"Salesforce-supported Virtual Internship Program (VIP)"

"Project Ready Program"

(Smartinternz)

GrainPro-A CRM APPLICATION FOR WHOLESALE RICE MILL

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GrainPro-CRM APPLICATION FOR WHOLESALE RICE MILL

1. Project Overview (ABSTRACT)

The Rice Mill CRM Application is a tailored Salesforce-based solution developed to streamline operations within a rice mill factory. This application automates and optimizes the daily management of rice production, sales tracking, and customer engagement, addressing the unique requirements of a wholesale rice mill. By leveraging Customer Relationship Management (CRM) functionalities, the system provides a centralized platform for monitoring production volumes, recording sales, and managing inventory.

Key features include daily tracking of rice production by type, automated sales reporting, real-time inventory management, and daily report delivery to factory owners for strategic decision-making. The application integrates seamlessly with existing workflows, offering user-friendly interfaces and customizable reports to enhance operational visibility and efficiency. With role-based access, the system ensures secure handling of sensitive data, while predictive insights support proactive planning in response to market demands.

The Rice Mill CRM Application aims to empower rice mill factory owners and managers by delivering actionable insights and facilitating efficient, data-driven operations.

INDEX PAGE

Topics	Page No
1.Salesforce	
■ Creating Developer Account	5
■ Account Activation	5
2.Object Creation	
■ Create Supplier Object	6
■ Create Rice Mill Object	7
■ Create Consumer Object	8
■ Create Rice Details Object	9
3.Tabs	
■ Creating a Custom Tab	10 - 11
4.The Lightning App	
■ Create a Lightning App	12 - 13
5.Fields & Relationship	
■ Creating the number field in rice details object	14
■ Creating Junction Object	15 - 16
■ Creating a Master-Detail Relationship	17
■Creating the Roll-up Summary	18 - 19
■ Creating Fields in rice mill Object	20 - 22
■ Creating Fields in consumer Objects	23 - 26
■Creating Cross Object Formula Field in consumer Object	26 - 27
■ Creating the validation rule	28 - 30

INDEX PAGE

Topics	Page No
6.Page Layouts	
■ creating the page layout	31
7.Profiles	
■ Owner Profile	32
■ Employer Profile	33
■ Worker Profile	34
8.Role & Hierarchy	
■ Creating Owner & Employee Role	35
9.Users	
■ Create User	36 - 38
10. Permission Sets	
■ Creating OWD Setting	39
11.Report & Dashboards	
■ Create Report &Sharing Report To Owner	40 - 41
■ Create a Report Folder	41
■ Create Dashboard	42 - 43
12.Apex	
■ Creating an Apex Class(Consumer Record)	44
■ Creating An Apex Trigger	45
13.Conclusion	46

INTRODUCTION

TASK-1

Creating Salesforce Developer Org and Account Activation

Creating Salesforce Developer Org

1. **Visit Salesforce Developer Site:**
    - Go to the Salesforce Developer website.
    - Click on "Sign Up" or "Sin Up for Free".
2. **Fill Out the Registration Form:**
    - Enter your details such as name, company, email, role, and country.
    - Choose a unique username (it must be in the form of an email address, but does not have to be a real email).
3. **Activate the Account:**
    - Salesforce will send a confirmation email to the provided email address.
    - Open the email and click on the confirmation link to activate your account.
4. **Set Up Your Password:**
    - After clicking the confirmation link, you will be prompted to set up a password and a security question.
    - Complete the setup and click "Save".
5. **Login to Developer Org:**
    - Go back to the Salesforce Developer website and log in using your username and password.

Account Activation

1. **Login to Salesforce:**
    - Use your credentials to log in to the Salesforce Developer Org.

TASK-2

Object Creation -Create Supplier Object

To create a Supplier object in Salesforce, follow these steps:

Navigate to Setup Page:

- Click on the gear icon.
- Click on Setup.

CreateaCustomObject:

- From the setup page, click on ObjectManager.
- Click on Create.
- Click on CustomObject.

DefinetheCustomObject:

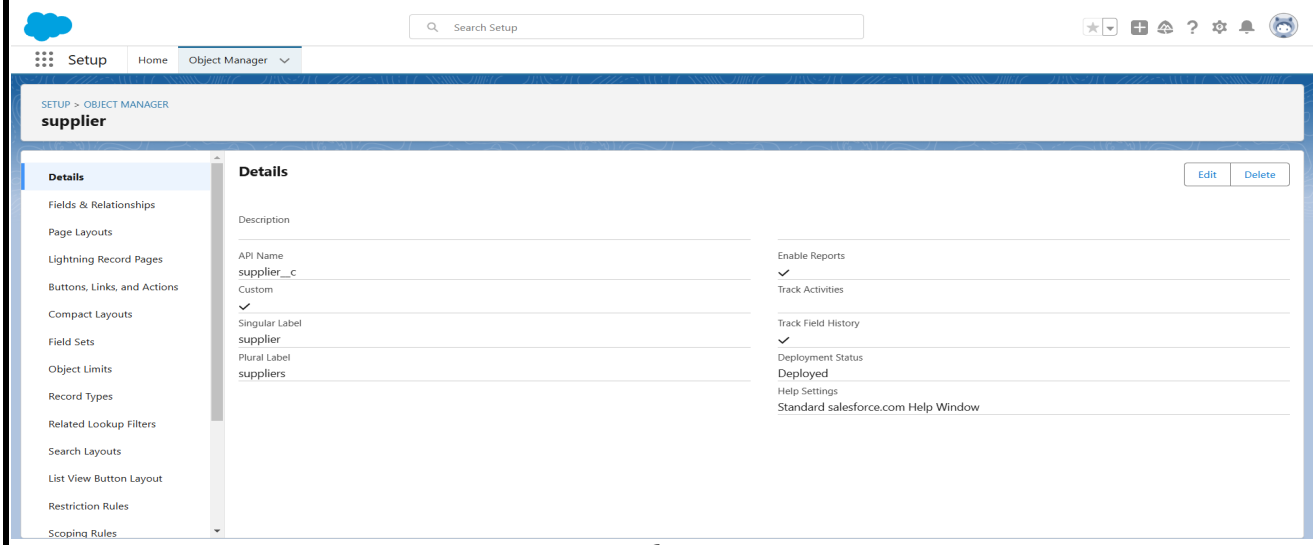
- Enter the LabelName: **Supplier.**
- Enter the PluralLabelName: **Suppliers.**
- Enter the **RecordNameLabelandFormat:**
- RecordName: **Supplier Name**
- DataType**: Text**

SetAdditionalOptions:

- Click on AllowReports.
- Click on TrackFieldHistory.
- Click on AllowSearch.

SavetheCustomObject:

- Click on Save



TASK-2

Object Creation -Create Rice Mill Object

To create a Supplier object in Salesforce, follow these steps:

Navigate to Setup Page:

- Click on the gear icon.
- Click on Setup.

CreateaCustomObject:

- From the setup page, click on ObjectManager.
- Click on Create.
- Click on CustomObject.

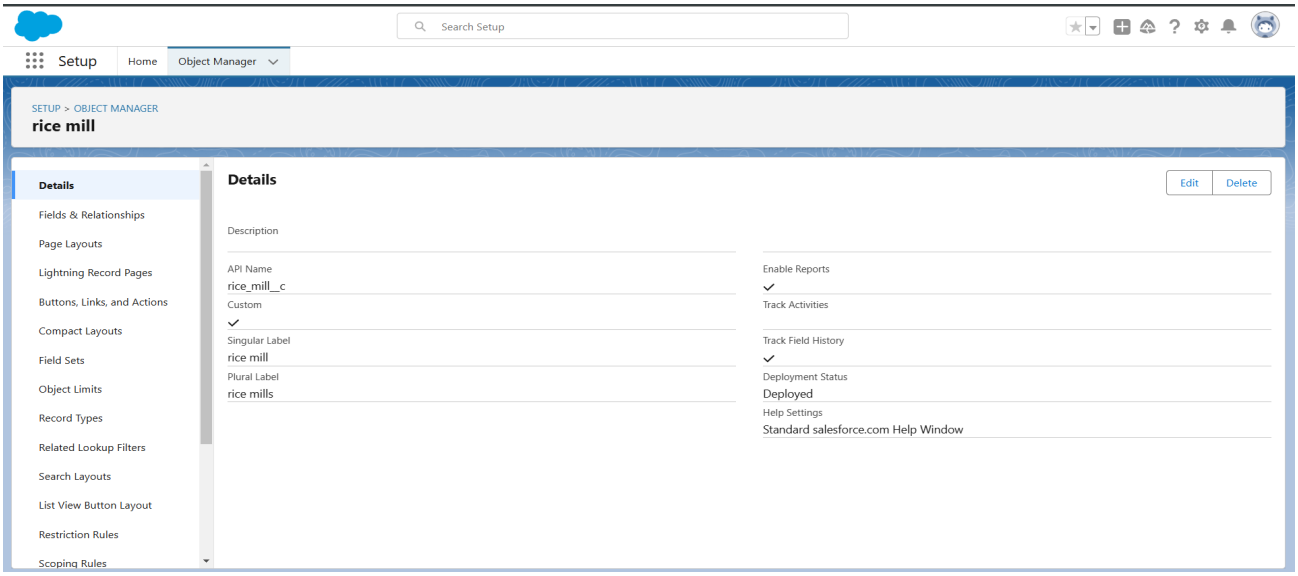
DefinetheCustomObject:

- Enter the LabelName: **Rice Mill.**
- Enter the PluralLabelName: **Rice Mill.**
- Enter the **RecordNameLabelandFormat:**
- RecordName: blank
- DataType**: Auto Number**
- Display Format: **rice-{000}**
- Sterting Number: **1**

SetAdditionalOptions:

- Click on AllowReports.
- Click on TrackFieldHistory.
- Click on AllowSearch.

Click on Save



TASK-2

Object Creation -Create Consumer Object

To create a Supplier object in Salesforce, follow these steps:

Navigate to Setup Page:

- Click on the gear icon.
- Click on Setup.

CreateaCustomObject:

- From the setup page, click on ObjectManager.
- Click on Create.
- Click on CustomObject.

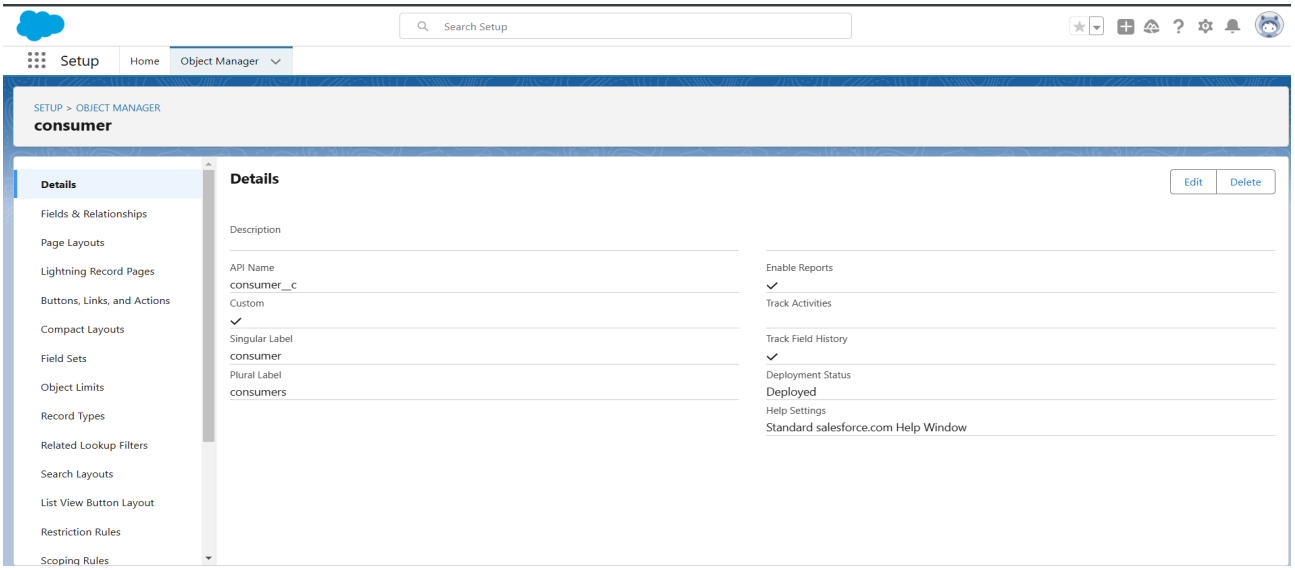
DefinetheCustomObject:

- Enter the LabelName: **Consumer.**
- Enter the PluralLabelName: **Consumers.**
- Enter the **RecordNameLabelandFormat:**
- RecordName: blank
- DataType**: Auto Number**
- Display Format: **Consumers-{000}**
- Sterting Number: **1**

SetAdditionalOptions:

- Click on AllowReports.
- Click on TrackFieldHistory.
- Click on AllowSearch.

Click on Save



TASK-2

Object Creation -Create Rice Details Object

To create a Supplier object in Salesforce, follow these steps:

Navigate to Setup Page:

- Click on the gear icon.
- Click on Setup.

CreateaCustomObject:

- From the setup page, click on ObjectManager.
- Click on Create.
- Click on CustomObject.

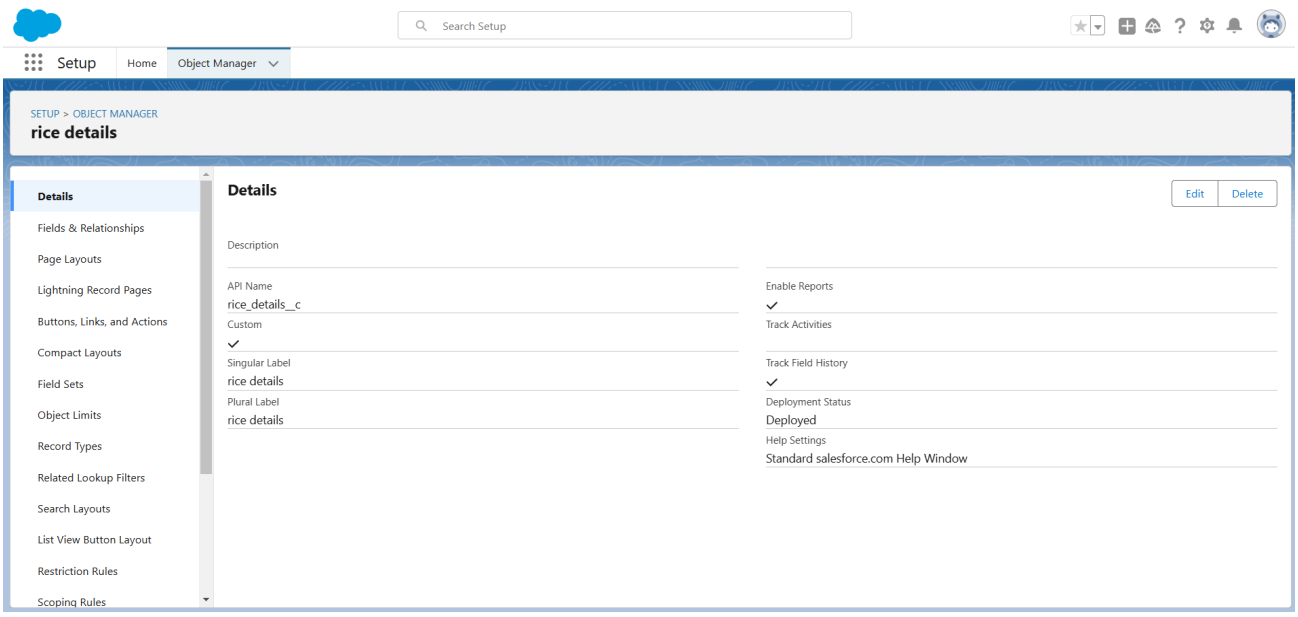
DefinetheCustomObject:

- Enter the LabelName: **Rice Details.**
- Enter the PluralLabelName: **Rice Detaails.**
- Enter the **RecordNameLabelandFormat:**
- RecordName: blank
- DataType**: Auto Number**
- Display Format: **rice-{000}**
- Sterting Number: **1**

SetAdditionalOptions:

- Click on AllowReports.
- Click on TrackFieldHistory.
- Click on AllowSearch.

Click on Save



TASK-3

Creating a Custom Tab (Supplier)

To create a Tab for the Supplier object, follow these steps:

Navigate to Setup Page:

- Go to the setup page.
- Type "Tabs" in the Quick Find bar.
- Click on Tabs.

Create a New Custom Object Tab:

- Click on **New** under the Custom Object Tabs section.

Select Object and Tab Style:

- Select the Supplier object.
- Choose the tab style.
- Click on Next.

Add to Profiles Page:

- Keep it as default.
- Click on Next.

Add to Custom App :

- Uncheck the Include Tab checkbox .

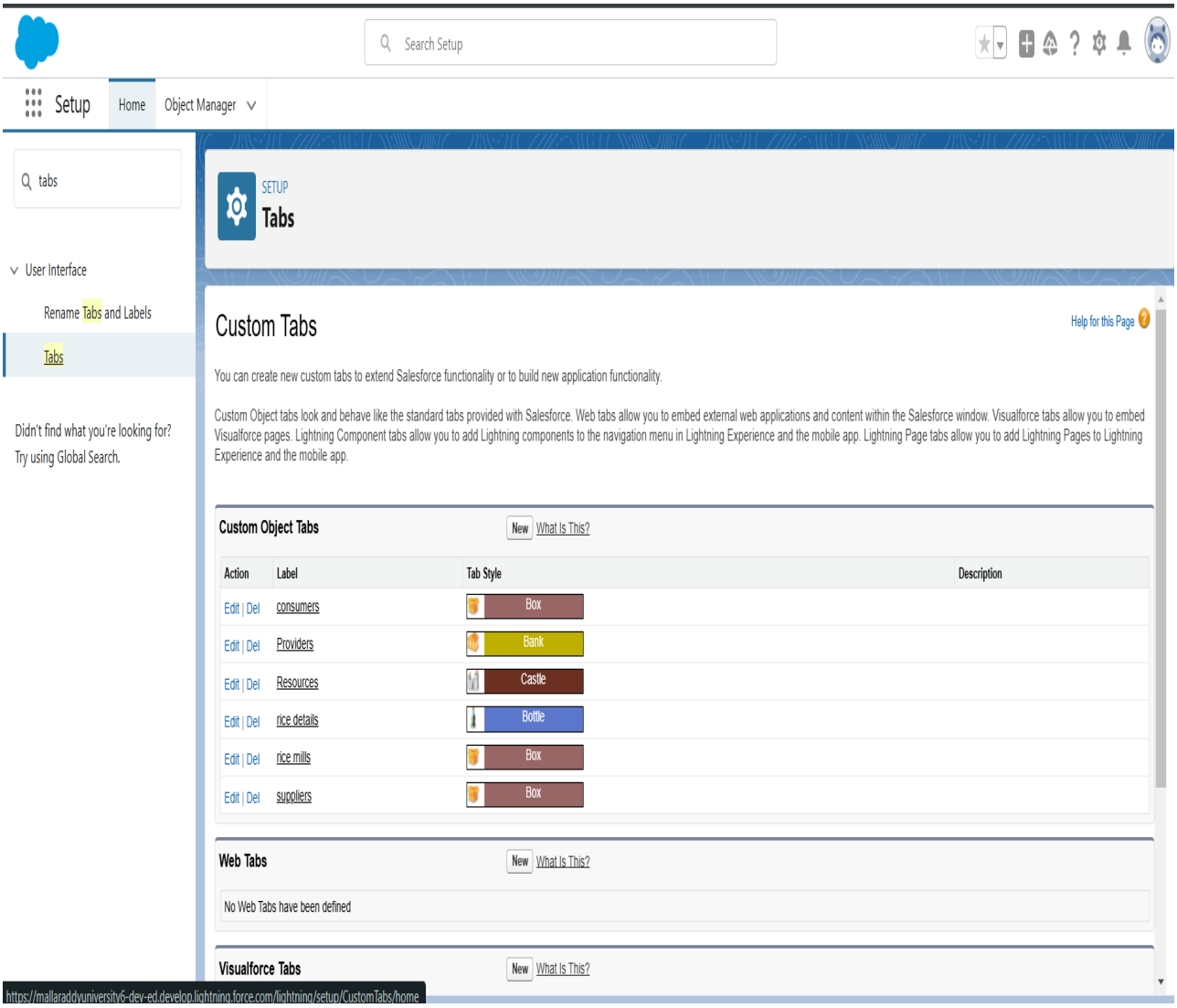
Append Tab to Users Existing Personal Customizations:

- Ensure that the Append tab to users 'existing personal customizations option is checked.

