

A CRM APPLICATION FOR WHOLESALE RICE MILL

The Rice Mill CRM Application is designed to streamline daily operations by tracking rice production, sales, and types of rice sold, generating daily reports for owners. Leveraging CRM, it enhances customer experiences, optimizes store operations, and improves overall efficiency in the rice mill factory. This user-friendly and feature-rich solution addresses the specific needs of a rice mill, ensuring comprehensive management and reporting. The application's goal is to simplify processes, enhance data accuracy, and provide valuable insights into daily performance, ultimately driving better decision-making and operational success.

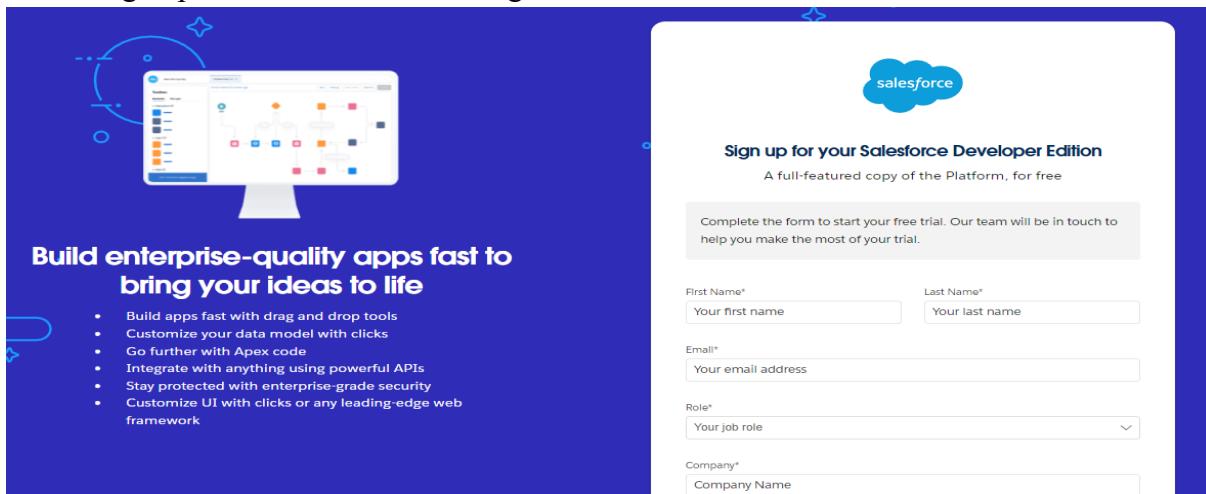
PROCEDURE TO BUILT THE WHOLESALE RICE MILL CRM APPLICATION

MILESTONE 1 - SALESFORCE

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 :



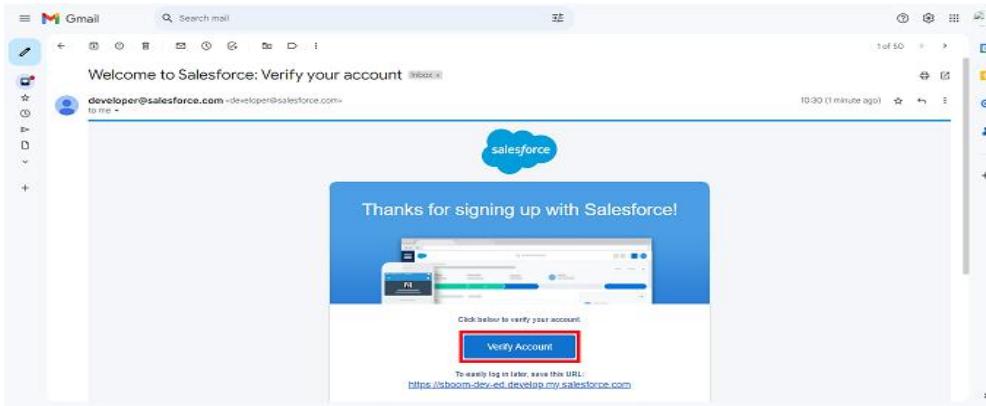
- 1) First name & Last name
- 2) Email
- 3) Role : Developer
- 4) Company : College Name
- 5) County : India
- 6) Postal Code : pin code
- 7) Username : should be a combination of your name and company

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.

Activity 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.

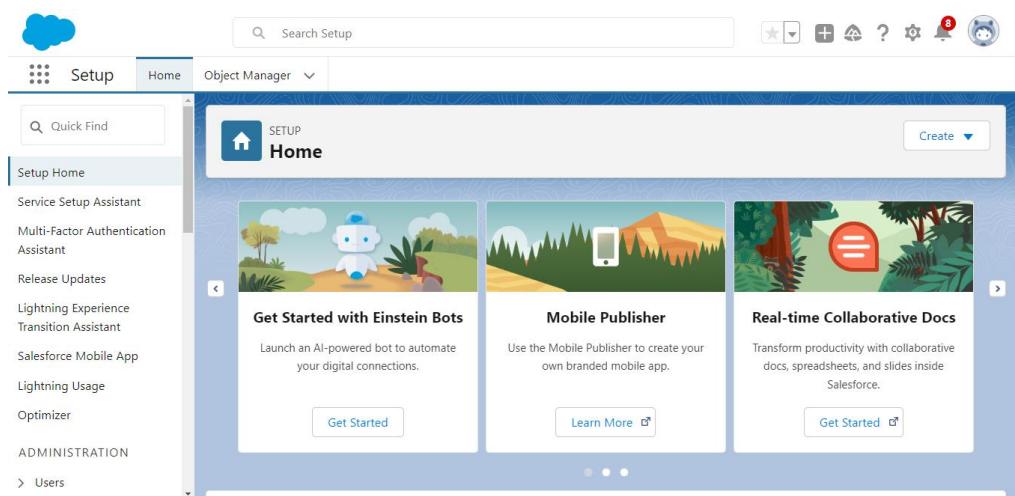


Click on Verify Account

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

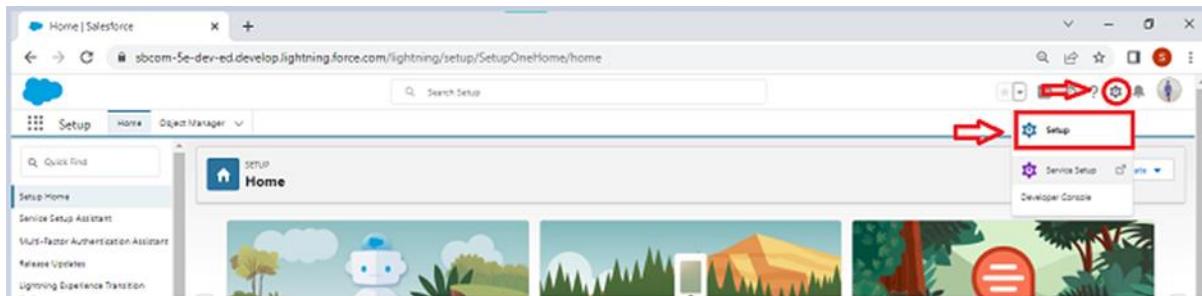
The screenshot shows the "Change Your Password" page. It includes fields for "New Password" and "Confirm New Password", both highlighted with a red box. Below these are "Security Question" and "Answer" fields, also highlighted with a red box. A large blue "Change Password" button at the bottom is also highlighted with a red box.

