

OmA2B38A CRM APPLICATION FOR WHOLESALE RICE MILL

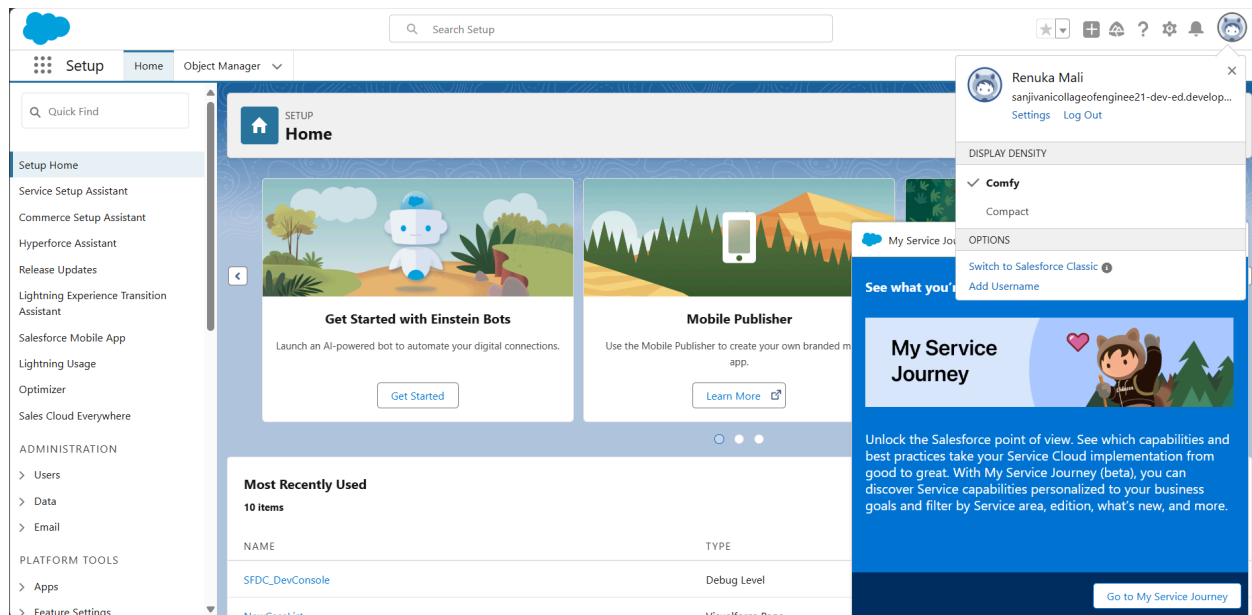
Prepared by ----Renuka Machhindra Mali

Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start 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?"

Task 1:- Creating Developer Account



Task 2:-Object

Create Supplier Object

The screenshot shows the Salesforce Setup interface for the 'supplier' object. The left sidebar contains a 'Details' menu with options: 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, and Scoping Rules. The main content area is titled 'Details' and contains the following information:

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	

On the right side, there is a user profile for 'Renuka Mali' with a 'Settings' link and a 'Log Out' button. Below the profile, there is a 'DISPLAY DENSITY' section with a 'Comfy' option selected, and an 'OPTIONS' section with links to 'Switch to Salesforce Classic' and 'Add Username'.

