A CRM APPLICATION FOR WHOLESALE RICE MILL

By

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Project Abstract

Introduction:

This project involves the development of a CRM application on the Salesforce platform tailored for wholesale rice mills. The application aims to enhance operational efficiency, improve data accuracy, and support strategic decision making by integrating consumer management, inventory tracking, sales processing, and financial reporting into a single platform

Objective:

To provide a centralized and user-friendly CRM system that streamlines core business processes, enhances customer relationship management, optimizes inventory levels, ensures accurate sales tracking, and facilitates comprehensive financial reporting.

Key Features:

1. Consumer Management:
- Detailed consumer profiles with fields like name, contact details, rice taken, and payment methods.
2. Rice Inventory Management:
- Track rice types, quantities, prices, and supplier information.
3. Sales Tracking:
- Record sales transactions including consumer details, rice types, quantities, and total amounts.
4. Payment Processing:
- Record payments with details such as amount paid, payment date, and mode of payment.
5. Reporting and Analytics:
- Generate detailed reports and dashboards on consumers, sales, payments, and inventory.

Conclusion:

The CRM application for wholesale rice mills harnesses Salesforce's capabilities to transform traditional operations. By integrating key business functions into a cohesive system, it enables rice mill businesses to operate efficiently, make informed decisions, and achieve sustainable

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Topics

pageno

INTRODUCTION

In today's competitive landscape, wholesale rice mills must navigate complex operations and maintain high levels of efficiency to remain successful. Effective management of consumer relationships, inventory, sales, and financial transactions is crucial to achieving this goal. However, traditional methods of managing these processes are often cumbersome, error-prone, and time-consuming.

This project introduces a cutting-edge CRM (Customer Relationship Management) application built on the Salesforce platform, specifically designed to address the unique needs of wholesale rice mills. The application aims to provide a centralized, user-friendly platform that streamlines and automates core business processes, significantly enhancing operational efficiency and data accuracy.

The CRM application focuses on several key areas:
1.Consumer Management: It enables the rice mill to maintain comprehensive profiles for each consumer, capturing essential information such as contact details, rice purchases, payment methods, and more. This facilitates improved customer service and strengthens consumer relationships.

2.Rice Inventory Management: The application provides robust tools for tracking rice inventory, including details on rice types, quantities available, pricing, and supplier information. This ensures optimal stock levels and efficient inventory management, preventing both shortages and overstocking.

3.Sales Tracking: The system meticulously records all sales transactions, linking them to the appropriate consumers and inventory items. This allows for precise sales monitoring, trend analysis, and revenue tracking, offering valuable insights into business performance.

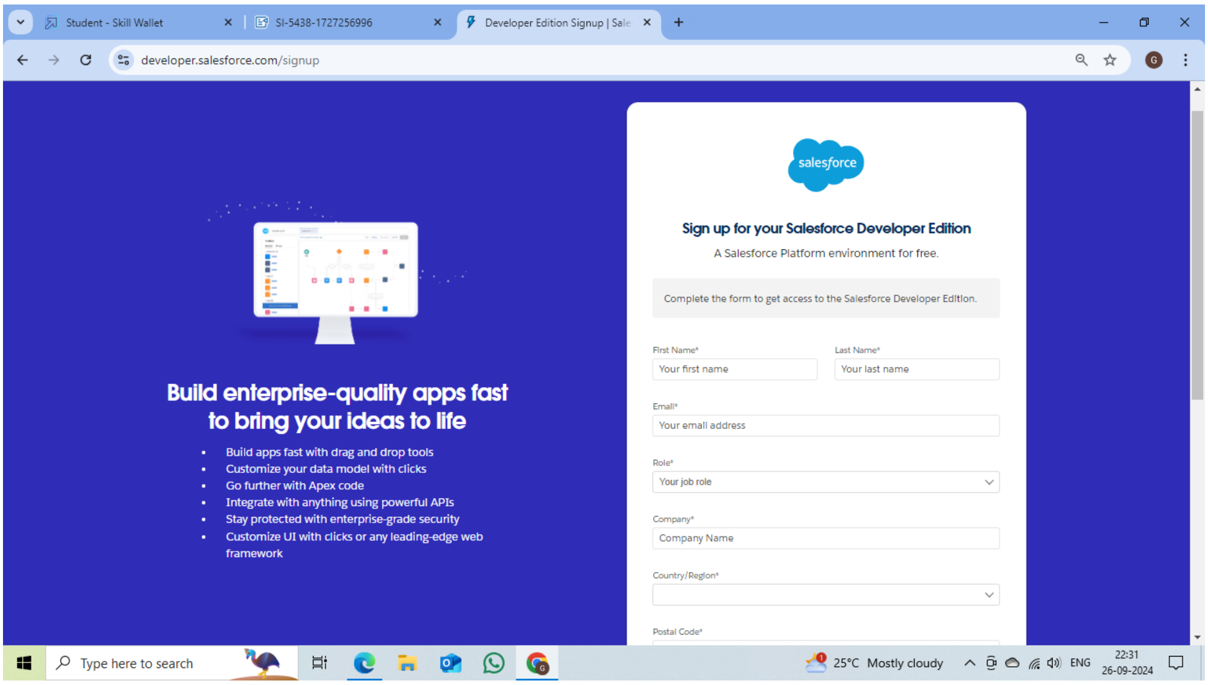
4.Payment Processing: Accurate tracking of payments is crucial for financial health. The application records all payment details, ensuring timely and accurate financial reconciliation and facilitating smooth financial operations.

5.Reporting and Analytics: Comprehensive reporting capabilities allow for the generation of detailed reports and dashboards, covering various aspects of the business. These insights support data-driven decision-making and strategic planning, helping the rice mill to identify opportunities for improvement and growth.

Task 1:

Creating Developer Account

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



1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

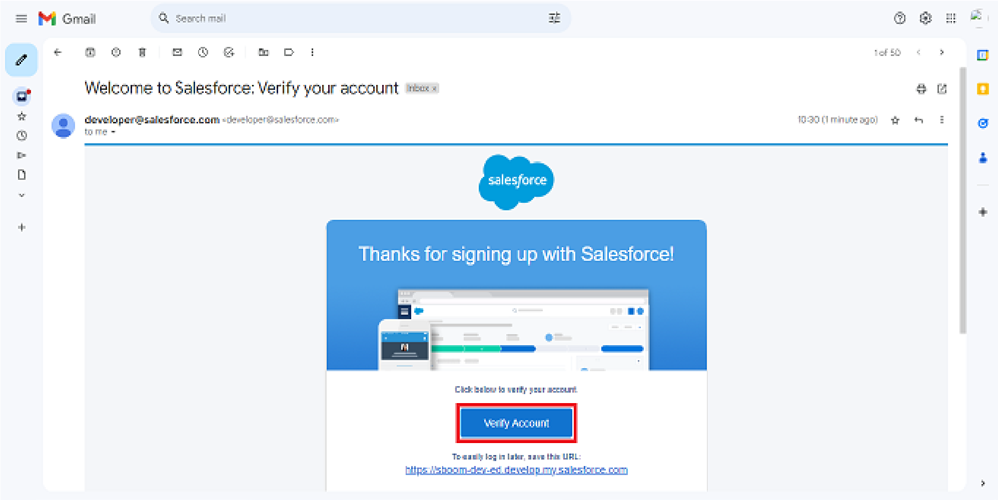
This need not be an actual email id, you can give anything in the format : username@organization.com

Click on sign me up after filling these.

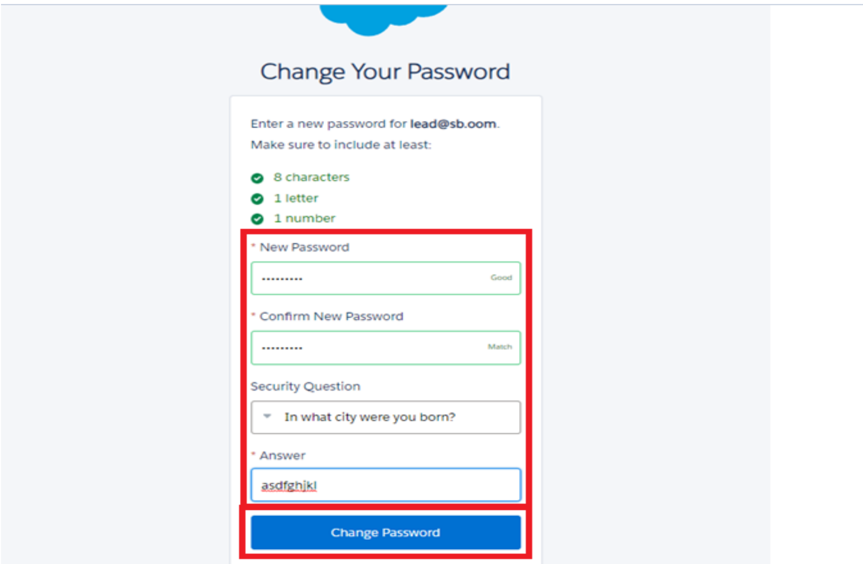
Task-2

Account Activation

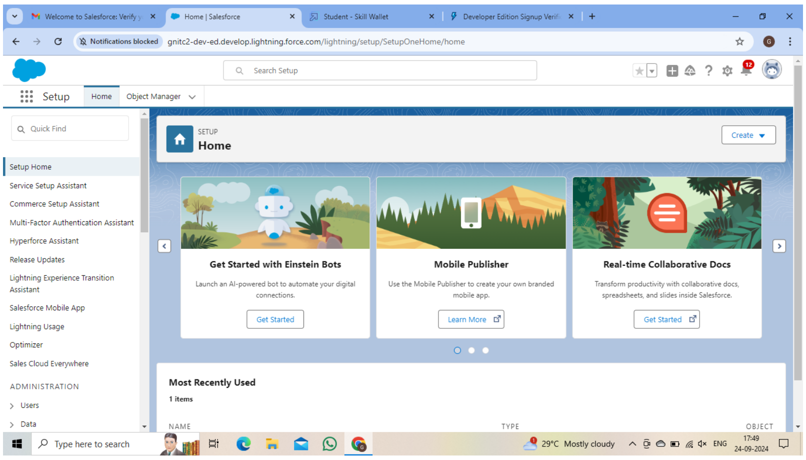
1.Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.



4.Then you will redirect to your salesforce setup page.

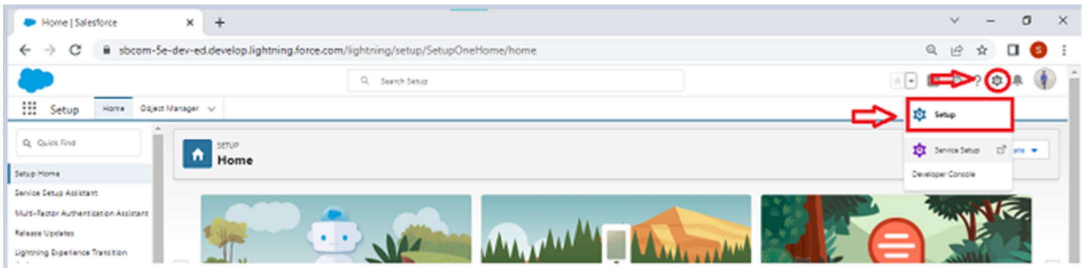


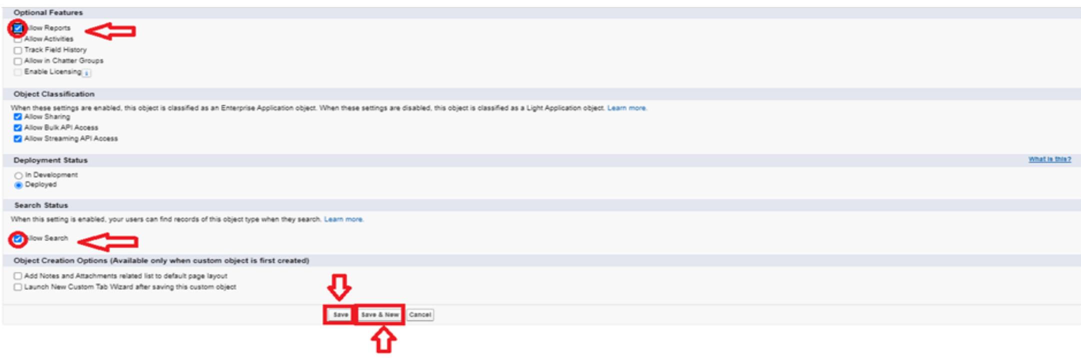
Task 3:

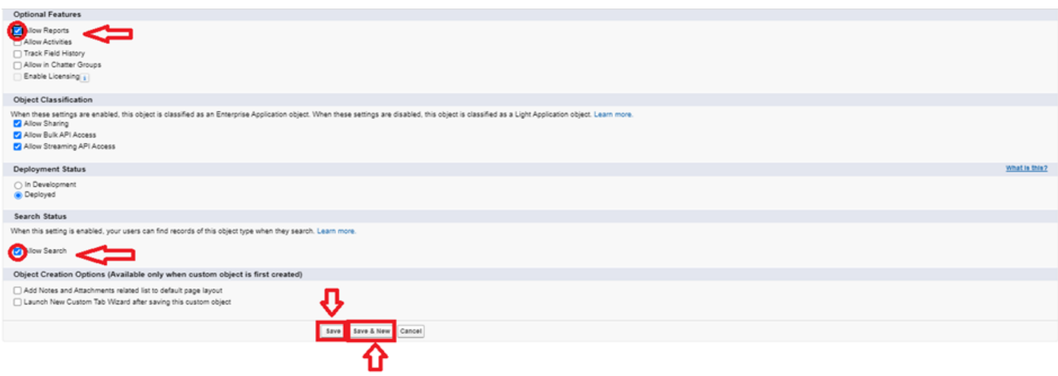
Create Supplier Object

To create an object:

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







Task 4:

Create Rice mill Object To create an object:

1. From the setup page >> Click on Object Manager>>Click on Create >> Click on Custom Object.
1. Enter the label name>>rice mill
2. Plural label name>> rice mills
3. Enter Record Name Label and Format

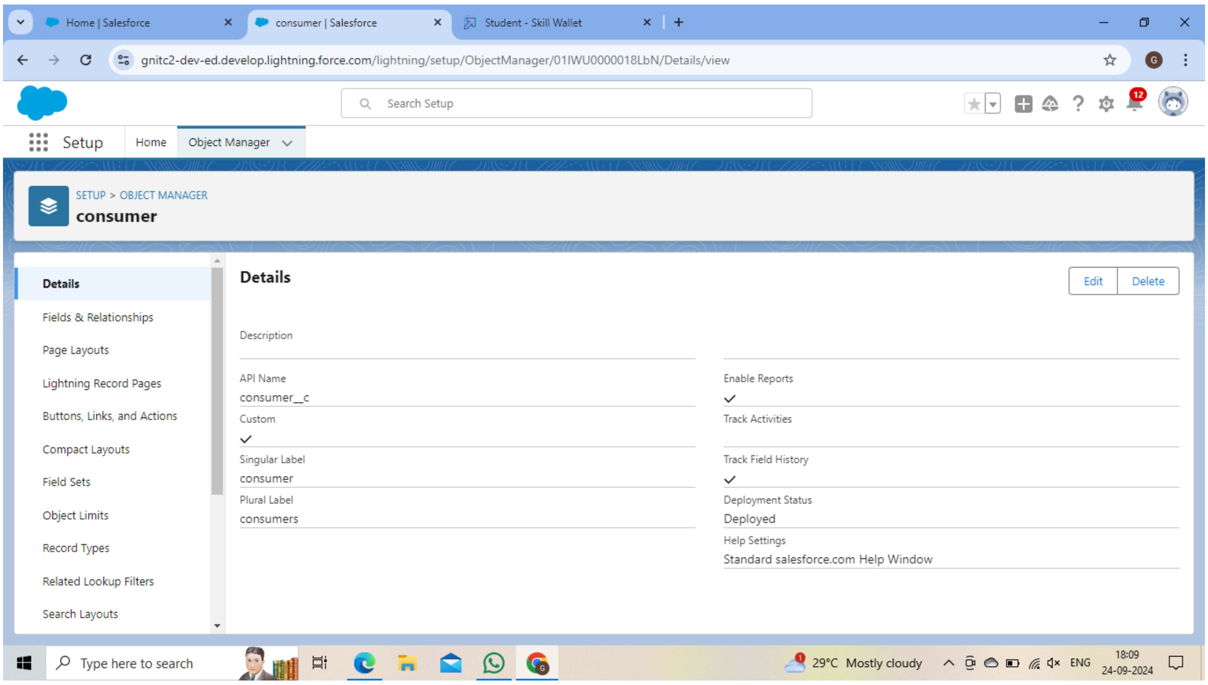
- Record Name >>
- Data Type >> Auto Number
- Display Format >> rice-{000}
- Starting number >> 1

2. Click on Allow reports and Track Field History, Allow Search and save

Task 5:

Create consumer Objects

1. From the setup page >> Click on Object Manager>>Click on Create >> Click on Custom Object.
1. Enter the label name>>consumer
2. Plural label name>> consumers
3. Enter Record Name Label and Format
 ● Record Name >>
● Data Type >> Auto Number
● Display Format >> consumers-{000}
 ● Starting number >> 1
2. Click on Allow reports and Track Field History, Allow Search and Save



Task 6:

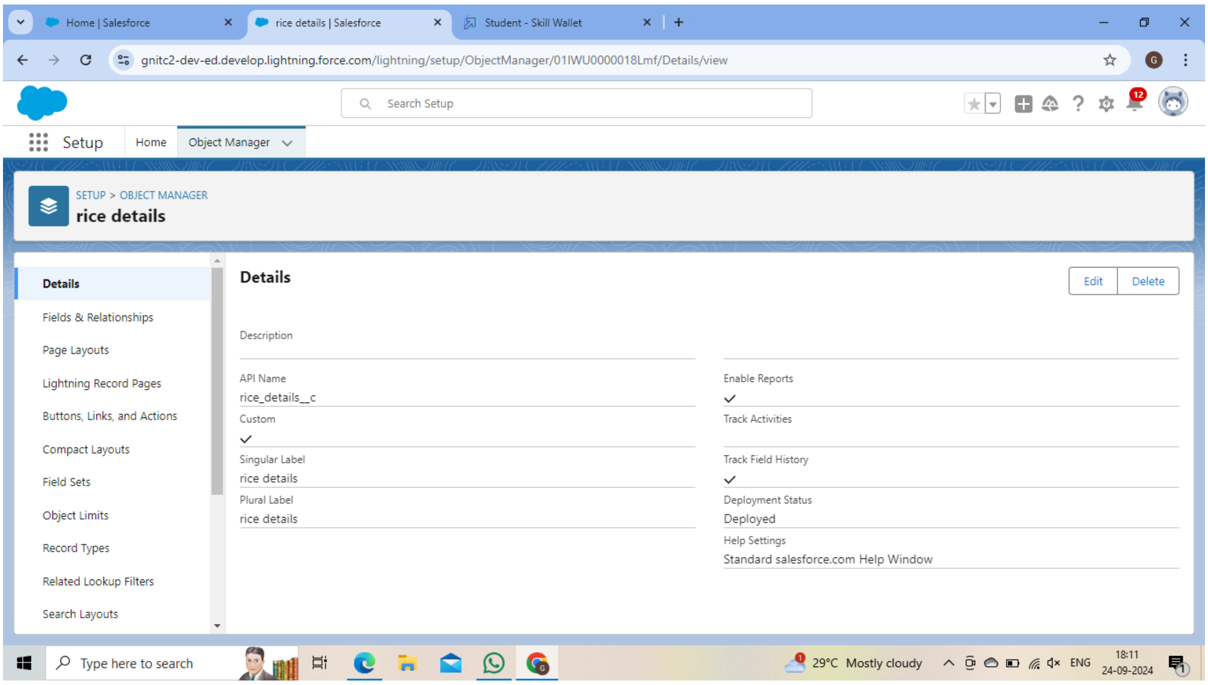
Create rice details Objects

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

1. Enter the label name>>rice details
2. Plural label name>> rice details
3. Enter Record Name Label and Format

● Record Name >>
● Data Type >> Auto Number
● Display Format >> rice-{000}
● Starting number >> 1

2. **Click on Allow reports and Track Field History, Allow Search and Save.**

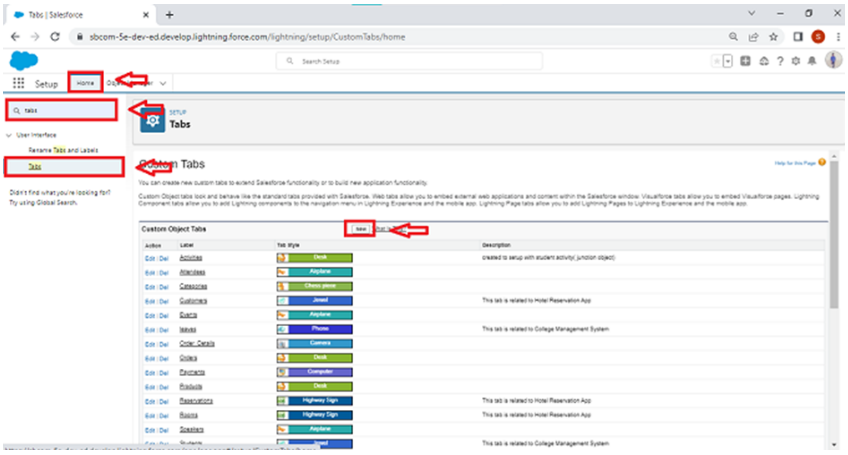


Task 7:

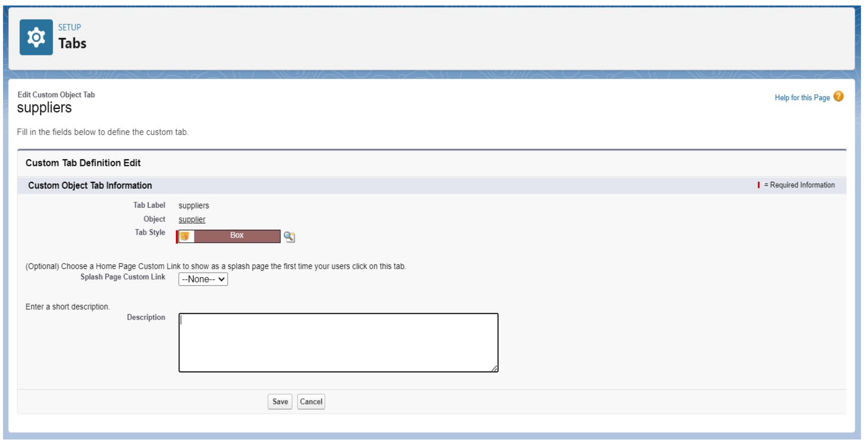
Creating a Custom Tab

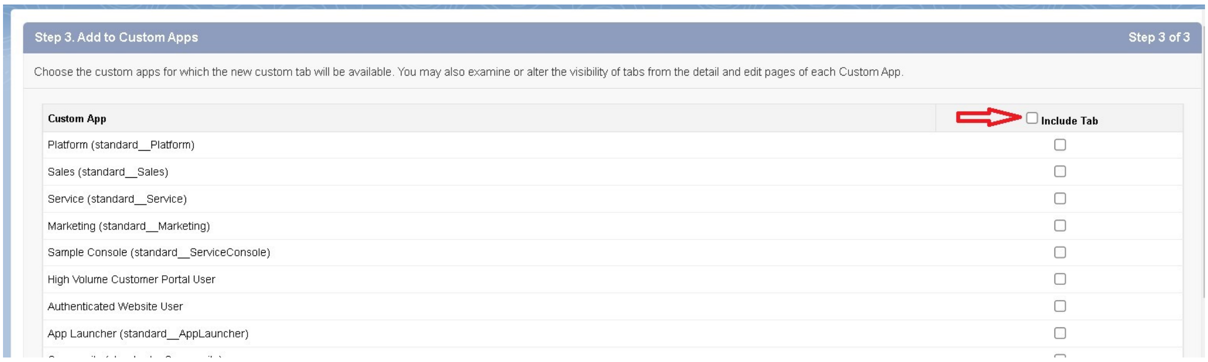
To create a Tab:(supplier)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)

