

A CRM APPLICATION FOR WHOLESALE RICE MILL

1. Project Overview

This project is focused on creating a CRM application for a wholesale rice mill, designed to address the management of customer relationships, order tracking, and inventory control. The goal is to deliver a comprehensive solution by leveraging modern web development frameworks and database systems. Through this project, we aim to enhance operational efficiency, data accuracy, and customer satisfaction and support the long-term goals of streamlining processes and improving customer retention for the rice mill business.

The Rice Mill CRM Application is a comprehensive solution tailored to streamline and simplify operations in a rice mill factory. It tracks daily rice production, sales, and types while generating automated reports sent to owners on a daily basis. By leveraging customer relationship management (CRM) concepts, this application enhances customer experiences, optimizes store operations, and improves overall efficiency.

2. Objectives

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

Business Goals:

Streamline Customer Relationship Management: Enable efficient tracking and management of customer interactions, orders, and feedback.

Enhance Decision-Making: Provide detailed insights and analytics on sales, customer behavior, and inventory trends to support data-driven decisions.

Improve Customer Retention: Foster stronger customer relationships through personalized communication and timely support.

Specific Outcomes:

- User-Friendly CRM Dashboard: Deliver an intuitive interface for managing customers, orders, and inventory.
- Order Management System: Implement a streamlined workflow for tracking orders from placement to delivery.
- Reporting and Analytics Module: Provide customized reports on sales trends, inventory usage, and customer preferences.
- Create a dedicated portal where customers can view their order history, check order statuses, and communicate directly with the business.

3. Salesforce Key Features and Concepts Utilized

Accounts and Contacts:

- Manage wholesale customers (accounts) and their associated contact information efficiently.
- Categorize customers based on business type, purchase history, or location.

Leads and Opportunities:

- Track potential customers (leads) and convert them into opportunities.

- Manage sales pipelines for new bulk buyers and partnerships.

Custom Objects:

- Design custom objects for rice mill-specific data, such as "Order Details," "Shipment Tracking," and "Rice Varieties."

Reports and Dashboards:

- Generate real-time reports and visually engaging dashboards for sales trends, inventory updates, and customer behavior analysis.

Email Integration:

- Use Salesforce's email integration features for bulk communication, promotional campaigns, and personalized customer interaction.

Customizable CRM:

- Tailor Salesforce workflows and interfaces to meet the unique needs of the wholesale rice mill business.

4. Detailed Steps to Solution Design

Screenshots :

Objects:

- **Supplier Object:** Captures supplier details such as name, contact information, and total supply history.
- **Rice Mill Object:** Maintains core mill details including production capacity and operational schedules
- **Consumer Object:** Stores customer information, purchase history, and payment details.
- **Rice Details Object:** Tracks various rice types, stock levels, and pricing information.

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

Details

Edit Delete

Description

API Name

supplier_c

Custom

✓

Singular Label

supplier

Plural Label

supplier

Enable Reports

✓

Track Activities

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

SETUP > OBJECT MANAGER

rice mill

Details

- Fields & Relationships
- Page Layouts
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- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout

Details

Edit Delete

Description

API Name

rice_mill_c

Custom

✓

Singular Label

rice mill

Plural Label

rice mills

Enable Reports

✓

Track Activities

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

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

Details

Edit Delete

Description

API Name

consumer_c

Custom

✓

Singular Label

consumer

Plural Label

consumers

Enable Reports

✓

Track Activities

Track Field History

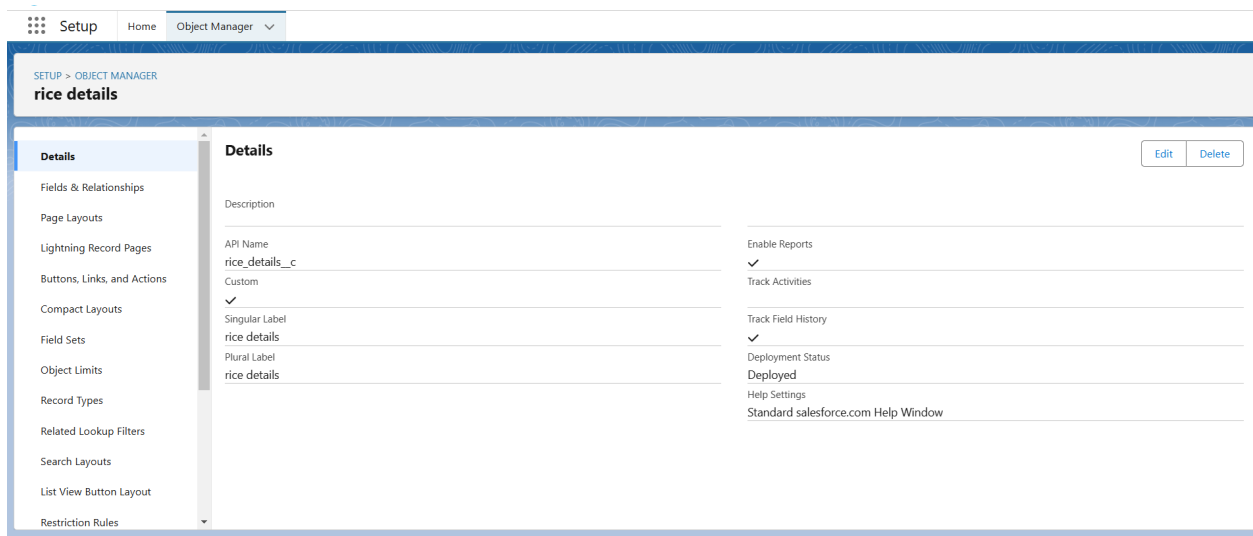
✓

Deployment Status

Deployed

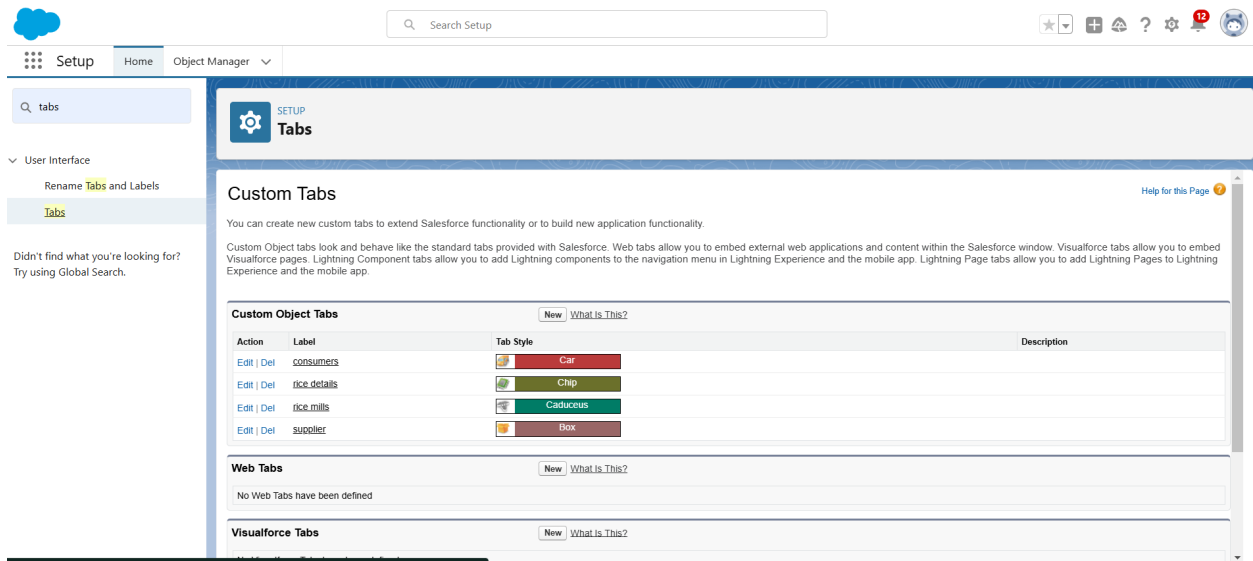
Help Settings

Standard salesforce.com Help Window

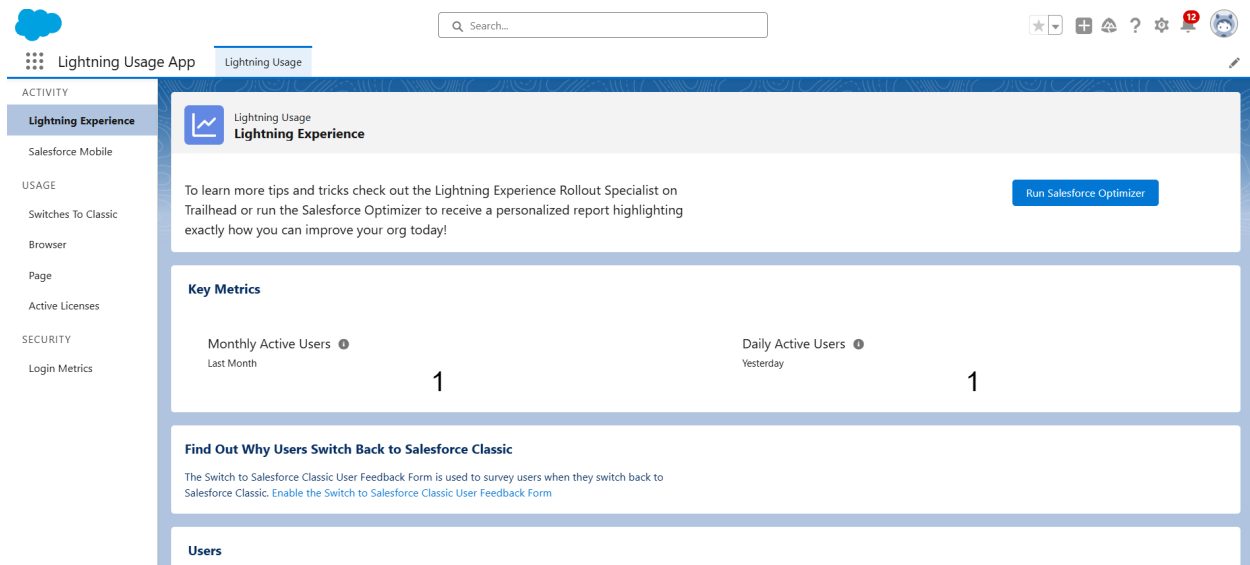


Tabs:

- **Custom Tab:** A unique tab designed for accessing critical data such as rice stock levels.
- **Remaining Tabs:** Additional tabs to navigate between objects like Suppliers, Consumers, and Reports.



Lightning app :



Fields:

Number Field in Rice Details Object: Used to log quantities for precise inventory management.

- Junction Object: Facilitates many-to-many relationships between Suppliers and Rice Details.
- Master-Detail Relationship: Links dependent objects for cascading data updates and summarization.
- Roll-Up Summary Field: Computes aggregate values like total revenue or rice supplied.
- Fields in Rice Mill Objects: Define operational metrics like daily production rates and sales.
- Fields in Consumer Objects: Include data points like total purchases and outstanding payments.
- Cross-Object Formula Field: Automatically calculates financial metrics, e.g., total cost.
- Validation Rule: Ensures critical fields like quantity and price are accurately filled.

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

Restriction Rules

Fields & Relationships

14 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid__c	Formula (Number)		
consumer Name	Name	Auto Number		✓
Consumer Name	Consumer_Name__c	Formula (Text)		
Created By	CreatedById	Lookup(User)		
email	email__c	Email		
First name	First_name__c	Text(20)		
Last Modified By	LastModifiedById	Lookup(User)		
Last name	Last_name__c	Text(20)		
Mode of payment	Mode of payment__c	Picklist		

SETUP > OBJECT MANAGER

rice 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

Fields & Relationships

6 Items, Sorted by Field Label

Q 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)		
rice details Name	Name	Auto Number		✓
rice distributed	rice_distributed__c	Number(5, 0)		
rice mill 1(one)	rice_mill__c	Master-Detail(rice mill)		✓
supplier Name	supplier__c	Master-Detail(supplier)		✓

