



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

## Report

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# A CRM Application for Wholesale Rice Mill

## **1. Project Overview**

The Rice Mill CRM Application is a comprehensive solution designed to streamline and optimize the daily operations of a rice mill factory. The primary objective is to track and report daily rice production, sales, and revenue while providing valuable insights to stakeholders. This project leverages Salesforce's capabilities, including custom objects, workflows, and dashboards, to enhance operational efficiency, improve customer satisfaction, and ensure data accuracy. Through this initiative, we aim to provide a centralized platform for managing and analyzing rice mill activities, empowering the organization to make data-driven decisions and achieve long-term growth.

Key aspects of the project include automated reporting, role-based access control, and data visualization, all tailored to the unique requirements of a wholesale rice mill.

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## **2. Objectives**

### **Business Goals:**

- Enhance operational transparency for the rice mill owner.
- Automate the generation of daily reports for production, sales, and revenue.
- Improve customer experience by providing personalized updates and insights.
- Provide role-based data access for improved security and accountability.

### **Specific Outcomes:**

- Enable automated tracking of rice supply, sales, and revenue through custom reports and dashboards.
- Improve decision-making by providing detailed analytics on customer preferences and product performance.
- Streamline operational workflows using master-detail relationships, roll-up summary

fields, and formula fields.

- Establish efficient communication channels with consumers through email notifications.
- 

### 3. Salesforce Key Features and Concepts Utilized

#### 1. Custom Objects:

- **Supplier Object:** Manages supplier details, including total rice supplied.
- **Rice Mill Object:** Tracks daily operations, rice inventory, and pricing.
- **Consumer Object:** Stores customer information, rice purchases, and payment details.
- **Rice Details Object:** Captures granular data on rice types, quantities, and transactions.

#### 1. Roll-Up Summary Fields:

- Summarize data such as total rice supplied to a mill or total rice taken by shops.

#### 1. Cross-Object Formula Fields:

- Calculate total payment amounts (e.g., Rice Taken by Shops × Price per Kilogram).

#### 1. Validation Rules:

- Ensure data integrity by validating fields such as phone numbers, email addresses, and mandatory entries.

#### 1. Permission Sets and Role Hierarchy:

- Implement role-based access control:
  - Owners can access all data.
  - Employers can view worker records and related data.
  - Workers have restricted access to update daily transactions.

#### 1. Reports and Dashboards:

- Generate daily summaries and visualize performance metrics, such as revenue trends and inventory levels, through bar and donut charts.

#### 1. Apex Classes and Triggers:

- Automate email notifications to customers, enhancing communication and engagement.
-

## 4. Step-by-Step Implementation

### Creating Developer Account:

1. Visit [Salesforce Developer Signup](#).
2. Fill in the required details: Name, Email, Role (Developer), Company, and Username (e.g., username@organization.com).
3. Verify the account through the email received and set up your password.

### Objects:

#### Create Supplier Object:

- Navigate to Object Manager > Create > Custom Object.
- Label Name: Supplier; Plural Label: Suppliers.
- Enable "Allow Reports" and "Track Field History."
- Save the object.

The screenshot shows the Salesforce Object Manager interface for creating a custom object named 'supplier'. The page is titled 'Custom Object Definition Edit' and includes a sidebar with navigation options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The main content area is divided into sections: 'Custom Object Information' and 'Enter Record Name Label and Format'. In the 'Custom Object Information' section, the 'Label' is set to 'supplier' (with an example of 'Account'), the 'Plural Label' is 'suppliers' (with an example of 'Accounts'), and the 'Object Name' is 'supplier' (with an example of 'Account'). The 'Description' field is empty. The 'Context Sensitive Help Setting' is set to 'Open the standard Salesforce.com Help & Training window'. In the 'Enter Record Name Label and Format' section, the 'Record Name' is set to 'supplier' (with an example of 'Account Name'). The 'Optional Features' section at the bottom shows that 'Allow Reports' and 'Track Field History' are checked, while 'Allow Activities', 'Allow in Chatter Groups', and 'Enable Licensing' are unchecked.

**Custom Object Definition Edit** [Save] [Save & New] [Cancel]

**Custom Object Information** Required Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label  Example: Account

Plural Label  Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name  Example: Account

Description

Context Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Content Name

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name  Example: Account Name

**Optional Features**

- ☒ Allow Reports
- ☐ Allow Activities
- ☒ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing [i](#)

## Create Rice Mill Object:

- Label Name: Rice Mill; Plural Label: Rice Mills.
- Record Name: Auto Number (e.g., Rice-{000}); Starting Number: 1.
- Enable "Allow Reports" and "Track Field History."
- Save the object.

The screenshot shows the 'Custom Object Definition Edit' page in Salesforce. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The page title is 'Object Manager'. The main section is 'Custom Object Information' with a 'Required Information' warning. It contains fields for 'Label' (rice mill), 'Plural Label' (rice mills), 'Starts with vowel sound' (unchecked), and 'Object Name' (rice\_mill). Below this is the 'Optional Features' section with checkboxes for 'Allow Reports' (checked), 'Allow Activities' (unchecked), 'Track Field History' (checked), 'Allow in Chatter Groups' (unchecked), and 'Enable Licensing' (unchecked).

## Create Consumer Object:

- Label Name: Consumer; Plural Label: Consumers.
- Record Name: Auto Number (e.g., Consumers-{000}); Starting Number: 1.
- Save and enable search functionality.

