

Project Title : CRM APPLICATION FOR WHOLESALE RICE MILL

1. Project Overview :

The Rice Mill CRM Application is a comprehensive solution for managing and simplifying rice production and sales tracking. It enables daily reporting on rice quantity, type, and sales, which is then communicated to the owners. This CRM leverages customer relationship management to enhance customer engagement, streamline operations, and improve efficiency in the rice mill factory. The project aims to deliver a user-friendly application that meets the specific operational needs of a rice mill.

2. Objectives

Business Goals: The Rice Mill CRM Application will automate daily production and revenue reporting, providing owners with clear insights into operational performance. It will also implement customer analytics to identify buying trends and popular rice varieties, enabling targeted marketing and better customer understanding. Additionally, the application will streamline resource allocation by forecasting demand and analyzing sales patterns, helping the business optimize inventory and manage resources efficiently.

Specific Outcomes: The Rice Mill CRM Application will automate daily production and revenue reporting, track customer buying trends, and optimize resource allocation based on demand forecasts and sales patterns, providing clear insights for operational efficiency.

3. Salesforce Key Features and Concepts Utilized

1.Reporting and Dashboards:

- **Daily Sales and Production Reports:** Generates detailed reports on how much rice is produced & sold each day.
- **Revenue Reports:** Provides insights into daily revenue generated.
- **Customer Analytics:** Tracks popular rice types and most frequent buyers.
- **Resource Allocation:** Helps owners understand data for better resource allocation and future planning.

2. Rollup Summary Field

- **Purpose:** Summarizes data from a child object to a parent object that shares a master-detail relationship.
- **Functions:** Can use COUNT, SUM, MIN, and MAX functions.

3. Cross-Object Formula Field

- **Purpose:** References fields from another object in Salesforce.
- **Function:** Calculates the total amount payable by multiplying the number of rice units taken by the price per kg.

4. Validation Rules

- **Purpose:** Ensures data integrity by validating user inputs.
- **Is Blank Formula:** Verifies if a field is blank and displays an error message if the rule returns a value of "True."

5. Permission Sets

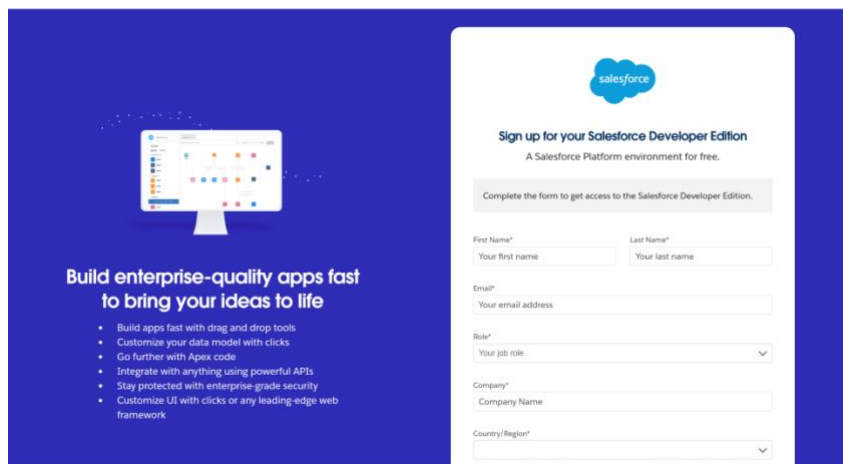
- **Organization Wide Defaults (OWD):** Defines the baseline level of access for the most restricted user.
- **Roles and Access:**
- **Owner:** Can view records of employers and workers.
- **Employer:** Can view records of workers.

4. Detailed Steps to Solution Design

Activity 1: Creating Developer Account and Account activation.

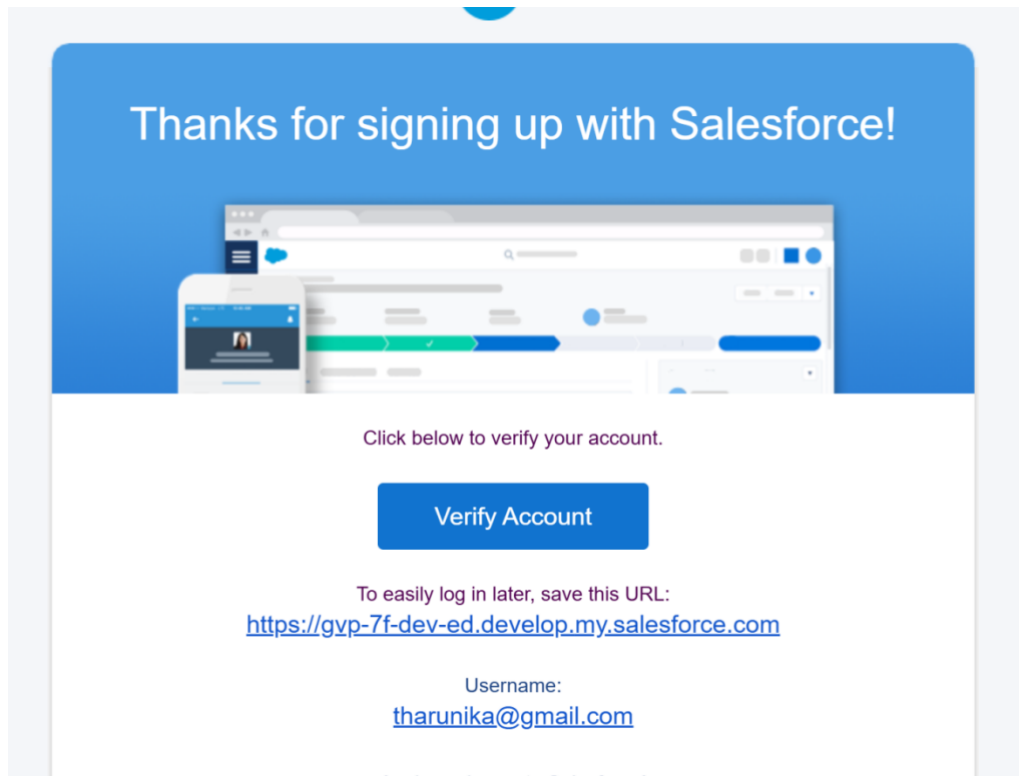
Steps:

