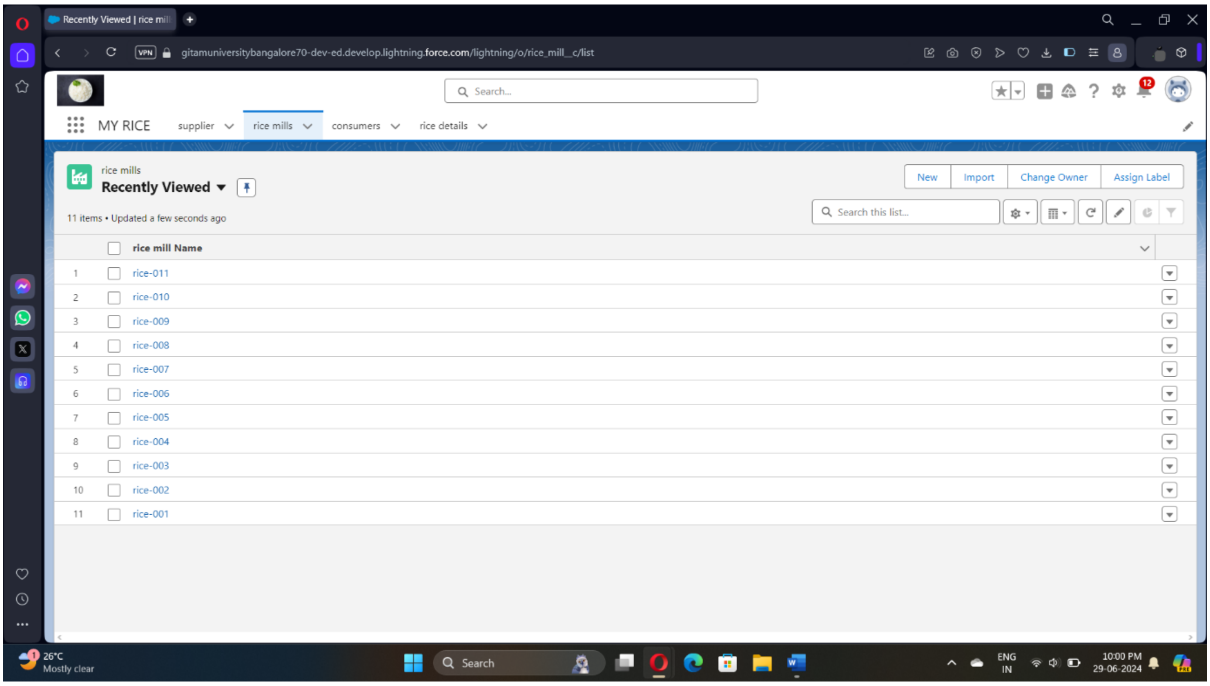
Milestone 10 : Permission sets

Activity 1: Creating OWD setting.

1. Go to setup → type "sharing settings " in quick search → Click edit.
2. Scroll down, change the default internal access to " public read-only" for rice mill and supplier object.
3. Click save.
4. Extra information, By these every profile has their own access, according to their profile.
5. But in our case we created roles and given the roles in such a way that the owner can see employer and worker records , and the employer can see the worker records.



create the latest “10” records in consumer objects.



Milestone 11 : Reports

Activity 1: Create Report

1. Go to the app → click on the reports tab
2. Click New Report.
3. select for report type, search for “rice mill with consumers” click on it. And click on start report.
4. Their outline pane is opened already, select the fields that are mentioned below in the column section.

