

Name: Krish Mehta

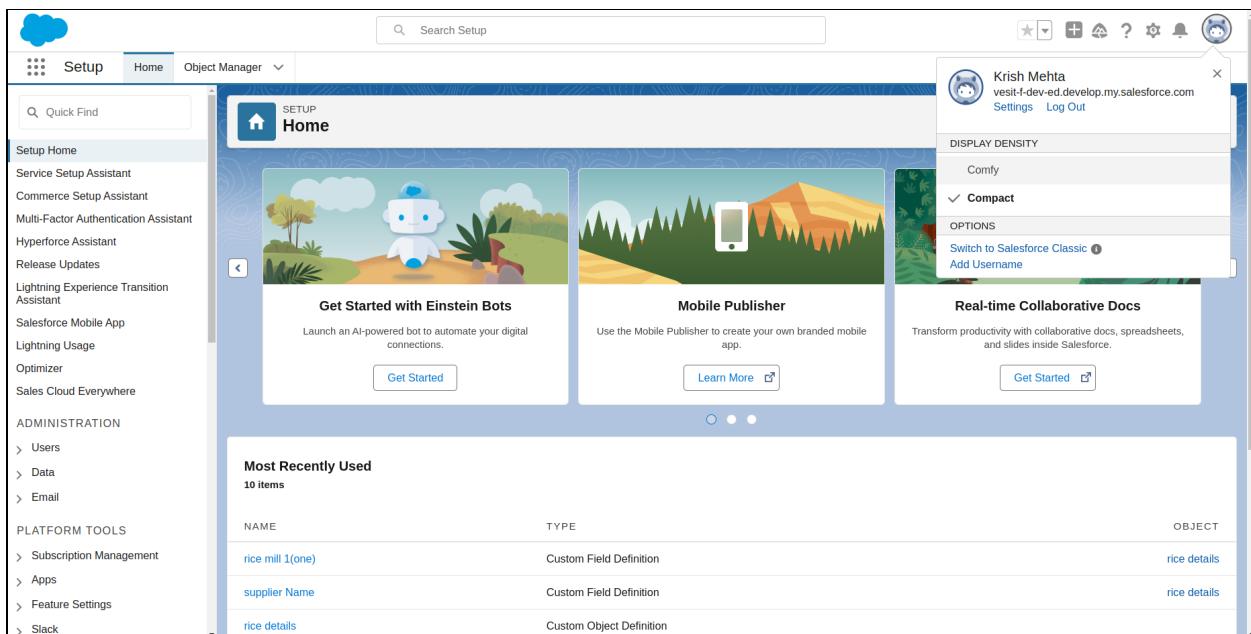
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## A CRM APPLICATION FOR WHOLESALE RICE MILL

### Introduction to Salesforce

#### Creating Developer Account

#### Account Activation



## Objects

### Create Supplier Object

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A new object named 'supplier' is being created. The 'Custom Object Information' section shows the label 'supplier' and plural label 'suppliers'. The object name is set to 'supplier'. The 'Context-Sensitive Help Setting' is set to open the standard Salesforce.com Help & Training window. The 'Content Name' dropdown is set to 'None'. The right sidebar displays the user profile of Krish Mehta and various display density and options settings.

### Create Rice Mill Object

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A new object named 'rice mill' is being created. The 'Custom Object Information' section shows the label 'rice mill' and plural label 'rice mills'. The object name is set to 'rice\_mill'. The 'Context-Sensitive Help Setting' is set to open the standard Salesforce.com Help & Training window. The 'Content Name' dropdown is set to 'None'. The right sidebar displays the user profile of Krish Mehta and various display density and options settings.

## Create Consumer Object

The screenshot shows the Salesforce Setup interface with the title 'Create Consumer Object'. The left sidebar lists various setup categories under 'Details'. The main area is titled 'Custom Object Information' and contains fields for 'Label' (set to 'Consumer'), 'Plural Label' (set to 'consumers'), 'Object Name' (set to 'consumer'), and a 'Description' text area. A note about context-sensitive help and record name labeling is present. The right sidebar shows user information ('Krish Mehta') and settings for 'DISPLAY DENSITY' (Compact selected), 'OPTIONS' (Switch to Salesforce Classic), and a 'Content Name' dropdown.

