

Salesforce Virtual Internship Program

SmartInternz

A CRM APPLICATION FOR WHOLESALE RICE MILL

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Project Title : A CRM APPLICATION FOR WHOLESALE RICE MILL

1. Project Overview

This project focuses on developing a **CRM solution for wholesale rice mills** to track daily rice production, sales, and generate detailed reports for owners. By leveraging **Salesforce CRM**, the goal is to enhance **efficiency, data accuracy, and reporting clarity** to support operational growth.

Features

1. **Reports & Dashboards:** Daily insights on production, sales, revenue, and customer trends.
2. **Roll-Up Summary Field:** Summarizes data, e.g., total rice supplied by suppliers.
3. **Cross-Object Formula Field:** Calculates total cost (quantity × price/kg) for transactions.
4. **Validation Rules:** Ensures data integrity using checks like ISBLANK.
5. **Permission Sets:** Role-based access:
 - Owner: Full access.
 - Employer: Worker-level access only.

This solution optimizes rice mill operations and supports data-driven growth.

2. Objectives

Business Goals

1. **Enhance Operational Efficiency:**
Automate daily tracking of rice production, sales, and reporting to minimize manual effort and reduce errors.
2. **Improve Decision-Making:**
Provide actionable insights through detailed dashboards and analytics to optimize production and sales strategies.
3. **Ensure Secure Data Management:**
Implement role-based access to protect sensitive information and maintain data integrity.
4. **Increase Customer Satisfaction:**
Track customer trends to offer personalized services and improve the overall buying

experience.

Specific Outcomes

1. Daily Reports and Dashboards:

- Generate reports on rice production, sales, revenue, and customer trends.
- Deliver insights to owners in a visually accessible format.

2. Integrated Data Summaries:

- Use roll-up summary fields to aggregate data like total rice supplied or sold.

3. Accurate Cost Calculations:

- Implement cross-object formula fields for real-time payment computations (e.g., quantity × price/kg).

4. Data Validation:

- Ensure complete and accurate data entry using validation rules like ISBLANK.

5. Role-Based Access:

- Define roles (Owner, Employer, Worker) to control data visibility and maintain security.

These objectives align to streamline rice mill operations, enhance productivity, and deliver value-driven results.

3. Salesforce Key Features and Concepts Utilized

1. Reports and Dashboards:

- Customizable daily reports for production, sales, and revenue.
- Visual dashboards for real-time insights and trend analysis.

2. Roll-Up Summary Fields:

- Aggregates child-object data (e.g., total rice supplied) to parent records in master-detail relationships.
- Supports functions like COUNT, SUM, MIN, and MAX.

3. Cross-Object Formula Fields:

- Dynamically calculates values (e.g., quantity × price/kg) using fields from related objects.
- Provides accurate payment details on a single record.

4. Validation Rules:

- Ensures data integrity by enforcing conditions (e.g., ISBLANK for mandatory fields).
- Displays error messages for invalid or incomplete entries.

5. Permission Sets and Role Hierarchies:

- Implements **Organization-Wide Defaults (OWD)** to restrict baseline access.
- Defines roles for secure data access:
 - **Owner:** Full access to all records.
 - **Employer:** Access limited to worker records.

6. Automation and Efficiency:

- Streamlines workflows by reducing manual tasks through automated calculations and data summaries.

These Salesforce features enable a robust, secure, and efficient CRM system tailored to the unique needs of the rice mill.

4. Detailed Steps to Solution Design

1) Objects: Salesforce objects are database tables that permit you to store data that is specific to an organization.

Creation of Objects

Created the following objects:

- Supplier object
- Rice mill object
- Consumer object
- Rice details object

To create an object:

1. From the setup page - >Click on Object Manager ->Click on Create -> Click on Custom Object.
2. On Custom object defining page:
3. Enter the label name, plural label name, click on Allow reports, Allow search.
4. Click on Save.

Supplier Object:

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The top navigation bar includes a cloud icon, 'Search Setup', and various global buttons. The main title is 'SETUP > OBJECT MANAGER supplier'. On the left, a sidebar lists options like 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', etc. The main 'Details' section shows the following configuration:

Field	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

Buttons at the bottom right include 'Edit' and 'Delete'.

Rice mill object:

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The top navigation bar includes a cloud icon, 'Search Setup', and various global buttons. The main title is 'SETUP > OBJECT MANAGER rice mill'. On the left, a sidebar lists options like 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', etc. The main 'Details' section shows the following configuration:

Field	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

Buttons at the bottom right include 'Edit' and 'Delete'.

Consumer Object:

SETUP > OBJECT MANAGER
consumer

Details

Description

API Name
consumer_c

Custom ✓

Singular Label
consumer

Plural Label
consumers

Details

Edit **Delete**

Enable Reports ✓

Track Activities

Track Field History ✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Rice details object:

SETUP > OBJECT MANAGER
rice details

Details

Description

API Name
rice_details_c

Custom ✓

Singular Label
rice details

Plural Label
rice details

Details

Edit **Delete**

Enable Reports ✓

Track Activities

Track Field History ✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

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

Creation of Tabs

Created the following tabs:

- Consumers
- Rice details
- Rice mills
- Suppliers

To create a Tab:

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.

Search Setup

Setup Home Object Manager

User Interface

Rename Tabs and Labels

Tabs

Custom Object Tabs

Action	Label	Tab Style
Edit Del	consumers	Cup
Edit Del	rice details	Red Cross
Edit Del	rice mills	Ticket
Edit Del	supplier	Box

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

Kancharla Sneha Deepthi
gayatrividyaparishadcol256-dev-ed.develop...
Settings Log Out

DISPLAY DENSITY

✓ Comfy

Compact

OPTIONS

Switch to Salesforce Classic Add Username

Consumers tab:

Search Setup

Setup Home Object Manager

User Interface

Rename Tabs and Labels

Tabs

Custom Object Tab consumers

Custom Tab Definition Detail

Tab Label	Object	Splash Page	Status
consumers	consumer	Custom Link	Active

Description

Created By Kancharla Sneha Deepthi 29/12/2024, 2:41 pm

Modified By Kancharla Sneha Deepthi 29/12/2024, 2:41 pm

Rice details tab:

Custom Object Tab
rice details

Custom Tab Definition Detail

Tab Label	rice details	Edit Delete	
Object	rice details	Tab Style	
Description		Splash Page Custom Link	
Created By	Kancharia Sneha Deepthi, 29/12/2024, 2:42 pm	Modified By	Kancharia Sneha Deepthi, 29/12/2024, 2:42 pm

Rice mills tab:

