

A CRM APPLICATION FOR WHOLESALE RICE MILL

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

Features and Functionality:

Reporting and Dashboards: The application can generate detailed reports and analytics regarding daily how much rice sold and total income per daily, revenue generated, popular amenities, and most buyed customers. Easy to understand the data to the owner, improving resource allocation, and planning future development.

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

A cross-object formula field: It is a formula field that references fields from another object in Salesforce. This type of formula allows users to calculate the total amount from number of rice taken*price/kg and it displays the total amount I have to pay.

Validation rules: 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.so , In this project i gave Isblank formula.lsblank formula is used to verify whether it is blank it shows error.

Permission sets: Organization Wide Defaults(OWD) in salesforce is the baseline level of access that the most restricted user should have. Organizational Wide Defaults are used to restrict access.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.

TASK 1 :

What Is an Object?

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

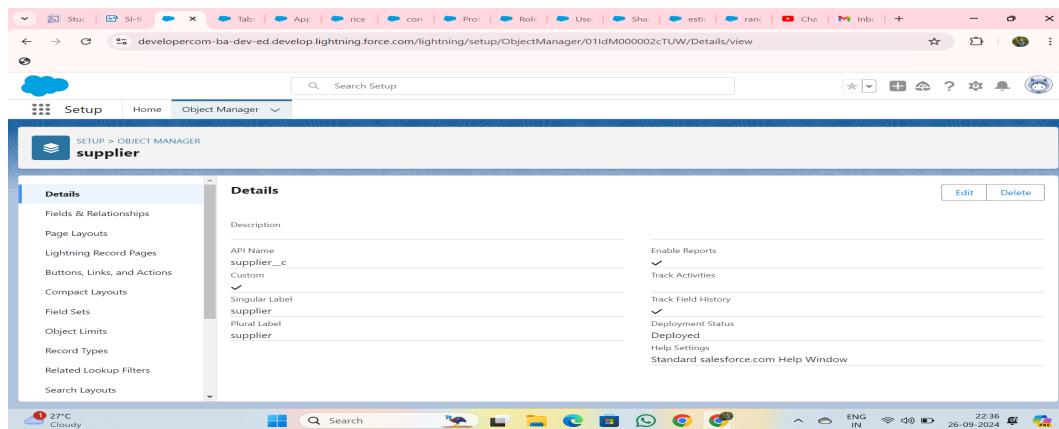
Salesforce objects are of two types:

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

Create Supplier Object

To create an object:

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



Create Rice mill Object

To create an object:

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Stud, SL-9, Tabs, App, rice, con, Prof, Rol, Use, Sha, esti, rang, Cha, M, Inbx, and a plus sign. The URL in the browser is developercom-ba-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01ldM000002cUgf/Details/view. The main header has a cloud icon, a search bar with 'Search Setup', and various configuration icons. The left sidebar shows navigation links: Setup, Home, Object Manager, and a dropdown menu. The main content area is titled 'SETUP > OBJECT MANAGER' and 'rice mill'. It displays two tabs: 'Details' and 'Fields & Relationships'. The 'Details' tab contains fields for Description, API Name (rice_mill_c), Singular Label (rice mill), Plural Label (rice mills), Enable Reports (checked), Track Activities, Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). The 'Fields & Relationships' tab lists various settings like Page Layouts, Lightning Record Pages, Buttons, Links, Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. At the bottom, there are system status icons (CPU, RAM, Disk, Network) and a footer with system information (27°C Cloudy, 22:36, ENG IN, 26-09-2024, PKE).

Create consumer Objects

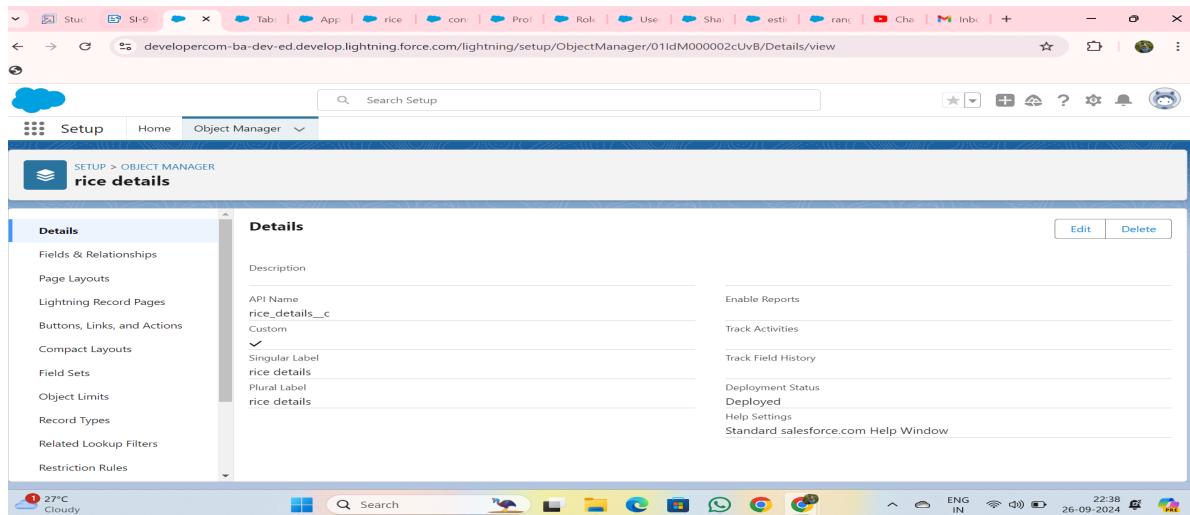
Note: Follow the same steps as mentioned in Activity 2 for the and Receipt objects.

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

The screenshot shows the Salesforce Object Manager interface. The URL in the browser is developercom-ba-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000002cUoj/Details/view. The page title is "SETUP > OBJECT MANAGER consumer". On the left, there's a sidebar with links like "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 content area has tabs for "Details" and "Fields & Relationships". Under "Details", there are sections for "Description", "API Name" (consumer_c), "Custom" (✓), "Singular Label" (consumer), "Plural Label" (consumers), "Enable Reports" (✓), "Track Activities" (✓), "Track Field History" (✓), "Deployment Status" (Deployed), and "Help Settings" (Standard salesforce.com Help Window). At the bottom, there are "Edit" and "Delete" buttons. The status bar at the bottom shows the weather (Cloudy, 27°C), system icons, and the date/time (26-09-2024, 22:37).

Create rice details Objects

1. Use these display format for the rice details
 - label name >> rice details
 - Plural label name >> rice details
 - Display Format >> rice-{000}
 - Starting Number >>1



TASK 2:

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

Types of Tabs:

Custom Tabs

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

Web Tabs

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

Visualforce Tabs

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

Lightning Component Tabs

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

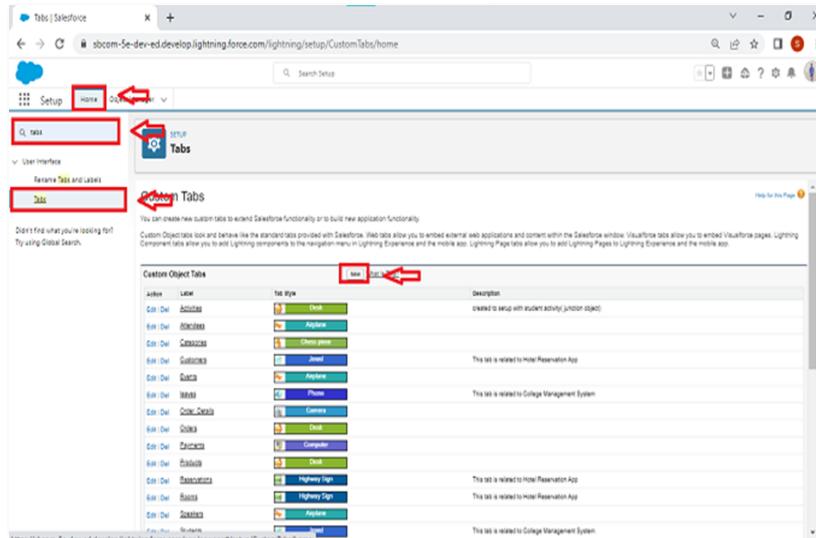
Lightning Page Tabs

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

Creating a Custom Tab

To create a Tab: (supplier)

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



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

The screenshot shows the 'Edit Custom Object Tab' page for the 'suppliers' object. The 'Tab Style' dropdown is set to 'Box', which is highlighted with a red box and a red arrow pointing to it. The page includes fields for 'Tab Label' (set to 'suppliers'), 'Object' (set to 'Supplier'), and a 'Description' text area.

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



Step 3. Add to Custom Apps

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App

| Platform (standard__Platform) | <input type="checkbox"/> Include Tab |
|---|--------------------------------------|
| Sales (standard__Sales) | <input type="checkbox"/> |
| Service (standard__Service) | <input type="checkbox"/> |
| Marketing (standard__Marketing) | <input type="checkbox"/> |
| Sample Console (standard__ServiceConsole) | <input type="checkbox"/> |
| High Volume Customer Portal User | <input type="checkbox"/> |
| Authenticated Website User | <input type="checkbox"/> |
| App Launcher (standard__AppLauncher) | <input type="checkbox"/> |

Step 3. Add to Custom Apps

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App

| Platform (standard__Platform) | <input type="checkbox"/> Include Tab |
|---|--------------------------------------|
| Sales (standard__Sales) | <input type="checkbox"/> |
| Service (standard__Service) | <input type="checkbox"/> |
| Marketing (standard__Marketing) | <input type="checkbox"/> |
| Sample Console (standard__ServiceConsole) | <input type="checkbox"/> |
| High Volume Customer Portal User | <input type="checkbox"/> |
| Authenticated Website User | <input type="checkbox"/> |
| App Launcher (standard__AppLauncher) | <input type="checkbox"/> |

Step 3. Add to Custom Apps

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App

| Analytics Studio (standard__Insights) | <input type="checkbox"/> |
|---|-------------------------------------|
| Sales Console (standard__LightningSalesConsole) | <input type="checkbox"/> |
| Service Console (standard__LightningService) | <input type="checkbox"/> |
| Sales (standard__LightningSales) | <input checked="" type="checkbox"/> |
| Lightning Usage App (standard__LightningInstrumentation) | <input type="checkbox"/> |
| Digital Experiences (standard__SalesforceCMS) | <input type="checkbox"/> |
| Queue Management (standard__QueueManagement) | <input type="checkbox"/> |
| Bot Solutions (standard__LightningBot) | <input type="checkbox"/> |
| Data Manager (standard__DataManager) | <input type="checkbox"/> |
| Salesforce Scheduler Setup (standard__LightningScheduler) | <input type="checkbox"/> |

Append tab to users' existing personal customizations

Previous **Save** **Cancel**

Creating Remaining Tabs

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

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

- Header:** Shows tabs for various setup sections like App, rice, con, Prof, Role, Use, Shai, esti, ran, Cha, and Inbc.
- Breadcrumbs:** developercom-ba-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home
- Page Header:** Includes a search bar labeled "Search Setup" and various navigation icons.
- Main Content:** The "Tabs" page under the "Setup" tab. It displays a table titled "Custom Object Tabs" with the following data:

| Action | Label | Tab Style | Description |
|------------|--------------|-----------|-------------|
| Edit Del | consumers | Presenter | |
| Edit Del | rice_details | Globe | |
| Edit Del | rice_mills | Factory | |
| Edit Del | supplier | Box | |

- Sub-sections:** Below the main table, there are sections for "Web Tabs" and "Visualforce Tabs", both of which currently show "No Web Tabs have been defined" and "No Visualforce Tabs have been defined".
- Footer:** Shows the Windows taskbar with various pinned apps like File Explorer, Mail, and Google Chrome, along with system status icons for battery, signal, and date/time (26-09-2024).

