A CRM APPLICATION FOR WHOLESALE RICE MILL

By

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Project Abstract

Introduction:

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

Objective:

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

Key Features:

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

Conclusion:

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

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INTRODUCTION

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

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

The CRM application focuses on several key areas:

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

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

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

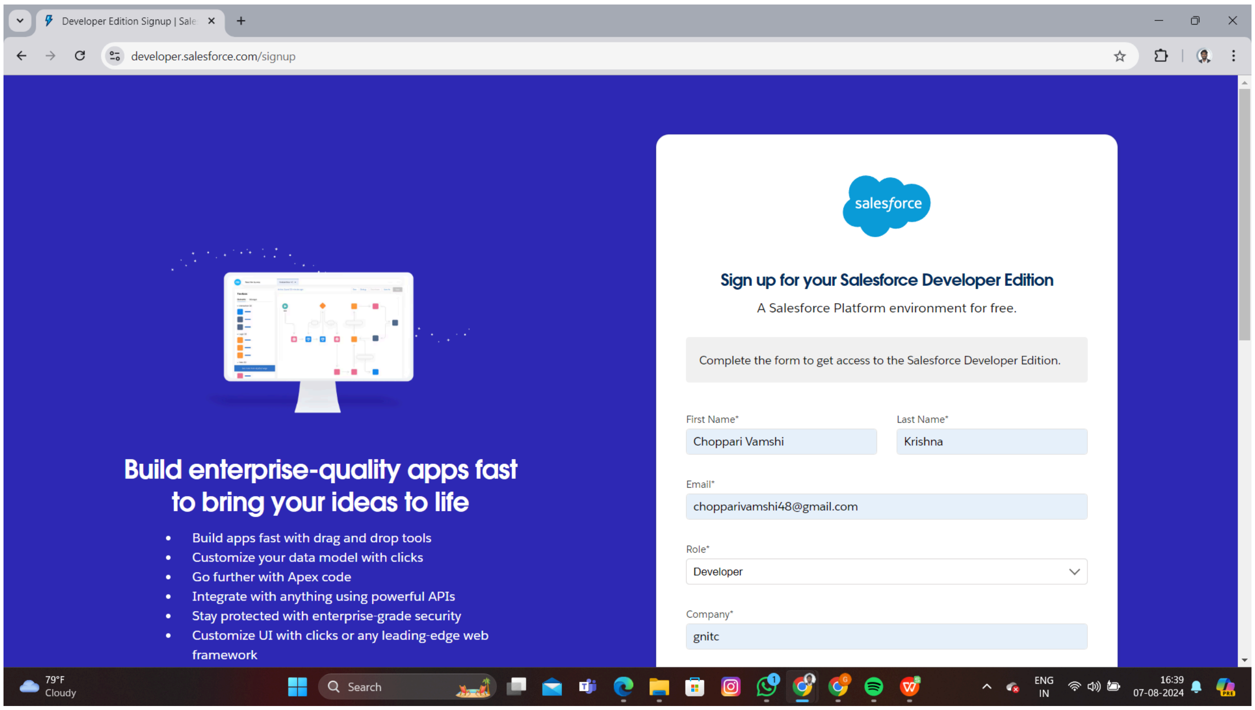
4. Payment Processing: Accurate tracking of payments is crucial for financial health. The application records all payment details, ensuring timely and accurate financial reconciliation and facilitating smooth financial operations.

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

Task 1:

Creating Developer Account

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



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

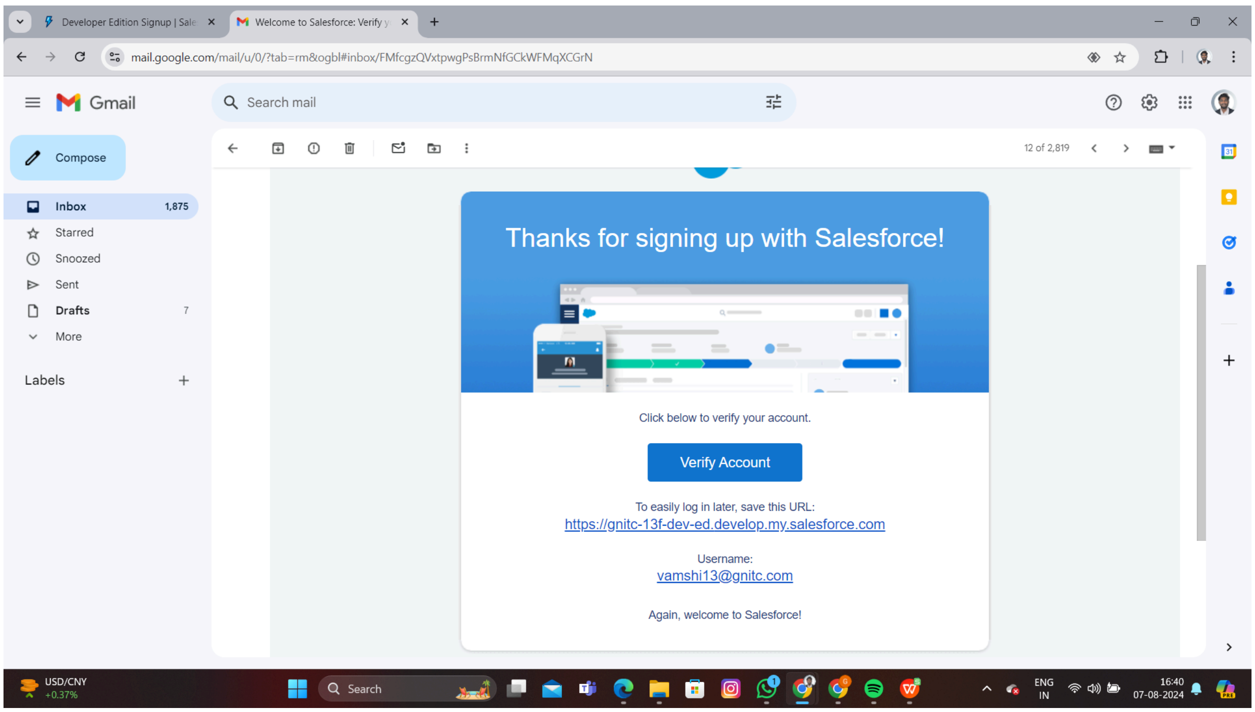
This need not be an actual email id, you can give anything in the format : username@organization.com

Click on sign me up after filling these.

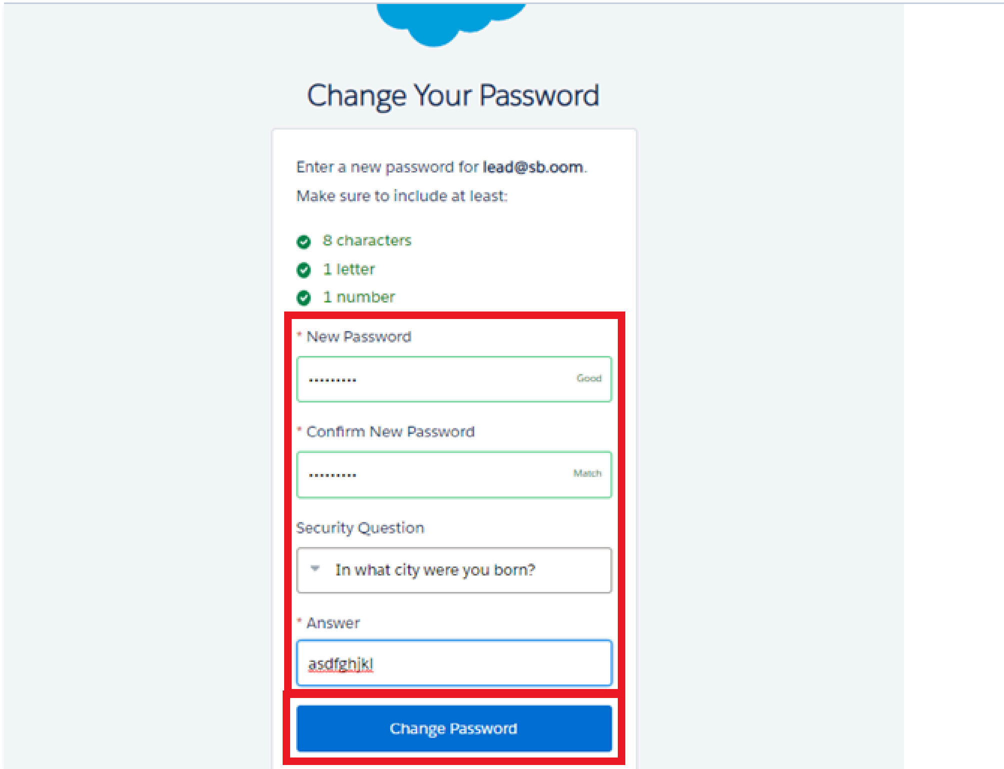
Task 2:

Account Activation

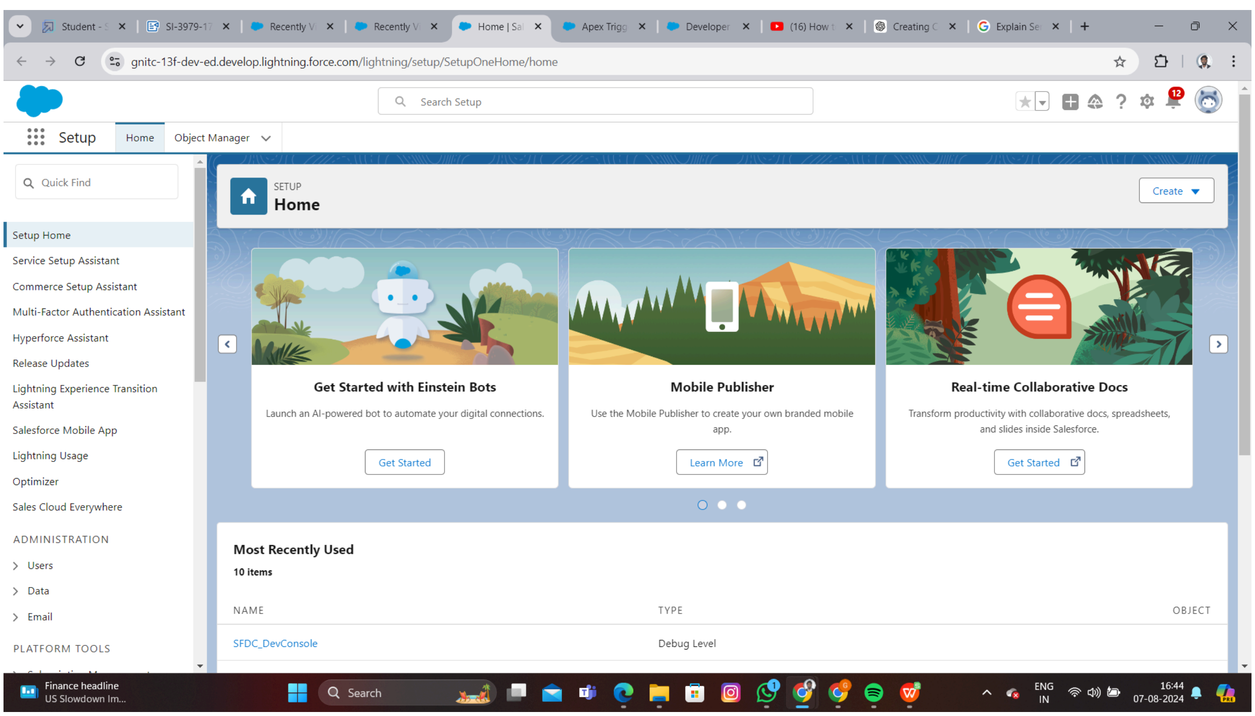
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



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



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

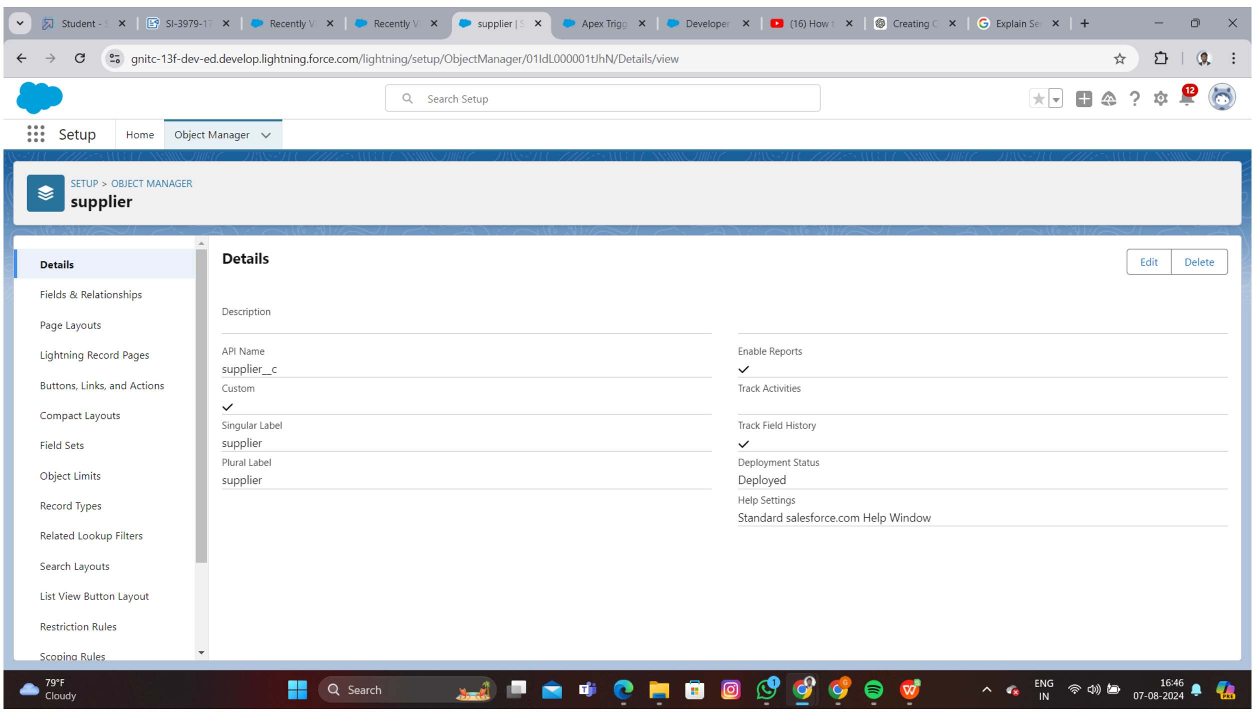


Task 3:

Create Supplier Object

To create an object:

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

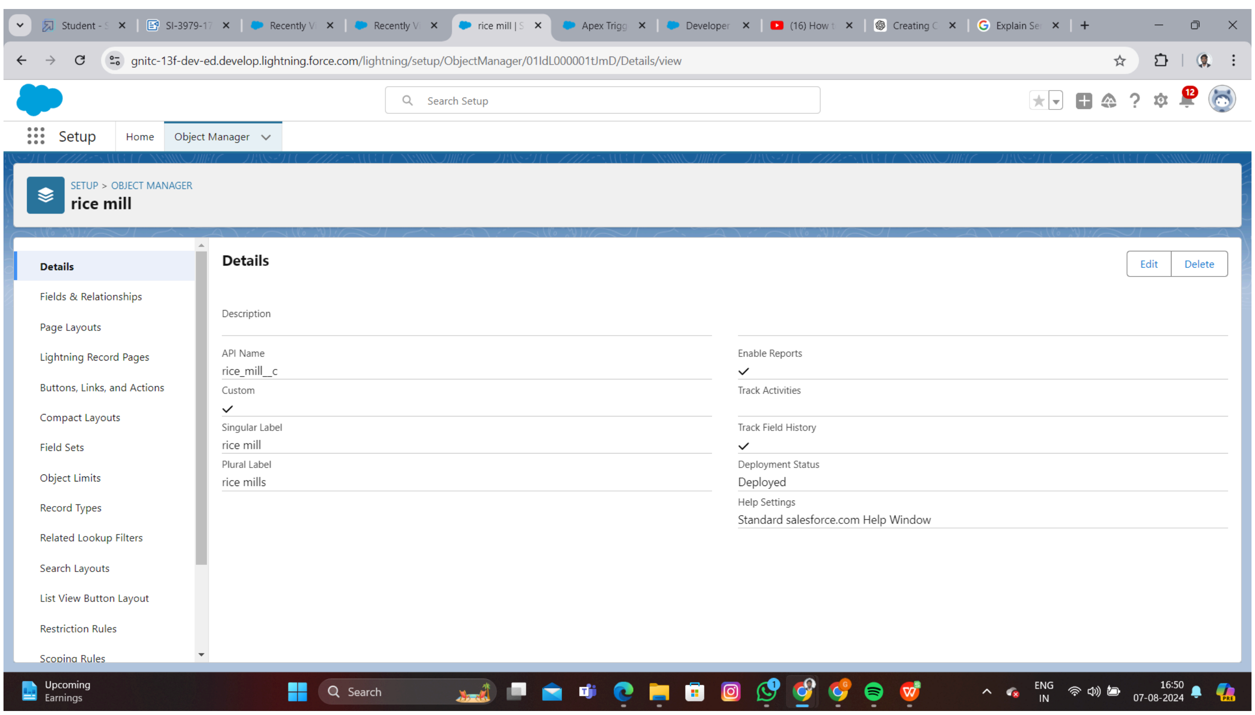


Task 4:

Create Rice mill Object

To create an object:

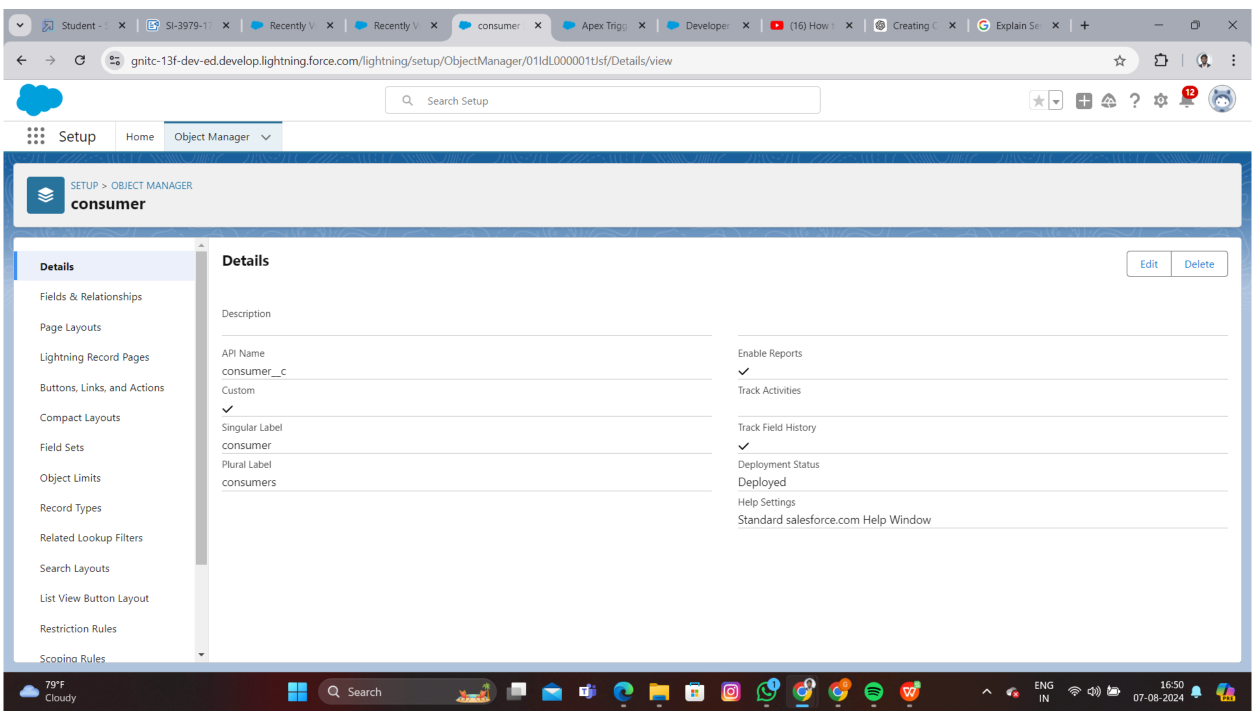
1. From the setup page >> Click on Object Manager>>Click on Create >> Click on Custom Object.
1. Enter the label name>>rice mill
2. Plural label name>> rice mills
3. Enter Record Name Label and Format
    - Record Name >>
    - Data Type >> Auto Number
    - Display Format >> rice-{000}
    - Starting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



Task 5:

Create consumer Objects

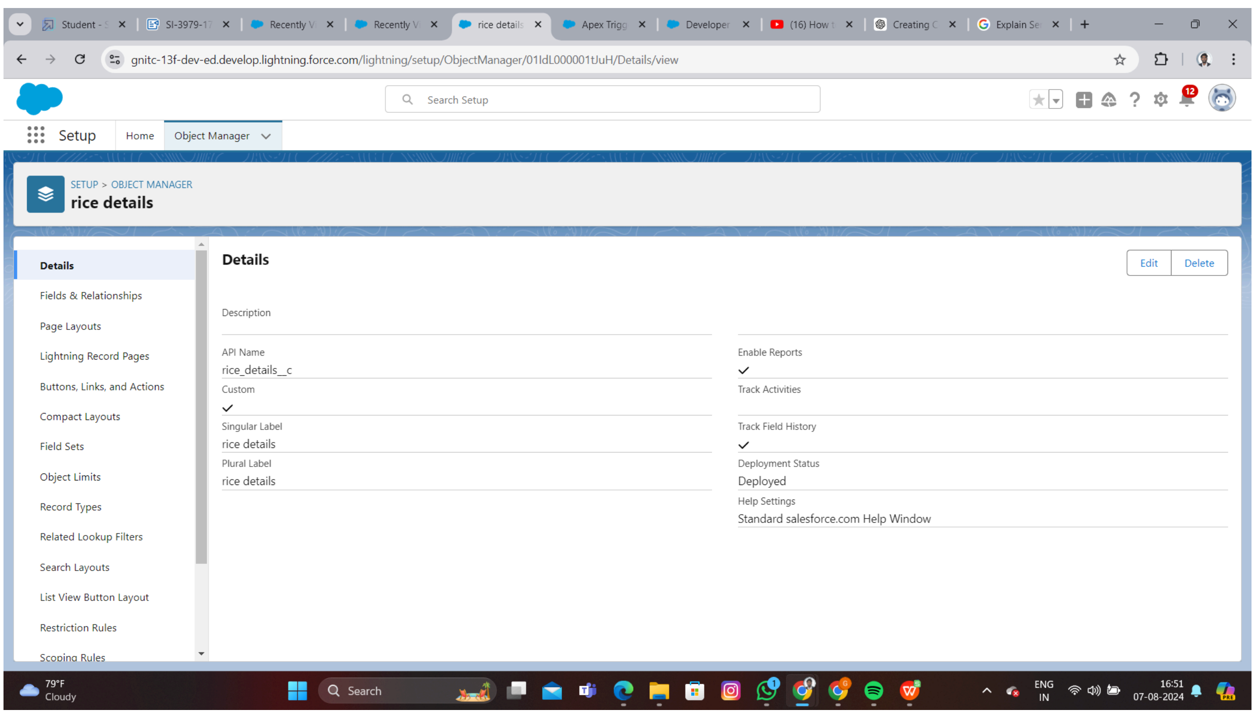
1. From the setup page >> Click on Object Manager>>Click on Create >> Click on Custom Object.
1. Enter the label name>>consumer
2. Plural label name>> consumers
3. Enter Record Name Label and Format
    - Record Name >>
    - Data Type >> Auto Number
    - Display Format >> consumers-{000}
    - Starting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



Task 6:

Create rice details Objects

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

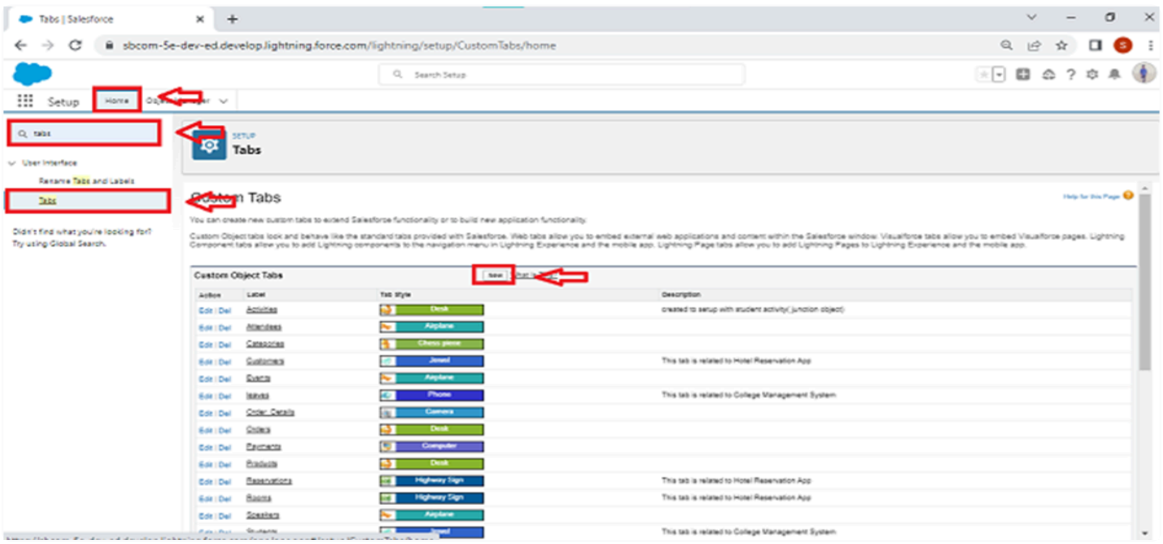


Task 7:

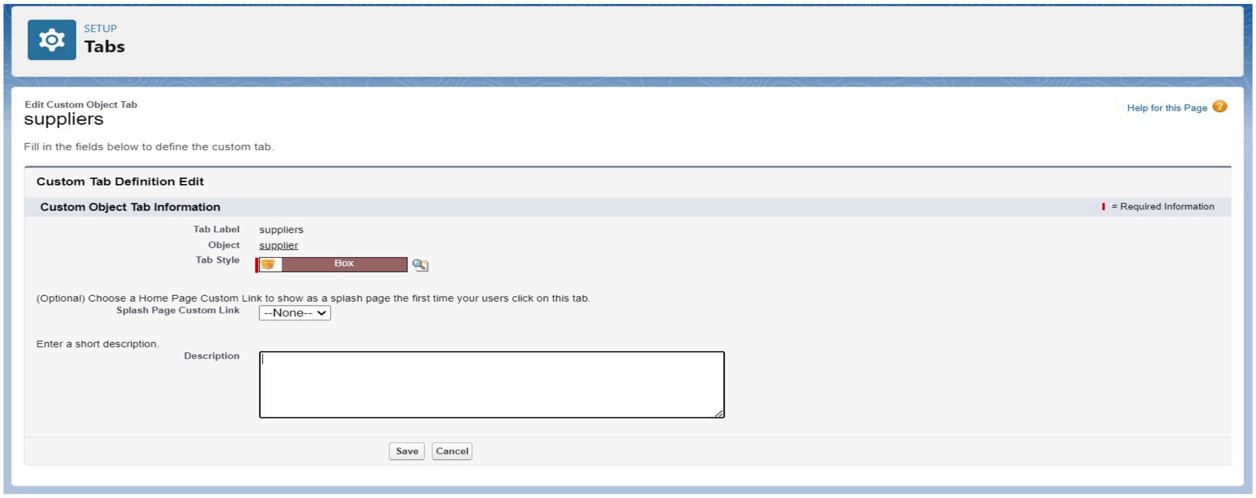
Creating a Custom Tab

To create a Tab:(supplier)

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



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


SETUP
Tabs
Edit Custom Object Tab
suppliers
Help for this Page
Fill in the fields below to define the custom tab.
Custom Tab Definition Edit
Custom Object Tab Information
= Required Information
Tab Label suppliers
Object supplier
Tab Style Box
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link --None--
Enter a short description.
Description
Save
Cancel

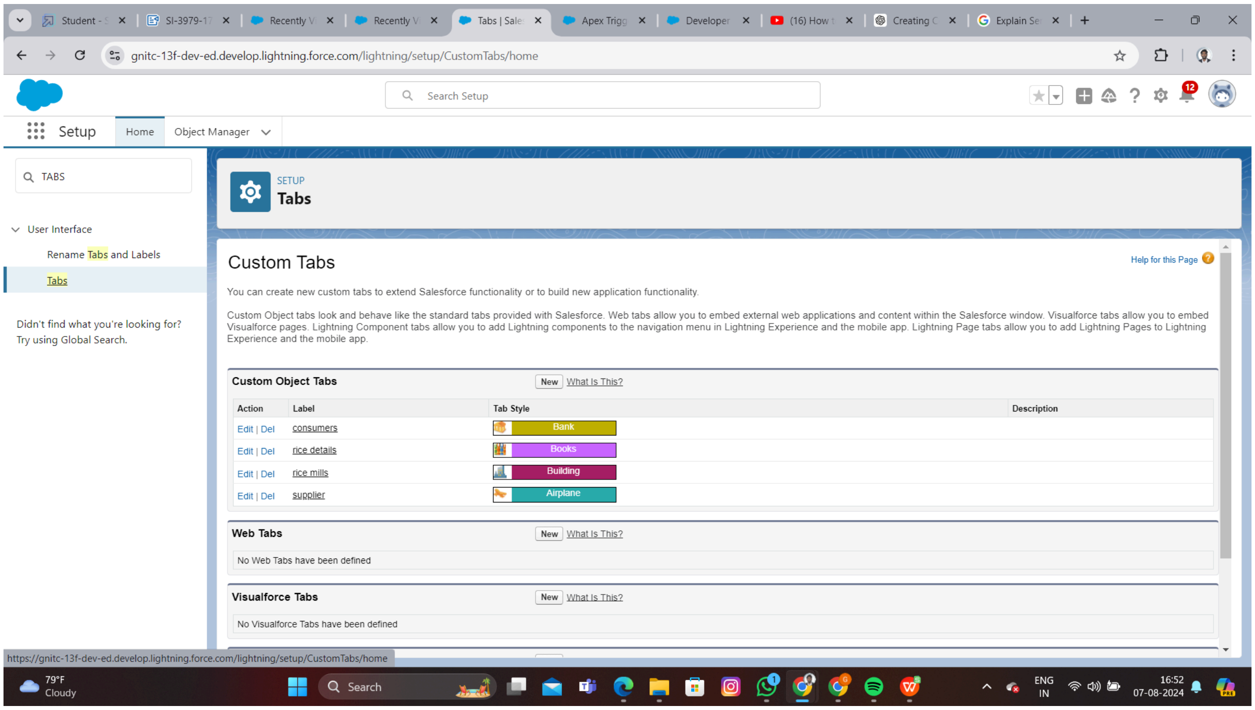

Tab Style Selector
Create your own style
Hide styles which are used on other tabs
Airplane
Alarm clock
Apple
Balls
Bank[1]
Bell
Big top
Boat[1]
Books
Bottle
Box
Bridge
Building
Building Block
Caduceus
Camera
Can
Car
Castle
CD/DVD
Cell phone
Chalkboard
Chess piece
Chip
Circle
Compass
Computer
Credit card
CRT TV
Cup
Desk[1]
Diamond
Dice
Factory
Fan
Flag
Form
Gears
Globe
Guitar
Hammer
Hands
Handsaw
Headset
Heart[1]
Helicopter
Hexagon
Highway Sign
Hot Air Balloon
Insect
IP Phone
Jewel
Keys
Laptop
Leaf
Lightning
Save
Cancel


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

Task 8:

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 Task 7.

