A CRM APPLICATION FOR WHOLESALE RICE MILL

Submitted By:

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Milestone 1-Salesforce

Activity 1: Creating Developer Account:

- **Visited the Salesforce Developer Sign-Up Page**
I opened my web browser and navigated to the [Salesforce Developer Sign-Up Page](#).

- **Filled Out the Sign-Up Form**
I entered the following details in the sign-up form:

  - **First Name:** Kartik
  - **Last Name:** Soni
  - **Email Address:** kattosoni@gmail.com
  - **Job Role:** Developer
  - **Company:** Lovely professional university
  - **Country:** United States
  - **Postal Code:** 90080
  - **Username:** kattosoni98723@gmail.com

- **Submitted the Form**
After filling out the form, I clicked the "Sign Me Up" button to submit my information.
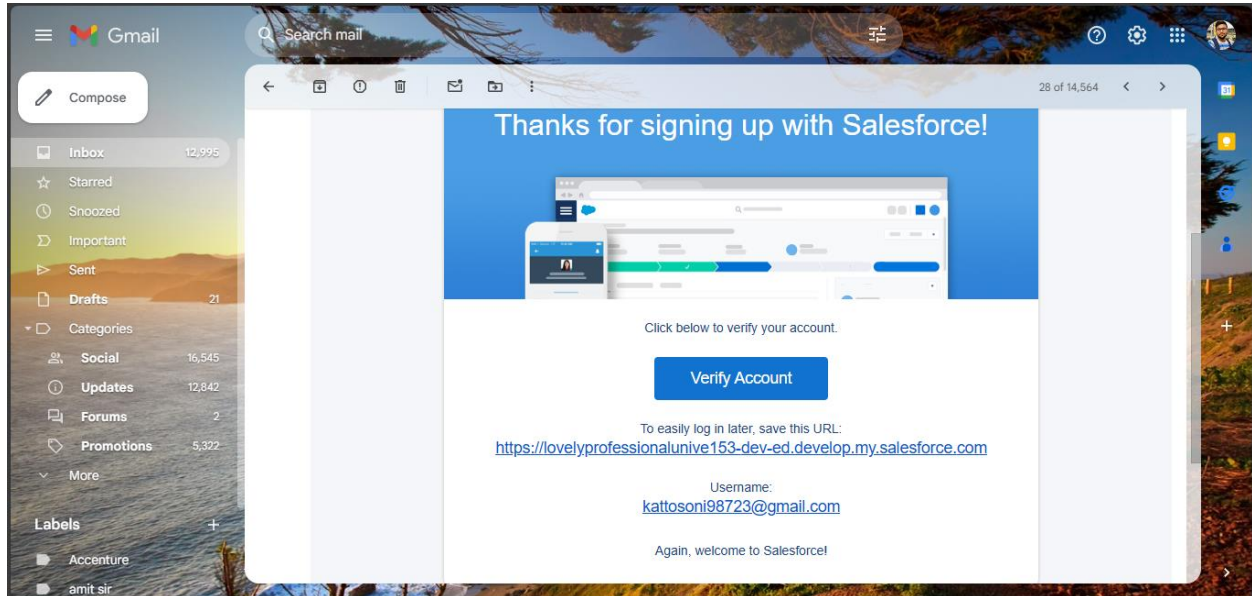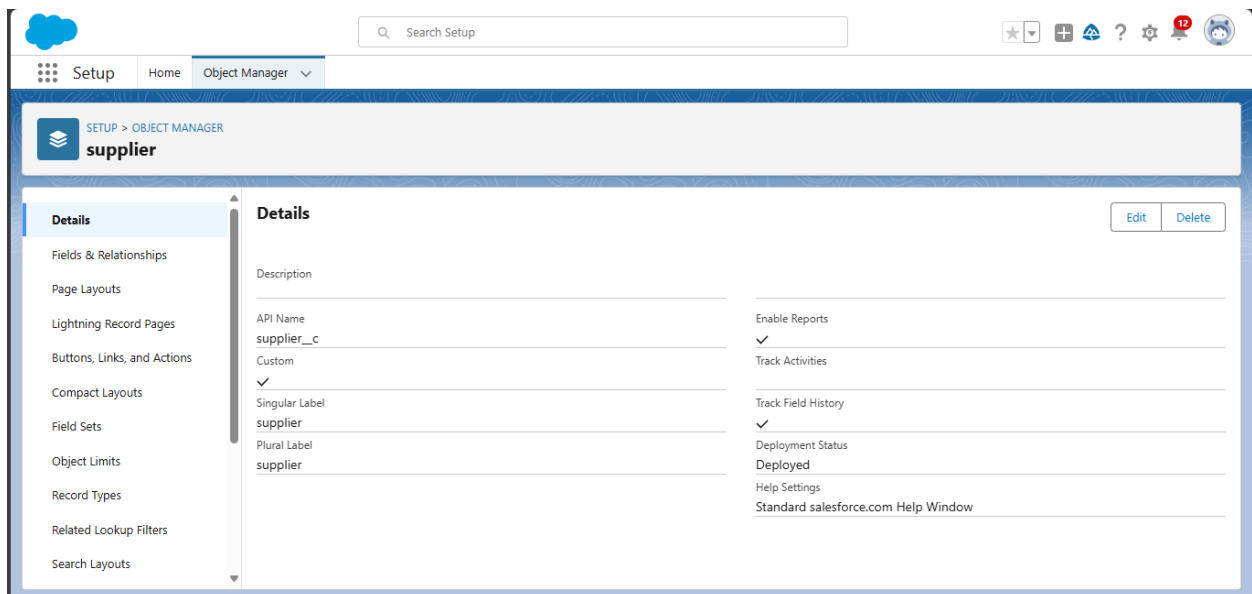
Activity 2: Account Activation:

Checked for Confirmation Email

I checked my email inbox for a confirmation email from Salesforce. Upon receiving it, I clicked the confirmation link in the email to activate my Salesforce Developer account.

Milestone 2- Object

Activity 1: Create Supplier Object

1. **Navigated to Object Manager**
   From the setup page, I clicked on "Object Manager."

2. **Created a New Custom Object**
   I clicked on "Create" and then selected "Custom Object."

3. **Entered Object Details**

   o **Label Name:** Supplier

   o **Plural Label Name:** Suppliers

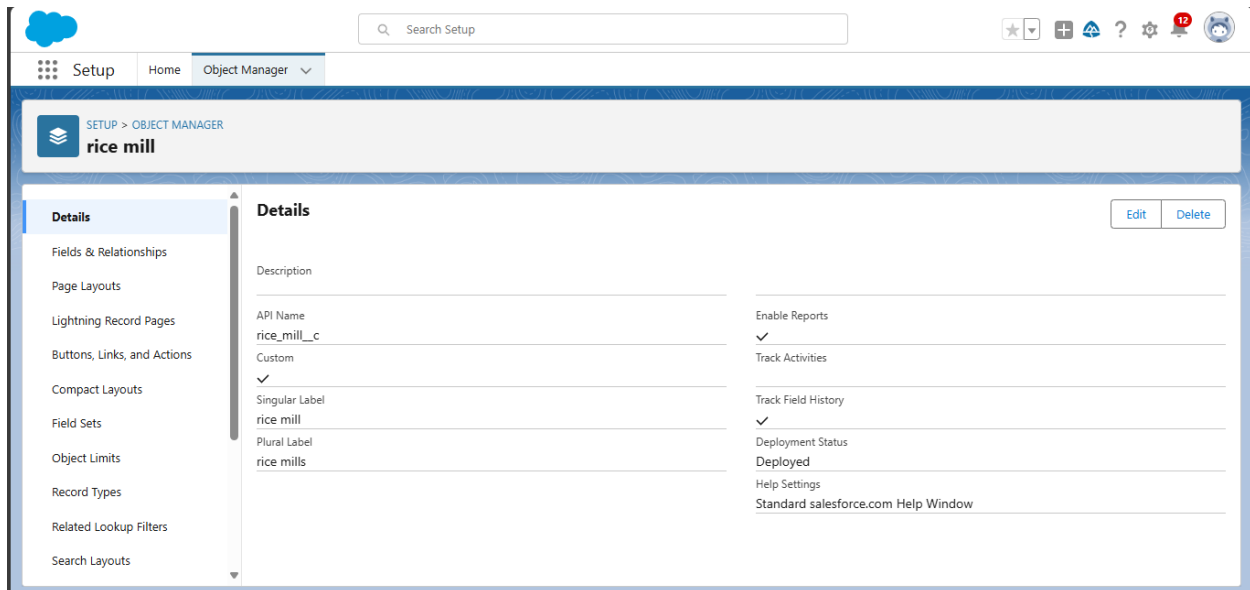   o **Record Name:** Supplier Name

   o **Data Type:** Text

4. **Configured Object Settings**
   I selected "Allow Reports" and "Track Field History" options, and enabled "Allow Search."

5. **Saved the Object**
   I clicked on the "Save" button to create the Supplier object.

Activity 2: Create Rice Mill Object

1. **Navigated to Object Manager**
   From the setup page, I clicked on "Object Manager."

2. **Created a New Custom Object**
   I clicked on "Create" and then selected "Custom Object."

3. **Entered Object Details**

   o **Label Name:** Rice Mill

- o **Plural Label Name:** Rice Mills

- o **Record Name:** Rice Mill Number

- o **Data Type:** Auto Number

- o **Display Format:** rice-{000}

- o **Starting Number:** 1

4. **Configured Object Settings**
   I selected "Allow Reports" and "Track Field History" options, and enabled "Allow Search."

