

# CRM Application for Wholesale Rice Mill

## **Project Overview :**

The Rice Mill CRM Application is a comprehensive solution designed to streamline and simplify operations in a wholesale rice mill. It focuses on tracking daily rice production, sales, and generating reports for owners. Leveraging the power of Customer Relationship Management (CRM), this application aims to enhance customer experiences, optimize operations, and improve efficiency. The solution is tailored to address the specific needs of a rice mill factory, making it user-friendly and feature-rich.

# **Features and Functionality :**

## **1.Reporting and Dashboards :-**

- **Daily Sales Reports:** Generate detailed reports on the daily quantity of rice sold, types of rice, total income, and revenue generated.
- **Analytics:** Provide insights into popular rice types and top customers to assist in resource allocation and planning.
- **Dashboards:** Display data in an easy-to-understand format for owners, offering a real-time view of operations.

## **2.Rollup Summary Fields :-**

- **Definition:** Summarize data from a child object to a parent object using a master-detail relationship.
- **Examples:**
  - Display the total value of rice supplied from the supplier details.
  - Aggregate total rice quantities for each transaction.

## **3.Cross-Object Formula Fields :-**

- **Definition:** Create formula fields that reference data from related objects in Salesforce.
- **Examples:**
  - Calculate the total amount to pay for a transaction: `Number of Rice Bags * Price per Kg.`
  - Automatically display computed values on relevant records.

## **4.Validation Rules :-**

- **Definition:** Ensure data accuracy by enforcing specific criteria before saving a record.
- **Example:**
  - Use the `ISBLANK` formula to prevent empty fields. If a required field is blank, an error message will be displayed.

## **5.Permission Sets :-**

- **Organization-Wide Defaults (OWD):** Establish baseline access restrictions.

- **Role-Based Access:**

- Owners: Access all records (employers and workers).
- Employers: Access worker records.
- Workers: Restricted access to personal data only.

## **Pre-requisites :**

### **System Requirements :-**

- **Salesforce Developer Account:** Required to develop and deploy the application.
- **Knowledge of Salesforce Admin Concepts:** Familiarity with objects, relationships, and CRM functionalities.
- **Web Browsers:** At least two browsers installed on the machine.
- **Internet Connectivity:** Stable connection for seamless operations.

## **What You Will Learn :**

### **1. Real-Time Salesforce Project Development :-**

- Hands-on experience building a CRM application.

### **2. Objects and Relationships in Salesforce :-**

- Understand standard and custom objects and their relationships.

### **3. Formula Fields and Validation Rules :-**

- Master formula fields, cross-object formulas, and validation rules to enhance data accuracy.

### **4. Page Layouts :-**

- Customize page layouts to present data effectively.

### **5. Rollup Summary Fields :-**

- Learn to aggregate and summarize data for insightful reports.

### **6. Reports and Dashboards :-**

- Design dashboards and generate actionable reports for stakeholders.

## **Implementation Plan :**

### **Step 1: Setting Up the Salesforce Environment :-**

- Create a Salesforce developer account.
- Define objects for rice production, sales, customers, and suppliers.

### **Step 2: Configuring Relationships :-**

- Establish master-detail and lookup relationships between objects.
- Implement rollup summary fields for aggregating rice quantities and sales data.

### **Step 3: Designing Formula Fields :-**

- Add cross-object formulas to compute total payment and other key metrics.

### **Step 4: Setting Up Validation Rules :-**

- Configure validation rules to enforce data integrity using the `ISBLANK` formula.

### **Step 5: Defining Permission Sets :-**

- Create roles and assign appropriate access levels for owners, employers, and workers.

### **Step 6: Building Reports and Dashboards :-**

- Design user-friendly dashboards to present key metrics.
- Develop reports for daily operations, sales, and revenue.

## **Key Deliverables :**

- Functional CRM application tailored for a rice mill.
- Detailed reports and dashboards for real-time decision-making.
- Secure and role-based access to data.
- Enhanced data accuracy through validation rules.

## **Conclusion :**

The Rice Mill CRM Application is a robust solution designed to optimize operations in a wholesale rice mill. By leveraging Salesforce's powerful features such as rollup summary fields, cross-object formulas, validation rules, and dashboards, the application ensures enhanced productivity and decision-making capabilities. This project serves as a real-world example of applying CRM to meet industry-specific needs, offering significant learning opportunities for developers and administrators alike.