# A CRM APPLICATION FOR WHOLESALE RICE MILL

The Rice Mill CRM Application is designed to streamline daily operations by tracking rice production, sales, and types of rice sold, generating daily reports for owners. Leveraging CRM, it enhances customer experiences, optimizes store operations, and improves overall efficiency in the rice mill factory. This user-friendly and feature-rich solution addresses the specific needs of a rice mill, ensuring comprehensive management and reporting. The application's goal is to simplify processes, enhance data accuracy, and provide valuable insights into daily performance, ultimately driving better decision-making and operational success.

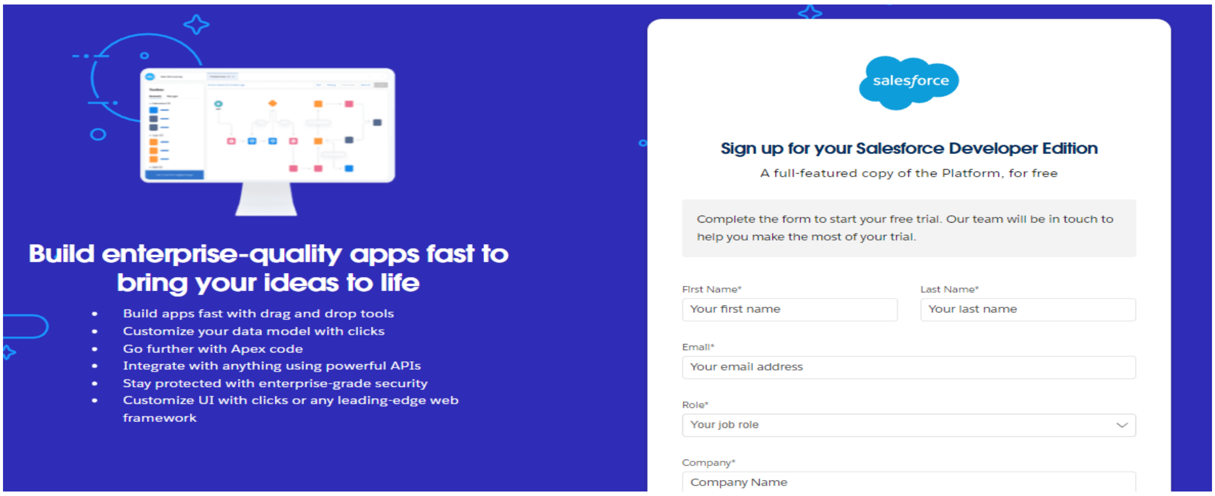
## PROCEDURE TO BUILT THE WHOLESALE RICE MILL CRM APPLICATION

## MILESTONE 1 - SALESFORCE

### 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 :



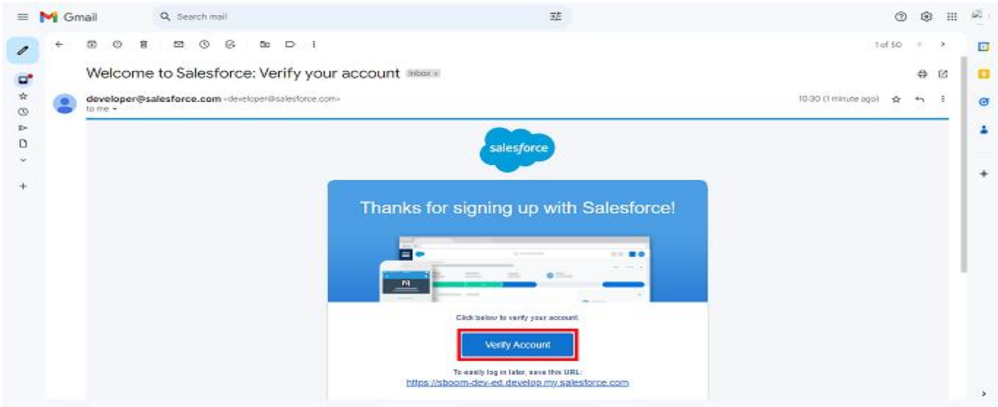

1) First name & Last name
2) Email
3) Role : Developer
4) Company : College Name
5) County : India
6) Postal Code : pin code
7) Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format : username@organization.com

Click on sign me up after filling these.

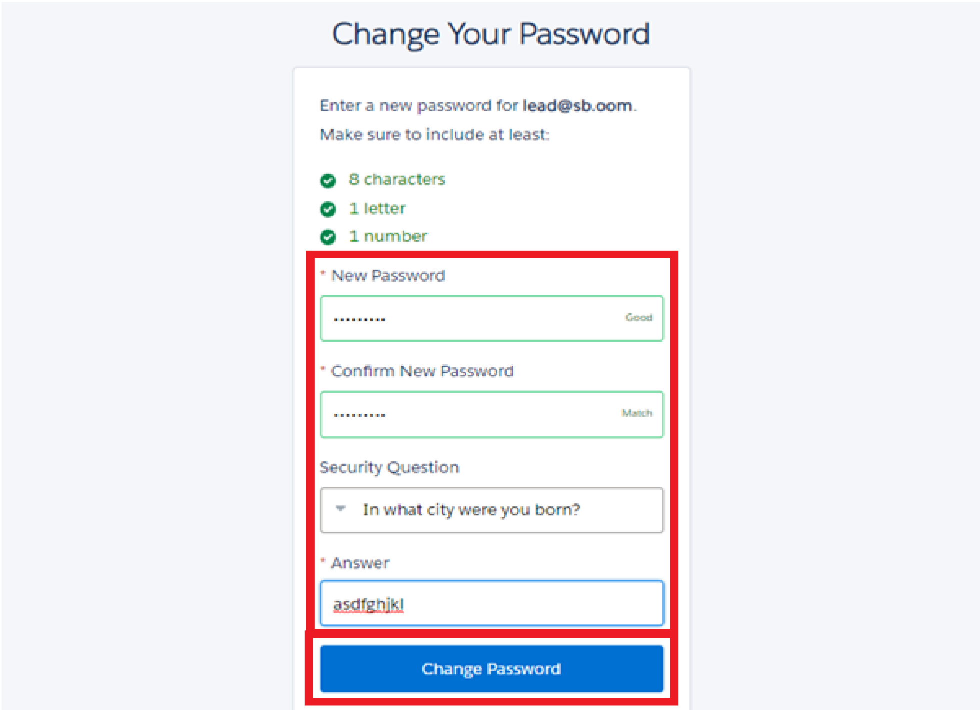
### Activity 2: Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.

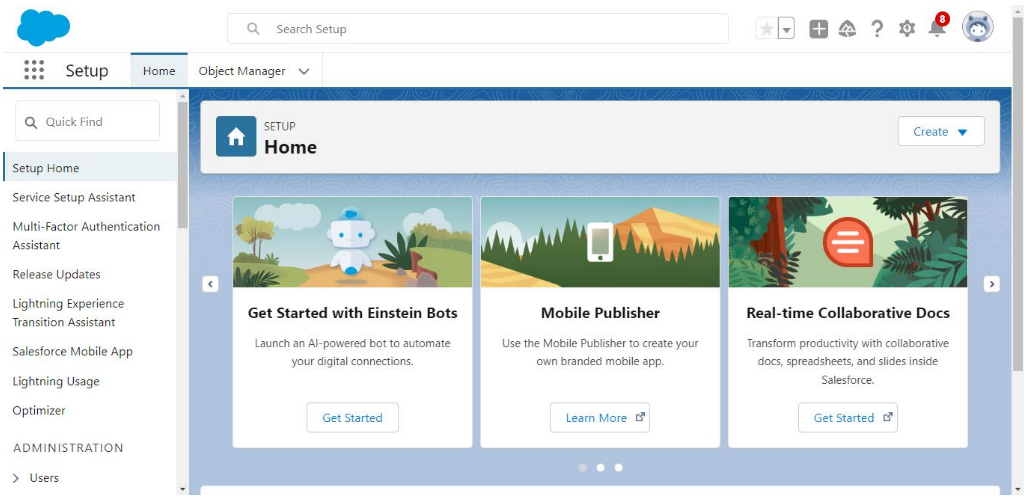



Click on Verify Account

2. Give a password and answer a security question and click on change password.

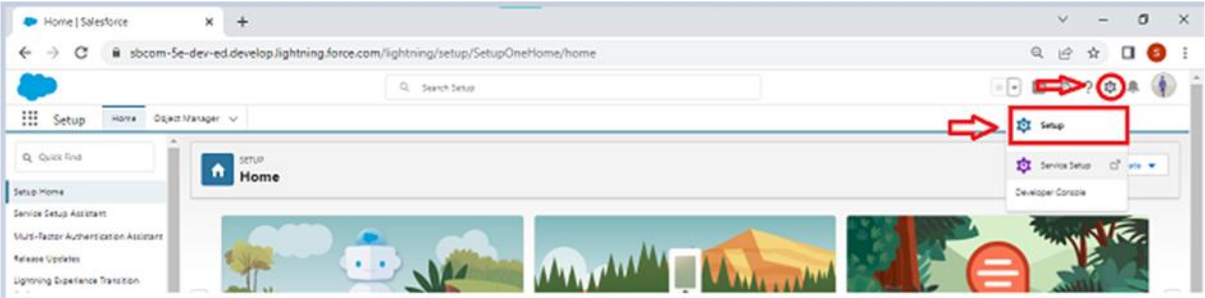



3. Then you will redirect to your salesforce setup page.



# MILESTONE 2 - OBJECT

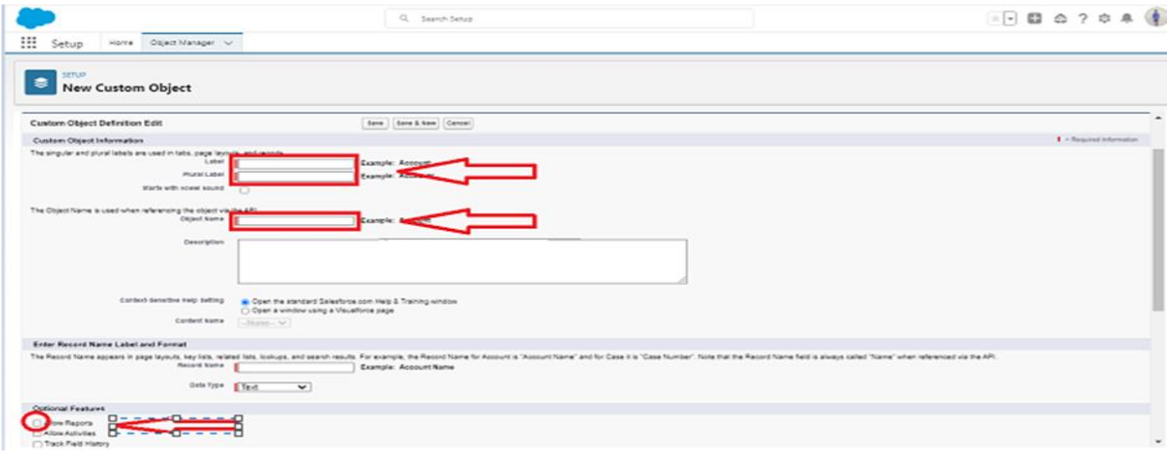
**To Navigate to Setup page:** Click on gear icon → click setup.



**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.



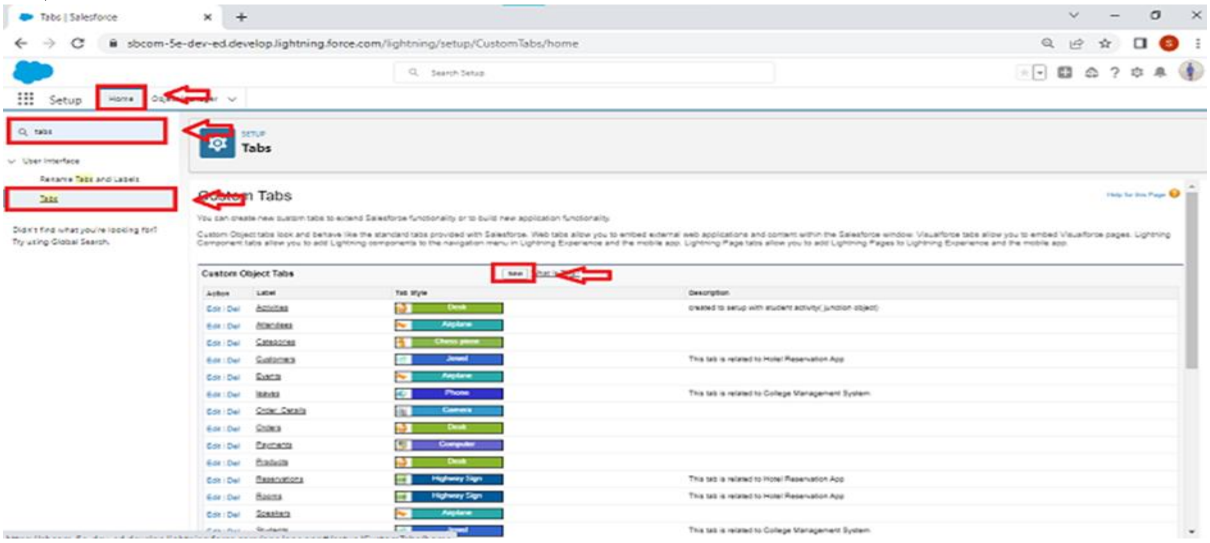


Click on save.

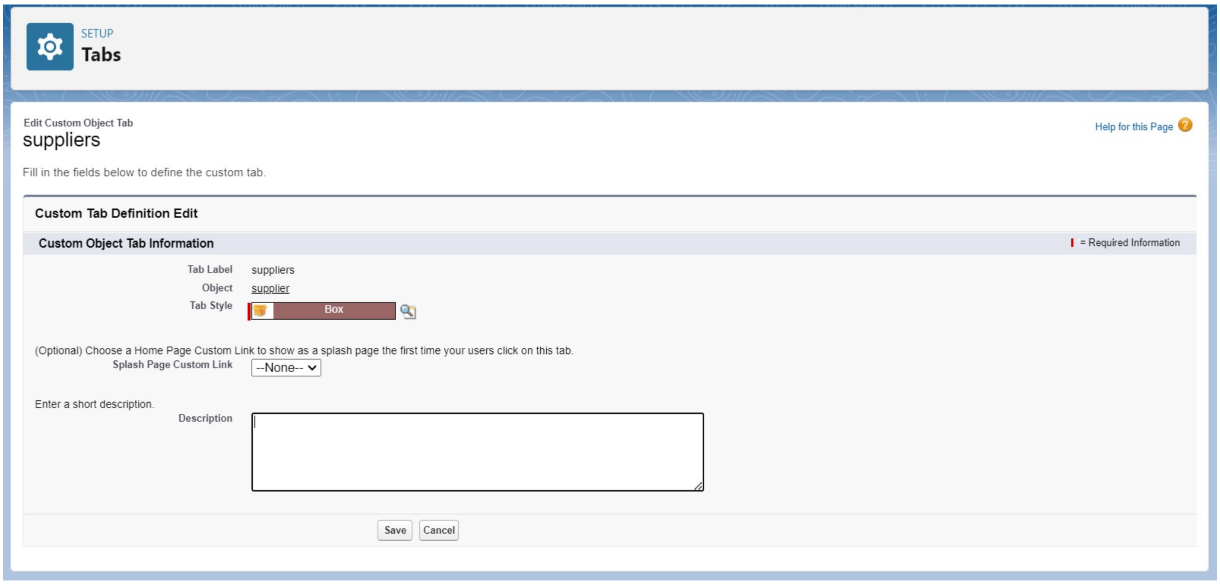
# MILESTONE 3 - TABS

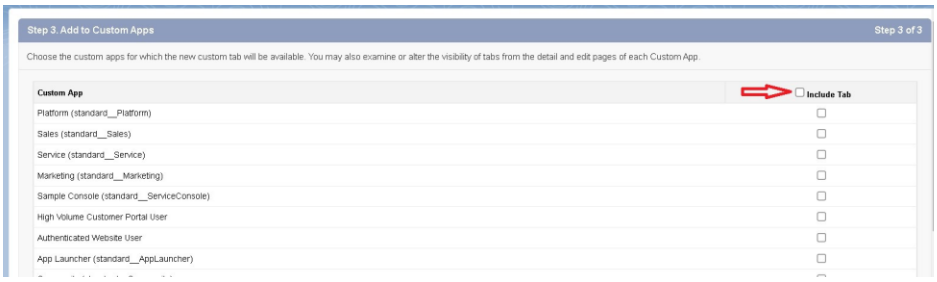
**To create a Tab:( supplier)**

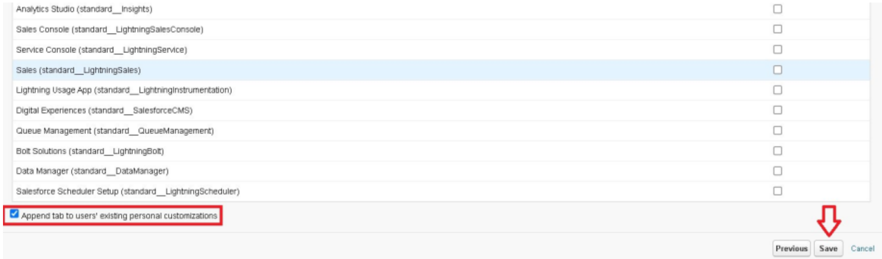
1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)




2. Select Object( supplier) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.




### Activity 2: Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “ rice mill, **consumer** , rice details”.
2. Follow the same steps as mentioned in Activity -1 .

