

PROJECT TITLE : CRM APPLICATION FOR WHOLESALE RICE MILL

1. Project Overview :

The **Rice Mill CRM Application** is a comprehensive solution for managing and simplifying rice production and sales tracking. It enables daily reporting on rice quantity, type, and sales, which is then communicated to the owners. This CRM leverages customer relationship management to enhance customer engagement, streamline operations, and improve efficiency in the rice mill factory. The project aims to deliver a user-friendly application that meets the specific operational needs of a rice mill.

2. Objectives :

Business Goals: The Rice Mill CRM Application will automate daily production and revenue reporting, providing owners with clear insights into operational performance. It will also implement customer analytics to identify buying trends and popular rice varieties, enabling targeted marketing and better customer understanding. Additionally, the application will streamline resource allocation by forecasting demand and analyzing sales patterns, helping the business optimize inventory and manage resources efficiently.

Specific Outcomes: The Rice Mill CRM Application will automate daily production and revenue reporting, track customer buying trends, and optimize resource allocation based demand forecasts and sales patterns, providing clear insights for operational efficiency.

3. Salesforce Key Features and Concepts Utilized :

1. Reporting and Dashboards:

- **Daily Sales and Production Reports:** Generates detailed reports on how much rice is produced & sold each day.
- **Revenue Reports:** Provides insights into daily revenue generated.
- **Customer Analytics:** Tracks popular rice types and most frequent buyers.
- **Resource Allocation:** Helps owners understand data for better resource allocation and future planning.

2. Rollup Summary Field:

- **Purpose:** Summarizes data from a child object to a parent object that shares a master-detail relationship.
- **Functions:** Can use COUNT, SUM, MIN, and MAX functions.

3. Cross-Object Formula Field:

- **Purpose:** References fields from another object in Salesforce.
- **Function:** Calculates the total amount payable by multiplying the number of rice units taken by the price per kg.

4. Validation Rules:

- **Purpose:** Ensures data integrity by validating user inputs.
- **Is Blank Formula:** Verifies if a field is blank and displays an error message if the rule returns a value of "True."
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5. Permission Sets:

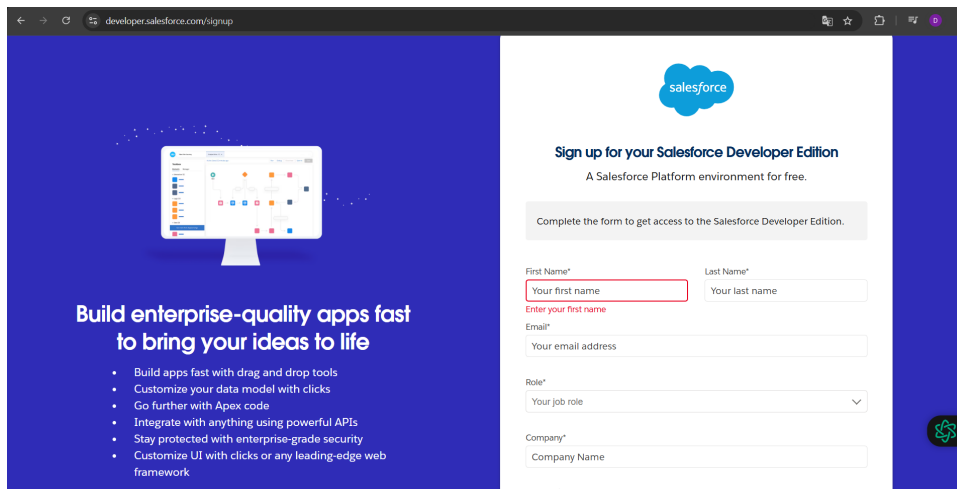
- **Wide Defaults (OWD):** Defines the baseline level of access for the most restricted user.
- **Roles and Access:**
 - **Organization Owner:** Can view records of employers and workers.
 - **Employer:** Can view records of workers.

4. Detailed Steps to Solution Design :

Activity 1: Creating Developer Account and Account activation.

Steps:

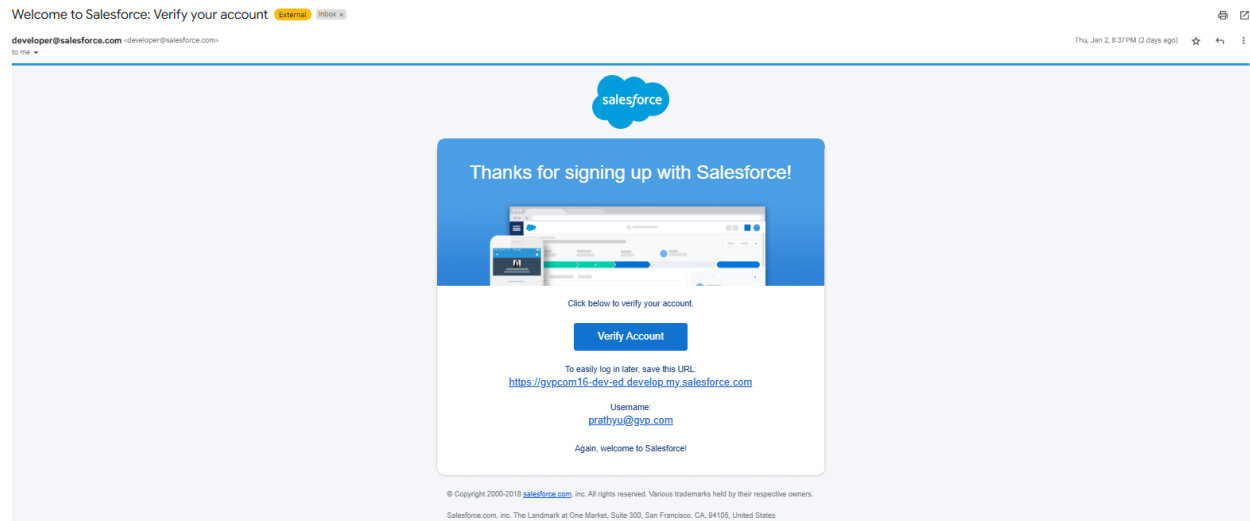
- On the sign up form, enter the following details
- Click on sign me up after filling these.
- First name & Last name
- Email
- Role : Developer
- Company : College Name
- Country : India
- Postal Code : pin code
- Username : should be a combination of your name and company
- This need not be an actual email id, you can give anything in the format.
- username@organization.com



