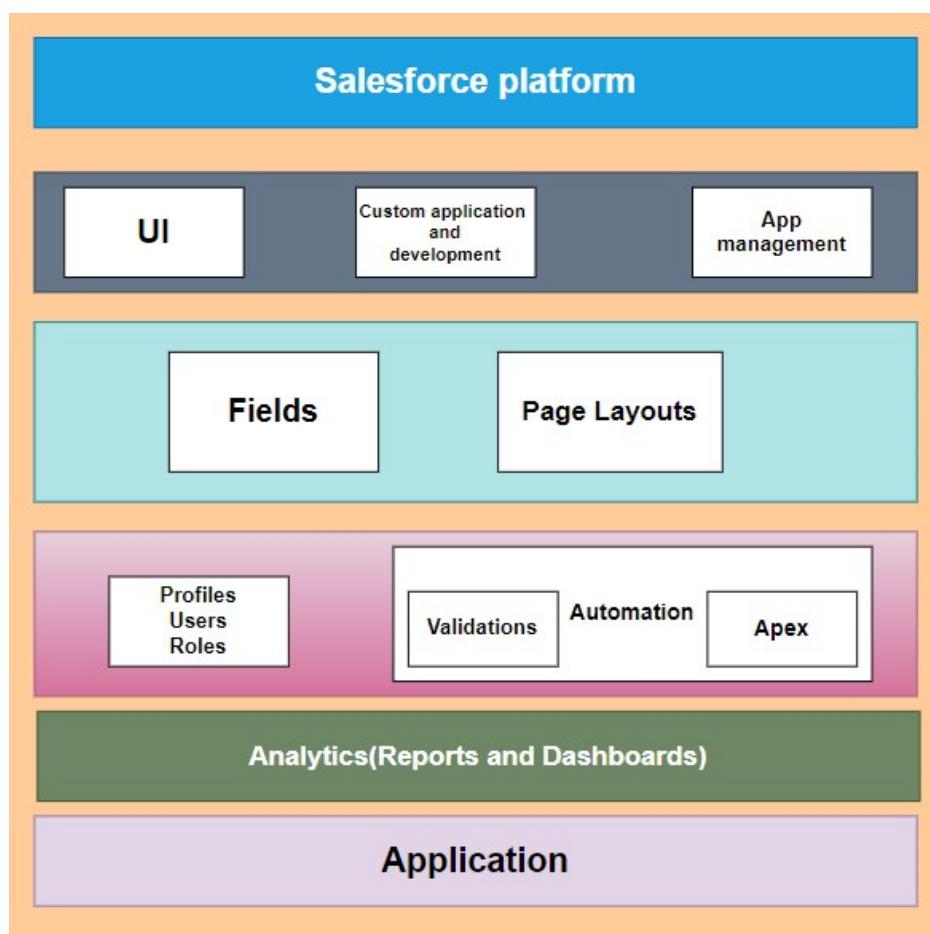


A CRM APPLICATION FOR WHOLESALE RICE MILL

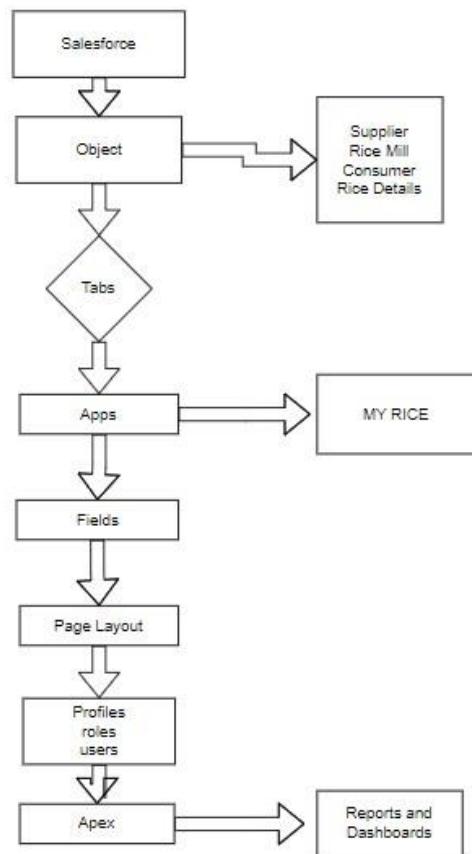
Introduction:

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.

Architecture:



Project Work Flow:



Features and Functionality:

Reporting 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.

A rollup 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.

A cross-object formula field: 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 rules: 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.

1.Introduction to salesforce

Salesforce is your customer success platform, designed to help you sell, service, market, analyse, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