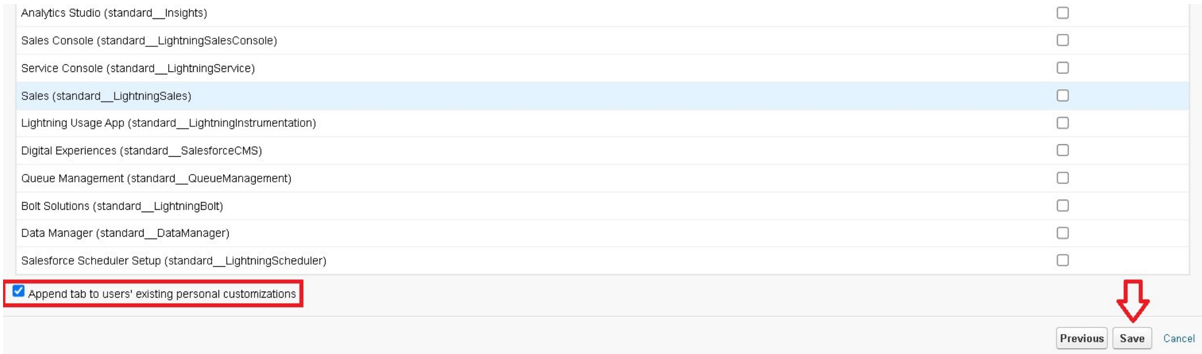


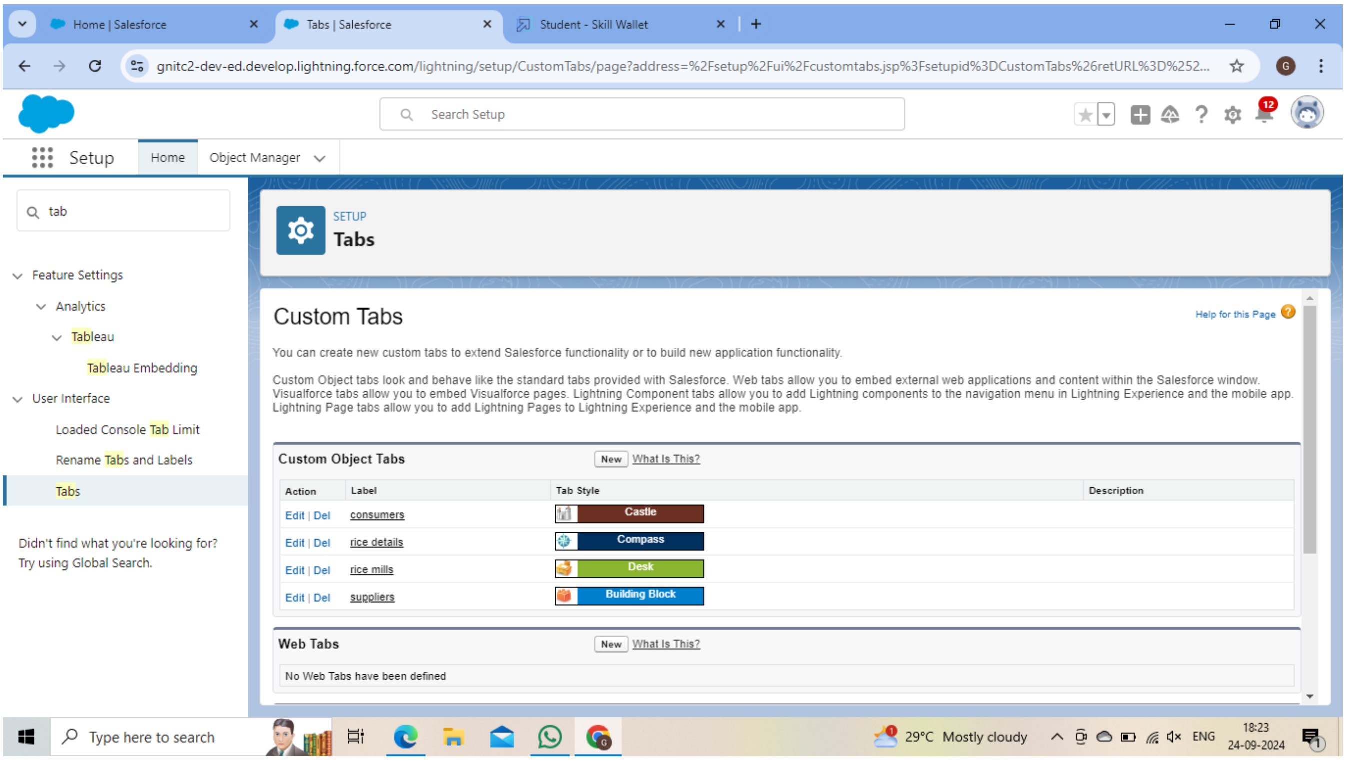
2. Select Object(supplier) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.




Step 3. Add to Custom Apps
Step 3 of 3
Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.
Custom App
Include Tab
Platform (standard__Platform)
Sales (standard__Sales)
Service (standard__Service)
Marketing (standard__Marketing)
Sample Console (standard__ServiceConsole)
High Volume Customer Portal User
Authenticated Website User
App Launcher (standard__AppLauncher)


Step 3. Add to Custom Apps
Step 3 of 3
Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.
Custom App
Include Tab
Platform (standard__Platform)
Sales (standard__Sales)
Service (standard__Service)
Marketing (standard__Marketing)
Sample Console (standard__ServiceConsole)
High Volume Customer Portal User
Authenticated Website User
App Launcher (standard__AppLauncher)


Analytics Studio (standard__Insights)
Sales Console (standard__LightningSalesConsole)
Service Console (standard__LightningService)
Sales (standard__LightningSales)
Lightning Usage App (standard__LightningInstrumentation)
Digital Experiences (standard__SalesforceCMS)
Queue Management (standard__QueueManagement)
Bolt Solutions (standard__LightningBolt)
Data Manager (standard__DataManager)
Salesforce Scheduler Setup (standard__LightningScheduler)
Append tab to users' existing personal customizations
Previous
Save
Cancel



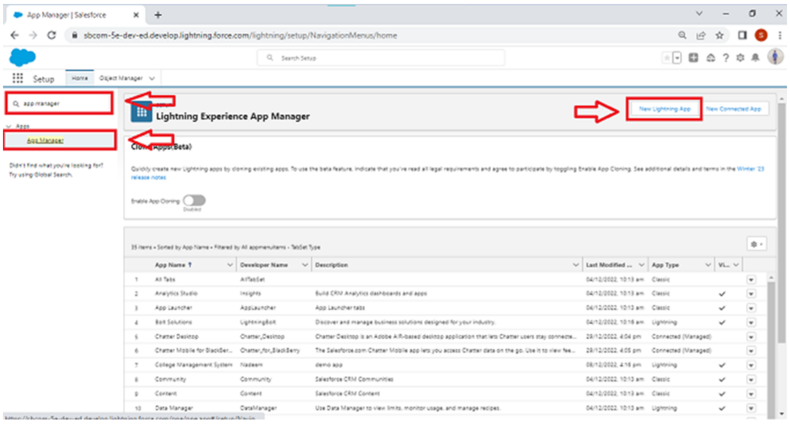
Home | Salesforce
Tabs | Salesforce
Student - Skill Wallet
gnitc2-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2Fcustomtabs.jsp%3Fsetupid%3DCustomTabs%26retURL%3D%252...
Search Setup
Setup
Home
Object Manager
tab
Feature Settings
Analytics
Tableau
Tableau Embedding
User Interface
Loaded Console Tab Limit
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
Custom Tabs
Help for this Page
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.
Custom Object Tabs
New
What Is This?
Action
Label
Tab Style
Description
Edit | Del
consumers
Castle
Edit | Del
rice details
Compass
Edit | Del
rice mills
Desk
Edit | Del
suppliers
Building Block
Web Tabs
New
What Is This?
No Web Tabs have been defined
Type here to search
29°C Mostly cloudy
ENG
18:23
24-09-2024

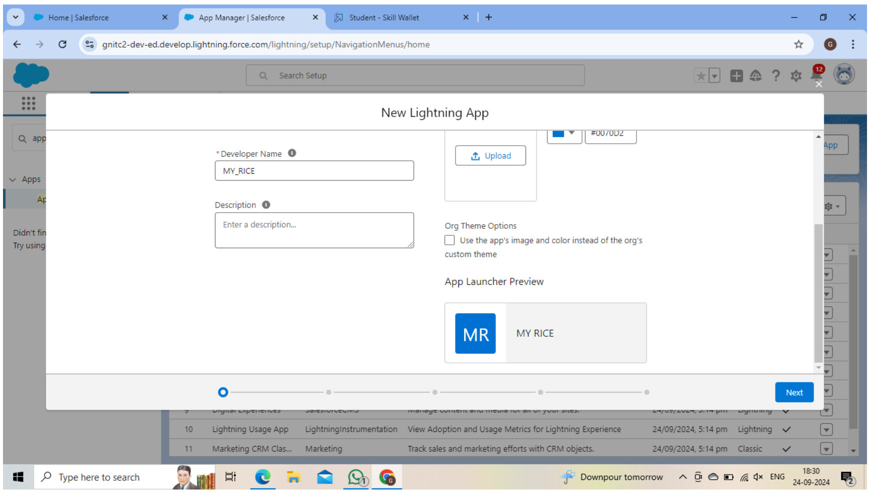
Task 9:

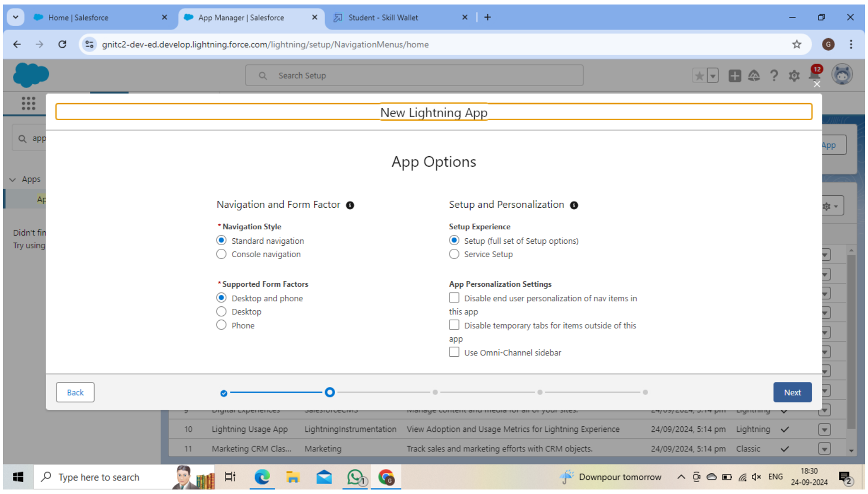
Create a Lightning App

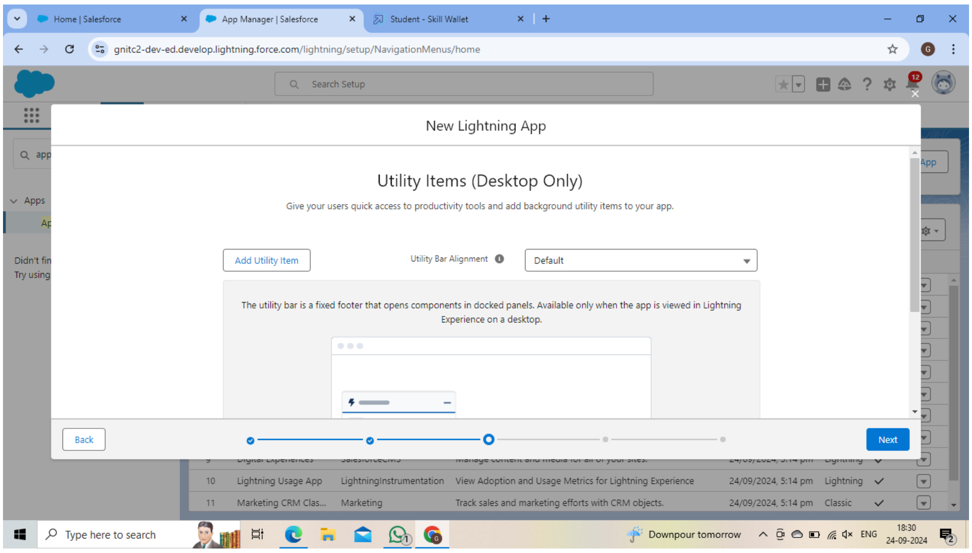
To create a lightning app page:

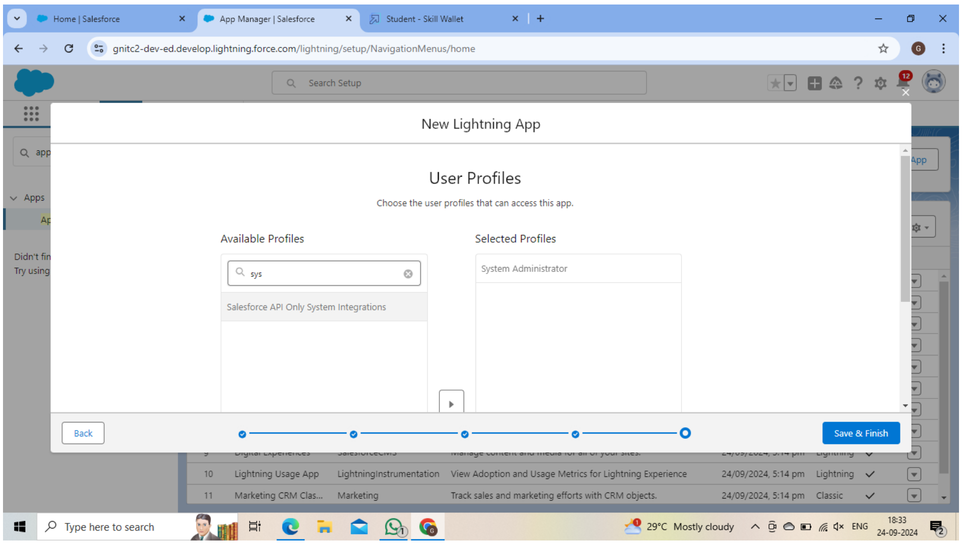
1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.

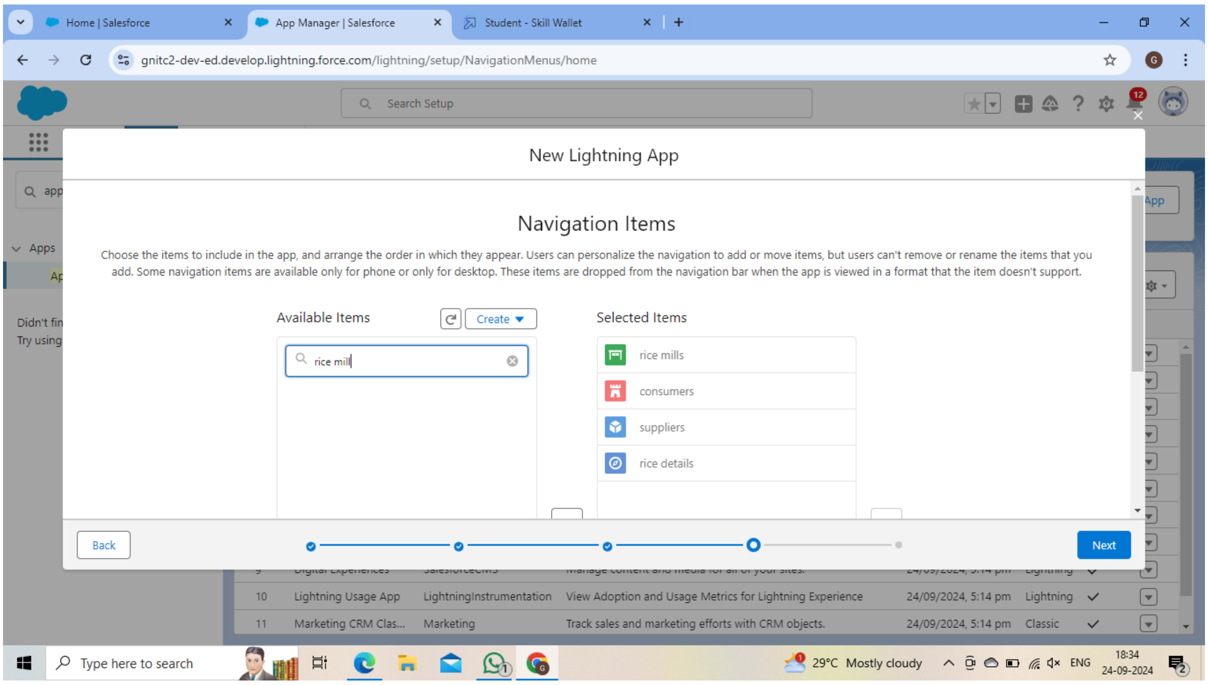





New Lightning App
App Options
Navigation and Form Factor
* Navigation Style
Standard navigation
Console navigation
* Supported Form Factors
Desktop and phone
Desktop
Phone
Setup and Personalization
Setup Experience
Setup (full set of Setup options)
Service Setup
App Personalization Settings
Disable end user personalization of nav items in this app
Disable temporary tabs for items outside of this app
Use Omni-Channel sidebar
Back
Next


New Lightning App
Utility Items (Desktop Only)
Give your users quick access to productivity tools and add background utility items to your app.
Add Utility Item
Utility Bar Alignment
Default
The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.
Back
Next


New Lightning App
User Profiles
Choose the user profiles that can access this app.
Available Profiles
sys
Salesforce API Only System Integrations
Selected Profiles
System Administrator
Back
Save & Finish

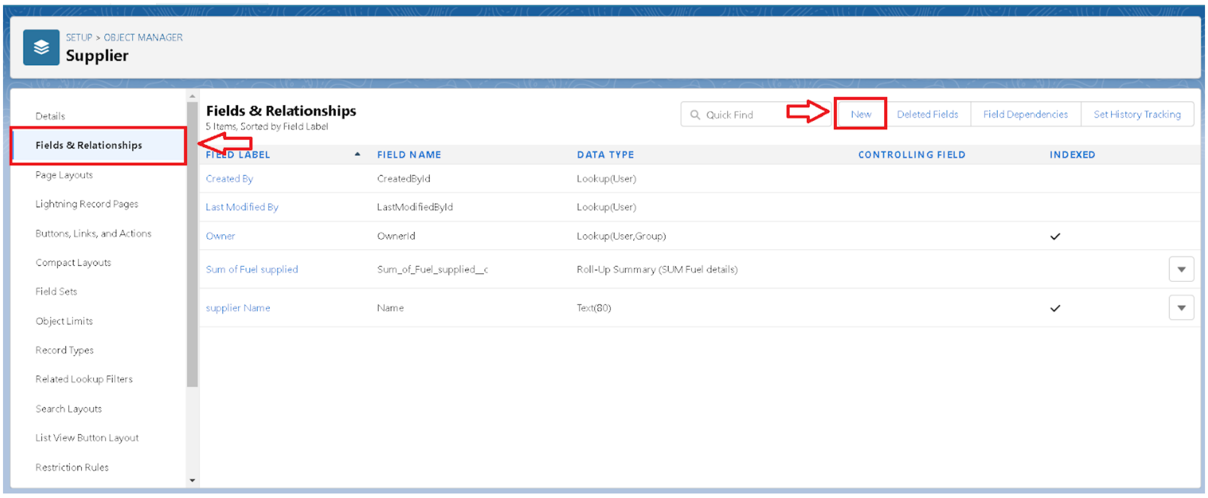

New Lightning App
Navigation Items
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
Available Items
Create
rice mill
Selected Items
rice mills
consumers
suppliers
rice details
Back
Next

Task 10:

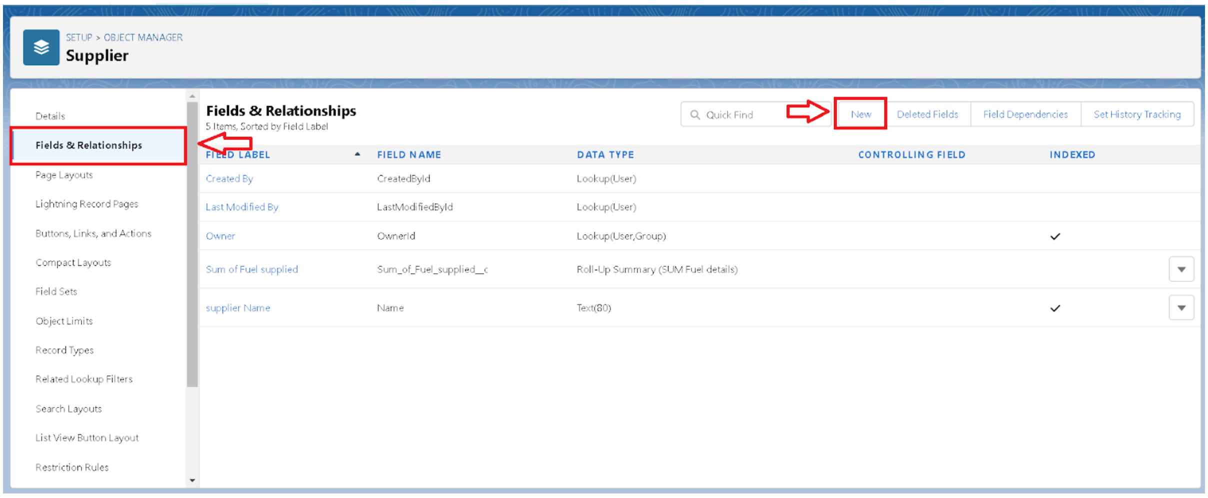
Creating the number field in rice details object

