

A CRM APPLICATION FOR WHOLESALE MILL

A Detailed Document of my project

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ABSTRACT

1. Introduction

- **Project Title:** CRM Application for Wholesale Rice Mill
- **Objective:** To streamline the wholesale rice mill's customer relationship management, enhancing sales, service efficiency, and customer engagement through a Salesforce-based CRM system.
- **Technology Used:** Salesforce CRM, Apex, Visualforce, Lightning Web Components (LWC), Data Loader, Reports, and Dashboards.

2. Problem Statement

- Wholesale rice mills often face challenges in managing customer data, sales processes, order tracking, inventory management, and customer service due to the lack of centralized systems. The need for better visibility and customer interaction prompted the development of a CRM solution tailored for this industry.

3. Project Scope

- Develop a customized Salesforce CRM application for wholesale rice mill operations.
- Enable efficient customer management, order tracking, inventory control, and sales forecasting.
- Integrate sales, service, and marketing processes for smooth operations.
- Automate repetitive tasks to improve efficiency.
- Provide detailed reporting and dashboards to track business performance.

4. Requirements Analysis

- **Functional Requirements:**
 - **Customer Database:** Capture customer information, interaction history, and preferences.
 - **Order Management:** Create and track orders, delivery schedules, and payment statuses.
 - **Inventory Management:** Manage stock levels and provide alerts when inventory is low.
 - **Sales Automation:** Track sales opportunities and follow up on leads automatically.

- Service Management: Handle customer inquiries, complaints, and support tickets.
- Reporting and Analytics: Provide real-time insights on sales trends, inventory levels, and customer satisfaction.
- Non-Functional Requirements:
 - Security: Ensure data privacy and access control.
 - Scalability: Support the expansion of the rice mill with new customers and larger inventories.
 - Usability: Intuitive interface for non-technical users.

5. Design and Development

- Data Model:
 - Customer Object: Stores customer details such as name, address, contact info, etc.
 - Order Object: Tracks order details like product type, quantity, and delivery status.
 - Inventory Object: Monitors the rice mill's stock levels and product availability.
 - Opportunity Object: Manages the sales pipeline, tracking leads and closing deals.
- Business Logic:
 - Automation of tasks like lead assignment, order creation, and inventory reordering using Salesforce automation tools like Workflow Rules, Process Builder, and Flows.
- User Interface:
 - Customized layouts using Salesforce Lightning App Builder.
 - Lightning Web Components (LWC) for a user-friendly and modern interface.
- Integration:
 - Data integration with third-party systems such as accounting and payment platforms.
 - API integration for external customer portals and supplier management.

6. Implementation Plan

- Phase 1: Requirement Gathering and Business Analysis.
- Phase 2: Design and Customization of Salesforce Objects, Fields, and Relationships.
- Phase 3: Development of Apex Triggers, Validation Rules, and Workflows.
- Phase 4: UI Design with LWC and Visualforce.

- Phase 5: Integration with External Systems.
- Phase 6: Testing, Bug Fixing, and Data Migration.
- Phase 7: Training Users and Final Deployment.

7. Testing

- Unit Testing: Ensure that each component (Apex classes, LWC, etc.) functions correctly.
- System Testing: Verify that the entire CRM system works as expected.
- User Acceptance Testing (UAT): Allow end-users to validate the system against

their requirements and business needs.

8. Deployment

- Deployment of the CRM application to the production environment using Salesforce's Change Sets or Salesforce DX.
- Training provided to end-users (sales teams, customer service representatives, and managers) on how to use the CRM system effectively.

9. Post-Deployment Support

- Maintenance: Provide ongoing support for bug fixes, performance optimization, and new feature requests.
- User Feedback and Iteration: Gather user feedback and continuously improve the system by adding more custom features or enhancements.

10. Results and Benefits

- Improved Customer Management: A centralized customer database providing easy access to customer details, order history, and communication logs.
- Increased Sales Efficiency: Automated lead tracking, order management, and opportunity handling improved sales performance.
- Better Inventory Management: Real-time monitoring of stock levels, ensuring optimal inventory control and timely reorders.
- Enhanced Customer Service: Faster issue resolution with automated case management and improved service response times.
- Data-Driven Decisions: Detailed reports and dashboards providing insights into sales trends, inventory status, and customer behavior.

11. Challenges

- Resistance to adopting new technology from staff used to manual processes.
- Data migration complexities from legacy systems to Salesforce.
- Customization of Salesforce objects to align with specific business needs of the wholesale rice mill industry.

12. **Conclusion**

- The CRM application for the wholesale rice mill was successfully developed and implemented on the Salesforce platform. It has improved operational efficiency, enhanced customer relationships, and provided management with the insights needed to make informed decisions. This project demonstrates how a tailored CRM solution can have a significant impact on business outcomes.

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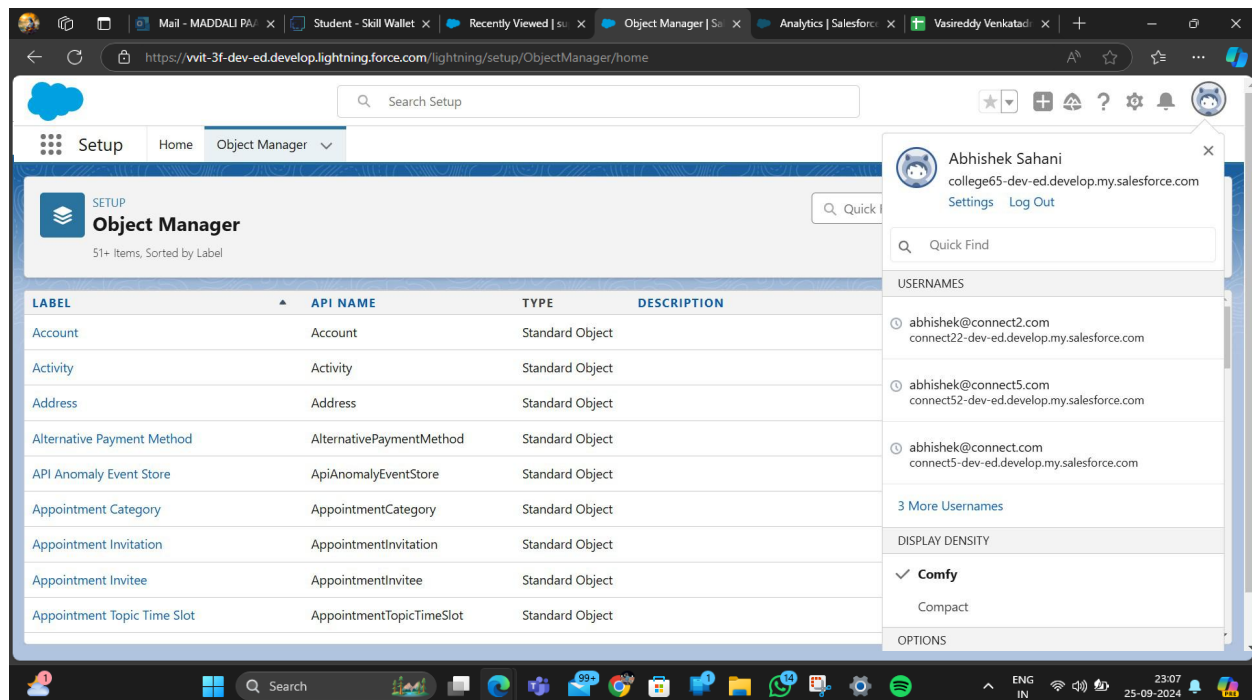
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INTRODUCTION:

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.