Custom Object Tab
rice mills

Custom Tab Definition Detail

Tab Label	rice mills	Edit Delete	
Object	rice mill	Tab Style	
Description		Splash Page Custom Link	
Created By	Kancharia Sneha Deepthi, 29/12/2024, 2:42 pm	Modified By	Kancharia Sneha Deepthi, 29/12/2024, 2:42 pm

Suppliers tab:

Custom Object Tab
supplier

Custom Tab Definition Detail

Tab Label	supplier	Edit Delete	
Object	supplier	Tab Style	
Description		Splash Page Custom Link	
Created By	Kancharia Sneha Deepthi, 29/12/2024, 2:39 pm	Modified By	Kancharia Sneha Deepthi, 29/12/2024, 2:39 pm

3)The Lightning App:An app is a collection of items that work together to serve a

particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

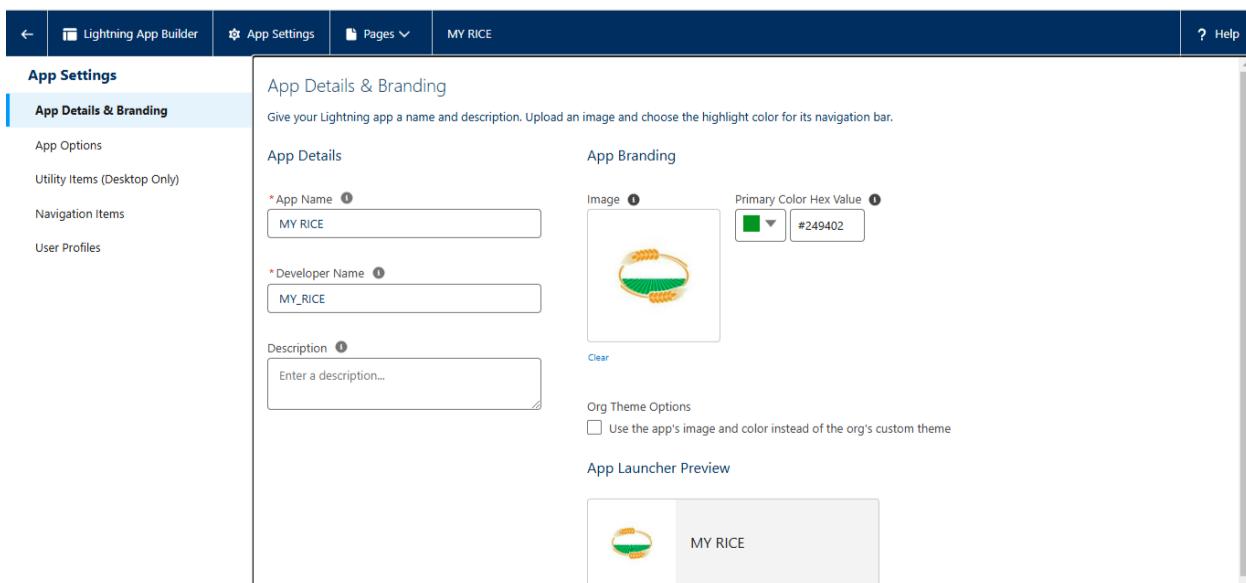
Creation of Lightning App

1. To create a lightning app page:
2. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.
3. Fill the app name in app details as MY RICE >> Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.
4. Upload a photo that is related to your app.
5. To add Navigation Item:

Select the items (supplier, rice mill, consumer , Rice details) from the search bar and move it using arrow button >> Next.

6. To Add User Profiles:

Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.



4)Fields: 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.

Creating the number field in rice details object

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

details object

2. Click on fields & relationship >> click on New.
3. Select Data type as "Number" and click Next.
4. Given the Field Label as " rice distributed " and length as " 5 ".
5. Field Name will be auto populated, and click on Next- Next >> Save.

The screenshot shows the Salesforce setup interface with the 'Object Manager' selected. Under 'rice details', the 'Fields & Relationships' tab is active. A table lists seven fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
rice details Name	Name	Auto Number		✓
rice distributed	rice_distributed__c	Number(5, 0)		
rice mill 1(one)	rice_mill__c	Master-Detail(rice mill)		✓
supplier name	supplier_name__c	Number(5, 0)		
supplier Name	supplier__c	Master-Detail(supplier)		✓

Creating Junction Object

A Junction object is a custom object that serves as a bridge between two related objects in a many-to-many relationship. It allows you to create a relationship between records of two different objects by creating a many-to-many relationship model.

Creating junction object as rice details with supplier & rice mill

1. Go to the setup page >> click on object manager >> From drop down click edit for rice details object
2. Click on fields & relationship - click on New.
3. Select "Master-Detail relationship" as data type and click Next.
4. Select the related object " supplier " and click next.
5. Give Field Label as "supplier Name" and click Next.
6. Next >> Next >> Save & New.
7. Follow the same steps from 1 to 3.
8. Select the related object " rice mill " and click Next.
9. Give Field Label as "rice mill 1(one)" and click Next.
10. Next >> Next >> Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a cloud icon, 'Search Setup' (with a magnifying glass icon), and various global buttons like 'New', 'Edit', 'Delete', etc. The main header says 'SETUP > OBJECT MANAGER' and 'rice details'. On the left, a sidebar lists 'Fields & Relationships' under 'Details', with other options like 'Page Layouts', 'Lightning Record Pages', etc. The main content area is titled 'Custom Field Definition Detail' for 'supplier Name'. It shows field information: Field Label 'supplier Name', Field Name 'supplier', API Name 'supplier__c', Description 'rice details', Help Text 'rice details', Data Owner 'rice details', Field Usage 'rice details', Data Sensitivity Level 'rice details', Compliance Categorization 'rice details', Created By 'Kanchala Sneha Deepthi' (29/12/2024, 3:25 pm), Modified By 'Kanchala Sneha Deepthi' (29/12/2024, 3:25 pm), and a note about Master-Detail Options: Related To 'supplier', Related List Label 'rice details', Sharing Setting 'Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.', and Reparentable Master Detail 'rice details'.

Creating a Master-Detail Relationship

master-detail relationship is a type of relationship between two objects where the master object controls certain behaviors and settings of the detail object. Here are a few use cases that demonstrate the use of master-detail relationships

Creating Master-Detail Relationship between consumer & rice mill Object

To Create a Master-Detail relationship:

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

Creating the Roll-up Summary

A rollup summary field 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.

Creating the Roll-up summary field on supplier & rice mill Objects.

