

A CRM APPLICATION FOR WHOLESALE RICE MILL

Report

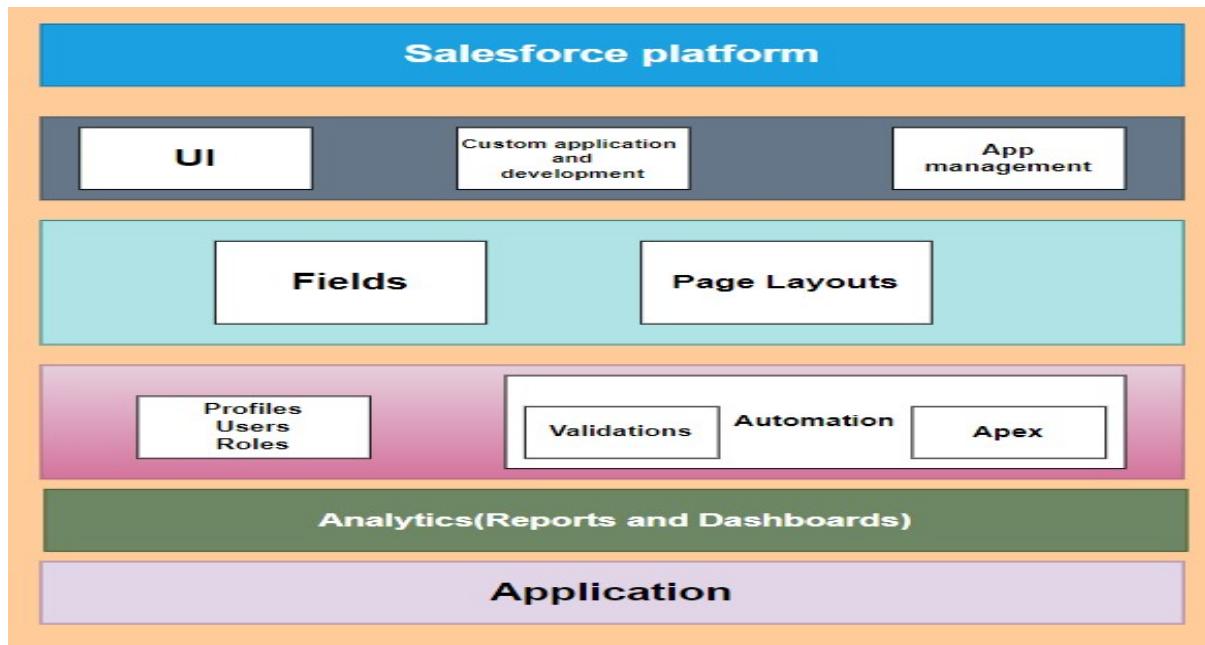
Short Description:

The Rice Mill Crm Streamlines Daily Rice Production and Sales Reporting, Enhancing Efficiency and Customer Experiences.

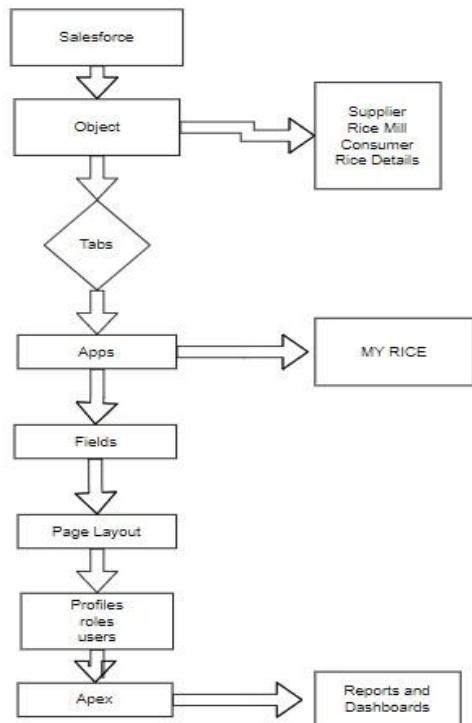
Long Description:

The Rice Mill CRM Application is a comprehensive solution designed to streamline and simplify how much rice per day, how many were sold that rice and which type of rice all reports send to owners daily wise. It leverages the power of customer relationship management (CRM) to enhance customer experiences, optimize store operations, and improve overall efficiency in the rice mill factory. This project aims to develop a user-friendly and feature-rich application that addresses the specific needs of a rice mill factory.

Technical Architecture:



Project Flow:



Features and Functionality:

Reports and Dashboards: The application can generate detailed reports and analytics regarding daily how much rice sold and total income per daily, revenue generated, popular amenities, and most buyed customers. Easy to understand the data to the owner, improving resource allocation, and planning future development.

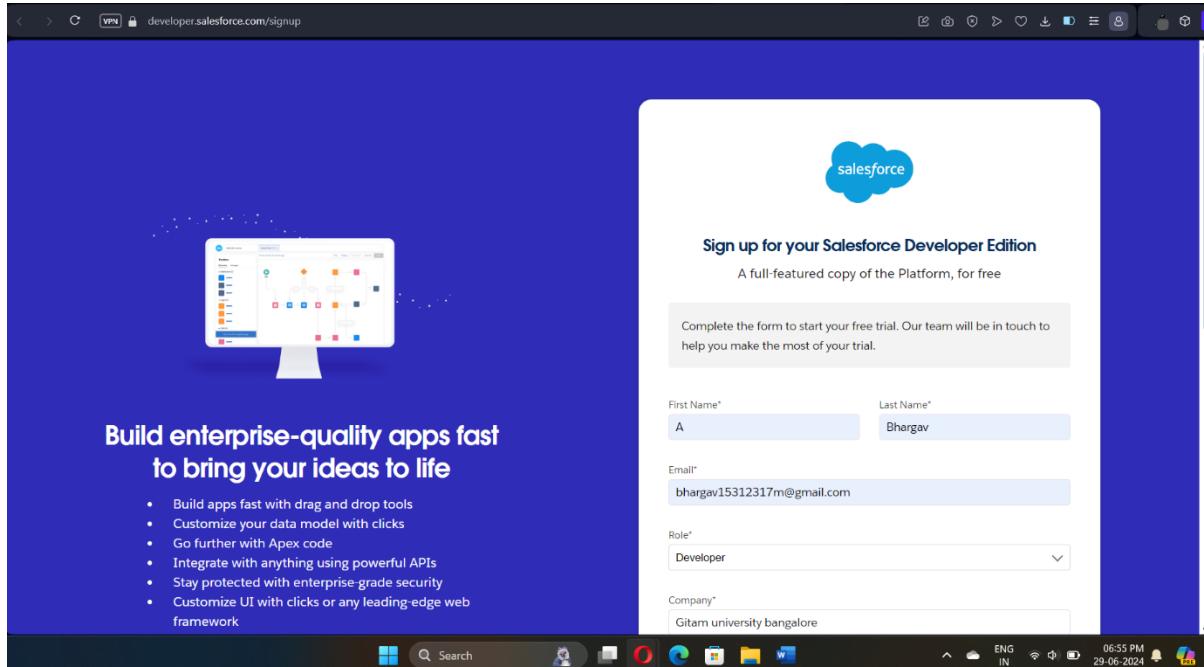
Roll Up Summary Field: This is a field that summarizes data from a child object to a parent object that shares a master-detail relationship. Rollup summary fields can use the COUNT, SUM, MIN, and MAX functions. For example, you could use a rollup summary field to display the total value (amount of rice supplied) from rice details on a related supplier.

Cross Object Formula: It is a formula field that references fields from another object in Salesforce. This type of formula allows users to calculate the total amount from number of rice taken * price/kg and it displays the total amount I have to pay.

Validation Rule: Validation rules also include an error message to display to the user when the rule returns a value of "True" due to an invalid value. So, in this project I gave IsBlank formula. IsBlank formula is used to verify whether it is blank it shows error.

Permission sets: Organization Wide Defaults(OWD) in salesforce is the baseline level of access that the most restricted user should have. Organizational Wide Defaults are used to restrict access. But in our case we created roles and given the roles in such a way that the owner can see employer and worker records, and the employer can see the worker records.

