

A CRM Application for Wholesale Rice Mill

INTRODUCTION

The Rice Mill CRM Application is designed to enhance the operational efficiency and customer relationship management within a rice mill. By leveraging Salesforce's powerful CRM capabilities, the application provides a comprehensive solution to streamline daily operations, generate insightful reports, and optimize resource allocation. This project focuses on developing a user-friendly and feature-rich application tailored to the specific needs of a rice mill factory.

PRE-REQUISITES

1. Salesforce Developer account
2. Knowledge of Salesforce admin concepts
3. Two web browsers installed on the machine
4. Good internet connectivity

FEATURES AND FUNCTIONALITY

The application generates detailed reports and analytics on:

- Daily rice sales
- Total income per day
- Revenue generated
- Popular rice types
- Most frequent customers

These reports are essential for the owner to make informed decisions about resource allocation and future planning. The dashboards provide a visual representation of the data, making it easy to understand and analyse key metrics at a glance.

OBJECT & RELATIONSHIP IN SALESFORCE

Objects in Salesforce are database tables that store data. There are two types of objects: standard objects (e.g., Accounts, Contacts) and custom objects created to meet specific

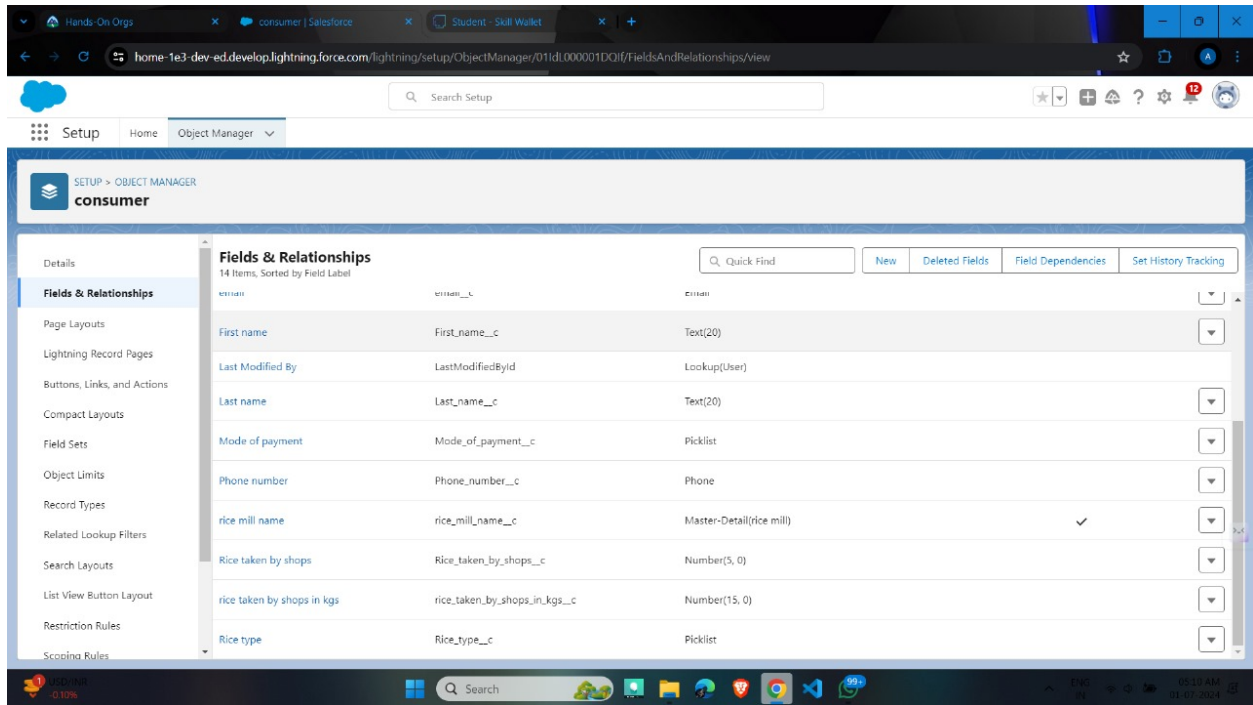
business needs. Relationships between objects can be established using lookup relationships or master-detail relationships.

Types of Relationships:

- **Lookup Relationship:** A loose coupling between two objects. Each record in the child object has a link to a single record in the parent object.
- **Master-Detail Relationship:** A tight coupling where the child record inherits security and ownership from the parent record. Deleting the parent record also deletes the child records.

The screenshot shows the Salesforce Setup interface for the 'supplier' object. The 'Fields & Relationships' section is active, displaying a list of 6 items sorted by Field Label. The table below summarizes the fields shown in the screenshot.

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 details)		
sum of rice distributed	sum_of_rice_distributed__c	Roll-Up Summary (SUM rice details)		
supplier Name	Name	Text(80)		✓

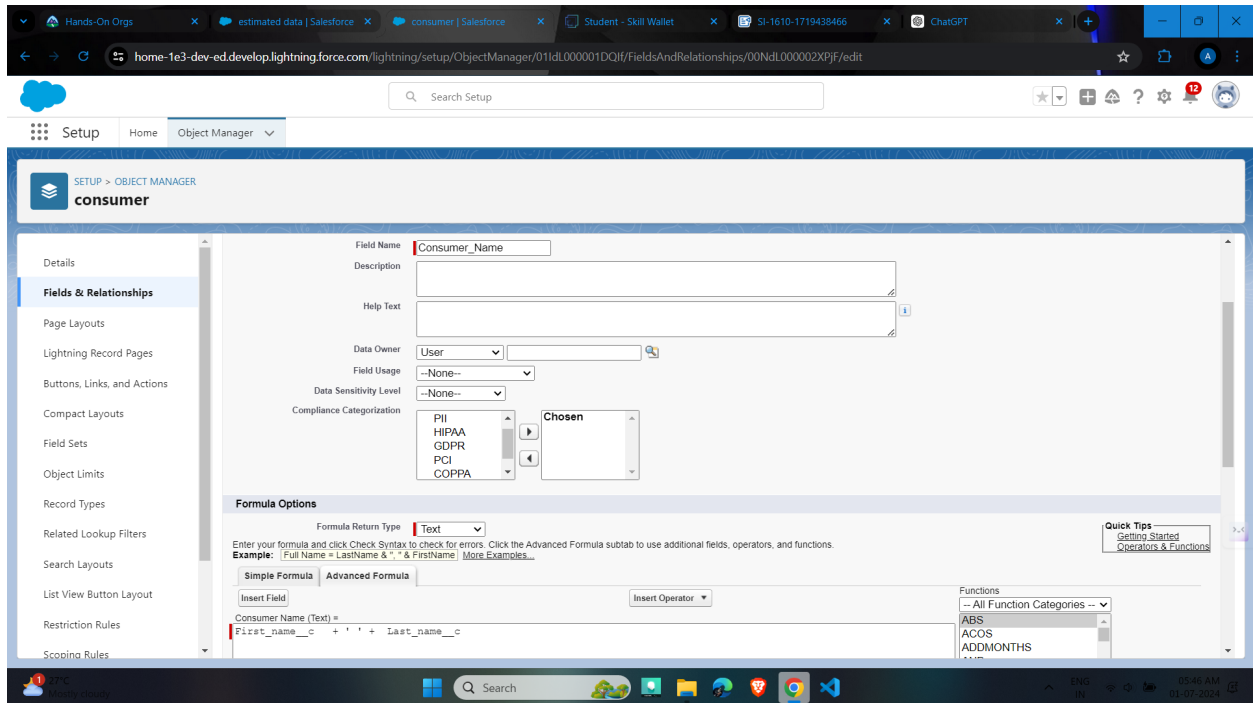


FORMULA FIELDS AND VALIDATION RULES

Formula fields automatically calculate values based on other fields. They are used for real-time data computation without manual intervention.

Examples:

- **Formula Field:** Calculate the total price by multiplying the quantity by the unit price.
- **Validation Rule:** Ensure that the discount percentage does not exceed a certain value using logical operators and functions.

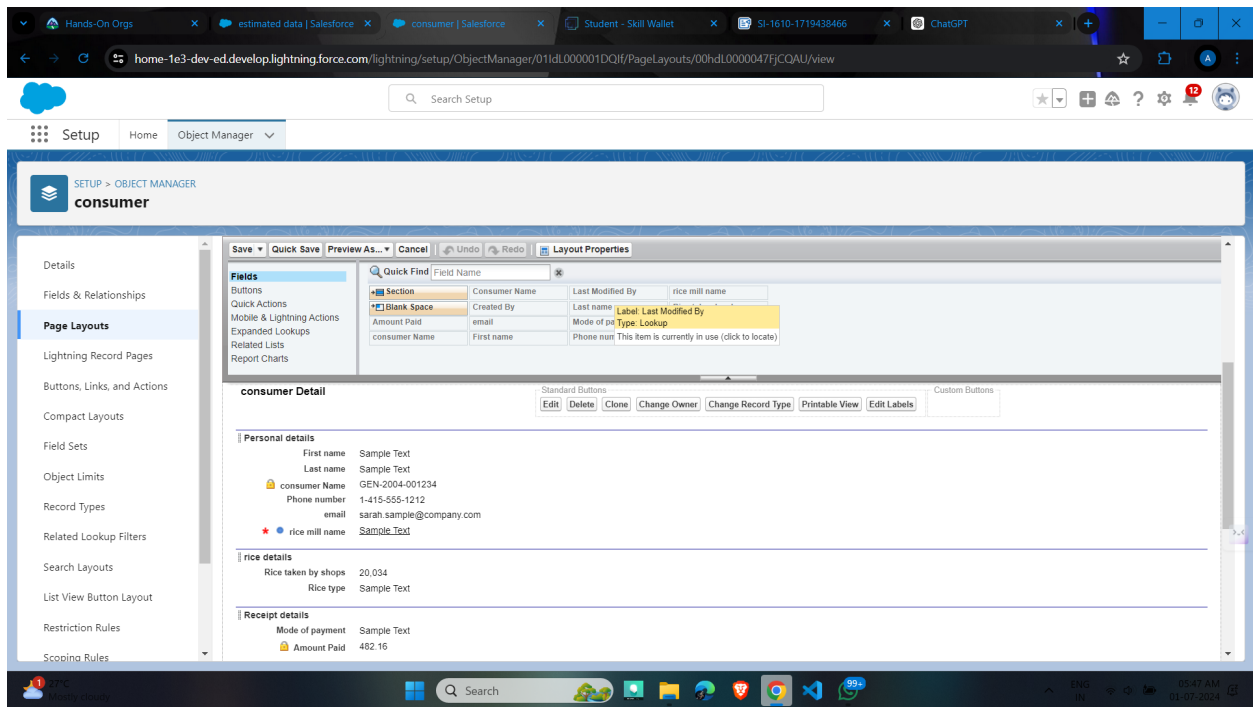


Page Layouts

Page layouts control the organization and visibility of fields, related lists, and other user interface components on record pages. Customizing page layouts helps tailor the user experience to specific roles, ensuring relevant information is easily accessible.

