

A CRM Application for Wholesale Rice Mill



A Project Report Submitted to

SKILLWALLET (Smart Bridge)

in partial fulfillment of the requirements for the
Salesforce Developer Virtual Internship

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ABSTRACT

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 wise. 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.

Features and Functionality:

Reporting and Dashboards: The application can generate detailed reports and analytics regarding daily how much rice sold and total income per daily, 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 number of rices 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 is blank formula is used to verify whether it is blank it shows error.

Permission sets:

Organization Wide Defaults (OWD) in salesforce is the baseline level of access that the most restricted user should have. Organizational 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.

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1. INTRODUCTION

The Rice Mill CRM Application is a comprehensive solution designed to streamline and simplify daily operations in a rice mill factory. It leverages the power of customer relationship management (CRM) to enhance customer experiences, optimize store operations, and improve overall efficiency. This project aims to develop a user-friendly and feature-rich application that addresses the specific needs of a rice mill factory. Features and Functionality:

Reporting and Dashboards: The application generates detailed reports and analytics regarding daily rice sales, total income, revenue generated, popular products, and top customers. These easy-to-understand reports help owners improve resource allocation and plan for future development.

Rollup Summary Field: This field summarizes data from a child object to a parent object in a master-detail relationship. It can use COUNT, SUM, MIN, and MAX functions. For example, it can display the total value (amount of rice supplied) from rice details on a related supplier.

Cross-Object Formula Field: This formula field references fields from another object in Salesforce. It calculates the total amount owed by multiplying the number of rice units taken by the price per kilogram, displaying the total amount payable.

Validation Rules: Validation rules include error messages that display when the rule returns a value of “True” due to an invalid entry. For this project, the IsBlank formula is used to check for blank values and show an error if a required field is empty.

Permission Sets: Organization-Wide Defaults (OWD) in Salesforce set the baseline level of access for the most restricted user. In this project, roles are created such that the owner can see employer and worker records, while the employer can see worker records. This ensures appropriate access and security. Overall, the Rice Mill CRM Application is designed to provide valuable insights and streamline processes, making it an essential tool for any rice mill factory.

1.1 Problem Statement

In the highly competitive rice milling industry, efficient management and streamlined operations are crucial for maintaining profitability and customer satisfaction. Rice mill factories face numerous challenges, including tracking daily rice production, managing sales, monitoring inventory, and ensuring accurate financial reporting. Traditional manual methods and disparate systems often lead to inefficiencies, data inaccuracies, and a lack of real-time insights, hindering effective decision-making and resource allocation. Rice mill owners need a comprehensive solution that can integrate various aspects of their operations, providing a unified platform for tracking production, sales, and revenue.

They require detailed, daily reports that offer insights into how much rice is produced and sold, which types of rice are most popular, and who the top customers are. Additionally, the solution must ensure data accuracy, secure access control, and ease of use for different user roles within the organization. Therefore, there is a need for a robust Customer Relationship Management (CRM) application specifically tailored to the unique requirements of rice mill factories. This application should provide advanced reporting capabilities, automated data summarization, cross-object calculations, and validation rules to enhance operational efficiency and accuracy. It should also include flexible permission settings to ensure that data is accessible only to authorized personnel, based on their roles and responsibilities. The Rice Mill CRM Application aims to address these challenges by delivering a feature-rich, user-friendly solution that optimizes daily operations, enhances customer experiences, and supports informed decision-making in rice mill factories.

1. MODULES

2.1 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

2.1.1 Consumer Object

The screenshot shows the Salesforce Setup interface for the 'consumer' object. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and several utility icons. Below the navigation bar, the 'Setup' menu is open, showing 'Home' and 'Object Manager'. The 'Object Manager' section is selected, and the 'consumer' object is highlighted. The left sidebar contains a list of configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The 'Details' section is active, displaying the following information:

Field	Value
Description	
API Name	consumer__c
Custom	✓
Singular Label	consumer
Plural Label	consumers
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

2.1.2 Rice details Object

The screenshot shows the Salesforce Setup interface for the 'rice details' object. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and several utility icons. Below the navigation bar, the 'Setup' menu is open, showing 'Home' and 'Object Manager'. The 'Object Manager' section is selected, and the 'rice details' object is highlighted. The left sidebar contains a list of configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The 'Details' section is active, displaying the following information:

Field	Value
Description	
API Name	rice_details__c
Custom	✓
Singular Label	rice details
Plural Label	rice details
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

2.1.3 Ricemill Object

Setup Home Object Manager

SETUP > OBJECT MANAGER
rice mill

Details Edit Delete

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Details

Description

API Name
rice_mill__c

Custom
✓

Singular Label
rice mill

Plural Label
rice mills

Enable Reports
✓

Track Activities

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

2.1.4 Supplier Object

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
supplier

Details Edit Delete

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Details

Description

API Name
supplier__c

Custom
✓

Singular Label
supplier

Plural Label
supplier

Enable Reports
✓

Track Activities

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

2.2 Tabs

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

Types of Tabs:

Custom Tabs

Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

Web Tabs

Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.

Visualforce Tabs

Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

Lightning Component Tabs

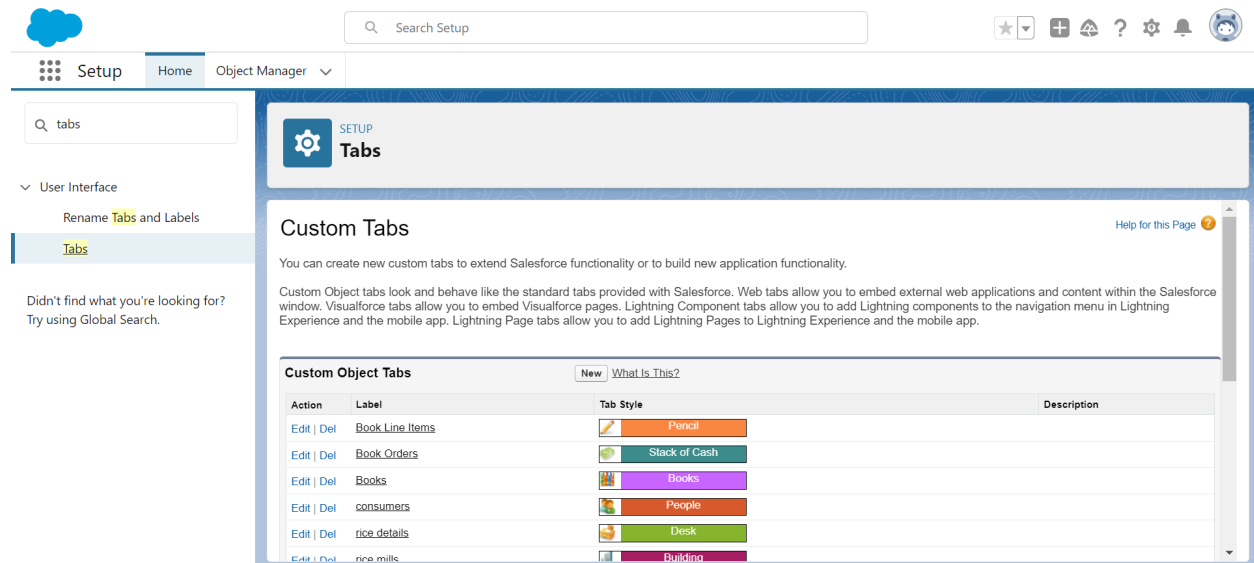
Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

Lightning Page Tabs

Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

3.2.1 Tabs



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'tabs' entered and a list of navigation items including 'User Interface' and 'Tabs'. The main content area is titled 'Custom Tabs' and includes a description: 'You can create new custom tabs to extend Salesforce functionality or to build new application functionality.' Below this is a table of 'Custom Object Tabs' with columns for Action, Label, Tab Style, and Description. The table lists several tabs: 'Book Line Items' (Pencil style), 'Book Orders' (Stack of Cash style), 'Books' (Books style), 'consumers' (People style), 'rice details' (Desk style), and 'rice mills' (Building style).