Save the Custom Tab:

click **save**

create tabs for the remaining objects (**RiceMill, Consumer, RiceDetails**), follow the same steps as mentioned above


Search Setup
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
Help for this Page
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.
Custom Object Tabs
New
What Is This?
Action
Label
Tab Style
Description
Edit | Del
consumers
Box
Edit | Del
Providers
Bank
Edit | Del
Resources
Castle
Edit | Del
rice details
Bottle
Edit | Del
rice mills
Box
Edit | Del
suppliers
Box
Web Tabs
New
What Is This?
No Web Tabs have been defined
Visualforce Tabs
New
What Is This?
https://mallaraddyuniversity6-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

TASK-4

Create a Lightning App(GrainPro)

- The Lightning App An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your organization can work more efficiently by easily switching between apps.

To create a Lightning app page, follow these steps:

Navigate to App Manager:

- Go to the setup page.
- Search for “App Manager” in the Quick Find bar.
- Select “App Manager”.
- Click on New Lightning App.

Fill in App Details:

- Enter the app name as Grain pro.
- Click Next.

App Options Page:

- Keep the settings as default.
- Click Next.

Utility Items Page:

- Keep the settings as default:
- Click Next.

Utility Items Page:

- Keep the settings as default.
- Click Next.

Upload a Photo:

- Upload a photo that is related to your app.

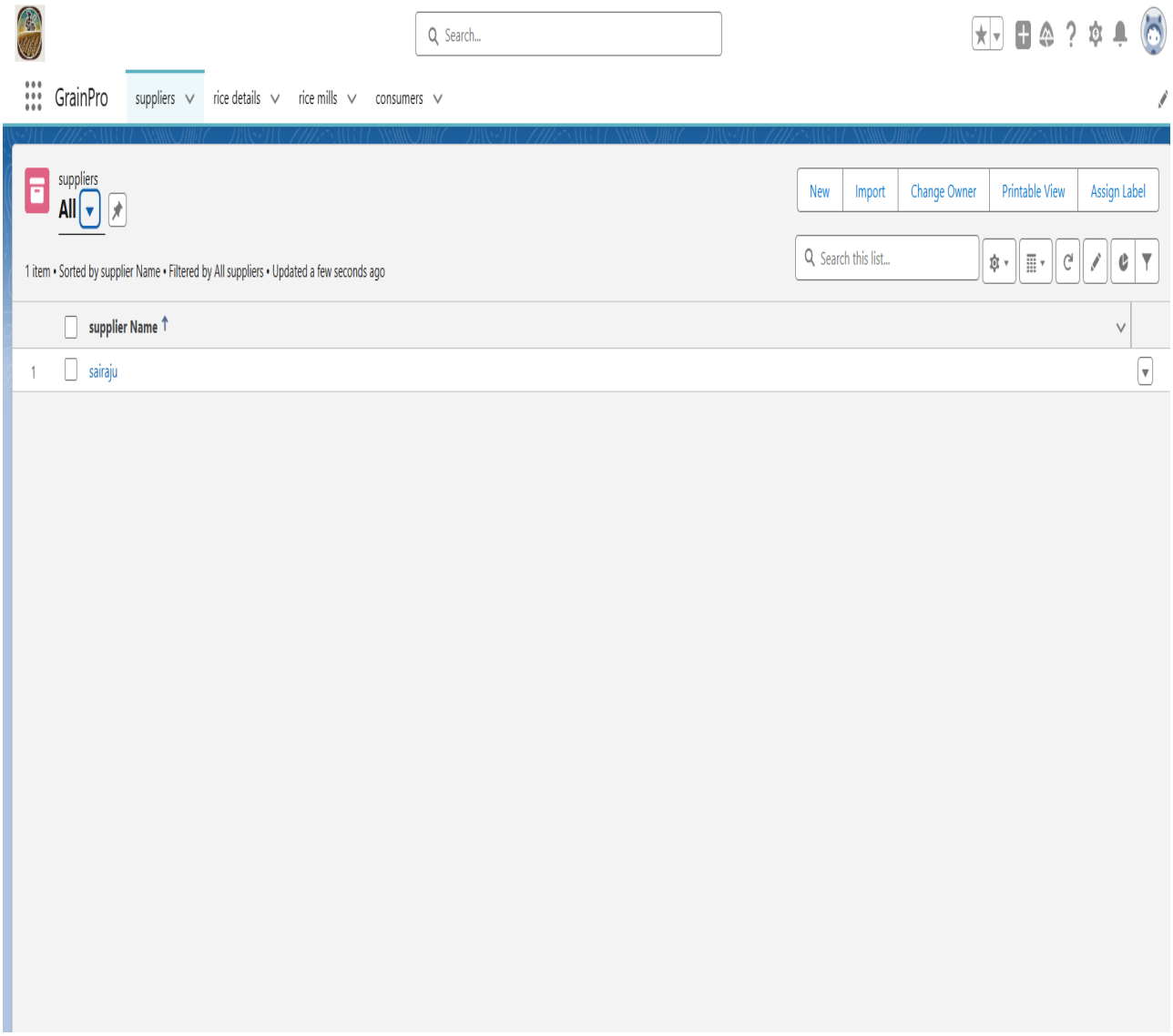
Add Navigation Items:

- Select the items (Supplier, Rice Mill, Consumer, Rice Details) from the search bar.
- Move the selected items using the arrow button.
- Click Next.

Add User Profiles:

- Search for profiles (System Administrator) in the search bar.
- Click on the arrow button to add the profile

click save and finesh



TASK-5

Creating the Number Field in Rice Details Object

To create a number field in the Rice Details object, follow these steps:

Navigate to Object Manager:

- Go to the setup page.
- Click on Object Manager .

Edit the Rice Details Object:

- From the dropdown, click Edit for the Rice Details object.

Create a New Field:

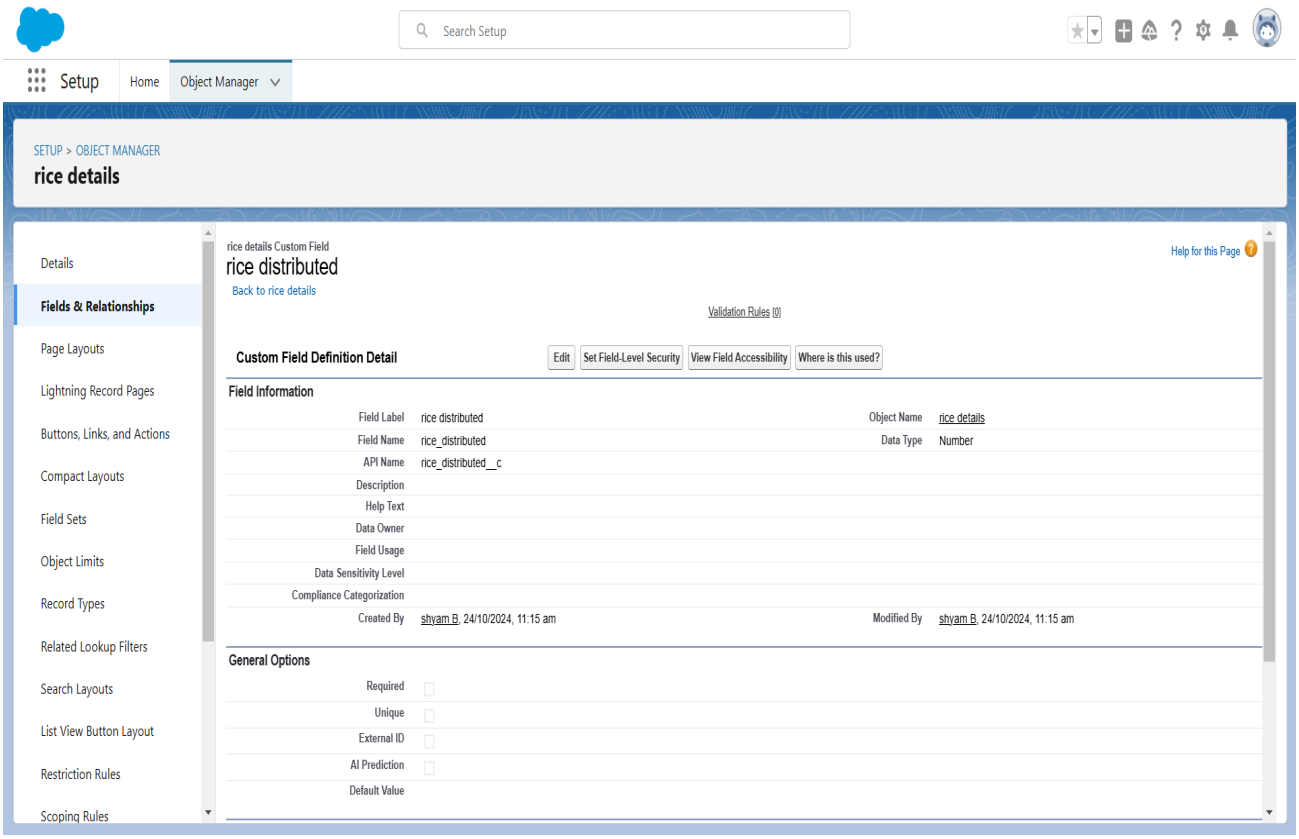
- Click on Fields & Relationships.
- Click on New

Select Data Type:

- Select Number as the data type.
- Click Next.

Define Field Properties:

- Enter the Field Label as Rice Distributed.
- Set the length to 5.



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: Rice Details with Supplier Rice Mill
To create a Junction Object:

Navigate to Object Manager:

- Go to the setup page.
- Click on Object Manager.
- From the dropdown, click Edit for the Rice Details object .

Create a New Field:

- Click on Fields & Relationships.
- Click on New.

Select Data Type:

- Select Master-Detail Relationship as the data type.
- Click Next.

Relate to Supplier Object:

- Select the related object Supplier.
- Click Next.

Define Field Properties:

- Give the Field Label as Supplier Name.
- Click Next.
- Click Next again.
- Click Save & New.

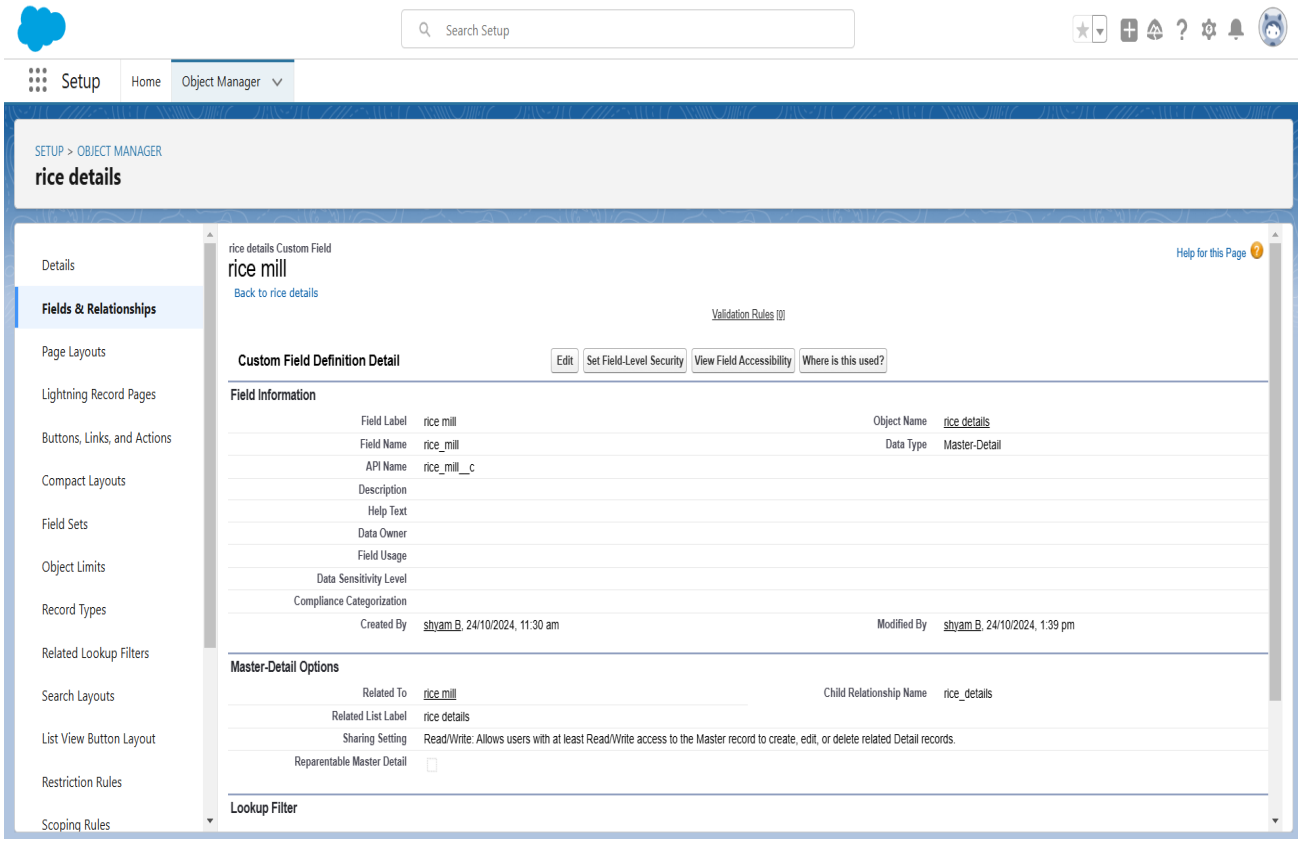
Repeat Steps for Rice Mill Object:

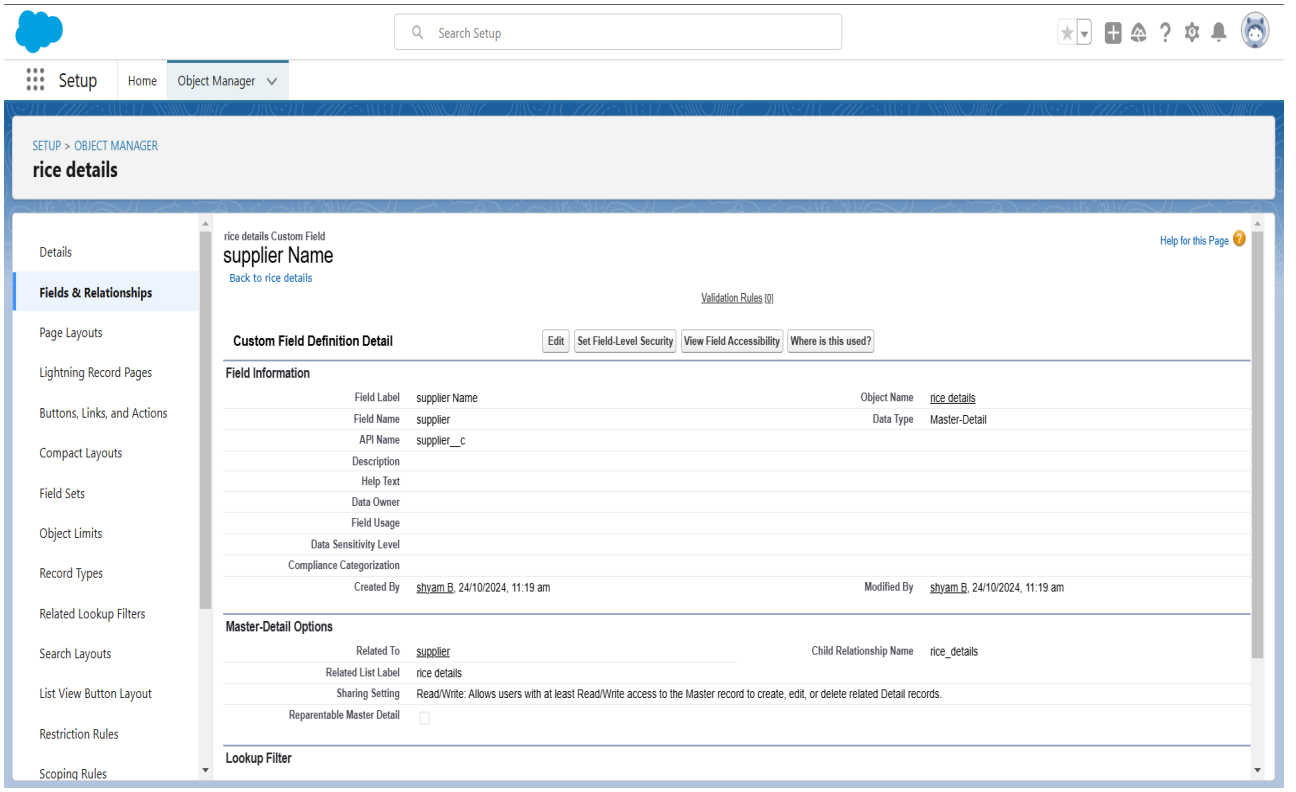
- Follow the same steps from 1 to 3.
- Select the related object Rice Mill.
- Click Next.

Define Field Properties for Rice Mill:

- Give the Field Label as RiceMill1(one).
- Click Next.

- Click Next again.
- Click Save.





Creating a Master-Detail Relationship

A master-detail relationship is a type of relationship between two objects where the master object controls certain behaviors and settings of the detail object. Here are a few use cases that demonstrate the use of master-detail relationships.

Creating Master-Detail Relationship between Consumer Rice Mill Object
To create a Master-Detail relationship :
Navigate to Object Manager:

- Go to the setup page.
- Click on Object Manager.
- From the dropdown, click Edit for the Consumer object.

Create a New Field:

- Click on Fields & Relationships.
- Click on New.

Select Data Type:

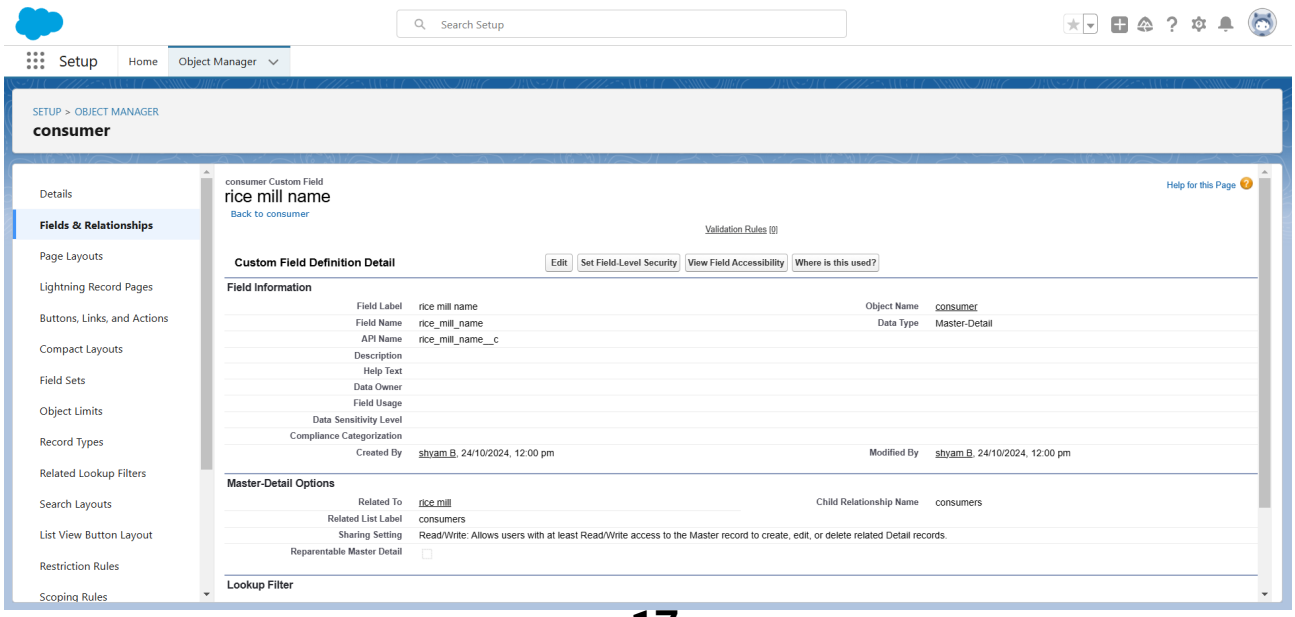
- Select Master-Detail Relationship as the data type.
- Click Next.

