CRM APPLICATION FOR WHOLESALE RICE MILL

Overview

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 customerexperiences, 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

a. Daily Salesand Production Reports: Generatesdetailed reports on how much rice is produced &sold each day.
b. Revenue Reports:Provides insights into daily revenuegenerated.

c. Customer Analytics: Tracks popular rice types and most frequent buyers.

d. Resource Allocation: Helps owners understand data for betterresource allocation and future planning

Rollup Summary Field

a. Purpose: Summarizes data from a child object to a parent objectthat shares a master-detail relationship.
b. Functions: Can use COUNT,SUM, MIN, and MAX functions.

Cross-Object Formula Field

c. Purpose: References fields from another object in Salesforce.
d. Function: Calculates the total amount payable by multiplying the number of rice units taken by theprice per kg.

Validation Rules

- Purpose: Ensures data integrity by validating user inputs.
- IsBlank Formula: Verifiesif a field is blank and displaysan error message if the rule returnsa value of "True".

Permission Sets

- Organization Wide Defaults(OWD): Defines the baseline level of accessfor the most restricted user.
- Roles and Access:
    - Owner: Can view recordsof employers and workers.
    - Employer: Can viewrecords of workers.

Milestone 1 - Salesforce

Introduction

Are you new to Salesforce? Not sure exactlywhat it is, or how to use it? Don'tknow where you shouldstart on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module,we'll take you through these features and answer the question, "What is Salesforce, anyway?".

What Is Salesforce?

Salesforce is your customersuccess platform, designedto help you sell, service, market, analyze,and connect with yourcustomers. Salesforce has everything you need to run your business from anywhere. Usingstandard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

Activity 1: Creating a DeveloperAccount

To start using Salesforce, the first step is to create a developer org. Follow the steps below to create your Salesforce Developer Account:

Go to the Signup Page

a. Navigate to the Salesforce DeveloperSignup page: [Salesforce Developer Signup]

Fill Out the Signup Form

b. First Name : Kavya Samitha

c. Last Name : Bollareddy

d. Email : kavyasamithabollareddy@gmail.com

e. Role : Developer

f. Company : NA

g. Country : India

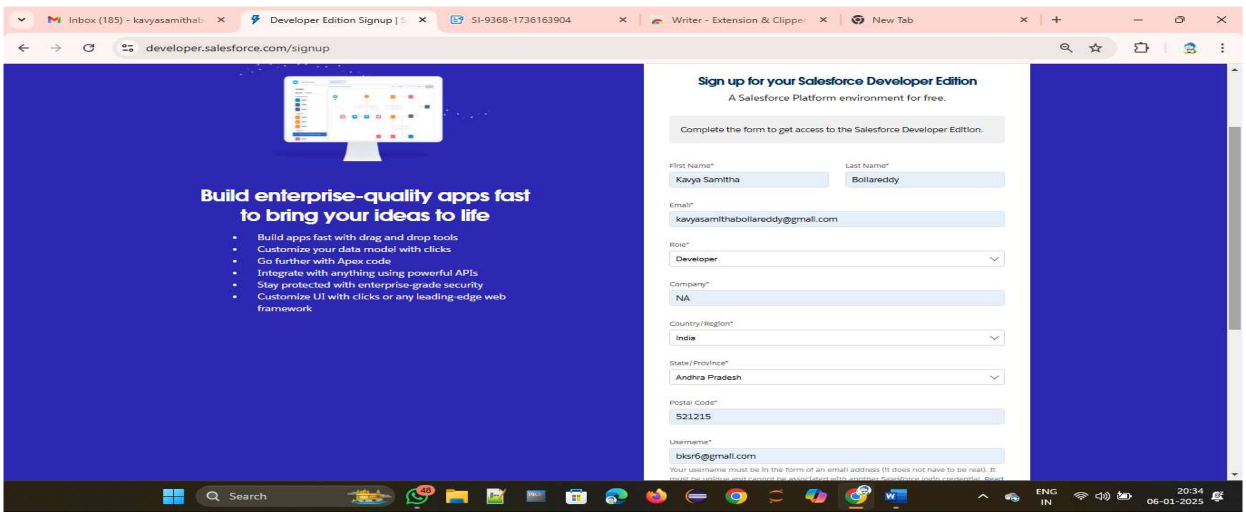
h. Postal Code :521215

i. Username :bksr6@gmail.com

Submit the Form

j. After filling in the details,click on the "Sign me up" button

You have successfully createda Salesforce Developer Account.You will receivea confirmation emailwith further instructions to complete the setup.

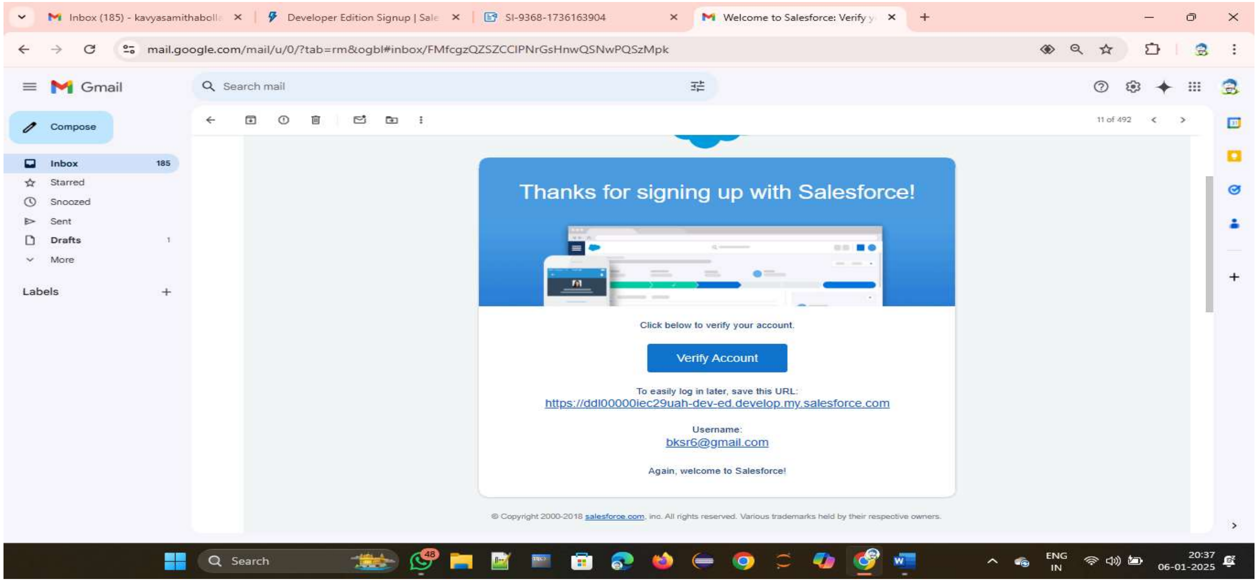


Activity 2: Account Activation

After creatingyour Salesforce DeveloperAccount, you need to activateit. Follow thesesteps to activateyour account:

Check Your Email

a. Go to the inbox of the emailaddress you used while signingup. The verification emailmay take 5-10 minutes to arrive.



Verify Your Account

b. Open the email from Salesforce and click on the "Verify Account" link.

c. On the verification page, create a password for your account.

d. Answer a security questionfor account recovery.

e. Click on "Change Password".

Milestone 2 - Object

What Is an Object?

Salesforce objectsare database tables that permityou to store data that is specificto an organization.

Types of Salesforce Objects

Salesforce objectsare of two types:

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

To Navigate to Setup Page:

i. Click on the gear icon
ii. Click on Setup

To Create an Object:

c. From the setup page, click on ObjectManager

d. Click on Create

e. Click on Custom Object

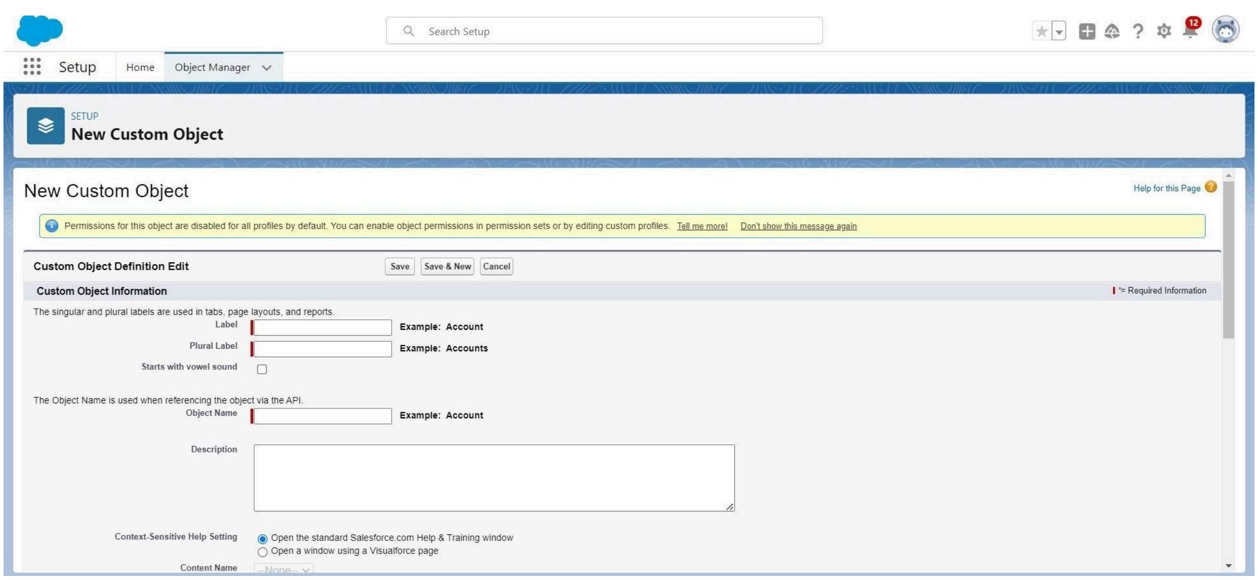
f. On the CustomObject defining page:

g. Enter the Label Name and Plural Label Name

h. Click on AllowReports

i. Click on Allow Search

j. Click on Save



Activity 1: Create Supplier Object

To create a Supplierobject in Salesforce, follow these steps:

Navigate to Setup Page:

a. Click on the gear icon.

b. Click on Setup.

Create a Custom Object:

c. From the setup page, click on ObjectManager.

d. Click on Create.

e. Click on Custom Object.

Define the Custom Object:

f. Enter the Label Name : Supplier.

g. Enter the Plural Label Name : Suppliers.

h. Enter the RecordName Label and Format:

i. Record Name: Supplier Name

j. Data Type:Text

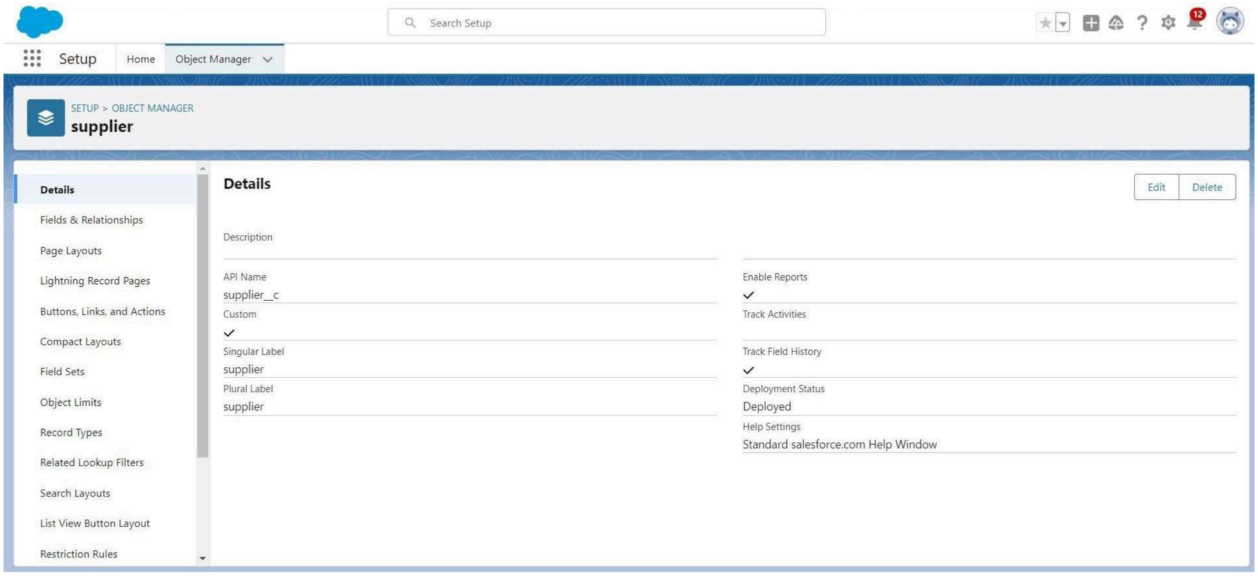
Set Additional Options:

k. Click on Allow Reports.

l. Click on Track Field History.

m. Click on AllowSearch.

Save the Custom Object:
Click on Save.


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
supplier
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Details
Edit
Delete
Description
API Name
supplier__c
Custom
Singular Label
supplier
Plural Label
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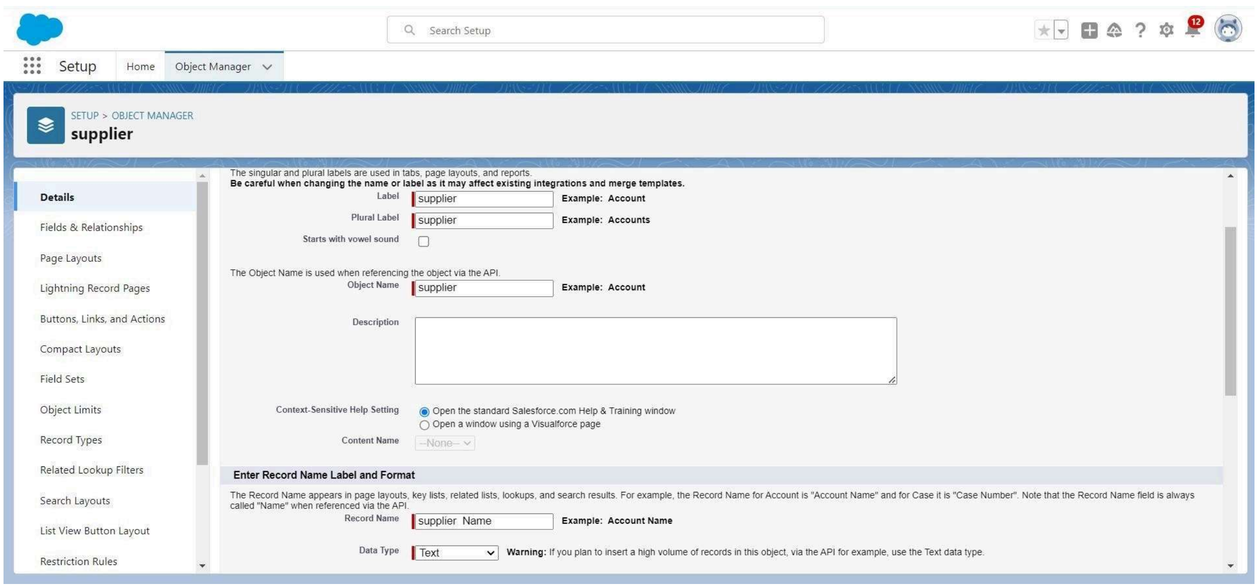
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window


Search Setup
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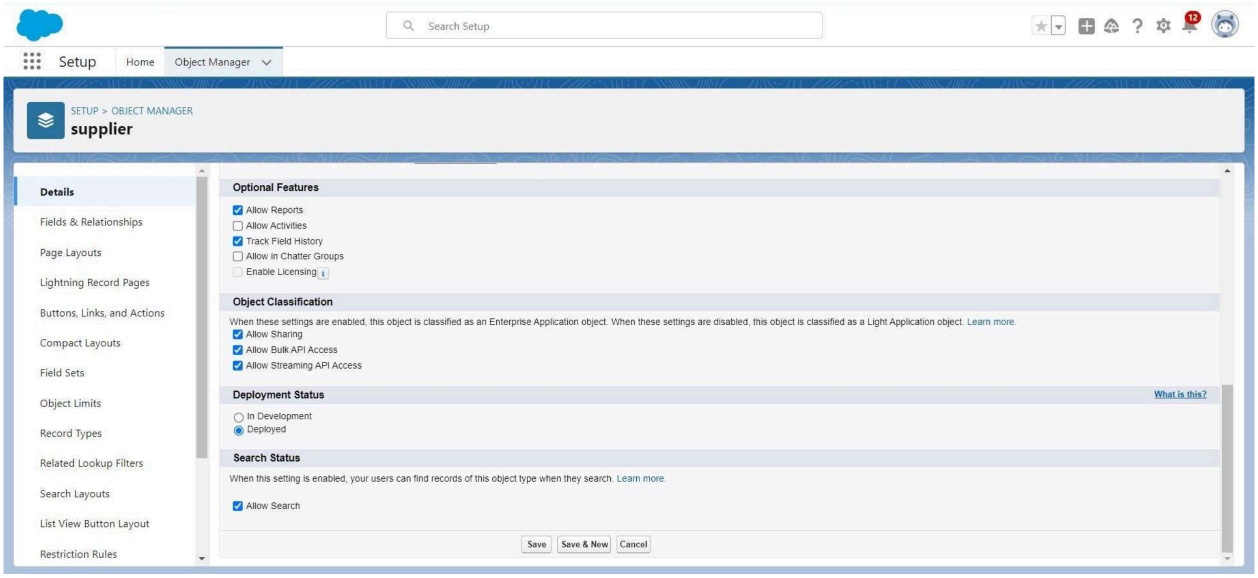
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.
Label
supplier
Example: Account
Plural Label
supplier
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
supplier
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page
Content Name
--None--
Enter Record Name Label and Format
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
Record Name
supplier Name
Example: Account Name
Data Type
Text
Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.



Activity 2: Create Rice Mill Object

To createa Rice Mill object in Salesforce, follow these steps:

Navigate to Setup Page:

a. Click on the gear icon.

b. Click on Setup.