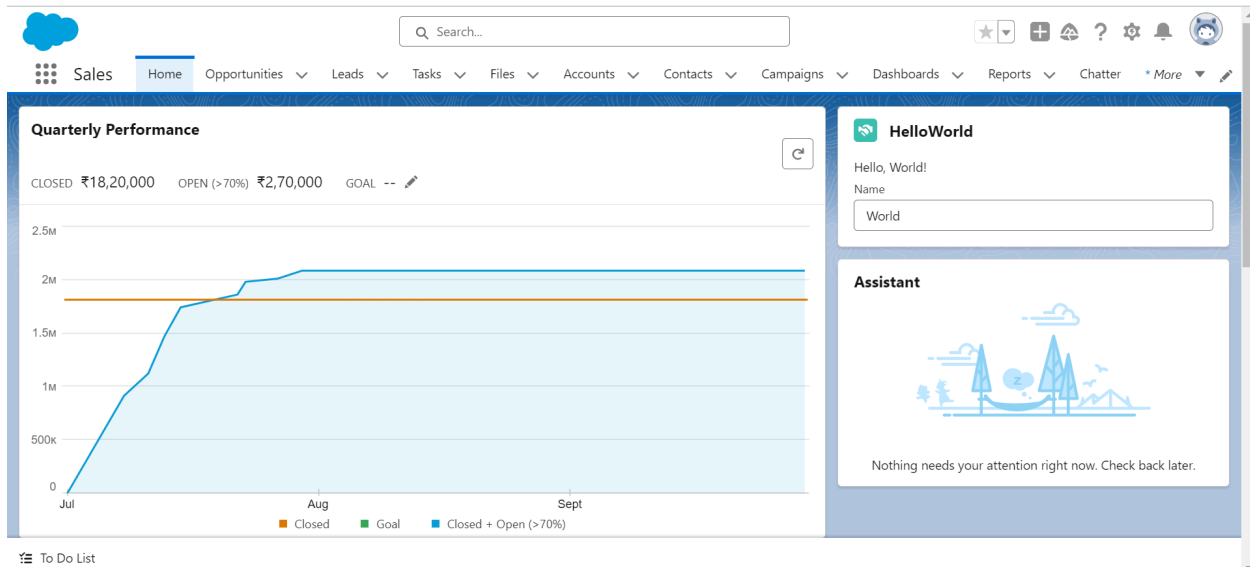
Action	Label	Tab Style	Description
Edit Del	Book Line Items	Pencil	
Edit Del	Book Orders	Stack of Cash	
Edit Del	Books	Books	
Edit Del	consumers	People	
Edit Del	rice details	Desk	
Edit Del	rice mills	Building	

2.3 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.

2.3.1 The lightning App



2.4 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.

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

1. Created By
2. Owner
3. Last Modified
4. Field Made During object Creation

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

2.4.1 Consumer Field

Setup

Home

Object Manager ▾

SETUP > OBJECT MANAGER
consumer

Details
Fields & Relationships
 Page Layouts
 Lightning Record Pages
 Buttons, Links, and Actions
 Compact Layouts
 Field Sets
 Object Limits
 Record Types
 Related Lookup Filters

Fields & Relationships
 14 Items, Sorted by Field Label

[New](#)
[Deleted Fields](#)
[Field Dependencies](#)
[Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid__c	Formula (Number)		
Consumer Name	Consumer_Name__c	Formula (Text)		
consumer Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
email	email__c	Email		
first name	first_name__c	Text(5)		

2.4.2 Rice details Field

Setup

Home

Object Manager ▾

SETUP > OBJECT MANAGER
rice details


Details
Fields & Relationships
 Page Layouts
 Lightning Record Pages
 Buttons, Links, and Actions
 Compact Layouts
 Field Sets
 Object Limits
 Record Types
 Related Lookup Filters

Fields & Relationships
 7 Items, Sorted by Field Label








[New](#)
[Deleted Fields](#)
[Field Dependencies](#)
[Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
rice details Name	Name	Auto Number		✓
rice distributed	rice_distributed__c	Number(5, 0)		
rice mill 1(one)	rice_mill_1_one__c	Master-Detail(rice mill)		✓
supplier Name1	supplier_Name1__c	Number(5, 0)		

2.4.3 Rice mill Field



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER
rice mill

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup Filters

Fields & Relationships


6 Items, Sorted by Field Label

Quick Find








NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
rice mill Name	Name	Auto Number		✓
rice price/kg	rice_price_kg__c	Number(5, 0)		
rice taken	rice_taken__c	Roll-Up Summary (SUM consumer)		

