

# **Project Report**

## **A CRM Application for Wholesale Rice Mill**

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## **Table of Contents**

1. Executive Summary
2. Introduction to Salesforce CRM
3. Project Background
4. Objectives & Goals
5. Application Overview & Key Features
6. Solution Design & Architecture
7. Salesforce Configuration & Development Process
8. Functional Modules
9. Role Management, Permissions & Hierarchies
10. Reports & Dashboards
11. Quality Assurance, Testing & Validation
12. Challenges Faced & Mitigation Strategies
13. Conclusion & Future Scope
14. Appendix: Screenshots & Code Snippets

## **1. Executive Summary**

The "CRM Application for Wholesale Rice Mill" is a powerful and customizable application designed to streamline business operations for rice mills through Salesforce CRM. It leverages Salesforce's robust platform capabilities, allowing mill owners to easily manage their day-to-day business processes, including inventory tracking, sales management, supplier-consumer relationships, and report generation. The application's tailored features help enhance overall business efficiency and profitability.

## **2. Introduction to Salesforce CRM**

Salesforce is a leading Customer Relationship Management (CRM) platform that helps businesses efficiently manage their customer data, business operations, and organizational workflows. By implementing Salesforce for the rice mill industry, this CRM application enables seamless data handling, quick decision-making, and enhanced communication across various departments of a rice mill.

## **3. Project Background**

The wholesale rice mill industry often struggles with manual data management, lack of structured sales tracking, and inefficient customer relations. The objective of this project is to develop a solution to improve the operations of a wholesale rice mill by integrating Salesforce CRM, allowing real-time data visibility, efficient communication between stakeholders, and better decision-making.

### **Challenges:**

- Manual tracking of rice inventory leading to stock mismanagement.
- Delayed communication and reporting between mill owners, suppliers, and consumers.
- No centralized system for recording daily sales, payment status, or inventory data.
- Inefficient resource allocation due to a lack of real-time business insights.

## 4. Objectives & Goals

The primary objective of this project is to create a tailored CRM solution using Salesforce for wholesale rice mills to manage their daily business operations efficiently. Key goals include:

1. **Automate & Centralize Data Management:** Store all customer, supplier, and sales data within a unified platform to streamline data access and updates.
2. **Track Sales & Inventory in Real-Time:** Ensure that inventory levels, daily rice sales, and transactions are recorded and tracked in real-time.
3. **Role-Based Access & Permissions:** Implement access controls to ensure users have role-specific permissions to view, create, and modify data.
4. **Generate Insightful Reports & Dashboards:** Provide visual insights for owners to understand their business performance, revenue, inventory levels, and sales trends.

## 5. Application Overview & Key Features

The CRM application is built to address the challenges faced by rice mills and is centered around efficient data management and business automation.

### Key Features:

1. **Daily Sales & Inventory Tracking**
  - The system records daily sales of different rice types, quantity sold, payment status, and inventory left in the stock.
  - Inventory levels are updated automatically whenever a sale is recorded.
2. **Detailed Customer & Supplier Management**
  - Maintain up-to-date records for each supplier, including rice supplied, contact information, and transactions.
  - Store consumer data for seamless tracking of their orders, rice preferences, and payment details.
3. **Financial Management & Receipt Generation**
  - Track payments through different modes (e.g., credit card, cash, UPI).
  - Automatically generate receipts and invoices for transactions.
4. **Customized Role-Based Access**
  - Roles such as Owner, Employer, and Worker are defined within the system,

each with specific permissions for accessing and managing different types of records.

## 5. Data Insights & Business Analytics

- Generate insightful reports on rice sales, stock levels, and revenue generated.
- Use dashboards to visualize key performance indicators and make informed business decisions.

## 6. Solution Design & Architecture

The CRM solution is designed in a modular and scalable manner to facilitate data flow and efficient management. The architecture comprises:

### 1. Objects & Relationships:

Each key component of the rice mill business is represented as an object in Salesforce (e.g., Supplier, Rice Mill, Consumer, Rice Details).

### 2. Fields & Data Models:

Appropriate data fields are defined for each object to capture essential information. For example, the "Rice Details" object contains fields like "Quantity Sold," "Rice Type," and "Price/Kg."

### 3. Relationships & Junction Objects:

Master-detail and lookup relationships are created to link different objects, facilitating data aggregation, reporting, and seamless data updates.