Creating the number field in rice details object

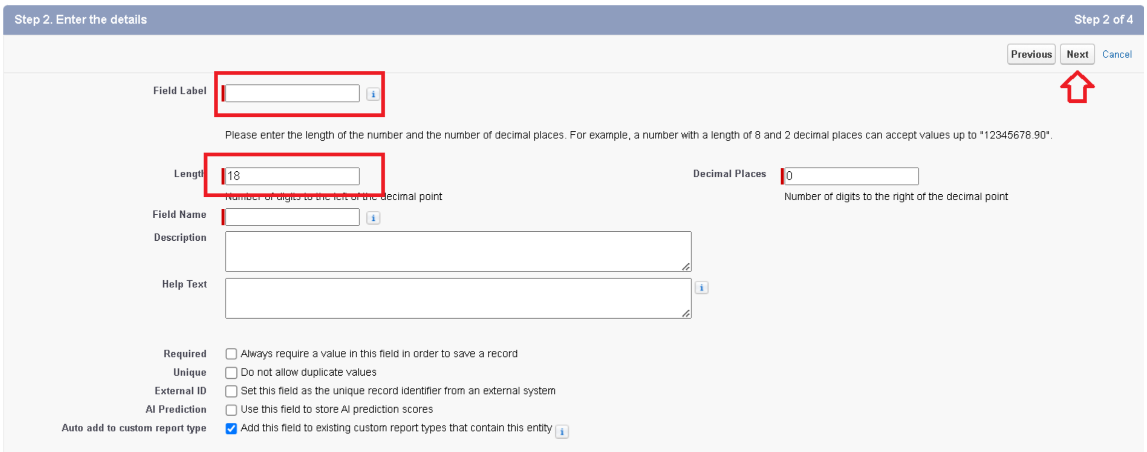
1. Go to the setup page >> click on object manager >> From drop down click edit for rice details object

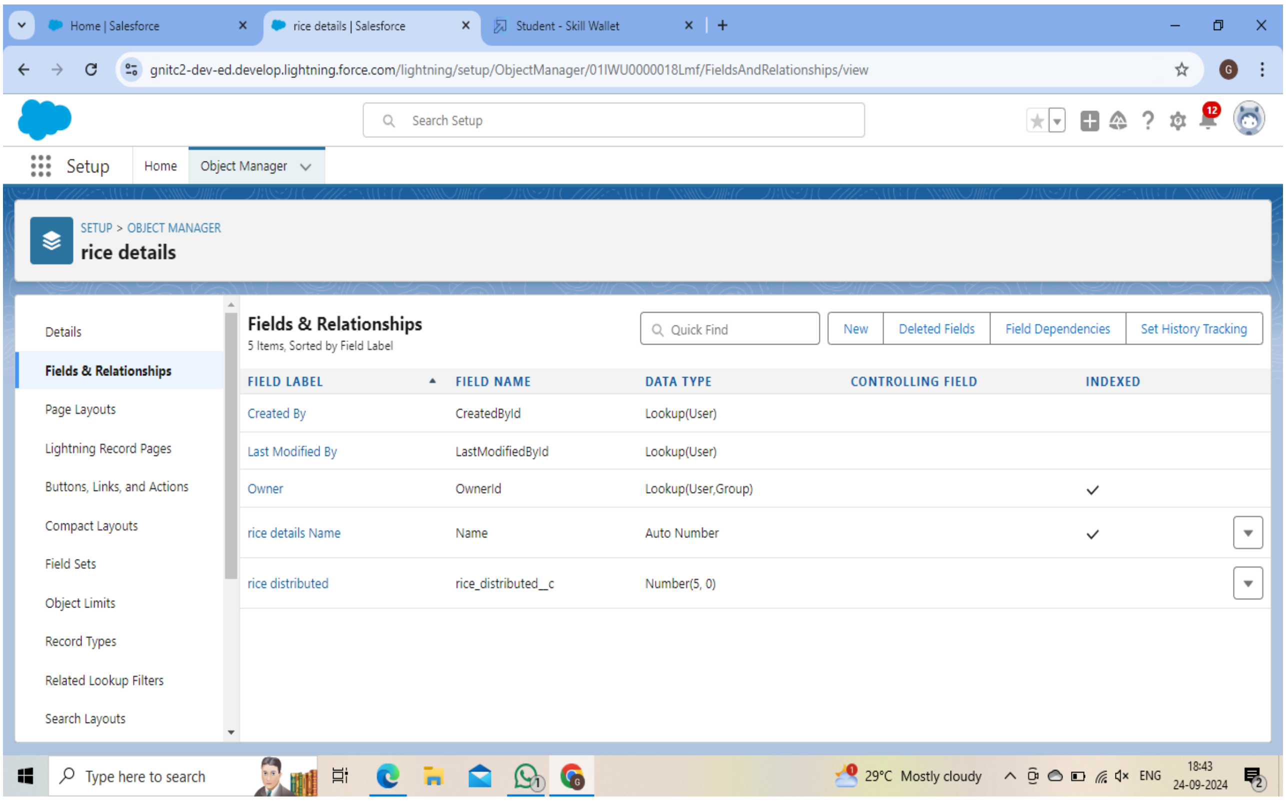


2. Click on fields & relationship >> click on New.



3. Select Data type as "Number" and click Next.
4. Given the Field Label as " rice distributed " and length as " 5 ".



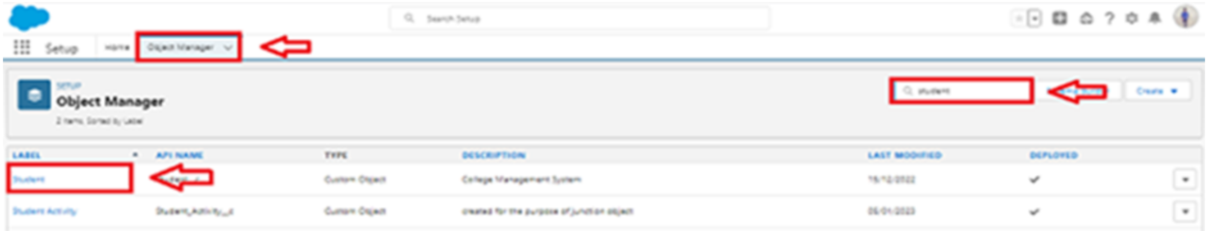


Home | Salesforce
rice details | Salesforce
Student - Skill Wallet
gnitc2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IWU0000018Lmf/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
rice details
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Fields & Relationships
5 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
rice details Name
Name
Auto Number
rice distributed
rice_distributed__c
Number(5, 0)
Type here to search
29°C Mostly cloudy
ENG
18:43
24-09-2024

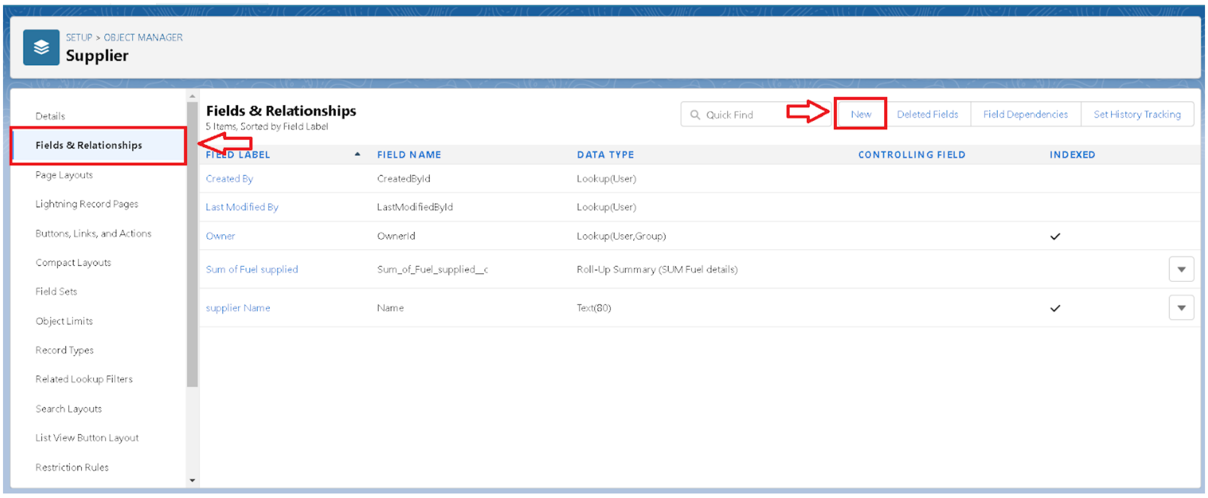
Task 11:

Creating Junction Object

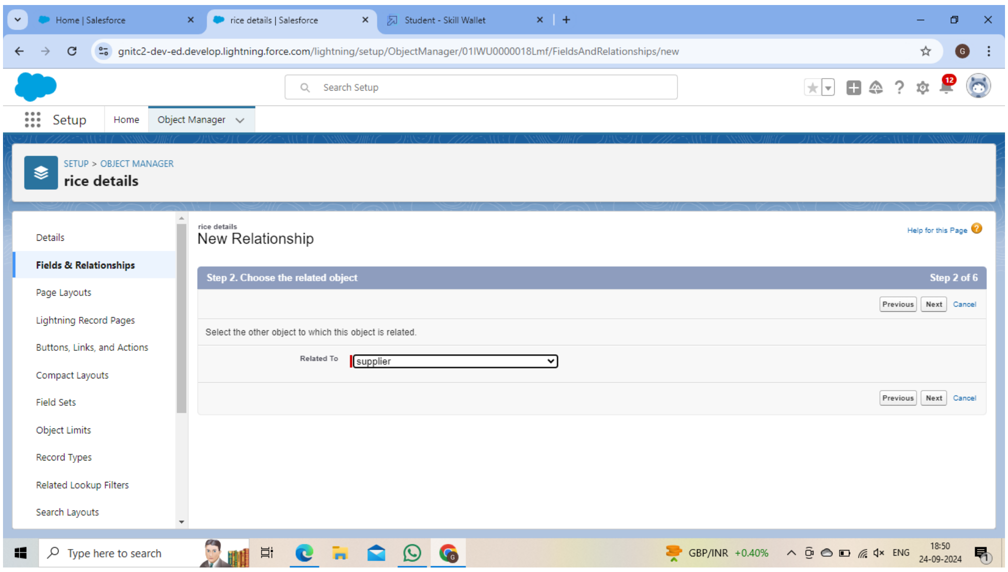
1.Go to the setup page >> click on object manager >> From drop down click edit for rice details   object



2. Click on fields & relationship - click on New.

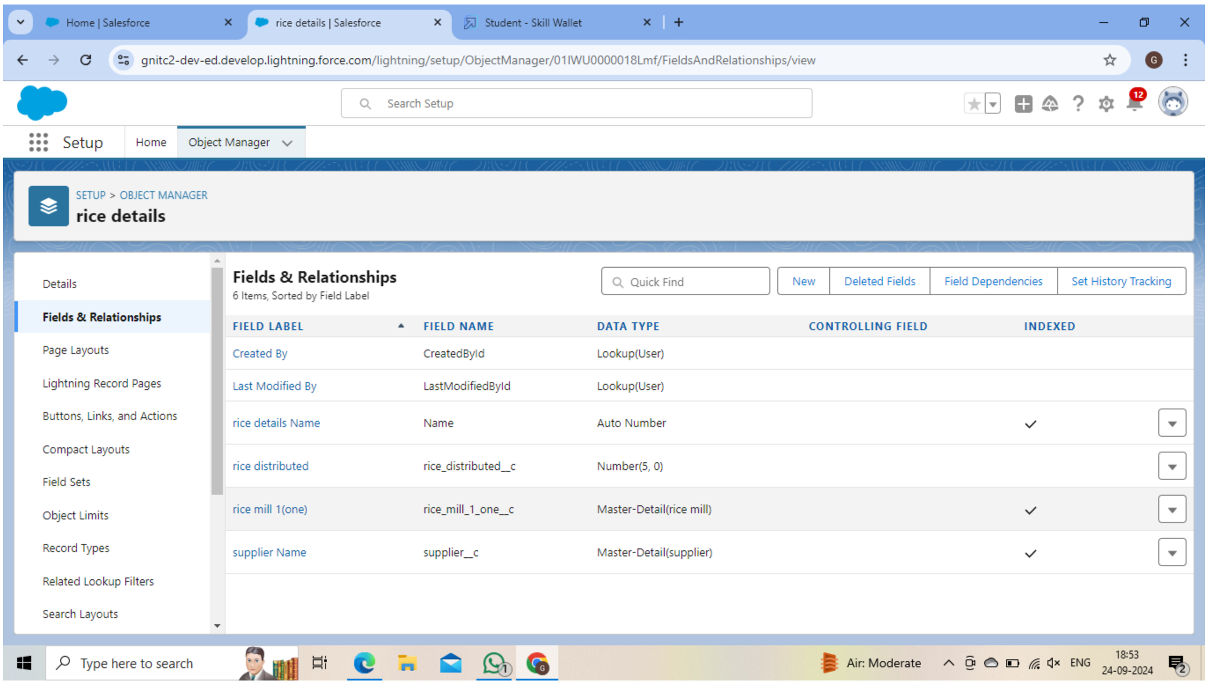


3. Select “Master-Detail relationship” as data type and click Next.



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.



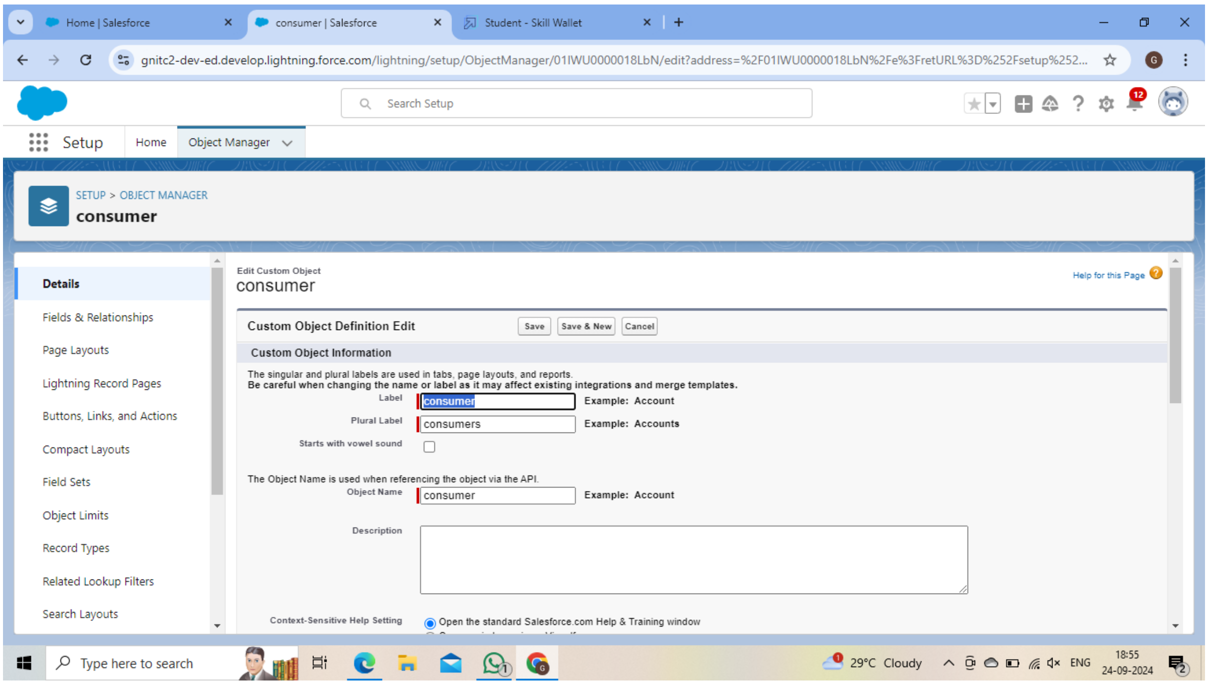
Task 12:

Creating a Master-Detail Relationship

Creating Master-Detail Relationship between consumer & rice mill Object

To Create a Master-Detail relationship

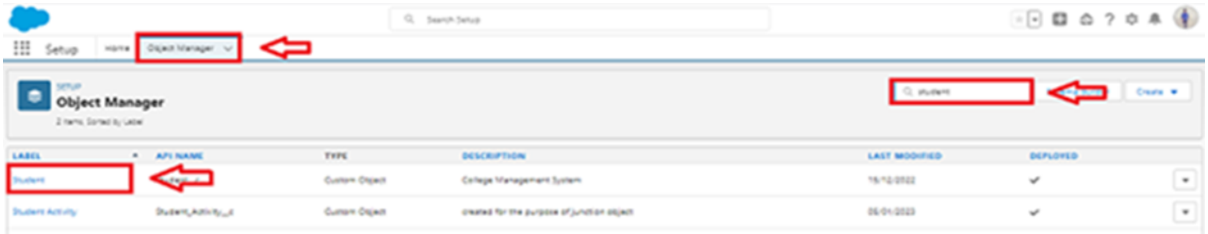
1. Go to the setup page >> click on object manager >> From drop down click edit for consumer object.
2. Click on fields & relationship >> click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. Select the related object “ rice mill”.
5. Give Field Label as “rice mill name”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



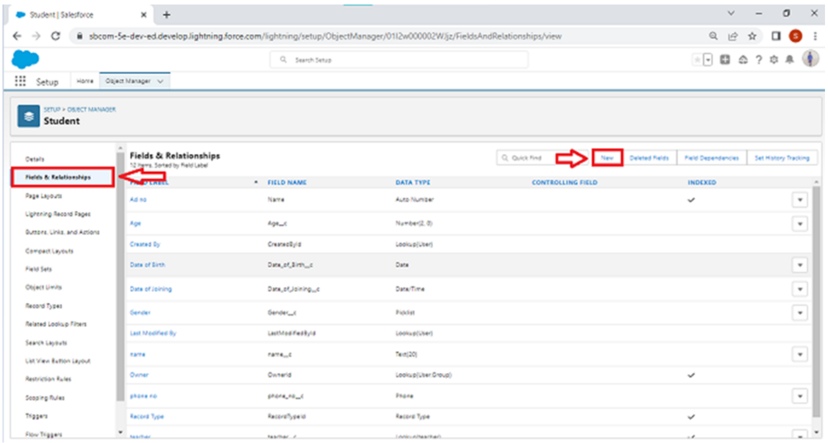
Task 13:

Creating the Roll-up Summary

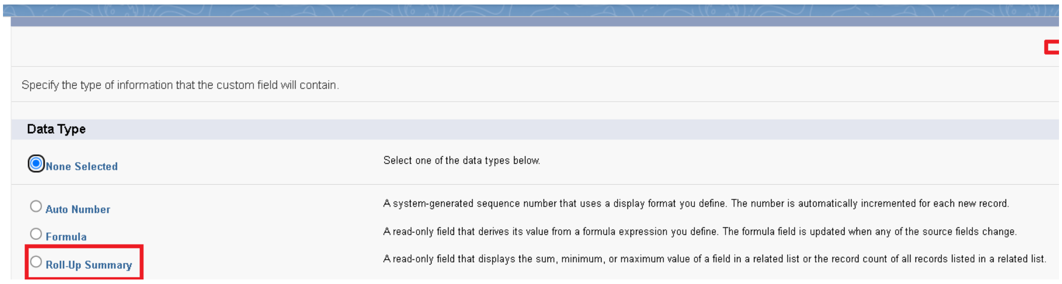
1. Go to setup >> click on Object Manager >> type object name(supplier) in search bar >> click on the object.



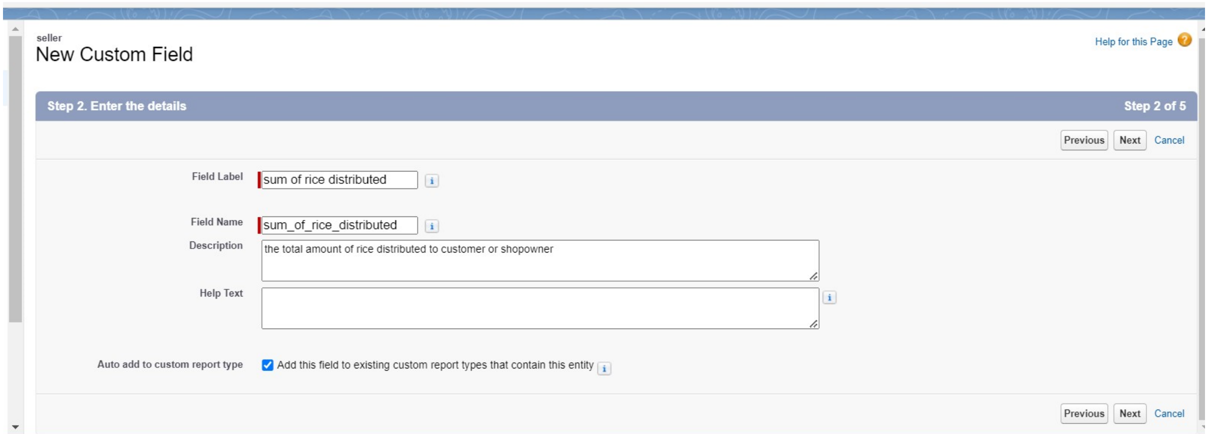
2. Now click on “Fields & Relationships” >> New



3. Select the data type as “Rollup summary ”,and click Next.

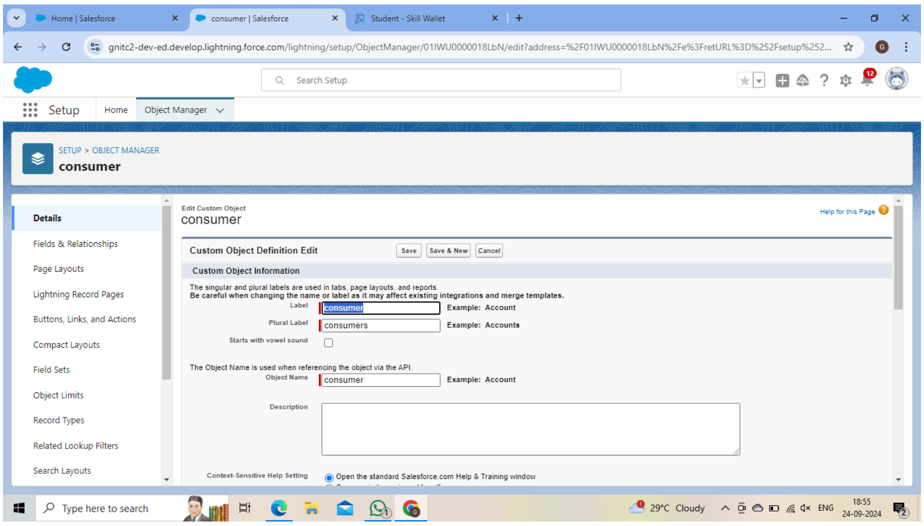


4.Give the Field label as “ sum of rice distributed ”,Field Name will be Auto generated, and click Next



.

