CRM Application for Wholesale Rice Mill

Leveraging Salesforce to Improve Efficiency in Rice Mill Operations

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Abstract

This report introduces a robust CRM system designed to enhance daily operations within a wholesale rice mill. The application leverages Salesforce to deliver comprehensive reports, summary fields, cross-object formula fields, validation rules, and permission sets, all aimed at boosting efficiency and optimizing resource management.

Introduction

The wholesale rice milling industry encounters multiple challenges related to operational management, customer engagement, and reporting. This project aims to create a powerful CRM application using Salesforce, simplifying the management of daily rice production, sales, and analytics. By harnessing the capabilities of Salesforce, the application enhances customer satisfaction, improves store processes, and increases overall productivity in the rice mill.

Project Objectives

-> Develop an intuitive CRM application.
->Streamline daily operations and reporting.
->Improve customer experiences and optimize resource management.

Description

The application is built on the Salesforce platform, employing custom objects, fields, and

relationships for efficient data management. The system architecture includes:

Custom Objects: Supplier, Rice Mill, Consumer, Rice Information

Fields: Numeric fields, rollup summary fields, cross-object formula fields

Relationships: Master-Detail relationships

User Interface: Custom Tabs, Page Layouts, Lightning Application

Security: Validation Rules, Permission Sets

Features and Functionality

- Reporting and Dashboards

The system generates comprehensive reports and analytics on daily rice sales, overall income, revenue, popular offerings, and consumer purchasing trends. These insights enable the rice mill owner to analyze data, optimize resource usage, and make informed future decisions.

- Rollup Summary Fields

These fields consolidate data from child objects to parent objects in a master-detail relationship. They utilize COUNT, SUM, MIN, and MAX functions. For example, the system displays the total rice value supplied from the rice details object on the related supplier record.

- **Cross-Object Formula Fields**

Cross-object formula fields allow referencing fields from another Salesforce object. For instance, the system can calculate the total payment due by applying a formula: *Quantity of rice ordered* × *price per kilogram*.

- **Validation Rules**

Validation rules ensure data accuracy by displaying error messages when invalid inputs are entered. For instance, the IsBlank formula checks if a field is empty and generates an error message if necessary.

- **Permission Sets**

Organization-Wide Defaults (OWD) are employed to limit access. Roles are defined so that the owner has visibility into both employee and worker records, while employers can only view worker data.

Implementation Steps

- **Prerequisites**
  -> Salesforce Developer account
  -> Proficiency in Salesforce admin concepts
  -> Installation of two web browsers
  -> Reliable internet connectivity

Milestones and Activities

1. Create Developer Account

- Sign up for a Salesforce Developer account.

Sign up for your Salesforce Developer Edition

A Salesforce Platform environment for free.

Complete the form to get access to the Salesforce Developer Edition.