### 4. Validation Rules & Formulas:

Custom validation rules ensure data integrity and prevent incorrect data entry. Cross-object formula fields allow for automatic calculations, such as total payment due for a rice purchase.

## 7. Salesforce Configuration & Development Process

### Step 1: Salesforce Account Setup

- **Developer Account Creation:** Sign up for a Salesforce Developer account and complete the activation process.
- **Environment Setup:** Ensure proper web browser compatibility and stable internet connection for smooth development.

### Step 2: Object Creation & Configuration

- **Supplier Object:** Stores supplier information and the details of rice supplied.
- **Rice Mill Object:** Captures core rice mill data, including stock and rice type details.
- **Consumer Object:** Manages consumer contact information, purchase history, and payment status.
- **Rice Details Object:** Tracks rice types (e.g., Basmati, Jasmine), quantities taken by consumers, and inventory.

### Step 3: Tabs & User Interface Customization

- **Custom Tabs:** Create and configure tabs for each object for easy navigation.
- **Lightning App Configuration:** Set up a Lightning App with all tabs accessible to different users based on their roles.

### Step 4: Data Fields & Relationships

- **Create Fields:** Add necessary fields like text fields, number fields, and picklists.
- **Define Relationships:** Establish junction objects for many-to-many relationships and master-detail relationships for parent-child data structures.
- **Implement Roll-Up Summaries:** Aggregate data such as total quantity of rice supplied by a specific supplier.

### Step 5: Page Layouts & Record Types

- **Page Layouts:** Customize the display of data in records for each object.
- **Record Types:** Define different record types for variations in data presentation, if

necessary.

## 8. Functional Modules

### 1. Supplier Module

- Manages supplier information, rice types supplied, and contact details.
- Provides real-time updates on supplier transactions and stock received.

### 2. Rice Details Module

- Monitors rice varieties, quantity in stock, and pricing.
- Updates stock status automatically when rice is taken by shops or consumers.

### 3. Order & Sales Module

- Allows workers to add daily rice sales records, track inventory sold, and monitor payments received.
- Cross-object formula fields calculate total payments based on quantity sold and price/kg.

### 4. Reports & Dashboard Module

- Create custom reports for daily rice sales, stock summaries, and payment status.
- Use dashboards to provide owners and employers with visual insights into key business metrics.

## 9. Role Management, Permissions & Hierarchies

### 1. Roles & Role Hierarchy:

- **Owner:** Full access to all records, reports, and dashboards.
- **Employer:** Limited access to manage workers' data and sales transactions.
- **Worker:** Can add new sales records and update existing ones within permissions.

### 2. Permission Sets & Access Control

- Set up permission sets to control data visibility and access for each role.
- **OWD Settings:** Use Organization-Wide Defaults to restrict data access across roles.

## 10. Reports & Dashboards

### 1. Report Generation:

- Create and customize reports to analyze daily, weekly, or monthly sales data.
- Filter reports based on rice type, supplier, and payment status.

### 2. Dashboard Insights:

- Visualize sales performance, stock levels, and top-selling rice varieties.
- Use charts, graphs, and KPIs to help owners and employers make informed decisions.

## 11. Quality Assurance, Testing & Validation

Comprehensive testing was conducted at each development stage to ensure the application meets business requirements. Validation rules were rigorously tested to confirm accurate error handling, and the functionality of all relationships, data access, and permissions was verified.

### Testing Approaches:

- **Unit Testing:** Test each individual module (e.g., supplier creation, inventory updates).
- **Integration Testing:** Test data flow across modules and relationships between objects.
- **User Acceptance Testing:** Conduct testing with end-users (owner, employer) to validate functionality.

## 12. Challenges Faced & Mitigation Strategies

### 1. Complex Data Relationships:

**Challenge:** Managing relationships between multiple objects (e.g., rice types, suppliers). **Solution:** Use master-detail and lookup relationships effectively and implement junction objects for many-to-many relationships.

### 2. Data Accuracy & Validation:

**Challenge:** Ensuring data integrity while recording sales and payments. **Solution:** Implement validation rules and cross-object formulas to prevent errors and auto-calculate fields.

