A CRM APPLICATION FOR WHOLESALE RICE MILL

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. 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.

Reporting and Dashboards: The application can generate detailed reports and analytics regarding daily how much rice is sold and total income per day, revenue generated, popular amenities, and most bought 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 a 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.The isblank formula is used to verify whether it is blank it shows an error.

Permission sets: Organization-wide defaults (OWD) in salesforce is the baseline level of access that the most restricted user should have. Organizational-wide 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.

Creating Developer Account

Creating a developer org in Salesforce.

1. Go to https://developer.salesforce.com/signup

2. On the sign-up form, enter the following details :

- First name & Last name

- Email

- Role: Developer

- Company: College Name

- County: India

- Postal Code: pin code

- Username: should be a combination of your name and company

Object

What Is an Object?

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

Create Supplier Object

To create an object:

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.

similarly create Rice mill object, consumer object and rice details object respectively

Tabs

What is Tab : 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

To create a Tab:(supplier)

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.

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 .

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 Item:

5. Select the items (supplier, rice mill, consumer , Rice details) from the search bar and move it using the arrow button >> Next.

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 ".

5. Field Name will be auto populated, and click on Next- Next >> Save.

Creating junction object as rice details with supplier & rice mill

To create junction object

Go to the setup page >> click on object manager >> From drop down click edit for rice details   object

1. Click on fields & relationship - click on New.

2. Select "Master-Detail relationship" as data type and click Next.

3. Select the related object " supplier " and click next.

4. Give Field Label as "supplier Name" and click Next.

5. Next >> Next >> Save & New.

6. Follow the same steps from 1 to 3.

7. Select the related object " rice mill " and click Next

8. Give Field Label as "rice mill 1(one)" and click Next.

9. Next >> Next >> Save.

similarly create fields for remaining objects according to the instructions.

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

7. First name , last name , consumer name , phone number, email, rice mill name.

   Follow the same process for another two sections as shown above , they are

8. One section is " rice details " , drag the fields that are

9. Rice taken by shop, rice type.

10. Another section is "Receipt details ", and drag the fields that are

11. Mode of payment , Amount paid.

12. Then , Click save.

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.

similarly create profiles for employee and worker respectively.

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.

Create User

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.

similarly create other two users for employee and worker respectively.

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.

Create Report

Go to the app >>click on the reports tab

1. Click New Report.

2. select for report type, search for "rice mill with consumers" click on it. And click on start 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

Remove the unnecessary fields.

Sharing report to the owner

1. Click the edit drop-down and select the subscribe option

2. After selecting the run report as "another person" select your personal account or whom you want to send that mail to.
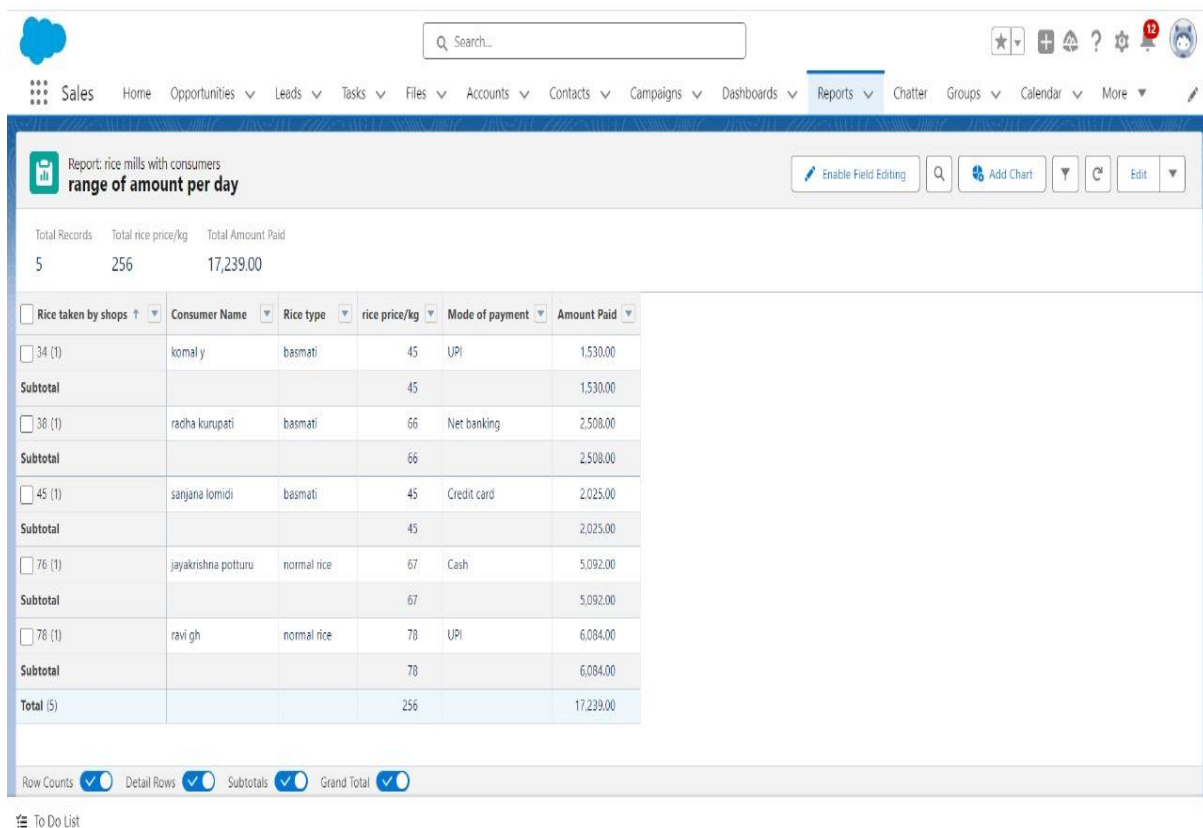
3. Click save.

