

A CRM APPLICATION FOR WHOLESALE RICE MILL

By

Gadusu Laxmanasai

laxmansai06@gmail.com

Project Abstract

Introduction:

This project involves the development of a CRM application on the Salesforce platform tailored for wholesale rice mills. The application aims to enhance operational efficiency, improve data accuracy, and support strategic decision making by integrating consumer management, inventory tracking, sales processing, and financial reporting into a single platform.

Objective:

To provide a centralized and user-friendly CRM system that streamlines core business processes, enhances customer relationship management, optimizes inventory levels, ensures accurate sales tracking, and facilitates comprehensive financial reporting.

Key Features:

1. Consumer Management:

- Detailed consumer profiles with fields like name, contact details, rice taken, and payment methods.

2. Rice Inventory Management:

- Track rice types, quantities, prices, and supplier information.

3. Sales Tracking:

- Record sales transactions including consumer details, rice types, quantities, and total amounts.

4. Payment Processing:

- Record payments with details such as amount paid, payment date, and mode of payment.

5. Reporting and Analytics:

- Generate detailed reports and dashboards on consumers, sales, payments, and inventory.

Conclusion:

The CRM application for wholesale rice mills harnesses Salesforce's capabilities to transform traditional operations. By integrating key business functions into a cohesive system, it enables rice mill businesses to operate efficiently, make informed decisions, and achieve sustainable

INDEX PAGE

Topics

pageno

Introduction To Salesforce :

- | | |
|-------------------------------|-------|
| 1. Creating Developer Account | 05 |
| 2. Account Activation | 06-07 |

Object :

- | | |
|--------------------------------|----|
| 3. Create Supplier Object | 08 |
| 4. Create Rice Mill Object | 09 |
| 5. Create Consumer Objects | 10 |
| 6. Create Rice Details Objects | 11 |

Tabs :

- | | |
|----------------------------|-------|
| 7. Creating A Custom Tab | 12-13 |
| 8. Creating Remaining Tabs | 14 |

The Lightning App :

- | | |
|---------------------------|-------|
| 9. Create A Lightning App | 15-17 |
|---------------------------|-------|

Fields :

- | | |
|---|-------|
| 10.Creating The Number Field In Rice Details Object | 18-19 |
| 11. Creating Junction Object | 20-21 |
| 12.Creating A Master-Detail Relationship | 22 |
| 13.Creating The Roll-Up Summary | 23-24 |
| 14.Creating Fields In Objects | 25-26 |
| 15.Creating Fields In Rice Mill Objects | 27 |
| 16.Creating Fields in Consumer Objects | 28-29 |
| 17.Creating Cross Object Formula Field In Consumer Object | 30-31 |
| 18.Creating The Validation Rule | 32-33 |

Page Layouts :

- | | |
|-----------------------------|-------|
| 19.Creating The Page Layout | 34-35 |
|-----------------------------|-------|

Profiles :

- | | |
|---------------------|----|
| 20.Owner Profile | 36 |
| 21.Employer Profile | 37 |
| 22.Worker Profile | 38 |

Role & Role Hierarchy :

- | | |
|----------------------------|-------|
| 23.Creating Owner Role | 39-40 |
| 24.Creating Employer Roles | 41-42 |

Users :	
25.Create User	43
26.Creating Another Users	44
27.Create Another User	45
Permission Sets :	
28.Creating OWD Setting	46
Report :	
29.Create Report	47-48
30.Sharing Report To Owner	49
31.Create a Report Folder	50-51
Dashboards :	
32.Create Dashboard Folder	52
33.Create Dashboard	53-55
APEX :	
34.Create An Apex Class (ConsumerRecord)	56-57
35.Creating An Apex Trigger	58

INTRODUCTION

In today's competitive landscape, wholesale rice mills must navigate complex operations and maintain high levels of efficiency to remain successful. Effective management of consumer relationships, inventory, sales, and financial transactions is crucial to achieving this goal. However, traditional methods of managing these processes are often cumbersome, error-prone, and time-consuming.