TASK-1: Creating the Developer Account And Its Activation...



TASK-2: Creating the objects for suppliers, consumers, rice mill and ricedetails.

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.

Mail - MADDALI PA... Student - Skill Wallet x Recently Viewed | su x supplier | Salesforce x Analytics | Salesforce x Vasireddy Venkatad... x

https://vvit-3f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dL000002crAD/Details/view

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

Search Layouts

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

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https://vvit-3f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dL000002crOj/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
consumer

Details Edit Delete

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Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Details

Description

API Name
consumer__c

Custom
✓

Singular Label
consumer

Plural Label
consumers

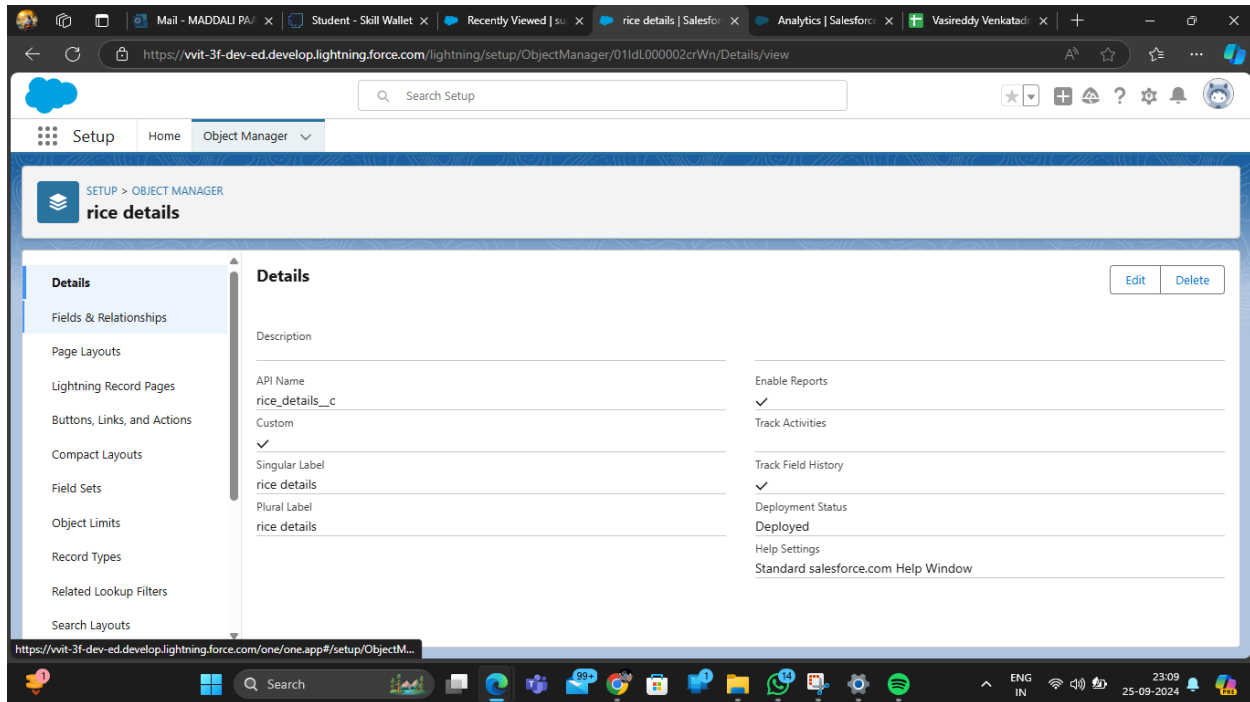
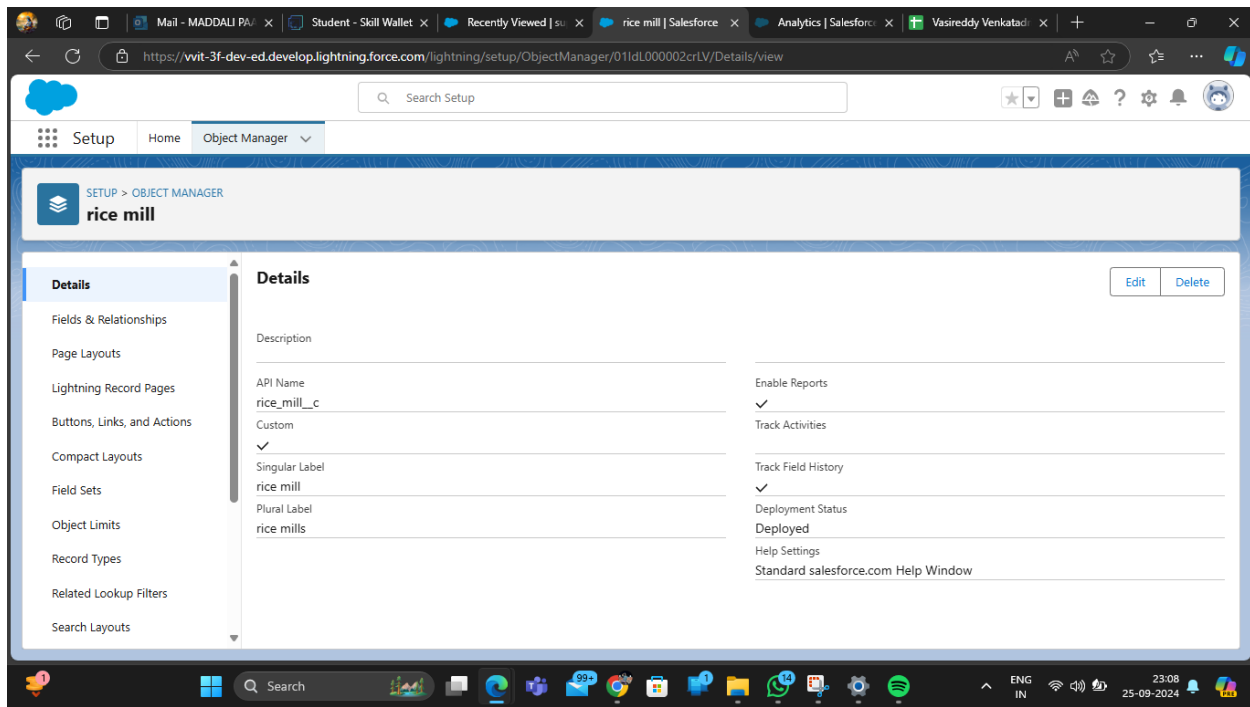
Enable Reports
✓