- On the sign up form, enter the following details :
- First name & Last name
- Email
- Role : Developer
- Company : College Name
- County : India
- Postal Code : pin code
- Username : should be a combination of your name and company
- This need not be an actual email id, you can give anything in the format :
username@organization.com
- Click on sign me up after filling these.



ACTIVATION:

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins



Activity 2: Objects

Salesforce objects are of two types:

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

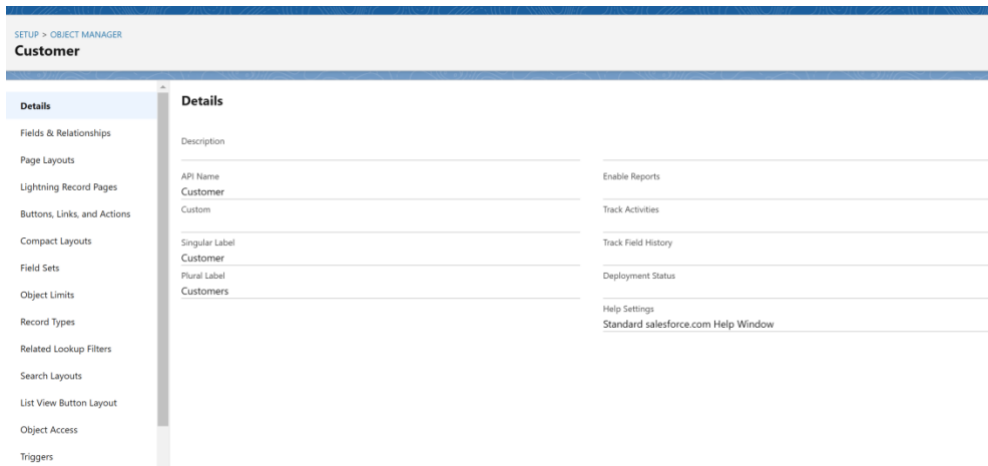
2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

Steps:

Create Supplier Object

- From the setup page >> Click on Object Manager>> Click on Create>>Click on Custom Object.
- Enter the label name>>supplier
- Plural label name>>supplier
- Enter Record Name Label and Format
- Record Name >> supplier Name

- Data Type>>Text
- Click on Allow reports and Track Field History and allow search
- Allow search >> Save.



SETUP > OBJECT MANAGER

Customer

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
- Object Access
- Triggers

Details

Description

API Name
Customer

Custom

Singular Label
Customer

Plural Label
Customers

Enable Reports

Track Activities

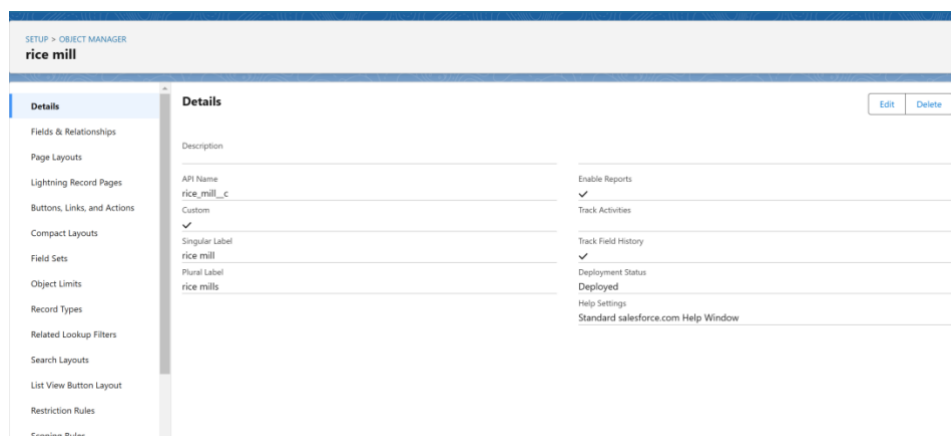
Track Field History

Deployment Status

Help Settings
Standard salesforce.com Help Window

Create Rice mill Object

- From the setup page >> Click on Object Manager>>Click on Create >> Click on Custom Object.
- Enter the label name>>rice mill
- Plural label name>> rice mills
- Enter Record Name Label and Format
- Record Name >>
- Data Type >> Auto Number
- Display Format >> rice-{000}
- Starting number >> 1
- Click on Allow reports and Track Field History, Allow Search and Save.



