A CRM APPLICATION FOR WHOLESALE RICEMILL

A DETAILED DOCUMENT OF THIS PROJECT

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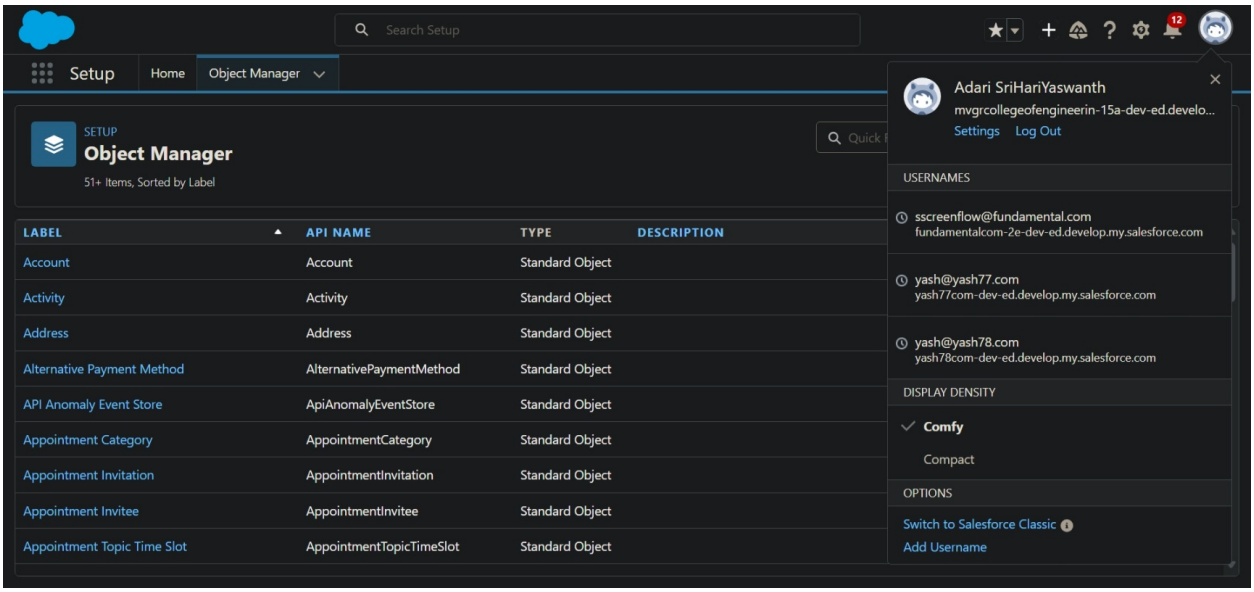
MVGR college of engineering

PROJECT OVERVIEW :

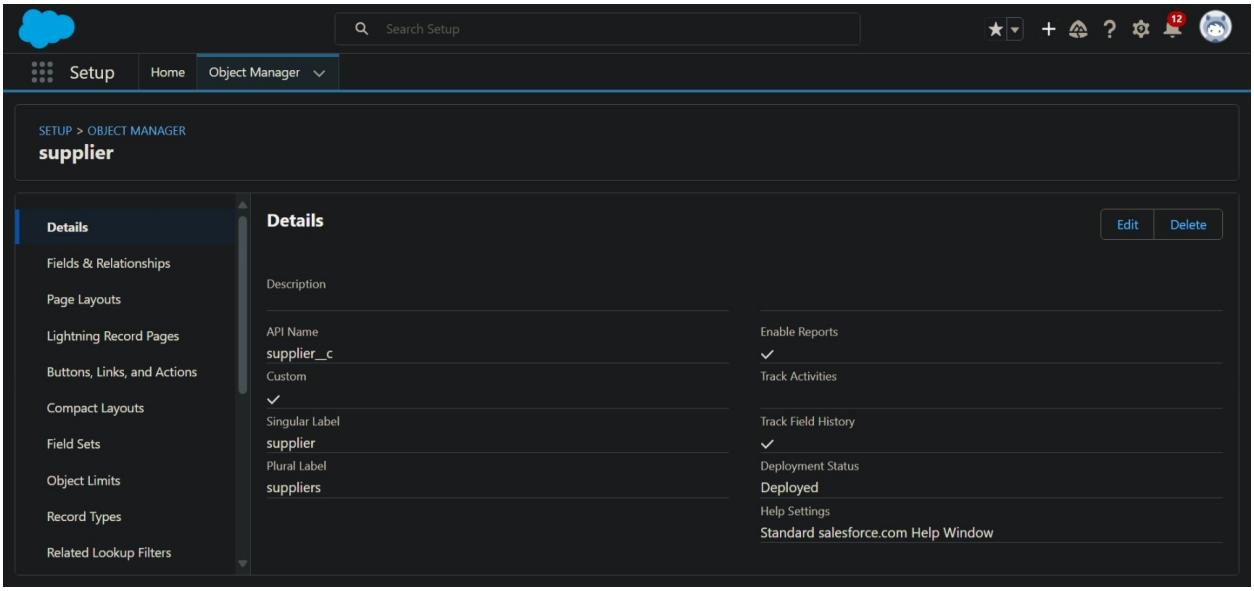
The Rice Mill CRM Application is a comprehensive solution designed to streamline and simplify how much rice per day,how many were sold that rice and which type of rice all reports send to owners daily wise. It leverages the power of customer relationship management (CRM) to enhance customer experiences, 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.

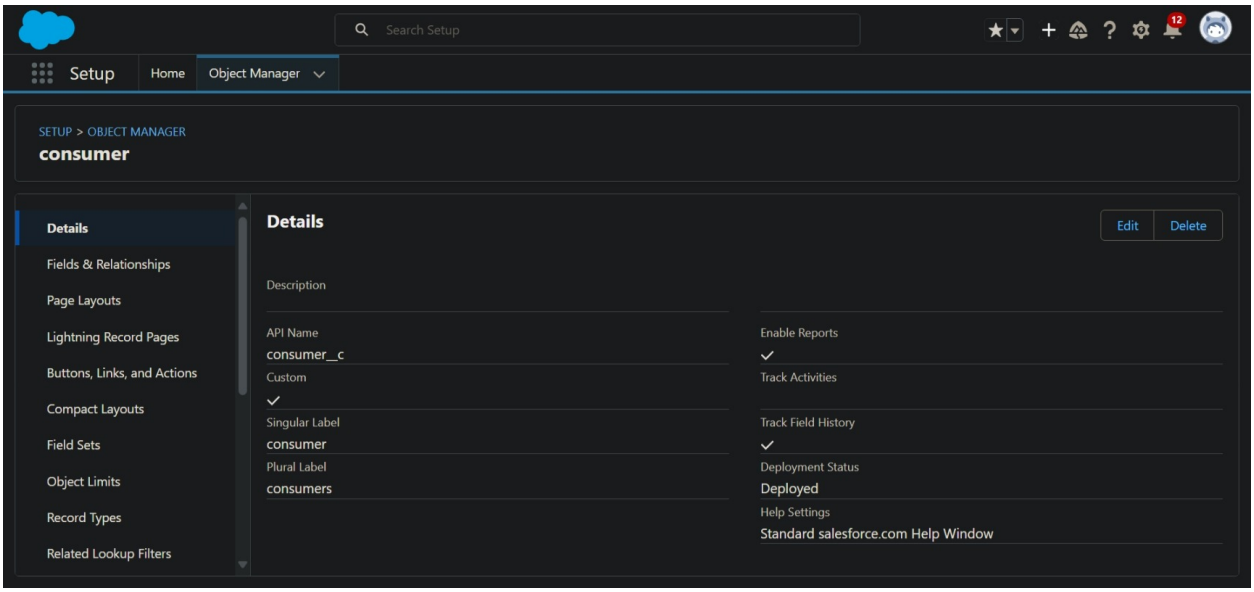
1.Developer Account Creation and Activation



2.Object Creation

creating objects of supplier, Consumer, rice mill and rice details.