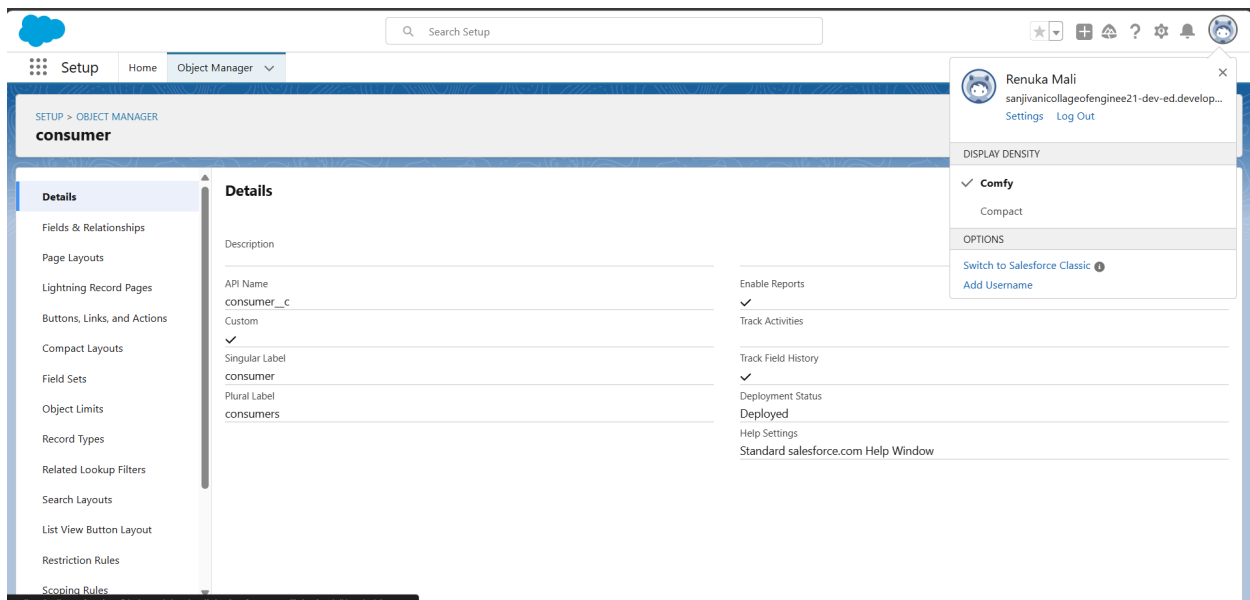
Create Rice mill Object

The screenshot shows the Salesforce Setup interface for the 'rice mill' object. The left sidebar contains a 'Details' menu with options: 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, and Scoping Rules. The main content area is titled 'Details' and contains the following information:

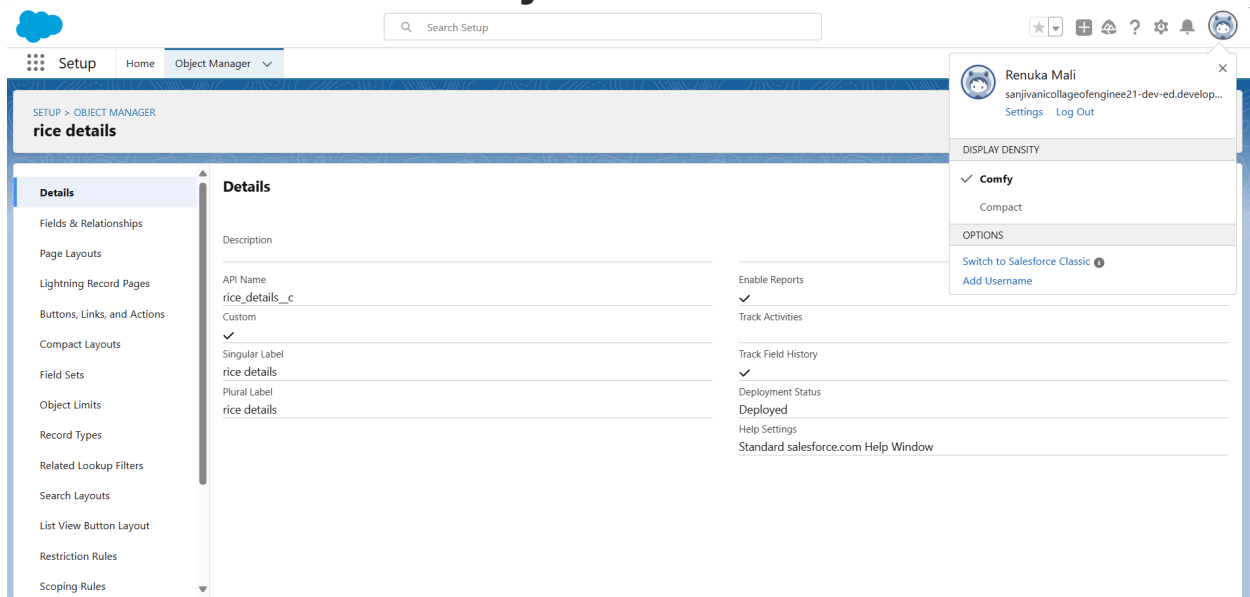
Details	
Description	
API Name	rice_mill__c
Custom	✓
Singular Label	rice mill
Plural Label	rice mills
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	
Standard salesforce.com Help Window	

On the right side, there is a user profile for 'Renuka Mali' with a 'Settings' link and a 'Log Out' button. Below the profile, there is a 'DISPLAY DENSITY' section with a 'Comfy' option selected, and an 'OPTIONS' section with links to 'Switch to Salesforce Classic' and 'Add Username'.