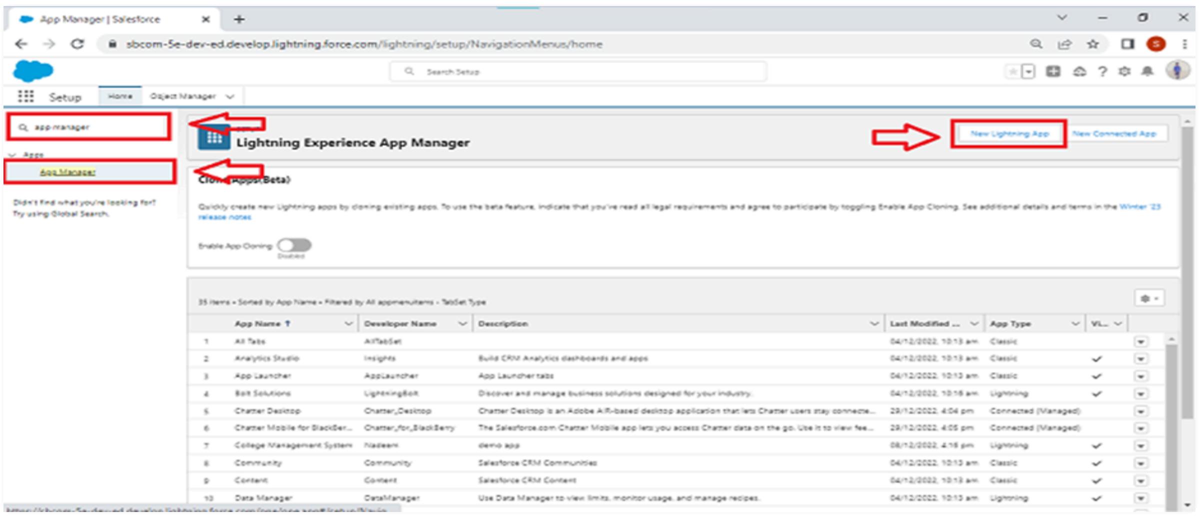


Task 9:

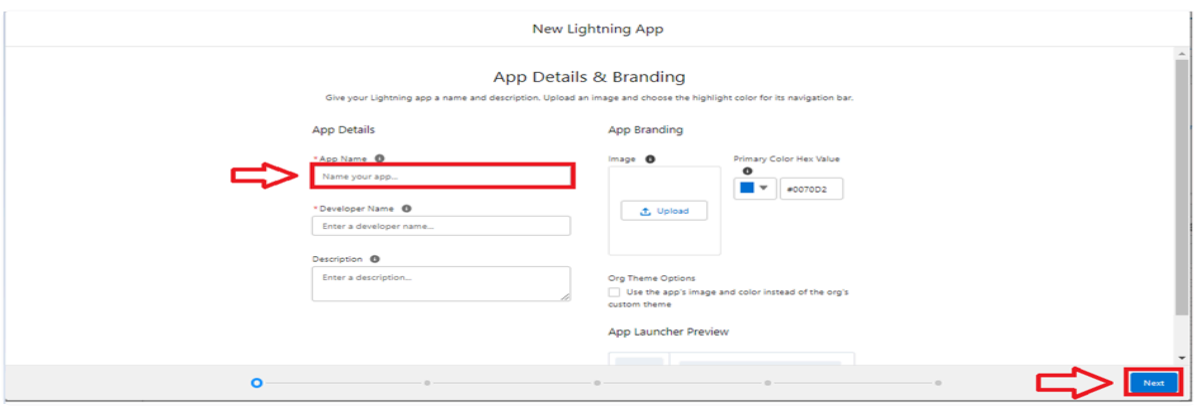
Create a Lightning App

To create a lightning app page:

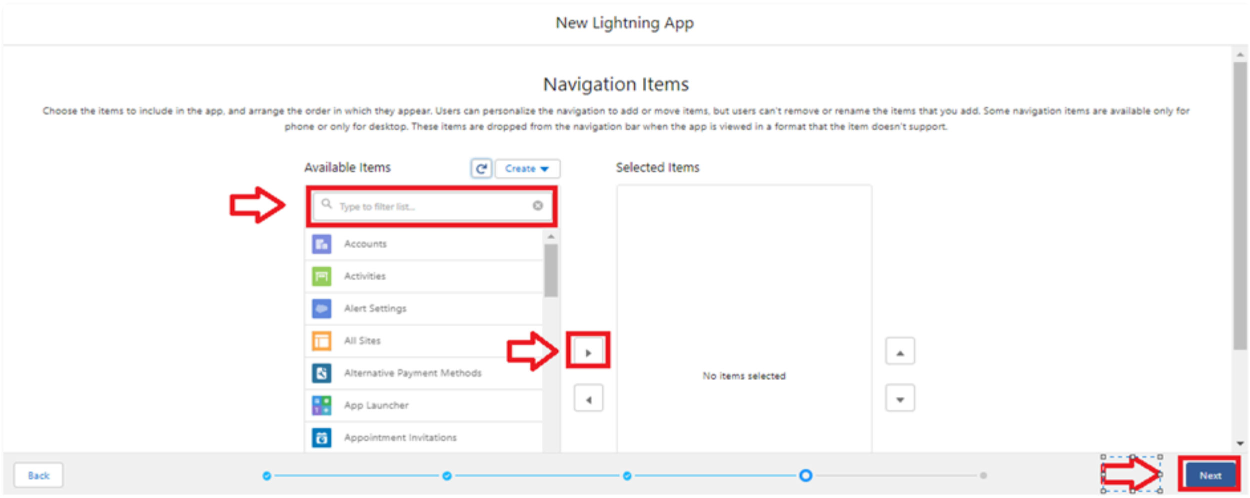
1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.



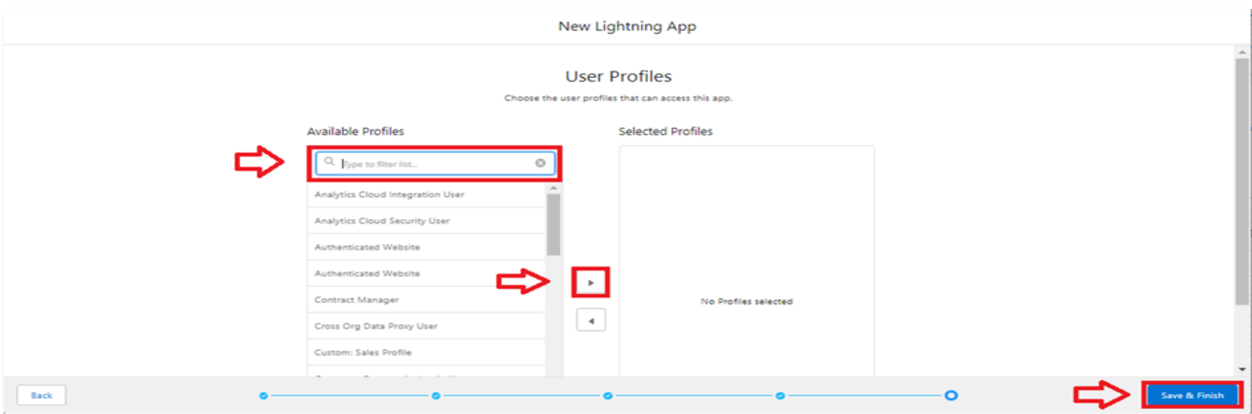
2. Fill the app name in app details as MY RICE >> Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.
3.



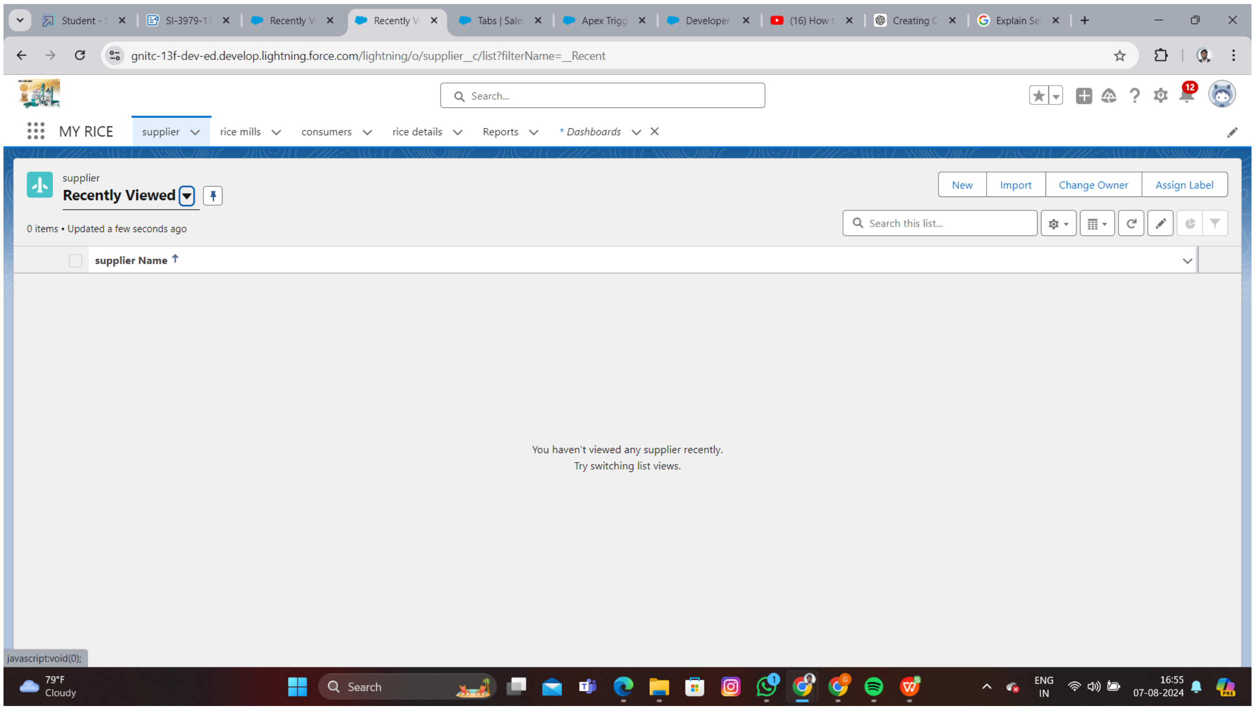
4. Upload a photo that is related to your app.
5. To add Navigation Item:



2. Select the items (supplier, rice mill, consumer , Rice details) from the search bar and move it using the arrow button >> Next.
3. To Add User Profiles:



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

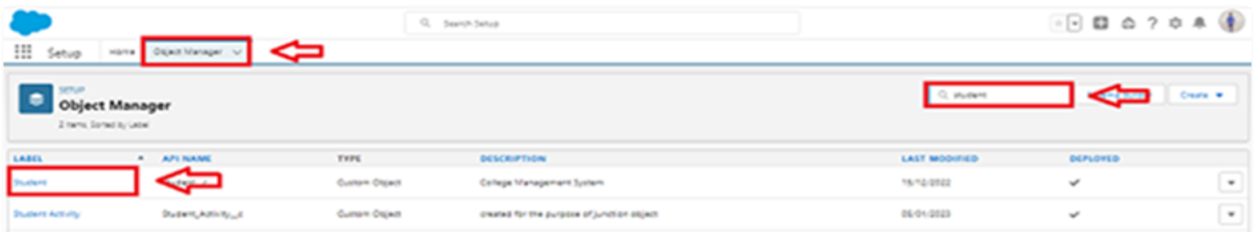

gnitc-13f-dev-ed.develop.lightning.force.com/lightning/o/supplier__c/list?filterName=__Recent
MY RICE
supplier
rice mills
consumers
rice details
Reports
* Dashboards
supplier
Recently Viewed
New
Import
Change Owner
Assign Label
0 items • Updated a few seconds ago
supplier Name
You haven't viewed any supplier recently.
Try switching list views.

Task 10:

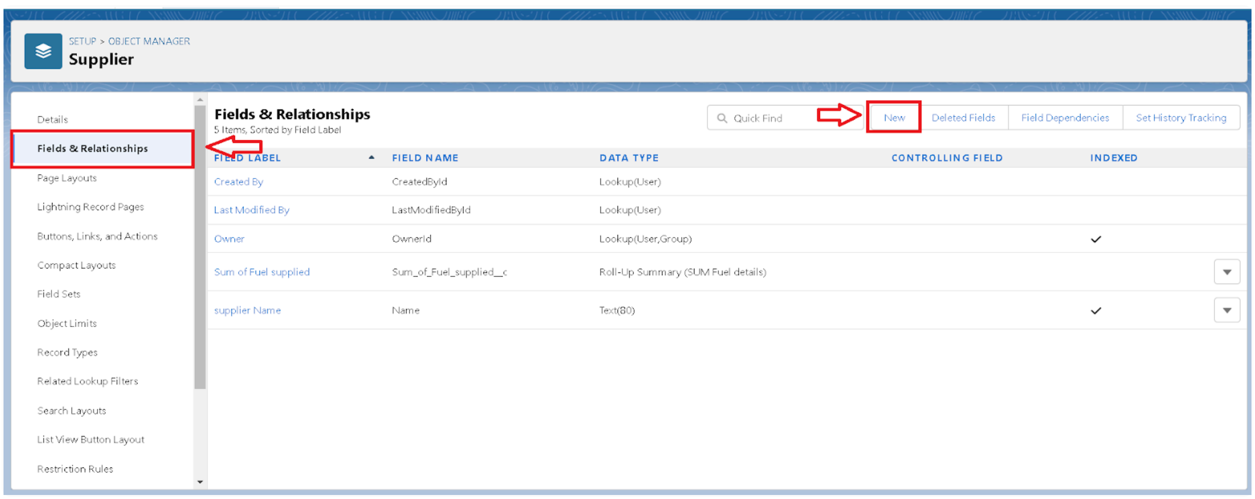
Creating the number field in rice details object

Creating the number field in rice details object

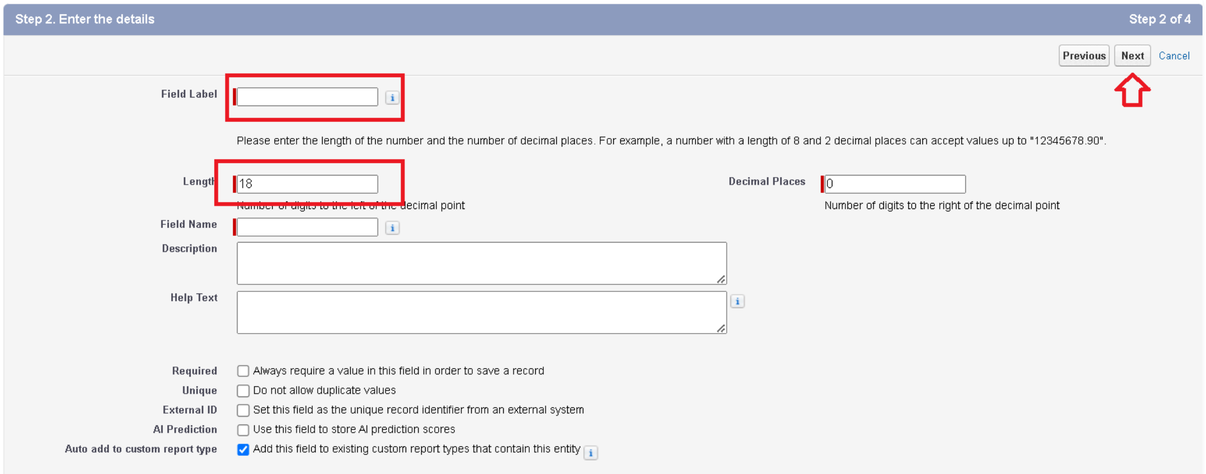
1. Go to the setup page >> click on object manager >> From drop down click edit for rice details object



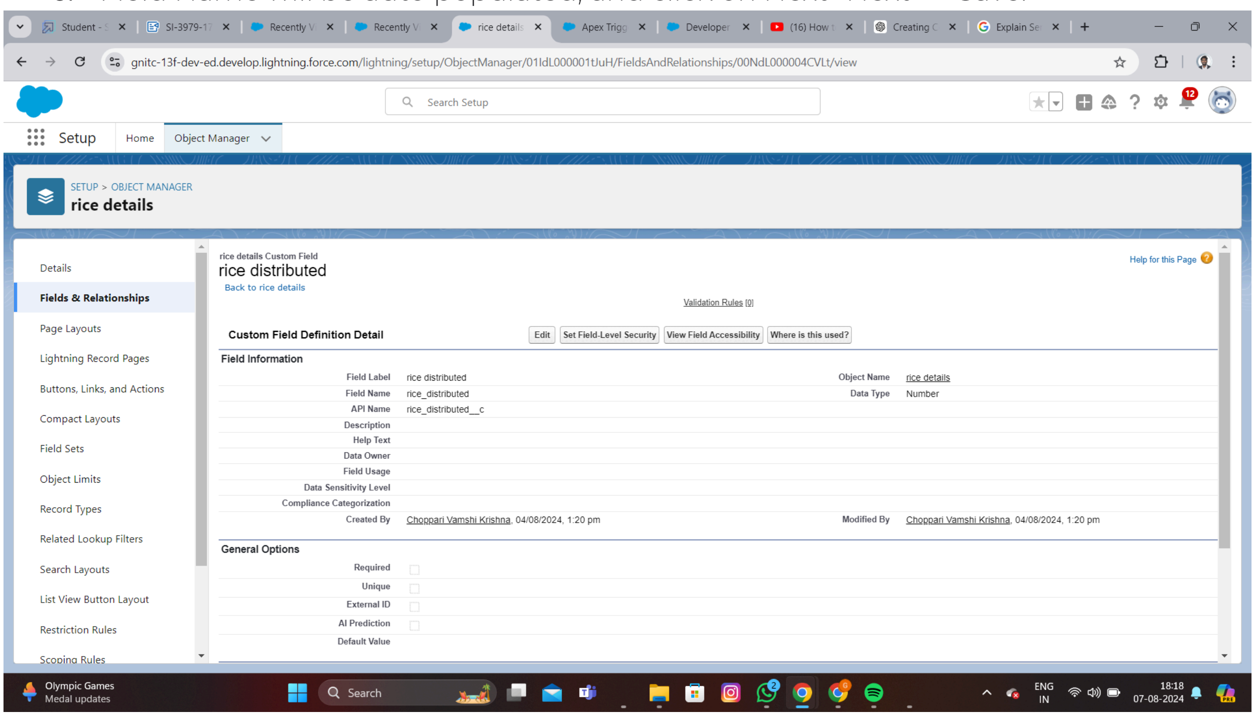
2. Click on fields & relationship >> click on New.



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



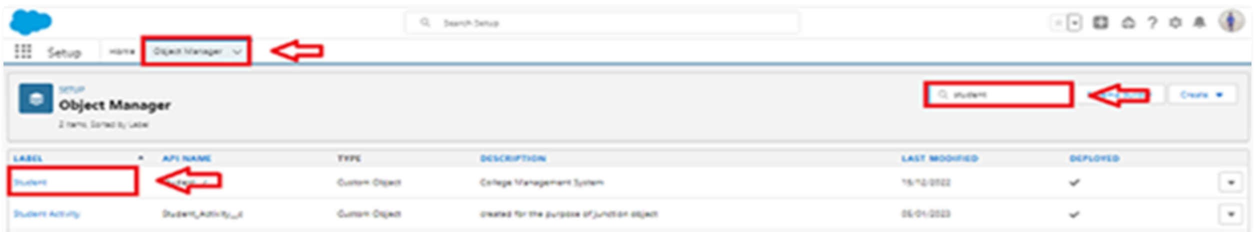
5. Field Name will be auto populated, and click on Next- Next >> Save.



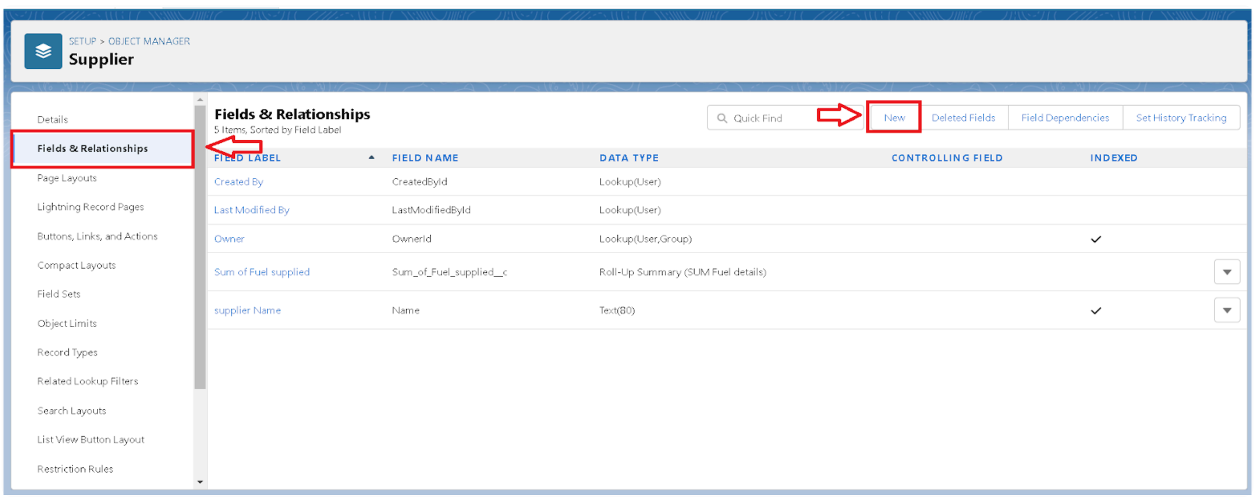
Task 11:

Creating Junction Object

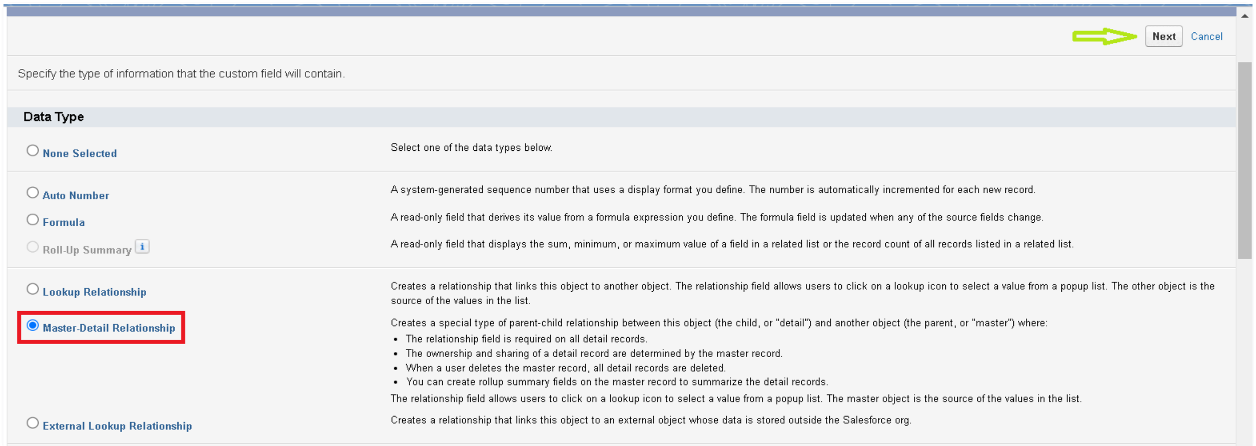
1.Go to the setup page >> click on object manager >> From drop down click edit for rice details   object



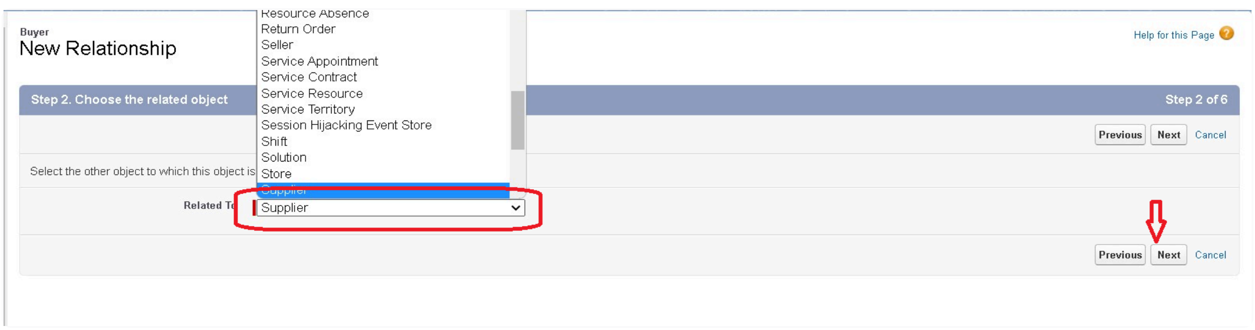
2. Click on fields & relationship - click on New.



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

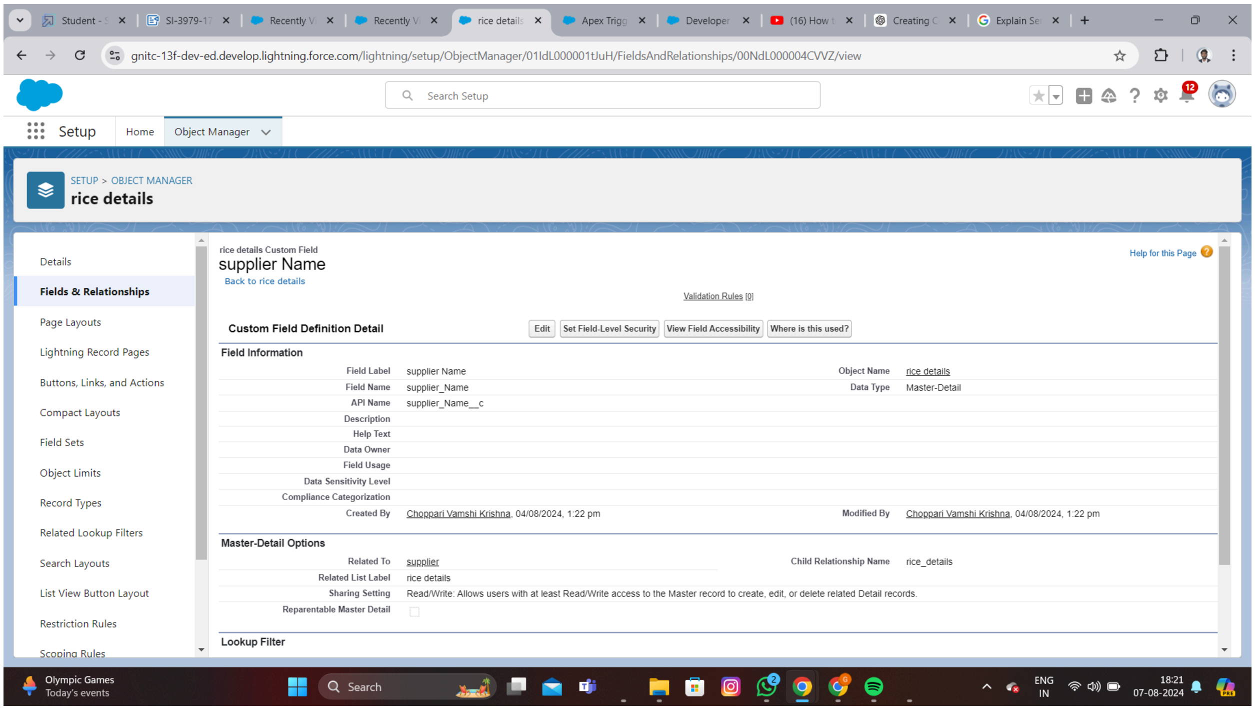


4. Select the related object “ supplier ” and click next.



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.