Create a Custom Object:

c. From the setuppage, click on **Object Manager.**

d. Click on **Create.**

e. Clickon **Custom Object.**

Define the Custom Object:

f. Enter the **Label Name**: Rice Mill.

g. Enter the **Plural Label Name**: Rice Mills.

h. Enter the **Record Name Label and Format**:

i. **Record Name**: Leave it blank.

j. **Data Type**: Auto Number

k. **DisplayFormat**: rice-{000}

l. **StartingNumber**: 1

Set AdditionalOptions:

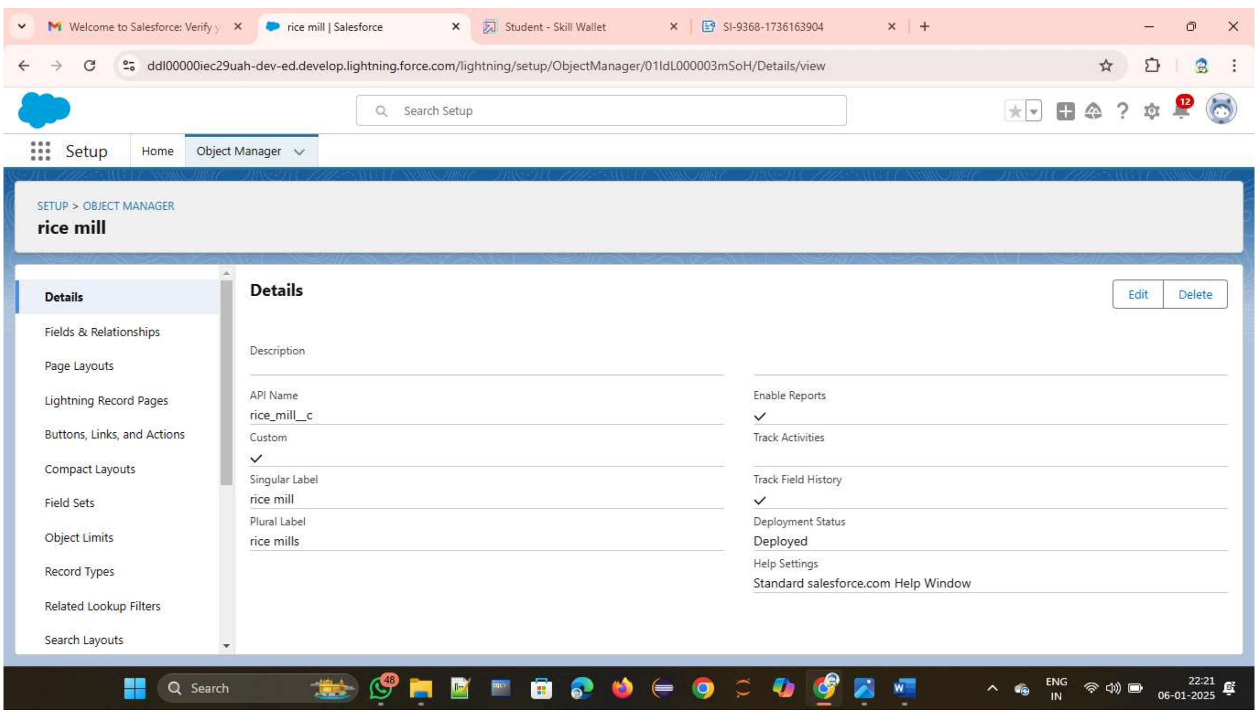
m. Click on **Allow Reports.**

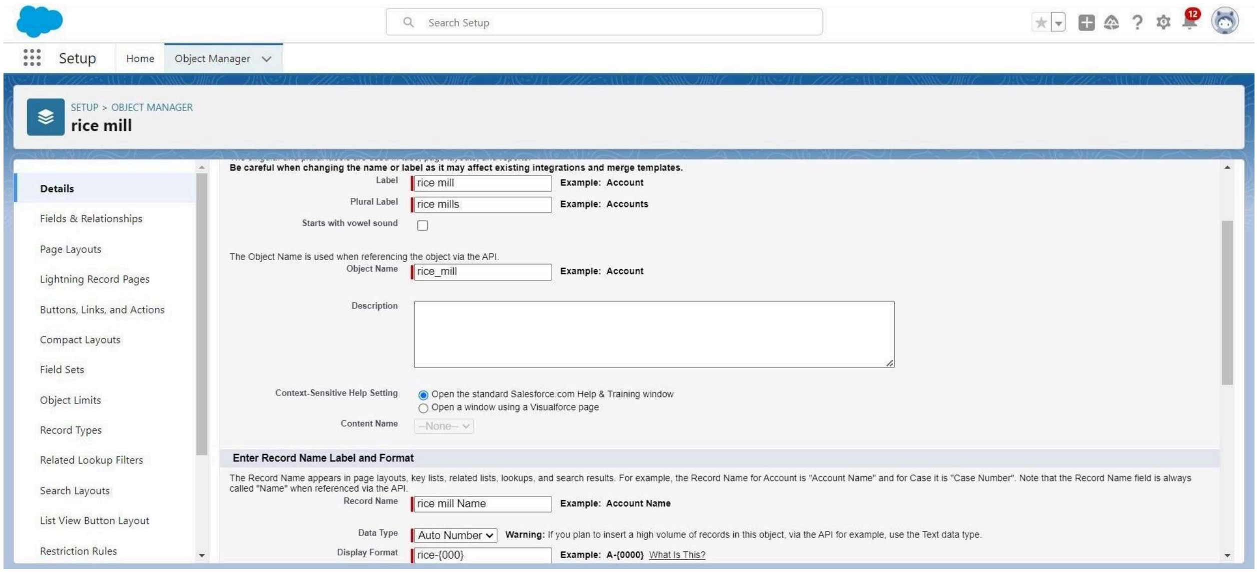
n. Click on **Track FieldHistory.**

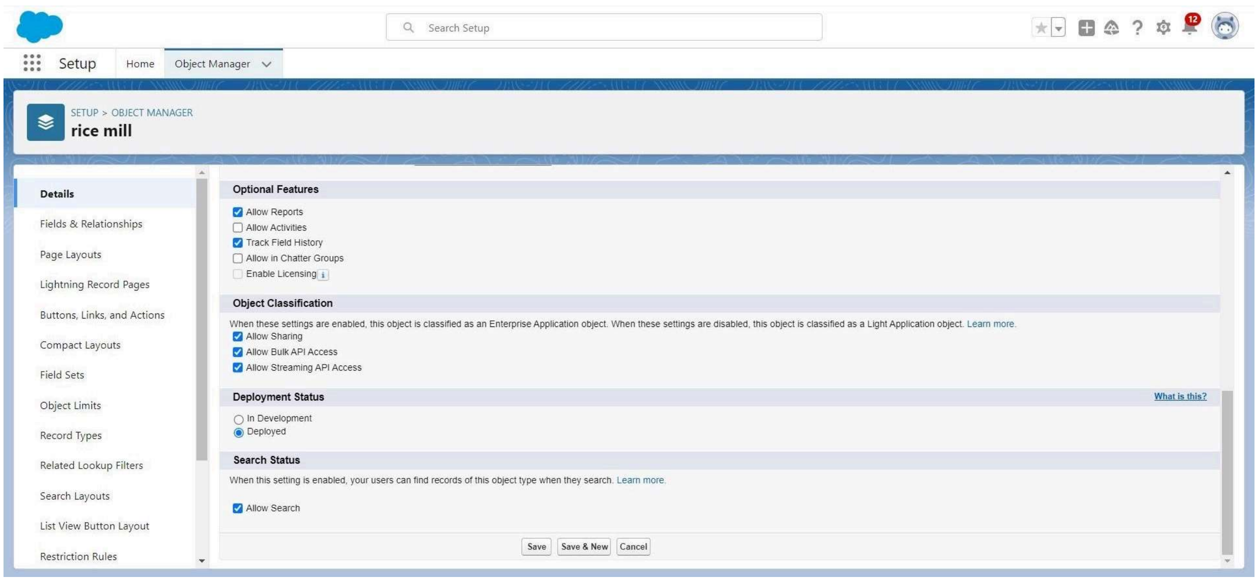
o. Click on **Allow Search.**

Save the Custom Object:

p. Click on **Save.**







Activity 3: Create Consumer Object

To createa Consumer object inSalesforce, follow the same steps as mentioned in Activity2 for creating the Rice Mill object. Use the following details for the Consumer object:

Navigate to Setup Page:

a. Click on the gear icon.

b. Click on Setup.

Create a Custom Object:

c. From the setup page, click on ObjectManager.

d. Click on Create.

e. Click on Custom Object.

Define the Custom Object:

f. Enter the Label Name: Consumer.

g. Enter the Plural Label Name: Consumers.

h. Enter the Record Name Label and Format:

i. Record Name: Leave it blank.

j. Data Type:Auto Number

k. Display Format: consumers-{000}

l. Starting Number: 1

Set Additional

Options:

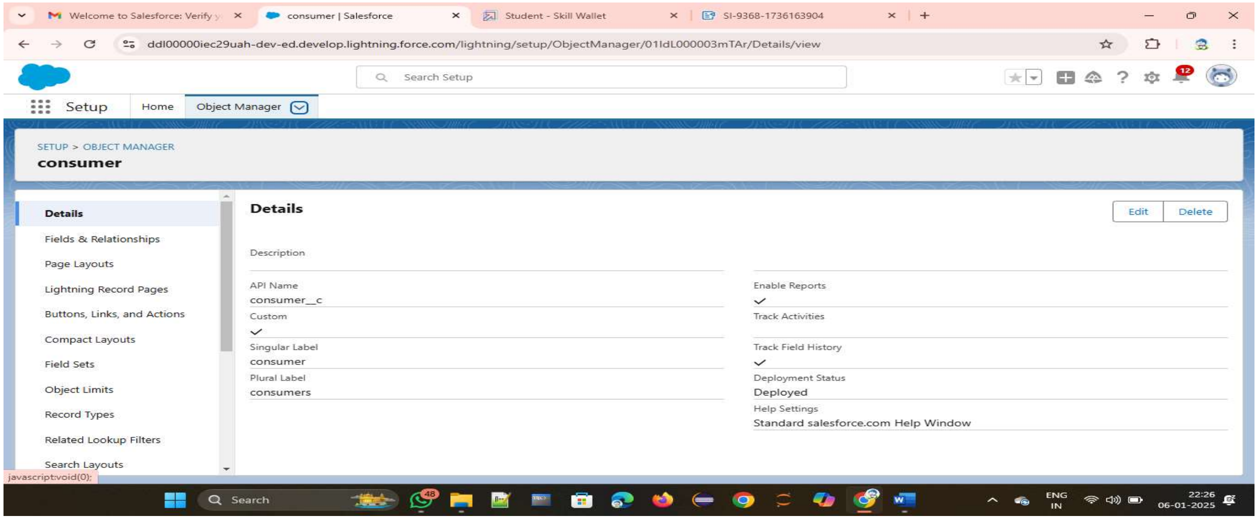
m. Click on AllowReports.

n. Click on Track Field History.

o. Click on AllowSearch.

Save the Custom Object:

p. Click on Save.


Welcome to Salesforce: Verify y
consumer | Salesforce
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Search Setup
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Home
Object Manager
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consumer
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Details
Edit
Delete
Description
API Name
consumer__c
Custom
Singular Label
consumer
Plural Label
consumers
Enable Reports
Track Activities
Track Field History
Deployment Status
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Help Settings
Standard salesforce.com Help Window
javascript:void(0);
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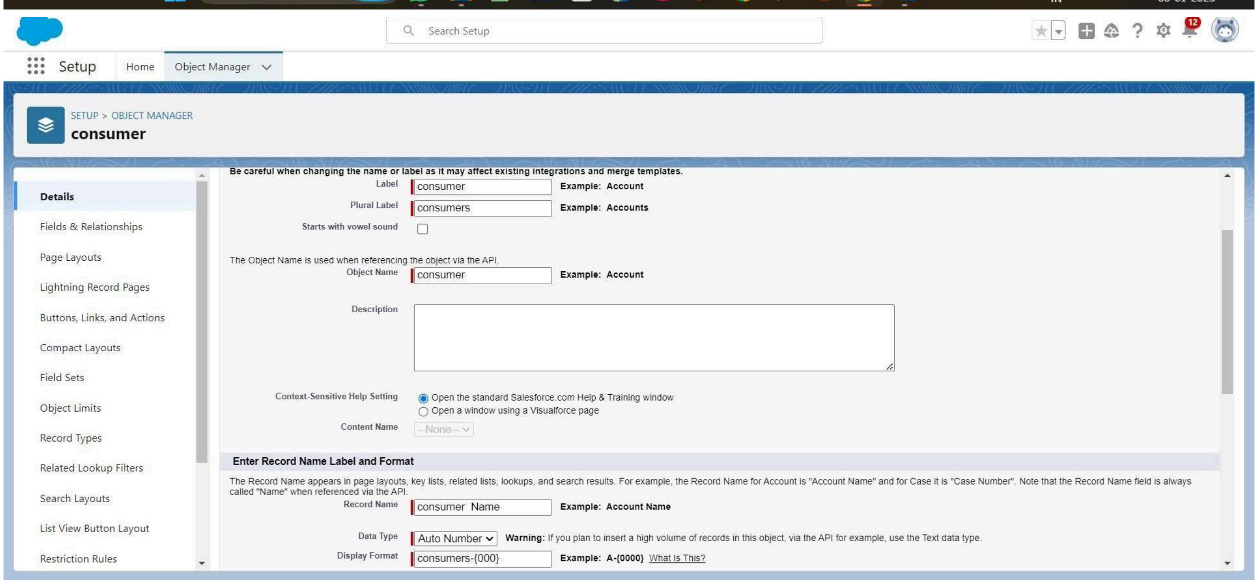
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
consumer
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
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Search Layouts
List View Button Layout
Restriction Rules
Be careful when changing the name or label as it may affect existing integrations and merge templates.
Label
consumer
Example: Account
Plural Label
consumers
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
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Example: Account
Description
Context-Sensitive Help Setting
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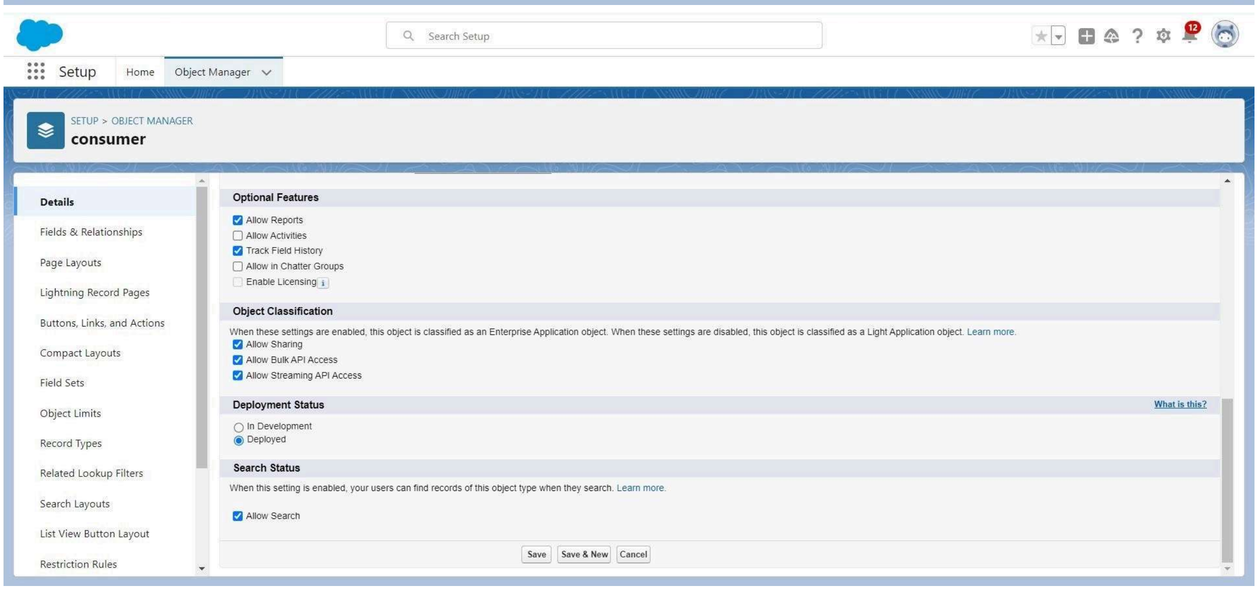
--None--
Enter Record Name Label and Format
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
Record Name
consumer Name
Example: Account Name
Data Type
Auto Number
Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.
Display Format
consumers-{000}
Example: A-{0000}
What Is This?


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
consumer
Details
Fields & Relationships
Page Layouts
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Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Optional Features
Allow Reports
Allow Activities
Track Field History
Allow in Chatter Groups
Enable Licensing
Object Classification
When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.
Allow Sharing
Allow Bulk API Access
Allow Streaming API Access
Deployment Status
What is this?
In Development
Deployed
Search Status
When this setting is enabled, your users can find records of this object type when they search. Learn more.
Allow Search
Save
Save & New
Cancel

Activity 4: Create Rice Details Object

To createa Rice Details object in Salesforce, followthese steps:

Navigate to Setup Page:

a. Click on the gear icon.

b. Click on Setup.

Create a Custom Object:

c. From the setup page, click on ObjectManager.

d. Click on Create.

e. Click on Custom Object.

Define the Custom Object:

f. Enter the Label Name: Rice Details.

g. Enter the Plural Label Name: Rice Details.

h. Enter the Record Name Label and Format:

i. Record Name: Leave it blank.

j. Data Type:Auto Number

k. Display Format:rice-{000}

l. Starting Number: 1

Set Additional Options:

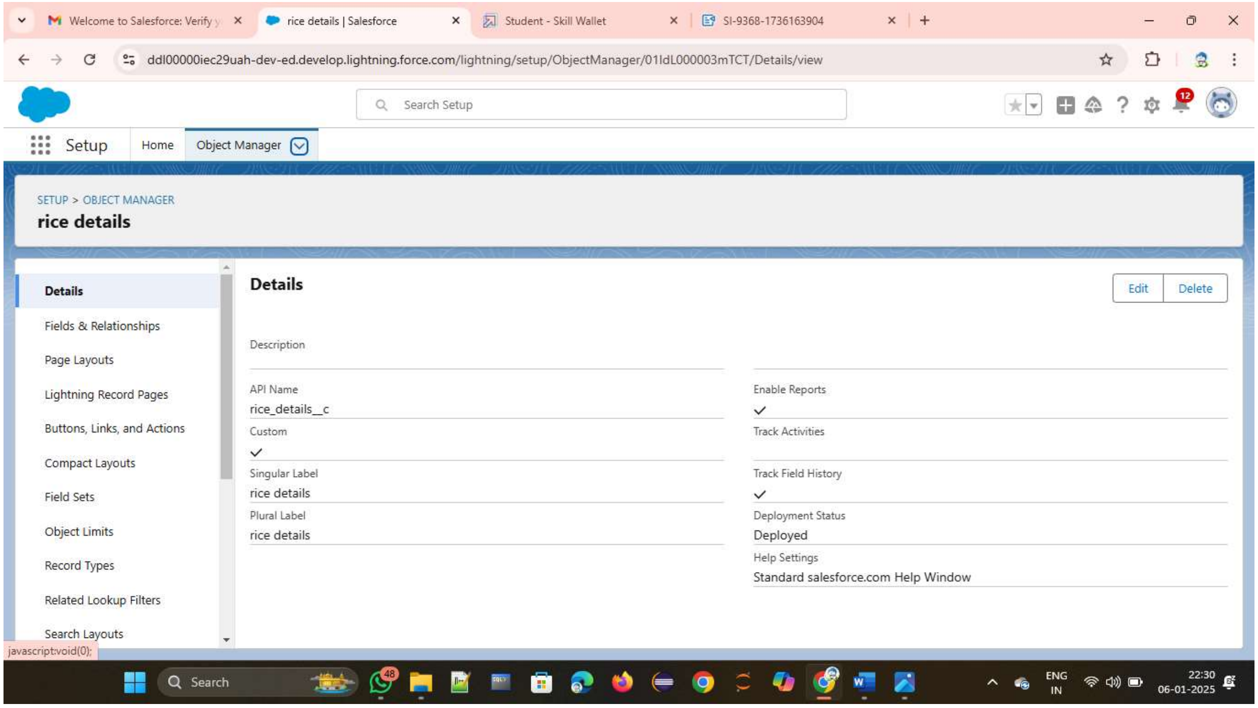
m. Click on Allow Reports.

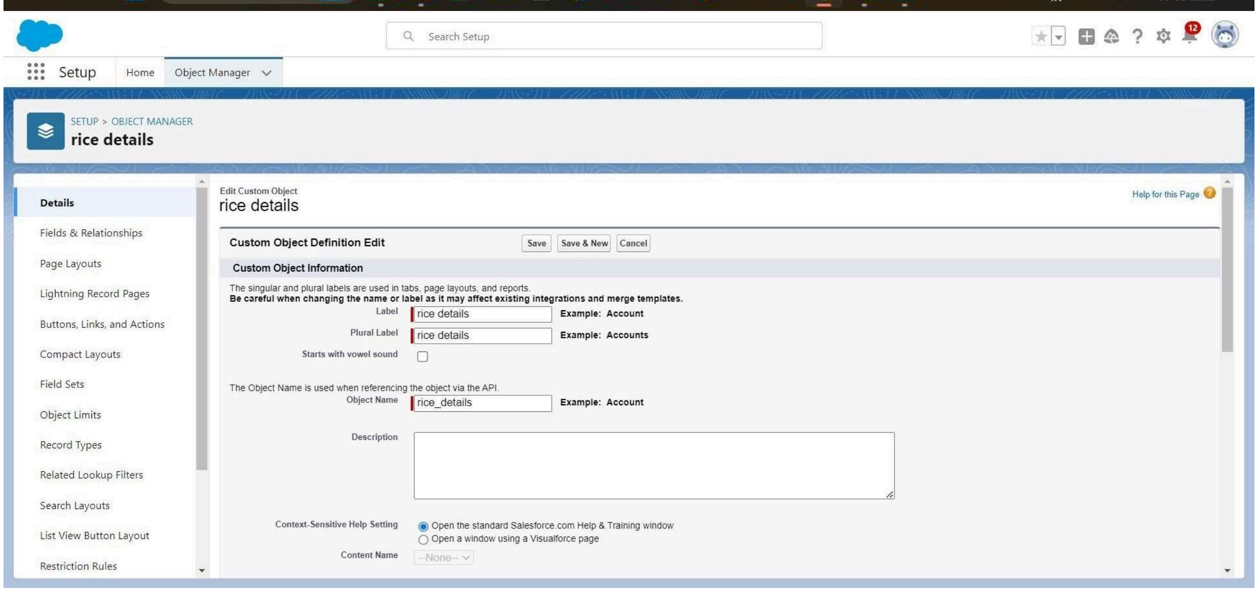
n. Click on Track Field History.