    1.consumer name

    2.rice type

    3.rice price/kg

    4.mode of payments

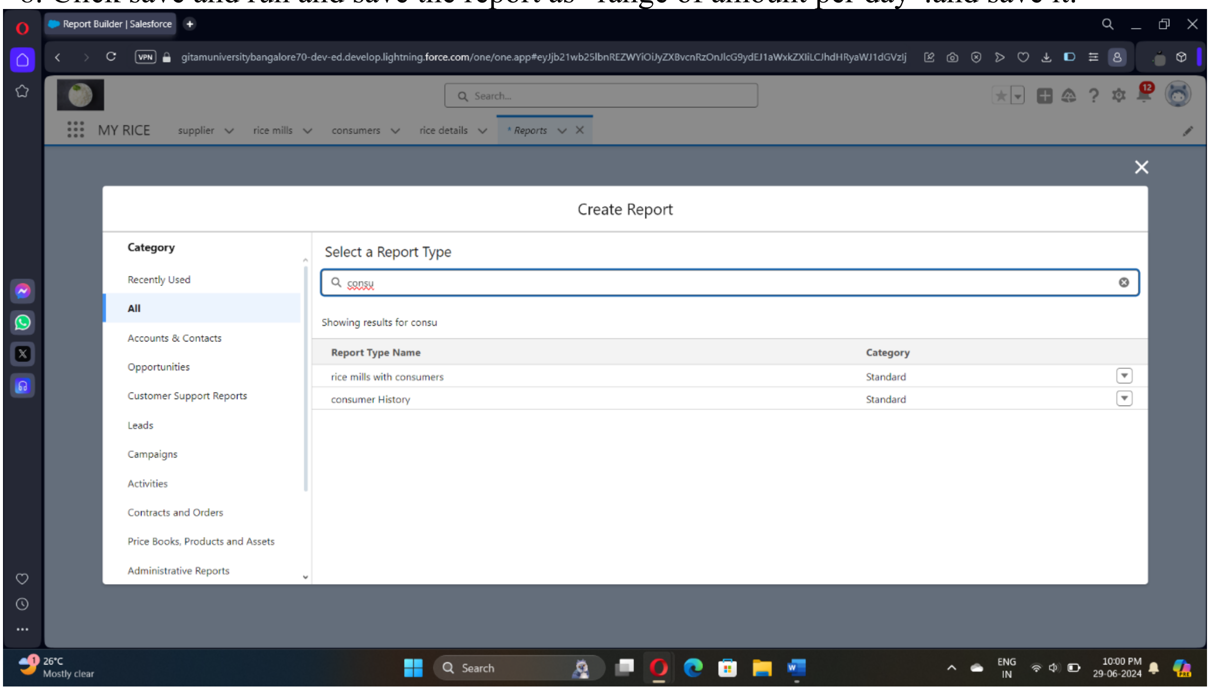
    5.amount paid

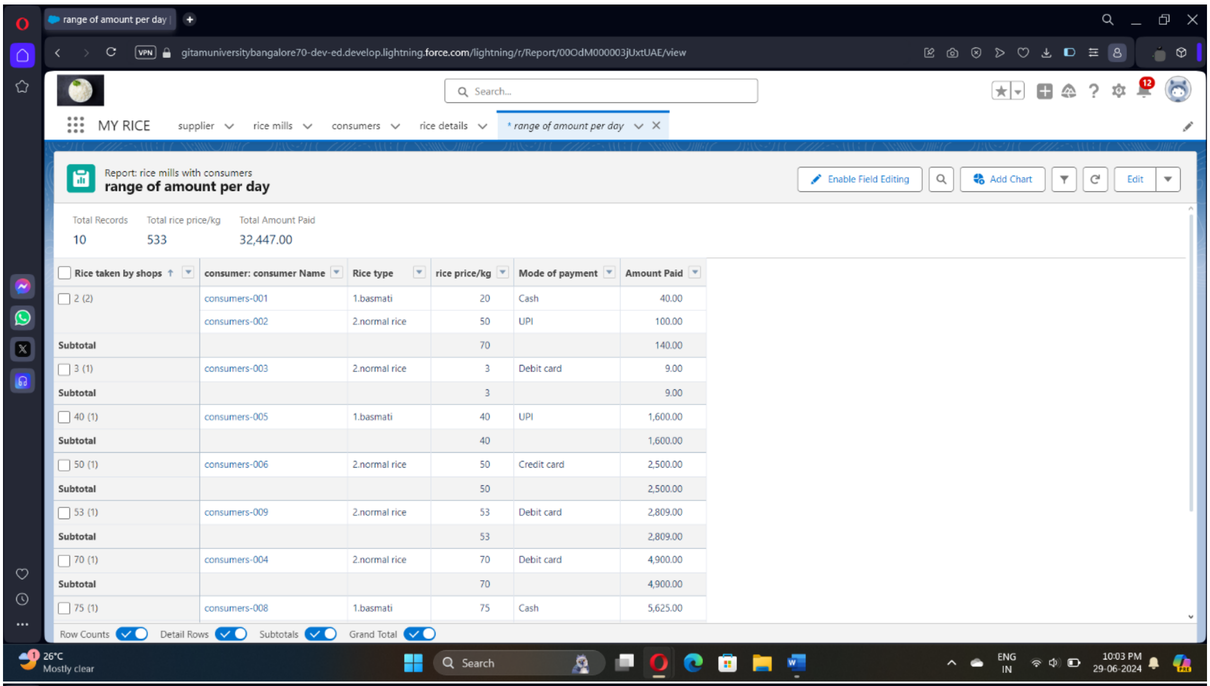
5. Remove the unnecessary fields.

