

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.

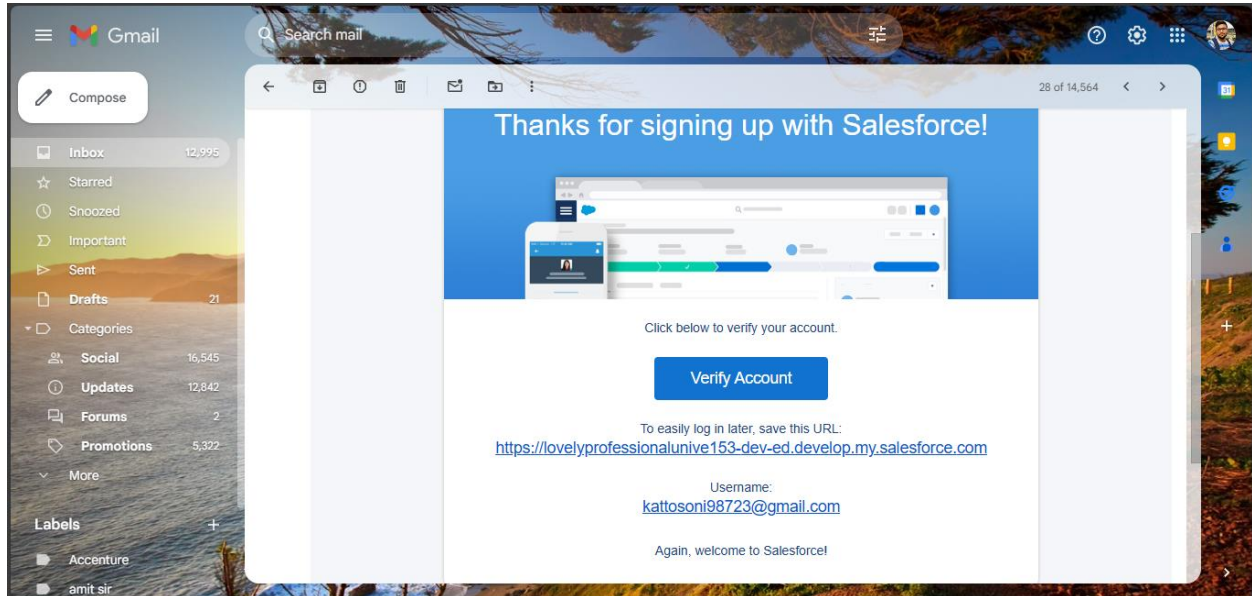
The screenshot displays the Salesforce Developer 'Personal Information' setup page. The interface includes a top navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. A sidebar on the left lists various setup options under 'My Personal Information', with 'Personal Information' currently selected. The main content area contains a form with the following fields and values:

Field	Value
First Name	Kartik
Last Name	Soni
Alias	KSoni
Email	kattosoni@gmail.com
Username	kattosoni98723@gmail.com
Nickname	User1719224743997765274
Phone	
Extension	
Fax	
Mobile	5035550123
Address (Street)	
Address (City)	
Address (State/Province)	

Activity 2: Account Activation:

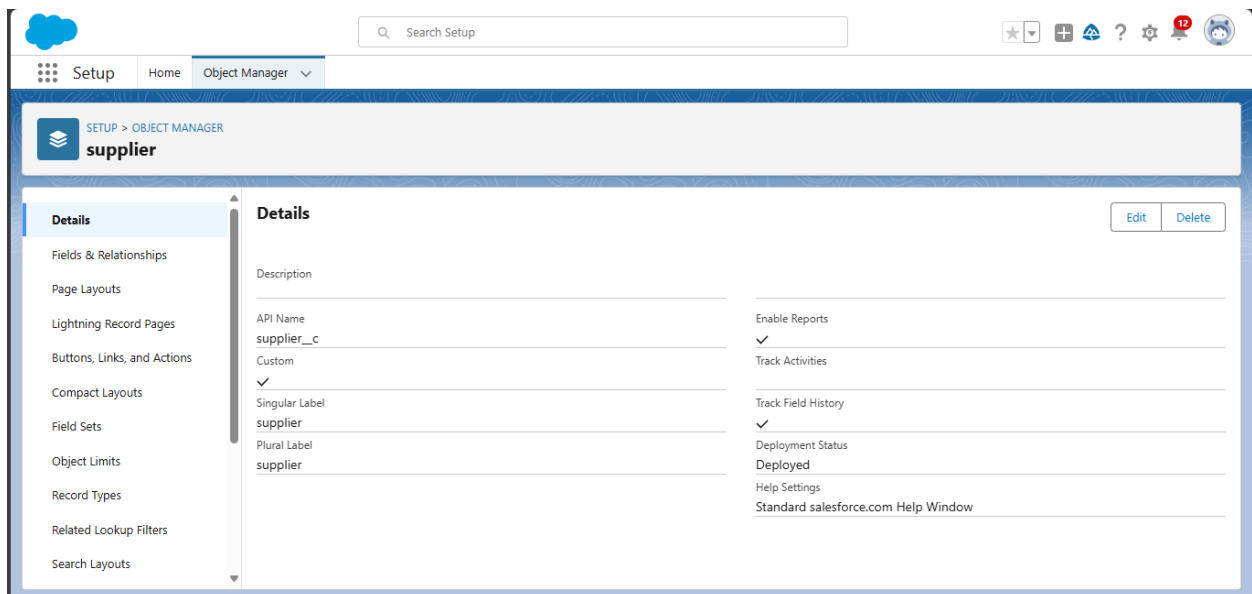
Checked for Confirmation Email

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

- **Label Name:** Supplier
- **Plural Label Name:** Suppliers
- **Record Name:** Supplier Name
- **Data Type:** Text

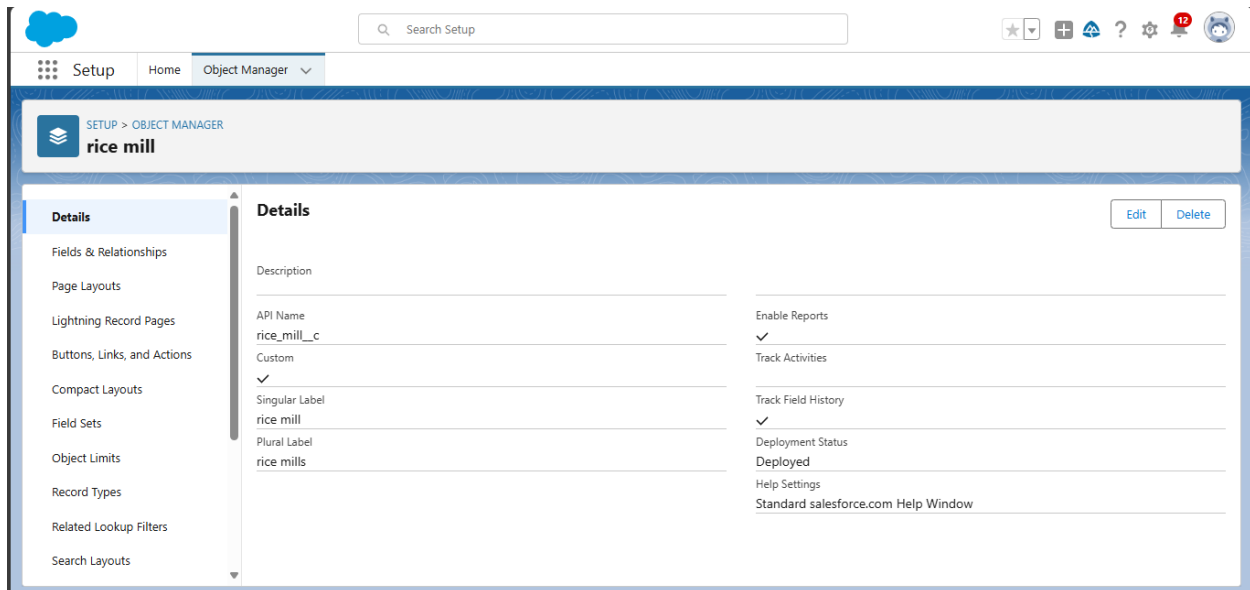
4. Configured Object Settings

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

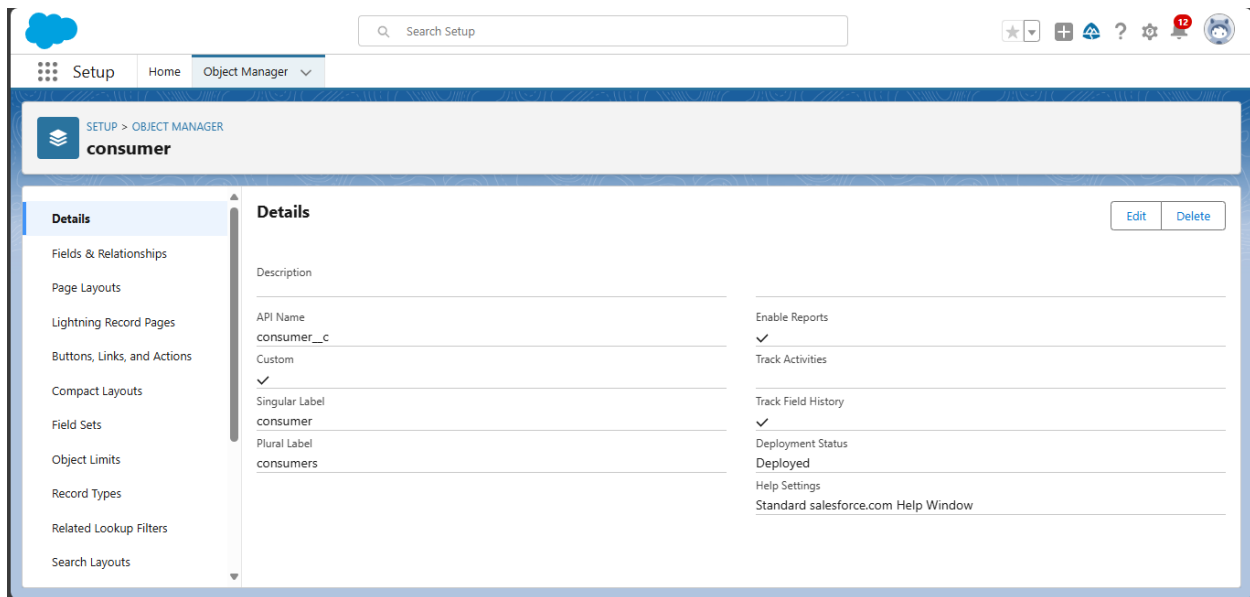
I clicked on "Create" and then selected "Custom Object."

3. Entered Object Details

- **Label Name:** Rice Mill

- **Plural Label Name:** Rice Mills
 - **Record Name:** Rice Mill Number
 - **Data Type:** Auto Number
 - **Display Format:** rice-{000}
 - **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.

