

**PROJECT REPORT**

**ON**

**A CRM APPLICATION FOR**

**WHOLESALE RICE MILL**

**BY**

**ASHAJYOTHI GOUNI**

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## **DESCRIPTION**

The Rice Mill CRM Application is a comprehensive solution designed to streamline and simplify how much rice per day, how many were sold that rice and which type of rice all reports send to owners daily wise. It leverages the power of customer relationship management (CRM) to enhance customer experiences, optimize store operations, and improve overall efficiency in the rice mill factory. This project aims to develop a user-friendly and feature-rich application that addresses the specific needs of a rice mill factory.

## **INTRODUCTION TO SALESFORCE**

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

### **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 :

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- Build apps fast with drag and drop tools
- Customize your data model with clicks
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- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

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Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name\*

Last Name\*

Email\*

Role\*

Company\*

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 :

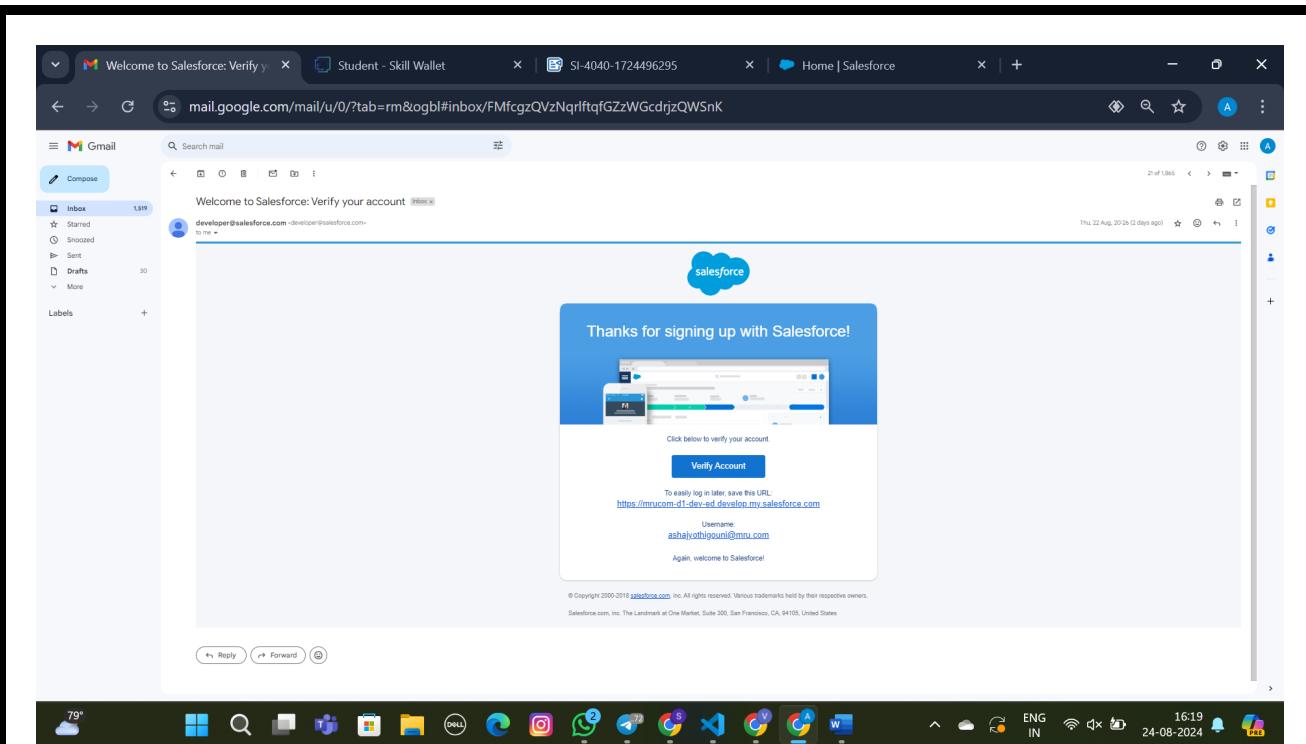
username@organization.com

**USERNAME :** **ashajyothigouni@mru.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.
4. Then you will redirect to your salesforce setup page.



## 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.

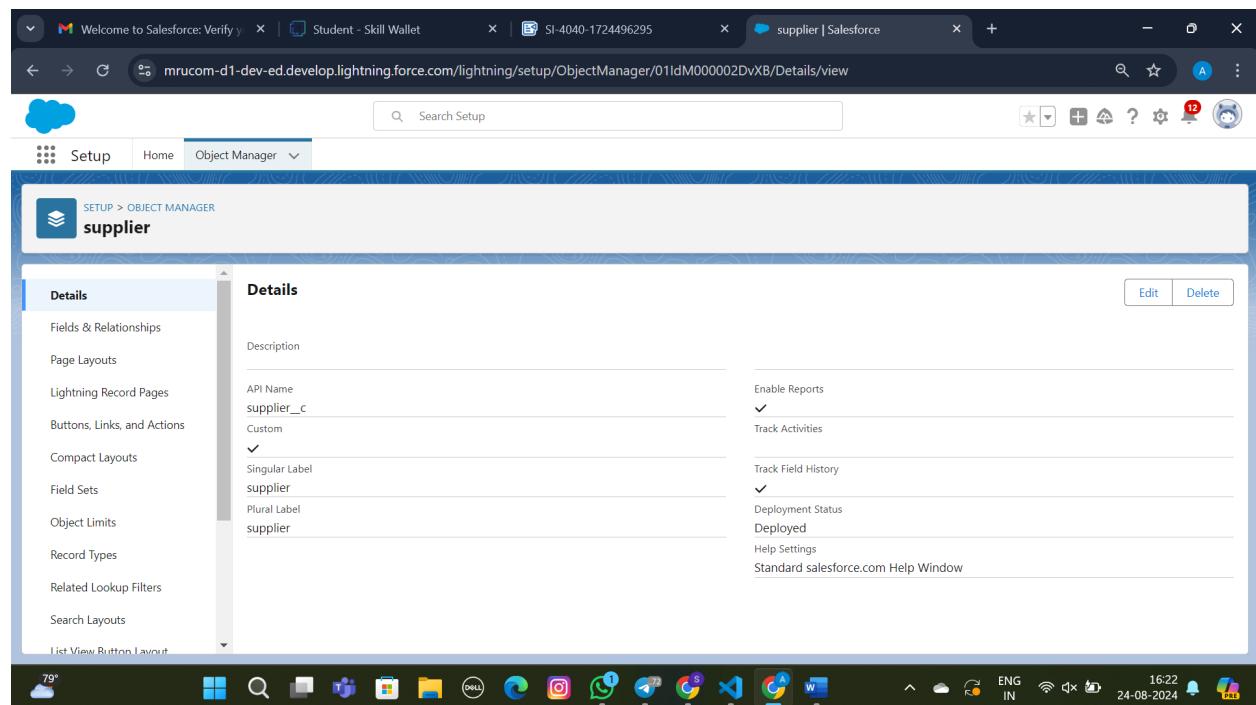
- Click on Save.