Customization Examples:

- Rearrange fields to prioritise the most important information.
- Add or remove related lists based on user needs.



Reports and Dashboards

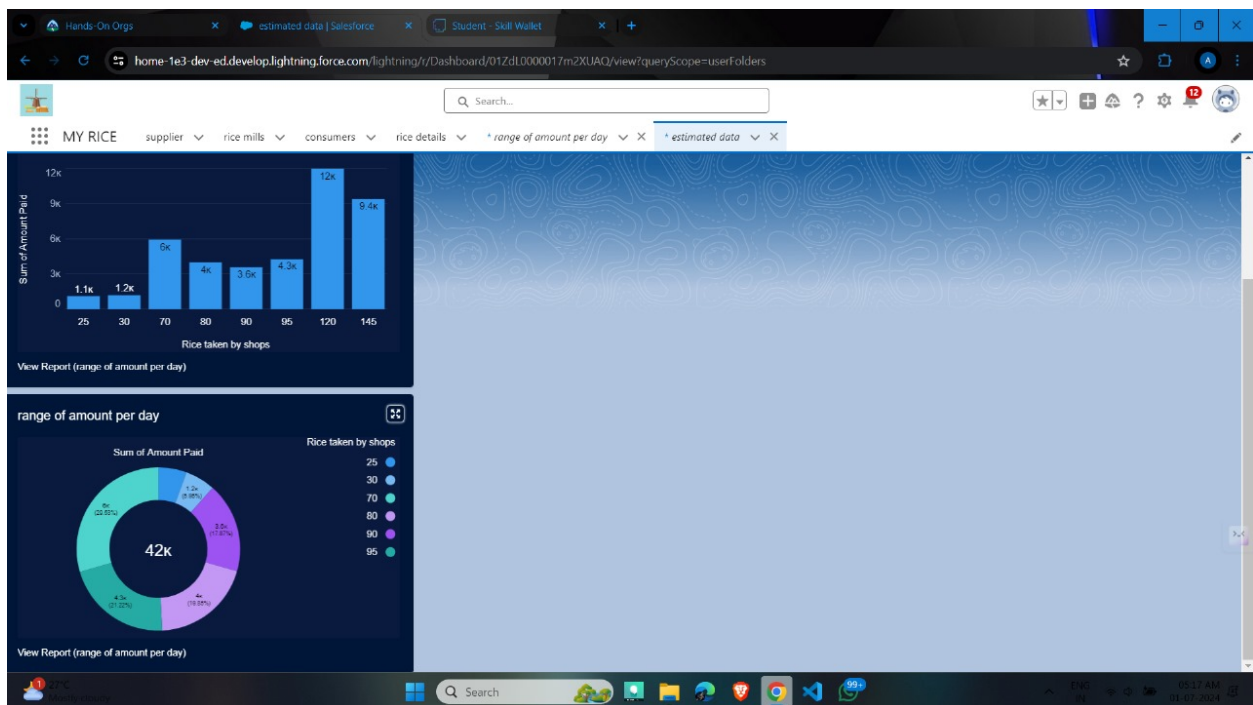
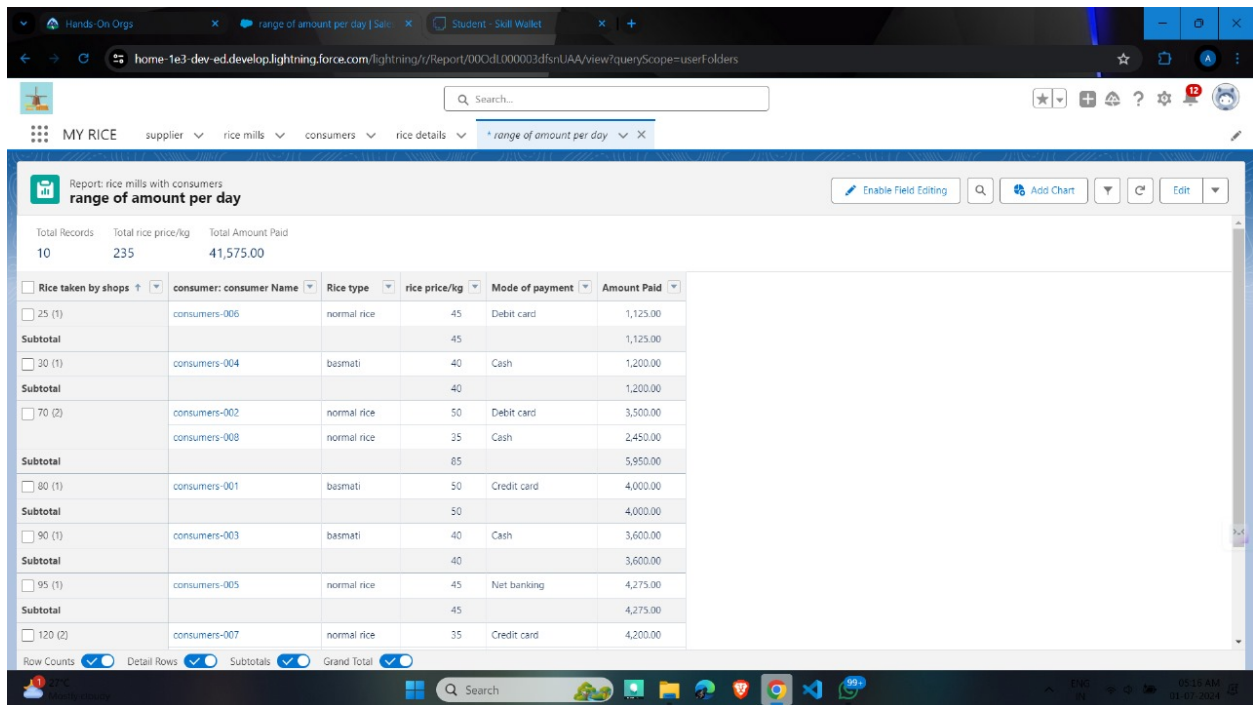
Reports in Salesforce generate detailed and customizable data summaries. Dashboards provide visual representations of these reports, offering insights at a glance. Together, they enable data-driven decision-making by presenting key metrics and trends clearly and concisely.

Types of Reports:

- **Tabular Reports:** Simple lists of records.
- **Summary Reports:** Group records and provide subtotals.
- **Matrix Reports:** Group records by rows and columns.
- **Joined Reports:** Combine multiple report types to compare data.

Dashboard Components:

- **Charts:** Visualize data in various formats (bar, pie, line).
- **Gauges:** Show progress towards a goal.
- **Tables:** Display data in tabular format.
- **Metrics:** Highlight key numbers.

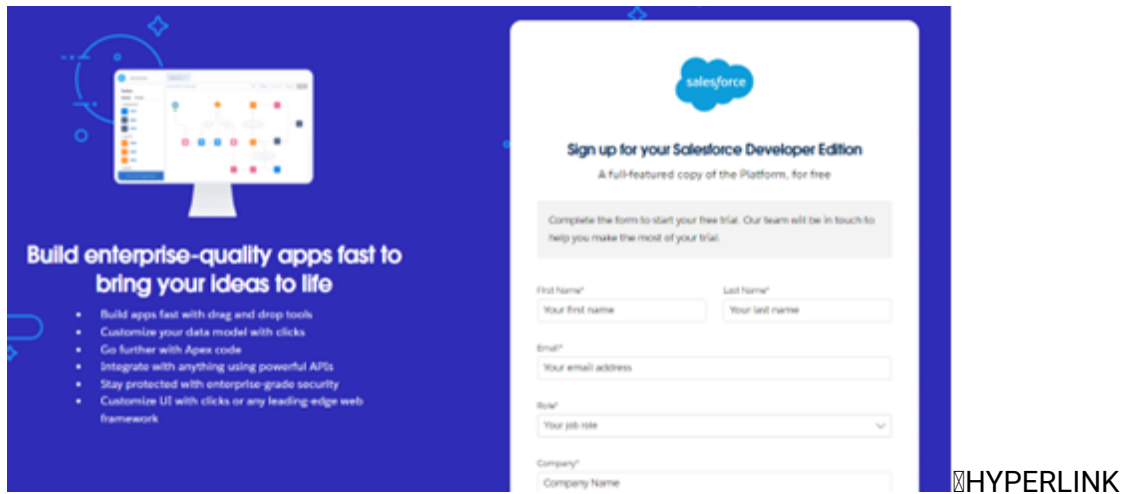


STEPS

Activity 1: Creating Developer Account:

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :



["https://developers.salesforce.com/Signup*"](https://developers.salesforce.com/Signup*)

1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

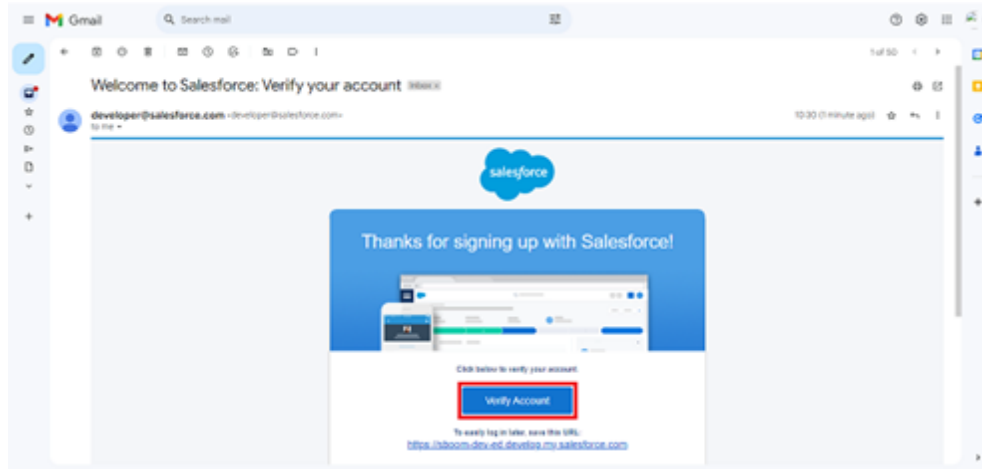
This need not be an actual email id, you can give anything in the format :

username@organization.com

Click on sign me up after filling these.

