

CRM APPLICATION FOR WHOLESALE RICE MILL

Overview

The Rice Mill CRM Application is a comprehensive solution designed to streamline and simplify how much rice per day, how many were sold, what 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.

Features and Functionality

Reporting and Dashboards

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

Rollup Summary Field

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

Cross-Object Formula Field

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

Validation Rules

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

Permission Sets

- Organization Wide Defaults(OWD): Defines the baseline level of accessfor the most restricted user.
- Roles and Access:
 - Owner: Can view recordsof employers and workers.
 - Employer: Can viewrecords of workers.

Milestone 1 - Salesforce

Introduction

Are you new to Salesforce? Not sure exactlywhat it is, or how to use it? Don'tknow where you shouldstart on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module,we'll take you through these features and answer the question, "What is Salesforce, anyway?".

What Is Salesforce?

Salesforce is your customersuccess platform, designedto help you sell, service, market, analyze, and connect with yourcustomers. Salesforce has everything you need to run your business from anywhere. Usingstandard 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.

Activity 1: Creating a DeveloperAccount

To start using Salesforce, the first step is to create a developer org. Follow the steps below to create your Salesforce Developer Account:

Go to the Signup Page

- a. Navigate to the Salesforce DeveloperSignup page: [Salesforce Developer Signup](#)

Fill Out the Signup Form

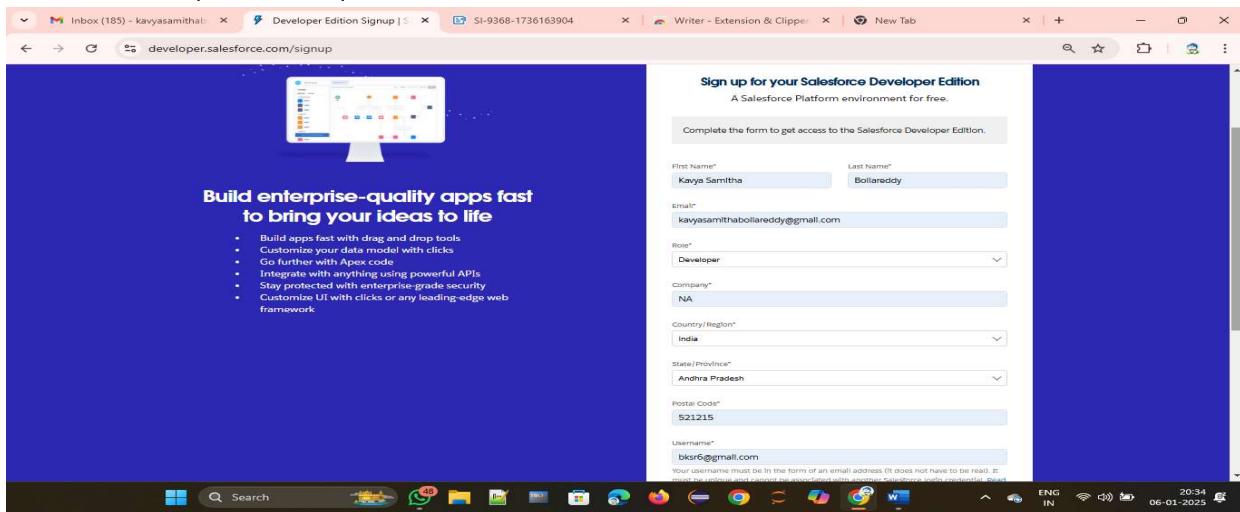
- b. First Name : Kavya Samitha
- c. Last Name : Bollareddy
- d. Email : kavyasamithabollareddy@gmail.com
- e. Role : Developer

- f. Company : NA
- g. Country : India
- h. Postal Code :521215
- i. Username :bksr6@gmail.com

Submit the Form

- j. After filling in the details,click on the "Sign me up" button

You have successfully created a Salesforce Developer Account. You will receive a confirmation email with further instructions to complete the setup.

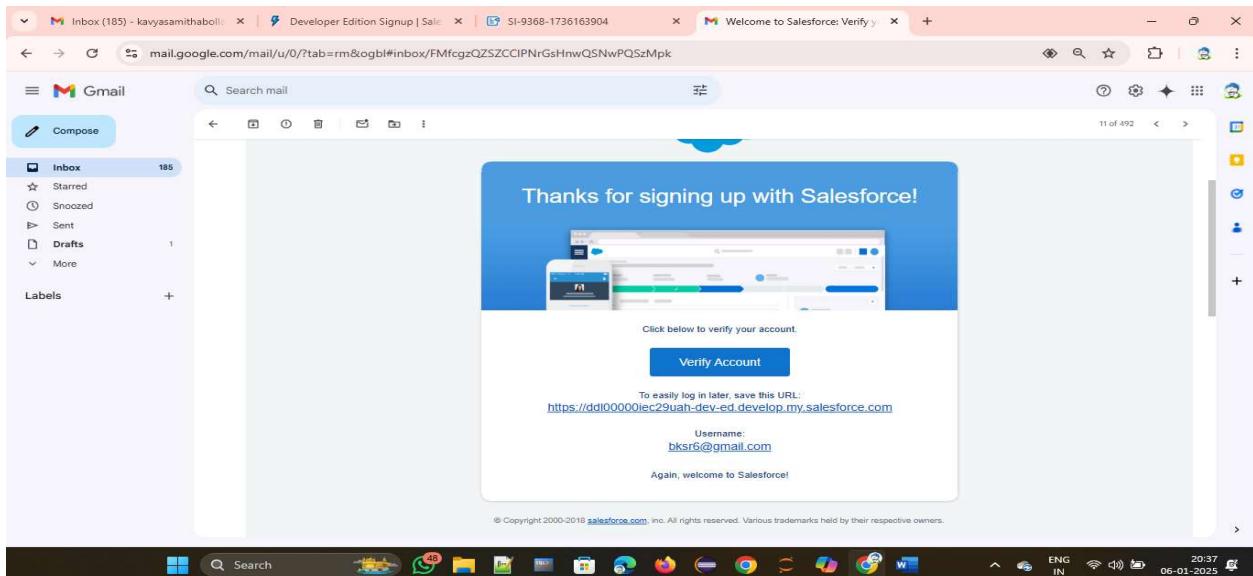


Activity 2: Account Activation

After creating your Salesforce Developer Account, you need to activate it. Follow these steps to activate your account:

Check Your Email

- a. Go to the inbox of the email address you used while signing up. The verification email may take 5-10 minutes to arrive.



Verify Your Account

- b. Open the email from Salesforce and click on the "Verify Account" link.
- c. On the verification page, create a password for your account.
- d. Answer a security question for account recovery.
- e. Click on "Change Password".

Milestone 2 - Object

What Is an Object?

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

Types of Salesforce Objects

Salesforce objects are of two types:

- a. Standard Objects: Standard objects are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- b. Custom Objects: Custom objects 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 Navigate to Setup Page:

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

To Create an Object:

- c. From the setup page, click on Object Manager
- d. Click on Create
- e. Click on Custom Object
- f. On the CustomObject defining page:
- g. Enter the Label Name and Plural Label Name
- h. Click on Allow Reports
- i. Click on Allow Search
- j. Click on Save

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

- Header:** The top navigation bar includes "Setup", "Home", and "Object Manager".
- Page Title:** "New Custom Object" is displayed prominently at the top left.
- Section:** "Custom Object Definition Edit" is the active section.
- Form Fields:**
 - Custom Object Information:** Fields include "Label" (set to "Account") and "Plural Label" (set to "Accounts"). A checkbox "Starts with vowel sound" is unchecked.
 - Object Name:** "Object Name" is set to "Account" and "Example: Account".
 - Description:** A large text area labeled "Description" is present but empty.
 - Help Settings:** "Context-Sensitive Help Setting" has two options: "Open the standard Salesforce.com Help & Training window" (selected) and "Open a window using a Visualforce page".
 - Content Name:** "Content Name" is set to "None".
- Buttons:** "Save", "Save & New", and "Cancel" buttons are located at the top right of the form.
- Message Bar:** A yellow message bar at the bottom states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles." It includes links "Tell me more!" and "Don't show this message again".
- Help:** "Help for this Page" is available at the top right.

Activity 1: Create Supplier Object

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

Navigate to Setup Page:

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

Create a Custom Object:

- c. From the setup page, click on ObjectManager.
- d. Click on Create.
- e. Click on Custom Object.

Define the Custom Object:

- f. Enter the Label Name : Supplier.
- g. Enter the Plural Label Name : Suppliers.
- h. Enter the RecordName Label and Format:
 - i. Record Name: Supplier Name
 - j. Data Type:Text

Set Additional Options:

- k. Click on Allow Reports.
- l. Click on Track Field History.
- m. Click on AllowSearch.

Save the Custom Object:

Click on Save.

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

Header: Search bar with "Search Setup" and various navigation icons.

Breadcrumbs: SETUP > OBJECT MANAGER > supplier

Left Sidebar (Details):

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules

Right Panel (Details):

Description:

API Name: supplier_c
Custom
Singular Label: supplier
Plural Label: supplier

Enable Reports:

Track Activities:

Track Field History:

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Buttons: Edit, Delete

The screenshot shows the Salesforce Setup interface with the "Record Name" section expanded in the "Details" panel:

Header: Search bar with "Search Setup" and various navigation icons.