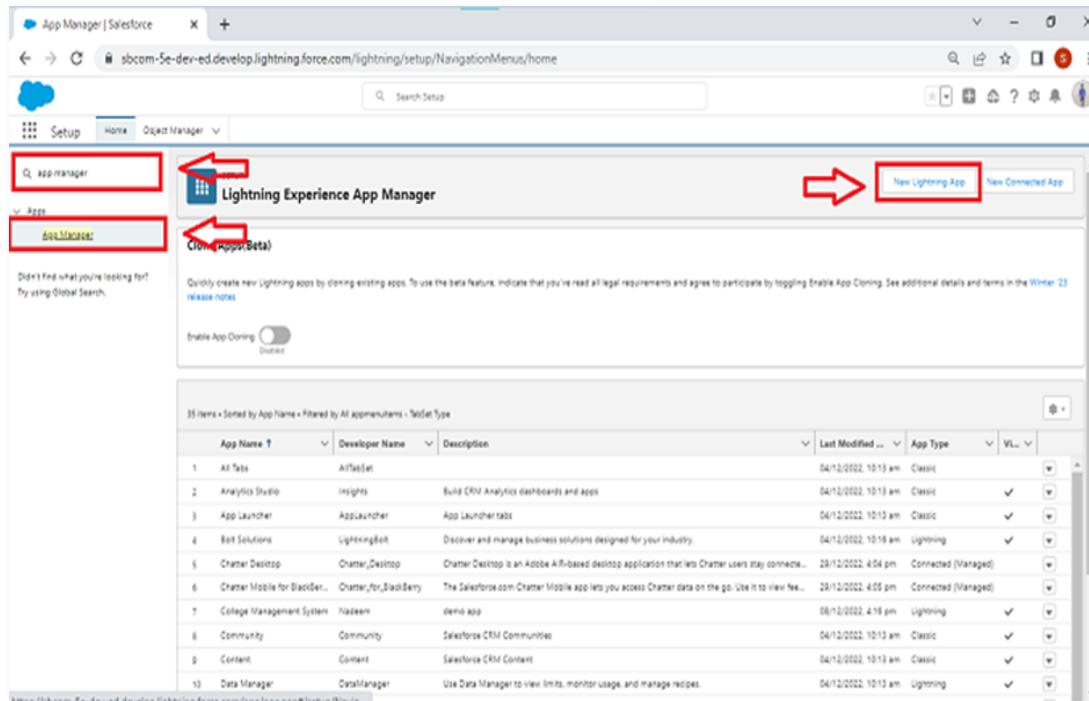
TASK 3 : The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

Create a Lightning App

To create a lightning app page:

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



The screenshot shows the Salesforce App Manager interface. At the top, there's a search bar with 'Search Setup'. Below it, a navigation bar has 'Setup' selected. A red box highlights the 'App Manager' link in the 'Apps' section of the navigation bar. Another red box highlights the 'Cloud Apps(Beta)' link below it. On the right side of the header, there's a 'New Lightning App' button with a red arrow pointing to it. The main content area displays a table of existing apps, with the first few rows shown below:

| App Name | Developer Name | Description | Last Modified | Type |
|-------------------------------|------------------------|--|----------------------|---------------------|
| AI Test | AItestSet | Build CRM Analytics dashboards and apps | 04/12/2022, 10:13 am | Classic |
| Analytics Studio | Insights | Build CRM Analytics dashboards and apps | 04/12/2022, 10:13 am | Classic |
| App Launcher | AppLauncher | App Launcher tabs | 04/12/2022, 10:13 am | Classic |
| BB Solutions | LightningBeta | Discover and manage business solutions designed for your industry. | 04/12/2022, 10:18 am | Lightning |
| Chatter Desktop | Chatter/Desktop | Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected... | 28/12/2022, 4:04 pm | Connected (Managed) |
| Chatter Mobile for BlackBerry | Chatter/for BlackBerry | The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view feed... | 28/12/2022, 4:05 pm | Connected (Managed) |
| College Management System | hadewi | demo app | 08/12/2022, 4:18 pm | Lightning |
| Community | Community | Salesforce CRM Communities | 04/12/2022, 10:13 am | Classic |
| Content | Content | Salesforce CRM Content | 04/12/2022, 10:13 am | Classic |
| Data Manager | DataManager | Use Data Manager to view limits, monitor usage, and manage recipes. | 04/12/2022, 10:13 am | Lightning |

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

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 →

* Developer Name

Description

App Branding

Image →

Primary Color Hex Value

Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next →

- 3.
4. Upload a photo that is related to your app.
5. To add Navigation Item:

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 Create →

→

- Accounts
- Activities
- Alert Settings
- All Sites →
- Alternative Payment Methods
- App Launcher
- Appointment Invitations

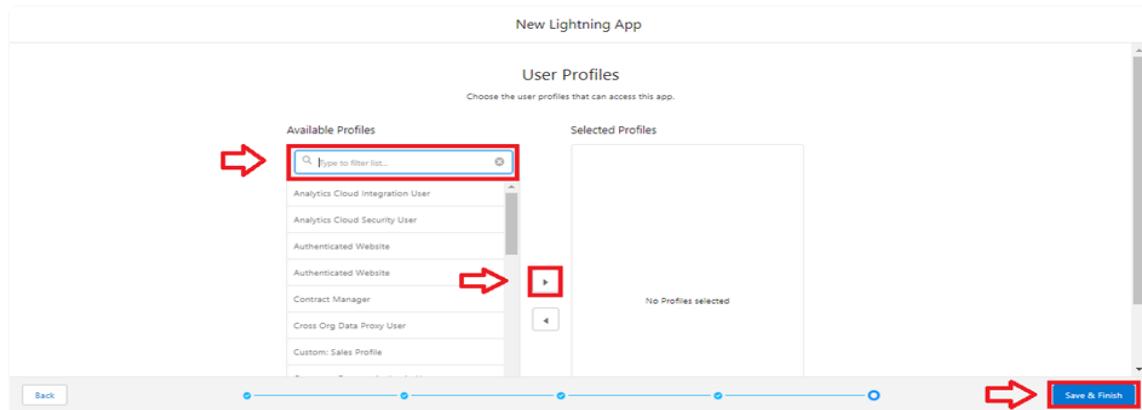
Selected Items

No items selected

Next →

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

To Add User Profiles:



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

| Field | Value |
|-------------------------|----------------|
| App Name | MY RICE1_clone |
| Developer Name | MY_RICE1_clone |
| Primary Color Hex Value | #0070D2 |

TASK 4 : Fields

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

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

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

1. Created By
2. Owner
3. Last Modified
4. Field Made During object Creation

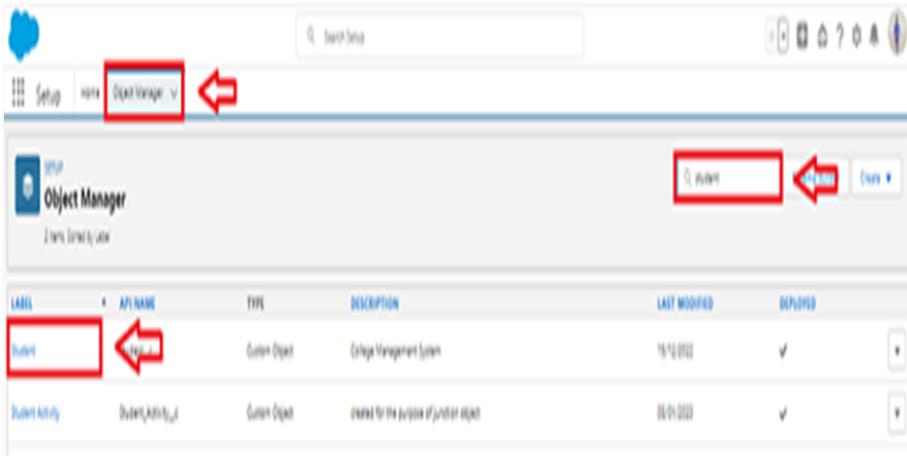
Custom Fields:

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

Creating the number field in rice details object

Creating the number field in rice details object

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



- Click on fields & relationship >> click on New.

| 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) | | ✓ |
| Sum of Fuel supplied | Sum__cFuel_supplied__c | Roll-Up Summary (SUM Fuel details) | | |
| Supplier Name | Name | Text(50) | | ✓ |

- Select Data type as "Number" and click Next.
- Given the Field Label as "rice distributed" and length as "5".

Step 2. Enter the details Step 2 of 4

Previous | **Next** | Cancel

| | |
|--|---|
| Field Label | <input type="text"/> |
| 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 | <input type="text" value="18"/> Number of digits to the left of the decimal point |
| Decimal Places | <input type="text" value="0"/> Number of digits to the right of the decimal point |
| Field Name | <input type="text"/> |
| Description | <input type="text"/> |
| Help Text | <input type="text"/> |

Always require a value in this field in order to save a record
 Do not allow duplicate values
 Set this field as the unique record identifier from an external system
 Use this field to store AI prediction scores
 Add this field to existing custom report types that contain this entity

- Field Name will be auto populated, and click on Next- Next >> Save.

| 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) | | ▼ |
| supplier name | supplier_names_c | Number(5, 0) | | ▼ |
| supplier Name | supplier_Name_c | Master-Detail(supplier) | | ✓ |

Creating Junction Object

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

Creating junction object as rice details with supplier & rice mill

To create junction object

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

2. Click on fields & relationships - click on New.

SETUP > OBJECT MANAGER

Supplier

Details

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) | | ▼ |
| Sum of Fuel supplied | Sum_of_Fuel_supplied__c | Roll-Up Summary (SUM Fuel details) | | ▼ |
| supplier Name | Name | Text(80) | | ▼ |

- Select “Master-Detail relationship” as data type and click Next.

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

Data Type

None Selected

Auto Number

Formula

Rollup Summary [?]

Lookup Relationship

Master-Detail Relationship

External Lookup 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.

- Select the related object “ supplier ” and click next.

Buyer

New Relationship

Step 2. Choose the related object

Select the other object to which this object is related

Related To: **Supplier**

Step 2 of 6

Previous Next Cancel

- Give Field Label as “supplier Name” and click Next.
- Next >> Next >> Save & New.
- Follow the same steps from 1 to 3.

8. Select the related object " rice mill " and click Next.
9. Give Field Label as "rice mill 1(one)" and click Next.
10. Next >> Next >> Save.

Creating a Master-Detail Relationship

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

Creating Master-Detail Relationship between consumer & rice mill Object

To Create a Master-Detail relationship

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

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

- URL:** developercom-ba-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000002cUgf/FieldsAndRelationships/view
- Page Header:** Search Setup, Setup, Home, Object Manager
- Section:** SETUP > OBJECT MANAGER
- Object:** rice mill
- Table:** Fields & Relationships (6 items, Sorted by Field Label)
- Table Headers:** FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, INDEXED
- Table Data:**

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------------------|-------------------|---------|
| Created By | CreatedById | Lookup(User) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User,Group) | ✓ | |
| rice mill name | Name | Auto Number | ✓ | |
| rice price/kg | rice_price_kg_c | Number(5, 0) | | |
| rice taken | rice_taken__c | Roll-Up Summary (SUM consumer) | | |
- Bottom Bar:** Cloudy, 27°C, Search, various icons (File, Home, App Launcher, etc.), ENG IN, 22:44, 26-09-2024

Creating the Roll-up Summary

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

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

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

The screenshot shows the Salesforce Object Manager interface. At the top, there is a search bar with the word 'student'. Below it, a table lists two objects: 'Student' and 'Student Activity'. The 'Student' object is highlighted with a red box around its 'API NAME' field ('Stdnt'). A red arrow points to this field. Another red arrow points to the 'student' entry in the search bar.

2. Now click on "Fields & Relationships" >> New

The screenshot shows the 'Fields & Relationships' page for the 'Student' object. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Record Types. The 'Fields & Relationships' section is selected and highlighted with a red box. On the right, a table lists existing fields such as 'Ad no.', 'Age', 'Created By', etc. A red box highlights the 'New' button at the top right of the table area. Another red arrow points to the 'Fields & Relationships' section in the sidebar.

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

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 pop-up 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.