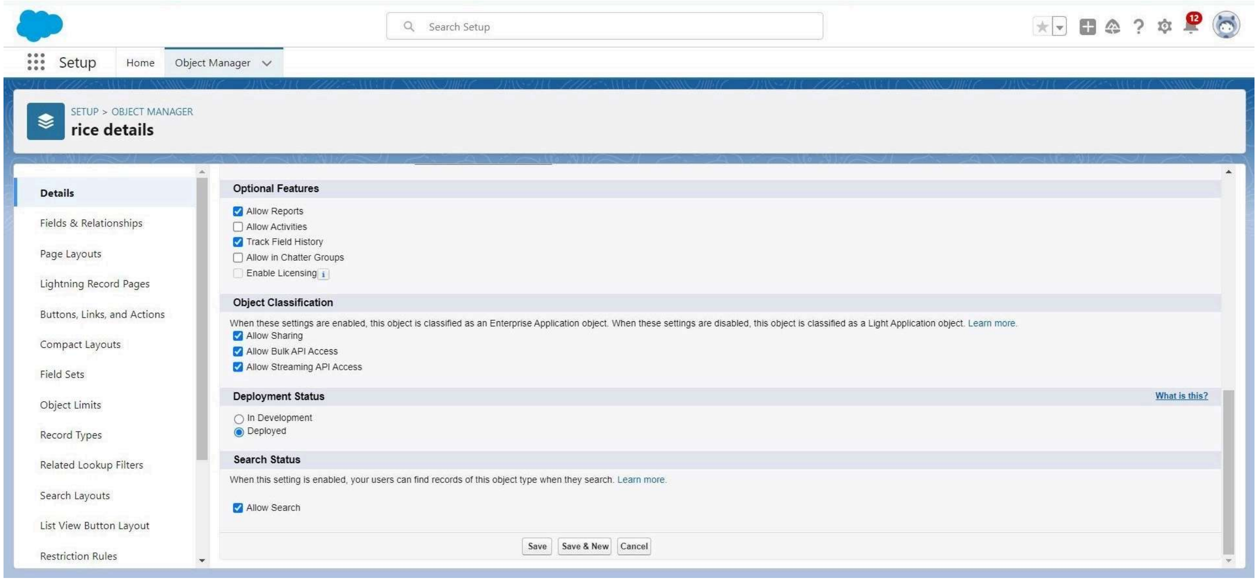
o. Click on Allow Search.

Save the Custom Object:

p. Click on Save.





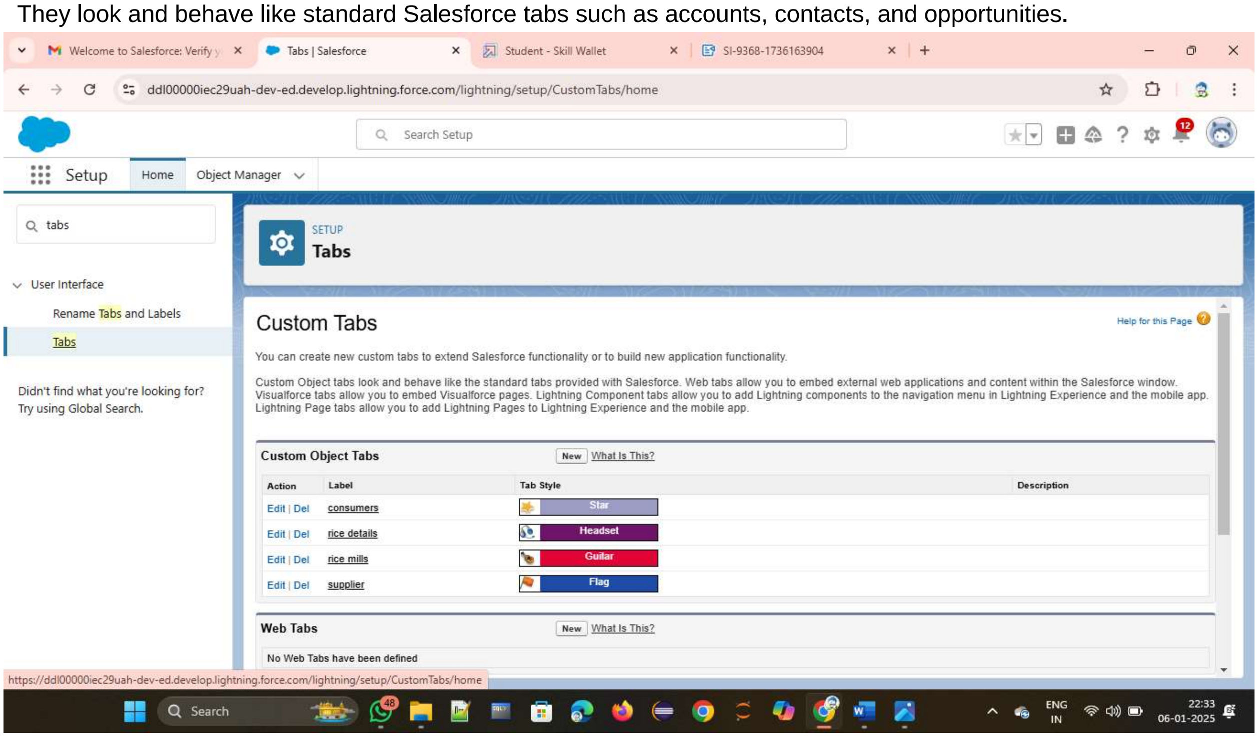


Milestone 3 - Tabs

Whatis a Tab?

A tab is a userinterface element used to build records for objects and view the records withinthose objects.

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



Activity 1: Creating a Custom Tab (Supplier)

To createa Tab for the Supplier object,follow these steps:

Navigate to Setup Page:

a. Go to the setup page.
b. Type "Tabs" in the Quick Find bar.
c. Click on Tabs.

Create a New Custom Object Tab:

d. Click on New under the Custom ObjectTabs section.

Select Object and Tab Style:

e. Select the Supplier object.
f. Choose the tab style.
g. Click on Next.

Add to ProfilesPage:

h. Keep it as default.
i. Click on Next.

Add to Custom App:

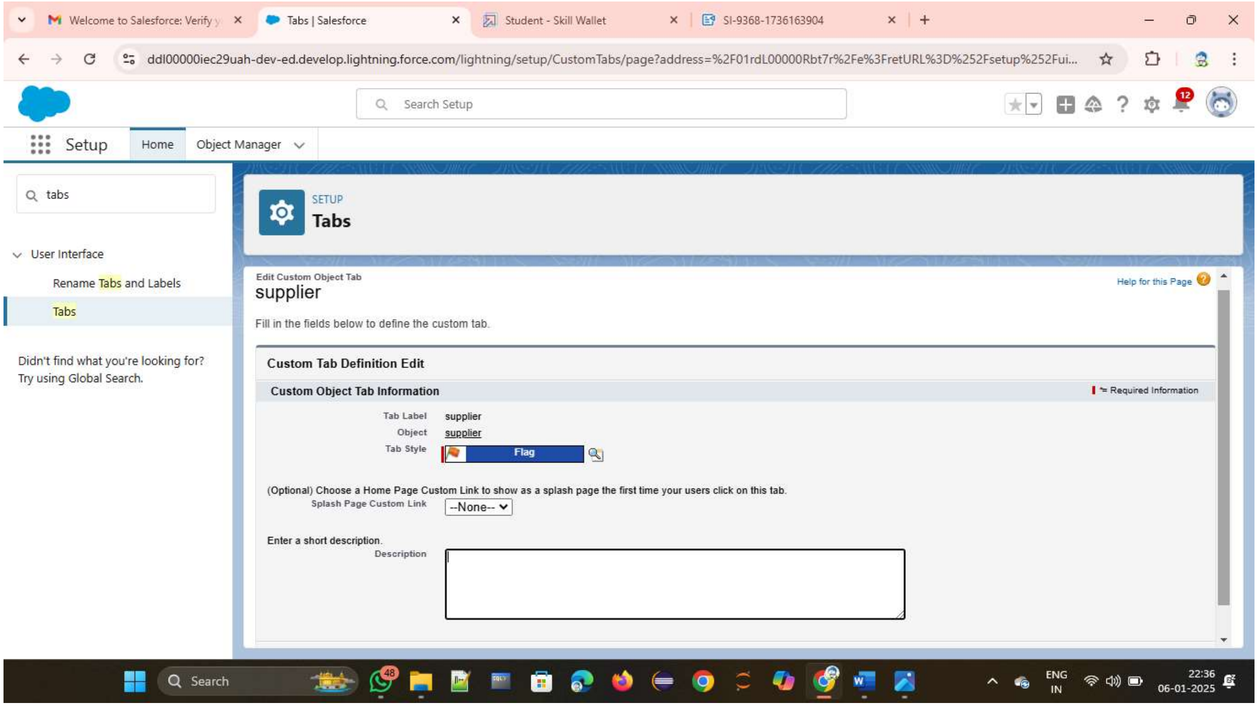
j. Uncheck the IncludeTab checkbox.

Append Tab to Users' ExistingPersonal Customizations:

k. Ensure that the Append tab to users' existing personal customizations option is checked.

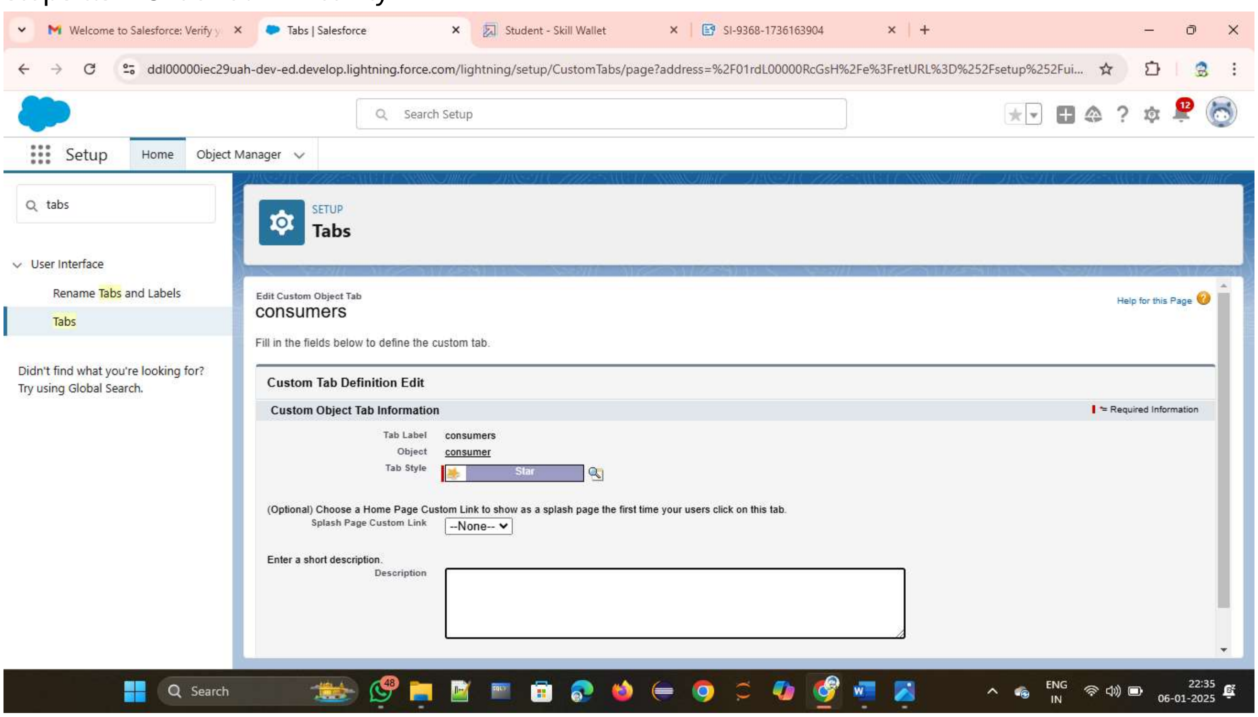
Save the Custom Tab:

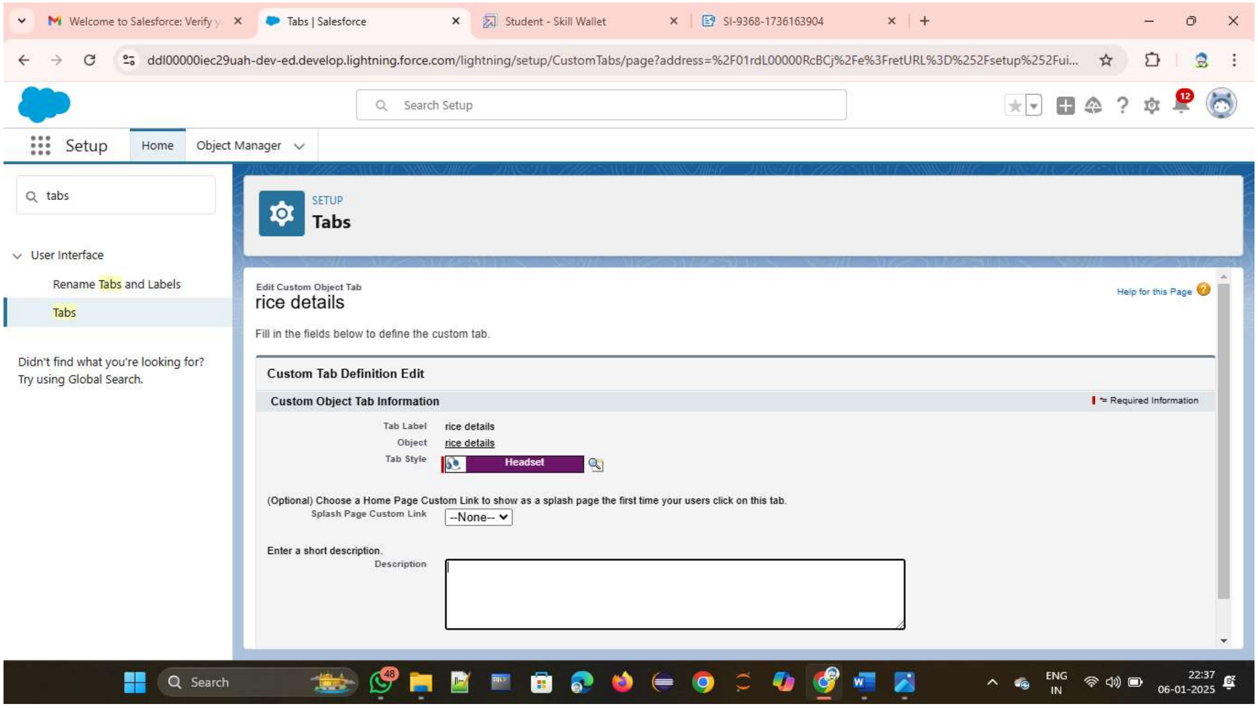
l. Click on Save.

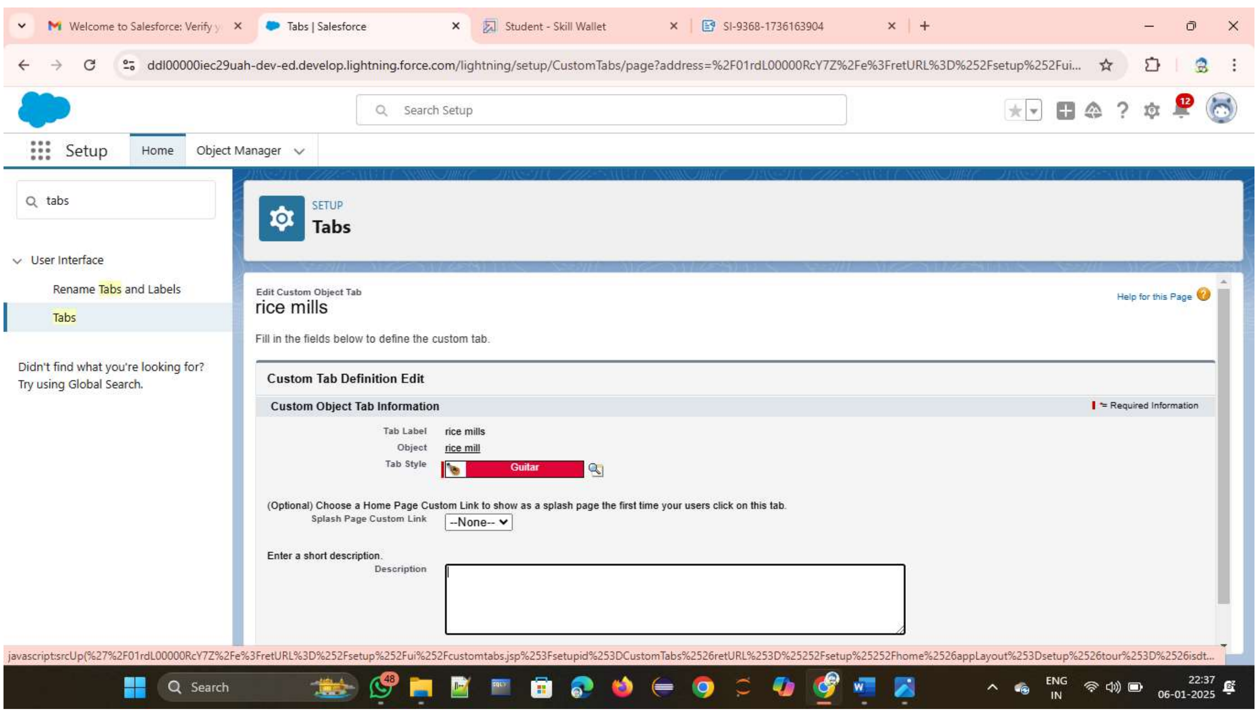


Activity 2: Creating RemainingTabs

To create tabs for the remaining objects(Rice Mill, Consumer,Rice Details), follow the same steps as mentioned in Activity 1







Milestone 4 - The Lightning App

An app is a collection of itemsthat work togetherto serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other itemsall 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 organization can work more efficiently by easily switching between apps.

Activity 1: Create a LightningApp

To createa Lightning app page, follow these steps:

Navigate to App Manager:

a. Go to the setup page.

b. Search for “App Manager” in theQuick Find bar.

c. Select “App Manager”.

d. Click on New Lightning App.

Fill in App Details:

e. Enter the app name as MY RICE.

f. Click Next.

App Options Page:

g. Keep the settingsas default.

h. Click Next.

Utility Items Page:

i. Keep the settingsas default.

j. Click Next.

Upload a Photo:

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

Add Navigation Items:

l. Select the items (Supplier, Rice Mill, Consumer, Rice Details) from the search bar.

m. Move the selected items using the arrow button.

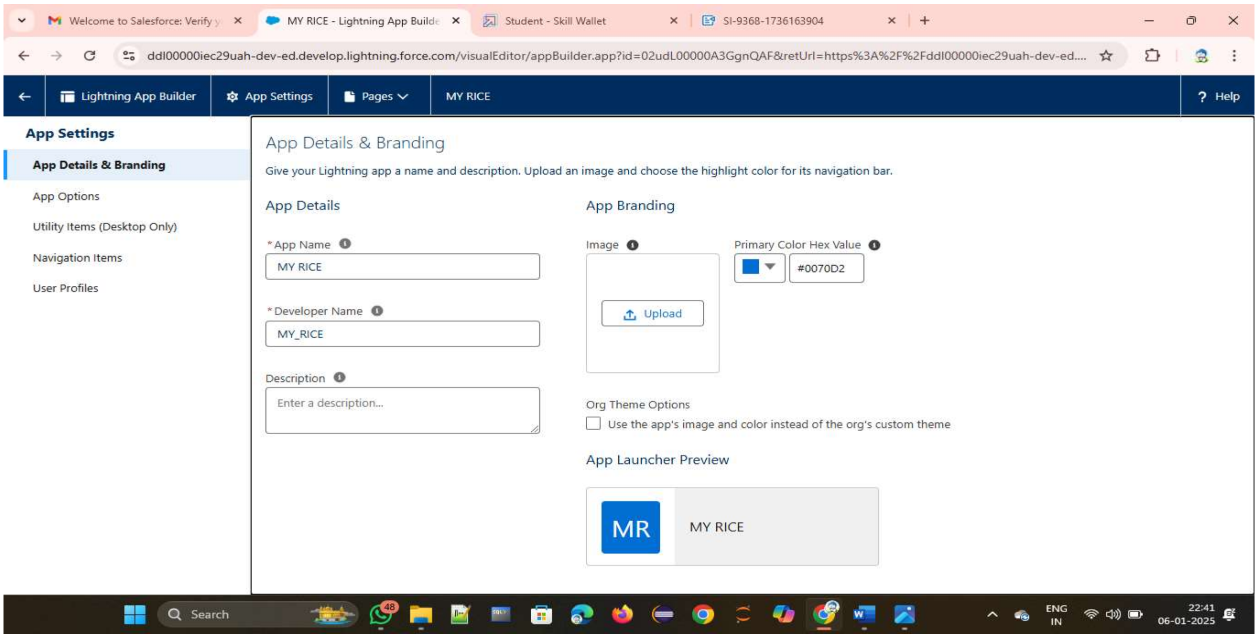
n. Click Next.