Breadcrumbs: SETUP > OBJECT MANAGER > supplier

Left Sidebar (Details):

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules

Right Panel (Details):

Record Name Labels:

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: Example: Account
Plural Label: Example: Accounts
Starts with vowel sound:

Object Name:

The Object Name is used when referencing the object via the API.
Object Name: Example: Account

Description:

Context-Sensitive Help Setting:

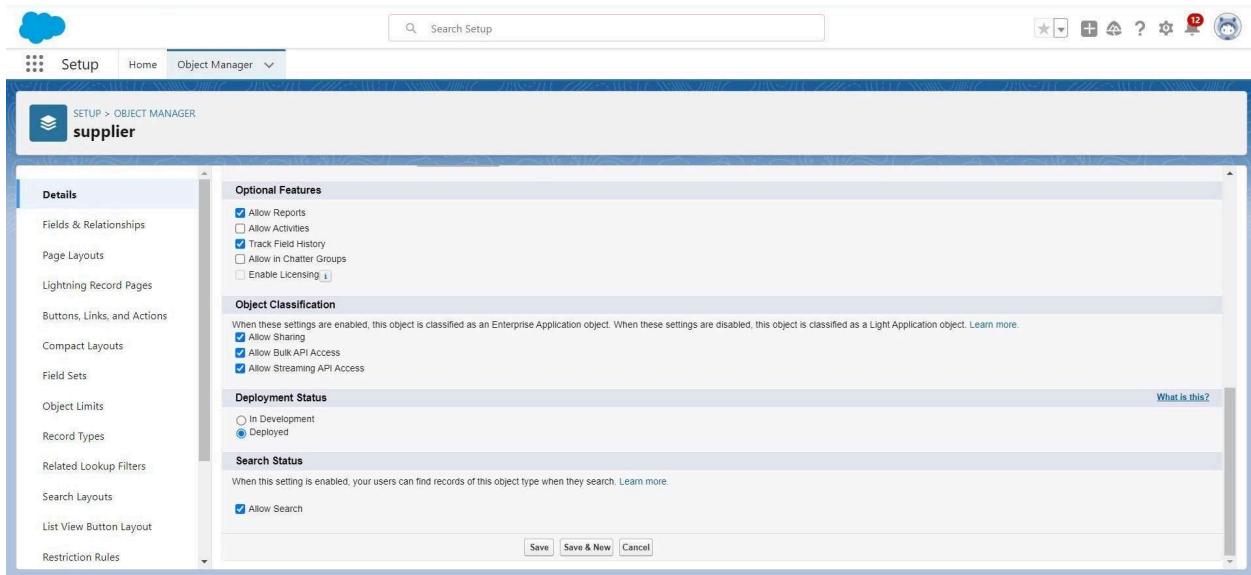
Open the standard Salesforce.com Help & Training window
 Open a window using a Visualforce page

Content Name: None

Enter Record Name Label and Format:

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Example: Account Name
Data Type: Text
Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.



Activity 2: Create Rice Mill Object

To create a Rice Mill object in Salesforce, follow these steps:

Navigate to Setup Page:

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

Create a Custom Object:

- C. From the setup page, click on **Object Manager**.
- d. Click on **Create**.
- e. Click on **Custom Object**.

Define the Custom Object:

- f. Enter the **Label Name**: Rice Mill.
- g. Enter the **Plural Label Name**: Rice Mills.
- h. Enter the **Record Name Label and Format**:
- i. **Record Name**: Leave it blank.

j. **Data Type:** Auto Number

k. **DisplayFormat:** rice-{000}

l. **StartingNumber:** 1

Set AdditionalOptions:

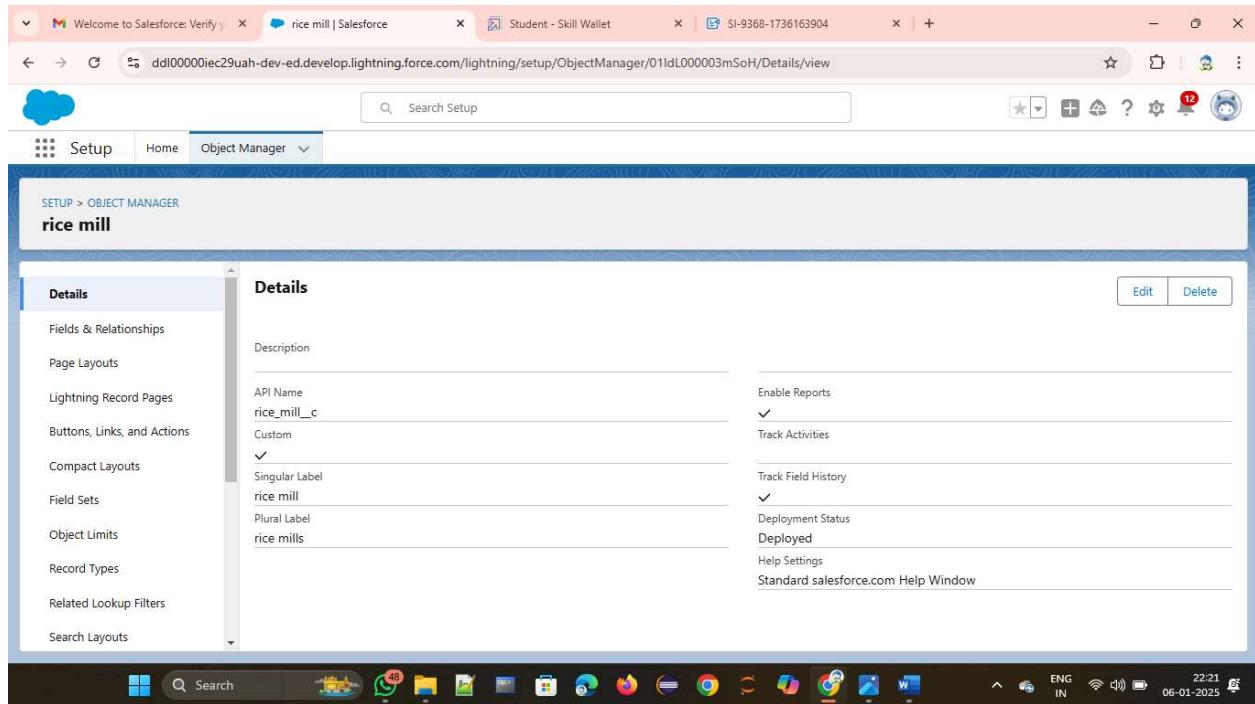
m. Click on **Allow Reports.**

n. Click on **Track FieldHistory.**

o. Click on **Allow Search.**

Save the Custom Object:

p. Click on **Save.**



The top screenshot shows the 'rice mill' object's details page under 'OBJECT MANAGER'. It includes fields for Label ('rice mill'), Plural Label ('rice mills'), Object Name ('rice_mill'), and Description. Context-Sensitive Help Setting is set to open the standard Salesforce.com Help & Training window. Record Name is 'rice mill Name', Data Type is 'Auto Number', and Display Format is 'rice-(000)'. The bottom screenshot shows the 'Optional Features' section where 'Allow Reports' and 'Track Field History' are checked. Other features like 'Allow Activities' and 'Allow in Chatter Groups' are unchecked. Under 'Object Classification', 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access' are checked. Deployment Status is set to 'Deployed'. Search Status is enabled with 'Allow Search' checked.

Activity 3: Create Consumer Object

To create a Consumer object in Salesforce, follow the same steps as mentioned in Activity 2 for creating the Rice Mill object. Use the following details for the Consumer object:

Navigate to Setup Page:

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

Create a Custom Object:

- C. From the setup page, click on ObjectManager.
- d. Click on Create.
- e. Click on Custom Object.

Define the Custom Object:

- f. Enter the Label Name: Consumer.
- g. Enter the Plural Label Name: Consumers.
- h. Enter the Record Name Label and Format:
 - i. Record Name: Leave it blank.
 - j. Data Type: Auto Number
 - k. Display Format: consumers-{000}
 - l. Starting Number: 1

Set Additional

Options:

- m. Click on AllowReports.
- n. Click on Track Field History.
- o. Click on AllowSearch.

Save the Custom Object:

- p. Click on Save.

Welcome to Salesforce: Verify consumer | Salesforce Student - Skill Wallet SI-9368-1736163904

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

Details

Description

API Name consumer_c
Custom ✓
Singular Label consumer
Plural Label consumers

Enable Reports ✓
Track Activities
Track Field History ✓
Deployment Status Deployed
Help Settings Standard salesforce.com Help Window

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Edit Delete

javascript:wid();

Search Setup

ENG IN 22:26 06-01-2025

SETUP > OBJECT MANAGER consumer

Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label consumer Example: Account
Plural Label consumers Example: Accounts
Starts with vowel sound

The Object Name is used when referencing the object via the API.
Object Name consumer Example: Account

Description

Context-Sensitive Help Setting Open the standard Salesforce.com Help & Training window Open a window using a Visualforce page
Content Name None

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name consumer Name Example: Account Name
Data Type Auto Number Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.
Display Format consumers-{000} Example: A-{0000} What Is This?

SETUP > OBJECT MANAGER consumer

Details

Optional Features

Allow Reports
 Allow Activities
 Track Field History
 Allow in Chatter Groups
 Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

In Development
 Deployed

Search Status

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

Allow Search

Save Save & New Cancel

Activity 4: Create Rice Details Object

To create a Rice Details object in Salesforce, follow these steps:

Navigate to Setup Page:

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

Create a Custom Object:

- c. From the setup page, click on ObjectManager.
- d. Click on Create.
- e. Click on Custom Object.

Define the Custom Object:

- f. Enter the Label Name: Rice Details.
- g. Enter the Plural Label Name: Rice Details.
- h. Enter the Record Name Label and Format:
 - i. Record Name: Leave it blank.
 - j. Data Type: Auto Number
 - k. Display Format: rice-{000}
 - l. Starting Number: 1

Set Additional Options:

- m. Click on Allow Reports.
- n. Click on Track Field History.
- o. Click on Allow Search.

Save the Custom Object:

p. Click on Save.

The image consists of two vertically stacked screenshots of the Salesforce Setup interface, specifically the Object Manager section for the 'rice details' custom object.

Screenshot 1 (Top): This screenshot shows the 'rice details' object in the 'Details' tab of the Object Manager. The API Name is set to 'rice_details__c'. Other settings include:

- Description: rice details
- Enable Reports: checked
- Track Activities: checked
- Track Field History: checked
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

Screenshot 2 (Bottom): This screenshot shows the 'rice details' object in the 'Edit Custom Object Definition Edit' screen. The 'Custom Object Information' section includes:

- Object Name: rice_details (Example: Account)
- Plural Label: rice details (Example: Accounts)
- Starts with vowel sound: unchecked
- Description: (empty text area)

At the bottom of this screen, there are 'Context-Sensitive Help Setting' options:

- Open the standard Salesforce.com Help & Training window (radio button selected)
- Open a window using a Visualforce page

Below these settings is a 'Content Name' field with the value '-None-'.

Milestone 3 - Tabs

What is a Tab?

A tab is a user interface element used to build records for objects and view the records within those objects.

Custom Tabs: Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard Salesforce tabs such as accounts, contacts, and opportunities.

Action	Label	Tab Style	Description
Edit Del	consumers	Star	
Edit Del	rice details	Headset	
Edit Del	rice mills	Guitar	
Edit Del	supplier	Flag	

Activity 1: Creating a Custom Tab (Supplier)

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

1. Navigate to Setup Page:

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

2. Create a New Custom Object Tab:

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

3. Select Object and Tab Style:

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

4. Add to ProfilesPage:

- h. Keep it as default.
- i. Click on Next.