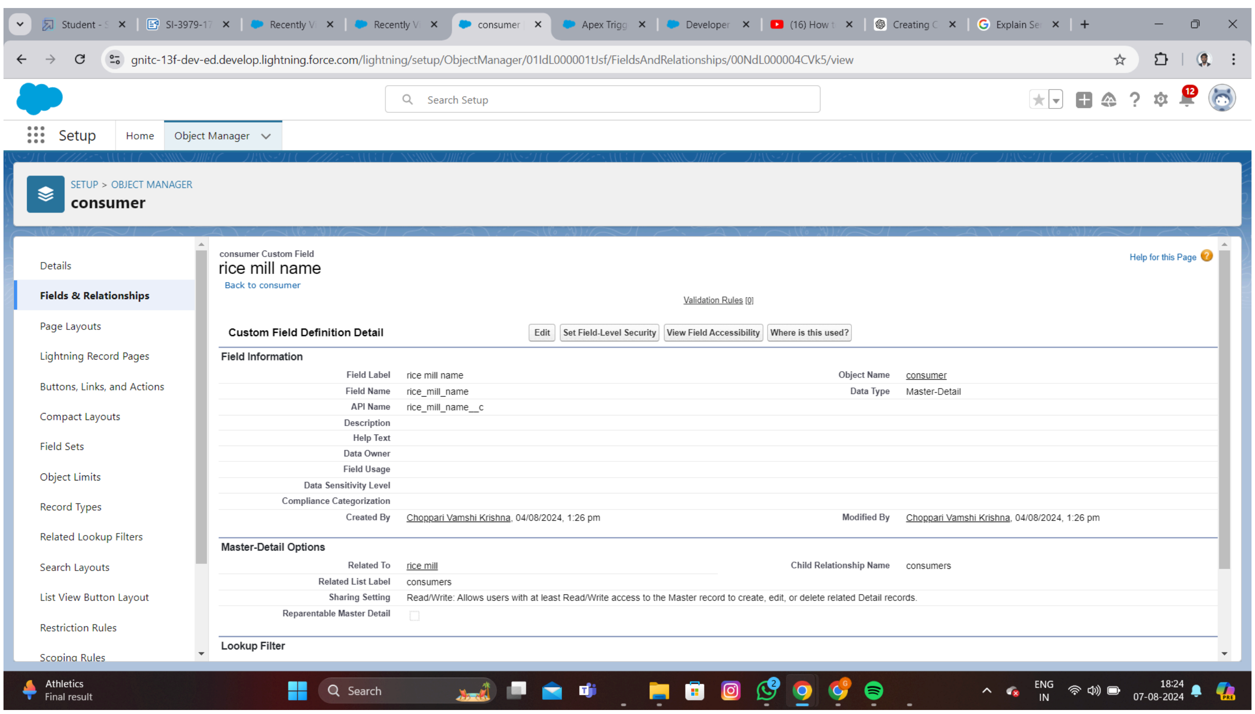

gnitc-13f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001tJuH/FieldsAndRelationships/00NdL000004CVVZ/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
rice details
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
rice details Custom Field
supplier Name
Back to rice details
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label supplier Name
Object Name rice details
Field Name supplier_Name
Data Type Master-Detail
API Name supplier_Name__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By Choppari Vamshi Krishna, 04/08/2024, 1:22 pm
Modified By Choppari Vamshi Krishna, 04/08/2024, 1:22 pm
Master-Detail Options
Related To supplier
Child Relationship Name rice_details
Related List Label rice details
Sharing Setting Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
Reparentable Master Detail
Lookup Filter
Olympic Games
Today's events
Search
ENG
IN
18:21
07-08-2024

Task 12:

Creating a Master-Detail Relationship

Creating Master-Detail Relationship between consumer & rice mill Object
To Create a Master-Detail relationship

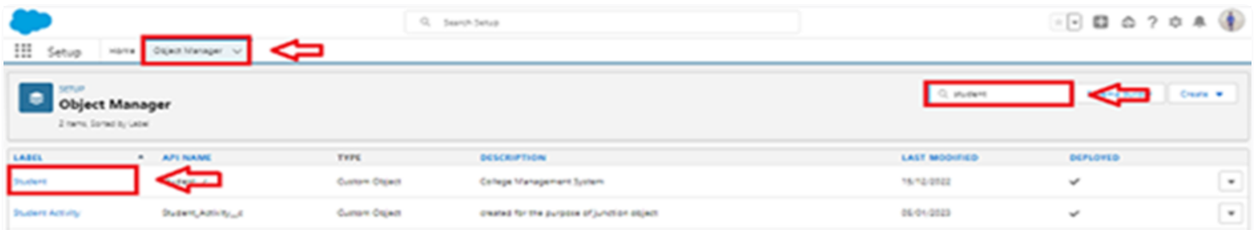
1. Go to the setup page >> click on object manager >> From drop down click edit for consumer object.
2. Click on fields & relationship >> click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. Select the related object “ rice mill”.
5. Give Field Label as “rice mill name”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



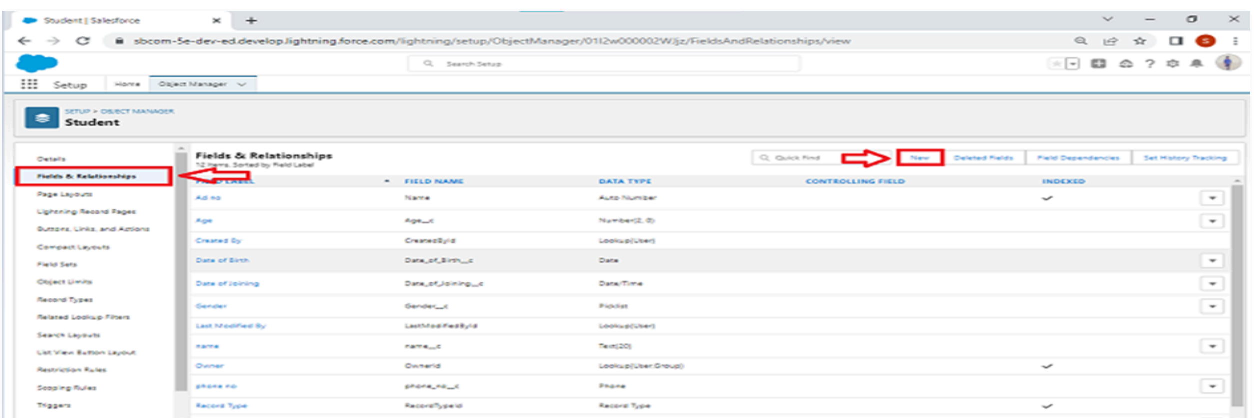
Task 13:

Creating the Roll-up Summary

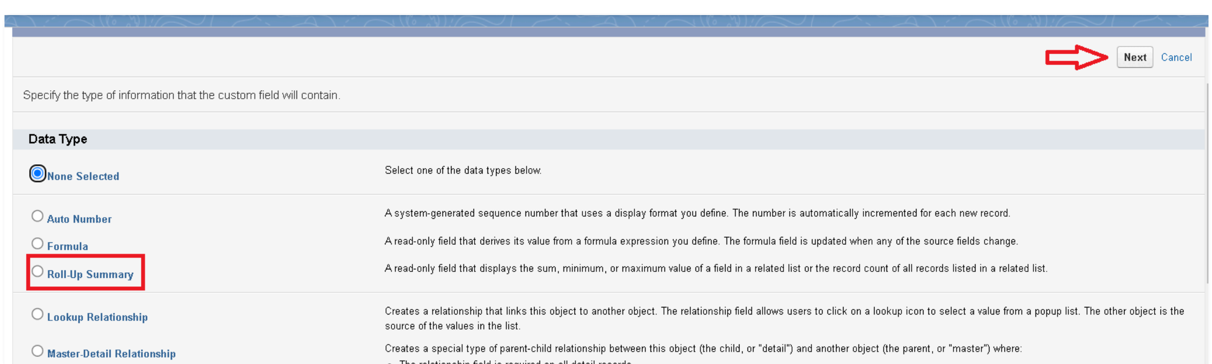
1. Go to setup >> click on Object Manager >> type object name(supplier) in search bar >> click on the object.



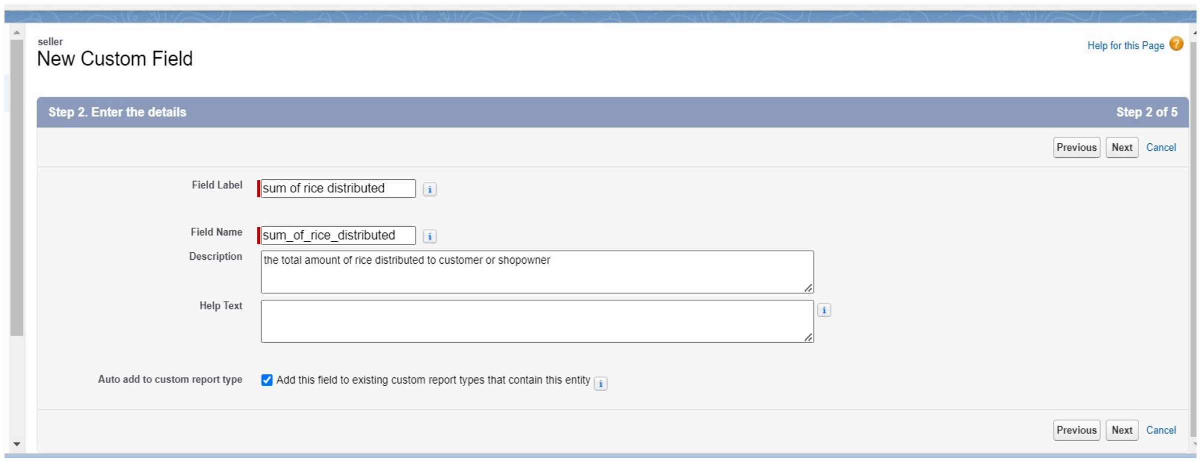
2. Now click on “Fields & Relationships” >> New



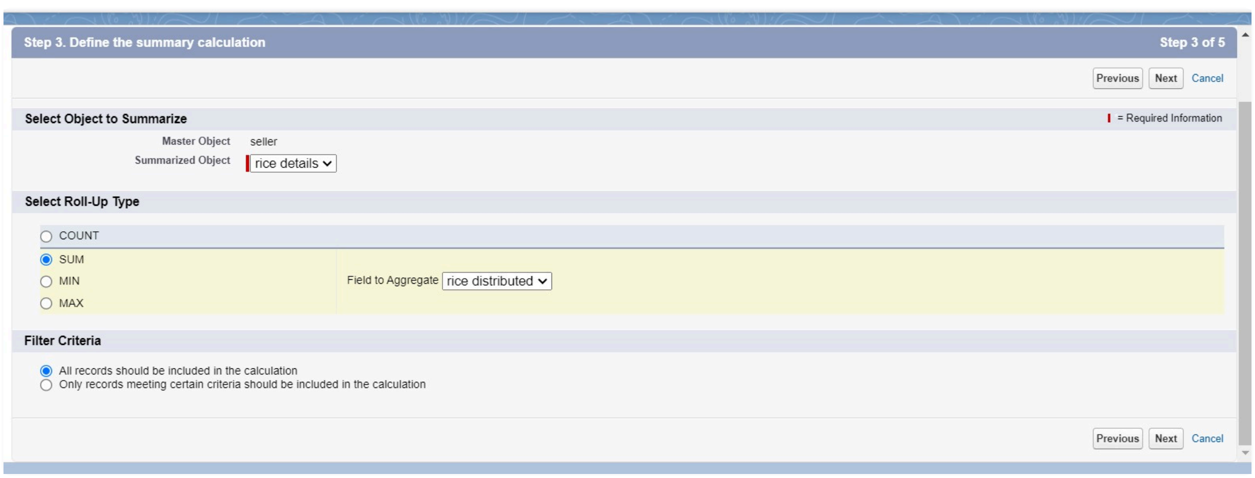
3. Select the data type as “Rollup summary ”,and click Next.



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

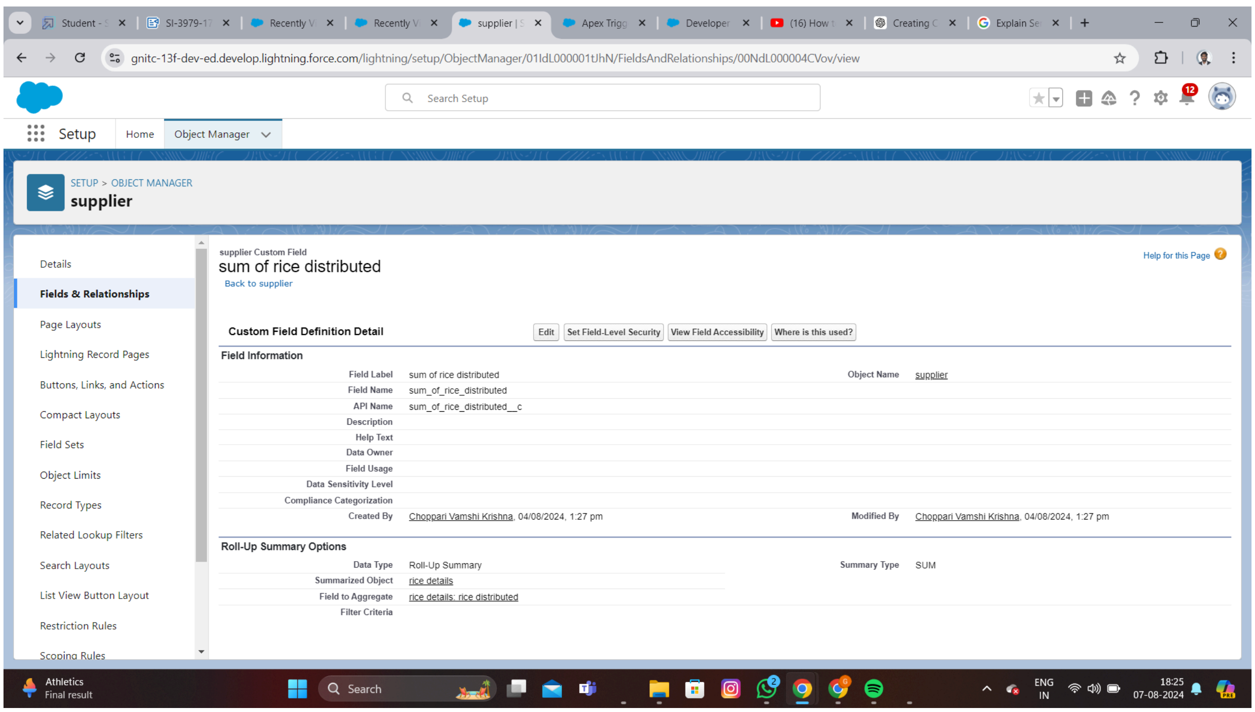


5. Select the summarized object as “ rice details ”.
6. Select the Rollup type as “sum”.
7. Select the field to aggregate as “ rice distributed ”, and click Next >>Next >>Save.



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.

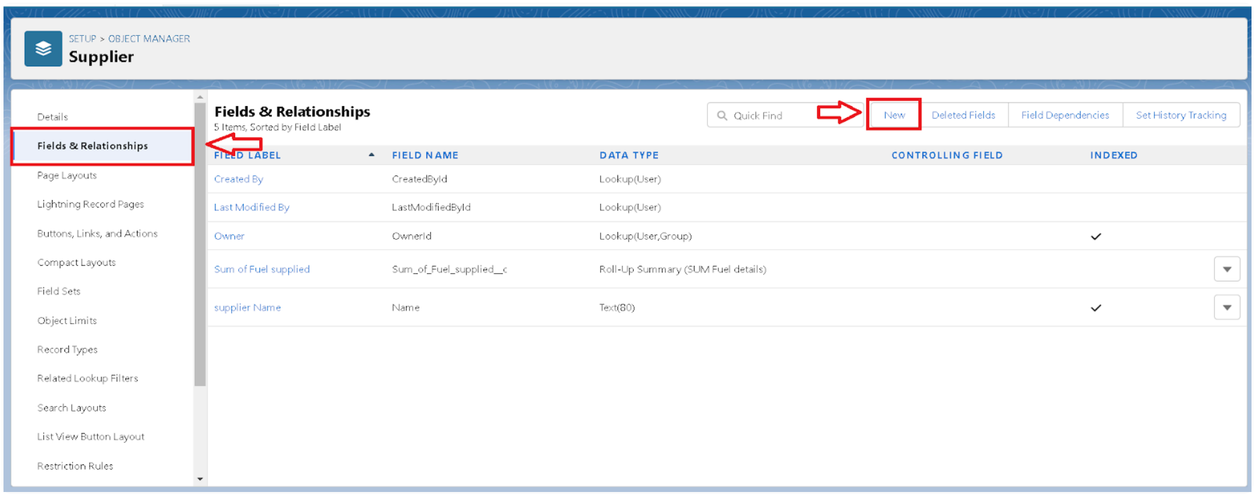


Task 14:

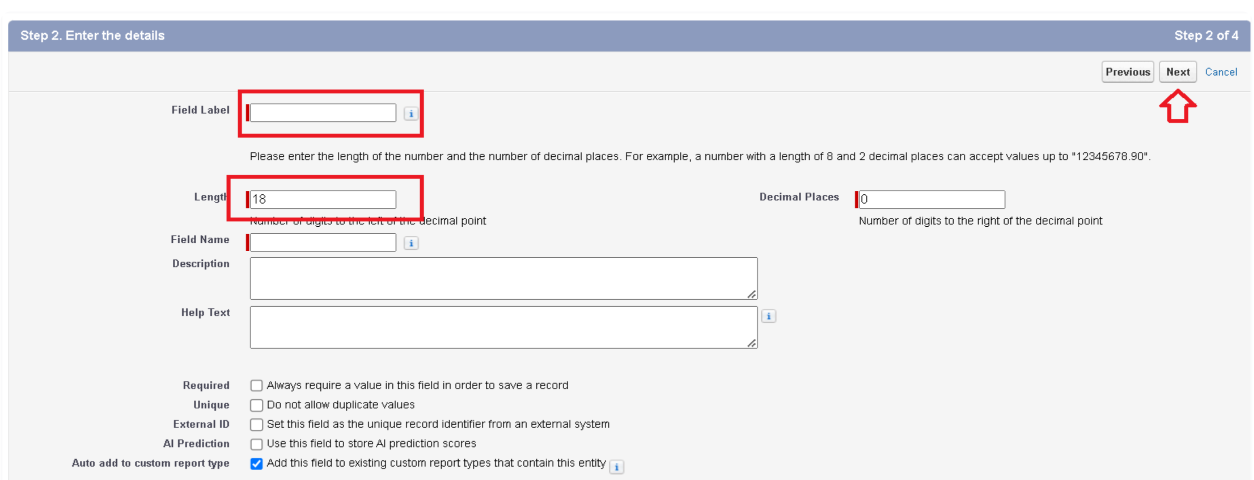
Creating Fields in Objects

Creating the number field in rice details object

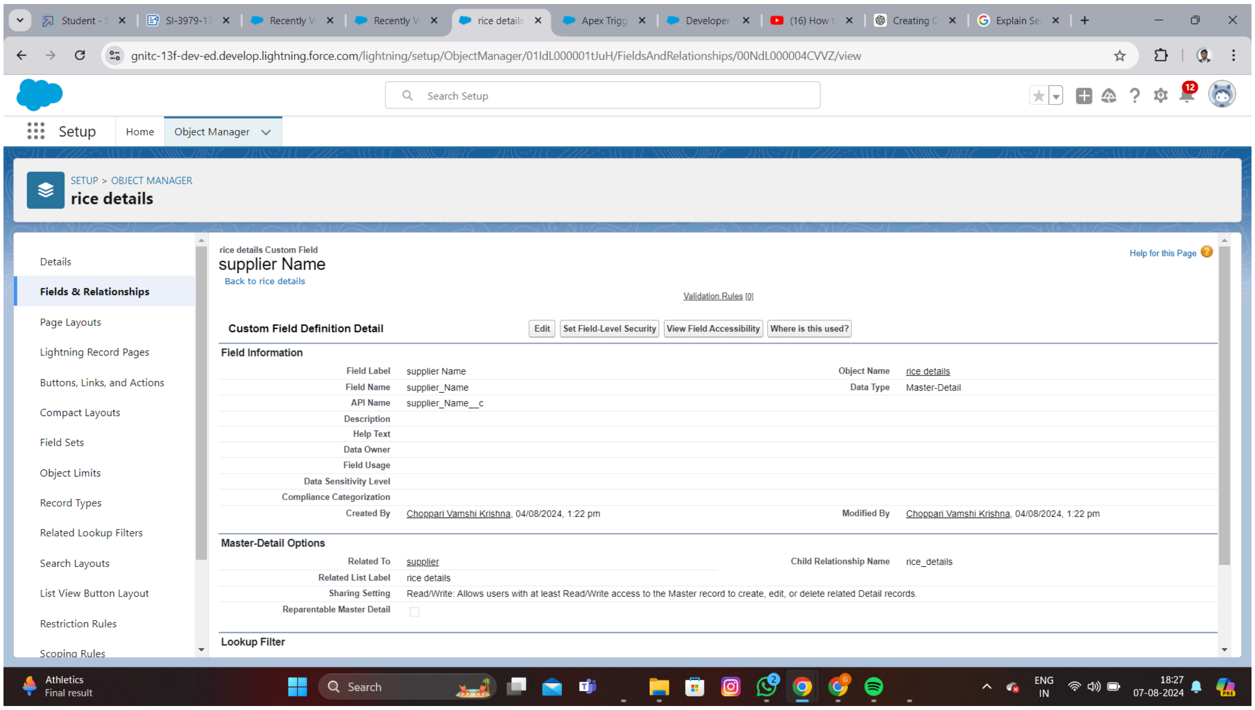
1. Go to the setup page >> click on object manager >> From drop down click edit for rice details object.
2. Click on fields & relationship >> click on New.



3. Select Data type as “number" and click Next.
4. Given the Field Label as “ supplier name ” and length as “ 5



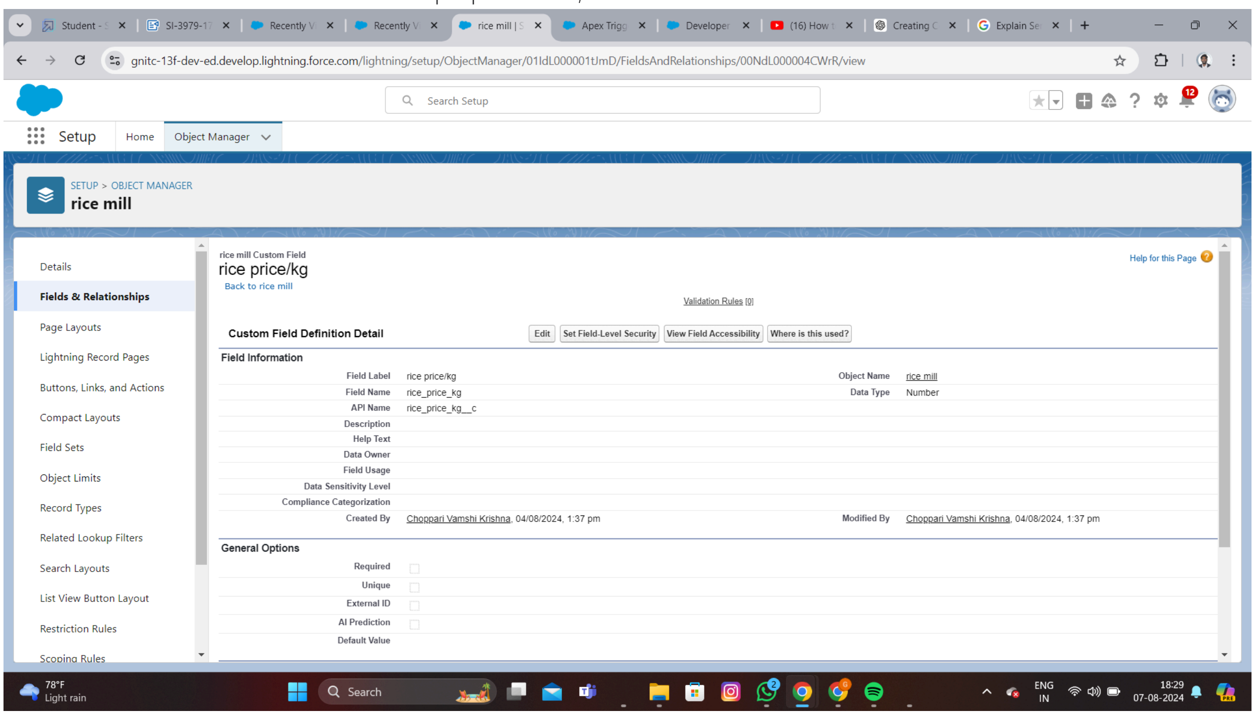
5. Field Name will be auto populated, and click on Next>> Next >>Save.


gnitc-13f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001tUuH/FieldsAndRelationships/00NdL000004CVVZ/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
rice details
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
rice details Custom Field
supplier Name
Back to rice details
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label supplier Name
Object Name rice details
Field Name supplier_Name
Data Type Master-Detail
API Name supplier_Name__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By Choppari Vamshi Krishna, 04/08/2024, 1:22 pm
Modified By Choppari Vamshi Krishna, 04/08/2024, 1:22 pm
Master-Detail Options
Related To supplier
Child Relationship Name rice_details
Related List Label rice details
Sharing Setting Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
Reparentable Master Detail
Lookup Filter
Athletics
Final result
Search
ENG
IN
18:27
07-08-2024

Task 15:

Creating Fields in rice mill Objects

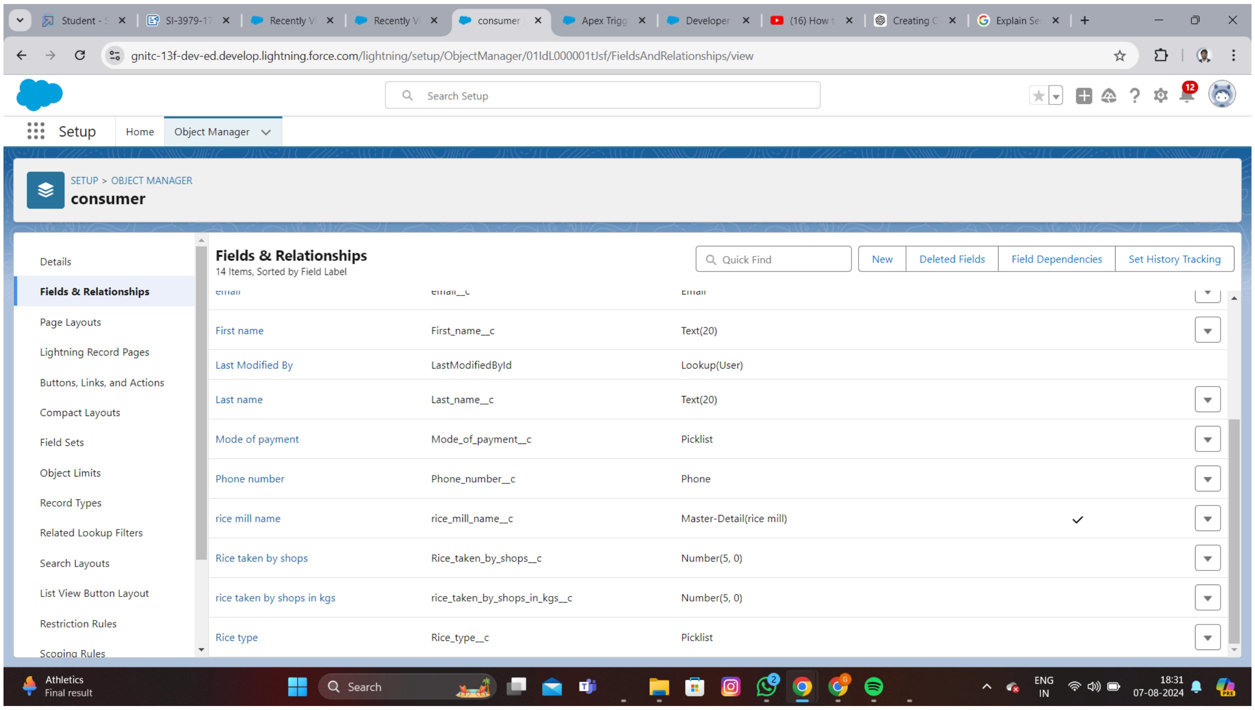
1. Go to the setup page >> click on object manager >> From drop down click edit for rice mill object.
2. Click on fields & relationship >> click on New.
3. Select Data type as “number" and click Next.
4. Given the Field Label as “ rice price/kg” length as “ 5
5. Field Name will be auto populated, and click on Next>> Next >>Save.