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

Details

Description

API Name
rice_mill__c

Custom

Singular Label
rice mill

Plural Label
rice mills

Enable Reports
✓

Track Activities

Track Field History
✓

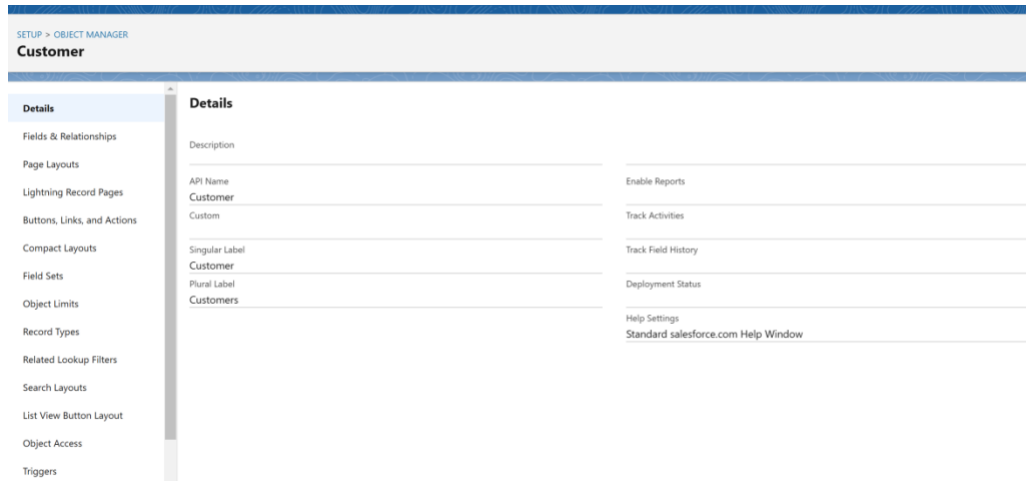
Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

Create consumer Objects

- Use these display format for the consumer
- label name >> consumer
- Plural label name >> consumers
- Display Format >> consumers-{000}
- Starting number >> 1



The screenshot shows the Salesforce Setup page for the 'Customer' object. The left sidebar contains a navigation menu with options like 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, Object Access, and Triggers. The main content area is titled 'Details' and contains the following fields:

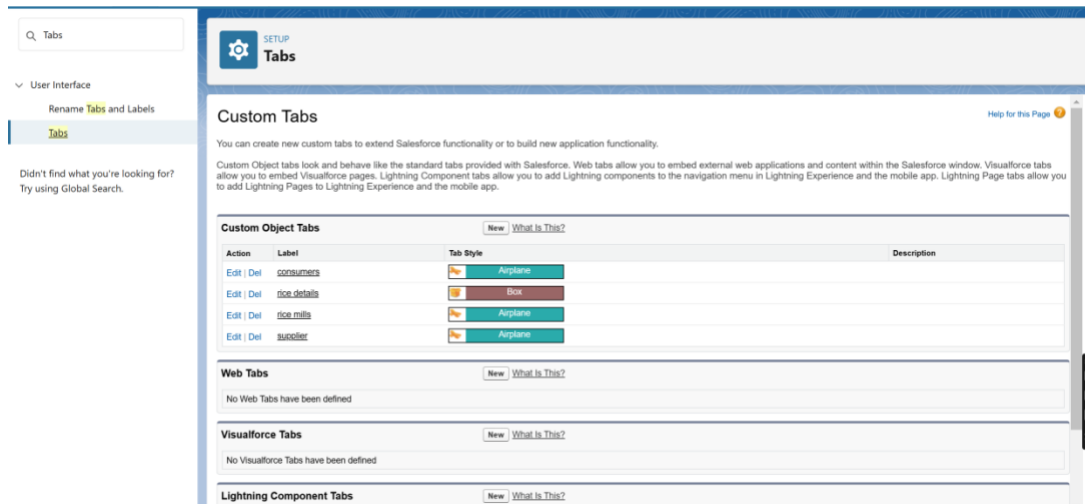
Description	
API Name	Customer
Custom	
Singular Label	Customer
Plural Label	Customers
Enable Reports	
Track Activities	
Track Field History	
Deployment Status	
Help Settings	Standard salesforce.com Help Window

Create rice details Objects

- Use these display format for the rice details
- label name >> rice details
- Plural label name >> rice details
- Display Format >> rice-{000}
- Starting Number >>1

Activity 3: Tabs

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



Activity 4: The Lightning App

Create a Lightning App

- Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App
- 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.
- Upload a photo that is related to your app.
- To add Navigation Item:
- Select the items (supplier, rice mill, consumer , Rice details) from the search bar and move it using the arrow button >> Next.
- To Add User Profiles:
- Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

Activity 5: Fields

Creating the number field in rice details object

- Go to the setup page >> click on object manager >> From drop down click edit for rice details object
- Click on fields & relationship >> click on New.
- Select Data type as “Number” and click Next.
- Given the Field Label as “rice distributed ” and length as “ 5 ”.
- Field Name will be auto populated, and click on Next- Next >> Save.