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

seller
New Custom Field

Step 2. Enter the details Step 2 of 5

Previous Next Cancel

Field Label

Field Name

Description

Help Text

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

Previous Next Cancel

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

Step 3. Define the summary calculation Step 3 of 5

Previous Next Cancel

Select Object to Summarize

Master Object seller
Summarized Object

I = Required Information

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate

Filter Criteria

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

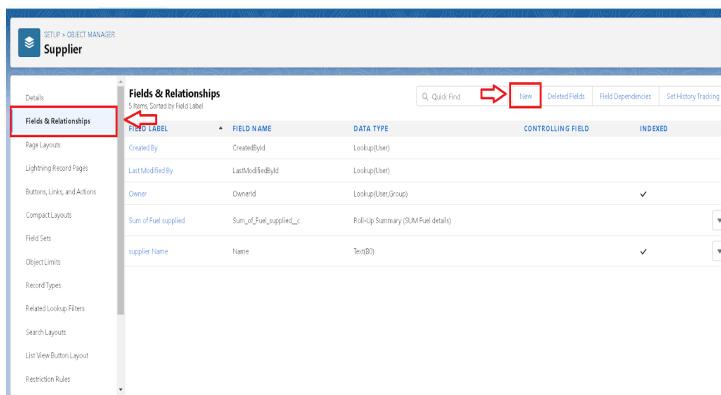
Previous Next Cancel

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

Creating Fields in Objects

Creating the number field in rice details object

1. Go to the setup page >> click on object manager >> From drop down click edit for rice details object.
2. Click on fields & relationship >> click on New.



3. Select Data type as “master detail” and click Next.
4. Given the Field Label as “ supplier name ” and length as “ 5

Step 2. Enter the details Step 2 of 4

Field Label 18

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 Number of digits to the left of the decimal point

Decimal Places Number of digits to the right of the decimal point

Field Name

Description

Help Text

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

Unique Do not allow duplicate values

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

AI Prediction Use this field to store AI prediction scores

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

Next Cancel

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

Creating Fields in rice mill Objects

1. Select Data type as “Number” and click Next.
2. Given the Field Label as “rice price/kg ” and length as “5 ”

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a cloud icon, a search bar labeled 'Search Setup', and various global buttons. The main header displays 'SETUP > OBJECT MANAGER' and the object name 'rice mill'. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main content area is titled 'Fields & Relationships' and shows a table of existing fields for the 'rice mill' object. A new field has been added to the table:

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

The status bar at the bottom indicates it's 83°F, Lightning nearby, and shows the date 27-09-2024.

Creating Fields in consumer Objects

The screenshot shows the Salesforce Setup page with the 'Object Manager' tab selected. Under the 'consumer' object, the 'Fields & Relationships' section is displayed. The table lists the following 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(15) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Last name | Last_name_c | Text(15) | | |

Creating Cross Object Formula Field in consumer Object

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

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

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

The dialog shows the following fields:

- Field Label:
- Field Name:
- Formula Return Type:
 - None Selected
 - Checkbox
 - Currency
 - Date
 - Date/Time
 - Number
 - Percent

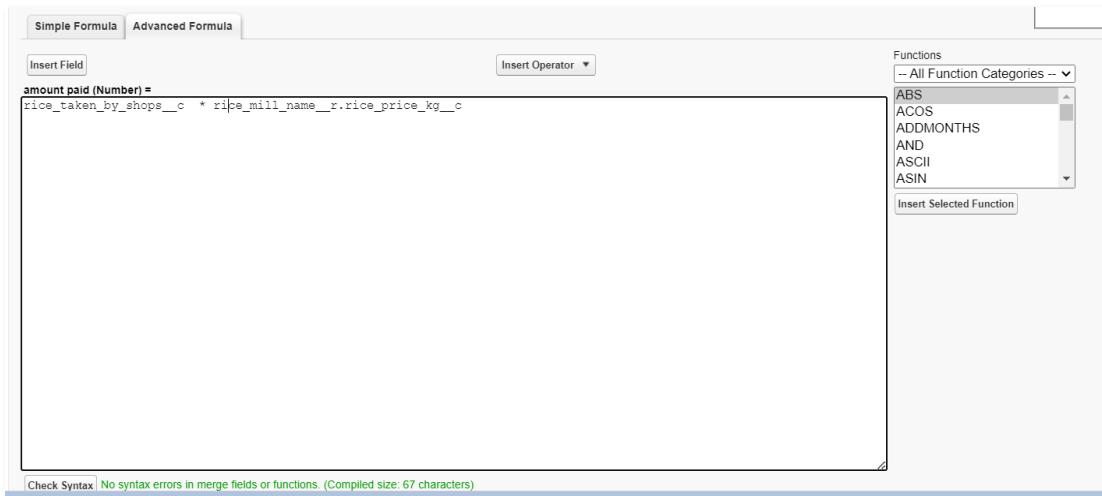
Below the radio buttons, there is a list of formula types with examples:

- Calculate a boolean value
Example: [TODAY()>CloseDate]
- Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: [Amount * 100]
- Calculate a date, for example, by adding or subtracting days to other dates.
Example: [Reminder Date = CloseDate - 7]
- Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: [CloseDate + 1]
- Calculate a numeric value
Example: [Fahrenheit = 1.8 * Celsius_c + 32]
- Calculate a percent and automatically add the percent sign to the number.
Example: [Discount = (Amount - Discounted_Amount_c) / Amount]

5. Insert fields formula should be :

rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c

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



1. Creating the Formula field in consumer Object

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

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

Creating the validation rule

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

Creating the validation rule for phone number field in consumer object

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

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

The screenshot shows the Salesforce Object Manager interface for the 'consumer' object. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main area is titled 'Validation Rules' and displays a single row of data:

| RULE NAME | ERROR LOCATION | ERROR MESSAGE | ACTIVE | MODIFIED BY |
|-------------------------------|----------------|--------------------------|--------|---|
| phononenumberoremailblankrule | Top of Page | please fill phone number | ✓ | udayrushi yelagandula, 05/07/2023, 12:57 pm |

3. Enter the Rule name as "Phonenumberoremailblankrule".
4. Enter the description as "phone number and email number should not be blank".
5. Enter the formula as "OR(ISBLANK(phone_number__c) , ISBLANK(email__c))" and check the syntax.

The screenshot shows the 'Validation Rule Edit' dialog box. At the top, it says 'The save will be aborted and the error message will be displayed. The user can correct the error and try again.' Below that are fields for 'Rule Name' (set to 'phononenumberoremailblankrule'), 'Active' (checkbox checked), and 'Description' (set to 'phone number and email should not be blank'). To the right, there is a 'Quick Tips' box with 'Operators & Functions' and a note that 'I = Required Information'. The bottom section is titled 'Error Condition Formula' and contains a text area with the formula 'OR(ISBLANK(phone_number__c) , ISBLANK(email__c))'. It includes a 'Check Syntax' button and a message 'No errors found'. A functions dropdown menu is open, showing options like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, and ABS(number). A tooltip for ABS(number) is visible, stating 'Returns the absolute value of a number, a number without its sign'.

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

TASK 5 : PAGE LAYOUT

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.

creating the page layout

To Create a Page layout:

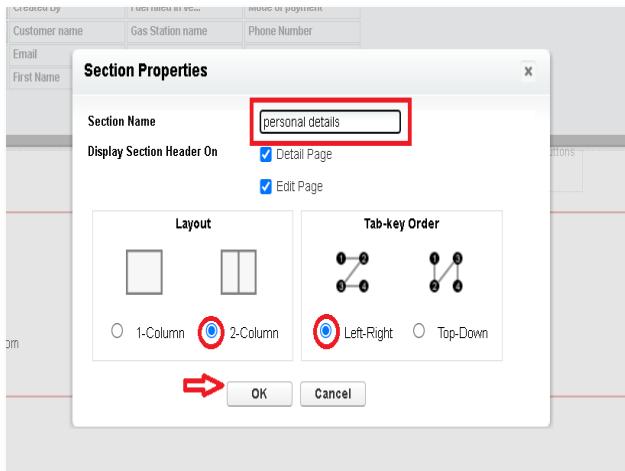
1. Go to Setup >> Click on Object Manager >>Search for the object (consumer) >> From drop down select the object and click on it.
2. Click on Page layout >> Click on New.

The screenshot shows the Salesforce Object Manager interface for the 'consumer' object. On the left, there's a sidebar with various tabs: Details, Fields & Relationships, Page Layouts (which is selected and highlighted in blue), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled 'Page Layouts' and shows two items: 'customer Layout' and 'personal details'. Each item has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. A 'Quick Find' search bar and a 'New' button are at the top right of the list.

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

The screenshot shows the 'Create New Page Layout' dialog box. It has a note at the top: '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.' Below this, there are two input fields: 'Existing Page Layout' (set to 'custom page') and 'Page Layout Name' (containing 'customer layout', which is highlighted with a red box). At the bottom are 'Save' and 'Cancel' buttons, with a red arrow pointing to the 'Save' button.

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



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

11. Then , Click SAVE.

| Section | Field | Value |
|-----------------|-----------------|----------------------------|
| rice details | rice mill name | rice taken by shops in kgs |
| rice details | Rice type | Sample Text |
| Receipt details | Mode of payment | Sample Text |
| Receipt details | Amount Paid | 16.39 |

TASK 6 : Profiles

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

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

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

We cannot deleted standard ones

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

2. Custom Profiles:

Custom ones defined by us.

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

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'Search Setup'. Below the navigation is a global search bar with the placeholder 'Didn't find what you're looking for? Try using Global Search.' On the left, a sidebar shows 'Users' and 'Profiles' under the 'Users' section. The main content area is titled 'Profiles' and displays a table of profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Custom' column contains a checked checkbox for the 'System Administrator' profile. Other profiles listed include 'Salesforce API Only System Integrations', 'Silver Partner User', 'Solution Manager', 'Standard Platform User', 'Standard User', and 'System Administrator'. At the bottom of the table, there are buttons for 'New Profile' and 'Edit | Delete | Create New View'. The bottom of the screen shows the Windows taskbar with various icons and system status information.

Owner Profile

To create a new profile:

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

The screenshot shows the 'Profiles' section in the Salesforce Setup. The 'owner' profile is selected. Key details include:

- Name: owner
- User License: Salesforce
- Description: (empty)
- Created By: udayrishi.yelagandula, 10/07/2023, 10:56 am
- Modified By: udayrishi.yelagandula, 10/07/2023, 10:56 am
- Custom Profile: checked

Under 'Page Layouts', the 'Standard Object Layouts' section lists various objects with their assigned layouts:

| Object | Layout | Description |
|----------------------------|--|---------------------|
| Global | Global Layout [View Assignment] | Object Milestone |
| Email Application | Not Assigned [View Assignment] | Operating Hours |
| Home Page Layout | DE Default [View Assignment] | Opportunity |
| Account | Account Layout [View Assignment] | Opportunity Product |
| Alternative Payment Method | Alternative Payment Method Layout [View Assignment] | Order |
| Appointment Invitation | Appointment Invitation Layout [View Assignment] | Order Product |

2.

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

The screenshot shows the 'Custom Object Permissions' section in the Salesforce Setup. It displays two tables of access rights for different objects:

| Object | Basic Access | | | | Data Administration | |
|----------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| | Read | Create | Edit | Delete | View All | Modify All |
| Assets | <input type="checkbox"/> |
| Asset Services | <input type="checkbox"/> |
| books | <input type="checkbox"/> |
| books | <input type="checkbox"/> |
| Brokers | <input type="checkbox"/> |
| consumers | <input checked="" type="checkbox"/> |
| Employees | <input type="checkbox"/> |
| energy audits | <input type="checkbox"/> |
| item details | <input type="checkbox"/> |
| nick names | <input type="checkbox"/> |
| positions | <input type="checkbox"/> |
| Projects | <input type="checkbox"/> |
| ProjectTasks | <input type="checkbox"/> |
| Properties | <input type="checkbox"/> |

| Object | Basic Access | | | | Data Administration | |
|-----------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| | Read | Create | Edit | Delete | View All | Modify All |
| purchasers | <input type="checkbox"/> |
| reviews | <input type="checkbox"/> |
| rice details | <input checked="" type="checkbox"/> |
| rice mills | <input checked="" type="checkbox"/> |
| SolarBots | <input type="checkbox"/> |
| SolarBot Status | <input type="checkbox"/> |
| stud | <input type="checkbox"/> |
| students | <input type="checkbox"/> |
| super marts | <input type="checkbox"/> |
| suppliers | <input checked="" type="checkbox"/> |
| teachers | <input type="checkbox"/> |
| tickets | <input type="checkbox"/> |
| vendors | <input type="checkbox"/> |

4.

