

A CRM APPLICATION FOR WHOLESALE RICE MILL

Category: Salesforce:

DESCRIPTION :

The Rice Mill Customer Relationship Management (CRM) application is an all-in-one system that condenses various reports on the amount of rice produced in a day, the total number of sales made, and their types for distribution to managers every day. It makes use of CRM for improved customer experiences and increased efficiency in mill production activities. The aim of this project is to build an easy-to-use application that meets the requirements inherent in milling industry .

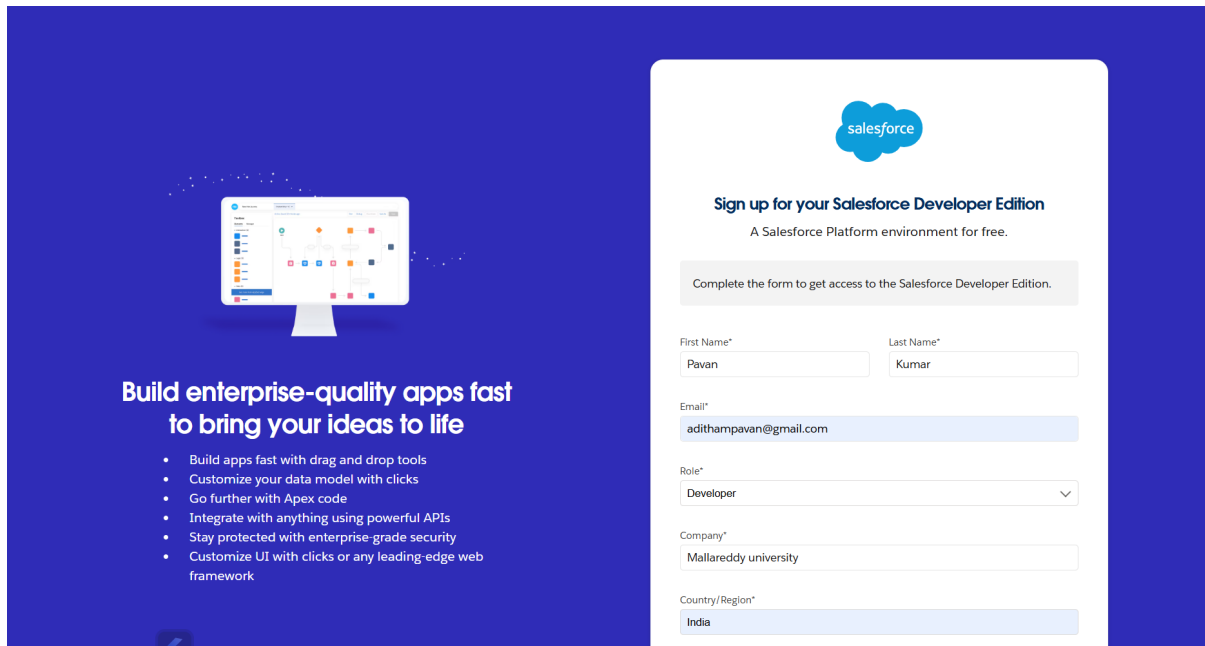
INTRODUCTION TO SALESFORCE

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has got everything you need to run your business from anywhere. With its standard products and features, you can relate with prospects and clients as well as work with employees and partners in a joint manner. The company also offers a cloud data storage system that guarantees the security of your files.

Activity 1: Creating Developer Account:

Creating a developer org in salesforce.

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



The image shows the Salesforce Developer Edition sign-up page. On the left, there's a blue background with a monitor icon displaying a Salesforce interface and the text "Build enterprise-quality apps fast to bring your ideas to life". Below this is a list of bullet points: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". On the right, there's a white form titled "Sign up for your Salesforce Developer Edition" with the subtitle "A Salesforce Platform environment for free." and a note "Complete the form to get access to the Salesforce Developer Edition." The form fields are: First Name* (Pavan), Last Name* (Kumar), Email* (adithampavan@gmail.com), Role* (Developer), Company* (Mallareddy university), and Country/Region* (India).

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A Salesforce Platform environment for free.

Complete the form to get access to the Salesforce Developer Edition.