1. Go to setup >> click on Object Manager >> type object name(supplier) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select the data type as “Rollup summary”, and click Next.
4. Give the Field label as “ sum of rice distributed ”, Field Name will be Auto generated, and click Next.
5. Select the summarized object as “ rice details ”.
6. Select the Rollup type as “sum”.
7. Select the field to aggregate as “ rice distributed ”, and click Next >>Next >>Save.
8. Follow the same steps for the rice mill Object from 1 to 3
9. Give the Field label as “ rice distributed to shops ”, Field Name will be Auto generated, and click Next.
10. Select the summarized object as “ rice details ”.
11. Select the Rollup type as “sum”.
12. Select the field to aggregate as “ rice distributed ”, and click Next >> Next >> Save.
13. Note : create the field as “ rice taken by shops in kgs ” using number datatype in consumer object
14. Follow the same steps for the rice mill Object from 1 to 3
15. Give the Field label as “ rice taken ”, Field Name will be Auto generated, and click Next.
16. Select the summarized object as “ consumer ”.

17. Select the Rollup type as "sum".

18. Select the field to aggregate as " rice taken in shops ", and click Next >> Next >> Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a cloud icon, 'Search Setup', and various global buttons. The main header says 'SETUP > OBJECT MANAGER' and 'supplier'. On the left, a sidebar lists options like 'Details', 'Fields & Relationships' (which is selected), and 'Page Layouts'. The main content area displays a 'Custom Field Definition Detail' for 'supplier Custom Field sum of rice distributed'. It shows the field label 'sum of rice distributed', field name 'sum_of_rice_distributed', and API name 'sum_of_rice_distributed_c'. The 'Object Name' is 'supplier'. Under 'Roll-Up Summary Options', the 'Data Type' is 'Roll-Up Summary', 'Summarized Object' is 'rice details', and 'Summary Type' is 'SUM'. The 'Created By' and 'Modified By' fields both show 'Kancharya Sneha Deepthi' with the date '29/12/2024, 3:30 pm'.

Creating Fields in Objects

Creating the number field in rice details object

1. Go to the setup page >> click on object manager >> From drop down click edit for rice details object.
2. Click on fields & relationship >> click on New.
3. Select Data type as "master detail" and click Next.
4. Given the Field Label as " supplier name " and length as " 5
5. Field Name will be auto populated, and click on Next>> Next >> Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a cloud icon, 'Search Setup', and various global buttons. The main header says 'SETUP > OBJECT MANAGER' and 'rice details'. On the left, a sidebar lists options like 'Details', 'Fields & Relationships' (which is selected), and 'Page Layouts'. The main content area displays a 'Custom Field Definition Detail' for 'rice details Custom Field Supplier Name'. It shows the field label 'supplier Name', field name 'supplier', and API name 'supplier_c'. The 'Object Name' is 'rice details' and the 'Data Type' is 'Master-Detail'. The 'Created By' and 'Modified By' fields both show 'Kancharya Sneha Deepthi' with the date '29/12/2024, 3:25 pm'. Under 'Master-Detail Options', the 'Related To' field is 'supplier' and the 'Child Relationship Name' is 'rice_details'.

Creating Fields in rice mill Objects

1. Select Data type as “Number” and click Next.
2. Given the Field Label as “rice price/kg” and length as “5”

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. Under the 'rice mill' object, a new custom field named 'rice price/kg' is being created. The 'Field & Relationships' tab is active. The 'Custom Field Definition Detail' section shows the following details:

- Field Information:**
 - Field Label: rice price/kg
 - Field Name: rice_price_kg
 - API Name: rice_price_kg_c
 - Description: (empty)
 - Help Text: (empty)
 - Data Owner: (empty)
 - Field Usage: (empty)
 - Data Sensitivity Level: (empty)
 - Compliance Categorization: (empty)
- General Options:**
 - Required:
 - Unique:

At the top right, there are buttons for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Object Name' is set to 'rice mill' and the 'Data Type' is 'Number'. The 'Created By' and 'Modified By' fields both show 'Kanchala Sneha Deepthi' with the timestamp '29/12/2024, 9:16 pm'.

Creating Fields in consumer Objects

Fields	Data type
First name	Text
Last name	Text
Phone number	phone
email	email
Rice taken by shops	Number (length=5)
Rice type	(Picklist values) 1.basmati 2.normal rice
Mode of payment	Picklist values <ul style="list-style-type: none">• Credit card• Debit card• Net banking• UPI• Cash

SETUP > OBJECT MANAGER
consumer

Fields & Relationships				
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	CreatedById	Lookup(User)		
email	email__c	Email		
First name	First_name__c	Text(255)		
Last Modified By	LastModifiedById	Lookup(User)		

Creating Cross Object Formula Field in consumer Object

A cross-object formula field is a formula field that references fields from another object in Salesforce. This type of formula allows users to calculate and display data from multiple objects on a single record

1. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Amount Paid " and select formula return type as "Number" and click next.
5. Insert fields formula should be :
rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c
6. Under Advanced Formula write down the formula and click "Check Syntax" and Save.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A search bar at the top contains 'Search Setup'. Below it, a navigation bar has 'Setup', 'Home', and 'Object Manager' buttons. The main content area is titled 'SETUP > OBJECT MANAGER consumer'. On the left, a sidebar lists various setup categories like 'Page Layouts', 'Fields & Relationships', and 'Search Layouts'. The right pane shows a 'Custom Field Definition Detail' for a field named 'Amount Paid' on the 'consumer' object. The field information includes its label ('Amount Paid'), name ('Amount_Paid'), and API name ('Amount_Paid_c'). It also shows the data type as 'Formula', created by 'Kancharia Sneha Deepthi' on 29/12/2024, and modified by the same user at the same time.

1. Creating the Formula field in consumer Object
2. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
3. Click on fields & relationship >> click on New.
4. Select Data type as “Formula” and click Next.
5. Give Field Label and Field Name as “Consumer Name” and select formula return type as “TEXT” and click next.
6. Insert field formula should be : First_Name__c + '' + Last_Name__c
7. click “Check Syntax” and Save.

This screenshot shows the configuration of the 'consumer Name' formula field. The field label is 'consumer Name' and the field name is 'Name'. The data type is set to 'Auto Number'. A note in the 'Field Information' section states 'consumer Field: consumer Name ~ Salesforce - Developer Edition'. The 'Display Format' is set to 'consumers-(000)'.

Creating the validation rule

Improve the quality of your data using validation rules. Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of "True" or "False". 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.

Creating the validation rule for phone number field in consumer object

1. Go to the setup page >>click on object manager >> From drop down click edit for consumer object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as "Phonenumberoremailblankrule".
4. Enter the description as "phone number and email number should not be blank".
5. Enter the formula as "OR(ISBLANK(phone_number_c), ISBLANK(email_c))" and check the syntax.
6. Under the error message write as"please fill in your phone number."
7. Select error location "top of page".
8. Save the validation rule.