Track Activities

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window



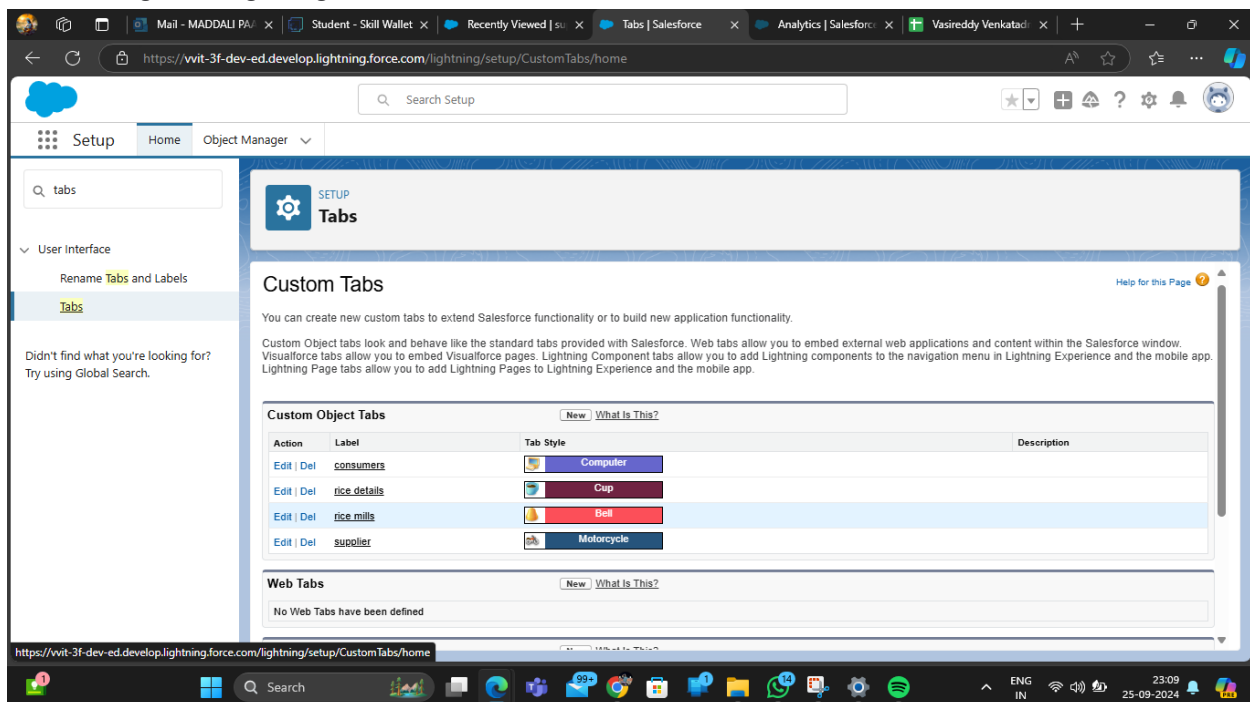
TASK-3: Creating the tabs For Consumer, Supplier, Rice mill and Rice Details

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 Tab:

1. Custom Tabs
2. Web Tabs

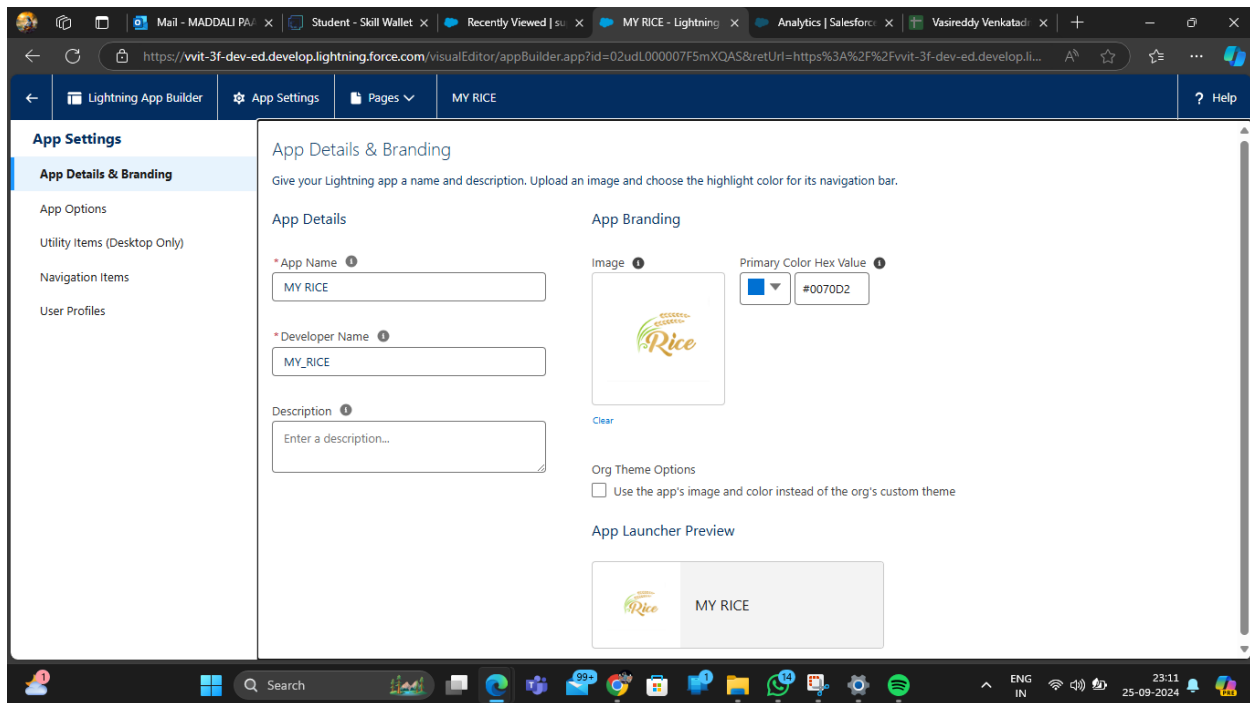
3. Visualforce Tabs
4. Lightning Component Tabs
5. Lightning Page Tabs



TASK-4: Create a Lightning App Builder

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.