### Activity 1: Create Supplier  Object:

To create an object:

1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
   1) Enter the label name→ **supplier**
   2) Plural label name→ supplier
   3) Enter Record Name Label and Format
      - Record Name → supplier  Name
      - Data Type → Text
2. Click on Allow reports and Track Field History and allow search
3. Allow search → **Save.**

### Activity 2: Create Rice mill Object:

To create an object:

1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
   1) Enter the label name→ rice mill
   2) Plural label name→ rice mills
   3) Enter Record Name Label and Format
      - Record Name →
      - Data Type → Auto Number
      - Display Format → rice-{000}
      - Starting number → 1
2. Click on Allow reports and Track Field History, Allow Search.
3. Allow search → **Save.**

### Activity 3: Create consumer  Objects:

**Note:** Follow the same steps as mentioned in Activity 2

1. Use these display format for the **consumer**
    - label name → **consumer**
    - Plural label name → **consumers**
    - Display Format → **consumers**-{000}
    - Starting number → 1

**Activity 4: Create rice details Objects:**

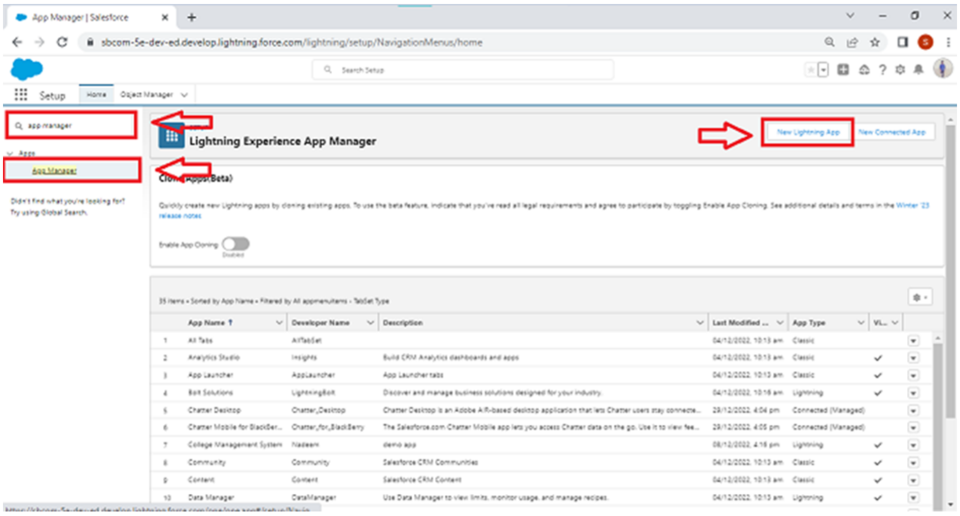
2. Use these display format for the rice details
    - label name → rice details
    - Plural label name → rice details
    - Display Format → rice-{000}
    - Starting number → 1

# MILESTONE 4 - THE LIGHTNING APP

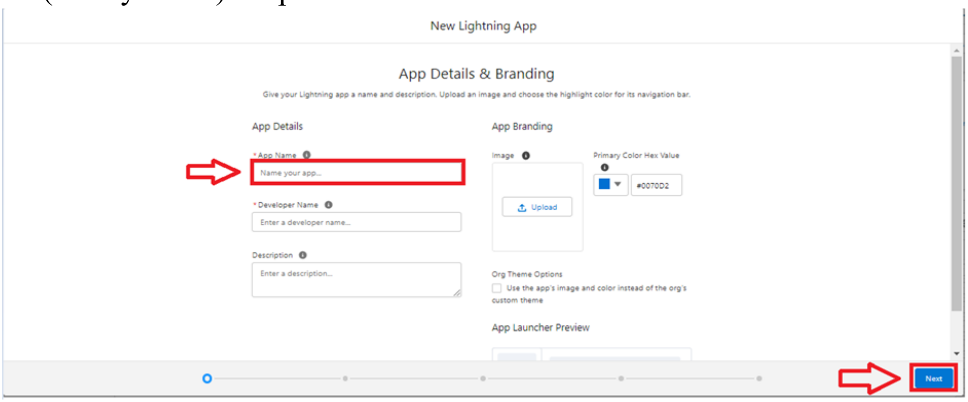
**Activity 1: Create a Lightning App**

**To create a lightning app page:**

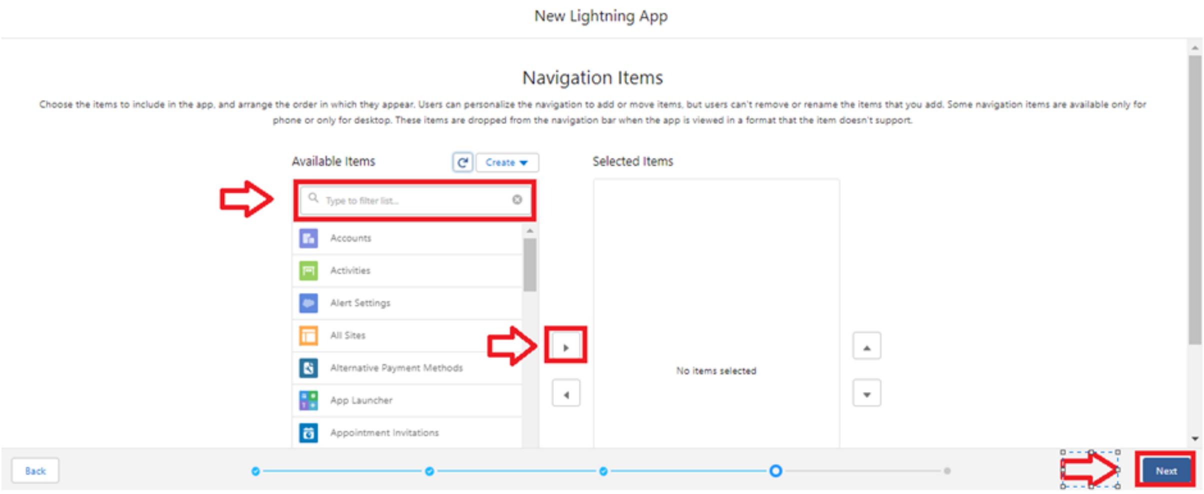
1. Go to setup page → search "app manager" in quick find → select "app manager" → click on New lightning App.




Fill the app name in app details as MY RICE →Next → (App option page) keep it as default → Next → (Utility Items) keep it as default → Next.

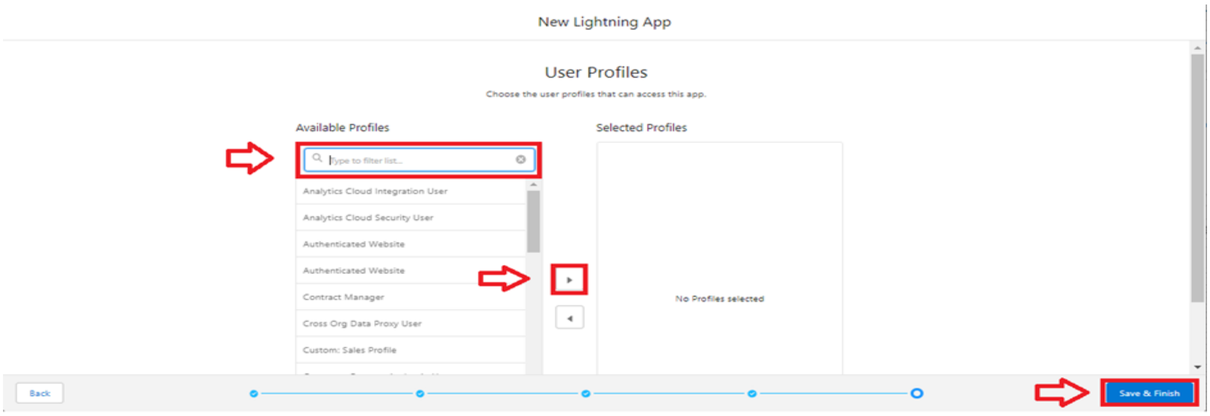


2. Upload a photo that is related to your app.
3. To Add Navigation Items:




Select the items (supplier, rice mill, consumer , Rice details ) from the search bar and move it using the arrow button → Next.

4. To Add User Profiles:



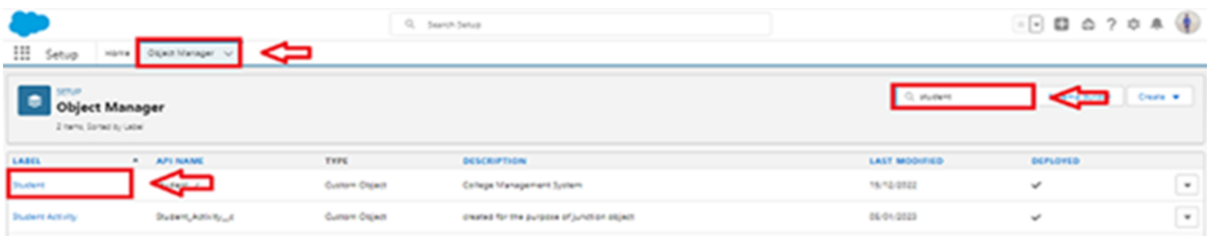

Search profiles (System administrator) in the search bar → click on the arrow button → save & finish.

# MILESTONE 5 - FIELDS

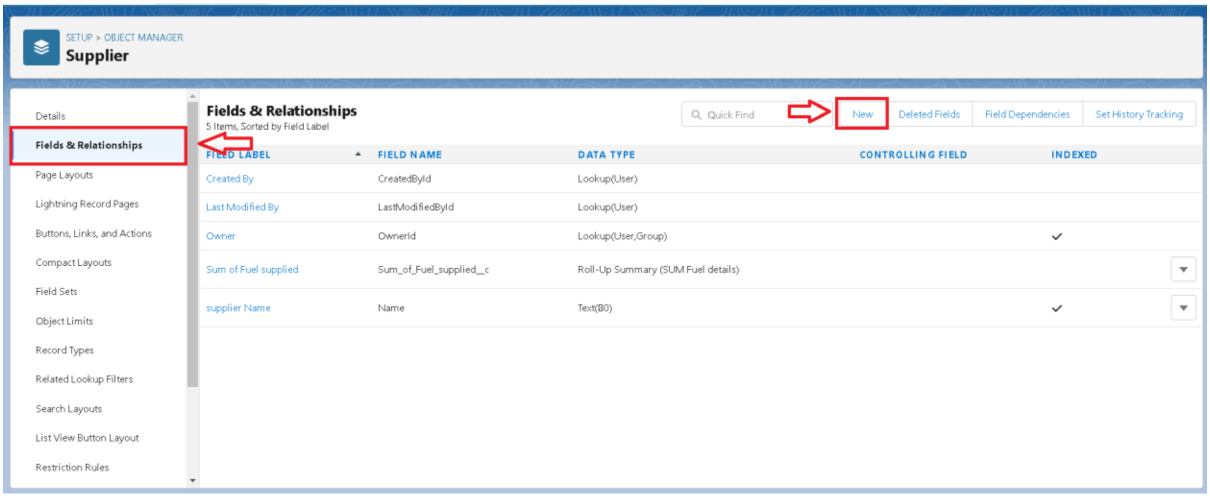
**Activity 1: Creating the number field in rice details object**

**Creating the number field in rice details object**

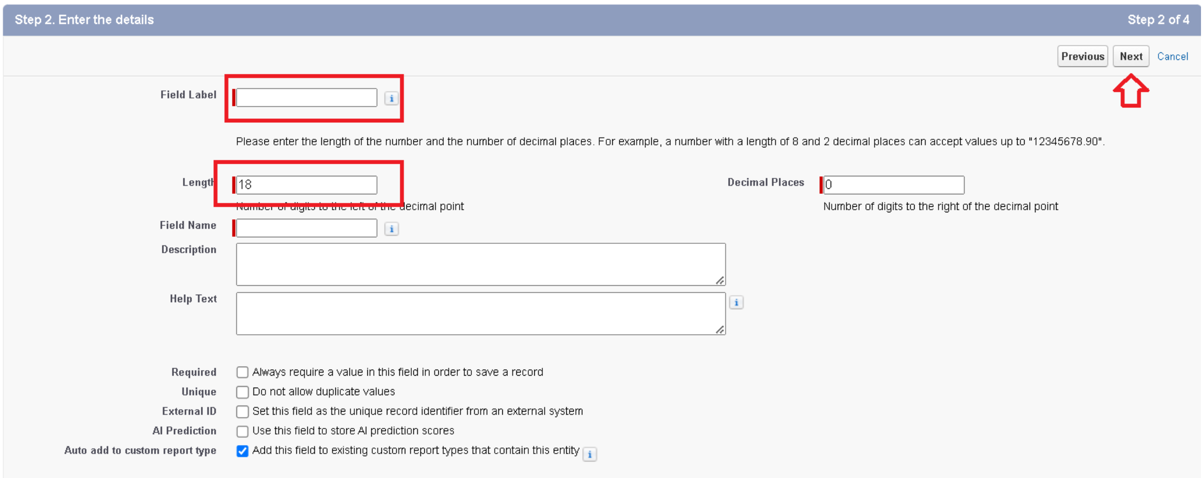
1. Go to the setup page → click on object manager → From drop down click edit for rice details object.




2. Click on fields & relationship → click on New.




3. Select Data type as “Number” and click Next.
4. Given the Field Label as “ rice distributed ” and length as “ 5 ”.




5. Field Name will be auto populated, and click on Next→ Next → Save.

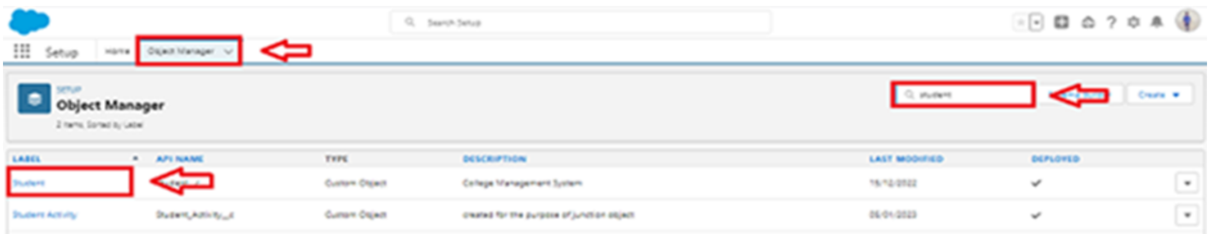
### Activity 2 : Creating Junction Object

A Junction  object is a custom object that serves as a bridge between two related objects in a  many-to-many relationship. It allows you to create a relationship between records of two different objects by creating a many-to-many relationship model.

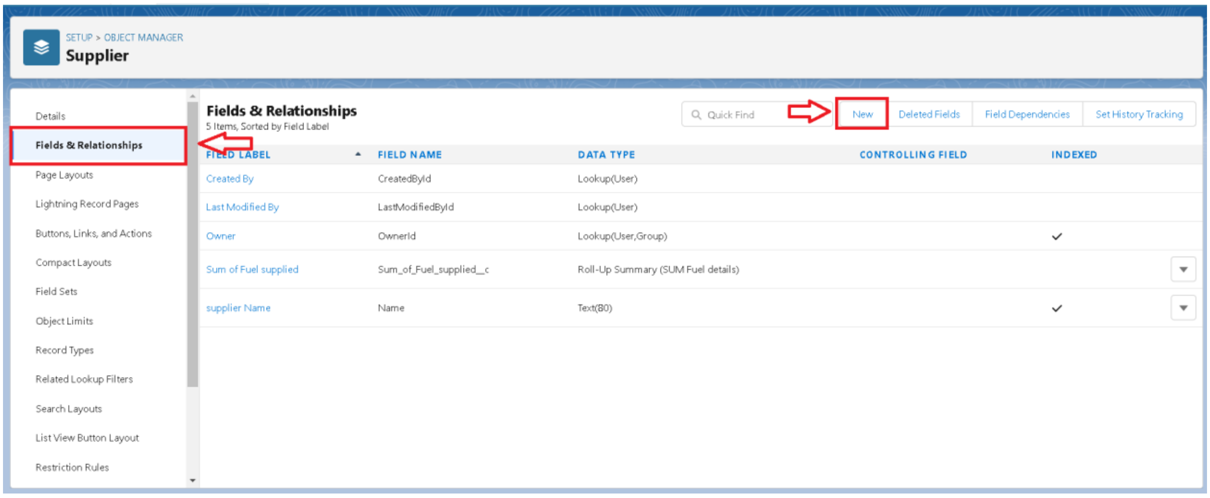
### Creating junction object as rice details with supplier & rice mill

To create junction object

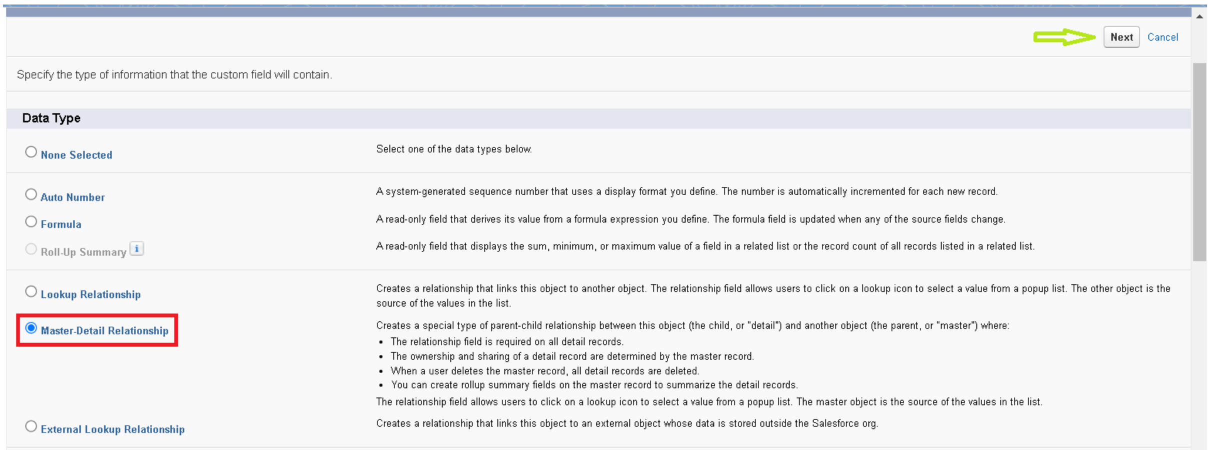
1. Go to the setup page → click on object manager → From drop down click edit for  rice details object.



