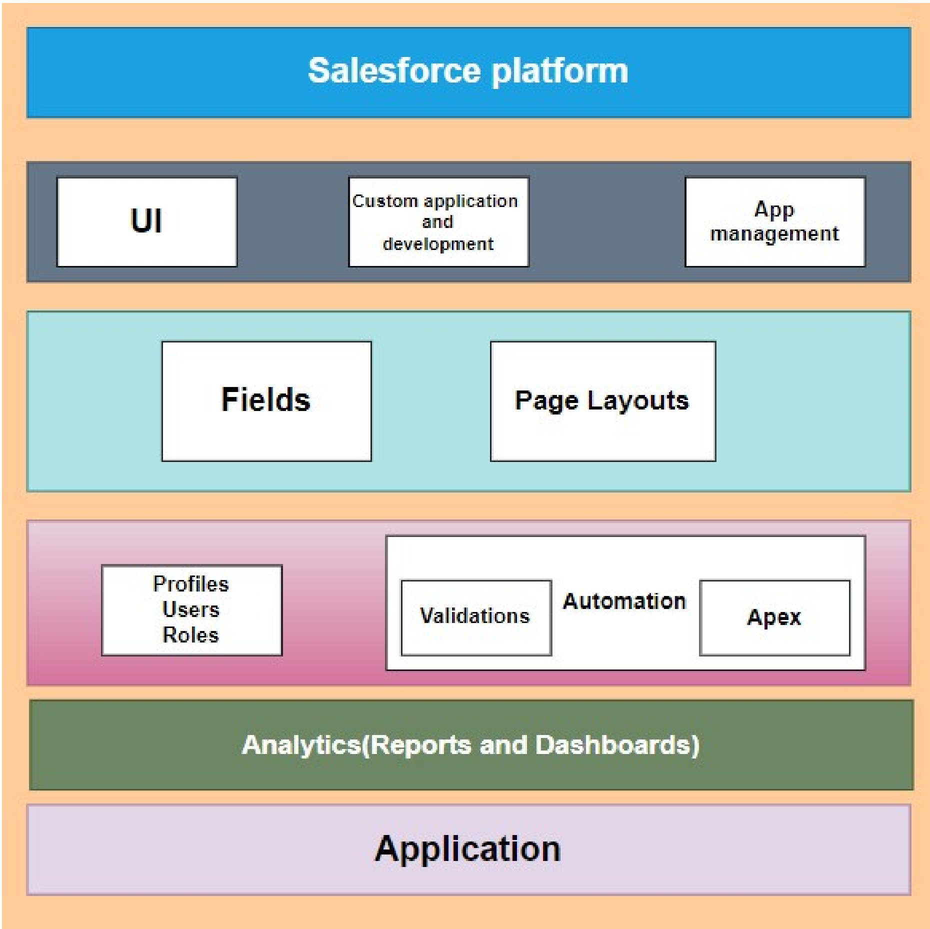
A CRM APPLICATION FOR WHOLESALE RICE MILL

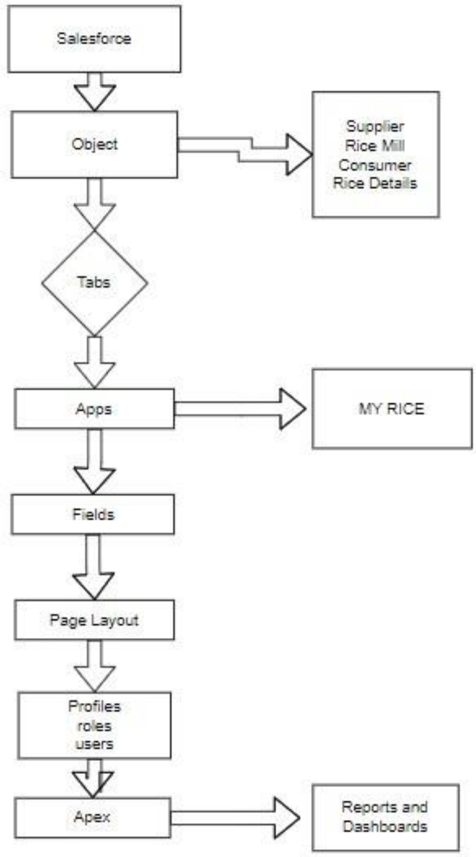
Introduction:

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.

Architecture:



Project Work Flow:



Features and Functionality:

Reporting 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.

A rollup 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.

A cross-object formula field: 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 rules: 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.

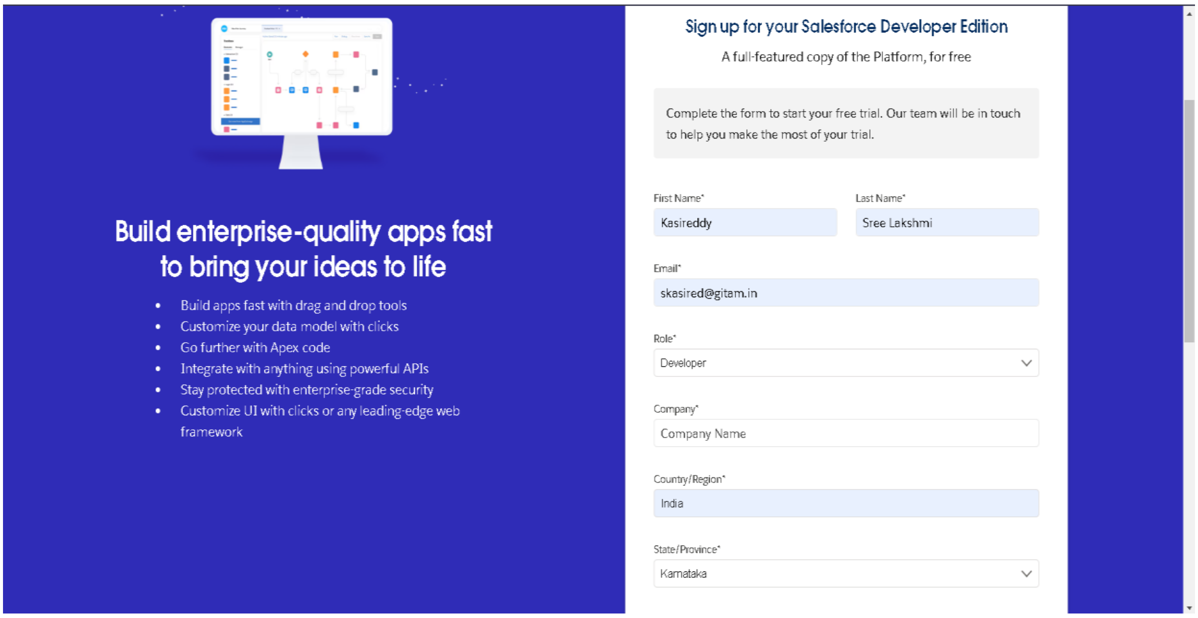
Permission sets: Organization Wide Defaults (OWD) in salesforce is the baseline level of access that the most restricted user should have. Organizational Wide Defaults are used to restrict access. But in our case, we created roles and given the roles in such a way that the owner can see employer and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

1.Introduction to salesforce

Salesforce is your customer success platform, designed to help you sell, service, market, analyse, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

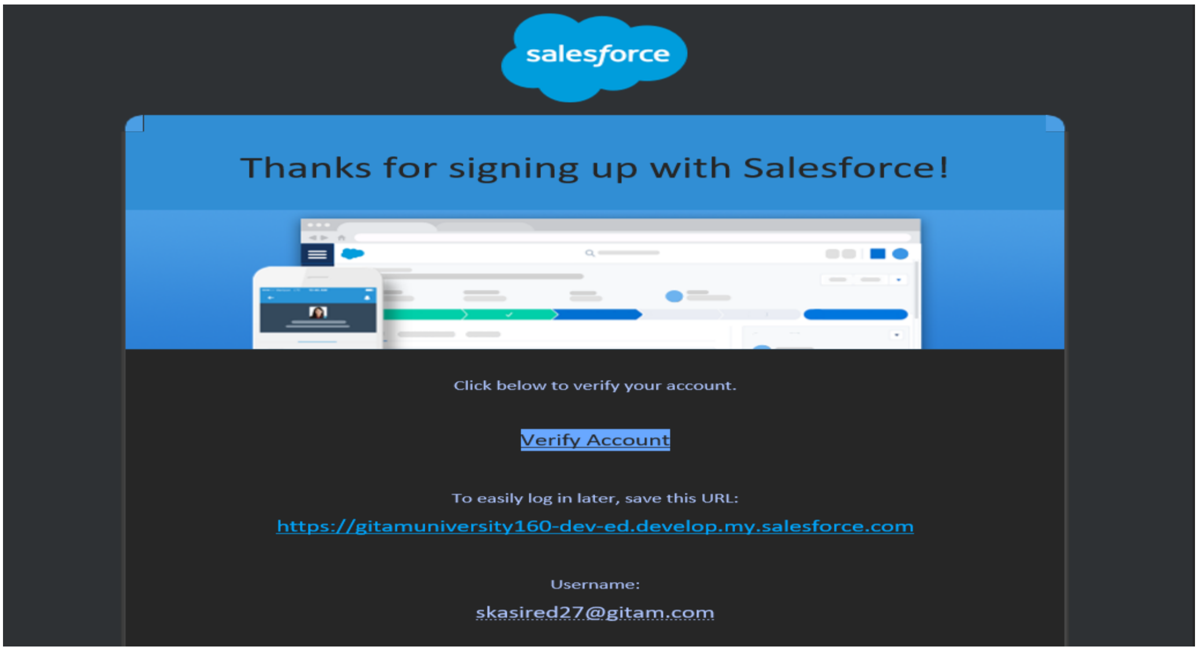
- ✓ Creating developer account

1. Go to https://developer.salesforce.com/signup
2. On the sign-up form, enter the following details:



✓ 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.



2. Object

Salesforce objects are database tables that permit you to store data that is specific to an organization

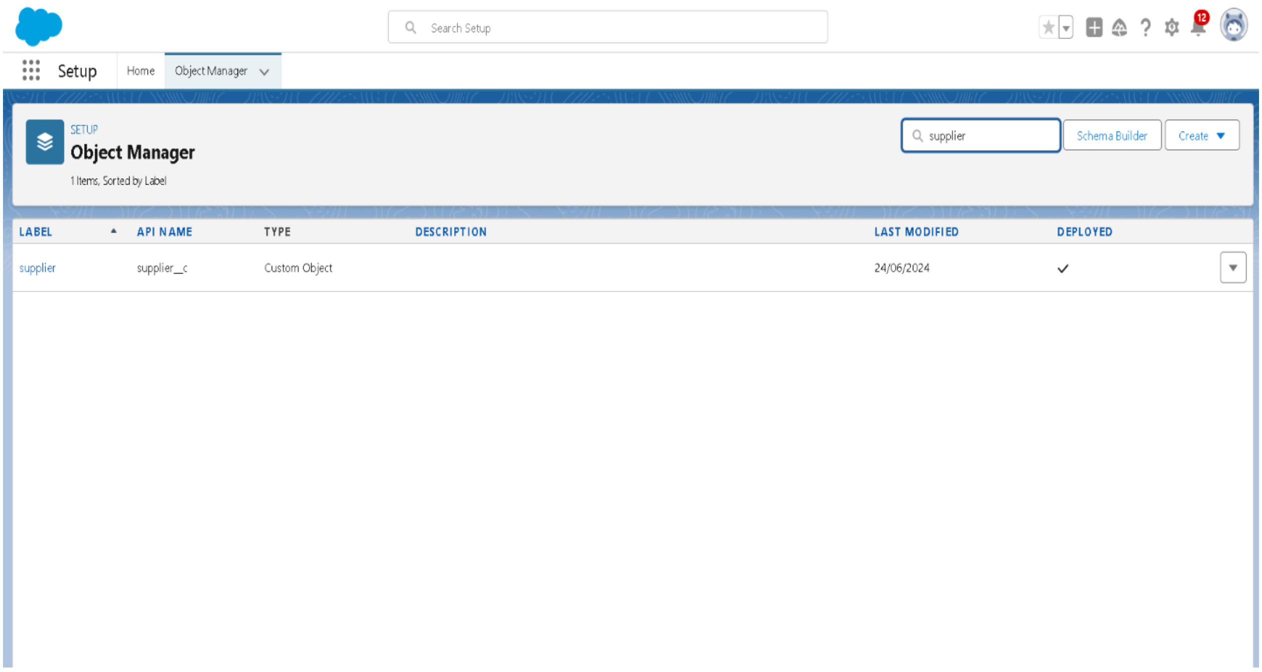
Salesforce objects are of two types:

1. **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

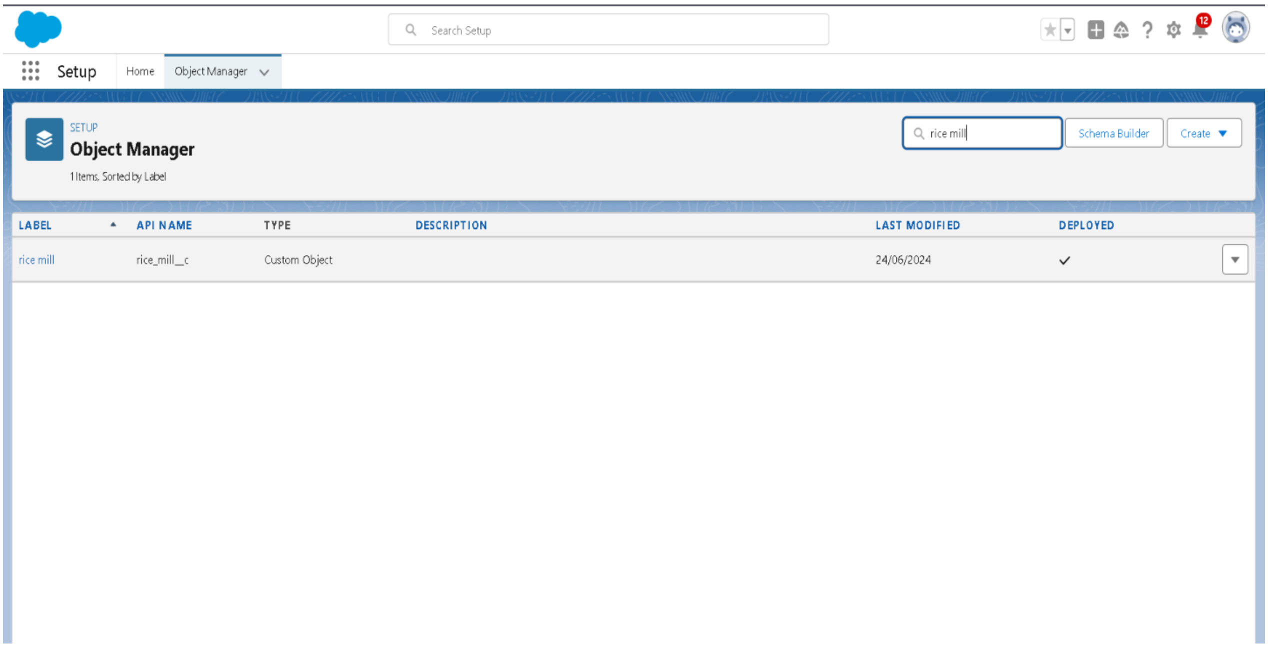
To Create an Object:

1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
2. On Custom object defining page:
3. Enter the label name, plural label name, click on Allow reports, Allow search.
4. Click Save.