### **3. Role-Based Data Access:**

**Challenge:** Providing appropriate data access while maintaining security.

**Solution:** Configure roles, hierarchies, and permission sets to manage data access effectively.

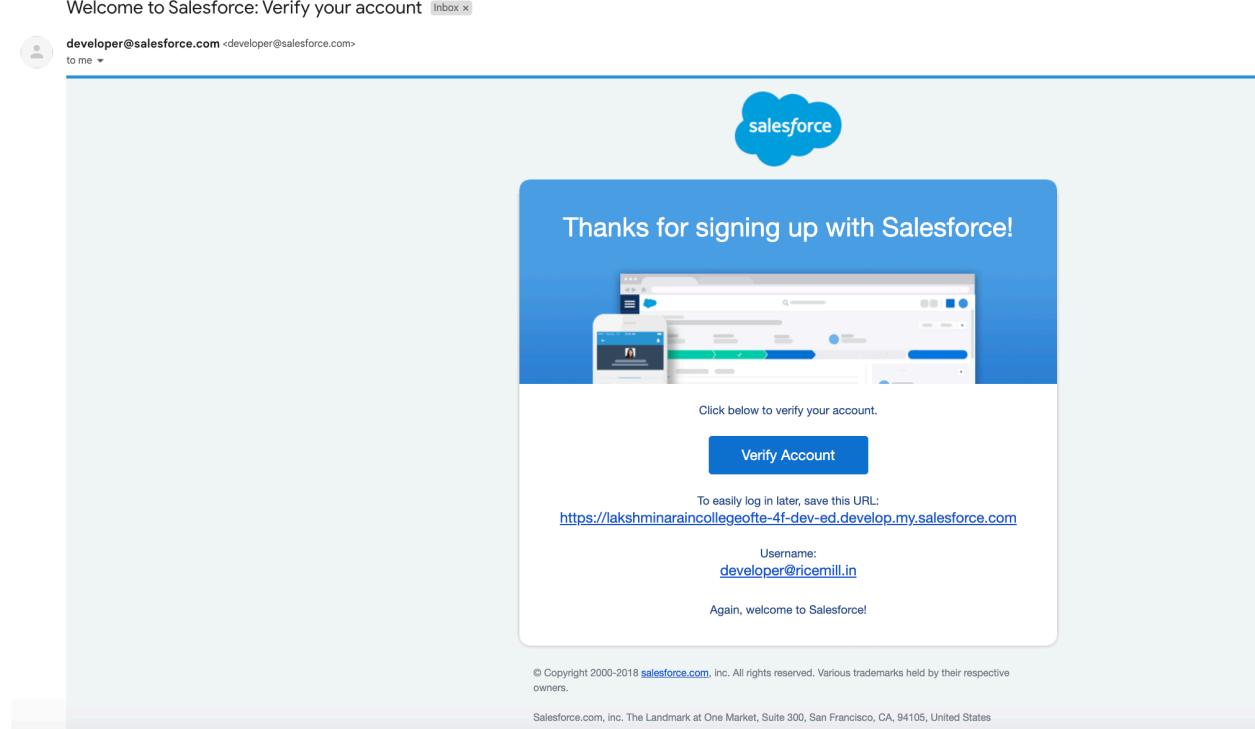
## **13. Conclusion & Future Scope**

The CRM Application for Wholesale Rice Mill effectively meets the business requirements of managing daily sales, tracking inventory, and handling customer relations within a rice mill. It provides a streamlined approach to rice mill operations, enabling real-time updates and efficient management.

### **Future Enhancements:**

- **Notification Systems:** Implement email/SMS alerts for inventory updates and payment reminders.
- **Machine Learning for Predictions:** Integrate sales forecasting features based on historical data.
- **Mobile Accessibility:** Develop a mobile application for on-the-go access to CRM features.

## 14. Appendix: Screenshots & Code Snippets



The screenshot shows the Salesforce Setup Home interface. The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and various icons. The main content area features a "Home" section with three cards: "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative Docs". Below this is a "Most Recently Used" section showing a single item: "Chirag Rai" (User). The left sidebar contains a "Setup" menu with links to "Setup Home", "Service Setup Assistant", "Commerce Setup Assistant", "Multi-Factor Authentication Assistant", "Hyperforce Assistant", "Release Updates", "Lightning Experience Transition Assistant", "Salesforce Mobile App", "Lightning Usage", "Optimizer", "Sales Cloud Everywhere", and "ADMINISTRATION" sections for "Users", "Data", and "Email".