5. **Saved the Object**
   I clicked on the "Save" button to create the Rice Mill object.
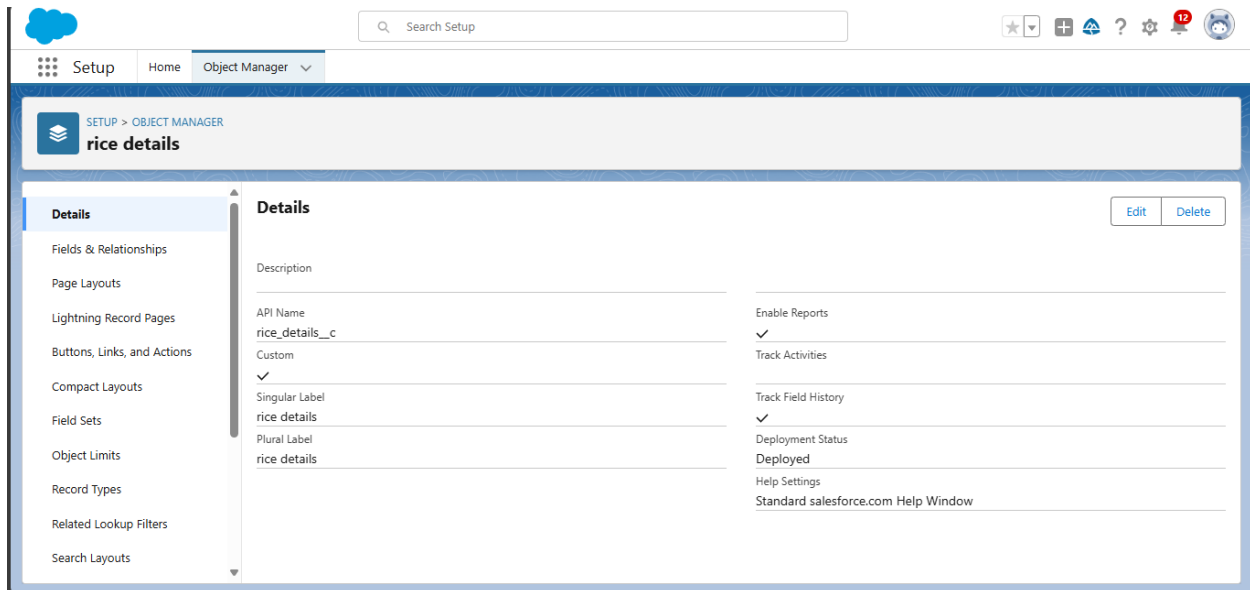
Activity 3: Create Consumer Object
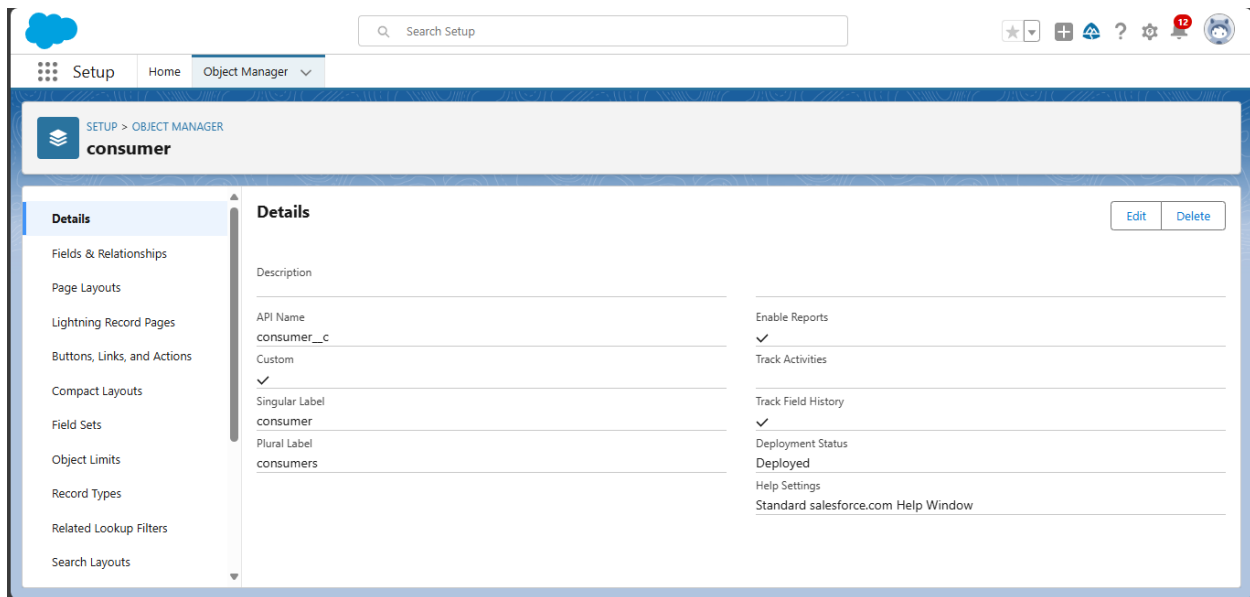
1. **Followed the Steps from Activity 2**
   I followed the same steps as mentioned in Activity 2 for creating the Consumer object.

2. **Entered Object Details**

- o **Label Name:** Consumer

- o **Plural Label Name:** Consumers

- o **Record Name:** Consumer Number

- o **Data Type:** Auto Number

- o **Display Format:** consumers-{000}

- o **Starting Number:** 1

3. **Configured Object Settings**
   I selected "Allow Reports" and "Track Field History" options, and enabled "Allow Search."

4. **Saved the Object**
   I clicked on the "Save" button to create the Consumer object.

Activity 4: Create Rice Details Object

1. **Followed the Steps from Activity 2**
   I followed the same steps as mentioned in Activity 2 for creating the Rice Details object.

2. **Entered Object Details**

   - o **Label Name:** Rice Details

   - o **Plural Label Name:** Rice Details

   - o **Record Name:** Rice Detail Number

   - o **Data Type:** Auto Number

   - o **Display Format:** rice-{000}

   - o **Starting Number:** 1

3. **Configured Object Settings**
   I selected "Allow Reports" and "Track Field History" options, and enabled "Allow Search."

4. **Saved the Object**
   I clicked on the "Save" button to create the Rice Details object.

Milestone 3- Tabs

Activity 1: Creating Custom Tabs
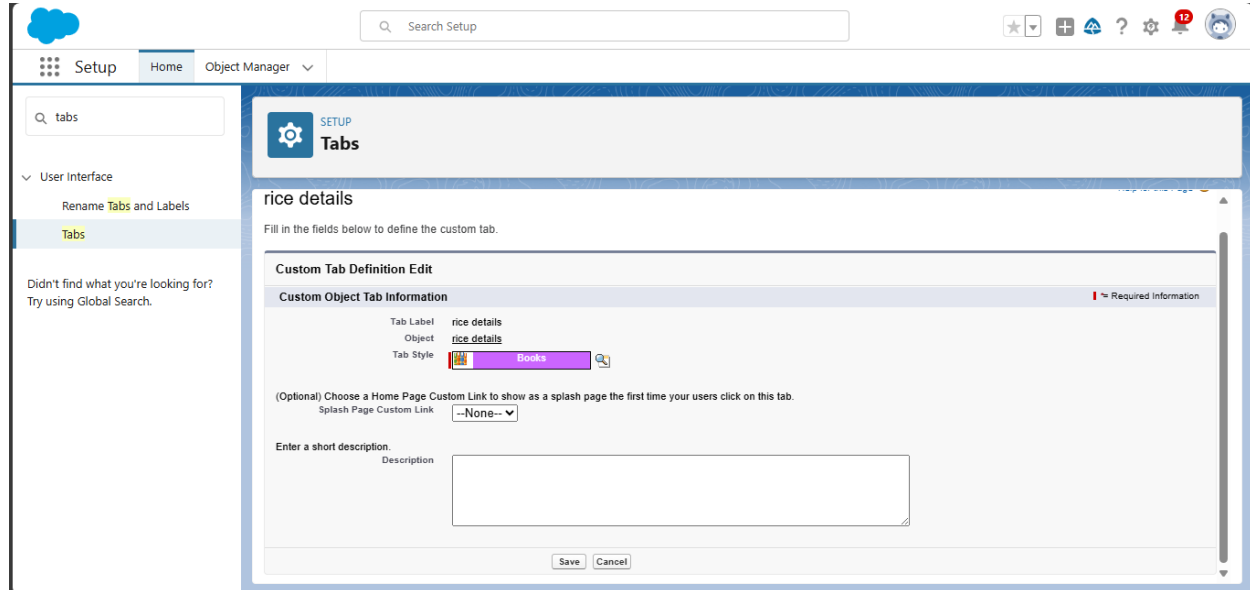
Creating a Tab for Supplier
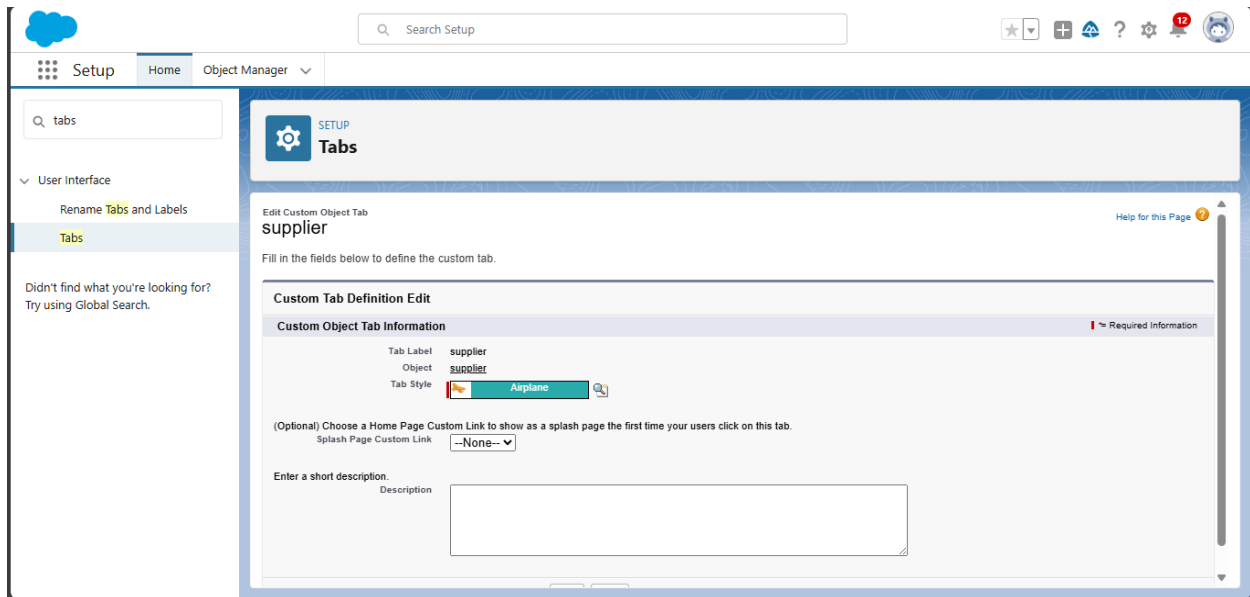
1. **Navigated to Tabs Setup**
   From the setup page, I typed "Tabs" in the Quick Find bar and clicked on "Tabs."
2. **Created a New Custom Object Tab**
   I clicked on "New" under the Custom Object Tabs section.
3. **Selected Object and Tab Style**
   - **Selected Object:** Supplier
   - **Selected Tab Style:** Airplane
   - Clicked "Next" on the Add to Profiles page, keeping it as default.
   - Clicked "Next" on the Add to Custom App page, unchecking the "Include Tab" option.
4. **Finalized Tab Settings**
   Ensured that the "Append tab to users' existing personal customizations" option was checked.
5. **Saved the Tab**
   I clicked on the "Save" button to create the Supplier tab.

