

# A CRM APPLICATION FOR WHOLESALE RICE MILL

## 1.Objects:

- \* Supplier1
- \* Rice Mill1
- \* Rice details1
- \* Consumer1

The screenshot shows the Salesforce Object Manager interface. The browser address bar indicates the URL is [lakireddybalireddycolleg-6a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home](https://lakireddybalireddycolleg-6a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home). The page title is "Object Manager". A search bar at the top right contains the text "consumer". The main content area displays a table titled "Object Manager" with two items listed:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
consumer	consumer_c	Custom Object		27/11/2024	✓
consumer1	consumer1_c	Custom Object		27/11/2024	✓

The bottom of the screen shows a Windows taskbar with various application icons and system status indicators.

Salesforce Object Manager - Object Manager | Salesforce

lakireddybalireddycolleg-6a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

Object Manager

rice

Schema Builder Create

LABEL API NAME TYPE DESCRIPTION LAST MODIFIED DEPLOYED

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Cart Item Price Adjustment	CartItemPriceAdjustment	Standard Object			
Price Book	Pricebook2	Standard Object			
Price Book Entry	PricebookEntry	Standard Object			
rice details	rice_details_c	Custom Object		27/11/2024	✓
rice details1	rice_details1_c	Custom Object		27/11/2024	✓
rice mill	rice_mill_c	Custom Object		27/11/2024	✓
rice mill1	rice_mill1_c	Custom Object		27/11/2024	✓

25°C Haze Search ENG IN 21:01 28-11-2024

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lakireddybalireddycolleg-6a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

Object Manager

supp

Schema Builder Create

LABEL API NAME TYPE DESCRIPTION LAST MODIFIED DEPLOYED

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
supplier	supplier_c	Custom Object		27/11/2024	✓
supplier1	supplier1_c	Custom Object		27/11/2024	✓

25°C Haze Search ENG IN 21:04 28-11-2024

## 2. Tabs :

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected under 'User Interface'. The main content area displays the 'Custom Tabs' section, which allows users to create new custom tabs to extend Salesforce functionality or build new applications. It includes sections for 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. The 'Custom Object Tabs' section lists four entries:

Action	Label	Tab Style	Description
Edit   Del	consumer1s	Box	
Edit   Del	rice.details1	Chalkboard	
Edit   Del	rice.mill1s	Box	
Edit   Del	supplier1	Box	

## 3. Create a Lightning App

App name - MY RICE

The screenshot shows the Salesforce Lightning App interface for 'MY RICE'. The top navigation bar includes tabs for 'supplier1', 'rice mill1s', 'rice details1', 'consumer1s', and 'estimated data'. The 'supplier1' tab is currently active. Below the navigation, the 'Recently Viewed' tab is selected, showing a list of recently viewed items. The list header indicates '0 items • Updated a few seconds ago'.

## 4. Fields

### consumer1 fields

The screenshot shows the Salesforce Object Manager for the 'consumer1' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main content area is titled 'Fields & Relationships' and displays 14 items sorted by Field Label. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Key fields include 'Amount Paid' (Formula Number), 'Consumer Name' (Formula Text), and several lookup fields such as 'Created By' (Lookup(User)) and 'Mode of payment' (Picklist). The 'Rice mill1' section contains fields like 'rice mill1 name' (Master-Detail) and 'rice type' (Picklist).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid__c	Formula (Number)		
Consumer Name	Consumer_Name__c	Formula (Text)		
consumer1 Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
email	email__c	Email		
First name	First_name__c	Text(20)		
Last Modified By	LastModifiedById	Lookup(User)		
Last name	Last_name__c	Text(20)		
Mode of payment	Mode_of_payment__c	Picklist		
Phone number	Phone_number__c	Phone		
rice mill1 name	rice_mill1__c	Master-Detail(rice mill1)		✓
Rice taken by shops	Rice_taken_by_shops__c	Number(5, 0)		
rice taken by shops in kgs	rice_taken__c	Number(18, 0)		
Rice type	Rice_type__c	Picklist		