The screenshot shows the Salesforce Developer Edition sign-up page. On the left, there is a blue sidebar with a white box containing a diagram of a system architecture. Below this, the text reads: "Build enterprise-quality apps fast to bring your ideas to life". A list of bullet points follows: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". On the right, the main content area is white with a blue header bar containing the Salesforce logo. The heading is "Sign up for your Salesforce Developer Edition", followed by the subtext "A Salesforce Platform environment for free." and a prompt "Complete the form to get access to the Salesforce Developer Edition." The form fields include: "First Name*" (with a red border and placeholder "Your first name"), "Last Name*" (with placeholder "Your last name"), "Email*" (with placeholder "Your email address"), "Role*" (a dropdown menu with "Your job role" selected), and "Company*" (with placeholder "Company Name"). At the bottom, there is a small "Create Developer" button.

ACTIVATION :

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.



Activity 2: Objects

Salesforce objects are of two types:

1. **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. are the heart of any application and provide a structure for sharing data.

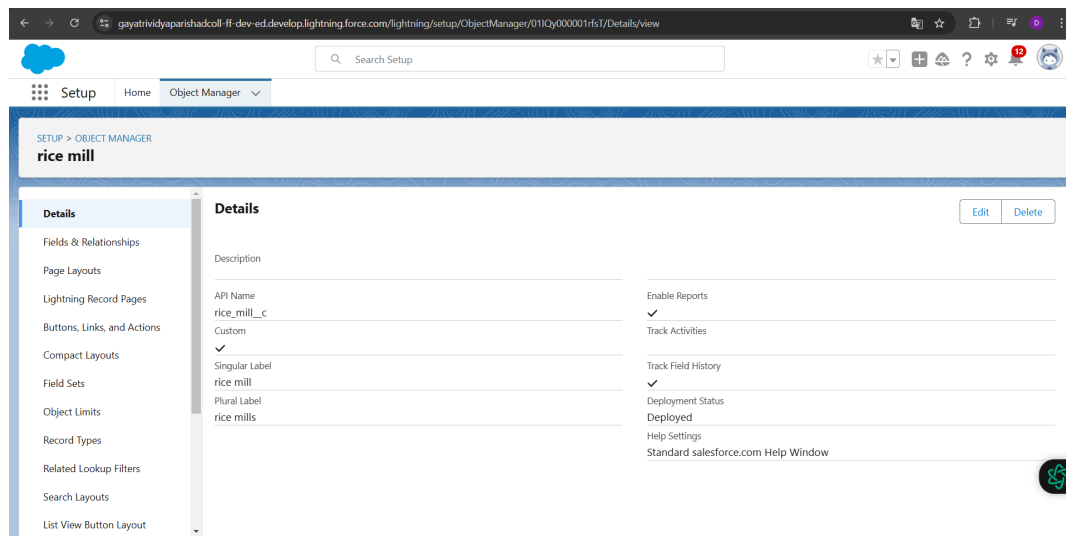
Steps:

1.Create Supplier Object

1. From the setup page >> Click on Object Manager>> Click on Create>>Click on Custom Object.
2. Enter the label name>>supplier
3. Plural label name>>supplier
4. Enter Record Name Label and Format
5. Record Name >> supplier Name
6. Data Type>>Text
7. Click on Allow reports and Track Field History and allow search
8. Allow search >> Save.

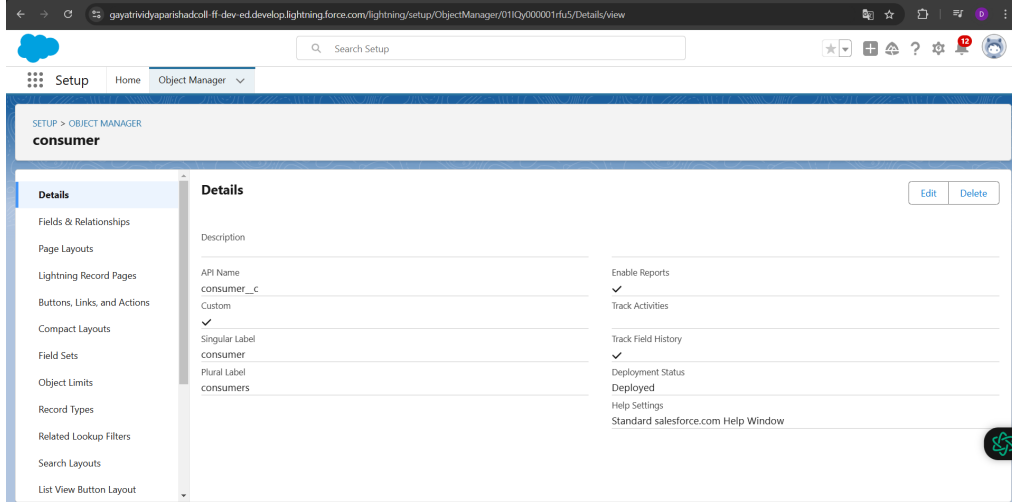
2. Create Rice mill Object

1. From the setup page >> Click on Object Manager>>Click on Create >> Click on Custom Object.
2. Enter the label name>>rice mill
3. Plural label name>> rice mills
4. Enter Record Name Label and Format
5. Record Name >>
6. Data Type >> Auto Number
7. Display Format >> rice-{000}
8. Starting number >> 1
9. Click on Allow reports and Track Field History, Allow Search and Save.