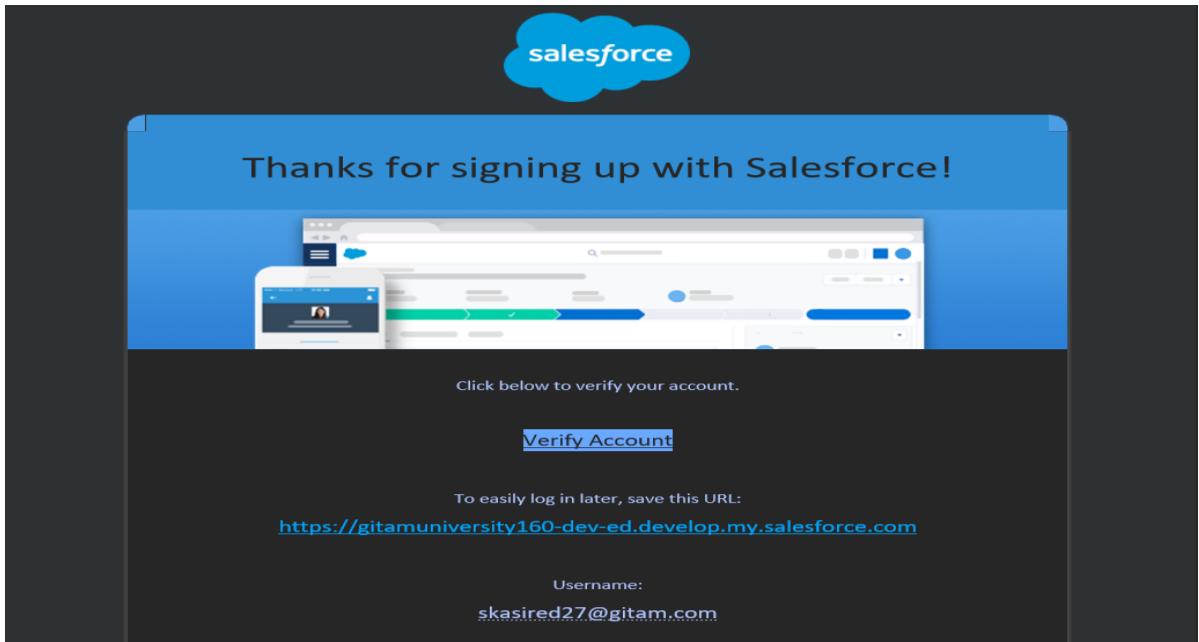
✓ Creating developer account

1. Go to <https://developer.salesforce.com/signup>
2. On the sign-up form, enter the following details:

The screenshot shows the sign-up page for the Salesforce Developer Edition. The left side of the page has a dark blue background with a white computer monitor icon displaying a complex interface. Below the icon, the text "Build enterprise-quality apps fast to bring your ideas to life" is displayed, followed by a bulleted list of features: "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". The right side of the page has a white background with a title "Sign up for your Salesforce Developer Edition" and a subtitle "A full-featured copy of the Platform, for free". Below this, there is a note: "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." The form itself contains several input fields: "First Name*" with "Kasireddy" entered, "Last Name*" with "Sree Lakshmi" entered, "Email*" with "skasireddy@gitam.in" entered, "Role*" with "Developer" selected, "Company*" with "Company Name" entered, "Country/Region*" with "India" selected, and "State/Province*" with "Karnataka" selected.

✓ 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.



2. Object

Salesforce objects are database tables that permit you to store data that is specific to an organization

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. They are the heart of any application and provide a structure for sharing data.

To Create an Object:

1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
2. On Custom object defining page:
3. Enter the label name, plural label name, click on Allow reports, Allow search.
4. Click Save.

✓ Create Supplier Object

The screenshot shows the Salesforce Object Manager interface. At the top, there is a search bar with the placeholder "Search Setup". Below the search bar, the navigation bar includes "Setup", "Home", and "Object Manager". On the right side of the header, there are several icons: a star, a plus sign, a question mark, a gear, a bell with a number "12", and a user profile icon.

The main area is titled "Object Manager" with a "SETUP" button. It displays a table with one item: "supplier". The table has columns: "LABEL", "API NAME", "TYPE", "DESCRIPTION", "LAST MODIFIED", and "DEPLOYED". The "supplier" entry has the following details:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
supplier	supplier__c	Custom Object		24/06/2024	✓

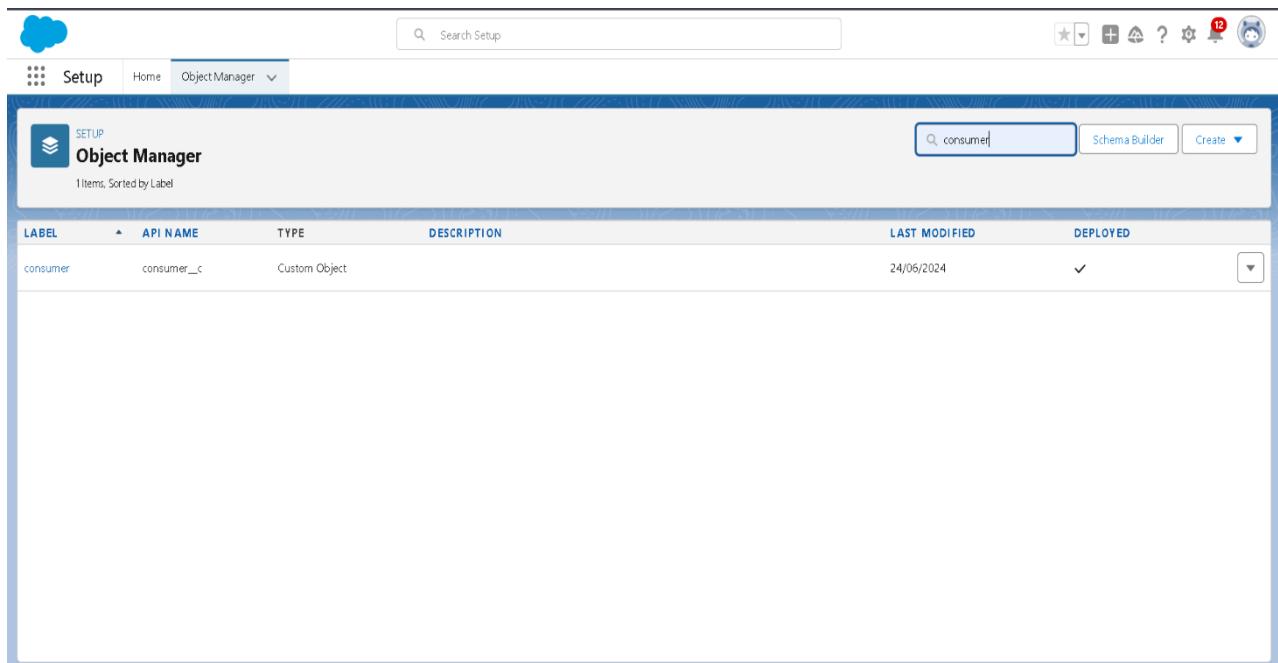
✓ Create Rice Mill Object

The screenshot shows the Salesforce Object Manager interface. At the top, there is a search bar with the placeholder "Search Setup". Below the search bar, the navigation bar includes "Setup", "Home", and "Object Manager". On the right side of the header, there are several icons: a star, a plus sign, a question mark, a gear, a bell with a number "12", and a user profile icon.