Creating a Tab for Consumer

1. **Navigated to Tabs Setup**
   From the setup page, I typed "Tabs" in the Quick Find bar and clicked on "Tabs."
2. **Created a New Custom Object Tab**
   I clicked on "New" under the Custom Object Tabs section.
3. **Selected Object and Tab Style**
   o **Selected Object:** Consumer
   o **Selected Tab Style:** people
   o Clicked "Next" on the Add to Profiles page, keeping it as default.
   o Clicked "Next" on the Add to Custom App page, unchecking the "Include Tab" option.
4. **Finalized Tab Settings**
   Ensured that the "Append tab to users' existing personal customizations" option was checked.
5. **Saved the Tab**
   I clicked on the "Save" button to create the Consumer tab.

Creating a Tab for Rice Mill

1. **Navigated to Tabs Setup**
   From the setup page, I typed "Tabs" in the Quick Find bar and clicked on "Tabs."
2. **Created a New Custom Object Tab**
   I clicked on "New" under the Custom Object Tabs section.
3. **Selected Object and Tab Style**
   o **Selected Object:** Rice Mill
   o **Selected Tab Style:** Building
   o Clicked "Next" on the Add to Profiles page, keeping it as default.
   o Clicked "Next" on the Add to Custom App page, unchecking the "Include Tab" option.
4. **Finalized Tab Settings**
   Ensured that the "Append tab to users' existing personal customizations" option was checked.
5. **Saved the Tab**
   I clicked on the "Save" button to create the Rice Mill tab.

Creating a Tab for Rice Details

1. **Navigated to Tabs Setup**
   From the setup page, I typed "Tabs" in the Quick Find bar and clicked on "Tabs."
2. **Created a New Custom Object Tab**
   I clicked on "New" under the Custom Object Tabs section.
3. **Selected Object and Tab Style**
   o **Selected Object:** Rice Details
   o **Selected Tab Style:** Books
   o Clicked "Next" on the Add to Profiles page, keeping it as default.
   o Clicked "Next" on the Add to Custom App page, unchecking the "Include Tab" option.
4. **Finalized Tab Settings**
   Ensured that the "Append tab to users' existing personal customizations" option was checked.
5. **Saved the Tab**
   I clicked on the "Save" button to create the Rice Details tab.

Milestone 4- The Lightning App

Activity 1: Create a Lightning App

Creating a Lightning App Page

1. **Navigated to App Manager**
   From the setup page, I searched for "App Manager" in the Quick Find bar and selected "App Manager."
2. **Created a New Lightning App**
   I clicked on "New Lightning App."
3. **Filled Out App Details**
   o **App Name:** MY RICE
   o Clicked "Next."
4. **Configured App Options**
   o Kept all options on the App Options page as default.
   o Clicked "Next."
5. **Configured Utility Items**
   o Kept all options on the Utility Items page as default.
   o Clicked "Next."
6. **Uploaded a Photo for the App**
   I uploaded a photo that is related to the MY RICE app.
7. **Added Navigation Items**
   o I selected the following items from the search bar and moved them using the arrow button:
      ▪ Supplier
      ▪ Rice Mill
      ▪ Consumer
      ▪ Rice Details

o Clicked "Next."
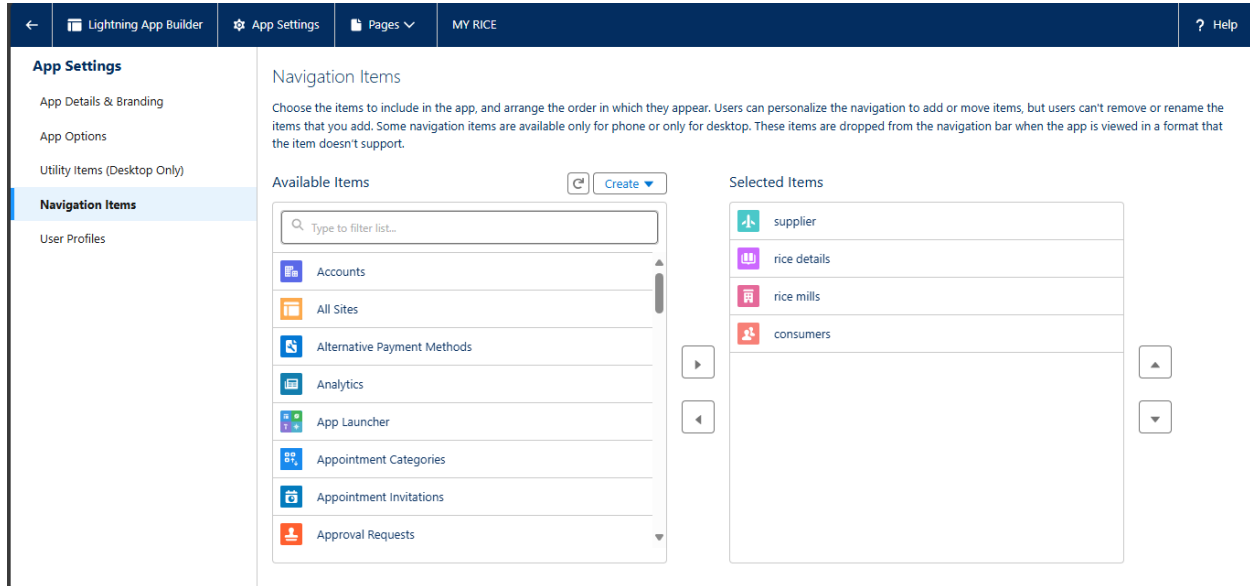
8. **Added User Profiles**
    o I searched for "System Administrator" in the search bar.
    o Clicked on the arrow button to add the profile.
    o Clicked "Save & Finish."
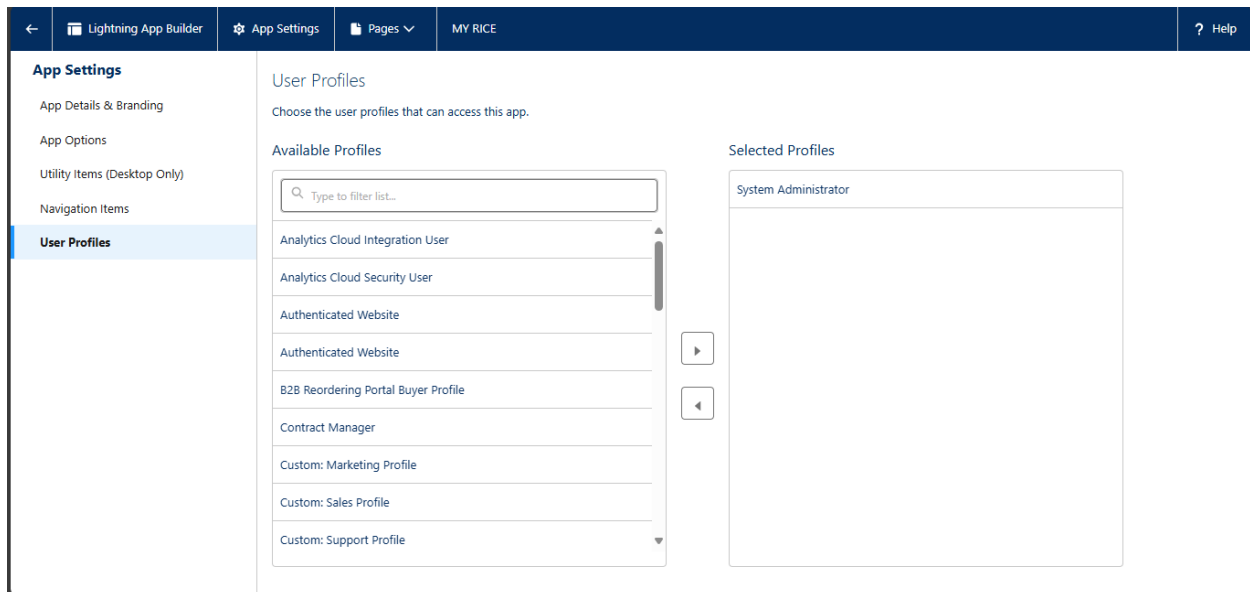
Final Output of MY RICE app (Screenshot)
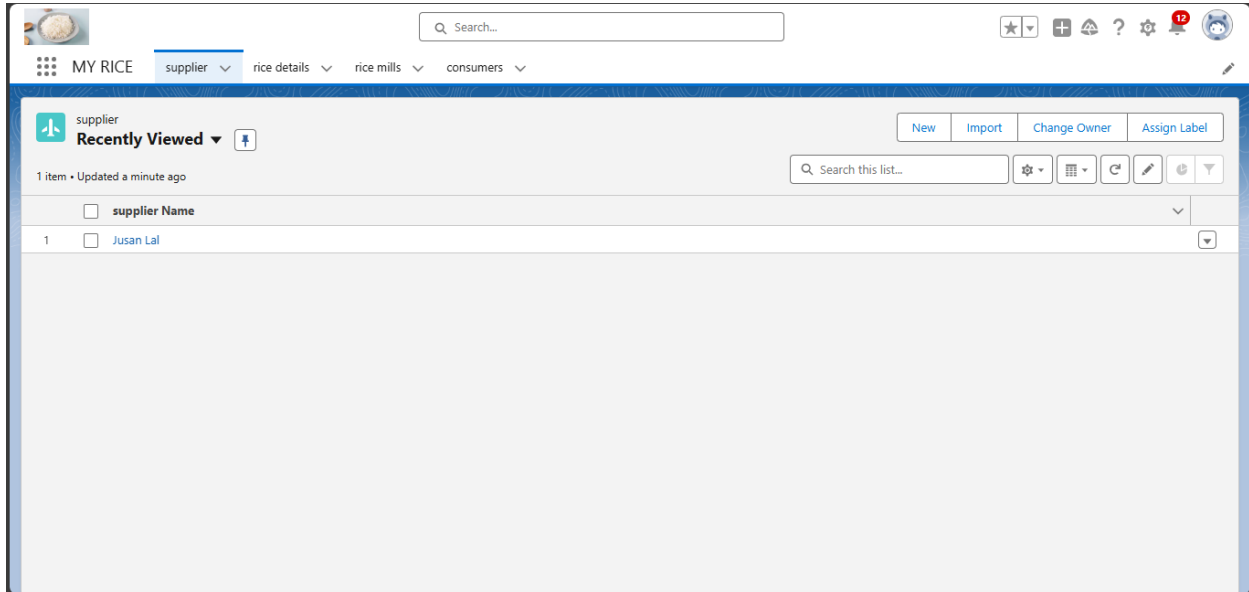
Milestone 5 : Fields

