

A Crm Application For Wholesale Rice Mill

1. Introduction To Salesforce

Salesforce is a customer relationship management platform, designed to help sell, service, market, analyze, and connect with customers. Salesforce has everything that need to run business from anywhere. Using standard products and features, one can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

A. Creating Developer Account

Sign up for a Salesforce Developer Account through the link <https://developer.salesforce.com/signup>

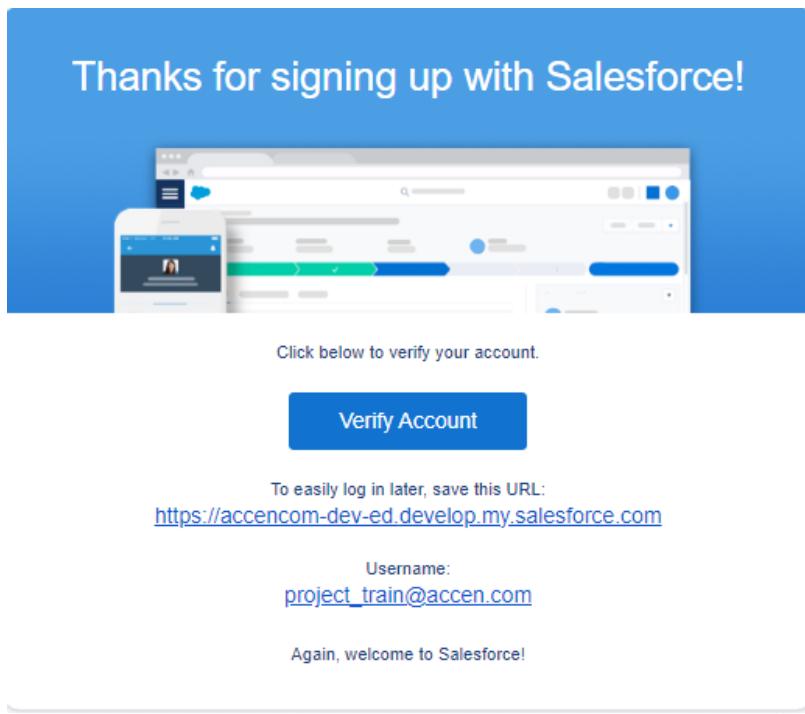


The screenshot shows the "Sign up for your Salesforce Developer Edition" page. It's a form-based registration page with the following fields:

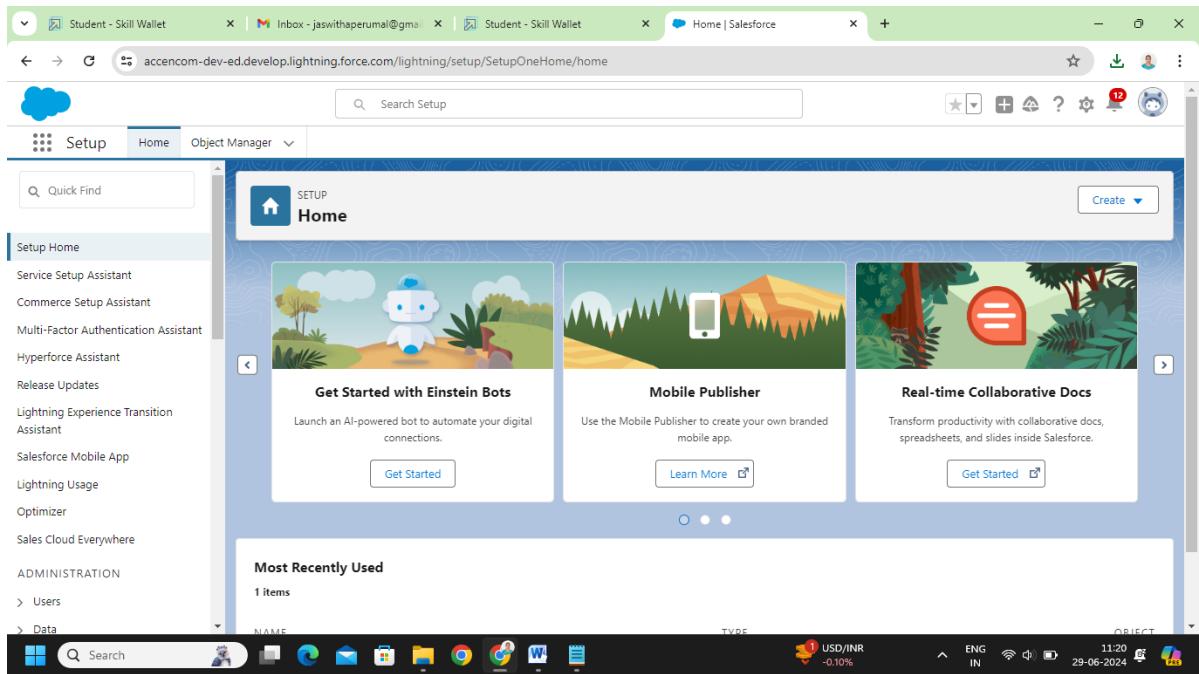
- First Name***: Janutha
- Last Name***: Pramal
- Email***: januthaparumal@gmail.com
- Role***: Developer
- Company***: Accenture
- Country/Region***: India
- State/Province***: Andhra Pradesh
- Postal Code***: 517130
- Username***: project_training@accenture.com
- Username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. Read more about username recommendations.
- I agree to the [Main Service Agreement – Developer Services](#) and [Salesforce Program Agreement](#).
- You, I would like to receive marketing communications regarding Salesforce products, services, and events. I can unsubscribe at any time.
- By registering, you confirm that you agree to the processing of your personal data by Salesforce as described in the [Privacy Statement](#).
- Sign me Up** button

B. Account Activation

Now verify your developer account by clicking on the verification link sent to your mail.



Create the password and fill the required details. Once done you will be directed to the set up page of salesforce.



2. 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. To create an object from the setup page, Click on Object Manager -Click on Create - Click on Custom Object. On Custom object defining page, enter the label name, plural label name, click on Allow reports, Allow search. Click on Save.

The screenshot shows the Salesforce Object Manager interface. The page title is "Object Manager | Salesforce". The main content area displays a table of standard objects with columns: Label, API Name, Type, Description, and Last Modified. The "Asset" row is selected, and a context menu is open, showing options like "Custom Object" and "Custom Object from Spreadsheet".

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Address	Address	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment Category	AppointmentCategory	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		
Appointment Invitee	AppointmentInvitee	Standard Object		
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object		
Asset	Asset	Standard Object		

A. Create Supplier Object

Create supplier object by filling with these details:

label name → supplier

Plural label name → suppliers

Record Name → supplier Name

Data Type → Text

Select Allow reports and Track Field History and allow search

Save the object.

Screenshot of the Salesforce Setup interface showing the creation of a new custom object named "supplier".

The "Custom Object Definition Edit" page displays the following details:

- Custom Object Information:**
 - Label: supplier
 - Plural Label: supplier
 - Example: Account
 - Example: Accounts
 - Starts with vowel sound:
- Object Name:** supplier
- Description:** (Empty text area)

A message at the top states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles." Buttons for Save, Save & New, and Cancel are available.

The "Optional Features" section includes:

- Allow Reports:
- Allow Activities:
- Track Field History:
- Allow in Chatter Groups:
- Enable Licensing:

The "Object Classification" section includes:

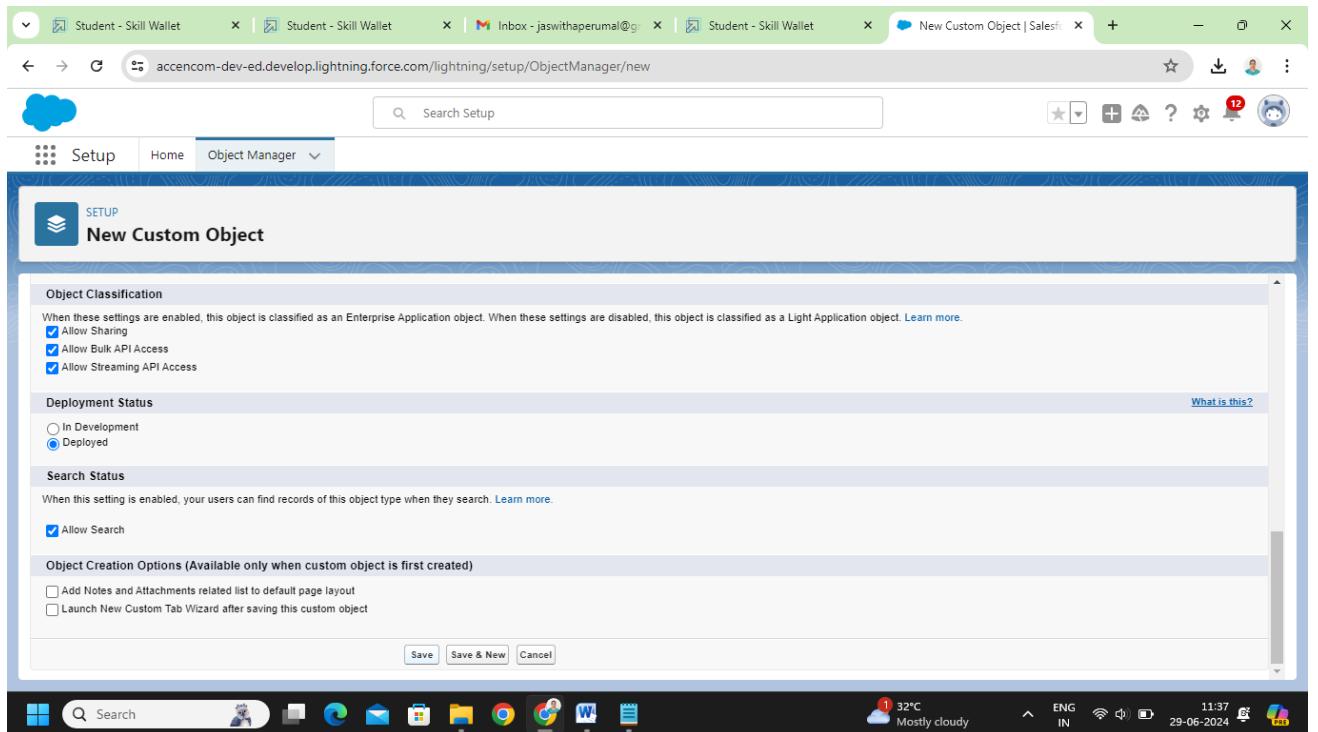
- Allow Sharing:
- Allow Bulk API Access:
- Allow Streaming API Access:

The "Deployment Status" section shows:

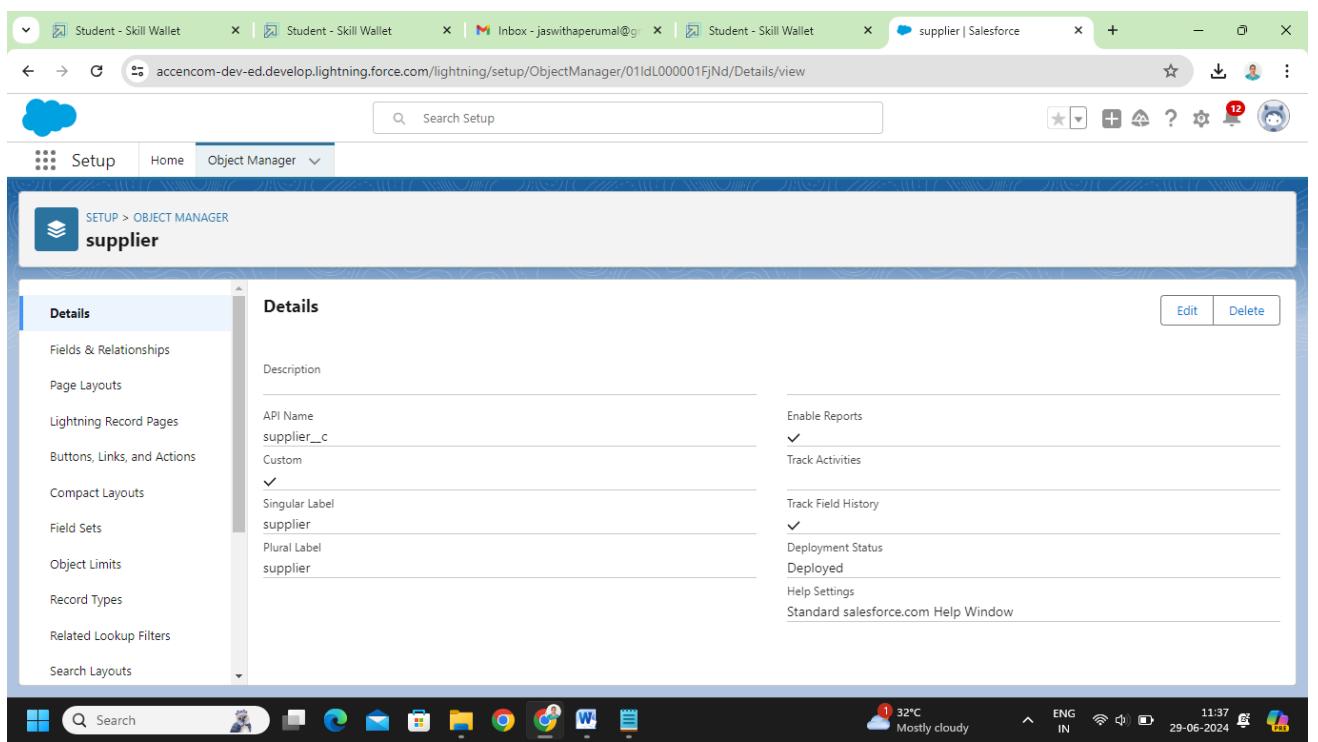
- In Development:
- Deployed:

The "Search Status" section includes the note: "When this setting is enabled, your users can find records of this object type when they search." A "Learn more" link is provided.

The browser status bar at the bottom shows: 32°C Mostly cloudy, ENG IN, 11:36, 29-06-2024.



You can see the object details.



B. Create Rice Mill Object

Create rice mill object by filling with these details:

label name→ rice mill

Plural label name→ rice mills

Record Name → rice mill Name

Data Type → Auto Number

Display Format → rice-{000}

Starting number → 1

Select Allow reports and Track Field History and allow search

Save the object.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A specific object named 'rice mill' is being edited. The left sidebar lists various configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main 'Details' tab is active, displaying the following information:

Field	Value
Description	
API Name	rice_mill_c
Custom	✓
Singular Label	rice mill
Plural Label	rice mills
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

C. Create Consumer Objects

Create consumer object by filling with these details:

label name→ consumer

Plural label name→ consumers

Record Name → consumer Name

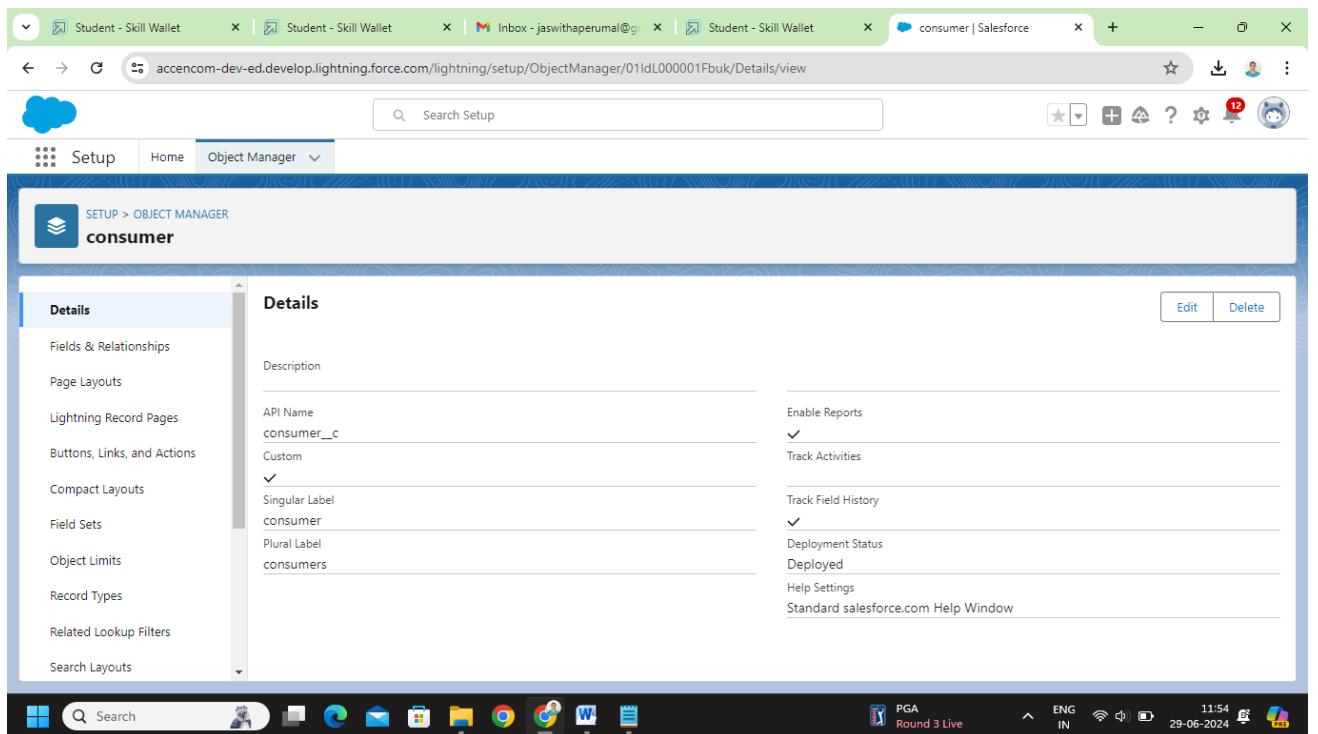
Data Type → Auto Number

Display Format → consumers-{000}

Starting number → 1

Select Allow reports and Track Field History and allow search

Save the object.



D. Create Rice Details Objects

Create rice details object by filling with these details:

label name→ rice details

Plural label name→ rice details

Record Name → rice details Name

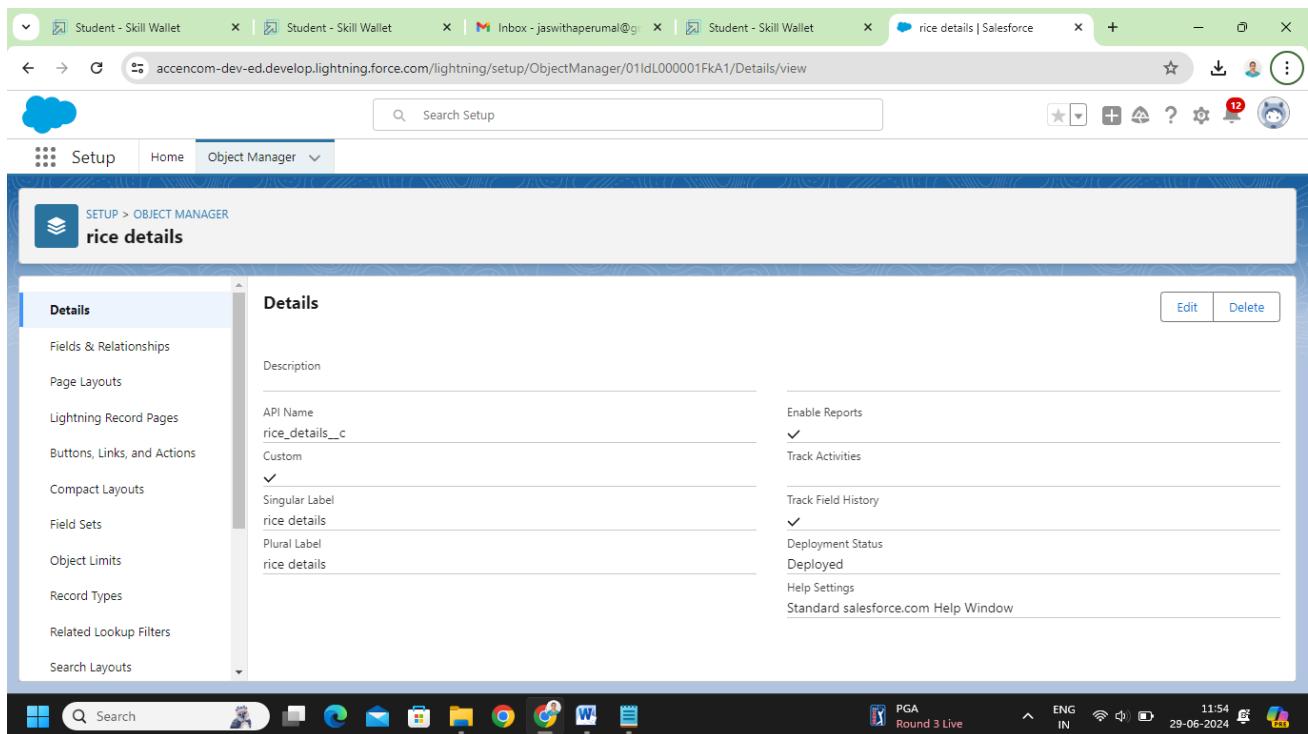
Data Type → Auto Number

Display Format → rice-{000}

Starting number → 1

Select Allow reports and Track Field History and allow search

Save the object.



3. Tabs

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

A. Creating A Custom Tab

To create a Tab, Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab). Select Object >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab . Make sure that the 'Append tab to users' existing personal customizations is checked. Click save.

First let us create the supplier tab. Fill the following details.

Object- supplier

Select the tab style

Next (Add to profiles page) keep it as default

Next (Add to Custom App) uncheck the include tab

Make sure that the 'Append tab to users' existing personal customizations is checked

Click save

The screenshot shows the Salesforce Setup interface with the tabs bar at the top. The active tab is 'Tabs' under the 'User Interface' category. The main content area displays the 'Custom Tabs' section, which includes sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs'. Each section has a 'New' button and a 'What Is This?' link. A search bar and a help link are also present.

This screenshot shows the 'Step 1. Enter the Details' page of the 'Custom Tab Wizard'. The title bar indicates 'Step 1 of 3'. The page asks to choose a custom object for the tab. It features a dropdown menu for 'Object' set to 'supplier', a 'Tab Style' selector with 'Bell' selected, and a 'Splash Page Custom Link' dropdown set to 'None'. There is also a text input field for a 'Description'. Navigation buttons 'Next' and 'Cancel' are at the bottom right.

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The main title is 'New Custom Object Tab'. The sub-step is 'Step 2. Add to Profiles'. It asks to choose user profiles for the new custom tab. A radio button is selected for 'Apply one tab visibility to all profiles' (Default On). Below this is a table mapping profiles to tab visibility. The table includes rows for Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, B2B Reordering Portal Buyer Profile, Contract Manager, and Cross Org Data Proxy User, all set to 'Default On'.

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The main title is 'Step 3. Add to Custom Apps'. It asks to choose custom apps for the new custom tab. A checkbox labeled 'Include Tab' is checked. Below is a table listing various standard and custom apps, each with an unchecked checkbox next to it. The apps listed include Platform (standard__Platform), Sales (standard__Sales), Service (standard__Service), Marketing CRM Classic (standard__Marketing), Sample Console (standard__ServiceConsole), High Volume Customer Portal User, Authenticated Website User, App Launcher (standard__AppLauncher), Community (standard__Community), and Site.com (standard__Sites).

B. Creating Remaining Tabs

Create the rice mill tab. Fill the following details.

Object- rice mill

Select the tab style

Next (Add to profiles page) keep it as default

Next (Add to Custom App) uncheck the include tab

Make sure that the 'Append tab to users' existing personal customizations is checked

Click save

Create the consumer tab. Fill the following details.

Object- consumer

Select the tab style

Next (Add to profiles page) keep it as default

Next (Add to Custom App) uncheck the include tab

Make sure that the 'Append tab to users' existing personal customizations is checked

Click save

Create the rice details tab. Fill the following details.