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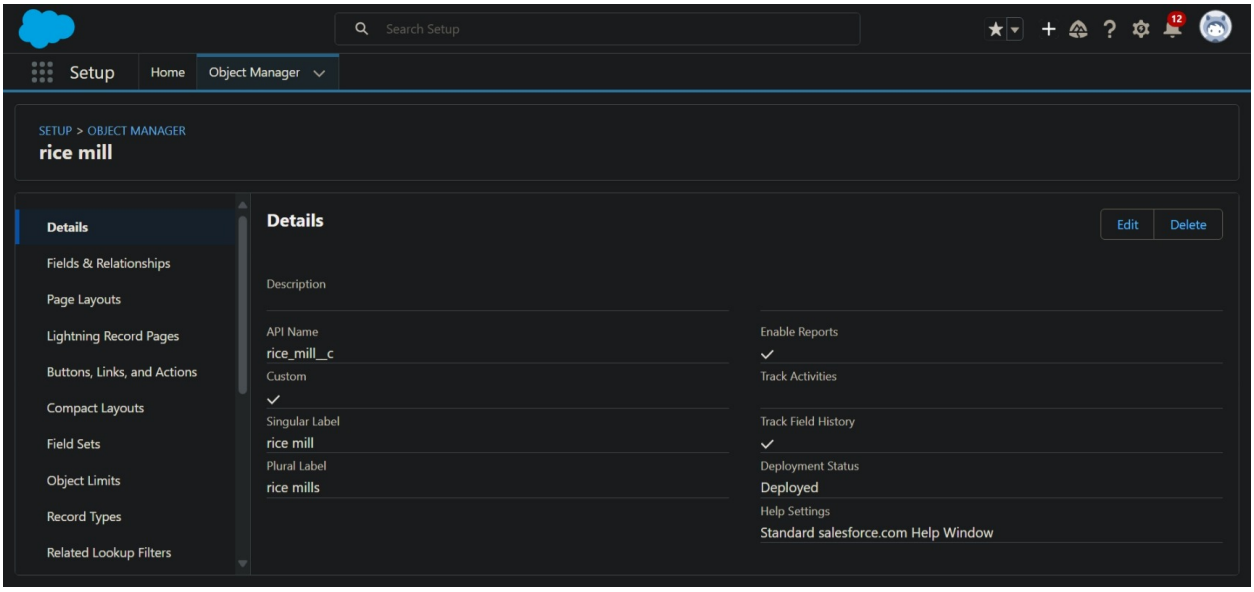
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
consumer
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Details
Edit
Delete
Description
API Name
consumer__c
Custom
Singular Label
consumer
Plural Label
consumers
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
rice mill
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Details
Edit
Delete
Description
API Name
rice_mill__c
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Track Field History
Deployment Status
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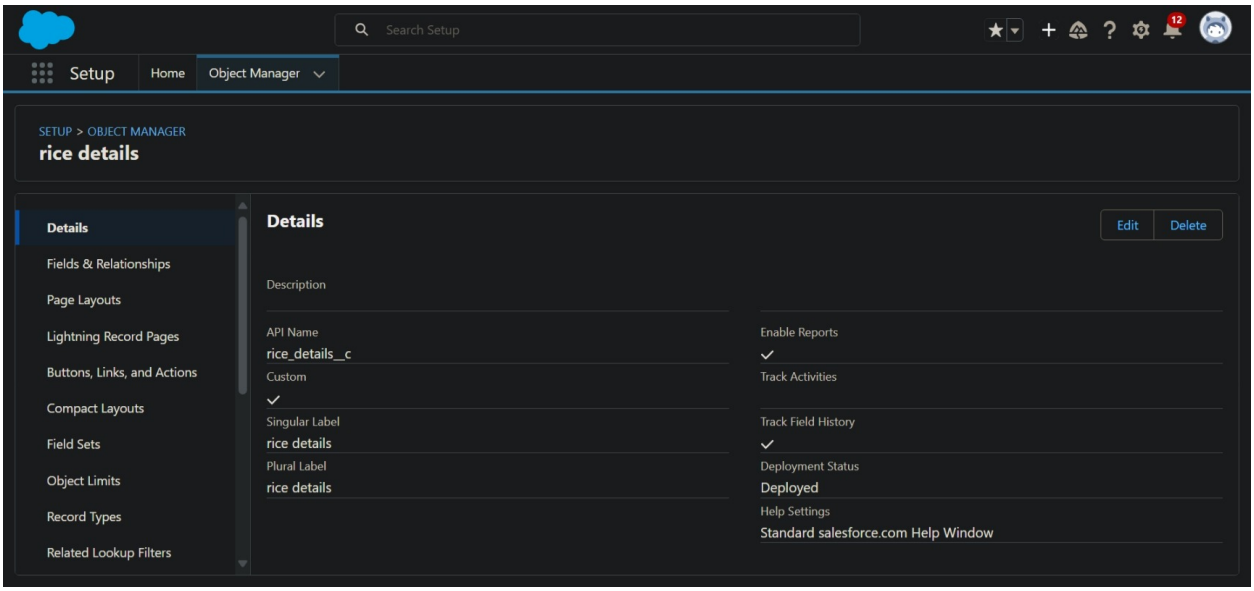
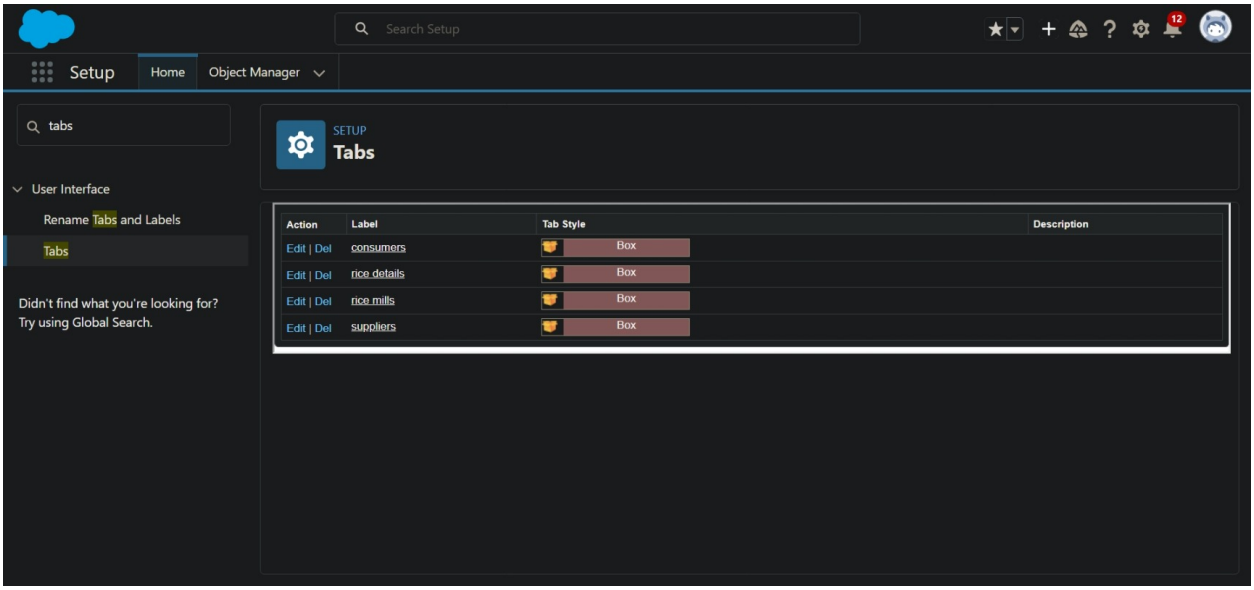
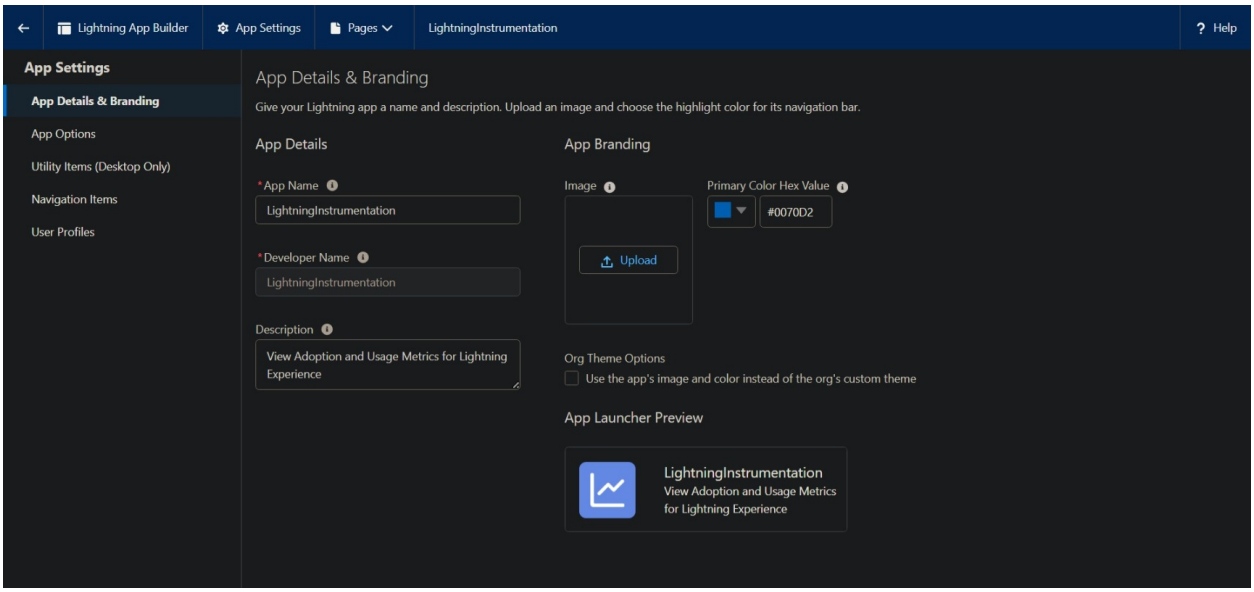
Standard salesforce.com Help Window



3.Creating of tabs& Lighting app for CRM Application:



Lightening app :



