A CRM APPLICATION FOR WHOLESALE RICE MILL

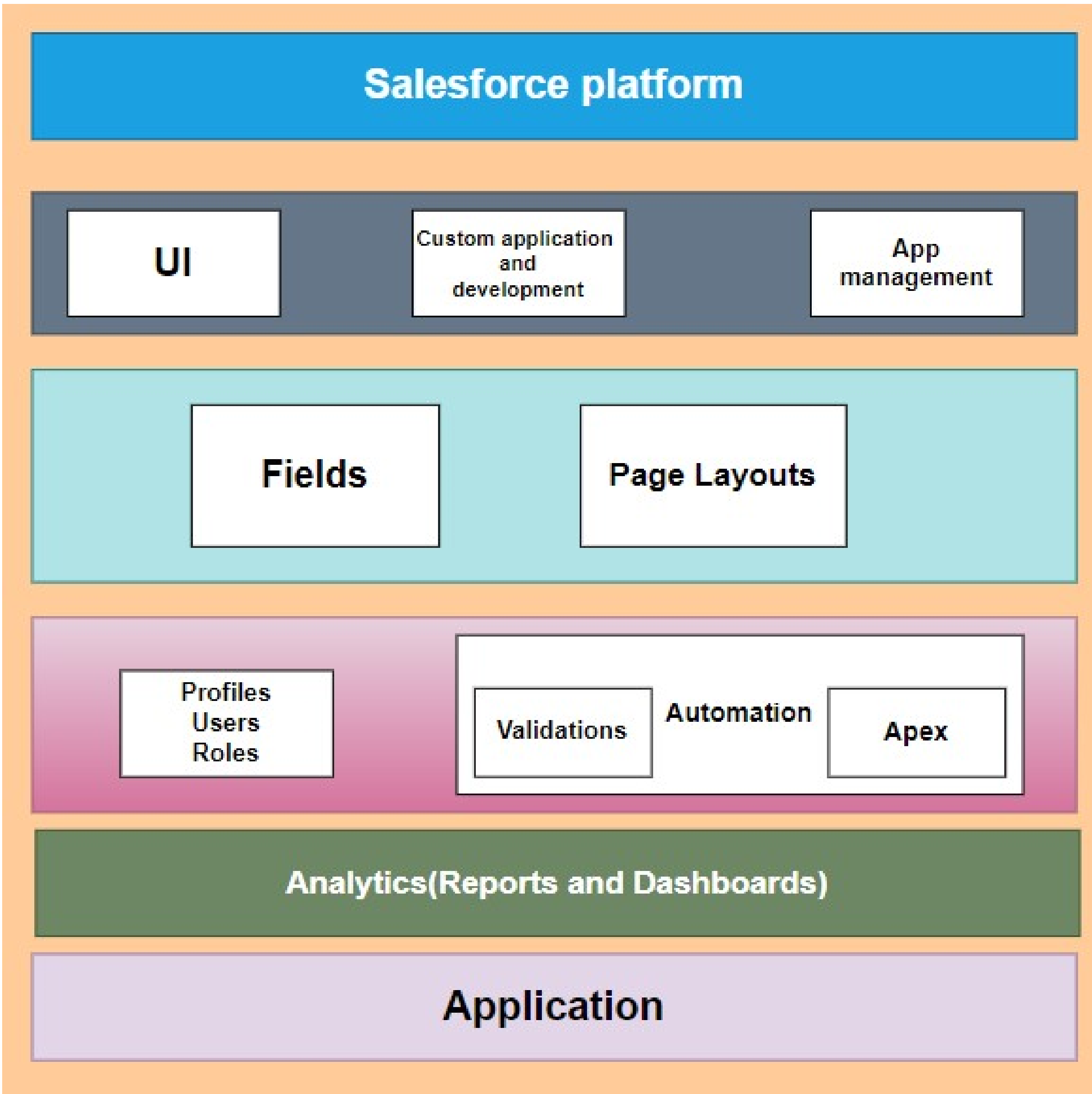
Short Description:

The Rice Mill Crm Streamlines Daily Rice Production and Sales Reporting,Enhancing Efficiency and Customer Experiences.