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

Q Quick Find

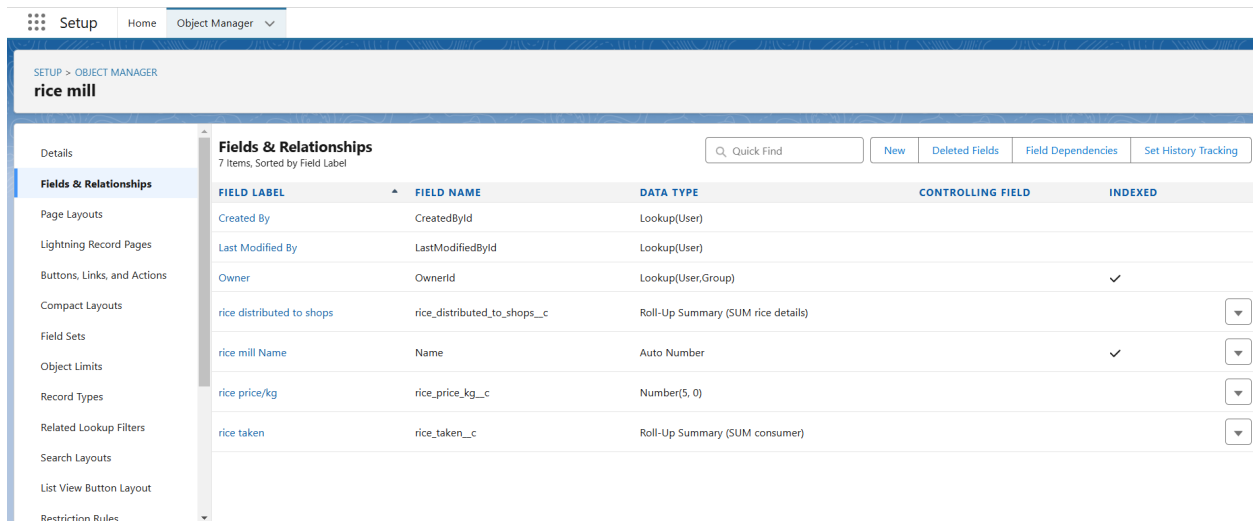
New

Deleted Fields

Field Dependencies

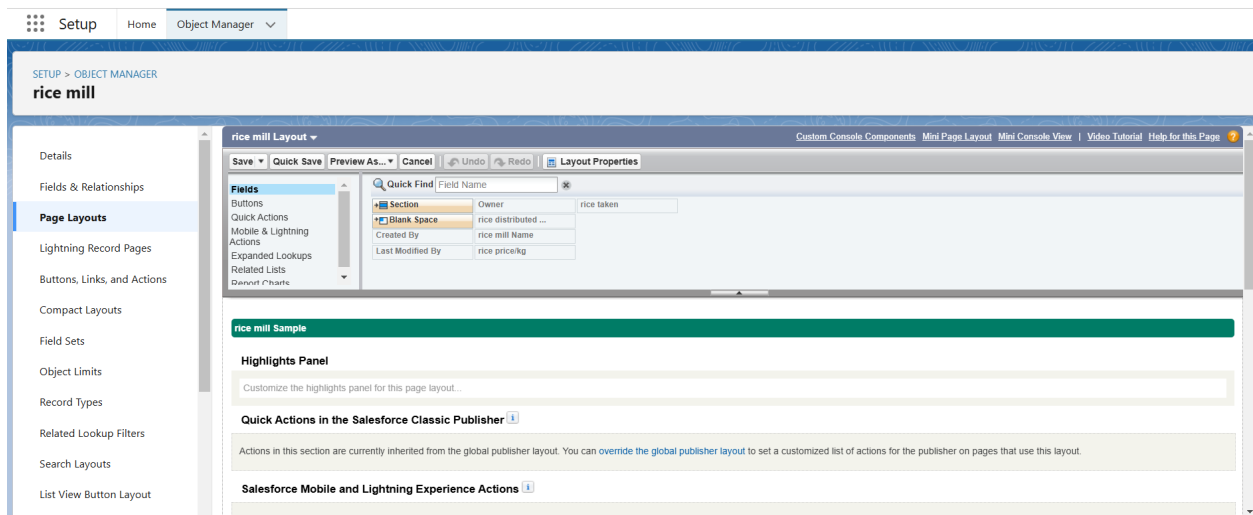
Set History Tracking

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)		✓



Page Layouts:

- Customized layouts to present relevant information for each user role (Owner, Employer, Worker).



Profiles:

Owner Profile: : Full access to all data and functionalities.

Setup	Home	Object Manager
-------	------	----------------

Setup Home

Service Setup Assistant

Commerce Setup Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

SETUP Profiles

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	✓	✓	✓	✓	□	□
Addresses	✓	✓	✓	□	□	□
AI Insight Reasons	□	□	□	□	□	□
AIMetadataSyncStatuses	□	□	□	□	□	□
AI Record Insights	✓	□	✓	✓	□	□
Alternative Payment Methods	□	□	□	□	□	□
API Anomaly Event Stores	□	□	□	□	□	□
App Analytics Query Requests	□	□	□	□	□	□
Application Usage Assignments	□	□	□	□	□	□
Appointment Categories	✓	✓	✓	□	□	□
Appointment Invitations	✓	✓	✓	□	□	□
Appointment Schedule Aggregates	□	□	□	□	□	□
Appointment Schedule Logs	□	□	□	□	□	□
Appointment Topic Time Slots	✓	✓	✓	□	□	□
Archive Job Sessions	□	□	□	□	□	□
Labels	✓	✓	✓	✓	□	□
Leads	✓	✓	✓	✓	□	□
Legal Entities	□	□	□	□	□	□
Locations	✓	✓	✓	□	□	□
Location Groups	□	□	□	□	□	□
Location Group Assignments	□	□	□	□	□	□
Location Shipping Carrier Methods	□	□	□	□	□	□
Macros	✓	□	□	□	□	□
Messaging Sessions	□	□	□	□	□	□
Messaging Users	□	□	□	□	□	□
Operating Hours	✓	✓	✓	□	□	□
Opportunities	✓	✓	✓	✓	□	□
Orders	✓	✓	✓	✓	□	□
Party Consents	✓	✓	✓	✓	□	□
Payments	□	□	□	□	□	□