Object- rice details

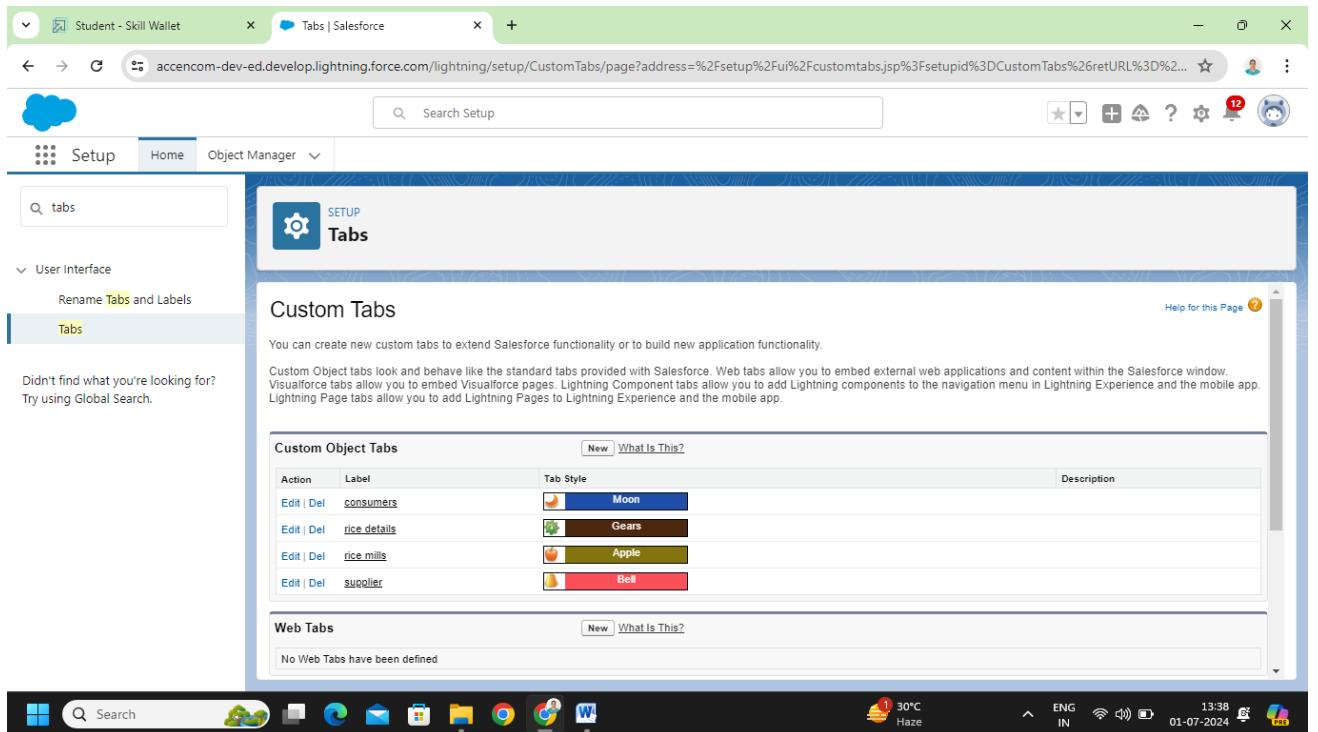
Select the tab style

Next (Add to profiles page) keep it as default

Next (Add to Custom App) uncheck the include tab

Make sure that the 'Append tab to users' existing personal customizations is checked

Click save



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 users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

A. Create A Lightning App

Go to setup page, then search “app manager” in quick find. Select “app manager” and click on New lightning App. Fill the app name in app details as MY RICE, click Next. At ‘App option page’ keep it as default. Click Next and for ‘Utility Items’ keep it as default and click Next. Now, upload a photo that is related to your app. To add Navigation Items, select the items (supplier, rice mill, consumer , Rice details) from the search bar and move it using the arrow button and click Next. To Add User Profiles, search profiles (System administrator) in the search bar and click on the arrow button, then click on save & finish.

Screenshot of the Lightning Experience App Manager (Setup) showing the list of available apps.

Lightning Experience App Manager

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name	Developer Name	Description	Last Modified	Type
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	28/06/2024, 12:27 pm	Classic
2 Analytics Studio	Insights	Discover and manage business solutions designed for your in...	28/06/2024, 12:27 pm	Classic
3 App Launcher	AppLauncher	App Launcher tabs	28/06/2024, 12:27 pm	Classic
4 Automation	FlowsApp	Automate business processes and repetitive tasks.	28/06/2024, 12:34 pm	Lightning
5 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your in...	28/06/2024, 12:31 pm	Lightning
6 Community	Community	Salesforce CRM Communities	28/06/2024, 12:27 pm	Classic
7 Content	Content	Salesforce CRM Content	28/06/2024, 12:27 pm	Classic
8 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage...	28/06/2024, 12:27 pm	Lightning
9 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	28/06/2024, 12:27 pm	Lightning
10 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	28/06/2024, 12:27 pm	Lightning
11 Marketing.CRM.Clas...	Marketing	Track sales and marketing efforts with CRM objects.	28/06/2024, 12:27 pm	Classic

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

- *App Name: MY RICE
- *Developer Name: MY_RICE
- Description: Enter a description

App Branding

- Image: 
- Primary Color Hex: #0070D2

Next

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App Manager | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

New Lightning App

App Options

Navigation and Form Factor !

* Navigation Style
 Standard navigation
 Console navigation

* Supported Form Factors
 Desktop and phone
 Desktop
 Phone

Setup and Personalization !

Setup Experience
 Setup (full set of Setup options)
 Service Setup

App Personalization Settings

Disable end user personalization of nav items in this app
 Disable temporary tabs for items outside of this app
 Use Omni-Channel sidebar

Back Next

9 Digital Experiences SalesforceCMS Manage content and media for all of your sites. 28/06/2024, 12:27 pm Lightning

10 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 28/06/2024, 12:27 pm Lightning

11 Marketing.CRM.Clas... Marketing Track sales and marketing efforts with CRM objects. 28/06/2024, 12:27 pm Classic

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App Manager | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

New Lightning App

Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app.

Add Utility Item Utility Bar Alignment Default

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.

Back Next

9 Digital Experiences SalesforceCMS Manage content and media for all of your sites. 28/06/2024, 12:27 pm Lightning

10 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 28/06/2024, 12:27 pm Lightning

11 Marketing.CRM.Clas... Marketing Track sales and marketing efforts with CRM objects. 28/06/2024, 12:27 pm Classic

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App Manager | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

New Lightning App

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	Selected Items
rice	supplier
Price Books	rice mills
	consumers
	rice details

Back Next

9 Digital Experiences SalesforceCMS Manage content and media for all of your sites. 28/06/2024, 12:27 pm Lightning

10 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 28/06/2024, 12:27 pm Lightning

11 Marketing.CRM.Clas... Marketing Track sales and marketing efforts with CRM objects. 28/06/2024, 12:27 pm Classic

User Profiles

Choose the user profiles that can access this app.

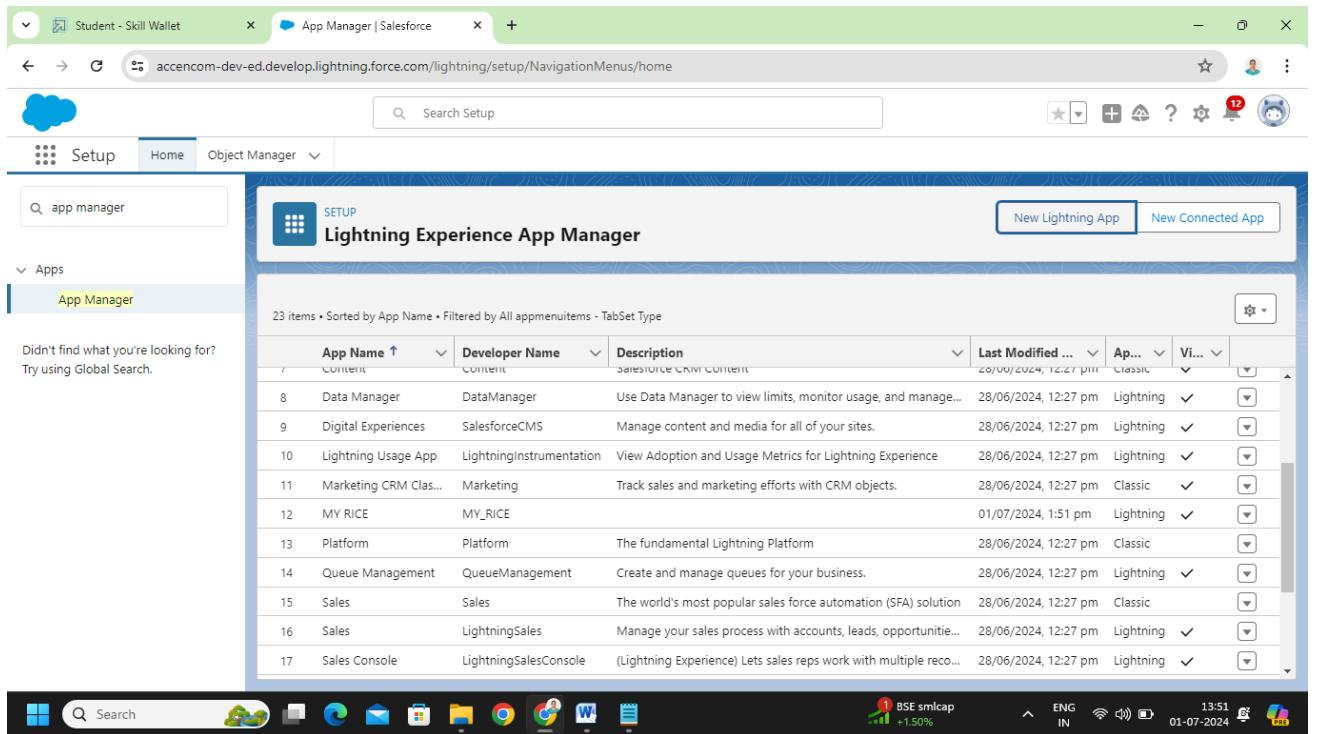
Available Profiles	Selected Profiles
system	System Administrator

Back Save & Finish

9 Digital Experiences SalesforceCMS Manage content and media for all of your sites. 28/06/2024, 12:27 pm Lightning

10 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 28/06/2024, 12:27 pm Lightning

11 Marketing.CRM.Clas... Marketing Track sales and marketing efforts with CRM objects. 28/06/2024, 12:27 pm Classic



5. Fields

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.

A. Creating The Number Field In Rice Details Object

Go to the setup page and click on object manager. From drop down click edit for rice details object. Click on fields & relationship and click on New. Select Data type as “Number” and click Next. Give the Field Label as “rice distributed” and length as “5”. Field Name will be auto populated, and click on Next- Next and then Save.

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Object Manager | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

Object Manager

5 Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Cart Item Price Adjustment	CartItemPriceAdjustment	Standard Object			
Price Book	Pricebook2	Standard Object			
Price Book Entry	PricebookEntry	Standard Object			
rice details	rice_details_c	Custom Object		29/06/2024	✓
rice mill	rice_mill_c	Custom Object		29/06/2024	✓

https://accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home#setup/ObjectManager/01l0L00001FkA1/Details/page?nodeId=ObjectManager&address=%2F01l0L00001FkA1%2Fe%3FretURL%3D%252Fsetup%252F...

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rice details | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01l0L00001FkA1/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice details

Details

Fields & Relationships

4 Items, Sorted by Field Label

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 details Name	Name	Auto Number	✓	

Search

NIFTY +0.49%

ENG IN 13:58 01-07-2024

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rice details | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FkA1/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice details

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

External Lookup Relationship

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Checkbox

Allows users to select a True (checked) or False (unchecked) value.

Currency

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Date

Allows users to enter a date or pick a date from a popup calendar.

DateTime

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the DateTime field.

Email

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Geolocation

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Number

Allows users to enter any number. Leading zeros are removed.

Percent

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Phone

Allows users to enter any phone number. Automatically formats it as a phone number.

Picklist

Allows users to select a value from a list you define.

Picklist (Multi-Select)

Allows users to select multiple values from a list you define.

Text

Allows users to enter any combination of letters and numbers.

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rice details | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FkA1/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice details

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

New Custom Field

Step 2. Enter the details Step 2 of 4

Help for this Page ?

Previous Next Cancel

Field Label i

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length Decimal Places

Number of digits to the left of the decimal point i

Number of digits to the right of the decimal point

Description

Help Text

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rice details | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FkA1/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice details

New Custom Field

Step 3 of 4

Help for this Page

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

Field Label: rice distributed
Data Type: Number
Field Name: rice_distributed
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

29°C Haze ENG IN 01-07-2024

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rice details | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FkA1/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice details

New Custom Field

Step 4 of 4

Help for this Page

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

Field Label: rice distributed
Data Type: Number
Field Name: rice_distributed
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field
 rice details Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

29°C Haze ENG IN 01-07-2024

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for Student - Skill Wallet, rice details | Salesforce, and accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FkA1/FieldsAndRelationships/view. Below the navigation is a search bar labeled "Search Setup". The main content area has a blue header "SETUP > OBJECT MANAGER" with a "rice details" icon. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The "Fields & Relationships" section is currently active, showing a table with 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 details Name	Name	Auto Number	✓	
rice distributed	rice_distributed_c	Number(5, 0)		▼

B. 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

Go to the setup page and click on object manager. From drop down click edit for rice details object. Click on fields & relationship - click on New. Select “Master-Detail relationship” as data type and click Next. Select the related object “ supplier ” and click next. Give Field Label as “supplier Name” and click Next. Click Next, Next and then Save & New.

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Object Manager | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

Object Manager

5 Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Cart Item Price Adjustment	CartItemPriceAdjustment	Standard Object			
Price Book	Pricebook2	Standard Object			
Price Book Entry	PricebookEntry	Standard Object			
rice details	rice_details_c	Custom Object		29/06/2024	✓
rice mill	rice_mill_c	Custom Object		29/06/2024	✓

Edit Delete

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rice details | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FkA1/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice details

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

Fields & Relationships

5 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
rice details Name	Name	Auto Number	✓	
rice distributed	rice_distributed_c	Number(5, 0)		

Screenshot of the Salesforce Setup interface showing the 'rice details' object details page.

The left sidebar shows the 'Fields & Relationships' section selected. The main content area displays the 'Data Type' configuration for the 'rice details' object.

Data Type:

- None Selected
- Auto Number
- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency

Helpful links and notes are provided for each data type option.

Screenshot of the Salesforce Setup interface showing the 'rice details' object relationship configuration.

The left sidebar shows the 'Fields & Relationships' section selected. The main content area displays the 'New Relationship' configuration for the 'rice details' object.

Step 2. Choose the related object:

Select the other object to which this object is related.

Related To: supplier

Helpful links and notes are provided for the relationship configuration.

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rice details | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FkA1/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice details

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

New Relationship

Step 3. Enter the label and name for the lookup field

Step 3 of 6

Help for this Page

Field Label: supplier Name

Field Name: supplier_Name

Description:

Help Text:

Child Relationship Name: rice_details

Sharing Setting:
Select the minimum access level required on the Master record to create, edit, or delete related Detail records:
 Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

Previous Next Cancel

Student - Skill Wallet

rice details | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FkA1/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice details

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

New Relationship

Step 4. Establish field-level security for reference field

Step 4 of 6

Help for this Page

Field Label: supplier Name
Data Type: Master-Detail
Field Name: supplier_Name
Description:

These are the field-level settings for a Master-Detail relationship. They cannot be changed.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	✓	□
Analytics Cloud Security User	✓	□
Authenticated Website	✓	□
Authenticated Website	✓	□
B2B Reordering Portal Buyer Profile	✓	□

Previous Next Cancel

The screenshot shows the Salesforce Setup interface for creating a new relationship for the 'rice details' object. The 'Fields & Relationships' tab is selected in the sidebar.

Step 5. Add reference field to Page Layouts

- Field Label: supplier Name
- Data Type: Master-Detail
- Field Name: supplier_Name
- Description:

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Field	Page Layout Name
<input checked="" type="checkbox"/>	rice details Layout

Step 6. Add custom related lists

- Field Label: supplier Name
- Data Type: Master-Detail
- Field Name: supplier_Name
- Description:

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label
rice details

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List	Page Layout Name
<input checked="" type="checkbox"/>	supplier Layout

Append related list to users' existing personal customizations

Follow the same initial steps for the object "rice mill". Select the related object “ rice mill ” and click Next. Give Field Label as “rice mill 1(one)” and click Next. Click Next, Next and then Save.

The screenshot shows the Salesforce Object Manager interface for creating a new custom field. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main panel is titled 'rice details' under 'SETUP > OBJECT MANAGER'. The 'Fields & Relationships' tab is selected. A sub-section titled 'Data Type' is displayed, showing options for 'None Selected', 'Auto Number', 'Formula', 'Roll-Up Summary', 'Lookup Relationship', and 'Master-Detail Relationship'. The 'Master-Detail Relationship' option is selected, and its detailed description is visible. The status bar at the bottom shows system information including 'Nifty smicap +1.38%', 'ENG IN', and the date '01-07-2024'.

Specifying the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

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rice details | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FkA1/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice details

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

New Relationship

Step 3. Enter the label and name for the lookup field

Step 3 of 6

Help for this Page

Field Label: rice mill 1

Field Name: rice_mill_1

Description:

Help Text:

Child Relationship Name: rice_details

Sharing Setting: Select the minimum access level required on the Master record to create, edit, or delete related Detail records:
 Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

Previous Next Cancel

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rice details | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FkA1/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice details

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

New Relationship

Step 4. Establish field-level security for reference field

Step 4 of 6

Help for this Page

Field Label: rice mill 1

Data Type: Master-Detail

Field Name: rice_mill_1

Description:

These are the field-level settings for a Master-Detail relationship. They cannot be changed.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Previous Next Cancel

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rice details | Salesforce

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Setup Home Object Manager

SETUP > OBJECT MANAGER

rice details

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

rice details New Relationship

Step 5. Add reference field to Page Layouts Step 5 of 6

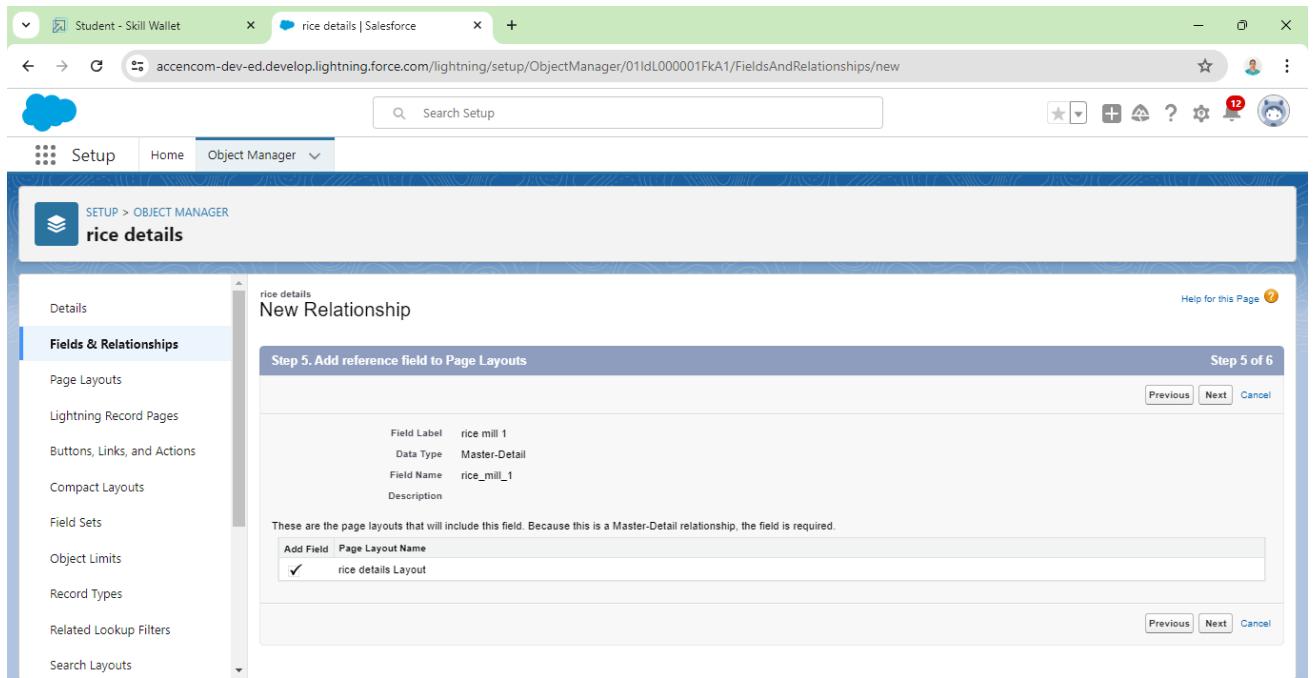
Field Label: rice mill 1
Data Type: Master-Detail
Field Name: rice_mill_1
Description:

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Field Page Layout Name
 rice details Layout

Help for this Page

Previous Next Cancel



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rice details | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FkA1/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice details

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

rice details New Relationship

Step 6. Add custom related lists Step 6 of 6

Field Label: rice mill 1
Data Type: Master-Detail
Field Name: rice_mill_1
Description:

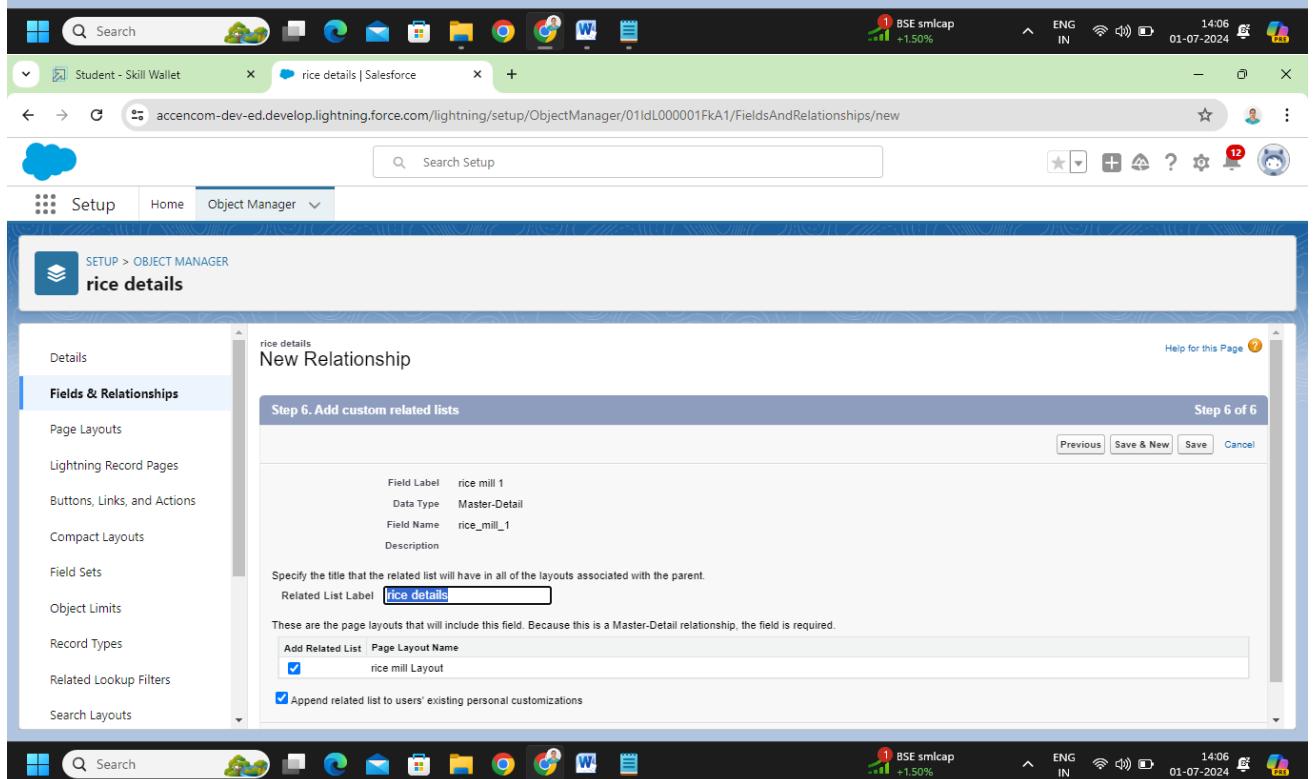
Specify the title that the related list will have in all of the layouts associated with the parent.
Related List Label:

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List Page Layout Name
 rice mill Layout
 Append related list to users' existing personal customizations

Help for this Page

Previous Save & New Save Cancel



The screenshot shows the Salesforce Setup interface for the 'rice details' object. The left sidebar has 'Fields & Relationships' selected. The main area displays a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
rice details Name	Name	Auto Number		✓
rice distributed	rice_distributed__c	Number(5, 0)		✓
rice mill 1	rice_mill_1__c	Master-Detail(rice mill)		✓
supplier Name	supplier_Name__c	Master-Detail(supplier)		✓

C. 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, go to the setup page and click on object manager. From drop down click edit for consumer object. Click on fields & relationship and click on New. Select “Master-Detail relationship” as data type and click Next. Select the related object “ rice mill”. Give Field Label as “rice mill name” and click Next. Click Next >> Next >> Save.

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Object Manager | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

Object Manager

4 Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
consumer	consumer__c	Custom Object		29/06/2024	✓
Consumption Rate	ConsumptionRate	Standard Object			
Consumption Schedule	ConsumptionSchedule	Standard Object			
Product Consumption Schedule	ProductConsumptionSchedule	Standard Object			

consu

Schema Builder

Create

Edit

Delete

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consumer | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001Fbuk/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

Fields & Relationships

4 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
consumer Name	Name	Auto Number		✓
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

ESP - GEO Game score

ENG IN

14:12 01-07-2024

Screenshot of the Salesforce Setup interface showing the Object Manager for the 'consumer' object. The 'Fields & Relationships' tab is selected. A modal window is open for creating a new field. The 'Data Type' section is visible, with 'Master-Detail Relationship' selected. Other options shown include None Selected, Auto Number, Formula, Roll-Up Summary, Lookup Relationship, and Master-Detail Relationship.

Screenshot of the Salesforce Setup interface showing the Object Manager for the 'consumer' object. The 'Fields & Relationships' tab is selected. A modal window is open for creating a new relationship. Step 2 of 6 is displayed, titled 'Choose the related object'. The user has selected 'rice mill' from the 'Related To' dropdown. Navigation buttons for 'Previous', 'Next', and 'Cancel' are visible at the bottom right of the modal.