5. Give access and save it.

employer Profile

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

The screenshot shows the Salesforce 'Profiles' page under the 'SETUP' tab. The left sidebar lists profiles: 'Assets', 'Asset Services', 'books', 'Brokers', 'consumers', 'Employees', 'energy audits', 'item details', 'nick names', 'positions', 'Projects', 'ProjectTasks', and 'Properties'. The right sidebar lists profiles: 'purchasers', 'reviews', 'rice details', 'rice mills', 'SolarBots', 'SolarBot Status', 'stud', 'students', 'super marts', 'suppliers', 'teachers', 'tickets', and 'vendors'. The main area displays two tables of object permissions:

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

5. And click save.

worker Profile

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

The screenshot shows the 'Profiles' page in the Salesforce Setup. It displays two tables of object permissions:

| Object | Basic Access | | | | | Data Administration | |
|----------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--|
| | Read | Create | Edit | Delete | View All | Modify All | |
| Assets | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Asset Services | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| books | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| books | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Brokers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| consumers | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Employees | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| energy audits | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| item details | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| nick names | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| positions | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Projects | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

| Object | Basic Access | | | | | Data Administration | |
|-----------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--|
| | Read | Create | Edit | Delete | View All | Modify All | |
| purchasers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| reviews | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| rice details | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| rice mills | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| SolarBots | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| SolarBot Status | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| stud | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| students | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| super marts | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| suppliers | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| teachers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| tickets | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

5. And click save.

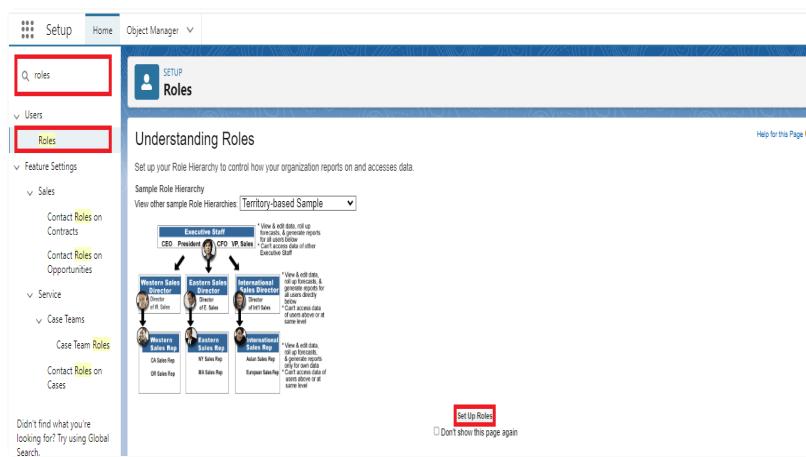
TASK 7 :Role & Role Hierarchy

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.

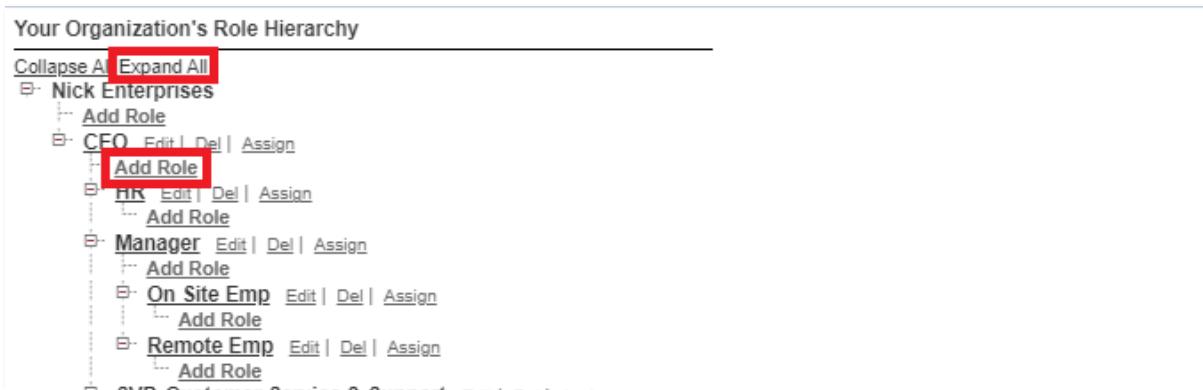
Creating owner Role

Creating owner Role:

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



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



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

Role Edit
New Role

Help for this Page [?](#)

Role Edit

| | |
|-----------------------------------|-------|
| Label | owner |
| Role Name | owner |
| This role reports to | CEO |
| Role Name as displayed on reports | |

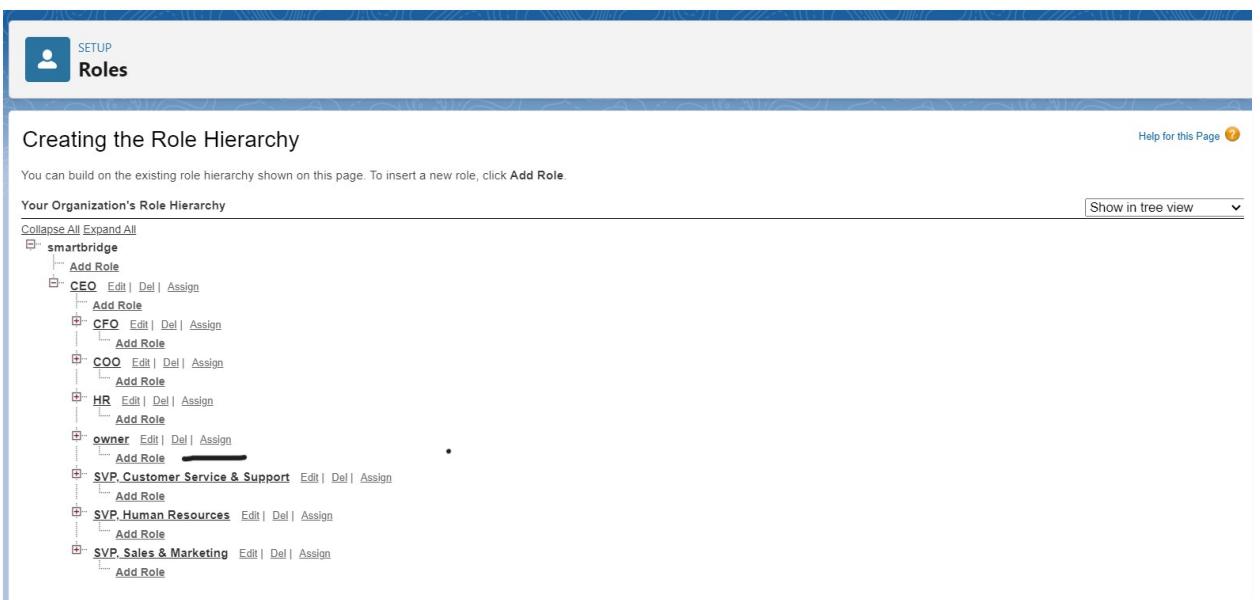
Save Save & New Cancel

1. Click and save it.

Creating employer roles

Creating another two roles under manager

1. Go to quick find >>Search for Roles >>click on set up roles.
2. Click plus on CEO role, and click add role under owner.



4. Give Label as "employer" and Role name gets auto populated. Then click on Save.
5. Repeat the same steps, for another role.

6. Click plus on CEO role, and click plus on owner, and click add role under employer.

The screenshot shows the Salesforce Setup Roles page. The sidebar on the left lists categories like Users, Feature Settings, Sales, Service, and Case Teams. The main content area displays a hierarchical list of roles:

- Manager**: Edit | Del | Assign, Add Role
- On Site Employee**: Edit | Del | Assign, Add Role
- Remote Employee**: 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
- Customer Support International**: Edit | Del | Assign, Add Role
- Customer Support North America**: Edit | Del | Assign, Add Role
- Installation & Repair Services**: Edit | Del | Assign, Add Role
- SVP.Human Resources**: Edit | Del | Assign, Add Role
- SVP.Sales & Marketing**: Edit | Del | Assign, Add Role
- VP.International Sales**: Edit | Del | Assign, Add Role
- VP.Marketing**: Edit | Del | Assign, Add Role

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

The screenshot shows the Salesforce Setup Roles page. The sidebar on the left is similar to the previous one, with the 'Roles' option selected. The main content area shows the 'LENDI INSTITUTE OF ENGINEERING AND TECHNOLOGY' organization. Under the 'owner' role, a new 'worker' role has been added, which is highlighted in yellow. The 'worker' role has an 'Add Role' button next to it. The status bar at the bottom indicates it's 27°C Cloudy, the date is 26-09-2024, and the time is 22:51.

TASK 8 : 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.

Create User

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

The screenshot shows the 'User Edit' page in the Salesforce setup interface. The title bar says 'SETUP' and 'Users'. The page header includes 'User Edit' and the name 'vicky y'. On the right, there's a 'Help for this Page' link. The main area is titled 'User Edit' and contains a 'General Information' section. It has two columns of input fields. The left column includes: First Name (vicky), Last Name (y), Alias (vy), Email (ramesh0820@gmail.com), Username (ramesh0820@754123gmail), Nickname (vicky), Title (empty), Company (empty), Department (empty), and Division (empty). The right column includes: Role (owner), User License (Salesforce), Profile (owner), Active (checked), Marketing User (unchecked), Offline User (unchecked), Knowledge User (unchecked), Flow User (unchecked), Service Cloud User (unchecked), Site.com Contributor User (unchecked), Site.com Publisher User (unchecked), WDC User (unchecked), Data.com User Type (None selected), and Data.com Monthly Addition Limit (300). A note at the top right indicates that red fields are required information.

12. Save it.

creating another users

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

Create Another User

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

| Action | Full Name | Alias | Username | Role | Active | Profile |
|--------------------------|---|---------|--|----------------------------------|-------------------------------------|----------------------------------|
| <input type="checkbox"/> | Chatter_Expert | Chatter | chatty.00ddm00000cy4txuat.0-the0ah8pysz@chatter.salesforce.com | worker | <input checked="" type="checkbox"/> | Chatter Free User |
| <input type="checkbox"/> | raj..raju | raj | raj@outlook.com | employee | <input checked="" type="checkbox"/> | Standard Platform User |
| <input type="checkbox"/> | ram..ram | ram | ram@outlook.com | employee | <input checked="" type="checkbox"/> | Standard Platform User |
| <input type="checkbox"/> | Santhosh_Kartheek..Sunkarapalli_Venkata | SSant | kartheesk@developer.com | System Administrator | <input checked="" type="checkbox"/> | System Administrator |
| <input type="checkbox"/> | User_Integration | integ | integration@00ddm00000cy4txuat.com | Analytics_Cloud_Integration_User | <input checked="" type="checkbox"/> | Analytics_Cloud_Integration_User |
| <input type="checkbox"/> | User_Security | sec | insightssecurity@00ddm00000cy4txuat.com | Analytics_Cloud_Security_User | <input checked="" type="checkbox"/> | Analytics_Cloud_Security_User |
| <input type="checkbox"/> | y_vicky | vv | vickyv@outlook.com | owner | <input checked="" type="checkbox"/> | owner |

TASK 9 : 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.

Creating OWD setting.

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

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup interface. The left sidebar has a search bar and a 'Security' section with links for 'Guest User Sharing Rule Access Report' and 'Sharing Settings'. The 'Sharing Settings' link is highlighted with a red box. The main content area is titled 'Sharing Settings' and contains a table for 'Default Sharing Settings'. The table has columns for 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. An 'Edit' button is located at the top right of the table, also highlighted with a red box. The table rows include Lead, Account and Contract, Contact, Order, and Asset, each with specific sharing rules defined.

2. Scroll down, change the default internal access to " public read-only" for rice mill and supplier object.
3. Click save.
4. Extra information, By these every profile has their own access, according to their profile.
5. But in our case we created roles and given the roles in such a way that the owner can see employer and worker records , and the employer can see the worker records.