### Rice mill1 fields

The screenshot shows the Salesforce Object Manager for the 'rice mill1' object. The left sidebar lists various setup categories. The main content area is titled 'Fields & Relationships' and displays 7 items sorted by Field Label. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Key fields include 'Created By' (Lookup(User)), 'Last Modified By' (Lookup(User)), and 'Owner' (Lookup(User/Group)). The 'rice distributed to shops' field is a roll-up summary (SUM rice details1). The 'rice mill1 Name' field is an Auto Number.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
rice distributed to shops	rice_distributed_to_shops__c	Roll-Up Summary (SUM rice details1)		
rice mill1 Name	Name	Auto Number		✓
rice price/kg	rice_price_kg__c	Number(5, 0)		
rice taken	rice_taken__c	Roll-Up Summary (SUM consumer1)		

## Supplier1 fields

The screenshot shows the Salesforce Object Manager for the object 'supplier1'. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays the 'Fields & Relationships' section with the following data:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
sum of rice distributed	sum_of_rice_distributed_c	Roll-Up Summary (SUM rice details1)		
supplier1 Name	Name	Text(80)		✓

The status bar at the bottom shows a rain shower icon, the date 28-11-2024, and the time 21:19.

## Rice details1 fields

The screenshot shows the Salesforce Object Manager for the object 'rice details1'. The left sidebar lists various setup options. The main area displays the 'Fields & Relationships' section with the following data:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
rice details1 Name	Name	Auto Number		✓
rice distributed	rice_distributed_c	Number(5, 0)		
rice mill 1(one)	rice_mill1_c	Master-Detail(rice mill1)		✓
supplier name	supplier_name_c	Number(5, 0)		
supplier Name	supplier1_c	Master-Detail(supplier1)		✓

The status bar at the bottom shows a watchlist icon, the date 28-11-2024, and the time 21:18.

## 5. creating the page layout

page layout name as “consumer layout”

- rice details - Rice taken by shop, rice type.
- Personal details - First name, last name, consumer name, phone number, email, rice mill name
- Receipt details - Mode of payment, Amount paid.

SETUP > OBJECT MANAGER  
consumer1

Save | Quick Save | Preview As... | Cancel | Undo | Redo | Layout Properties

Fields

Section	Field Name	Description
Blank Space	Consumer Name	Last Modified By
Blank Space	Created By	Rice taken by shops
Blank Space	Last name	Rice taken by sh...
Blank Space	Amount Paid	Mode of payment
Blank Space	Consumer1 Name	First name
Blank Space		Phone number
Blank Space		Rice type

rice details

Rice taken by shops: 83.041  
Rice type: Sample Text

Personal details

Consumer1 Name: GEN-2004-001234  
Consumer Name: Sample Text  
First name: Sample Text  
Last name: Sample Text  
Phone number: 1-415-555-1212  
Email: sarah.sample@company.com  
rice mill name: Sample\_Text

Receipt details

Mode of payment: Sample Text  
Amount Paid: 178.11

Information (Header visible on edit only)  
rice taken by shops in kgs: 97.455

## 6. Profile

Owner Profile:

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The URL in the browser is [lakireddybalireddycolleg-6a-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home](https://lakireddybalireddycolleg-6a-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home). The page title is 'Profiles'. On the left, there's a sidebar with 'Users' and 'Profiles' selected. A search bar at the top right contains 'Search Setup'. The main content area displays a table of profiles:

Action	Profile Name	User License	Custom
<input type="checkbox"/>	owner	Salesforce	<input checked="" type="checkbox"/>

At the bottom of the table, there are buttons for 'New Profile' and 'Edit | Delete'. Below the table, it says '1-1 of 1' and '0 Selected'. The status bar at the bottom shows the date and time as 28-11-2024 21:35.

## employer Profile :

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The URL in the browser is [lakireddybalireddycolleg-6a-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home](https://lakireddybalireddycolleg-6a-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home). The page title is 'Profiles'. The sidebar on the left shows 'Users' and 'Profiles' selected. The main content area displays a table of profiles:

Action	Profile Name	User License	Custom
<input type="checkbox"/>	employer	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/>	External Apps Login User	External Apps Login	<input type="checkbox"/>
<input type="checkbox"/>	External Identity User	External Identity	<input type="checkbox"/>

At the bottom of the table, there are buttons for 'New Profile' and 'Edit | Delete'. Below the table, it says '1-3 of 3' and '0 Selected'. The status bar at the bottom shows the date and time as 28-11-2024 21:37.

