A CRM APPLICATION FOR WHOLESALE RICE MILL

Category: Salesforce:

DESCRIPTION :

The Rice Mill Customer Relationship Management (CRM) application is an all-in-one system that condenses various reports on the amount of rice produced in a day, the total number of sales made, and their types for distribution to managers every day. It makes use of CRM for improved customer experiences and increased efficiency in mill production activities. The aim of this project is to build an easy-to-use application that meets the requirements inherent in milling industry.

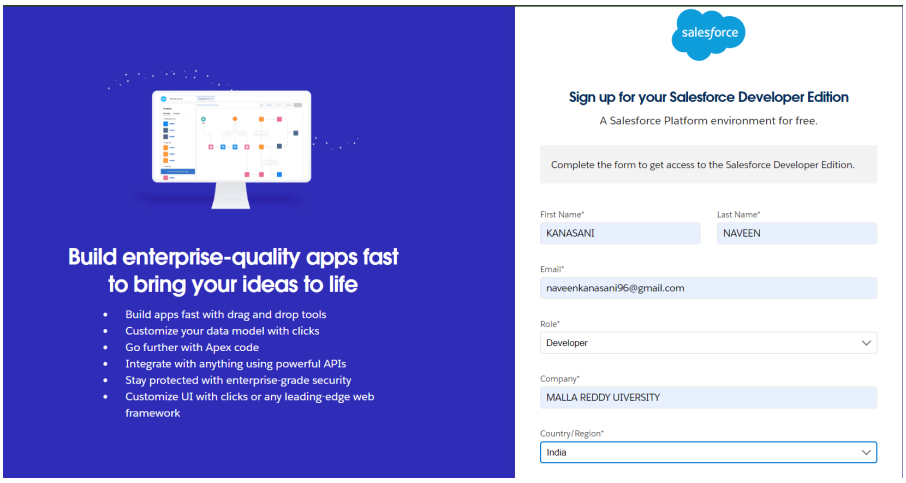
INTRODUCTION TO SALESFORCE

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.
Salesforce has got everything you need to run your business from anywhere. With its standard products and features, you can relate with prospects and clients as well as work with employees and partners in a joint manner. The company also offers a cloud data storage system that guarantees the security of your files.

Activity 1: Creating Developer Account:

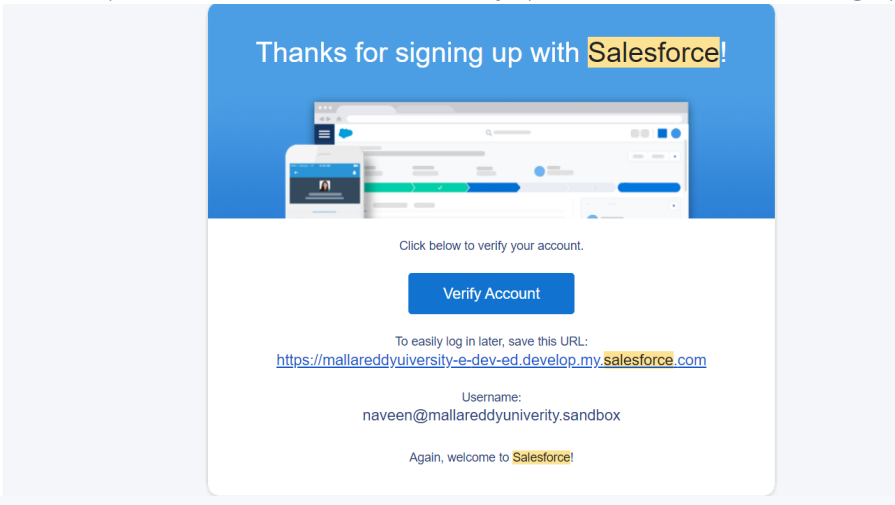
Creating a developer org in salesforce.

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



STEP:2

2. Click on Verify Account
3. Give a password and answer a security question and click on change password.



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

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.

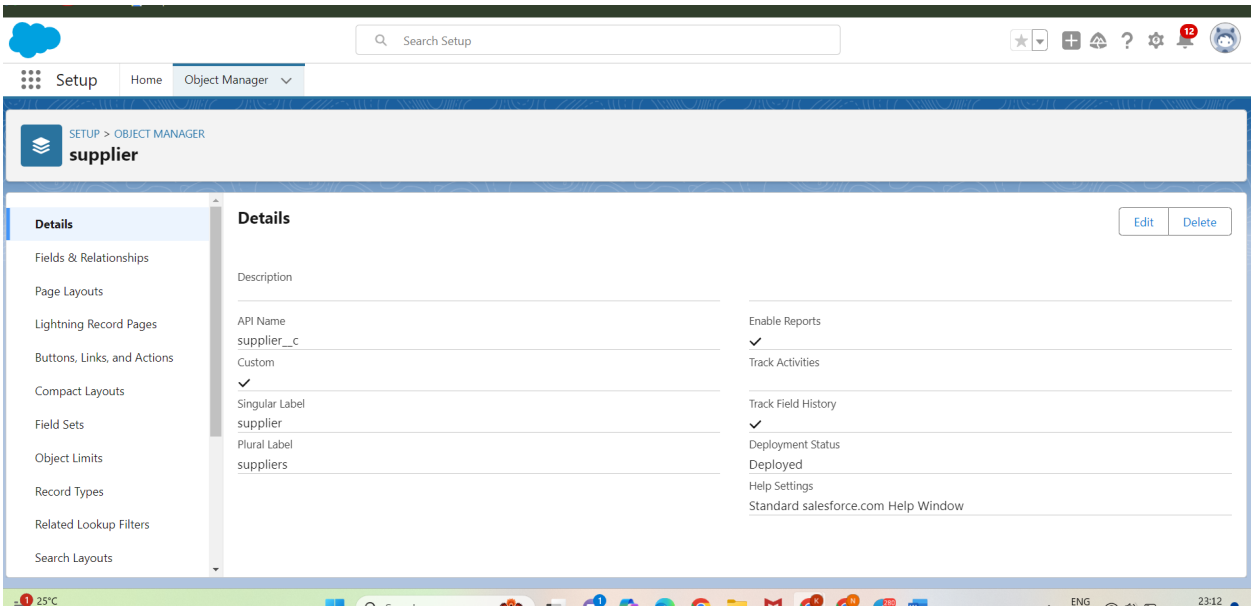
To Navigate to Setup page:

Click on gear icon → click setup.

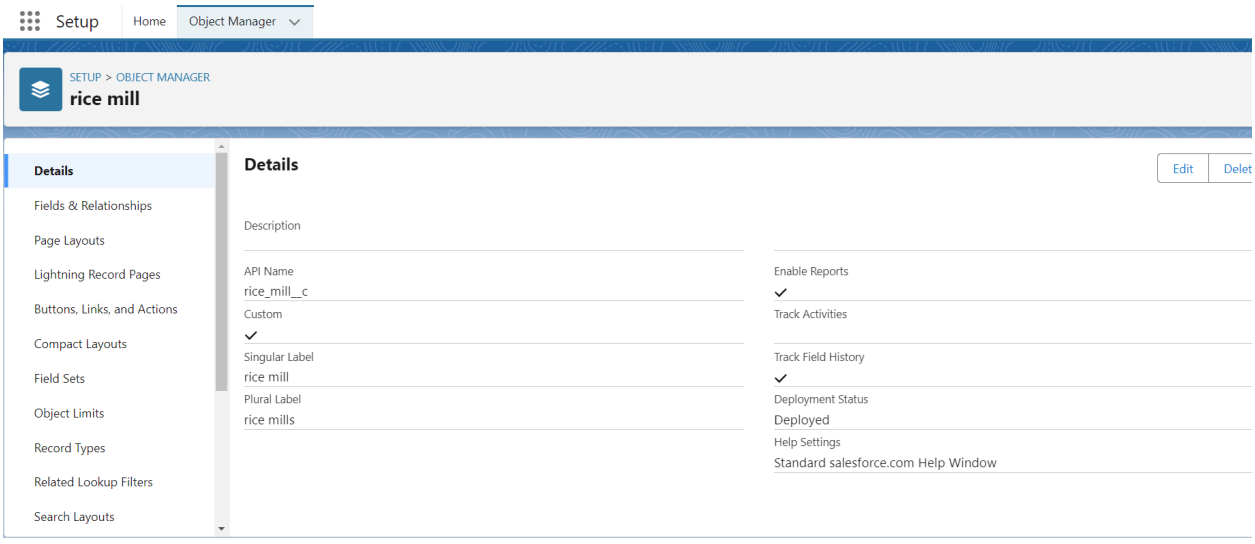
To create an object:

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 on Save.