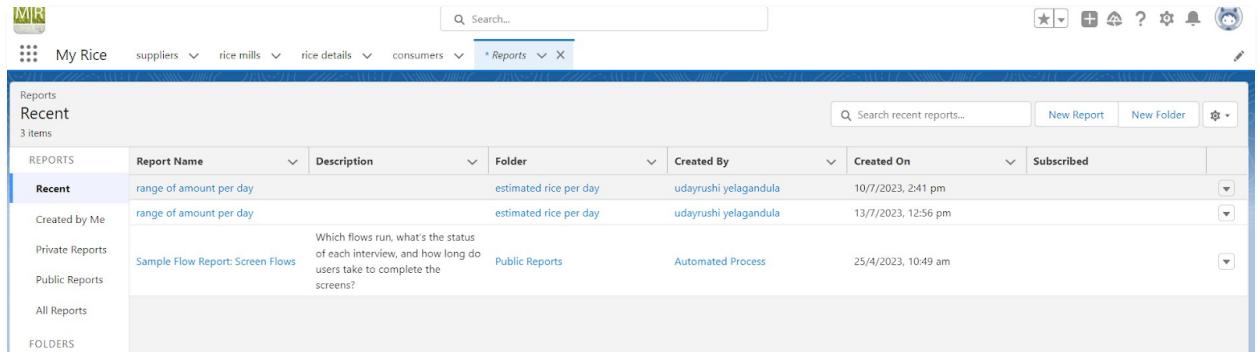
The screenshot shows a detailed view of the 'Sharing Settings' page in the Salesforce Setup interface. The left sidebar has a search bar and a 'Security' section with links for 'Guest User Sharing Rule Access Report' and 'Sharing Settings'. The 'Sharing Settings' link is highlighted with a red box. The main content area is titled 'Sharing Settings' and contains a table for 'Tableau Host Mapping' with two columns of sharing rules. The first column lists objects like Tableau Host Mapping, Walllist, Web Cart Document, Work Plan, Work Order, Work Plan Template, Work Step Template, Work Type, Work Type Group, rice mill, and supplier. The second column lists sharing levels: Public Read Only, Private, or Public Read/Write. The 'Edit' button is located at the top right of the table, highlighted with a red box. At the bottom of the page, there are sections for 'Other Settings' and checkboxes for 'Standard Report Visibility', 'Manual User Record Sharing', 'Manager Groups', 'Secure guest user record access', and 'Require permission to view record names in lookup fields'.

TASK 10 :

Create Report

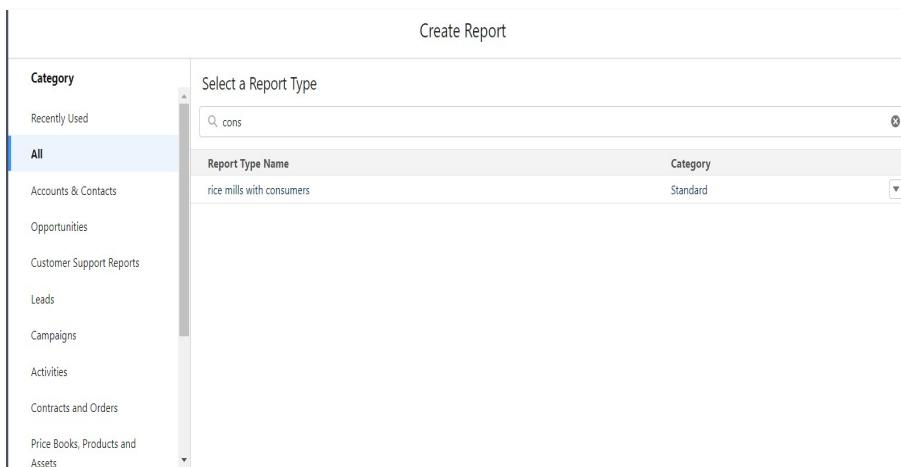
Note : Before creating a report, create the latest “10” records in consumer objects.
Try to fill every field in each record for better experience.

1. Go to the app >>click on the reports tab
2. Click New Report.



The screenshot shows the 'Reports' section of a CRM application. The left sidebar has sections for 'Recent' (3 items), 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', and 'FOLDERS'. The main area displays a table of recent reports with columns: REPORTS, Report Name, Description, Folder, Created By, Created On, and Subscribed. One report is highlighted: 'range of amount per day' (estimated rice per day) created by 'udayrushi.yelagandula' on '10/7/2023, 2:41 pm'. Another report, 'range of amount per day', is also listed. A third report, 'Sample Flow Report: Screen Flows', is described as 'Which flows run, what's the status of each interview, and how long do users take to complete the screens?' and is categorized under 'Public Reports'.

3. select for report type, search for “rice mill with consumers” click on it. And click on start report.



The screenshot shows the 'Create Report' dialog. On the left is an outline pane with categories like 'Recently Used', 'All' (Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, Price Books, Products and Assets), and 'Select a Report Type'. The right pane shows a search bar with 'cons' typed in, a table header 'Report Type Name' and 'Category', and one result: 'rice mills with consumers' under 'Standard' category.

1. Their outline pane is opened already, select the fields that are mentioned below in the column section.
 - 1.consumer name
 - 2.rice type
 - 3.rice price/kg
 - 4.mode of payments
 - 5.amount paid

2. Remove the unnecessary fields.
3. Select the fields that are mentioned below in the GROUP ROWS section.
 1. Rice taken by shops

My Rice suppliers rice mills rice details consumers * Reports X

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

Fields > **Outline** ▾ Filters **i** Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

| rice taken by shops ↑ | consumer: consumer name ↓ | rice type ↓ | rice price/kg ↓ | mode of payments ↓ | amount paid ↓ |
|-----------------------|---------------------------|-------------|-----------------|--------------------|---------------|
| 8 (1) | A-0003 | normal rice | 50 | Cash | 400.00 |
| | | | 50 | | 400.00 |
| Subtotal | | | | | |
| 10 (1) | A-0006 | basmati | 50 | Cash | 500.00 |
| | | | 50 | | 500.00 |
| Subtotal | | | | | |
| 12 (1) | A-0007 | basmati | 50 | Cash | 600.00 |
| | | | 50 | | 600.00 |
| Subtotal | | | | | |
| 15 (1) | A-0008 | basmati | 50 | Cash | 750.00 |
| | | | 50 | | 750.00 |
| Subtotal | | | | | |
| 16 (1) | A-0010 | normal rice | 50 | Cash | 800.00 |
| | | | 50 | | 800.00 |
| Subtotal | | | | | |
| 18 (1) | A-0009 | normal rice | 50 | Cash | 900.00 |
| | | | 50 | | 900.00 |
| Subtotal | | | | | |
| 80 (1) | A-0011 | basmati | 50 | Net banking | 4,000.00 |
| | | | 50 | | 4,000.00 |
| Subtotal | | | | | |
| Total (11) | | | 50 | | 9,050.00 |

Row Counts Detail Rows Subtotals Grand Total

Conditional For

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

Report: rice mills with consumers
range of amount per day

Total Records Total rice price/kg Total amount paid
11 50 9,050.00

| rice taken by shops ↑ | consumer: consumer name ↓ | rice type ↓ | rice price/kg ↓ | mode of payments ↓ | amount paid ↓ |
|-----------------------|---------------------------|-------------|-----------------|--------------------|---------------|
| 5 (2) | A-0001 | basmati | 50 | Net banking | 250.00 |
| | A-0005 | normal rice | 50 | Cash | 250.00 |
| Subtotal | | | 50 | | 500.00 |
| 6 (2) | A-0002 | normal rice | 50 | Cash | 300.00 |
| | A-0004 | basmati | 50 | Cash | 300.00 |
| Subtotal | | | 50 | | 600.00 |
| 8 (1) | A-0003 | normal rice | 50 | Cash | 400.00 |
| Subtotal | | | 50 | | 400.00 |
| 10 (1) | A-0006 | basmati | 50 | Cash | 500.00 |
| Subtotal | | | 50 | | 500.00 |
| 12 (1) | A-0007 | basmati | 50 | Cash | 600.00 |
| Subtotal | | | 50 | | 600.00 |
| 15 (1) | A-0008 | basmati | 50 | Cash | 750.00 |

Row Counts Detail Rows Subtotals Grand Total

Screenshot of a Salesforce Lightning interface showing consumer records and a report.

Consumer List View:

- URL: developercom-ba-dev-ed.lightning.force.com/lightning/o/consumer_c/list?filterName=_Recent
- Header: MY RICE, supplier, rice mills, consumers, rice details
- Section: consumers, Recently Viewed
- Table:

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

Report View:

- URL: developercom-ba-dev-ed.lightning.force.com/lightning/r/Report/00OdM0000077oLpUAI/view?queryScope=userFolders
- Header: MY RICE, supplier, rice mills, consumers, rice details
- Section: Report: rice mills with consumers
- Section: range of amount per day
- Table:

| Total Records | Total rice price/kg | Total Amount Paid | | | |
|----------------------------|-------------------------|-------------------|---------------|-----------------|-------------|
| 8 | 24 | 936.00 | | | |
| Rice taken by shops | | | | | |
| | consumer: consumer Name | Rice type | rice price/kg | Mode of payment | Amount Paid |
| 2 (1) | consumers-001 | 1.basmati | 11 | Net banking | 22.00 |
| Subtotal | | | 11 | | 22.00 |
| 3 (1) | consumers-002 | 2.normal rice | 13 | Debit card | 39.00 |
| Subtotal | | | 13 | | 39.00 |
| 11 (1) | consumers-006 | 1.basmati | 13 | Net banking | 143.00 |
| Subtotal | | | 13 | | 143.00 |
| 12 (5) | consumers-004 | 2.normal rice | 13 | Credit card | 156.00 |
| | consumers-003 | 1.basmati | 11 | Cash | 132.00 |
| | consumers-005 | 1.basmati | 13 | Debit card | 156.00 |
| | consumers-007 | 2.normal rice | 11 | UPI | 132.00 |
| | consumers-008 | 1.basmati | 13 | Debit card | 156.00 |

Sharing report to owner

1. Click edit drop down and select subscribe option

The screenshot shows a reporting interface titled "Report: rice mills with consumers range of amount per day". The table lists various transactions with columns for consumer name, rice type, price/kg, mode of payment, and amount paid. A context menu is open on the right, with "Subscribe" highlighted.

| rice taken by shops | consumer: consumer name | rice type | rice price/kg | mode of payments | amount paid |
|---------------------|-------------------------|-------------|---------------|------------------|-------------|
| 8 (1) | A-0003 | normal rice | 50 | Cash | 400.00 |
| Subtotal | | | 50 | | 400.00 |
| 10 (1) | A-0006 | basmati | 50 | Cash | 500.00 |
| Subtotal | | | 50 | | 500.00 |
| 12 (1) | A-0007 | basmati | 50 | Cash | 600.00 |
| Subtotal | | | 50 | | 600.00 |
| 15 (1) | A-0008 | basmati | 50 | Cash | 750.00 |
| Subtotal | | | 50 | | 750.00 |
| 16 (1) | A-0010 | normal rice | 50 | Cash | 800.00 |
| Subtotal | | | 50 | | 800.00 |
| 18 (1) | A-0009 | normal rice | 50 | Cash | 900.00 |
| Subtotal | | | 50 | | 900.00 |
| 80 (1) | A-0011 | basmati | 50 | Net banking | 4,000.00 |
| Subtotal | | | 50 | | 4,000.00 |
| Total (11) | | | 50 | | 9,050.00 |

2. Follow as per below image.

The screenshot shows the "Edit Subscription" dialog box. It includes sections for "Settings" (Frequency: Daily, Weekly, Monthly), "Time" (8:00 am), "Attachment" (Attach File), "Recipients" (Send email to Me, Edit Recipients), and "Run Report As" (Me, Another Person). At the bottom are "Cancel" and "Save" buttons.

