

# **A CRM APPLICATION FOR WHOLESALE RICE MILL.**

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## **Abstract**

This project report presents a comprehensive CRM application designed to streamline daily operations in a wholesale rice mill. Leveraging Salesforce, the application provides detailed reports, rollup summary fields, cross-object formula fields, validation rules, and permission sets to improve efficiency and resource allocation.

The wholesale rice milling industry faces numerous challenges in managing daily operations, customer relationships, and reporting. This project aims to develop a comprehensive CRM application using Salesforce to streamline and simplify the management of daily rice production, sales, and reporting. By leveraging the power of Salesforce, the application enhances customer experiences, optimizes store operations, and improves overall efficiency in the rice mill factory.

## **Project Objectives**

- Develop a user-friendly CRM application.
- Streamline daily operations and reporting.
- Enhance customer experience and optimize resource allocation.

## **Description**

The application is built on the Salesforce platform, utilizing custom objects, fields, and relationships to manage data efficiently. The architecture includes:

- Custom Objects: Supplier, Rice Mill, Consumer, Rice Details
- Fields: Number fields, rollup summary fields, cross-object formula fields
- Relationships: Master-Detail relationships
- User Interface: Custom Tabs, Page Layouts, Lightning App
- Security: Validation Rules, Permission Sets

### **1. Project Overview**

This project is focused on implementing a Salesforce CRM system designed to address the

challenge of managing customer interactions efficiently. The goal is to deliver a comprehensive solution by leveraging Salesforce Sales Cloud. Through this project, we aim to enhance operational efficiency, user experience, and data accuracy, supporting the long-term goals of Corp.

## 2. Objectives

- **Business Goals:** Increase sales by 20% in the next quarter.
- **Specific Outcomes:** Implement a new CRM system to streamline customer interactions and improve data accuracy.

## 3. Salesforce Key Features and Concepts Utilized

- **Main Functionalities:** Utilized Salesforce Sales Cloud for managing sales processes.
- **Key Features:** Custom Objects, Workflows, Apex Triggers, Reports, and Dashboards.
- **This project aims to develop a user-friendly and feature-rich application that addresses the specific needs of a rice mill factory.**

## 4. Detailed Steps to Solution Design

- **Data Models:** Documented entities like Accounts, Contacts, Opportunities, and their relationships.
- **User Interface Designs:** Provided wireframes and mockups of the user interface.
- **Business Logic:** Implemented validation rules, triggers, and workflows to automate processes.

## Introduction:

### 1. Developer Account Creation and Activation

- Sign up for a Salesforce Developer account.

The screenshot shows the Salesforce Setup Home interface. At the top, there's a navigation bar with tabs for 'Recently Viewed', 'Home | Salesforce', 'Recent | Reports | Salesforce', 'Manasa Full Song With Telu', and 'Get your Completion Certificate'. Below the navigation bar is a search bar labeled 'Search Setup'.

The main content area features a 'Setup Home' section with two cards: 'Get Started with Einstein Bots' (Launch an AI-powered bot to automate your digital connections) and 'Mobile Publisher' (Use the Mobile Publisher to create your own branded mobile app). There are also sections for 'Most Recently Used' (listing 10 items including 'consumer' and 'Naresh Godugu') and 'Quick Find'.

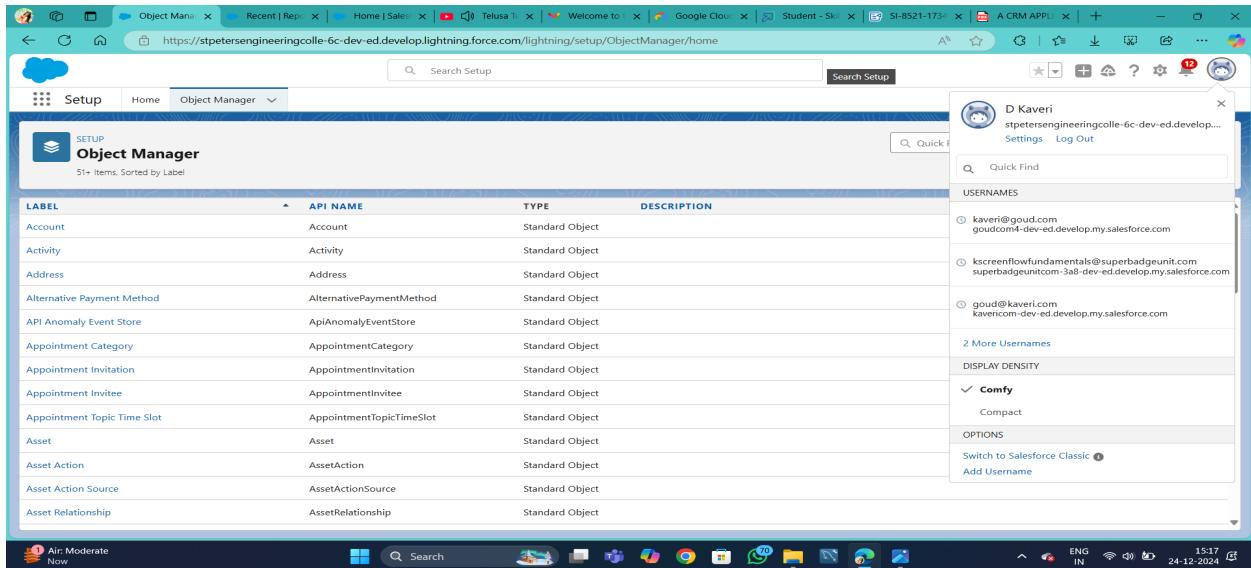
A sidebar on the left lists various setup categories: 'Setup Home', 'Service Setup Assistant', 'Commerce Setup Assistant', 'Hyperforce Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', 'Sales Cloud Everywhere', and 'ADMINISTRATION' (with sub-options for 'Users', 'Data', 'Email').