3. Create consumer Objects

1. Use these display format for the consumer
2. label name >> consumer
3. Plural label name >> consumers
4. Display Format >> consumers-{000}
5. Starting number >> 1




4.Create rice details Objects

1. Use these display format for the rice details
2. label name >> rice details
3. Plural label name >> rice details
4. Display Format >> rice-{000}
5. Starting Number >>1

Activity 3: Tabs

1. Creating a Custom Tab
2. To create a Tab:(supplier)
3. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
4. 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 .
5. Make sure that the Append tab to users' existing personal customizations is checked.
6. Click save.






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.

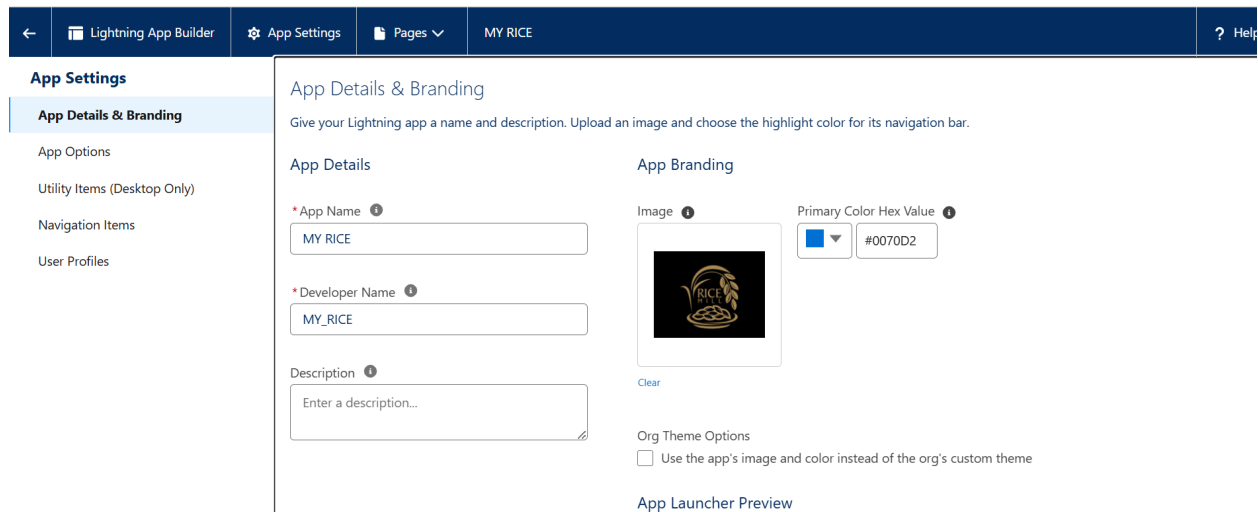
Custom Object Tabs
[New](#)
[What Is This?](#)

Action	Label	Tab Style	Description
Edit Del	consumers	 Balls	
Edit Del	rice_details	 Apple	
Edit Del	rice_mills	 Alarm clock	
Edit Del	supplier	 Airplane	

Activity 4: The Lightning App

Create a Lightning App

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 Item:
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:
7. Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.



← Lightning App Builder App Settings Pages MY RICE ? Help

App Settings

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

App Details & Branding

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

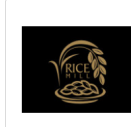
App Details


* App Name [?]
MY_RICE

* Developer Name [?]
MY_RICE

Description [?]
Enter a description...

App Branding

Image [?]

Clear

Primary Color Hex Value [?]
 #0070D2

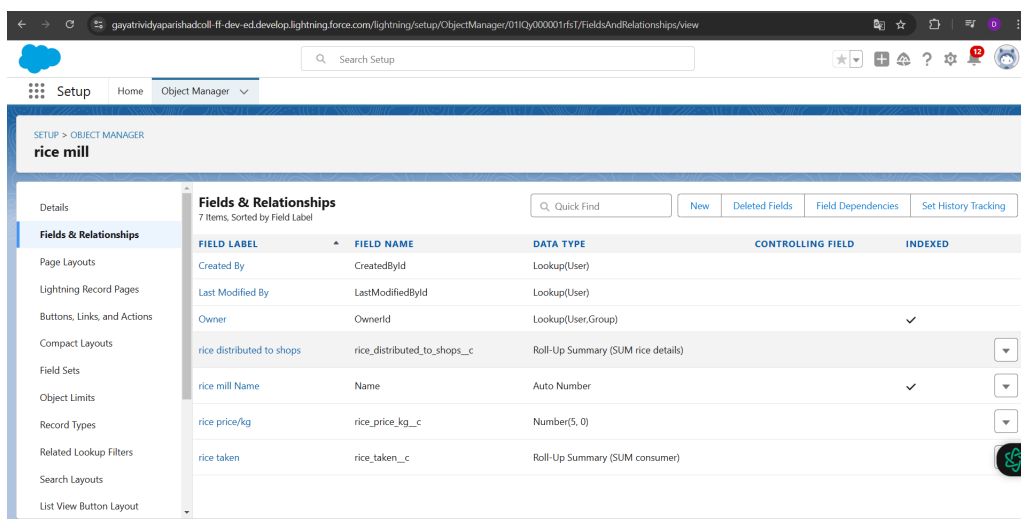
Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

Activity 5: Fields

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 ".
5. Field Name will be auto populated, and click on Next- Next >> Save.