First Name* Pavan Last Name* Kumar

Email* adithampavan@gmail.com

Role* Developer

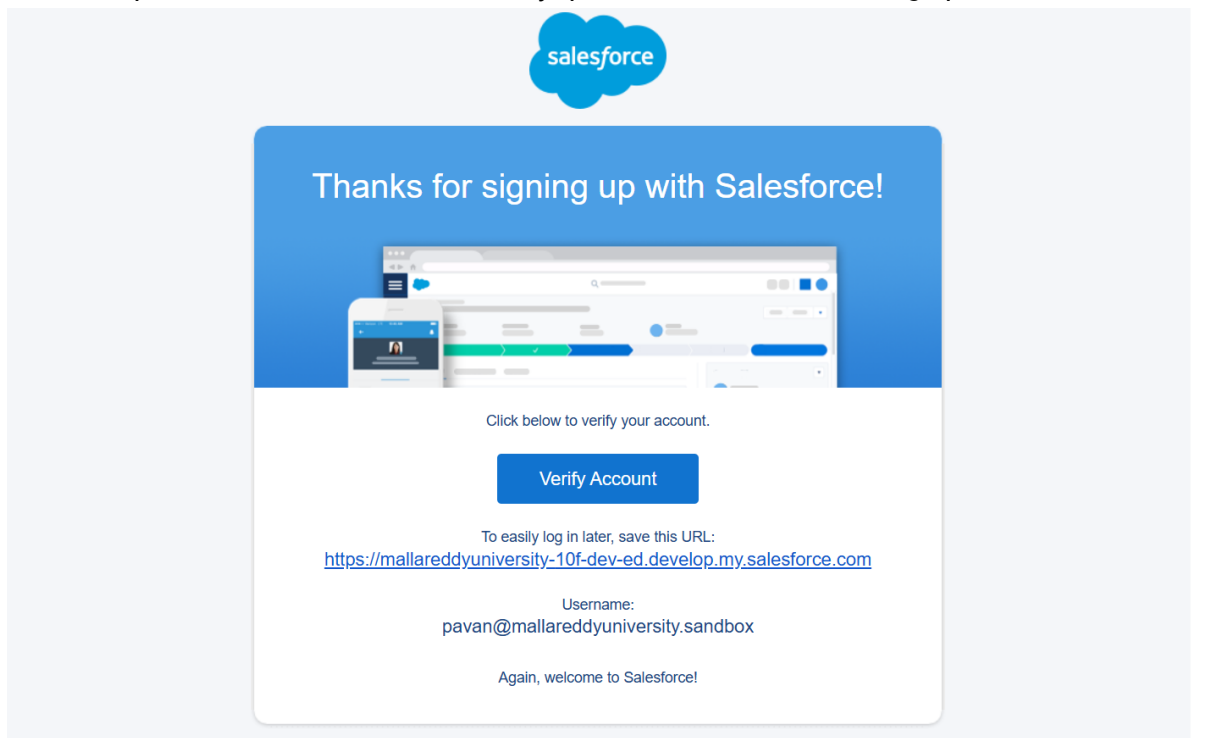
Company* Mallareddy university

Country/Region* India

STEP:2

2. Click on Verify Account

3. Give a password and answer a security question and click on change password



The image shows the Salesforce account verification page. At the top, there's a blue header with the Salesforce logo and the text "Thanks for signing up with Salesforce!". Below this is a blue box with a white background containing a graphic of a smartphone and a laptop displaying the Salesforce interface. Below the graphic, there's a white box with the text "Click below to verify your account." and a blue button labeled "Verify Account". Below the button, there's a URL: "https://mallareddyuniversity-10f-dev-ed.develop.my.salesforce.com". Below the URL, there's a username: "pavan@mallareddyuniversity.sandbox". At the bottom, there's a message: "Again, welcome to Salesforce!"

Thanks for signing up with Salesforce!

Click below to verify your account.

Verify Account

To easily log in later, save this URL:
<https://mallareddyuniversity-10f-dev-ed.develop.my.salesforce.com>

Username:
pavan@mallareddyuniversity.sandbox

Again, welcome to Salesforce!