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consumer | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001Fbuk/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

consumer New Relationship

Step 3. Enter the label and name for the lookup field Step 3 of 6

Field Label: rice mill name

Field Name: rice_mill_name

Description:

Help Text:

Child Relationship Name: consumers

Sharing Setting: Select the minimum access level required on the Master record to create, edit, or delete related Detail records:
 Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

Help for this Page

Previous Next Cancel

Student - Skill Wallet

consumer | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001Fbuk/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

consumer New Relationship

Step 4. Establish field-level security for reference field Step 4 of 6

Field Label: rice mill name
Data Type: Master-Detail
Field Name: rice_mill_name
Description:

These are the field-level settings for a Master-Detail relationship. They cannot be changed.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	✓	□
Analytics Cloud Security User	✓	□
Authenticated Website	✓	□
Authenticated Website	✓	□
B2B Reordering Portal Buyer Profile	✓	□

Help for this Page

Previous Next Cancel

Student - Skill Wallet

consumer | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001Fbuk/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

Details

Fields & Relationships

- Page Layouts
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- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

consumer New Relationship

Step 5. Add reference field to Page Layouts Step 5 of 6

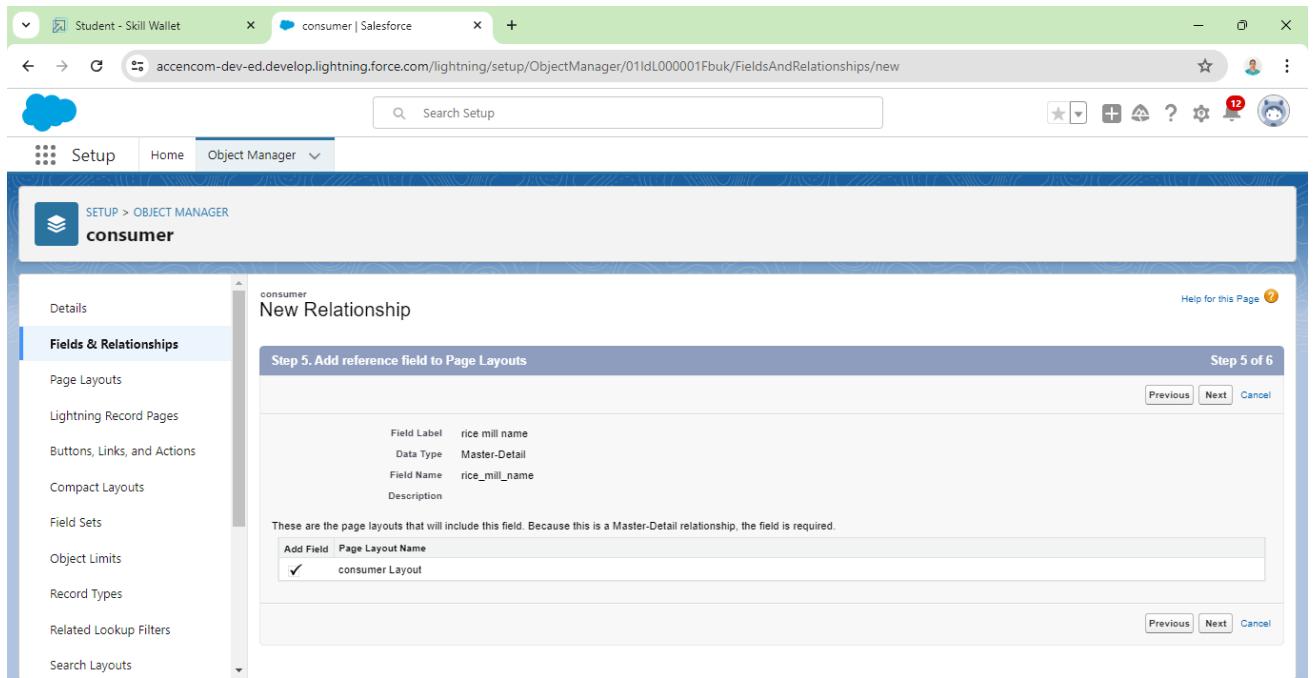
Field Label: rice mill name
Data Type: Master-Detail
Field Name: rice_mill_name
Description:

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Field Page Layout Name
 consumer Layout

Help for this Page

Previous Next Cancel



Student - Skill Wallet

consumer | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001Fbuk/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

consumer New Relationship

Step 6. Add custom related lists Step 6 of 6

Field Label: rice mill name
Data Type: Master-Detail
Field Name: rice_mill_name
Description:

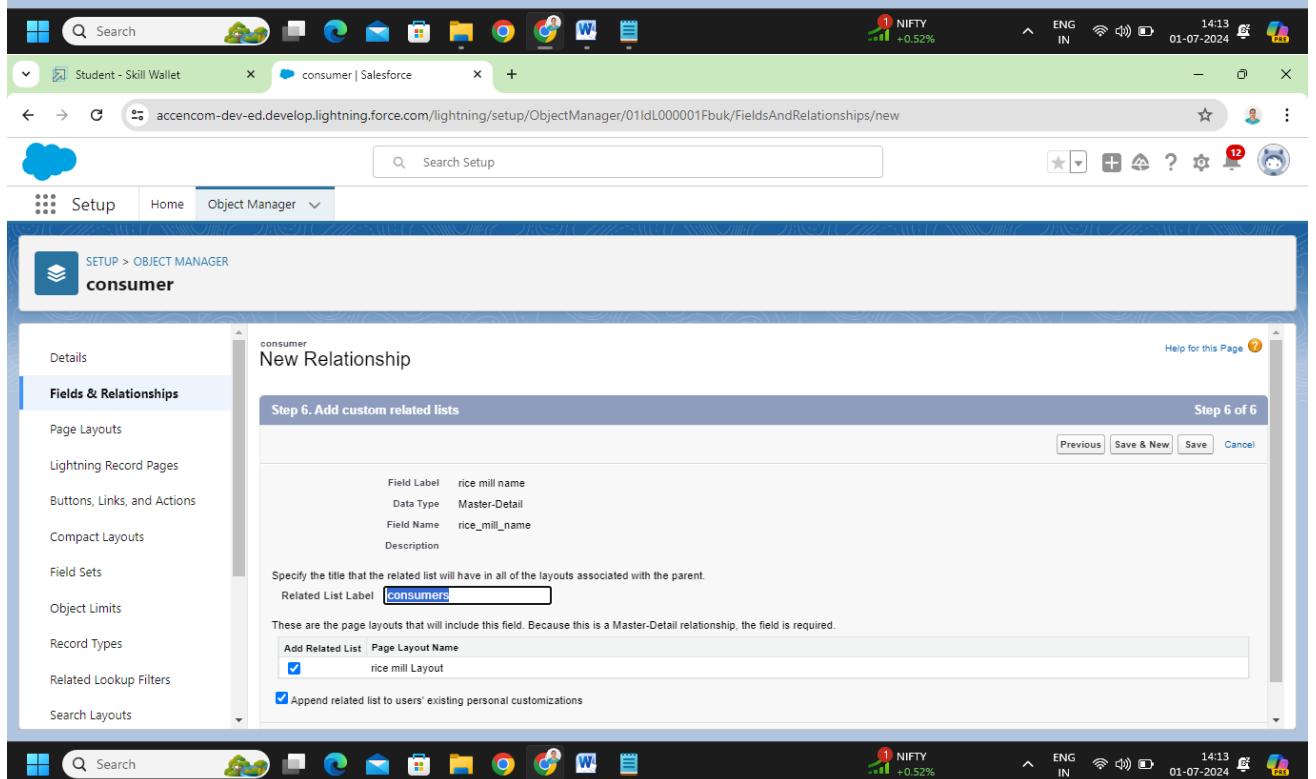
Specify the title that the related list will have in all of the layouts associated with the parent.
Related List Label:

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List Page Layout Name
 rice mill Layout
 Append related list to users' existing personal customizations

Help for this Page

Previous Save & New Save Cancel



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

- Header:** Student - Skill Wallet, consumer | Salesforce, acacom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001Fbuk/FieldsAndRelationships/view
- Top Bar:** Search Setup, various icons for navigation and settings.
- Left Sidebar:** Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts.
- Table:** Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
consumer Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
rice mill name	rice_mill_name__c	Master-Detail(rice mill)		✓
- Bottom:** Windows taskbar with various icons and system status.

D. 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.

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

For supplier – rice details:

Go to setup, click on Object Manager and type object name(supplier) in search bar, then click on the object. Now click on “Fields & Relationships” and click on New. Select the data type as “Rollup summary”, and click Next. Give the Field label as “ sum of rice distributed ”, Field Name will be Auto generated, and click Next. Select the summarized object as “ rice details ”. Select the Rollup type as “sum”. Select the field to aggregate as “ rice distributed ”, and click Next >>Next >>Save.

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Object Manager | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

Object Manager

1 items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
supplier	supplier_c	Custom Object		29/06/2024	✓

Edit Delete

https://accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home#setup/ObjectManager/01lL000001FjNd/Details/page?nodeId=ObjectManager&address=%2F01lL000001FjNd%2Fe%3Fr?url%3D%252Fsetup%252FO...

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supplier | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lL000001FjNd/FieldsAndRelationships/view

Setup Home Object Manager

supplier

SETUP > OBJECT MANAGER

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

Fields & Relationships

4 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
supplier Name	Name	Text(80)	✓	

Quick Find New Deleted Fields Field Dependencies Set History Tracking

1 BSE smcap +1.52%

ENG IN 14:27 01-07-2024

Student - Skill Wallet

supplier | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FjNd/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER supplier

New Custom Field

Step 1. Choose the field type

Help for this Page

Step 1

Next Cancel

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Help for this Page

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supplier | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FjNd/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER supplier

New Custom Field

Step 2. Enter the details

Help for this Page

Step 2 of 5

Previous Next Cancel

Field Label: sum of rice distributed

Field Name: sum_of_rice_distributed

Description:

Help Text:

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

Help for this Page

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supplier | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FjNd/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER supplier

New Custom Field

Step 3 of 5

Help for this Page

Select Object to Summarize

Master Object: supplier
Summarized Object: rice details

Select Roll-Up Type

COUNT (radio button)
SUM (radio button, selected)
MIN
MAX

Field to Aggregate: rice distributed

Filter Criteria

All records should be included in the calculation

Previous Next Cancel

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supplier | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FjNd/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER supplier

New Custom Field

Step 4 of 5

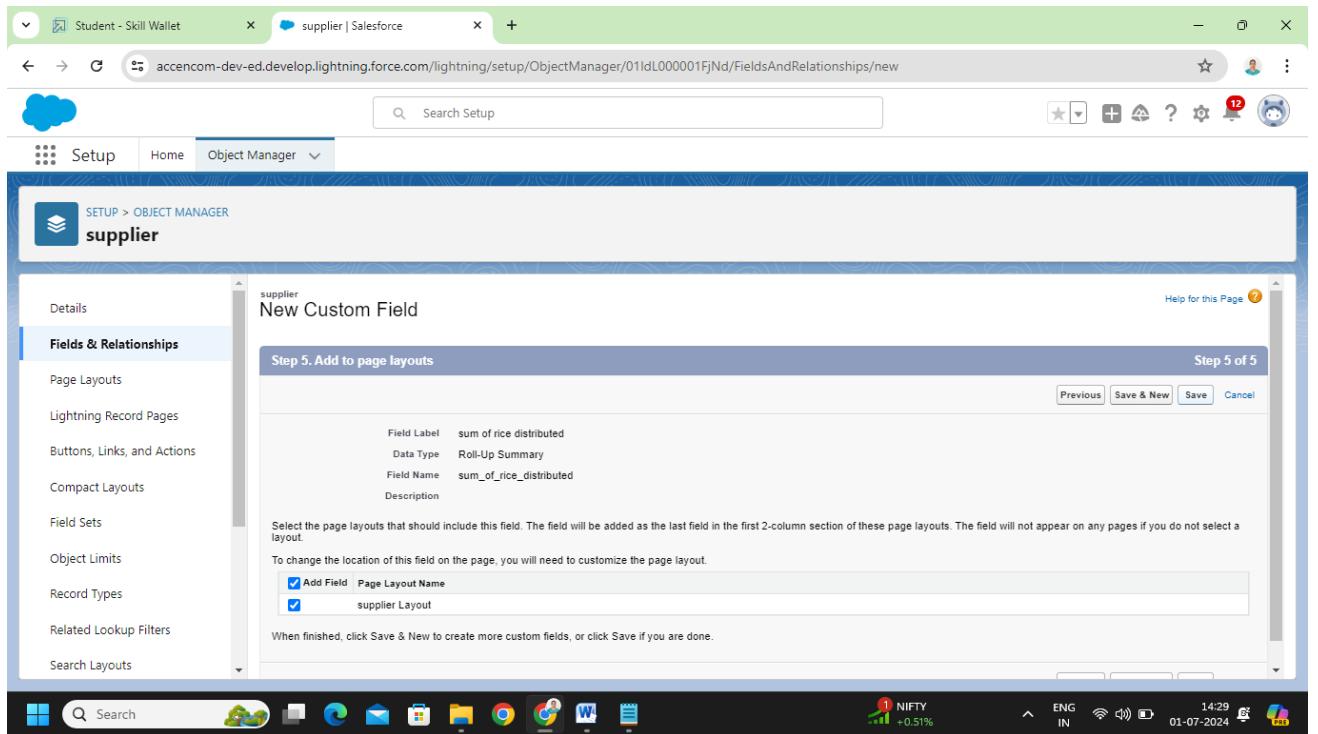
Help for this Page

Field Label: sum of rice distributed
Data Type: Roll-Up Summary
Field Name: sum_of_rice_distributed
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

1 NIFTY +0.51% ENG IN 14:29 01-07-2024



For rice mill – rice details:

Go to setup, click on Object Manager and type object name(rice mill) in search bar, then click on the object. Now click on “Fields & Relationships” and click on New. Select the data type as “Rollup summary ”,and click Next. Give the Field label as “ rice distributed to shops ”,Field Name will be Auto generated, and click Next. Select the summarized object as “ rice details ”. Select the Rollup type as “sum”. Select the field to aggregate as “ rice distributed ”, and click Next >> Next >> Save.

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Object Manager | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

SETUP Object Manager

5 Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Cart Item Price Adjustment	CartItemPriceAdjustment	Standard Object			
Price Book	Pricebook2	Standard Object			
Price Book Entry	PricebookEntry	Standard Object			
rice details	rice_details_c	Custom Object		29/06/2024	✓
rice mill	rice_mill_c	Custom Object		29/06/2024	✓

Edit
Delete

Student - Skill Wallet

rice mill | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dL000001FecX/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice mill

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

Fields & Relationships

4 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
rice mill Name	Name	Auto Number		✓

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rice mill | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FecX/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER
rice mill

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

rice mill
New Custom Field

Step 1. Choose the field type

Help for this Page ?

Next Cancel

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a relationship of parent child relationship between the object and the object selected above. This relationship can be used to access the object's data from the parent object's page layout or report.

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rice mill | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FecX/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER
rice mill

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

rice mill
New Custom Field

Step 2. Enter the details

Help for this Page ?

Previous Next Cancel

Field Label [i]

Field Name [i]

Description

Help Text

Auto add to custom report type Add this field to existing custom report types that contain this entity [i]

Previous Next Cancel

1 NIFTY +0.51% ENG IN 14:30 01-07-2024

Search

1 29°C Haze

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rice mill | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FecX/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice mill

New Custom Field

Step 3 of 5

Help for this Page ?

Previous Next Cancel

Select Object to Summarize

Master Object: rice mill
Summarized Object: rice details

Select Roll-Up Type

COUNT (radio button)
SUM (radio button, selected)
MIN
MAX

Field to Aggregate: rice distributed

Filter Criteria

All records should be included in the calculation

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rice mill | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FecX/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice mill

New Custom Field

Step 4 of 5

Help for this Page ?

Previous Next Cancel

Field Label: rice distributed to shops
Data Type: Roll-Up Summary
Field Name: rice_distributed_to_shops
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

ENG IN 29°C Haze 14:31 01-07-2024

The screenshot shows the Salesforce Setup interface for the 'rice mill' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'rice mill New Custom Field' and is on 'Step 5. Add to page layouts'. The field details are: Field Label: 'rice distributed to shops', Data Type: 'Roll-Up Summary', Field Name: 'rice_distributed_to_shops', and Description: blank. Under 'Page Layouts', 'rice mill Layout' is selected. Buttons at the bottom include 'Add Field', 'Page Layout Name', 'Save & New', 'Save', and 'Cancel'. The top navigation bar shows tabs for Student - Skill Wallet, rice mill | Salesforce, and a search bar.

Note : create the field as “ rice taken by shops in kgs” using number datatype in consumer object

Student - Skill Wallet

Object Manager | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

Object Manager

4 Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
consumer	consumer__c	Custom Object		29/06/2024	✓
Consumption Rate	ConsumptionRate	Standard Object			
Consumption Schedule	ConsumptionSchedule	Standard Object			
Product Consumption Schedule	ProductConsumptionSchedule	Standard Object			

consu

Schema Builder

Create

Edit

Delete

Student - Skill Wallet

consumer | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dL000001Fbuk/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

Fields & Relationships

4 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
consumer Name	Name	Auto Number		✓
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
rice mill name	rice_mill_name__c	Master-Detail(rice mill)		✓

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

29°C Haze

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14:34

01-07-2024

The screenshot shows the Salesforce Object Manager Fields & Relationships page for the 'consumer' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, Buttons, etc. The main content area displays a list of field types with their descriptions:

Field Type	Description
External Lookup Relationship	The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
Checkbox	Allows users to select a True (checked) or False (unchecked) value.
Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date	Allows users to enter a date or pick a date from a popup calendar.
DateTime	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the DateTime field.
Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number	Allows users to enter any number. Leading zeros are removed.
Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist	Allows users to select a value from a list you define.
Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
Text	Allows users to enter any combination of letters and numbers.

The screenshot shows the Step 2: Enter the details page for creating a new custom field. The field label is set to 'rice taken by shops in kgs'. The length is set to 18, and the decimal places are set to 0. The field name is 'rice_taken_by_shops_in_kgs'. The page also includes fields for Description and Help Text, both of which are currently empty.

Step 2 of 4

Previous Next Cancel

Field Label: rice taken by shops in kgs

Length: 18

Decimal Places: 0

Field Name: rice_taken_by_shops_in_kgs

Description:

Help Text:

Student - Skill Wallet consumer | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001Fbuk/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

consumer New Custom Field

Step 3. Establish field-level security Step 3 of 4

Help for this Page

Field Label: rice taken by shops in kgs
Data Type: Number
Field Name: rice_taken_by_shops_in_kgs
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Previous Next Cancel

Student - Skill Wallet consumer | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001Fbuk/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

consumer New Custom Field

Step 4. Add to page layouts Step 4 of 4

Help for this Page

Field Label: rice taken by shops in kgs
Data Type: Number
Field Name: rice_taken_by_shops_in_kgs
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field
 consumer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

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

- Tab Bar:** Student - Skill Wallet, consumer | Salesforce, accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001Fbuk/FieldsAndRelationships/view
- Header:** Search Setup, Home, Object Manager
- Section:** SETUP > OBJECT MANAGER consumer
- Left Sidebar:** Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts.
- Table:** Fields & Relationships (5 Items, Sorted by Field Label)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
consumer Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
rice mill name	rice_mill_name_c	Master-Detail(rice mill)		✓
rice taken by shops in kgs	rice_taken_by_shops_in_kgs_c	Number(18, 0)		✓
- System Bar:** Search, Start button, Task View, File Explorer, Mail, OneDrive, Edge, Google Chrome, File, Haze icon, ENG IN, 29°C, 01-07-2024, 14:35, Battery, Network, Volume, Task View.

For rice mill – consumer:

Go to setup, click on Object Manager and type object name(rice mill) in search bar, then click on the object. Now click on “Fields & Relationships” and click on New. Select the data type as “Rollup summary ”,and click Next. Give the Field label as “ rice taken ”,Field Name will be Auto generated, and click Next. Select the summarized object as “ consumer”. Select the Rollup type as “sum”. Select the field to aggregate as “ rice taken in shops ”, and click Next >> Next >> Save.

Student - Skill Wallet

Object Manager | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

Object Manager

5 Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Cart Item Price Adjustment	CartItemPriceAdjustment	Standard Object			
Price Book	Pricebook2	Standard Object			
Price Book Entry	PricebookEntry	Standard Object			
rice details	rice_details_c	Custom Object		29/06/2024	✓
rice mill	rice_mill_c	Custom Object		29/06/2024	✓

Edit
Delete

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Search

Student - Skill Wallet

rice mill | Salesforce

Setup Home Object Manager

rice mill

SETUP > OBJECT MANAGER

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

Fields & Relationships

5 Items, Sorted by Field Label

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)		
rice mill Name	Name	Auto Number	✓	

Search

29°C Haze

ENG IN 14:36 01-07-2024

Student - Skill Wallet

rice mill | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FecX/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER
rice mill

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

rice mill
New Custom Field

Step 1. Choose the field type

Help for this Page ?

Next Cancel

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a relationship of parent child relationship between the object and the object selected in the list. This relationship can be used to display the values of the object in the list.

Student - Skill Wallet

rice mill | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FecX/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER
rice mill

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

rice mill
New Custom Field

Step 2. Enter the details

Help for this Page ?

Previous Next Cancel

Field Label [i]

Field Name [i]

Description

Help Text

Auto add to custom report type Add this field to existing custom report types that contain this entity [i]

Previous Next Cancel

1 29°C Haze ENG IN 14:36 01-07-2024

Student - Skill Wallet

rice mill | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FecX/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice mill

New Custom Field

Step 3 of 5

Help for this Page

Required Information

Previous Next Cancel

Select Object to Summarize

Master Object: rice mill
Summarized Object: consumers

Select Roll-Up Type

COUNT (radio button) SUM (radio button) MIN (radio button) MAX (radio button)

Field to Aggregate: rice taken by shops in kgs

Filter Criteria

All records should be included in the calculation

29°C Haze ENG IN 01-07-2024

Student - Skill Wallet

rice mill | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FecX/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice mill

New Custom Field

Step 4 of 5

Help for this Page

Previous Next Cancel

Field Label: rice taken
Data Type: Roll-Up Summary
Field Name: rice_taken
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

29°C Haze ENG IN 01-07-2024

New Custom Field

Step 5. Add to page layouts

Field Label: rice taken
 Data Type: Roll-Up Summary
 Field Name: rice_taken
 Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 rice mill Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

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)		
rice mill Name	Name	Auto Number	✓	
rice taken	rice_taken_c	Roll-Up Summary (SUM consumer)		

E. Creating Fields In Objects

Creating the number field in rice details object

Go to the setup page, click on object manager. From drop down click edit for rice details object. Click on fields & relationship and click on New. Select Data type as “Number” and click Next. Given the Field Label as “ supplier name ” and length as “ 5 ”. Field Name will be auto populated, and click on Next>> Next >>Save.

Student - Skill Wallet

Object Manager | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

SETUP Object Manager

5 Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Cart Item Price Adjustment	CartItemPriceAdjustment	Standard Object			
Price Book	Pricebook2	Standard Object			
Price Book Entry	PricebookEntry	Standard Object			
rice details	rice_details_c	Custom Object		29/06/2024	✓
rice mill	rice_mill_c	Custom Object		29/06/2024	✓

https://accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home#setup/ObjectManager/01l0L00001FkA1/Details/page?nodeId=ObjectManager&address=%2F01l0L00001FkA1%2Fe%3FretURL%3D%252Fsetup%252F...

Student - Skill Wallet

rice details | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01l0L00001FkA1/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice details

Details

Fields & Relationships

6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
rice details Name	Name	Auto Number	✓	
rice distributed	rice_distributed_c	Number(5, 0)		
rice mill 1	rice_mill_1_c	Master-Detail(rice mill)	✓	
supplier Name	supplier_Name_c	Master-Detail(supplier)	✓	

Search

29°C Haze

ENG IN 14:40 01-07-2024

Student - Skill Wallet

rice details | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001FkA1/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice details

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

External Lookup Relationship

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Checkbox

Allows users to select a True (checked) or False (unchecked) value.

Currency

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Date

Allows users to enter a date or pick a date from a popup calendar.

DateTime

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the DateTime field.

Email

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Geolocation

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Number

Allows users to enter any number. Leading zeros are removed.

Percent

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Phone

Allows users to enter any phone number. Automatically formats it as a phone number.

Picklist

Allows users to select a value from a list you define.

Picklist (Multi-Select)

Allows users to select multiple values from a list you define.

Text

Allows users to enter any combination of letters and numbers.

Student - Skill Wallet

rice details | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001FkA1/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice details

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

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label [i](#)

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length Decimal Places

Number of digits to the left of the decimal point [i](#)

Number of digits to the right of the decimal point

Description

Help Text

Help for this Page [?](#)

Previous Next Cancel

Student - Skill Wallet

rice details | Salesforce

are fields and relationships in s...

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice details

New Custom Field

Step 3 of 4

Help for this Page

Previous Next Cancel

Field Label: supplier name
Data Type: Number
Field Name: supplier_name_1
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Student - Skill Wallet

rice details | Salesforce

are fields and relationships in s...