Activity 1: Creating Developer Account:

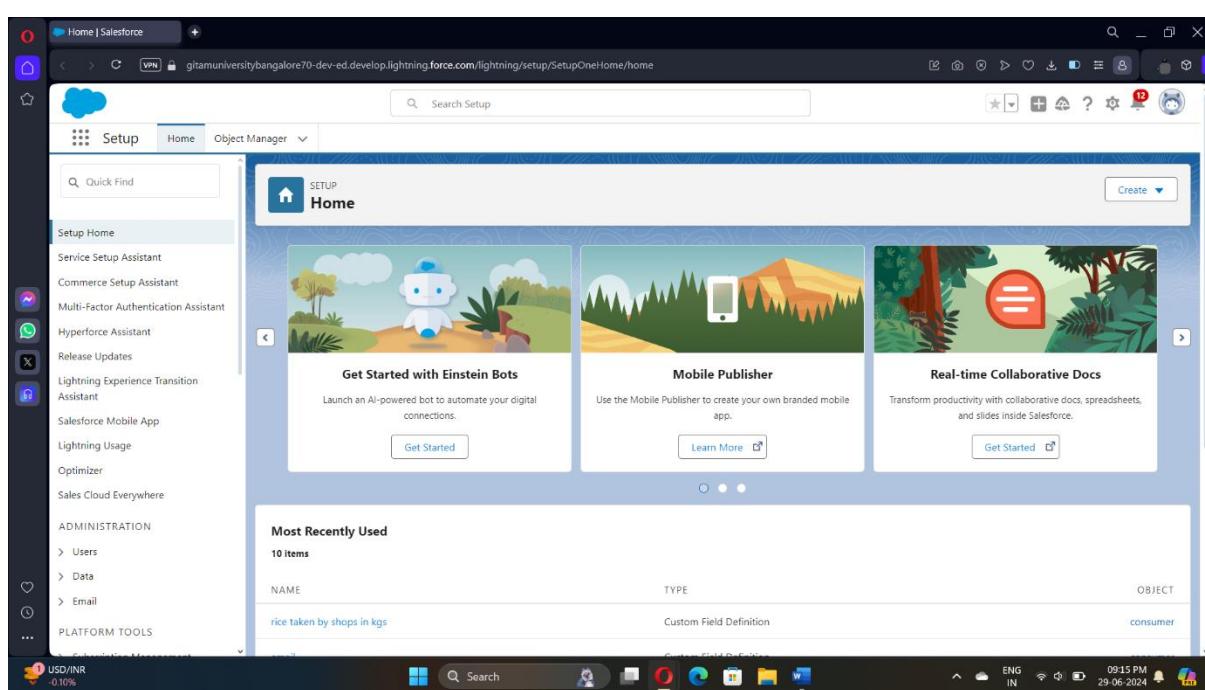
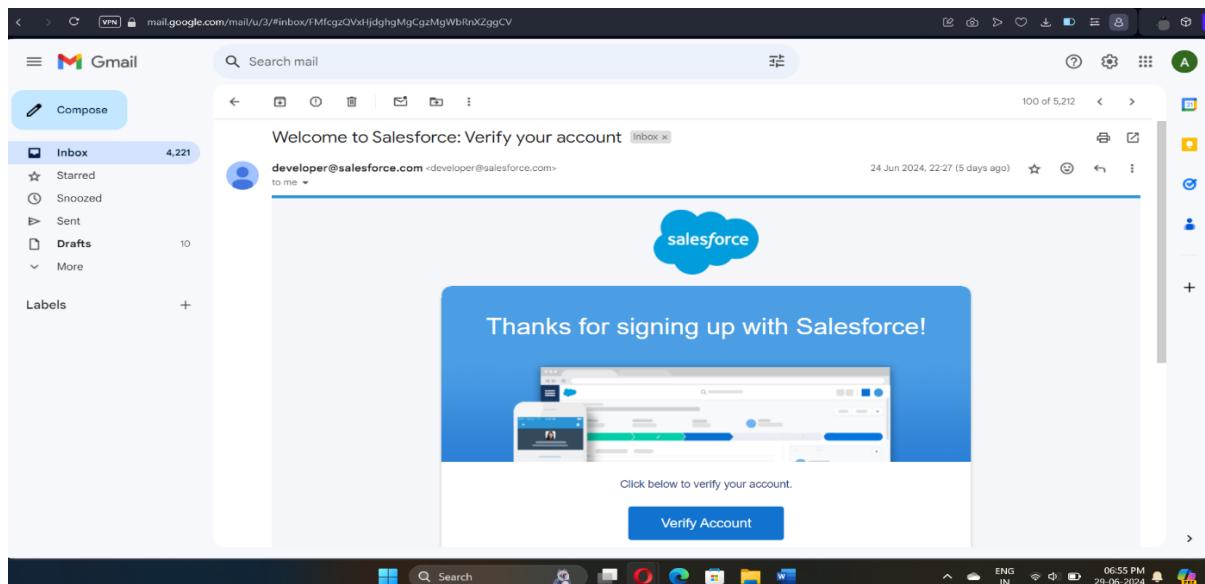


- 1) First name & Last name : A Bhargav
- 2) Email : bhargav15312317m@gmail.com
- 3) Role : Developer
- 4) Company : Gitam university bangalore
- 5) County : India
- 6) Postal Code : 560036

7) Username : bhargav300502@gmail.com

Activity 2: Account Activation:

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.
2. Click on Verify Account
3. Give a password and answer a security question and click on change password.
4. Then you will redirect to your salesforce setup page.

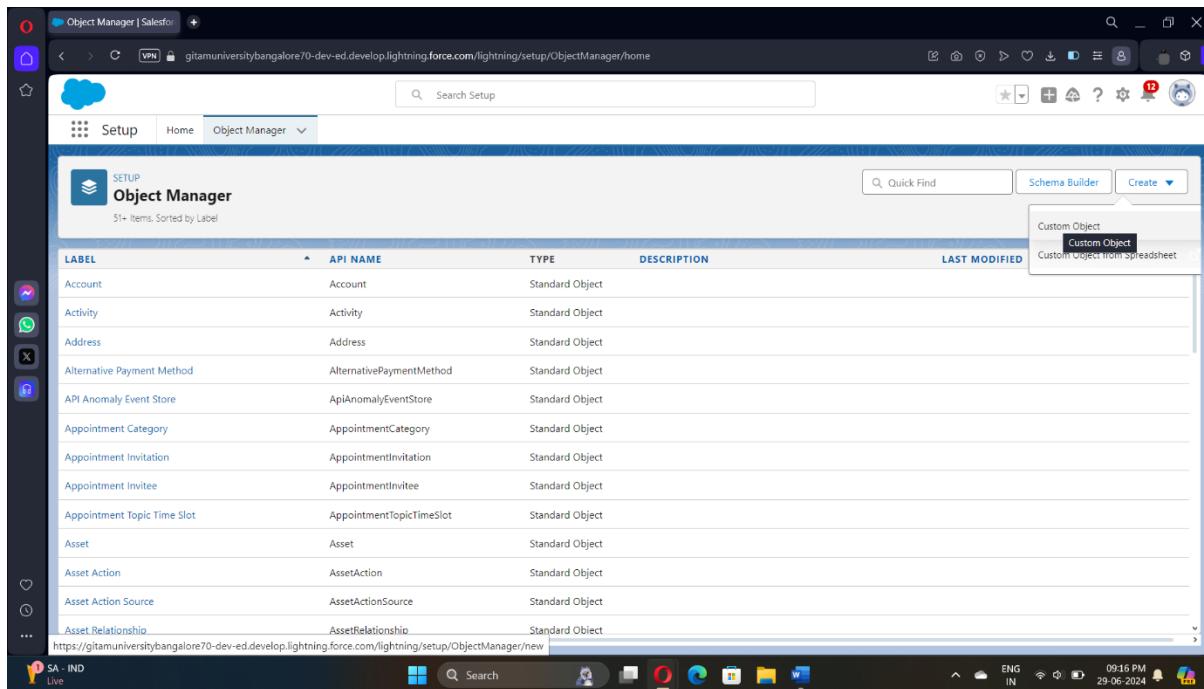


Milestone 2- Object

To Navigate to Setup page:

Click on gear icon → click setup.

1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.



The screenshot shows the Salesforce Object Manager page. At the top, there's a navigation bar with tabs for 'Setup' (selected), 'Home', and 'Object Manager'. A search bar says 'Search Setup'. On the right, there are buttons for 'Quick Find', 'Schema Builder', and 'Create'. Below the navigation is a section titled 'Object Manager' with a sub-section 'Custom Object'. A table lists various objects with columns for 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', and 'LAST MODIFIED'. The table includes rows for Account, Activity, Address, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Asset, Asset Action, Asset Action Source, and Asset Relationship. The 'Asset Action Source' row is currently selected.

Activity 1: Create Supplier Object:

To create an object:

1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
 - 1) Enter the label name → **supplier**
 - 2) Plural label name → **supplier**
 - 3) Enter Record Name Label and Format
 - Record Name → supplier Name
 - Data Type → Text
2. Click on Allow reports and Track Field History and allow search
3. Allow search → **Save**.

The screenshot shows two consecutive screenshots of the Salesforce Setup interface, specifically the 'Object Manager' section for creating a new custom object.