Task 16:

Creating Fields in consumer Objects

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


gnitc-13f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001Usf/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
consumer
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Fields & Relationships
14 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
First name
First_name__c
Text(20)
Last Modified By
LastModifiedById
Lookup(User)
Last name
Last_name__c
Text(20)
Mode of payment
Mode_of_payment__c
Picklist
Phone number
Phone_number__c
Phone
rice mill name
rice_mill_name__c
Master-Detail(rice mill)
Rice taken by shops
Rice_taken_by_shops__c
Number(5, 0)
rice taken by shops in kgs
rice_taken_by_shops_in_kgs__c
Number(5, 0)
Rice type
Rice_type__c
Picklist
Athletics
Final result
Search
ENG
IN
18:31
07-08-2024

Task 17:

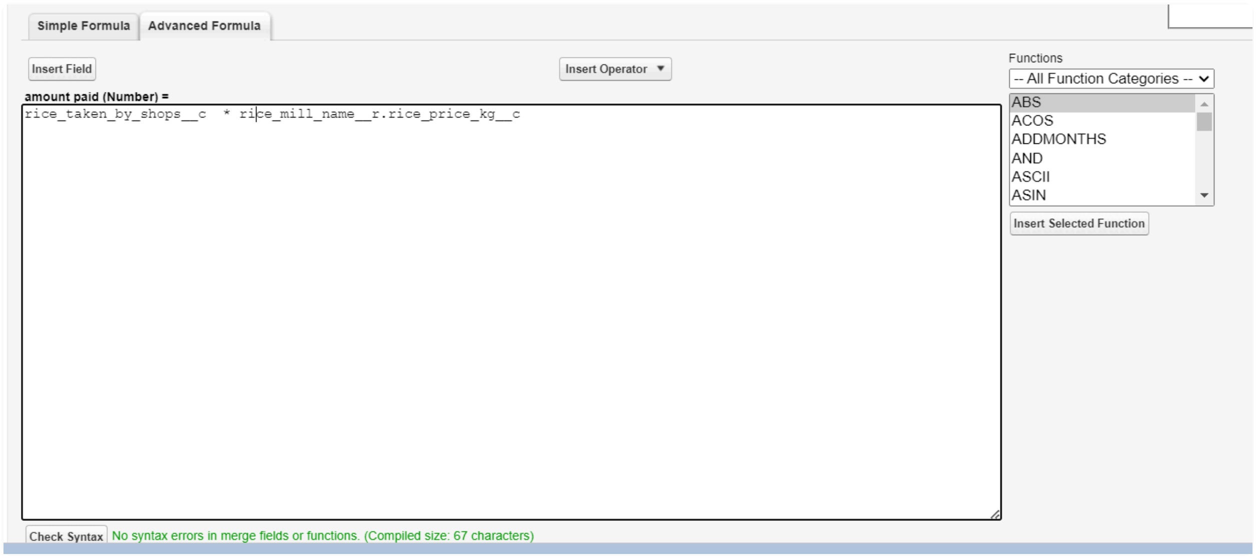
Creating Cross Object Formula Field in consumer Object

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 :

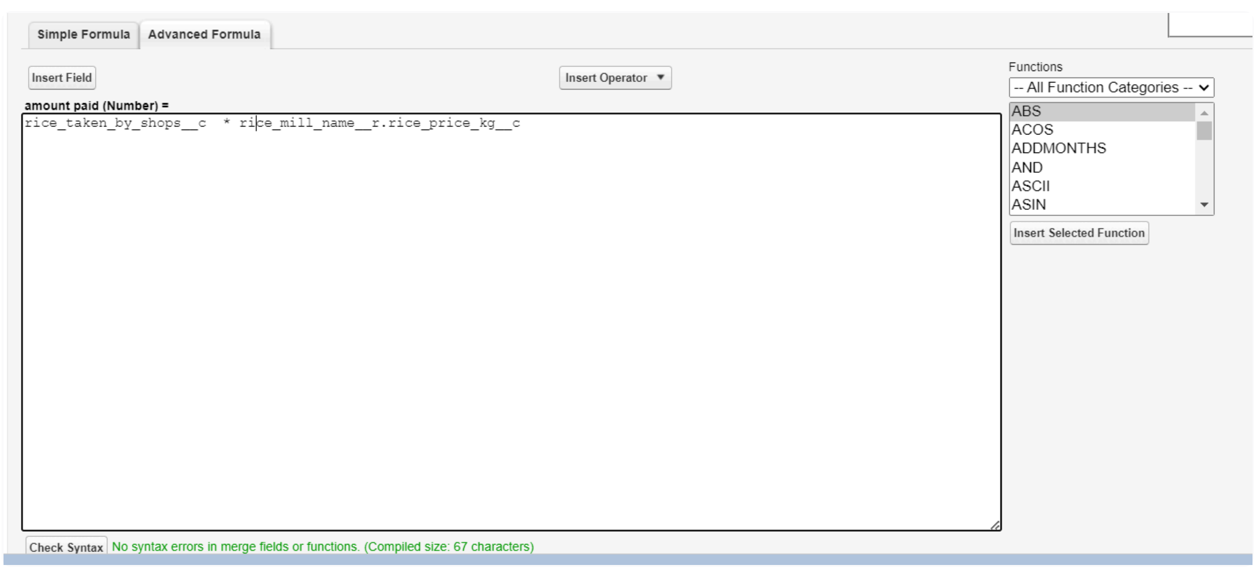
   rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c

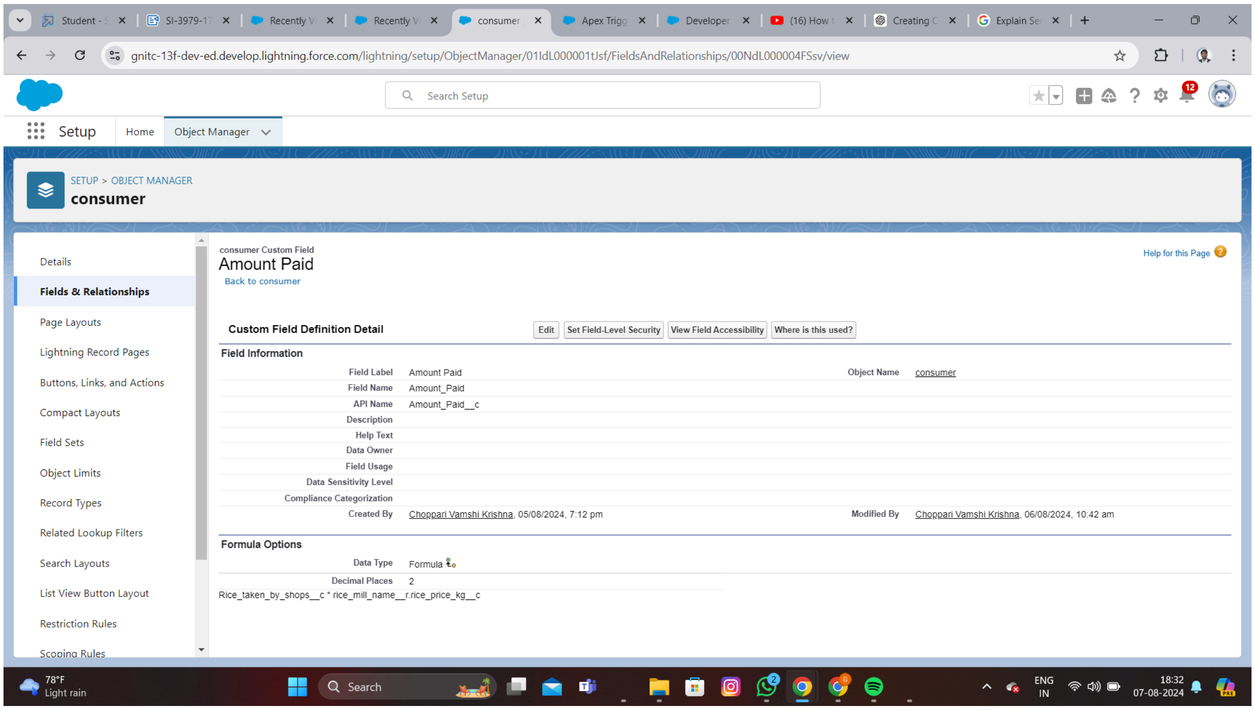
6. Under Advanced Formula write down the formula and click “Check Syntax” and Save.



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

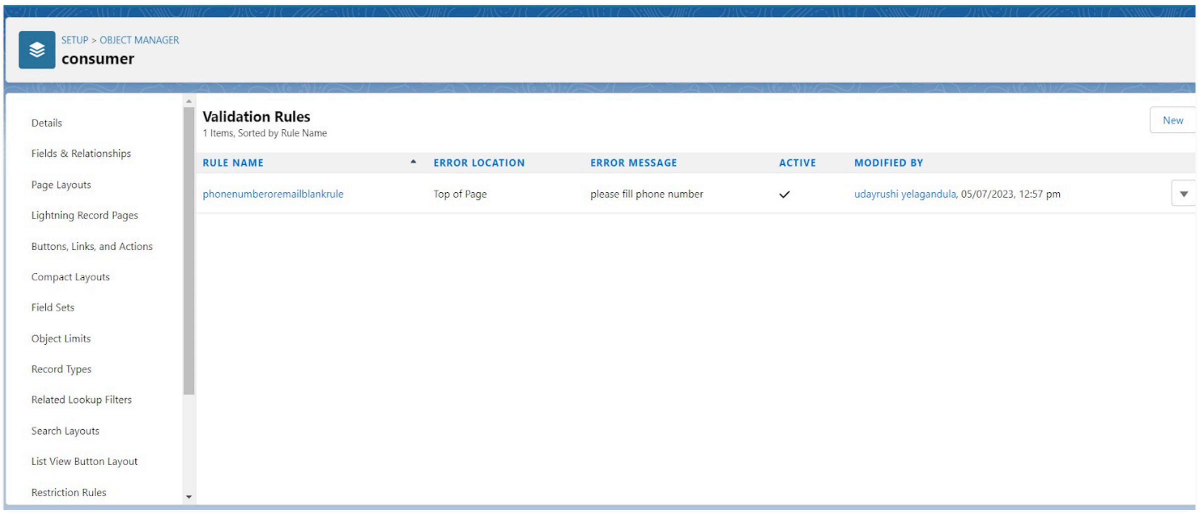
2. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
3. Click on fields & relationship >> click on New.
4. Select Data type as “Formula” and click Next.
5. Give Field Label and Field Name as “Consumer Name” and select formula return type as “TEXT” and click next.
6. Insert field formula should be : First_Name__c + ' ' + Last_Name__c
7. click “Check Syntax” and Save.
8. 

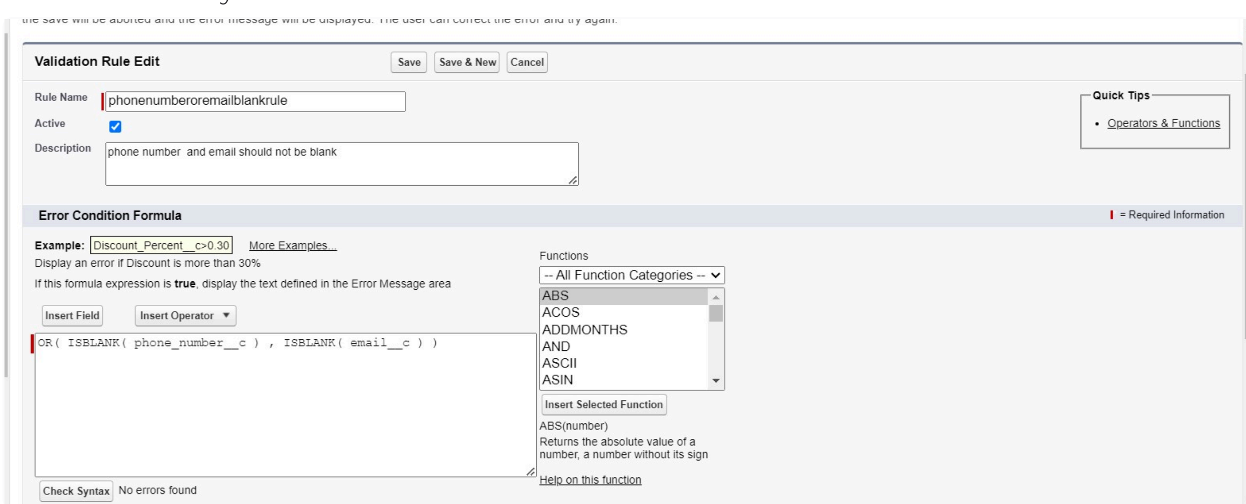

gnitc-13f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001tJsf/FieldsAndRelationships/00NdL000004FSsv/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
consumer
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
consumer Custom Field
Amount Paid
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 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 Choppari Vamshi Krishna, 05/08/2024, 7:12 pm
Modified By Choppari Vamshi Krishna, 06/08/2024, 10:42 am
Formula Options
Data Type Formula
Decimal Places 2
Rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c
78°F
Light rain
Search
ENG
IN
18:32
07-08-2024

Task 18:

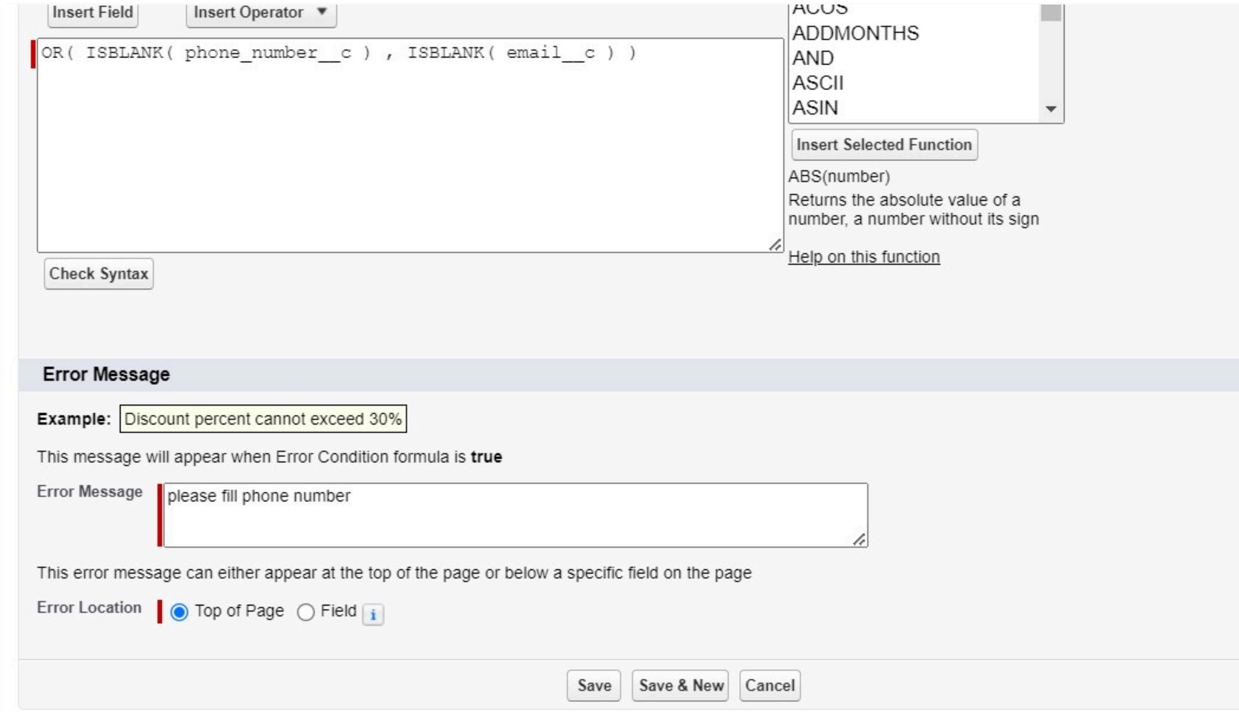
Creating the validation rule

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.

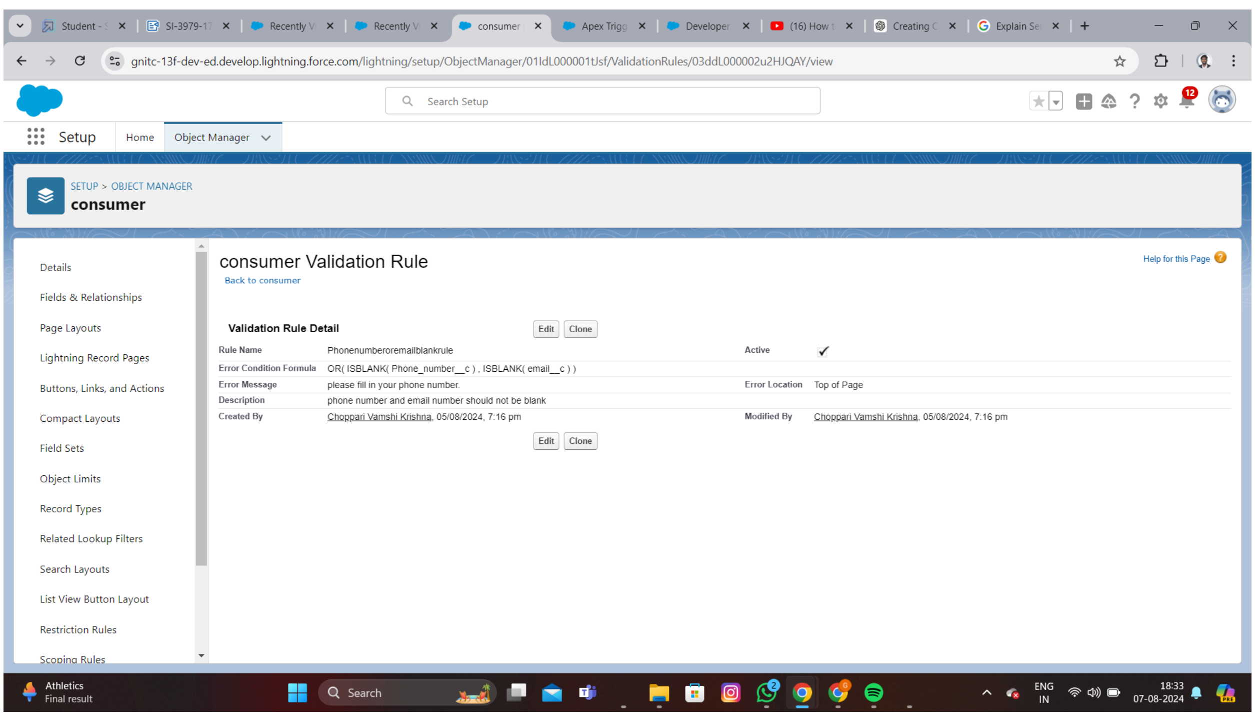


3. Enter the Rule name as “Phonenumberoremailblankrule ”.
4. Enter the description as “phone number and email number should not be blank”.
5. Enter the formula as “OR(ISBLANK(phone_number__c) , ISBLANK(email__c))” and check the syntax.
6. 

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

9. 

10. Save the validation rule.

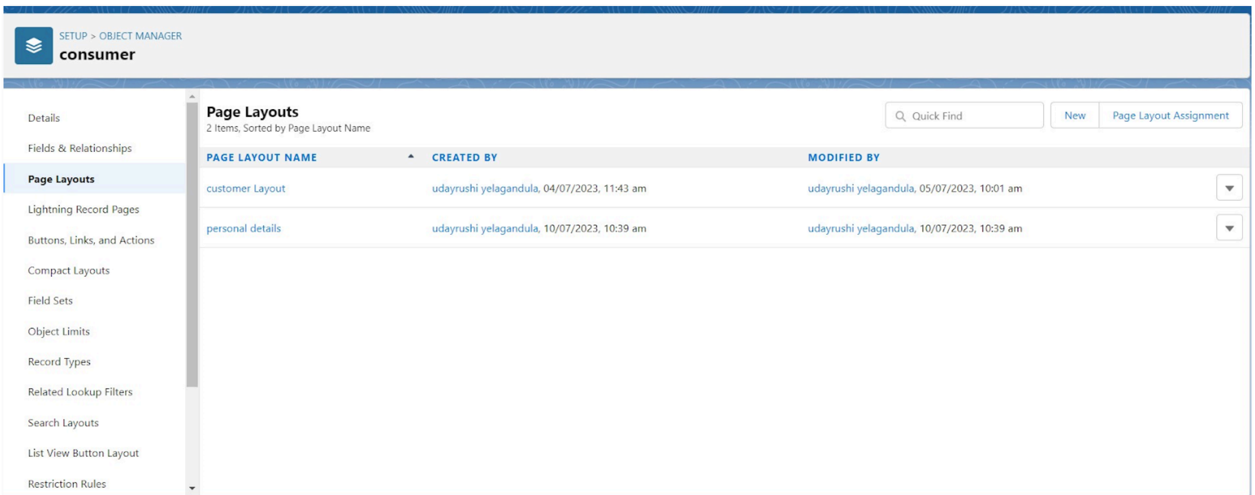


Task 19:

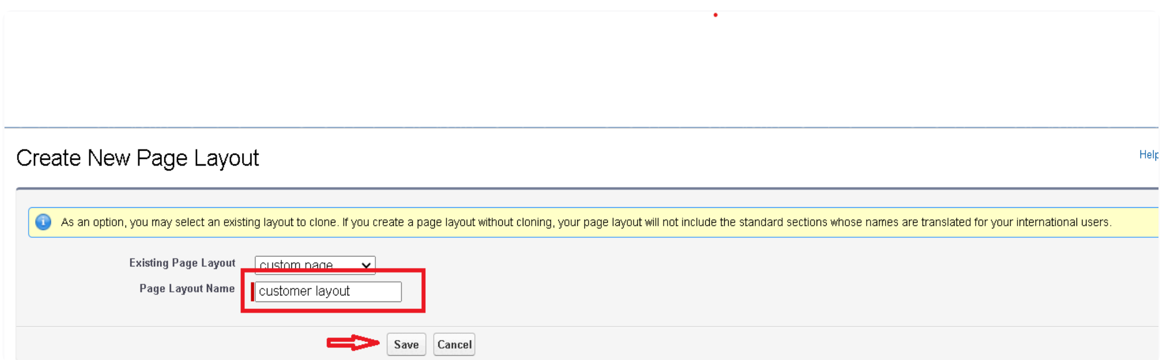
creating the page layout

To Create a Page layout:

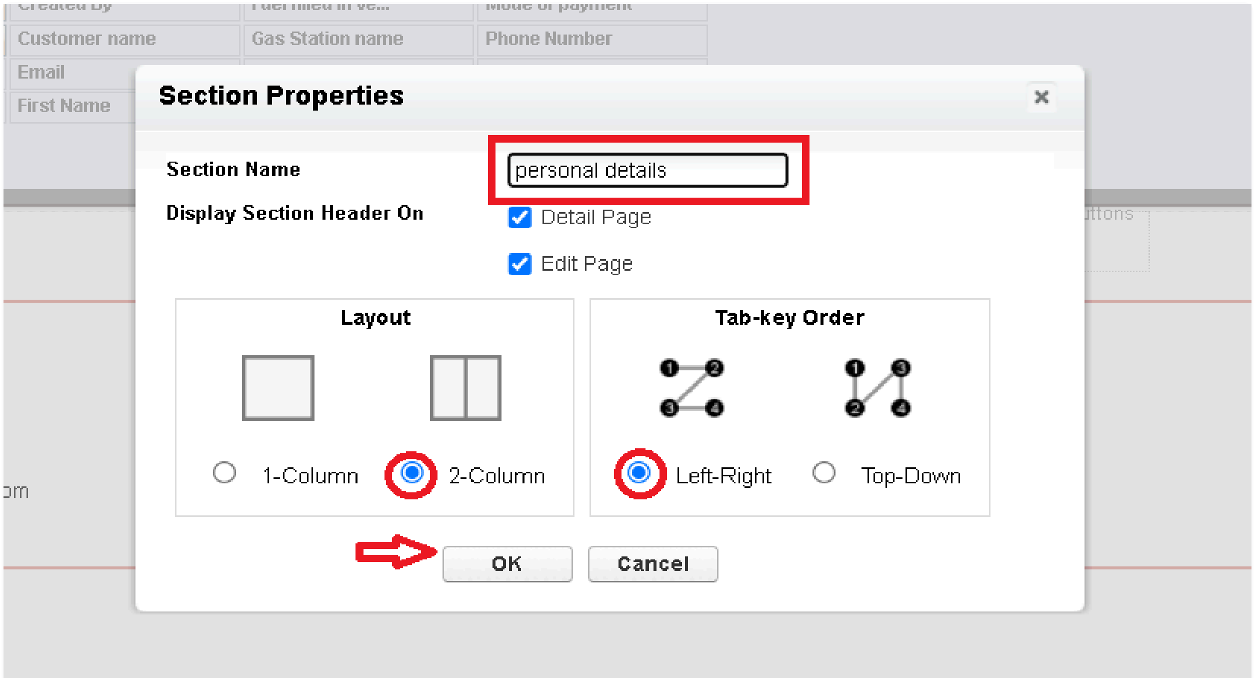
1. Go to Setup >> Click on Object Manager >>Search for the object (consumer) >> From drop down select the object and click on it.
2. Click on Page layout >> Click on New.



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



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



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

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

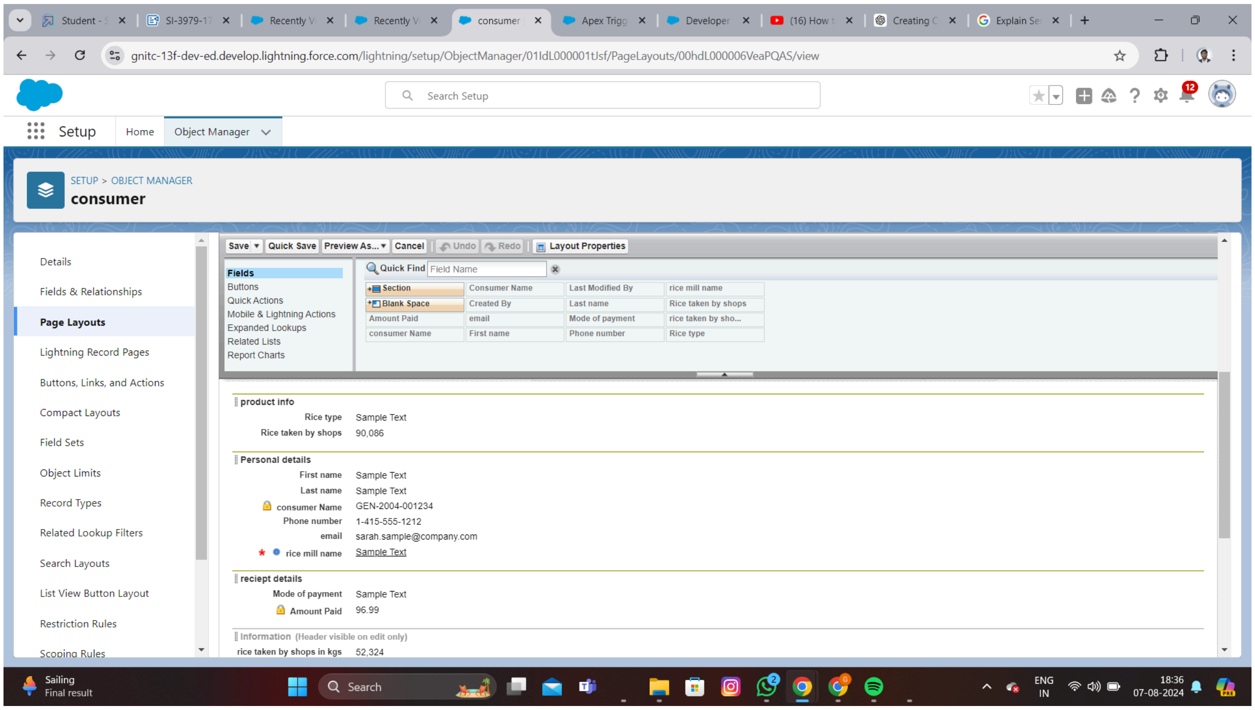
8. Follow the same process for another two sections as shown above , they are
9. One section is " rice details " , drag the fields that are

- Rice taken by shop, rice type.

10. Another section is "Receipt details ", and drag the fields that are

- Mode of payment , Amount paid.

11. Then Click Save.

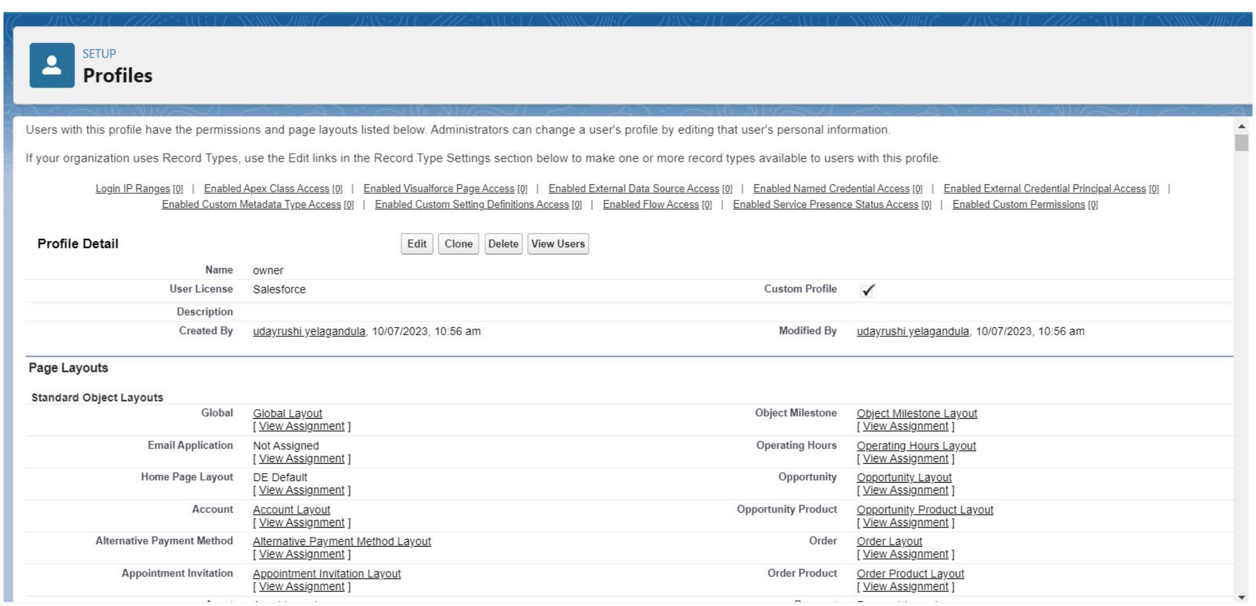
12. 

