

A CRM APPLICATION FOR WHOLESALE RICE MILL

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Project Abstract

The Rice Mill CRM Application is a software solution designed to streamline and automate various operations within a rice mill factory. It serves as a centralized system for managing daily rice production, tracking sales, and generating reports on the different types of rice sold. The application aims to enhance customer relationships, improve operational efficiency, and provide daily reports to the mill owners on production and sales, ensuring that decision-making is data-driven and timely.

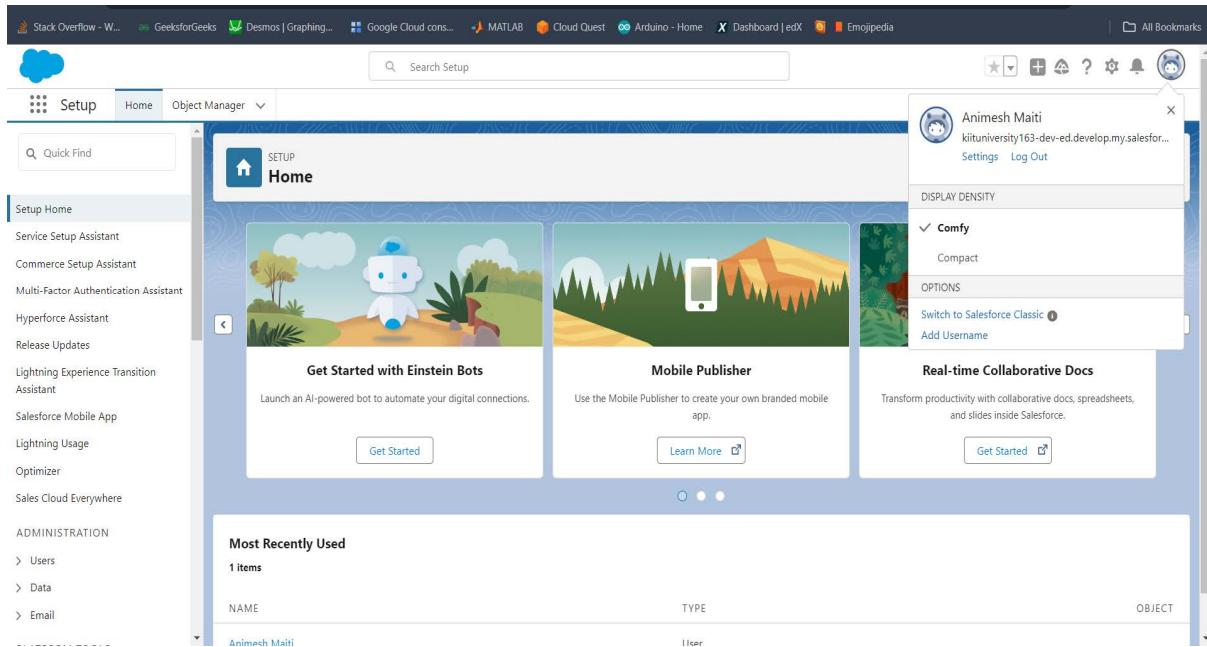
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INTRODUCTION