Screenshot 1 (Top):

- Custom Object Definition Edit:** This section contains fields for 'Label' (Supplier) and 'Plural Label' (Suppliers), both with examples of 'Account'. A note states: "The singular and plural labels are used in tabs, page layouts, and reports." There is also a checkbox for "Starts with vowel sound".
- Description:** A large text area for entering a description, currently empty.
- Context-Sensitive Help Setting:** Options include "Open the standard Salesforce.com Help & Training window" (selected) and "Open a window using a Visualforce page".
- Content Name:** A dropdown menu showing options like "Content Page", "Content Type", "Content Version", and "Content Record".

Screenshot 2 (Bottom):

- Object Classification:** A list of checkboxes including "Allow Reports", "Allow Activities", "Track Field History", "Allow in Chatter Groups", and "Enable Licensing".
- Deployment Status:** A radio button group with "In Development" (unchecked) and "Deployed" (checked).
- Search Status:** A checkbox for "Allow Search" which is checked.
- Object Creation Options (Available only when custom object is first created):** Two checkboxes: "Add Notes and Attachments related list to default page layout" and "Launch New Custom Tab Wizard after saving this custom object".

Both screenshots show the standard Salesforce header with tabs like 'Setup', 'Home', and 'Object Manager', and a search bar at the top. The bottom of each screenshot shows a dark taskbar with various application icons and system status indicators.

Activity 2: Create Rice mill Object:

To create an object:

- From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
 - Enter the label name → rice mill
 - Plural label name → rice mills
 - Enter Record Name Label and Format
 - Record Name →
 - Data Type → Auto Number
 - Display Format → rice-{000}

- Starting number → 1
- 2. Click on Allow reports and Track Field History, Allow Search.
- 3. Allow search → Save.

The screenshot shows two consecutive steps in the Salesforce Setup interface for creating a new custom object:

Step 1: Custom Object Definition Edit

- Custom Object Information:**
 - Label: Rice mill
 - Plural Label: rice mills
 - Starts with vowel sound:
- The Object Name is used when referencing the object via the API: Object Name: Rice_mill
- Description: (Empty text area)
- Content Name: –None–
- Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window

Step 2: Object Settings

- Object Settings:**
 - Allow Reports:
 - Allow Activities:
 - Allow Sharing:
 - Allow Bulk API Access:
 - Allow Streaming API Access:
 - Allow Chatter Groups:
 - Enable Licensing:
- 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:**
 - In Development:
 - Deployed:
- Search Status:** When this setting is enabled, your users can find records of this object type when they search. Learn more.
 - Allow Search:
- Object Creation Options (Available only when custom object is first created):**
 - Add Notes and Attachments related list to default page layout:
 - Launch New Custom Tab Wizard after saving this custom object:

Activity 3: Create consumer Objects:

Note: Follow the same steps as mentioned in Activity 2 for the and Receipt objects.

1. Use these display format for the **consumer**

- label name → **consumer**
- Plural label name → **consumers**
- Display Format → **consumers-{000}**
- Starting number → 1

The screenshot shows two consecutive screenshots of the Salesforce Object Manager interface, both titled "New Custom Object".

Screenshot 1 (Top): The "Custom Object Information" section is visible. The "Label" field contains "consumer" and the "Plural Label" field contains "consumers". Both fields have "Example: Account" next to them. A note at the top states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles." Below the fields, there's a "Description" text area and a "Context-Sensitive Help Setting" section with options for "Open the standard Salesforce.com Help & Training window" and "Open a window using a Visualforce page".

Screenshot 2 (Bottom): The "Optional Features" section is visible, showing checkboxes for "Allow Reports", "Track Field History", and "Allow in Chatter Groups". The "Object Classification" section shows checkboxes for "Allow Sharing", "Allow Bulk API Access", and "Allow Streaming API Access". The "Deployment Status" section has "Deployed" selected. The "Search Status" section has "Allow Search" checked. The "Object Creation Options" section has checkboxes for "Add Notes and Attachments related list to default page layout" and "Launch New Custom Tab Wizard after saving this custom object".

Activity 4: Create rice details Objects:

2. Use these display format for the rice details

- label name → rice details
- Plural label name → rice details
- Display Format → rice-{000}

Starting number → 1

The screenshot shows two consecutive steps in the Salesforce Setup interface for creating a new custom object.

Step 1: Custom Object Definition Edit - New Custom Object

- Custom Object Information:**
 - Label: rice details
 - Plural Label: rice details
 - Starts with vowel sound:
- The Object Name is used when referencing the object via the API.
 - Object Name: rice_details
 - Example: Account
- Description: (Empty text area)
- Context-Sensitive Help Setting:
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
- Content Name: (None)

Step 2: Optional Features - New Custom Object

- Optional Features:**
 - Allow Reports
 - Allow Activities
 - Track Field History
 - Allow in Chatter Groups
 - Enable Licensing
- 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:**
 - In Development
 - Deployed
- Search Status:**

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

 - Allow Search
- Object Creation Options (Available only when custom object is first created):**
 - Add Notes and Attachments related list to default page layout
 - Launch New Custom Tab Wizard after saving this custom object

Milestone 3- Tabs

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. Select Object(supplier) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.

Activity 2: Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “ rice mill, **consumer** , rice details”.
2. Follow the same steps as mentioned in Activity -1 .

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

- Header:** Tabs | Salesforce
- Search Bar:** Q Search Setup
- Left Navigation:** Setup, Home, Object Manager, User Interface, Rename Tabs and Labels, **Tabs**.
- Central Content:**
 - Custom Tabs:** You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
 - Custom Object Tabs:** A table showing existing tabs:

Action	Label	Tab Style	Description
Edit Del	consumers	People	
Edit Del	rice details	Safe	
Edit Del	rice mills	Factory	
Edit Del	supplier	Box	
 - Web Tabs:** No Web Tabs have been defined.
 - Visualforce Tabs:** No Visualforce Tabs have been defined.
- Bottom:** Weather (26°C, Mostly clear), Search bar, and various system icons.

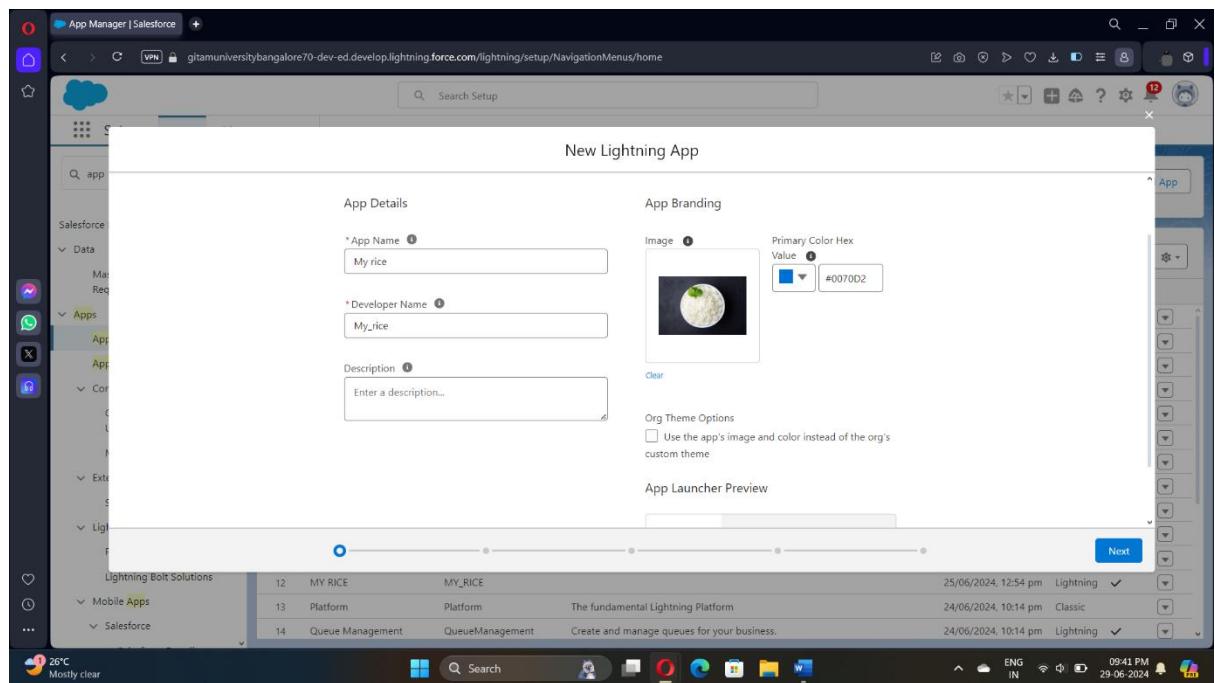
Milestone 4- The Lightning App:

Activity 1: Create a Lightning App

To create a lightning app page:

1. Go to setup page → search “app manager” in quick find → select “app manager” → click on New lightning App.
2. Fill the app name in app details as MY RICE → Next → (App option page) keep it as default → Next → (Utility Items) keep it as default → Next.
3. Upload a photo that is related to your app.
4. To Add Navigation Items:
5. Select the items (supplier, rice mill, consumer , Rice details) from the search bar and move it using the arrow button → Next.
6. To Add User Profiles:

Search profiles (System administrator) in the search bar → click on the arrow button → save & finish.