A right-hand sidebar displays user information for 'D Kaveri' (stpetersengineeringcoll-6c-dev-ed.develop....), including a profile picture, email (kaveri@goud.com), and other users (kscreflowfundamentals@superbadgeunit.com, goud@goud.com). It also includes settings for 'DISPLAY DENSITY' (set to 'Comfy'), 'OPTIONS' (Compact), and links to 'Switch to Salesforce Classic' and 'Add Username'.

The bottom of the screen shows a taskbar with icons for various applications like Microsoft Word, Excel, and Powerpoint, along with system status indicators for battery, signal, and date/time (24-12-2024).

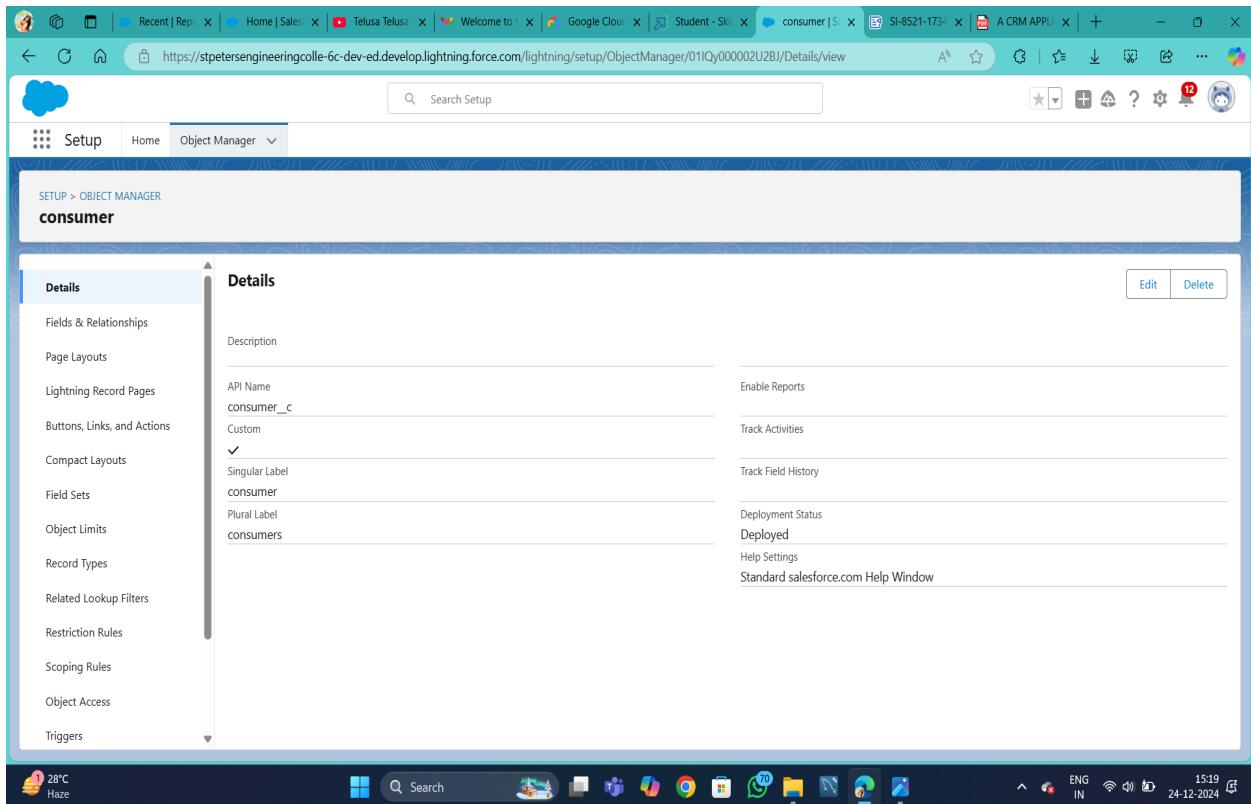
## 2.Object Creation

### Creating objects of supplier, consumer, rice mill, and rice details.



The screenshot shows the Salesforce Object Manager page. The left sidebar lists categories: SETUP, Home, and Object Manager. The main area displays a table of standard objects with columns: LABEL, API NAME, TYPE, and DESCRIPTION. The table includes rows for Account, Activity, Address, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Asset, Asset Action, Asset Action Source, and Asset Relationship. A right-hand sidebar shows user profiles and settings, including a dropdown for 'DISPLAY DENSITY' set to 'Compact'. The status bar at the bottom indicates it's 15:17 on 24-12-2024.

- Consumer Object: Manage consumer details.



The screenshot shows the details page for the 'consumer' object in the Object Manager. The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, and Triggers. The main area shows the 'Details' section for the consumer object, which includes fields for Description, API Name (consumer\_c), Custom (checked), Singular Label (consumer), Plural Label (consumers), Enable Reports, Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and Help Window (Standard salesforce.com Help Window). The status bar at the bottom indicates it's 15:19 on 24-12-2024.

## ● Supplier Object: Manage supplier details.

The screenshot shows the Salesforce Object Manager interface for the 'supplier' object. The left sidebar lists various configuration options: 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, and Scoping Rules. The main 'Details' pane shows the following fields:

Field	Value
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

The status bar at the bottom indicates it's 15:20 on 24-12-2024.

## ● Rice Mill Object: Manage rice mill details.

The screenshot shows the Salesforce Object Manager interface for the 'rice mill' object. The left sidebar lists various configuration options: 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, and Scoping Rules. The main 'Details' pane shows the following fields:

Field	Value
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

The status bar at the bottom indicates it's 15:20 on 24-12-2024.

- Rice Details Object: Track rice production and sales.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a blue cloud icon, a search bar labeled "Search Setup", and various global buttons. The main header displays "SETUP > OBJECT MANAGER" and the object name "rice details".