OBJECT

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects Salesforce objects are of two types:

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

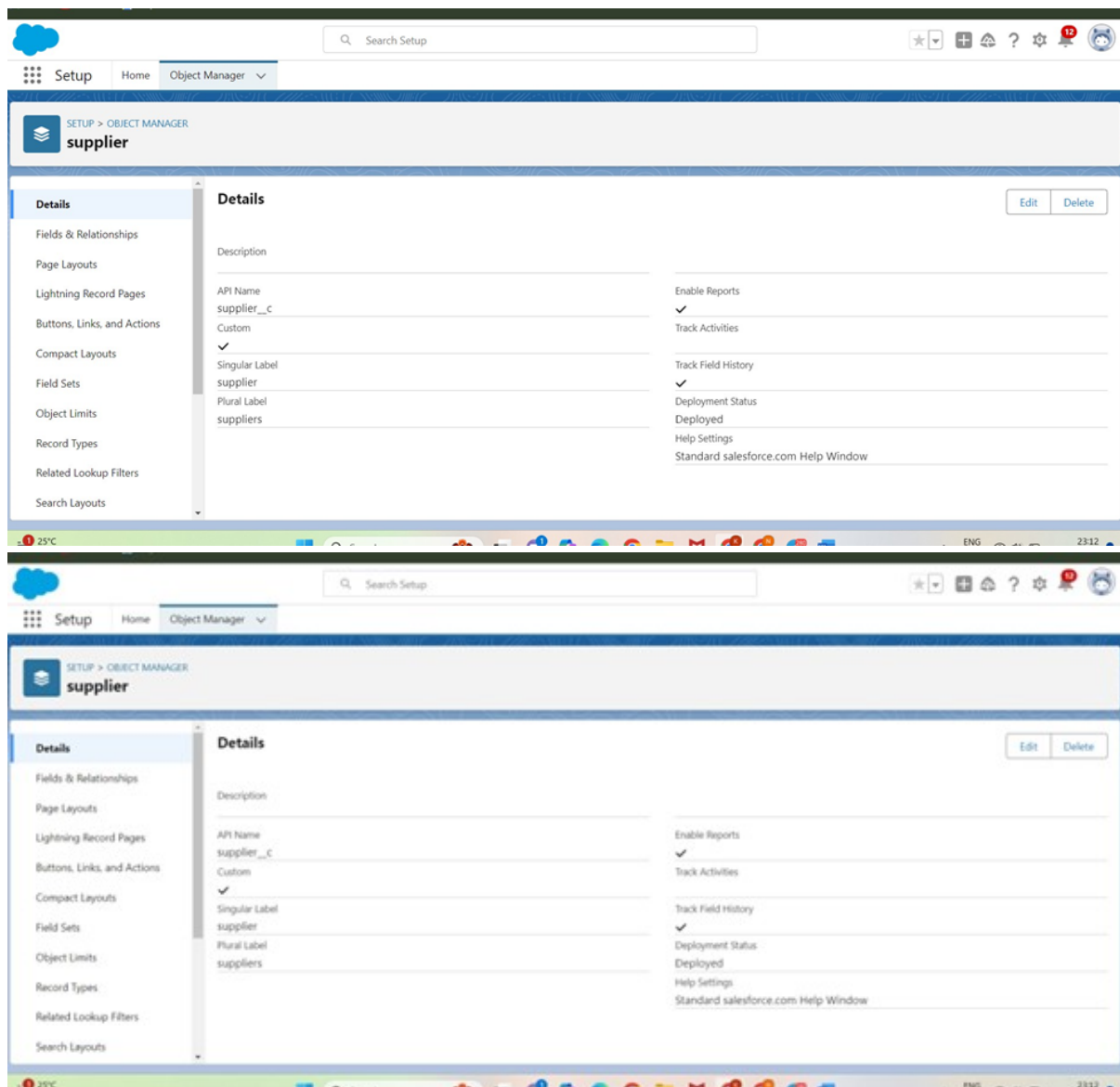
To Navigate to Setup page:

Click on gear icon → click setup.