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



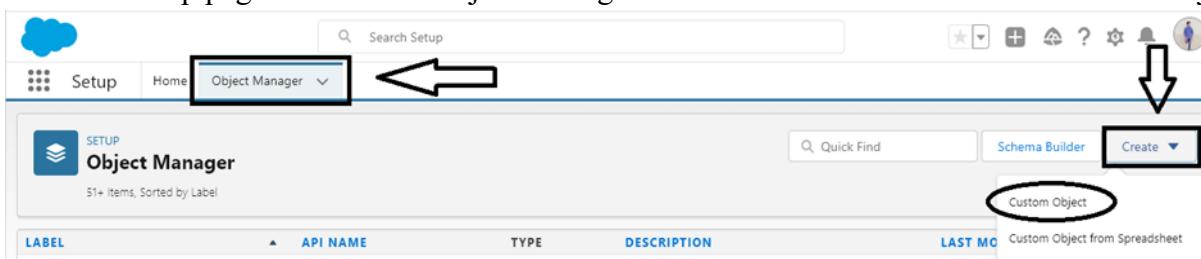
MILESTONE 2 - OBJECT

To Navigate to Setup page: Click on gear icon → click setup.



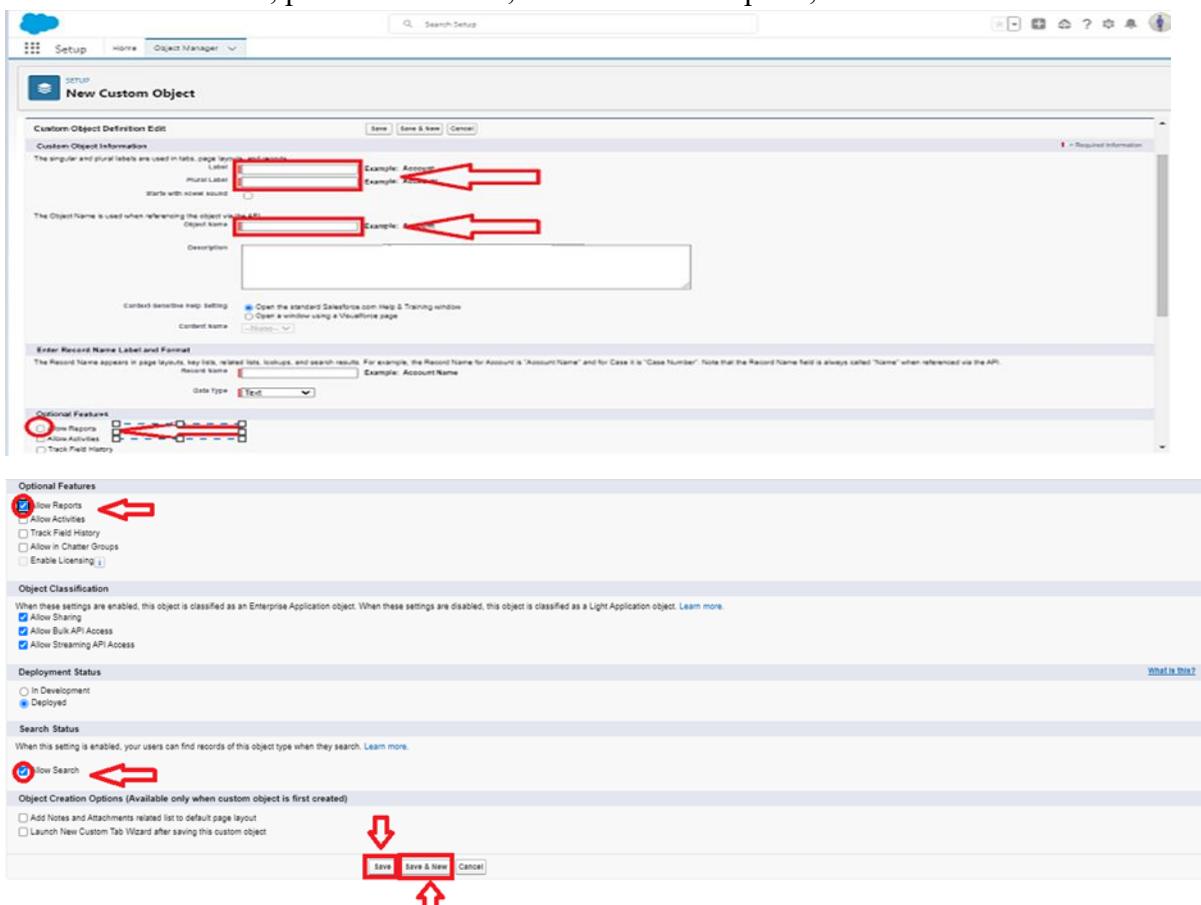
To create an object:

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.



Click on save.

MILESTONE 3 - TABS

To create a Tab:(supplier)

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

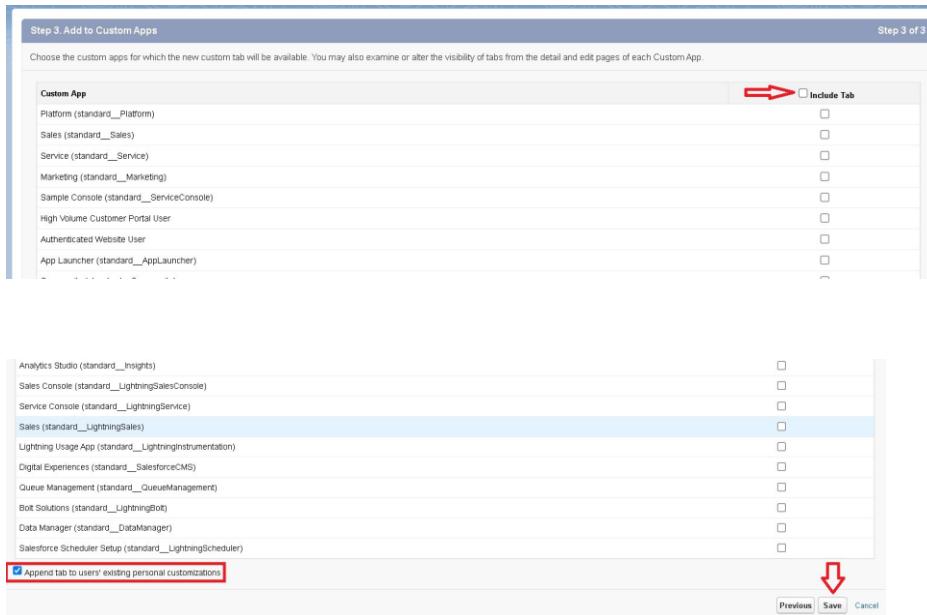
The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected in the navigation bar. In the main content area, there is a section titled 'Custom Object Tabs' with a 'New' button highlighted by a red arrow. Below this, a list of tabs is shown, each with a small icon, a label, and a brief description.

Object	Label	Tab Style	Description
Car : Del	Automobiles	Icon	Created to setup with student activity(Junction object)
Bill : Del	Bill	Icon	Alphabetic
Edm : Del	Companies	Icon	Visualforce
Edm : Del	Companies	Icon	Joined
Edm : Del	Companies	Icon	Anytime
Edm : Del	Companies	Icon	Phone
Edm : Del	Companies	Icon	Camera
Edm : Del	Companies	Icon	Desk
Edm : Del	Companies	Icon	Computer
Edm : Del	Companies	Icon	Highway Sign
Edm : Del	Companies	Icon	Highway Sign
Edm : Del	Companies	Icon	Anytime
Edm : Del	Companies	Icon	Lightning

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.

The screenshot shows the 'Edit Custom Object Tab' page for the 'suppliers' object. The 'Tab Label' is set to 'suppliers', 'Object' is 'supplier', and 'Tab Style' is 'Box'. The 'Description' field is empty. At the bottom, there are 'Save' and 'Cancel' buttons.

The screenshot shows the 'Tab Style Selector' interface. It displays a grid of icons and labels for various tab styles. A red box highlights the 'Box' icon under the 'Building Block' category. The interface also includes a 'Create your own style' button and a link to hide styles used on other tabs.