The screenshot shows the 'Custom Object Definition Edit' page in Salesforce for the 'consumer' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The page title is 'Object Manager'. The main section is 'Custom Object Information' with a 'Required Information' warning. It contains fields for 'Label' (consumer), 'Plural Label' (consumers), 'Starts with vowel sound' (unchecked), and 'Object Name' (consumer). Below this is the 'Optional Features' section with checkboxes for 'Allow Reports' (checked), 'Allow Activities' (unchecked), 'Track Field History' (checked), 'Allow in Chatter Groups' (unchecked), and 'Enable Licensing' (unchecked). The 'Description' field is empty. The 'Context-Sensitive Help Setting' is set to 'Open the standard Salesforce.com Help & Training window'. The 'Content Name' is set to 'None'.

### Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name  Example: Account Name

Data Type  Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Display Format  Example: A-{0000} [What Is This?](#)

### Optional Features

- ☒ Allow Reports
- ☐ Allow Activities
- ☒ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing [i](#)

## Create Rice Details Object:

- Label Name: Rice Details; Plural Label: Rice Details.
- Record Name: Auto Number (e.g., Rice-{000}); Starting Number: 1.
- Save and enable search functionality.

### rice details

Custom Object Definition Edit

SaveSave & NewCancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.  
**Be careful when changing the name or label as it may affect existing integrations and merge templates.**

Label  Example: Account

Plural Label  Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name  Example: Account

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window  
☐ Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name  Example: Account Name

Data Type  Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Display Format  Example: A-{0000} [What Is This?](#)

Optional Features

☒ Allow Reports  
☐ Allow Activities  
☒ Track Field History  
☐ Allow in Chatter Groups  
☐ Enable Licensing [i](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

☒ Allow Sharing  
☒ Allow Bulk API Access  
☒ Allow Streaming API Access

Deployment Status

[What Is This?](#)

# Tabs:

## Creating a Custom Tab:

- Go to Setup > Tabs > New Custom Tab.
- Select the object (e.g., Supplier) and choose a tab style.
- Assign it to the appropriate profiles and save.

Edit Custom Object Tab

consumers

Fill in the fields below to define the custom tab.

**Custom Tab Definition Edit**

**Custom Object Tab Information**



Tab Label

consumers

Object

consumer

Tab Style

 People 

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link

--None--

Enter a short description.

Description


Save

Cancel

**Tab Style Selector** [Create your own style](#)

[Hide styles which are used on other tabs](#)


 Airplane


 Alarm clock

 Apple

 Balls

 Bank

 Bell

 Big top


 Boat


 Books

 Bottle


 Box[1]

 Bridge


 Building

 Building Block


 Caduceus

 Camera

 Can





 Car

 Castle

 CD/DVD

## Creating Remaining Tabs:

- Repeat the above steps for Rice Mill, Consumer, and Rice Details objects.

Custom Object Tabs				
				<a href="#">New</a> <a href="#">What Is This?</a>
Action	Label	Tab Style	Descri	
<a href="#">Edit</a>   <a href="#">Del</a>	consumers	 People		
<a href="#">Edit</a>   <a href="#">Del</a>	rice details	 Form		
<a href="#">Edit</a>   <a href="#">Del</a>	rice mills	 Factory		
<a href="#">Edit</a>   <a href="#">Del</a>	supplier	 Box		

Web Tabs				
				<a href="#">New</a> <a href="#">What Is This?</a>

# The Lightning App:

## Create a Lightning App:

- Navigate to Setup > Search for 'App Manager' > New Lightning App.
- Enter app details (e.g., Name: My Rice CRM) and customize branding.
- Add navigation items: Supplier, Rice Mill, Consumer, and Rice Details.
- Save and assign profiles.

← Lightning App Builder

⚙ App Settings

📄 Pages ▾

MY RICE

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

\* App Name ⓘ

MY RICE

\* Developer Name ⓘ


MY\_RICE

Description ⓘ

Rice Details

App Branding

Image ⓘ



Clear


Primary Color Hex Value ⓘ

#CAC525

Org Theme Options

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

App Launcher Preview



MY RICE  
Rice Details

← Lightning App Builder

⚙ App Settings

📄 Pages ▾

MY RICE

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items. Navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

🔍 Type to filter list...

Accounts

All Sites

Alternative Payment Methods

Analytics

App Launcher

Appointment Categories

Appointment Invitations

Approval Requests

▶

◀

Selected Items

📄 supplier

👤 consumers

📄 rice details

📄 rice mills

▶

◀



**App Settings**

App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
**User Profiles**

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Analytics Cloud Integration User
Analytics Cloud Security User

Selected Profiles

System Administrator
employer
worker

## Fields:

### Creating the Rice Distributed Field in Rice Details Object:

- Go to the setup page >> click on object manager >> From drop down click edit for rice details object
- Click on fields & relationship >> click on New.
- Field Name: Rice Distributed; Data Type: Number; Length: 5.
- Save the field.

Edit rice details Custom Field  
rice distributed

Custom Field Definition Edit

Change Field Type Save Cancel

Field Information

Field Label

rice distributed

Data Type

Number

Field Name

rice\_distributed

Description

rice\_distributed

rice\_distributed\_to\_shops

Help Text

Data Owner

User

Field Usage

--None--

Data Sensitivity Level

--None--

Compliance Categorization

Available

PII
HIPAA
GDPR
PCI

Chosen

reference a field from a Custom metadata type record use: [\\$Custommetadata.type\\_\\_mdc.RecordId](#)

### Number Options

Length

5

Decimal Places

0

Change Field Type

Save

Cancel

## Creating Junction Object:

- Create relationships between Supplier and Rice Details, and Rice Mill and Rice Details using master-detail relationships.
- Go to the setup page >> click on object manager >> From drop down click edit for rice details object

**Data Type**

Select one of the data types below.