## OBJECT

SETUP > OBJECT MANAGER  
**supplier**

Details	Details	<a href="#">Edit</a> <a href="#">Delete</a>
Fields & Relationships	Description	
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		
API Name <b>supplier_c</b>		
Custom		
✓		
Singular Label <b>supplier</b>		
Plural Label <b>supplier</b>		
Enable Reports ✓		
Track Activities		
Track Field History ✓		
Deployment Status <b>Deployed</b>		
Help Settings Standard salesforce.com Help Window		

SETUP > OBJECT MANAGER  
**rice mill**

Details	Details	<a href="#">Edit</a> <a href="#">Delete</a>
Fields & Relationships	Description	
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		
API Name <b>rice_mill_c</b>		
Custom		
✓		
Singular Label <b>rice mill</b>		
Plural Label <b>rice mills</b>		
Enable Reports ✓		
Track Activities		
Track Field History ✓		
Deployment Status <b>Deployed</b>		
Help Settings Standard salesforce.com Help Window		

SETUP > OBJECT MANAGER

### consumer

Details	
<a href="#">Fields &amp; Relationships</a> <a href="#">Page Layouts</a> <a href="#">Lightning Record Pages</a> <a href="#">Buttons, Links, and Actions</a> <a href="#">Compact Layouts</a> <a href="#">Field Sets</a> <a href="#">Object Limits</a> <a href="#">Record Types</a> <a href="#">Related Lookup Filters</a> <a href="#">Search Layouts</a> <a href="#">List View Button Layout</a> <a href="#">Restriction Rules</a>	<b>Details</b>  Description <hr/> API Name <b>consumer__c</b> Custom <input checked="" type="checkbox"/> Singular Label <b>consumer</b> Plural Label <b>consumers</b>  <hr/> Enable Reports <input checked="" type="checkbox"/> Track Activities <hr/> Track Field History <input checked="" type="checkbox"/> Deployment Status <b>Deployed</b> Help Settings Standard salesforce.com Help Window

[Edit](#) [Delete](#)

SETUP > OBJECT MANAGER

### rice details

Details	
<a href="#">Fields &amp; Relationships</a> <a href="#">Page Layouts</a> <a href="#">Lightning Record Pages</a> <a href="#">Buttons, Links, and Actions</a> <a href="#">Compact Layouts</a> <a href="#">Field Sets</a> <a href="#">Object Limits</a> <a href="#">Record Types</a> <a href="#">Related Lookup Filters</a> <a href="#">Search Layouts</a> <a href="#">List View Button Layout</a> <a href="#">Restriction Rules</a>	<b>Details</b>  Description <hr/> API Name <b>rice_details__c</b> Custom <input checked="" type="checkbox"/> Singular Label <b>rice details</b> Plural Label <b>rice details</b>  <hr/> Enable Reports <input checked="" type="checkbox"/> Track Activities <hr/> Track Field History <input checked="" type="checkbox"/> Deployment Status <b>Deployed</b> Help Settings Standard salesforce.com Help Window

[Edit](#) [Delete](#)

TABS

**Custom Tabs**

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.

Action	Label	Tab Style	Description
Edit   Del	supplier	Box	

**Web Tabs**

No Web Tabs have been defined

**Visualforce Tabs**

No Visualforce Tabs have been defined

**Lightning Component Tabs**

No Lightning component tabs have been defined

**Custom Tabs**

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.

Action	Label	Tab Style	Description
Edit   Del	rice mills	Box	
Edit   Del	supplier	Box	

**Web Tabs**

No Web Tabs have been defined

**Visualforce Tabs**

No Visualforce Tabs have been defined

**Lightning Component Tabs**

No Lightning component tabs have been defined

**Custom Tabs**

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.

Action	Label	Tab Style	Description
Edit   Del	consumers	Box	
Edit   Del	rice mills	Box	
Edit   Del	supplier	Box	

**Web Tabs**

No Web Tabs have been defined

**Visualforce Tabs**

No Visualforce Tabs have been defined

tabs

User Interface

Rename Tabs and Labels

**Tabs**

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

**Custom Tabs**

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**

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

**Web Tabs**

No Web Tabs have been defined

**Visualforce Tabs**

No Visualforce Tabs have been defined

## Lightning

← |  Lightning App Builder |  App Settings |  Pages ▾ | MY RICE | ? Help

**App Settings**

**App Details & Branding**

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

**App Details**

\* App Name  MY RICE

\* Developer Name  MY\_RICE

Description  Enter a description...

