

Project Title: A CRM Application for Wholesale Rice Mill

1. Project Overview:

This project focuses on developing a Salesforce-based CRM application tailored for wholesale rice mills. The primary objective is to streamline business operations, improve customer relationship management, and optimize sales processes. By leveraging Salesforce's capabilities, we aim to enhance operational efficiency, provide a seamless user experience, and ensure accurate data management. This project supports the long-term goals of increasing market reach, improving customer satisfaction, and enabling data-driven decision-making for wholesale rice mills.

2. Objectives:

Business Goals:

- Streamline the sales and order management processes.
- Enhance customer relationship management by providing detailed insights into customer interactions.
- Improve inventory tracking and order fulfillment efficiency.
- Facilitate seamless communication between sales teams and clients.
- Increase overall operational transparency and efficiency.

Specific Outcomes:

- Develop a centralized database for managing customer information, orders, and inventory.
- Create custom Salesforce workflows to automate routine tasks.
- Implement dashboards and reports for real-time analytics.
- Enable mobile access for on-the-go CRM functionalities.

3. Salesforce Key Features and Concepts Utilized

- Sales Cloud: To manage leads, opportunities, and sales pipelines.
- Custom Objects: For managing rice inventory, orders, and supplier details.

OBJECTS:

projectcom69-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000003ebS9/Details/view

Search Setup

Star

Plus

Shield

Help

Settings

12

Avatar

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

Details

Description

API Name
supplier_c

Custom
✓

Singular Label
supplier

Plural Label
suppliers

Enable Reports
✓

Track Activities

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

EditDelete

projectcom69-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000003ebjt/Details/view

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rice mill

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Record Types

Related Lookup Filters

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

EditDelete

projectcom69-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011dL000003ebIV/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

consumer

Details
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Related Lookup Filters

Details

Edit Delete

Description

API Name
consumer__c

Custom
✓

Singular Label
consumer

Plural Label
consumers

Enable Reports
✓

Track Activities

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

projectcom69-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011dL000003eboj/Details/view

Search Setup

Setup Home Object Manager

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rice details

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Compact Layouts
Field Sets
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Record Types
Related Lookup Filters

Details

Edit Delete

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

TABS:

projectcom69-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

Search Setup

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Plus

Alert

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Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP

Tabs

Custom Tabs

Help for this Page

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

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

Custom Object Tabs

New

What Is This?

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

Web Tabs

New

What Is This?

CREATE A LIGHTNING APP:

projectcom69-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Star Plus Help Settings 12 Profile

Setup Home Object Manager

app manager

Apps

App Manager

External Client Apps

External Client App Manager

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

SETUP Lightning Experience App Manager

New Lightning App New Connected App

24 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...	
8	Content	Content	Salesforce CRM Content	25/12/2024, 9:17 am	Classic	✓	
9	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, ...	25/12/2024, 9:17 am	Lightning	✓	
10	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	25/12/2024, 9:17 am	Lightning	✓	
11	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning E...	25/12/2024, 9:17 am	Lightning	✓	
12	Marketing CRM Cla...	Marketing	Track sales and marketing efforts with CRM objec...	25/12/2024, 9:17 am	Classic	✓	
13	MY RICE	MY_RICE		25/12/2024, 11:27 ...	Lightning	✓	
14	Platform	Platform	The fundamental Lightning Platform	25/12/2024, 9:17 am	Classic		
15	Queue Management	QueueManagement	Create and manage queues for your business.	25/12/2024, 9:17 am	Lightning	✓	
16	Sales	Sales	The world's most popular sales force automation ...	25/12/2024, 9:17 am	Classic		
17	Sales	LightningSales	Manage your sales process with accounts, leads, ...	25/12/2024, 9:17 am	Lightning		

FIELDS:

Setup

Home

Object Manager

Q

Search Setup

SETUP > OBJECT MANAGER

rice details

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Buttons, Links, and Actions

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Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

rice details Custom Field

rice distributed

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 distributed

Object Name

rice details

Field Name

rice_distributed

Data Type

Number

API Name

rice_distributed__c

Description

Help Text

Data Owner

Field Usage

Data Sensitivity Level

Compliance Categorization

Created By

MOYVI PRASHANTI

25/12/2024, 11:29 am

Modified By

MOYVI PRASHANTI

25/12/2024, 11:29 am

General Options

Required

☐

Unique

☐

External ID

☐

AI Prediction

☐

Default Value

Number Options

Length

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Decimal Places

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SETUP > OBJECT MANAGER

rice details

Details

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Restriction Rules

Scoping Rules

Object Access

rice details Custom Field

supplier Name

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

supplier Name

Object Name

rice details

Field Name

supplier_Name

Data Type

Master-Detail

API Name

supplier_Name__c

Description

Help Text

Data Owner

Field Usage

Data Sensitivity Level

Compliance Categorization

Created By

MOYVI PRASHANTI

25/12/2024, 11:31 am

Modified By

MOYVI PRASHANTI

25/12/2024, 11:58 am

Master-Detail Options

Related To

supplier

Child Relationship Name

rice_details

Related List Label

rice details

Sharing Setting

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

Reparentable Master Detail

☐

Lookup Filter

No lookup filters defined.

Validation Rules

New

1

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Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

rice mill

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Restriction Rules

Scoping Rules

Object Access

rice mill Custom Field

rice distributed to shops

Back to rice mill

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	rice distributed to shops	Object Name	rice mill
Field Name	rice_distributed_to_shops		
API Name	rice_distributed_to_shops__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MOYYI PRASHANTI, 25/12/2024, 11:37 am	Modified By	MOYYI PRASHANTI, 25/12/2024, 11:37 am

Roll-Up Summary Options

Data Type	Roll-Up Summary	Summary Type	SUM
Summarized Object	rice_details		
Field to Aggregate	rice_details.rice_distributed		
Filter Criteria			

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

rice mill

Details

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Restriction Rules

Scoping Rules

Object Access

rice mill Custom Field

rice taken

Back to rice mill

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	rice taken	Object Name	rice mill
Field Name	rice_taken		
API Name	rice_taken__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MOYYI PRASHANTI, 25/12/2024, 11:46 am	Modified By	MOYYI PRASHANTI, 25/12/2024, 11:46 am

Roll-Up Summary Options

Data Type	Roll-Up Summary	Summary Type	SUM
Summarized Object	consumer		
Field to Aggregate	consumer.rice_taken_in_shops		
Filter Criteria			

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

rice details

Details

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Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

rice details Custom Field

supplier Name

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	supplier Name	Object Name	rice_details
Field Name	supplier_Name	Data Type	Master-Detail
API Name	supplier_Name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MOYYI PRASHANTI	Modified By	MOYYI PRASHANTI
	25/12/2024, 11:31 am		25/12/2024, 11:58 am

Master-Detail Options

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

Lookup Filter

No lookup filters defined.

Validation Rules

New

Help for this Page

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rice mill

Details

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Scoping Rules

Object Access

rice mill Custom Field

rice price/kg

Back to rice mill

Validation Rules

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	rice price/kg	Object Name	rice_mill
Field Name	rice_price_kg	Data Type	Number
API Name	rice_price_kg__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MOYYI PRASHANTI	Modified By	MOYYI PRASHANTI
	25/12/2024, 12:02 pm		25/12/2024, 12:02 pm

General Options

Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
AI Prediction	<input type="checkbox"/>
Default Value	

Number Options

Length	5
Decimal Places	0

Help for this Page

PAGE LAYOUTS:

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

consumer

Details

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Page Layouts

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Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

SaveQuick SavePreview As...CancelUndoRedoLayout Properties

Fields

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Quick Find

Field Name

SectionConsumer NameLast Modified Byrice mill nameRice type

Blank SpaceCreated ByLast nameRice taken by shops

Amount PaidemailMode of paymentrice taken by sh...

consumer NameFirst namePhone numberrice taken in shops

consumer Detail

Standard Buttons

EditDeleteCloneChange OwnerChange Record TypePrintable ViewEdit Labels

Custom Buttons

Information (header visible on edit only)

consumer NameGEN-2004-001234

rice taken by shops in kg31.716

rice taken in shops6,346

Personal details

First nameSample Text

Last nameSample Text

Consumer NameSample Text

Phone number1-415-555-1212

emailsarah.sample@company.com

rice mill nameSample Text

rice details

Rice taken by shops87.416

Rice typeSample Text

Receipt details

Mode of paymentSample Text

Amount Paid964.94

System Information (header visible on edit only)

Created BySample Text

Last Modified BySample Text

Custom Links (header visible on edit only)

PROFILES:

OWNER PROFILE:

Setup

Home

Object Manager

profiles

Users

Profiles

Didn't find what you're looking for?