TASK-5: Create fields for Consumer, Supplier, ricemill and rice details

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.

The screenshot shows the Salesforce Object Manager interface for the 'consumer' object. The 'Fields & Relationships' section is active, displaying a list of 15 fields sorted by Field Label. The fields are as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid__c	Formula (Number)		
consumer Name	Name	Auto Number		✓
Consumer Name	Consumer_Name__c	Formula (Text)		
Created By	CreatedById	Lookup(User)		
email	email__c	Email		
First name	First_name__c	Text(18)		
Last Modified By	LastModifiedById	Lookup(User)		
Last name	Last_name__c	Text(18)		
Mode of payment	Mode_of_payment__c	Picklist		

The interface includes a left sidebar with navigation options like Details, Fields & Relationships, Page Layouts, and others. The top navigation bar shows 'Setup' and 'Object Manager'. The bottom of the screen displays the Windows taskbar with various application icons and system information.

Mail - MADDALI PA...Student - Skill WalletRecently Viewed | s...supplier | SalesforceAnalytics | SalesforceVasireddy Venkata...+https://vvit-3f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000002crAD/FieldsAndRelationships/view

SetupHomeObject Manager

supplier

Details

Fields & Relationships

7 Items, Sorted by Field Label

Quick FindNewDeleted 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)		
rice taken	rice_taken_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)		✓

Search

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Mail - MADDALI PA...Student - Skill WalletRecently Viewed | s...rice mill | SalesforceAnalytics | SalesforceVasireddy Venkata...+https://vvit-3f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000002crtLV/FieldsAndRelationships/view

SetupHomeObject Manager

rice mill

Details

Fields & Relationships

9 Items, Sorted by Field Label

Quick FindNewDeleted 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)		✓
Record Type	RecordTypeId	Record Type		✓
rice distributed to shops	rice_distributed_to_shops_c	Roll-Up Summary (SUM rice details)		
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)		
sum of rice distributed	sum_of_rice_distributed_c	Roll-Up Summary (SUM rice details)		

Search

ENG IN23:1325-09-2024

The screenshot shows the Salesforce Setup interface for the 'rice details' object. The left sidebar contains a navigation menu with options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled 'Fields & Relationships' and displays a table of 6 items, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are Created By, Last Modified By, rice details Name, rice distributed, rice mill 1(one), and supplier Name.

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 Name	supplier_Name__c	Master-Detail(supplier)		✓

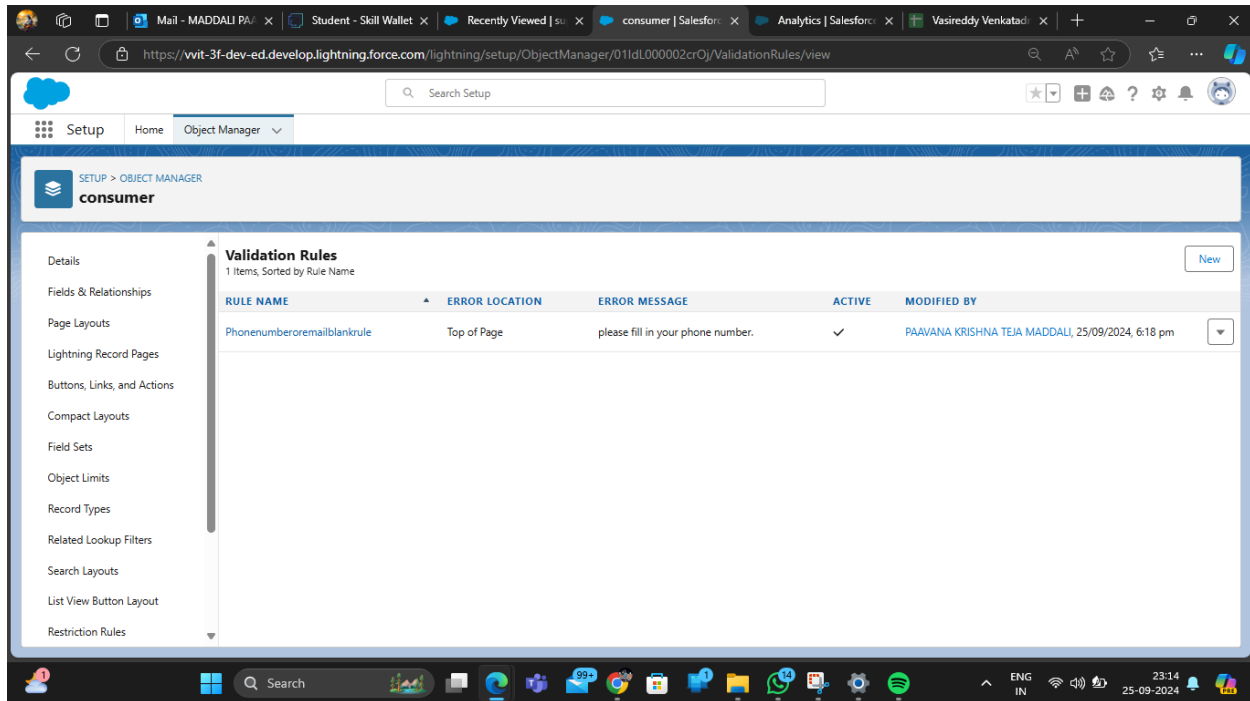
This is a duplicate of the screenshot above, showing the same Salesforce Setup interface for the 'rice details' object. The table of fields and relationships is identical.

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 Name	supplier_Name__c	Master-Detail(supplier)		✓

