

Project Title: A CRM Application for Wholesale Rice Mill

1. Project Overview

This project focuses on developing a Salesforce-based CRM application tailored for wholesale rice mills. The primary objective is to streamline business operations, improve customer relationship management, and optimize sales processes. By leveraging Salesforce's capabilities, we aim to enhance operational efficiency, provide a seamless user experience, and ensure accurate data management. This project supports the long-term goals of increasing market reach, improving customer satisfaction, and enabling data-driven decision-making for wholesale rice mills.

2. Objectives

Business Goals:

- Streamline the sales and order management processes.
- Enhance customer relationship management by providing detailed insights into customer interactions.
- Improve inventory tracking and order fulfillment efficiency.
- Facilitate seamless communication between sales teams and clients.
- Increase overall operational transparency and efficiency.

Specific Outcomes:

- Develop a centralized database for managing customer information, orders, and inventory.
- Create custom Salesforce workflows to automate routine tasks.
- Implement dashboards and reports for real-time analytics.
- Enable mobile access for on-the-go CRM functionalities.

3. Salesforce Key Features and Concepts Utilized

- **Sales Cloud:** To manage leads, opportunities, and sales pipelines.

- **Custom Objects:** For managing rice inventory, orders, and supplier details.
- **Objects:**

The screenshot shows the Salesforce Object Manager interface. The 'Object Manager' dropdown menu is open, displaying a list of recent records. The main table lists various standard objects with columns for Label, Type, Description, Last Modified, and Deployed.

Label	Type	Description	Last Modified	Deployed
Account	Standard Object			
Activity	Standard Object			
Address	Standard Object	Address		
Alternative Payment Method	Standard Object	AlternativePaymentMethod		
API Anomaly Event Store	Standard Object	ApiAnomalyEventStore		
Appointment Category	Standard Object	AppointmentCategory		
Appointment Invitation	Standard Object	AppointmentInvitation		
Appointment Invitee	Standard Object	AppointmentInvitee		
Appointment Topic Time Slot	Standard Object	AppointmentTopicTimeSlot		
Asset	Standard Object	Asset		
Asset Action	Standard Object	AssetAction		
Asset Action Source	Standard Object	AssetActionSource		
Asset Relationship	Standard Object	AssetRelationship		
Asset State Period	Standard Object	AssetStatePeriod		
Assigned Resource	Standard Object	AssignedResource		

Tabs:

The screenshot shows the Salesforce Tabs interface. The 'Custom Tabs' section is active, displaying a list of custom object tabs. The tabs listed are 'consumers', 'rice details', 'rice mills', and 'supplier'.

Action	Label	Tab Style	Description
Edit Del	consumers	Hands	
Edit Del	rice details	Factory	
Edit Del	rice mills	Radar dish	
Edit Del	supplier	Helicopter	

Create a Lightning App:

The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar contains a navigation menu with categories like Sales, Data, Apps, and Mobile. The main content area displays a table of 24 Lightning apps, sorted by App Name. The table includes columns for App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. The 'MY RICE' app is highlighted.

App Name	Developer Name	Description	Last Modified Date	App ...	Visi...
9 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	26/01/2025, 1:13 am	Lightning	✓
10 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	26/01/2025, 1:13 am	Lightning	✓
11 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	26/01/2025, 1:13 am	Lightning	✓
12 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	26/01/2025, 1:13 am	Classic	✓
13 MY RICE	MY_RICE		26/01/2025, 10:48 am	Lightning	✓
14 Platform	Platform	The fundamental Lightning Platform	26/01/2025, 1:13 am	Classic	
15 Queue Management	QueueManagement	Create and manage queues for your business.	26/01/2025, 1:13 am	Lightning	✓
16 Sales	Sales	The world's most popular sales force automation (SFA) solution	26/01/2025, 1:13 am	Classic	
17 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	26/01/2025, 1:13 am	Lightning	✓
18 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	26/01/2025, 1:13 am	Lightning	✓
19 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	26/01/2025, 1:13 am	Classic	✓
20 Salesforce Scheduler S...	LightningScheduler	Set up personalized appointment scheduling.	26/01/2025, 1:17 am	Lightning	✓
21 Service	Service	Manage customer service with accounts, contacts, cases, and more	26/01/2025, 1:13 am	Classic	✓
22 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across custo...	26/01/2025, 1:13 am	Lightning	✓
23 Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com applicatio...	26/01/2025, 1:13 am	Classic	
24 Subscription Manage...	RevenueCloudConsole	Get started automating your revenue processes	26/01/2025, 1:13 am	Lightning	✓

