

CRM APPLICATION FOR WHOLESALE RICE MILL

The Rice Mill CRM streamlines daily rice production and sales reporting, enhancing efficiency and customer experiences. The Rice Mill CRM Application is a comprehensive solution designed to streamline and simplify the daily operations of a rice mill factory. It tracks daily rice production, sales, and types of rice, and sends daily reports to the owners. Leveraging the power of customer relationship management (CRM), the application enhances customer experiences, optimizes store operations, and improves overall efficiency. This project aims to develop a user-friendly and feature-rich application that addresses the specific needs of a rice mill factory.

This project aimed to customize Salesforce to streamline operations for managing consumer, rice mill, and supplier data effectively. Starting from defining custom objects to configuring roles, profiles, and permissions, the project focused on ensuring tailored access and functionality based on user roles.

Milestones and Activities:

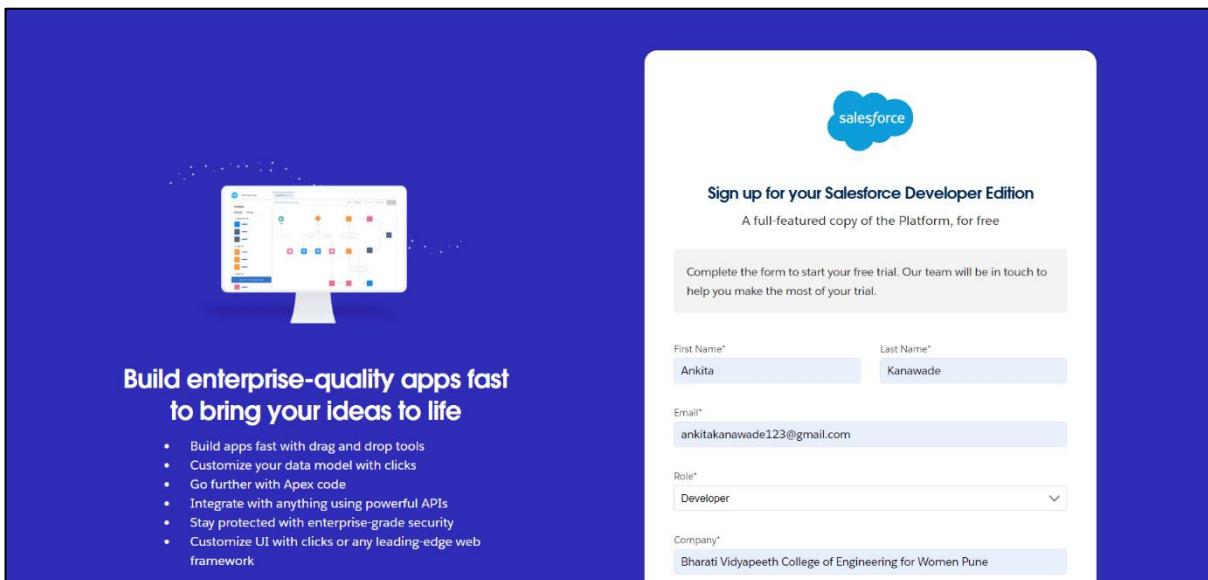
Milestone 1: Salesforce Introduction

What is Salesforce?

Salesforce is a customer success platform designed to help you sell, service, market, analyze, and connect with your customers. It has everything you need to run your business from anywhere, including managing relationships, collaborating with employees and partners, and securely storing data in the cloud.

Activity 1: Creating Developer Account

Sign up at [Salesforce Developer Signup](#).



Country/Region*
India

State/Province*
Maharashtra

Postal Code*
411043

Username*
ankitakanawade@crm.application

Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)

I agree to the [Main Services Agreement – Developer Services](#) and [Salesforce Program Agreement](#).

Yes, I would like to receive marketing communications regarding Salesforce products, services, and events. I can unsubscribe at any time.

By registering, you confirm that you agree to the processing of your personal data by Salesforce as described in the [Privacy Statement](#).

Sign me Up

Already have a Salesforce Developer Environment?
[Log in](#)

Activity 2: Account Activation

Verify email, set a password, and access the Salesforce setup page.

salesforce

Thanks for signing up with Salesforce!

Click below to verify your account.

Verify Account

To easily log in later, save this URL:
<https://bharatividyapeethcollege-2c-dev-ed.my.salesforce.com>

Username:
ankitakanawade@crm.application

Again, welcome to Salesforce!

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salesforce

Change Your Password

Enter a new password for ankitakanawade@crm.application
Make sure to include at least:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

* New Password
..... Good

* Confirm New Password
..... Match

⚠ Caps Lock is on.

Security Question
In what city were you born?

* Answer
Sangmner

Change Password

Password was last changed on 27/06/2024, 11:57 pm.

Milestone 2: Object Creation

- **What is an Object?** : Database tables that store data specific to an organization.
 - **Standard Objects:** Provided by Salesforce.
 - **Custom Objects:** Created by users.

Activities:

1. **Create Supplier Object:** Label Name: Supplier; Plural: Suppliers; Record Name: Supplier Name (Text); Allow Reports and Track Field History.

2. **Create Rice Mill Object:** Label Name: Rice Mill; Plural: Rice Mills; Record Name: Auto Number (rice-{000}, Starting Number: 1); Allow Reports and Track Field History.
3. **Create Consumer Object:** Label Name: Consumer; Plural: Consumers; Record Name: Auto Number (consumers-{000}, Starting Number: 1).
4. **Create Rice Details Object:** Label Name: Rice Details; Plural: Rice Details; Record Name: Auto Number (rice-{000}, Starting Number: 1).

The screenshot shows the Salesforce Setup Home interface. The left sidebar includes links for Setup Home, Service Setup Assistant, Commerce Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, Administration (Users, Data, Email), and Platform Tools (Subscription Management). The main content area features three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these is a section titled 'Most Recently Used' which lists 'rice details' as a Custom Tab Definition. A 'Create' button is visible in the top right corner of the main content area.

The screenshot shows the Salesforce Object Manager page. The left sidebar has 'Object Manager' selected. The main content area displays a table of standard objects, sorted by label. The columns are labeled: LABEL, API NAME, TYPE, DESCRIPTION, and LAST MODIFIED. The objects listed include Account, Activity, Address, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Asset, Asset Action, and Asset Action Source. The 'LAST MODIFIED' column shows the last update time for each object. A 'Create' button is visible in the top right corner of the main content area.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Account	Account	Standard Object		Custom Object
Activity	Activity	Standard Object		Custom Object from Splunk
Address	Address	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment Category	AppointmentCategory	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		
Appointment Invitee	AppointmentInvitee	Standard Object		
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object		
Asset	Asset	Standard Object		
Asset Action	AssetAction	Standard Object		
Asset Action Source	AssetActionSource	Standard Object		

New Custom Object

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label: Example: Account

Plural Label: Example: Accounts

Starts with vowel sound:

The Object Name is used when referencing the object via the API.

Object Name: Example: Account

Description:

Context Sensitive Help Setting: Open the standard Salesforce.com Help & Training window
 Open a window using a Visualforce page

Content Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Example: Account Name

Data Type: Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status

- In Development
- Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. Learn more.

Deployment Status

- In Development
- Deployed

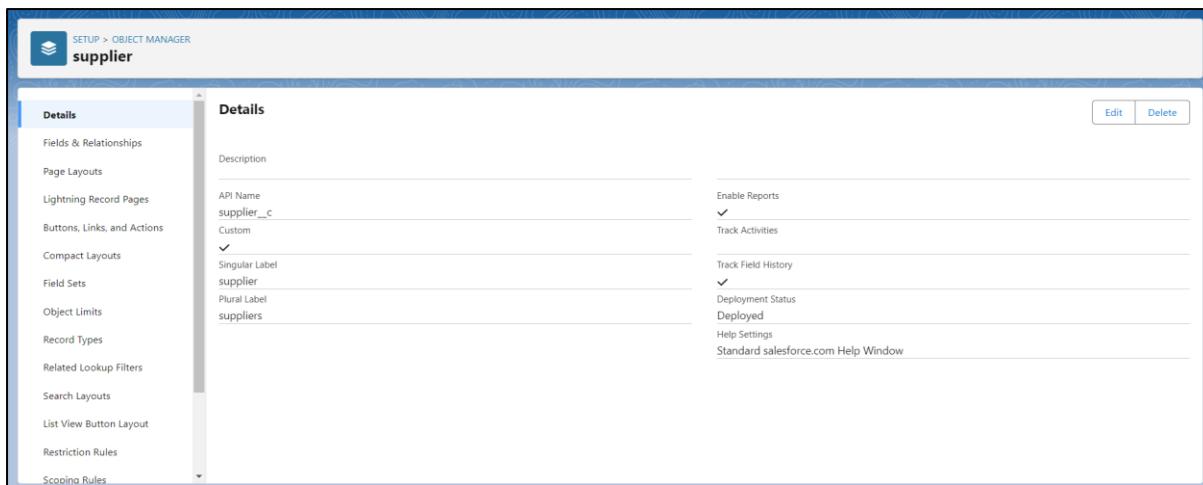
Search Status

When this setting is enabled, your users can find records of this object type when they search. Learn more.