This project introduces a cutting-edge CRM (Customer Relationship Management) application built on the Salesforce platform, specifically designed to address the unique needs of wholesale rice mills. The application aims to provide a centralized, user-friendly platform that streamlines and automates core business processes, significantly enhancing operational efficiency and data accuracy.

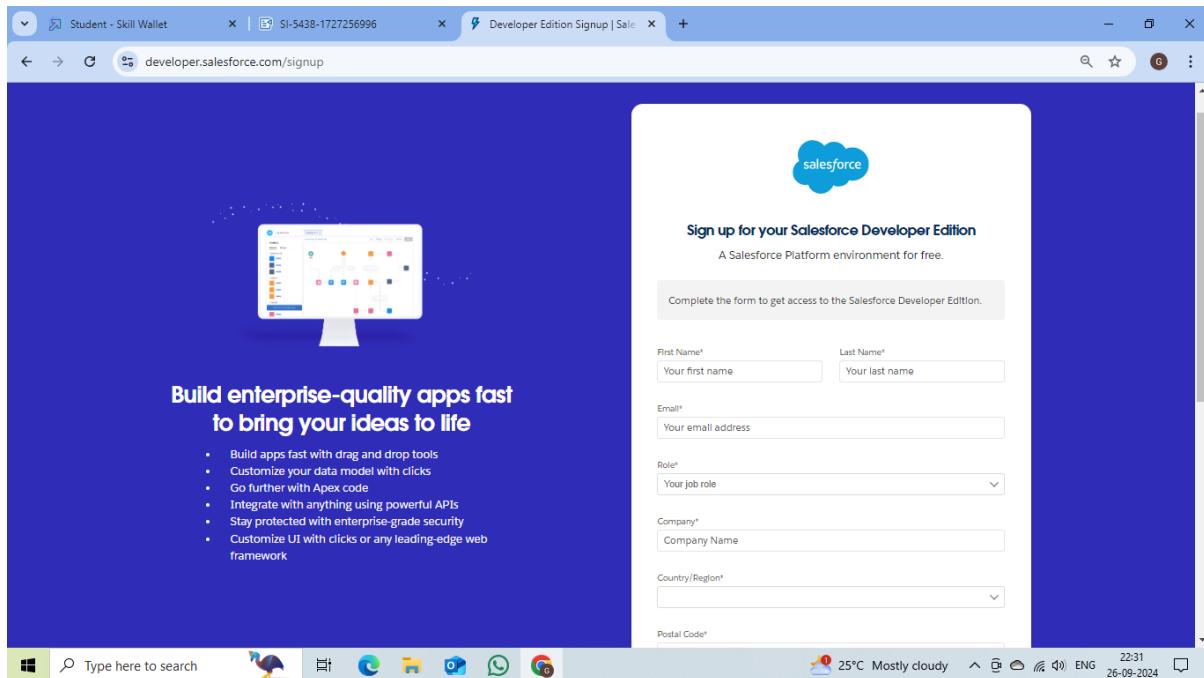
The CRM application focuses on several key areas:

1. Consumer Management: It enables the rice mill to maintain comprehensive profiles for each consumer, capturing essential information such as contact details, rice purchases, payment methods, and more. This facilitates improved customer service and strengthens consumer relationships.
2. Rice Inventory Management: The application provides robust tools for tracking rice inventory, including details on rice types, quantities available, pricing, and supplier information. This ensures optimal stock levels and efficient inventory management, preventing both shortages and overstocking.
3. Sales Tracking: The system meticulously records all sales transactions, linking them to the appropriate consumers and inventory items. This allows for precise sales monitoring, trend analysis, and revenue tracking, offering valuable insights into business performance.
4. Payment Processing: Accurate tracking of payments is crucial for financial health. The application records all payment details, ensuring timely and accurate financial reconciliation and facilitating smooth financial operations.
5. Reporting and Analytics: Comprehensive reporting capabilities allow for the generation of detailed reports and dashboards, covering various aspects of the business. These insights support data-driven decision-making and strategic planning, helping the rice mill to identify opportunities for improvement and growth.