The screenshot shows the Salesforce Object Manager. The top navigation bar includes a cloud icon, 'Search Setup', and various global buttons. The main header reads 'SETUP > OBJECT MANAGER consumer'. On the left, a sidebar menu under 'Fields & Relationships' lists options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The central panel displays the 'consumer Custom Field Phone number' details. It shows the field's label ('Phone number'), name ('Phone_number'), and API name ('Phone_number_c'). Other visible details include 'Object Name: consumer', 'Data Type: Phone', and a note about 'Validation Rules'. The bottom section shows 'General Options' with a 'Required' checkbox checked. The status bar at the bottom right indicates the record was created by 'Kancharia Sneha Deepthi' on 29/12/2024, 9:21 pm, and modified by the same user on the same date and time.

5)Page layouts

Page Layout in Salesforce allows us to customize the design and organize detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

To Create a Page layout:

1. Go to Setup >> Click on Object Manager >> Search for the object (consumer) >> From drop down select the object and click on it.
2. Click on Page layout >> Click on New.
3. Select the existing page layout, and give the page layout name as "consumer layout", and click save.
4. Drag and drop the section field to consumer details and create the section.
5. Enter the section name as "Personal details", - click Ok.
6. Now drag the fields to this section that mentioned , they are
7. First name , last name , consumer name , phone number, email, rice mill name.
8. Follow the same process for another two sections as shown above , they are
9. One section is " rice details ", drag the fields that are Rice taken by shop, rice type.
10. Another section is "Receipt details ", and drag the fields that are Mode of payment , Amount paid.
11. Then , Click save.

6) 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.

owner Profile

To create a new profile:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (owner) >> Save.
2. Scroll down to Custom Object Permissions and Give access permissions for consumers, rice details , rice mill and suppliers objects as mentioned in the below diagram.
3. Give access and save it.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. In the 'Profile Detail' section, the profile is named 'owner' with 'Salesforce' as the User License. Under 'Page Layouts', there is a grid mapping standard object layouts to various record types. For example, 'Global' layouts are assigned to 'Global Layout' for most objects like Account, Case, Contact, etc., while specific layouts like 'Alternative Payment Method Layout' and 'Appointment Invitation Layout' are assigned to their respective objects.

Object	Layout	Record Type
Global	Global Layout	Invoice
Email Application	Not Assigned	Invoice Line
Home Page Layout	DE Default	Lead
Account	Account Layout	Legal Entity
Alternative Payment Method	Alternative Payment Method Layout	Location
Appointment Invitation	Appointment Invitation Layout	Location Group
Asset	Asset Layout	Location Group Assignment
Asset Action	Asset Action Layout	Macro

This screenshot shows the 'Profiles' page with the 'Custom Object Permissions' section expanded. It lists permissions for four custom objects: 'consumers', 'rice details', 'rice mills', and 'supplier'. Each object has two permission sets: 'Basic Access' and 'Data Administration'. Under 'Session Settings', it shows a session times out after 2 hours of inactivity and requires login security at the session level. The 'Password Policies' section includes settings for password expiration, history, length, complexity, and login attempts.

Object	Basic Access						Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
consumers	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
rice details	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
rice mills	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
supplier	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Employer Profile

1. Go to setup >> type profiles in quick find box >>click on profiles >> clone the desired profile (Standard Platform User) >> enter profile name (employer) >> Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the rice mill.

4. Scroll down to Custom Object Permissions and Give access permissions for consumer, rice details , rice mill and suppliers objects as mentioned in the below diagram.
5. And click save.

The screenshot shows the Salesforce Setup interface under the Profiles section. In the Profile Detail section, the profile is named 'employer' with a User License of 'Salesforce Platform'. The 'Custom Profile' checkbox is checked. In the Standard Object Layouts section, various object layouts are listed with their global equivalents:

Object	Global Layout	Custom Layout
User License	Not Assigned	Fulfillment Order Item Tax
Email Application	Home Page Default	Fulfillment Order Product
Home Page Layout	Account Layout	Idea
Account	Alternative Payment Method Layout	Individual
Alternative Payment Method	Appointment Invitation Layout	Invoice
Appointment Invitation	Asset Layout	Invoice Line
Asset		Lead

The screenshot shows the Salesforce Setup interface under the Profiles section. It includes several configuration sections:

- Contact Point Settings:** Contact Point Addresses, Contact Point Consents, Contact Point Emails, Sellers, Streaming Channels, User External Credentials.
- Custom Object Permissions:** A grid showing access levels (Read, Create, Edit, Delete, View All, Modify All) for objects like consumers, rice details, rice mills, and supplier.
- Session Settings:** Session Times Out After (2 hours of inactivity), Session Security Level Required at Login.
- Password Policies:** User passwords expire in 90 days, Enforce password history 3 passwords remembered, Minimum password length 8, Password complexity requirement Must include alpha and numeric characters, Password question requirement Cannot contain password.

Worker Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard Platform User) >> enter profile name (worker) >> Save.

2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the rice mill.
4. Scroll down to Custom Object Permissions and Give access permissions for consumer, rice details , rice mill and suppliers objects as mentioned in the below diagram.
5. And click save.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The 'worker' profile is selected. The 'Page Layouts' section displays a grid of object layouts assigned to specific record types. For example, the 'Global' layout is assigned to 'Fulfillment Order Item Tax'. Other assignments include 'Email Application' to 'Fulfillment Order Product', 'Home Page Layout' to 'Idea', 'Account' to 'Individual', 'Alternative Payment Method' to 'Invoice', 'Appointment Invitation' to 'Invoice Line', 'Asset' to 'Lead', and 'Asset Relationship' to 'Location'.

The screenshot shows the 'Custom Object Permissions' section of the 'worker' profile. It includes sections for 'Contact Point Consents', 'Streaming Channels', 'User External Credentials', and 'Session Settings'. Under 'Custom Object Permissions', there are two tables for 'Basic Access' and 'Data Administration' for objects like 'consumers', 'rice details', 'rice mills', and 'supplier'. For 'Basic Access', checkboxes are present for Read, Create, Edit, Delete, View All, and Modify All. For 'Data Administration', checkboxes are present for Read, Create, Edit, Delete, View All, and Modify All.

7)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.

Created roles :

- Owner
- Employer

Owner 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

Help for this Page [?](#)

Show in tree view [▼](#)

Role Hierarchy:

- Gayatri Vidya Parishad College of Engineering
 - CEO
 - CFO
 - COO
 - owner
 - SVP.Customer Service & Support
 - SVP.Human Resources
 - SVP.Sales & Marketing

Action Buttons:

- Add Role
- Edit | Del | Assign
- Add Role

Role Detail

Role Name: owner

Label: owner

This role reports to: CEO

Modified By: Kanchantra Sneha Deepthi, 30/12/2024, 1:04 pm

Opportunity Access: Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities

Case Access: Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases

Sharing Groups: Role, Role and Internal Subordinates

Users in owner Role [1]

Action	Full Name	Alias	Username	Active
Edit	Vicky V	VV	newv@v.com	✓

Employer role

Setup Home Object Manager

Search Setup

SETUP Roles

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](#) [Show in tree view](#)

- Gayatri Vidyaparishad College of Engineering**
 - Add Role**
 - CEO** Edit | Del | Assign
 - CFO** Edit | Del | Assign
 - COO** Edit | Del | Assign
 - owner** Edit | Del | Assign
 - employer** Edit | Del | Assign
 - worker** Edit | Del | Assign
 - SVP, Customer Service & Support** Edit | Del | Assign

Help for this Page ?

