

Project Report: CRM Application for Wholesale Rice Mill [MY RICE]

Category: Salesforce

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1. Project Overview

The Rice Mill CRM Application is a user-friendly system designed for rice mill owners. It helps manage daily rice sales, monitor production, track inventory levels, and improve customer management. The CRM system automates many of the mill's daily processes, saving time and reducing manual errors. The application generates reports based on daily operations, which can be shared with the owner for better decision-making.

The overall goal of this project is to provide a centralized platform that integrates all the essential functions required to run a successful rice mill business. By using Salesforce's powerful tools, this CRM application helps businesses improve efficiency, reduce costs, and enhance customer satisfaction.

2. Key Features and Functionalities

a. Objects

Objects in Salesforce are tables that store data. They are divided into two types:

Standard Objects: Pre-built objects like Accounts, Contacts, Leads, and Opportunities. These handle common CRM needs, like customer details and sales tracking.

Custom Objects: User-created objects for specific business requirements, like Rice Details or Daily Sales in a rice mill CRM. Custom objects allow for flexibility in managing unique data.

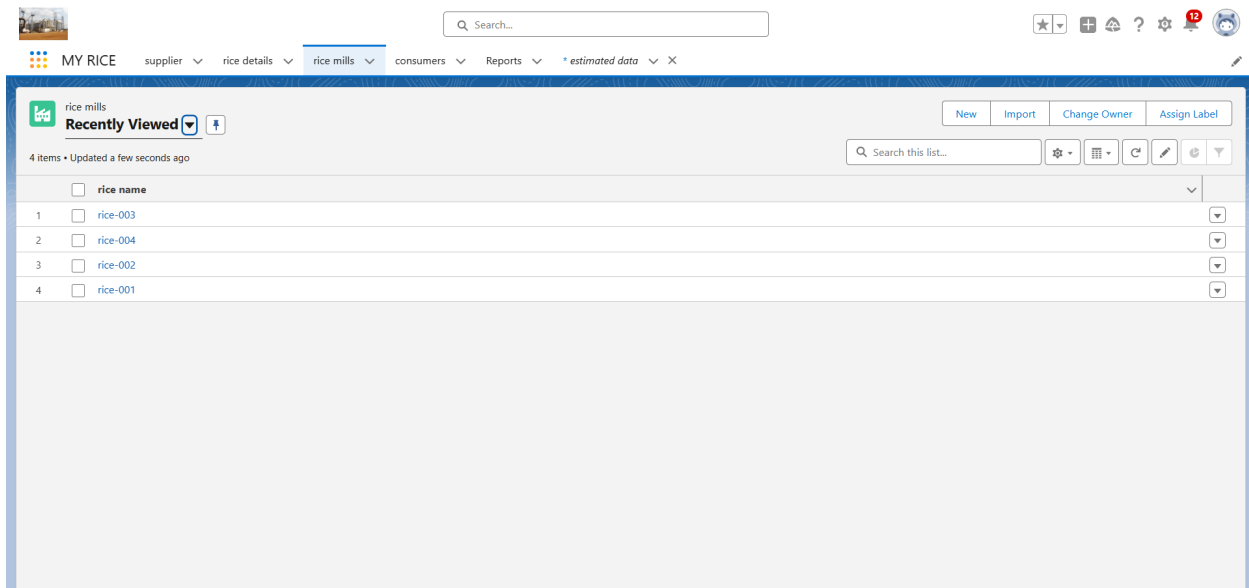
b. Tabs

Tabs are the user interface elements that give users access to objects and other features.

Standard Tabs: These include pre-built tabs for objects like Accounts, Contacts, and Reports.

Custom Tabs: Created to access custom objects (e.g., Rice Details tab in a custom CRM).

Tabs make it easy to navigate data and are customizable based on user needs.



d) Roll-up Summary Field

Definition: Roll-up summary fields are used to aggregate data from related child records into a parent record. In a rice mill scenario, this feature helps summarize key data points, such as the total quantity of rice supplied by each supplier.

Example: If the mill receives multiple shipments of rice from a supplier, the roll-up summary field will show the total quantity of rice supplied by that supplier over a specific period.

Benefits: By summarizing data at a higher level, this feature provides insights into supplier performance, helping the mill optimize its supply chain.

e) Cross-Object Formula Field

Definition: A cross-object formula field is used to perform calculations based on related records across different objects in Salesforce.