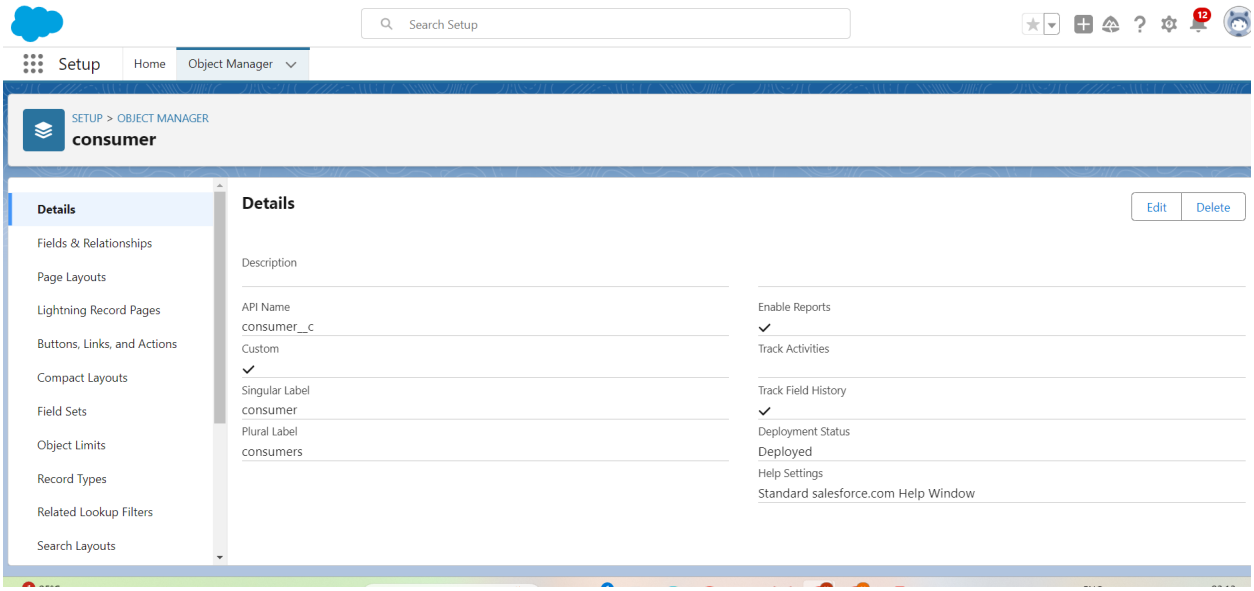
Activity 1: Create Supplier Object:



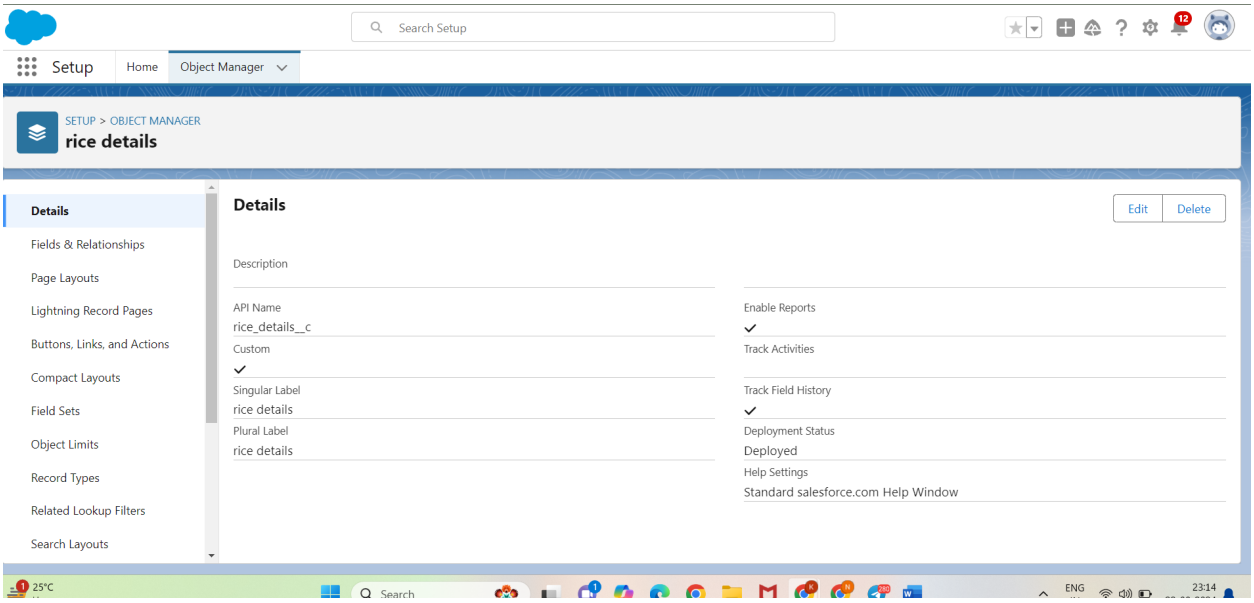
Activity 2: Create Rice mill Object:



Activity 3: Create consumer Objects:



Activity 4: Create rice details Objects:

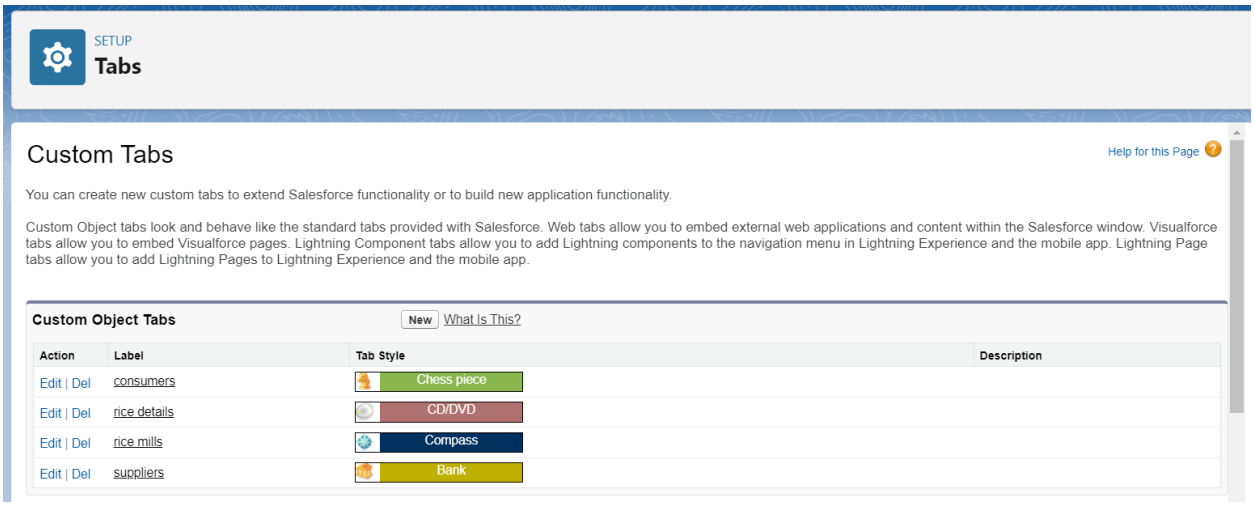


TABS

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

Activity 1: Creating a Custom Tab

Activity 2: Creating Remaining Tabs

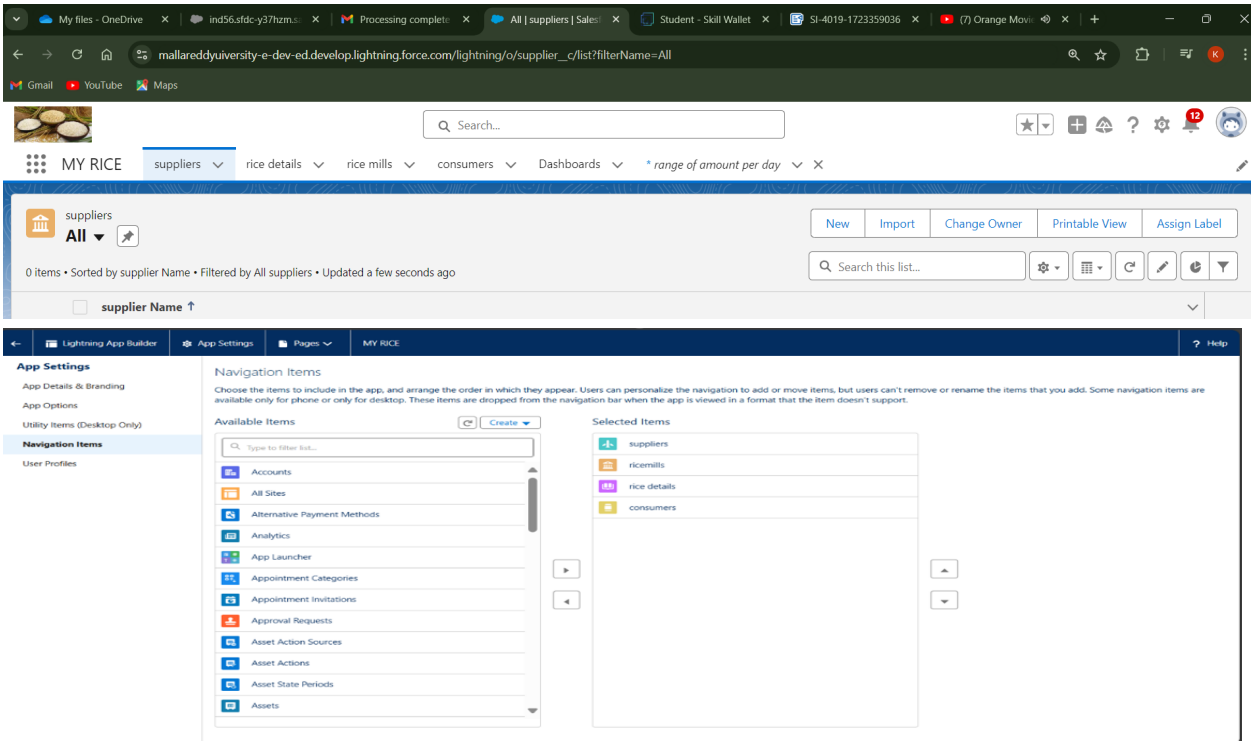


THE LIGHTNING APP

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 color 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.