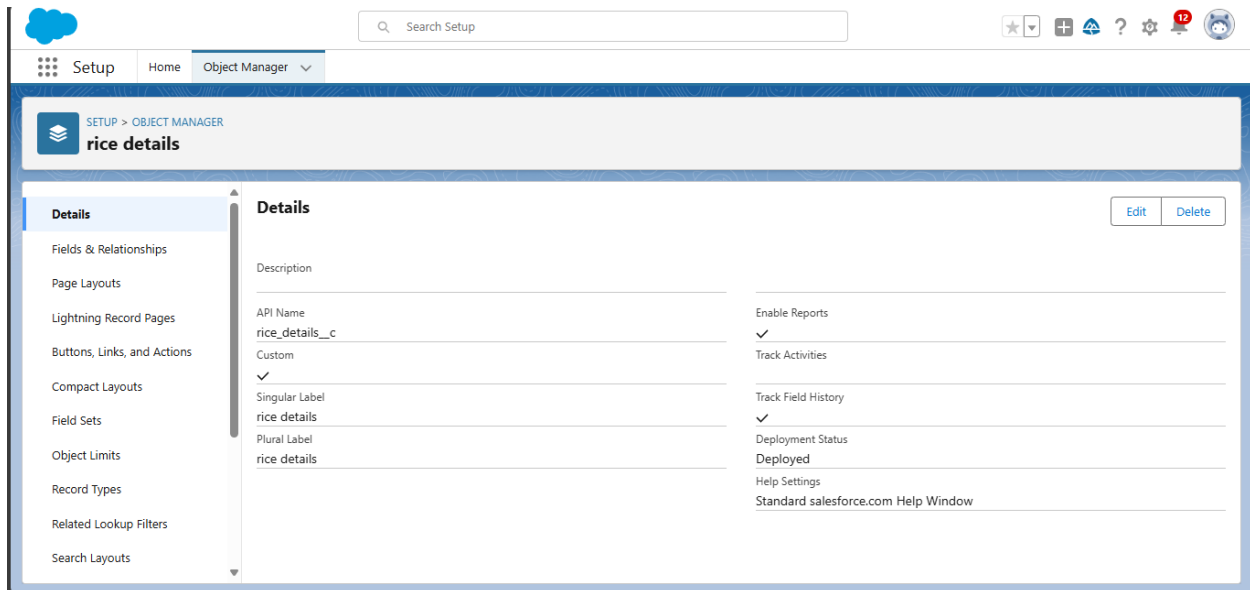
Activity 3: Create Consumer Object



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**
 - **Label Name:** Consumer
 - **Plural Label Name:** Consumers
 - **Record Name:** Consumer Number
 - **Data Type:** Auto Number
 - **Display Format:** consumers-{000}

- **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**
 - **Label Name:** Rice Details
 - **Plural Label Name:** Rice Details
 - **Record Name:** Rice Detail Number
 - **Data Type:** Auto Number
 - **Display Format:** rice-{000}
 - **Starting Number:** 1
3. **Configured Object Settings**
I selected "Allow Reports" and "Track Field History" options, and enabled "Allow Search."

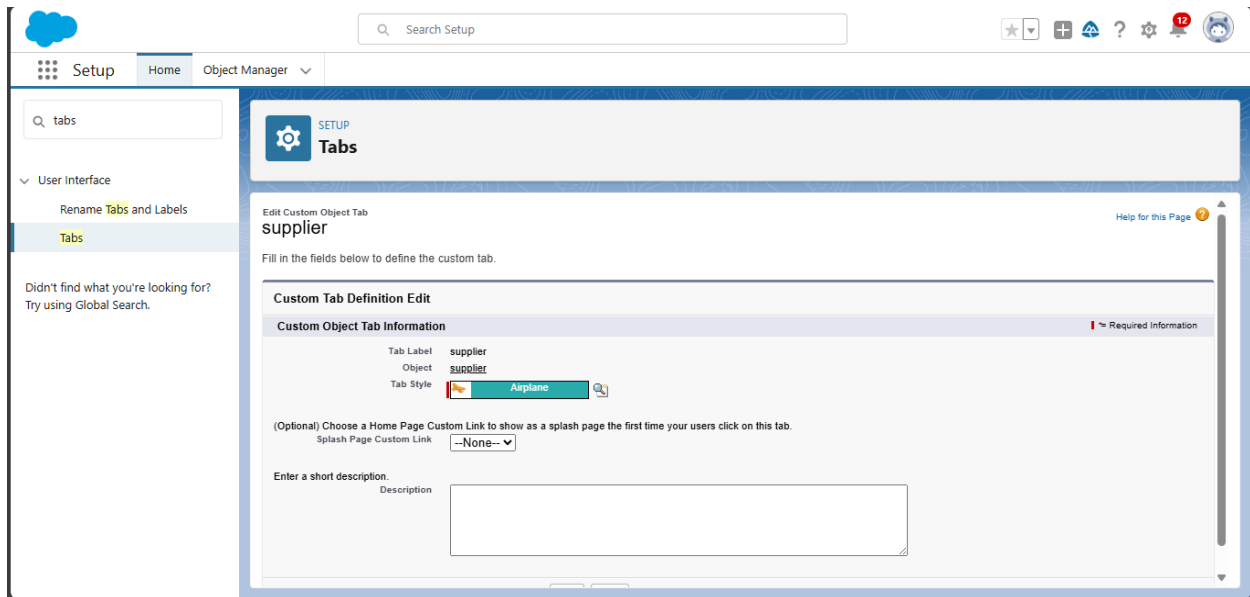
4. Saved the Object

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.

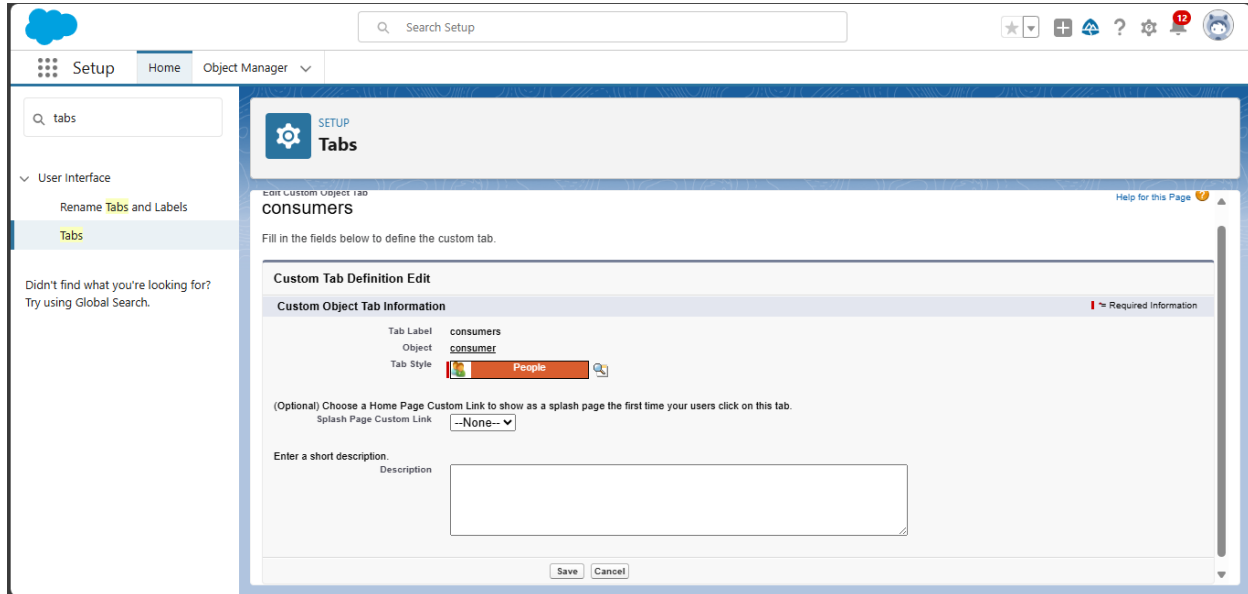
4. Finalized Tab Settings

Ensured that the "Append tab to users' existing personal customizations" option was checked.

5. Saved the Tab

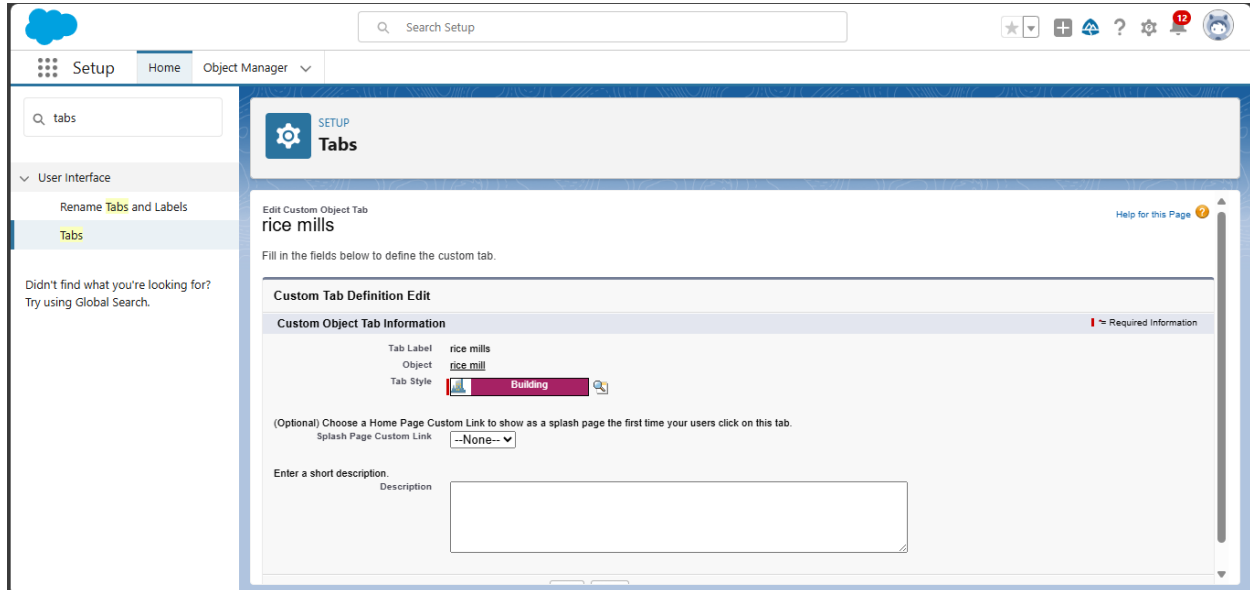
I clicked on the "Save" button to create the Supplier tab.