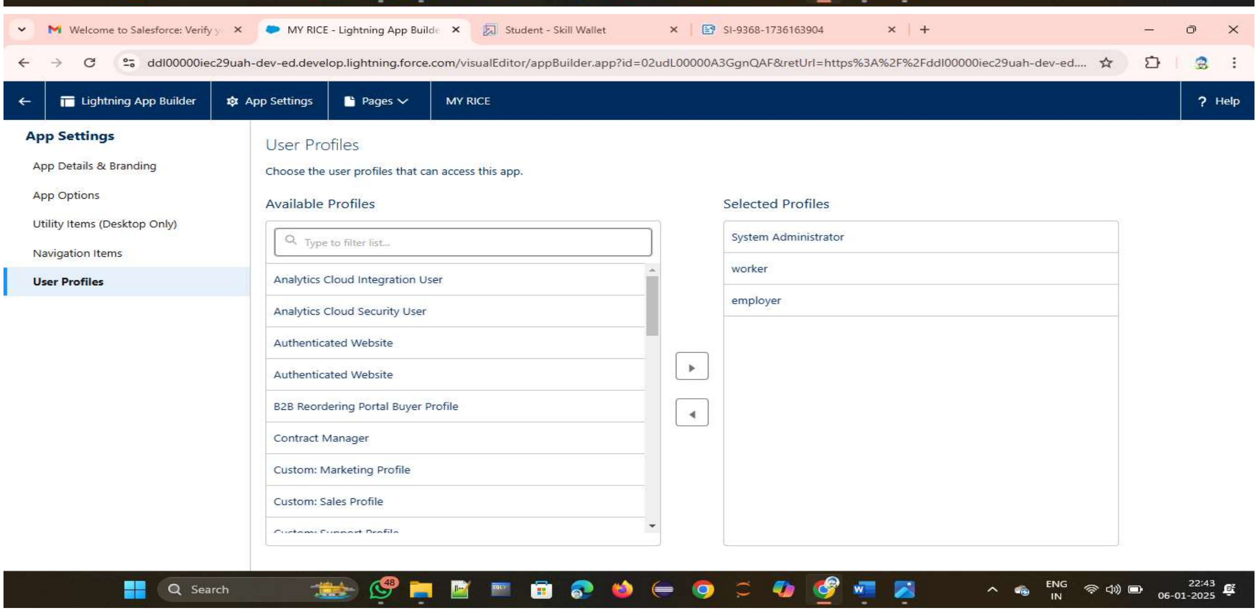
Add User Profiles:

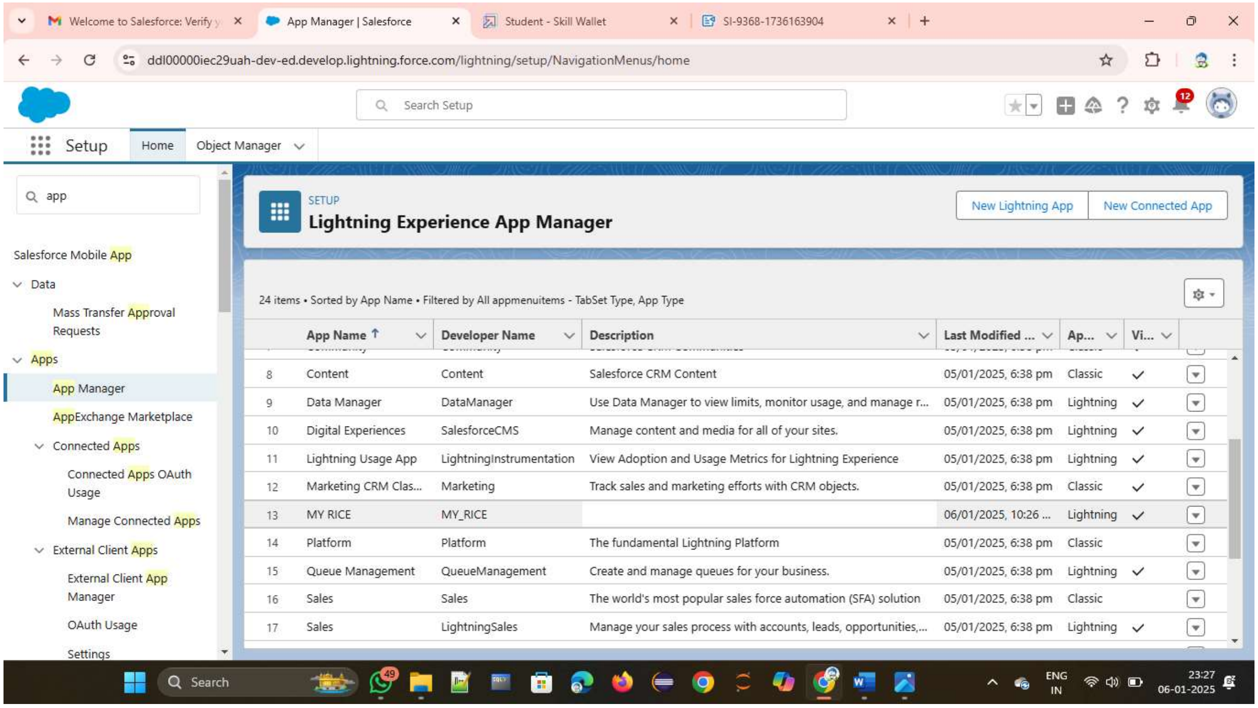
o. Search for profiles(System Administrator) in the searchbar.

p. Click on the arrow button to add the profile.

q. Click Save & Finish.







Milestone 5: Fields

When we talk about Salesforce, fields represent the data stored in the columns of a relational database. They can hold any valuable information that you require for a specificobject. The overallsearching, deletion, and editing of the records become simpler and quicker with fields.

Typesof Fields

1. Standard Fields
2. Custom Fields

Standard Fields

As the name suggests, 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 unless it is a non-required standard field. Otherwise, users have the optionto delete them freely at any point from the application. Some common fields you will find in every Salesforce application include:

a. Created By
b. Owner
c. Last Modified
d. Field Made During Object Creation

CustomFields

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to their requirements. Each organization or company can use them if necessary. It means you do not always need to include them in the records, unlikeStandard Fields. Hence,the final decisiondepends on the user, who can add or remove Custom Fields as needed.

Activity 1: Creating the Number Field in Rice Details Object

To create a numberfield in the Rice Detailsobject, follow these steps:

Navigate to Object Manager:

a. Go to the setup page.

b. Click on Object Manager.

Edit the Rice Details Object:

c. From the dropdown, click Edit for the Rice Detailsobject.

Create a New Field:

d. Click on Fields & Relationships.

e. Click on New.

Select Data Type:

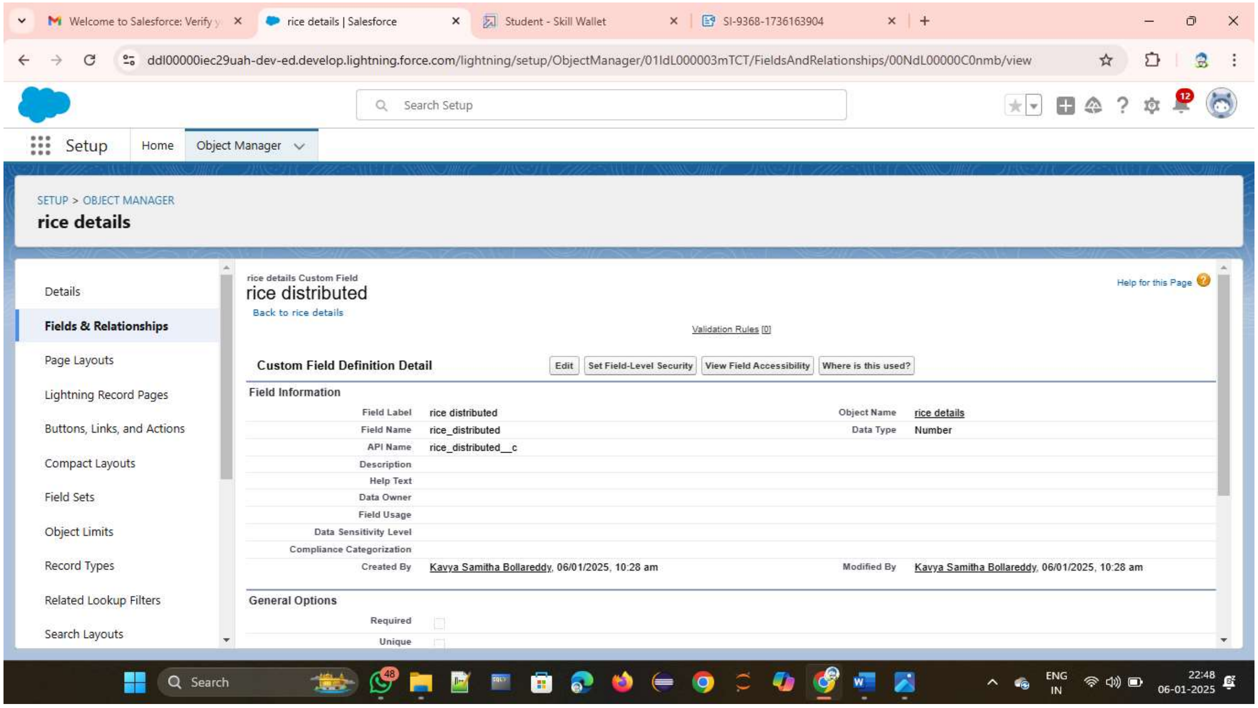
a. Select Number as the data type.

b. Click Next.

Define Field Properties:

c. Enter the Field Label as Rice Distributed.

d. Set the length to 5.



Activity 2: Creating Junction Object

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

Creating Junction Object:Rice Details with Supplier & Rice Mill To create a

Junction Object:

Navigate to Object Manager:

a. Go to the setup page.
b. Click on Object Manager.
c. From the dropdown, click Edit for the Rice Detailsobject.

Create a New Field:

d. Click on Fields & Relationships.
e. Click on New.

Select Data Type:

f. Select Master-Detail Relationship as the data type.

g. Click Next.

Relate to Supplier Object:

h. Select the relatedobject Supplier.

i. Click Next.

Define Field Properties:

j. Give the Field Label as Supplier Name.

k. Click Next.

l. Click Next again.

m. Click Save & New.

Repeat Steps for Rice Mill Object:

n. Follow the same steps from 1to 3.

o. Select the related object Rice Mill.

p. Click Next.

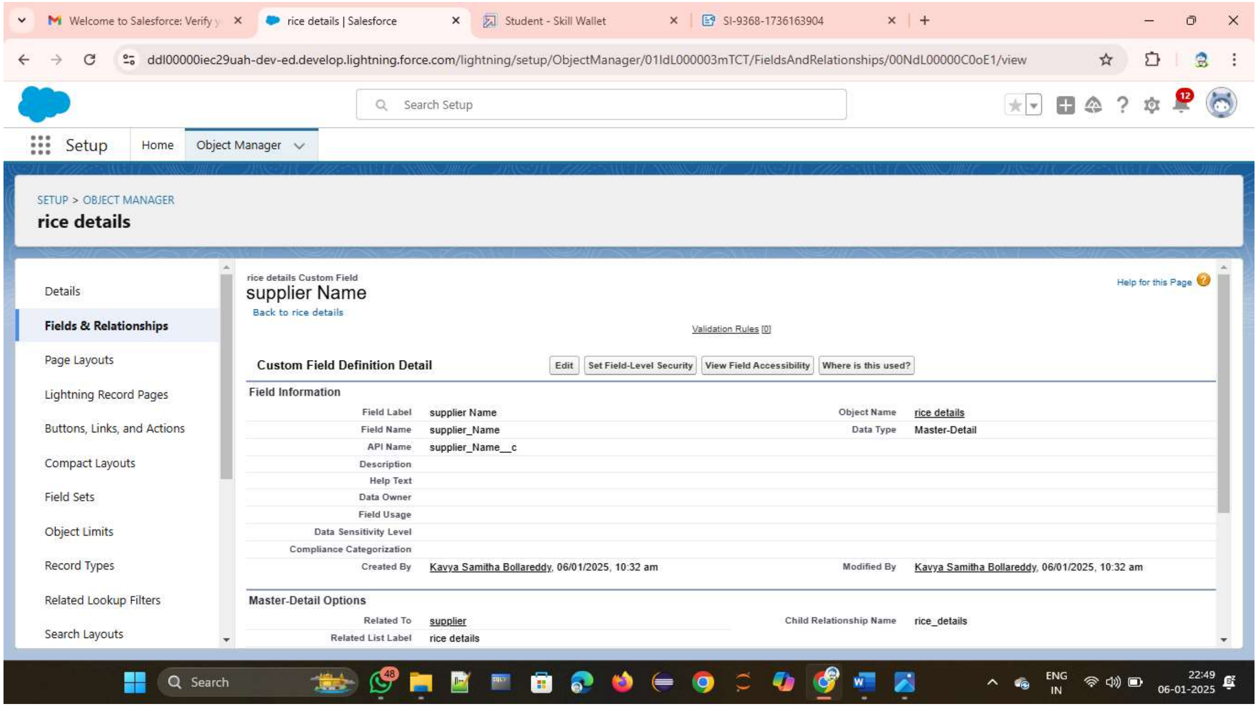
Define Field Properties for Rice Mill:

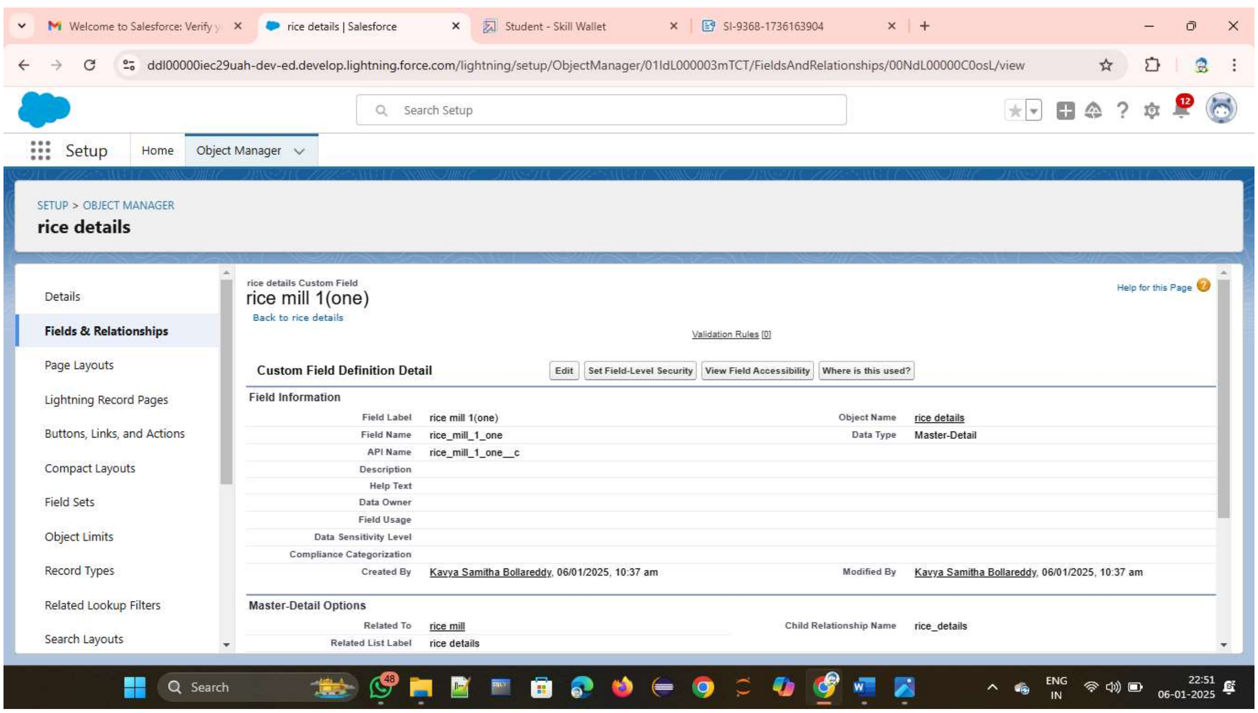
q. Give the Field Label as Rice Mill 1 (one).

r. Click Next.

s. Click Next again.

t. Click Save.





Activity 3: Creating a Master-Detail Relationship

A master-detail relationship is a type of relationship betweentwo objects where themaster object controlscertain 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:

Navigate to Object Manager:

a. Go to the setup page.
b. Click on Object Manager.
c. From the dropdown, click Edit for the Consumer object.

Create a New Field:

d. Click on Fields & Relationships.
e. Click on New.

Select Data Type:

f. Select Master-Detail Relationship as the data type.
g. Click Next.

Relate to Rice Mill Object:

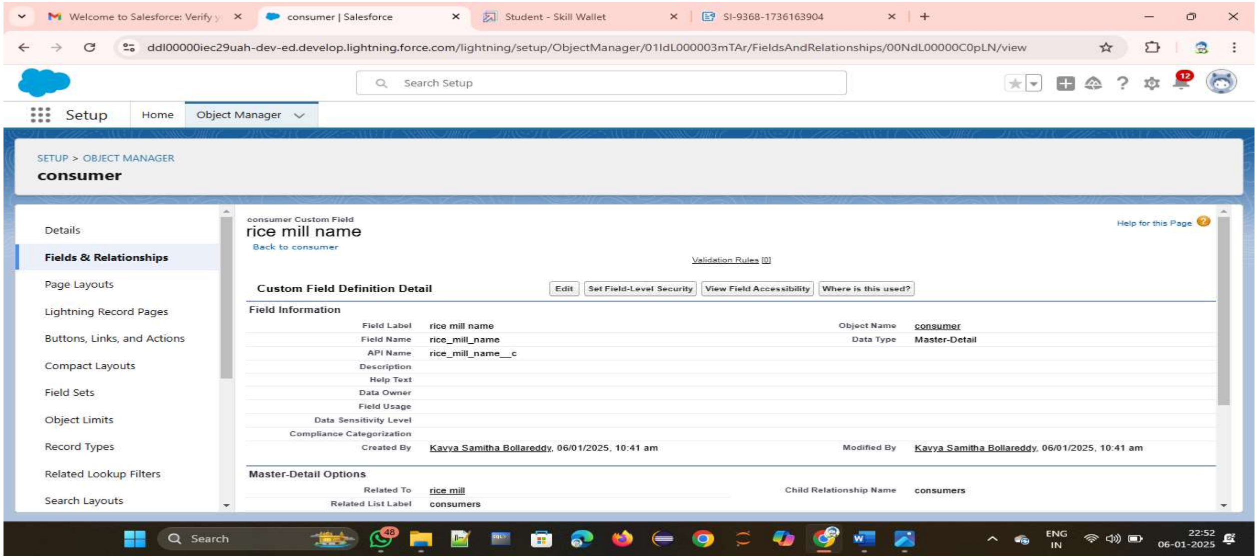
h. Select the relatedobject Rice Mill.
i. Click Next.

Define Field Properties:

j. Give the Field Label as Rice Mill Name.

k. Click Next. , Click Next again.

l. Click Save.



Activity 4: Creating the Roll-up Summary

A roll-upsummary field is a field that summarizes data from a child object to a parent object that shares a master- detail relationship. Roll-up summary fields can use the COUNT, SUM, MIN, and MAX functions. For example, you could use a roll-up 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 To create a

Roll-up Summary field:

Navigate to Object Manager:

a. Go to the setup page.
b. Click on Object Manager.
c. Type the object name Supplier in the searchbar.
d. Click on theobject.

Create a New Field:

e. Click on Fields & Relationships.
f. Click on New.

Select Data Type:

g. Select the data type as Roll-up Summary.
h. Click Next.

Define Field Properties for Supplier:

i. Give the Field Label as Sum of Rice Distributed. The Field Name will be auto-generated.

j. Click Next.