## Create Rice Details Object

The screenshot shows the Salesforce Setup interface with the title 'Create Rice Details Object'. The left sidebar lists various setup categories under 'Details'. The main area is titled 'Edit Custom Object rice details' and contains fields for 'Label' (set to 'rice details'), 'Plural Label' (set to 'rice details'), 'Object Name' (set to 'rice\_details'), and a 'Description' text area. A note about context-sensitive help and record name labeling is present. The right sidebar shows user information ('Krish Mehta') and settings for 'DISPLAY DENSITY' (Compact selected), 'OPTIONS' (Switch to Salesforce Classic), and a 'Content Name' dropdown.

## Tabs

### Creating a custom tab (For supplier object)

The screenshots illustrate the steps to create a custom tab for the 'supplier' object in Salesforce.

**Step 1: Enter the Details**

Select an existing custom object or [create a new custom object now](#).  
Object: supplier  
Tab Style: Airplane

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.  
Splash Page Custom Link: --None--

Enter a short description.  
Description: supplier custom object

**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 | Default On  
 Apply a different tab visibility for each profile

Profile	Tab Visibility
Analytics Cloud Integration User	[Default On]
Analytics Cloud Security User	[Default On]
Associate Software Engineer	[Default On]

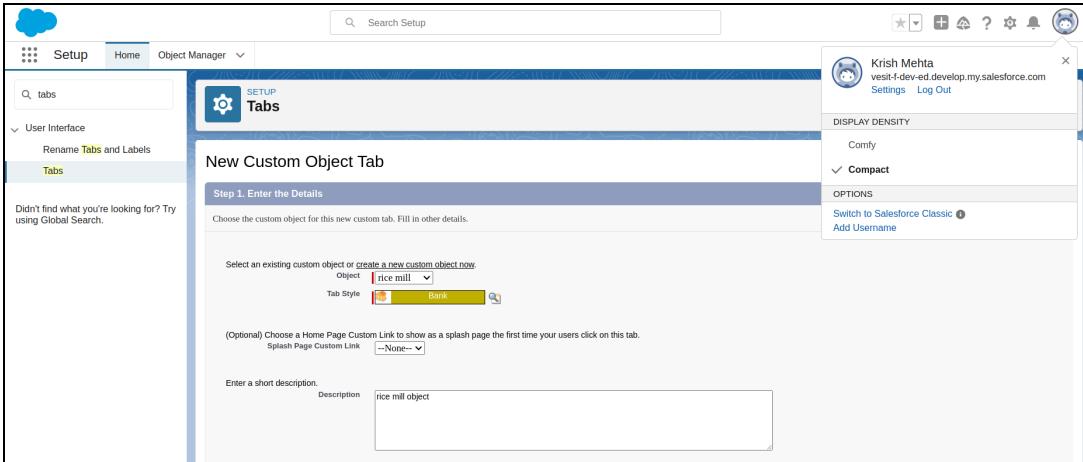
**Step 3: Available Tabs**

Community (standard\_\_Community)  
Site.com (standard\_\_Sites)  
Salesforce Chatter (standard\_\_Chatter)  
Content (standard\_\_Content)  
Analytics Studio (standard\_\_Insights)  
Sales Console (standard\_\_LightningSalesConsole)  
Service Console (standard\_\_LightningService)  
Sales (standard\_\_LightningSales)  
Lightning Usage App (standard\_\_LightningInstrumentation)  
Digital Experiences (standard\_\_SalesforceCMS)  
Queue Management (standard\_\_QueueManagement)  
Data Manager (standard\_\_DataManager)  
Subscription Management (standard\_\_RevenueCloudConsole)  
Salesforce Scheduler Setup (standard\_\_LightningScheduler)  
Bolt Solutions (standard\_\_LightningBolt)  
Org Management (Org\_Management)  
Automation (standard\_\_FlowsApp)

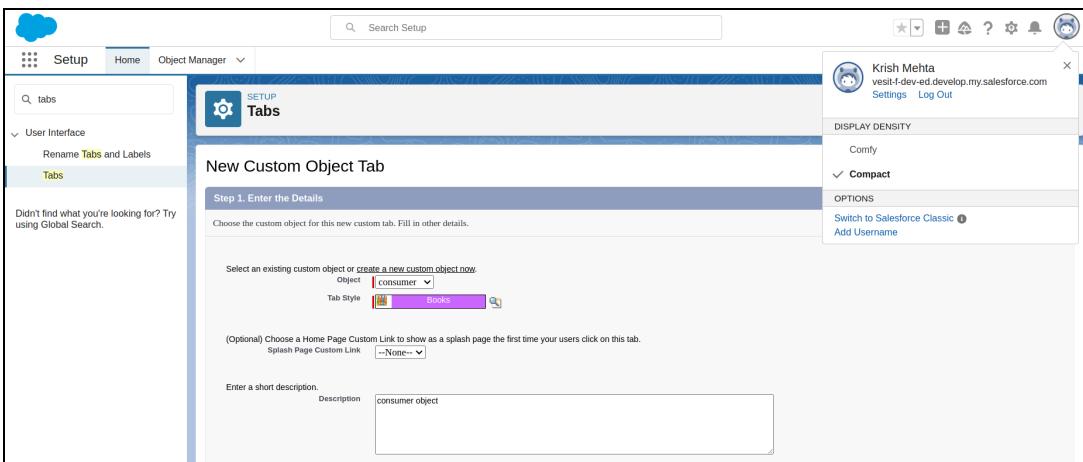
Append tab to users' existing personal customizations