Activity 2: Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “ rice mill, **consumer** , rice details”.
2. Follow the same steps as mentioned in Activity -1 .

Activity 1: 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**.

Activity 2: 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.
3. Allow search → **Save**.

Activity 3: Create consumer Objects:

Note: Follow the same steps as mentioned in Activity 2

1. Use these display format for the **consumer**

- label name → **consumer**
- Plural label name → **consumers**
- Display Format → **consumers-{000}**
- Starting number → 1

Activity 4: Create rice details Objects:

2. Use these display format for the rice details

- label name → rice details
- Plural label name → rice details
- Display Format → **rice-{000}**
- Starting number → 1

MILESTONE 4 - THE LIGHTNING APP

Activity 1: 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.

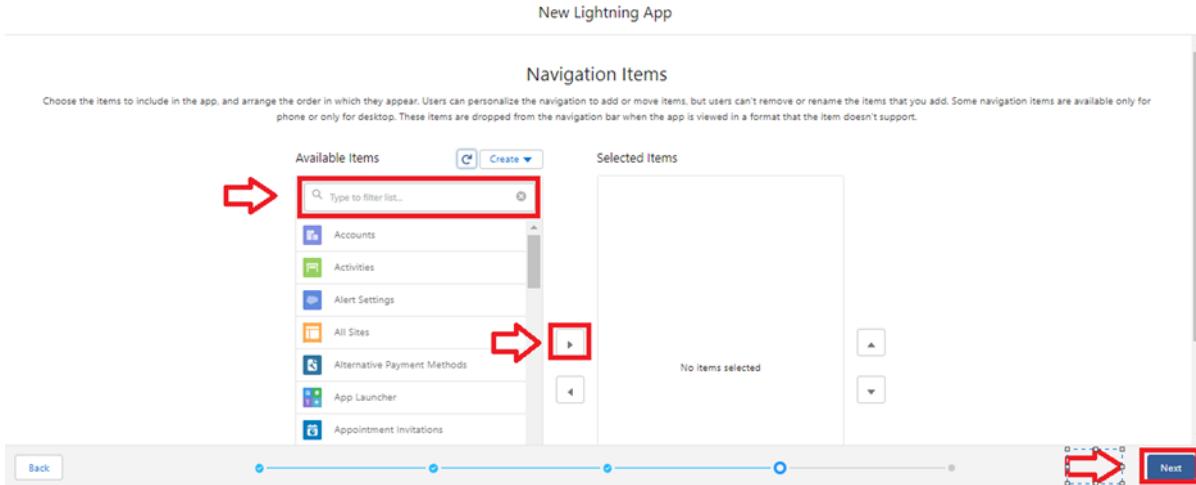
The screenshot shows the Salesforce App Manager interface. At the top, there are several tabs: 'App Manager' (highlighted with a red box), 'Home', 'Object Manager', and 'Setup'. Below these are three search bars: 'Q: App manager', 'u: Apps', and 'dev Manager'. A red arrow points to the 'New Lightning App' button at the top right of the main content area. The main content area displays a table of existing apps, with a red box highlighting the first row. The table has columns for 'App Name', 'Developer Name', 'Description', 'Last Modified', 'App Type', and 'V...'. The first row shows 'All Tabs' by 'AnilSet' with a 'Classic' type. At the bottom of the table, a note says 'Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the Winter 23 release notes.' A toggle switch for 'Enable App Cloning' is shown as 'Disabled'.

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.

The screenshot shows the 'New Lightning App' configuration page. The title is 'New Lightning App'. The first section is 'App Details & Branding' with the sub-section 'App Details'. It includes fields for 'App Name' (with a red box around it and the placeholder 'Name your app...'), 'Developer Name' (with a placeholder 'Enter a developer name...'), and 'Description' (with a placeholder 'Enter a description...'). To the right is the 'App Branding' section with fields for 'Image' (with a 'Upload' button), 'Primary Color Hex Value' (#007002), and 'Org Theme Options' (checkbox for 'Use the app's image and color instead of the org's custom theme'). Below this is the 'App Launcher Preview' section. At the bottom right is a 'Next' button with a red box around it.

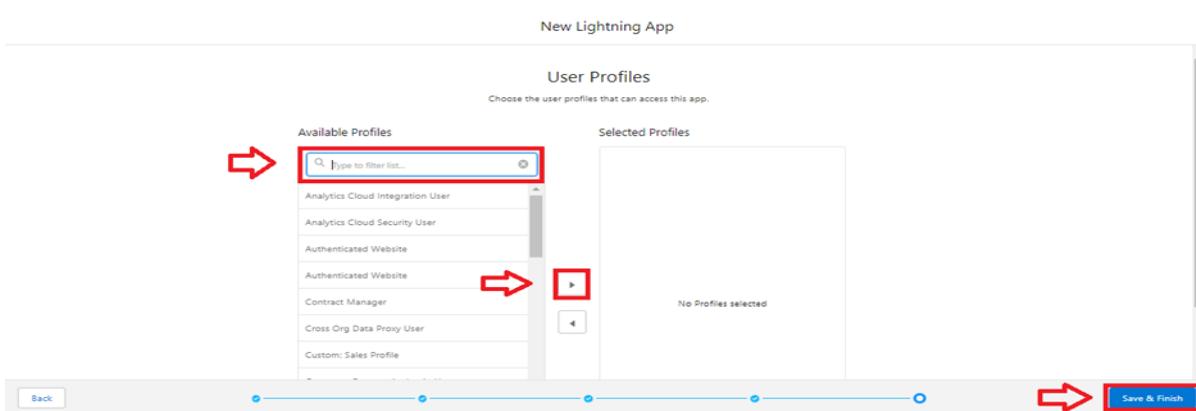
2. Upload a photo that is related to your app.

3. 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.

4. To Add User Profiles:



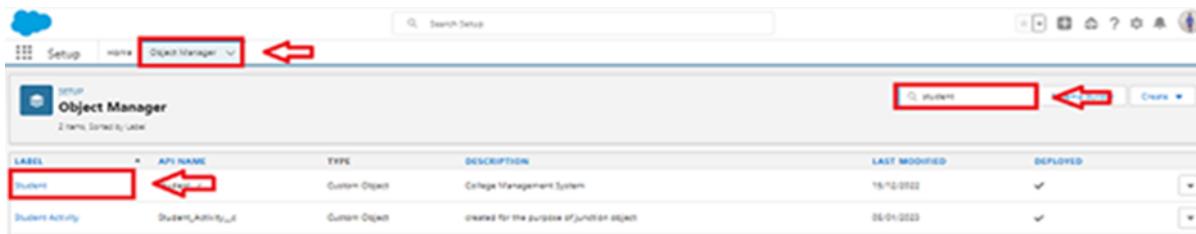
Search profiles (System administrator) in the search bar → click on the arrow button → save & finish.

MILESTONE 5 - FIELDS

Activity 1: 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.

Supplier

Fields & Relationships

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)		✓
Sum of Fuel supplied	Sum_of_Fuel_supplied_c	Roll-Up Summary (SUM Fuel details)		▼
supplier Name	Name	Text(50)		✓

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

Step 2. Enter the details

Field Label

Please enter the length of the number and the number of decimal places. For example, a number with a length of 6 and 2 decimal places can accept values up to "12345678.90".

Length Number of digits to the left of the decimal point

Decimal Places Number of digits to the right of the decimal point

Field Name

Description

Help Text

Required Always require a value in this field in order to save a record

Unique Do not allow duplicate values

External ID Set this field as the unique record identifier from an external system

AI Prediction Use this field to store AI prediction scores

Auto add to custom report type Add this field to existing custom report types that contain this entity

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

Activity 2 : Creating Junction Object

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

Creating junction object as rice details with supplier & rice mill

To create junction object

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

Object Manager

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Student	Student	Custom Object	College Management System	15/10/2022	✓
Student Activity	Student_Activity	Custom Object	created for the purpose of junction object	06/01/2023	✓

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

SETUP > OBJECT MANAGER
Supplier

Details
Fields & Relationships

Fields & Relationships
5 Items, 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)		✓
Sum of Fuel supplied	Sum_of_Fuel_supplied_c	Roll-Up Summary (SUM Fuel details)		✓
supplier Name	Name	Text(80)		✓

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Search Layouts
List View Button Layout
Restriction Rules

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

Specify the type of information that the custom field will contain.