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

Setup Home Object Manager

Search Setup

SETUP Roles

Role employer

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Gayatri Vidyaparishad College of Engineering > CEO > owner > employer

[Users in employer Role](#)

Action	Full Name	Alias	Username	Active
Edit	ram ram	rram	new2@ram.com	✓

Help for this Page ?

Role Detail

Label	Role Name
employer	employer

This role reports to **owner** Role Name as displayed on reports

Modified By **Kanchanika Sneha Deepthi**, 30/12/2024, 1:06 pm Sharing Groups **Role, Role and Internal Subordinates**

Opportunity Access Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities

Case Access Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases

Users in employer Role Help ?

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

Setup Home Object Manager

Search Setup

SETUP Roles

Role worker

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Gayatri Vidyaparishad College of Engineering > CEO > owner > employer > worker

[Users in worker Role](#)

Action	Full Name	Alias	Username	Active
Edit	ragu raju	rraj	new3@raju.com	✓

Help for this Page ?

Role Detail

Label	Role Name
worker	worker

This role reports to **employer** Role Name as displayed on reports

Modified By **Kanchanika Sneha Deepthi**, 30/12/2024, 1:09 pm Sharing Groups **Role, Role and Internal Subordinates**

Opportunity Access Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities

Case Access Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases

Users in worker Role Help ?

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

8)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.

Create User

1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
3. First Name : vicky
4. Last Name : y
5. Alias : Give a Alias Name
6. Email id : Give your Personal Email id
7. Username : Username should be in this form: text@text.text
8. Nick Name : Give a Nickname
9. Role : owner
10. User license : Salesforce
11. Profiles : owner
12. Save it.

The screenshot shows the Salesforce Setup interface. The left sidebar is collapsed, and the main area displays the 'Users' page under the 'SETUP' tab. A search bar at the top right contains the text 'Search Setup'. Below the search bar are various icons for navigation and help. The main content area shows a list of users, with one user named 'vicky y' selected. The 'User Detail' section for 'vicky y' is expanded, showing the following information:

Name	vicky y	Role	owner
Alias	vy	User License	Salesforce
Email	322103310097@gypce.ac.in [Verify]	Profile	owner
Username	newvy.com	Active	<input checked="" type="checkbox"/>
Nickname	vicky	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View

At the bottom of the page, there is a note: "Didn't find what you're looking for? Try using Global Search."

User Detail

Name	ram ram	Role	employee
Alias	rram	User License	Salesforce Platform
Email	322103310097@gyoce.ac.in [Verify]	Profile	Standard Platform User
Username	new2@ram.com	Active	<input checked="" type="checkbox"/>
Nickname	ram	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View

User Detail

Name	ragu raj	Role	worker
Alias	rraj	User License	Salesforce Platform
Email	322103310097@gyoce.ac.in [Verify]	Profile	Standard Platform User
Username	new3@raj.com	Active	<input checked="" type="checkbox"/>
Nickname	raj	Marketing User	<input type="checkbox"/>
Title	<th>Offline User</th> <td><input type="checkbox"/></td>	Offline User	<input type="checkbox"/>
Company	<th>Knowledge User</th> <td><input type="checkbox"/></td>	Knowledge User	<input type="checkbox"/>
Department	<th>Flow User</th> <td><input type="checkbox"/></td>	Flow User	<input type="checkbox"/>
Division	<th>Service Cloud User</th> <td><input type="checkbox"/></td>	Service Cloud User	<input type="checkbox"/>
Address	<th>Site.com Contributor User</th> <td><input type="checkbox"/></td>	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View

9)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.

Creating OWD setting

1. Go to setup >> type “sharing settings ” in quick search >> Click edit.
2. Scroll down, change the default internal access to “ public read-only” for rice mill and supplier object.

3. Click save.
4. Extra information, By these every profile has their own access, according to their profile.
5. 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.

Object	Share Type	Access Level	
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

Manager Groups [i](#)

Secure guest user record access [i](#)

Require permission to view record names in lookup fields [i](#)

[Other Settings Help ?](#)

Sharing Rules

10)Report

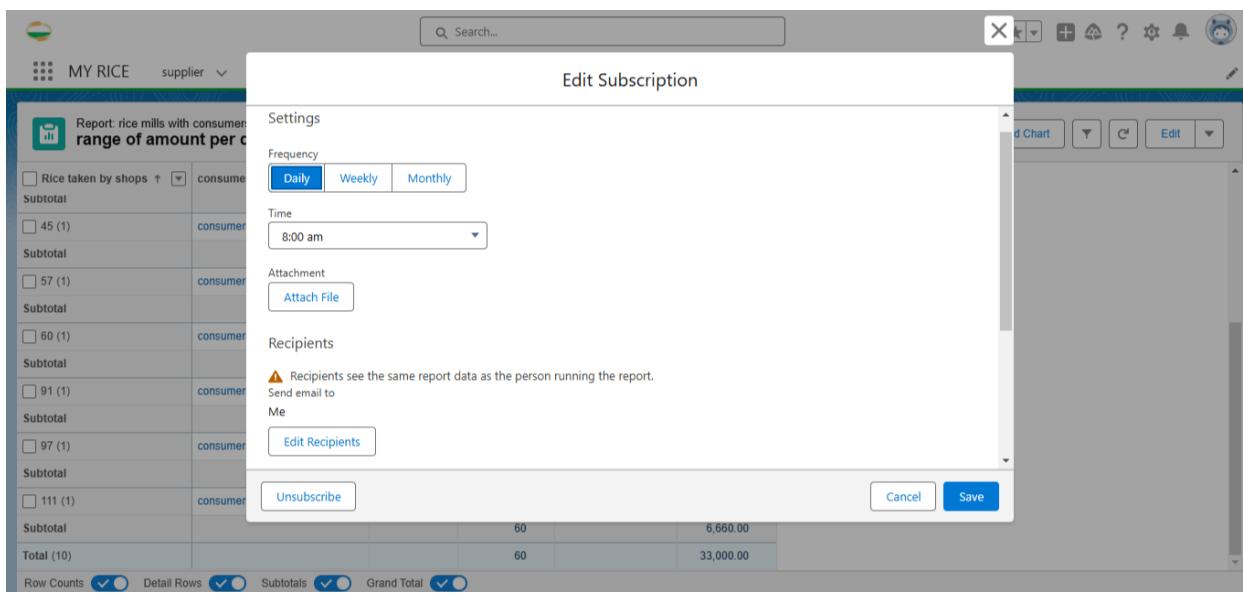
Create Report:

1. Go to the app >>click on the reports tab
 2. Click New Report.
 3. select for report type, search for “rice mill with consumers” click on it. And click on start report.
 4. Their outline pane is opened already, select the fields that are mentioned below in the column section.
 - a. consumer name
 - b. rice type
 - c. rice price/kg
 - d. mode of payments
 - e. amount paid
 5. Remove the unnecessary fields.
 6. Select the fields that are mentioned below in the GROUP ROWS section.
 7. Rice taken by shops
- Click save and run and save the report as “range of amount per day”.and save it

Total Records	Total rice pricing	Total Amount Paid	
	10	60	33,000.00
<input type="checkbox"/> Rice taken by shops ↑ <input type="checkbox"/> consumer consumer Name ↗ <input type="checkbox"/> Rice type ↗ <input type="checkbox"/> rice price/kg ↗ <input type="checkbox"/> Mode of payment ↗ <input type="checkbox"/> Amount Paid ↗			
<input type="checkbox"/> 15 (1)	consumers-005	basmati	60 UPI 900.00
Subtotal			60 900.00
<input type="checkbox"/> 18 (1)	consumers-007	basmati	60 Debit card 1,080.00
Subtotal			60 1,080.00
<input type="checkbox"/> 23 (1)	consumers-003	basmati	60 Net banking 1,380.00
Subtotal			60 1,380.00
<input type="checkbox"/> 33 (1)	consumers-006	basmati	60 Net banking 1,980.00
Subtotal			60 1,980.00
<input type="checkbox"/> 45 (1)	consumers-002	normal rice	60 Net banking 2,700.00
Subtotal			60 2,700.00
<input type="checkbox"/> 57 (1)	consumers-001	basmati	60 Cash 3,420.00
Subtotal			60 3,420.00
<input type="checkbox"/> 60 (1)	consumers-004	basmati	60 Cash 3,600.00
Subtotal			60 3,600.00
<input type="checkbox"/> 91 (1)	consumers-009	basmati	60 Debit card 6,480.00
Subtotal			60 6,480.00
<input type="checkbox"/> 97 (1)	consumers-010	normal rice	60 Net banking 6,800.00
Subtotal			60 6,800.00
<input type="checkbox"/> 111 (1)	consumers-008	normal rice	60 Credit card 6,660.00
Subtotal			60 6,660.00
Total (10)			60 33,000.00

Sharing report to owner

1. Click edit drop down and select subscribe option
2. Follow as per below image.
3. After selecting the run report as a “another person” select your personal account or whom you want to send that mail to.
4. Click save.



create a report folder

1. Click on the app launcher and search for reports.
2. Double click on the report, “reports tab” will be auto populated in the navigation bar.

3. Click on the report tab, click on the new folder.
4. Give the Folder label as “estimated rice per day”, Folder unique name will be auto populated.
5. Click save.
6. navigate to app launcher and click reports on that.
7. click all reports.
8. Select the range of amount per day drop down in that click move.
9. Select estimated rice per day folder and select folder.

	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	Einstein Bot Reports	Automated Process	29/12/2024, 12:09 pm	Automated Process	29/12/2024, 12:09 pm
Created by Me	Einstein Bot Reports Spring '23	Automated Process	29/12/2024, 12:09 pm	Automated Process	29/12/2024, 12:09 pm
Private Reports	Einstein Bot Reports Summer '23	Automated Process	29/12/2024, 12:09 pm	Automated Process	29/12/2024, 12:09 pm
Public Reports	Einstein Bot Reports Summer '22	Automated Process	29/12/2024, 12:09 pm	Automated Process	29/12/2024, 12:09 pm
All Reports	Einstein Bot Reports Winter '23	Automated Process	29/12/2024, 12:09 pm	Automated Process	29/12/2024, 12:09 pm
FOLDERS	Enablement Dashboard Reports Spring '24	Automated Process	29/12/2024, 12:09 pm	Automated Process	29/12/2024, 12:09 pm
All Folders	Enablement Dashboard Reports Summer '24	Automated Process	29/12/2024, 12:09 pm	Automated Process	29/12/2024, 12:09 pm
	estimated rice per day	Kancharla Sneha Deepthi	30/12/2024, 3:30 pm	Kancharla Sneha Deepthi	30/12/2024, 3:30 pm

11)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. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

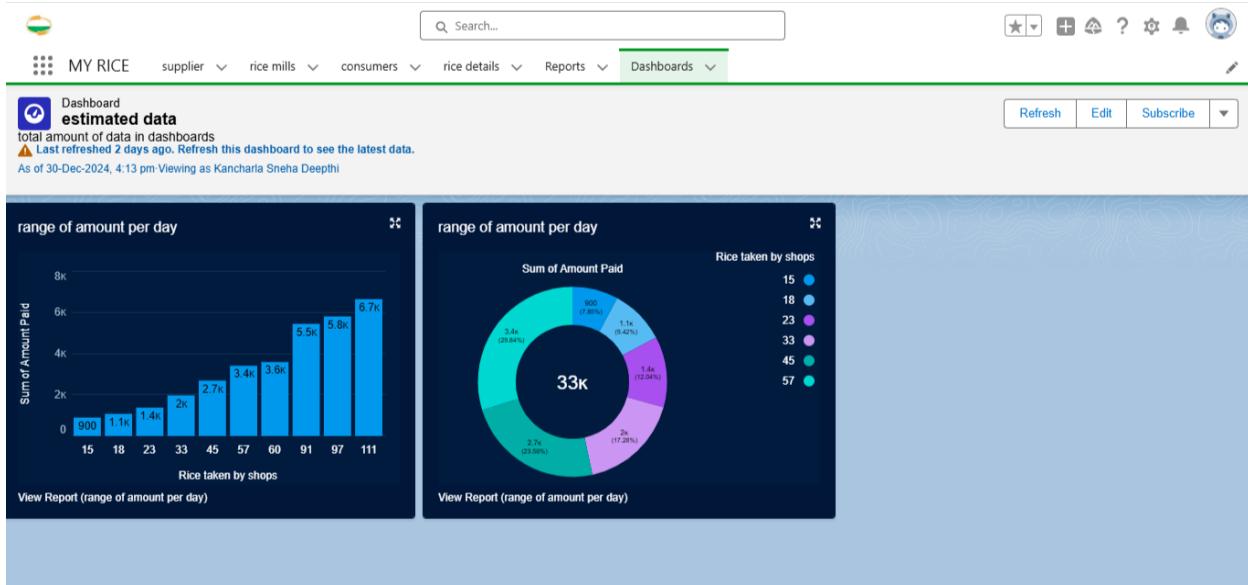
Create Dashboard Folder

1. Click on the app launcher and search for the dashboard.
2. Click on the dashboard tab.
3. Click the new folder, give the folder label as “amount data dashboard”.
4. Folder unique names will be auto populated.
5. Click save.

