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 userfriendly and feature-rich application that addresses the specific needs of a rice mill factory.

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.

**Milestone 1 - Introduction to Salesforce:**

What is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

Activity 1: Creating Developer Account:
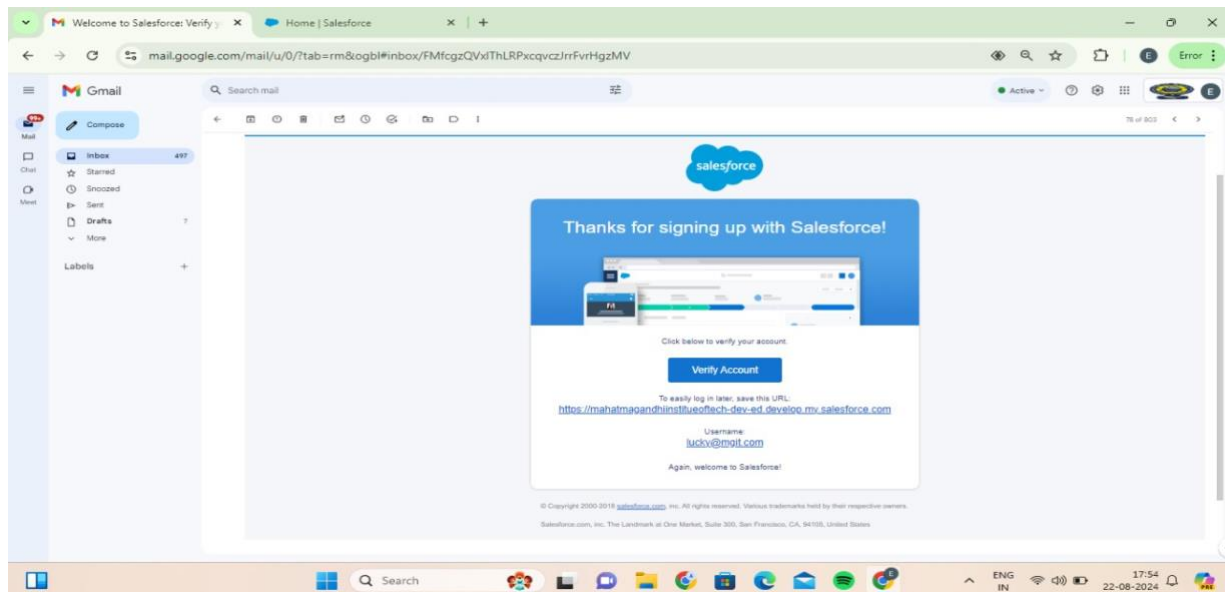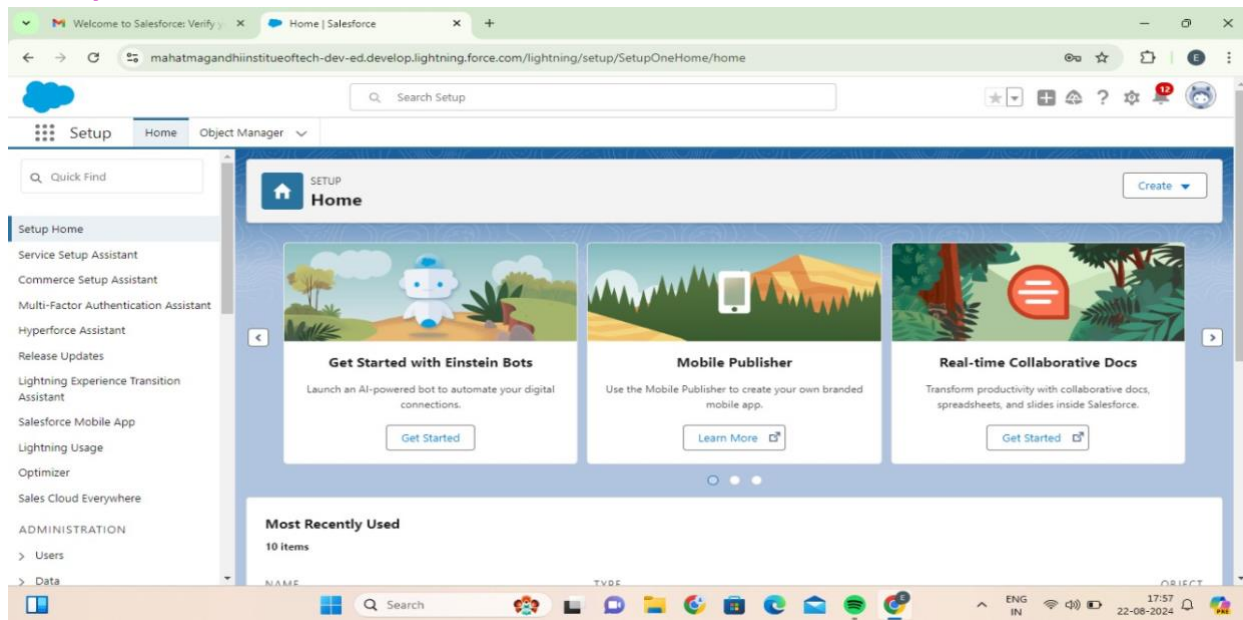
Milestone 2 - Object:

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:
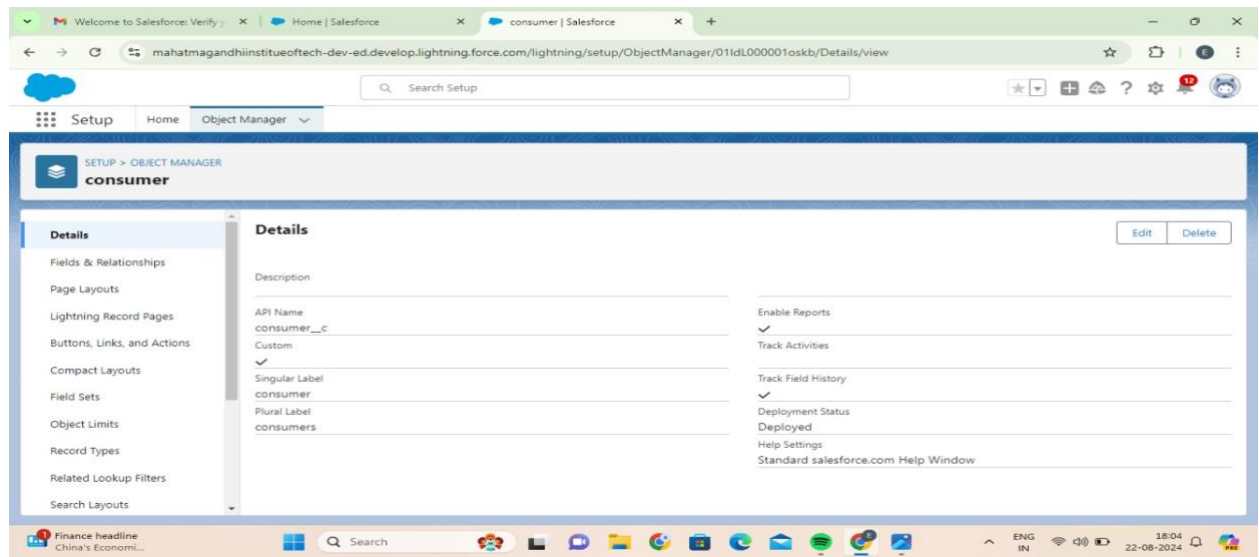
Activity 4: Create rice details Objects:
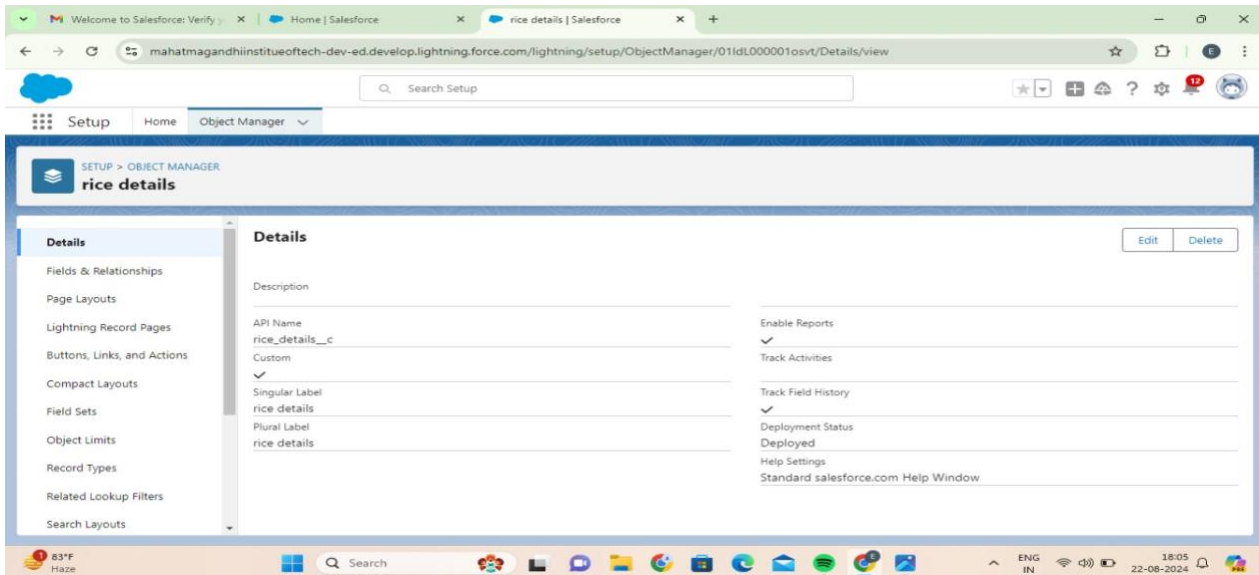