Milestone 5 : Fields

Activity 1: Creating the number field in rice details object

Creating the number field in rice details object

1. Go to the setup page → click on object manager → From drop down click edit for rice details object.
2. Click on fields & relationship → click on New.
3. Select Data type as “Number” and click Next.
4. Given the Field Label as “rice distributed ” and length as “ 5 ”.

The image consists of two screenshots of the Salesforce Setup interface, both titled "rice details".

Screenshot 1: Step 2. Enter the details

This screenshot shows the configuration of a new custom field named "rice_distributed". The "Field Label" is set to "rice distributed". The "Length" is set to 5, and "Decimal Places" is set to 0. Other settings include:

- Field Name:** rice_distributed
- Description:** (empty)
- Help Text:** (empty)
- Required:** Always require a value in this field in order to save a record
- Unique:** Do not allow duplicate values
- External ID:** Set this field as the unique record identifier from an external system
- AI Prediction:** Use this field to store AI prediction scores

Screenshot 2: Fields & Relationships

This screenshot shows the list of available field types. The "Number" type is selected, and its description is visible:

Allows users to enter any number. Leading zeros are removed.

Other field types listed include Date, Date/Time, Email, Geolocation, Percent, Phone, Picklist, Multi-Select, Text, Text Area (Long), Text Area (Rich), Text (Encrypted), Time, and URL.

Activity 2 : Creating Junction Object :

A Junction object is a custom object that serves as a bridge between two related objects in a many-to-many relationship. It allows you to create a relationship between records of two different objects by creating a many-to-many relationship model.

Creating junction object as rice details with supplier & rice mill

To create junction object

1. Go to the setup page → click on object manager → From drop down click edit for rice details object.
2. Click on fields & relationship → click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. Select the related object “ supplier ” and click next.
5. Give Field Label as “supplier Name” and click Next.
6. Next → Next → Save & New.
7. Follow the same steps from 1 to 3.
8. Select the related object “ rice mill ” and click Next.
9. Give Field Label as “rice mill 1(one)” and click Next.
10. Next → Next → Save.

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

- Page Header:** Rice mill dashboard | Sale: supplier | Salesforce
- Search Bar:** Search Setup
- Left Sidebar:** Includes icons for Home, Object Manager, and various setup categories like Page Layouts, Lightning Record Pages, Buttons, etc.
- Current Page:** SETUP > OBJECT MANAGER > supplier
- Section:** Fields & Relationships
- Table:** Displays field information with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.
- Data in Table:**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
rice distributed to shops	rice_distributed_to_shops_c	Roll-Up Summary (SUM rice details)		
sum of rice distributed	sum_of_rice_distributed_c	Roll-Up Summary (SUM rice details)		
supplier Name	Name	Text(80)		✓

The screenshot shows the Salesforce Object Manager interface for the 'rice mill' object. The left sidebar has a 'Fields & Relationships' section with various layout and action options. The main area displays a table titled 'Fields & Relationships' with the following data:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
rice distributed to shops	rice_distributed_to_shops_c	Roll-Up Summary (SUM rice details)		
rice mill Name	Name	Auto Number		✓
rice price/kg	rice_price_kg_c	Number(5, 0)		
rice taken	rice_taken_c	Roll-Up Summary (SUM consumer)		

Activity 3 : Creating a Master-Detail Relationship

Creating Master-Detail Relationship between consumer & rice mill Object

To Create a Master-Detail relationship

1. Go to the setup page → click on object manager → From drop down click edit for consumer object.
2. Click on fields & relationship → click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. Select the related object “rice mill”.
5. Give Field Label as “rice mill name” and click Next.

6. Next → Next → Save.

The image displays two side-by-side screenshots of the Salesforce Object Manager Fields & Relationships page. Both pages show a table of fields for their respective objects: 'rice mill' and 'consumer'.

Rice Mill Fields & Relationships:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
rice distributed to shops	rice_distributed_to_shops_c	Roll-Up Summary (SUM rice details)		
rice mill Name	Name	Auto Number		✓
rice price/kg	rice_price_kg_c	Number(5, 0)		
rice taken	rice_taken_c	Roll-Up Summary (SUM consumer)		

Consumer Fields & Relationships:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid_c	Formula (Number)		
Consumer Name	Consumer_Name_c	Formula (Text)		
consumer Name	Name	Auto Number		✓
Created By	CreatedBy	Lookup(User)		
email	email_c	Email		
First name	First_name_c	Text(10)		
Last Modified By	LastModifiedBy	Lookup(User)		
Last name	Last_name_c	Text(10)		
Mode of payment	Mode_of_payment_c	Picklist		

Activity 4 : Creating the Roll-up Summary

Creating the Roll-up summary field on supplier & rice mill Objects.

1. Go to setup → click on Object Manager → type object name(supplier) in search bar → click on the object.
2. Now click on “Fields & Relationships” → New
3. Select the data type as “Rollup summary ”,and click Next.
4. Give the Field label as “ sum of rice distributed ”,Field Name will be Auto generated, and click Next.
5. Select the summarized object as “ rice details ”.
6. Select the Rollup type as “sum”.
7. Select the field to aggregate as “ rice distributed ”, and click Next → Next → Save.
8. Follow the same steps for the rice mill Object from 1 to 3
9. Give the Field label as “ rice distributed to shops ”,Field Name will be Auto generated, and click Next.
10. Select the summarized object as “ rice details ”.
11. Select the Rollup type as “sum”.
12. Select the field to aggregate as “ rice distributed ”, and click Next → Next → Save.
13. **Note :** create the field as “ rice taken by shops in kgs” using number datatype in consumer object
14. Follow the same steps for the rice mill Object from 1 to 3
15. Give the Field label as “ rice taken ”,Field Name will be Auto generated, and click Next.
16. Select the summarized object as “ consumer”.
17. Select the Rollup type as “sum”.
18. Select the field to aggregate as “ rice taken in shops ”, and click Next → Next → Save.

The image consists of two vertically stacked screenshots of the Salesforce setup interface, specifically the Object Manager.

Screenshot 1: rice mill Object Manager

- Left Sidebar:** 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.
- Table:** Fields & Relationships (7 items, sorted by Field Label)
 | FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
| --- | --- | --- | --- | --- |
| Created By | CreatedById | Lookup(User) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| rice distributed to shops | rice_distributed_to_shops_c | Roll-Up Summary (SUM rice details) | | |
| rice mill Name | Name | Auto Number | | ✓ |
| rice price/kg | rice_price_kg_c | Number(5, 0) | | |
| rice taken | rice_taken_c | Roll-Up Summary (SUM consumer) | | |

Activity 5 : Creating Fields in Objects

Creating the number field in rice details object

1. Go to the setup page → click on object manager → From drop down click edit for rice details object.
2. Click on fields & relationship → click on New.
3. Select Data type as “Number” and click Next.
4. Given the Field Label as “ supplier name ” and length as “ 5 ”.
5. Field Name will be auto populated, and click on Next→ Next → Save.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
rice details Name	Name	Auto Number		✓
rice distributed	rice_distributed__c	Number(5, 0)		
rice mill 1(one)	rice_mill_1_one__c	Master-Detail(rice mill)		✓
Rice taken by shops	Rice_taken_by_shops__c	Number(5, 0)		
Rice type	Rice_type__c	Picklist		
supplier Name	supplier__c	Master-Detail(supplier)		✓

Activity 6: Creating Fields in rice mill Objects

1. Select Data type as “Number” and click Next.
2. Given the Field Label as “ rice price/kg ” and length as “ 5 ”

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
rice distributed to shops	rice_distributed_to_shops__c	Roll-Up Summary (SUM rice details)		
rice mill Name	Name	Auto Number		✓
rice price/kg	rice_price_kg__c	Number(5, 0)		
rice taken	rice_taken__c	Roll-Up Summary (SUM consumer)		