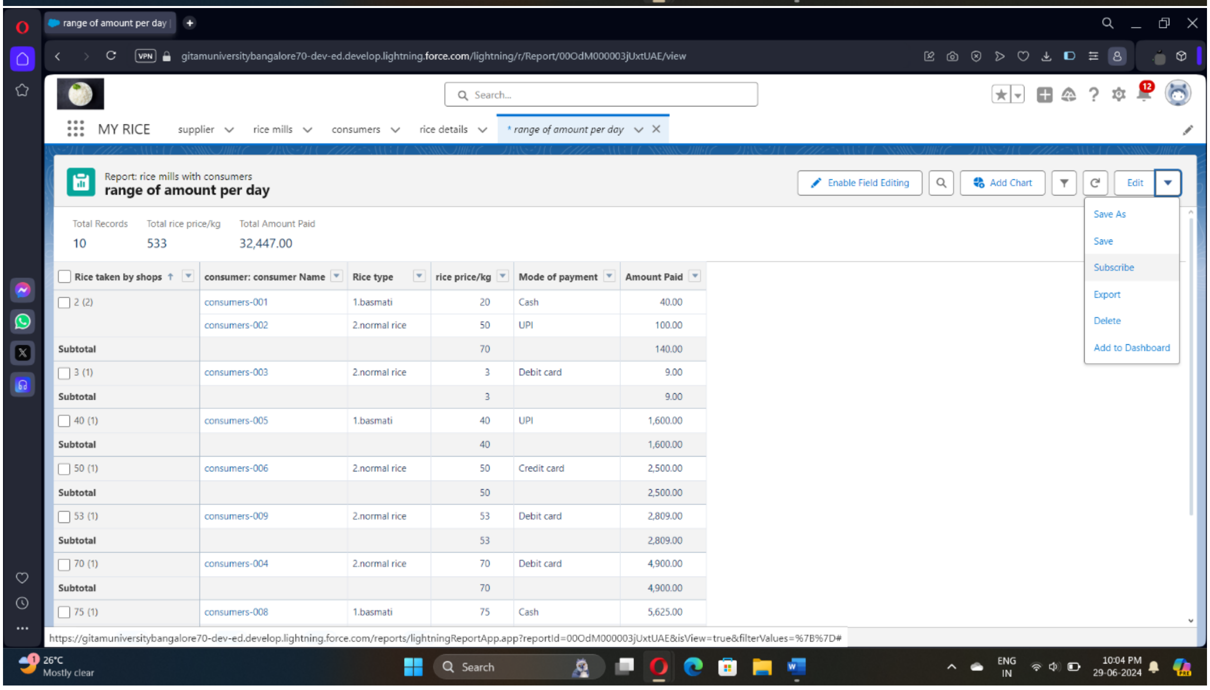
6. Select the fields that are mentioned below in the GROUP ROWS section.