Try using Global Search.

owner

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

Enabled Apex Class Access

Enabled Visualforce Page Access

Enabled External Data Source Access

Enabled Named Credential Access

Enabled External Credential Principal Access

Enabled Custom Metadata Type Access

Enabled Custom Settings Definitions Access

Enabled Flow Access

Enabled Service Presence Status Access

Enabled Custom Permissions

Profile Detail

Edit

Clone

Delete

View Users

Name	owner	
User License	Salesforce	Custom Profile <input checked="" type="checkbox"/>
Description		
Created By	MOYVI PRASHANTI	25/12/2024, 12:39 pm
Modified By	MOYVI PRASHANTI	25/12/2024, 12:43 pm

Page Layouts

Standard Object Layouts

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

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
consumers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
rice details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
rice mills	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
suppliers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

EMPLOYER PROFILE:

Setup

Home

Object Manager

profiles

Users

Profiles

Didn't find what you're looking for?

Try using Global Search.

employer

employer

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges

Enabled Apex Class Access

Enabled Visualforce Page Access

Enabled External Data Source Access

Enabled Named Credential Access

Enabled External Credential Principal Access

Enabled Custom Metadata Type Access

Enabled Custom Settings Definitions Access

Enabled Flow Access

Enabled Service Presence Status Access

Enabled Custom Permissions

Profile Detail

Edit

Clone

Delete

View Users

Name	employer	
User License	Salesforce Platform	Custom Profile <input checked="" type="checkbox"/>
Description		
Created By	MOYVI PRASHANTI	25/12/2024, 12:44 pm
Modified By	MOYVI PRASHANTI	25/12/2024, 12:47 pm

Page Layouts

Standard Object Layouts

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

WORKER PROFILE:

Custom Object Permissions													
	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
consumers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	rice mills	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
rice details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	suppliers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ROLE AND ROLE HIERARCHY:

The screenshot displays the Salesforce Setup interface for the 'Roles' section. The left sidebar contains a navigation menu with 'Setup' at the top, followed by 'Home' and 'Object Manager'. Below these are sections for 'Users', 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The 'Roles' link is highlighted under 'Users'. The main content area is titled 'Roles' and includes a search bar at the top. Below the search bar, there is a section titled 'Your Organization's Role Hierarchy' with a 'Show in tree view' dropdown. The hierarchy is a tree structure starting with 'salesforce' at the root. It branches into 'CEO', 'CFO', 'COO', 'owner', 'employer', 'worker', 'SVP_Customer Service & Support', 'Customer Support International', 'Customer Support North America', 'Installation & Repair Services', 'SVP_Human Resources', and 'SVP_Sales & Marketing'. Each role in the hierarchy has an 'Add Role' link next to it. The 'Add Role' link is highlighted in yellow for 'CEO', 'CFO', 'COO', 'owner', 'employer', 'worker', 'SVP_Customer Service & Support', 'Customer Support International', 'Customer Support North America', 'Installation & Repair Services', 'SVP_Human Resources', and 'SVP_Sales & Marketing'. The 'Add Role' link is also highlighted in yellow for 'salesforce'.