The main area is titled "Object Manager" with a "SETUP" button. It displays a table with one item: "rice mill". The table has columns: "LABEL", "API NAME", "TYPE", "DESCRIPTION", "LAST MODIFIED", and "DEPLOYED". The "rice mill" entry has the following details:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
rice mill	rice_mill__c	Custom Object		24/06/2024	✓

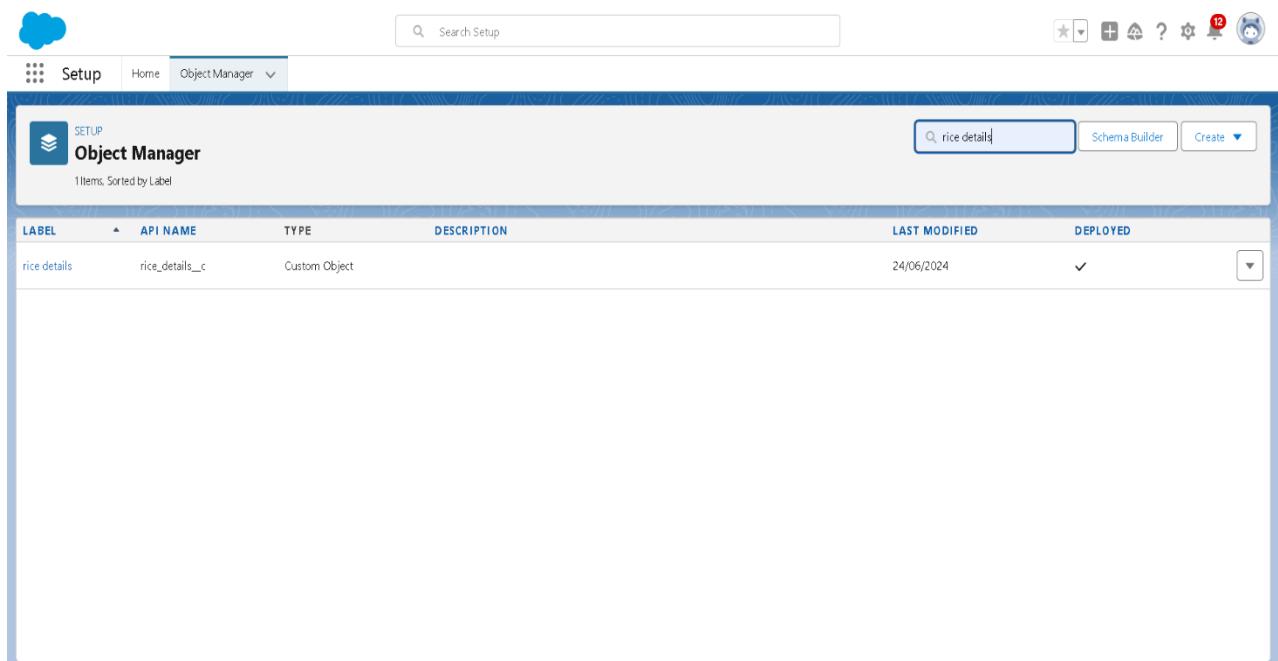
✓ Create Consumer Object



The screenshot shows the Salesforce Object Manager interface. The search bar at the top contains 'consumer'. A table below lists one object:

Label	API Name	Type	Description	Last Modified	Deployed
consumer	consumer_c	Custom Object		24/06/2024	✓

✓ Create Rice Details Object



The screenshot shows the Salesforce Object Manager interface. The search bar at the top contains 'rice details'. A table below lists one object:

Label	API Name	Type	Description	Last Modified	Deployed
rice details	rice_details_c	Custom Object		24/06/2024	✓

3. Tabs

A tab is like a user interface that is used to build records for objects and to view the records in the objects.

✓ Creating A Custom Tab and Remaining 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.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The 'Custom Object Tabs' section lists four tabs:

Action	Label	Tab Style	Description
Edit Del	consumers	Shopping Cart	
Edit Del	rice details	Shopping Cart	
Edit Del	rice mills	Bell	
Edit Del	supplier	Truck	

4. 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 colour and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

✓ 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 Items:
Select the items (supplier, rice mill, consumer, Rice details) from the search bar and move it using the arrow button → Next.
5. To Add User Profiles:

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

The screenshot shows the Salesforce Lightning Experience App Manager interface. The top navigation bar includes 'Setup' (selected), 'Home', 'Object Manager', and a search bar. On the left, there's a sidebar with 'Apps' and 'App Manager' selected. A global search bar at the top left contains the text 'app manag'. The main content area is titled 'Lightning Experience App Manager' and displays a table of 23 installed apps. The columns are: App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. The table lists various standard and custom apps like Digital Experiences, Lightning Usage App, Marketing CRM Classic, MY RICE, Platform, Queue Management, Sales, Sales Console, Sales Chatter, Salesforce Scheduler Setup, and Service.