2.4.4 Supplier Fields



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER
supplier

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup Filters

Fields & Relationships

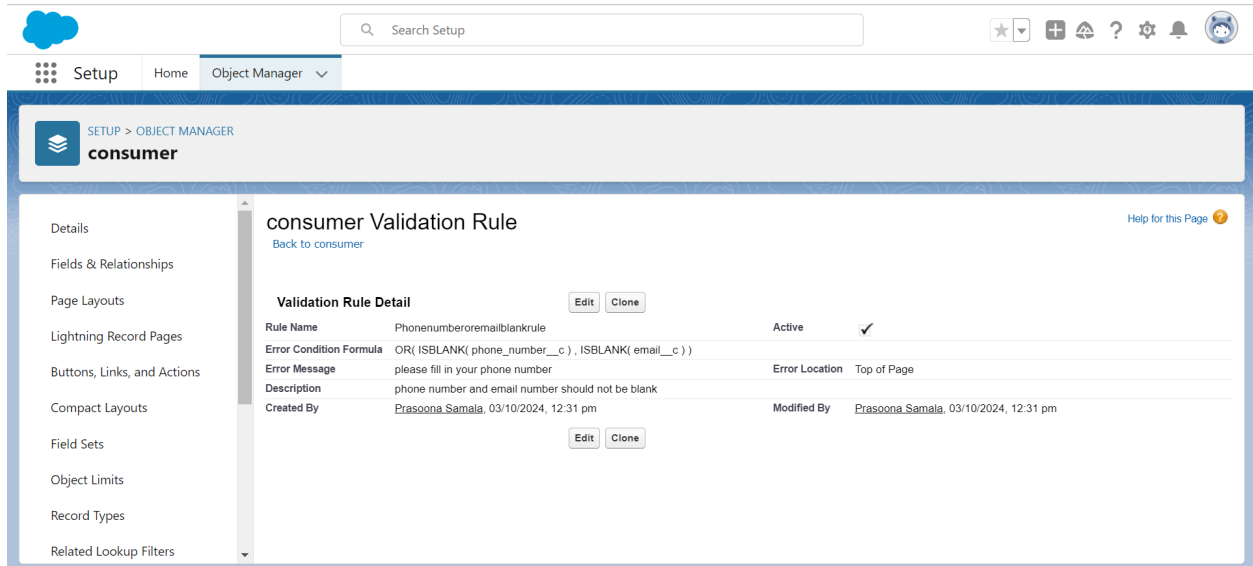
6 Items, Sorted by Field Label

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
rice distributed to shops	rice_distributed_to_shops__c	Roll-Up Summary (SUM rice details)		
sum of rice distributed	sum_of_rice_distributed__c	Roll-Up Summary (SUM rice details)		
supplier Name	Name	Text(80)		✓