Relate to Rice Mill Object:

- Select the related object Rice Mill.
- Click Next.

Define Field Properties:

- Give the Field Label as Rice Mill Name.
- Click Next.
- Click Next again.
- Click Save



Creating the Roll-up Summary

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

Creating the Roll-up Summary Field on Supplier Rice Mill Objects To create a Roll-up Summary field:

Navigate to Object Manager:

- Go to the setup page.
- Click on Object Manager.
- Type the object name Supplier in the search bar.
- Click on the object.

Create a New Field:

- Click on Fields & Relationships.
- Click on New.

Select Data Type:

- Select the data type as Roll-up Summary.
- Click Next

define Field Properties for Supplier:

- Give the Field Label as Sum of Rice Distributed. The Field Name will be auto-generated.
- Click Next.

Configure Roll-up Summary for Supplier:

- Select the summarized object as Rice Details.
- Select the roll-up type as SUM.
- Select the field to aggregate as Rice Distributed.
- Click Next.
- Click Next again.
- Click Save

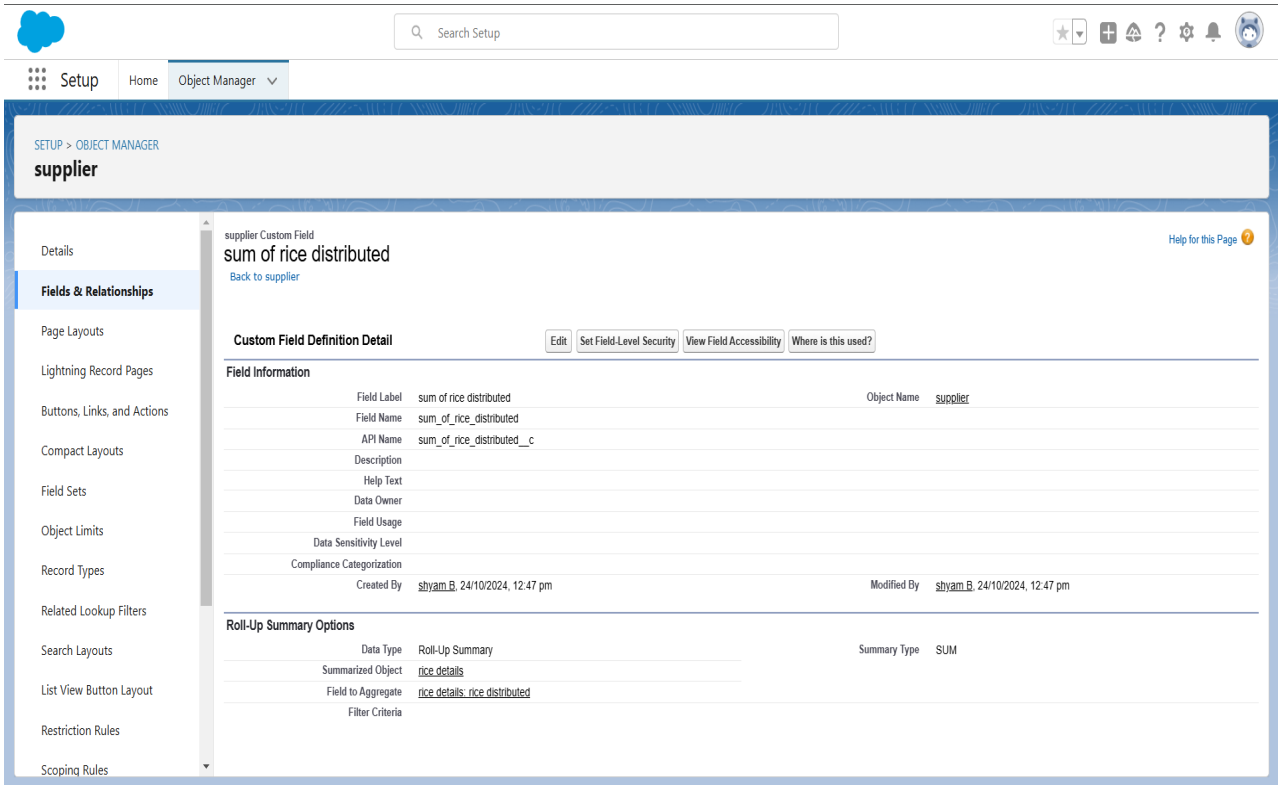
Repeat Steps for Rice Mill Object:

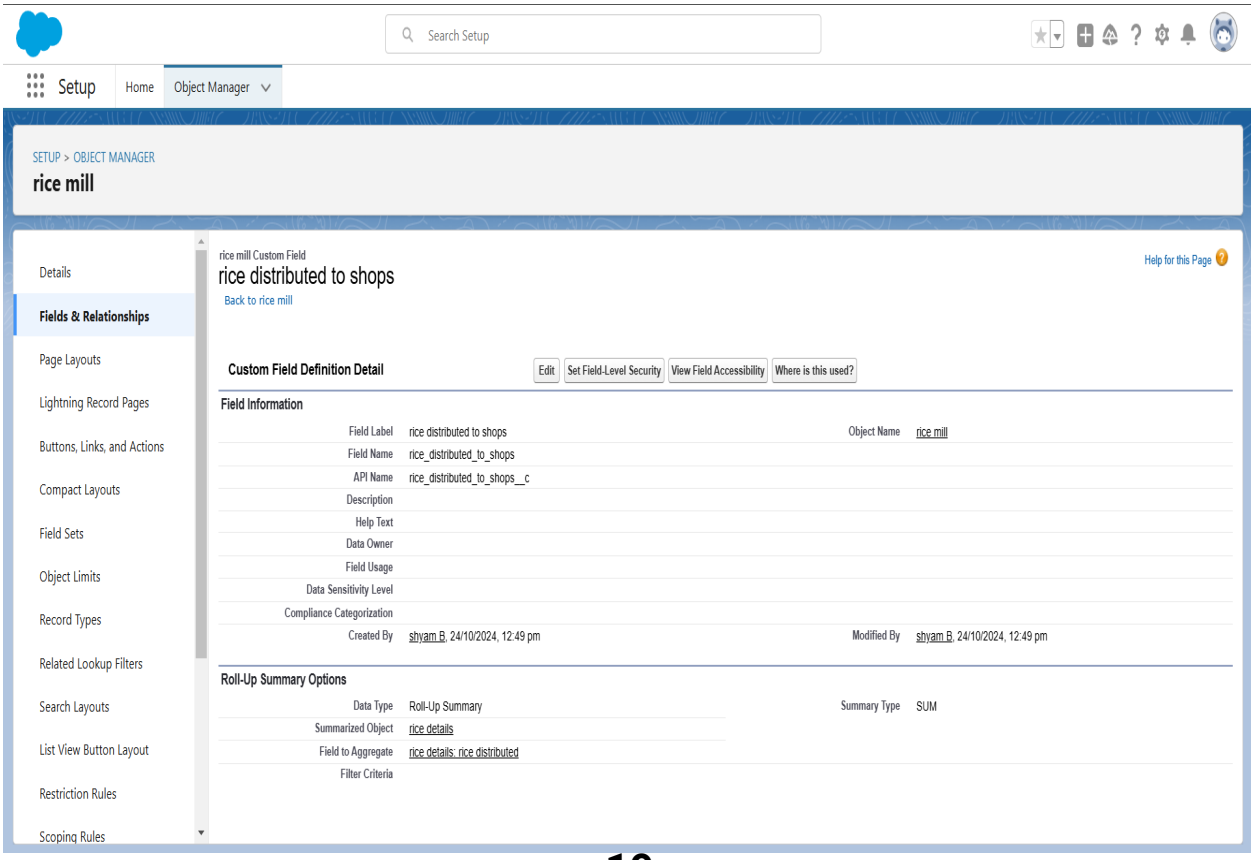
- Follow the same steps from 1 to 3 for the Rice Mill object.
- Give the Field Label as Rice Distributed to Shops. The Field Name will be auto-generated.
- Click Next.

Configure Roll-up Summary for Rice Mill:

- Select the summarized object as Rice Details.
- Select the roll-up type as SUM.
- Select the field to aggregate as Rice Distributed.
- Click Next.

- Click Next again.
- Click Save





Additional Steps for Consumer Object Create the Field:

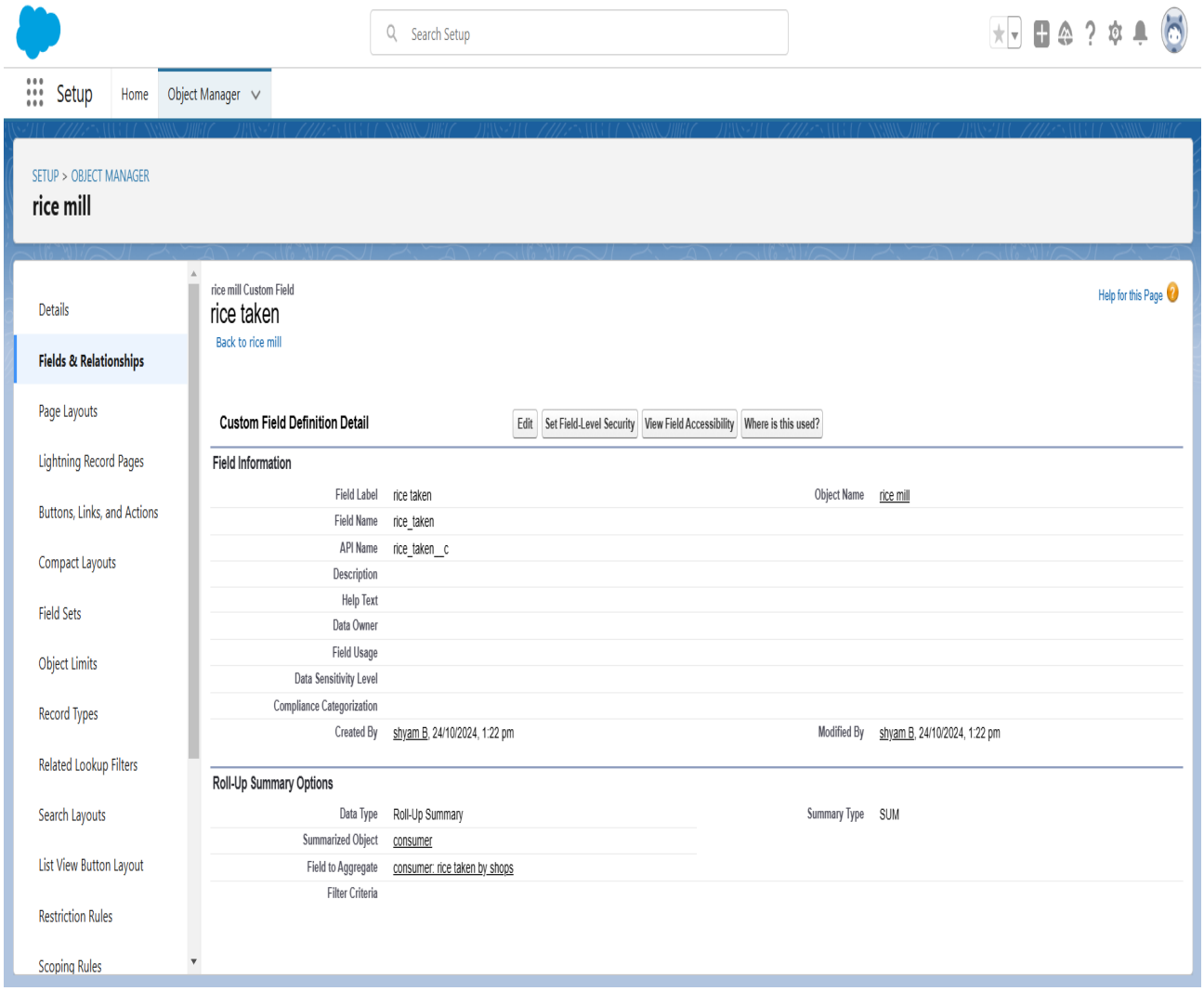
Create the field Rice Taken by Shops in Kgs using the number datatype in the Consumer object.

Repeat Steps for Rice Mill Object:

- Follow the same steps from 1 to 3 for the Rice Mill object.
- Give the Field Label as Rice Taken. The Field Name will be auto-generated.
- Click Next.

Configure Roll-up Summary for Rice Mill(Consumer):

- Select the summarized object as **Consumer**.
- Select the roll-up type as **SUM.**
- Select the field to aggregate as **Rice Taken in Shops**
- Click **Next**.
- Click **Next** again.
- Click **Save**.



Creating Fields in Objects Creating the number field in the Rice Details object.

Navigate to Setup:

- Go to the setup page.
- Click on "Object Manager" from the top navigation menu.

Edit Rice Details Object:

- In Object Manager, find and select "Rice Details" from the list of objects.
- Click on "Fields& Relationships."

Create New Field:

- Click on the "New" button to create a new field.

Select Data Type:

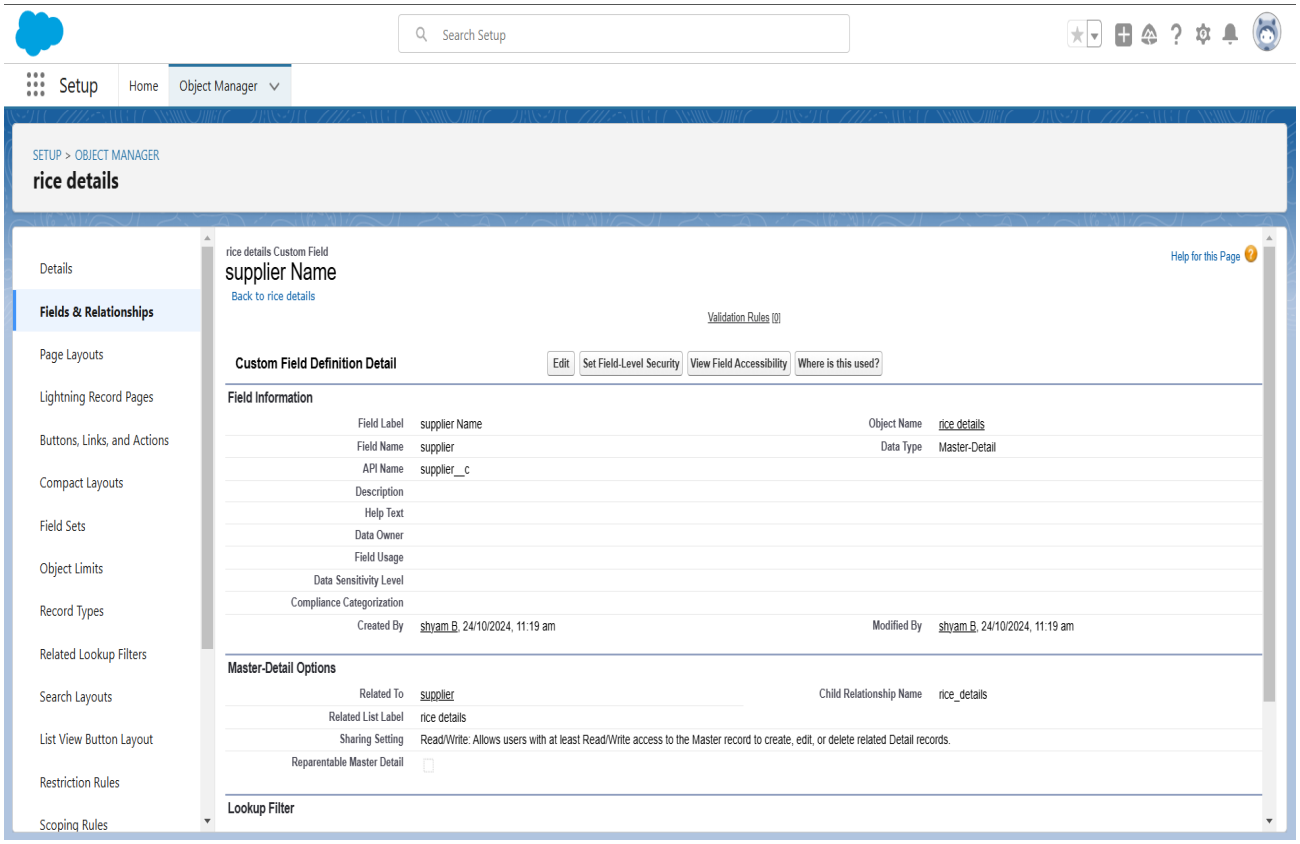
- Choose "Number" as the data type for the field.
- Click "Next."

Define Field Properties:

- Enter "Supplier Name" as the Field Label.
- Set the length to "5" (assuming this refers to the precision or size of the number).
- Field Name will be automatically populated based on the label.

Proceed with Creation:

- Click "Next" to proceed through any additional screens.
- Review the field details and click "Save" to create the new field.



Creating Fields in Rice Mill Objects

Navigate to Setup:

- Go to the setup page.
- Click on "Object Manager" from the top navigation menu.