Creating a Tab for Consumer



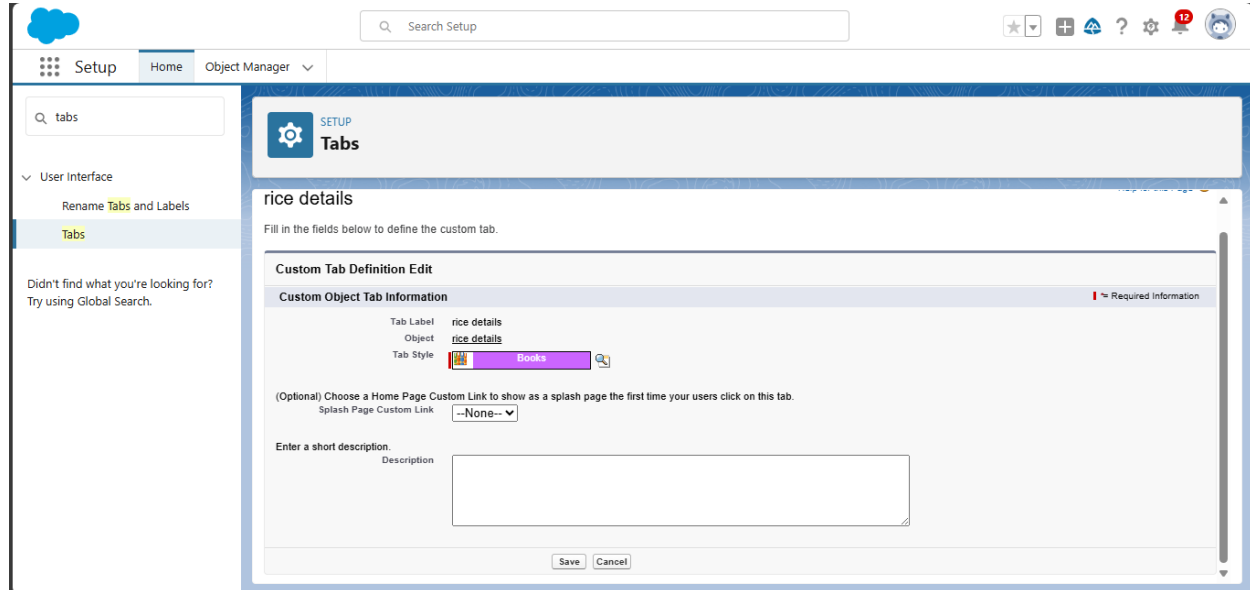
- 1. Navigated to Tabs Setup**
From the setup page, I typed "Tabs" in the Quick Find bar and clicked on "Tabs."
- 2. Created a New Custom Object Tab**
I clicked on "New" under the Custom Object Tabs section.
- 3. Selected Object and Tab Style**
 - **Selected Object:** Consumer
 - **Selected Tab Style:** people
 - 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 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**
 - **Selected Object:** Rice Mill
 - **Selected Tab Style:** Building
 - 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 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

- **Selected Object:** Rice Details
- **Selected Tab Style:** Books
- 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 Rice Details tab.

Milestone 4- The Lightning App

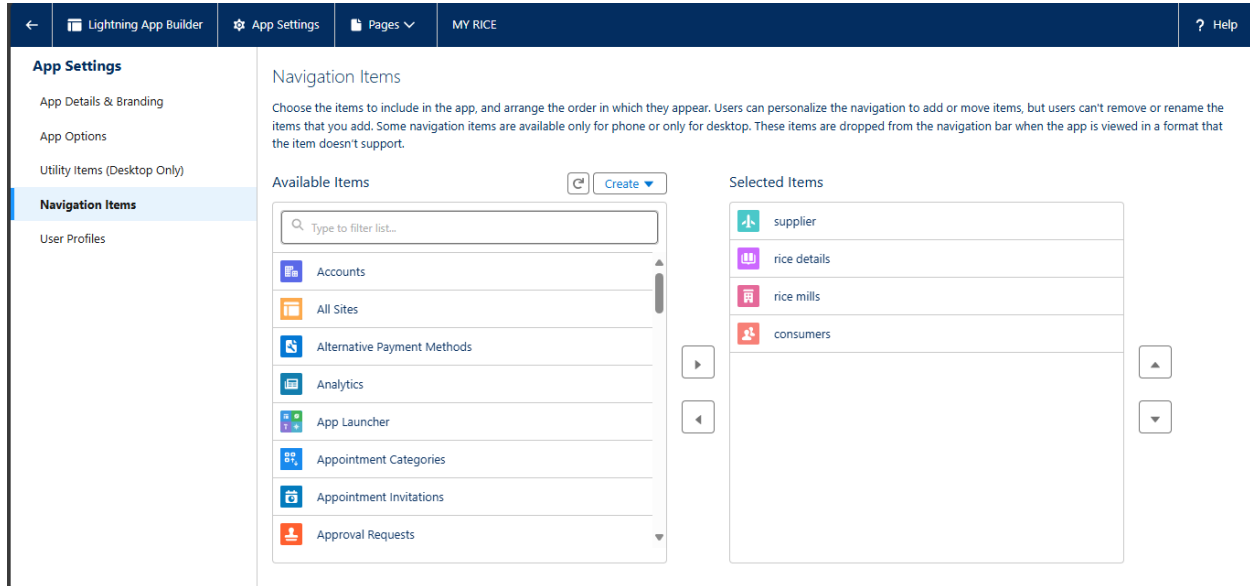
Activity 1: Create a Lightning App

Creating a Lightning App Page

The screenshot displays the 'App Settings' interface in the Lightning App Builder. The left sidebar lists 'App Settings' with a sub-item 'App Details & Branding' highlighted. The main content area is titled 'App Details & Branding' and includes the instruction: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' The 'App Details' section contains three input fields: 'App Name' (filled with 'MY RICE'), 'Developer Name' (filled with 'MY_RICE'), and 'Description' (placeholder text 'Enter a description...'). The 'App Branding' section features an 'Image' upload area with a photo of a bowl of rice, a 'Primary Color Hex Value' field set to '#0070D2', and an 'Org Theme Options' checkbox labeled 'Use the app's image and color instead of the org's custom theme'. At the bottom, an 'App Launcher Preview' shows a small icon of the bowl of rice next to the text 'MY RICE'.

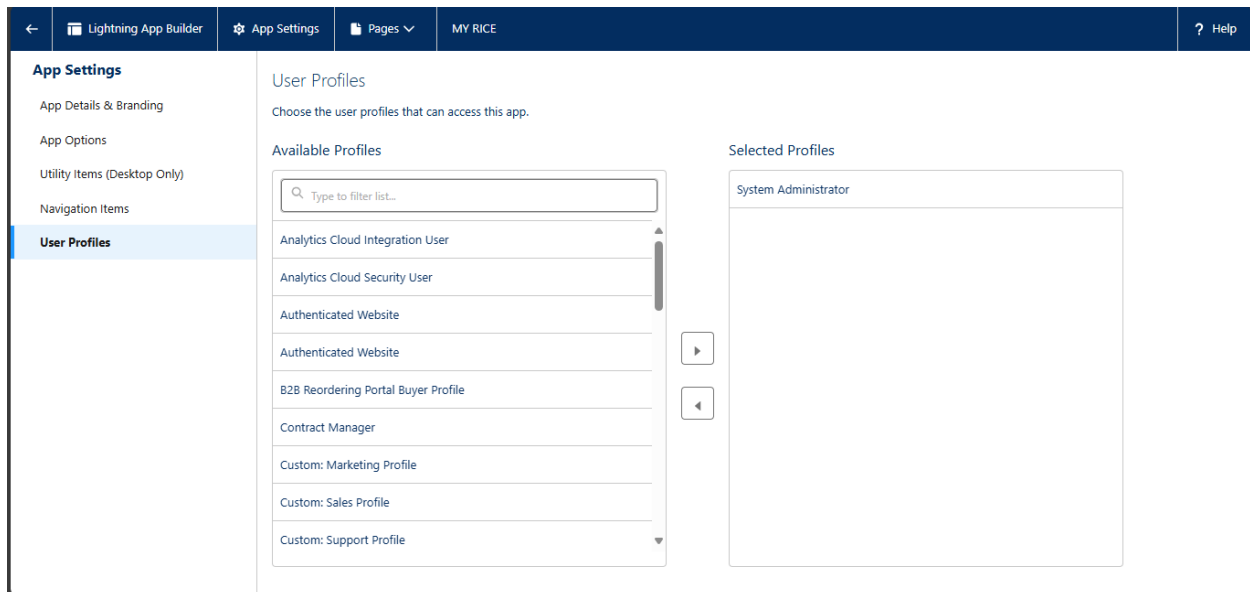
- 1. Navigated to App Manager**
From the setup page, I searched for "App Manager" in the Quick Find bar and selected "App Manager."
- 2. Created a New Lightning App**
I clicked on "New Lightning App."
- 3. Filled Out App Details**
 - **App Name:** MY RICE
 - Clicked "Next."
- 4. Configured App Options**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

- Clicked "Next."

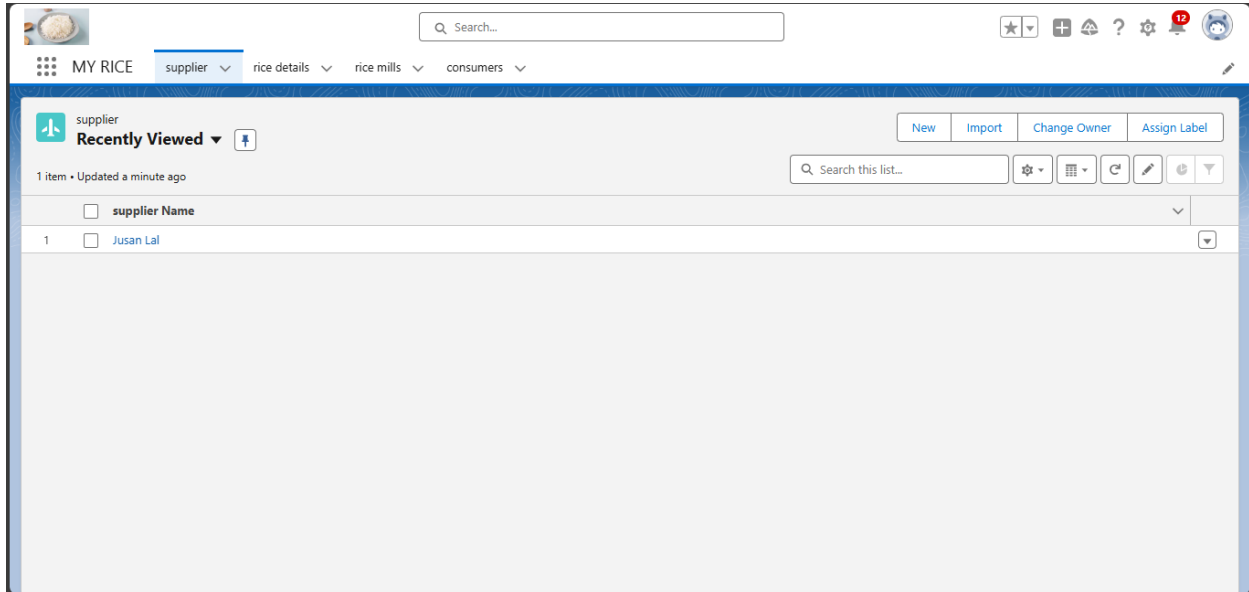


8. Added User Profiles

- I searched for "System Administrator" in the search bar.
- Clicked on the arrow button to add the profile.
- Clicked "Save & Finish."