Employer Profile: Limited access tailored to operational management needs

Setup	Home	Object Manager
-------	------	----------------

Setup Home

Service Setup Assistant

Commerce Setup Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

Users

Permission Set Groups

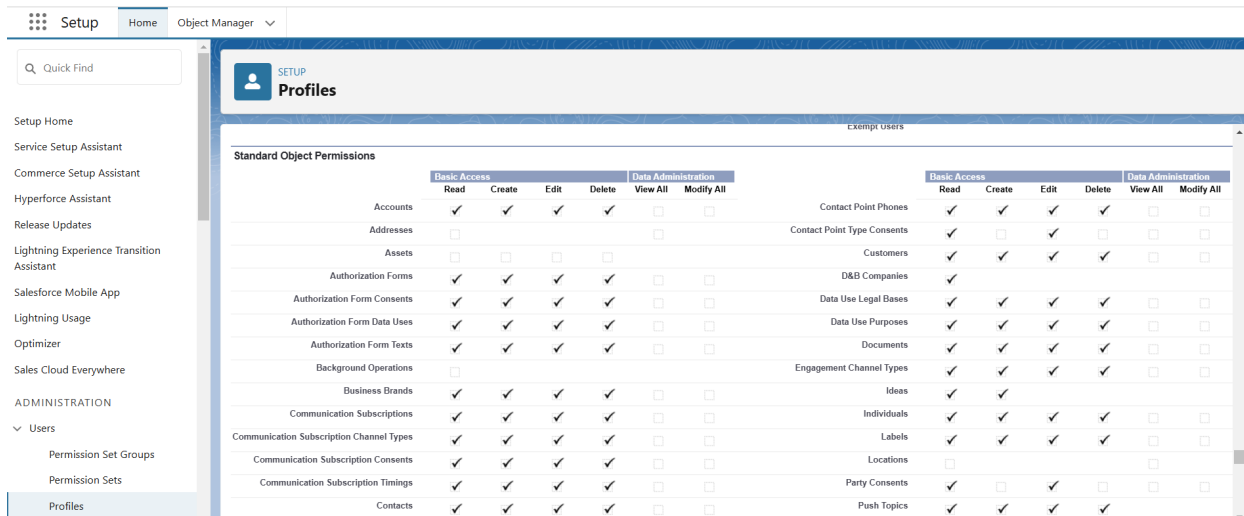
Permission Sets

Profiles

SETUP Profiles

	Read	Create	Edit	Delete	View All	Modify All
Accounts	✓	✓	✓	✓	□	□
Addresses	□	□	□	□	□	□
Assets	□	□	□	□	□	□
Authorization Forms	✓	✓	✓	✓	□	□
Authorization Form Consents	✓	✓	✓	✓	□	□
Authorization Form Data Uses	✓	✓	✓	✓	□	□
Authorization Form Texts	✓	✓	✓	✓	□	□
Background Operations	□	□	□	□	□	□
Business Brands	✓	✓	✓	✓	□	□
Communication Subscriptions	✓	✓	✓	✓	□	□
Communication Subscription Channel Types	✓	✓	✓	✓	□	□
Communication Subscription Consents	✓	✓	✓	✓	□	□
Communication Subscription Timings	✓	✓	✓	✓	□	□
Contacts	✓	✓	✓	✓	□	□
Contact Point Addresses	□	□	□	□	□	□
Contact Point Consents	✓	✓	✓	✓	□	□
Contact Point Phones	✓	✓	✓	✓	□	□
Contact Point Type Consents	✓	□	✓	□	□	□
Customers	✓	✓	✓	✓	□	□
D&B Companies	✓	✓	✓	✓	□	□
Data Use Legal Bases	✓	✓	✓	✓	□	□
Data Use Purposes	✓	✓	✓	✓	□	□
Documents	✓	✓	✓	✓	□	□
Engagement Channel Types	✓	✓	✓	✓	□	□
Ideas	✓	✓	✓	✓	□	□
Individuals	✓	✓	✓	✓	□	□
Labels	✓	✓	✓	✓	□	□
Locations	□	□	□	□	□	□
Party Consents	✓	□	✓	□	□	□
Push Topics	✓	✓	✓	✓	□	□
Sellers	✓	✓	✓	✓	□	□
Streaming Channels	✓	✓	✓	✓	□	□

Worker Profile: Restricted access for task-specific data viewing.



Role & Role Hierarchy:

- **Owner Role:** Top-level role with complete visibility and control over all records within the organization.
- **Employer Roles:** Mid-level roles that have access to specific operational data, such as department or team-level information, and manage employees or specific operational processes.
- **Worker Role:** Entry-level or operational role with restricted access to specific records or data. This role may have visibility limited to the records they are directly involved with, such as their tasks, projects, or cases, without visibility into higher-level operational data.

Setup Home Object Manager

roles

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

Didn't find what you're looking for?
Try using Global Search.

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy

View other sample Role Hierarchies: Territory-based Sample

* View & edit data, roll up forecasts, & generate reports for all users below
* Can't access data of other Executive Staff

* View & edit data, roll up forecasts, & generate reports for all users directly below
* Can't access data of users above or at same level

* View & edit data, roll up forecasts, & generate reports only for own data
* Can't access data of users above or at same level

Set Up Roles

☐ Don't show this page again

Users:

- User accounts with appropriate permissions based on role hierarchy.
- Additional users added for extended workforce access.