Allow Search

Object Creation Options (Available only when custom object is first created)

- Add Notes and Attachments related list to default page layout
- Launch New Custom Tab Wizard after saving this custom object



Milestone 3: Tabs

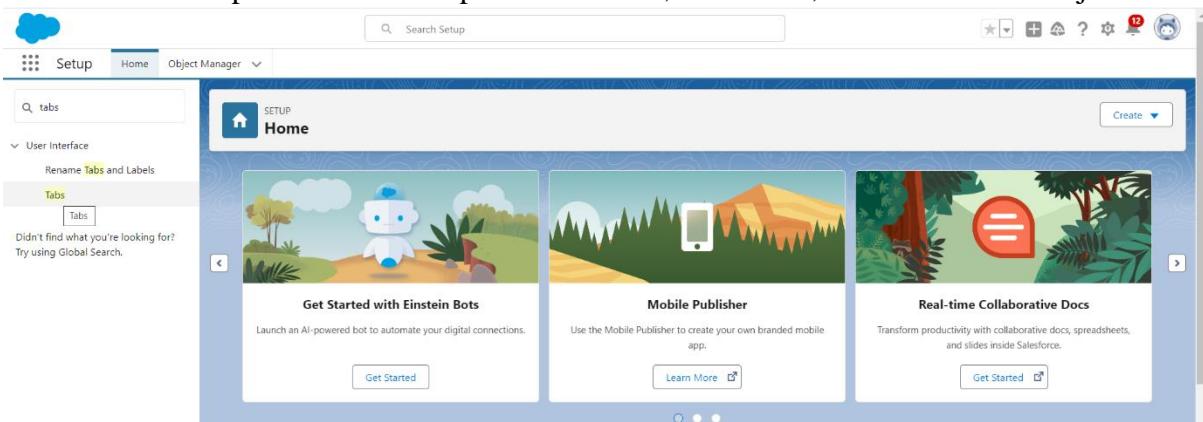
- **What is a Tab?**: A user interface used to build and view records for objects.

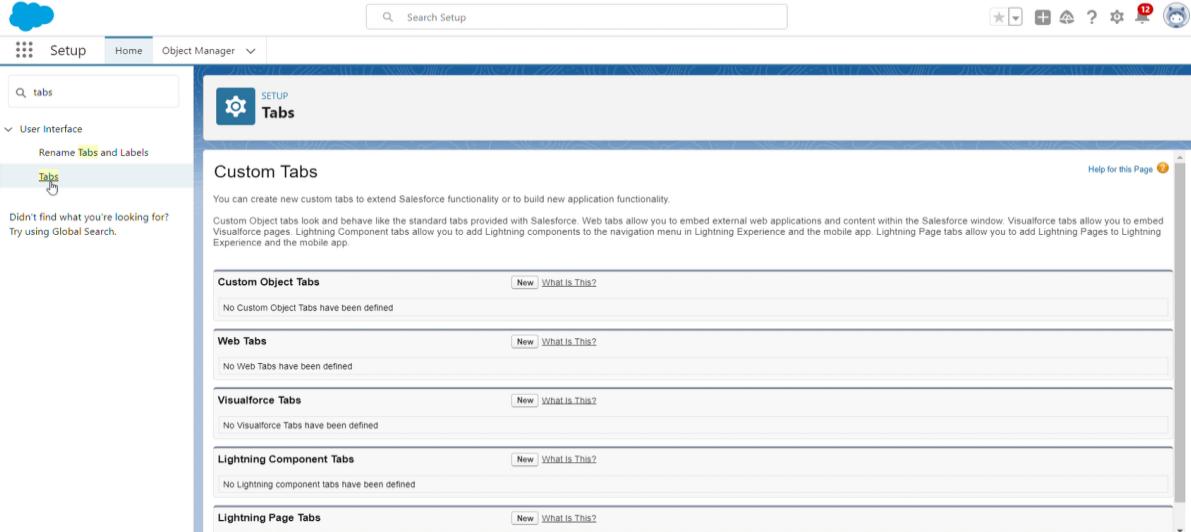
Types of Tabs:

1. **Custom Tabs**: Interface for custom applications, behaving like standard Salesforce tabs.
2. **Web Tabs**: Display web content or applications within Salesforce.
3. **Visualforce Tabs**: Display Visualforce pages.
4. **Lightning Component Tabs**: Add Lightning components to the navigation menu in Lightning Experience and the mobile app.
5. **Lightning Page Tabs**: Add Lightning Pages to the mobile app navigation menu (not shown on All Tabs page or Available Tabs list).

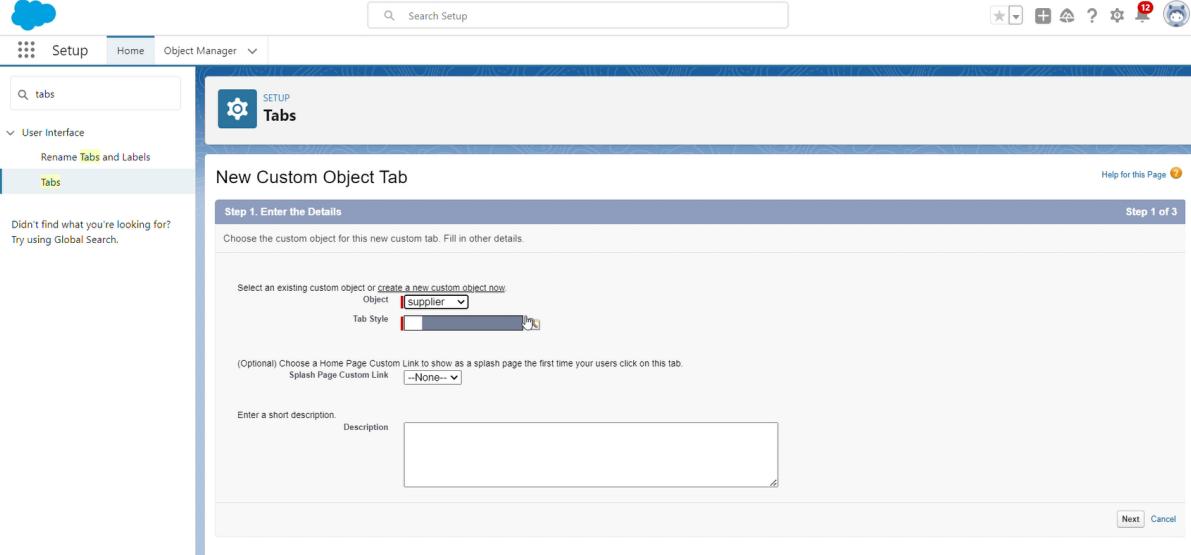
Activities:

1. **Creating a Custom Tab (Supplier)**:
 - o Setup → Tabs in Quick Find bar → Custom Object Tabs → New
 - o Select Object (Supplier) → Select tab style → Next (default profiles) → Next (uncheck include tab) → Ensure "Append tab to users' existing personal customizations" is checked → Save.
2. **Creating Remaining Tabs**:
 - o Repeat the above steps for Rice Mill, Consumer, and Rice Details objects.





The screenshot shows the Salesforce Setup interface under the 'User Interface' section, specifically the 'Tabs' page. The main content area is titled 'Custom Tabs' and contains sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Each section includes a 'New' button and a 'What Is This?' link. A sidebar on the left lists 'User Interface' options like 'Rename Tabs and Labels' and 'Tabs', with 'Tabs' being the active tab.



This screenshot shows the 'New Custom Object Tab' wizard. Step 1, 'Enter the Details', is displayed. It asks to choose a custom object ('Object' dropdown set to 'Supplier') and a tab style ('Tab Style' dropdown showing 'Box[1]'). An optional 'Splash Page Custom Link' is set to 'None'. A description field is present, and the bottom right has 'Next' and 'Cancel' buttons.



New Custom Object Tab

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).
Object

Tab Style

(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

Enter a short description.
Description

Next **Cancel**

New Custom Object Tab

Step 2. Add to Profiles

Choose the user profiles 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 profile.

Apply one tab visibility to all profiles
 Apply a different tab visibility for each profile

Profile	Tab Visibility
Analytics Cloud Integration User	<input type="button" value="Default On"/> <input type="button" value="▼"/>
Analytics Cloud Security User	<input type="button" value="Default On"/> <input type="button" value="▼"/>
Authenticated Website	<input type="button" value="Default On"/> <input type="button" value="▼"/>
Authenticated Website	<input type="button" value="Default On"/> <input type="button" value="▼"/>
B2B Reordering Portal Buyer Profile	<input type="button" value="Default On"/> <input type="button" value="▼"/>
Contract Manager	<input type="button" value="Default On"/> <input type="button" value="▼"/>
Cross Org Data Proxy User	<input type="button" value="Default On"/> <input type="button" value="▼"/>
Custom: Marketing Profile	<input type="button" value="Default On"/> <input type="button" value="▼"/>
Custom: Sales Profile	<input type="button" value="Default On"/> <input type="button" value="▼"/>
Custom: Support Profile	<input type="button" value="Default On"/> <input type="button" value="▼"/>

Step 3. Add to Custom Apps

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	<input type="checkbox"/> Include Tab
Platform (standard__Platform)	<input type="checkbox"/>
Sales (standard__Sales)	<input type="checkbox"/>
Service (standard__Service)	<input type="checkbox"/>
Marketing CRM Classic (standard__Marketing)	<input type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>
Community (standard__Community)	<input type="checkbox"/>
Site.com (standard__Sites)	<input type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input type="checkbox"/>
Content (standard__Content)	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>

Site.com (standard__Sites)	<input type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input type="checkbox"/>
Content (standard__Content)	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard__LightningService)	<input type="checkbox"/>
Sales (standard__LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>
Subscription Management (standard__RevenueCloudConsole)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input type="checkbox"/>
Automation (standard__FlowsApp)	<input type="checkbox"/>
<input checked="" type="checkbox"/> Append tab to users' existing personal customizations	
Previous Save Cancel	
Save	

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Action	Label	Tab Style	Description
Edit Del	consumers	 Bank	
Edit Del	rice_details	 Apple	
Edit Del	rice_mills	 Bell	
Edit Del	suppliers	 Box	

Milestone 4: The Lightning App

- **What is a Lightning App?:** A collection of items serving a specific function, accessible via a navigation bar in Lightning Experience.

Activities:

1. Create a Lightning App:

- Setup → App Manager → New Lightning App
- App Name: MY RICE → Next (default app options) → Next (default utility items) → Next.
- Upload a related photo.
- Add Navigation Items: Select Supplier, Rice Mill, Consumer, and Rice Details → Next.
- Add User Profiles: Search System Administrator → Add → Save & Finish.