- ☐ None Selected
- ☐ Auto Number
- ☐ Formula
- ☐ Roll-Up Summary
- ☐ Lookup Relationship
- ☒ **Master-Detail Relationship**

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.

**New Relationship**

Step 2. Choose the related object

Select the other object to which this object is related

Related To: **Supplier**

Previous Next Cancel

## Creating a Master-Detail Relationship:

- Example: Between Consumer and Rice Mill.
- Field Label: Rice Mill Name; Data Type: Master-Detail.
- Go to the setup page >> click on object manager >> From drop down click edit for consumer object.
- Click on fields & relationship >> click on New , Select "Master-Detail relationship" as data type and click Next.
- Select the related object " rice mill".

Give Field Label as "rice mill name" and click Next.

Next >> Next >> Save.

rice mill name

[Have feedback on lookup filters?](#) [Comments](#)

Custom Field Definition Edit

SaveCancel

Field Information

Field Label

rice mill name

Data Type

Master-Detail

Field Name

rice\_mill\_name

Description

Help Text

Data Owner

User

Field Usage

--None--

Data Sensitivity Level

None

Master-Detail Options

Related To

rice\_mill

Child Relationship Name

consumers

Related List Label

consumers

Sharing Setting

Select the minimum access level required on the Master record to create, edit, or delete related Detail records:

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

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

Allow reparenting

☐ Child records can be reparented to other parent records after they are created

Lookup Filter

## Creating the Roll-Up Summary:

- Summarize fields like total rice distributed in Supplier and Consumer objects.
- Use SUM as the aggregation type.

Edit supplier Custom Field

sum of rice distributed

Custom Field Definition Edit

SaveCancel

Field Information

Field Label

sum of rice distributed

Field Name

sum\_of\_rice\_distributed

Description

Help Text

Data Owner

User

Roll-Up Summary Options	
Data Type	Roll-Up Summary
Calculation Options	<input checked="" type="radio"/> Automatic calculation (Recommended) <input type="radio"/> Force a mass recalculation of this field
Select Object to Summarize	
Master Object	supplier
Summarized Object	rice details
Select Roll-Up Type	
<input type="radio"/> COUNT <input checked="" type="radio"/> SUM <input type="radio"/> MIN <input type="radio"/> MAX	Field to Aggregate: rice distributed ▼
Filter Criteria	
<input checked="" type="radio"/> All records should be included in the calculation <input type="radio"/> Only records meeting certain criteria should be included in the calculation	
<div>Save</div> <div>Cancel</div>	

### Creating Fields in Objects:

- Add fields like Price per Kilogram, Rice Type (Picklist), and Mode of Payment (Picklist) in respective objects. Go to the setup page >> click on object manager >> From drop down click edit for rice details object.
- Click on fields & relationship >> click on New.
- Select Data type as “master detail” and click Next.
- Given the Field Label as “supplier name” and length as “5”

supplier Name

[Have feedback on lookup filters?](#) [Comment on](#)

Custom Field Definition Edit	
<div>Save</div> <div>Cancel</div>	
Field Information	
Field Label	supplier Name
Field Name	supplier
Description	
Help Text	
Data Owner	User
Field Usage	--None--
Data Sensitivity Level	--None--
Compliance Categorization	
Master-Detail Options	
Related To	supplier
Child Relationship Name	rice_details
Related List Label	rice details
Sharing Setting	Select the minimum access level required on the Master record to create, edit, or delete related Detail records: <input type="radio"/> Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records. <input checked="" type="radio"/> Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
Allow reparenting	<input type="checkbox"/> Child records can be reparented to other parent records after they are created

## Creating Cross-Object Formula Field in Consumer Object:

- Field Name: Amount Paid; Formula: `Rice_Taken_by_Shops__c * Rice_Price_per_Kg__c`.
- Save the formula.

**Field Information**

Field Label:

Field Name:

Description:

Help Text:

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.  
Example: Fahrenheit = 1.8 \* Celsius\_\_c + 32 [More Examples...](#)

**Simple Formula** **Advanced Formula**

Insert Field

Amount Paid (Number) =  
`rice_taken_by_shops_in_kgs__c * rice_mill_name_r.rice_price_kg__c`

**Functions**  
-- All Function Categories --  
ABS  
ACOS  
ADDMONTHS  
AND  
ASCII  
ASIN

## Creating the Validation Rule:

- Example: For phone number/email validation in Consumer object.
- Formula: `OR(ISBLANK(Phone_Number__c), ISBLANK(Email__c))`.
- Error Message: "Phone number or email cannot be blank."

**Validation Rule Edit**

Rule Name:

Active: ☒

Description:

**Error Condition Formula**

Example:  [More Examples...](#)  
Display an error if Discount is more than 30%  
If this formula expression is **true**, display the text defined in the Error Message area

`OR( ISBLANK( Phone_number__c ) , ISBLANK( email__c ) )`

**Functions**  
-- All Function Categories --  
ABS  
ACOS  
ADDMONTHS  
AND  
ASCII  
ASIN

ABS(number)  
Returns the absolute value of a number, a number without its sign  
[Help on this function](#)

**Error Message**

Example:

This message will appear when Error Condition formula is **true**

Error Message:

This error message can either appear at the top of the page or below a specific field on the page

Error Location: ☒ Top of Page ☐ Field

# Page Layouts:

## Creating the Page Layout:

- Navigate to Object Manager > Select Object(consumer) > Page Layouts > New.
- Customize sections:
  - Personal Details: Name, Phone, Email.
  - Rice Details: Rice Type, Quantity.
  - Payment Details: Mode of Payment, Amount Paid.
- Save and assign the layout to profiles.