Activity 7: Creating Fields in consumer Objects

The screenshot shows the Salesforce Setup interface for the consumer object. The left sidebar includes links for Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area displays the 'Fields & Relationships' section with 14 items, sorted by Field Label. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
First name	First_name__c	Text(10)		
Last Modified By	LastModifiedById	Lookup(User)		
Last name	Last_name__c	Text(10)		
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 type	Rice_type__c	Picklist		
email	email__c	Email		
Created By	CreatedById	Lookup(User)		
consumer Name	Consumer_Name__c	Formula (Text)		
consumer Name	Name	Auto Number		
First name	First_name__c	Text(10)		
Last name	Last_name__c	Text(10)		
Mode of payment	Mode_of_payment__c	Picklist		

This screenshot shows the same setup as the first one, but the table structure is different, indicating a secondary view or a filtered list. The columns are labeled FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid__c	Formula (Number)		
Consumer Name	Consumer_Name__c	Formula (Text)		
consumer Name	Name	Auto Number		
Created By	CreatedById	Lookup(User)		
email	email__c	Email		
First name	First_name__c	Text(10)		
Last Modified By	LastModifiedById	Lookup(User)		
Last name	Last_name__c	Text(10)		
Mode of payment	Mode_of_payment__c	Picklist		

Activity 8 : Creating Cross Object Formula Field in consumer Object

1. Go to setup → click on Object Manager → type object name(consumer) in search bar → click on the object.
2. Click on fields & relationship → click on New.
3. Select Data type as “Formula” and click Next.
4. Give Field Label and Field Name as “Amount Paid ” and select formula return type as “Number” and click next.
5. Insert fields formula should be :

rice_taken_by_shops_c * rice_mill_name__r.rice_price_kg_c

6. Under Advanced Formula write down the formula and click “Check Syntax” and Save.

Creating the Formula field in consumer Object

7. Go to setup → click on Object Manager → type object name(consumer) in search bar → click on the object.
8. Click on fields & relationship → click on New.
9. Select Data type as “Formula” and click Next.
10. Give Field Label and Field Name as “Consumer Name” and select formula return type as “TEXT” and click next.
11. Insert field formula should be : First_Name__c + ' ' + Last_Name__c
12. click “Check Syntax” and Save.

The screenshot shows the Salesforce Setup interface for the 'consumer' object. In the 'Fields & Relationships' section, there is one item listed:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid_c	Formula (Number)		Indexed

Activity 9 : Creating the validation rule

Creating the validation rule for phone number field in consumer object

1. Go to the setup page → click on object manager → From drop down click edit for consumer object.
2. Click on the validation rule → click New.
3. Enter the Rule name as “Phonenumberoremailblankrule”.
4. Enter the description as “phone number and email number should not be blank”.
5. Enter the formula as “OR(ISBLANK(phone_number_c), ISBLANK(email_c))” and check the syntax.
6. Under the error message write as “please fill in your phone number.”
7. Select error location “top of page”.
8. Save the validation rule.

consumer | Salesforce

gitamuniversitybangalore70-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM0000019gM2/ValidationRules/03ddM000001p7uv/edit

Setup Home Object Manager consumer

SETUP > OBJECT MANAGER consumer

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

Validation Rule Edit

Rule Name: Phonenumbereoremailblankrule

Active:

Description: phone number and email number should not be blank

Error Condition Formula:

Example: Discount_Percent_c>0.30 More Examples

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

Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign

Check Syntax

Quick Tips

R = Required Information

Insert Field Insert Operator

26°C Mostly clear

consumer | Salesforce

gitamuniversitybangalore70-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM0000019gM2/ValidationRules/03ddM000001p7uv/edit

Setup Home Object Manager consumer

SETUP > OBJECT MANAGER consumer

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

Error Message

Example: Discount_percent cannot exceed 30%

This message will appear when Error Condition formula is true

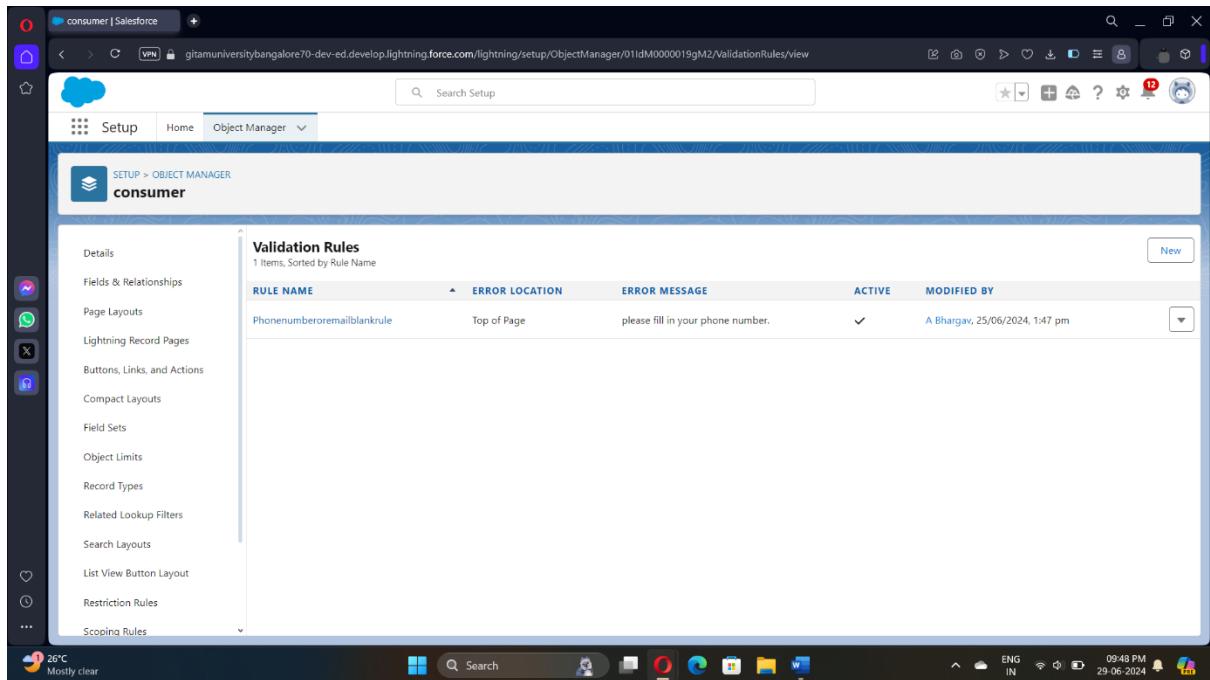
Error Message: please fill in your phone number.

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

Save Save & New Cancel

26°C Mostly clear



Milestone 6 : Page layouts

Activity 1 : creating the page layout

To Create a Page layout:

1. Go to Setup → Click on Object Manager → Search for the object (consumer) → From drop down select the object and click on it.
2. Click on Page layout → Click on New.
3. Select the existing page layout, and give the page layout name as “consumer layout”, and click save.
4. Drag and drop the section field to consumer details and create the section.
5. Enter the section name as “Personal details”, → click Ok.
6. Now drag the fields to this section that mentioned , they are
 - First name , last name , consumer name , phone number, email, rice mill name.
7. Follow the same process for another two sections as shown above , they are
8. One section is “ rice details ” , drag the fields that are
 - Rice taken by shop, rice type.
9. Another section is “Receipt details ”, and drag the fields that are
 - Mode of payment , Amount paid.
10. Then , Click save.

The screenshot shows the Salesforce Setup interface for the 'consumer' object. The left sidebar lists various configuration options under 'Page Layouts'. The main area displays the 'consumer Layout' configuration screen. The 'Fields' section contains fields like Consumer Name, Last Modified By, and Rice mill name. A 'Quick Find' search bar is at the top. Below it is a table with columns for Field Name and Type. The right side features a 'Highlights Panel' for 'consumer Sample' and sections for 'Quick Actions in the Salesforce Classic Publisher' and 'Salesforce Mobile and Lightning Experience Actions'.

consumer | Salesforce

SETUP > OBJECT MANAGER consumer

consumer Layout

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

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Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name *

Field Name	Type
Consumer Name	Text
Created By	User
Last Modified By	User
Rice mill name	Text
Blank Space	Text
Amount Paid	Text
Created By	User
Last name	Text
Mode of payment	Text
Rice taken by shops	Text
consumer Name	Text
First name	Text
Phone number	Text
Rice type	Text

consumer Sample

Highlights Panel

Customize the highlights panel for this page layout.

Quick Actions in the Salesforce Classic Publisher

Actions

Actions in this section are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning Experience Actions

Actions

Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in this section, they will not appear in the global publisher layout.