#### Activity 1: Create Supplier Object:

To create an object:

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

Allow search → **Save**.



#### Activity 2: Create Rice mill Object:

To create an object:

- From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
- Enter the label name → rice mill
- Plural label name → rice mills

4. Enter Record Name Label and Format
5. Record Name →
6. Data Type → Auto Number
7. Display Format → rice-{000},Starting number → 1
8. Click on Allow reports and Track Field History, Allow Search.
9. Allow search → **Save.**

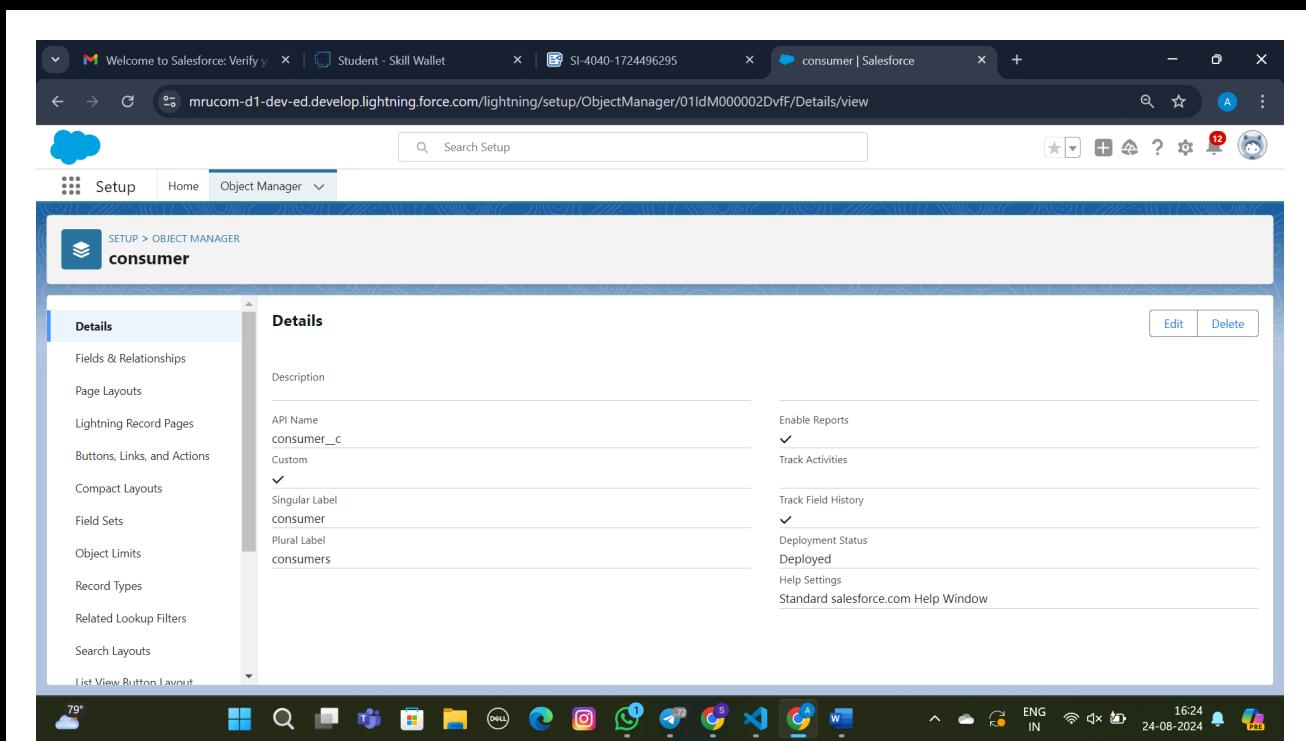
The screenshot shows the Salesforce Object Manager interface. The object being edited is 'rice mill'. In the 'Details' section, the API Name is 'rice\_mill\_\_c'. Under 'Singular Label', it is set to 'rice mill', and under 'Plural Label', it is set to 'rice mills'. The 'Enable Reports' checkbox is checked. The 'Deployment Status' is listed as 'Deployed'. The interface includes a left sidebar with various setup options like Fields & Relationships, Page Layouts, and Lightning Record Pages. The system tray at the bottom shows the date as 24-08-2024 and time as 16:23.

### Activity 3: Create consumer Objects:

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

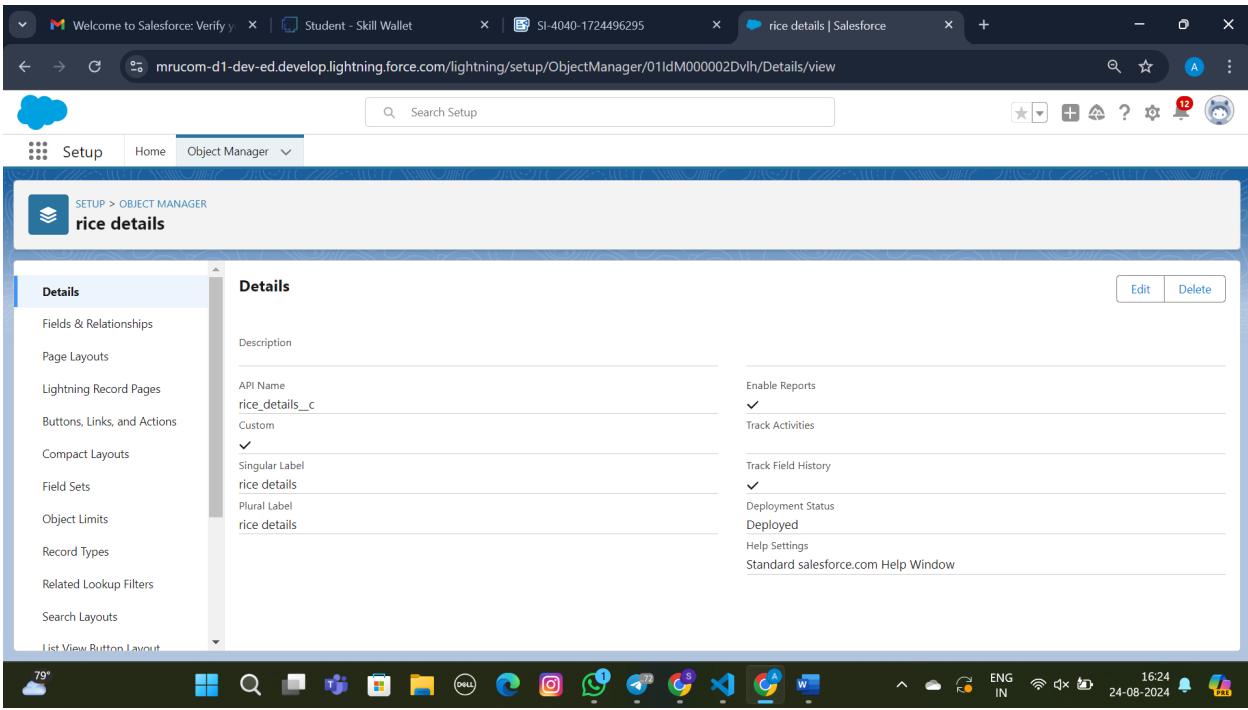
1. Use these display format for the **consumer**