To create an object:

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

Activity 1: Create Supplier Object:



Activity 2: Create Rice mill Object:

The screenshot shows the Salesforce Setup interface for the 'rice mill' object. The left sidebar contains a list of configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The 'Details' section is selected, showing the following configuration:

Field	Value
Description	
API Name	rice_mill__c
Custom	<input checked="" type="checkbox"/>
Singular Label	rice mill
Plural Label	rice mills
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input type="checkbox"/>
Track Field History	<input checked="" type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are visible in the top right corner.

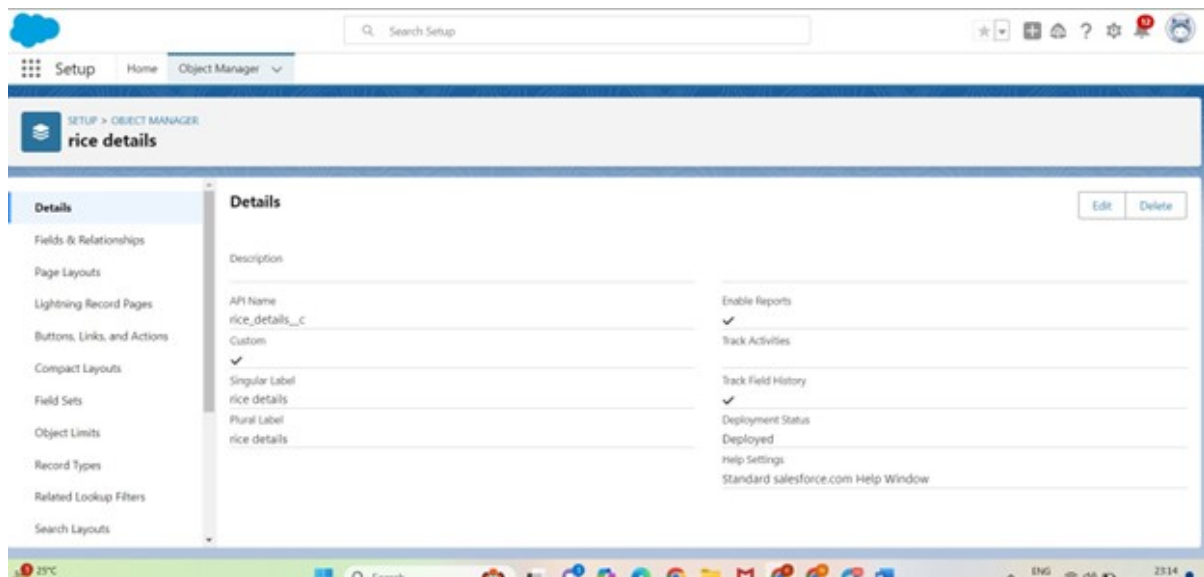
Activity 3: Create consumer Objects:

The screenshot shows the Salesforce Setup interface for the 'consumer' object. The left sidebar contains a list of configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The 'Details' section is selected, showing the following configuration:

Field	Value
Description	
API Name	consumer__c
Custom	<input checked="" type="checkbox"/>
Singular Label	consumer
Plural Label	consumers
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input type="checkbox"/>
Track Field History	<input checked="" type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are visible in the top right corner.

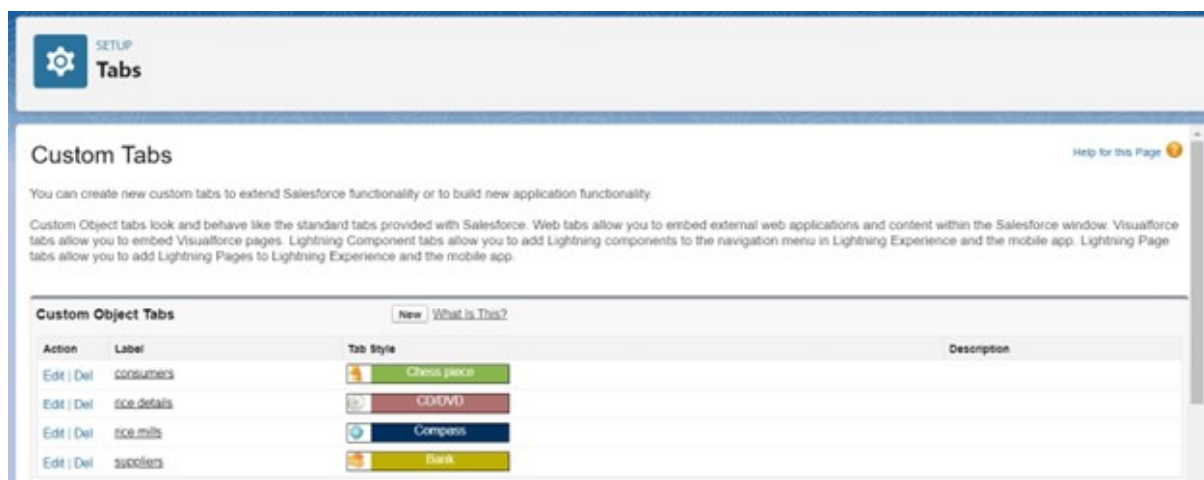
Activity 4: Create rice details Objects:



TABS

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

Activity 1: Creating a Custom Tab Activity 2: Creating Remaining Tabs

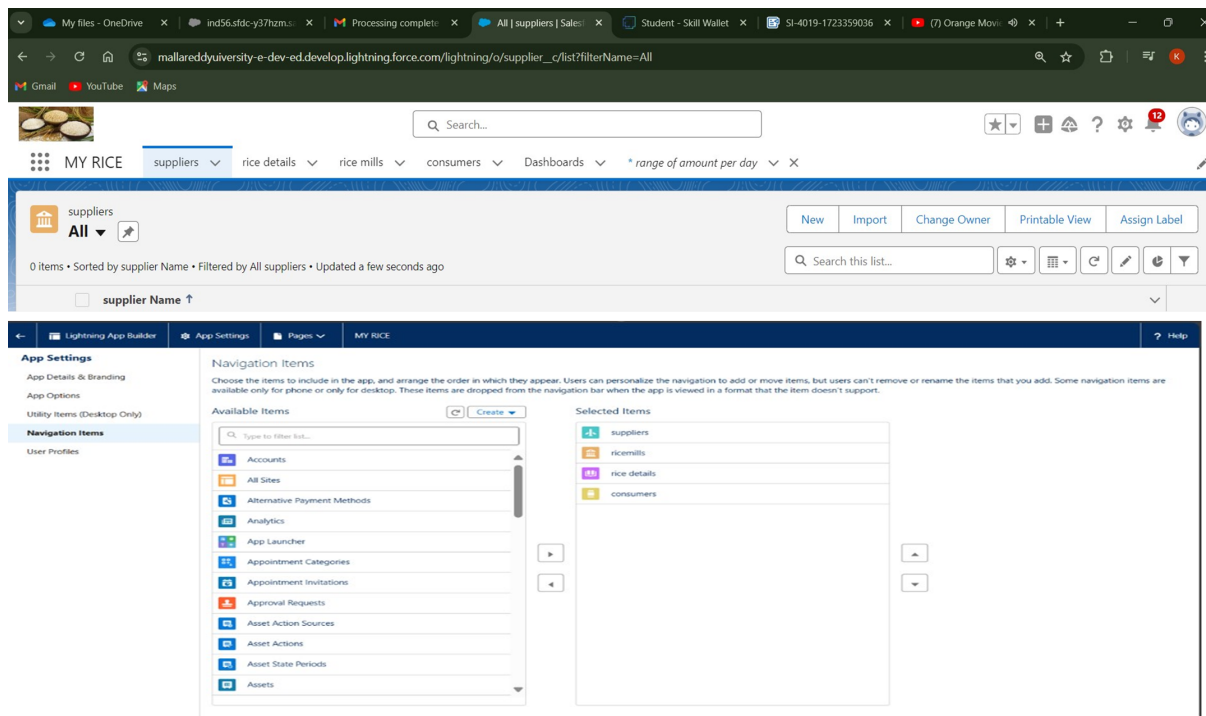


THE LIGHTNING APP

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

Activity 1: Create a Lightning App



FIELDS

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

Activity 1: Creating the number field in rice details object

Custom Field Definition Detail			
		Edit	Set Field-Level Security
		View Field Accessibility	Where is this used?
Field Information			
Field Label	rice distributed	Object Name	rice details
Field Name	rice_distributed	Data Type	Number
API Name	rice_distributed__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Pavan kumar, 24/10/2024, 10:53 am	Modified By	Pavan kumar, 24/10/2024, 10:53 am