6. Creating Validation rules for objects

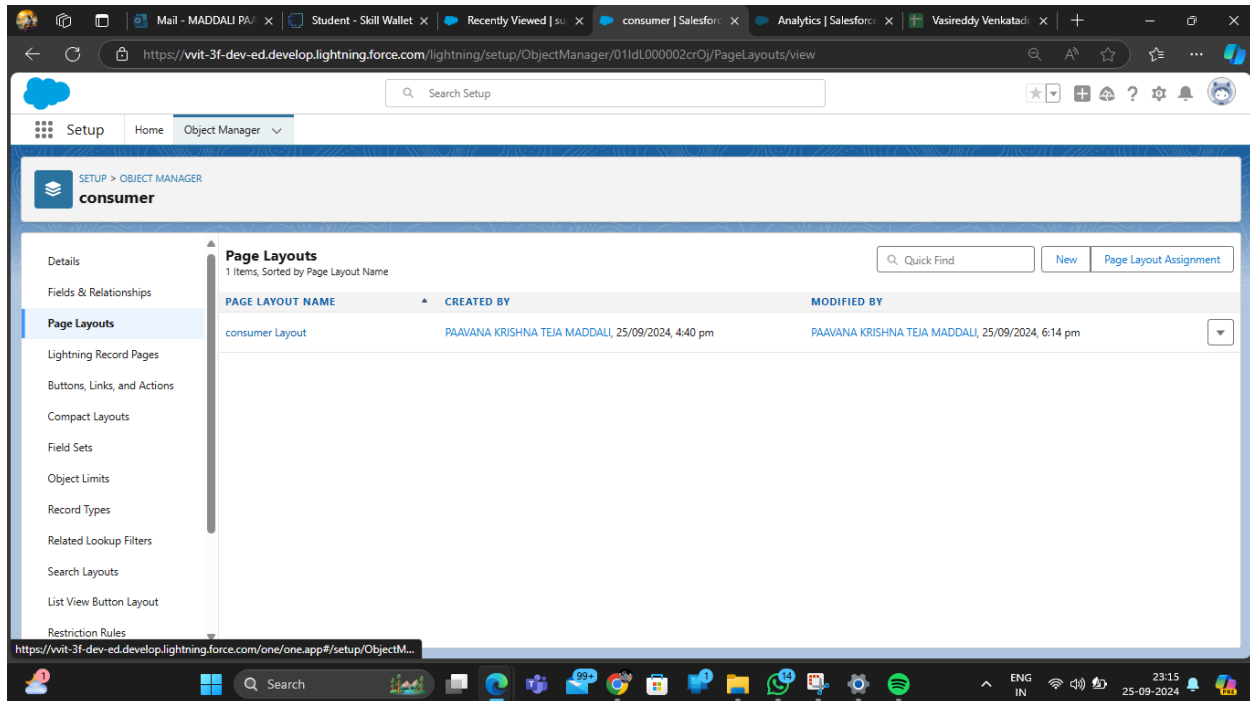
Improve the quality of your data using validation rules. Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of "True" or "False". 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.



TASK-6:Creating the page Layout for objects

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.



TASK-7: Creating Profiles of Owner, worker, and Employee

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

1. Standard profiles:

By default salesforce provides below standard profiles.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

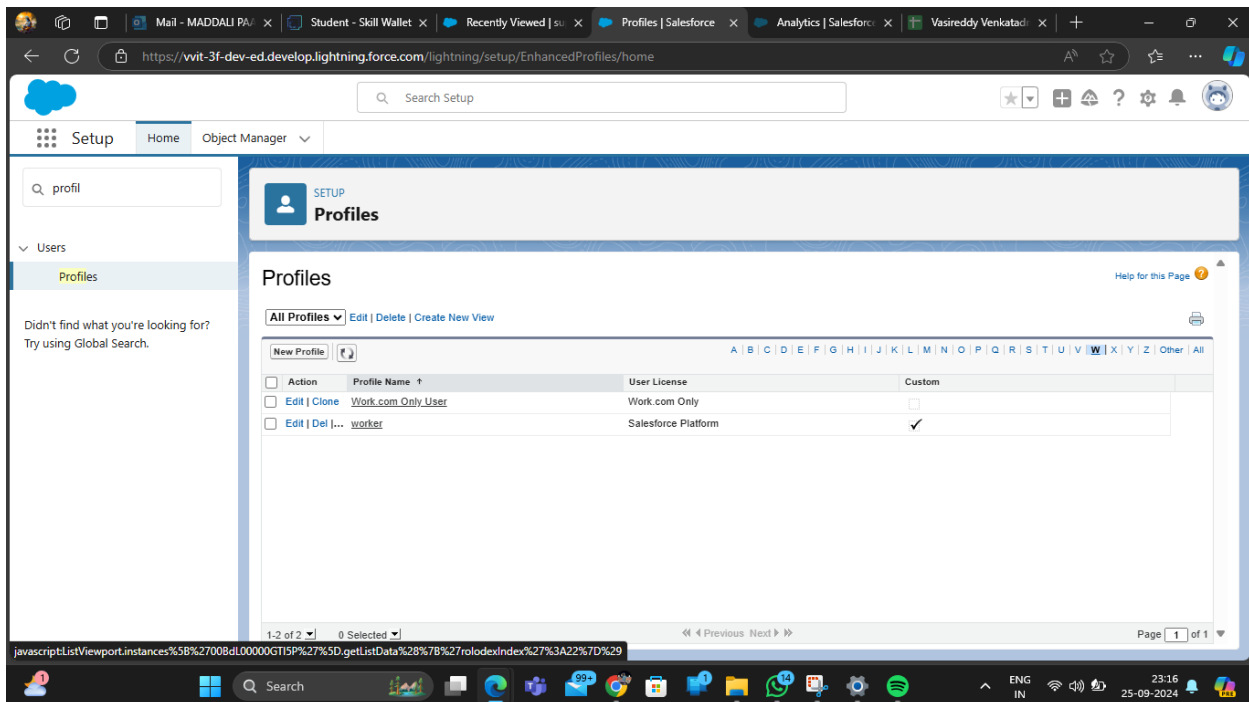
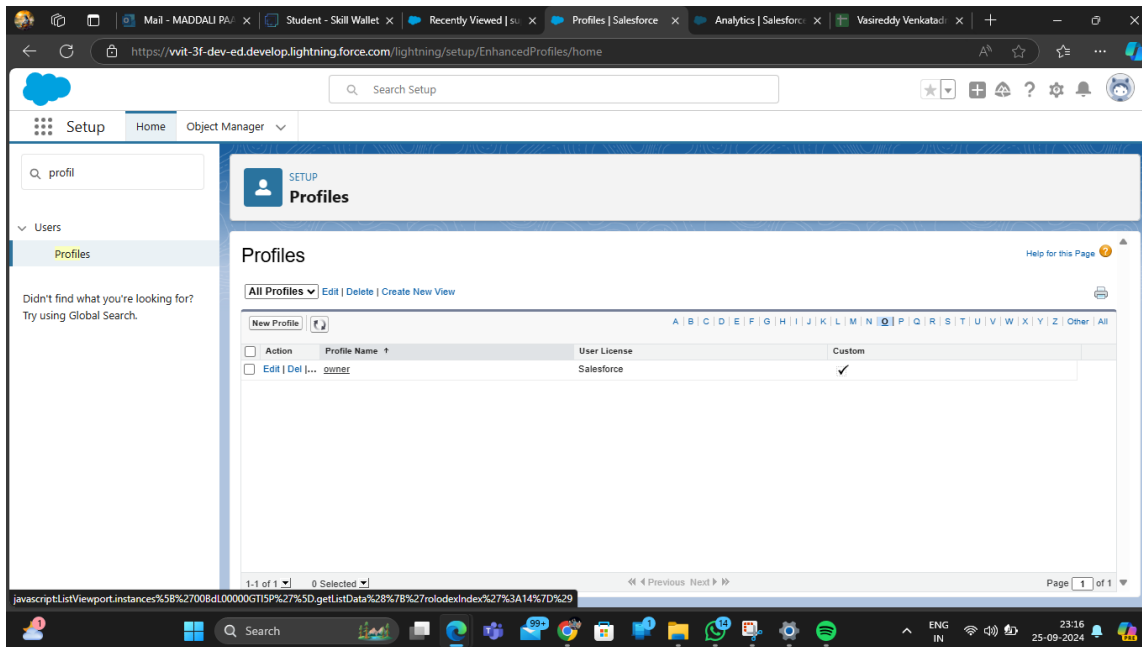
We cannot deleted standard ones