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

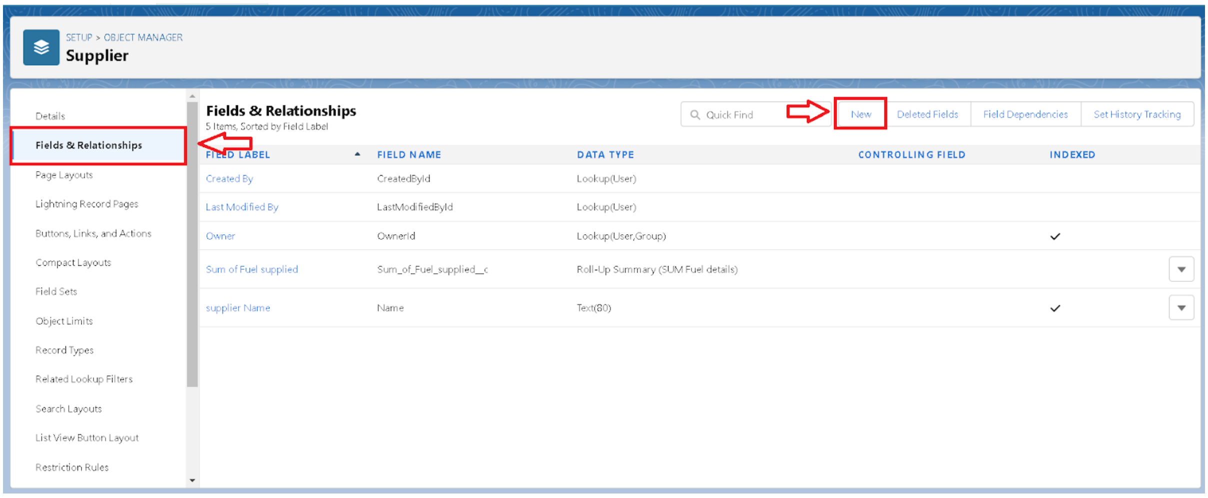


Task-14:

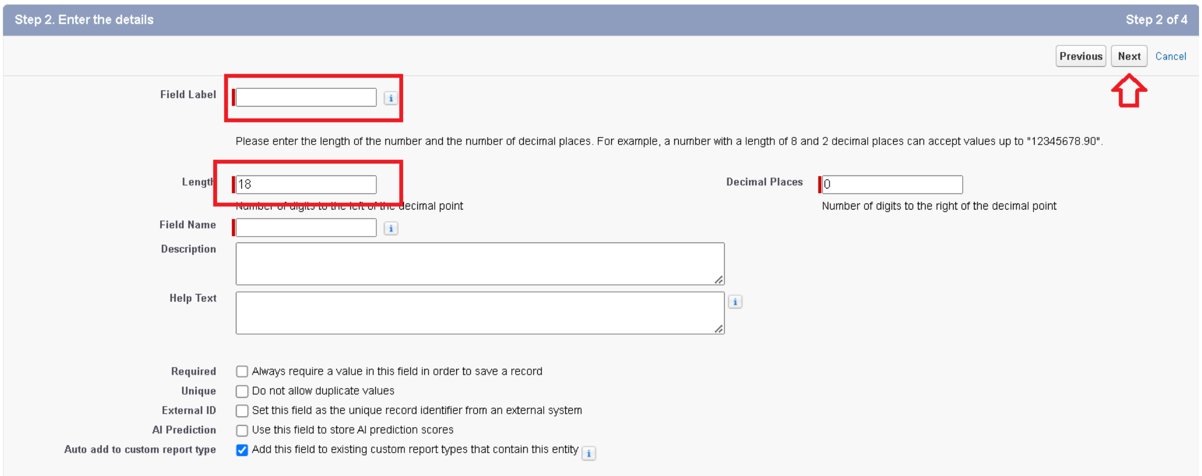
Creating Fields in Objects

Creating the number field in rice details object

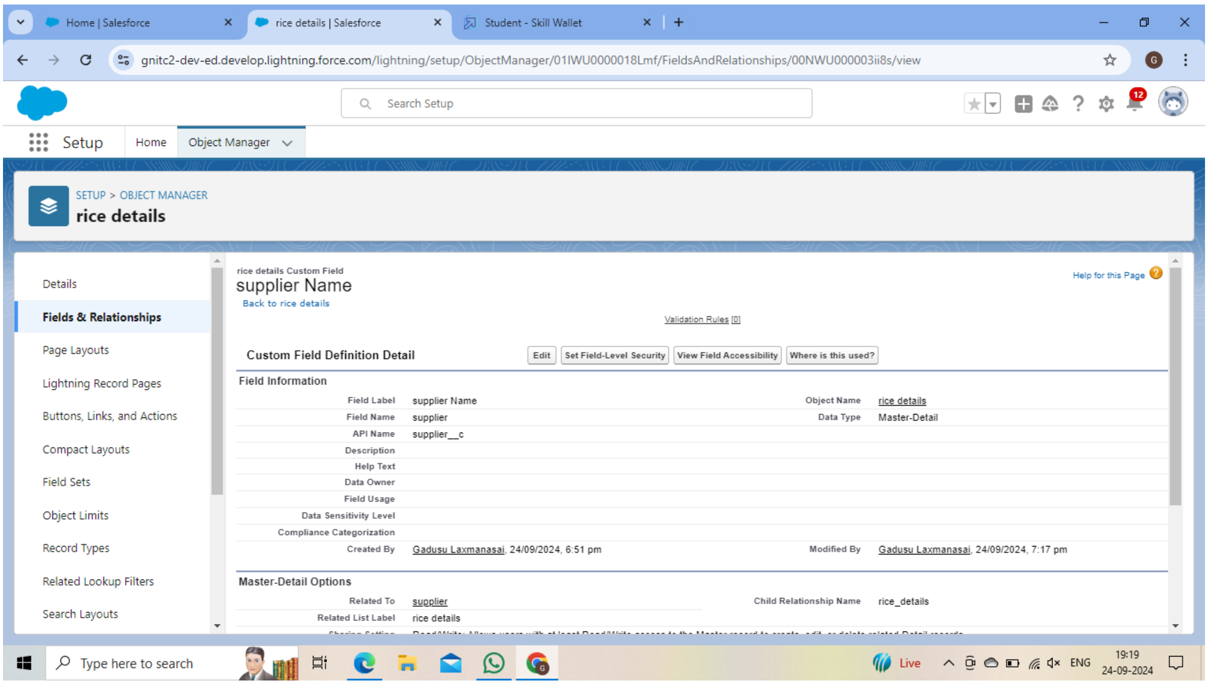
1. Go to the setup page >> click on object manager >> From drop down click edit for rice details object.
2. Click on fields & relationship >> click on New.



3. Select Data type as "master detail" and click Next.
4. Given the Field Label as " supplier name " and length as " 5



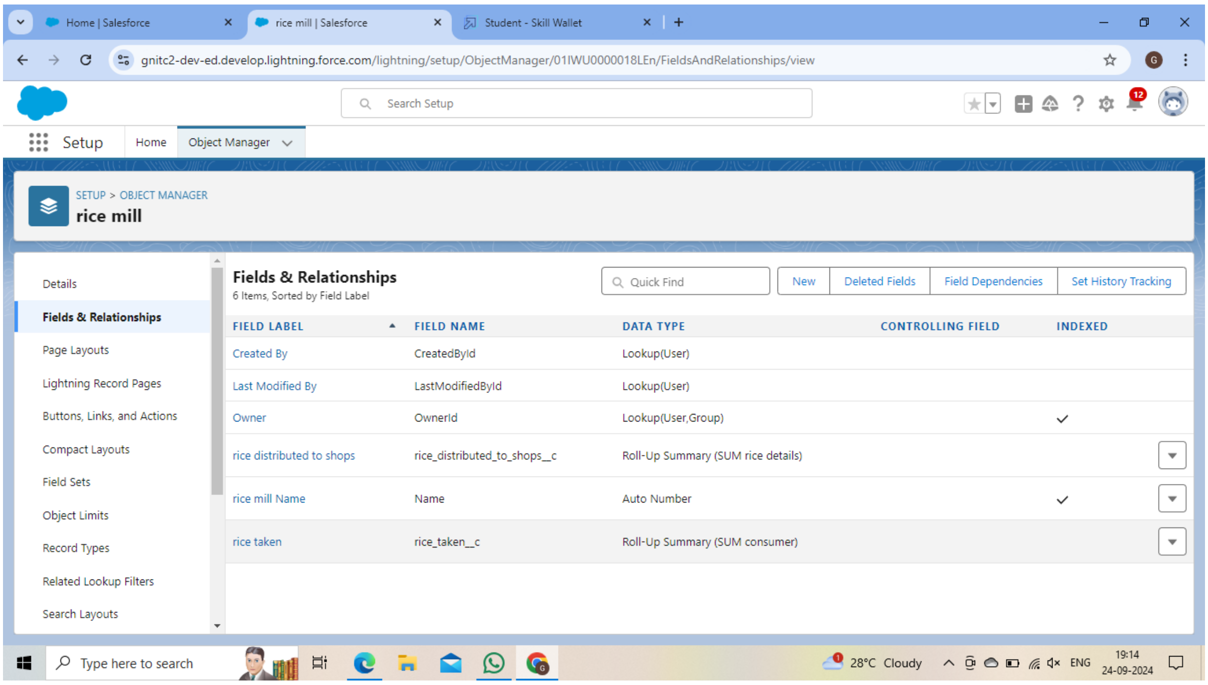
5. Field Name will be auto populated, and click on Next>> Next >>Save.


Home | Salesforce
rice details | Salesforce
Student - Skill Wallet
gnitc2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IWU0000018Lmf/FieldsAndRelationships/00NWU000003ii8s/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
rice details
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
rice details Custom Field
supplier Name
Back to rice details
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label supplier Name
Object Name rice details
Field Name supplier
Data Type Master-Detail
API Name supplier__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By Gadusu Laxmanasai, 24/09/2024, 6:51 pm
Modified By Gadusu Laxmanasai, 24/09/2024, 7:17 pm
Master-Detail Options
Related To supplier
Child Relationship Name rice_details
Related List Label rice details
Type here to search
Live
ENG
19:19
24-09-2024

Task 15:

Creating Fields in rice mill Objects

1. Go to the setup page >> click on object manager >> From drop down click edit for rice mill 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 price/kg” length as “ 5
5. Field Name will be auto populated, and click on Next>> N



Task 16:

Creating Fields in consumer Objects

<table>
<tr><td>S.no</td><td>Object name</td><td>Fields data type</td></tr>
<tr><td>1.</td><td>consumer</td><td>
<table>
<tr><td>First name</td><td>Text</td></tr>
<tr><td>Last name</td><td>Text</td></tr>
<tr><td>Phone number</td><td>phone</td></tr>
</table>
</td></tr>
<tr><td></td><td></td><td>
<table>
<tr><td>email</td><td>email</td></tr>
<tr><td>Rice taken by shops</td><td>Number (length=5)</td></tr>
</table>
<table>
<tr><td>Rice type</td><td>(Picklist values)
1.basmati
2.normal rice</td></tr>
<tr><td>Mode of payment</td><td>Picklist values
Credit card
Debit card
Net banking
UPI
Cash</td></tr>
</table>
</td></tr>
<tr><td></td><td></td><td></td></tr>
</table>

Task-17:

Creating Cross Object Formula Field in consumer Object

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

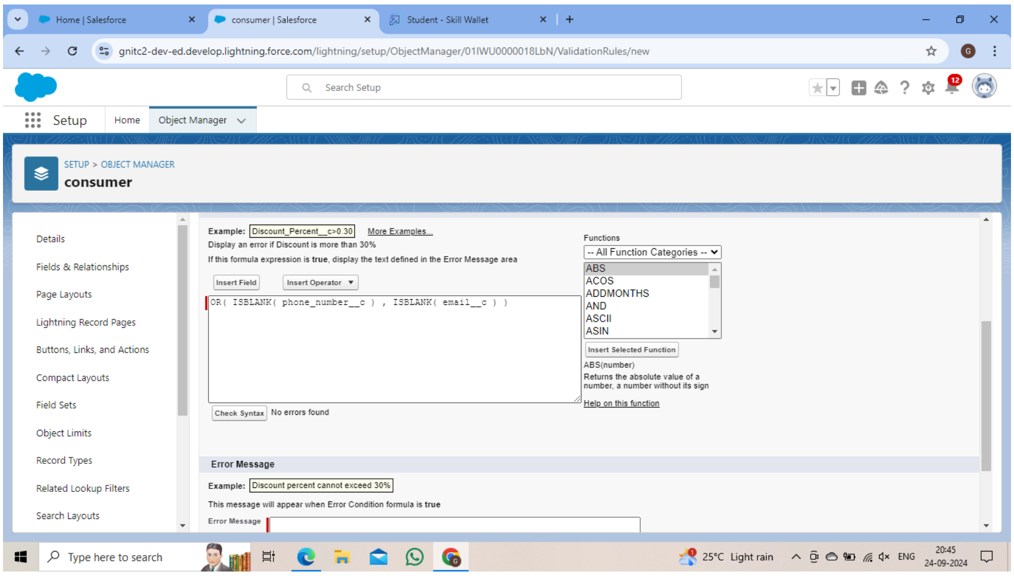
Note : check whether the fields mentioned in the formula field are created or not , if not go to activity 9 and create those fields mentioned in consumer object.

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

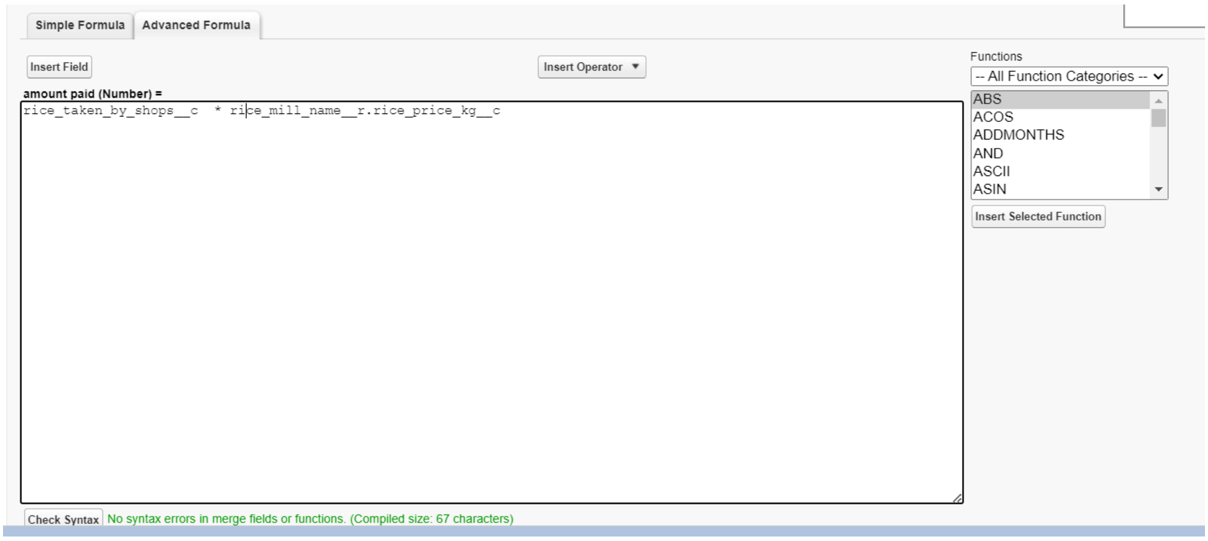
6. Under Advanced Formula write down the formula and click "Check Syntax" and Save.



1. Creating the Formula field in consumer Object

Note : check whether that the fields that mentioned in the formula field are created are not , if not go to activity 9 and create that fields mentioned in consumer object

2. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
3. Click on fields & relationship >> click on New.
4. Select Data type as "Formula" and click Next.
5. Give Field Label and Field Name as "Consumer Name" and select formula return type as "TEXT" and click next.
6. Insert field formula should be : First_Name__c + ' ' + Last_Name__c
7. click "Check Syntax" and Save.

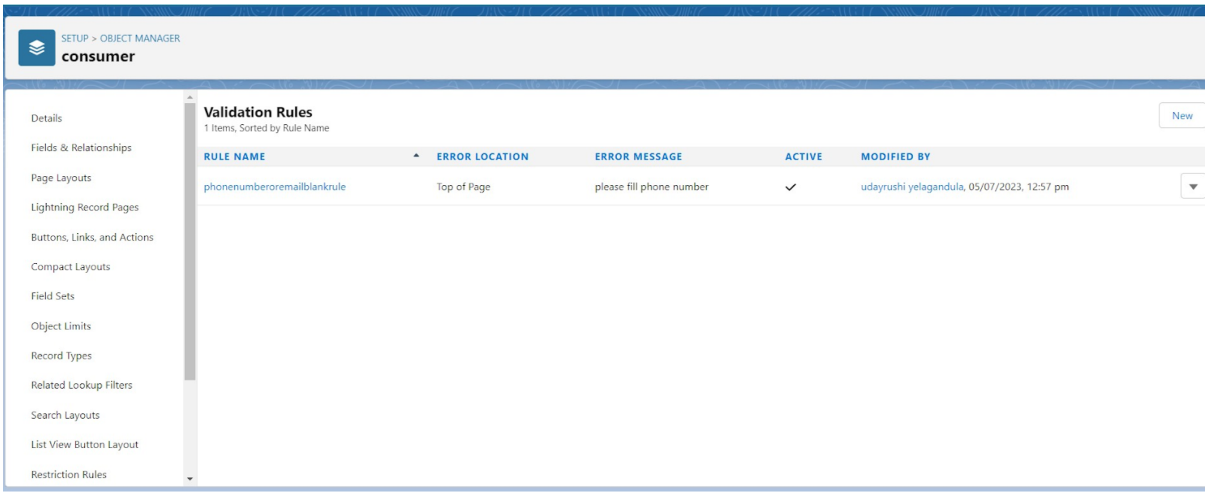


Task-18:

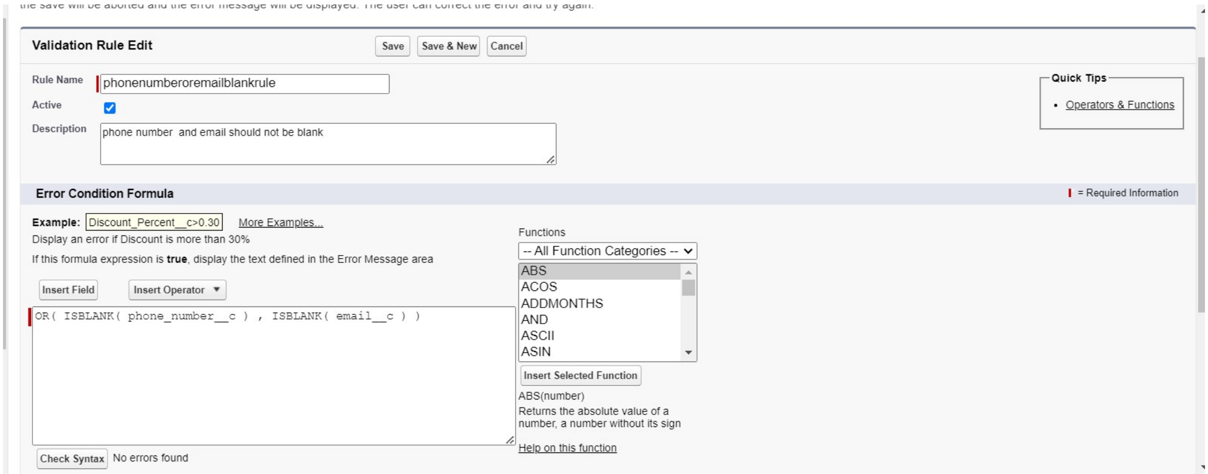
Creating the validation rule

Creating the validation rule for phone number field in consumer object

1. Go to the setup page >>click on object manager >> From drop down click edit for consumer object.
2. Click on the validation rule >> click New.

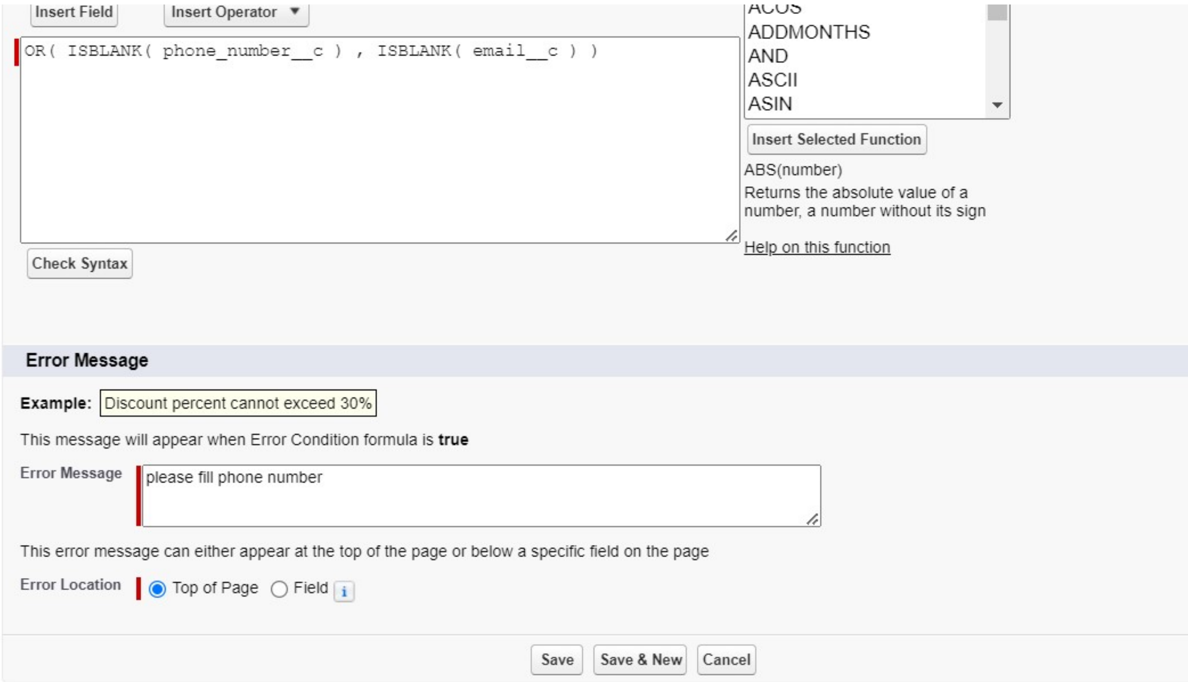


3. Enter the Rule name as “Phonenumberoremailblankrule ”.
4. Enter the description as “phone number and email number should not be blank”.
5. Enter the formula as “OR(ISBLANK(phone_number__c) , ISBLANK(email__c))” and check the syntax.



6.Under the error message write as”please fill in your phone number.”

7.Select error location “top of page”.



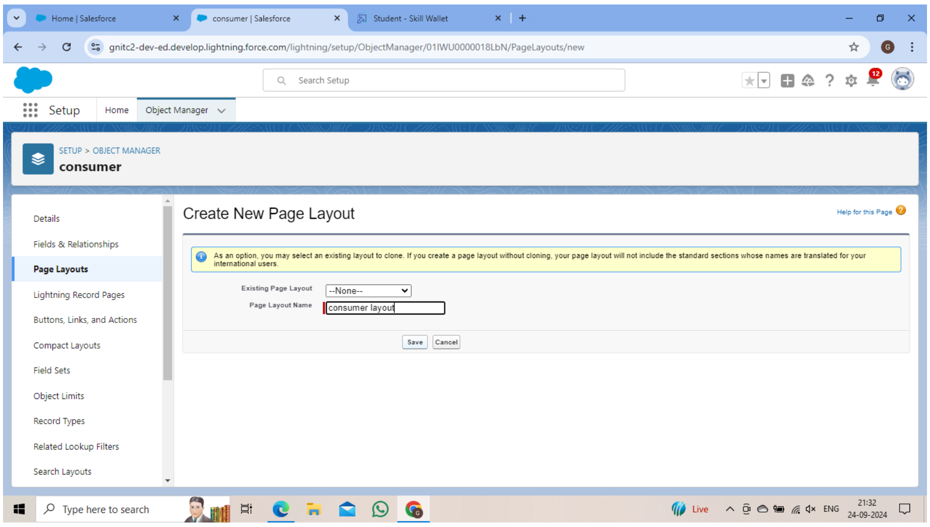
8.Save the validation rule.