Setup Roles

Search Setup

Setup Roles

Users

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

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

SETUP Roles

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Collapse All Expand All

salesforce

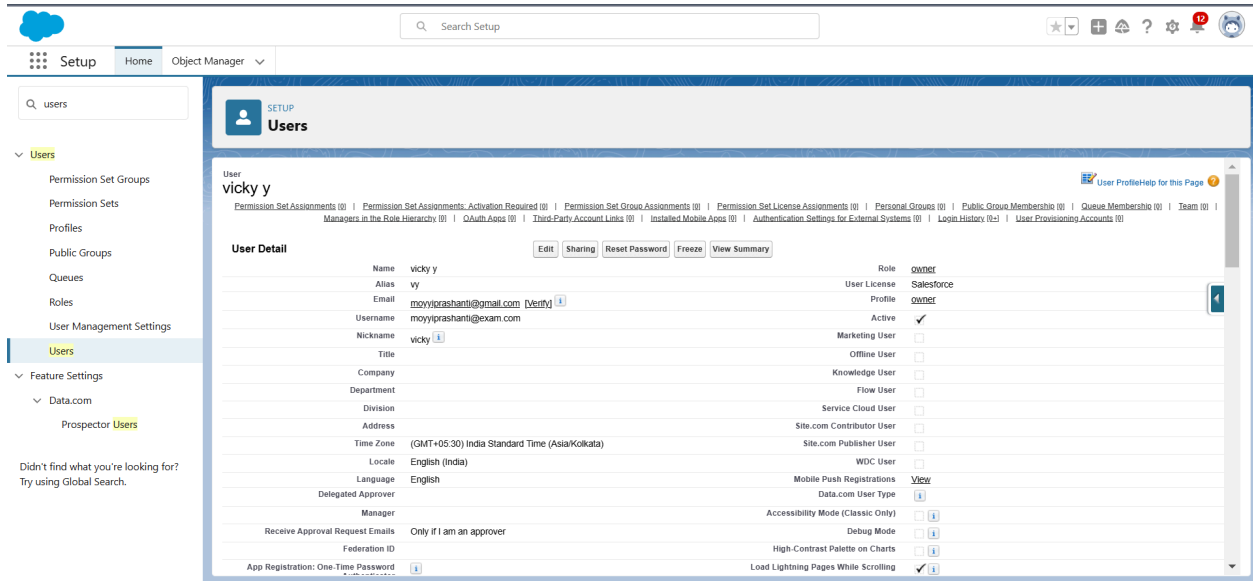
- CEO Edit | Del | Assign
- CFO Edit | Del | Assign
- COO Edit | Del | Assign
- owner Edit | Del | Assign
- employer Edit | Del | Assign
- worker Edit | Del | Assign
- SVP_Customer Service & Support Edit | Del | Assign
- Customer Support International Edit | Del | Assign
- Customer Support North America Edit | Del | Assign
- Installation & Repair Services Edit | Del | Assign
- SVP_Human Resources Edit | Del | Assign
- SVP_Sales & Marketing Edit | Del | Assign

USERS:

1.VICKY

2.RAM

3.RAGU RAJ



The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area displays the 'User Detail' for 'vicky y'. The user's email is moyiprashanti@gmail.com, and the nickname is vicky. The user is active and has the role of 'owner'. The user's profile is 'owner'. The user's manager is 'Only if I am an approver'. The user's time zone is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The user's locale is 'English (India)'. The user's language is 'English'. The user's delegated approver is 'Only if I am an approver'. The user's receive approval request emails are 'Only if I am an approver'. The user's federation ID is 'Only if I am an approver'. The user's app registration is 'One-Time Password'. The user's load lightning pages while scrolling is 'Load Lightning Pages While Scrolling'.