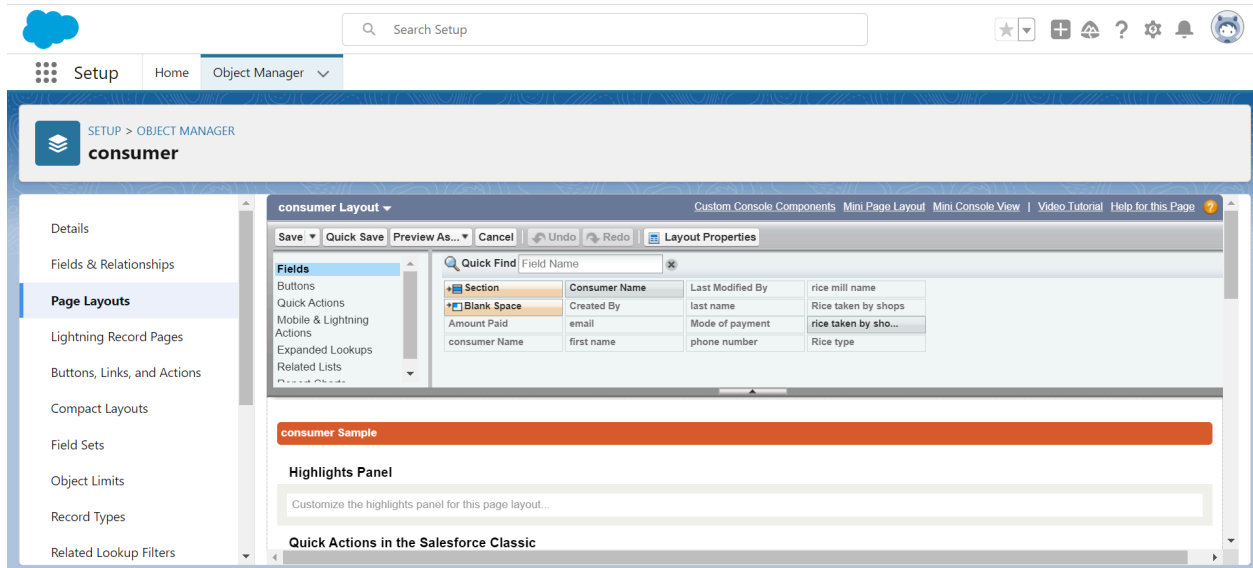
2.4.5 Consumer Validation Rules



2.5 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.

2.5.1 Consumer Page Layout



2.6 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.

Types of profiles in salesforce :

Standard profiles:

By default salesforce provides below standard profiles.

1. Contract Manager
2. Read Only
3. Marketing User
4. Solutions Manager
5. Standard User
6. System Administrator.

We cannot deleted standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

Custom Profiles:

Custom ones defined by us.

They can be deleted if there are no users assigned with that particular one.

2.6.1 Owner Profile

The screenshot displays the Salesforce Setup interface for the 'owner' profile. The left sidebar shows the 'Setup' menu with 'Profiles' selected under 'Users'. The main content area is titled 'Profiles' and shows the details for the 'owner' profile. It includes a list of permissions (Login IP Ranges, Apex Class Access, Visualforce Page Access, External Data Source Access, Named Credential Access, External Credential Principal Access, Custom Metadata Type Access, Custom Setting Definitions Access, Flow Access, Service Presence Status Access, Custom Permissions) and a 'Profile Detail' section with fields for Name, User License, Description, Created By, and Modified By. The 'Page Layouts' section is also visible at the bottom.

Profile Detail	
Name	owner
User License	Salesforce Platform
Description	
Created By	Prasoon Samala, 04/10/2024, 11:10 am
Modified By	Prasoon Samala, 04/10/2024, 11:10 am

2.6.2 Employer Profile

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'profile' and a list of items including 'Users' and 'Profiles'. The main content area is titled 'Profiles' and shows the details for the 'employer' profile. The profile name is 'employer', the user license is 'Salesforce Platform', and it is a custom profile. The description states that users with this profile have specific permissions and page layouts. The 'Profile Detail' section includes fields for Name, User License, Description, Created By (Prasoon Samala), and Modified By (Prasoon Samala). The 'Page Layouts' section shows the 'Global' layout assigned to the profile.

2.6.3 Worker Profile

The screenshot shows the Salesforce Setup interface for the 'worker' profile. The left sidebar has a search bar with 'profile' and a list of items including 'Users' and 'Profiles'. The main content area is titled 'Profiles' and shows the details for the 'worker' profile. The profile name is 'worker', the user license is 'Salesforce Platform', and it is a custom profile. The description states that users with this profile have specific permissions and page layouts. The 'Profile Detail' section includes fields for Name, User License, Description, Created By (Prasoon Samala), and Modified By (Prasoon Samala). The 'Page Layouts' section shows the 'Global' layout assigned to the profile.

2.7 Roles and 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.

2.7.1 Roles and role hierarchy

Setup Home Object Manager

Search Setup

roles

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

Didn't find what you're looking for? Try using Global Search.

Roles

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

Show in tree view

Collapsible All Expand All

Gurumanak Institutions

- Add Role
- CEO Edit | Del | Assign
 - Add Role
 - CFO Edit | Del | Assign
 - Add Role
 - COO Edit | Del | Assign
 - Add Role
 - owner Edit | Del | Assign
 - Add Role
 - SVP, Customer Service & Support Edit | Del | Assign
 - Add Role
 - SVP, Human Resources Edit | Del | Assign

2.8 User

A user is anyone who logs in to Salesforce. Users are employees at your company, such as 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 the user account settings determine what features and records the user can access.