The left sidebar lists several configuration tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, and Triggers. The "Details" tab is currently selected.

The main content area displays the following details for the "rice details" object:

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

At the bottom of the screen, there is a taskbar with icons for weather (28°C Haze), search, file explorer, Microsoft Word, Microsoft Excel, Google Chrome, Google Sheets, Google Slides, Microsoft Powerpoint, and Microsoft Edge. The system tray shows battery level, network status, language (ENG IN), date (24-12-2024), and time (15:21).

### 3.Creating of tabs :

- Create custom tabs for each object to easily access data.

The screenshot shows the Salesforce Setup interface with the URL <https://stpetersengineeringcollege-6c-dev-ed.lightning.force.com/lightning/setup/CustomTabs/home>. The left sidebar is collapsed, and the main content area is titled "Custom Tabs". It includes sections for "Custom Object Tabs", "Web Tabs", "Visualforce Tabs", and "Lightning Component Tabs". Under "Custom Object Tabs", there is a table with four rows:

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

Below the table, there are sections for "Web Tabs" (No Web Tabs have been defined), "Visualforce Tabs" (No Visualforce Tabs have been defined), and "Lightning Component Tabs" (No Lightning Component Tabs have been defined). The status bar at the bottom shows the weather as 28°C Haze, system icons, and the date/time as 24-12-2024 15:29.

### 4. Creating Lightning App

- Steps to create a Lightning app for the CRM application.

### 5. Creating Fields

- Number fields: Track quantities and prices.
- Rollup Summary Fields: Summarize data from child to parent objects.
- Cross-Object Formula Fields: Calculate total amounts.
- Validation Rules: Ensure data integrity.

## 6. Creating Page Layouts

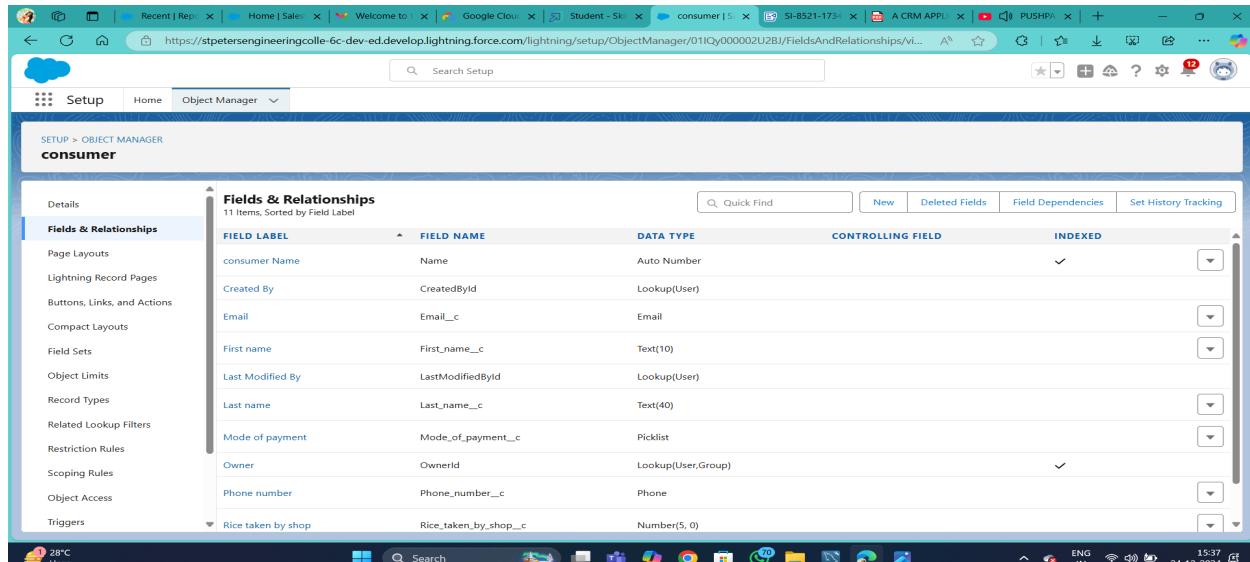
- Customize page layouts for each object to enhance user experience.

The screenshot shows the Salesforce Setup interface for creating a page layout. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The 'Page Layouts' section is selected. The main area shows the 'Layout Properties' for the 'consumer' object. A table displays field mappings between the consumer object and a target object (labeled 'rice mill name'). Below the table, a preview window shows the layout structure with sections for 'rice details', 'Personal details', and 'Receipt details'. The preview includes sample data for fields like 'Rice type', 'Consumer Name', and 'Mode of payment'.

