# A CRM APPLICATION FOR WHOLESALE RICE MILL

# INTRODUCTION

## Salesforce

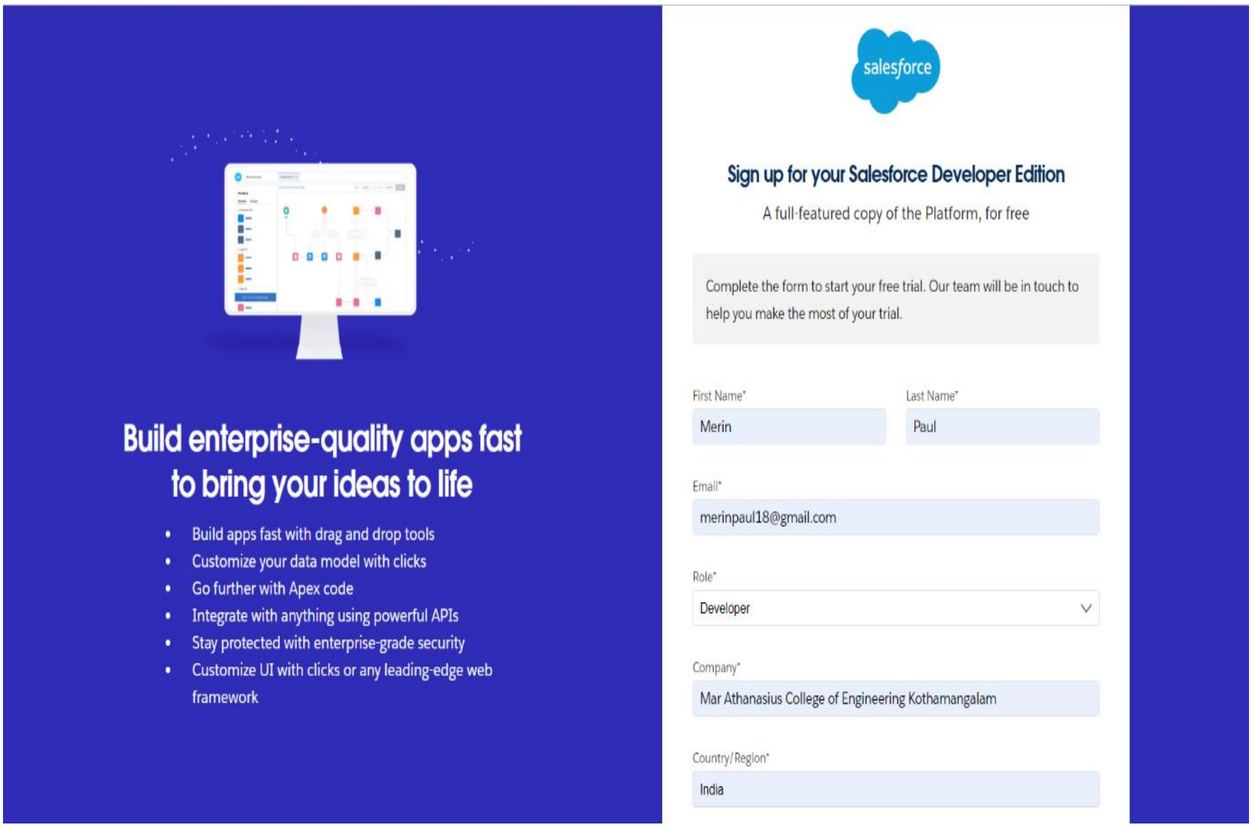
Salesforce is a cloud-based customer relationship management (CRM) platform that helps businesses manage and streamline their sales, marketing, customer service, and other operations. It offers a wide range of services and products designed to improve relationships with customers and drive growth. Salesforce is known for its flexibility, scalability, and integration capabilities, making it a popular choice for businesses of all sizes across various industries. It also provides tools for analytics, community building, and application development through its AppExchange marketplace.

The Rice Mill CRM Application is a comprehensive solution designed to streamline and simplify how much rice per day, how many were sold that rice and which type of rice all reports send to owners daily wise. It leverages the power of customer relationship management (CRM) to enhance customer experiences, optimize store operations, and improve overall efficiency in the rice mill factory. This project aims to develop a user-friendly and feature-rich application that addresses the specific needs of a rice mill factory.

## Creating developer account

Steps for creating a developer org in salesforce.

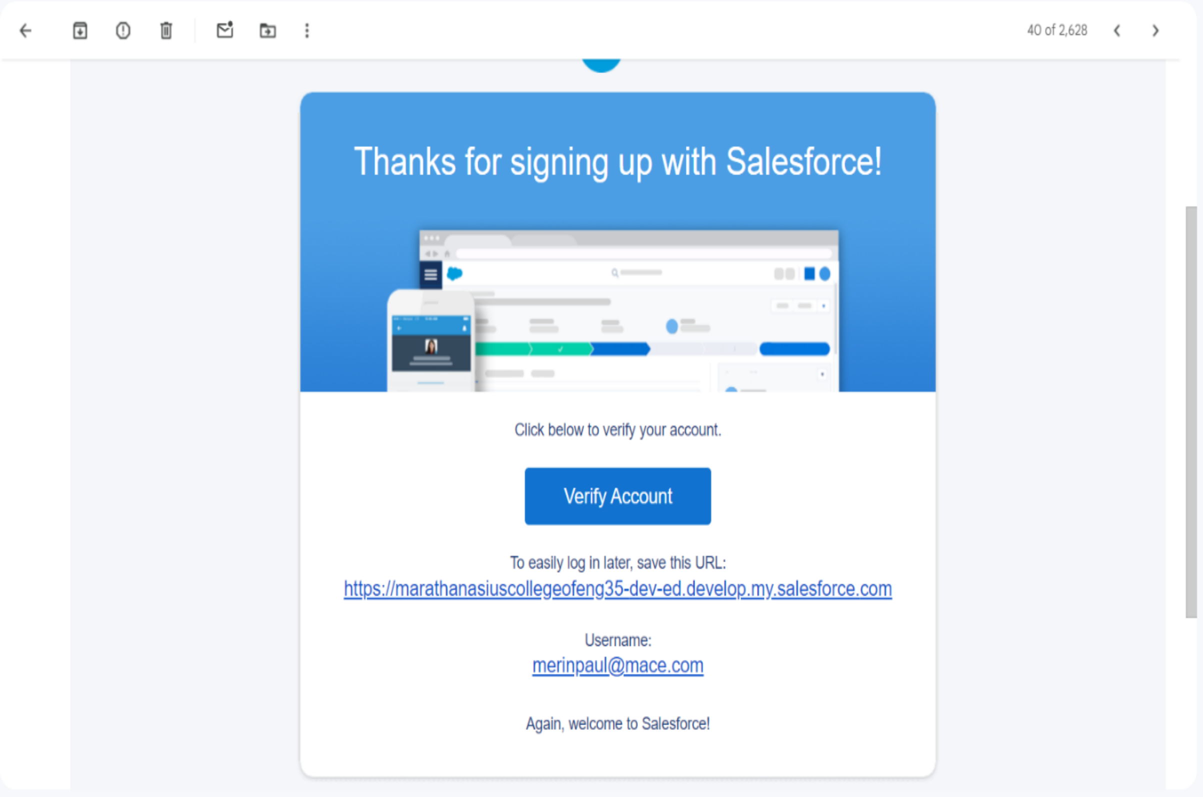
1. Go to https://developer.salesforce.com/signup
2. On the sign-up form, enter the details.



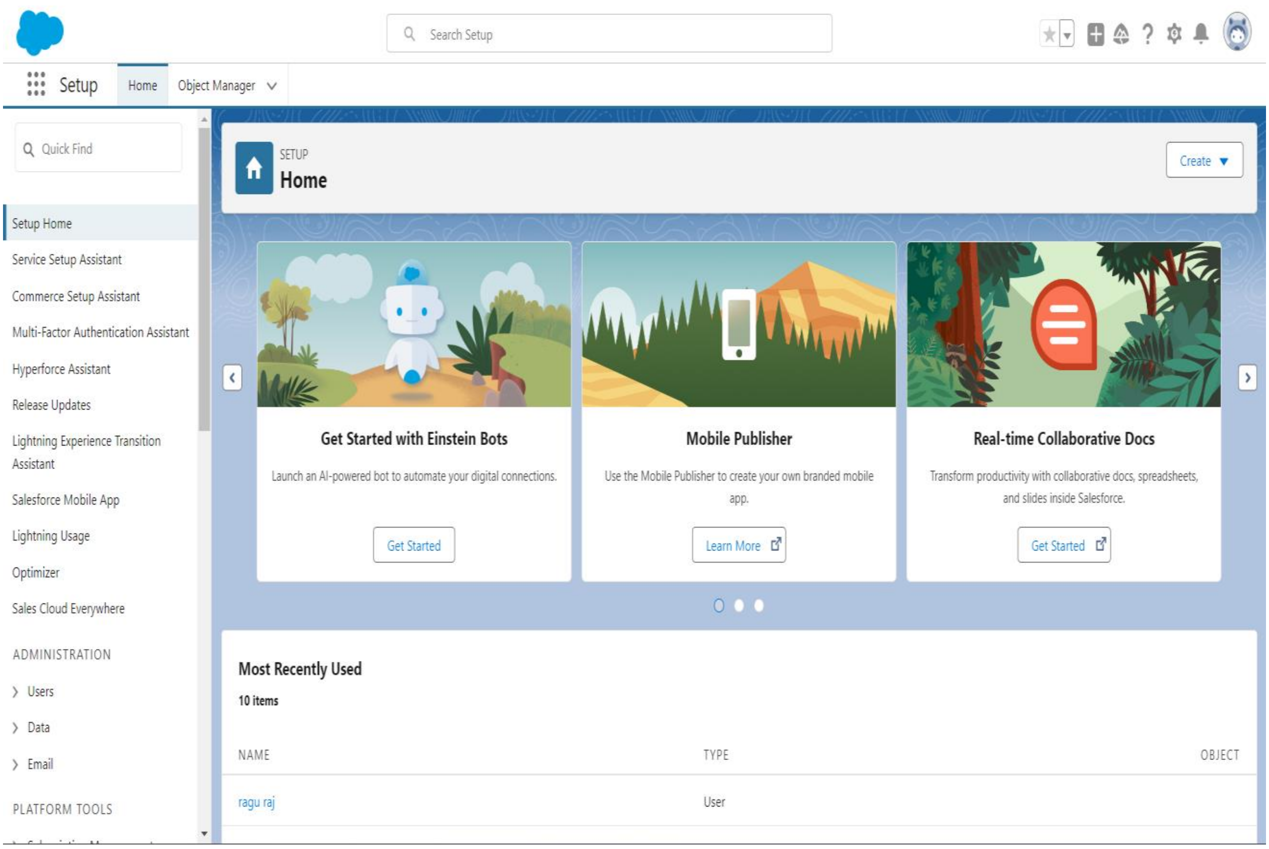

3. Click on sign me up after filling these.

# Account activation

1. Go to the inbox of the email that was used while signing up. Click on the verify account to activate the account.
2. Click on Verify Account




3. Give a password and answer a security question and click on change password.
4. Then it will be redirected to the salesforce setup page.



# OBJECT

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

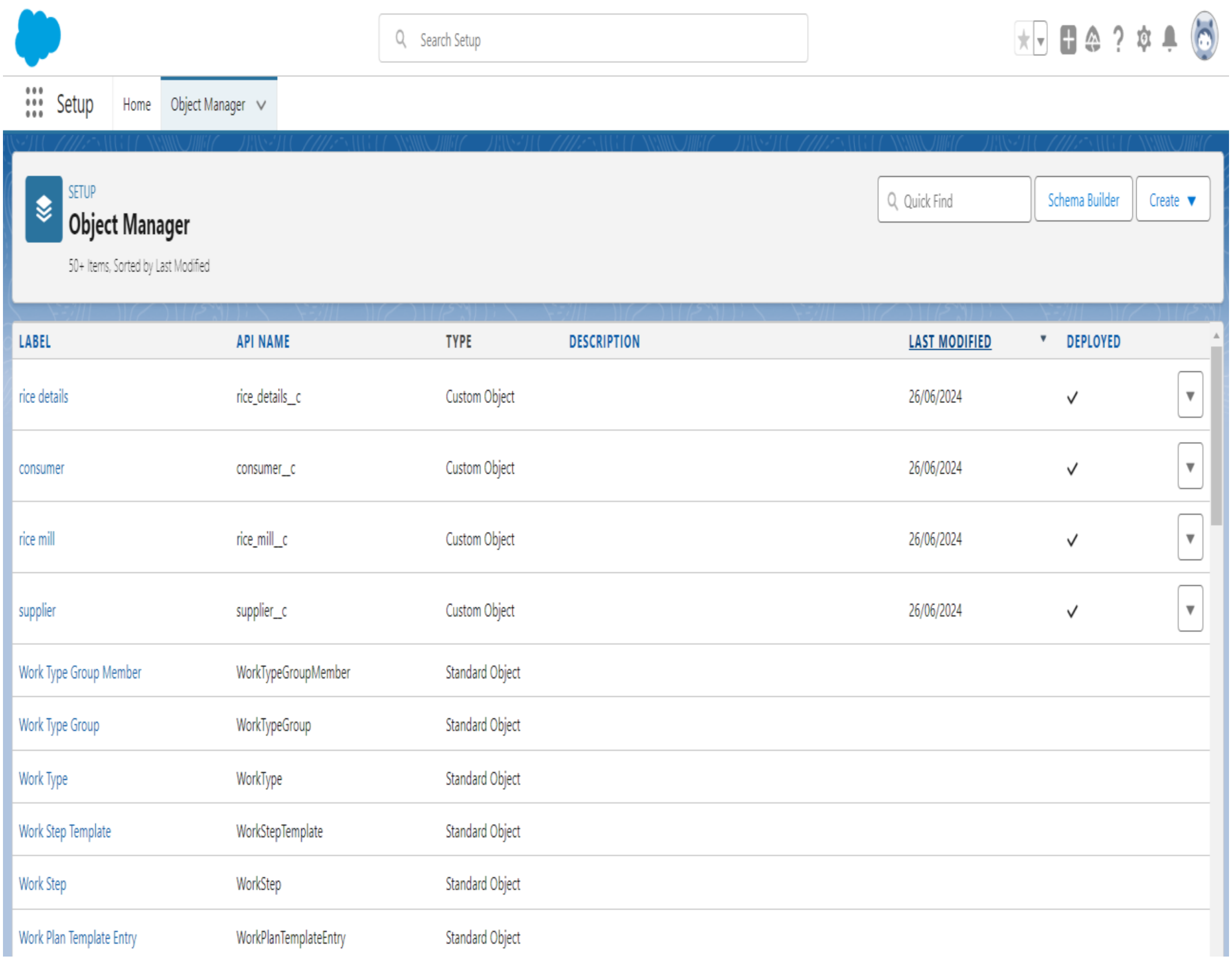
**Salesforce objects are of two types:**

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

**Steps for creating custom objects:**

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

Four custom objects have been created: Supplier, Rice Mill, Consumer, and Rice Details.

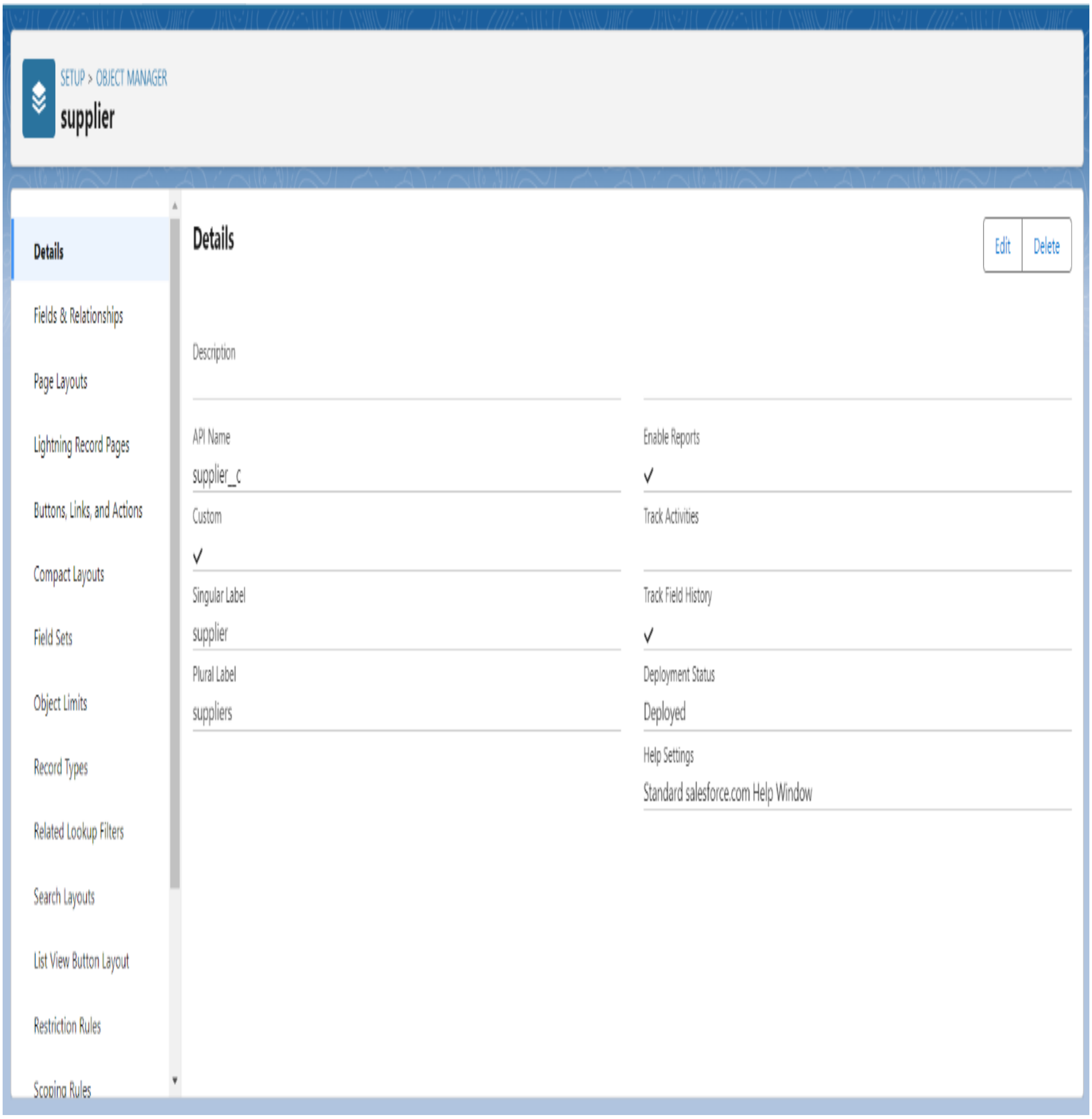



| LABEL | API NAME | TYPE | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|---|---|---|---|---|---|
| rice details | rice_details_c | Custom Object | | 26/06/2024 | ✓ |
| consumer | consumer_c | Custom Object | | 26/06/2024 | ✓ |
| rice mill | rice_mill_c | Custom Object | | 26/06/2024 | ✓ |
| supplier | supplier_c | Custom Object | | 26/06/2024 | ✓ |
| Work Type Group Member | WorkTypeGroupMember | Standard Object | | | |
| Work Type Group | WorkTypeGroup | Standard Object | | | |
| Work Type | WorkType | Standard Object | | | |
| Work Step Template | WorkStepTemplate | Standard Object | | | |
| Work Step | WorkStep | Standard Object | | | |
| Work Plan Template Entry | WorkPlanTemplateEntry | Standard Object | | | |

# Supplier Object

**Steps to create supplier object**:

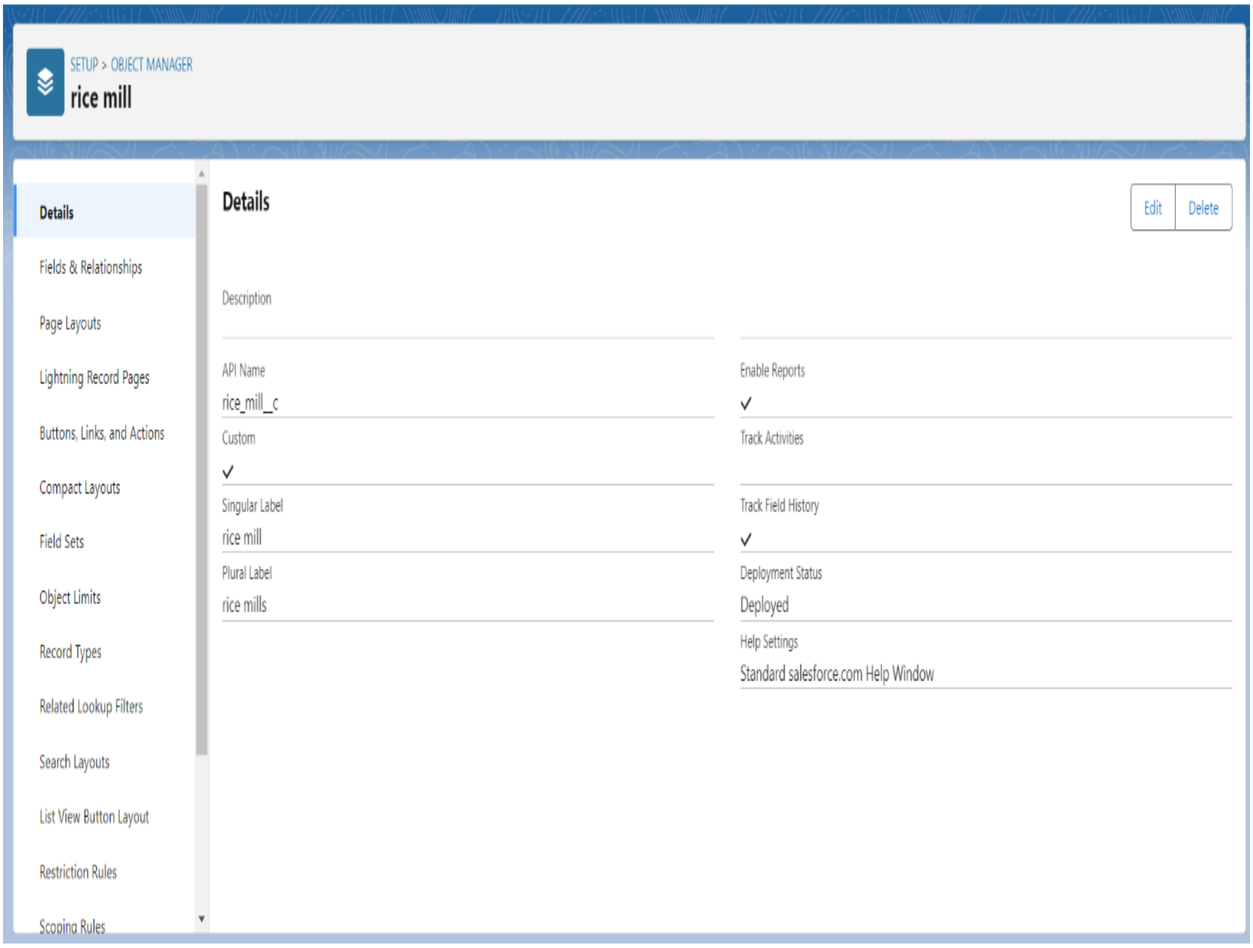
1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
    1) Enter the label name→ **supplier**
    2) Plural label name→ suppliers
    3) Enter Record Name Label and Format
        - Record Name → supplier Name
        - Data Type → Text
2. Click on Allow reports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



# Rice mill Object

**Steps to create rice mill 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.
3. Allow search → **Save.**



# Consumer object

Steps to create consumer object:

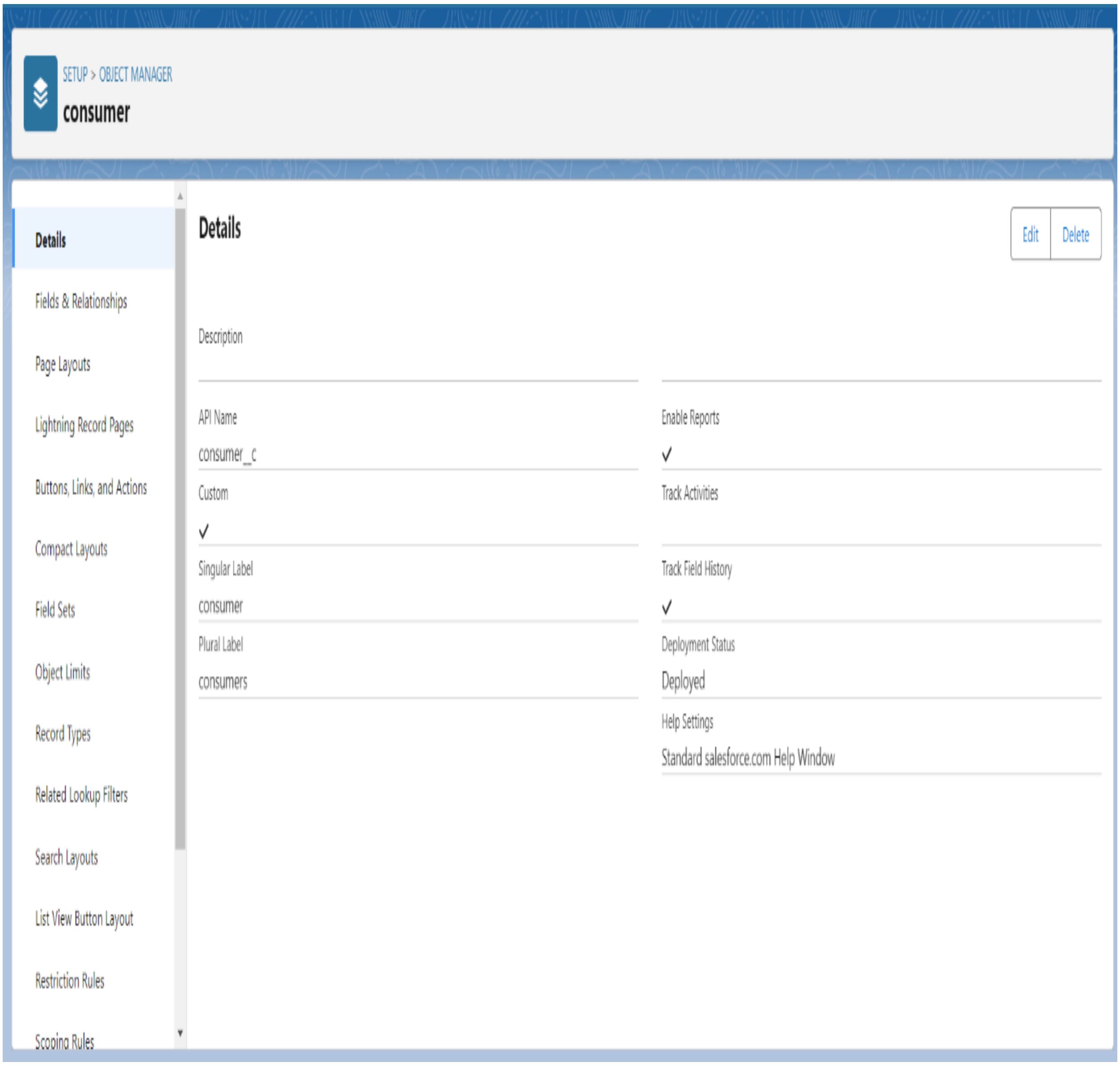
1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.

   label name → **consumer**

   Plural label name → **consumers**

   Display Format → **consumers**-{000}

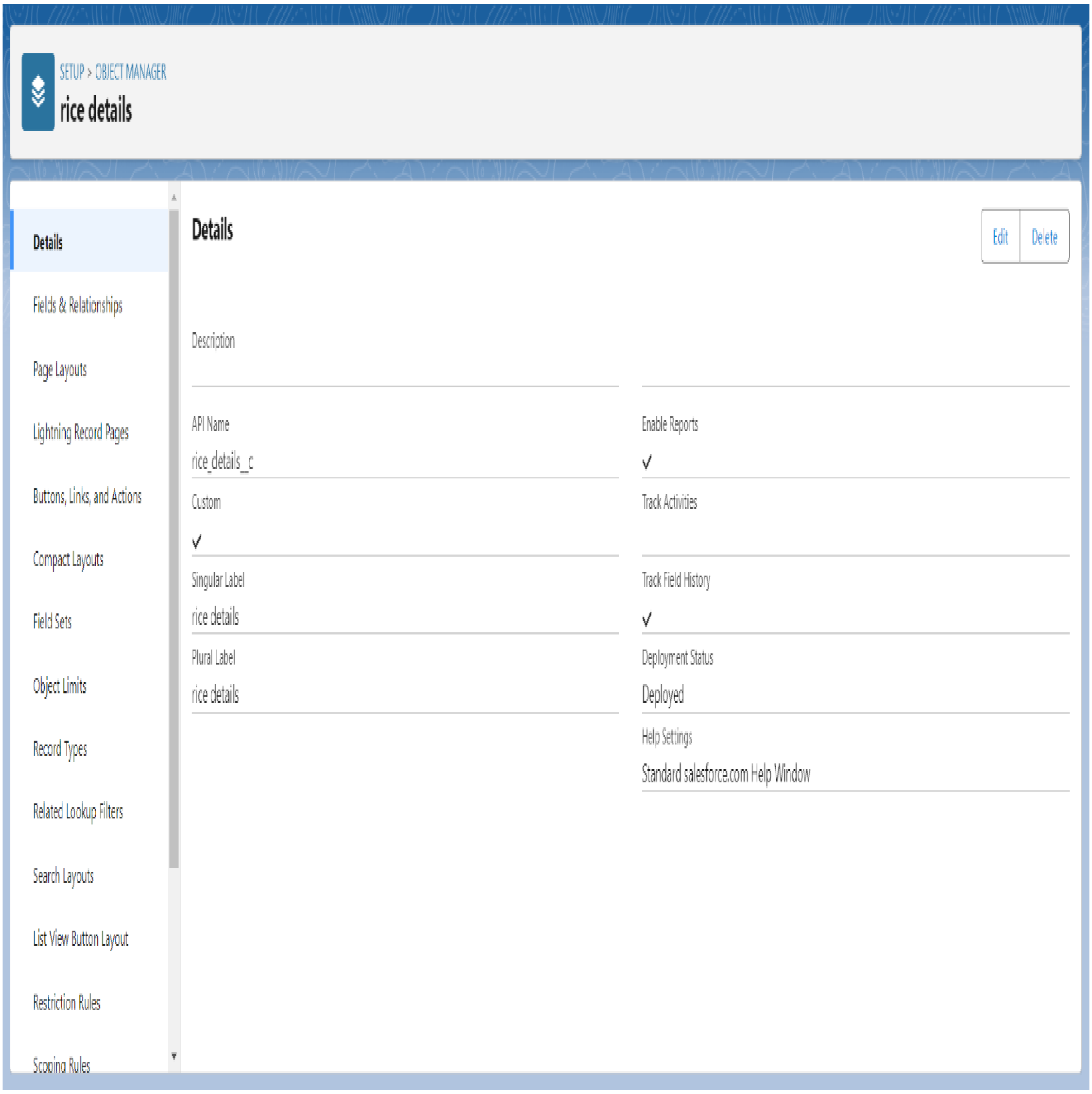
   Starting number → 1
2. Click on Allow reports and Track Field History, Allow Search.
3. Allow search → **Save.**



# Rice Detail Object

Steps to create rice detail object:

1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
   - label name → rice details
   - Plural label name → rice details
   - Display Format → rice-{000}
   - Starting number → 1
2. Click on Allow reports and Track Field History, Allow Search.
3. Allow search → **Save.**



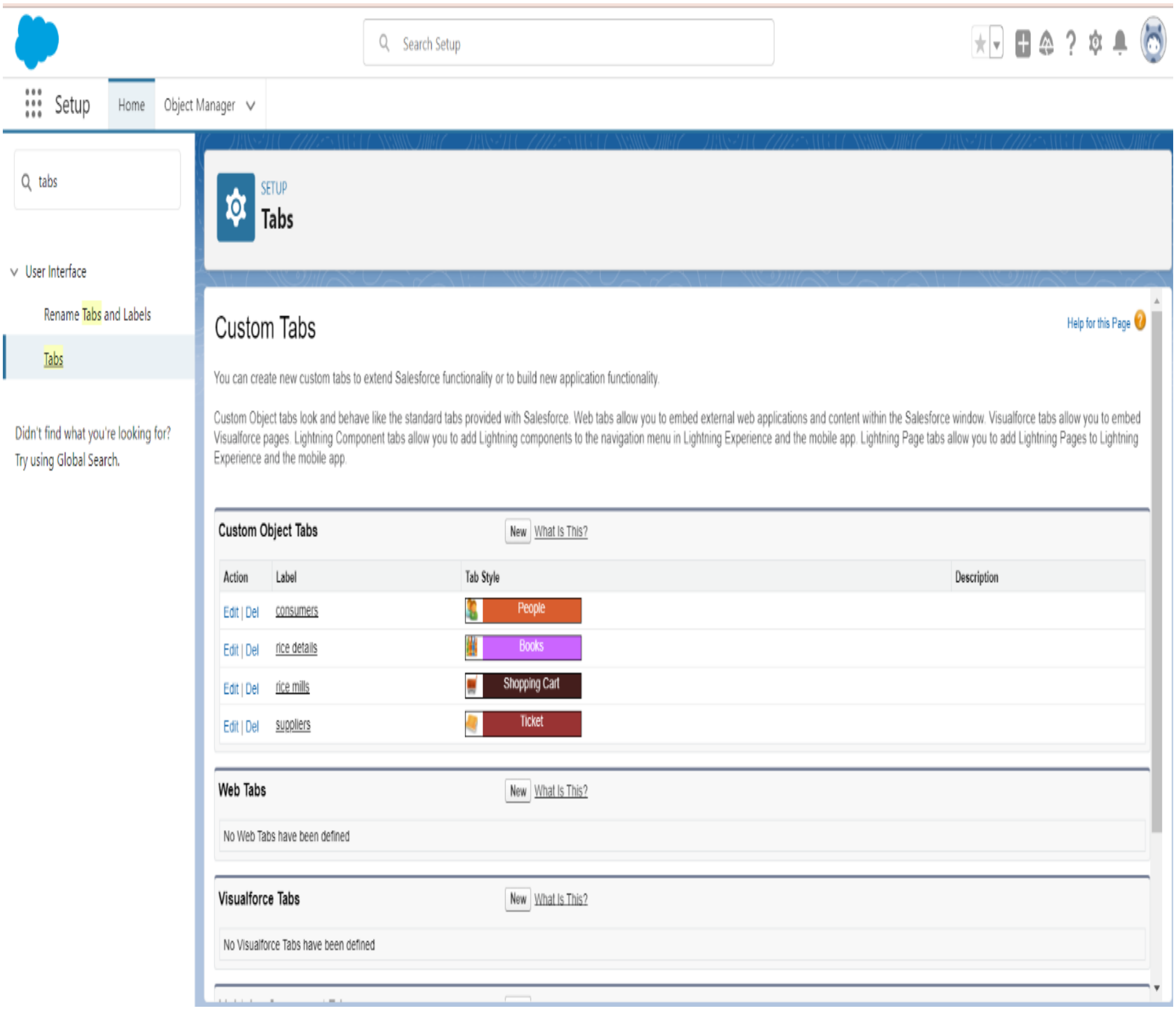
# TABS

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

Custom object tabs are the user interface for custom applications that is built in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

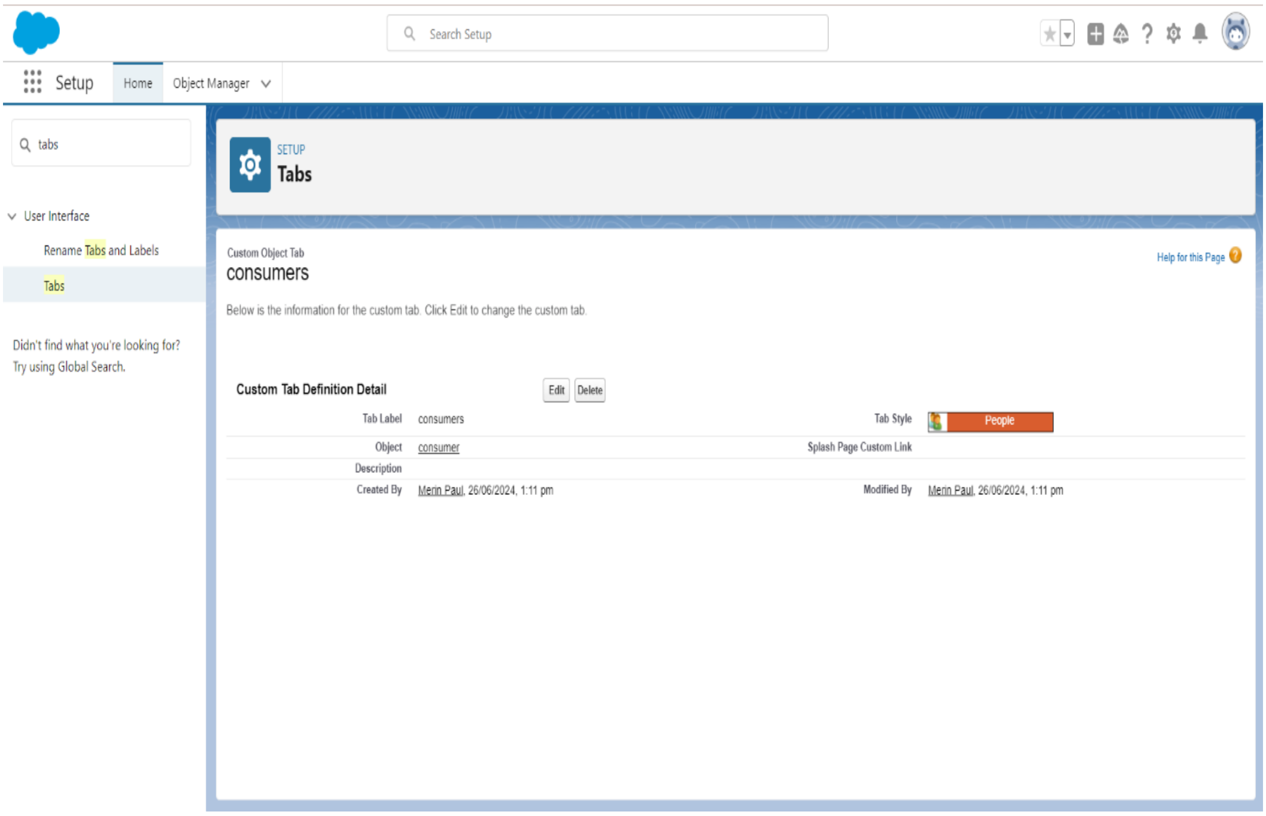
**Steps for creating custom tabs:**

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

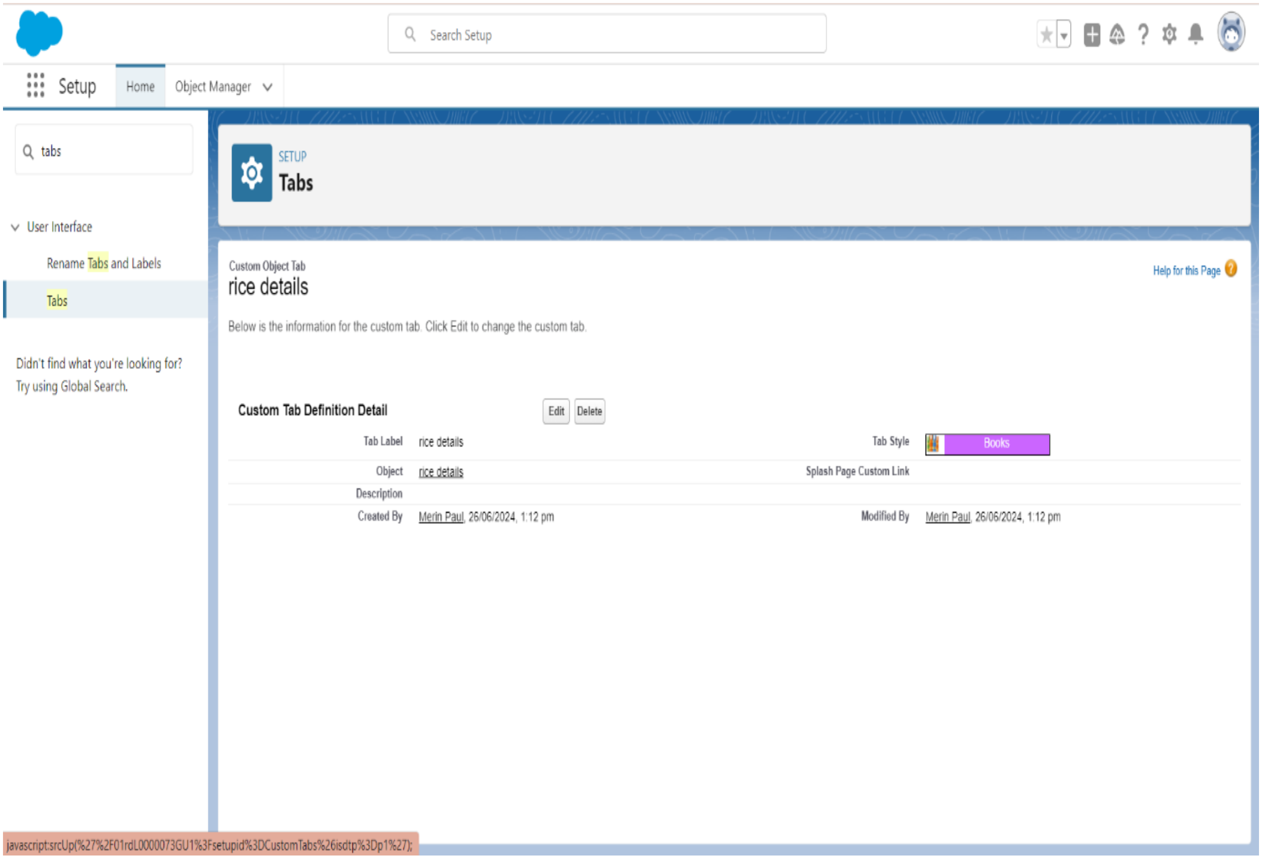



Four custom tabs were created for the four objects Supplier, Rice mill, Consumer and Rice details

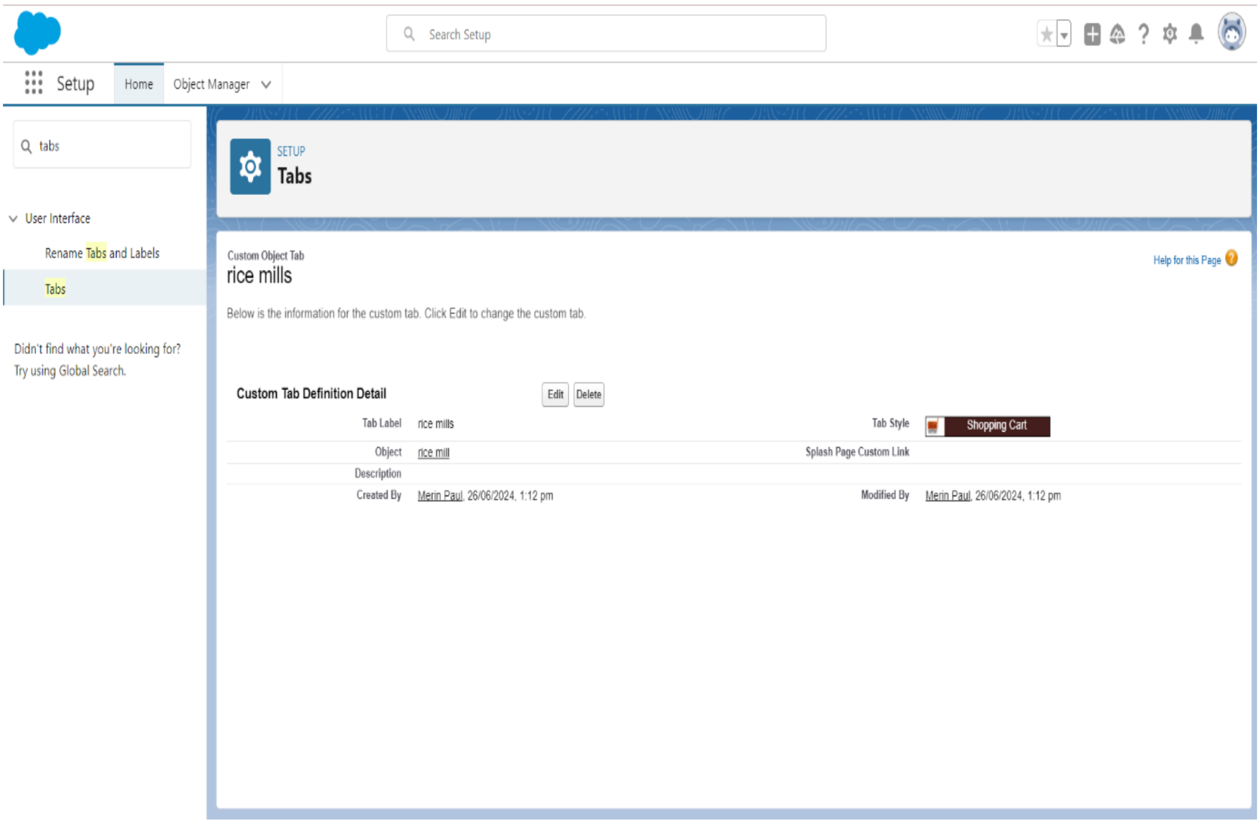
# Consumers Tab



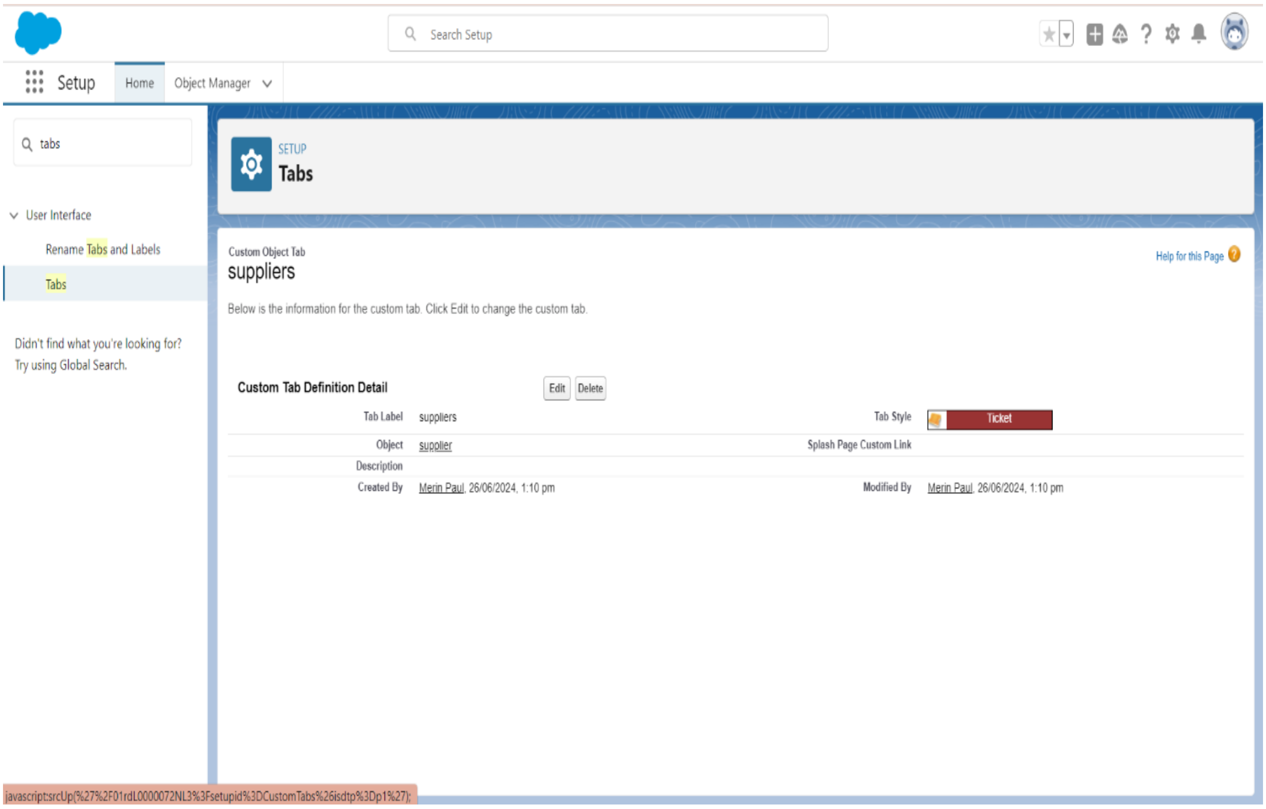

# Rice details tab



# Rice mill tab




# Supplier tab



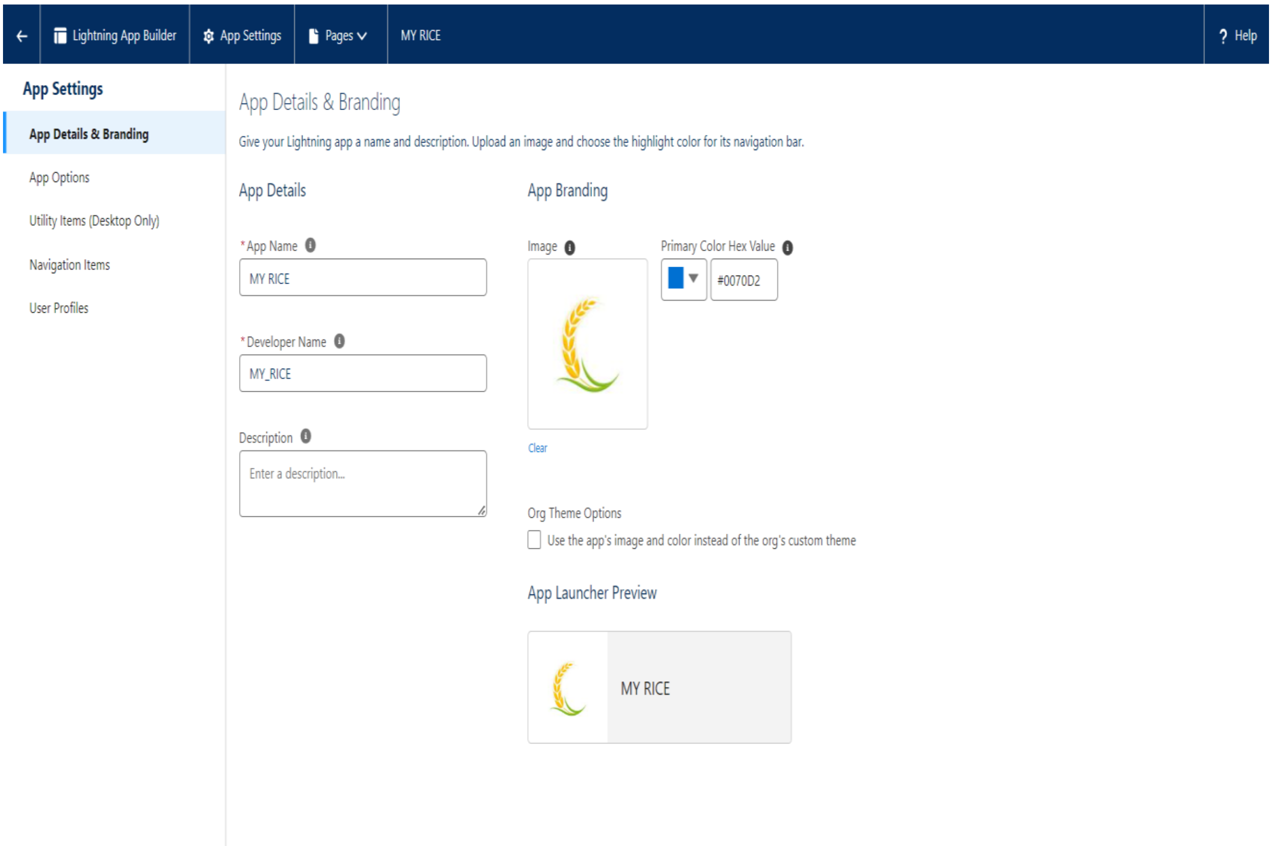
# THE LIGHTNING APP

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps lets to brand the apps with a custom colour and logo. Can even include a utility bar and Lightning page tabs in the Lightning app. Members of an org can work more efficiently by easily switching between apps.

