

A CRM APPLICATION FOR WHOLESALE RICE MILL REPORT

PREPARED BY

GANESH SRUNGAVARAPU

A CRM Application for Wholesale Rice Mill

1. Project Overview

The Rice Mill CRM Application is a comprehensive solution designed to streamline and optimize the daily operations of a rice mill factory. The primary objective is to track and report daily rice production, sales, and revenue while providing valuable insights to stakeholders. This project leverages Salesforce's capabilities, including custom objects,

workflows, and dashboards, to enhance operational efficiency, improve customer satisfaction, and ensure data accuracy. Through this initiative, we aim to provide a centralized platform for managing and analyzing rice mill activities, empowering the organization to make data-driven decisions and achieve long-term growth. Key aspects of the project include automated reporting, role-based access control, and data visualization, all tailored to the unique requirements of a wholesale rice mill.

2. Objectives Business Goals:

- Enhance operational transparency for the rice mill owner.
- Automate the generation of daily reports for production, sales, and revenue.
- Improve customer experience by providing personalized updates and insights.
- Provide role-based data access for improved security and accountability.

Specific Outcomes:

- Enable automated tracking of rice supply, sales, and revenue through custom reports and dashboards.
- Improve decision-making by providing detailed analytics on customer preferences and product performance.
- Streamline operational workflows using master-detail relationships, roll-up summary fields, and formula fields.
- Establish efficient communication channels with consumers through email notifications.

3. Salesforce Key Features and Concepts Utilized

1. Custom Objects:

- Supplier Object: Manages supplier details, including total rice supplied.
- Rice Mill Object: Tracks daily operations, rice inventory, and pricing.
- Consumer Object: Stores customer information, rice purchases, and payment details.
- Rice Details Object: Captures granular data on rice types, quantities, and transactions.

1. Roll-Up Summary Fields:

- Summarize data such as total rice supplied to a mill or total rice taken by shops.

1. Cross-Object Formula Fields:

- Calculate total payment amounts (e.g., Rice Taken by Shops × Price per Kilogram).

1. Validation Rules:

- Ensure data integrity by validating fields such as phone numbers, email addresses, and mandatory entries.

1. Permission Sets and Role Hierarchy:

- Implement role-based access control:

- Owners can access all data.
- Employers can view worker records and related data.
- Workers have restricted access to update daily transactions.

1. Reports and Dashboards:

- Generate daily summaries and visualize performance metrics, such as revenue trends and inventory levels, through bar and donut charts.

1. Apex Classes and Triggers:

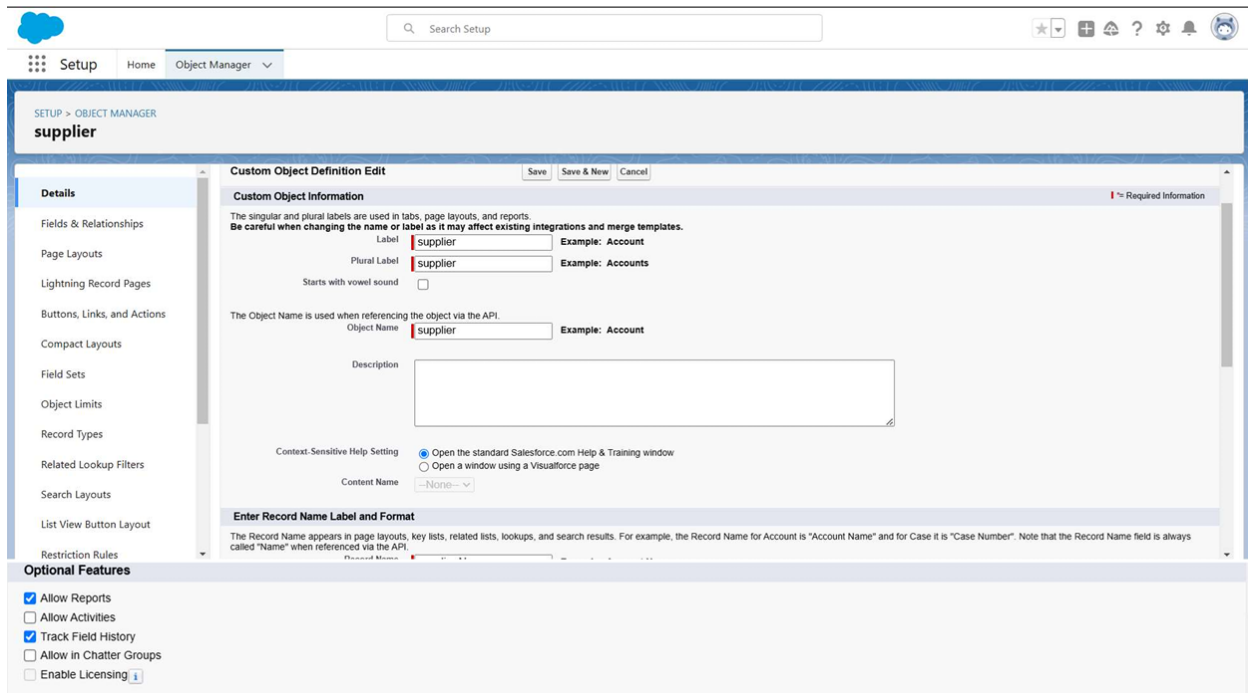
- Automate email notifications to customers, enhancing communication and engagement.