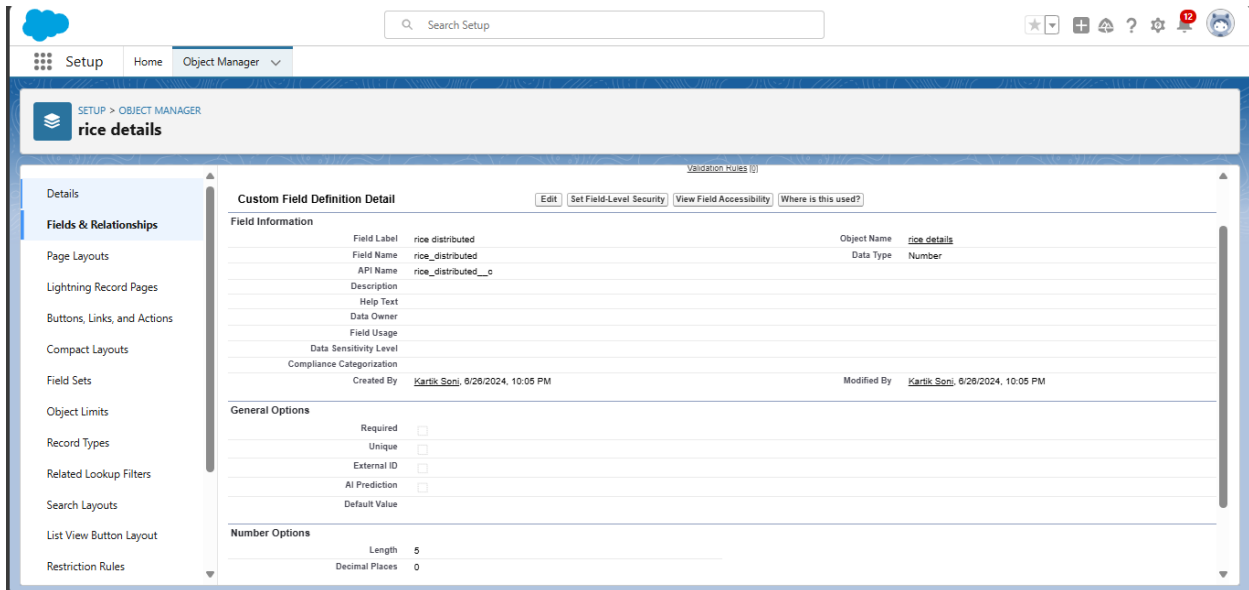


Final Output of MY RICE app (Screenshot)



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

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like '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', and 'Restriction Rules'. The main content area is titled 'supplier Name' and 'Back to rice details'. It shows the 'Custom Field Definition Detail' for the 'supplier Name' field. The 'Field Information' section includes fields like 'Field Label', 'Field Name', 'API Name', 'Description', 'Help Text', 'Data Owner', 'Field Usage', 'Data Sensitivity Level', and 'Compliance Categorization'. The 'Master-Detail Options' section shows the 'Related To' object as 'supplier' and the 'Child Relationship Name' as 'rice_details'. The 'Lookup Filter' section indicates 'No lookup filters defined'.

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

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area displays the 'rice details Custom Field' configuration for a Master-Detail relationship. The 'Field Information' section shows the field label 'rice mill 1(one)', field name 'rice_mill_1_one', and API name 'rice_mill_1_one__c'. The 'Master-Detail Options' section shows the related object 'rice_mill' and the child relationship name 'rice_details'. The 'Sharing Setting' is set to 'Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.'.

rice details Custom Field
rice mill 1(one)
[Back to rice details](#)

[Validation Rules \(0\)](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	rice mill 1(one)	Object Name	rice_details
Field Name	rice_mill_1_one	Data Type	Master-Detail
API Name	rice_mill_1_one__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Kartik Soni, 6/26/2024, 10:08 PM	Modified By	Kartik Soni, 6/26/2024, 10:08 PM

Master-Detail Options

Related To	rice_mill	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	<input type="checkbox"/>		

Lookup Filter

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

- **Field Label:** Rice Mill 1 (One)
- Clicked "Next," "Next," and then "Save."

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

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' dropdown is selected, showing 'consumer' as the active object. The left sidebar contains a list of setup options: Details, Fields & Relationships (selected), 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, and Restriction Rules. The main content area displays the 'rice mill name' custom field definition for the 'consumer' object. The field is of type 'Master-Detail'. The 'Field Information' section shows the field label 'rice mill name', field name 'rice_mill_name', API name 'rice_mill_name__c', and other metadata. The 'Master-Detail Options' section shows the related object 'rice_mill' and the child relationship name 'consumers'. The 'Read/Write' checkbox is checked, indicating that users with at least Read/Write access to the Master record can create, edit, or delete related Detail records.

consumer Custom Field
rice mill name
[Back to consumer](#)

[Validation Rules \(0\)](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	rice mill name	Object Name	consumer
Field Name	rice_mill_name	Data Type	Master-Detail
API Name	rice_mill_name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Kartik Soni, 6/26/2024, 10:09 PM	Modified By	Kartik Soni, 6/26/2024, 10:09 PM

Master-Detail Options

Related To	rice_mill	Child Relationship Name	consumers
Related List Label	consumers		
Sharing Setting			
Reparentable Master Detail	<input type="checkbox"/>		

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

Lookup Filter

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

- **Field Label:** Rice Mill Name
- Clicked "Next," "Next," and then "Save."

Activity 4: Creating the Roll-Up Summary Field

Creating Roll-Up Summary on Supplier Object

The screenshot shows the Salesforce Setup interface for a custom field on the Supplier object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), 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, and Restriction Rules. The main content area is titled 'supplier Custom Field' and 'sum of rice distributed'. It includes a 'Back to supplier' link and a 'Help for this Page' icon. Below this is the 'Custom Field Definition Detail' section with tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table lists details for the field 'sum of rice distributed', including its API name 'sum_of_rice_distributed__c' and creation/modification dates. The 'Roll-Up Summary Options' table shows the field is configured as a 'Roll-Up Summary' with a 'SUM' type, summarizing 'rice details' and aggregating 'rice distributed'.

Field Information		Object Name
Field Label	sum of rice distributed	supplier
Field Name	sum_of_rice_distributed	
API Name	sum_of_rice_distributed__c	
Description		
Help Text		
Data Owner		
Field Usage		
Data Sensitivity Level		
Compliance Categorization		
Created By	Kartik Soni	Modified By: Kartik Soni
	6/26/2024, 10:11 PM	6/26/2024, 10:11 PM

Roll-Up Summary Options		
Data Type	Roll-Up Summary	Summary Type
Summarized Object	rice details	SUM
Field to Aggregate	rice details: rice distributed	
Filter Criteria		

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

- **Field Label:** Sum of Rice Distributed
- The Field Name was auto-generated.
- Clicked "Next."

5. Configured Roll-Up Summary

- **Summarized Object:** Rice Details
- **Roll-Up Type:** Sum
- **Field to Aggregate:** Rice Distributed
- Clicked "Next," "Next," and then "Save."

Creating Roll-Up Summary on Rice Mill Object

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled 'rice mill Custom Field' and 'rice distributed to shops'. It includes a 'Back to rice mill' link and a 'Help for this Page' icon. The 'Custom Field Definition Detail' section has tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table shows the following details:

Field Label	Field Name	API Name	Description	Help Text	Data Owner	Field Usage	Data Sensitivity Level	Compliance Categorization	Created By	Modified By
rice distributed to shops	rice_distributed_to_shops	rice_distributed_to_shops__c							Karish Soni	6/26/2024, 10:22 PM

The 'Roll-Up Summary Options' section shows the following configuration:

Data Type	Summarized Object	Field to Aggregate	Filter Criteria	Roll-Up Summary	Summary Type
	rice details	rice details.rice distributed			SUM

6. Repeated Steps for Rice Mill Object

I followed the same steps from 1 to 3.

7. Entered Field Details

- **Field Label:** Rice Distributed to Shops
- The Field Name was auto-generated.
- Clicked "Next."

8. Configured Roll-Up Summary

- **Summarized Object:** Rice Details
- **Roll-Up Type:** Sum
- **Field to Aggregate:** Rice Distributed
- Clicked "Next," "Next," and then "Save."

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

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

Creating Roll-Up Summary on Rice Mill Object

The screenshot displays the Salesforce Setup interface for configuring a custom field on the 'rice mill' object. The breadcrumb trail is 'SETUP > OBJECT MANAGER > rice mill'. The left sidebar shows the 'Fields & Relationships' section is active. The main content area is titled 'rice mill Custom Field' and 'rice taken'. It includes a 'Back to rice mill' link and a 'Help for this Page' icon. The 'Custom Field Definition Detail' section has tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table lists details for the 'rice taken' field, including its label, name, API name, description, help text, data owner, field usage, data sensitivity level, compliance categorization, creation date, and modified date. The 'Roll-Up Summary Options' section shows the configuration for a roll-up summary, including the data type, summarized object, field to aggregate, filter criteria, and summary type.

Field Information	
Field Label	rice taken
Field Name	rice_taken
API Name	rice_taken__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Kartik Soni, 6/26/2024, 10:23 PM
Modified By	Kartik Soni, 6/26/2024, 10:42 PM

Roll-Up Summary Options	
Data Type	Roll-Up Summary
Summarized Object	consumer
Field to Aggregate	consumer.rice_taken_by_shops
Filter Criteria	
Summary Type	SUM

9. Repeated Steps for Rice Mill Object

I followed the same steps from 1 to 3.

10. Entered Field Details

- **Field Label:** Rice Taken
- The Field Name was auto-generated.
- Clicked "Next."

11. Configured Roll-Up Summary

- **Summarized Object:** Consumer
- **Roll-Up Type:** Sum
- **Field to Aggregate:** Rice Taken in Shops
- Clicked "Next," "Next," and then "Save."

Activity 5: Creating Fields in Rice Details Object

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' dropdown is open, showing 'rice_details' selected. The left sidebar contains a list of setup categories: Details, Fields & Relationships (selected), 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, and Restriction Rules. The main content area is titled 'Custom Field Definition Detail' and includes tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays the following details: Field Label (supplier name), Field Name (supplier_name), API Name (supplier_name__c), Object Name (rice_details), Data Type (Number), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'Created By' and 'Modified By' fields both show 'Kartik Soti' with a timestamp of '6/26/2024, 10:28 PM'. The 'General Options' section includes checkboxes for 'Required', 'Unique', 'External ID', and 'AI Prediction', all of which are currently unchecked. The 'Number Options' section shows 'Length' set to 5 and 'Decimal Places' set to 0.