The lightning app MY RICE with objects supplier, rice mill, consumer and Rice details is created, which Streamlines the Daily Rice Production and Sales Reporting, Enhancing Efficiency and Customer Experiences.

**Steps 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.
2. Fill the app name in app details as MY RICE →Next → (App option page) keep it as default → Next → (Utility Items) keep it as default → Next.
3. Upload a photo that is related to the app.
4. To Add Navigation Items:
   Select the items (supplier, rice mill, consumer, Rice details) from the search bar and move it using the arrow button → Next.
5. To Add User Profiles:
   Search profiles (System administrator) in the search bar → click on the arrow button → save & finish.



# FIELDS

Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that is required for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields

1. Standard Fields
2. Custom Fields

**Standard Fields:**

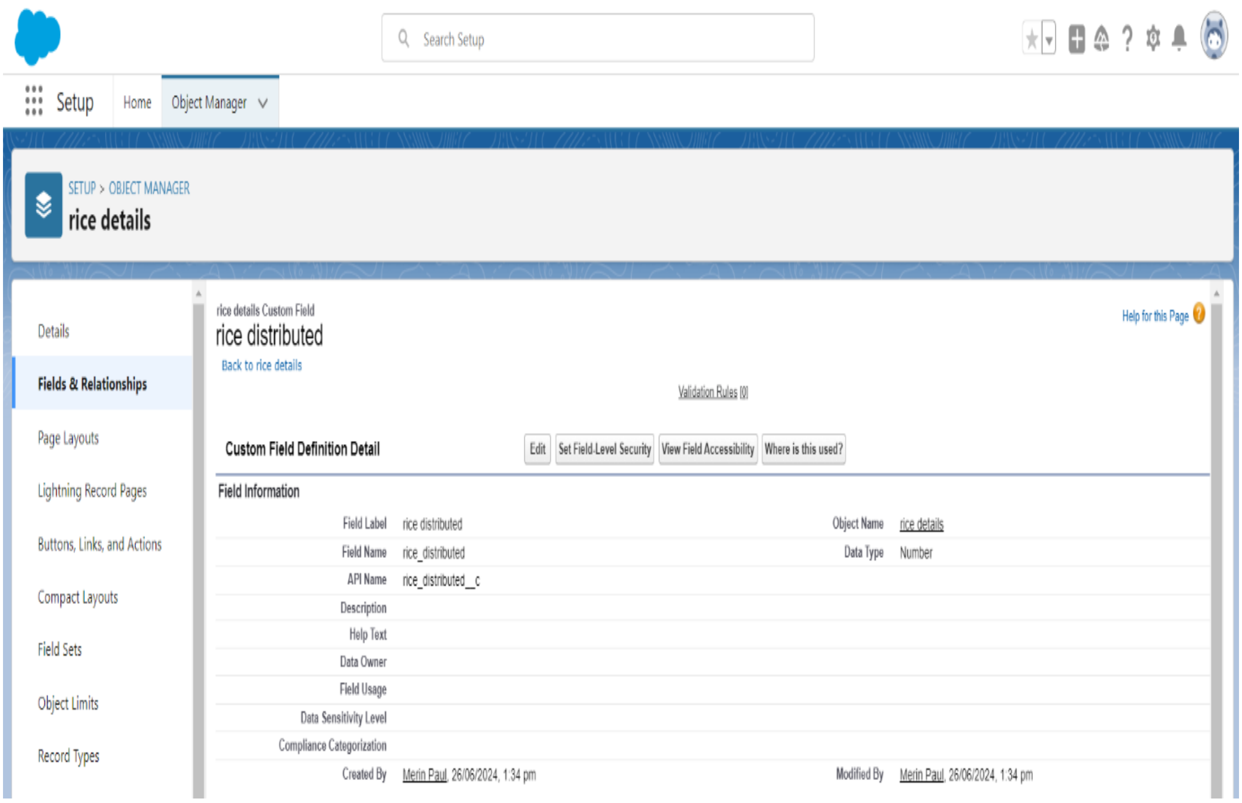
Standard Fields are the predefined fields in Salesforce that perform a standard task. These are fields that will be found commonly in every Salesforce application

**Custom Fields:**

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary.

**Creating the rice distributed field in rice details object**

1. Go to the setup page → click on object manager → From drop down click edit for rice details object.
2. Click on fields & relationship → click on New.
3. Select Data type as "Number" and click Next.
4. Given the Field Label as "rice distributed" and length as "5".
5. Field Name will be auto populated, and click on Next→ Next → Save.

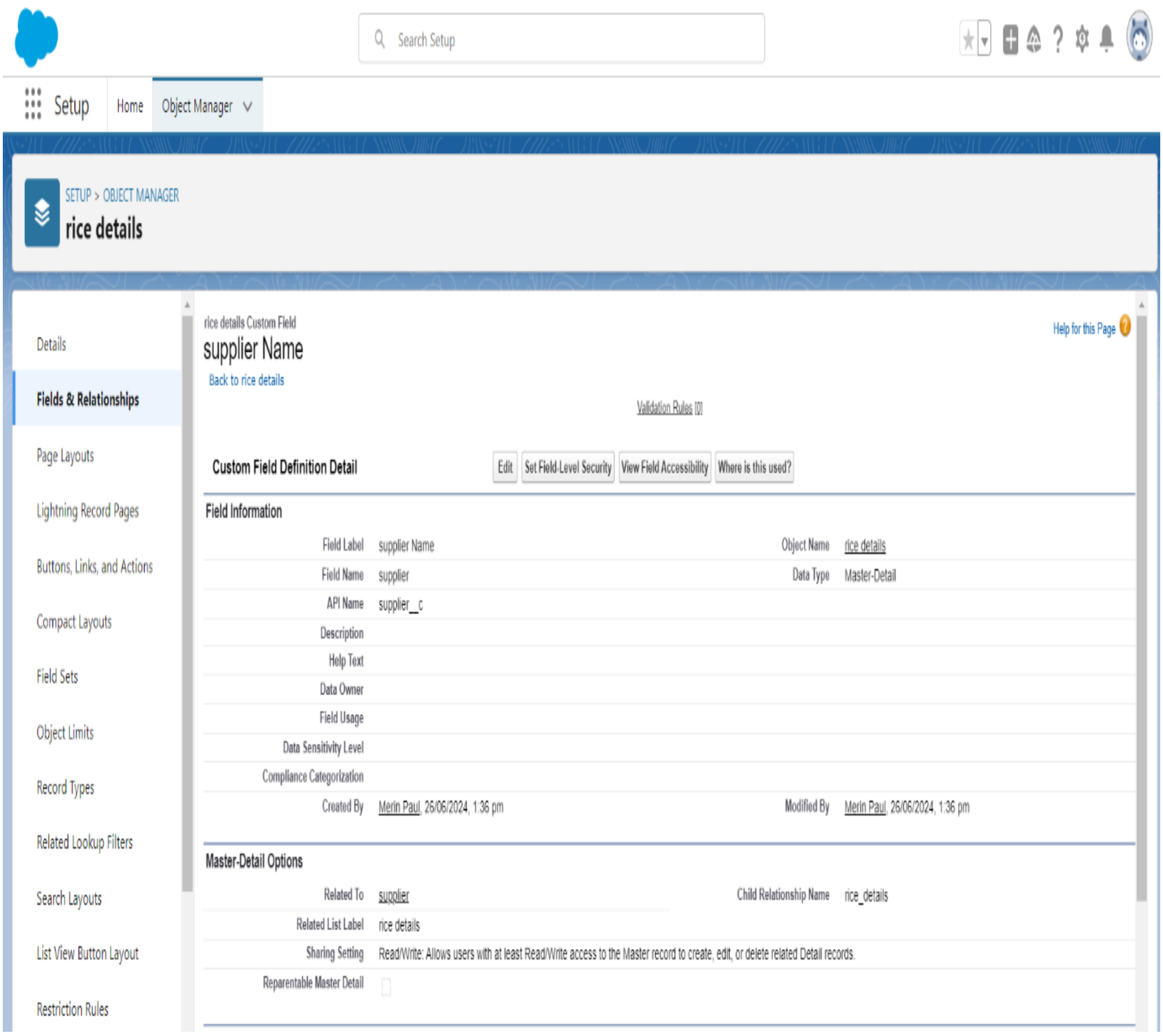


# Junction object

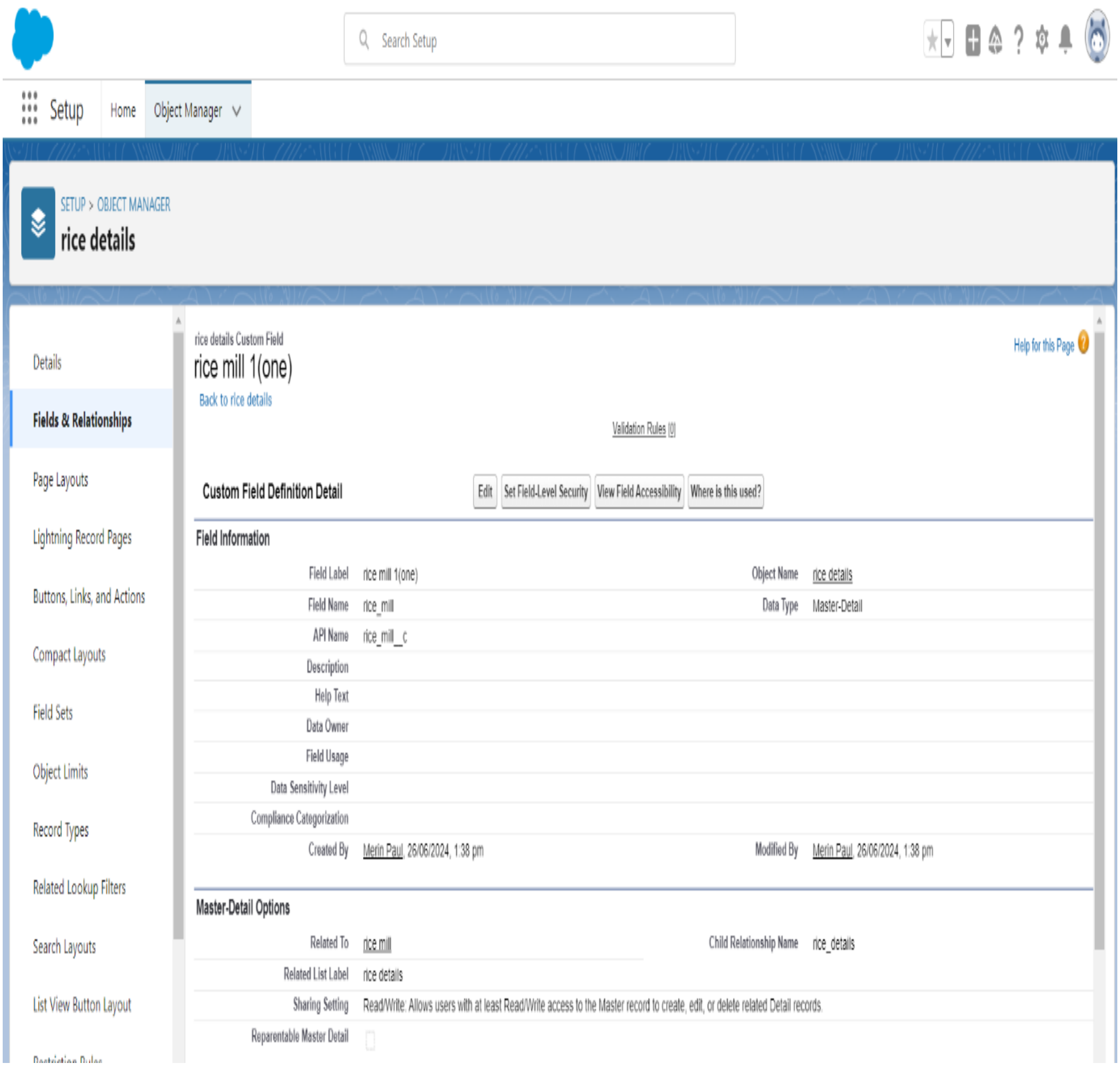
A Junction object is a custom object that serves as a bridge between two related objects in a many-to-many relationship. It allows you to create a relationship between records of two different objects by creating a many-to-many relationship model.

**Creating junction object as rice details with supplier and rice mill**

1. Go to the setup page → click on object manager → From drop down click edit for rice details object.
2. Click on fields & relationship → click on New.
3. Select "Master-Detail relationship" as data type and click Next.
4. Select the related object "supplier" and click next.
5. Give Field Label as "supplier Name" and click Next.
6. Next → Next → Save & New.




7. Follow the same steps from 1 to 3.
8. Select the related object "rice mill" and click Next.
9. Give Field Label as "rice mill 1(one)" and click Next.
10. Next → Next → Save.

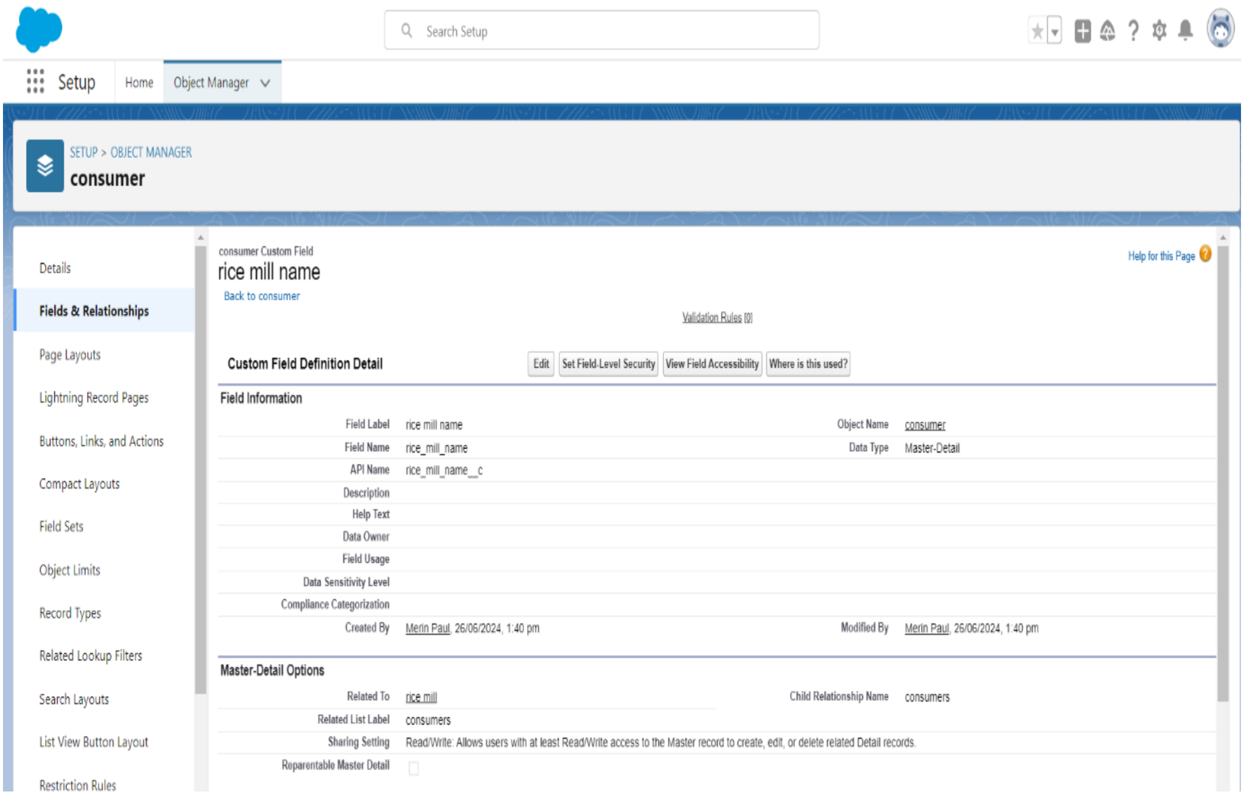



## Master-Detail relationship

Master-detail relationship is a type of relationship between two objects where the master object controls certain behaviours and settings of the detail object.

**Creating Master-Detail Relationship between consumer and rice mill Object**

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

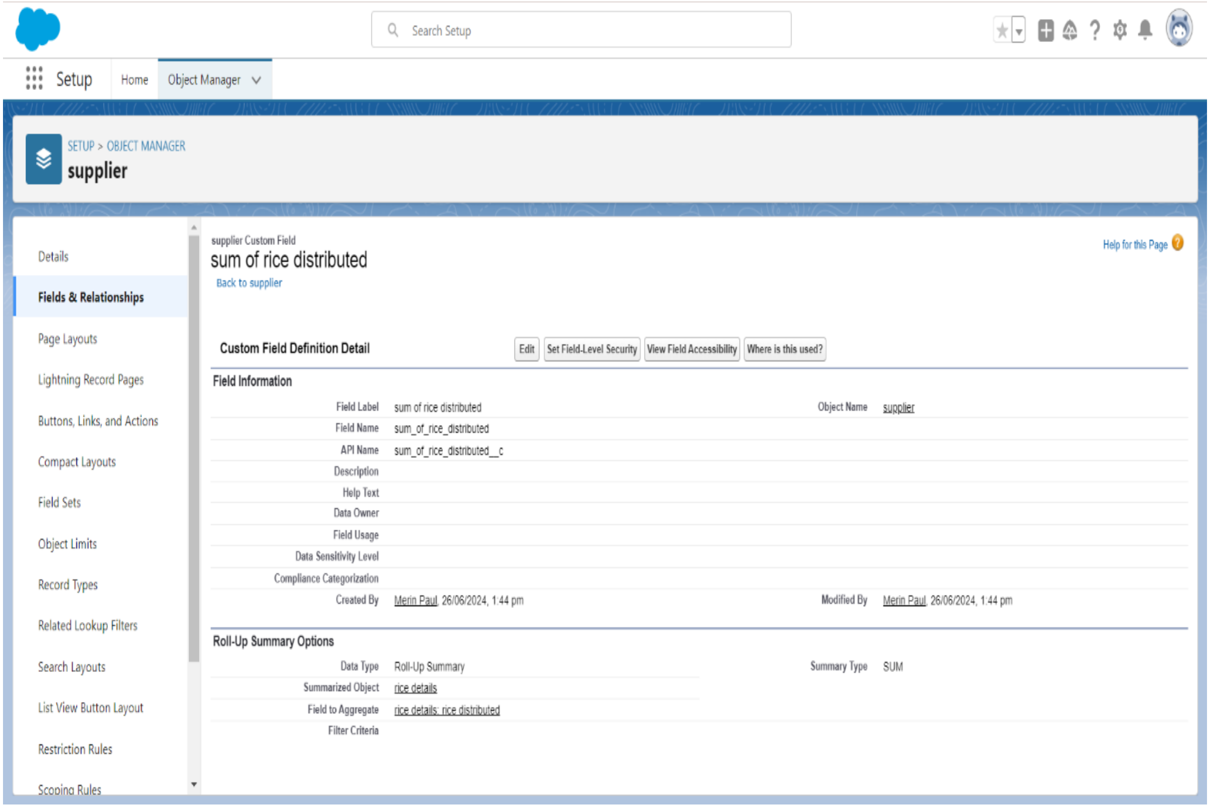



## Rollup summary field

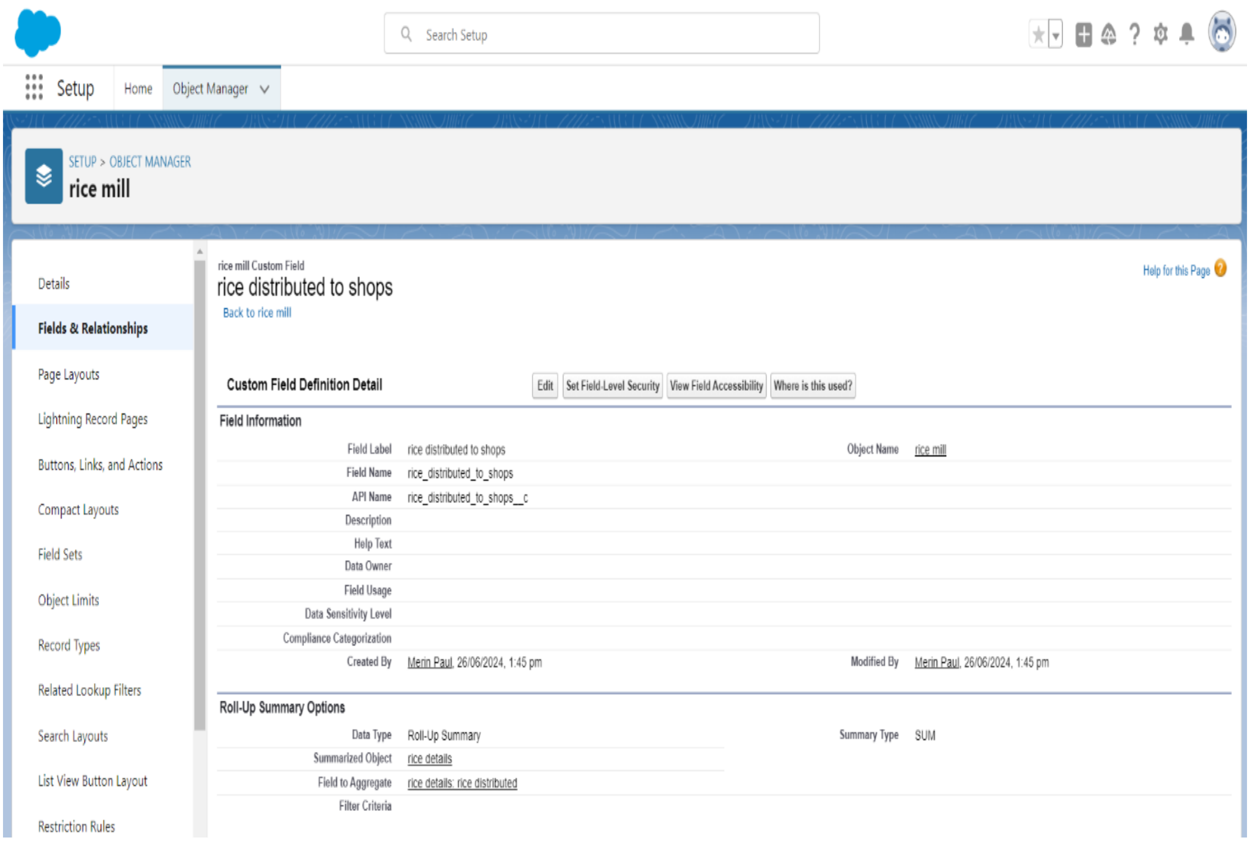
A rollup summary field is a field that summarizes data from a child object to a parent object that shares a master-detail relationship. Rollup summary fields can use the COUNT, SUM, MIN, and MAX functions.