Fields:

The screenshot shows the Salesforce Lightning Experience Fields & Relationships interface. The left sidebar contains a navigation menu with categories like Details, Fields & Relationships, Page Layouts, and Object Limits. The main content area displays a table of 14 fields for the 'consumer' object, sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid__c	Formula (Number)		
consumer	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(30)		
Last Modified By	LastModifiedById	Lookup(User)		
Last name	Last_name__c	Text(30)		
Mode of payment	Mode_of_payment__c	Picklist (Multi-Select)		
Phone number	Phone_number__c	Phone		
rice mill name	rice_mill__c	Master-Datall/ice_mill		

Page Layouts:

The screenshot shows the Salesforce Setup interface for configuring the 'consumer' object layout. The left sidebar lists navigation options: Details, Fields & Relationships, Page Layouts (selected), 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, Scoping Rules, and Object Access.

The main content area displays the 'consumer' object layout configuration. At the top, there's a 'Layout Properties' window showing a table of fields and their properties:

Section	Field Name	Consumer Name	Last Modified By	rice mill name
Blank Space	Created By	Last name	Rice	Label: rice mill name
Amount Paid	email	Mode of payment	rice	Name: rice_mill
consumer	First name	Phone number	Rice	Type: Lookup

Below the table, there's a section for 'Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.'

The 'consumer Detail' layout is shown with standard buttons: Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, and Edit Labels. Custom buttons are also listed.

The layout is divided into sections:

- 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), and a lookup field for 'rice mill name' (Sample Text).
- rice details**: Rice taken by shops (14,119), Rice type (Sample Text).
- Receipt details**: Mode of payment (Sample Text), Amount Paid (313.33).

Profiles:

Owner profile

The screenshot shows the Salesforce Setup interface for the 'owner' profile. The left sidebar lists navigation options: Hyperforce Assistant, Users, Profiles (selected), Data, Mass Transfer Approval Requests, Feature Settings, Data.com, Prospector Preferences, Prospector Users, Decision Explorer, Business Process Type Definition, Functions, Marketing, Lead Processes, Sales, Products, Asset Settings, and Product Schedules Settings.

The main content area displays the 'owner' profile configuration. At the top, there's a 'Profile Detail' section with buttons: Edit, Clone, Delete, and View Users. The profile is named 'owner' and is a 'Custom Profile'.

The 'Page Layouts' section shows the standard object layouts assigned to the profile:

Standard Object Layouts	Global	Global Layout	Fulfillment Order Item Tax	Fulfillment Order Item Tax Layout
Email Application	Not Assigned	[View Assignment]	Fulfillment Order Product	Fulfillment Order Product Layout
Home Page Layout	Home Page Default	[View Assignment]	Idea	Varies by Record Type
Account	Account Layout	[View Assignment]	Individual	Individual Layout
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]	Invoice	Invoice Layout
Appointment Invitation	Appointment Invitation Layout	[View Assignment]	Invoice Line	Invoice Line Layout
Asset	Asset Layout	[View Assignment]	Lead	Lead Layout

Employer profile:

The screenshot displays the Salesforce Setup interface for the 'employer' profile. The left sidebar shows the navigation menu with 'Profiles' selected under 'Users'. The main content area shows the profile details for 'employer'.

Profile Details:

- Name: employer
- User License: Salesforce Platform
- Description: Not Assigned
- Created By: Gireesh Immidisetty, 26/01/2025, 2:28 pm
- Modified By: Gireesh Immidisetty, 26/01/2025, 2:28 pm
- Custom Profile: ☒

Page Layouts:

Standard Object Layouts	Global	Global Layout [View Assignment]	Fulfillment Order Item Tax	Fulfillment Order Item Tax Layout [View Assignment]
Email Application	Not Assigned [View Assignment]		Fulfillment Order Product	Fulfillment Order Product Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]		Idea	Varies by Record Type [View Assignment]
Account	Account Layout [View Assignment]		Individual	Individual Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]		Invoice	Invoice Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]		Invoice Line	Invoice Line Layout [View Assignment]
Asset	Asset Layout [View Assignment]		Lead	Lead Layout [View Assignment]

worker profile:

The screenshot displays the Salesforce Setup interface for the 'worker' profile. The left sidebar shows the navigation menu with 'Profiles' selected under 'Users'. The main content area shows the profile details for 'worker'.