Activity 2: Account Activation:

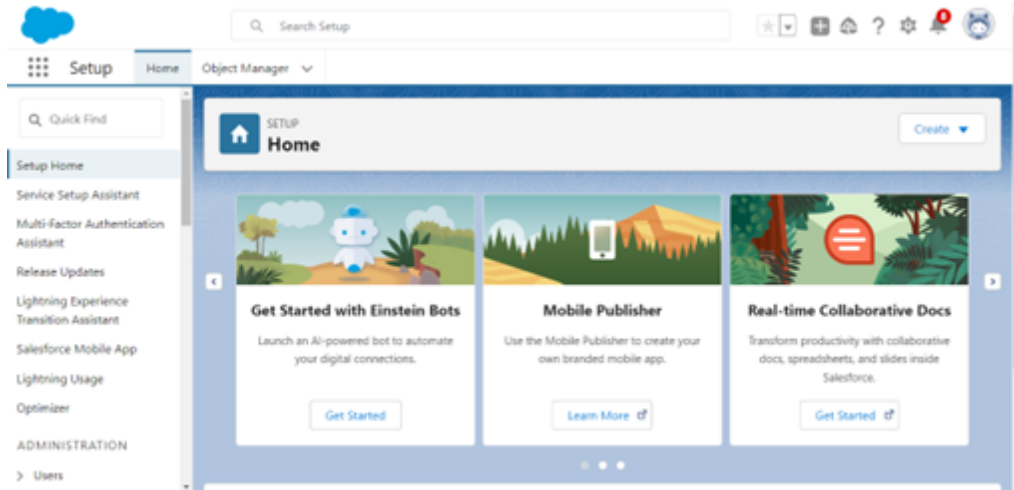
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

A screenshot of the 'Change Your Password' page. The title is 'Change Your Password'. Below it, it says 'Enter a new password for lead@sb.com. Make sure to include at least:'. There are three green checkmarks indicating requirements: '8 characters', '1 letter', and '1 number'. Below these are four input fields: 'New Password' (with a 'Good' status), 'Confirm New Password' (with a 'Match' status), 'Security Question' (with a dropdown menu showing 'In what city were you born?'), and 'Answer' (with the text 'asdfghjkl'). A red rectangular box highlights the 'New Password', 'Confirm New Password', 'Security Question', and 'Answer' fields. At the bottom, there is a blue button labeled 'Change Password' which is highlighted with a blue rectangular box.

4. Then you will redirect to your salesforce setup page.



Milestone 2- Object

What Is an Object?

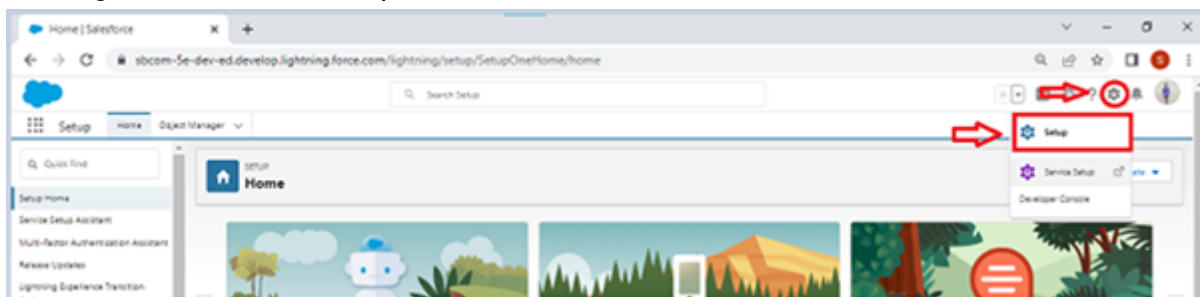
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

Salesforce objects are of two types:

1. **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

To Navigate to Setup page:

Click on gear icon → click setup.

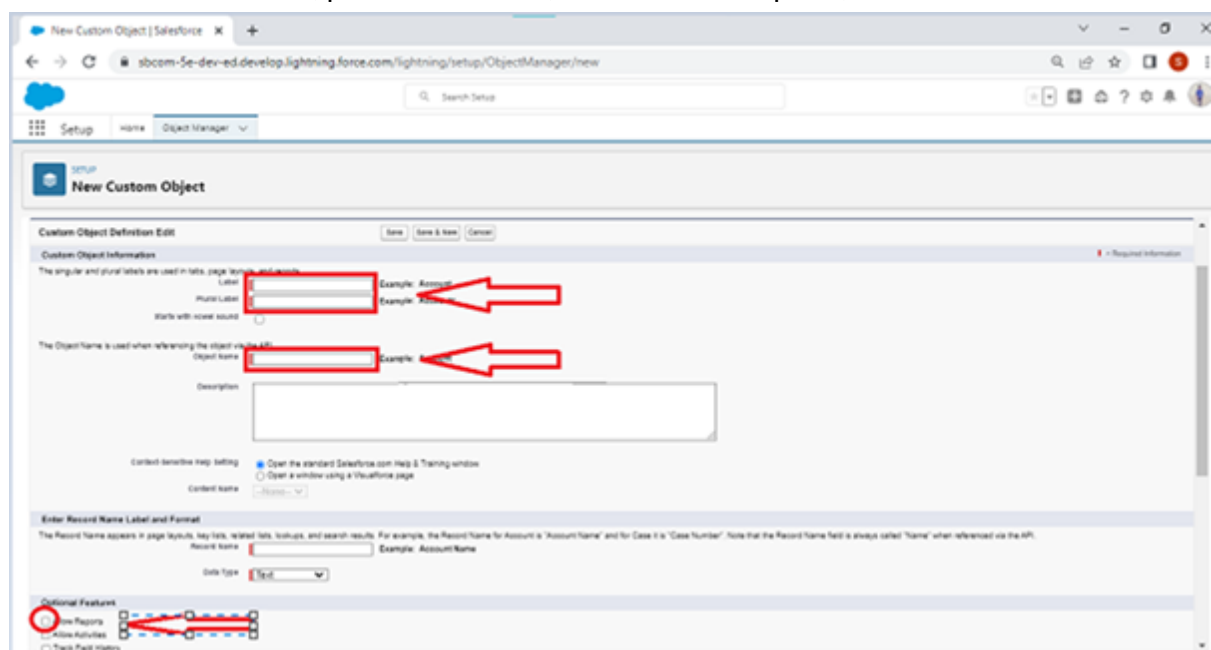


To create an object:

1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.



2. On Custom object defining page:
3. Enter the label name, plural label name, click on Allow reports, Allow search.



4. Click on Save.

Activity 1: Create Supplier Object:

To create an object:

1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
1. Enter the label name → **supplier**
2. Plural label name → supplier
3. Enter Record Name Label and Format
 - Record Name → supplier Name
 - Data Type → Text
2. Click on Allow reports and Track Field History and allow search
3. Allow search → **Save**.

Activity 2: Create Rice mill Object:

To create an object:

1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
1. Enter the label name → rice mill
2. Plural label name → rice mills
3. Enter Record Name Label and Format
 - Record Name →
 - Data Type → Auto Number
 - Display Format → rice-{000}
 - Starting number → 1
2. Click on Allow reports and Track Field History, Allow Search.
3. Allow search → **Save**.

Activity 3: Create consumer Objects:

Note: Follow the same steps as mentioned in Activity 2 for the and Receipt objects.

1. Use these display format for the **consumer**
 - label name → **consumer**
 - Plural label name → **consumers**
 - Display Format → **consumers-{000}**
 - Starting number → 1

Activity 4: Create rice details Objects: —

2. Use these display format for the rice details

- label name → rice details
- Plural label name → rice details
- Display Format → rice-{000}
- Starting number → 1

Milestone 3- Tabs

What is Tab : A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Types of Tabs:

1. Custom Tabs

Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

2. Web Tabs Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.

1. Visual force Tabs

Visual force Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

2. Lightning Component Tabs

Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

3. Lightning Page Tabs

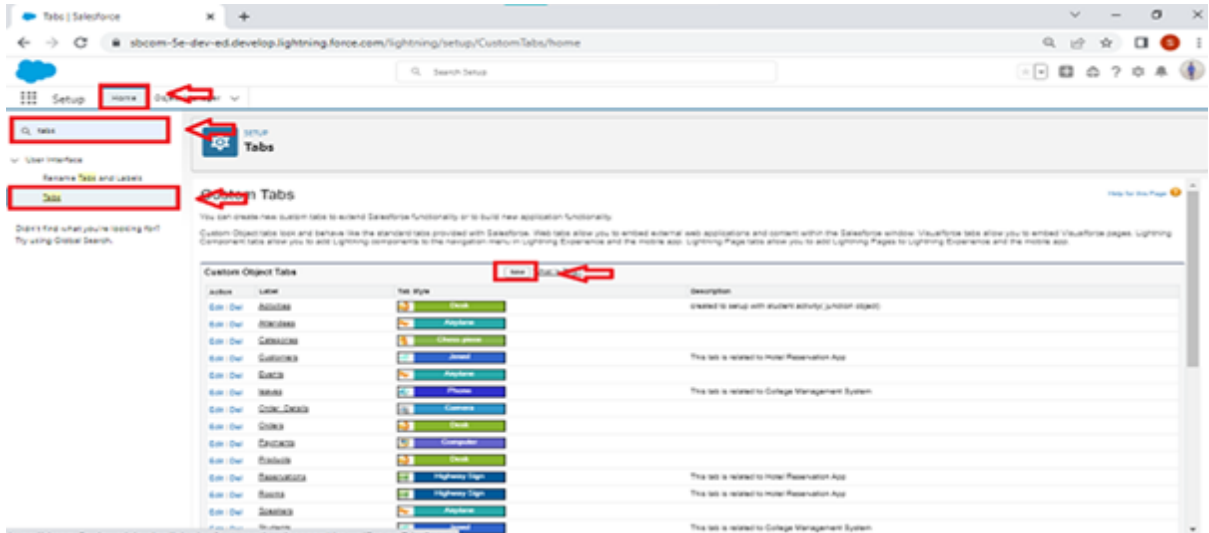
Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

Activity 1: Creating a Custom Tab

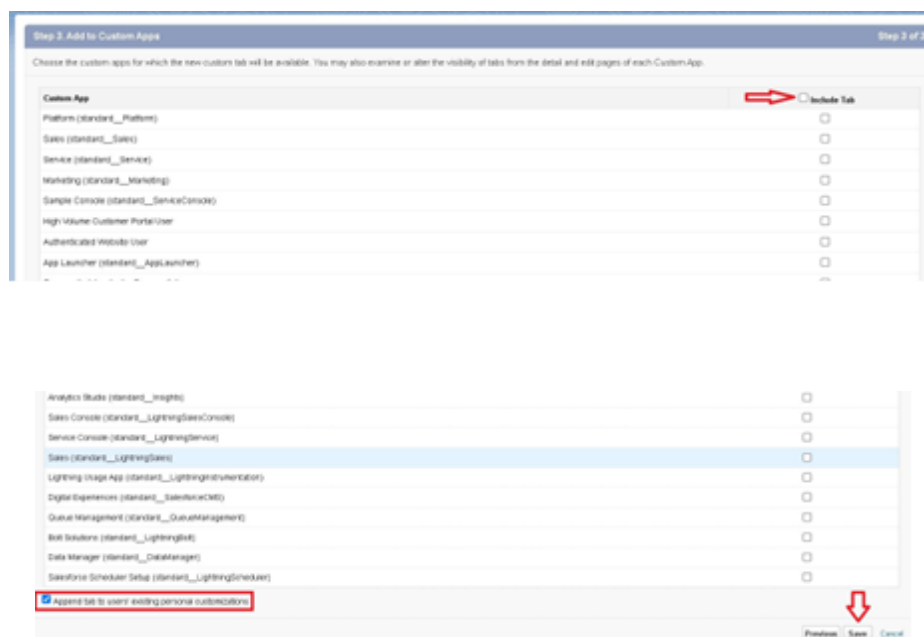
To create a Tab:(supplier)

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)



2. Select Object(supplier) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.

The screenshot shows the 'Edit Custom Object Tab' page for 'suppliers'. The page has a header 'SETUP Tabs' and a sub-header 'Edit Custom Object Tab suppliers'. Below the sub-header, there is a section 'Custom Tab Definition Edit'. Inside this section, there is a 'Custom Object Tab Information' section with the following fields: Tab Label (suppliers), Object (SUPPLIER), and Tab Style (None). Below these fields, there is a section '(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab' with a dropdown menu set to 'None'. Below this, there is a 'Description' field with a text area. At the bottom of the page, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted.