Activity 1: Create a Lightning App

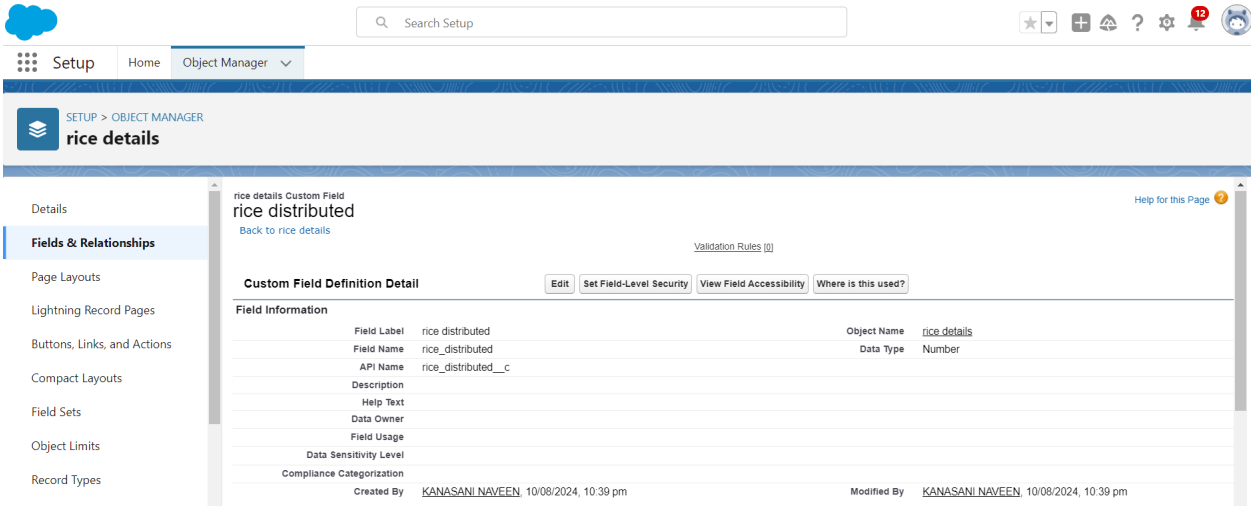


FIELDS

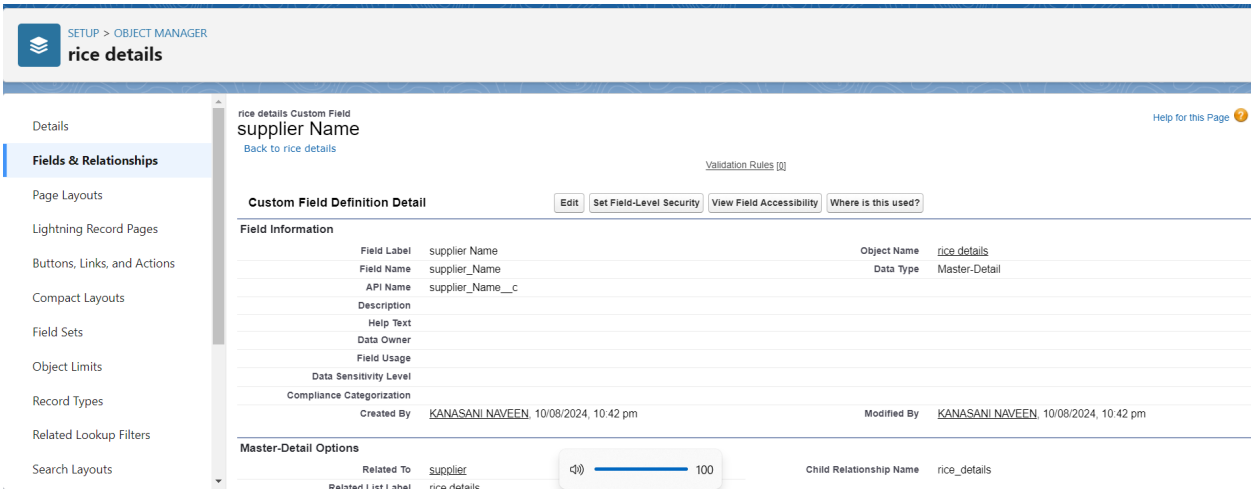
When we talk about Salesforce, Fields represent the data stored in the columns of a relational

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.

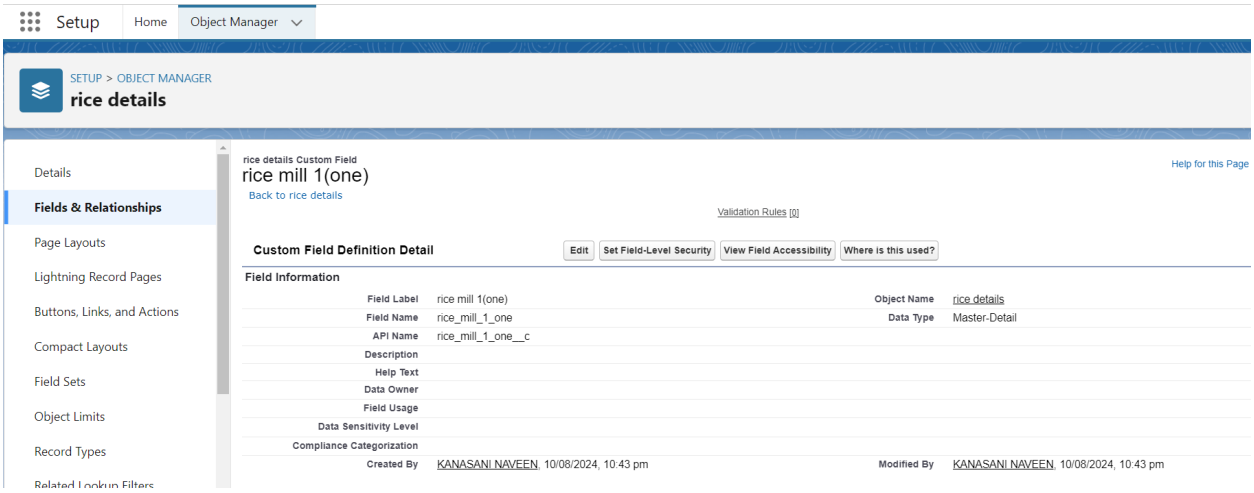
Activity 1: Creating the number field in rice details object



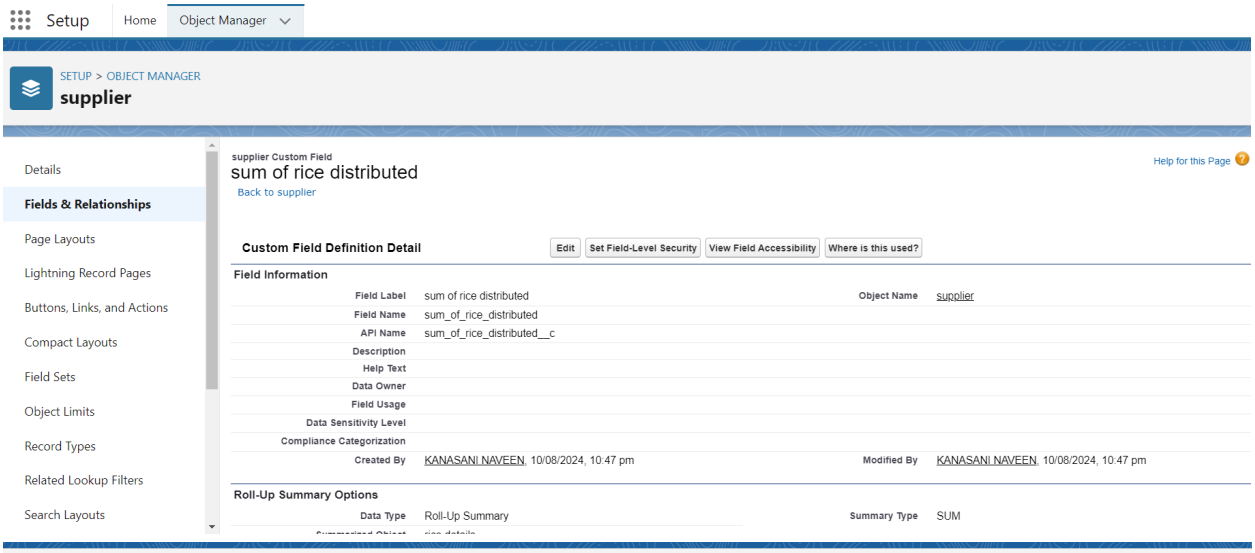
Activity 2 : Creating Junction Object :

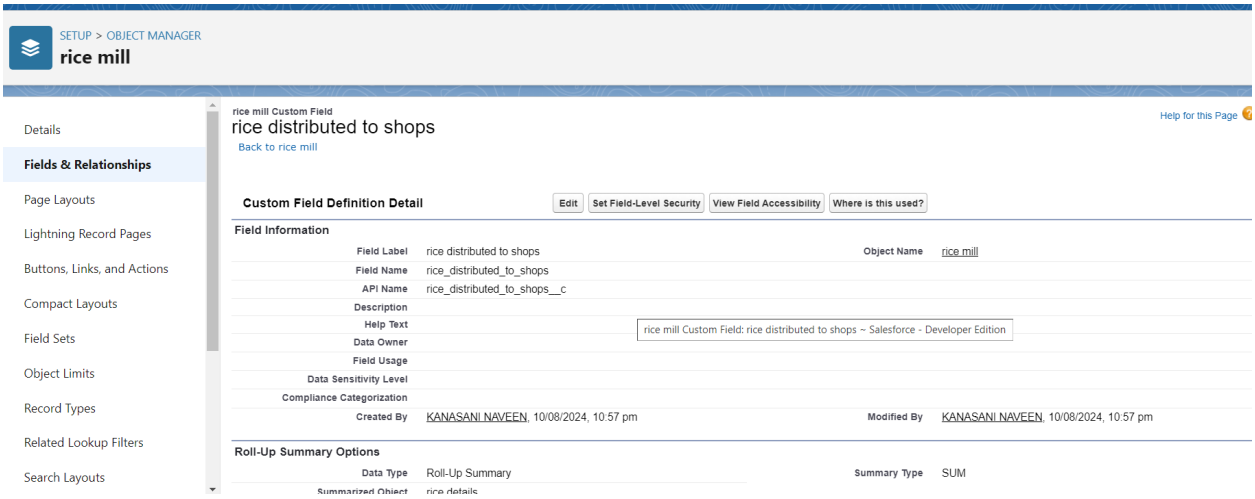


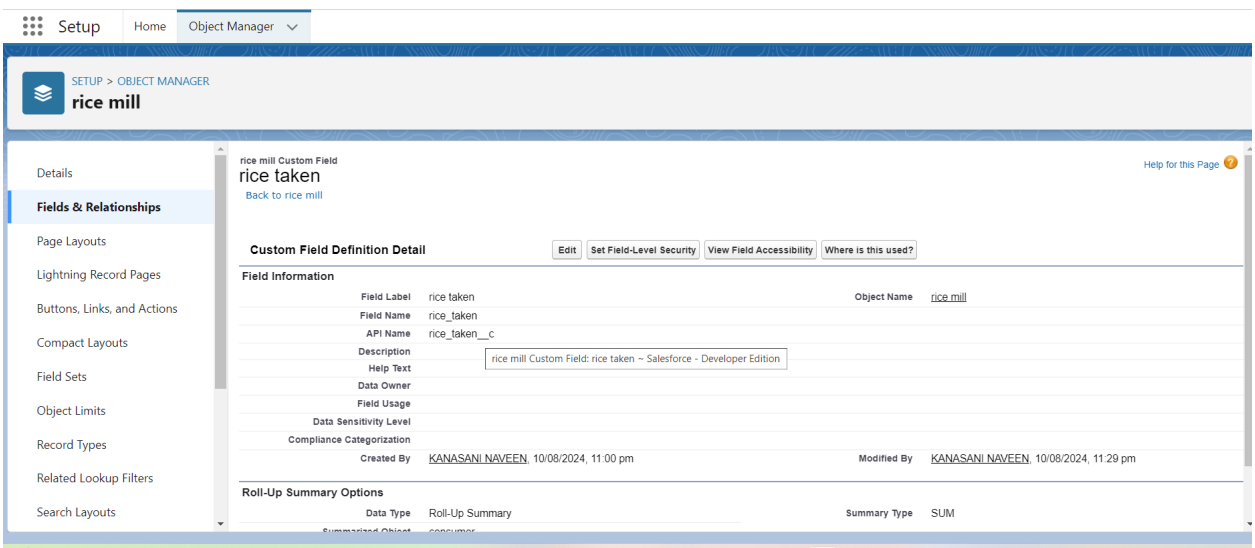
Activity 3 : Creating a Master-Detail Relationship