Data Type

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll Up Summary ⓘ A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or “detail”) and another object (the parent, or “master”) where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
 The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
- External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

4. Select the related object “ supplier ” and click next.

Buyer
New Relationship

Step 2. Choose the related object

Select the other object to which this object is related

Related To:

Help for this Page ⓘ Step 2 of 6

Previous Next Cancel

Previous Next Cancel

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.

Activity 3 : Creating a Master-Detail Relationship

master-detail relationship is a type of relationship between two objects where the master object controls certain behaviors and settings of the detail object. Here are a few use cases that demonstrate the use of master-detail relationships

Creating Master-Detail Relationship between consumer & rice mill Object

To Create a Master-Detail relationship

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.

Activity 4 : Creating the Roll-up Summary

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. For example, you could use a rollup summary field to display the total value (amount of rice supplied) from rice details on a related supplier.

Creating the Roll-up summary field on supplier & rice mill Objects.

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

The screenshot shows the Salesforce Object Manager interface. A red box highlights the 'Object Manager' tab in the top navigation bar. Another red box highlights the search bar containing the text 'Student'. A third red box highlights the 'Label' column for the first object in the list, which is 'Student'. A fourth red box highlights the 'API NAME' column for the same object, which is 'Student__c'. The table lists two objects: 'Student' and 'Student_Activity'.

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

The screenshot shows the 'Fields & Relationships' section of the 'Student' object's setup page. A red box highlights the 'Fields & Relationships' link in the sidebar. Another red box highlights the 'New' button at the top right of the main grid. The grid lists various fields like 'Add No.', 'Age', 'Created By', etc., with their respective field names, data types, controlling fields, and indexing status.

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

The screenshot shows the 'Data Type' selection screen. A red box highlights the 'None Selected' radio button. Another red box highlights the 'Roll-Up Summary' radio button, which is selected. A third red box highlights the 'Next' button at the bottom right. The page asks for the type of information the custom field will contain.

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

seller
New Custom Field

Help for this Page

Step 2. Enter the details

Step 2 of 5

Previous Next Cancel

Field Label	sum of rice distributed
Field Name	sum_of_rice_distributed
Description	the total amount of rice distributed to customer or shopowner
Help Text	

Auto add to custom report type Add this field to existing custom report types that contain this entity

Previous Next Cancel

- 5.
6. Select the summarized object as “rice details”.
7. Select the Rollup type as “sum”.
8. Select the field to aggregate as “rice distributed”, and click Next → Next → Save.

Step 3. Define the summary calculation

Step 3 of 5

Previous Next Cancel

Select Object to Summarize

Master Object: seller
Summarized Object: rice details

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate: rice distributed

Filter Criteria

All records should be included in the calculation
 Only records meeting certain criteria should be included in the calculation

Previous Next Cancel

9. Follow the same steps for the rice mill Object from 1 to 3
10. Give the Field label as “rice distributed to shops”, Field Name will be Auto generated, and click Next.
11. Select the summarized object as “rice details”.
12. Select the Rollup type as “sum”.
13. Select the field to aggregate as “rice distributed”, and click Next → Next → Save.
14. **Note :** create the field as “rice taken by shops in kgs” using number datatype in consumer object
15. Follow the same steps for the rice mill Object from 1 to 3
16. Give the Field label as “rice taken”, Field Name will be Auto generated, and click Next.
17. Select the summarized object as “consumer”.
18. Select the Rollup type as “sum”.
19. Select the field to aggregate as “rice taken in shops”, and click Next → Next → Save.

Activity 5 : Creating Fields in Objects

Creating the number field in rice details object

6. Go to the setup page → click on object manager → From drop down click edit for rice details object.
7. Click on fields & relationship → click on New.

SETUP > OBJECT MANAGER
Supplier

Details
Fields & Relationships

Fields & Relationships
5 Items, 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)		✓
Sum of Fuel supplied	Sum_of_Fuel_supplied_c	Roll-Up Summary (SUM Fuel details)		▼
supplier Name	Name	Text(50)		✓

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List View Button Layout
Restriction Rules

8. Select Data type as “Number” and click Next.
9. Given the Field Label as “ supplier name ” and length as “ 5 ”.

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label i

Please enter the length of the number and the number of decimal places. For example, a number with a length of 6 and 2 decimal places can accept values up to "12345678.90".

Length Number of digits to the left of the decimal point

Decimal Places Number of digits to the right of the decimal point

Field Name i

Description

Help Text i

Required Always require a value in this field in order to save a record

Unique Do not allow duplicate values

External ID Set this field as the unique record identifier from an external system

AI Prediction Use this field to store AI prediction scores

Auto add to custom report type Add this field to existing custom report types that contain this entity i

10. Field Name will be auto populated, and click on Next→ Next → Save.

Activity 6: Creating Fields in rice mill Objects

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

Activity 7: Creating Fields in consumer Objects

S.no	Object name	Fields	data type				
1.	consumer	<table border="1"> <tr> <td>First name</td> <td>Text</td> </tr> <tr> <td>Last name</td> <td>Text</td> </tr> </table>	First name	Text	Last name	Text	
First name	Text						
Last name	Text						

	Phone number	phone
	email	email
	Rice taken by shops	Number (length=5)
	Rice type	(Picklist values) 1.basmati 2.normal rice
	Mode of payment	Picklist values <ul style="list-style-type: none"> ● Credit card ● Debit card ● Net banking ● UPI ● Cash

Activity 8 : 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.

Step 2. Choose output type

Step 2 of 5

Previous Next Cancel

Field Label Field Name

Auto add to custom report type Add this field to existing custom report types that contain this entity [\[?\]](#)

Formula Return Type

None Selected Select one of the data types below.

Checkbox Calculate a boolean value.
Example: `[TODAY() > CloseDate]`

Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `(Gross Margin = Amount - Cost__c)`

Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `[Reminder Date = CloseDate - 7]`

Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `[New = NOW() + 1]`

Number Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius__c + 32`

Percent Calculate a percent and automatically add the percent sign to the number.
Example: `[Discount = (Amount - Discounted_Amount__c) / Amount]`

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.

The screenshot shows the "Advanced Formula" tab selected in the top navigation bar. The formula entered is:

```
amount paid (Number) =
rice_taken_by_shops_c * rice_mill_name_r.rice_price_kg_c
```

On the right, a "Functions" dropdown menu is open, showing various mathematical and logical functions like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. A button "Insert Selected Function" is also visible. At the bottom of the editor, a status bar displays "Check Syntax" followed by a green message: "No syntax errors in merge fields or functions. (Compiled size: 67 characters)".

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.

The screenshot shows the "Advanced Formula" tab selected. The formula entered is:

```
customer name (Text) =
First_Name_c + ' ' + Last_Name_c
```

On the right, a "Functions" dropdown menu is open, showing various functions like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. A button "Insert Selected Function" is also visible. At the bottom of the editor, a status bar displays "Check Syntax" followed by a green message: "No syntax errors in merge fields or functions. (Compiled size: 35 characters)".

8.

Activity 9 : Creating the validation rule

Creating the validation rule for phone number field in consumer object

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 the setup page → click on object manager → From drop down click edit for consumer object.
2. Click on the validation rule → click New.