Task 20:

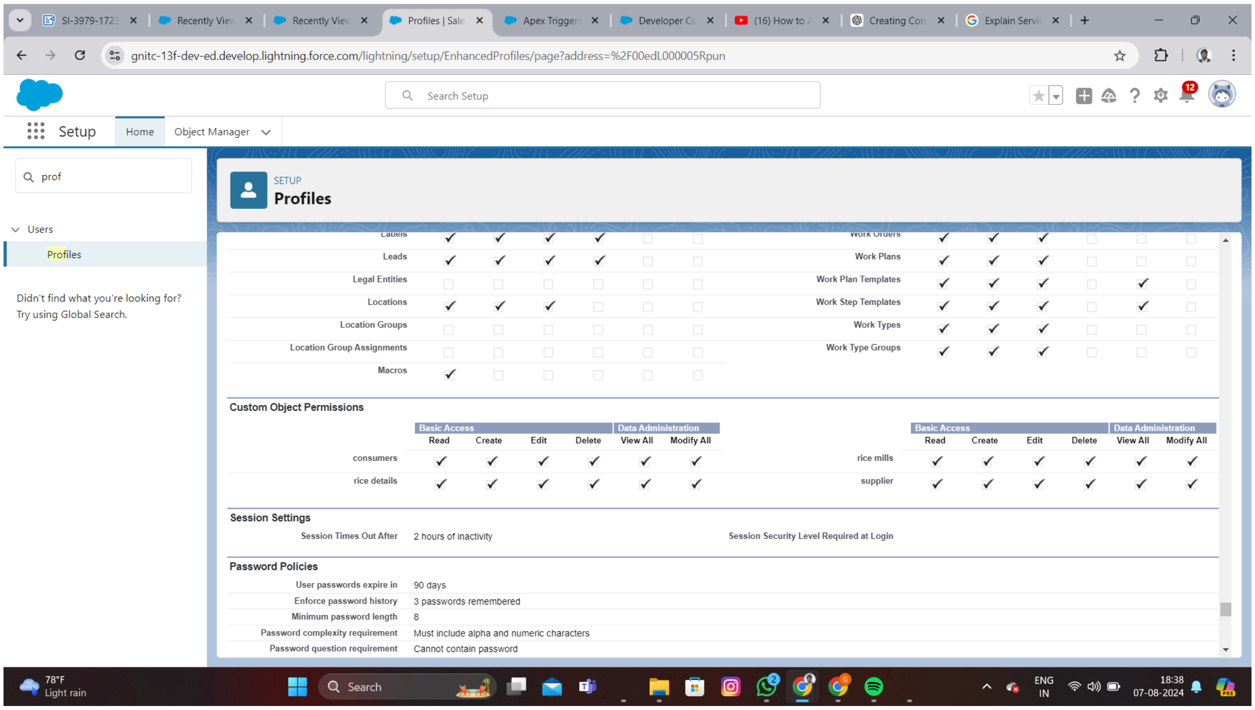
owner Profile

To create a new profile:

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

2. 

3. Click on Edit >> 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.



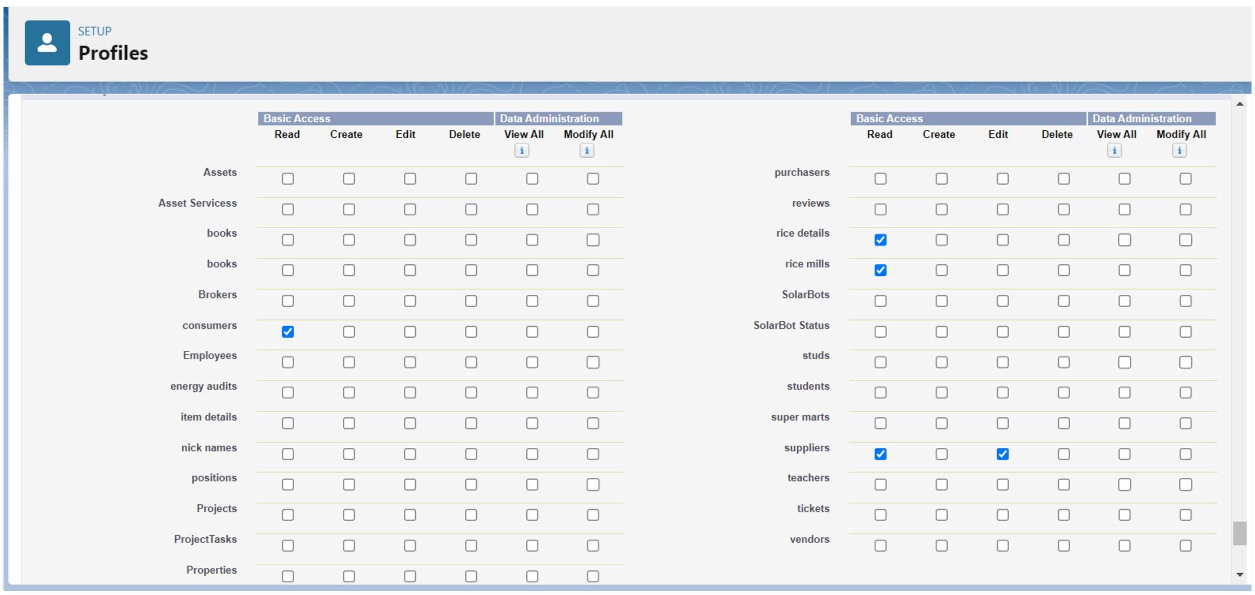
4.

5. Give access and save it.

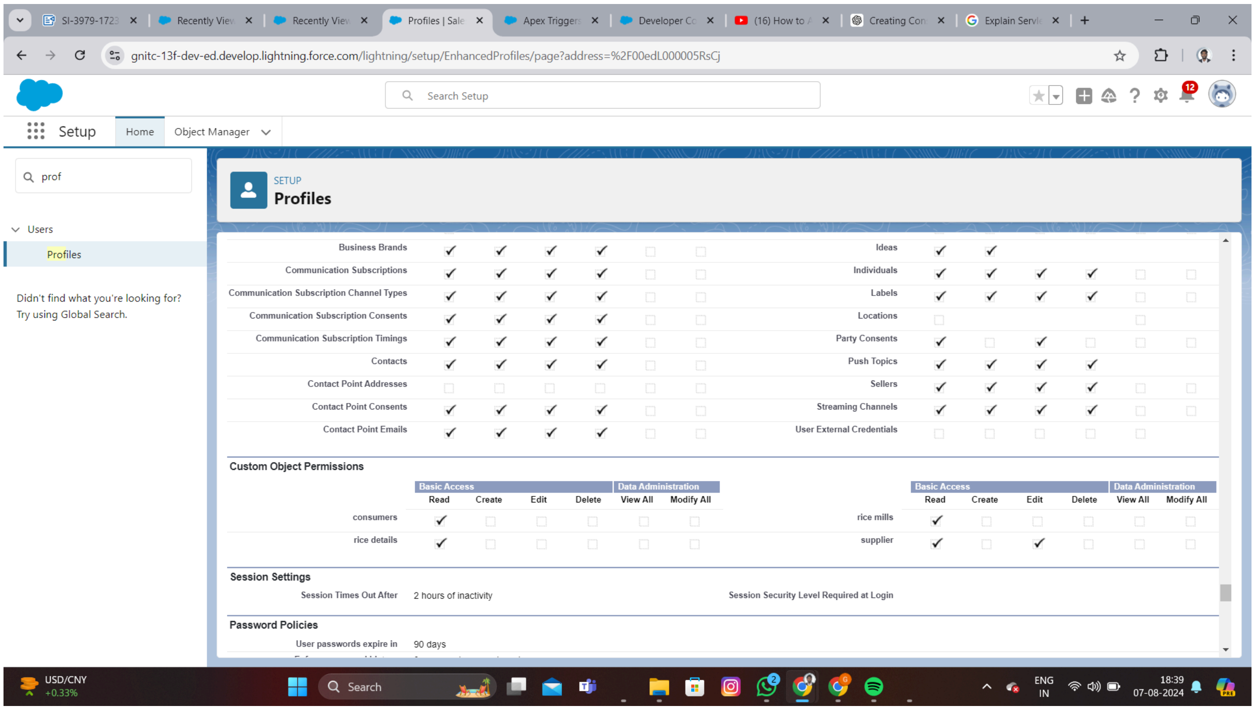
Task 21:

employer Profile

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



5. And click save.

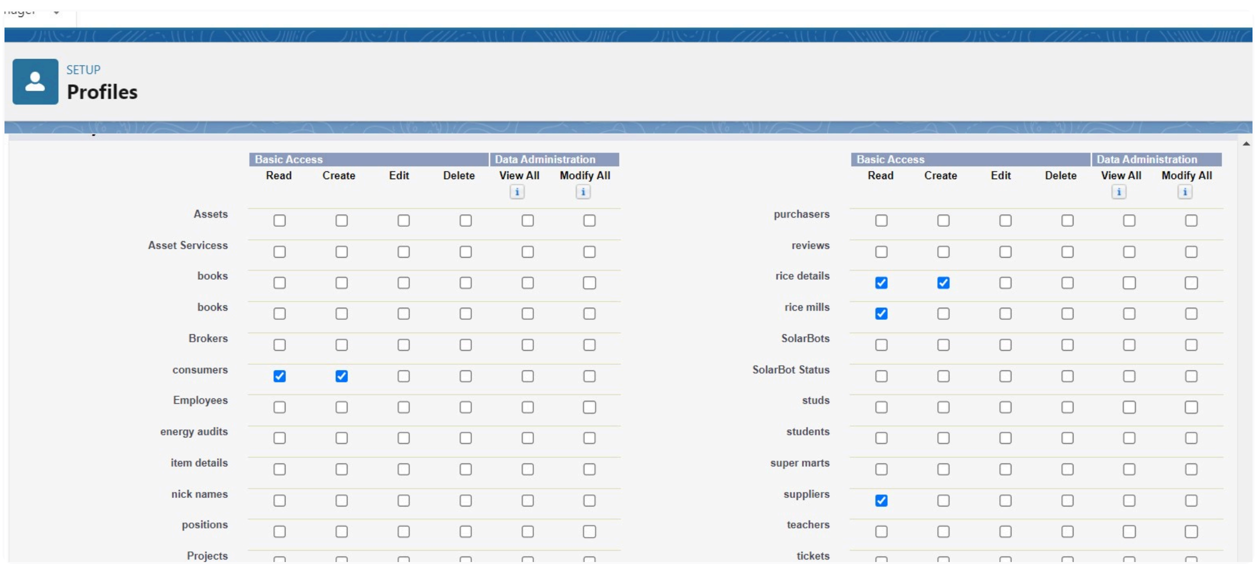


gnitc-13f-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edL000005RsCj
Search Setup
Setup
Home
Object Manager
prof
Users
Profiles
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
Business Brands
Communication Subscriptions
Communication Subscription Channel Types
Communication Subscription Consents
Communication Subscription Timings
Contacts
Contact Point Addresses
Contact Point Consents
Contact Point Emails
Ideas
Individuals
Labels
Locations
Party Consents
Push Topics
Sellers
Streaming Channels
User External Credentials
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
consumers
rice details
rice mills
supplier
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
Password Policies
User passwords expire in
90 days
USD/CNY
+0.33%
Search
ENG
IN
18:39
07-08-2024

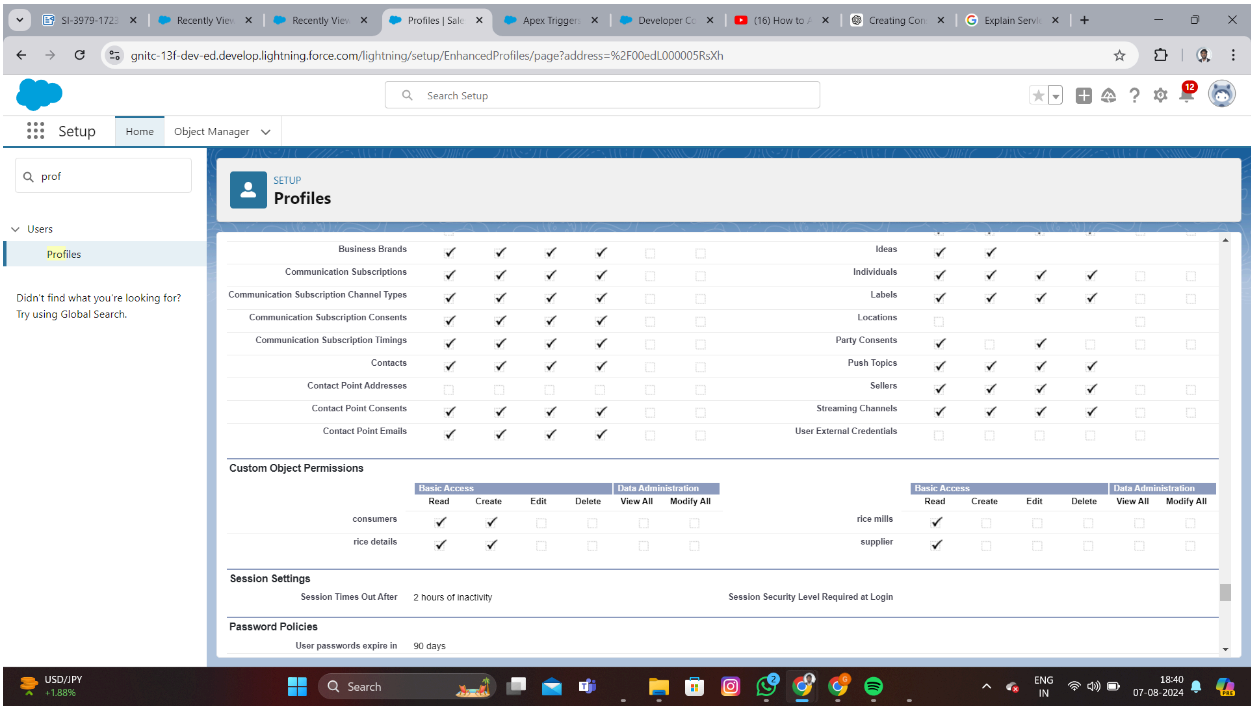
Task 22:

worker Profile

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



5. And click save.

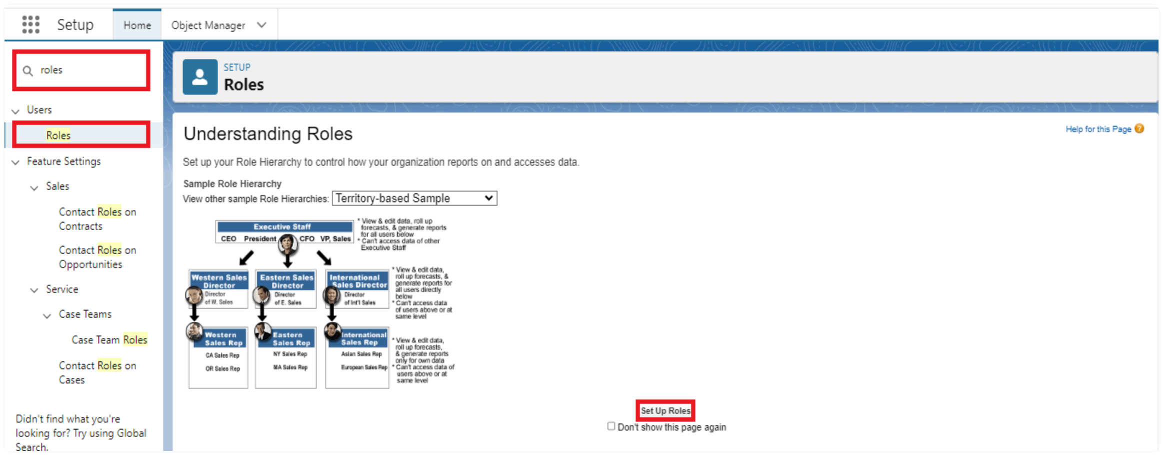

gnitc-13f-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edL000005RsXh
Search Setup
Setup
Home
Object Manager
prof
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Business Brands
Communication Subscriptions
Communication Subscription Channel Types
Communication Subscription Consents
Communication Subscription Timings
Contacts
Contact Point Addresses
Contact Point Consents
Contact Point Emails
Ideas
Individuals
Labels
Locations
Party Consents
Push Topics
Sellers
Streaming Channels
User External Credentials
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
consumers
rice details
rice mills
supplier
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
Password Policies
User passwords expire in
90 days
USD/JPY
+1.88%
Search
ENG
IN
18:40
07-08-2024

Task 23:

Creating owner Role

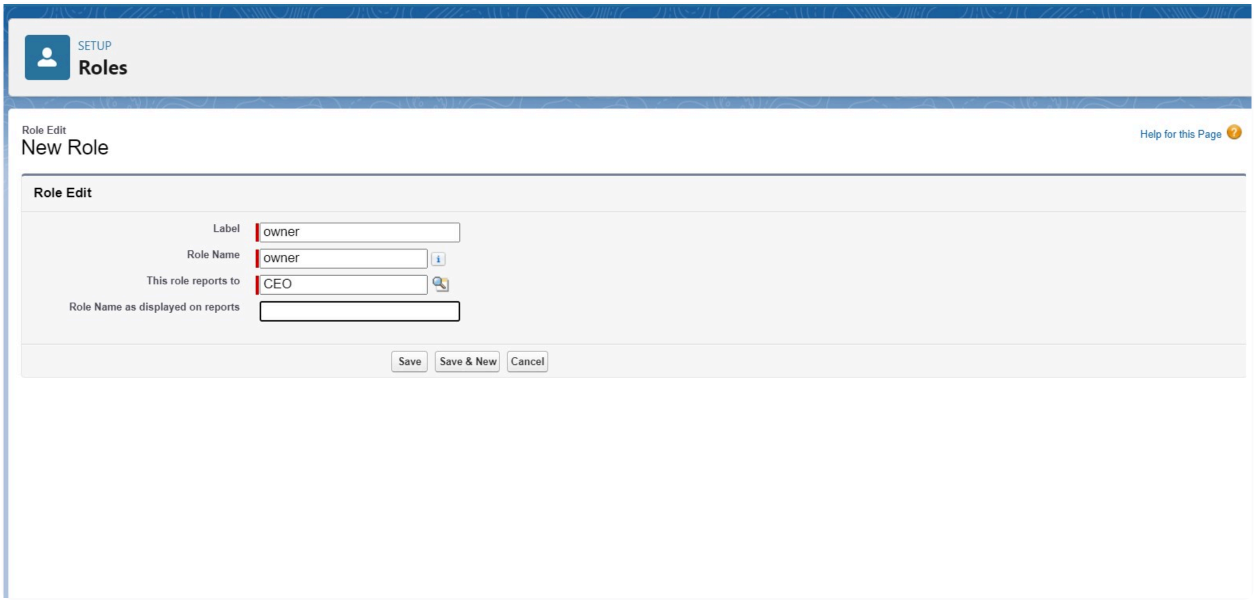
Creating owner Role:

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

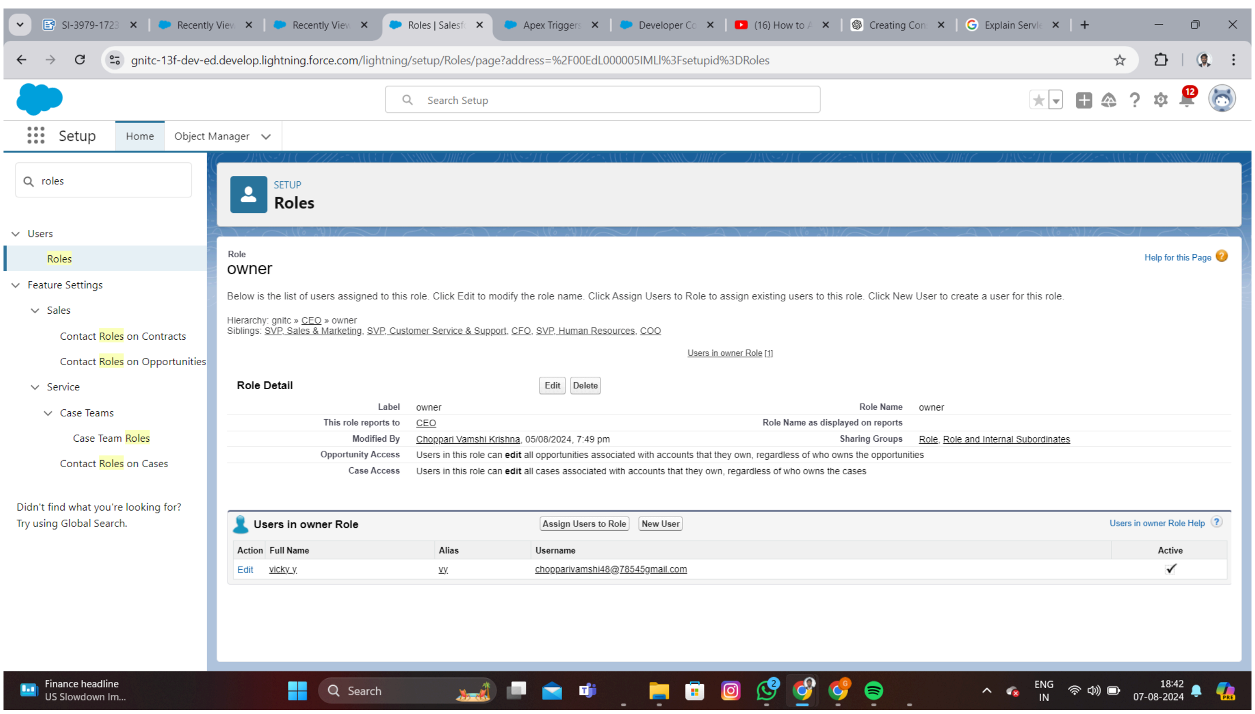


3. Click on Expand All and click on add role under whom this role works.

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



5. Click and save it.

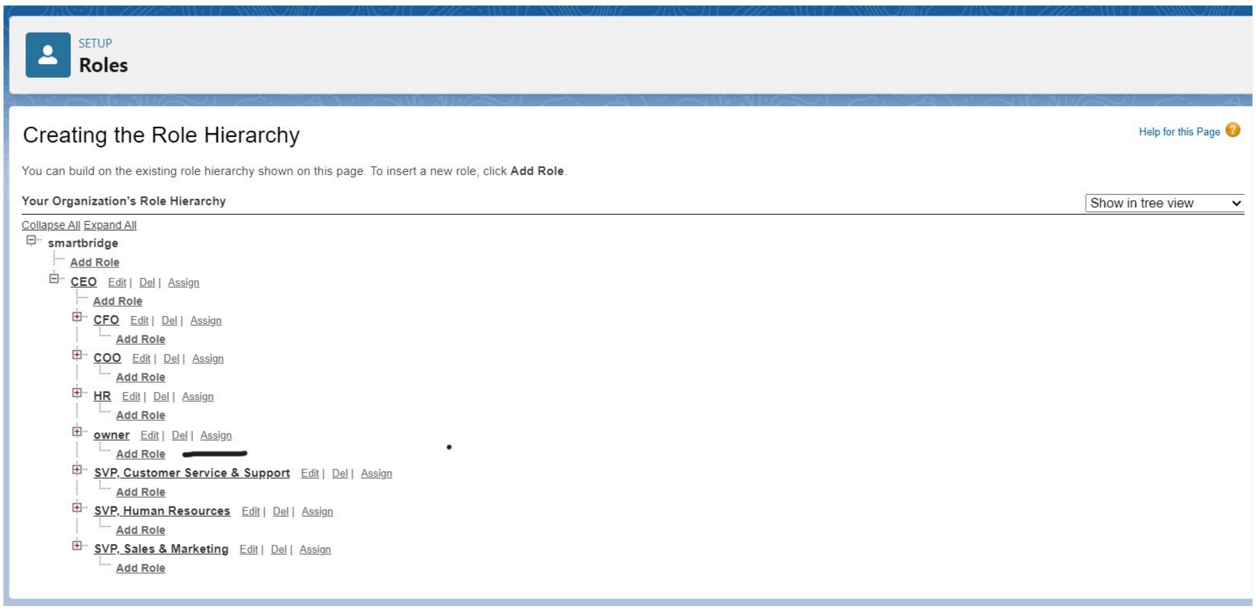


Task 24:

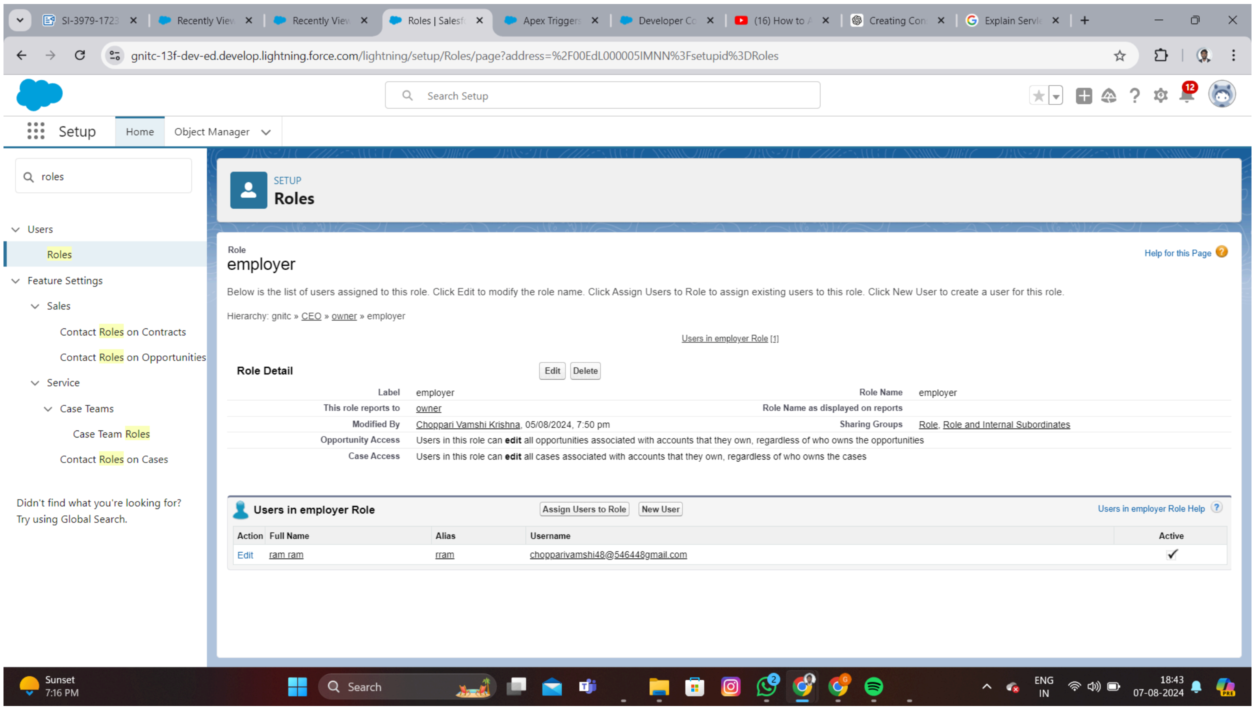
Creating employer roles

Creating another two roles under manager

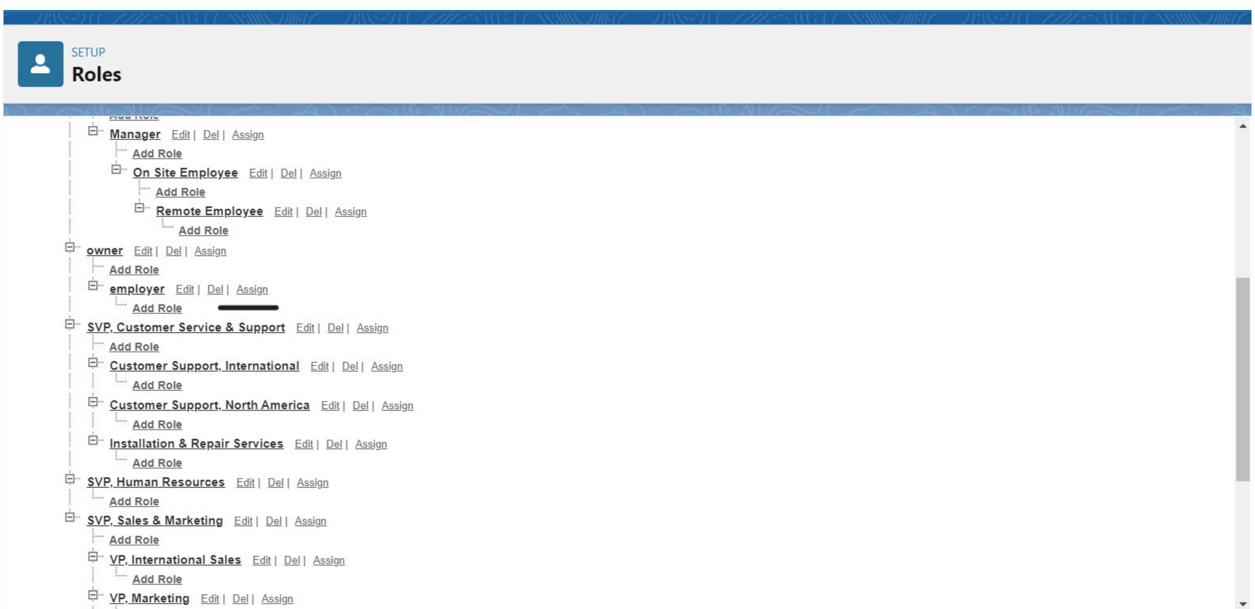
1. Go to quick find >>Search for Roles >>click on set up roles.
2. Click plus on CEO role, and click add role under owner.