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, and click on the new folder.

4. Give the Folder label "estimated rice per day " The folder's unique name will be auto-populated.

5. Click save.

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 and label the folder "amount data dashboard".

4. Folder unique names will be auto-populated.

5. Click save.

Result:

Rice taken by shops ↑ ▼	Consumer Name ▼	Rice type ▼	rice price/kg ▼	Mode of payment ▼	Amount Paid ▼
34 (1)	komal y	basmati	45	UPI	1,530.00
Subtotal			45		1,530.00
38 (1)	radha kurupati	basmati	66	Net banking	2,508.00
Subtotal			66		2,508.00
45 (1)	sanjana lomidi	basmati	45	Credit card	2,025.00
Subtotal			45		2,025.00
76 (1)	jayakrishna potturu	normal rice	67	Cash	5,092.00
Subtotal			67		5,092.00
78 (1)	ravi gh	normal rice	78	UPI	6,084.00
Subtotal			78		6,084.00
Total (5)			256		17,239.00

Q Search...

Reports
Created by Me
1 item

Q Search reports created by me...   New Report   New Folder   ⚙ ▾

REPORTS	Report Name ∨	Description ∨	Folder ∨	Created By ∨	Created On ∨	Subscribed	
Recent	range of amount per day		estimated rice per day	Kundana Potturu	6/10/2024, 4:20 pm	✓	▼

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Q Search...

estimated data   ✎   + Widget   + Filter   ↺ ↻ ⚙   Save ▼   Done

range of amount per day
Sum of Amount Paid — bar chart with Rice taken by shops (34, 38, 45, 76, 78) values 1.5k, 2.5k, 2k, 5.1k, 6.1k
View Report (range of amount per day)

range of amount per day
Sum of Amount Paid — donut chart total 17k, Rice taken by shops legend: 34, 38, 45, 76, 78
View Report (range of amount per day)

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

ConsumerRecord.apxc * ×

Code Coverage: None ▾ API Version: 61 ▼   Go To

```
1 ▾ class ConsumerRecord {
2 ▾     public static void sendEmailNotification (List<consumer__c> con){
3           for(consumer__c c:con)
4 ▾         {
5               Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
6                   email.setToAddresses( new List<String>{c.email__c});
7                   email.setSubject('Welcome to our company');
8                   email.setPlainTextBody('Dear ' + ' ' + ',\n\nWelcome to MY RICE!'+'You have been seen as a valuable customer to us. PLease conti
9                                   "We are proud to associate with valuable customers like you and we look forward to collaborating with
10                                  +'So why taking a step back, take a leap of faith and shop with us more, while we provide with the va
11                                  'Thankyou for buying '+ '' +'Here are some of the products that are brought by the customers who simi
12              Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
13
14          }
15      }
16 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time ▾	Status	Read	Size	