1. label name → **consumer**
2. Plural label name → **consumers**
3. Display Format → **consumers-{000}**
4. Starting number → 1



#### Activity 4: Create rice details Objects:

1. Use these display format for the rice details
  1. label name → rice details
  2. Plural label name → rice details
  3. Display Format → rice-{000}
  4. Starting number → 1



## TABS

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

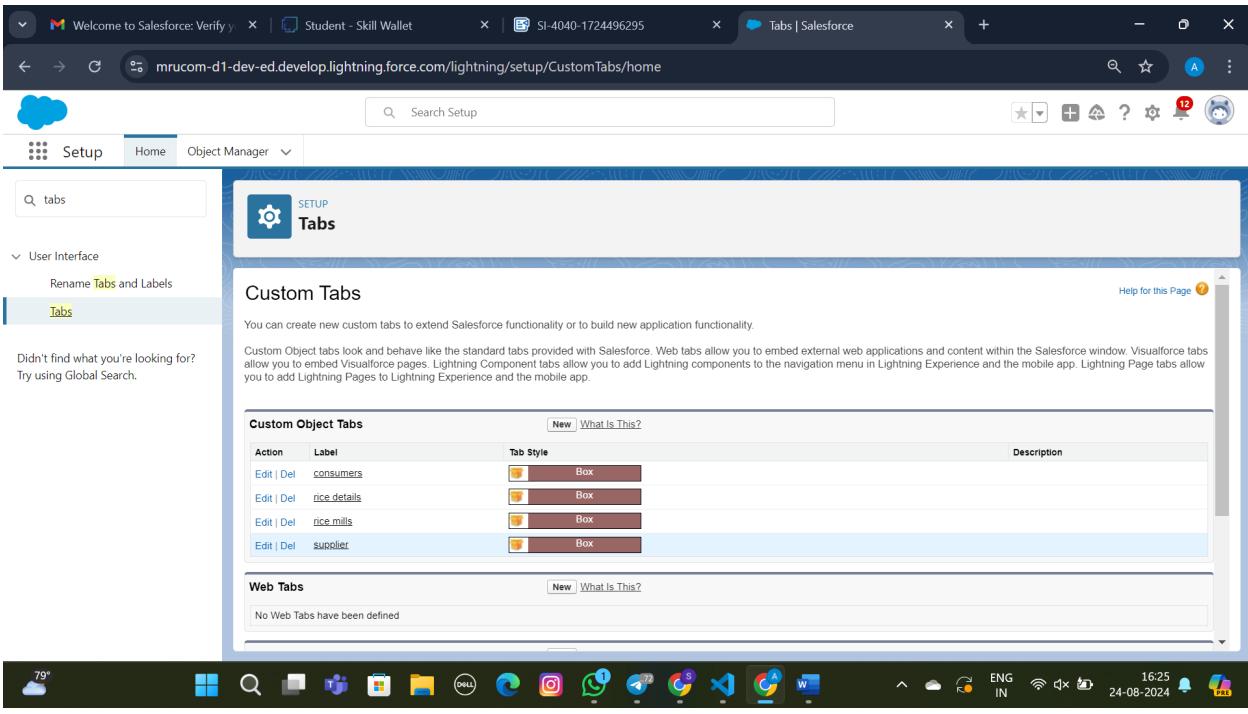
### Activity 1: Creating a Custom Tab

#### 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

### Activity 2: Creating Remaining Tabs

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



## 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 color 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.

**App Settings**

**App Details & Branding**

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

**App Details & Branding**

App Details

\* App Name: MY RICE

\* Developer Name: MY\_RICE

Description: Enter a description...

App Branding

Image:

Primary Color Hex Value: #0070D2

Org Theme Options:  Use the app's image and color instead of the org's custom theme

App Launcher Preview

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.

**App Settings**

App Details & Branding

App Options

Utility Items (Desktop Only)

**Navigation Items**

User Profiles

**Navigation Items**

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

**Available Items**

Type to filter list...

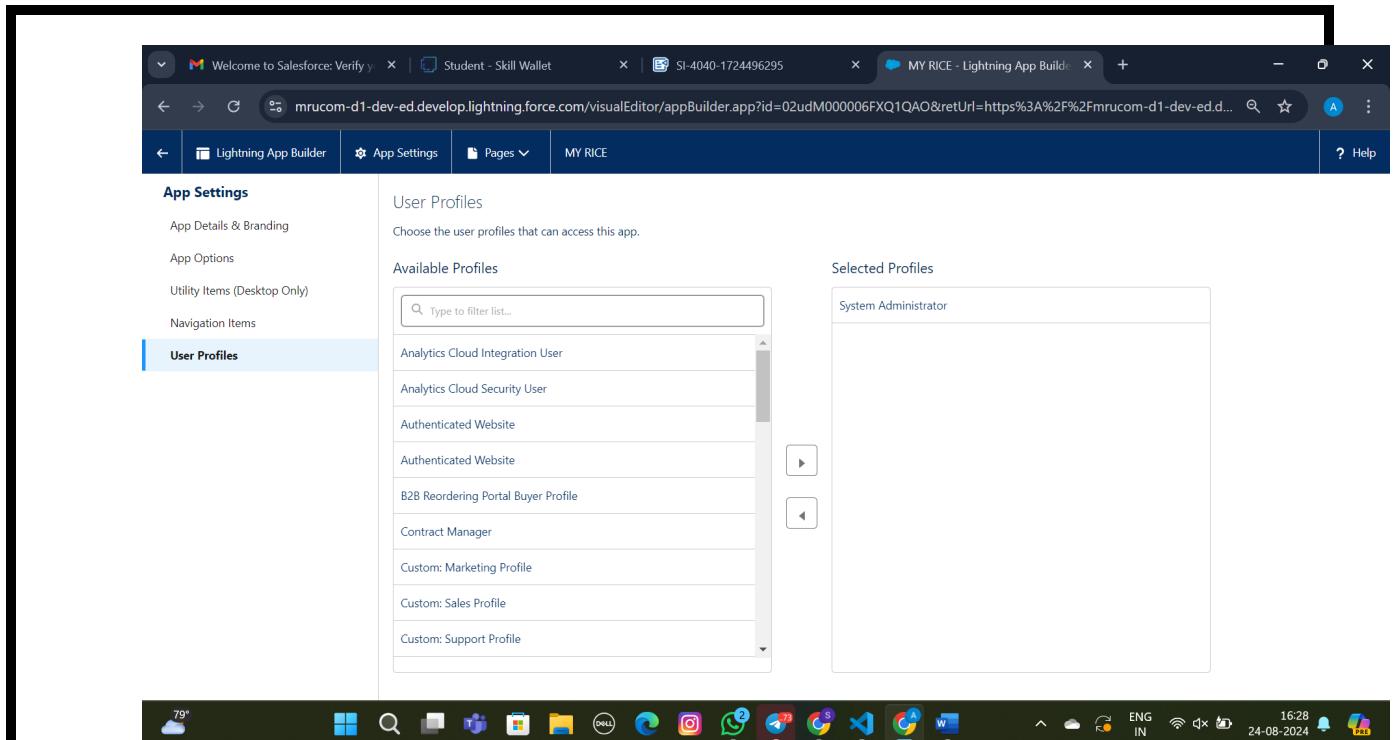
- Accounts
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests

**Selected Items**

- rice details
- rice mills
- consumers
- supplier

5. To Add User Profiles:

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



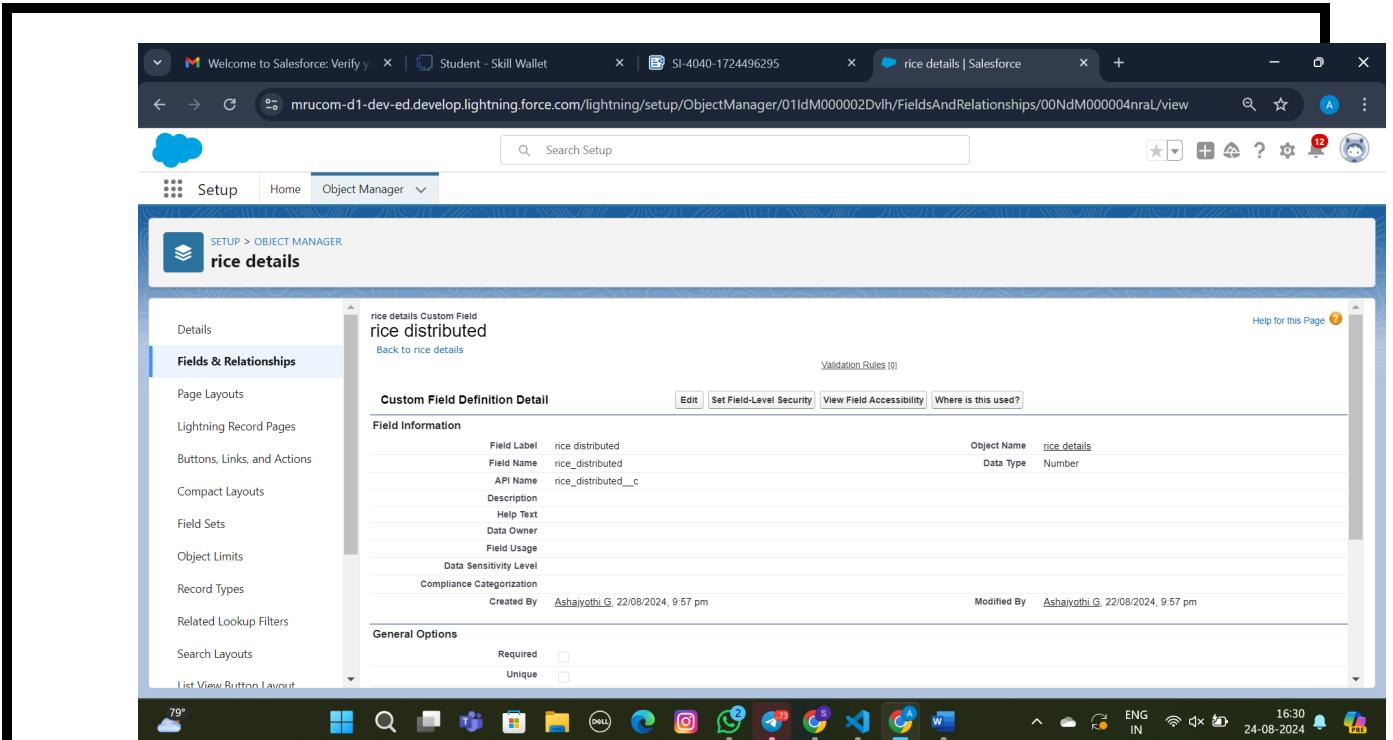
## FIELDS

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.

### 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.
1. Click on fields & relationship → click on New.
2. Select Data type as "Number" and click Next.
3. Given the Field Label as "rice distributed" and length as "5".
4. 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.

The screenshot shows the Salesforce Object Manager interface. A custom field named 'supplier Name' is being edited under the 'rice details' object. The field is defined as a 'Master-Detail' type, related to the 'rice details' object. The 'Sharing Setting' is set to 'ReadWrite'. The field has a label 'supplier Name' and a field name 'supplier'. It was created by 'Asha@othi.Q' on 22/08/2024, 10:02 pm, and modified by the same user on the same date and time.

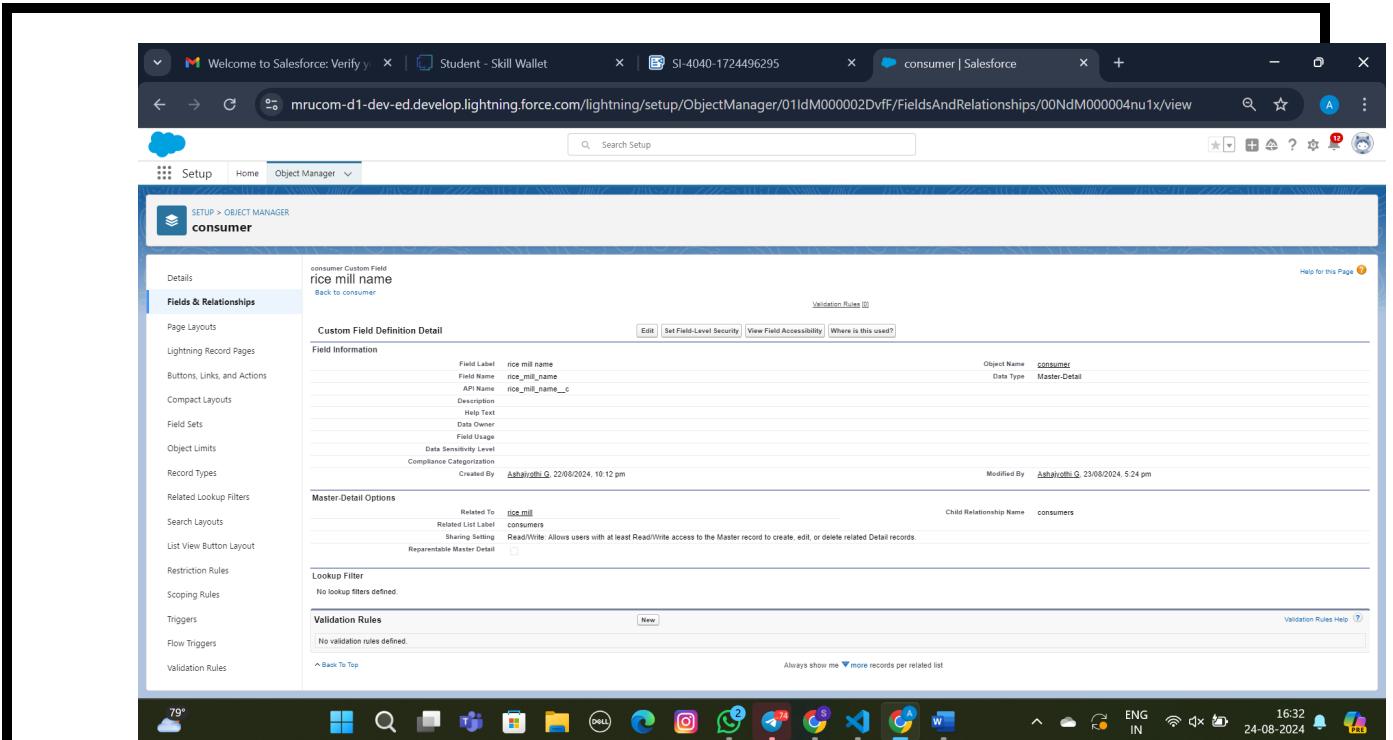
### Activity 3 : Creating a Master-Detail Relationship