First Name*
WHOLESALE RICE

Last Name*
MILL

Email*
yashyad0614@gmail.com

Role*
Developer

Company*
LNCT

Country/Region*
India

State/Province*
Madhya Pradesh

Postal Code*
462022

Username
dev@ricemill.in

Password
••••••••

Log In

Remember me

Forgot Your Password?   Use Custom Domain

Not a customer?   Try for Free

2. Creating Objects

- Supplier Object: Manage supplier details.
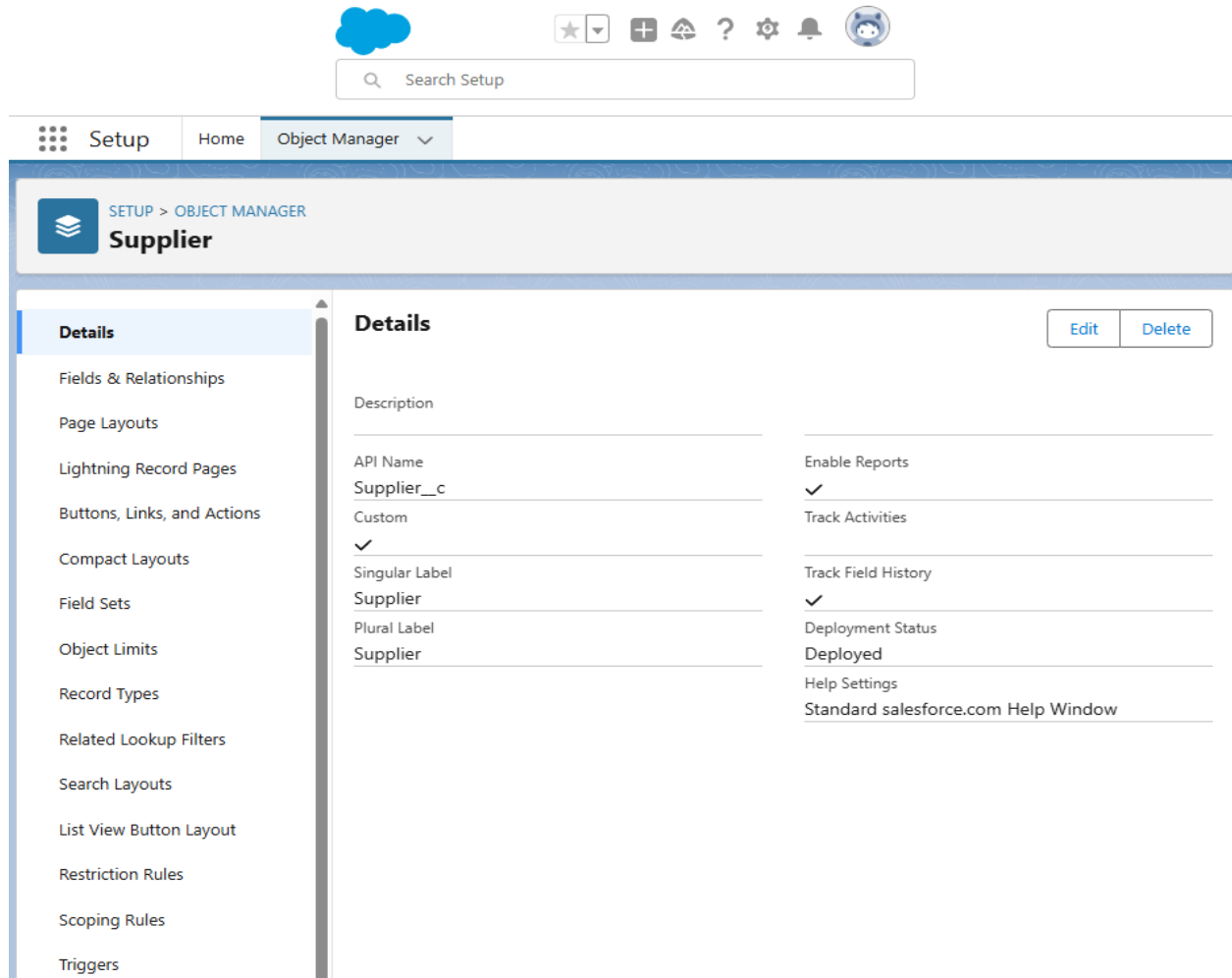
- Rice Mill Object: Manage rice mill details.

● Consumer Object: Manage consumer details.

Search Setup

SETUP > OBJECT MANAGER

Consumer

Details

- Details
- Fields & Relationships
- 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
- Restriction Rules
- Scoping Rules

Details

Edit | Delete

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

● Rice Details Object: Track rice production and sales.

3. Creating Tabs

• Create custom tabs for each object to easily access data.

4. Creating Lightning App

● Steps to create a Lightning app for the CRM application.

5. Creating Fields

● Number fields: Track quantities and prices.
● Rollup Summary Fields: Summarize data from child to parent objects.

● Cross-Object Formula Fields: Calculate total amounts.
● Validation Rules: Ensure data integrity.

6. Creating Page Layouts

● Customize page layouts for each object to enhance user experience.