Setup Home Object Manager

User

Users

User: vicky y

Permission Set Assignments (0) | Permission Set Assignments Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Apps (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0) | User Provisioning Accounts (0)

User Detail

Edit Sharing Reset Password Freeze View Summary

Name	vicky y	Role	owner
Alias	vy	User License	Salesforce
Email	chandana902@gmail.com Verify	Profile	owner
Username	chandana902@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	vicky i	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i

SETUP

Users

Alias	rram	User License	Salesforce Platform
Email	chandanagd02@gmail.com [Verify] i	Profile	Standard Platform User
Username	chandana02@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	ram i	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> i
App Registration: One-Time Password Authenticator	i	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> i
App Registration: Salesforce Authenticator	i	Salesforce CRM Content User	<input checked="" type="checkbox"/>
Security Key (U2F or WebAuthn)	i	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Lightning Login	i	Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>

SETUP

Users

User

ragu raj

[User Profile Help for this Page](#)

[Permission Set Assignments \(0\)](#) |
 [Permission Set Assignments: Activation Required \(0\)](#) |
 [Permission Set Group Assignments \(0\)](#) |
 [Permission Set License Assignments \(0\)](#) |
 [Personal Groups \(0\)](#) |
 [Public Group Membership \(0\)](#) |
 [Queue Membership \(0\)](#) |
 [Team \(0\)](#) |
 [Managers in the Role Hierarchy \(2\)](#) |
 [OAuth Apps \(0\)](#) |
 [Third-Party Account Links \(0\)](#) |
 [Installed Mobile Apps \(0\)](#) |
 [Authentication Settings for External Systems \(0\)](#) |
 [Login History \(0\)](#) |
 [User Provisioning Accounts \(0\)](#)

User Detail

[Edit](#)
[Sharing](#)
[Reset Password](#)
[Freeze](#)
[View Summary](#)

Name	ragu raj	Role	worker
Alias	rraj	User License	Salesforce Platform
Email	chandanagd02@gmail.com [Verify] i	Profile	Standard Platform User
Username	chandanago@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	raju i	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
		Debug Mode	<input type="checkbox"/> i

Permission Sets:

- OWD Setting: Organization-wide defaults configured for data security and selective sharing.

Setup

HomeObject Manager

Qshari

Security

Guest UserSharing Rule AccessReport

Sharing Settings

Didn't find what you're looking for? Try using Global Search.

SETUPSharing Settings

Shipping Carrier

Public Read Only

Private

Shipping Carrier Method

Public Read Only

Private

Shipping Configuration Set

Public Read Only

Private

Streaming Channel

Public Read/Write

Private

Tableau Host Mapping

Public Read Only

Private

Waitlist

Private

Private

Web Cart Document

Private

Private

Work Order

Private

Private

Work Plan

Private

Private

Work Plan Template

Private

Private

Work Step Template

Private

Private

Work Type

Private

Private

Work Type Group

Public Read/Write

Private

rice mill

Public Read Only

Private

supplier

Public Read Only

Private

Other Settings

Standard Report Visibility

Manual User Record Sharing

Manager Groups

Secure guest user record access

Require permission to view record names in lookup fields

Save

Cancel

Reports:

- Create Report: Tracks key performance metrics like sales and production.
- Sharing Report to Owner: Automated report sharing for timely insights.
- Create a Report Folder: Organized storage for easy access to historical reports.

Lightning Usage App

Lightning Usage

range of amount per day

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

4

146

5,207.00

<input type="checkbox"/> Rice taken by shops	consumer: consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
<input type="checkbox"/> 12 (1)	consumers-002	normal rice	46	UPI	552.00
Subtotal			46		552.00
<input type="checkbox"/> 13 (1)	consumers-003	basmati	9	Net banking	117.00
Subtotal			9		117.00
<input type="checkbox"/> 14 (1)	consumers-001	basmati	40	Cash	560.00
Subtotal			40		560.00
<input type="checkbox"/> 78 (1)	consumers-004	normal rice	51	Debit card	3,978.00
Subtotal			51		3,978.00
Total (4)			146		5,207.00