SETUP > OBJECT MANAGER
consumer

Validation Rules
1 items, Sorted by Rule Name

Rule Name	Error Location	Error Message	Active	Modified By
phonenumeroremailblankrule	Top of Page	please fill phone number	✓	udayrishi yelagandula, 05/07/2023, 12:57 pm

Details

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- List View Button Layout
- Restriction Rules

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.

The save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Save | Save & New | Cancel

Rule Name: phonenumeroremailblankrule

Active:

Description: phone number and email should not be blank

Quick Tips

- Operators & Functions

Error Condition Formula

Example: Discount_Percent_c>30 | More Examples..

Display an error if Discount is more than 30%

If this formula expression is true, display the text defined in the Error Message area

Insert Field | **Insert Operator** ▾

OR(ISBLANK(phone_number_c), ISBLANK(email_c))

Functions

– All Function Categories – ▾

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function

ABS(number)
Returns the absolute value of a number, a number without its sign

Help on this function

Check Syntax No errors found

- 6.
7. Under the error message write as “please fill in your phone number.”
8. Select error location “top of page”.

Insert Field | **Insert Operator** ▾

OR(ISBLANK(phone_number_c), ISBLANK(email_c))

Functions

AUCS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

ABS(number)
Returns the absolute value of a number, a number without its sign

Help on this function

Check Syntax

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message: please fill phone number

This error message can either appear at the top of the page or below a specific field on the page

Error Location: Top of Page Field 

Save | Save & New | Cancel

- 9.
10. Save the validation rule.

MILESTONE 6 - PAGE LAYOUTS

Activity 1 : 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.

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

- Page: SETUP > OBJECT MANAGER
- Object: consumer
- Section: Page Layouts
- Table Headers: PAGE LAYOUT NAME, CREATED BY, MODIFIED BY
- Items:
 - customer Layout: created by udayrushi yelagandula, 04/07/2023, 11:43 am
 - personal details: created by udayrushi yelagandula, 10/07/2023, 10:39 am
- Buttons: Quick Find, New, Page Layout Assignment

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

The dialog shows the following fields:

- Existing Page Layout: custom page
- Page Layout Name: customer layout (highlighted with a red box)
- Buttons: Save (highlighted with a red arrow), Cancel

4. Drag and drop the section field to consumer details and create the section.

5. Enter the section name as “Personal details”, → click Ok.

The dialog shows the following settings:

- Section Name: personal details (highlighted with a red box)
- Display Section Header On:
 - Detail Page (checked)
 - Edit Page (checked)
- Layout:
 - 1-Column (radio button)
 - 2-Column (radio button, highlighted with a red circle)
- Tab-key Order:
 - Left-Right (radio button, highlighted with a red circle)
 - Top-Down (radio button)
- Buttons: OK (highlighted with a red arrow), Cancel

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.

The screenshot shows the Salesforce Layout Editor interface. At the top, there are buttons for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. On the left, a sidebar titled 'Fields' lists various options like Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. The main area displays a 'Quick Find' field with the placeholder 'Field Name'. Below it is a table with columns for 'Section' and 'Field Name'. The table contains the following data:

Section	Field Name
customer Name	last name
email	rice taken by shops
amount paid	mode of payments
first name	rice type
phone number	rice mill name
Created By	Last Modified By

Below this, there are three sections of visualforce code:

- product info**: Contains fields for rice type (Sample Text) and rice taken by shops (47.917).
- personal details**: Contains fields for first name (Sample Text), last name (Sample Text), customer Name (GEN-2004-001234), phone number (1-415-555-1212), email (sarah.sample@company.com), and rice mill name (Sample Text). The customer Name field has a warning icon.
- receipt details**: Contains fields for mode of payments (Sample Text) and amount paid (313.59). The amount paid field has a warning icon.

At the bottom left, the number '11.' is visible.

MILESTONE 7 - PROFILES

Activity 1: 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.

The screenshot shows the Salesforce Setup - Profiles page. At the top, there is a 'SETUP' button and a 'Profiles' tab. Below the tabs, there is a note about permissions and record types. A list of standard profiles is shown, with 'Custom Profile' checked for the 'owner' profile. The 'Profile Detail' section shows the profile's name, user license (Salesforce), and creation information (Created By: udayrushi.yelagandula, 10/07/2023, 10:56 am). The 'Page Layouts' section lists various object layouts and their corresponding global layouts. The 'Standard Object Layouts' table includes rows for Global, Email Application, Home Page Layout, Account, Alternative Payment Method, and Appointment Invitation. The 'Object Milestone' column lists Global Layout, Not Assigned, DE Default, Account Layout, Alternative Payment Method Layout, and Appointment Invitation Layout respectively. The 'Object' column lists Opportunity, Opportunity Product, Order, and Order Product. The 'Layout' column lists Object Milestone Layout, Operating Hours Layout, Opportunity Layout, Opportunity Product Layout, Order Layout, and Order Product Layout. The 'Assignment' column lists [View Assignment] for all rows.

At the bottom left, the number '2.' is visible.

3. 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.

Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
consumers	✓	✓	✓	✓	✓	✓
rice details	✓	✓	✓	✓	✓	✓
rice mills	✓	✓	✓	✓	✓	✓
supplier	✓	✓	✓	✓	✓	✓

4.

5. Give access and save it.

Activity 2: 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.

Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
consumers	✓	□	□	□	□	□
rice details	✓	□	□	□	□	□
rice mills	✓	□	□	□	□	□
supplier	✓	□	✓	□	□	□

5. And click save.

Activity 3: 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.

Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
consumers	✓	✓	□	□	□	□
rice details	✓	✓	□	□	□	□
rice mills	✓	□	□	□	□	□
supplier	✓	□	□	□	□	□

5. And click save.

MILESTONE 8 - ROLE & ROLE HIERARCHY

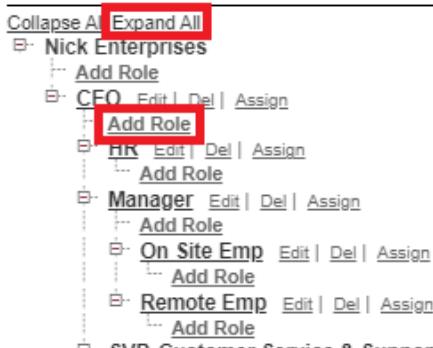
Activity 1: Creating owner Role

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.

Your Organization's Role Hierarchy



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

Click and save it.

Activity 2: 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.

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

- smartbridge
 - CEO** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - CFO** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - COO** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - HR** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - owner** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - SVP_Customer_Service & Support** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - SVP_Human_Resources** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - SVP_Sales & Marketing** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**

- 3.
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

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

- smartbridge
 - CEO** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - CFO** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - COO** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - HR** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - owner** [Edit](#) | [Del](#) | [Assign](#)
 - employer** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - SVP_Customer_Service & Support** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - SVP_Human_Resources** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - SVP_Sales & Marketing** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**

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

MILESTONE 9 – USERS

Activity 1: 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.

Save it.

Activity 2: creating another users

12. Go to setup → type users in quick find box → select users → click New user.

13. Fill in the fields

- 14. First Name : ram
- 15. Last Name : ram
- 16. Alias : Give a Alias Name
- 17. Email id : Give your Personal Email id
- 18. Username : Username should be in this form: text@text.text
- 19. Nick Name : Give a Nickname
- 20. Role : employer
- 21. User license : Salesforce platform
- 22. Profiles : standard platform user.

23. Go to setup → type users in quick find box → select users → click New user.

24. Fill in the fields

- 25. First Name : ragu
- 26. Last Name : raj
- 27. Alias : Give a Alias Name
- 28. Email id : Give your Personal Email id
- 29. Username : Username should be in this form: text@text.text
- 30. Nick Name : Give a Nickname
- 31. Role : worker
- 32. User license : Salesforce platform
- 33. Profiles : standard platform user.