App Name	Developer Name	Description	Last Modified Date	App Type	Visibility
8 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	24/06/2024, 9:40 am	Lightning	✓
9 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	24/06/2024, 9:40 am	Lightning	✓
10 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	24/06/2024, 9:40 am	Classic	✓
11 MY RICE	MY_RICE		24/06/2024, 11:32 am	Lightning	✓
12 Platform	Platform	The fundamental Lightning Platform	24/06/2024, 9:40 am	Classic	✓
13 Queue Management	QueueManagement	Create and manage queues for your business.	24/06/2024, 9:40 am	Lightning	✓
14 rice mill	rice_mill		24/06/2024, 8:15 pm	Lightning	✓
15 Sales	Sales	The world's most popular sales force automation (SFA) solution	24/06/2024, 9:40 am	Classic	✓
16 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	24/06/2024, 9:40 am	Lightning	✓
17 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one...	24/06/2024, 9:40 am	Lightning	✓
18 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	24/06/2024, 9:40 am	Classic	✓
19 Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	24/06/2024, 9:42 am	Lightning	✓
20 Service	Service	Manage customer service with accounts, contacts, cases, and more	24/06/2024, 9:40 am	Classic	✓

Lightning App Builder | App Settings | Pages | MY RICE | ? Help

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:  Primary Color Hex Value: #0070D2

Clear

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

App Launcher Preview



Lightning App Builder | App Settings | Pages | MY RICE | ? Help

App Options

Navigation and Form Factor

- * Navigation Style: Standard navigation (selected)
- Console navigation

Supported Form Factors

- Desktop and phone (selected)
- Desktop
- Phone

Setup and Personalization

Setup Experience

- Setup (full set of Setup options)
- Service Setup

App Personalization Settings

- Disable end user personalization of nav items in this app
- Disable temporary tabs for items outside of this app
- Use Omni-Channel sidebar

Lightning App Builder | App Settings | Pages | MY RICE | ? Help

Navigation Items

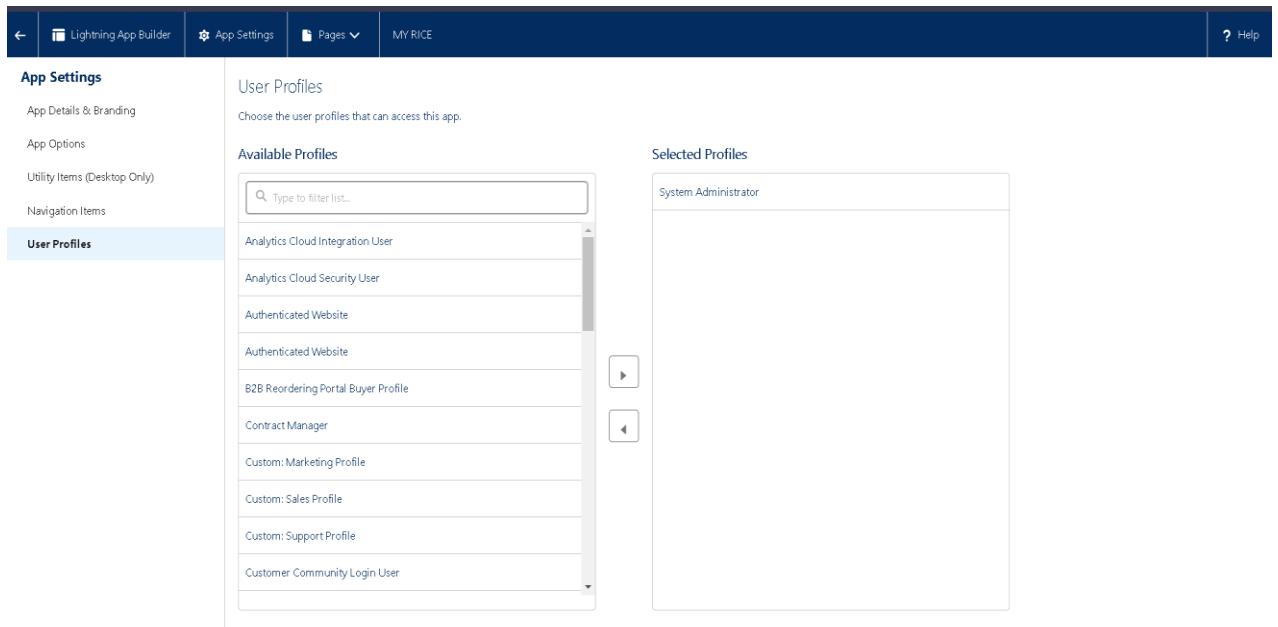
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from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

Available Items

<input type="checkbox"/>	Type to filter list...	<input type="button" value="C"/> <input type="button" value="Create"/>
	Accounts	<input type="button" value="▼"/>
	All Sites	<input type="button" value="▼"/>
	Alternative Payment Methods	<input type="button" value="▼"/>
	Analytics	<input type="button" value="▼"/>
	App Launcher	<input type="button" value="▼"/>
	Appointment Categories	<input type="button" value="▼"/>
	Appointment Invitations	<input type="button" value="▼"/>
	Approval Requests	<input type="button" value="▼"/>
	Asset Action Sources	<input type="button" value="▼"/>
	Asset Actions	<input type="button" value="▼"/>

Selected Items

	supplier	<input type="button" value="▲"/>
	rice mills	<input type="button" value="▼"/>
	consumers	<input type="button" value="▲"/>
	rice details	<input type="button" value="▼"/>



5. Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

✓ Creating The Number Fields 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.

rice details

Fields & Relationships
8 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)		
rice details Name	Name	Auto Number		✓
rice distributed	rice_distributed_c	Number(5, 0)		▼
rice mill1	rice_mill1_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_Name_c	Master-Detail(supplier)		✓

rice details Custom Field
rice distributed

[Validation Rules \[0\]](#)

