

A CRM APPLICATION FOR WHOLESALE RICE MILL REPORT

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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 displays the Salesforce Setup interface. At the top, there's a navigation bar with the Salesforce logo, a search bar labeled 'Search Setup', and several utility icons. Below this, the 'Setup' menu is open, showing 'Home' and 'Object Manager'. The 'Object Manager' page is active, displaying 'SETUP > OBJECT MANAGER' and 'supplier'.

The main content area is titled 'Custom Object Definition Edit' and includes buttons for 'Save', 'Save & New', and 'Cancel'. It is divided into two main sections: 'Details' and 'Optional Features'.

Details Section:

- Custom Object Information:** This section contains fields for 'Label' (set to 'supplier'), 'Plural Label' (set to 'suppliers'), and 'Object Name' (set to 'supplier'). It also includes a 'Description' field and a 'Context-Sensitive Help Setting' dropdown (set to 'Open the standard Salesforce.com Help & Training window').
- Enter Record Name Label and Format:** This section includes a text area for the record name label and format.

Optional Features Section:

- ☒ Allow Reports
- ☐ Allow Activities
- ☒ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing

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 'Custom Object Information' section includes fields for 'Label' (rice mill), 'Plural Label' (rice mills), and 'Object Name' (rice_mill). The 'Optional Features' section has checkboxes for 'Allow Reports' (checked), 'Allow Activities' (unchecked), 'Track Field History' (checked), 'Allow in Chatter Groups' (unchecked), and 'Enable Licensing' (unchecked).

Setup Home Object Manager

SETUP Object Manager

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

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

Optional Features

☒ Allow Reports

☐ Allow Activities

☒ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing

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 in Salesforce for the 'consumer' object. The 'Custom Object Information' section includes fields for 'Label' (consumer), 'Plural Label' (consumers), and 'Object Name' (consumer). The 'Optional Features' section has 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 radio buttons for '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-'.

Edit Custom Object consumer Help for this Page

Custom Object Definition Edit Save Save & New Cancel

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](#)

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 th

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?

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

Number 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

The screenshot shows the 'Data Type' selection screen in Salesforce. The 'Master-Detail Relationship' option is selected and highlighted with a red box. Below this, the 'New Relationship' screen is visible, showing 'Step 2. Choose the related object'. A list of objects is displayed, with 'Supplier' selected and highlighted with a red box. The 'Related To' field is also highlighted with a red box. The 'Next' button is indicated with a red arrow.

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

[Have feedback on lookup filters?](#) [Comments](#)

Custom Field Definition Edit

SaveCancel

Field Information

Field Label

rice mill name

Data Type

Master-Detail

Field Name

rice_mill_name

Description

Help Text

Data Owner

User

Field Usage

--None--

Data Sensitivity Level

None

Master-Detail Options

Related To

rice.mill

Child Relationship Name

consumers

Related List Label

consumers

Sharing Setting

Select the minimum access level required on the Master record to create, edit, or delete related Detail records:

☐ Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

☒ Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting

☐ Child records can be reparented to other parent records after they are created

Lookup Filter

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

SaveCancel

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	supplier
Summarized Object	rice details
Select Roll-Up Type	
<input type="radio"/> COUNT <input checked="" type="radio"/> SUM <input type="radio"/> MIN <input type="radio"/> MAX	Field to Aggregate: rice distributed ▼
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	
<input type="button" value="Save"/> <input type="button" value="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](#)

Custom Field Definition Edit	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	
Field Information	
Field Label	supplier Name
Field Name	supplier
Description	
Help Text	
Data Owner	User
Field Usage	--None--
Data Sensitivity Level	--None--
Compliance Categorization	
Master-Detail Options	
Related To	supplier
Child Relationship Name	rice_details
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' page in Salesforce. 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`. The 'Advanced Formula' tab is also visible. To the right, there is a 'Functions' panel with a list of functions including ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. The 'Insert Operator' dropdown is set to '*'. The 'Insert Field' button is visible on the left. The 'Check Syntax' button is also present. The 'Example' text at the bottom left reads: 'Example: Fahrenheit = 1.8 * Celsius__c + 32 | More Examples...'. The 'Security Center' and 'Operators & Functions' links are visible on the right side of the page.

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."

Validation Rule Edit
Save Save & New Cancel

Rule Name

Active ☒

Description

Error Condition Formula

Example: [More Examples...](#)

Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

Insert Field
Insert Operator

OR(ISBLANK(Phone_number_c) , ISBLANK(email_c))

Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

ABS(number)
Returns the absolute value of a number, a number without its sign

[Help on this function](#)

Check Syntax

Error Message

Example:

This message will appear when Error Condition formula is **true**

Error Message

This error message can either appear at the top of the page or below a specific field on the page

Error Location ☒ Top of Page ☐ Field [?](#)

Save Save & New Cancel

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.