Activity 1: Creating the Number Field in Rice Details Object
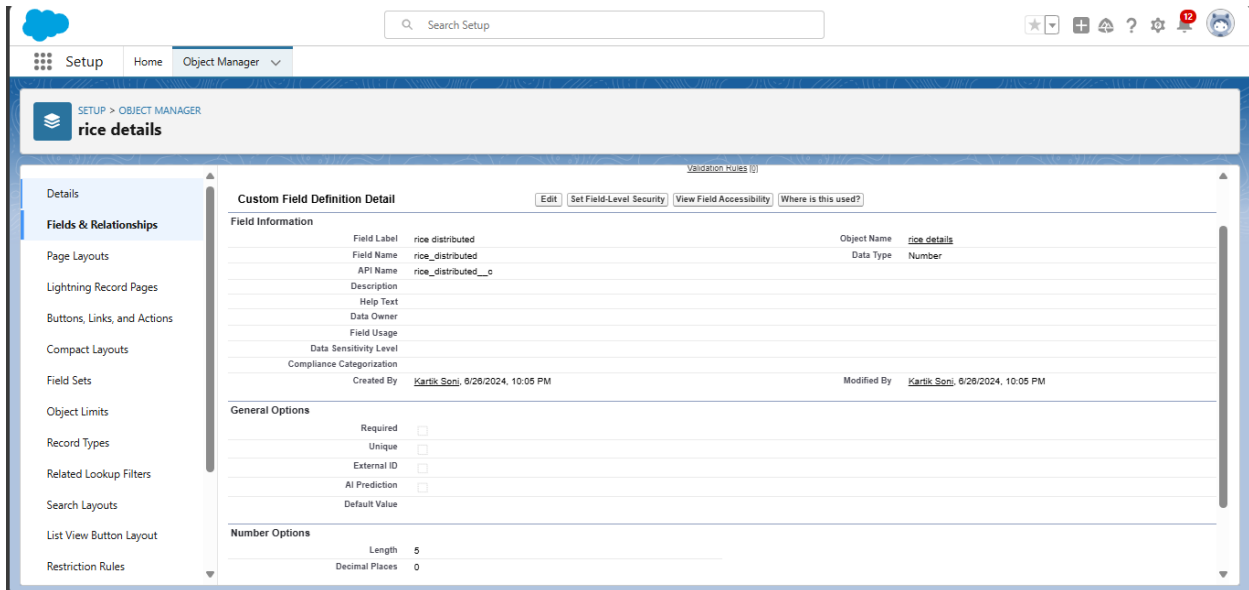
1. **Navigated to Rice Details Object**
   From the setup page, I clicked on "Object Manager," then from the dropdown, I selected and edited the Rice Details object.
2. **Created a New Field**
   I clicked on "Fields & Relationships" and then clicked on "New."

3. **Selected Data Type**
   I selected "Number" as the data type and clicked "Next."
4. **Entered Field Details**
   - **Field Label:** Rice Distributed
   - **Length:** 5
   - The Field Name was auto-populated.
   - Clicked "Next," "Next," and then "Save."

Activity 2: Creating Junction Object: Rice Details with Supplier & Rice Mill

Creating Master-Detail Relationship with Supplier

1. **Navigated to Rice Details Object**
   From the setup page, I clicked on "Object Manager," then from the dropdown, I selected and edited the Rice Details object.
2. **Created a New Field**
   I clicked on "Fields & Relationships" and then clicked on "New."
3. **Selected Data Type**
   I selected "Master-Detail Relationship" as the data type and clicked "Next."
4. **Selected Related Object**
   I selected "Supplier" as the related object and clicked "Next."
5. **Entered Field Details**
   - **Field Label:** Supplier Name
   - Clicked "Next," "Next," and then "Save & New."

Creating Master-Detail Relationship with Rice Mill

6. **Repeated Steps for Rice Mill**
   I followed the same steps from 1 to 3.
7. **Selected Related Object**
   I selected "Rice Mill" as the related object and clicked "Next."
8. **Entered Field Details**
   o **Field Label:** Rice Mill 1 (One)
   o Clicked "Next," "Next," and then "Save."

Activity 3: Creating a Master-Detail Relationship between Consumer & Rice Mill Object

1. **Navigated to Consumer Object**
   From the setup page, I clicked on "Object Manager," then from the dropdown, I selected and edited the Consumer object.
2. **Created a New Field**
   I clicked on "Fields & Relationships" and then clicked on "New."
3. **Selected Data Type**
   I selected "Master-Detail Relationship" as the data type and clicked "Next."
4. **Selected Related Object**
   I selected "Rice Mill" as the related object.
5. **Entered Field Details**
   o **Field Label:** Rice Mill Name
   o Clicked "Next," "Next," and then "Save."

Activity 4: Creating the Roll-Up Summary Field

Creating Roll-Up Summary on Supplier Object

1. **Navigated to Supplier Object**
   From the setup page, I clicked on "Object Manager," typed "Supplier" in the search bar, and clicked on the object.
2. **Created a New Field**
   I clicked on "Fields & Relationships" and then clicked on "New."
3. **Selected Data Type**
   I selected "Roll-Up Summary" as the data type and clicked "Next."
4. **Entered Field Details**
   o **Field Label:** Sum of Rice Distributed
   o The Field Name was auto-generated.
   o Clicked "Next."
5. **Configured Roll-Up Summary**
   o **Summarized Object:** Rice Details
   o **Roll-Up Type:** Sum
   o **Field to Aggregate:** Rice Distributed
   o Clicked "Next," "Next," and then "Save."

Creating Roll-Up Summary on Rice Mill Object

6. **Repeated Steps for Rice Mill Object**
    I followed the same steps from 1 to 3.
7. **Entered Field Details**
    o   **Field Label:** Rice Distributed to Shops
    o   The Field Name was auto-generated.
    o   Clicked "Next."
8. **Configured Roll-Up Summary**
    o   **Summarized Object:** Rice Details
    o   **Roll-Up Type:** Sum
    o   **Field to Aggregate:** Rice Distributed
    o   Clicked "Next," "Next," and then "Save."

Creating the Field "Rice Taken by Shops" in Consumer Object

o   I created "Rice Taken by Shops" field in Consumer Object at activity 4 point number 9.

Creating Roll-Up Summary on Rice Mill Object

9. **Repeated Steps for Rice Mill Object**
   I followed the same steps from 1 to 3.
10. **Entered Field Details**
    o **Field Label:** Rice Taken
    o The Field Name was auto-generated.
    o Clicked "Next."
11. **Configured Roll-Up Summary**
    o **Summarized Object:** Consumer
    o **Roll-Up Type:** Sum
    o **Field to Aggregate:** Rice Taken in Shops
    o Clicked "Next," "Next," and then "Save."

Activity 5: Creating Fields in Rice Details Object

1. **Navigated to Rice Details Object**
   From the setup page, I clicked on "Object Manager," then from the dropdown, I selected and edited the Rice Details object.
2. **Created a New Field**
   I clicked on "Fields & Relationships" and then clicked on "New."
3. **Selected Data Type**
   I selected "Number" as the data type and clicked "Next."
4. **Entered Field Details**
   - **Field Label:** Supplier Name
   - **Length:** 5
   - The Field Name was auto-populated.
   - Clicked "Next," "Next," and then "Save."

Activity 6: Creating Fields in Rice Mill Object

1. **Selected Data Type**
   I selected "Number" as the data type and clicked "Next."
2. **Entered Field Details**
   o **Field Label:** Rice Price/Kg
   o **Length:** 5
   o Clicked "Next," "Next," and then "Save."

Activity 7: Creating Fields in Consumer Object

1. **Field Details**

- First Name: Text
- Last Name: Text
- Phone Number: Phone
- Email: Email
- Rice Taken by Shops: Number (Length = 5)
- Rice Type: Picklist
  - Basmati
  - Normal Rice
- Mode of Payment: Picklist
  - Credit Card
  - Debit Card
  - Net Banking
  - UPI
  - Cash

Activity 8: Creating Cross-Object Formula Field in Consumer Object

Creating "Amount Paid" Formula Field

1. **Navigated to Consumer Object**
   From the setup page, I clicked on "Object Manager," typed "Consumer" in the search bar, and clicked on the object.
2. **Created a New Field**
   I clicked on "Fields & Relationships" and then clicked on "New."
3. **Selected Data Type**
   I selected "Formula" as the data type and clicked "Next."
4. **Entered Field Details**
   o **Field Label:** Amount Paid
   o **Field Name:** Amount Paid
   o **Formula Return Type:** Number
   o Clicked "Next."
5. **Inserted Formula**
   o Formula: `rice_taken_by_shops__c *`
     `rice_mill_name__r.rice_price_kg__c`
   o Clicked "Check Syntax" and then "Save."

