## A CRM APPLICATION FOR WHOLESALE RICE MILL

#### **CERTIFICATE:**









#### CERTIFICATE OF COMPLETION

July 02, 2024

# Sai SumanthOmmu

# Salesforce Developer Virtual Internship

During the 8 Weeks period of Virtual Internship (May-June 2024), Sai SumanthOmmu has completed the following Salesforce Trailhead modules

Salesforce Fundamentals
Organizational Setup
Relationship & Process Automation
Types Of Flows & Security
Apex, Testing & Debugging
VS Code Setup & CLI Setup
Lightning Web Components (LWC) & API

Super Badge - Apex Specialist Super Badge - Process Automation Specialist Super Badge - Developer Super Set

Certificate ID: SISFVIPAD2024-2016 | Verify this certificate @ https://skillwallet.smartinternz.com/internships/salesforce\_certificates/95192c98732387165bf8e396c0f2dad2

Shri Buddha Chandrasekei
Chief Coordinating Officer(CCO),
NEAT Cell-AICTE

Amauu

Mr Amarender Katkam Founder & CEO, SmartBridge & SmartInternz

<u>Description:</u> The CRM Application for Wholesale Rice Mill is a comprehensive solution designed to streamline and simplify the daily operations of a rice mill factory. It leverages the power of Salesforce's customerrelationship management (CRM) platform to enhance customer experiences, optimize store operations, and improve overall efficiency. This user-friendly and feature-rich application addresses the specific needs of a rice mill, ensuring comprehensive management and reporting.

## **Features**

1. **Custom Objects**: Supplier,Rice Mill, Consumer, and Rice Detailsobjects to managespecific data.

- 2. **Fields and Relationships**: Tailored fields and relationships to connect andorganize data effectively.
- 3. Roll-Up Summary Fields: Aggregates data from related records for betterin sights.
- 4. **Formula Fields**: Automatescalculations and data processing within records.
- 5. Validation Rules: Ensures data integrityby enforcing businessrules.
- 6. **Page Layouts**: Custom layouts for the Consumerobject to improvedataentry and viewing.
- 7. **Profiles and Permissions :** Custom profiles for Owner, Employer, and Worker to control accessand actions.
- 8. **Reports and Dashboards:** Generate daily reportson rice production, sales, and types of rice, providing key insights to owners.

## **Benefits**

- 9. **Enhanced Efficiency**: Streamlinedoperations reduce manualprocesses and save time.
- 10. **Improved Data Accuracy:** Automated calculations and validation rulesensure reliabledata.
- 11. **Better Decision-Making**: Comprehensive reports and dashboards offervaluable insights.
- **12. Customer Satisfaction :** Improved management of customer interactions enhances experiences.
- 13. **OptimizedOperations**: Detailed tracking and reporting help identify areasfor improvement.