Edit Rice Mills Object:

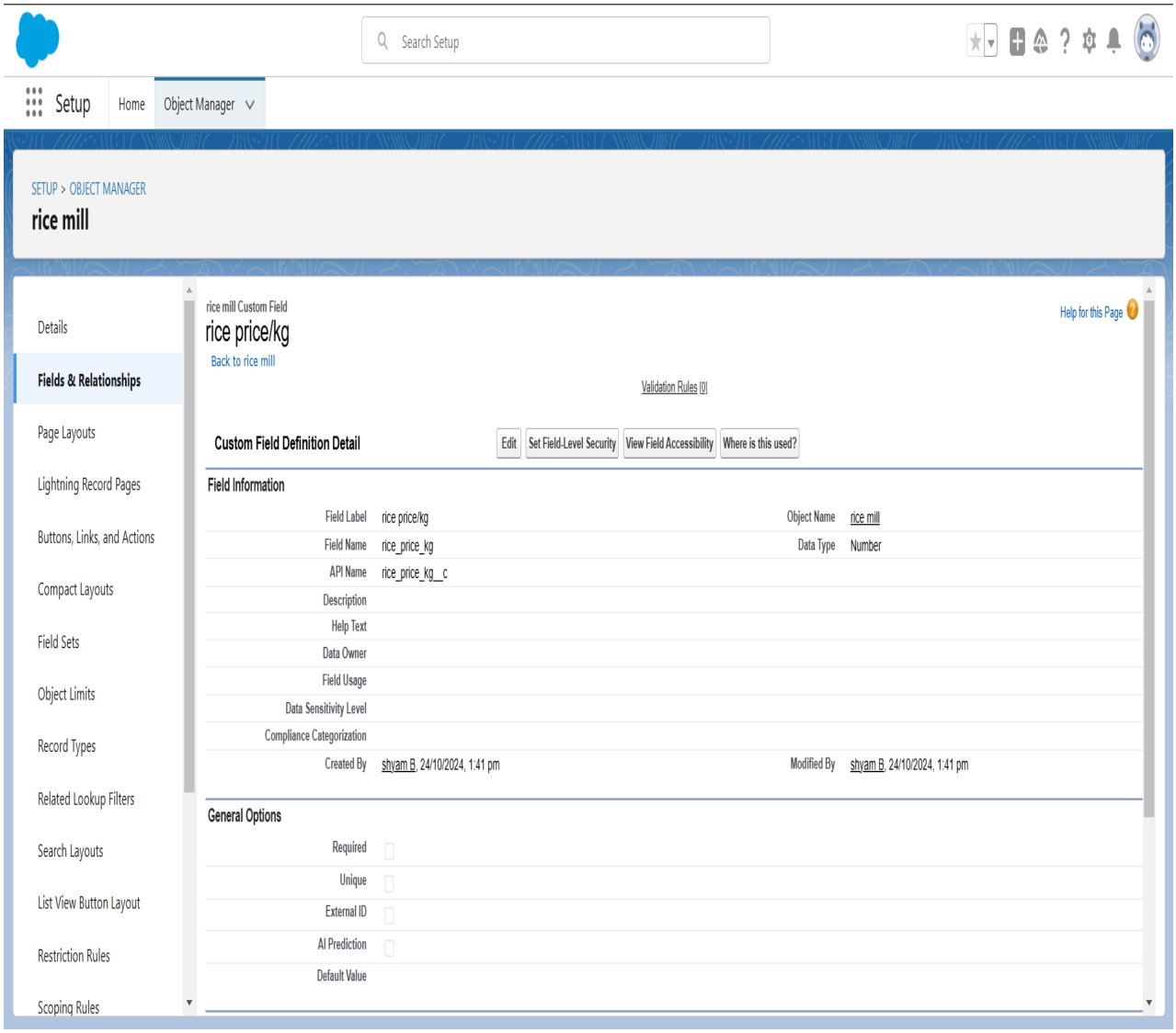
- In Object Manager, find and select "Rice Mills" from the list of objects.
- Click on "**Fields& Relationships**"

Create New Field:

- Click on the "**New**" button to create a new field.

Select Data Type:

- Choose "**Number**" as the data type for the field.
- Click "**Next**."
- Given the Field Label as Rice Price/kg" and length as **5**



Creating Fields in Consumer Objects

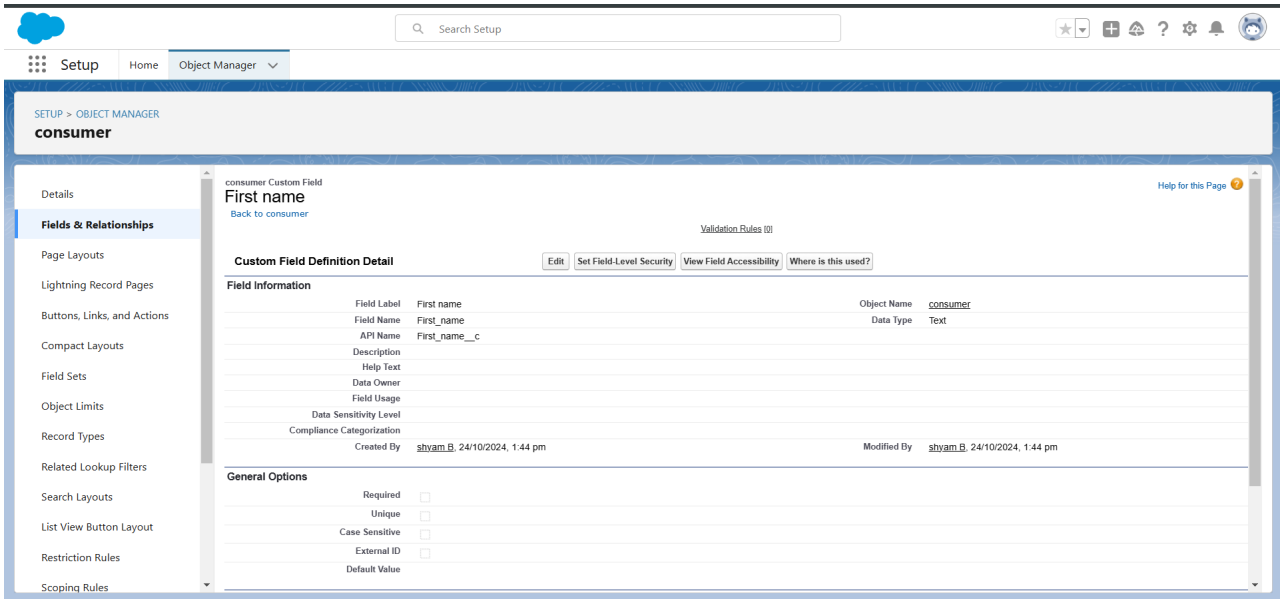
Navigate to Setup:

- Go to the setup page.
- Click on "Object Manager" from the top navigation menu.

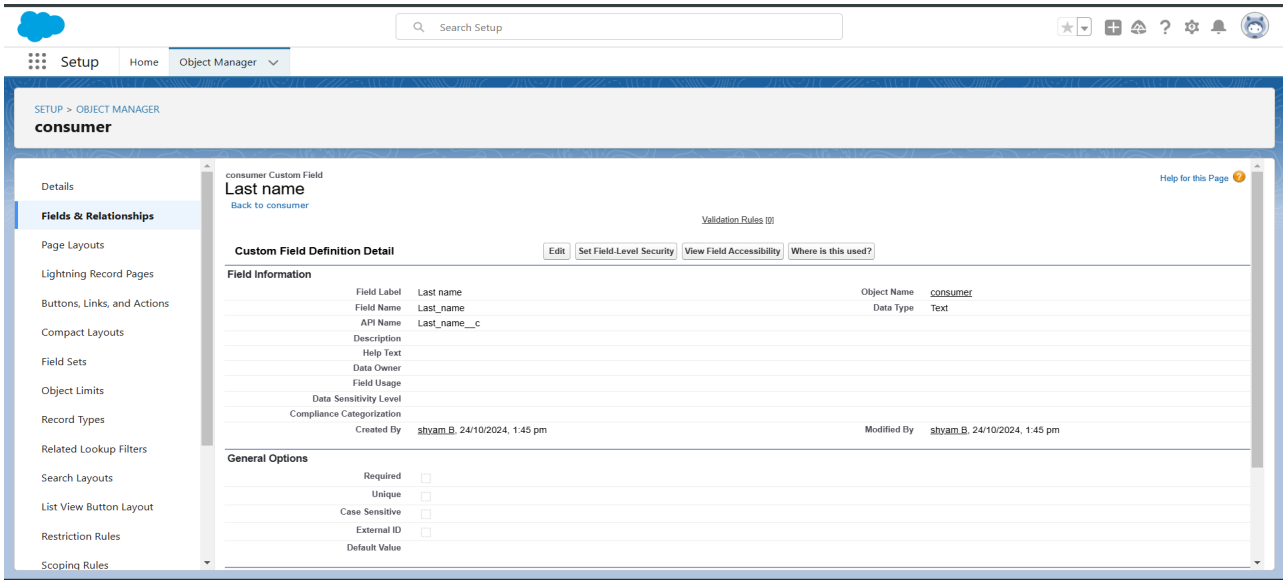
Edit Consumer Object:

- In Object Manager, find and select "Consumer" from the list of objects.
- Click on "Fields & Relationships.

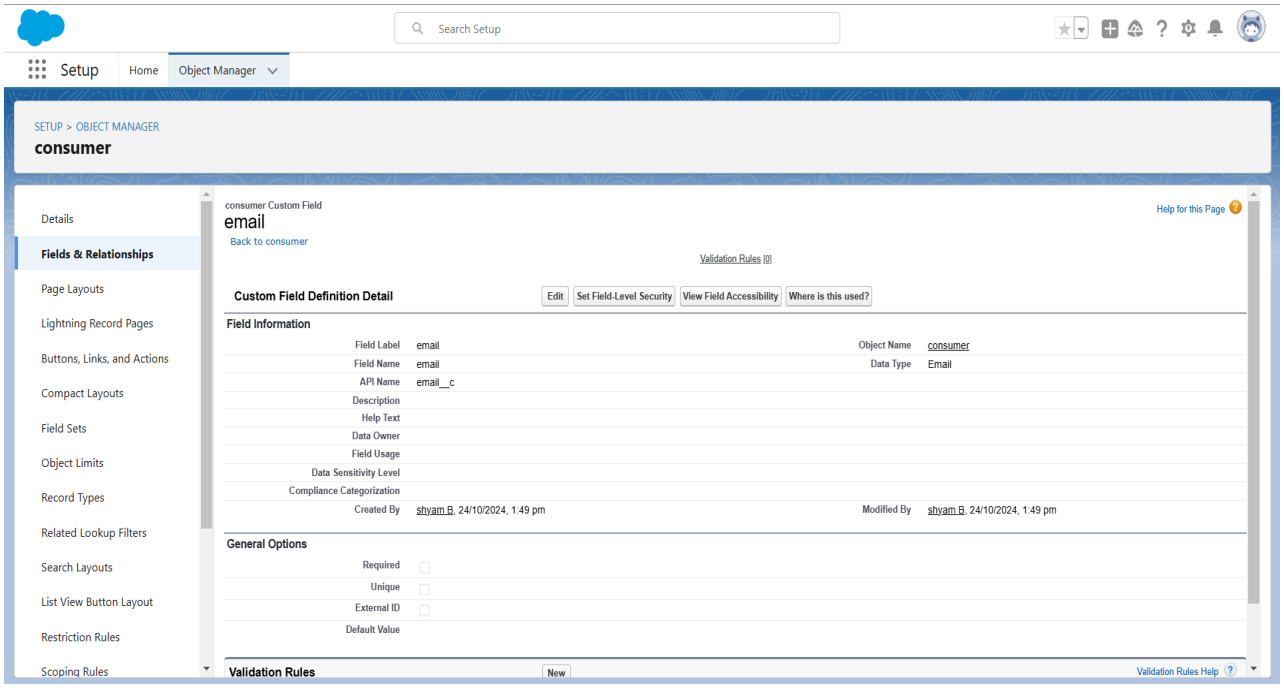
Create New Field For First Name:



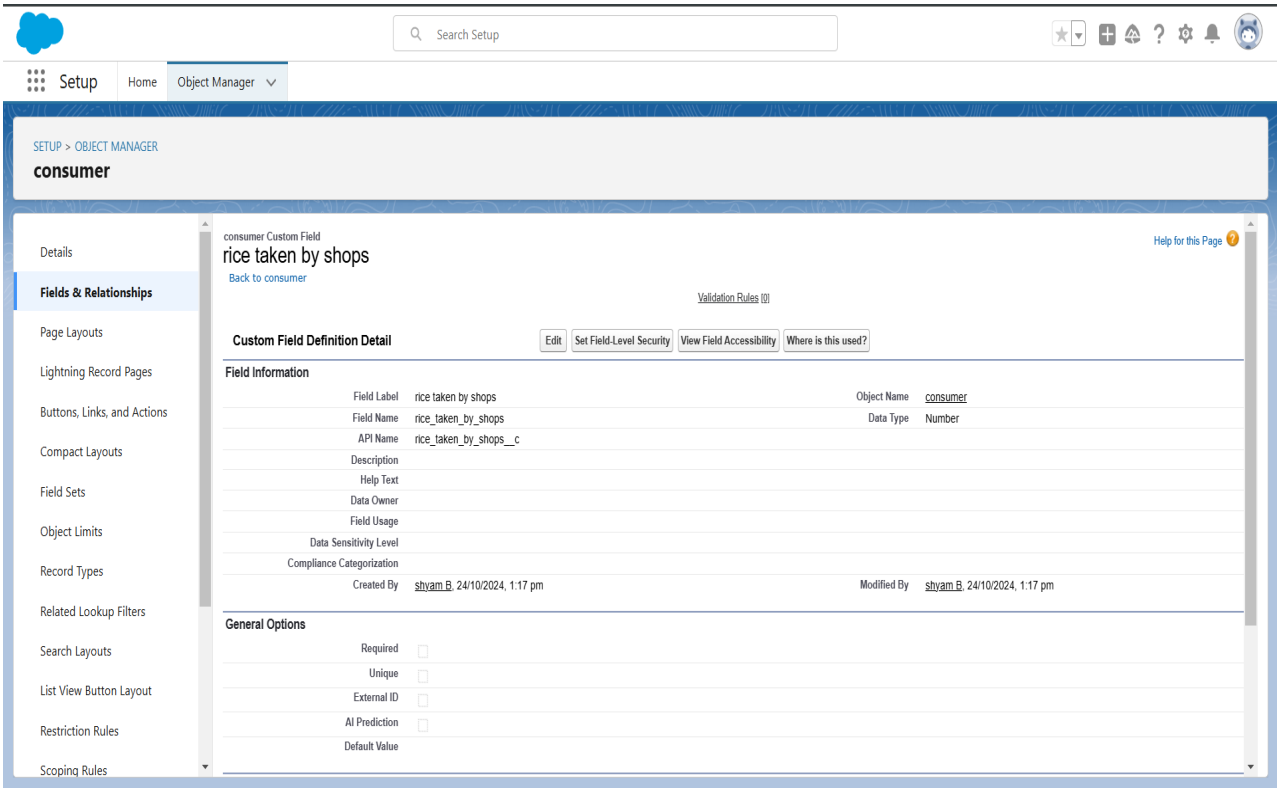
Create New Field For Last Name:



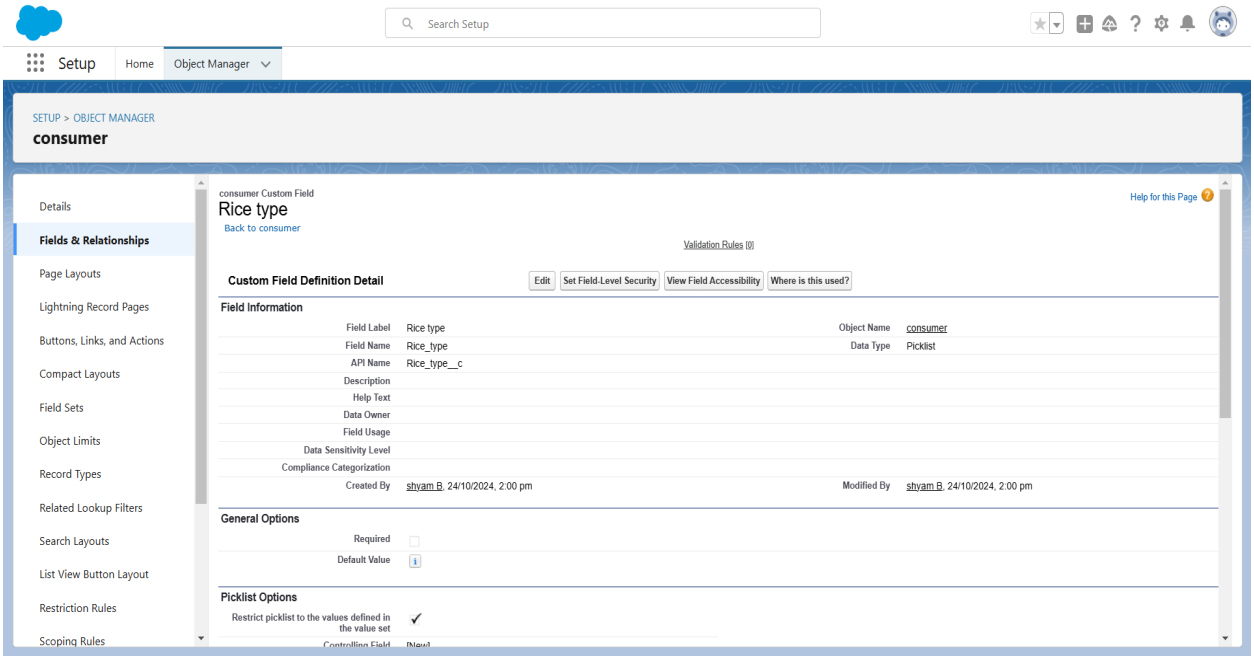
Create New Field For Email:



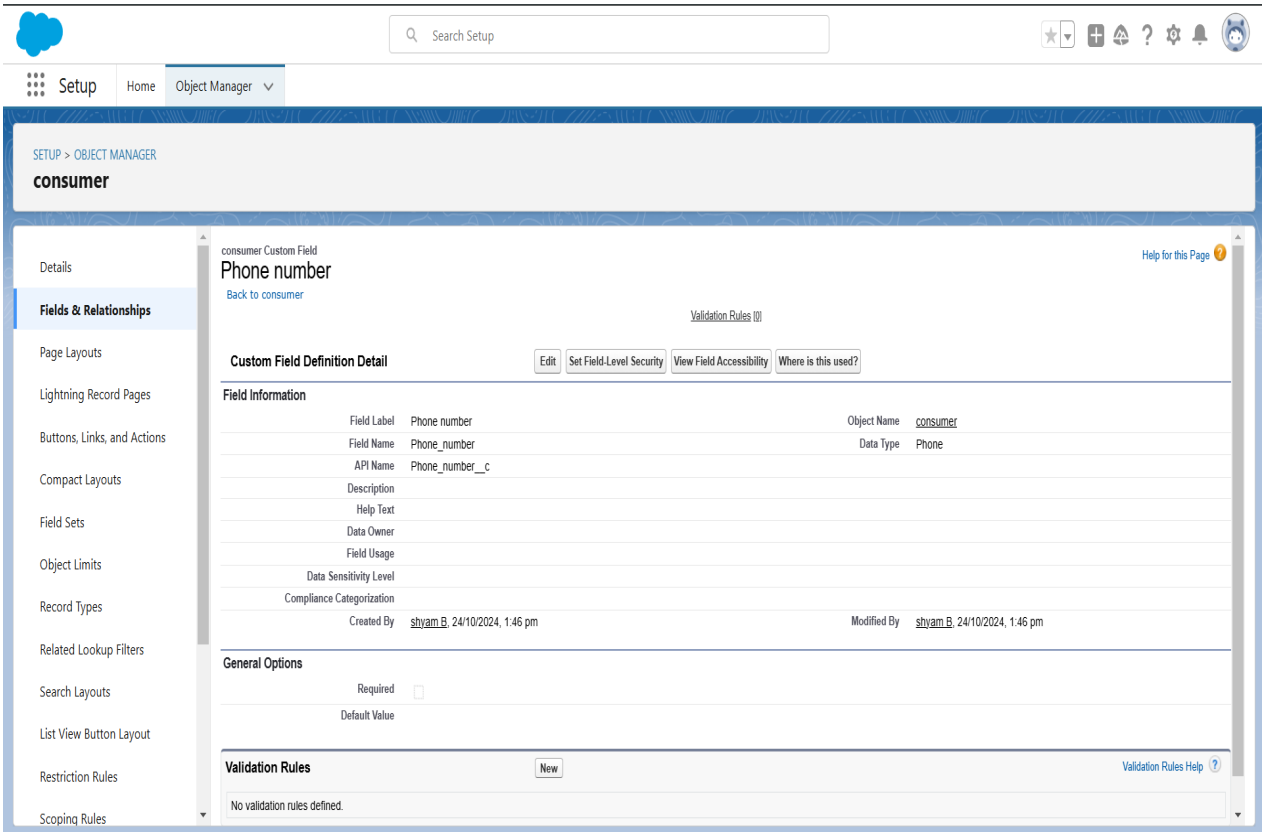
Create New Field For Rice taken by shops:



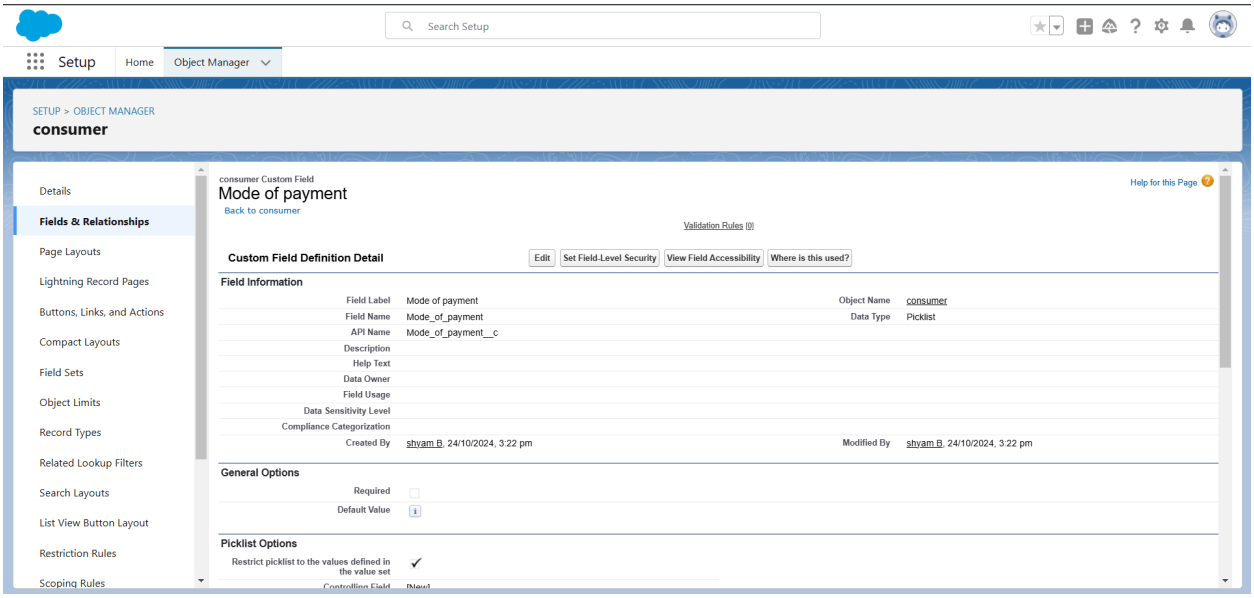
Create New Field For Rice Type:



Create New Field For Phone number:



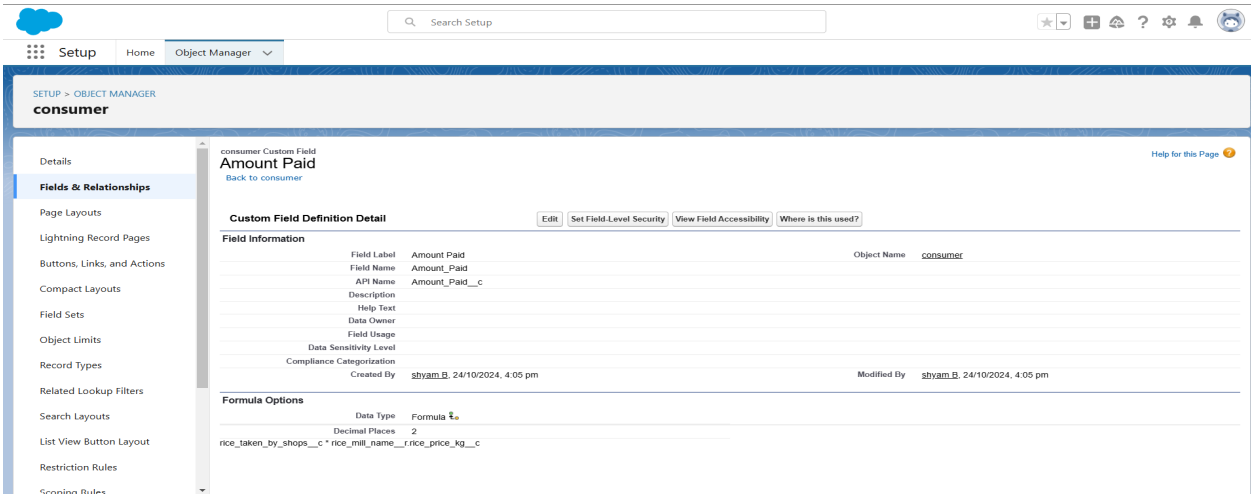
Create New Field For Mode of Payment:



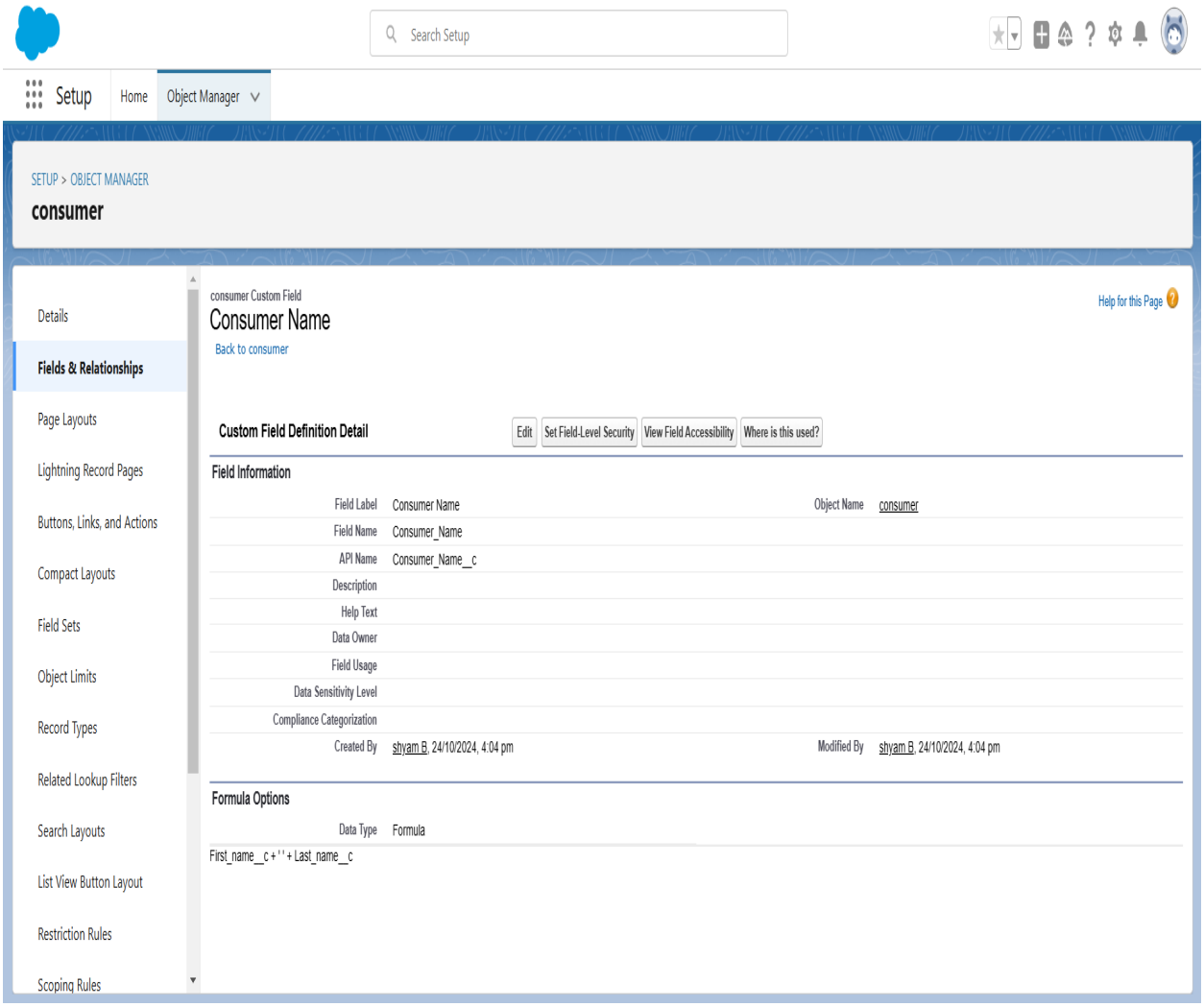
Creating Cross Object Formula Field in Consumer Object

A cross-object formula field is a formula field that references fields from another object in Salesforce. This type of formula allows users to calculate and display data from multiple objects on a single record.

- Go to setup → click on Object Manager → type object name (consumer) in the search bar Click on Fields &Relationships → click on New.
- Select Data type as “Formula” and click Next.
- Give Field Label and Field Name as “Amount Paid” and select formula return type as “Number” Formula : **rice_taken_by_shops__c*rice_mill_name__r.rice_price_kg__c**



- Give Field Label and Field Name as " **AmountPaid**" and select formula return type as "Number" and Next.
- Go to setup → click on Object Manager → type object name (consumer) in the search bar
- Click on **Fields & Relationships** → click on **New**.
- Select Data type as "Formula" ,click Next.
- Give Field Label and Field Name as "Consumer Name" and select formula return type as "**TEXT" click Next**.
- Insert field formula should be: **First_Name__c+"+Last_Name__c**,Check For syntax.

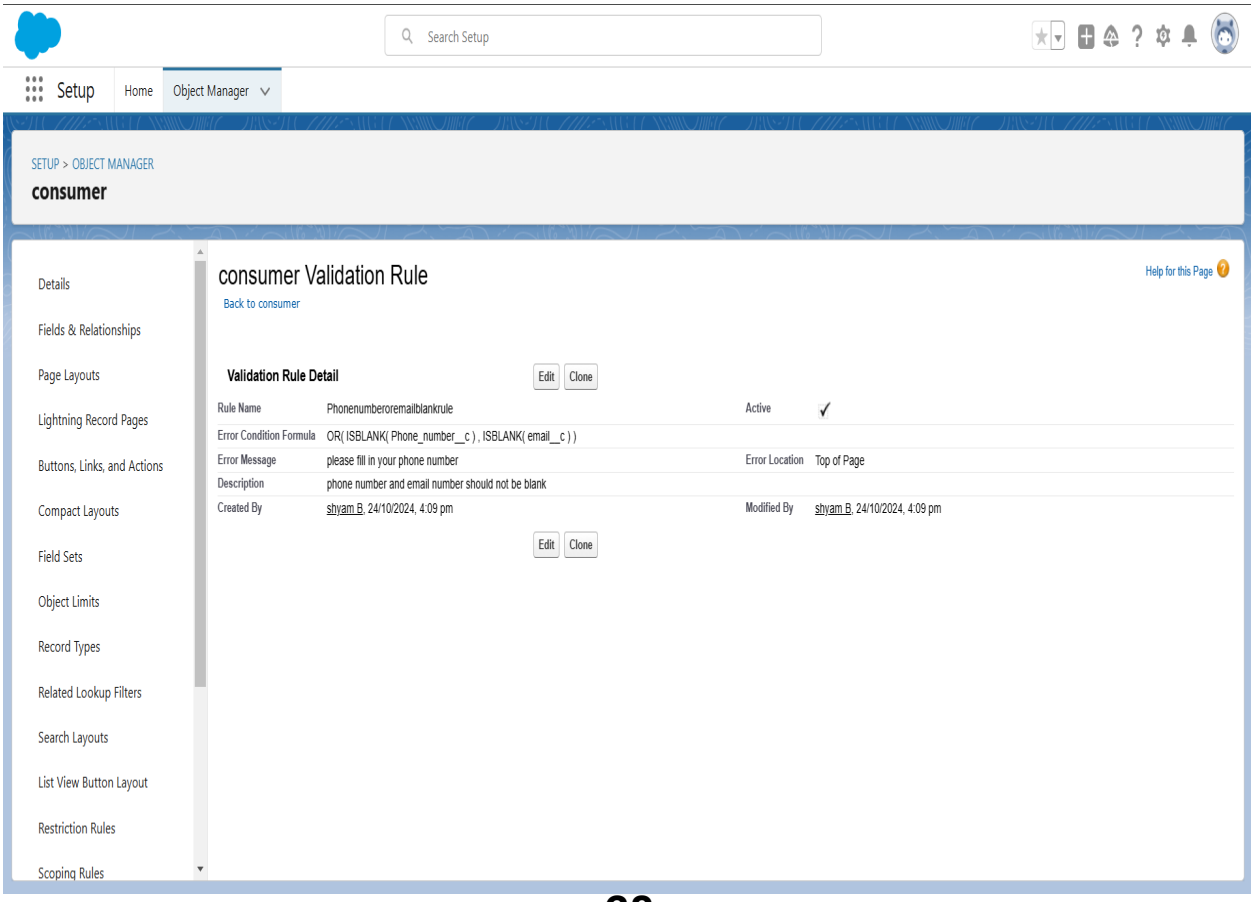


Creating the Validation Rule

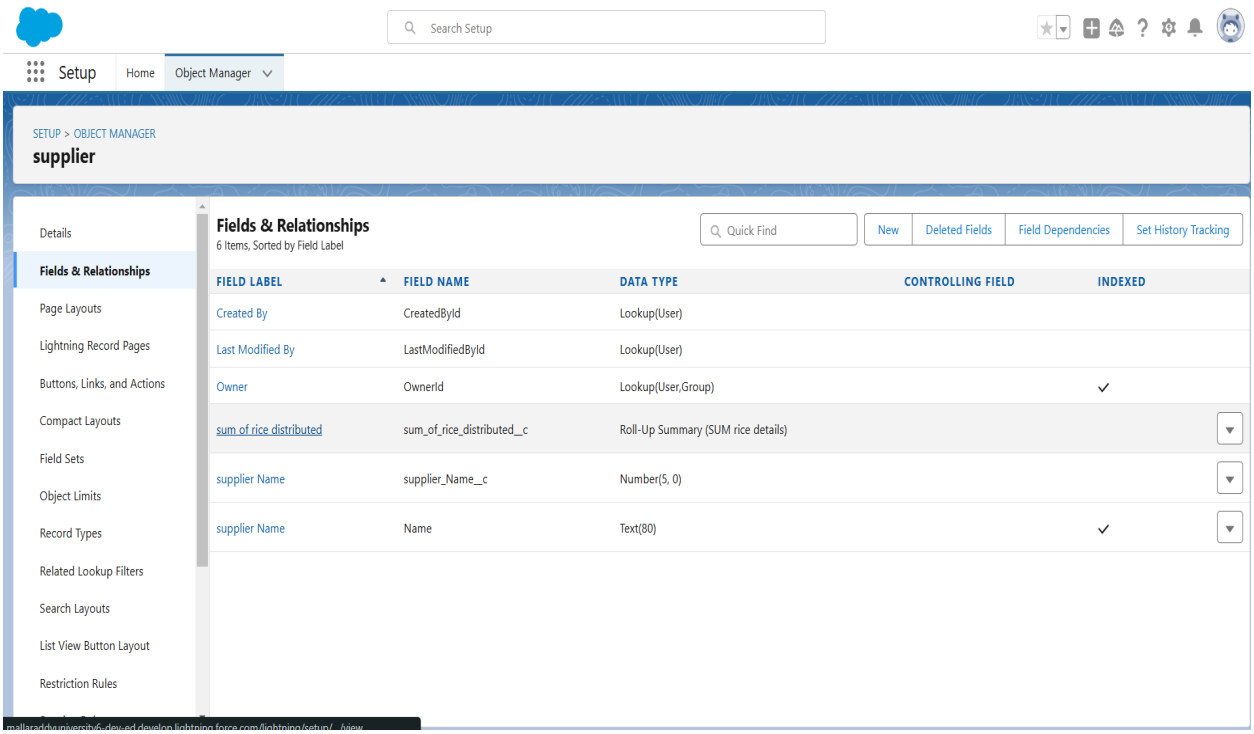
Improve the quality of your data using validation rules. Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of “True” or “False”.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.

Creating the Validation Rule for Phone Number Field in Consumer Object

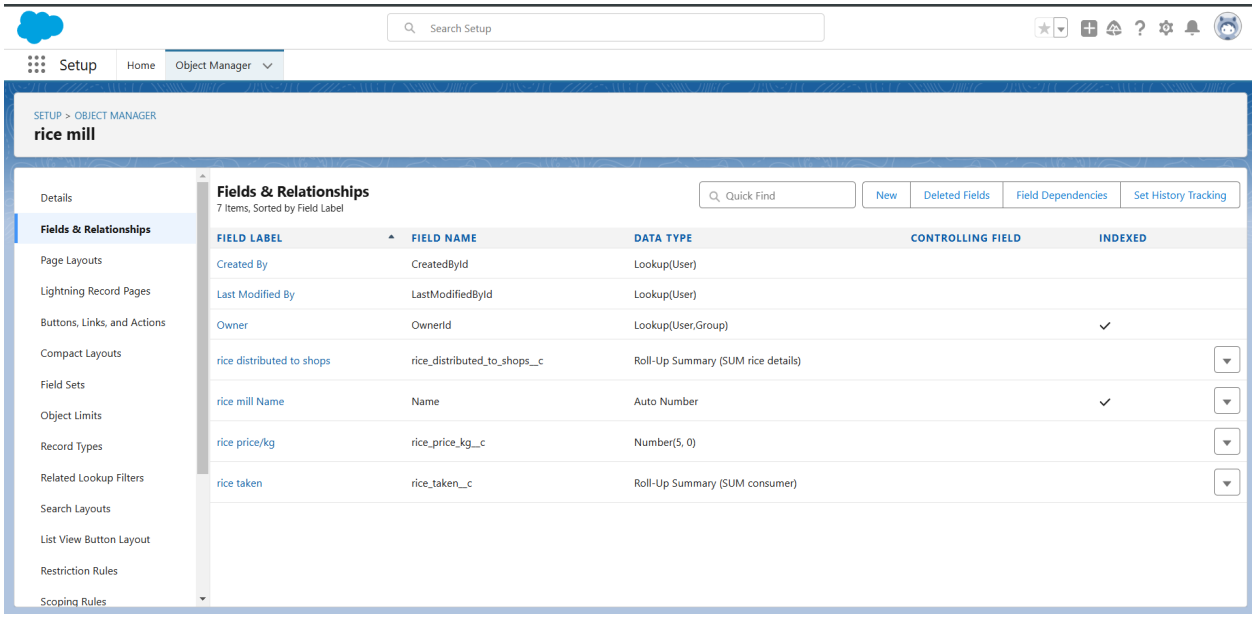
- Go to the setup page → click on Object Manager → from the dropdown click edit for the consumer object.
- Click on Validation Rules → click **New**.
- Enter the Rule Name as “**Phone number or email blank rule**”.
- Enter the Description as “**Phone number and email should not be blank**”.
- enter the formula as: **OR(IS L NK(phone_number__c),IS L NK(email__c))**.
- **Check** the syntax.
- Under the Error Message , Write “**Please fill in your Phone Number**”.
- **Save** Validation rule