Row Counts

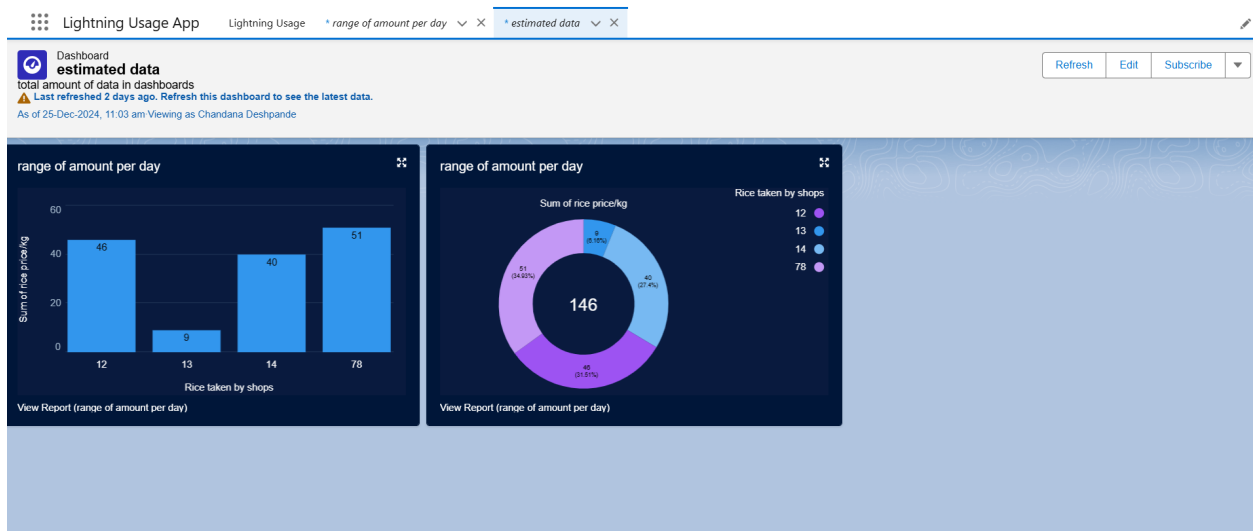
Detail Rows

Subtotals

Grand Total

Dashboards:

- **Dashboard Folder:** Centralized repository for operational dashboards.
- **Dashboard:** Visual representation of KPIs such as daily sales and revenue.



5. Testing and Validation

APEX:

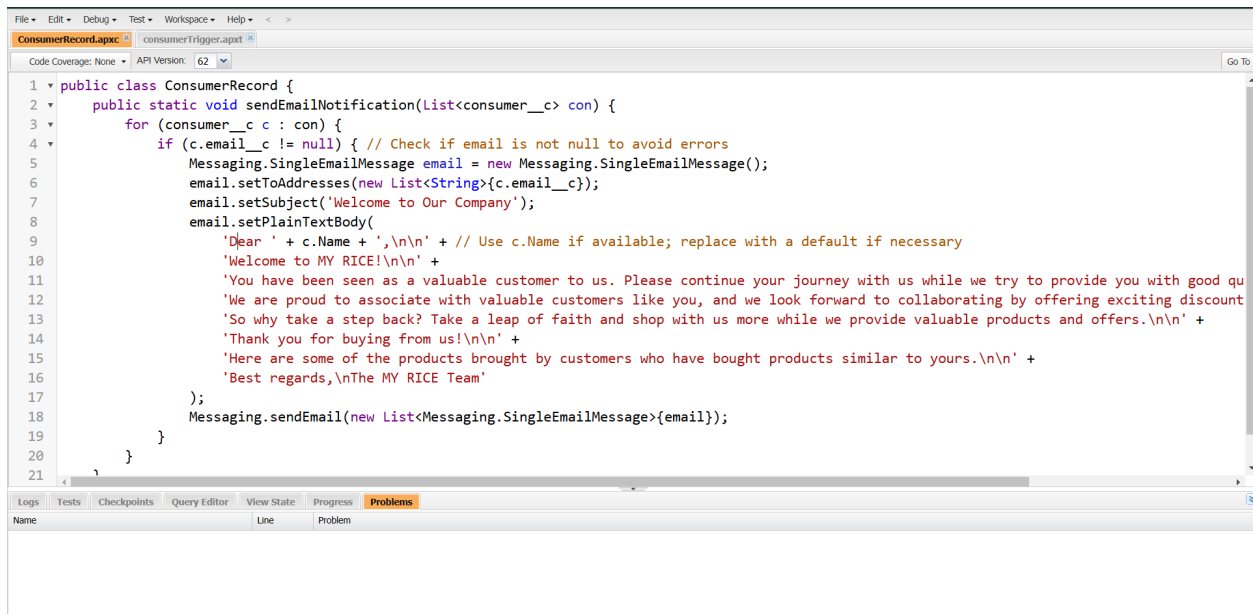
Apex Class:

ConsumerRecord Purpose: The ConsumerRecord Apex class is designed to send personalized email notifications to a list of consumers in Salesforce. It is specifically used to send a welcome email to each consumer, expressing appreciation for their business and informing them about the company's offerings, including discounts and product recommendations.