Activity 2 : Creating Junction Object :

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	Pavan kumar, 24/10/2024, 10:56 am	Modified By	Pavan kumar, 24/10/2024, 10:56 am

Activity 3 : Creating a Master-Detail Relationship

Field Information			
Field Label	rice mill 1(one)	Object Name	rice details
Field Name	rice_mill	Data Type	Master-Detail
API Name	rice_mill__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Pavan kumar , 24/10/2024, 11:00 am	Modified By	Pavan kumar , 24/10/2024, 11:00 am

Activity 4 : Creating the Roll-up Summary

supplier Custom Field

sum of rice distributed

[Back to supplier](#)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information			
Field Label	sum of rice distributed	Object Name	supplier
Field Name	sum_of_rice_distributed		
API Name	sum_of_rice_distributed__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Pavan kumar , 24/10/2024, 11:07 am	Modified By	Pavan kumar , 24/10/2024, 11:07 am

Custom Field Definition
Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information			
Field Label	rice taken	Object Name	rice_mill
Field Name	rice_taken		
API Name	rice_taken__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Pavan kumar, 24/10/2024, 11:33 am	Modified By	Pavan kumar, 24/10/2024, 11:33 am

Activity 5 : Creating Fields in Objects Creating the number field in rice details object

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

List View Button Layout

Restriction Rules

Quick Find

New

Deleted Fields

Field Dependencies

Set History

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(one)	rice_mill__c	Master-Detail(rice mill)		✓
supplier Name	supplier__c	Master-Detail(supplier)		✓

Activity 6: Creating Fields in rice mill Objects

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

rice mill

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

Object Access

Quick Find

New

Deleted Fields

Field Dependencies

Set History

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 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)		

Activity 7: Creating Fields in consumer Objects

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

Quick Find

New

Deleted Fields

Field Dependencies

Set History

14 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
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(100)	
Last Modified By	LastModifiedById	Lookup(User)	
Last name	Last_name__c	Text(100)	
		Picklist	

Activity 8 : Creating Cross Object Formula Field in consumer Object

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

consumer Custom Field

Amount Paid

Back to consumer

Custom Field Definition

Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this field used?

Set Field-Level Security

Field Information

Field Label	Amount Paid	Object Name	consumer
Field Name	Amount_Paid		
API Name	Amount_Paid__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Pavan kumar, 24/10/2024, 12:14 pm	Modified By	Pavan kumar, 24/10/2024, 12:14 pm

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

consumer Custom Field

Consumer Name

Back to consumer

Help for this Page ?

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Consumer Name	Object Name	consumer
Field Name	consumer Custom Field: Consumer Name ~ Salesforce - Developer Edition		
API Name	Consumer_Name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Pavan kumar, 24/10/2024, 12:16 pm	Modified By	Pavan kumar, 24/10/2024, 12:16 pm

Activity 9 : Creating the validation rule

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

consumer Validation Rule

Back to consumer

Help for this Page ?

Validation Rule Detail

Edit

Clone

Rule Name	Phonenumberoremailblankrule	Active	<input checked="" type="checkbox"/>
Error Condition Formula	OR(ISBLANK(\$Phone), ISBLANK(\$Email))		
Error Message	please fill in your phone number.	Error Location	Top of Page
Description	phone number and email number should not be blank		
Created By	Pavan kumar, 24/10/2024, 12:21 pm	Modified By	Pavan kumar, 24/10/2024, 12:21 pm