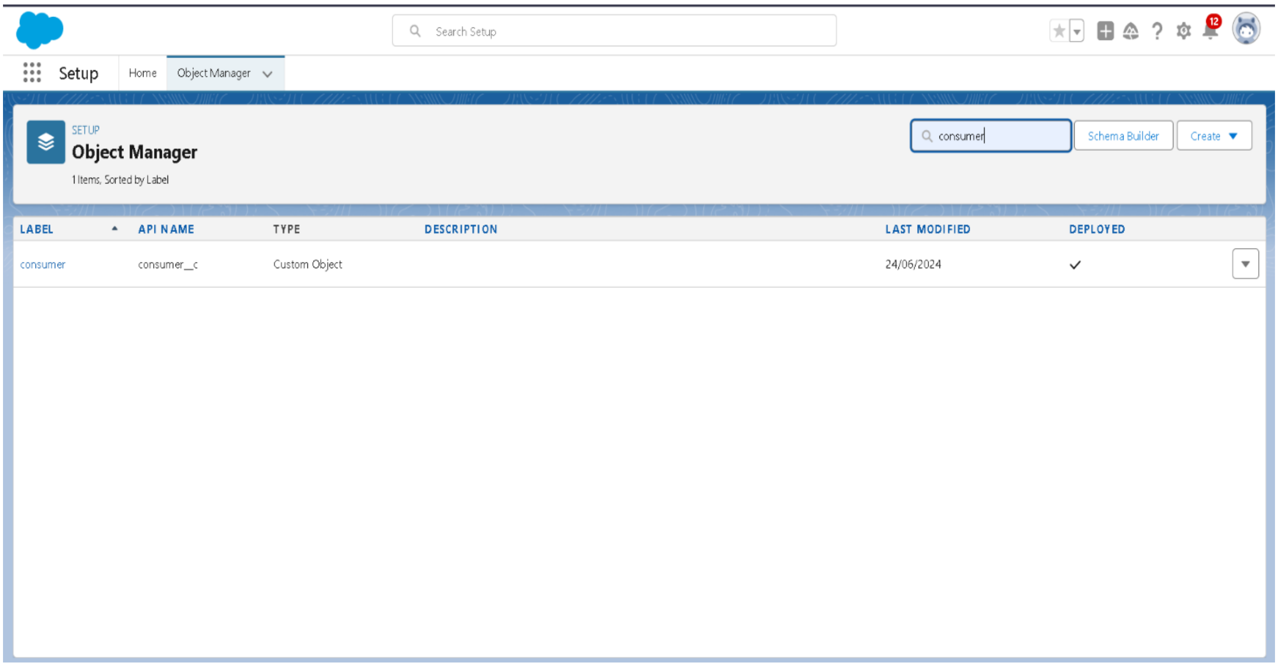
✓ Create Supplier Object



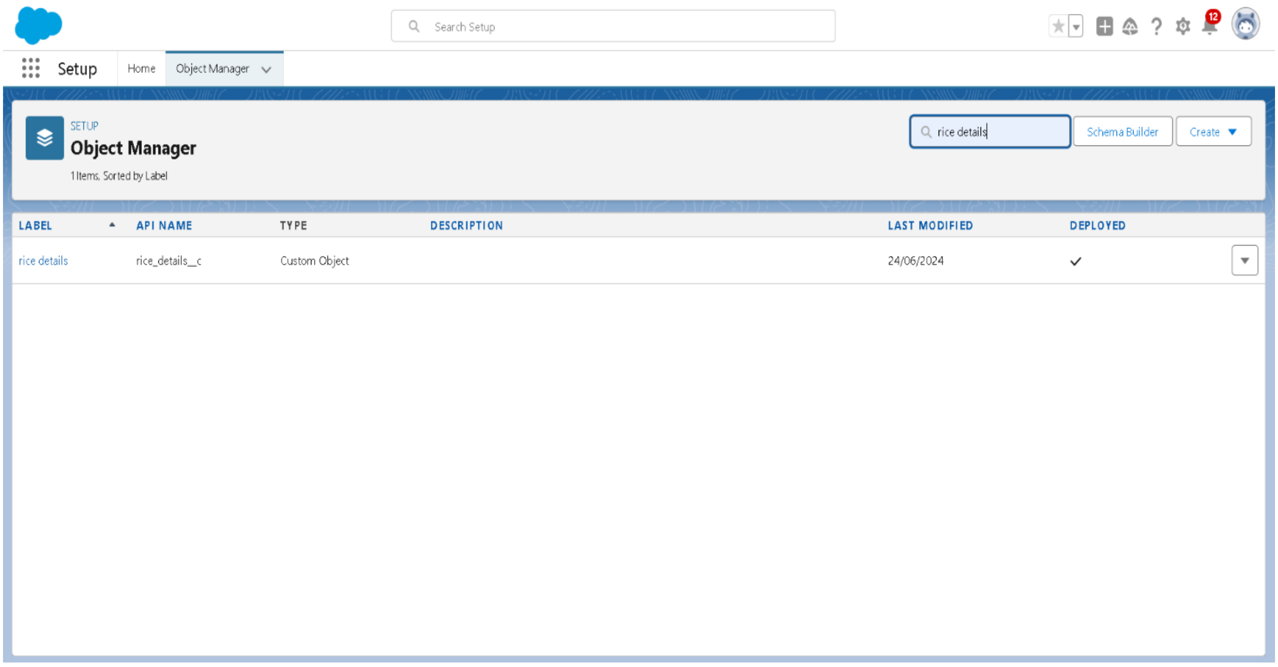
✓ Create Rice Mill Object



✓ Create Consumer Object



✓ Create Rice Details Object

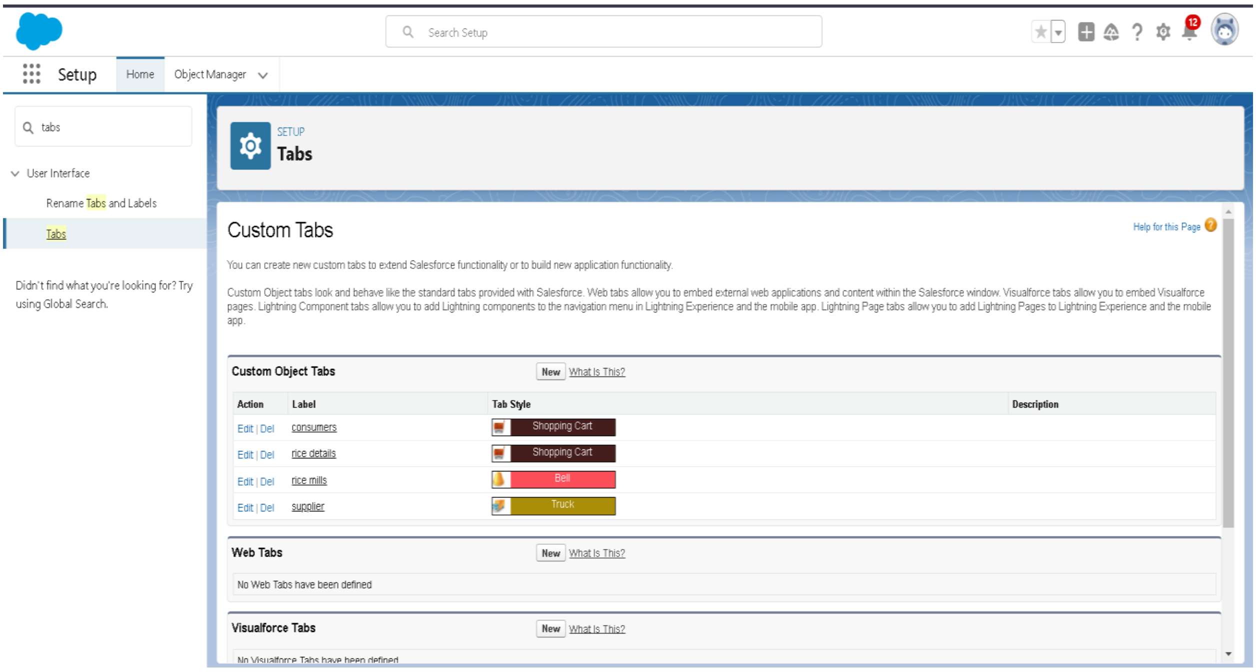


3. Tabs

A tab is like a user interface that is used to build records for objects and to view the records in the objects.

✓ Creating A Custom Tab and Remaining 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.



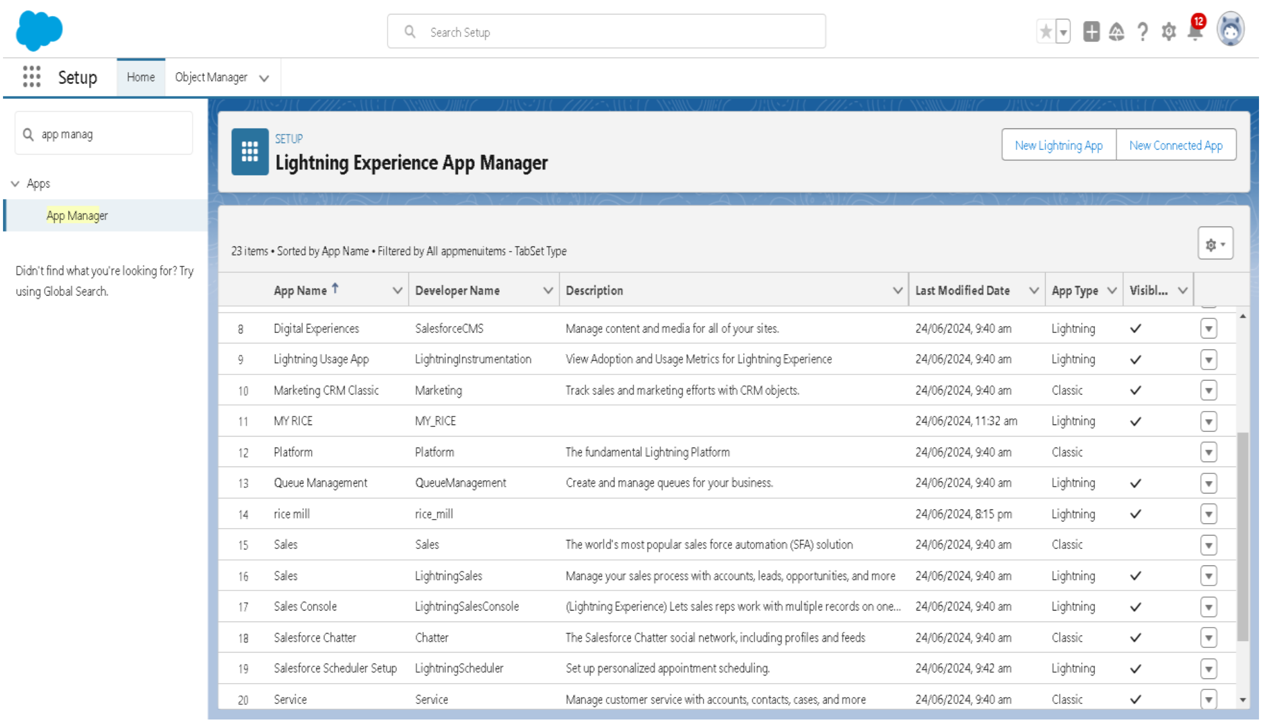
4. The Lightning App

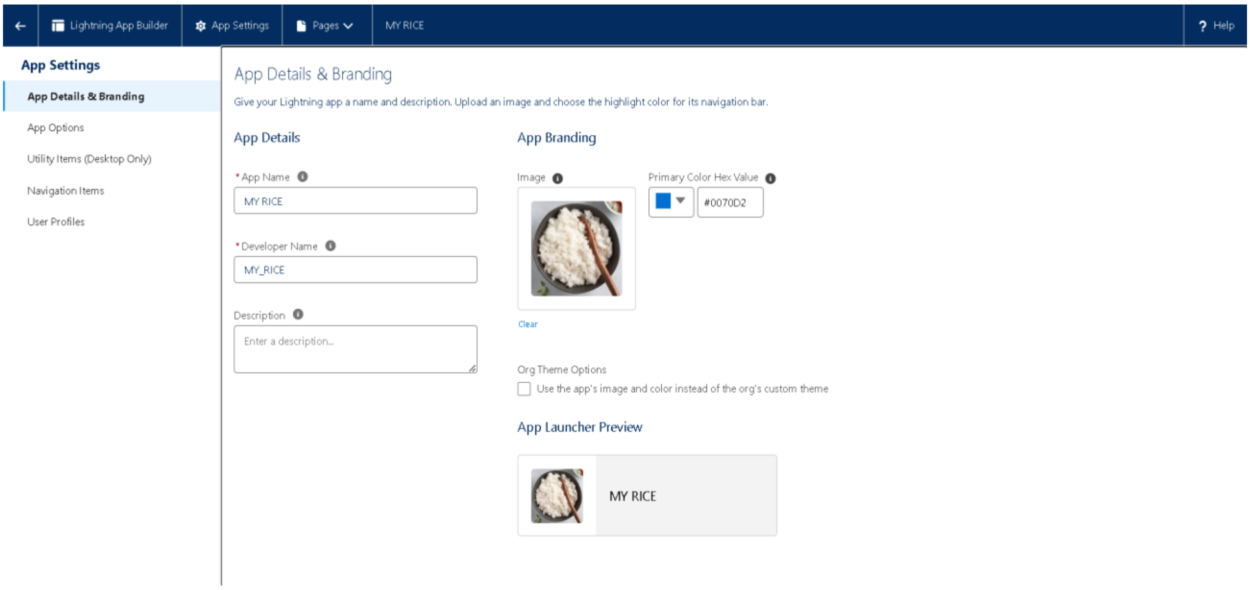
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom colour and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

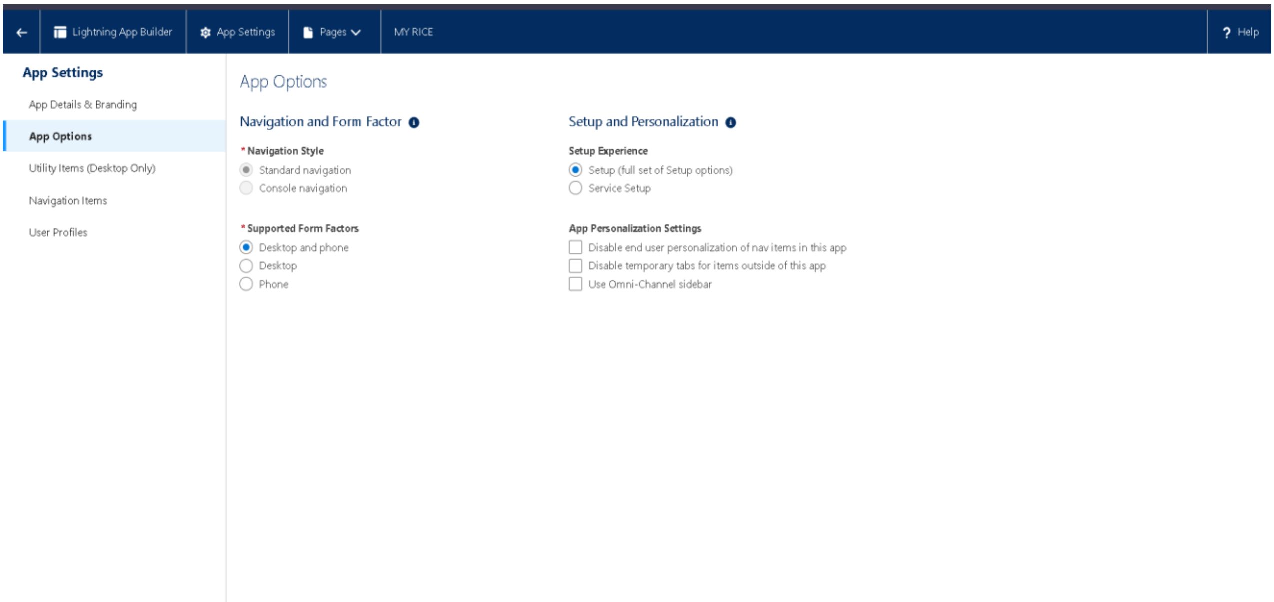
✓ Create A Lightning App

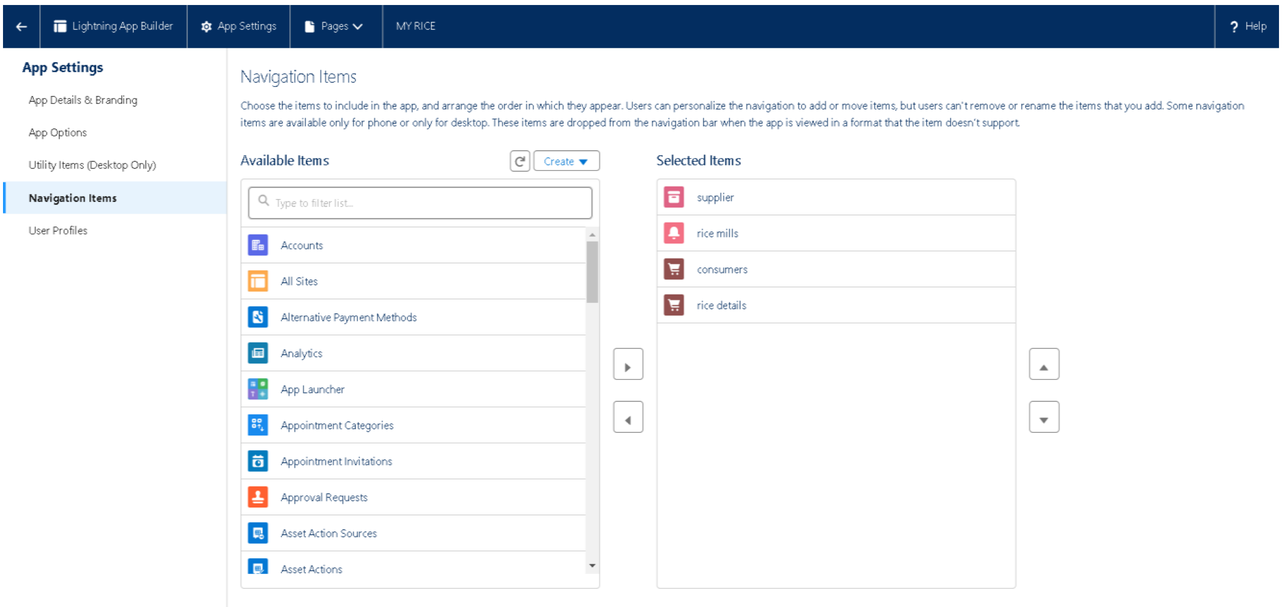
1. Go to setup page → search "app manager" in quick find → select "app manager" → click on new lightning App.
2. Fill the app name in app details as MY RICE →Next → (App option page) keep it as default → Next → (Utility Items) keep it as default → Next.
3. Upload a photo that is related to your app
4.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

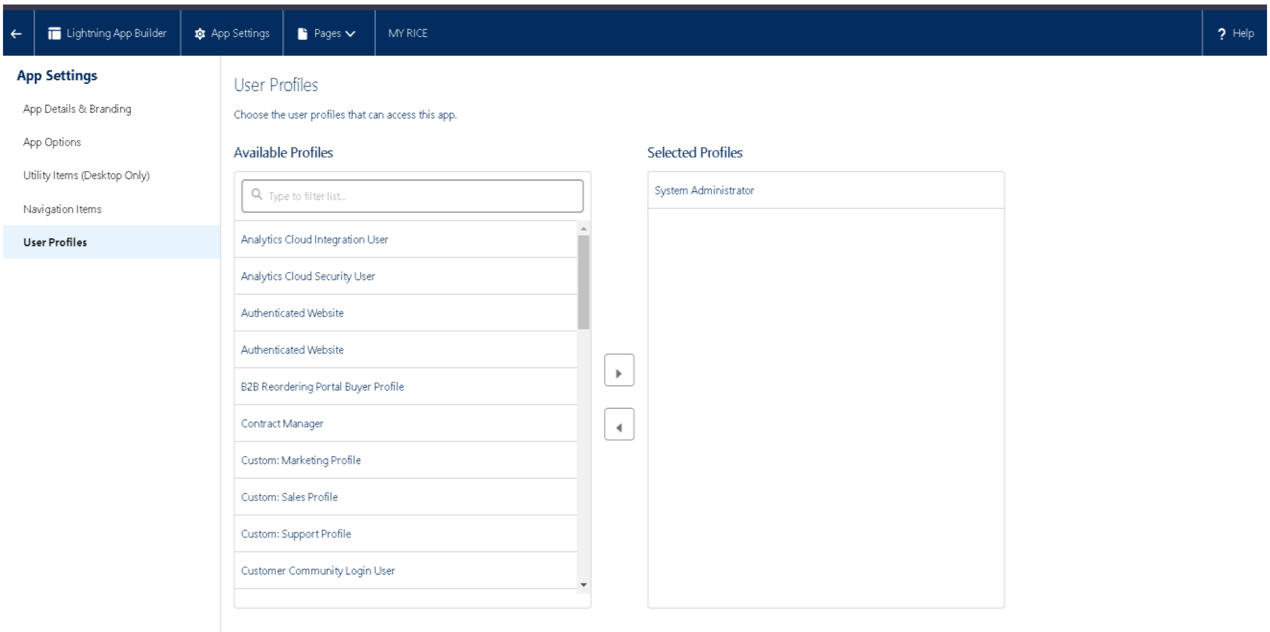
   Search profiles (System administrator) in the search bar → click on the arrow button → save & finish.