The screenshot shows the Salesforce Object Manager interface for the 'rice mill' object. The 'Fields & Relationships' tab is selected, displaying a table of fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

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)		

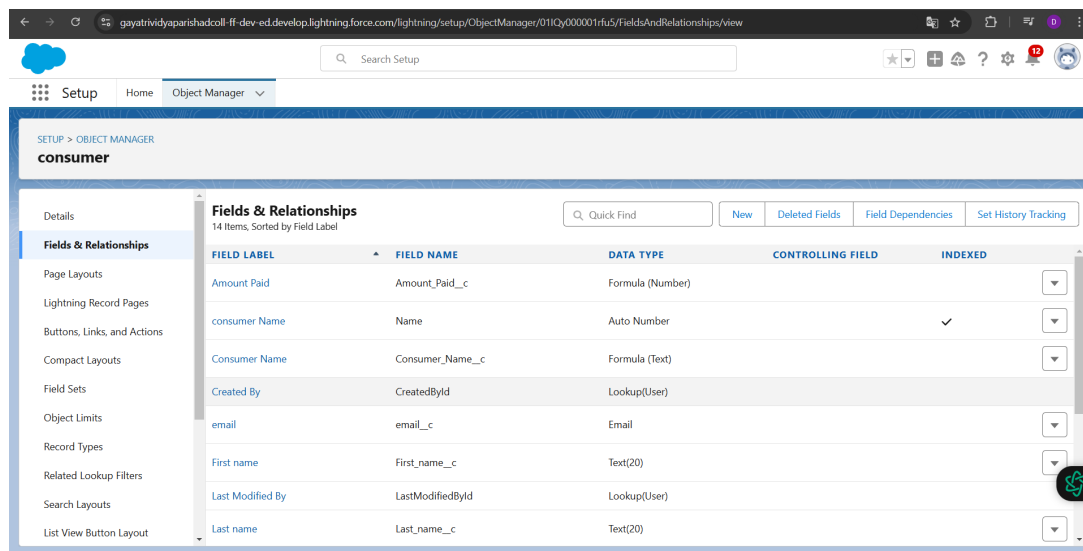
Creating Junction Object

Creating junction object as rice details with supplier & rice mill

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.

Creating 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.



SETUP > OBJECT MANAGER
consumer

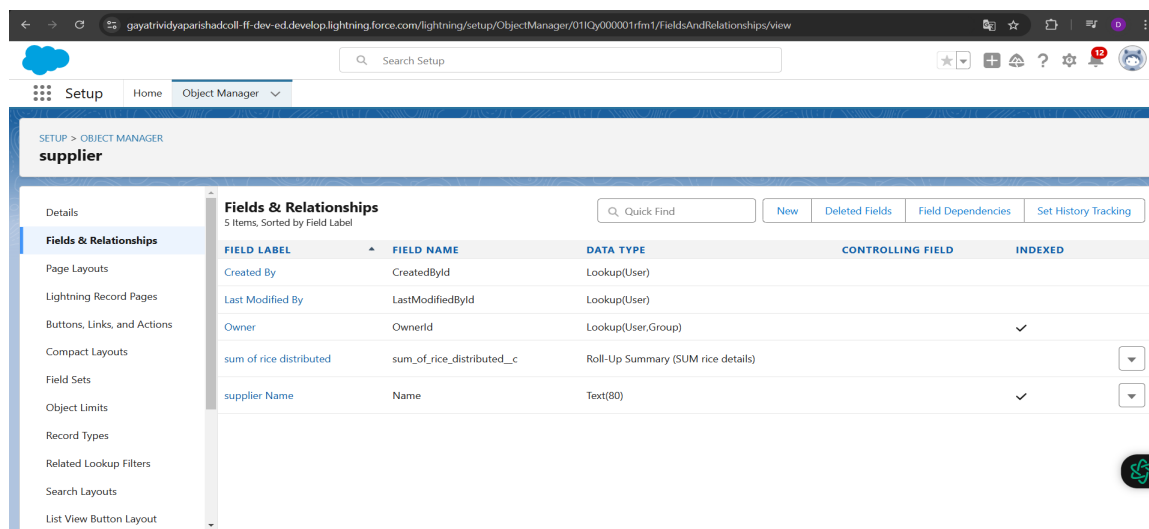
Details

Fields & Relationships
14 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid__c	Formula (Number)		
consumer Name	Name	Auto Number		✓
Consumer Name	Consumer_Name__c	Formula (Text)		
Created By	CreatedById	Lookup(User)		
email	email__c	Email		
First name	First_name__c	Text(20)		
Last Modified By	LastModifiedById	Lookup(User)		
Last name	Last_name__c	Text(20)		



SETUP > OBJECT MANAGER
supplier

Details

Fields & Relationships
5 Items, Sorted by Field Label

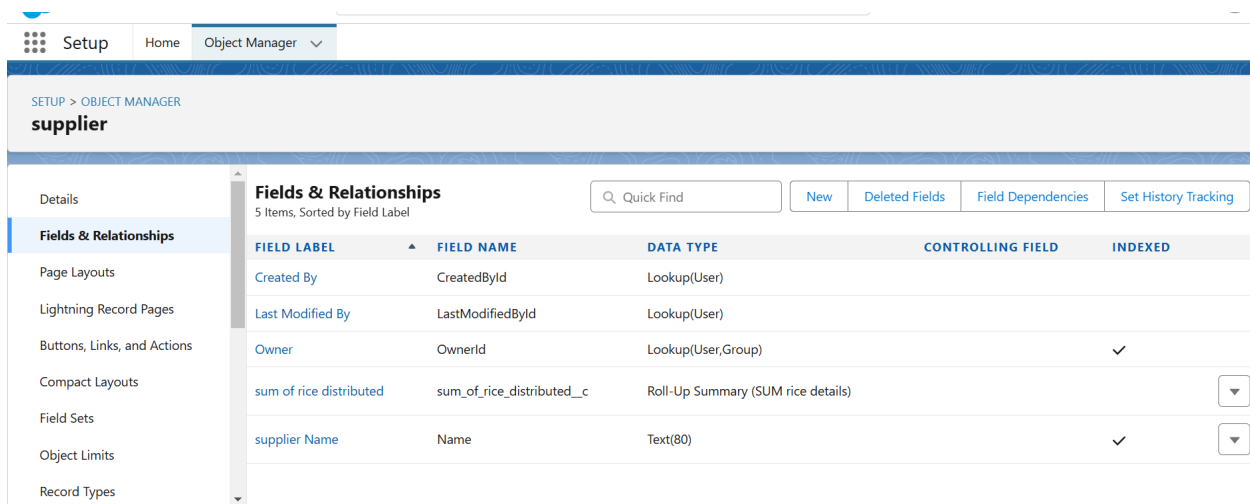
Quick Find

New Deleted Fields Field Dependencies Set History Tracking

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)		✓
sum of rice distributed	sum_of_rice_distributed__c	Roll-Up Summary (SUM rice details)		
supplier Name	Name	Text(80)		✓