Setup

Search Setup

Users

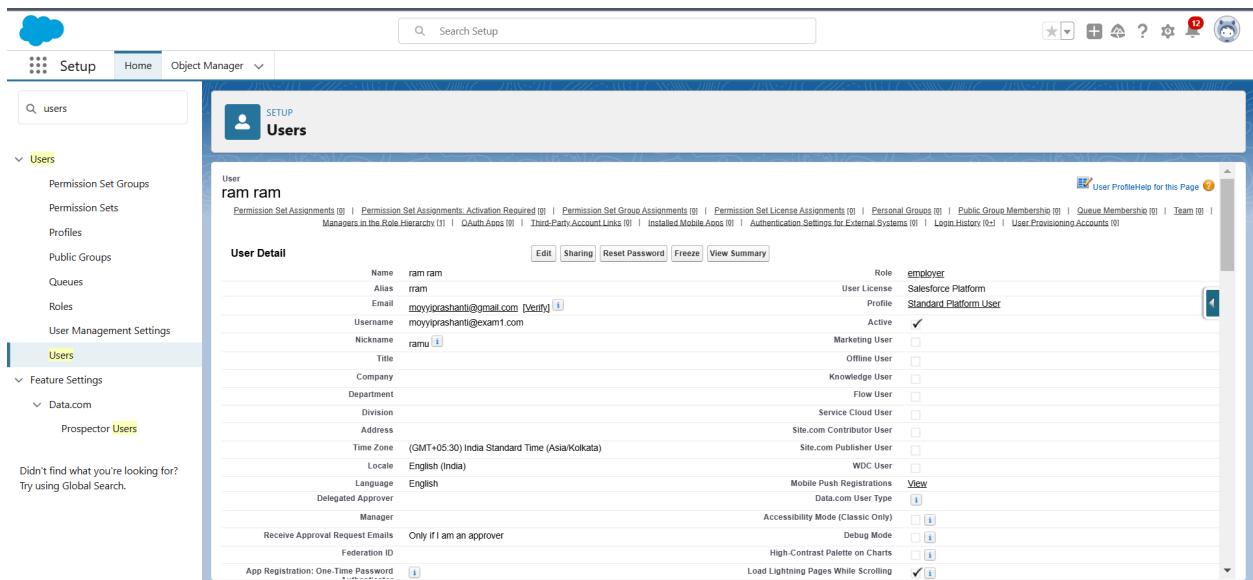
User: vicky y

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

User Detail

Edit | Sharing | Reset Password | Freeze | View Summary

Name	vicky y	Role	owner
Alias	vy	User License	Salesforce
Email	moyiprashanti@gmail.com	Profile	owner
Username	moyiprashanti@exam.com	Active	✓
Nickname	vicky	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>



The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area displays the 'User Detail' for 'ram ram'. The user's email is moyiprashanti@gmail.com, and the nickname is ramu. The user is active and has the role of 'employer'. The user's profile is 'Standard Platform User'. The user's manager is 'Only if I am an approver'. The user's time zone is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The user's locale is 'English (India)'. The user's language is 'English'. The user's delegated approver is 'Only if I am an approver'. The user's receive approval request emails are 'Only if I am an approver'. The user's federation ID is 'Only if I am an approver'. The user's app registration is 'One-Time Password'. The user's load lightning pages while scrolling is 'Load Lightning Pages While Scrolling'.

Setup

Search Setup

Users

User: ram ram

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

User Detail

Edit | Sharing | Reset Password | Freeze | View Summary

Name	ram ram	Role	employer
Alias	ram	User License	Salesforce Platform
Email	moyiprashanti@gmail.com	Profile	Standard Platform User
Username	moyiprashanti@exam1.com	Active	✓
Nickname	ramu	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>

PERMISSION SETS:

Setup

Home

Object Manager

Q Search Setup

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Q sharing settings

Security

Sharing Settings

Didn't find what you're looking for?


Try using Global Search.

SETUP

Sharing Settings

work step template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
consumer	Controlled by Parent	Controlled by Parent	
rice details	Controlled by Parent	Controlled by Parent	
rice mill	Public Read Only	Private	✓
supplier	Public Read Only	Private	✓

REPORT:



Q Search...

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MY RICE

suppliers

rice mills

consumers

rice details

* range of amount per day

Reports

Recent

1 item

Q Search recent reports...


New Report

New Folder

⚙️

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	range of amount per day		estimated rice per day	MOYVI PRASHANTI	25/12/2024, 2:25 pm	✓
Created by Me						
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

sharing report to owner:



Q Search...

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MY RICE


suppliers

rice mills

consumers

rice details

* range of amount per day

 Report: rice mills with consumers

range of amount per day

Enable Field Editing

Q

Add Chart

▼

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Edit

Total Records

Total rice price/kg

Total Amount Paid

10

386

8,143.00

<input type="checkbox"/> Rice taken by shops ↑	Consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
<input type="checkbox"/> 10 (1)	moyvi prashanti	1.basmati	25	Cash	250.00
Subtotal			25		250.00
<input type="checkbox"/> 13 (1)	neralla varshini	2.normal rice	20	Debit card	260.00
Subtotal			20		260.00
<input type="checkbox"/> 14 (2)	revalta sneha	1.basmati	26	Cash	364.00
	jada sukanya	1.basmati	34	Cash	476.00
Subtotal			60		840.00
<input type="checkbox"/> 18 (1)	iyoshna devi	2.normal rice	69	Cash	1,242.00
Subtotal			69		1,242.00
<input type="checkbox"/> 20 (1)	chalia deeksha	2.normal rice	30	Credit card	600.00
Subtotal			30		600.00
<input type="checkbox"/> 23 (3)	battula mounika	1.basmati	56	UPI	1,288.00
	bhuvana muga	2.normal rice	47	Debit card	1,081.00
	raju ram	1.basmati	34	Debit card	782.00
Subtotal			137		3,151.00