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

The screenshot shows the Salesforce Setup interface for the 'rice mill' object. The 'Fields & Relationships' tab is selected in the left sidebar. The main content area displays the 'Custom Field Definition Detail' for a new field named 'rice_price/kg'. The field is of type 'Number' and has a length of 5. The 'Field Information' section shows the field label, name, API name, and other details. The 'General Options' section includes checkboxes for 'Required', 'Unique', 'External ID', 'AI Prediction', and 'Default Value'. The 'Number Options' section shows the 'Length' as 5. The 'Created By' and 'Modified By' fields are both set to 'Kartik Soni' on 6/26/2024 at 10:32 PM.

Field Information		Object Name	Data Type
Field Label	rice price/kg	rice_mill	Number
Field Name	rice_price__kg		
API Name	rice_price__kg__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Kartik Soni	Modified By	Kartik Soni
	6/26/2024, 10:32 PM		6/26/2024, 10:32 PM

General Options	
Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
AI Prediction	<input type="checkbox"/>
Default Value	

Number Options	
Length	5

1. Selected Data Type

I selected "Number" as the data type and clicked "Next."

2. Entered Field Details

- Field Label: Rice Price/Kg
- Length: 5
- Clicked "Next," "Next," and then "Save."

Activity 7: Creating Fields in Consumer Object

The screenshot shows the Salesforce Setup interface for the 'consumer' object. The 'Fields & Relationships' tab is selected in the left sidebar. The main content area displays a list of 13 fields, sorted by Field Label. The fields are listed in a table with columns for Field Label, Field Name, and Data Type. The 'Fields & Relationships' section includes a search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'.

Field Label	Field Name	Data Type
Consumer Name	Consumer_Name__c	Formula (Text)
consumer Name	Name	Auto Number
Created By	CreatedById	Lookup(User)
email	email__c	Email
First Name	First_Name__c	Text(40)
Last Modified By	LastModifiedById	Lookup(User)
Last Name	Last_Name__c	Text(40)
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 Type	Rice_Type__c	Picklist

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

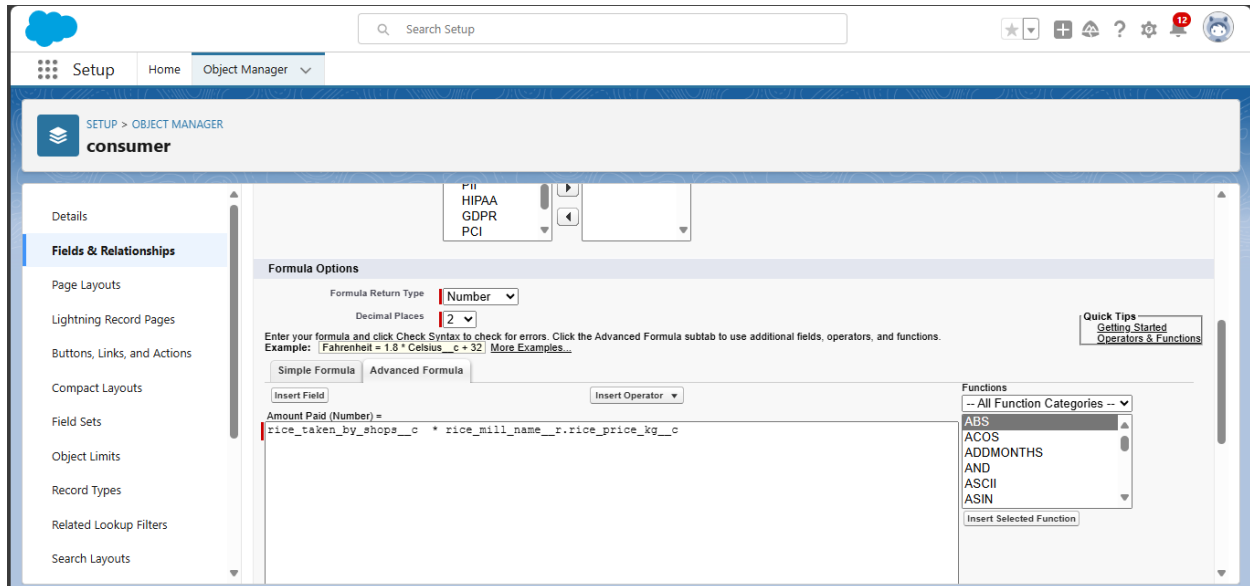
Activity 8: Creating Cross-Object Formula Field in Consumer Object

Creating "Amount Paid" Formula Field

The screenshot shows the Salesforce Setup interface for defining a custom field on the 'consumer' object. The page title is 'Amount Paid'. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area is titled 'Custom Field Definition Edit' and contains the following fields:

- Field Label:** Amount Paid
- Field Name:** Amount_Paid
- Description:** (Empty text box)
- Help Text:** (Empty text box with an information icon)
- Data Owner:** User
- Field Usage:** --None--
- Data Sensitivity Level:** --None--
- Compliance Categorization:** Available (PII, HIPAA, etc.)

Buttons for 'Save', 'Quick Save', and 'Cancel' are located at the top right of the form. A 'Help for this Page' link is also present.



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

- **Field Label:** Amount Paid
- **Field Name:** Amount Paid
- **Formula Return Type:** Number
- Clicked "Next."

5. Inserted Formula

- Formula: `rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c`
- Clicked "Check Syntax" and then "Save."

Creating "Consumer Name" Formula Field

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

Edit consumer Custom Field
Consumer Name

Custom Field Definition Edit

Field Information

Field Label: Consumer Name

Field Name: Consumer__Name

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen: PII, HIPAA

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

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen: PII, HIPAA

Formula Options

Formula Return Type: Text

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

6. Repeated Steps for Consumer Name

I followed the same steps from 1 to 3.

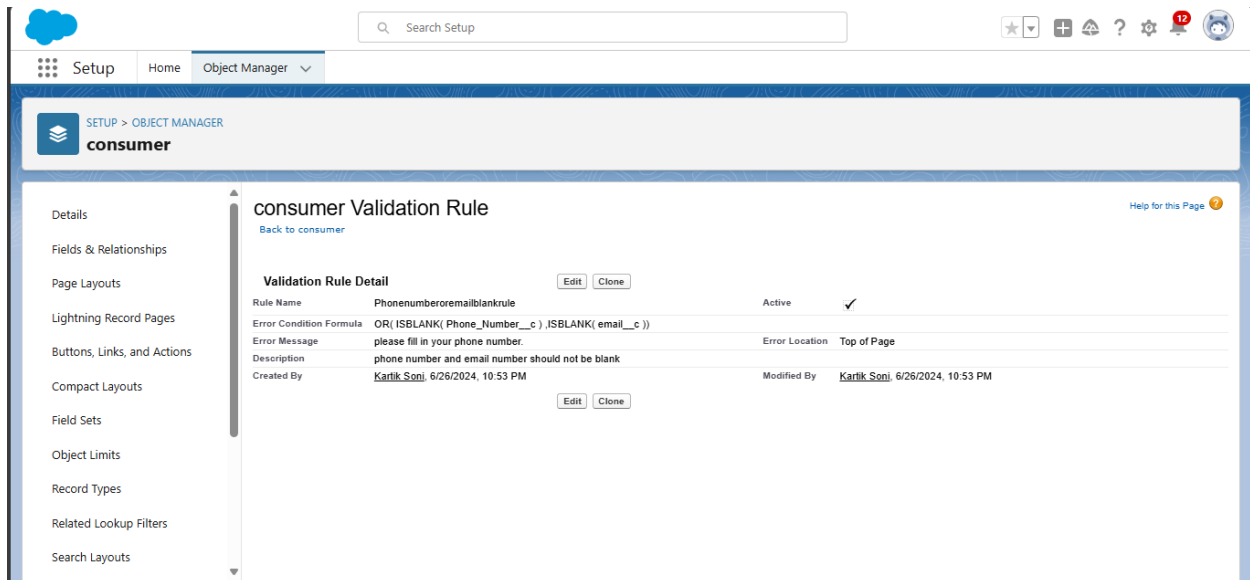
7. Entered Field Details

- Field Label: Consumer Name
- Field Name: Consumer Name
- Formula Return Type: Text
- Clicked "Next."

8. Inserted Formula

- Formula: First_Name__c + ' ' + Last_Name__c
- 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."

