

# **Project Title: A CRM Application for Wholesale Rice Mill**

## **1. Project Overview**

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

## **2. Objectives**

### **Business Goals:**

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

### **Specific Outcomes:**

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

## **3. Salesforce Key Features and Concepts Utilized**

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

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar is present. On the left, a sidebar shows 'Object Manager' with a sub-menu for 'RECENT RECORDS' listing 'consumer', 'rice mill', 'rice details', and 'supplier'. The main area displays a table of objects with columns: LABEL, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table lists various standard objects like Account, Activity, Address, and Asset, as well as custom objects like 'rice mill', 'rice details', and 'supplier'.

LABEL	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Standard Object			
Activity	Standard Object			
Address	Standard Object	Address		
Alternative Payment Method	Standard Object	AlternativePaymentMethod		
API Anomaly Event Store	Standard Object	ApiAnomalyEventStore		
Appointment Category	Standard Object	AppointmentCategory		
Appointment Invitation	Standard Object	AppointmentInvitation		
Appointment Invitee	Standard Object	AppointmentInvitee		
Appointment Topic Time Slot	Standard Object	AppointmentTopicTimeSlot		
Asset	Standard Object	Asset		
Asset Action	Standard Object	AssetAction		
Asset Action Source	Standard Object	AssetActionSource		
Asset Relationship	Standard Object	AssetRelationship		

**Tabs:**

The screenshot shows the Salesforce Tabs interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar is present. On the left, a sidebar shows 'User Interface' with a sub-menu for 'Rename Tabs and Labels'. The main area displays 'Custom Tabs' with a table of custom object tabs. The table has columns: Action, Label, Tab Style, and Description. It lists four custom object tabs: 'consumers', 'rice details', 'rice mills', and 'supplier'. Below the table, there are sections for 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs', each with a 'New' button and a 'What Is This?' link.

Action	Label	Tab Style	Description
Edit   Del	consumers	Truck	
Edit   Del	rice details	Ticket	
Edit   Del	rice mills	Credit card	
Edit   Del	supplier	Balls	

- 
- **Create a Lightning App:**

Setup

Home

Object Manager

Search Setup

Star

Grid

Refresh

Help

Notifications

User

app

Salesforce Mobile App

Data

Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Management Connected Apps

External Client Apps

External Client App Manager

OAuth Usage

Settings

Lightning Bolt

Flow Category

Lightning Bolt Solutions

Mobile Apps

Salesforce

Lightning Experience App Manager

New Lightning App

New Connected App

24 Items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

	App Name	Developer Name	Description	Last Modified Date	App Type	Visible i...	
8	Content	Content	Salesforce CRM Content	21/12/2024, 7:46 am	Classic	✓	
9	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	21/12/2024, 7:46 am	Lightning	✓	
10	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	21/12/2024, 7:46 am	Lightning	✓	
11	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	21/12/2024, 7:46 am	Lightning	✓	
12	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	21/12/2024, 7:46 am	Classic	✓	
13	MY RICE	MY_RICE		21/12/2024, 10:46 am	Lightning	✓	
14	Platform	Platform	The fundamental Lightning Platform	21/12/2024, 7:46 am	Classic		
15	Queue Management	QueueManagement	Create and manage queues for your business.	21/12/2024, 7:46 am	Lightning	✓	
16	Sales	Sales	The world's most popular sales force automation (SFA) solution	21/12/2024, 7:46 am	Classic		
17	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	21/12/2024, 7:46 am	Lightning	✓	
18	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	21/12/2024, 7:46 am	Lightning	✓	
19	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	21/12/2024, 7:46 am	Classic	✓	
20	Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	21/12/2024, 7:51 am	Lightning	✓	
21	Service	Service	Manage customer service with accounts, contacts, cases, and more	21/12/2024, 7:46 am	Classic	✓	
22	Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer ...	21/12/2024, 7:46 am	Lightning	✓	
23	Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application, an...	21/12/2024, 7:46 am	Classic		
24	Subscription Management	RevenueCloudConsole	Get started automating your revenue processes	21/12/2024, 7:46 am	Lightning	✓	

<https://myorgcolleageofengineering53-dev-ed.develop.lightning.force.com/lightning/setup/DataManagementMan...>

Fields:

Setup

Home

Object Manager

Search Setup

Star

Grid

Refresh

Help

Notifications

User

Setup > OBJECT MANAGER

rice mill

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
rice mill Name	Name	Auto Number		✓
rice price/kg	rice_price_kg_and_length_c	Number(5, 0)		
rice price/kg	rice_price_kg_c	Number(5, 0)		
rice taken	rice_taken_c	Roll-Up Summary (SUM consumer)		

mvgrcollegeofengineering53-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011Qy000002Tmj/FieldsAndRelationships/view

Setup Home Object Manager Search Setup

SETUP > OBJECT MANAGER  
**consumer**

Details  
**Fields & Relationships**  
15 Items. Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

email	email__c	Email	
First name	First_name__c	Text(50)	
Last Modified By	LastModifiedById	Lookup(User)	
Last name	Last_name__c	Text(50)	
Mode of payment	Mode_of_payment__c	Picklist	
Phone number	Phone_number__c	Phone	
rice mill name	rice_mill_name__c	Master-Detail(rice mill)	✓
Rice taken by shops	Rice_taken_by_shops__c	Number(5, 0)	
rice taken by shops in kgs	rice_taken_by_shops_in_kgs__c	Number(18, 0)	
rice taken in shops	rice_taken_in_shops__c	Number(18, 0)	
Rice type	Rice_type__c	Picklist	

## Page Layouts:

mvgrcollegeofengineering53-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011Qy000002Tmj/PageLayouts/00hQy00000BzkbIAB/view

Setup Home Object Manager Search Setup

SETUP > OBJECT MANAGER  
**consumer**

Details  
Fields & Relationships  
**Page Layouts**  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules  
Object Access  
Triggers

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

Quick Find Field Name

Fields  
Buttons  
Quick Actions  
Mobile & Lightning Actions  
Expanded Lookups  
Related Lists  
Report Charts

Section  
Blank Space  
Amount Paid  
consumer Name

Consumer Name	Last Modified By	rice mill name	Rice type
Created By	Last name	Rice taken by shops	
email	Mode of payment	rice taken by sho...	
Phone number		rice taken in shops	

Receipt details  
Mode of payment Sample Text  
Amount Paid 494.48

Information (Header visible on edit only)  
rice taken by shops in kgs 18,136  
rice taken in shops 97,209  
Consumer Name Sample Text

rice details  
Rice taken by shops 94,502  
Rice type Sample Text

Personal details  
First name Sample Text  
Last name Sample Text  
consumer Name GEN-2004-001234  
Phone number 1-415-555-1212  
email sarah.sample@company.com  
rice mill name Sample Text

System Information (Header visible on edit only)

Profiles:

Owner profile

Setup

Home

Object Manager

Search Setup

pro

Hyperforce Assistant

Users

Profiles

Data

Feature Settings

Data.com

Decision Explorer

Functions

Marketing

Sales

Products

Sales Processes

Sales Scheduler

Assignment Policies

owner

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Settings Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail

Nameowner

User LicenseSalesforce

Description

Created BySUKANYA JADA 2/12/2024, 12:29 pm

Modified BySUKANYA JADA 2/12/2024, 12:31 pm

Page Layouts

Standard Object Layouts

GlobalGlobal LayoutView Assignment |

Email ApplicationNot AssignedView Assignment |

Home Page LayoutDE DefaultView Assignment |

AccountAccount LayoutView Assignment |

Alternative Payment MethodAlternative Payment Method LayoutView Assignment |

Appointment InvitationAppointment Invitation LayoutView Assignment |

AssetAsset LayoutView Assignment |

Asset ActionAsset Action LayoutView Assignment |

Asset Action SourceAsset Action Source LayoutView Assignment |

Asset RelationshipAsset Relationship LayoutView Assignment |

Asset State PeriodAsset State Period LayoutView Assignment |

Assigned ResourceAssigned Resource LayoutView Assignment |

Associated LocationAssociated Location LayoutView Assignment |

InvoiceInvoice LayoutView Assignment |

Invoice LineInvoice Line LayoutView Assignment |

LeadLead LayoutView Assignment |

Legal EntityLegal Entity LayoutView Assignment |

LocationLocation LayoutView Assignment |

Location GroupLocation Group LayoutView Assignment |

Location Group AssignmentLocation Group Assignment LayoutView Assignment |

MacroMacro LayoutView Assignment |

Object MilestoneObject Milestone LayoutView Assignment |

Operating HoursOperating Hours LayoutView Assignment |

OpportunityOpportunity LayoutView Assignment |

Opportunity ProductOpportunity Product LayoutView Assignment |

OrderOrder LayoutView Assignment |

Employer profile:

Setup

Home

Object Manager

Search Setup

pro

Hyperforce Assistant

Users

Profiles

Data

Feature Settings

Data.com

Decision Explorer

Functions

Marketing

Sales

Products

Sales Processes

Sales Scheduler

Assignment Policies

employer

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Settings Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail

Nameemployer

User LicenseSalesforce Platform

Description

Created BySUKANYA JADA 2/12/2024, 12:32 pm

Modified BySUKANYA JADA 2/12/2024, 12:37 pm

Page Layouts

Standard Object Layouts

GlobalGlobal LayoutView Assignment |

Email ApplicationNot AssignedView Assignment |

Home Page DefaultHome Page Default LayoutView Assignment |

AccountAccount LayoutView Assignment |

Alternative Payment MethodAlternative Payment Method LayoutView Assignment |

Appointment InvitationAppointment Invitation LayoutView Assignment |

AssetAsset LayoutView Assignment |

Asset RelationshipAsset Relationship LayoutView Assignment |

Assigned ResourceAssigned Resource LayoutView Assignment |

Associated LocationAssociated Location LayoutView Assignment |

Async Operation LogAsync Operation Log LayoutView Assignment |

Authorization FormAuthorization Form LayoutView Assignment |

Authorization Form ConsentAuthorization Form Consent LayoutView Assignment |

Fulfillment Order Item TaxFulfillment Order Item Tax LayoutView Assignment |

Fulfillment Order ProductFulfillment Order Product LayoutView Assignment |

IdeaIdea LayoutView Assignment |

IndividualIndividual LayoutView Assignment |

InvoiceInvoice LayoutView Assignment |

Invoice LineInvoice Line LayoutView Assignment |

LeadLead LayoutView Assignment |

LocationLocation LayoutView Assignment |

Location GroupLocation Group LayoutView Assignment |

Location Group AssignmentLocation Group Assignment LayoutView Assignment |

Object MilestoneObject Milestone LayoutView Assignment |

Operating HoursOperating Hours LayoutView Assignment |

OrderOrder LayoutView Assignment |

Setup

Home

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Q pro

yperformance Assistant

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Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Decision Explorer

Business Process Type Definition

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

Product Schedules Settings

Product Settings

Sales Processes

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler Settings

Profiles

Profile Detail

work

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Learn IP Records | Enabled Area Class Access | Enabled Workflow Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Connected Process Access | Enabled Custom Metadata Type Access | Enabled Custom Settings Definition Access | Enabled Flow Access | Enabled Session Presence Status Access | Enabled Custom Permissions

Profile Detail

Name: work

User License: Salesforce Platform

Description: Created By: SUKANYA JADA 2/12/2024, 12:34 pm

Modified By: SUKANYA JADA 2/12/2024, 12:41 pm

Page Layouts

Standard Object Layouts

Global: Global Layout | View Assignment | Fulfillment Order Item Tax: Fulfillment Order Item Tax Layout | View Assignment | Email Application: Not Assigned | View Assignment | Fulfillment Order Product: Fulfillment Order Product Layout | View Assignment | Home Page Layout: Home Page Default | View Assignment | Idea: Ideas by Recent Type | View Assignment | Account: Account Layout | View Assignment | Individual: Individual Layout | View Assignment | Alternative Payment Method: Alternative Payment Method Layout | View Assignment | Invoice: Invoice Layout | View Assignment | Appointment Invitation: Appointment Invitation Layout | View Assignment | Invoice Line: Invoice Line Layout | View Assignment | Asset: Asset Layout | View Assignment | Lead: Lead Layout | View Assignment | Asset Relationship: Asset Relationship Layout | View Assignment | Location: Location Layout | View Assignment | Assigned Resource: Assigned Resource Layout | View Assignment | Location Group: Location Group Layout | View Assignment | Associated Location: Associated Location Layout | View Assignment | Location Group Assignment: Location Group Assignment Layout | View Assignment | Async Operation Log: Async Operation Log Layout | View Assignment | Object Milestone: Object Milestone Layout | View Assignment | Authentication Form: Authentication Form Layout | View Assignment | Operating Hours: Operating Hours Layout | View Assignment | Authentication Form Consent: Authentication Form Consent Layout | View Assignment | Order: Order Layout | View Assignment