User Edit
ragu raj

User Edit Save Save & New Cancel

General Information

First Name	ragu
Last Name	raj
Alias	rraj
Email	ramesh0820@gmail.com
Username	ramesh0820@73690gmail.i
Nickname	raj
Title	
Company	
Department	
Division	

Role	worker
User License	Salesforce Platform
Profile	Standard Platform User
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Data.com User Type	None
Data.com Monthly Addition Limit	300

MILESTONE 10 - PERMISSION SETS

Activity 1: Creating OWD setting.

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

Q sharing

SETUP Sharing Settings

Sharing Settings

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

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>

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.

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

MILESTONE 11 - REPORTS

Activity 1: Create Report

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.
 - a. 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.

Activity 2: Sharing report to owner

1. Click edit drop down and select subscribe option

Report: rice mills with consumers range of amount per day					
	rice taken by shops	consumer: consumer name	rice type	rice price/kg	mode of payments
<input type="checkbox"/> 8 (1)	A-0003	normal rice	50	Cash	400.00
Subtotal			50		400.00
<input type="checkbox"/> 10 (1)	A-0006	basmati	50	Cash	500.00
Subtotal			50		500.00
<input type="checkbox"/> 12 (1)	A-0007	basmati	50	Cash	600.00
Subtotal			50		600.00
<input type="checkbox"/> 15 (1)	A-0008	basmati	50	Cash	750.00
Subtotal			50		750.00
<input type="checkbox"/> 16 (1)	A-0010	normal rice	50	Cash	800.00
Subtotal			50		800.00
<input type="checkbox"/> 18 (1)	A-0009	normal rice	50	Cash	900.00
Subtotal			50		900.00
<input type="checkbox"/> 80 (1)	A-0011	basmati	50	Net banking	4,000.00
Subtotal			50		4,000.00
Total (11)			50		9,050.00

3. Follow as per below image.

Edit Subscription

Settings

Frequency

Daily Weekly Monthly

Time

8:00 am ▾

Attachment

Attach File

Recipients

Send email to

Me

Edit Recipients

Run Report As

Me

Another Person

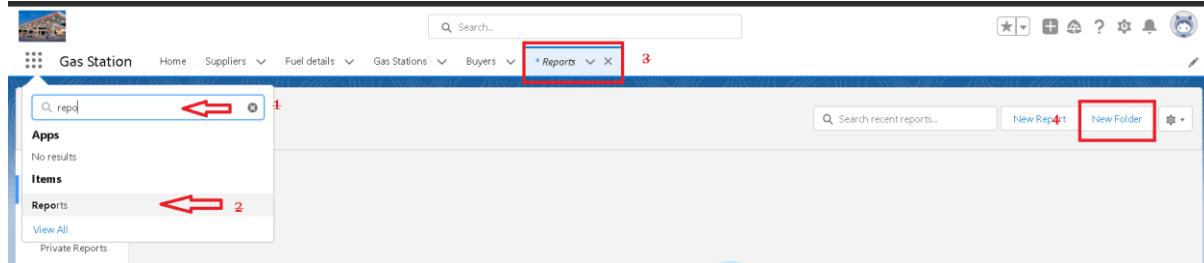
Cancel Save

- After selecting the run report as a “another person” select your personal account or whom you want to send that mail to.
- Click save.

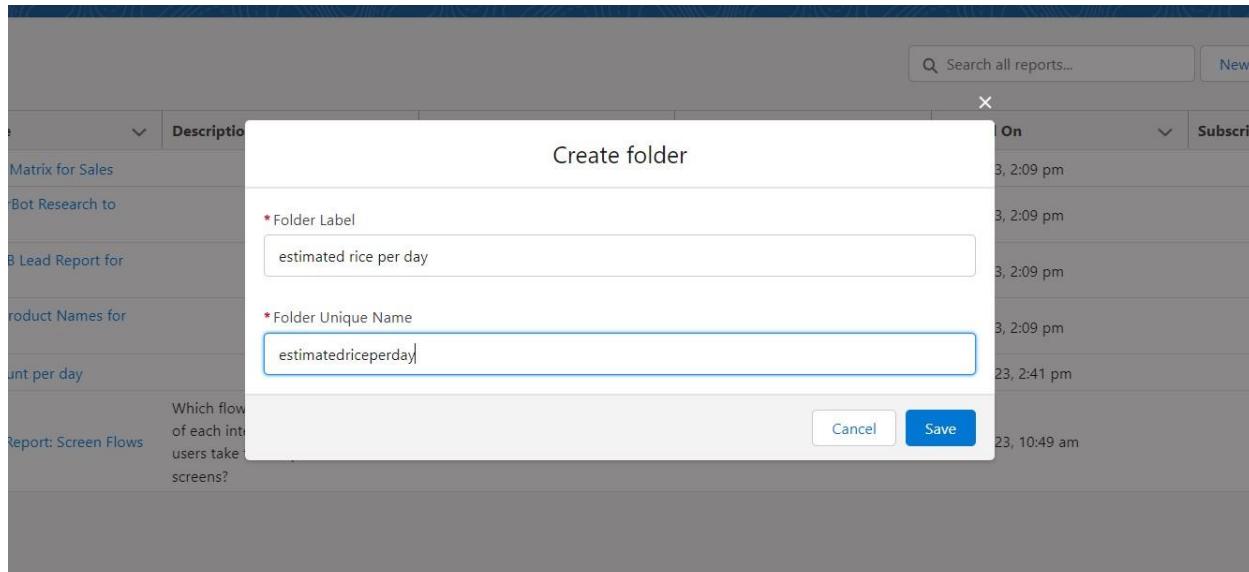
NOTE: The owner gets daily email notification of that rice mill report.so that he can see all data remotely.

Activity 3: create a report folder

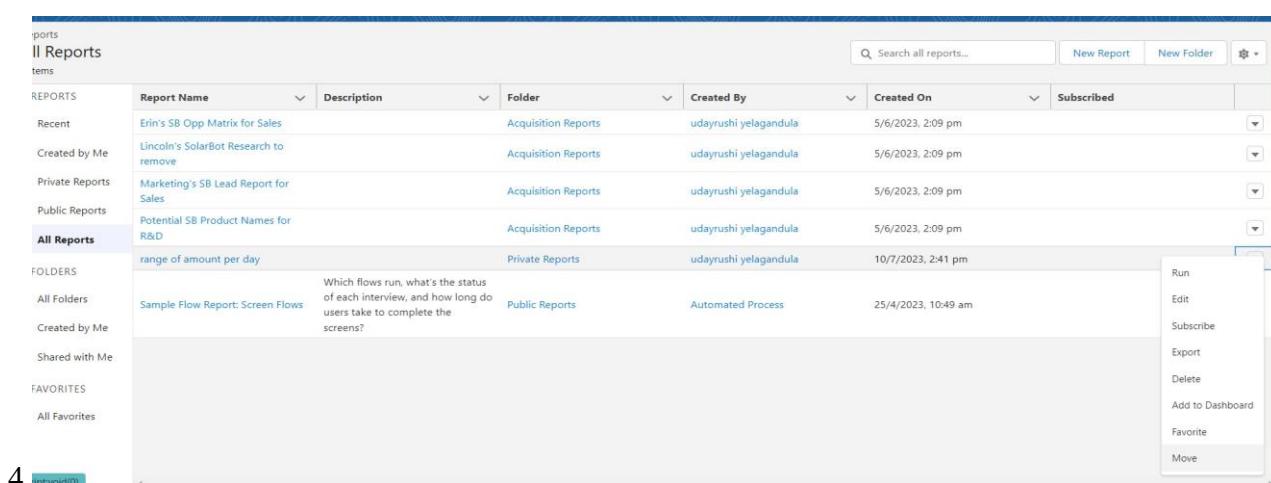
- Click on the app launcher and search for reports.
- Double click on the report, “reports tab” will be auto populated in the navigation bar.
- Click on the report tab, click on the new folder.