Lightning Experience App Manager

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name	Developer Name	Description	Last Modified Date	App Type	Visibility
All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	26/06/2024, 10:31 pm	Classic	✓
Analytics Studio	Insights	App Launcher tabs	26/06/2024, 10:31 pm	Classic	✓
App Launcher	AppLauncher	Automate business processes and repetitive tasks.	26/06/2024, 10:35 pm	Lightning	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	26/06/2024, 10:34 pm	Lightning	✓
Community	Community	Salesforce CRM Communities	26/06/2024, 10:31 pm	Classic	✓
Content	Content	Salesforce CRM Content	26/06/2024, 10:31 pm	Classic	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	26/06/2024, 10:31 pm	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	26/06/2024, 10:31 pm	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	26/06/2024, 10:31 pm	Lightning	✓
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	26/06/2024, 10:31 pm	Classic	✓
Platform	Platform	The fundamental Lightning Platform	26/06/2024, 10:31 pm	Classic	✓
Queue Management	QueueManagement	Create and manage queues for your business.	26/06/2024, 10:31 pm	Lightning	✓
Sales	Sales	The world's most popular sales force automation (SFA) solution	26/06/2024, 10:31 pm	Classic	✓

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name

*Developer Name

Description

App Branding

Image

Primary Color Hex
Value

Org Theme Options
 Use the app's image and color instead of the org's

Next

New Lightning App

App Options

Navigation and Form Factor

*Navigation Style
 Standard navigation
 Console navigation

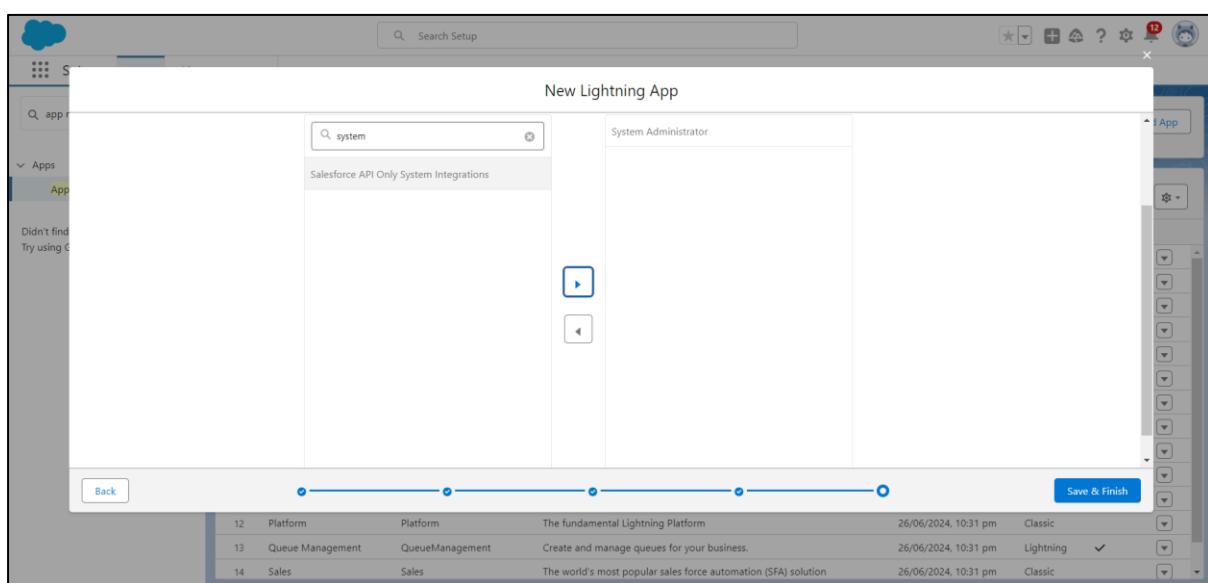
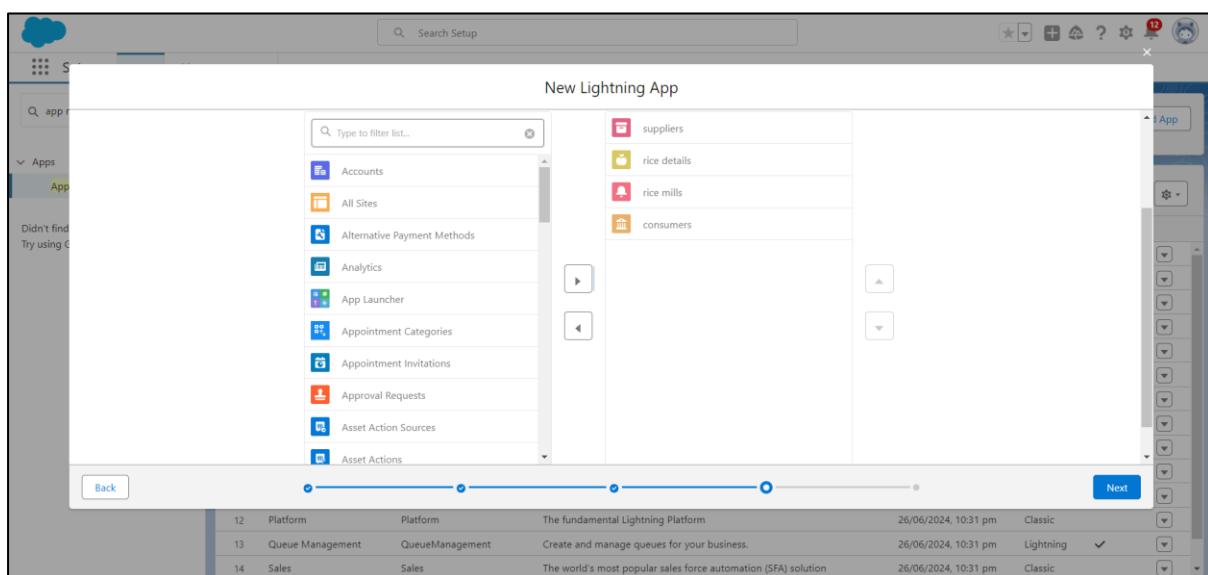
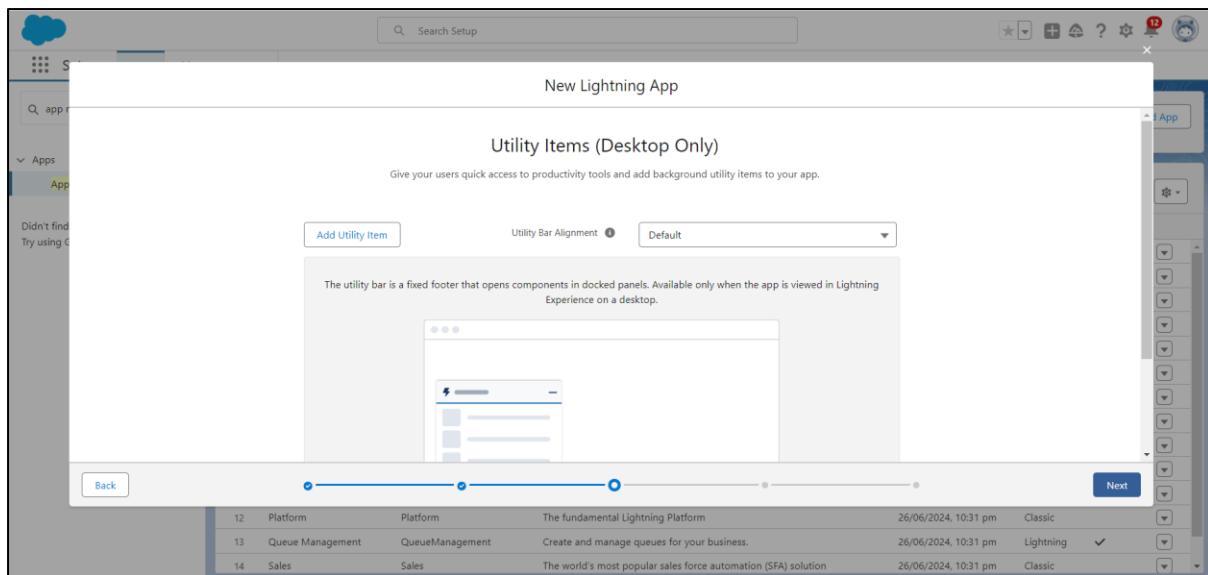
*Supported Form Factors
 Desktop and phone
 Desktop
 Phone

Setup and Personalization

Setup Experience
 Setup (full set of Setup options)
 Service Setup

App Personalization Settings
 Disable end user personalization of nav items in this app
 Disable temporary tabs for items outside of this app
 Use Omni-Channel sidebar

Back **Next**



Milestone 5: Fields

- **What are Fields?**: Data stored in the columns of a relational database.

Types of Fields:

1. **Standard Fields**: Predefined fields performing standard tasks (e.g., Created By, Owner, Last Modified).
2. **Custom Fields**: Flexible fields that users can change as needed.