DASHBOARDS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	amount data	Kancharla Sneha Deepthi	30/12/2024, 3:33 pm	Kancharla Sneha Deepthi	30/12/2024, 4:13 pm
Created by Me	Enablement Dashboard Spring '24	Automated Process	29/12/2024, 12:09 pm	Automated Process	29/12/2024, 12:09 pm
Private Dashboards	Enablement Dashboard Summer '24	Automated Process	29/12/2024, 12:09 pm	Automated Process	29/12/2024, 12:09 pm
All Dashboards					

Create Dashboard

1. Go to the app >> click on the Dashboards tabs.
2. Give a Name and select the folder that was created, and click on create.
3. Select add component.
4. Select a Report and click on select.
5. Display as>> vertical bar chart
6. X-axis >> rice taken by shops
7. Y-axis >> sum of amount
8. Y-axis range >> automatic
9. Sort by >> rice taken by shops
10. Component theme >> dark.
11. Add the component
12. Again select add component with above same steps
13. display as donut chart
14. sort by >> sum of amount
15. title>>range of amount per day
16. component theme dark
17. Click add.
18. Click save and done.



12)APEX

Apex is a strongly typed, object-oriented programming language that allows developers to execute flow and transaction control statements on the Lightning platform server in conjunction with calls to the Lightning Platform API. Using syntax that looks like Java and acts like database stored procedures, Apex enables developers to add business logic to most system events, including button clicks, related record updates, and Visualforce pages. Apex code can be initiated by Web service requests and from triggers on objects.

Creating an Apex Class(ConsumerRecord)

1. Login to the Salesforce account and navigate to the gear account in the top right corner.
2. Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.
3. Then you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Class.
4. Enter the name of the class(ConsumerRecord) to create a new class file.

Code Snippet :

```
public class ConsumerRecord {
    public static void sendEmailNotification(List<consumer__c> con) {
        List<Messaging.SingleEmailMessage> emails = new
List<Messaging.SingleEmailMessage>();
        for (consumer__c c : con) {
            Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
```

```

// Ensure the email field exists and is not empty
if (c.email__c != null) {
    email.setToAddresses(new List<String>{c.email__c});
    email.setSubject('Welcome to our company');

    // Personalize email with customer's name and more dynamic content
    String body = 'Dear ' + (c.Name != null ? c.Name : 'Valued Customer') + '\n\n' +
        'Welcome to MY RICE! You have been seen as a valuable customer to us.
Please continue your journey with us,' +
        'while we strive to provide you with high-quality resources.\n\n' +
        'We are proud to associate with valuable customers like you, and we look
forward to collaborating with you by providing more exciting discounts and product offers.\n\n' +
        'So why take a step back? Take a leap of faith and shop with us more, while we
provide you with valuable products and offers!\n\n' +
        'Thank you for shopping with us! Here are some products brought by
customers who similarly bought items like yours:\n\n' +
        '[Product Recommendations Here]'; // Placeholder for product
recommendations

    email.setPlainTextBody(body);

    // Add the email to the list
    emails.add(email);
}

}

// Send all emails in one batch
if (!emails.isEmpty()) {
    Messaging.sendEmail(emails);
}
}
}

```

The screenshot shows the Oracle APEX developer interface. The top navigation bar includes File, Edit, Debug, Test, Workspace, Help, and a Go To button. Below the navigation is a toolbar with Code Coverage: None, API Version: 62, and a dropdown menu. The main area displays a code editor with Java code for sending emails. The code uses a List<consumer_c> to iterate over consumer records and create SingleEmailMessage objects for each. It personalizes the email body with the customer's name. The code editor has line numbers on the left and syntax highlighting. Below the code editor is a tabs section with ConsumerRecord.aplx and consumerTrigger.apxt. At the bottom, there is a Logs tab and a table for monitoring application operations.

```
1 public class ConsumerRecord {
2     public static void sendEmailNotification(List<consumer_c> con) {
3         List<Messaging.SingleEmailMessage> emails = new List<Messaging.SingleEmailMessage>();
4
5         for (consumer_c c : con) {
6             Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
7
8             // Ensure the email field exists and is not empty
9             if (c.email_c != null) {
10                 email.setToAddresses(new List<String>{c.email_c});
11                 email.setSubject('Welcome to our company');
12
13                 // Personalize email with customer's name and more dynamic content
14                 String body = 'Dear ' + (c.Name != null ? c.Name : 'Valued Customer') + ',\n\n' +
15             }
16         }
17     }
18 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size

Filter Click here to filter the log list

Creating an Apex Trigger

How to create a new trigger:

1. While still in the trailhead account, navigate to the gear icon in the top right corner.
 2. Click on developer console and you will be navigated to a new console window.
 3. Click on the File menu in the toolbar, and click on new Trigger.
 4. Enter the trigger name and the object to be triggered.

Trigger code:

```
trigger consumerTrigger on consumer_c (After insert) {  
    if(trigger.isAfter && trigger.isInsert) {  
        ConsumerRecord.sendEmailNotification(trigger.new);  
    }  
}
```

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < ▾

ConsumerRecord.apex consumerTrigger.apxt

Code Coverage: None ▾ API Version: 62

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

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time ▾	Status	Read	Size
------	-------------	-----------	--------	--------	------	------

Filter Click here to filter the log list

5. Testing and Validation

Unit Testing:

- Apex classes and triggers tested to ensure they handle edge cases and return accurate results.
- Achieved >90% code coverage to meet Salesforce standards.

User Interface Testing:

- Validated all forms and pages across different browsers and devices.
- Ensured consistent user experience and accurate data presentation.

End-to-End Testing:

- Simulated real-world scenarios, such as entering daily production data, generating reports, and managing inventory, to confirm seamless functionality.

The screenshot shows a Gmail inbox with 99+ unread messages. The 'Compose' button is visible. The 'Inbox' tab is selected, showing 718 messages. An email from 'Kancharla Sneha Deepthi' is open, with the subject 'Report results (range of amount per day)'. The email contains a link to 'OPEN IN SALESFORCE' and a summary table with the following data:

Total Records	Total rice price/kg	Total Amount Paid
10	60	33,000.00

Rice taken by shops ↑	consumer: consumer Name	Rice type	rice price/kg Sum	Mode of payment	Amount Paid Sum
15 (1 record)	consumers-005	basmati	60 UPI	900.00	900.00
18 (1 record)	consumers-007	basmati	60 Debit card	1,080.00	1,080.00
23 (1 record)	consumers-003	basmati	60 Net banking	1,380.00	1,380.00
33 (1 record)	consumers-006	basmati	60 Net banking	1,980.00	1,980.00
45 (1 record)	consumers-002	normal rice	60 Net banking	2,700.00	2,700.00
57 (1 record)	consumers-001	basmati	60 Cash	3,420.00	3,420.00
60 (1 record)	consumers-004	basmati	60 Cash	3,600.00	3,600.00
91 (1 record)	consumers-009	basmati	60 Debit card	5,460.00	5,460.00
97 (1 record)	consumers-010	normal rice	60 Net banking	5,820.00	5,820.00
111 (1 record)	consumers-008	normal rice	60 Credit card	6,660.00	6,660.00
Grand Total (10 records)				60	33,000.00

6. Key Scenarios Addressed by Salesforce in the Implementation Project

In the implementation of a project rice mill system on Salesforce, addressing key scenarios ensures the platform's capabilities are effectively leveraged. Here are some key scenarios that Salesforce can handle during the implementation:

1. Data Management and Integration:

- **Customer Data Management:** Salesforce can handle complex customer data management, including creating and managing customer records, tracking customer interactions, and handling consumer-specific information.
- **Integration with External Systems:** Salesforce can integrate with external systems such as inventory management or billing systems, ensuring smooth data flow between different platforms.
- **Data Migration:** Salesforce provides tools for data import and migration (using Data Loader or third-party tools), ensuring a smooth transition from legacy systems to Salesforce.

2. Sales Process Automation:

- **Lead and Opportunity Management:** Salesforce allows for efficient tracking and management of leads, opportunities, and sales pipelines, automating processes for follow-ups, approvals, and deal closure.
- **Order and Quote Management:** Salesforce can help automate the creation of orders and quotes, which is particularly useful in the rice mill industry for managing product orders, custom orders, and offers.
- **Workflow Automation:** Salesforce workflows and process builders can automate repetitive tasks, such as sending emails, updating records, or notifying teams when certain conditions are met.

3. Customer Service and Support:

- **Case Management:** Salesforce's Service Cloud can handle customer inquiries or complaints, manage cases, and track issue resolution, providing customers with faster support.
- **Knowledge Base:** With Salesforce, the rice mill can create a comprehensive knowledge base for customers and support agents, enabling self-service options for common queries or product information.
- **Omnichannel Support:** Salesforce can integrate various support channels, such as email, chat, and social media, to provide consistent support across platforms.

4. Salesforce Communities:

- **Customer and Partner Portals:** Salesforce Communities can be set up to provide customers with portals where they can track their orders, make payments, access offers, and interact with your company. Partners can also access relevant data to enhance collaboration.
- **Collaborative Spaces:** Communities allow internal teams, partners, and even customers to collaborate on product feedback, troubleshooting, or new feature ideas.

5. Analytics and Reporting:

- **Custom Reporting:** Salesforce enables users to create custom reports and dashboards, providing actionable insights on sales, customer activity, and inventory levels, critical for decision-making in the rice mill project.
- **Predictive Analytics:** With Salesforce Einstein Analytics, predictions can be made on future sales trends, customer behaviors, and more, helping businesses to anticipate demands and adjust their operations accordingly.

6. Inventory and Supply Chain Management:

- **Product Management:** Salesforce allows efficient management of products, including keeping track of inventory, managing suppliers, and handling product offers.
- **Order Fulfillment:** With integration to supply chain systems, Salesforce can assist in tracking order fulfillment, managing backorders, and updating inventory in real-time.
- **Product Recommendations:** With Salesforce's AI features, personalized product recommendations can be made to customers based on their previous purchase history.

7. Compliance and Security:

- **Data Security:** Salesforce offers robust security features, including user role management, field-level security, and audit trails to protect sensitive business data and ensure compliance.
- **Regulatory Compliance:** Salesforce can help ensure compliance with industry regulations by tracking changes in business processes, providing audit logs, and facilitating document management.
- **GDPR and Privacy Regulations:** Salesforce supports compliance with data privacy laws like GDPR, allowing businesses to manage customer consent, access, and deletion requests in compliance with privacy regulations.

8. Marketing and Campaign Management:

- **Email Marketing:** With Salesforce Marketing Cloud, businesses can set up and automate email marketing campaigns, segment customers, and track customer engagement.
- **Targeted Campaigns:** Personalized campaigns can be run based on customer segments, purchasing patterns, and more, enhancing customer engagement and sales opportunities.
- **Lead Nurturing:** Marketing automation in Salesforce can nurture leads through various stages of the sales funnel, ensuring continuous engagement.

9. Mobile and Field Services:

- **Mobile Access:** With Salesforce Mobile App, field sales representatives and service agents can access customer data, update orders, and manage cases from the field in real time.
- **Field Service Management:** Salesforce Field Service can help in scheduling and dispatching maintenance or service tasks for your products or customers, enhancing service delivery.

10. Customization and Scalability:

- **Custom Objects and Workflows:** Salesforce can be customized by creating custom objects, fields, and workflows that specifically fit the rice mill business processes, ensuring that all aspects of the business are tracked and managed effectively.
- **Scalability:** As your rice mill business grows, Salesforce can scale by adding new users, processes, or integrations without significant restructuring.

11. User Training and Adoption:

- **Onboarding and Training:** Salesforce offers built-in tools like Trailhead to help onboard and train new users effectively, ensuring they understand how to use the platform to its fullest potential.
- **Change Management:** Salesforce facilitates the change management process with tools to communicate updates and changes to users, ensuring smooth transitions and high user adoption rates.

By addressing these key scenarios, Salesforce helps streamline operations, improve customer experiences, and drive business growth in the rice mill project, while ensuring scalability and flexibility to meet future demands.

7. Conclusion

Summary of Achievements:

The CRM Application for the Wholesale Rice Mill has successfully tackled key business challenges by offering an integrated, automated, and intuitive solution. Key accomplishments include:

- **Automated workflows and reports** to save time and minimize errors.
- **Real-time dashboards and analytics** enhancing decision-making.
- **Streamlined data management** with rollup summaries and cross-object formula fields.
- **Role-based access controls** for secure and efficient data handling.

This project showcases how Salesforce CRM can be tailored to meet the specific needs of the rice mill industry, laying the foundation for scalable growth and operational excellence. It highlights the transformative power of technology in modernizing traditional business processes into efficient, data-driven operations.