Activity 4 : Creating the Roll-up Summary

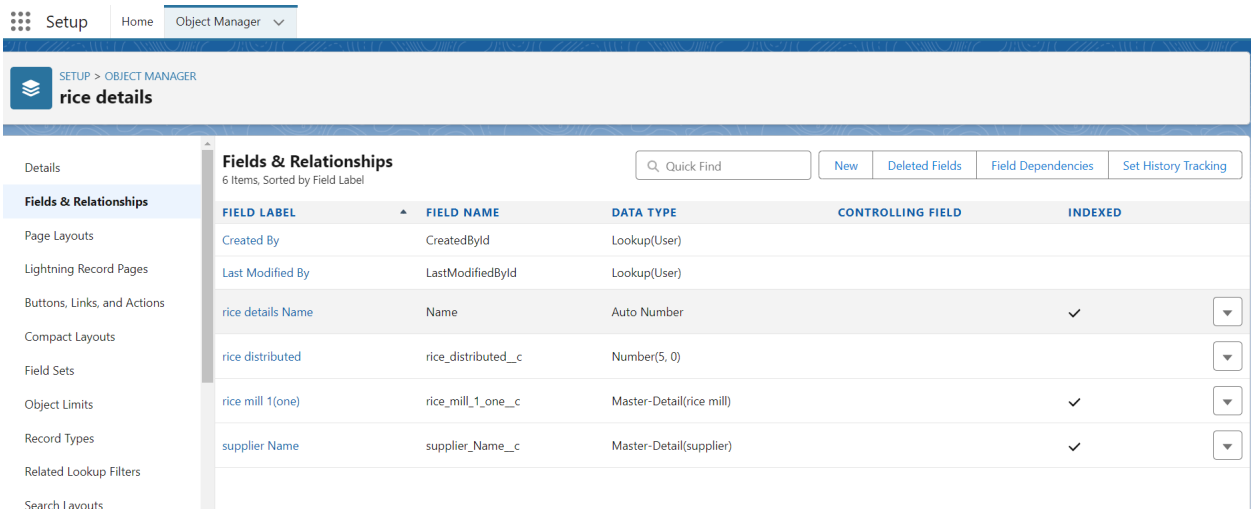




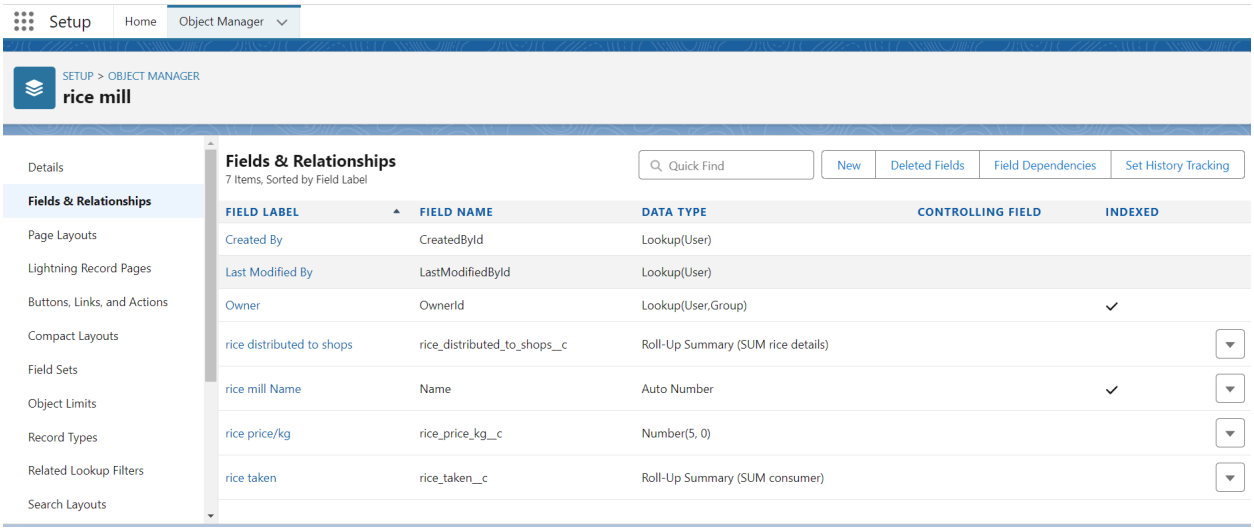


Activity 5 : Creating Fields in Objects

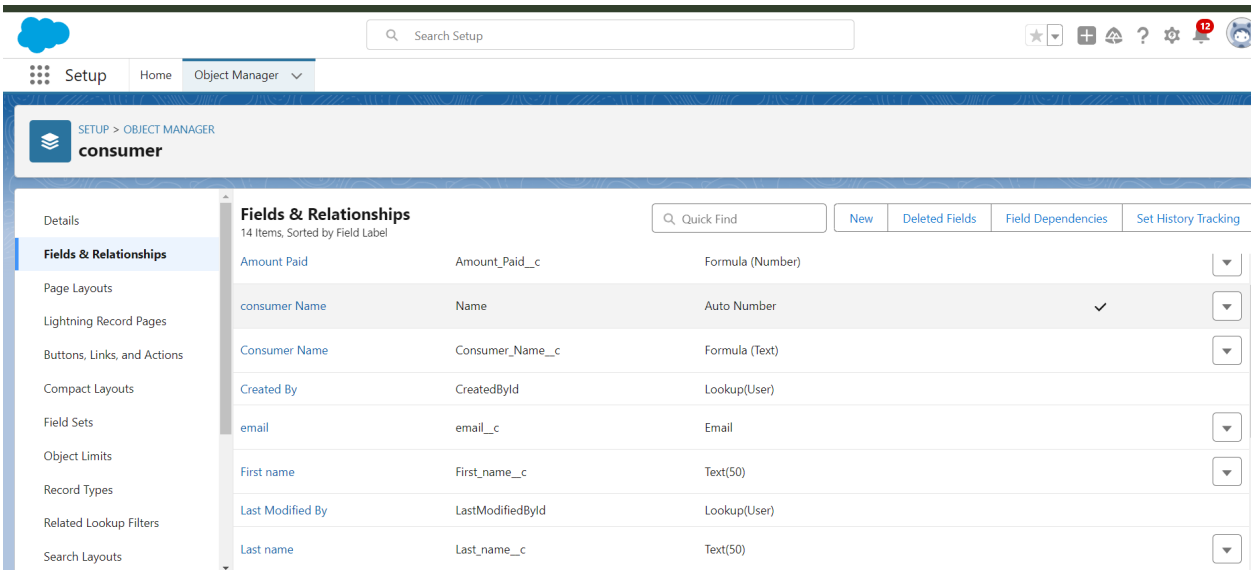
Creating the number field in rice details object



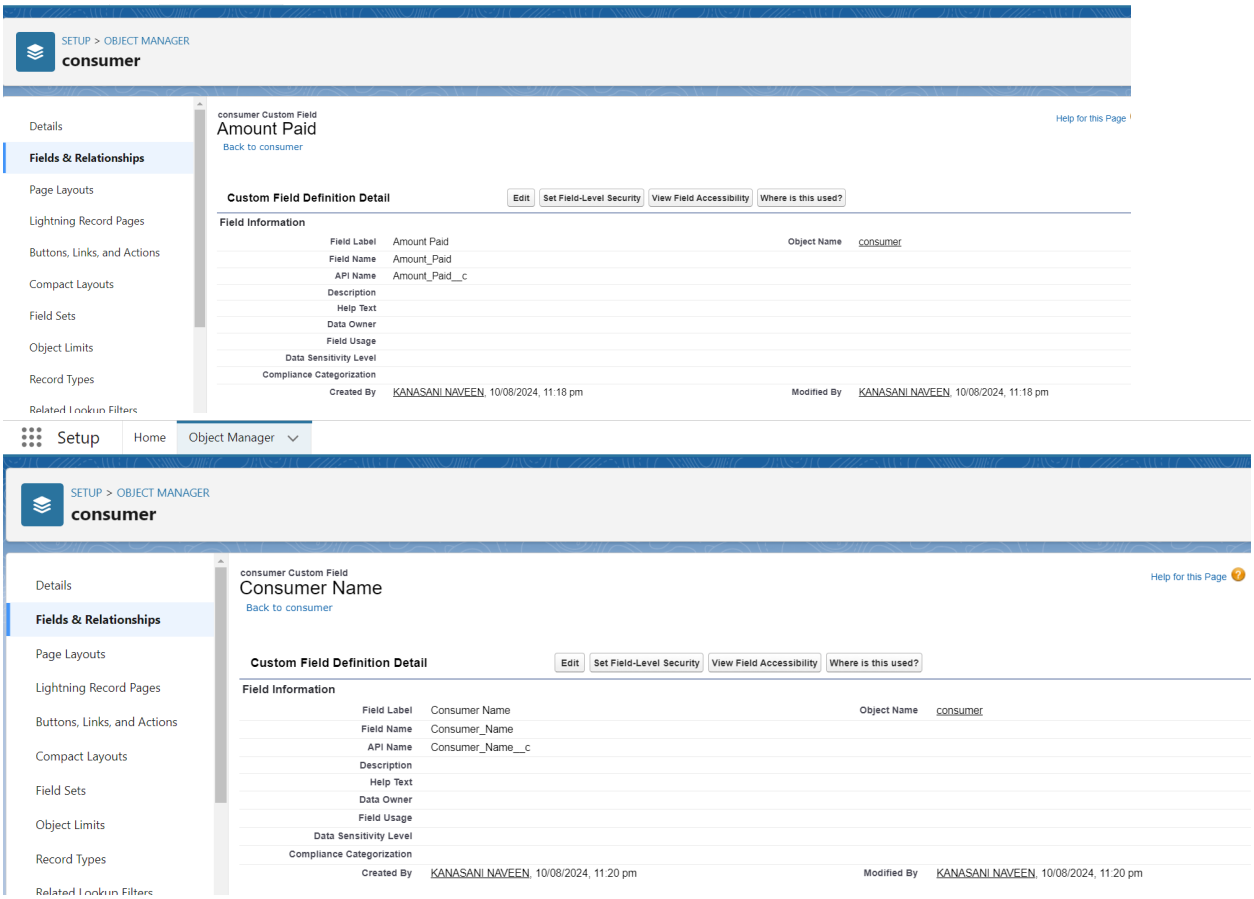
Activity 6: Creating Fields in rice mill Objects