Lightning App Builder
App Settings
Pages
MY RICE
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
App Details & Branding
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
* App Name
MY RICE
* Developer Name
MY_RICE
Description
Enter a description...
App Branding
Image
Clear
Primary Color Hex Value
#0070D2
Org Theme Options
Use the app's image and color instead of the org's custom theme
App Launcher Preview
MY RICE


Lightning App Builder
App Settings
Pages
MY RICE
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
App Options
Navigation and Form Factor
* Navigation Style
Standard navigation
Console navigation
* Supported Form Factors
Desktop and phone
Desktop
Phone
Setup and Personalization
Setup Experience
Setup (full set of Setup options)
Service Setup
App Personalization Settings
Disable end user personalization of nav items in this app
Disable temporary tabs for items outside of this app
Use Omni-Channel sidebar


Lightning App Builder
App Settings
Pages
MY RICE
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
Navigation Items
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
Available Items
Create
Type to filter list...
Accounts
All Sites
Alternative Payment Methods
Analytics
App Launcher
Appointment Categories
Appointment Invitations
Approval Requests
Asset Action Sources
Asset Actions
Selected Items
supplier
rice mills
consumers
rice details

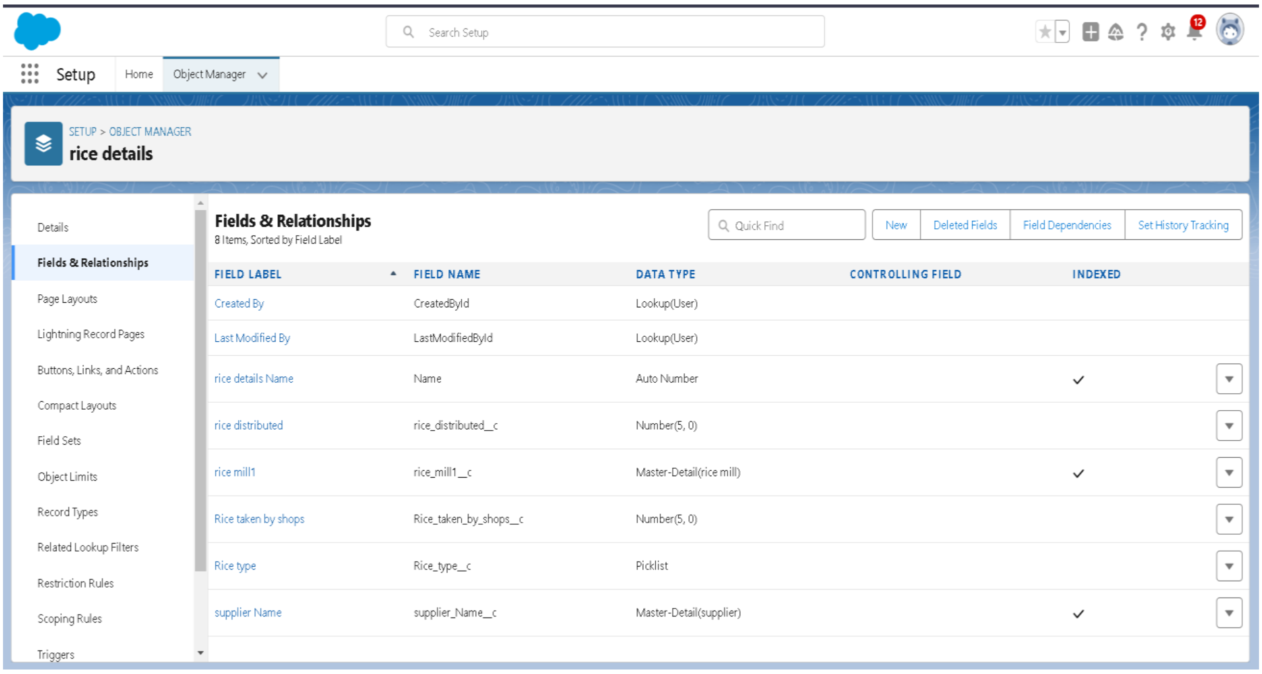


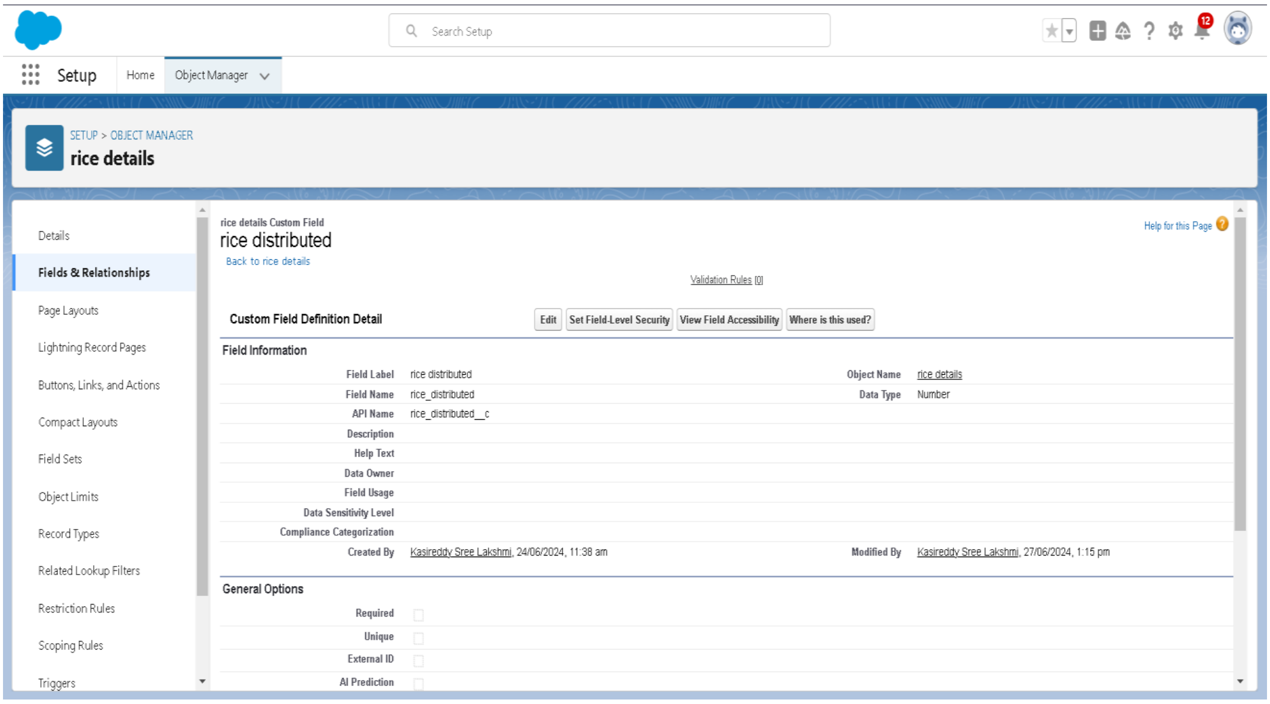
5. Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

✓ Creating The Number Fields 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”.
5. Field Name will be auto populated, and click on Next- Next >> Save.

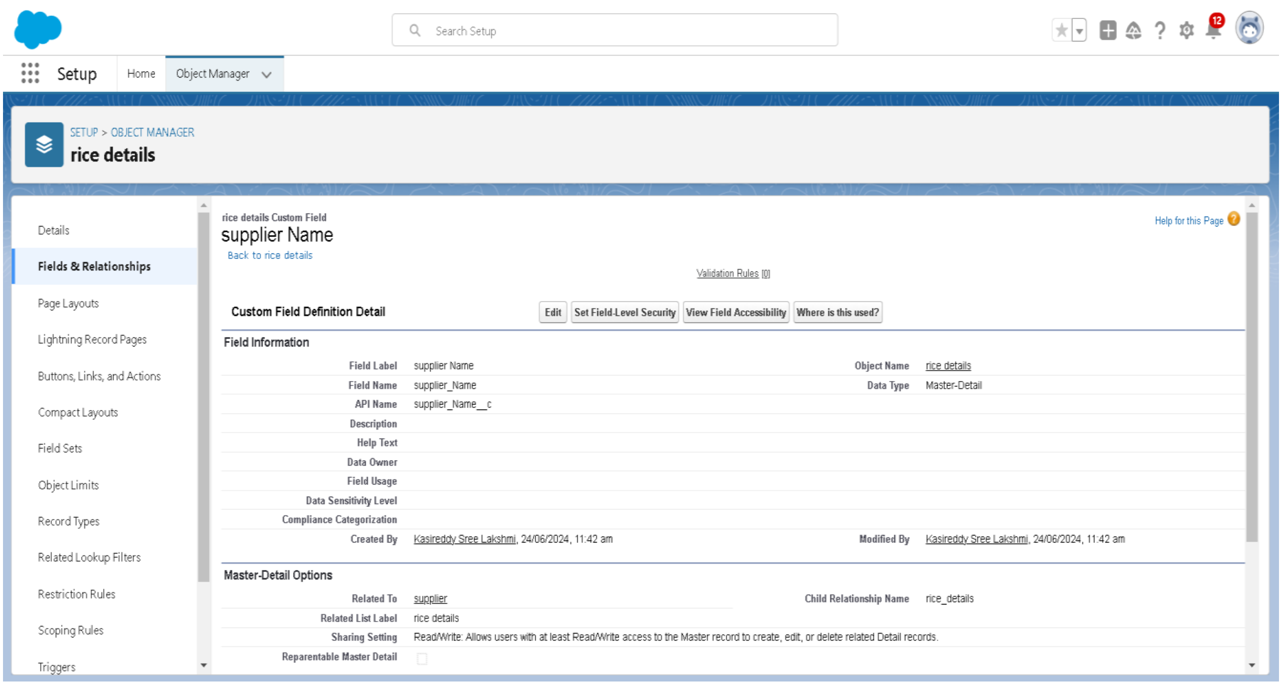


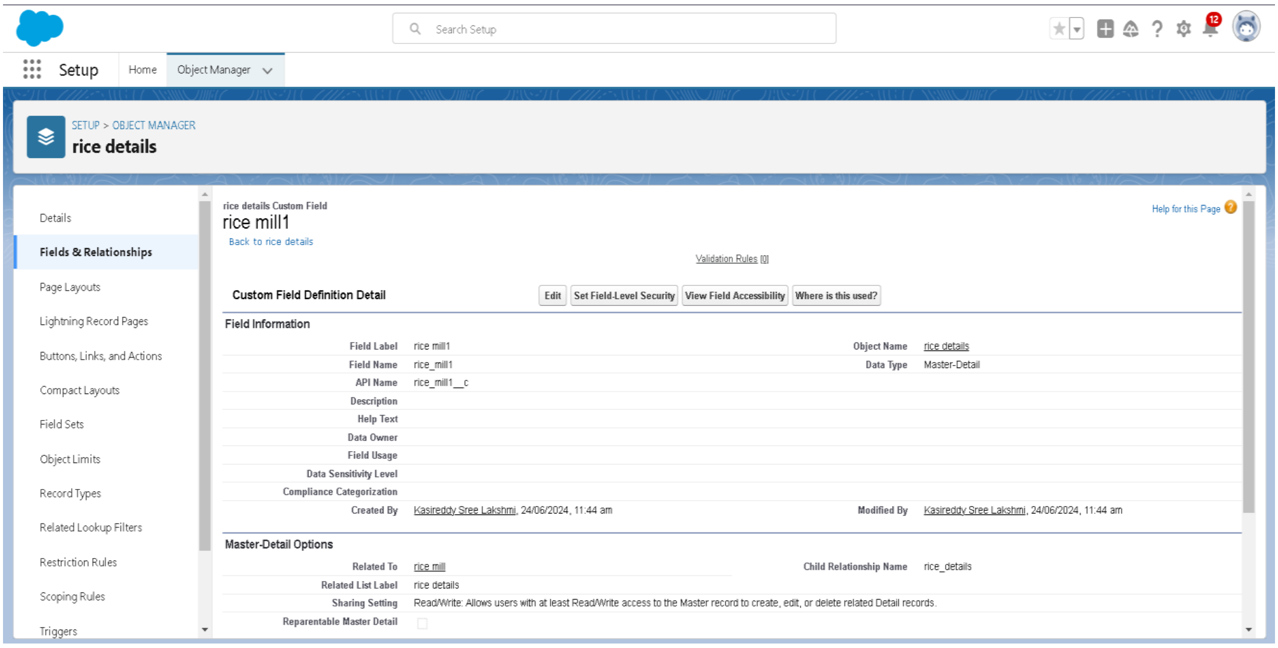


✓ Creating The Junction Object

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.

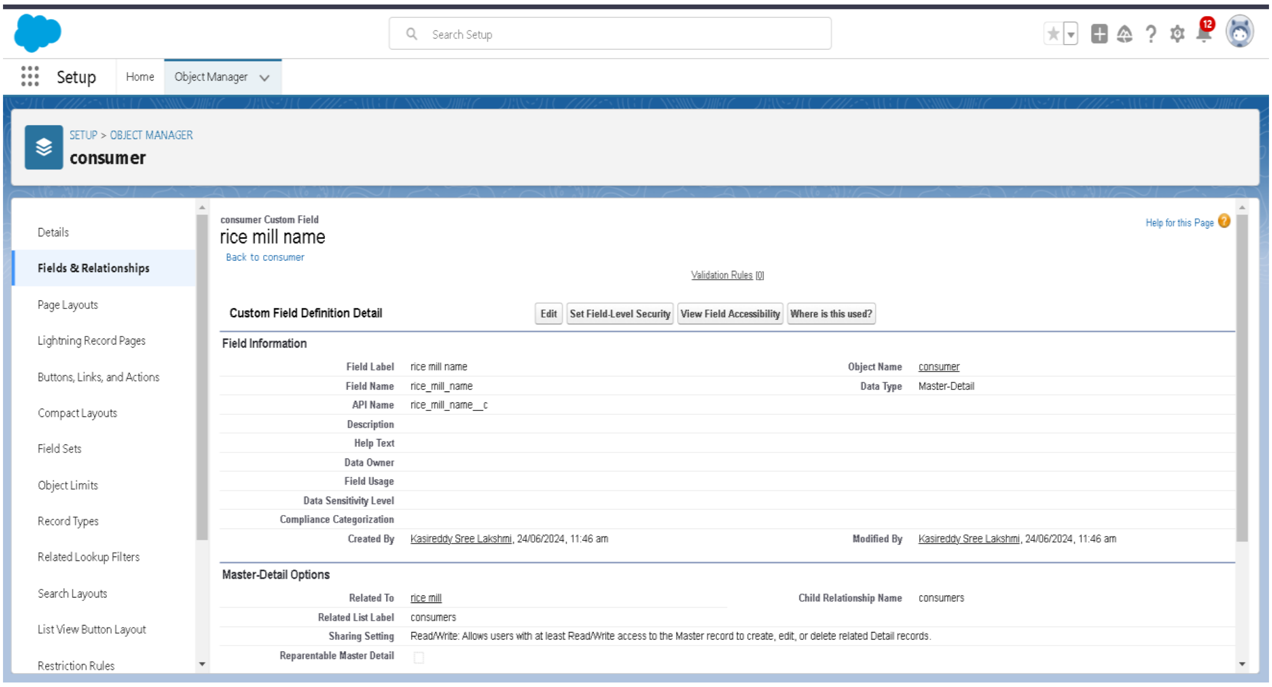
3. Select “Master-Detail relationship” as data type and click Next.
4. Select the related object “supplier” and click next.
5. Give Field Label as “supplier Name” and click Next
6. Next → Next → Save & New.
7. Follow the same steps from 1 to 3.
8. Select the related object “rice mill” and click Next.
9. Give Field Label as “rice mill 1(one)” and click Next.
10. Next → Next → Save.





✓ Creating A Master-Detail Relationship

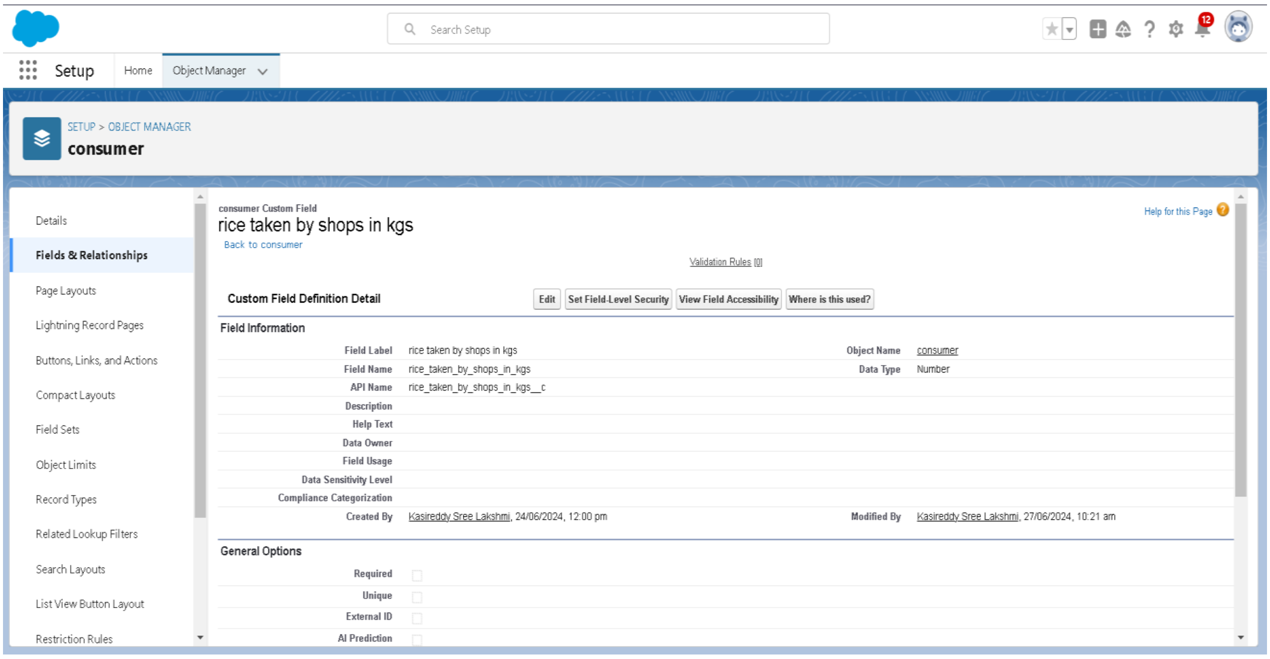
1. Go to the setup page → click on object manager → From drop down click edit for consumer object.
2. Click on fields & relationship → click on New.
3. Select "Master-Detail relationship" as data type and click Next.
4. Select the related object "rice mill".
5. Give Field Label as "rice mill name" and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



✓ Creating A Roll-Up Summary

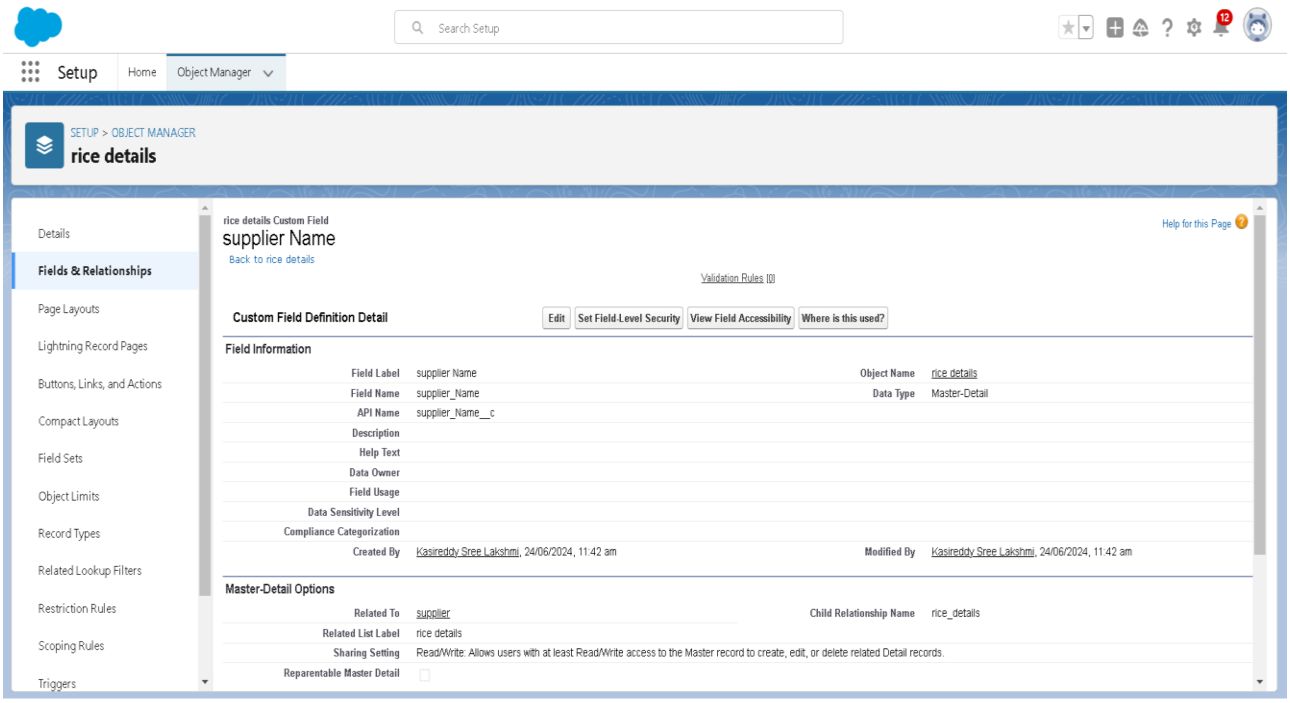
1. Go to setup → click on Object Manager → type object name(supplier) in search bar → click on the object.
2. Now click on "Fields & Relationships" → New
3. Select the data type as "Rollup summary", and click Next.
4. Give the Field label as "sum of rice distributed", Field Name will be Auto generated, 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.