Row Counts

Detail Rows

Subtotals

Grand Total

Create a report folder:



MY RICE

suppliersrice millskonsumersrice detailsrange of amount per dayestimated data

Search...

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12

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Reports

All Folders

8 items

Search all folders...

New ReportNew Folder

REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

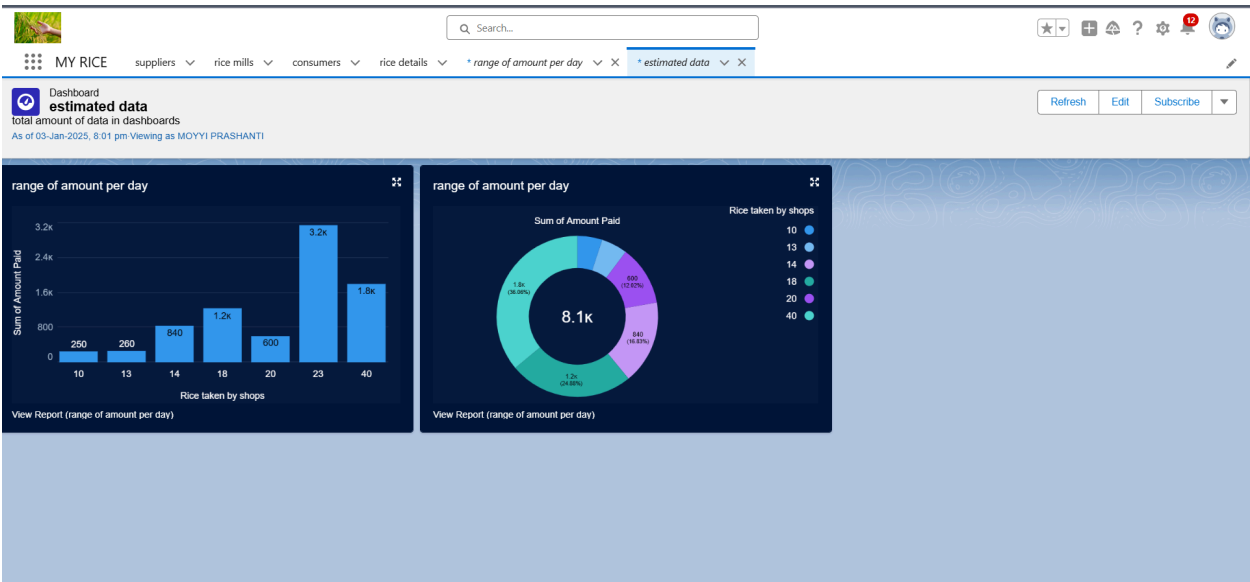
FAVORITES

All Favorites

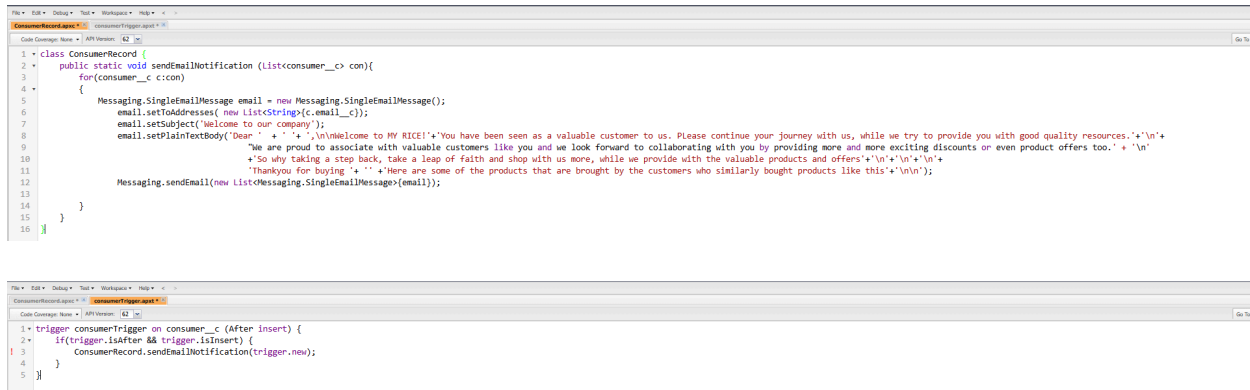
Name	Created By	Created On	Last Modified By	Last Modified Date
Einstein Bot Reports	Automated Process	25/12/2024, 9:17 am	Automated Process	25/12/2024, 9:17 am
Einstein Bot Reports Spring '23	Automated Process	25/12/2024, 9:17 am	Automated Process	25/12/2024, 9:17 am
Einstein Bot Reports Summer '23	Automated Process	25/12/2024, 9:17 am	Automated Process	25/12/2024, 9:17 am
Einstein Bot Reports Summer '22	Automated Process	25/12/2024, 9:17 am	Automated Process	25/12/2024, 9:17 am
Einstein Bot Reports Winter '23	Automated Process	25/12/2024, 9:17 am	Automated Process	25/12/2024, 9:17 am
Enablement Dashboard Reports Spring '24	Automated Process	25/12/2024, 9:17 am	Automated Process	25/12/2024, 9:17 am
Enablement Dashboard Reports Summer '24	Automated Process	25/12/2024, 9:17 am	Automated Process	25/12/2024, 9:17 am
estimated rice per day	MOYVI PRASHANTI	25/12/2024, 2:29 pm	MOYVI PRASHANTI	25/12/2024, 2:29 pm

Workflow Rules and Process Builder: To automate tasks such as order confirmations and follow-ups.

- Reports and Dashboards: For monitoring sales performance, inventory levels, and customer interactions.
- Apex and Visualforce: For implementing custom business logic and UI enhancements.
- Lightning Components: For an enhanced and responsive user interface.



APEX:



4. Detailed Steps to Solution Design

Requirement Gathering:

- Understand the key pain points and requirements of the wholesale rice mill business.
- Document the needs related to customer management, order tracking, and sales processes.

Data Model Design:

- Create custom objects such as Customer, Order, RiceInventory, and Supplier.
- Define relationships between objects (e.g., Customers and Orders, Inventory and Orders).