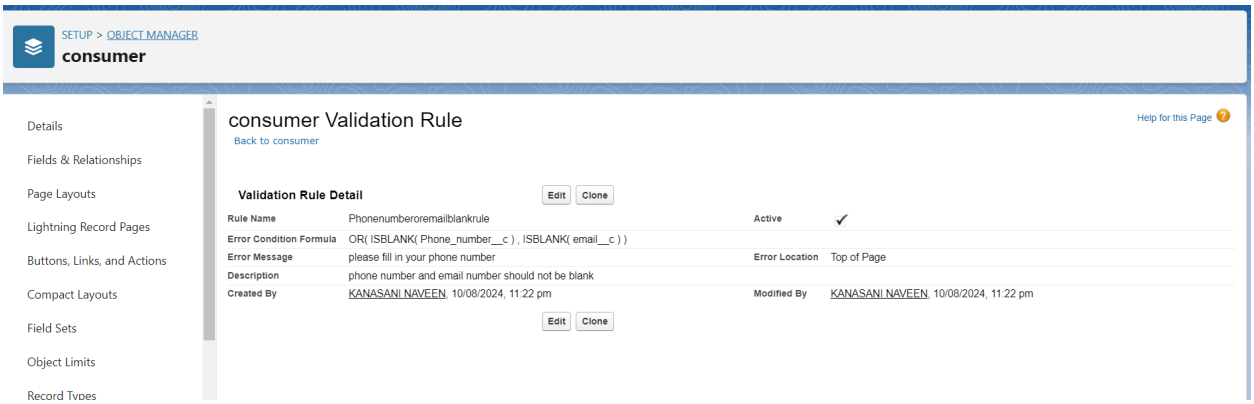
Activity 7: Creating Fields in consumer Objects



Activity 8 : Creating Cross Object Formula Field in consumer Object



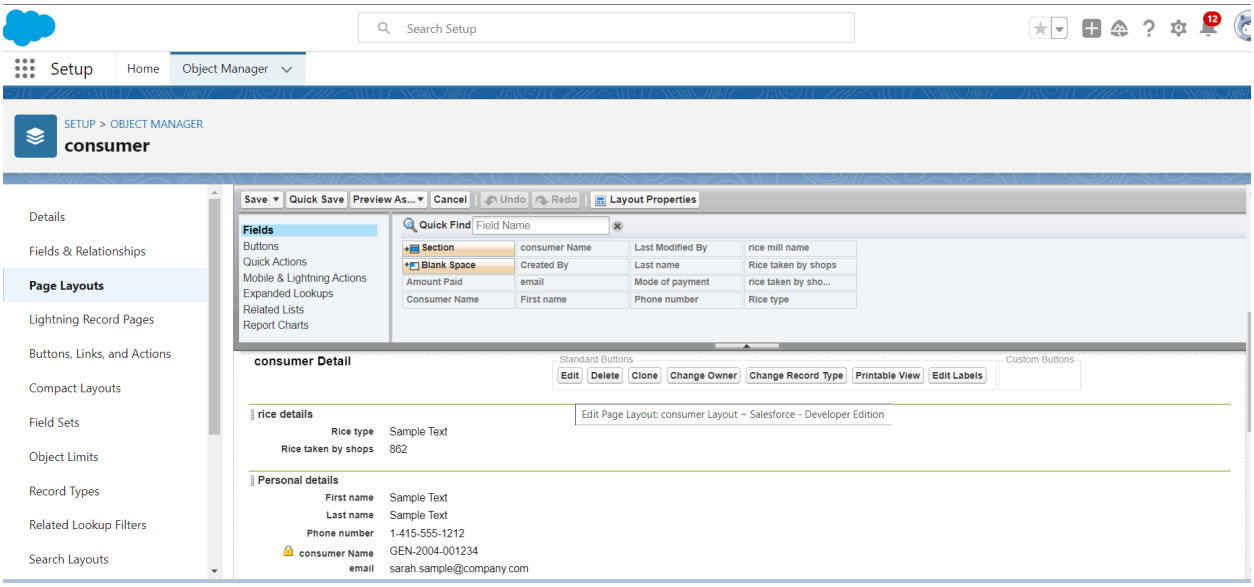
Activity 9 : Creating the validation rule



PAGE LAYOUTS

Page Layout in Salesforce allows us to customize the design and organize detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

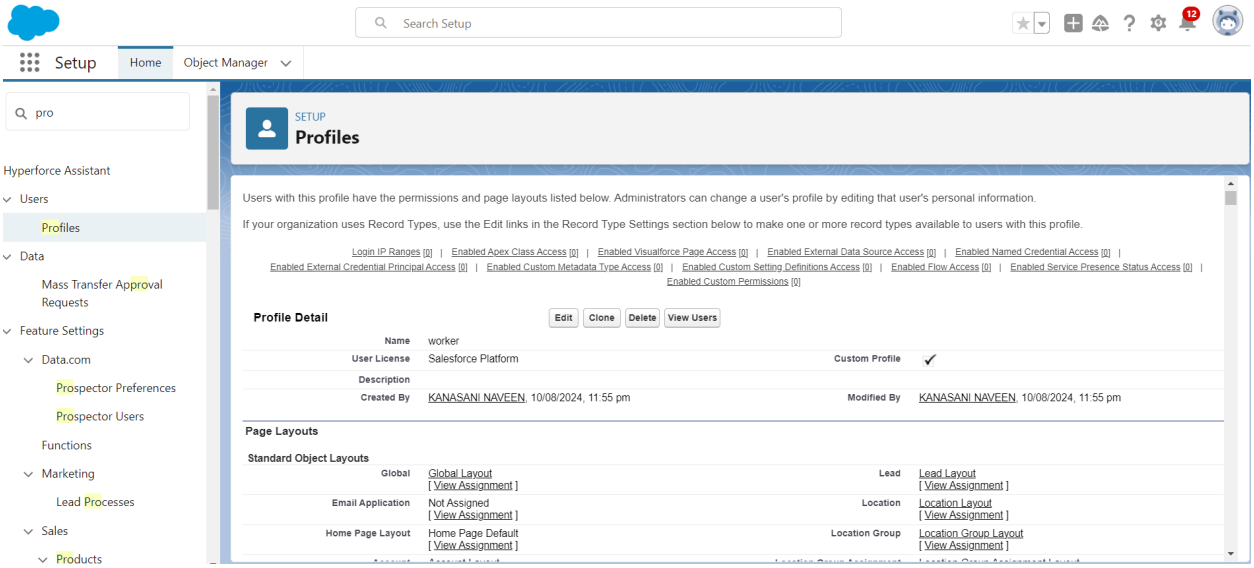
Activity 1 : creating the page layout



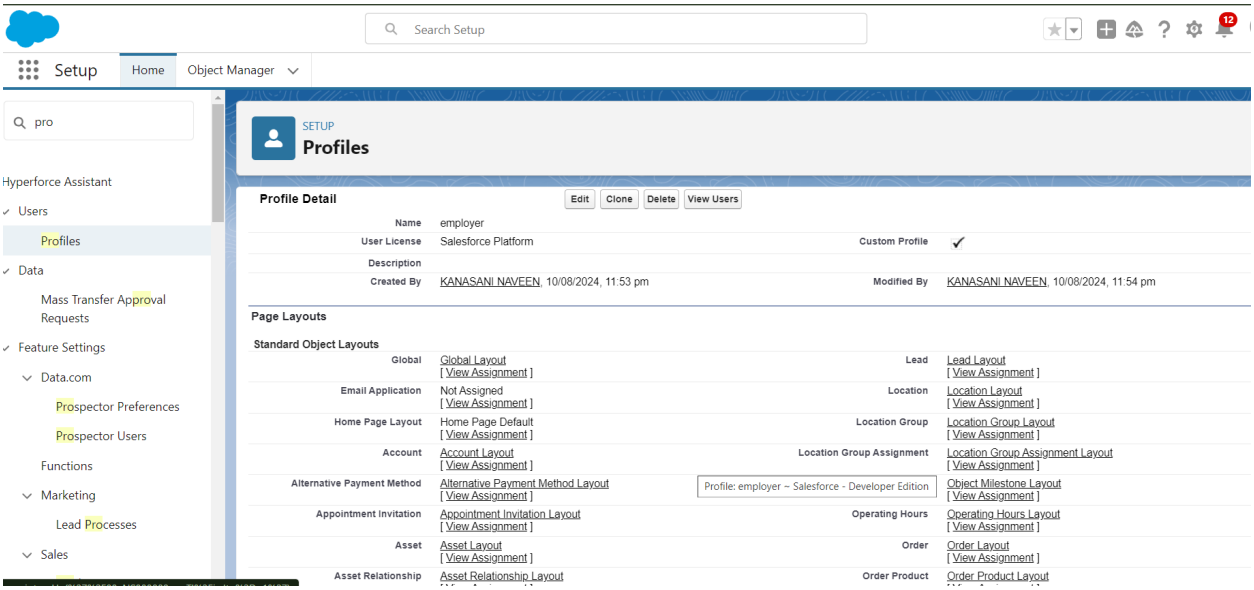
PROFILES

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.