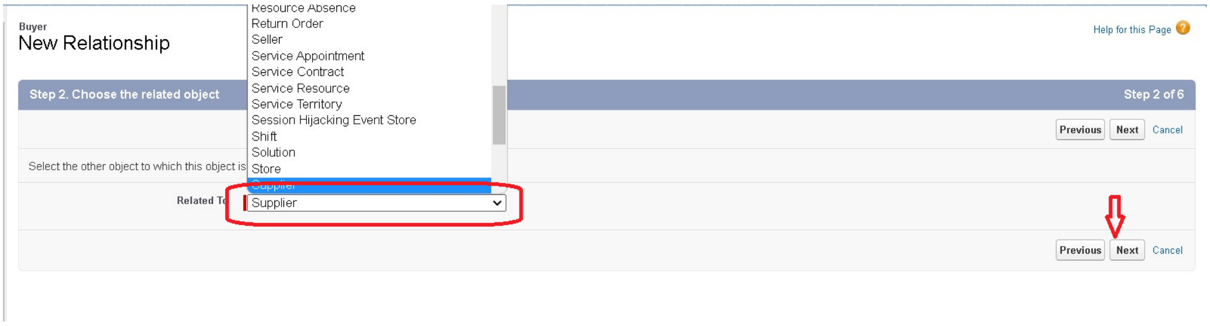

2. Click on fields & relationship → click on New.




3. Select “Master-Detail relationship” as data type and click Next.




4. Select the related object “ supplier ” and click next.




5. Give Field Label as “supplier Name” and click Next.
6. Next → Next → Save & New.
7. Follow the same steps from 1 to 3.
8. Select the related object “ rice mill ” and click Next.
9. Give Field Label as “rice mill 1(one)” and click Next.
10. Next → Next → Save.

### Activity 3 : Creating a Master-Detail Relationship

master-detail relationship is a type of relationship between two objects where the master object controls certain behaviors and settings of the detail object. Here are a few use cases that demonstrate the use of master-detail relationships

### Creating Master-Detail Relationship between consumer & rice mill Object

To Create a Master-Detail relationship

1. Go to the setup page → click on object manager → From drop down click edit for consumer object.

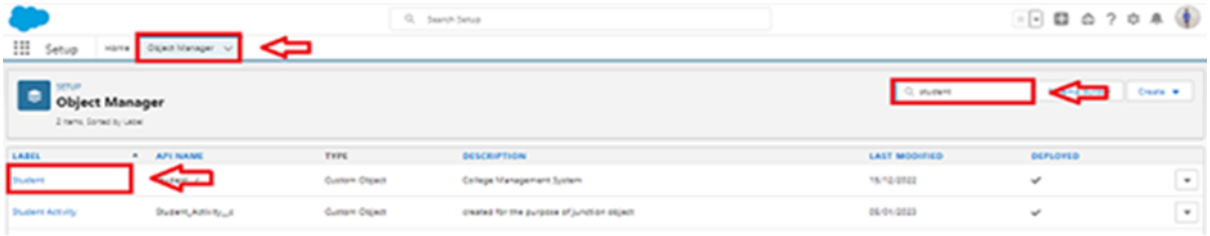
2. Click on fields & relationship → click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. Select the related object “ rice mill”.
5. Give Field Label as “rice mill name” and click Next.
6. Next → Next → Save.

### Activity 4 : Creating the Roll-up Summary

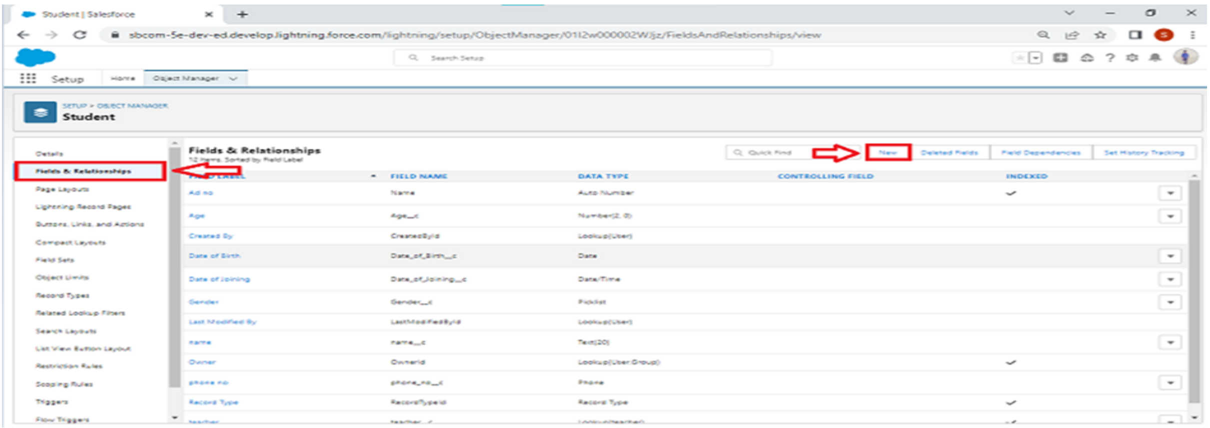
A rollup summary field is a field that summarizes data from a child object to a parent object that shares a master-detail relationship. Rollup summary fields can use the COUNT, SUM, MIN, and MAX functions. For example, you could use a rollup summary field to display the total value (amount of rice supplied ) from rice details on a related supplier.

### Creating the Roll-up summary field on supplier & rice mill Objects.

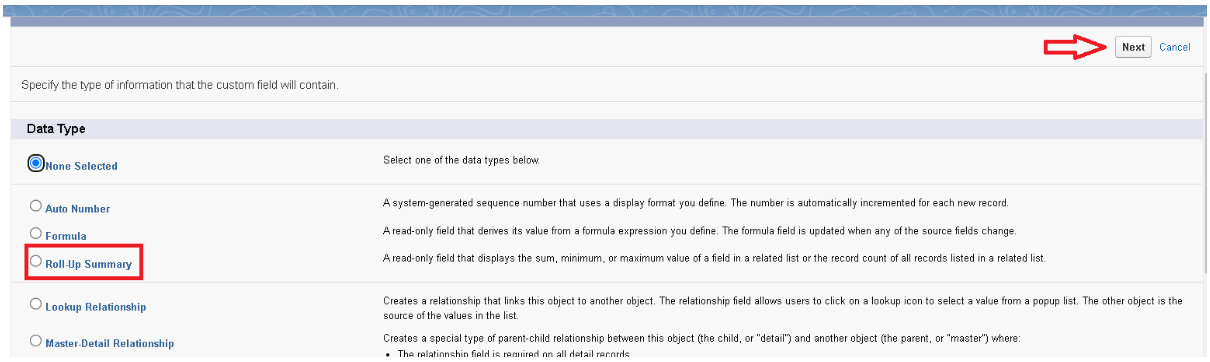
1. Go to setup → click on Object Manager → type object name(supplier) in search bar → click on the object.



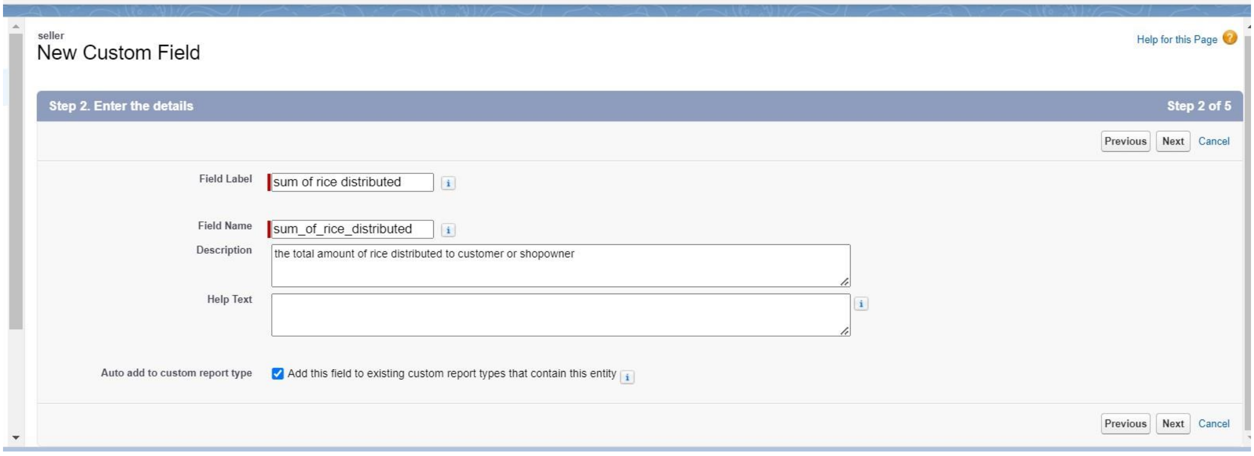

2. Now click on “Fields & Relationships” → New



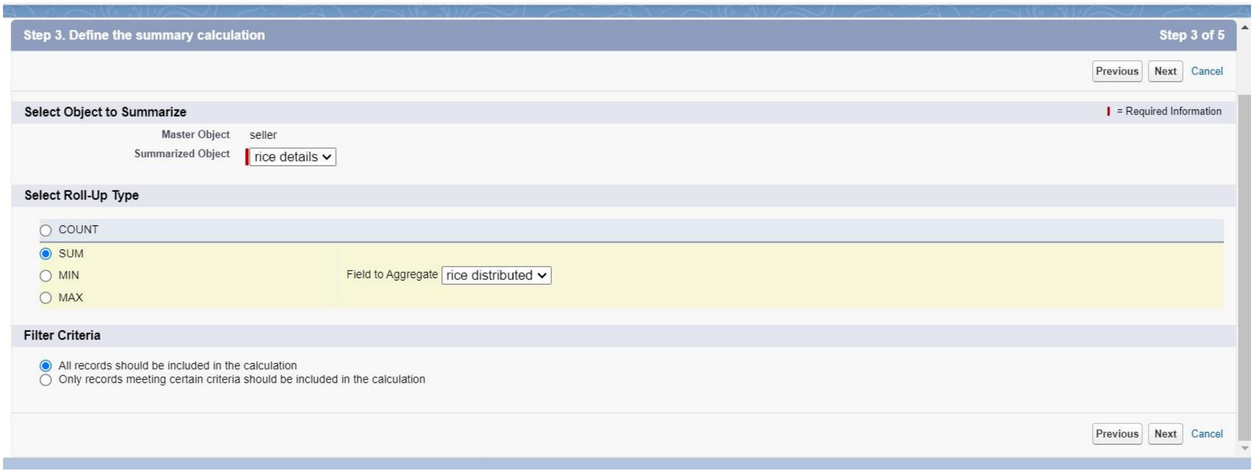

3. Select the data type as “Rollup summary ”,and click Next.




4. Give the Field label as “ sum of rice distributed ”,Field Name will be Auto generated, and click Next.

5. 


6. Select the summarized object as " rice details ".
7. Select the Rollup type as "sum".
8. Select the field to aggregate as " rice distributed ", and click Next → Next → Save.




9. Follow the same steps for the rice mill Object from 1 to 3
10. Give the Field label as " rice distributed to shops ",Field Name will be Auto generated, and click Next.
11. Select the summarized object as " rice details ".
12. Select the Rollup type as "sum".
13. Select the field to aggregate as " rice distributed ", and click Next → Next → Save.
14. **Note :** create the field as " rice taken by shops in kgs" using number datatype in consumer object
15. Follow the same steps for the rice mill Object from 1 to 3
16. Give the Field label as " rice taken ",Field Name will be Auto generated, and click Next.
17. Select the summarized object as " consumer".
18. Select the Rollup type as "sum".
19. Select the field to aggregate as " rice taken in shops ", and click Next → Next → Save.

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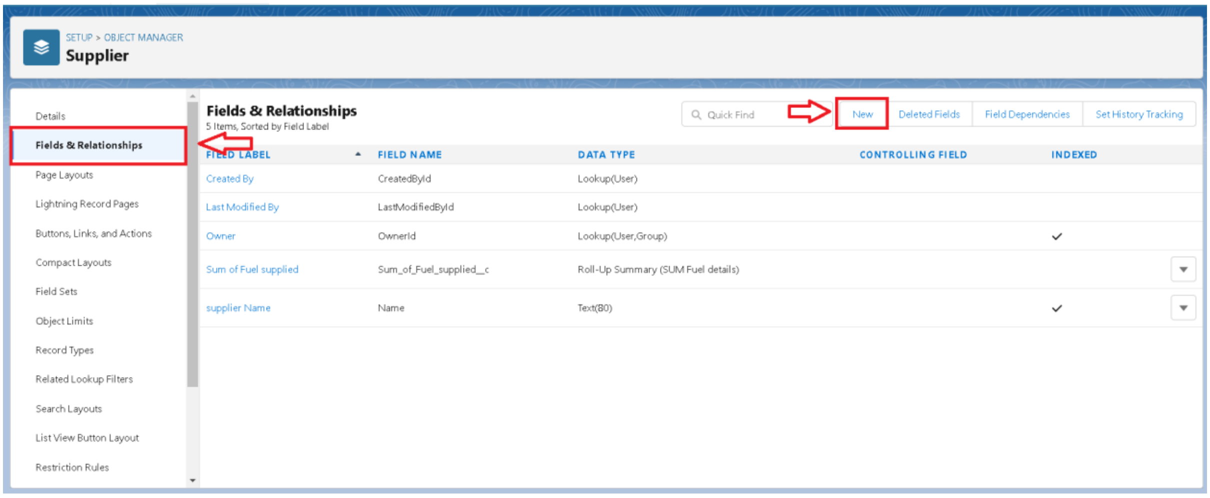
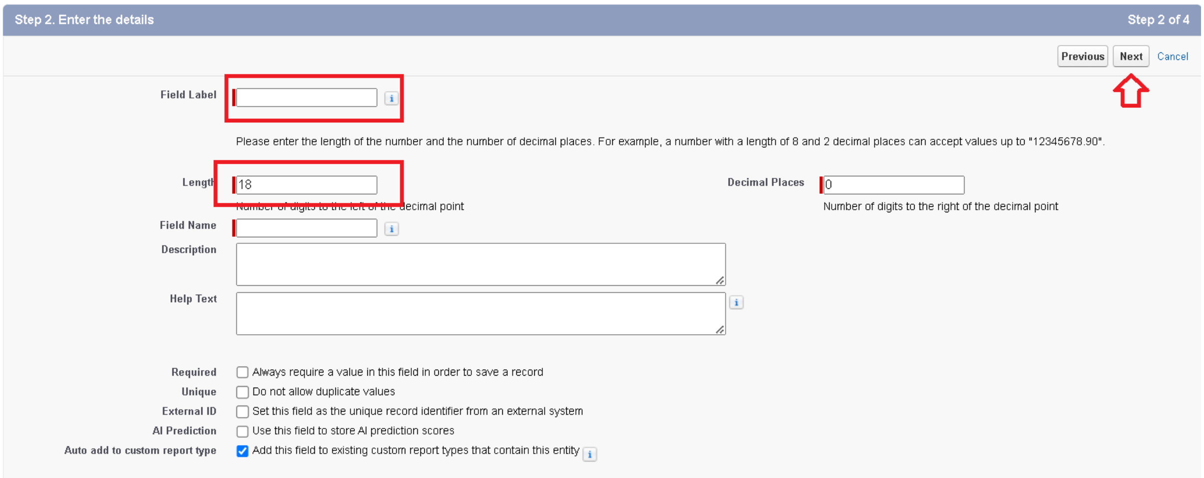
**Activity 5 : Creating Fields in Objects**

**Creating the number field in rice details object**

6. Go to the setup page → click on object manager → From drop down click edit for rice details object.
7. Click on fields & relationship → click on New.




8. Select Data type as "Number" and click Next.
9. Given the Field Label as " supplier  name " and length as " 5 ".




10. Field Name will be auto populated, and click on Next→ Next → Save.

## Activity 6: Creating  Fields in rice mill Objects

1. Select Data type as "Number" and click Next.
2. Given the Field Label as " rice price/kg " and length as " 5 "

## Activity 7: Creating  Fields in consumer Objects

| S.no | Object name | Fields | data type |
|---|---|---|---|
| 1. | consumer | First name | Text |
| | | Last name | Text |

| | | | |
|---|---|---|---|
| | | Phone number | phone |
| | | email | email |
| | | Rice taken by shops | Number (length=5) |
| | | Rice type | (Picklist values)<br>1.basmati<br>2.normal rice |
| | | Mode of payment | Picklist values<br>● Credit card<br>● Debit card<br>● Net banking<br>● UPI<br>● Cash |

**Activity 8 : Creating Cross Object Formula Field in consumer Object**

A cross-object formula field is a formula field that references fields from another object in Salesforce. This type of formula allows users to calculate and display data from multiple objects on a single record.

