

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:

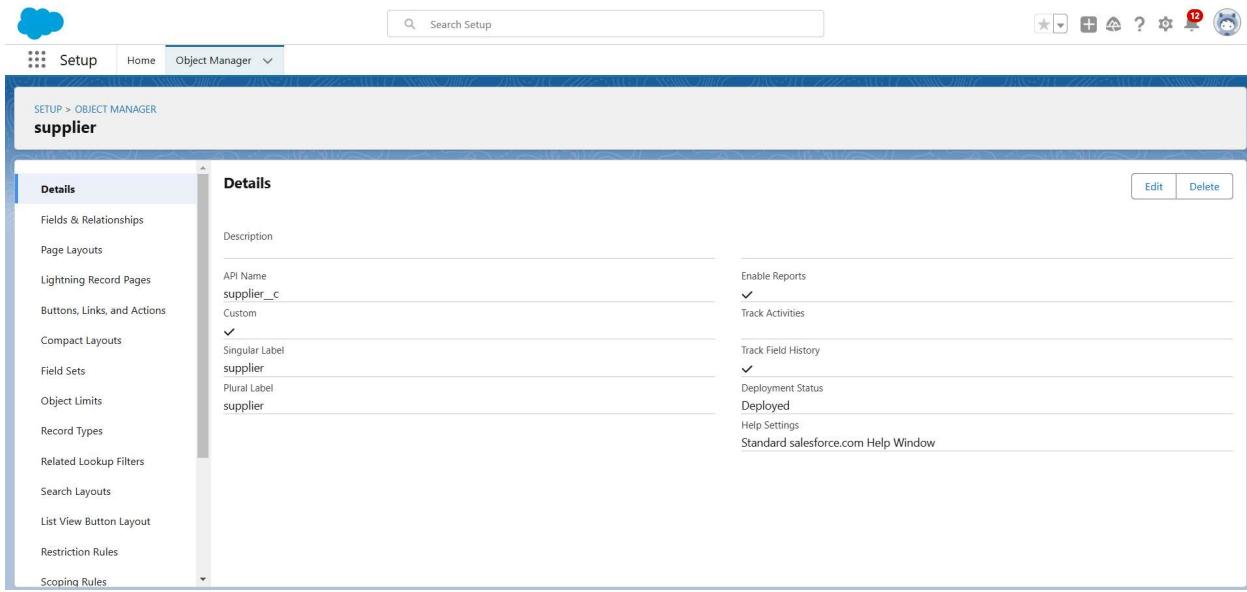
- Develop a centralized database for managing customer information, orders, and inventory.
- Create custom Salesforce workflows to automate routine tasks.
- Implement dashboards and reports for real-time analytics.
- Enable mobile access for on-the-go CRM functionalities.

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.

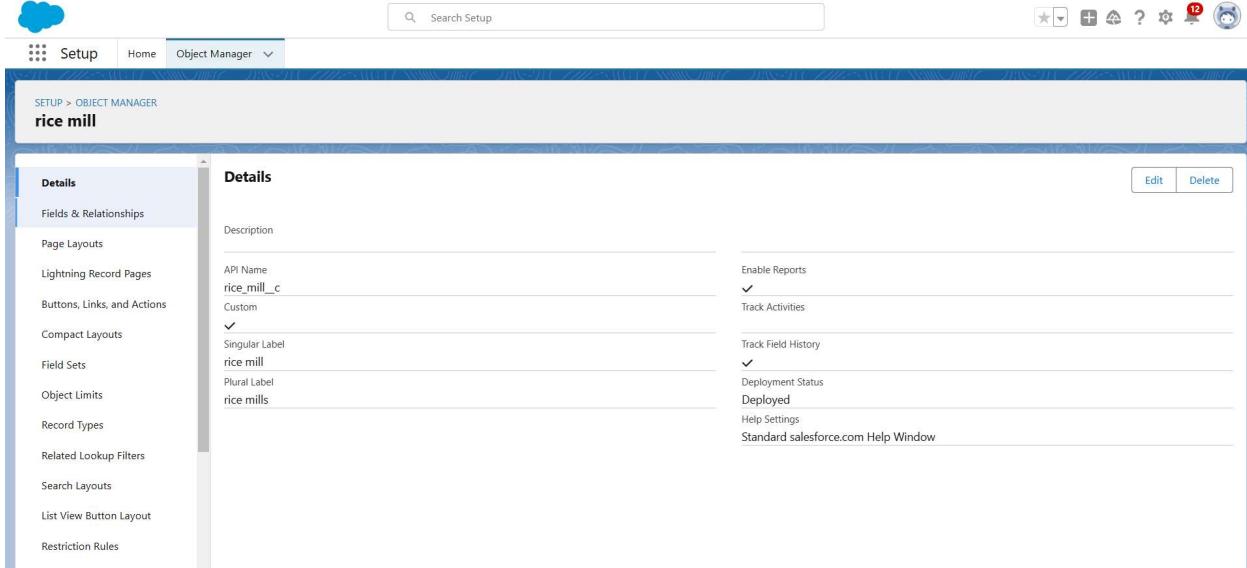
OBJECTS:



The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right says 'Search Setup'. The main area displays the 'supplier' object details. On the left, a sidebar lists various configuration tabs: 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 'Details' tab is selected. The main content area shows the following details for the 'supplier' object:

Field	Value
Description	
API Name	supplier_c
Custom	✓
Singular Label	supplier
Plural Label	supplier
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Edit | **Delete**



The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right says 'Search Setup'. The main area displays the 'rice mill' object details. The sidebar on the left is identical to the first screenshot. The 'Details' tab is selected. The main content area shows the following details for the 'rice mill' object:

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

Edit | **Delete**

SETUP > OBJECT MANAGER
consumer

Details

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

<https://projectcom-b5-dev-ed.lightning.force.com/one/one.app#/setup/ObjectMan...>

SETUP > OBJECT MANAGER
rice details

Details

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:

Setup Home 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

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 add Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

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

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

The screenshot shows the Lightning Experience App Manager page. The left sidebar is collapsed, and the main area displays a table of 24 installed apps. The columns include App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. Key entries include Data Manager, Digital Experiences, and various Salesforce and third-party apps.

App Name	Developer Name	Description	Last Modified Date	App Type	Vis...
9 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	25/12/2024, 5:39 pm	Lightning	✓
10 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	25/12/2024, 5:39 pm	Lightning	✓
11 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	25/12/2024, 5:39 pm	Lightning	✓
12 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	25/12/2024, 5:39 pm	Classic	✓
13 MY RICE	MY_RICE		25/12/2024, 8:34 pm	Lightning	✓
14 Platform	Platform	The fundamental Lightning Platform	25/12/2024, 5:39 pm	Classic	✓
15 Queue Management	QueueManagement	Create and manage queues for your business.	25/12/2024, 5:39 pm	Lightning	✓
16 Sales	Sales	The world's most popular sales force automation (SFA) solution	25/12/2024, 5:39 pm	Classic	✓
17 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	25/12/2024, 5:39 pm	Lightning	✓
18 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	25/12/2024, 5:39 pm	Lightning	✓
19 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	25/12/2024, 5:39 pm	Classic	✓
20 Salesforce Scheduler S...	LightningScheduler	Set up personalized appointment scheduling.	25/12/2024, 5:42 pm	Lightning	✓
21 Service	Service	Manage customer service with accounts, contacts, cases, and more	25/12/2024, 5:39 pm	Classic	✓
22 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across custo...	25/12/2024, 5:39 pm	Lightning	✓

FIELDS:

The screenshot shows the Object Manager for the 'rice details' object. The left sidebar lists various setup categories. The main page displays the configuration for a custom field named 'rice distributed'. The field is defined as a Number type with a length of 5 and decimal places of 0. It has validation rules and is associated with the 'rice details' object.

Field Information	Object Name
Field Label: rice distributed	rice details
Field Name: rice_distributed	Data Type: Number
API Name: rice_distributed_c	
Description:	
Help Text:	
Data Owner:	
Field Usage:	
Data Security Category:	
Compliance Categorization:	
Created By: PATIVADA USHARANI 25/12/2024, 9:16 pm	Modified By: PATIVADA USHARANI 25/12/2024, 9:18 pm

The screenshot shows the Salesforce Setup interface for the 'rice details' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'rice details'. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The central panel displays the 'Custom Field Definition Detail' for the 'supplier Name' field. Key details shown include:

- Field Information:** Field Label: supplier Name, Field Name: supplier_Name, API Name: supplier_Name__c.
- Relationships:** Related To: supplier, Related List Label: rice details, Child Relationship Name: rice_details.
- Validation Rules:** None defined.
- Lookup Filter:** No lookup filters defined.