SETUP > OBJECT MANAGER
rice details

Details

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)		
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 ID	supplier_ID__c	Number(5, 0)		
supplier Name	supplier_Name__c	Master-Detail(supplier)		✓

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

Creating Junction Object

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
- Click on fields & relationship - click on New.
- Select "Master-Detail relationship" as data type and click Next.
- Select the related object "supplier" and click next.
- Give Field Label as "supplier Name" and click Next
- Next >> Next >> Save & New.
- Follow the same steps from 1 to 3.
- Select the related object "rice mill" and click Next.
- Give Field Label as "rice mill 1(one)" and click Next.
- Next >> Next >> Save.

Creating a Master-Detail Relationship

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

SETUP > OBJECT MANAGER
rice mill

Details

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(Owner)		
Last Modified By	LastModifiedById	Lookup(Owner)		
Owner	OwnerId	Lookup(Owner 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)		

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

SETUP > OBJECT MANAGER
supplier

Details

Fields & Relationships
5 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)		✓
sum of rice distributed	sum_of_rice_distributed__c	Roll-Up Summary (SUM rice details)		▼
supplier Name	Name	Text(80)		✓ ▼

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

Creating the Roll-up Summary

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

Setup Home Object Manager

SETUP > OBJECT MANAGER
supplier

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

Custom Field Definition Edit

Field Information

Field Label: sum of rice distributed

Field Name: sum_of_rice_distributed

Description: []

Help Text: []

Data Owner: User

Field Usage: []

Data Sensitivity Level: []

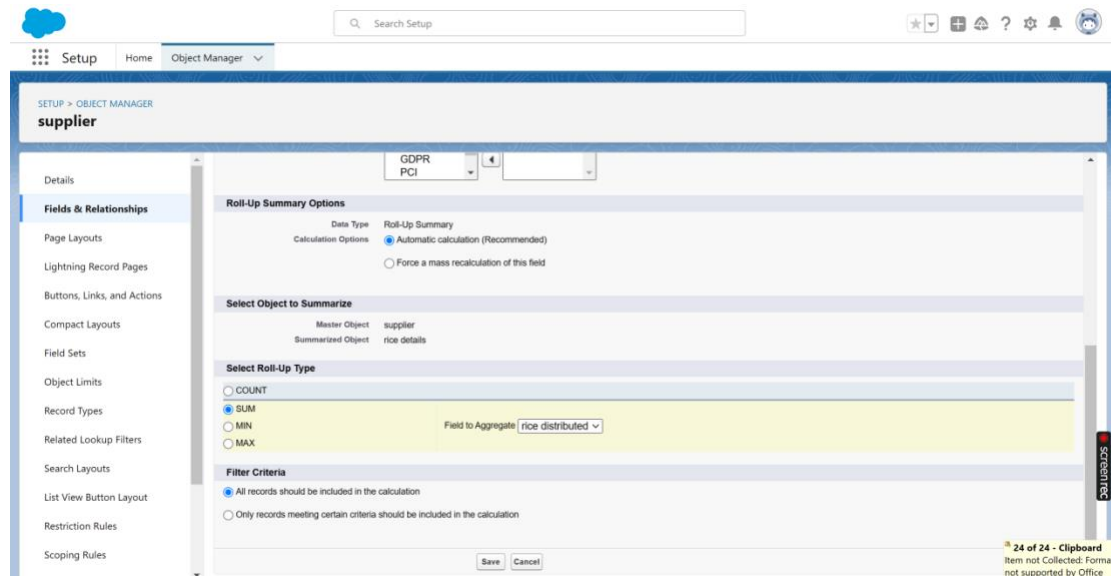
Compliance Categorization: Available Chosen

Roll-Up Summary Options

Date Type: Roll-Up Summary

Calculation Options: Automatic calculation (Recommended)

☐ Force a mass recalculation of this field



SETUP > OBJECT MANAGER

supplier

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

GDPR
PCI

Roll-Up Summary Options

Date Type: Roll-Up Summary

Calculation Options: ☒ Automatic calculation (Recommended)
☐ Force a mass recalculation of this field

Select Object to Summarize

Master Object: supplier
Summarized Object: rice details

Select Roll-Up Type

☐ COUNT
☒ SUM
☐ MIN
☐ MAX

Field to Aggregate: rice distributed

Filter Criteria

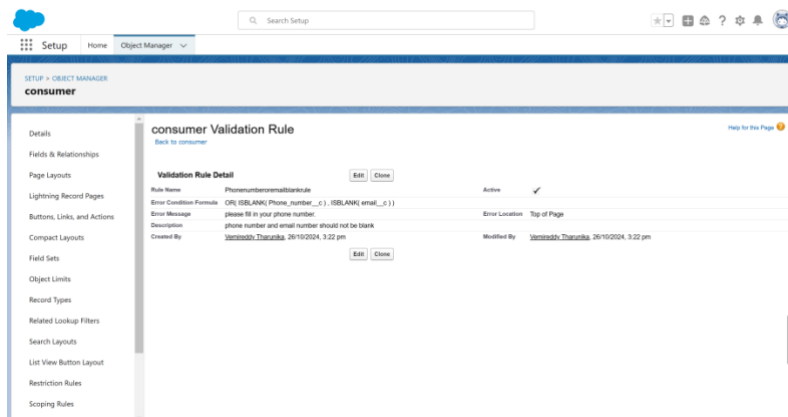
☒ All records should be included in the calculation
☐ Only records meeting certain criteria should be included in the calculation