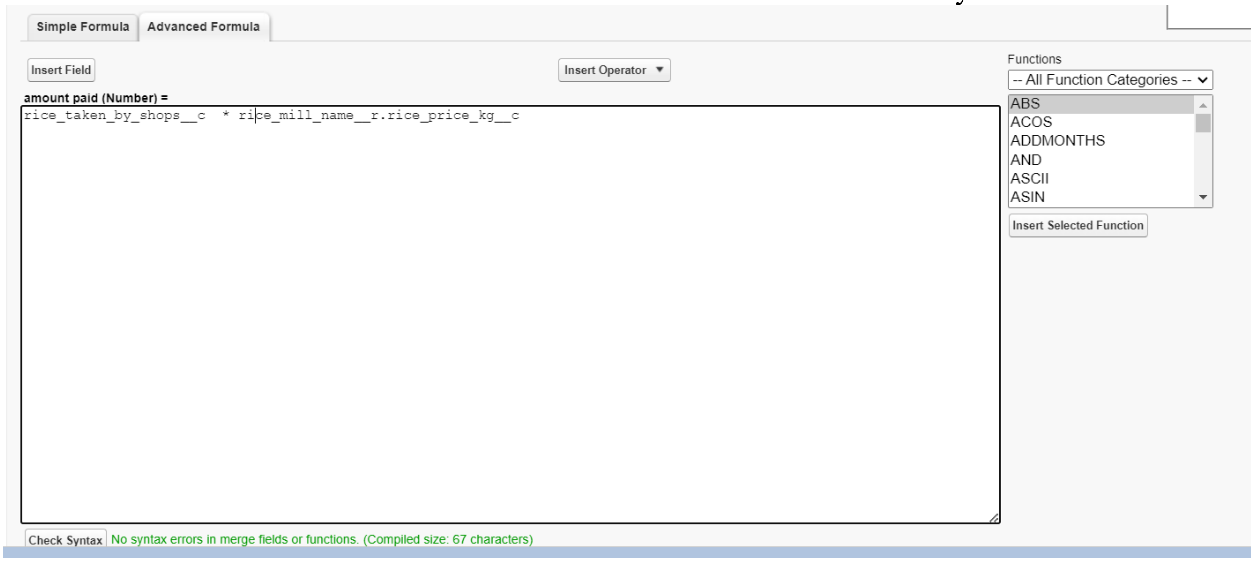
**Note :** check whether the fields mentioned in the formula field are created or not , if not go to activity 9 and create those fields mentioned in consumer object.

1. Go to setup → click on Object Manager → type object name(consumer) in search bar → click on the object.
2. Click on fields & relationship → click on New.
3. Select Data type as “Formula” and click Next.
4. Give Field Label and Field Name as “Amount Paid ” and select formula return type as “Number” and click next.


5. Insert fields formula should be :

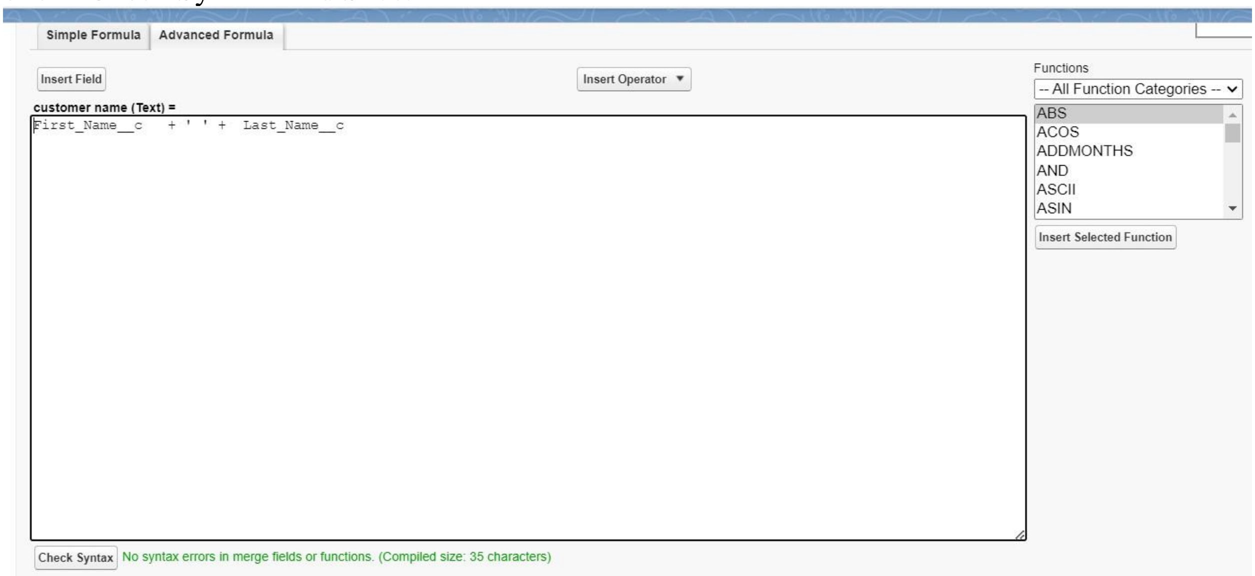
    rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c

6. Under Advanced Formula write down the formula and click “Check Syntax” and Save.




1. **Creating the Formula field in consumer Object**

**Note :** check whether that the fields that mentioned in the formula field are created are not , if not go to activity 9 and create that fields mentioned in consumer object

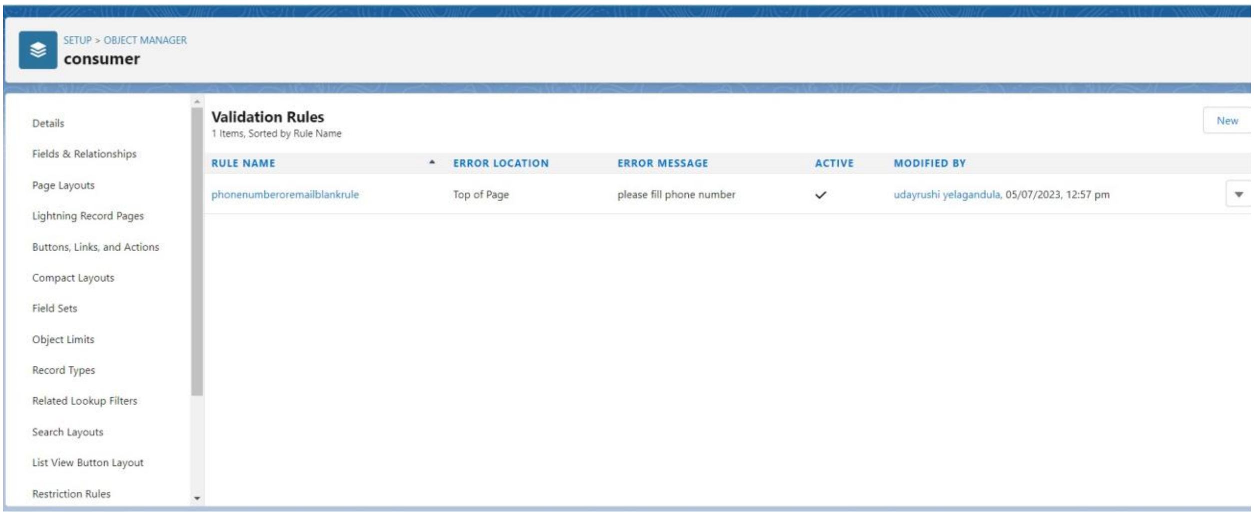
2. Go to setup → click on Object Manager → type object name(consumer) in search bar → click on the object.
3. Click on fields & relationship → click on New.
4. Select Data type as “Formula” and click Next.
5. Give Field Label and Field Name as “Consumer Name” and select formula return type as “TEXT” and click next.
6. Insert field formula should be : First_Name__c + ' ' + Last_Name__c
7. click “Check Syntax” and Save.
8. 


**Activity 9 : Creating the validation rule**

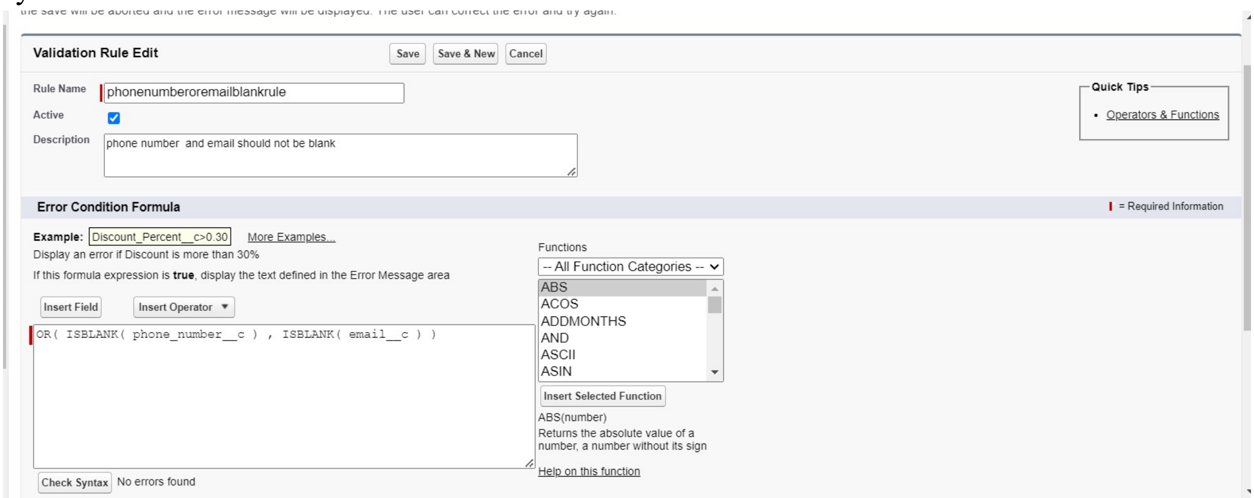
**Creating the validation rule for phone number field in consumer object**

**Note :** check whether the fields mentioned in the formula field are created or not , if not go to activity 9 and create those fields mentioned in consumer object.

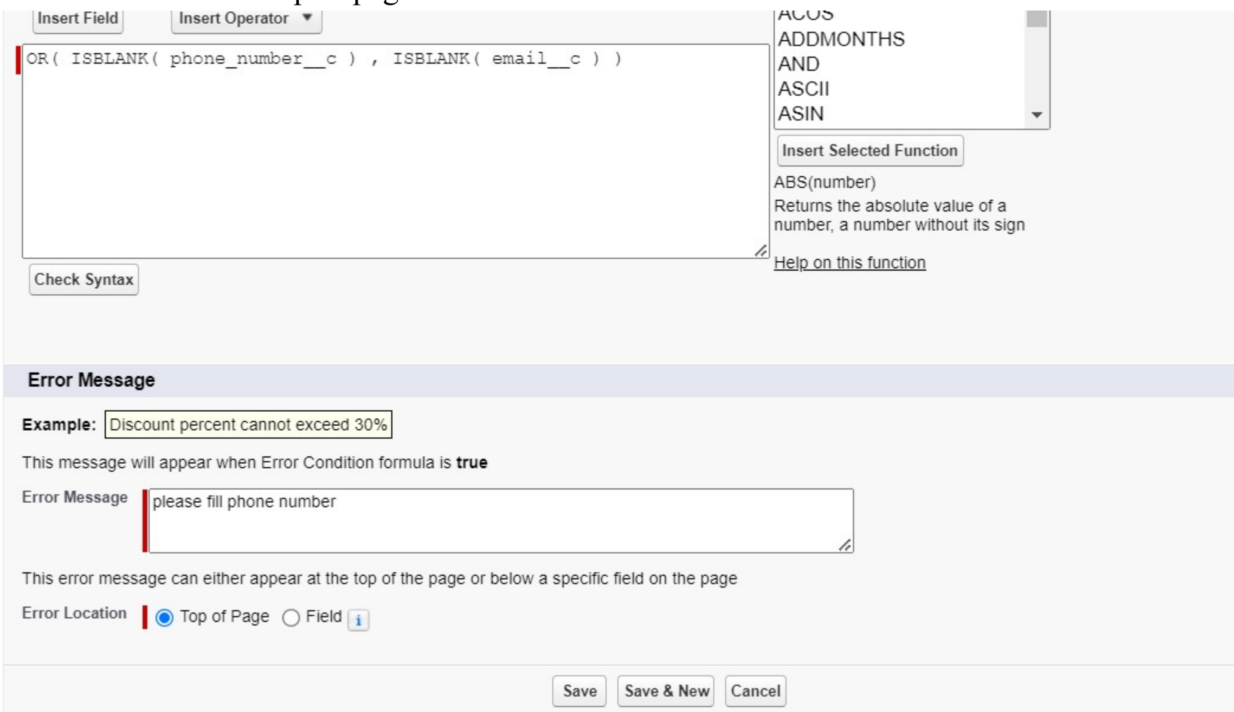
1. Go to the setup page → click on object manager → From drop down click edit for consumer object.
2. Click on the validation rule → click New.




3. Enter the Rule name as "Phonenumberoremailblankrule ".
4. Enter the description as "phone number and email number should not be blank".
5. Enter the formula as "OR( ISBLANK( phone_number__c ) , ISBLANK( email__c ) )" and check the syntax.

6.



7. Under the error message write as"please fill in your phone number."
8. Select error location "top of page".

9.


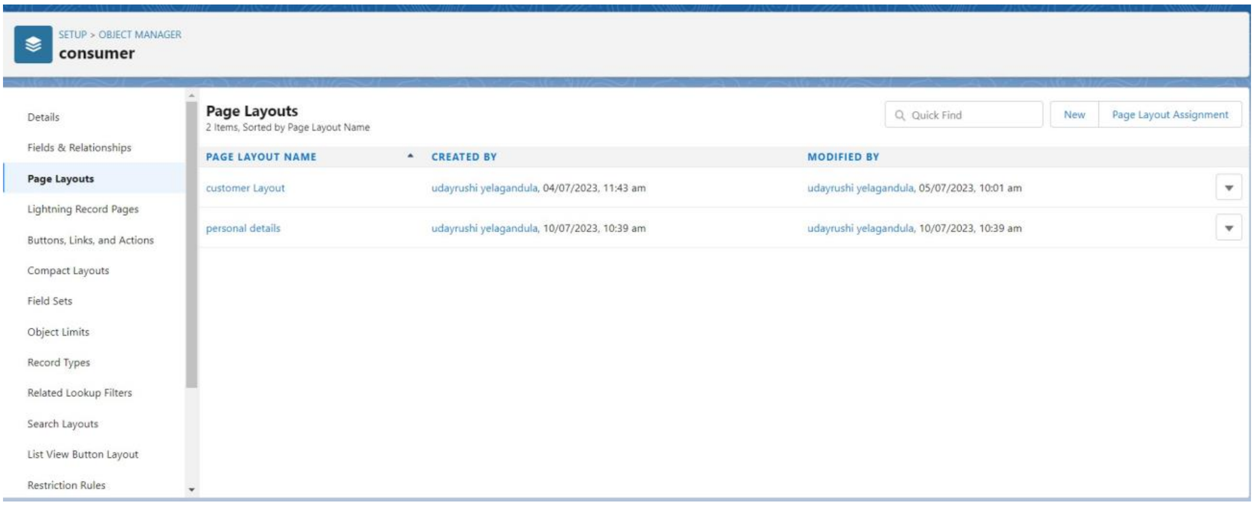

10. Save the validation rule.

# MILESTONE 6 - PAGE LAYOUTS

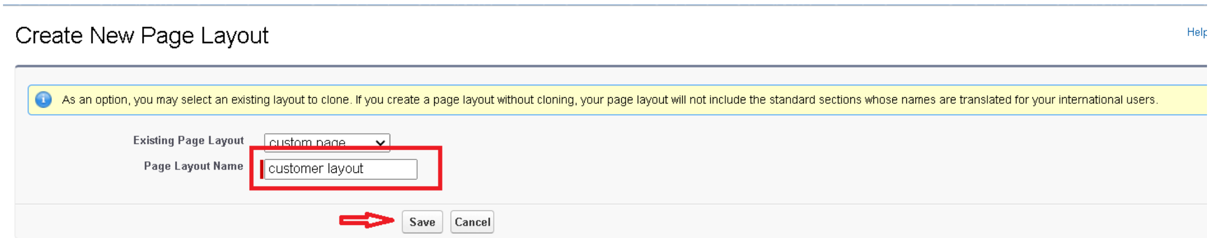
### Activity 1 : creating the page layout

### To Create a Page layout:

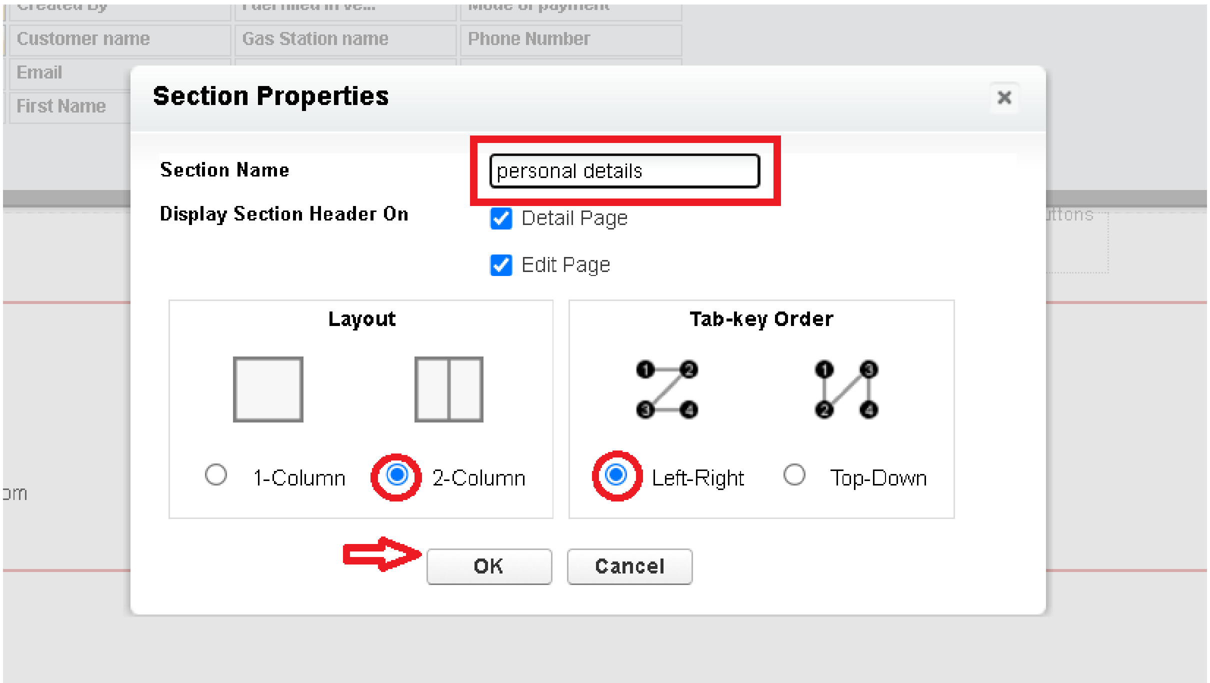
1. Go to Setup → Click on Object Manager → Search for the object (consumer) → From drop down select the object and click on it.
2. Click on Page layout → Click on New.