Task 1:

Creating Developer Account

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



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

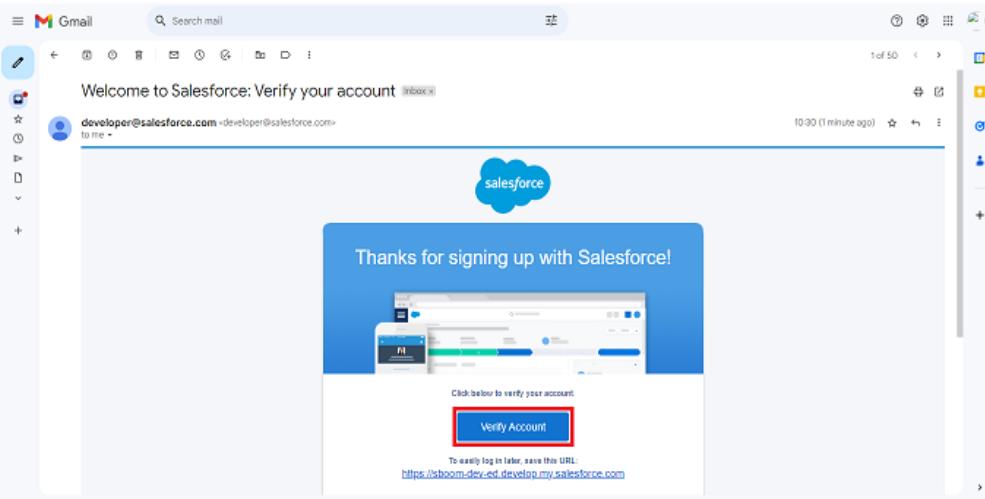
This need not be an actual email id, you can give anything in the format :
username@organization.com

Click on sign me up after filling these.

Task-2

Account Activation

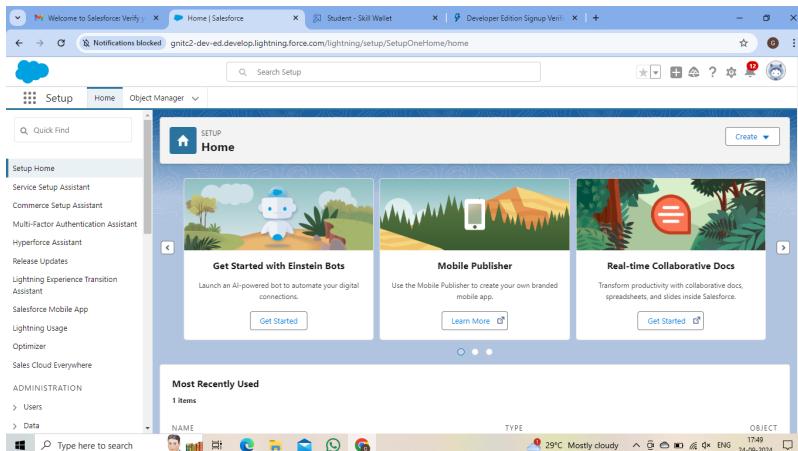
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



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

A screenshot of the 'Change Your Password' page in Salesforce. It shows fields for 'New Password' (containing '.....') and 'Confirm New Password' (containing '.....'), both of which are highlighted with a red box. Below them are 'Security Question' (set to 'In what city were you born?') and 'Answer' (containing 'asdfghijkl'). A large red box highlights the entire form area, including the 'Change Password' button at the bottom.