The screenshot shows the Salesforce Setup interface for the 'consumer' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'consumer'. The left sidebar is identical to the first screenshot. The central panel displays the 'Custom Field Definition Detail' for the 'rice mill name' field. Key details shown include:

- Field Information:** Field Label: rice mill name, Field Name: rice_mill_name, API Name: rice_mill_name__c.
- Relationships:** Related To: rice_mill, Related List Label: consumers, Child Relationship Name: consumes.
- Validation Rules:** None defined.
- Lookup Filter:** No lookup filters defined.

Setup > Object Manager

supplier

supplier Custom Field
rice distributed to shops

Back to supplier

Help for this Page ⓘ

Fields & Relationships

- Details
- 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
- Object Access
- Triggers
- Flow Triggers
- Validation Rules

Custom Field Definition Detail

Field Information

Field Label	rice distributed to shops
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: PATIVADA USHARANI, 25/12/2024, 9:23 pm Modified By: PATIVADA USHARANI, 25/12/2024, 9:23 pm

Object Name: supplier

Roll-Up Summary Options

Data Type	Roll-Up Summary
Summarized Object	rice details
Field to Aggregate	rice_details:rice_distributed
Filter Criteria	

Summary Type: SUM

Setup > Object Manager

rice details

rice details Custom Field
supplier Name

Back to rice details

Help for this Page ⓘ

Fields & Relationships

- Details
- 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
- Object Access
- Triggers
- Flow Triggers
- Validation Rules

Custom Field Definition Detail

Field Information

Field Label	supplier Name
Field Name	supplier_Name
API Name	supplier_Name_c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	

Created By: PATIVADA USHARANI, 25/12/2024, 8:41 pm Modified By: PATIVADA USHARANI, 25/12/2024, 8:41 pm

Object Name: rice_details Data Type: Master-Detail

Master-Detail Options

Related To:	supplier
Related List Label:	rice details
Sharing Setting:	ReadWrite. Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
Representable Master Detail:	

Child Relationship Name: rice_details

Lookup Filter

No lookup filters defined.

Validation Rules

No validation rules defined.

Validation Rules Help ⓘ

Always show me more records per related list

^ Back To Top

Setup Home Object Manager

SETUP > OBJECT MANAGER
rice mill

rice price/kg

Back to rice mill

Custom Field Definition Detail

Help for this Page

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

Object Access

Triggers

Flow Triggers

Validation Rules

rice price/kg

Field Label: rice price/kg
Field Name: rice_price_kg
API Name: rice_price_kg_c
Description:
Help Text:
Data Owner:
Field Usage:
Data Sensitivity Level:
Compliance Categorization:
Created By: PATIVADA USHARANI 25/12/2024, 9:52 pm
Modified By: PATIVADA USHARANI 25/12/2024, 9:52 pm

Object Name: rice mill
Data Type: Number
Modified By: PATIVADA USHARANI 25/12/2024, 9:52 pm

General Options

Required:
Unique:
External ID:
AI Prediction:
Default Value:

Number Options

Length: 5
Decimal Places: 0

Validation Rules

No validation rules defined.

Validation Rules Help

^ Back To Top Always show me 1 more records per related list

Setup Home Object Manager

SETUP > OBJECT MANAGER
consumer

Fields & Relationships

13 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid__c	Formula (Number)		▼
consumer Name	Name	Auto Number		▼
Consumer Name	Consumer_Name__c	Formula (Text)		▼
Created By	CreatedById	Lookup(User)		▼
email	email__c	Email		▼
First name	First_name__c	Text(50)		▼
Last Modified By	LastModifiedById	Lookup(User)		▼
Last name	Last_name__c	Text(50)		▼
Mode of payment	Mode_of_payment__c	Picklist		▼
phone number	Phone_number__c	Phone		▼
rice mill name	rice_mill_name__c	Master-Detail(rice mill)		▼
Rice taken by shops	Rice_taken_by_shops__c	Number(5, 0)		▼
rice taken by shops in kgs	rice_taken_by_shops_in_kgs__c	Number(18, 0)		▼
rice taken in shops	rice_taken_in_shops__c	Number(18, 0)		▼
Rice type	Rice_type__c	Picklist		▼