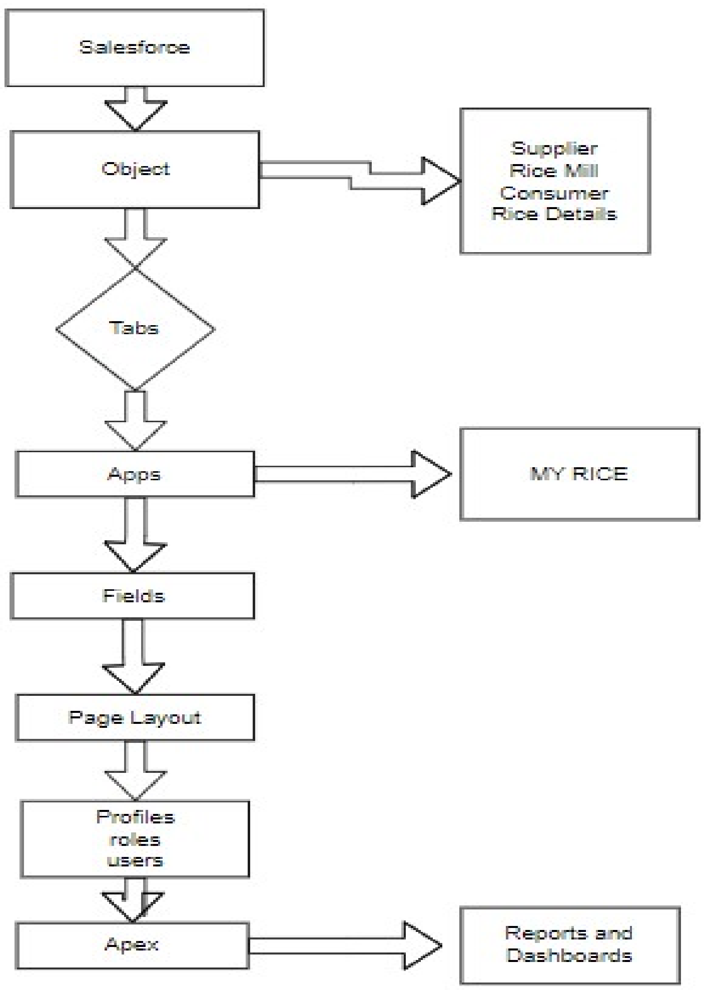
Long Description:

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.

Technical Architecture:



Project Flow:



Features and Functionality:

Reports 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 buyed customers. Easy to understand the data to the owner, improving resource allocation, and planning future development.

Roll Up 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.

Cross Object Formula: 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 rice taken*price/kg and it displays the total amount I have to pay.

Validation Rule: 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.Isblank 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.

Pre-requisites
Salesforce Developer account
Knowledge of the salesforce admin concepts.
Installed with 2 web browsers in the Machine
Good internet connectivity.

What you'll learn

1. Real Time Salesforce Project
2. Object & Relationship in Salesforce
3. Formula fields and Validation rules.
4. Cross object formula fields.
5. Page layouts.

6. Rollup summary fields.
7. Reports and dashboards

Milestones and Activities:

<u>Milestone 1-Salesforce</u> :

Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.
Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?".

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Activity 1: Creating Developer Account:

Activity 2: Account Activation:

<u>Milestone 2-Object</u>

What Is an 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.

Activity 1: Create Supplier Object:

Activity 2: Create Rice mill Object:

Activity 3: Create consumer Objects:

Activity 4: Create rice details Objects:

Milestone 3-Tabs

What is Tab : A tab is like a user interface that is used to build records for objects and to view the records inthe objects.

Types of Tabs:

1. **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.

2. **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.

1. **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.

2. **Lightning Component Tabs**

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

3. **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.

Activity 1: Creating a Custom Tab

Activity 2: Creating Remaining Tabs

Milestone 4- 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.

Activity 1: Create a Lightning App

Milestone 5 : 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 astandard task. The main point is that you can’t simply delete a Standard Field until it is anon-required standard field. Otherwise, users have the option to delete them at any point fromthe application freely. Moreover, we have some fields that you will find common in everySalesforce application. They are,

- Created By
- Owner
- Last Modified
- Field Made During object Creation

Custom Fields:

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

Activity 1: Creating the number field in rice details object

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

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Activity 4 : Creating the Roll-up Summary

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Activity 5 : Creating Fields in Objects

Activity 6: Creating Fields in rice mill Objects

Activity 7: Creating Fields in consumer Objects

Activity 8 : Creating Cross Object Formula Field in consumer Object

Activity 9 : Creating the validation rule

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.