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

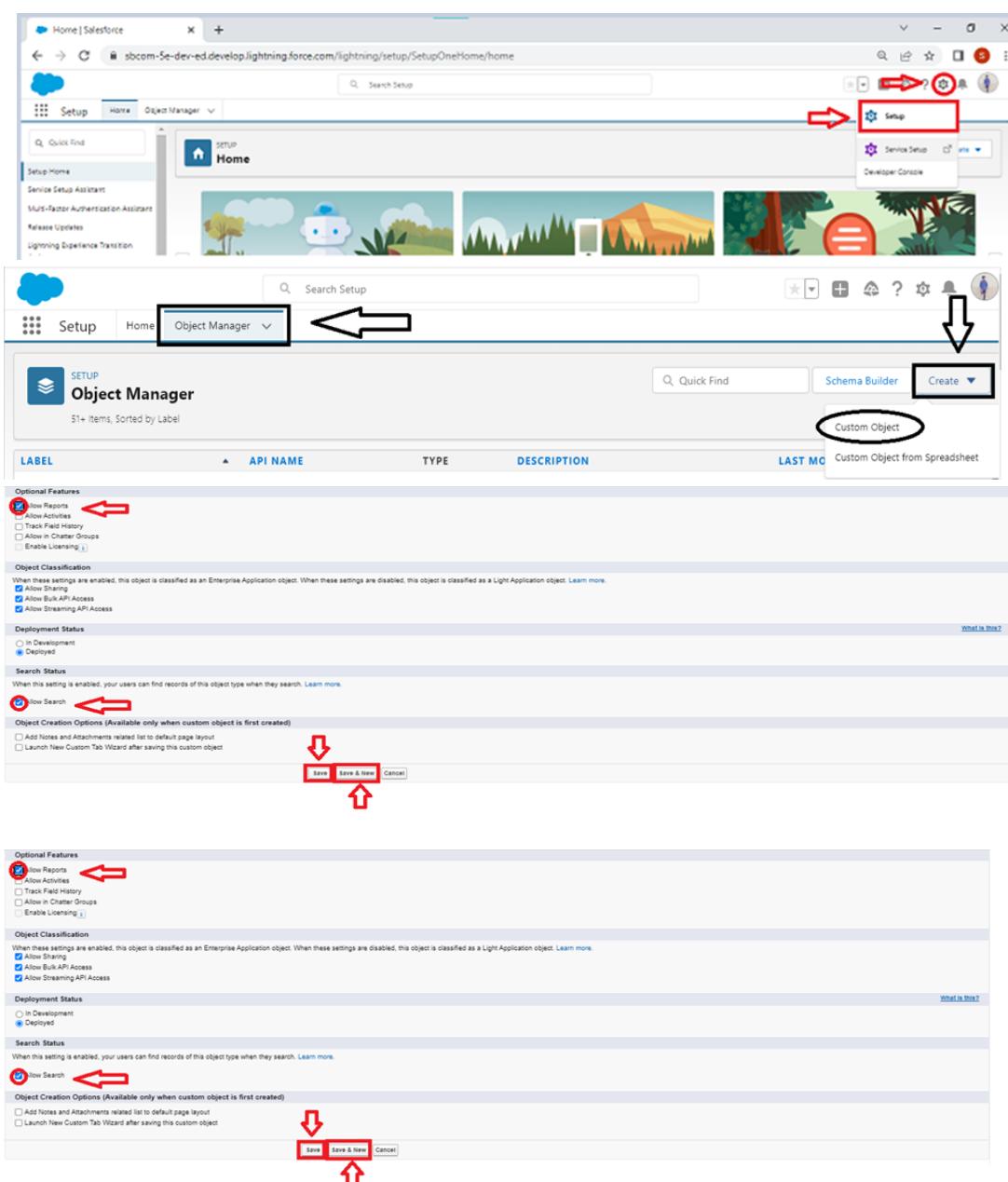


Task 3:

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.