26°C Mostly clear

Setup Home Object Manager

Search Setup

ENG IN 09:50 PM 29-06-2024

The top screenshot shows the 'Layout Properties' screen for the 'consumer' object. It displays a grid of fields including 'Consumer Name', 'Last Modified By', 'rice mill name', 'Section', 'Created By', 'Last name', 'rice taken by shops', 'Blank Space', 'email', 'Mode of payment', 'rice taken by sh...', 'Amount Paid', 'First name', 'Phone number', and 'rice type'. Below the grid, there are sections for 'rice details' (Rice taken by shops: 47,533, Rice type: Sample Text), 'Receipt details' (Mode of payment: Sample Text, Amount Paid: 783.46), and 'Mobile Cards (Salesforce mobile only)'.

The bottom screenshot shows the 'Page Layouts' list screen for the 'consumer' object. It lists one item: 'consumer Layout' created by 'A Bhargav' on '24/06/2024, 11:02 pm' and modified by 'A Bhargav' on '25/06/2024, 2:08 pm'.

Milestone 7 : Profiles

Activity 1: owner Profile

To create a new profile:

1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (Standard User) → enter profile name (owner) → Save.
2. Scroll down to Custom Object Permissions and Give access permissions for consumers, rice details , rice mill and suppliers objects as mentioned in the below diagram.
3. Give access and save it.

Activity 2: employer Profile

1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (Standard Platform User) → enter profile name (employer) → Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the rice mill..
4. Scroll down to Custom Object Permissions and Give access permissions for consumer, rice details , rice mill and suppliers objects as mentioned in the below diagram.

Activity 3: worker Profile

1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (Standard Platform User) → enter profile name (worker) → Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the rice mill.
4. Scroll down to Custom Object Permissions and Give access permissions for consumer, rice details , rice mill and suppliers objects as mentioned in the below diagram.
5. And click save.

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

- Page Header:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Sidebar:** Setup, Home, Object Manager, and a search bar for "profiles".
- Current Page:** SETUP Profiles
- Profile Name:** Standard User
- User License:** Salesforce
- Created By:** salesforce.com, inc., 24/06/2024, 10:14 pm
- Modified By:** A.Bhargav, 28/06/2024, 10:45 pm
- Page Layouts:** A table showing standard object layouts assigned to various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, Location Group Assignment, Macro, Object Milestone, Operating Hours, Opportunity, and Opportunity Product.
- Permissions:** A list of enabled permissions for this profile, including Login IP Ranges, Apex Class Access, Visualforce Page Access, External Data Source Access, Named Credential Access, External Credential Principal Access, Custom Metadata Type Access, Custom Setting Definitions Access, Flow Access, Service Presence Status Access, and Custom Permissions.

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

Header: Profiles | Salesforce

Search Bar: Search Setup

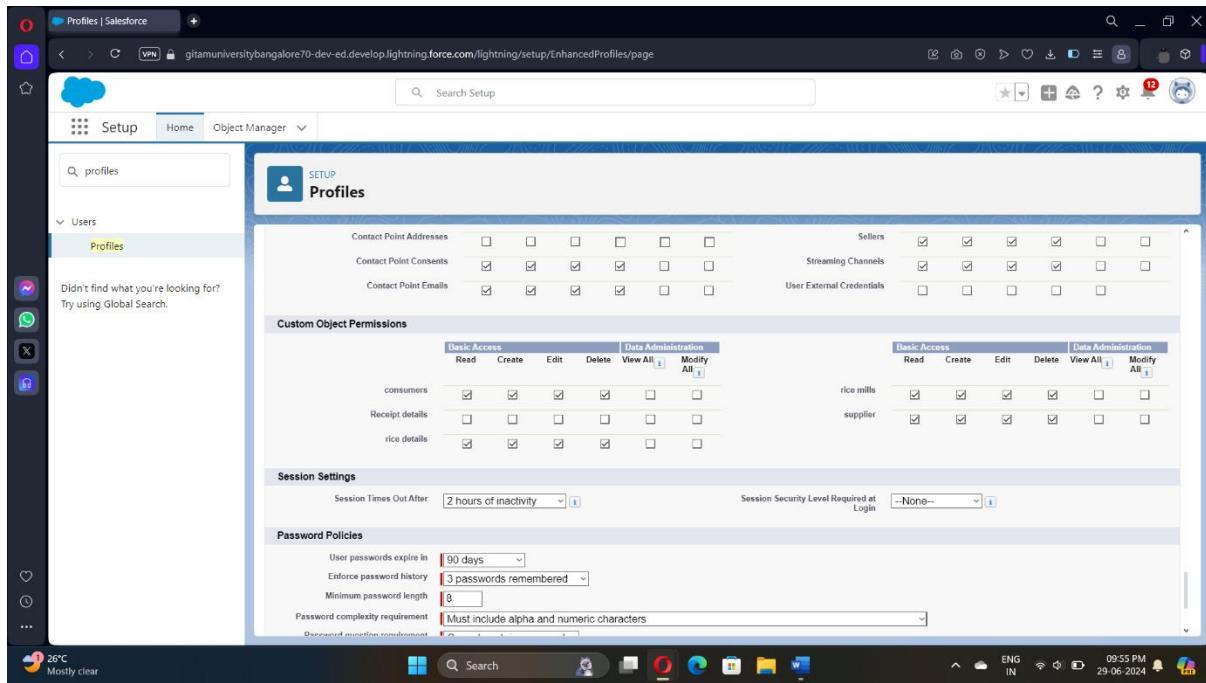
Left Sidebar: Setup, Home, Object Manager, Q profiles, Users, Profiles (highlighted). A message says "Didn't find what you're looking for? Try using Global Search."

Main Content:

- Custom Object Layouts:**
 - Location: [View Assignment] Location Layout [View Assignment]
 - Location Group: [View Assignment] Location Group Layout [View Assignment]
 - Consumer: consumer Layout [View Assignment]
 - Receipt details: Receipt details Layout [View Assignment]
 - Rice details: rice details Layout [View Assignment]
- Work Type Group Member:**
 - rice mill: [View Assignment] rice mill Layout [View Assignment]
 - supplier: [View Assignment] supplier Layout [View Assignment]
- Article Type Layouts:** (List of layouts)
- Field-Level Security:**
 - Standard Field-Level Security:** Account [View], Address [View], Alternative Payment Method [View], API Anomaly Event Store [View], Appointment Category [View], Appointment Invitation [View], Appointment Invitee [View], Appointment Topic Time Slot [View], Asset [View], Asset Action [View], Asset Action Source [View], Asset Relationship [View].
 - Opportunity:** Opportunity Contact Role [View], Opportunity Product [View], Orchestration Run [View], Orchestration Stage Run [View], Orchestration Step Run [View], Orchestration Work Item [View].
 - Order:** Order [View], Order Product [View], Party Consent [View], Payment [View].
 - Payment:** Payment Authorization [View], Payment Authorization Adjustment [View].

Bottom Navigation: ENG IN 09:53 PM 29-06-2024

Second Window (Duplicate View): This window has identical content to the first, showing the Enhanced Profiles settings.



Milestone 8 : Role & Role Hierarchy

Activity 1: Creating owner Role

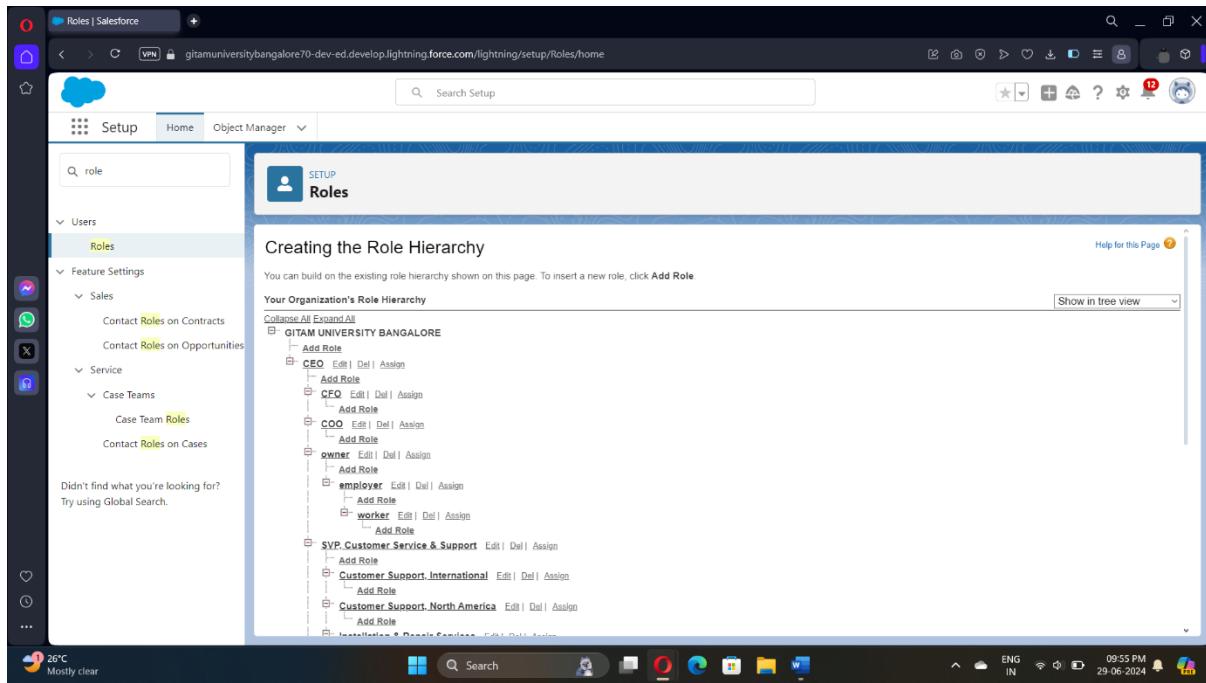
Creating owner Role:

1. Go to quick find → Search for Roles → click on set up roles.
2. Go to quick find → Search for Roles → click on set up roles.
3. Click on Expand All and click on add role under whom this role works.
4. Give Label as “owner” and Role name gets auto populated. Then click on Save.
5. Click and save it.

