

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:

This screenshot shows the Salesforce Setup interface for the 'supplier' object. The browser address bar indicates the URL: `projectcom-a6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000002WEJd/Details/view`. The page header includes a search bar labeled 'Search Setup' and navigation tabs for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'supplier' and features a left-hand navigation menu with options like 'Fields & Relationships', 'Page Layouts', and 'Object Limits'. The 'Details' section on the right contains the following information:


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

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.








This screenshot shows the Salesforce Setup interface for the 'rice mill' object. The browser address bar indicates the URL: `projectcom-a6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000002WEJd/Details/view`. The page header includes a search bar labeled 'Search Setup' and navigation tabs for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'rice mill' and features a left-hand navigation menu with options like 'Fields & Relationships', 'Page Layouts', and 'Object Limits'. The 'Details' section on the right contains the following information:

Details	
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 for 'Edit' and 'Delete' are located in the top right corner of the details section.



Search Setup



SetupHomeObject Manager

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

Details

Description

API Name
consumer__c

Custom
✓

Singular Label
consumer

Plural Label
consumers

Enable Reports
✓


Track Activities

Track Field History
✓








Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

EditDelete



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER
rice details

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

Details

Description

API Name
rice_details__c

Custom
✓

Singular Label
rice details

Plural Label
rice details

Enable Reports
✓

Track Activities

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

EditDelete

TABS:

Setup

Home

Object Manager

tabs

Renaming Tabs and Labels

Tabs

Didn't find what you're looking for?

Try using Global Search.

SETUP

Tabs

Custom Tabs

Help for this Page

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New

What Is This?

Action	Label	Tab Style	Description
Edit Del	consumers	Box	
Edit Del	rice details	Box	
Edit Del	rice mills	Box	
Edit Del	suppliers	Box	

Web Tabs

New

What Is This?

No Web Tabs have been defined

Visualforce Tabs

New

What Is This?

No Visualforce Tabs have been defined

CREATE A LIGHTNING APP:

Setup

Home

Object Manager

app manager

Apps

App Manager

External Client Apps

External Client App Manager

Didn't find what you're looking for?

Try using Global Search.

SETUP

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 D...

App ...

Visi...

12	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	25/12/2024, 6:13 pm	Classic	✓	
13	MY RICE	MY_RICE		25/12/2024, 8:32 pm	Lightning	✓	
14	Platform	Platform	The fundamental Lightning Platform	25/12/2024, 6:13 pm	Classic		
15	Queue Management	QueueManagement	Create and manage queues for your business.	25/12/2024, 6:13 pm	Lightning	✓	
16	Sales	Sales	The world's most popular sales force automation (SFA) solution	25/12/2024, 6:13 pm	Classic		
17	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	25/12/2024, 6:13 pm	Lightning	✓	
18	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	25/12/2024, 6:13 pm	Lightning	✓	
19	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	25/12/2024, 6:13 pm	Classic	✓	
20	Salesforce Scheduler S...	LightningScheduler	Set up personalized appointment scheduling.	25/12/2024, 6:16 pm	Lightning	✓	
21	Service	Service	Manage customer service with accounts, contacts, cases, and more	25/12/2024, 6:13 pm	Classic	✓	
22	Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across custo...	25/12/2024, 6:13 pm	Lightning	✓	
23	Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com applicatio...	25/12/2024, 6:13 pm	Classic		
24	Subscription Managem...	RevenueCloudConsole	Get started automating your revenue processes	25/12/2024, 6:13 pm	Lightning	✓	

FIELDS:

Setup

Home

Object Manager

Search Setup

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⚙️

12

👤

SETUP > OBJECT MANAGER

rice details

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

Fields & Relationships

6 Items, Sorted by Field Label

Q 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)			
rice details Name	Name	Auto Number		✓	▼
rice distributed	rice_distributed__c	Number(5, 0)			▼
rice mill 1(one)	rice_mill_1_one__c	Master-Detail(rice mill)		✓	▼
supplier Name	supplier_Name__c	Master-Detail(supplier)		✓	▼

Setup

Home

Object Manager

Search Setup

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12

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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

Fields & Relationships

7 Items, Sorted by Field Label

Q 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 distributed to shops	rice_distributed_to_shops__c	Roll-Up Summary (SUM rice details)			▼
rice mill Name	Name	Auto Number		✓	▼
rice price/kg	rice_price_kg__c	Number(5, 0)			▼
rice taken	rice_taken__c	Roll-Up Summary (SUM consumer)			▼

Setup

Home

Object Manager

Search Setup

★

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⚙️

12

👤

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

Flow Triggers

Validation Rules

Conditional Field Formatting

Fields & Relationships

15 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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(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:

Setup

Home

Object Manager

Search Setup

Star

Grid

Print

Help

12

Avatar

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

Page Layouts

1 Items, Sorted by Page Layout Name

Quick Find

New

Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
consumer Layout	VARSHINI NERALLA, 25/12/2024, 7:04 pm	VARSHINI NERALLA, 25/12/2024, 10:29 pm

OWNER:

Setup

Home

Object Manager

Search Setup

Star

Grid

Print

Help

12

Avatar

profiles

Profiles

Profiles

owner

Profile Detail

Name

owner

Edit

Clone

Delete

View Users

User License

Salesforce

Custom Profile

✓

Description

Modified By

VARSHINI NERALLA, 27/12/2024, 2:52 pm

Created By

VARSHINI NERALLA, 27/12/2024, 2:51 pm

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Invoice	Invoice Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Invoice Line	Invoice Line Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]	Lead	Lead Layout [View Assignment]
Account	Account Layout [View Assignment]	Legal Entity	Legal Entity Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Location	Location Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Location Group	Location Group Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Asset Action	Asset Action Layout [View Assignment]	Macro	Macro Layout [View Assignment]
Asset Action Source	Asset Action Source Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Asset Relationship	Asset Relationship Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Asset State Period	Asset State Period Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Assigned Resource	Assigned Resource Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]

EMPLOYER:

Setup

Home

Object Manager

profiles

Users

Profiles

Didn't find what you're looking for?

Try using Global Search.

SETUP

Profiles

Profiles

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

Edit

Clone

Delete

View Users

Name

employer

User License

Salesforce Platform

Custom Profile

✓

Description

Created By

YASSHINI NERALLA, 27/12/2024, 2:54 pm

Modified By

YASSHINI NERALLA, 27/12/2024, 2:55 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	Varies by Record Type (View Assignment)
Account	Account Layout (View Assignment)	Individual	Individual Layout (View Assignment)
Alternative Payment Method	Alternative Payment Method Layout (View Assignment)	Invoice	Invoice Layout (View Assignment)
Appointment Invitation	Appointment Invitation Layout (View Assignment)	Invoice Line	Invoice Line Layout (View Assignment)
Asset	Asset Layout (View Assignment)	Lead	Lead Layout (View Assignment)
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)

WORKER :

Setup

Home

Object Manager

profiles

Users

Profiles

Didn't find what you're looking for?

Try using Global Search.

SETUP

Profiles

Profiles

worker

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

Edit

Clone

Delete

View Users

Name

worker

User License

Salesforce Platform

Custom Profile

✓

Description

Created By

YASSHINI NERALLA, 27/12/2024, 2:56 pm

Modified By

YASSHINI NERALLA, 27/12/2024, 2:57 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	Varies by Record Type (View Assignment)
Account	Account Layout (View Assignment)	Individual	Individual Layout (View Assignment)
Alternative Payment Method	Alternative Payment Method Layout (View Assignment)	Invoice	Invoice Layout (View Assignment)
Appointment Invitation	Appointment Invitation Layout (View Assignment)	Invoice Line	Invoice Line Layout (View Assignment)
Asset	Asset Layout (View Assignment)	Lead	Lead Layout (View Assignment)
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)

ROLE & ROLE Hierarchy:

OWNER ROLE:

The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. The left sidebar contains a search bar with 'roles' and a list of navigation items: Users, Roles (selected), Feature Settings, Sales (with sub-items 'Contact Roles on Contracts' and 'Contact Roles on Opportunities'), Service (with sub-items 'Case Teams' and 'Case Team Roles'), and 'Contact Roles on Cases'. The main content area is titled 'Creating the Role Hierarchy' and includes a 'Show in tree view' button. The role hierarchy is displayed as a tree structure starting with 'Salesforce' at the top, followed by 'CEO', 'CFO', 'COO', 'owner', 'employee', 'worker', 'SVP_Customer Service & Support', 'Customer Support International', 'Customer Support North America', 'Installation & Repair Services', 'SVP_Human Resources', 'SVP_Sales & Marketing', 'VP_International Sales', 'VP_Marketing', and 'Marketing Team'. Each role in the hierarchy has an 'Add Role' link next to it.

EMPLOYER:

This screenshot is identical to the one above, showing the Salesforce Setup - Roles page. The role hierarchy is the same, but the 'owner' role is highlighted in the tree view, indicating it is the selected role for the current view.