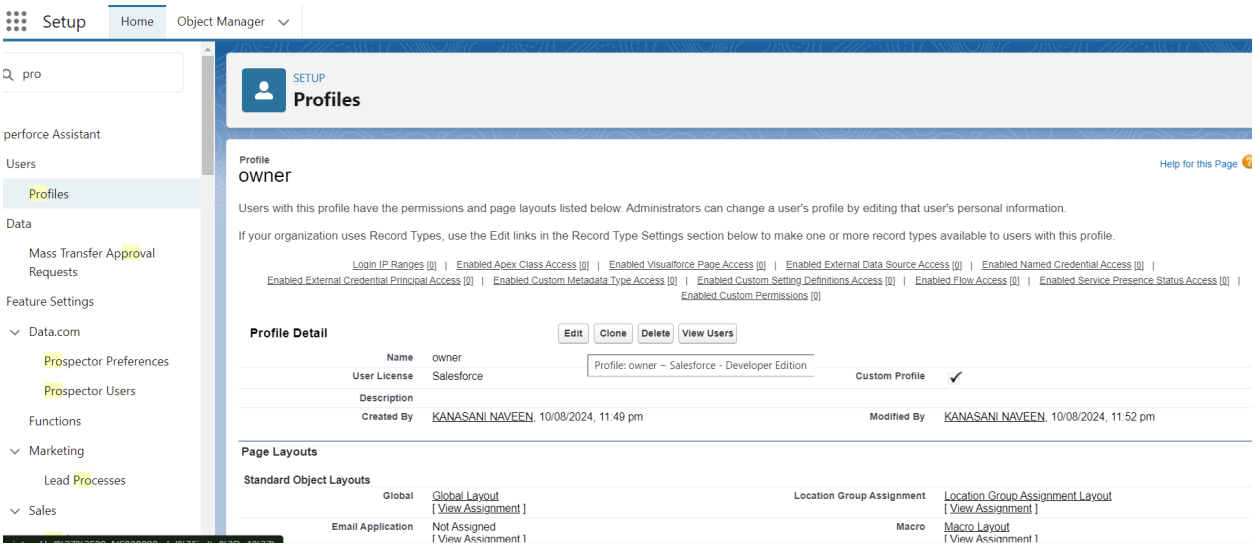
Activity 1: owner Profile



Activity 2: employer Profile



Activity 3: owner Profile

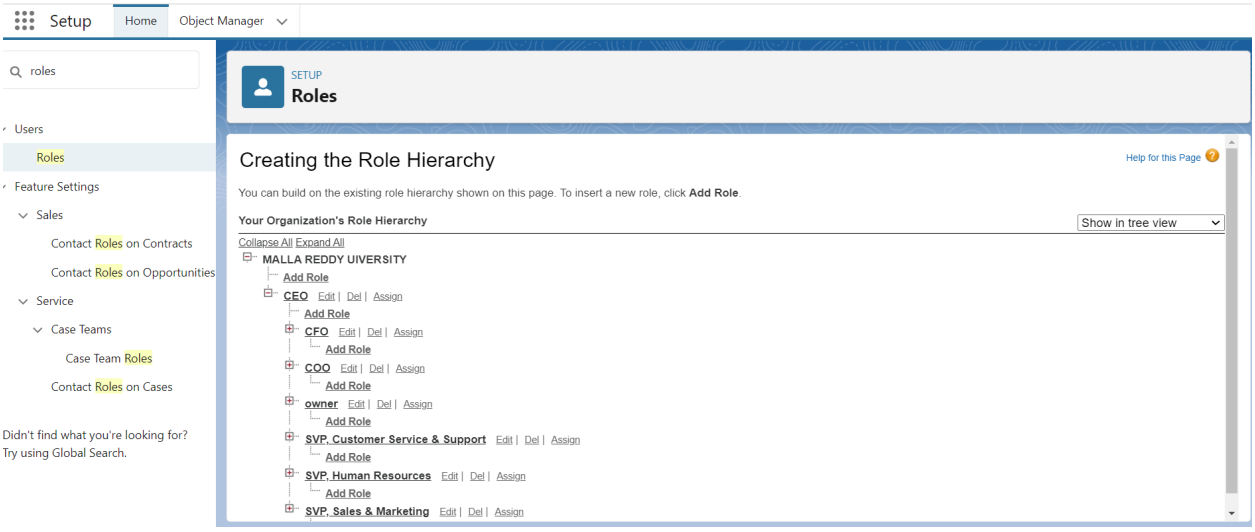


ROLE & ROLE HIERARCHY

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.