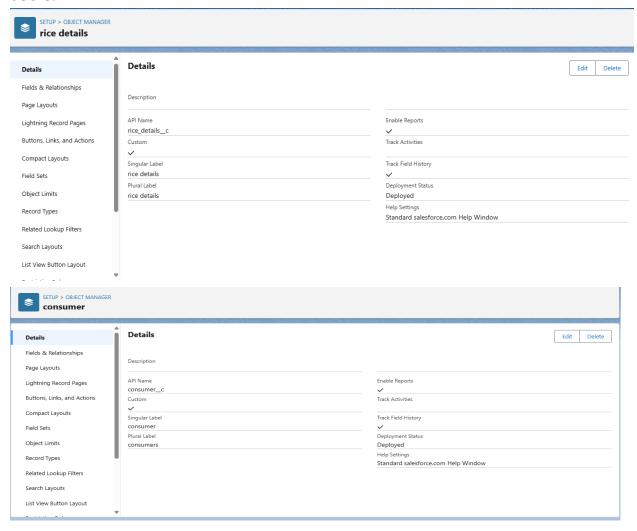
## **SCREENSHOTS**

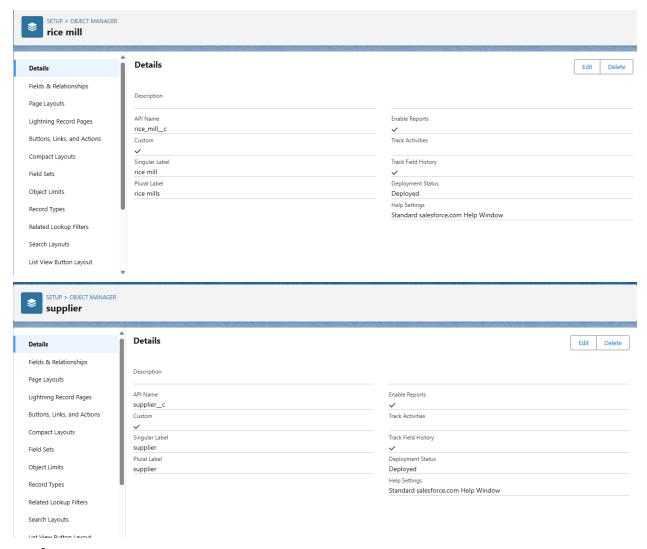
## What Is an Object?

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.





# **Tabs**

What is Tab: A tab is like a user interface that is used to build records for objects and to view the recordsinthe objects.

# Types of Tabs:

#### **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.

#### Web Tabs

Web Tabs are customtabs that displayweb content or applications embeddedin 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.

#### **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.

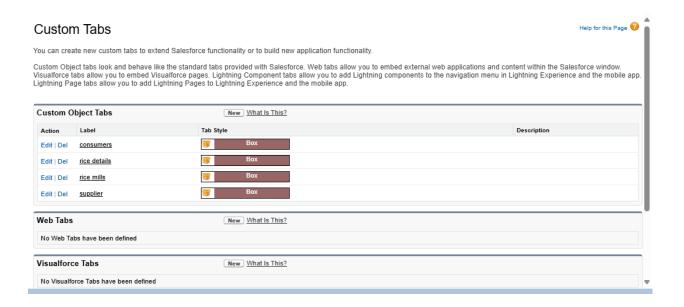
### **Lightning ComponentTabs**

Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobileapp.

## **Lightning Page Tabs**

Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

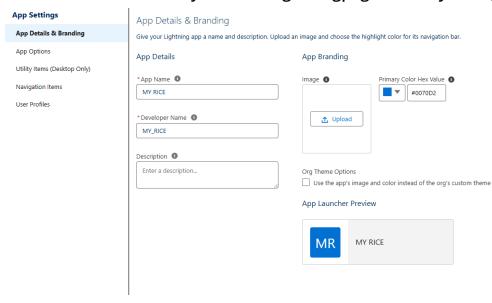
Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs.

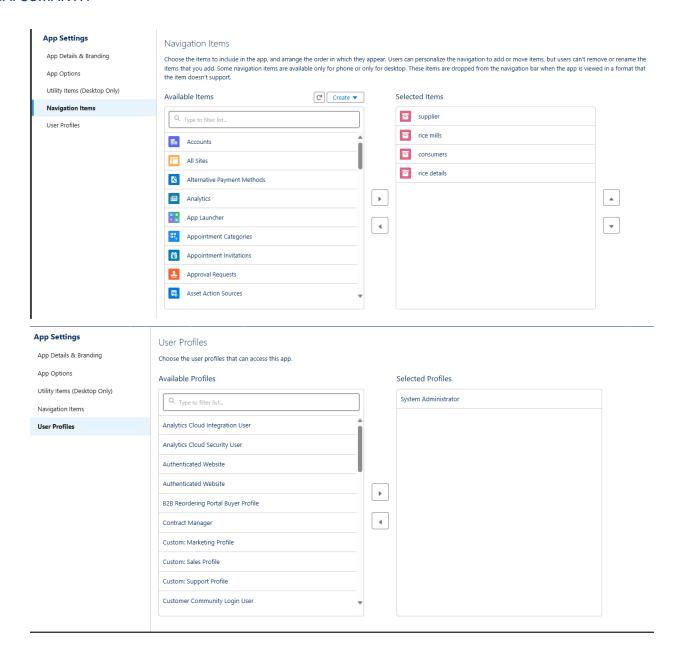


## The Lightning App

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 Lightningpage tabs in your Lightningapp.