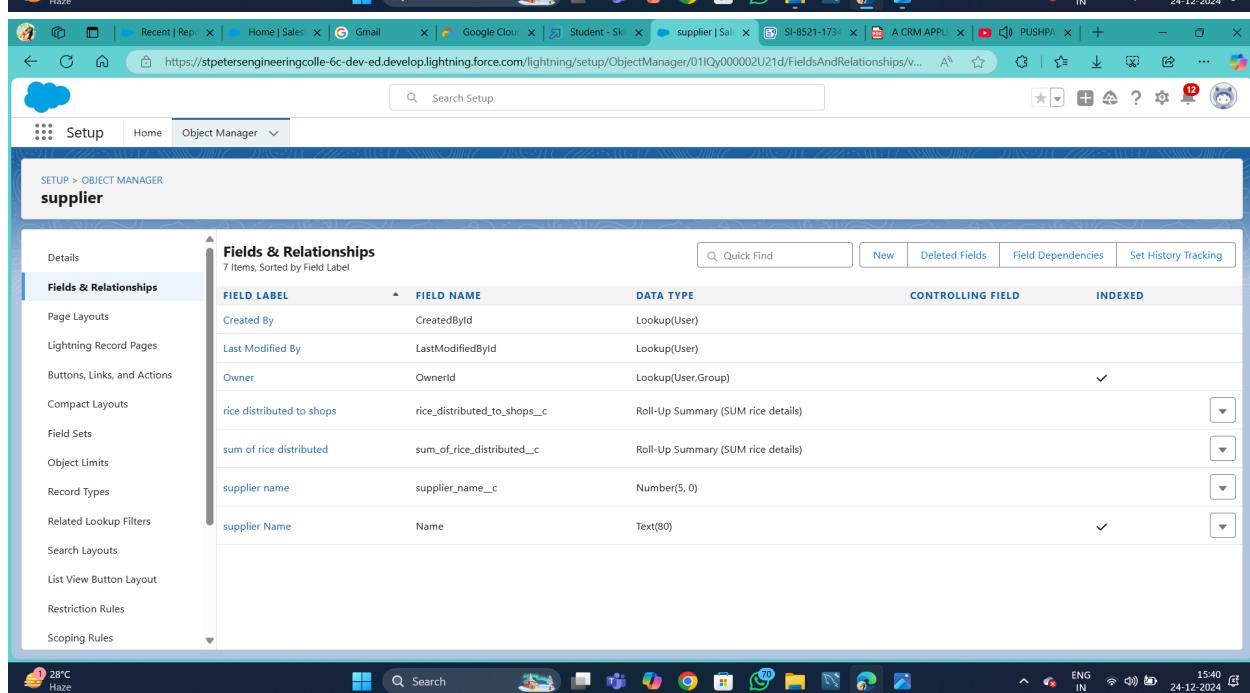
The screenshot shows the Lightning App Builder interface for configuring app branding. The left sidebar has sections for App Settings, App Details & Branding, App Options, Utility Items (Desktop Only), Navigation Items, and User Profiles. The 'App Details & Branding' section is active. It contains fields for 'App Name' (set to 'MY RICE'), 'Developer Name' (set to 'MY\_RICE'), and 'Description' (with placeholder 'Enter a description...'). It also includes 'App Branding' options where an image of rice is uploaded and a primary color hex value (#0070D2) is selected. Below these, there are 'Org Theme Options' and a preview of the app launcher.

## 7.Creating fields for the objects:

- Define profiles to control user permissions.
- Create roles and set up a role hierarchy to establish data access levels.



The screenshot shows the Salesforce Object Manager interface for the 'consumer' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays a table titled 'Fields & Relationships' with 11 items. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: consumer Name (Name, Auto Number), Created By (CreatedBy, Lookup(User)), Email (Email\_c, Email), First name (First\_name\_c, Text(10)), Last Modified By (LastModifiedBy, Lookup(User)), Last name (Last\_name\_c, Text(40)), Mode of payment (Mode\_of\_payment\_c, Picklist), Owner (OwnerId, Lookup(User,Group)), Phone number (Phone\_number\_c, Phone), and Rice taken by shop (Rice\_taken\_by\_shop\_c, Number(5, 0)).

The screenshot shows the Salesforce Object Manager interface for the 'supplier' object. The left sidebar lists various setup options. The main area displays a table titled 'Fields & Relationships' with 7 items. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (CreatedBy, Lookup(User)), Last Modified By (LastModifiedBy, Lookup(User)), Owner (OwnerId, Lookup(User,Group)), rice distributed to shops (rice\_distributed\_to\_shops\_c, Roll-Up Summary (SUM rice details)), sum of rice distributed (sum\_of\_rice\_distributed\_c, Roll-Up Summary (SUM rice details)), supplier name (supplier\_name\_c, Number(5, 0)), and supplier Name (Name, Text(80)).

- Add users to the Salesforce organization and assign appropriate profiles and roles.

Recent | Rep X Home | Sales X Gmail X Google Cloud X Student - Sk X rice mill | Sal X SI-8521-173 X A CRM APPL X PUSHPI X + - X

https://stpetersengineeringcollege-6c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Qy000002U24r/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER  
rice mill

Fields & Relationships

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 Name	Name	Auto Number		✓

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

28°C Haze ENG IN 15:40 24-12-2024

Recent | Rep X Home | Sales X Gmail X Google Cloud X Student - Sk X rice details X SI-8521-173 X A CRM APPL X PUSHPI X + - X

https://stpetersengineeringcollege-6c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Qy000002U2Cv/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER  
rice details

Fields & Relationships

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_c	Number(5, 0)		✓
rice mill	rice_mill_c	Master-Detail(rice mill)		✓
supplier name	supplier_name_c	Master-Detail(supplier)		✓

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

28°C Haze ENG IN 15:41 24-12-2024

## 8.validation rules:

- Define permission sets to grant additional permissions to users beyond their profiles.

The screenshot shows the Salesforce Lightning interface for the 'consumer' object. The top navigation bar includes links for Recent, Home, Sales, Gmail, Google Cloud, Student - Skills, consumer, SI-8521-1734, A CRM APPLI, Pushpa, and a plus sign. The main header displays the URL https://stpetersengineeringcollege-6c-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lQy0000002U2B/ValidationRules/view. The page title is 'SETUP > OBJECT MANAGER consumer'. On the left, a sidebar lists various setup categories: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, and Triggers. The main content area is titled 'Validation Rules' and shows one item: '1 Items, Sorted by Rule Name'. A table lists the validation rule details:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Phonenumberoremailblankrule	Top of Page	please fill phone number	✓	D Kaveri, 24/12/2024, 3:57 pm

The bottom of the screen shows the Windows taskbar with icons for Finance headline, Search, File Explorer, Google Chrome, Microsoft Edge, WhatsApp, and others, along with system status indicators like battery level, signal strength, and date/time (24-12-2024, 15:57).

## 9.page Layout

The screenshot shows the Salesforce Lightning setup interface for managing page layouts. The URL in the browser is <https://stpetersengineeringcollege-6c-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lQy000002U2B/PageLayouts/view>. The page title is "consumer".