master-detail relationship is a type of relationship between two objects where the master object controls certain behaviors 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 summarizes 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.
1. Now click on “Fields & Relationships” → New
2. Select the data type as “Rollup summary”, and click Next.
3. Give the Field label as “sum of rice distributed”, Field Name will be Auto generated, and click Next.
1. Select the summarized object as “rice details”.
2. Select the Rollup type as “sum”.
3. Select the field to aggregate as “rice distributed”, and click Next → Next → Save.
  
1. Follow the same steps for the rice mill Object from 1 to 3
2. Give the Field label as “rice distributed to shops”, Field Name will be Auto generated, and click Next.
3. Select the summarized object as “rice details”.
4. Select the Rollup type as “sum”.
5. Select the field to aggregate as “rice distributed”, and click Next → Next → Save.
6. Note : create the field as “rice taken by shops in kgs” using number datatype in

## consumer object

7. Follow the same steps for the rice mill Object from 1 to 3
8. Give the Field label as " rice taken ",Field Name will be Auto generated, and click Next.
9. Select the summarized object as " consumer".
10. Select the Rollup type as "sum".
11. Select the field to aggregate as " rice taken in shops ", and click Next → Next → Save.

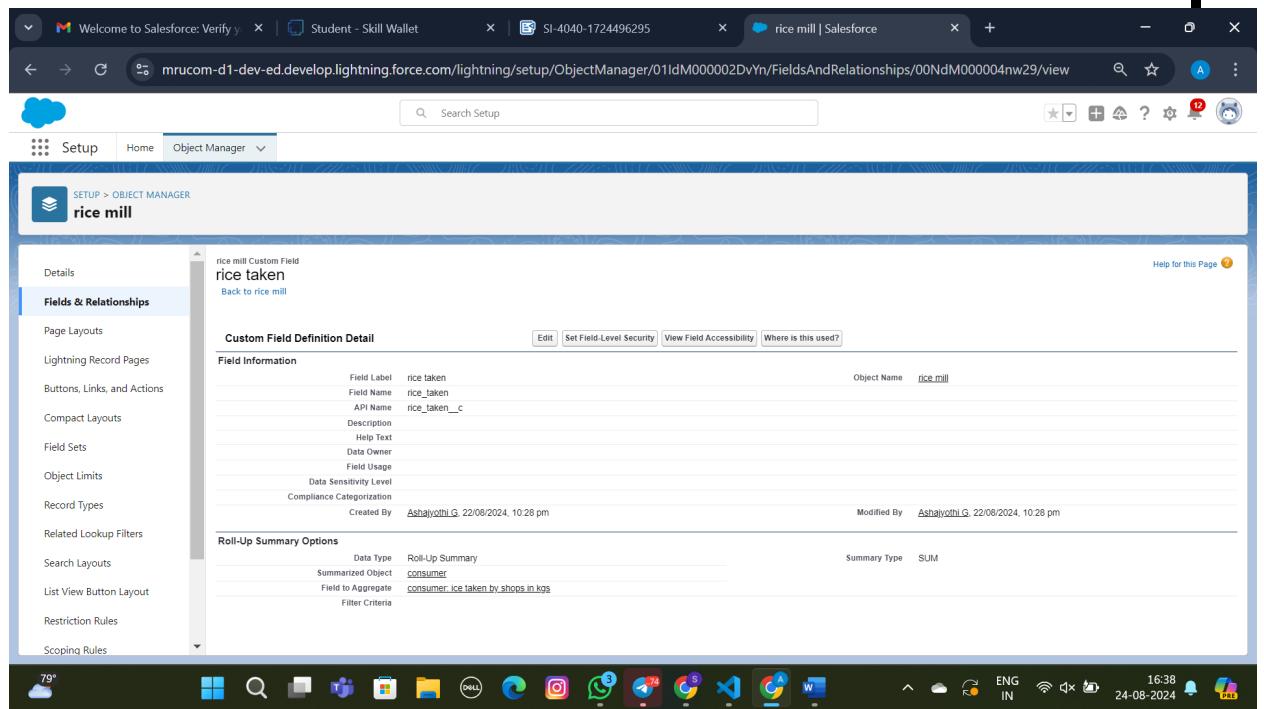
The screenshot shows the Salesforce Object Manager interface. A custom field named 'sum of rice distributed' has been created on the 'supplier' object. The field information includes:

Field Label	sum of rice distributed
Field Name	sum_of_rice_distributed
API Name	sum_of_rice_distributed_c
Description	Help Text
Data Owner	Field Usage
Data Sensitivity Level	Compliance Categorization
Created By	Ashayothi_G_ 22/08/2024, 10:17 pm
Modified By	Ashayothi_G_ 22/08/2024, 10:17 pm

The roll-up summary options are set to:

Data Type	Roll Up Summary
Summarized Object	rice details
Field to Aggregate	rice_details_rice_distributed
Filter Criteria	

The screenshot also shows the 'rice details' object setup page, where a custom field 'rice distributed' has been created. This field is of type Number and has a length of 5 and decimal places of 0.



## Activity 5 : Creating Fields in Objects

### 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 “ supplier name ” and length as “ 5 ”.
5. Field Name will be auto populated, and click on Next → Next → Save.