## Roles:

Setup

Home

Object Manager

Search Setup

Q roles

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

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

Collapsible All Expand All

MVGR COLLEGE OF ENGINEERING

Add Role

CEO Edit | Del | Assign

Add Role

CEO Edit | Del | Assign

Add Role

COO Edit | Del | Assign

Add Role

owner Edit | Del | Assign

Add Role

SVP Customer Service & Support Edit | Del | Assign

Add Role

SVP Human Resources Edit | Del | Assign

Add Role

SVP Sales & Marketing Edit | Del | Assign

Add Role

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

## Users:

mvgrcollegeofengineering53-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005Qy00000B3YBt%3Fnoredirect%3D1%26isUserEntityOverride%3D1

Setup Home Object Manager

Q user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User

Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Custom Labels

Density Settings

Global Actions

Publisher Layouts

SETUP Users

User vicky y

Permission Set Assignments | Permission Set Assignments Activation Required | Permission Set Group Assignments | Permission Set License Assignments | Personal Groups | Public Group Memberships | Queue Memberships | Teams | Members in the Role Hierarchy | Default Apps | Third-Party Account Links | Installed Mobile Apps | Authentication Settings for External Systems | Login History | User Provisioning Accounts

User Detail

Name vicky y

Alias vy

Email sskanrajad@nmail.com Verify

Username vicky@mvgr-cfc

Nickname vicky

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

App Registration: Salesforce Authenticator

Security Key (OTP or WebAuthn)

Lightning Login

Temporary Verification Code (Expires in 1 to 34 Hours) Generate

Role custom

User License Salesforce

Profile custom

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WOC User

Mobile Push Registrations

Data.com User Type

Accessibility Mode (Classic Only)

Debug Mode

High-Contrast Palette on Charts

Load Lightning Pages While Scrolling

Salesforce CRM Content User

Receive Salesforce CRM Content Email Alerts

Receive Salesforce CRM Content Alerts as Daily Digest

Make Setup My Default Landing Page

Allow Forecasting

No MRU Updates

Call Center

Phone

Extension

Fax

mvgrcollegeofengineering53-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005Qy00000B3YD%3Fnoredirect%3D1%26isUserEntityOverride%3D1

Setup Home Object Manager

Q user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User

Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Custom Labels

Density Settings

Global Actions

Publisher Layouts

SETUP Users

User ram ram

Permission Set Assignments | Permission Set Assignments Activation Required | Permission Set Group Assignments | Permission Set License Assignments | Personal Groups | Public Group Memberships | Queue Memberships | Teams | Members in the Role Hierarchy | Default Apps | Third-Party Account Links | Installed Mobile Apps | Authentication Settings for External Systems | Login History | User Provisioning Accounts

User Detail

Name ram ram

Alias ram

Email sskanrajad@nmail.com Verify

Username ram@mvgr-ram

Nickname ram

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

App Registration: Salesforce Authenticator

Security Key (OTP or WebAuthn)

Lightning Login

Temporary Verification Code (Expires in 1 to 34 Hours) Generate

Role standard

User License Salesforce Platform

Profile Standard Platform User

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WOC User

Mobile Push Registrations

Data.com User Type

Accessibility Mode (Classic Only)

Debug Mode

High-Contrast Palette on Charts

Load Lightning Pages While Scrolling

Salesforce CRM Content User

Receive Salesforce CRM Content Email Alerts

Receive Salesforce CRM Content Alerts as Daily Digest

Make Setup My Default Landing Page

Allow Forecasting

No MRU Updates

Call Center

Phone

Extension

Fax

sharing settings:

Sharing Settings

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

Shipping Carrier Method	Public Read Only
Shipping Configuration Set	Public Read Only
Streaming Channel	Public Read/Write
Tableau Host Mapping	Public Read Only
User Provisioning Request	Private
Waitlist	Private
Web Cart Document	Private
Work Order	Private
Work Plan	Private
Work Plan Template	Private
Work Step Template	Private
Work Type	Private
Work Type Group	Public Read/Write
consumer	Controlled by Parent
rice details	Controlled by Parent
rice mill	Public Read Only
supplier	Public Read Only

Other Settings

Manager Groups

☐ ⓘ

Secure guest user record access

☒ ⓘ

Require permission to view record names in lookup fields

☐ ⓘ

Reports:

mvgrcollegeofengineering53-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

72°F  
Partly cloudy

Search

ENG  
IN

8  
1/

MY RICE

supplier

rice mills

consumers

rice details

Dashboards

Reports

Search...

Star

Share

Help

Settings

Notifications

Profile

Reports

Recent

2 items

Search recent reports...