**App Branding**

Image  Primary Color Hex Value  #0070D2

Use the app's image and color instead of the org's custom theme

**Org Theme Options**

**App Launcher Preview**



12 MY RICE 04/10/2024, 1:26 am Lightning ✓ 

## Field

**SETUP > OBJECT MANAGER**

## supplier

**Fields & Relationships**

**Custom Field Definition Detail**

**rice distributed**

Back to supplier

Validation Rules ⓘ

Help for this Page ⓘ

Field Information		Object Name	Object Type
Field Label	rice distributed	supplier	Number
Field Name	rice_distributed		
API Name	rice_distributed_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Chirag Rai, 04/10/2024, 1:33 am	Modified By	Chirag Rai, 04/10/2024, 1:33 am

---

**General Options**

Required

Unique

External ID

AI Prediction

Default Value

---

**Number Options**

Length 5

Decimal Places 0

---

**Validation Rules**

No validation rules defined.

Validation Rules Help ⓘ

Always show me ▾ more records per related list

Back To Top

**SETUP > OBJECT MANAGER**

## rice details

**Fields & Relationships**

**Custom Field Definition Detail**

**supplier Name**

Back to rice details

Validation Rules ⓘ

Help for this Page ⓘ

Field Information		Object Name	Object Type
Field Label	supplier Name	rice_details	Master-Detail
Field Name	supplier		
API Name	supplier_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Chirag Rai, 04/10/2024, 1:40 am	Modified By	Chirag Rai, 04/10/2024, 1:40 am

---

**Master-Detail Options**

Related To supplier

Related List Label rice details

Sharing Setting Read/Write: Allows users with at least ReadWrite access to the Master record to create, edit, or delete related Detail records.

Child Relationship Name rice\_details

Reparentable Master Detail

---

**Lookup Filter**

No lookup filters defined.

---

**Validation Rules**

No validation rules defined.

Validation Rules Help ⓘ

Always show me ▾ more records per related list

Back To Top

SETUP > OBJECT MANAGER  
rice details

**rice details Custom Field**  
**rice mill 1(one)**  
[Back to rice details](#)

[Validation Rules](#)

**Custom Field Definition Detail**

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

**Field Information**

Field Label	rice mill 1(one)	Object Name	rice_details
Field Name	rice_mill_1_one	Data Type	Master-Detail
API Name	rice_mill_1_one_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By Chirag Rai, 04/10/2024, 1:41 am Modified By Chirag Rai, 04/10/2024, 1:41 am

---

**Master-Detail Options**

Related To	rice_mill	Child Relationship Name	rice_details
Related List Label	rice details		
Sharing Setting	ReadWrite: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		
Representable Master Detail	<input type="checkbox"/>		

---

**Lookup Filter**  
No lookup filters defined.

---

**Validation Rules**

No validation rules defined.

[Validation Rules Help](#)

[Back To Top](#)

Always show me more records per related list

SETUP > OBJECT MANAGER  
consumer

**consumer Custom Field**  
**rice mill name**  
[Back to consumer](#)

[Validation Rules](#)

**Custom Field Definition Detail**

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

**Field Information**

Field Label	rice mill name	Object Name	consumer
Field Name	rice_mill_name	Data Type	Master-Detail
API Name	rice_mill_name_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By Chirag Rai, 04/10/2024, 1:44 am Modified By Chirag Rai, 04/10/2024, 1:44 am

---

**Master-Detail Options**

Related To	rice_mill	Child Relationship Name	consumers
Related List Label	consumers		
Sharing Setting	ReadWrite: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		
Representable Master Detail	<input type="checkbox"/>		

---

**Lookup Filter**  
No lookup filters defined.

---

**Validation Rules**

No validation rules defined.

[Validation Rules Help](#)

[Back To Top](#)

Always show me more records per related list

**SETUP > OBJECT MANAGER**

## rice details

**Fields & Relationships**

Field Label	Field Name	Data Type	Controlling Field	Indexed
supplier Name	supplier	Text		✓

**Validation Rules**

No validation rules defined.