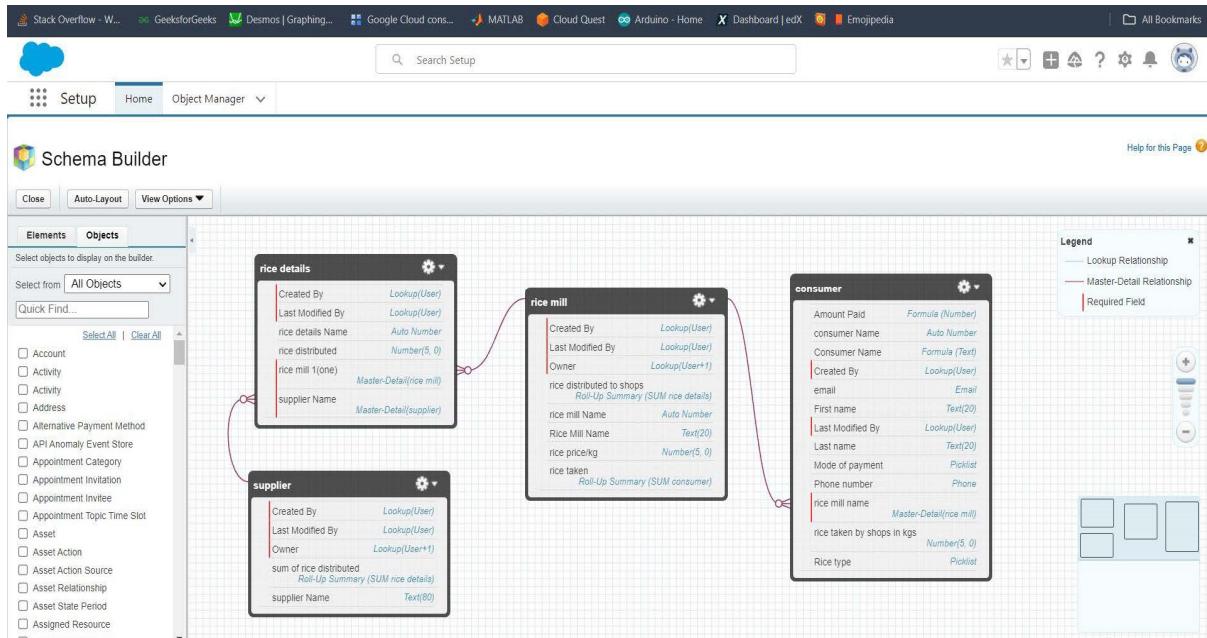
The Rice Mill CRM Application is a comprehensive software platform designed to streamline and automate the key operations of a rice mill factory. This centralized system manages daily rice production, tracks sales, and provides detailed reports on the various types of rice sold. To enhance performance, security, and operational efficiency, the Rice Mill CRM Application is transitioning to Salesforce, a cutting-edge cloud technology. By leveraging Salesforce, the application ensures secure storage of sensitive business data through robust encryption and continuous backups. The cloud's automated data replication capabilities also provide efficient disaster recovery, safeguarding crucial information. With access to scalable and reliable cloud resources, the Rice Mill CRM Application optimizes performance, delivering fast, reliable data access while simplifying administrative tasks. This transition enables rice mill owners and operators to focus on higher-level decision-making, ultimately boosting productivity and driving overall business efficiency.

Task 1: Salesforce



Activity 1: Already Have An Account

Task 2: Object



Activity - Create 4 objects supplier, rice mill, consumer, rice details

Task 3: Tabs

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The 'Custom Object Tabs' section lists several tabs, each with an 'Edit | Del' button and a 'Tab Style' icon. The 'rice_details' tab is highlighted with a red border. The 'Web Tabs' section below it shows a message: 'No Web Tabs have been defined'.