[Help for this Page ⓘ](#)

Custom Field Definition Detail

Edit	Set Field-Level Security	View Field Accessibility	Where is this used?
----------------------	--	--	-------------------------------------

Field Information

Field Label	rice distributed	Object Name	rice_details
Field Name	rice_distributed	Data Type	Number
API Name	rice_distributed_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By [Kasireddy Sree Lakshmi](#) | 24/06/2024, 11:38 am Modified By [Kasireddy Sree Lakshmi](#) | 27/06/2024, 1:15 pm

General Options

Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
AI Prediction	<input type="checkbox"/>

✓ Creating The 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.

rice details Custom Field
supplier Name

Custom Field Definition Detail

Field Label	supplier Name	Object Name	rice_details
Field Name	supplier_Name	Data Type	Master-Detail
API Name	supplier_Name_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By: Kasireddy Sree Lakshmi, 24/06/2024, 11:42 am Modified By: Kasireddy Sree Lakshmi, 24/06/2024, 11:42 am

Master-Detail Options

Related To	supplier	Child Relationship Name	rice_details
Related List Label	rice details		
Sharing Setting	ReadWrite: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		
Reparentable Master Detail	<input type="checkbox"/>		

rice details Custom Field
rice mill1

Custom Field Definition Detail

Field Label	rice mill1	Object Name	rice_details
Field Name	rice_mill1	Data Type	Master-Detail
API Name	rice_mill1_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By: Kasireddy Sree Lakshmi, 24/06/2024, 11:44 am Modified By: Kasireddy Sree Lakshmi, 24/06/2024, 11:44 am

Master-Detail Options

Related To	rice mill	Child Relationship Name	rice_details
Related List Label	rice details		
Sharing Setting	ReadWrite: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		
Reparentable Master Detail	<input type="checkbox"/>		

✓ 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.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main area displays the 'consumer' object details. On the left, a sidebar lists various customization options like Page Layouts, Lightning Record Pages, Buttons, etc. The central panel shows a custom field named 'rice mill name' with its details: Field Label: 'rice mill name', Field Name: 'rice_mill_name', API Name: 'rice_mill_name_c'. It also shows the object name as 'consumer' and data type as 'Master-Detail'. Under 'Master-Detail Options', it's set to relate to 'rice_mill' with a child relationship name 'consumers'. The bottom of the screen shows the standard Salesforce footer.

✓ Creating A 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 creating a custom field. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER consumer'. On the left, a sidebar lists 'Fields & Relationships' and other layout-related sections. The central area displays the 'Custom Field Definition Detail' for a field named 'rice taken by shops in kgs'. The field is defined as a 'Number' type with a length of 5. It has a description 'rice taken by shops in kgs' and is categorized under 'rice details'. The 'Field Layouts' section on the left shows various layout options like Page Layouts, Lightning Record Pages, and Compact Layouts.

✓ Creating Fields in 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 “master detail” 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.

✓ 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”

✓ Creating Fields in Consumer Objects

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected for the 'consumer' object. The 'Fields & Relationships' tab is active. The table below lists the fields:

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)		
Mode of payment	Mode_of_payment__c	Picklist		

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

13. click “Check Syntax” and save.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes a cloud icon, 'Setup', 'Home', and 'Object Manager'. A search bar says 'Search Setup'. On the right are various icons for navigation and help. The main area shows 'SETUP > OBJECT MANAGER consumer'. On the left, a sidebar lists options like 'Details', 'Fields & Relationships' (which is selected), 'Page Layouts', 'Lightning Record Pages', etc. The right panel displays 'consumer Custom Field Amount Paid'. It has tabs for 'Custom Field Definition Detail' (selected) and 'Formula Options'. Under 'Custom Field Definition Detail', fields include 'Field Label' (Amount Paid), 'Field Name' (Amount_Paid), 'API Name' (Amount_Paid_c), 'Description', 'Help Text', 'Data Owner', 'Field Usage', 'Data Sensitivity Level', 'Compliance Categorization', 'Created By' (Kasireddy Sree Lakshmi), and 'Modified By' (Kasireddy Sree Lakshmi). Under 'Formula Options', it shows 'Data Type' (Formula), 'Decimal Places' (2), and the formula 'Rice_taken_by_shops_c * rice_mill_name_rrice_price_kg_c'. At the bottom right is a 'Help for this Page' link.

This screenshot shows the continuation of the custom field creation process. The setup interface is identical to the previous one, with the 'Fields & Relationships' tab selected. The right panel now displays 'consumer Custom Field Consumer Name'. The 'Custom Field Definition Detail' section shows 'Field Label' (Consumer Name), 'Field Name' (Consumer_Name), 'API Name' (Consumer_Name_c), 'Description', 'Help Text', 'Data Owner', 'Field Usage', 'Data Sensitivity Level', 'Compliance Categorization', 'Created By' (Kasireddy Sree Lakshmi), and 'Modified By' (Kasireddy Sree Lakshmi). In the 'Formula Options' section, the 'Data Type' is set to 'Formula' and the formula is 'First_name_c + '' + Last_name_c'. The 'Help for this Page' link is also present at the bottom right.