New Report

New Folder

Settings

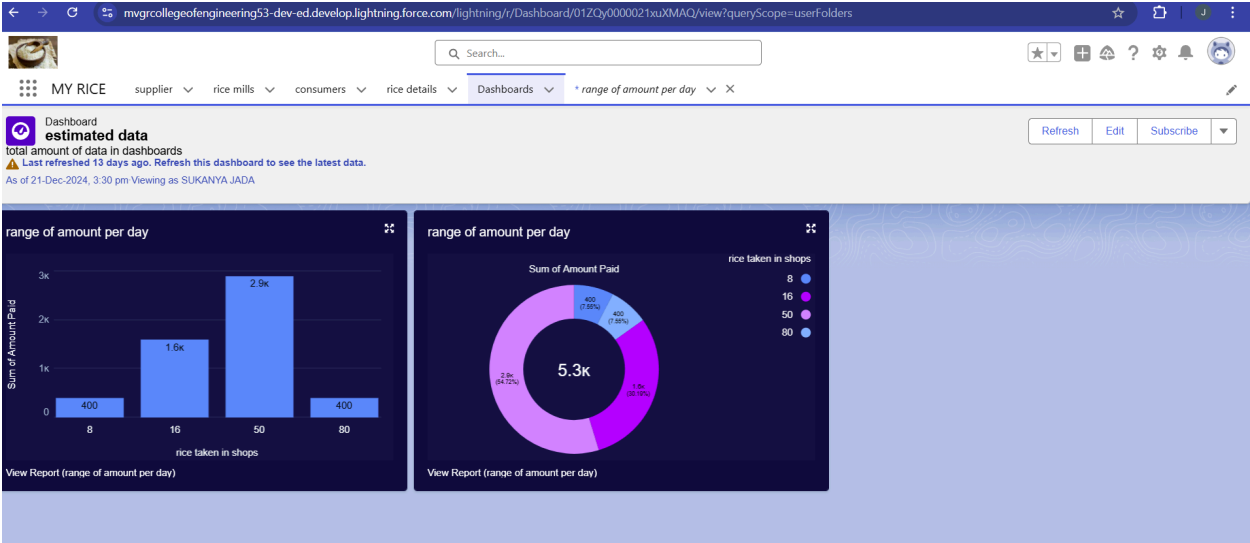
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed	
Recent	range of amount per day		Private Reports	SUKANYA JADA	21/12/2024, 1:16 pm	✓	⌵
Created by Me	new rice mills		new rice amount	SUKANYA JADA	21/12/2024, 2:28 pm		⌵
Private Reports							
Public Reports							
All Reports							
FOLDERS							
All Folders							
Created by Me							
Shared with Me							
FAVORITES							
All Favorites							



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

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

Dashboards:



Apex:

```
1 class ConsumerRecord {
2     public static void sendEmailNotification(List<Consumer__c> com){
3         for(Consumer__c c: com){
4             Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
5             email.setToAddresses(new List<String>{c.email_c});
6             email.setSubject('Welcome to our company');
7             email.setPlainTextBody('Dear ' + c.name + ', welcome to MY RICE! You have been seen as a valuable customer to us. Please continue your journey with us, while we try to provide you with good quality resources.' + '\n' +
8                 'To any taking a step back, take a leap of faith and shop with us more, while we provide with the valuable products and offers.' + '\n' + '\n' +
9                 'Thankyou for buying ' + c.rice_mills + ' here are some of the products that are brought by the customers who similarly bought products like this.' + '\n' + '\n');
10            Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
11        }
12    }
13 }
14
15
16 }
```

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

4. Detailed Steps to Solution Design

1. Requirement Gathering:

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

## 2. Data Model Design:

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

## 3. UI Design:

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

## 4. Business Logic Implementation:

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

## 5. Automation:

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

## 6. Reports and Dashboards:

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

# 5. Testing and Validation

## • Unit Testing:

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

## • User Interface Testing:

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

## • Integration Testing:

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

## • User Acceptance Testing (UAT):

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

# 6. Key Scenarios Addressed by Salesforce in the Implementation Project

- Efficient tracking of bulk orders and their statuses.
- Maintaining accurate inventory levels with automated updates.
- Generating detailed sales and customer interaction reports.
- Automating repetitive tasks, such as follow-ups and confirmation emails.

- Enabling mobile access for field sales teams.
- Providing a 360-degree view of customer information to improve service quality.

## **7. Conclusion**

### **Summary of Achievements:**

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

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