## Create New Page Layout

As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections.

Existing Page Layout:

Page Layout Name:

**Section Properties**

Section Name:

Display Section Header On:  
☒ Detail Page  
☒ Edit Page

Layout:  
☐ 1-Column ☒ 2-Column

Tab-key Order:  
☒ Left-Right ☐ Top-Down

**Layout Properties**

Quick Find:

Field Name	Consumer Name	Last Modified By	rice mill name
Section	Created By	Last name	Rice taken by shops
Blank Space	Amount Paid	email	rice taken by sho...
consumer Name	First name	Phone number	Rice type

**consumer Detail**

Standard Buttons:

Custom Buttons:

**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 in kgs: 85,037  
Rice type: Sample Text  
Rice taken by shops: 40,403

# Profiles:

## Owner Profile:

- Clone Standard User profile and rename it as Owner.
- Grant full access to all objects and tabs.

owner

Set the permissions and page layouts for this profile.

Profile Edit

Save

Save & New

Cancel

Name

owner

User License

Salesforce

Description

Custom Profile

☒

SETUP

Profiles

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asset Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brokers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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"/>
Employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
energy audits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
nick names	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
positions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ProjectTasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Properties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
purchasers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
reviews	<input 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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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"/>
SolarBots	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SolarBot Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
studs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
super marts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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"/>
teachers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
tickets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
vendors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

## Employer Profile:

- Clone Standard Platform User profile and rename it as Employer.
- Restrict access to certain objects like Workers.

SETUP Profiles		Basic Access				Data Administration	
		Read	Create	Edit	Delete	View All	Modify All
Assets		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asset Services		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
books		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
books		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brokers		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
consumers		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employees		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
energy audits		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
item details		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
nick names		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
positions		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Projects		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ProjectTasks		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Properties		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SETUP Profiles		Basic Access				Data Administration	
		Read	Create	Edit	Delete	View All	Modify All
purchasers		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
reviews		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
rice details		<input checked="" type="checkbox"/>	<input 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"/>
SolarBots		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SolarBot Status		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
studs		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
students		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
super marts		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
suppliers		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
teachers		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
tickets		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
vendors		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Worker Profile:

- Clone Standard Platform User profile and rename it as Worker.
- Allow limited access to update transactions only.

SETUP Profiles		Basic Access				Data Administration	
		Read	Create	Edit	Delete	View All	Modify All
Assets		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asset Services		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
books		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
books		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brokers		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
consumers		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employees		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
energy audits		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
item details		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
nick names		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
positions		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Projects		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SETUP Profiles		Basic Access				Data Administration	
		Read	Create	Edit	Delete	View All	Modify All
purchasers		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
reviews		<input 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"/>
rice mills		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SolarBots		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SolarBot Status		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
studs		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
students		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
super marts		<input type="checkbox"/>	<input 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"/>
teachers		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
tickets		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Role & Role Hierarchy:

### Creating Owner Role:

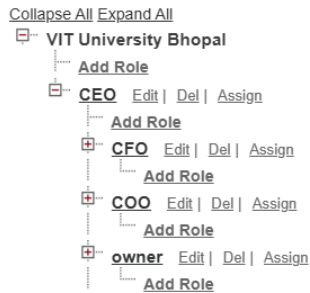
- Go to Setup > Roles > Set Up Roles.
- Click on Add Role under CEO and Give Label as "owner" and Role name gets auto populated.
- Role Label: Owner; Save the role.



## Creating the Role Hierarchy

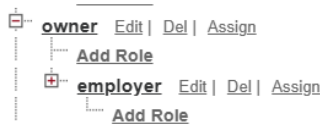
You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

## Your Organization's Role Hierarchy



## Creating Employer Roles:

- Add a new role under Owner:
- Role Label: Employer; Save the role.



## Creating Worker Roles:

- Add a role under Employer:
- Role Label: Worker; Save the role.



## Users:

### Create User:

- Go to Setup > Users > New User.
- Enter details (e.g., Name: Arshad Y; Role: Owner).

<div><div>New User</div><div>Reset Password(s)</div><div>Add Multiple Users</div></div>							
<input type="checkbox"/>	Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	<a href="#">  Edit</a>	Bidi Bazz Arshad	Diddy	arshad@techcure.com	owner	✓	owner
<input type="checkbox"/>	<a href="#">  Edit</a>	Chatter Expert	Chatter	chatty.00ddm00000g9tetua3.r1x3gwahrigs@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>	<a href="#">  Edit</a>	Khan Afraz	Afraz	afraz@techcure.com	employer	✓	Standard Platform User
<input type="checkbox"/>	<a href="#">  Edit</a>	Meer.Syed.Maaz	SMmeer	@vitbhopal.ac.in		✓	System Administrator
<input type="checkbox"/>	<a href="#">  Edit</a>	Sheik Tofik	Tofik	tofik@techcure.com	worker	✓	Standard Platform User
<input type="checkbox"/>	<a href="#">  Edit</a>	User Integration	integ	integration@00ddm00000g9tetua3.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>	<a href="#">  Edit</a>	User Security	sec	insightssecurity@00ddm00000g9tetua3.com		✓	Analytics Cloud Security User
<div><div>New User</div><div>Reset Password(s)</div><div>Add Multiple Users</div></div>							

## Create Another User:

- Repeat for Afraz (Role: Employer).