Activity 1: Creating Number Field in Rice Details Object:

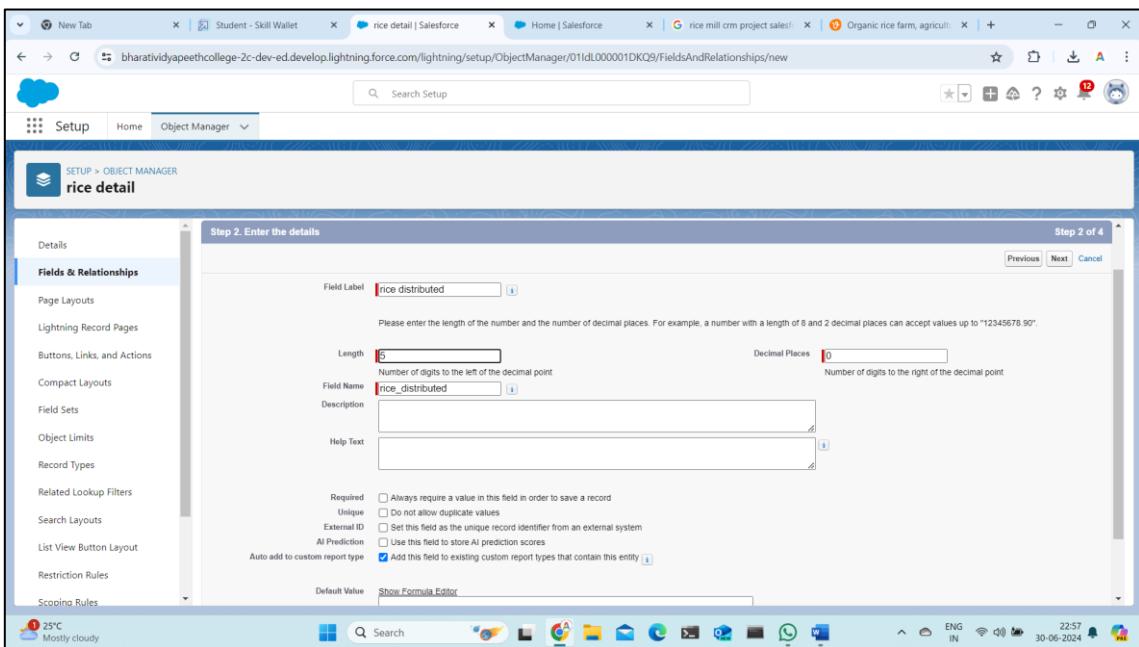
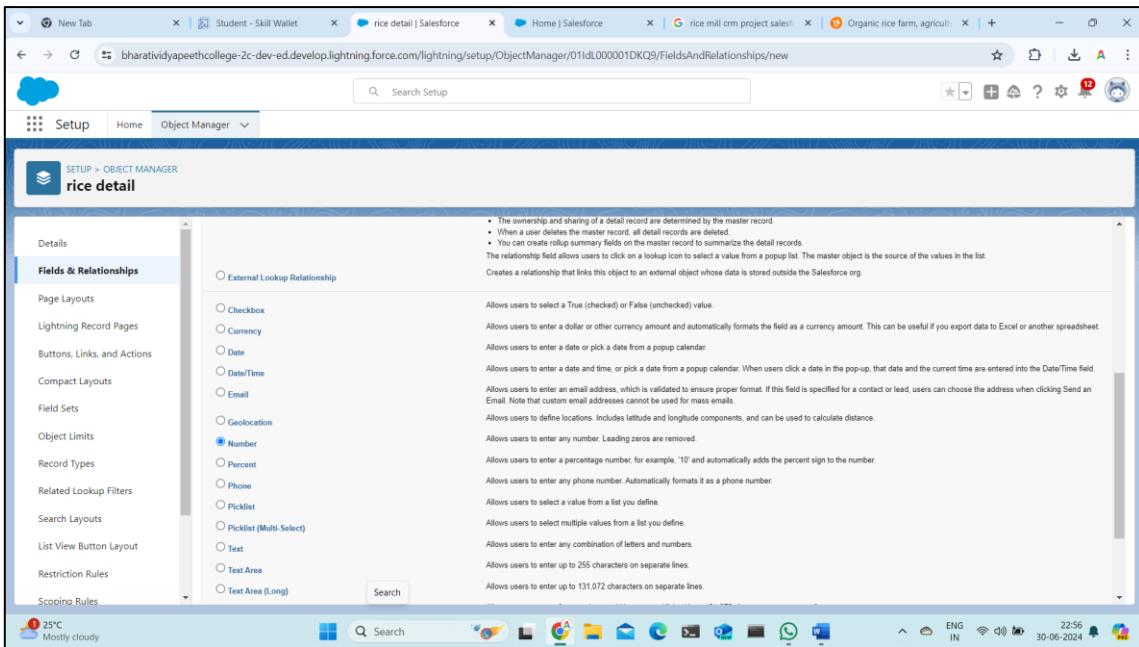
- Setup → Object Manager → Rice Details Object → Fields & Relationships → New
- Data Type: Number → Next
- Field Label: Rice Distributed; Length: 5 → Next → Next → Save.

The screenshot shows the Salesforce Object Manager interface. The search bar at the top contains 'rice'. The table lists the following objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Cart Item Price Adjustment	CartItemPriceAdjustment	Standard Object			
Price Book	Pricebook2	Standard Object			
Price Book Entry	PricebookEntry	Standard Object			
rice detail	rice_detail_c	Custom Object		27/06/2024	✓
rice mill	rice_mill_c	Custom Object		27/06/2024	✓

The screenshot shows the 'Fields & Relationships' section for the 'rice detail' object. The sidebar on the left lists various setup options. The main table displays the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
rice details Name	Name	Auto Number	✓	



Activity 2: Creating Junction Object:

- Setup → Object Manager → Rice Details Object → Fields & Relationships → New
- Data Type: Master-Detail Relationship → Next
- Related Object: Supplier → Next
- Field Label: Supplier Name → Next → Next → Save & New.
- Repeat for Rice Mill (Field Label: Rice Mill 1).

Screenshot of the Salesforce Object Manager Fields & Relationships page for the 'rice detail' object.

The page shows the following details:

- Fields & Relationships**: 5 items, Sorted by Field Label
- FIELD LABEL**, **FIELD NAME**, **DATA TYPE**, **CONTROLLING FIELD**, **INDEXED**
- Items listed:
 - Created By (CreatedBy)
 - Last Modified By (LastModifiedBy)
 - Owner (OwnerId)
 - rice details Name (Name)
 - rice distributed (rice_distributed_c)

On the left sidebar, under **Fields & Relationships**, the following options are visible:
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.

Screenshot of the 'New Custom Field' setup page for the 'rice detail' object.

The page shows the following steps:

- Step 1. Choose the field type**

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

Data Type (radio buttons):

- None Selected
- Auto Number
- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship

Help text for Master-Detail 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.
• 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.

On the left sidebar, under **Fields & Relationships**, the following options are visible:
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.

Screenshot of the 'New Relationship' setup page for the 'rice detail' object.

The page shows the following steps:

- Step 2. Choose the related object**

Select the other object to which this object is related.

Related To:

On the right, it says "Step 2 of 6".

rice detail
New Relationship

Step 3. Enter the label and name for the lookup field

Step 3 of 6

Field Label: Supplier Name

Field Name: Supplier

Description:

Help Text:

Child Relationship Name: rice_details

Sharing Setting: Select the minimum access level required on the Master record to create, edit, or delete related Detail records:
 Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
 Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting: Child records can be reparented to other parent records after they are created

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

Activity 3: Creating Master-Detail Relationship:

- Setup → Object Manager → Consumer Object → Fields & Relationships → New
- Data Type: Master-Detail Relationship → Next
- Related Object: Rice Mill → Next
- Field Label: Rice Mill Name → Next → Next → Save.

SETUP Home Object Manager

Object Manager

consumer

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
consumer	consumer__c	Custom Object		27/06/2024	✓

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
consumer Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Roll-Up Summary

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.

External Lookup Relationship

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

consumer
New Relationship

Step 2. Choose the related object Step 2 of 6

Select the other object to which this object is related.

Related To: Rice mill

Previous Next Cancel

consumer
New Relationship

Step 3. Enter the label and name for the lookup field Step 3 of 6

Field Label: rice mill name

Field Name: rice_mill_name

Description:

Help Text:

Child Relationship Name: consumers

Sharing Setting: Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
 Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
 Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting: Child records can be reparented to other parent records after they are created

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

Previous Next Cancel

Activity 4: Creating Roll-up Summary Field:

- Setup → Object Manager → Supplier Object → Fields & Relationships → New
- Data Type: Roll-up Summary → Next
- Field Label: Sum of Rice Distributed → Next
- Summarized Object: Rice Details → Roll-up Type: Sum → Field to Aggregate: Rice Distributed → Next → Next → Save.
- Repeat for Rice Mill Object (Field Label: Rice Distributed to Shops).

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)		✓
supplier Name	Name	Text(80)		✓

<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> 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.
<input checked="" type="radio"/> 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.
<input type="radio"/> 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.

supplier
New Custom Field Help for this Page 

Step 2. Enter the details Step 2 of 5

Field Label: i

Field Name: i

Description:

Help Text:

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

Previous Next Cancel

supplier
New Custom Field Help for this Page 

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize ! Required Information

Master Object: Summarized Object: i

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate: i

Filter Criteria

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

Previous Next Cancel

SETUP **Object Manager** 4 Items. Sorted by Label

Search: consum Schema Builder Create ▾

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
consumer	consumer__c	Custom Object		27/06/2024	✓
Consumption Rate	ConsumptionRate	Standard Object			
Consumption Schedule	ConsumptionSchedule	Standard Object			
Product Consumption Schedule	ProductConsumptionSchedule	Standard Object			

Step 2. Enter the details

Field Label: rice taken by shops in kgs

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length:	<input type="text" value="5"/>	Decimal Places:	<input type="text" value="0"/>
Number of digits to the left of the decimal point		Number of digits to the right of the decimal point	

Field Name: rice_taken_by_shops_in_Kg

Description:

Help Text:

Required A value is required in this field in order to save a record.

Activity 5: Creating Fields in Objects:

- Rice Details: Number Field → Field Label: Supplier Name; Length: 5 → Next → Next → Save.
- Rice Mill: Number Field → Field Label: Rice Price/Kg; Length: 5 → Next → Next → Save.
- Consumer: Create fields (First Name, Last Name, Phone Number, Email, Rice Taken by Shops, Rice Type, Mode of Payment) as specified.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
rice detail	rice_detail_c	Custom Object		27/06/2024	✓

Fields & Relationships					
FIELD LABEL FIELD NAME DATA TYPE CONTROLLING FIELD INDEXED					
Created By	CreatedById	Lookup(User)			
Last Modified By	LastModifiedById	Lookup(User)			
rice details Name	Name	Auto Number		✓	
rice distributed	rice_distributed__c	Number(5, 0)			
rice mill one	rice_mill_one__c	Master-Detail(rice mill)		✓	
supplier Name	supplier_Name__c	Master-Detail(supplier)		✓	

rice detail
New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label supplier_name

Length 50 Number of digits to the left of the decimal point

Decimal Places 0 Number of digits to the right of the decimal point

Field Name supplier_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

Activity 6: Creating Cross-Object Formula Field in Consumer Object:

- Setup → Object Manager → Consumer Object → Fields & Relationships → New
- Data Type: Formula → Next
- Field Label and Name: Amount Paid → Formula Return Type: Number → Next
- Formula: rice_taken_by_shops_c * rice_mill_name_r.rice_price_kg_c → Check Syntax → Save.