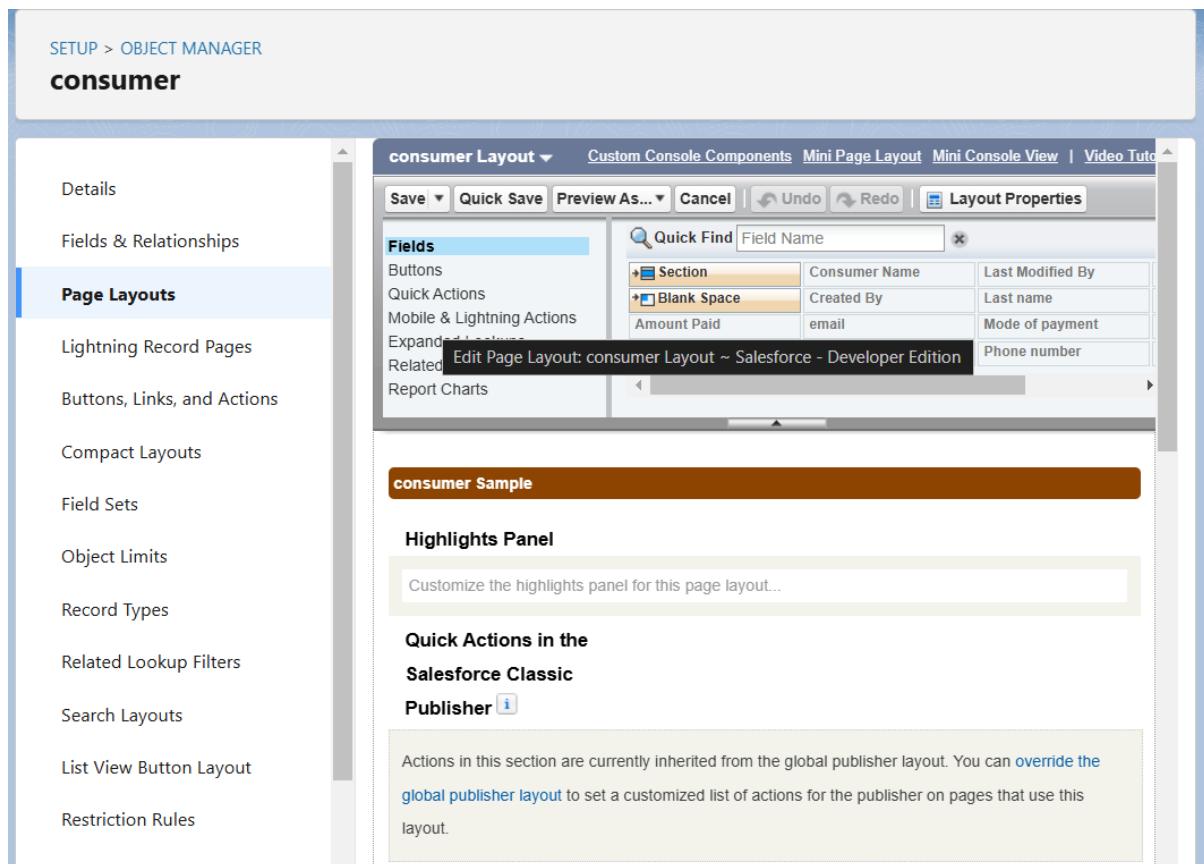
Edit

Clone

PAGE LAYOUTS

Page Layout in Salesforce allows us to customize the design and organize detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages. **Activity 1 : creating the page**

layout



PROFILES

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

Activity 1: owner Profile

Setup

Home
Object Manager

Users

Profiles

Didn't find what you're looking for?
Try using Global Search.

SETUP

Profiles

Profile
owner

[Help for this Page](#)

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) | [Enabled External Credential Principal Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[0\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) | [Enabled Custom Permissions \[0\]](#)

Profile Detail

EditCloneDeleteView Users

Name	owner		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Pavan kumar, 24/10/2024, 2:32 pm	Modified By	Pavan kumar, 24/10/2024, 2:32 pm

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Invoice	Invoice Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Invoice Line	Invoice Line Layout [View Assignment]
Home Page	DE Default	Lead	Lead Layout

Activity 2: employer Profile



🔍 prof

▼ Users

Profiles

Didn't find what you're looking for?
Try using Global Search.