The left sidebar menu is expanded, showing the "Page Layouts" section selected under "Object Manager". Other options include Details, Fields & Relationships, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, and Triggers.

The main content area displays the "Page Layouts" list:

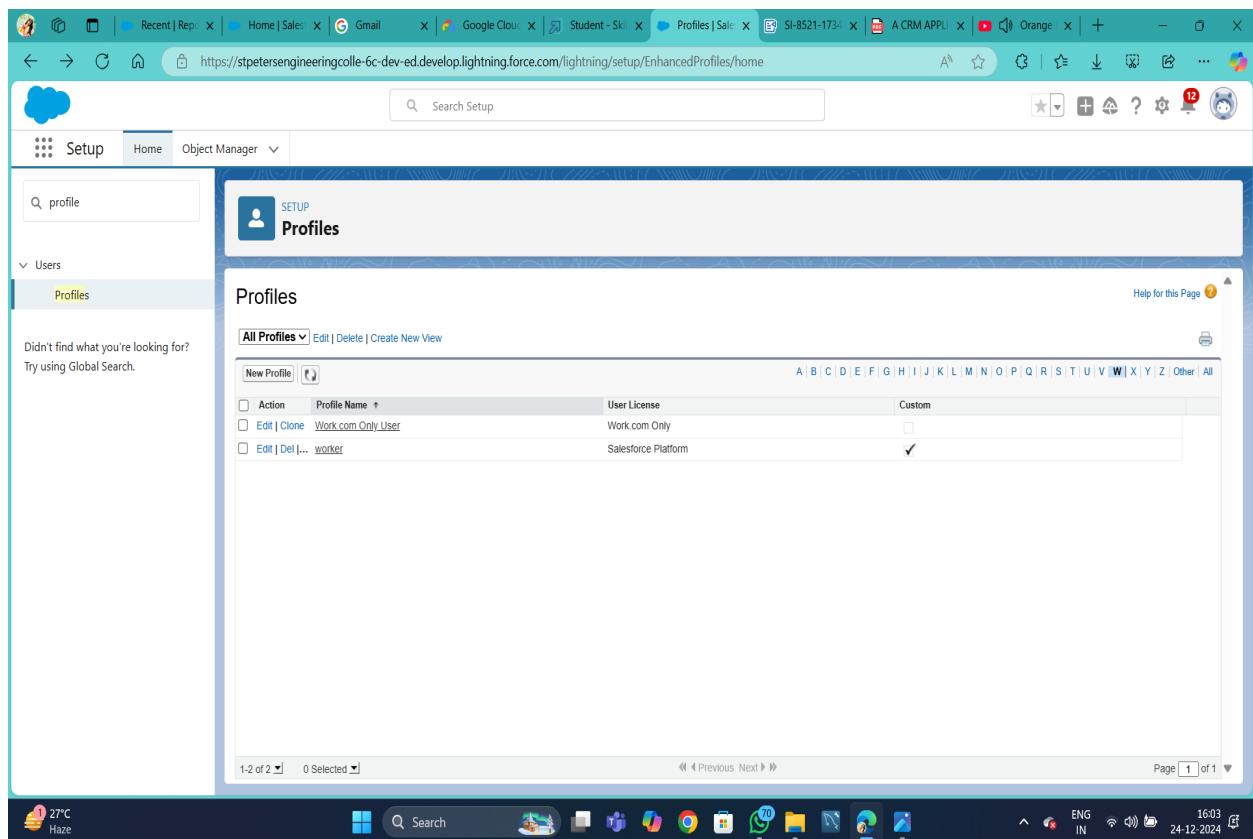
PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
consumer Layout	D Kaveri, 21/12/2024, 1:58 pm	D Kaveri, 24/12/2024, 12:32 pm
personal details	D Kaveri, 24/12/2024, 11:42 am	D Kaveri, 24/12/2024, 11:42 am

At the top right of the main content area, there are "Quick Find", "New", and "Page Layout Assignment" buttons. The status bar at the bottom of the screen shows various system icons and the date/time: 15:58, 24-12-2024.

## 10. Profile Creations

The image displays three separate screenshots of the Salesforce Setup Profiles page, each showing a different list of user profiles:

- Screenshot 1:** Shows a list of 44 profiles. The profiles listed include: Chatter Moderator User, Contract Manager, Cross Org Data Proxy User, Custom:Marketing Profile, Custom:Sales Profile, Custom:Support Profile, Customer Community Login User, Customer Community Plus Login User, Customer Community Plus User, Customer Community User, Customer Portal Manager Custom, Customer Portal Manager Standard, Employee, External Apps Login User, and External Identity User.
- Screenshot 2:** Shows a list of 1 profile. The profile listed is owner, which has a User License of Salesforce and is marked as Custom.
- Screenshot 3:** Shows a list of 1 profile. The profile listed is owner, which has a User License of Salesforce and is marked as Custom.