SETUP Object Manager

1 Items. Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
rice mill	rice_mill_c	Custom Object		27/06/2024	✓

Details Fields & Relationships 5 Items. Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
rice mill Name	Name	Auto Number	✓	
rice taken	rice_taken_c	Roll-Up Summary (SUM consumer)		

rice mill
New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label rice price/kg

Length 5 Number of digits to the left of the decimal point

Decimal Places 0 Number of digits to the right of the decimal point

Field Name rice_price_kg

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

Activity 7: Creating Formula Field in Consumer Object:

- Setup → Object Manager → Consumer Object → Fields & Relationships → New
- Data Type: Formula → Next
- Field Label and Name: Consumer Name → Formula Return Type: Text → Next
- Formula: First_Name__c + '' + Last_Name__c → Check Syntax → Save.

The screenshot shows the 'New Custom Field' wizard in Step 2 of 5. The 'Fields & Relationships' tab is selected in the sidebar. The 'Field Label' is set to 'Amount Paid' and the 'Field Name' is 'Amount_Paid'. The 'Formula Return Type' section is expanded, showing the 'Number' option selected. A detailed description of the Number type is provided, mentioning it calculates a numeric value like Fahrenheit = 1.8 * Celsius__c + 32. Other options like Boolean, Currency, Date, and Datetime are also listed with their descriptions.

The screenshot shows the 'New Custom Field' wizard in Step 3 of 5. The 'Fields & Relationships' tab is selected in the sidebar. The 'Enter formula' step is shown with the formula 'Amount Paid (Number) = ~~Customer__c~~ + 32'. The 'Simple Formula' tab is selected. A 'Quick Tips' box contains links to 'Getting Started' and 'Operators & Functions'. A 'Functions' dropdown menu lists various mathematical and string functions like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. An 'Insert Selected Function' button is also present.

The screenshot shows the 'New Custom Field' wizard in Step 2 of 5. The 'Fields & Relationships' tab is selected in the sidebar. The 'Field Label' is 'Consumer Name' and the 'Field Name' is 'Consumer_Name'. The 'Formula Return Type' section is expanded, showing the 'Text' option selected. A detailed description of the Text type is provided, mentioning it creates a text string like Full Name = LastName__c + ', ' + FirstName. Other options like Boolean, Currency, Date, and Datetime are also listed with their descriptions.

Step 3. Enter formula

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Full Name = LastName & ", " & FirstName | [More Examples...](#)

[Simple Formula](#) [Advanced Formula](#)

[Insert Field](#) [Insert Operator](#)

Consumer Name (Text) =

```
First_Name_c + ' ' + Last_Name_c
```

Functions

-- All Function Categories --

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

[Insert Selected Function](#)

Activity 8: Creating Validation Rule:

- Setup → Object Manager → Consumer Object → Validation Rules → New
- Rule Name: Phonenumbereoremailblankrule
- Description: Phone number and email number should not be blank
- Formula: OR(ISBLANK(phone_number_c), ISBLANK(email_c)) → Check Syntax
- Error Message: "Please fill in your phone number." → Error Location: Top of Page → Save.

SETUP > OBJECT MANAGER consumer

Validation Rules

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
		No items to display.		

consumer Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, 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: Phonenumbereoremailblankrule

Active:

Description: phone number and email number should not be blank

Error Condition Formula

Example: Discount_Percent_c>0.30 | [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](#)

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is **true**

Error Message: Please fill in your 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](#)

Validation Rule Detail

Rule Name	Phonenumberoremailblankrule	Active
Error Condition Formula	OR(ISBLANK(Phone_number__c) , ISBLANK(email__c))	✓
Error Message	please fill in your phone number.	Error Location Top of Page
Description	phone number and email number should not be blank	
Created By	Ankita Kanawade, 01/07/2024, 10:02 pm	Modified By Ankita Kanawade, 01/07/2024, 10:02 pm

Milestone 6: Page Layouts

Page Layouts in Salesforce allow customization of detail and edit pages for records. They control the appearance of fields, related lists, and custom links.

Activity 1: Creating a Page Layout

- Navigate to Setup > Object Manager > Select Object (e.g., Consumer) > Page Layouts > New.
- Create sections like "Personal Details", "Rice Details", and "Receipt Details".
- Drag fields (e.g., First name, Last name) into appropriate sections.
- Save the layout.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
consumer Layout	Ankita Kanawade, 27/06/2024, 3:45 pm	Ankita Kanawade, 01/07/2024, 9:57 pm

Create New Page Layout Help for this Page

As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names are translated for your international users.

Existing Page Layout: consumer Layout ▾
Page Layout Name: consumer layout

Milestone 7: Profiles

Profiles in Salesforce define user permissions and access settings.

Activity 1: Owner Profile

- Clone "Standard User" profile.
- Name it "Owner".
- Set permissions for objects like Consumers, Rice Details, Rice Mill, and Suppliers.

The screenshot shows the Salesforce 'Profiles' page under the 'SETUP' tab. The 'Owner' profile is selected. The 'Profile Detail' section shows the name 'owner', user license 'Salesforce', and creation details. The 'Page Layouts' section lists various standard object layouts and their assignments across different categories like Global, Email Application, Home Page Layout, Account, and Alternative Payment Method.

The screenshot shows the 'Custom Object Permissions' page. It displays permission matrices for four objects: 'consumers', 'rice details', 'rice mills', and 'suppliers'. The columns represent basic access (Read, Create, Edit, Delete) and data administration (View All, Modify All). Checkmarks indicate the specific permissions granted to each user type.

Activity 2: Employer Profile

- Clone "Standard Platform User" profile.
- Name it "Employer".
- Set default app to Rice Mill.
- Set permissions for objects like Consumers, Rice Details, Rice Mill, and Suppliers.

The screenshot shows the 'New Profile' page. It lists several existing profiles: 'Salesforce API Only System Integrations', 'Silver Partner User', 'Solution Manager', 'Standard Platform User' (which is currently selected), 'Standard User', and 'System Administrator'. The 'User License' column indicates the license for each profile.

The screenshot shows the 'Clone Profile' page. It prompts the user to enter the name of the new profile. A message states 'You must select an existing profile to clone from.' Below this, it shows the 'Existing Profile' as 'Standard Platform User', 'User License' as 'Salesforce Platform', and the 'Profile Name' field containing 'employer'. At the bottom are 'Save' and 'Cancel' buttons.

Custom Object Permissions												
	Basic Access					Data Administration						
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
consumers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
rice details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						

Session Settings

Activity 3: Worker Profile

- Clone "Standard Platform User" profile.
- Name it "Worker".
- Set default app to Rice Mill.
- Set permissions for objects like Consumers, Rice Details, Rice Mill, and Suppliers.

New Profile		A B C D E F G H I J K L M N	
<input type="checkbox"/>	Action	Profile Name	User License
<input type="checkbox"/>	Edit Del ...	Salesforce API Only System Integrations	Salesforce Integration
<input type="checkbox"/>	Edit Clone	Silver Partner User	Silver Partner
<input type="checkbox"/>	Edit Clone	Solution Manager	Salesforce
<input type="checkbox"/>	Edit Clone	Standard Platform User	Salesforce Platform
<input type="checkbox"/>	Edit Clone	Standard User	Salesforce
<input type="checkbox"/>	Edit Clone	System Administrator	Salesforce

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard Platform User
User License	Salesforce Platform
Profile Name	<input type="text" value="worker"/>

Save **Cancel**

Custom Object Permissions												
	Basic Access					Data Administration						
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
consumers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
rice details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					

Session Settings

Milestone 8: Role & Role Hierarchy

Roles in Salesforce define record-level visibility for users.

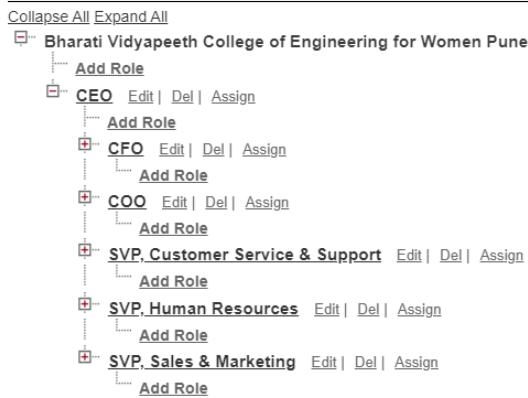
Activity 1: Creating Owner Role

- Navigate to Setup > Search for Roles > Set Up Roles.
- Expand All and add a role under which this role works.
- Label it "Owner" and save.

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



Role Edit
New Role

Role Edit

Label	<input type="text" value="owner"/>
Role Name	<input type="text" value="owner"/> i
This role reports to	<input type="text" value="CEO"/> 🔍
Role Name as displayed on reports	<input type="text"/>

[Save](#) [Save & New](#) [Cancel](#)

Activity 2: Creating Employer and Worker Roles

- Create roles under existing roles (e.g., under Owner).
- Label them "Employer" and "Worker" respectively.
- Save each role.

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](#) [Help for this Page](#)

Bharati Vidyapeeth College of Engineering for Women Pune	
Add Role	Edit Del Assign
CEO	Edit Del Assign
CFO	Edit Del Assign
COO	Edit Del Assign
owner	Edit Del Assign
SVP_Customer Service & Support	Edit Del Assign
SVP_Human Resources	Edit Del Assign
SVP_Sales & Marketing	Edit Del Assign
Add Role	Edit Del Assign

[Show in tree view](#)

Role Edit
New Role

Role Edit

Label	<input type="text" value="employer"/>
Role Name	<input type="text" value="employer"/> i
This role reports to	<input type="text" value="owner"/> 🔍
Role Name as displayed on reports	<input type="text"/>

[Save](#) [Save & New](#) [Cancel](#)

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](#) [Help for this Page](#)

Bharati Vidyapeeth College of Engineering for Women Pune	
Add Role	Edit Del Assign
CEO	Edit Del Assign
CFO	Edit Del Assign
COO	Edit Del Assign
owner	Edit Del Assign
employer	Edit Del Assign
SVP_Customer Service & Support	Edit Del Assign
SVP_Human Resources	Edit Del Assign
SVP_Sales & Marketing	Edit Del Assign
Add Role	Edit Del Assign

[Show in tree view](#)

Milestone 9: Users

Users in Salesforce are individuals who log in and access the system.