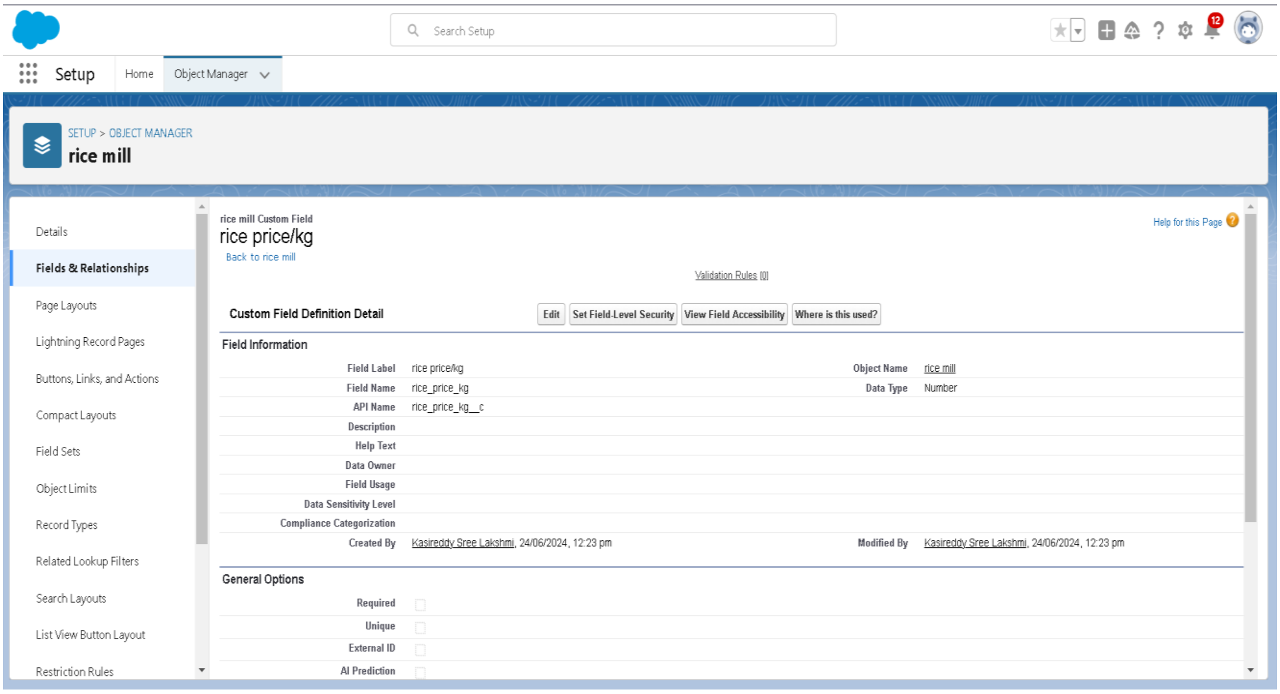
✓ Creating Fields in Object

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 “master detail” 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.

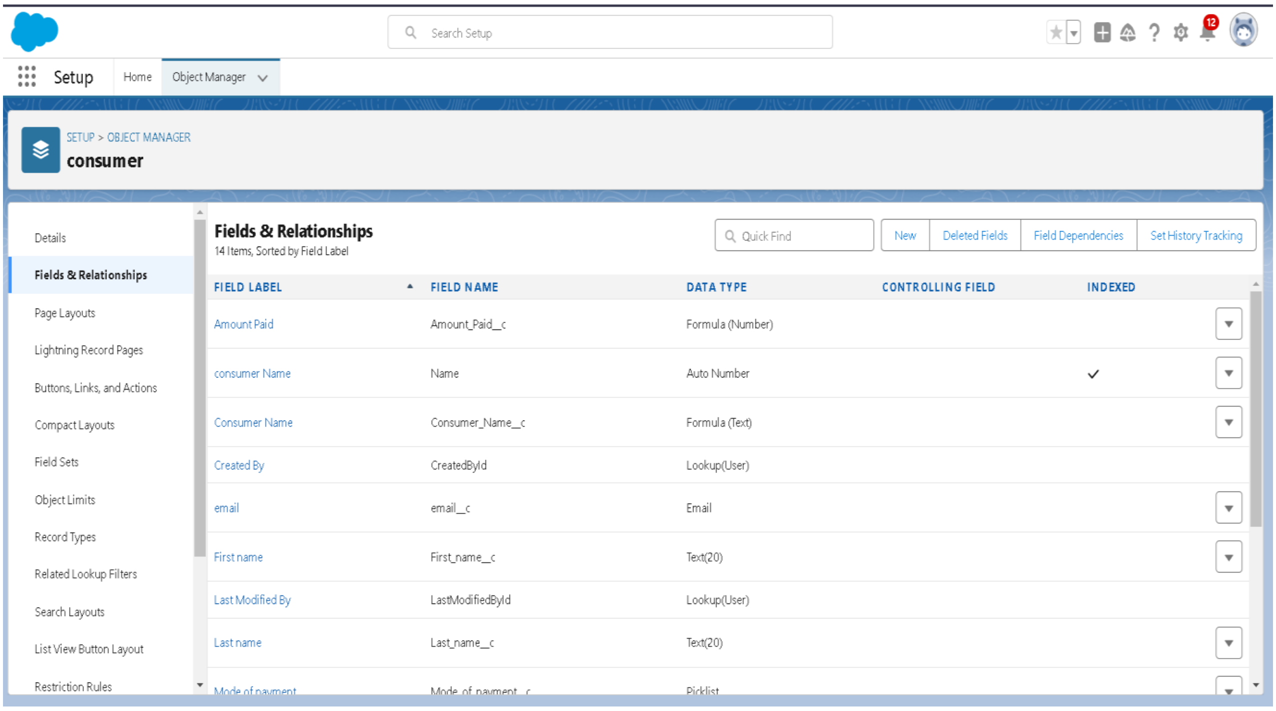


✓ Creating Fields in Rice Mill Objects

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



✓ Creating Fields in Consumer Objects



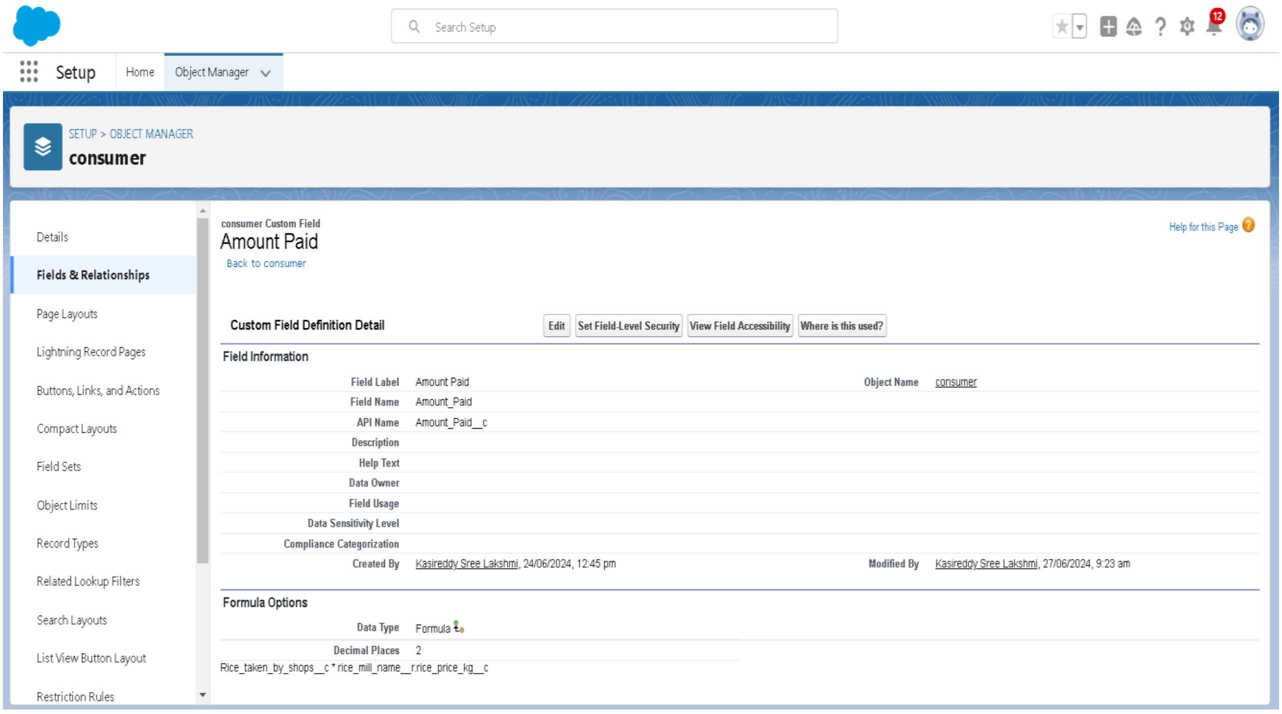
✓ Creating Cross Object Formula Field in Consumer Object

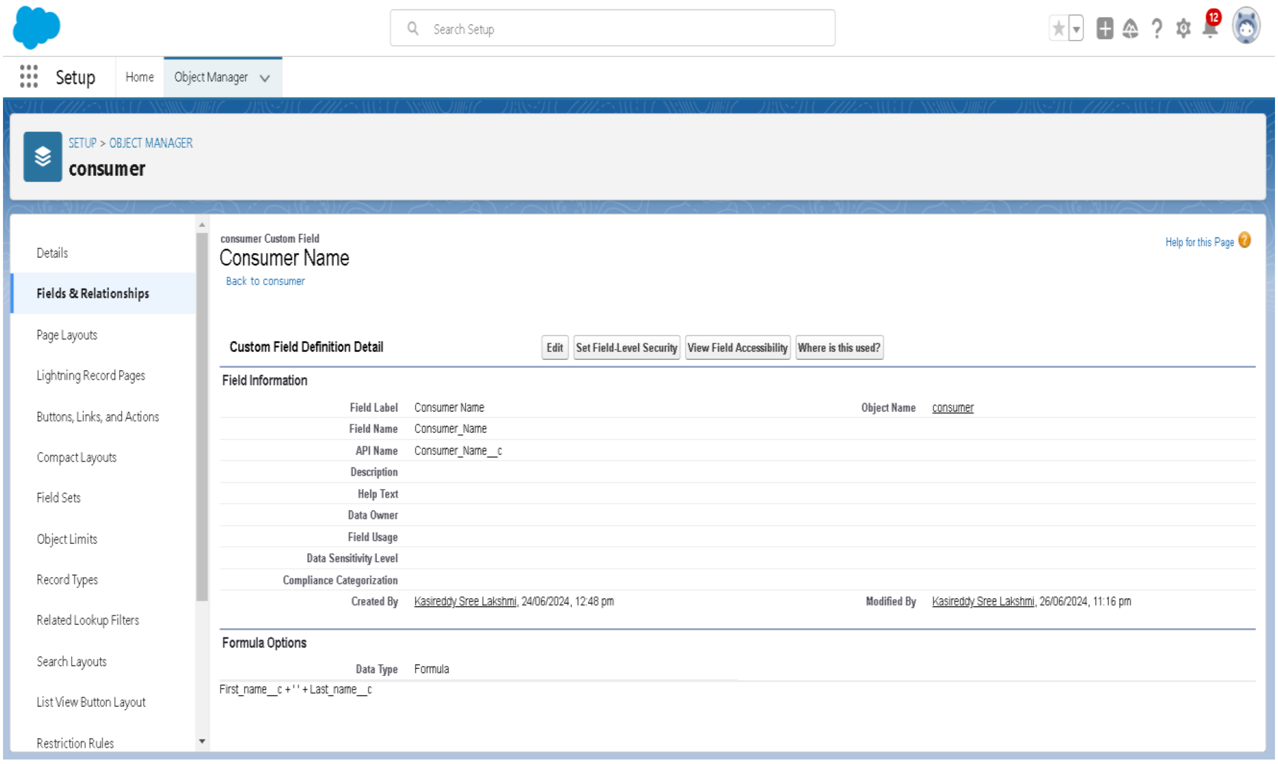
1. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Amount Paid" and select formula return type as "Number" 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.
7. Creating the Formula field in consumer Object
8. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
9. Click on fields & relationship >> click on New.
10. Select Data type as "Formula" and click Next.
11. Give Field Label and Field Name as "Consumer Name" and select formula return type as "TEXT" and click next.
12. Insert field formula should be: First_Name__c + ' ' + Last_Name__c

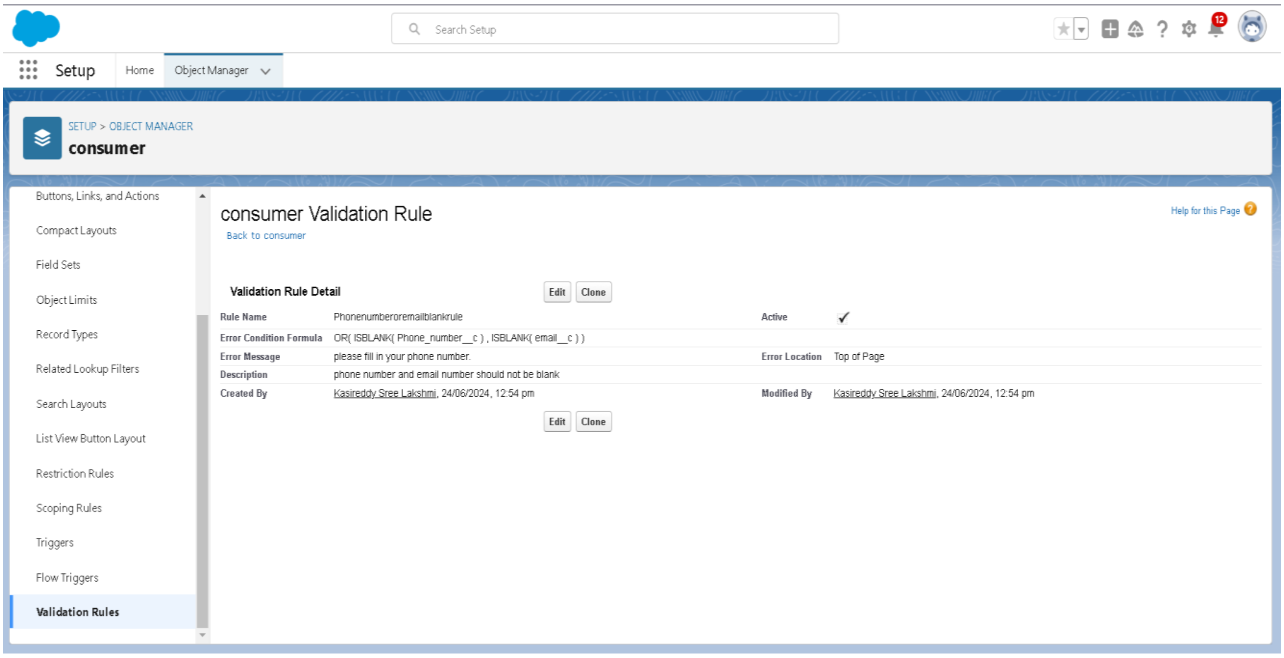
13. click “Check Syntax” and save.





✓ Creating The Validation Rule

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.



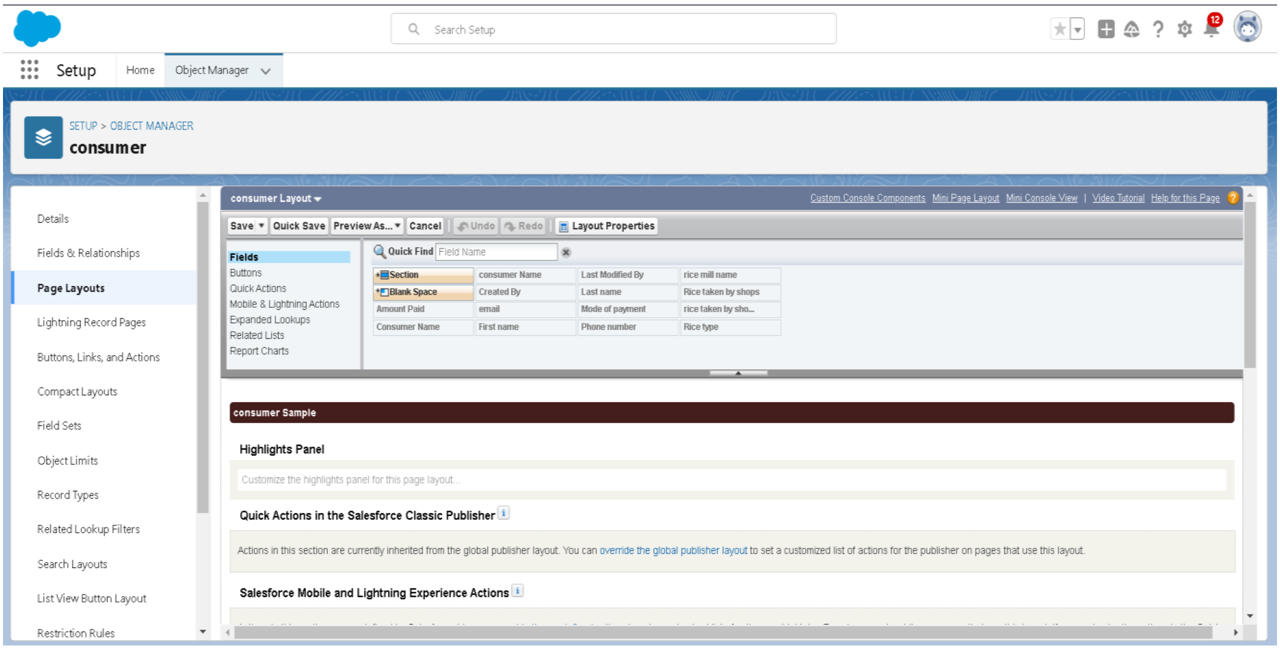
6. Page Layouts

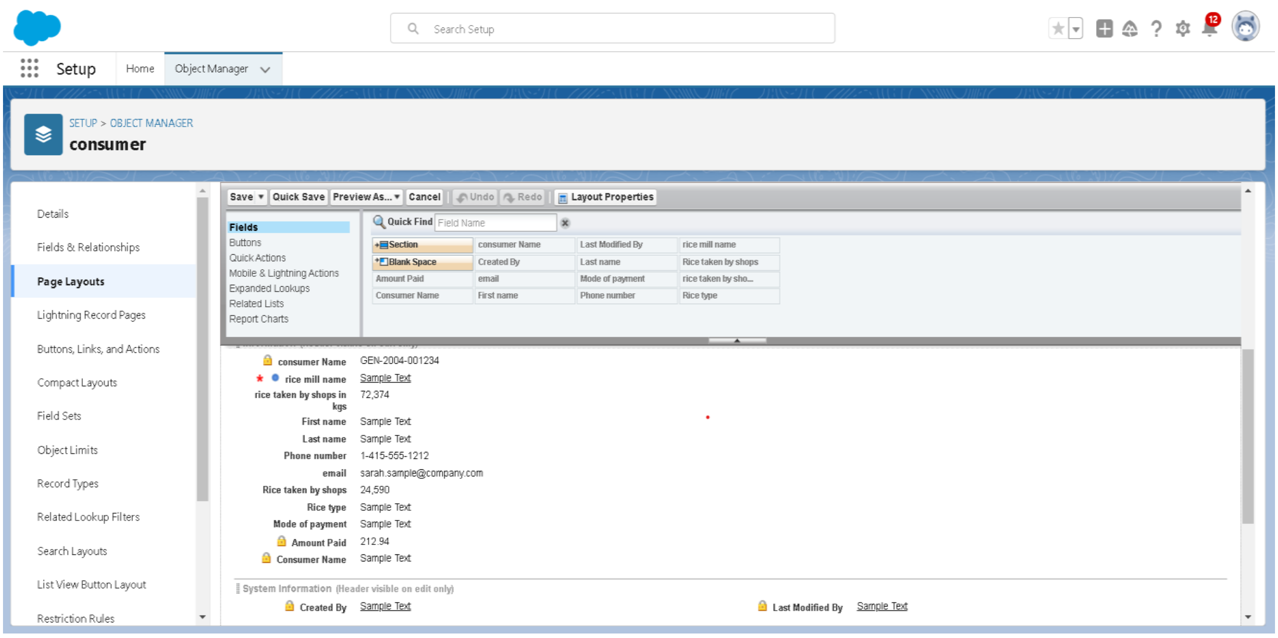
✓ Creating The Page Layouts

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.