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice details

New Custom Field

Step 4 of 4

Help for this Page

Previous Save & New Save Cancel

Field Label: supplier name
Data Type: Number
Field Name: supplier_name_1
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 rice details Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Student - Skill Wallet', 'rice details | Salesforce', and a Google search result. The main header has a blue cloud icon, a search bar, and various setup tools. The left sidebar lists 'Details', 'Fields & Relationships' (selected), 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Search Layouts'. The right panel displays the 'Fields & Relationships' section for the 'rice details' object, which contains 7 items sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

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	rice_mill_1__c	Master-Detail(rice mill)		✓
supplier name	supplier_name_1__c	Number(5, 0)		
supplier Name	supplier_Name__c	Master-Detail(supplier)		✓

F. Creating Fields In Rice Mill Objects

Open rice mill object from object manager and click on edit. Click New in the Fields and Dependencies. Select Data type as “Number” and click Next. Give the Field Label as “ rice price/kg ” and length as “ 5 ”. Click Next, Next and Save.

Student - Skill Wallet

Object Manager | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

Object Manager

5 Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Cart Item Price Adjustment	CartItemPriceAdjustment	Standard Object			
Price Book	Pricebook2	Standard Object			
Price Book Entry	PricebookEntry	Standard Object			
rice details	rice_details__c	Custom Object		29/06/2024	✓
rice mill	rice_mill__c	Custom Object		29/06/2024	✓

https://accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home#setup/ObjectManager/01l0L00001FecX/Details/page?nodeId=ObjectManager&address=%2F01l0L00001FecX%2F&fretURL%3D%252Fsetup%252FO...

Edit
Delete

Student - Skill Wallet

rice mill | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01l0L00001FecX/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice mill

Details

Fields & Relationships

6 Items, Sorted by Field Label

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)		
rice mill Name	Name	Auto Number		✓
rice taken	rice_taken__c	Roll-Up Summary (SUM consumer)		

Search

29°C Haze

ENG IN 15:02 01-07-2024

Student - Skill Wallet

rice mill | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FecX/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice mill

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

External Lookup Relationship

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Checkbox

Allows users to select a True (checked) or False (unchecked) value.

Currency

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Date

Allows users to enter a date or pick a date from a popup calendar.

DateTime

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the DateTime field.

Email

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Geolocation

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Number

Allows users to enter any number. Leading zeros are removed.

Percent

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Phone

Allows users to enter any phone number. Automatically formats it as a phone number.

Picklist

Allows users to select a value from a list you define.

Picklist (Multi-Select)

Allows users to select multiple values from a list you define.

Text

Allows users to enter any combination of letters and numbers.

Student - Skill Wallet

rice mill | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FecX/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice mill

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

New Custom Field

Step 2. Enter the details

Help for this Page ?

Step 2 of 4

Previous Next Cancel

Field Label [i]

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length Decimal Places

Number of digits to the left of the decimal point [i]

Number of digits to the right of the decimal point

Description

Help Text

Student - Skill Wallet

rice mill | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FecX/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice mill

New Custom Field

Step 3 of 4

Help for this Page

Previous Next Cancel

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

rice mill

New Custom Field

Step 3 of 4

Help for this Page

Previous Next Cancel

Field Label: rice price/kg
Data Type: Number
Field Name: rice_price_kg
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Student - Skill Wallet

rice mill | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001FecX/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

rice mill

New Custom Field

Step 4 of 4

Help for this Page

Previous Save & New Save Cancel

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

rice mill

New Custom Field

Step 4 of 4

Help for this Page

Previous Save & New Save Cancel

Field Label: rice price/kg
Data Type: Number
Field Name: rice_price_kg
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 rice mill Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

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)		✓
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)		✓

G. Creating Fields In Consumer Objects

Create the following fields for consumer objects.

Field Name	Data Type
First name	Text
Last name	Text
Phone number	phone
email	email
Rice taken by shops	Number (length=5)
Rice type	(Picklist values) <ol style="list-style-type: none"> 1. basmati 2. normal rice
Mode of payment	Picklist values <ul style="list-style-type: none"> • Credit card • Debit card • Net banking • UPI • Cash

Screenshot of the Salesforce Object Manager page.

The URL is accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

The page shows a list of objects:

Label	API Name	Type	Description	Last Modified	Deployed
consumer	consumer__c	Custom Object		29/06/2024	✓
Consumption Rate	ConsumptionRate	Standard Object			
Consumption Schedule	ConsumptionSchedule	Standard Object			
Product Consumption Schedule	ProductConsumptionSchedule	Standard Object			

Actions for consumer__c: Edit, Delete

Screenshot of the Salesforce Object Manager page for the consumer object.

The URL is accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Id000001Fbuk/FieldsAndRelationships/view

The page shows the Fields & Relationships for the consumer object:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
consumer Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
rice mill name	rice_mill_name__c	Master-Detail(rice mill)		✓
rice taken by shops in kgs	rice_taken_by_shops_in_kgs__c	Number(18, 0)		

The screenshot shows the Salesforce Object Manager interface for the 'consumer' object. The left sidebar lists various setup options like Details, Page Layouts, Lightning Record Pages, etc. The main content area is titled 'Fields & Relationships' and displays a list of field types with their descriptions:

Field Type	Description
Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number	Allows users to enter any number. Leading zeros are removed.
Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist	Allows users to select a value from a list you define.
Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
Text	Allows users to enter any combination of letters and numbers.
Text Area	Allows users to enter up to 256 characters on separate lines.
Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted) <i>(Info)</i>	Allows users to enter any combination of letters and numbers and store them in encrypted form.
Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.000" are all valid times for this field.
URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

The screenshot shows the process of creating a new custom field for the 'consumer' object. The left sidebar shows the 'Fields & Relationships' section. The main area is titled 'New Custom Field' and 'Step 2. Enter the details'. The field is named 'First name' with a length of 10 characters. Other settings include a field name of 'First_name', no description, and no help text. Required and unique validation rules are also specified.

Step 2. Enter the details

Field Label: First name *(Info)*

Length: Please enter the maximum length for a text field below.
10

Field Name: First_name *(Info)*

Description:

Help Text: *(Info)*

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

Unique: Do not allow duplicate values

Screenshot of the Salesforce Setup interface showing the creation of a new custom field named "First name".

The "Fields & Relationships" section is selected in the sidebar.

Step 3. Establish field-level security:

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Step 4. Add to page layouts:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 consumer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Screenshot of the Salesforce Object Manager interface for the 'consumer' object.

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
consumer Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
First name	First_name__c	Text(10)		▼
Last Modified By	LastModifiedById	Lookup(User)		
rice mill name	rice_mill_name__c	Master-Detail(rice mill)		✓
rice taken by shops in kgs	rice_taken_by_shops_in_kgs__c	Number(18, 0)		▼

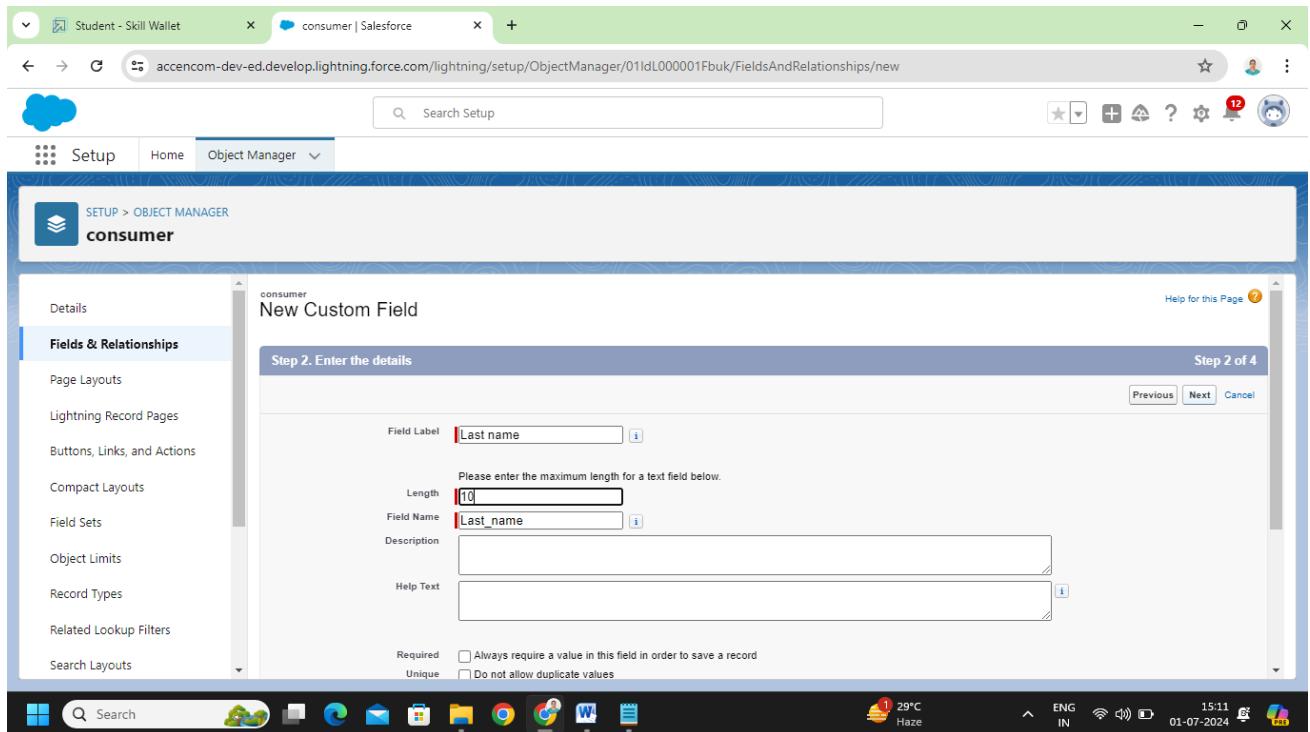
Screenshot of the Salesforce Object Manager interface for the 'consumer' object, showing field types.

Fields & Relationships

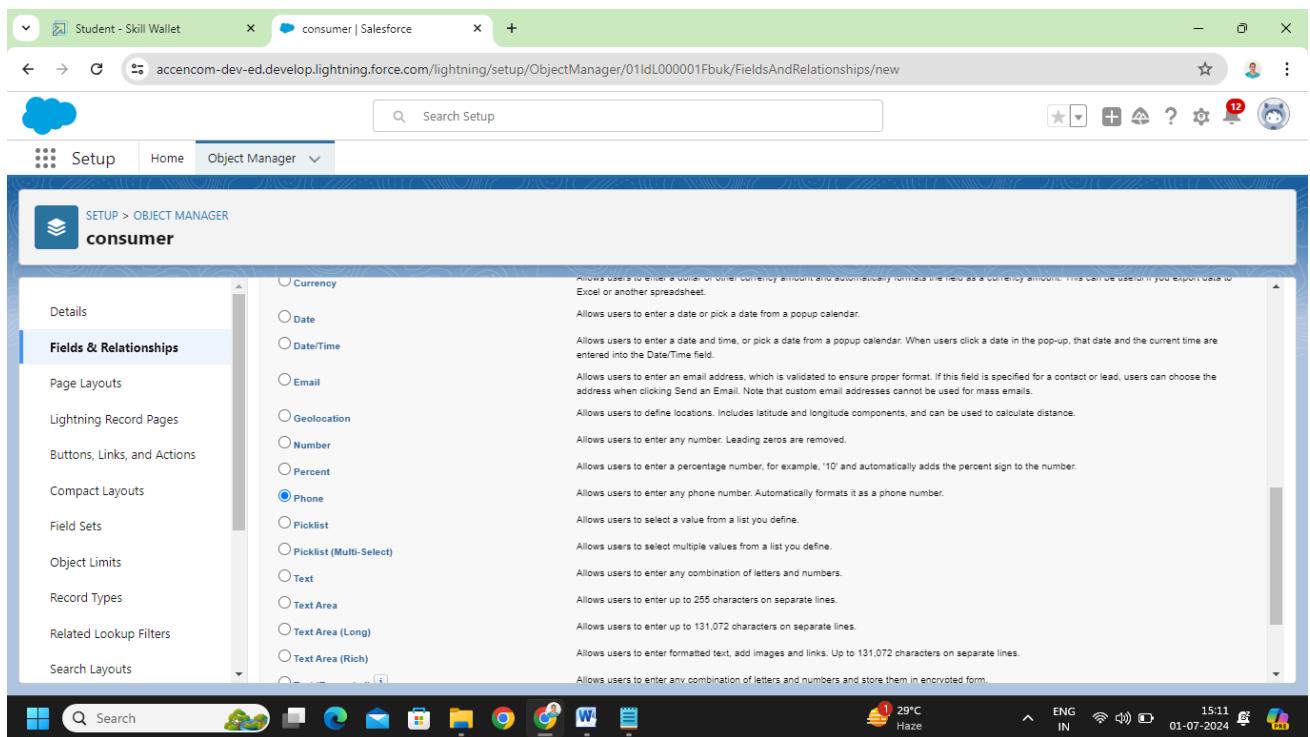
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) i
- Time
- URL

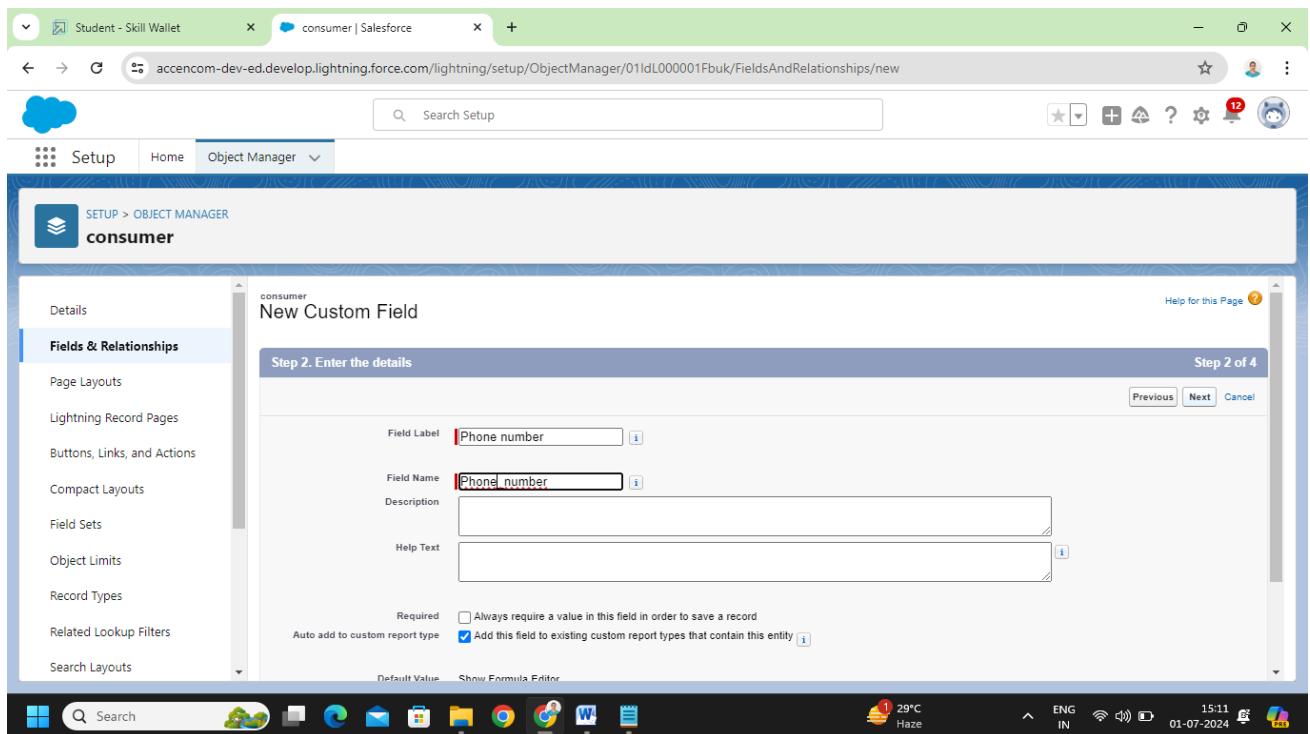
Descriptions for each field type:

- Email: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Geolocation: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Number: Allows users to enter any number. Leading zeros are removed.
- Percent: Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
- Phone: Allows users to enter any phone number. Automatically formats it as a phone number.
- Picklist: Allows users to select a value from a list you define.
- Picklist (Multi-Select): Allows users to select multiple values from a list you define.
- Text: Allows users to enter any combination of letters and numbers.
- Text Area: Allows users to enter up to 255 characters on separate lines.
- Text Area (Long): Allows users to enter up to 131,072 characters on separate lines.
- Text Area (Rich): Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
- Text (Encrypted): Allows users to enter any combination of letters and numbers and store them in encrypted form.
- Time: Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.000" are all valid times for this field.
- URL: Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

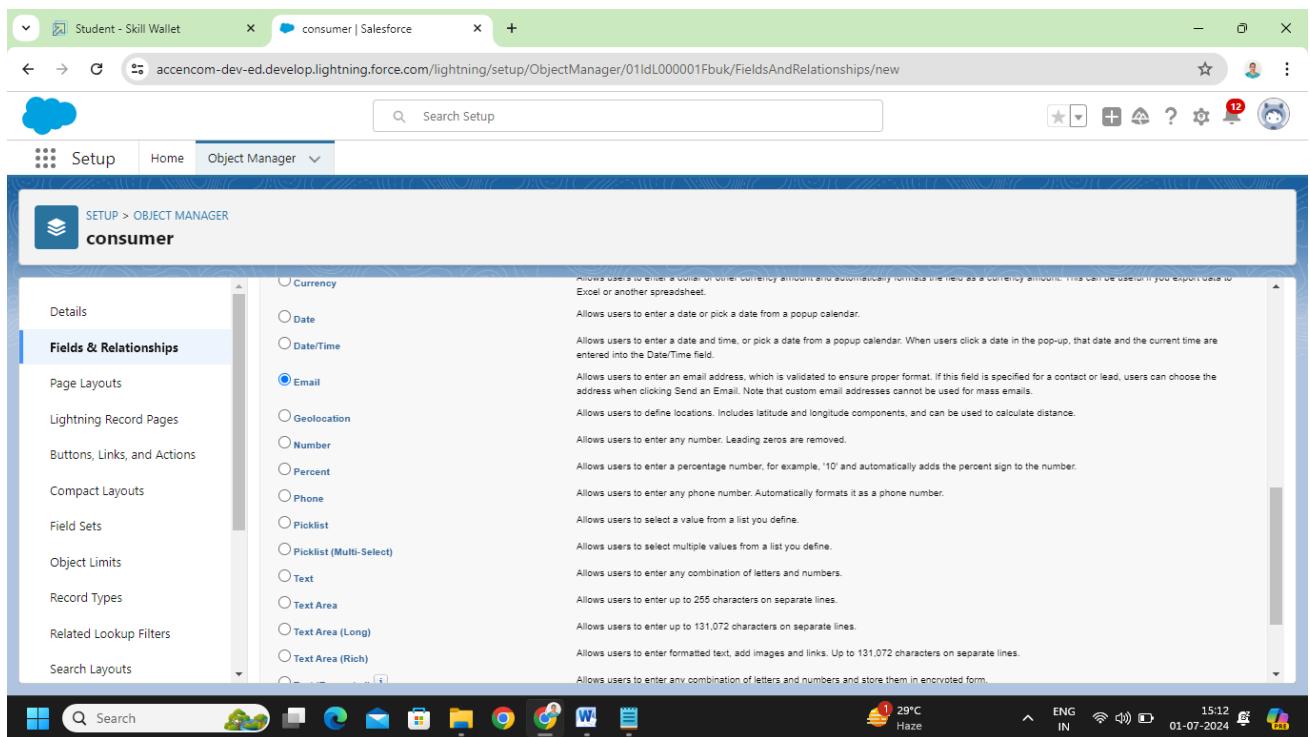


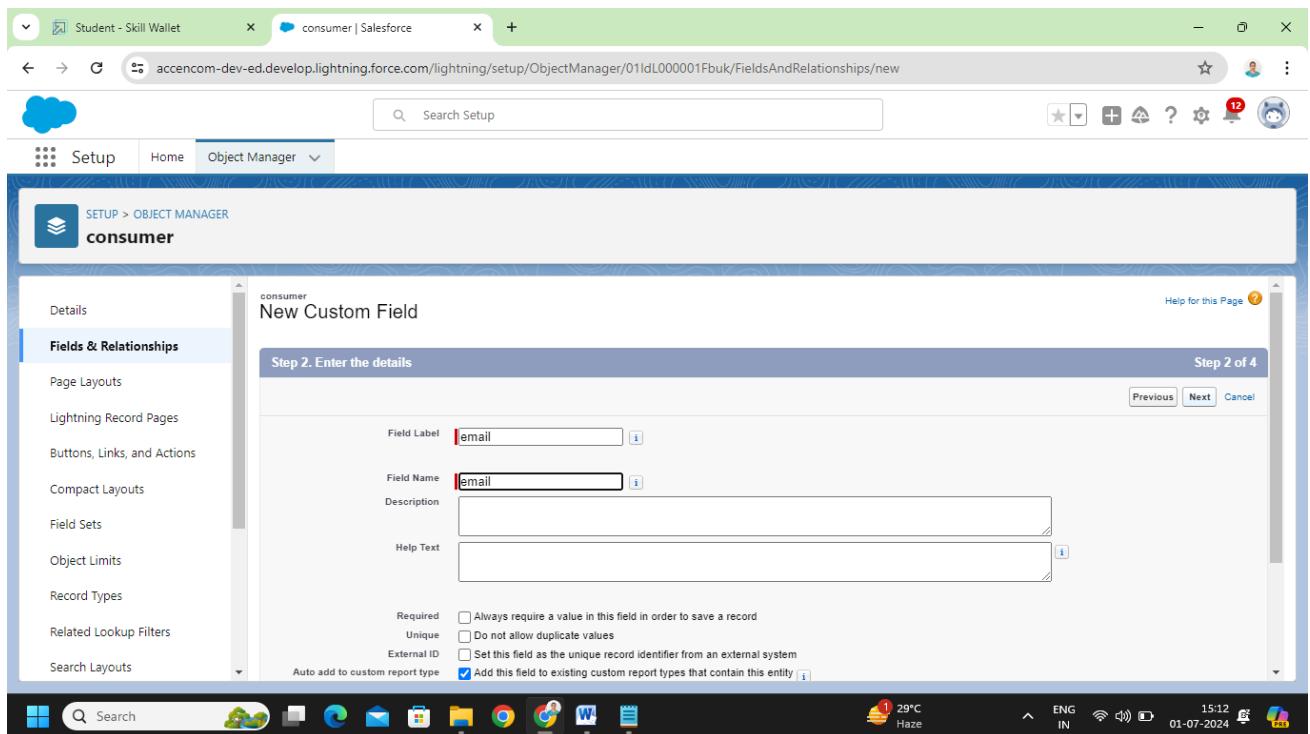
Click Next, Next and Save & New.



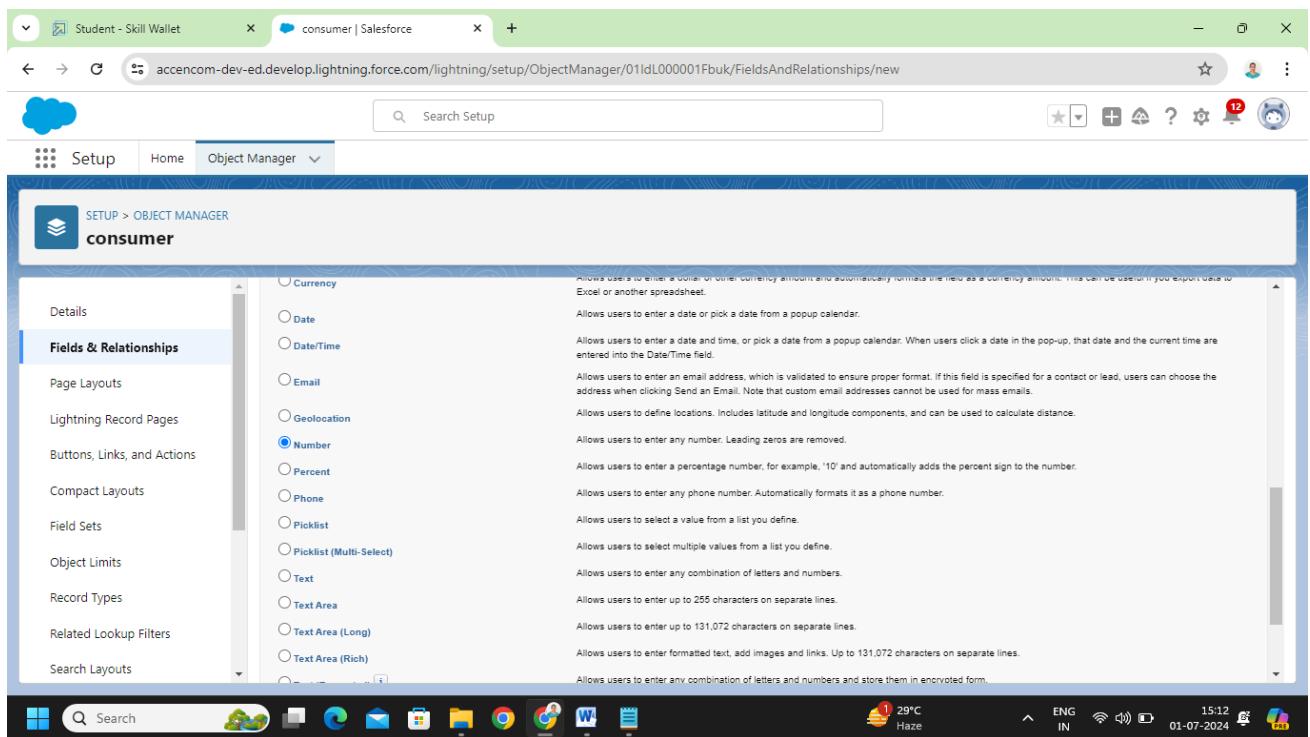


Click Next, Next and Save & New.