USERS:

- 1.VICKY
- 2.RAM
- 3.RAGU RAJ

projectcom-a6-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers?pageaddress=%2F005Qy00000BDU01%3Fnoredirect%3D1%26isUserEntityOverride%3D1

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

User Profile Help for this Page

User vicky y

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

User Detail

Edit Sharing Reset Password Freeze View Summary

Name	vicky y	Role	OWNER
Alias	vy	User License	Salesforce
Email	nerallavarshini@gmail.com [Verify]	Profile	OWNER
Username	nerallavarshini@exam1.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	MAHARAJ VJAYARAM GAJAPATHI RAJ COLLEGE OF ENGINEERING, CHINTALAVALASA VIZIANAGARAM 535005 Andhra Pradesh India	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
Delegated Approver		Data.com User Type	

projectcom-a6-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers?pageaddress=%2F005Qy00000BDU01%3Fnoredirect%3D1%26isUserEntityOverride%3D1

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

User Profile Help for this Page

User ram ram

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

User Detail

Edit Sharing Reset Password Freeze View Summary

Name	ram ram	Role	Standard User
Alias	rram	User License	Salesforce Platform
Email	nerallavarshini@gmail.com [Verify]	Profile	Standard Platform User
Username	nerallavarshini@exam2.com	Active	<input checked="" type="checkbox"/>
Nickname	ramu	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	MAHARAJ VJAYARAM GAJAPATHI RAJ COLLEGE OF ENGINEERING, CHINTALAVALASA VIZIANAGARAM 535005 Andhra Pradesh India	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
Delegated Approver		Data.com User Type	
Manager		Accessibility Mode (Classic Only)	
Receive Approval Request Emails	Only if I am an approver	Debug Mode	
Federation ID		High-Contrast Palette on Charts	
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling	
App Registration: Salesforce Authenticator		Salesforce CRM Content User	
Security Key (G2F or WebAuthn)		Receive Salesforce CRM Content Email Alerts	
Lightning Login		Receive Salesforce CRM Content Alerts as Daily Digest	
Temporary Verification Code (Expires in 1 to 24 Hours)	[Generate]	Make Setup My Default Landing Page	
		Allow Forecasting	

projectcom-a6-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005Qy00008DV9%3FnoRedirect%3D1%26isUserEntityOverride%3D1

Setup Home Object Manager

Search Setup

Users

User Detail

Name: ragu raj

Role: woclar

Alias: rraj

User License: Salesforce Platform

Email: nerallavarshini@gmail.com

Profile: Standard Platform User

Username: nerallavarshini@exam3.com

Active: ☒

Nickname: ramraju

Marketing User: ☐

Title: ☐

Offline User: ☐

Company: ☐

Knowledge User: ☐

Department: ☐

Flow User: ☐

Division: ☐

Service Cloud User: ☐

Address: MAHARAJ VILVARAM GAJAPATHI RAJ COLLEGE OF ENGINEERING, CHINTALVALASA, VIJAYAGARAM 535005, Andhra Pradesh, India

Site.com Contributor User: ☐

Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)

Site.com Publisher User: ☐

Locale: English (India)

WDC User: ☐

Language: English

Mobile Push Registrations: View

Delegated Approver: ☐

Data.com User Type: ☐

Manager: ☐

Accessibility Mode (Classic Only): ☐

Receive Approval Request Emails: Only if I am an approver

Debug Mode: ☐

Federation ID: ☐

High-Contrast Palette on Charts: ☐

Permission sets:

Setup Home Object Manager

Search Setup

Sharing Settings

Work Order: Private

Work Plan: Private

Work Plan Template: Private

Work Step Template: Private

Work Type: Private

Work Type Group: Public ReadWrite

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: ☐

Sharing Rules

Lead Sharing Rules

Account Sharing Rules

Report:

MY RICE

suppliers

rice mills

consumers

rice details

Reports

Search...

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⚙️

🔔

👤

Reports

Recent

1 item

Q Search recent reports...

New Report

New Folder

⚙️

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed	
Recent	range of amount per day		estimated rice per day	VARSHINI NERALLA	27/12/2024, 3:51 pm	✓	⌵
Created by Me							
Private Reports							
Public Reports							
All Reports							
FOLDERS							
All Folders							
Created by Me							
Shared with Me							
FAVORITES							
All Favorites							

Sharing report to owner:

MY RICE

suppliers

rice mills

consumers

rice details

Reports

Search...