Activity 1: Creating owner Role

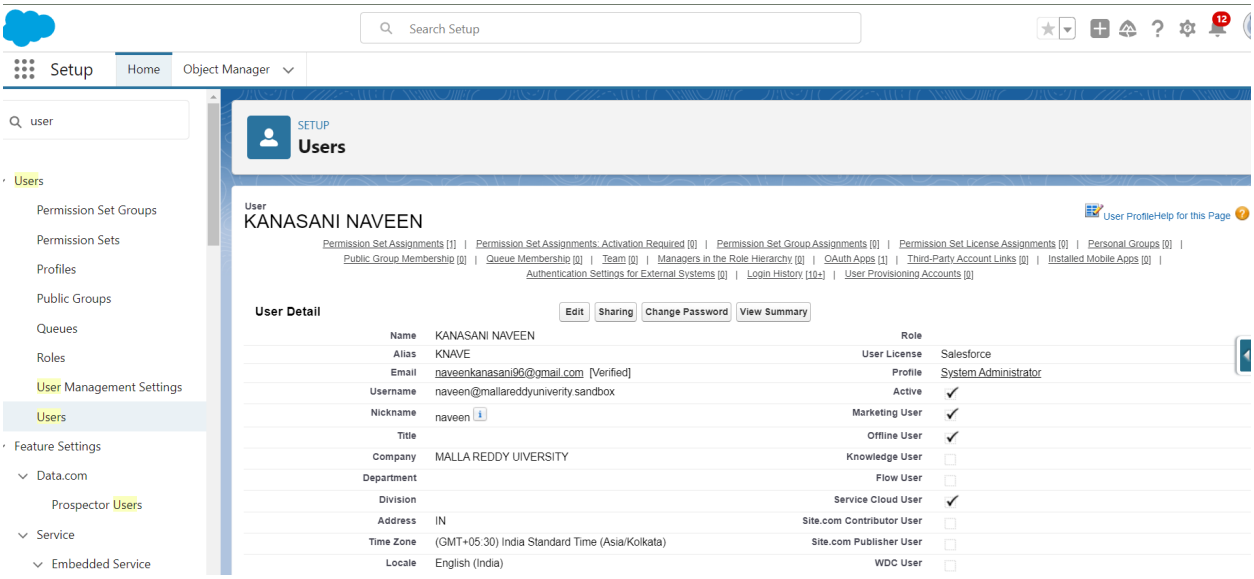
Activity 2: Creating employer roles



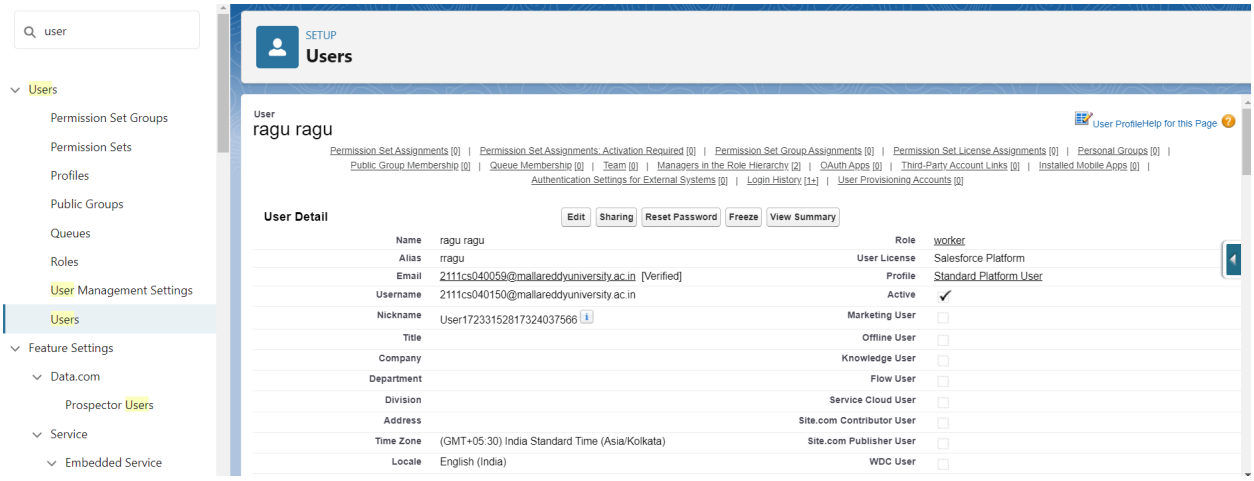
USERS

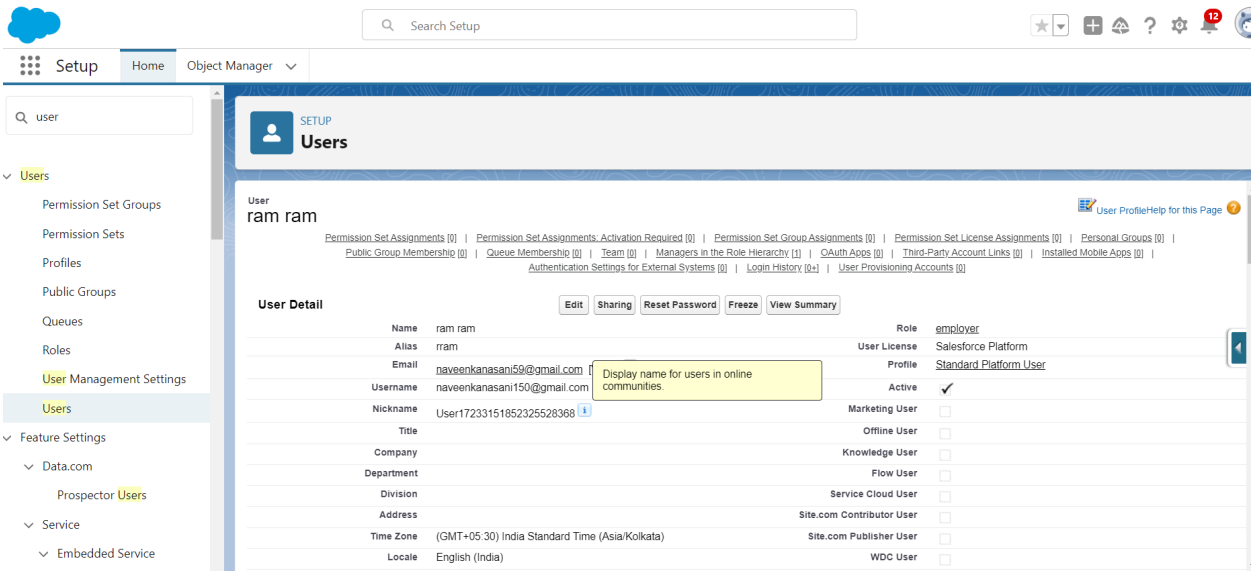
A user is anyone who logs in to Salesforce. Users are employees at your company, suchas sales reps, managers, and IT specialists, who need access to the company's records.Every user in Salesforce has a user account. The user account identifies the user, and theuser account settings determine what features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

Activity 1: Create User



Activity 2: creating another users

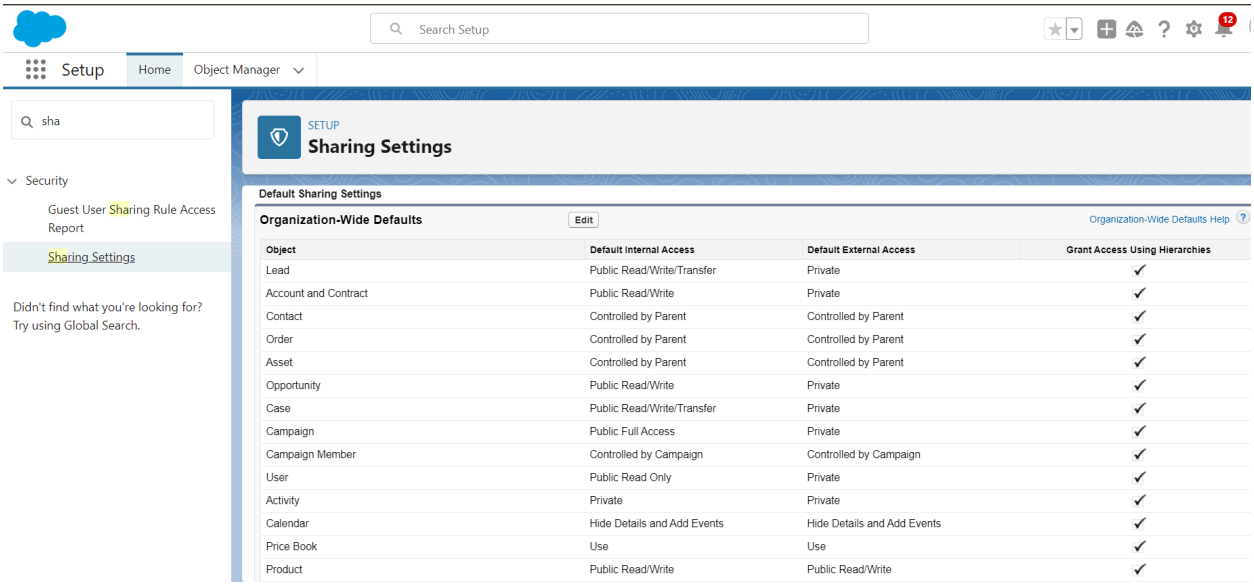


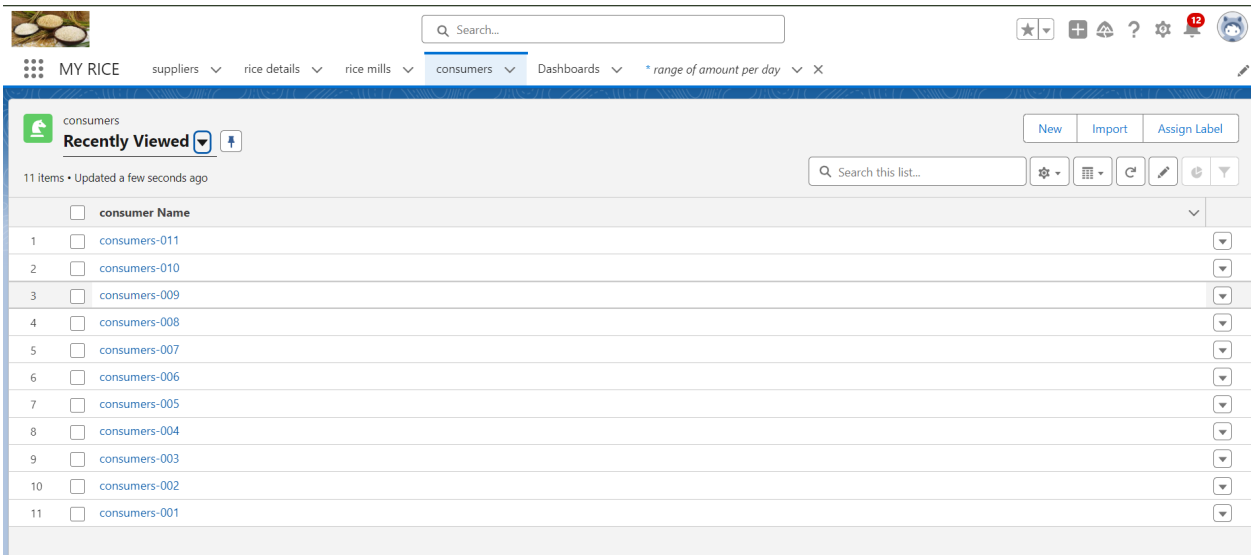


PERMISSION SETS

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.

Activity 1: Creating OWD setting.