Click Next, Next and Save & New.



The screenshot shows the Salesforce Setup interface for creating a new custom field. The object being modified is 'consumer'. The current step is 'Step 2. Enter the details' of 'New Custom Field'. The field label is set to 'Rice taken by shops'. The length is specified as 5, and the decimal places are 0. The field name is 'Rice_taken_by_shops'. There is a note about the length and decimal places: 'Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.99".' The field type is selected as 'Text'. The description and help text fields are empty.

Click Next, Next and Save & New.

The screenshot shows the Salesforce Setup interface displaying a list of available field types. The 'Fields & Relationships' section is selected. The list includes:

- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)

Each field type has a brief description to its right. For example, 'Currency' allows users to edit the value of other currency amounts and automatically formats the field as a currency amount. 'Date' allows users to enter a date and pick a date from a popup calendar. 'Text' allows users to enter any combination of letters and numbers.

The screenshot shows the Salesforce Setup interface for the 'consumer' object. The user is in the 'Fields & Relationships' section, specifically on the 'New Custom Field' page. The 'Field Label' is set to 'Rice type'. Under 'Values', the 'Enter values, with each value separated by a new line' option is selected, and the input field contains 'basmati' and 'normal rice'. The status bar at the bottom indicates it's Step 2 of 4.

Click Next, Next and Save & New.

The screenshot shows the 'Fields & Relationships' section of the Salesforce Setup interface. The user is viewing a list of field types. The 'Picklist' option is selected, which is described as allowing users to select a value from a list defined by the administrator. Other options shown include Email, Geolocation, Number, Percent, Phone, Text, Picklist (Multi-Select), Text Area, Text Area (Long), Text Area (Rich), Text (Encrypted), Time, and URL.

Screenshot of the Salesforce Setup interface showing the creation of a new custom field named "Mode of payment".

Step 2. Enter the details:

- Field Label:** Mode of payment
- Values:** Use global picklist value set (radio button)
- Enter values:** Credit card, Debit card, Net banking, UPI, Cash
- Display values alphabetically, not in the order entered
- Use first value as default value

Step 3. Establish field-level security:

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Screenshot of the Salesforce Setup interface showing the creation of a new custom field for the 'consumer' object.

The page title is "New Custom Field" under "Step 4. Add to page layouts".

Field details:

- Field Label: Mode of payment
- Data Type: Picklist
- Field Name: Mode_of_payment

Description: Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name: consumer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Screenshot of the Salesforce Setup interface showing the list of fields for the 'consumer' object.

The page title is "Fields & Relationships".

Table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
consumer Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
email	email_c	Email		▼
First name	First_name_c	Text(10)		▼
Last Modified By	LastModifiedById	Lookup(User)		
Last name	Last_name_c	Text(10)		▼
Mode of payment	Mode_of_payment_c	Picklist		▼

The screenshot shows the Salesforce setup interface for the 'consumer' object. The left sidebar has a 'Fields & Relationships' section with links to Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main area is titled 'Fields & Relationships' and shows 12 items, sorted by Field Label. It includes columns for Field Name, API Name, and Data Type. Key fields shown include 'Last name' (Text(10)), 'Mode of payment' (Picklist), 'Phone number' (Phone), 'rice mill name' (Master-Detail(rice mill)), 'Rice taken by shops' (Number(5, 0)), 'rice taken by shops in kgs' (Number(18, 0)), and 'Rice type' (Picklist). A toolbar at the top right includes 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'.

H. 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.

Go to setup and click on Object Manager Click on "consumer" object. Click on fields & relationship and click on New. Select Data type as “Formula” and click Next. Give Field Label and Field Name as “Amount Paid ” and select formula return type as “Number” and click next. Insert fields formula should be :

`rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c`

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

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Object Manager | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

Object Manager

9 Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Authorization Form Consent	AuthorizationFormConsent	Standard Object			
Communication Subscription Consent	CommSubscriptionConsent	Standard Object			
<u>consumer</u>	consumer_c	Custom Object		29/06/2024	✓
Consumption Rate	ConsumptionRate	Standard Object			
Consumption Schedule	ConsumptionSchedule	Standard Object			
Contact Point Consent	ContactPointConsent	Standard Object			
Contact Point Type Consent	ContactPointTypeConsent	Standard Object			
Party Consent	PartyConsent	Standard Object			
Product Consumption Schedule	ProductConsumptionSchedule	Standard Object			

https://accencom-dev-ed.develop.lightning.force.com/one/one.app#/setup/Object...
 Search ENG IN 30°C Haze 15:30 01-07-2024

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consumer | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001Fbuk/FieldsAndRelationships/view

Setup Home Object Manager

consumer

SETUP > OBJECT MANAGER

Fields & Relationships				
Details	12 Items, Sorted by Field Label			
Fields & Relationships				
Page Layouts	consumer Name	Name	Auto Number	✓
Lightning Record Pages	Created By	CreatedBy	Lookup(User)	
Buttons, Links, and Actions	email	email_c	Email	
Compact Layouts	First name	First_name_c	Text(10)	
Field Sets	Last Modified By	LastModifiedBy	Lookup(User)	
Object Limits	Last name	Last_name_c	Text(10)	
Record Types	Mode of payment	Mode_of_payment_c	Picklist	
Related Lookup Filters				
Search Layouts				

Search ENG IN 30°C Haze 15:30 01-07-2024

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accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001Fbuk/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

Details Fields & Relationships

Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts

consumer New Custom Field Step 1

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Help for this Page

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accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001Fbuk/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

Details Fields & Relationships

Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts

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]`

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.

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accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dL000001Fbuk/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

New Custom Field

Step 3 of 5

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Fahrenheit = 1.8 * Celsius_c + 32 [More Examples](#)

Simple Formula Advanced Formula

Insert Field Insert Operator Functions

-- All Function Categories --

ABS ACOS ADDMONTHS AND ASCII ASIN

Amount Paid (Number) = rice_taken_by_shop_c * rice_mill_name_r.rice_price_kg_c

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

1 30°C Haze ENG IN 01-07-2024

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accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dL000001Fbuk/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

New Custom Field

Step 3 of 5

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Fahrenheit = 1.8 * Celsius_c + 32 [More Examples](#)

Simple Formula Advanced Formula

Insert Field Insert Operator Functions

-- All Function Categories --

ABS ACOS ADDMONTHS AND ASCII ASIN

Amount Paid (Number) = rice_taken_by_shop_c * rice_mill_name_r.rice_price_kg_c

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

1 30°C Haze ENG IN 01-07-2024

The screenshot shows two consecutive steps in the Salesforce Setup interface for creating a new custom field:

Step 4. Establish field-level security

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	✓
Analytics Cloud Security User	<input checked="" type="checkbox"/>	✓
Contract Manager	<input checked="" type="checkbox"/>	✓
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	✓

Step 5. Add to page layouts

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 consumer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

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

Go to setup and click on Object Manager Click on "consumer" object. Click on fields & relationship and click on New. Select Data type as "Formula" and click Next. Give Field Label and Field Name as "Consumer Name" and select formula return type as "TEXT" and click next. Insert field formula should be :

First_Name__c + '' + Last_Name__c

Click “Check Syntax” and Save.

The screenshot shows the Salesforce Object Manager interface for the 'consumer' object. The left sidebar has 'Fields & Relationships' selected. The main area displays a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid__c	Formula (Number)		
consumer Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
email	email__c	Email		
First name	First_name__c	Text(10)		
Last Modified By	LastModifiedById	Lookup(User)		
Last name	Last_name__c	Text(10)		

The screenshot shows the 'New Custom Field' wizard for the 'consumer' object. Step 1: Choose the field type. The 'Formula' option is selected. The 'Data Type' section provides details about the formula field:

Specify the type of information that the custom field will contain.

Data Type

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

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accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dL000001Fbuk/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Field Label: Consumer Name Field Name: Consumer_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 datetime, for example, by adding a number of hours or days to another date/time.
Example: `[Next = NOW() + 1]`
- 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]`
- Text Create a text string, for example, by concatenating other text fields.

1 NIFTY +0.56% ENG IN 01-07-2024

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accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dL000001Fbuk/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

Details

Fields & Relationships

Page Layouts

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Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

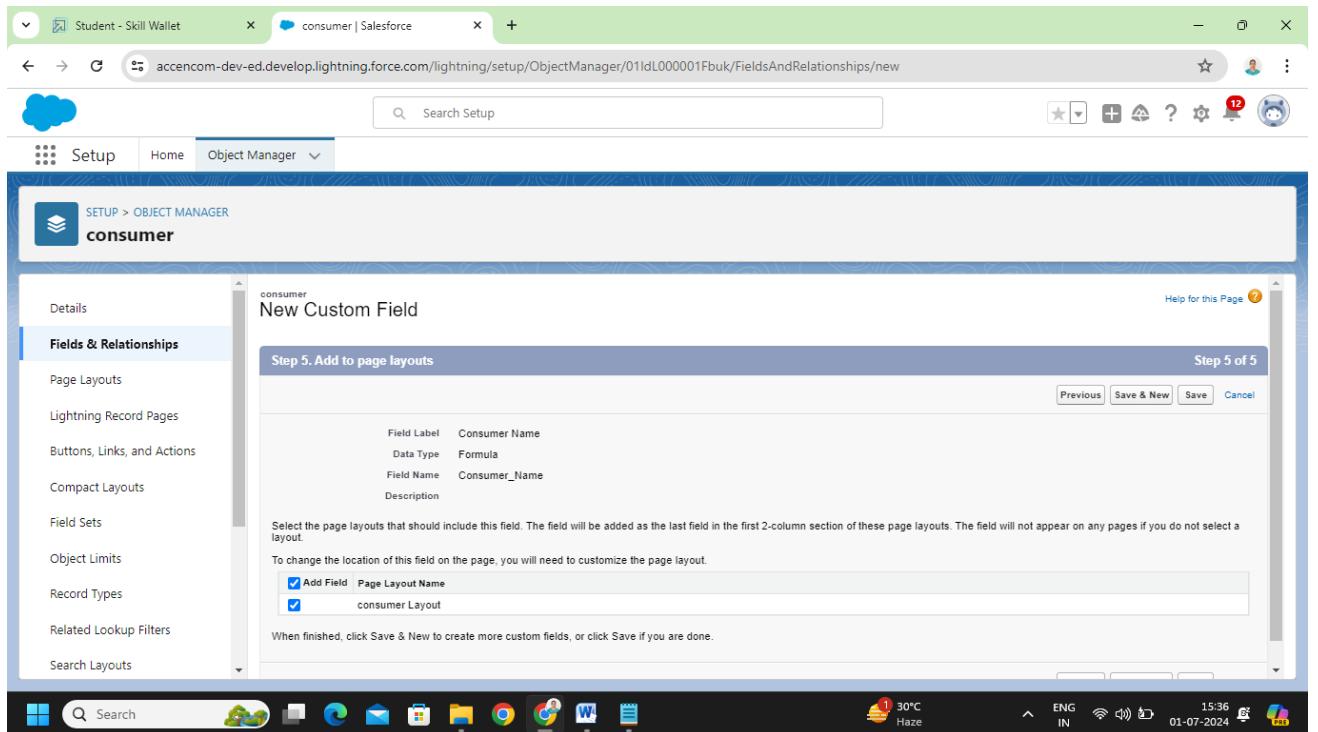
Consumer Name (Text) =
`First_name_c + ' ' + Last_name_c`

Check Syntax No syntax errors in merge fields or functions. (Compiled size: 35 characters)

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

1 30°C Haze ENG IN 01-07-2024



I. Creating The Validation Rule

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.

Go to the setup page and click on object manager. Open the consumer object and click on the validation rule. Click New and enter the Rule name as “Phonenumberoremailblankrule ”. Enter the description as “phone number and email number should not be blank”. Enter the formula as below and check the syntax.

“OR(ISBLANK(phone_number_c), ISBLANK(email_c))”

Under the error message write as”please fill in your phone number.” Select error location “top of page”. Save the validation rule.

Student - Skill Wallet

Object Manager | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

Object Manager

4 Items, Sorted by Label

Label	API Name	Type	Description	Last Modified	Deployed
consumer	consumer__c	Custom Object		29/06/2024	✓
Consumption Rate	ConsumptionRate	Standard Object			
Consumption Schedule	ConsumptionSchedule	Standard Object			
Product Consumption Schedule	ProductConsumptionSchedule	Standard Object			

https://accencom-dev-ed.develop.lightning.force.com/one/one.app#/setup/Object...

Student - Skill Wallet

consumer | Salesforce

Search Setup

Validation Rules

0 Items, Sorted by Rule Name

Rule Name	Error Location	Error Message	Active	Modified By
		No items to display.		

Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules

New

Screenshot of the Salesforce Setup interface showing the creation of a Validation Rule for the 'consumer' object.

Validation Rule Edit

Rule Name: Phononenumberoremailblankrule

Active:

Description: phone number and email number should not be blank

Error Condition Formula:

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

Functions:

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII

Error Message:

Example: Discount_Percent__c>0.30

This message will appear when Error Condition formula is true

Error Message: please fill in your phone number.

Error Location: Top of Page

The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for 'Student - Skill Wallet' and 'Object Manager | Salesforce'. The URL in the address bar is accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F03ddL000001xx8L. Below the header, there's a search bar with the placeholder 'Search Setup'. The main content area has a blue header bar with 'SETUP' and 'Object Manager' buttons. The main title is 'consumer Validation Rule'. Below it, there's a sub-header 'Validation Rule Detail'. The rule details are as follows:

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	Jasvitha Perumal 01/07/2024, 3:42 pm	Modified By Jasvitha Perumal 01/07/2024, 3:42 pm

At the bottom of the page, there are 'Edit' and 'Clone' buttons. The system status bar at the bottom right shows '30°C Haze', 'ENG IN', '15:42', and the date '01-07-2024'.

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.

A. Creating The Page Layout

To Create a Page layout, open the "consumer" object. Click on Page layout and Click on New. Select the existing page layout, and give the page layout name as "consumer layout", and click save. Drag and drop the section field to consumer details and create the section. Enter the section name as "Personal details", - click Ok. Now drag the fields to this section that mentioned , they are First name , last name , consumer name , phone number, email, rice mill name. Follow the same process for another two sections, they are One section is " rice details " , drag the fields that are Rice taken by shop, rice type. Another section is "Receipt details " , and drag the fields that are Mode of payment , Amount paid.

Student - Skill Wallet

Object Manager | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

Object Manager

4 Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
consumer	consumer__c	Custom Object		29/06/2024	✓
Consumption Rate	ConsumptionRate	Standard Object			
Consumption Schedule	ConsumptionSchedule	Standard Object			
Product Consumption Schedule	ProductConsumptionSchedule	Standard Object			

https://accencom-dev-ed.develop.lightning.force.com/one/one.app#/setup/Object...

Search ENG IN 30°C Haze 15:46 01-07-2024

Student - Skill Wallet consumer | Salesforce

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Page Layouts

1 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
consumer Layout	Jaswitha Perumal, 29/06/2024, 11:54 am	Jaswitha Perumal, 01/07/2024, 3:36 pm

Search ENG IN 30°C Haze 15:54 01-07-2024

Student - Skill Wallet

consumer | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001Fbuk/PageLayouts/new

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

Create New Page Layout

As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names are translated for your international users.

Existing Page Layout: consumer Layout

Page Layout Name: Personal details

Save Cancel

Help for this Page

Student - Skill Wallet

consumer | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001Fbuk/PageLayouts/00hdL000004J9yA/view

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

consumer Detail

Information (Header visible on edit only)

consumer Name	GEN-2004-001234
rice mill name	Sample Text
rice taken by shops in kgs	70.998
First name	Sample Text
Last name	Sample Text
Phone number	1.415-555-1212
email	sarah.sample@company.com
Rice taken by shops	56.915

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

Fields

Buttons Quick Actions Mobile & Lightning Actions Expanded Lookups Related Lists Report Charts

consumer Name Consumer Name Last Modified By rice mill name

Created By Last name Rice taken by shops

Amount Paid email Mode of payment rice taken by sho...

consumer Name First name Phone number Rice type

Standard Buttons Edit Delete Clone Change Owner Change Record Type Printable View Edit Labels Custom Buttons

BSE smcap +1.58% ENG IN 15:56 01-07-2024

Search 30°C Haze ENG IN 15:57 01-07-2024

Student - Skill Wallet

consumer | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001Fbuk/PageLayouts/00hdL000004J9yA/view

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts

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

Fields Quick Find Field Name * Section Blank Space Amount Paid consumer Name

consumer Detail

Information (Header visible on edit only)

consumer Name	GLEN-2004-001234
rice mill name	Sample Text
rice taken by shops in kgs	70.998
First name	Sample Text
Last name	Sample Text
Phone number	1.415-555-1212
email	sarah.sample@company.com

Section Properties

Section Name Personal details

Display Section Header On Detail Page Edit Page

Layout Tab-key Order

Layout: 1-Column 2-Column Left-Right Top-Down

OK Cancel

Custom Buttons

Student - Skill Wallet

consumer | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001Fbuk/PageLayouts/00hdL000004J9yA/view

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts

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

Fields Quick Find Field Name * Section Consumer Name Last Modified By rice mill name Blank Space Created By Last name Rice taken by shops Amount Paid email Mode of payment rice taken by sho... consumer Name First name Phone number Rice type

Personal details

First name	Sample Text
Last name	Sample Text
consumer Name	GLEN-2004-001234
Phone number	1.415-555-1212
email	sarah.sample@company.com
rice mill name	Sample Text

Information (Header visible on edit only)

rice taken by shops in kgs	70.998
Rice taken by shops	56.915
Rice type	Sample Text

USD/INR +0.09%

ENG IN 1558 01-07-2024

Student - Skill Wallet

consumer | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001Fbuk/PageLayouts/00hdL000004J9yA/view

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts

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

Fields Quick Find Field Name

Section Blank Space Amount Paid consumer Name

consumer Detail

Personal details

First name	Sample Text
Last name	Sample Text
consumer Name	GEN-2004-001234
Phone number	1-415-555-1212
email	sarah.sample@company.com
* rice mill name	Sample Text

Information (Header visible on edit only)

Section Properties

Section Name rice details

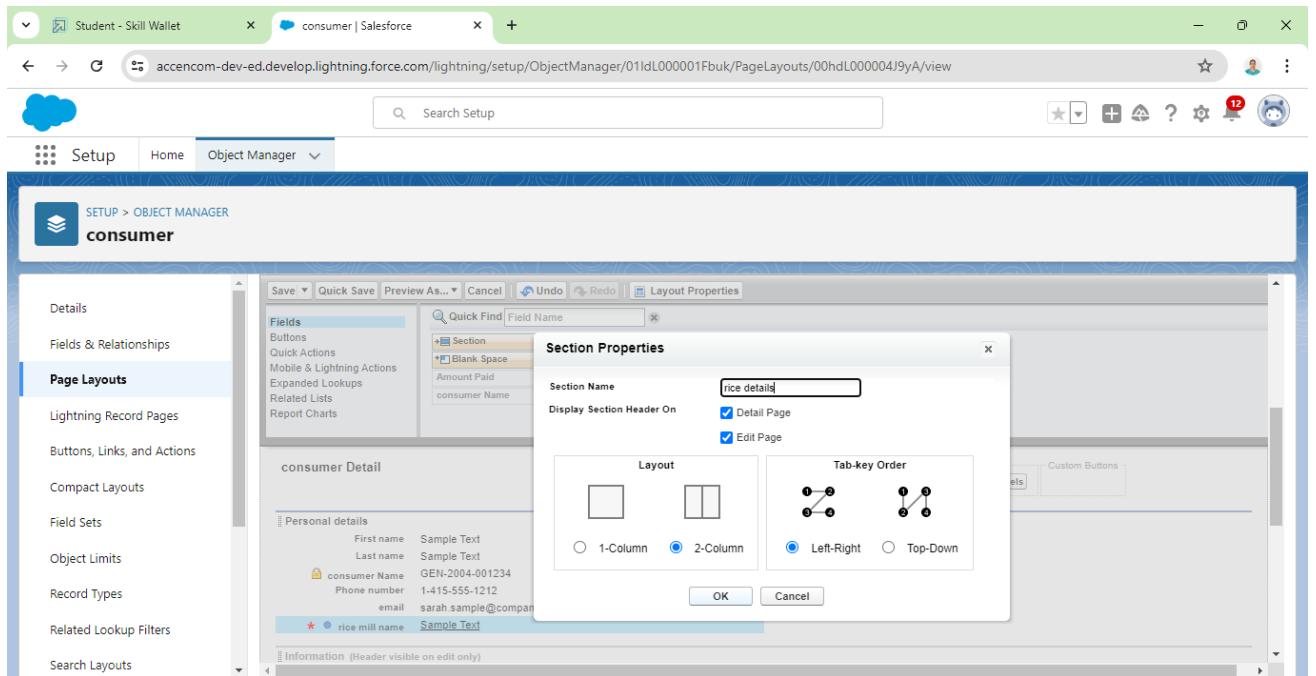
Display Section Header On Detail Page Edit Page

Layout Tab-key Order

Layout: 1-Column 2-Column

Tab-key Order: Left-Right Top-Down

OK Cancel



Student - Skill Wallet

consumer | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001Fbuk/PageLayouts/00hdL000004J9yA/view

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts

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

Fields Quick Find Field Name

Section Consumer Name Last Modified By rice mill name

Blank Space Created By Last name Rice taken by shops

Amount Paid email Mode of payment rice taken by sho...

consumer Name First name Phone number Rice type

Phone number 1-415-555-1212

email sarah.sample@company.com

* rice mill name Sample Text

rice details

Rice taken by shops	56.915
Rice type	Sample Text

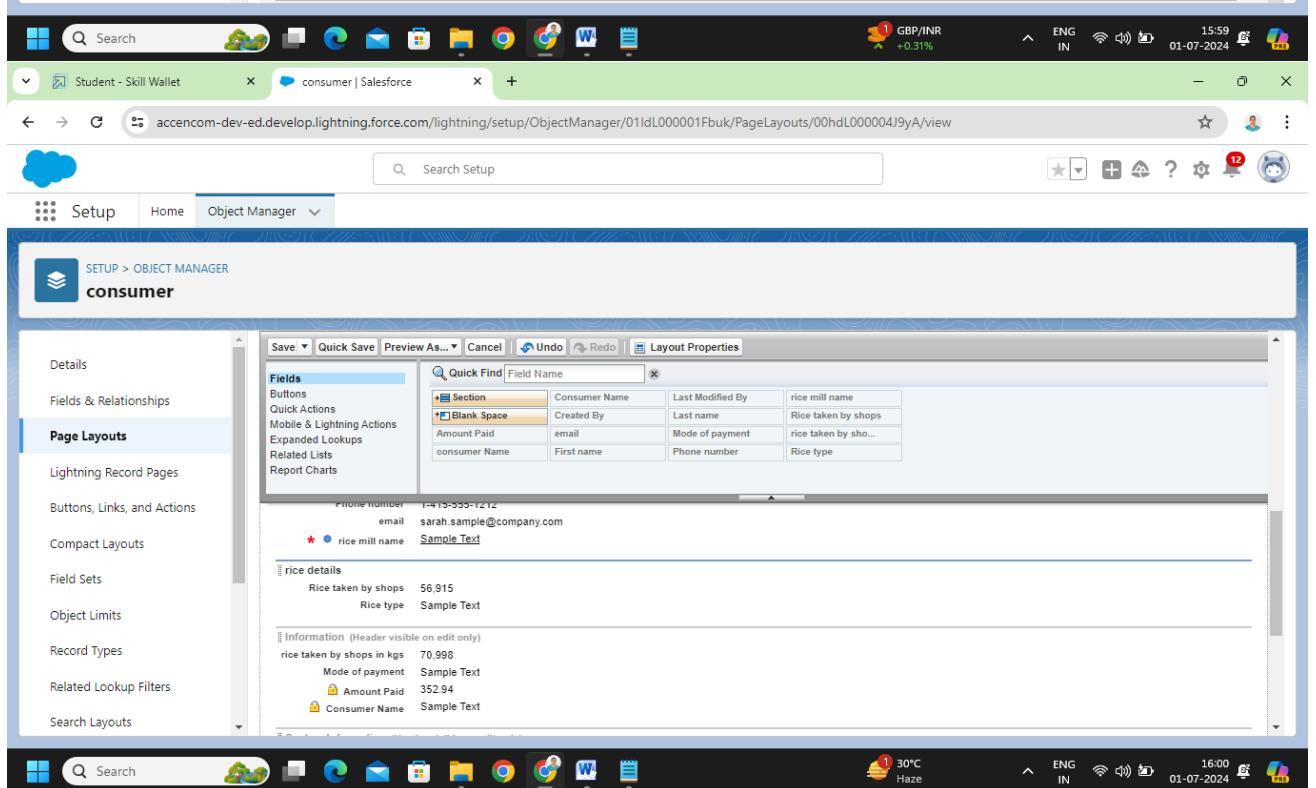
Information (Header visible on edit only)

rice taken by shops in kgs 70.998

Mode of payment Sample Text

Amount Paid 352.94

Consumer Name Sample Text



The screenshot shows the Salesforce Setup interface for the 'consumer' object. The 'Page Layouts' tab is selected in the left sidebar. A modal window titled 'Section Properties' is open, allowing the user to define a section named 'Receipt details' with a 2-column layout. The main area displays the page layout configuration for the 'consumer' object, including fields like 'Consumer Name', 'Last Modified By', 'rice mill name', 'Created By', 'Last name', 'Rice taken by shops', 'Amount Paid', 'email', 'Mode of payment', 'rice taken by sh...', 'consumer Name', 'First name', 'Phone number', and 'Rice type'. The system status bar at the bottom shows the date as 01-07-2024 and the time as 16:00.