Activity 2: Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “rice mill, **consumer** , rice details”.
2. Follow the same steps as mentioned in Activity -1 .

Milestone 4- The Lightning App:

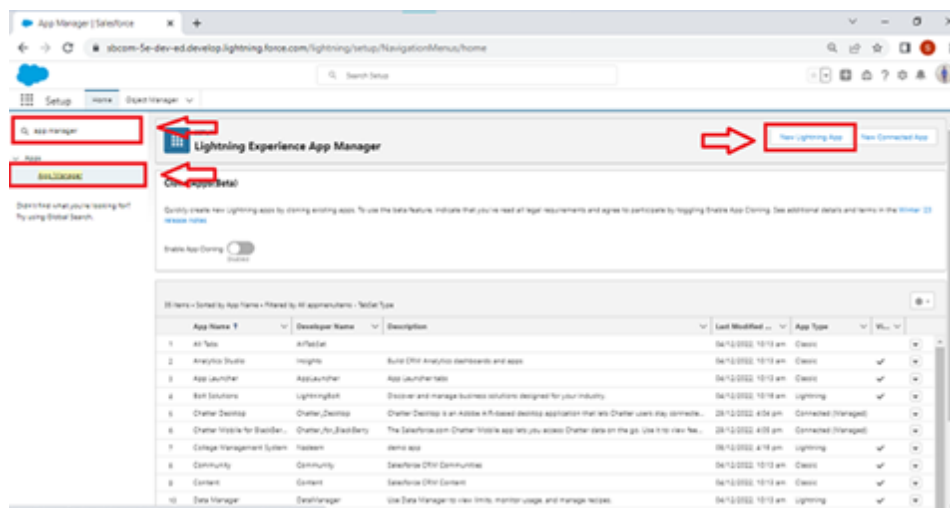
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom colour and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

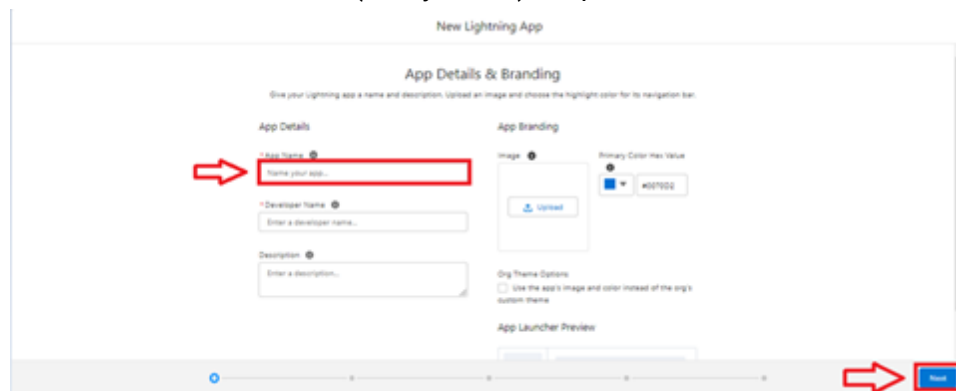
Activity 1: Create a Lightning App

To create a lightning app page:

1. Go to setup page → search “app manager” in quick find → select “app manager” → click on New lightning App.

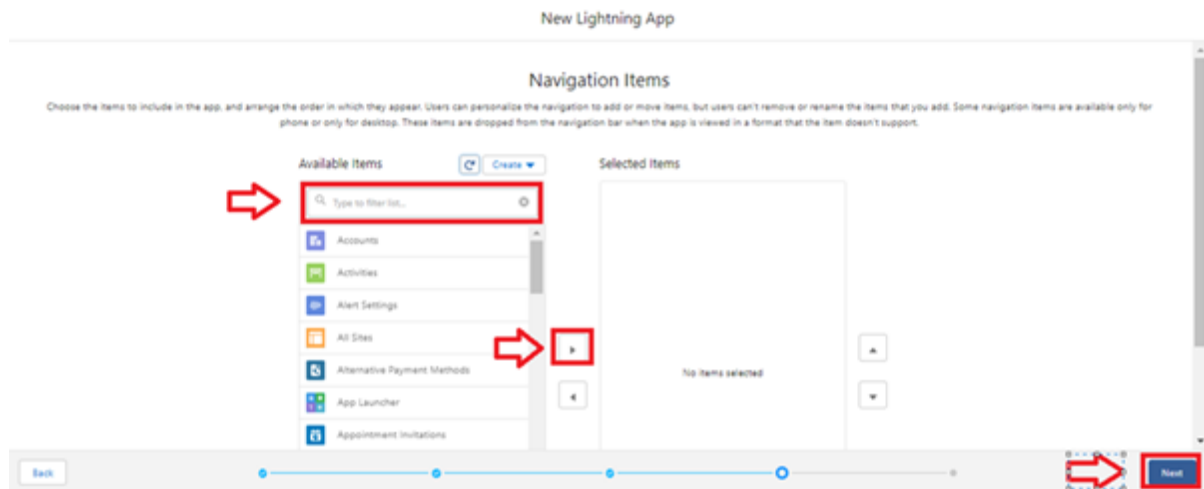


2. Fill the app name in app details as MY RICE → Next → (App option page) keep it as default → Next → (Utility Items) keep it as default → Next.



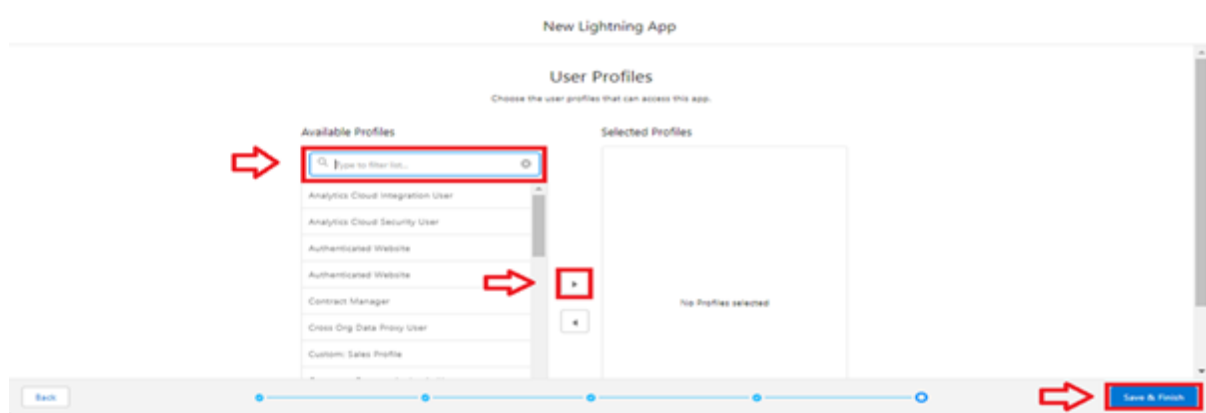
3. Upload a photo that is related to your app.

4. To Add Navigation Items:



Select the items (supplier, rice mill, consumer , Rice details) from the search bar and move it using the arrow button → Next.

5. To Add User Profiles:



Search profiles (System administrator) in the search bar → click on the arrow button → save & finish.

Milestone 5 : Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

- Created By
- Owner
- Last Modified
- Field Made During object Creation

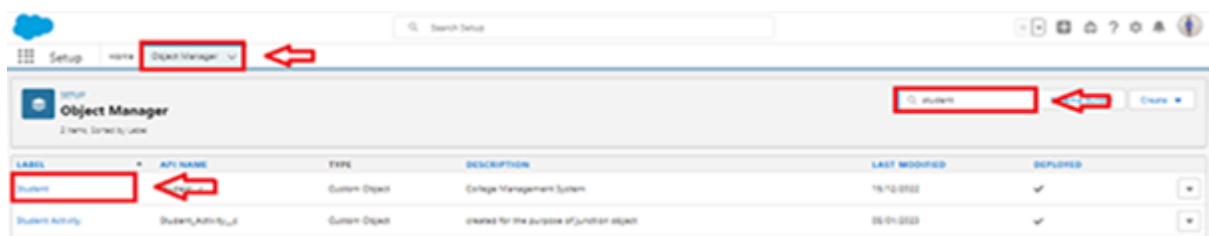
Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

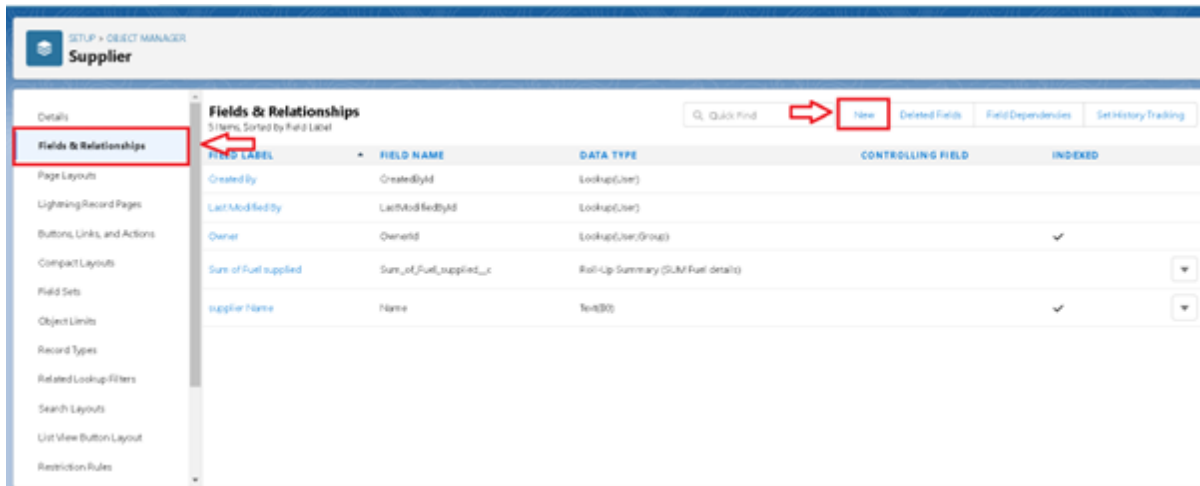
Activity 1: Creating the number field in rice details object

Creating the number field in rice details object

1. Go to the setup page → click on object manager → From drop down click edit for rice details object.



2. Click on fields & relationship → click on New.



3. Select Data type as "Number" and click Next.

4. Given the Field Label as "rice distributed " and length as " 5 ".

Step 2: Enter the details

Field Label:

Please enter the length of the number and the number of decimal places. For example, a number with a length of 6 and 2 decimal places can accept values up to "12345678.90".