4. Step-by-Step Implementation Creating Developer Account:

1. Visit Salesforce Developer Signup.
2. Fill in the required details: Name, Email, Role (Developer), Company, and Username (e.g., username@organization.com).
3. Verify the account through the email received and set up your password.

Objects: Create Supplier Object:

- Navigate to Object Manager > Create > Custom Object.
- Label Name: Supplier; Plural Label: Suppliers.
- Enable "Allow Reports" and "Track Field History."
- Save the object.



The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and various utility icons. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area is titled 'SETUP > OBJECT MANAGER' and 'supplier'. It displays the 'Custom Object Definition Edit' page for the 'supplier' object. The page is divided into several sections: 'Details' (with a sidebar menu for Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout), 'Custom Object Information' (with tabs for Details, Fields, and Relationships), and 'Optional Features'. The 'Custom Object Information' section includes fields for Label (supplier), Plural Label (suppliers), Starts with vowel sound (unchecked), Object Name (supplier), and Description. It also has a 'Context-Sensitive Help Setting' section with radio buttons for 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'. The 'Optional Features' section at the bottom has checkboxes for 'Allow Reports' (checked), 'Allow Activities' (unchecked), 'Track Field History' (checked), 'Allow in Chatter Groups' (unchecked), and 'Enable Licensing' (unchecked).

Create Rice Mill Object:

- Label Name: Rice Mill; Plural Label: Rice Mills.
- Record Name: Auto Number (e.g., Rice-{000}); Starting Number: 1.

- Enable "Allow Reports" and "Track Field History."
- Save the object.

The screenshot shows the 'Custom Object Definition Edit' page in Salesforce. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The page title is 'Object Manager'. The main section is 'Custom Object Information' with a 'Required Information' warning icon. It contains fields for 'Label' (rice mill), 'Plural Label' (rice mills), 'Starts with vowel sound' (unchecked), and 'Object Name' (rice_mill). Below this is the 'Optional Features' section with checkboxes for 'Allow Reports' (checked), 'Allow Activities' (unchecked), 'Track Field History' (checked), 'Allow in Chatter Groups' (unchecked), and 'Enable Licensing' (unchecked).

Create Consumer Object:

- Label Name: Consumer; Plural Label: Consumers.
- Record Name: Auto Number (e.g., Consumers-{000}); Starting Number: 1
- Save and enable search functionality.

The screenshot shows the 'Custom Object Definition Edit' page for a custom object named 'consumer'. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The page title is 'Object Manager'. The main section is 'Custom Object Information' with a 'Required Information' warning icon. It contains fields for 'Label' (consumer), 'Plural Label' (consumers), 'Starts with vowel sound' (unchecked), and 'Object Name' (consumer). Below this is the 'Optional Features' section with checkboxes for 'Allow Reports' (checked), 'Allow Activities' (unchecked), 'Track Field History' (checked), 'Allow in Chatter Groups' (unchecked), and 'Enable Licensing' (unchecked). The 'Context-Sensitive Help Setting' section has two radio buttons: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page' (unchecked). The 'Content Name' field is set to 'None'.