Then , Click save.

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, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

A. Owner Profile

To create a new profile, go to setup and type profiles in quick find box. Click on profiles, clone the desired profile (Standard User) and enter profile name (owner), and then Save. Scroll down to Custom Object Permissions and Give access permissions for consumers, rice details , rice mill and suppliers objects. Give access and save it.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar shows 'Users' and 'Profiles'. The main area has a search bar and a table listing profiles. The table columns are 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Custom' column contains checkboxes. The 'User License' column lists various Salesforce licenses. The 'Profile Name' column lists profiles such as 'Analytics Cloud Integration User', 'Authenticated Website', 'Chatter External User', etc. The 'User License' column shows 'External Apps Login' checked for 'Chatter External'.

Action	Profile Name	User License	Custom
Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Del ...	B2B Reordering Portal Buyer Profile	External Apps Login	<input checked="" type="checkbox"/>
Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Cross_Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar shows 'Users' and 'Profiles'. The main area has a search bar and a table listing profiles. The table columns are 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Custom' column contains checkboxes. The 'User License' column lists various Salesforce licenses. The 'Profile Name' column lists profiles such as 'Salesforce API Only System Integrations', 'Silver Partner User', 'Solution Manager', etc. The 'User License' column shows 'Salesforce' checked for 'Standard User'.

Action	Profile Name	User License	Custom
Edit Del ...	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

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Profiles | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2Fui%2Fperms%2Fui%2Fprofile%2FProfileClone%2Fe%3Fid%3D00edL0000...

Setup Home Object Manager

Search Setup

profiles

Users Profiles

Didn't find what you're looking for?
Try using Global Search.

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile Standard User
User License Salesforce
Profile Name owner

Save Cancel

Help for this Page

Student - Skill Wallet

Profiles | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edL000003kli9%3Fsetupid%3DEnhancedProfiles

Setup Home Object Manager

Search Setup

profiles

Users Profiles

Didn't find what you're looking for?
Try using Global Search.

Profile OWNER

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.

Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access |
Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access |
Enabled Custom Permissions

Profile Detail

Name	owner	Custom Profile
User License	Salesforce	<input checked="" type="checkbox"/>
Description		
Created By	Jaswitha Perumal 01/07/2024, 4:09 pm	Modified By Jaswitha Perumal 01/07/2024, 4:09 pm

Page Layouts

Standard Object Layouts

Global	Location Group Assignment	Location Group Assignment Layout
Global Layout [View Assignment]		[View Assignment]
Email Application Not Assigned	Macro	Macro Layout [View Assignment]

30°C Haze ENG IN 01-07-2024

The screenshots show the Salesforce Setup interface for managing profiles. In the top screenshot, the 'Profiles' page is displayed, showing sections for Location Groups, Work Step Templates, Work Types, and Work Type Groups. Under 'Custom Object Permissions', there are two rows: 'consumers' and 'rice details'. The 'consumers' row has checkboxes for Read, Create, Edit, Delete, View All, and Modify All. The 'rice details' row also has checkboxes for the same permissions. In the bottom screenshot, the 'Session Settings' and 'Password Policies' sections are being configured. The 'Session Settings' section shows 'Session Times Out After' set to '2 hours of inactivity' and 'Session Security Level Required at Login' set to '--None--'. The 'Password Policies' section includes fields for 'User passwords expire in' (set to '90 days'), 'Enforce password history' (set to '3 passwords remembered'), 'Minimum password length' (set to '8'), 'Password complexity requirement' (set to 'Must include alpha and numeric characters'), 'Password question requirement' (set to 'Cannot contain password'), 'Maximum invalid login attempts' (set to '10'), 'Lockout effective period' (set to '15 minutes'), and several checkboxes for obscure secret answers, minimum password lifetime, and forgot password emails.

B. Employer Profile

Open profiles and clone the desired profile (Standard Platform User). Enter profile name (employer) and click Save. While still on the profile page, then click Edit. Select the Custom App settings as default for the rice mill. Scroll down to Custom Object Permissions and Give access permissions for consumer, rice details , rice mill and suppliers objects. Click save.

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Profiles | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Setup Home Object Manager

Search Setup

Profiles

Help for this Page

New Profile

Action Profile Name User License Custom

<input type="checkbox"/>	Edit Del ...	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

1-6 of 6 0 Selected

Previous Next Page 1 of 1

Student - Skill Wallet

Profiles | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_ui%2Fperms%2Fu%2Fprofile%2FProfileClone%2Fe%3Fid%3D00edL000003dgX%26setupid%3DEnhancedProfiles%26retURL%3D%252F00e%253Ffcf%253D008dL00000809XB%2526rolodexIndex%253D18%2526page%253D...

Setup Home Object Manager

Search Setup

Profiles

Help for this Page

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile Standard Platform User
User License Salesforce Platform
Profile Name

Save Cancel

Search 30°C Haze ENG IN 16:13 01-07-2024

Student - Skill Wallet

Profiles | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edL000003knI%3Fsetupid%3DEnhancedProfiles

Setup Home Object Manager

Search Setup

profiles

SETUP Profiles

Profile employer

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

Name	employer	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce Platform		
Description			
Created By	Jaswitha Perumal	Modified By	Jaswitha Perumal
	01/07/2024, 4:13 pm		01/07/2024, 4:13 pm

Page Layouts

Standard Object Layouts	Global	Global Layout [View Assignment]	Lead	Lead Layout [View Assignment]
Email Application		Not Assigned [View Assignment]	Location	Location Layout [View Assignment]

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Profiles | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edL000003knI%3FretURL%3D%252F00edL000003knI%253Fsetu...
01-07-2024

Setup Home Object Manager

Search Setup

profiles

SETUP Profiles

Profile Edit

Name	employer	Save	Save & New	Cancel
User License	Salesforce Platform	Custom Profile	<input checked="" type="checkbox"/>	
Description				

Custom App Settings

Analytics Studio (standard__Insights)	Visible <input type="checkbox"/>	Default <input checked="" type="radio"/>	Platform (standard__Platform) <input checked="" type="checkbox"/>	Visible <input checked="" type="checkbox"/>	Default <input type="radio"/>
App Launcher (standard__AppLauncher)	Visible <input type="checkbox"/>	Default <input checked="" type="radio"/>	WDC (standard__Work)	Visible <input type="checkbox"/>	Default <input type="radio"/>
MY RICE (MY_RICE)	Visible <input checked="" type="checkbox"/>	Default <input checked="" type="radio"/>			

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

- User passwords expire in: 90 days
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 10
- Lockout effective period: 15 minutes
- Obfuscate secret answer for password resets:
- Require a minimum 1 day password lifetime:
- Don't immediately expire links in forgot password emails:

C. Worker Profile

Open profiles and clone the desired profile (Standard Platform User). Enter profile name (worker) and click on Save. While still on the profile page, then click Edit. Select the Custom App settings as default for the rice mill. Scroll down to Custom Object Permissions and Give access permissions for consumer, rice details , rice mill and suppliers objects. And click save.

Student - Skill Wallet

Profiles | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Setup Home Object Manager

Search Setup

profiles

Users Profiles

Didn't find what you're looking for? Try using Global Search.

SETUP Profiles

Help for this Page

All Profiles | Edit | Delete | Create New View

New Profile

Action Profile Name User License Custom

Edit | Del ... Salesforce API Only System Integrations Salesforce Integration ✓

Edit | Clone Silver Partner User Silver Partner

Edit | Clone Solution Manager Salesforce

Edit | Clone Standard Platform User Salesforce Platform

Edit | Clone Standard User Salesforce

Edit | Clone System Administrator Salesforce

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

1-6 of 6 | 0 Selected | Previous Next | Page 1 of 1

Student - Skill Wallet

Profiles | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2Fui%2Fperms%2Fprofile%2FProfileClone%2Fe%3Fid%3D00edL0000...

Setup Home Object Manager

Search Setup

profiles

Users Profiles

Didn't find what you're looking for? Try using Global Search.

SETUP Profiles

Help for this Page

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile: Standard Platform User
User License: Salesforce Platform
Profile Name: worker

Save Cancel

30°C Haze

ENG IN 16:20 01-07-2024

Student - Skill Wallet

Profiles | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edL000003kp93%2Fe%3FretURL%3D%252F00edL000003kp93%253Fse...

Setup Home Object Manager

Search Setup

profiles

Users Profiles

Didn't find what you're looking for?
Try using Global Search.

Profile Edit worker

Help for this Page ?

Profile Edit

Name: worker
User License: Salesforce Platform
Description:

Custom Profile: ✓

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input checked="" type="radio"/>
MY RICE (MY_RICE)	<input type="checkbox"/>	<input checked="" type="radio"/>			

Required Information

Student - Skill Wallet

Profiles | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edL000003kp93%2Fe%3FretURL%3D%252F00edL000003kp93%253Fse...

Setup Home Object Manager

Search Setup

profiles

Users Profiles

Didn't find what you're looking for?
Try using Global Search.

Profiles

Contact Point Addresses Contact Point Consents Contact Point Emails Sellers Streaming Channels User External Credentials

	Read	Create	Edit	Delete	View All i	Modify All i		Read	Create	Edit	Delete	View All i	Modify All i		Read	Create	Edit	Delete	View All i	Modify All i
consumers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
rice details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

Custom Object Permissions

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

Session Settings

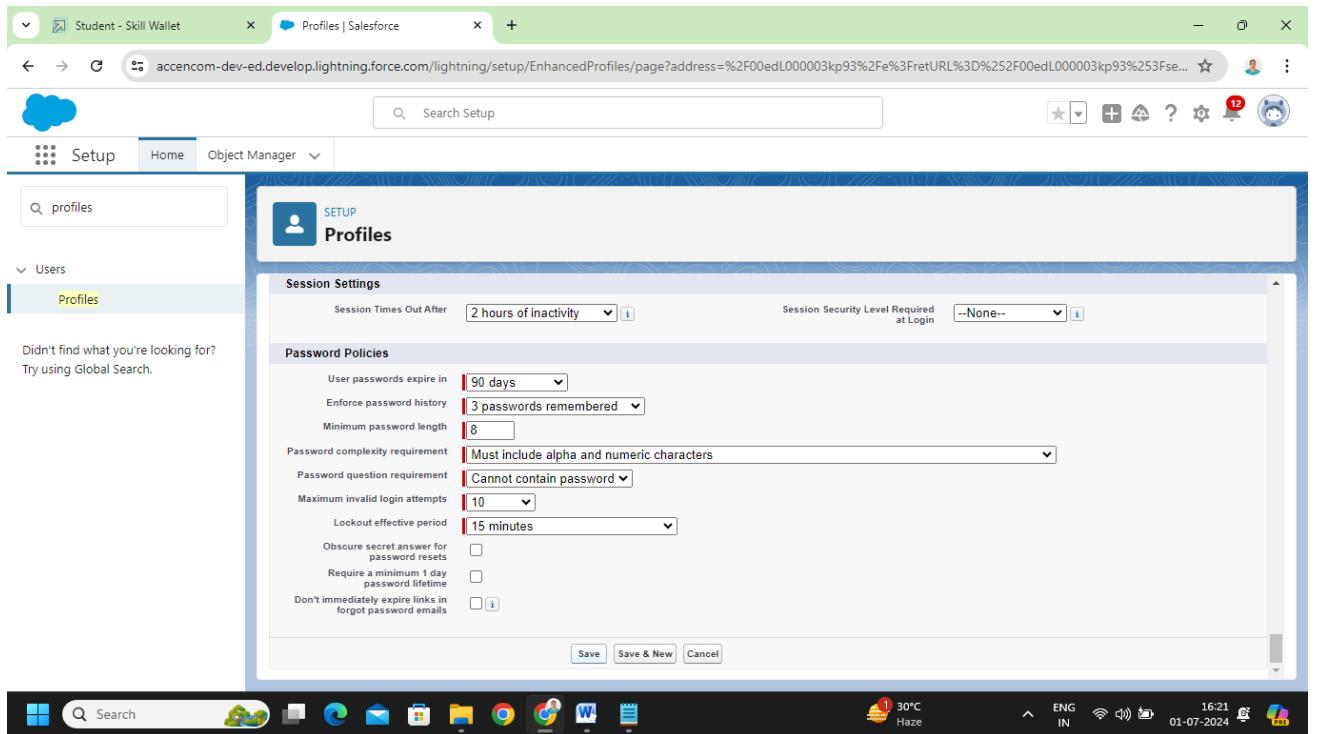
Session Times Out After: 2 hours of inactivity [i](#)

Session Security Level Required at Login: --None-- [i](#)

Password Policies

User passwords expire in: 90 days

ENG IN 30°C Haze 16:20 01-07-2024



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.

A. Creating Owner Role

Go to quick find and Search for Roles, click on set up roles, Click on Expand All and click on add role under whom this role works. Give Label as “owner” and Role name gets auto populated. Then click on Save. Click and save it.

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Roles | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/Roles/home

Setup Home Object Manager

Search Setup

SETUP Roles

Understanding Roles

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

Sample Role Hierarchy

View other sample Role Hierarchies: Territory-based Sample

```

graph TD
    ExecutiveStaff[Executive Staff] --> WesternSalesDirector[Western Sales Director]
    ExecutiveStaff --> EasternSalesDirector[Eastern Sales Director]
    ExecutiveStaff --> InternationalSalesDirector[International Sales Director]
    WesternSalesDirector --> WesternSalesRep[Western Sales Rep]
    EasternSalesDirector --> EasternSalesRep[Eastern Sales Rep]
    InternationalSalesDirector --> InternationalSalesRep[International Sales Rep]
    WesternSalesRep --> CA_Sales_Rep[CA Sales Rep]
    WesternSalesRep --> OR_Sales_Rep[OR Sales Rep]
    EasternSalesRep --> NY_Sales_Rep[NY Sales Rep]
    EasternSalesRep --> MA_Sales_Rep[MA Sales Rep]
    InternationalSalesRep --> Asian_Sales_Rep[Asian Sales Rep]
    InternationalSalesRep --> European_Sales_Rep[European Sales Rep]
  
```

- CEO, President, CFO, VP, Sales
- View & edit data, roll up forecasts, & generate reports for own data only. Can't access data of other Executive Staff
- Western Sales Director, Director of W. Sales
- View & edit data, roll up forecasts, & generate reports for all users directly below
- Eastern Sales Director, Director of E. Sales
- View & edit data, roll up forecasts, & generate reports only for own data
- International Sales Director, Director of Int'l Sales
- View & edit data, roll up forecasts, & generate reports only for own data
- Western Sales Rep, CA Sales Rep, OR Sales Rep
- View & edit data of users above or at same level
- Eastern Sales Rep, NY Sales Rep, MA Sales Rep
- International Sales Rep, Asian Sales Rep, European Sales Rep
- Can't access data of users above or at same level

Set Up Roles

Don't show this page again

https://accencom-dev-ed.develop.lightning.force.com/lightning/setup/Roles/home

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Roles | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/Roles/home

Setup Home Object Manager

Search Setup

SETUP Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.

Your Organization's Role Hierarchy

Help for this Page

javascript:roleTreeNode.expandAllRoles();

Accenture

- Add Role
- CEO
- CFO
- SVP, Customer Service & Support
- Customer Support, International
- Customer Support, North America
- Installation & Repair Services

Show in tree view

USD/INR +0.07% 16:23 01-07-2024 ENG IN

The image consists of two vertically stacked screenshots of the Salesforce Setup interface.

Screenshot 1: Creating the Role Hierarchy

- Left Panel:** Shows a sidebar with categories like Users, Feature Settings, Sales, Service, and Case Teams, with 'Roles' selected.
- Content Area:** Displays the 'Roles' page with the heading 'Creating the Role Hierarchy'. It shows a tree view of the organization's role hierarchy under 'Accenture':
 - CEO:** Reports to none (selected)
 - CFO:** Reports to CEO
 - COO:** Reports to CEO
 - SVP, Customer Service & Support:** Reports to COO
 - Customer Support, International:** Reports to SVP
 - Customer Support, North America:** Reports to SVP
 - Installation & Repair Services:** Reports to SVP
- Bottom Status Bar:** Shows system information including currency rates (EUR/INR +0.40%), date (01-07-2024), and time (16:24).

Screenshot 2: New Role

- Left Panel:** Same as the first screenshot, with 'Roles' selected in the sidebar.
- Content Area:** Displays the 'New Role' page under 'Role Edit'. The 'Label' field is set to 'owner' and the 'Role Name' field is also set to 'owner'. The 'This role reports to' dropdown is set to 'CEO'. The 'Role Name as displayed on reports' field is empty.
- Bottom Status Bar:** Same as the first screenshot.

B. Creating Employer Roles

Creating another two roles under manager

Click plus on CEO role, and click add role under owner. Give Label as “employer” and Role name gets auto populated. Then click on Save. Repeat the same steps, for another role. Click plus on CEO role, and click plus on owner, and click add role under employer. Give Label as “worker” and Role name gets auto populated. Then click on Save.

The screenshot shows the Salesforce Setup interface for managing roles. The left sidebar is collapsed, and the main content area displays the 'Roles' section under 'SETUP'. The title 'Creating the Role Hierarchy' is at the top. Below it, a note says: 'You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.' A 'Your Organization's Role Hierarchy' tree is shown, starting with 'Accenture' which has a single child 'CEO'. The 'CEO' node has three actions: 'Edit | Del | Assign'. A link 'Add Role' is also present under 'CEO'. The status bar at the bottom right shows '1 ESP - GEO'.

This screenshot shows the same Salesforce Roles setup page, but with a more complex and deeper role hierarchy. The 'Accenture' node now has multiple children: 'CEO', 'COO', 'owner', 'SVP.Customer Service & Support', 'SVP.Human Resources', and 'SVP.Sales & Marketing'. Each of these nodes has its own set of 'Edit | Del | Assign' links and an 'Add Role' link. The status bar at the bottom right shows '1 ENG IN' and the date '01-07-2024'.

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Roles | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/Roles/page?address=%2F00E%2Fe%3Fparent%3D00EdL000003V2SP%26setupid%3DRoles%26retURL%3D%25...

Setup Home Object Manager

Search Setup

SETUP Roles

Role Edit New Role

Role Edit

Label: employer

Role Name: employer

This role reports to: owner

Role Name as displayed on reports:

Save Save & New Cancel

Help for this Page

Didn't find what you're looking for?
Try using Global Search.

Student - Skill Wallet

Roles | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/Roles/home

Setup Home Object Manager

Search Setup

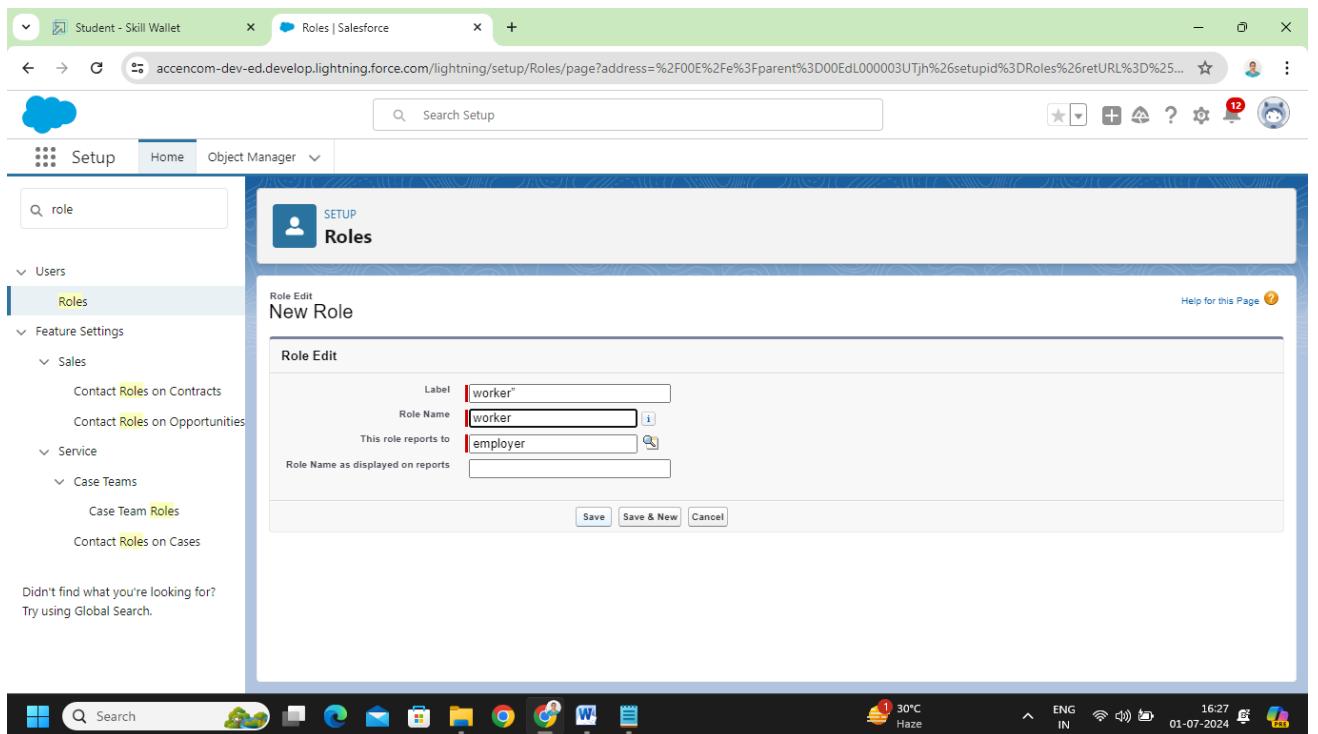
SETUP Roles

You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.

Your Organization's Role Hierarchy

Collapse All Expand All

- Accenture
 - Add Role
 - CEO Edit | Del | Assign
 - Add Role
 - CEO Edit | Del | Assign
 - Add Role
 - COO Edit | Del | Assign
 - Add Role
 - owner Edit | Del | Assign
 - Add Role
 - employer Edit | Del | Assign
 - Add Role
 - SVP, Customer Service & Support Edit | Del | Assign
 - Add Role
 - SVP, Human Resources Edit | Del | Assign
 - Add Role
 - SVP, Sales & Marketing Edit | Del | Assign



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.

A. Create User

Go to setup and type users in quick find box. Select users and click New user.

Fill in the fields

First Name : vicky

Last Name : y

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 : owner

User license : Salesforce

Profiles : owner.

Save it.

The screenshot shows two instances of the Salesforce Setup interface. The top instance displays the 'All Users' page under the 'Users' section of the navigation bar. The page lists several users with their full names, aliases, and usernames. The bottom instance shows the 'New User' edit screen for a user named 'vicky'. The 'General Information' tab is selected, displaying fields for First Name ('vicky'), Last Name ('y'), Alias ('vickyy'), Email ('jaswithaperumal@gmail.com'), Username ('jaswithaperumal@gmail.com'), Nickname ('vky'), Title (empty), Company (empty), Department (empty), and Division (empty). The 'Role' dropdown is set to 'owner', and the 'Active' checkbox is checked. Other optional checkboxes include Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. The status bar at the bottom indicates it's 30°C Haze, ENG IN, and the date is 01-07-2024.

B. Creating Another Users

Go to setup and type users in quick find box. Select users and click New user.

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.

User
ram ram

Name: ram ram
Alias: rram
Email: iaswithaperumal@gmail.com [Verify]
Username: rnam@jas.com
Nickname: rram
Title:
Company:
Department:
Division:
Address: 1-19, Errepalli, Irala
Chittoor 517130
Andhra Pradesh
India
Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)

Role: employer
User License: Salesforce Platform
Profile: Standard Platform User
Active: ✓
Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
Site.com Publisher User:

Go to setup and type users in quick find box. Select users and click New user.