Milestone 6 : 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.

Activity 1 : creating the page layout

Milestone 7 : 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

1. **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.

2. **Custom Profiles:**
   Custom ones defined by us.
   They can be deleted if there are no users assigned with that particular one.

Activity 1: owner Profile

Activity 2: employer Profile

Activity 3: worker Profile

Milestone 8 : Role & 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.

Activity 1: Creating owner Role

Activity 2: Creating employer roles

Milestone 9 : Users

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

Activity 1: Create User

Activity 2: creating another users

Milestone 10 : 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.

Activity 1: Creating OWD setting.

Milestone 11 : 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 analyze 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 provide 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.

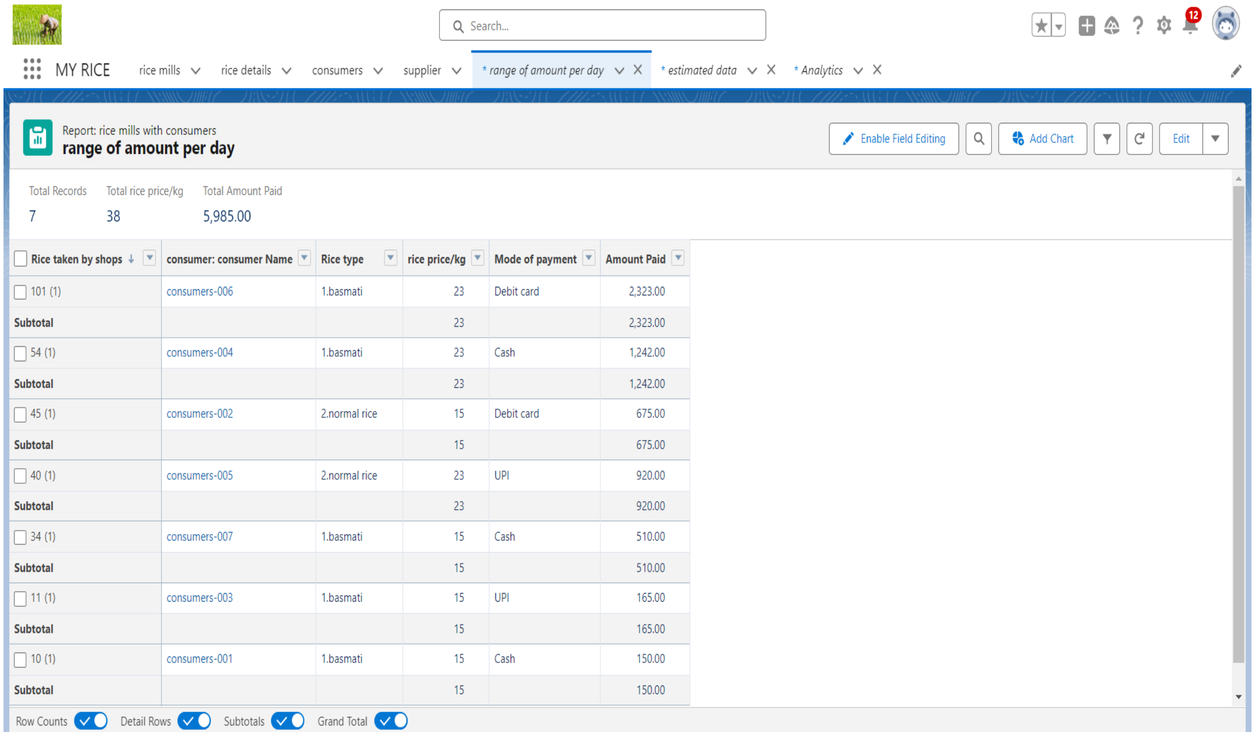
Example: All opportunities for your team sub totaled by Sales Stage and Owner.