Length: Decimal Places:

Field Name:

Description:

Help Text:

Required: ☐ Always require a value in this field in order to save a record

Unique: ☐ Do not allow duplicate values

External ID: ☐ Set this field as the unique record identifier from an external system

AI Prediction: ☐ Use this field to store AI prediction scores

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

Previous Next Cancel

5. Field Name will be auto populated, and click on Next → Next → Save.

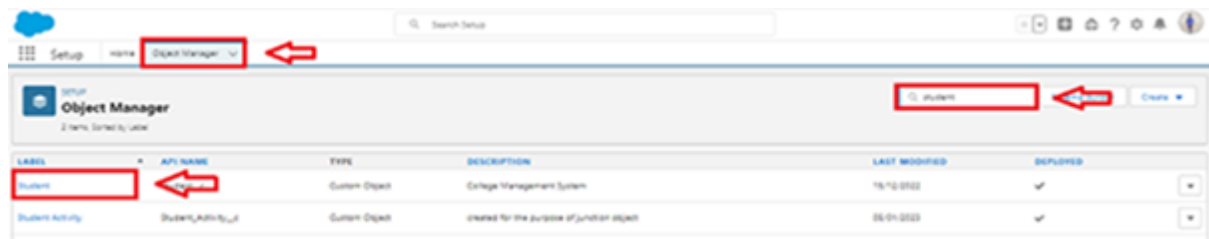
Activity 2 : Creating Junction Object :

A Junction object is a custom object that serves as a bridge between two related objects in a many-to-many relationship. It allows you to create a relationship between records of two different objects by creating a many-to-many relationship model.

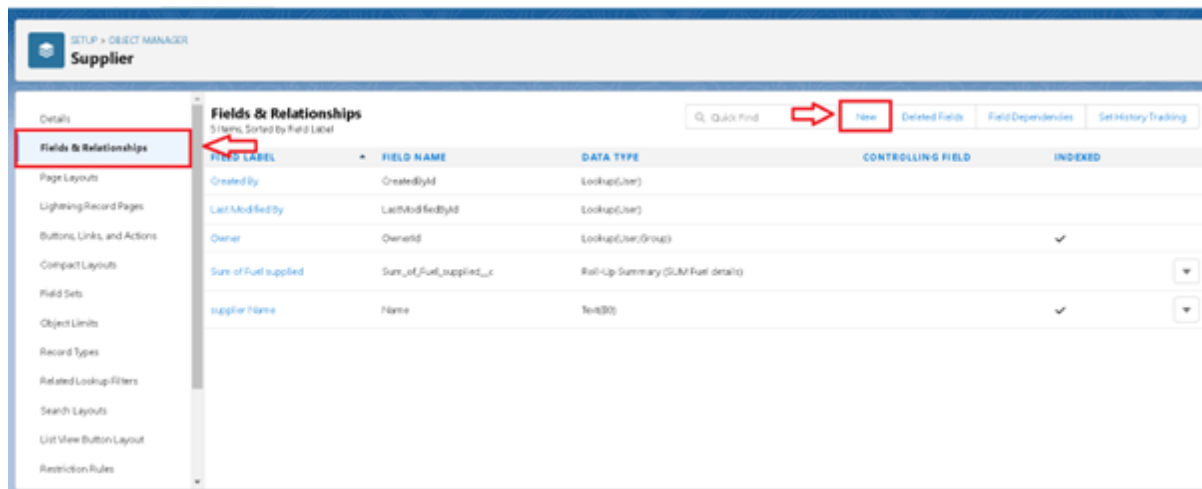
Creating junction object as rice details with supplier & rice mill

To create junction object

1. Go to the setup page → click on object manager → From drop down click edit for rice details object.



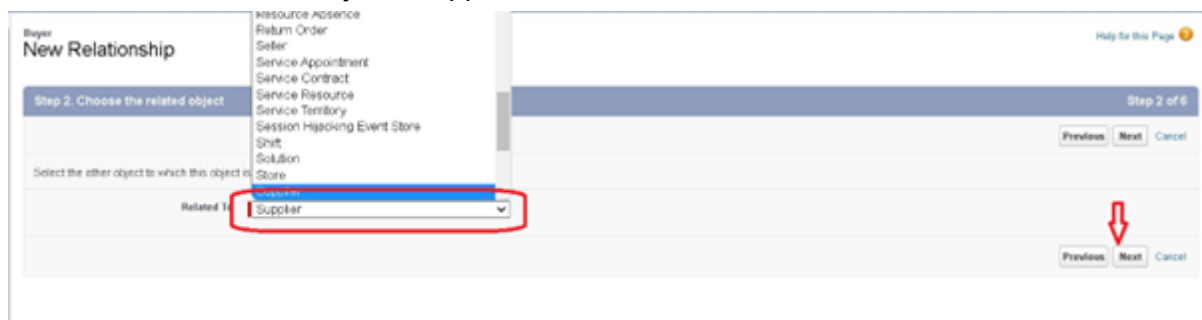
2. Click on fields & relationship → click on New.



3. Select "Master-Detail relationship" as data type and click Next.



4. Select the related object "supplier" and click next.



5. Give Field Label as "supplier Name" and click Next.
6. Next → Next → Save & New.
7. Follow the same steps from 1 to 3.
8. Select the related object "rice mill" and click Next.
9. Give Field Label as "rice mill 1(one)" and click Next.
10. Next → Next → Save.

Activity 3 : Creating a Master-Detail Relationship

master-detail relationship is a type of relationship between two objects where the master object controls certain behaviours and settings of the detail object. Here are a few use cases that demonstrate the use of master-detail relationships

Creating Master-Detail Relationship between consumer & rice mill Object

To Create a Master-Detail relationship

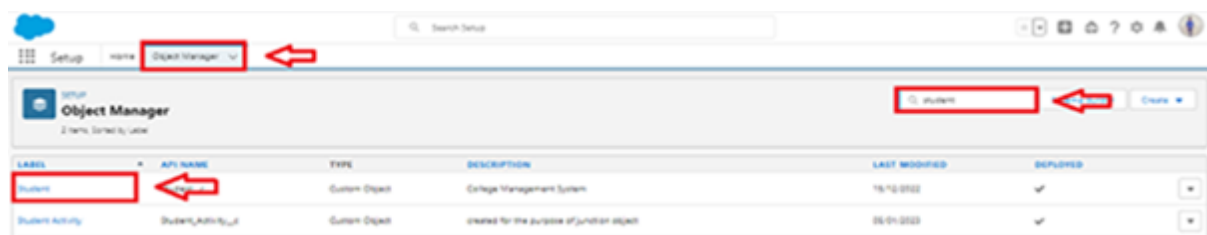
1. Go to the setup page → click on object manager → From drop down click edit for consumer object.
2. Click on fields & relationship → click on New.
3. Select "Master-Detail relationship" as data type and click Next.
4. Select the related object "rice mill".
5. Give Field Label as "rice mill name" and click Next.
6. Next → Next → Save.

Activity 4 : Creating the Roll-up Summary

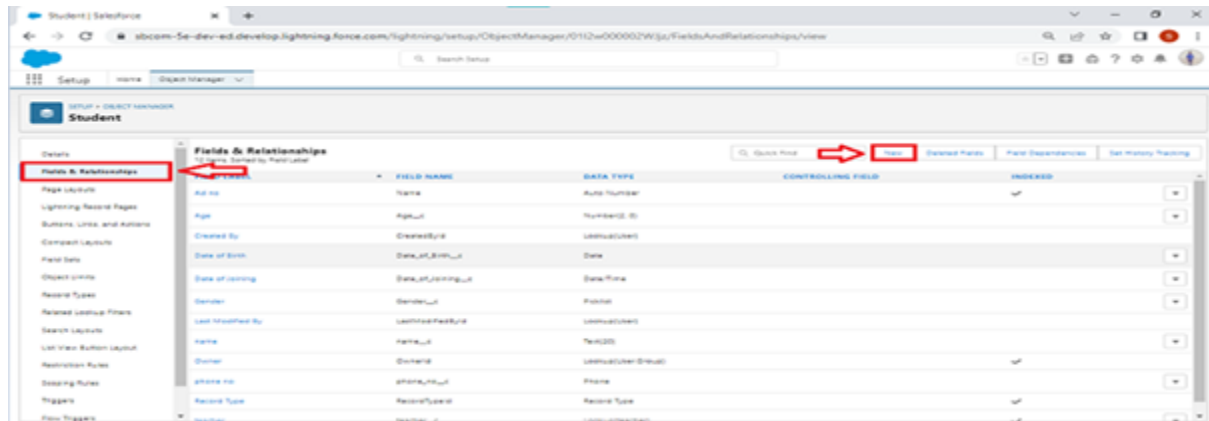
A rollup summary field is a field that summarises data from a child object to a parent object that shares a master-detail relationship. Rollup summary fields can use the COUNT, SUM, MIN, and MAX functions. For example, you could use a rollup summary field to display the total value (amount of rice supplied) from rice details on a related supplier.

Creating the Roll-up summary field on supplier & rice mill Objects.

1. Go to setup → click on Object Manager → type object name(supplier) in search bar → click on the object.



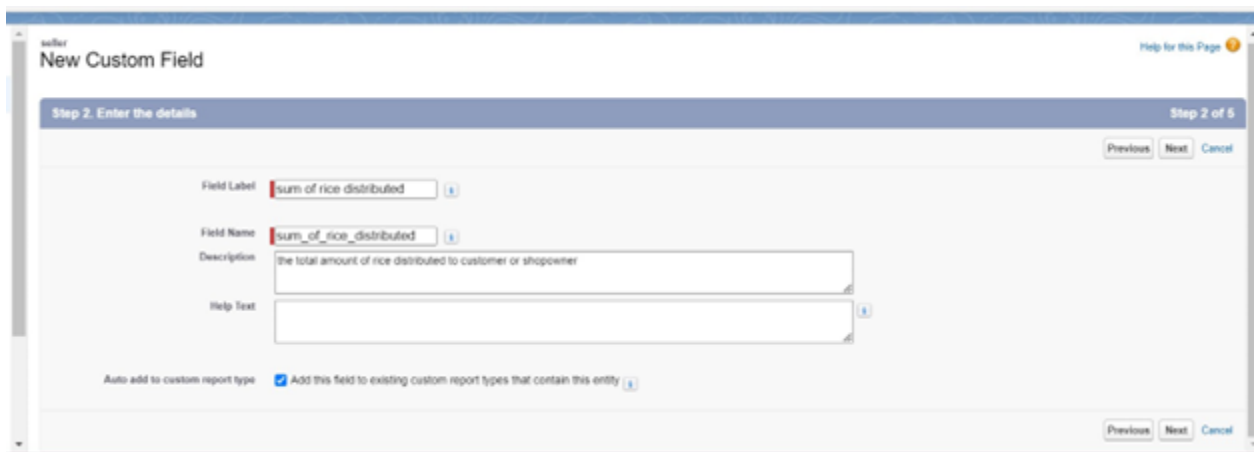
2. Now click on “Fields & Relationships” → New



3. Select the data type as “Rollup summary”, and click Next.



4. Give the Field label as “ sum of rice distributed ”,Field Name will be Auto generated, and click Next.



- 5.
6. Select the summarised object as “ rice details ”.
7. Select the Rollup type as “sum”.
8. Select the field to aggregate as “ rice distributed ”, and click Next → Next → Save.