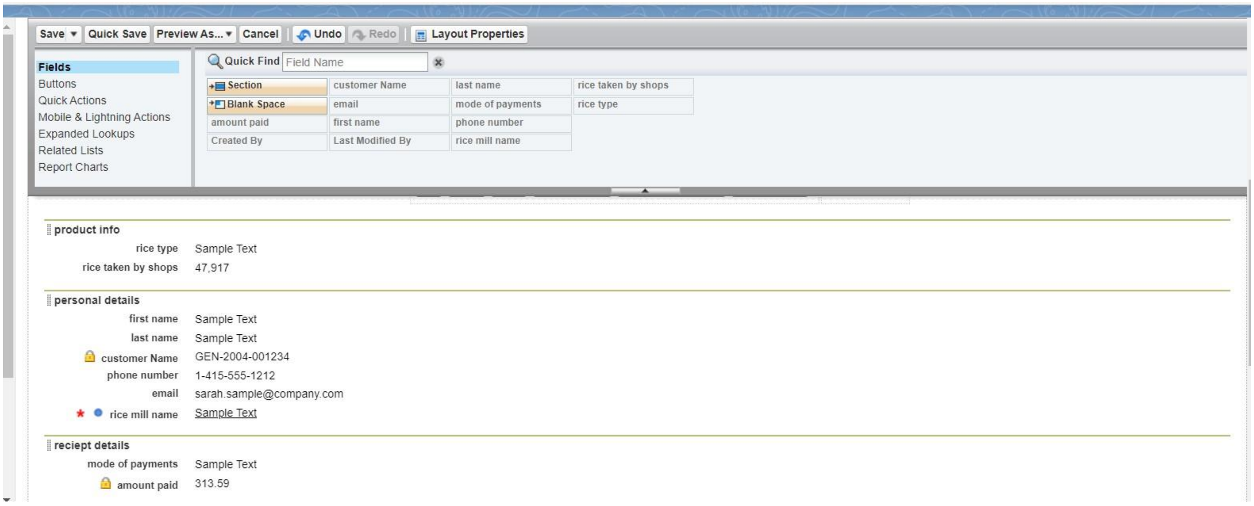

3. Select the existing page layout, and give the page layout name as “consumer layout”, and click save.




4. Drag and drop the section field to consumer details and create the section.
5. Enter the section name as “Personal details”, → click Ok.



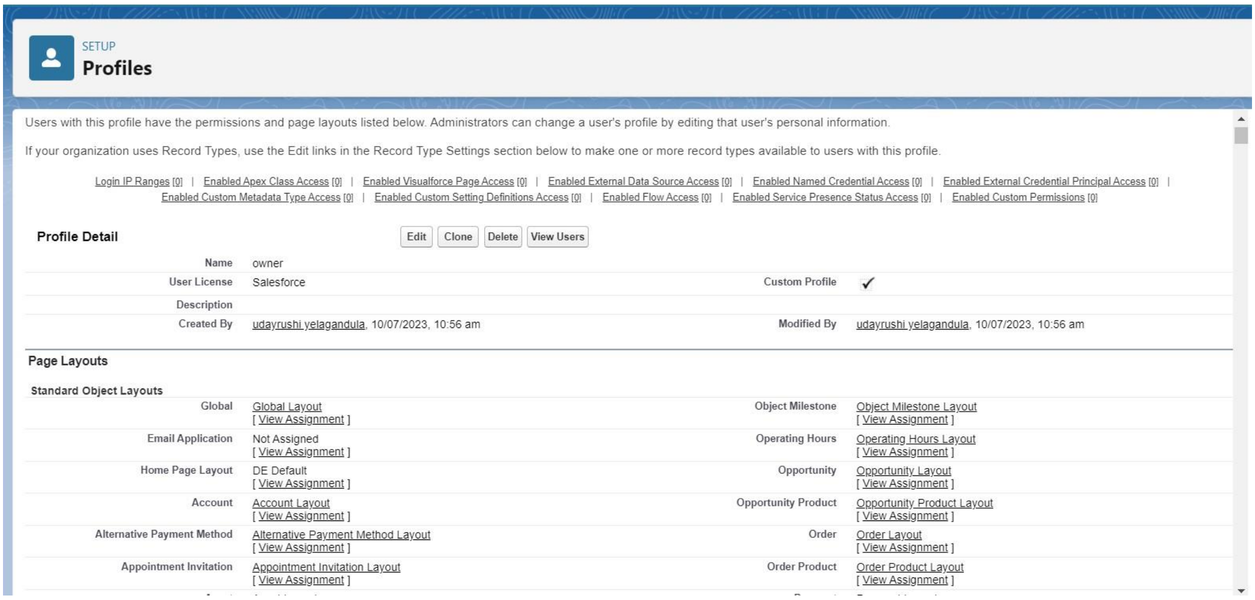

6. Now drag the fields to this section that mentioned , they are
   - First name , last name , consumer name , phone number, email, rice mill name.

7. Follow the same process for another two sections as shown above , they are
8. One section is “ rice details ” , drag the fields that are
    - Rice taken by shop, rice type.
9. Another section is “Receipt details ”, and drag the fields that are
    - Mode of payment , Amount paid.
10. Then , Click save.
11. 

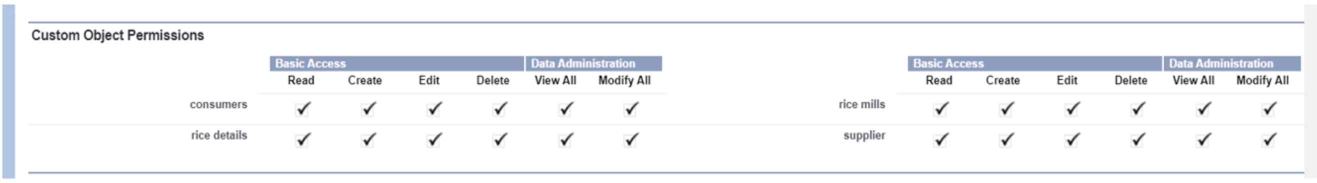

# MILESTONE 7 - PROFILES

## Activity 1: owner Profile

## To create a new profile:

1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (Standard User) → enter profile name (owner) → Save.
2. 


3. Scroll down to Custom Object Permissions and Give access permissions for consumers, rice details , rice mill and suppliers objects as mentioned in the below diagram.

4. 

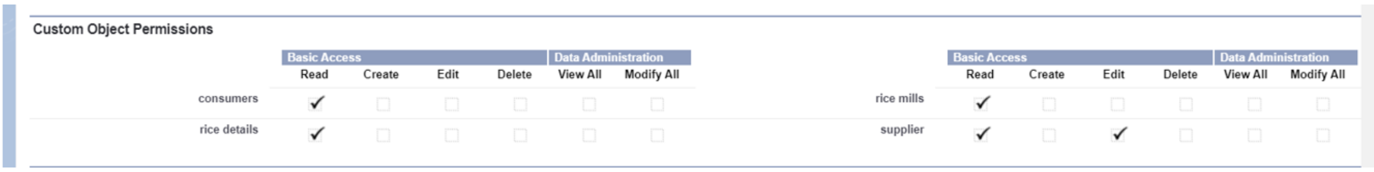
Custom Object Permissions

| | Basic Access | | | | Data Administration | |
|---|---|---|---|---|---|---|
| | Read | Create | Edit | Delete | View All | Modify All |
| consumers | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| rice details | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| rice mills | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| supplier | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |

5. Give access and save it.

### Activity 2: employer Profile

1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (Standard Platform User) → enter profile name (employer) → Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the rice mill..
4. Scroll down to Custom Object Permissions and Give access permissions for consumer, rice details , rice mill  and suppliers  objects as mentioned in the below diagram.



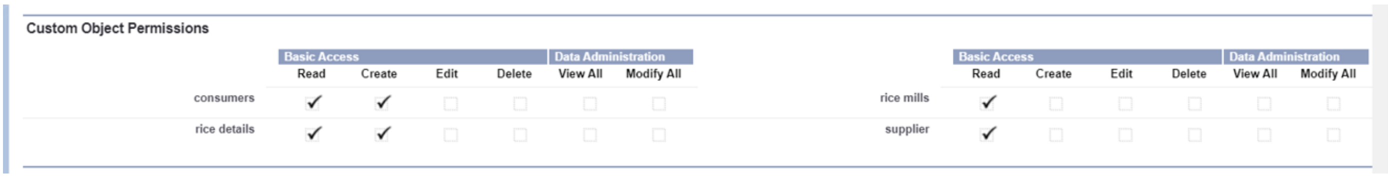
Custom Object Permissions

| | Basic Access | | | | Data Administration | |
|---|---|---|---|---|---|---|
| | Read | Create | Edit | Delete | View All | Modify All |
| consumers | ✓ | | | | | |
| rice details | ✓ | | | | | |
| rice mills | ✓ | | | | | |
| supplier | ✓ | | ✓ | | | |

5. And click save.

### Activity 3: worker Profile

1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (Standard Platform User) → enter profile name (worker) → Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the rice mill.
4. Scroll down to Custom Object Permissions and Give access permissions for consumer, rice details , rice mill  and suppliers objects as mentioned in the below diagram.



Custom Object Permissions

| | Basic Access | | | | Data Administration | |
|---|---|---|---|---|---|---|
| | Read | Create | Edit | Delete | View All | Modify All |
| consumers | ✓ | ✓ | | | | |
| rice details | ✓ | ✓ | | | | |
| rice mills | ✓ | | | | | |
| supplier | ✓ | | | | | |

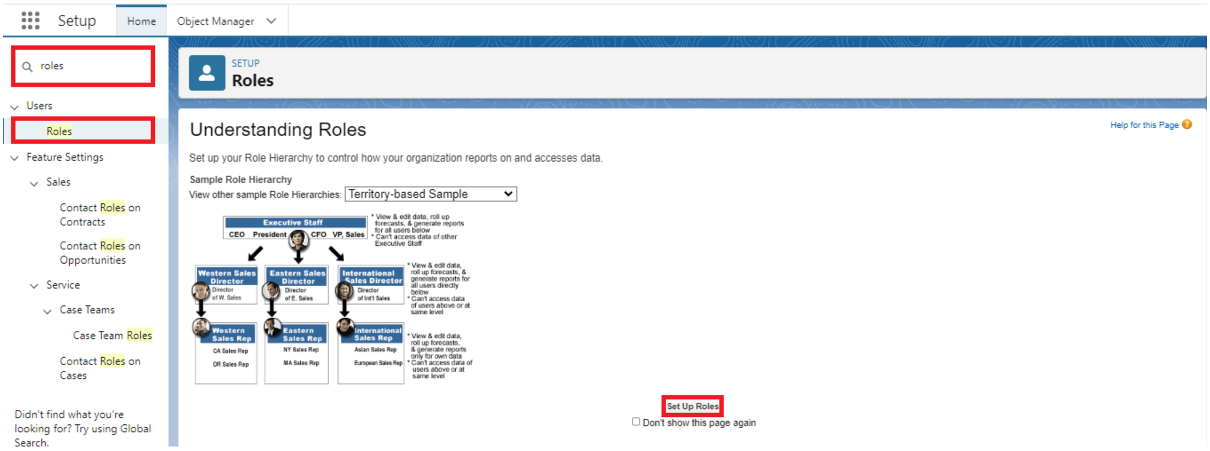
5. And click save.

# MILESTONE 8 - ROLE & ROLE HIERARCHY

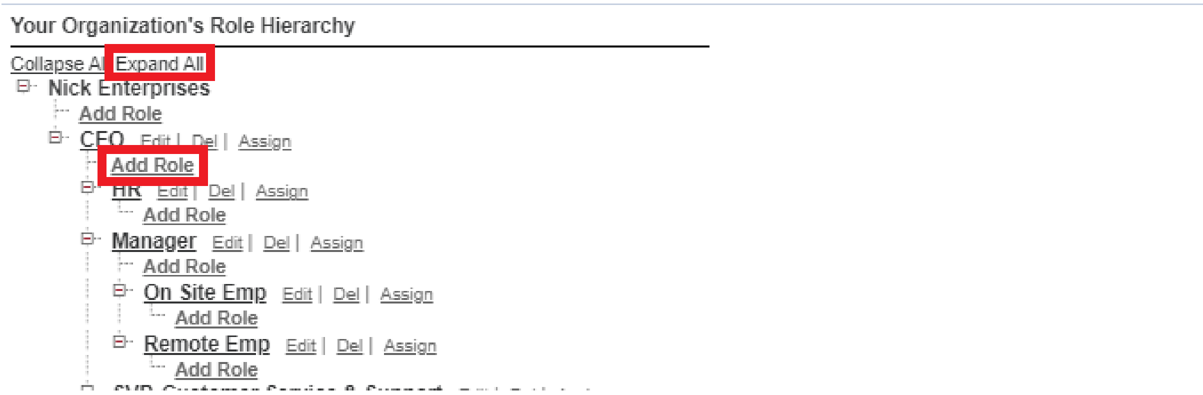
## Activity 1: Creating owner Role

Creating owner Role:

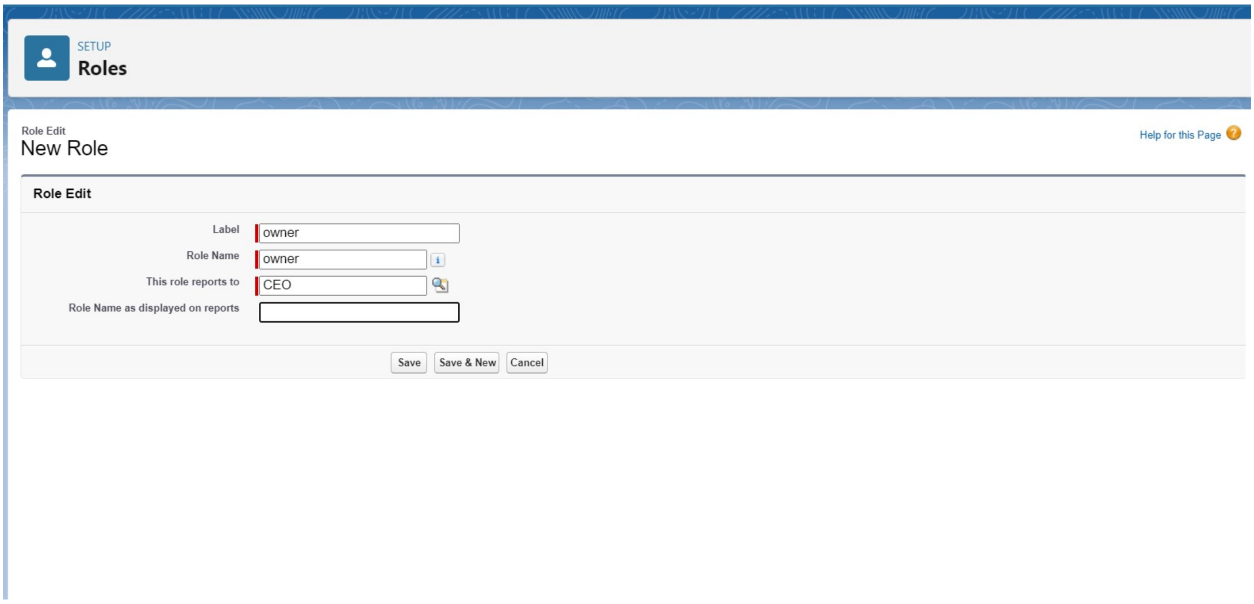
1. Go to quick find → Search for Roles → click on set up roles.