Activity 2: Creating employer roles

Creating another two roles under manager

1. Go to quick find → Search for Roles → click on set up roles.
2. Click plus on CEO role, and click add role under owner.
3. Give Label as “employer” and Role name gets auto populated. Then click on Save.
4. Repeat the same steps, for another role.
5. Click plus on CEO role, and click plus on owner, and click add role under employer
6. give Label as “worker” and Role name gets auto populated. Then click on Save.



Milestone 9 : Users

1. Go to setup → type users in quick find box → select users → click New user.
2. Fill in the fields
3. First Name : Vicky
4. Last Name : y
5. Alias : Give a Alias Name
6. Email id : Give your Personal Email id
7. Username : Username should be in this form: [text@text.text](#)
8. Nick Name : Give a Nickname
9. Role : owner
10. User license : Salesforce
11. Profiles : owner.

Activity 2: creating another users

1. Go to setup → type users in quick find box → select users → click New user.
2. Fill in the fields
3. First Name: ram
4. Last Name : ram
5. Alias : Give a Alias Name
6. Email id : Give your Personal Email id
7. Username : Username
8. Nick Name: Give a Nickname
9. Role : employer
10. User license : Salesforce platform
11. Profiles : standard platform user.

12. Go to setup → type users in quick find box → select users → click New user.
13. Fill in the fields
14. First Name: ragu
15. Last Name : raj
16. Alias : Give a Alias Name
17. Email id : Give your Personal Email id
18. Username : Username should be in this form: text@text.text
19. Nick Name : Give a Nickname
20. Role : worker
21. User license : Salesforce platform
22. Profiles : standard platform user.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes a blue cloud icon, the word "Setup", and links for "Home" and "Object Manager". A search bar says "Search Setup". On the left, a sidebar menu is open under the "Users" section, showing options like "Permission Set Groups", "Permission Sets", "Profiles", "Public Groups", "Queues", "Roles", "User Management Settings", and "Prospector Users". The "Users" option is highlighted with a yellow box. Below the sidebar, a message says "Didn't find what you're looking for? Try using Global Search." The main content area is titled "New User" and shows a "User Edit" form. The "General Information" tab is selected. The form fields are as follows:

	Value
First Name	vicky
Last Name	y
Alias	vy
Email	bhargav15312317m@gmail.com
Username	bhargav15312317m@gmail.com
Nickname	vicky
Title	(empty)
Company	(empty)
Department	(empty)
Division	(empty)

Buttons at the top right of the form are "Save", "Save & New", and "Cancel".

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Bharay_A	ABhar	bharay30052002@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Chatter_Expert	Chatter	chatty.00dm000005k43uae.85tukj0yw@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	r@gu	r@gu	r@gu@gtam.in	worker	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	ram_ram	ram	bharay15312317m@gmail.com	employer	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dm000005k43uae.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00dm000005k43uae.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/> Edit	y_vicky	YV	bharay3270@gmail.com	owner	<input checked="" type="checkbox"/>	owner

Milestone 10 : Permission sets

Activity 1: Creating OWD setting.

1. Go to setup → type “sharing settings ” in quick search → Click edit.
2. Scroll down, change the default internal access to “ public read-only” for rice mill and supplier object.
3. Click save.
4. Extra information, By these every profile has their own access, according to their profile.
5. But in our case we created roles and given the roles in such a way that the owner can see employer and worker records , and the employer can see the worker records.

The screenshot shows the Salesforce Setup interface with the 'Sharing Settings' page open. The left sidebar has a search bar and lists 'Security' items like 'Guest User Sharing Rule Access' and 'Sharing Settings'. The main content area is titled 'Sharing Settings' and contains a table of sharing rules for various objects. The table has two columns of dropdown menus for 'Sharing Rule' and 'Sharing Object'. Most dropdowns show 'Private' as the selected value. A few dropdowns show other options like 'Public Read Only' or 'Public Read/Write'. At the bottom of the page are 'Other Settings' checkboxes for 'Standard Report Visibility', 'Manual User Record Sharing', 'Manager Groups', and 'Secure guest user record access'. Below these are 'Save' and 'Cancel' buttons.

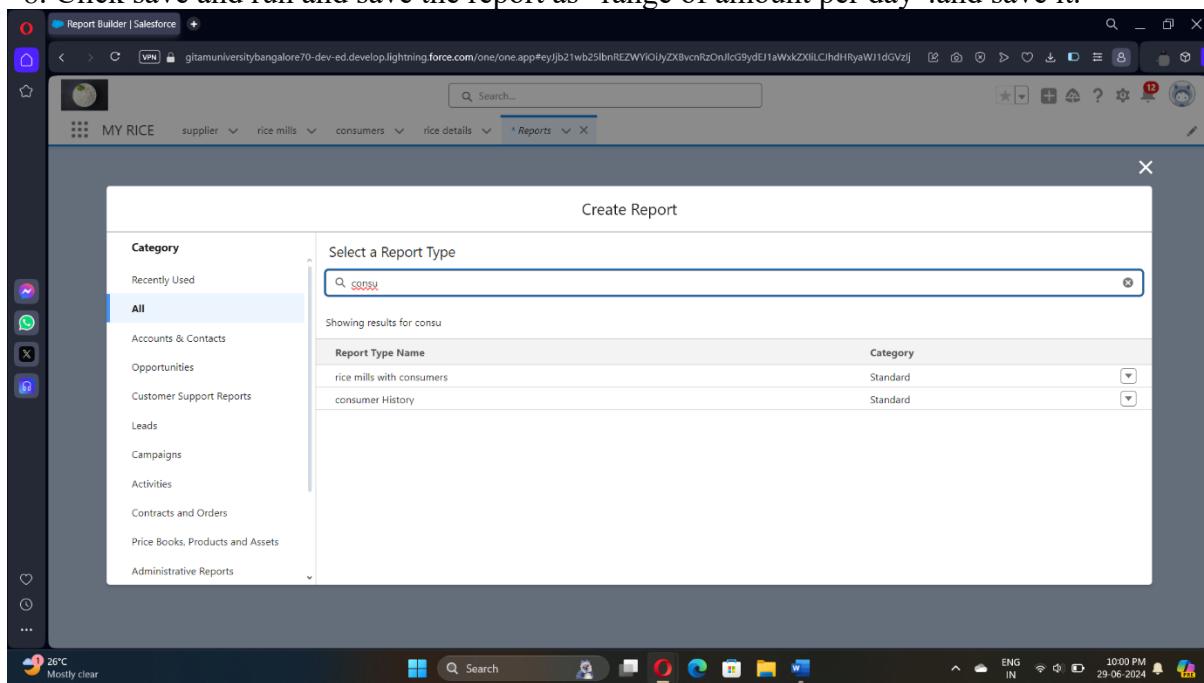
create the latest “10” records in consumer objects.

The screenshot shows the Salesforce Lightning interface with the 'rice mills' object list open. The top navigation bar includes 'MY RICE' and tabs for 'supplier', 'rice mills', 'consumers', and 'rice details'. The main content area displays a list of 11 recently viewed 'rice mill' records. Each record is represented by a row with a checkbox and a name. The names are listed in descending order of creation: rice-011, rice-010, rice-009, rice-008, rice-007, rice-006, rice-005, rice-004, rice-003, rice-002, and rice-001. The list includes standard Salesforce actions like 'New', 'Import', 'Change Owner', and 'Assign Label' at the top right. The bottom of the screen shows the Windows taskbar with various application icons.