Step 3. Define the summary calculation Step 3 of 5

Previous Next Cancel

Select Object to Summarize ! Required Information

Master Object: seller

Summarized Object: rice details

Select Roll-Up Type

☐ COUNT

☒ SUM Field to Aggregate: rice distributed

☐ MIN

☐ MAX

Filter Criteria

☒ All records should be included in the calculation

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

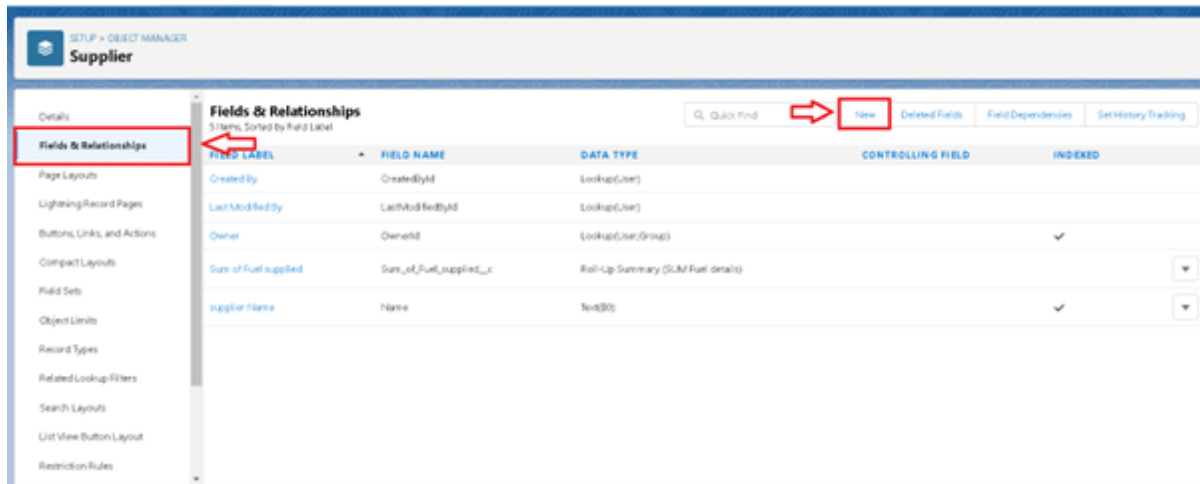
Previous Next Cancel

9. Follow the same steps for the rice mill Object from 1 to 3
10. Give the Field label as "rice distributed to shops", Field Name will be Auto generated, and click Next.
11. Select the summarised object as "rice details".
12. Select the Rollup type as "sum".
13. Select the field to aggregate as "rice distributed", and click Next → Next → Save.
14. **Note** : create the field as "rice taken by shops in kegs" using number datatype in consumer object
15. Follow the same steps for the rice mill Object from 1 to 3
16. Give the Field label as "rice taken", Field Name will be Auto generated, and click Next.
17. Select the summarised object as "consumer".
18. Select the Rollup type as "sum".
19. Select the field to aggregate as "rice taken in shops", and click Next → Next → Save.

Activity 5 : Creating Fields in Objects

Creating the number field in rice details object

6. Go to the setup page → click on object manager → From drop down click edit for rice details object.
7. Click on fields & relationship → click on New.



8. Select Data type as “Number” and click Next.

9. Given the Field Label as “supplier name ” and length as “ 5 ”.

Step 2. Enter the details

Field Label:

Please enter the length of the number and the number of decimal places. For example, a number with a length of 6 and 2 decimal places can accept values up to "12345678.90".

Length: Decimal Places:

Field Name:

Description:

Help Text:

Required: ☐ Always require a value in this field in order to save a record

Unique: ☐ Do not allow duplicate values

External ID: ☐ Set this field as the unique record identifier from an external system

AI Prediction: ☐ Use this field to store AI prediction scores

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

Previous Next Cancel

10. Field Name will be auto populated, and click on Next → Next → Save.

Activity 6: Creating Fields in rice mill Objects

1. Select Data type as “Number” and click Next.

2. Given the Field Label as “rice price/kg ” and length as “ 5 ”

Activity 7: Creating Fields in consumer Objects

S.no	Object name	Fields	data type
1.	consumer	First name	Text
		Last name	Text
		Phone number	phone
		email	email

Activity 8 : Creating Cross Object Formula Field in consumer Object

A cross-object formula field is a formula field that references fields from another object in Salesforce. This type of formula allows users to calculate and display data from multiple objects on a single record.

Note : check whether the fields mentioned in the formula field are created or not , if not go to activity 9 and create those fields mentioned in consumer object.

1. Go to setup → click on Object Manager → type object name(consumer) in search bar → click on the object.
2. Click on fields & relationship → click on New.
3. Select Data type as “Formula” and click Next.
4. Give Field Label and Field Name as “Amount Paid ” and select formula return type as “Number” and click next.

Step 2. Choose output type Step 2 of 5

Field Label Field Name

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

Formula Return Type

☒ None Selected Select one of the data types below:

- ☐ Checkbox Calculate a boolean value.
Example: `TODAY() > CloseDate`
- ☐ Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `(Gross_Margin * Amount - Cost__c)`
- ☐ Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder_Date + CloseDate - 7`
- ☐ Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `Hours_to_Charge + 3`
- ☒ Number Calculate a numeric value.
Example: `Fahrenheit * 1.8 * Celsius__c + 32`
- ☐ Percent Calculate a percent and automatically add the percent sign to the number.
Example: `(Discount * (Amount - Discounted_Amount__c) / Amount)`

Previous **Next** Cancel

5. Insert fields formula should be :

rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c

6. Under Advanced Formula write down the formula and click “Check Syntax” and Save.

Simple Formula | Advanced Formula

Insert Field | Insert Operator

amount paid (Number) =

rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c

Functions

-- All Function Categories --

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

Insert Selected Function

Check Syntax | No syntax errors in merge fields or functions. (Compiled size: 67 characters)

1. Creating the Formula field in consumer Object

Note : check whether that the fields that mentioned in the formula field are created are not , if not go to activity 9 and create that fields mentioned in consumer object

2. Go to setup → click on Object Manager → type object name(consumer) in search bar → click on the object.
3. Click on fields & relationship → click on New.
4. Select Data type as “Formula” and click Next.
5. Give Field Label and Field Name as “Consumer Name” and select formula return type as “TEXT” and click next.
6. Insert field formula should be : First_Name__c + ' ' + Last_Name__c
7. click “Check Syntax” and Save.

8.



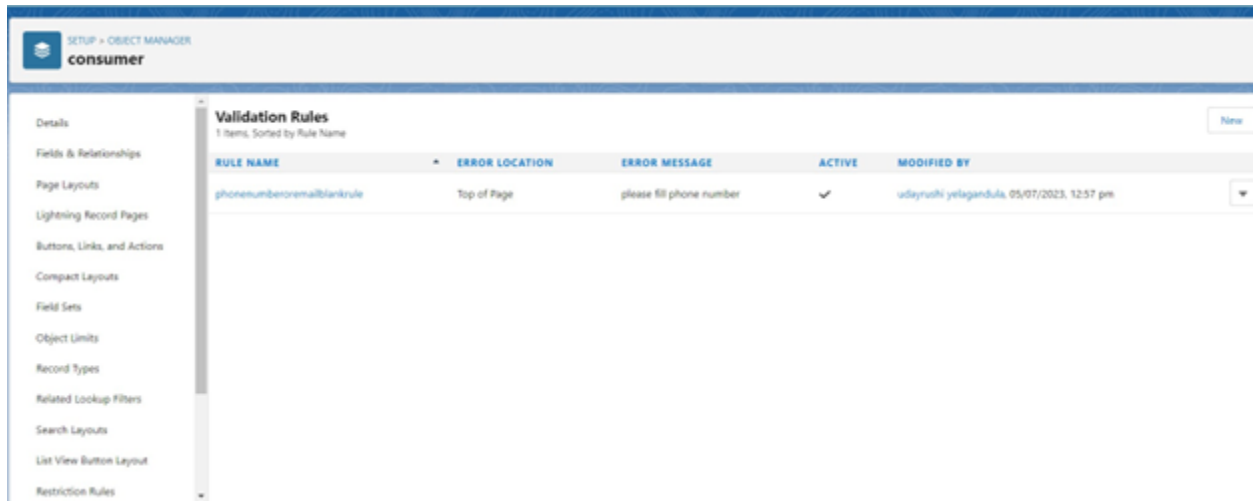
Activity 9 : Creating the validation rule

Improve the quality of your data using validation rules. Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of "True" or "False". Validation rules also include an error message to display to the user when the rule returns a value of "True" due to an invalid value.

Creating the validation rule for phone number field in consumer object

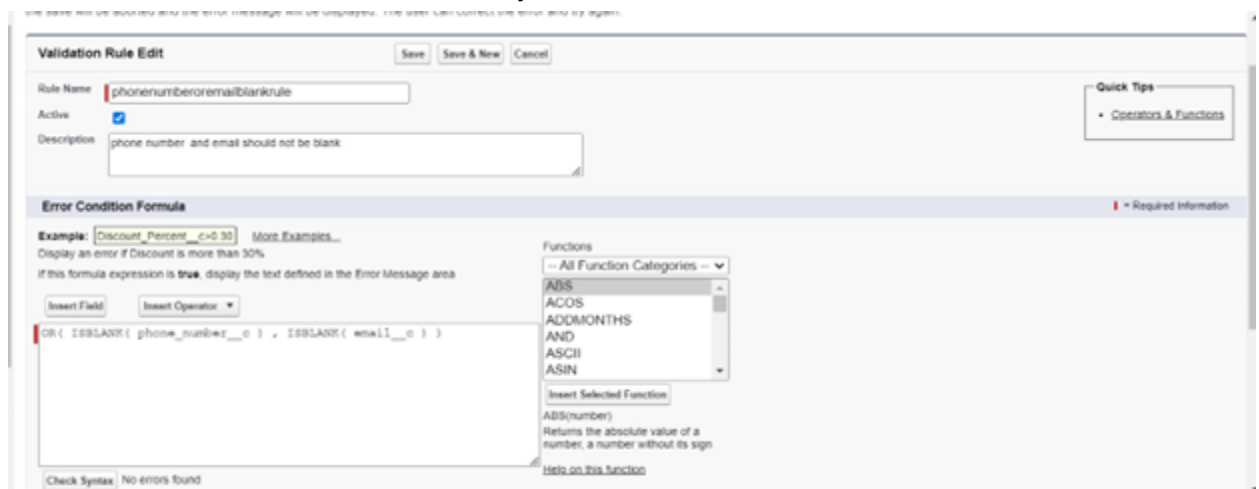
Note : check whether the fields mentioned in the formula field are created or not , if not go to activity 9 and create those fields mentioned in consumer object.