**SETUP > OBJECT MANAGER**

## consumer

**Fields & Relationships**

Field Label	Field Name	Data Type	Controlling Field	Indexed
consumer	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		✓
email	email__c	Email		✓
First name	First_name__c	Text(40)		✓
Last Modified By	LastModifiedById	Lookup(User)		✓
Last name	Last_name__c	Text(40)		✓
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 type	Rice_type__c	Picklist		✓

**SETUP > OBJECT MANAGER**

## consumer

**Fields & Relationships**

Field Label	Field Name	Data Type	Controlling Field	Indexed
Amount Paid	Amount_Paid__c	Formula (Number)		✓
consumer	Name	Auto Number		✓
Consumer Name	Consumer_Name__c	Formula (Text)		✓

**Object Manager**

**consumer Validation Rule**

[Back to consumer](#)

**Validation Rule Detail**

Rule Name	Phonenumberoremailblankrule	Active	✓
Error Condition Formula	OR( ISBLANK( Phone_number__c ), ISBLANK( email__c ) )	Error Location	Top of Page
Error Message	please fill in your phone number.	Description	phone number and email number should not be blank
Created By	Chirag Rai, 04/10/2024, 2:32 am	Modified By	Chirag Rai, 04/10/2024, 2:32 am

## Page Layout

**SETUP > OBJECT MANAGER**

**consumer**

**Page Layouts**

**Fields**

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

**personal details**

First name	Sample Text
Last name	Sample Text
Consumer Name	Sample Text
Phone number	1-415-555-1212
email	sarah.sample@company.com
rice mill name	Sample Text

**rice details**

Rice taken by shops	75,682
Rice type	Sample Text

**Receipt details**

Mode of payment	Sample Text
Amount Paid	233.75

## profiles

profile

Users Profiles

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

**SETUP Profiles**

Profile Edit employer

Help for this Page ?

Set the permissions and page layouts for this profile.

**Profile Edit**

Name	employer	Save	Save & New	Cancel
User License	Salesforce	Custom Profile ✓		
Description				

**Custom App Settings**

	Visible	Default	Visible	Default	
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input type="checkbox"/>	<input checked="" type="radio"/>
Automation (standard__FlowsApp)	<input type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>

Required Information

profile

Users Profiles

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

**SETUP Profiles**

Profile Edit owner

Help for this Page ?

Set the permissions and page layouts for this profile.

**Profile Edit**

Name	owner	Save	Save & New	Cancel
User License	Salesforce	Custom Profile ✓		
Description				

**Custom App Settings**

	Visible	Default	Visible	Default	
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input type="checkbox"/>	<input checked="" type="radio"/>
Automation (standard__FlowsApp)	<input type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>

Required Information

profile

Users Profiles

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

**SETUP Profiles**

Profile Edit worker

Help for this Page ?

Set the permissions and page layouts for this profile.

**Profile Edit**

Name	worker	Save	Save & New	Cancel
User License	Salesforce	Custom Profile ✓		
Description				

**Custom App Settings**

	Visible	Default	Visible	Default	
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input type="checkbox"/>	<input checked="" type="radio"/>
Automation (standard__FlowsApp)	<input type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>

Required Information

## Roles

**SETUP Roles**

**Role Owner**

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

Hierarchy: Lakshmi Narain College of Technology & Science > CEO > owner  
Siblings: SVP\_Sales & Marketing, SVP\_Customer Service & Support, CFO, SVP\_Human Resources, COO

[Users in owner Role \(0\)](#)

**Role Detail**

	Label	Role Name
This role reports to	owner	Role Name as displayed on reports
Modified By	Chirag Rai, 04/10/2024, 2:50 am	Sharing Groups
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities	Role, Role and Internal Subordinates
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases	

**Users in owner Role**

[Assign Users to Role](#) [New User](#) [Users in owner Role Help \(1\)](#)

No records to display

**SETUP Roles**

**Role employer**

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

Hierarchy: Lakshmi Narain College of Technology & Science > CEO > owner > employer

[Users in employer Role \(0\)](#)

**Role Detail**

	Label	Role Name
This role reports to	owner	Role Name as displayed on reports
Modified By	Chirag Rai, 04/10/2024, 2:51 am	Sharing Groups
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities	Role, Role and Internal Subordinates
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases	

