

# A CRM APPLICATION FOR WHOLESALE RICE MILL

By

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## Project Abstract

The CRM application for a rice mill, developed using Salesforce, is designed to streamline and enhance the management of customer relationships, operations, and sales processes within the rice milling industry. This solution leverages Salesforce's robust CRM capabilities to provide a comprehensive platform for managing customer interactions, tracking sales performance, and optimizing supply chain operations. Key features include automated customer data management, real-time sales tracking, and integrated reporting tools that offer insights into market trends and operational efficiency. The application aims to improve customer satisfaction, increase sales effectiveness, and drive operational excellence by providing a unified system that aligns sales, marketing, and service functions within the rice milling business.

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## Topics

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- Role and Hierarchy
- Users
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# A CRM APPLICATION FOR WHOLESALE RICE MILL

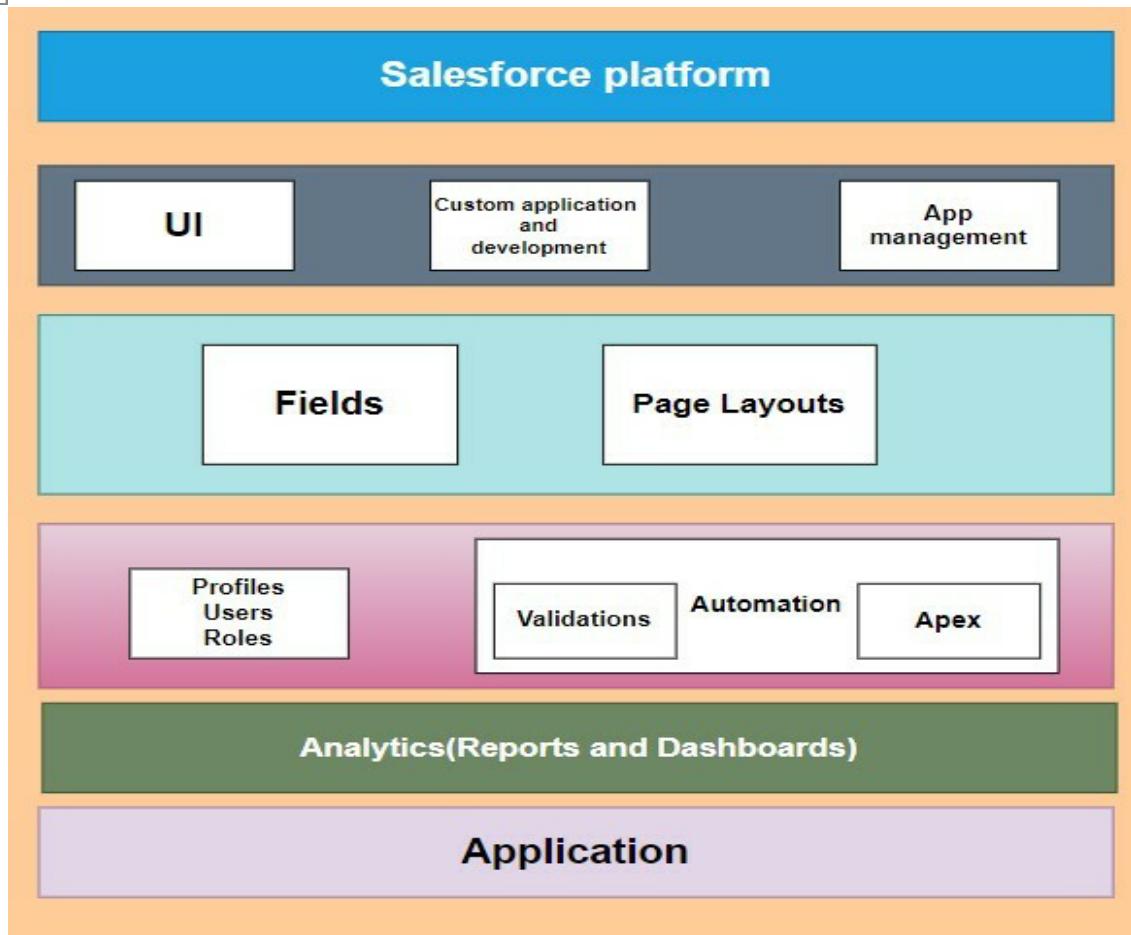
## Short Description:

The Rice Mill Crm Streamlines Daily Rice Production and Sales Reporting,Enhancing Efficiency and Customer Experiences.

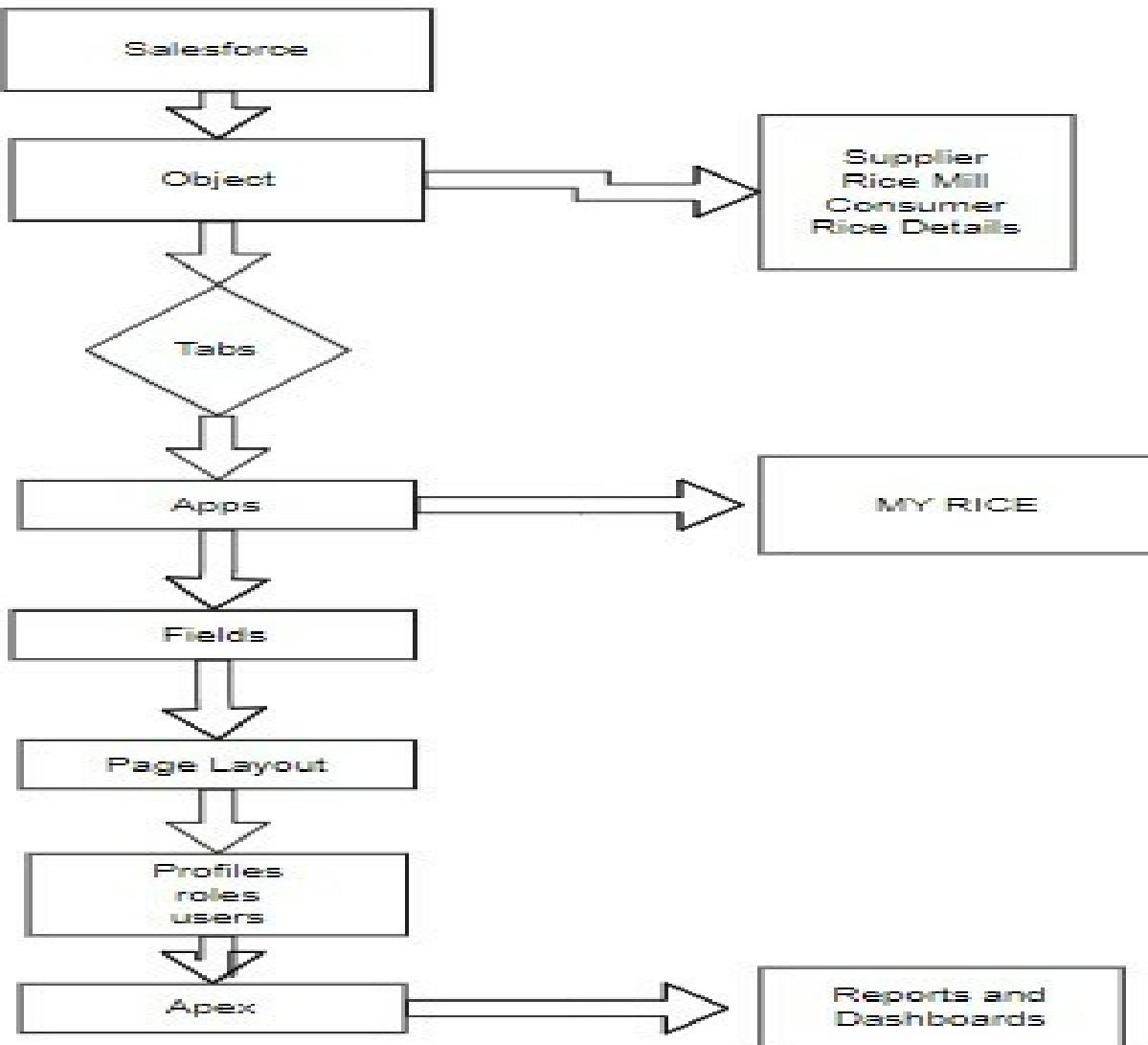
## Long Description:

The Rice Mill CRM Application is a comprehensive solution designed to streamline and simplify how much rice per day, how many were sold that rice and which type of rice all reports send to owners daily wise. It leverages the power of customer relationship management (CRM) to enhance customer experiences, optimize store operations, and improve overall efficiency in the rice mill factory. This project aims to develop a userfriendly and feature-rich application that addresses the specific needs of a rice mill factory.