User Edit  
Afraz Khan

Help for this Page

User Edit Save Save & New Cancel

General Information ⓘ Required Information

First Name	Afraz	Role	employer
Last Name	Khan	User License	Salesforce Platform
Alias	Afraz	Profile	Standard Platform User ⓘ
Email	afraz@techcure.com	Active	<input checked="" type="checkbox"/>
Username	afraz@techcure.com	Marketing User	<input type="checkbox"/>
Nickname	Afraz ⓘ	Offline User	<input type="checkbox"/>

## Create Another User:

- Repeat for Tofik (Role: Worker).

User Edit

Save Save & New Cancel

General Information ⓘ Required Information

First Name	Tofik	Role	worker
Last Name	Sheik	User License	Salesforce Platform
Alias	Tofik	Profile	Standard Platform User ⓘ
Email	tofik@techcure.com	Active	<input checked="" type="checkbox"/>
Username	tofik@techcure.com	Marketing User	<input type="checkbox"/>
Nickname	TofikCure ⓘ	Offline User	<input type="checkbox"/>

## Permission Sets:

### Creating OWD Setting:

- Go to Setup > type 'Sharing Settings' in Quik search box.
- Set default internal access to "Public Read Only" for Rice Mill and Supplier objects.

SETUP Sharing Settings

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an default or a parallel sharing recalculation.

Manage sharing settings for: All Objects

Default Sharing Settings

Organization-Wide Defaults Edit Organization-Wide Defaults H

Work Plan Template	Private	Private	<input checked="" type="checkbox"/>
Work Step Template	Private	Private	<input checked="" type="checkbox"/>
Work Type	Private	Private	<input checked="" type="checkbox"/>
Work Type Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
rice mill	Public Read Only	Private	<input checked="" type="checkbox"/>
supplier	Public Read Only	Private	<input checked="" type="checkbox"/>

Other Settings

Public Read Only ⓘ

Manual User Record Sharing ⓘ Manager Groups ⓘ

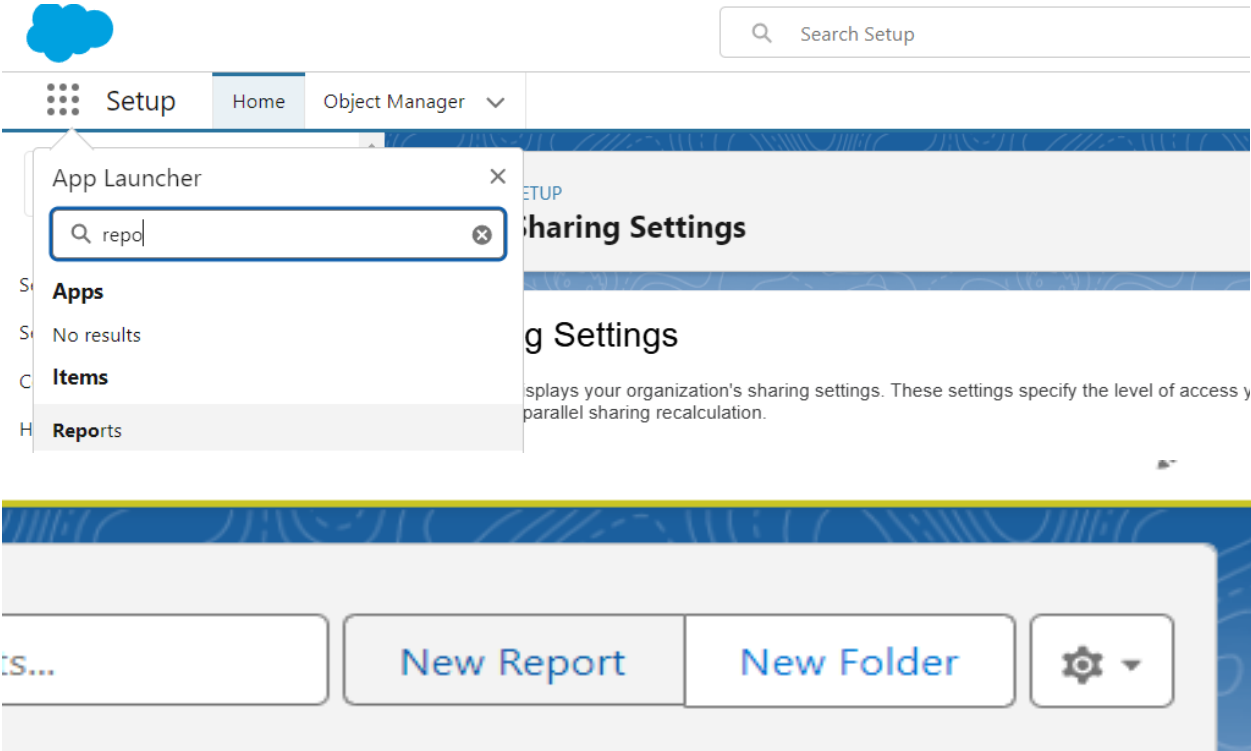
Secure guest user record access ⓘ Require permission to view record names in lookup fields ⓘ

Save Cancel

# Reports:

## Create Report:

- Go to Reports > New Report > Select "Rice Mills with Consumers".
- Add fields: Consumer Name, Rice Type, Mode of Payment, Amount Paid.
- Group rows by Rice Taken by Shops and save as "Range of Amount Per Day".