Milestone 11 : Reports

Activity 1: Create Report

1. Go to the app → click on the reports tab
2. Click New Report.
3. select for report type, search for “rice mill with consumers” click on it. And click on start report.
4. Their outline pane is opened already, select the fields that are mentioned below in the column section.
 - 1.consumer name
 - 2.rice type
 - 3.rice price/kg
 - 4.mode of payments
 - 5.amount paid
5. Remove the unnecessary fields.
6. Select the fields that are mentioned below in the GROUP ROWS section.
7. Rice taken by shops.
8. Click save and run and save the report as “range of amount per day”.and save it.



Report: rice mills with consumers
range of amount per day

Total Records	Total rice price/kg	Total Amount Paid			
10	533	32,447.00			
Rice taken by shops					
	consumer: consumer Name	Rice type	rice price/kg		
		Mode of payment	Amount Paid		
2 (2)	consumers-001	1.basmati	20	Cash	40.00
	consumers-002	2.normal rice	50	UPI	100.00
Subtotal			70		140.00
3 (1)	consumers-003	2.normal rice	3	Debit card	9.00
Subtotal			3		9.00
40 (1)	consumers-005	1.basmati	40	UPI	1,600.00
Subtotal			40		1,600.00
50 (1)	consumers-006	2.normal rice	50	Credit card	2,500.00
Subtotal			50		2,500.00
53 (1)	consumers-009	2.normal rice	53	Debit card	2,809.00
Subtotal			53		2,809.00
70 (1)	consumers-004	2.normal rice	70	Debit card	4,900.00
Subtotal			70		4,900.00
75 (1)	consumers-008	1.basmati	75	Cash	5,625.00

Row Counts Detail Rows Subtotals Grand Total

26°C Mostly clear Search ENG IN 10:03 PM 29-06-2024

Report URL: https://gitamuniversitybangalore70-dev-ed.develop.lightning.force.com/lightning/r/Report/000dM000003jUxtUAE/view?true&filterValues=%7B%7D#

Save As
Save
Subscribe
Export
Delete
Add to Dashboard

Activity 2: Sharing report to owner

1. Click edit drop down and select subscribe option
2. Follow as per below image.
3. After selecting the run report as a “another person” select your personal account or whom you want to send that mail to.
4. Click save.

Activity 3: create a report folder

1. Click on the app launcher and search for reports.
2. Double click on the report, “reports tab” will be auto populated in the navigation bar.
3. Click on the report tab, click on the new folder.
4. Give the Folder label as “estimated rice per day”, Folder unique name will be auto populated.
5. Click save.

- 1.navigate to app launcher and click reports on that.
- 2.click all reports.
3. Select the range of amount per day drop down in that click move.
4. Select estimated rice per day folder and select folder.

The screenshot displays two instances of the Salesforce Reports interface side-by-side, illustrating the steps described in the list above.

Top View (Left):

- Left Sidebar:** Shows categories: REPORTS, FOLDERS, and FAVORITES.
- Report List:**

Report Name	Description	Folder	Created By	Created On	Subscribed
Erin's SB Opp Matrix for Sales		Acquisition Reports	udayrushi.yelagandula	5/6/2023, 2:09 pm	
Lincoln's SolarBot Research to remove		Acquisition Reports	udayrushi.yelagandula	5/6/2023, 2:09 pm	
Marketing's SB Lead Report for Sales		Acquisition Reports	udayrushi.yelagandula	5/6/2023, 2:09 pm	
Potential SB Product Names for R&D		Acquisition Reports	udayrushi.yelagandula	5/6/2023, 2:09 pm	
range of amount per day	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Private Reports	udayrushi.yelagandula	10/7/2023, 2:41 pm	
- Right Panel:** A context menu is open over the last row, listing options: Run, Edit, Subscribe, Export, Delete, Add to Dashboard, Favorite, and Move.

Bottom View (Right):

- Left Sidebar:** Shows categories: REPORTS, FOLDERS, and FAVORITES.
- Report List:**

Report Name	Description	Folder	Created By	Created On	Subscribed
range of amount per day		estimated rice per day	A.Bhargav	28/6/2024, 11:31 pm	✓
- Right Panel:** A context menu is open over the last row, listing options: Run, Edit, Subscribe, Export, Delete, Add to Dashboard, Favorite, and Move.

Common UI Elements: Both views include a top navigation bar with a search bar, 'New Report' and 'New Folder' buttons, and a system header showing the URL as `gitamuniversitybangalore70-dev-ed.develop.lightning.force.com/lightning/o/Report/home`. The bottom of the screen shows a Windows taskbar with various icons and system status.

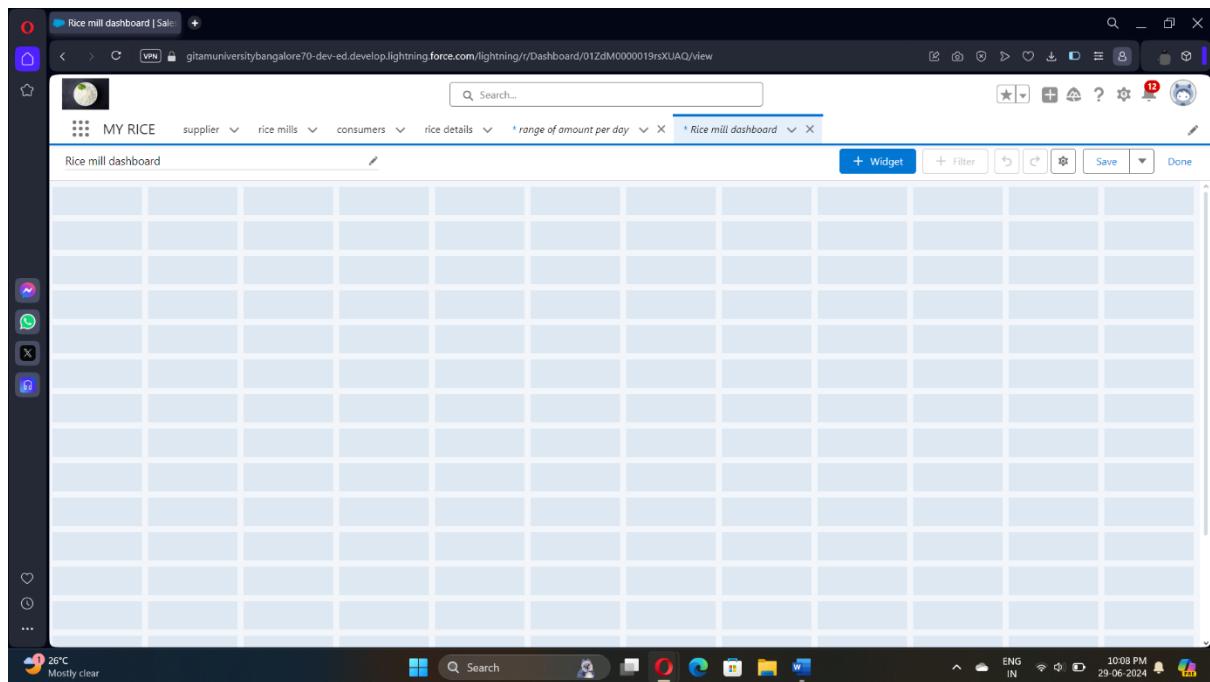
Milestone 12 : Dashboards

Activity 1: Create Dashboard Folder

1. Click on the app launcher and search for the dashboard.
2. Click on the dashboard tab.
3. Click the new folder, give the folder label as “ amount data dashboard”.
4. Folder unique names will be auto populated.
5. Click save.

Activity 2: Create Dashboard

1. Go to the app → click on the Dashboards tabs.
2. Give a Name and select the folder that was created, and click on create.
3. Select add Widget.
4. Select a Report and click on select.



The image shows two screenshots of a Salesforce Lightning interface. The top screenshot displays a blank dashboard grid with a floating action bar at the top right containing options like '+ Widget', '+ Filter', and 'Save'. The bottom screenshot shows a 'Select Report' dialog box overlaid on the dashboard. The dialog has a sidebar on the left with sections for 'Reports' (Recent, Created by Me, Private Reports, Public Reports, All Reports) and 'Folders' (Created by Me, Shared with Me). The main area shows a search bar and a list of reports, with one item highlighted: 'range of amount per day' created by 'A Bhargav' on '28-Jun-2024, 11:38 pm'. At the bottom right of the dialog are 'Cancel' and 'Select' buttons.

Display as- vertical bar chart

X-axis - rice taken by shops

Y-axis- sum of amount

Y-axis range - automatic

Sort by - rice taken by shops

Component theme - dark.

Add the component

Again select add component with above same steps

1.display as donut chart

2.sort by - sum of amount

3.title-range of amount per day

4.component theme dark