## Creating remaining tabs

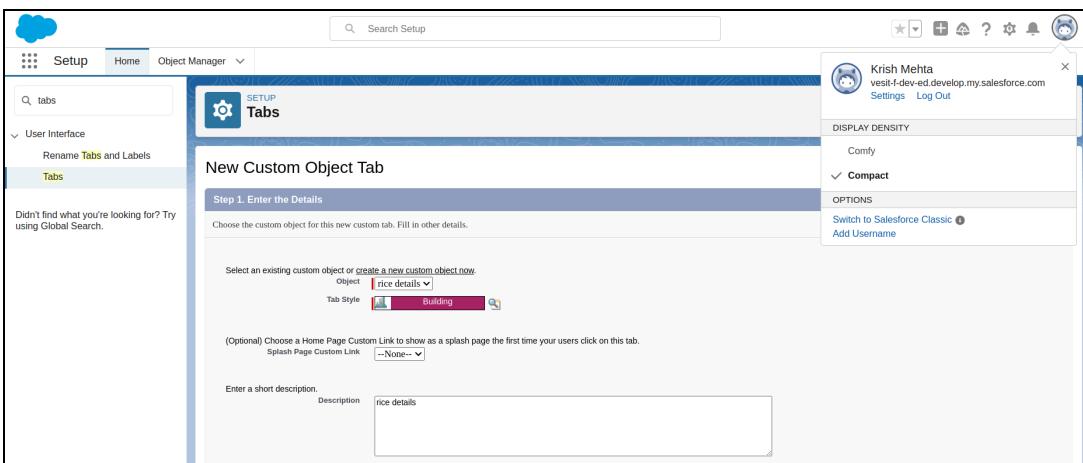
### Rice Mill Tab



### Consumer Tab

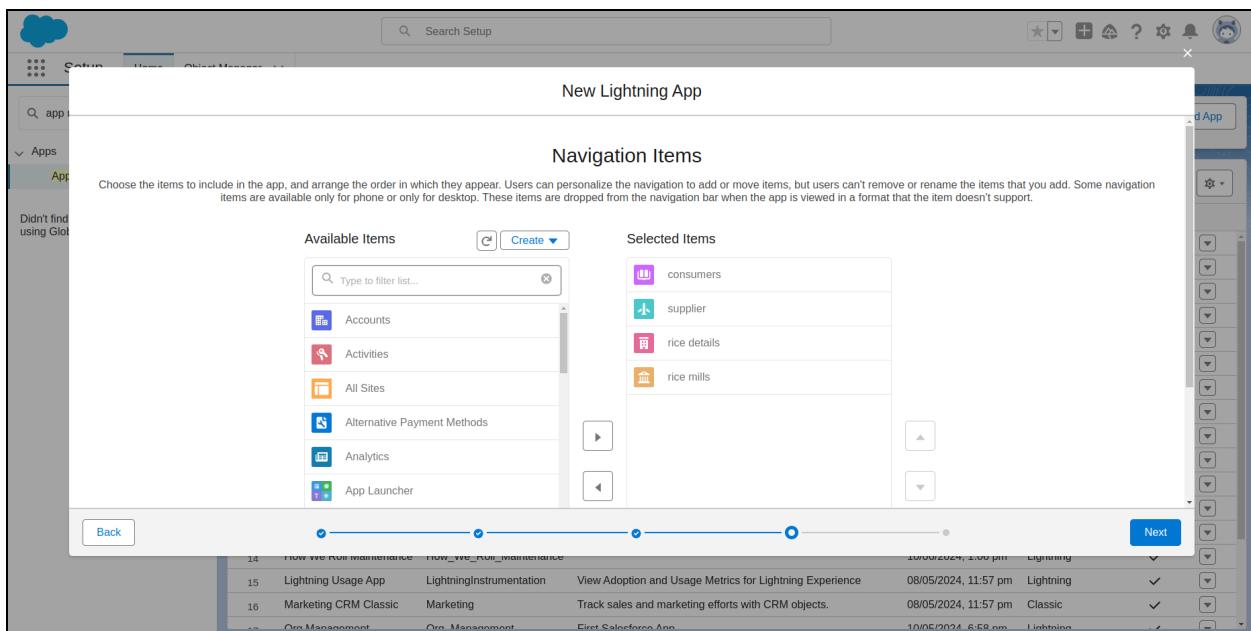
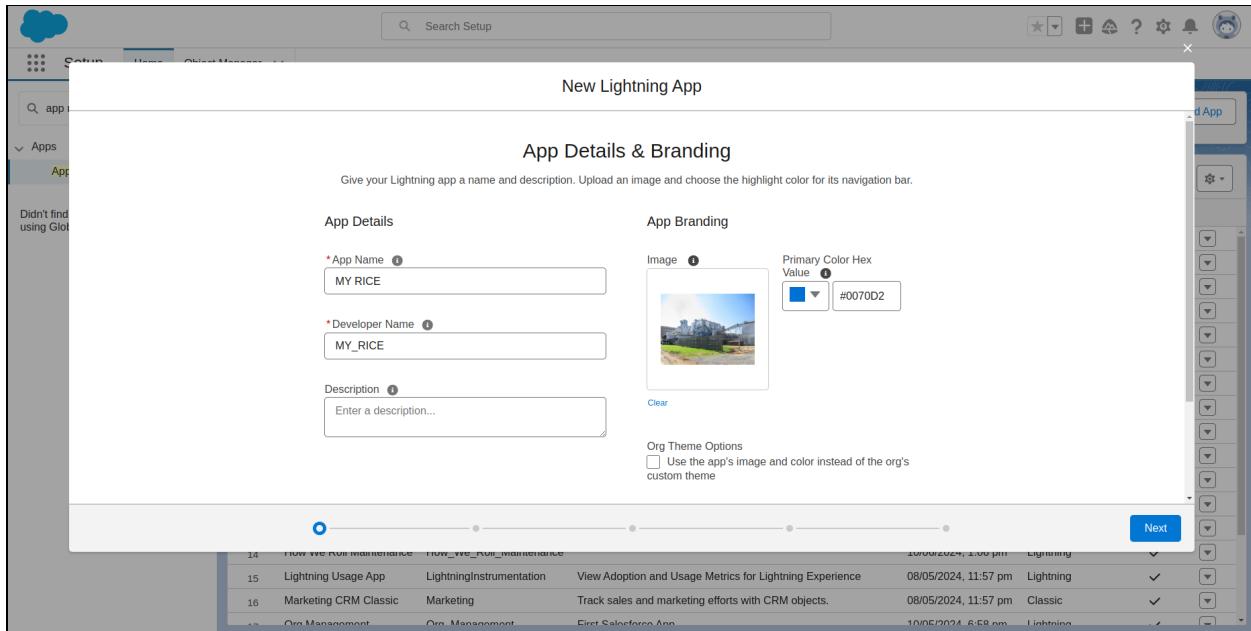


### Rice Details Tab



# The Lightning App

## Create a lightning app



## Fields

### Creating the number field in rice-details object

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'rice details'. On the left, a sidebar lists various setup options under 'Fields & Relationships'. The central panel displays the 'Custom Field Definition Detail' for 'rice distributed'. Key details shown include:

- Field Label:** rice distributed
- Field Name:** rice\_distributed
- API Name:** rice\_distributed\_\_c
- Description:** (empty)
- Data Owner:** (empty)
- Field Usage:** (empty)
- Data Sensitivity Level:** (empty)
- Compliance Categorization:** (empty)
- Created By:** Krish Mehta, 26/06/2024, 5:40 pm
- Modified By:** Krish Mehta, 26/06/2024, 5:40 pm

The 'General Options' section includes checkboxes for 'Required', 'Unique', 'External ID', and 'AI Prediction', all of which are unchecked.

### Creating the junction object

To create a junction object we created a master-detail between rice mill and rice details and supplier and rice details. (From image below we can see the relations --> rice\_mill\_1\_one\_c and supplier\_Name\_c)

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

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 1(one)	rice_mill_1_one__c	Master-Detail(rice mill)		✓
supplier Name	supplier_Name__c	Master-Detail(supplier)		✓

## Creating a master-detail relationship

This is between consumer and rice mill with rice mill as parent and consumer as child.