2. Click on Expand All and click on add role under whom this role works.




Give Label as "owner" and Role name gets auto populated. Then click on Save.

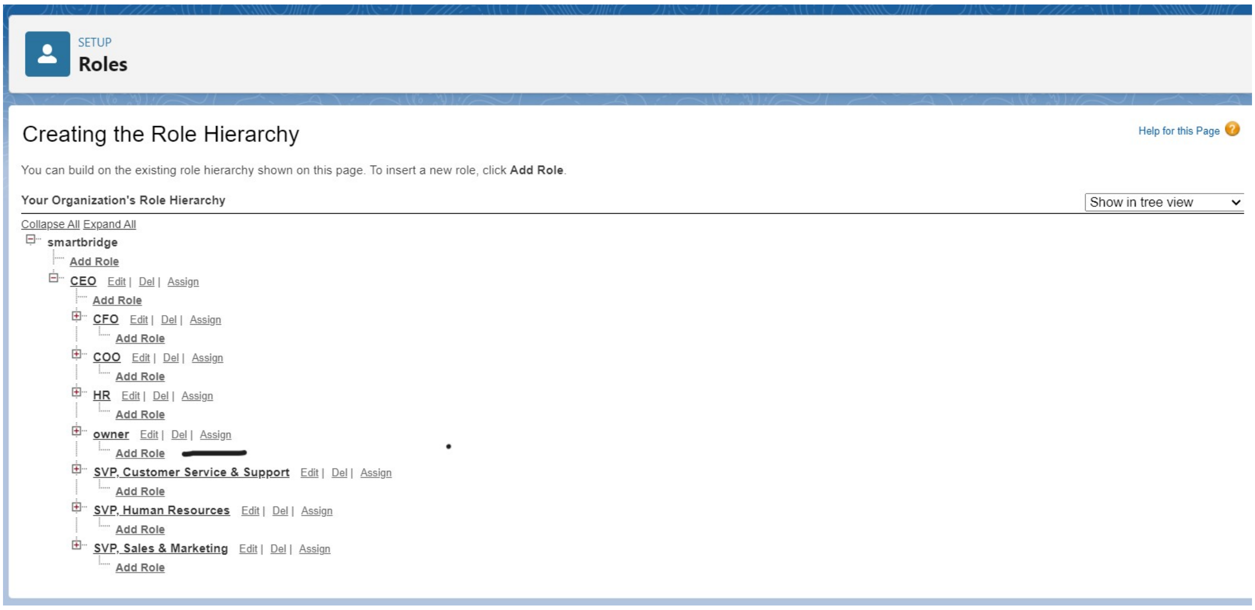



Click and save it.

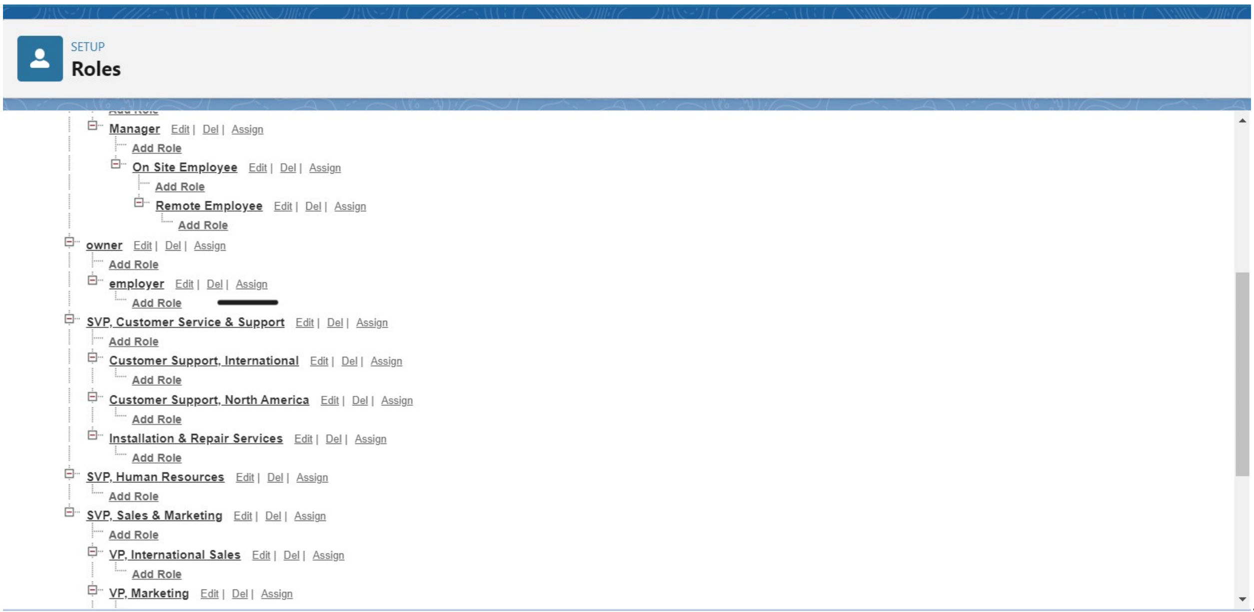
## Activity 2: Creating employer roles

Creating another two roles under manager

1. Go to quick find → Search for Roles → click on set up roles.
2. Click plus on CEO role, and click add role under owner.

3. 


4. Give Label as “employer” and Role name gets auto populated. Then click on Save.
   5. Repeat the same steps, for another role.
   6. Click plus on CEO role, and click plus on owner, and click add role under employer

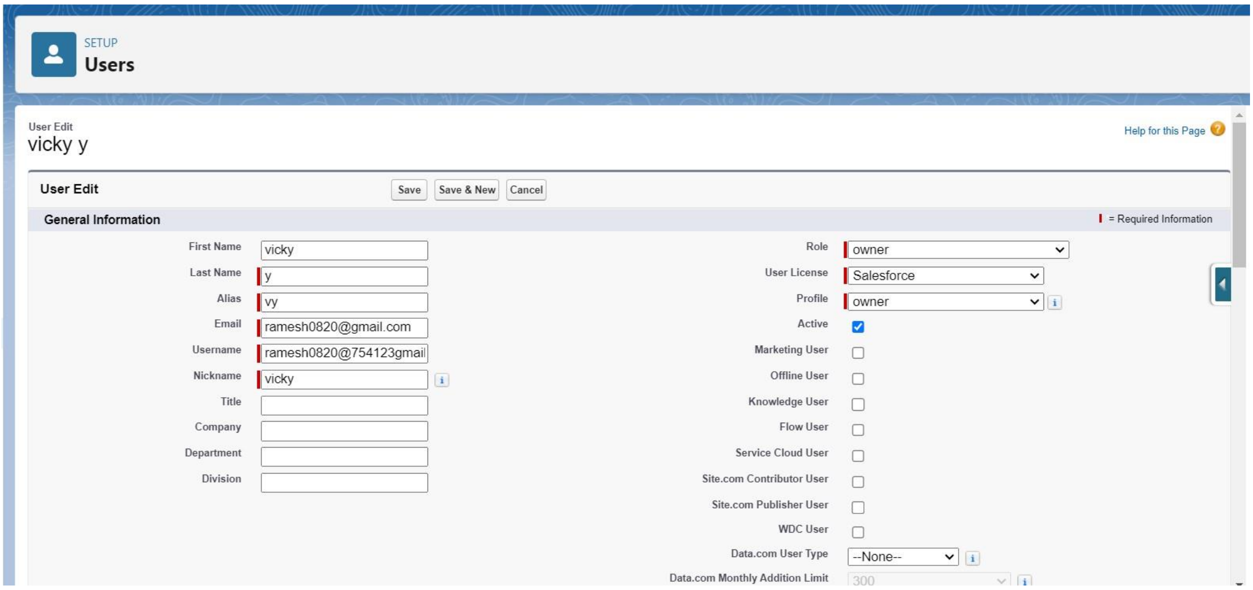



   7. give Label as “worker” and Role name gets auto populated. Then click on Save.

# MILESTONE 9 – USERS

## Activity 1: Create User

1. Go to setup → type users in quick find box → select users → click New user.
2. Fill in the fields
3. First Name : Vicky
4. Last Name : y
5. Alias : Give a Alias Name
6. Email id : Give your Personal Email id
7. Username : Username should be in this form: text@text.text
8. Nick Name : Give a Nickname
9. Role : owner
10. User license : Salesforce
11. Profiles : owner.

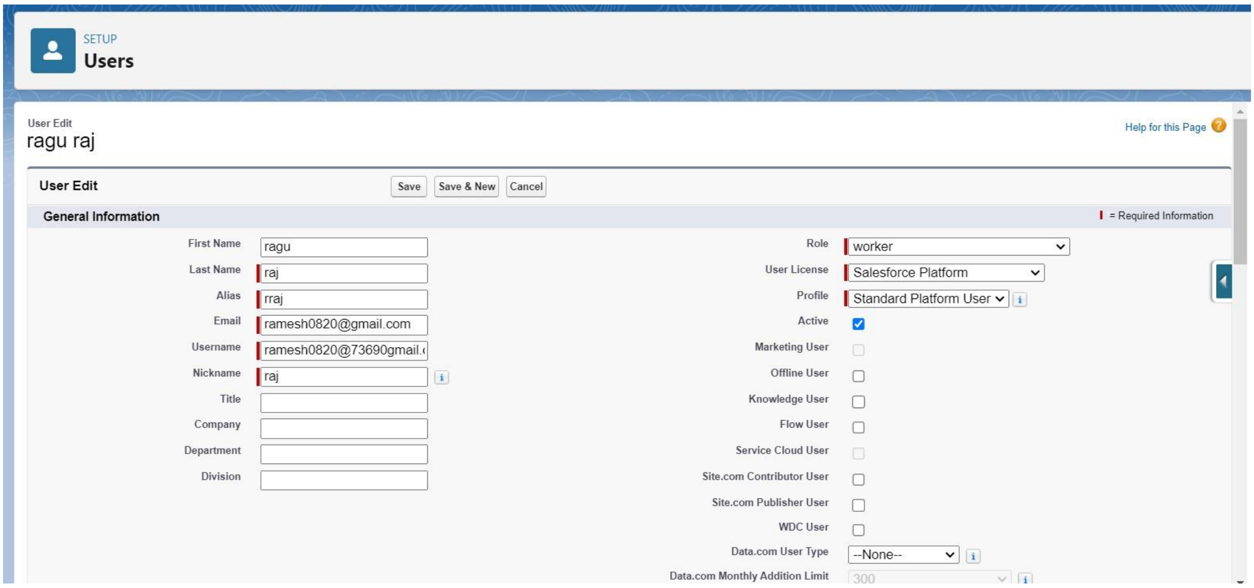



Save it.

## Activity 2: creating another users

12. Go to setup → type users in quick find box → select users → click New user.
13. Fill in the fields
    14. First Name : ram
    15. Last Name : ram
    16. Alias : Give a Alias Name
    17. Email id : Give your Personal Email id
    18. Username : Username should be in this form: text@text.text
    19. Nick Name : Give a Nickname
    20. Role : employer
    21. User license : Salesforce platform
    22. Profiles : standard platform user.

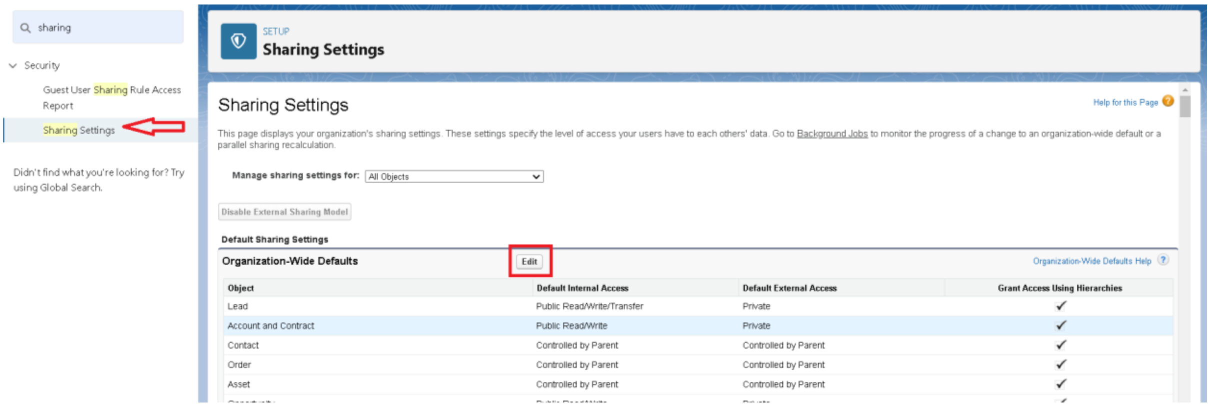
23. Go to setup → type users in quick find box → select users → click New user.
24. Fill in the fields
    25. First Name : ragu
    26. Last Name : raj
    27. Alias : Give a Alias Name
    28. Email id : Give your Personal Email id
    29. Username : Username should be in this form: text@text.text
    30. Nick Name : Give a Nickname
    31. Role : worker
    32. User license : Salesforce platform
    33. Profiles : standard platform user.




# MILESTONE 10 - PERMISSION SETS

## Activity 1: Creating OWD setting.

1. Go to setup → type “sharing settings ” in quick search → Click edit.



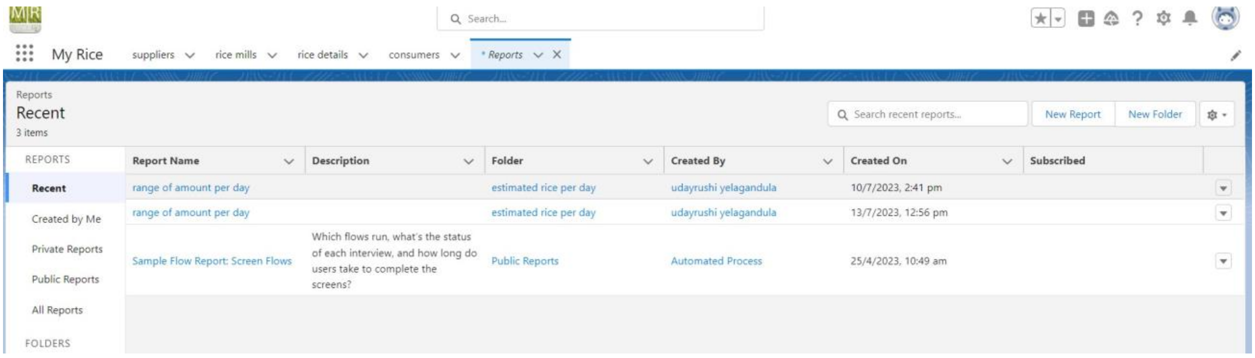

2. Scroll down, change the default internal access to “ public read-only” for rice mill and supplier object.
3. Click save.
4. Extra information, By these every profile has their own access, according to their profile.
5. But in our case we created roles and given the roles in such a way that the owner can see employer and worker records , and the employer can see the worker records.

**Note : create the latest “10” records in consumer objects. Try to fill every field in each record for better experience.**

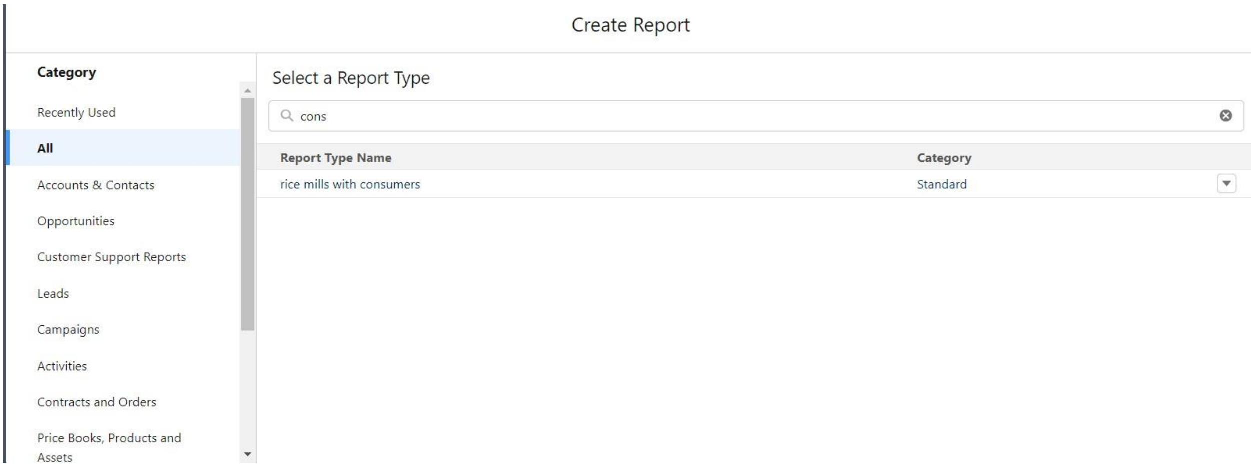
# MILESTONE 11 - REPORTS

## Activity 1: Create Report

1. Go to the app → click on the reports tab
2. Click New Report.




3. select for report type, search for "rice mill with consumers" click on it. And click on start report.