Configure Roll-upSummary for Supplier:

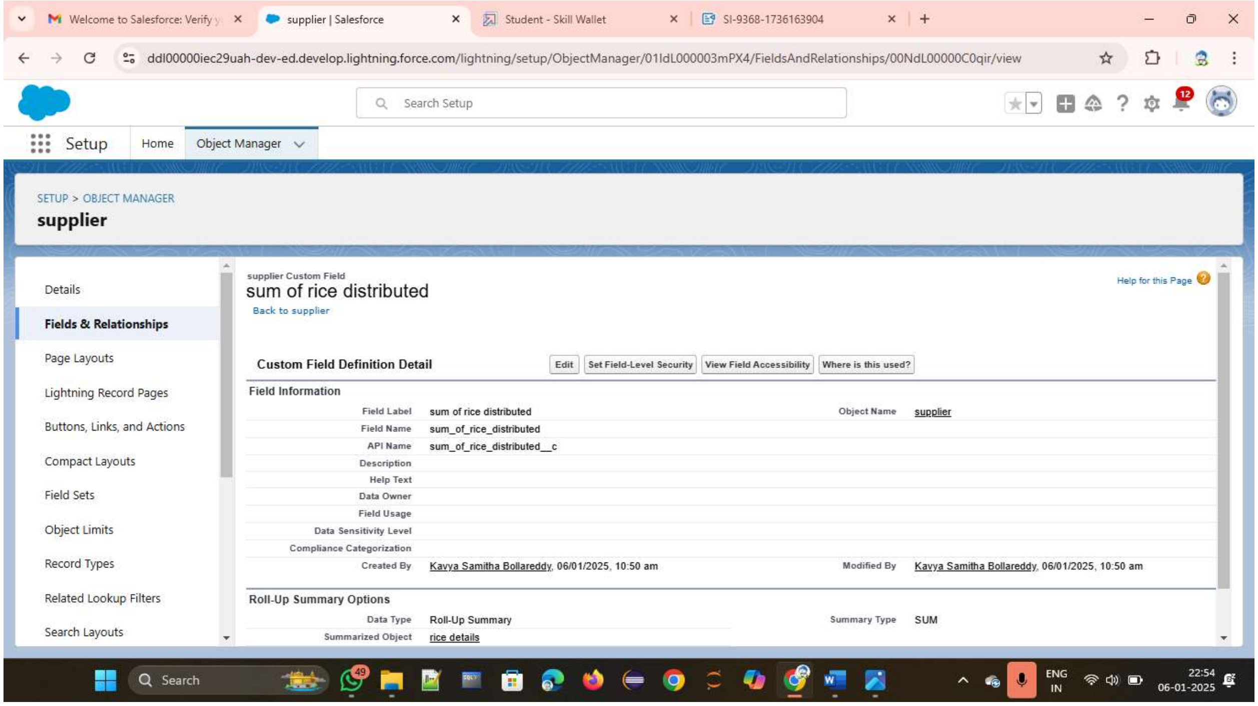
k. Select the summarized object as Rice Details.

l. Select the roll-up type as SUM.

m. Select the field to aggregateas Rice Distributed.

n. Click Next. , Click Next again.

o. Click Save.



Repeat Steps for Rice Mill Object:

a. Follow the same steps from 1 to 3 for the Rice Mill object.

b. Give the Field Label asRice Distributed to Shops. The Field Name will be auto-generated.

c. Click Next.

Configure Roll-upSummary for Rice Mill:

d. Select the summarized object as Rice Details.

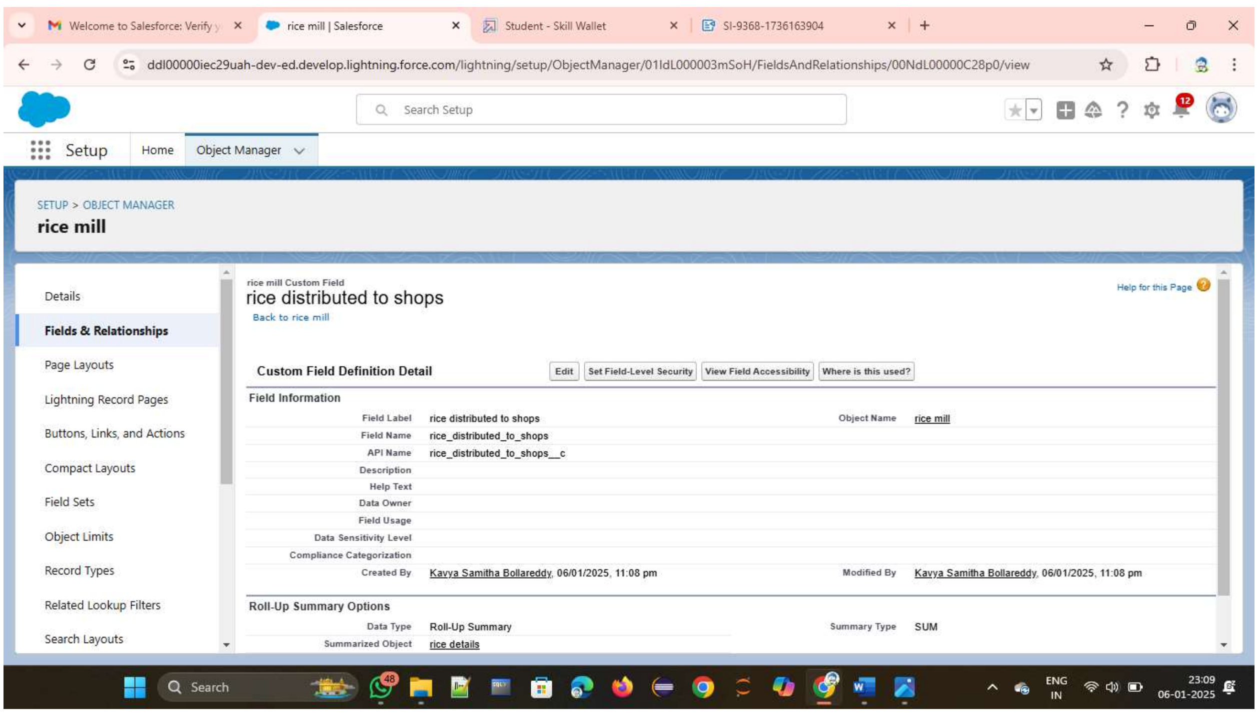
e. Select the roll-up type as SUM.

f. Select the field to aggregateas Rice Distributed.

g. Click Next. ,

h. Click Next again.

i. Click Save.



Additional Steps for Consumer Object Create the

Field:

a. Create the field Rice Taken by Shops in Kgs usingthe number datatypein the Consumer object.

Repeat Steps for Rice Mill Object:

b. Follow the same steps from 1 to 3 for the Rice Mill object.

c. Give the Field Label as Rice Taken. The Field Name will be auto-generated.

d. Click Next.

Configure Roll-upSummary for Rice Mill (Consumer):

e. Select the summarized object as Consumer.

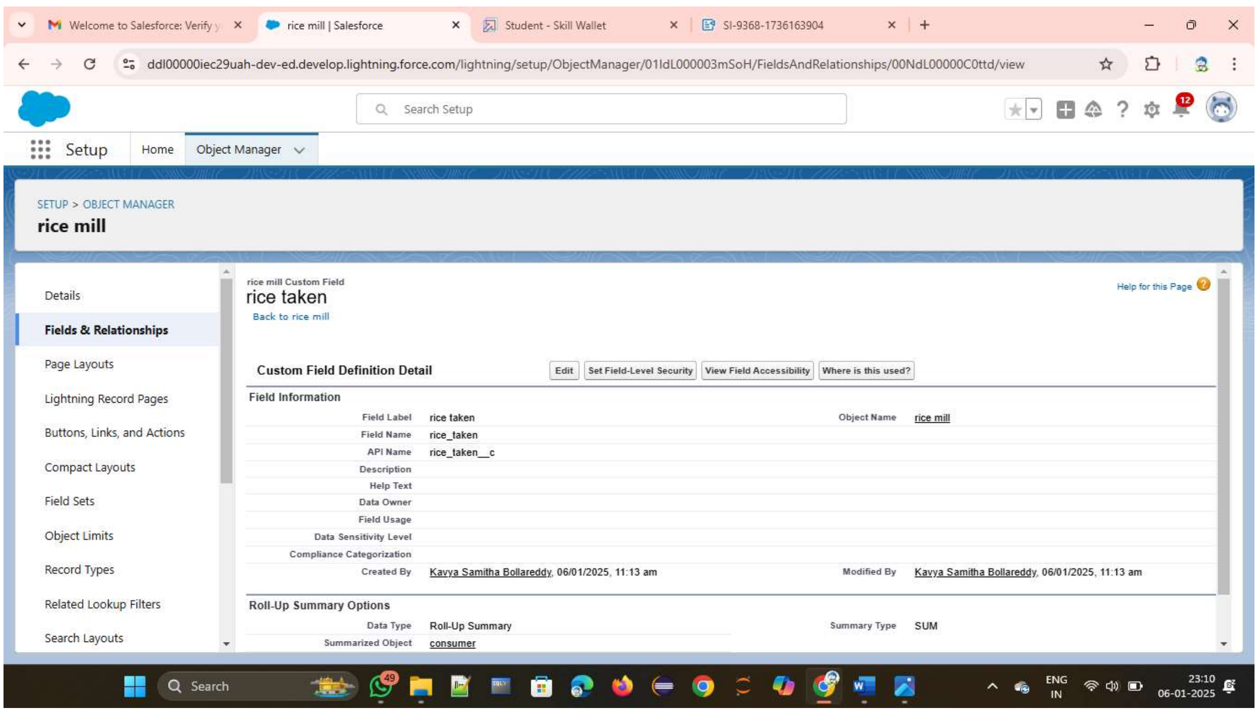
f. Select the roll-up type as SUM.

g. Select the field to aggregate as Rice Taken in Shops.

h. Click Next .

i. Click Next again.

j. Click Save.



Activity 5: Creating Fields in Objects

Creating the number fieldin the Rice Details object.

Navigate to Setup:

a. Go to the setup page.

b. Click on "Object Manager" from the top navigation menu.

Edit Rice Details Object:

c. In Object Manager,find and select"Rice Details" from thelist of objects.

d. Click on "Fields & Relationships."

Create New Field:

e. Click on the "New" buttonto create a new field.

Select Data Type:

f. Choose "Number" as thedata type for the field.

g. Click "Next."

Define Field Properties:

h. Enter "Supplier Name" as the Field Label.

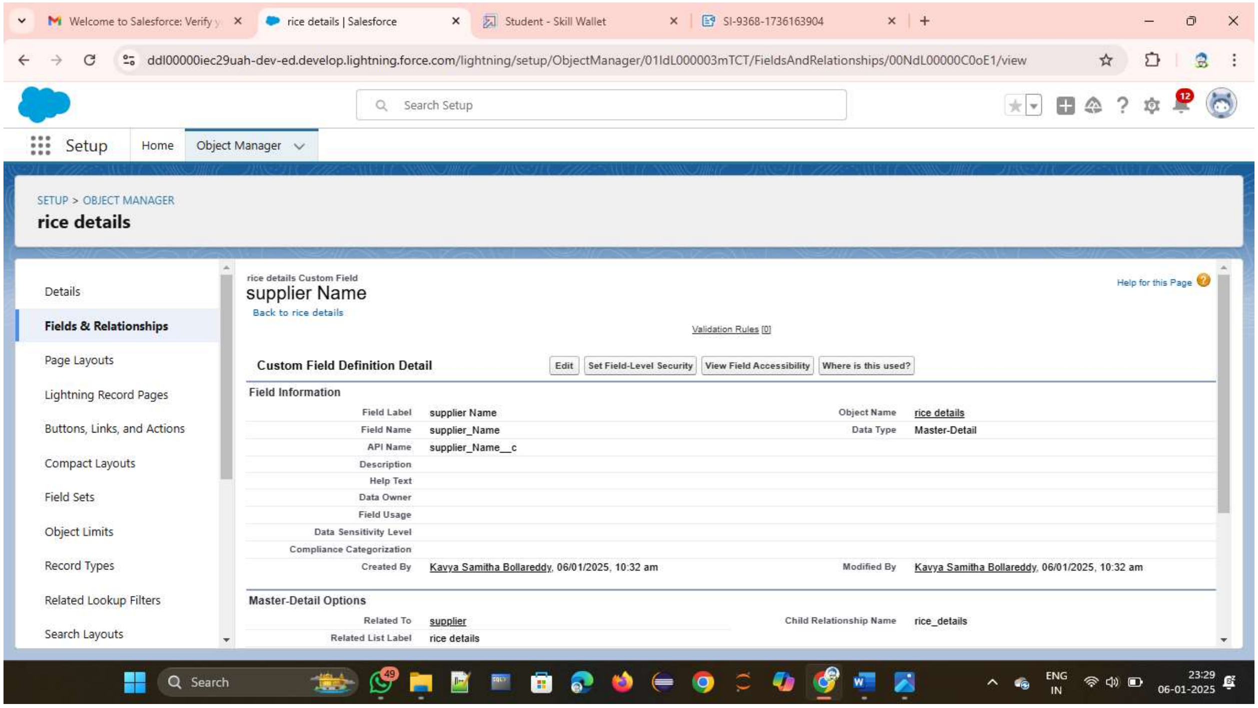
i. Set the length to "5" (assuming this refers to the precision or size of thenumber).

j. Field Name will be automatically populated based on the label.

Proceed with Creation:

k. Click "Next" to proceed throughany additional screens.

l. Review the field detailsand click "Save" to create the new field.



Activity 6: Creating Fields in Rice Mill Objects

Navigate to Setup:

a. Go to the setup page.

b. Click on "Object Manager" from the top navigation menu.

Edit Rice Mills Object:

c. In Object Manager,find and select"Rice Mills" from thelist of objects.

d. Click on "Fields & Relationships."

Create New Field:

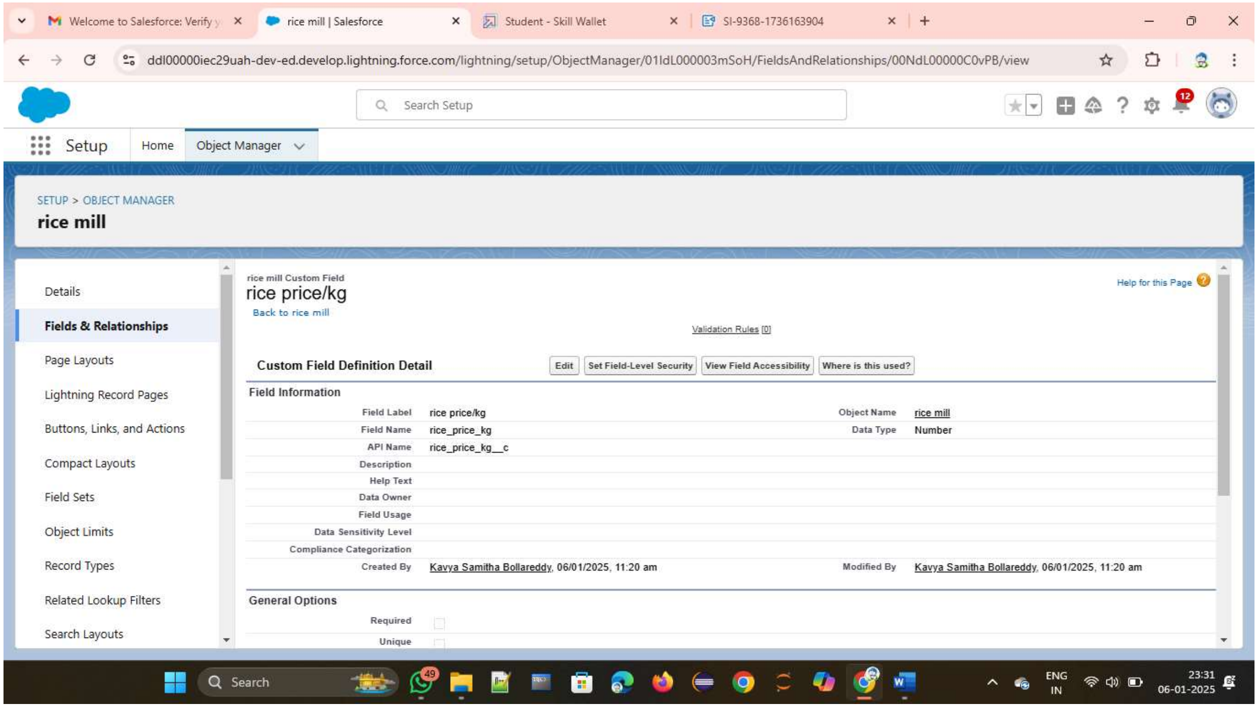
e. Click on the "New" buttonto create a new field.

Select Data Type:

f. Choose "Number" as thedata type for the field.

g. Click "Next."

h. Given the Field Label as "Rice Price/kg" and length as "5".



Activity 7: Creating Fields in Consumer Objects

Navigate to Setup:

a. Go to the setup page.

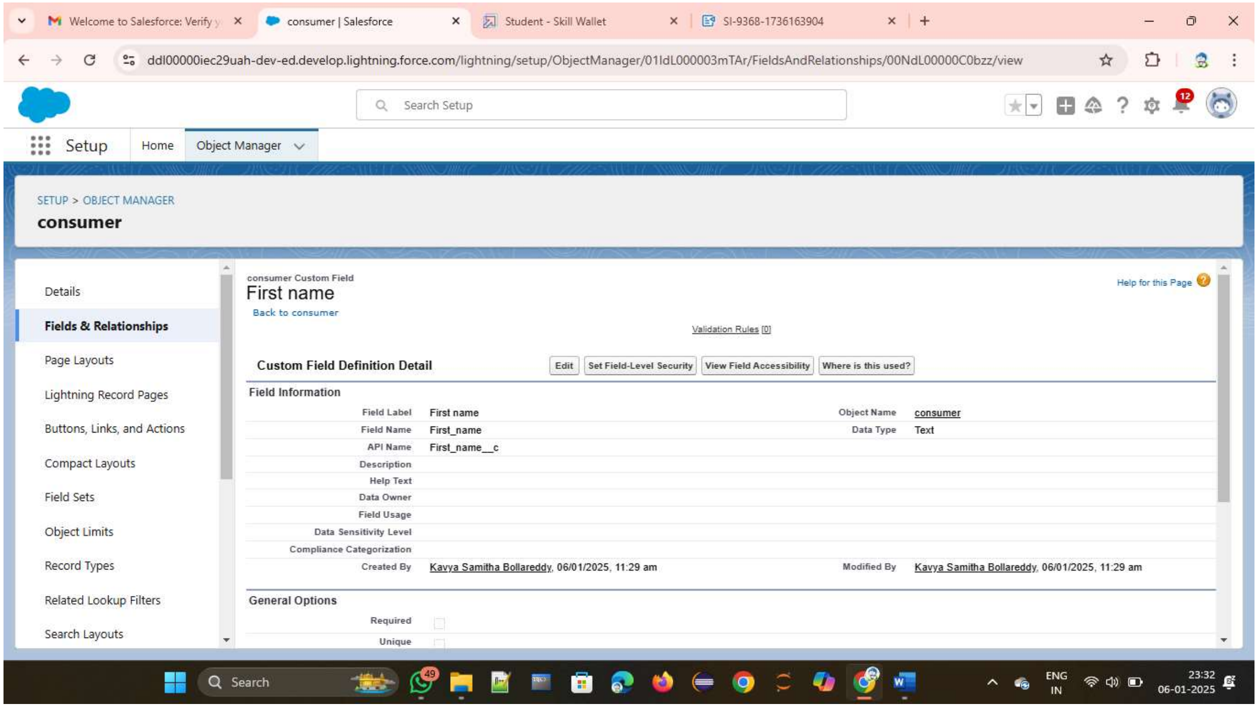
b. Click on "Object Manager" from the top navigation menu.

Edit Consumer Object:

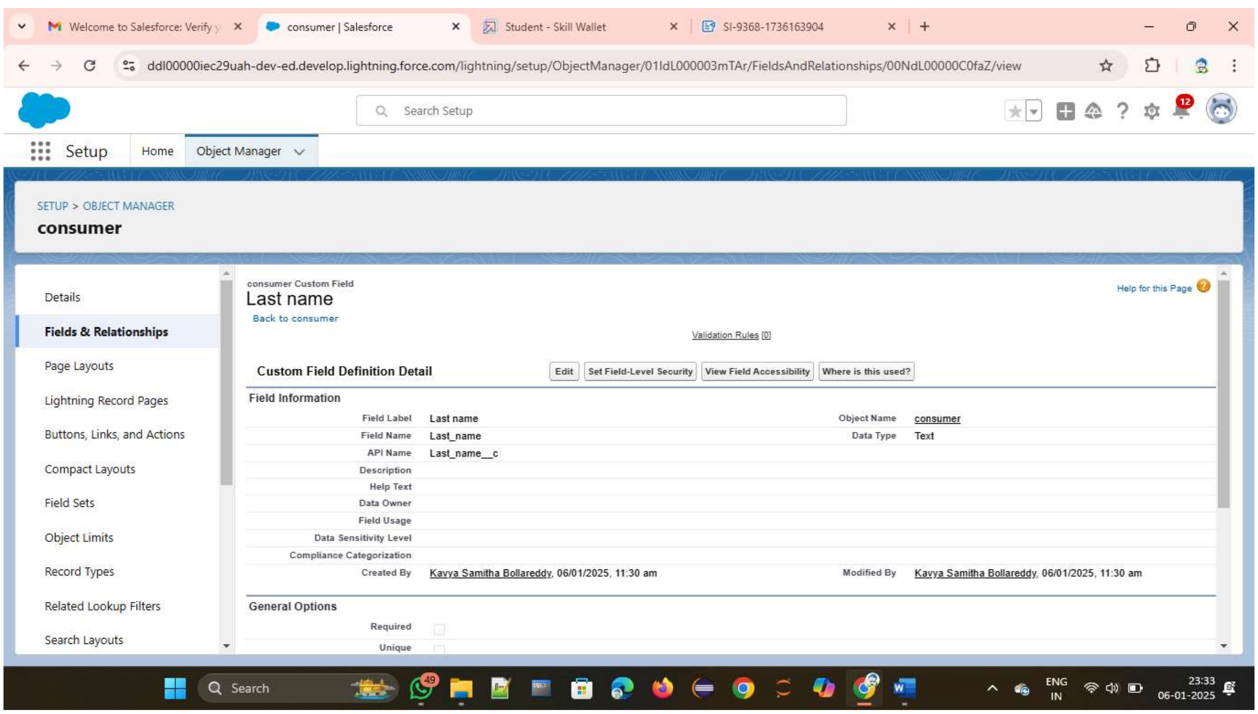
c. In Object Manager,find and select"Consumer" from the list of objects.

d. Click on "Fields & Relationships."