Task 4:

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

Task 5:

Create consumer Objects

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

1. Enter the label name>>consumer
2. Plural label name>> consumers
3. Enter Record Name Label and Format
 - Record Name >>
 - Data Type >> Auto Number
 - Display Format >> consumers-{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. On the left, a sidebar lists various setup categories like Fields & Relationships, Page Layouts, and Lightning Record Pages. The main area is titled 'Details' for the 'consumer' object. It shows the API name as 'consumer__c', which is marked as 'Custom'. The singular label is 'consumer' and the plural label is 'consumers'. On the right, there are checkboxes for enabling Reports, Activities, and Field History, all of which are checked. Below these are deployment status ('Deployed') and help settings ('Standard salesforce.com Help Window'). At the bottom right, there are 'Edit' and 'Delete' buttons. The top of the window shows the URL 'gntc2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IWU0000018LbN/Details/view' and the title 'consumer | Salesforce'.

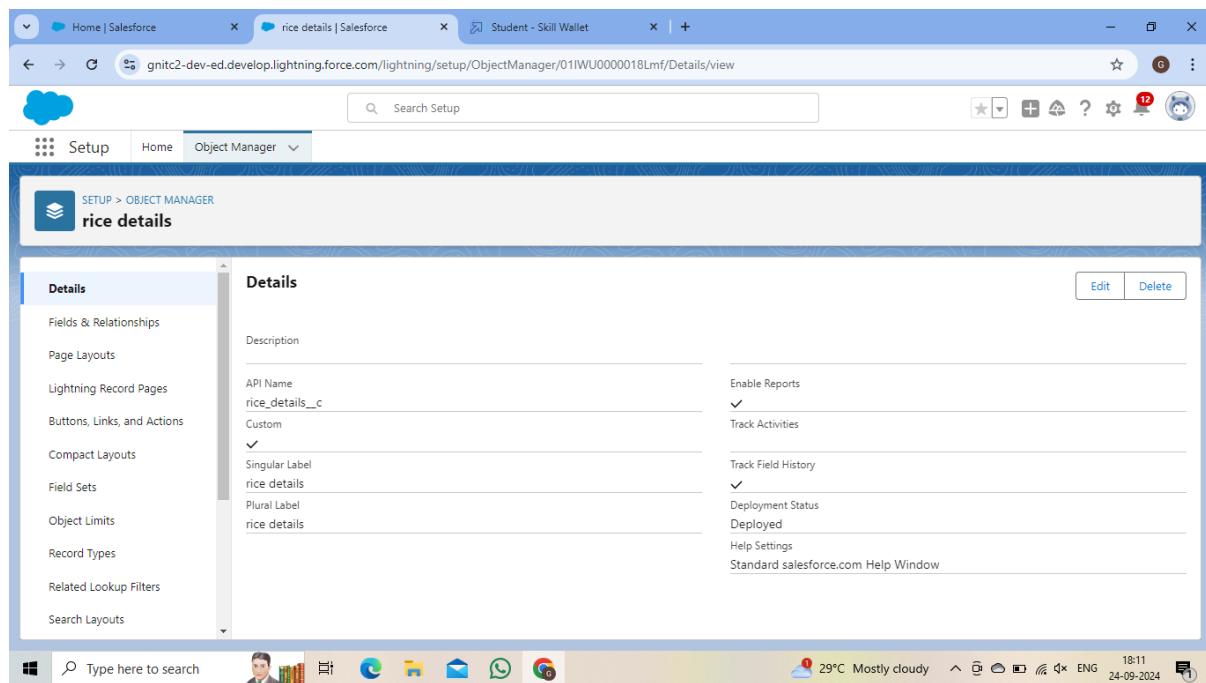
Task 6:

Create rice details Objects

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

1. Enter the label name>>rice details
2. Plural label name>> rice details
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.**