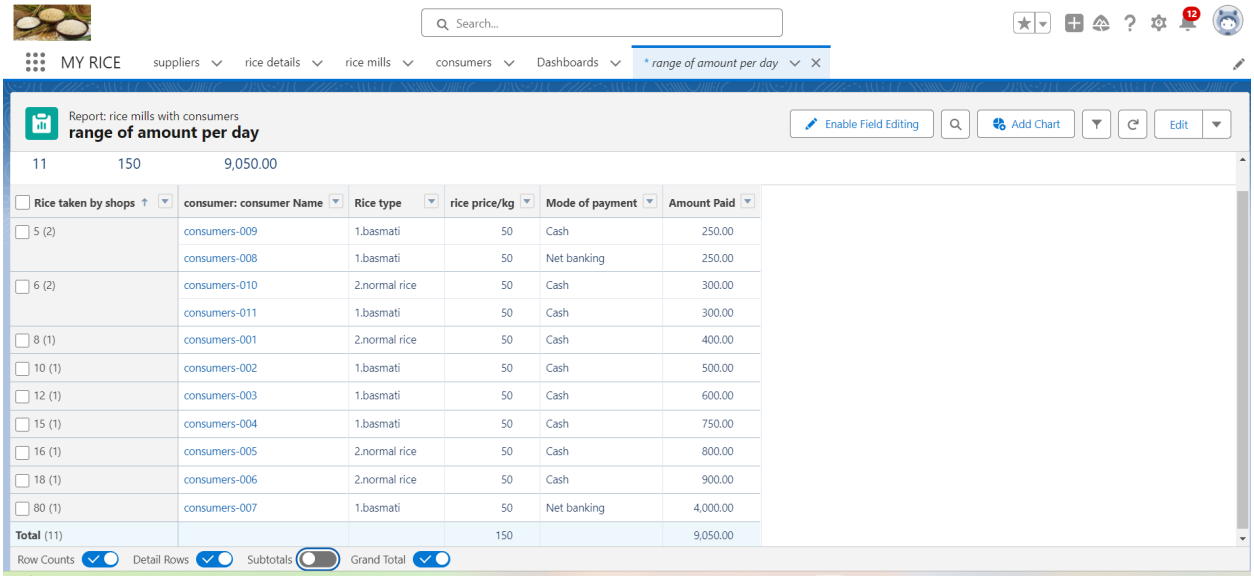




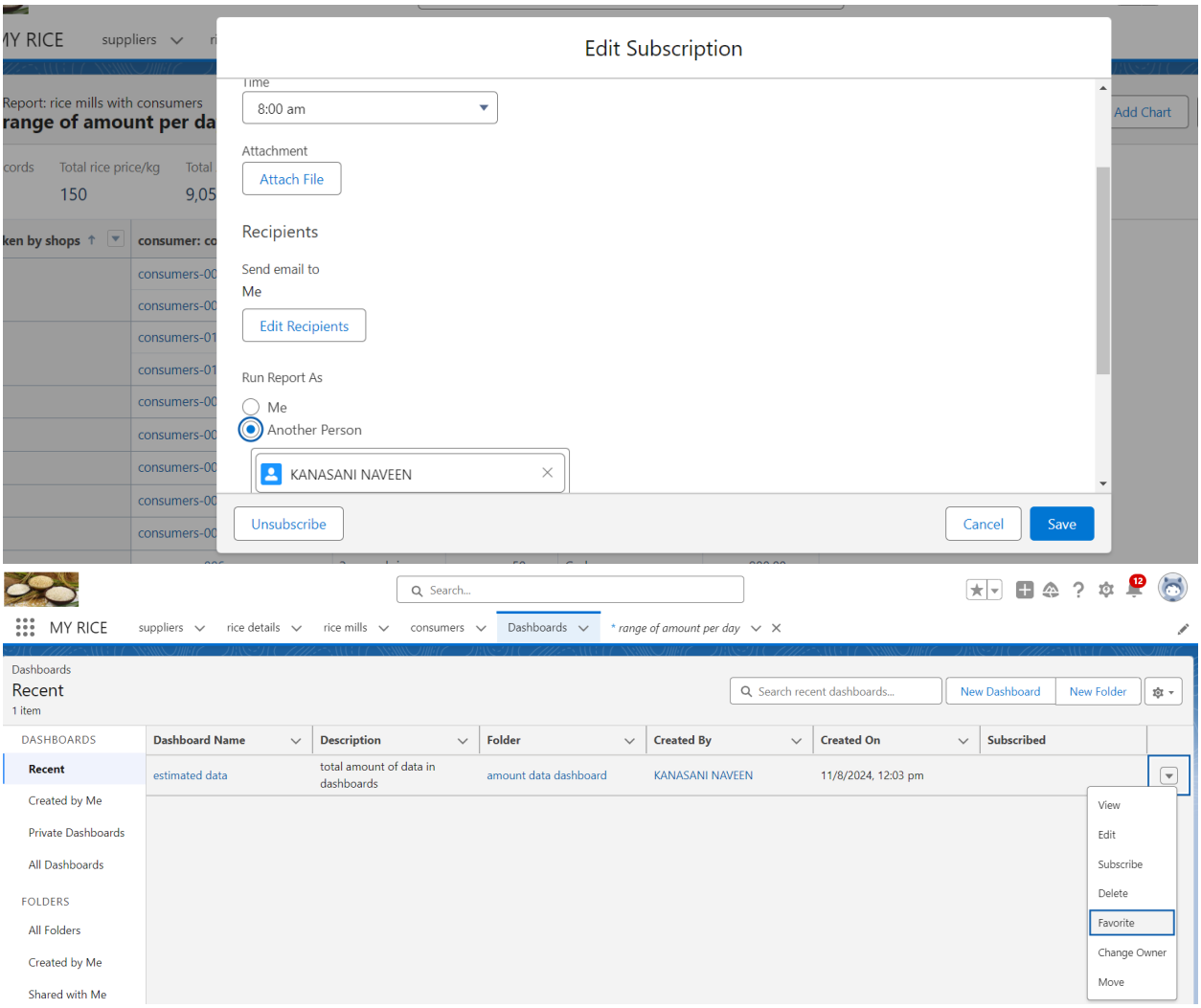
REPORTS

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 analyze your data.

Activity 1: Create Report



Activity 2: Sharing report to owner

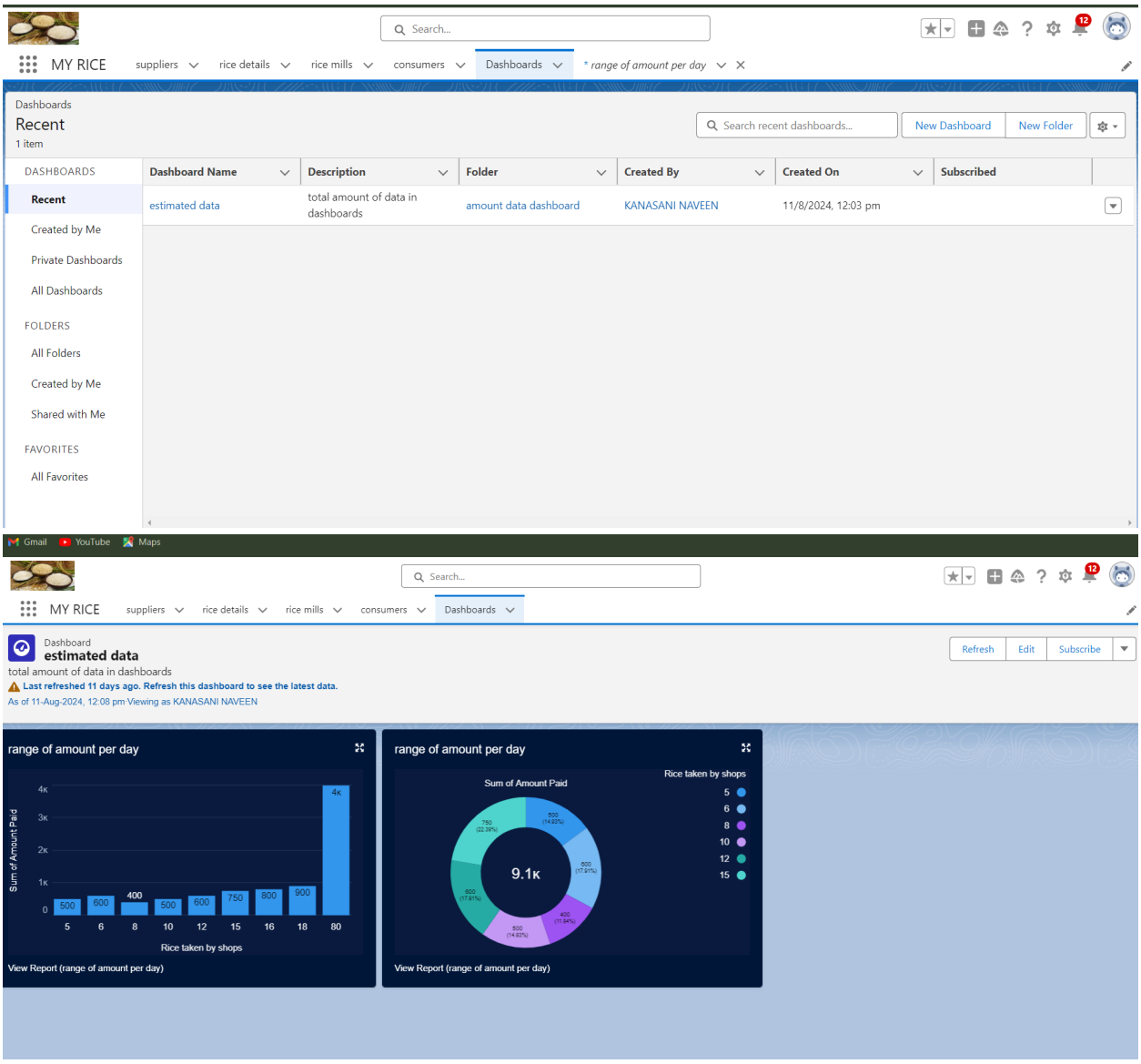


DASHBOARDS

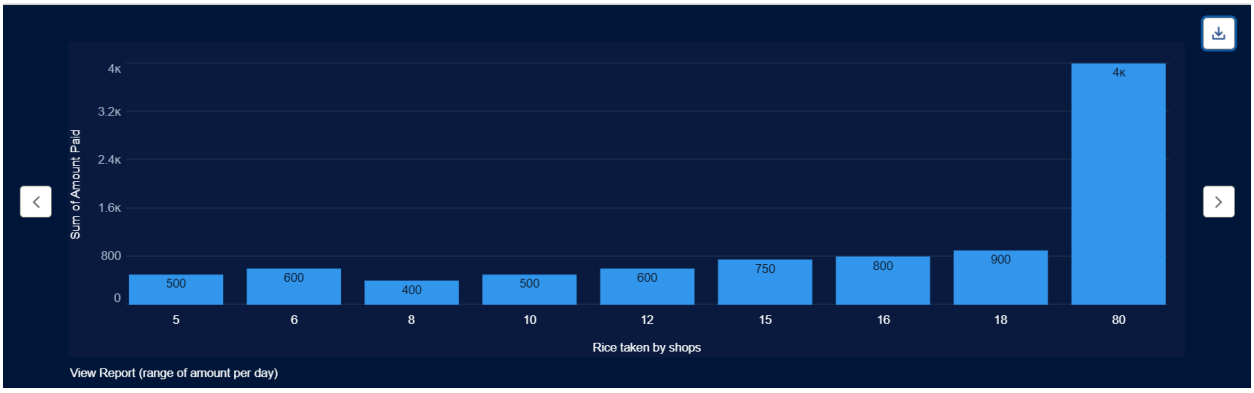
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing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

Activity 1: Create Dashboard Folder

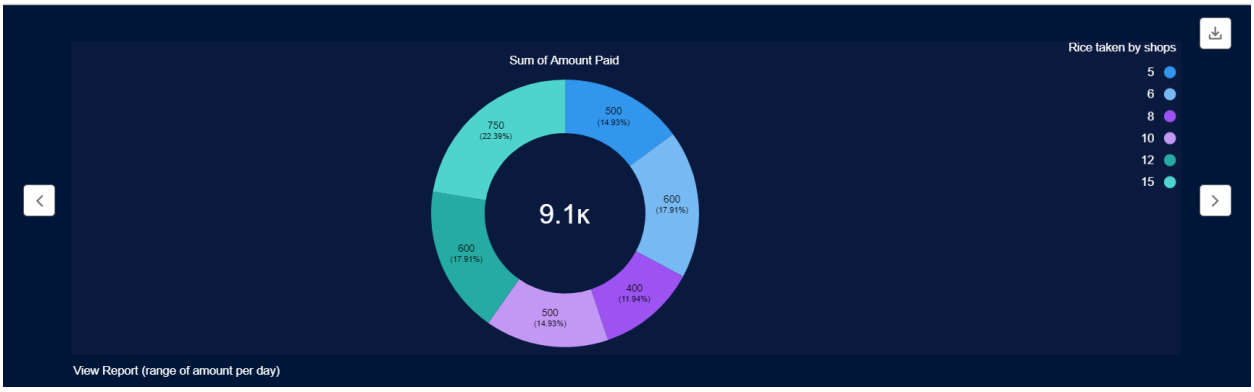
Activity 2: Create Dashboard



range of amount per day



range of amount per day



PROJECT DONE

BY

KANASANI NAVEEN