7. Rice taken by shops.

8. Click save and run and save the report as “range of amount per day”.and save it.

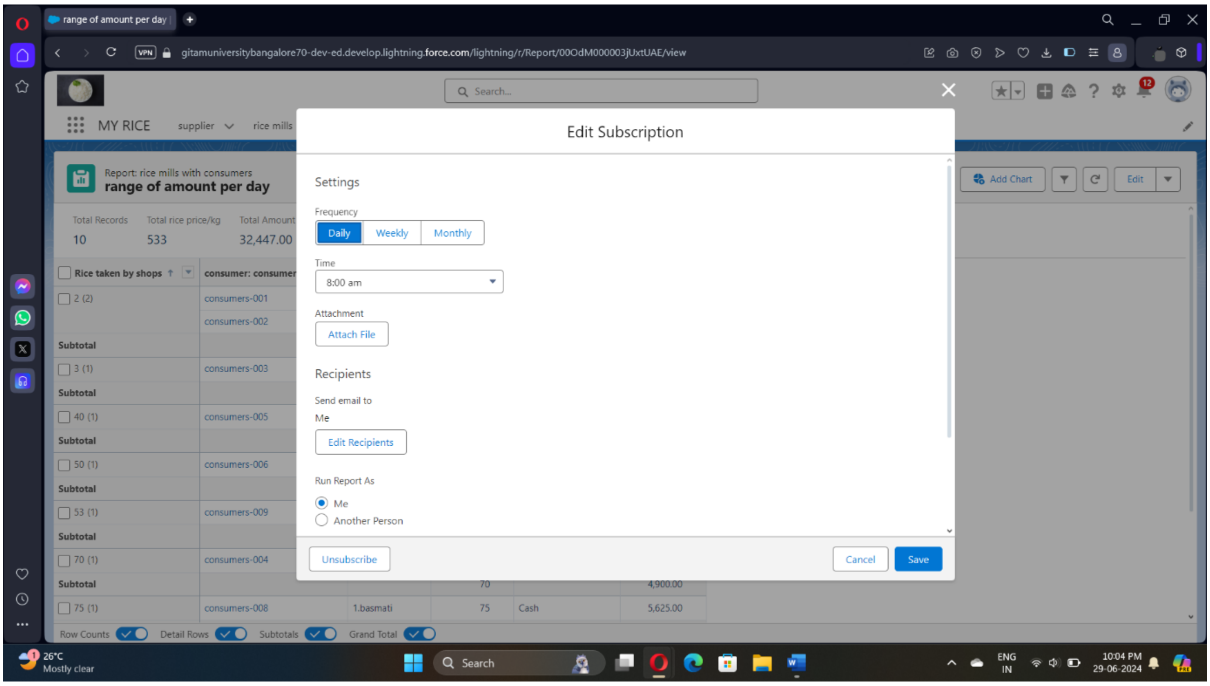






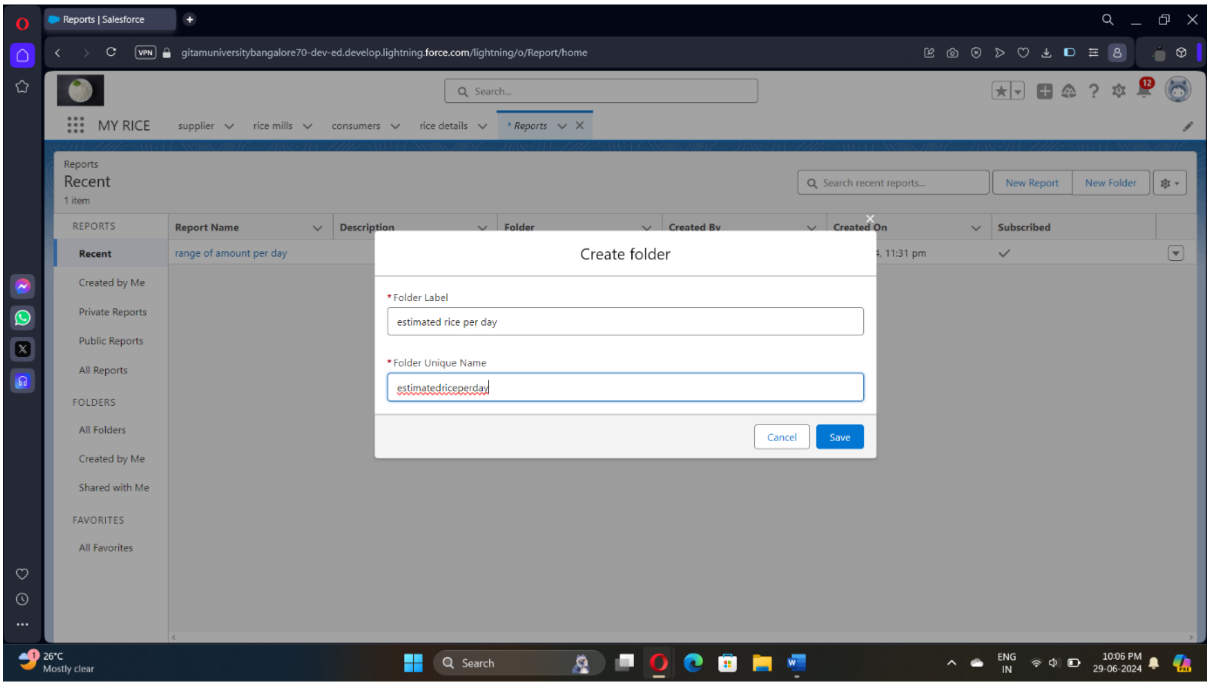
Activity 2: Sharing report to owner

1. Click edit drop down and select subscribe option
2. Follow as per below image.
3. After selecting the run report as a "another person" select your personal account or whom you want to send that mail to.
4. Click save.



Activity 3: create a report folder

1. Click on the app launcher and search for reports.
2. Double click on the report, “ reports tab” will be auto populated in the navigation bar.
3. Click on the report tab, click on the new folder.
4. Give the Folder label as “estimated rice per day ”, Folder unique name will be auto populated.
5. Click save.