Recent | Rep X Home | Sales X Gmail X Google Cloud X Student - Sk X Profiles | Sale X SI-8521-173 X A CRM APPL X Orange X + - \_ X

https://stpetersengineeringcollege-6c-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/home

Setup Home Object Manager

Search Setup

Profile

Users Profiles

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

Profiles

All Profiles Edit Delete Create New View

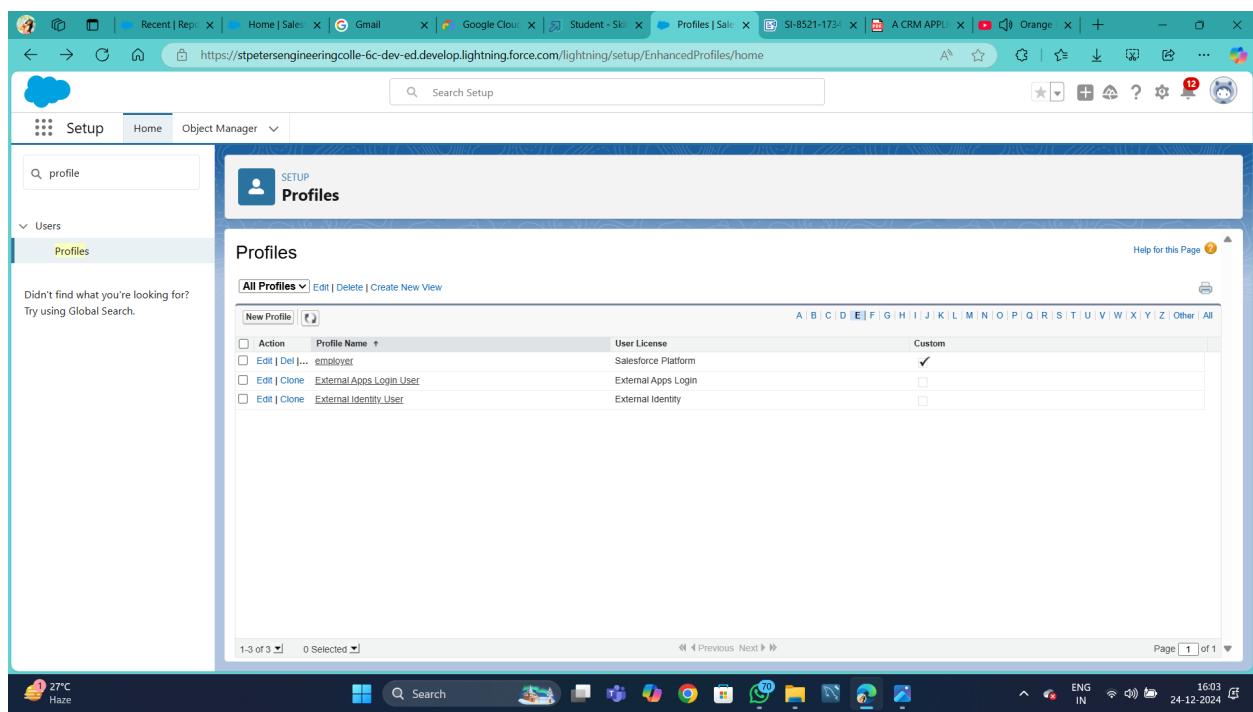
New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Work.com Only User	Work.com Only	<input type="checkbox"/>
<input type="checkbox"/> Edit   Del ...	worker	Salesforce Platform	<input checked="" type="checkbox"/>

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

1-2 of 2 0 Selected Page 1 of 1

27°C Haze Search ENG IN 16:03 24-12-2024



Recent | Rep X Home | Sales X Gmail X Google Cloud X Student - Sk X Profiles | Sale X SI-8521-173 X A CRM APPL X Orange X + - \_ X

https://stpetersengineeringcollege-6c-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/home

Setup Home Object Manager

Search Setup

Profile

Users Profiles

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

Profiles

All Profiles Edit Delete Create New View

New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Del ...	employee	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	External Apps Login User	External Apps Login	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	External Identity User	External Identity	<input type="checkbox"/>

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

1-3 of 3 0 Selected Page 1 of 1

27°C Haze Search ENG IN 16:03 24-12-2024

## 11.Roles

The screenshot shows the Salesforce Lightning interface for managing roles. The top navigation bar includes links for Recent, Home, Sales, Gmail, Google Cloud, Student - Skills, Roles, Sales, SI-8521-1734, A CRM APPLI, Orange, and several others. The browser address bar shows the URL <https://stpetersengineeringcollege-6c-dev-ed.lightning.force.com/lightning/setup/Roles/home>.

The page title is "Roles". The left sidebar, under the "Users" section, lists categories: Feature Settings, Sales, Service, Case Teams, and Didn't find what you're looking for? Try using Global Search. The "Roles" category is currently selected.

The main content area displays the "Creating the Role Hierarchy" page. It features a search bar at the top right and a "Help for this Page" link. Below the search bar, there's a "Your Organization's Role Hierarchy" tree view. The hierarchy starts with "ST PETERS ENGINEERING COLLEGE student", which has children "CEO", "CFO", "COO", "owner", "employer", "SVP\_Customer Service & Support", "SVP\_Human Resources", and "SVP\_Sales & Marketing". Each node has "Edit | Del | Assign" options. A "Show in tree view" dropdown is located to the right of the tree.

The bottom of the screen shows the Windows taskbar with icons for File Explorer, Edge, Google Chrome, WhatsApp, and other applications. The system tray indicates a battery level of 70%, ENG IN, and the date/time 24-12-2024 16:05.

## 12. Users

The screenshot shows the Salesforce Lightning interface for managing users. The top navigation bar includes links for Recent, Home, Sales, Gmail, Google Cloud, Student - Skill, Users, SI-8521-1734, A CRM APPLI, Orange, and several others. The URL in the address bar is https://stpetersengineeringcollege-6c-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home.

The main header features a blue cloud icon, a search bar with placeholder "Search Setup", and a toolbar with various icons including a star, a plus sign, a question mark, and a bell with a notification count of 12.

The left sidebar has a "Setup" tab selected, followed by Home and Object Manager. Under the "Users" section, there are links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and a "Users" link which is currently selected. Other collapsed sections include Feature Settings, Data.com, and a Prospectors section.

The main content area is titled "All Users". It displays a message about creating, viewing, and managing users, and a note about getting more licenses via the Your Account app. It includes a "View" dropdown set to "All Users", "Edit", and "Create New View" buttons, and a navigation bar with letters A through Z and an "All" button.