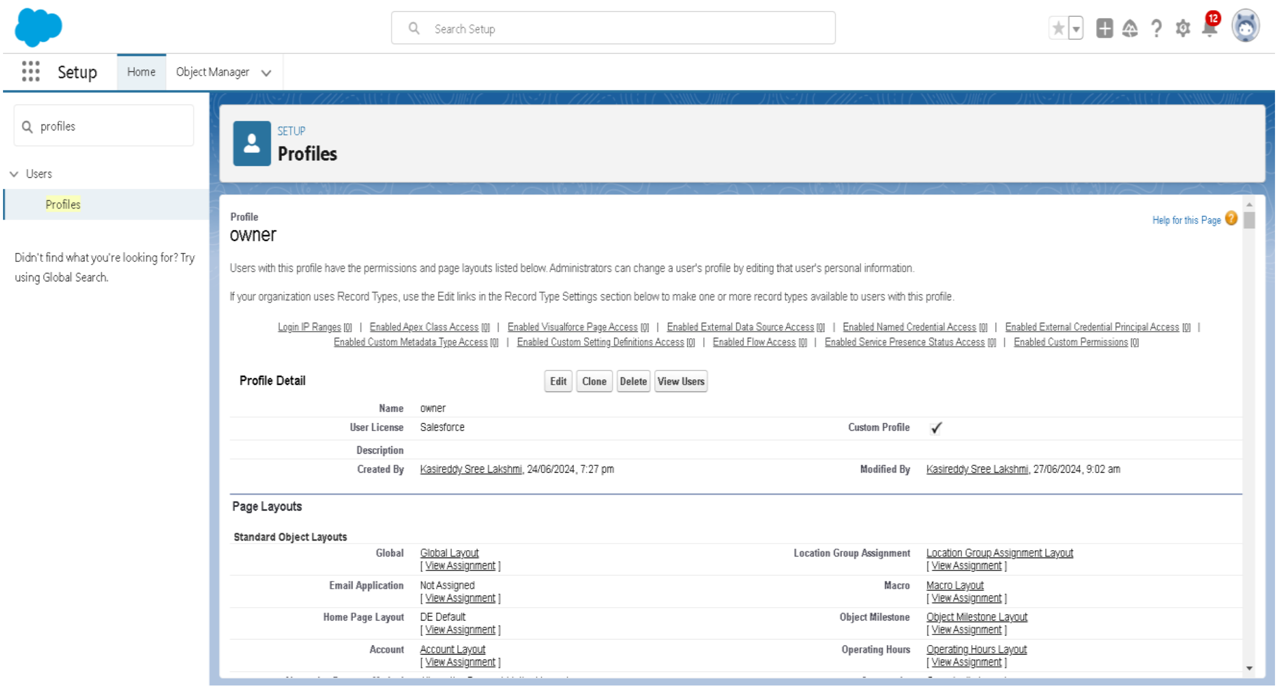


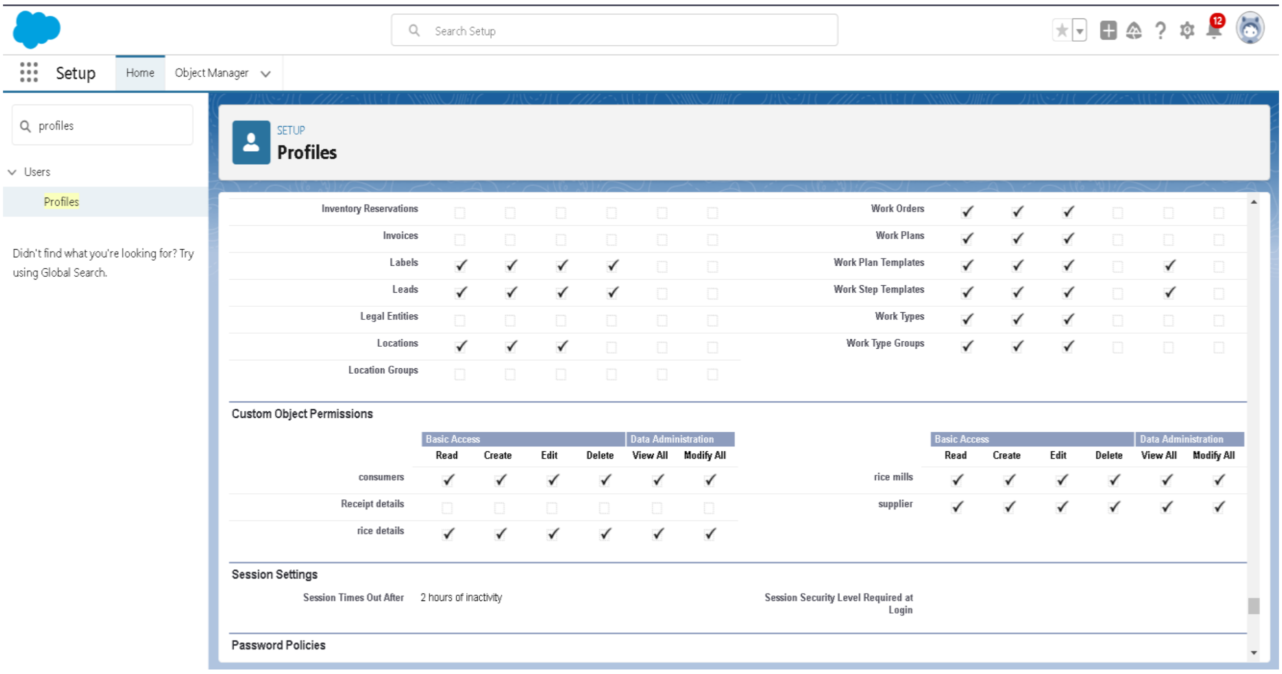
7. Profiles

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example, System Administrator, Developer, Sales Representative.

✓ Owner Profile

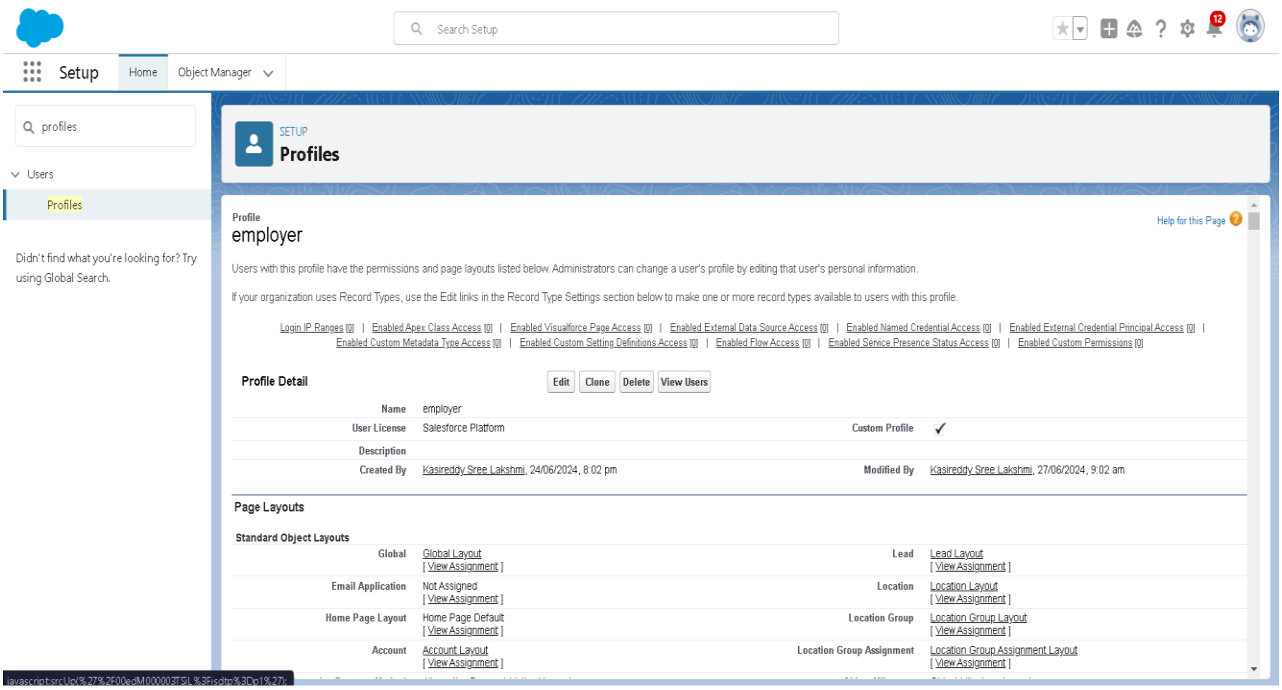
1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >>enter profile name (owner) >> Save.
2. Scroll down to Custom Object Permissions and Give access permissions for consumers, rice details, rice mill and suppliers objects.
3. Give access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

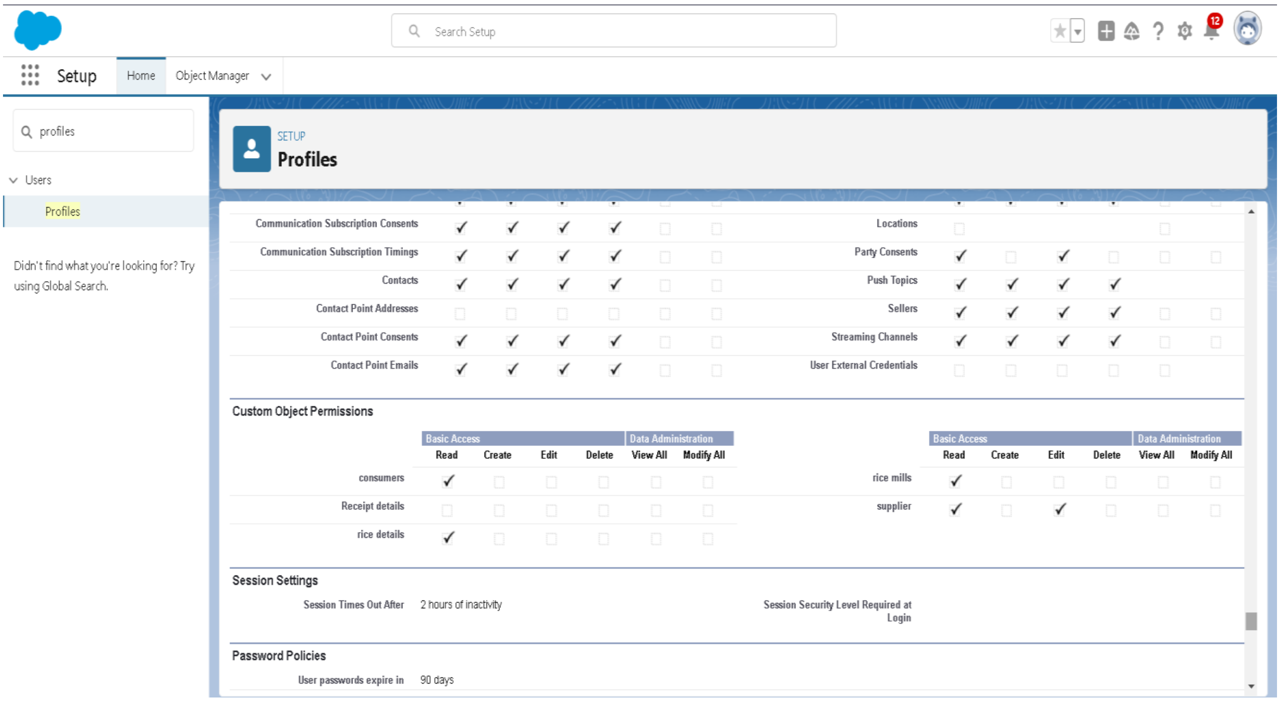




✓ Employer Profile

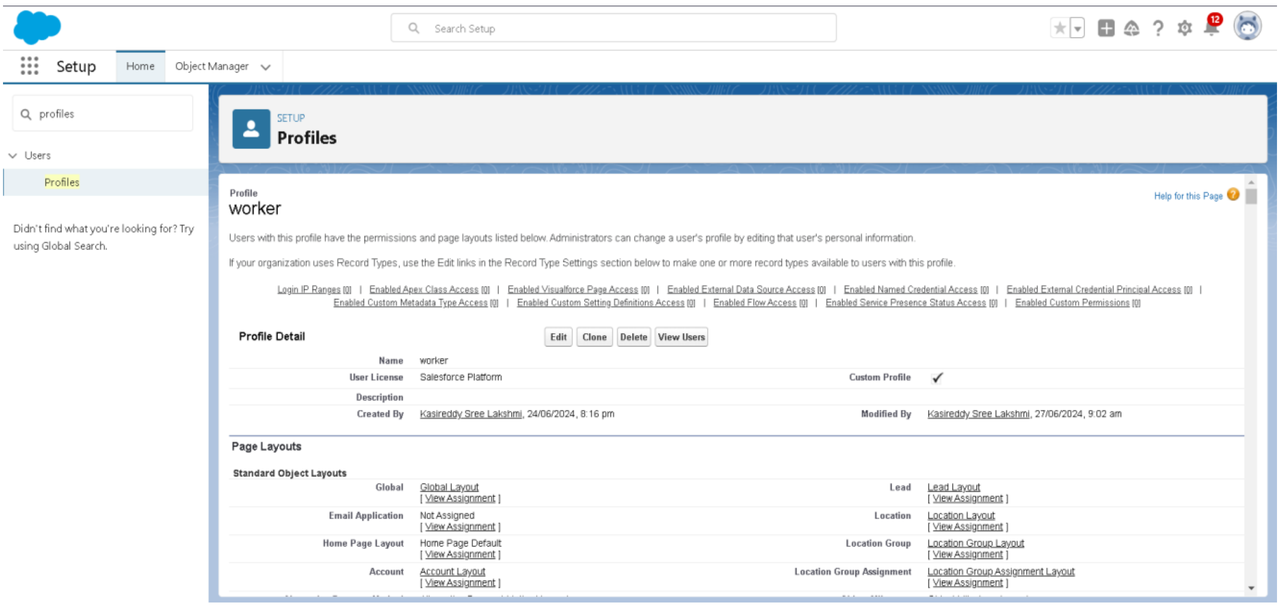
1. Go to setup >> type profiles in quick find box >>click on profiles >> clone the desired profile (Standard Platform User) >> enter profile name (employer) >> Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the rice mill.
4. Scroll down to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

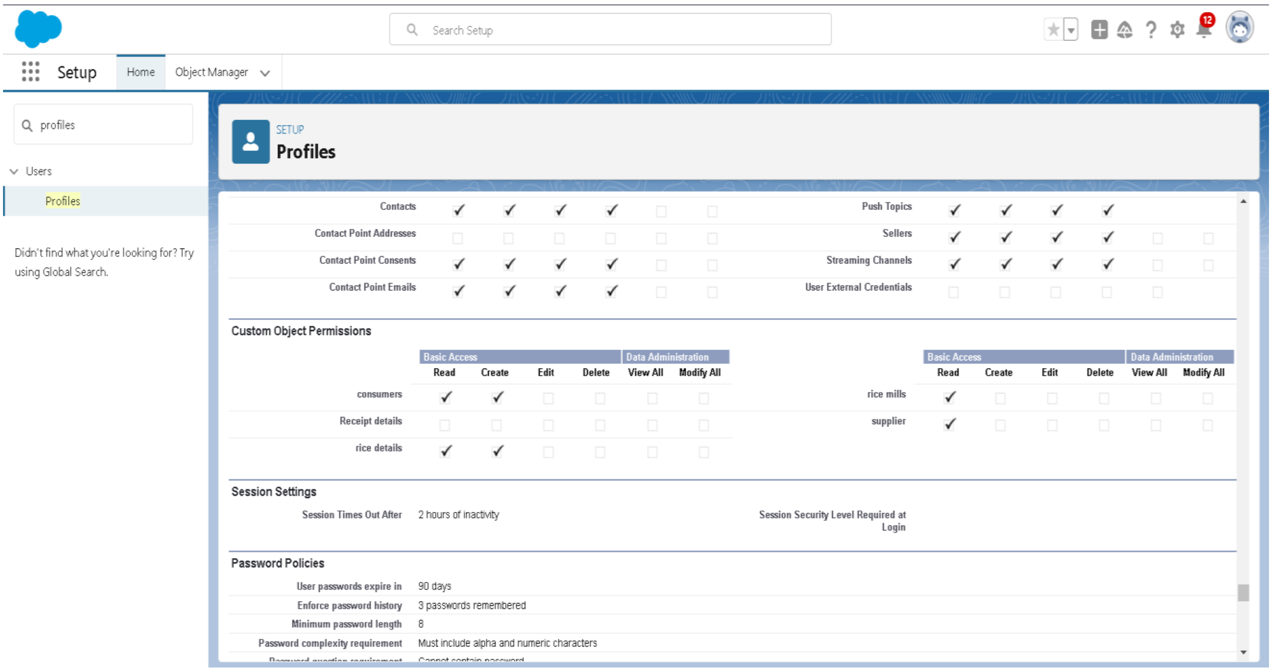




✓ Worker Profile

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
5. And click save.