Create consumer Objects



Create rice details Objects



Task 3 :- Tabs

Creating a Custom Tab

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "tabs" entered. Under "User Interface", the "Rename Tabs and Labels" link is selected, and the "Tabs" link is highlighted. The main content area is titled "Custom Tabs" and includes a "Help for this Page" link. Below the title, there is an explanatory paragraph: "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."

There are four sections for creating tabs, each with a "New" button and a "What Is This?" link:

- Custom Object Tabs:** Contains a table with the following data:

Action	Label	Tab Style	Description
Edit Del	consumers	Box	
Edit Del	rice details	Bank	
Edit Del	rice mills	Balls	
Edit Del	supplier	Boat	
- Web Tabs:** No Web Tabs have been defined.
- Visualforce Tabs:** No Visualforce Tabs have been defined.
- Lightning Component Tabs:** No Lightning Component Tabs have been defined.

Task 4 :-Create a Lightning App

The screenshot shows the Salesforce Lightning App interface for the "supplier" object. The top navigation bar includes the "MY RICE" app name and a dropdown menu with "supplier", "rice mills", "consumers", and "rice details". The "supplier" dropdown is selected. The main content area shows the "supplier" object with a "New" button and a "What Is This?" link. Below this, there is a search bar with "Search this list..." and a "Filter" button. The table below the search bar is empty, with the message "No items to display." at the bottom.

Task 5:- Fields

Setup

Home

Object Manager

Search Setup

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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

List View Button Layout

Restriction Rules

Scoping Rules

Fields & Relationships

6 Items, Sorted by Field Label

Q 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)			
rice details Name	Name	Auto Number		✓	▼
rice distributed	rice_distributed__c	Number(5, 0)			▼
rice mill 1	rice_mill_1__c	Master-Detail(rice mill)		✓	▼
supplier Name	supplier_Name__c	Master-Detail(supplier)		✓	▼

Setup

Home

Object Manager

Search Setup

★

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👤

SETUP > OBJECT MANAGER

consumer

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

Scoping Rules

Fields & Relationships

14 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Amount Paid	Amount_Paid__c	Formula (Number)			▼
Consumer Name	Consumer_Name__c	Formula (Text)			▼
consumer Name	Name	Auto Number		✓	▼
Created By	CreatedById	Lookup(User)			
email	email__c	Email			▼
First name	First_name__c	Text(5)			▼
Last Modified By	LastModifiedById	Lookup(User)			
Last name	Last_name__c	Text(18)			▼
Mode of payment	Mode_of_payment__c	Picklist			▼

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

consumer

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

Scoping Rules

Fields & Relationships

14 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

email	email__c	Email	
First name	First_name__c	Text(5)	
Last Modified By	LastModifiedById	Lookup(User)	
Last name	Last_name__c	Text(18)	
Mode of payment	Mode_of_payment__c	Picklist	
Phone number	Phone_number__c	Phone	
rice mill name	rice_mill_name__c	Master-Detail(rice mill)	✓
Rice taken by shops	Rice_taken_by_shops__c	Number(5, 0)	
rice taken by shops in kgs	rice_taken_by_shops_in_kgs__c	Number(18, 0)	
Rice type	Rice_type__c	Picklist	

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

supplier

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

Scoping Rules

Fields & Relationships

5 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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

The screenshot shows the 'Fields & Relationships' page for the 'rice mill' object in Salesforce Setup. The left sidebar contains a navigation menu with options like Details, Fields & Relationships (selected), 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, and Scoping Rules. The main content area displays a table of fields with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. There are 8 items listed, sorted by Field Label.