5. Add to Custom App:

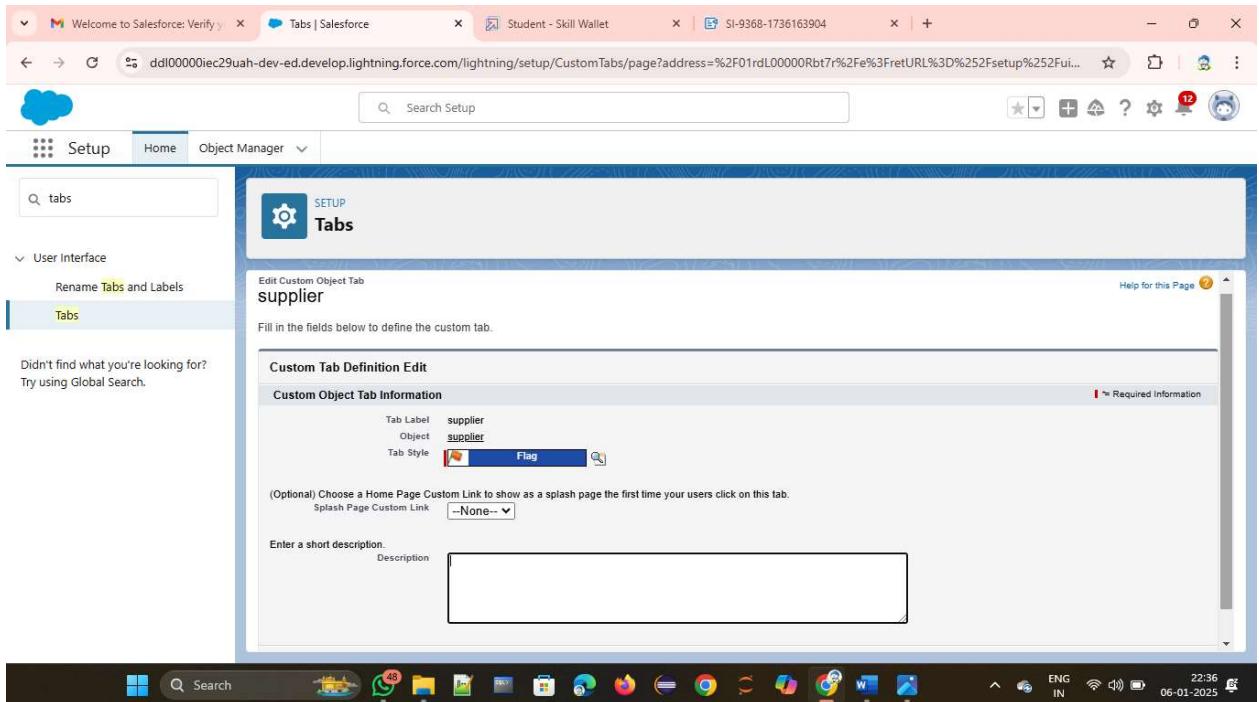
- j. Uncheck the IncludeTab checkbox.

6. Append Tab to Users' ExistingPersonal Customizations:

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

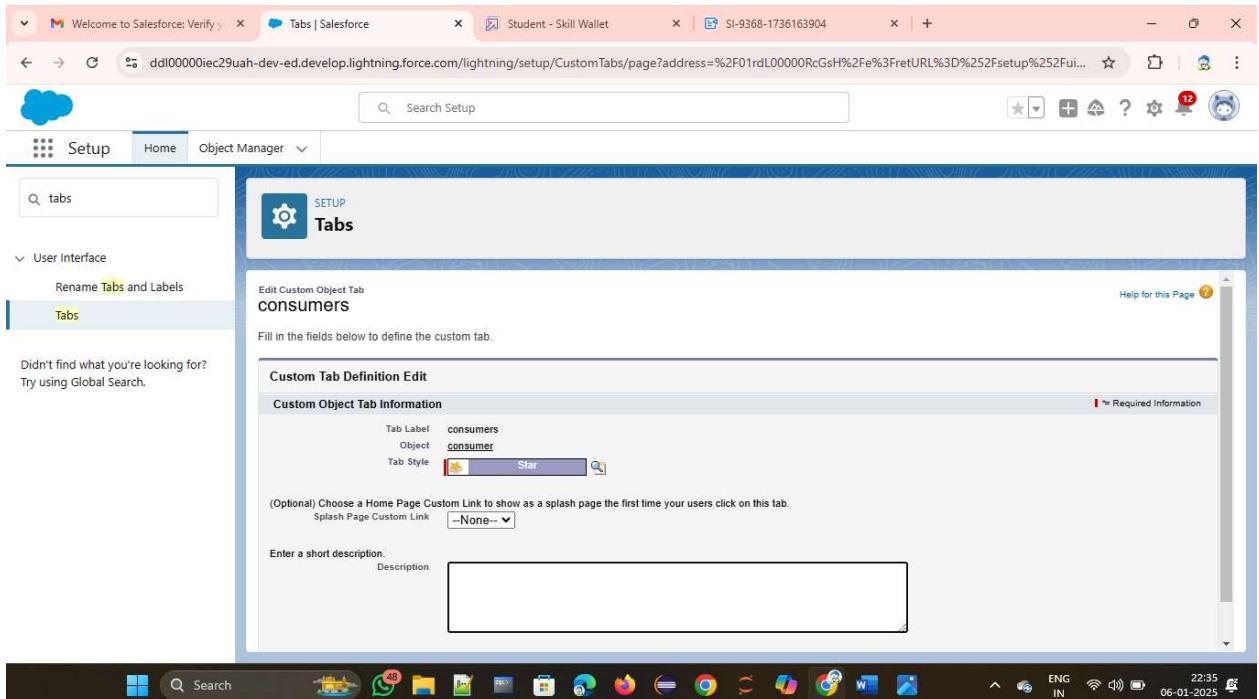
7. Save the Custom Tab:

- l. Click on Save.



Activity 2: Creating Remaining Tabs

To create tabs for the remaining objects(Rice Mill, Consumer,Rice Details), follow the same steps as mentioned in Activity 1



The image consists of two vertically stacked screenshots of the Salesforce Setup interface, specifically the 'Tabs' section.

Screenshot 1: Creating a Custom Tab for 'rice details'

- Tab Label:** rice details
- Object:** rice_details
- Tab Style:** Headset (selected)
- (Optional) Choose a Home Page Custom Link:** None
- Description:** (empty text area)

Screenshot 2: Creating a Custom Tab for 'rice mills'

- Tab Label:** rice mills
- Object:** rice_mill
- Tab Style:** Guitar (selected)
- (Optional) Choose a Home Page Custom Link:** None
- Description:** (empty text area)

Both screenshots show the same overall layout with a sidebar on the left containing 'User Interface' and 'Tabs' sections, and a main editing area with a 'Custom Tab Definition Edit' form.

Milestone 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 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.

Activity 1: Create a LightningApp

To create a Lightning app page, follow these steps:

1. Navigate to App Manager:

- a. Go to the setup page.
- b. Search for "App Manager" in the Quick Find bar.
- c. Select "App Manager".
- d. Click on New Lightning App.

2. Fill in App Details:

- e. Enter the app name as MY RICE.
- f. Click Next.

3. App Options Page:

- g. Keep the settings as default.
- h. Click Next.

4. Utility Items Page:

- i. Keep the settings as default.
- j. Click Next.

5. Upload a Photo:

- k. Upload a photo that is related to your app.

6. Add Navigation Items:

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

n. Click Next.

Add User Profiles:

o. Search for profiles (System Administrator) in the searchbar.

p. Click on the arrow button to add the profile.

q. Click Save & Finish.

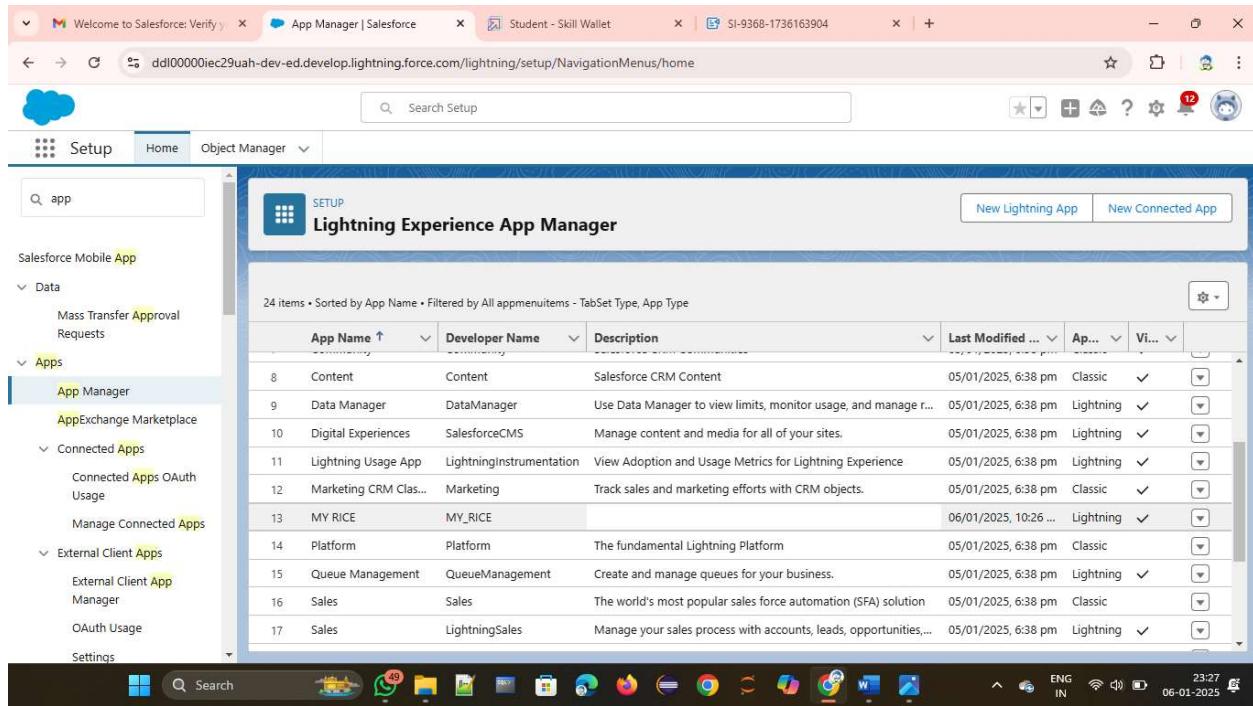
The screenshot shows two consecutive screenshots of the Lightning App Builder interface.

Screenshot 1: App Details & Branding

- Left Sidebar:** Shows the 'App Settings' menu with 'App Details & Branding' selected.
- Content Area:**
 - App Details:** Fields include 'App Name' (MY RICE), 'Developer Name' (MY_RICE), and 'Description' (Enter a description...).
 - App Branding:** Includes an 'Image' section with a placeholder image and a color picker set to #0070D2.
 - Org Theme Options:** A checkbox for 'Use the app's image and color instead of the org's custom theme' is present.
 - App Launcher Preview:** Shows a preview of the app icon (MR logo) and name (MY RICE).