The screenshot shows the Salesforce Object Manager interface for the 'rice details' object. The left sidebar has 'Fields & Relationships' selected. The main area displays a table titled 'Fields & Relationships' with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table contains the following data:

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_c	Master-Detail(rice mill)		✓
supplier Name	supplier_c	Master-Detail(supplier)		✓

## 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"

The screenshot shows the Salesforce Object Manager interface for the 'rice mill' object. The left sidebar has 'Fields & Relationships' selected. The main area displays a table titled 'Fields & Relationships' with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table contains the following data:

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 mill Name	Name	Auto Number		✓
rice price/kg	rice_price_kg_c	Number(5, 0)		✓
rice taken	rice_taken_c	Roll-Up Summary (SUM consumer)		✓

## Activity 7: Creating Fields in consumer Objects

## 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.
  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.

The screenshot shows the Salesforce Object Manager interface. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main area displays the 'consumer Custom Field Amount Paid' details. The 'Field Information' section shows the Field Label as 'Amount Paid', Field Name as 'Amount\_Paid', API Name as 'Amount\_Paid\_\_c', and Data Type as 'Formula'. The formula entered is 'Rice\_taken\_by\_shops\_\_c \* rice\_mill\_name\_\_r.rice\_price\_kg\_\_c'. Other details include a Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'Object Name' is set to 'consumer'. The 'Formula Options' section shows the Data Type as 'Formula' and Decimal Places as '2'. The 'Created By' and 'Modified By' fields both show 'Ashajyothi\_G' with the timestamp '23/08/2024, 5:25 pm'. The status bar at the bottom indicates it's 16:42, ENG IN, and the date is 24-08-2024.

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

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 “Consumer Name” and select formula return type as “TEXT” and click next.
5. Insert field formula should be : First\_Name\_\_c + '' + Last\_Name\_\_c  
click “Check Syntax” and Save

The screenshot shows the Salesforce Object Manager interface. The left sidebar has a 'Fields & Relationships' section selected. The main area displays the 'Consumer Name' custom field for the 'consumer' object. The field details are as follows:

- Field Label:** Consumer Name
- Field Name:** Consumer\_Name
- API Name:** Consumer\_Name\_c
- Description:** (empty)
- Help Text:** (empty)
- Data Owner:** (empty)
- Field Usage:** (empty)
- Data Sensitivity Level:** (empty)
- Compliance Categorization:** (empty)

Created By: Ashayothi\_G 23/08/2024, 5:29 pm Modified By: Ashayothi\_G 23/08/2024, 5:29 pm

**Formula Options**  
Data Type: Formula  
First\_name\_c + ' ' + Last\_name\_c

## 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 "Phonenumberoremailblankrule".
4. Enter the description as "phone number and email number should not be blank".
5. Enter the formula as "OR( ISBLANK( phone\_number\_c ), ISBLANK( email\_c ) )" and check the syntax.
6. Under the error message write as "please fill in your phone number."
7. Select error location "top of page".

## 8. Save the validation rule.

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with links like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main area is titled "consumer Validation Rule". It shows a "Validation Rule Detail" section with the following details:

Rule Name	Phonenumberoremailblankrule	Active
Error Condition Formula	OR( ISBLANK( Phone_number__c ), ISBLANK( email__c ) )	✓
Error Message	please fill in your phone number	Error Location Top of Page
Description	phone number and email number should not be blank	
Created By	Ashayothi.G. 23/08/2024, 5:33 pm	Modified By Ashayothi.G. 23/08/2024, 5:33 pm

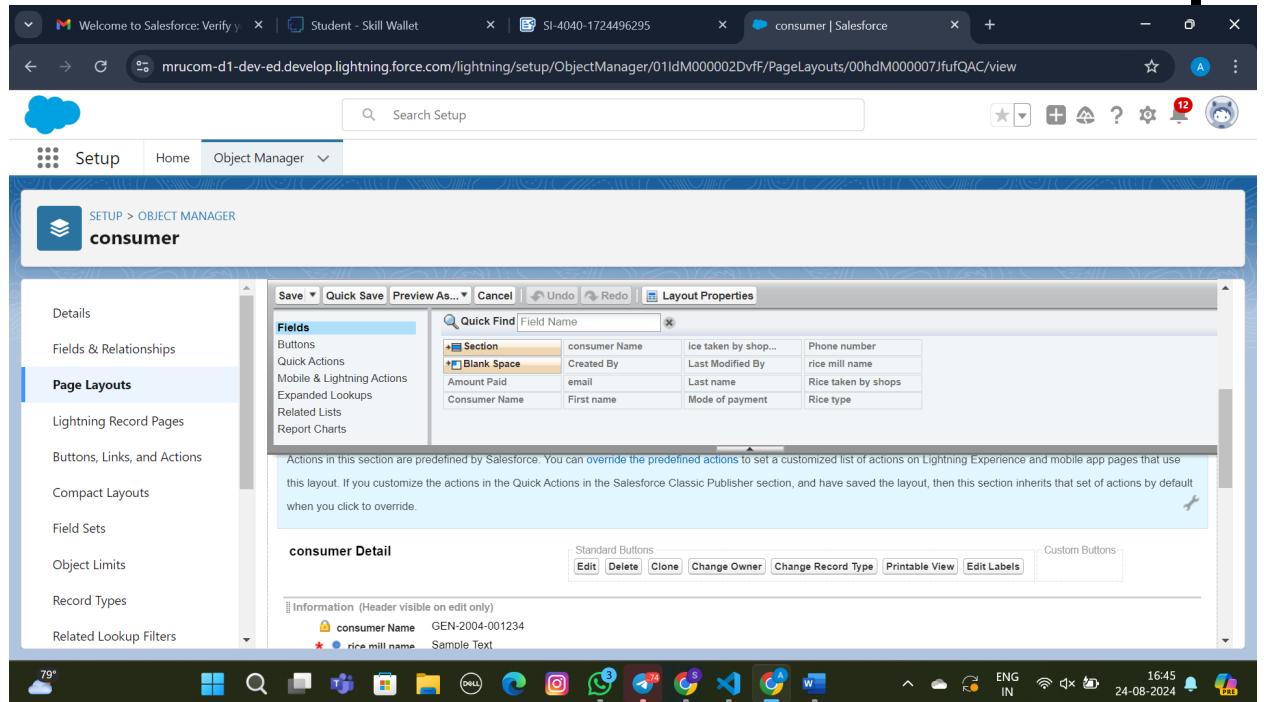
## PAGE LAYOUTS

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.
- 
1. Select the existing page layout, and give the page layout name as "consumer layout", and click save.
  2. Drag and drop the section field to consumer details and create the section.
  3. Enter the section name as "Personal details", → click Ok.
  4. Now drag the fields to this section that mentioned , they are  
First name , last name , consumer name , phone number, email, rice mill name.
  - 5.Follow the same process for another two sections as shown above , they are
  - 6.One section is " rice details " , drag the fields that are  
Rice taken by shop, rice type.
  - 7.Another section is "Receipt details " , and drag the fields that are  
Mode of payment , Amount paid.
  - 8.Then , Click save.



## 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, Visualforce 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.

### 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.
1. 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.
2. Give access and save it.

The screenshot shows the Salesforce Setup interface. The main page is titled "Profiles" under the "SETUP" tab. On the left, there's a sidebar with a search bar and sections for "Users" and "Profiles". The "Profiles" section is currently selected. The main content area shows a profile named "owner". It has a "Profile Detail" section with fields for Name (owner), User License (Salesforce), Description, Created By (Ashajyothi\_G, 23/08/2024, 5:45 pm), and Modified By (Ashajyothi\_G, 23/08/2024, 5:48 pm). Below this is a "Custom Profile" checkbox which is checked. There are also buttons for Edit, Clone, Delete, and View Users. At the bottom, there's a "Page Layouts" section with tabs for Standard Object Layouts, Global, and Global Layout. The status bar at the bottom shows system information like battery level (79%), network, and the date/time (24-08-2024, 16:46).