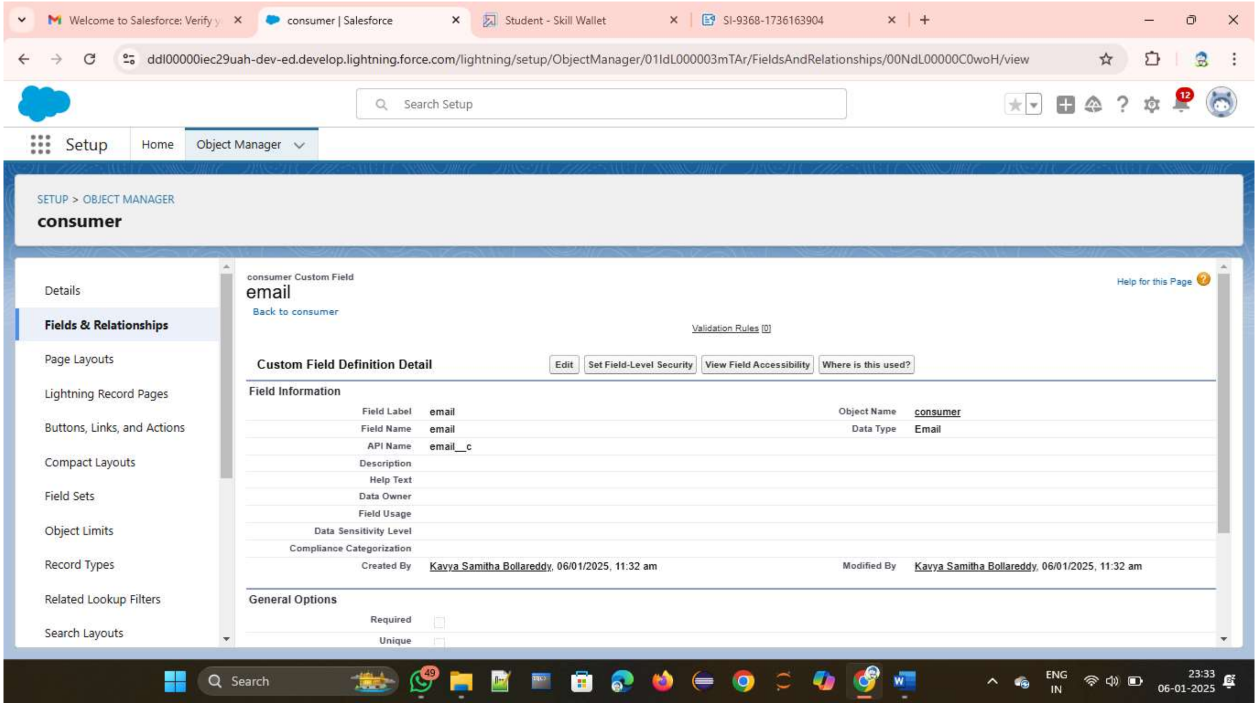
Create New Field For First Name:



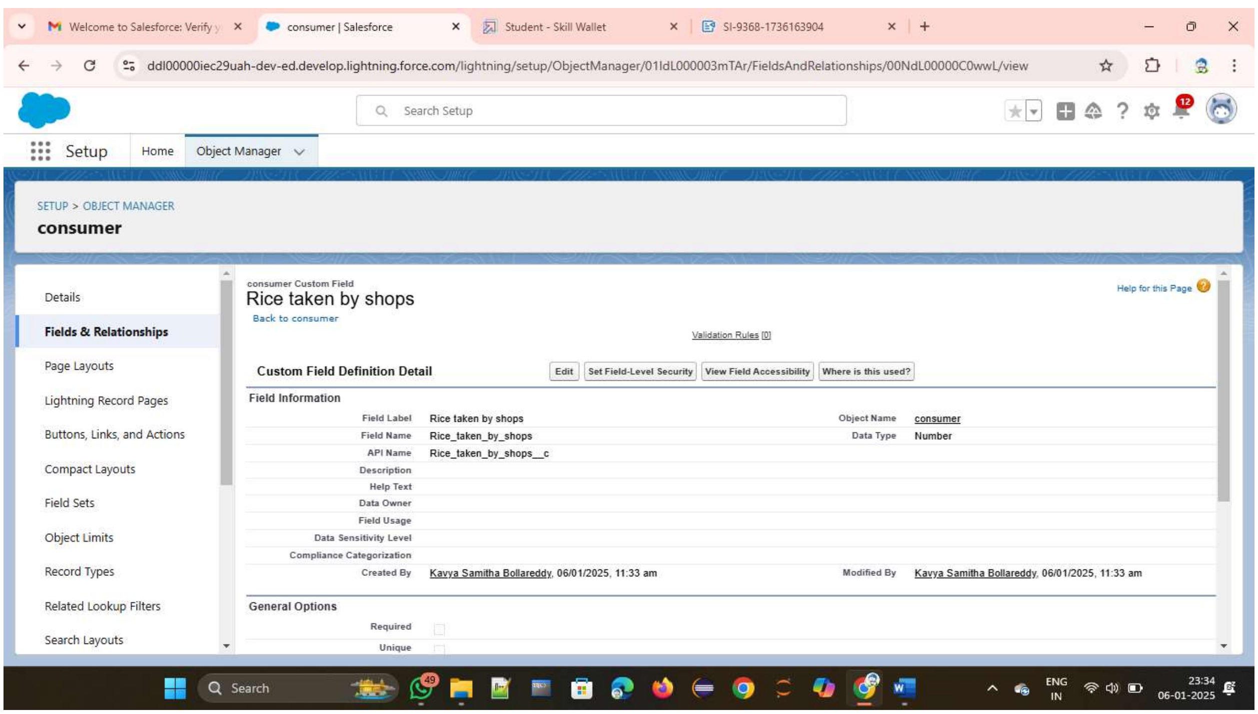
Create New Field For Last Name:



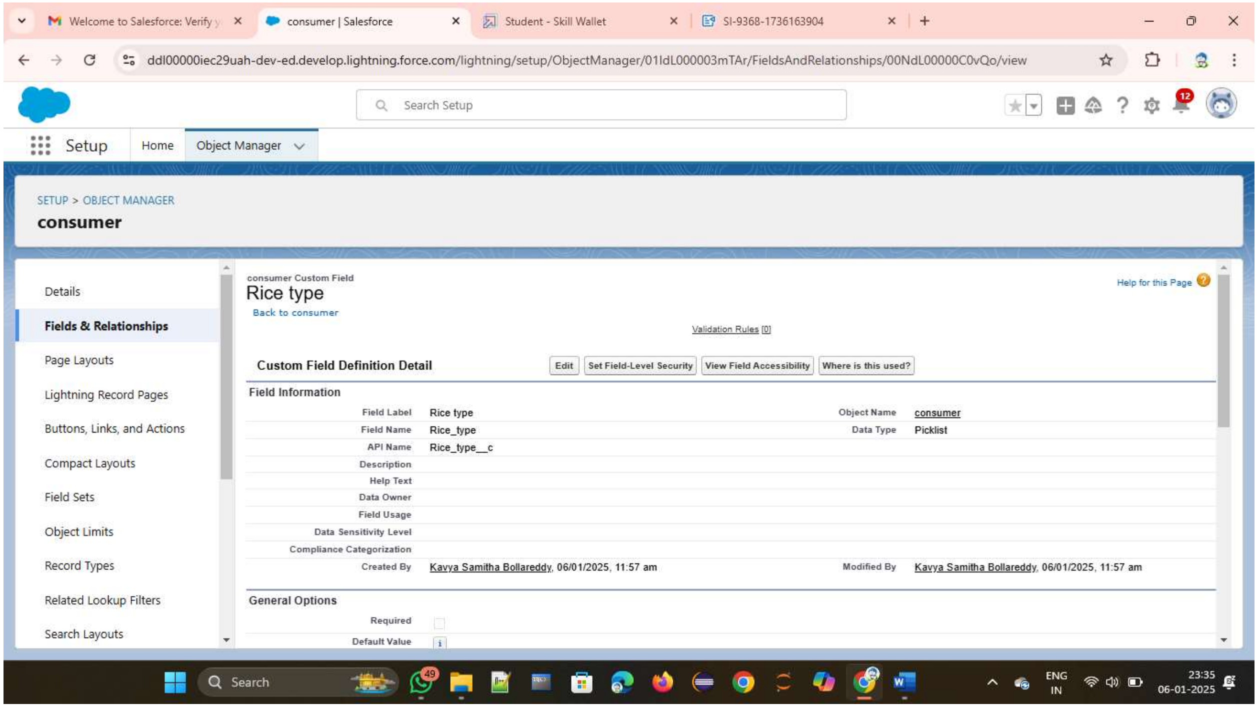
Create New Field For Email :



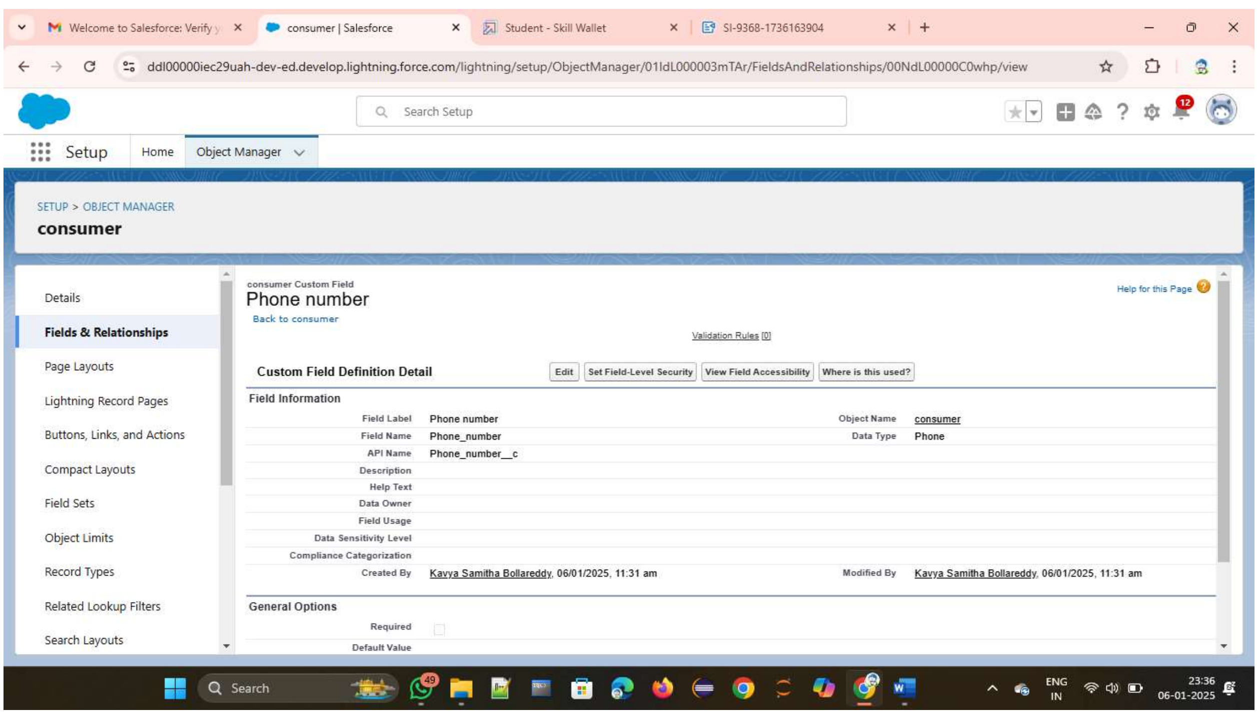
Create New Field For Rice Taken By Shops:



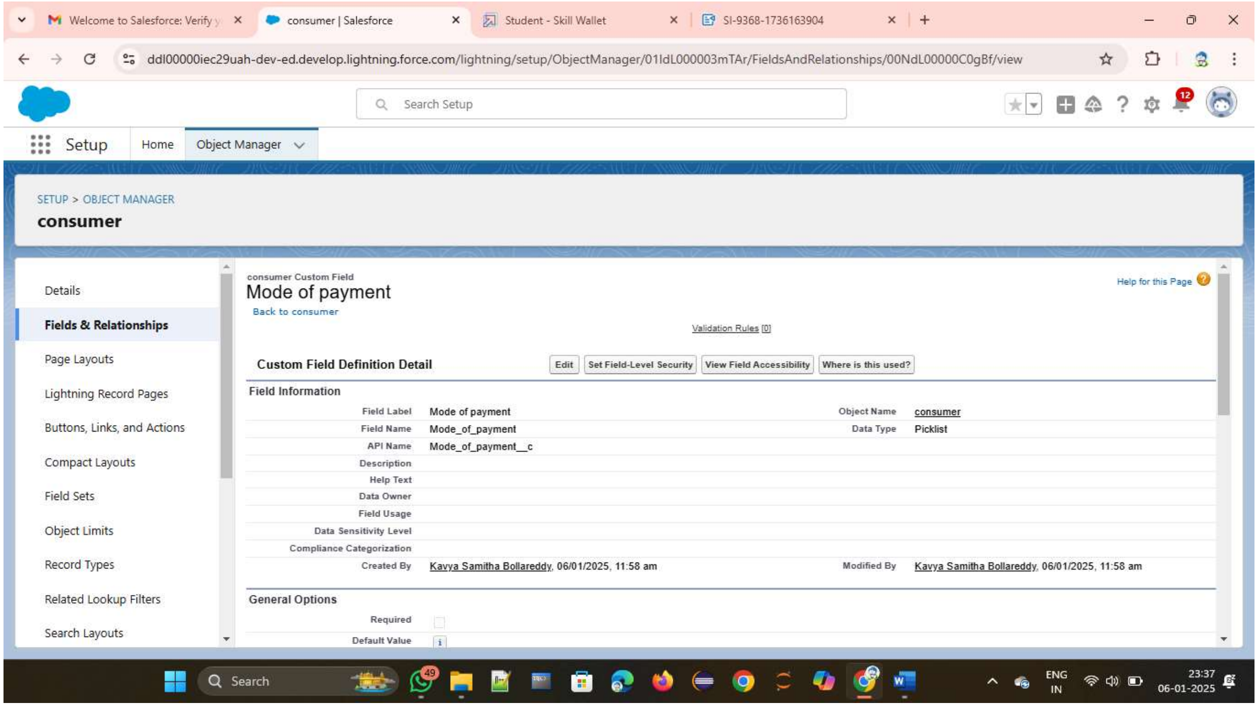
Create New Field For Rice Type:



Create New Field For Phone Number:



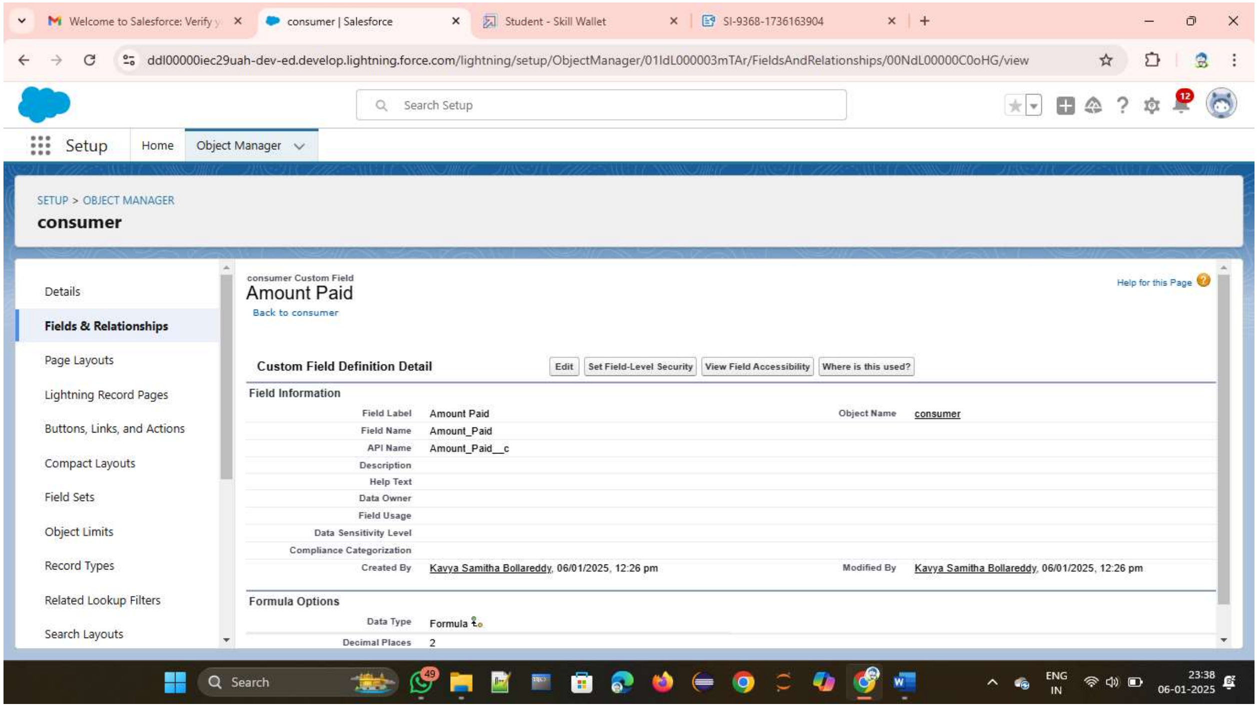
Create New Field For Mode Of Payment:



Activity 8: Creating Cross Object Formula Field in Consumer Object

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

a. Goto setup → click on Object Manager→ type object name (consumer) in the searchbar Click on Fields & Relationships → click on New.
b. Select Data type as “Formula” and click Next.
c. Give Field Label and Field Name as“Amount Paid” and select formulareturn type as “Number” Formula: rice_taken_by_shops_c * rice_mill_name_r.rice_price_kg_c



a. Give Field Labeland Field Name as “AmountPaid” and selectformula return type as “Number” and Next.

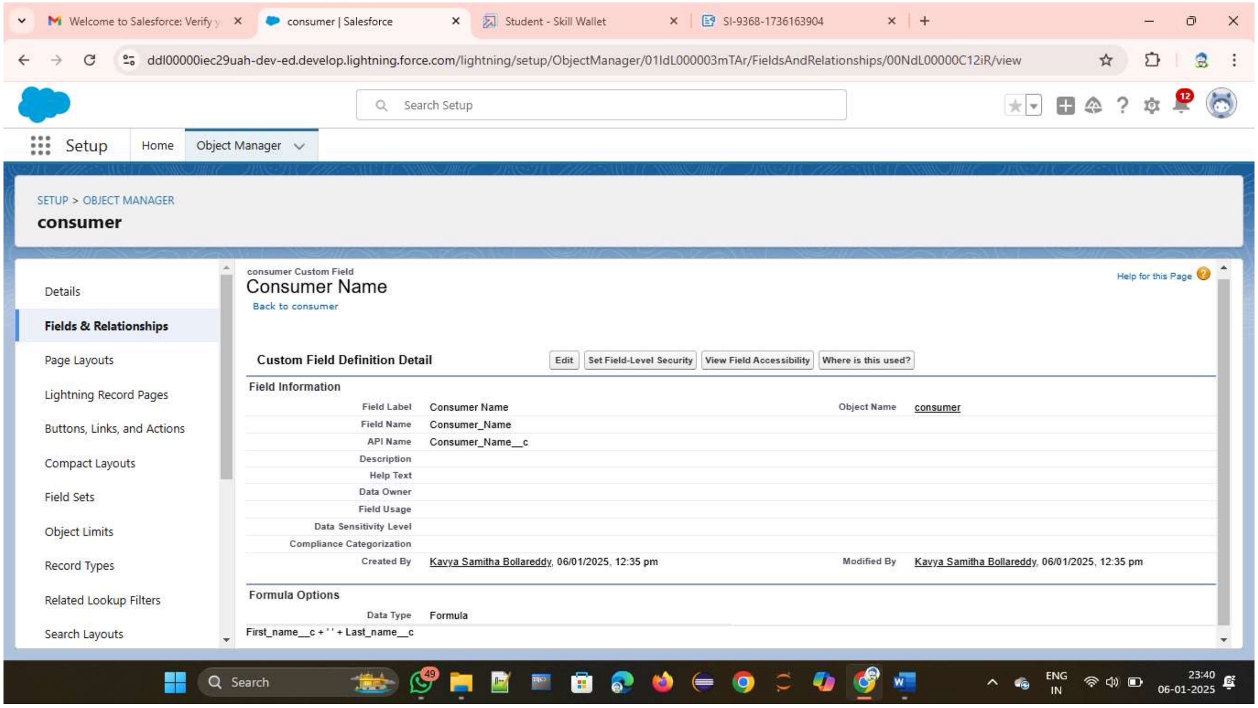
b. Go to setup → click on Object Manager→ type object name (consumer) in the searchbar

c. Click on Fields & Relationships → click on New.

d. Select Data type as “Formula” , click Next.

e. Give FieldLabel and Field Name as “Consumer Name” and selectformula return type as “TEXT”, click Next.

f. Insert field formulashould be: First_Name__c + ' ' + Last_Name__c , Check For syntax.