Screenshot 2: User Profiles

- Left Sidebar:** Shows the 'App Settings' menu with 'User Profiles' selected.
- Content Area:**
 - User Profiles:** A section titled 'Choose the user profiles that can access this app.'
 - Available Profiles:** A list of profiles including Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, B2B Reordering Portal Buyer Profile, Contract Manager, Custom: Marketing Profile, Custom: Sales Profile, and Custom Current Profile.
 - Selected Profiles:** A list of profiles including System Administrator, worker, and employer.



Milestone 5: Fields

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

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields

As the name suggests, Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field unless it is a non-required standard field. Otherwise, users have the option to delete them freely at any point from the application. Some common fields you will find in every Salesforce application include:

- a. Created By
- b. Owner
- c. Last Modified
- d. Field Made During Object Creation

Custom Fields

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to their requirements. Each organization or company can use them if necessary. It means you do not always need to include them in the records, unlike Standard Fields. Hence, the final decision depends on the user, who can add or remove Custom Fields as needed.

Activity 1: Creating the Number Field in Rice Details Object

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

Navigate to Object Manager:

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

Edit the Rice Details Object:

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

Create a New Field:

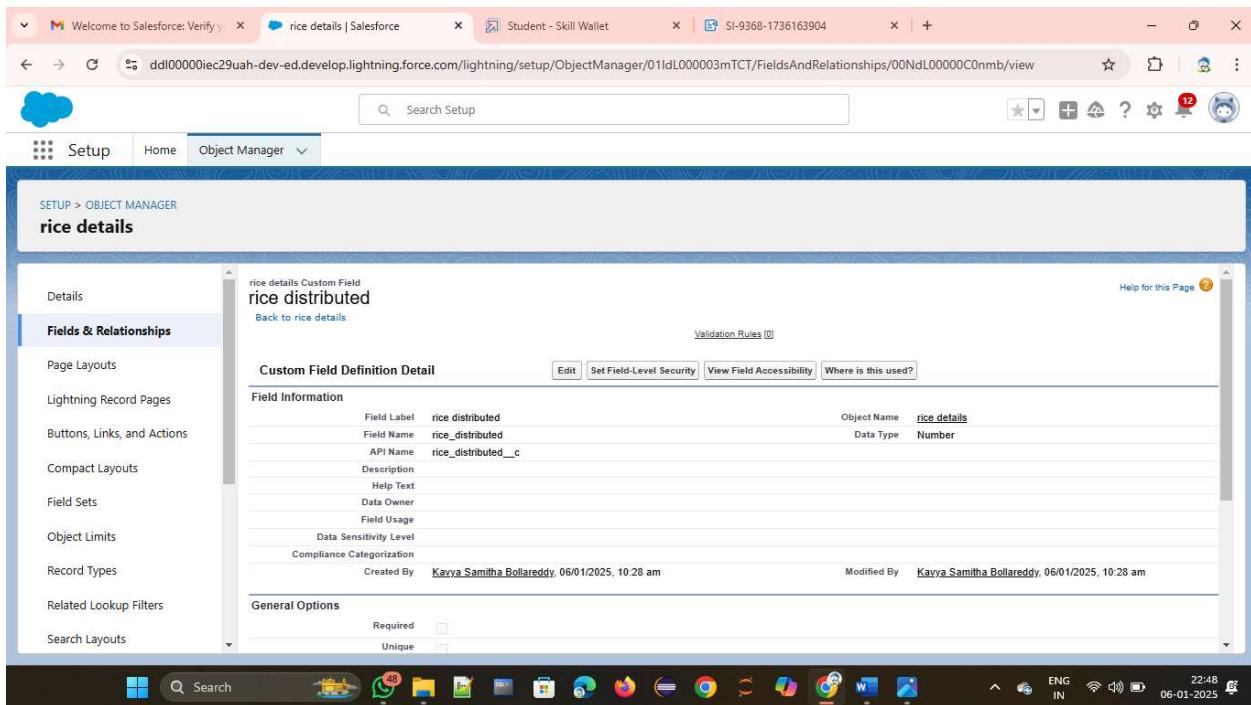
- d. Click on Fields & Relationships.
- e. Click on New.

Select Data Type:

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

Define Field Properties:

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



Activity 2: Creating Junction Object

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

Creating Junction Object: 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.

g. Click Next.

Relate to Supplier Object:

h. Select the relatedobject Supplier.

i. Click Next.

Define Field Properties:

j. Give the Field Label as Supplier Name.

k. Click Next.

l. Click Next again.

m. Click Save & New.

Repeat Steps for Rice Mill Object:

n. Follow the same steps from 1to 3.

o. Select the related object Rice Mill.

p. Click Next.

Define Field Properties for Rice Mill:

q. Give the Field Label as Rice Mill 1 (one).

r. Click Next.

s. Click Next again.

t. Click Save.

The screenshot shows the Salesforce Object Manager interface. A custom field named 'supplier Name' is being edited under the 'rice details' object. The 'Fields & Relationships' tab is selected. In the 'Master-Detail Options' section, 'Related To' is set to 'supplier' and 'Child Relationship Name' is set to 'rice_details'. The 'Object Name' is 'rice_details' and 'Data Type' is 'Master-Detail'. The 'Field Information' table includes fields like Field Label ('supplier Name'), Field Name ('supplier_Name'), and API Name ('supplier_Name__c'). The page also shows other tabs like 'Details' and 'Validation Rules [0]'. The browser taskbar at the bottom indicates it's 06-01-2025 at 22:49.

This screenshot is identical to the one above, showing the configuration of the 'rice details' custom field. The 'Fields & Relationships' tab is active, and the 'Master-Detail Options' section shows 'Related To' set to 'rice mill' and 'Child Relationship Name' set to 'rice_details'. The 'Object Name' is 'rice_details' and 'Data Type' is 'Master-Detail'. The 'Field Information' table includes fields like Field Label ('rice mill 1(one)'), Field Name ('rice_mill_1_one'), and API Name ('rice_mill_1_one__c'). The page also shows other tabs like 'Details' and 'Validation Rules [0]'. The browser taskbar at the bottom indicates it's 06-01-2025 at 22:51.

Activity 3: 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:

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

Create a New Field:

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

Select Data Type:

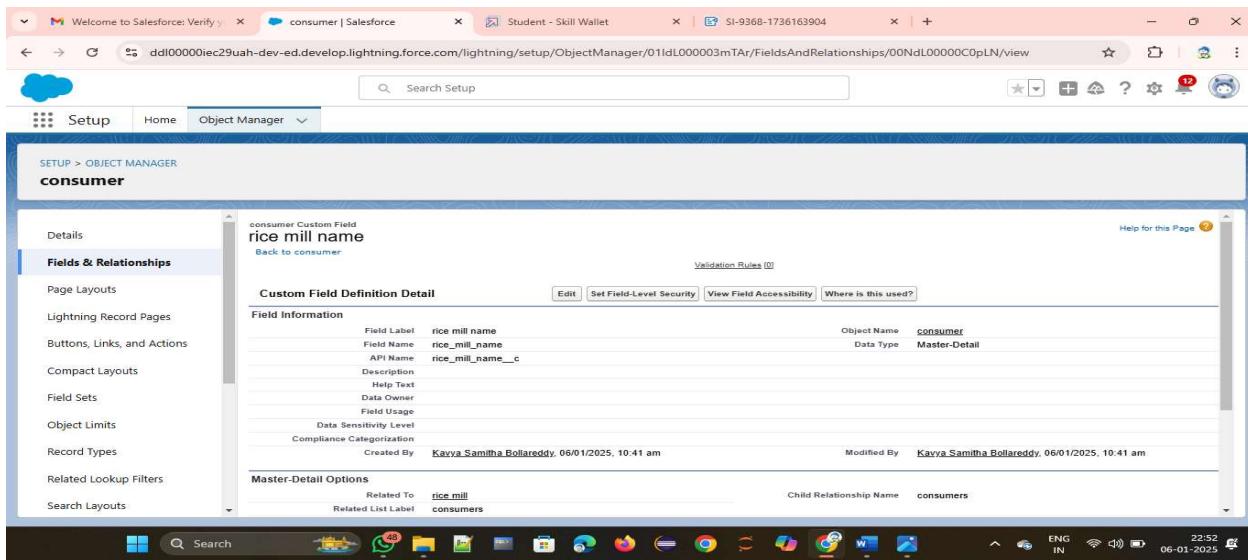
- f. Select Master-Detail Relationship as the data type.
- g. Click Next.

Relate to Rice Mill Object:

- h. Select the relatedobject Rice Mill.
- i. Click Next.

Define Field Properties:

- j. Give the Field Label as Rice Mill Name.
- k. Click Next. , Click Next again.
- l. Click Save.



Activity 4: Creating the Roll-up Summary

A roll-upsummary 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:

- a. Go to the setup page.
- b. Click on Object Manager.
- c. Type the object name Supplier in the searchbar.
- d. Click on the object.

Create a New Field:

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

Select Data Type:

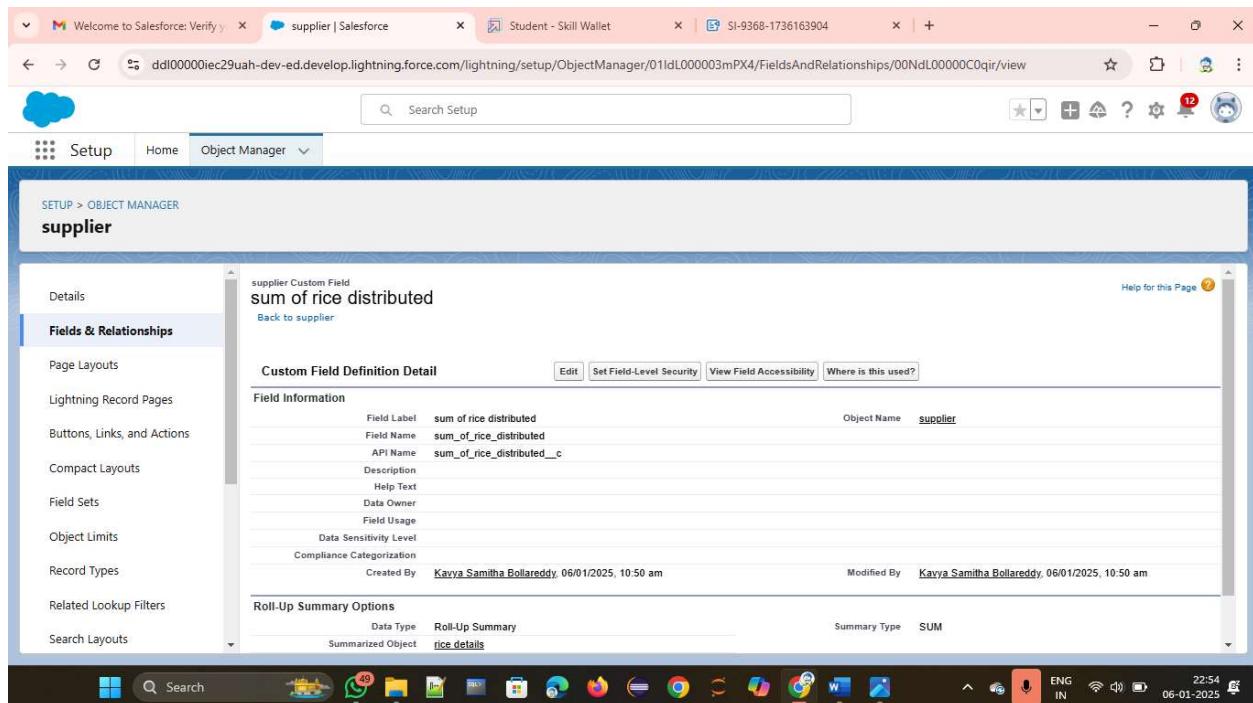
- g. Select the data type as Roll-up Summary.
- h. Click Next.