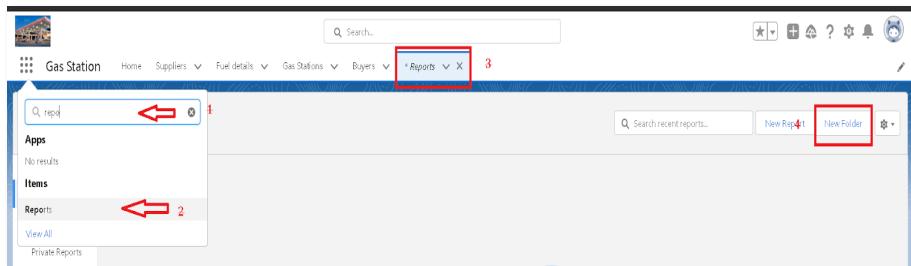
3.

- After selecting the run report as a “another person” select your personal account or whom you want to send that mail to.
- Click save.

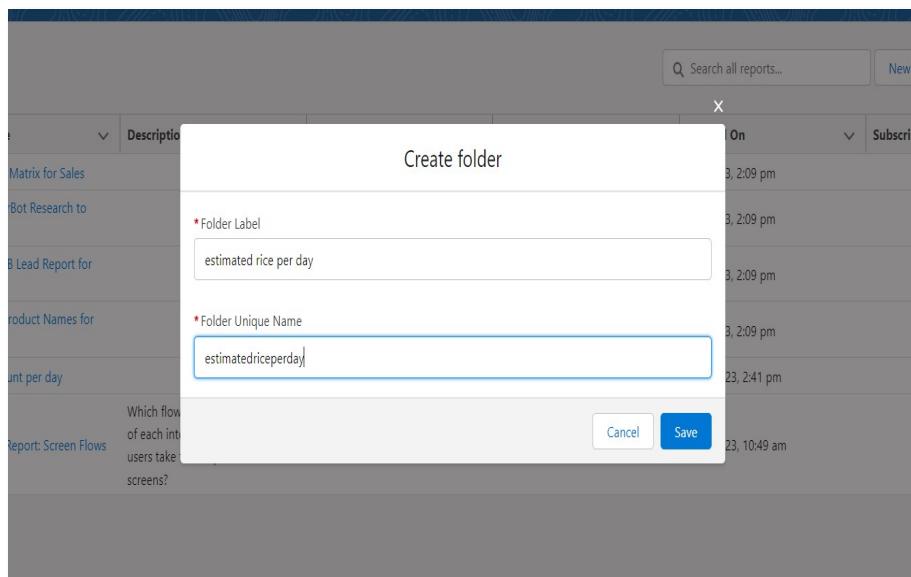
NOTE: The owner gets daily email notification of that rice mill report so that he can see all data remotely.

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.



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

The screenshot shows the Salesforce Reports interface. The left sidebar lists categories: REPORTS, FOLDERS, and FAVORITES. Under REPORTS, 'All Reports' is selected. A list of reports is displayed with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. One report, 'range of amount per day', is highlighted. A context menu is open over this report, containing the following options: Run, Edit, Subscribe, Export, Delete, Add to Dashboard, Favorite, and Move.

| REPORTS | Report Name | Description | Folder | Created By | Created On | Subscribed |
|-----------------|---------------------------------------|---|---------------------|-----------------------|--------------------|------------|
| Recent | Erin's SB Opp Matrix for Sales | | Acquisition Reports | udayrushi yelagandula | 5/6/2023, 2:09 pm | |
| Created by Me | Lincoln's SolarBot Research to remove | | Acquisition Reports | udayrushi yelagandula | 5/6/2023, 2:09 pm | |
| Private Reports | Marketing's SB Lead Report for Sales | | Acquisition Reports | udayrushi yelagandula | 5/6/2023, 2:09 pm | |
| Public Reports | Potential SB Product Names for R&D | | Acquisition Reports | udayrushi yelagandula | 5/6/2023, 2:09 pm | |
| All Reports | range of amount per day | Which flows run, what's the status of each interview, and how long do users take to complete the screens? | Private Reports | udayrushi yelagandula | 10/7/2023, 2:41 pm | |

5. Select estimated rice per day folder and select folder.

The screenshot shows a modal dialog titled 'Move range of amount per day'. The dialog contains a tree view of 'All Folders'. The root node 'All Folders' has several children: 'Acquisition Reports', 'Einstein Bot Reports', 'Einstein Bot Reports Summer '23', 'Einstein Bot Reports Summer '22', 'Einstein Bot Reports Winter '23', and 'Report Recycle Bin'. One folder, 'estimated rice per day', is selected and highlighted. At the bottom of the dialog are buttons for 'New Folder', 'Cancel', and 'Select'.

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.

The screenshot shows a software application interface for managing reports and folders. At the top, there is a navigation bar with a search bar, a filter for 'range of amount per day', and various user and system icons. The main area is titled 'Reports' and shows a list of items under 'All Folders'. The table has columns for Name, Created By, Created On, Last Modified By, and Last Modified Date. The data includes several reports from 'Einstein Bot Reports' and dashboards from 'Enablement Dashboard Reports'. A specific folder named 'estimated rice per day' is listed under 'Favorites'. The sidebar on the left provides quick access to different sections like Reports, Folders, and Favorites. The bottom of the screen shows a taskbar with weather information (27°C, Cloudy), a search bar, and various system icons.

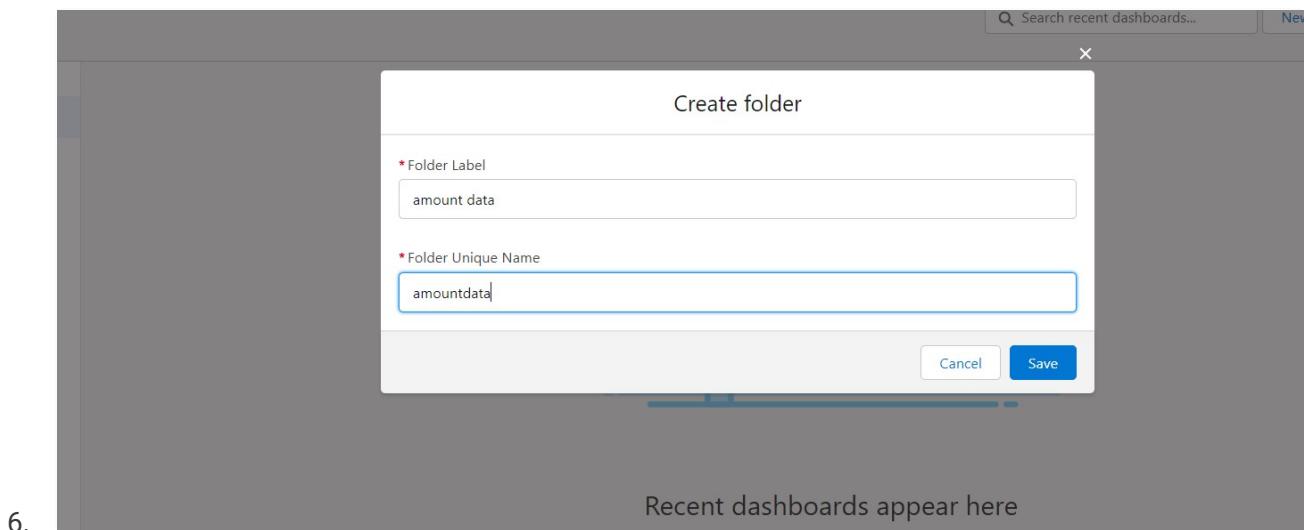
| | Name | Created By | Created On | Last Modified By | Last Modified Date |
|-----------------|---|--|--------------------|--|--------------------|
| Recent | Einstein Bot Reports | Automated Process | 24/9/2024, 7:08 pm | Automated Process | 24/9/2024, 7:08 pm |
| Created by Me | Einstein Bot Reports Spring '23 | Automated Process | 24/9/2024, 7:08 pm | Automated Process | 24/9/2024, 7:08 pm |
| Private Reports | Einstein Bot Reports Summer '23 | Automated Process | 24/9/2024, 7:08 pm | Automated Process | 24/9/2024, 7:08 pm |
| Public Reports | Einstein Bot Reports Summer '22 | Automated Process | 24/9/2024, 7:08 pm | Automated Process | 24/9/2024, 7:08 pm |
| All Reports | Einstein Bot Reports Winter '23 | Automated Process | 24/9/2024, 7:08 pm | Automated Process | 24/9/2024, 7:08 pm |
| FOLDERS | Enablement Dashboard Reports Spring '24 | Automated Process | 24/9/2024, 7:08 pm | Automated Process | 24/9/2024, 7:08 pm |
| All Folders | Enablement Dashboard Reports Summer '24 | Automated Process | 24/9/2024, 7:08 pm | Automated Process | 24/9/2024, 7:08 pm |
| Created by Me | estimated rice per day | Sunkarapalli Venkata Santhosh Kartheek | 25/9/2024, 7:24 pm | Sunkarapalli Venkata Santhosh Kartheek | 25/9/2024, 7:24 pm |
| Shared with Me | | | | | |
| FAVORITES | | | | | |
| All Favorites | | | | | |

TASK 11 :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.

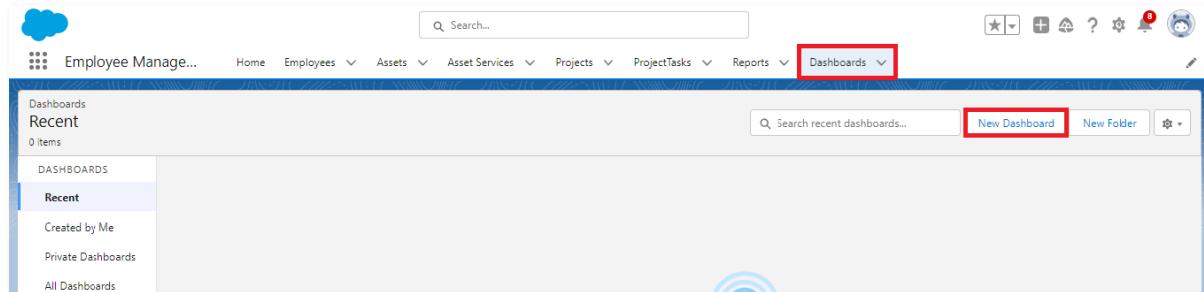
Create Dashboard Folder

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

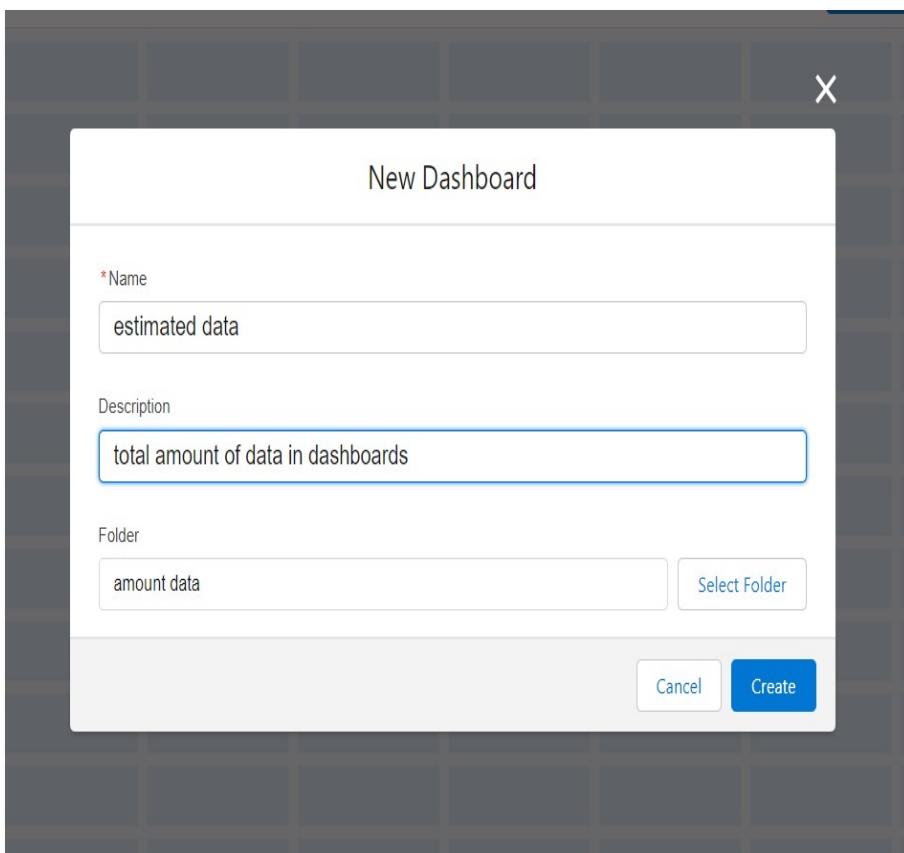


Create Dashboard

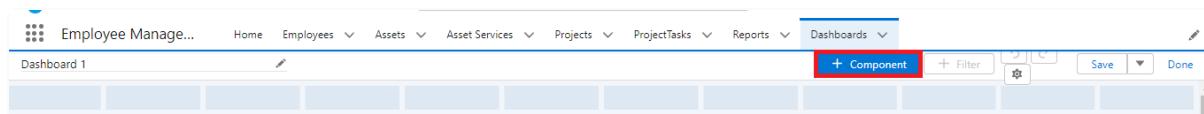
1. Go to the app >> click on the Dashboards tabs.