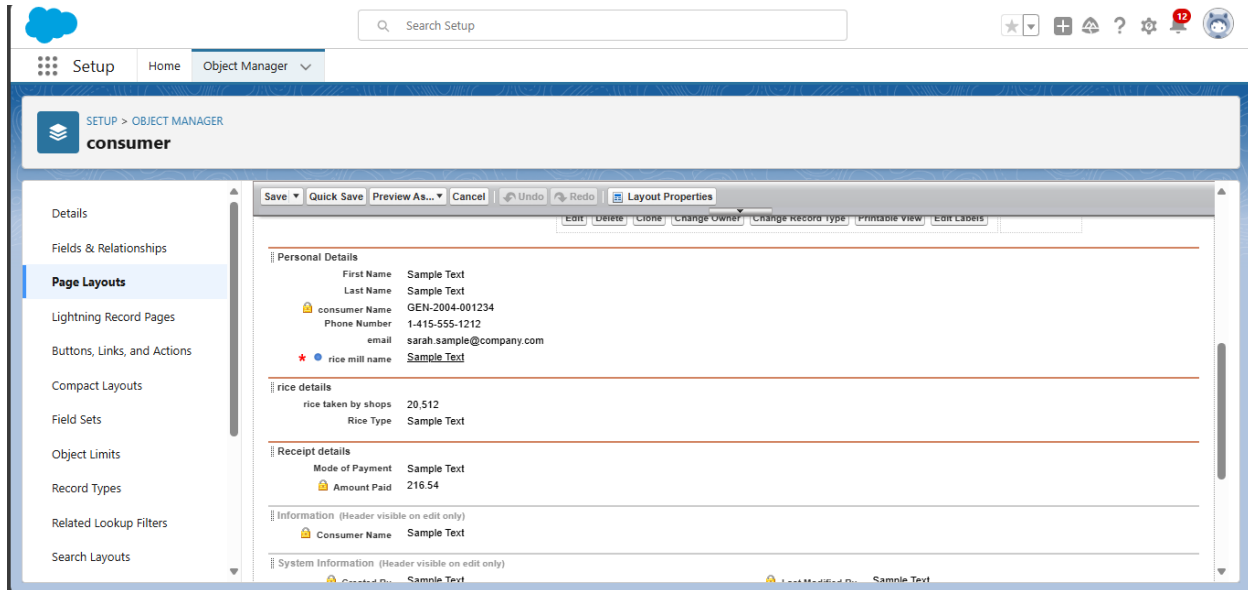
4. Configured Error Message

- **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



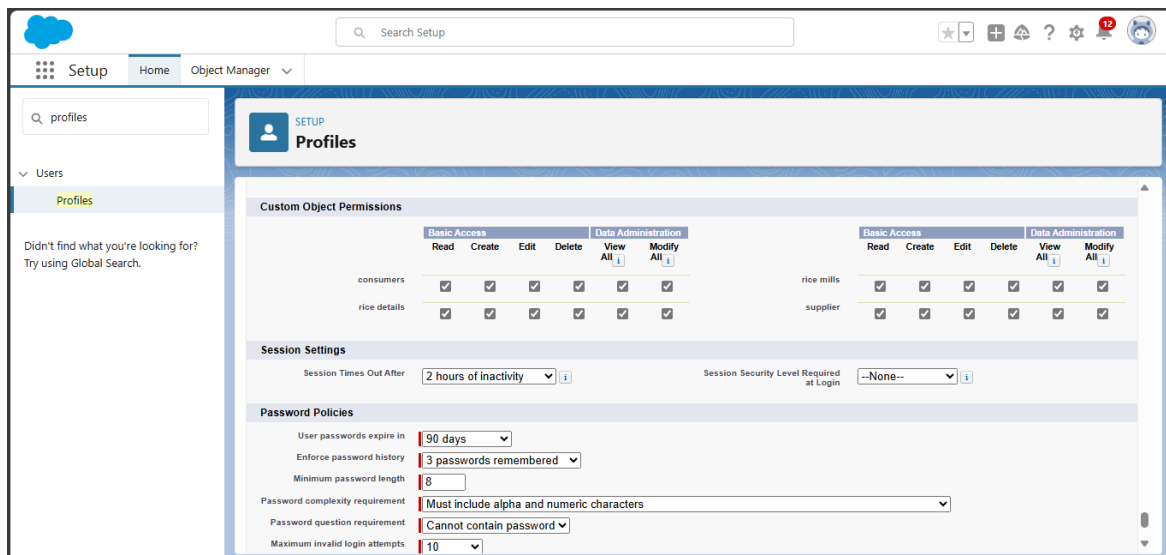
1. **Navigated to the Consumer Object**
 - o From the setup page, I clicked on "Object Manager."
 - o Searched for the "Consumer" object and selected it from the dropdown.
2. **Created a New Page Layout**
 - o Clicked on "Page Layouts."
 - o Clicked on "New."
3. **Configured the Page Layout**
 - o Selected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

- 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**
 - Created a new section named "Receipt Details" and clicked "Ok."
 - Dragged and dropped the following fields into the "Receipt Details" section:
 - Mode of Payment
 - Amount Paid
- 8. **Saved the Page Layout**
 - Clicked "Save" to save the new customer Layout.

Milestone 7 : Profiles

Activity 1: Creating the Owner 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 User Profile**
 - Selected the "Standard User" profile and clicked "Clone."
 - Entered the Profile Name as "Owner."
 - Clicked "Save."
3. **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.



4. Saved the Profile

- Clicked "Save" to apply the permissions.

Activity 2: Creating the Employer 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 "Employer."
- 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.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'profiles' entered and a list of items including 'Users' and 'Profiles'. The main content area is titled 'Profiles' and shows the 'Custom Object Permissions' section. This section contains two tables of permissions for different objects. The first table lists 'consumers' and 'rice details' with permissions for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All). The second table lists 'rice mills' and 'supplier' with similar permissions. Below these tables are sections for 'Session Settings' (Session Times Out After: 2 hours of inactivity, Session Security Level Required at Login: --None--) and 'Password Policies' (User passwords expire in: 90 days, Enforce password history: 3 passwords remembered, Minimum password length: 8, Password complexity requirement: Must include alpha and numeric characters, Password question requirement: Cannot contain password, Maximum invalid login attempts: 10).

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

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
rice mills	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
supplier	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity
Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: 90 days
Enforce password history: 3 passwords remembered
Minimum password length: 8
Password complexity requirement: Must include alpha and numeric characters
Password question requirement: Cannot contain password
Maximum invalid login attempts: 10

6. Saved the Profile

- 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

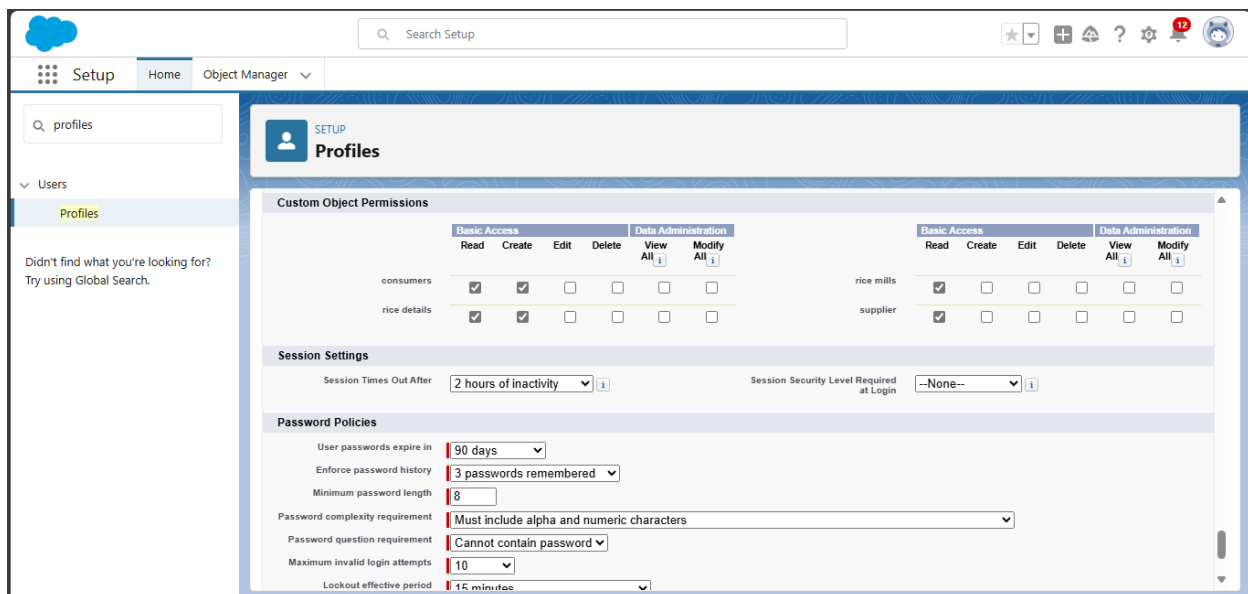
- While still on the profile page, clicked "Edit."

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.



The screenshot displays the 'Profiles' configuration page. On the left, a sidebar shows 'Setup' with 'Profiles' selected. The main content area is titled 'Profiles' and contains several sections:

- Custom Object Permissions:** A table with columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All). It lists permissions for 'consumers', 'rice details', 'rice mills', and 'supplier'. Checkmarks are present for 'Read' and 'Create' for all objects.
- Session Settings:** 'Session Times Out After' is set to '2 hours of inactivity'. 'Session Security Level Required at Login' is set to '--None--'.
- Password Policies:** Includes settings for 'User passwords expire in' (90 days), 'Enforce password history' (3 passwords remembered), 'Minimum password length' (8), 'Password complexity requirement' (Must include alpha and numeric characters), 'Password question requirement' (Cannot contain password), 'Maximum invalid login attempts' (10), and 'Lockout effective period' (15 minutes).

6. Saved the Profile

- Clicked "Save" to apply the permissions.

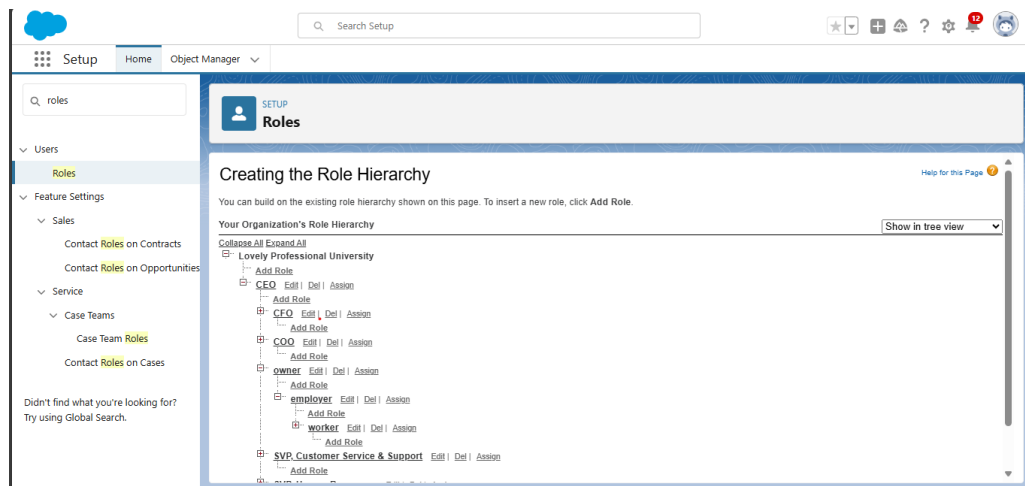
Milestone 8 : Role & Role Hierarchy

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

- From the setup page, I typed "Users" in the Quick Find box and selected "Users."

2. Created a New User

- Clicked on "New User."

3. Filled in User Details for Vicky

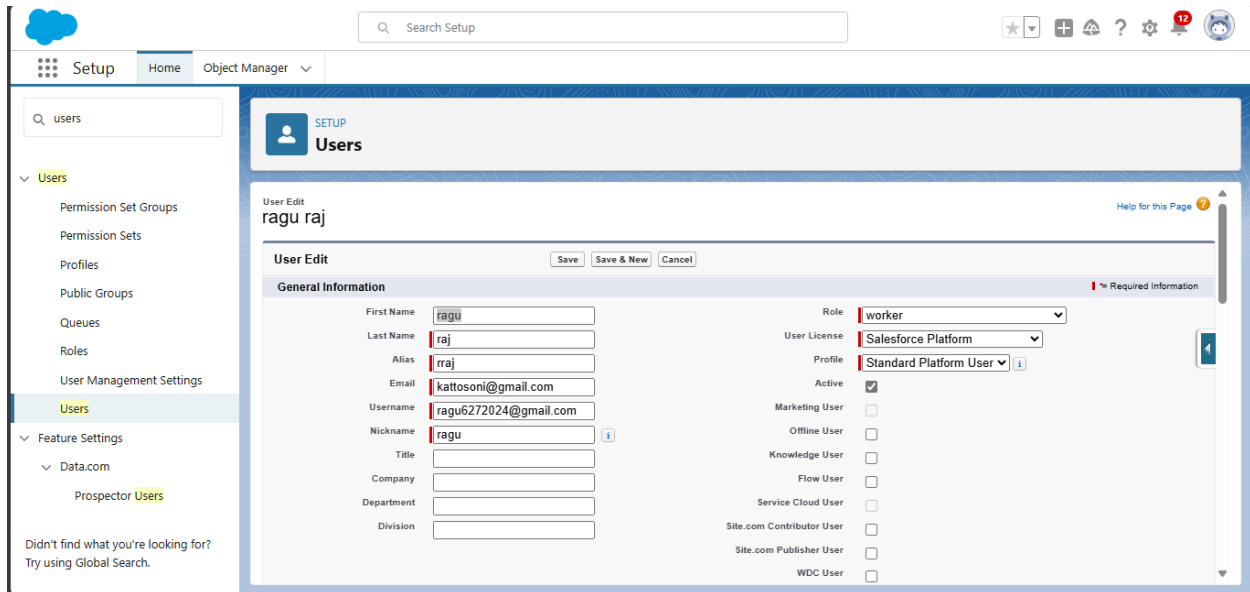
- **First Name:** Vicky
- **Last Name:** Y
- **Alias:** vy
- **Email ID:** kattosoni@gmail.com
- **Username:** vicky6272024@gmail.com
- **Nick Name:** vicky
- **Role:** Owner
- **User License:** Salesforce
- **Profile:** Owner
- Clicked "Save."