## Technical Architecture:



Project Flow:



### Features and Functionality:

**Reports and Dashboards:** The application can generate detailed reports and analytics regarding daily how much rice sold and total income per daily, revenue generated, popular amenities, and most bought customers. Easy to understand the data to the owner, improving resource allocation, and planning future development.

**Roll Up Summary Field:** This is a field that summarizes data from a child object to a parent object that shares a master-detail relationship. Rollup summary fields can use the COUNT, SUM, MIN, and MAX functions. For example, you could use a rollup summary field to display the total value (amount of rice supplied) from rice details on a related supplier.

**Cross Object Formula:** It is a formula field that references fields from another object in Salesforce. This type of formula allows users to calculate the total amount from number of rice taken\*price/kg and it displays the total amount I have to pay.

**Validation Rule:** Validation rules also include an error message to display to the user when the rule returns a value of “True” due to an invalid value. In this project I gave Isblank formula. Isblank formula is used to verify whether it is blank it shows error.

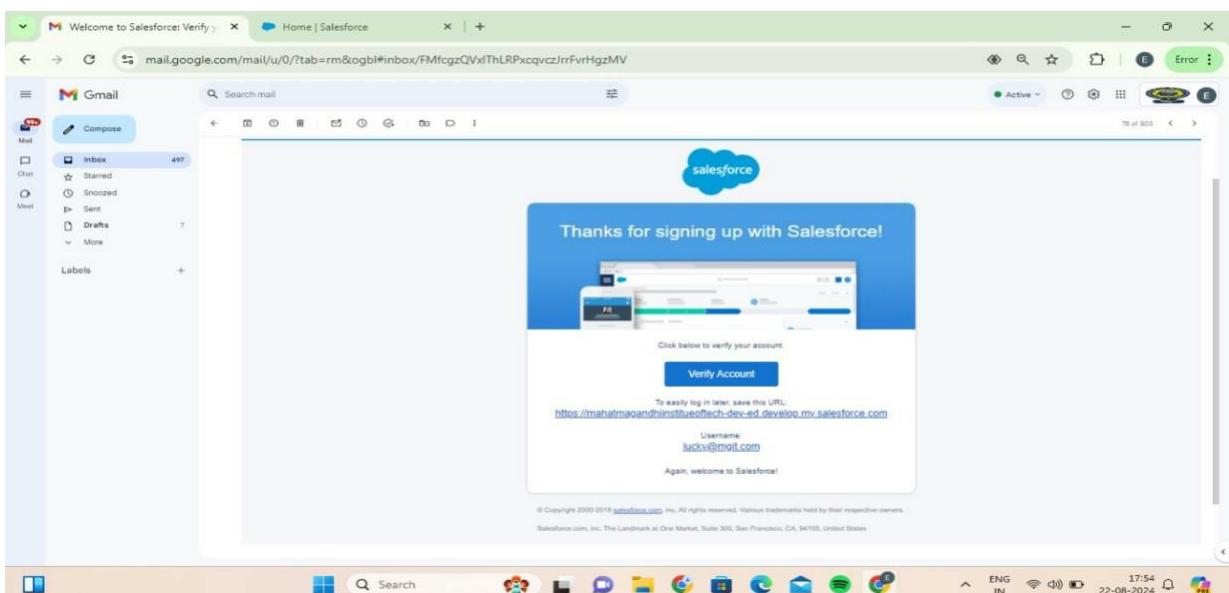
**Permission sets:** Organization Wide Defaults(OWD) in salesforce is the baseline level of access that the most restricted user should have. Organizational Wide Defaults are used to restrict access. But in our case we created roles and given the roles in such a way that the owner can see employer and worker records , and the employer can see the worker records.

### Milestone 1 - Introduction to Salesforce:

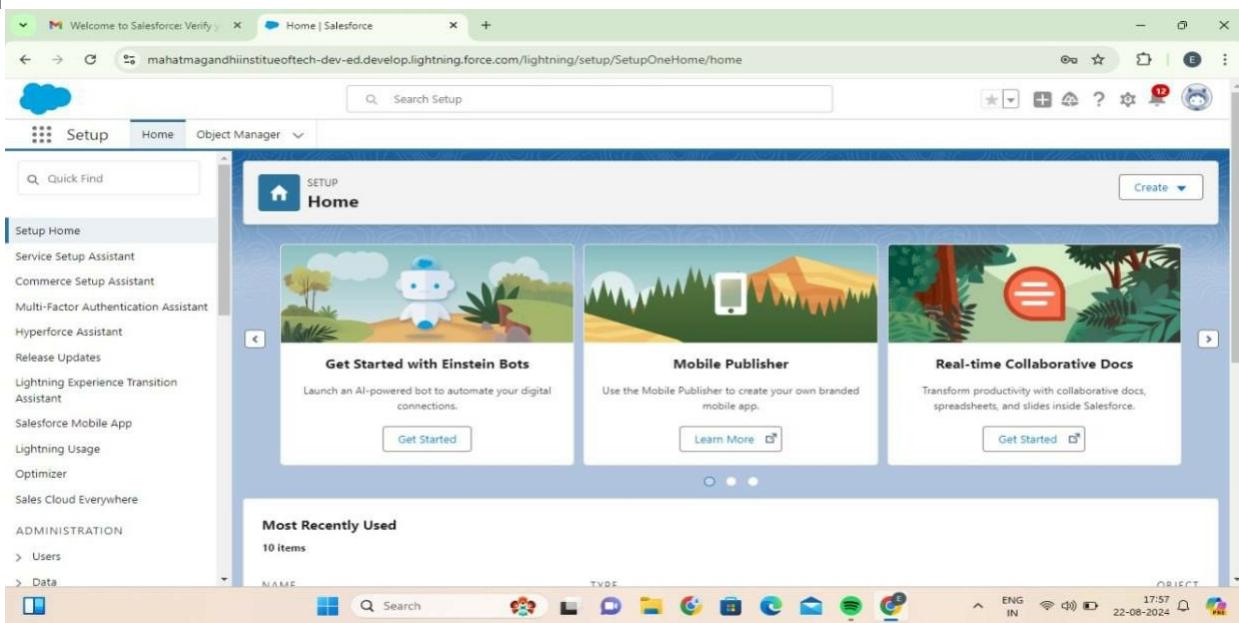
#### What is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

#### Activity 1: Creating Developer Account:



#### Activity 2: Account Activation:



## Milestone 2 - Object:

### What Is an Object?

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects? Salesforce objects are of two types:

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

## Activity 1: Create Supplier Object:

The screenshot shows the Salesforce Object Manager interface for the 'supplier' object. The left sidebar lists various configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main 'Details' tab is selected, showing the following configuration details:

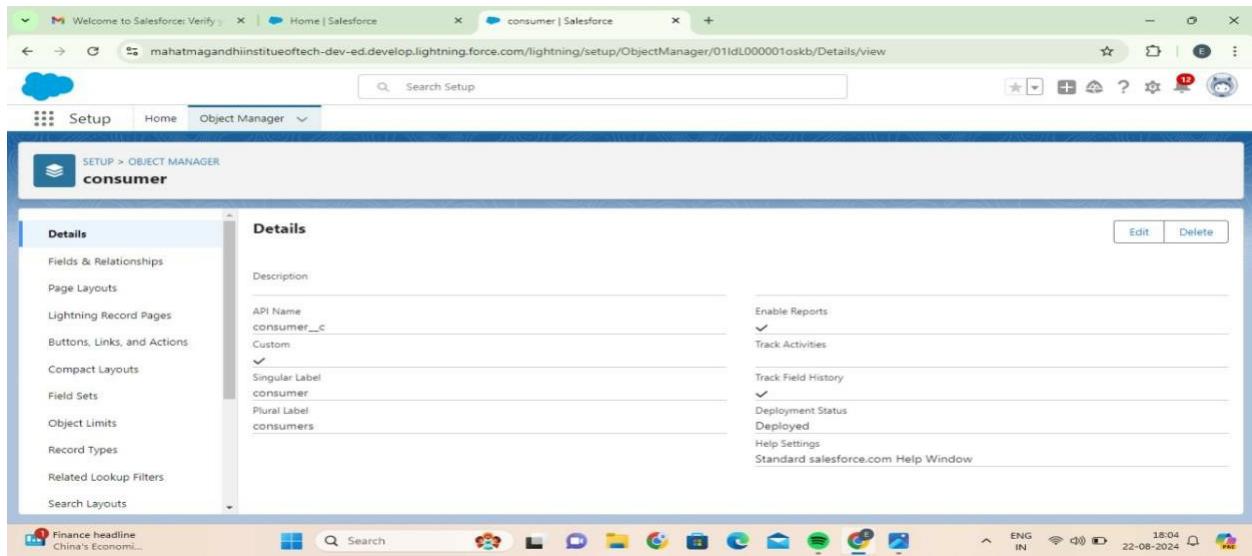
Setting	Value
Description	
API Name	supplier_c
Custom	✓
Singular Label	supplier
Plural Label	supplier
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

## Activity 2: Create Rice mill Object:

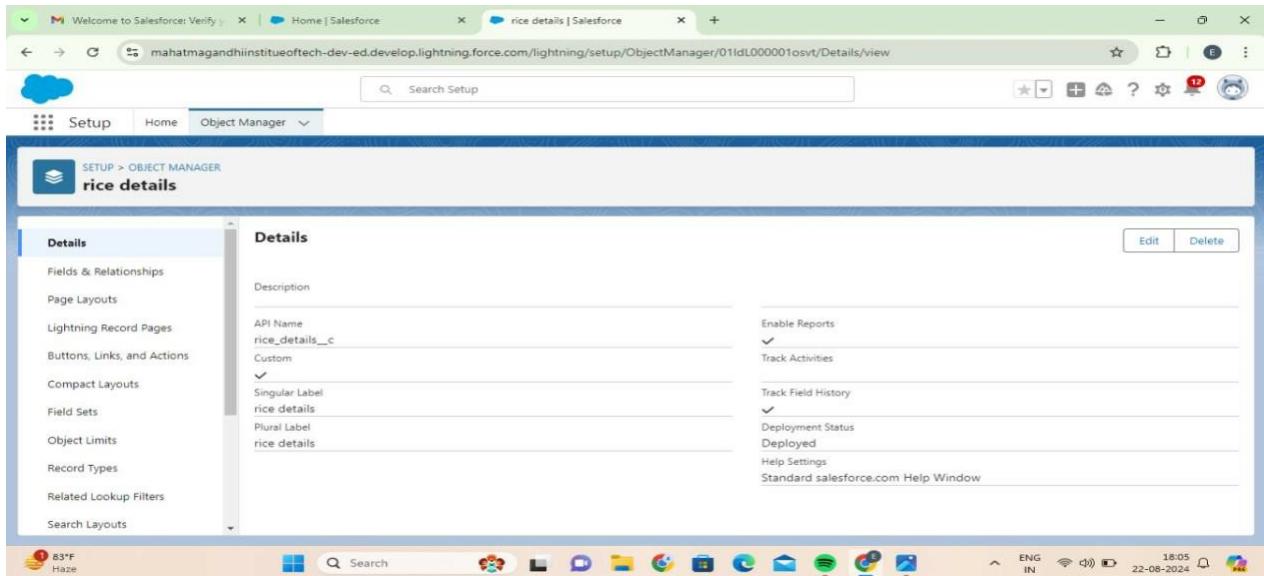
The screenshot shows the Salesforce Object Manager interface for the 'rice mill' object. The left sidebar lists various configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main 'Details' tab is selected, showing the following configuration details:

Setting	Value
Description	
API Name	rice_mill_c
Custom	✓
Singular Label	rice mill
Plural Label	rice mills
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

### Activity 3: Create consumer Objects:



### Activity 4: Create rice details Objects:



### Milestone 3 - Tabs:

What is Tab?

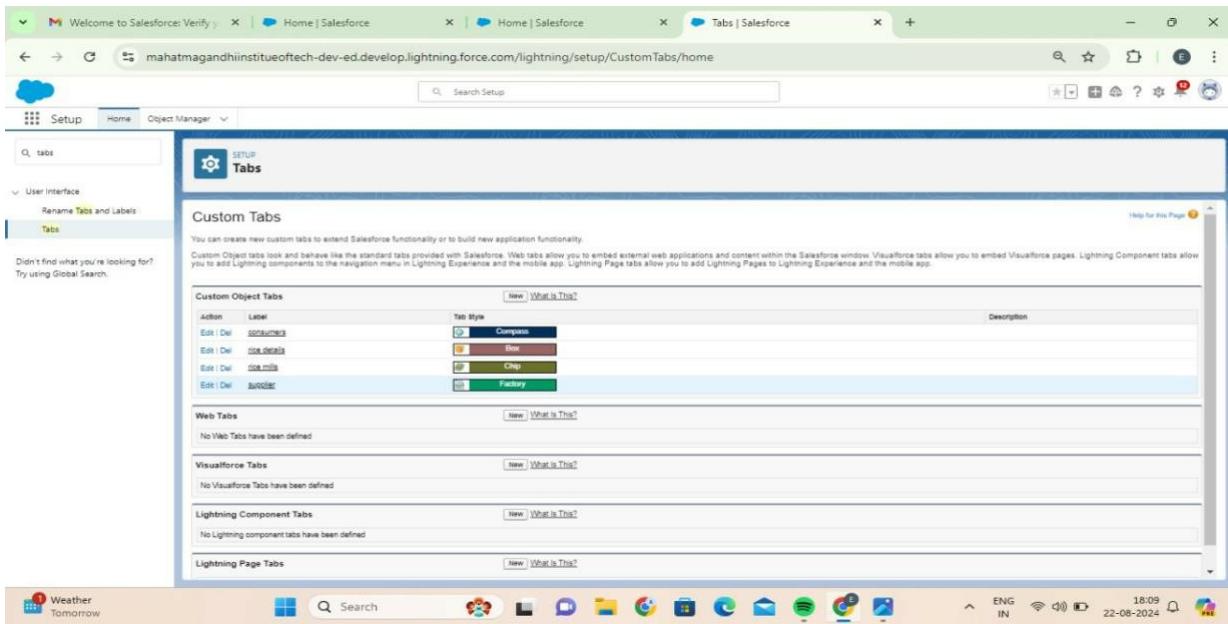
A tab is like a user interface that is used to build records for objects and to view the records in the objects.