**Users in employer Role**

[Assign Users to Role](#) [New User](#) [Users in employer Role Help \(1\)](#)

No records to display

**SETUP Roles**

**Role Worker**

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

Hierarchy: Lakshmi Narain College of Technology & Science > CEO > owner > employer > worker

[Users in worker Role \(0\)](#)

**Role Detail**

	Label	Role Name
This role reports to	employer	Role Name as displayed on reports
Modified By	Chirag Rai, 04/10/2024, 2:52 am	Sharing Groups
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities	Role, Role and Internal Subordinates
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases	

**Users in worker Role**

[Assign Users to Role](#) [New User](#) [Users in worker Role Help \(1\)](#)

No records to display

# Users

The screenshot shows the Salesforce Setup interface under the 'Users' section. The user profile for 'vicky y' is displayed. Key details include:

- Name:** vicky y
- Email:** chirag.rai.2003@gmail.com
- Role:** owner
- User License:** Salesforce
- Profile:** owner
- Active:** ✓
- Delegated Approver:** Manager
- Mobile Push Registrations:** View
- Data.com User Type:** Data.com User

The sidebar on the left shows other users like 'ram ram' and 'Did you find what you're looking for? Try using Global Search.'

The screenshot shows the Salesforce Setup interface under the 'Users' section. The user profile for 'ram ram' is displayed. Key details include:

- Name:** ram ram
- Email:** chirag.rai.2003@gmail.com
- Role:** employer
- User License:** Salesforce Platform
- Profile:** Standard Platform User
- Active:** ✓
- Delegated Approver:** Manager
- Mobile Push Registrations:** View
- Data.com User Type:** Data.com User

The sidebar on the left shows other users like 'vicky y' and 'Did you find what you're looking for? Try using Global Search.'

User Detail

Name	ragu raj	Role	worker
Alias	rraj	User License	Salesforce Platform
Email	chirag.raj.2003@gmail.com [Verify]	Profile	Standard Platform User
Username	worker@nricemill.in	Active	<input checked="" type="checkbox"/>
Nickname	ragu	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>

## permission sets

Object	Sharing Rule	Access Level	Status
Work Order		Private	<input checked="" type="checkbox"/>
Work Plan		Private	<input checked="" type="checkbox"/>
Work Plan Template		Private	<input checked="" type="checkbox"/>
Work Step Template		Private	<input checked="" type="checkbox"/>
Work Type		Private	<input checked="" type="checkbox"/>
Work Type Group		Public Read/Write	<input checked="" type="checkbox"/>
consumer		Controlled by Parent	<input checked="" type="checkbox"/>
rice details		Controlled by Parent	<input checked="" type="checkbox"/>
rice mill		Public Read Only	<input checked="" type="checkbox"/>
supplier		Public Read Only	<input checked="" type="checkbox"/>

## Report

Recently Viewed

Rank	Consumer ID	Action
1	consumer-010	
2	consumer-009	
3	consumer-008	
4	consumer-007	
5	consumer-006	
6	consumer-005	
7	consumer-004	
8	consumer-003	
9	consumer-002	
10	consumer-001	

Home > Lightning Report

Report: rice mills with consumers  
range of amount per day

Total Records 10 Total rice price/kg 110 Total Amount Paid 5,130.00

<input type="checkbox"/> Rice taken by shops ↑	Consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
<input type="checkbox"/> 2 (1)	Amy5 Drake5	2.normal rice	50	Net banking	100.00
<b>Subtotal</b>			50		100.00
<input type="checkbox"/> 3 (2)	Paul7 Hall7	2.normal rice	20	Credit card	60.00
	Luke9 Ross9	2.normal rice	50	UPI	150.00
<b>Subtotal</b>			70		210.00
<input type="checkbox"/> 5 (1)	jone1 done1	1.basmati	10	Credit card	50.00
<b>Subtotal</b>			10		50.00
<input type="checkbox"/> 7 (1)	Lisa3 Stone3	1.basmati	50	Cash	350.00
<b>Subtotal</b>			50		350.00
<input type="checkbox"/> 10 (1)	Mark2 Zane2	2.normal rice	10	Debit card	100.00
<b>Subtotal</b>			10		100.00
<input type="checkbox"/> 30 (1)	Emma8 Shore8	2.normal rice	10	Net banking	300.00