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name Example: Account Name

Data Type Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Display Format Example: A-{0000} [What Is This?](#)

Optional Features

- ☒ Allow Reports
- ☐ Allow Activities
- ☒ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing [i](#)

Create Rice Details Object:

- Label Name: Rice Details; Plural Label: Rice Details.
- Record Name: Auto Number (e.g., Rice-{000}); Starting Number: 1.
- Save and enable search functionality.

rice details

Custom Object Definition Edit

SaveSave & NewCancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label

Example: Account

Plural Label

Example: Accounts

Starts with vowel sound

☐

The Object Name is used when referencing the object via the API.

Object Name

Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name

Example: Account Name

Data Type

Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Display Format

Example: A-{0000} [What Is This?](#)

Optional Features

☒ Allow Reports
☐ Allow Activities
☒ Track Field History
☐ Allow in Chatter Groups
☐ Enable Licensing [i](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

☒ Allow Sharing
☒ Allow Bulk API Access
☒ Allow Streaming API Access

Deployment Status

[What Is This?](#)

Tabs: Creating a Custom Tab:

- Go to Setup > Tabs > New Custom Tab.
- Select the object (e.g., Supplier) and choose a tab style.
- Assign it to the appropriate profiles and save.

Edit Custom Object Tab
consumers

Fill in the fields below to define the custom tab.

Custom Tab Definition Edit

Custom Object Tab Information


Tab Label

consumers

Object

consumer

Tab Style

 People

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link

--None--

Enter a short description.

Description


Save


Cancel


Tab Style Selector


Create your own style


Hide styles which are used on other tabs


 Airplane


 Alarm clock


 Apple


 Balls


 Bank


 Bell


 Big top


 Boat


 Books


 Bottle


 Box[1]


 Bridge


 Building


 Building Block


 Caduceus

 Camera

 Can





 Car

 Castle

 CD/DVD

Creating Remaining Tabs:

- Repeat the above steps for Rice Mill, Consumer, and Rice Details objects.

Custom Object Tabs			
		New	What Is This?
Action	Label	Tab Style	Descri
Edit Del	consumers	 People	
Edit Del	rice details	 Form	
Edit Del	rice mills	 Factory	
Edit Del	supplier	 Box	

Web Tabs	
New	What Is This?

The Lightning App:

Create a Lightning App:

- Navigate to Setup > Search for 'App Manager' > New Lightning App.
- Enter app details (e.g., Name: My Rice CRM) and customize branding.

- Add navigation items: Supplier, Rice Mill, Consumer, and Rice Details.
- Save and assign profiles.

Lightning App Builder
App Settings
Pages
MY RICE

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 ¹

* Developer Name ¹

Description ¹

App Branding

Image ¹
Primary Color Hex Value ¹




Clear

Org Theme Options

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

App Launcher Preview



MY RICE
Rice Details

Lightning App Builder
App Settings
Pages
MY RICE

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 its 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

- Accounts
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests

Selected Items

- supplier
- consumers
- rice details
- rice mills

App Settings

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

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Analytics Cloud Integration User
Analytics Cloud Security User

Selected Profiles

System Administrator
employer
worker

Fields:

Creating the Rice Distributed Field in Rice Details Object:

- Go to the setup page >> click on object manager >> From drop down click edit for rice details object
- Click on fields & relationship >> click on New.
- Field Name: Rice Distributed; Data Type: Number; Length: 5.
- Save the field.

Edit rice details Custom Field
rice distributed

Custom Field Definition Edit

Change Field Type Save Cancel

Field Information

Field Label

rice distributed

Data Type

Number

Field Name

rice_distributed

Description

rice_distributed

Help Text

rice_distributed_to_shops

Data Owner

User

Field Usage

--None--

Data Sensitivity Level

--None--

Compliance Categorization

Available

PII
HIPAA
GDPR
PCI

Chosen

reference a field from a Custom Metadata type record use: \$CustomMetadata.type__myRecord

Lumber Options

Length

5

Decimal Places

0

Change Field Type

Save

Cancel

Creating Junction Object:

- Create relationships between Supplier and Rice Details, and Rice Mill and Rice Details using master-detail relationships.

- Go to the setup page >> click on object manager >> From drop down click edit for rice details object.

Creating a Master-Detail Relationship: • Example: Between Consumer and Rice Mill. • **Field Label:**

Rice Mill Name; Data Type: Master-Detail.

- Go to the setup page >> click on object manager >> From drop down click edit for consumer object.
- Click on fields & relationship >> click on New , Select “Master-Detail relationship” as data type and click Next.
- Select the related object “rice mill”. Give Field Label as “rice mill name” and click Next. Next >> Next >> Save.

rice mill name

Creating the Roll-Up Summary:

- Summarize fields like total rice distributed in Supplier and Consumer objects.
- Use SUM as the aggregation type.