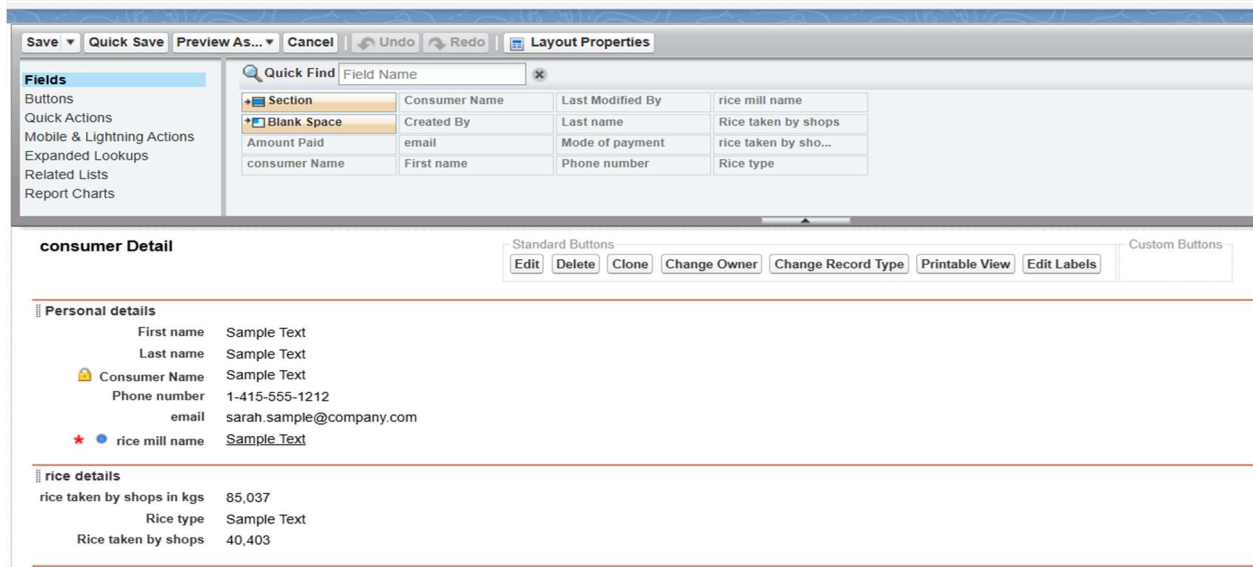
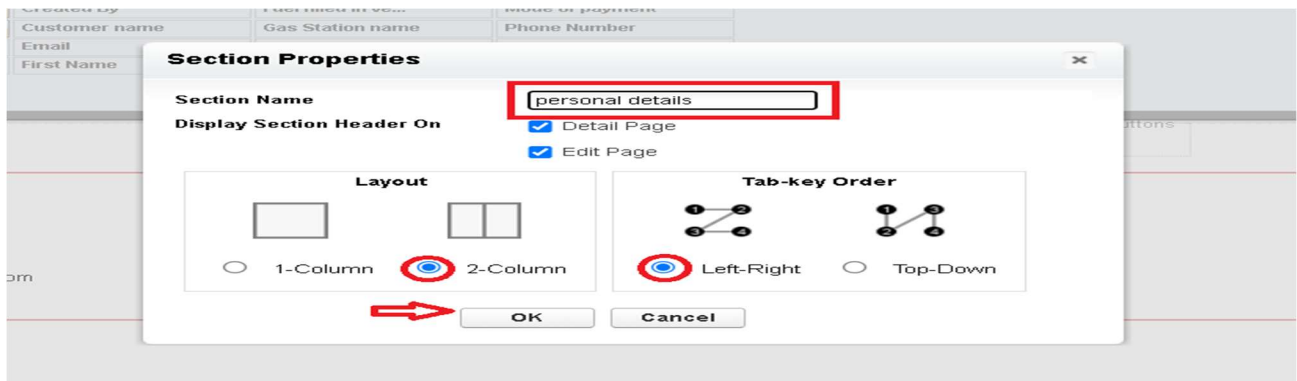
Create New Page Layout

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

Page Layout Name

Save Cancel



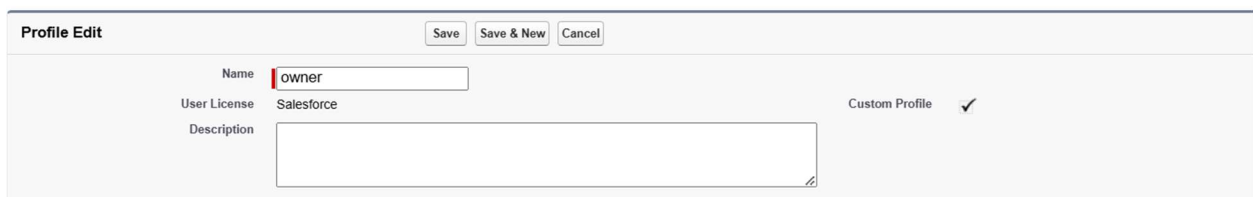
Profiles:

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.