✓ 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.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main content area is titled 'SETUP > OBJECT MANAGER consumer'. On the left, a sidebar lists various configuration options like 'Buttons, Links, and Actions', 'Field Sets', 'Object Limits', etc., with 'Validation Rules' selected. The right pane displays the 'Validation Rule Detail' for 'consumer Validation Rule'. The rule details are as follows:

Field	Value
Rule Name	Phonenumberoremailblankrule
Error Condition Formula	OR(ISBLANK(Phone_number__c), ISBLANK(email__c))
Error Message	please fill in your phone number.
Description	phone number and email number should not be blank
Created By	Kasireddy,Sree Lakshmi, 24/06/2024, 12:54 pm
Active	✓
Error Location	Top of Page
Modified By	Kasireddy,Sree Lakshmi, 24/06/2024, 12:54 pm

6. Page Layouts

✓ Creating The 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
 - 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.

consumer Layout

Fields

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

consumer Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher

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

consumer Layout

Fields

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

consumer Name: GEN-2004-001234

rice mill name: Sample Text

rice taken by shops in kgs: 72,374

First name: Sample Text

Last name: Sample Text

Phone number: 1-415-555-1212

email: sarah.sample@company.com

Rice taken by shops: 24,590

Rice type: Sample Text

Mode of payment: Sample Text

Amount Paid: 212.94

Consumer Name: Sample Text

System Information (Header visible on edit only)

Created By: Sample Text

Last Modified By: Sample Text

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.
3. Give access and save it.

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

- Setup Tab:** The top navigation bar includes the Setup tab, Home, and Object Manager.
- Search Bar:** A search bar at the top right is set to "Search Setup".
- Profile List:** The main area displays a list of profiles under the "Profiles" category. The "owner" profile is selected, indicated by a yellow highlight.
- Profile Detail:** The "Profile Detail" section shows:
 - Name:** owner
 - User License:** Salesforce
 - Description:** (empty)
 - Created By:** Kasireddy Sree Lakshmi, 24/06/2024, 7:27 pm
 - Modified By:** Kasireddy Sree Lakshmi, 27/06/2024, 9:02 am
- Custom Profile:** A checked checkbox indicates this is a custom profile.
- Page Layouts:** The "Page Layouts" section lists standard object layouts for Global, Location Group Assignment, Macro, Object Milestone, and Operating Hours. Examples include Global Layout for Account and Macro Layout for Email Application.

The screenshot shows the Salesforce Setup interface under the Profiles section. On the left, there's a search bar and a sidebar with 'Profiles' selected. The main area shows a grid of objects with checkboxes indicating permissions. Below this is a table for 'Custom Object Permissions' with rows for 'consumers', 'Receipt details', and 'rice details'. At the bottom, there are 'Session Settings' and 'Password Policies' sections.

✓ 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
5. And click save.

The screenshot shows the 'employer' profile edit screen. It includes sections for 'Profile Detail' (Name, User License, Description, Created By, Modified By), 'Page Layouts' (Standard Object Layouts like Global, Email Application, Home Page Layout, Account, Lead, Location, Location Group, Location Group Assignment), and links for Record Types and Custom Settings.

The screenshot shows the Salesforce Setup interface under the Profiles section. It includes a search bar at the top and navigation links for Home and Object Manager. On the left, there's a sidebar with a search field and a 'Profiles' link. The main content area has a title 'SETUP Profiles'. It contains several tables and sections:

- Communication Subscription Consents**: A grid of checkboxes for various consent types across different categories.
- Locations**: A grid of checkboxes for locations.
- Party Consents**: A grid of checkboxes for party consents.
- Push Topics**: A grid of checkboxes for push topics.
- Sellers**: A grid of checkboxes for sellers.
- Streaming Channels**: A grid of checkboxes for streaming channels.
- User External Credentials**: A grid of checkboxes for user external credentials.
- Custom Object Permissions**: Two tables showing permissions for 'consumers', 'Receipt details', 'rice details' and 'rice mills', 'supplier' objects across basic access and data administration actions.
- Session Settings**: Shows session times out after 2 hours of inactivity and session security level required at login.
- Password Policies**: Shows user passwords expire in 90 days.

✓ 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
5. And click save.

The screenshot shows the Salesforce Setup interface under the Profiles section for the 'worker' profile. It includes a search bar at the top and navigation links for Home and Object Manager. On the left, there's a sidebar with a search field and a 'Profiles' link. The main content area has a title 'SETUP Profiles' and a sub-section 'Profile worker'. It contains the following information:

- Profile Detail**: Shows the profile name 'worker', user license 'Salesforce Platform', and a 'Custom Profile' checkbox which is checked.
- Page Layouts**: Shows standard object layouts for Global, Lead, Location, Location Group, and Location Group Assignment.
- Standard Object Layouts**: Shows layout assignments for Global, Email Application, Home Page Layout, and Account objects.

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

- Left Sidebar:** Includes a search bar ("Search Setup"), navigation tabs ("Setup", "Home", "Object Manager"), and a global search bar ("Q_ profiles").
- Header:** Shows the "SETUP" icon and the title "Profiles".
- Content Area:**
 - Object Permissions:** A grid showing permissions for Contacts, Contact Point Addresses, Contact Point Consents, Contact Point Emails, Push Topics, Sellers, Streaming Channels, and User External Credentials.
 - Custom Object Permissions:** Two tables showing permissions for "consumers", "Receipt details", "rice details", "rice mills", and "supplier" across Basic Access and Data Administration categories.
 - Session Settings:** Set to "Session Times Out After 2 hours of inactivity" and "Session Security Level Required at Login".
 - Password Policies:** Set to "User passwords expire in 90 days", "Enforce password history 3 passwords remembered", "Minimum password length 8", and "Password complexity requirement Must include alpha and numeric characters".