Profile Details:

- Name: worker
- User License: Salesforce Platform
- Description: Not Assigned
- Created By: Gireesh Immidisetty, 26/01/2025, 2:29 pm
- Modified By: Gireesh Immidisetty, 26/01/2025, 2:29 pm
- Custom Profile: ☒

Page Layouts:

Standard Object Layouts	Global	Global Layout [View Assignment]	Fulfillment Order Item Tax	Fulfillment Order Item Tax Layout [View Assignment]
Email Application	Not Assigned [View Assignment]		Fulfillment Order Product	Fulfillment Order Product Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]		Idea	Varies by Record Type [View Assignment]
Account	Account Layout [View Assignment]		Individual	Individual Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]		Invoice	Invoice Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]		Invoice Line	Invoice Line Layout [View Assignment]
Asset	Asset Layout [View Assignment]		Lead	Lead Layout [View Assignment]

Roles:

role

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.

Search Setup

Setup Home Object Manager

Search Setup

Roles

Collapse All Expand All

NA

Add Role

CEO Edit Del Assign

Add Role

CFO Edit Del Assign

Add Role

CDO Edit Del Assign

Add Role

owner Edit Del Assign

Add Role

employer Edit Del Assign

Add Role

worker Edit Del Assign

Add Role

SVP, Customer Service & Support Edit Del Assign

Add Role

Customer Support, International Edit Del Assign

Add Role

Customer Support, North America Edit Del Assign

Add Role

Installation & Repair Services Edit Del Assign

Add Role

SVP, Human Resources Edit Del Assign

Add Role

SVP, Sales & Marketing Edit Del Assign

Add Role

VP, International Sales Edit Del Assign

Add Role

VP, Marketing Edit Del Assign

Users:

use

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App
and Web User
Verification

Process Automation

Paused And Failed Flow
Interviews

Tiger Interface

Search Setup

Setup Home Object Manager

Search Setup

Users

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty00dns00000c13ef2aj.jpno7auojvks@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	immidsetty, Giresh	Gimmi	riceiml@123.com		✓	System Administrator
<input type="checkbox"/> Edit	ram, ram	ram	ram@1111.com	employer	✓	Standard Platform User
<input type="checkbox"/> Edit	User, Integration	integ	integration@00dns00000c13ef2aj.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User, Security	sec	insightssecurity@00dns00000c13ef2aj.com		✓	Analytics Cloud Security User
<input type="checkbox"/> Edit	y, vicky	yy	giresht09022004@gmail.com	owner	✓	owner

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

sharing settings:

Setup

Home

Object Manager

Q shar

Security

Guest User Sharing Rule Access Report

Sharing Settings

Didn't find what you're looking for?

Try using Global Search.

Sharing Settings

Service Territory	Public Read/Write	Private	✓
Shift	Private	Private	✓
Shipment	Private	Private	✓
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	✓
User Provisioning Request	Private	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	✓
consumer	Controlled by Parent	Controlled by Parent	
rice details	Controlled by Parent	Controlled by Parent	
rice mill	Public Read Only	Private	✓
supplier	Public Read Only	Private	✓

Other Settings

Reports:

MY RICE

supplier

rice details

rice mills

consumers

Reports

Q Search...

Star

+

?

12

Reports

Recent

1 item

Q Search recent reports...

New Report

New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	range of amount per day		estimated rice per day	Giresh immidisetty	26/1/2025, 2:42 pm	✓