Creating "Consumer Name" Formula Field

6. **Repeated Steps for Consumer Name**
   I followed the same steps from 1 to 3.
7. **Entered Field Details**
   - o **Field Label:** Consumer Name
   - o **Field Name:** Consumer Name
   - o **Formula Return Type:** Text
   - o Clicked "Next."
8. **Inserted Formula**
   - o Formula: `First_Name__c + ' ' + Last_Name__c`
   - o Clicked "Check Syntax" and then "Save."

Activity 9: Creating the Validation Rule for Phone Number Field in Consumer Object
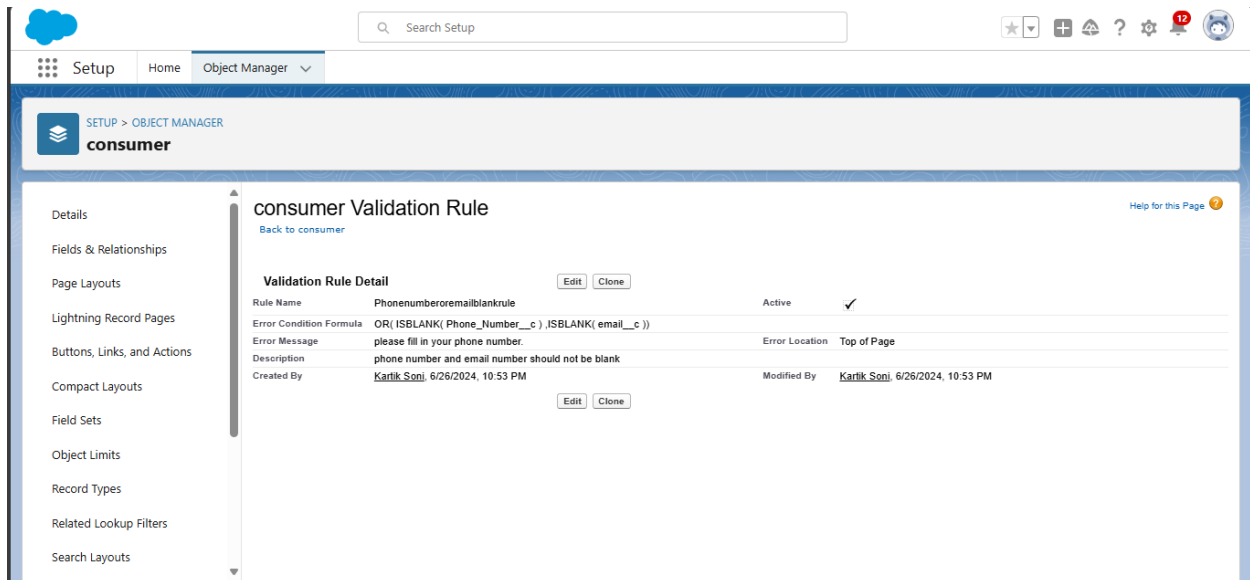
1. **Navigated to Consumer Object**
   From the setup page, I clicked on "Object Manager," then from the dropdown, I selected and edited the Consumer object.
2. **Created a New Validation Rule**
   I clicked on "Validation Rules" and then clicked "New."
3. **Entered Rule Details**
   - **Rule Name:** Phonenumberoremailblankrule
   - **Description:** Phone number and email number should not be blank.
   - **Formula:** OR(ISBLANK(phone_number__c), ISBLANK(email__c))
   - Clicked "Check Syntax."
4. **Configured Error Message**
   - **Error Message:** Please fill in your phone number.
   - **Error Location:** Top of Page
   - Clicked "Save."

Milestone 6 : Page layouts

Activity 1: Creating the Page Layout

To Create a Page Layout for the Consumer Object
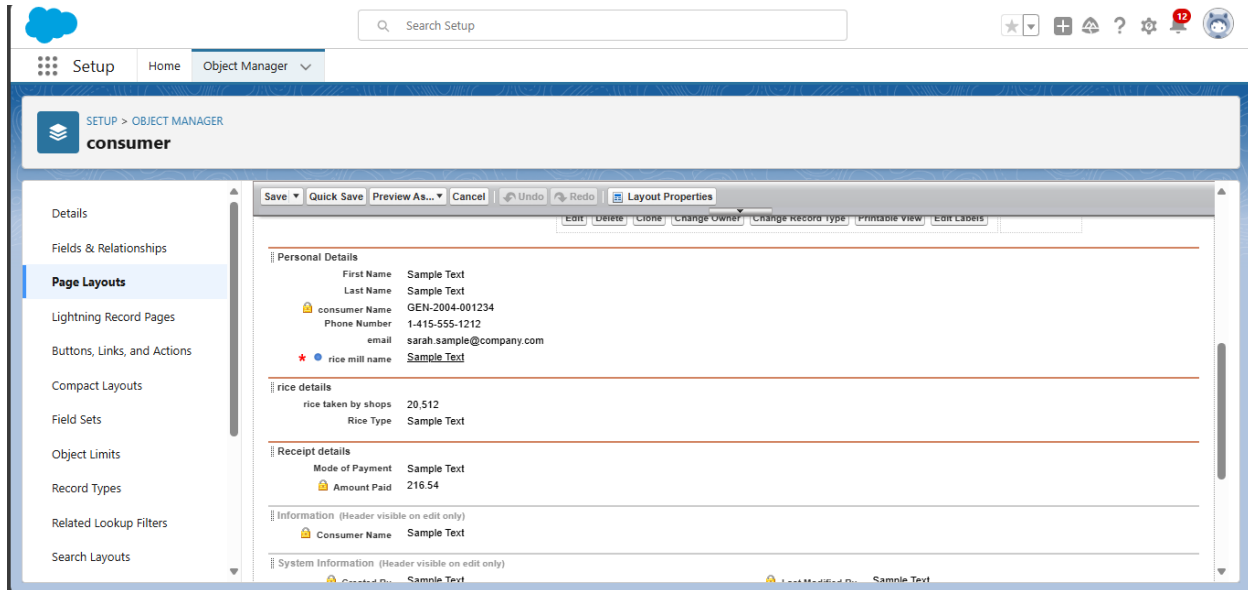
1. **Navigated to the Consumer Object**
   - From the setup page, I clicked on "Object Manager."
   - Searched for the "Consumer" object and selected it from the dropdown.
2. **Created a New Page Layout**
   - Clicked on "Page Layouts."
   - Clicked on "New."
3. **Configured the Page Layout**
   - Selected the existing page layout.
   - Entered the Page Layout Name as "Customer Layout."
   - Clicked "Save."
4. **Created and Configured the "Personal Details" Section**
   - Dragged and dropped the section field to the Consumer details area.
   - Named the section "Personal Details" and clicked "Ok."
5. **Added Fields to "Personal Details" Section**
   - Dragged and dropped the following fields into the "Personal Details" section:
     - First Name
     - Last Name
     - Consumer Name
     - Phone Number
     - Email
     - Rice Mill Name
6. **Created and Configured the "Rice Details" Section**
   - Created a new section named "Rice Details" and clicked "Ok."

- o Dragged and dropped the following fields into the "Rice Details" section:
  - ▪ Rice Taken by Shop
  - ▪ Rice Type
- 7. **Created and Configured the "Receipt Details" Section**
  - o Created a new section named "Receipt Details" and clicked "Ok."
  - o Dragged and dropped the following fields into the "Receipt Details" section:
    - ▪ Mode of Payment
    - ▪ Amount Paid
- 8. **Saved the Page Layout**
  - o Clicked "Save" to save the new customer Layout.

Milestone 7 : Profiles

Activity 1: Creating the Owner Profile

1. **Navigated to Profiles**
   - o From the setup page, I typed "Profiles" in the Quick Find box and clicked on "Profiles."
2. **Cloned the Standard User Profile**
   - o Selected the "Standard User" profile and clicked "Clone."
   - o Entered the Profile Name as "Owner."
   - o Clicked "Save."
3. **Configured Custom Object Permissions**
   - o Scrolled down to "Custom Object Permissions."
   - o Gave access permissions for the following objects:
     - ▪ Consumers
     - ▪ Rice Details
     - ▪ Rice Mill
     - ▪ Suppliers
   - o Configured permissions according to the image provided.

4. **Saved the Profile**
   - o Clicked "Save" to apply the permissions.

Activity 2: Creating the Employer Profile

1. **Navigated to Profiles**
   - o From the setup page, I typed "Profiles" in the Quick Find box and clicked on "Profiles."
2. **Cloned the Standard Platform User Profile**
   - o Selected the "Standard Platform User" profile and clicked "Clone."
   - o Entered the Profile Name as "Employer."
   - o Clicked "Save."
3. **Edited the Profile Settings**
   - o While still on the profile page, clicked "Edit."
4. **Configured Custom App Settings**
   - o Selected the Custom App settings as default for the Rice Mill.
5. **Configured Custom Object Permissions**
   - o Scrolled down to "Custom Object Permissions."
   - o Gave access permissions for the following objects:
     - ▪ Consumers
     - ▪ Rice Details
     - ▪ Rice Mill
     - ▪ Suppliers
   - o Configured permissions according to the image provided.

6. **Saved the Profile**
   - o Clicked "Save" to apply the permissions.