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Setup Home Object Manager consumer

Details Amount Paid Back to consumer

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

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Amount Paid

Back to consumer

Custom Field Definition Detail

Field Information

Field Label	Amount Paid
Field Name	Amount_Paid
API Name	Amount_Paid_c
Description	Amount Paid
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	PATNAIKA USHARANI 26/12/2024, 10:11 pm
Modified By	PATNAIKA USHARANI 26/12/2024, 10:11 pm

Formula Options

Data Type	Formula
Decimal Places	2

Rice_taken_by_shops_c * rice_mil_name_c / rice_price_kg_c

consumer Custom Field: Amount Paid ~ Salesforce - Developer Edition

Setup Home Object Manager consumer

Details Consumer Name Back to consumer

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

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Consumer Name

Back to consumer

Custom Field Definition Detail

Field Information

Field Label	Consumer Name
Field Name	Consumer_Name
API Name	Consumer_Name_c
Description	Consumer Name
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	PATNAIKA USHARANI 26/12/2024, 10:14 pm
Modified By	PATNAIKA USHARANI 26/12/2024, 10:14 pm

Formula Options

Data Type	Formula
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First_name_c + " " + Last_name_c

consumer Custom Field: Consumer Name ~ Salesforce - Developer Edition

Setup > Object Manager consumer

consumer Validation Rule

Back to consumer

Validation Rule Detail	Edit Close	Active ✓	Help for this Page
Rule Name: Phonenumbersblankrule	Error Condition Formula: OR(ISBLANK(Phone_number_c), ISBLANK(Email_c))		
Error Message: please fill in your phone number.	Description: phone number and email number should not be blank		
Created By: PATHADDA USHARANI	Modified By: PATHADDA USHARANI 28/12/2024, 10:19 pm		
Edit Close			

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 Object Access Triggers Flow Triggers **Validation Rules** Conditional Field Formatting

PAGE LAYOUTS:

Setup > Object Manager consumer

consumer

Save **Quick Save** Preview As... Cancel **Fields** **Buttons** **Text Boxes** **Mobile & Lightning Actions** **Expanded Lookups** **Links** **Report Charts** **Layout Properties**

consumer Detail

Information (Header visible on edit only)
Consumer Name: GEN-2024-00124
rice taken in shop: 59,880
rice taken in shop: 23,731

Personal details

First name: Sample Text
Last name: Sample Text
Consumer Name: Sample Text
Phone number: 9876543210
email: sarah.sample@company.com
 rice mill name: **Sample Text**

Receipt details

Amount Paid: 804.78
Mode of payment: Sample Text

Rice details

Rice Type: Sample Text
Rice taken by shop: 59,897

System Information (Header visible on edit only)
Created By: **Sample Text** **Last Modified By**: **Sample Text**

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only)

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

Related Lists

PROFILES:

OWNER PROFILE:

The screenshot shows the Salesforce Setup interface for managing profiles. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar has 'Users' expanded, with 'Profiles' selected. The main content area is titled 'Profiles' and shows the 'Owner' profile. A message at the top states: '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.' Below this, it says: '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.' A list of permissions follows, including '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 Setting Definitions Access', 'Enabled Flow Access', and 'Enabled Custom Permissions'. The 'Profile Detail' section shows the profile name 'owner', user license 'Salesforce', description 'Salesforce', and created by 'PATIVADA USHARANI' on 27/12/2024 at 2:51 pm. It also indicates 'Custom Profile' is checked and modified by 'PATIVADA USHARANI' on 27/12/2024 at 2:52 pm. The 'Page Layouts' section lists various standard object layouts and alternative payment method layouts. A large list of page layouts for various objects like Invoice, Lead, Legal Entity, Location, Location Group Assignment, Macro, Object Milestone, Operating Hours, Opportunity, Opportunity Product, and Order is shown on the right side.