Activity: Created 4 Custom Tabs - supplier, rice mill, consumer, rice details

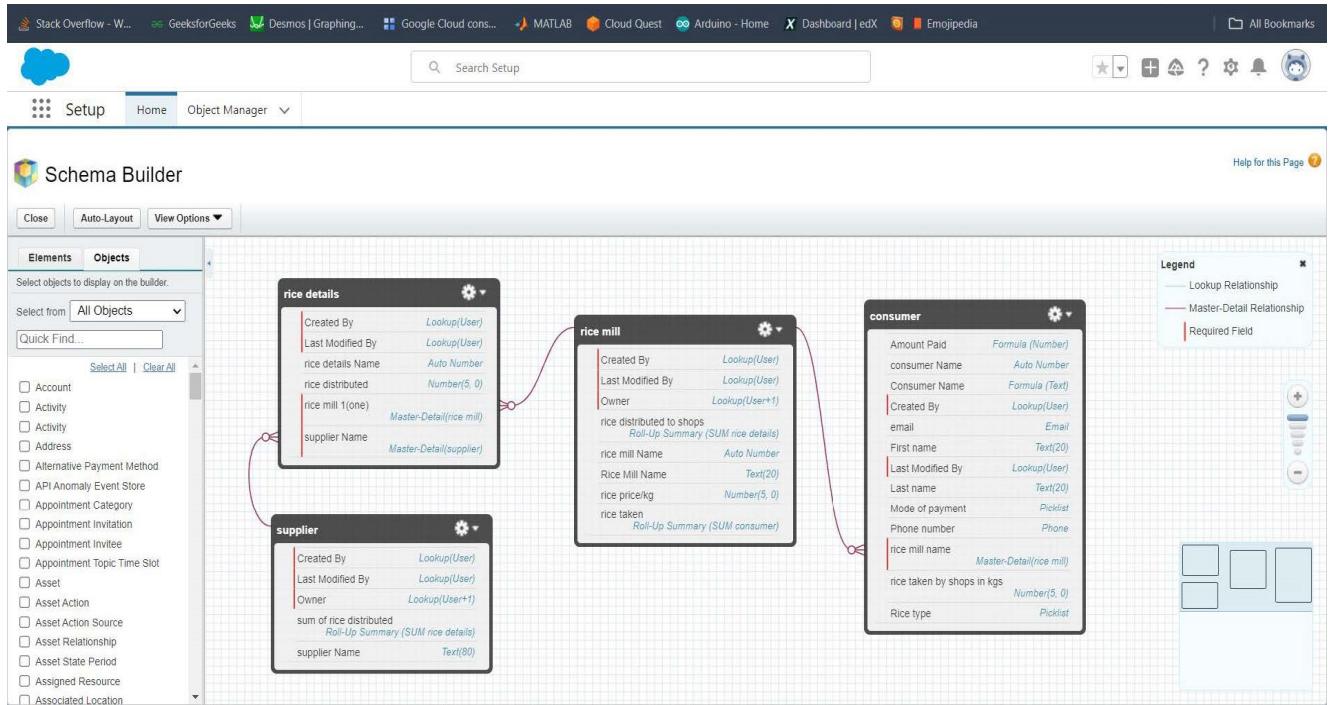
Task 4: The Lightning App

The screenshot shows the Salesforce Setup interface with the 'Lightning Experience App Manager' page selected. The table lists various apps, and the 'MY RICE' app is highlighted with a red border.

App Name	Developer Name	Description	Last Modified	Type
Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	28/12/2023, 12:16 pm	Lightning
Queue Management	QueueManagement	Create and manage queues for your business.	28/12/2023, 12:16 pm	Lightning
Platform	Platform	The fundamental Lightning Platform	28/12/2023, 12:16 pm	Classic
Organization Management	Organization_App		10/05/2024, 8:00 pm	Lightning
MY RICE	MY_RICE		14/06/2024, 9:21 am	Lightning
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	28/12/2023, 12:16 pm	Classic
Lightning Usage App	LightningInstrument...	View Adoption and Usage Metrics for Lightning Experience	28/12/2023, 12:16 pm	Lightning
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	28/12/2023, 12:16 pm	Lightning
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	28/12/2023, 12:16 pm	Lightning
Content	Content	Salesforce CRM Content	28/12/2023, 12:16 pm	Classic
Community	Community	Salesforce CRM Communities	28/12/2023, 12:16 pm	Classic
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	28/12/2023, 12:18 pm	Lightning

Activity : Create a Lightning App - My Rice.

Task 5: Fields & Relationships



Activity: All fields and relationships With Schema Builder

Task 6: Page Layouts

The screenshot shows the Object Manager for the **consumer** object. The left sidebar lists various layout options: Details, Fields & Relationships, Page Layouts (which is selected), 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 area displays the **Layout Properties** for the Page Layout. It includes a toolbar with Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties buttons. A table for **Fields** lists fields like Consumer Name, Last Modified By, rice mill name, First name, Last name, rice taken by shop..., Amount Paid, email, Mode of payment, Rice type, consumer Name, and First name.

The page layout itself is divided into sections:

- Personal details**: Fields: First name (Sample Text), Last name (Sample Text), Consumer Name (Sample Text). Values: Phone number (1-415-555-1212), Email (sarah.sample@company.com), Rice mill name (Sample Text).
- rice details**: Fields: rice taken by shops in kgs (54.069), Rice type (Sample Text).
- Receipt details**: Fields: Mode of payment (Sample Text), Amount Paid (396.23).
- Information**: Header: Information (Header visible on edit only). Fields: consumer Name (GEN-2004-001234).
- System Information**: Header: System information (Header visible on edit only).