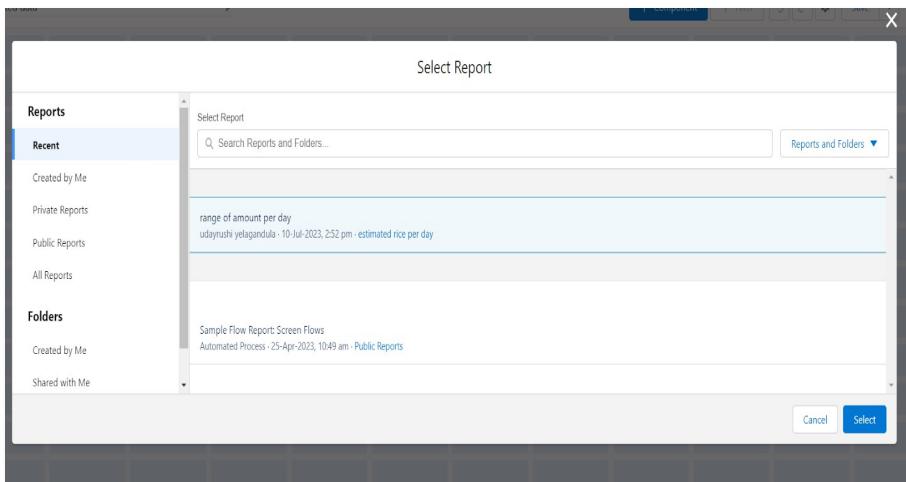
2. Give a Name and select the folder that was created, and click on create.



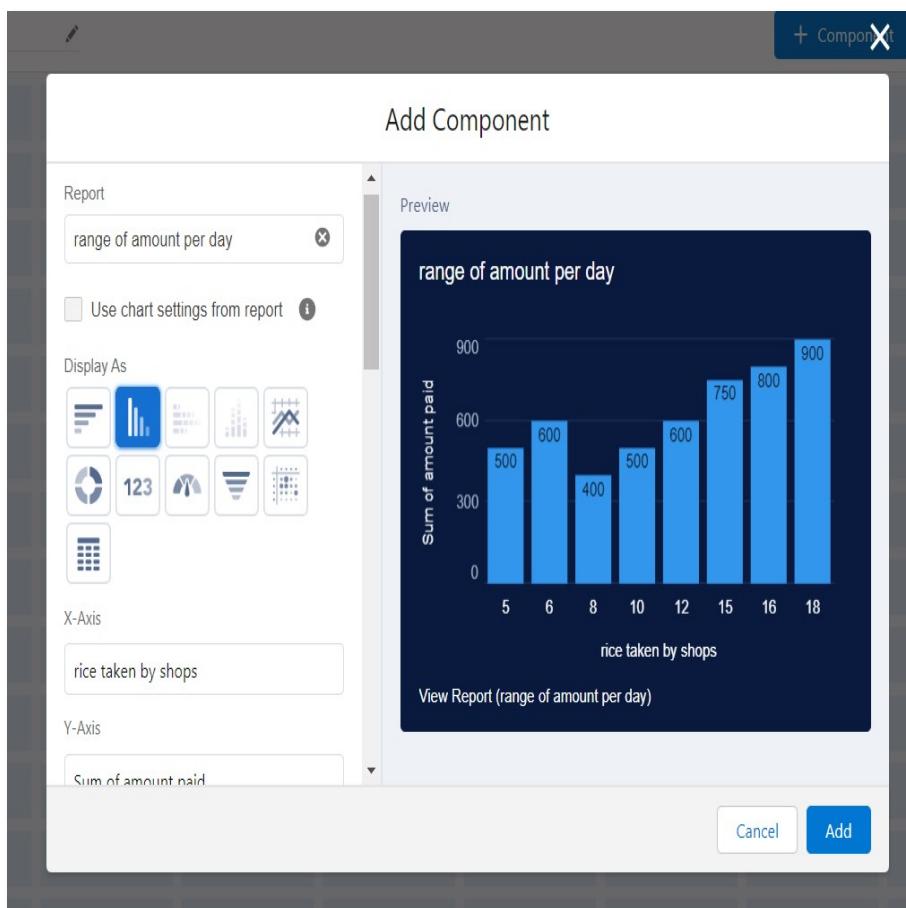
1. Select add component.



1. Select a Report and click on select.



1. Preview is shown below.



Display as>> vertical bar chart

X-axis >> rice taken by shops

Y-axis >> sum of amount

Y-axis range >> automatic

Sort by >> rice taken by shops

Component theme >> dark.

Add the component

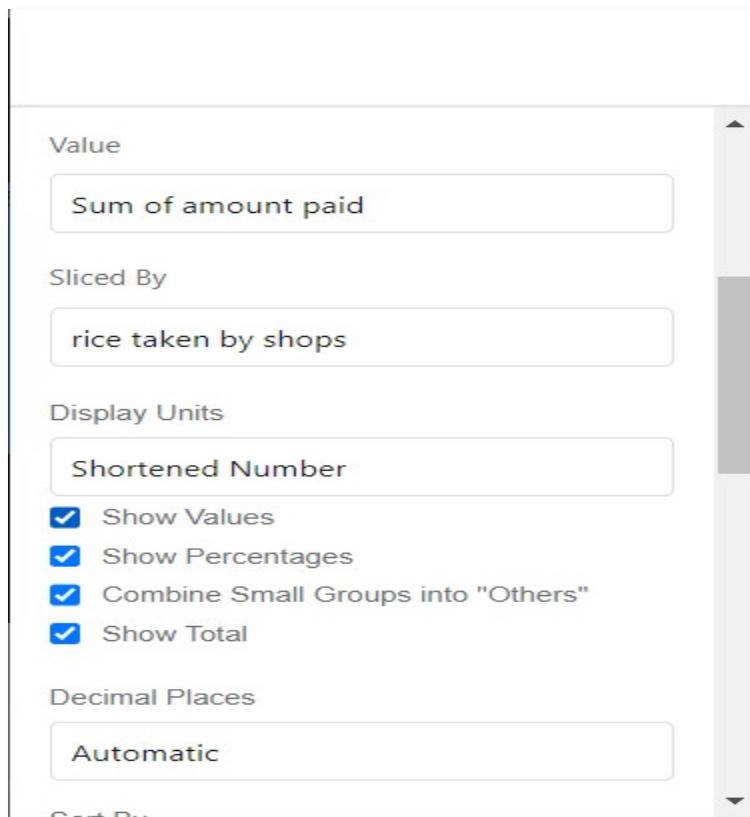
Again select add component with above same steps

1.display as donut chart

2.sort by >> sum of amount

3.title>>range of amount per day

4.component theme dark



Click add.

Click save and done.

Add Component

Report

range of amount per day X

Use chart settings from report i

Display As



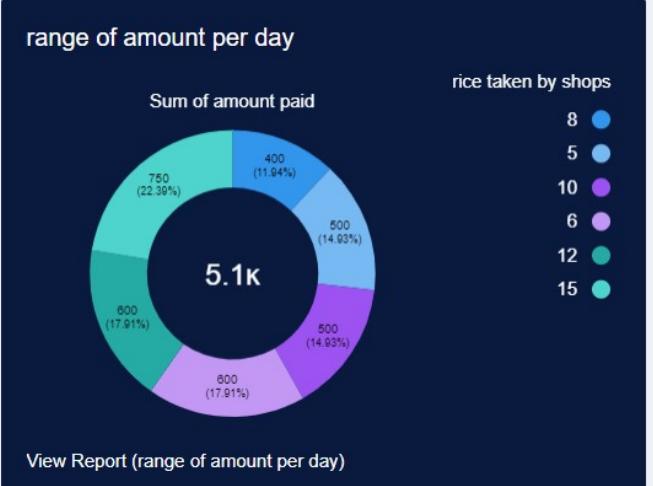
Value

Sum of amount paid

Sliced By

Preview

range of amount per day



Sum of amount paid

rice taken by shops

| Shop Number | Count |
|-------------|-------|
| 8 | 1 |
| 5 | 1 |
| 10 | 1 |
| 6 | 1 |
| 12 | 1 |
| 15 | 1 |

View Report (range of amount per day)

Cancel
Add

developercom-ba-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru

MY RICE

supplier ▾ rice mills ▾ consumers ▾ rice details ▾ * range of amount per day ▾ * Dashboards ▾ X

Search...

Recent

1 item

| DASHBOARDS | Dashboard Name | Description | Folder | Created By | Created On | Subscribed |
|------------|----------------|------------------------------------|-----------------------|---|--------------------|---|
| Recent | estimated data | total amount of data in dashboards | amount data dashboard | Sunkarapalli Venkata Santhosh Kartheek | 25/9/2024, 7:29 pm | |