## Activity 2: employer Profile

1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (Standard Platform User) → enter profile name (employer) → 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.
5. And click save.

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

- Setup Bar:** Includes links for Welcome to Salesforce: Verify, Student - Skill Wallet, SI-4040-1724496295, and Profiles | Salesforce.
- Header:** Shows a search bar with "Search Setup" and various navigation icons.
- Left Sidebar:** Under "Users", the "Profiles" tab is selected. A message says "Didn't find what you're looking for? Try using Global Search."
- Profile Detail:** The "employer" profile is selected. It has the following details:
  - Name:** employer
  - User License:** Salesforce Platform
  - Description:** (empty)
  - Created By:** Ashajyothi\_G, 23/08/2024, 5:49 pm
  - Modified By:** Ashajyothi\_G, 23/08/2024, 5:50 pm
- Permissions:** A list of enabled permissions includes: 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], and Enabled Custom Permissions [0].
- Buttons:** Edit, Clone, Delete, View Users.
- Page Layouts:** A section for "Standard Object Layouts" with options for Global and Global Layout.

### 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.
5. And click save.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The 'worker' profile is selected. The page displays the following information:

- Profile worker**
- Users with this profile have the following permissions and page layouts listed below.
- Permissions listed:
  - 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	worker			
User License	Salesforce Platform			Custom Profile <input checked="" type="checkbox"/>
Description				
Created By	Ashajyothi_G	23/08/2024, 5:51 pm		Modified By Ashajyothi_G 23/08/2024, 5:52 pm
- Page Layouts**
  - Standard Object Layouts
  - Global Layout
  - Lead Layout

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

The screenshot shows the Salesforce Setup interface with the 'Roles' page open. The left sidebar shows navigation options like 'Setup', 'Home', 'Object Manager', and a search bar. The main content area is titled 'Creating the Role Hierarchy' and displays a tree view of roles for 'Malla Reddy University'. The hierarchy includes:

- CEO
- CFO
- COO
- SVP\_Customer Service & Support
- SVP\_Human Resources
- SVP\_Sales & Marketing
- owner
- employer
- worker

Each role has 'Edit | Del | Assign' buttons next to it. A 'Help for this Page' link is at the top right of the content area.

## 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
  1. First Name : vicky
  2. Last Name : y
  3. Alias : Give a Alias Name
  4. Email id : Give your Personal Email id
  5. Username : Username should be in this form: text@text.text
  6. Nick Name : Give a Nickname
  7. Role : owner
  8. User license : Salesforce
  9. Profiles : owner.

Save it.

## Activity 2: creating another users

1. Go to setup → type users in quick find box → select users → click New user.
2. Fill in the fields

First Name : ram

Last Name : ram

Alias : Give a Alias Name

Email id : Give your Personal Email id

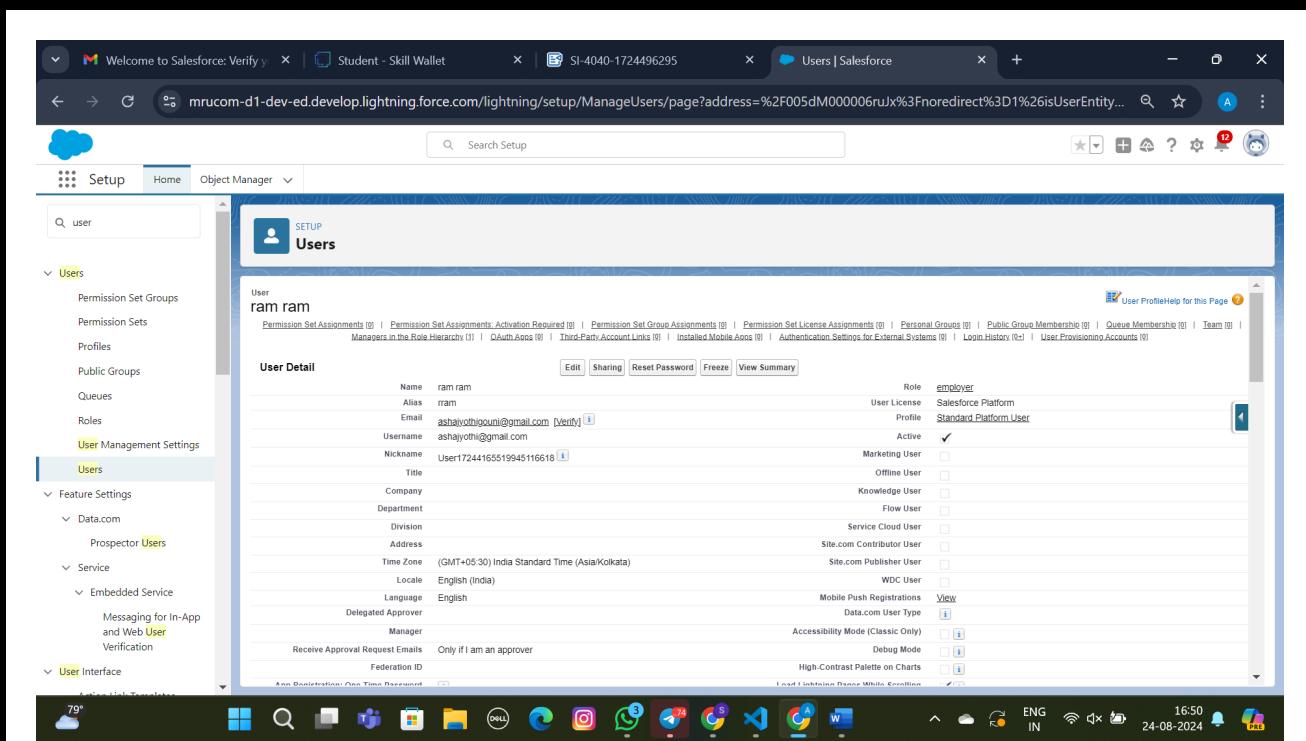
Username : Username should be in this form: text@text.text

Nick Name : Give a Nickname

Role : employer

User license : Salesforce platform

Profiles : standard platform user.