3. Matrix Reports: This type of reports allow 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.

Activity 1: Create Report



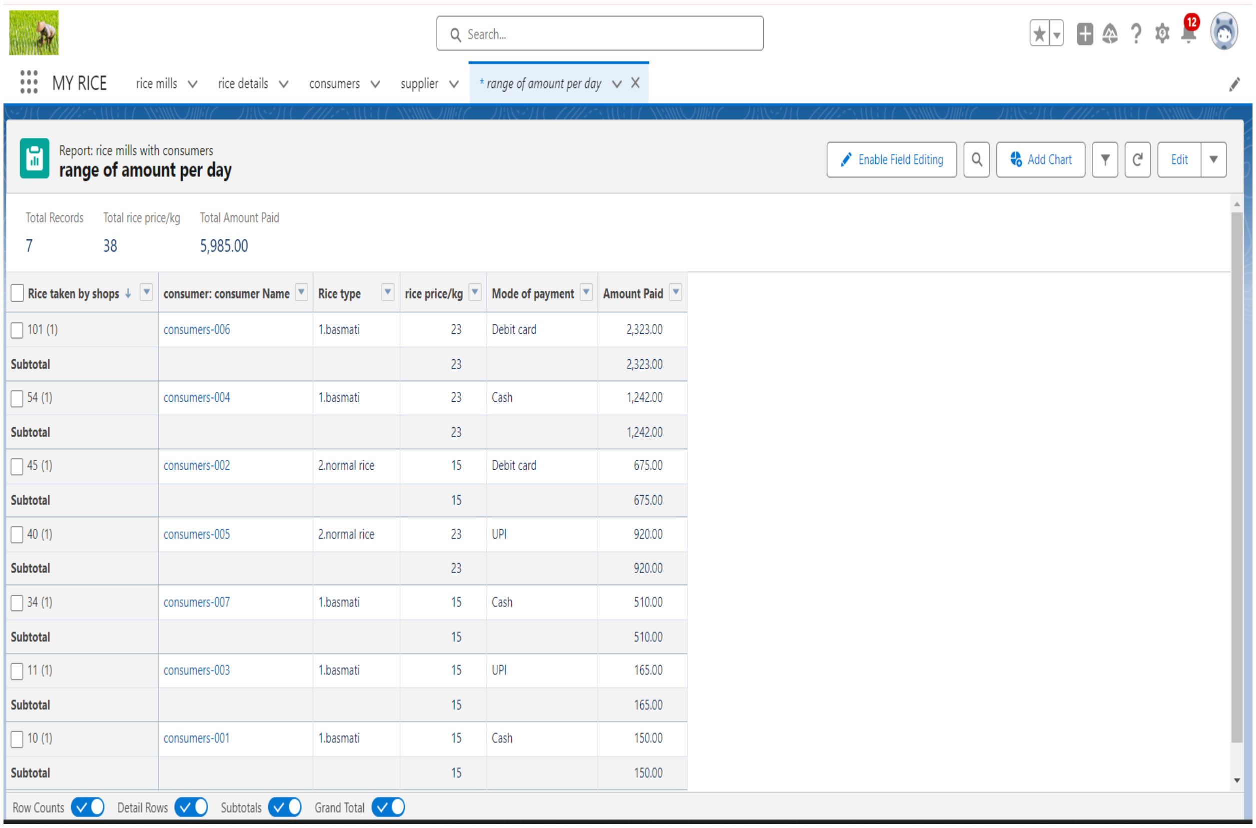
Report: rice mills with consumers
range of amount per day

Total Records	Total rice price/kg	Total Amount Paid
7	38	5,985.00

Rice taken by shops	consumer: consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
101 (1)	consumers-006	1.basmati	23	Debit card	2,323.00
Subtotal			23		2,323.00
54 (1)	consumers-004	1.basmati	23	Cash	1,242.00
Subtotal			23		1,242.00
45 (1)	consumers-002	2.normal rice	15	Debit card	675.00
Subtotal			15		675.00
40 (1)	consumers-005	2.normal rice	23	UPI	920.00
Subtotal			23		920.00
34 (1)	consumers-007	1.basmati	15	Cash	510.00
Subtotal			15		510.00
11 (1)	consumers-003	1.basmati	15	UPI	165.00
Subtotal			15		165.00
10 (1)	consumers-001	1.basmati	15	Cash	150.00
Subtotal			15		150.00