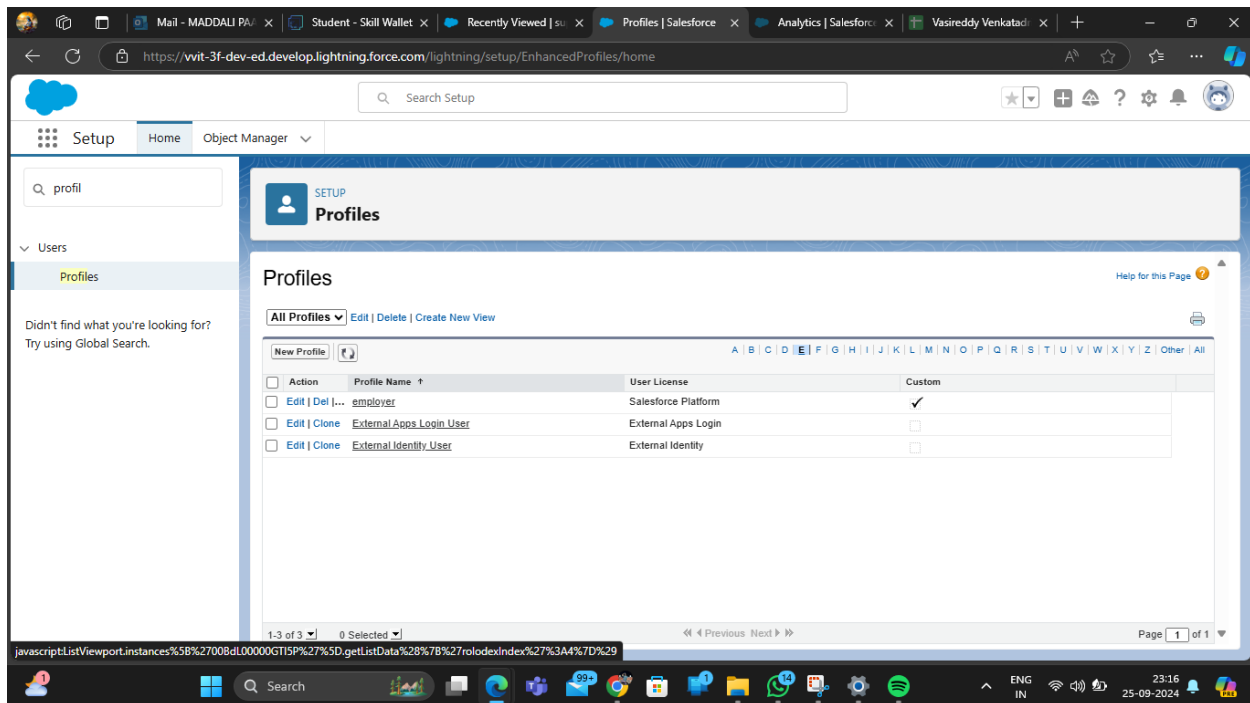
Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

2. Custom Profiles:

Custom ones defined by us.

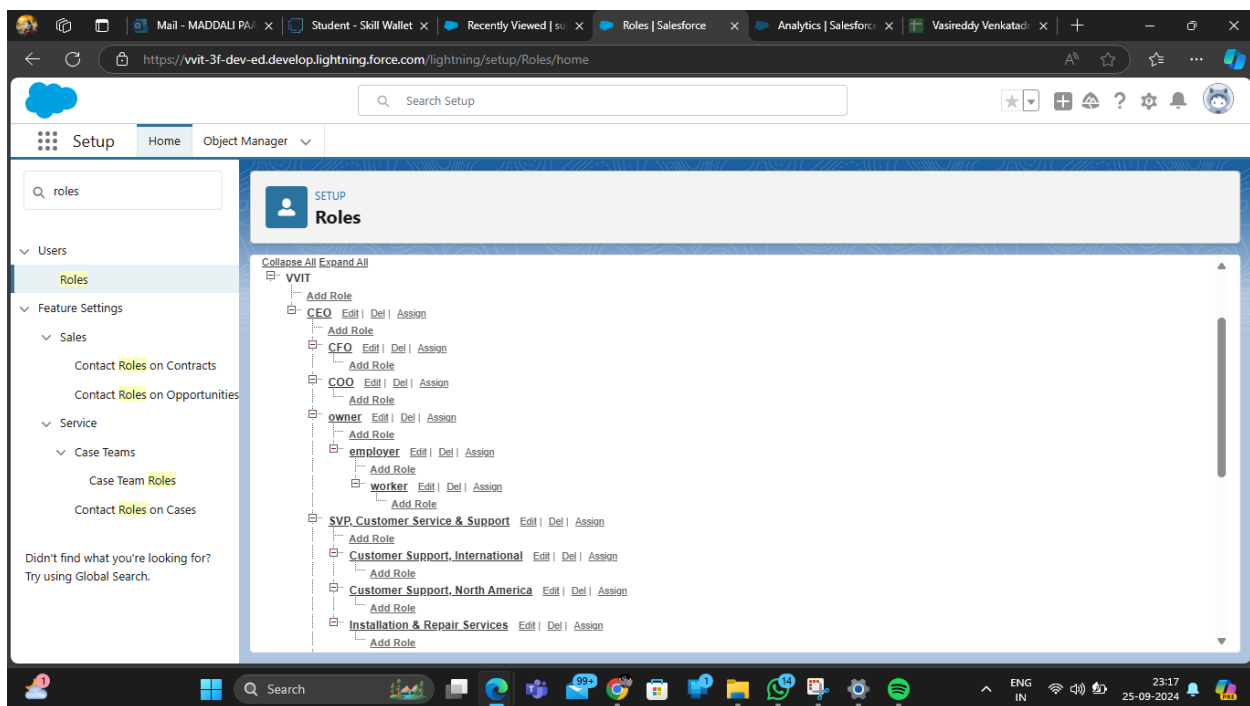
They can be deleted if there are no users assigned with that particular one.