Creating the Roll-up Summary

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 screenshot shows the Salesforce Setup interface for the 'supplier' object. The 'Fields & Relationships' section is active, displaying a list of fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot:

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)		✓
sum of rice distributed	sum_of_rice_distributed__c	Roll-Up Summary (SUM rice details)		
supplier Name	Name	Text(80)		✓

Details	Fields & Relationships 6 Items, Sorted by Field Label				<input type="text" value="Quick Find"/>	New	Deleted Fields	Field Dependencies	Set History Tracking
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED				
Page Layouts	Created By	CreatedById	Lookup(User)						
Lightning Record Pages	Last Modified By	LastModifiedById	Lookup(User)						
Buttons, Links, and Actions	Owner	OwnerId	Lookup(User,Group)		✓				
Compact Layouts	rice mill Name	Name	Auto Number		✓				
Field Sets	rice price/kg	rice_price_kg__c	Number(5, 0)						
Object Limits	rice taken	rice_taken__c	Roll-Up Summary (SUM consumer)						
Record Types									

Creating the validation rule

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.

SETUP > OBJECT MANAGER

consumer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

consumer Validation Rule

Back to consumer

Validation Rule Detail

EditClone

Rule Name	Phonenumberoremailblankrule	Active	<input checked="" type="checkbox"/>
Error Condition Formula	OR(ISBLANK(Phone_number__c) , ISBLANK(email__c))		
Error Message	please fill in your phone number.	Error Location	Top of Page
Description	phone number and email number should not be blank		
Created By	chintala.chandini, 02/01/2025, 10:39 pm	Modified By	chintala.chandini, 02/01/2025, 10:39 pm
	<div>EditClone</div>		

Help for this Page

Activity 6 : PAGE LAYOUTS

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
7. First name , last name , consumer name , phone number, email, rice mill name.
8. Follow the same process for another two sections as shown above , they are
9. One section is “ rice details ” , drag the fields that are
10. Rice taken by shop, rice type.
11. Another section is “Receipt details ”, and drag the fields that are
12. Mode of payment , Amount paid.
13. Then , Click save.

SETUP > OBJECT MANAGER

consumer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

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

Quick Find Field Name

Fields

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists

Section

Blank Space

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

Personal details

Phone number 1-415-555-1212

Last name Sample Text

email sarah.sample@company.com

★ rice mill name Sample Text

🔒 consumer Name GEN-2004-001234

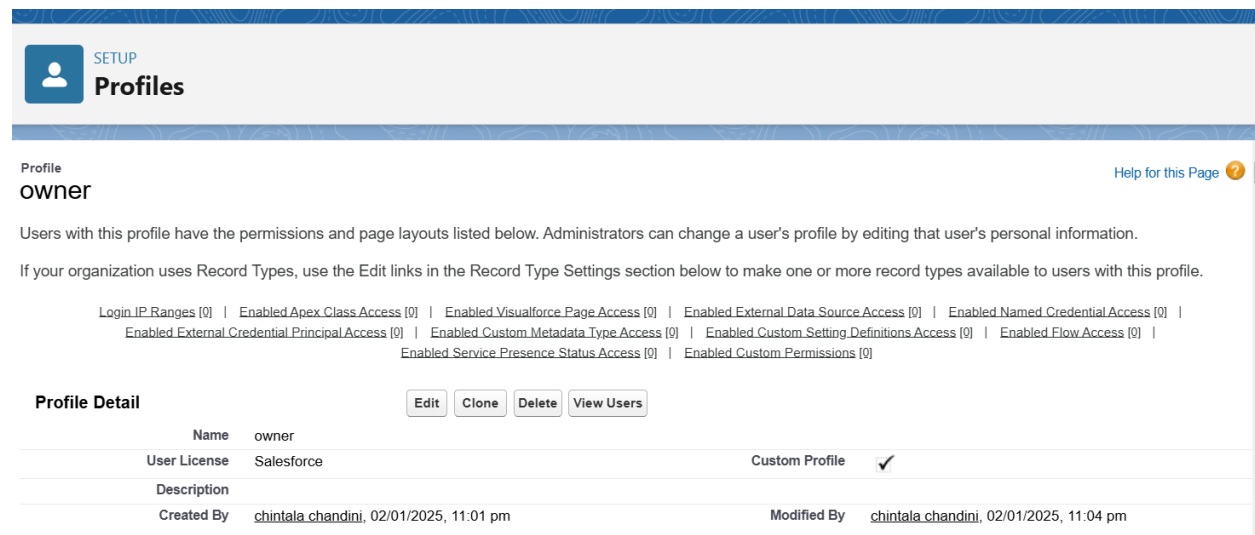
First name Sample Text

Activity 7 : PROFILES

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Owner 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.