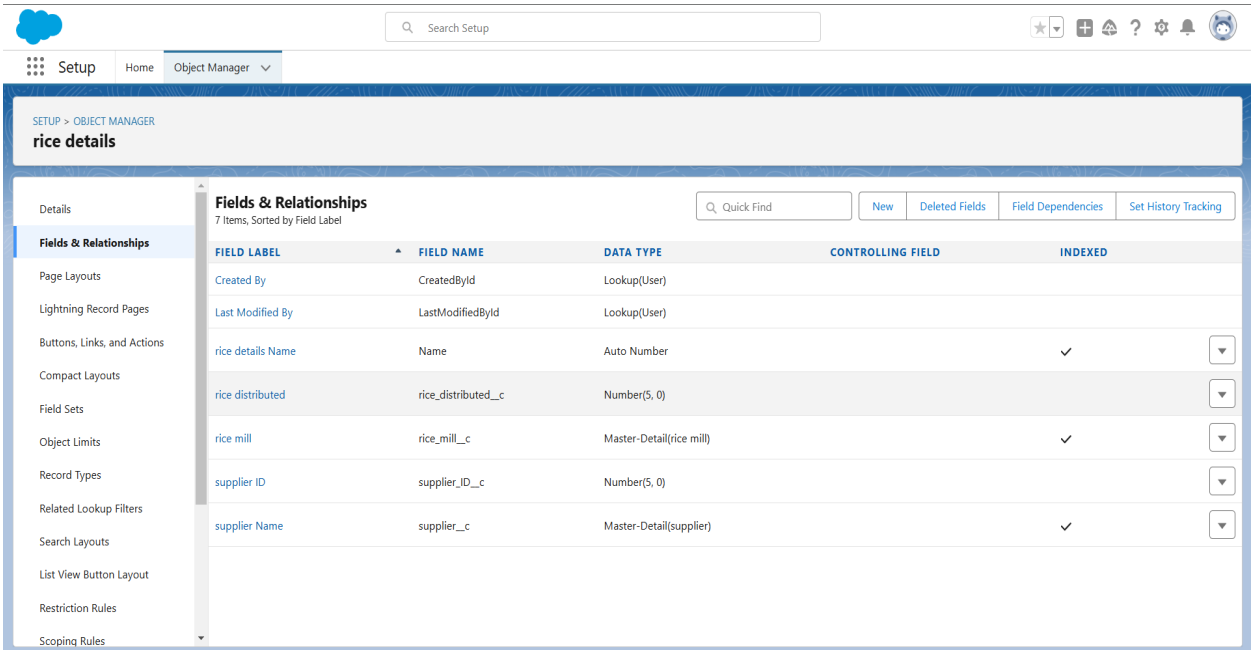
Overall Supplier Fields



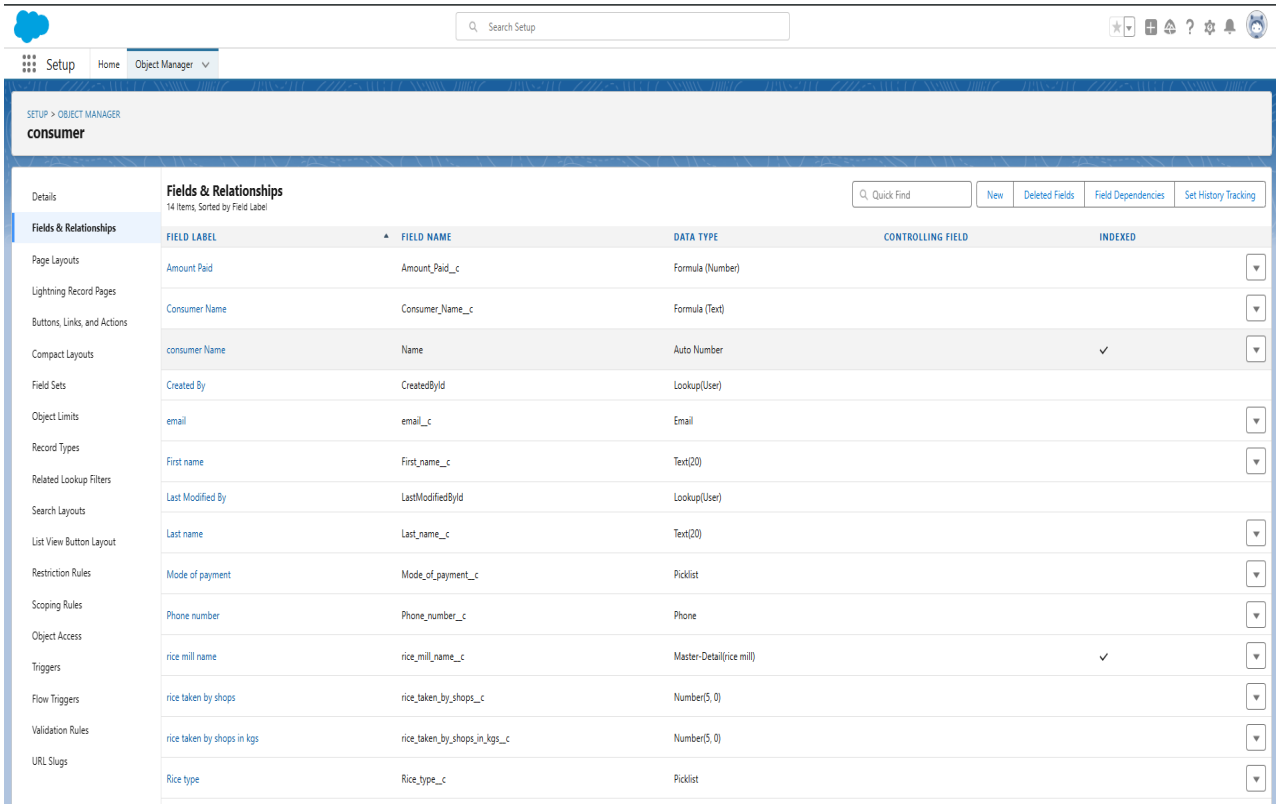
Overall Rice Mill Fields



Overall Rice Details Fields



Overall Consumer Fields



TASK-6

Page Layouts

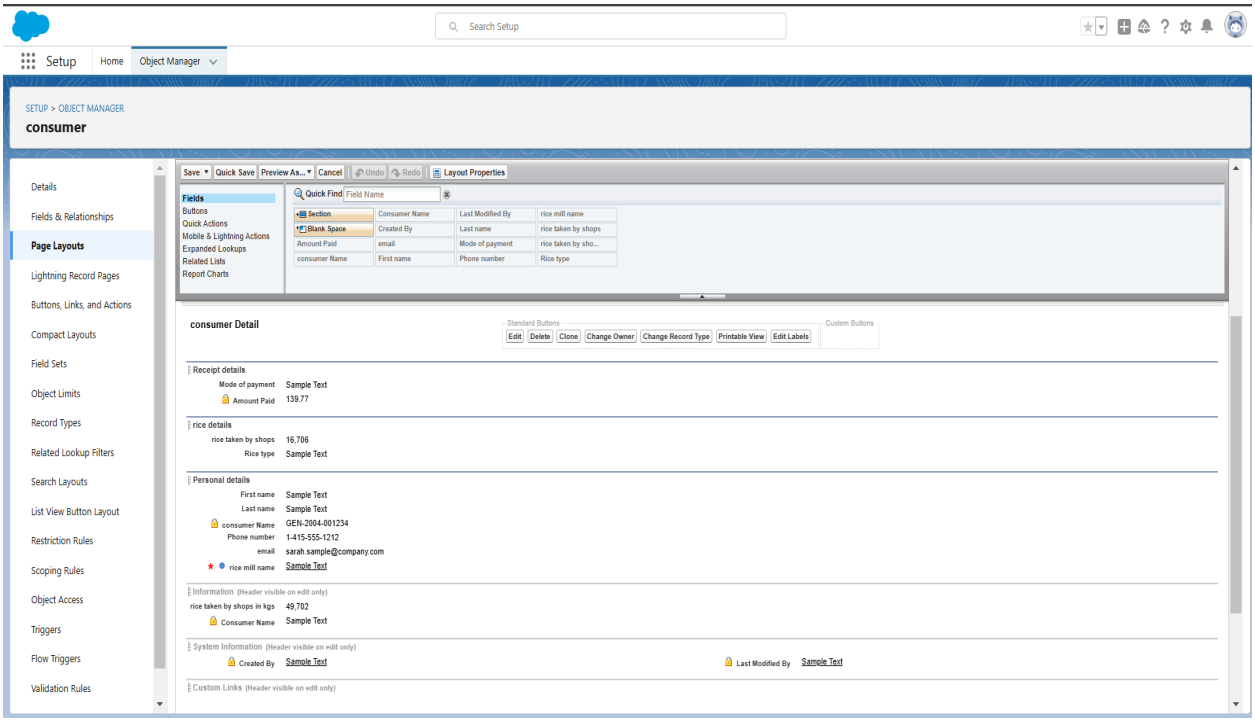
Page Layout in Salesforce allows us to customize the design and organize detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

Creating the Page Layout

- Go to Setup → Click on Object Manager → Search for the object (consumer) → From the drop down select the object and click on it.
- Click on Page Layout → Click on **New**.
- Select the existing page layout, and give the page layout name as “consumer layout”, and click **Save**.
- Drag and drop the section field to Consumer Details and create the section.
- Enter the section name as “Personal Details”, → click **Ok**.
- Now drag the fields to this section that are mentioned: First Name , Last Name , Consumer Name , etc.

Follow the same process for another two sections as shown above. They are:

- Section:" **Rice Details**" Fields: **Rice Taken by Shop, Rice Type**
- Section: "**Receipt Details**"Fields: **Mode of Payment, Amount Paid**
- Click **Save**



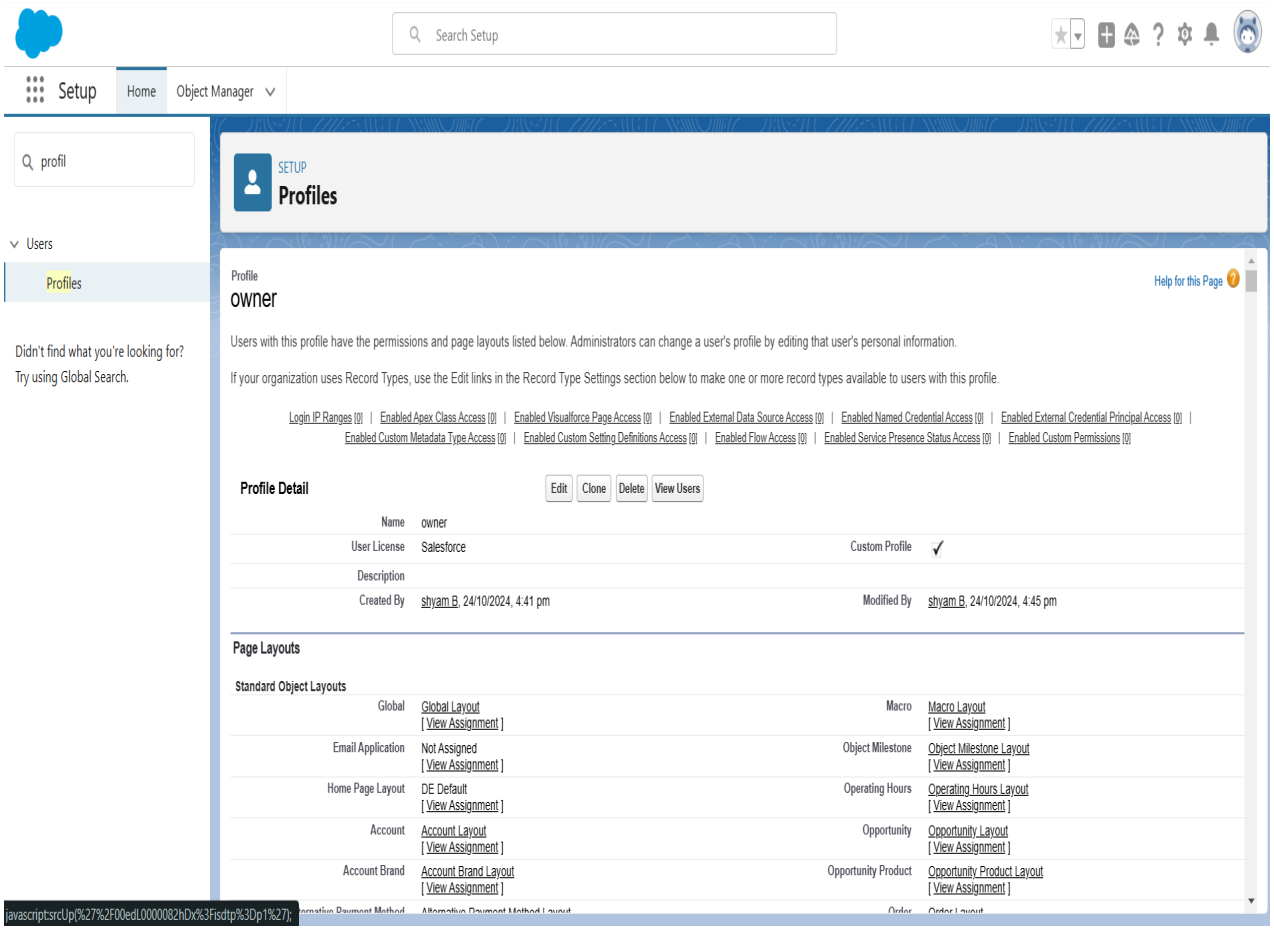
TASK-7

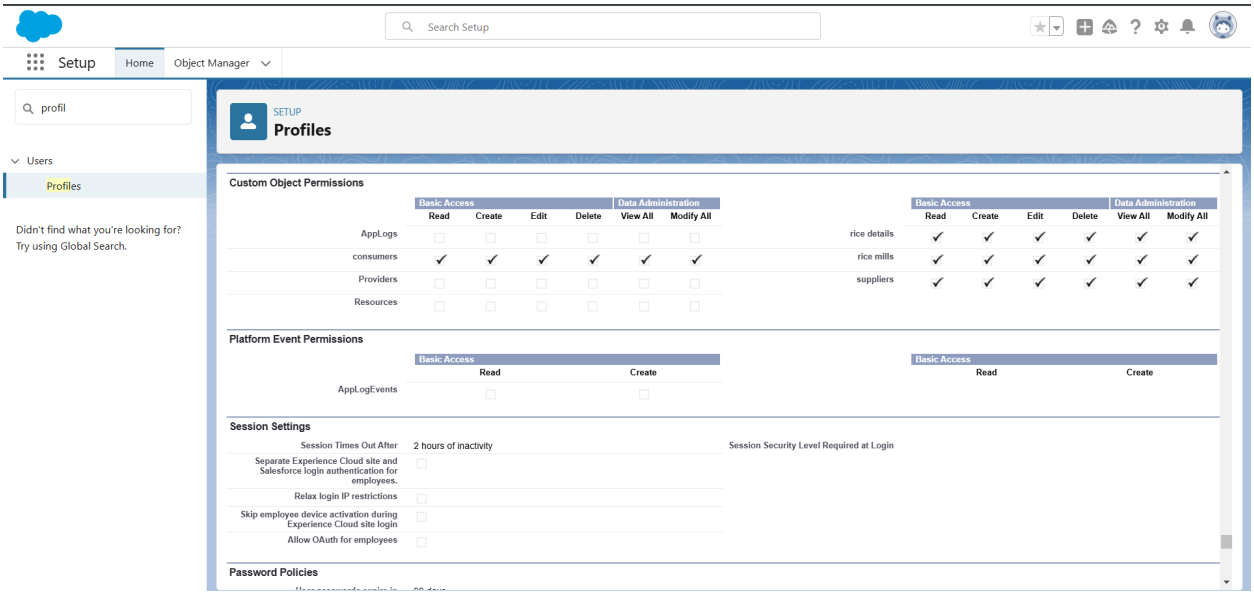
Profiles

A profile is a group/collection of settings and permissions that define what a user can do in Salesforce. Profiles control object permissions, field permissions, user permissions, tab settings, app settings, Apex class access,Visualforce page access, page layouts, record types, login hours, and login IP ranges. You can define profiles by the user's job function. For example, System Administrator, Developer, Sales Representative.

Owner Profile To create a new profile:

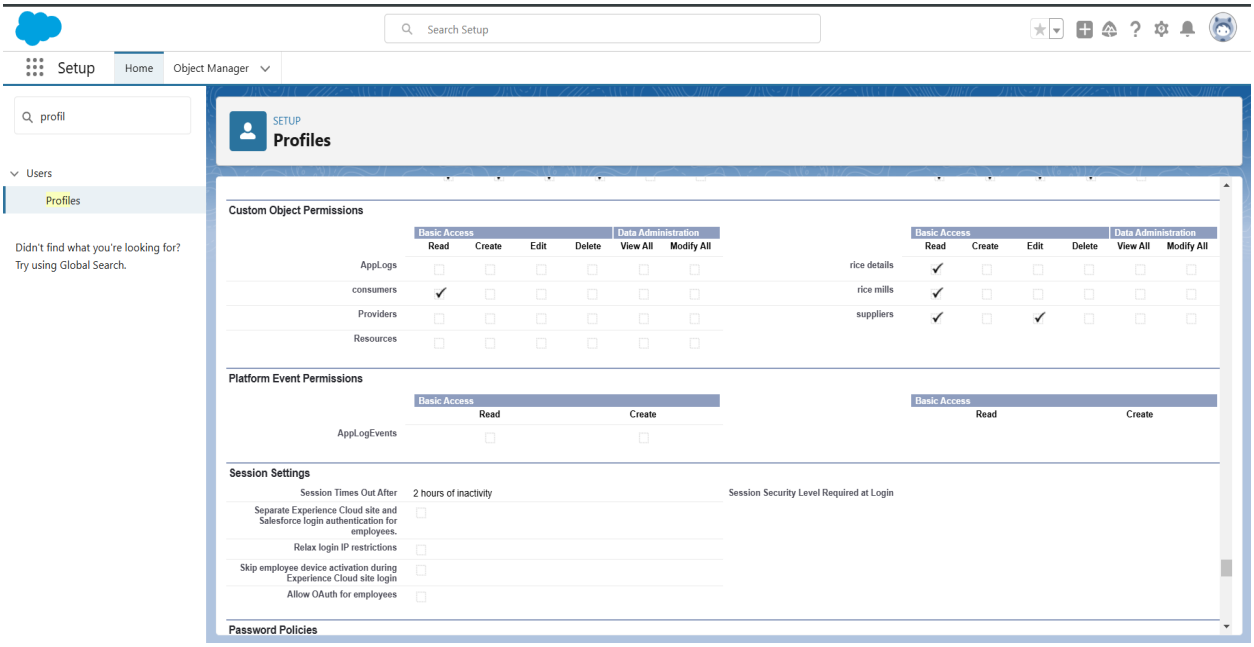
- Go to Setup → type "**Profiles**" in the quick find box → click on **Profiles** → clone the desired profile(**Standard User**) → enter profile name (**Owner**) → **Save**.
- Scroll down to Custom Object Permissions and give access permissions for consumers, **rice details ,rice mill, and suppliers objects as mentioned in the below diagram.**
- Give access and **save it**





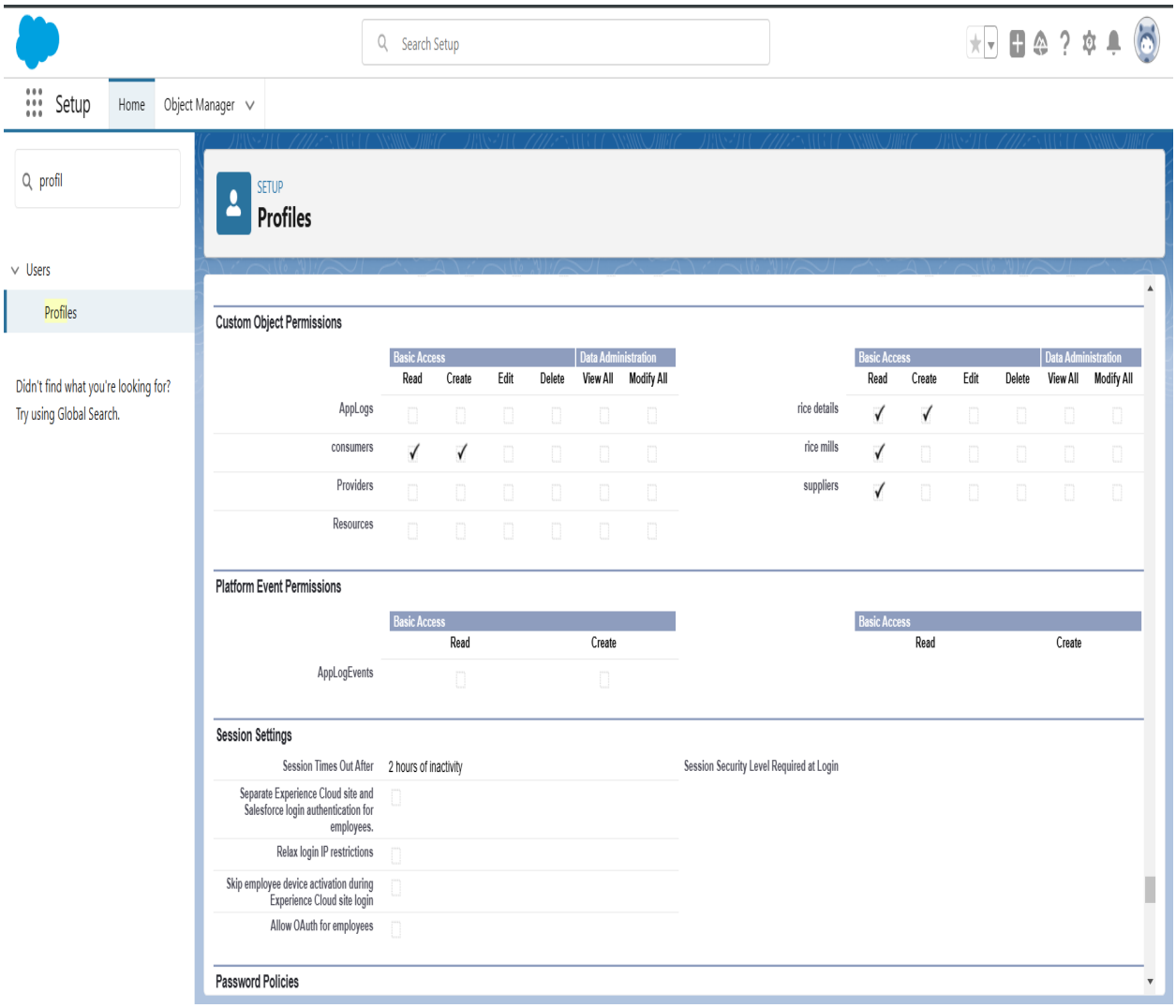
Employer Profile To create a new profile:

- Go to Setup → type "**Profiles**" in the quick find box → click on Profiles → clone the desired profile(**Standard Platform User**) → enter profile name (**Employer**) → **Save**.
- While still on the profile page, click **Edit**.
- Select the Custom App settings as default for the rice mill.
- 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.
- Click **Save**.