Activity 3: Creating the Worker Profile

1. **Navigated to Profiles**
   - From the setup page, I typed "Profiles" in the Quick Find box and clicked on "Profiles."
2. **Cloned the Standard Platform User Profile**
   - Selected the "Standard Platform User" profile and clicked "Clone."
   - Entered the Profile Name as "Worker."
   - Clicked "Save."
3. **Edited the Profile Settings**
   - While still on the profile page, clicked "Edit."
4. **Configured Custom App Settings**
   - Selected the Custom App settings as default for the Rice Mill.
5. **Configured Custom Object Permissions**
   - Scrolled down to "Custom Object Permissions."
   - Gave access permissions for the following objects:
     - Consumers
     - Rice Details
     - Rice Mill
     - Suppliers
   - Configured permissions according to the image provided.
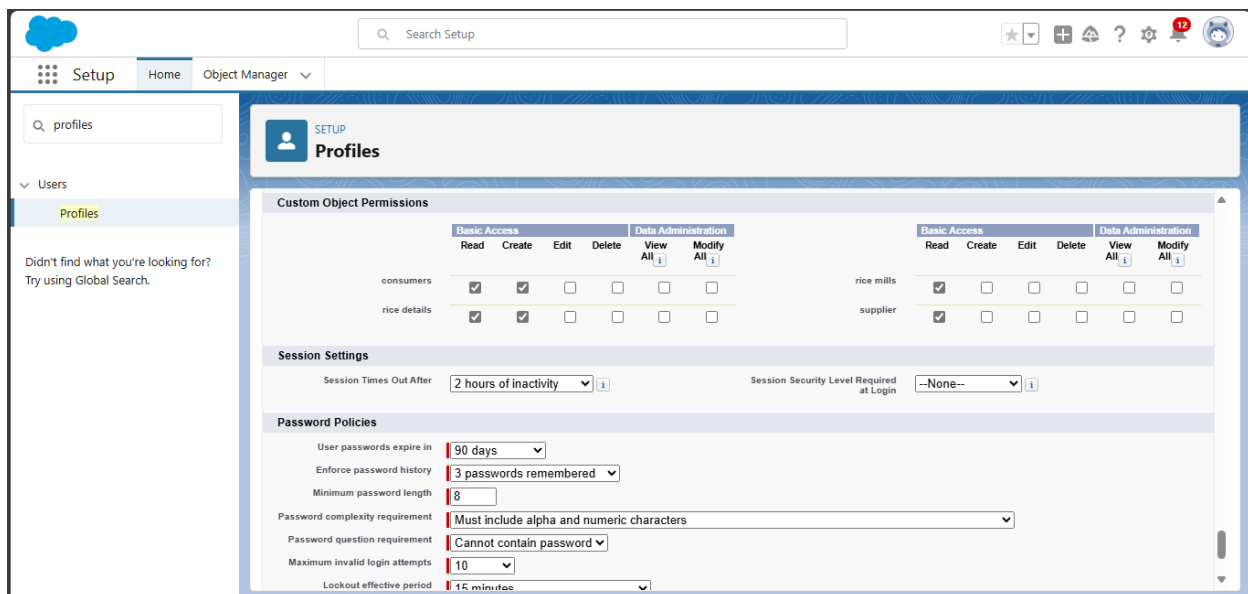
6. **Saved the Profile**
   - Clicked "Save" to apply the permissions.

Milestone 8 : Role & Role Hierarchy

Activity 1: Creating the Owner Role

1. **Navigated to Roles**
   o From the setup page, I typed "Roles" in the Quick Find box and clicked on "Set Up Roles."
2. **Expanded All Roles**
   o Clicked on "Expand All" to view the hierarchy of roles.
3. **Added the Owner Role**
   o Clicked on "Add Role" under the role to whom this role works.
   o Entered the Label as "Owner," and the Role Name was auto-populated.
   o Clicked "Save."
4. **Saved the Role**
   o Clicked "Save" to finalize the creation of the Owner role.

Activity 2: Creating Employer and Worker Roles

1. **Navigated to Roles**
   o From the setup page, I typed "Roles" in the Quick Find box and clicked on "Set Up Roles."
2. **Added the Employer Role**
   o Clicked the plus (+) sign on the CEO role.
   o Clicked "Add Role" under the Owner.
   o Entered the Label as "Employer," and the Role Name was auto-populated.
   o Clicked "Save."
3. **Added the Worker Role**
   o Clicked the plus (+) sign on the CEO role.
   o Clicked the plus (+) sign on the Owner role.
   o Clicked "Add Role" under the Employer.
   o Entered the Label as "Worker," and the Role Name was auto-populated.
   o Clicked "Save."
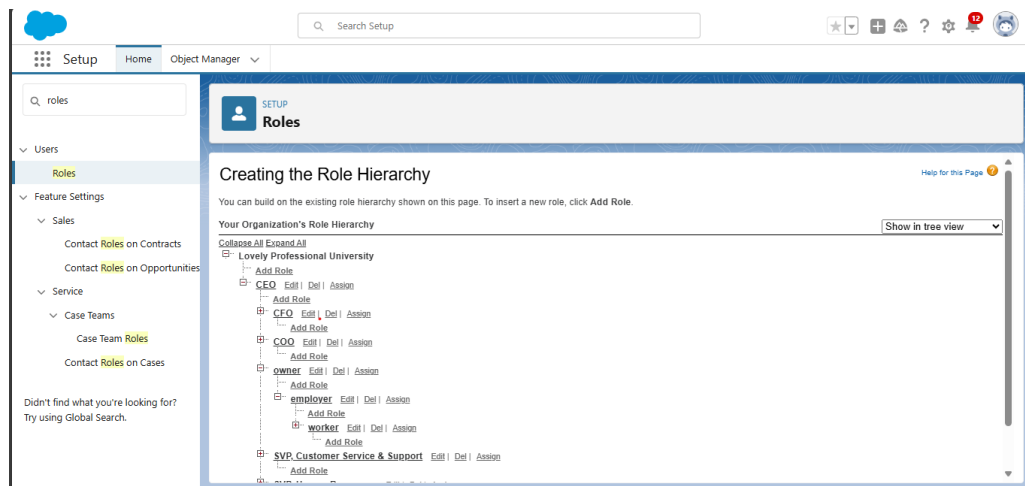
Milestone 9 : Users

Activity 1: Create User

1. **Navigated to User Setup**
   o From the setup page, I typed "Users" in the Quick Find box and selected "Users."
2. **Created a New User**
   o Clicked on "New User."
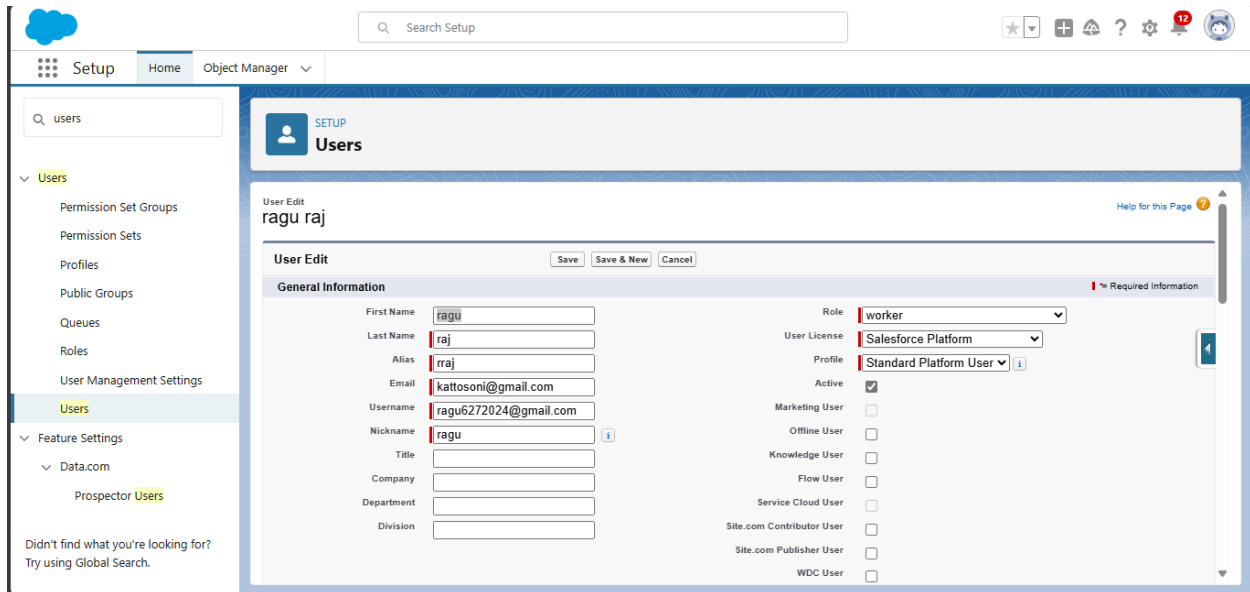3. **Filled in User Details for Vicky**
   o **First Name:** Vicky
   o **Last Name:** Y
   o **Alias:** vy
   o **Email ID:** kattosoni@gmail.com
   o **Username:** vicky6272024@gmail.com
   o **Nick Name:** vicky
   o **Role:** Owner
   o **User License:** Salesforce
   o **Profile:** Owner
   o Clicked "Save."

Activity 2: Creating Another User

1. **Navigated to User Setup**
   - o From the setup page, I typed "Users" in the Quick Find box and selected "Users."
2. **Created a New User**
   - o Clicked on "New User."
3. **Filled in User Details for Ram**
   - o **First Name:** Ram
   - o **Last Name:** Ram
   - o **Alias:** rram
   - o **Email ID:** kattosoni@gmail.com
   - o **Username:** ram6272024@gmail.com
   - o **Nick Name:** ram
   - o **Role:** Employer
   - o **User License:** Salesforce Platform
   - o **Profile:** Standard Platform User
   - o Clicked "Save."

1. **Navigated to User Setup**
   o From the setup page, I typed "Users" in the Quick Find box and selected "Users."
2. **Created a New User**
   o Clicked on "New User."
3. **Filled in User Details for Ragu**
   o **First Name:** Ragu
   o **Last Name:** Raj
   o **Alias:** rraj
   o **Email ID:** kattosoni@gmail.com
   o **Username:** ragu6272024@gmail.com
   o **Nick Name:** ragu
   o **Role:** Worker
   o **User License:** Salesforce Platform
   o **Profile:** Standard Platform User
   o Clicked "Save."