### Types of Tabs:

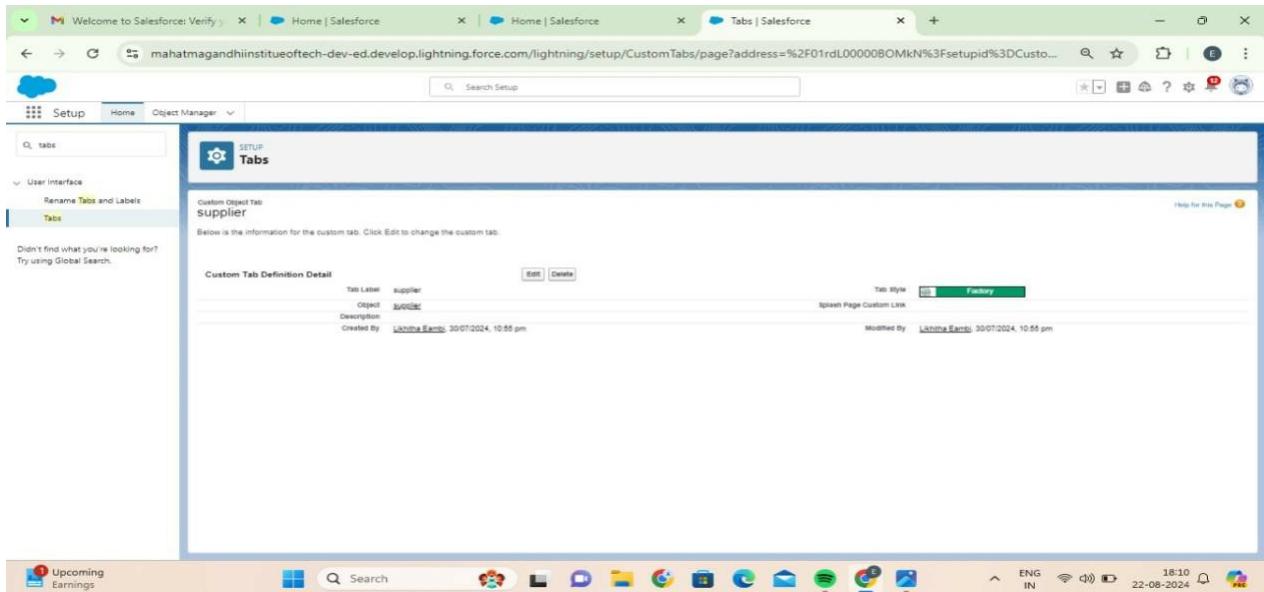
1. **Custom Tabs:** Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

2. **Web Tabs:** Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.
3. **Visualforce Tabs:** Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.
4. **Lightning Component Tabs:** Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.
5. **Lightning Page Tabs:** Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu. Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

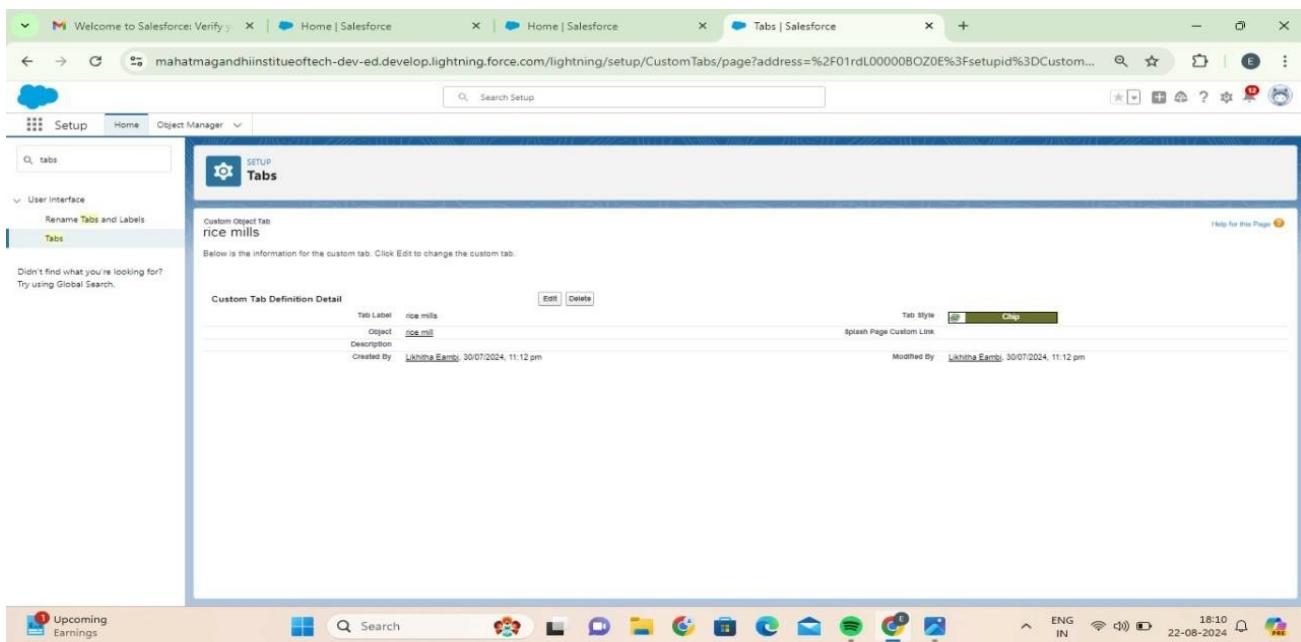
### Activity 1: Creating a Custom Tab:



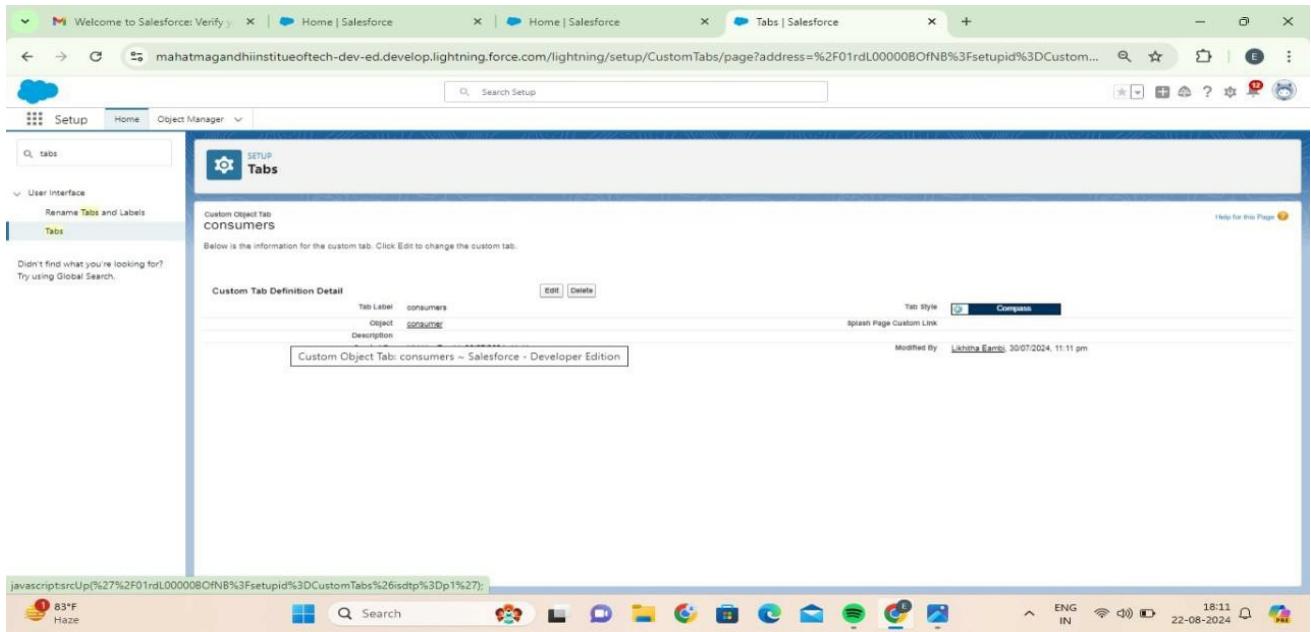
supplier Tab:



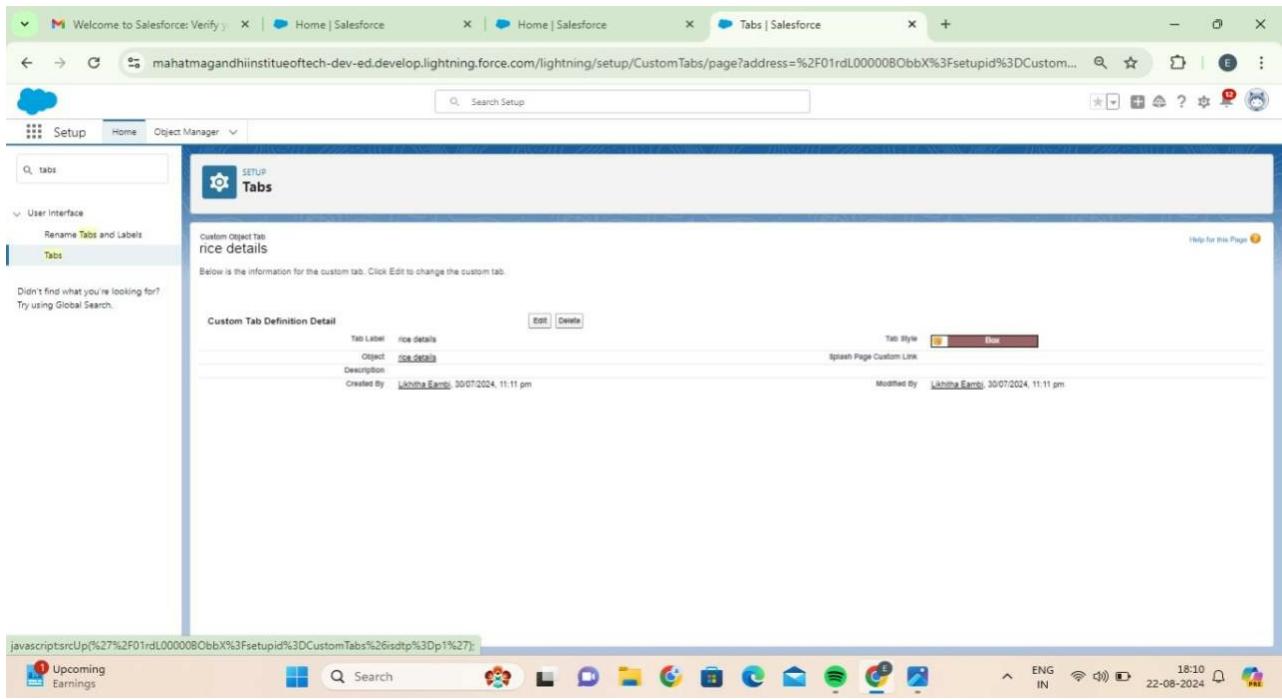
## rice mill Tab:



## consumer Tab:



### rice details Tab:



### Milestone 4 - The Lightning App:

An app is a collection of items that work together to serve a particular function. **Activity**  
**1: Create a Lightning App:**

Welcome to Salesforce: Verify

Lightning App Builder | App Settings | Pages | MY RICE - Lightning App Builder

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

App Details

\*App Name: MY RICE

\*Developer Name: MY\_RICE

Description: Enter a description...

App Branding

Image:

Primary Color Hex Value: #00702E

Org Theme Options: Use the app's image and color instead of the org's custom theme

App Launcher Preview

MY RICE

Welcome to Salesforce: Verify

Recently Viewed | supplier | Sales | MY RICE - Lightning App Builder

Lightning App Builder | App Settings | Pages | MY RICE

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 items that you add. Some 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

Type to filter list...

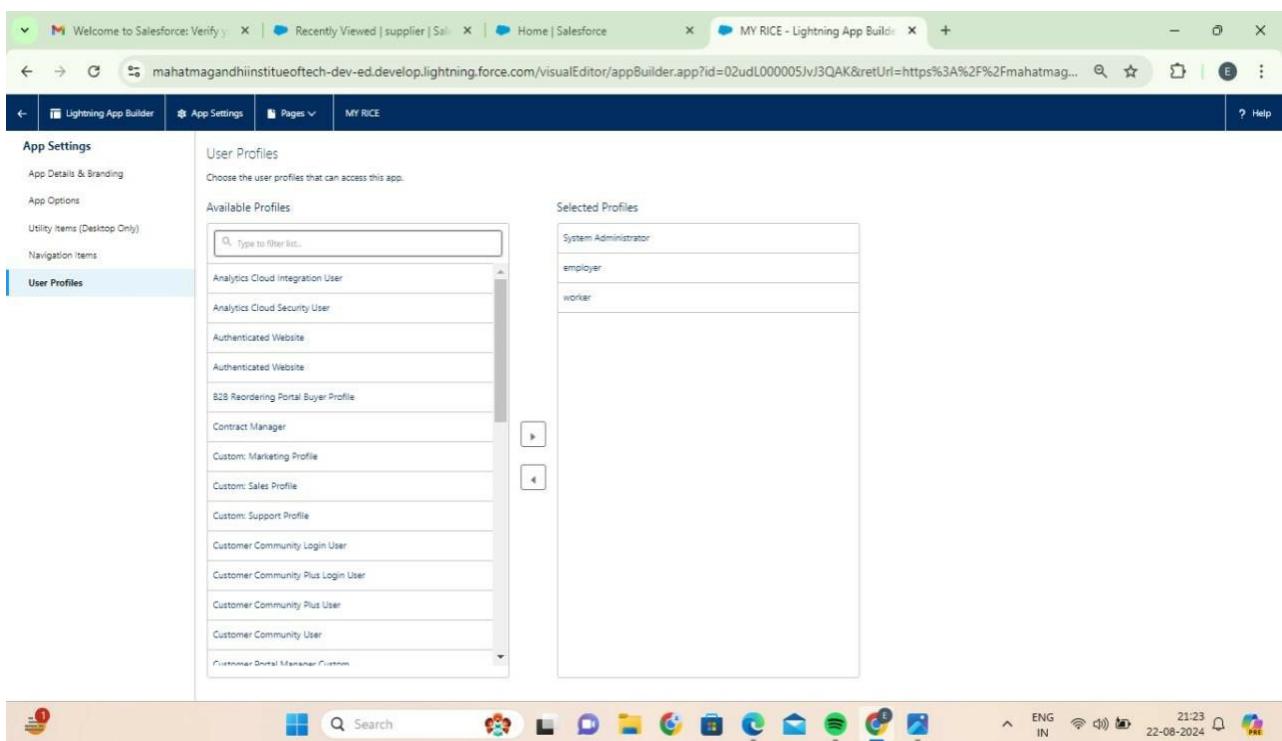
Create

- Accounts
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions
- Asset State Periods
- Assets
- Async Operation Logs

Selected Items

- supplier
- rice mills
- consumers
- rice details

Homestay 4B SG Internet access



## Milestone 5 - Fields:

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker. Types of

### Fields

**Standard Fields:** As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a nonrequired standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

- Created By
- Owner
- Last Modified
- Field Made During object Creation

**Custom Fields:** On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

## Creating The Fields In Rice Details Object:

The screenshot shows the Salesforce Object Manager interface for the 'rice details' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays a table titled 'Fields & Relationships' with 7 items. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
rice details Name	Name	Auto Number		✓
rice distributed	rice_distributed_c	Number(5, 0)		
rice mill 1	rice_mill_1_c	Master-Detail(rice mill)		✓
supplier Name	supplier_c	Master-Detail(supplier)		✓

## Creating The Fields In Consumer Object:

The screenshot shows the Salesforce Object Manager interface for the 'consumer' object. The left sidebar lists various setup options. The main area displays a table titled 'Fields & Relationships' with 14 items. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid_c	Formula(Number)		
Consumer Name	Consumer_Name_c	Formula(Text)		
consumer Name	Name	Auto Number		✓
Created By	CreatedBy	Lookup(User)		
email	email_c	Email		
First name	First_name_c	Text(5)		
Last Modified By	LastModifiedBy	Lookup(User)		
Last name	Last_name_c	Text(10)		
Mode of payment	Mode_of_payment_c	Picklist		
Phone number	Phone_number_c	Phone		

## Creating The Fields In Supplier Object:

The screenshot shows the Salesforce Object Manager interface for the 'supplier' object. The left sidebar lists various configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main 'Details' tab is selected, showing the following configuration details:

Setting	Value
Description	
API Name	supplier_c
Custom	✓
Singular Label	supplier
Plural Label	supplier
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

The status bar at the bottom indicates it's 18:06 on 22-08-2024, and the system is set to ENG IN.