Workers Profile To create a new profile:

- Go to Setup → type "**Profiles**" in the quick find box → click on Profiles → clone the desired profile(**Standard Platform User)** → enter profile name (**Workers**) → Save.
- While still on the profile page, click **Edit**.
- Select the Custom App settings as default for the rice mill.
- 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.
- Click **Save**.



TASK-8

Role & Role Hierarchy

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Creating Owner Role Creating Owner Role:

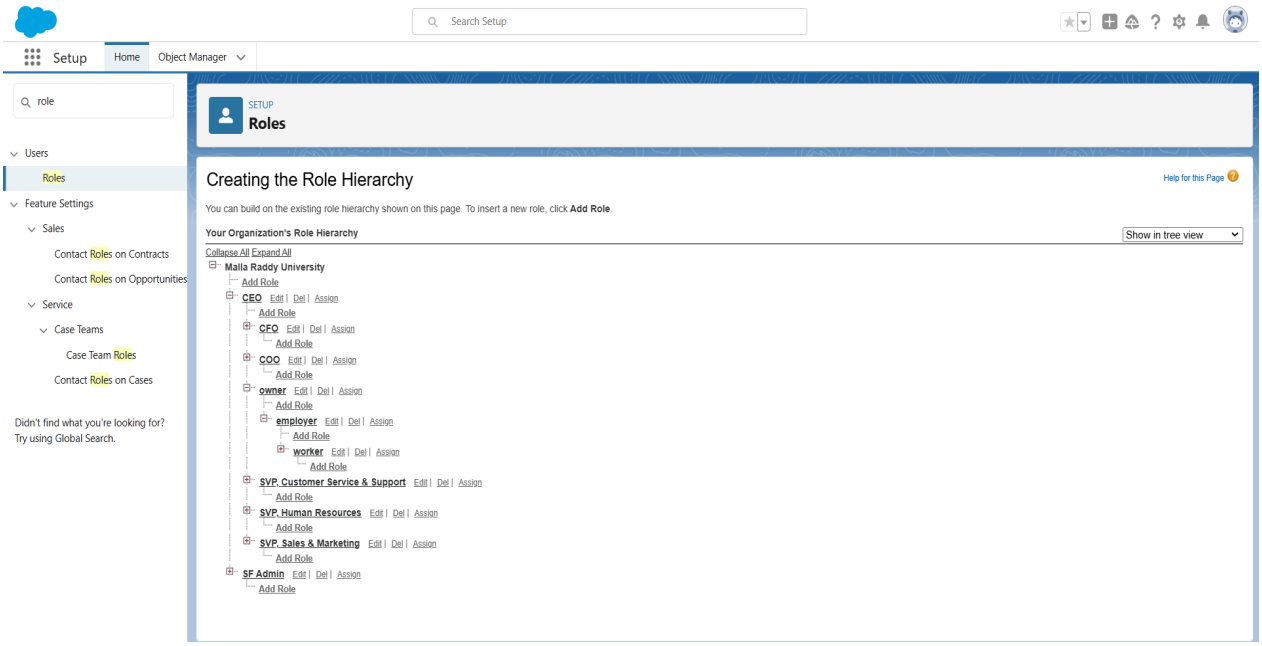
- Go to **Quick** Find → search for Roles → click on **Set Up Roles.**
- Click on Expand All and click on Add Role under whom this role works.
- Give Label as "**Owner"** and Role Name gets auto-populated.
- Then click on **Save**.
- Click and **save it.**

Creating Employer Roles Creating Another Two Roles Under Manager:

- Go to Quick Find → search for Roles → click on **Set Up Roles.**
- Click the plus on **CEO** role, and click Add Role under **Owner**.
- Give Label as "**Employer"** and Role Name gets auto-populated.
- Then click on **Save**.

Repeat the same steps for another role.

- Click the plus on CEO role, and click the plus on Owner, and click Add Role under Employer.
- Give Label as "Worker" and Role Name gets auto-populated.
- Then click on Save.



TASK-9

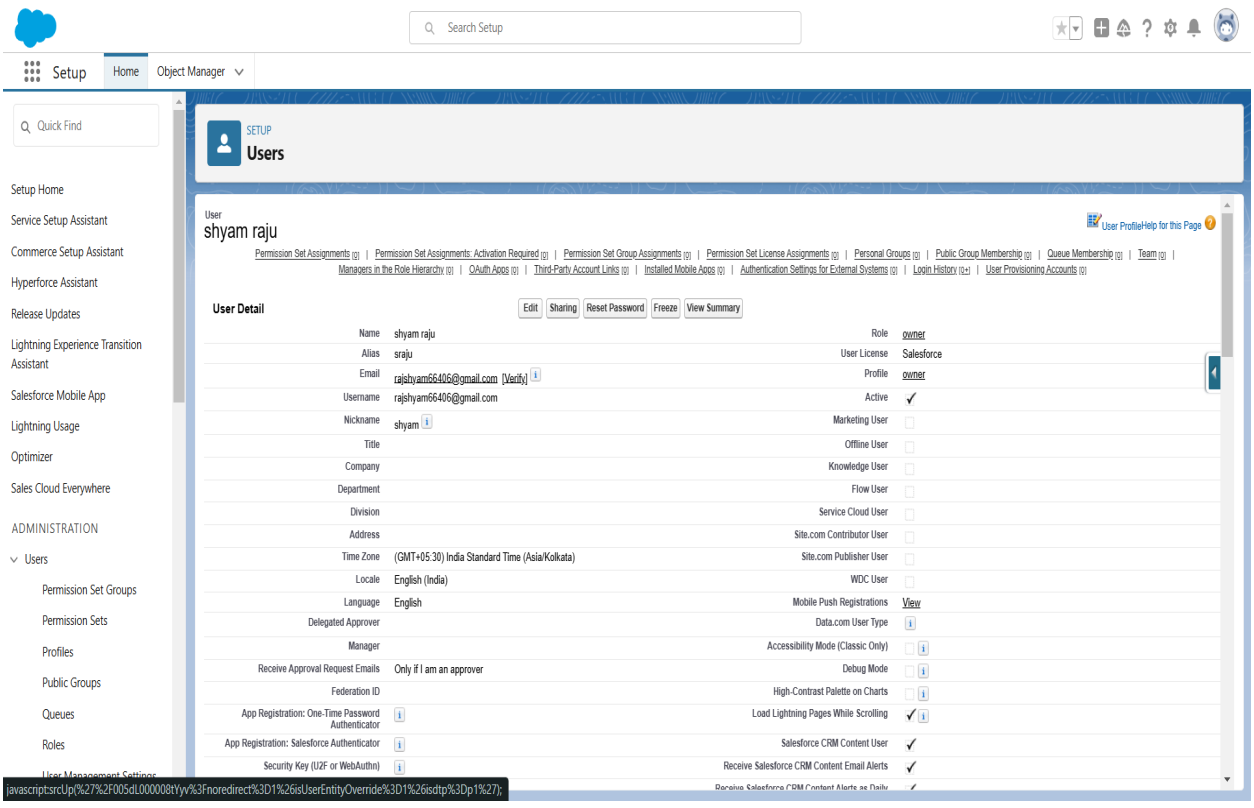
Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers ,and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Create User

Go to Setup → type "Users" in the quick find box → select Users → click New User.
Fill in the fields:

- First Name: **shyam**
- Last Name: **raju**
- Alias: **sraju**
- Email ID: **rajshyam66406@gmail.com**
- Nickname: **shyam**
- Role: **Owner**
- User License: **Salesforce**
- Profile: **Owner**
- **Save it**

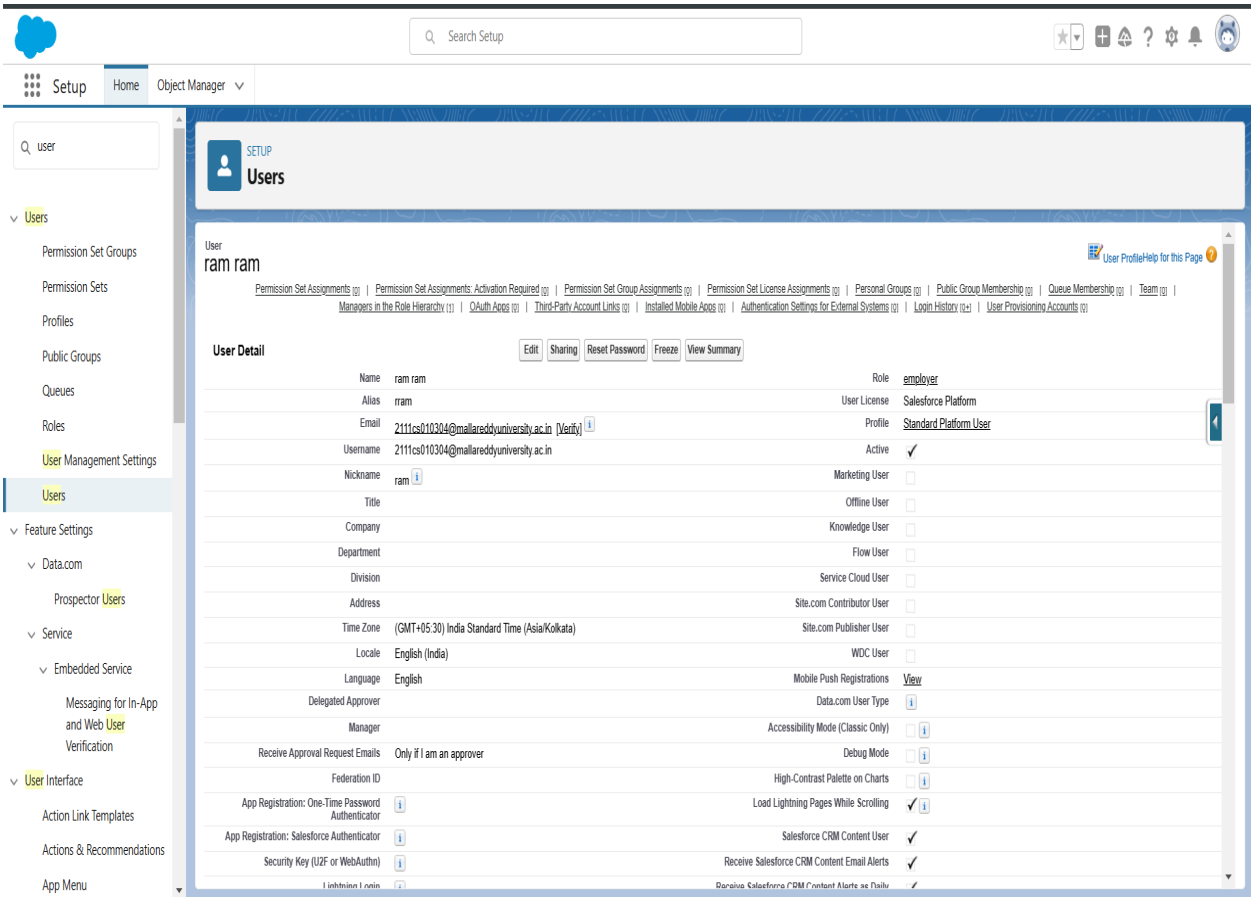


Creating Another Users

Go to Setup → type "Users" in the quick find box → select Users → click New User.
Fill in the fields:

- First Name: **ram**
- Last Name: **ram**
- Alias: **rram**
- Email ID: **2111cs010304@mallareddyunversity.ac.in**
- Nickname: **ram**
- Role: **Employer**
- User License: **Salesforce Platform**
- Profile: **Standard Platform User**

Save it

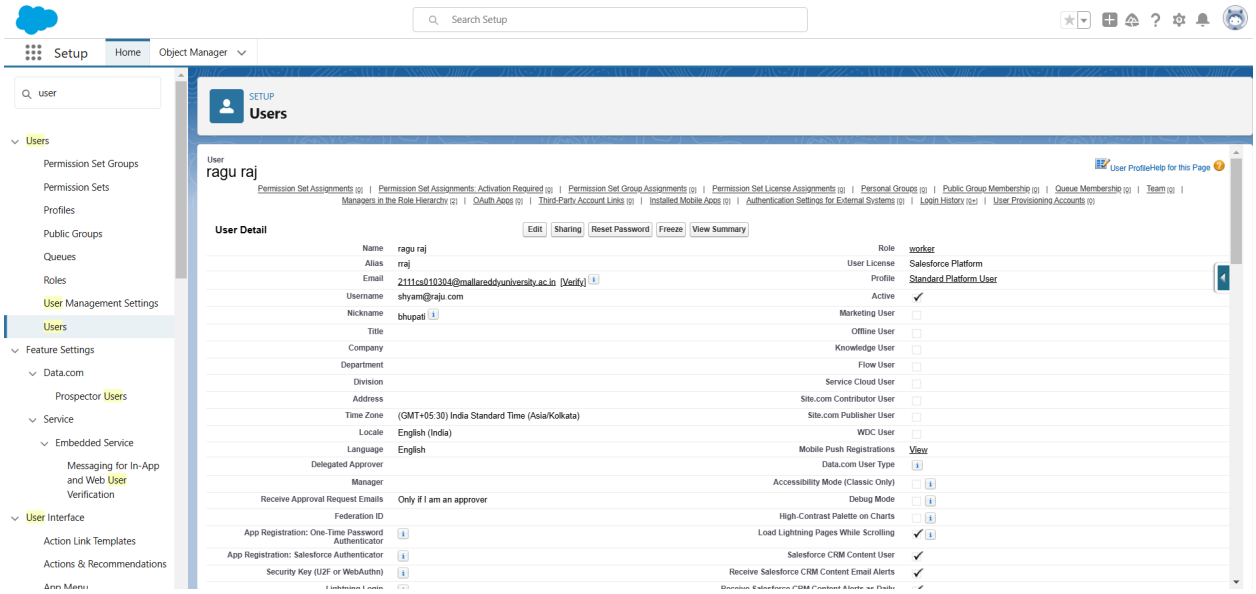


Creating Another Users

Go to Setup → type "Users" in the quick find box → select Users → click New User.
Fill in the fields:

- First Name: **ragu raj**
- Last Name: **raj**
- Alias: **rraj**
- Email ID: **2111cs010304@mallareddyunversity.ac.in**
- Nickname: **bhupati**
- Role: **worker**
- User License: **Salesforce Platform**
- Profile: **Standard Platform User**

Save it



TASK-10

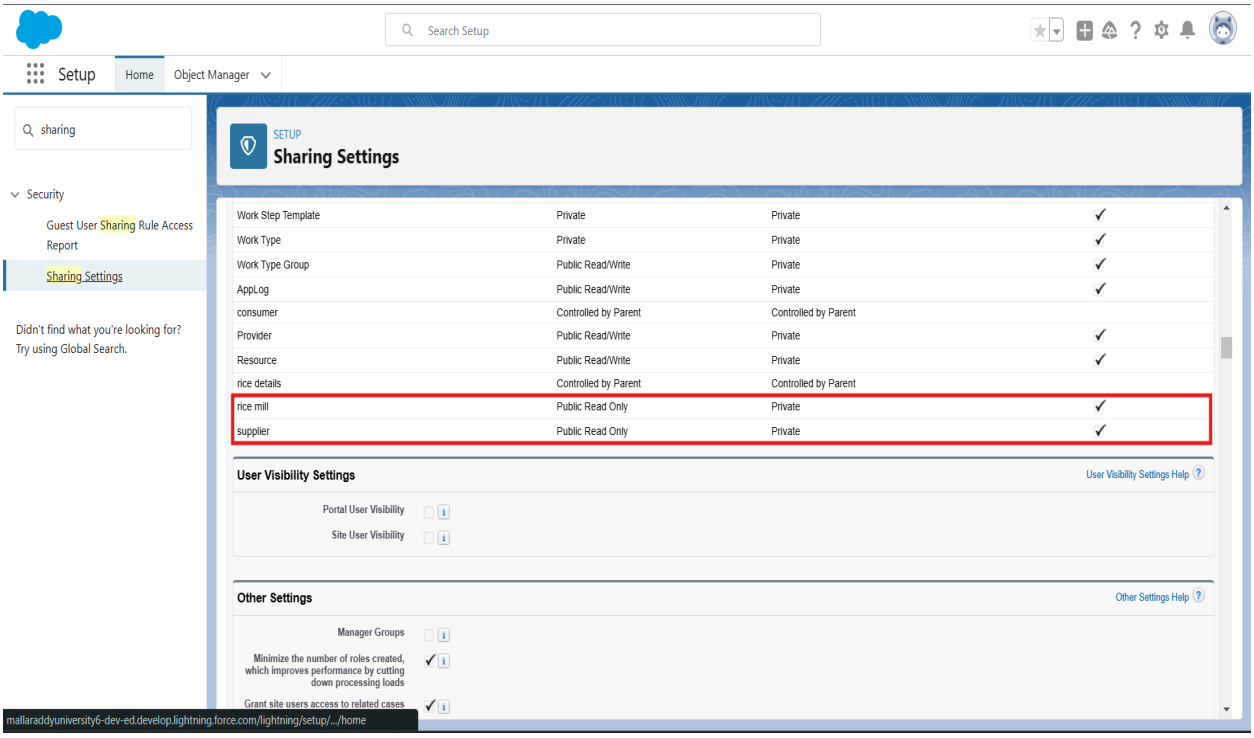
Permission Sets

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles and are the recommended way to manage your users' permissions.

Creating OWD Setting

- Go to Setup → type "**Sharing Settings**" in quick search → Click **Edit**.
- Scroll down, change the default internal access to "Public Read-Only" for Rice Mill and Supplier objects.
- Click **Save**.

By setting the Organization-Wide Defaults (OWD) to "Public Read-Only," every profile has its own access according to their profile. In our case, roles are created and assigned so that the owner can see employer and worker records, and the employer can see worker records.



TASK-10

Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics. Salesforce.com provides a powerful suite of analytic tools to help you organize, view, and analyze your data.

Create Report

- Go to the app → click on the **Reports tab**.
- Click New Report.
- Select for Report Type, search for "**Rice Mill with Consumers**", click on it, and click **Start** Report.