Save Cancel

24 of 24 - Clipboard
Item not Collected: Format not supported by Office

Creating the validation rule

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



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

consumer Validation Rule

[Back to consumer](#)

Validation Rule Detail

Rule Name: Phonenumberoremailblankrule [Edit](#) [Close](#)

Active: ☒

Error Condition Formula: OR(ISBLANK(Phone_number__c) , ISBLANK(email__c))

Error Message: please fill in your phone number. Error Location: Top of Page

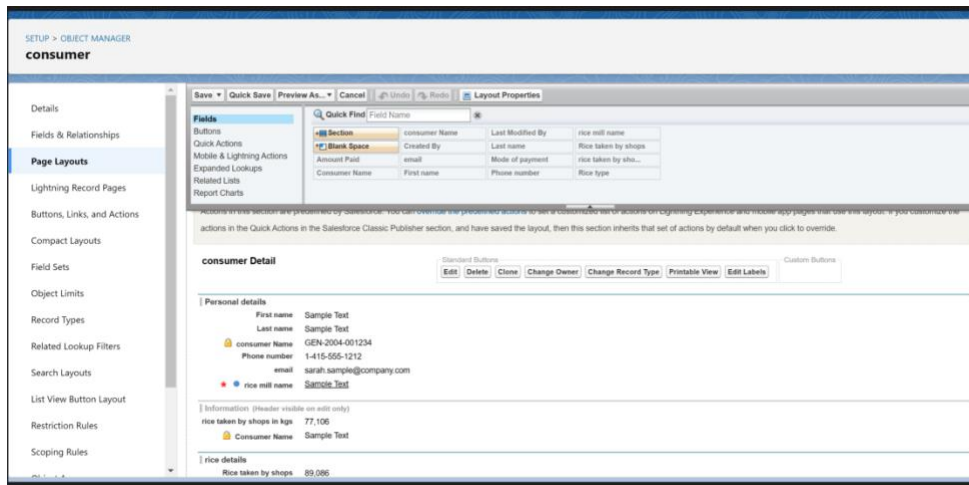
Description: phone number and email number should not be blank

Created By: [Varadachari, Varadachari](#) 26/10/2024, 3:22 pm Modified By: [Varadachari, Varadachari](#) 26/10/2024, 3:22 pm

[Edit](#) [Close](#)

PAGE LAYOUTS

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

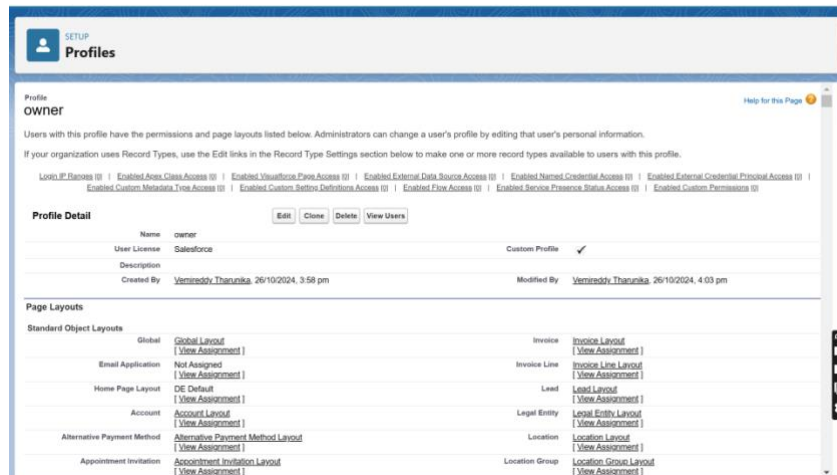


PROFILES

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:

- Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (owner) >> Save.
- 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.
- Give access and save it.



Profile
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 (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Settings Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

Profile Detail [Edit] [Clone] [Delete] [View Users]

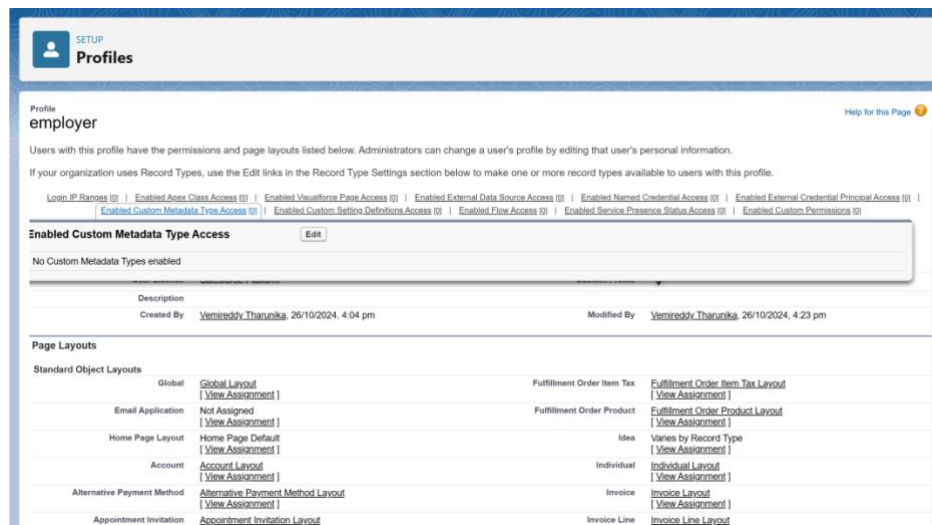
Name	owner
User License	Salesforce
Description	
Created By	Venuresh Tharunika, 26/10/2024, 3:58 pm
Modified By	Venuresh Tharunika, 26/10/2024, 4:03 pm