Activity 2: Sharing report to owner

Activity 3: create a report folder



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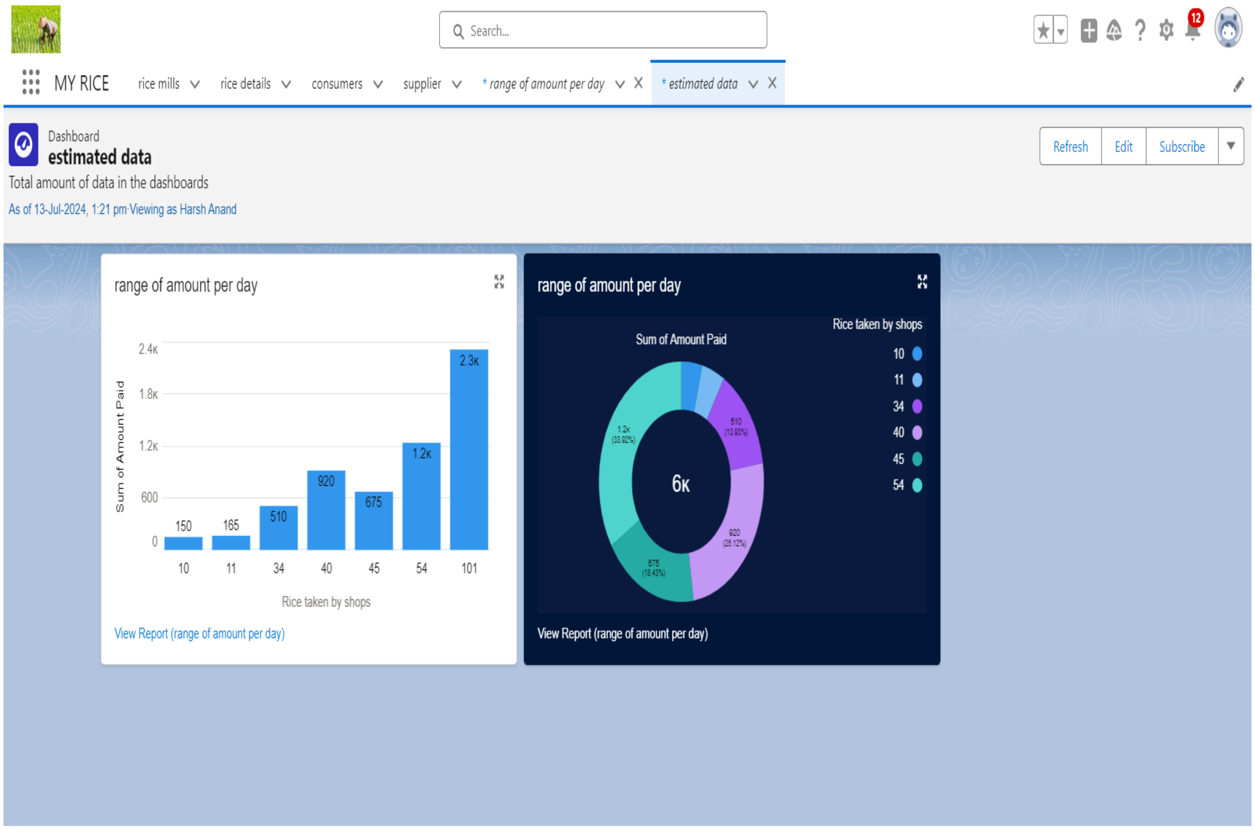
Subtotal			15		510.00
11 (1)	consumers-003	1.basmati	15	UPI	165.00
Subtotal			15		165.00
10 (1)	consumers-001	1.basmati	15	Cash	150.00
Subtotal			15		150.00

Milestone 12 : 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.

Activity 1: Create Dashboard Folder

Activity 2: Create Dashboard


Search...
MY RICE
rice mills
rice details
consumers
supplier
* range of amount per day
* estimated data
Dashboard
estimated data
Total amount of data in the dashboards
As of 13-Jul-2024, 1:21 pm·Viewing as Harsh Anand
Refresh
Edit
Subscribe
range of amount per day
Sum of Amount Paid
Rice taken by shops
View Report (range of amount per day)
range of amount per day
Sum of Amount Paid
6K
Rice taken by shops
View Report (range of amount per day)