1. Their outline pane is opened already, select the fields that are mentioned below in the column section.

   1.consumer name

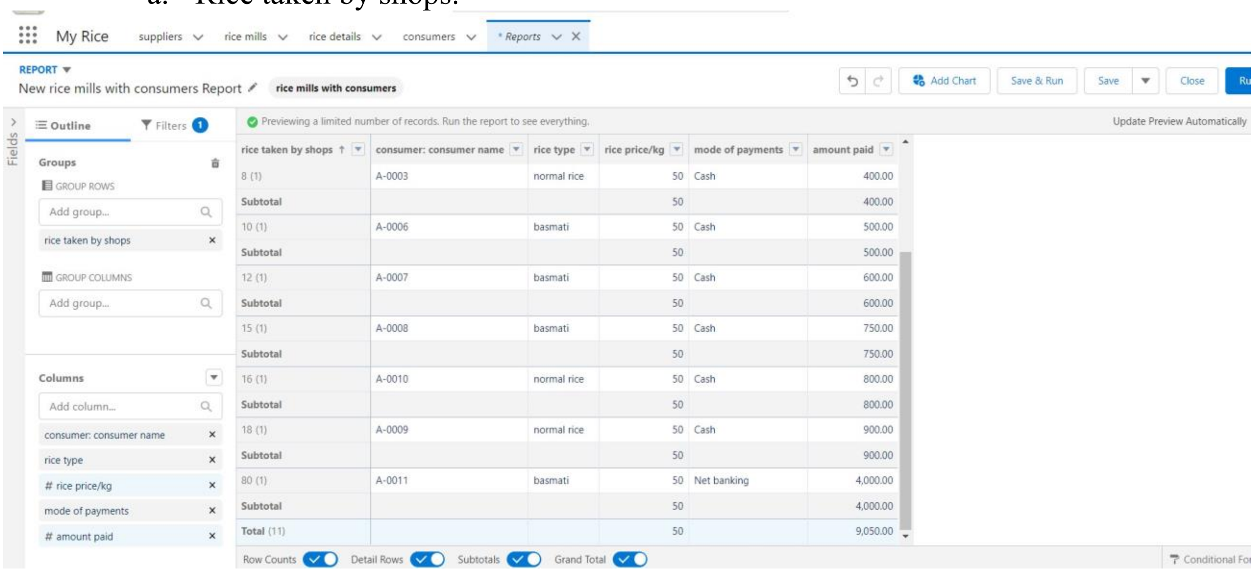
   2.rice type

   3.rice price/kg

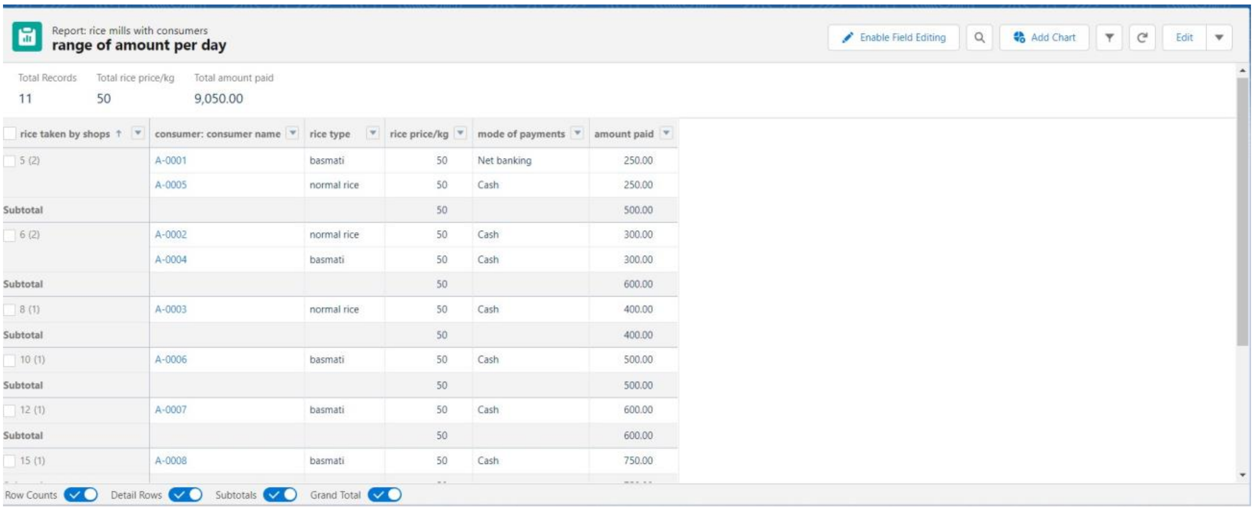
   4.mode of payments

   5.amount paid

2. Remove the unnecessary fields.
3. Select the fields that are mentioned below in the GROUP ROWS section.
   a. Rice taken by shops.



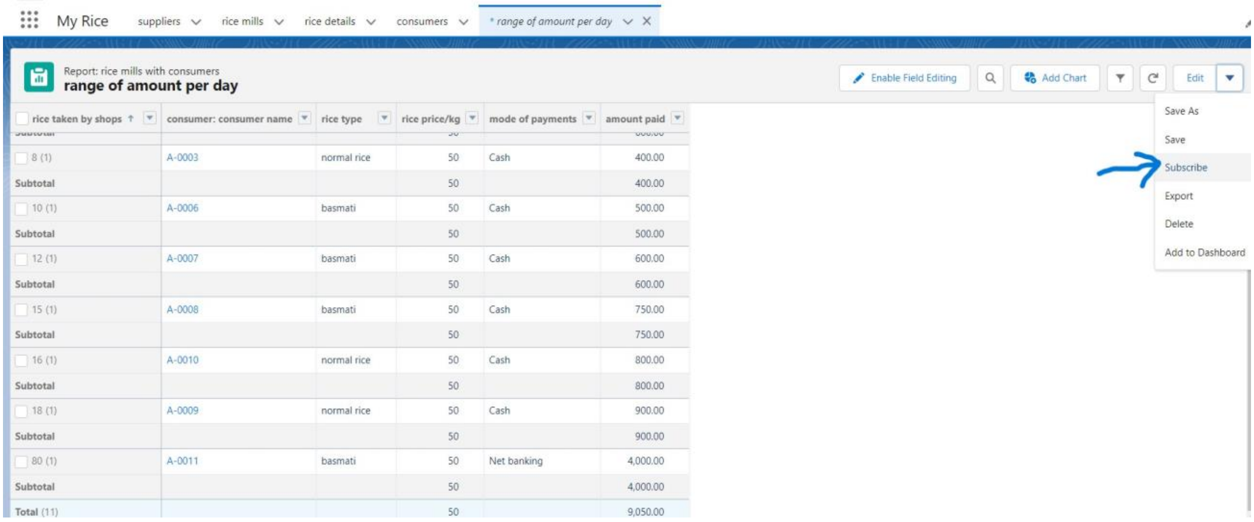

Click save and run and save the report as "range of amount per day".and save it.




| rice taken by shops | consumer: consumer name | rice type | rice price/kg | mode of payments | amount paid |
|---|---|---|---|---|---|
| 5 (2) | A-0001 | basmati | 50 | Net banking | 250.00 |
| | A-0005 | normal rice | 50 | Cash | 250.00 |
| Subtotal | | | 50 | | 500.00 |
| 6 (2) | A-0002 | normal rice | 50 | Cash | 300.00 |
| | A-0004 | basmati | 50 | Cash | 300.00 |
| Subtotal | | | 50 | | 600.00 |
| 8 (1) | A-0003 | normal rice | 50 | Cash | 400.00 |
| Subtotal | | | 50 | | 400.00 |
| 10 (1) | A-0006 | basmati | 50 | Cash | 500.00 |
| Subtotal | | | 50 | | 500.00 |
| 12 (1) | A-0007 | basmati | 50 | Cash | 600.00 |
| Subtotal | | | 50 | | 600.00 |
| 15 (1) | A-0008 | basmati | 50 | Cash | 750.00 |

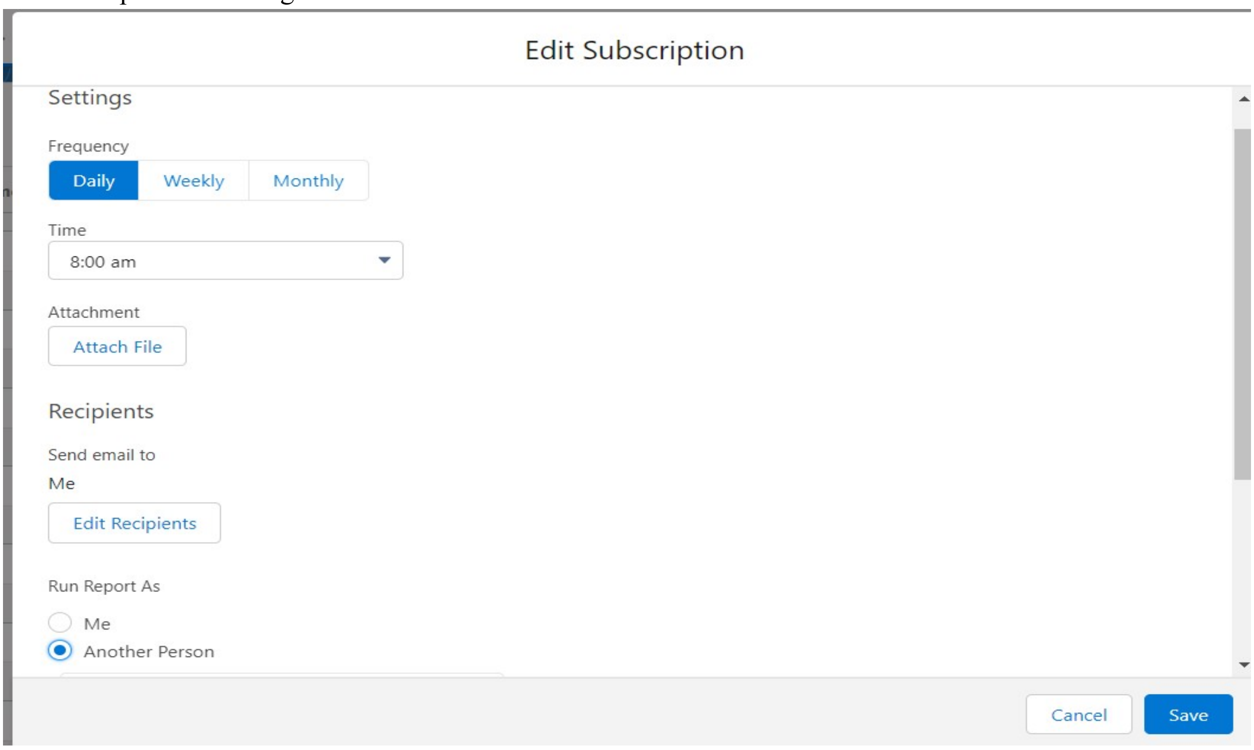
## Activity 2: Sharing report to owner

1. Click edit drop down and select subscribe option




| rice taken by shops | consumer: consumer name | rice type | rice price/kg | mode of payments | amount paid |
|---|---|---|---|---|---|
| 8 (1) | A-0003 | normal rice | 50 | Cash | 400.00 |
| Subtotal | | | 50 | | 400.00 |
| 10 (1) | A-0006 | basmati | 50 | Cash | 500.00 |
| Subtotal | | | 50 | | 500.00 |
| 12 (1) | A-0007 | basmati | 50 | Cash | 600.00 |
| Subtotal | | | 50 | | 600.00 |
| 15 (1) | A-0008 | basmati | 50 | Cash | 750.00 |
| Subtotal | | | 50 | | 750.00 |
| 16 (1) | A-0010 | normal rice | 50 | Cash | 800.00 |
| Subtotal | | | 50 | | 800.00 |
| 18 (1) | A-0009 | normal rice | 50 | Cash | 900.00 |
| Subtotal | | | 50 | | 900.00 |
| 80 (1) | A-0011 | basmati | 50 | Net banking | 4,000.00 |
| Subtotal | | | 50 | | 4,000.00 |
| Total (11) | | | 50 | | 9,050.00 |

2.
3. Follow as per below image.



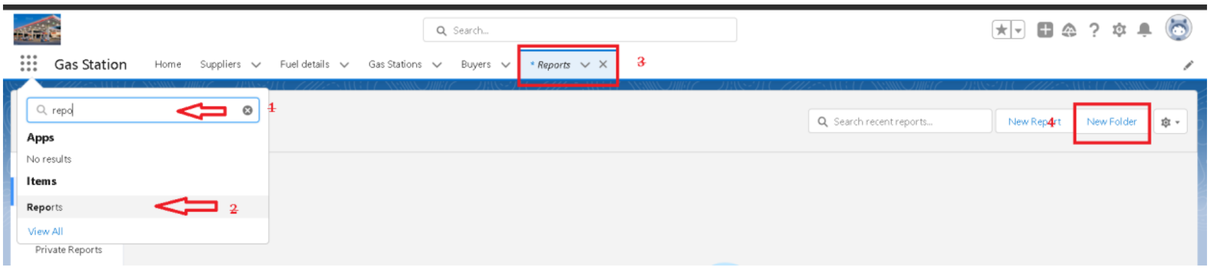

4.

5. After selecting the run report as a “another person” select your personal account or whom you want to send that mail to.
6. Click save.

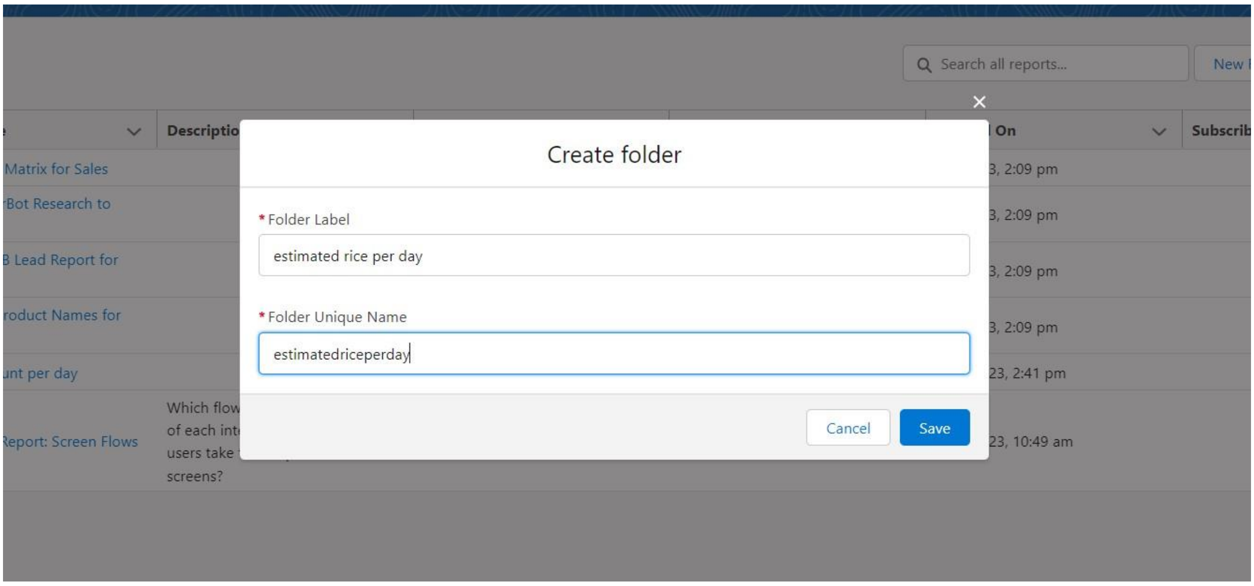
**NOTE: The owner gets daily email notification of that rice mill report.so that he can see all data remotely.**

## Activity 3: create a report folder

1. Click on the app launcher and search for reports.
2. Double click on the report, “ reports tab” will be auto populated in the navigation bar.
3. Click on the report tab, click on the new folder.



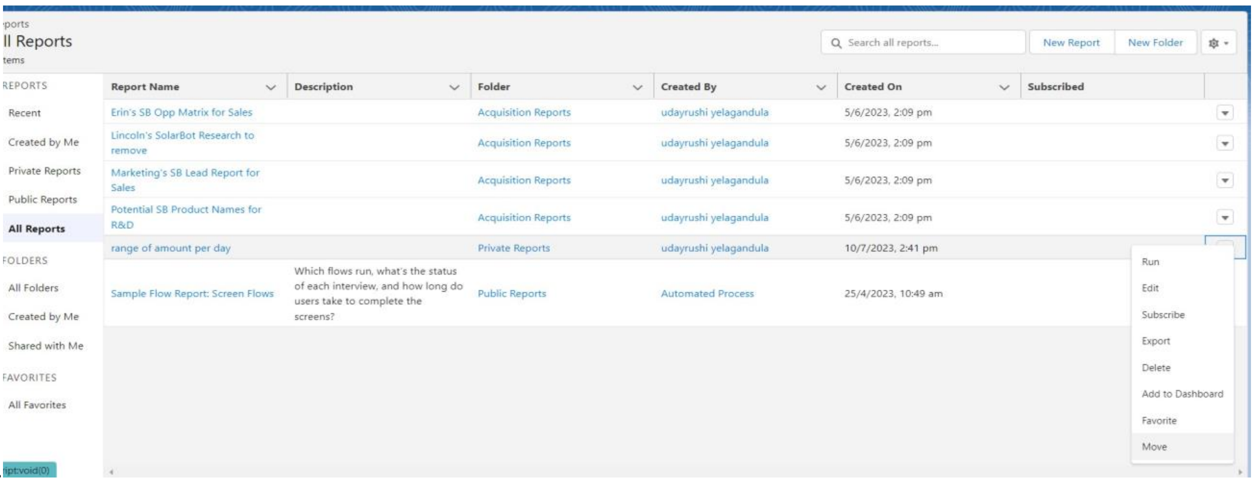

4. Give the Folder label as “estimated rice per day ”, Folder unique name will be auto populated.
5. Click save.




1.navigate to app launcher and click reports on that.