Page Layouts

Standard Object Layouts	
Global	Global Layout [View Assignment]
Email Application	Not Assigned [View Assignment]
Home Page Layout	DE Default [View Assignment]
Account	Account Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]
Invoice	Invoice Layout [View Assignment]
Invoice Line	Invoice Line Layout [View Assignment]
Lead	Lead Layout [View Assignment]
Legal Entity	Legal Entity Layout [View Assignment]
Location	Location Layout [View Assignment]
Location Group	Location Group Layout [View Assignment]

Employer Profile

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



Profile
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 (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Settings Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

Enabled Custom Metadata Type Access [Edit]

No Custom Metadata Types enabled

Description

Created By: Venuresh Tharunika, 26/10/2024, 4:04 pm

Modified By: Venuresh Tharunika, 26/10/2024, 4:23 pm

Page Layouts

Standard Object Layouts	
Global	Global Layout [View Assignment]
Email Application	Not Assigned [View Assignment]
Home Page Layout	Home Page Default [View Assignment]
Account	Account Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]
Fulfillment Order Item Tax	Fulfillment Order Item Tax Layout [View Assignment]
Fulfillment Order Product	Fulfillment Order Product Layout [View Assignment]
Idea	Varies by Record Type [View Assignment]
Individual	Individual Layout [View Assignment]
Invoice	Invoice Layout [View Assignment]
Invoice Line	Invoice Line Layout [View Assignment]

Worker Profile

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

[illegible]

Report

Create Report:

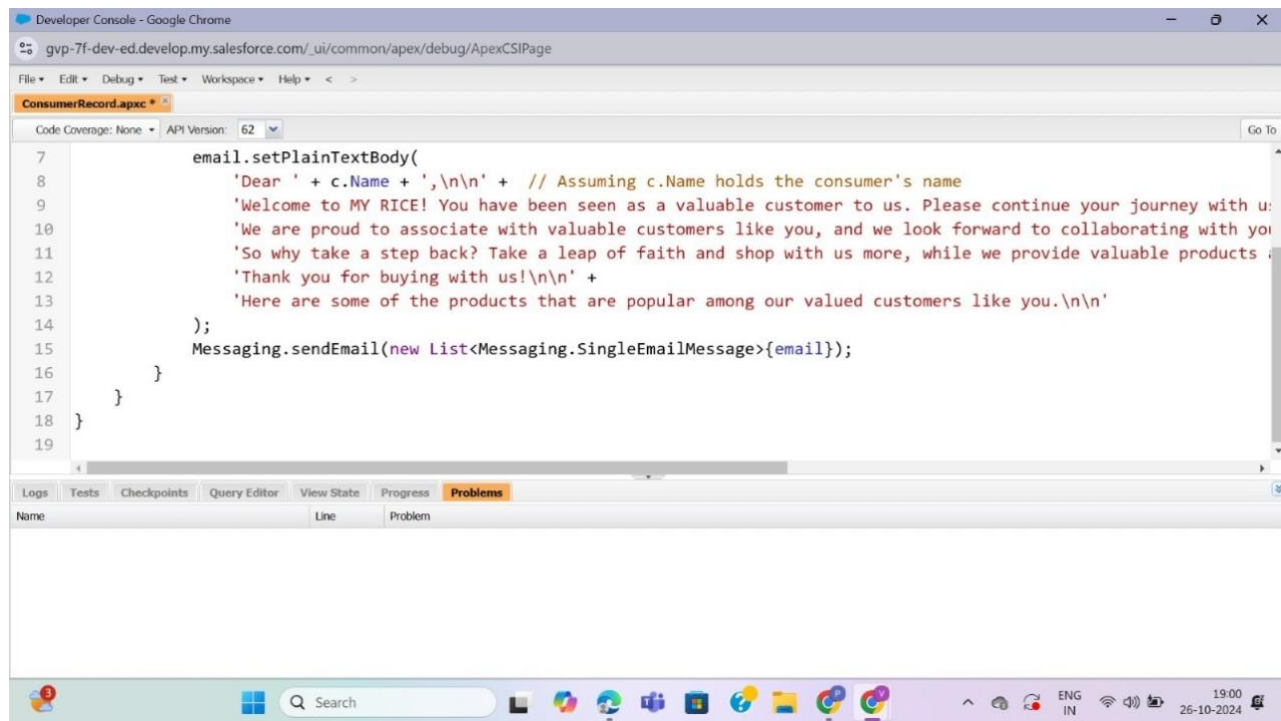
- Go to the app >>click on the reports tab
- Click New Report.
- select for report type, search for “rice mill with consumers” click on it. And click on start report.
- Their outline pane is opened already, select the fields that are mentioned below in the column section.
- 1.consumer name
- 2.rice type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