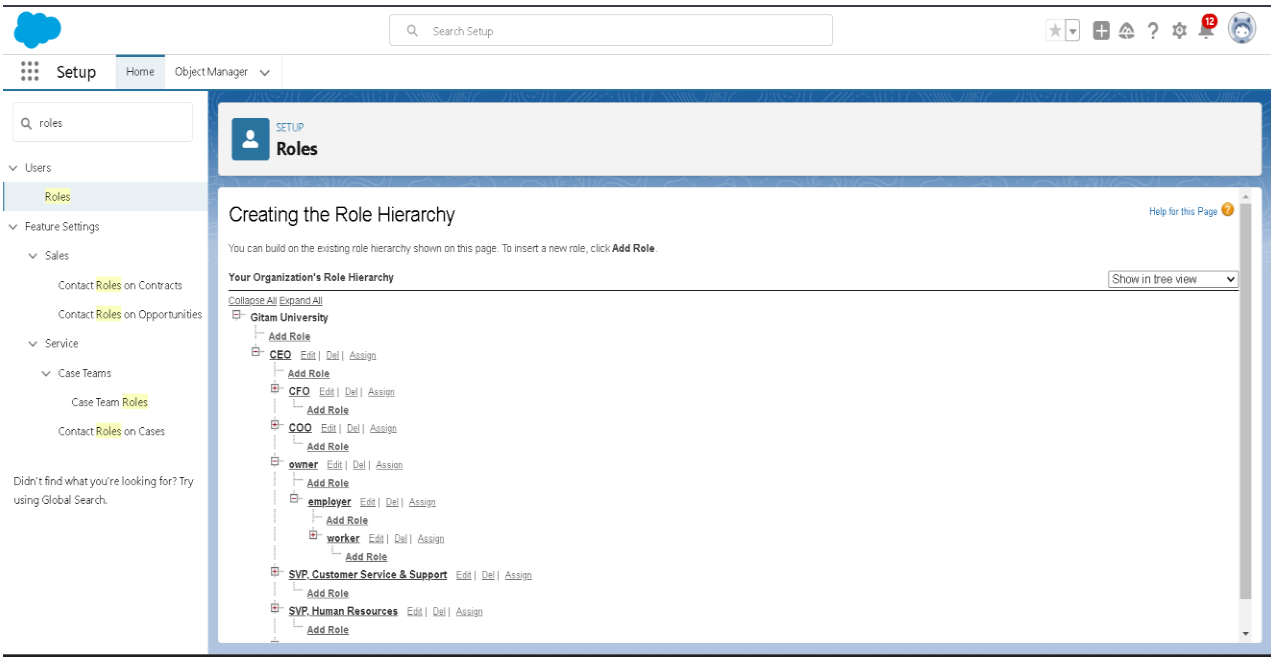


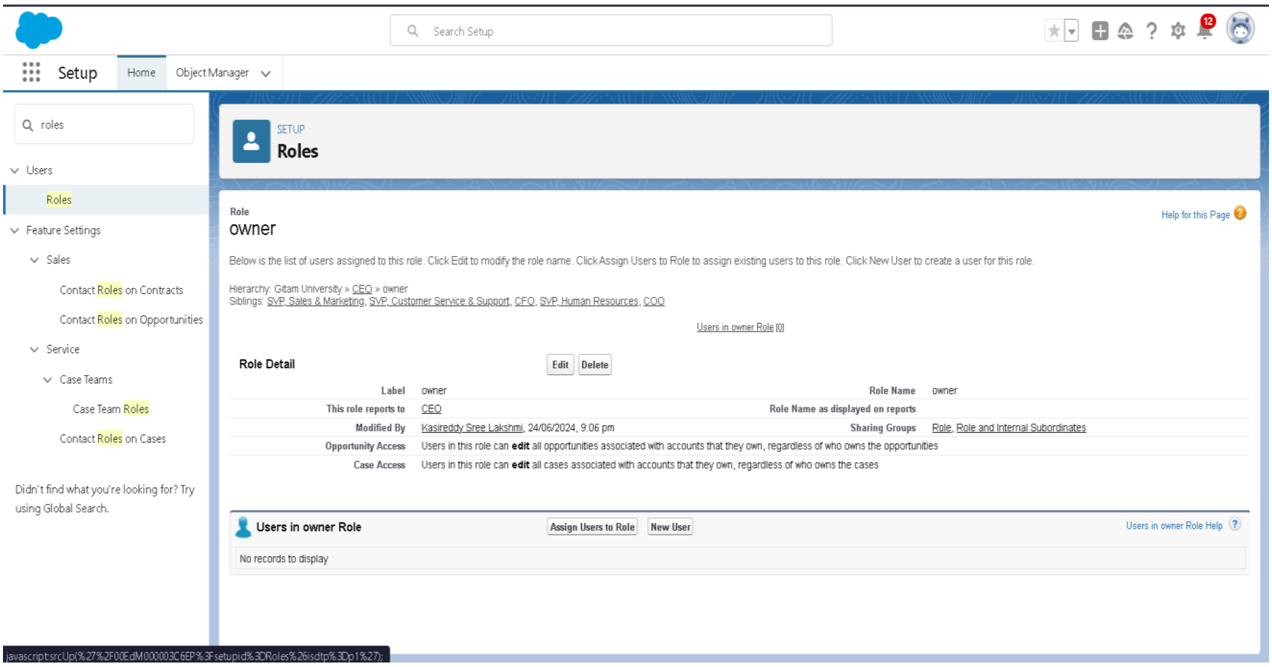
8. Role and Role Hierarchy

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

✓ Creating Owner Role

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

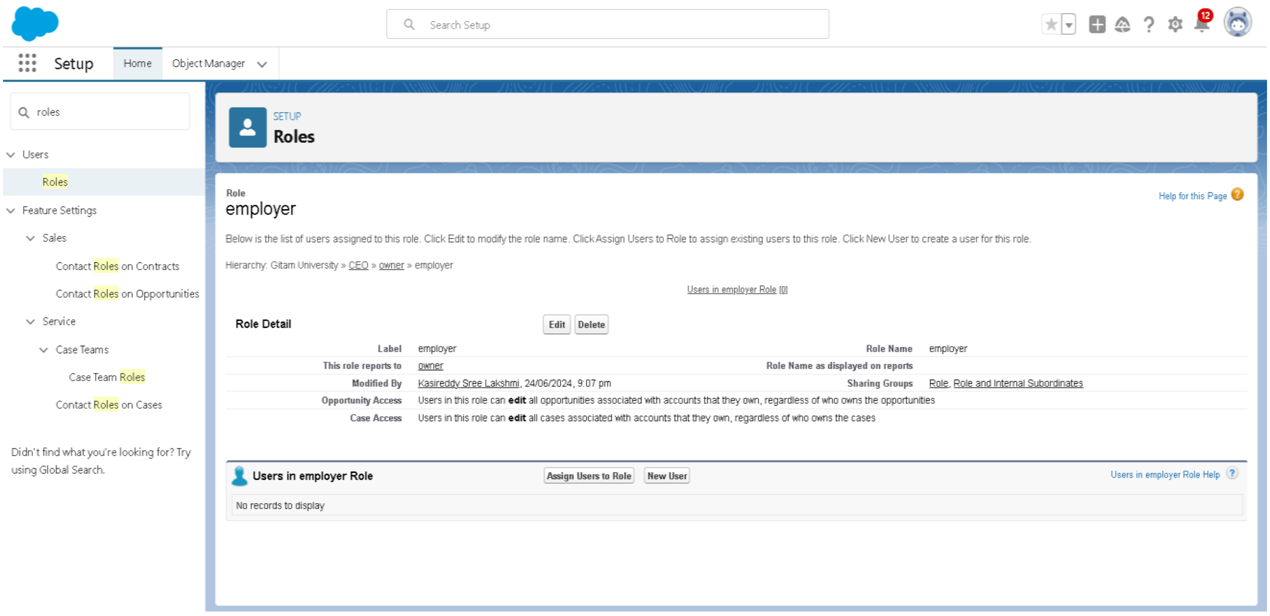


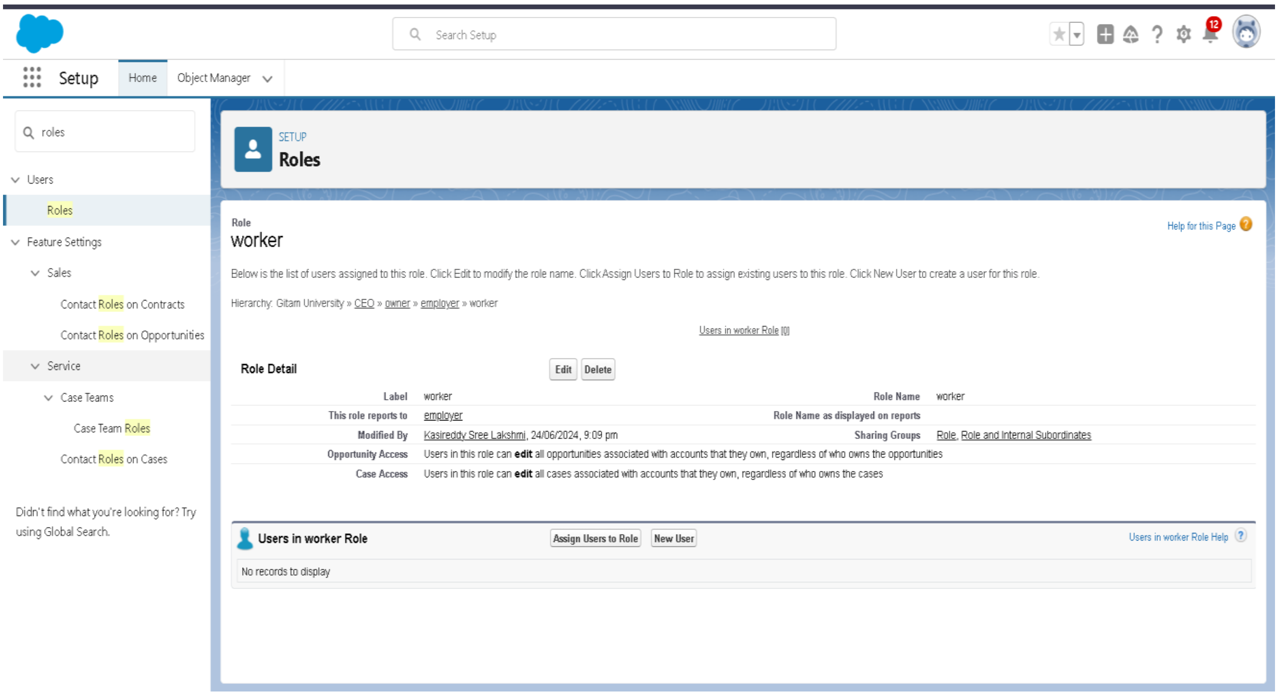


✓ Creating Employer Role

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.



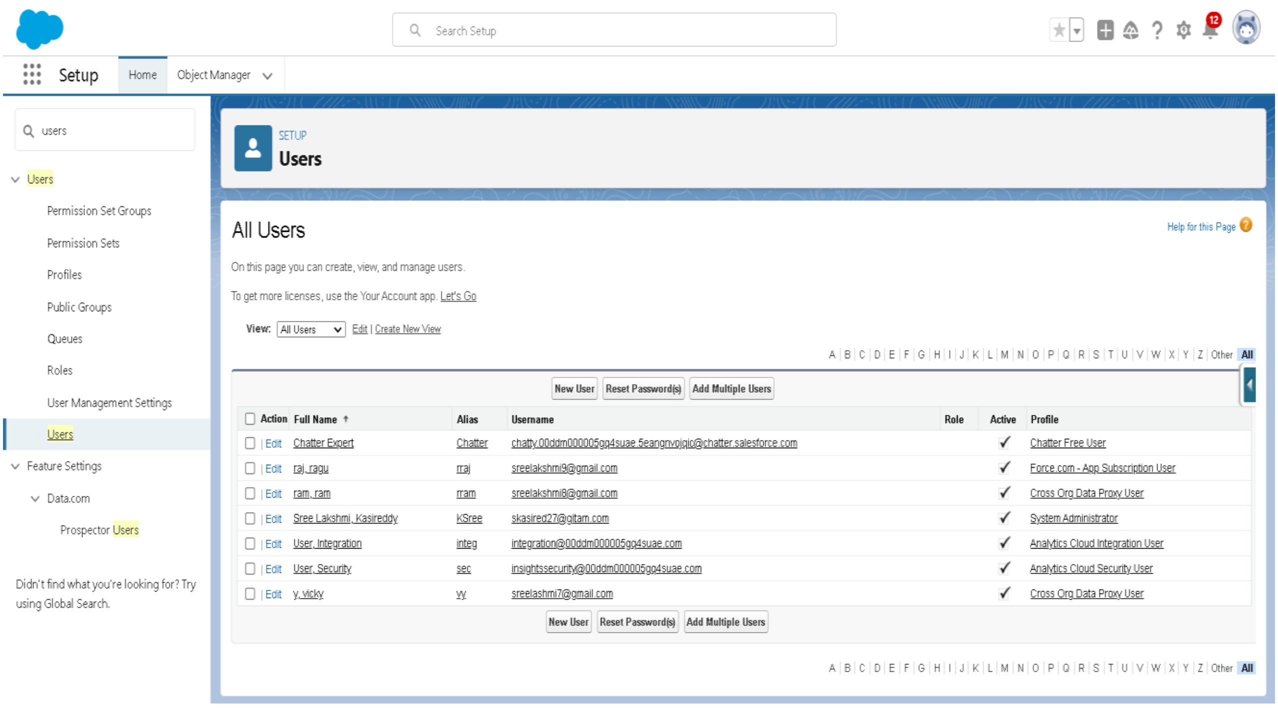


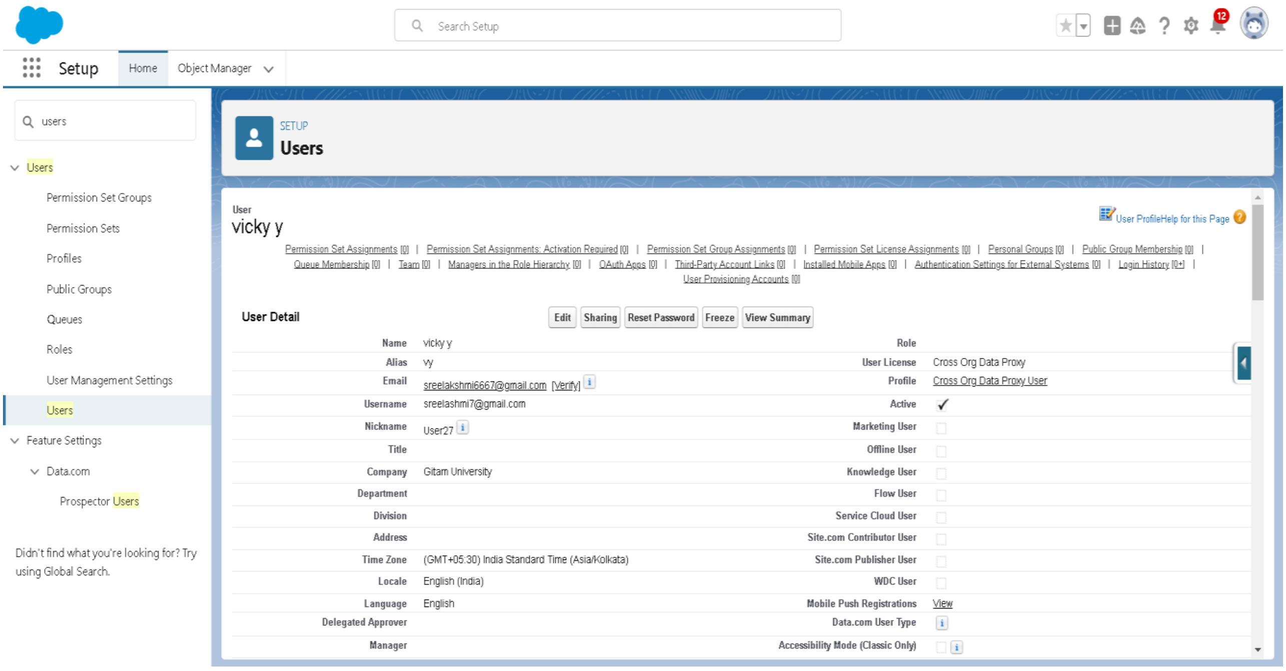
9. Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

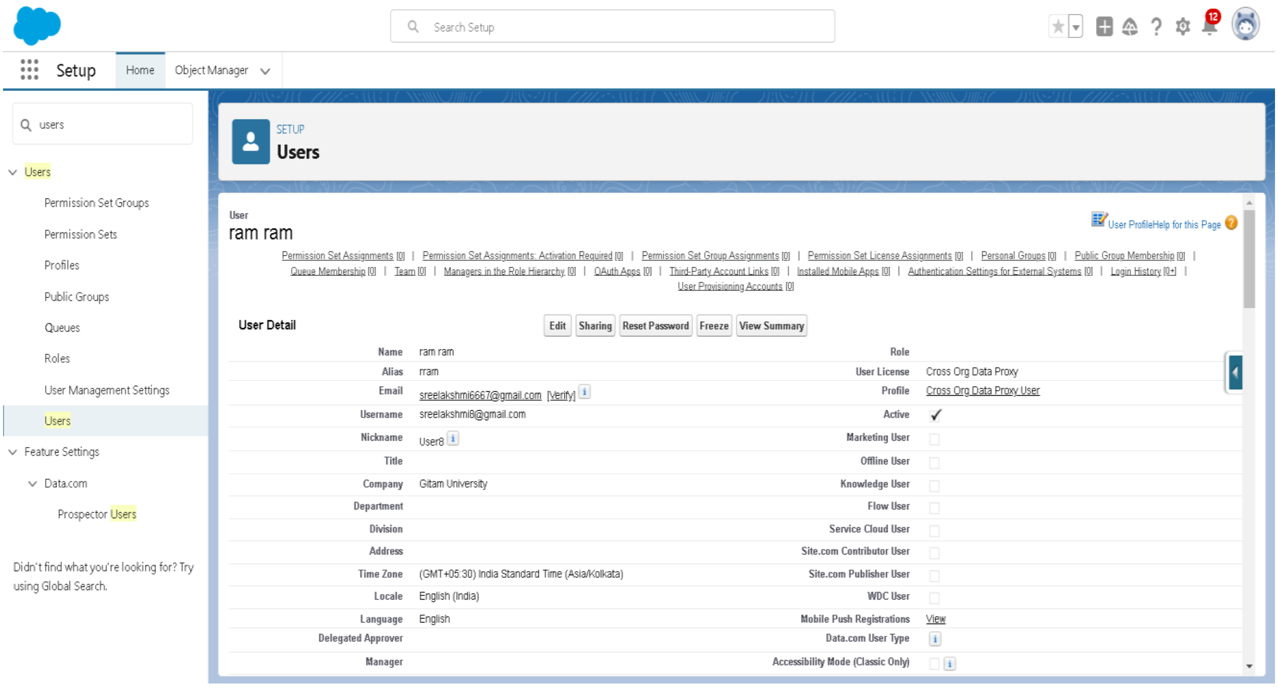
✓ Create Users

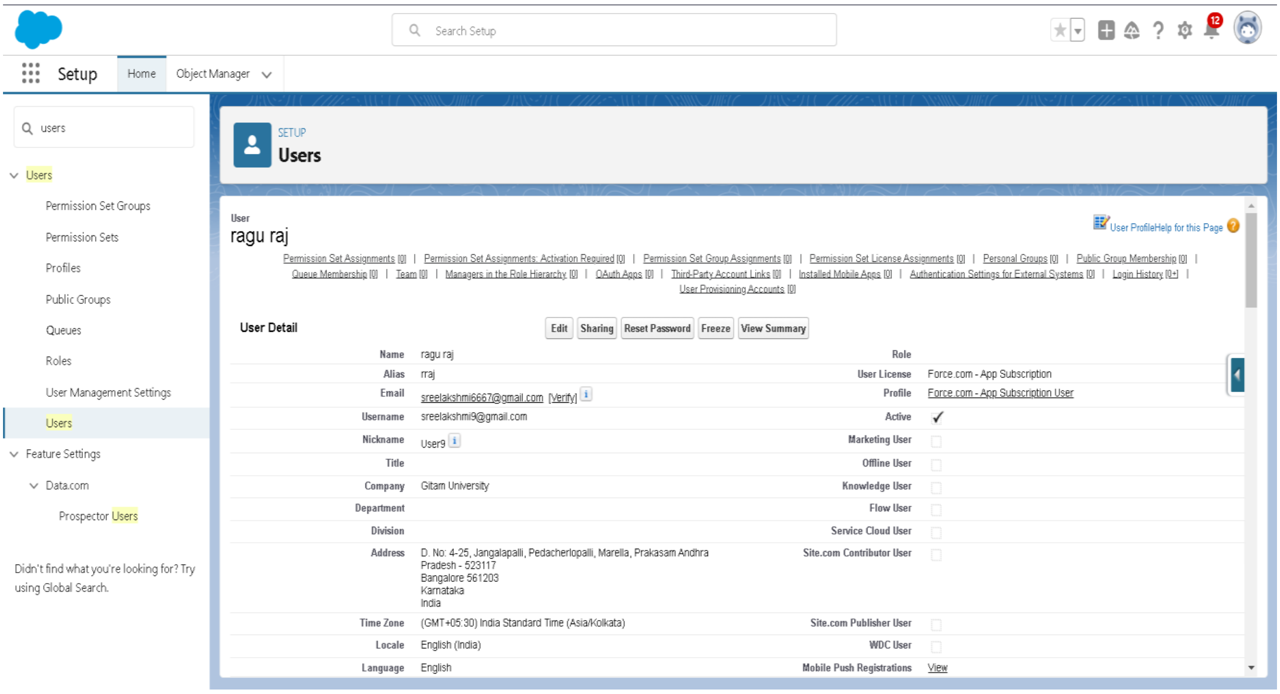
1. Go to setup >> type users in quick find box >> select users >> click new user.
2. Fill the fields: (First name, Last name, Email id, Username, Nick name, Role).
3. Click on save.