Edit supplier Custom Field
sum of rice distributed

Custom Field Definition Edit	
Field Information	
Field Label	sum of rice distributed
Field Name	sum_of_rice_distributed
Description	
Help Text	
Data Owner	User

Roll-Up Summary Options

Data Type	Roll-Up Summary
Calculation Options	<input checked="" type="radio"/> Automatic calculation (Recommended)
	<input type="radio"/> Force a mass recalculation of this field

Select Object to Summarize

Master Object	Summarized Object
supplier	rice details

Select Roll-Up Type

<input type="radio"/> COUNT	
<input checked="" type="radio"/> SUM	Field to Aggregate: rice distributed
<input type="radio"/> MIN	
<input type="radio"/> MAX	

Filter Criteria

<input checked="" type="radio"/> All records should be included in the calculation
<input type="radio"/> Only records meeting certain criteria should be included in the calculation

Save Cancel

Creating Fields in Objects:

- Add fields like Price per Kilogram, Rice Type (Picklist), and Mode of Payment (Picklist) in respective objects. Go to the setup page >> click on object manager >> From drop down click edit for rice details object.
- Click on fields & relationship >> click on New.
- Select Data type as "master detail" and click Next.
- Given the Field Label as "supplier name" and length as "5"

supplier Name

Have feedback on lookup filters? [Comment on this](#)

Custom Field Definition Edit	
Field Information	
Field Label	supplier Name
Field Name	supplier
Description	
Help Text	
Data Owner	User
Field Usage	--None--
Data Sensitivity Level	--None--
Master-Detail Options	
Related To	supplier
Related List Label	rice details
Sharing Setting	Select the minimum access level required on the Master record to create, edit, or delete related Detail records: <input type="radio"/> Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records. <input checked="" type="radio"/> Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
Allow reparenting	<input type="checkbox"/> Child records can be reparented to other parent records after they are created

Creating Cross-Object Formula Field in Consumer Object:

- Field Name: Amount Paid; Formula: Rice_Taken_by_Shops__c *Rice_Price_per_Kg__c.
- Save the formula.

The screenshot shows the 'Field Information' form for creating a new field. The 'Field Label' is 'Amount Paid' and the 'Field Name' is 'Amount_Paid'. The 'Description' and 'Help Text' fields are empty. Below these fields, there is a section for entering the formula. The 'Simple Formula' tab is selected, and the formula entered is 'rice_taken_by_shops_in_kgs__c * rice_mill_name__r.rice_price_kg__c'. To the right of the formula entry area, there is a 'Functions' dropdown menu showing a list of functions including ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. The 'Insert Operator' dropdown is also visible.

Creating the Validation Rule:

- Example: For phone number/email validation in Consumer object.
- Formula: OR(ISBLANK(Phone_Number__c), ISBLANK(Email__c)).
- Error Message: "Phone number or email cannot be blank."

The screenshot shows the 'Validation Rule Edit' form. The 'Rule Name' is 'Phone number or email blank rule'. The 'Active' checkbox is checked. The 'Description' is 'phone number and email number should not be blank'. Below this, the 'Error Condition Formula' section shows the formula 'OR(ISBLANK(Phone_number__c) , ISBLANK(email__c))'. To the right of the formula entry area, there is a 'Functions' dropdown menu showing a list of functions including ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. The 'Insert Operator' dropdown is also visible. Below the formula entry area, the 'Error Message' section shows the message 'please fill in your phone number.' and the 'Error Location' is set to 'Top of Page'.

Page Layouts: Creating the Page Layout:

- Navigate to Object Manager > Select Object(consumer) > Page Layouts > New.
- Customize sections:
 - Personal Details: Name, Phone, Email.
 - Rice Details: Rice Type, Quantity.
 - Payment Details: Mode of Payment, Amount Paid.

- Save and assign the layout to profiles.