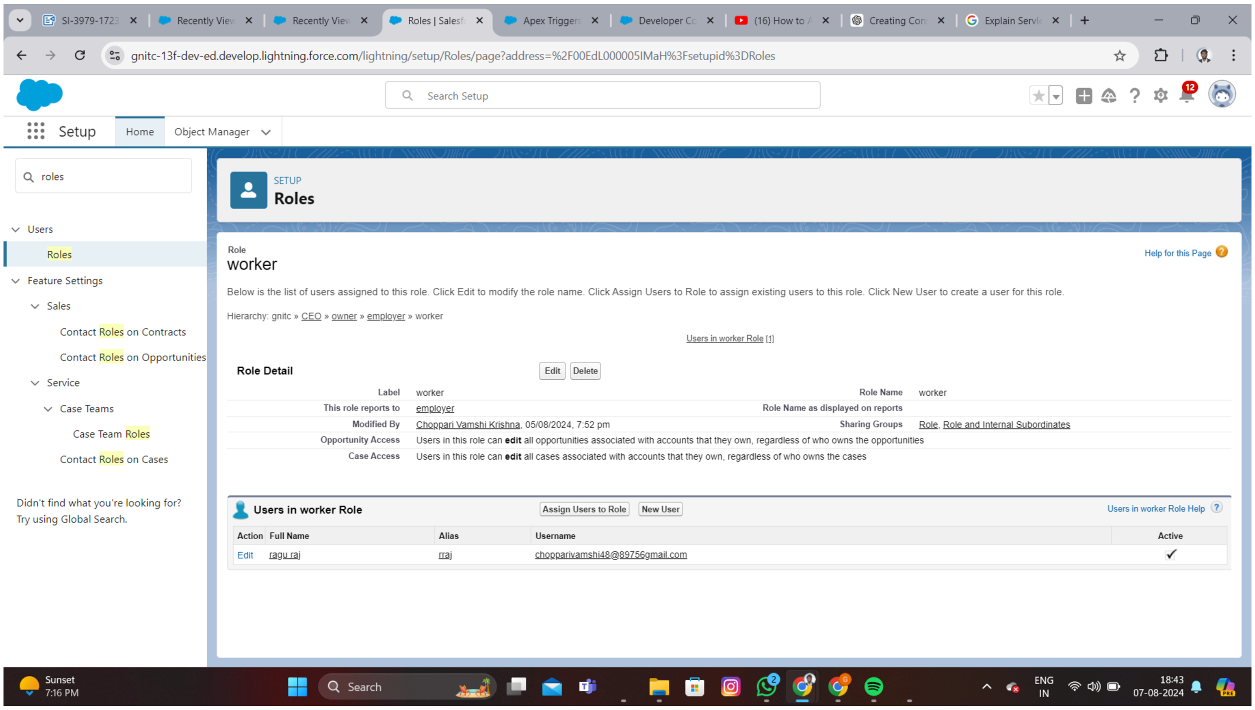
4. Give Label as “employer” and Role name gets auto populated. Then click on Save.



5. Repeat the same steps, for another role.
6. Click plus on CEO role, and click plus on owner, and click add role under employer.



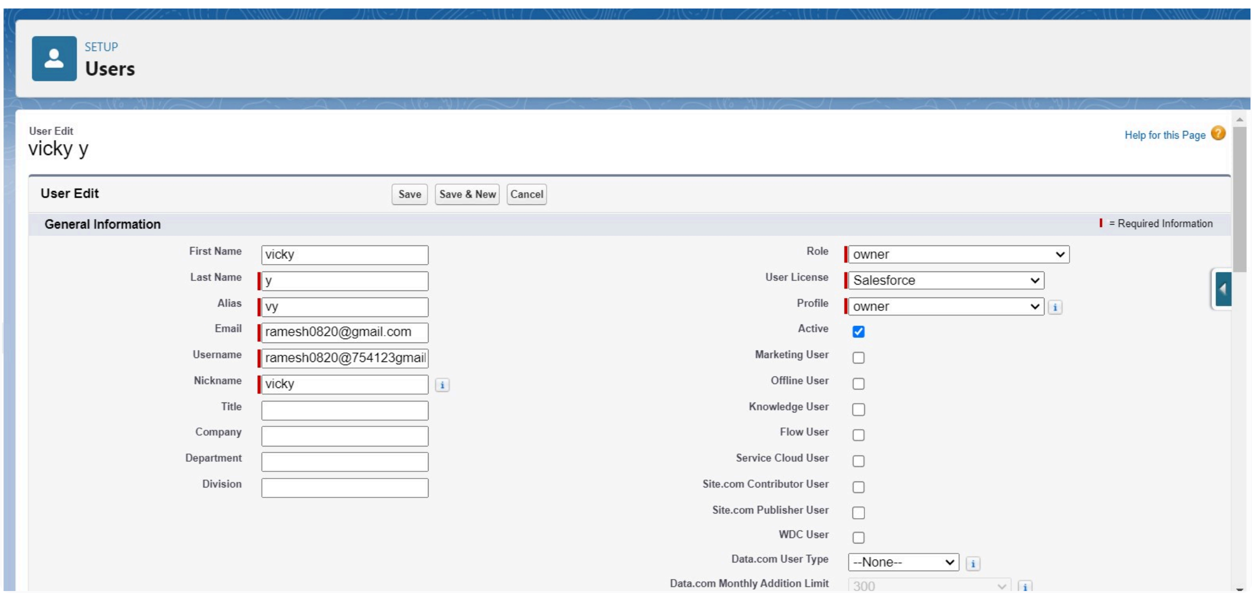
7. give Label as “worker” and Role name gets auto populated. Then click on Save.


gnitc-13f-dev-ed.develop.lightning.force.com/lightning/setup/Roles/page?address=%2F00EdL000005IMaH%3Fsetupid%3DRoles
Setup
Home
Object Manager
SETUP
Roles
Role
worker
Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.
Hierarchy: gnitc » CEO » owner » employer » worker
Role Detail
Label worker
Role Name worker
This role reports to employer
Modified By Choppari Vamshi Krishna, 05/08/2024, 7:52 pm
Sharing Groups Role, Role and Internal Subordinates
Opportunity Access Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
Case Access Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases
Users in worker Role
Action Full Name Alias Username Active
Edit ragu raj rraj chopparivamshi48@89756gmail.com

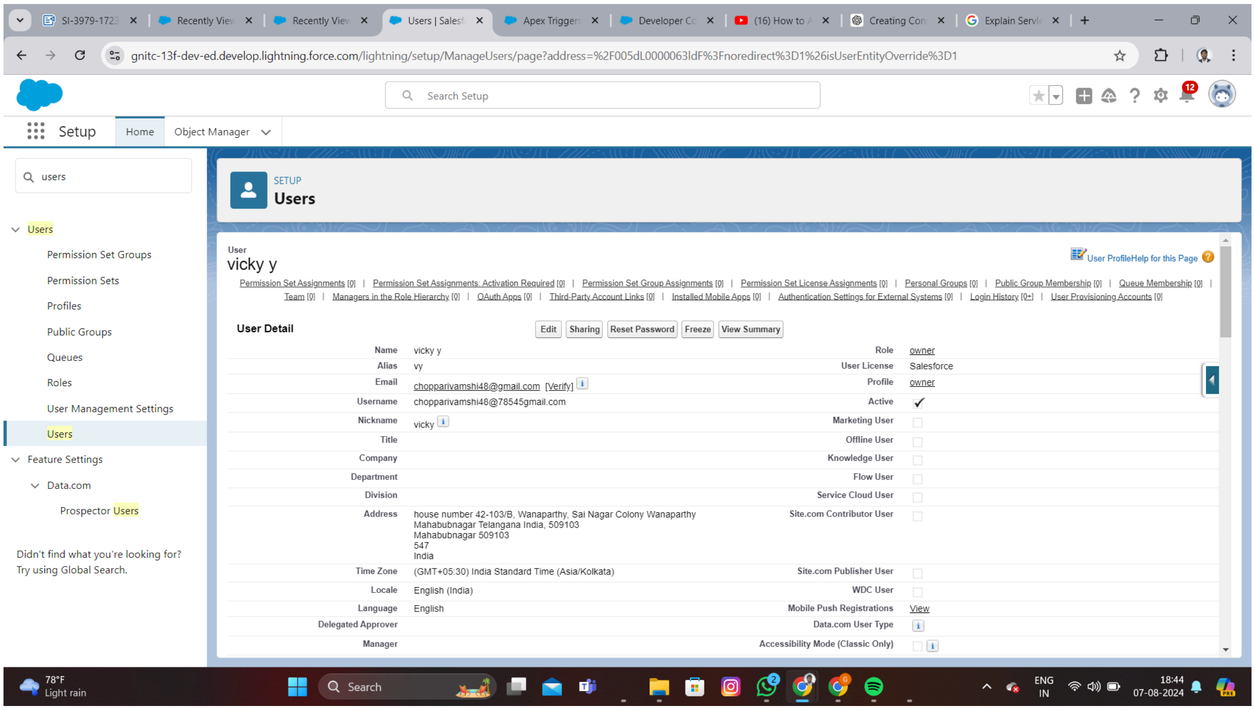
Task 25:

Create User

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



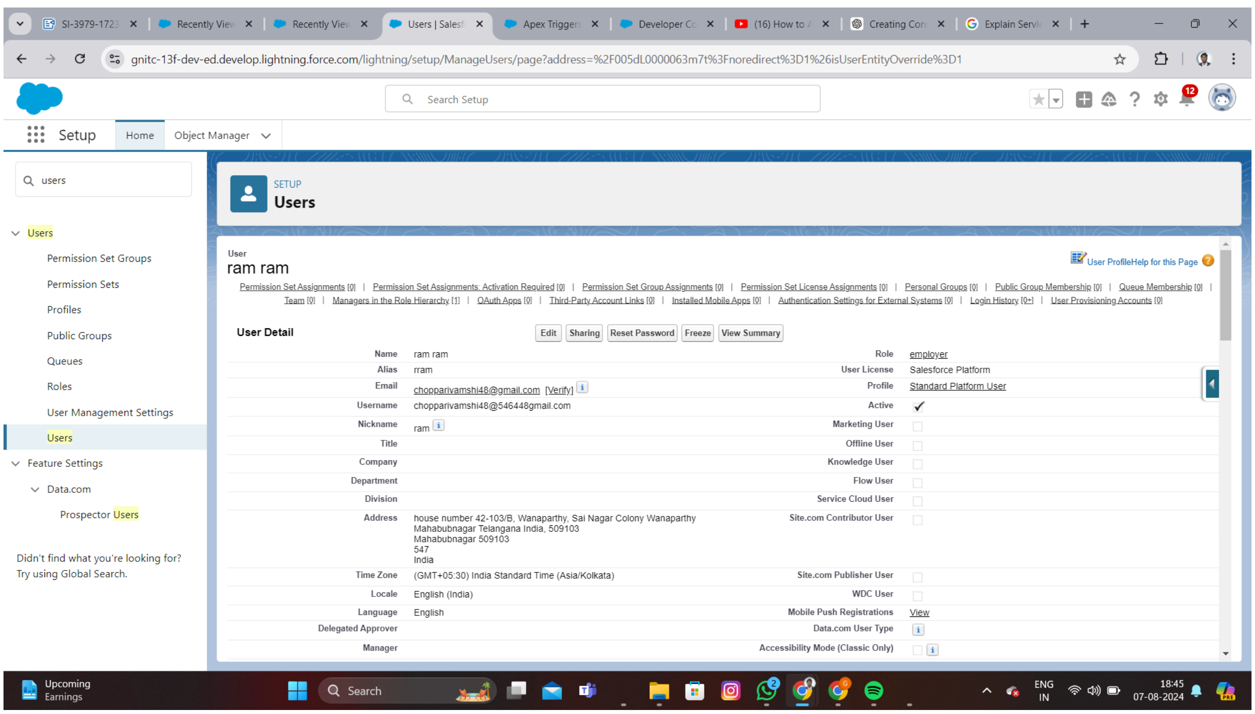
12. Save it.


gnitc-13f-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005dL0000063IdF%3Fnoredirect%3D1%26isUserEntityOverride%3D1
Search Setup
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
vicky y
User ProfileHelp 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] | Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [0+] | User Provisioning Accounts [0]
User Detail
Edit
Sharing
Reset Password
Freeze
View Summary
Name
vicky y
Role
owner
Alias
vy
User License
Salesforce
Email
chopparivamshi48@gmail.com [Verify]
Profile
owner
Username
chopparivamshi48@78545gmail.com
Active
Nickname
vicky
Marketing User
Title
Offline User
Company
Knowledge User
Department
Flow User
Division
Service Cloud User
Address
house number 42-103/B, Wanaparthy, Sai Nagar Colony Wanaparthy
Mahabubnagar Telangana India, 509103
Mahabubnagar 509103
547
India
Site.com Contributor User
Time Zone
(GMT+05:30) India Standard Time (Asia/Kolkata)
Site.com Publisher User
Locale
English (India)
WDC User
Language
English
Mobile Push Registrations
View
Delegated Approver
Data.com User Type
Manager
Accessibility Mode (Classic Only)
78°F
Light rain
Search
ENG
IN
18:44
07-08-2024

Task 26:

creating another users

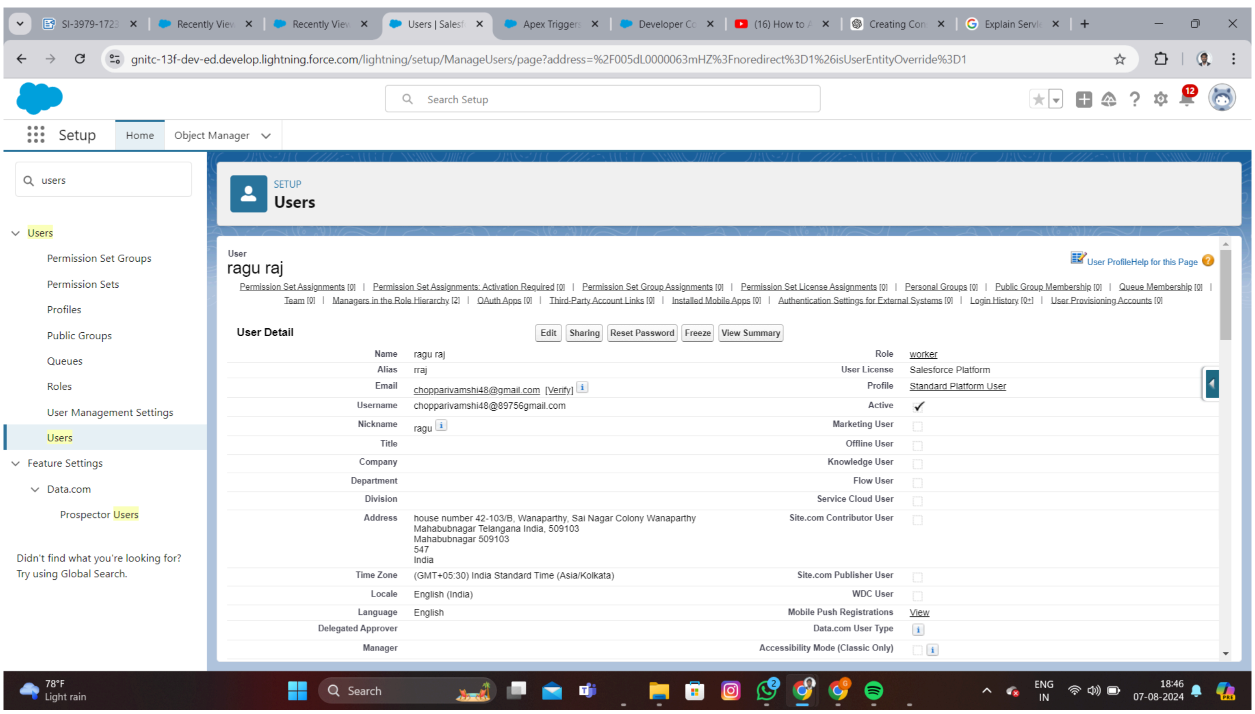
1. Go to setup ? type users in quick find box ? select users ? click New user.
2. Fill in the fields
3. First Name : ram
4. Last Name : ram
5. Alias : Give a Alias Name
6. Email id : Give your Personal Email id
7. Username : Username should be in this form: text@text.text
8. Nick Name : Give a Nickname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



Task 27:

Create Another User

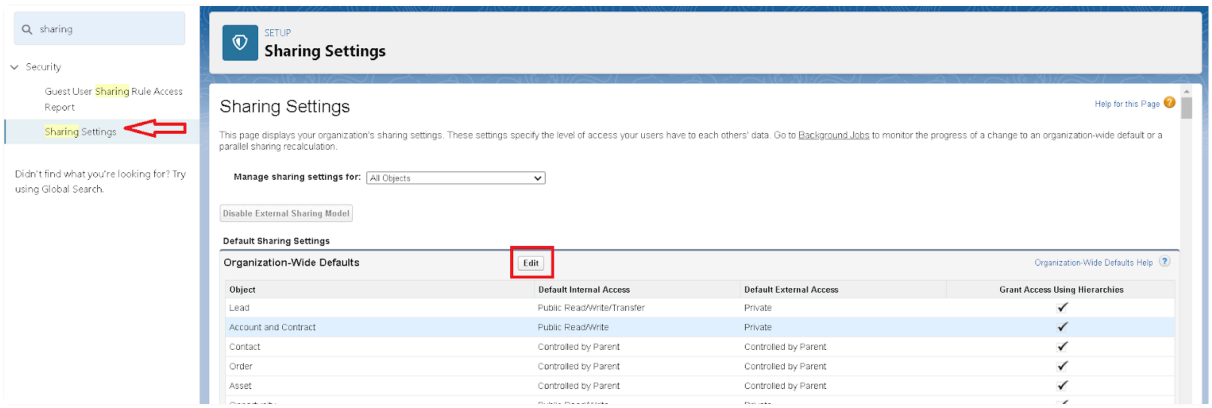
1. Go to setup ? type users in quick find box ? select users ? click New user.
2. Fill in the fields
3. First Name : ragu
4. Last Name : raj
5. Alias : Give a Alias Name
6. Email id : Give your Personal Email id
7. Username : Username should be in this form: text@text.text
8. Nick Name : Give a Nickname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



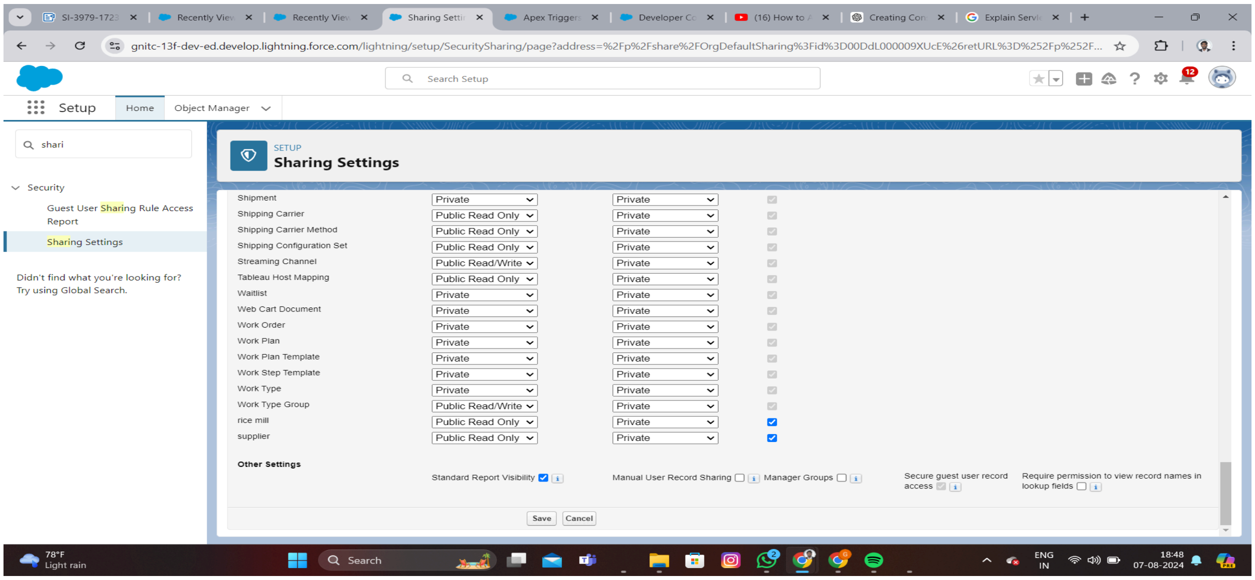
Task 28:

Creating OWD setting.

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



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



gnitc-13f-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/page?address=%2Fp%2Fshare%2FOrgDefaultSharing%3Fid%3D00DdL000009XUcE%26retURL%3D%252Fp%252F...
Search Setup
Setup
Home
Object Manager
shari
Security
Guest User Sharing Rule Access Report
Sharing Settings
Didn't find what you're looking for? Try using Global Search.
SETUP
Sharing Settings
Shipment Private Private
Shipping Carrier Public Read Only Private
Shipping Carrier Method Public Read Only Private
Shipping Configuration Set Public Read Only Private
Streaming Channel Public Read/Write Private
Tableau Host Mapping Public Read Only Private
Waitlist Private Private
Web Cart Document Private Private
Work Order Private Private
Work Plan Private Private
Work Plan Template Private Private
Work Step Template Private Private
Work Type Private Private
Work Type Group Public Read/Write Private
rice mill Public Read Only Private
supplier Public Read Only Private
Other Settings
Standard Report Visibility
Manual User Record Sharing
Manager Groups
Secure guest user record access
Require permission to view record names in lookup fields
Save
Cancel
78°F
Light rain
Search
ENG
IN
18:48
07-08-2024

Task 29:

Create Report

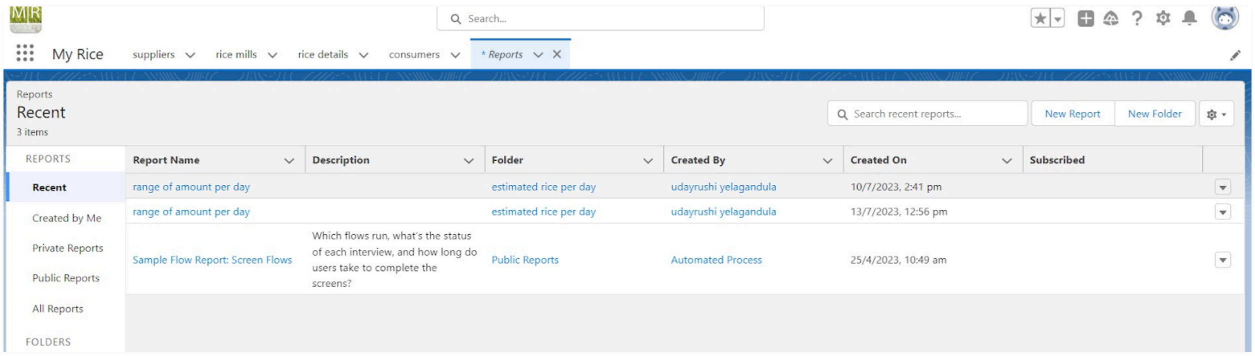
Note : Before creating a report, create the latest “10” records in consumer objects.

Try to fill every field in each record for better experience.

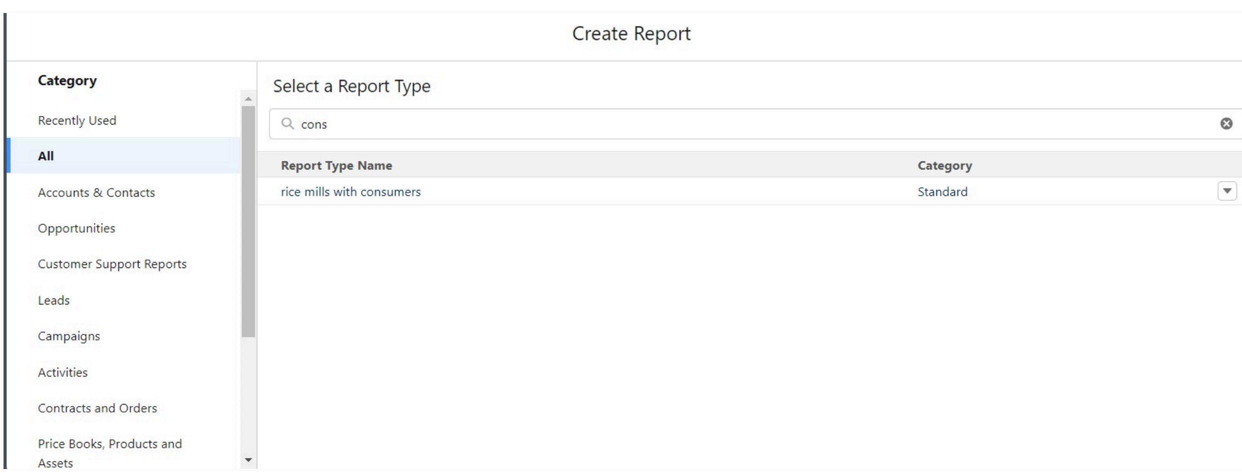
To create Records : Click on consumers tab >> click on New >> Enter the details and click on Save.

Repeat these steps to create "10" records.

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



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



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

1.consumer name

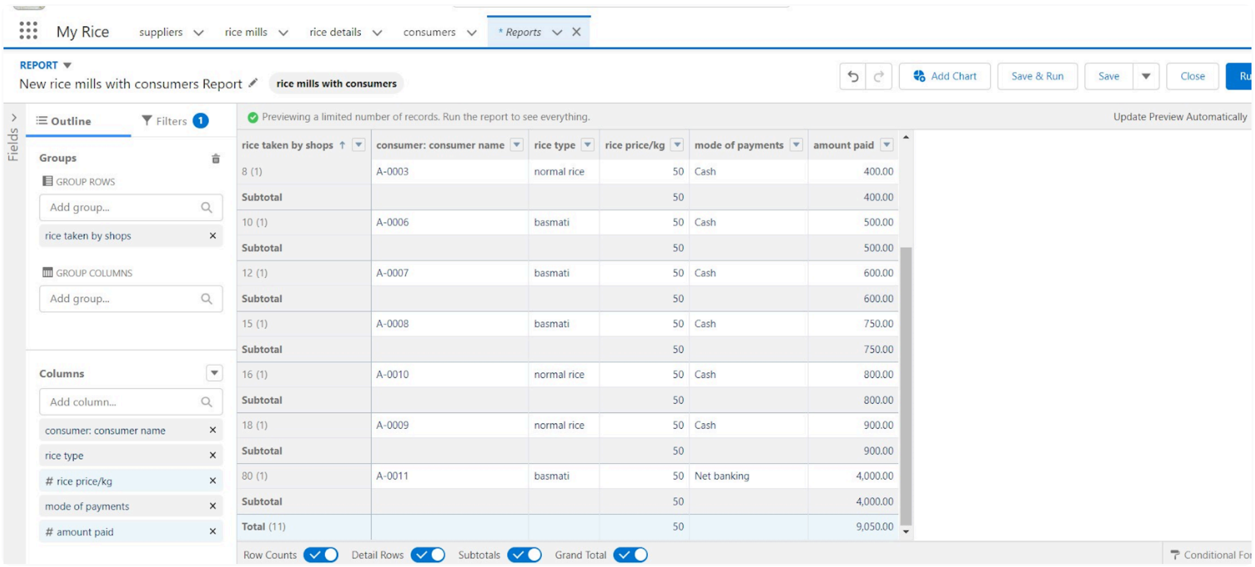
2.rice type

3.rice price/kg

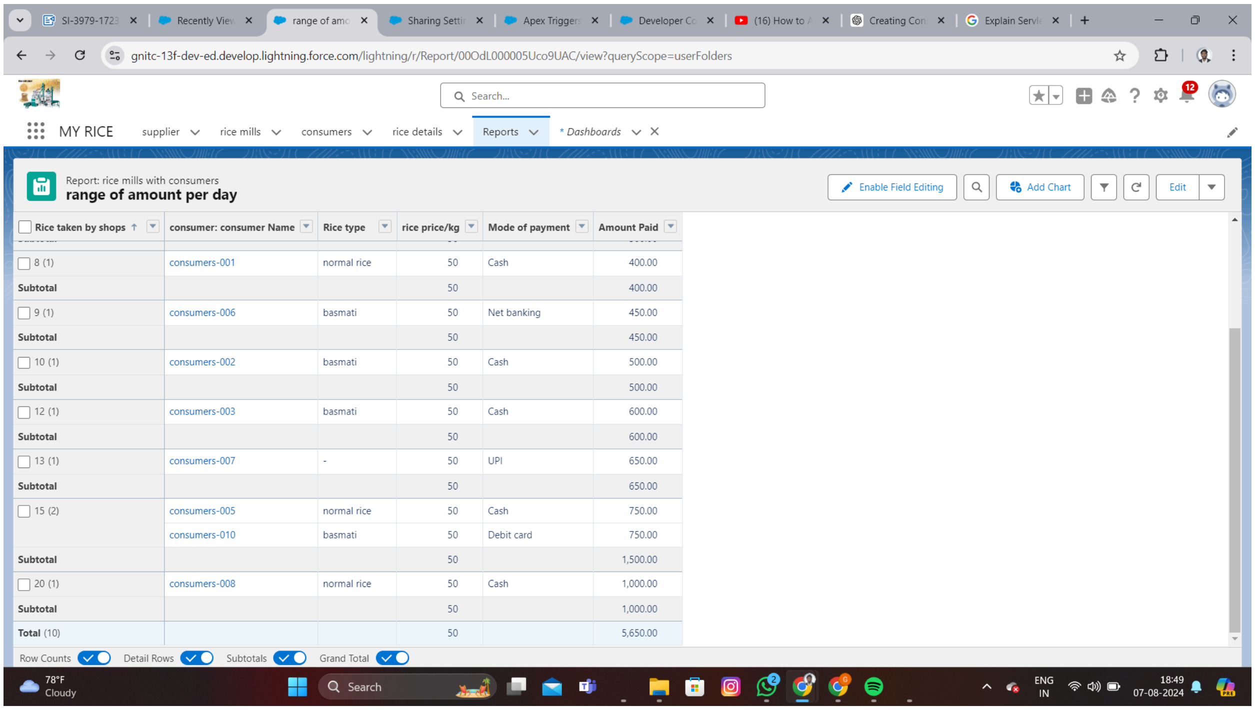
4.mode of payments

5.amount paid

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



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


gnitc-13f-dev-ed.develop.lightning.force.com/lightning/r/Report/00OdL000005Uco9UAC/view?queryScope=userFolders