Activity: creating a page layout for Consumer object

Activity: How page layout look like in action

Task 7: Profiles

	Visible	Default		Visible	Default
All Tabs (standard_AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	Queue Management (standard_QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard_Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard_LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard_AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard_Sales)	<input type="checkbox"/>	<input checked="" type="radio"/>
Automation (standard_FlowsApp)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard_LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard_LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard_Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard_Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup	<input type="checkbox"/>	<input type="radio"/>

Profile: Owner profile and all permissions

Profile: Employer profile and all permissions

Search Setup

SETUP Profiles

Contact Point Addresses Contact Point Consents Contact Point Emails

Push topics Sellers Streaming Channels User External Credentials

Custom Object Permissions

	Basic Access					Data Administration						
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
consumers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Departments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login

Password Policies

User passwords expire in: 90 days
Enforce password history: 3 passwords remembered
Minimum password length: 8

Profile: worker profile and all permissions

Task 8: Role & Role Hierarchy

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

- KIT University
 - CEO** [Edit](#) | [Del](#) | [Assign](#)
 - CFO** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - COO** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - owner** [Edit](#) | [Del](#) | [Assign](#)
 - employer** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - worker** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - SVP.Customer Service & Support** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - SVP.Human Resources** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - SVP.Sales & Marketing** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**

Activity: Assigning Roles: Owner, Employer, Worker

Task 9: User

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 View

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Akash	akas	matianimesh08@gmail.com			Associate Software Engineer
Edit	Aman	aman	matianimesh07@gmail.com			Sr. Manager
Edit	Chatter Expert	Chatter	chatty0005g00000b4feat.twwewgvryjox@chatter.salesforce.com			Chatter Free User
Edit	Mati Animesh	amat	animeshdev770@gmail.com	CEO		System Administrator
Edit Login	r@.ragu	r@	ragu123@gmail.com	worker		Standard Platform User
Edit Login	ram_ram	ram	ram123@gmail.com	employer		Standard Platform User
Edit Login	Sashank	sash	matianimesh08@gmail.com			Associate Software Engineer
Edit	User_Integration	integ	integration@005g00000l0afheat.com			Analytics Cloud Integration User
Edit	User_Security	sec	info@nsecuritv.com@005g00000l0afheat.com			Analytics Cloud Security User
Edit Login	y_vicky	yx	vicky123y@gmail.com	owner		owner

Activity: Creating Users: Vicky y(Owner), Ram Ram(Employer), Ragu Raj(Worker)

Task 10: Setting OWD

Work Step Template Private ✓

Work Type Private ✓

Work Type Group Public Read/Write Private ✓

Activity Controlled by Parent Controlled by Parent

consumer Controlled by Parent Controlled by Parent

Department Public Read/Write Private ✓

Employee Public Read/Write Private ✓

Project Public Read/Write Public Read/Write ✓

Project task 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

Secure guest user record access

Require permission to view record names in lookup fields

Activity: Creating OWD Setting.

Task 11: Report

Report: rice mills with consumers
range of amount per day

	consumer: consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
10	67		3,484.00		
Subtotal					67
4 (4)	consumers-002	normal rice	67	UPI	268.00
	consumers-011	normal rice	67	Cash	268.00
	consumers-010	basmati	67	Credit card	268.00
	consumers-003	basmati	67	UPI	268.00
Subtotal					1,072.00
5 (3)	consumers-005	normal rice	67	Credit card	335.00
	consumers-009	normal rice	67	Cash	335.00
	consumers-004	normal rice	67	UPI	335.00
Subtotal					1,005.00
6 (1)	consumers-006	normal rice	67	Net banking	402.00
Subtotal					402.00
7 (1)	consumers-008	normal rice	67	-	469.00
Subtotal					469.00

Row Counts Detail Rows Subtotals Grand Total

Activity: Create Report – New Consumer's purchase

Edit Subscription

Time: 11:00 am

Attachment: [Attach File](#)

Recipients:

Send email to: Me

Run Report As:

Me

Another Person

Animesh Maiti

Cancel Save

range of amount per day

As of 22/9/24 at 11:00 AM · Viewing as Animesh Maiti

OPEN IN SALESFORCE

Total Records	Total rice price/kg	Total Amount Paid
10	67	3,484.00

rice taken by shops in kgs ↑	consumer: consumer Name	Rice type	rice price/kg Sum	Mode of payment	Amount Paid Sum
4 (4 records)	consumers-002	normal rice	67	UPI	268.00
	consumers-003	basmati	67	UPI	268.00
	consumers-011	normal rice	67	Cash	268.00
	consumers-010	basmati	67	Credit card	268.00

Activity: Sharing report to owner

REPORTS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	Einstein Bot Reports	Automated Process	28/12/2023, 12:16 pm	Automated Process	28/12/2023, 12:16 pm
Created by Me	Einstein Bot Reports Spring '23	Automated Process	28/12/2023, 12:16 pm	Automated Process	28/12/2023, 12:16 pm
Private Reports	Einstein Bot Reports Summer '23	Automated Process	28/12/2023, 12:16 pm	Automated Process	28/12/2023, 12:16 pm
Public Reports	Einstein Bot Reports Summer '22	Automated Process	28/12/2023, 12:16 pm	Automated Process	28/12/2023, 12:16 pm
All Reports	Einstein Bot Reports Winter '23	Automated Process	28/12/2023, 12:16 pm	Automated Process	28/12/2023, 12:16 pm
	estimated rice per day	Animesh Maiti	16/6/2024, 11:33 am	Animesh Maiti	16/6/2024, 11:33 am

Activity: Create Report Folder: 'estimated rice per day' and move Report: 'range of amount per day' into the folder

Task 12: Dashboard

The screenshot shows a web-based dashboard management application. At the top, there is a navigation bar with links to various websites like Stack Overflow, GeeksforGeeks, Desmos, Google Cloud, MATLAB, Cloud Quest, Arduino, and edX. Below the navigation bar is a search bar labeled "Search...". The main area is titled "Dashboards All Folders" and shows a table with one item: "amount data dashboard" created by Animesh Maiti on 16/6/2024, 11:36 am, last modified by Animesh Maiti on 16/6/2024, 11:36 am. On the left side, there is a sidebar with categories: Dashboards, Folders, Favorites, and All Favorites. The "All Folders" section is currently selected and highlighted in blue.

Activity: Create Dashboard Folder: amount data dashboard

The screenshot shows a dashboard titled "amount data dashboard". It includes a message indicating it was last refreshed 101 days ago and a note to refresh for the latest data. The dashboard displays two charts: a bar chart titled "range of amount per day" and a donut chart titled "rice taken by shops in kgs". The bar chart shows the sum of amount paid for different ranges of rice taken by shops in kilograms. The donut chart shows the distribution of rice taken by different numbers of shops. A legend indicates the number of shops: 4 (green), 5 (orange), 6 (blue), 7 (red), and 8 (purple).

Activity: Create Dashboard: amount data dashboard

Task 13: Apex

The screenshot shows the Salesforce Setup interface under the Apex Classes section. The left sidebar includes links for Email, Custom Code, Data Classification, and Apex Classes. The main content area displays a table of Apex classes with columns for Action, Name, Namespace Prefix, API Version, Status, Size Without Comments, Last Modified By, and Has Trace Flags. A specific row for 'ConsumerRecord' is highlighted with a red box. The URL in the address bar is <https://kaituniversity163-dev-ed.lightning.force.com/lightning/setup/ApexClasses/h...>.

Activity: Creating Apex Class : ConsumerRecord

The screenshot shows the Salesforce Setup interface under the Apex Triggers section. The left sidebar includes links for Chatter, Groups, Triggers, Service, Topics, Objects and Fields, and Custom Code. The main content area displays a table of Apex triggers with columns for Action, Name, Namespace Prefix, sObject Type, API Version, Status, Size Without Comments, Last Modified By, and Has Trace Flags. A specific row for 'consumerTrigger' is highlighted with a red box. The URL in the address bar is <https://kaituniversity163-dev-ed.lightning.force.com/lightning/setup/ApexTriggers/h...>.

Activity: Creating Apex Trigger: consumerTrigger

Thank You

I truly enjoyed building this project and learned a great deal throughout the process. Thank you, SmartBridge and Salesforce, for giving me this incredible opportunity to grow and develop my skills!