Fill in the fields

First Name : ragu

Last Name : raj

Alias : Give a Alias Name

Email id : Give your Personal Email id

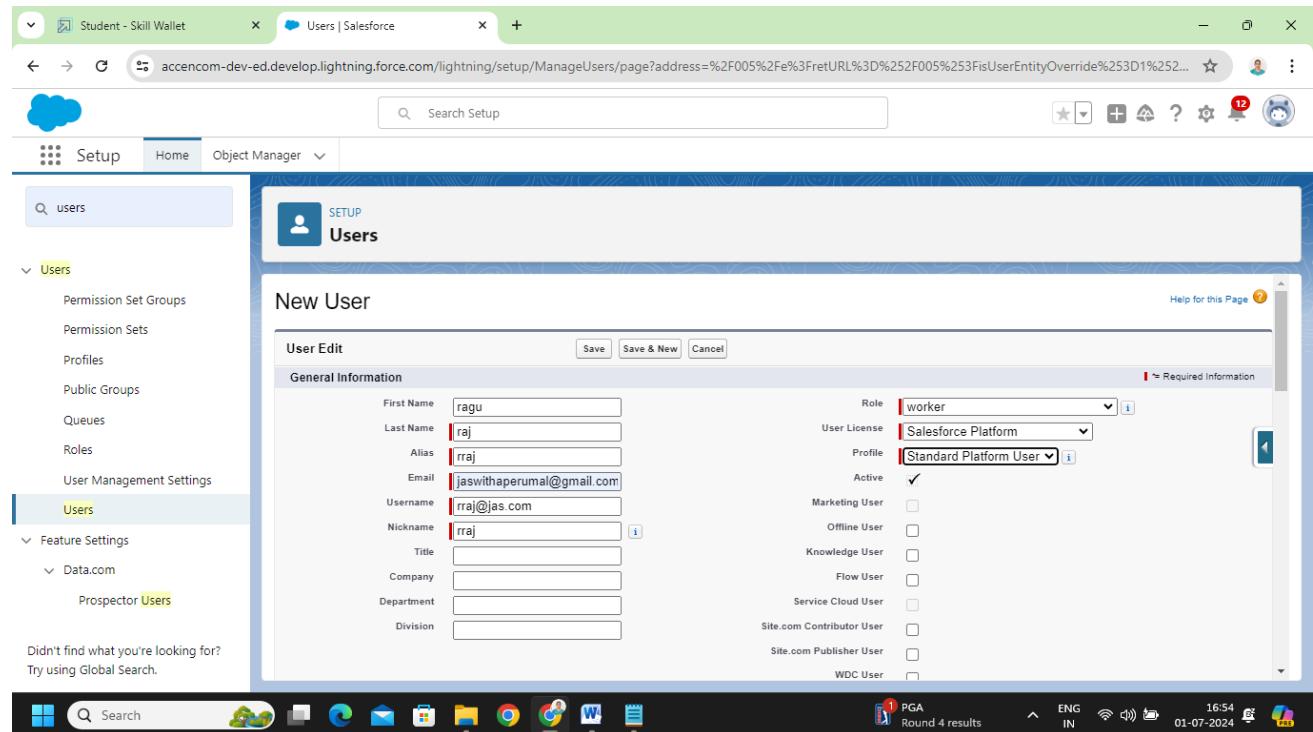
Username : Username should be in this form: text@text.text

Nick Name : Give a Nickname

Role : worker

User license : Salesforce platform

Profiles : standard platform user.



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.

A. Creating OWD Setting

Go to setup, type "sharing settings " in quick search and Click edit. Scroll down, change the default internal access to "public read-only" for rice mill and supplier object. Click save. Extra information, By these every profile has their own access, according to their profile. 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 two views of the Salesforce Sharing Settings page. The top view displays the 'Organization-Wide Defaults' section, which lists various objects with their default internal and external access levels. The bottom view shows the 'Sharing Rules' section, where specific sharing rules are defined for different objects like Tableau Host Mapping, Waitlist, and Work Order.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Public Read/Write	Private	<input checked="" type="checkbox"/>

Sharing Rules

Sharing Criteria	Public Read/Write	Private	Secure guest user record access	Require permission to view record names in lookup fields
Tableau Host Mapping	<input type="button" value="Public Read/Write"/>	<input type="button" value="Private"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Waitlist	<input type="button" value="Public Read Only"/>	<input type="button" value="Private"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Web Cart Document	<input type="button" value="Private"/>	<input type="button" value="Private"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work Order	<input type="button" value="Private"/>	<input type="button" value="Private"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work Plan	<input type="button" value="Private"/>	<input type="button" value="Private"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work Plan Template	<input type="button" value="Private"/>	<input type="button" value="Private"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work Step Template	<input type="button" value="Private"/>	<input type="button" value="Private"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work Type	<input type="button" value="Private"/>	<input type="button" value="Private"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work Type Group	<input type="button" value="Public Read/Write"/>	<input type="button" value="Private"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
rice mill	<input type="button" value="Public Read Only"/>	<input type="button" value="Private"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
supplier	<input type="button" value="Public Read Only"/>	<input type="button" value="Private"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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 analyze your data. Types of Reports in Salesforce are Tabular, Summary, Matrix and Joined Reports.

A. Create Report

Go to the app and click on the reports tab. Click New Report. Select for report type, search for “rice mill with consumers” click on it. And click on start report. 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

Remove the unnecessary fields. Select the fields that are mentioned below in the GROUP ROWS section.

Rice taken by shops.

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

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Sharing Settings | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/page?address=%2Fp%2Fown%2FOrgSharingDetail%3D%252Fsetup%252Fhome%2...

Setup Home Object Manager

Search Setup

App Launcher

agents work with multiple records...

accounts, leads, opportunities, and...

Lightning Experience

Digital Experiences

Manage content and media for all of your sites.

Salesforce Scheduler Setup

Set up personalized appointment scheduling.

Bolt Solutions

Discover and manage business solutions designed for your industry.

Automation

Automate business processes and repetitive tasks.

MY RICE

All Items

Accounts Contacts Learning Refunds

Alternative Payment Methods

	Account and Contract	Public Read/Write	Private	
Contact	Controlled by Parent	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	Controlled by Parent	✓

accencom-dev-ed.develop.lightning.force.com/lightning/app/06mdl000003iEvQ...

Search

Student - Skill Wallet Reports | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

Search...

MY RICE supplier rice mills consumers rice details Reports Dashboards

Reports Recent 0 items

REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Recent reports appear here
Go to All Reports to see what's available.
[View All Reports](#)

30°C Haze ENG IN 17:29 01-07-2024

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Report Builder | Salesforce

accencom-dev-ed.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJyZXVcnRzOnJlcG9ydE1aWxkZXIiLCJhdHRyaWJ1dGVzIjp7InJY29yZEIklijoiwiibmV3Um...

MY RICE supplier rice mills consumers rice details Reports Dashboards

Create Report

Category

- Recently Used
- All
- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities

Select a Report Type

Showing results for ri

Report Type Name	Category
Solution Categories	Standard
Price Books with Products	Standard
Identity Verification Methods	Standard
supplier with rice details and rice mills	Standard
rice mills	Standard
rice mills with consumers	Standard

Details

rice mills with consumers Standard Report Type

Start Report

Details Fields (32)

Created By You No Reports Yet

Created By Others No Reports Yet

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Report Builder | Salesforce

accencom-dev-ed.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJyZXVcnRzOnJlcG9ydE1aWxkZXIiLCJhdHRyaWJ1dGVzIjp7InJY29yZEIklijoiwiibmV3Um...

MY RICE supplier rice mills consumers rice details Reports Dashboards

REPORT New rice mills with consumers Report **rice mills with consumers**

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

Outline **Filters** 1

Groups GROUP ROWS Add group...

	rice mill: rice mill Name	consumer: consumer Name
1	rice-002	consumers-002
2	rice-009	consumers-003
3	rice-006	consumers-004
4	rice-001	consumers-001
5	rice-002	consumers-008
6	rice-003	consumers-005
7	rice-006	consumers-006
8	rice-002	consumers-007
9	rice-005	consumers-009
10	rice-010	consumers-010
11	rice-014	consumers-011

Columns Add column...

rice mill: rice mill Name consumer: consumer Name

30°C Haze ENG IN 17:29 01-07-2024

30°C Haze ENG IN 17:30 01-07-2024

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Report Builder | Salesforce

accencom-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOijyZXBvcnRzOnJlcG9ydE1aWxkZXliLCJhdHRyaWJ1dGVzIjp7InJIY29yZEIklijoiwiibmV3Um... ☆

MY RICE supplier rice mills consumers rice details Reports Dashboards

REPORT New rice mills with consumers Report rice mills with consumers

To see the latest edits, refresh the preview. Refresh

rice mill: rice mill Name consumer: consumer Name

	rice mill: rice mill Name	consumer: consumer Name
1	rice-002	consumers-002
2	rice-009	consumers-003
3	rice-006	consumers-004
4	rice-001	consumers-001
5	rice-002	consumers-008
6	rice-003	consumers-005
7	rice-006	consumers-006
8	rice-002	consumers-007
9	rice-005	consumers-009
10	rice-010	consumers-010
11	rice-014	consumers-011

Row Counts Detail Rows Subtotals Grand Total

Fields Outline Filters Add group... Rice taken by shops GROUP COLUMNS Add group... Columns Add column... Consumer Name X Rice type X # rice price/kg X Mode of payment X # Amount Paid X

Update Preview Automatically

30°C Haze ENG IN 17:31 01-07-2024

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Report Builder | Salesforce

accencom-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOijyZXBvcnRzOnJlcG9ydE1aWxkZXliLCJhdHRyaWJ1dGVzIjp7InJIY29yZEIklijoiwiibmV3Um... ☆

MY RICE supplier rice mills consumers rice details Reports Dashboards

REPORT New rice mills with consumers Report rice mills with consumers

Save Report

* Report Name range of amount per day

Report Unique Name range_of_amount_per_day_br8

Report Description

Cancel Save

Row Counts Detail Rows Subtotals Grand Total

Fields Outline Filter Add group... Rice taken by shops GROUP COLUMNS Add group... Columns Add column... Consumer Name X Rice type X # rice price/kg X Mode of payment X # Amount Paid X

Update Preview Automatically

30°C Haze ENG IN 17:32 01-07-2024

The screenshot shows a Salesforce Analytics report titled "range of amount per day". The report displays data for "rice mills with consumers". The main statistics shown are:

- Total Records: 11
- Total rice price/kg: 13,270
- Total Amount Paid: 38,43,800.00

The report table includes columns for "Rice taken by shops", "Consumer Name", "Rice type", "rice price/kg", "Mode of payment", and "Amount Paid". The data is grouped by shop and consumer, with subtotals for each group.

Rice taken by shops	Consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
100 (1)	Jess Fest	normal rice	400	UPI	40,000.00
Subtotal			400		40,000.00
200 (3)	Uzumaki Naruto	basmati	10,000	Cash	20,00,000.00
	Jack Perl	basmati	100	Credit card	2,00,000.00
	Tsunade Senju	basmati	1,000	Credit card	2,00,000.00
Subtotal			11,100		22,20,000.00
250 (1)	Hyuga Hinata	normal rice	1,000	UPI	2,50,000.00
Subtotal			1,000		2,50,000.00
260 (1)	Kurama Uzumaki	normal rice	500	UPI	1,30,000.00
Subtotal			500		1,30,000.00

At the bottom of the report, there are buttons for "Row Counts", "Detail Rows", "Subtotals", and "Grand Total".

B. Sharing Report To Owner

Click edit drop down and select subscribe option. Set frequency as “Daily” and time as 8:00 AM. After selecting the run report as a “another person” select your personal account or whom you want to send that mail to. Click save.

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

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range of amount per day | Sales

accencom-dev-ed.develop.lightning.force.com/lightning/r/Report/00OdL000003nX4LUAU/view?queryScope=userFolders

MY RICE supplier rice mills consumers rice details Reports Dashboards

Report: rice mills with consumers range of amount per day

Total Records Total rice price/kg Total Amount Paid
11 13,270 38,43,800.00

<input type="checkbox"/> Rice taken by shops ↑	Consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
<input type="checkbox"/> 100 (1)	Jess Fest	normal rice	400	UPI	40,000.00
Subtotal			400		40,000.00
<input type="checkbox"/> 200 (3)	Uzumaki Naruto	basmati	10,000	Cash	20,00,000.00
	Jack Perl	basmati	100	Credit card	20,000.00
	Tsunade Senju	basmati	1,000	Credit card	2,00,000.00
Subtotal			11,100		22,20,000.00
<input type="checkbox"/> 250 (1)	Hyuga Hinata	normal rice	1,000	UPI	2,50,000.00
Subtotal			1,000		2,50,000.00
<input type="checkbox"/> 260 (1)	Kurama Uzumaki	normal rice	500	UPI	1,30,000.00
Subtotal			500		1,30,000.00
<input type="checkbox"/> 340 (1)	Vivi Neftari	basmati	370	Debit card	1,25,800.00

https://accencom-dev-ed.develop.lightning.force.com/reports/lightningReportApp.app?reportId=00OdL000003nX4LUAU&isView=true&filterValues=%7B%7D#

ENG IN 30°C Haze 01-07-2024

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range of amount per day | Sales

accencom-dev-ed.develop.lightning.force.com/lightning/r/Report/00OdL000003nX4LUAU/view?queryScope=userFolders

MY RICE supplier

Report: rice mills with consumers range of amount per day

Total Records Total rice price/kg Total Amount Paid
11 13,270 38,43,800.00

<input type="checkbox"/> Rice taken by shops ↑	Consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
<input type="checkbox"/> 100 (1)	Jess Fest	normal rice	400	UPI	40,000.00
Subtotal			400		40,000.00
<input type="checkbox"/> 200 (3)	Uzumaki Naruto	basmati	10,000	Cash	20,00,000.00
	Jack Perl	basmati	100	Credit card	20,000.00
	Tsunade Senju	basmati	1,000	Credit card	2,00,000.00
Subtotal			11,100		22,20,000.00
<input type="checkbox"/> 250 (1)	Hyuga Hinata	normal rice	1,000	UPI	2,50,000.00
Subtotal			1,000		2,50,000.00
<input type="checkbox"/> 260 (1)	Kurama Uzumaki	normal rice	500	UPI	1,30,000.00
Subtotal			500		1,30,000.00
<input type="checkbox"/> 340 (1)	Vivi Neftari	basmati	370	Debit card	1,25,800.00

Edit Subscription

Settings

Frequency: Daily

Time: 8:00 am

Attachment: Attach File

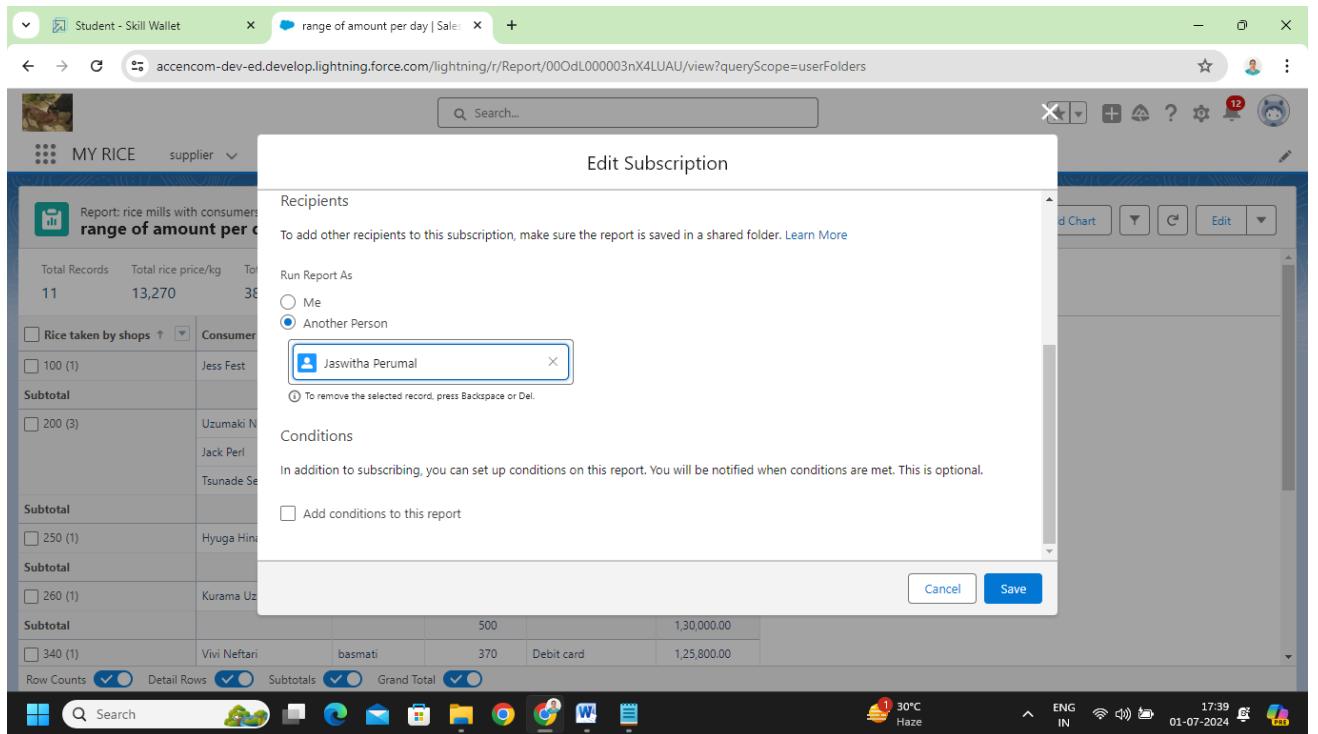
Recipients:

To add other recipients to this subscription, make sure the report is saved in a shared folder. Learn More

Run Report As: Manually

Cancel Save

ENG IN 30°C Haze 01-07-2024



C. Create A Report Folder

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

Student - Skill Wallet range of amount per day | Sales

accencom-dev-ed.develop.lightning.force.com/lightning/r/Report/00OdL000003nX4LUAU/view?queryScope=userFolders

MY RICE supplier rice mills consumers rice details Reports Dashboards

App Launcher

repo

Items

Rice type	rice price/kg	Mode of payment	Amount Paid
normal rice	400	UPI	40,000.00
	400		40,000.00
200 (3)	Uzumaki Naruto basmati	10,000 Cash	20,00,000.00
	Jack Perl basmati	100 Credit card	20,000.00
	Tsunade Senju basmati	1,000 Credit card	2,00,000.00
Subtotal		11,100	22,20,000.00
250 (1)	Hyuga Hinata normal rice	1,000 UPI	2,50,000.00
Subtotal		1,000	2,50,000.00
260 (1)	Kurama Uzumaki normal rice	500 UPI	1,30,000.00
Subtotal		500	1,30,000.00
340 (1)	Vivi Neftari basmati	370 Debit card	1,25,800.00

https://accencom-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

Student - Skill Wallet Reports | Salesforce

accencom-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

MY RICE supplier rice mills consumers rice details Reports Dashboards

Reports

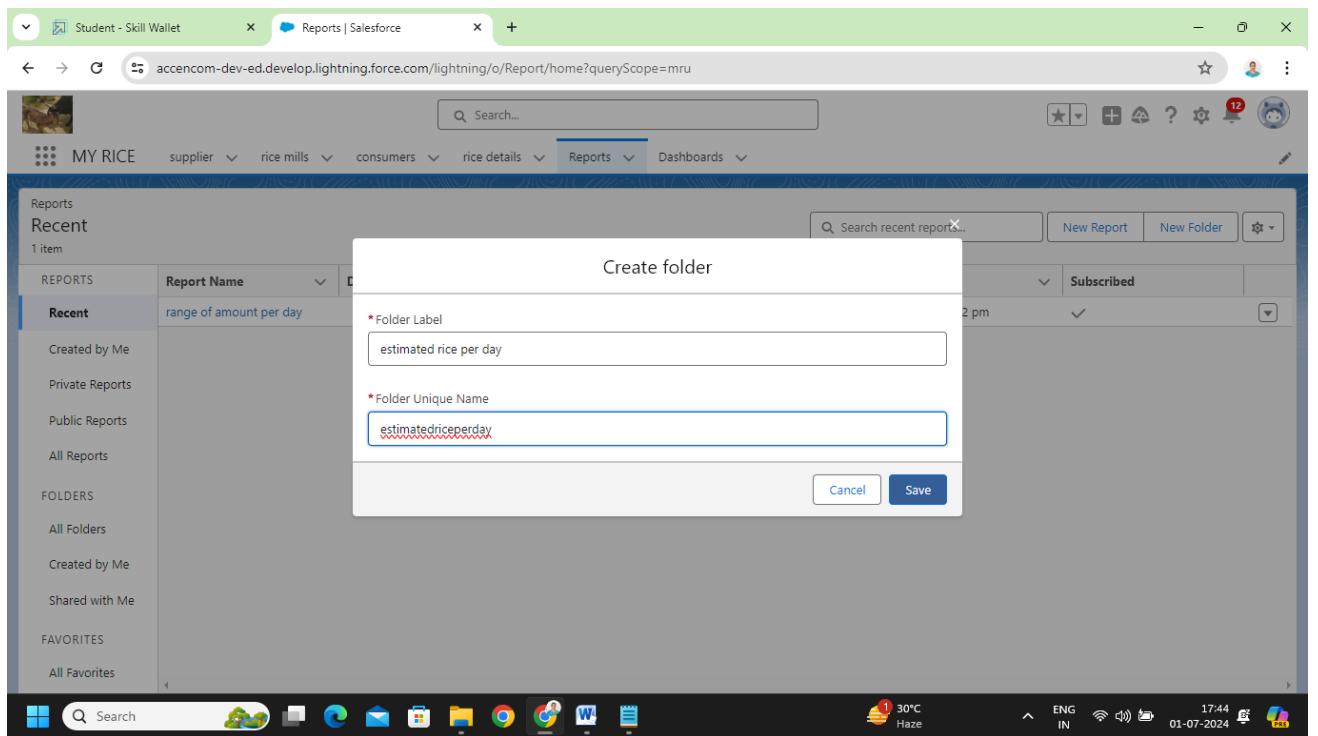
Recent

1 item

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	range of amount per day		Private Reports	Jaswitha Perumal	1/7/2024, 5:32 pm	

Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites

30°C Haze ENG IN 17:44 01-07-2024



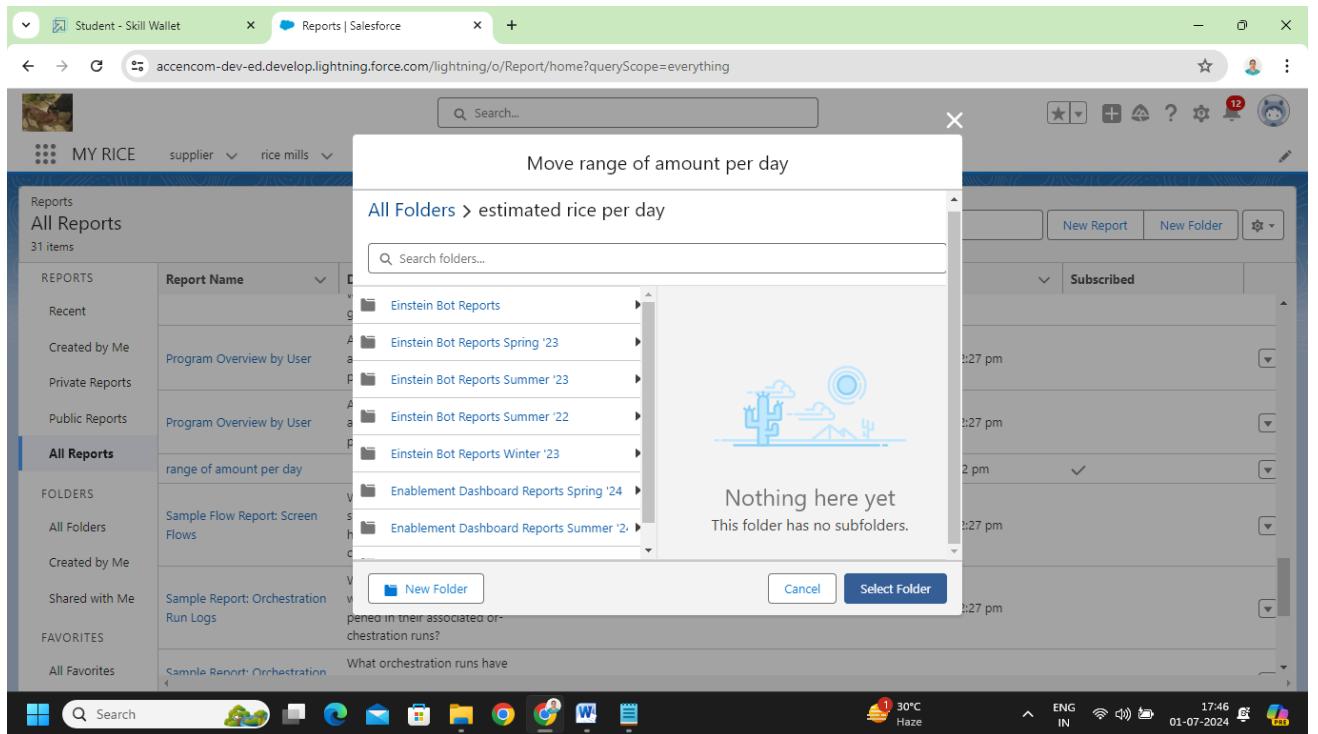
Navigate to app launcher and click reports on that. Click all reports. Select the range of amount per day drop down in that click move. Select estimated rice per day folder and select folder.

Screenshot of the Salesforce Reports home page showing a list of reports. A context menu is open over the first report, listing options: Run, Edit, Subscribe, Export, Delete, Add to Dashboard, Favorite, and Move.

Report Name	Description	Folder	Created By	Created On	Subscribed
Program Overview by User	Analyze how different users are progressing towards a program and its outcome.	Enablement Dashboard Reports Spring '24	Automated Process	28/6/2024, 12:27 pm	
range of amount per day	range of amount per day	Private Reports	Jaswitha Perumal	1/7/2024, 5:32 pm	<input checked="" type="checkbox"/>
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	28/6/2024, 12:27 pm	
Sample Report: Orchestration Run Logs	What orchestration run logs were created and what happened in their associated orchestration runs?	Public Reports	Automated Process	28/6/2024, 12:27 pm	
Sample Report: Orchestration Runs	What orchestration runs have been created and what's the current status of each run?	Public Reports	Automated Process	28/6/2024, 12:27 pm	
Sample Report: Orchestration	What orchestration stage runs have been created and what's	Public Reports	Automated Process	28/6/2024, 12:27 pm	

Screenshot of the Salesforce Reports home page showing a modal dialog titled "Move range of amount per day". The dialog lists available folders for moving the report.