Task-19:

creating the page layout

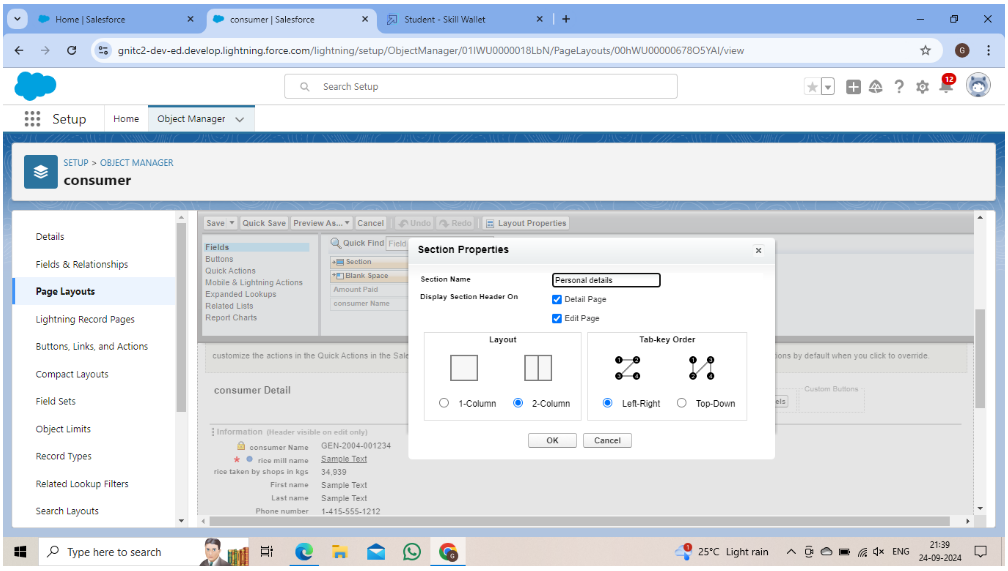
To Create a Page layout:

1. Go to Setup >> Click on Object Manager >>Search for the object (consumer) >> From drop down select the object and click on it.
2. Click on Page layout >> Click on New.



3. Select the existing page layout, and give the page layout name as "consumer layout", and click save.

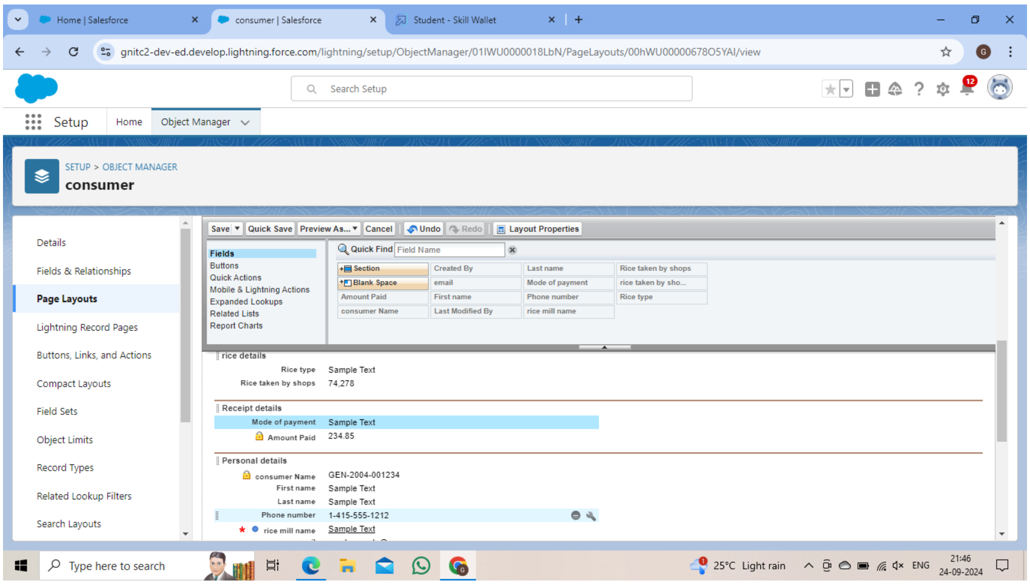
4. Drag and drop the section field to consumer details and create the section.
5. Enter the section name as "Personal details", - click Ok.



7. Now drag the fields to this section that mentioned , they are

- First name , last name , consumer name , phone number, email, rice mill name.

8. Follow the same process for another two sections as shown above , they are
9. One section is “ rice details ” , drag the fields that are
- Rice taken by shop, rice type.
10. Another section is “Receipt details ”, and drag the fields that are
- Mode of payment , Amount paid.
11. Then , Click save.

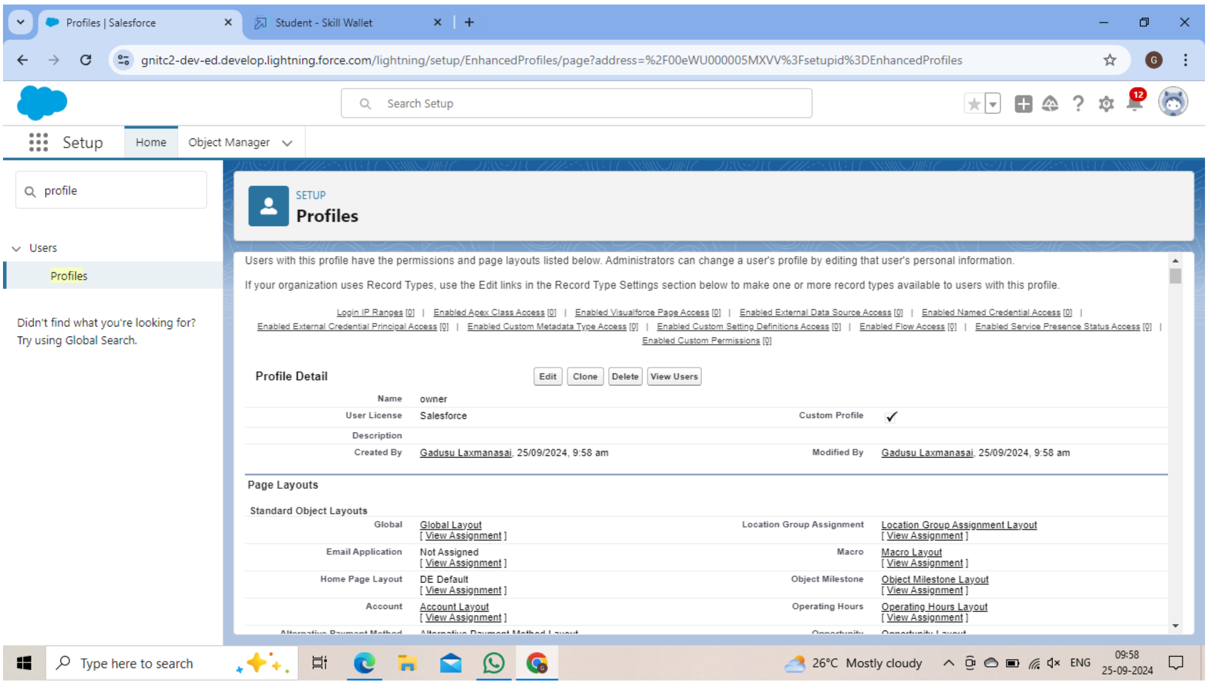


Task-20:

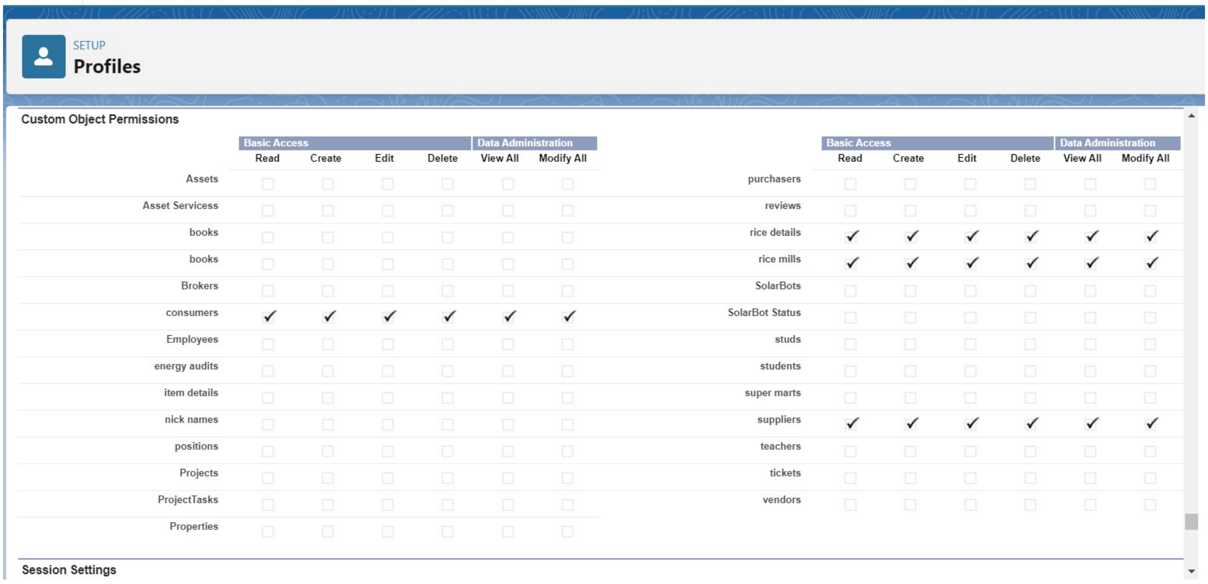
owner Profile

To create a new profile:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >>enter profile name (owner) >> Save.



2. Scroll down to Custom Object Permissions and Give access permissions for consumers, rice details , rice mill and suppliers objects as mentioned in the below diagram.

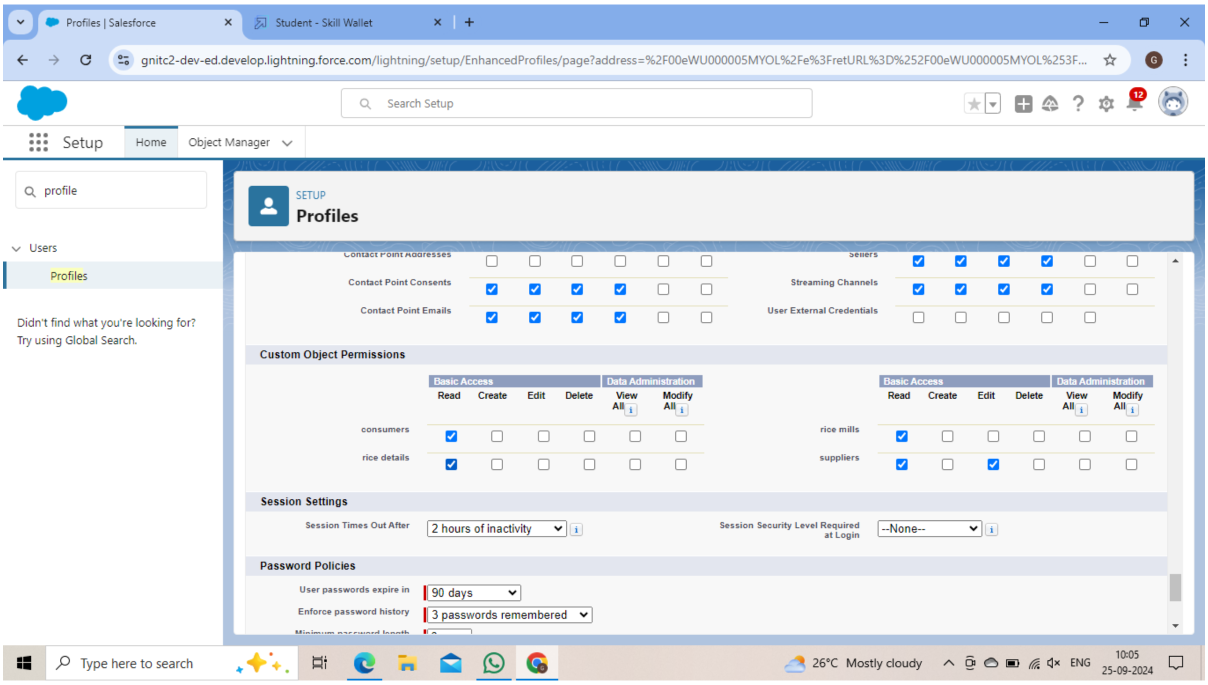


3.Give access and save it.

Task-21:

employer Profile

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

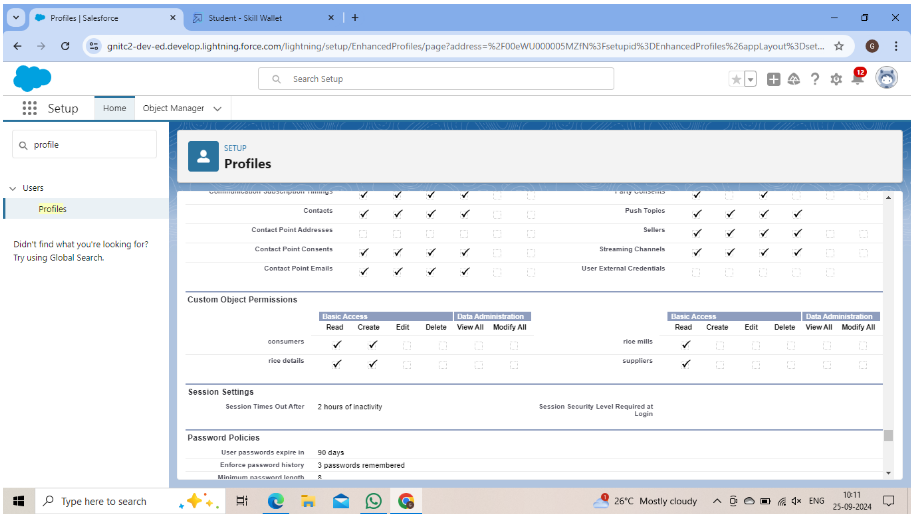


5. And click save.

Task-22:

worker Profile

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



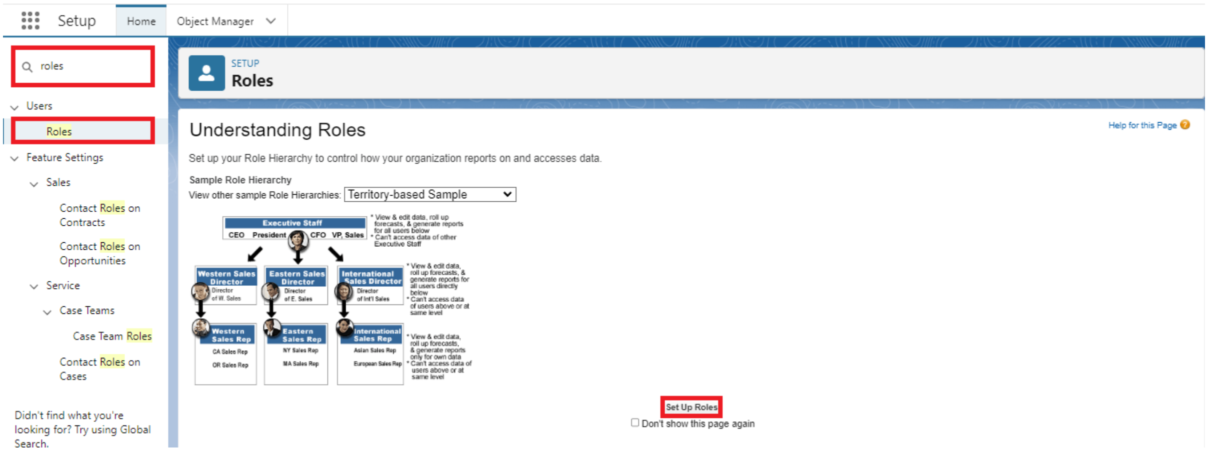
5. And click save.

Task-23:

Creating owner Role

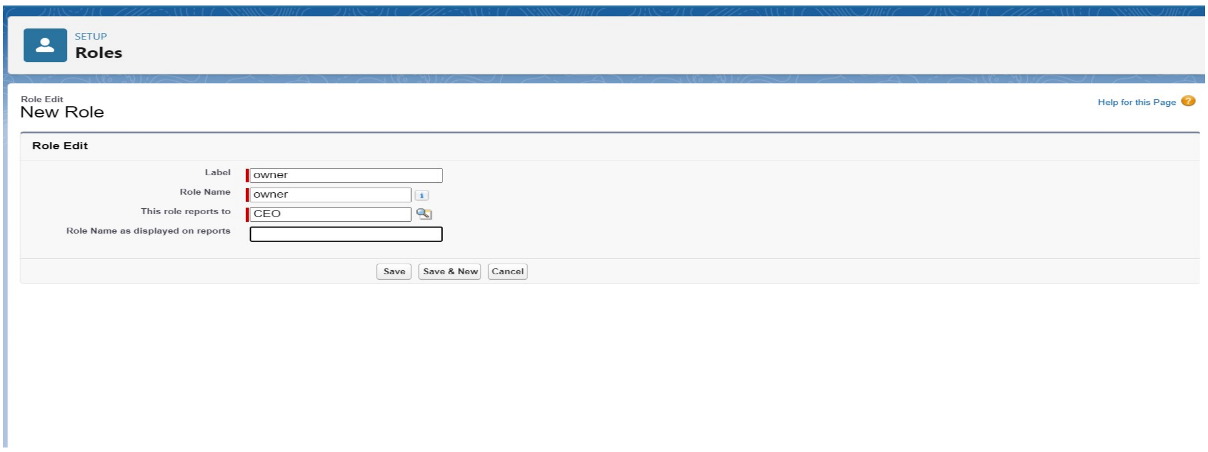
Creating owner Role:

1. Go to quick find >> Search for Roles >> click on set up roles.
2. Go to quick find >> Search for Roles >> click on set up roles.

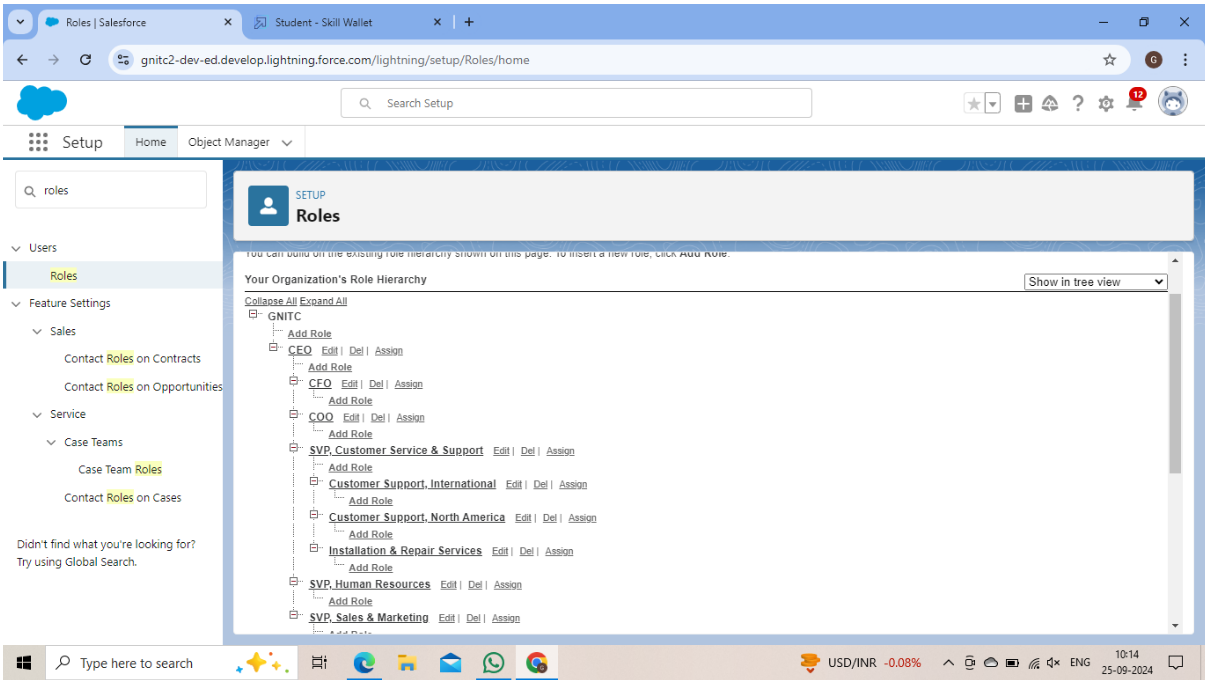


3.Click on Expand All and click on add role under whom this role works.

4.Give Label as “owner” and Role name gets auto populated. Then click on Save.



5.Click and save it.