Define Field Properties for Supplier:

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

Configure Roll-upSummary for Supplier:

- k. Select the summarized object as Rice Details.
- l. Select the roll-up type as SUM.
- m. Select the field to aggregateas Rice Distributed.
- n. Click Next. , Click Next again.
- o. Click Save.



Repeat Steps for Rice Mill Object:

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

Configure Roll-upSummary for Rice Mill:

- d. Select the summarized object as Rice Details.
- e. Select the roll-up type as SUM.
- f. Select the field to aggregate as Rice Distributed.
- g. Click Next. ,
- h. Click Next again.
- i. Click Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The main title is 'rice mill'. On the left, a sidebar lists various customization options under 'Fields & Relationships'. The central panel displays the 'Custom Field Definition Detail' for the field 'rice distributed to shops'. Key details shown include:

Field Information	Value
Field Label	rice distributed to shops
Field Name	rice_distributed_to_shops
API Name	rice_distributed_to_shops_c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Kavya Samitha Bollareddy, 06/01/2025, 11:08 pm
Modified By	Kavya Samitha Bollareddy, 06/01/2025, 11:08 pm

Below this, the 'Roll-Up Summary Options' section shows:

Data Type	Summary Type
Roll-Up Summary	SUM

The 'Summarized Object' dropdown is set to 'rice details'.

Additional Steps for Consumer Object Create the

Field:

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

Repeat Steps for Rice Mill Object:

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

d. Click Next.

Configure Roll-upSummary for Rice Mill (Consumer):

e. Select the summarized object as Consumer.

f. Select the roll-up type as SUM.

g. Select the field to aggregate as Rice Taken in Shops.

h. Click Next .

i. Click Next again.

j. Click Save.

SETUP > OBJECT MANAGER
rice mill

rice mill Custom Field
rice taken

Custom Field Definition Detail

Field Information	Object Name
Field Label: rice taken	rice mill
Field Name: rice_taken	
API Name: rice_taken_c	
Description:	
Help Text:	
Data Owner:	
Field Usage:	
Data Sensitivity Level:	
Compliance Categorization:	
Created By: Kavya Samitha Bollareddy 06/01/2025, 11:13 am	Modified By: Kavya Samitha Bollareddy 06/01/2025, 11:13 am

Roll-Up Summary Options

Data Type	Summary Type
Roll-Up Summary	SUM

Summarized Object: consumer

Activity 5: Creating Fields in Objects

Creating the number fieldin the Rice Details object.

Navigate to Setup:

a. Go to the setup page.

b. Click on "Object Manager" from the top navigation menu.

Edit Rice Details Object:

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

Create New Field:

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

Select Data Type:

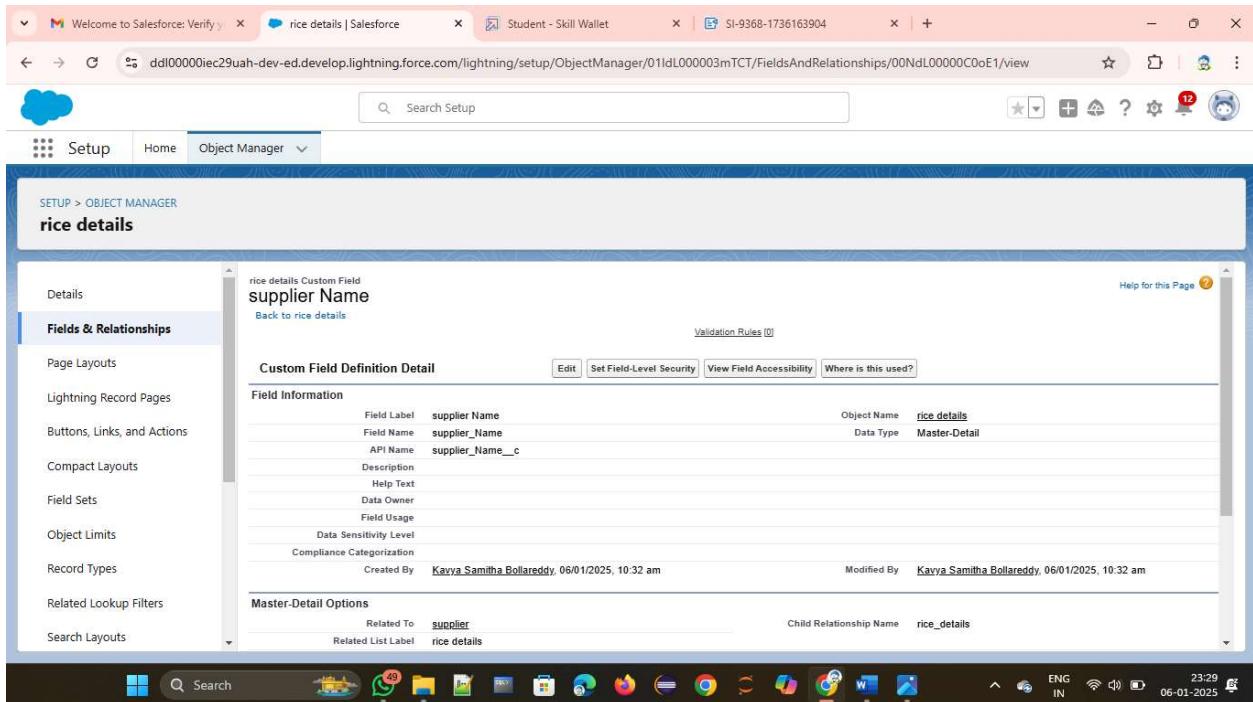
- f. Choose "Number" as the data type for the field.
- g. Click "Next."

Define Field Properties:

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

Proceed with Creation:

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



Activity 6: Creating Fields in Rice Mill Objects

Navigate to Setup:

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

Edit Rice Mills Object:

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

Create New Field:

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

Select Data Type:

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

- h. Given the Field Label as "Rice Price/kg" and length as "5".

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The main page title is 'rice mill'. On the left, a sidebar lists various setup options under 'Fields & Relationships'. The central panel displays the 'Custom Field Definition Detail' for a field named 'rice price/kg'. Key details shown include:

Field Information	Object Name	Data Type
Field Label: rice price/kg	rice mill	Number
Field Name: rice_price_kg		
API Name: rice_price_kg_c		
Description:		
Help Text:		
Data Owner:		
Field Usage:		
Data Sensitivity Level:		
Compliance Categorization:		
Created By: Kavya Samitha Bollareddy, 06/01/2025, 11:20 am	Modified By: Kavya Samitha Bollareddy	06/01/2025, 11:20 am
General Options: Required: <input type="checkbox"/> Unique: <input type="checkbox"/>		

Activity 7: Creating Fields in Consumer Objects

Navigate to Setup:

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

Edit Consumer Object:

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

Create New Field For First Name:

The screenshot shows the Salesforce Object Manager interface. A custom field named "First name" has been created for the "consumer" object. The field is of type Text and is required. It was created by Kavya Samitha Bollareddy on June 1, 2025, at 11:29 am.

Custom Field Definition Detail

Field Label	First name	Object Name	consumer
Field Name	First_name	Data Type	Text
API Name	First_name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Kavya Samitha Bollareddy, 06/01/2025, 11:29 am	Modified By	Kavya Samitha Bollareddy, 06/01/2025, 11:29 am

General Options

Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>

Create New Field For Last Name:

The screenshot shows the Salesforce Object Manager interface. A custom field named "Last name" has been created for the "consumer" object. The field is of type Text and is required. It was created by Kavya Samitha Bollareddy on June 1, 2025, at 11:30 am.

Custom Field Definition Detail

Field Label	Last name	Object Name	consumer
Field Name	Last_name	Data Type	Text
API Name	Last_name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Kavya Samitha Bollareddy, 06/01/2025, 11:30 am	Modified By	Kavya Samitha Bollareddy, 06/01/2025, 11:30 am

General Options

Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>

Create New Field For Email :

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Welcome to Salesforce: Verify', 'consumer | Salesforce', 'Student - Skill Wallet', and 'SI-9368-1736163904'. The main title is '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 pane displays the 'Custom Field Definition Detail' for a field named 'email'. The field label is 'email', field name is 'email', API name is 'email_c', and object name is 'consumer'. Data type is 'Email'. The field is required. It was created by Kavya Samitha Bollareddy on 06/01/2025 at 11:32 am and modified by the same user at 11:32 am. A note indicates it is used in 'Back to consumer'.

Create New Field For Rice Taken By Shops:

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Welcome to Salesforce: Verify', 'consumer | Salesforce', 'Student - Skill Wallet', and 'SI-9368-1736163904'. The main title is '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 pane displays the 'Custom Field Definition Detail' for a field named 'Rice taken by shops'. The field label is 'Rice taken by shops', field name is 'Rice_taken_by_shops', API name is 'Rice_taken_by_shops_c', and object name is 'consumer'. Data type is 'Number'. The field is required. It was created by Kavya Samitha Bollareddy on 06/01/2025 at 11:33 am and modified by the same user at 11:33 am. A note indicates it is used in 'Back to consumer'.

Create New Field For Rice Type:

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Welcome to Salesforce: Verify', 'consumer | Salesforce', 'Student - Skill Wallet', and 'SI-9368-1736163904'. The main title is '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 pane displays the 'Custom Field Definition Detail' for a field named 'Rice type'. The field details are as follows:

Field Label	Rice type	Object Name	consumer
Field Name	Rice_type	Data Type	Picklist
API Name	Rice_type_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Kavya Samitha Bollareddy, 06/01/2025, 11:57 am	Modified By	Kavya Samitha Bollareddy, 06/01/2025, 11:57 am

General Options include 'Required' (unchecked) and 'Default Value'.