A table lists the users:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00dgy00000hgrhsma.zomlvxgowsky1@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Godugu_Naresh	nani	naresh@nani.com	worker	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Kaveri_D	DKave	kaveri@salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	ram_ram	ram	kaveri@gmail.com	employer	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	User_Integration	integ	integration@00dgy00000hgrhsma.zom		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00dgy00000hgrhsma.zom		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>	y_vicky	yy	kaveri@15.com	owner	<input checked="" type="checkbox"/>	owner

At the bottom, there are "New User", "Reset Password(s)", and "Add Multiple Users" buttons, along with another navigation bar for letters A through Z and an "All" button.

The system tray at the bottom shows weather (27°C Haze), a search bar, and various application icons. The status bar indicates ENG IN, a battery level of 70%, and the date/time 24-12-2024 16:06.

## 13.Sharing Settings

The screenshot shows the Salesforce Sharing Settings page. The URL in the browser is <https://stpetersengineeringcollege-6c-dev-ed.lightning.force.com/lightning/setup/SecuritySharing/home>. The page title is "Sharing Settings".

The left sidebar has a search bar and a "Sharing Settings" section under "Sharing". A message says "Didn't find what you're looking for? Try using Global Search.".

The main content area displays a table of sharing settings:

Object	Sharing Type	Access Level	Controlled By
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
consumer	Public Read/Write	Private	✓
rice details	Controlled by Parent	Controlled by Parent	
rice mill	Public Read Only	Private	✓
supplier	Public Read Only	Private	✓

Below the table is an "Other Settings" section with checkboxes for Manager Groups, Secure guest user record access, and Require permission to view record names in lookup fields.

The bottom section is titled "Sharing Rules" and contains a "Lead Sharing Rules" table with a "New" button and a "Recalculate" button. It displays the message "No sharing rules specified."

The bottom navigation bar includes icons for search, file, and other applications, along with system status indicators like weather (27°C Haze), language (ENG IN), date (24-12-2024), and time (16:08).

## 14.Application its Outputs and codes

The screenshot shows a web browser window with a list of suppliers. The URL is [https://stpetersengineeringcollege-6c-dev-ed.lightning.force.com/lightning/o/supplier\\_c/list?filterName=\\_Recent](https://stpetersengineeringcollege-6c-dev-ed.lightning.force.com/lightning/o/supplier_c/list?filterName=_Recent). The page title is "MY RICE". The left sidebar has links for "suppliers", "rice details", "rice mills", "consumers", and "Reports". The main content area shows a "Recently Viewed" section with 9 items, all updated a few seconds ago. The list is as follows:

Index	Supplier Name
1	Mr.Vignesh
2	Mr.Tirnesh
3	Mr.Rakesh
4	Mr.Kalesh
5	Mr.Umesh
6	Mr.Yogesh
7	Mr.Mahesh
8	Mr.Suresh
9	Mr.Naresh

The screenshot shows a web browser window with a list of rice details. The URL is [https://stpetersengineeringcollege-6c-dev-ed.lightning.force.com/lightning/o/rice\\_details\\_c/list?filterName=\\_Recent](https://stpetersengineeringcollege-6c-dev-ed.lightning.force.com/lightning/o/rice_details_c/list?filterName=_Recent). The page title is "MY RICE". The left sidebar has links for "suppliers", "rice details", "rice mills", "consumers", and "Reports". The main content area shows a "Recently Viewed" section with 5 items, all updated a few seconds ago. The list is as follows:

Index	Rice Details Name
1	rice-005
2	rice-004
3	rice-003
4	rice-002
5	rice-001

https://stpetersengineeringcollege-6c-dev-ed.develop.lightning.force.com/lightning/o/rice\_mill\_\_c/list?filterName=\_Recent

MY RICE

Recently Viewed

5 items • Updated a few seconds ago

	rice Name
1	rice-005
2	rice-004
3	rice-003
4	rice-002
5	rice-001

27°C Haze

Search

ENG IN 24-12-2024

https://stpetersengineeringcollege-6c-dev-ed.develop.lightning.force.com/lightning/o/consumer\_c/list?filterName=\_Recent

MY RICE

Recently Viewed

4 items • Updated a few seconds ago

	consumer Name
1	consumers-004
2	consumers-003
3	consumers-002
4	consumers-001

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- Create detailed reports to track rice production, sales, and other key metrics.

The screenshot shows a Salesforce Lightning report titled "range of amount per day". The report details rice purchases from three different shops. The data is presented in a table with columns for Rice taken by shop, Consumer Name, Rice type, rice price/kg, Mode of payment, and Amount Paid.

Rice taken by shop	Consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
3 (1)	DKaveri	basmati	40	upi	30.00
<b>Subtotal</b>			40		30.00
5 (1)	NaniNaresh	basmati	60	card	25.00
<b>Subtotal</b>			60		25.00
7 (1)	MrSuresh	normal rice	40	network banking	70.00
<b>Subtotal</b>			40		70.00
<b>Total (3)</b>			100		125.00

Row Counts: 3. Total rice price/kg: 100. Total Amount Paid: 125.00.

- Design dashboards to provide visual summaries of key metrics and reports.

The screenshot shows a Salesforce dashboard titled "estimated data". The dashboard displays two charts: a bar chart titled "range of amount per day" and a gauge chart titled "range of amount per day".