Profile

employer

[Help for this Page](#) 

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#)
[Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) |
[Enabled Named Credential Access \[0\]](#) | [Enabled External Credential Principal Access \[0\]](#) |
[Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[0\]](#)
[Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) |
[Enabled Custom Permissions \[0\]](#)

Profile Detail

Edit

Clone

Delete

View Users

Name employer

User License	Salesforce Platform
--------------	---------------------

Custom Profile ☒

Description

Created By Pavan kumar,
24/10/2024, 2:30 pm

Modified By Pavan kumar,
24/10/2024, 2:31 pm

Page Layouts

Standard Object Layouts

Global [Global Layout](#)
[[View Assignment](#)]

Fulfillment Order Item Tax	Fulfillment Order Item Tax Layout [View Assignment]

Email	Not Assigned
-------	--------------

Fulfillment	<u>Fulfillment Order Product</u>
1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10	10
11	11
12	12
13	13
14	14
15	15
16	16
17	17
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95	95
96	96
97	97
98	98
99	99
100	100

Activity 3: worker Profile

Activity 1: Creating owner Role Activity 2: Creating employer roles

Setup

Home

Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector

Users

Didn't find what you're looking for?

Try using Global Search.

SETUP

Users

User

pavan1 yadav

User Profile Help for this Page

Permission Set Assignments (0)

Permission Set Assignments: Activation Required (0)

Permission Set Group Assignments (0)

Permission Set License Assignments (0)

Personal Groups (0)

Public Group Membership (0)

Queue Membership (0)

Team (0)

Managers in the Role Hierarchy (0)

OAuth Apps (0)

Third-Party Account Links (0)

Managers in the Role Hierarchy

Managers in the Role Hierarchy Help

No records to display

Freeze View Summary

Name	pavan1 yadav	Role	employer
Alias	pyada	User License	Salesforce Platform
Email	adithampavan@gmail.com [Verify]	Profile	Standard Platform User
Username	adithampavan1@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User172994095031858184	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>

PERMISSION SETS

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles and are the recommended way to manage your users' permissions.

Activity 1: Creating OWD setting.

Setup

Home

Object Manager ▾

Q sharing

Security

Guest User Sharing Rule Access Report

Sharing Settings

Didn't find what you're looking for?
Try using Global Search.

SETUP

Sharing Settings

Help for this Page ?

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects ▾

Disable External Sharing Model

Default Sharing Settings

Organization-Wide Defaults

Edit

[Organization-Wide Defaults Help ?](#)

Object	Default Internal Access	Default External Access	Grant Access Using
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓

REPORTS

Activity 1: Create Report



Search...



MY RICE suppliers rice details rice mills consumers Dashboards range of amount per day

Report: rice mills with consumers

range of amount per day

11

150

9,050.00

Rice taken by shops

5 (2)

consumers-009

consumers-008

1.basmati

50

Cash

250.00

6 (2)

consumers-010

consumers-011

2.normal rice

50

Cash

300.00

8 (1)

consumers-001

2.normal rice

50

Cash

400.00

10 (1)

consumers-002

1.basmati

50

Cash

500.00

12 (1)

consumers-003

1.basmati

50

Cash

600.00

15 (1)

consumers-004

1.basmati

50

Cash

750.00

16 (1)

consumers-005

2.normal rice

50

Cash

800.00

18 (1)

consumers-006

2.normal rice

50

Cash

900.00

80 (1)

consumers-007

1.basmati

50

Net banking

4,000.00

Total (11)

150

9,050.00

Enable Field Editing

Add Chart

Edit

Row Counts

Detail Rows

Subtotals

Grand Total

Edit Subscription

Settings

Frequency

Daily

Weekly

Monthly


Time

8:00 am

Attachment

Attach File

Recipients

 Recipients see the same report data as the person running the report.

Send email to

Me

Edit Recipients

Run Report As



Me



Another Person



Pavan kumar



Unsubscribe

Cancel

Save

DASHBOARDS

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

Activity 1: Create Dashboard Folder Activity 2: Create Dashboard

MY RICE

rice mills

supplier

* Recent | Dashboards

* More

Dashboards

Recent

1 item

Search recent dashboards...

New Dashboard

New Folder

DASHBOARDS	Dash...	De... ↑	Folder	Creat...	Creat...	Subscribed	
Recent	estimated data	to Description amount of data in dashboards	amount data dashboard	Pavan kumar	26/10/2024, 5:38 pm		
Created by Me							
Private Dashboards							
All Dashboards							
FOLDERS							
All Folders							
Created by Me							
Shared with Me							
FAVORITES							
All Favorites							

PROJECT DONE
BY
PAVAN KUMAR .A