The screenshot shows the Salesforce Object Manager interface for creating a custom field named 'rice mill name' on the 'consumer' object. The 'Fields & Relationships' tab is selected. In the 'Master-Detail Options' section, 'Related To' is set to 'rice mill' and 'Child Relationship Name' is set to 'consumers'. The 'Data Type' is listed as 'Master-Detail'.

## Creating the Roll-up Summary

Roll up summary in supplier object on 'rice distributed' field which is present in rice details object.

The screenshot shows the Salesforce Object Manager interface for creating a custom field named 'sum of rice distributed' on the 'supplier' object. The 'Fields & Relationships' tab is selected. In the 'Roll-Up Summary Options' section, the 'Data Type' is set to 'Roll-Up Summary', the 'Summarized Object' is set to 'rice details', and the 'Field to Aggregate' is set to 'rice details: rice distributed'. The 'Summary Type' is set to 'SUM'.

Roll up summary in rice mills on 'rice distributed' field which is present in rice details.

The screenshot shows the 'Object Manager' interface for creating a custom field. The object selected is 'rice mill'. The field being created is named 'rice distributed to shops' with the API name 'rice\_distributed\_to\_shops\_c'. The data type is 'Roll-Up Summary' and it is summarized from the 'rice details' object. The summary type is 'SUM'. The field is owned by 'rice mill' and was created by Krish Mehta on June 26, 2024, at 5:54 pm.

Number field (rice\_taken\_by\_shops\_in\_kgs) created in consumer object

The screenshot shows the 'Object Manager' interface for creating a custom field. The object selected is 'consumer'. The field being created is named 'rice taken by shops in kgs' with the API name 'rice\_taken\_by\_shops\_in\_kgs\_c'. The data type is 'Number'. The field is owned by 'consumer' and was created by Krish Mehta on June 26, 2024, at 6:39 pm.

Roll up summary in rice mill on 'rice taken by shops in kgs' field which is present in rice details.

The screenshot shows the 'Object Manager' interface for creating a custom field. The object selected is 'rice mill'. The field being created is named 'rice taken' with the API name 'rice\_taken\_c'. The data type is 'Roll-Up Summary' and it is summarized from the 'consumer' object. The summary type is 'SUM'. The field is owned by 'rice mill' and was created by Krish Mehta on June 26, 2024, at 6:41 pm.

## Creating fields in Rice Mill Object

rice mill Custom Field  
rice price/kg

**Custom Field Definition Detail**

Field Label	rice price/kg	Object Name	rice.mill
Field Name	rice_price_kg	Data Type	Number
API Name	rice_price_kg_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By: Krish Mehta, 26/06/2024, 6:58 pm Modified By: Krish Mehta, 26/06/2024, 6:58 pm

## Creating fields in Consumer Object

consumer Name Name Auto Number ✓

Created By CreatedByd Lookup(User)

email email\_c Email

First name First\_name\_c Text(100)

Last Modified By LastModifiedByd Lookup(User)

Last name Last\_name\_c Text(100)

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

## Creating Cross Object Formula Field In Consumer Object

### Amount Paid

consumer Custom Field  
Amount Paid

**Custom Field Definition Detail**

Field Label	Amount Paid	Object Name	consumer
Field Name	Amount_Paid		
API Name	Amount_Paid_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By: Krish Mehta, 26/06/2024, 7:15 pm Modified By: Krish Mehta, 26/06/2024, 7:15 pm

**Formula Options**

Data Type	Formula
Decimal Places	2
rice_taken_by_shops_c * rice_mill_name_c.rrice_price_kg_c	

## Consumer Name

The screenshot shows the Salesforce Setup interface for creating a custom field. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main title is 'consumer Custom Field Consumer Name'. The left sidebar lists various field-related options like 'Details', 'Fields & Relationships', and 'Page Layouts'. The right panel displays the 'Custom Field Definition Detail' for 'Consumer Name'. Key details include:

Field Label	Consumer Name
Field Name	Consumer_Name
API Name	Consumer_Name_c
Description	Help Text
Data Owner	Field Usage
Data Sensitivity Level	Compliance Categorization
Created By	Krish Mehta, 26/06/2024, 7:16 pm
Modified By	Krish Mehta, 26/06/2024, 7:16 pm
Data Type	Formula
First_name_c + ' ' + Last_name_c	

## Creating The Validation Rule

The screenshot shows the Salesforce Setup interface for creating a validation rule. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main title is 'consumer Validation Rule'. The left sidebar lists various validation rule-related options like 'Validation Rule Detail', 'Edit', and 'Clone'. The right panel displays the 'Validation Rule Detail' for 'Phone number or email blank rule'. Key details include:

Rule Name	Phonenumberoremailblankrule
Error Condition Formula	OR( ISBLANK( Phone_number_c ), ISBLANK( email_c ) )
Error Message	please fill in your phone number.
Description	phone number and email number should not be blank
Created By	Krish Mehta, 26/06/2024, 7:21 pm
Active	✓
Error Location	Top of Page
Modified By	Krish Mehta, 26/06/2024, 7:21 pm

## Page Layouts

### Creating the Page Layout (For Consumer Object)

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. Under the 'consumer' object, the 'Page Layouts' tab is active. The main area displays a preview of the page layout with sections for 'Personal Details', 'rice details', 'Receipt details', and 'System Information'. Fields like 'First name', 'Last name', 'Phone number', and 'Email' are listed with sample values. Buttons at the top include 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'.

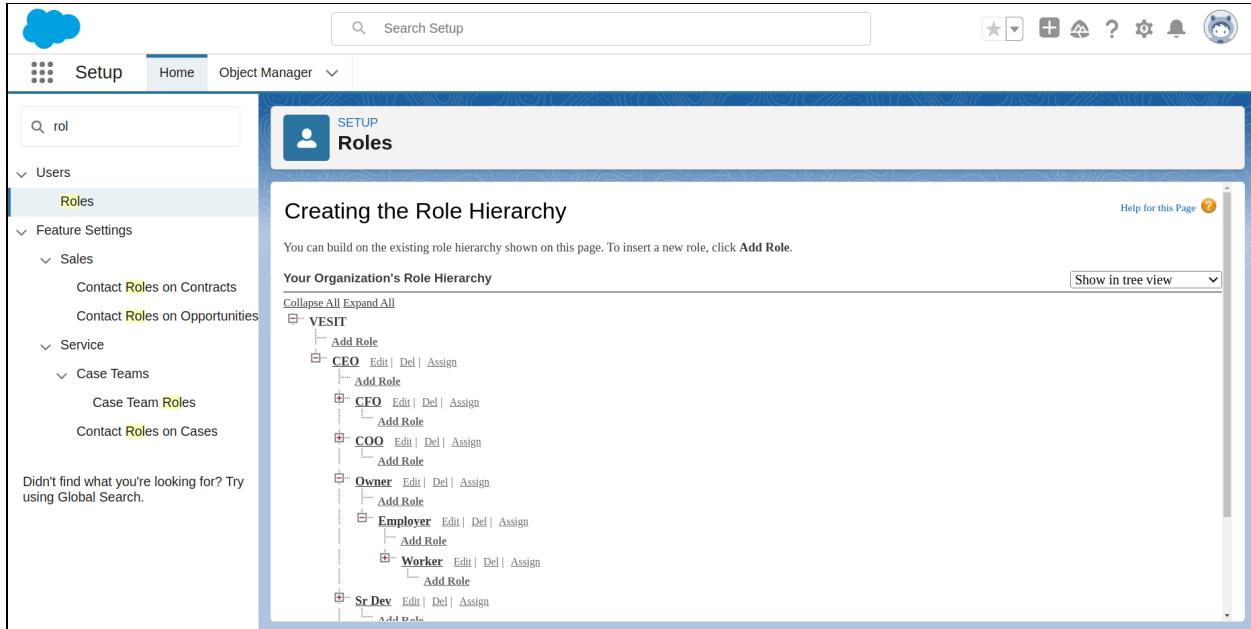
## Profiles

### Owner, Employer and Worker Profile

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A search bar at the top finds 'prof'. The 'Profiles' tab is active under the 'Users' section. The main area displays a table of profiles with columns for 'Action', 'Profile Name', 'User License', and status indicators. Profiles listed include 'Custom: Sales Profile', 'Custom: Marketing Profile', 'Custom: Support Profile', 'Associate Software Engineer', 'Owner' (selected), 'Employer', 'Worker' (selected), 'System Administrator', 'Chatter Free User', and 'Analytics Cloud Integration User'. A message at the bottom left says 'Didn't find what you're looking for? Try using Global Search.' Navigation buttons at the bottom include '1-25 of 45', 'Selected 3', 'Previous', 'Next', and 'Page 1 of 2'.