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⚙️

🔔

👤

Report: rice mills with consumers

range of amount per day

Enable Field Editing

Q

Add Chart

⌵

↶

Edit

⌵

Total Records

Total rice price/kg

Total Amount Paid

10

407

6,739.00

<input type="checkbox"/> Rice taken by shops	Consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
<input type="checkbox"/> 12 (1)	battula mounika	1.basmati	29	Cash	348.00
Subtotal			29		348.00
<input type="checkbox"/> 14 (3)	neralla varshini	2.normal rice	25	Cash	350.00
	moyyi prashanti	1.basmati	58	Cash	812.00
	challa deeksha	1.basmati	45	Cash	630.00
Subtotal			128		1,792.00
<input type="checkbox"/> 15 (1)	shivam kumar	2.normal rice	39	Debit card	585.00
Subtotal			39		585.00
<input type="checkbox"/> 17 (2)	jada sukanya	1.basmati	35	Debit card	595.00
	usha rani	1.basmati	66	Debit card	1,156.00
Subtotal			103		1,751.00
<input type="checkbox"/> 18 (2)	revalla sneha	1.basmati	39	UPI	702.00
	ram raj	1.basmati	40	UPI	720.00
Subtotal			79		1,422.00
<input type="checkbox"/> 29 (1)	swapna kumari	2.normal rice	29	UPI	841.00
Subtotal			29		841.00
Total (10)			407		6,739.00

Row Counts

☒ Detail Rows

☒ Subtotals

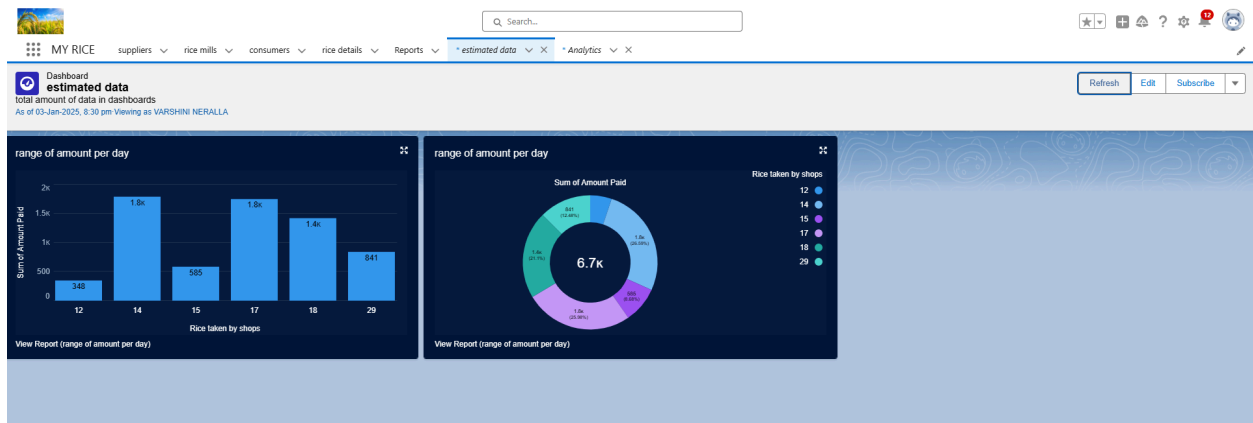
☒ Grand Total

CREATE A REPORT FOLDER:

REPORTS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	Einstein Bot Reports	Automated Process	25/12/2024, 6:13 pm	Automated Process	25/12/2024, 6:13 pm
Created by Me	Einstein Bot Reports Spring '23	Automated Process	25/12/2024, 6:13 pm	Automated Process	25/12/2024, 6:13 pm
Private Reports	Einstein Bot Reports Summer '23	Automated Process	25/12/2024, 6:13 pm	Automated Process	25/12/2024, 6:13 pm
Public Reports	Einstein Bot Reports Summer '22	Automated Process	25/12/2024, 6:13 pm	Automated Process	25/12/2024, 6:13 pm
All Reports	Einstein Bot Reports Winter '23	Automated Process	25/12/2024, 6:13 pm	Automated Process	25/12/2024, 6:13 pm
FOLDERS	Enablement Dashboard Reports Spring '24	Automated Process	25/12/2024, 6:13 pm	Automated Process	25/12/2024, 6:13 pm
All Folders	Enablement Dashboard Reports Summer '24	Automated Process	25/12/2024, 6:13 pm	Automated Process	25/12/2024, 6:13 pm
	estimated rice per day	VARSHINI NERALLA	27/12/2024, 3:56 pm	VARSHINI NERALLA	27/12/2024, 3:56 pm

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.



APEX:

```
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));
7             email.setSubject('Welcome to our company');
8             email.setPlainTextBody('Dear ' + ' ' + ',\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\n');
12             Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
13         }
14     }
15 }
16
17
```

```
Developer Console - Google Chrome
projectcom-a6-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help < >

ConsumerRecord.apxc * 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 }
```

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.