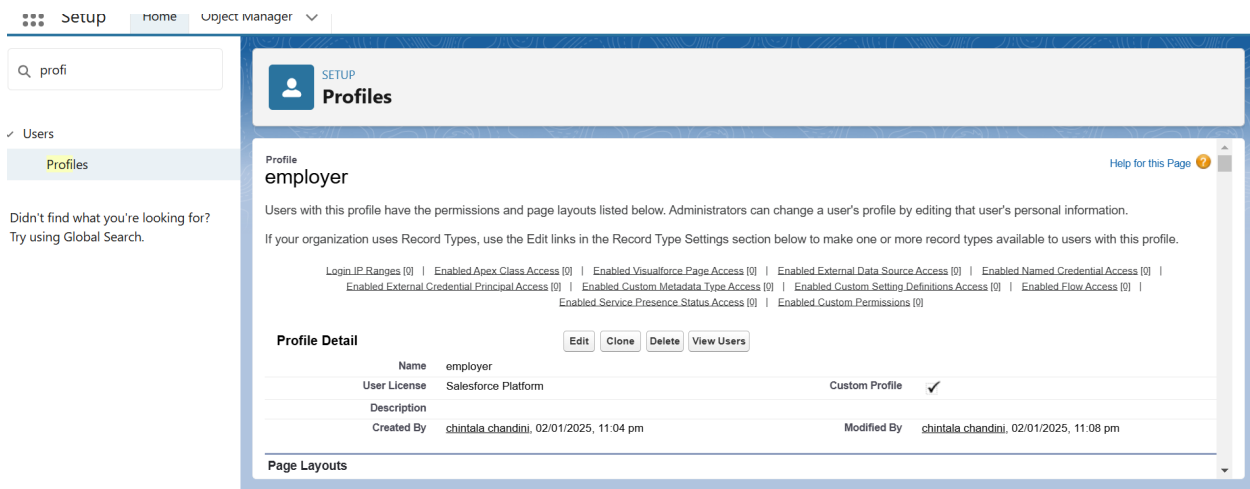


The screenshot shows the Salesforce Setup interface for the 'owner' profile. The page title is 'Profiles' under the 'SETUP' menu. The profile name is 'owner'. Below the name, there is a list of permissions and access settings, including Login IP Ranges, Apex Class Access, Visualforce Page Access, External 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 'Profile Detail' section shows the profile name 'owner', user license 'Salesforce', and a checked 'Custom Profile' checkbox. The 'Description' section shows the profile was created by 'chintala.chandini' on 02/01/2025 at 11:01 pm and modified by 'chintala.chandini' on 02/01/2025 at 11:04 pm.

Profile Detail		Buttons	
Name	owner	Edit	Clone
User License	Salesforce	Delete	View Users
Description			
Created By	chintala.chandini, 02/01/2025, 11:01 pm	Modified By	chintala.chandini, 02/01/2025, 11:04 pm

Employer Profile

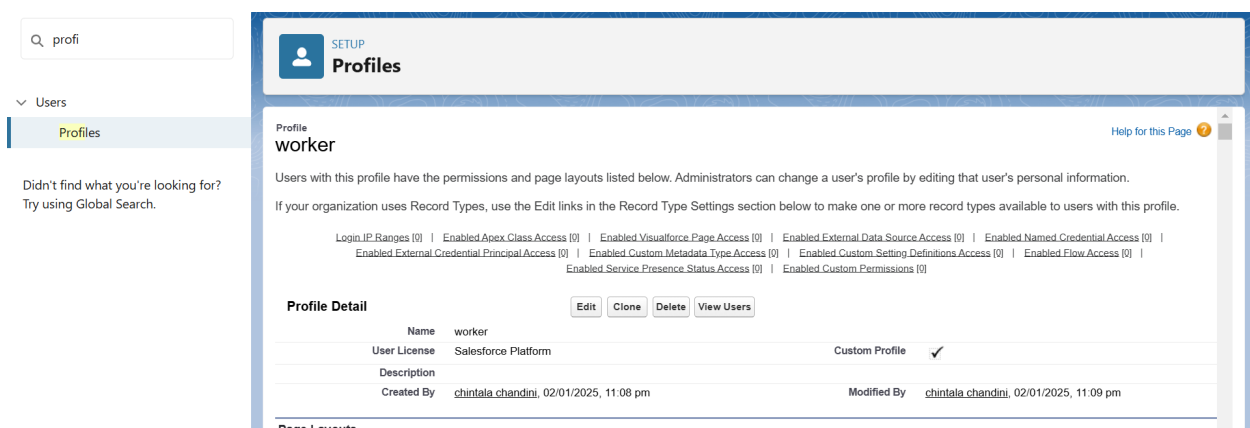
1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard Platform User) >> enter profile name (employer) >> Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the rice mill.
4. Scroll down to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



The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Profiles' is selected under the 'Users' section. The main content area displays the 'Profile: employer' page. It includes a search bar with 'profi' entered. Below the search bar, there's a 'Users' section with 'Profiles' highlighted. A message states: 'Didn't find what you're looking for? Try using Global Search.' The profile details section shows the profile name 'employer', user license 'Salesforce Platform', and a 'Custom Profile' checkbox checked. The 'Created By' field shows 'chintala.chandini, 02/01/2025, 11:04 pm' and the 'Modified By' field shows 'chintala.chandini, 02/01/2025, 11:08 pm'. The 'Page Layouts' section is partially visible at the bottom.

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.



The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Profiles' is selected under the 'Users' section. The main content area displays the 'Profile: worker' page. It includes a search bar with 'profi' entered. Below the search bar, there's a 'Users' section with 'Profiles' highlighted. A message states: 'Didn't find what you're looking for? Try using Global Search.' The profile details section shows the profile name 'worker', user license 'Salesforce Platform', and a 'Custom Profile' checkbox checked. The 'Created By' field shows 'chintala.chandini, 02/01/2025, 11:08 pm' and the 'Modified By' field shows 'chintala.chandini, 02/01/2025, 11:09 pm'. The 'Page Layouts' section is partially visible at the bottom.