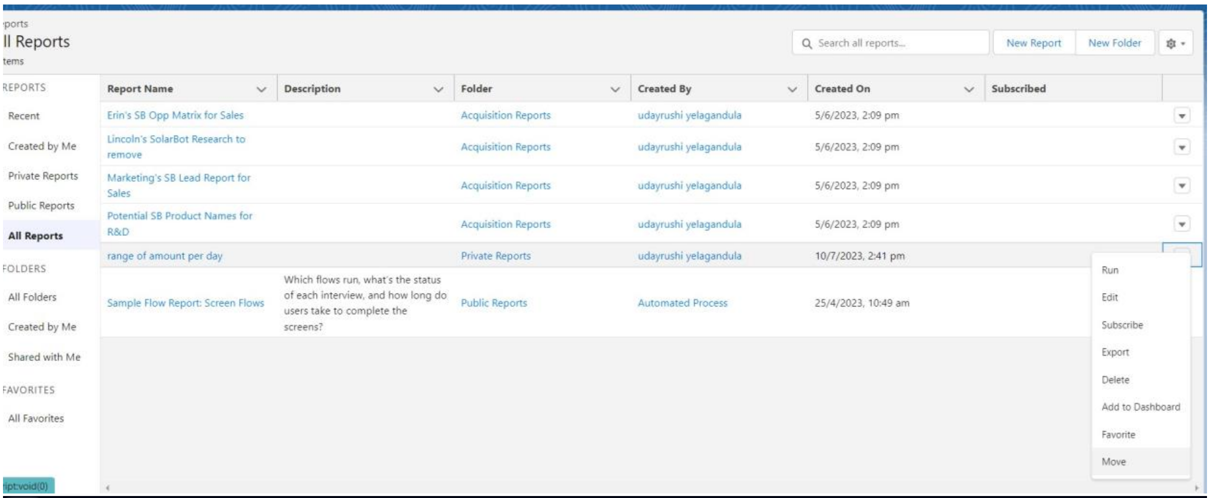


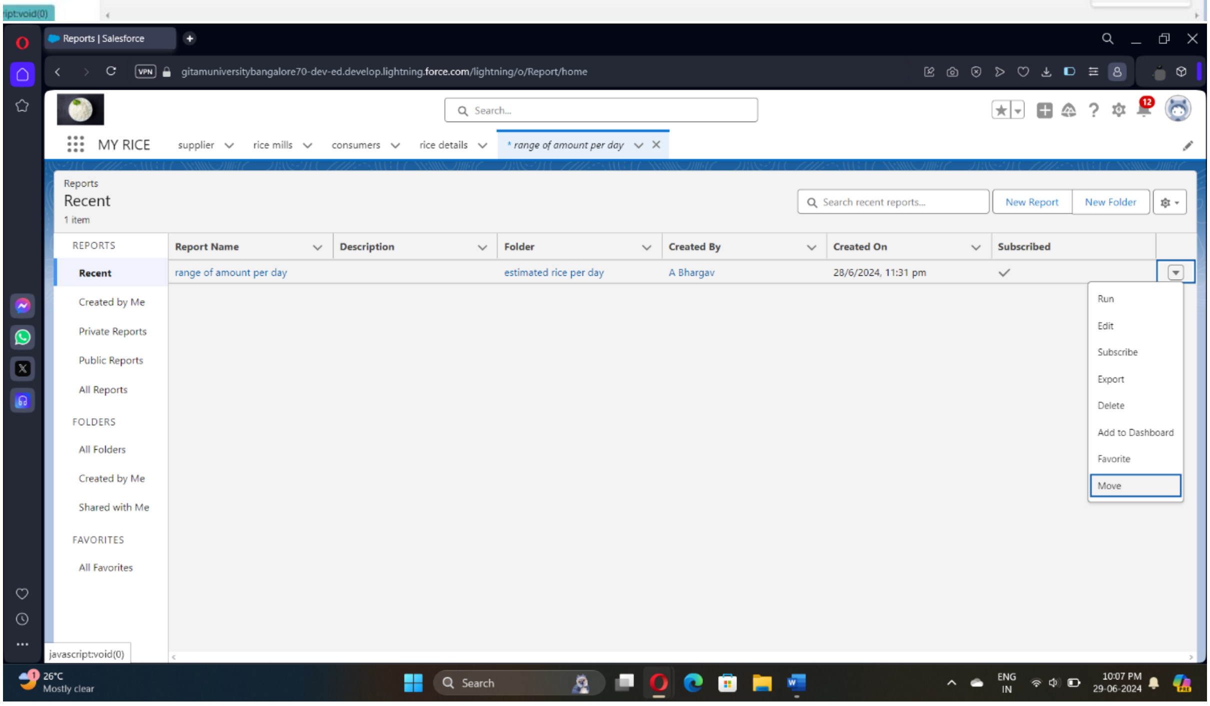
1.navigate to app launcher and click reports on that.

2.click all reports.