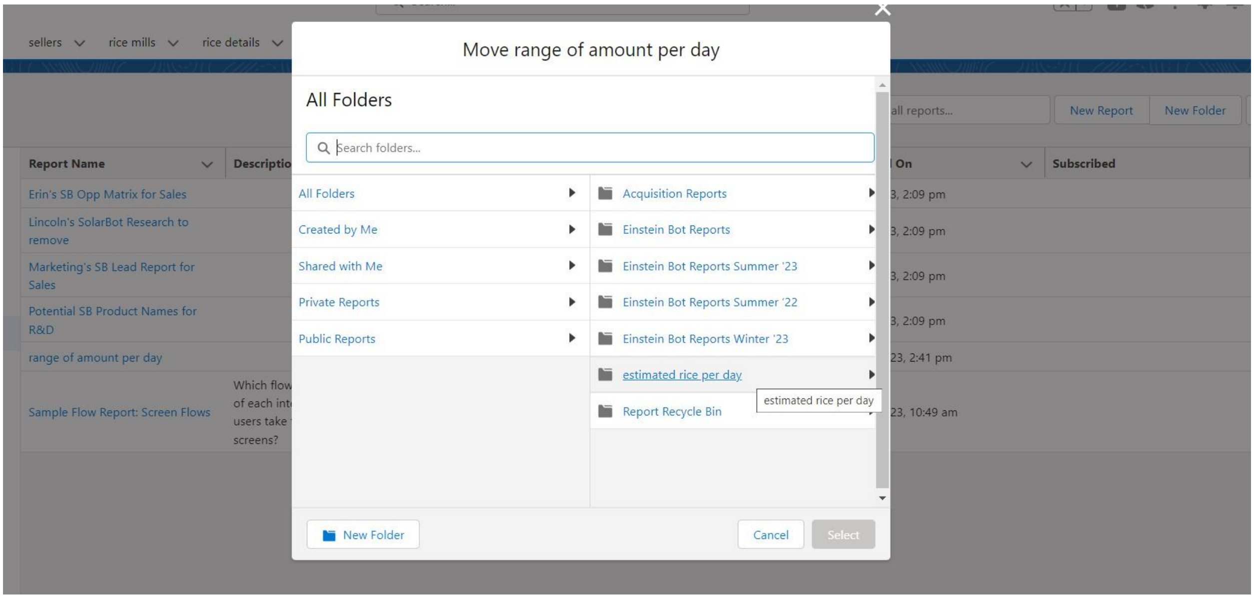
2.click all reports.

3. Select the range of amount per day drop down in that click move.




4.

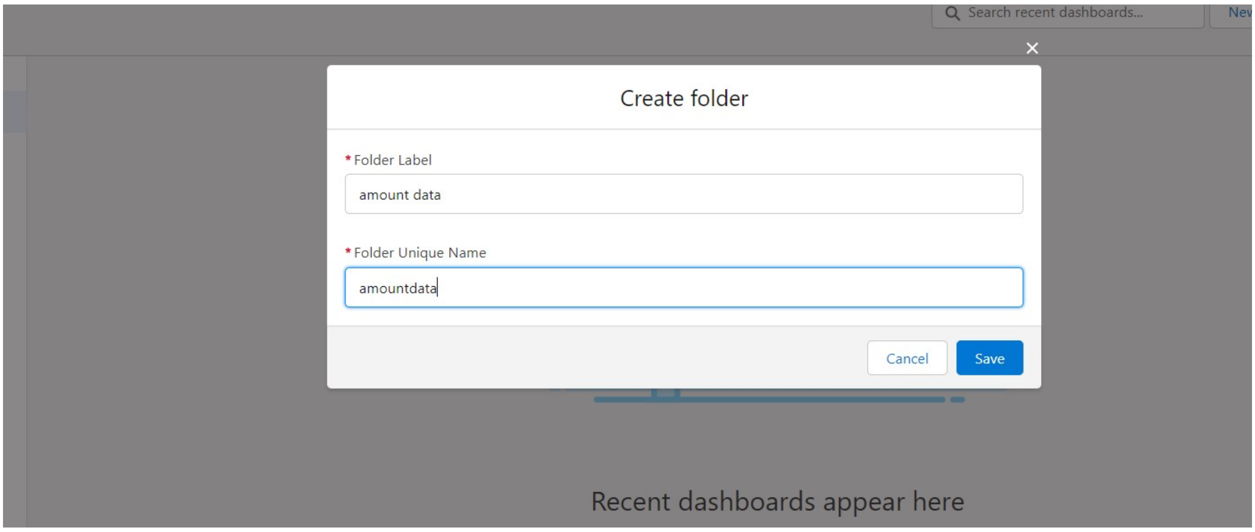
5. Select estimated rice per day folder and select folder.




**Note: if you want to see the report which you have created then go to reports - all folders - estimated rice per day - your report will appear in this way.**

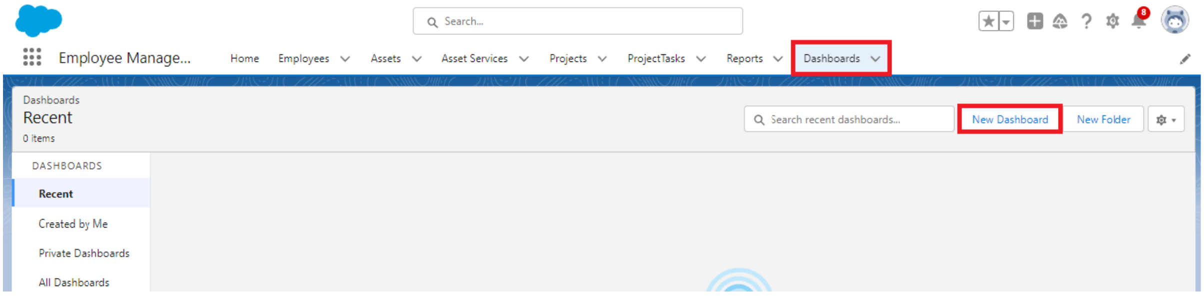
# MILESTONE 12 - DASHBOARDS

### Activity 1: Create Dashboard Folder

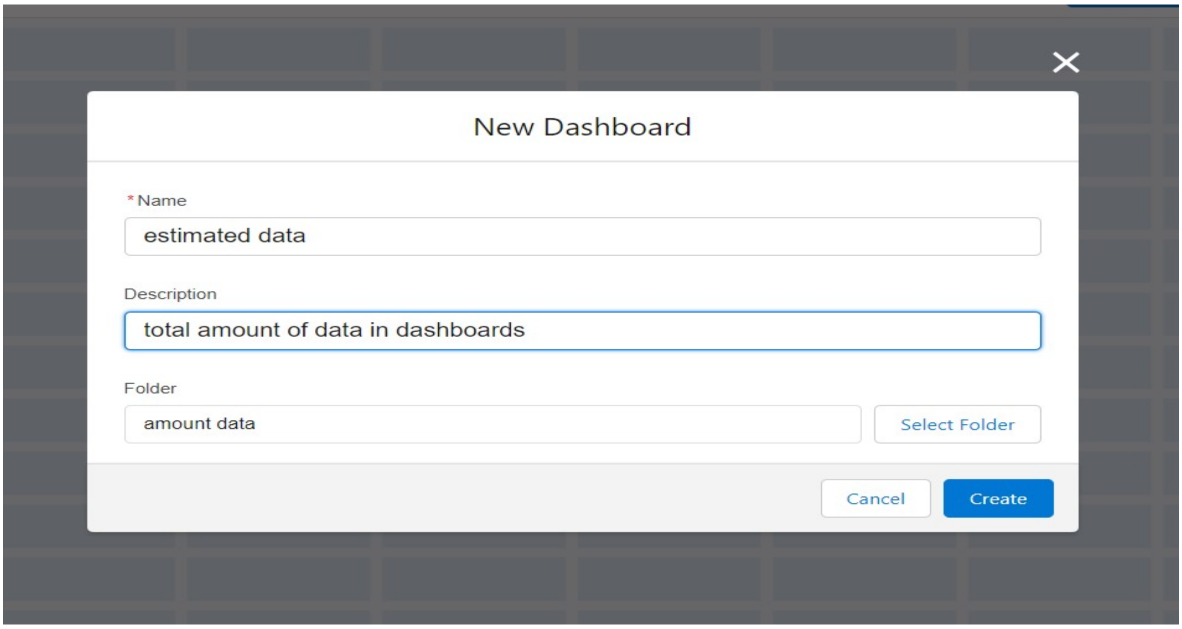
1. Click on the app launcher and search for the dashboard.
2. Click on the dashboard tab.
3. Click the new folder, give the folder label as " amount data dashboard".
4. Folder unique names will be auto populated.
5. Click save.
6. 


### Activity 2: Create Dashboard

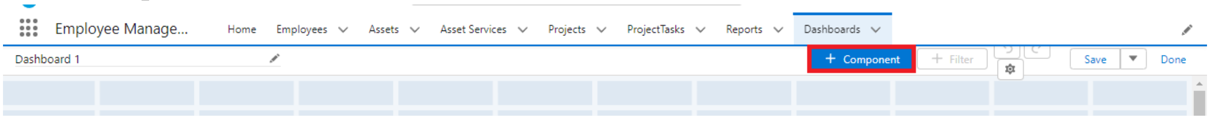
1. Go to the app → click on the Dashboards tabs.



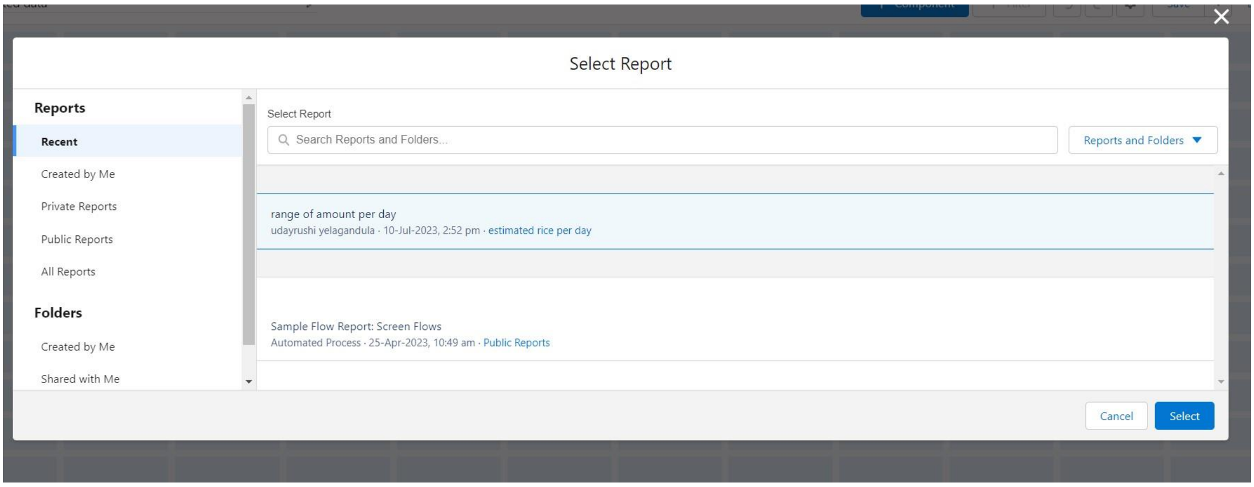

2. Give a Name and select the folder that was created, and click on create.



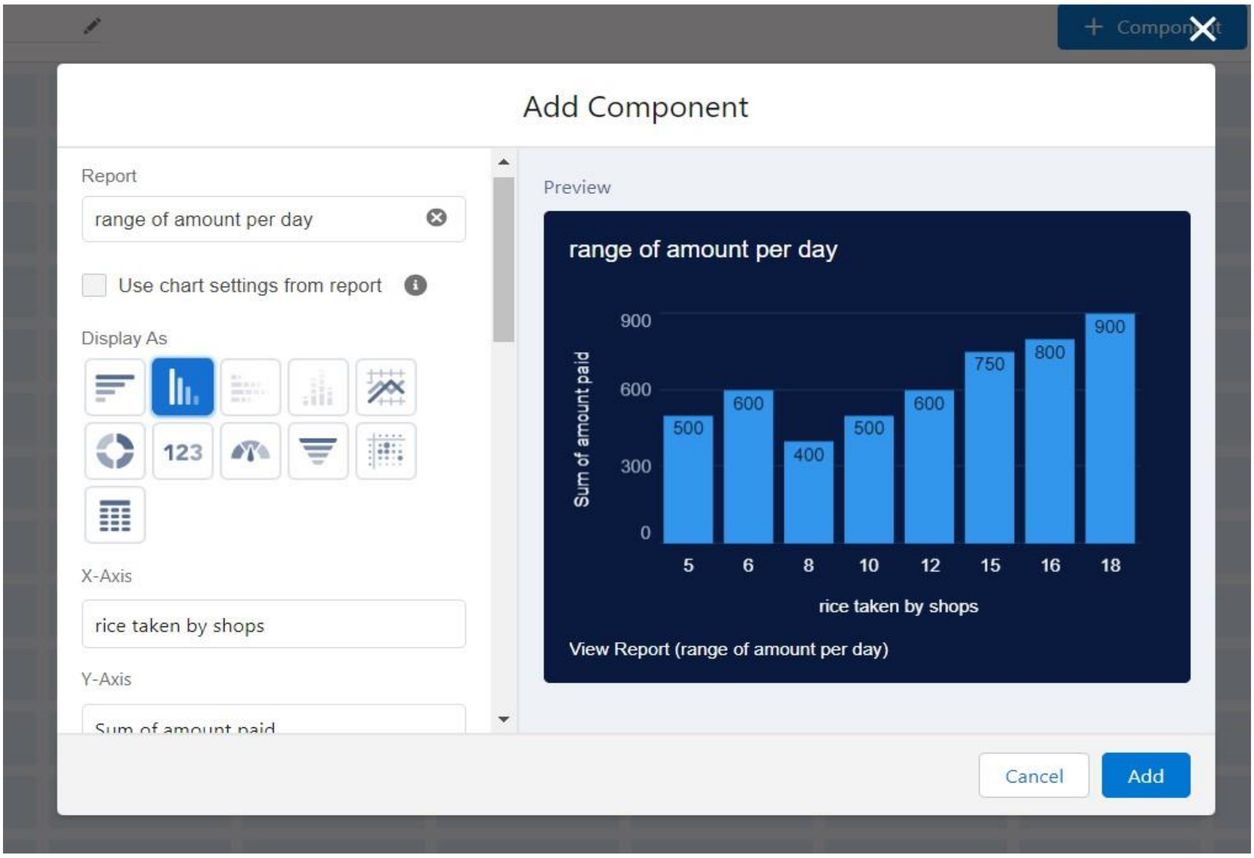

Select add component.




Select a Report and click on select.




Preview is shown below.




Display as- vertical bar chart

X-axis - rice taken by shops

Y-axis- sum of amount

Y-axis range - automatic

Sort by - rice taken by shops

Component theme - dark.

**Add the component**

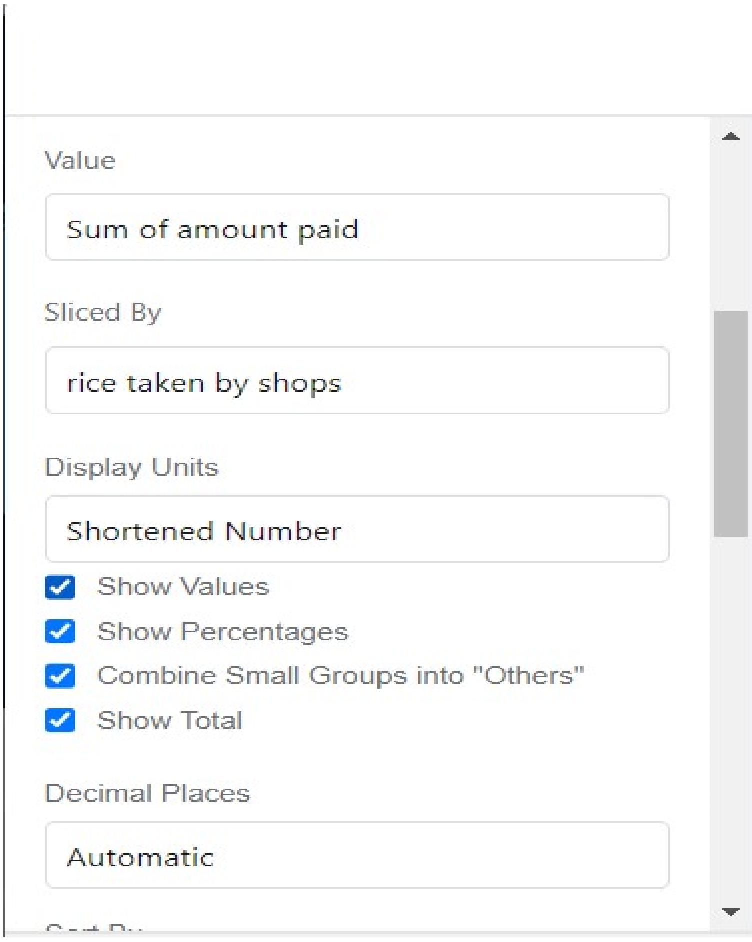
Again select add component with above same steps

1.display  as donut chart

2.sort by - sum of amount

3.title-range of amount per day

4.component theme dark




Click add.

Click save and done.