Report Name	Folder	Created On	Subscribed
All Folders	Einstein Bot Reports Spring '23	27/6/2024, 12:27 pm	
Created by Me	Einstein Bot Reports Summer '23	27/6/2024, 12:27 pm	
Shared with Me	Einstein Bot Reports Summer '22	27/6/2024, 12:27 pm	
Private Reports	Einstein Bot Reports Winter '23	27/6/2024, 12:27 pm	
Public Reports	Enablement Dashboard Reports Spring '24	27/6/2024, 12:27 pm	
range of amount per day	Enablement Dashboard Reports Summer '24	27/6/2024, 12:27 pm	
Sample Flow Report: Screen Flows	estimated rice per day	27/6/2024, 12:27 pm	



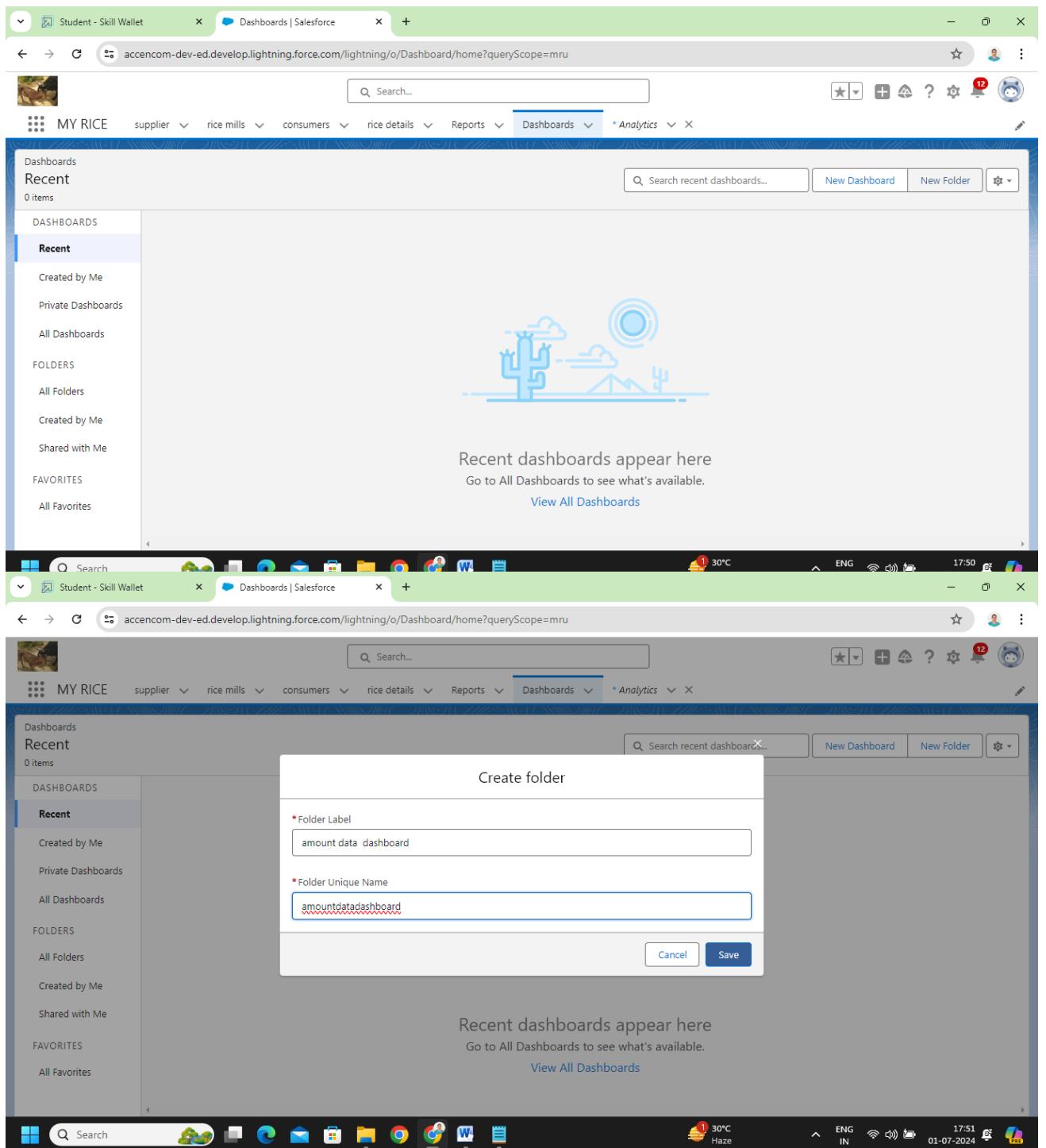
Note: if you want to see the report which you have created then go to reports - all folders - estimated rice per day - your report will appear in this way.

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.

A. Create Dashboard Folder

Click on the app launcher and search for the dashboard. Click on the dashboard tab. Click the new folder, give the folder label as “amount data dashboard”. Folder unique names will be auto populated. Click save.



B. Create Dashboard

Go to the app and click on the Dashboards tabs. Click on New Dashboard and give a Name and select the folder that was created, and click on create. Select add component. Select a Report and click on select.

Display as >> vertical bar chart

X-axis >> rice taken by shops

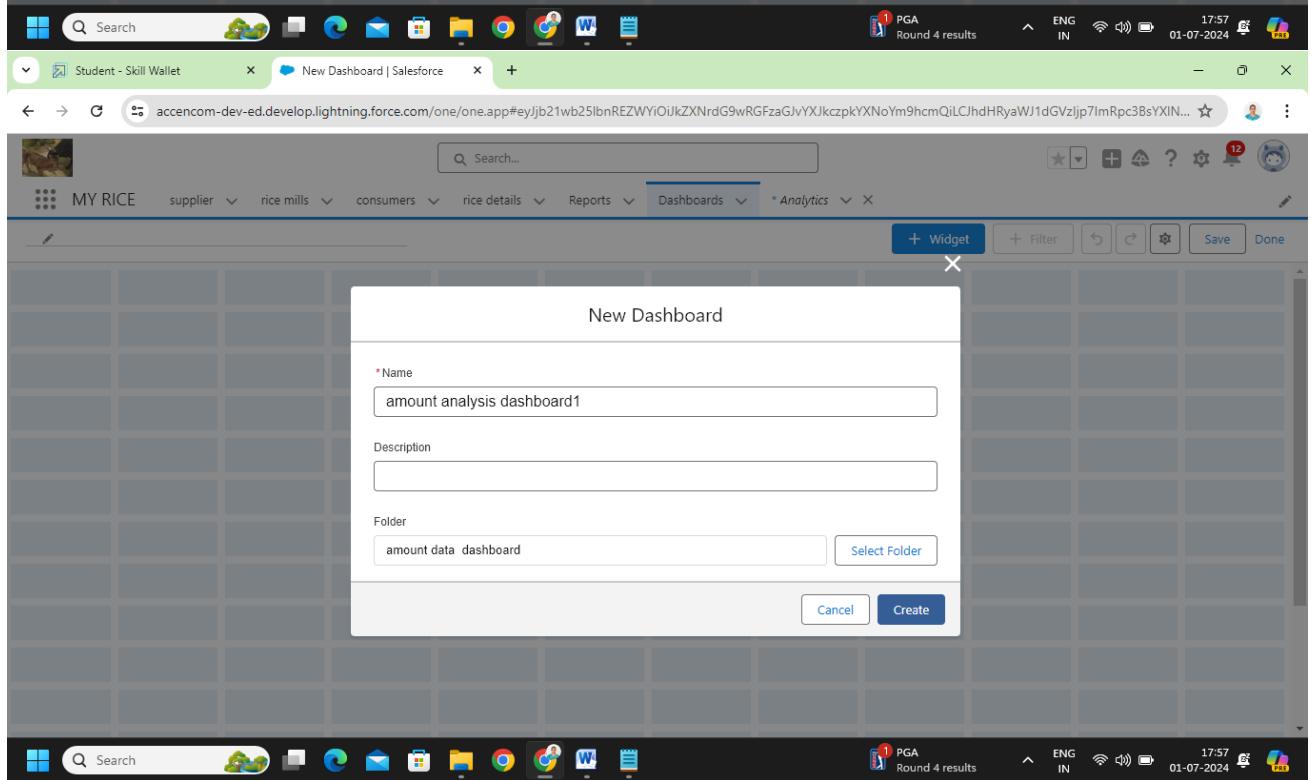
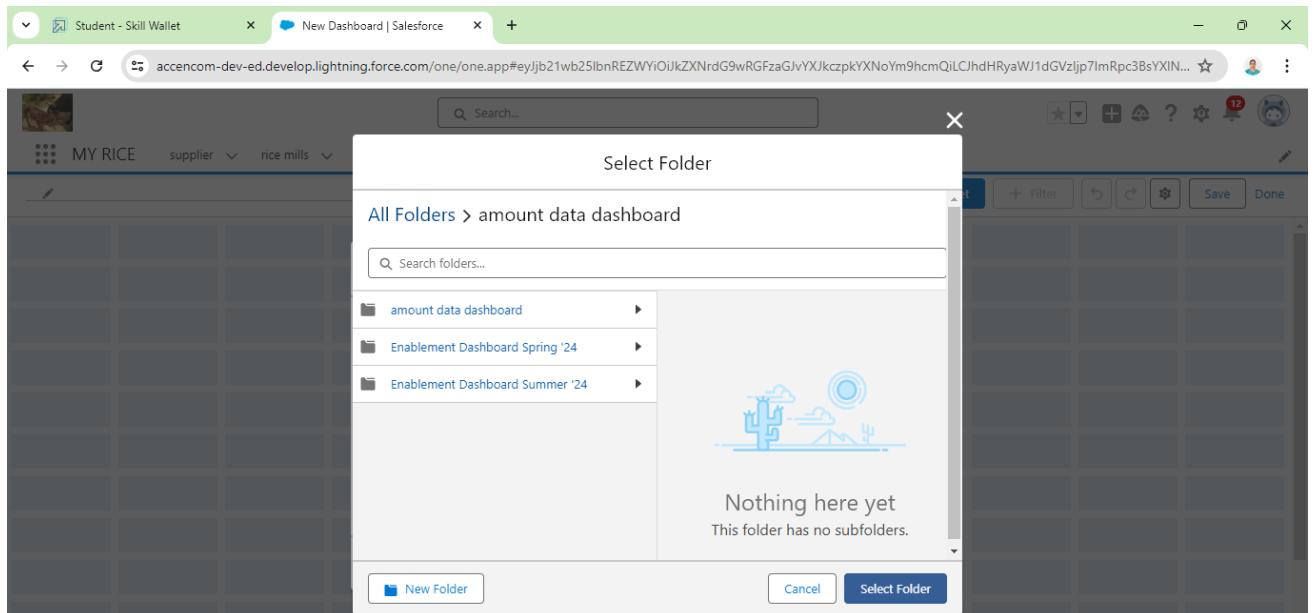
Y-axis >> sum of amount

Y-axis range >> automatic

Sort by >> rice taken by shops

Component theme >> dark.

The screenshot shows a Salesforce interface with a dark component theme. At the top, there are two tabs: "Student - Skill Wallet" and "Dashboards | Salesforce". Below the tabs is a navigation bar with links: MY RICE, supplier, rice mills, consumers, rice details, Reports, Dashboards, Analytics, and a gear icon. A search bar is also present. The main area displays a "Recent" dashboard with a blue header and sidebar. The sidebar lists categories like DASHBOARDS, FOLDERS, and FAVORITES. The main content area features a stylized sun and clouds illustration and a message: "Recent dashboards appear here. Go to All Dashboards to see what's available. View All Dashboards". On the right side of the dashboard, there are various icons and a weather widget showing 30°C and Haze. A "Select Folder" modal is open in the foreground, titled "Select Folder". It contains a search bar and a list of folders under "All Folders": "All Folders" (with a sub-item "amount_data_dashboard"), "Created by Me", "Shared with Me", and "Private Dashboards". At the bottom of the modal are "New Folder", "Cancel", and "Select" buttons. The status bar at the bottom of the screen shows system information: ENG IN, 17:55, 01-07-2024, and a PGA Round 4 results notification.



The screenshot shows a Salesforce Lightning dashboard titled "amount analysis dashboard1". A context menu is open over a blank grid area, displaying options: "+ Widget", "Chart or Table", "Text", and "Image".

The dashboard interface includes a top navigation bar with links for "MY RICE", "supplier", "rice mills", "consumers", "rice details", "Reports", "Dashboards", "Analytics", and a search bar. Below the navigation is a large grid area for placing widgets.

At the bottom of the screen, there is a taskbar with various application icons and system status indicators, including "ESP - GEO Game score", "ENG IN", and a date/time stamp "01-07-2024 17:59".

A modal dialog box titled "Select Report" is displayed. It contains a sidebar with sections for "Recent", "Created by Me", "Private Reports", "Public Reports", and "All Reports". The main area shows a list of reports under "Recent", with one item highlighted: "range of amount per day" created by Jaswita Perumal on 01-Jul-2024 at 5:46 pm. A search bar and a "Reports and Folders" button are also present. At the bottom right are "Cancel" and "Select" buttons.

Student - Skill Wallet

amount analysis dashboard1 | S

accencom-dev-ed.develop.lightning.force.com/lightning/r/

Dashboard/01ZdL000001BC8XUAW/view?queryScope=userFolders

MY RICE supplier rice mills consumers rice details Reports Dashboards Analytics

amount analysis dashboard1

Add Widget

Report range of amount per day

Use chart settings from report

Display As

Rice taken by shops

X-Axis

Preview

range of amount per day

Sum of rice price/Kg

Rice taken by shops	Sum of rice price/Kg
100	400
200	11k
250	1k
300	400
340	400
370	400
400	400
450	400
500	400
580	400
640	400
780	600

Rice taken by shops

View Report (range of amount per day)

Cancel Add

Search

ENG IN 18:00 01-07-2024

Student - Skill Wallet

amount analysis dashboard1 | S

accencom-dev-ed.develop.lightning.force.com/lightning/r/

Dashboard/01ZdL000001BC8XUAW/view?queryScope=userFolders

MY RICE supplier rice mills consumers rice details Reports Dashboards Analytics

amount analysis dashboard1

Add Widget

X-Axis

Rice taken by shops

V-Axis

Sum of Amount Paid

+ Measure

Display Units

Shortened Number

Show Values

Y-Axis Range

Automatic

Custom

Preview

range of amount per day

Sum of Amount Paid

Rice taken by shops	Sum of Amount Paid
100	40k
200	2.2M
250	250k
300	1.3M
340	1.2M
370	1.8M
400	74k
450	250k
500	468k

Rice taken by shops

View Report (range of amount per day)

Cancel Add

Search

1 Sunset coming 7:24 pm ENG IN 18:00 01-07-2024

Student - Skill Wallet

amount analysis dashboard1 | S

accencom-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01ZdL000001BC8XUAW/view?queryScope=userFolders

MY RICE supplier rice mills consumers rice details Reports Dashboards Analytics

amount analysis dashboard1

Add Widget

Y-Axis
Sum of Amount Paid
+ Measure

Display Units
Shortened Number
Show Values

Y-Axis Range
Automatic
Custom

Decimal Places
Automatic

Preview

range of amount per day

Sum of Amount Paid

Rice taken by shops

View Report (range of amount per day)

Cancel Add

Search

Student - Skill Wallet

amount analysis dashboard1 | S

accencom-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01ZdL000001BC8XUAW/view?queryScope=userFolders

MY RICE supplier rice mills consumers rice details Reports Dashboards Analytics

amount analysis dashboard1

Add Widget

Decimal Places
Automatic

Sort By
Rice taken by shops

Custom Link

Max Groups Displayed
100

Title
range of amount per day

Preview

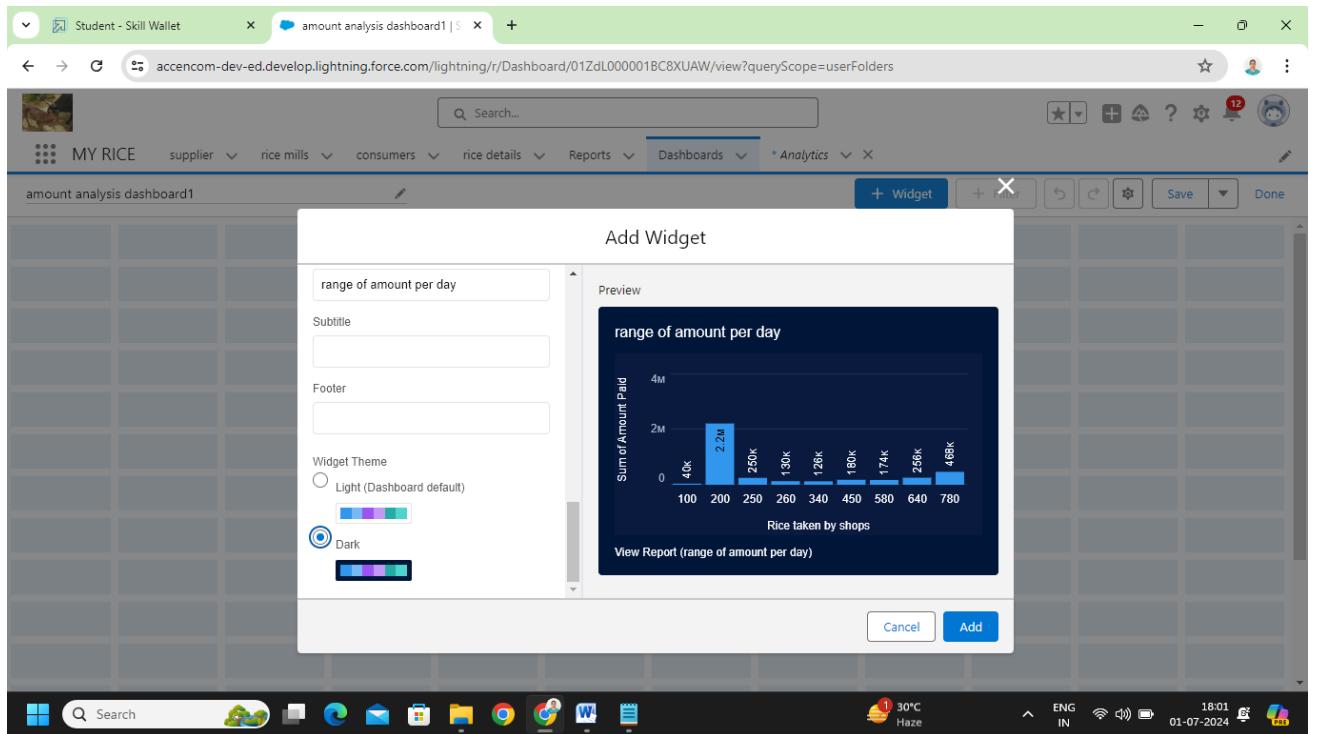
range of amount per day

Sum of Amount Paid

Rice taken by shops

View Report (range of amount per day)

Cancel Add



Add the component. Again select add component with above same steps

display as donut chart

sort by >> sum of amount

title>>range of amount per day

component theme dark

Click add. Click save and done.

Screenshot of a Salesforce Lightning dashboard titled "amount analysis dashboard1". The dashboard includes a bar chart titled "range of amount per day" showing the sum of amount paid for different rice quantities taken by shops. The chart has a y-axis from 0 to 2.4M and an x-axis from 100 to 780. The data points are:

Rice taken by shops	Sum of Amount Paid
40k	40k
200	2.2M
250	250k
260	130k
340	126k
450	180k
580	174k
640	256k
780	468k

A tooltip for the first bar (40k) says "View Report (range of amount per day)". A context menu is open over the dashboard header, showing options: + Widget, + Filter, Save, and Done.

The dashboard URL is: <https://accencom-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01ZdL000001BC8XUAW/view?queryScope=userFolders>

Below the dashboard, a Windows taskbar shows various application icons and system status.

The screenshot is part of a larger sequence where a donut chart is being added to the dashboard. The "Add Widget" dialog is open, showing the "range of amount per day" report selected. The preview section shows a donut chart with a total value of 3.8M and segments for 200, 250, 450, 580, 640, and 780. The "Add" button is visible at the bottom right of the dialog.

Student - Skill Wallet

amount analysis dashboard1

accencom-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01ZdL000001BC8XUAW/view?queryScope=userFolders

MY RICE supplier rice mills consumers rice details Reports Dashboards Analytics

amount analysis dashboard1

range of amount per day

Sum of Amount Paid

Rice taken by shops

2.4M
1.8M
1.2M
600k
0 40k 200 250k 130k 126k 180k

View Report (range of amount per day)

Add Widget

Value: Sum of Amount Paid

Sliced By: Rice taken by shops

Display Units: Shortened Number

Show Values
 Show Percentages
 Combine Small Groups into "Others"
 Show Total

Decimal Places:

Preview: range of amount per day

Sum of Amount Paid

Rice taken by shops

3.8M

200 250 450 580 640 780

View Report (range of amount per day)

Cancel Add

Student - Skill Wallet

amount analysis dashboard1

accencom-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01ZdL000001BC8XUAW/view?queryScope=userFolders

MY RICE supplier rice mills consumers rice details Reports Dashboards Analytics

amount analysis dashboard1

range of amount per day

Sum of Amount Paid

Rice taken by shops

2.4M
1.8M
1.2M
600k
0 40k 200 250k 130k 126k 180k

View Report (range of amount per day)

Add Widget

Decimal Places: Automatic

Sort By: Sum of Amount Paid

Custom Link:

Max Values Displayed: 6

Title: range of amount per day

Preview: range of amount per day

Sum of Amount Paid

Rice taken by shops

3.8M

200 250 450 580 640 780

View Report (range of amount per day)

Cancel Add

Student - Skill Wallet

amount analysis dashboard1 | S X

accencom-dev-ed.develop.lightning.force.com/lightning/r/

Dashboard/01ZdL000001BC8XUAW/view?queryScope=userFolders

MY RICE supplier rice mills consumers rice details Reports Dashboards Analytics

amount analysis dashboard1

range of amount per day

Sum of Amount Paid

Rice taken by shops

View Report (range of amount per day)

Add Widget

Footer

Legend Position Right

Widget Theme Dark

Preview

range of amount per day

Sum of Amount Paid

Rice taken by shops

3.8M

View Report (range of amount per day)

Cancel Add

Student - Skill Wallet

amount analysis dashboard1 | S X

accencom-dev-ed.develop.lightning.force.com/lightning/r/

Dashboard/01ZdL000001BC8XUAW/view?queryScope=userFolders

MY RICE supplier rice mills consumers rice details Reports Dashboards Analytics

amount analysis dashboard1

rice taken

Sum of Amount Paid

Rice taken by shops

View Report (range of amount per day)

range of amount per day

Sum of Amount Paid

Rice taken by shops

3.8M

View Report (range of amount per day)

ENG IN 30°C Haze 18:08 01-07-2024

7/12/24, 3:01 PM

Gmail - Report results (range of amount per day)



Jaswitha P <jaswithaperumal@gmail.com>

Report results (range of amount per day)

Jaswitha Perumal <jaswithaperumal@gmail.com>
To: "jaswithaperumal@gmail.com" <jaswithaperumal@gmail.com>

Tue, Jul 2, 2024 at 8:00 AM

range of amount per day

As of 2/7/24 at 8:00 AM · Viewing as Jaswitha Perumal

[OPEN IN SALESFORCE](#)

Details

Filters

[My rice mills](#) [rice mill: Created Date: All time](#)

Summary

Total Records	Total rice price/kg	Total Amount Paid
11	13,270	38,43,800.00

Rice taken by shops ↑	Consumer Name	Rice type	rice price/kg Sum	Mode of payment	Amount Paid Sum
100 (1 record)	Jess Fest	normal rice	400	UPI	40,000.00
			400		40,000.00
200 (3 records)	Uzumaki Naruto	basmati	10,000	Cash	20,00,000.00
	Jack Perl	basmati	100	Credit card	20,000.00
	Tsunade Senju	basmati	1,000	Credit card	2,00,000.00
			11,100		22,20,000.00
250 (1 record)	Hyuga Hinata	normal rice	1,000	UPI	2,50,000.00
			1,000		2,50,000.00
260 (1 record)	Kurama Uzumaki	normal rice	500	UPI	1,30,000.00
			500		1,30,000.00
340 (1 record)	Vivi Neftari	basmati	370	Debit card	1,25,800.00
			370		1,25,800.00

<https://mail.google.com/mail/u/0/?ik=b99308bb9c&view=pt&search=all&permmsgid=msg-f:1803432664253368686&simpl=msg-f:1803432664253368686> 1/2

7/12/24, 3:01 PM

Gmail - Report results (range of amount per day)

450 (1 record)	Uchiha Obito	basmati	400	Debit card	1,80,000.00
			400		1,80,000.00
580 (1 record)	Jiraiya Pervy sage	basmati	300	Credit card	1,74,000.00
			300		1,74,000.00
640 (1 record)	Hatake Kakashi	normal rice	400	Net banking	2,56,000.00
			400		2,56,000.00
780 (1 record)	Momonosuke Oden	normal rice	600	Cash	4,68,000.00
			600		4,68,000.00
Grand Total (11 records)			13,270		38,43,800.00

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You will get the report daily for the given mail.