**Creating the Roll-up summary field on supplier and rice mill Object**

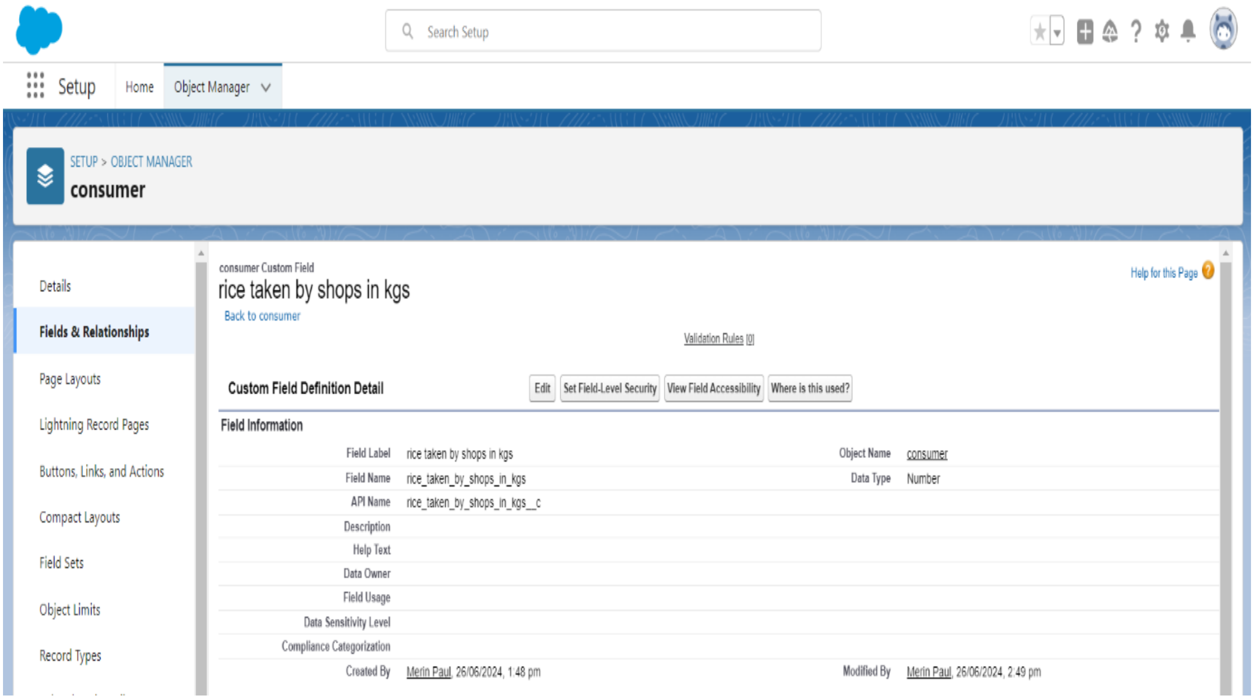
1. Go to setup → click on Object Manager → type object name(supplier) in search bar → click on the object.
2. Now click on “Fields & Relationships” → New
3. Select the data type as “Rollup summary”, and click Next.
4. Give the Field label as “sum of rice distributed”, Field Name will be Auto generated, and click Next.
5. Select the summarized object as “rice details”.
6. Select the Rollup type as “sum”.
7. Select the field to aggregate as “rice distributed”, and click Next → Next → Save.



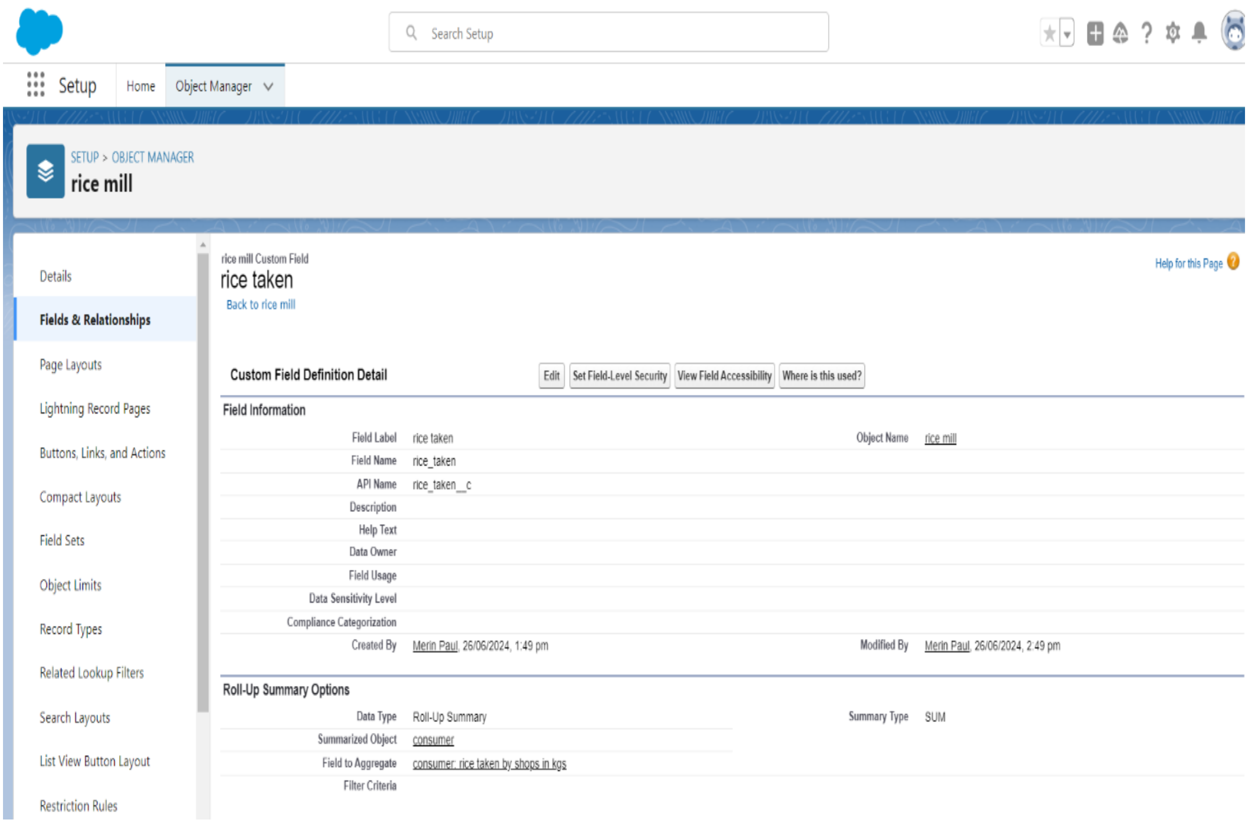

8. Follow the same steps for the rice mill Object from 1 to 3
9. Give the Field label as “rice distributed to shops”, Field Name will be Auto generated, and click Next.
10. Select the summarized object as “rice details”.
11. Select the Rollup type as “sum”.
12. Select the field to aggregate as “rice distributed”, and click Next → Next → Save.



13. create the field as “rice taken by shops in kgs” using number datatype in consumer object

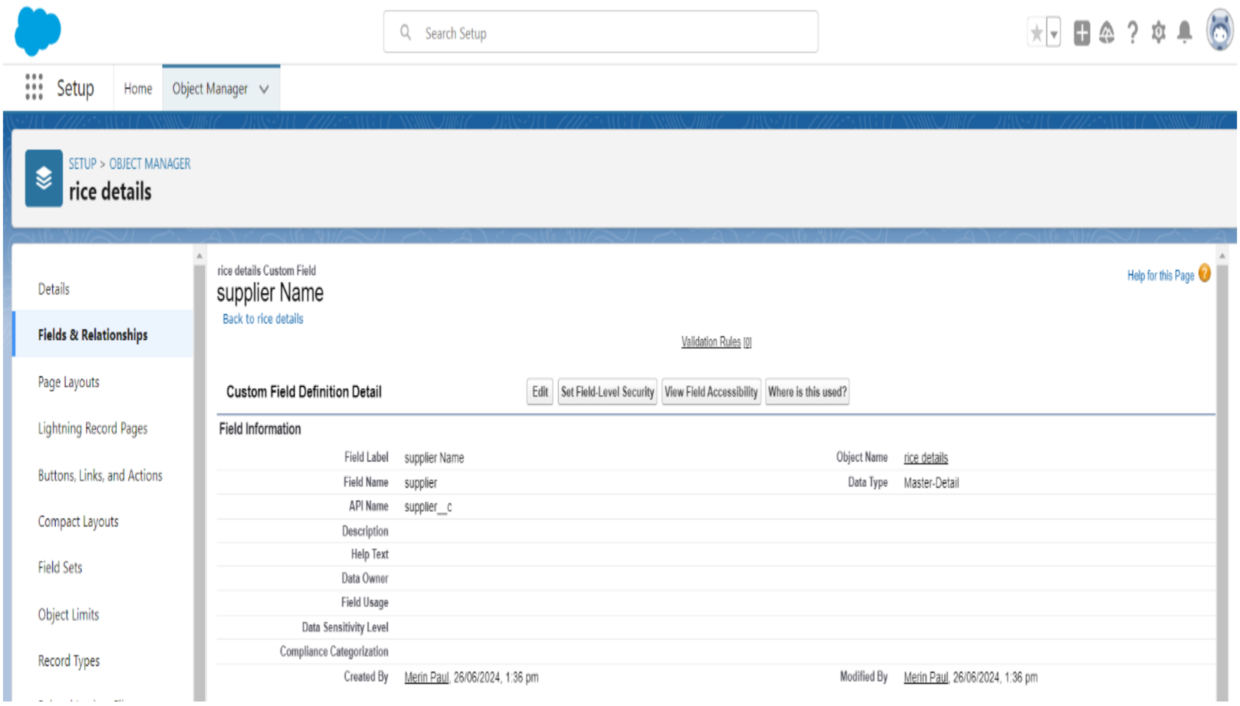



14. Follow the same steps for the rice mill Object from 1 to 3
15. Give the Field label as “rice taken”, Field Name will be Auto generated, and click Next.
16. Select the summarized object as “consumer”.
17. Select the Rollup type as “sum”.
18. Select the field to aggregate as “rice taken in shops”, and click Next → Next → Save.



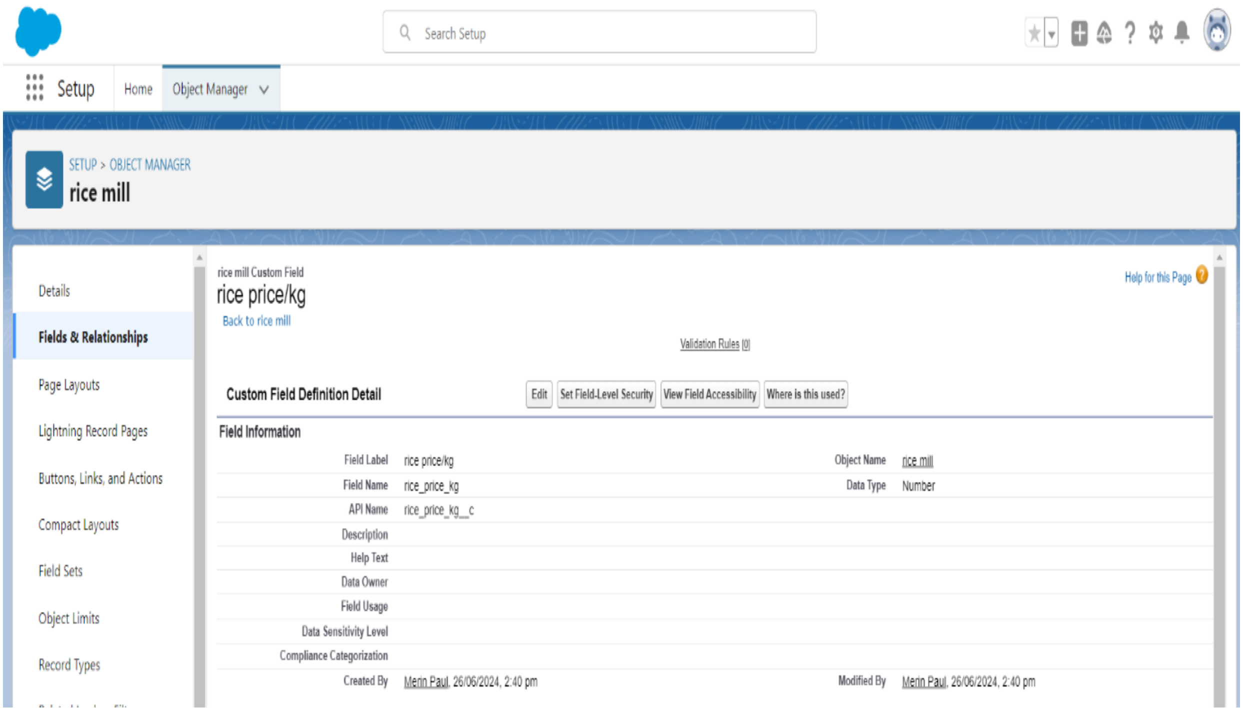
**Creating the supplier name field in rice details object**

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 “supplier name” and length as “5”.
5. Field Name will be auto populated, and click on Next→ Next → Save.



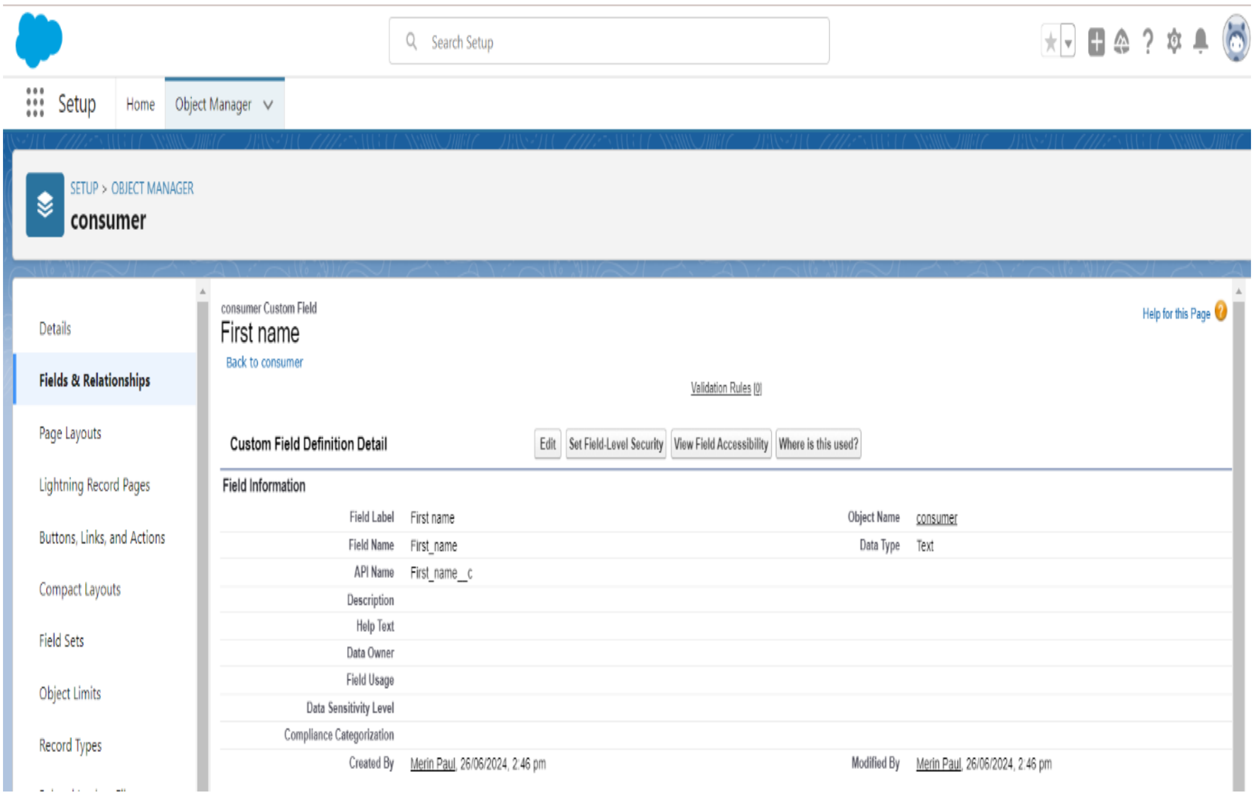

**Creating rice price/kg field in rice mill Object**

1. Select Data type as “Number” and click Next.
2. Given the Field Label as “rice price/kg” and length as “5”.

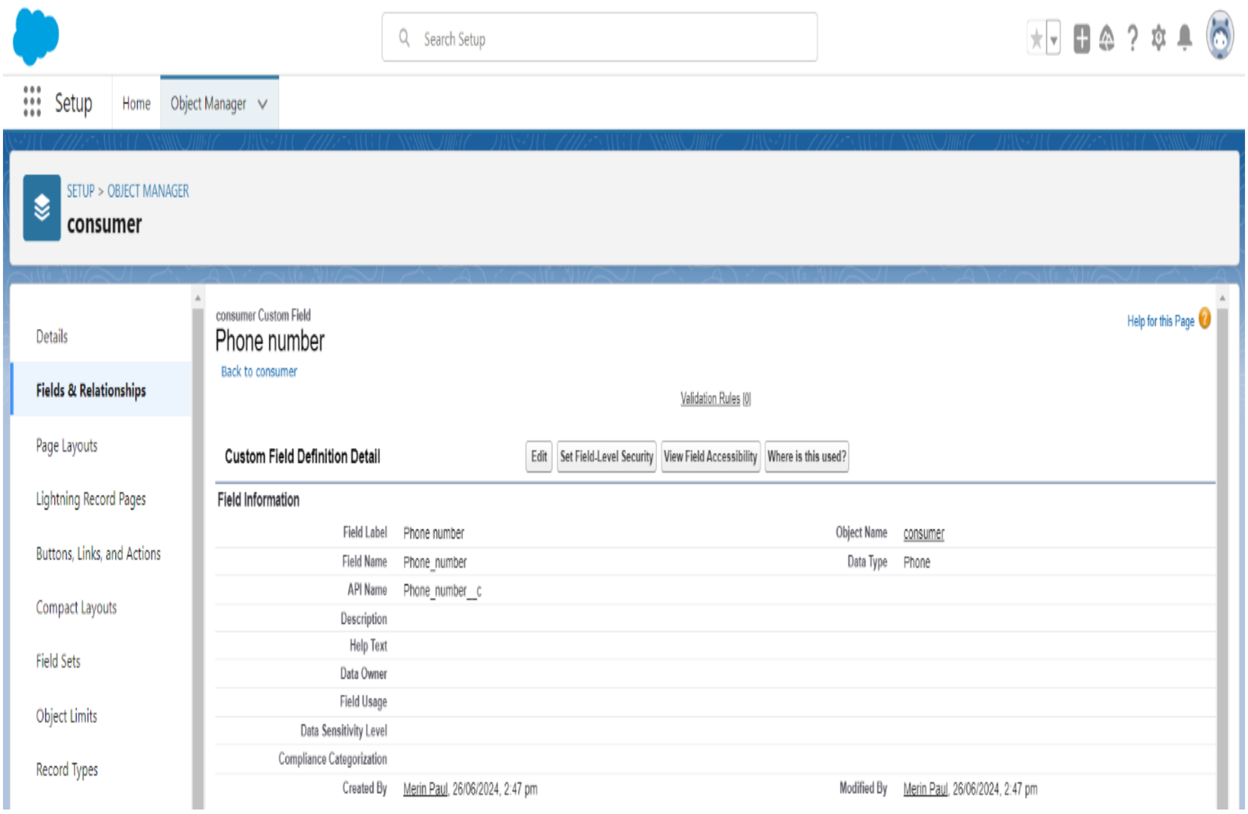


**Creating fields in consumer object**

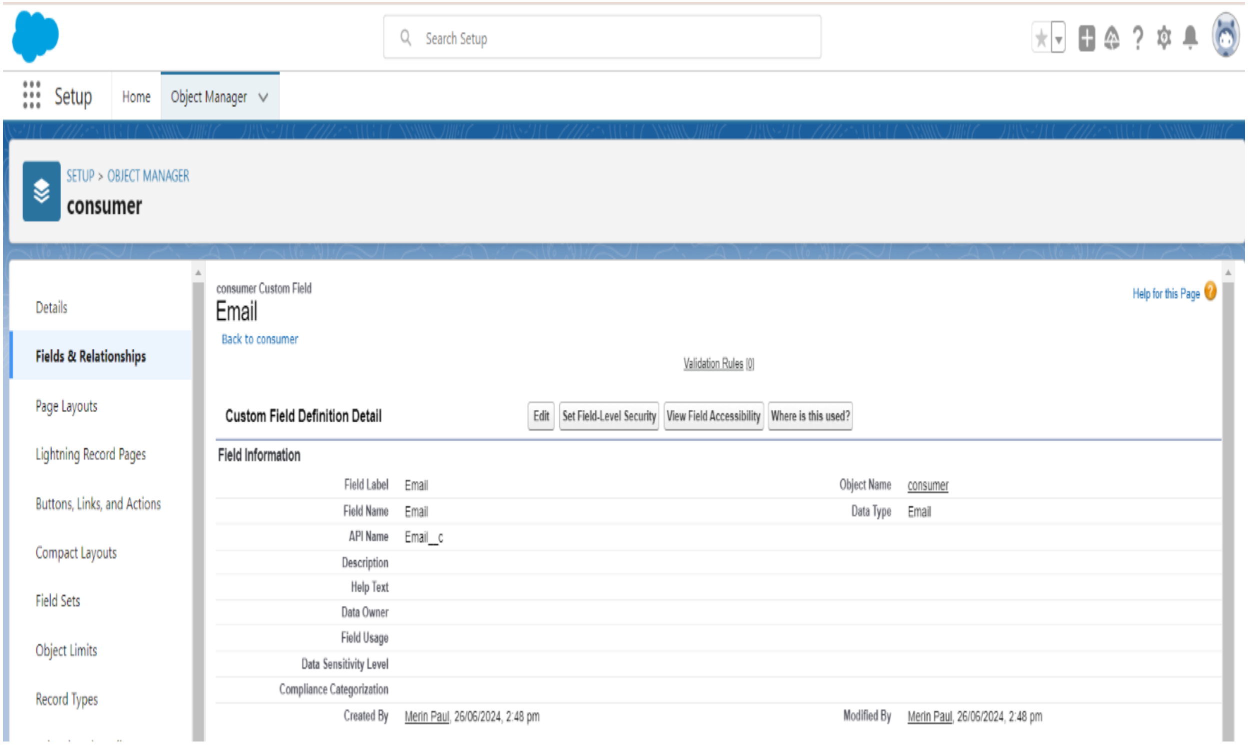
1. First name and Last name fields with text data type.