# **Fields**

When we talk about Salesforce, Fieldsrepresent the data stored in the columnsof 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 recordsbecome simpler and quicker.

### **Types of Fields**

- Standard Fields
- Custom Fields

#### **Standard Fields:**

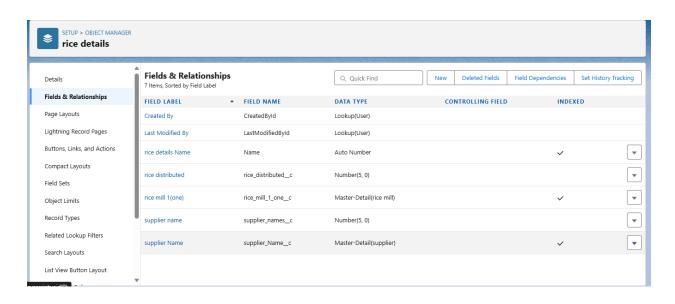
As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application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

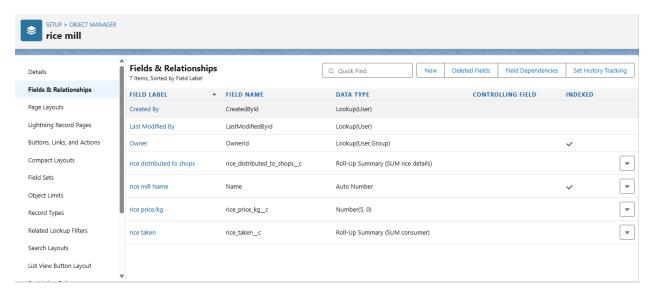
- 1. Created By
- 2. Owner
- 3. Last Modified
- 4. Field Made During object Creation

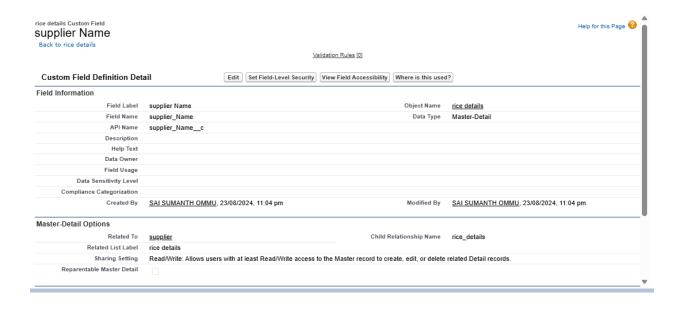
#### **Custom Fields:**

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.







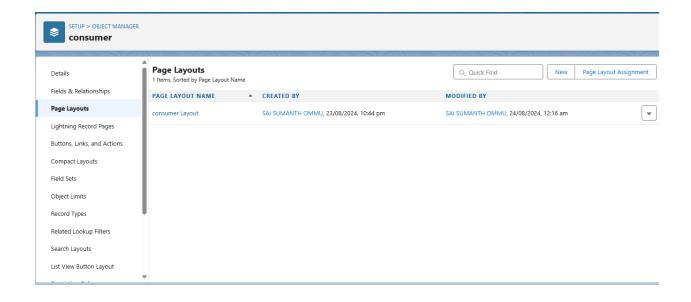
#### consumer Validation Rule

Back to consumer



# **Page Layouts**

PageLayout 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' detailand edit pages.



## **Profiles**

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls "Objectpermissions, 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 profilesby the user's job function. For example System Administrator, Developer, Sales

Representative:

Types of profiles in salesforce

Standard profiles:

## Bydefault salesforce provides below standard profiles.

- 1. Contract Manager
- 2. Read Only
- 3. Marketing User
- 4. Solutions Manager
- 5. Standard User
- 6. System Administrator.