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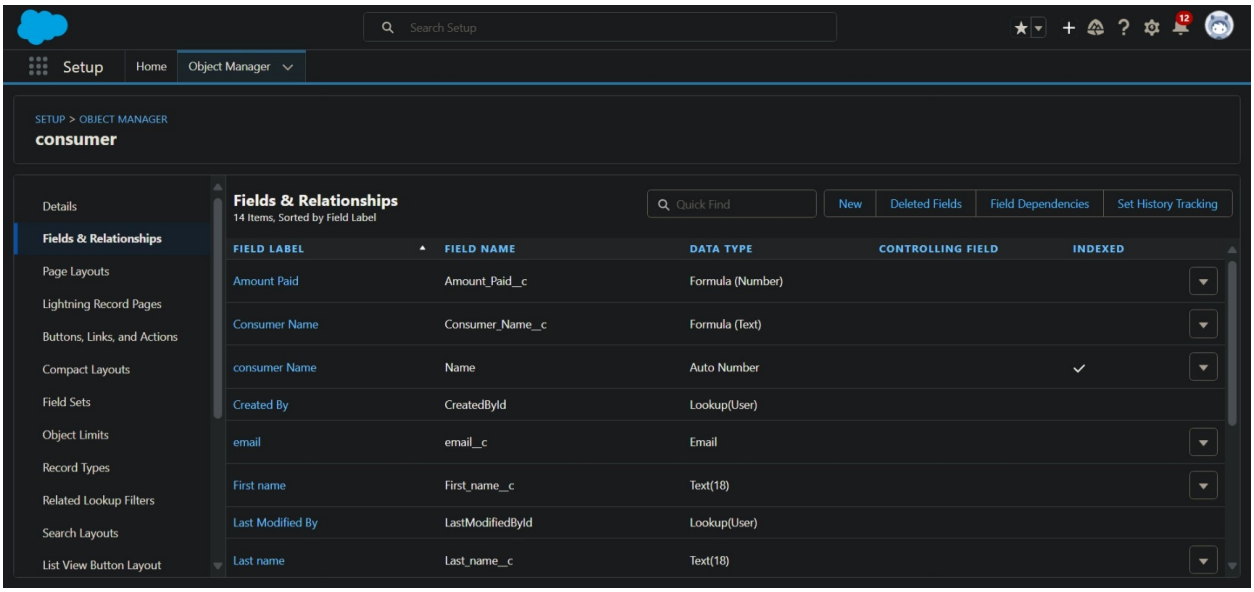
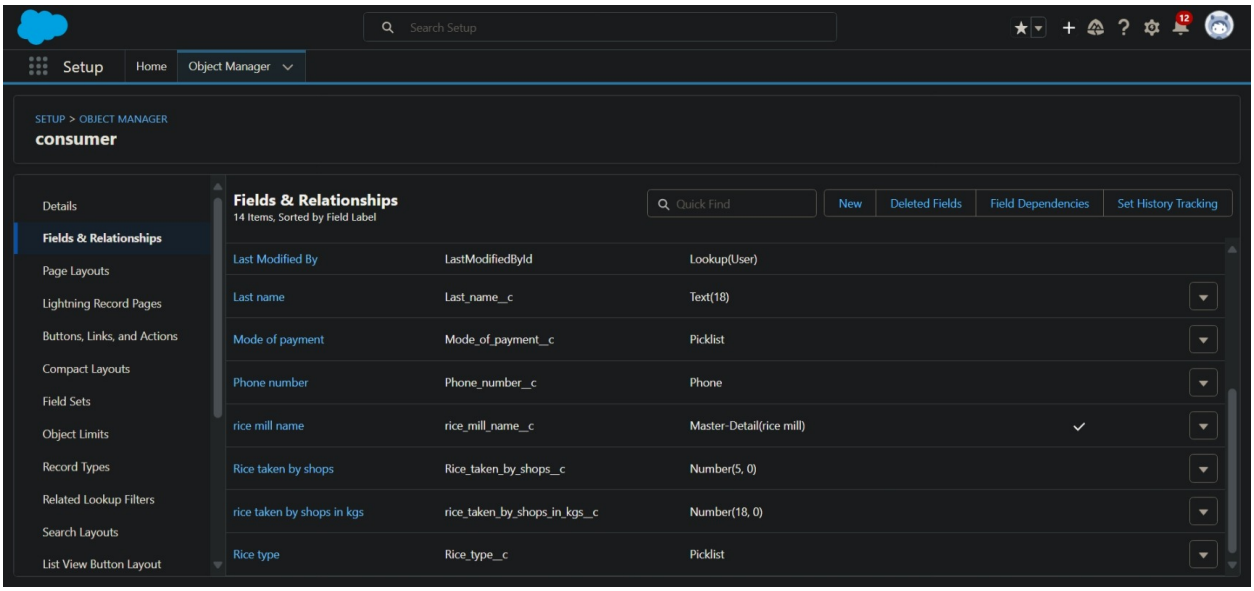
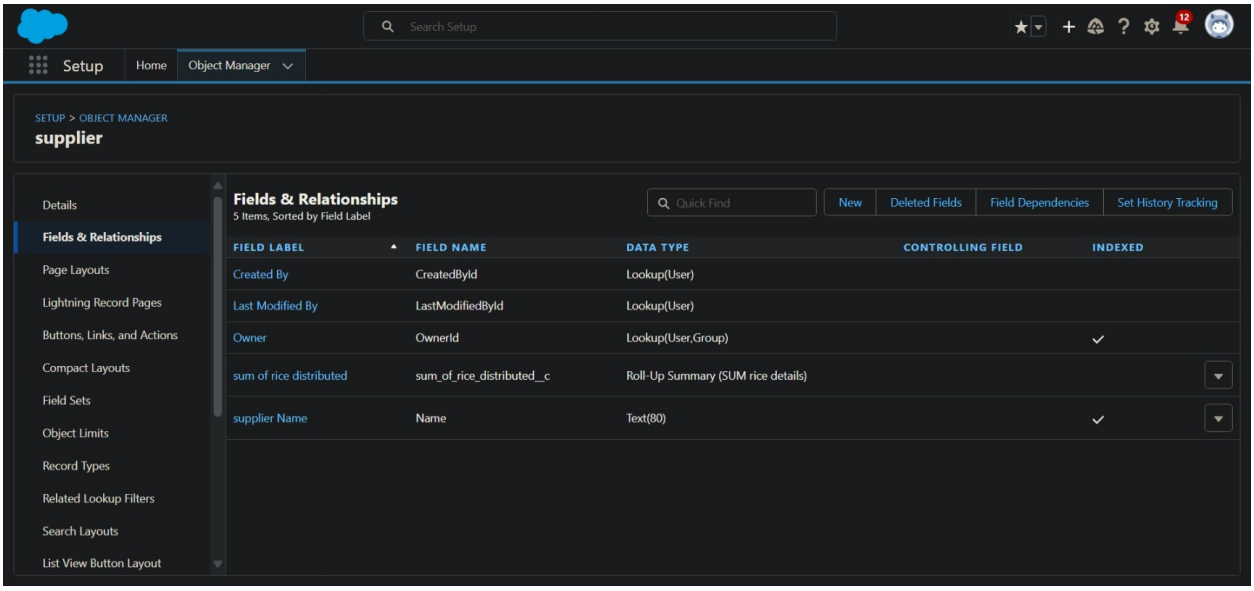
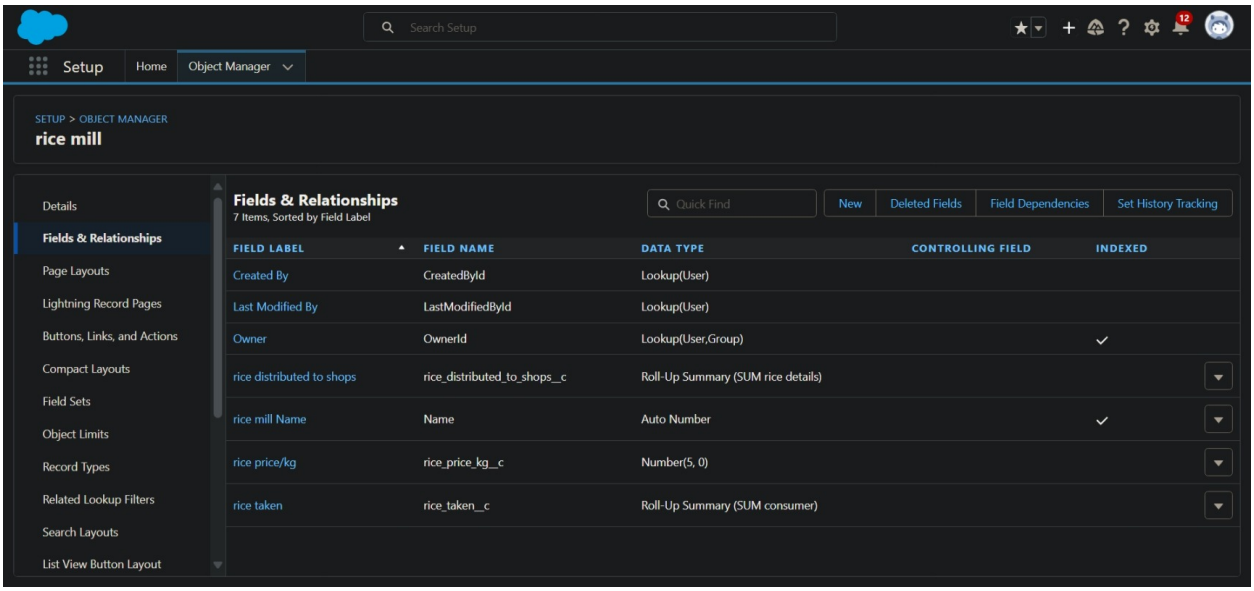
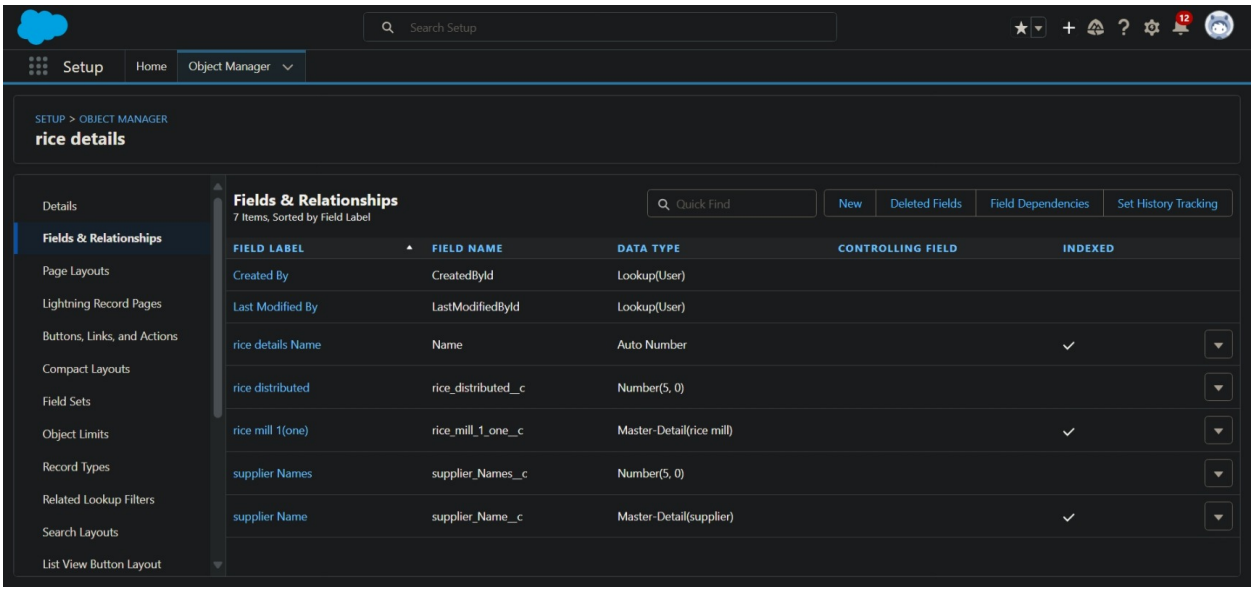



Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
consumer
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Fields & Relationships
14 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
Last Modified By LastModifiedById Lookup(User)
Last name Last_name__c Text(18)
Mode of payment Mode_of_payment__c Picklist
Phone number Phone_number__c Phone
rice mill name rice_mill_name__c Master-Detail(rice mill)
Rice taken by shops Rice_taken_by_shops__c Number(5, 0)
rice taken by shops in kgs rice_taken_by_shops_in_kgs__c Number(18, 0)
Rice type Rice_type__c Picklist


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
supplier
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
Fields & Relationships
5 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set 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)
sum of rice distributed sum_of_rice_distributed__c Roll-Up Summary (SUM rice details)
supplier Name Name Text(80)





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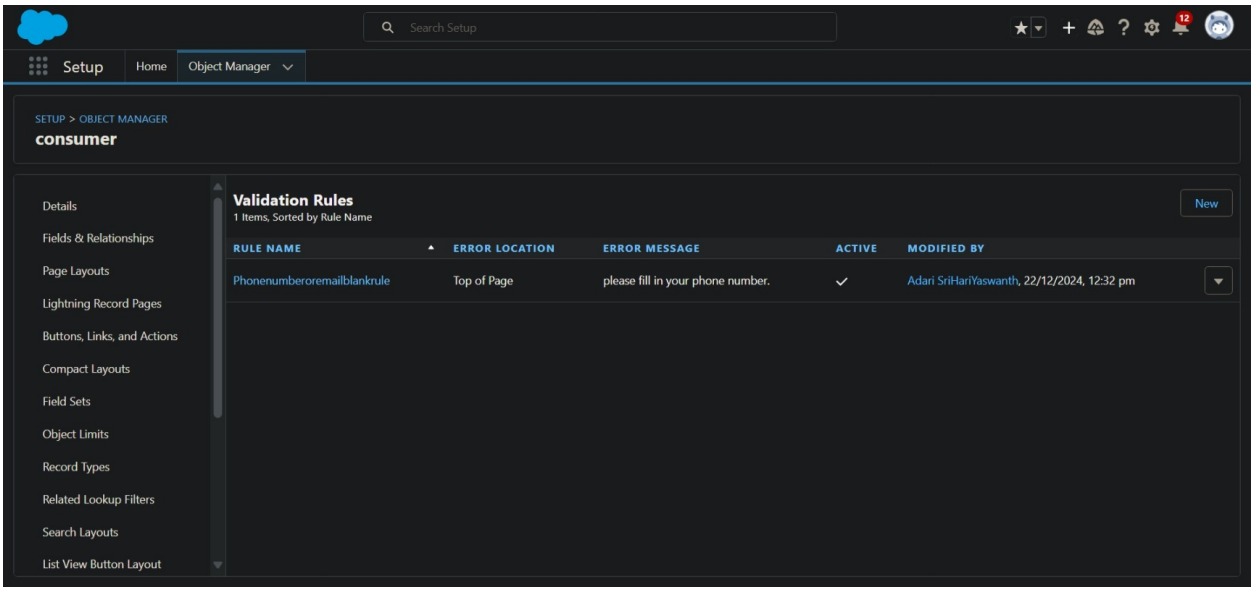

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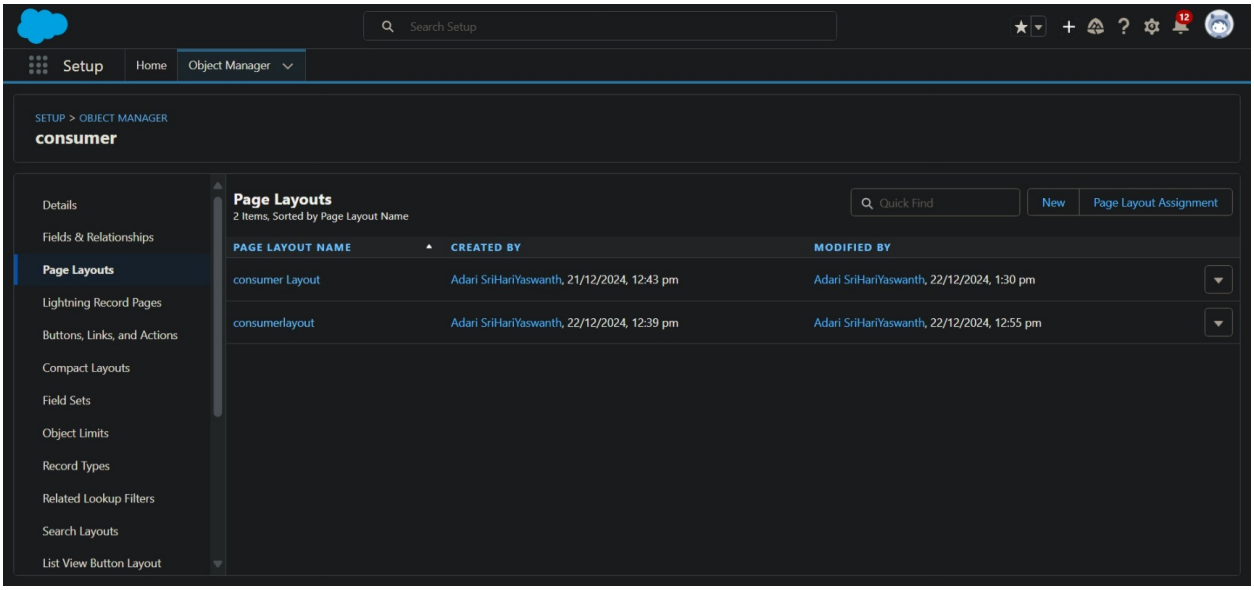