## Creating The Fields In Rice Mill Object:

The screenshot shows the Salesforce Object Manager interface for the 'rice mill' object. The left sidebar lists various configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main 'Details' tab is selected, showing the following configuration details:

Setting	Value
Description	
API Name	rice_mill_c
Custom	✓
Singular Label	rice mill
Plural Label	rice mills
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

The status bar at the bottom indicates it's 18:05 on 22-08-2024, and the system is set to ENG IN.

## Creating The Validation Rule:

Validation Rules					
1 Items. Sorted by Rule Name					
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
PhonenumberRequiredRule	Top of Page	please fill in your phone number	✓	Ulkitha Eamby, 01/08/2024, 9:16 pm	<a href="#">Edit</a>

## Milestone 6 : Page layouts:

Page Layout in Salesforce allows us to customize the design and organize detail and edit pages of records in Salesforce.

### Activity 1 : creating the page layout:

## Milestone 7 - Profiles:

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by

the user's job function. For example System Administrator, Developer, Sales Representative.

### Types of profiles in salesforce

1. Standard profiles: By default salesforce provides below standard profiles.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager    Standard User
- System Administrator.

We cannot deleted standard ones Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

2. Custom Profiles: Custom ones defined by us. They can be deleted if there are no users assigned with that particular one.

### Activity 1: owner Profile:

The screenshot shows the Salesforce Setup interface for managing profiles. The URL in the browser is <https://mahatmagandhiinstituteoftech-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edL000005Loa1%2Fe%3FretURL%3D%2526id%2526page%253D2%2526isdp%253Dp1%2527>. The page title is "Profiles | Salesforce".

The main content area is titled "Profile Edit" for the "OWNER" profile. It shows the profile's name is "owner", it has a "User License" of "Salesforce", and it is a "Custom Profile". There is a note: "Set the permissions and page layouts for this profile."

Below this, there are two sections of checkboxes for "Custom App Settings" and "System Settings". The "Custom App Settings" section lists various apps like All Tabs, Analytics Studio, App Launcher, Automation, Bot Solutions, Community, Content, Data Manager, Digital Experiences, Lightning Experience, and Site. The "System Settings" section lists various system components like Data Management, Sales, Sales Console, Salesforce Chatbot, Salesforce Scheduler, Sample Console, Service, and Service Console.

At the bottom right of the page, there is a message: "Required Information".

The screenshot shows the Salesforce 'Profiles' setup page. The main area displays a grid of profiles, likely System Profiles, with columns for various object permissions. The profiles listed include: Business, Business Contact, Finance Selected Integration, Finance Translation, General Ledger, Inventory, Inventory Replenishment, Job Activity, Location, Location Group Assignment, Locations, Opportunities, Order, Payment Method, Sales, Sales Lead, Sales Opportunity, Sales Order, Sales Quota, Sales Rep, Sales Stage, Sales Team, Sales Type, and Workforce. Below the grid, there are sections for 'Custom Object Permissions', 'Session Settings', and 'Password Policies'. The browser status bar at the bottom indicates the URL is 'mahatmagandhiinstituteoftech-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edL000005Loa1%2Fe%3FretURL%3D...', the date is '22-08-2024', and the time is '22:15'. The operating system taskbar shows various application icons.

## Activity 2: employer Profile:

The screenshot shows the 'Profile Edit' page for a profile named 'employer'. The profile is set to 'Salesforce Platform' and is a 'Custom Profile'. The 'Custom App Settings' section includes 'Analytics Studio (standard\_\_Insight)', 'App Launcher (standard\_\_AppLauncher)', and 'MY RICE (MY\_\_RICE)'. The 'Service Provider Access' section has a checked checkbox for 'Override users' personal tab customizations'. Under 'Tab Settings', the 'Default On' tab is selected. The browser status bar at the bottom indicates the URL is 'mahatmagandhiinstituteoftech-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edL000005LbI%2Fe%3FretURL%3D...', the date is '22-08-2024', and the time is '22:15'. The operating system taskbar shows various application icons.

The screenshot shows the Salesforce 'Profiles' setup page. The main area displays a grid of permissions for different objects, such as Address, Account, and Contact. The grid includes columns for Edit, Create, Delete, and View. A sidebar on the left lists objects like Address, Account, and Contact. Below the grid, there are sections for 'System Used Permissions' and 'Session Settings'. The bottom of the screen shows the Windows taskbar with various icons and the date/time as 22-08-2024 at 22:16.

### Activity 3: worker Profile:

The screenshot shows the 'Profile Edit' page for the 'worker' profile. The profile name is 'worker', and it is assigned to the 'Salesforce Platform' user license. The 'Custom Profile' checkbox is checked. The page includes sections for 'Custom App Settings' (with 'MY RICE (MY\_RICE)' selected as the default), 'Service Provider Access', and 'Tab Settings' (with 'Tab Hidden' selected). The bottom of the screen shows the Windows taskbar with various icons and the date/time as 22-08-2024 at 22:17.

The screenshot shows the Salesforce Setup interface under the 'Profiles' section. It displays a grid of profiles and their permissions across several categories:

- Administrative Profiles:** Includes Administration, Automation, Configuration, Data, and System.
- Communication Profiles:** Includes Communication, Collaboration, and Marketing.
- Engagement Channel Types:** Includes Chat, Email, and SMS.
- Standard Profiles:** Includes Standard User, System Admin, and Super User.
- Custom Object Permissions:** Shows permissions for various custom objects like Case, Contact, Lead, and Opportunity.
- Session Settings:** Includes settings for Session Timeout, Password Policies, and Session Security Level Required at Login.

## Milestone 8 - Role & Role Hierarchy:

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization. **Creating Owner, Employer And Worker Roles:**

The screenshot shows the Salesforce Setup interface under the 'Roles' section. It includes a sidebar for 'Users' and 'Feature Settings'. The main content area displays the 'Understanding Roles' page, which explains how to set up a role hierarchy to control data access. A sample hierarchy diagram is shown:

```

graph TD
    CEO[CEO - President] --> CFO[CFO - VP, Sales]
    CFO --> WesternSalesDir[Western Sales Director]
    CFO --> EasternSalesDir[Eastern Sales Director]
    CFO --> InternationalSalesDir[International Sales Director]
    WesternSalesDir --> CARep1[CA Sales Rep]
    WesternSalesDir --> ORRep1[OR Sales Rep]
    EasternSalesDir --> NYRep1[NY Sales Rep]
    EasternSalesDir --> MARep1[MA Sales Rep]
    InternationalSalesDir --> ASRep1[Asian Sales Rep]
    InternationalSalesDir --> ERep1[European Sales Rep]
  
```

The page also includes a 'Set Up Roles' button and a 'Don't show this page again' checkbox.