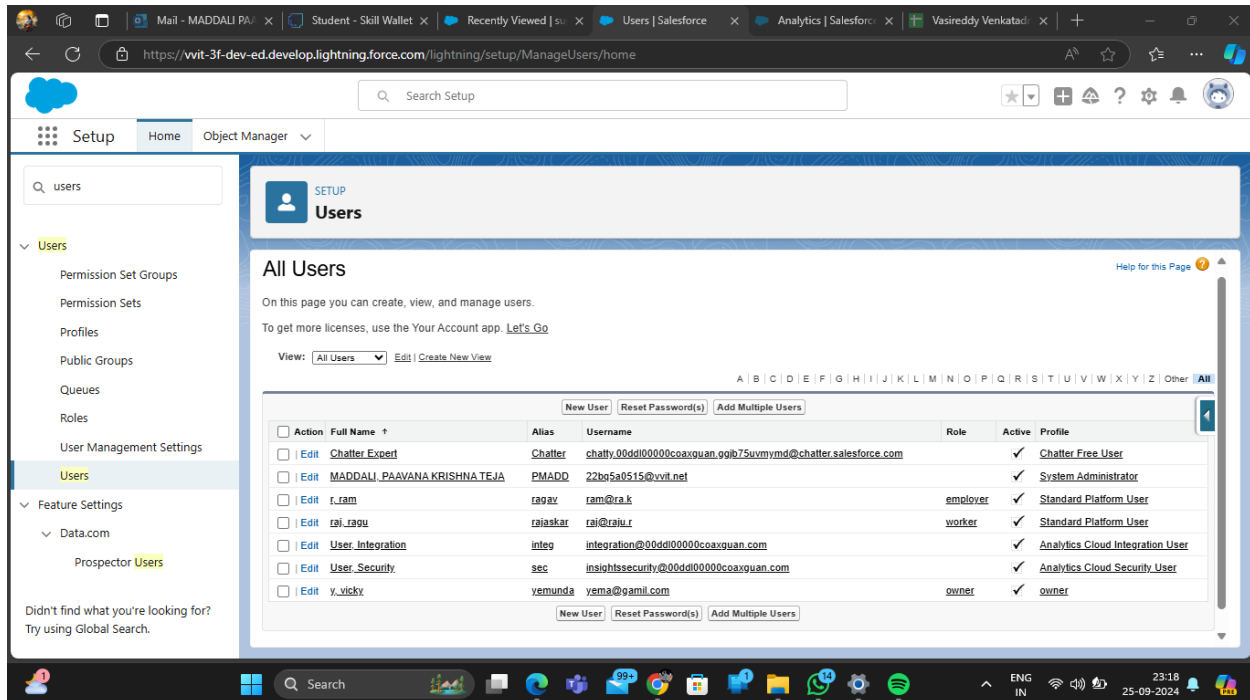
TASK-8:Creating Roles

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.



TASK-9: Creating Users

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.



The screenshot shows the Salesforce Setup page for Users. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, and Data.com. The main content area is titled 'All Users' and includes a search bar, a 'View' dropdown set to 'All Users', and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including Chatter Expert, MADDALI PAAVANA KRISHNA TEJA, s. ram, rai. ragu, User Integration, User Security, and y. vicky. The bottom of the screen shows a Windows taskbar with various application icons and the system clock.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00ddi00000coaxquan.gpb75uvmymd@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	MADDALI PAAVANA KRISHNA TEJA	PMADD	22b05a0515@vvit.net		✓	System Administrator
<input type="checkbox"/> Edit	s. ram	ragav	ram@ra.k	employer	✓	Standard Platform User
<input type="checkbox"/> Edit	rai. ragu	raiaakar	rai@raju.t	worker	✓	Standard Platform User
<input type="checkbox"/> Edit	User Integration	integ	integration@00ddi00000coaxquan.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00ddi00000coaxquan.com		✓	Analytics Cloud Security User
<input type="checkbox"/> Edit	y. vicky	yemunda	yema@gamil.com	owner	✓	owner

TASK-10: Creating OWD settings

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.

The screenshot displays the Salesforce Sharing Settings page. The left sidebar shows the navigation menu with 'Setup' and 'Object Manager' options. The main content area is titled 'Sharing Settings' and contains a table of sharing settings for various objects. The table has three columns: Object Name, Sharing Model, and Sharing Settings. The 'Other Settings' section at the bottom includes 'Manager Groups' and 'Secure guest user record access'.

Object Name	Sharing Model	Sharing Settings
User Provisioning Request	Private	Private
Waillist	Private	Private
Web Cart Document	Private	Private
Work Order	Private	Private
Work Plan	Private	Private
Work Plan Template	Private	Private
Work Step Template	Private	Private
Work Type	Private	Private
Work Type Group	Public Read/Write	Private
consumer	Controlled by Parent	Controlled by Parent
rice details	Controlled by Parent	Controlled by Parent
rice mill	Public Read Only	Private
supplier	Public Read Only	Private

Other Settings

Manager Groups ☐ 1

Secure guest user record access ☒ 1

TASK-11.Creating the app reports And 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.

Browser tabs: Mail - MADDALI PA..., Student - Skill Wallet x, Recently Viewed | s..., Sharing Settings | S..., Analytics | Salesforc..., Vasireddy Venkatadi x

Address bar: https://vvit-3f-dev-ed.develop.lightning.force.com/lightning/o/supplier_c/list?filterName=__Recent

Navigation: MY RICE | supplier | rice mills | rice details | consumers | Reports | Analytics | estimated date | Setup

Supplier Recently Viewed

4 items • Updated an hour ago

Search this list...

	<input type="checkbox"/> supplier Name	
1	<input type="checkbox"/> prakash	▼
2	<input type="checkbox"/> prasanth	▼
3	<input type="checkbox"/> barath kumar	▼
4	<input type="checkbox"/> siddu	▼

javascript:void(0);

Taskbar: Search, 23:18 25-09-2024

Browser tabs: Mail - MADDALI PA..., Student - Skill Wallet x, Recently Viewed | ri..., Sharing Settings | S..., Analytics | Salesforc..., Vasireddy Venkatadi x

Address bar: https://vvit-3f-dev-ed.develop.lightning.force.com/lightning/o/rice_mill_c/list?filterName=__Recent

Navigation: MY RICE | supplier | rice mills | rice details | consumers | Reports | Analytics | estimated date

Rice mills Recently Viewed

7 items • Updated a few seconds ago

Search this list...