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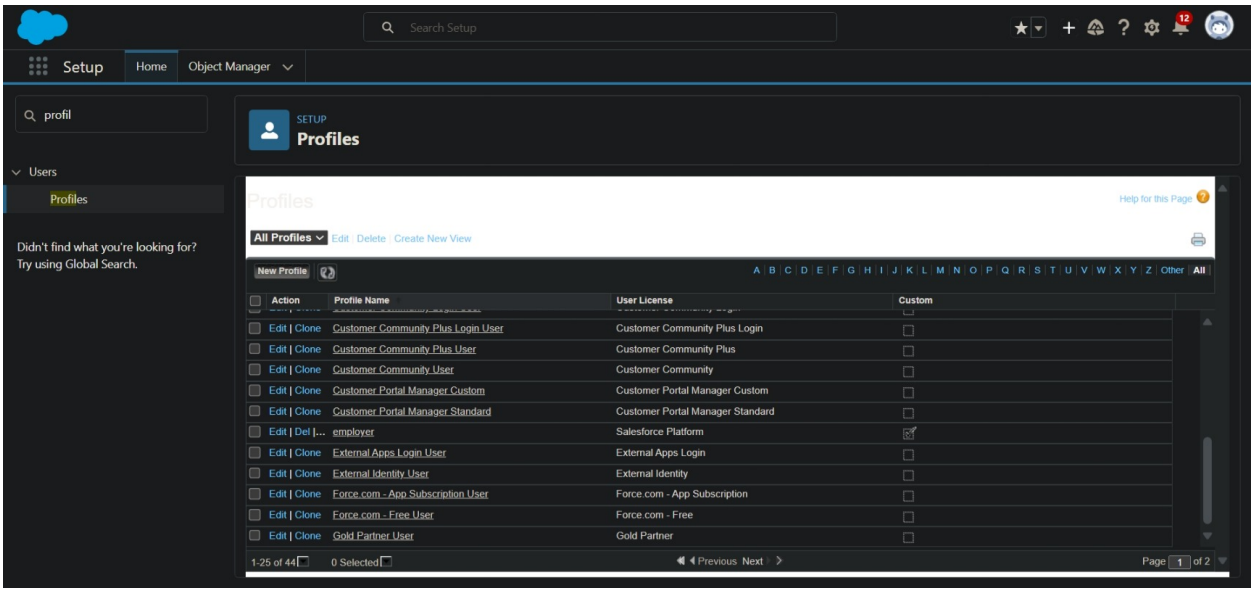

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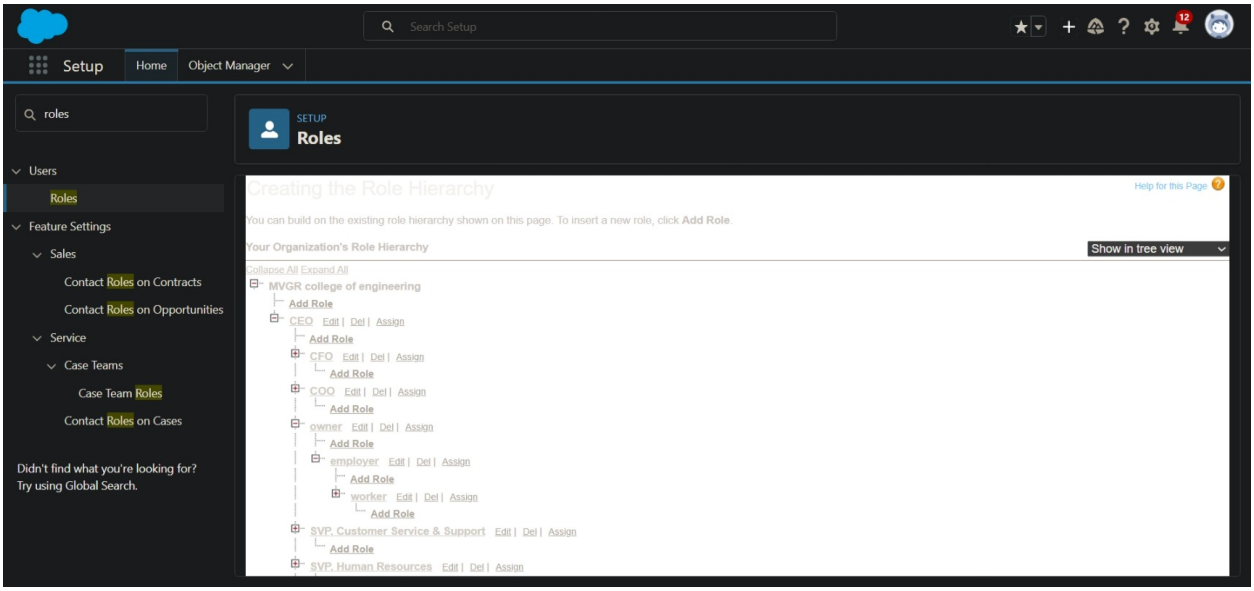

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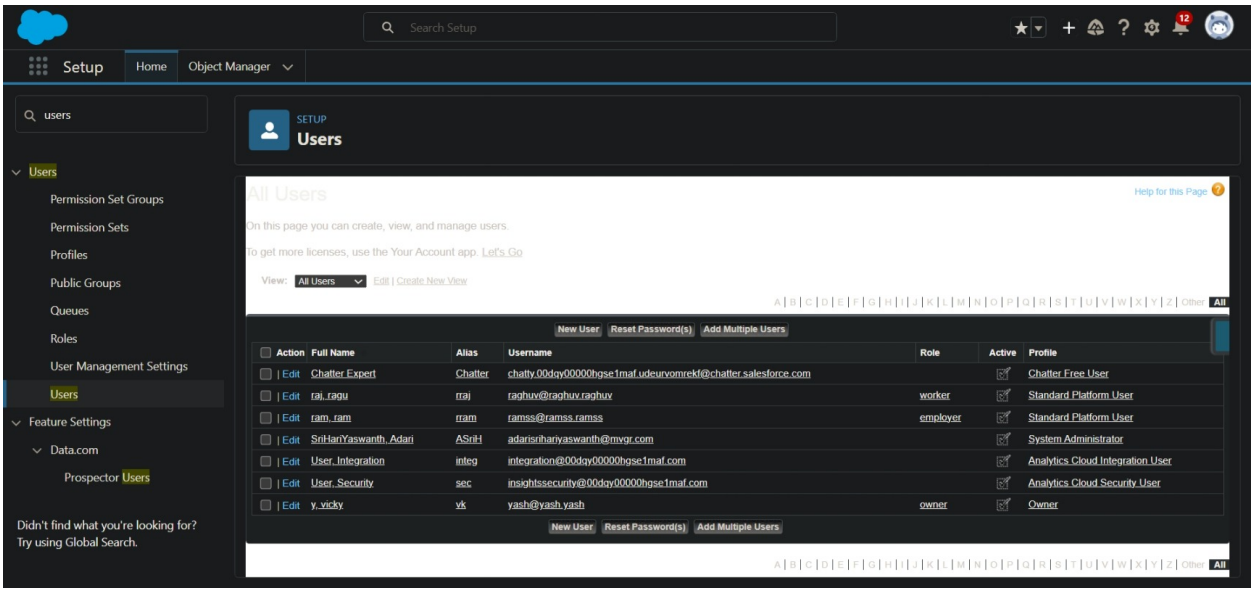

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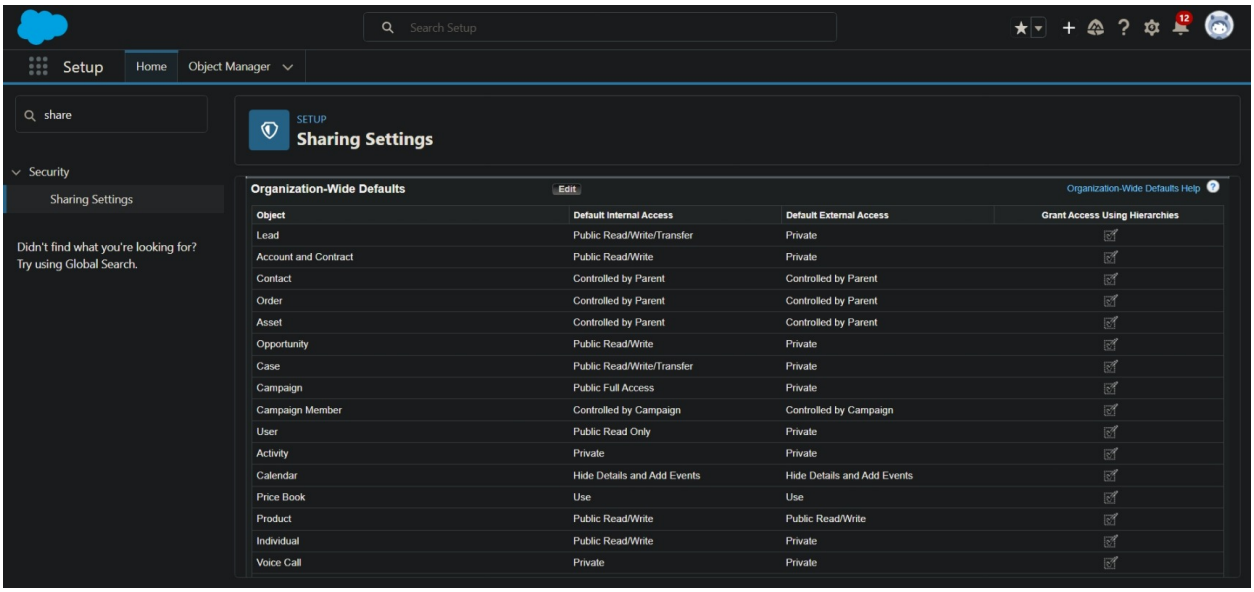