EMPLOYER PROFILE:

The screenshot shows the Salesforce Setup interface for managing profiles. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar has 'Users' expanded, with 'Profiles' selected. The main content area is titled 'Profiles' and shows the 'employer' profile. A message at the top states: '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.' Below this, it says: '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.' A list of permissions follows, including '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 Setting Definitions Access', 'Enabled Flow Access', and 'Enabled Custom Permissions'. The 'Profile Detail' section shows the profile name 'employer', user license 'Salesforce Platform', description 'Salesforce', and created by 'PATIVADA USHARANI' on 27/12/2024 at 2:54 pm. It also indicates 'Custom Profile' is checked and modified by 'PATIVADA USHARANI' on 27/12/2024 at 2:54 pm. The 'Page Layouts' section lists various standard object layouts and alternative payment method layouts. A large list of page layouts for various objects like Fulfillment Order Item Tax, Fulfillment Order Product, Fulfillment Order Product Line, Individual, Invoice, Location, Location Group Assignment, Location Group Assignment Layout, Macro, Object Milestone, Operating Hours, Opportunity, Opportunity Product, and Order is shown on the right side. A tooltip 'Profile: employer - Salesforce - Developer Edition' is visible over the 'Fulfillment Order Product Line' layout.

WORKER PROFILE:

Setup Home Object Manager

Search Setup

Users Profiles

Profile worker

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

Log IP Pages [] | Enabled Area 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 Setting Definition Access [] | Enabled Service Pipeline Status Access [] | Enabled Custom Permissions []

Profile Detail

Name	worker	User License	Salesforce Platform	Custom Profile	
Description		Created By	PATVADA USHADAN	Modified By	PATVADA USHADAN
					27/12/2024, 2:56 pm

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Fulfillment Order Item Tax Layout [View Assignment]
Email Application	Email Layout [View Assignment]	Fulfillment Order Product Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Individual Layout [View Assignment]
Account	Account Layout [View Assignment]	Invoice Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Invoice Line Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Lead Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Location Layout [View Assignment]
Asset Relationship	Asset Relationship Layout [View Assignment]	Location Group Layout [View Assignment]
Assigned Resource	Assigned Resource Layout [View Assignment]	Object Milestone Layout [View Assignment]
Associated Location	Associated Location Layout [View Assignment]	Operating Hours Layout [View Assignment]
Async Operation Log	Async Operation Log Layout [View Assignment]	Order Layout [View Assignment]
Authorization Form	Authorization Form Layout [View Assignment]	
Authorization Form Consent	Authorization Form Consent Layout [View Assignment]	

ROLE & ROLE HIERARCHY:

Role OWNER

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

Hierarchy: Salesforce > CEO > owner
Siblings: SVP Sales & Marketing, SVP Customer Service & Support, CFO, SVP Human Resources, COO

Role Detail

Label	owner	Role Name as displayed on reports
This role reports to	CEO	Role Name
Modified By	PATNIVADA USHARANI 27/12/2024, 2:58 pm	Sharing Groups
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities	Role, Role and Internal Subordinates
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases	

Users in owner Role

Action	Full Name	Alias	Username	Active
Edit	uditr.vada	IT01	usharivada@exam1.com	✓

Role employer

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

Hierarchy: Salesforce > CEO > owner > employer

Role Detail

Label	employer	Role Name as displayed on reports
This role reports to	owner	Role Name
Modified By	PATNIVADA USHARANI 27/12/2024, 3:01 pm	Sharing Groups
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities	Role, Role and Internal Subordinates
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases	

Users in employer Role

Action	Full Name	Alias	Username	Active
Edit	ram.ram	IT00	usharivada@exam2.com	✓

Role worker

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

Hierarchy: Salesforce > CEO > owner > employer > worker

Role Detail

Label	worker	Role Name as displayed on reports
This role reports to	employer	Role Name
Modified By	PATNIVADA USHARANI 27/12/2024, 3:02 pm	Sharing Groups
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities	Role, Role and Internal Subordinates
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases	

Users in worker Role

Action	Full Name	Alias	Username	Active
Edit	ISQULISI	IT01	usharivada@exam3.com	✓

USERS:

- 1.VICKY
- 2.RAM
- 3.RAGU RAJ

User Detail

Name	vicky y	Role	owner
Alias	vy	User License	Salesforce
Email	ushapativada1610@gmail.com [Verify]	Profile	owner
Username	ushapativada@exam1.com	Active	<input checked="" type="checkbox"/>
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	<input type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
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 Authenticator		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator		Salesforce CRM Content User	<input checked="" type="checkbox"/>
Security Key (2FA or WebAuthn)		Receive Salesforce CRM Content Alerts	<input checked="" type="checkbox"/>