Select a Report Type

Showing results for rice mills with

Report Type Name	Category
rice mills with consumers	Standard
rice mills with rice details and supplier	Standard

Details

rice mills with consumers

Standard Report Type

Start Report

Details

Fields (32)

REPORT

New rice mills with consumers Report

rice mills with consumers

Outline

Filters 1

Groups

GROUP ROWS

Add group...

Columns

Add column...

rice mill: rice mill Name

consumer: consumer Name

Previewing a limited number of records. Run the report to see everything.

	rice mill: rice mill Name	consumer: consumer Name
1	rice-001	consumers-001
2	rice-002	consumers-005
3	rice-002	consumers-002
4	rice-001	consumers-003
5	rice-001	consumers-004
6	rice-001	consumers-006
7	rice-002	consumers-007



Report: rice mills with consumers

### Copy of range of amount per day

Total Records  
7

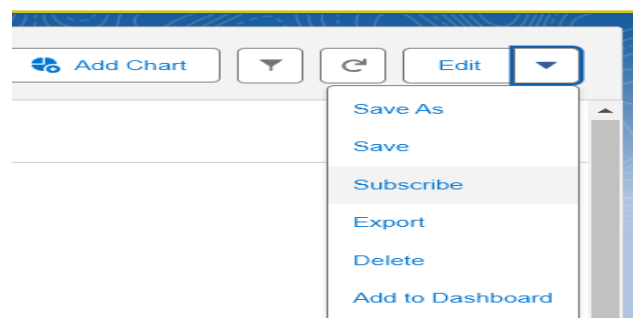
Total rice price/kg  
68

Total Amount Paid  
2,249.00

<input type="checkbox"/> Rice taken by shops ↑ ▾	<input type="checkbox"/> Consumer Name ▾	<input type="checkbox"/> Rice type ▾	<input type="checkbox"/> rice price/kg ▾	<input type="checkbox"/> Mode of payment ▾	<input type="checkbox"/> Amount Paid ▾
<input type="checkbox"/> 10 (1)	Maaz Maafiya	1.basmati,	45	Net banking,	315.00
<b>Subtotal</b>			45		315.00
<input type="checkbox"/> 11 (1)	Afraz Salauddin	2.normal rice	45	UPI,	225.00
<b>Subtotal</b>			45		225.00
<input type="checkbox"/> 20 (1)	Sufiyan ali	1.basmati,	45	UPI,	495.00
<b>Subtotal</b>			45		495.00
<input type="checkbox"/> 35 (1)	Hunain Meer	1.basmati,	23	Debit card,	207.00
<b>Subtotal</b>			23		207.00
<input type="checkbox"/> 39 (1)	Arshad Qawalli	1.basmati,	23	Cash	46.00
<b>Subtotal</b>			23		46.00
<input type="checkbox"/> 45 (1)	Tofik Sultan	2.normal rice	45	Net banking,	225.00
<b>Subtotal</b>			45		225.00
<input type="checkbox"/> 52 (1)	Talha Phelwan	1.basmati,	23	Cash	736.00
<b>Subtotal</b>			23		736.00
Row Counts <input checked="" type="checkbox"/> Detail Rows <input checked="" type="checkbox"/> Subtotals <input checked="" type="checkbox"/> Grand Total <input checked="" type="checkbox"/>					

### Sharing Report to Owner:

1. Go to the created report, click on the dropdown menu next to the report name.
2. Select **Subscribe**.
3. In the settings window, choose:
  - **Send report as another user** (Owner's email).
  - Set the frequency as **Daily**.
4. Click **Save**. The owner will receive a daily email with updated rice mill data.



Edit Subscription

Settings

Frequency

DailyWeeklyMonthly

Time

8:00 am

Attachment

Attach File

Recipients

Send email toMe

Edit Recipients

Run Report As

☐ Me☒ Another Person

Cancel

Save

### Create Report Folder:

1. Go to **Reports** from the App Launcher.
2. Click on **New Folder**.
3. Name the folder: "Estimated Rice Per Day."
4. Move the created report **Range of Amount Per Day** into this folder:
  - o Select the report dropdown.
  - o Choose **Move** > Select folder: Estimated Rice Per Day > Save.

Search recent reports...

New Report

New Folder

▼

▼

Created On

▼

Subscribed

6/12/2024, 3:26 pm

▼

Create folder

\* Folder Label

estimated rice per day

\* Folder Unique Name

estimatedriceperday

Cancel

Save

Reports

Recent

2 items

Q Search recent reports...