1. Go to the setup page → click on object manager → From drop down click edit for consumer object.
2. Click on the validation rule → click New.



]

3. Enter the Rule name as “Phonenumberemailblankrule”.
4. Enter the description as “phone number and email number should not be blank”.
5. Enter the formula as “ ” and check the syntax.



- 6.
7. Under the error message write as “please fill in your phone number.”
8. Select error location “top of page”.

Insert Field Insert Operator ▼

OR(ISBLANK(phone_number__c) , ISBLANK(email__c))

Check Syntax

ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

ABS(number)
Returns the absolute value of a number, a number without its sign

[Help on this function](#)

Error Message

Example: Discount percent cannot exceed 30%

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

Error Message | please fill phone number

This error message can either appear at the top of the page or below a specific field on the page

Error Location | ☒ Top of Page ☐ Field ⓘ

Save Save & New Cancel

- 9.
10. Save the validation rule.

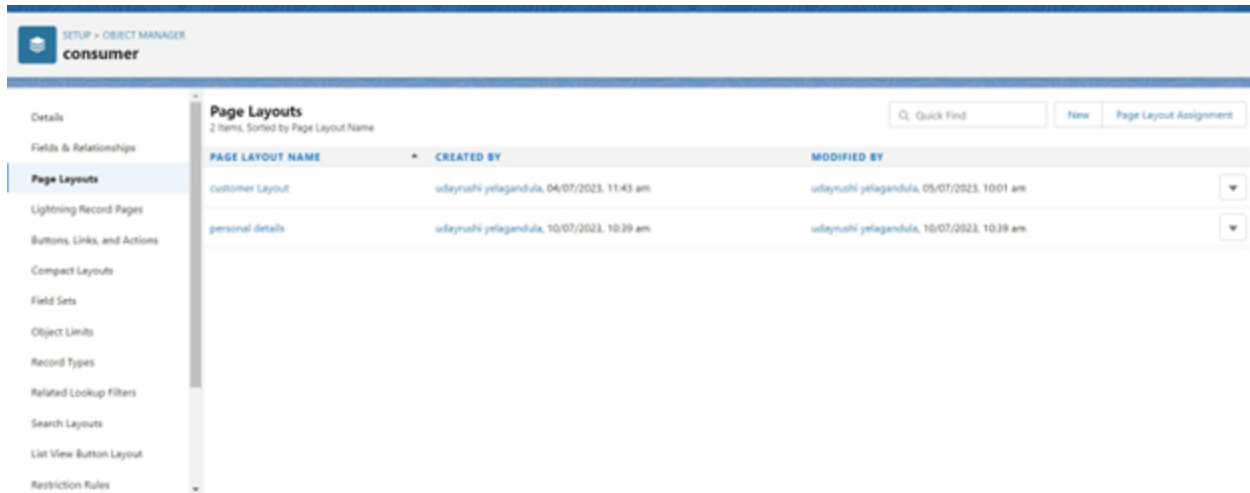
Milestone 6 : Page layouts

Page Layout in Salesforce allows us to customize the design and organize detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

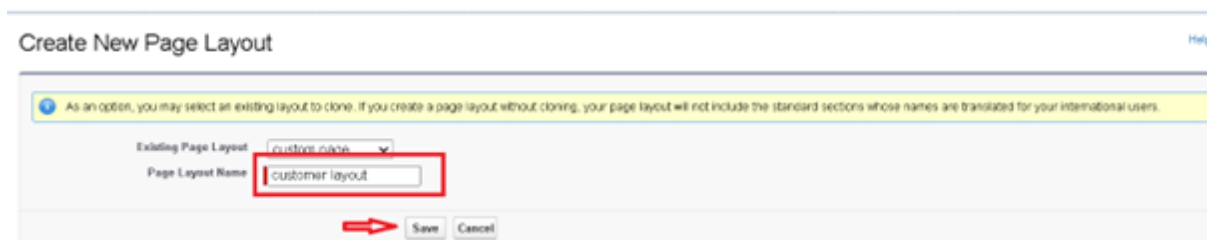
Activity 1 : creating the page layout

To Create a Page layout:

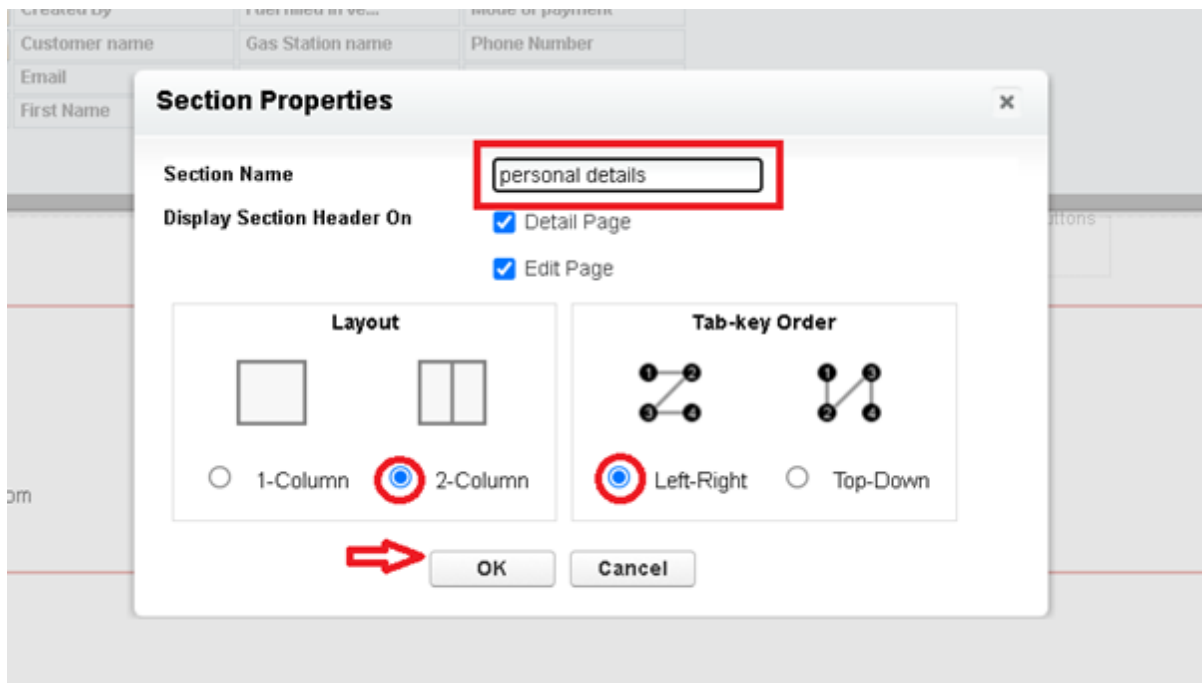
1. Go to Setup → Click on Object Manager → Search for the object (consumer) → From drop down select the object and click on it.
2. Click on Page layout → Click on New.



3. Select the existing page layout, and give the page layout name as “consumer layout”, and click save.

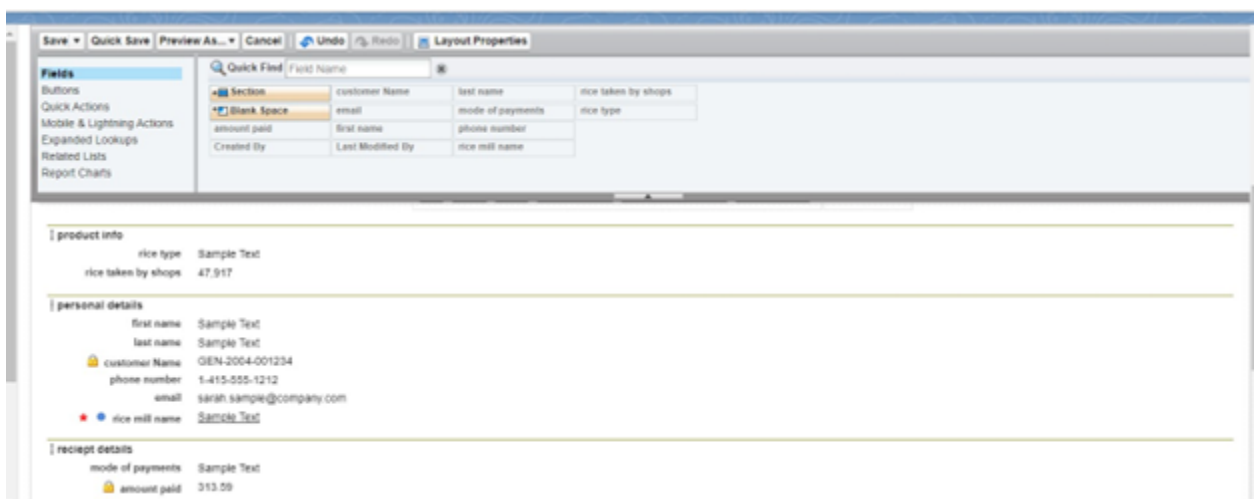


- 4.
5. Drag and drop the section field to consumer details and create the section.
6. Enter the section name as “Personal details”, → click Ok.



7. Now drag the fields to this section that mentioned , they are
 - First name , last name , consumer name , phone number, email, rice mill name.
8. Follow the same process for another two sections as shown above , they are
9. One section is “ rice details ” , drag the fields that are
 - Rice taken by shop, rice type.
10. Another section is “Receipt details ” , and drag the fields that are
 - Mode of payment , Amount paid.
11. Then , Click save.

12.



Milestone 7 : Profiles

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visual force page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

1. **Standard profiles:**

By default salesforce provides below standard profiles.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

We cannot delete standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

2. **Custom Profiles:**

Custom ones defined by us.

They can be deleted if there are no users assigned with that particular one.

Activity 1: owner Profile

To create a new profile:

1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (Standard User) → enter profile name (owner) → Save.

SETUP Profiles

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(0\)](#) |
 [Enabled Apex Class Access \(0\)](#) |
 [Enabled Visualforce Page Access \(0\)](#) |
 [Enabled External Data Source Access \(0\)](#) |
 [Enabled Named Credential Access \(0\)](#) |
 [Enabled External Credential Principal Access \(0\)](#) |
 [Enabled Custom Metadata Type Access \(0\)](#) |
 [Enabled Custom Setting Definitions Access \(0\)](#) |
 [Enabled Flow Access \(0\)](#) |
 [Enabled Service Presence Status Access \(0\)](#) |
 [Enabled Custom Permissions \(0\)](#)

Profile Detail [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	owner	
User License	Salesforce	
Description		
Created By	user@cs.cet.ac.bd	10/07/2023, 10:56 am
Modified By	user@cs.cet.ac.bd	10/07/2023, 10:56 am

Page Layouts

Standard Object Layouts	Global	Object Milestone
Email Application	Global Layout (View Assignment)	Direct Milestone Layout (View Assignment)
Home Page Layout	Not Assigned (View Assignment)	Operating Hours Layout (View Assignment)
Account	DE Default (View Assignment)	Opportunity Layout (View Assignment)
Alternative Payment Method	Account Layout (View Assignment)	Opportunity Product Layout (View Assignment)
Appointment Invitation	Alternative Payment Method Layout (View Assignment)	Order Layout (View Assignment)
	Appointment Invitation Layout (View Assignment)	Order Product Layout (View Assignment)

-
-
- Scroll down to Custom Object Permissions and Give access permissions for consumers, rice details , rice mill and suppliers objects as mentioned in the below diagram.