Row Counts  Detail Rows  Subtotals  Grand Total

## Edit Subscription

### Settings

#### Frequency

Daily  Weekly  Monthly

#### Time

8:00 am ▾

#### Attachment

[Attach File](#)

### Recipients

To add other recipients to this subscription, make sure the report is saved in a shared folder. [Learn More](#)

#### Run Report As

- Me
- Another Person

### Conditions

[Unsubscribe](#)

[Cancel](#)

[Save](#)

Reports

All Folders > estimated rice per day

1 item

	Name	Description	Folder	Created By	Created On	Subscribed
REPORTS	Recent	range of amount per day	estimated rice per day	Chirag Rai	4/10/2024, 3:31 am	✓
Created by Me						
Private Reports						
Public Reports						
All Reports						
FOLDERS	All Folders					
Created by Me						
Shared with Me						
FAVORITES	All Favorites					

## Dashboard

MY RICE

supplier rice mills rice details consumers \* Reports \* Analytics \* Dashboards

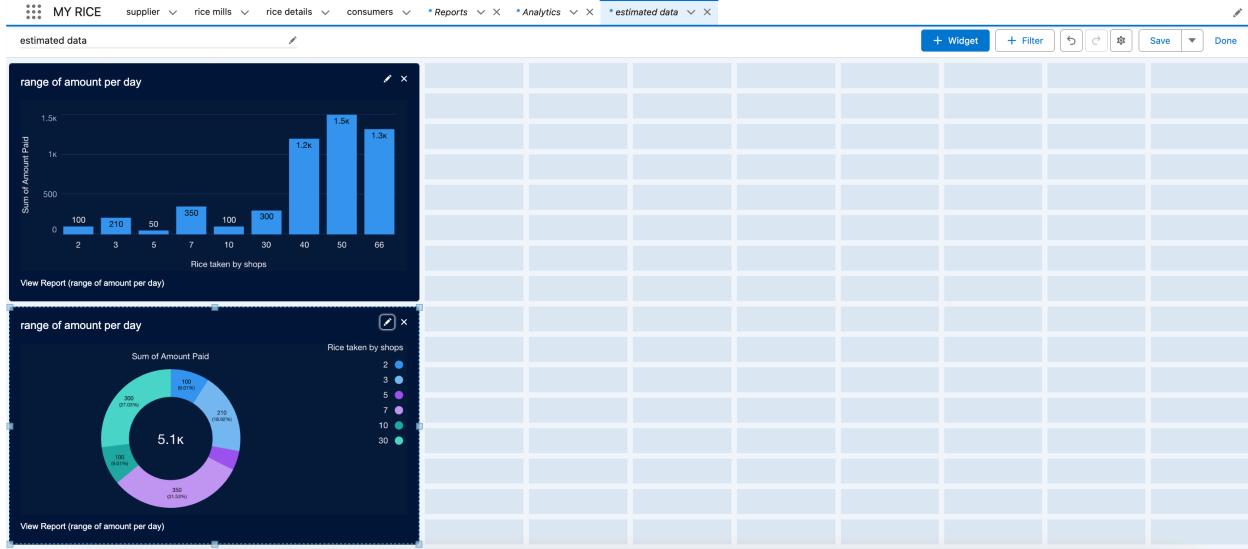
New Dashboard

\* Name: estimated data

Description: total amount of data in dashboards

Folder: amount data

Cancel Create



APEX

Developer Console

lakshminaraincollegeofe-4f-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help < >

ConsumerRecord.apxc \* Code Coverage: None API Version: 51 Go To

```
! 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 ' + ' '+ '\n\nWelcome to MY RICE!'+'You have been seen as a valuable customer to
! 9           "We are proud to associate with valuable customers like you and we look forward to
! 10          '+So why taking a step back, take a leap of faith and shop with us more, while we p
! 11          'Thankyou for buying '+ '' +'Here are some of the products that are brought by the
12          Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
13
14    }
15
! 16 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems 13

Developer Console

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

ConsumerRecord.apxc ▾ consumerTrigger.apxt ▾

Code Coverage: None ▾ API Version: 61 ▾ Go To

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

Logs Tests Checkpoints Query Editor View State Progress Problems 00

User	Application	Operation	Time ▾	Status	Read	Size

Filter Click here to filter the log list