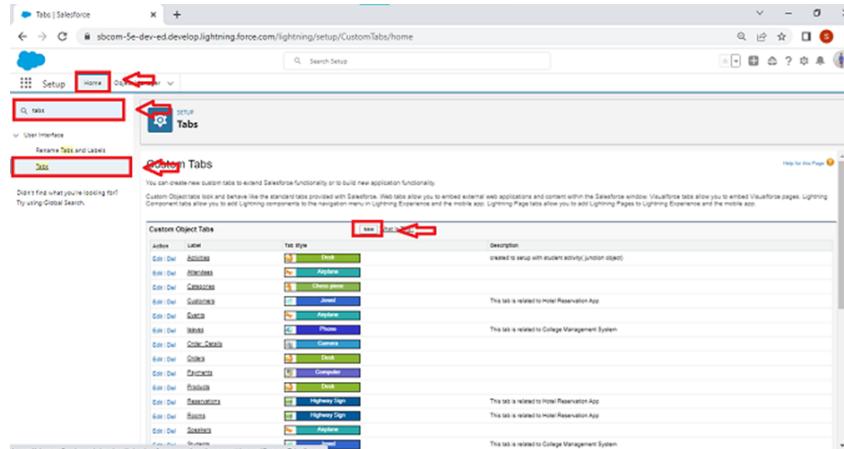


Task 7:

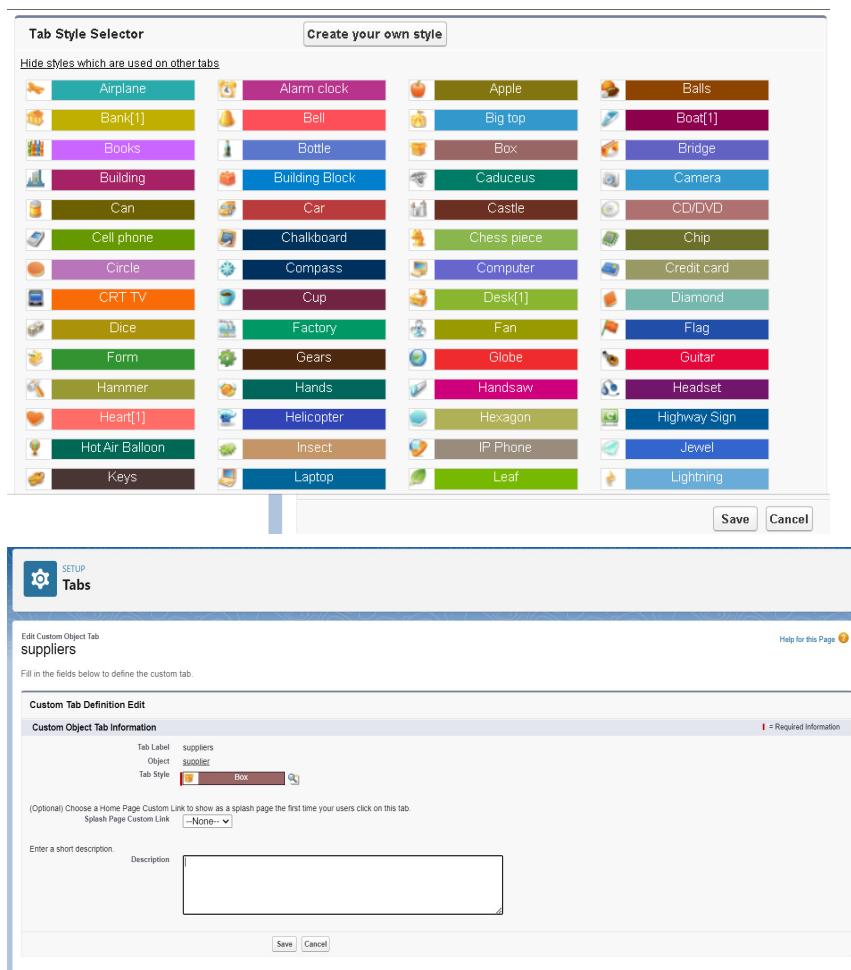
Creating a Custom Tab

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.



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	<input type="checkbox"/> Include Tab
Platform (standard__Platform)	<input type="checkbox"/>
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	<input type="checkbox"/> Include Tab
Platform (standard__Platform)	<input type="checkbox"/>
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"/>

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 type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<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

Home | Salesforce Tabs | Salesforce Student - Skill Wallet

gnitc2-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fu%2Fcustomtabs.jsp%3Fsetupid%3DCustomTabs%26retURL%3D%252...