Create New Page Layout

As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard se

Existing Page Layout: custom page

Page Layout Name: customer layout

Save Cancel

Section Properties

Section Name: personal details

Display Section Header On: ☒ Detail Page ☒ Edit Page

Layout: ☐ 1-Column ☒ 2-Column

Tab-key Order: ☒ Left-Right ☐ Top-Down

OK Cancel

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Quick Find: Field Name

Field Name	Field Name	Field Name	Field Name
Section	Consumer Name	Last Modified By	rice mill name
Blank Space	Created By	Last name	Rice taken by shops
Amount Paid	email	Mode of payment	rice taken by sho...
consumer Name	First name	Phone number	Rice type

consumer Detail

Standard Buttons: Edit Delete Clone Change Owner Change Record Type Printable View Edit Labels Custom Buttons

Personal details

First name: Sample Text

Last name: Sample Text

Consumer Name: Sample Text

Phone number: 1-415-555-1212

email: sarah.sample@company.com

rice mill name: Sample Text

rice details

rice taken by shops in kgs: 85,037

Rice type: Sample Text

Rice taken by shops: 40,403

Profiles:

Owner Profile:

- Clone Standard User profile and rename it as Owner.
- Grant full access to all objects and tabs.

owner

Set the permissions and page layouts for this profile.


Profile Edit Save Save & New Cancel

Name: owner

User License: Salesforce

Description:

Custom Profile: ☒



SETUP

Profiles


Custom Object Permissions

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	purchasers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asset Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	reviews	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	rice details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	rice mills	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Brokers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SolarBots	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
consumers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	SolarBot Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	studs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
energy audits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	super marts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
nick names	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	suppliers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
positions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	teachers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	tickets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ProjectTasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	vendors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Properties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							

Session Settings

Employer Profile:

- Clone Standard Platform User profile and rename it as Employer.
- Restrict access to certain objects like Workers.



SETUP

Profiles

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	purchasers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asset Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	reviews	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	rice details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	rice mills	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brokers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SolarBots	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
consumers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SolarBot Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	studs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
energy audits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	super marts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
nick names	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	suppliers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
positions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	teachers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	tickets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ProjectTasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	vendors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Properties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							

Worker Profile:

- Clone Standard Platform User profile and rename it as Worker.
- Allow limited access to update transactions only.

SETUP Profiles		Basic Access				Data Administration	
		Read	Create	Edit	Delete	View All	Modify All
Assets		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asset Services		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
books		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
books		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brokers		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
consumers		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employees		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
energy audits		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item details		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
nick names		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
positions		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Projects		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
purchasers		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
reviews		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
rice details		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
rice mills		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SolarBots		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SolarBot Status		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
studs		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
students		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
super marts		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
suppliers		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
teachers		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
tickets		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Role & Role Hierarchy:

Creating Owner Role:

- Go to Setup > Roles > Set Up Roles.
- Click on Add Role under CEO and Give Label as “owner” and Role name gets auto populated.
- Role Label: Owner; Save the role.

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

VIT University Bhopal

[Add Role](#)

CEO [Edit](#) | [Del](#) | [Assign](#)

[Add Role](#)

CEO [Edit](#) | [Del](#) | [Assign](#)

[Add Role](#)

COO [Edit](#) | [Del](#) | [Assign](#)

[Add Role](#)

owner [Edit](#) | [Del](#) | [Assign](#)

[Add Role](#)

Creating Employer Roles:

- Add a new role under Owner:
- Role Label: Employer; Save the role.

owner [Edit](#) | [Del](#) | [Assign](#)

[Add Role](#)

employer [Edit](#) | [Del](#) | [Assign](#)

[Add Role](#)

Creating Worker Roles:

- Add a role under Employer:
- Role Label: Worker; Save the role.



Users:

Create User:

- Go to Setup > Users > New User.
- Enter details (e.g., Name: Arshad Y; Role: Owner).

New User Reset Password(s) Add Multiple Users						
<input type="checkbox"/> Action	Full Name *	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Badi Bazz Arshad	Badi	arshad@techcure.com	owner	✓	owner
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter.00000000000000000000000000000000@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Khan Afraz	Afraz	afraz@techcure.com	employer	✓	Standard Platform User
<input type="checkbox"/> Edit	Meer Syed Maaz	SM Meer	@vishvcoatl.ac.in		✓	System Administrator
<input type="checkbox"/> Edit	Sheik Tofik	Tofik	tofik@techcure.com	worker	✓	Standard Platform User
<input type="checkbox"/> Edit	User Integration	integ	integration@00000000000000000000000000000000@techcure.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00000000000000000000000000000000@techcure.com		✓	Analytics Cloud Security User
New User Reset Password(s) Add Multiple Users						

Create Another User:

- Repeat for Afraz (Role: Employer).