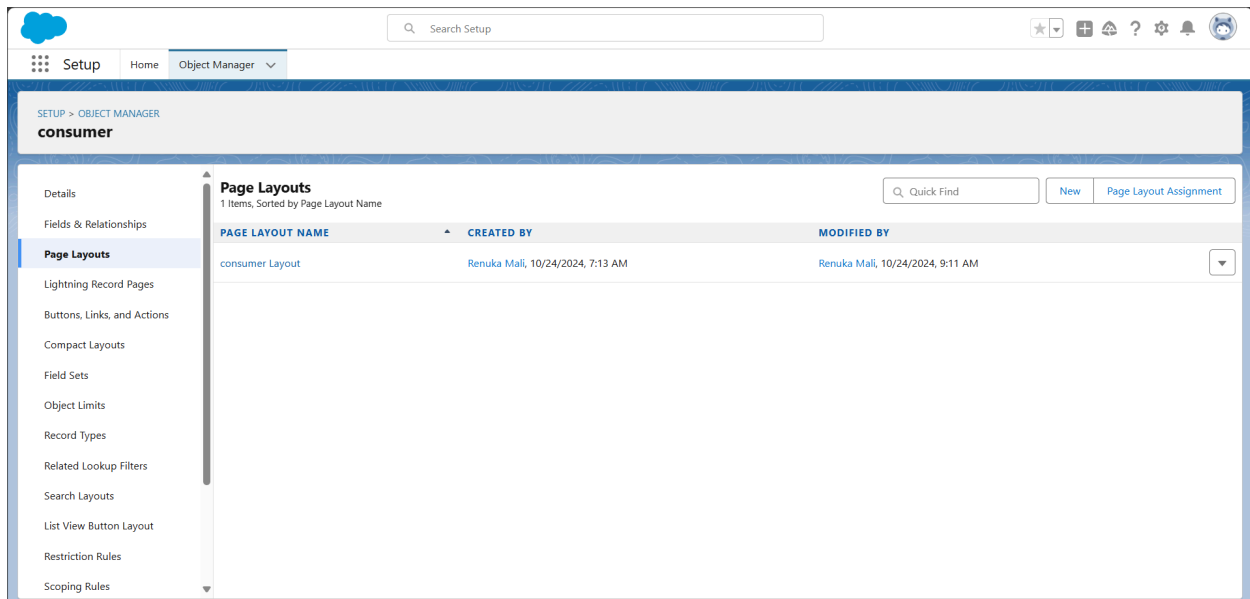
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
rice distributed to shops	rice_distributed_to_shops__c	Roll-Up Summary (SUM rice details)		
rice mill Name	Name	Auto Number		✓
rice price/kg	rice_price_kg__c	Number(5, 0)		
rice taken	rice_taken__c	Roll-Up Summary (SUM consumer)		
sum of rice distributed	sum_of_rice_distributed__c	Roll-Up Summary (SUM rice details)		