2.8.1 Users

Setup Home Object Manager

Search Setup

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Users

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users Edit Create New User

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Awad, Younes	yawad	yawad.8ingthwubxd.5pgk1ebjzou.d89itowuggbz@gmail.com		✓	Cross Org Data Proxy User
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dd000003xc8buaq.6e4o0m07cnib@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Guison, Auggie	aguis	aguis.vbda8eoyf2nk.8gtlxwxczvp.d7gds35s5wg@gmail.com		✓	Cross Org Data Proxy User
<input type="checkbox"/> Edit	rai, ragu	rrai	samalaorasoona@gmail.com	worker	✓	Standard Platform User
<input type="checkbox"/> Edit	ram, ram	rram	prasoonaasamala21@gmail.com	employer	✓	Standard Platform User
<input type="checkbox"/> Edit	Samala, Prasoon	PSama	samalaorasoona21@gmail.com		✓	System Administrator
<input type="checkbox"/> Edit	User, Integration	integ	integration@00dd000003xc8buaq.com		✓	Analytics Cloud Integration User

2.9 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.

2.9.1 Sharing Settings

The screenshot shows the Salesforce 'Sharing Settings' page. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar has a search bar and a list of options: 'Security', 'Guest User', 'Sharing Rule Access Report', and 'Sharing Settings'. The main content area is titled 'Sharing Settings' and includes a 'Manage sharing settings for:' dropdown set to 'All Objects'. Below this is a 'Default Sharing Settings' section with a table of 'Organization-Wide Defaults'.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓

2.10 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 analyse your data.

Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

1. Tabula Reports: Simple listing of data without any subtotals. This type of reports provide you most basically to look at your data. Use tabular reports when you want a simple list or a list of items with a grand total.

Example: This type of reports are used to list all accounts, List of contacts, List of opportunities.....etc.....

2. Summary Reports: This type of reports provides a listing of data with groupings and sub totals. Use summary reports when you want subtotals based on the value of a particular field or when you want to create a hierarchically grouped report, such as sales organized by year and then by quarter.

Example: All opportunities for your team sub totalled by Sales Stage and Owner.


3. Matrix Reports: This type of reports allows you to group records both by row and by column. A comparison of related totals, with totals by both row and column. Use matrix reports when you want to see data by two different dimensions that aren't related, such as date and product.

Example: Summarize opportunities by month vertically and by account horizontally.

4. **Joined Reports:** Blocks of related information in a single report. This type of reports enable you to adopt five different blocks to display different types of related data. Each block can own unique columns, summary fields, formulas, filters and sort order. Use joined reports to group and show data from multiple report types in different views.

Example: You can build a report to show opportunity, case and activity data for your accounts.

2.10.1 Reports



★


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🔊

?

⚙️

🔔



MY RICE

supplier

rice mills


consumers

rice details

* estimated data

* range of amount per day

* Analytics

 Report: rice mills with consumers
range of amount per day

Enable Field Editing

Q

Add Chart

▼

↺

Edit

▼

10	27	289.00				
<input type="checkbox"/> Rice taken by shops ↑	<input type="checkbox"/> Consumer Name	<input type="checkbox"/> Rice type	<input type="checkbox"/> rice price/kg	<input type="checkbox"/> Mode of payment	<input type="checkbox"/> Amount Paid	
<input type="checkbox"/> 1 (1)	pra sam	2.normal rice	rice mill: Info : rice price/kg		12.00	
<input type="checkbox"/> 2 (3)	Samal Praso	1.basmati	12	Net banking	24.00	
	Sama Pras	1.basmati	10	UPI	20.00	
	Sam Pra	1.basmati	10	UPI	20.00	
<input type="checkbox"/> 3 (2)	praso samal	2.normal rice	5	UPI	15.00	
	ashri chada	2.normal rice	5	Cash	15.00	
<input type="checkbox"/> 4 (1)	lucky sri	1.basmati	12	Debit card	48.00	
<input type="checkbox"/> 5 (3)	sai suram	2.normal rice	10	Credit card	50.00	
	Smal Paso	2.normal rice	5	Cash	25.00	
	praso sam	1.basmati	12	Cash	60.00	
Total (10)			27		289.00	

Row Counts

☒

Detail Rows

☒


Subtotals

☐

Grand Total

☒

210.1 Reports Folder Creation



★


+

🔊

?