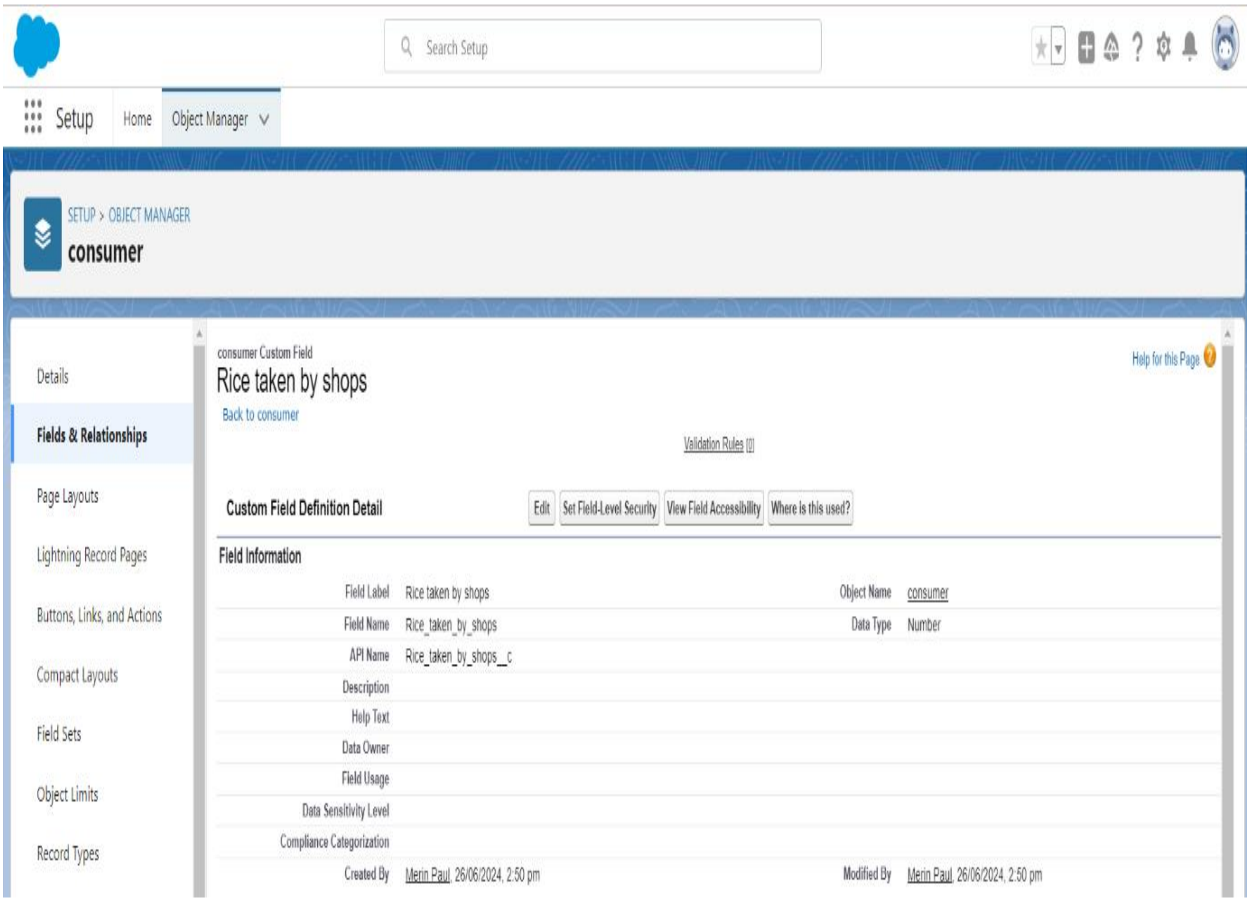

2. Phone number field with phone data type.



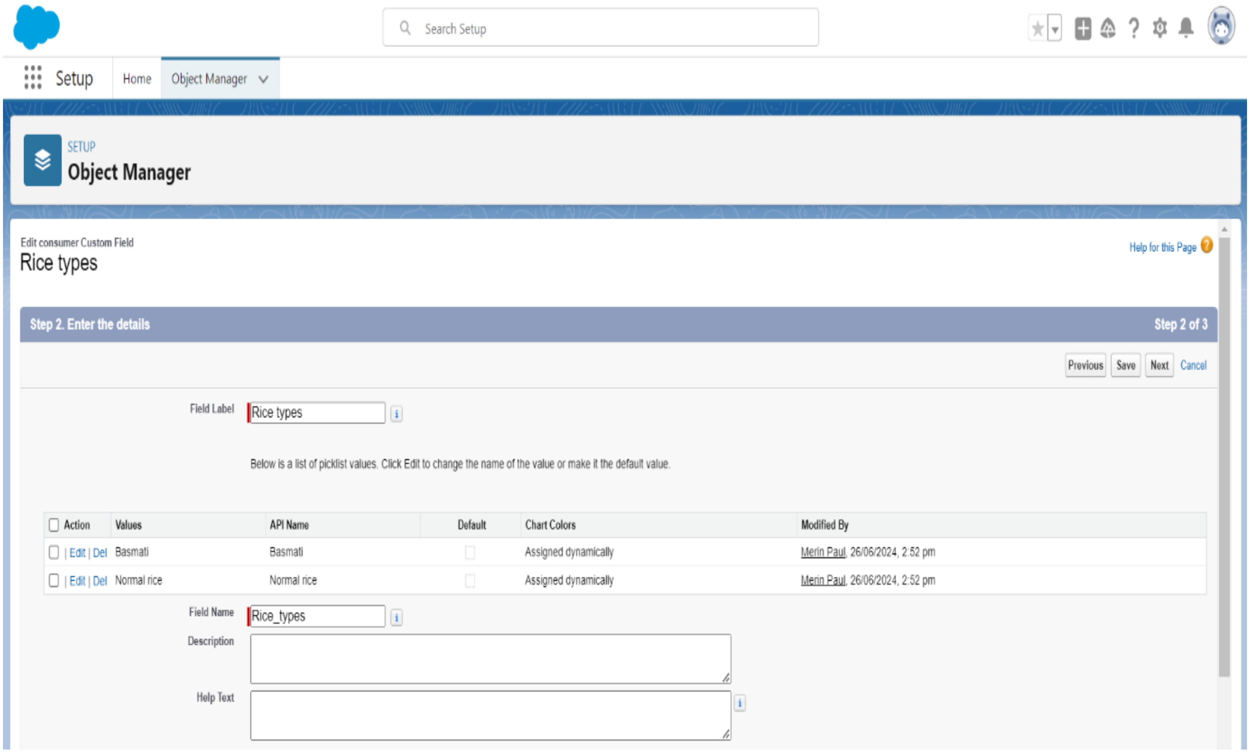
3. Email field with email data type.



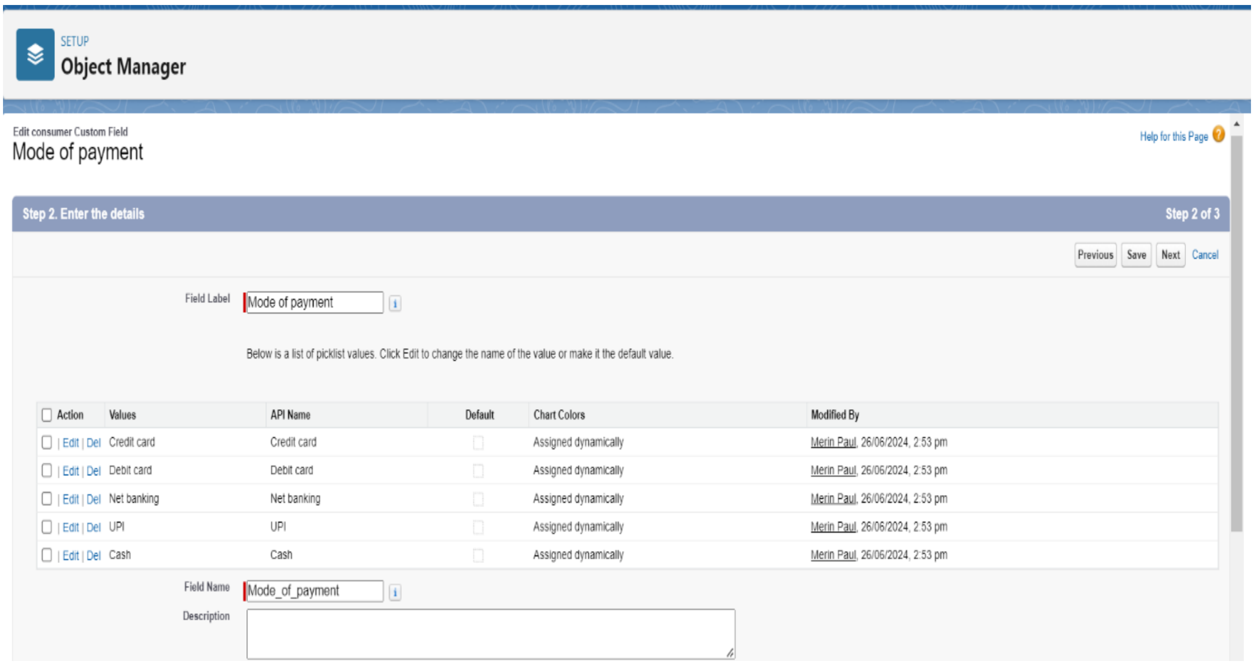

4. Rice taken by shops field with number data type.



5. Rice type field with picklist data type.
   Picklist values: -
   - Basmati
   - normal rice

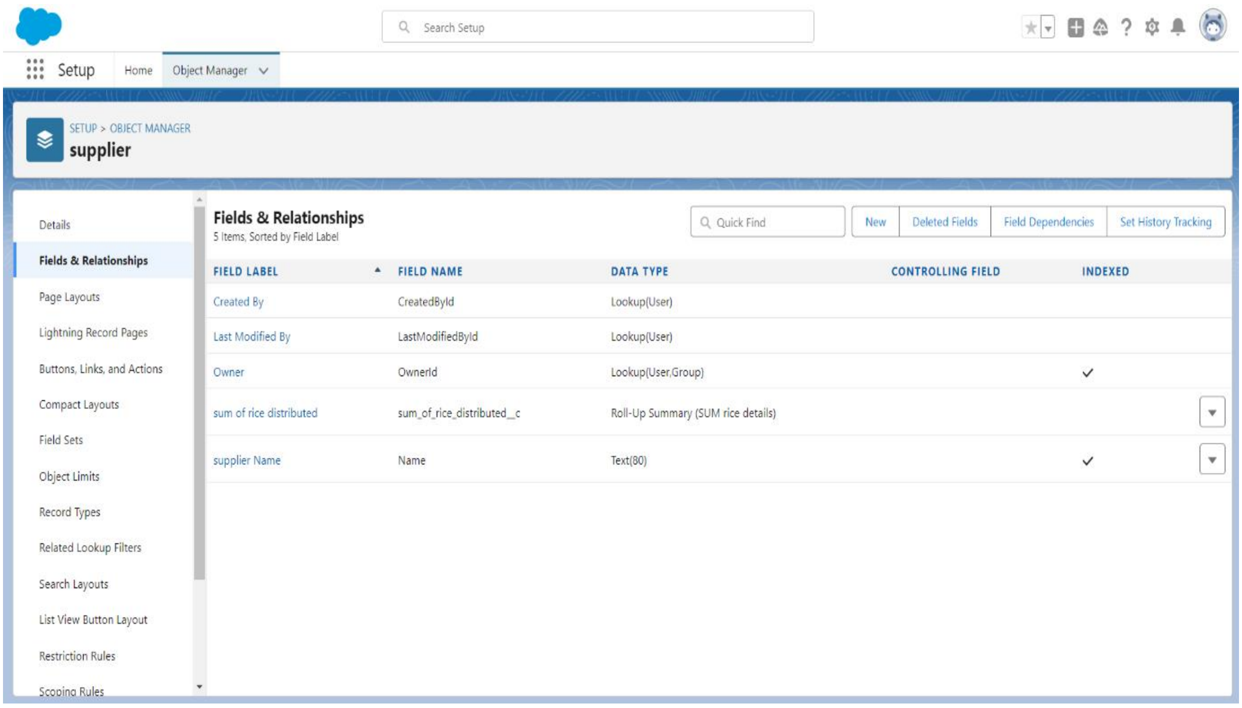



6. Mode of payment field with picklist data type.
   Picklist values: -
   - Credit card
   - Debit card
   - Net banking
   - UPI
   - Cash



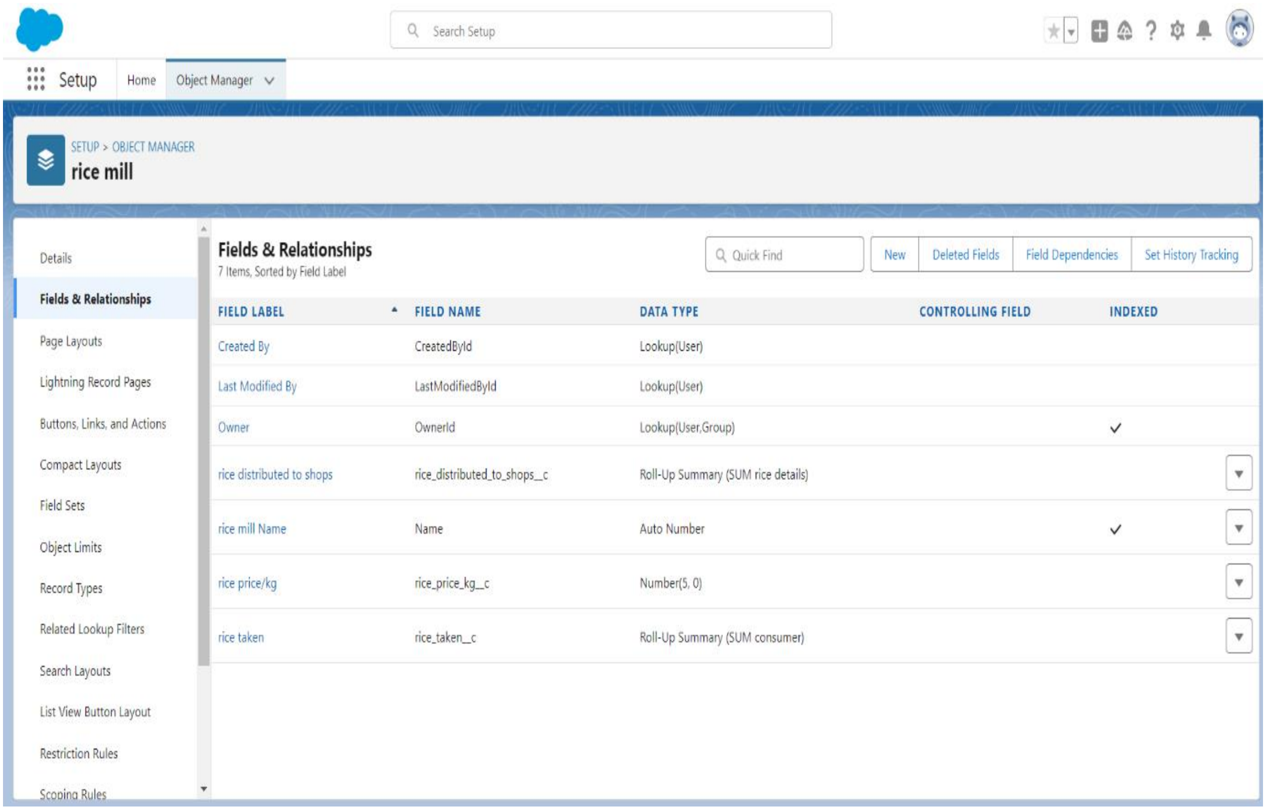
# Supplier Fields and Relationships

The fields and relationships involved in the object supplier is shown.



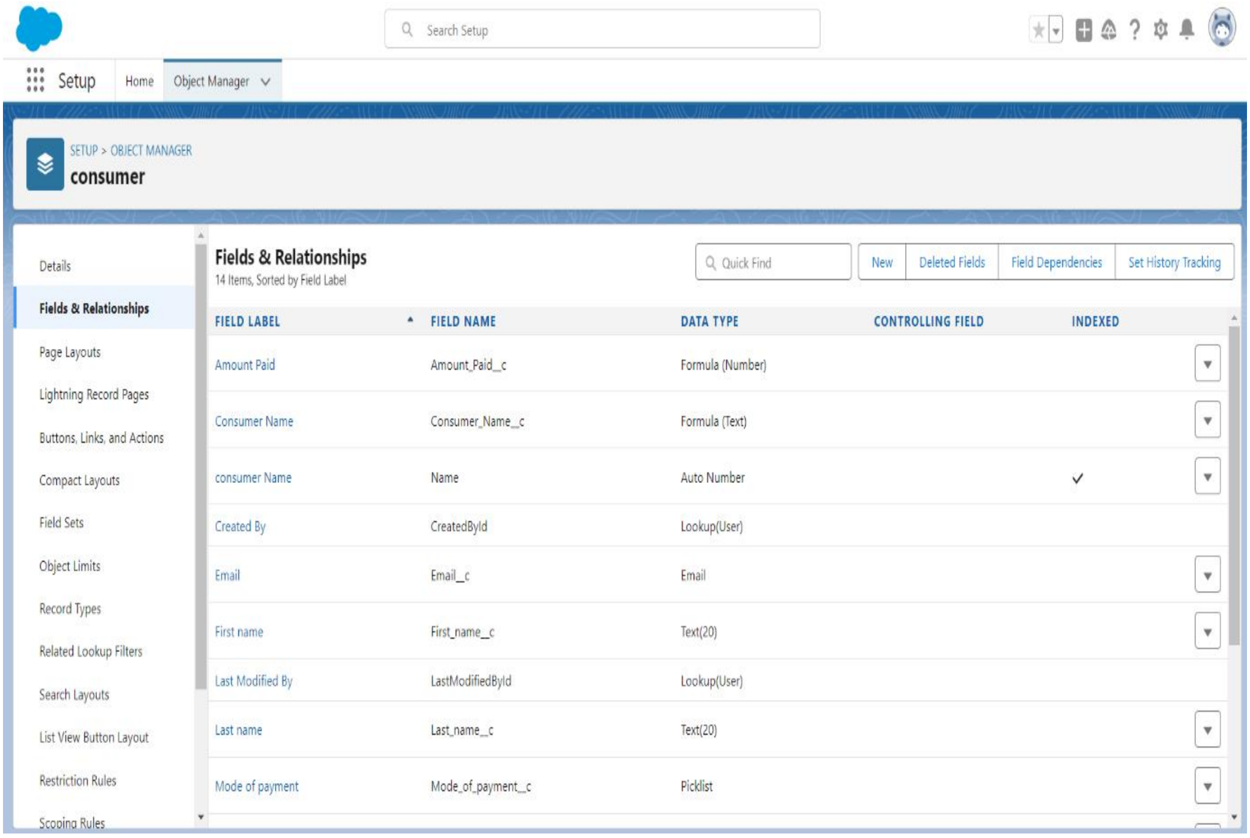

# Rice Mill Fields and Relationships

The fields and relationships involved in the object rice mill is shown.



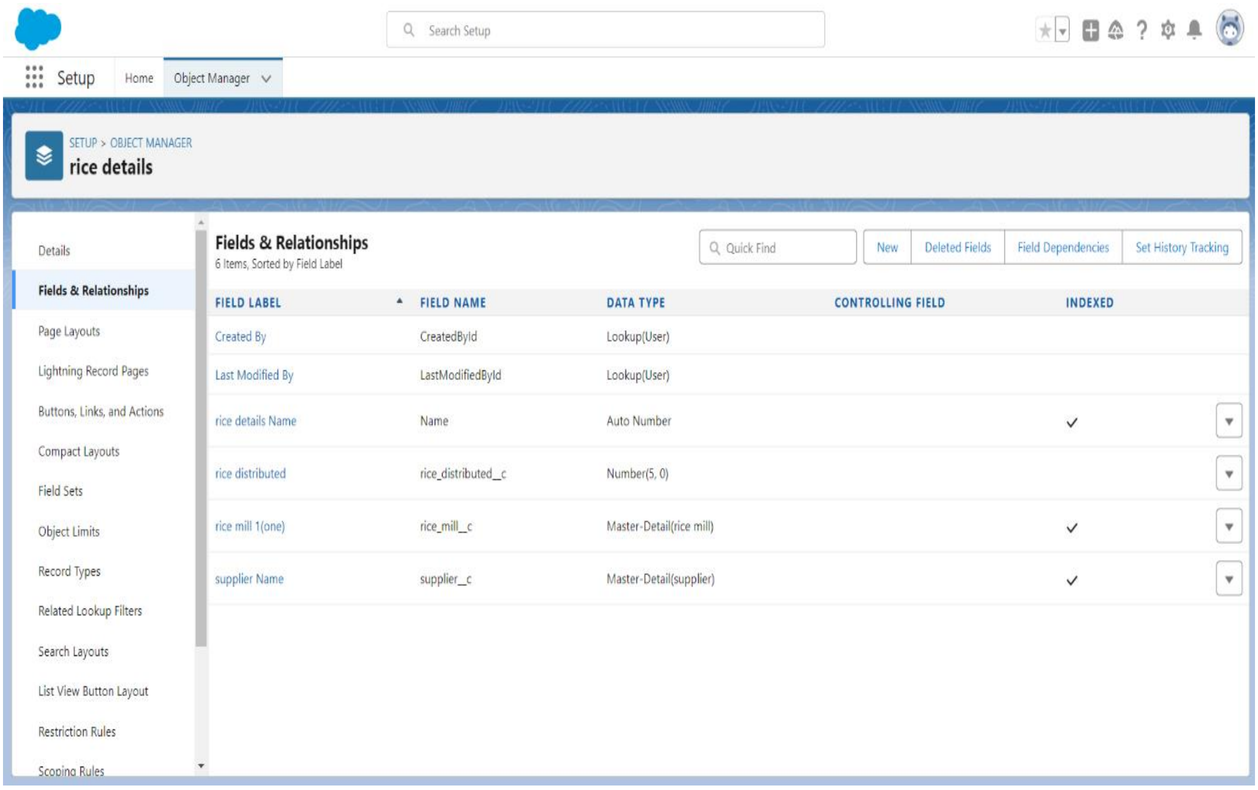
# Consumer Fields and Relationships

The fields and relationships involved in the object consumer is shown.



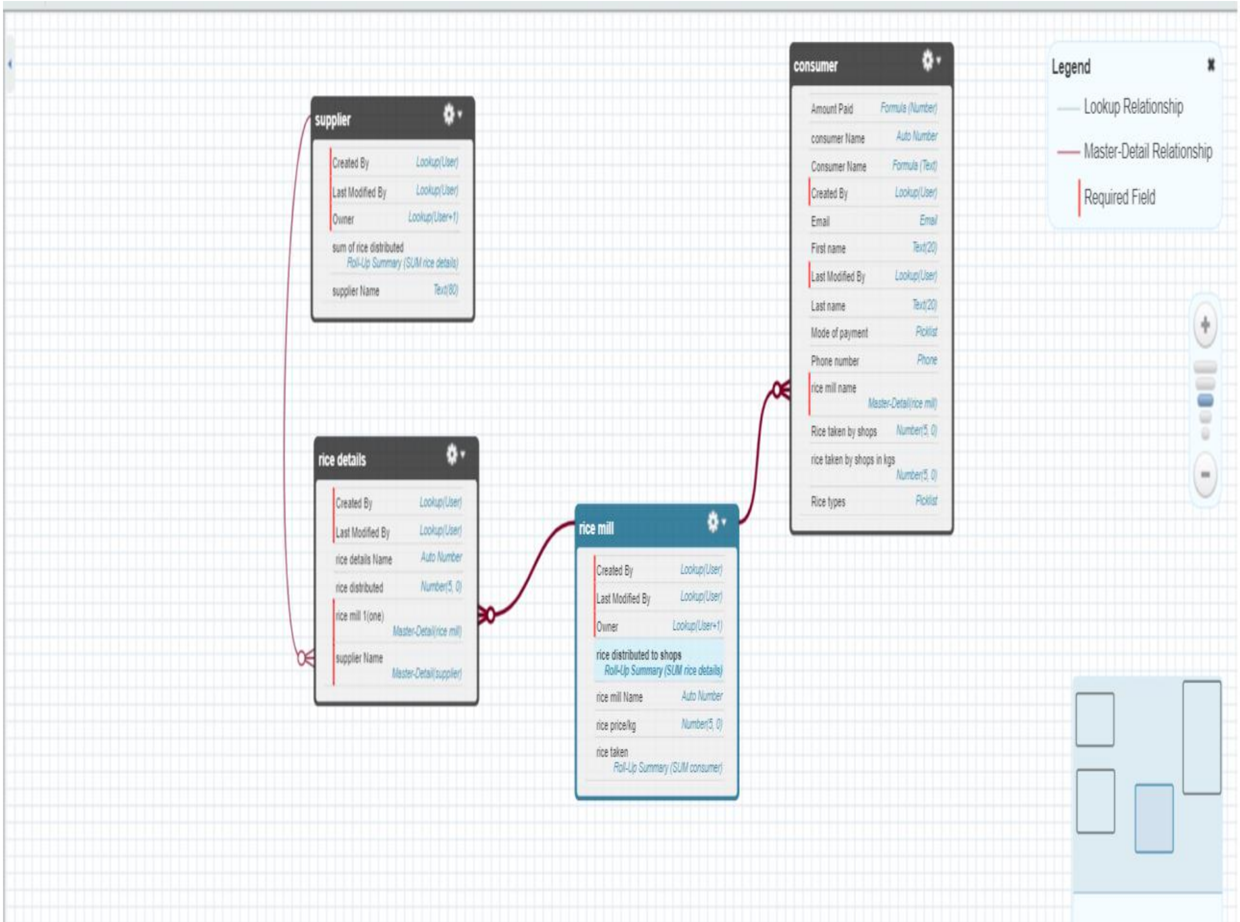

# Rice Details Fields and Relationships

The fields and relationships involved in the object rice details is shown.