New Report

New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed	
Recent	Copy of range of amount per day		estimated rice per day	Syed Maaz Meer	6/12/2024, 3:26 pm		
Created by Me	range of amount per day		Private Reports	Syed Maaz Meer	6/12/2024, 3:23 pm	✓	
Private Reports							
Public Reports							
All Reports							
FOLDERS							
All Folders							
Created by Me							
Shared with Me							
FAVORITES							

Run

Edit

Subscribe

Export

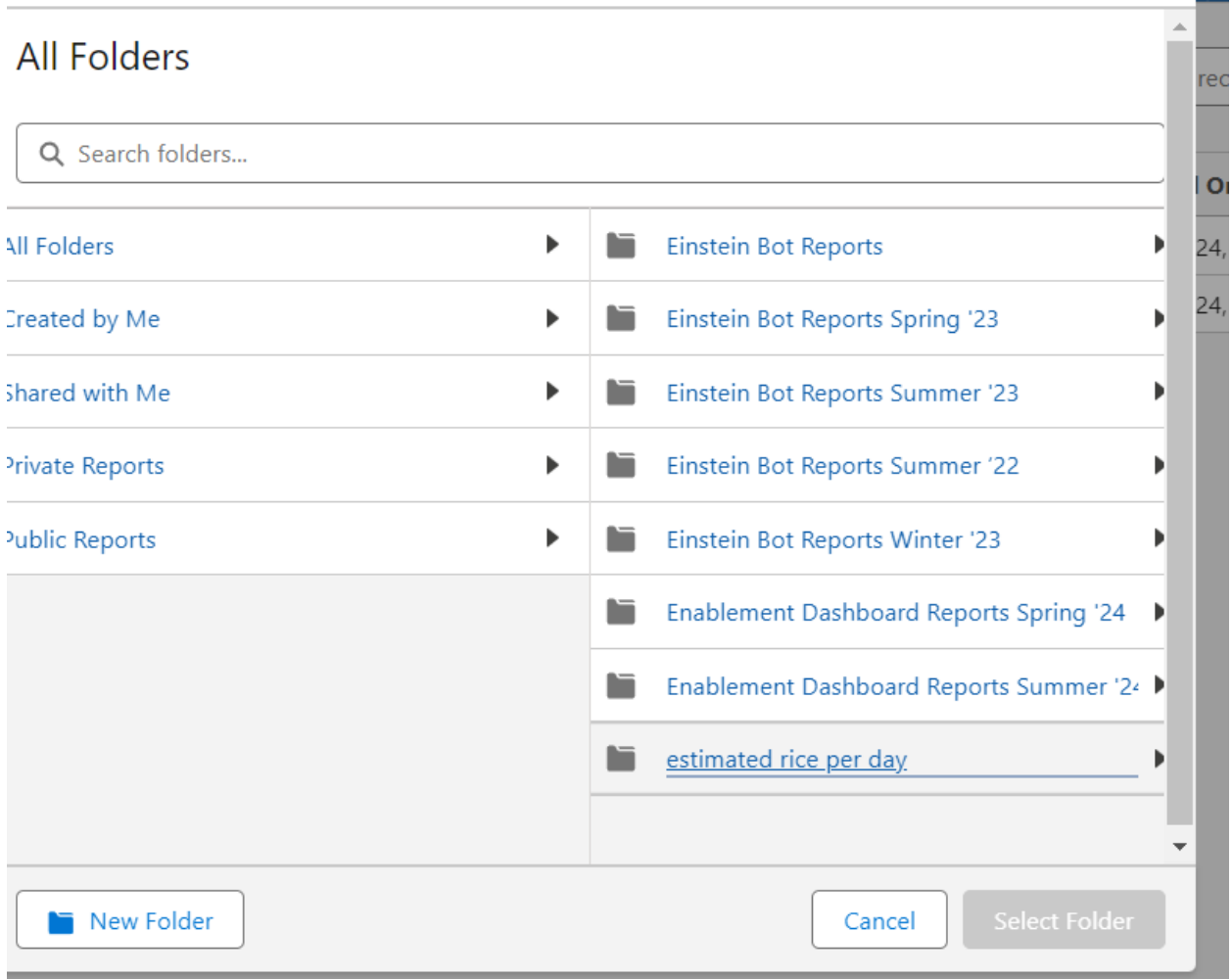
Delete

Add to Dashboard

Favorite

Move

## Move range of amount per day



## Dashboards

### 1. Create Dashboard Folder:

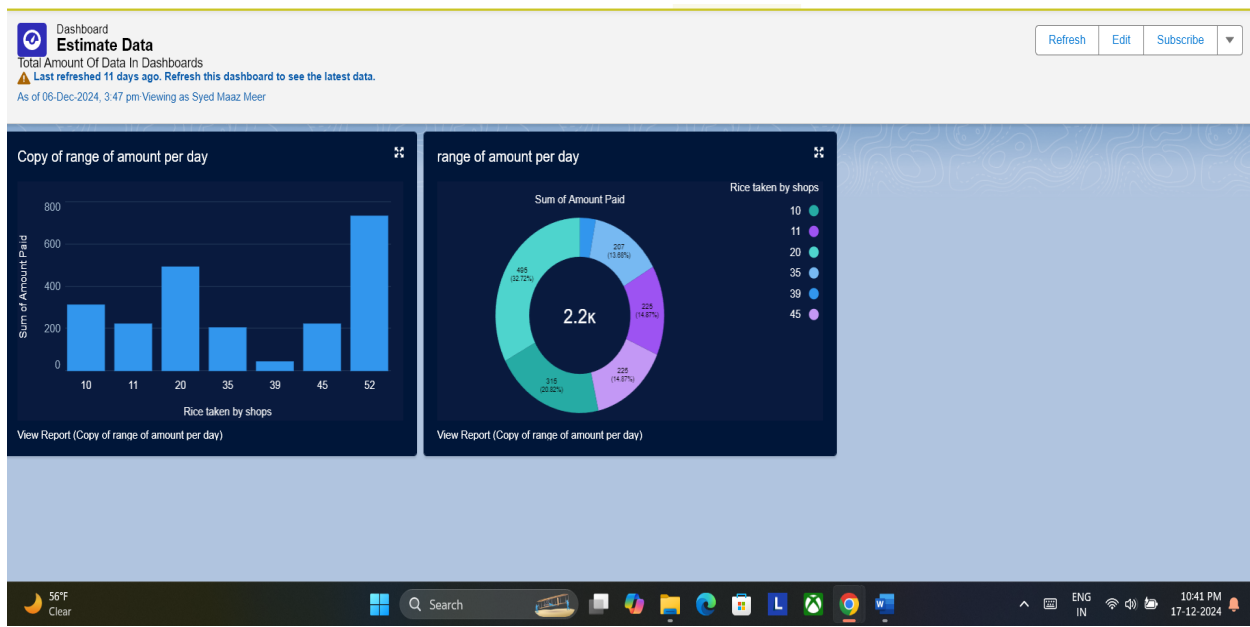
1. Navigate to **Dashboards** in the App Launcher.
2. Click **New Folder**, and name it **Amount Data Dashboard**.
3. Save the folder.