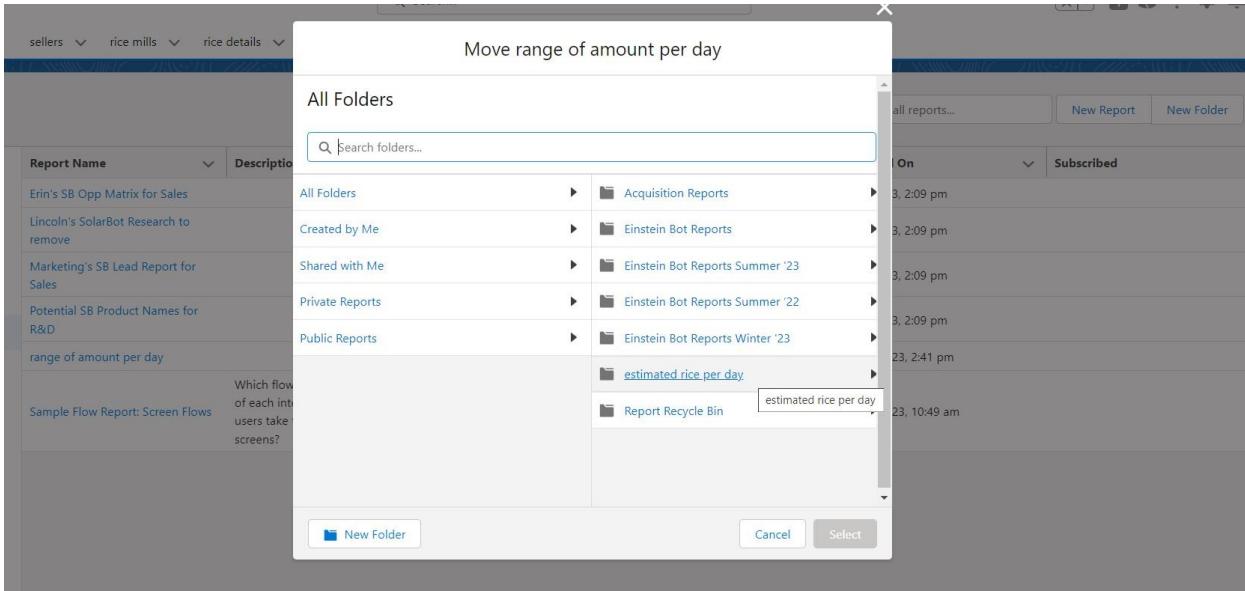
- Give the Folder label as “estimated rice per day”, Folder unique name will be auto populated.
- Click save.



- navigate to app launcher and click reports on that.
- click all reports.
- Select the range of amount per day drop down in that click move.



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

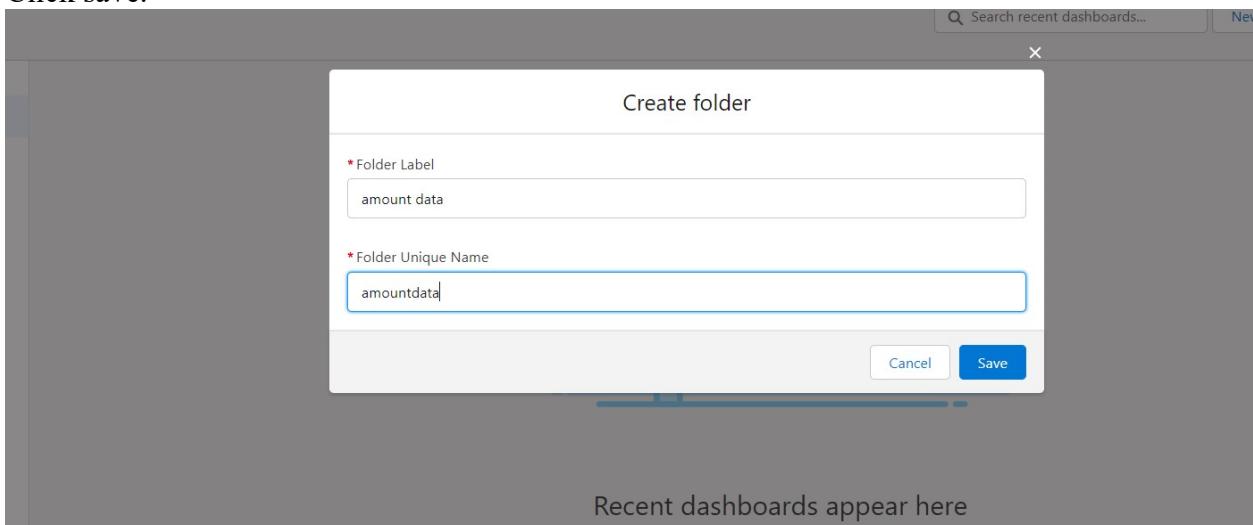


Note: if you want to see the report which you have created then go to reports - all folders - estimated rice per day - your report will appear in this way.

MILESTONE 12 - DASHBOARDS

Activity 1: Create Dashboard Folder

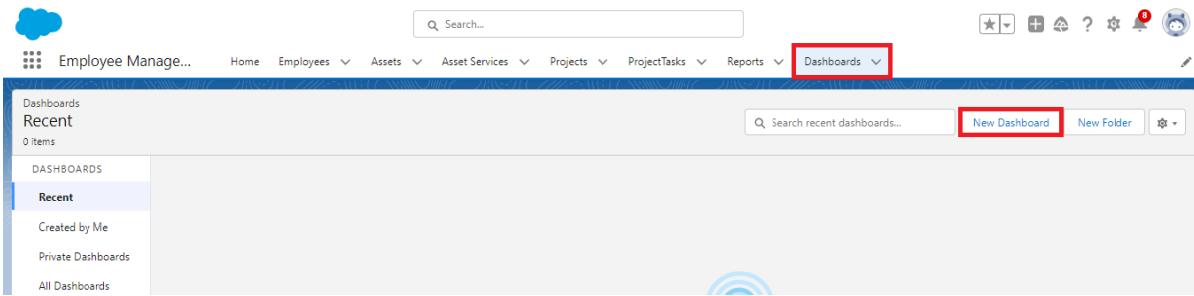
1. Click on the app launcher and search for the dashboard.
2. Click on the dashboard tab.
3. Click the new folder, give the folder label as “ amount data dashboard”.
4. Folder unique names will be auto populated.
5. Click save.