## Worker Profile:

The screenshot shows the Salesforce Setup interface under the Profiles category. The left sidebar has a search bar with 'prof' typed in and a 'Profiles' section selected. The main area is titled 'Profiles' and shows a table of two profiles: 'Work.com\_Only\_User' and 'worker'. The 'worker' profile is highlighted. The table includes columns for Action, Profile Name, User License, and Custom. A navigation bar at the bottom shows '1-2 of 2' and '0 Selected'. The system status bar at the bottom right indicates it's 21:38 on 28-11-2024.

## 7. Role & Role Hierarchy

### Creating owner Role and Creating employer roles

The screenshot shows the Salesforce Setup interface under the Roles category. The left sidebar has a search bar with 'roles' typed in and a 'Roles' section selected. The main area is titled 'Creating the Role Hierarchy' and displays a hierarchical tree of roles. The root node is 'Lakireddy Ball ready college of engineering', which branches into 'CEO', 'CFO', 'COO', 'owner', 'employer', and 'worker'. Each role node has 'Edit | Del | Assign' options. A 'Show in tree view' button is visible in the top right of the hierarchy area. The system status bar at the bottom right indicates it's 21:39 on 28-11-2024.

## 8. Users

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar has a 'Users' section selected under 'User Management Settings'. The main content area is titled 'All Users' and displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table includes rows for various users like Chatter\_Expert, rra, ram\_ram, Teemara\_Sai, User\_Integration, User\_Security, and y\_viky, each with their respective details and profile status.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Expert	Chatter	chatty.00dm00000ekcdjuar.m2n23ewqen@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	rra	rra	salleemara@789gmail.com	worker	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	ram_ram	ram	salleemara@456@gmail.com	employee	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Teemara_Sai	STteam	salleemara@gmail.com	System Administrator	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User_Integration	Integ	Integration@00ddm00000ekcdjuar.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	Insightssecurity@00ddm00000ekcdjuar.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>	y_viky	YV	salleemara@123@gmail.com	owner	<input checked="" type="checkbox"/>	owner

## 9. Permission sets

“ public read-only” for rice mill1 and supplier1 object.

The screenshot shows the Salesforce Setup interface for 'Sharing Settings'. The left sidebar has a 'Sharing Settings' section selected under 'Security'. The main content area is titled 'Sharing Settings' and displays a table of sharing rules for various objects. The table includes columns for Object, Rule Type, and Permissions. The 'rice mill1' and 'supplier1' objects are highlighted in blue, indicating they have been selected or modified. Other objects listed include User Provisioning Request, Waitlist, Web Cart Document, Work Order, Work Plan, Work Plan Template, Work Step Template, Work Type, Work Type Group, consumer, consumer1, Payment, rice details, rice details1, rice mill, and Student.

Object	Rule Type	Permissions
User Provisioning Request		Private
Waitlist		Private
Web Cart Document		Private
Work Order		Private
Work Plan		Private
Work Plan Template		Private
Work Step Template		Private
Work Type		Private
Work Type Group		Public Read/Write
consumer		Controlled by Parent
consumer1		Controlled by Parent
Payment		Public Read/Write
rice details		Controlled by Parent
rice details1		Controlled by Parent
rice mill		Public Read/Write
rice mill1		Public Read Only
Student		Public Read/Write
supplier		Public Read/Write
supplier1		Public Read Only

## 10. Create Report

create the latest “10” records in consumer objects.

The screenshot shows the Salesforce Report Builder interface. The report title is "rice mill1s with consumer1s". The report preview shows 10 rows of data with columns: rice mill1: rice mill1 Name, consumer1: consumer1 Name, Amount Paid, Consumer Name, Rice type, rice price/kg, Mode of payment, and email. The data includes various consumers like consumers-001 to consumers-008 and their respective details. The interface includes a sidebar for fields, filters, and a preview message. The system status bar at the bottom shows it's 28-11-2024, 18:54, with a temperature of 27°C and weather as party cloudy.