8. Role and 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

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

Creating the Role Hierarchy

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

Your Organization's Role Hierarchy

- Gitam University
 - CEO** Edit | Del | Assign
 - CFO** Edit | Del | Assign
 - COO** Edit | Del | Assign
 - owner** Edit | Del | Assign
 - employer** Edit | Del | Assign
 - worker** Edit | Del | Assign
 - SVP_Customer Service & Support** Edit | Del | Assign
 - SVP_Human Resources** Edit | Del | Assign

Role
Owner

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

Hierarchy: Gitam University > CEO > owner
Siblings: SVP_Sales & Marketing, SVP_Customer Service & Support, CFO, SVP_Human Resources, COO

Role Detail	Label	Owner	Role Name	Owner
This role reports to	CEO		Role Name as displayed on reports	
Modified By	Kasireddy,Sree Lakshmi	24/06/2024, 9:06 pm	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities			
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases			

Users in owner Role

Assign Users to Role | New User

No records to display

✓ Creating Employer Role

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 interface under the 'Roles' section. On the left sidebar, 'roles' is selected under 'Users'. The main content area displays the 'Role employer' details. The 'Label' field is set to 'employer'. The 'Role Name as displayed on reports' field is also 'employer'. The 'Sharing Groups' field is set to 'Role, Role and Internal Subordinates'. The 'Role Detail' table shows the following access levels:

	Label	Role Name
This role reports to	owner	Role Name as displayed on reports
Modified By	Kasireddy Sree Lakshmi, 24/06/2024, 9:07 pm	Sharing Groups
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities	Role, Role and Internal Subordinates
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases	

Below the table, there is a section titled 'Users in employer Role' with a button 'Assign Users to Role' and a link 'New User'. A note says 'No records to display'.

The screenshot shows the Salesforce Setup interface under the 'Roles' section. On the left sidebar, 'roles' is selected under 'Users'. The main content area displays the 'Role worker' details. The 'Label' field is set to 'worker'. The 'Role Name as displayed on reports' field is also 'worker'. The 'Sharing Groups' field is set to 'Role, Role and Internal Subordinates'. The 'Role Detail' table shows the following access levels:

	Label	Role Name
This role reports to	employer	Role Name as displayed on reports
Modified By	Kasireddy Sree Lakshmi, 24/06/2024, 9:09 pm	Sharing Groups
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities	Role, Role and Internal Subordinates
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases	

Below the table, there is a section titled 'Users in worker Role' with a button 'Assign Users to Role' and a link 'New User'. A note says 'No records to display'.

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 Users

1. Go to setup >> type users in quick find box >> select users >> click new user.
2. Fill the fields: (First name, Last name, Email id, Username, Nick name, Role).
3. Click on save.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The left sidebar includes links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and a search bar for 'users'. The main content area is titled 'All Users' and displays a table of existing users. The table columns are Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty000dm000005gp4suae5eangnvojic@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	raj_raju	raj	sreelakshmi@gmail.com		<input checked="" type="checkbox"/>	Force.com - App Subscription User
<input type="checkbox"/>	ram_ram	ram	sreelakshmi@gmail.com		<input checked="" type="checkbox"/>	Cross Org Data Proxy User
<input type="checkbox"/>	Sree Lakshmi_Kasireddy	kSree	skasire27@gtan.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User_Integration	integ	integration@000dm000005gp4suae.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@000dm000005gp4suae.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>	y_vicky	Y	sreelakshmi7@gmail.com		<input checked="" type="checkbox"/>	Cross Org Data Proxy User

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main content area displays the 'User Detail' page for a user named 'vicky'. The user's name is listed as 'vicky' with an alias 'vy'. The email address is 'sreelakshmi6667@gmail.com' (verified). The user is active and assigned to the 'Cross Org Data Proxy' profile. Other details include company ('Gitam University'), department ('Marketing'), and various role checkboxes like 'Cross Org Data Proxy User', 'Marketing User', etc.

✓ Creating Another Users

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main content area displays the 'User Detail' page for a user named 'ram'. The user's name is listed as 'ram' with an alias 'ram'. The email address is 'sreelakshmi6667@gmail.com' (verified). The user is active and assigned to the 'Cross Org Data Proxy' profile. Other details include company ('Gitam University'), department ('Marketing'), and various role checkboxes like 'Cross Org Data Proxy User', 'Marketing User', etc.

User Detail

	Name	ragu raj	Role
Alias	rraj	User License	Force.com - App Subscription
Email	sreelakshmi6667@gmail.com Verify	Profile	Force.com - App Subscription User
Username	sreelakshmi9@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User9	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	Gitam University	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	D No 4-26, Jangalapalli, Pedacheripalli, Marella, Prakasam Andhra Pradesh - 523117 Bangalore 561203 Karnataka India	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View

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 Settings

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

The screenshot shows the Salesforce Setup interface under the Sharing Settings section. The main area lists sharing rules for various objects:

Object	Default sharing	Specific sharing
Work Plan	Private	Private
Work Plan Template	Private	Private
Work Step Template	Private	Private
Work Type	Private	Private
Work Type Group	Public Read/Write	Private
consumer	Controlled by Parent	Controlled by Parent
Receipt details	Controlled by Parent	Controlled by Parent
rice details	Controlled by Parent	Controlled by Parent
rice mill	Public Read Only	Private
supplier	Public Read Only	Private

Other Settings

- Manager Groups: ⓘ
- Secure guest user record access: ⓘ
- Require permission to view record names in lookup fields: ⓘ

Sharing Rules

Lead Sharing Rules: New | Recalculate | Lead Sharing Rules Help ⓘ

No sharing rules specified.

11. 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. In Salesforce.com we can easily generate reports in different styles. And can create reports in a very short time and also schedule the reports. Salesforce provides a powerful suit of analytic tools to help you organize, view and analyse your data.

✓ Create Reports

1. Go to the app >>click on the reports tab
2. Click New Report.
3. 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
4. Remove the unnecessary fields.
5. Select the fields that are mentioned below in the GROUP ROWS section.
 - Rice taken by shops.
6. Click save and run and save the report as “range of amount per day”. And save it.