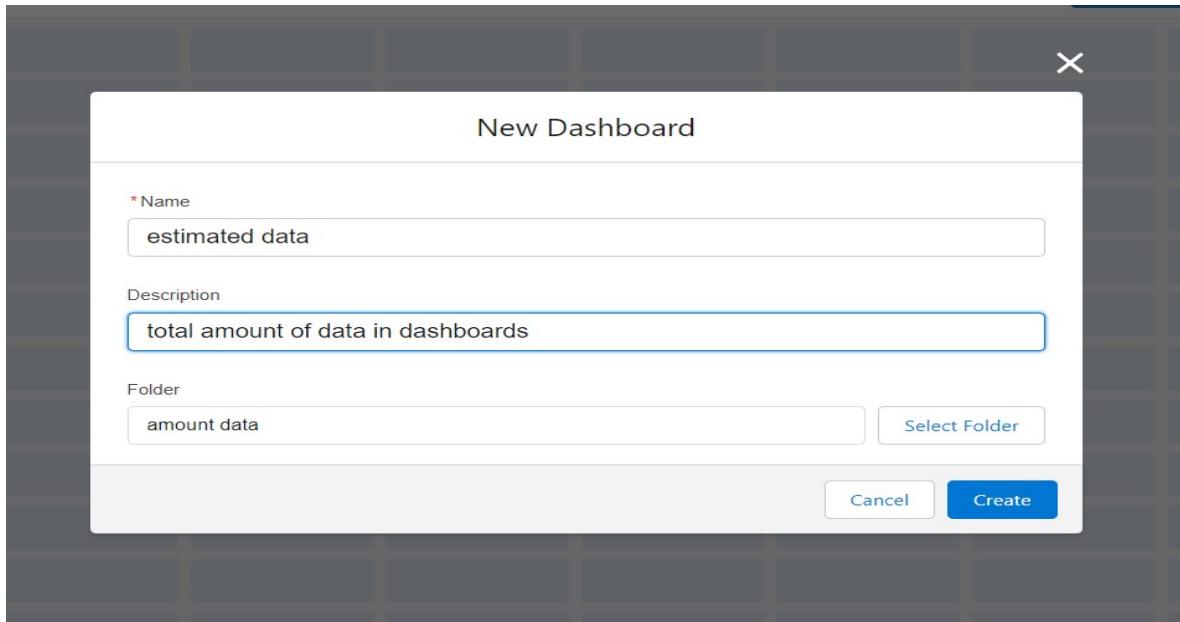
6. Recent dashboards appear here

Activity 2: Create Dashboard

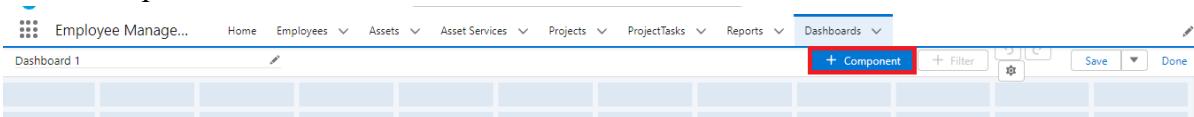
1. Go to the app → click on the Dashboards tabs.



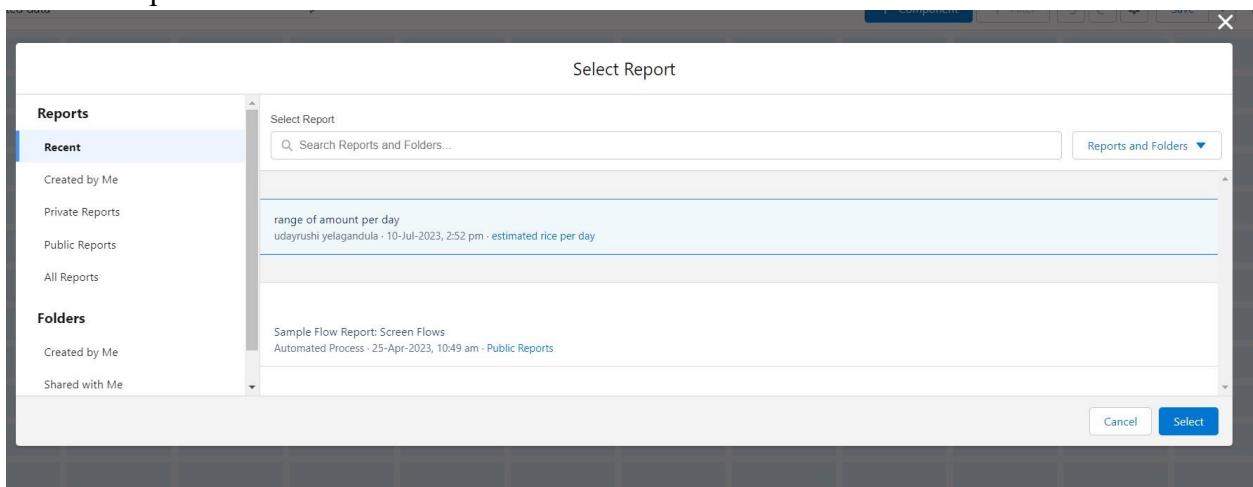
2. Give a Name and select the folder that was created, and click on create.



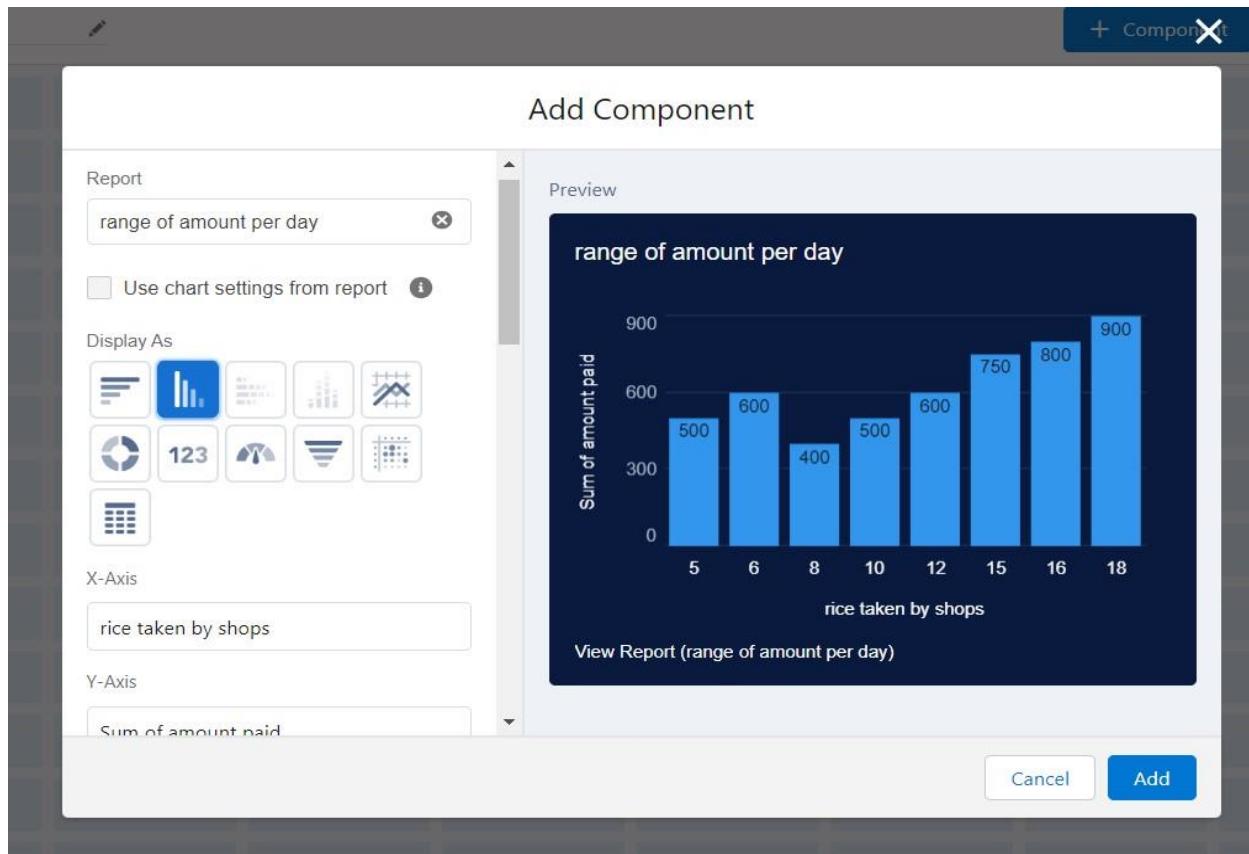
Select add component.



Select a Report and click on select.



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

Value

Sliced By

Display Units

Show Values
 Show Percentages
 Combine Small Groups into "Others"
 Show Total

Decimal Places

Out of Date

Click add.

Click save and done.

+ Component X

Add Component

Report

Use chart settings from report

Display As

Value

Sliced By

Preview

range of amount per day

View Report (range of amount per day)

Cancel Add