Activity 1: Create Users

- Go to Setup > Search for Users > New User.
- Fill in details like First Name, Last Name, Email, Username, Nickname.
- Assign roles (Owner, Employer, Worker) and profiles (Owner, Standard Platform User, etc.).
- Save each user.

Activity 2: Create Additional Users

1. Repeat the steps for creating more users:

- Go to Setup > Search for Users > New User.
- Fill in details like First Name, Last Name, Email, Username, Nickname.
- Assign roles (Owner, Employer, Worker) and profiles (Owner, Standard Platform User, etc.).
- Save each user.

New User

User Edit Save Save & New Cancel

General Information

First Name	ragu	Role	worker
Last Name	Raj	User License	Salesforce Platform
Alias	rraj	Profile	Standard Platform User
Email	rankitakanawade123@gmail.com	Active	<input checked="" type="checkbox"/>
Username	rankita123kanawade@123.c	Marketing User	<input type="checkbox"/>
Nickname	ragu	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		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	Default Limit (300)
		Accessibility Mode	Classic Only
		Hlink Contract Palatte on Charts	<input type="checkbox"/>

Milestone 10: Permission Sets

Permission sets in Salesforce extend user permissions without changing profiles.

Activity 1: Adjusting Organization-Wide Defaults (OWD)

- Navigate to Setup > Sharing Settings.
- Set "Public Read-Only" for Rice Mill and Supplier objects.
- Save to apply access rules based on profiles and roles.

Sharing

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 recalculations.

Manage sharing settings for: All Objects

Default Sharing Settings

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public ReadWrite/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public ReadWrite	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"/>
Opportunity	Public ReadWrite	Private	<input checked="" type="checkbox"/>
Case	Public ReadWrite/Transfer	Private	<input checked="" type="checkbox"/>
Campaign	Public Full Access	Private	<input checked="" type="checkbox"/>
Campaign Member	Controlled by Campaign	Controlled by Campaign	<input checked="" type="checkbox"/>
User	Public Read Only	Private	<input checked="" type="checkbox"/>

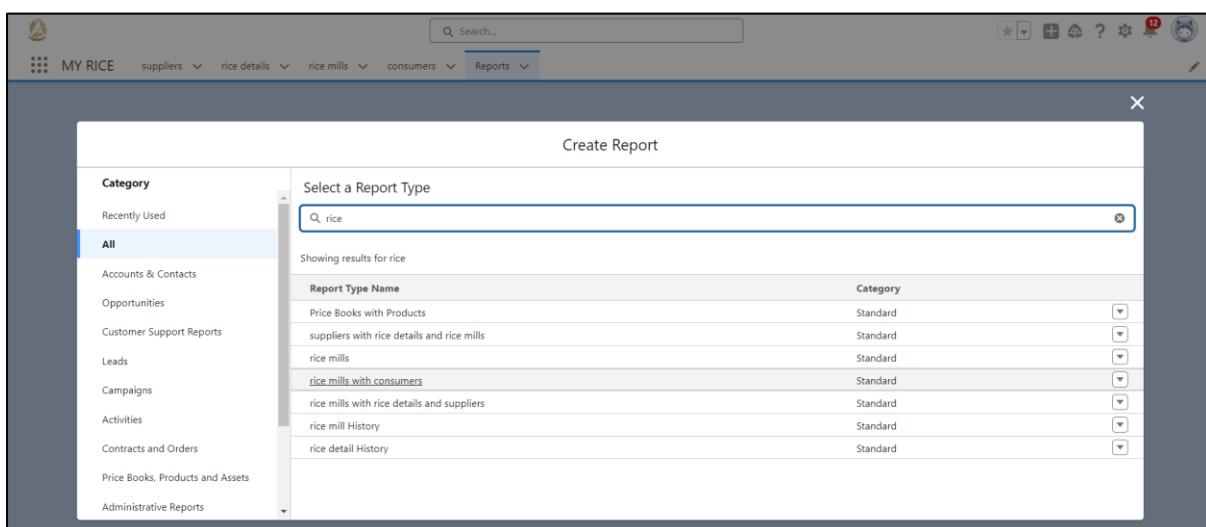
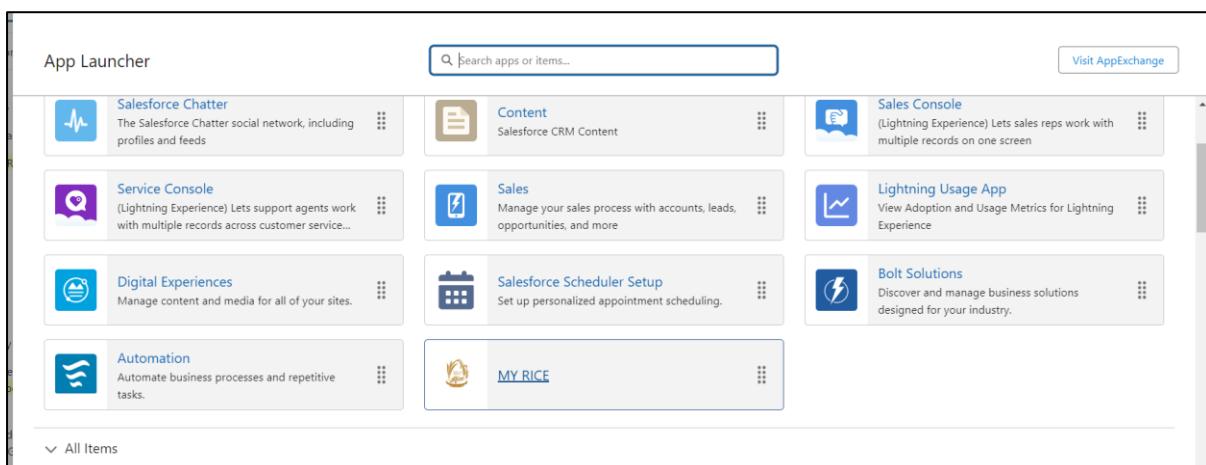
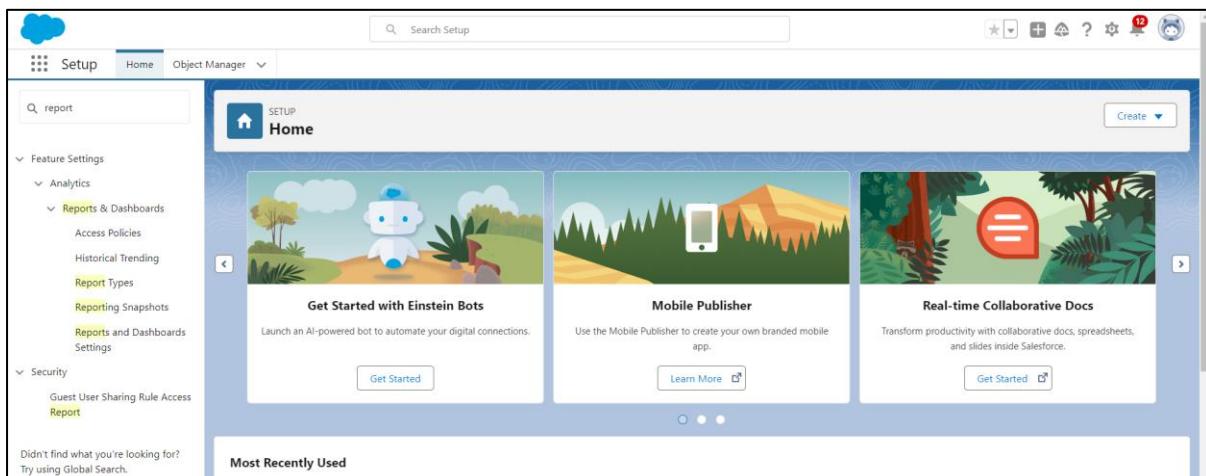
rice mill	Public Read Only	Private	<input checked="" type="checkbox"/>
supplier	Public Read Only	Private	<input checked="" type="checkbox"/>

Milestone 11: Reports

Reports in Salesforce provide insights into data with various types like Tabular, Summary, Matrix, and Joined.

Activity 1: Create Report

- Go to the Reports tab > New Report.
- Select "Rice Mill with Consumers" report type.
- Customize columns and group rows by relevant fields.
- Save and name the report "Range of Amount per Day".



REPORT range of amount per day rice mills with consumers

Rice taken by shops consumer: consumer Name Rice type rice price/kg Mode of payment Amount Paid

5 (1)	consumers-003	basmati	20	Cash	100.00
Subtotal			20		100.00
6 (2)	consumers-002	normal rice	25	Net banking	150.00
	consumers-005	normal rice	20	Debit card	120.00
Subtotal			45		270.00
8 (1)	consumers-001	basmati	20	Debit card	160.00
Subtotal			20		160.00
12 (1)	consumers-004	basmati	15	Debit card	180.00
Subtotal			15		180.00
20 (1)	consumers-006	basmati	30	UPI	600.00
Subtotal			30		600.00
Total (6)			90		1,310.00

Row Counts Detail Rows Subtotals Grand Total

Save Report

* Report Name
range of amount per day

Report Unique Name

Report Description

Folder
Private Reports

Report: rice mills with consumers
range of amount per day

Total Records Total rice price/kg Total Amount Paid
6 90 1,310.00

Rice taken by shops consumer: consumer Name Rice type rice price/kg Mode of payment Amount Paid

5 (1)	consumers-003	basmati	20	Cash	100.00
Subtotal			20		100.00
6 (2)	consumers-002	normal rice	25	Net banking	150.00
	consumers-005	normal rice	20	Debit card	120.00
Subtotal			45		270.00
8 (1)	consumers-001	basmati	20	Debit card	160.00
Subtotal			20		160.00
12 (1)	consumers-004	basmati	15	Debit card	180.00
Subtotal			15		180.00
20 (1)	consumers-006	basmati	30	UPI	600.00
Subtotal			30		600.00
Total (6)			90		1,310.00

Row Counts Detail Rows Subtotals Grand Total

Activity 2: Sharing Reports

- Edit the report > Subscribe.
- Configure email notifications to share the report with designated users.
- Save settings for automated sharing.