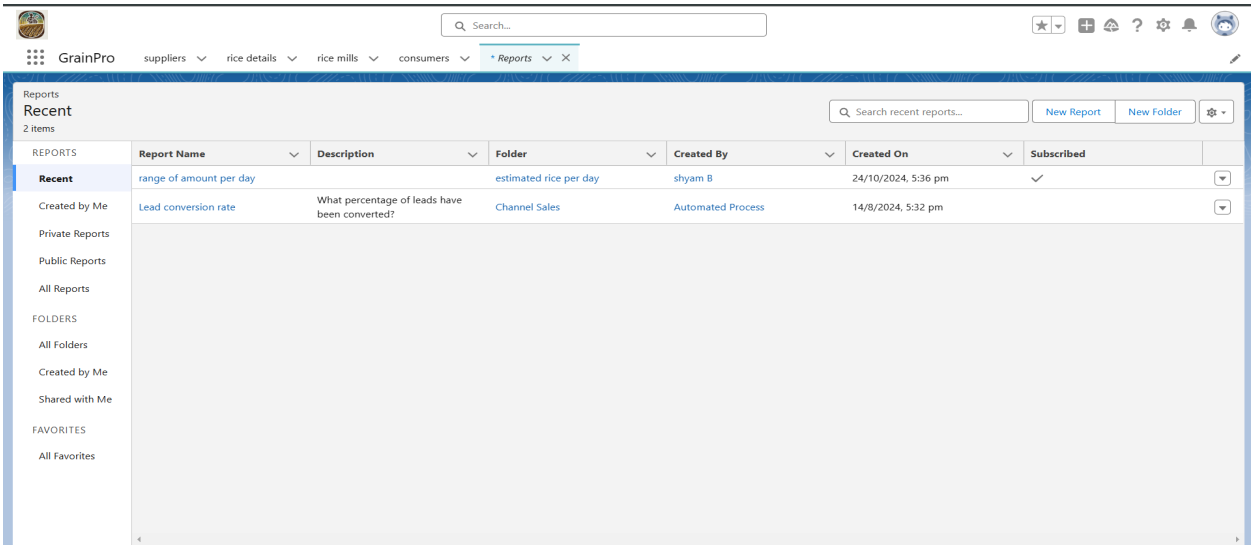
The outline pane is opened already, select the fields that are mentioned below in the Column section:

- **Consumer Name**
- **Rice Type**
- **Rice Price/kg**
- **Mode of Payment**
- **Amount Paid**

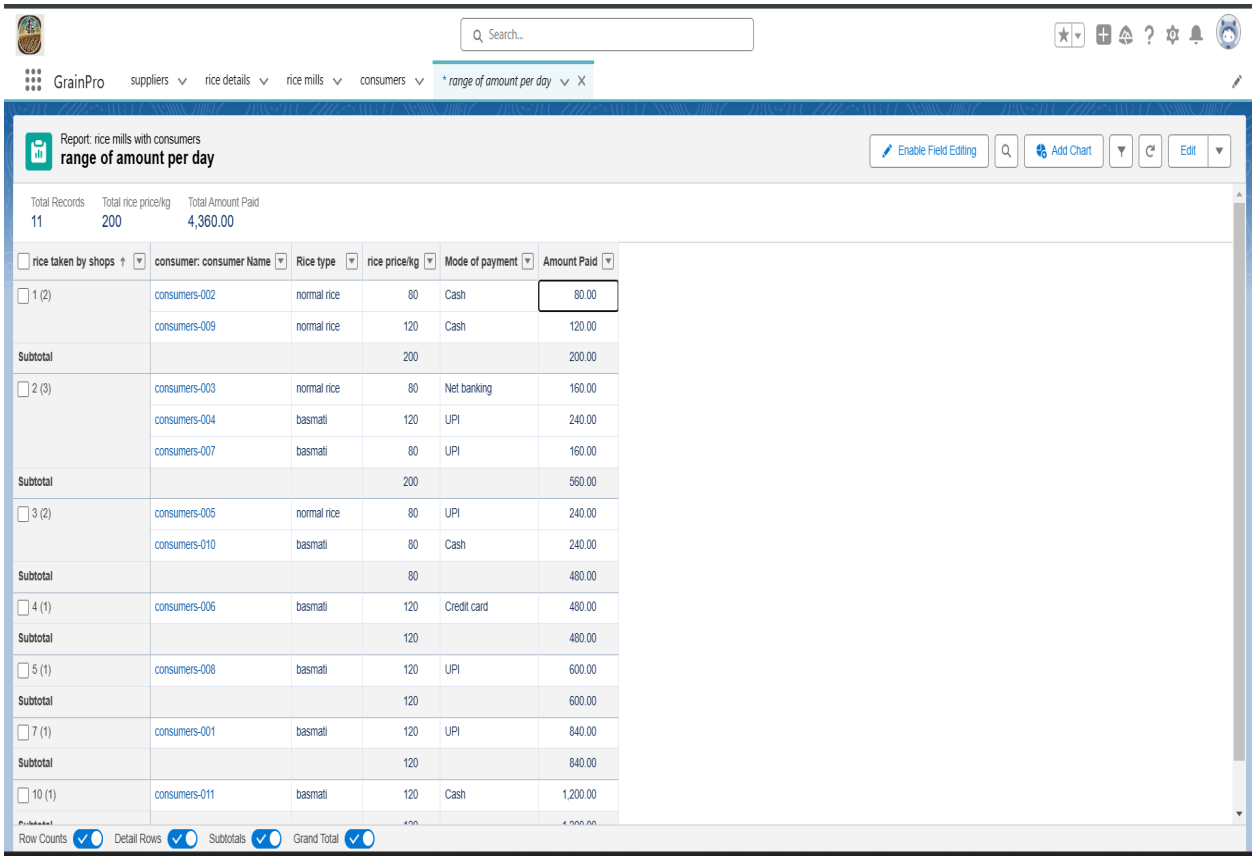
Remove the unnecessary fields.

Select the field that is mentioned below in the Group Rows section:

- Rice Taken by Shops
- Click **Save** and **Run**.
- Save the report as "**Range of Amount per Day**".
- **Save it**



Report(Range of amount per day)



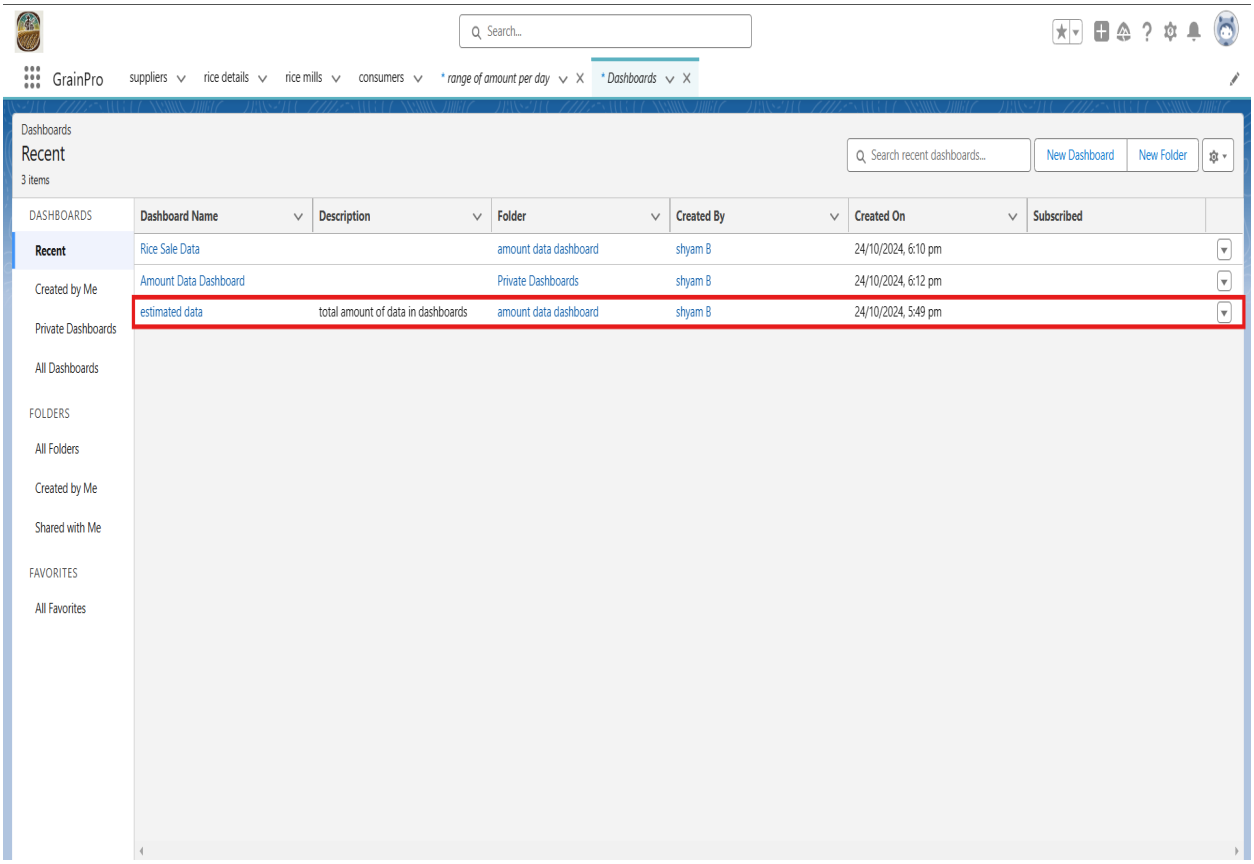
TASK-11

Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

Create Dashboard Folder Steps to Create a Dashboard Folder:

- Click on the **App Launcher** and search for "**Dashboard**".
- Click on the **Dashboard** tab.
- Click **New Folder**.
- Give the Folder Label as "**Amount Data Dashboard**".
- Folder Unique Name will be auto-populated.
- Click **Save**



Create Dashboard

- Go to the App → click on the Dashboards tab.

Give a Name and select the folder that was created, and click Create.

- Select **Add Component.**
- Select a Report and click **Select**.

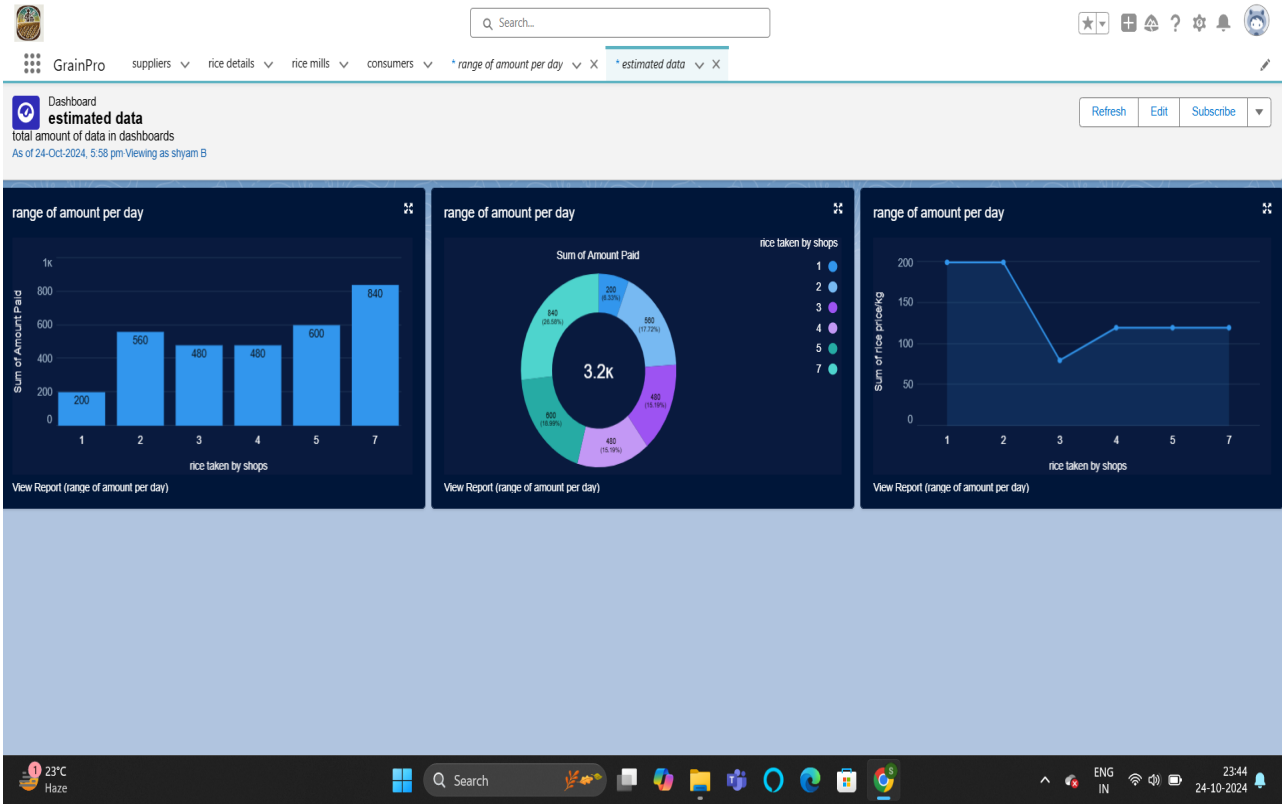
First Component Details:

- 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**

Second Component Details:

- Select **Add Component** with the same steps as above.
- Display as: **Donut Chart**
- Sort by: **Sum of Amount**
- Title: **Range of Amount per Day**
- Component Theme: **Dark**

You can add more graphs if you need



TASK-12

Apex Class and Apex Triggers

Creating an Apex Class(ConsumerRecord)

- Login to the Salesforce account and navigate to the gear account in the top right corner.
- Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.
- Then you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Class.
- Enter the name of the class(ConsumerRecord) to create a new class file.

Code Snippet :

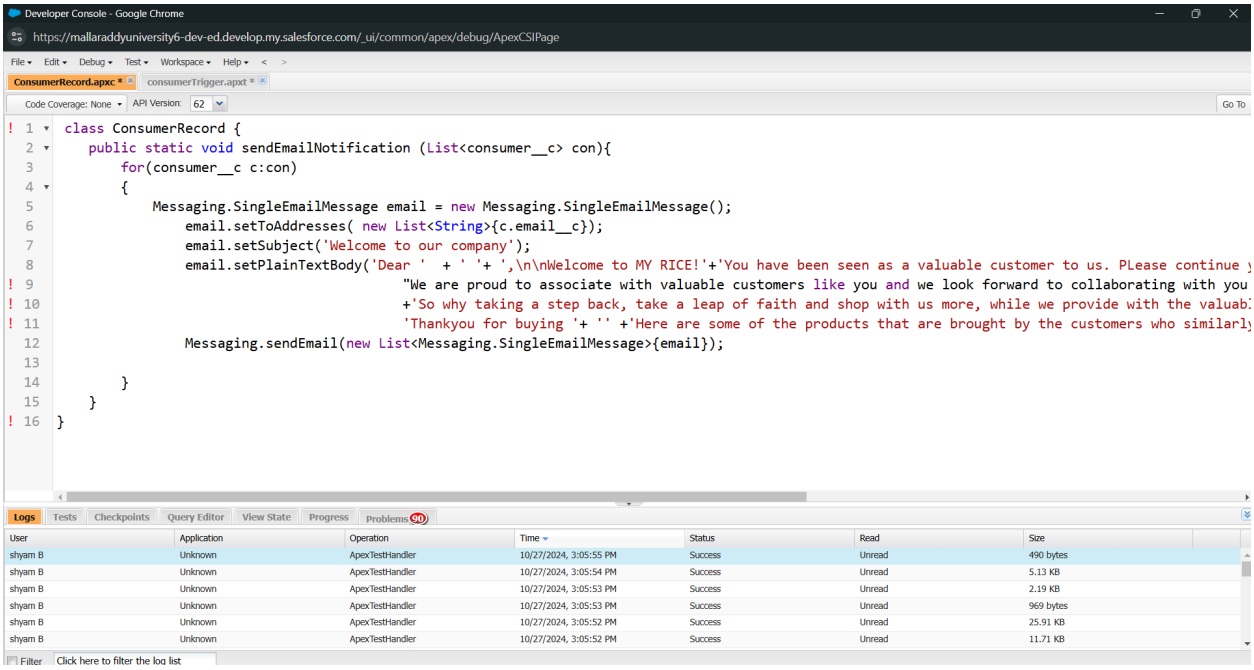
```
class ConsumerRecord {
   public static void sendEmailNotification (List<consumer__c> con){
      for(consumer__c c:con)
      {
         Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
            email.setToAddresses( new List<String>{c.email__c});
            email.setSubject('Welcome to our company');
            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'+
                                   "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'
                                   +'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'+
                                   'Thankyou for buying '+ " +'Here are some of the products that are brought by the customers who similarly bought products like this'+'\n\n');
            Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});

      }
   }
}
```

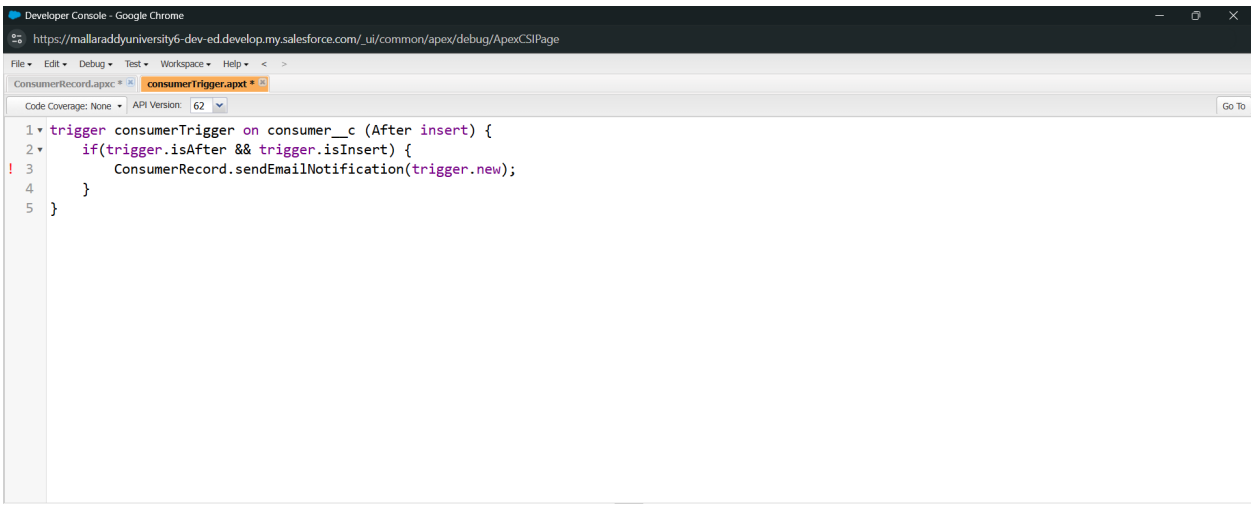
Creating an Apex Trigger

- While still in the trailhead account, navigate to the gear icon in the top right corner.
- Click on developer console and you will be navigated to a new console window.
- Click on the File menu in the toolbar, and click on new? Trigger.
- Enter the trigger name and the object to be triggered.

Trigger code:

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





CONCULSION

The **GrainPro** **Rice Mill CRM Application** successfully provides a comprehensive, user-friendly solution that addresses the unique operational and management needs of a wholesale rice mill. By centralizing daily production data, tracking sales activities, and automating report generation, the system enhances transparency, accuracy, and efficiency across key functions. This CRM application empowers factory owners and managers with timely, actionable insights, enabling informed decision-making and strategic planning based on real-time data.

With its intuitive interface, robust analytics, and secure data management, the Rice Mill CRM Application stands as a valuable tool for improving operational workflow, optimizing inventory control, and strengthening customer relationships. This project marks a significant step forward in modernizing rice mill operations, fostering scalability, and supporting long-term business growth in a competitive industry.

THANK YOU