The screenshot shows the Salesforce 'Users' setup page. The left sidebar contains a search bar with 'users' and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, and Data.com. The main content area is titled 'Users' and shows the 'User Edit' form for a user named 'vicky y'. The form has tabs for 'General Information' and 'Advanced Information'. The 'General Information' tab is active, showing fields for First Name (vicky), Last Name (y), Alias (vy), Email (kattosoni@gmail.com), Username (vicky6272024@gmail.com), Nickname (vicky), Title, Company, Department, and Division. On the right side of the form, there are dropdown menus for Role (owner), User License (Salesforce), and Profile (owner), along with checkboxes for Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. A 'Save' button is visible at the top right of the form.

Activity 2: Creating Another User

The screenshot shows the Salesforce Setup interface. On the left, a sidebar contains a search bar with 'users' entered and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, and Prospector Users. The main content area is titled 'Users' and shows a 'User Edit' form for a user named 'ram ram'. The form includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. On the right, there are dropdown menus for Role (set to 'employer'), User License (set to 'Salesforce Platform'), and Profile (set to 'Standard Platform User'). Below these are checkboxes for various user types: Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. At the top of the form, there are buttons for 'Save', 'Save & New', and 'Cancel'. A 'Help for this Page' link is also visible.

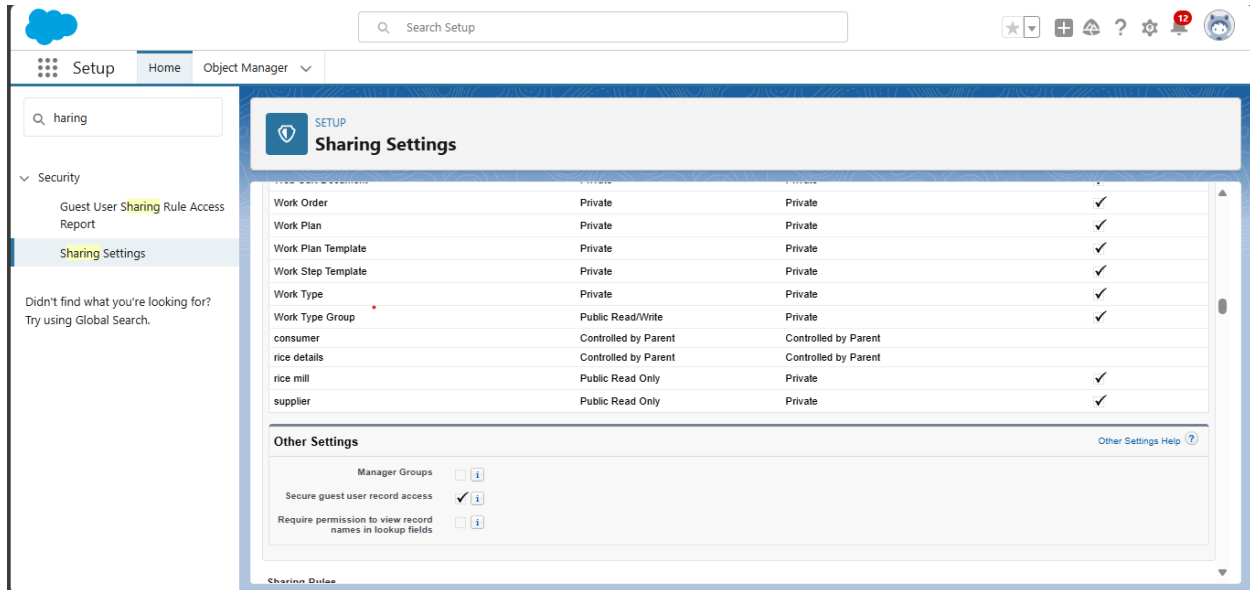
1. Navigated to User Setup
 - o From the setup page, I typed "Users" in the Quick Find box and selected "Users."
2. Created a New User
 - o Clicked on "New User."
3. Filled in User Details for Ram
 - o **First Name:** Ram
 - o **Last Name:** Ram
 - o **Alias:** rram
 - o **Email ID:** kattosoni@gmail.com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

Milestone 10 : Permission sets

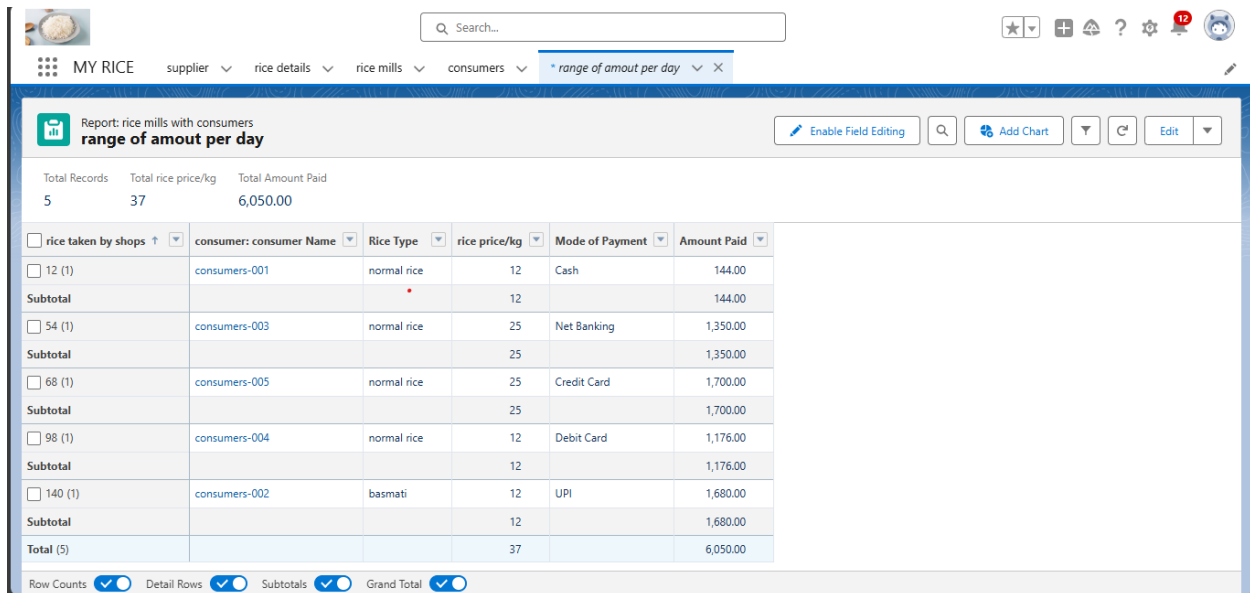
Activity 1: Creating OWD Settings



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



Report: rice mills with consumers
range of amount per day

Total Records: 5, Total rice price/kg: 37, Total Amount Paid: 6,050.00

<input type="checkbox"/> rice taken by shops ↑	consumer: consumer Name	Rice Type	rice price/kg	Mode of Payment	Amount Paid
<input type="checkbox"/> 12 (1)	consumers-001	normal rice	12	Cash	144.00
Subtotal			12		144.00
<input type="checkbox"/> 54 (1)	consumers-003	normal rice	25	Net Banking	1,350.00
Subtotal			25		1,350.00
<input type="checkbox"/> 68 (1)	consumers-005	normal rice	25	Credit Card	1,700.00
Subtotal			25		1,700.00
<input type="checkbox"/> 98 (1)	consumers-004	normal rice	12	Debit Card	1,176.00
Subtotal			12		1,176.00
<input type="checkbox"/> 140 (1)	consumers-002	basmati	12	UPI	1,680.00
Subtotal			12		1,680.00
Total (5)			37		6,050.00

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

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.

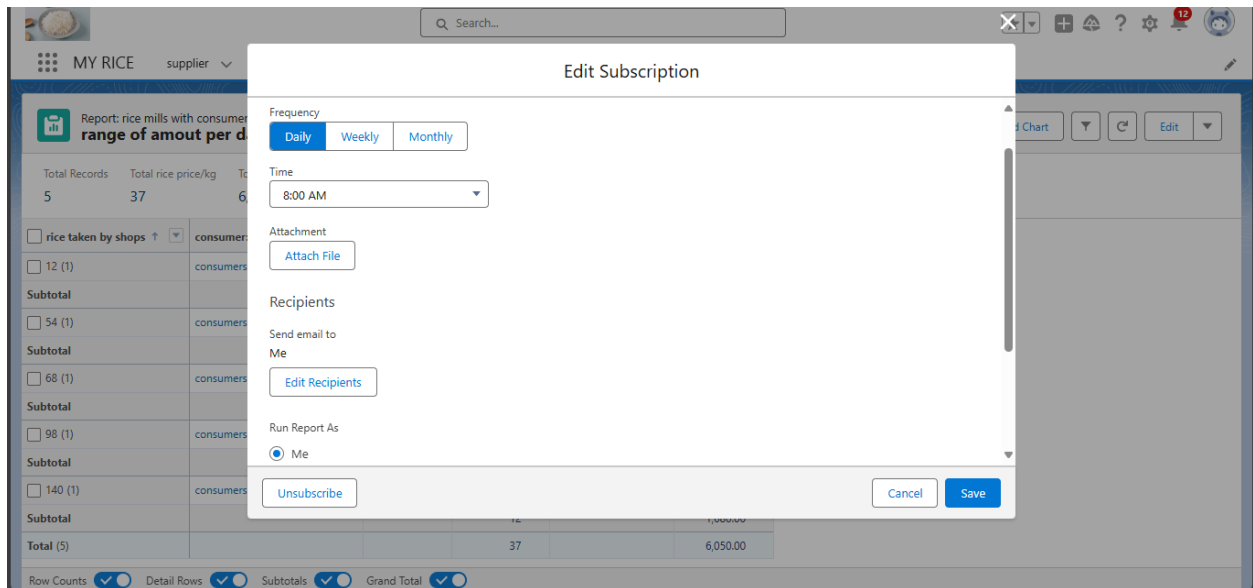
6. Grouped Rows

- Selected "Rice Taken by Shops" in the GROUP ROWS section.