3. Select the range of amount per day drop down in that click move.

4. Select estimated rice per day folder and select folder.





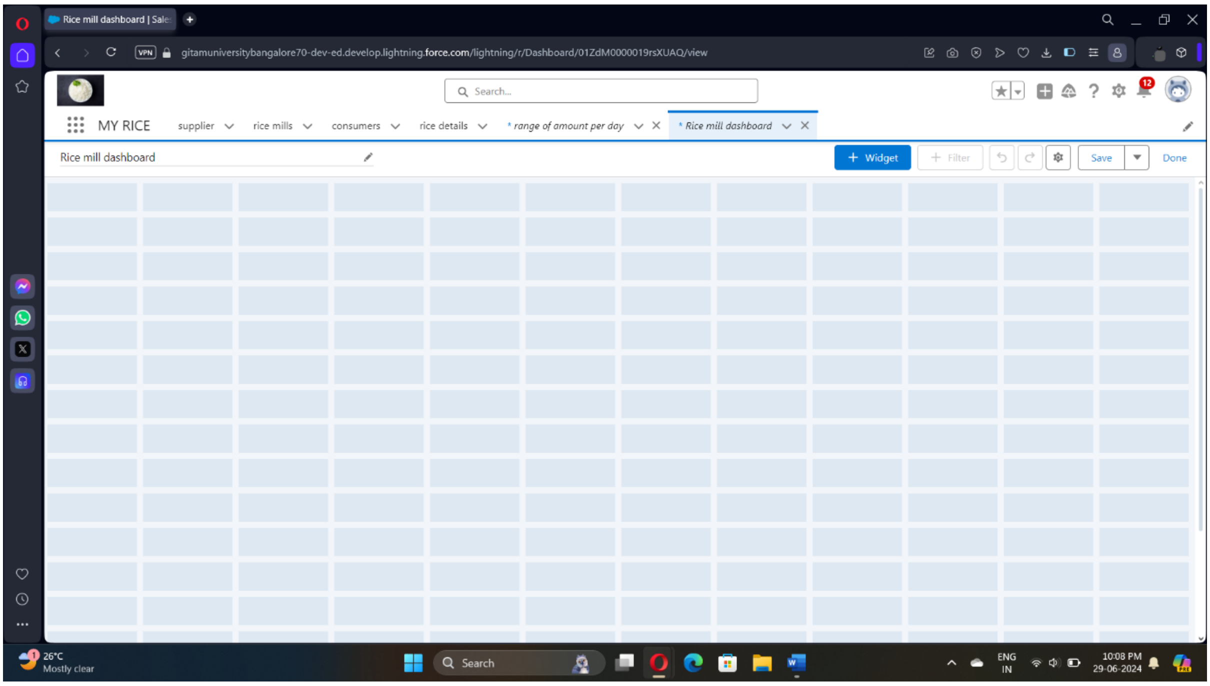
Milestone 12 : Dashboards

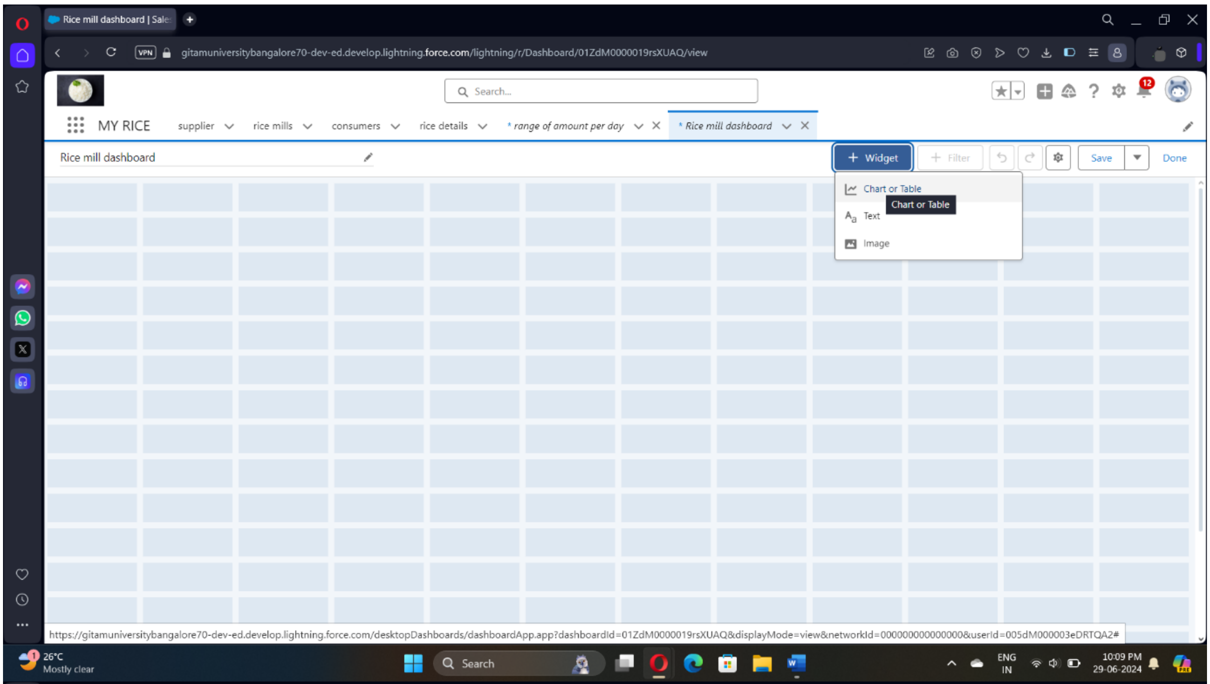
Activity 1: Create Dashboard Folder

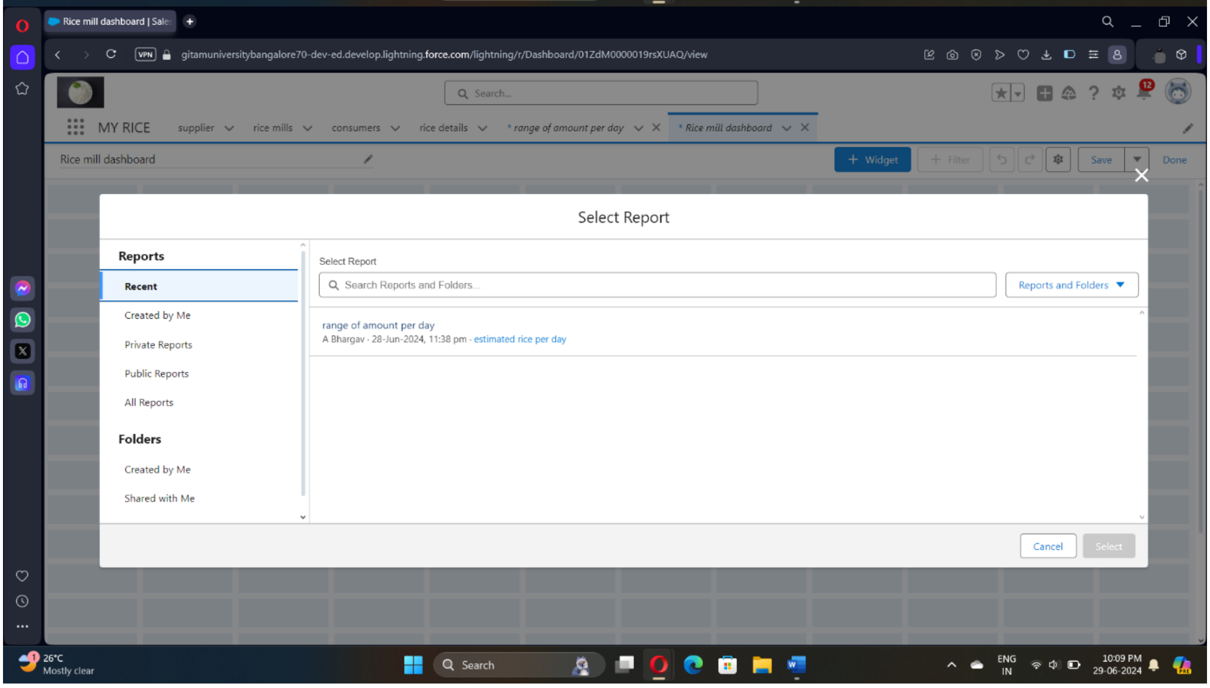
1. Click on the app launcher and search for the dashboard.
2. Click on the dashboard tab.
3. Click the new folder, give the folder label as “ amount data dashboard”.
4. Folder unique names will be auto populated.
5. Click save.