validation rule

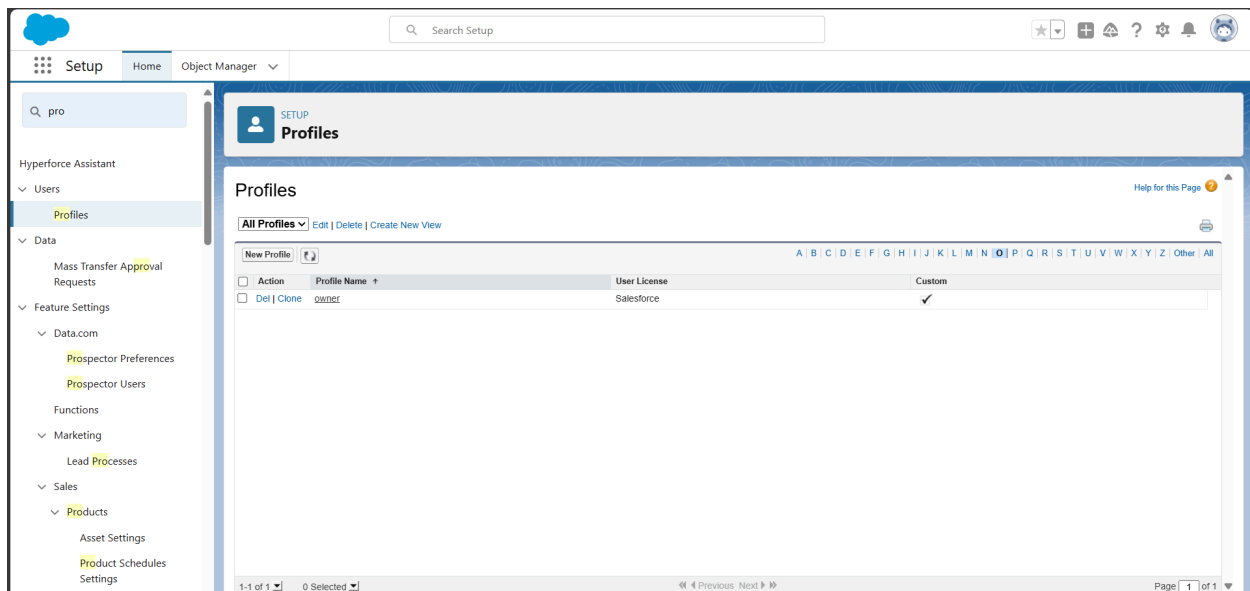
The screenshot shows the 'Validation Rules' page for the 'consumer' object in Salesforce Setup. The left sidebar is identical to the previous screenshot, with 'Fields & Relationships' selected. The main content area displays a table of validation rules with columns: RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, and MODIFIED BY. There is 1 item listed, sorted by Rule Name.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Phonenumberoremailblankrule	Top of Page	please fill in your phone number.	✓	Renuka Mali, 10/24/2024, 8:50 AM

Task 6:-Page layouts



Task 7:- Profiles Creation



Setup Home Object Manager

Search Setup

pro

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

Product Schedules

Settings

Product Settings

SETUP Profiles

Profiles

All Profiles Edit Delete Create New View

New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/> Del Clone	employer	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Clone	External Apps Login User	External Apps Login	<input type="checkbox"/>
<input type="checkbox"/> Clone	External Identity User	External Identity	<input type="checkbox"/>

1-3 of 3 0 Selected

Page 1 of 1

Setup Home Object Manager

Search Setup

pro

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

Product Schedules

Settings

Product Settings

SETUP Profiles

Profiles

All Profiles Edit Delete Create New View

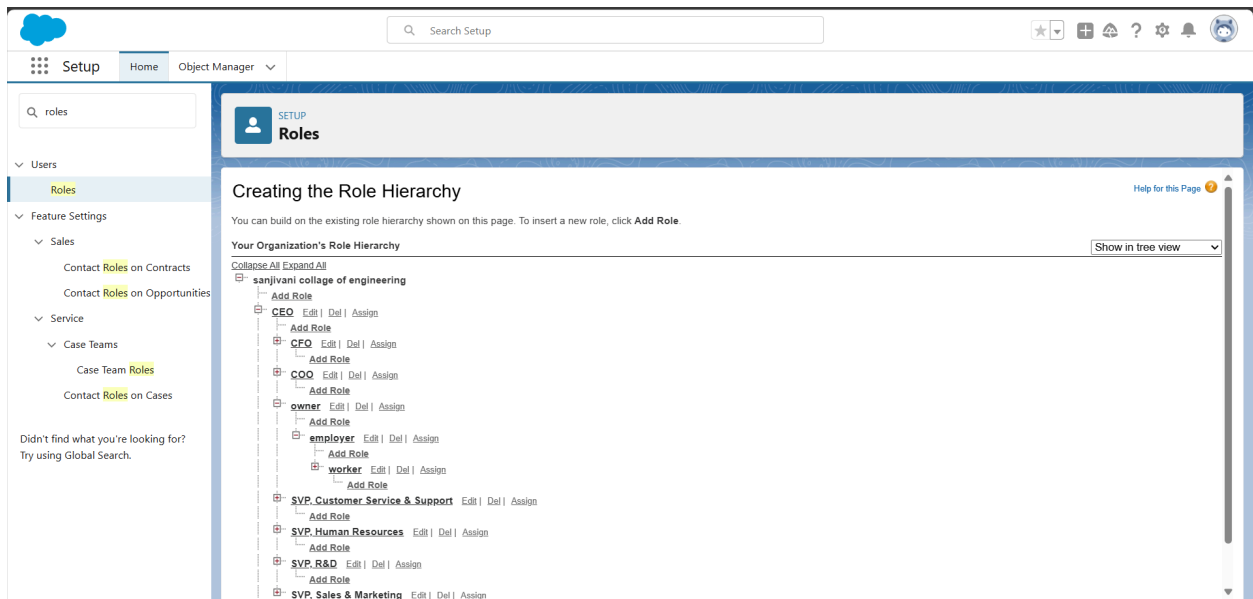
New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/> Clone	Work.com Only User	Work.com Only	<input type="checkbox"/>
<input type="checkbox"/> Del Clone	worker	Salesforce	<input checked="" type="checkbox"/>