## Schema Builder MY RICE

The fields in each object and the relationship between these objects in the MY RICE application is depicted using schema builder



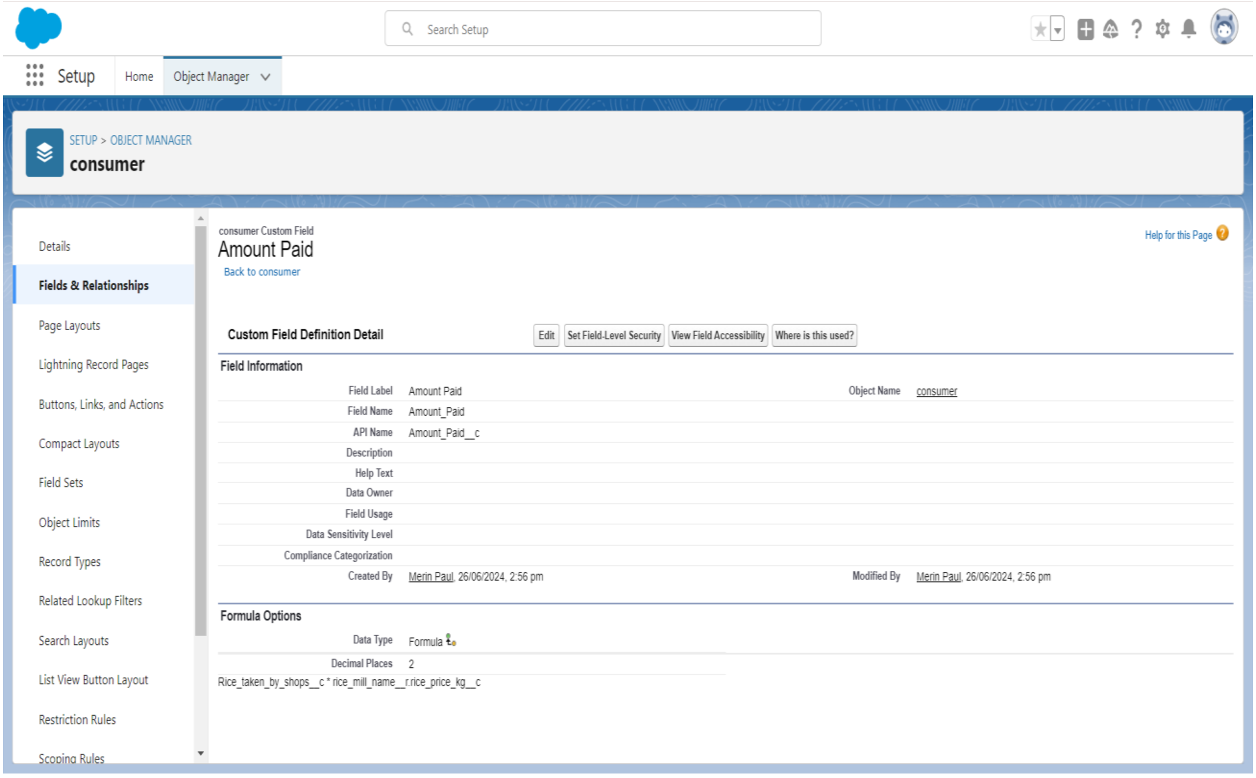

## Cross Object Formula Field in Consumer Object

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.

Two cross object formula fields are created in consumer object Amount paid and Consumer name.

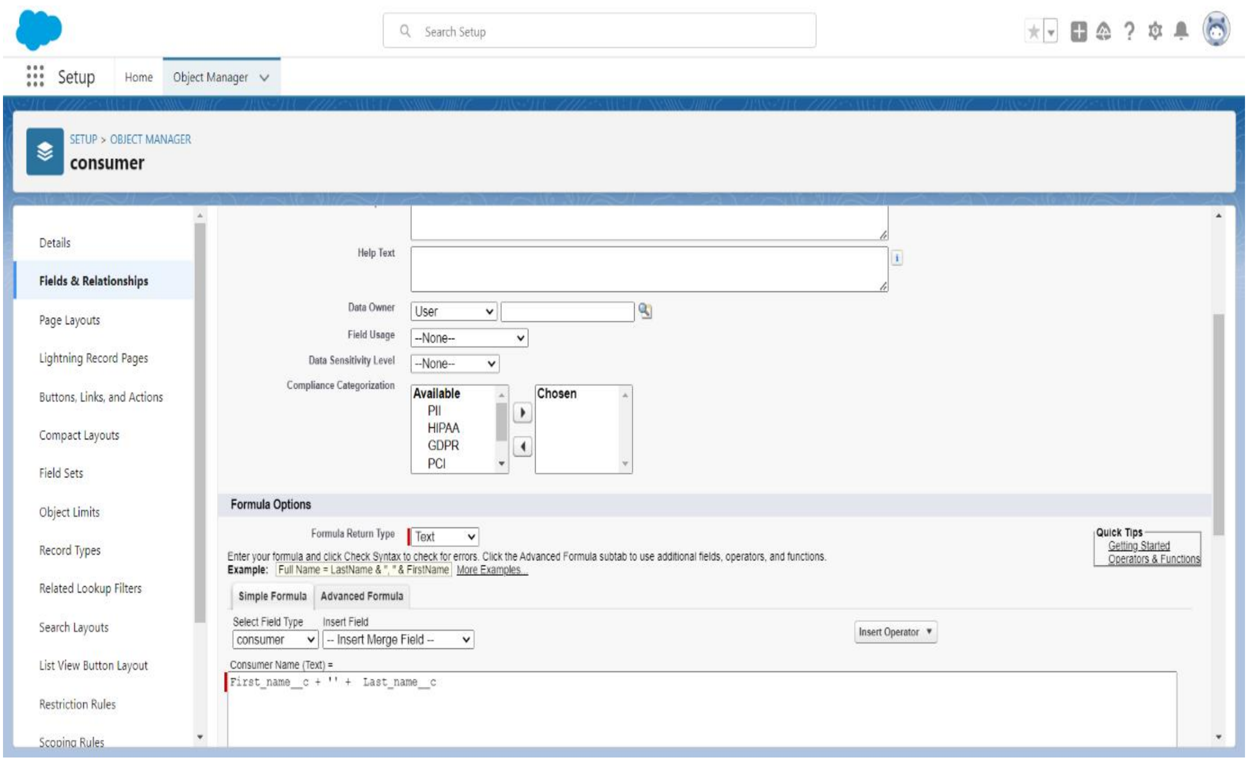
**Creating Cross Object Formula Field in consumer Object**

1. Go to setup → click on Object Manager → type object name(consumer) in search bar → click on the object.
2. Click on fields & relationship → click on New.
3. Select Data type as “Formula” and click Next.
4. Give Field Label and Field Name as “Amount Paid” and select formula return type as “Number” and click next.
5. Insert fields formula should be:
   rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c
6. Under Advanced Formula write down the formula and click “Check Syntax” and Save.




**Creating the Formula field in consumer Object**

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

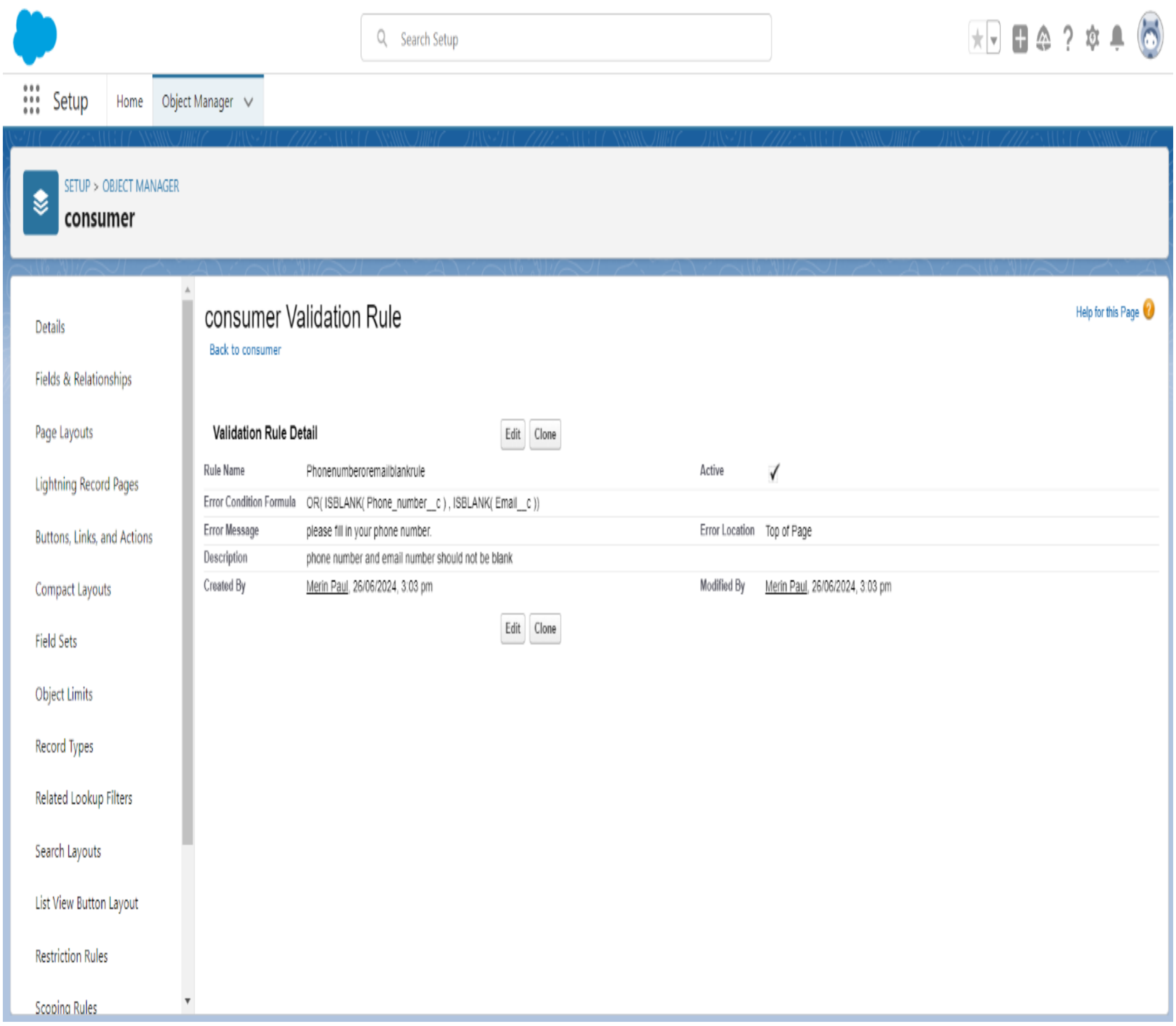


## Creating The Validation Rule

Improve the quality of the data using validation rules. Validation rules verify that the data a user enters in a record meets the standards that specified 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 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.

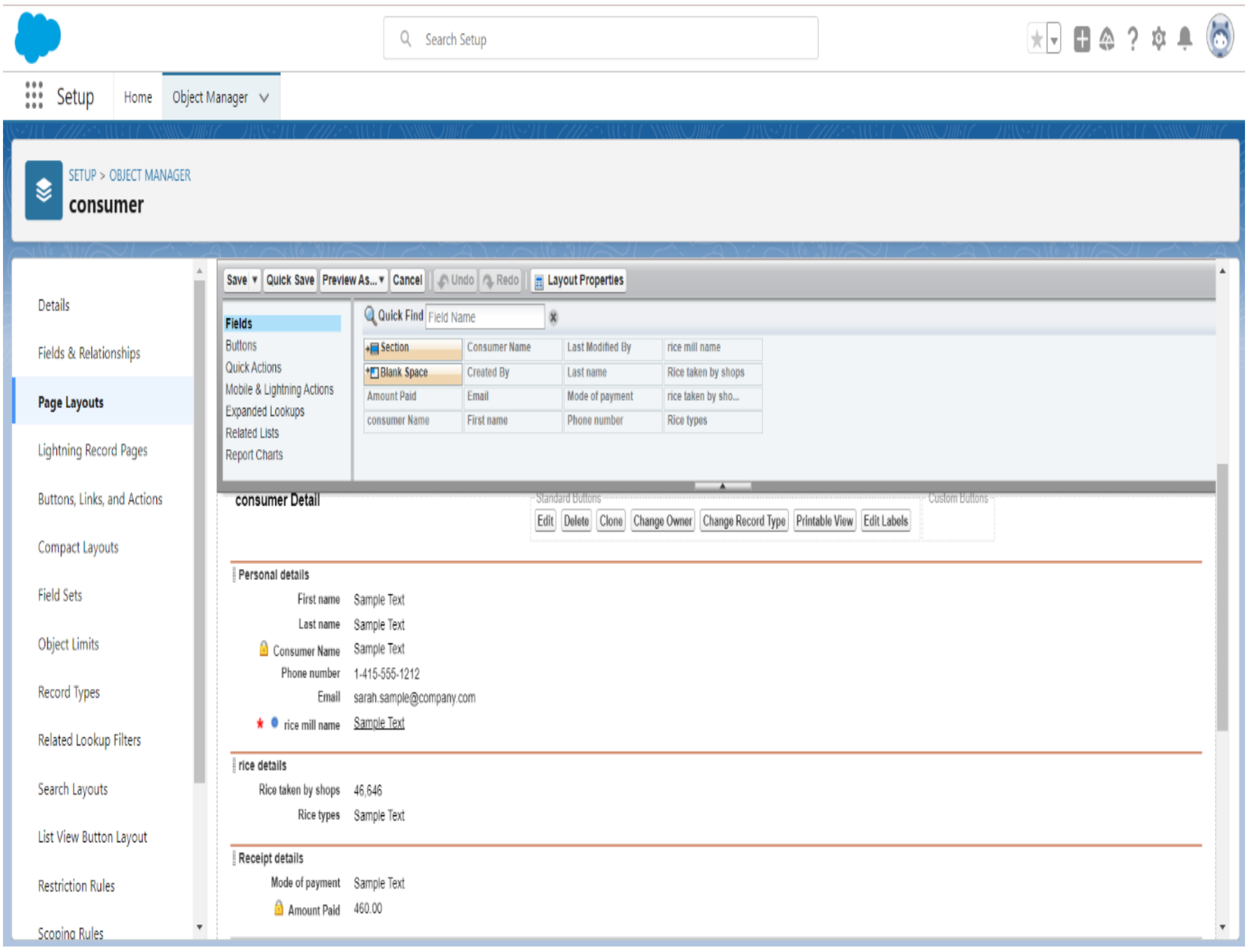


# PAGE LAYOUTS

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.

**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.
6. Now drag the fields to this section that mentioned, they are
    - First name, last name, consumer name, phone number, email, rice mill name.
7. Follow the same process for another two sections as shown above, they are
8. One section is "rice details", drag the fields that are
    - Rice taken by shop, rice type.
9. Another section is "Receipt details", and drag the fields that are
    - Mode of payment, Amount paid.
10. Then, Click save.



# PROFILES

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

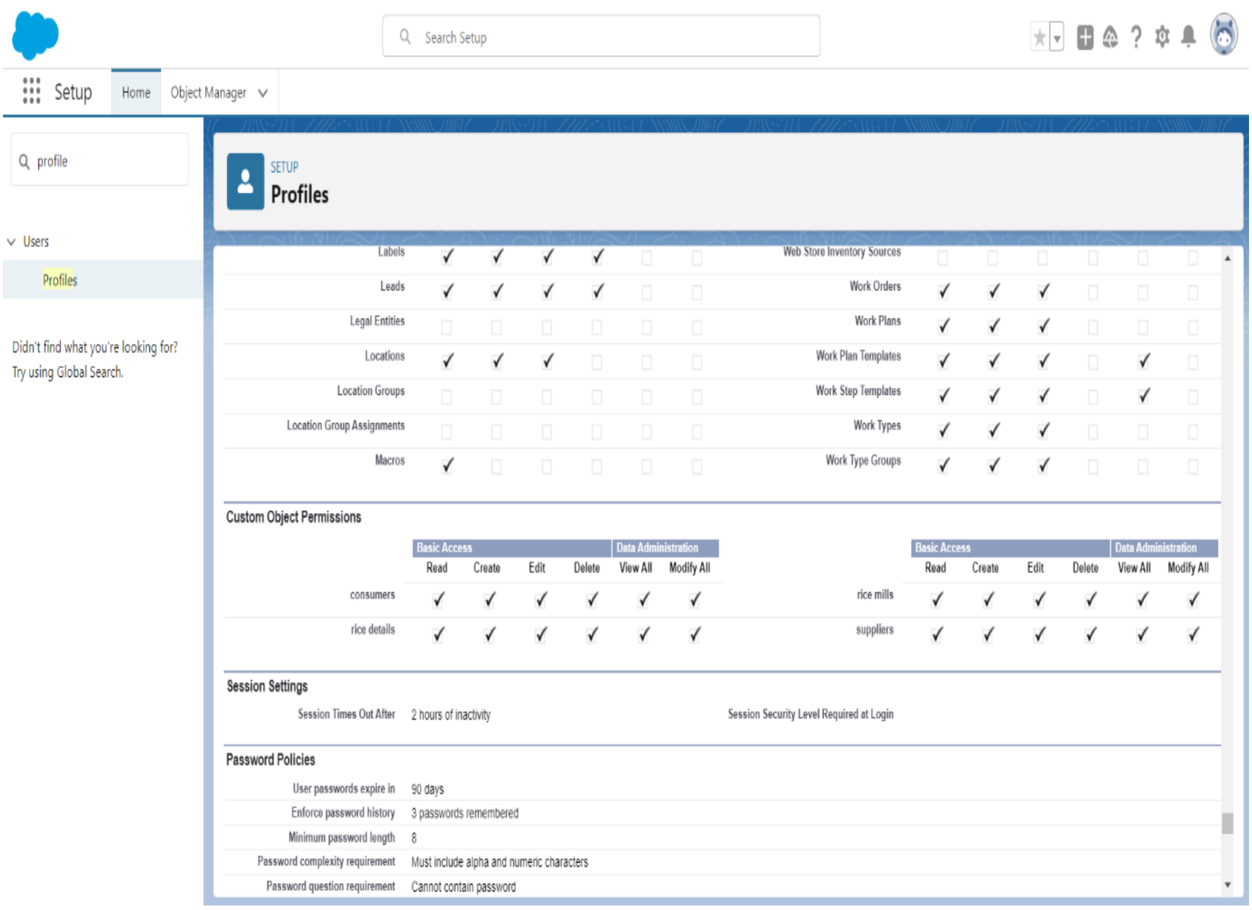
Three profiles are created Owner, Employer and Worker

## Owner Profile

Owner profile permissions and access for the objects are given.

**To create a new owner profile:**

1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (Standard User) → enter profile name (owner) → Save.
2. Scroll down to Custom Object Permissions and Give access permissions for consumers, rice details, rice mill and suppliers objects.
3. Give access and save it.

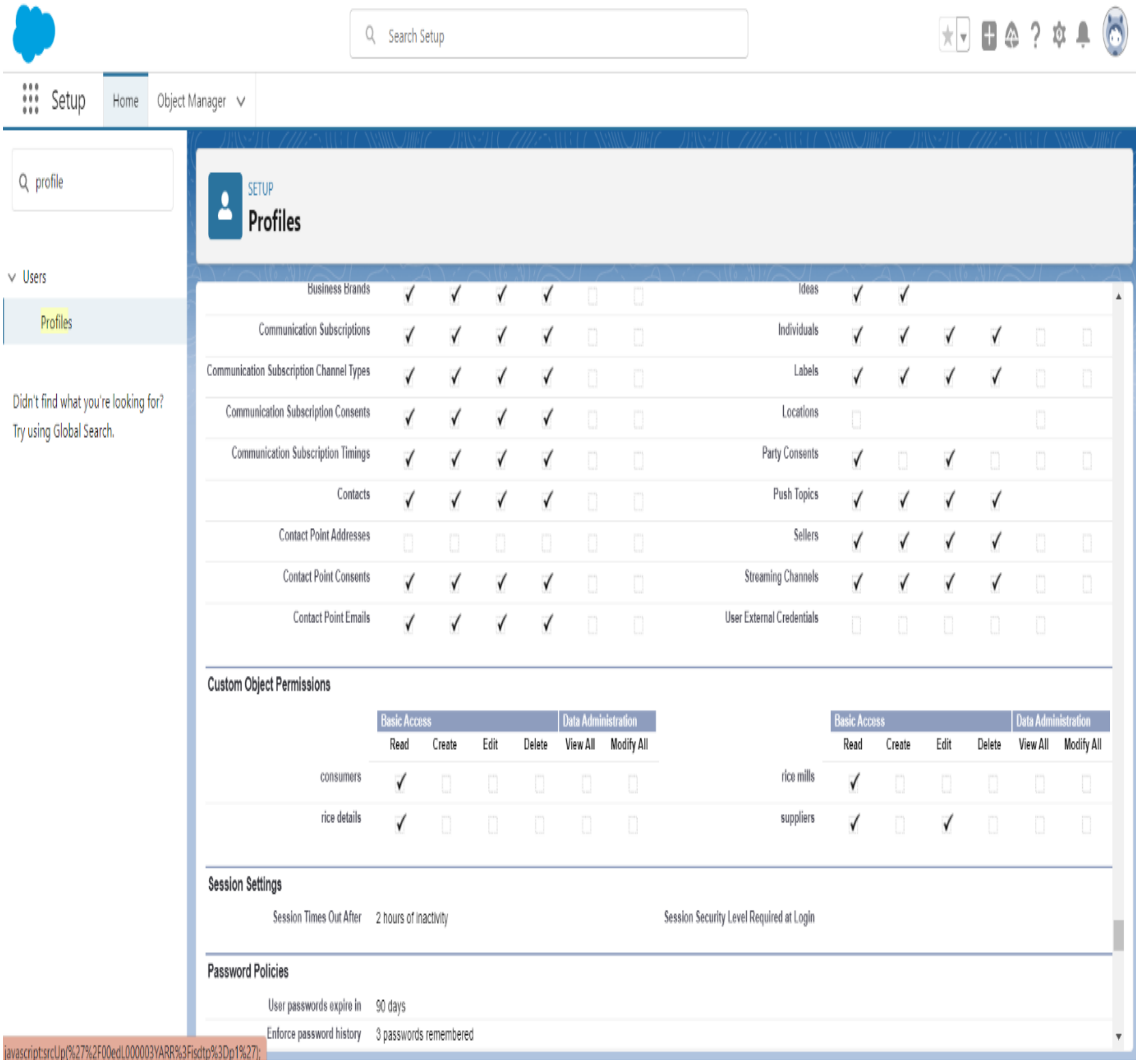


# Employer Profile

Employer profile permissions and access for the objects are given.

**To create a new employer profile:**

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

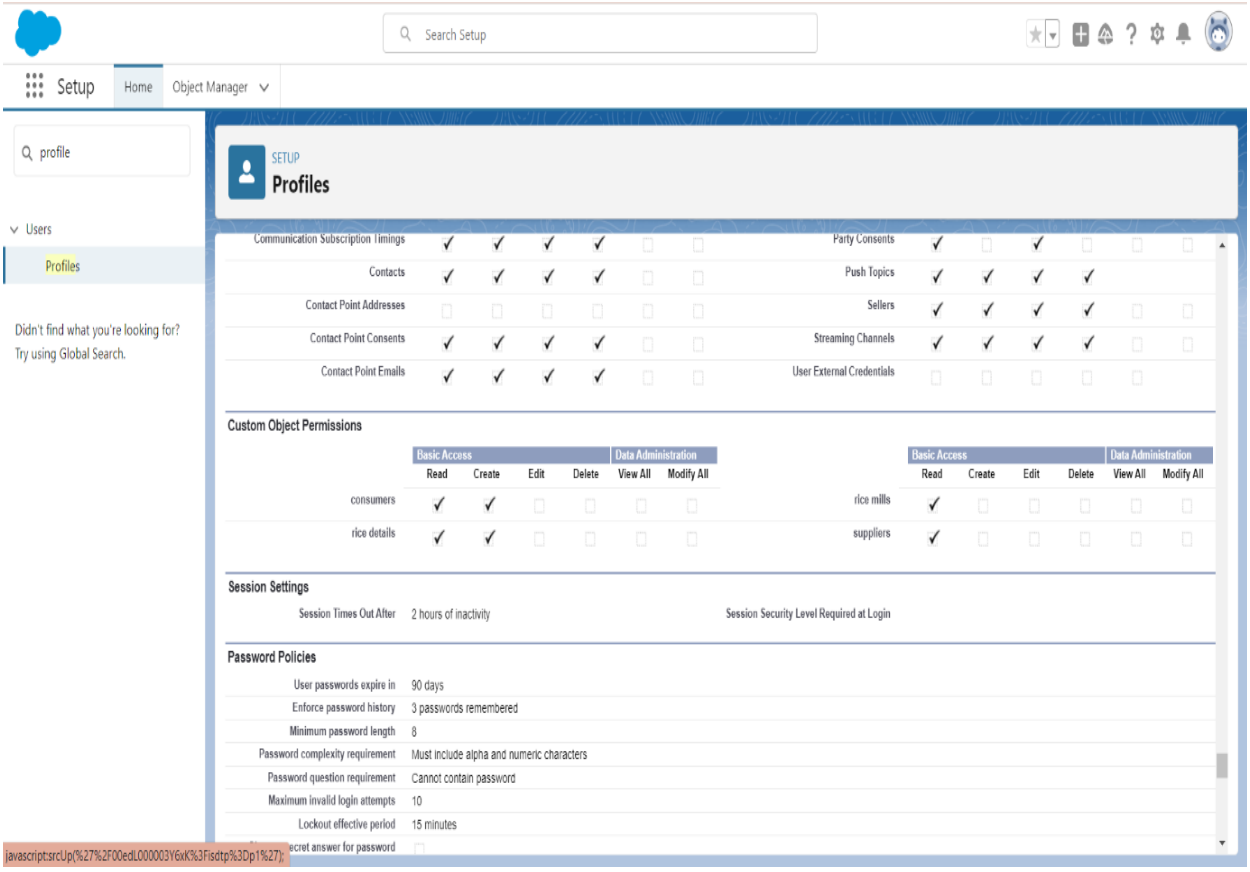


# Worker Profile

Worker profile permissions and access for the objects are given.