	<input type="checkbox"/> rice mill Name	
1	<input type="checkbox"/> rice-007	▼
2	<input type="checkbox"/> rice-004	▼
3	<input type="checkbox"/> rice-005	▼
4	<input type="checkbox"/> rice-006	▼
5	<input type="checkbox"/> rice-003	▼
6	<input type="checkbox"/> rice-002	▼
7	<input type="checkbox"/> rice-001	▼

https://vvit-3f-dev-ed.develop.lightning.force.com/lightning/o/rice_mill_c/home

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https://vvit-3f-dev-ed.develop.lightning.force.com/lightning/o/rice_details_c/list?filterName=__Recent

MY RICE supplier rice mills rice details consumers Reports Analytics estimated date

rice details
Recently Viewed

5 items • Updated a few seconds ago

Search this list...

	<input type="checkbox"/> rice details Name	
1	<input type="checkbox"/> rice-005	
2	<input type="checkbox"/> rice-004	
3	<input type="checkbox"/> rice-003	
4	<input type="checkbox"/> rice-002	
5	<input type="checkbox"/> rice-001	

https://vvit-3f-dev-ed.develop.lightning.force.com/lightning/o/rice_details_c/home...

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https://vvit-3f-dev-ed.develop.lightning.force.com/lightning/o/consumer_c/list?filterName=__Recent

MY RICE supplier rice mills rice details consumers Reports Analytics estimated date

consumers
Recently Viewed

4 items • Updated a few seconds ago

Search this list...

	<input type="checkbox"/> consumer Name	
1	<input type="checkbox"/> consumers-004	
2	<input type="checkbox"/> consumers-003	
3	<input type="checkbox"/> consumers-002	
4	<input type="checkbox"/> consumers-001	

https://vvit-3f-dev-ed.develop.lightning.force.com/lightning/o/consumer_c/home

MY RICE supplier rice mills rice details consumers Reports Analytics estimated date

Reports Recent 2 items

Search recent reports... New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	range of amount per day		estimated rice per day	PAAVANA KRISHNA TEJA MADDALI	25/9/2024, 7:35 pm	✓
Created by Me	range of amount per day		Private Reports	PAAVANA KRISHNA TEJA MADDALI	25/9/2024, 9:27 pm	
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

https://vvit-3f-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

MY RICE supplier rice mills rice details consumers Reports Analytics estimated date

Report: rice mills with consumers range of amount per day

Enable Field Editing

Total Records: 4 Total Amount Paid: 346.00 Total rice price/kg: 256

Sum of Amount Paid

Consumer Name

bharath k

krishna m

prasanth p

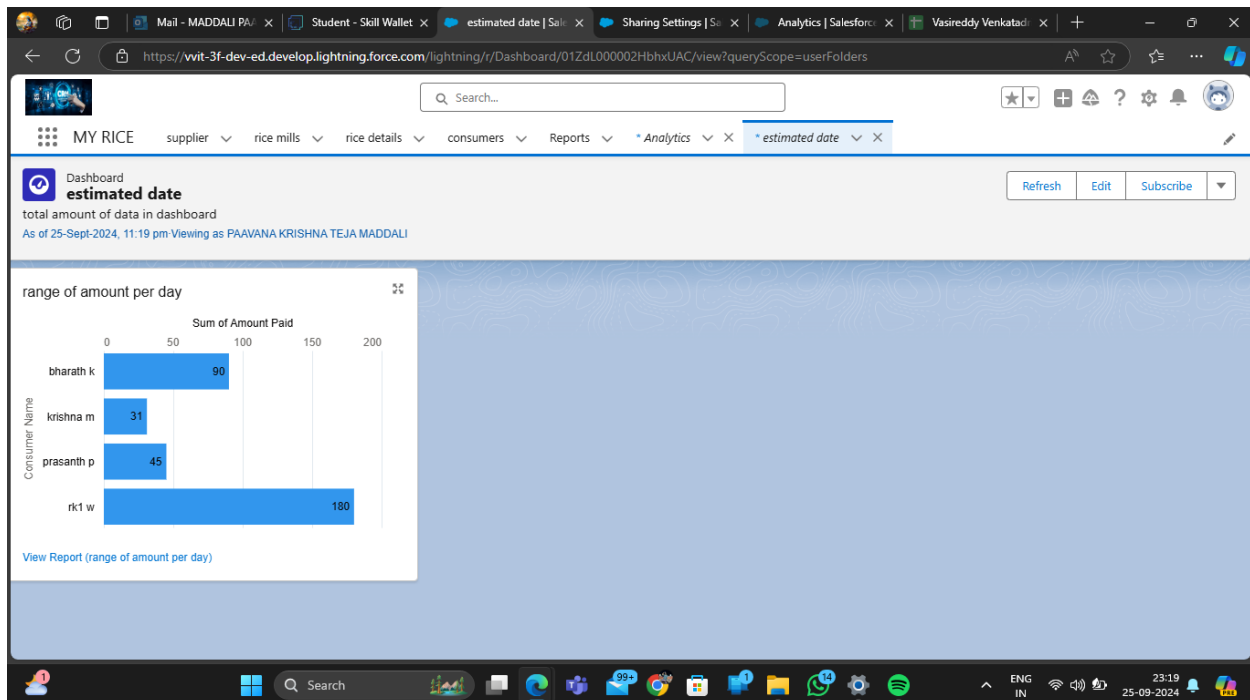
rk1 w

Row Counts: Detail Rows: Subtotals: Grand Total:

Report: rice mills with consumers
range of amount per day

Total Records: 4 Total Amount Paid: 346.00 Total rice price/kg: 256

Consumer Name	rice mill: rice mill Name	consumer: consumer Name	Amount Paid	Mode of payment	rice price/kg	Rice type
bharath k (1)	rice-006	consumers-001	90.00	UPI	90	1.basmati
Subtotal			90.00		90	
krishna m (1)	rice-004	consumers-003	31.00	Debit card	31	1.basmati
Subtotal			31.00		31	
prasanth p (1)	rice-005	consumers-002	45.00	Cash	45	2.normal rice
Subtotal			45.00		45	
rk1 w (1)	rice-007	consumers-004	180.00	Credit card	90	2.normal rice
Subtotal			180.00		90	
Total (4)			346.00		256	



TASK-12:Creating apex Class and apex Triggers

Apex is a strongly typed, object-oriented programming language that allows developers to execute flow and transaction control statements on the Lightning platform server in conjunction with calls to the Lightning Platform? API. Using syntax that looks like Java and acts like database stored procedures, Apex enables developers to add

business logic to most system events, including button clicks, related record updates, and Visualforce pages. Apex code can be initiated by Web service requests and from triggers on objects.

It is as similar as java i.e, it also supports OOP(Object oriented programming) like Classes, objects, methods.