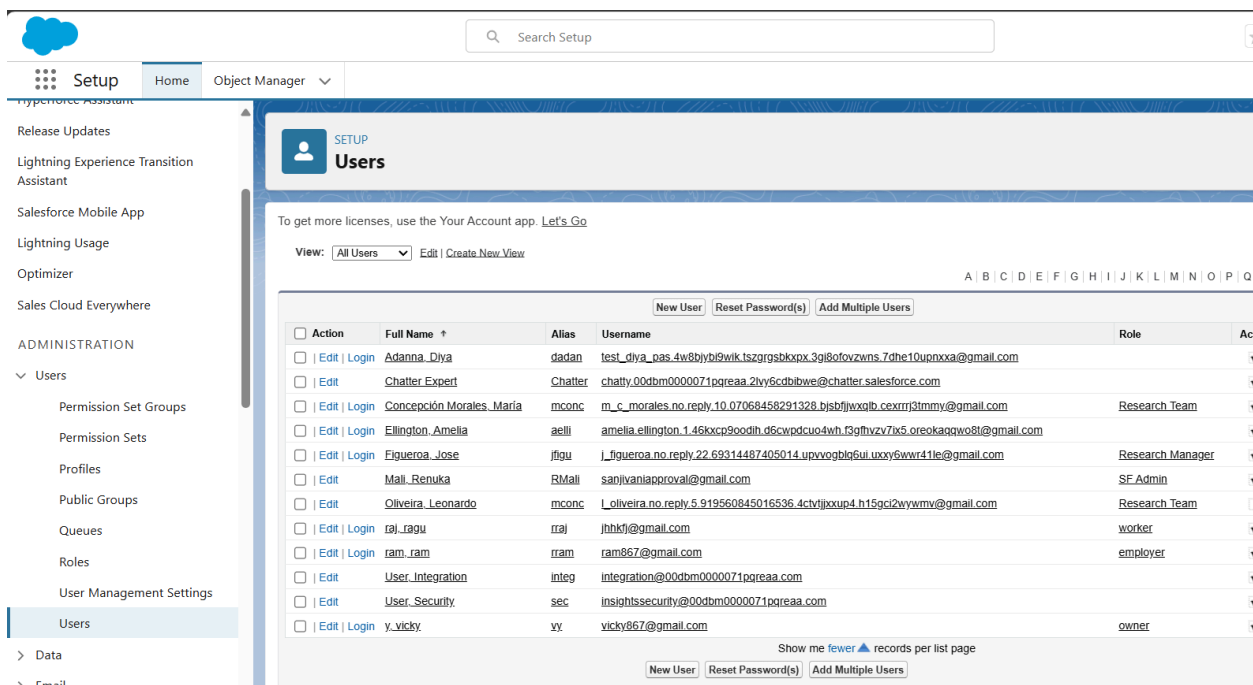
1-2 of 2 0 Selected

Page 1 of 1

Task 9:- Role Creation



Task10:- Users



Task 11:-Creating OWD setting

Reports

Recent

2 items

Q Search recent reports...