## Milestone 9 - Users:

A user is anyone who logs in to Salesforce. Users are employees at your company, such

as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

## Activity 1: Create User:

The screenshot shows the Salesforce Setup interface for creating a new user. The user being created is named "LiKhitha Eambi". The "User Detail" section shows the following details:

- Name:** LiKhitha Eambi
- Alias:** LKhamb
- Email:** likhitha.eambi10213@gmail.com (Verified)
- Username:** lucky@mgit.com
- Nickname:** lucky [i]
- Title:** Manager
- Company:** Mahatma Gandhi Institute Of Technology
- Department:**
- Division:**
- Address:** IN (GMT+05:30) India Standard Time (Asia/Kolkata)
- Time Zone:** (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale:** English (India)
- Language:** English
- Delegated Approver:** Manager
- Receive Approval Request Emails:** Only if I am an approver
- Federation ID:**
- App Registration: One-Time Password Authentication:** [Connect] [i]
- App Registration: Salesforce Authenticator:** [Connect] [i]

The "Role" section indicates the user is a "System Administrator". The "Salesforce Profile" is set to "System Administrator". Other profiles listed include Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, and Send Apex Warning Emails. The "Salesforce CRM Content User" checkbox is checked.

## Activity 2: creating another users:

The screenshot shows the Salesforce Setup interface for creating another new user. The user being created is named "ragu raj". The "User Detail" section shows the following details:

- Name:** ragu raj
- Alias:** raj
- Email:** likhithaamb@gmail.com [Verify] [i]
- Username:** likhithaamb@gmail.com
- Nickname:** User17220137300000002041 [i]
- Title:**
- Company:**
- Department:**
- Division:**
- Address:** (GMT+05:30) India Standard Time (Asia/Kolkata)
- Time Zone:** (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale:** English (India)
- Language:** English
- Delegated Approver:** Manager
- Receive Approval Request Emails:** Only if I am an approver
- Federation ID:**
- App Registration: One-Time Password Authentication:** [i]
- App Registration: Salesforce Authenticator:** [i]

The "Role" section indicates the user is a "Standard Platform User". The "Salesforce Profile" is set to "Standard Platform User". Other profiles listed include Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, and Send Apex Warning Emails. The "Salesforce CRM Content User" checkbox is checked.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, a sidebar lists various categories like 'Permission Set Groups', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. The 'Users' section is expanded, showing a list of users. The main content area displays the 'User Detail' page for a user named 'Vicky Y'. The page includes fields for Name (vicky y), Alias (vy), Email (lkhtheamb@gmail.com), Username (lkhtheamb07@gmail.com), Nickname (User1722613049528305838), Title, Company, Department, Division, Address, Time Zone (GMT+05:30 India Standard Time (Asia/Kolkata)), Locale (English (India)), Language (English), Delegated Approver (Manager), Receive Approval Request Emails (Only if I am an approver), Federation ID, App Registration: One-Time Password Authenticator, and App Registration: Salesforce Authenticator. To the right, there are sections for Role (Salesforce), User License (Salesforce), Profile (Salesforce), and various checkboxes for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registration, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, Load Lightning Pages While Scripting, and Salesforce CRM Content User. At the bottom, a URL bar shows the path: javascript:srcUp(%27%2F005dL000005xCK1%3Fnoredirect%3D1%26isUserEntityOverride%3D1%26isdtp%3Dp1%27);

## Milestone 10 - Permission sets:

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles and are the recommended way to manage your users' permissions. **Activity 1: Creating OWD setting:**

The screenshot shows the Salesforce Setup interface with the 'Sharing Settings' tab selected. On the left, a sidebar lists 'Security' options: Guest User, Sharing Rule Access, Report, and Sharing Settings. The 'Sharing Settings' option is selected. The main content area displays the 'Sharing Settings' page. It includes sections for 'Sharing Rules' (Lead Sharing Rules, Account Sharing Rules, Opportunity Sharing Rules) and 'Other Settings' (Manager Groups, Secure guest user record access, Require permission to view record names in lookup fields). A table shows sharing rules for different object types: Work Type (Private, Private, Private, Private, Private, Private), Work Type Group (Public Read/Write, Controlled by Parent, Controlled by Parent, Public Read Only, Public Read Only), and consumer (Private, Private, Private, Private, Private, Private). At the bottom, a URL bar shows the path: https://mahatmagandhiinstituteoftech-dev-ed.lightning.force.com/lightning/setup/SecuritySharing/home

## Milestone 11 - Reports:

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the

resulting insights with others.

### Activity 1: Create Report:

The screenshot shows a Salesforce Lightning report titled "range of amount per day". The report details consumer purchases across different rice types and payment methods. Key data points include:

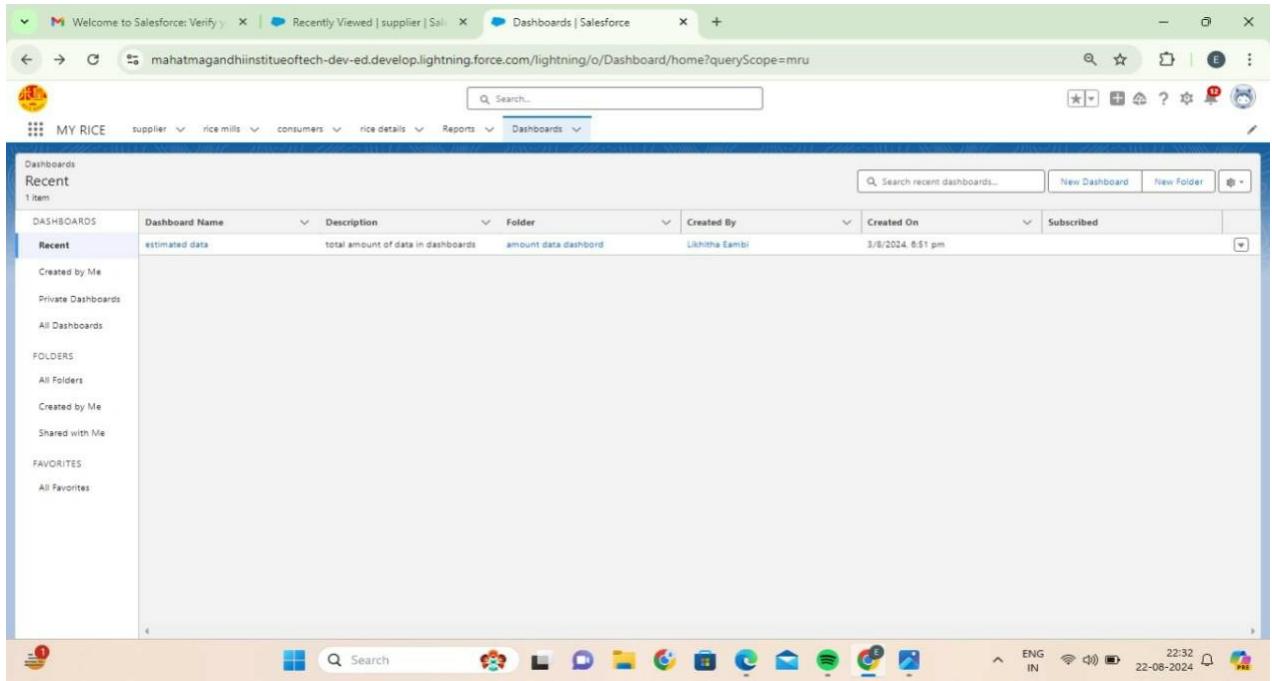
Rice taken by shops	Consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
5 (3)	Dharm A	basmati	40	Net banking	200.00
	Indhu B	basmati	40	Net banking	200.00
	Hema L	basmati	70	Debit card	350.00
Subtotal			110		750.00
10 (3)	Faria N	normal rice	30	UPI	300.00
	Gopi K	basmati	40	Credit card	400.00
	Lucky E	normal rice	70	UPI	700.00
Subtotal			140		1400.00
15 (3)	Esha G	normal rice	20	Cash	300.00
	Bhim A	basmati	30	Debit card	450.00
	Jai B	basmati	70	UPI	1050.00
Subtotal			120		1800.00
20 (1)	Charli Y	basmati	70	-	1400.00
Subtotal			70		1400.00
30 (1)	Abhi S	normal rice	20	Credit card	600.00
Subtotal			20		600.00