Example: In this project, a formula field calculates the total cost of a rice order by multiplying the quantity of rice by the price per kilogram. This field helps the owner see the exact amount payable for each order.

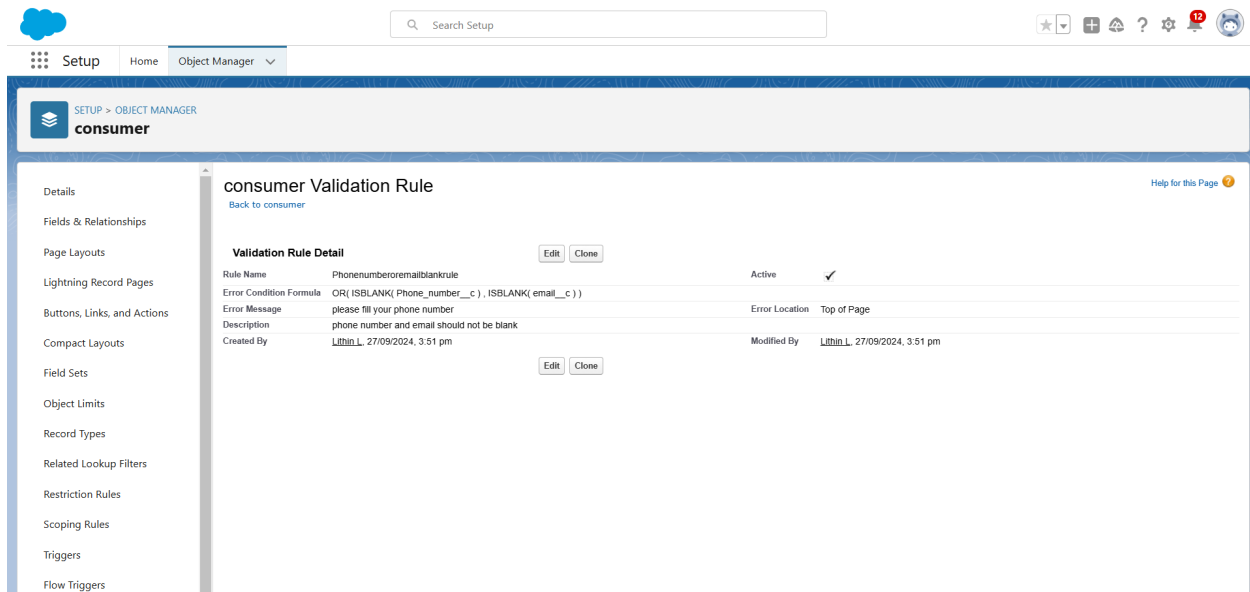
Benefits: Automating such calculations eliminates the need for manual data entry, reducing the risk of errors and saving time. It also ensures accuracy in financial reporting and improves transparency with customers.

g) Validation Rules

Purpose: Validation rules ensure that users input the correct data. These rules are important for maintaining data accuracy and consistency across the system.

Example: The ISBLANK formula is used to check if any required fields are left empty. If a user tries to save a record without filling in all the necessary fields, the system will display an error message, prompting the user to complete the missing information.

Benefits: Validation rules help prevent incomplete or incorrect data from being saved, ensuring that the system always contains accurate and reliable information.



f) Permission Sets and Security

Organization-Wide Defaults (OWD): These settings control the level of access that users have to the data within the system. In this project, the permissions are set so that each user role (owner, employer, worker) has access to only the data they need to perform their job.

Role-Based Access Control:

Owner Role: The owner has full access to all data in the system, including sales records, customer details, and employee information.

Employer Role: The employer can access worker records but cannot view sensitive data such as financial reports.

Worker Role: Workers have limited access to operational data and cannot view sensitive business information.