Milestone 3 - Tabs:

What is Tab?

A tab is like a user interface that is used to build records for objects and to view the records in the 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.

3.   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.

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

5.   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.
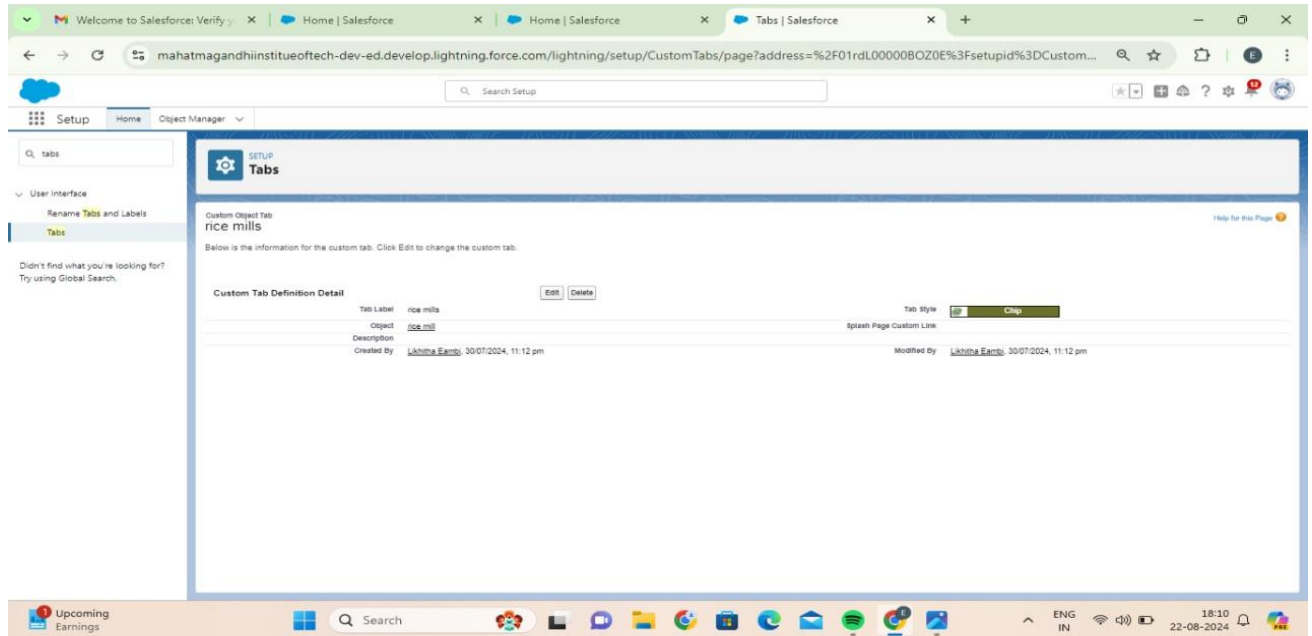
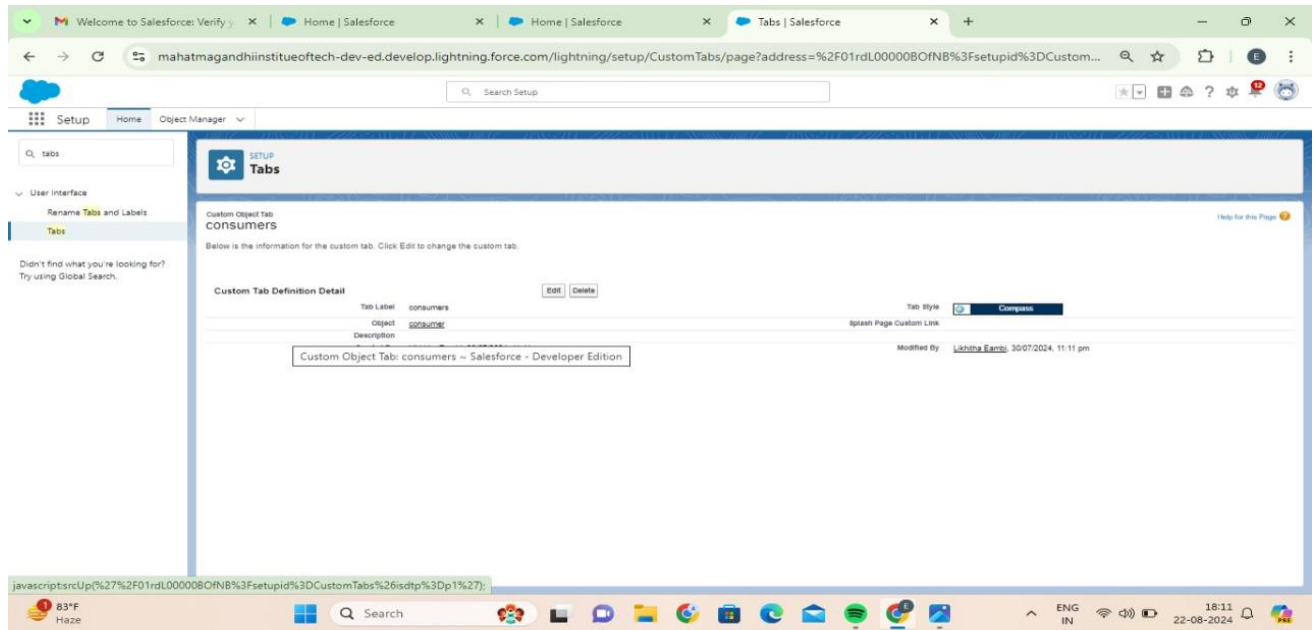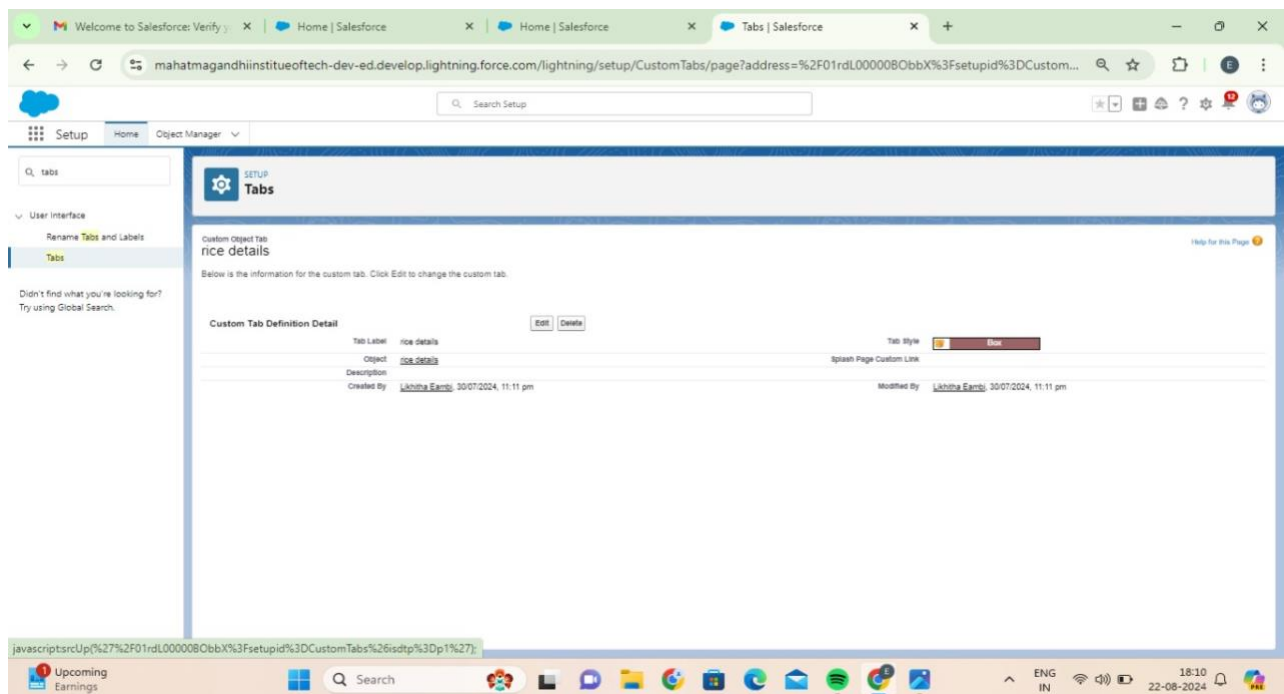**Activity 1: Creating a Custom Tab:**
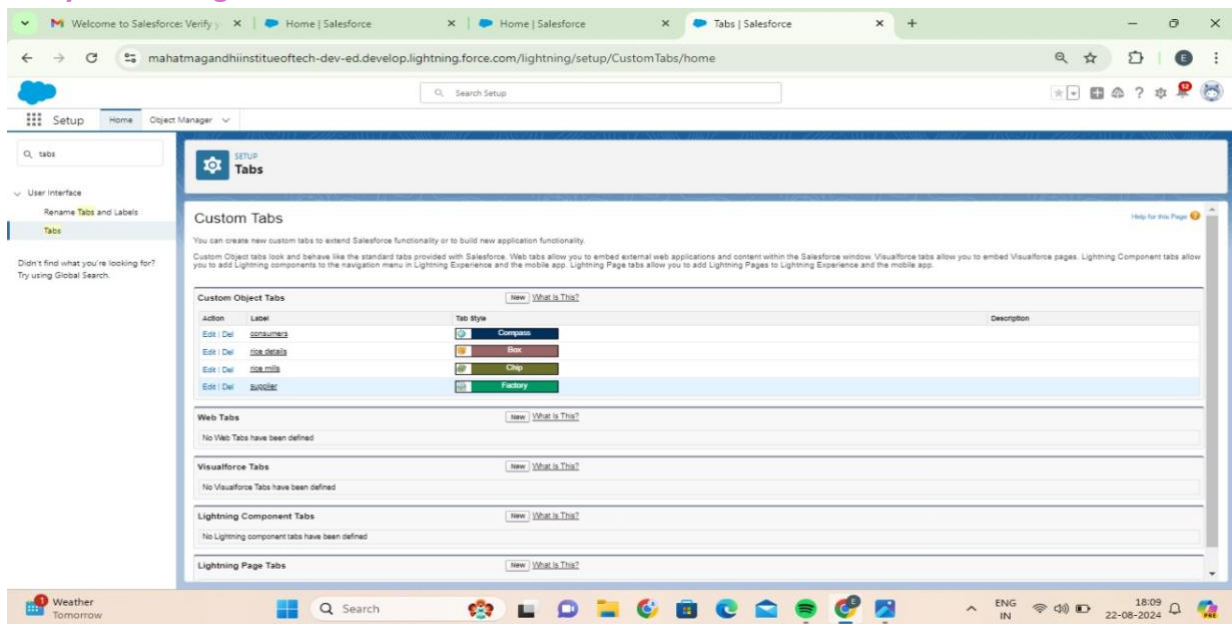
supplier Tab:
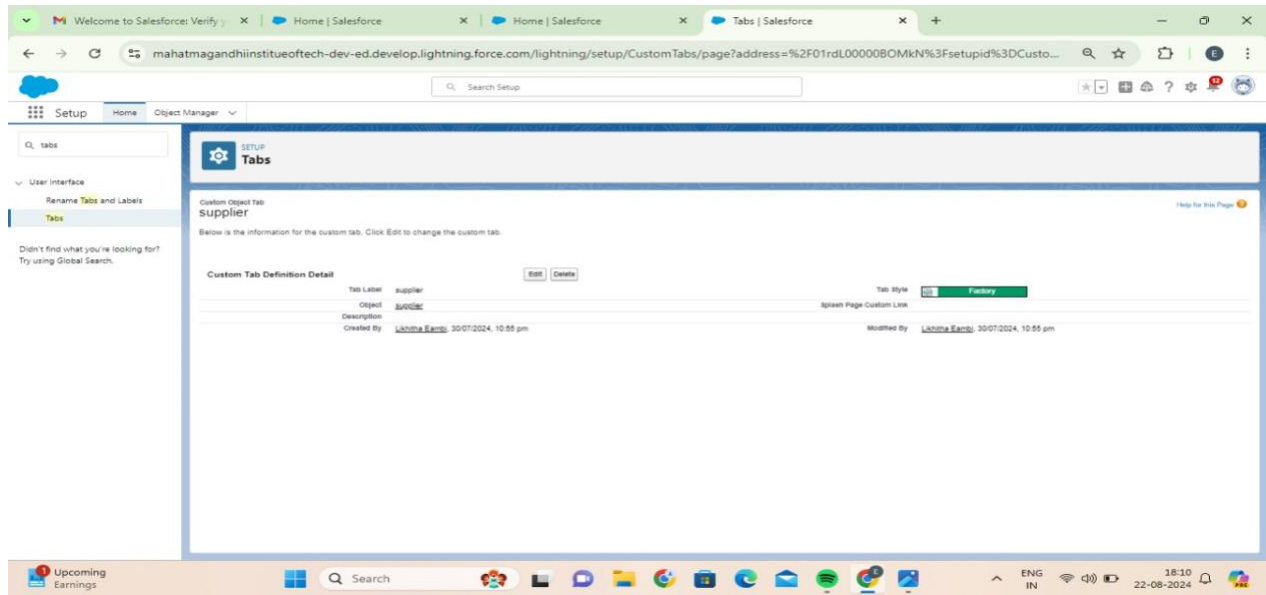
rice mill Tab:

consumer Tab:

rice details Tab:

Milestone 4 - The Lightning App:

An app is a collection of items that work together to serve a particular function.**Activity 1: Create a Lightning App:**

mahatmagandhiinstitueoftech-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02udL000005JvJ3QAK&retUrl=https%3A%2F%2Fmahatmag...

Lightning App Builder   App Settings   Pages ∨   MY RICE   ? Help

App Settings

App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name
MY RICE

*Developer Name
MY_RICE

Description
Enter a description...

App Branding

Image
Primary Color Hex Value
#007DD2

Clear

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

MY RICE

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mahatmagandhiinstitueoftech-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02udL000005JvJ3QAK&retUrl=https%3A%2F%2Fmahatmag...

Lightning App Builder   App Settings   Pages ∨   MY RICE   ? Help

App Settings

App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items   Create ▾

Type to filter list...

Accounts	
All Sites	
Alternative Payment Methods	
Analytics	
App Launcher	
Appointment Categories	
Appointment Invitations	
Approval Requests	
Asset Action Sources	
Asset Actions	
Asset State Periods	
Assets	
Async Operation Logs	

Selected Items

supplier	
rice mills	
consumers	
rice details	

Homestay 4B 5G
Internet access
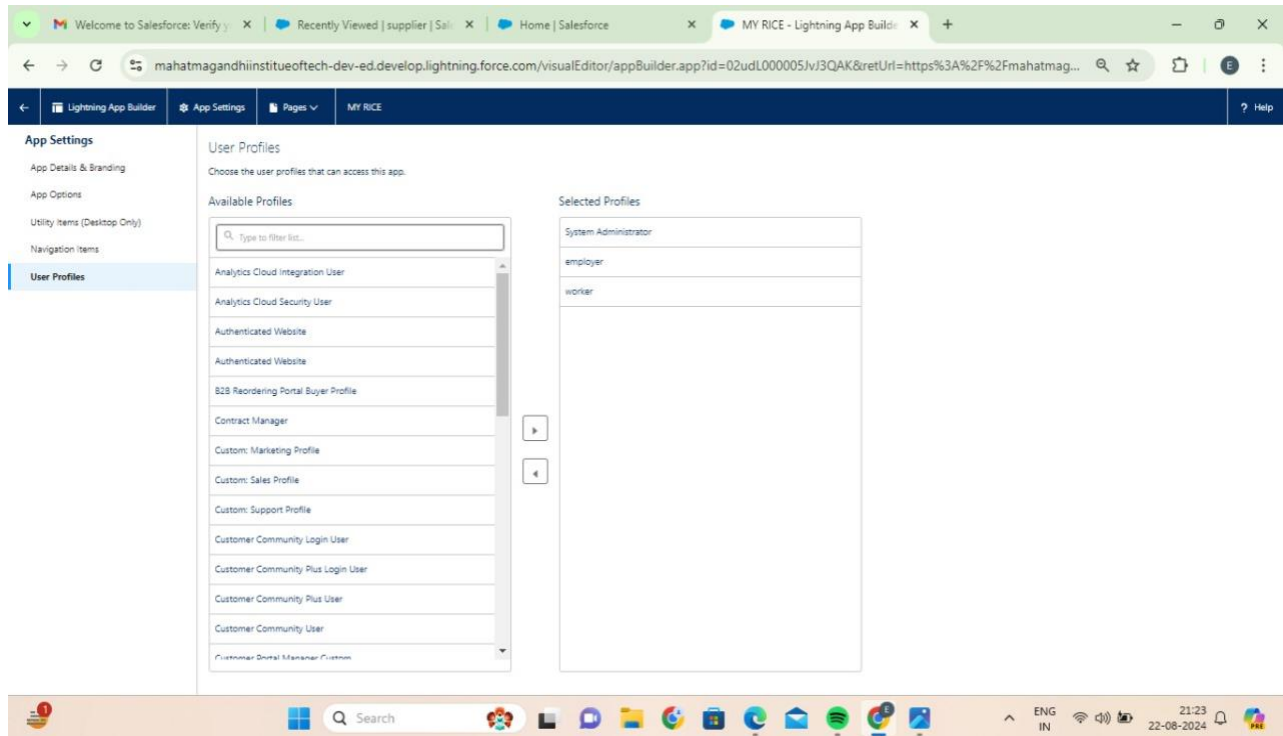
Milestone 5 - Fields:

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**

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 nonrequired 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,

● 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 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.

Creating The Fields In Rice Details Object:

Creating The Fields In Consumer Object:

Creating The Fields In Supplier Object:
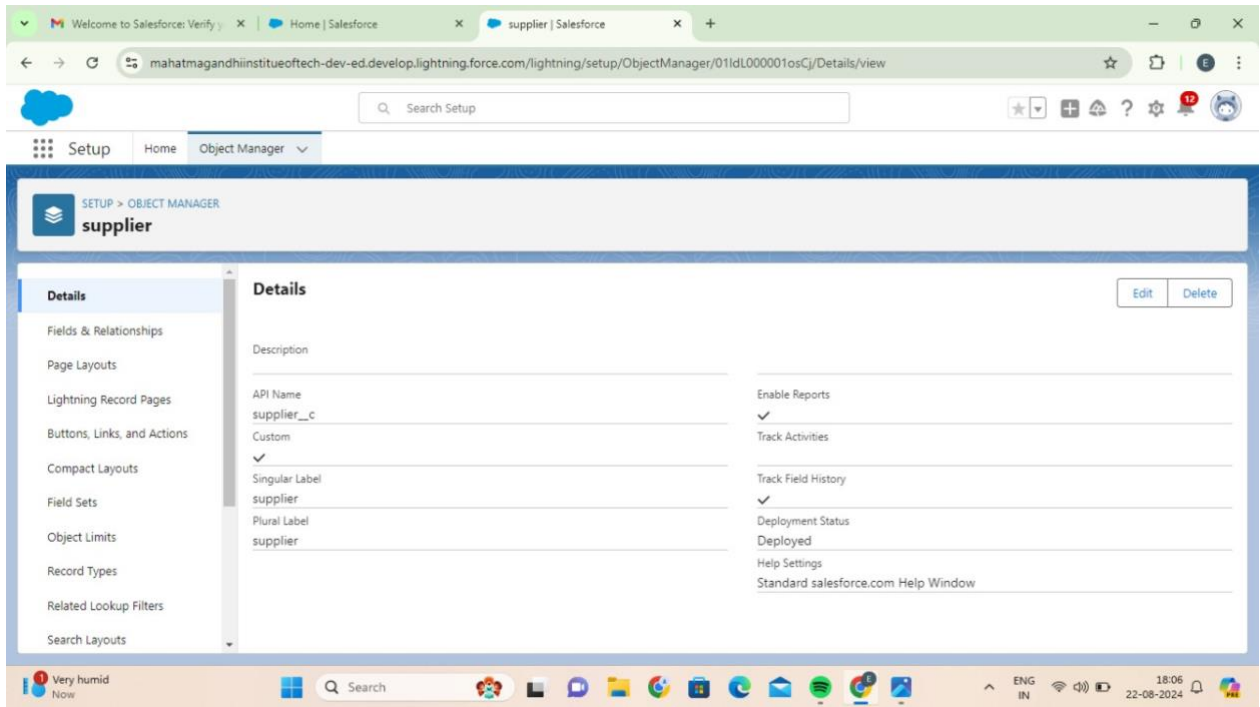
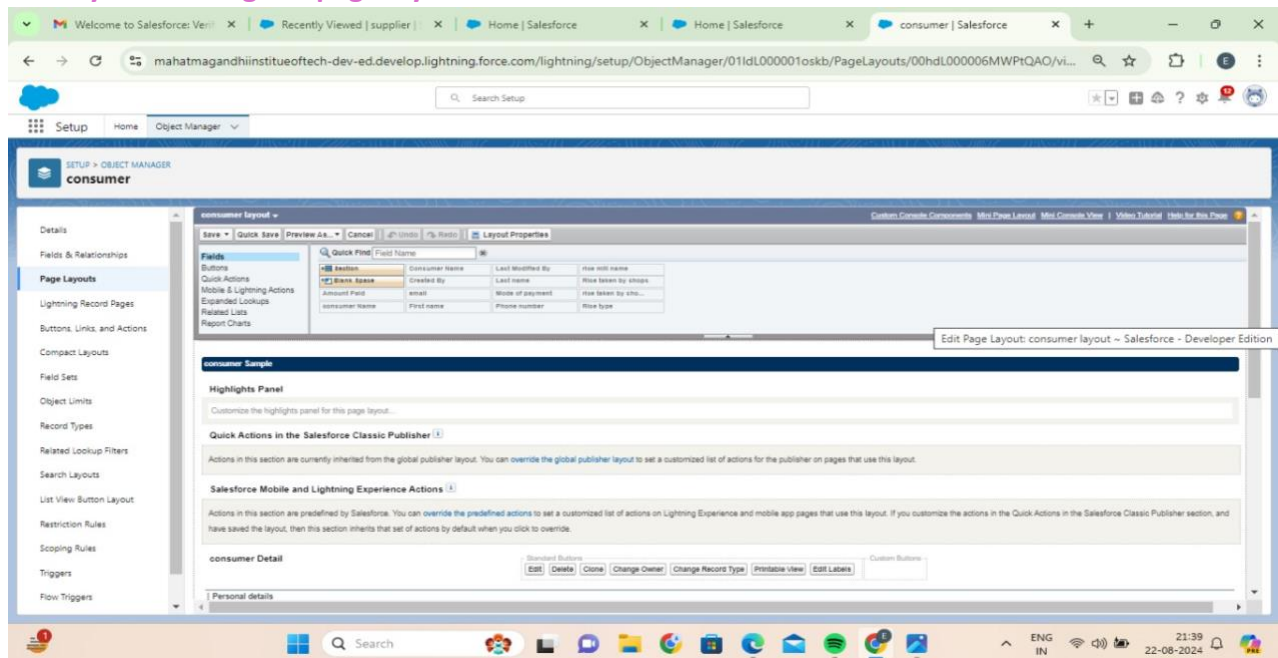## Creating The Fields In Rice Mill Object:
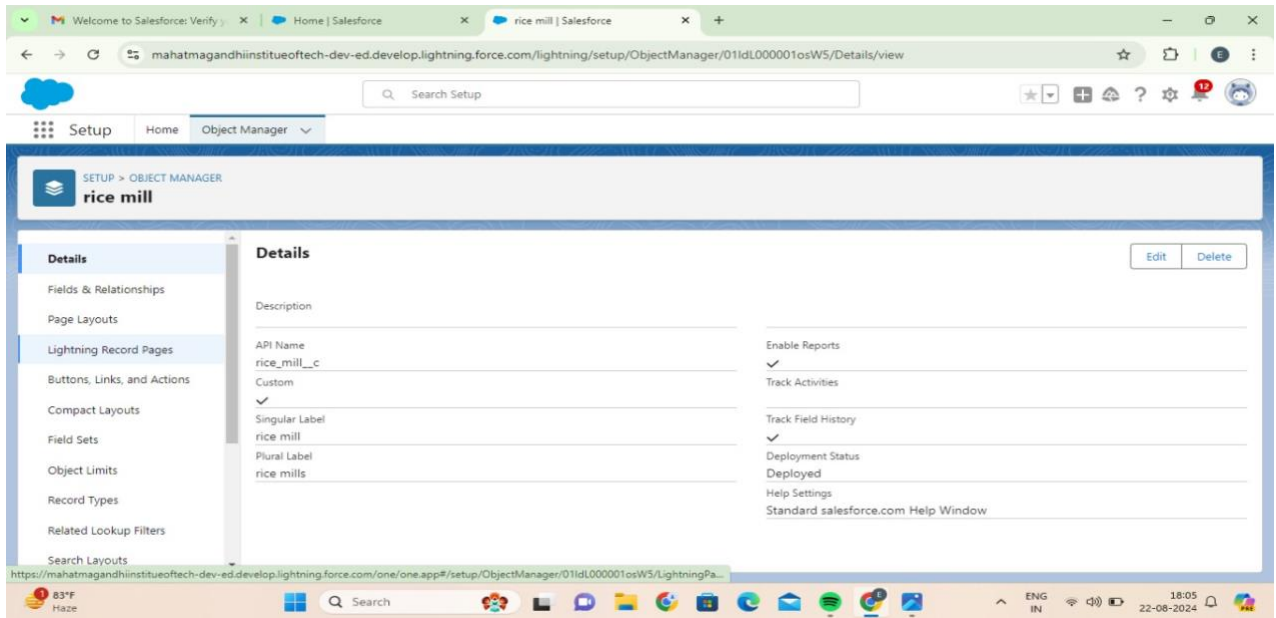
Creating The Validation Rule:
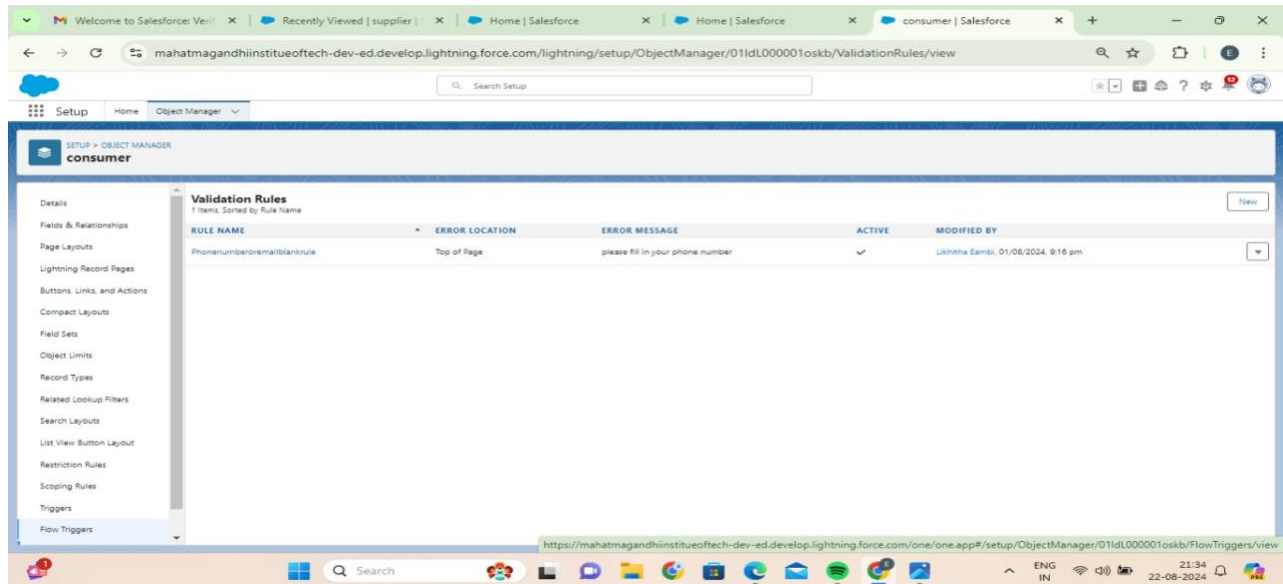
Milestone 6 : Page layouts:

Page Layout in Salesforce allows us to customize the design and organize detail and edit pages of records in Salesforce.

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.

● 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.
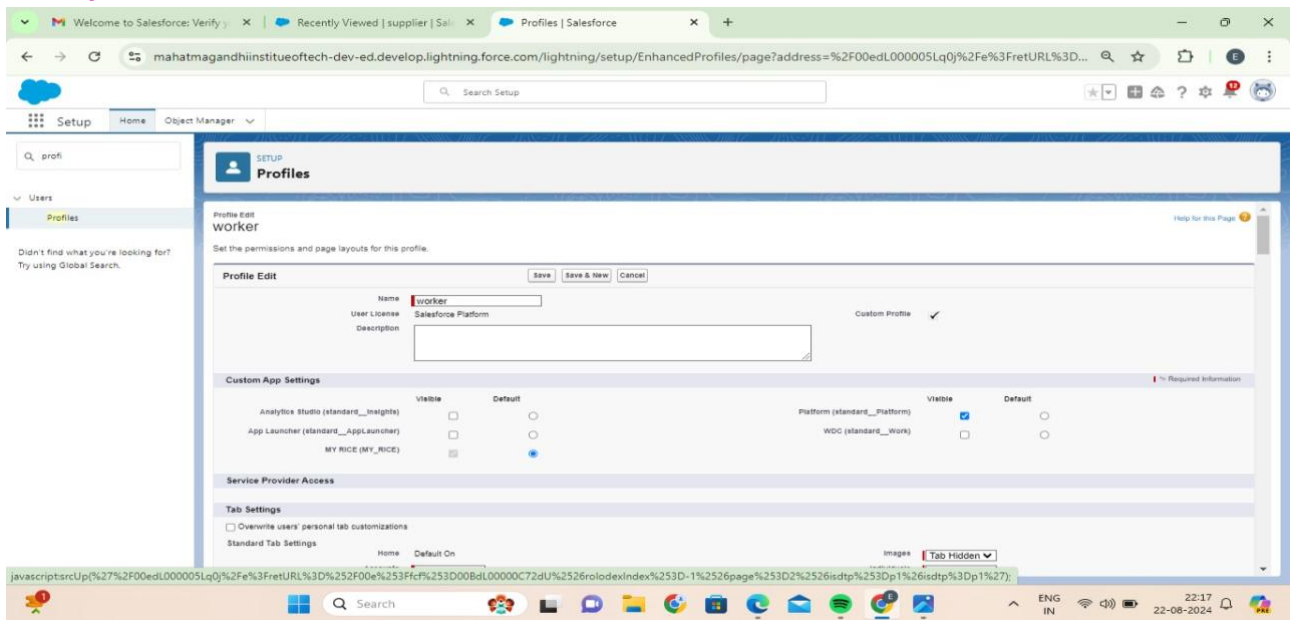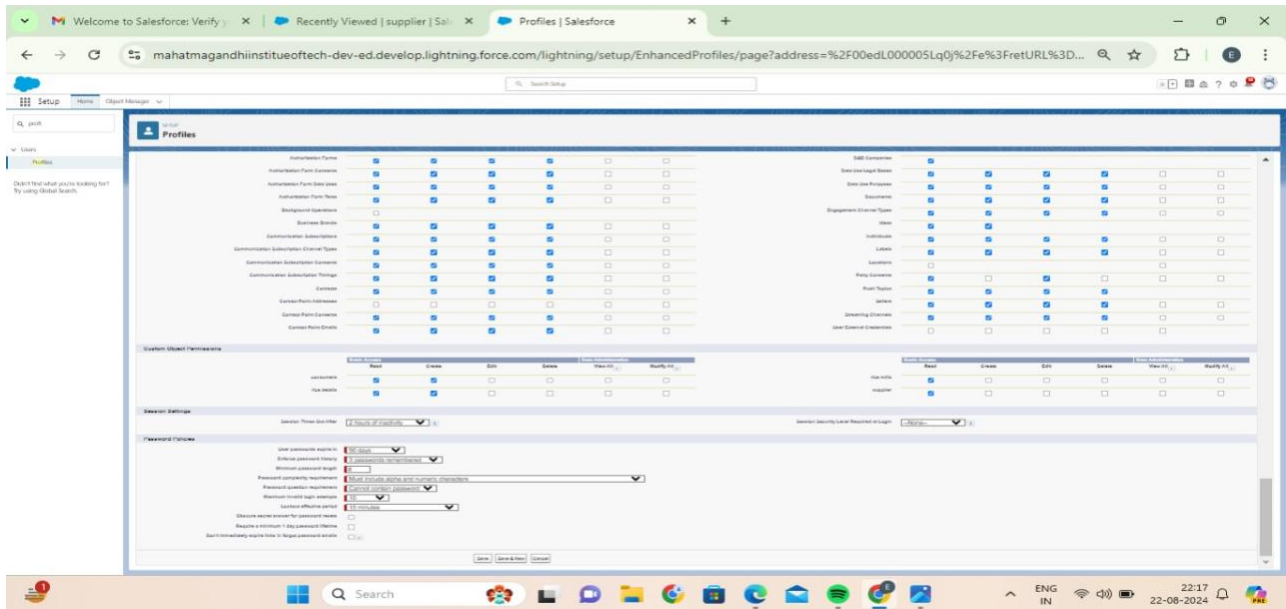
Activity 1: owner Profile:

Activity 2: employer Profile:
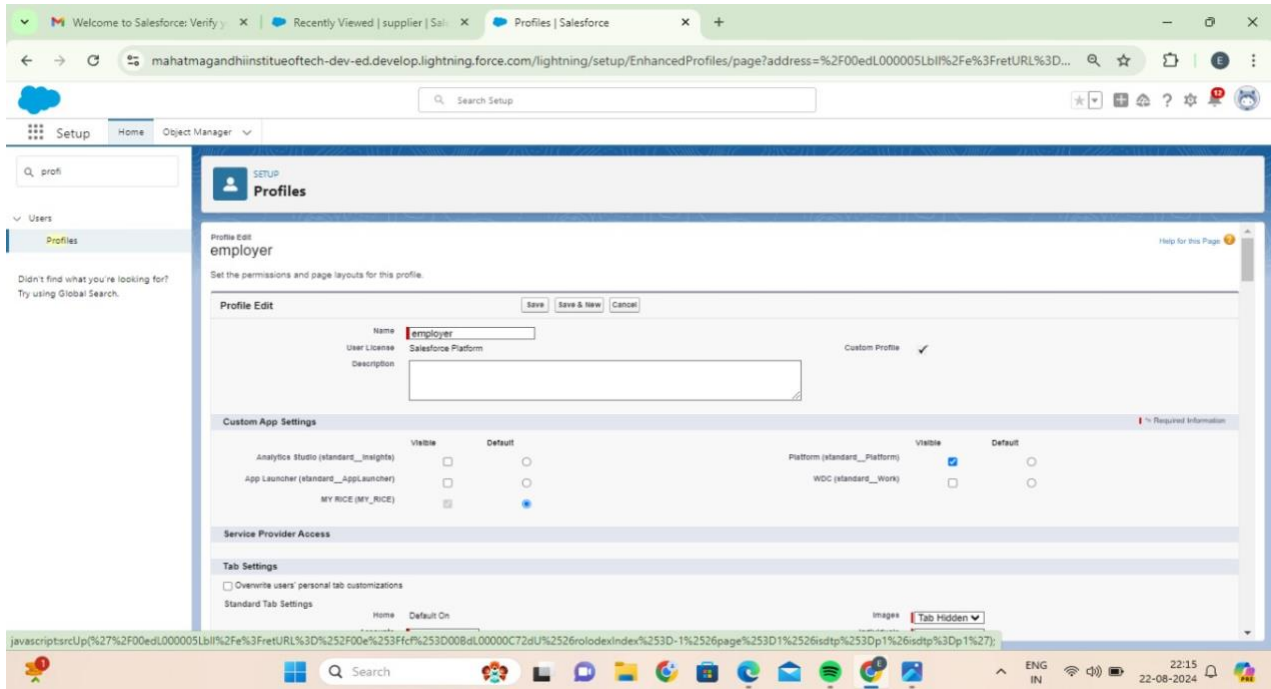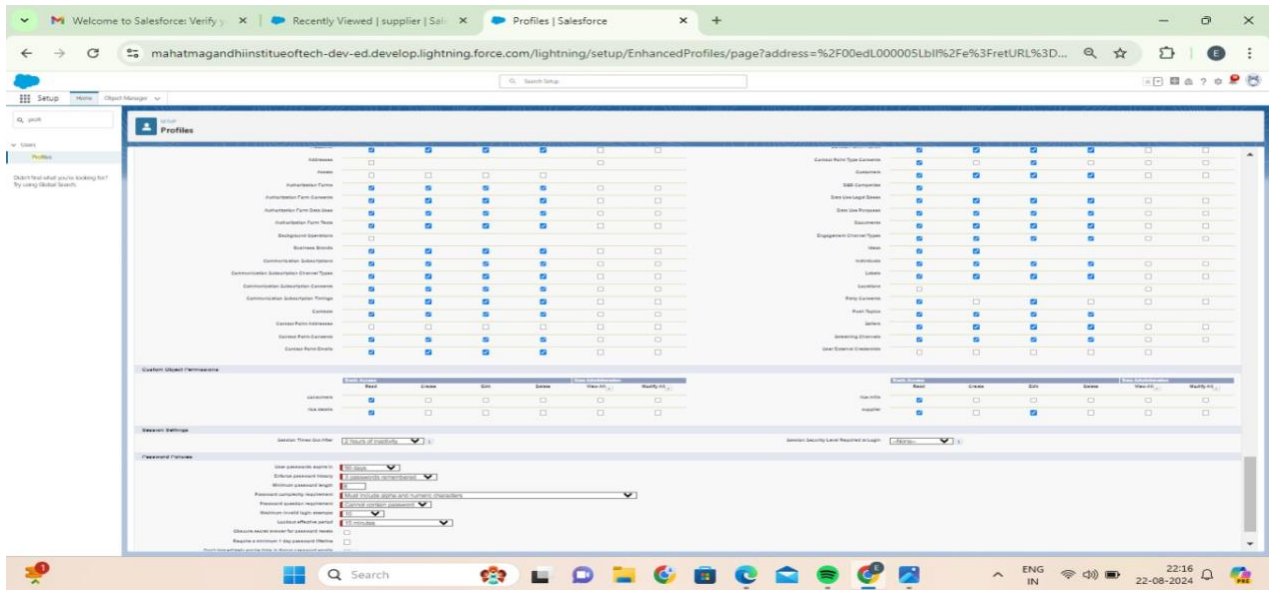
## Activity 3: worker Profile:

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.