**To create a new worker profile:**

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

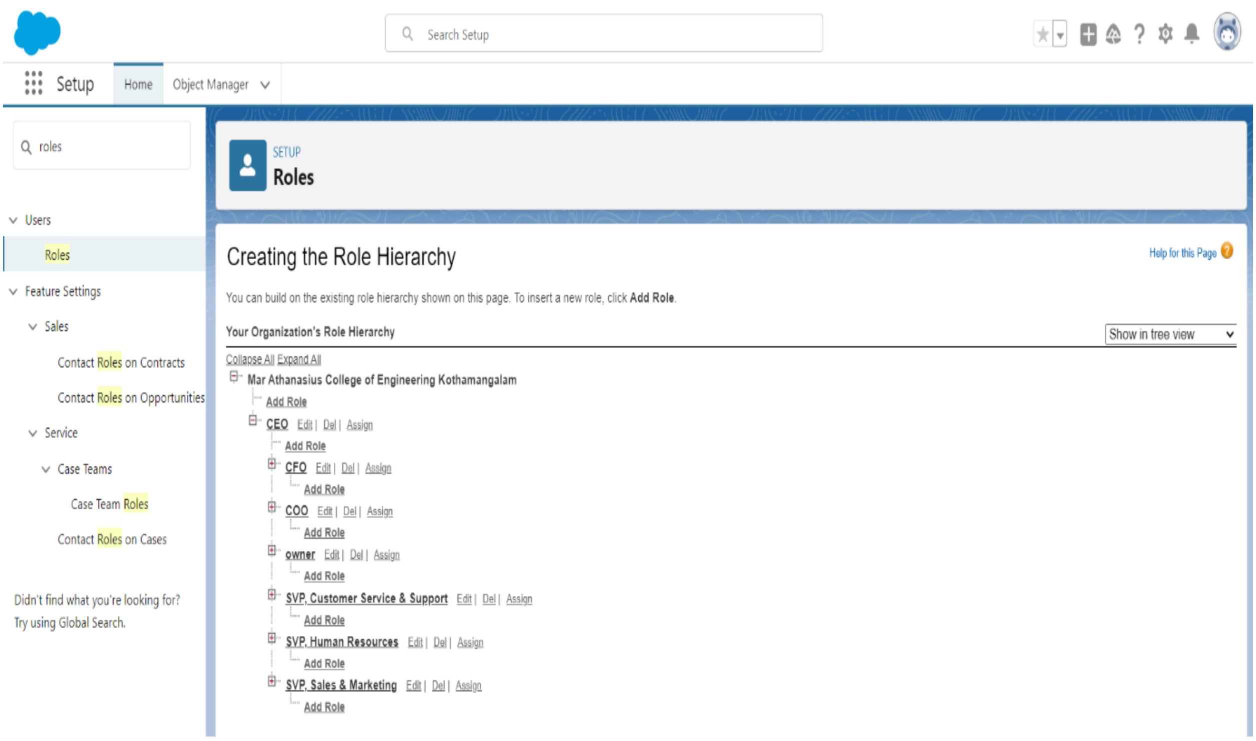



# ROLE AND ROLE HIERARCHY

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in the Salesforce organization can have to data. Simply, it describes what a user could see within the Salesforce organization.

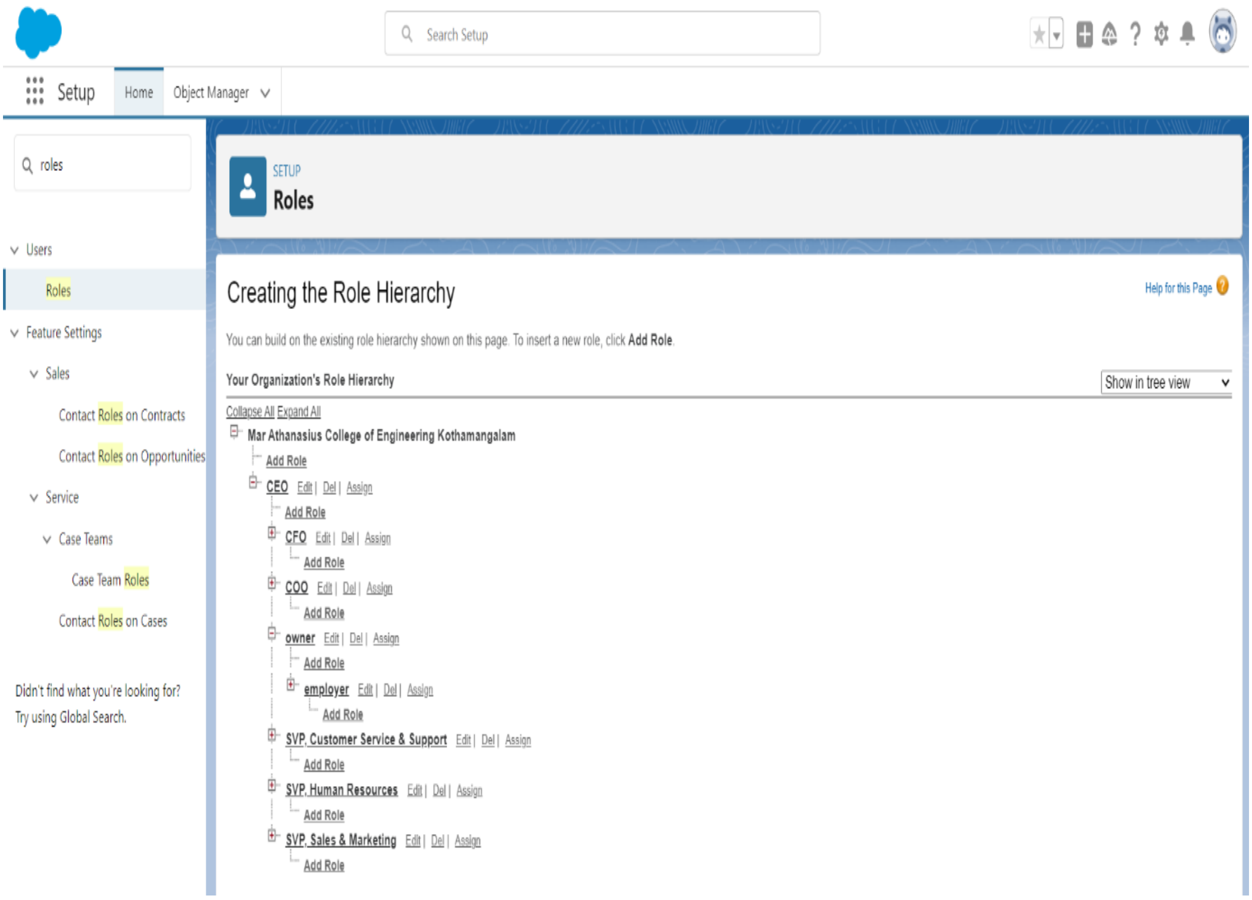
## Creating owner Role

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



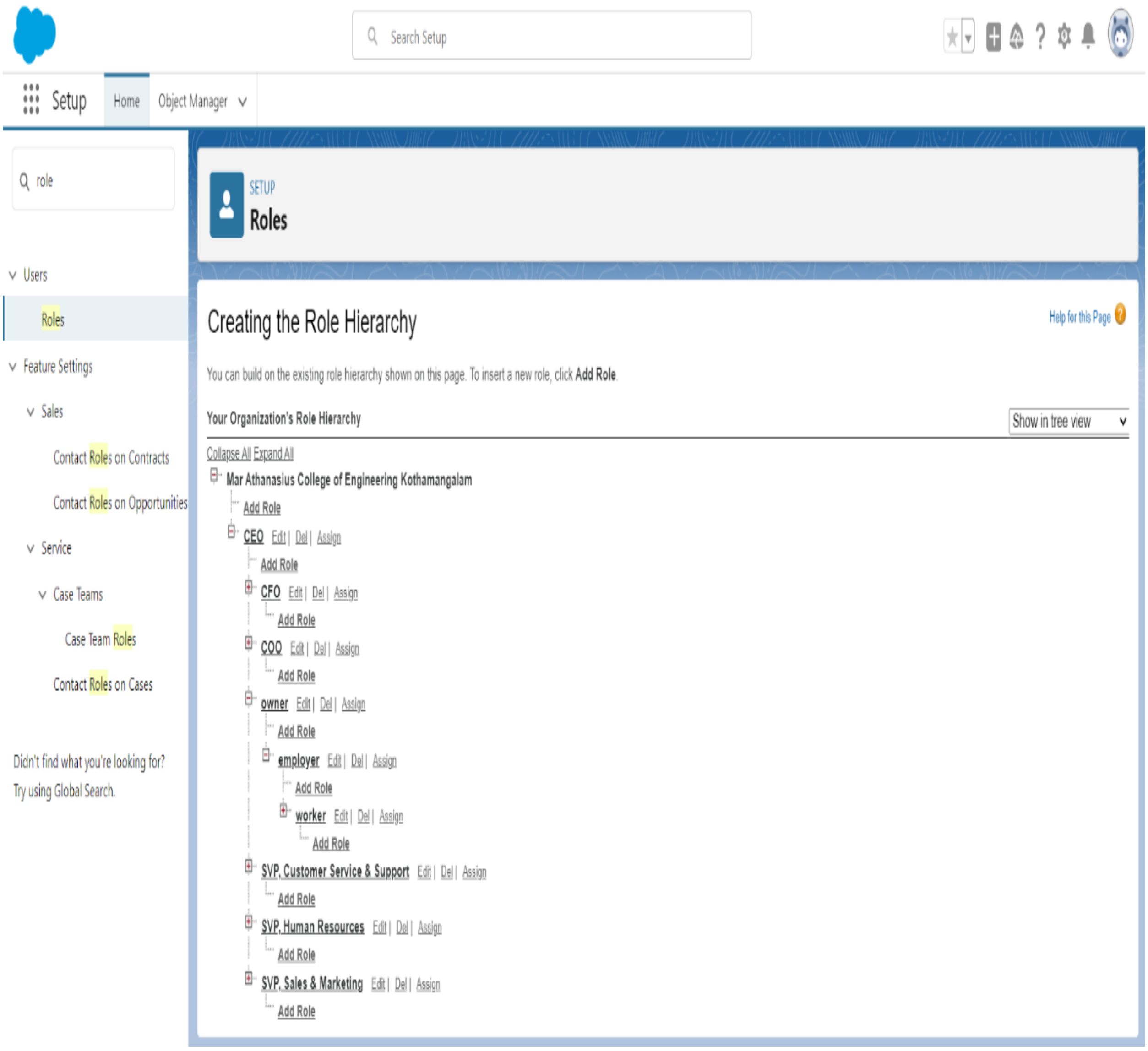

## Creating employer role

1. Go to quick find → Search for Roles → click on set up roles.
2. Click plus on CEO role, and click add role under owner.
3. Give Label as "employer" and Role name gets auto populated. Then click on Save.



## Creating worker role

1. Go to quick find → Search for Roles → click on set up roles.
2. Click plus on CEO role, and click plus on owner, and click add role under employer.
3. Give Label as “worker” and Role name gets auto populated. Then click on Save.




# USERS

A user is anyone who logs in to Salesforce. Users are employees in the company, 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.

Three users are created and given access to them.

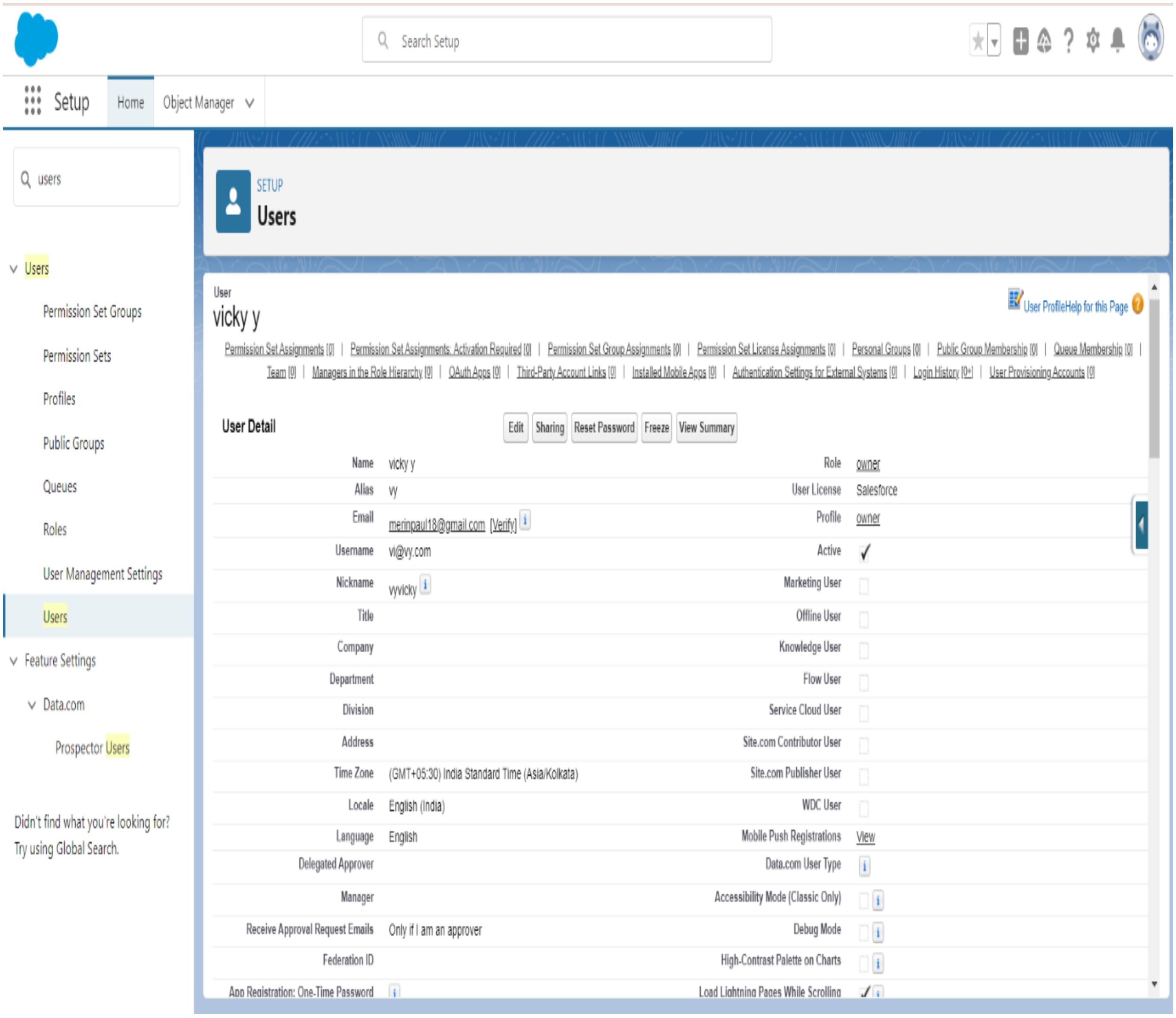
# User 1

1. Go to setup → type users in quick find box → select users → click New user.
2. Fill in the fields

   First Name : vicky
   Last Name : y
   Alias : vy
   Email id : merinpaul18@gmail.com
   Username : vi@vy.com
   Nick Name : vyvicky
   Role : owner
   User license : Salesforce
   Profiles : owner.

3. Save it.

User 1 vicky has got the owner role.



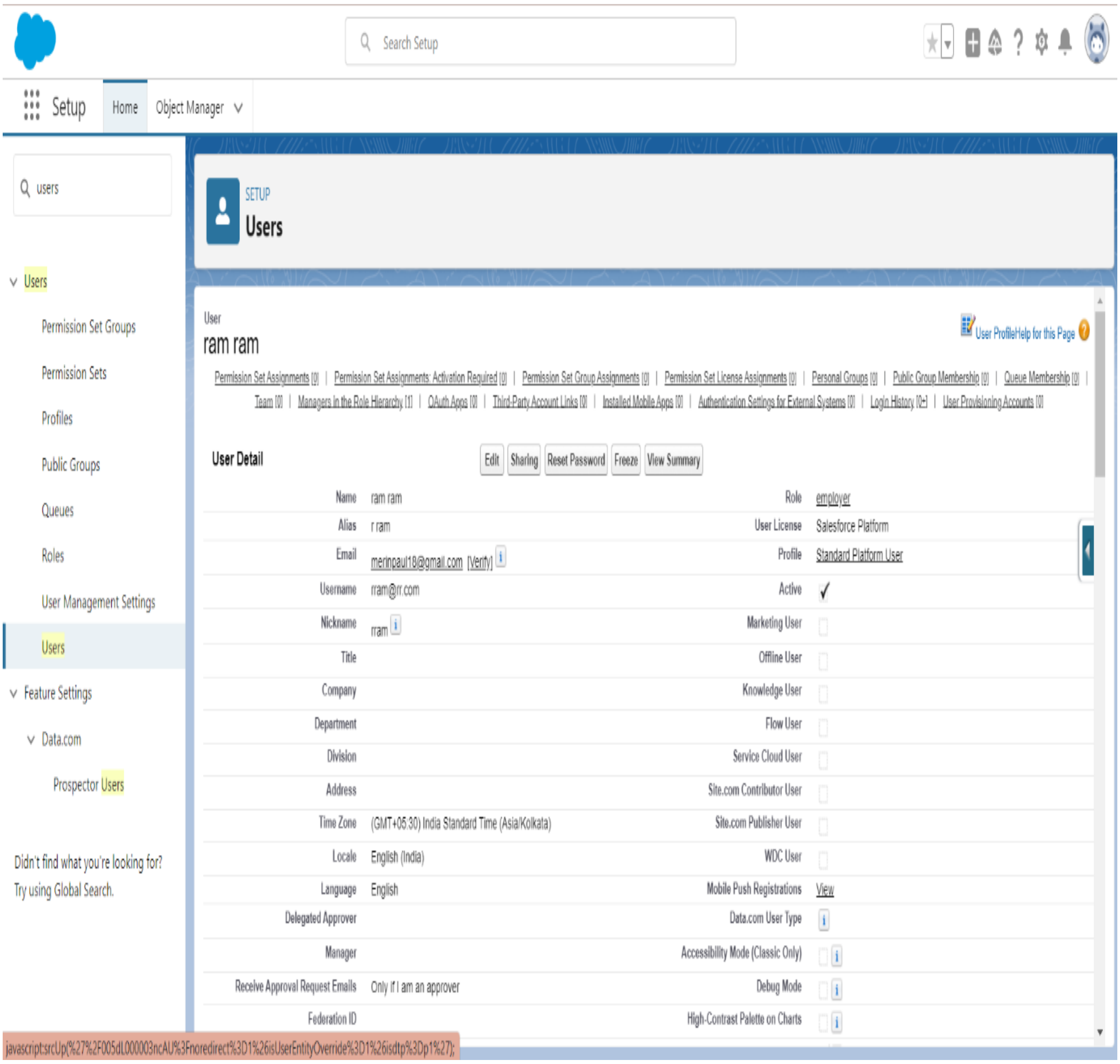
# User 2

1. Go to setup → type users in quick find box → select users → click New user.
2. Fill in the fields

| | |
|---|---|
| First Name | : ram |
| Last Name | : ram |
| Alias | : r ram |
| Email id | : merinpaul18@gmail.com |
| Username | : rram@rr.com |
| Nick Name | : rram |
| Role | : employer |
| User license | : Salesforce platform |
| Profiles | : standard platform user. |

3. Save it.

User 2 ram has got the employer role.



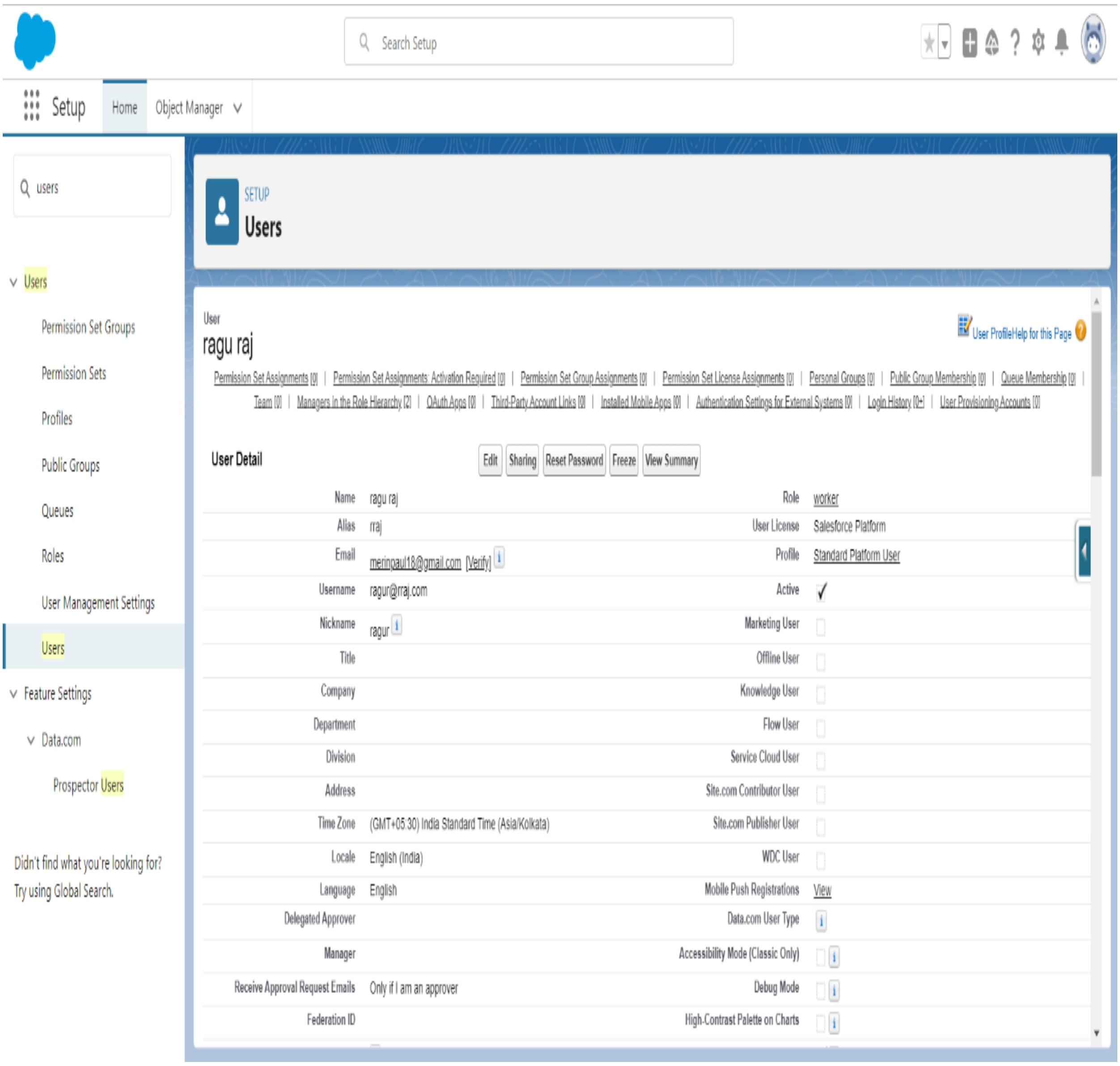
# User 3

1. Go to setup → type users in quick find box → select users → click New user.
2. Fill in the fields

| | |
|---|---|
| First Name | : ragu |
| Last Name | : raj |
| Alias | : rraj |
| Email id | : merinpaul18@gmail.com |
| Username | : ragur@rraj.com |
| Nick Name | : ragur |
| Role | : worker |
| User license | : Salesforce platform |
| Profiles | : standard platform user. |

3. Save it.

User 3 ragu has got the worker role.