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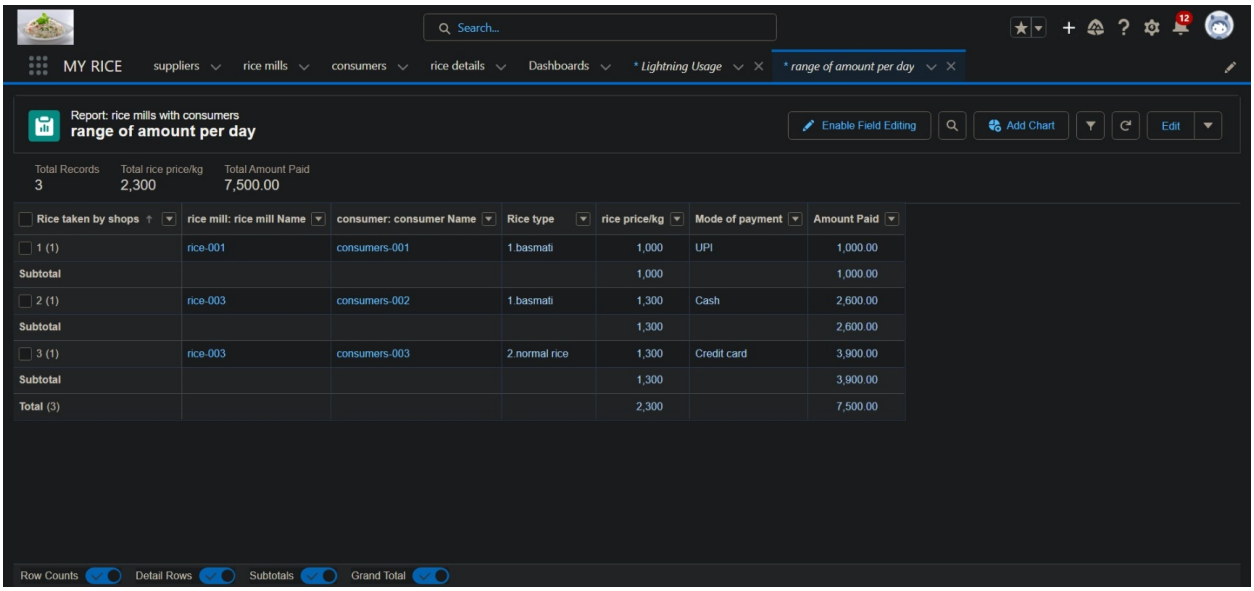
Search...
MY RICE
suppliers
rice mills
consumers
rice details
Dashboards
* Lightning Usage
* range of amount per day
Report: rice mills with consumers
range of amount per day
Enable Field Editing
Add Chart
Edit
Total Records
3
Total rice price/kg
2,300
Total Amount Paid
7,500.00
Rice taken by shops
rice mill: rice mill Name
consumer: consumer Name
Rice type
rice price/kg
Mode of payment
Amount Paid
1 (1) rice-001 consumers-001 1.basmati 1,000 UPI 1,000.00
Subtotal 1,000 1,000.00
2 (1) rice-003 consumers-002 1.basmati 1,300 Cash 2,600.00
Subtotal 1,300 2,600.00
3 (1) rice-003 consumers-003 2.normal rice 1,300 Credit card 3,900.00
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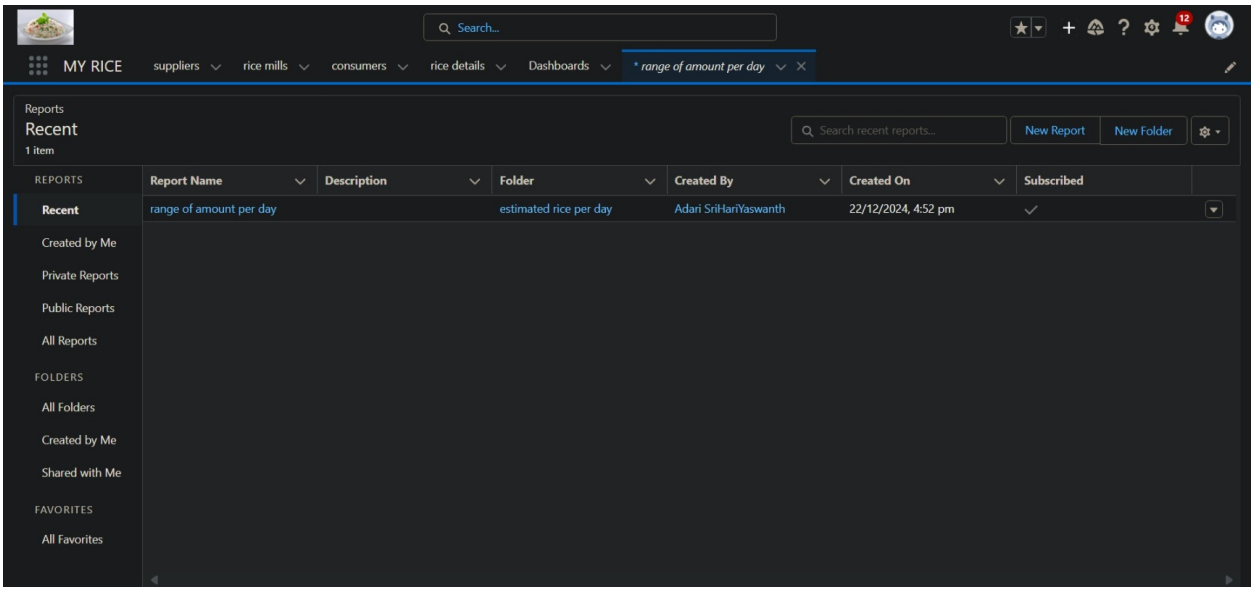
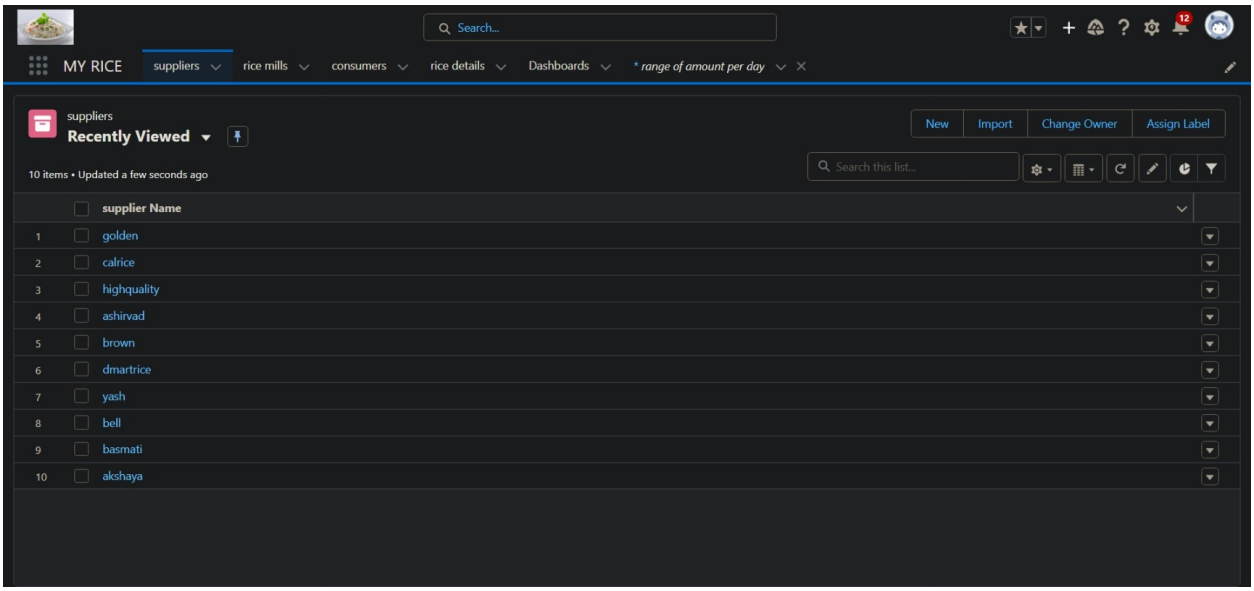
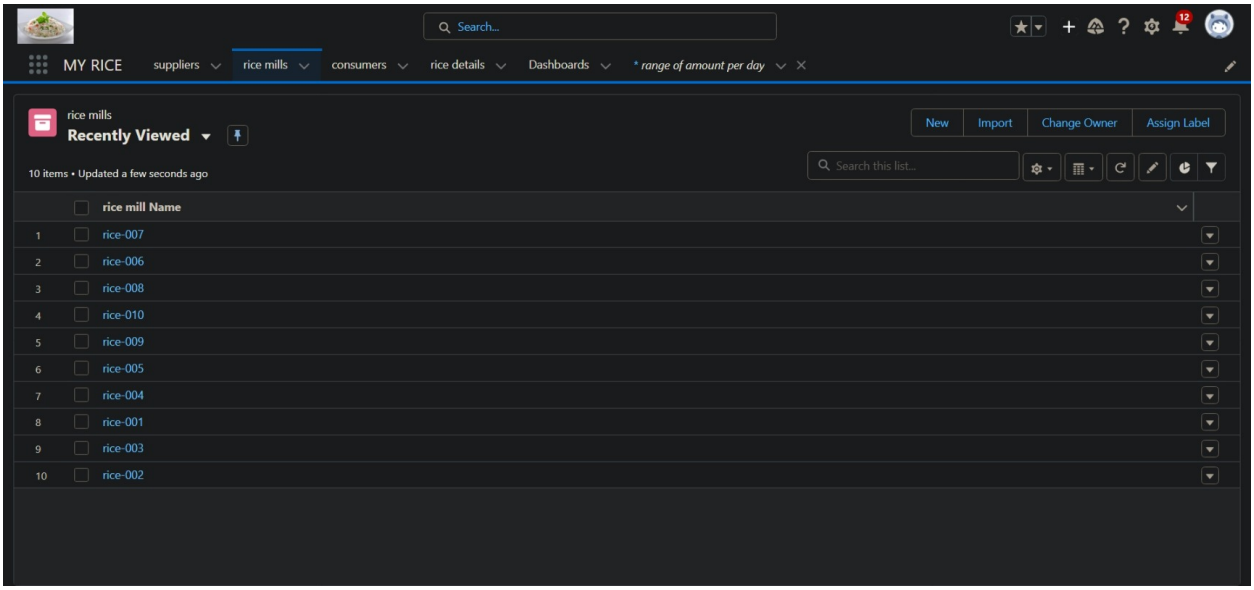
Total (3) 2,300 7,500.00
Row Counts
Detail Rows
Subtotals
Grand Total