MY RICE | supplier | rice mills | consumers | rice details | Reports | * Dashboards

Report: rice mills with consumers

range of amount per day

Enable Field Editing | Add Chart | Edit

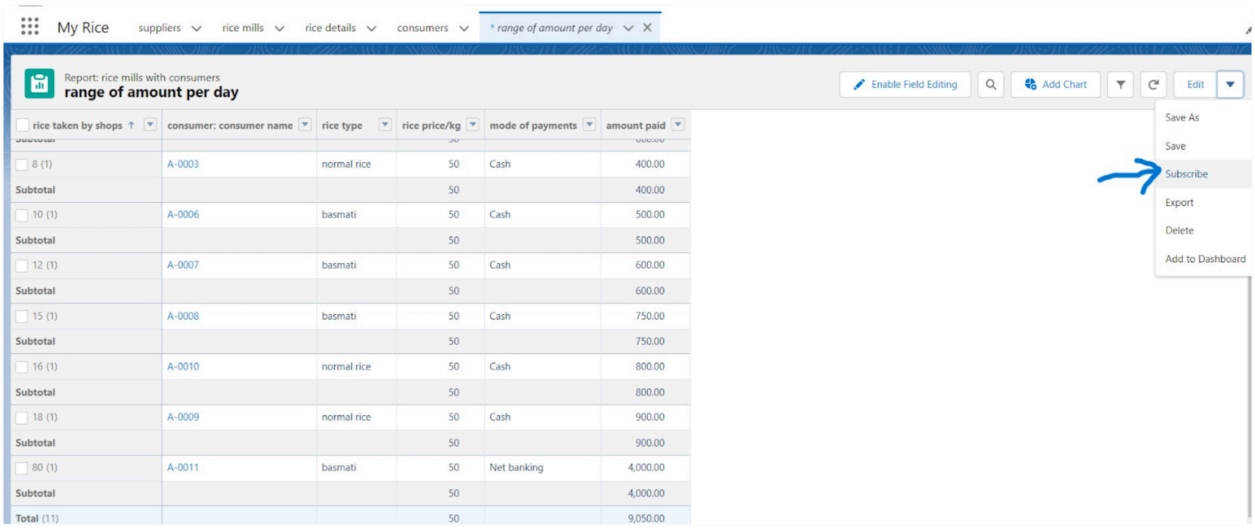
Rice taken by shops	consumer: consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
8 (1)	consumers-001	normal rice	50	Cash	400.00
Subtotal			50		400.00
9 (1)	consumers-006	basmati	50	Net banking	450.00
Subtotal			50		450.00
10 (1)	consumers-002	basmati	50	Cash	500.00
Subtotal			50		500.00
12 (1)	consumers-003	basmati	50	Cash	600.00
Subtotal			50		600.00
13 (1)	consumers-007	-	50	UPI	650.00
Subtotal			50		650.00
15 (2)	consumers-005	normal rice	50	Cash	750.00
	consumers-010	basmati	50	Debit card	750.00
Subtotal			50		1,500.00
20 (1)	consumers-008	normal rice	50	Cash	1,000.00
Subtotal			50		1,000.00
Total (10)			50		5,650.00

Row Counts | Detail Rows | Subtotals | Grand Total

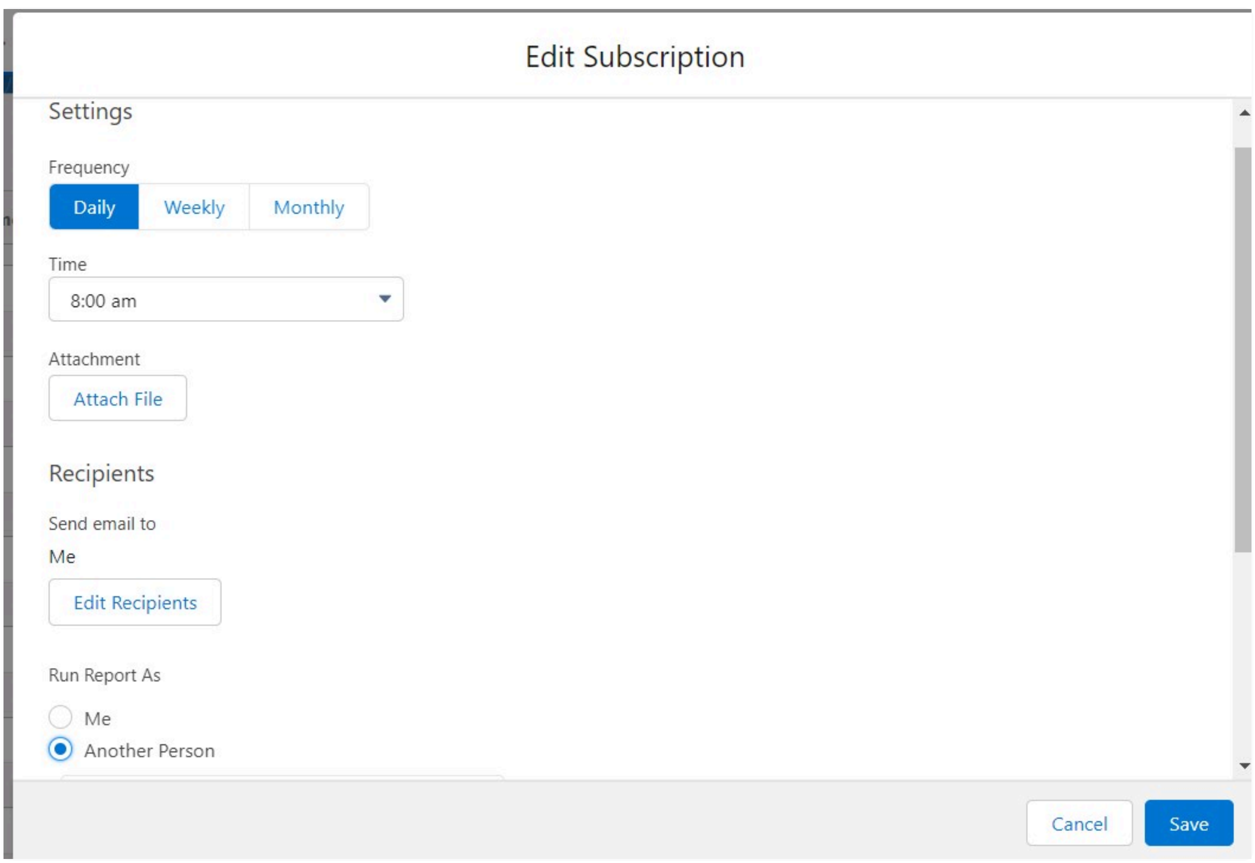
Task 30:

Sharing report to owner

1. Click edit drop down and select subscribe option

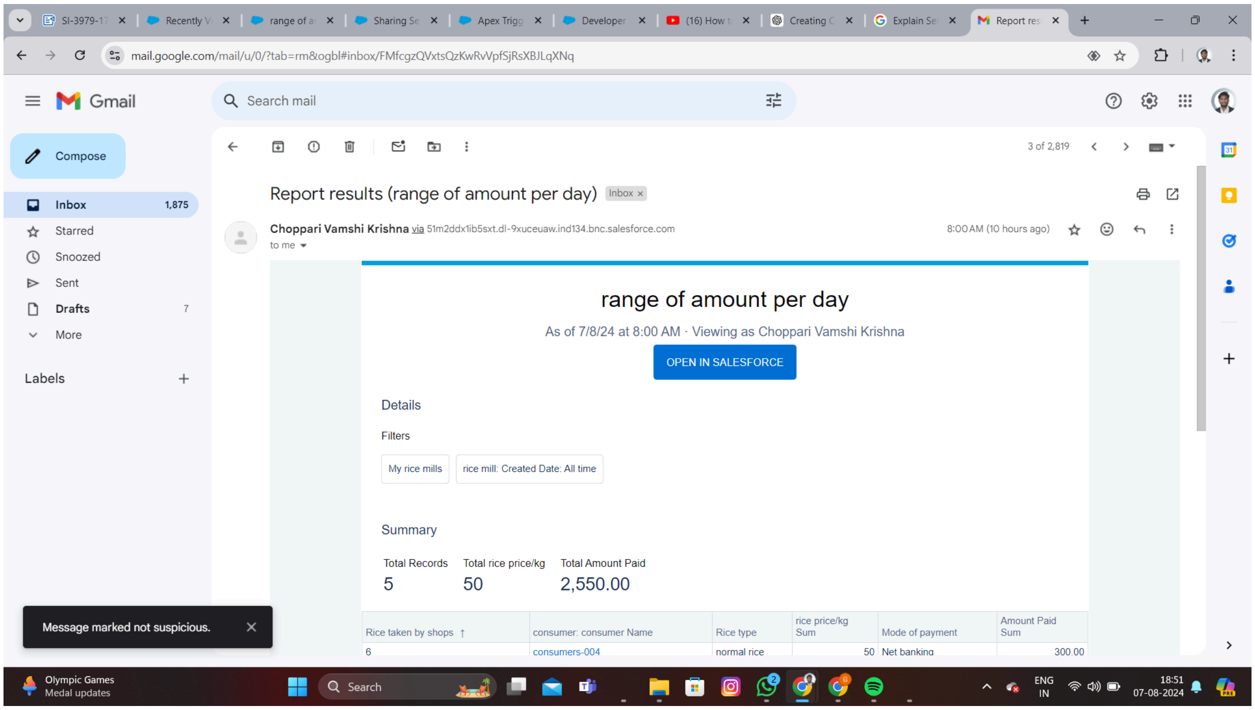


2. Follow as per below image.



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

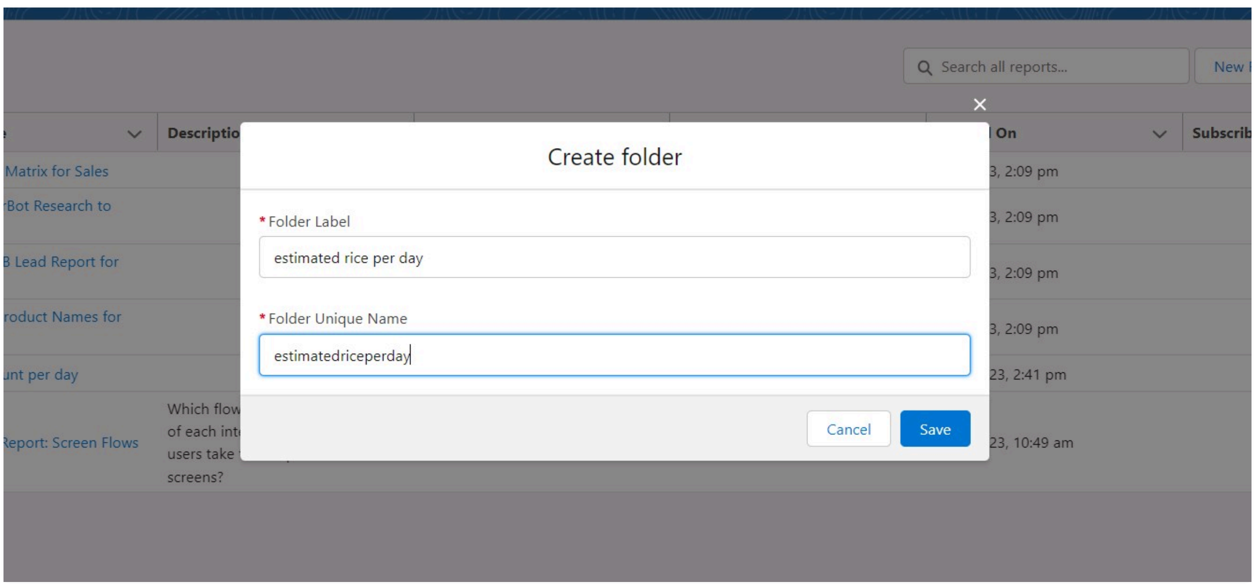
NOTE: The owner gets daily email notification of that rice mill report.so that he can see all data remotely as shown below..



Task 31:

create a report folder

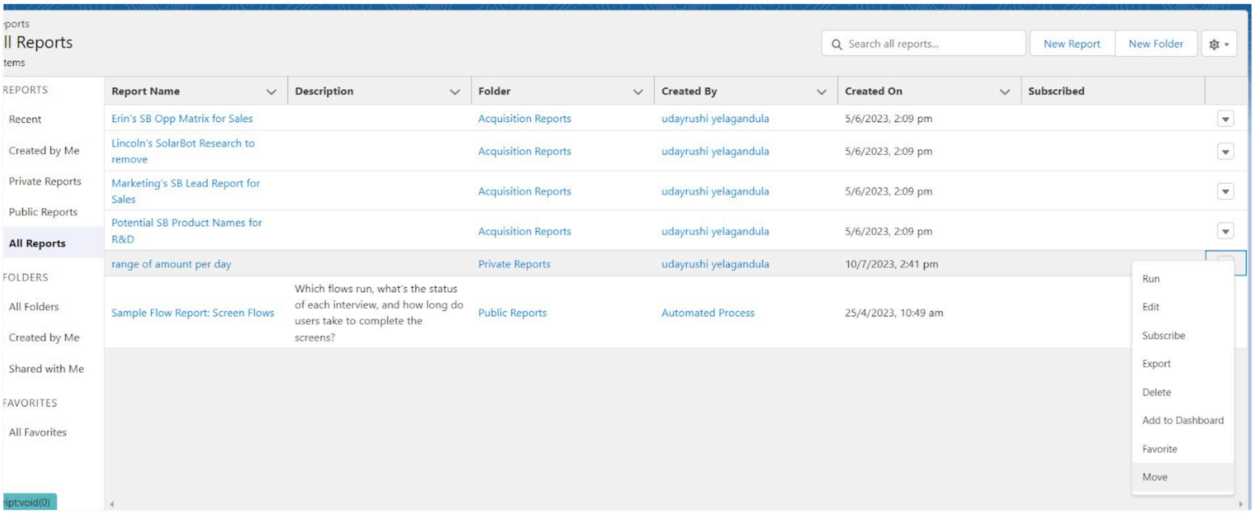
1. Click on the app launcher and search for reports.
2. Double click on the report, " reports tab" will be auto populated in the navigation bar.
3. Click on the report tab, click on the new folder.
4. Give the Folder label as "estimated rice per day ", Folder unique name will be auto populated.
5. Click save.



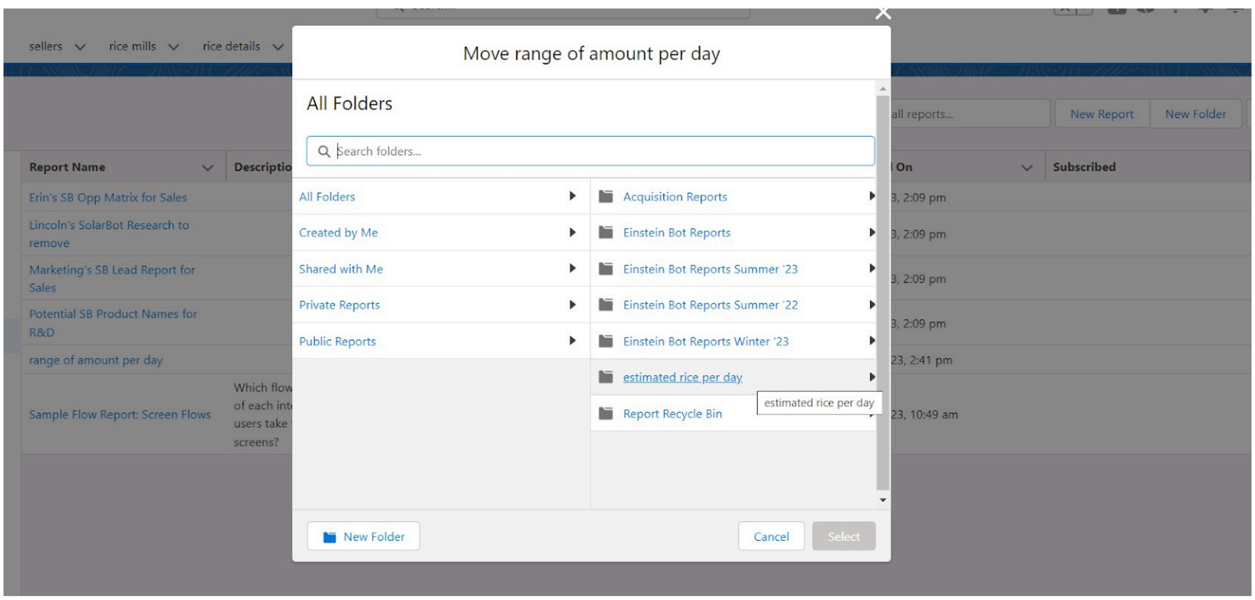
1.navigate to app launcher and click reports on that.

2.click all reports.

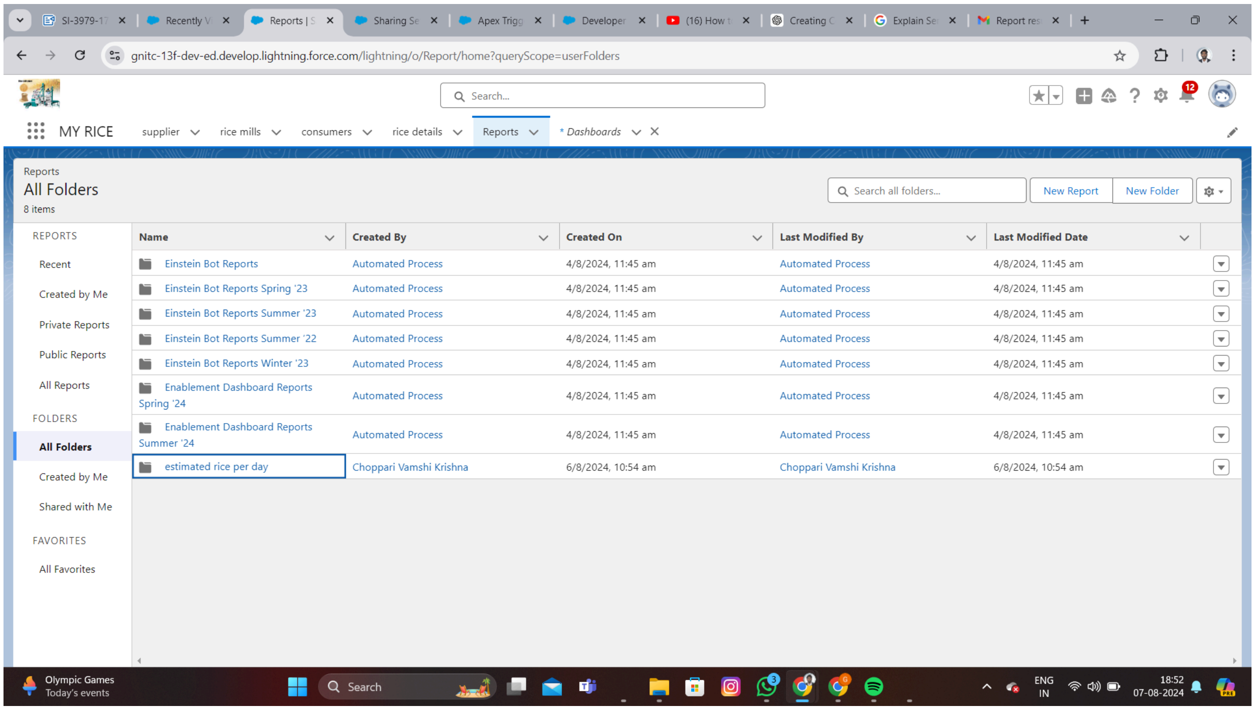
3. Select the range of amount per day drop down in that click move.

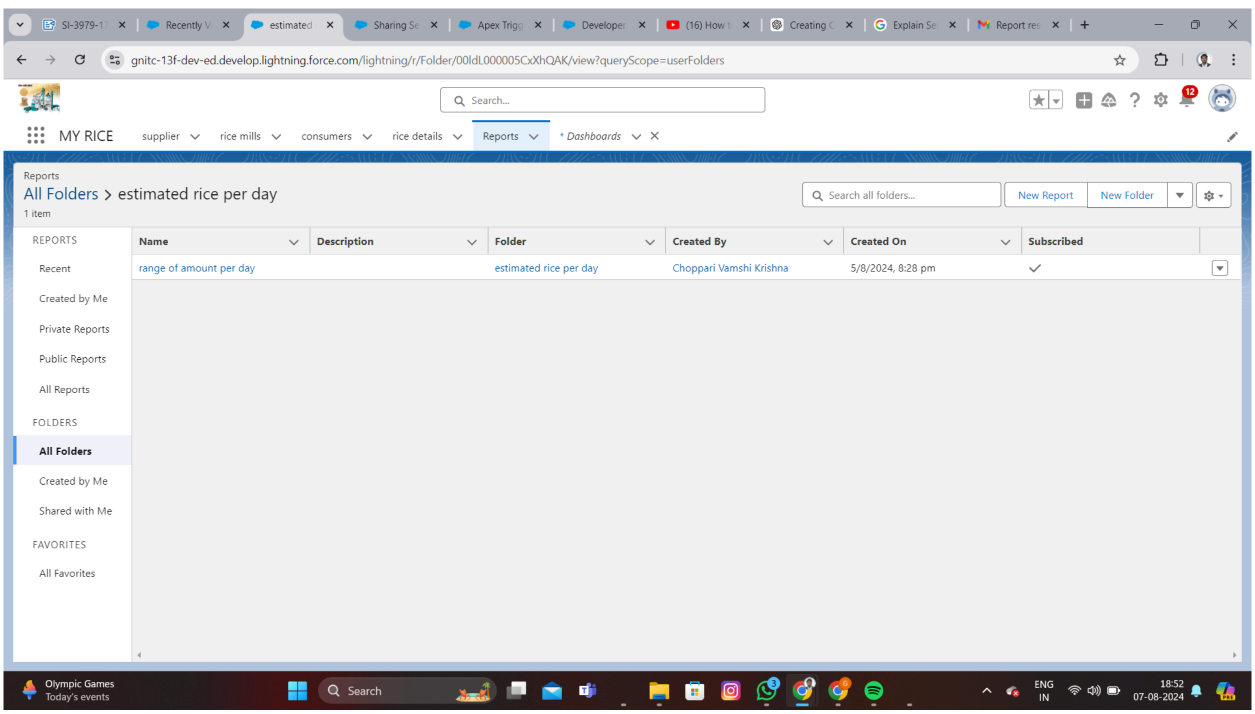


5. Select estimated rice per day folder and select folder.



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.

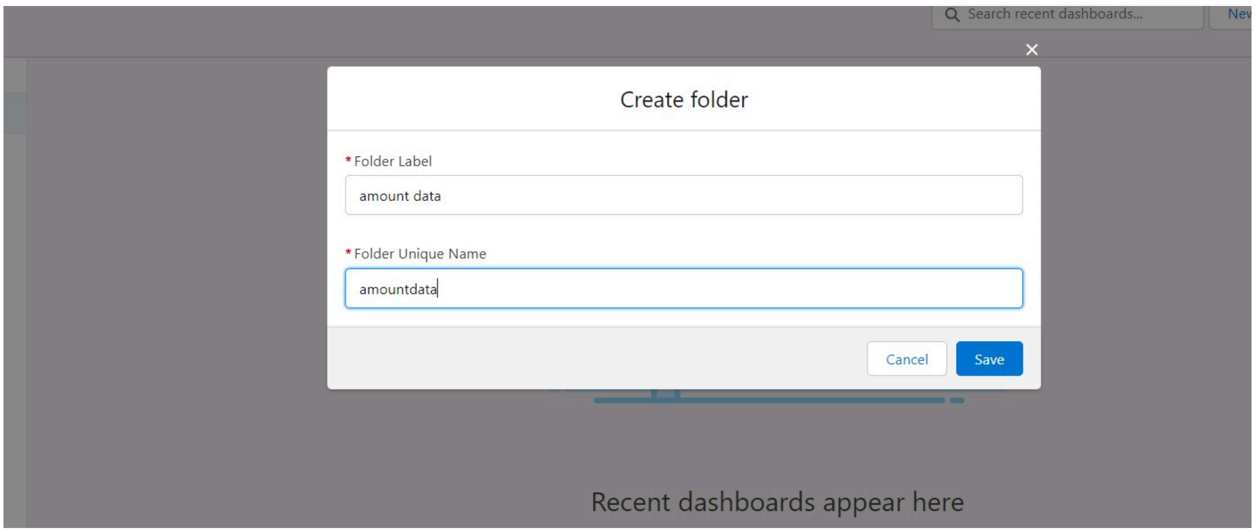

gnitc-13f-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=userFolders
MY RICE
supplier
rice mills
consumers
rice details
Reports
* Dashboards
Reports
All Folders
8 items
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Name	Created By	Created On	Last Modified By	Last Modified Date
Einstein Bot Reports	Automated Process	4/8/2024, 11:45 am	Automated Process	4/8/2024, 11:45 am
Einstein Bot Reports Spring '23	Automated Process	4/8/2024, 11:45 am	Automated Process	4/8/2024, 11:45 am
Einstein Bot Reports Summer '23	Automated Process	4/8/2024, 11:45 am	Automated Process	4/8/2024, 11:45 am
Einstein Bot Reports Summer '22	Automated Process	4/8/2024, 11:45 am	Automated Process	4/8/2024, 11:45 am
Einstein Bot Reports Winter '23	Automated Process	4/8/2024, 11:45 am	Automated Process	4/8/2024, 11:45 am
Enablement Dashboard Reports Spring '24	Automated Process	4/8/2024, 11:45 am	Automated Process	4/8/2024, 11:45 am
Enablement Dashboard Reports Summer '24	Automated Process	4/8/2024, 11:45 am	Automated Process	4/8/2024, 11:45 am
estimated rice per day	Choppari Vamshi Krishna	6/8/2024, 10:54 am	Choppari Vamshi Krishna	6/8/2024, 10:54 am
18:52
07-08-2024


gnitc-13f-dev-ed.develop.lightning.force.com/lightning/r/Folder/00ldL000005CxXhQAK/view?queryScope=userFolders
MY RICE
Reports
All Folders > estimated rice per day
1 item
New Report
New Folder
Name	Description	Folder	Created By	Created On	Subscribed
range of amount per day		estimated rice per day	Choppari Vamshi Krishna	5/8/2024, 8:28 pm	✓
18:52
07-08-2024

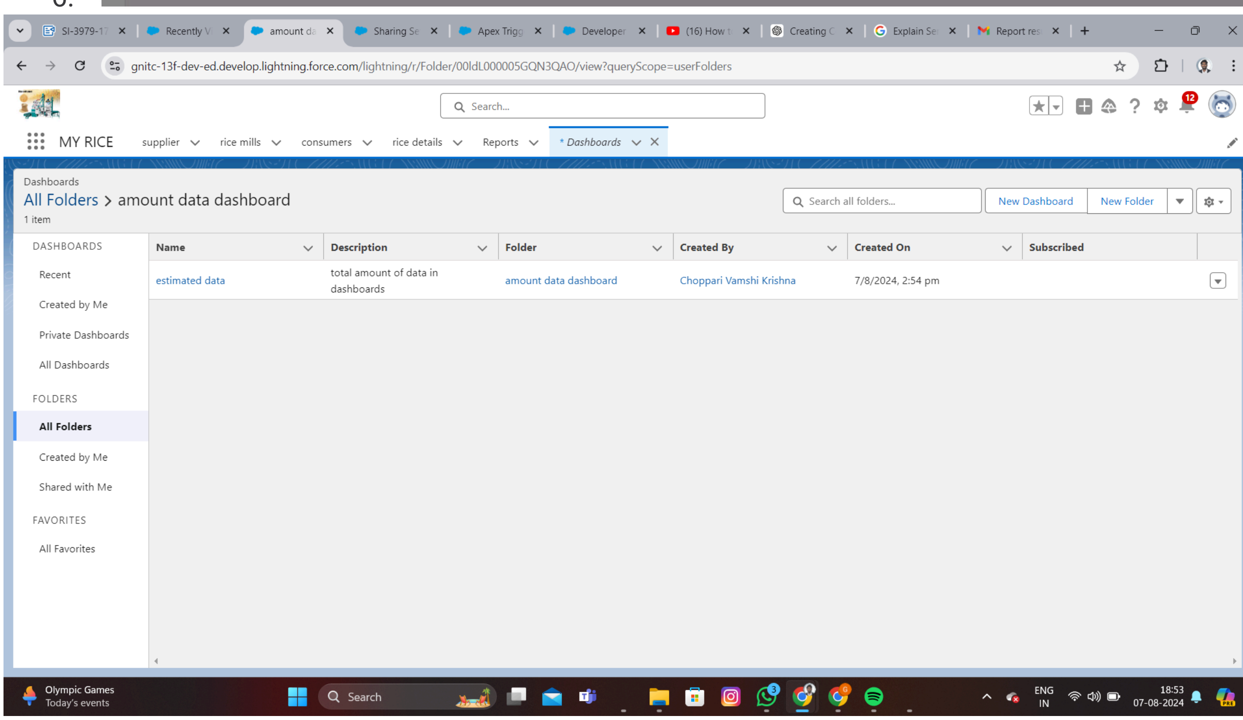
Task 32:

Create Dashboard Folder

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



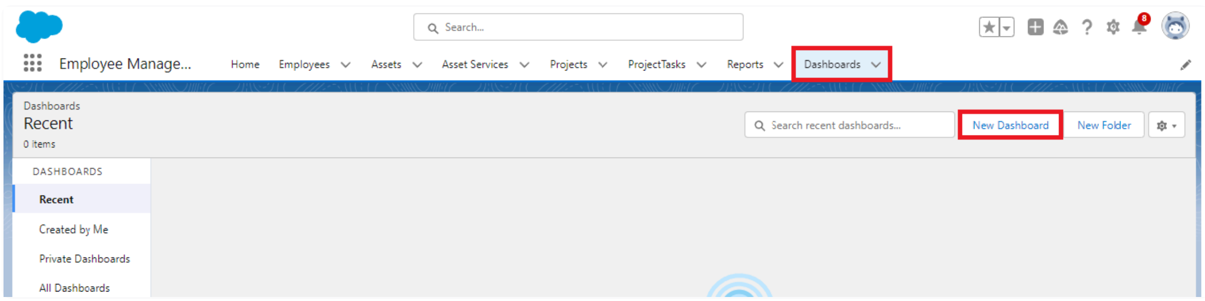
6.