Milestone 10 : Permission sets
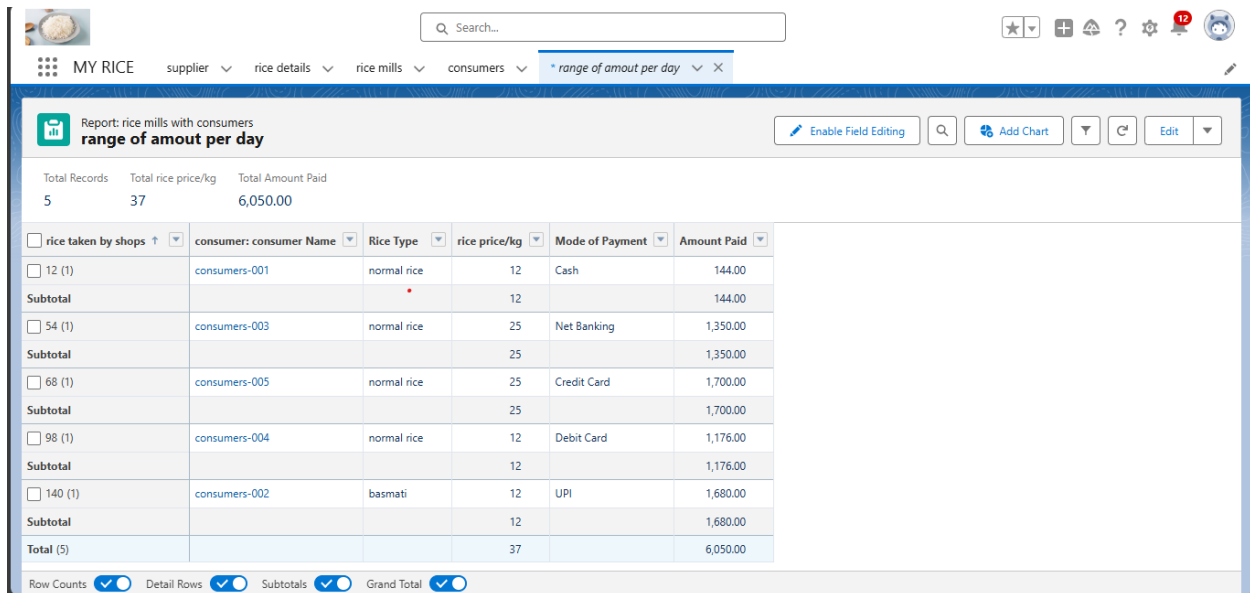
Activity 1: Creating OWD Settings
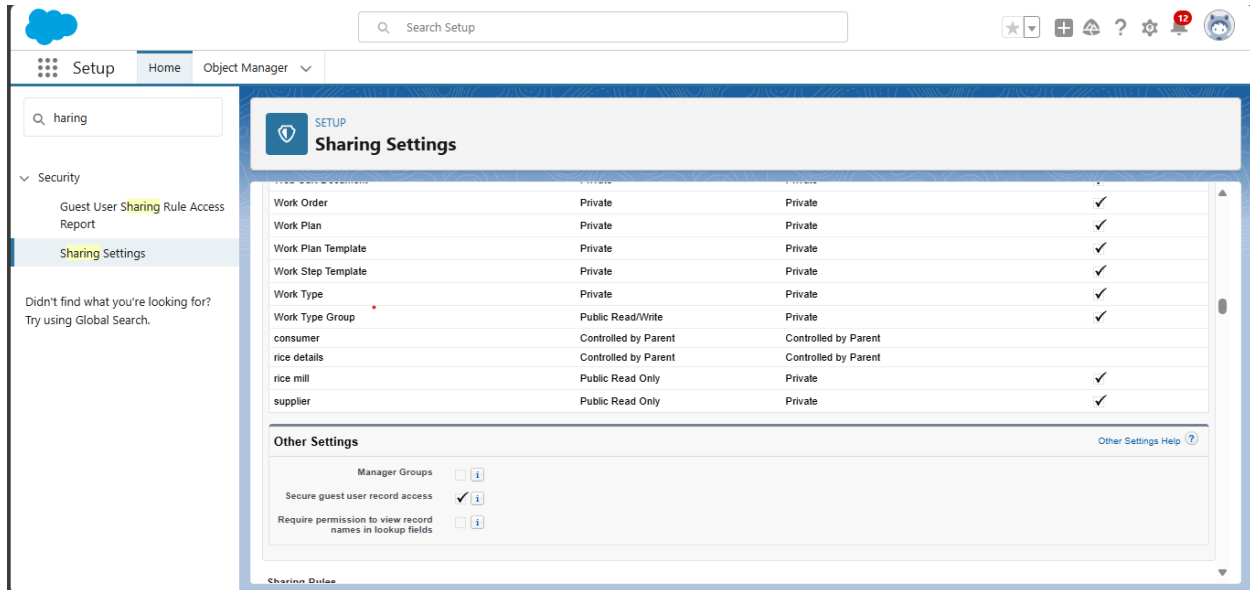
1. **Navigated to Sharing Settings**
   - From the setup page, I typed "Sharing Settings" in the Quick Find box and selected it.
2. **Edited Sharing Settings**
   - Clicked on "Edit" to modify the settings.
3. **Configured Default Internal Access**
   - Scrolled down to the section for Default Internal Access.
   - Changed the default internal access to "Public Read-Only" for the following objects:
     - Rice Mill
     - Supplier
4. **Saved the Changes**
   - Clicked "Save" to apply the new sharing settings.

Milestone 11 : Reports

Activity 1: Create Report

1. **Navigated to Reports**
   - Accessed the Salesforce app and clicked on the Reports tab.
2. **Started a New Report**
   - Clicked on "New Report."
3. **Selected Report Type**
   - Searched for "Rice Mill with Consumers" and selected it as the report type.
   - Clicked on "Start Report."
4. **Configured Report Columns**
   - In the outline pane (if not already opened), selected the following fields in the Columns section:
     1. Consumer Name
     2. Rice Type
     3. Rice Price/kg
     4. Mode of Payments
     5. Amount Paid
5. **Removed Unnecessary Fields**
   - Removed any unnecessary fields from the report layout.
6. **Grouped Rows**
   - Selected "Rice Taken by Shops" in the GROUP ROWS section.
7. **Saved and Ran the Report**
   - Clicked "Save & Run."
   - Named the report as "Range of Amount Per Day."
   - Clicked "Save."

Activity 2: Sharing Report to Owner
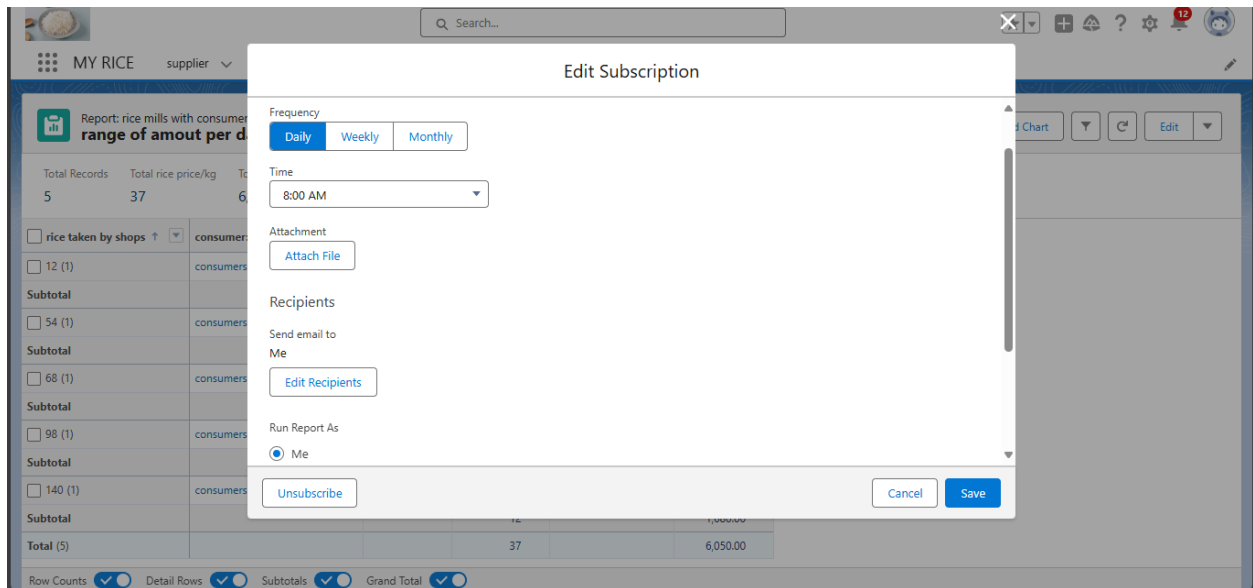
1. **Editing and Subscribing to Report**
   o Clicked on the report's dropdown menu (edit dropdown).
   o Selected the "Subscribe" option.
2. **Subscription Settings**
   o Configured subscription settings as per the provided instructions.
3. **Saved the Subscription**
   o Clicked "Save" to save the subscription settings.

Activity 3: Create a Report Folder
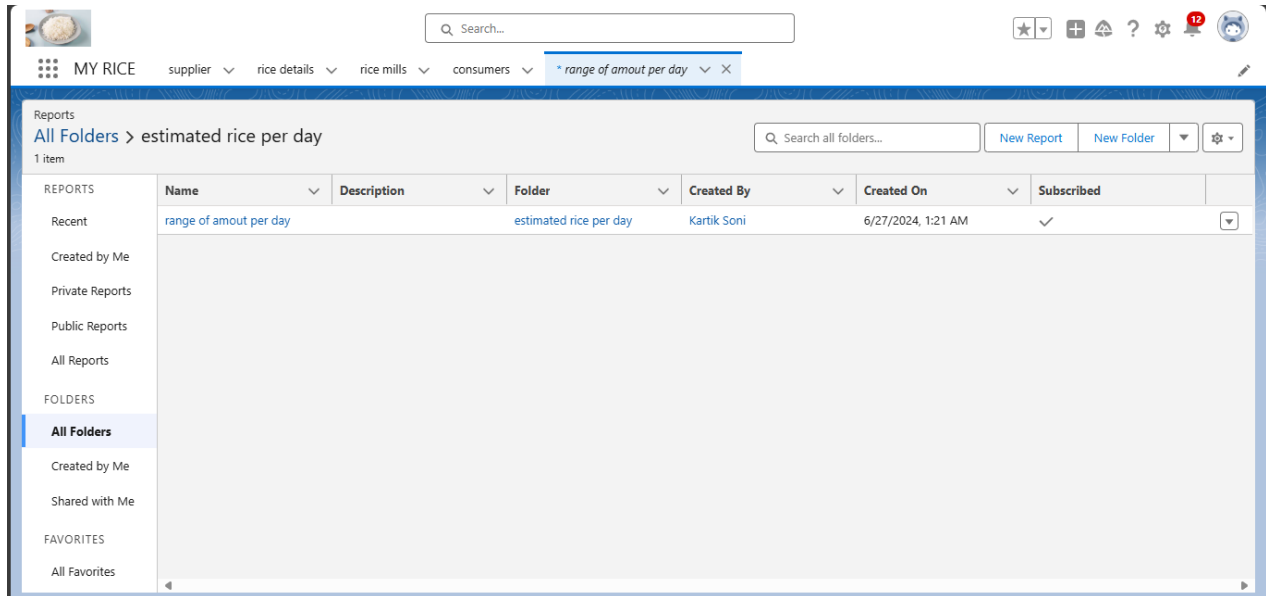
1. **Navigated to Report Folders**
   - Clicked on the App Launcher and searched for "Reports."
2. **Opened Reports Tab**
   - Double-clicked on the "Reports" tab, which auto-populated in the navigation bar.
3. **Created a New Folder**
   - Clicked on "New Folder."
4. **Configured Folder Details**
   - Gave the Folder Label as "Estimated Rice Per Day."
   - The Folder Unique Name was auto-populated.
5. **Saved the Folder**
   - Clicked "Save" to create and save the new report folder.