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

The screenshot shows the Salesforce Reports page. The report titled "range of amount per day" is listed under the "All Reports" section. The report description is "estimated rice per day" and it was created by "Sai Teemara" on "28/11/2024, 6:56 pm". The interface includes a sidebar for reports, folders, and favorites. The system status bar at the bottom shows it's 28-11-2024, 19:23, with a temperature of 26°C and weather as haze.

# Create a report folder

The screenshot shows the Salesforce Lightning interface with the following details:

- Header:** All Reports | Reports | Salesforce, All Folders | Reports | Salesforce, Student - Skill Wallet, (123) how to create records in...
- Page:** Reports - All Folders
- Left Sidebar:**
  - REPORTS
    - Recent
    - Created by Me
    - Private Reports
    - Public Reports
    - All Reports
  - FOLDERS
    - All Folders
    - Created by Me
    - Shared with Me
  - FAVORITES
    - All Favorites
- Table:** A list of reports and folders. The table has columns: Name, Created By, Created On, Last Modified By, and Last Modified Date.
- Actions:** Search all folders..., New Report, New Folder.
- Bottom:** System tray showing weather (26°C Haze), search bar, taskbar icons, and system status (ENG IN, 28-11-2024, 19:24).

The screenshot shows the Salesforce Lightning interface with the following details:

- Header:** range of amount per day | Sales, Student - Skill Wallet
- Page:** Report: rice mills with consumers
- Table:** A detailed report table titled "range of amount per day". The table includes columns: Rice taken by shops, rice mill1: rice mill1 Name, consumer1: consumer1 Name, Amount Paid, Consumer Name, Rice type, rice price/kg, Mode of payment, and email.
- Data:** The table displays multiple rows of data, each representing a transaction between a rice mill and a consumer. Subtotals are shown for groups of transactions.
- Actions:** Enable Field Editing, Add Chart, Edit.
- Bottom:** System tray showing weather (25°C Haze), search bar, taskbar icons, and system status (ENG IN, 28-11-2024, 20:55).

The screenshot shows the Salesforce Lightning interface. A modal window titled "Move range of amount per day" is open, displaying a list of "All Folders". The folder "All Folders" is selected. In the background, the "All Reports" page is visible, showing various reports like "range of amount per day", "Program Overview by User", and "Sample Flow Report: Screen Flows". On the right side of the screen, a sidebar shows a list of recent items, including "Einstein Bot Reports" and "Enablement Dashboard Reports". The bottom of the screen shows the Windows taskbar with icons for various applications.

## 11. Create Dashboard Folder

The screenshot shows the Salesforce Lightning interface. A dashboard is displayed with the title "Report: rice mill1s with consumer1s range of amount per day". The dashboard features a horizontal bar chart titled "Sum of Amount Paid" showing data for various consumer IDs (10, 12, 14, 15, 17, 19, 22). Below the chart is a data grid with columns including "Rice taken by shops", "rice mill1: rice mill1 Name", "consumer1: consumer1 Name", "Amount Paid", "Consumer Name", "Rice type", "rice price/kg", "Mode of payment", and "email". The data grid shows entries for consumers 001 and 003 across different rice types and payment modes. The bottom of the screen shows the Windows taskbar with icons for various applications.

## 12. Create Dashboard

The screenshot shows the Salesforce Lightning interface with a dashboard titled "estimated data". A modal window titled "Add Widget" is open, displaying a report titled "range of amount per day". The report preview shows a table with columns: rice mill1: rice mill1 Name, consumer1: consumer1 Name, Amount Paid, Consumer Name, and Rice type. The data in the table is as follows:

rice mill1: rice mill1 Name	consumer1: consumer1 Name	Amount Paid	Consumer Name	Rice type
rice-001	consumers-001	500.00	Sai Teemara	1.basmati
rice-001	consumers-002	750.00	chandu y	2.normal rice
rice-001	consumers-003	600.00	vamc t	1.basmati
rice-001	consumers-004	700.00	pavan b	2.normal rice

At the bottom right of the modal are "Cancel" and "Add" buttons.

The screenshot shows the same Salesforce Lightning interface after the dashboard has been updated. The "range of amount per day" report is now displayed as a standard table within the dashboard area, enclosed in a blue border. The data in the table is identical to the one shown in the previous screenshot.

