CRM Application for Wholesale Rice Mill

Overview

The Rice Mill CRM Application is a comprehensive solution developed to optimize the operations of a rice mill factory by leveraging customer relationship management (CRM) technology. This application is designed to track and report essential data daily, including the quantity of rice processed, rice sales, and customer preferences. The key aim is to deliver a user-friendly tool that provides owners with detailed insights to enhance decision-making, improve customer service, and maximize operational efficiency.

Key Features and Functionality

1. **Daily Reporting and Dashboards**
   The application generates comprehensive reports on:

   - Quantity of rice sold per day

   - Total daily revenue

   - Customer preferences and popular rice varieties

   - Detailed analytics on the top-buying customers

These reports empower the rice mill owners by making data accessible and easy to interpret, helping them in effective resource planning and allocation for future operations.

2. **Rollup Summary Fields**
   Rollup summary fields aggregate data from child objects (such as rice supply details) to parent objects (like suppliers). Functions like **COUNT, SUM, MIN, and MAX** can be used to calculate values such as the total amount of rice supplied from a supplier.

3. **Cross-Object Formula Fields**
   This feature allows the calculation of values across related objects. For instance, the application can calculate the total payable amount by multiplying the number of rice bags taken by the price per kilogram, giving owners instant financial insights.

4. **Validation Rules**
   The application includes validation rules to ensure data integrity. The **IsBlank formula** is used to check if a field is empty and displays an error message if it is. This ensures that required fields are never left blank, reducing data entry errors.

5. **Permission Sets**
   The system utilizes **Organization-Wide Defaults (OWD)** in Salesforce to manage access control. Roles are assigned as follows:

   - **Owners** can view both employer and worker records.

   - **Employers** can view only worker records.

This role-based access ensures proper data security and privacy while granting appropriate permissions to each level of user.

Pre-requisites

To work on this CRM application for a rice mill, the following requirements are necessary:

- A **Salesforce Developer Account**.

- Fundamental knowledge of **Salesforce Admin concepts**.

- A machine equipped with at least **two web browsers**.

- **Good internet connectivity** to ensure smooth access to Salesforce.

Learning Outcomes

By completing this project, you will gain practical experience in:

- Building a **real-time Salesforce project** tailored for a rice mill.

- Understanding **object relationships** in Salesforce.

- Creating and using **formula fields** and **validation rules**.

- Implementing **cross-object formula fields**.

- Configuring **page layouts** for ease of use.

- Developing and utilizing **rollup summary fields**.

- Generating detailed **reports and dashboards** to track key metrics.

This application simplifies the operational aspects of a rice mill, improves decision-making, and enhances customer relationship management through effective data reporting and insightful dashboards.