New Report

New Folder

⚙

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed	
Recent	range of amount per day		Private Reports	Renuka Mali	10/24/2024, 10:10 PM	✓	⌵
Created by Me							
Private Reports	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	7/25/2024, 10:56 PM		⌵
Public Reports							
All Reports							
FOLDERS							
All Folders							
Created by Me							
Shared with Me							
FAVORITES							
All Favorites							

Reports

All Reports

7 items

Q Search all reports...

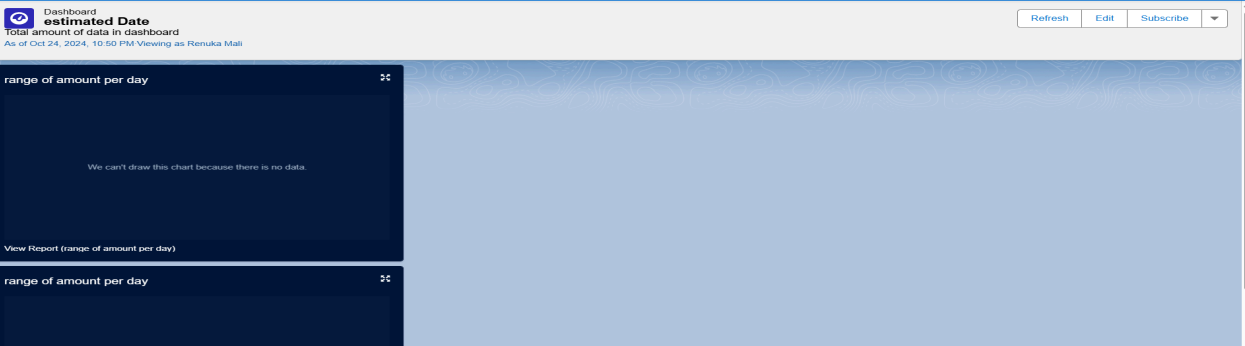
New Report

New Folder

⚙

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed	
Recent	range of amount per day		estimated rice per day	Renuka Mali	10/24/2024, 10:10 PM	✓	⌵
Created by Me							
Private Reports	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	7/25/2024, 10:56 PM		⌵
Public Reports							
All Reports	Sample Report: Orchestration Run Logs	What orchestration run logs were created and what happened in their associated orchestration runs?	Public Reports	Automated Process	7/25/2024, 10:56 PM		⌵
FOLDERS							
All Folders	Sample Report: Orchestration Runs	What orchestration runs have been created and what's the current status of each run?	Public Reports	Automated Process	7/25/2024, 10:56 PM		⌵
Created by Me							
Shared with Me	Sample Report: Orchestration Stage Runs	What orchestration stage runs have been created and what's the current status of each run?	Public Reports	Automated Process	7/25/2024, 10:56 PM		⌵
FAVORITES							
All Favorites	Sample Report: Orchestration Step Runs	What orchestration step runs have been created and what's the current status of each run?	Public Reports	Automated Process	7/25/2024, 10:56 PM		⌵
	Sample Report: Orchestration Work Items	What orchestration work items were created and what's the current status of each work item?	Public Reports	Automated Process	7/25/2024, 10:56 PM		⌵

Task 13:- Dashboards



Task 14:-Creating an Apex Class(ConsumerRecord)

The image shows two screenshots of an IDE, likely Salesforce Developer, illustrating the creation of an Apex class and a trigger.

Top Screenshot: The file explorer shows two files: `ConsumerRecord.apex` and `consumerTrigger.apxt`. The `ConsumerRecord.apex` file is open, displaying the following code:

```
1 class ConsumerRecord {
2     public static void sendEmailNotification (List<consumer__c> con){
3         for(consumer__c c:con)
4         {
5             Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
6             email.setToAddresses( new List<String>{c.email__c});
7             email.setSubject('Welcome to our company');
8             email.setPlainTextBody('Dear ' + ' ' + ',\n\nWelcome to MY RICE!'+'You have been seen as a valuable customer to us. Please continue y
9                 + 'So why taking a step back, take a leap of faith and shop with us more, while we provide with the valuabl
10                'Thankyou for buying ' + ' ' + 'Here are some of the products that are brought by the customers who similarly
11            Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
12        }
13    }
14 }
15 }
```

Bottom Screenshot: The `consumerTrigger.apxt` file is open, displaying the following code:

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