The screenshot shows the MY RICE application interface. At the top, there is a navigation bar with links for supplier, rice mills, consumers, rice details, Dashboards, Reports, and other sections. Below the navigation bar is a search bar labeled "Search...". On the left, there is a sidebar with categories: Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), Folders (All Folders, Created by Me, Shared with Me), and Favorites (All Favorites). The main area displays a table titled "RECENT" with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. One item is listed: "range of amount per day" (estimated rice per day) created by Kasireddy Sree Lakshmi on 26/6/2024, 9:59 pm.

The screenshot shows the MY RICE application interface with a modal dialog titled "Create Report". The dialog has a sidebar on the left with categories: Recently Used, All (Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, Price Books, Products and Assets), and a search bar at the top right. The main area is titled "Select a Report Type" and shows a search result for "rice mills with consumers". The result table has columns: Report Type Name and Category. One entry is shown: "rice mills with consumers" under the Standard category.

✓ Sharing Report to Owner

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

Report rice mills with consumers
range of amount per day

Total Records	Total rice price/kg	Total Amount Paid			
10	391	11,993.00			
<input type="checkbox"/> Rice taken by shops ↑ ↓					
	Consumer Name	Rice type			
		rice price/kg			
		Mode of payment			
		Amount Paid			
<input type="checkbox"/> 1 (1)	Ravi anuma	2:normal rice	96	Credit card	96.00
Subtotal			96		96.00
<input type="checkbox"/> 2 (1)	Anu kabam	2:normal rice	96	UPI	192.00
Subtotal			96		192.00
<input type="checkbox"/> 3 (1)	Subha roy	2:normal rice	77	Net banking	231.00
Subtotal			77		231.00
<input type="checkbox"/> 4 (1)	Adhi reddy	1:basmati	77	Cash	308.00
Subtotal			77		308.00
<input type="checkbox"/> 5 (1)	Anju maya	1:basmati	77	Net banking	385.00
Subtotal			77		385.00
<input type="checkbox"/> 7 (1)	Praveena annagi	2:normal rice	53	Cash	371.00
Subtotal			53		371.00
Row Counts <input checked="" type="checkbox"/> Detail Rows <input checked="" type="checkbox"/> Subtotals <input checked="" type="checkbox"/> Grand Total <input checked="" type="checkbox"/>					

Report rice mills with consumers
range of amount per day

<input type="checkbox"/> Rice taken by shops ↑ ↓	Consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
Subtotal			77		308.00
<input type="checkbox"/> 5 (1)	Anju maya	1:basmati	77	Net banking	385.00
Subtotal			77		385.00
<input type="checkbox"/> 7 (1)	Praveena annagi	2:normal rice	53	Cash	371.00
Subtotal			53		371.00
<input type="checkbox"/> 20 (1)	Mala reddy	1:basmati	96	Net banking	1,920.00
Subtotal			96		1,920.00
<input type="checkbox"/> 25 (1)	Roopa P	2:normal rice	60	UPI	1,500.00
Subtotal			60		1,500.00
<input type="checkbox"/> 30 (1)	Riya ravi	1:basmati	105	Credit card	3,150.00
Subtotal			105		3,150.00
<input type="checkbox"/> 40 (1)	Rishi T L	2:normal rice	96	Cash	3,840.00
Subtotal			96		3,840.00
Total (10)			391		11,993.00
Row Counts <input checked="" type="checkbox"/> Detail Rows <input checked="" type="checkbox"/> Subtotals <input checked="" type="checkbox"/> Grand Total <input checked="" type="checkbox"/>					

✓ 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. navigate to app launcher and click reports on that.

5. click all reports.
6. Select the range of amount per day drop down in that click move.
7. Select estimated rice per day folder and select folder.

REPORTS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	Einstein Bot Reports	Automated Process	24/6/2024, 9:40 am	Automated Process	24/6/2024, 9:40 am
Created by Me	Einstein Bot Reports Spring '23	Automated Process	24/6/2024, 9:40 am	Automated Process	24/6/2024, 9:40 am
Private Reports	Einstein Bot Reports Summer '23	Automated Process	24/6/2024, 9:40 am	Automated Process	24/6/2024, 9:40 am
Public Reports	Einstein Bot Reports Summer '22	Automated Process	24/6/2024, 9:40 am	Automated Process	24/6/2024, 9:40 am
All Reports	Einstein Bot Reports Winter '23	Automated Process	24/6/2024, 9:40 am	Automated Process	24/6/2024, 9:40 am
FOLDERS	Enablement Dashboard Reports Spring '24	Automated Process	24/6/2024, 9:40 am	Automated Process	24/6/2024, 9:40 am
All Folders	Enablement Dashboard Reports Summer '24	Automated Process	24/6/2024, 10:14 am	Automated Process	24/6/2024, 10:14 am
Created by Me	estimated rice per day	Kasireddy Sree Lakshmi	24/6/2024, 9:50 pm	Kasireddy Sree Lakshmi	24/6/2024, 9:50 pm

12. 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 A 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.

DASHBOARDS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	amount data dashboard	Kasireddy Sree Lakshmi	24/6/2024, 9:59 pm	Kasireddy Sree Lakshmi	24/6/2024, 9:59 pm
Created by Me	Enablement Dashboard Spring '24	Automated Process	24/6/2024, 9:40 am	Automated Process	24/6/2024, 9:40 am
Private Dashboards	Enablement Dashboard Summer '24	Automated Process	24/6/2024, 10:14 am	Automated Process	24/6/2024, 10:14 am

✓ 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.
5. Preview is shown below.
 - 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.
6. Add widget.
 - display as donut chart
 - sort by >> sum of amount
 - title>>range of amount per day
 - component theme dark
7. Click add.
8. Click save and done.