Report: rice mills with consumers range of amount per day						
<div> <div>Enable Field Editing</div> <div>Q</div> <div>Add Chart</div> <div>▼</div> <div>⌂</div> <div>Edit ▼</div> </div>						
Total Records	Total Rice taken by shops	Total rice price/kg	Total Amount Paid			
10	5,696	4,389	26,21,721.00			
	Rice taken by shops ▼	Rice type ▼	rice price/kg ▼	Mode of payment ▼	Amount Paid ▼	Consumer Name ▼
1	543	2.normal rice	367	Credit card	1,99,281.00	madiha mohabateen
2	70	2.normal rice	45	UPI	3,150.00	sameer Vemireddy
3	345	1.basmati	345	UPI	1,19,025.00	varsham enda
4	700	1.basmati	1,000	Credit card	7,00,000.00	Vemireddy Tharunika
5	345	1.basmati	520	Debit card	1,79,400.00	pani puri
6	700	2.normal rice	500	Debit card	3,50,000.00	Tharunika vemireddy
7	350	1.basmati	567	Cash	1,98,450.00	hemanth vemireddy
8	987	2.normal rice	45	Net banking	44,415.00	tharun vemire
9	456	-	500	Cash	2,28,000.00	sowmya karra
10	1,200	2.normal rice	500	UPI	6,00,000.00	krishna vegenesa
11	5,696		4,389		26,21,721.00	

5. Testing and Validation: 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 :



```

7      email.setPlainTextBody(
8          'Dear ' + c.Name + ',\n\n' + // Assuming c.Name holds the consumer's name
9          'Welcome to MY RICE! You have been seen as a valuable customer to us. Please continue your journey with us.'
10         'We are proud to associate with valuable customers like you, and we look forward to collaborating with you.'
11         'So why take a step back? Take a leap of faith and shop with us more, while we provide valuable products.'
12         'Thank you for buying with us!\n\n' +
13         'Here are some of the products that are popular among our valued customers like you.\n\n'
14     );
15     Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
16 }
17 }
18 }
19

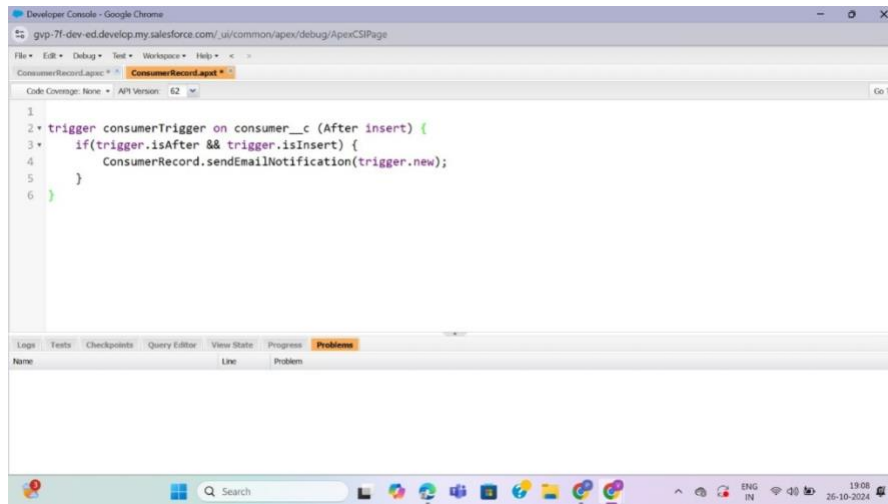
```

Creating an Apex Trigger

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

Syntax For creating trigger :

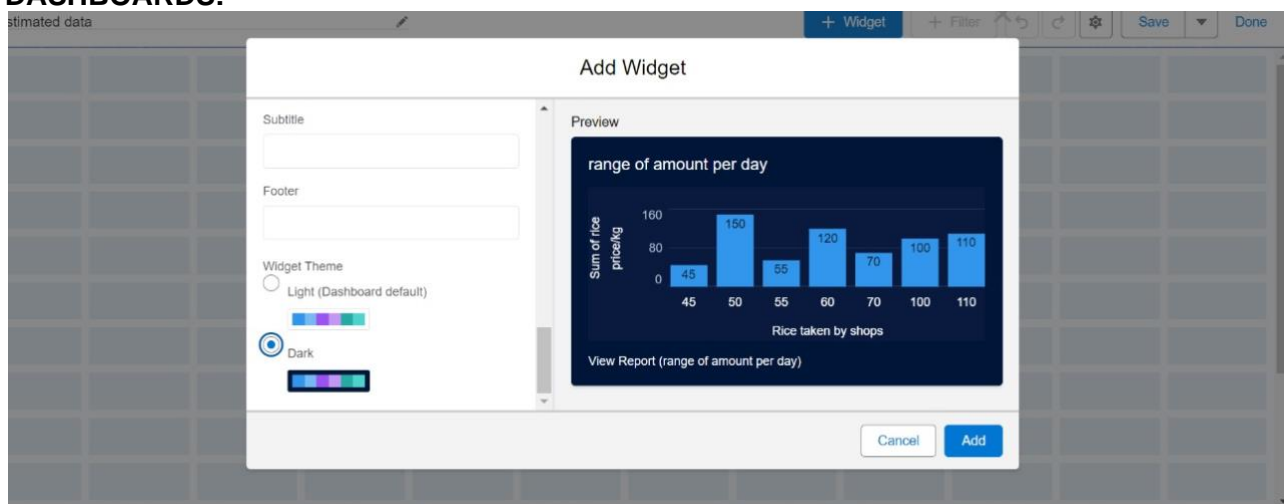
The syntax for creating trigger is :
 Trigger [trigger name] on [object name](Before/After event) {
 //Trigger Logic
 }