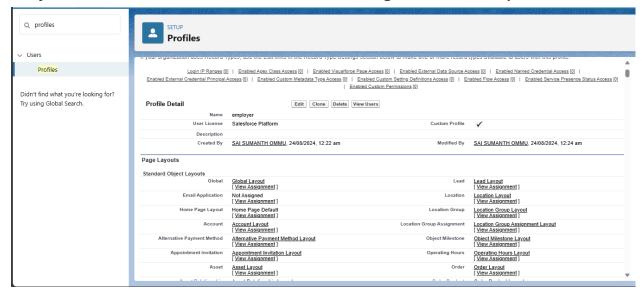
#### Wecannot deleted standardones

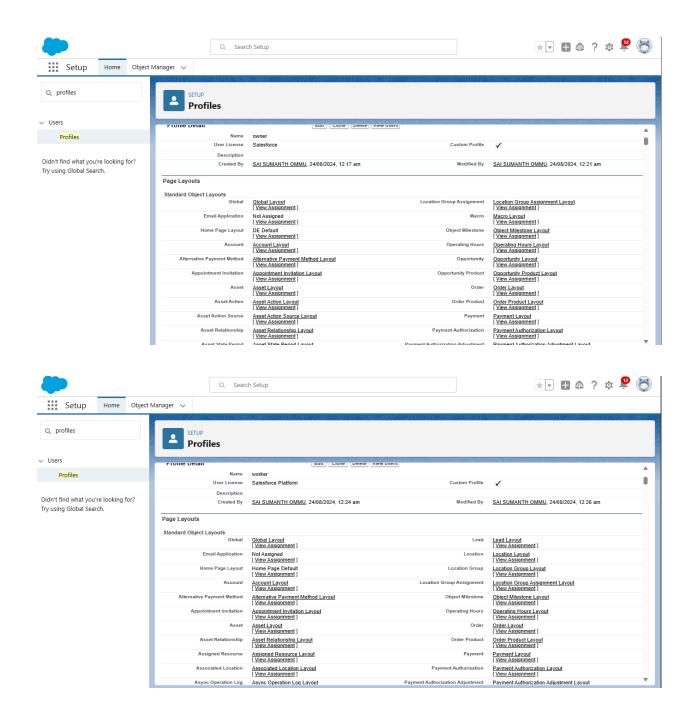
Each of these standardones includes a default set of permissions for all of the standardobjects available on the platform.

#### **Custom Profiles:**

Custom ones defined by us.

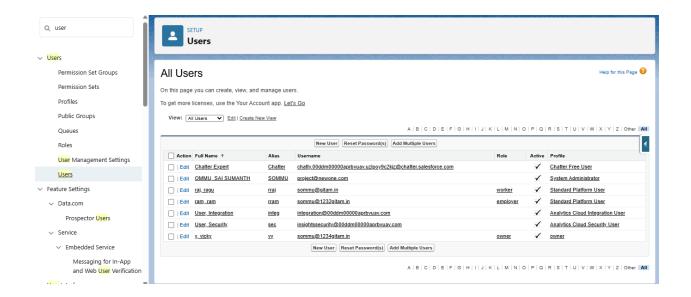
They can be deleted if there are no users assigned with that particular one





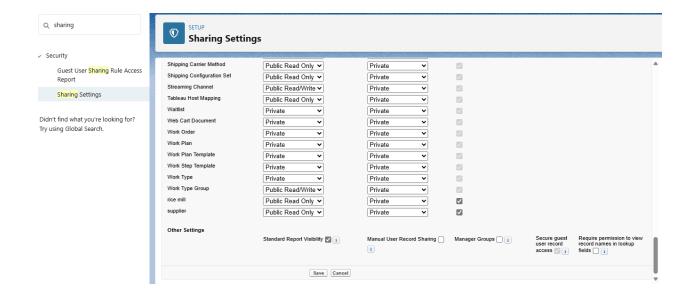
## **Users**

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.