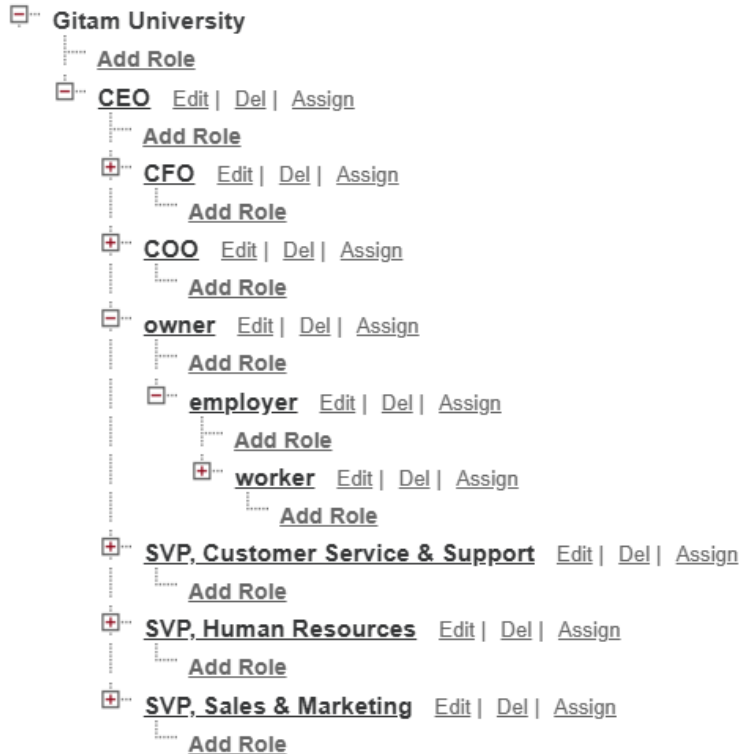
Benefits: This layered security system ensures that data is only accessible to authorized users, protecting the privacy of employees and customers while ensuring business security.

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

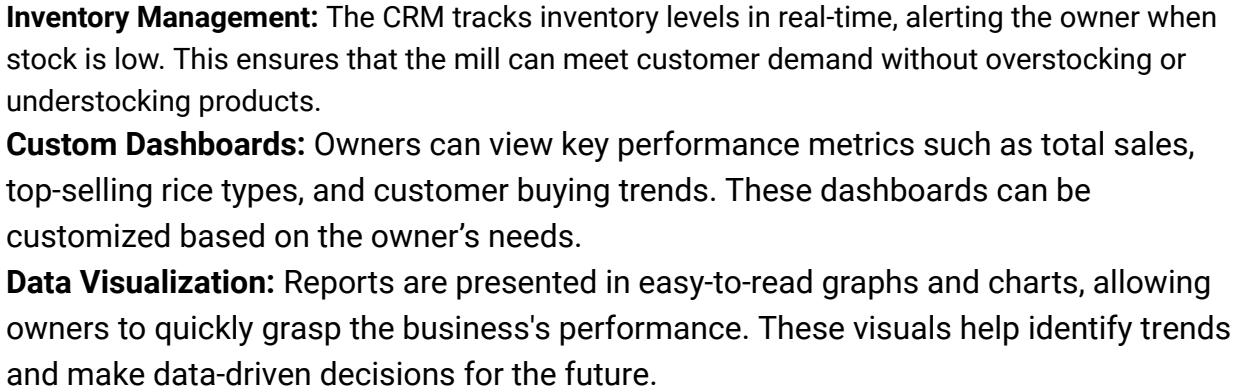
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g) Reporting and Dashboards

Daily Sales and Production Reports: The system tracks how much rice is produced daily, how much is sold, and what types of rice are most popular. The daily report also highlights income generated from each sale.

Revenue Tracking: The system provides a detailed breakdown of daily revenue, showing how much money is earned from each type of rice sold. This feature allows the owner to easily identify profitable products.



Data Migration: One of the biggest challenges was migrating existing records from manual systems to Salesforce. This required careful mapping of fields and ensuring that no data was lost during the transition.

User Training: Training employees to use the new CRM system was another challenge, as some workers were not familiar with digital tools. Detailed training sessions were conducted to ensure all users could effectively use the system.

Customization: Customizing Salesforce to meet the specific needs of a rice mill required careful planning. The team had to design custom objects, fields, and reports that were tailored to the business model of a rice mill.

4. Benefits of the CRM Application

Efficiency: By automating daily operations, the application saves time and reduces manual work.

Better Decision-Making: Owners get real-time reports and dashboards, helping them make better business decisions based on accurate data.

Increased Accuracy: Validation rules and formula fields ensure that all data is accurate and up-to-date, minimizing errors.

Enhanced Security: Role-based access control protects sensitive data and ensures that only authorized users can view important information.

Scalability: The application can easily be scaled as the business grows, accommodating more data and users without compromising performance.

5. Conclusion

The Rice Mill CRM Application is a valuable tool for automating and optimizing the day-to-day operations of a rice mill. By integrating features such as reporting, inventory management, validation rules, and role-based access, the application provides a comprehensive solution for rice mill owners. It enhances operational efficiency, improves decision-making, and ensures data security, making it a crucial asset for business growth and success.