7. Creating Profiles, Roles, and Role Hierarchy

- Define profiles to control user permissions.
- Create roles and set up a role hierarchy to establish data access levels.
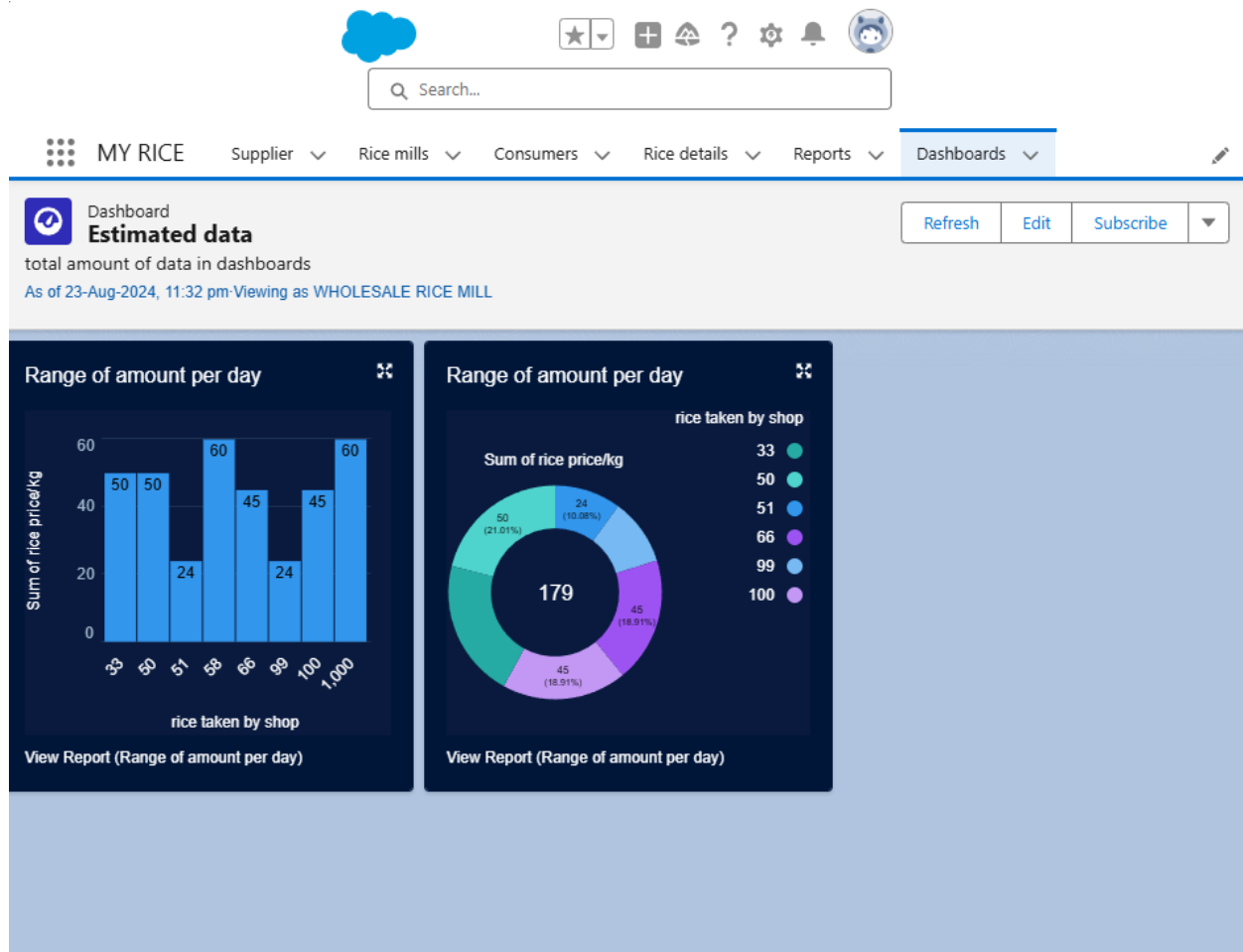
8. Creating Users

- Add users to the Salesforce organization and assign appropriate profiles and roles.

9. Creating Permission Sets

- Define permission sets to grant additional permissions to users beyond their profile.

10. Creating Reports

- Create detailed reports to track rice production, sales, and other key metrics.

Q Search...

Report: Rice mills with Consumers
Range of amount per day

✏ Enable Field Editing   Q   🔲 Add Chart   ▼   ↻   Edit ▼

Total Records	Total rice price/kg	Total Amount Paid
8	179	78,700.00

☐ rice taken by shop ↑ ▼	Consumer: Consumer Name ▼	Rice type ▼	rice price/kg ▼	Mode of payment ▼	Amount Paid ▼
☐ 33 (1)	Consumers-003	Basmati	50	-	1,650.00
Subtotal			50		1,650.00
☐ 50 (1)	Consumers-001	Basmati	50	credit card	2,500.00
Subtotal			50		2,500.00
☐ 51 (1)	Consumers-008	Basmati	24	upi	1,224.00
Subtotal			24		1,224.00
☐ 58 (1)	Consumers-006	Normal rice	60	network banking	3,480.00
Subtotal			60		3,480.00
☐ 66 (1)	Consumers-007	Basmati	45	-	2,970.00
Subtotal			45		2,970.00
☐ 99 (1)	Consumers-005	Normal rice	24	-	2,376.00
Subtotal			24		2,376.00
☐ 100 (1)	Consumers-002	Normal rice	45	upi	4,500.00
Subtotal			45		4,500.00
☐ 1,000 (1)	Consumers-004	Basmati	60	upi	60,000.00
Subtotal			60		60,000.00
Total (8)			179		78,700.00

Row Counts ✓○   Detail Rows ✓○   Subtotals ✓○   Grand Total ✓○

11. Creating Dashboards

  ● Design dashboards to provide visual summaries of key metrics and reports.

Conclusion

The CRM application successfully streamlines daily operations in the rice mill, enhancing efficiency and customer satisfaction. Future enhancements could include integrating the application with external systems for broader functionality.

References

- Salesforce Documentation
- Community Forums