### Activity 2: Sharing report to owner:

The screenshot shows a Gmail inbox with a shared Salesforce report titled "range of amount per day". The report details consumer purchases across different rice types and payment methods. Key data points include:

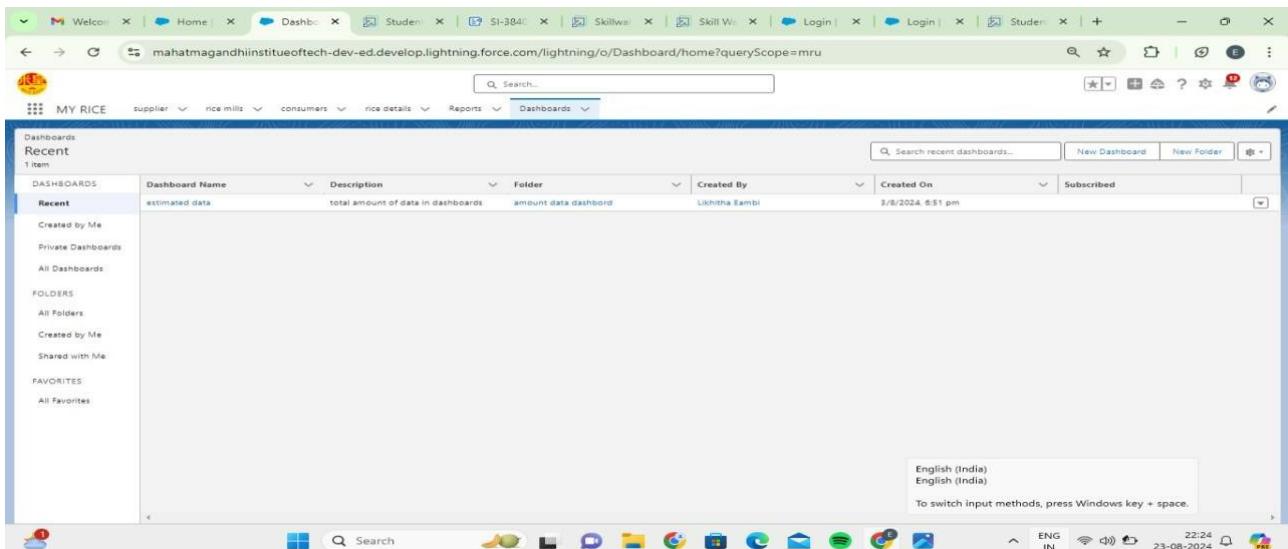
Rice taken by shops	consumer consumer Name	Rice type	rice price/kg Sum	Mode of payment	Amount Paid Sum
10 (2 records)	consumers-001	normal rice	10	Cash	100.00
	consumers-002	basmati	10	UPI	100.00
20 (4 records)	consumers-003	basmati	20	Credit card	400.00
	consumers-005	basmati	20	Net banking	400.00

### Activity 3: create a report folder:

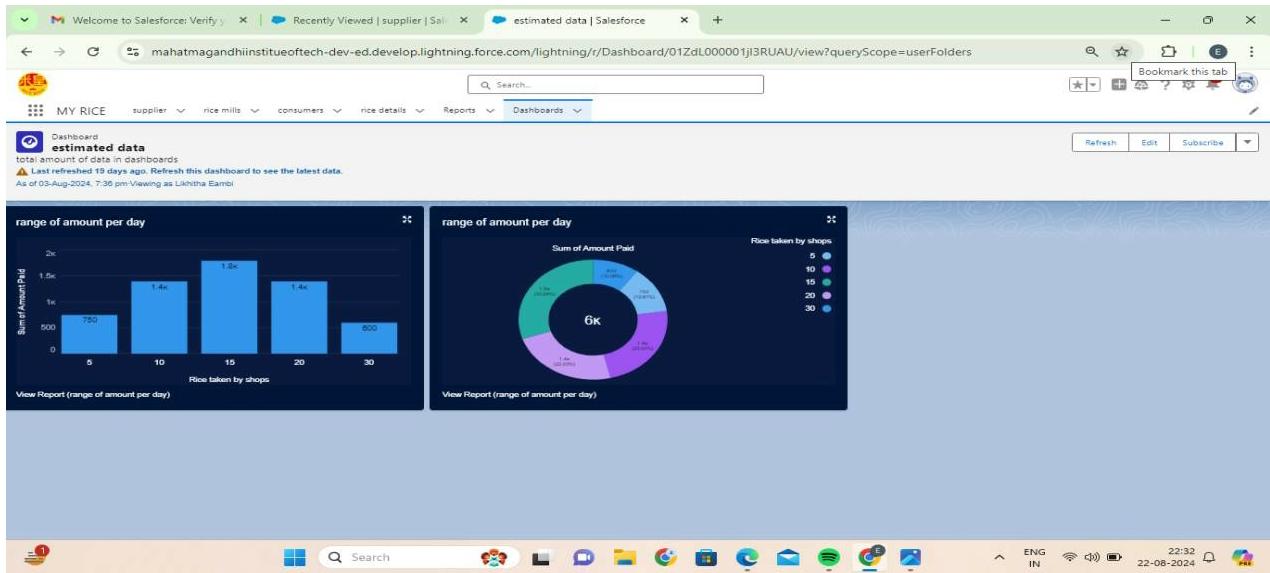


## Milestone 12 - Dashboards:

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. **Activity 1: Create Dashboard Folder:**



## Activity 2: Create Dashboard:



## Conclusion:

Implementing a CRM application for a wholesale rice mill can significantly enhance the operational efficiency and customer satisfaction levels. This system is designed to address the unique needs of the wholesale rice industry, providing a comprehensive suite of tools to manage customer interactions, streamline sales processes, and improve overall business performance.

### Key Benefits:

1. Improved Customer Relationships: The CRM application allows for detailed tracking of customer interactions, preferences, and purchase histories. This insight enables personalized service, timely follow-ups, and targeted marketing efforts, fostering stronger customer loyalty and retention.

2.



**Streamlined Sales and Order Management:** Automation of order processing, inventory management, and sales tracking reduces manual errors and accelerates transaction times. This leads to more accurate order fulfillment and efficient handling of large volumes of transactions typical in wholesale operations.

3. Enhanced Data Analytics: Advanced reporting and analytics tools provide valuable insights into sales trends, customer behavior, and market opportunities. This data-driven approach supports informed decision-making and strategic planning, ultimately contributing to increased profitability.

4. Operational Efficiency: By integrating various functions such as customer service, inventory control, and sales management into a single platform, the CRM application reduces redundancy and operational bottlenecks. This integration supports smoother workflows and better coordination among different departments.

5. Scalability and Flexibility: The CRM system is designed to adapt to the growing needs of the rice mill, accommodating increased transaction volumes and expanding customer

bases without compromising performance.

#### Strategic Impact:

The adoption of a CRM application positions the wholesale rice mill to achieve competitive advantage through enhanced customer engagement and operational excellence. By leveraging technology to optimize processes and gain deeper insights into market dynamics, the rice mill can drive growth, improve customer satisfaction, and secure a stronger market presence.

In summary, the CRM application is a valuable investment that empowers the wholesale rice mill to better manage customer relationships, streamline operations, and harness data for strategic growth. Embracing this technology will not only address current business challenges but also pave the way for future success in a competitive industry.

Feel free to adjust the specifics based on the unique features of the CRM system you're working with and the particular needs of the wholesale rice mill.