## Role and Role Hierarchy

**Adding Owner Role under CEO. Adding Employer under Owner and adding Worker under Employer.**

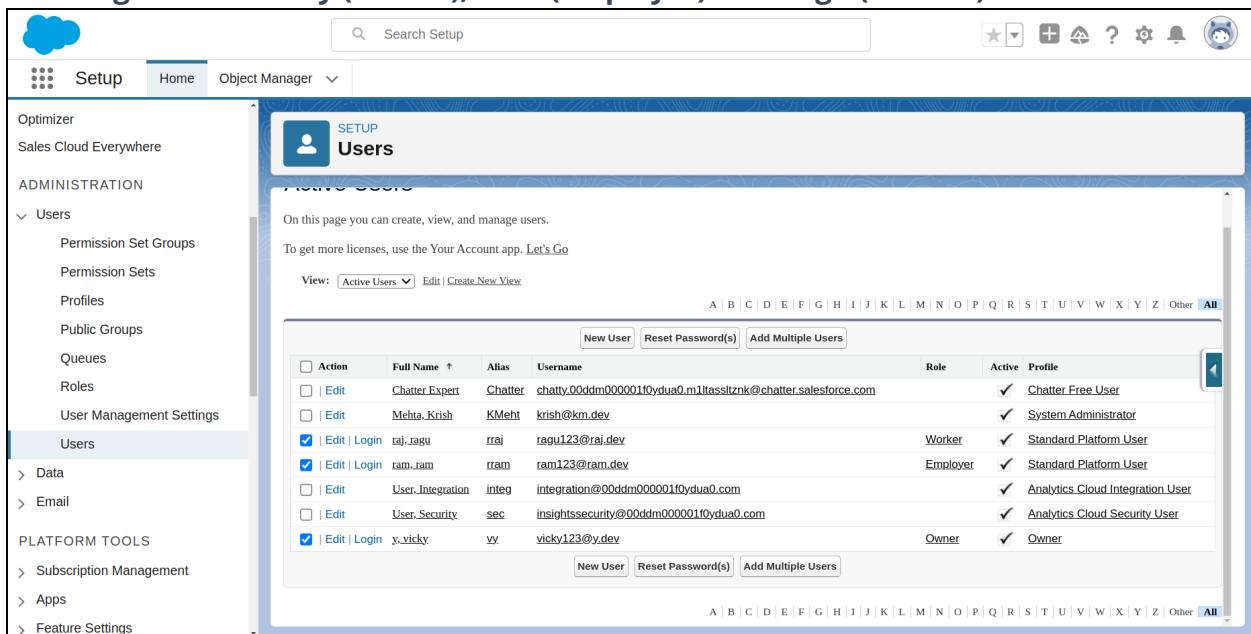


The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. On the left, a sidebar lists various setup categories like Feature Settings, Sales, Service, and Case Teams. The main area displays the 'Creating the Role Hierarchy' section. A tree view titled 'Your Organization's Role Hierarchy' shows the following structure:

- VESTIT
  - Add Role
    - CEO (Edit | Del | Assign)
    - CFO (Edit | Del | Assign)
    - COO (Edit | Del | Assign)
    - Owner (Edit | Del | Assign)
      - Employer (Edit | Del | Assign)
        - Worker (Edit | Del | Assign)
    - Sr Dev (Edit | Del | Assign)

## Users

**Creating 3 users: Vicky (Owner), Ram (Employer) and Ragu (Worker)**



The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar includes sections like Optimizer, Sales Cloud Everywhere, Administration, and Platform Tools. The main area shows a table of active users:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit	Chatter Expert	Chatter	chatty.00ddm000001f0ydua0.m1tassltznk@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>   Edit	Mehta, Krish	KMehrt	krish@km.dev		<input checked="" type="checkbox"/>	System Administrator
<input checked="" type="checkbox"/>   Edit   Login	raj, ragu	raj	ragu123@raj.dev	Worker	<input checked="" type="checkbox"/>	Standard Platform User
<input checked="" type="checkbox"/>   Edit   Login	ram, ram	ram	ram123@ram.dev	Employer	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>   Edit	User_Integration	integ	integration@00ddm000001f0ydua0.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User_Security	sec	insightssecurity@00ddm000001f0ydua0.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input checked="" type="checkbox"/>   Edit   Login	y.vicky	yy	vicky123@y.dev	Owner	<input checked="" type="checkbox"/>	Owner

## Permission Sets

### Creating OWD Setting

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

## Reports

### Create Report

Create 10 records in consumer object

The screenshot shows the Salesforce consumer list view. At the top, there are buttons for 'New', 'Import', and 'Assign Label'. Below the header, it says '10 items • Updated 3 minutes ago'. The list contains 10 records, each with a checkbox and a consumer name:

- 1 consumer-010
- 2 consumer-009
- 3 consumer-008
- 4 consumer-007
- 5 consumer-006
- 6 consumer-005
- 7 consumer-004
- 8 consumer-003
- 9 consumer-002
- 10 consumer-001

### Creating the Report and Saving it

The screenshot shows the Lightning Report interface. The report title is 'rice mills with consumers range of amount per day'. It displays the following summary statistics:

Total Records	Total rice price/kg	Total Amount Paid
10	55	895.00

The report table lists transactions between rice mills and consumers, showing details like rice type, mode of payment, and amount paid. The data is grouped by consumer and subtotalled.

	rice taken by shops	rice mill: rice mill Name	consumer: consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
Subtotal	2 (2)	rice-003 rice-002	consumers-005 consumers-009	basmati basmati	25 15	Net banking Cash	50.00 30.00
Subtotal	3 (1)	rice-001	consumers-003	basmati	10	Net banking	30.00
Subtotal	4 (1)	rice-002	consumers-007	basmati	15	Debit card	60.00
Subtotal	5 (2)	rice-001 rice-002	consumers-001 consumers-004	basmati basmati	10 15	Credit card Cash	50.00 75.00
Subtotal	10 (3)	rice-002 rice-003 rice-001	consumers-002 consumers-006 consumers-008	basmati normal rice normal rice	15 25 10	Debit card Cash UPI	150.00 250.00 100.00
Subtotal	20 (1)	rice-004	consumers-010	normal rice	5	Cash	100.00
Total (10)					55		895.00

At the bottom, there are checkboxes for Row Counts, Detail Rows, Subtotals, and Grand Total.

## Sharing Report to Owner

The screenshot shows the 'Edit Subscription' dialog box overlaid on a Lightning Report. The report displays a list of rice mills with consumers, showing subtotals for each category. The dialog box has tabs for 'Frequency' (Daily, Weekly, Monthly) and 'Time' (set to 9:00 am). It includes an 'Attachment' section with a link to a formatted report (Excel Format.xlsx). The 'Recipients' section shows 'Me' selected, and a recipient named 'Krish Mehta' is listed. Buttons for 'Cancel' and 'Save' are at the bottom.

## Create a Report Folder

The screenshot shows the 'Reports' page in the 'MY RICE' application. On the left, there's a sidebar with categories like 'REPORTS', 'FOLDERS', and 'FAVORITES'. Under 'REPORTS', 'All Folders' is selected. A table lists a single item: 'range of amount per day' (Name), 'estimated rice per day' (Folder), 'Krish Mehta' (Created By), and '27/6/2024, 5:03 am' (Created On). The top navigation bar includes links for 'Home', 'consumers', 'supplier', 'rice details', 'rice mills', and 'Reports'.

## Dashboards

### Create a Dashboard Folder

The screenshot shows the 'Analytics' section of a software application. On the left, there's a sidebar with 'Analytics' selected, followed by 'Home', 'Browse' (which is highlighted in blue), and 'Favorites'. Below this is a 'Collections' section with a note to 'Create a collection to start organizing your analytics content.' The main area is titled 'Browse > amount data dashboard'. It features a search bar at the top, followed by three tabs: 'All Items', 'Dashboards' (which is selected and highlighted in blue), and 'Folders'. Below these are four filter boxes: 'Created By Anybody', 'Created On Any Date', 'Last Modified By Anybody', and 'Last Modified On Any Date'. A message at the bottom states 'No items to display. Try different filters to see more results.' with a 'Learn More' link.

### Create a Dashboard

The screenshot shows the 'Rice Mill Dashboard' as of 27-Jun-2024, 5:22 am, viewing as Krish Mehta. The top navigation bar includes 'MY RICE', 'consumers', 'supplier', 'rice details', 'rice mills', 'Reports', 'Dashboards', and a search bar. On the right, there are 'Refresh', 'Edit', and 'Subscribe' buttons. The dashboard displays two charts: a bar chart titled 'range of amount per day' and a donut chart titled 'range of amount per day'. The bar chart shows the sum of amount paid for different rice taken by shops. The donut chart shows the sum of rice price/kg across different categories. Both charts have a 'View Report' link below them.

rice taken by shops	Sum of amount Paid
2	80
3	30
4	60
5	125
10	500
20	100

rice taken by shops	Sum of rice price/kg
2	50 (34.48%)
3	40 (27.09%)
4	25 (17.24%)
5	15 (10.34%)
10	10 (6.99%)
20	5 (3.49%)