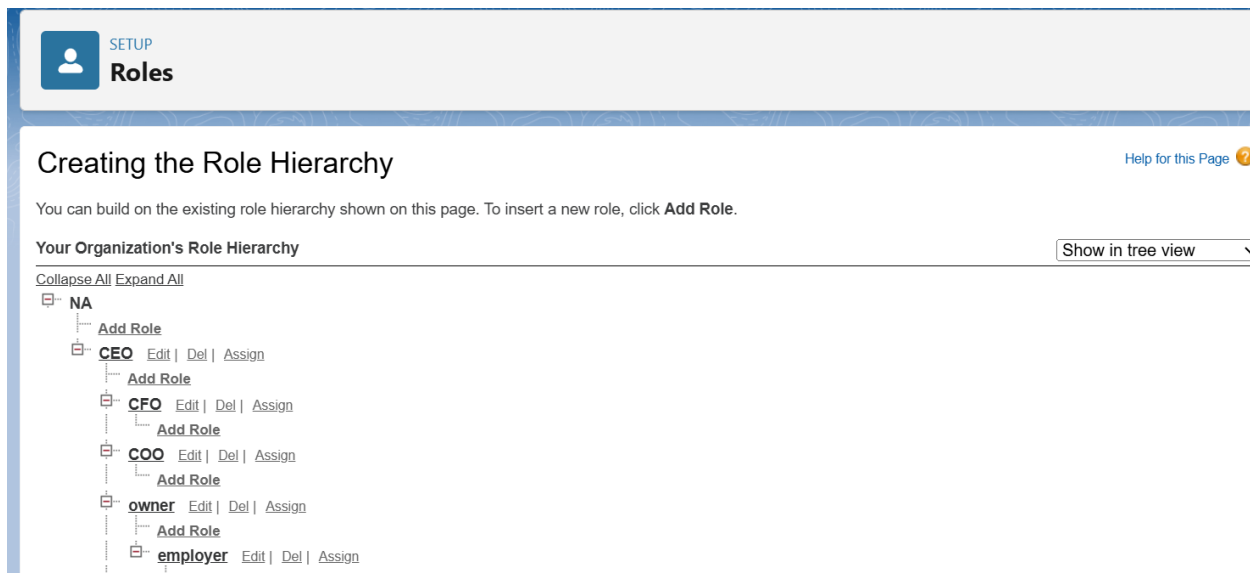
Activity 8 : Role & Role Hierarchy

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.

Creating employer roles

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.




The screenshot shows the Salesforce Setup Roles page. The header includes a user icon, the word "SETUP", and the title "Roles". Below the header, the page title is "Creating the Role Hierarchy" with a "Help for this Page" link. A message states: "You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**." Below this, the section "Your Organization's Role Hierarchy" is displayed. It includes links for "Collapse All" and "Expand All", and a "Show in tree view" button. The role hierarchy is shown as a tree structure:

- NA
 - Add Role
 - CEO (Edit | Del | Assign)
 - Add Role
 - CFO (Edit | Del | Assign)
 - Add Role
 - COO (Edit | Del | Assign)
 - Add Role
 - owner (Edit | Del | Assign)
 - Add Role
 - employer (Edit | Del | Assign)
 - Add Role

Activity 9 :User

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.


SETUP
Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users [Edit](#) [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

New User | Reset Password(s) | Add Multiple Users

<input type="checkbox"/>	Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit	chandini_chintala	cchan	prathyu@gvp.com		✓	System Administrator
<input type="checkbox"/>	Edit	Chatter Expert	Chatter	chatty.00day00000igs1bmax.qodri0nzim1p@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>	Edit	raj_raghu	rraj	banny@gvp.com	worker	✓	Standard Platform User
<input type="checkbox"/>	Edit	ram_ram	rram	panduu@gvp.com	employer	✓	Standard Platform User
<input type="checkbox"/>	Edit	User_Integration	integ	integration@00dqy00000igs1bmax.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User_Security	sec	insightsecurity@00dqy00000igs1bmax.com		✓	Analytics Cloud Security User
<input type="checkbox"/>	Edit	y_vicky	yy	siri@gvp.com	owner	✓	owner

New User | Reset Password(s) | Add Multiple Users

Activity 10 : Report

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.
5. 1.consumer name
2.rice type
3.rice price/kg
4.mode of payments
5.amount paid
6. Remove the unnecessary fields.
7. Select the fields that are mentioned below in the GROUP ROWS section.
8. Rice taken by shops
9. 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

Enable Field Editing

<input type="checkbox"/> Rice taken by shops	Consumer Name	rice price/kg	Rice type	Mode of payment	Amount Paid
<input type="checkbox"/> - (3)	chavakula minnu	50	1.basmati	UPI	0.00
	RAMU RAMU	50	1.basmati	Cash	0.00
	srimu srimu	30	2.normal rice	Net banking	0.00
Subtotal		80			0.00
<input type="checkbox"/> 20 (1)	chinatala chinni	50	1.basmati	UPI	1,000.00
Subtotal		50			1,000.00
<input type="checkbox"/> 30 (1)	chavakula pandu	30	2.normal rice	Net banking	900.00
Subtotal		30			900.00
<input type="checkbox"/> 40 (1)	chinatala prathyu	30	1.basmati	Credit card	1,200.00
Subtotal		30			1,200.00
Total (6)		80			3,100.00

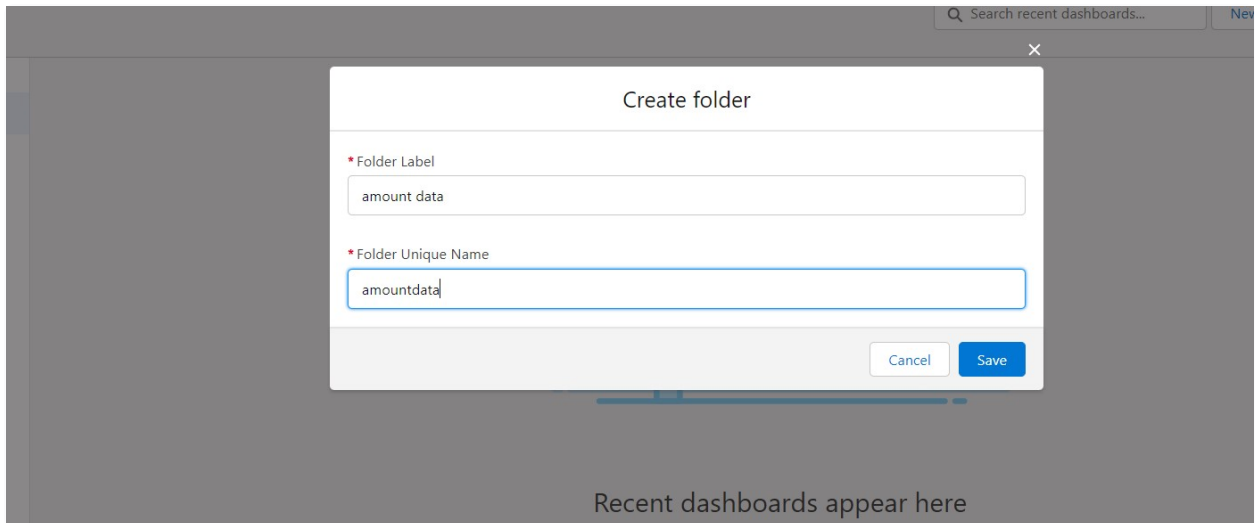
Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒

Activity 11 : Dashboards

1) Create Dashboard Folder

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.