**Bar Chart Data:**

Rice taken by shop	Sum of Amount Paid
3	30
5	25
7	70

**Gauge Chart Data:**

Rice taken by shop	Sum of rice price/kg
3	40
5	60
7	100

As of 27-Dec-2024, 11:23 am Viewing as D Kaveri

Developer Console - Personal - Microsoft Edge

https://stpetersengineeringcole-6c-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage

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

ConsumerRecord.apxc consumerTrigger.apxt \* [x]

Code Coverage: None ▾ API Version: 62 ▾ 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 us. Please continue y
! 9           "We are proud to associate with valuable customers like you and we look forward to collaborating with you
! 10          +'So why taking a step back, take a leap of faith and shop with us more, while we provide with the valuable
! 11          'Thankyou for buying ' + '' +'Here are some of the products that are brought by the customers who similarly
12          Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
13
14    }
15  }
16 }
```

Logs, Tests, and Problems [x]

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https://stpetersengineeringcole-6c-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage

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ConsumerRecord.apxc consumerTrigger.apxt \* [x]

Code Coverage: None ▾ API Version: 62 ▾ Go To

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

Logs, Tests, and Problems [x]

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# What I Gained from the Project

Building the Rice Mill CRM Application has been an incredible journey for me. Here's a summary of what I've accomplished and learned through this project:

- 1. Hands-On Salesforce Experience:** By working on this real-time Salesforce project, I've gained valuable experience in configuring and customizing CRM applications. I've navigated the Salesforce platform to build a functional CRM system tailored to the needs of a rice mill, which involved setting up various components like objects, fields, and relationships.
- 2. Understanding Objects & Relationships:** I've delved into how Salesforce objects and relationships work, learning to create and manage custom objects like Suppliers, Rice Mills, Consumers, and Rice Details. Understanding how these objects interrelate has been key to building a coherent and effective CRM system.
- 3. Developing Formula Fields and Validation Rules:** I've crafted formula fields to perform essential calculations and validate data. For instance, I created formulas to calculate the total payment due based on the quantity of rice and its price per kilogram. Validation rules have been implemented to ensure data integrity, such as preventing records with missing or incorrect information from being saved.
- 4. Applying Cross-Object Formula Fields:** I've used cross-object formula fields to link data across different Salesforce objects. This functionality has allowed me to pull information from related records and perform calculations, such as aggregating the total amount of rice purchased by each consumer and displaying it in a single view.
- 5. Designing Page Layouts:** I've designed and customized page layouts to make the CRM application user-friendly. This included arranging fields and sections in a way that makes it easy for users to access and manage their data, whether they are viewing details about rice purchases or reviewing supplier information.
- 6. Using Rollup Summary Fields:** I've implemented rollup summary fields to aggregate data from child records and display it on parent records. For example, I used rollup summaries to show the total amount of rice supplied by each supplier, which helps in tracking and managing inventory efficiently.
- 7. Creating Reports and Dashboards:** I've developed and customized reports and dashboards to visualize key metrics and insights. I set up reports to track daily rice sales, total income, and popular rice types, and created dashboards to provide an at-a-glance view of these metrics, aiding in better decision-making and resource planning.

Overall, this project has significantly enhanced my Salesforce skills and provided me with a practical tool that improves the management and efficiency of rice mill operations. I'm proud of the progress I've made and excited about the positive impact this CRM application will have on the business.

## Future Enhancements

Looking ahead, there are several exciting ways to take the Rice Mill CRM Application to the next level. Here's what I'm envisioning:

- 1. Advanced Reporting Capabilities:** I see the potential for diving even deeper into the data. Adding features like custom report filters, scheduled email updates, and interactive dashboards could really help users get a better handle on their rice sales and customer trends. Imagine being able to see detailed sales patterns over time or receive automatic reports on key metrics—this could make decision-making a lot smoother.
- 2. Integration with External Systems:** To make things even more seamless, integrating with external systems such as accounting software or inventory tools could be a game changer. This would help eliminate the need for manual data entry and ensure that everything from financial records to inventory levels is always in sync.
- 3. Enhanced User Interface and Experience:** I'm excited about the possibility of making the user experience even better. Improving the interface to be more intuitive, adding customizable dashboard widgets, and ensuring the design works well on mobile devices could make interacting with the CRM more enjoyable and efficient for everyone.
- 4. Automated Workflows and Notifications:** Introducing automated workflows and notifications could really streamline operations. For instance, setting up automatic reminders for things like payment deadlines or inventory restocking could help keep everything running smoothly and reduce the chances of missing important tasks.
- 5. Integration of AI and Analytics:** The future holds exciting possibilities with AI and advanced analytics. By incorporating tools that predict trends, spot potential issues, or analyze customer behavior, we could make even more informed decisions and stay ahead of changes in the market.
- 6. Expanded User Training and Support:** Finally, making sure everyone can use the CRM to its fullest is important. Providing detailed user guides, video tutorials, and a support helpdesk would be great ways to ensure that everyone feels confident and supported as they use the application. These enhancements are all about making the CRM application even more powerful and user friendly. I'm looking forward to seeing how these updates can further improve

the way the rice mill operates and helps the business grow.

## **Conclusion:**

The CRM application successfully streamlines daily operations in the rice mill, enhancing efficiency and customer satisfaction. Future enhancements could include integrating the application with external systems for broader functionality.

Reflecting on the development of the Rice Mill CRM Application, I'm truly pleased with what I've accomplished. This project has been a significant learning experience, allowing me to apply and enhance my Salesforce skills in a real-world context.

By building this CRM system, I've gained hands-on experience with Salesforce's powerful features, such as object creation, formula fields, and validation rules. I've also explored how to design user-friendly page layouts and utilize rollup summary fields to streamline data management. Creating customized reports and dashboards has enabled me to visualize key metrics and provide valuable insights.

Looking ahead, I'm excited about the possibilities for future enhancements. From adding advanced reporting capabilities and integrating with external systems to improving the user interface and incorporating AI-driven analytics, there's a lot of potential to further elevate the CRM application. I'm also eager to enhance data security measures and expand user training and support to ensure the CRM continues to meet the evolving needs of the rice mill.

Overall, this project has not only improved my technical skills but also resulted in a practical tool that can make a real difference in managing rice mill operations. I'm proud of what I've achieved and optimistic about the continued growth and impact of this CRM application.

## **References:**

- Salesforce Documentation
- Community Forums