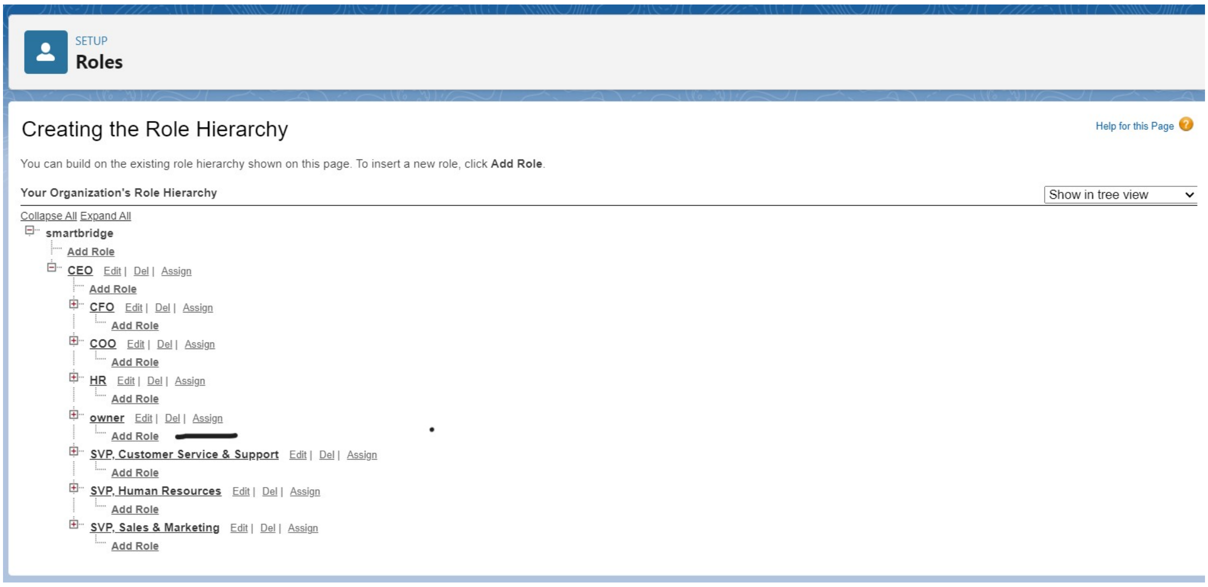

Roles | Salesforce
Student - Skill Wallet
gnitc2-dev-ed.develop.lightning.force.com/lightning/setup/Roles/home
Search Setup
Setup
Home
Object Manager
roles
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for?
Try using Global Search.
SETUP
Roles
Your Organization's Role Hierarchy
Show in tree view
Collapse All Expand All
GNITC
Add Role
CEO Edit | Del | Assign
Add Role
CFO Edit | Del | Assign
Add Role
COO Edit | Del | Assign
Add Role
SVP, Customer Service & Support Edit | Del | Assign
Add Role
Customer Support, International Edit | Del | Assign
Add Role
Customer Support, North America Edit | Del | Assign
Add Role
Installation & Repair Services Edit | Del | Assign
Add Role
SVP, Human Resources Edit | Del | Assign
Add Role
SVP, Sales & Marketing Edit | Del | Assign
Type here to search
USD/INR -0.08%
ENG
10:14
25-09-2024

Task-24:

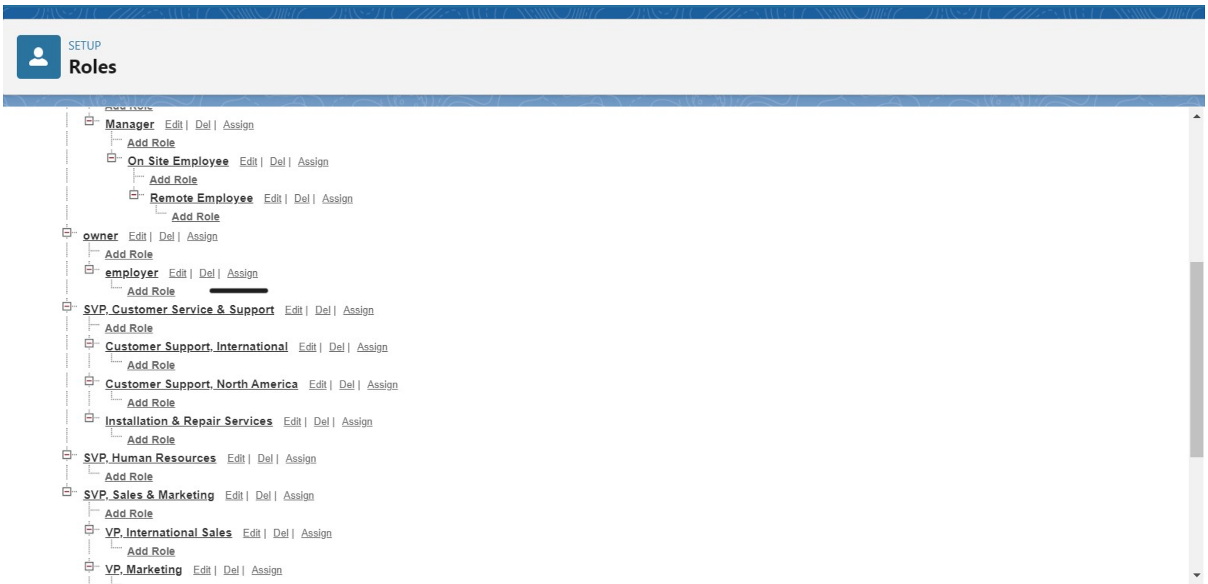
Creating employer roles

Creating another two roles under manager

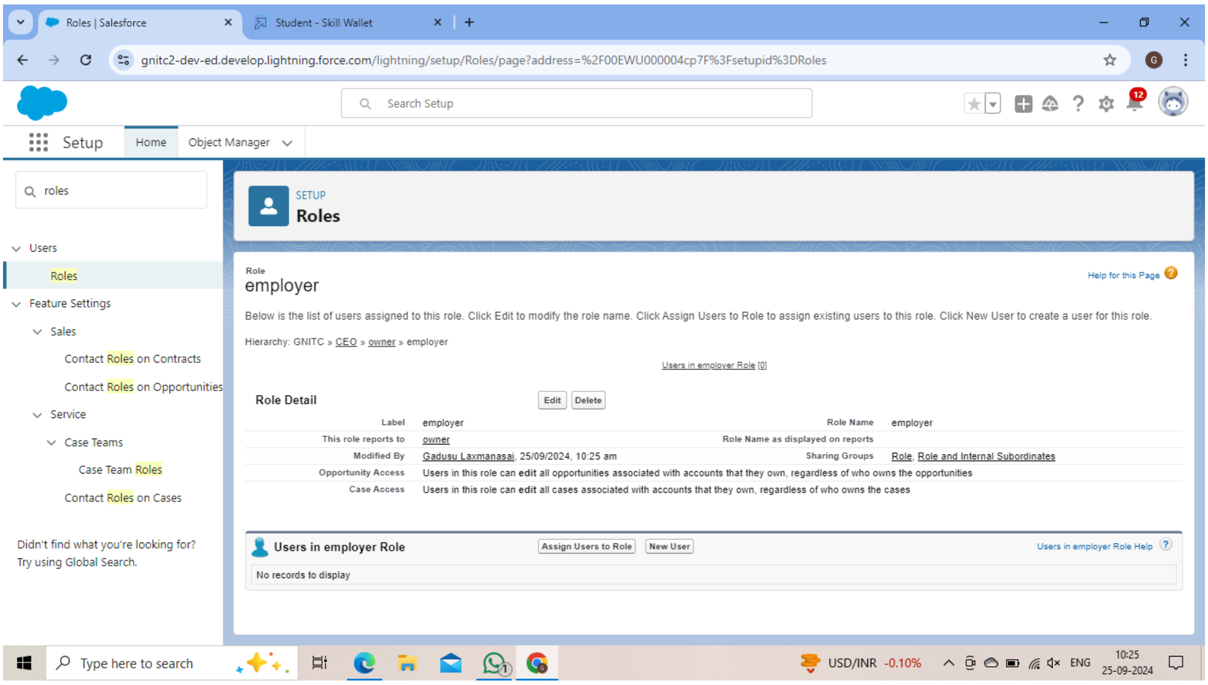
1. Go to quick find >>Search for Roles >>click on set up roles.
2. Click plus on CEO role, and click add role under owner.



4. Give Label as “employer” and Role name gets auto populated. Then click on Save.
5. Repeat the same steps, for another role.
6. Click plus on CEO role, and click plus on owner, and click add role under employer.



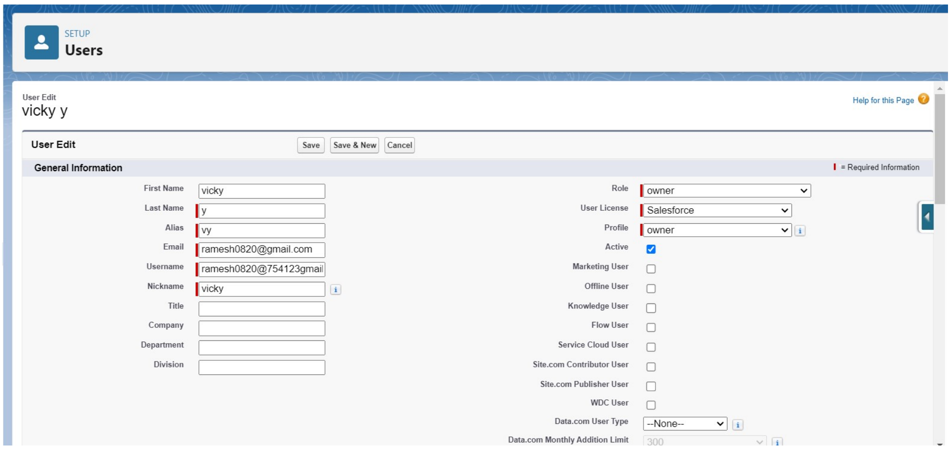
7..give Label as “worker” and Role name gets auto populated. Then click on Save.

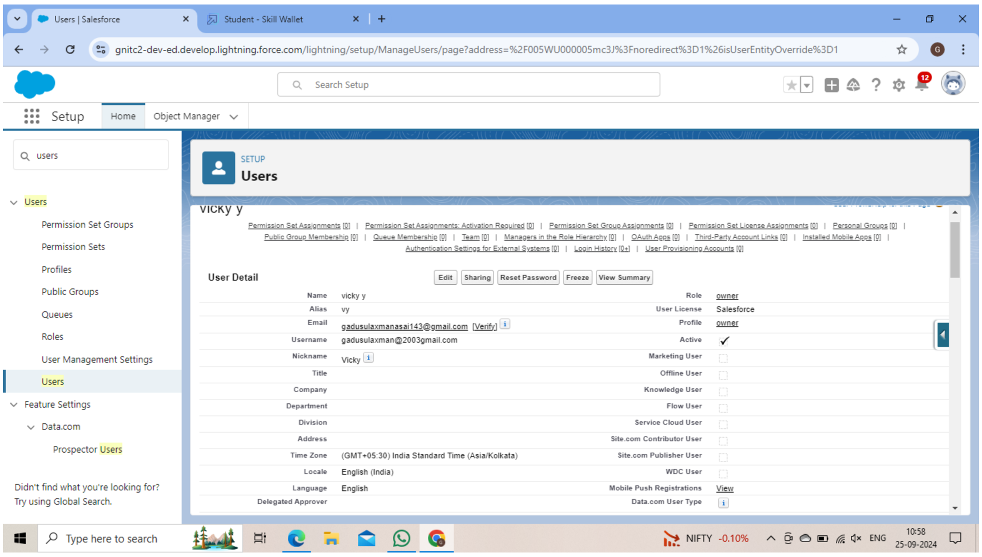


Task-25:

Create User

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



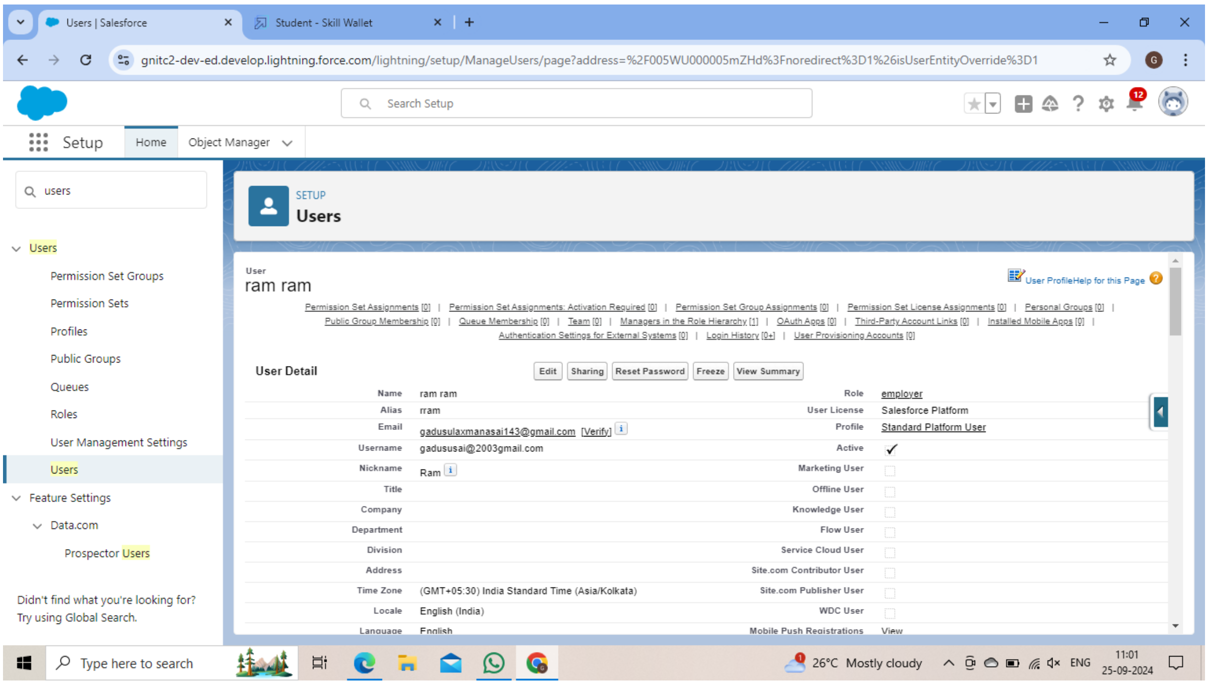


12.Save it.

Task-26:

creating another users

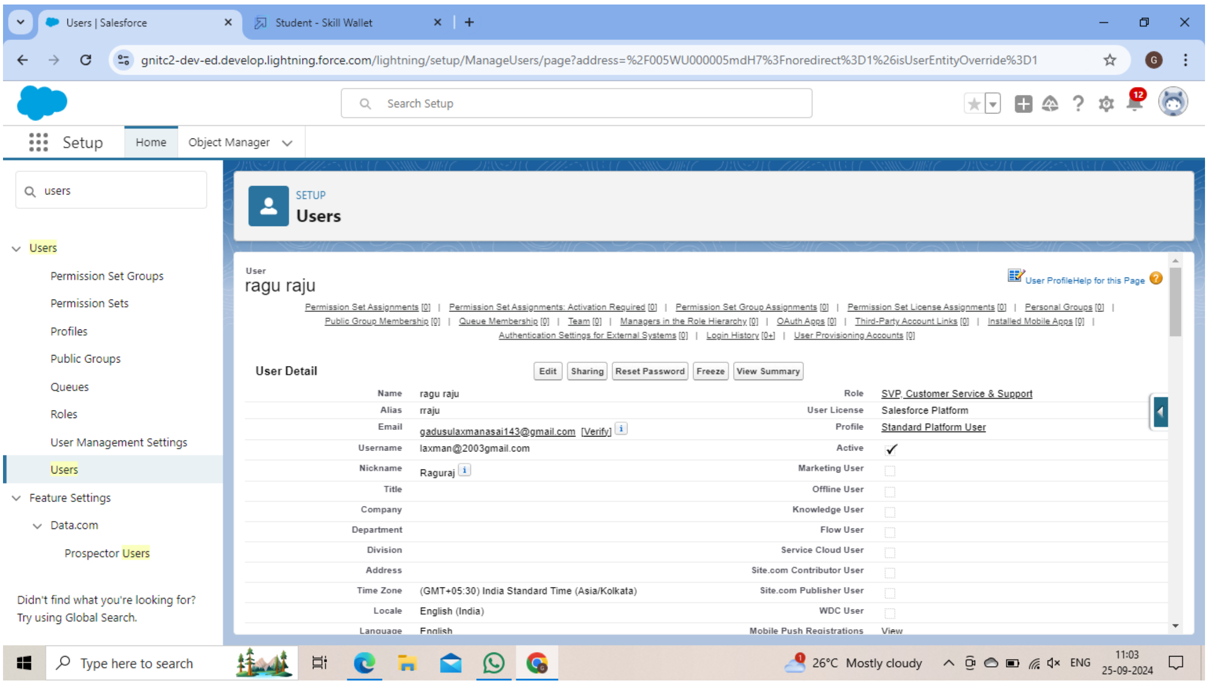
1. Go to setup ? type users in quick find box ? select users ? click New user.
2. Fill in the fields
3. First Name : ram
4. Last Name : ram
5. Alias : Give a Alias Name
6. Email id : Give your Personal Email id
7. Username : Username should be in this form: text@text.text
8. Nick Name : Give a Nickname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



Task-27:

Create Another User

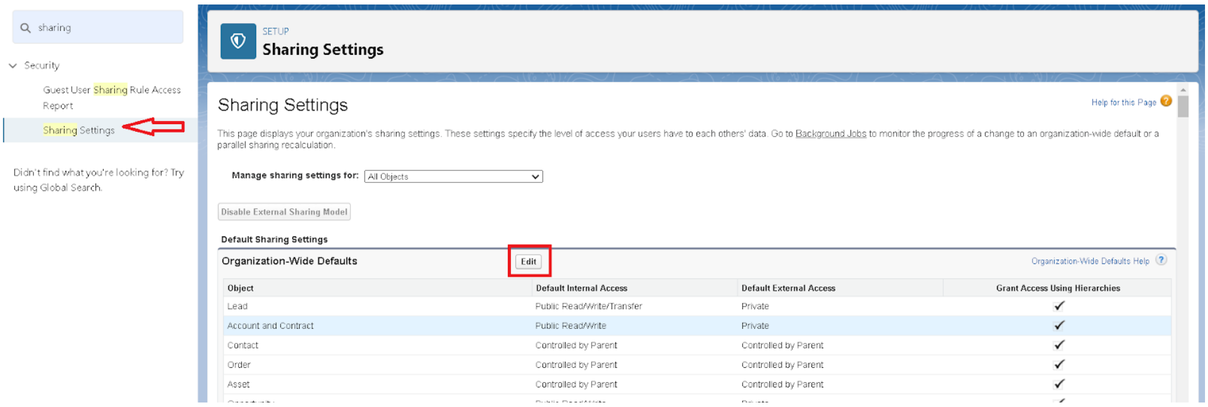
1. Go to setup ? type users in quick find box ? select users ? click New user.
2. Fill in the fields
3. First Name : ragu
4. Last Name : raj
5. Alias : Give a Alias Name
6. Email id : Give your Personal Email id
7. Username : Username should be in this form: text@text.text
8. Nick Name : Give a Nickname
9. Role : worker
10. User license : Salesforce platform
11. Profiles: standard platform user.

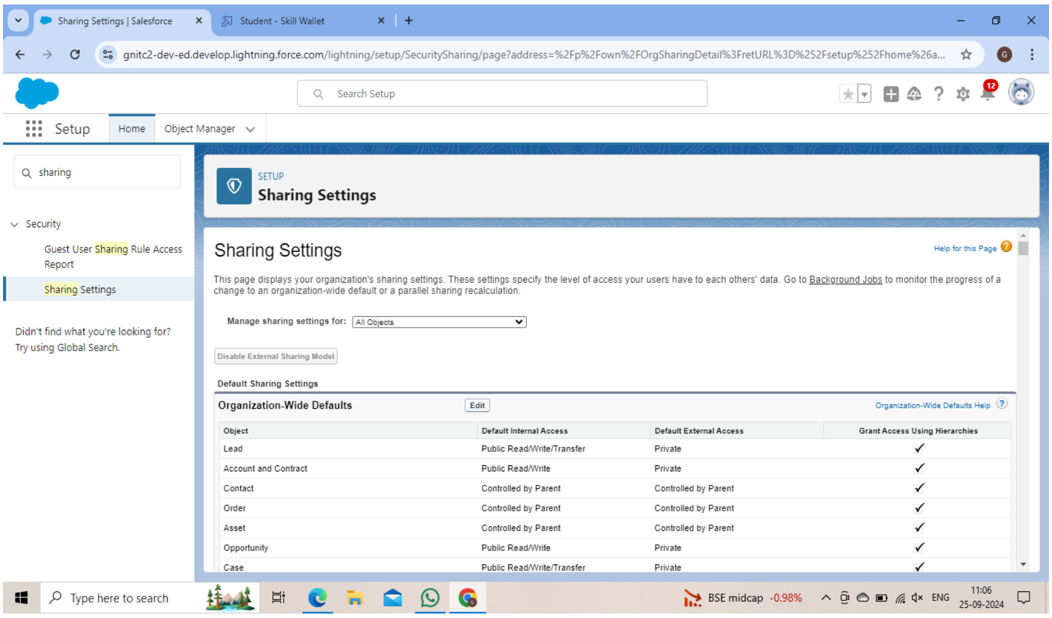


Task-28:

Creating OWD setting.

1. Go to setup >> type “sharing settings ” in quick search >> Click edit.





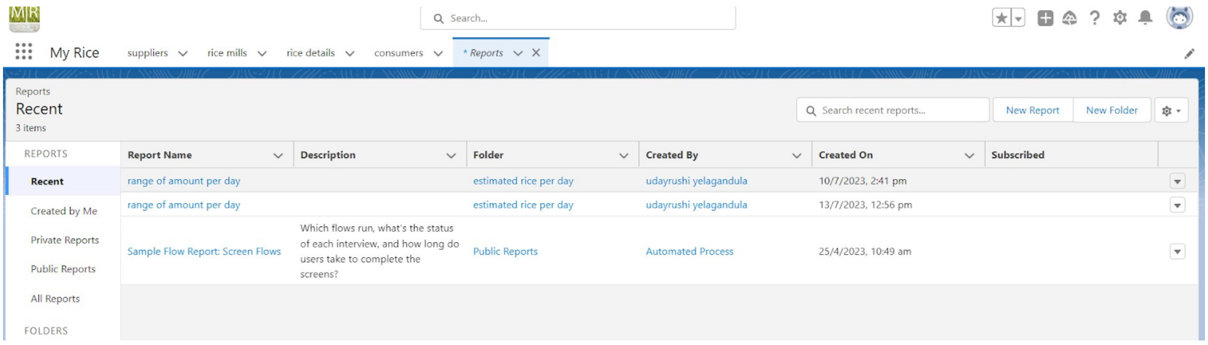
2. Scroll down, change the default internal access to “ public read-only” for rice mill and supplier object.
3. Click save.
4. Extra information, By these every profile has their own access, according to their profile.
5. But in our case we created roles and given the roles in such a way that the owner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

Task-29:

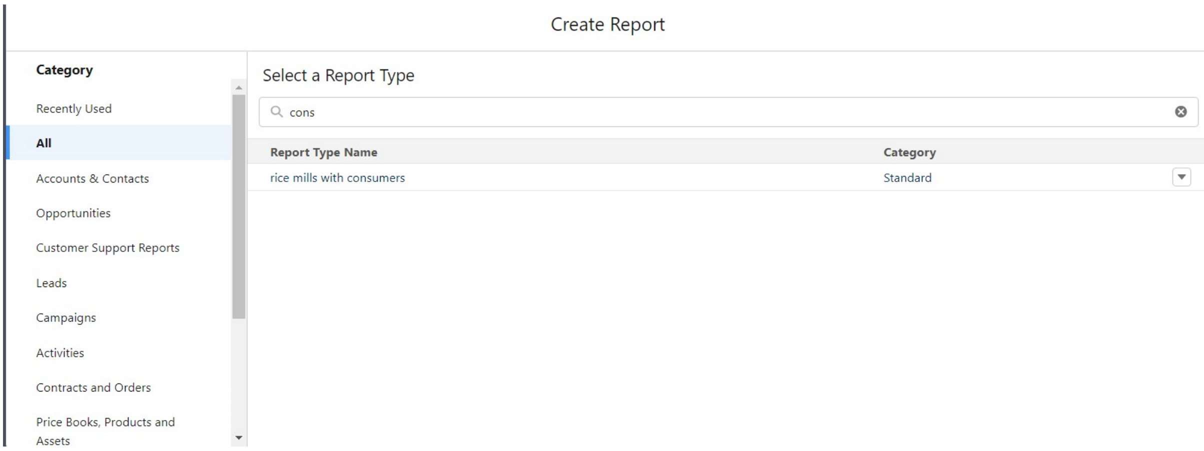
Create Report

Note : Before creating a report, create the latest “10” records in consumer objects. Try to fill every field in each record for better experience.