UI Design:

- Develop user-friendly Lightning pages for key entities.
- Implement search functionality for quick access to records.

Business Logic Implementation:

- Use Apex classes and triggers for custom business rules, such as inventory deduction upon order fulfillment.
- Configure validation rules to ensure data accuracy.

Automation:

- Create workflows for sending automated emails for order confirmations and delivery updates.
- Use Process Builder for follow-up reminders based on order status.

Reports and Dashboards:

- Build dashboards showing sales trends, top customers, and inventory status.
- Configure real-time reports for quick insights.

5. Testing and Validation

Unit Testing:

- Test Apex classes and triggers to ensure accuracy in business logic implementation.

User Interface Testing:

- Validate the usability and responsiveness of Lightning pages across devices.

Integration Testing:

- Verify data flows between different Salesforce components and third-party systems (if any).

User Acceptance Testing (UAT):

- Engage end-users to test the application against real-world scenarios.

6. Key Scenarios Addressed by Salesforce in the Implementation Project

- Efficient tracking of bulk orders and their statuses.
- Maintaining accurate inventory levels with automated updates.
- Generating detailed sales and customer interaction reports.
- Automating repetitive tasks, such as follow-ups and confirmation emails.
- Enabling mobile access for field sales teams.
- Providing a 360-degree view of customer information to improve service quality.

7. Conclusion

Summary of Achievements:

- Successfully implemented a customized CRM solution for wholesale rice mills using Salesforce.
- Streamlined sales and order management processes.
- Enhanced customer relationship management through automation and detailed

insights.

- Improved inventory tracking and operational efficiency.
- Delivered a scalable and user-friendly system aligned with the business's long-term goals.

This project demonstrates the potential of Salesforce as a transformative tool for the wholesale rice mill industry, setting a strong foundation for future growth and innovation.