✓ Creating Another Users



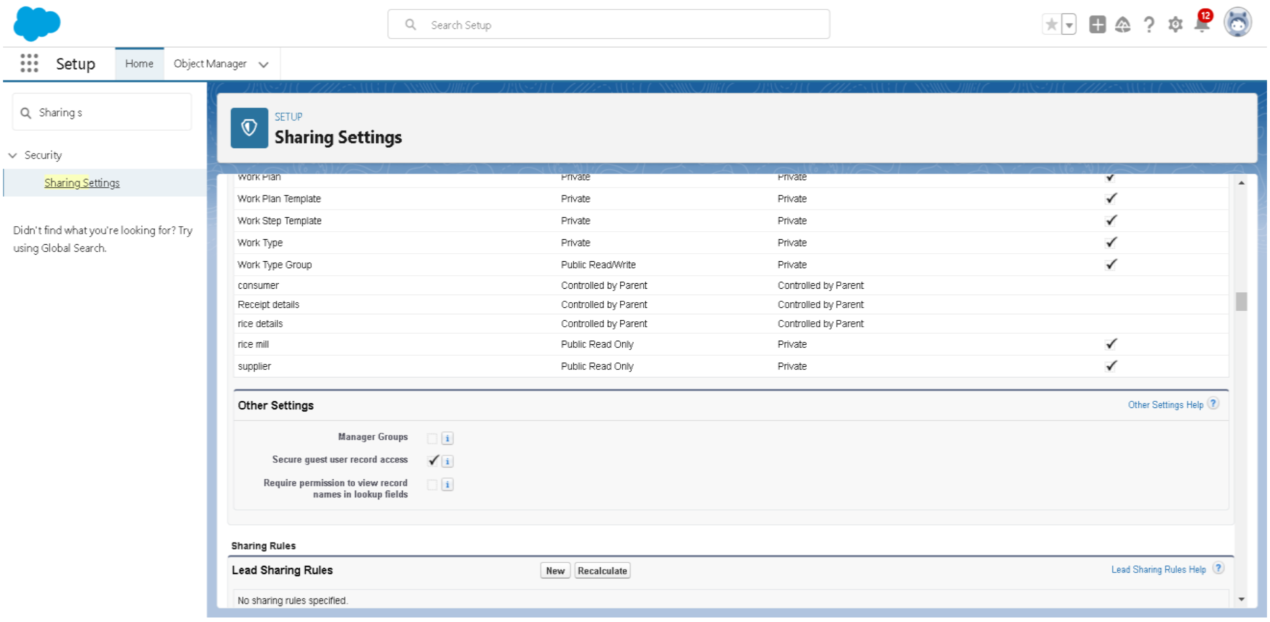


10. Permission Sets

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles and are the recommended way to manage your users' permissions.

✓ Creating OWD Settings

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

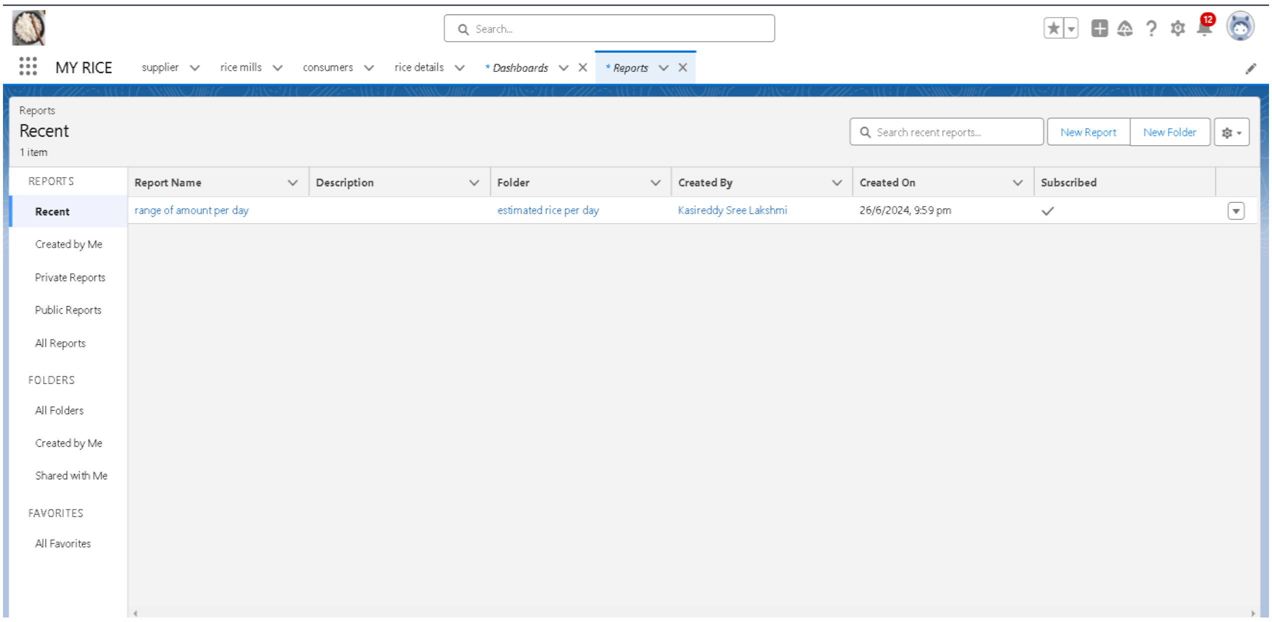


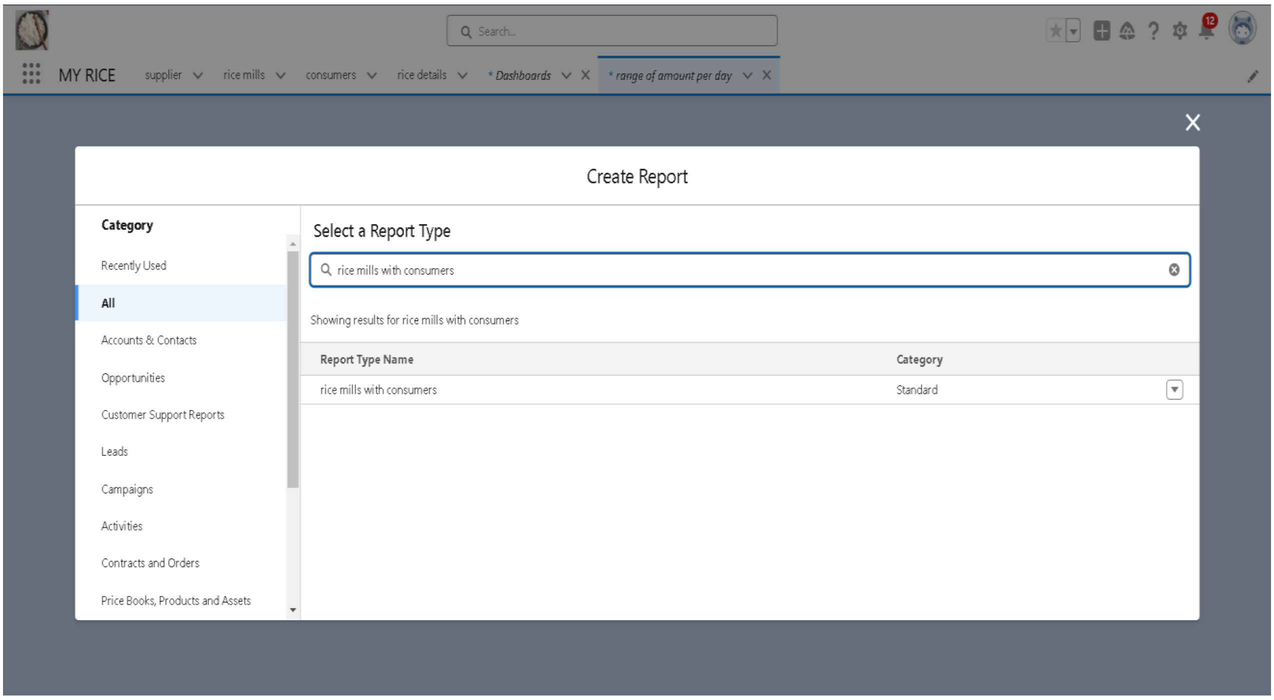
11. Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.
In Salesforce.com we can easily generate reports in different styles. And can create reports in a very short time and also schedule the reports. Salesforce provides a powerful suit of analytic tools to help you organize, view and analyse your data.

✓ Create Reports

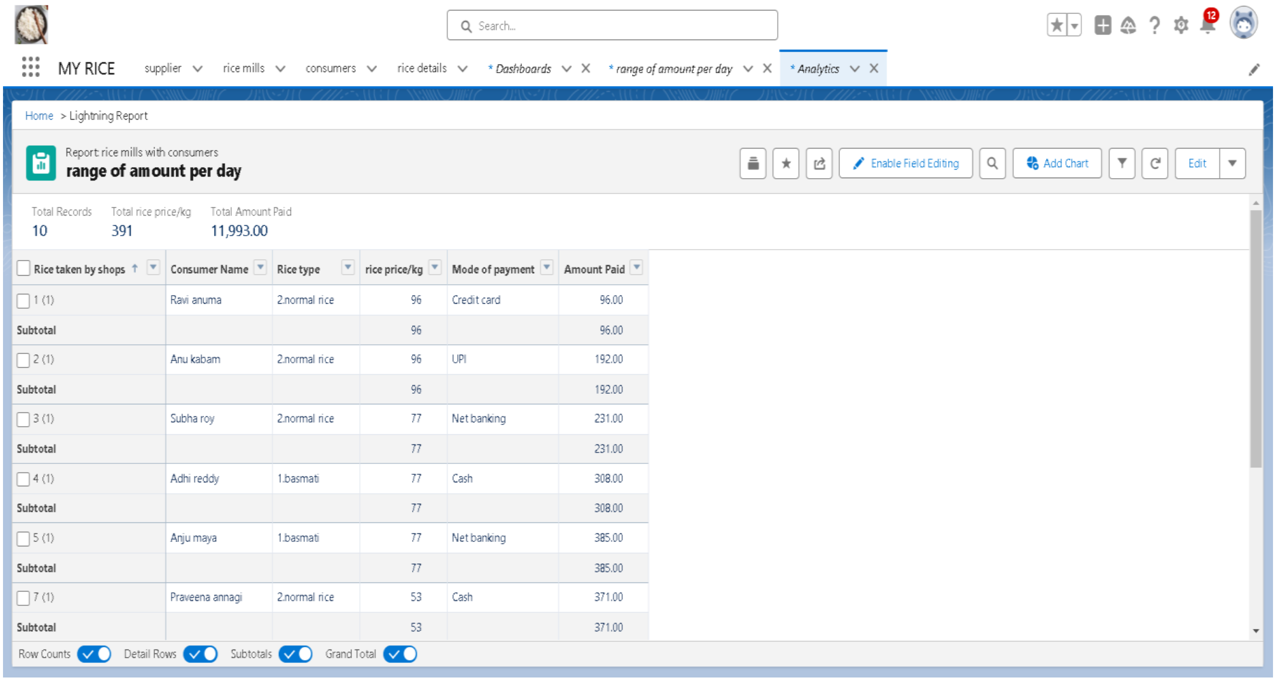
1. Go to the app >>click on the reports tab
2. Click New Report.
3. Their outline pane is opened already, select the fields that are mentioned below in the column section.
    - 1.consumer name
    - 2.rice type
    - 3.rice price/kg
    - 4.mode of payments
    - 5.amount paid
4. Remove the unnecessary fields.
5. Select the fields that are mentioned below in the GROUP ROWS section.
    - Rice taken by shops.
6. Click save and run and save the report as “range of amount per day”. And save it.

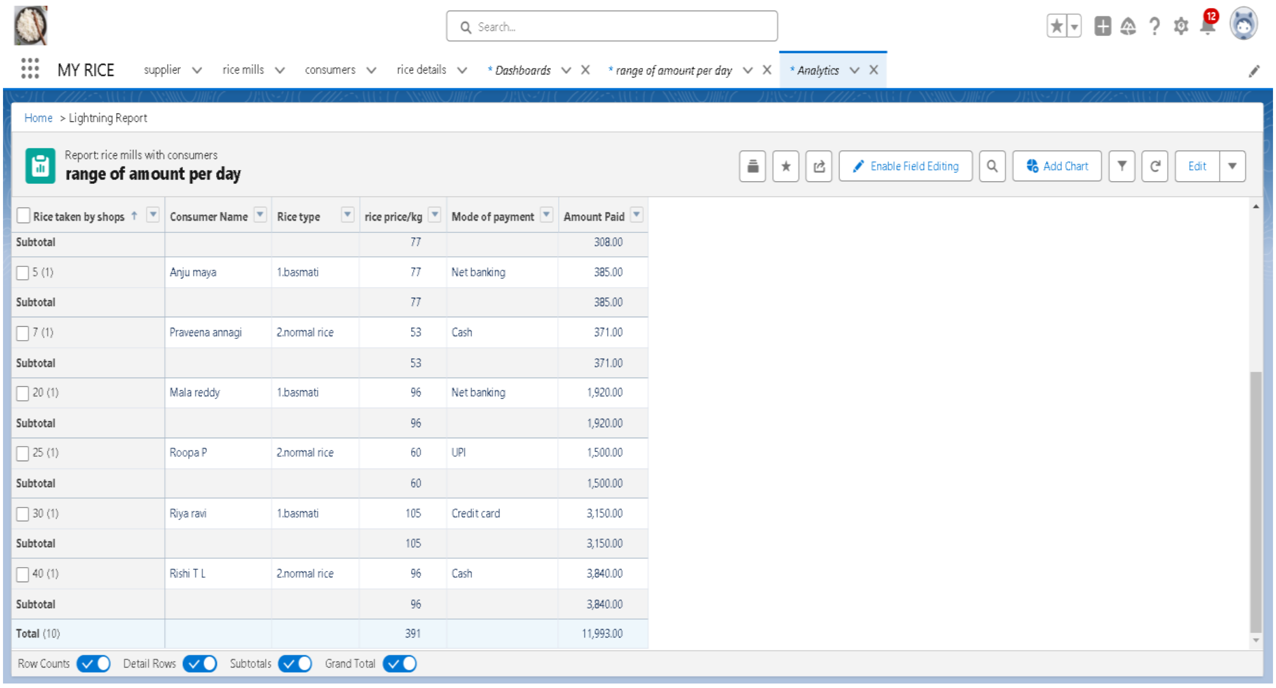




✓ Sharing Report to Owner

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

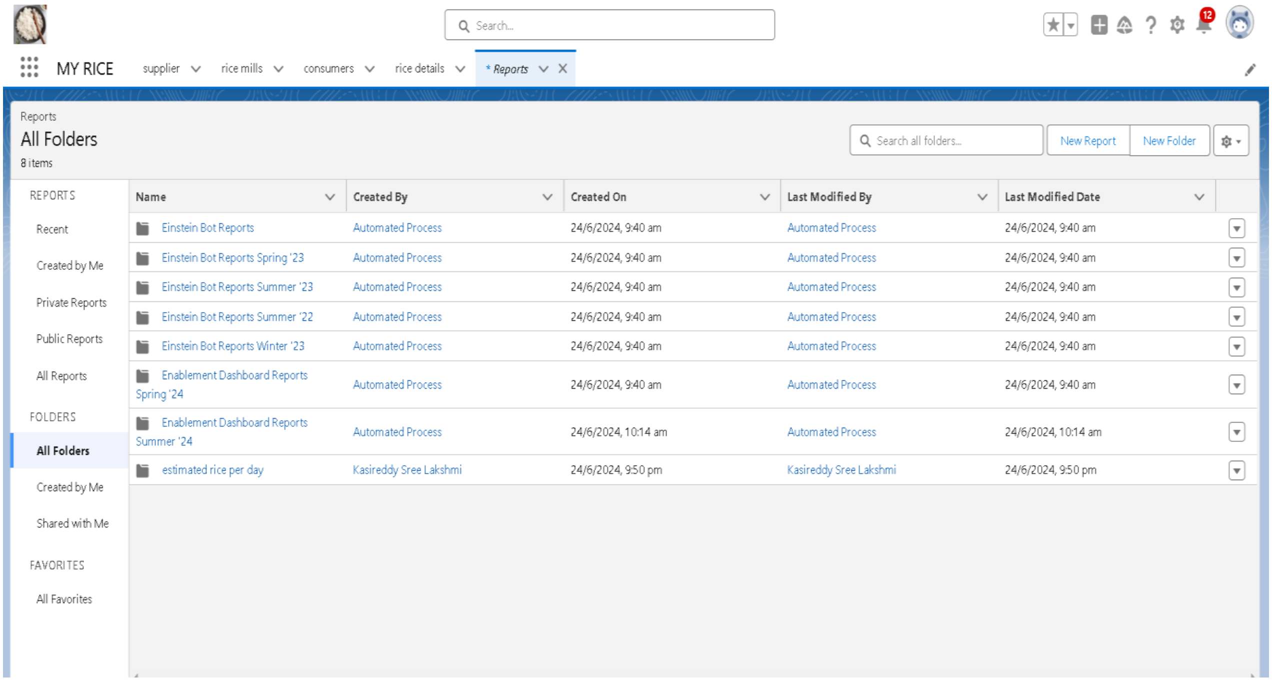




✓ Create A Report Folder

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. navigate to app launcher and click reports on that.