SETUP Profiles

Custom Object Permissions

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	purchasers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asset Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	reviews	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	rice details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	rice mills	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Brokers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SolarBots	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
consumers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	SolarBot Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	studs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
energy audits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	super marts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
nick names	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	suppliers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
positions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	teachers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	tickets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ProjectTasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	vendors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Properties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							

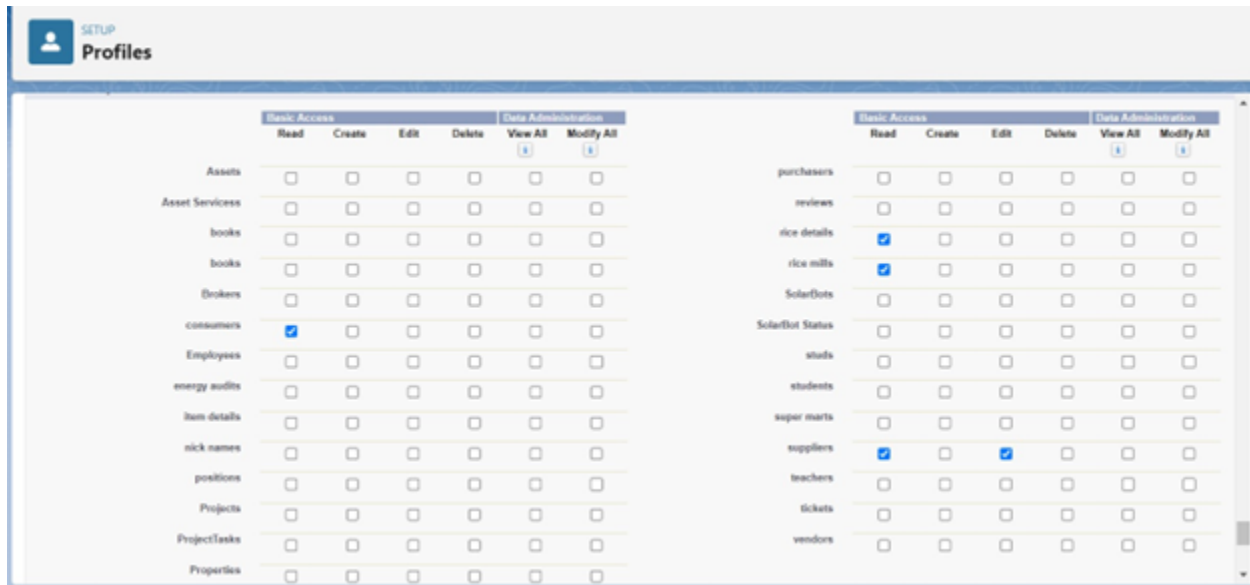
Session Settings

-
-
-
-
- Give access and save it.

Activity 2: employer Profile

- Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (Standard Platform User) → enter profile name (employer) → Save.
- While still on the profile page, then click Edit.
- Select the Custom App settings as default for the rice mill..

4. Scroll down to Custom Object Permissions and Give access permissions for consumer, rice details , rice mill and suppliers objects as mentioned in the below diagram.



	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asset Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brokers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
consumers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
energy audits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
nick names	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
positions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ProjectTasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Properties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
purchasers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
reviews	<input 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"/>
rice mills	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SolarDots	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SolarBot Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
studs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
super marts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
suppliers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
teachers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
tickets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
vendors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. And click save.

Activity 3: worker Profile

1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (Standard Platform User) → enter profile name (worker) → Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the rice mill.
4. Scroll down to Custom Object Permissions and Give access permissions for consumer, rice details , rice mill and suppliers objects as mentioned in the below diagram.

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asset Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brokers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
consumers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
energy audits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
item details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
nick names	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
positions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Projects	<input 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
purchasers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
reviews	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
rice details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
rice mills	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SolarBots	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SolarBot Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
stude	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
super marts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
suppliers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
teachers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
tickets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. And click save.

Milestone 8 : Role & Role Hierarchy

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Activity 1: Creating owner Role

Creating owner Role:

1. Go to quick find → Search for Roles → click on set up roles.
2. Go to quick find → Search for Roles → click on set up roles.

Setup Roles

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy: Territory-based Sample

View other sample Role Hierarchies: Territory-based Sample

Executive Staff

- Business Development
- Sales
- Support

Business Development

- Business Development
- Sales
- Support

Sales

- Sales
- Support

Support

- Support

Set Up Roles

3. Click on Expand All and click on add role under whom this role works.



1. Give Label as "owner" and Role name gets auto populated. Then click on Save.

- 2.
3. Click and save it.

Activity 2: Creating employer roles

Creating another two roles under manager

1. Go to quick find → Search for Roles → click on set up roles.
2. Click plus on CEO role, and click add role under owner.
- 3.
4. Give Label as "employer" and Role name gets auto populated. Then click on Save.
5. Repeat the same steps, for another role.
6. Click plus on CEO role, and click plus on owner, and click add role under employer

7. .
7. give Label as “worker” and Role name gets auto populated. Then click on Save.

Milestone 9 : Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Activity 1: Create User

1. Go to setup → type users in quick find box → select users → click New user.
2. Fill in the fields
3. First Name : Vicky
4. Last Name : y
5. Alias : Give a Alias Name
6. Email id : Give your Personal Email id
7. Username : Username should be in this form: text@text.text
8. Nick Name : Give a Nickname
9. Role : owner
10. User license : Salesforce
11. Profiles : owner.

Save it.

Activity 2: creating another users

12. Go to setup → type users in quick find box → select users → click New user.

13. Fill in the fields

14. First Name : ram

15. Last Name : ram

16. Alias : Give a Alias Name

17. Email id : Give your Personal Email id

18. Username : Username should be in this form: text@text.text

19. Nick Name : Give a Nickname

20. Role : employer

21. User license : Salesforce platform

22. Profiles : standard platform user.

23. Go to setup → type users in quick find box → select users → click New user.

24. Fill in the fields

25. First Name : rage

26. Last Name : raj

27. Alias : Give a Alias Name

28. Email id : Give your Personal Email id

29. Username : Username should be in this form: text@text.text

30. Nick Name : Give a Nickname

31. Role : worker

32. User license : Salesforce platform

33. Profiles : standard platform user.

Milestone 10 : Permission sets

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles and are the recommended way to manage your users' permissions.

Activity 1: Creating OWD setting.

1. Go to setup → type "sharing settings" in quick search → Click edit.

2. Scroll down, change the default internal access to " public read-only" for rice mill and supplier object.

3. Click save.
4. Extra information, By these every profile has their own access, according to their profile.
5. But in our case we created roles and given the roles in such a way that the owner can see employer and worker records, and the employer can see the worker records.

Note : create the latest “10” records in consumer objects.

Try to fill every field in each record for better experience.

Milestone 11 : Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics. In Salesforce.com we can easily generate reports in different styles. And can create reports in a very short time and also schedule the reports. Salesforce provides a powerful suit of analytic tools to help you organize, view and analyse your data.

Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

1. Tabular Reports: Simple listing of data without any subtotals. This type of reports provide you most basically to look at your data. Use tabular reports when you want a simple list or a list of items with a grand total.

Example: This type of reports are used to list all accounts, List of contacts, List of opportunities.....etc.....

2. Summary Reports: This type of reports provide a listing of data with groupings and sub totals. Use summary reports when you want subtotals based on the value of a particular field or when you want to create a hierarchically grouped report, such as sales organized by year and then by quarter.

Example: All opportunities for your team sub totalled by Sales Stage and Owner.

3. Matrix Reports: This type of reports allow you to group records both by row and by column. A comparison of related totals, with totals by both row and column. Use matrix reports when you want to see data by two different dimensions that aren't related, such as date and product.

Example: Summarize opportunities by month vertically and by account horizontally.

4. Joined Reports: Blocks of related information in a single report. This type of reports enable you to adopt five different blocks to display different types of related data. Each block can own unique columns, summary fields, formulas, filters and sort order. Use joined reports to group and show data from multiple

report types in different views.

Example: You can build a report to show opportunity, case and activity data for your accounts.

Activity 1: Create Report

1. Go to the app → click on the reports tab
2. Click New Report.
3. select for report type, search for “rice mill with consumers” click on it. And click on start report.
1. Their outline pane is opened already, select the fields that are mentioned below in the column section.
 - 1.consumer name
 - 2.rice type
 - 3.rice price/kg
 - 4.mode of payments
 - 5.amount paid
2. Remove the unnecessary fields.
3. Select the fields that are mentioned below in the GROUP ROWS section.
 - a. Rice taken by shops.

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

Activity 2: Sharing report to owner

1. Click edit drop down and select subscribe option
- 2.
3. Follow as per below image.
- 4.
5. After selecting the run report as a “another person” select your personal account or whom you want to send that mail to.
6. Click save.

NOTE: The owner gets daily email notification of that rice mill report.so that he can see all data remotely.

Activity 3: create a report folder

1. Click on the app launcher and search for reports.
2. Double click on the report, " reports tab" will be auto populated in the navigation bar.
3. Click on the report tab, click on the new folder.
4. Give the Folder label as "estimated rice per day ", Folder unique name will be auto populated.
5. Click save.

1. navigate to app launcher and click reports on that.
2. click all reports.
3. Select the range of amount per day drop down in that click move.
- 4.
5. Select estimated rice per day folder and select folder.

Note: if you want to see the report which you have created then go to reports - all folders - estimated rice per day - your report will appear in this way.

Milestone 12 : Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

Activity 1: Create Dashboard Folder

1. Click on the app launcher and search for the dashboard.
2. Click on the dashboard tab.
3. Click the new folder, give the folder label as " amount data dashboard".
4. Folder unique names will be auto populated.
5. Click save.
- 6.

Activity 2: Create Dashboard

1. Go to the app → click on the Dashboards tabs.
2. Give a Name and select the folder that was created, and click on create.
1. Select add component.
1. Select a Report and click on select.
1. Preview is shown below.

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.

Add the component

Again select add component with above same steps

- 1.display as donut chart
- 2.sort by - sum of amount
- 3.title-range of amount per day
- 4.component theme dark

Click add.

Click save and done.

LEARNING OUTCOMES

- Real-time Salesforce project implementation
- Understanding of objects and relationships in Salesforce
- Creating and using formula fields and validation rules
- Developing cross-object formula fields
- Customizing page layouts
- Creating rollup summary fields
- Generating reports and dashboards

CONCLUSION

The Rice Mill CRM Application aims to revolutionise the management and operational efficiency of rice mills by providing a robust and tailored CRM solution. With features like detailed reporting, rollup summary fields, cross-object formulas, validation rules, and customized permission sets, this application addresses the unique needs of a rice mill factory, ensuring streamlined processes and enhanced customer satisfaction.