7. Saved and Ran the Report

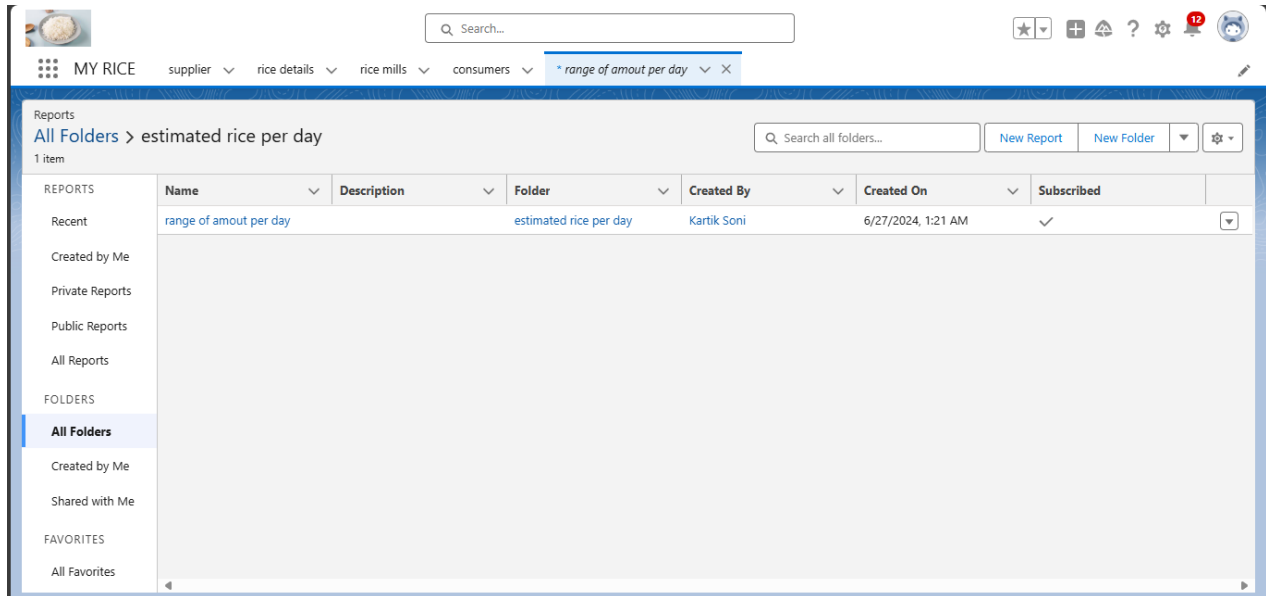
- Clicked "Save & Run."
- Named the report as "Range of Amount Per Day."
- Clicked "Save."

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.

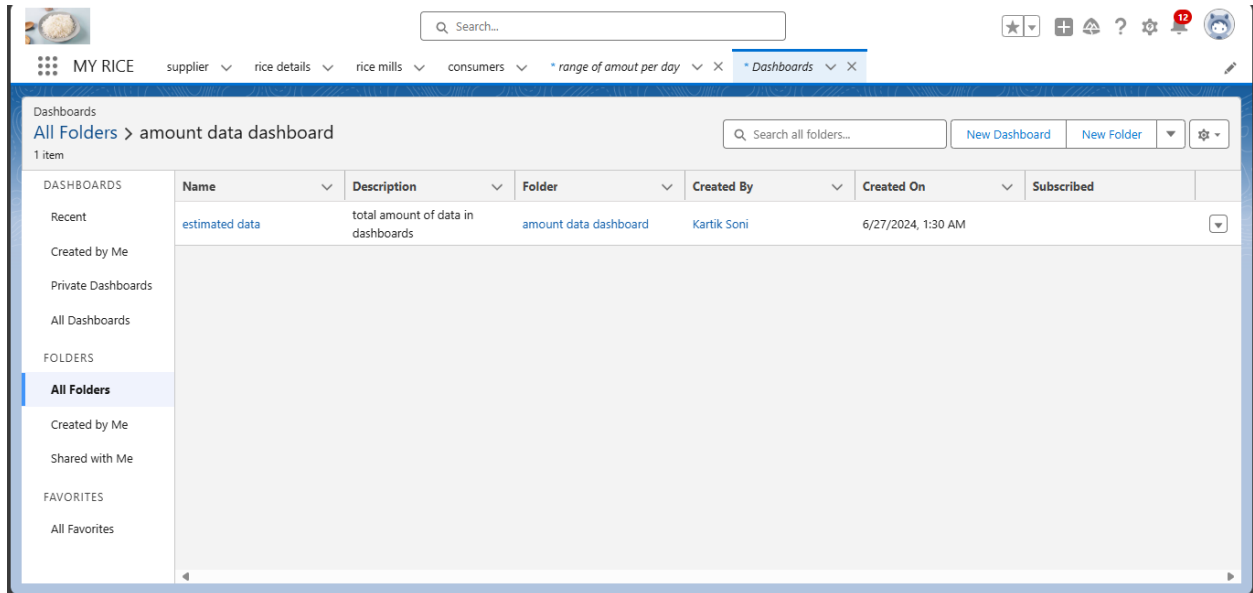
Activity 3: Create a Report Folder



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

Milestone 12 : Dashboards

Activity 1: Create Dashboard Folder



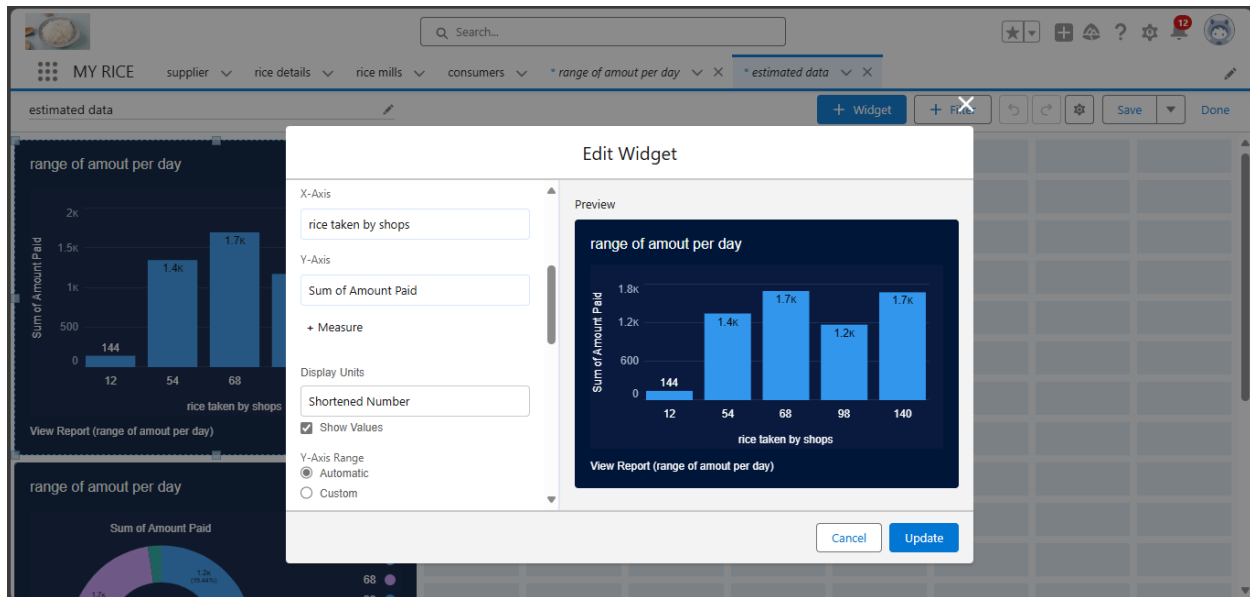
- 1. Navigated to Dashboard**
 - Clicked on the App Launcher and searched for "Dashboard."
- 2. Opened Dashboard Tab**
 - Clicked on the Dashboard tab.
- 3. Created a New Folder**
 - Clicked on "New Folder" within the Dashboard interface.
- 4. Configured Folder Details**
 - Gave the Folder Label as "Amount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

Activity 2: Create Dashboard

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

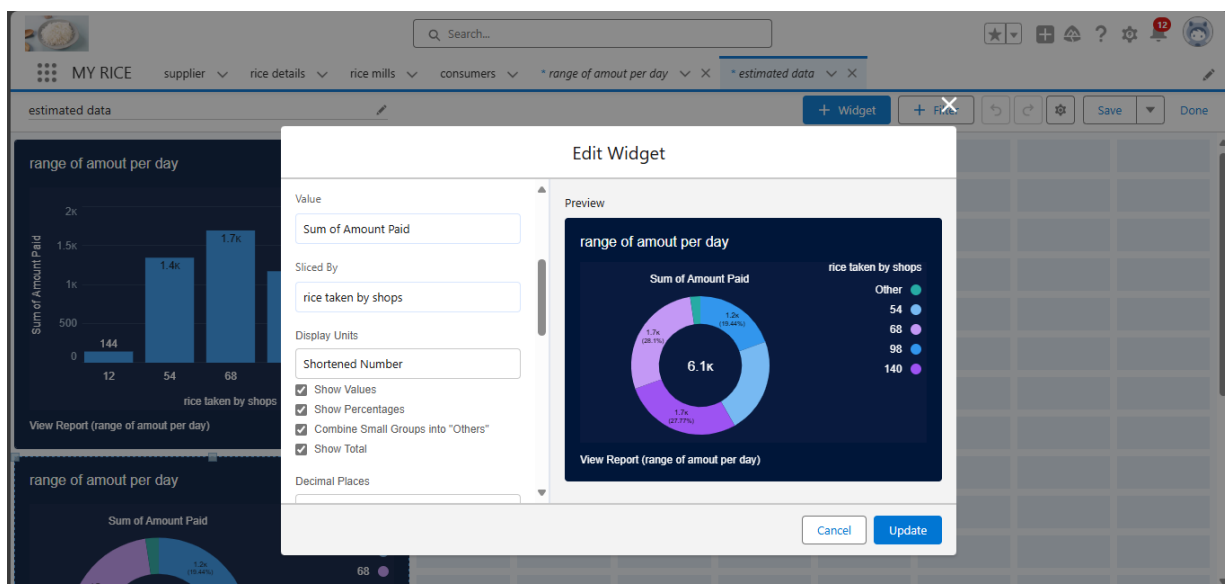
3. Adding Components to the Dashboard

○ 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

○ 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

- Completed adding both components to the dashboard layout.