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS


All Folders


Created by Me

Shared with Me

FAVORITES

All Favorites



★
+
🏠
?
⚙️
12


MY RICE

supplier
rice details
rice mills
consumers
Reports


Reports


All Folders

8 items

[New Report](#)
[New Folder](#)
⚙️

	Name	Created By	Created On	Last Modified By	Last Modified Date	
REPORTS						
Recent	Einstein Bot Reports	Automated Process	26/1/2025, 1:13 am	Automated Process	26/1/2025, 1:13 am	⌵
Created by Me	Einstein Bot Reports Spring '23	Automated Process	26/1/2025, 1:13 am	Automated Process	26/1/2025, 1:13 am	⌵
Private Reports	Einstein Bot Reports Summer '23	Automated Process	26/1/2025, 1:13 am	Automated Process	26/1/2025, 1:13 am	⌵
Public Reports	Einstein Bot Reports Summer '22	Automated Process	26/1/2025, 1:13 am	Automated Process	26/1/2025, 1:13 am	⌵
	Einstein Bot Reports Winter '23	Automated Process	26/1/2025, 1:13 am	Automated Process	26/1/2025, 1:13 am	⌵
All Reports	Enablement Dashboard Reports Spring '24	Automated Process	26/1/2025, 1:13 am	Automated Process	26/1/2025, 1:13 am	⌵
FOLDERS						
All Folders	Enablement Dashboard Reports Summer '24	Automated Process	26/1/2025, 1:13 am	Automated Process	26/1/2025, 1:13 am	⌵
Created by Me	estimated rice per day	Giresh immidisetty	26/1/2025, 2:46 pm	Giresh immidisetty	26/1/2025, 2:46 pm	⌵
Shared with Me						
FAVORITES						
All Favorites						



★
+
🏠
?
⚙️
12


MY RICE

supplier
rice details
rice mills
consumers
range of amount per day

Report: rice mills with consumers

range of amount per day

[Enable Field Editing](#)

[Add Chart](#)
⌵
↺
Edit
⌵

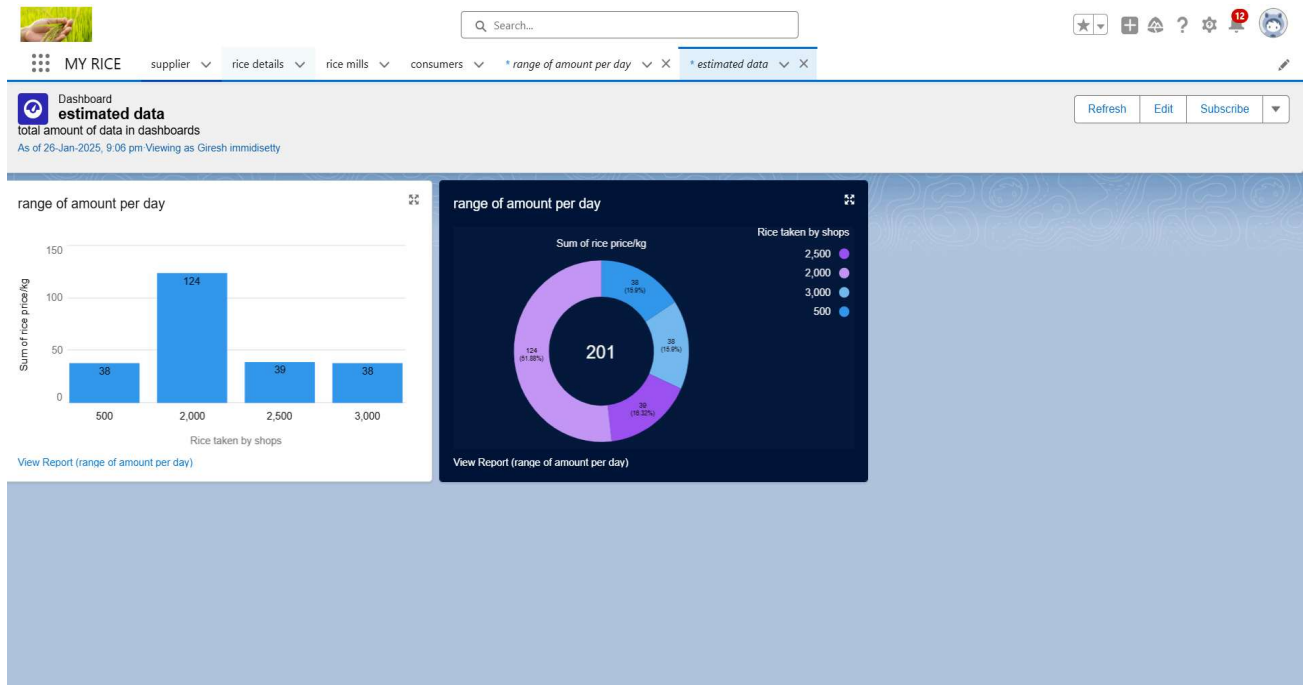
Total Records		Total rice price/kg		Total Amount Paid		
6		201		4,78,500.00		
<input type="checkbox"/> Rice taken by shops	rice mill: rice mill	consumer: consumer	rice price/kg	Rice type	Mode of payment	Amount Paid
<input type="checkbox"/> 500 (1)	rice-004	consumers-006	38	basmati	Credit card	19,000.00
Subtotal			38			19,000.00
<input type="checkbox"/> 2,000 (3)	rice-001	consumers-001	42	normal rice	Credit card	84,000.00
	rice-002	consumers-002	43	normal rice	Credit card	86,000.00
	rice-003	consumers-003	39	basmati	Credit card	78,000.00
Subtotal			124			2,48,000.00
<input type="checkbox"/> 2,500 (1)	rice-005	consumers-005	39	normal rice	Credit card	97,500.00
Subtotal			39			97,500.00
<input type="checkbox"/> 3,000 (1)	rice-004	consumers-004	38	basmati	Credit card	1,14,000.00
Subtotal			38			1,14,000.00
Total (6)			201			4,78,500.00