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

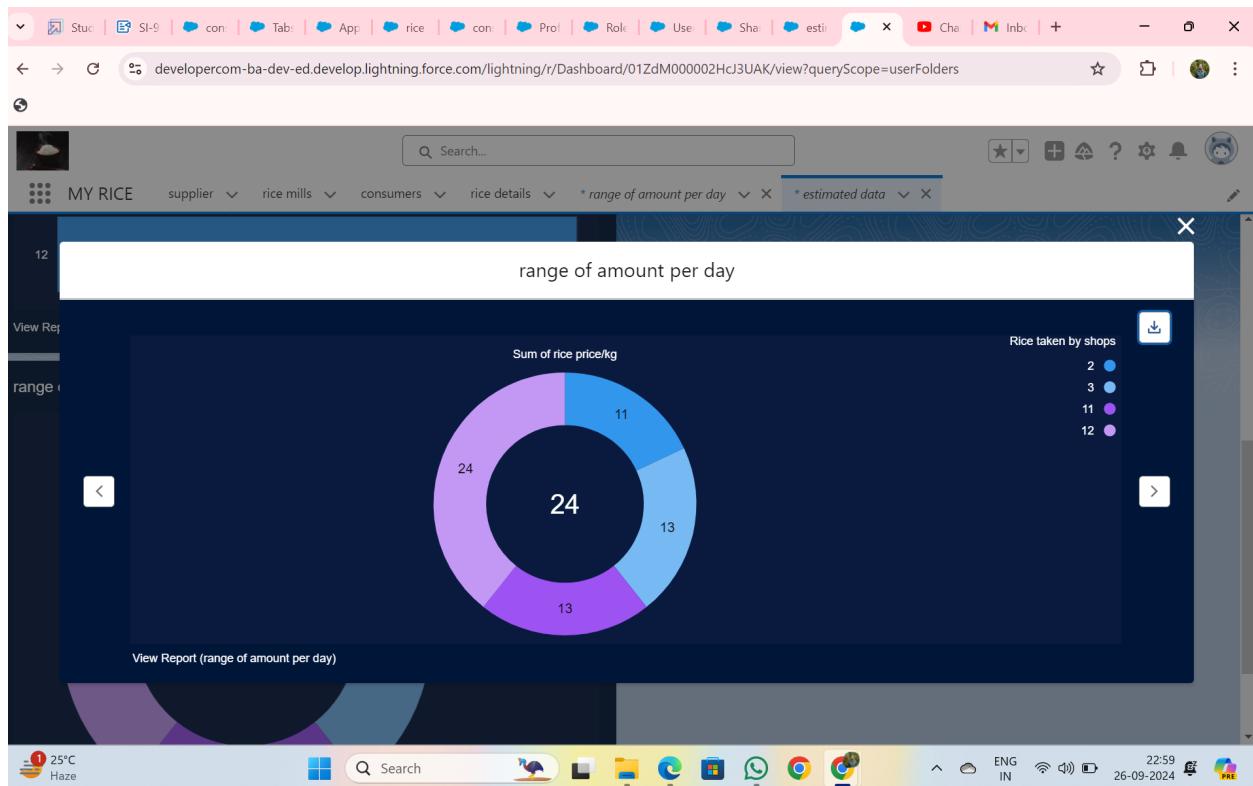
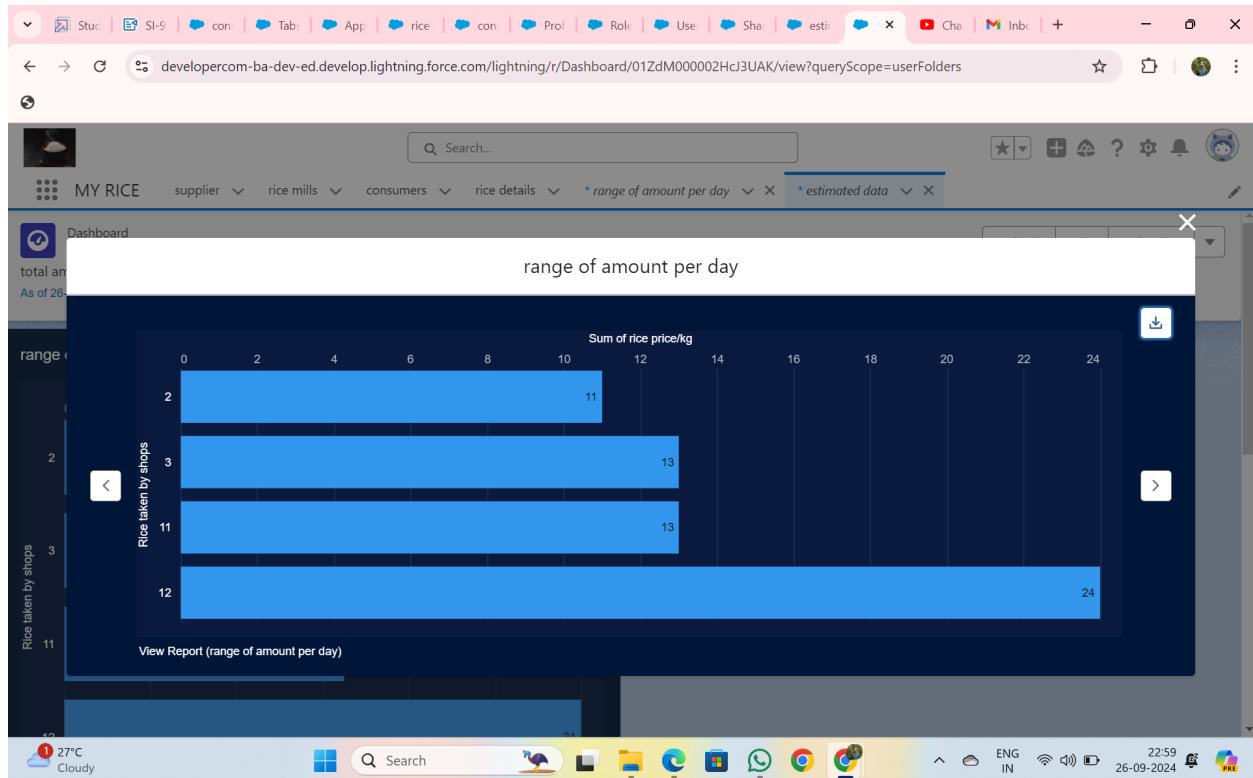
All Favorites

27°C Cloudy

Search

ENG IN

22:58 26-09-2024



TASK 12 : APEX

Apex is a strongly typed, object-oriented programming language that allows developers to execute flow and transaction control statements on the Lightning platform server in conjunction with calls to the Lightning Platform API. Using syntax that looks like Java and acts like database stored procedures, Apex enables developers to add business logic to most system events, including button clicks, related record updates, and Visualforce pages. Apex code can be initiated by Web service requests and from triggers on objects.

It is as similar as java i.e, it also supports OOP(Object oriented programming) like Classes, objects, methods.

Creating Classes :

Apex classes are modeled on their counterparts in Java. You'll define, instantiate, and extend classes, and you'll work with interfaces, Apex class versions, properties, and other related class concepts.

- **Class:**

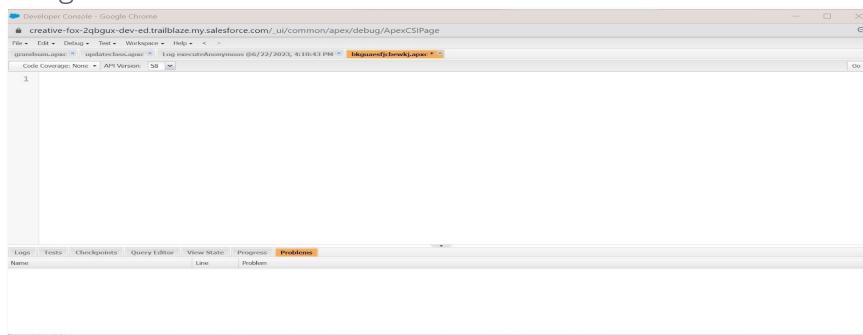
As in Java, you can create classes in Apex. A class is a template or blueprint from which objects are created. An object is an instance of a class.

- **Object**

Object is an instance of a class, where it can access all the properties that are present in a class i.e, variables and methods.

Creating an Apex Class(ConsumerRecord)

1. Login to the Salesforce account and navigate to the gear account in the top right corner.
2. Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.



3. Then you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Class.
4. Enter the name of the class(ConsumerRecord) to create a new class file.

Code Snippet :

```
class ConsumerRecord {
    public static void sendEmailNotification (List<consumer__c> con){
        for(consumer__c c:con)
        {
            Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
            email.setToAddresses( new List<String>{c.email__c});
            email.setSubject('Welcome to our company');
            email.setPlainTextBody('Dear ' + ' '+ '\n\nWelcome to MY RICE!'+ 'You have been seen
as a valuable customer to us. Please continue your journey with us, while we try to provide you
with good quality resources.'+'\n'+
                'We are proud to associate with valuable customers like you and we
look forward to collaborating with you by providing more and more exciting discounts or even
product offers too.' + '\n'
                +'So why taking a step back, take a leap of faith and shop with us more,
while we provide with the valuable products and offers'+'\n'+'\n'+'\n'+'\n'+
                'Thankyou for buying '+ " "+'Here are some of the products that are
brought by the customers who similarly bought products like this'+'\n\n');
            Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
        }
    }
}
```

The screenshot shows the Salesforce Developer Console interface in Google Chrome. The title bar reads "Developer Console - Google Chrome". The address bar shows the URL "smartbridge26-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage". The top menu includes File, Edit, Debug, Test, Workspace, Help, and a dropdown for "Code Coverage: None" and "API Version: 58". Below the menu is a tab bar with "ConsumerRecord.apxc *", "consumerTrigger.apxc", "RiceDetails.apxc", and "RiceDetail.apxt". The main area displays the Apex code for the "sendEmailNotification" method. The code includes several multi-line strings with embedded comments explaining the message content. The code editor has syntax highlighting and line numbers from 1 to 19. At the bottom, there are tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems, with the Problems tab currently selected. The status bar at the bottom shows "Name" and "Line Problem".

```
1  class ConsumerRecord {
2      public static void sendEmailNotification (List<consumer__c> con){
3          for(consumer__c c:con)
4          {
5              Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
6              email.setToAddresses( new List<String>{c.email__c});
7              email.setSubject('Welcome to our company');
8              email.setPlainTextBody('Dear ' + ' '+ '\n\nWelcome to MY RICE!'+ 'You have been seen as a valuable customer to us. Please continue your
9                  'We are proud to associate with valuable customers like you and we look forward to collaborate with you by pr
10                  +'So why taking a step back, take a leap of faith and shop with us more, while we provide with the valuable p
11                  'Thankyou for buying '+ " "+'Here are some of the products that are brought by the customers who similarly bo
12              Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
13
14
15
16
17
18
19 }
```

Creating an Apex Trigger

How to create a new trigger :

While still in the trailhead account, navigate to the gear icon in the top right corner. Click on developer console and you will be navigated to a new console window. Click on the File menu in the toolbar, and click on new? Trigger. Enter the trigger name and the object to be triggered.

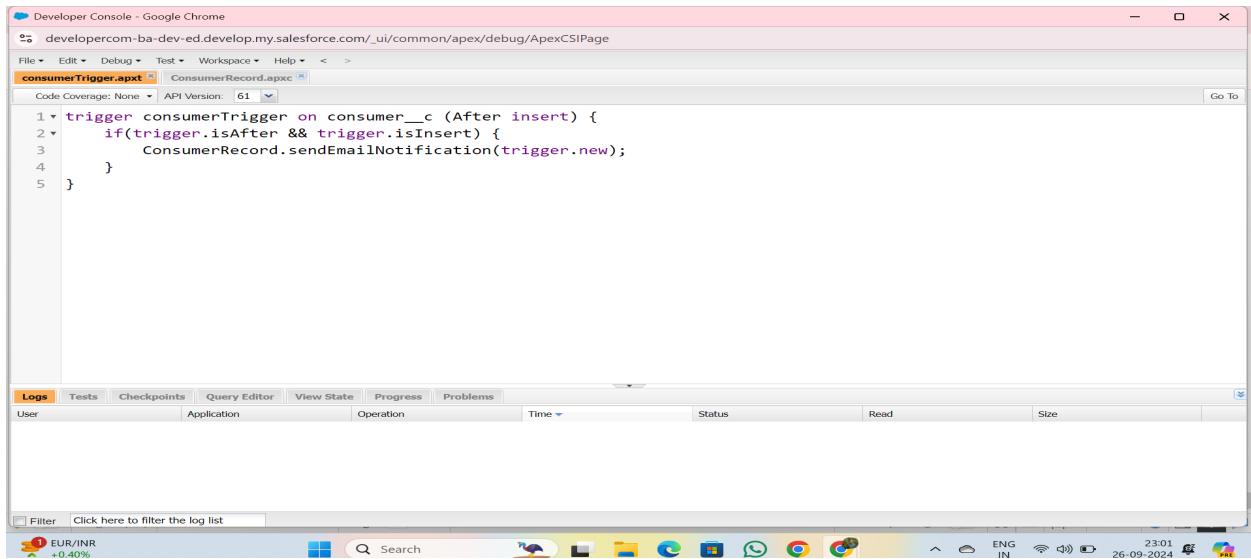
Syntax For creating trigger :

The syntax for creating trigger is :

```
Trigger [trigger name] on [object name]( Before/After event)  {  
    //Trigger Logic  
}
```

Trigger code:

```
trigger consumerTrigger on consumer__c (After insert) {  
    if(trigger.isAfter && trigger.isInsert) {  
        ConsumerRecord.sendEmailNotification(trigger.new);  
    }  
}
```



Developer Console - Google Chrome
developercom-ba-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

consumerTrigger.aplx ConsumerRecord.apxc

Code Coverage: None API Version: 61 Go To

```
1 public class ConsumerRecord {
2     public static void sendEmailNotification (List<consumer__c> con){
3         for(consumer__c c:con)
4             {
5                 Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
6                 email.setToAddresses( new List<String>{c.email__c});
7                 email.setSubject('Welcome to our company');
8                 email.setPlainTextBody('Dear ' + ' '+ ',\n\nWelcome to MY RICE!'+'You have been seen as a valuable cust
9                     'We are proud to associate with valuable customers like you and we look forwa
10                         +'So why taking a step back, take a leap of faith and shop with us more, whil
11                             'Thankyou for buying '+ '' +'Here are some of the products that are brought t
12                                 Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
13
14             }
15     }
16 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

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