Milestone 12 : Dashboards

Activity 1: Create Dashboard Folder
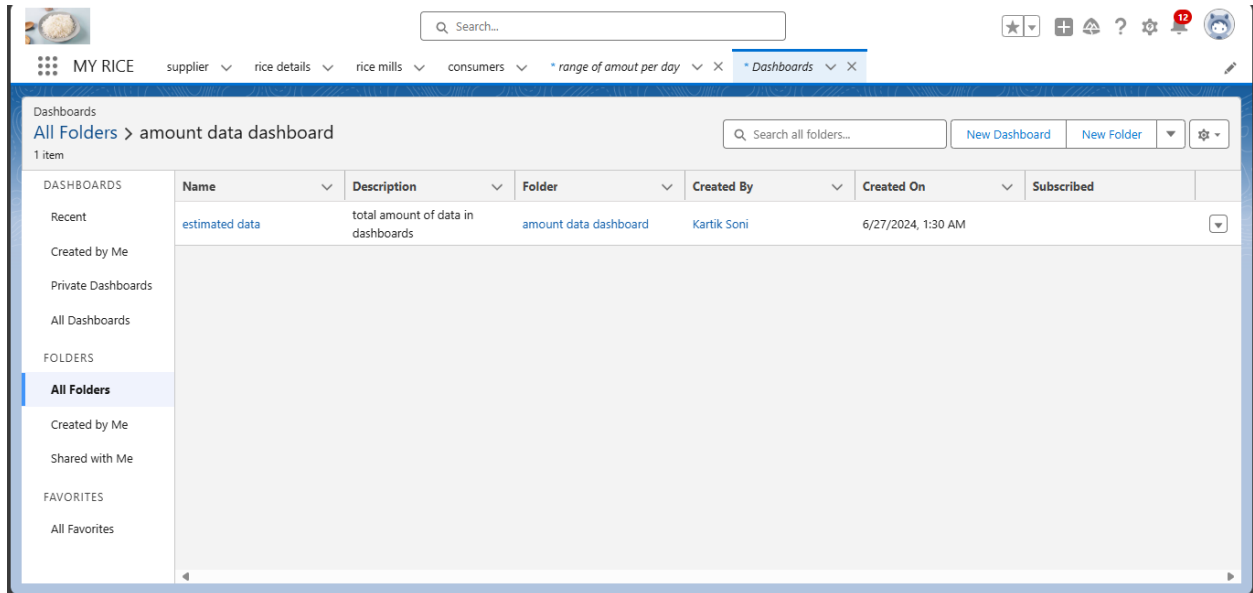
1. **Navigated to Dashboard**
   - o Clicked on the App Launcher and searched for "Dashboard."
2. **Opened Dashboard Tab**
   - o Clicked on the Dashboard tab.
3. **Created a New Folder**
   - o Clicked on "New Folder" within the Dashboard interface.
4. **Configured Folder Details**
   - o Gave the Folder Label as "Amount Data Dashboard."
   - o The Folder Unique Name was auto-populated.
5. **Saved the Folder**
   - o Clicked "Save" to create and save the new dashboard folder.

Activity 2: Create Dashboard

1. **Navigated to Dashboards**
   - o Accessed the Salesforce app and clicked on the Dashboards tab.
2. **Started Creating a New Dashboard**
   - o Entered a Name for the dashboard.
   - o Selected the previously created folder ("Amount Data Dashboard").
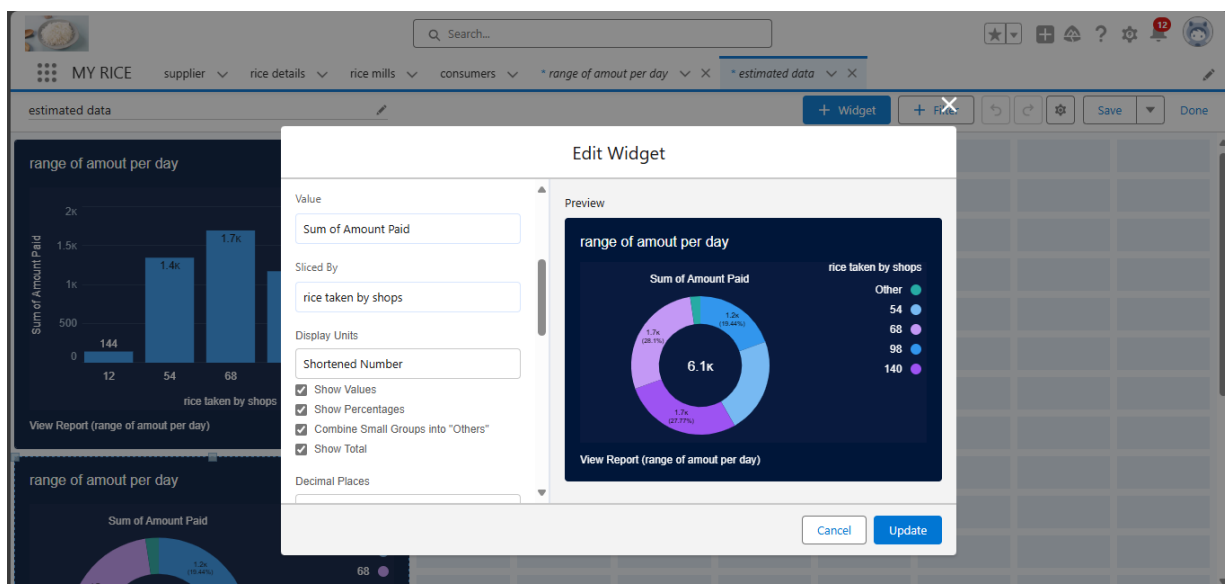   - o Clicked on "Create."

3. **Adding Components to the Dashboard**
    o   **First Component (Vertical Bar Chart):**
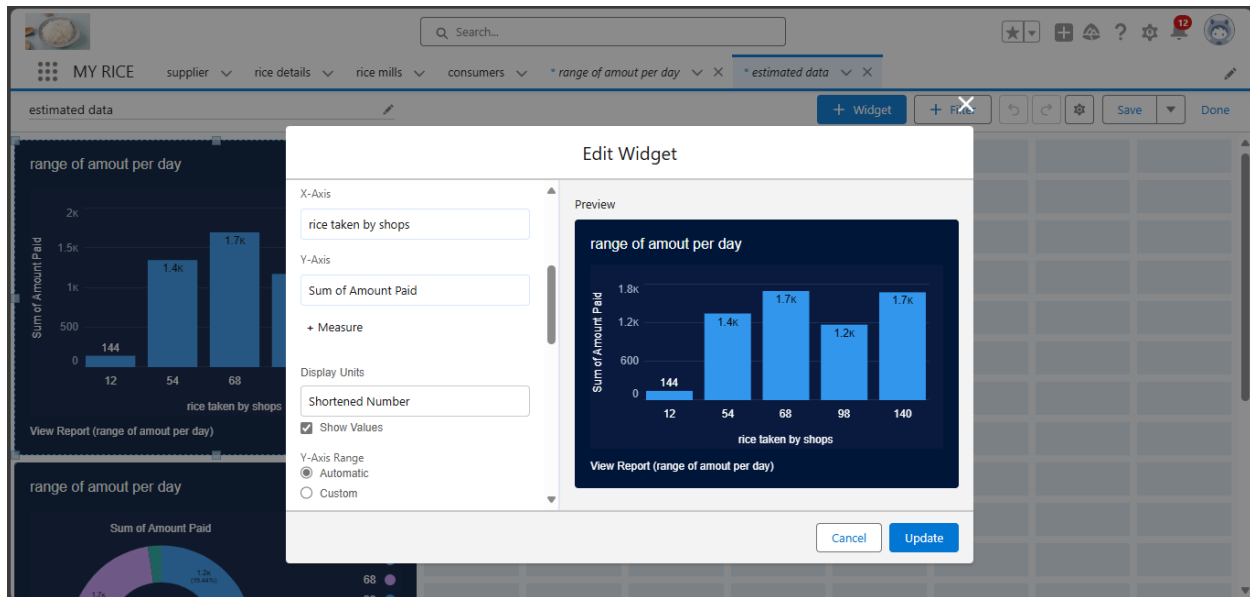
- Selected "Add Component."
- Chose a Report and clicked on "Select."
- Configured the component settings:
  - Display as: Vertical Bar Chart
  - X-axis: Rice Taken by Shops
  - Y-axis: Sum of Amount
  - Y-axis Range: Automatic
  - Sort by: Rice Taken by Shops
  - Component Theme: Dark
    o   **Second Component (Donut Chart):**

- Selected "Add Component."
- Chose a Report and clicked on "Select."
- Configured the component settings:
  - Display as: Donut Chart
  - Sort by: Sum of Amount
  - Title: Range of Amount Per Day
  - Component Theme: Dark

4. **Added the Components**
   o Completed adding both components to the dashboard layout.