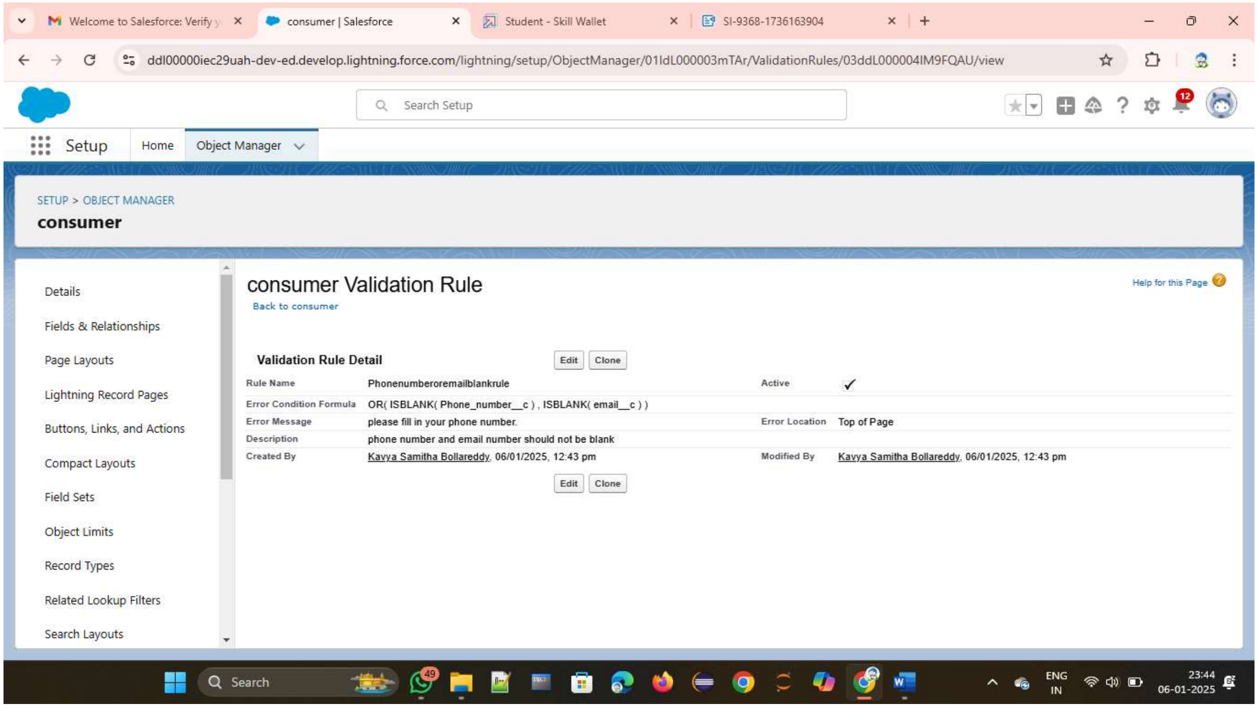


Activity 9: Creating the Validation Rule

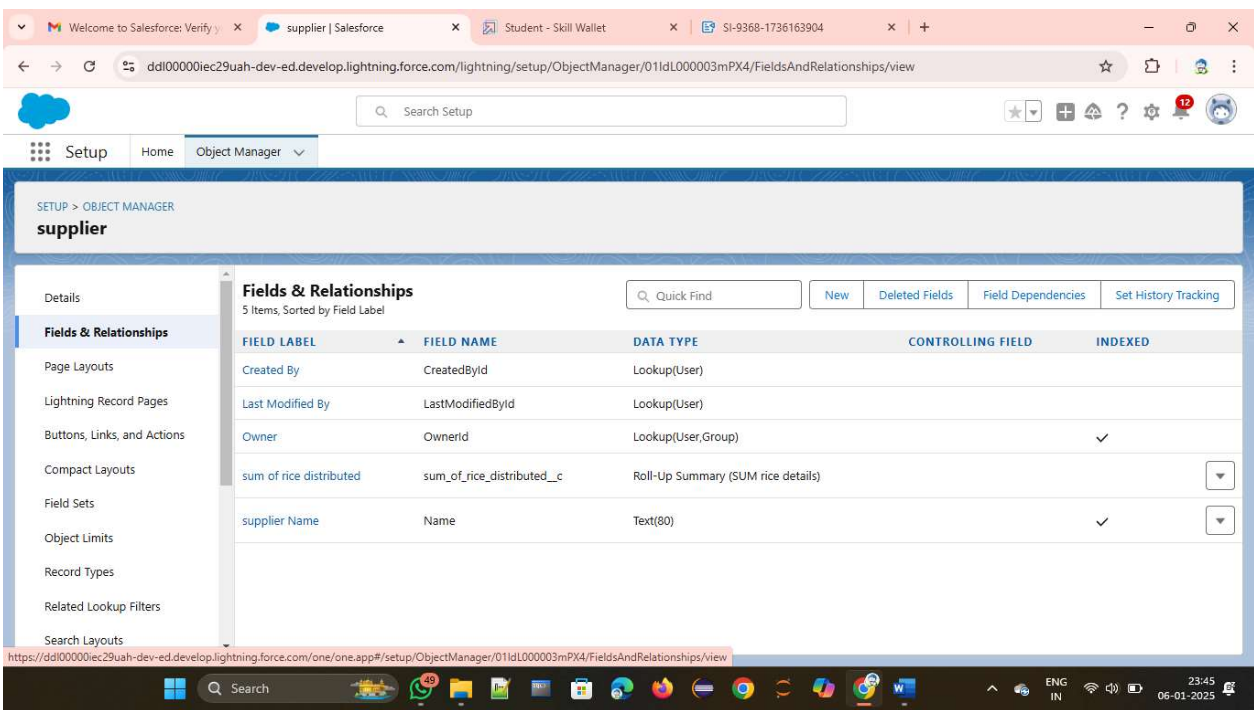
Improve the quality of your data using validation rules. Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns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

Creating the ValidationRule for Phone Number Field in Consumer Object

i. Go to the setup page → click on Object Manager→ from the dropdown click edit for theconsumer object.
ii. Click on Validation Rules → click New.
iii. Enter the Rule Name as “Phonenumberoremailblankrule”.
iv. Enter the Description as “Phone number and email should not be blank”.
v. Enter the formula as: OR(ISBLANK(phone_number__c), ISBLANK(email__c)) .
vi. Check the syntax.
vii. Under the Error Message, Write “Please fill in your PhoneNumber”.
viii. Save Validation rule .



Overall SupplierFields

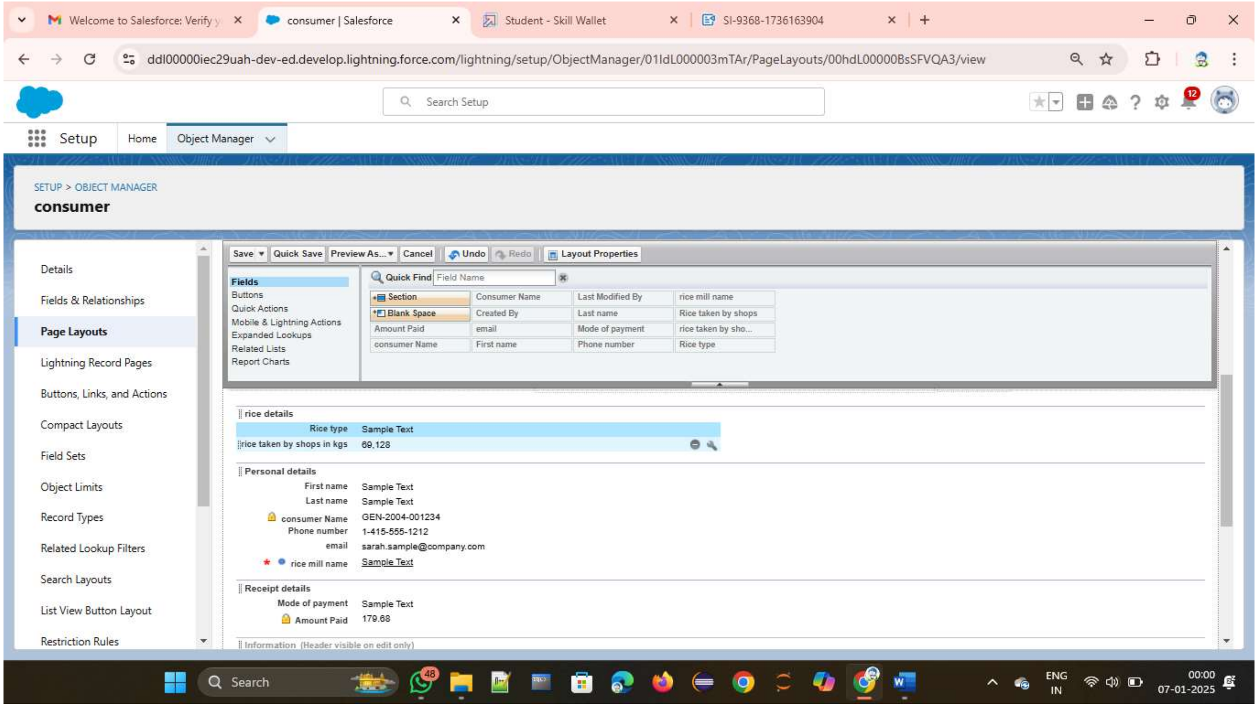


Milestone 6: Page Layouts

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

Activity 1: Creating the Page Layout

a. Go to Setup → Click on Object Manager→ Search for the object(consumer) → From the dropdown select the object and click on it.
b. Click on Page Layout → Clickon New.
c. Select the existing page layout, and give the page layoutname as “consumer layout”,and click Save.
d. Drag and drop the section field to ConsumerDetails and createthe section.
e. Enter the section name as “Personal Details”, → click Ok.
f. Now drag the fields to this sectionthat are mentioned: First Name , Last Name , ConsumerName , etc.
g. Follow the same processfor another two sections as shownabove. They are:
    i. Section: "Rice Details" Fields: Rice Taken by Shop, Rice Type
    ii. Section: "Receipt Details" Fields: Mode of Payment,Amount Paid
h. Click Save.



Milestone 7: Profiles

A profile is a group/collection of settings and permissions that define what a user can do in Salesforce. Profiles control object permissions, field permissions, user permissions, tab settings, app settings, Apex class access, Visualforce page access, page layouts, recordtypes, login hours,and login IP ranges. You can defineprofiles 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 the following standardprofiles:

a. Contract Manager
b. Read Only
c. Marketing User
d. Solutions Manager
e. Standard User
f. System Administrator

2. Custom Profiles

Custom profilesare defined by us.They can be deleted if there are no users assigned with that particular profile.

Activity 1: Owner Profile

To create a new profile:

a. Go to Setup → type "Profiles" in the quick find box → click on Profiles→ clone the desired profile (Standard User) → enter profile name (Owner) → Save.
b. Scroll down to CustomObject Permissions and give accesspermissions for consumers, rice details, rice mill, and suppliers objects as mentioned in the below diagram.
c. Give access and save it.

Activity 2: Employer Profile

To create a new profile:

a. Go to Setup → type "Profiles" in the quick find box → click on Profiles → clone the desired profile (Standard Platform User) → enter profile name (Employer) → Save.
b. While still on the profile page, click Edit.
c. Select the Custom App settings as default for the rice mill.
d. Scroll down to CustomObject Permissions and give accesspermissions for consumer,rice details, rice mill, and suppliers objects as mentioned in the below diagram. Click Save.

Activity 3: Workers Profile

To create a new profile:

a. Go to Setup → type "Profiles" in the quick find box → click on Profiles → clone the desired profile (Standard Platform User) → enter profile name (Workers) → Save.
b. While still on the profile page, click Edit.
c. Select the Custom App settings as default for the rice mill.
d. Scroll down to CustomObject Permissions and give accesspermissions for consumer,rice details, rice mill, and suppliers objects as mentioned in the below diagram. Click Save.

Milestone 8: Role & Role Hierarchy

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

Activity 1: Creating Owner Role

Creating Owner Role:

a. Go to Quick Find → search for Roles → click on Set Up Roles.

b. Click on Expand All and click on Add Role under whom this role works.

c. Give Label as “Owner”and Role Name gets auto-populated. Then click on Save.

d. Click and save it.

Activity 2: Creating Employer Roles

Creating Another Two Roles Under Manager:

e. Go to Quick Find → search for Roles → click on Set Up Roles.

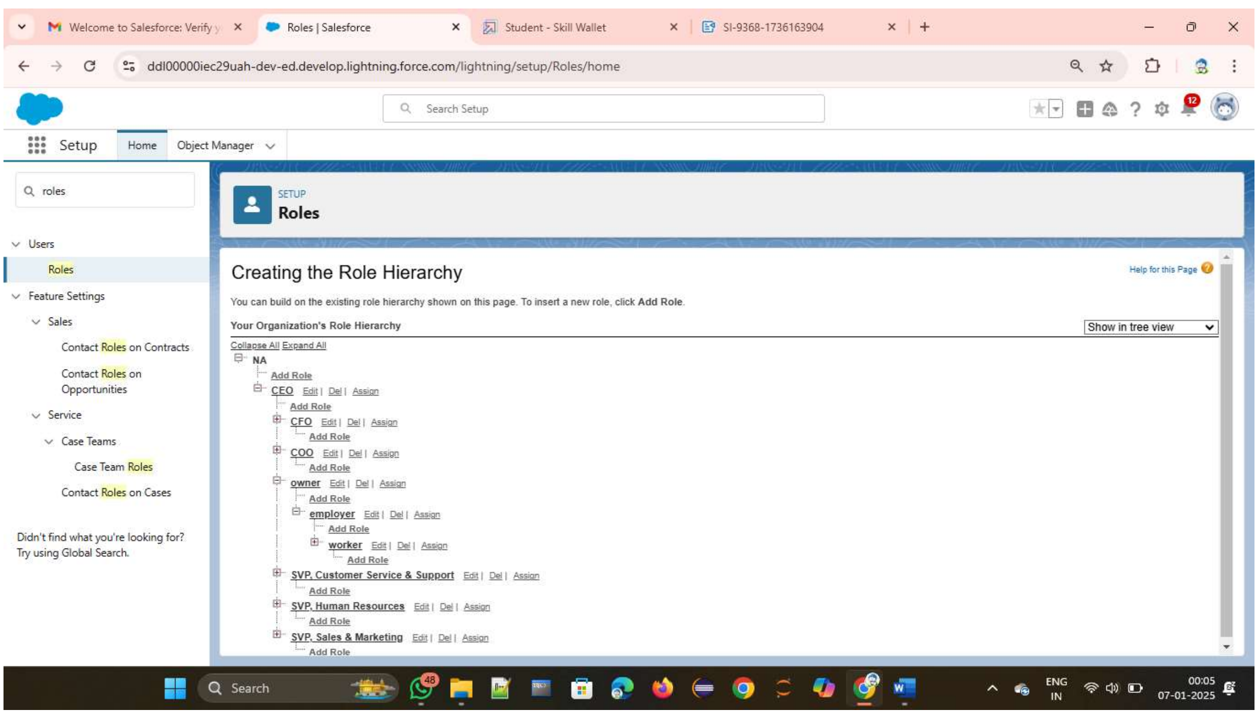
f. Click the plus on CEOrole, and clickAdd Role under Owner.

g. Give Label as“Employer” and Role Name gets auto-populated. Then click on Save.

h. Repeat the same steps for another role.

i. Click the plus on CEO role, and clickthe plus on Owner, and click Add Role under Employer.

j. Give Label as “Worker”and Role Name getsauto-populated. Then click on Save.

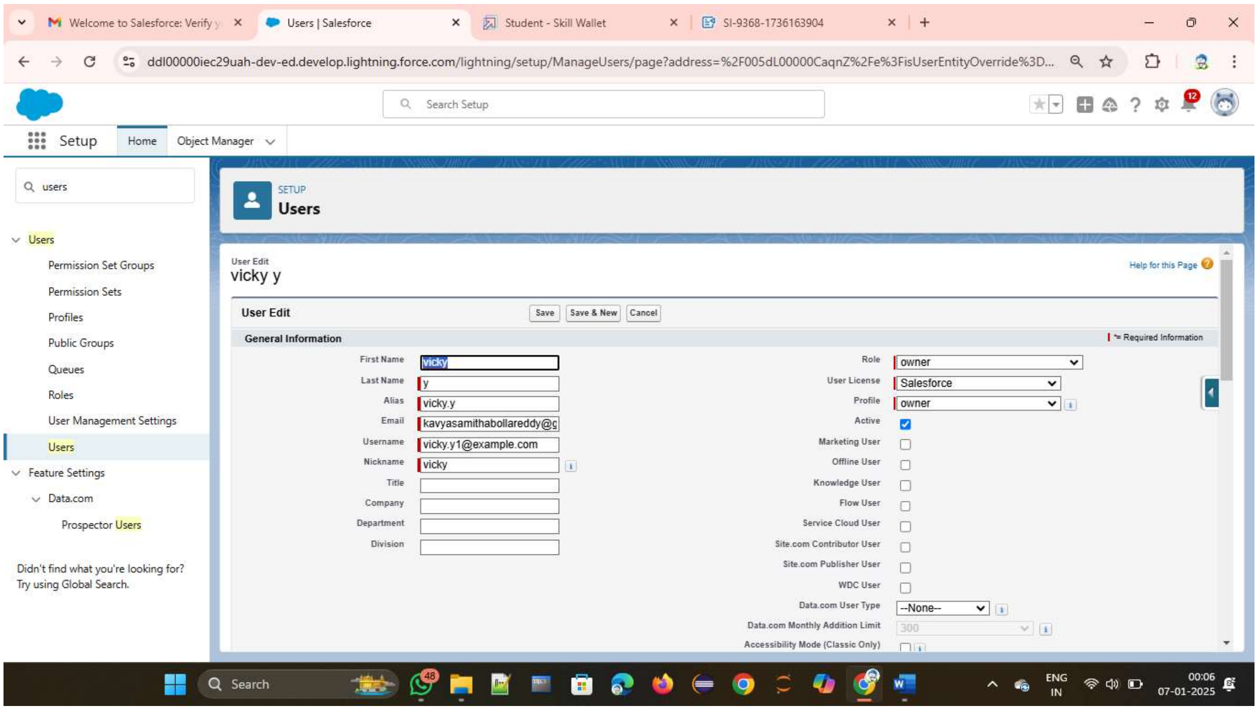


Milestone 9: Users

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

Activity 1: Create User

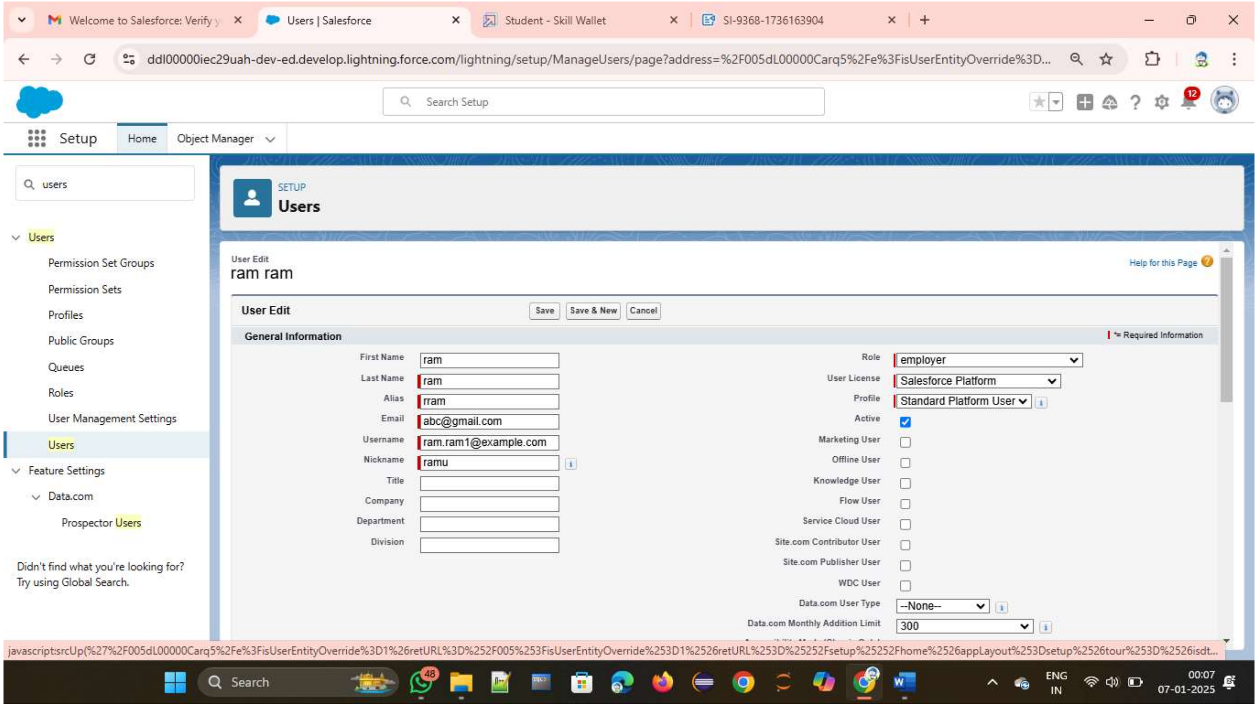
i. Go to Setup → type "Users" in thequick find box → selectUsers → click New User.