Functionality:

- The class defines a static method `sendEmailNotification`, which accepts a list of `consumer__c` records as input.
- It iterates over the provided list of consumers and for each consumer:

- An email is created using the Messaging.SingleEmailMessage class.
- The email is addressed to the consumer's email address (retrieved from the email__c field).
- The subject of the email is set to "Welcome to our company."
- The email body includes a personalized message welcoming the consumer to the company, offering them discounts, and encouraging continued shopping with the company.
- Once the email message is prepared, it is sent using the Messaging.sendEmail method.
- records.



```

1 public class ConsumerRecord {
2     public static void sendEmailNotification(List<consumer__c> con) {
3         for (consumer__c c : con) {
4             if (c.email__c != null) { // Check if email is not null to avoid errors
5                 Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
6                 email.setToAddresses(new List<String>{c.email__c});
7                 email.setSubject('Welcome to Our Company');
8                 email.setPlainTextBody(
9                     'Dear ' + c.Name + ',\n\n' + // Use c.Name if available; replace with a default if necessary
10                     'Welcome to MY RICE!\n\n' +
11                     'You have been seen as a valuable customer to us. Please continue your journey with us while we try to provide you with good qu
12                     'We are proud to associate with valuable customers like you, and we look forward to collaborating by offering exciting discount
13                     'So why take a step back? Take a leap of faith and shop with us more while we provide valuable products and offers.\n\n' +
14                     'Thank you for buying from us!\n\n' +
15                     'Here are some of the products brought by customers who have bought products similar to yours.\n\n' +
16                     'Best regards,\n\nThe MY RICE Team'
17                 );
18                 Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
19             }
20         }
21     }
22 }

```

Apex Trigger:

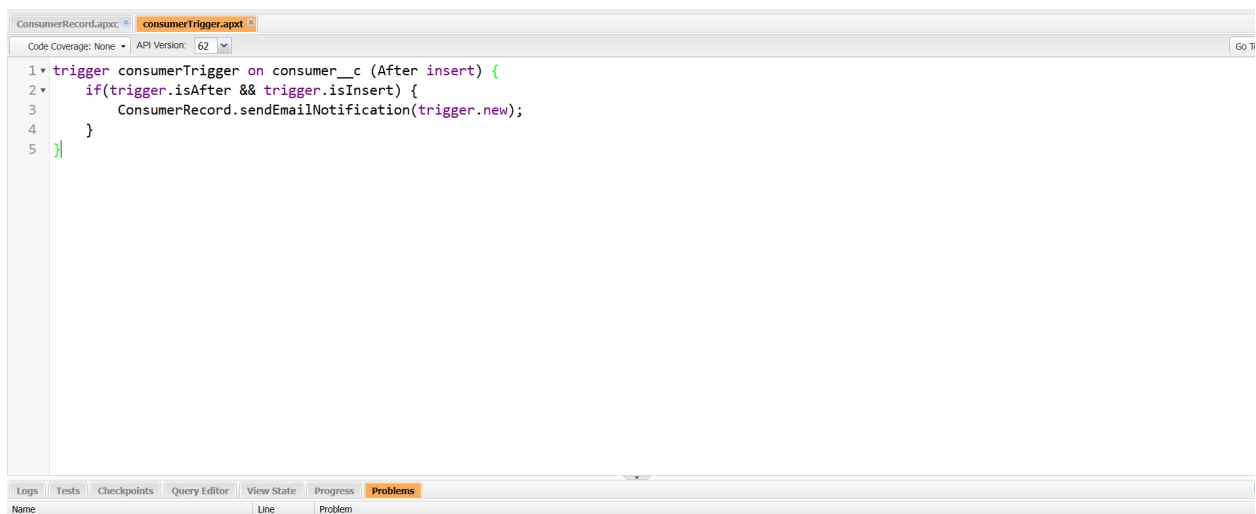
consumerTrigger Purpose:

The consumerTrigger Apex trigger is designed to automatically invoke the sendEmailNotification method from the ConsumerRecord Apex class after a new consumer__c record is inserted into Salesforce. The trigger is set to run after

insert, ensuring that a welcome email is sent to the consumer immediately upon record creation. ensuring that a welcome email is sent to the consumer immediately upon record creation.

Functionality:

- The trigger is set to fire after an insert event on the consumer__c object.
- When a new consumer record is added, the trigger invokes the sendEmailNotification method from the ConsumerRecord class.
- The trigger.new context variable, which contains the list of newly inserted consumer__c records, is passed to the sendEmailNotification method.
- The method sends personalized email notifications to the consumers, welcoming them and offering further company resources and promotions.



6. Conclusion

Summary of Achievements:

- Successfully developed a user-friendly CRM application for wholesale rice mills.
- Streamlined daily operations with automated reporting and role-based access control.
- Improved decision-making through actionable insights and real-time data

visualization.

- Enhanced understanding of Salesforce features such as rollup summary fields, validation rules, and dashboards.