Search...
MY RICE
suppliers
rice mills
consumers
rice details
Dashboards
* range of amount per day
Reports
Recent
1 item
Search recent reports...
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Report Name
Description
Folder
Created By
Created On
Subscribed
range of amount per day
estimated rice per day
Adari SriHariYaswanth
22/12/2024, 4:52 pm

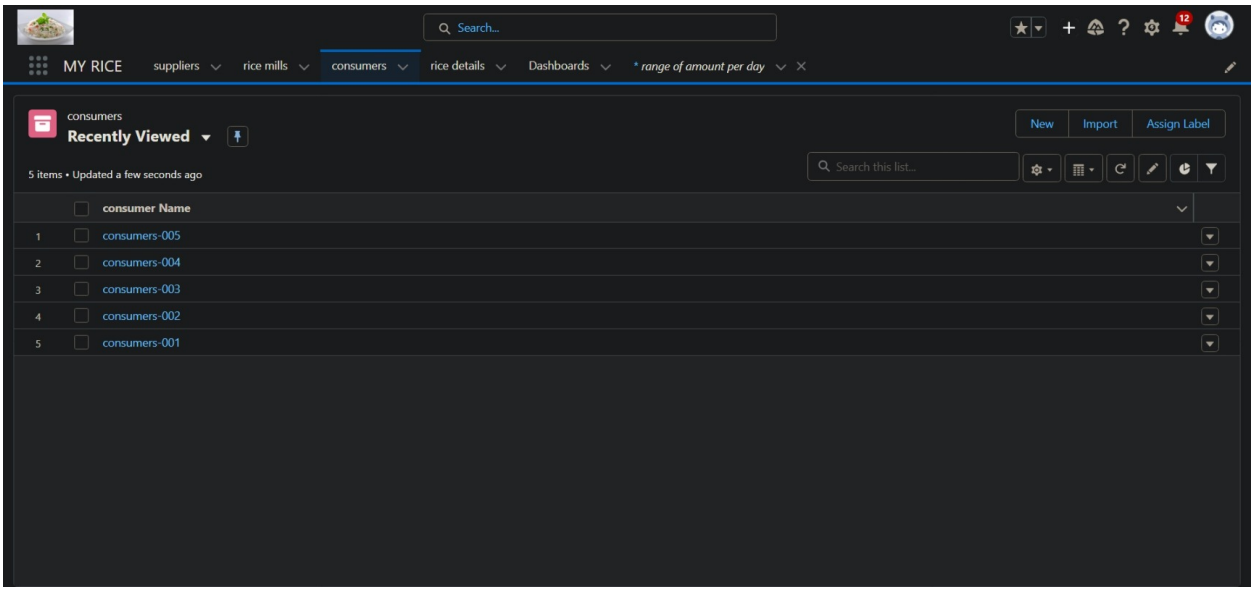
Suppliers :



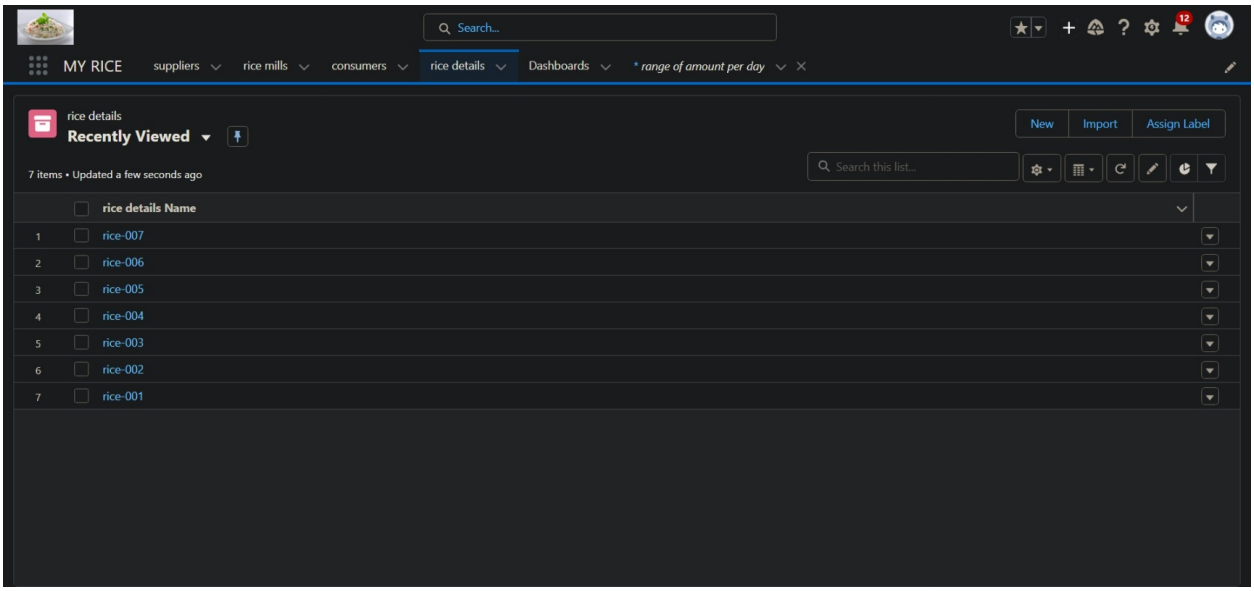
Rice mills :



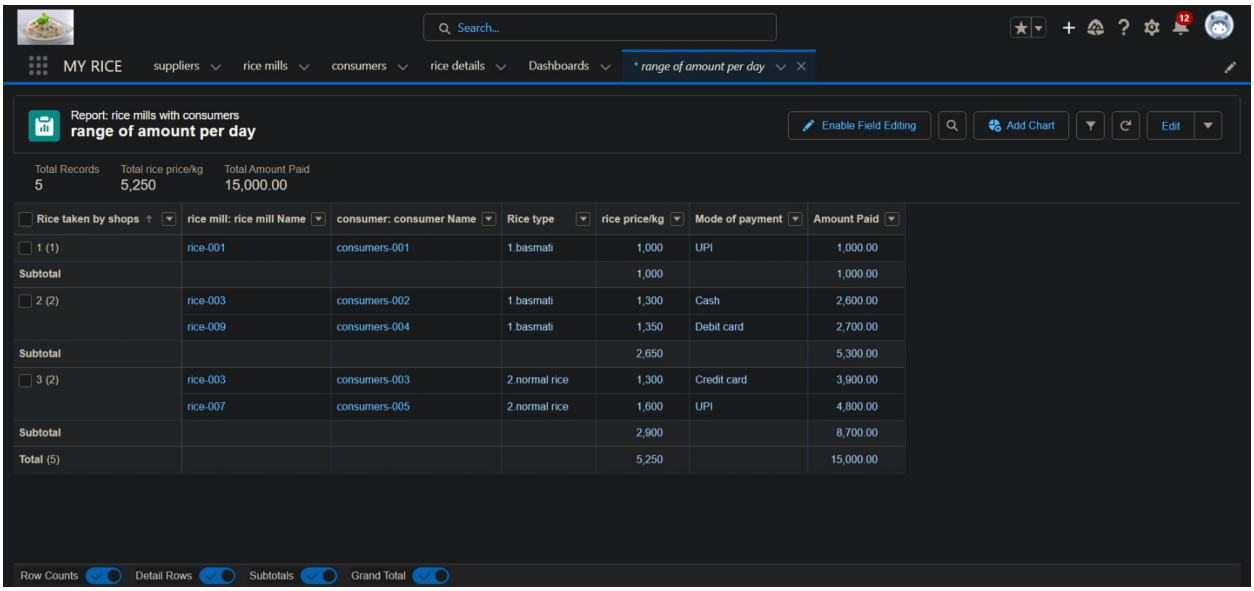
Consumers :



Rice Details :



Dashboard :