⚙️

🔔



MY RICE

supplier

rice mills

consumers

rice details

* estimated data

* Reports

Reports

All Folders

5 items

New Report

New Folder

⚙️

REPORTS	Name	Created By	Created On	Last Modified By	Last Modified Date	
Recent	Einstein Bot Reports	Automated Process	8/6/2024, 4:43 pm	Automated Process	8/6/2024, 4:43 pm	▼
Created by Me	Einstein Bot Reports Summer '23	Automated Process	8/6/2024, 4:43 pm	Automated Process	8/6/2024, 4:43 pm	▼
Private Reports	Einstein Bot Reports Summer '22	Automated Process	8/6/2024, 4:43 pm	Automated Process	8/6/2024, 4:43 pm	▼
Public Reports	Einstein Bot Reports Winter '23	Automated Process	8/6/2024, 4:43 pm	Automated Process	8/6/2024, 4:43 pm	▼
All Reports	estimated rice per day	Prasoon Samala	4/10/2024, 11:06 pm	Prasoon Samala	4/10/2024, 11:06 pm	▼

FOLDERS

All Folders

Created by Me

Shared with Me

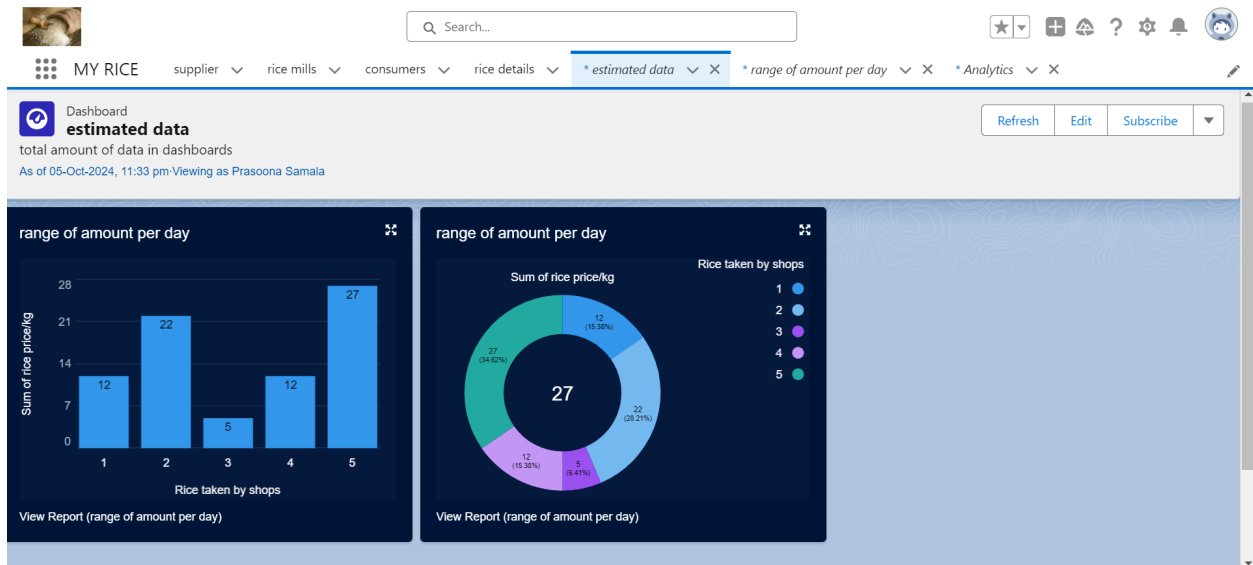
FAVORITES

2.11 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.

2.11.1 Dashboards



3. CONCLUSION AND FUTURE WORK

The Rice Mill CRM Application is poised to revolutionize the operational efficiency and customer relationship management within rice mill factories. By integrating advanced reporting capabilities, automated data summarization, cross-object calculations, and stringent validation rules, this application addresses the unique challenges faced by rice mill owners. It ensures accurate, real-time insights into daily production, sales, and revenue, facilitating informed decision-making and strategic planning.

Moreover, the application's user-friendly interface and tailored permission settings provide secure and role-based access to critical data, enhancing transparency and accountability within the organization. As a comprehensive solution, the Rice Mill CRM Application not only streamlines operations but also significantly improves resource allocation, customer satisfaction, and overall business performance.

In summary, the Rice Mill CRM Application is an essential tool for rice mill factories, designed to meet their specific needs and drive sustainable growth and success in a competitive industry.