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

4.Fill in the fields

First Name : ragu

Last Name : raj

Alias : Give a Alias Name

Email id : Give your Personal Email id

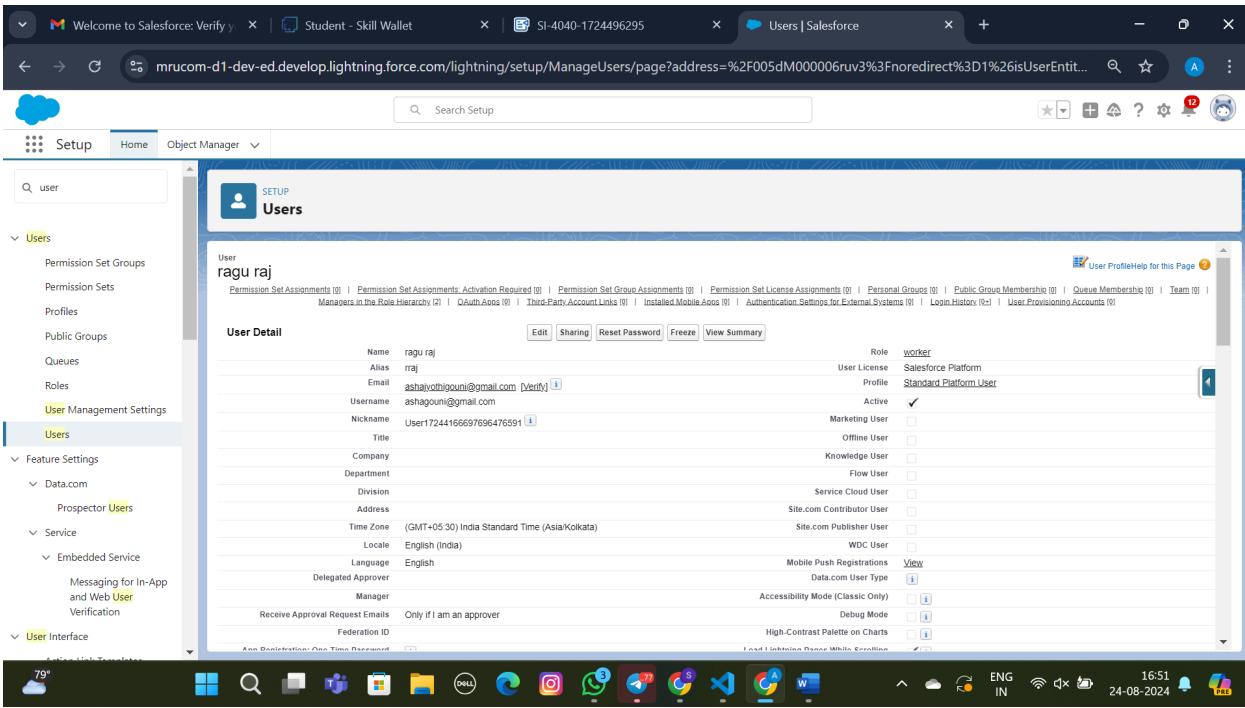
Username : Username should be in this form: text@text.text

Nick Name : Give a Nickname

Role : worker

User license : Salesforce platform

Profiles : standard platform user.



## 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.

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The left sidebar has 'Sharing' selected under 'Security'. The main area displays 'Default Sharing Settings' for 'Organization-Wide Defaults'. A table lists objects like Lead, Account & Contract, Contact, Order, Asset, Opportunity, Case, Campaign, Campaign Member, and User, along with their internal and external access levels and hierarchy rules.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account & Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓

Note : create the latest "10" records in consumer objects.Try to fill every field in each record for better experience

The screenshot shows the 'Recently Viewed' list for the 'consumers' object. The top navigation bar includes tabs for 'MY RICE', 'rice details', 'rice mills', 'consumers' (which is active), and 'supplier'. The main area displays a list of 10 recently viewed consumer records, each with a checkbox and a dropdown menu.

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

## 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 analyze your data.

### 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.
4. 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
1. Remove the unnecessary fields
2. Select the fields that are mentioned below in the GROUP ROWS section.
  - i. Rice taken by shops.
7. Click save and run and save the report as “range of amount per day”.and save it.

The screenshot shows a Salesforce Lightning report titled "range of amount per day". The report displays data for "rice mills with consumers". The top navigation bar includes links for "Welcome to Salesforce: Verify", "Student - Skill Wallet", and "SI-4040-1724496295". The main interface features a search bar and a breadcrumb trail: "MY RICE" > "rice details" > "rice mills" > "consumers" > "supplier" > "range of amount per day". The report table has columns: "Rice taken by shops", "rice price/kg", "Rice type", "Consumer Name", "Mode of payment", and "Amount Paid". The data shows various transactions across different consumers and payment methods. The bottom of the screen shows the Windows taskbar with icons for weather, file explorer, and various applications like Google Chrome, Microsoft Word, and Microsoft Excel.

Rice taken by shops	rice price/kg	Rice type	Consumer Name	Mode of payment	Amount Paid
3 (1)	23	1.basmati	ash h	Net banking	69.00
<b>Subtotal</b>	23				69.00
5 (2)	235	1.basmati	sry g	Net banking	1.175.00
	87	1.basmati	hyu hy	Debit card	435.00
<b>Subtotal</b>	322				1.610.00
6 (2)	78	1.basmati	hyui hy	UPI	468.00
	4	2.normal rice	sat y	Credit card	24.00
<b>Subtotal</b>	82				492.00
8 (3)	98	2.normal rice	hjik k	Debit card	784.00
	89	1.basmati	hyui j	Debit card	712.00
	78	1.basmati	ujii k	Debit card	624.00
<b>Subtotal</b>	265				2.120.00
78 (1)	5	2.normal rice	ash hy	Cash	390.00
<b>Subtotal</b>	5				390.00

### Activity 2: Sharing report to owner

1. Click edit drop down and select subscribe option
2. After selecting the run report as a “another person” select your personal account or

whom you want to send that mail to.

3. Click save.

The screenshot shows a Salesforce Lightning page for a report titled "range of amount per day". The report details the consumption of rice by various consumers. A modal window titled "Edit Subscription" is open, allowing the user to set the frequency (Monthly), time (8:00 am), recipients (Send email to Me), and run report as (Me). The report table includes columns for Total Records, Total rice price/kg, and Total Amount Paid. The total amount paid is listed as 11,445.00.

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. 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.

Name	Created By	Created On	Last Modified By	Last Modified Date
Einstein Bot Reports	Automated Process	22/8/2024, 7:52 pm	Automated Process	22/8/2024, 7:52 pm
Einstein Bot Reports Spring '23	Automated Process	22/8/2024, 7:52 pm	Automated Process	22/8/2024, 7:52 pm
Einstein Bot Reports Summer '23	Automated Process	22/8/2024, 7:52 pm	Automated Process	22/8/2024, 7:52 pm
Einstein Bot Reports Summer '22	Automated Process	22/8/2024, 7:52 pm	Automated Process	22/8/2024, 7:52 pm
Einstein Bot Reports Winter '23	Automated Process	22/8/2024, 7:52 pm	Automated Process	22/8/2024, 7:52 pm
Enablement Dashboard Reports Spring '24	Automated Process	22/8/2024, 7:52 pm	Automated Process	22/8/2024, 7:52 pm
Enablement Dashboard Reports Summer '24	Automated Process	22/8/2024, 7:52 pm	Automated Process	22/8/2024, 7:52 pm
estimated rice per day	Ashajyothi G	23/8/2024, 6:51 pm	Ashajyothi G	23/8/2024, 6:51 pm

## 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.

## Activity 2: Create Dashboard

1. Go to the app → click on the Dashboards tabs.
1. 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.

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.