1. Go to the app >>click on the reports tab
2. Click New Report.



3. select for report type, search for “rice mill with consumers” click on it. And click on start report.



1. Their outline pane is opened already, select the fields that are mentioned below in the column section.

   1.consumer name

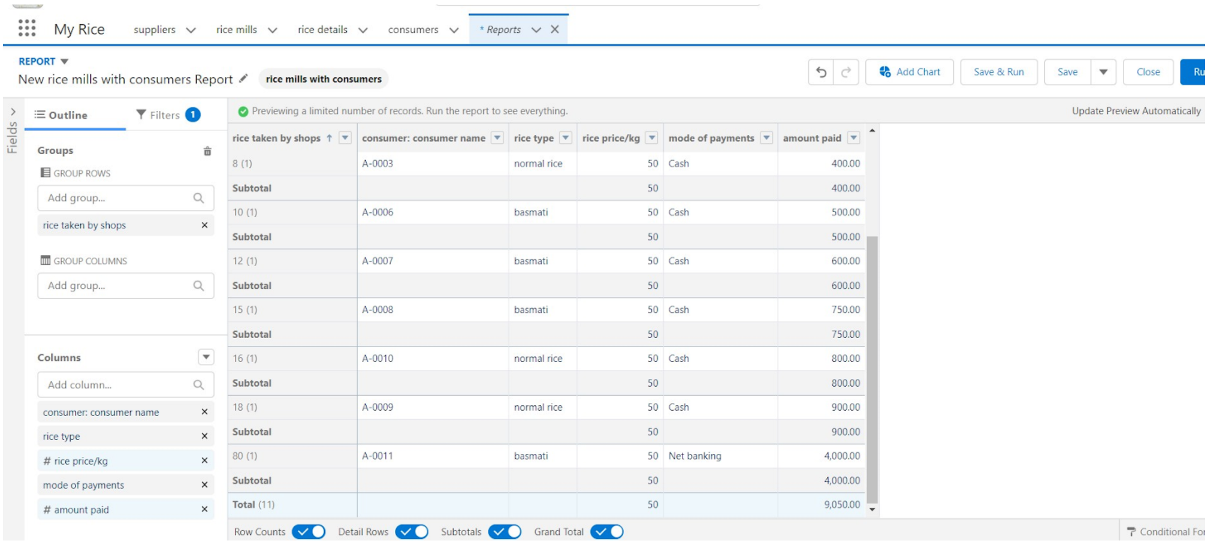
   2.rice type

   3.rice price/kg

   4.mode of payments

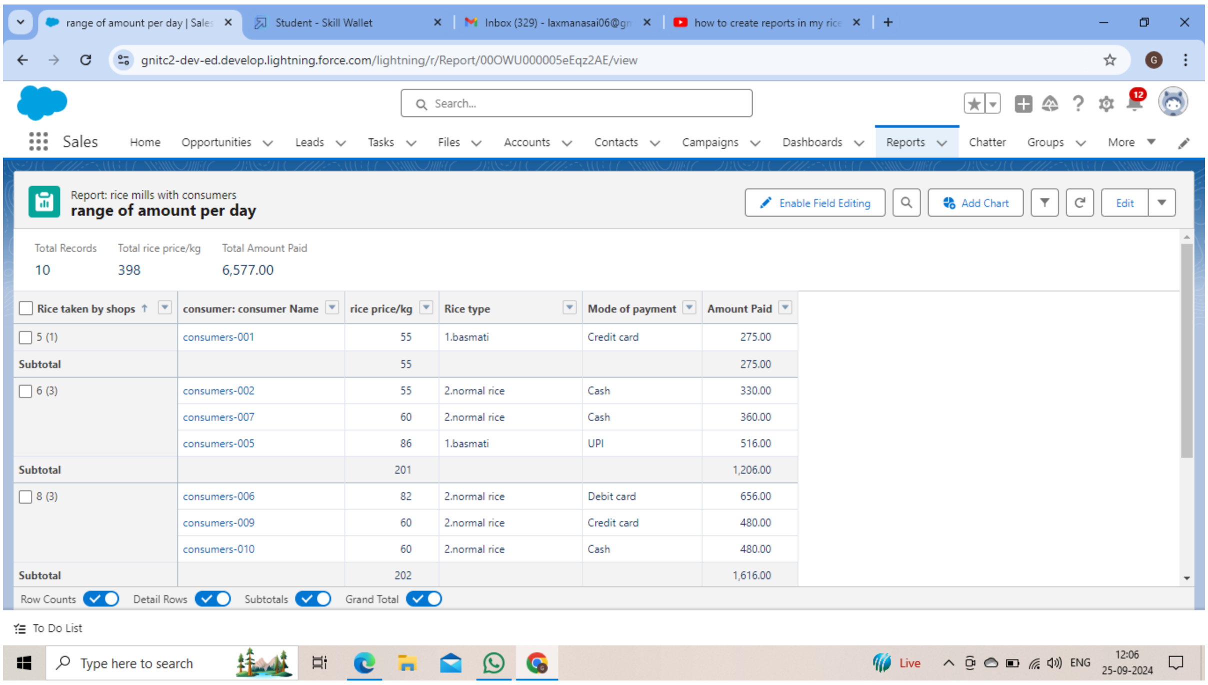
5.amount paid

2. Remove the unnecessary fields.
3. Select the fields that are mentioned below in the GROUP ROWS section.
    1. Rice taken by shops



rice taken by shops	consumer: consumer name	rice type	rice price/kg	mode of payments	amount paid
8 (1)	A-0003	normal rice	50	Cash	400.00
Subtotal			50		400.00
10 (1)	A-0006	basmati	50	Cash	500.00
Subtotal			50		500.00
12 (1)	A-0007	basmati	50	Cash	600.00
Subtotal			50		600.00
15 (1)	A-0008	basmati	50	Cash	750.00
Subtotal			50		750.00
16 (1)	A-0010	normal rice	50	Cash	800.00
Subtotal			50		800.00
18 (1)	A-0009	normal rice	50	Cash	900.00
Subtotal			50		900.00
80 (1)	A-0011	basmati	50	Net banking	4,000.00
Subtotal			50		4,000.00
Total (11)			50		9,050.00

Click save and run and save the report as “range of amount per day”.and save it.

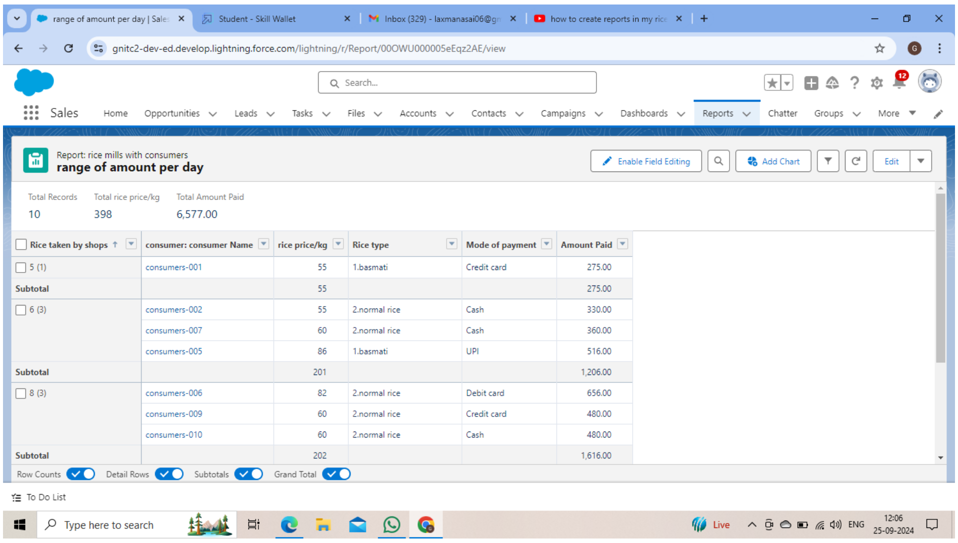


Rice taken by shops	consumer: consumer Name	rice price/kg	Rice type	Mode of payment	Amount Paid
5 (1)	consumers-001	55	1.basmati	Credit card	275.00
Subtotal		55			275.00
6 (3)	consumers-002	55	2.normal rice	Cash	330.00
	consumers-007	60	2.normal rice	Cash	360.00
	consumers-005	86	1.basmati	UPI	516.00
Subtotal		201			1,206.00
8 (3)	consumers-006	82	2.normal rice	Debit card	656.00
	consumers-009	60	2.normal rice	Credit card	480.00
	consumers-010	60	2.normal rice	Cash	480.00
Subtotal		202			1,616.00

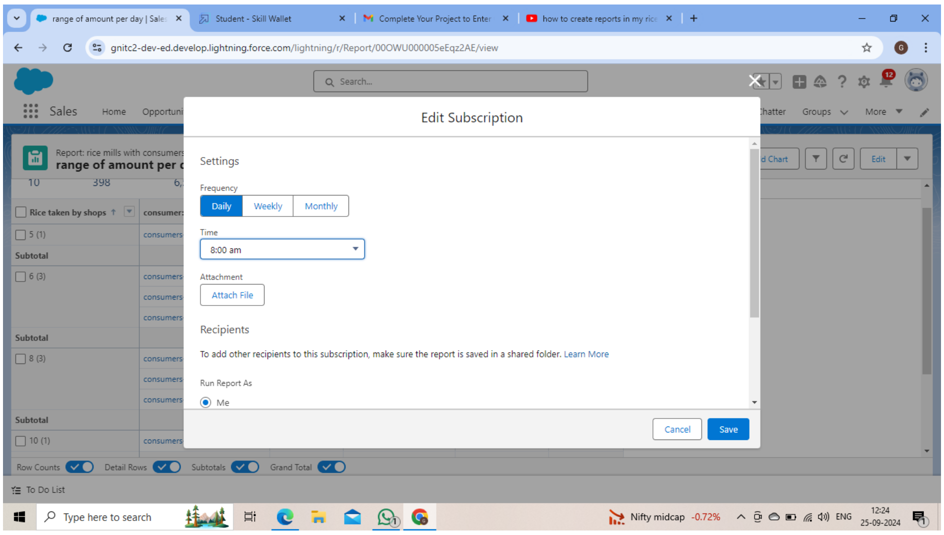
Task-30

Sharing report to owner

1. Click edit drop down and select subscribe option



2.Follow as per below image.



3.After selecting the run report as a "another person" select your personal account or whom you want to send that mail to.

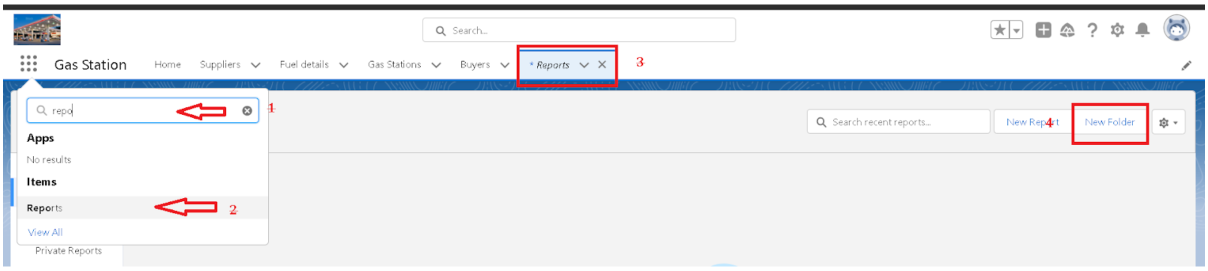
1. Click save.

NOTE: The owner gets daily email notification of that rice mill report.so that he can see all data remotely.

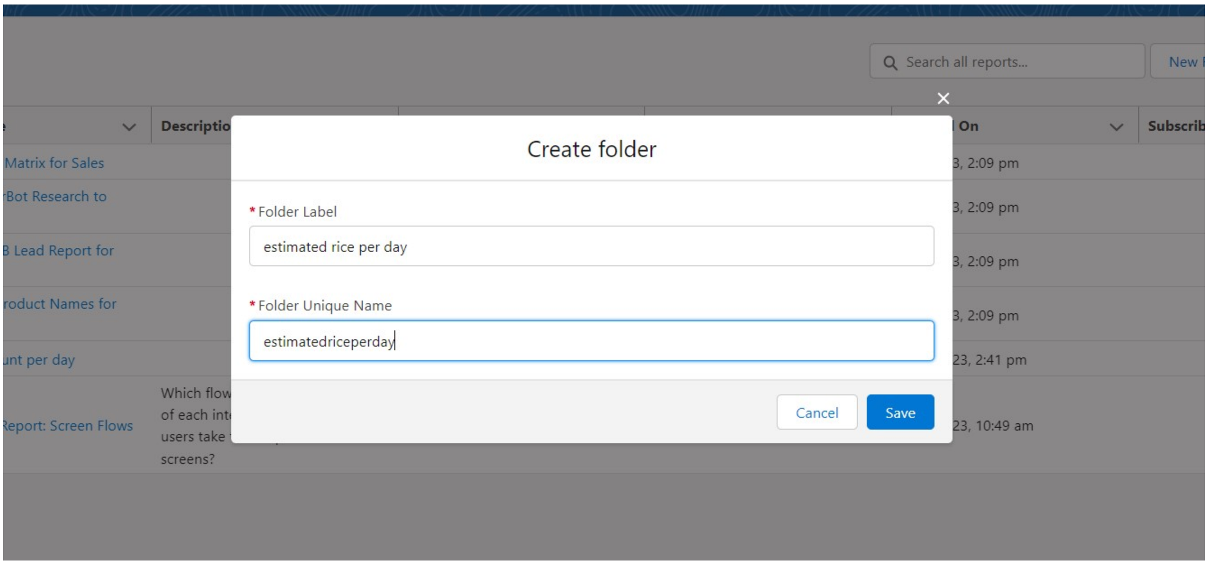
Task-31:

create a report folder

1. Click on the app launcher and search for reports.
2. Double click on the report, " reports tab" will be auto populated in the navigation bar.
3. Click on the report tab, click on the new folder.



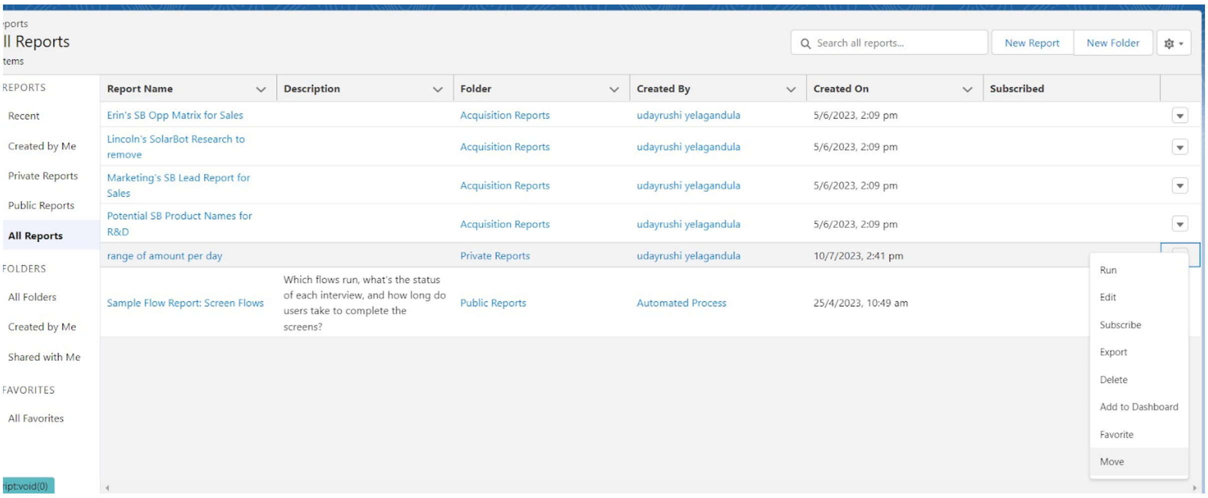
4. Give the Folder label as "estimated rice per day ", Folder unique name will be auto populated.
5. Click save.



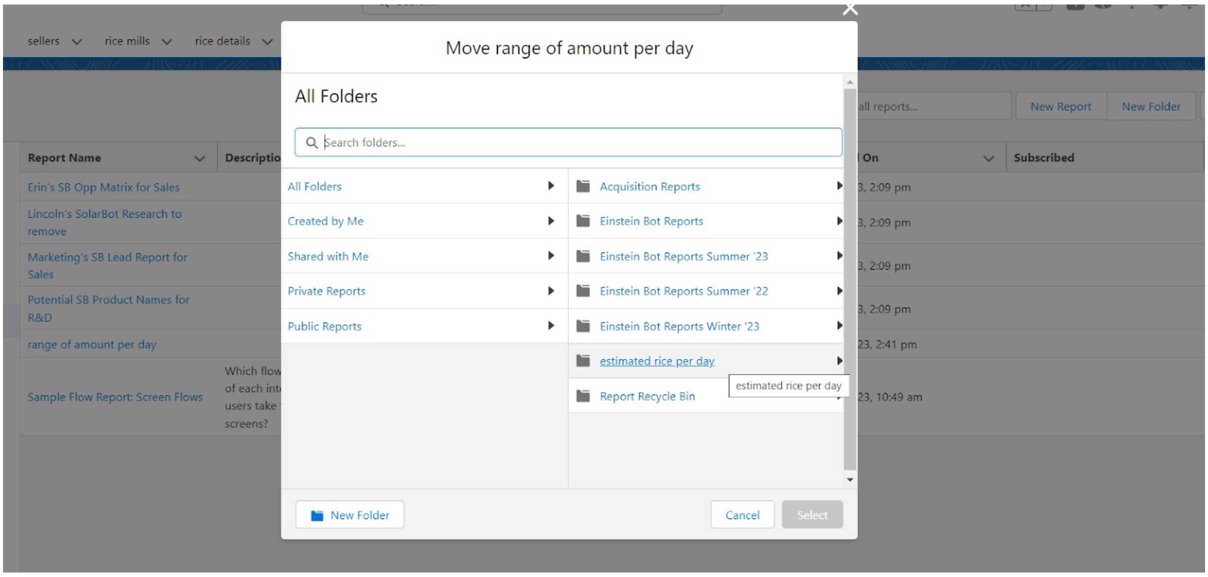
1.navigate to app launcher and click reports on that.

2.click all reports.

3. Select the range of amount per day drop down in that click move.



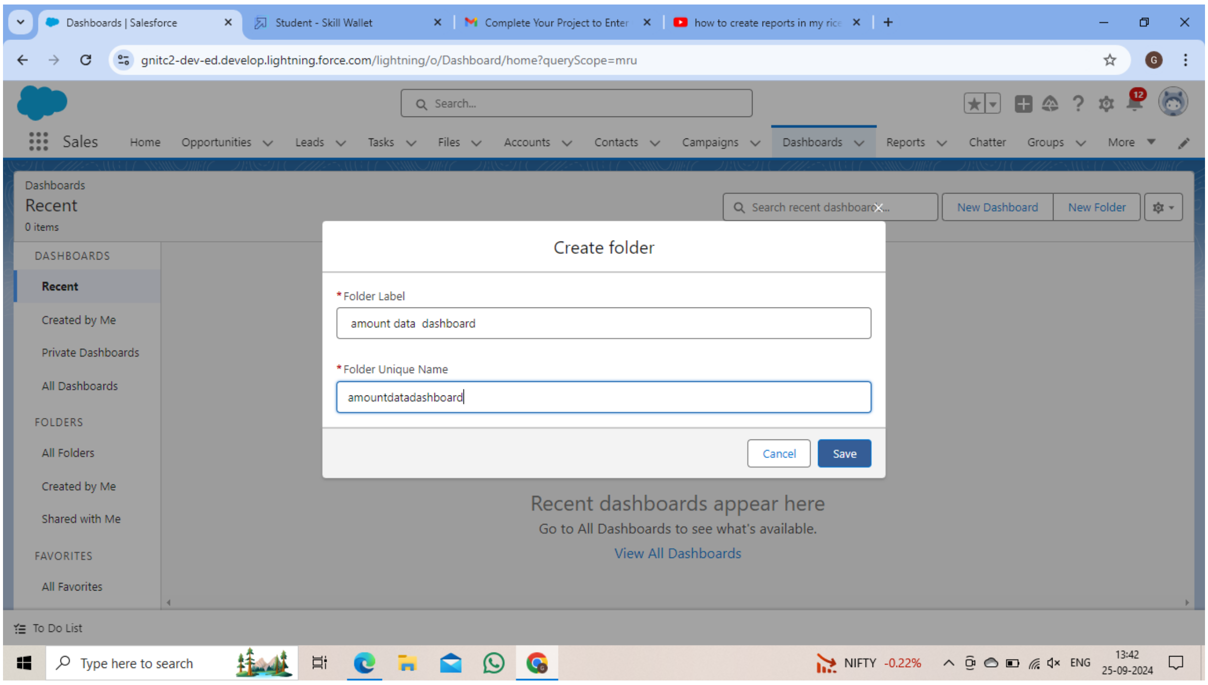
4. Select estimated rice per day folder and select folder.



Task-32:

Create Dashboard Folder

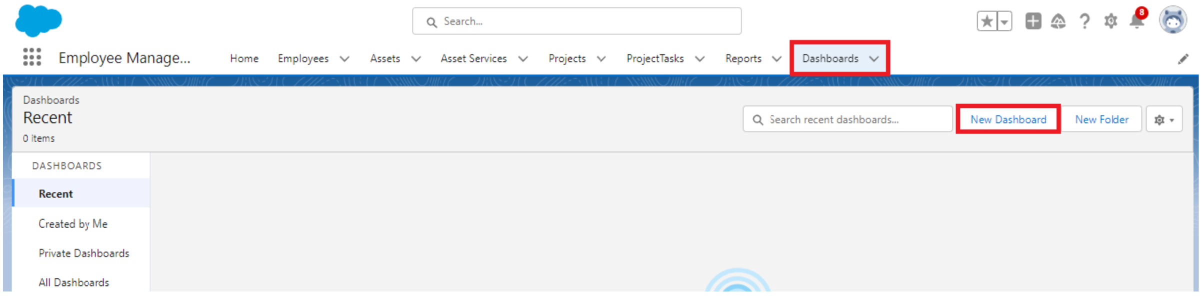
1. Click on the app launcher and search for the dashboard.
2. Click on the dashboard tab.
3. Click the new folder, give the folder label as “ amount data dashboard”.
4. Folder unique names will be auto populated.
5. Click save.