### 2. Create Dashboard:

1. Go to the **Dashboards** tab > **New Dashboard**.
2. Enter the name: "Rice Mill Summary" and save it in **Amount Data Dashboard**.
3. Add components:
  - Select **Reports** (e.g., "Range of Amount Per Day").

- Component 1: **Vertical Bar Chart:**
- X-axis: Rice Taken by Shops.
- Y-axis: Sum of Amount.
- Component 2: **Donut Chart:**
- Sort by: Sum of Amount Paid.

#### 4. Preview and click **Save & Done**.



## APEX

### 1. Creating an Apex Class (ConsumerRecord):

1. Open **Developer Console** (Gear icon > Developer Console).
2. Go to File > New > **Apex Class**.
3. Add the following code:

```
1 class ConsumerRecord {
2     public static void sendEmailNotification (List<consumer__c>
con){
3         for(consumer__c c:con)
4             {Messaging.SingleEmailMessage email = new
Messaging.SingleEmailMessage();
5 email.setToAddresses( new List<String>{c.email__c});
6 email.setSubject('Welcome to our company');
7 email.setPlainTextBody('Dear ' + ' ' + ',\n\nWelcome to MY
RICE!'+'You have been seen as a valuable customer to us. PLease
continue your journey with us, while we try to provide you with
good quality resources.'+'\n'+
```



```

8         "We are proud to
associate with valuable customers like you and we look forward to
collaborating with you by providing more and more exciting
discounts or even product offers too.'" + '\n'
9         +'So why taking a step
back, take a leap of faith and shop with us more, while we provide
with the valuable products and offers'+'\n'+'\n'+'\n'+
10         'Thankyou for buying '+
'' +'Here are some of the products that are brought by the
customers who similarly bought products like this'+'\n\n');
11         Messaging.sendEmail(new
List<Messaging.SingleEmailMessage>{email});
12
13     }
14 }
15 }
16
17

```

4. Save the class.

## 2. Creating an Apex Trigger:

1. Go to **Developer Console** > File > New > Trigger.
2. Name the trigger: **ConsumerTrigger**. Set the object to **Consumer\_\_c**.
3. Add the following code:

```

1 trigger ConsumerTrigger on Consumer__c (after insert)
2     {
3         if (Trigger.isAfter && Trigger.isInsert) {
4             ConsumerRecord.sendEmailNotification(Trigger.new);
5         }
6     }
7

```

4. Save the trigger. This ensures an email is sent whenever a new Consumer record is created.
-

## 5. Testing and Validation

### Unit Testing:

- Apex classes and triggers were validated to ensure error-free email notifications.
- Roll-up summary and formula fields were tested for accurate calculations.

### User Interface Testing:

- Verified functionality of page layouts, ensuring seamless navigation and usability.
- Ensured accurate rendering of reports and dashboards.

### End-to-End Testing:

- Simulated daily workflows, including data entry, report generation, and dashboard updates, to validate system reliability.
  - Tested role-based access controls to ensure proper data visibility and security.
- 

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

### 1. Daily Reporting:

- Automating the generation of daily production, sales, and revenue reports for the owner.

### 1. Role-Based Data Access:

- Providing tailored access to data based on user roles (e.g., Owner, Employer, Worker).

### 1. Enhanced Customer Engagement:

- Sending email notifications to customers with details of their purchases and payments.

### 1. Data Integrity:

- Ensuring data consistency and reliability through validation rules and error handling.

### 1. Business Insights:

- Delivering actionable insights through reports and dashboards, enabling data-driven decisions.

## 7. Conclusion

### Summary of Achievements:

The Rice Mill CRM Application successfully automated and optimized the rice mill's operational processes. Key achievements include:

- **Operational Efficiency:**

- Streamlined workflows and improved resource allocation through automated data management.

### Data Visualization:

- Developed dynamic reports and dashboards to provide real-time insights into production, sales, and revenue.

- **Enhanced Security:**

- Implemented robust role-based access control, ensuring data confidentiality and integrity.

- **Improved Customer Communication:**

- Automated email notifications and integrated customer engagement tools.

- **Scalability:**

- Built a scalable and modular solution using Salesforce's flexible framework, ensuring adaptability for future enhancements.

The Rice Mill CRM Application exemplifies the transformative power of Salesforce to meet specific industry needs, driving operational excellence and enabling long-term success for the rice mill.