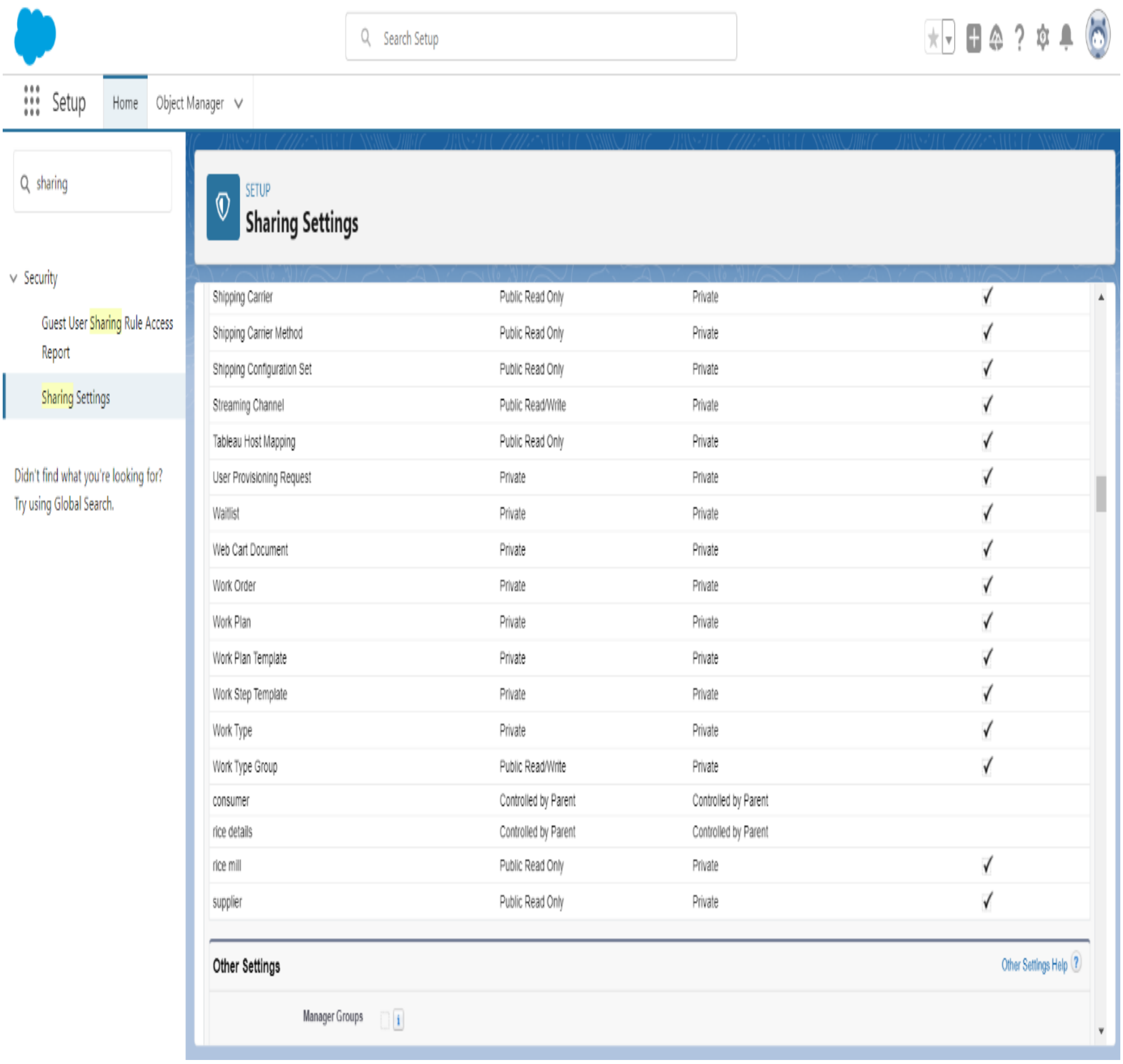
# PERMISSION SETS

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.

OWD settings for rice mill and supplier object has changed to public read only.

**Steps for 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.



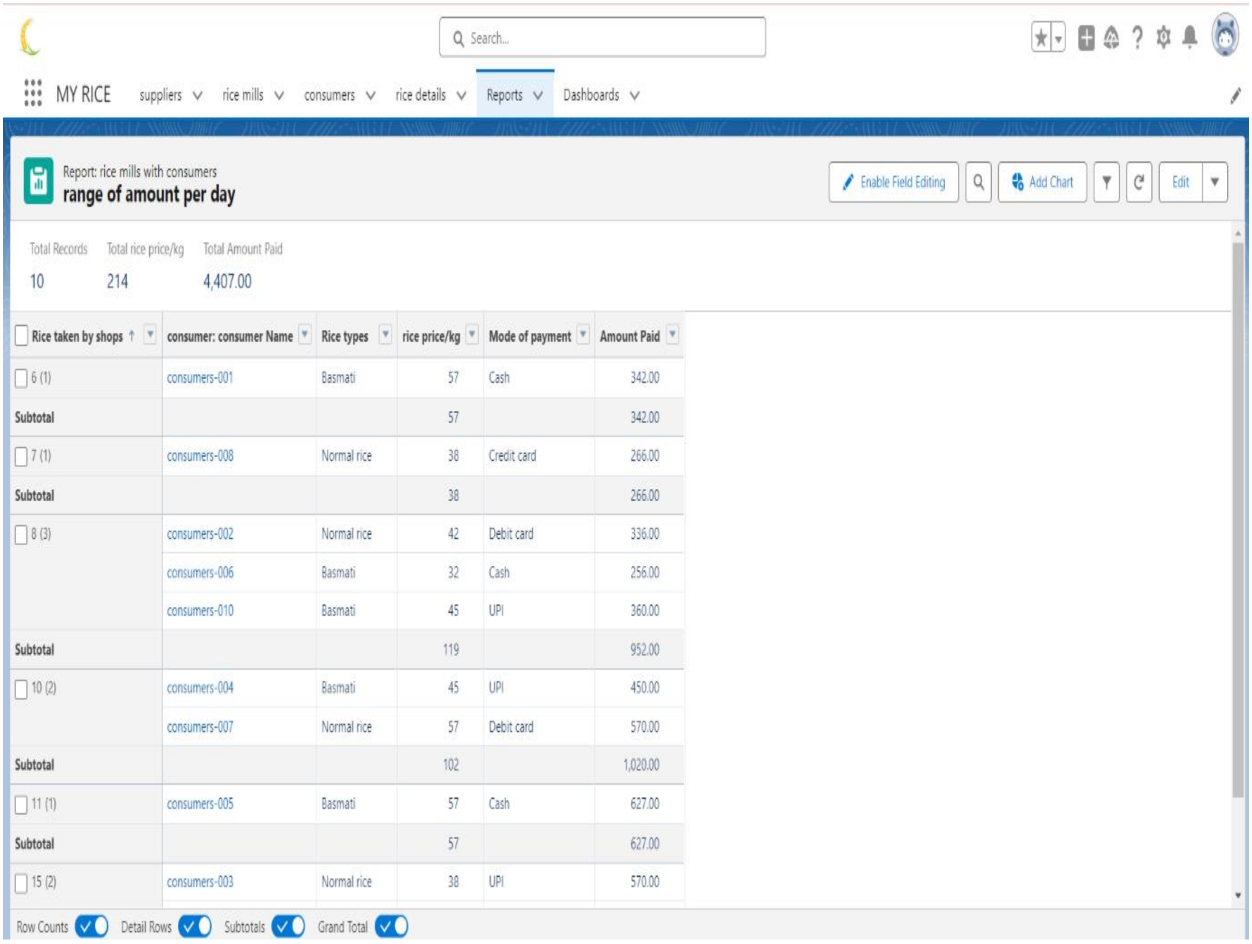
# REPORTS

Reports give the access to the Salesforce data. Can examine the Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.
In Salesforce.com it is easy to generate reports in different styles. And can create reports in a very short time and also schedule the reports. Salesforce provides a powerful suit of analytic tools to help to organize, view and analyze the data.

**Steps for creating reports:**

1. Go to the app → click on the reports tab
2. Click New Report.
3. select for report type, search for “rice mill with consumers” click on it. And click on start report.
4. In outline pane is opened, select the fields:
   1.consumer name
   2.rice type
   3.rice price/kg
   4.mode of payments
   5.amount paid

5. Remove the unnecessary fields.
6. Select the fields that are mentioned below in the GROUP ROWS section.
   a. Rice taken by shops.
7. Click save and run and save the report as “range of amount per day” and save it.

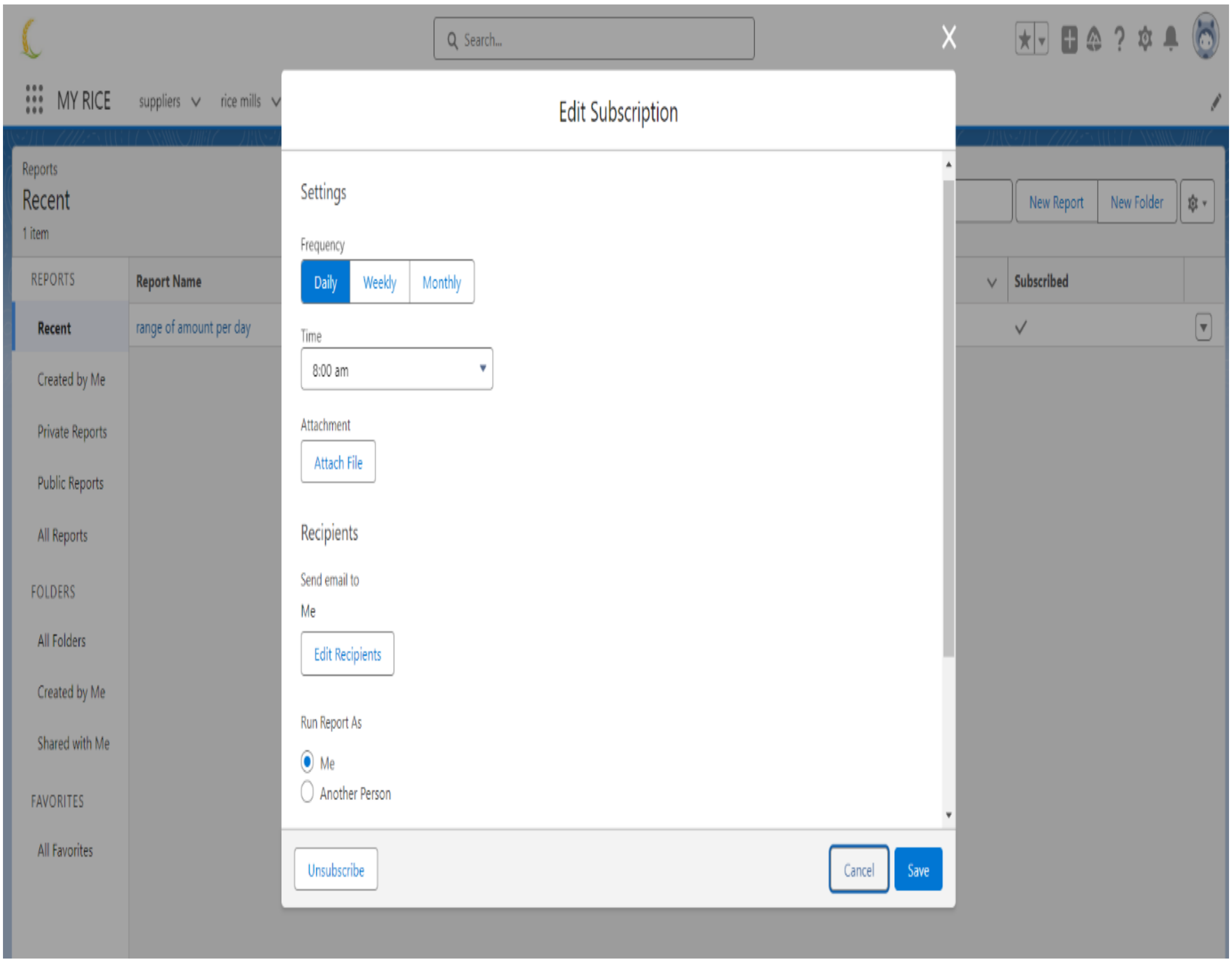



| Rice taken by shops ↑ | consumer: consumer Name | Rice types | rice price/kg | Mode of payment | Amount Paid |
|---|---|---|---|---|---|
| 6 (1) | consumers-001 | Basmati | 57 | Cash | 342.00 |
| Subtotal | | | 57 | | 342.00 |
| 7 (1) | consumers-008 | Normal rice | 38 | Credit card | 266.00 |
| Subtotal | | | 38 | | 266.00 |
| 8 (3) | consumers-002 | Normal rice | 42 | Debit card | 336.00 |
| | consumers-006 | Basmati | 32 | Cash | 256.00 |
| | consumers-010 | Basmati | 45 | UPI | 360.00 |
| Subtotal | | | 119 | | 952.00 |
| 10 (2) | consumers-004 | Basmati | 45 | UPI | 450.00 |
| | consumers-007 | Normal rice | 57 | Debit card | 570.00 |
| Subtotal | | | 102 | | 1,020.00 |
| 11 (1) | consumers-005 | Basmati | 57 | Cash | 627.00 |
| Subtotal | | | 57 | | 627.00 |
| 15 (2) | consumers-003 | Normal rice | 38 | UPI | 570.00 |

In Salesforce, reports are crucial for providing insights and tracking key metrics related to sales, marketing, and service activities. They allow users to compile and analyse data from various sources within the platform, enabling informed decision-making and strategic planning. Reports can be customized to display specific information, such as sales performance, customer interactions, and pipeline status, through various formats like tables, charts, and dashboards. By leveraging Salesforce reports, organizations can identify trends, monitor progress towards goals, and uncover opportunities for improvement, ultimately enhancing overall business performance.
Here a report with fields such as consumer name, rice type, rice price per kilogram, mode of payments, and amount paid is created which allows for the comprehensive tracking and analysis of rice sales transactions. This report can be customized to show detailed information about each transaction, including which consumers purchased specific rice types, the price they paid per kilogram, the total amount paid, and their chosen payment methods. By organizing this data in a structured report, businesses can identify purchasing patterns, assess payment preferences, and evaluate revenue generated from different rice types. This insight aids in strategic planning, inventory management, and optimizing sales processes.

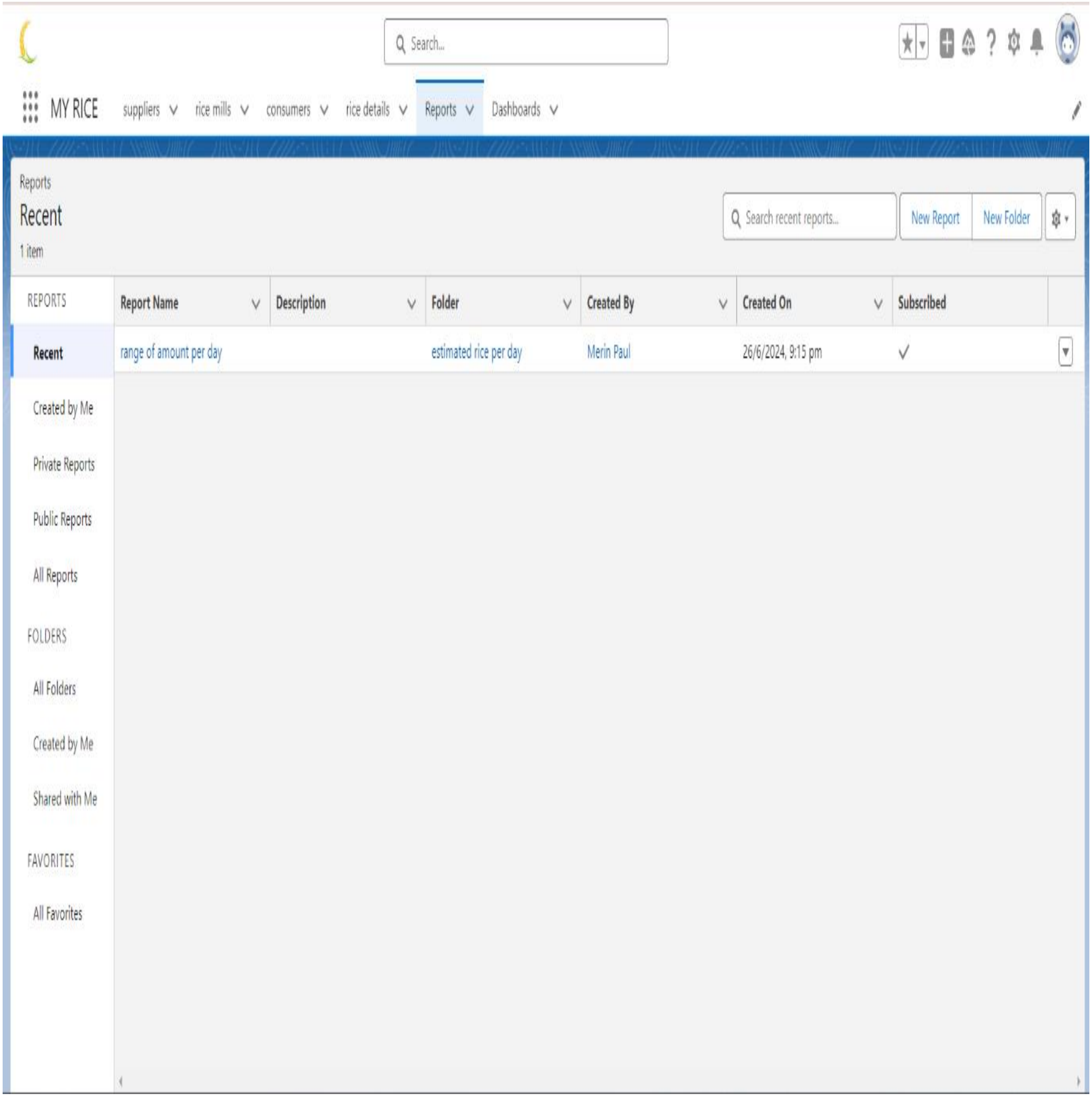
**Sharing report to owner**

1. Click edit drop down and select subscribe option
2. After selecting the run report as a "another person" select the account for whom it wants to send that mail to.
3. Click save.



**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.
6. navigate to app launcher and click reports on that.
7. click all reports.
8. Select the range of amount per day drop down in that click move.
9. Select estimated rice per day folder and select folder.

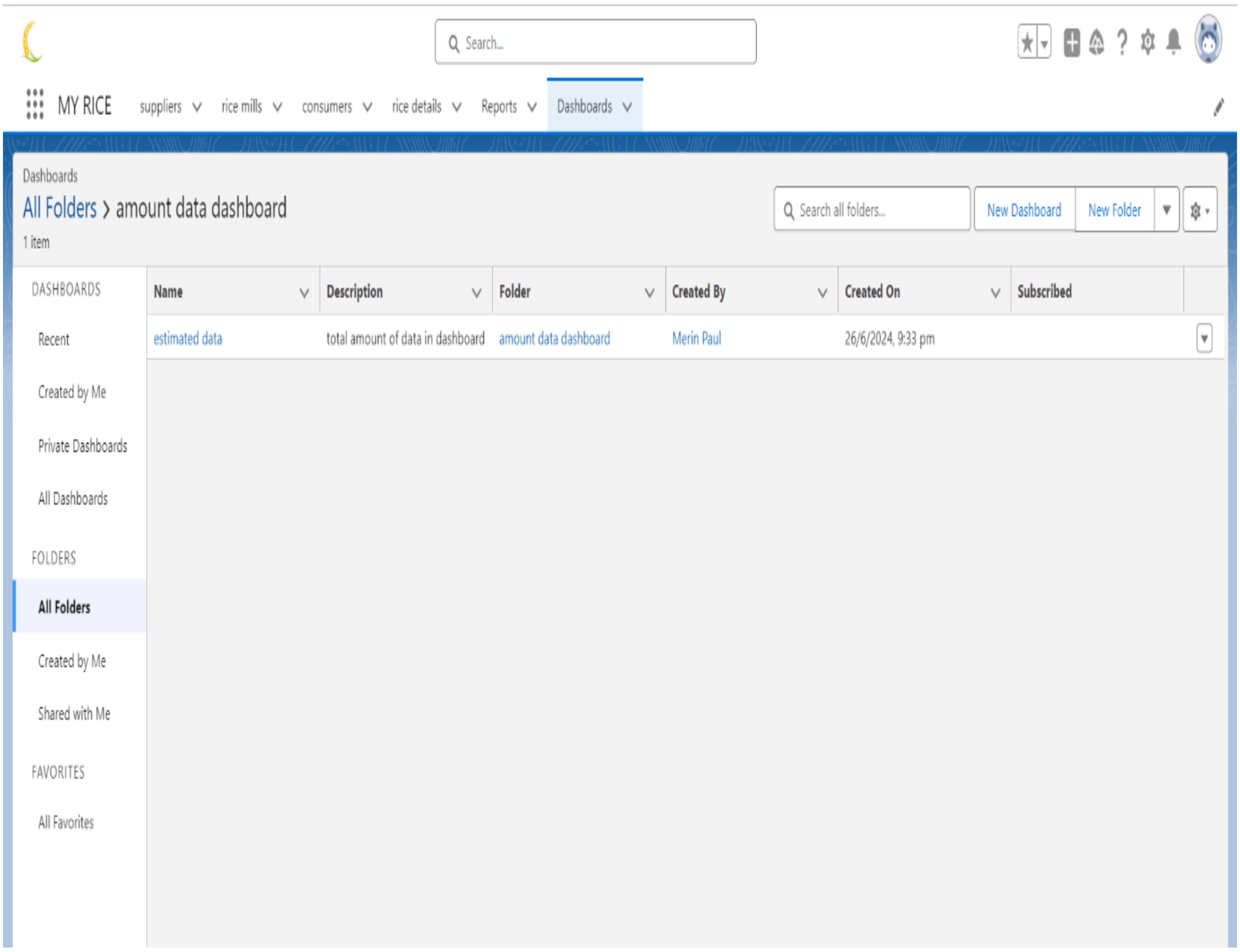


# DASHBOARDS

Dashboards helps to visually understand changing business conditions so it can help in making decisions based on the real-time data that have 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.

**Steps to 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.

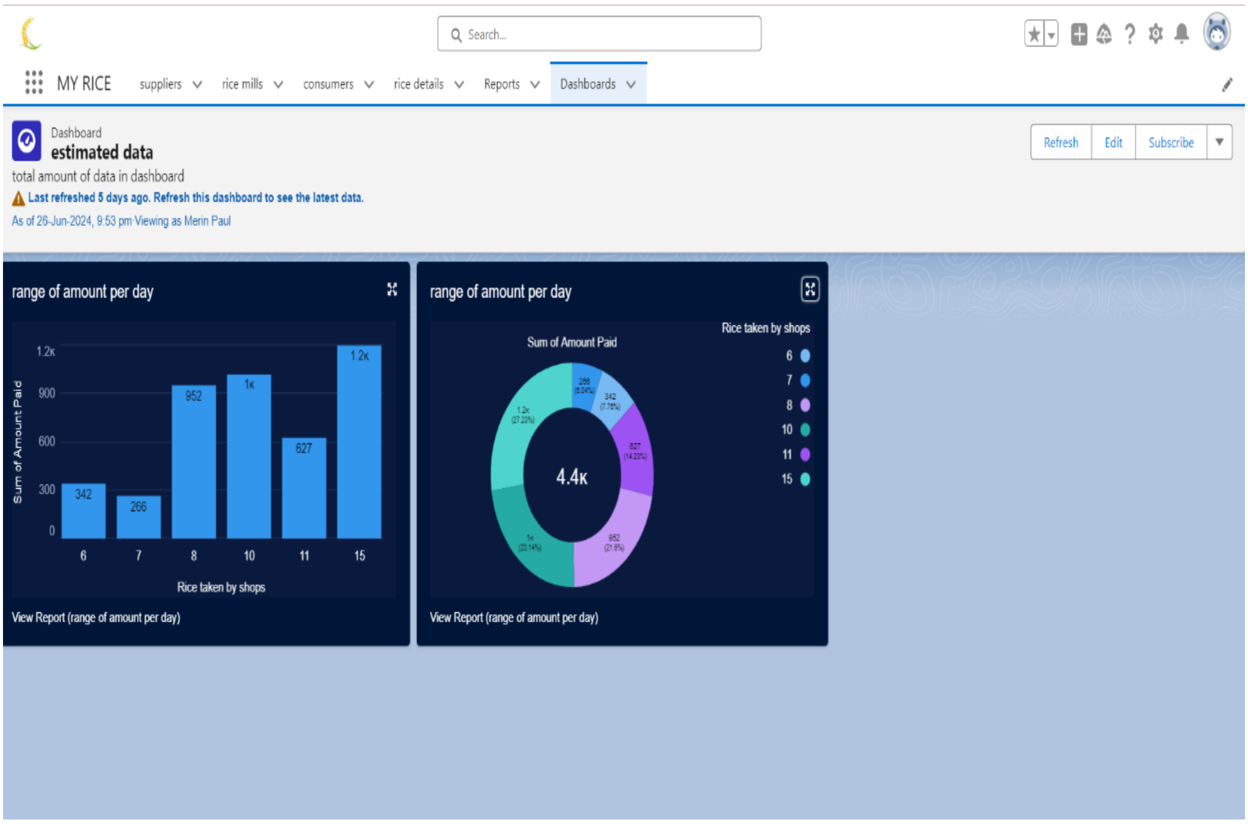



**Steps to create Dashboard:**

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 Widget → Chart or Table.
4. Select a Report and click on select.
5. Fill in details.
   1. Display as- vertical bar chart
   2. X-axis - rice taken by shops
   3. Y-axis- sum of amount

4. Y-axis range - automatic
5. Sort by - rice taken by shops
6. Component theme - dark.

6. Add the component
7. Again, select widget 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
8. Click add.
9. Click save and done.




In Salesforce, dashboards are powerful tools that provide a visual representation of key business metrics and performance indicators. They aggregate data from multiple reports, presenting it in an easily digestible format through charts, graphs, and tables. Dashboards enable users to monitor real-time data, track progress towards goals, and make data-driven decisions quickly. By customizing dashboards to display relevant metrics, different teams can focus on their specific objectives, such as sales targets, customer service efficiency, or marketing campaign performance. Ultimately, dashboards enhance visibility and accountability across the organization, facilitating better strategic planning and execution.

Here dashboard is used to display the amount of rice taken by shops using a vertical bar chart. This involves configuring the X-axis to represent the shops, while the Y-axis displays the sum of the amount of rice taken. The Y-axis range will be set to automatic, ensuring it adjusts dynamically based on the data. Additionally, the chart will be sorted by the amount of rice taken by each shop, making it easy to compare and analyse the data at a glance. This setup provides a clear visual representation of rice distribution among shops, aiding in efficient monitoring and decision-making.