Report: rice mills with consumers
range of amount per day

Total Records	Total rice price/kg	Total Amount Paid		
6	90	1,310.00		
Rice taken by shops				
	consumer: consumer Name	Rice type	rice price/kg	Mode of payment
5 (1)	consumers-003	basmati	20	Cash
Subtotal			20	100.00
6 (2)	consumers-002	normal rice	25	Net banking
	consumers-005	normal rice	20	Debit card
Subtotal			45	270.00
8 (1)	consumers-001	basmati	20	Debit card
Subtotal			20	160.00
12 (1)	consumers-004	basmati	15	Debit card
Subtotal			15	180.00
20 (1)	consumers-006	basmati	30	UPI
Subtotal			30	600.00
Total (6)			90	1,310.00

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

Activity 3: Create Report Folder

- Go to Reports > New Folder.
- Name it "Estimated Rice per Day" for organizing reports.
- Save to categorize reports effectively.

Reports

Recent

1 item

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	range of amount per day		rice mill with consumers	Ankita Kanawade	1/7/2024, 11:57 pm	<input type="checkbox"/>

Create folder

* Folder Label
estimated rice per day

* Folder Unique Name
estimatedriceperday

[Cancel](#) [Save](#)

Reports							Search all reports...	New Report	New Folder	⋮
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed				
Recent	Program Overview by User	Analyze how different users are progressing towards a program and its outcome.	Enablement Dashboard Reports Summer '24	Automated Process	26/6/2024, 10:31 pm					
Created by Me	Program Overview by User	Analyze how different users are progressing towards a program and its outcome.	Enablement Dashboard Reports Spring '24	Automated Process	26/6/2024, 10:31 pm					
Private Reports	range of amount per day	rice mill with consumers	Ankita Kanawade	Automated Process	1/7/2024, 11:57 pm	✓				
Public Reports	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	26/6/2024, 10:31 pm					
All Reports	Sample Report: Orchestration Run Logs	What orchestration run logs were created and what happened in their associated orchestration runs?	Public Reports	Automated Process	26/6/2024, 10:31 pm					
FOLDERS	Sample Report: Orchestration Runs	What orchestration runs have been created and what's the current status of each run?	Public Reports	Automated Process	26/6/2024, 10:31 pm					
All Folders	Sample Report: Orchestration Stage Runs	What orchestration stage runs have been created and what's the current status of each run?	Public Reports	Automated Process	26/6/2024, 10:31 pm					
Created by Me	Sample Report: Orchestration Step	What orchestration step runs have been created and what's the current status of each run?	Public Reports	Automated Process	26/6/2024, 10:31 pm					
Shared with Me										
FAVORITES										
All Favorites										

Run
Edit
Subscribe
Export
Delete
Add to Dashboard
Favorite
[Move](#)

Move range of amount per day

All Folders > rice mill with consumers

Search folders...

- Einstein Bot Reports
- Einstein Bot Reports Spring '23
- Einstein Bot Reports Summer '23
- Einstein Bot Reports Summer '22
- Einstein Bot Reports Winter '23
- Enablement Dashboard Reports Spring '24
- Enablement Dashboard Reports Summer '24
- estimated rice per day
- rice mill with consumers

Nothing here yet
This folder has no subfolders.

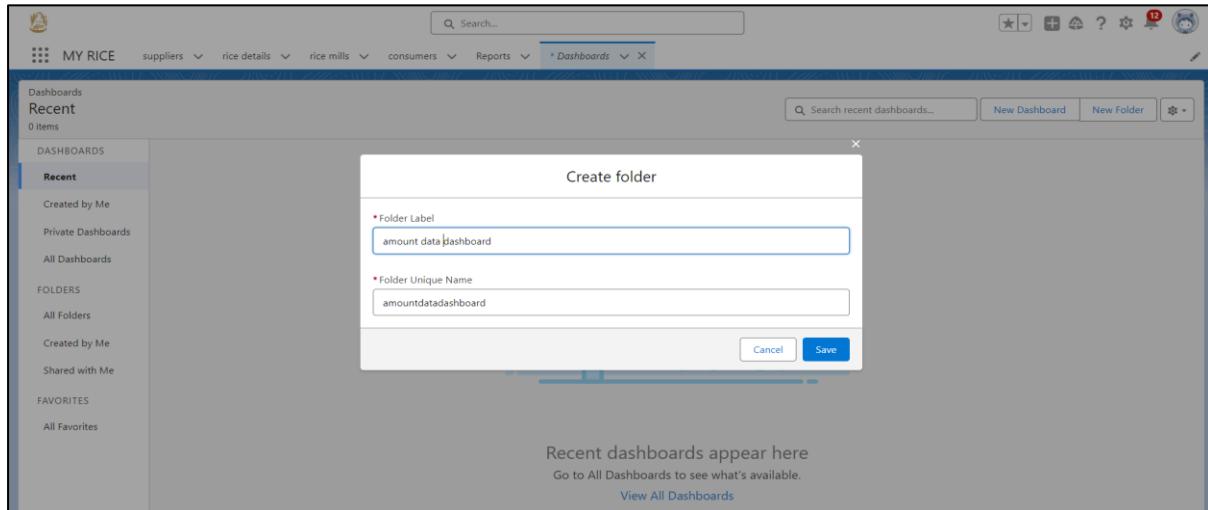
[New Folder](#) [Cancel](#) [Select Folder](#)

Milestone 12: Dashboards

Dashboards in Salesforce visualize data from reports for quick insights and decision-making.