User Detail

Name	ram ram	Role	employee
Alias	ram	User License	Salesforce Platform
Email	ushapativada1610@gmail.com [Verify]	Profile	Standard Platform User
Username	ushapativada@exam2.com	Active	<input checked="" type="checkbox"/>
Nickname	ram	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
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"/>

The screenshot shows the Salesforce Setup interface with the following details:

Setup Home Object Manager

Search Setup

User Detail for **ragu raj**

Role: worker
User License: Salesforce Platform
Profile: Standard Platform User

Active:

Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
Site.com Publisher User:
WDC User:

Mobile Push Registrations: [View](#)

Data.com User Type: [View](#)

Accessibility Mode (Classic Only): [i](#)

Debug Mode: [i](#)

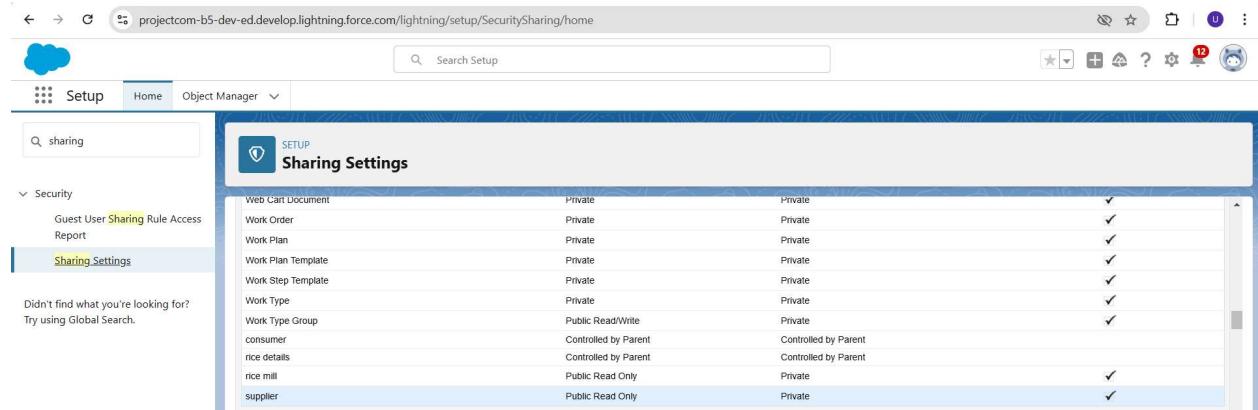
High-Contrast Palette on Charts: [i](#)

User Detail Fields:

Field	Value
Name	ragu raj
Alias	rraj
Email	ushapalitvada1610@gmail.com (Verify) i
Username	ushapalitvada@exam3.com
Nickname	ragura i
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	
Manager	
Receive Approval Request Emails	Only if I am an approver
Federation ID	

Did you find what you're looking for?
Try using Global Search.

PERMISSION SETS:



The screenshot shows the Salesforce Sharing Settings page. The URL is projectcom-b5-dev-ed.lightning.force.com/lightning/setup/SecuritySharing/home. The page title is "Sharing Settings". On the left, there's a sidebar with "Setup" selected, a search bar, and a message: "Didn't find what you're looking for? Try using Global Search.". The main content area displays a table of sharing settings for various objects:

Object	Sharing Rule	Access Level	Controlled By
Web Cart Document	Private	Private	✓
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	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	✓

REPORTS:

Report Name	Description	Folder	Created By	Created On	Subscribed
range of amount per day		estimated rice per day	PATIVADA USHARANI	27/12/2024, 3:51 pm	

Sharing report to owner:

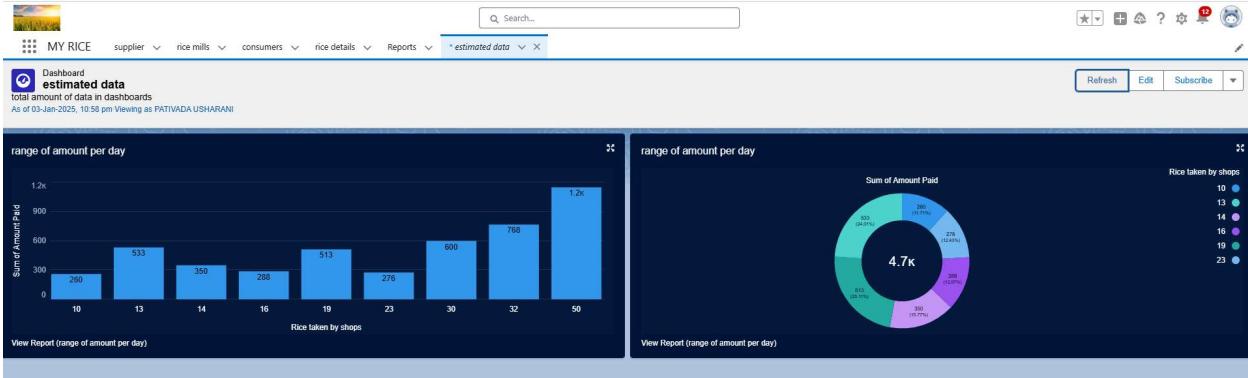
Total Records	Total rice price/kg	Total Amount Paid		
10	216	4,738.00		
Rice taken by shops +				
Consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
moyyi Prashanti	1.basmati	26	Cash	260.00
		26		260.00
revalla sneha	2.normal rice	19	UPI	247.00
jaada sukanya	1.basmati	22	Cash	286.00
		41		533.00
Pativada Usharani	1.basmati	25	Cash	350.00
		25		350.00
mahanti gowthami	2.normal rice	18	UPI	288.00
		18		288.00
Neralla varshini	2.normal rice	27	UPI	513.00
		27		513.00
Chokkakula pravalka	1.basmati	12	Cash	276.00
		12		276.00
Betha swapna	1.basmati	20	Cash	600.00
		20		600.00
Battula Mounika	1.basmati	24	Cash	768.00
		24		768.00
Chepema Greeshma	1.basmati	23	Cash	1,150.00
		23		1,150.00
Total (10)		216		4,738.00

Create a Report Folder:

Name	Created By	Created On	Last Modified By	Last Modified Date
Einstein Bot Reports	Automated Process	25/12/2024, 5:39 pm	Automated Process	25/12/2024, 5:39 pm
Einstein Bot Reports Spring '23	Automated Process	25/12/2024, 5:39 pm	Automated Process	25/12/2024, 5:39 pm
Einstein Bot Reports Summer '23	Automated Process	25/12/2024, 5:39 pm	Automated Process	25/12/2024, 5:39 pm
Einstein Bot Reports Summer '22	Automated Process	25/12/2024, 5:39 pm	Automated Process	25/12/2024, 5:39 pm
Einstein Bot Reports Winter '23	Automated Process	25/12/2024, 5:39 pm	Automated Process	25/12/2024, 5:39 pm
Enabling Dashboard Reports Spring '24	Automated Process	25/12/2024, 5:39 pm	Automated Process	25/12/2024, 5:39 pm
Enabling Dashboard Reports Summer '24	Automated Process	25/12/2024, 5:39 pm	Automated Process	25/12/2024, 5:39 pm
estimated rice per day	PATIVADA USHARANI	27/12/2024, 3:56 pm	PATIVADA USHARANI	27/12/2024, 3:56 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:

The screenshot shows the Salesforce Developer Console interface. The title bar reads "Developer Console - Google Chrome" and the URL is "projectcom-b5-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage". The tab bar has "ConsumerRecord.apxc *" selected. The code editor contains the following Apex class:

```
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
9                  "We are proud to associate with valuable customers :
10                     +'So why taking a step back, take a leap of faith and
11                         'Thankyou for buying ' + ' + 'Here are some of the products
12 Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
13
14     }
15 }
16
17 }
```

Below the code editor is a navigation bar with tabs: Logs, Tests, Checkpoints, Query Editor, View State, Progress, Problems. The "Logs" tab is selected. A status bar at the bottom shows "User Application Operation Time Status Read Size".

The screenshot shows the Salesforce Developer Console interface. The title bar reads "Developer Console - Google Chrome" and the URL is "projectcom-b5-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage". The tab bar has "Saving: consumerTrigger.apxt *" selected. The code editor contains the following Apex trigger:

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

Below the code editor is a navigation bar with tabs: Logs, Tests, Checkpoints, Query Editor, View State, Progress, Problems. The "Logs" tab is selected. A status bar at the bottom shows "User Application Operation Time Status Read Size".

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.