User Edit: Afraz Khan

Save | Save & New | Cancel

General Information

First Name: Afraz

Last Name: Khan

Alias: Afraz

Email: afraz@techcure.com

Username: afraz@techcure.com

Nickname: Afraz

Role: employer

User License: Salesforce Platform

Profile: Standard Platform User

Active: ☒

Marketing User: ☐

Offline User: ☐

Create Another User:

- Repeat for Tofik (Role: Worker).

Tofik Sheik

User Edit: Tofik Sheik

Save | Save & New | Cancel

General Information

First Name: Tofik

Last Name: Sheik

Alias: Tofik

Email: tofik@techcure.com

Username: tofik@techcure.com

Nickname: TofikCure

Role: worker

User License: Salesforce Platform

Profile: Standard Platform User

Active: ☒

Marketing User: ☐

Offline User: ☐

Permission Sets:

Creating OWD Setting:

- Go to Setup > type 'Sharing Settings' in Quik search box.
- Set default internal access to "Public Read Only" for Rice Mill and Supplier objects.

Select a Report Type

Q rice mills with

Showing results for rice mills with

Report Type Name	Category	
rice mills with consumers	Standard	▼
rice mills with rice details and supplier	Standard	▼

Details

 **rice mills with consumers**
Standard Report Type

Start Report



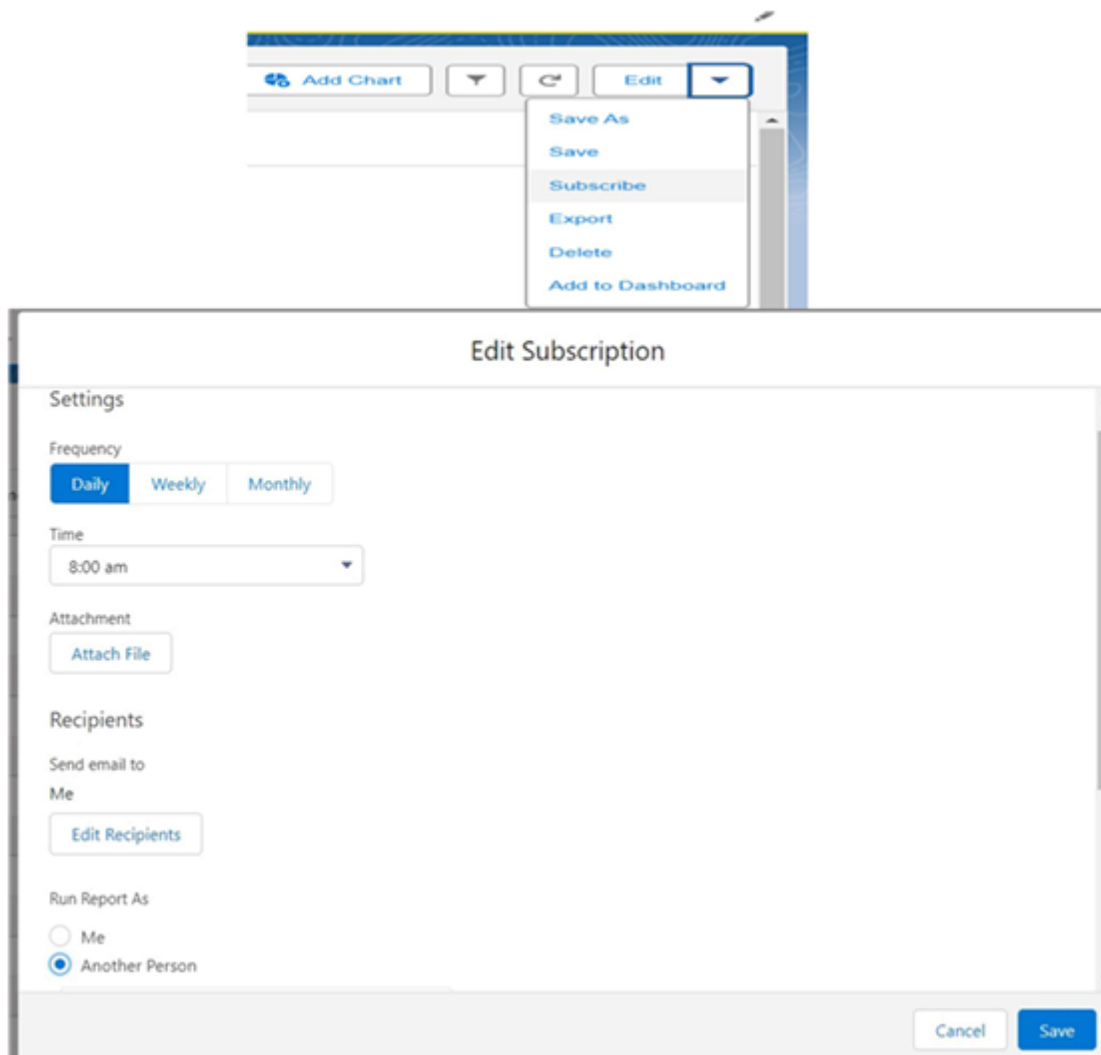
 Details

 Fields (32)

Sharing Report to Owner:

1. Go to the created report, click on the dropdown menu next to the report name.