Search...
MY RICE
suppliers
rice mills
consumers
rice details
Dashboards
* range of amount per day
Report: rice mills with consumers
range of amount per day
Enable Field Editing
Add Chart
Edit
Total Records
5
Total rice price/kg
5,250
Total Amount Paid
15,000.00
Rice taken by shops
rice mill: rice mill Name
consumer: consumer Name
Rice type
rice price/kg
Mode of payment
Amount Paid
1 (1)
rice-001
consumers-001
1.basmati
1,000
UPI
1,000.00
Subtotal
1,000
1,000.00
2 (2)
rice-003
consumers-002
1.basmati
1,300
Cash
2,600.00
rice-009
consumers-004
1.basmati
1,350
Debit card
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Subtotal
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5,300.00
3 (2)
rice-003
consumers-003
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Credit card
3,900.00
rice-007
consumers-005
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1,600
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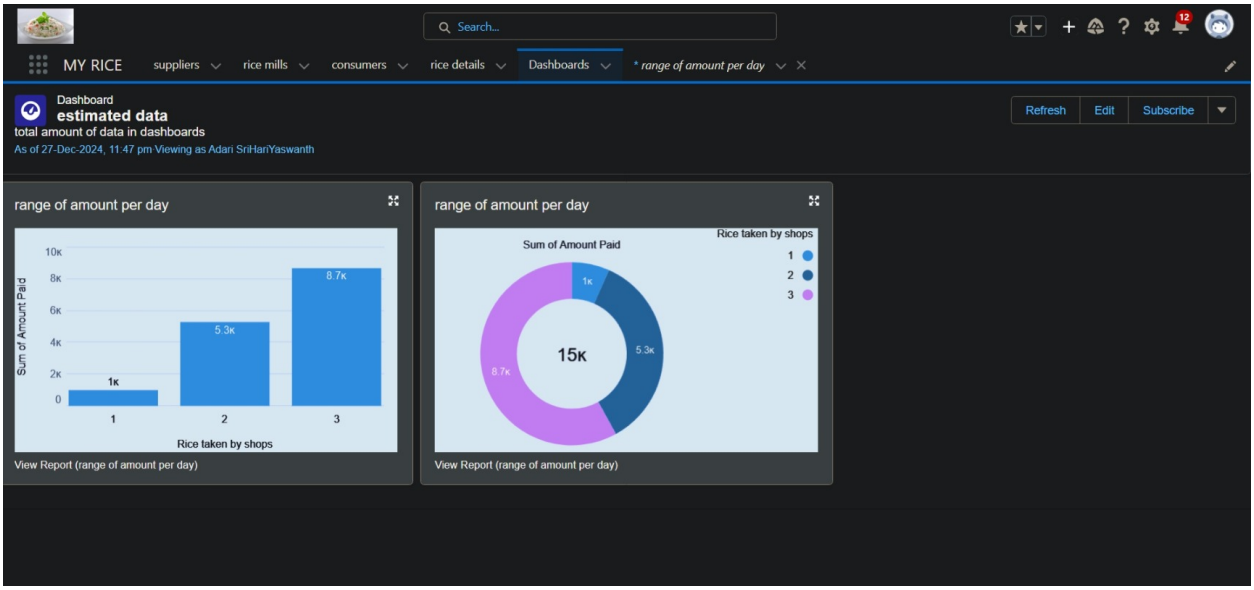
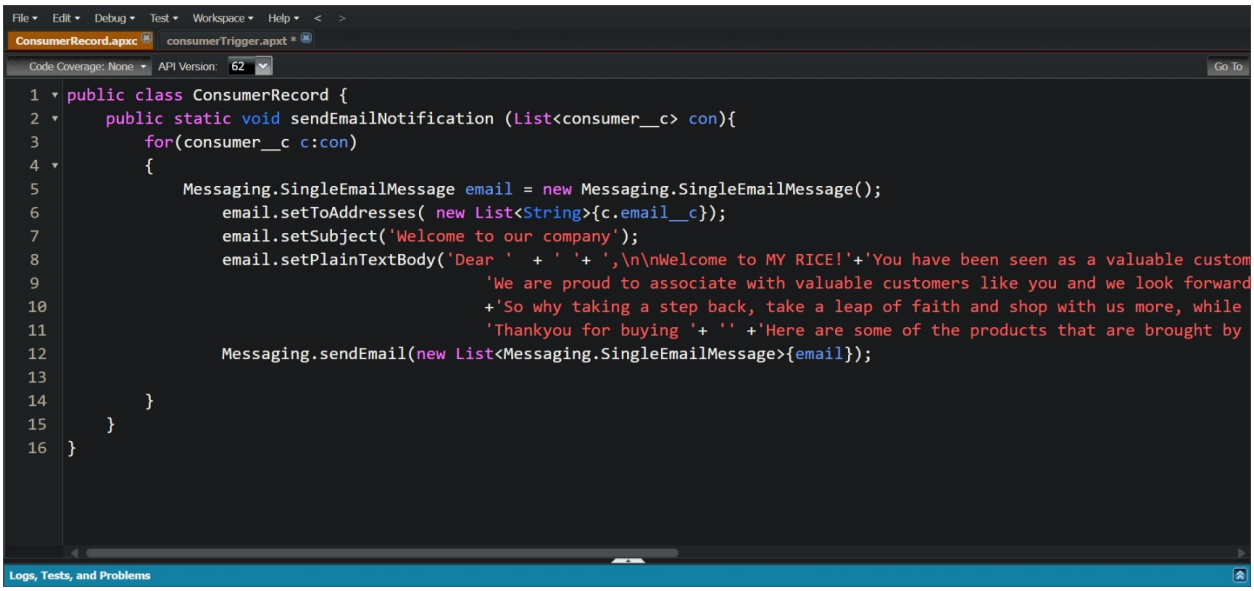
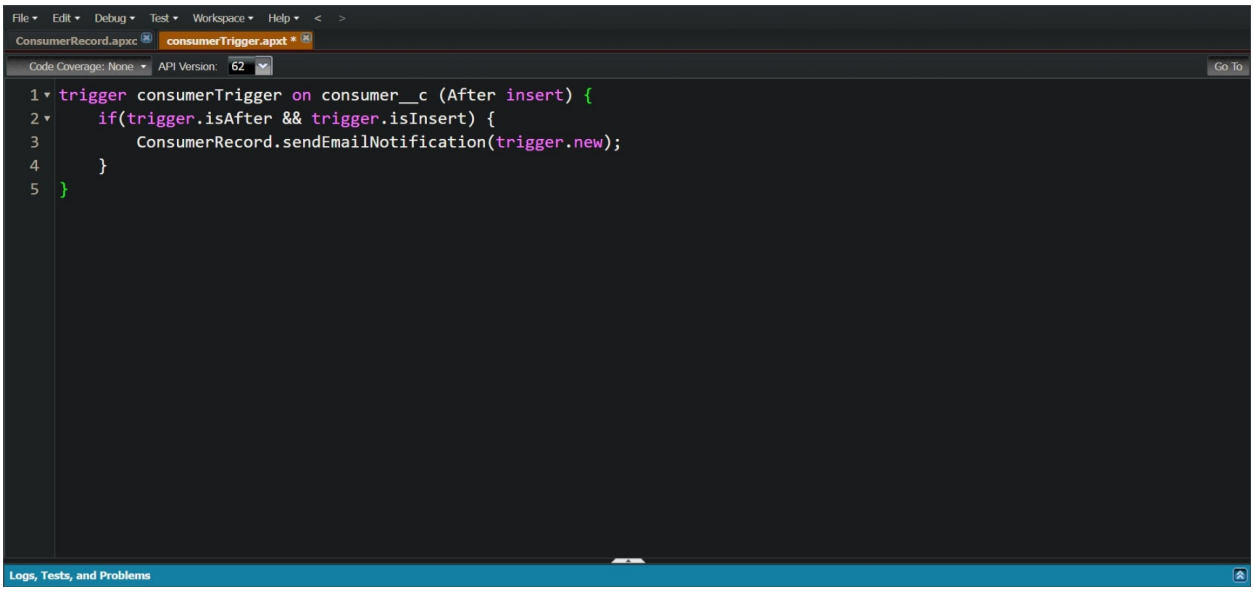
Total (5)
5,250
15,000.00
Row Counts
Detail Rows
Subtotals
Grand Total


Search...
MY RICE
suppliers
rice mills
consumers
rice details
Dashboards
* range of amount per day
Dashboard
estimated data
total amount of data in dashboards
As of 27-Dec-2024, 11:47 pm Viewing as Adari SriHariYaswanth
Refresh
Edit
Subscribe
range of amount per day
Sum of Amount Paid
10K
8K
6K
4K
2K
0
1K
5.3K
8.7K
1
2
3
Rice taken by shops
View Report (range of amount per day)
range of amount per day
Sum of Amount Paid
Rice taken by shops
1
2
3
1K
5.3K
8.7K
15K
View Report (range of amount per day)

Apex:





Conclusion and Future work :

The Rice Mill CRM Application is set to transform operational efficiency and customer relationship management within rice mill factories. By incorporating sophisticated reporting features, automated data aggregation, cross-object computations, and robust validation mechanisms, this application tackles the distinct challenges encountered by rice mill proprietors. It delivers precise, real-time insights into daily production, sales, and revenue, enabling well-informed decision-making and strategic planning.

Additionally, the application's intuitive interface and customized permission settings ensure secure and role-specific access to essential information, fostering transparency and accountability across the organization. As an all-encompassing solution, the Rice Mill CRM Application not only optimizes workflows but also enhances resource utilization, boosts

customer satisfaction, and elevates overall business performance.

In conclusion, the Rice Mill CRM Application is a vital asset for rice mill factories, purpose-built to address their unique requirements and promote sustainable growth and success in a competitive market.