Creating Owner, Employer And Worker Roles:
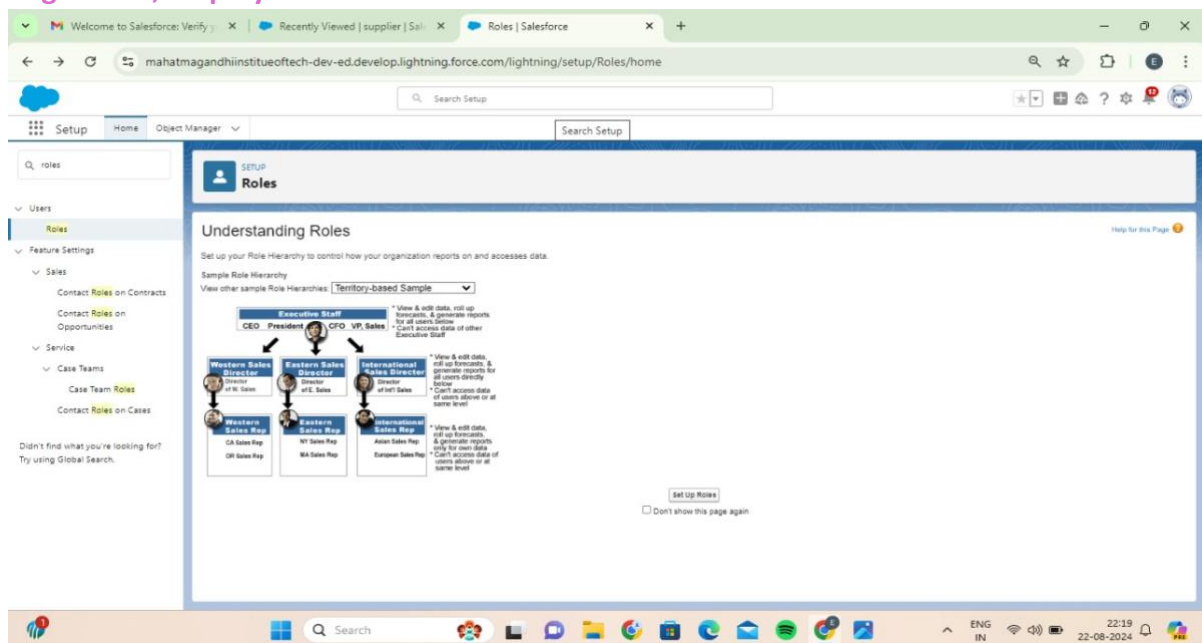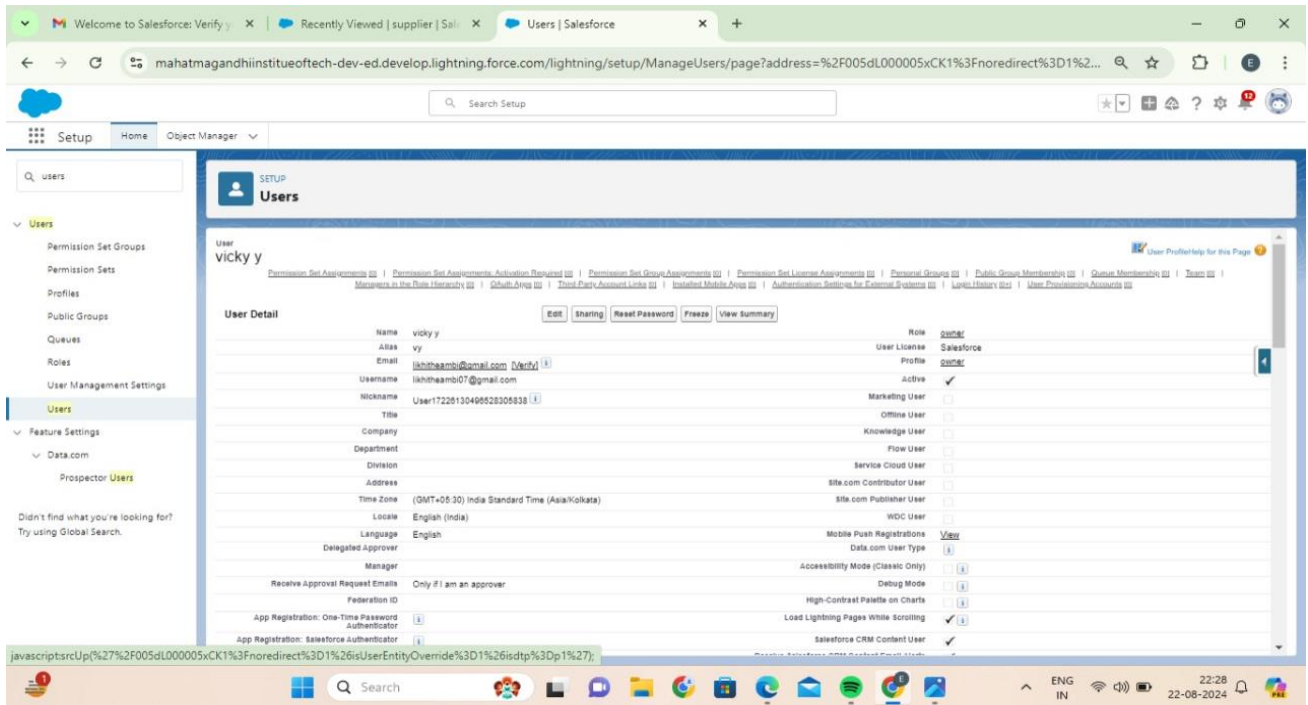

Milestone 9 - Users:

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.

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:
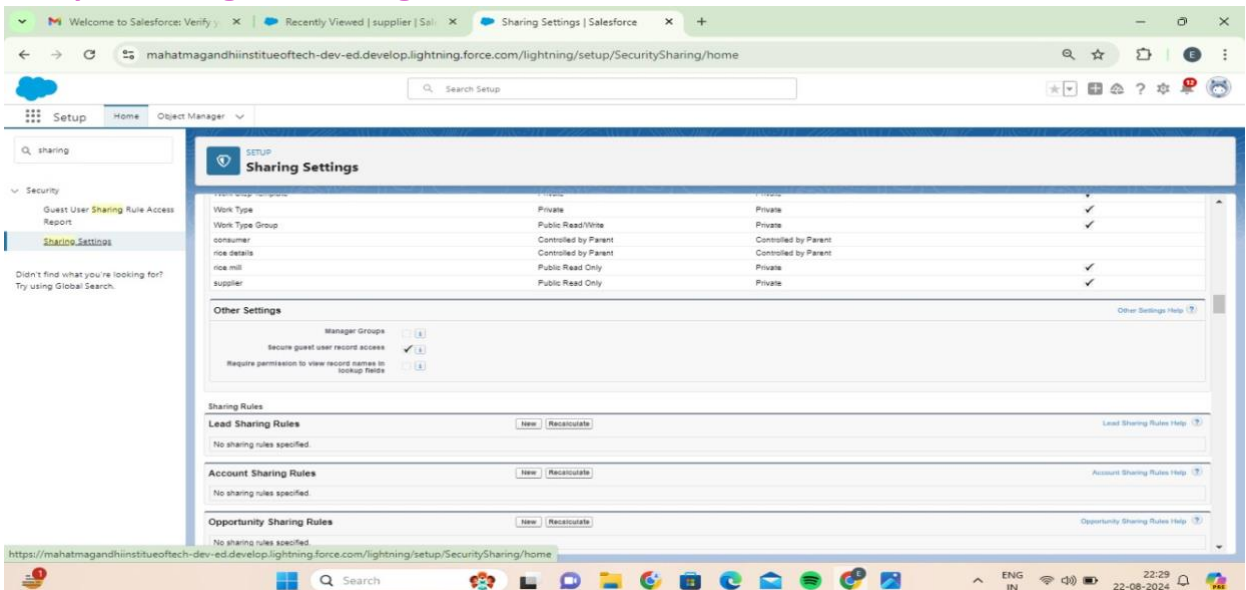
Milestone 11 - Reports:

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. **Activity 1: Create Report:**

Activity 2: Sharing report to owner:

Activity 3: create a report folder:
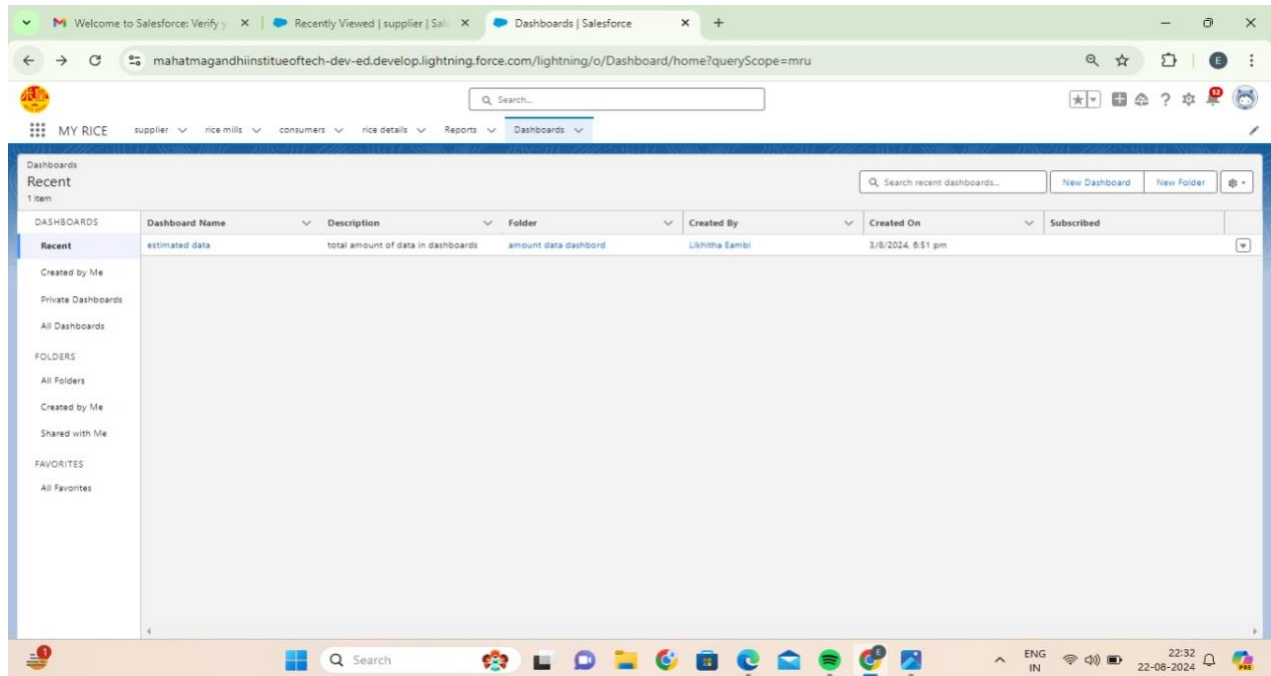
Milestone 12 - Dashboards:

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports.

Activity 1: Create Dashboard Folder:
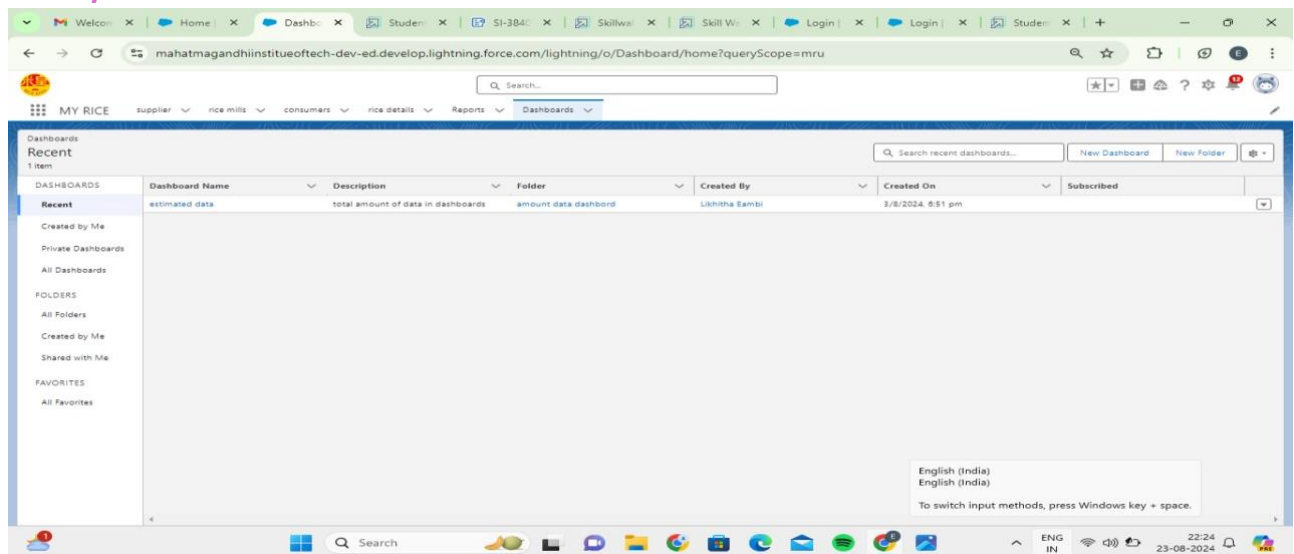
Activity 2: Create Dashboard:
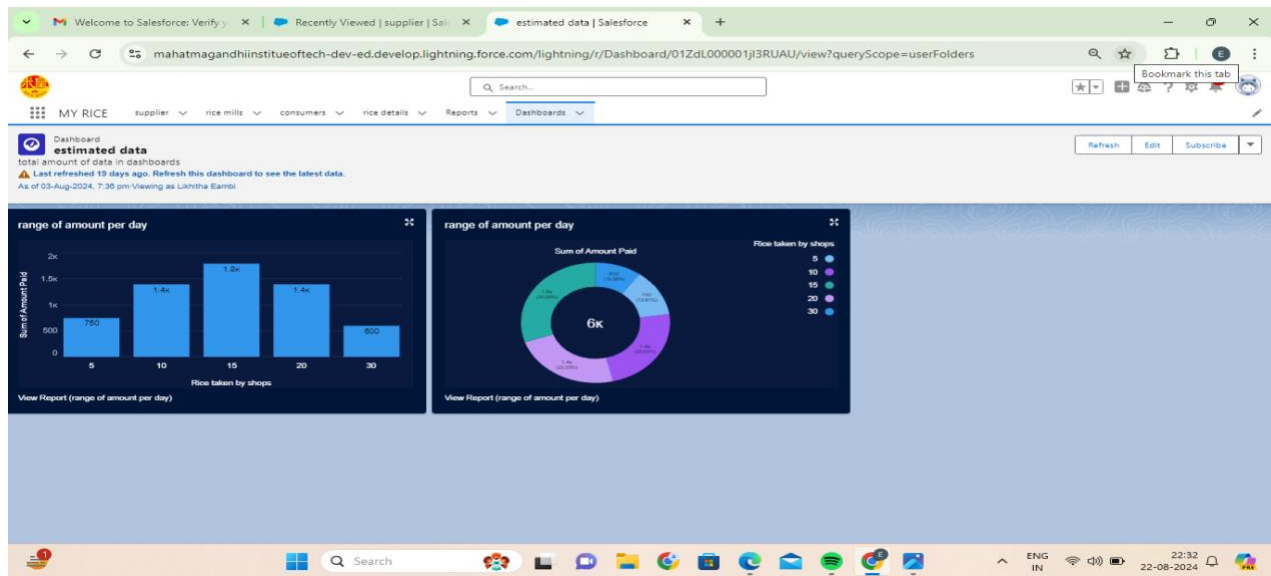
Conclusion:

Implementing a CRM application for a wholesale rice mill can significantly enhance the operational efficiency and customer satisfaction levels. This system is designed to address the unique needs of the wholesale rice industry, providing a comprehensive suite of tools to manage customer interactions, streamline sales processes, and improve overall business performance.

Key Benefits:

1. **Improved Customer Relationships:** The CRM application allows for detailed tracking of customer interactions, preferences, and purchase histories. This insight enables personalized service, timely follow-ups, and targeted marketing efforts, fostering stronger customer loyalty and retention.
2. **Streamlined Sales and Order Management:** Automation of order processing, inventory management, and sales tracking reduces manual errors and accelerates transaction times. This leads to more accurate order fulfillment and efficient handling of large volumes of transactions typical in wholesale operations.
3. **Enhanced Data Analytics:** Advanced reporting and analytics tools provide valuable insights into sales trends, customer behavior, and market opportunities. This data-driven approach supports informed decision-making and strategic planning, ultimately contributing to increased profitability.
4. **Operational Efficiency:** By integrating various functions such as customer service, inventory control, and sales management into a single platform, the CRM application

reduces redundancy and operational bottlenecks. This integration supports smoother workflows and better coordination among different departments.

5. **Scalability and Flexibility:** The CRM system is designed to adapt to the growing needs of the rice mill, accommodating increased transaction volumes and expanding customer bases without compromising performance.

Strategic Impact:

The adoption of a CRM application positions the wholesale rice mill to achieve competitive advantage through enhanced customer engagement and operational excellence. By leveraging technology to optimize processes and gain deeper insights into market dynamics, the rice mill can drive growth, improve customer satisfaction, and secure a stronger market presence.

In summary, the CRM application is a valuable investment that empowers the wholesale rice mill to better manage customer relationships, streamline operations, and harness data for strategic growth. Embracing this technology will not only address current business challenges but also pave the way for future success in a competitive industry.

Feel free to adjust the specifics based on the unique features of the CRM system you're working with and the particular needs of the wholesale rice mill.