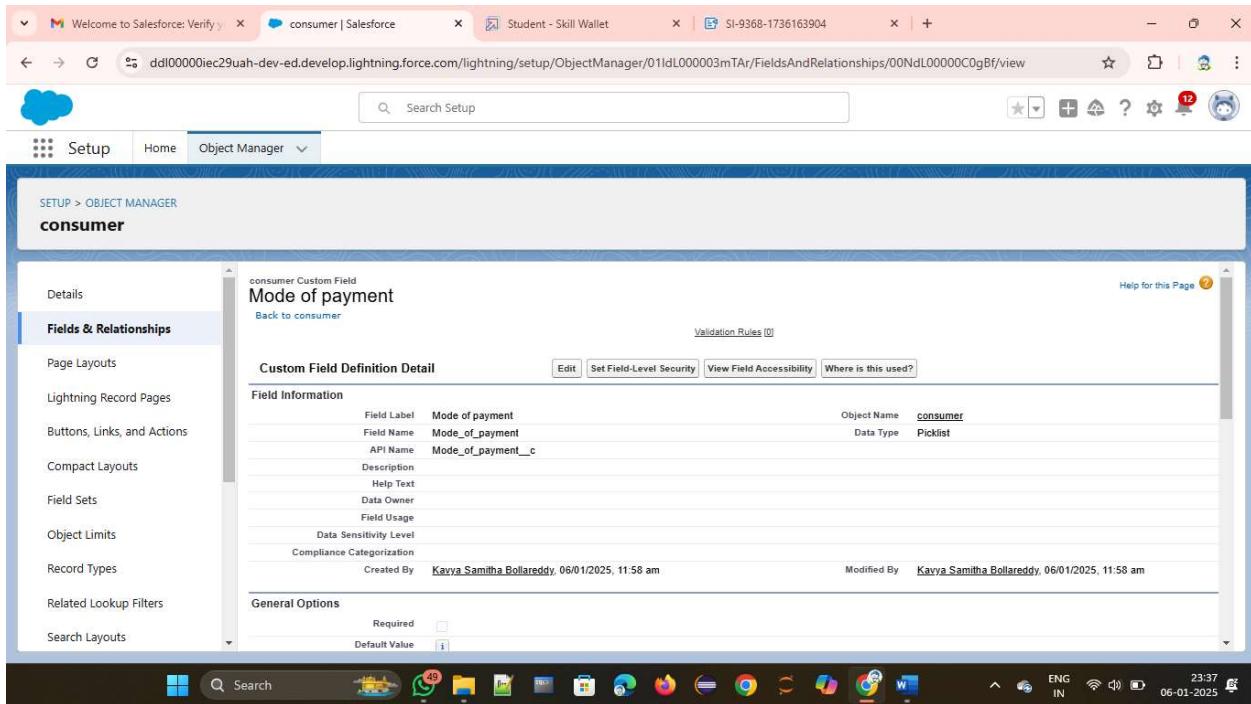
Create New Field For Phone Number:

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Welcome to Salesforce: Verify', 'consumer | Salesforce', 'Student - Skill Wallet', and 'SI-9368-1736163904'. The main title is '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 pane displays the 'Custom Field Definition Detail' for a field named 'Phone number'. The field details are as follows:

Field Label	Phone number	Object Name	consumer
Field Name	Phone_number	Data Type	Phone
API Name	Phone_number_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Kavya Samitha Bollareddy, 06/01/2025, 11:31 am	Modified By	Kavya Samitha Bollareddy, 06/01/2025, 11:31 am

General Options include 'Required' (unchecked) and 'Default Value'.

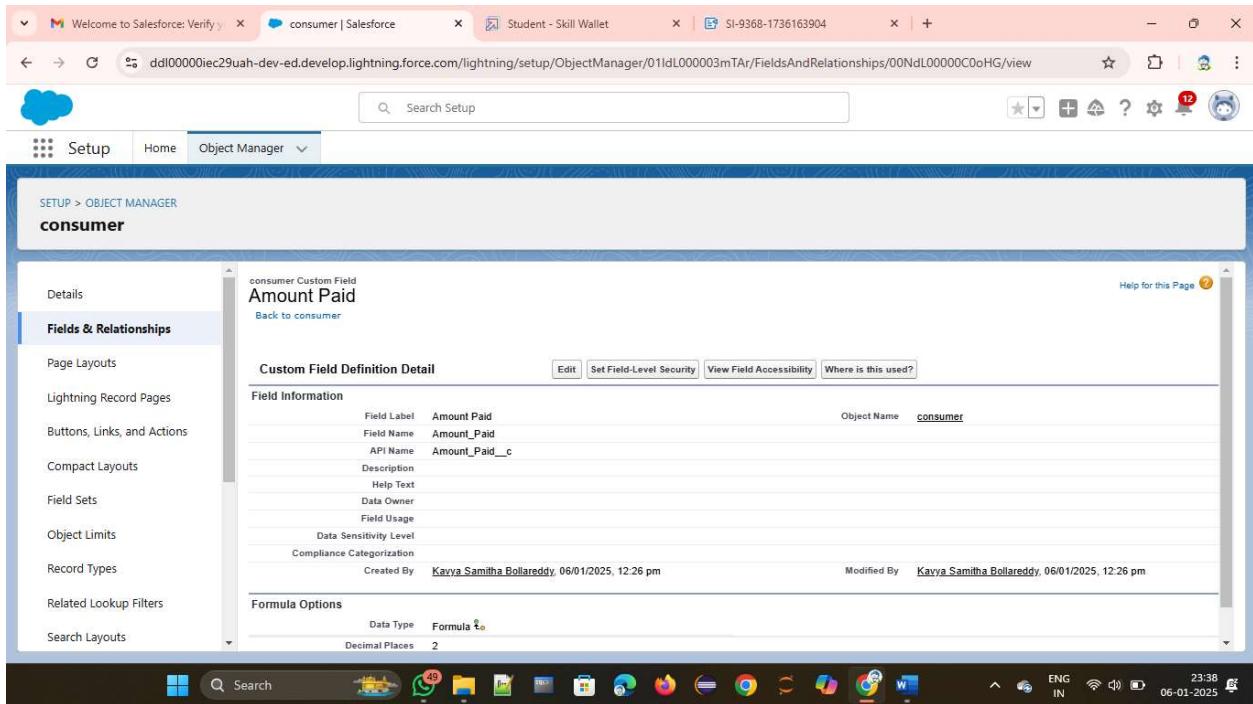
Create New Field For Mode Of Payment:



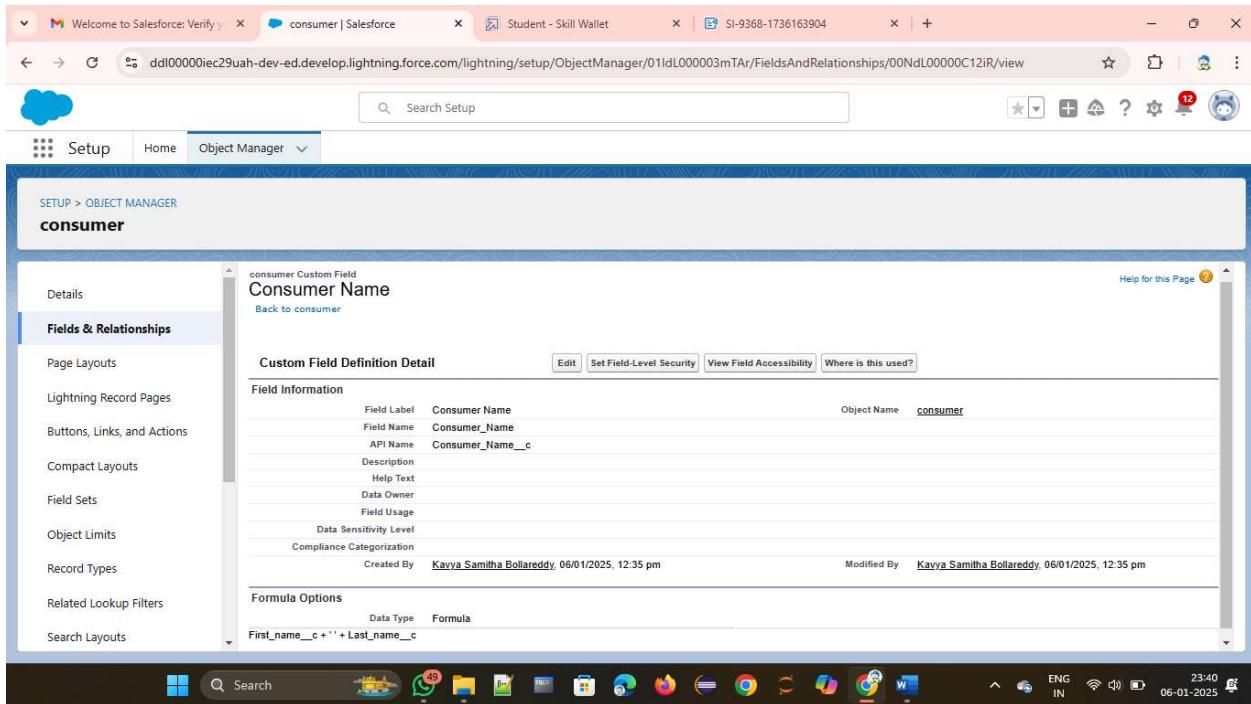
Activity 8: Creating Cross Object Formula Field in Consumer Object

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

- a. Goto setup → click on Object Manager → type object name (consumer) in the searchbar Click on Fields & Relationships → click on New.
- b. Select Data type as “Formula” and click Next.
- c. 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



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



Activity 9: 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 ValidationRule for Phone Number Field in Consumer Object

- i. Go to the setup page → click on Object Manager → from the dropdown click edit for the consumer object.
- ii. Click on Validation Rules → click New.
- iii. Enter the Rule Name as “Phonenumberoremailblankrule”.
- iv. Enter the Description as “Phone number and email should not be blank”.
- v. Enter the formula as: OR(ISBLANK(phone_number__c), ISBLANK(email__c)).
- vi. Check the syntax.
- vii. Under the Error Message, Write “Please fill in your PhoneNumber”.
- viii. Save Validation rule .

The screenshot shows the Salesforce Setup interface for the 'consumer' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the 'consumer Validation Rule' detail page. The rule is named 'Phonenumberoremailblankrule' and is active. The error condition formula is 'OR(ISBLANK(Phone_number__c), ISBLANK(email__c))'. The error message is 'please fill in your phone number.' and 'phone number and email number should not be blank'. The rule was created by Kavya Samitha Bollareddy on 06/01/2025, 12:43 pm.