2. Select Subscribe.
3. In the settings window, choose:
 - Send report as another user (Owner's email).
 - Set the frequency as Daily.
4. Click Save.

The owner will receive a daily email with updated rice mill data.



Create Report Folder:

1. Go to Reports from the App Launcher.
2. Click on New Folder.
3. Name the folder: "Estimated Rice Per Day."
4. Move the created report Range of Amount Per Day into this folder:
 - Select the report dropdown.
 - Choose Move > Select folder: Estimated Rice Per Day > Save.

criptio

On

3, 2:09 pm

3, 2:09 pm

3, 2:09 pm

3, 2:09 pm

23, 2:41 pm

23, 10:49 am

ch flow

ach into

s take

ens?

Create folder

* Folder Label

estimated rice per day

* Folder Unique Name

estimatedriceperday

Cancel Save

MY RICE

supplier

rice mills

rice details

consumers

Recent | Dashboards

Search...

Search recent dashboards...

New Dashboard

New Folder

1 Item

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	estimated data	total amount of data in dashboards	amount data	GANESH SRUNGAVARAPU	28/12/2024, 3:58 pm	

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

Dashboards

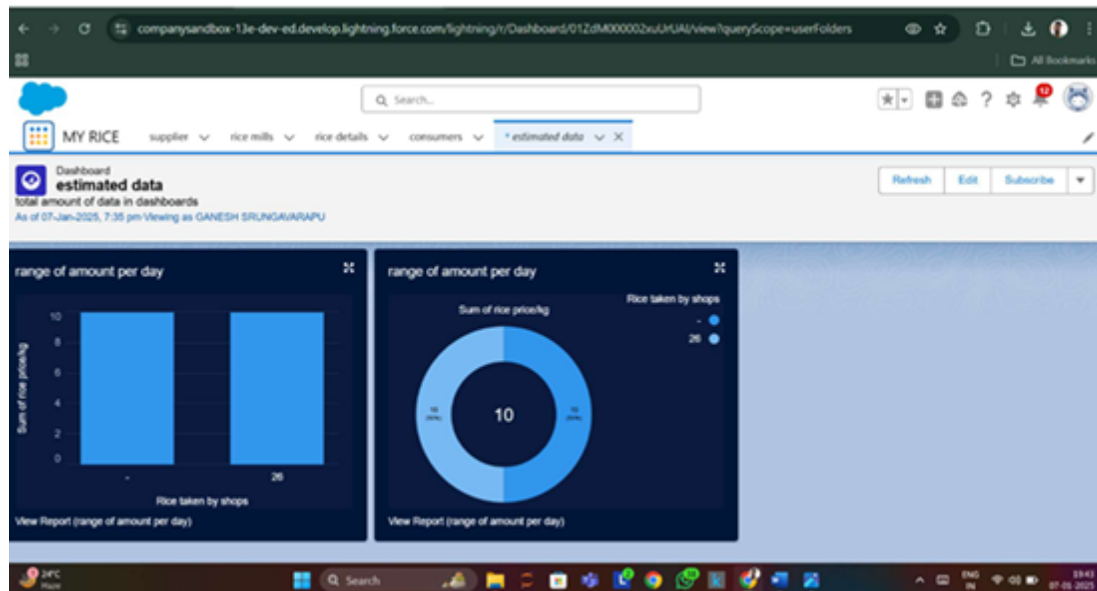
1. Create Dashboard Folder:

1. Navigate to Dashboards in the App Launcher
2. Click New Folder, and name it Amount Data Dashboard.
3. Save the folder.