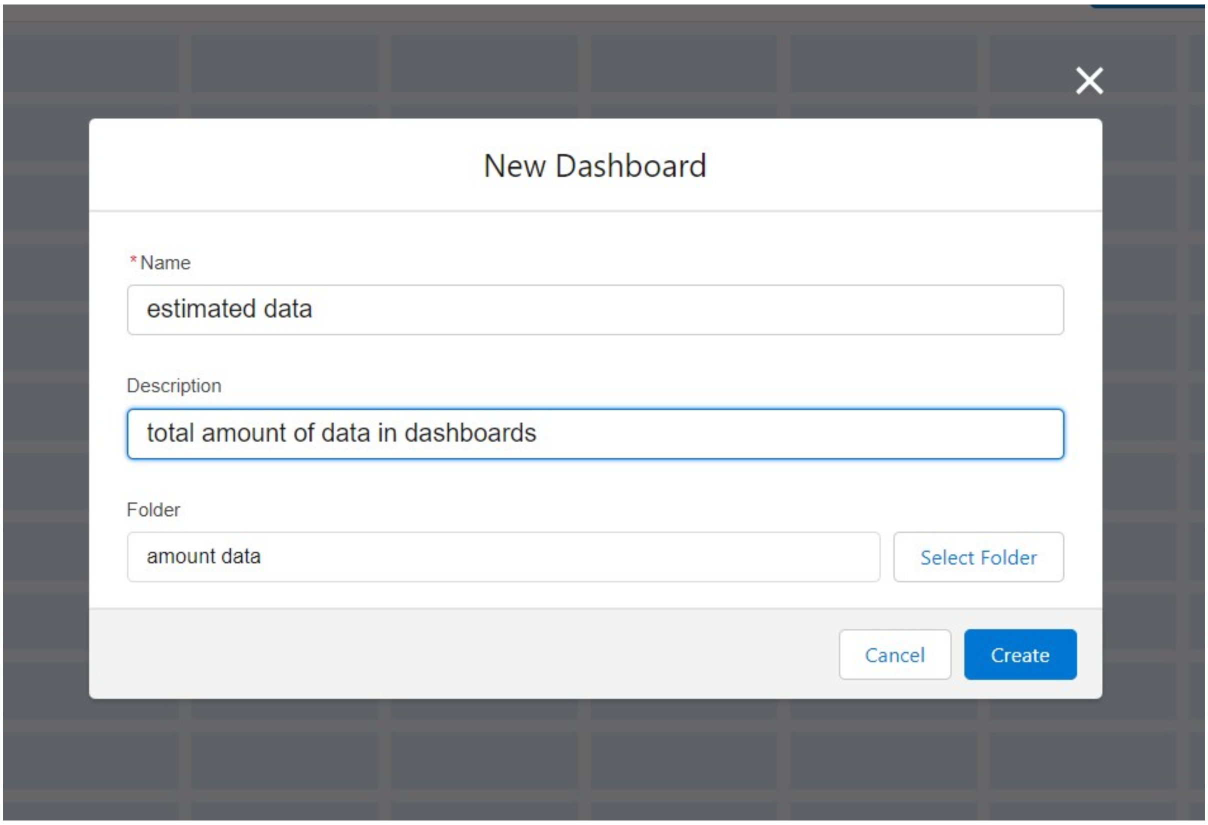
Task-33:

Create Dashboard

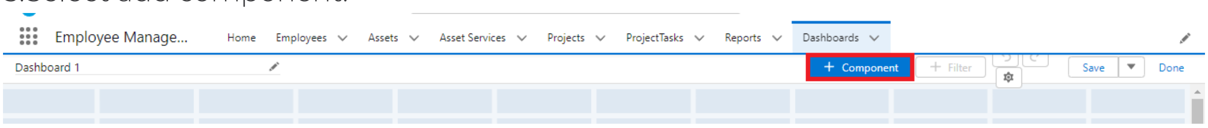
1. Go to the app >> click on the Dashboards tabs.



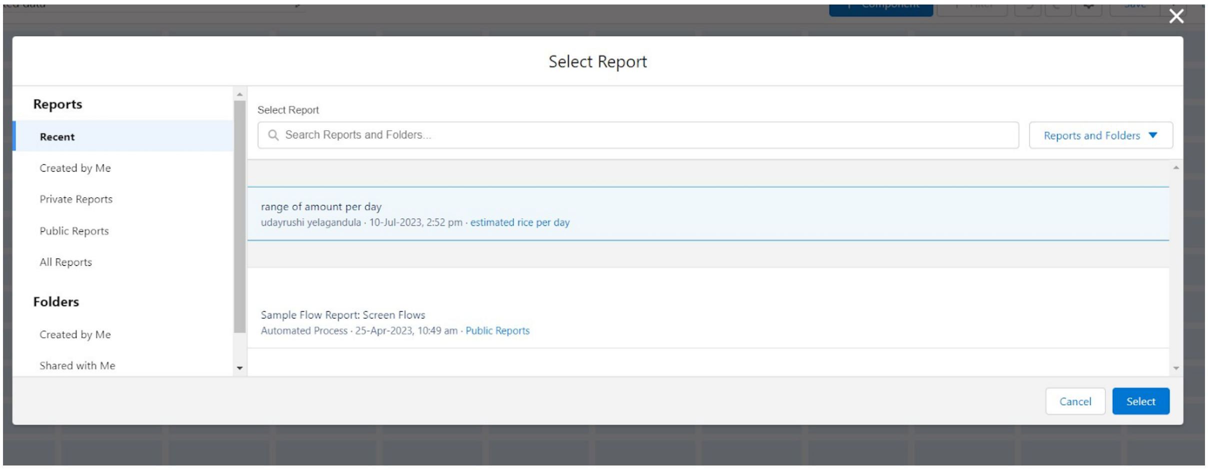
2. Give a Name and select the folder that was created, and click on create.



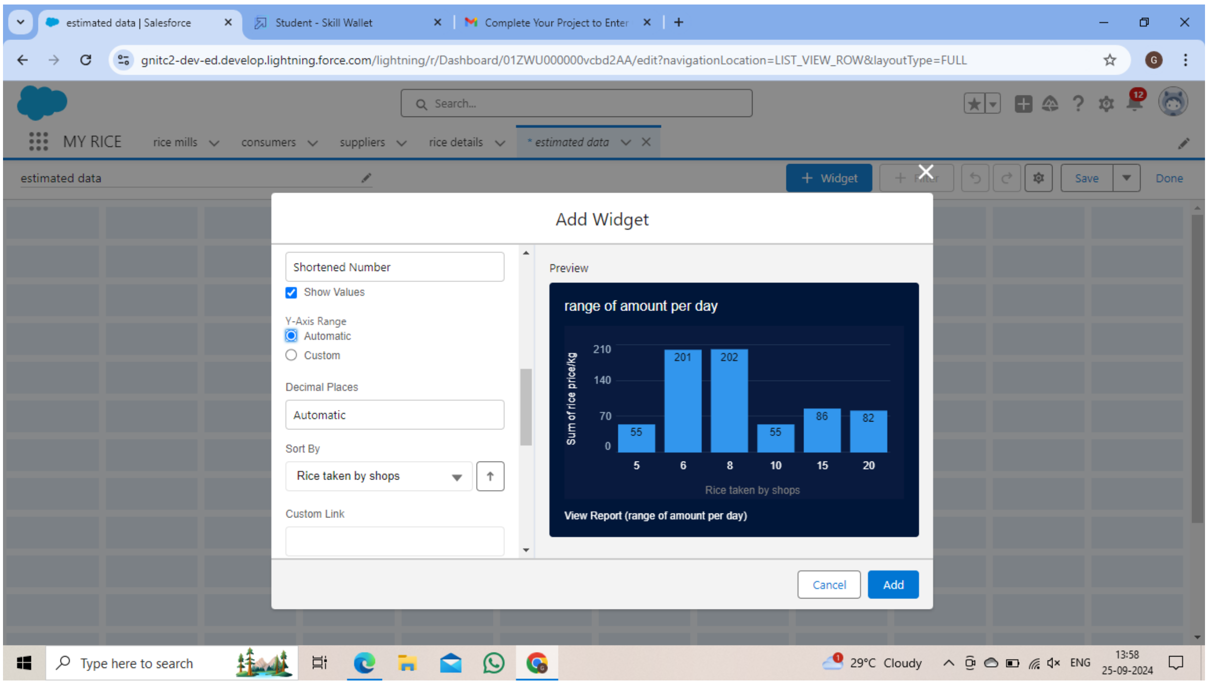
3.Select add component.



4.Select a Report and click on select.



1. Preview is shown below.



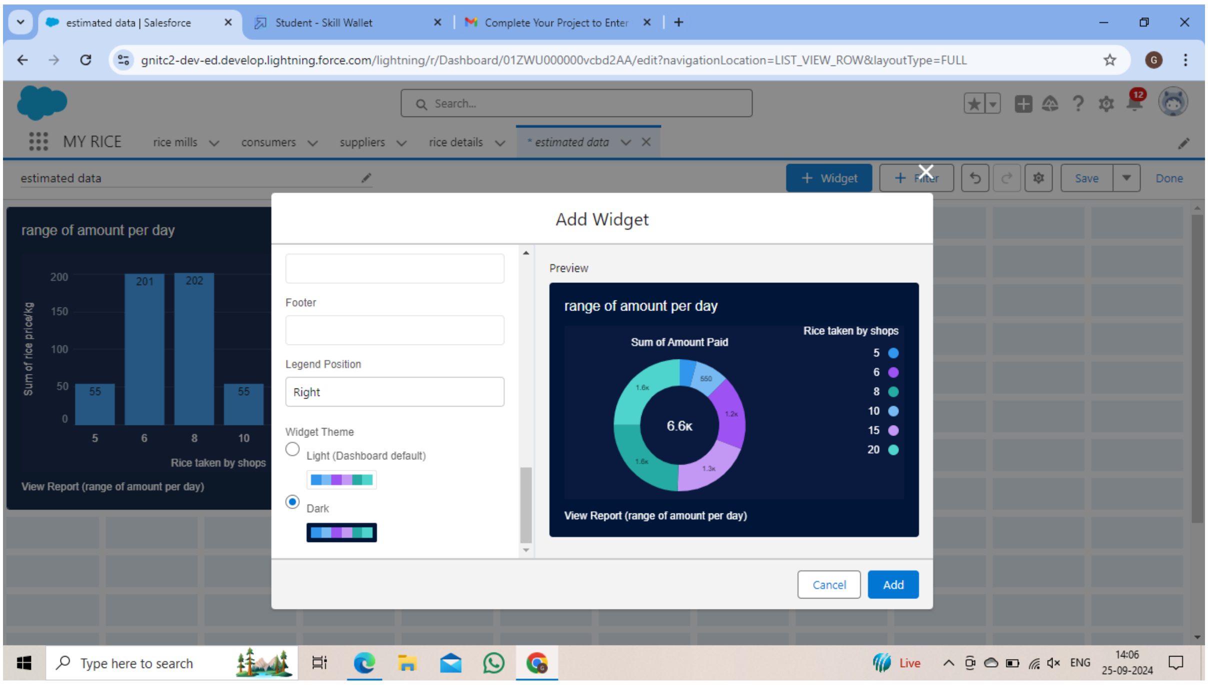
Display as>> vertical bar chart
X-axis >> rice taken by shops
Y-axis >> sum of amount
Y-axis range >> automatic
Sort by >> rice taken by shops
Component theme >> dark.

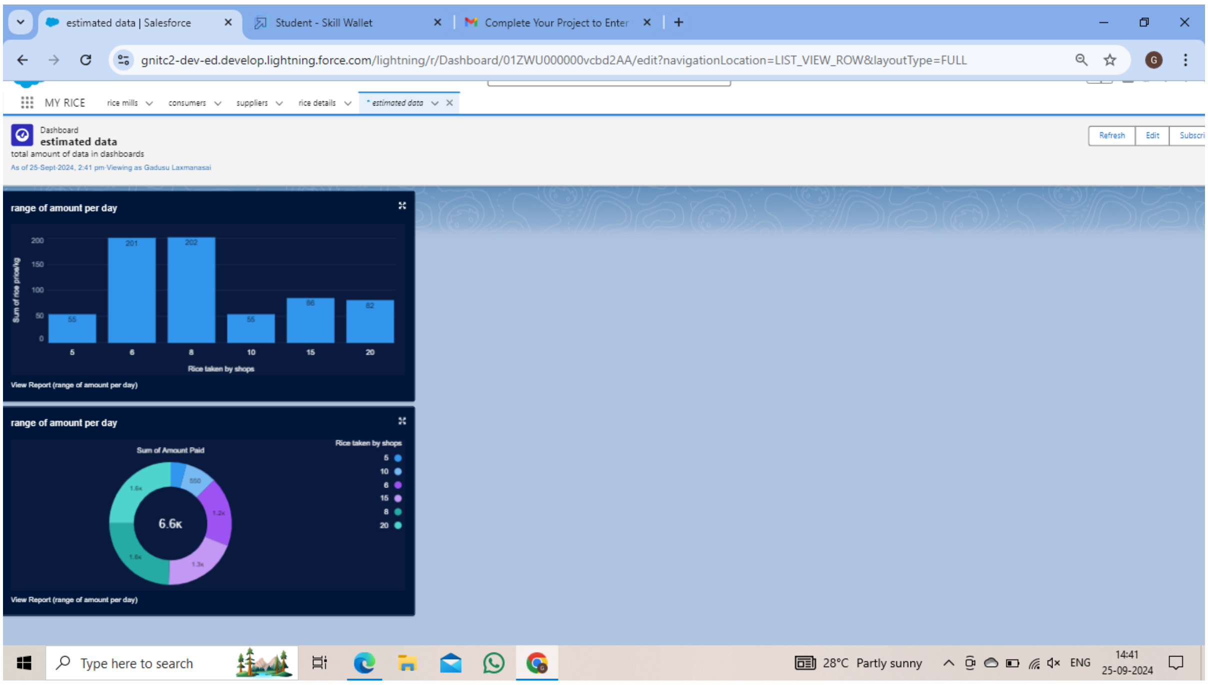
Add the component

Again select add component with above same steps
1.display as donut chart
2.sort by >> sum of amount
3.title>>range of amount per day
4.component theme dark

5,Click add.

6.Click save and done.

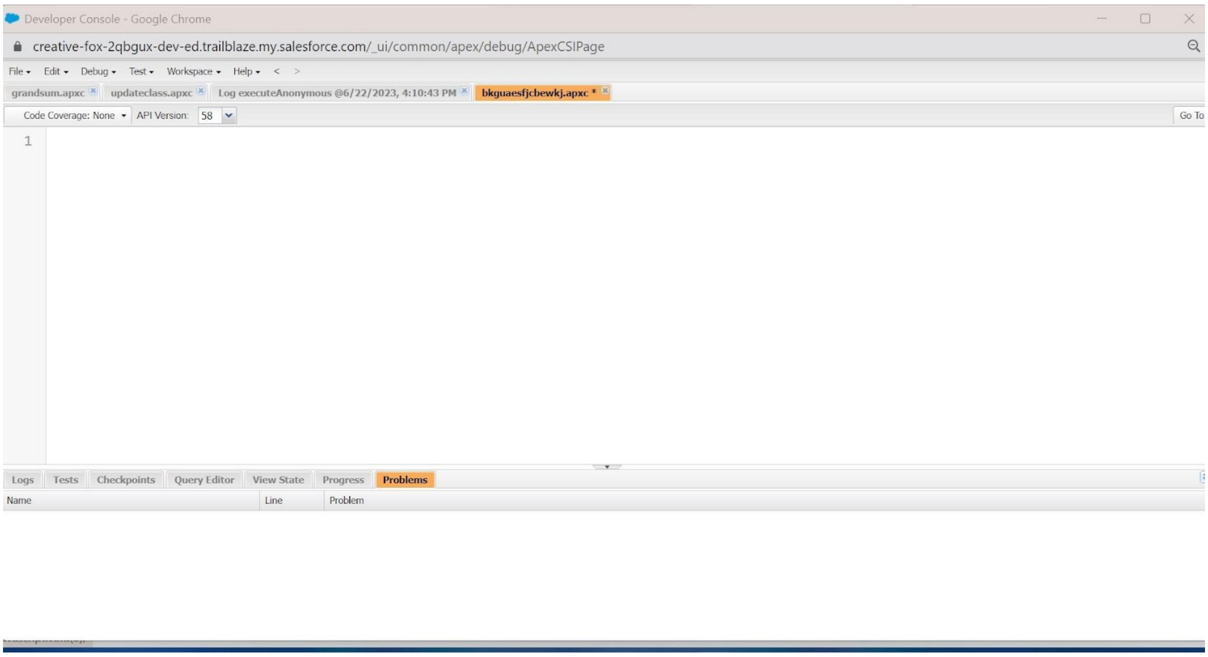




Task-34:

Creating an Apex Class(ConsumerRecord)

1. Login to the Salesforce account and navigate to the gear account in the top right corner.
2. Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.



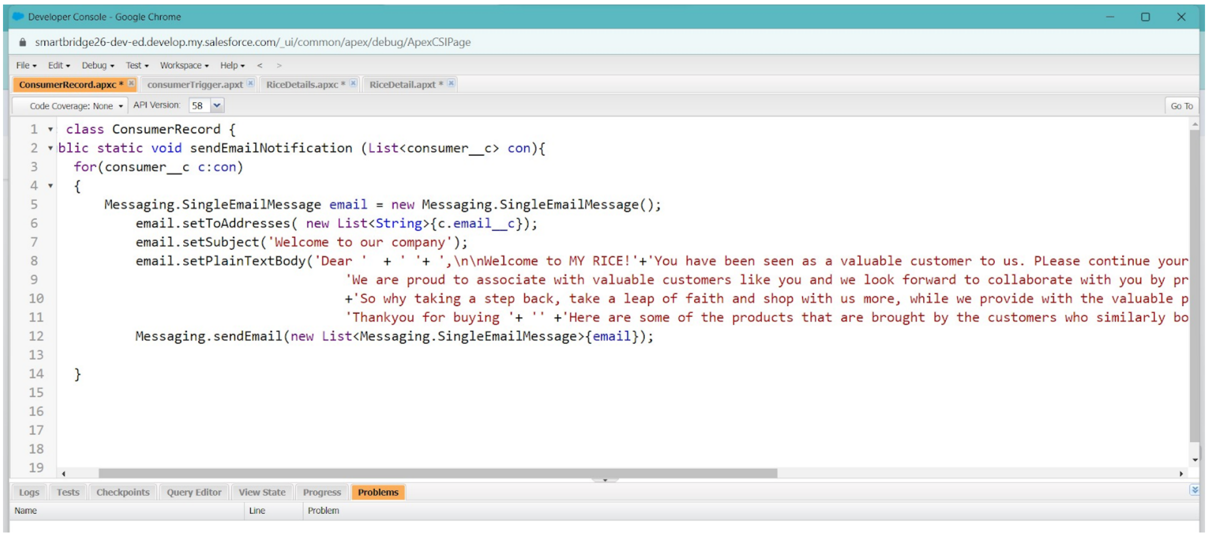
3.Then you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Class.
4.Enter the name of the class(ConsumerRecord) to create a new class file.

Code Snippet :

```
class ConsumerRecord {
    public static void sendEmailNotification (List<consumer__c> con){
        for(consumer__c c:con)
        {
            Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
                email.setToAddresses( new List<String>{c.email__c});
                email.setSubject('Welcome to our company');
                email.setPlainTextBody('Dear '  + ' '+ ',\n\nWelcome to MY RICE!'+'You have been seen
as a valuable customer to us. PLease continue your journey with us, while we try to provide you
with good quality resources.'+'\n'+
                                            "We are proud to associate with valuable customers like you and we
look forward to collaborating with you by providing more and more exciting discounts or even
product offers too.' + '\n'
                                            +'So why taking a step back, take a leap of faith and shop with us more,
```

```
while we provide with the valuable products and offers'+'\n'+'\n'+'\n'+
                                        'Thankyou for buying '+ '' +'Here are some of the products that are
brought by the customers who similarly bought products like this'+'\n\n');
               Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});

        }
    }
}
```



Task-35:

Creating an Apex Trigger

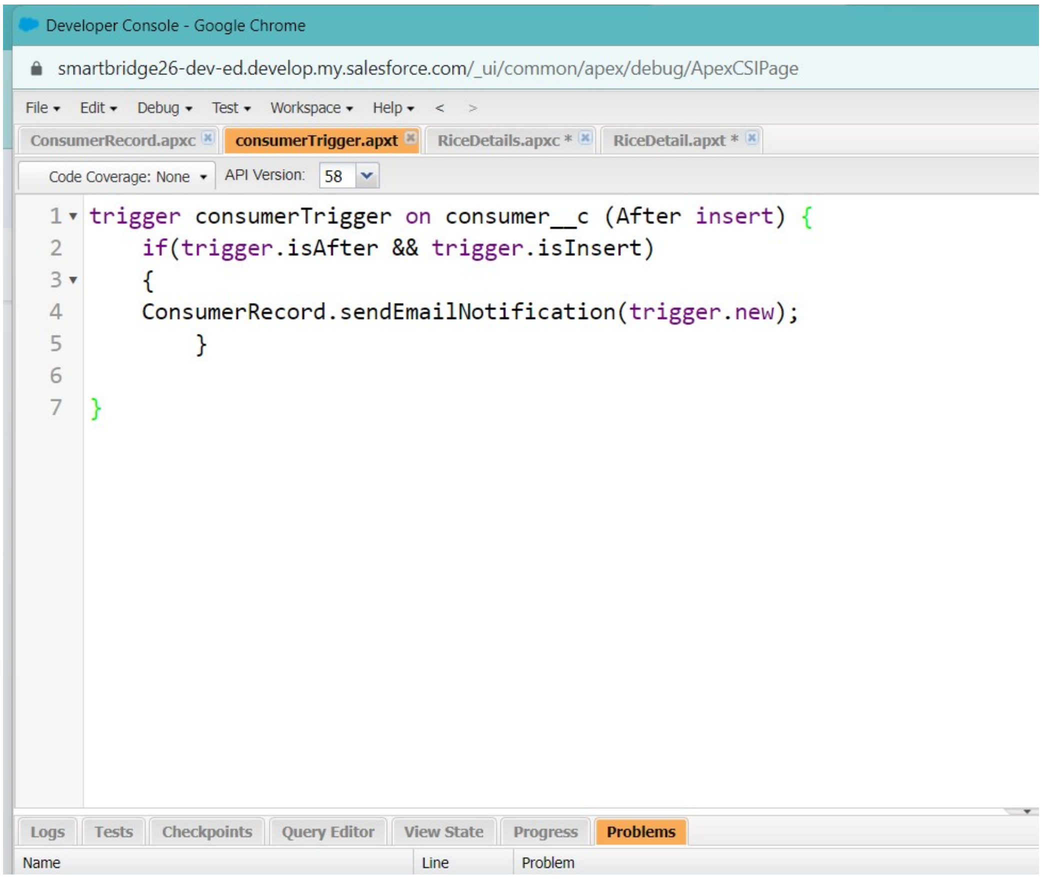
How to create a new trigger :
While still in the trailhead account, navigate to the gear icon in the top right corner.
Click on developer console and you will be navigated to a new console window.
Click on the File menu in the toolbar, and click on new? Trigger.
Enter the trigger name and the object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

Syntax For creating trigger :

```
The syntax for creating trigger is :
Trigger [trigger name] on [object name]( Before/After event)    {
//Trigger Logic
}
```

Trigger code:

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



THANK YOU