5. click all reports.
6. Select the range of amount per day drop down in that click move.
7. Select estimated rice per day folder and select folder.

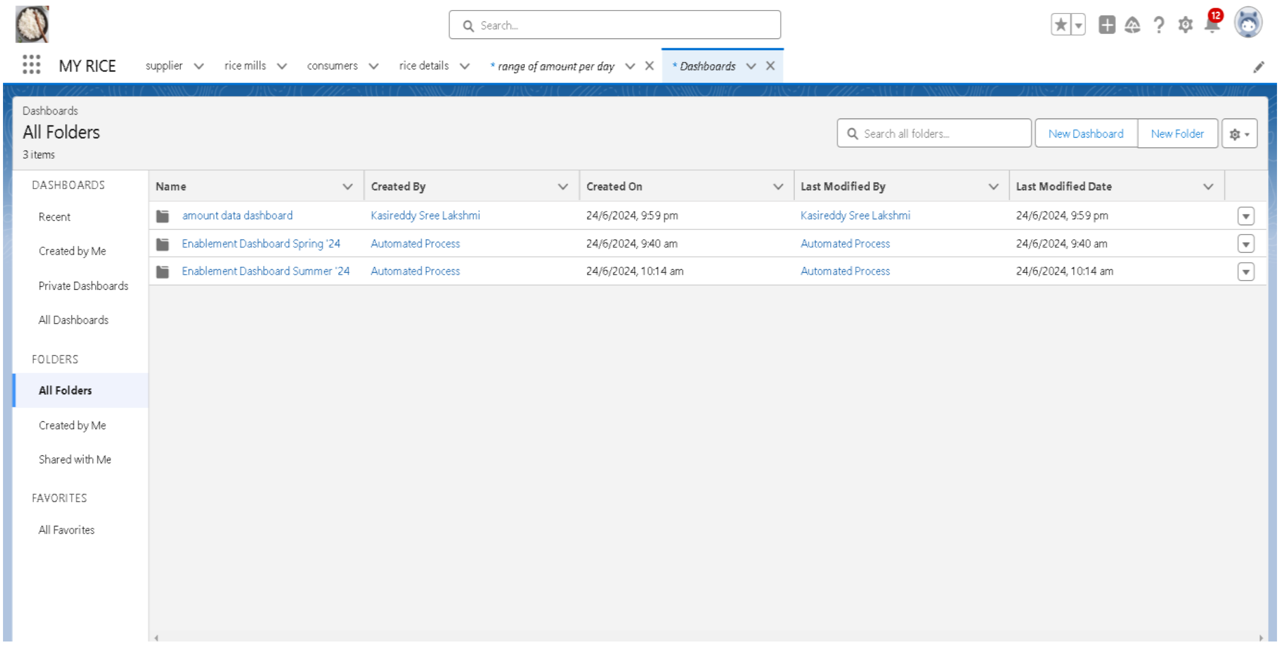


12. Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

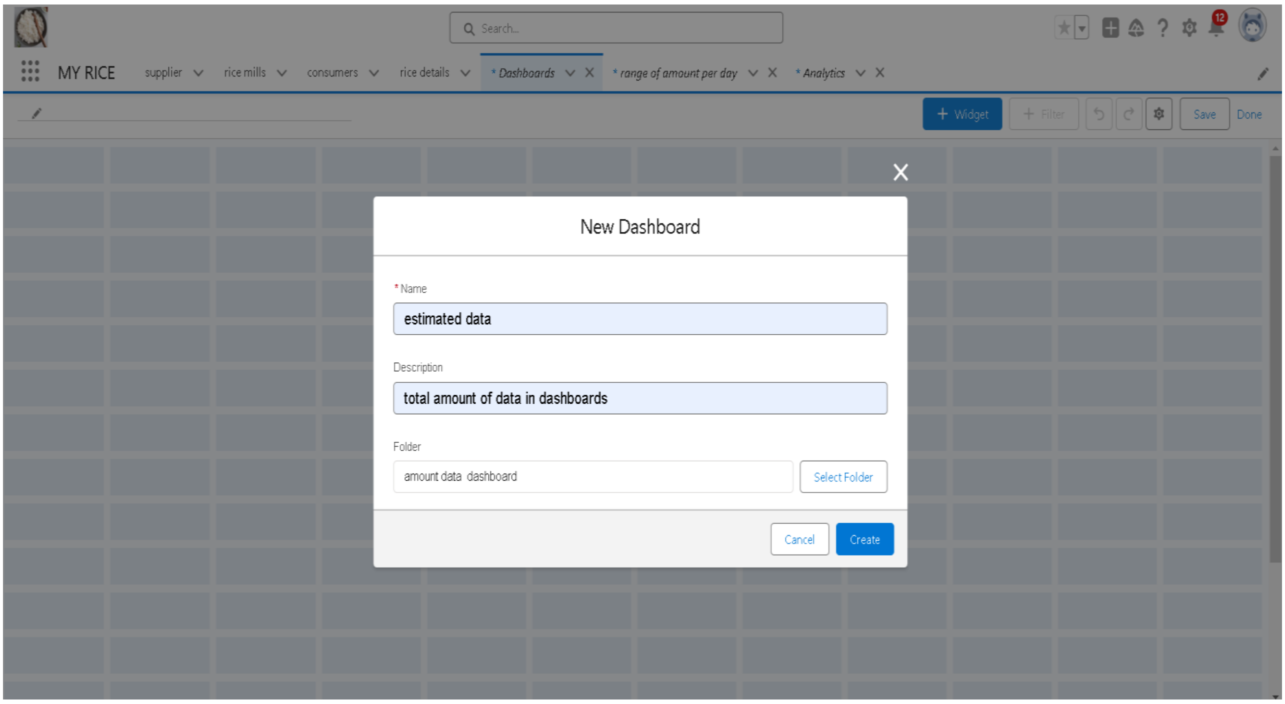
✓ Create A Dashboard Folder

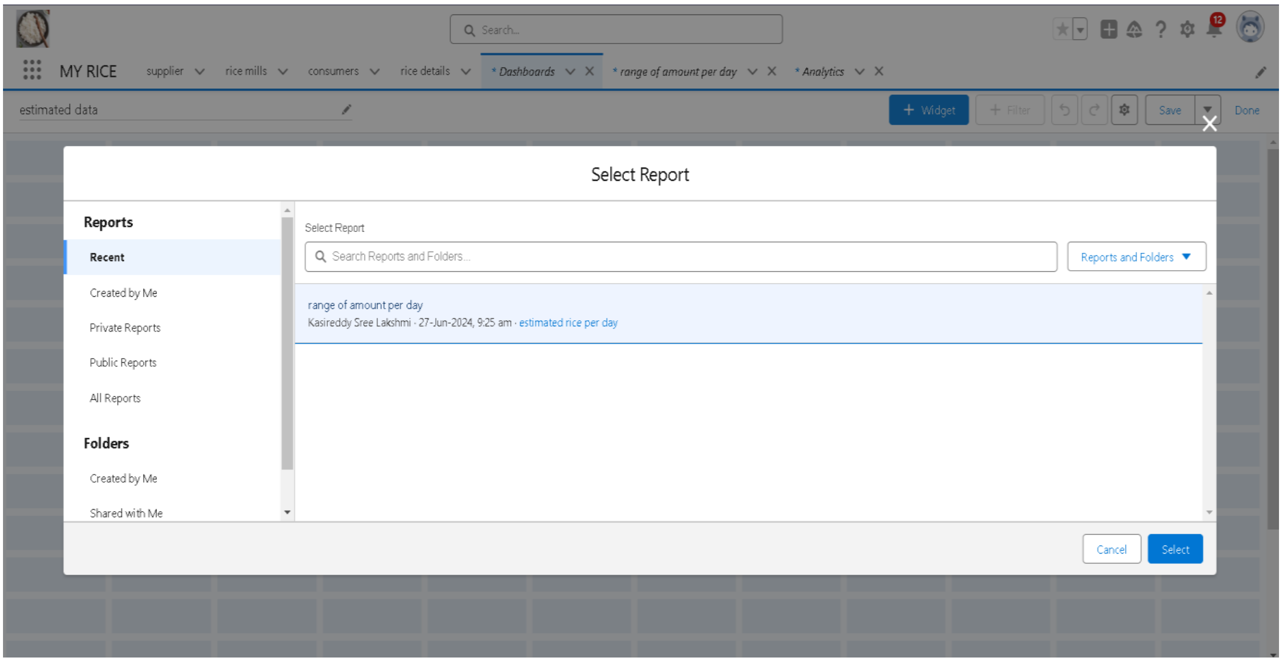
1. Click on the app launcher and search for the dashboard.
2. Click on the dashboard tab.
3. Click the new folder, give the folder label as "amount data dashboard".
4. Folder unique names will be auto populated.
5. Click save.

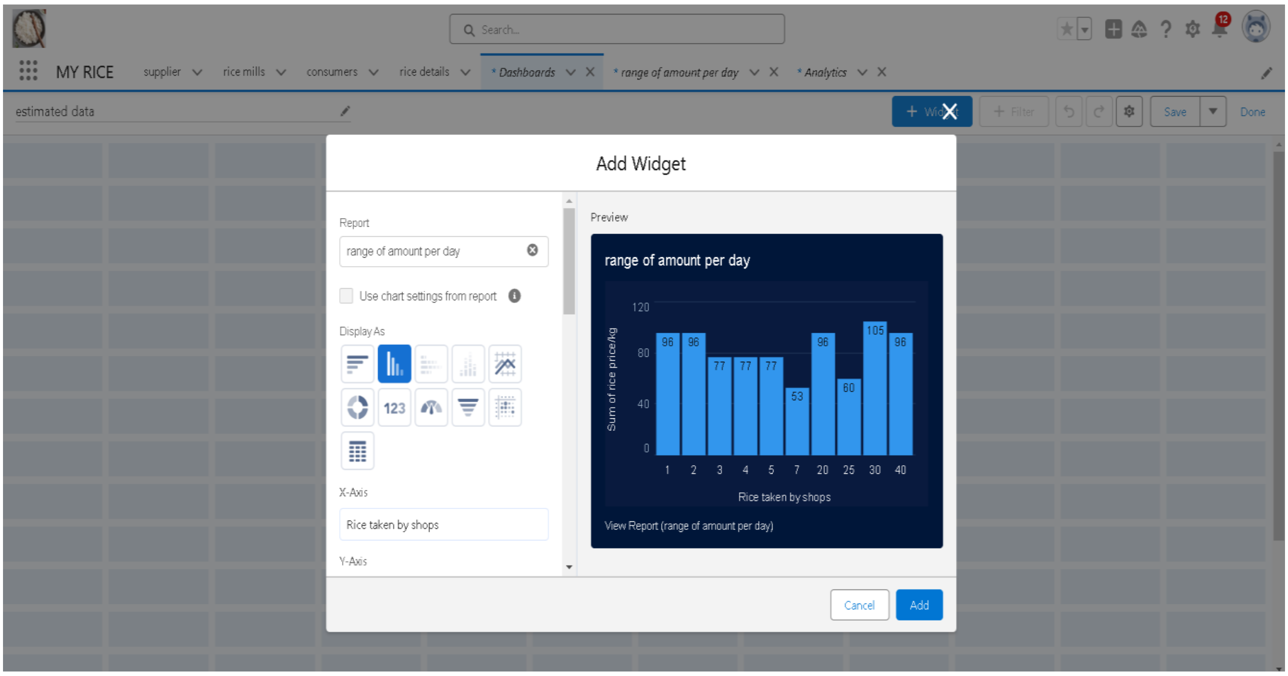


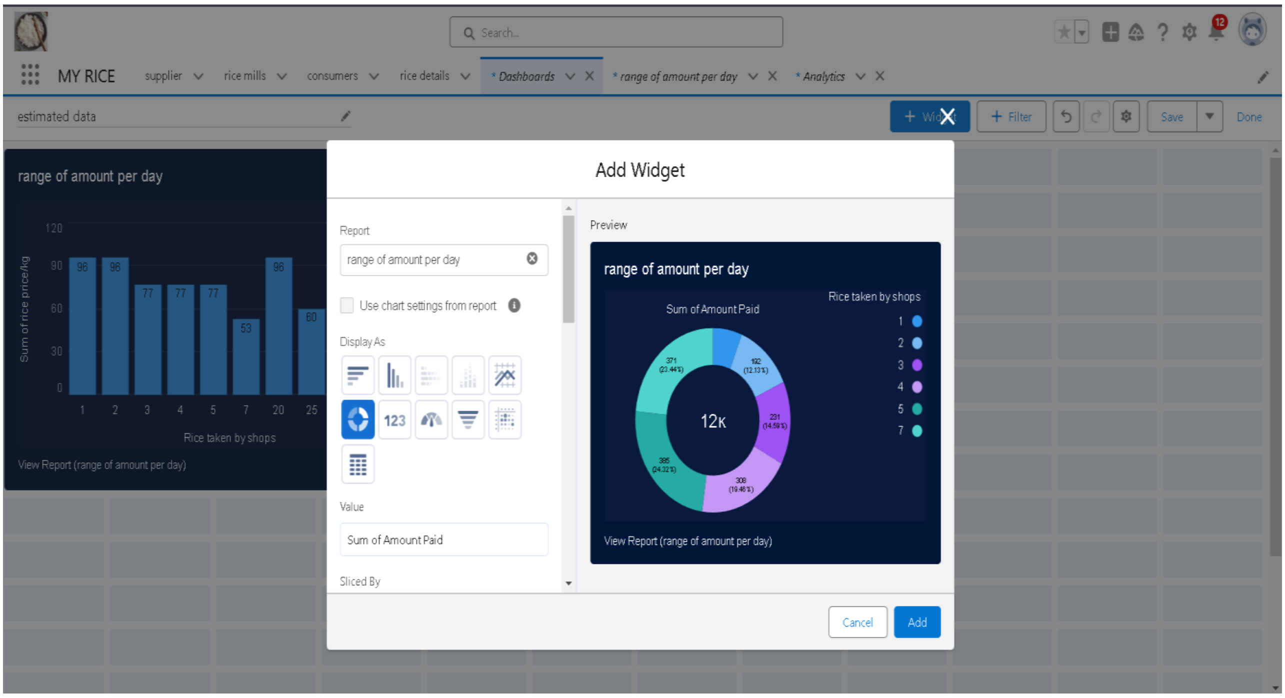
✓ Create Dashboard

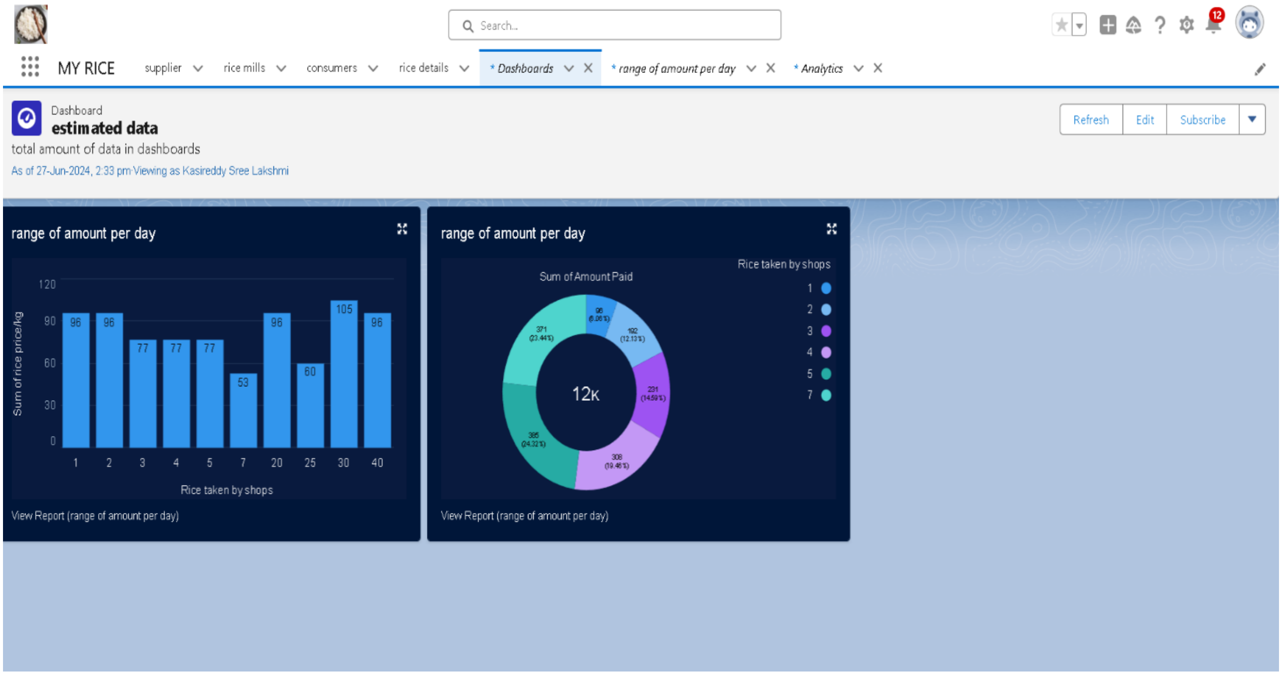
1. Go to the app >> click on the Dashboards tabs.
2. Give a Name and select the folder that was created, and click on create.
3. Select add widget.
4. Select a Report and click on select.
5. Preview is shown below.
    - Display as>> vertical bar chart
    - X-axis >> rice taken by shops
    - Y-axis >> sum of amount
    - Y-axis range >> automatic
    - Sort by >> rice taken by shops
    - Component theme >> dark.
6. Add widget.
    - display as donut chart
    - sort by >> sum of amount
    - title>>range of amount per day
    - component theme dark
7. Click add.
8. Click save and done.


MY RICE
supplier
rice mills
consumers
rice details
* Dashboards
* range of amount per day
* Analytics
Widget
Filter
Save
Done
New Dashboard
* Name
estimated data
Description
total amount of data in dashboards
Folder
amount data dashboard
Select Folder
Cancel
Create


MY RICE
supplier
rice mills
consumers
rice details
* Dashboards
* range of amount per day
* Analytics
estimated data
Widget
Filter
Save
Done
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
Kasireddy Sree Lakshmi · 27-Jun-2024, 9:25 am · estimated rice per day
Cancel
Select


MY RICE
supplier
rice mills
consumers
rice details
* Dashboards
* range of amount per day
* Analytics
estimated data
Add Widget
Report
range of amount per day
Use chart settings from report
Display As
X-Axis
Rice taken by shops
Y-Axis
Preview
range of amount per day
Sum of rice price/kg
Rice taken by shops
View Report (range of amount per day)
Cancel
Add


MY RICE
supplier
rice mills
consumers
rice details
* Dashboards
* range of amount per day
* Analytics
estimated data
range of amount per day
Add Widget
Report
range of amount per day
Use chart settings from report
Display As
Value
Sum of Amount Paid
Sliced By
Preview
range of amount per day
Sum of Amount Paid
Rice taken by shops
12K
View Report (range of amount per day)
Cancel
Add


MY RICE
supplier
rice mills
consumers
rice details
* Dashboards
* range of amount per day
* Analytics
Dashboard
estimated data
total amount of data in dashboards
As of 27-Jun-2024, 2:33 pm·Viewing as Kasireddy Sree Lakshmi
Refresh
Edit
Subscribe
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
Sum of Amount Paid
12K
Rice taken by shops
View Report (range of amount per day)