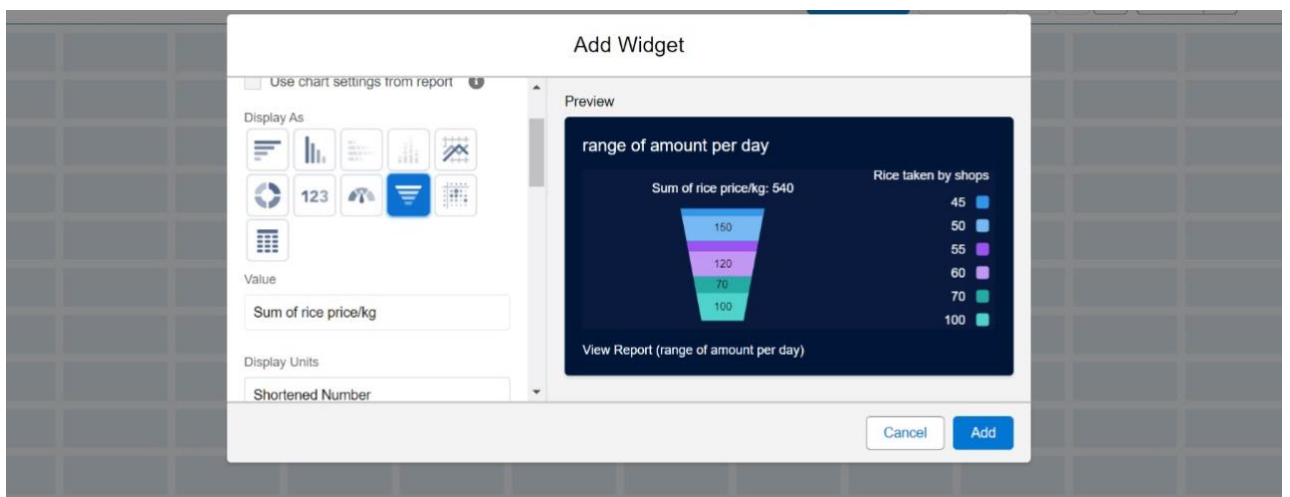
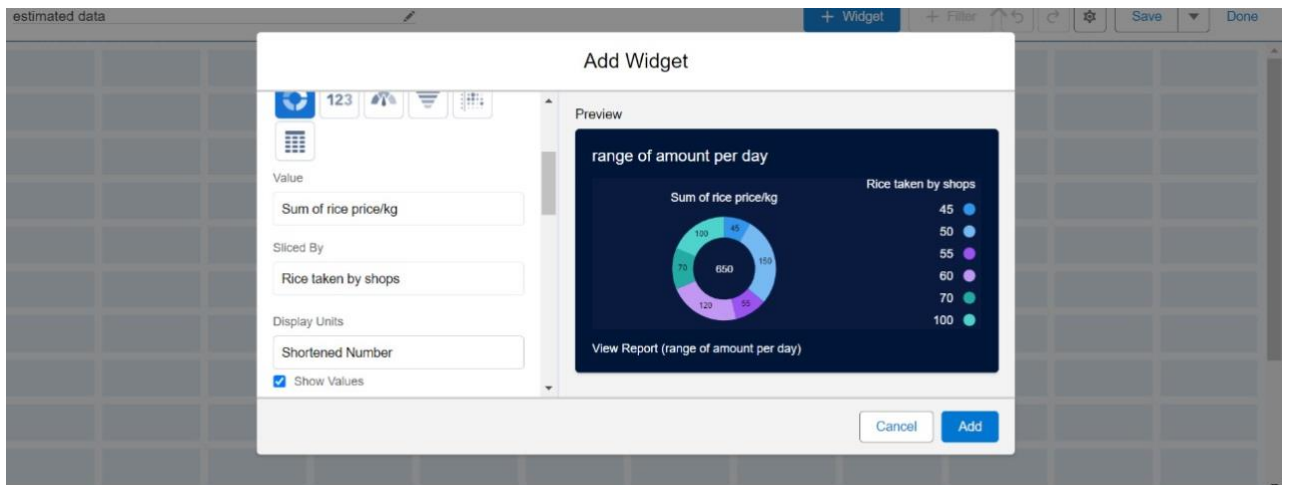


6.Key Scenarios Addressed by Salesforce in the Implementation Project.

- **Sales Process Automation:** Salesforce can automate sales workflows, reducing manual tasks.
- **Customer Support:** Salesforce can provide tools to manage customer service cases and track resolutions.
- **Data Analytics and Reporting:** Salesforce can generate detailed reports for business insights.

DASHBOARDS:





- Resource Management: Salesforce can help allocate resources efficiently based on business needs.

7.Conclusion

In this project, Salesforce streamlined operational processes by enabling automated data calculations, real-time reporting, and secure access control. Custom widgets provided visual insights into rice sales, production, and revenue, enhancing decision-making. Validation rules ensured data accuracy, while role-based access protected sensitive information. Rollup summaries and formulas reduced manual effort in calculations. Overall, Salesforce optimized business operations, contributing to improved productivity and planning.