Activity 2: Creating Another Users

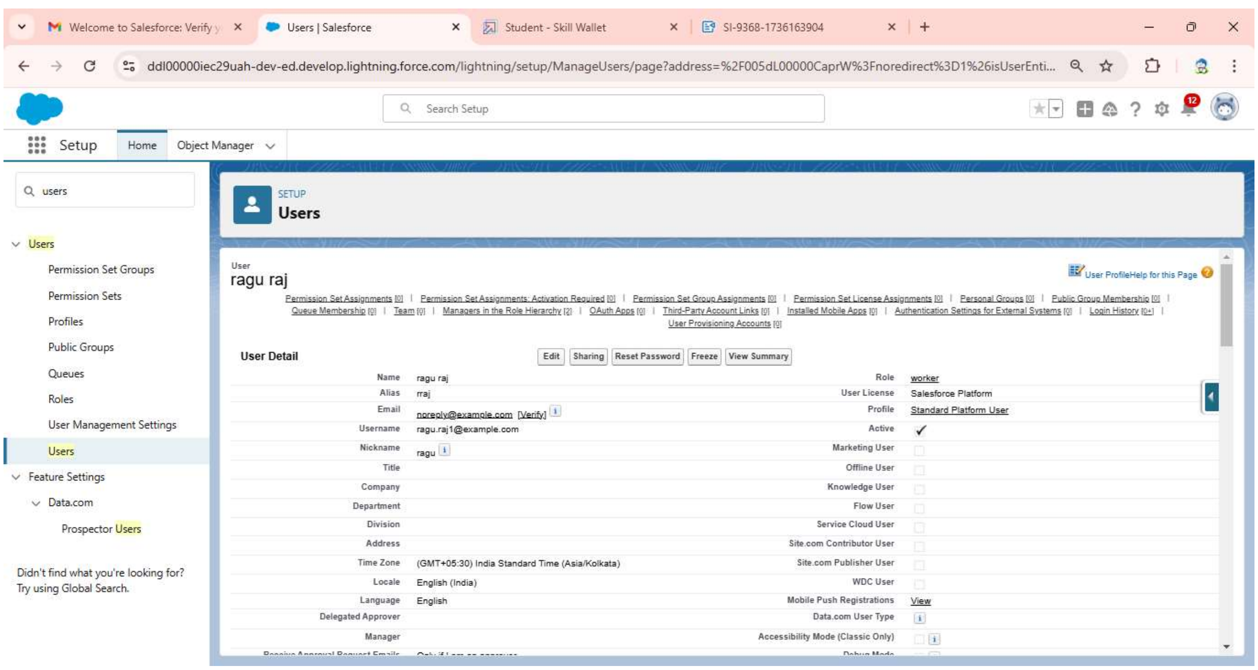
a. Go to Setup → type "Users" in thequick find box → selectUsers → click New User.

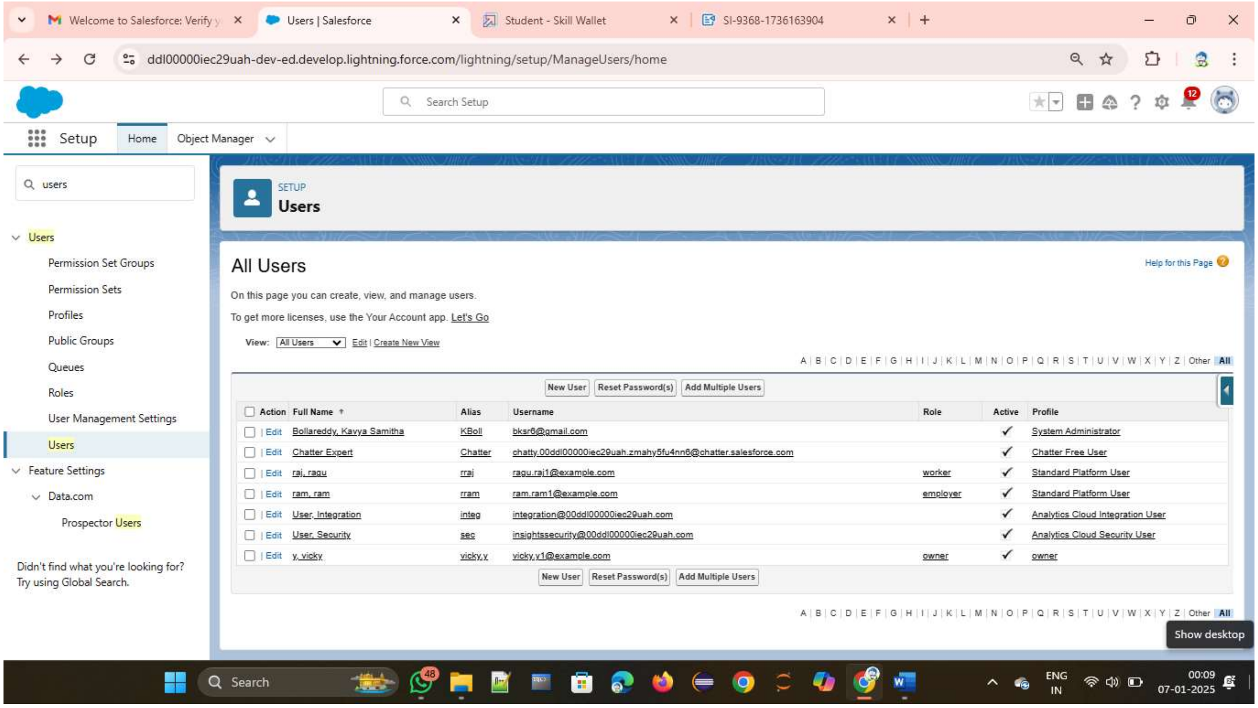
b. Fill in the fields:



a. Go to Setup → type "Users" in thequick find box → selectUsers → click New User.

b. Fill in the fields:





Milestone 10: Permission Sets

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

Activity 1: Creating OWD Setting

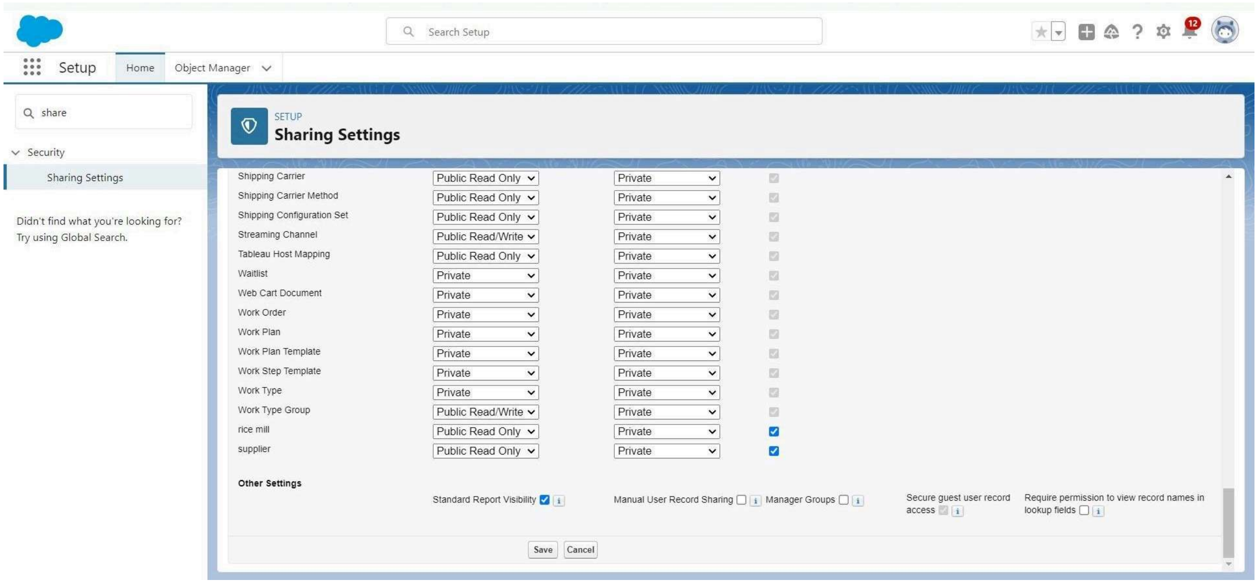
a. Go to Setup → type "Sharing Settings" in quick search →Click Edit.

b. Scroll down, change the default internal access to "Public Read-Only" for Rice Mill and Supplier objects.

c. Click Save.

ExtraInformation:

By setting the Organization-Wide Defaults (OWD) to "Public Read-Only," every profile has its own access according to their profile.In our case, roles are createdand assigned so that the owner can see employerand worker records, and the employer can see worker records.



Milestone 11: Reports

a. Go to the app → click on the Reports tab.

b. Click New Report.

c. Select for Report Type, search for “Rice Mill with Consumers”, click on it, and click Start Report.

d. The outlinepane is opened already, selectthe fields that are mentionedbelow in the Column section:

   i. Consumer Name

   ii. Rice Type

   iii. Rice Price/kg

   iv. Mode of Payment

   v. Amount Paid

e. Remove the unnecessary fields.

f. Select the field that ismentioned below in the Group Rows section:

   i. Rice Taken by Shops

g. Click Save andRun .

h. Save the report as “Rangeof Amount per Day”.

i. Save it.

Activity 2: Sharing Report to Owner

a. Click on thereport to open it.

b. Click the Edit dropdown menu and select the Subscribe option.

c. After selectingto run the report as "Another Person," select your personalaccount or the person you want to send the email to.

d. Click Save.

e. Note: The owner gets a daily email notification of the Rice Mill reportso that they can see all data remotely.

Activity 3: Create a Report Folder

Steps to Create a Report Folder:

i. Click on the App Launcher and search for "Reports".

ii. Double-click on "Reports". The "Reports tab" will be auto-populated in the navigation bar.

iii. Click on the "Reports" tab, then click on New Folder.

iv. Give the Folder Label as“Estimated Rice per Day”. The Folder Unique Name will be auto-populated.

v. Click Save.

Moving a Reportto the New Folder:

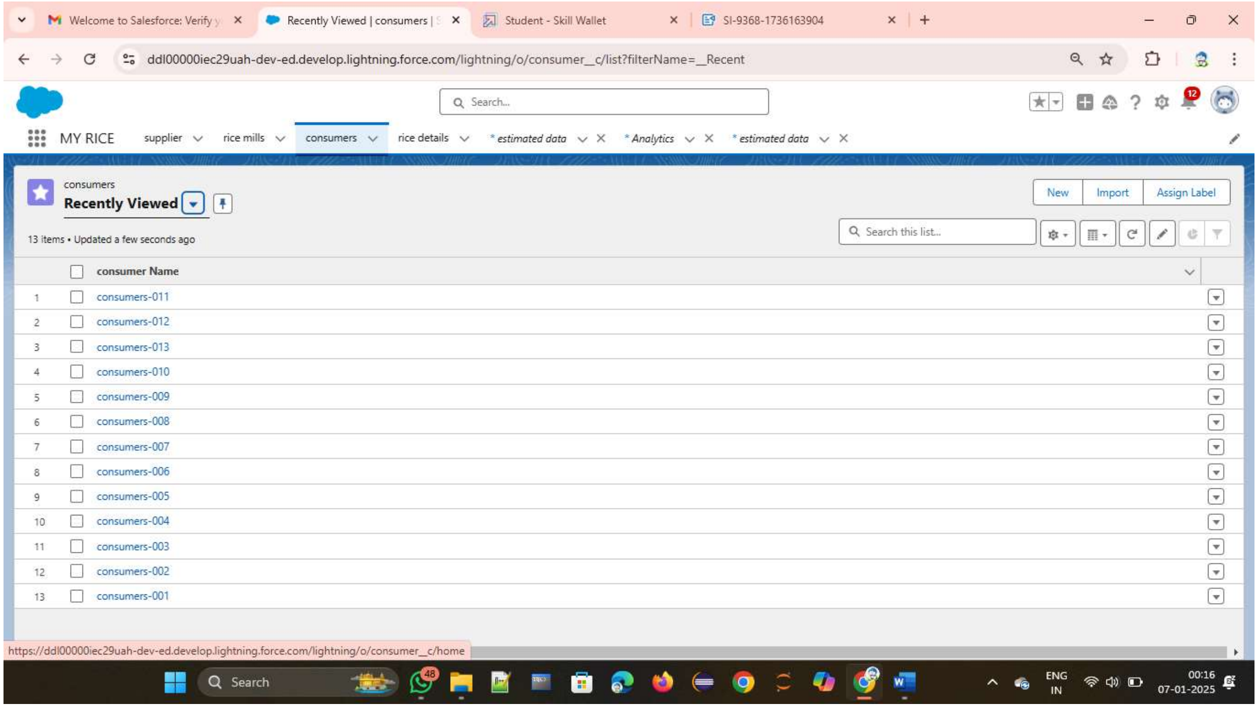
vi. Navigate to the App Launcher and click on Reports.

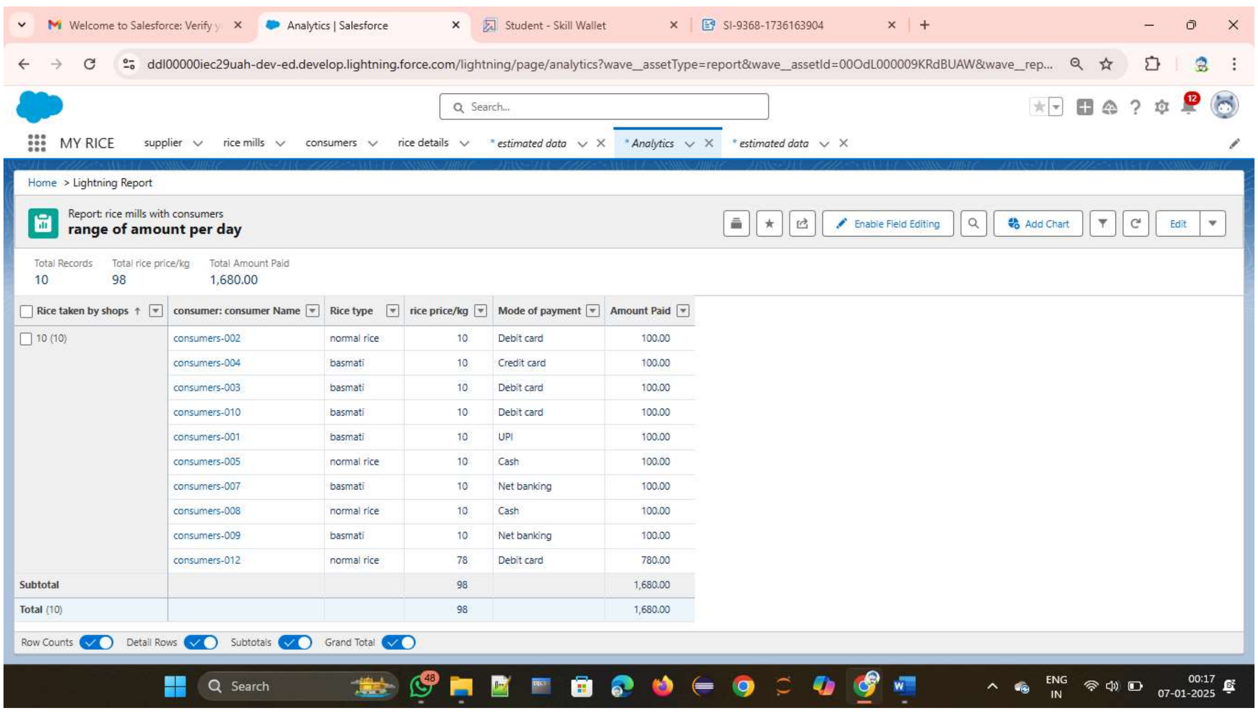
vii. Click All Reports.

viii. Select the "Range of Amount per Day" report from thedropdown menu.

ix. Click Move.

x. Select the "Estimated Rice per Day" folder and click Select.





Milestone 12: Dashboards

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

Activity 1: Create Dashboard Folder

Steps to Create a Dashboard Folder:

i. Click on the App Launcher and search for "Dashboard".

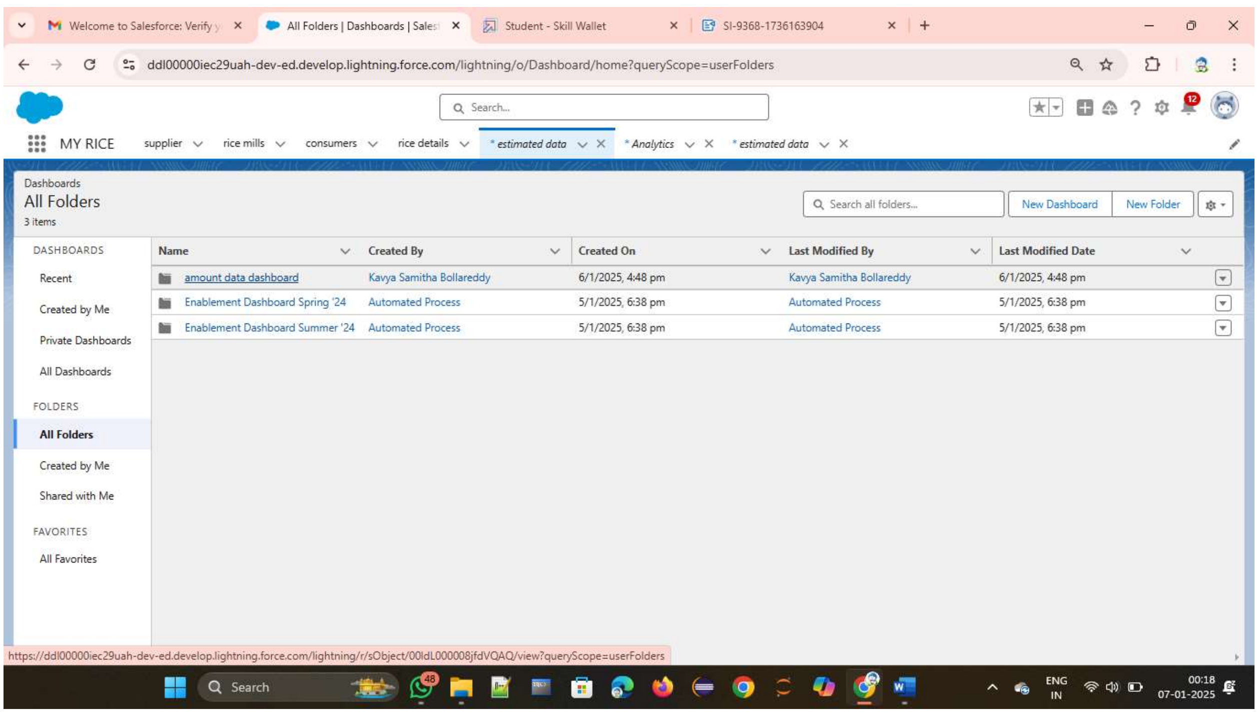
ii. Click on the Dashboardtab.

iii. Click New Folder.

iv. Give the Folder Label as “Amount Data Dashboard”.

v. Folder UniqueName will be auto-populated.

vi. Click Save.



Activity 2: Create Dashboard

i. Go to the App → click on the Dashboards tab.
ii. Give a Name and select the folder that was created, and click Create.
iii. Select Add Component.
iv. Select a Report and click Select.

First ComponentDetails:

v. Display as: Vertical Bar Chart

vi. X-axis: Rice Taken by Shops
vii. Y-axis: Sum of Amount
viii. Y-axis Range: Automatic
ix. Sort by: Rice Taken by Shops
x. Component Theme: Dark

SecondComponent Details:

xi. Select Add Component with the same steps as above.

xii. Display as: Donut Chart

xiii. Sort by: Sum of Amount
xiv. Title: Range of Amount per Day
xv. Component Theme: Dark