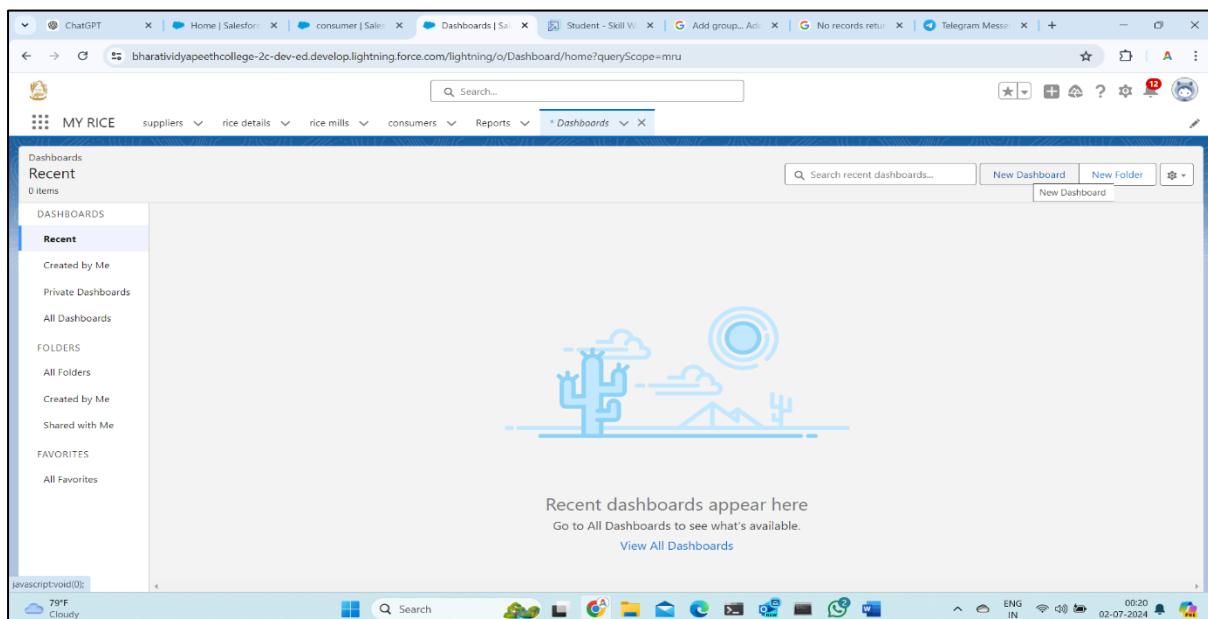
Activity 1: Create Dashboard Folder

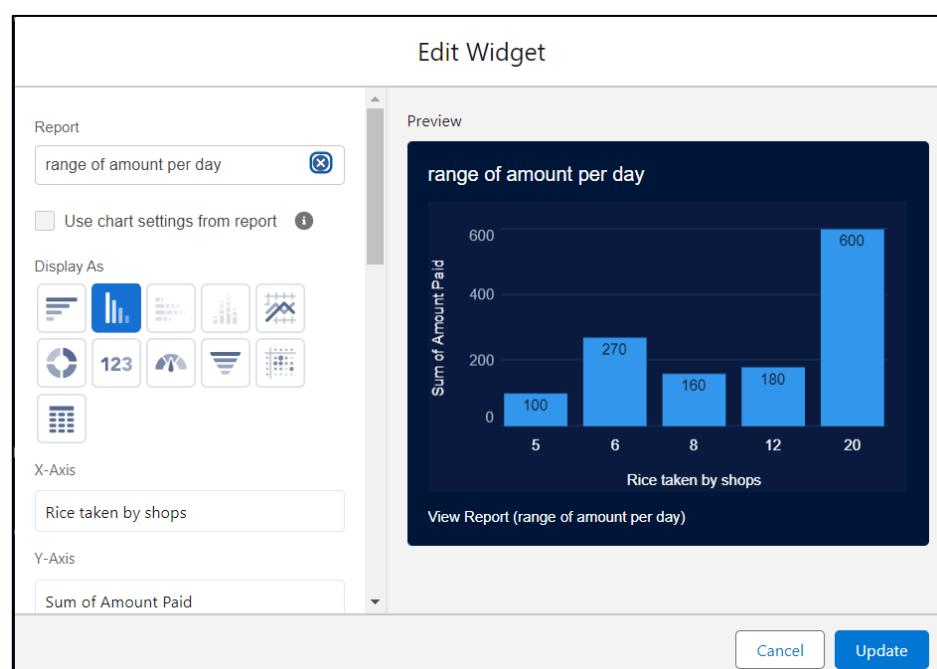
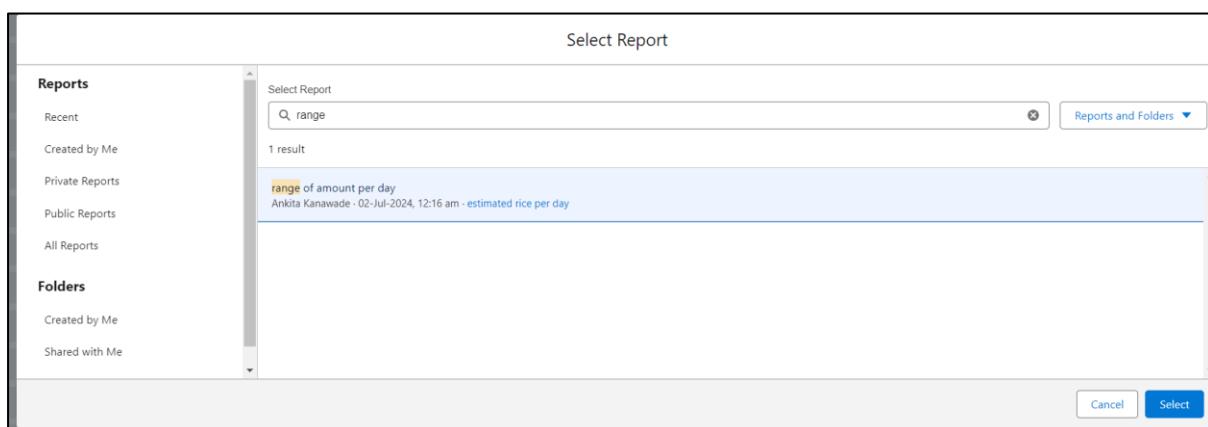
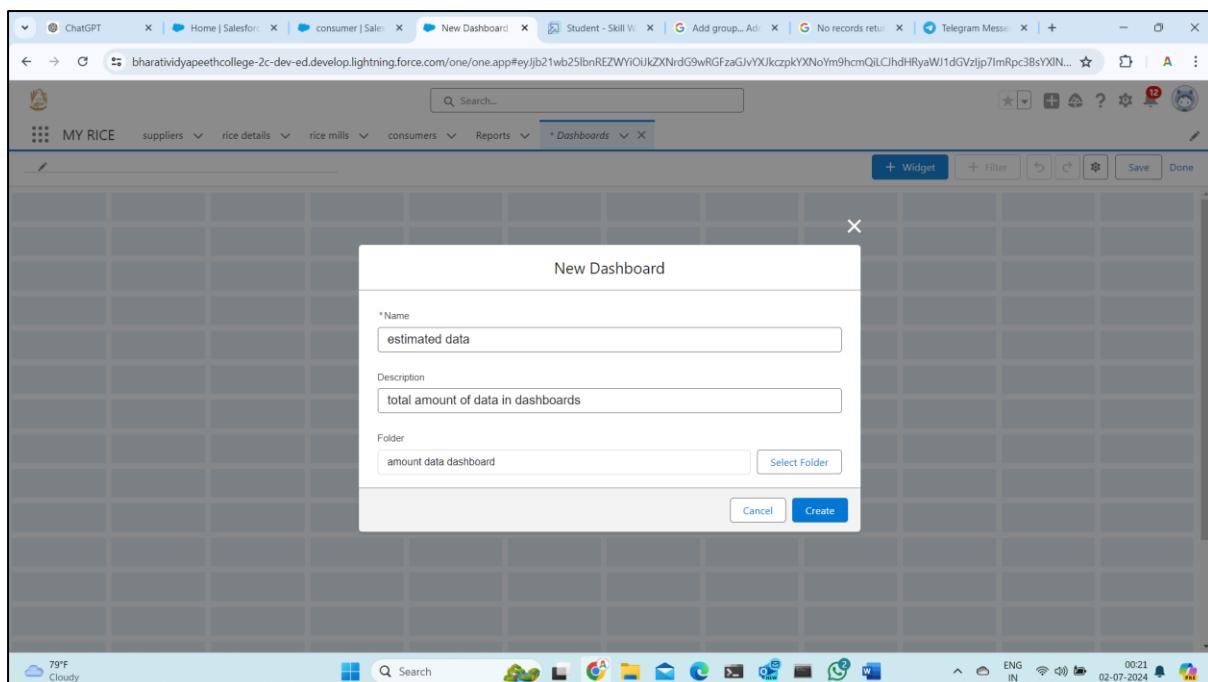
- Go to the Dashboards tab > New Folder.
- Name it "Amount Data Dashboard" to store related dashboards.
- Save to create a new organizational folder.

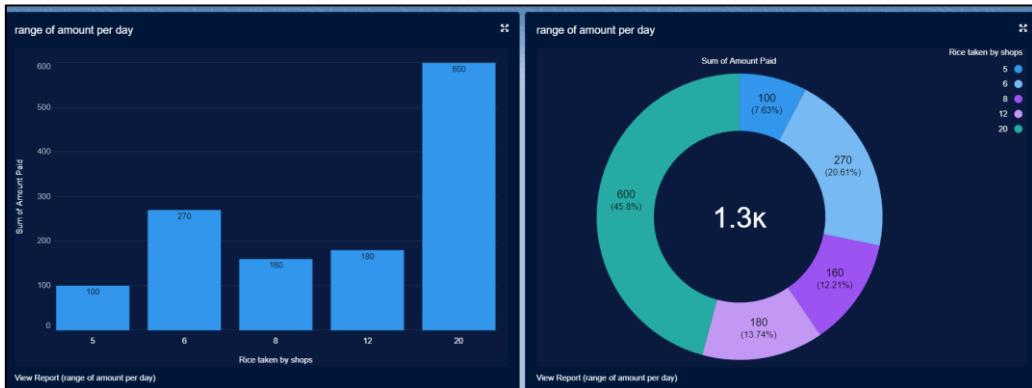
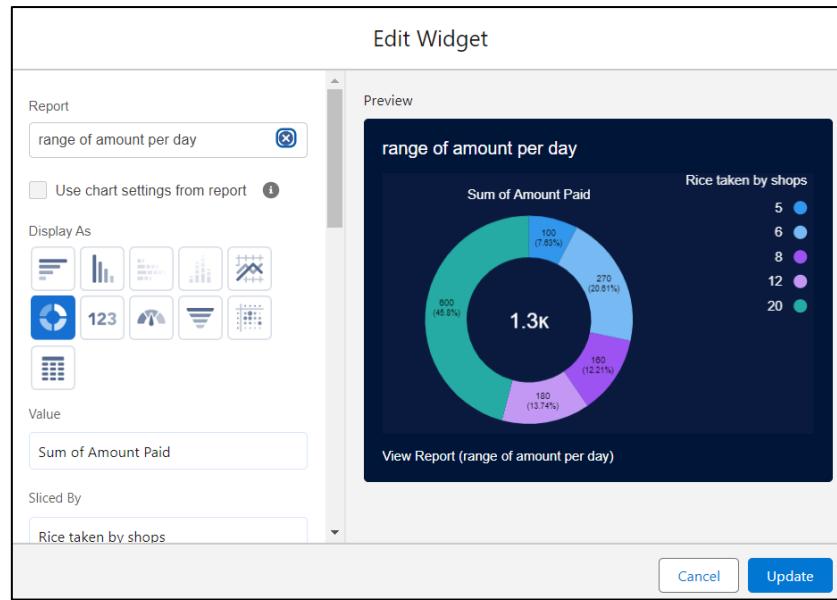


Activity 2: Create Dashboard

- Go to Dashboards > New Dashboard.
- Name the dashboard and select the folder.
- Add components using reports like vertical bar charts and donut charts.
- Customize display options and themes.
- Save and finalize the dashboard.







Conclusion:

The CRM application developed for our wholesale rice mill has revolutionized how we manage operations, customer relationships, and data insights. From initial design to implementation, the project aimed to streamline processes and optimize efficiency across all facets of our business.

- Custom Object Design:** We meticulously crafted custom objects such as Consumer, Rice Details, and Suppliers, tailored to capture and manage specific data points critical to our operations.
- Workflow Automation:** Leveraging Salesforce workflows, we automated key processes like order processing, inventory management, and customer communications, reducing manual effort and enhancing accuracy.
- Enhanced User Experience:** Through intuitive page layouts and customized fields, we ensured that every user interaction within Salesforce is efficient, intuitive, and aligned with our operational needs.
- Role-Based Access Control:** Establishing role hierarchies—from owners to workers—ensured that data visibility and access permissions were finely tuned to individual job functions, safeguarding data integrity and confidentiality.
- Analytics and Reporting:** The integration of various report types—Tabular, Summary, Matrix—empowered us to extract actionable insights into sales trends,

inventory levels, and customer preferences, facilitating informed decision-making at all levels of the organization.

6. **Visual Dashboards for Insights:** Dynamic dashboards visually represented critical metrics and KPIs, allowing stakeholders to monitor performance, identify trends, and react swiftly to market changes.
7. **Collaborative Efficiency:** The CRM's capability to share reports, collaborate on data insights, and subscribe to automated updates improved team collaboration, ensuring everyone had access to real-time information crucial for their roles.
8. **Continuous Improvement:** As we move forward, ongoing refinements and enhancements based on user feedback and evolving business needs will further optimize our CRM application, ensuring it remains a strategic asset in our quest for operational excellence.

In conclusion, our CRM application has not only transformed how we manage our wholesale rice business but also positioned us for sustained growth and competitiveness in the market. By harnessing Salesforce's robust capabilities, we have built a scalable, adaptable platform that supports our mission to deliver quality products and exceptional service to our valued customers.

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