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.



Search recent dashboards... New

Create folder

*Folder Label
amount data

*Folder Unique Name
amountdata

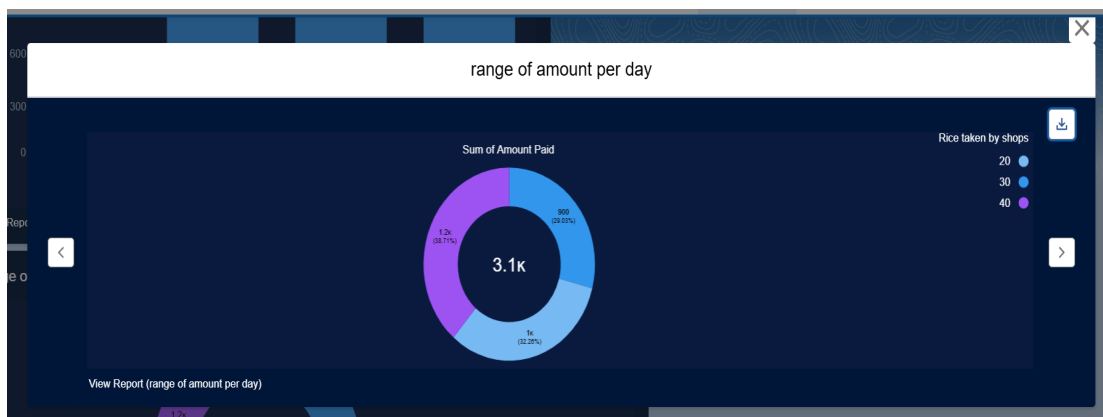
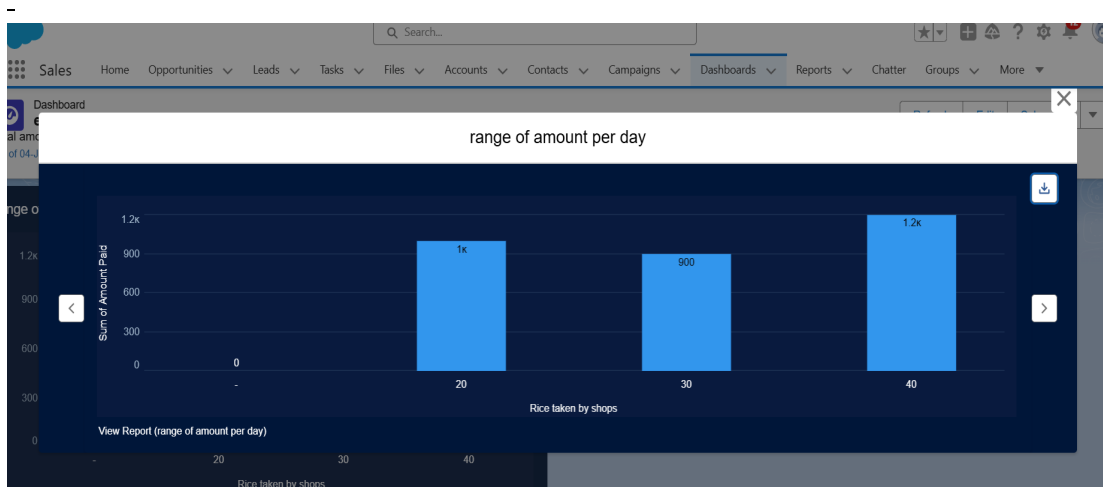
Cancel Save

Recent dashboards appear here

2) Create Dashboard

1. **Sales Process Automation:** Salesforce can automate sales workflows, reducing manual tasks.
2. **Customer Support:** Salesforce can provide tools to manage customer service cases and track resolutions.
3. **Data Analytics and Reporting:** Salesforce can generate detailed reports for business insights.

DASHBOARDS:



ACTIVITY-12

Creating an Apex Class(ConsumerRecord):

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

Code Snippet :

```
1. public class ConsumerRecord {
2.     public static void sendEmailNotification (List<consumer__c> con){
3.         for(consumer__c c:con)
4.         {
5.             Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
6.             email.setToAddresses( new List<String>{c.email__c});
7.             email.setSubject('Welcome to our company');
8.             email.setPlainTextBody('Dear ' + ' ' + ',\n\nWelcome to MY RICE!'+ 'You have been
seen as a valuable customer to us. PLease continue your journey with us, while we try to provide
you with good quality resources.' + '\n' +
9.                 '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' +
10.                 '+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'+
11.                 'Thankyou for buying ' + ' ' + 'Here are some of the products that are
brought by the customers who similarly bought products like this'+ '\n\n');
12.             Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
13.
14.         }
15.     }
16. }
```

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.

Syntax For creating trigger :

The syntax for creating trigger is :

```
Trigger [trigger name] on [object name]( Before/After event) {  
    //Trigger Logic  
}
```

Code Snippet :

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

Conclusion:

In this project, Salesforce streamlined operational processes by enabling automated data calculations, real-time reporting, and secure access control. Custom widgets provided visual insights into rice sales, production, and revenue, enhancing decision-making. Validation rules ensured data accuracy, while role-based access protected sensitive information. Rollup summaries and formulas reduced manual effort in calculations. Overall, Salesforce optimized business operations, contributing to improved productivity and planning.