Activity 2: Create Dashboard

1. Go to the app → click on the Dashboards tabs.
2. Give a Name and select the folder that was created, and click on create.
3. Select add Widget.
4. Select a Report and click on select.




Rice mill dashboard
MY RICE
supplier
rice mills
consumers
rice details
* range of amount per day
* Rice mill dashboard
Widget
Filter
Save
Done
Chart or Table
Text
Image


Select Report
Reports
Recent
Created by Me
Private Reports
Public Reports
All Reports
Folders
Created by Me
Shared with Me
Select Report
Search Reports and Folders...
Reports and Folders
range of amount per day
A Bhargav • 28-Jun-2024, 11:38 pm • estimated rice per day
Cancel
Select

Display as- vertical bar chart

X-axis - rice taken by shops

Y-axis- sum of amount

Y-axis range - automatic

Sort by - rice taken by shops

Component theme - dark.

Add the component

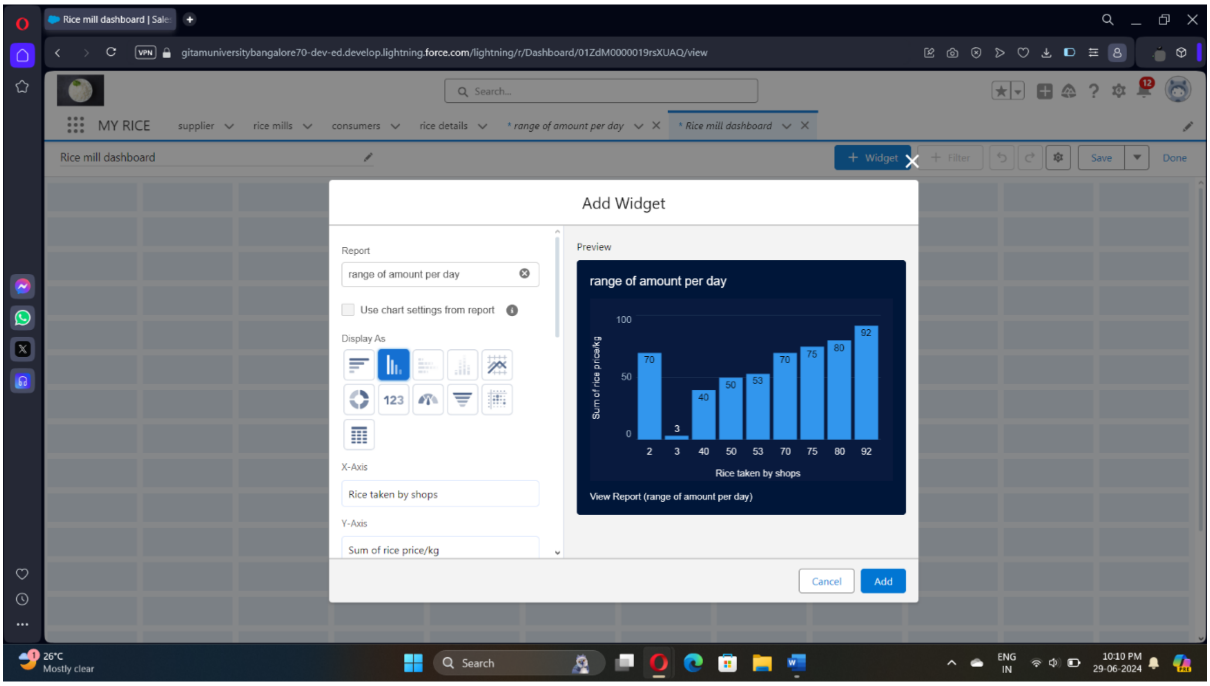
Again select add component with above same steps