2. Create Dashboard:

1. Go to the Dashboards tab > New Dashboard.
2. Enter the name: "Rice Mill Summary" and save it in Amount Data Dashboard.
3. Add components:
 - o Select Reports (e.g., "Range of Amount Per Day"
 - o Component 1: Vertical Bar Chart:
 - o X-axis: Rice Taken by Shops.

- Y-axis: Sum of Amount.
- Component 2: Donut Chart:
- Sort by: Sum of Amount Paid



4. Preview and click Save & Done.

APEX

1. Creating an Apex Class (ConsumerRecord):
1. Open Developer Console (Gear icon > Developer Console).
2. Go to File > New > Apex Class.
3. Add the following code:

```
1 class ConsumerRecord {
2     public static void sendEmailNotification (List<consumer__c>
3     con){
4         for(consumer__c c:con)
5             {Messaging.SingleEmailMessage email = new
6             Messaging.SingleEmailMessage();
7             email.setToAddresses( new List<String>{c.email__c});
8             email.setSubject('Welcome to our company');
9             email.setPlainTextBody('Dear ' + ' ' + ',\n\nWelcome to MY
10            RICE!'+'You have been seen as a valuable customer to us. PLEASE
```

```

        continue your journey with us, while we try to provide you with
        good quality resources.'+'\n'+
8
        "We are proud to
        associate with valuable customers like you and we look forward to
        collaborating with you by providing more and more exciting
        discounts or even product offers too.' + '\n'
9
        +'So why taking a step
        back, take a leap of faith and shop with us more, while we provide
        with the valuable products and offers'+'\n'+'\n'+'\n'+
10
        'Thankyou for buying '+
        '' +'Here are some of the products that are brought by the
        customers who similarly bought products like this'+'\n\n');
11
        Messaging.sendEmail(new
        List<Messaging.SingleEmailMessage>{email});
12
13     }
14 }
15 }
16
17

```

4. Save the class.

2. Creating an Apex Trigger:

1. Go to Developer Console > File > New > Trigger.
2. Name the trigger: ConsumerTrigger. Set the object to Consumer__c.
3. Add the following code:

```

1 trigger ConsumerTrigger on Consumer__c (after insert)
2 {
3     if (Trigger.isAfter && Trigger.isInsert) {
4         ConsumerRecord.sendEmailNotification(Trigger.new);
5     }
6 }
7

```

4. Save the trigger. This ensures an email is sent whenever a new Consumer record is created.

5. Testing and Validation Unit Testing:

- Apex classes and triggers were validated to ensure error-free email notifications.
- Roll-up summary and formula fields were tested for accurate calculations.

User Interface Testing:

- Verified functionality of page layouts, ensuring seamless navigation and usability.
- Ensured accurate rendering of reports and dashboards.

End-to-End Testing:

- Simulated daily workflows, including data entry, report generation, and dashboard updates, to validate system reliability.

- Tested role-based access controls to ensure proper data visibility and security.

6. Key Scenarios Addressed by Salesforce in the Implementation Project

1. Daily Reporting:

- Automating the generation of daily production, sales, and revenue reports for the owner.

1. Role-Based Data Access:

- Providing tailored access to data based on user roles (e.g., Owner, Employer, Worker).

1. Enhanced Customer Engagement:

- Sending email notifications to customers with details of their purchases and payments.

1. Data Integrity:

- Ensuring data consistency and reliability through validation rules and error handling.

1. Business Insights:

- Delivering actionable insights through reports and dashboards, enabling data-driven decisions.

7. Conclusion Summary of Achievements:

The Rice Mill CRM Application successfully automated and optimized the rice mill's operational processes.

Key achievements include:

● Operational Efficiency:

- Streamlined workflows and improved resource allocation through automated data management.

Data Visualization:

- Developed dynamic reports and dashboards to provide real-time insights into production, sales, and revenue.

● Enhanced Security:

- Implemented robust role-based access control, ensuring data confidentiality and integrity.

● Improved Customer Communication:

- Automated email notifications and integrated customer engagement tools.

● Scalability:

- Built a scalable and modular solution using Salesforce's flexible framework, ensuring adaptability for future enhancements.

The Rice Mill CRM Application exemplifies the transformative power of Salesforce to meet specific industry needs, driving operational excellence and enabling long-term success for the rice mill.