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"/>	

	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All	Modify All	
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:

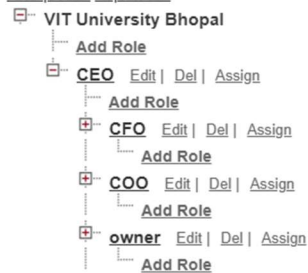
- Go to Setup > Roles > Set Up Roles.
- Click on Add Role under CEO and Give Label as "owner" and Role name gets auto populated.
- Role Label: Owner; Save the role.

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](#)



Creating Employer Roles:

- Add a new role under Owner:
- Role Label: Employer; Save the 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	Bidi Bazz Arshad	Diddy	arshad@techcure.com	owner	✓	owner
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty00ddm00000g9tetua3.r1x3gwahngs@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	SMeer	@vitbhopal.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@00ddm00000g9tetua3.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00ddm00000g9tetua3.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

Help for this Page

User Edit | 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).

User Edit
Tofik Sheik

User Edit | 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

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.

Edit Subscription

Settings

Frequency

Daily Weekly Monthly

Time

8:00 am

Attachment

Attach File

Recipients

Send email to

Me

Edit Recipients

Run Report As

☐ Me

☒ Another Person

Cancel Save

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:
 - o Select the report dropdown.
 - o Choose **Move** > Select folder: Estimated Rice Per Day > Save.

MY RICE

supplier ▾rice mills ▾rice details ▾consumers ▾

* Recent | Dashboards ▾×

DashboardsRecent

1 item

Search recent dashboards...

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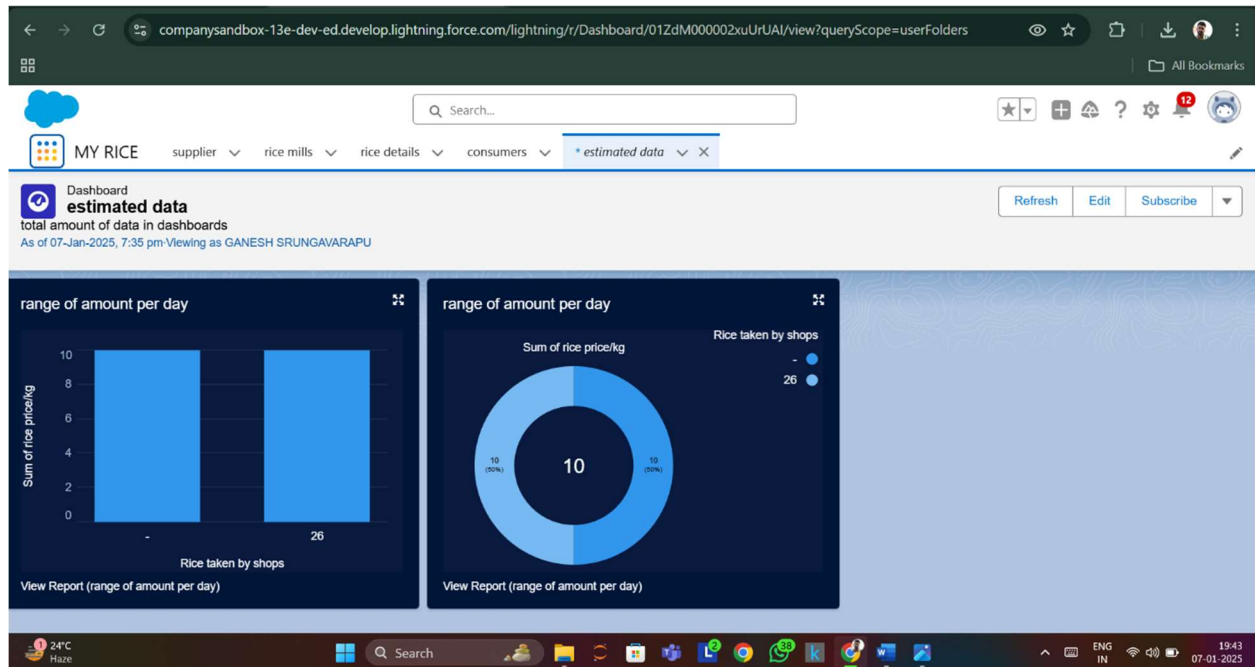
FAVORITESFavorites

-

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

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:

- Select **Reports** (e.g., “Range of Amount Per Day”).
- Component 1: **Vertical Bar Chart**:
- 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.