Row Counts
Detail Rows
Subtotals
Grand Total

Workflow Rules and Process Builder: To automate tasks such as order confirmations and follow-ups.

- **Reports and Dashboards:** For monitoring sales performance, inventory levels, and customer interactions.
- **Apex and Visualforce:** For implementing custom business logic and UI enhancements.
- **Lightning Components:** For an enhanced and responsive user interface.

Dashboards:



Apex:

```

1 public class ConsumerRecord {
2     public static void sendEmailNotification (List<consumer__c> con){
3         for(consumer__c c:con)
4         {
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('Dear ' + ' ' + ',\n\nWelcome to MY RICE!' + 'You have been seen as a valuable customer to us. Please continue y
9             'We are proud to associate with valuable customers like you and we look forward to collaborating with you
10            'So why taking a step back, take a leap of faith and shop with us more, while we provide with the valuabl
11            'Thankyou for buying ' + ' ' + 'Here are some of the products that are brought by the customers who similarly
12            Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
13        }
14    }
15 }
16 }

```

```

1 trigger consumerTrigger on consumer__c (After insert) {
2     if(trigger.isAfter && trigger.isInsert) {
3         ConsumerRecord.sendEmailNotification(trigger.new);
4     }
5 }

```

4. Detailed Steps to Solution Design

1. Requirement Gathering:

- Understand the key pain points and requirements of the wholesale rice mill business.
- Document the needs related to customer management, order tracking, and sales processes.

2. Data Model Design:

- Create custom objects such as Customer, Order, RiceInventory, and Supplier.
- Define relationships between objects (e.g., Customers and Orders, Inventory and Orders).

3. UI Design:

- Develop user-friendly Lightning pages for key entities.
- Implement search functionality for quick access to records.

4. Business Logic Implementation:

- Use Apex classes and triggers for custom business rules, such as inventory deduction upon order fulfillment.
- Configure validation rules to ensure data accuracy.

5. Automation:

- Create workflows for sending automated emails for order confirmations and delivery updates.
- Use Process Builder for follow-up reminders based on order status.

6. Reports and Dashboards:

- Build dashboards showing sales trends, top customers, and inventory status.
- Configure real-time reports for quick insights.

5. Testing and Validation

● Unit Testing:

- Test Apex classes and triggers to ensure accuracy in business logic implementation.

● User Interface Testing:

- Validate the usability and responsiveness of Lightning pages across devices.

● Integration Testing:

- Verify data flows between different Salesforce components and third-party systems (if any).

● User Acceptance Testing (UAT):

- Engage end-users to test the application against real-world scenarios.

6. Key Scenarios Addressed by Salesforce in the Implementation Project

- Efficient tracking of bulk orders and their statuses.
- Maintaining accurate inventory levels with automated updates.
- Generating detailed sales and customer interaction reports.
- Automating repetitive tasks, such as follow-ups and confirmation emails.
- Enabling mobile access for field sales teams.
- Providing a 360-degree view of customer information to improve service quality.

7. Conclusion

Summary of Achievements:

- Successfully implemented a customized CRM solution for wholesale rice mills using Salesforce.
- Streamlined sales and order management processes.
- Enhanced customer relationship management through automation and detailed insights.
- Improved inventory tracking and operational efficiency.
- Delivered a scalable and user-friendly system aligned with the business's long-term goals.

This project demonstrates the potential of Salesforce as a transformative tool for the wholesale rice mill industry, setting a strong foundation for future growth and innovation.