Overall SupplierFields

The screenshot shows the Salesforce Setup interface for the 'supplier' object. The left sidebar lists various setup categories. The main content area displays the 'Fields & Relationships' section, which lists five items sorted by Field Label. The table shows the following fields:

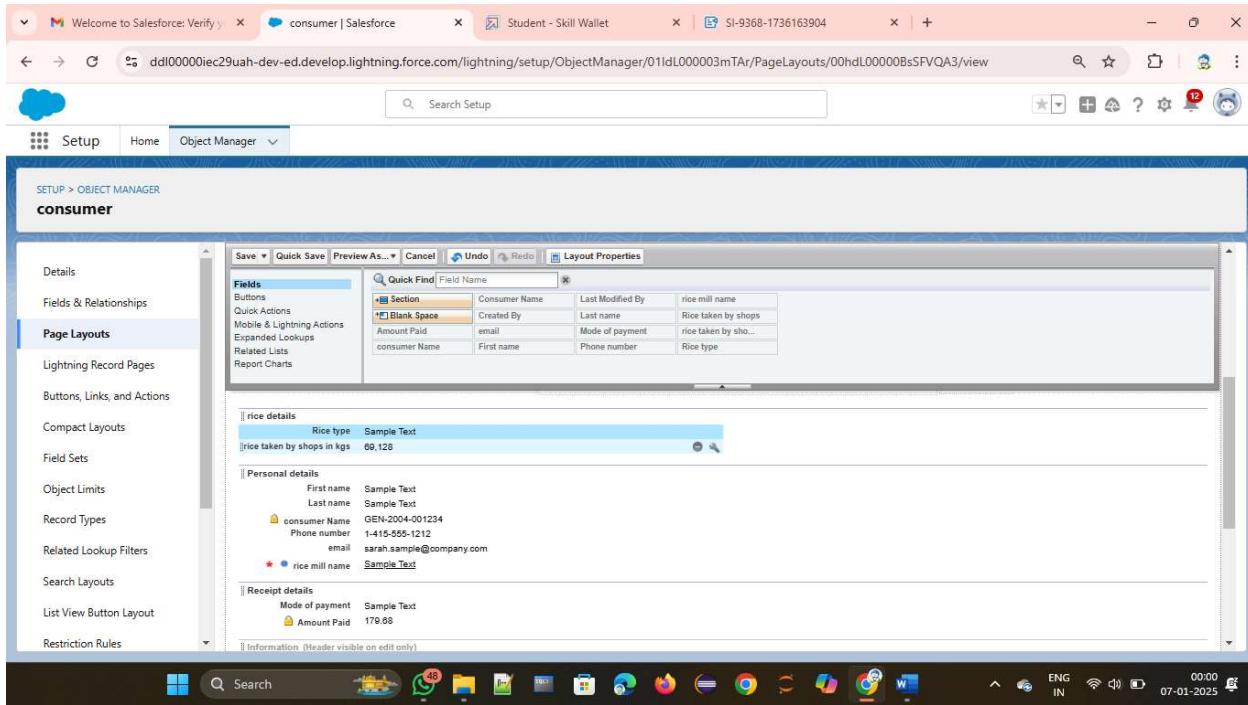
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
sum of rice distributed	sum_of_rice_distributed_c	Roll-Up Summary (SUM rice details)		
Supplier Name	Name	Text(80)		

Milestone 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.

Activity 1: Creating the Page Layout

- a. Go to Setup → Click on Object Manager → Search for the object(consumer) → From the dropdown select the object and click on it.
- b. Click on Page Layout → Click on New.
- c. Select the existing page layout, and give the page layout name as "consumer layout", and click Save.
- d. Drag and drop the section field to ConsumerDetails and create the section.
- e. Enter the section name as "Personal Details", → click Ok.
- f. Now drag the fields to this section that are mentioned: First Name , Last Name , ConsumerName , etc.
- g. Follow the same process for another two sections as shown above. They are:
 - i. Section: "Rice Details" Fields: Rice Taken by Shop, Rice Type
 - ii. Section: "Receipt Details" Fields: Mode of Payment, Amount Paid
- h. Click Save.



Milestone 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, recordtypes, login hours, and login IP ranges. You can define profiles by the user's job function. For example, System Administrator, Developer, Sales Representative.

Types of Profiles in Salesforce

1. Standard Profiles

By default, Salesforce provides the following standard profiles:

- a. Contract Manager
- b. Read Only
- c. Marketing User
- d. Solutions Manager
- e. Standard User
- f. System Administrator

2. Custom Profiles

Custom profiles are defined by us. They can be deleted if there are no users assigned with that particular profile.

Activity 1: Owner Profile

To create a new profile:

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

Activity 2: Employer Profile

To create a new profile:

- a. 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.
- b. While still on the profile page, click Edit.
- c. Select the Custom App settings as default for the rice mill.
- d. Scroll down to CustomObject Permissions and give accesspermissions for consumer, rice details, rice mill, and suppliers objects as mentioned in the below diagram. Click Save.

Activity 3: Workers Profile

To create a new profile:

- a. 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.
- b. While still on the profile page, click Edit.
- c. Select the Custom App settings as default for the rice mill.
- d. Scroll down to CustomObject Permissions and give accesspermissions for consumer, rice details, rice mill, and suppliers objects as mentioned in the below diagram. Click Save.

Milestone 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 peoplein your Salesforce organization can have to data. Simplyput, it describeswhat a user could see within the Salesforce organization.

Activity 1: Creating Owner Role

Creating Owner Role:

- a. Go to Quick Find → search for Roles → click on Set Up Roles.
- b. Click on Expand All and click on Add Role under whom this role works.

C. Give Label as "Owner" and Role Name gets auto-populated. Then click on Save.

d. Click and save it.

Activity 2: Creating Employer Roles

Creating Another Two Roles Under Manager:

e. Go to Quick Find → search for Roles → click on Set Up Roles.

f. Click the plus on CEO role, and click Add Role under Owner.

g. Give Label as "Employer" and Role Name gets auto-populated. Then click on Save.

h. Repeat the same steps for another role.

i. Click the plus on CEO role, and click the plus on Owner, and click Add Role under Employer.

j. Give Label as "Worker" and Role Name gets auto-populated. Then click on Save.

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

- Header:** Welcome to Salesforce: Verify, Roles | Salesforce, Student - Skill Wallet, SI-9368-1736163904.
- Left Navigation:** Setup, Home, Object Manager. Under Users, Roles is selected.
- Search Bar:** Search Setup, roles.
- Content Area:** Title: Creating the Role Hierarchy. Subtitle: You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.
- Role Hierarchy Tree:**
 - NA
 - Add Role
 - CEO
 - Add Role
 - CFO
 - COO
 - owner
 - employer
 - worker
 - SVP Customer Service & Support
 - SVP Human Resources
 - SVP Sales & Marketing
- Buttons:** Help for this Page, Show in tree view.

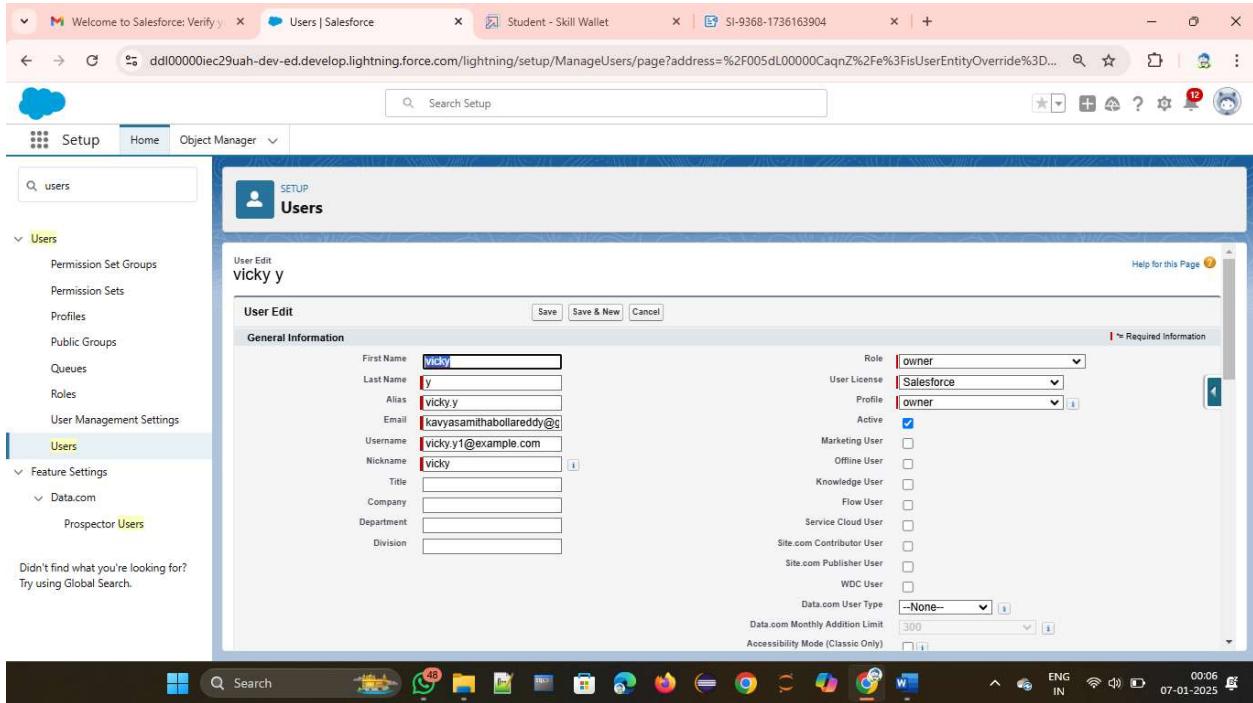
Milestone 9: Users

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.