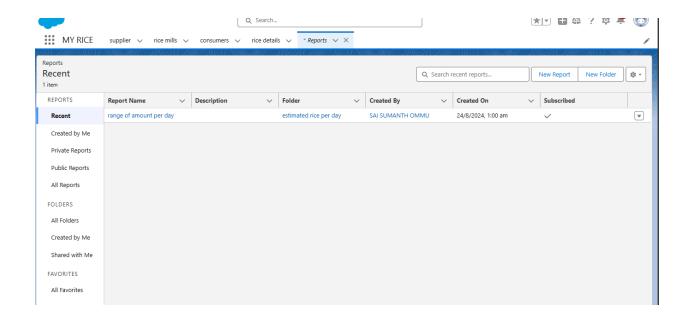
## **Permission Sets**

A permission set is a collection of settingsand 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.



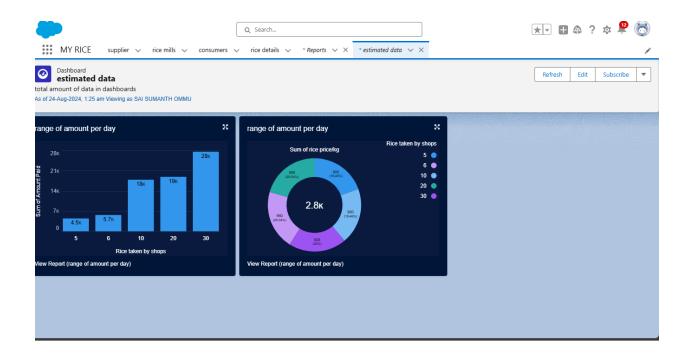
# **Reports**

A collection of data that meets specific criteria, allowing users to analyze and make informeddecisions. In this project, reports are generated dailyto track rice production, sales, and types of rice.



# **Dashboards**

A visual representation of key metrics and trends from reports, providing a quick overview of the rice mill's performance. Dashboards in this project help owners and managers monitoroperations at a glance.



This CRM application empowers rice mill owners with the tools and insights needed to manage their businesseffectively, ensuring continuous improvement and growth.

## **APEX**

Apexis a strongly typed, object-oriented programming language that allows

developers to execute flow and transaction control statements on the Lightningplatform server in conjunction with calls to the LightningPlatform? API. Using

syntax that looks like Java and acts like database stored procedures, Apex

enables developers to add businesslogic to most system events, including button clicks, related record updates, and Visualforce pages. Apex code can be initiated by Web servicerequests and from triggers on objects. It is as similaras java i.e, it also supports OOP( Object orientedprogramming) like Classes, objects, methods.

### **Creating Classes:**

Apexclasses are modeledon their counterparts in Java. You'lldefine, instantiate, and extend classes, and you'll work with interfaces, Apex class versions, properties, and other related class concepts.

#### 1. Class:

As in Java, you can createclasses in Apex.A class is a templateor blueprint from which objects are created. An object is an instance of a class.

## 2. Object

Object is an instance of a class, where it can accessall the properties that are present in a classile, variables and methods.

### **APEX (CONSUMER CLASS)**

```
1 class ConsumerRecord {
2         public static void sendEmailNotification
      (List<consumer__c> con) {
```

```
3
          for(consumer__c c:con)
4
          {
5
                    Messaging.SingleEmailMessage email = new
  Messaging.SingleEmailMessage();
6
                                   email.setToAddresses( new
  List<String>{c.email__c});
                 email.setSubject('Welcome to our company');
7
                       email.setPlainTextBody('Dear ' + ' '+
8
  ',\n\nWelcome 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'+
9
                                              "We are proud to
  associate with valuable customers like you and we look
  forward to collaborating with you by providing more and more
  exciting discounts or even product offers too.' + '\n'
10
                                             +'So why taking a
  step back, take a leap of faith and shop with us more, while
  we
        provide with
                          the valuable
                                              products
                                                          and
  offers'+'\n'+'\n'+'\n'+
11
                                                 'Thankyou for
  buying '+ '' +'Here are some of the products that are
  brought by the customers who similarly bought products like
  this'+'n';
```

```
Messaging.sendEmail(new
  List<Messaging.SingleEmailMessage>{email});

13
14  }
15 }
16}
```

#### **APEX TRIGGER**

```
1
2 trigger consumerTrigger on consumer__c (After insert) {
3    if(trigger.isAfter && trigger.isInsert) {
4        ConsumerRecord.sendEmailNotification(trigger.new);
5    }
6 }
```