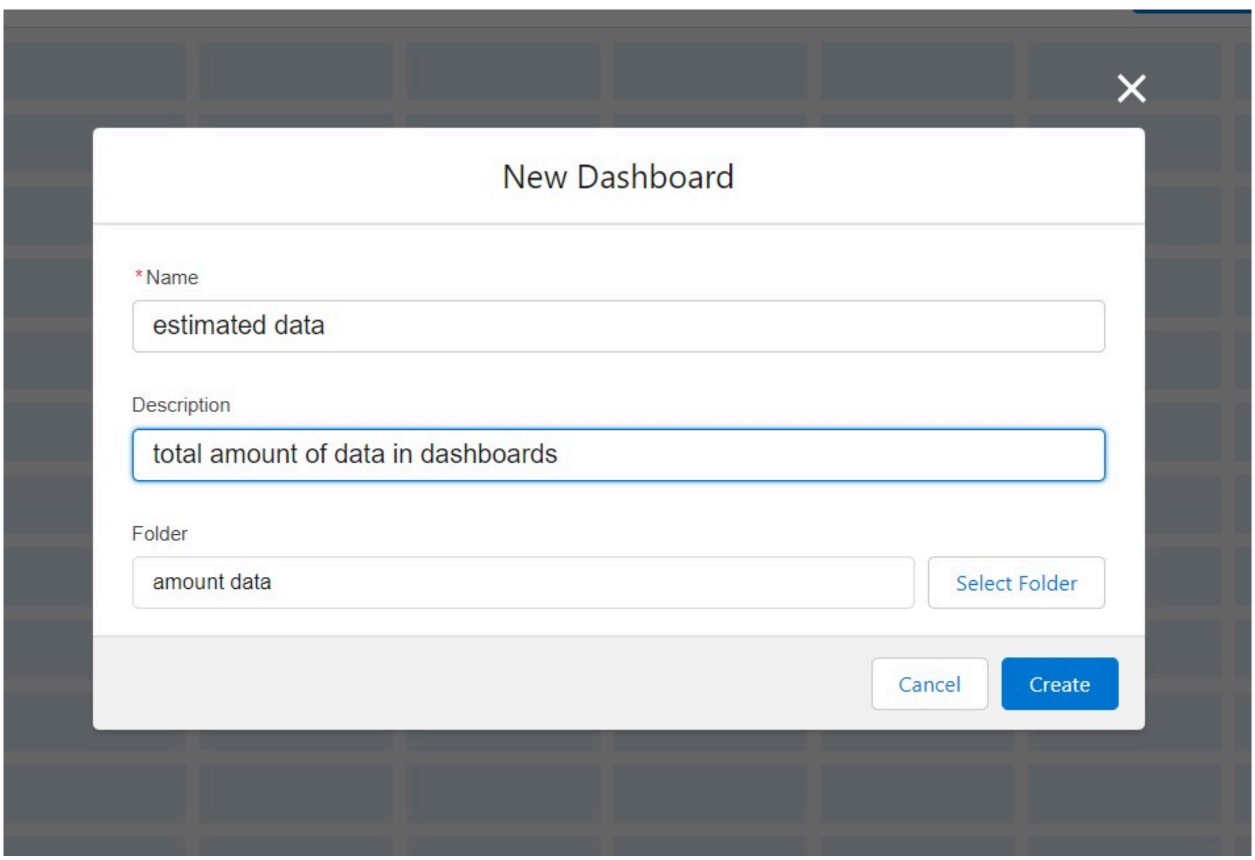
Task 33:

Create Dashboard

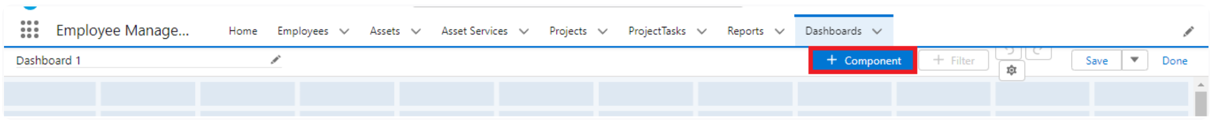
1. Go to the app >> click on the Dashboards tabs.



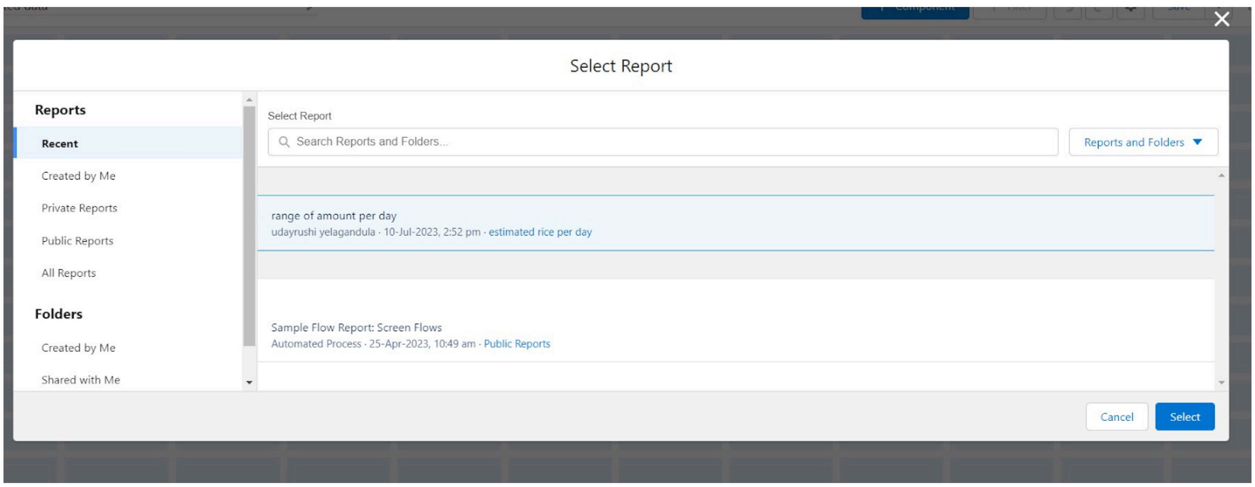
2. Give a Name and select the folder that was created, and click on create.



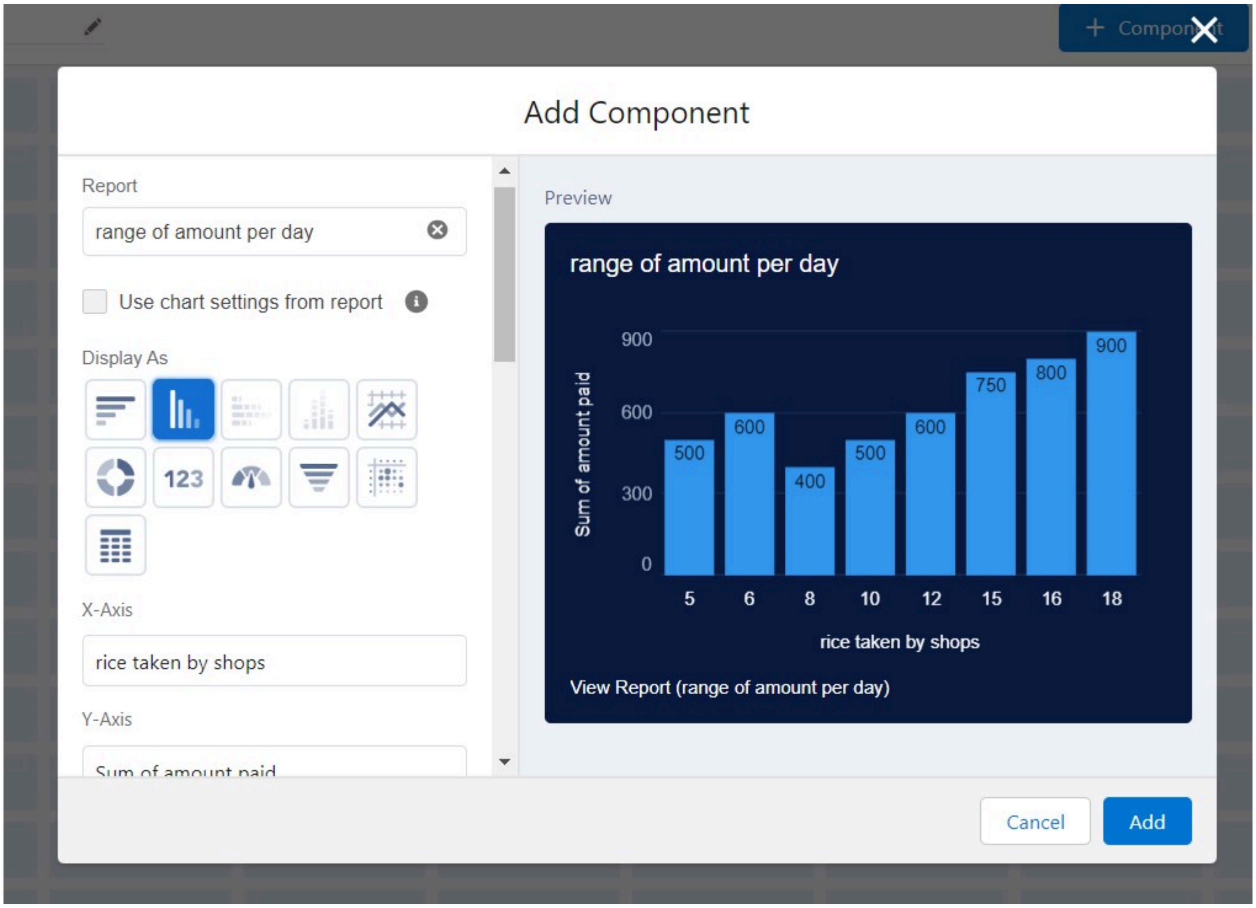
1. Select add component.



1. Select a Report and click on select.



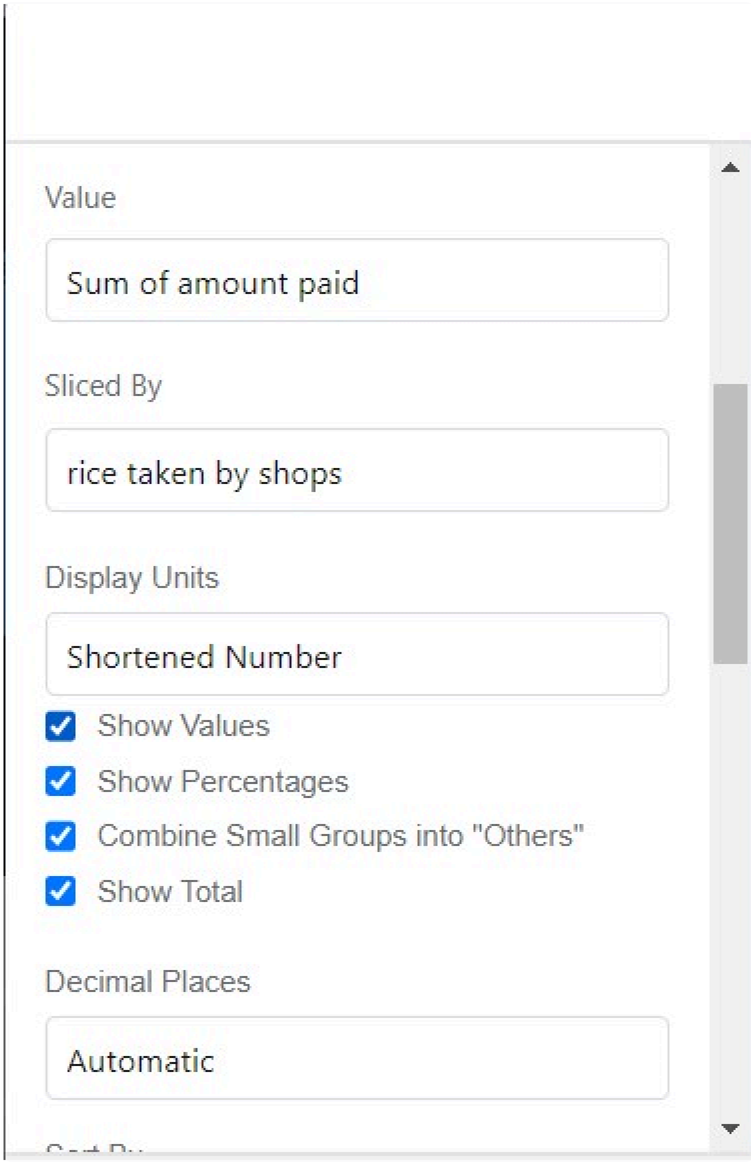
1. Preview is shown below.



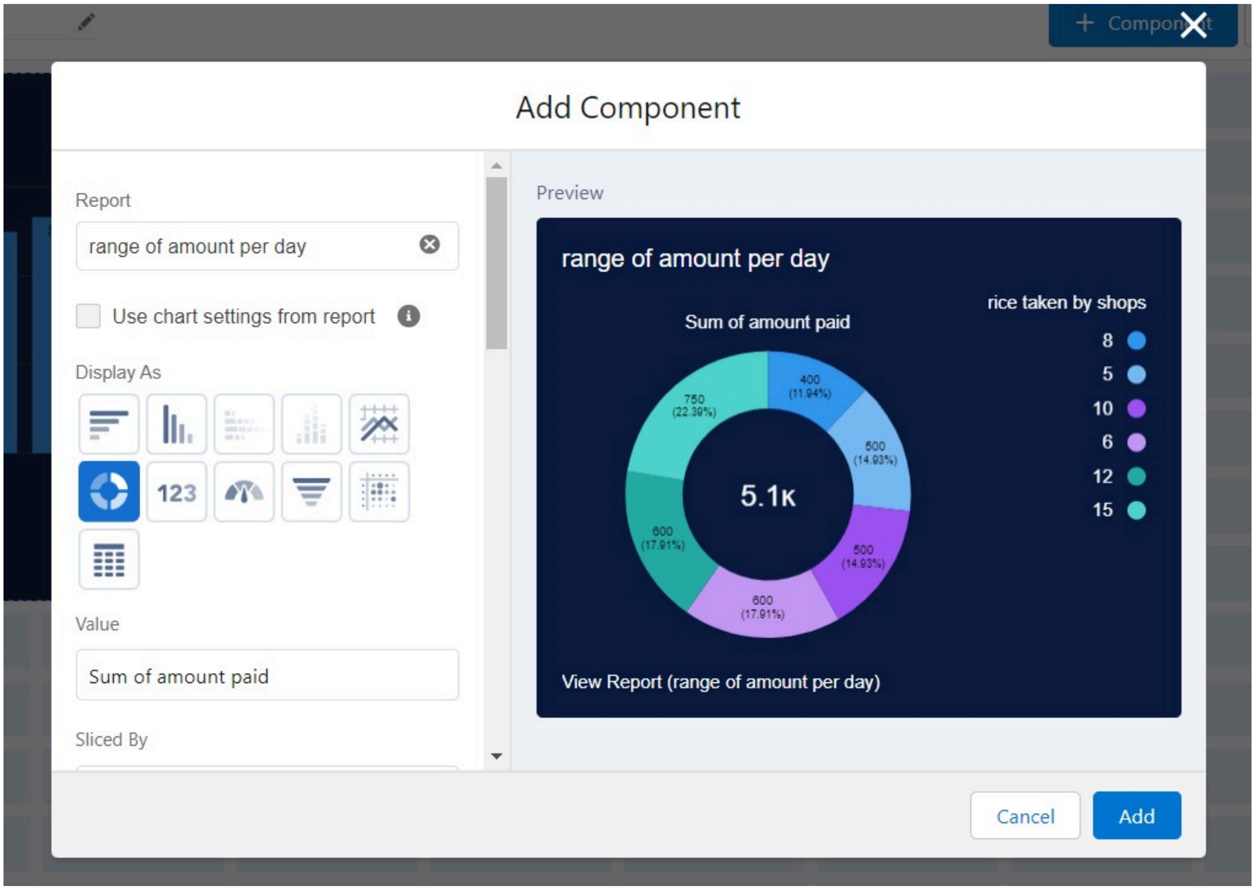
Display as>> vertical bar chart
X-axis >> rice taken by shops
Y-axis >> sum of amount
Y-axis range >> automatic
Sort by >> rice taken by shops
Component theme >> dark.

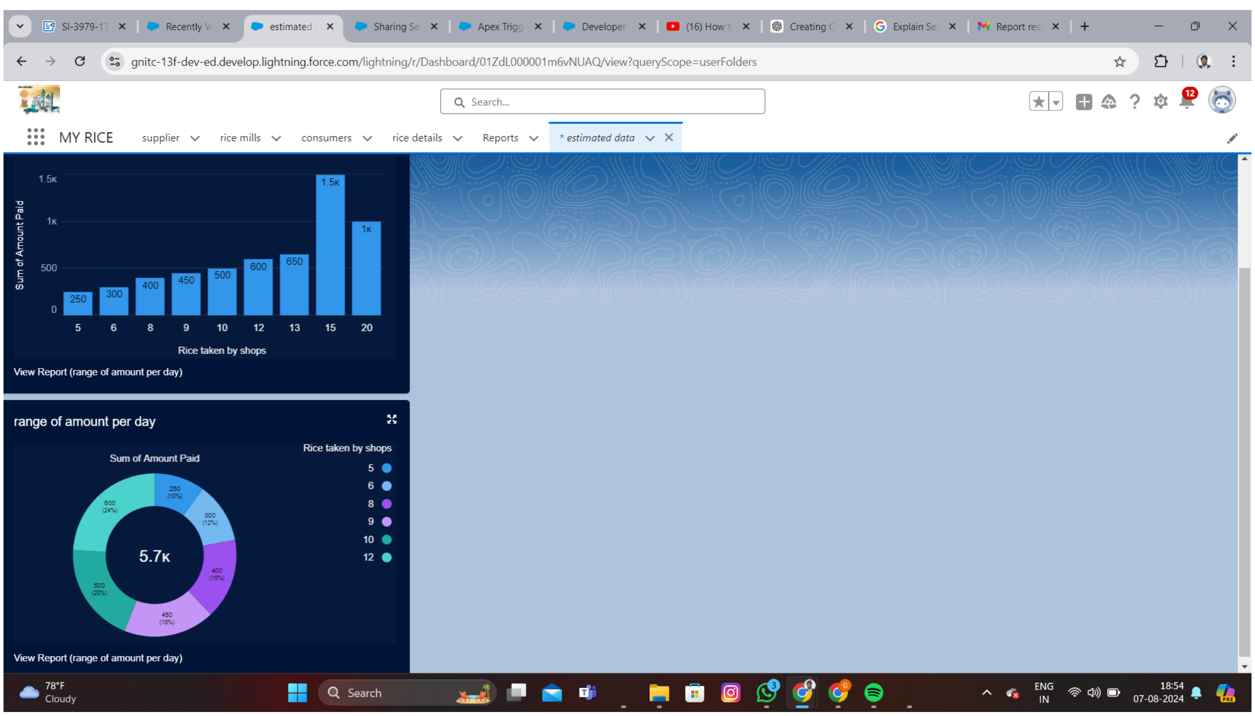
Add the component

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



Click add.
Click save and done.

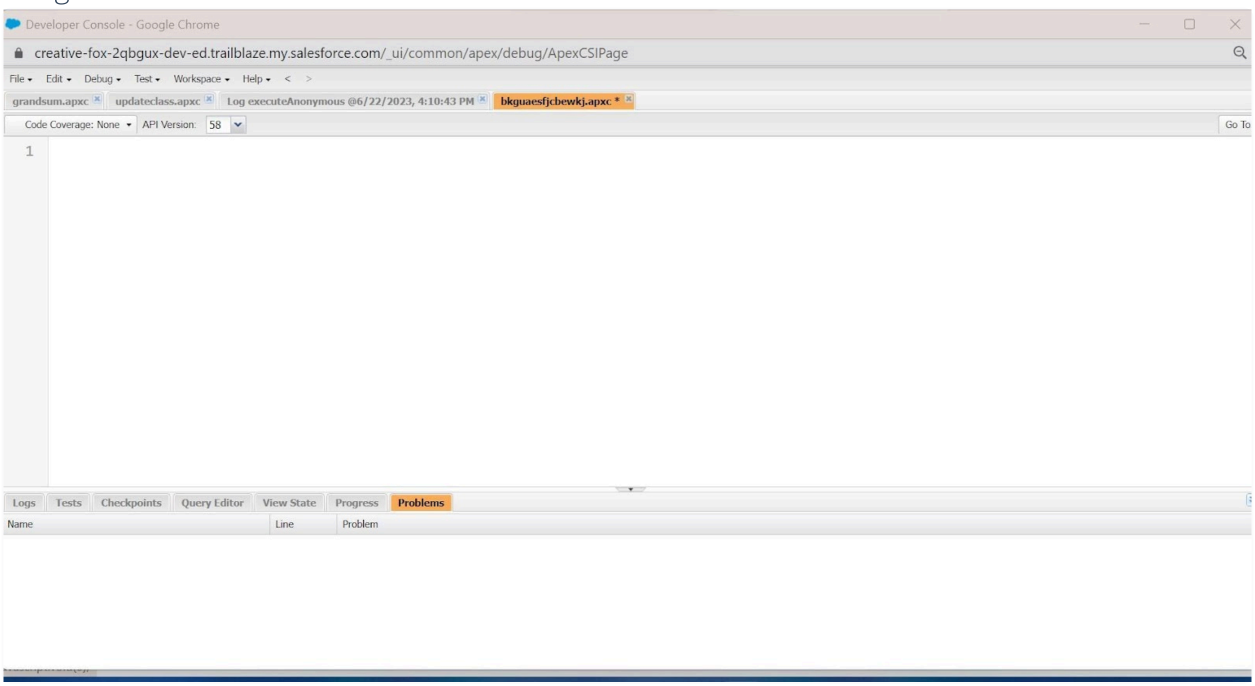

Component
Add Component
Report
range of amount per day
Use chart settings from report
Display As
123
Value
Sum of amount paid
Sliced By
Preview
range of amount per day
Sum of amount paid
rice taken by shops
8
5
10
6
12
15
400 (11.94%)
500 (14.93%)
500 (14.93%)
600 (17.91%)
600 (17.91%)
750 (22.39%)
5.1K
View Report (range of amount per day)
Cancel
Add


gnitc-13f-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01ZdL000001m6vNUAQ/view?queryScope=userFolders
Search...
MY RICE
supplier
rice mills
consumers
rice details
Reports
* estimated data
Sum of Amount Paid
Rice taken by shops
View Report (range of amount per day)
range of amount per day
Sum of Amount Paid
Rice taken by shops
5.7K
View Report (range of amount per day)
78°F
Cloudy
Search
ENG
IN
18:54
07-08-2024

Task 34:

Creating an Apex Class(ConsumerRecord)

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



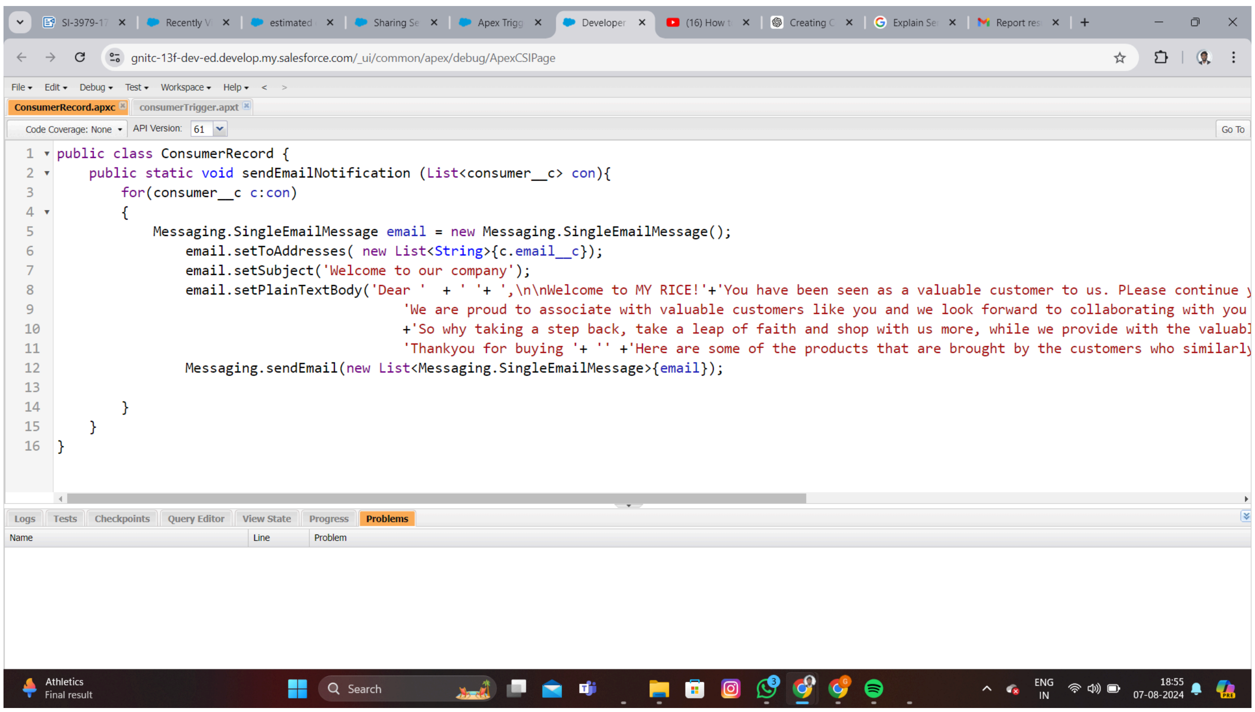
3. Then you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Class.
4. Enter the name of the class(ConsumerRecord) to create a new class file.

Code Snippet :

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

```
offers too.' + '\n'
                                        +'So why taking a step back, take a leap of faith and shop with us more,
while we provide with the valuable products and offers'+'\n'+'\n'+'\n'+
                                        'Thankyou for buying '+ " +'Here are some of the products that are
brought by the customers who similarly bought products like this'+'\n\n');
               Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});

        }
    }
}
```



Task 35:

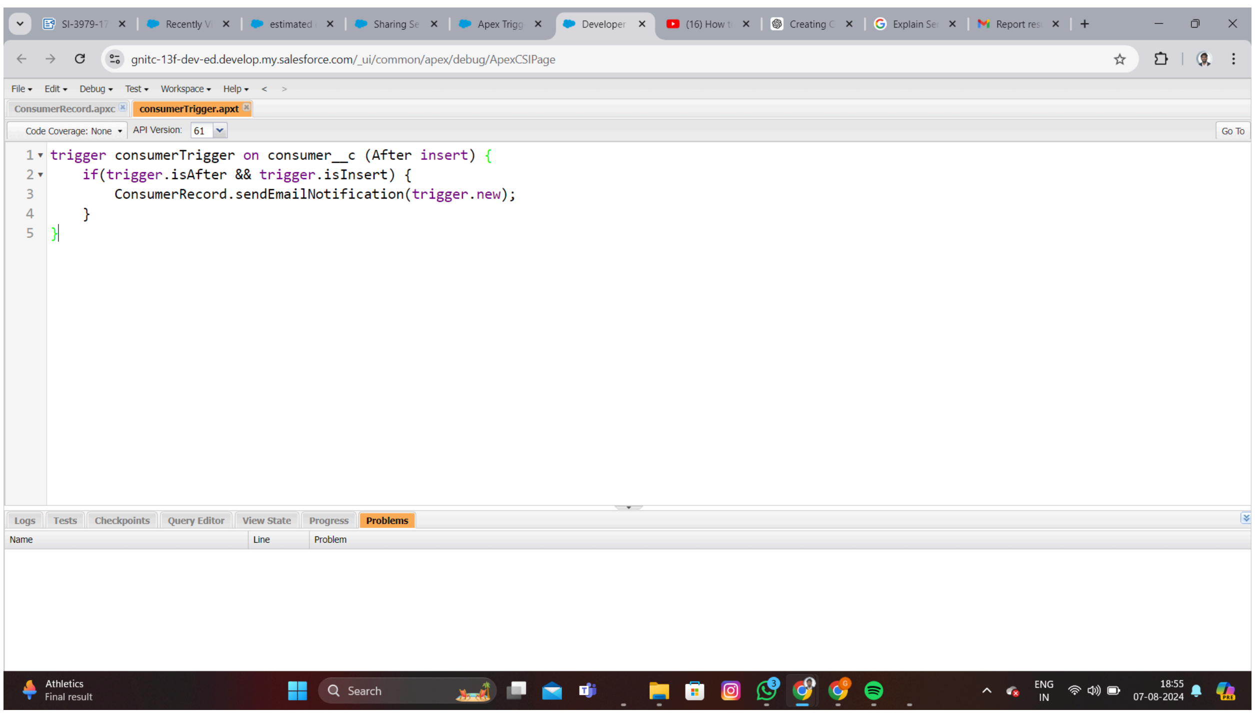
Creating an Apex Trigger

create a new trigger :

1. While still in the trailhead account, navigate to the gear icon in the top right corner.
2. Click on developer console and you will be navigated to a new console window.
3. Click on the File menu in the toolbar, and click on new >> Trigger.
4. Enter the trigger name as "consumerTrigger" and the object as "consumer__c" to be triggered.

Trigger code:

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



Thank You