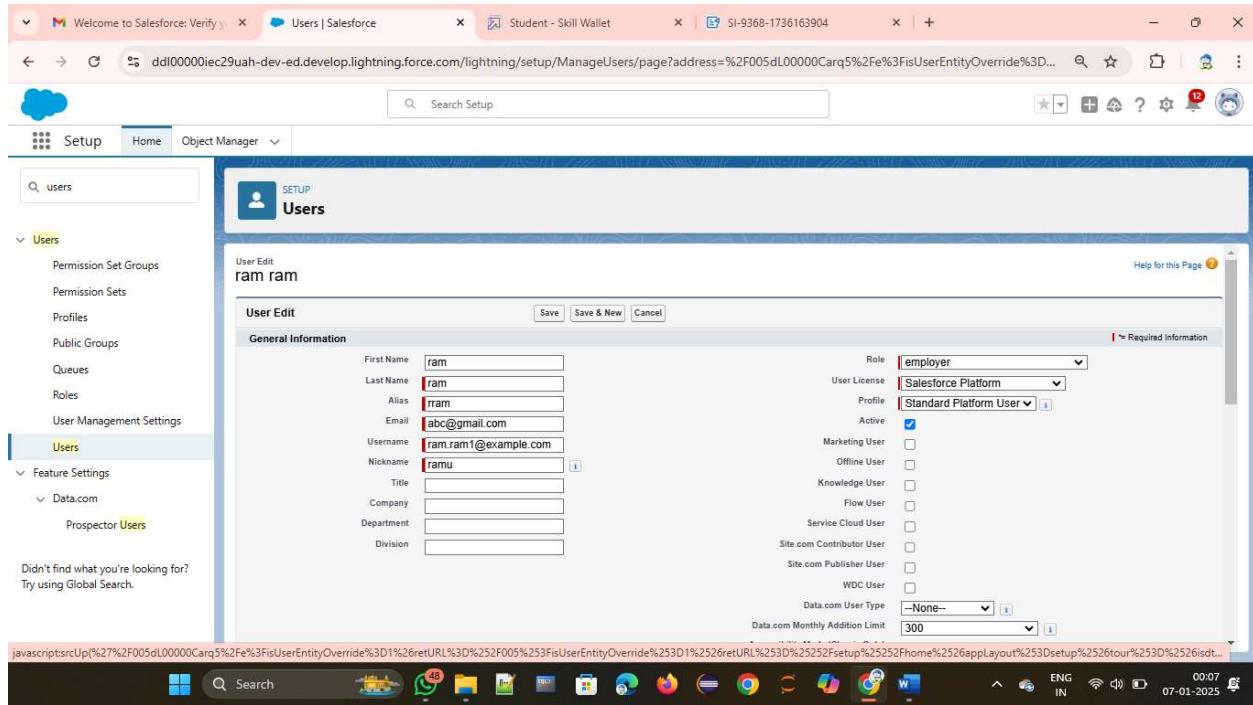
Activity 1: Create User

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



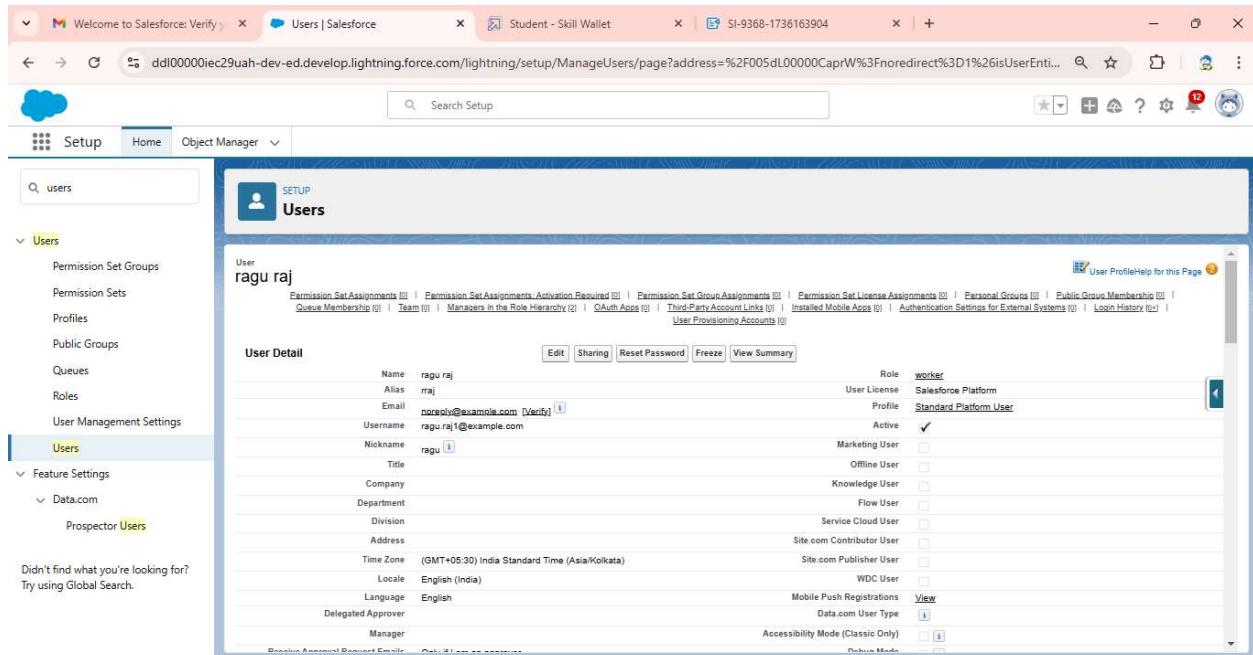
Activity 2: Creating Another User

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



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

b. Fill in the fields:



Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Bollareddy, Kavya Samitha	Kball	bksr@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d000000ec29uah.zmahy5fu4nn8@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	ragu_ragu	ragu	ragu.ragu@example.com	worker	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	ram_ram	rram	ram.ram1@example.com	employer	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	User_Integration	integ	integration@00d000000ec29uah.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sas	insightsecurity@00d000000ec29uah.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>	vicky_vicky	vicky.v	vicky.v1@example.com	owner	<input checked="" type="checkbox"/>	owner

Milestone 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.

Activity 1: Creating OWD Setting

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

Extra Information:

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.

Milestone 11: Reports

- a. Go to the app → click on the Reports tab.
- b. Click New Report.
- c. Select for Report Type, search for “Rice Mill with Consumers”, click on it, and click Start Report.
- d. The outlinepane is opened already, select the fields that are mentioned below in the Column section:
 - i. Consumer Name
 - ii. Rice Type
 - iii. Rice Price/kg
 - iv. Mode of Payment
 - v. Amount Paid
- e. Remove the unnecessary fields.
- f. Select the field that is mentioned below in the Group Rows section:
 - i. Rice Taken by Shops
- g. Click Save and Run .
- h. Save the report as “Range of Amount per Day”.

- i. Save it.

Activity 2: Sharing Report to Owner

- a. Click on the report to open it.
- b. Click the Edit dropdown menu and select the Subscribe option.
- c. After selecting to run the report as "Another Person," select your personal account or the person you want to send the email to.
- d. Click Save.
- e. Note: The owner gets a daily email notification of the Rice Mill reports so that they can see all data remotely.

Activity 3: Create a Report Folder

Steps to Create a Report Folder:

- i. Click on the App Launcher and search for "Reports".
- ii. Double-click on "Reports". The "Reports tab" will be auto-populated in the navigation bar.
- iii. Click on the "Reports" tab, then click on New Folder.
- iv. Give the Folder Label as "Estimated Rice per Day". The Folder Unique Name will be auto-populated.
- v. Click Save.

Moving a Report to the New Folder:

- vi. Navigate to the App Launcher and click on Reports.
- vii. Click All Reports.
- viii. Select the "Range of Amount per Day" report from the dropdown menu.
- ix. Click Move.
- x. Select the "Estimated Rice per Day" folder and click Select.

The screenshot shows two separate Salesforce Lightning pages:

- Recently Viewed | consumers**: A list of 13 recently viewed consumer records. The records are numbered 1 through 13 and listed as "consumers-011" through "consumers-001".
- Analytics | Salesforce**: An Analytics report titled "Report: rice mills with consumers range of amount per day". The report table displays 10 records of rice purchases, showing details like consumer name, rice type, price/kg, mode of payment, and amount paid.

Recently Viewed | consumers Data:

Rank	Consumer Name
1	consumers-011
2	consumers-012
3	consumers-013
4	consumers-010
5	consumers-009
6	consumers-008
7	consumers-007
8	consumers-006
9	consumers-005
10	consumers-004
11	consumers-003
12	consumers-002
13	consumers-001

Analytics | Salesforce Report Data:

Consumer Name	Rice Type	rice price/kg	Mode of payment	Amount Paid
consumers-002	normal rice	10	Debit card	100.00
consumers-004	basmati	10	Credit card	100.00
consumers-003	basmati	10	Debit card	100.00
consumers-010	basmati	10	Debit card	100.00
consumers-001	basmati	10	UPI	100.00
consumers-005	normal rice	10	Cash	100.00
consumers-007	basmati	10	Net banking	100.00
consumers-008	normal rice	10	Cash	100.00
consumers-009	basmati	10	Net banking	100.00
consumers-012	normal rice	78	Debit card	780.00

Milestone 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.

Activity 1: Create Dashboard Folder

Steps to Create a Dashboard Folder:

- i. Click on the App Launcher and search for "Dashboard".
- ii. Click on the Dashboard tab.
- iii. Click New Folder.
- iv. Give the Folder Label as "Amount Data Dashboard".
- v. Folder UniqueName will be auto-populated.
- vi. Click Save.

The screenshot shows the Salesforce Lightning interface. The top navigation bar includes tabs for 'Welcome to Salesforce: Verify', 'All Folders | Dashboards | Sales', 'Student - Skill Wallet', and 'SI-9368-1736163904'. Below the navigation is a search bar and a toolbar with various icons. The main content area displays a list of dashboards and folders. On the left, there's a sidebar with sections for 'Dashboards', 'All Folders' (which is selected), 'Folders', and 'Favorites'. The main table lists three dashboards under 'DASHBOARDS': 'Recent', 'Created by Me', and 'Private Dashboards'. Under 'FOLDERS', there's a section for 'All Folders' which is also selected. This section contains 'Created by Me' and 'Shared with Me' options. The table has columns for Name, Created By, Created On, Last Modified By, and Last Modified Date. The 'amount_data_dashboard' is listed under 'Created by Me'.

DASHBOARDS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	amount_data_dashboard	Kavya Samitha Bollareddy	6/1/2025, 4:48 pm	Kavya Samitha Bollareddy	6/1/2025, 4:48 pm
Created by Me	Enablement Dashboard Spring '24	Automated Process	5/1/2025, 6:38 pm	Automated Process	5/1/2025, 6:38 pm
Created by Me	Enablement Dashboard Summer '24	Automated Process	5/1/2025, 6:38 pm	Automated Process	5/1/2025, 6:38 pm

Activity 2: Create Dashboard

- i. Go to the App → click on the Dashboards tab.
- ii. Give a Name and select the folder that was created, and click Create.
- iii. Select Add Component.
- iv. Select a Report and click Select.

First ComponentDetails:

- v. Display as: Vertical Bar Chart

- vi. X-axis: Rice Taken by Shops
- vii. Y-axis: Sum of Amount
- viii. Y-axis Range: Automatic
- ix. Sort by: Rice Taken by Shops
- x. Component Theme: Dark

SecondComponent Details:

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