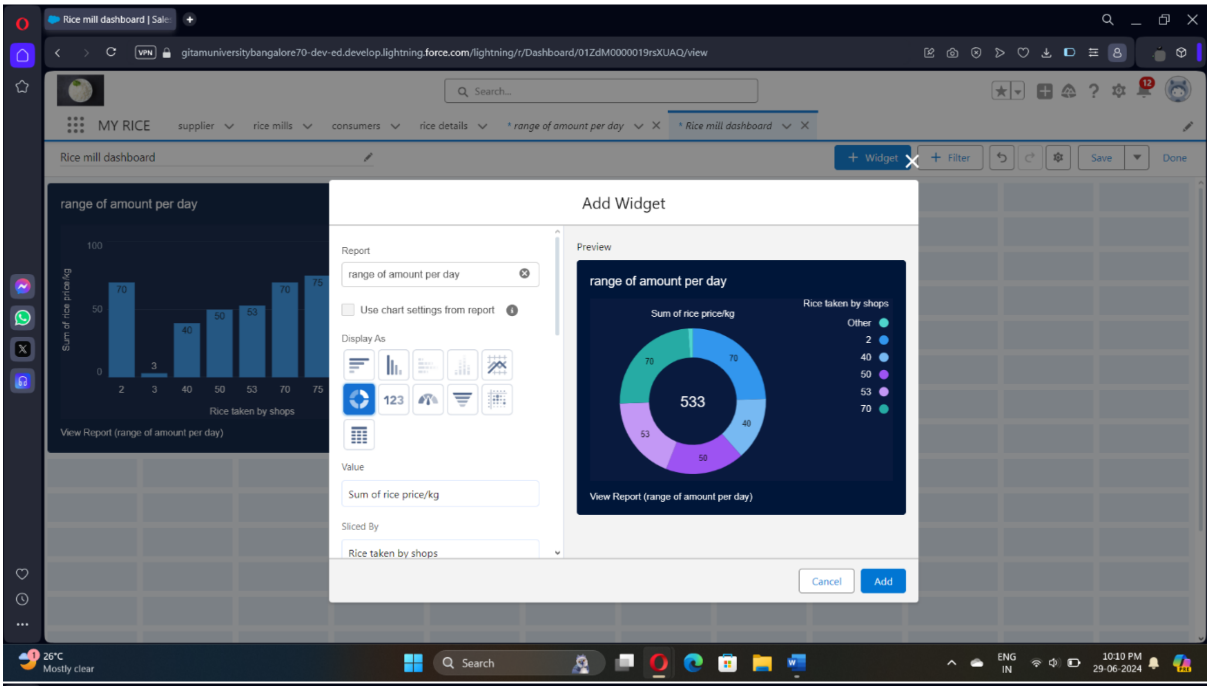
1.display as donut chart

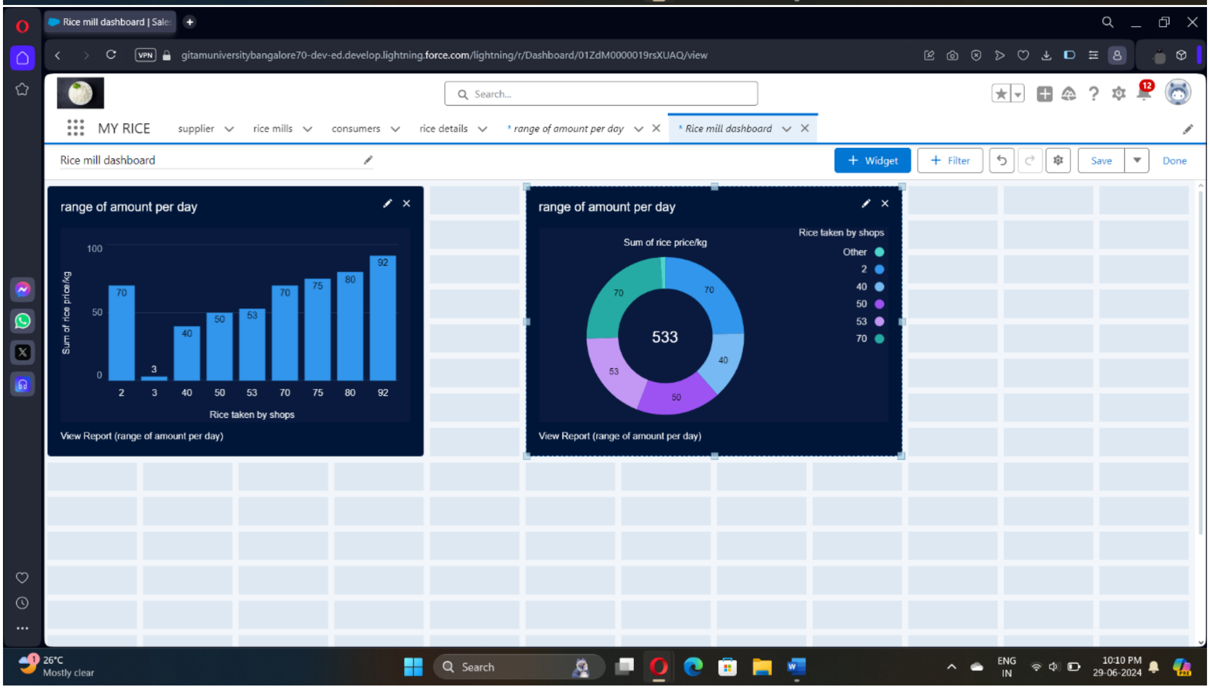
2.sort by - sum of amount

3.title-range of amount per day

4.component theme dark




Rice mill dashboard | Sale
gitamuniversitybangalore70-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01ZdM0000019rsXUAQ/view
MY RICE
supplier
rice mills
consumers
rice details
* range of amount per day
* Rice mill dashboard
Rice mill dashboard
Widget
Filter
Save
Done
range of amount per day
Add Widget
Report
range of amount per day
Use chart settings from report
Display As
Value
Sum of rice price/kg
Sliced By
Rice taken by shops
Preview
range of amount per day
Rice taken by shops
Sum of rice price/kg
533
View Report (range of amount per day)
Cancel
Add


Rice mill dashboard | Sale
gitamuniversitybangalore70-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01ZdM0000019rsXUAQ/view
MY RICE
supplier
rice mills
consumers
rice details
* range of amount per day
* Rice mill dashboard
Rice mill dashboard
Widget
Filter
Save
Done
range of amount per day
Sum of rice price/kg
Rice taken by shops
View Report (range of amount per day)
range of amount per day
Rice taken by shops
Sum of rice price/kg
533
View Report (range of amount per day)