Cloud Search Bar: Search Setup

Setup Home Object Manager

Custom Tabs

Help for this Page

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	consumers	Castle	
Edit Del	rice_details	Compass	
Edit Del	rice_mills	Desk	
Edit Del	suppliers	Building Block	

Web Tabs

No Web Tabs have been defined

Type here to search

Windows Taskbar: 29°C Mostly cloudy, ENG, 24-09-2024, 18:23

Task 9:

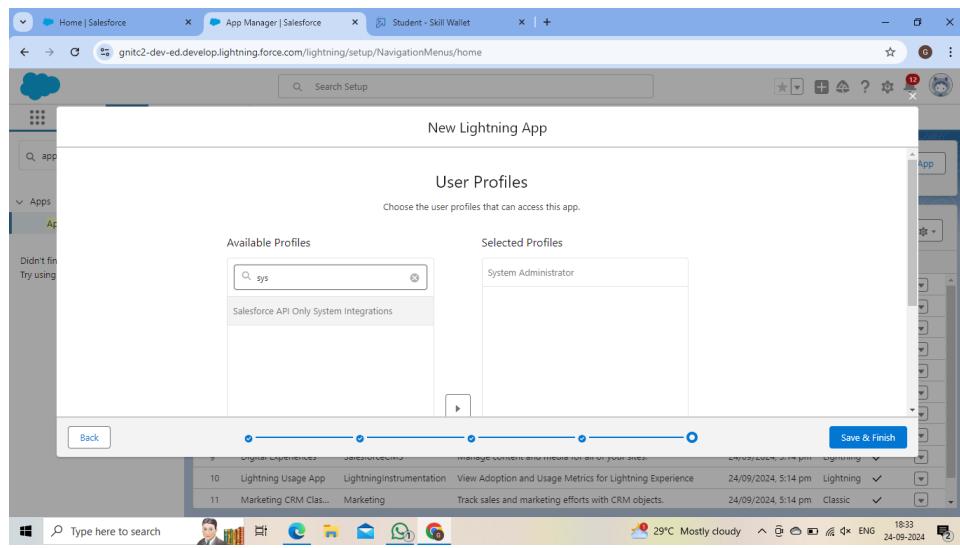
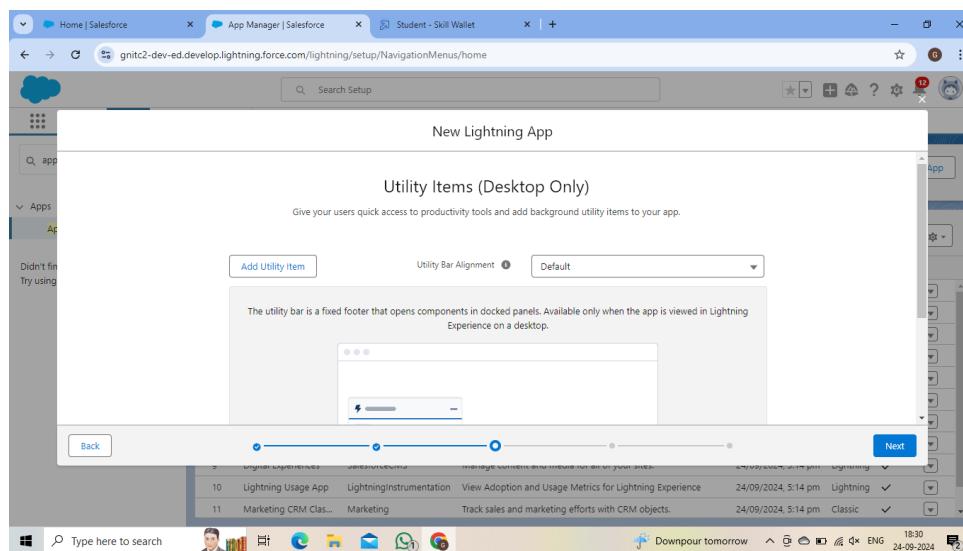
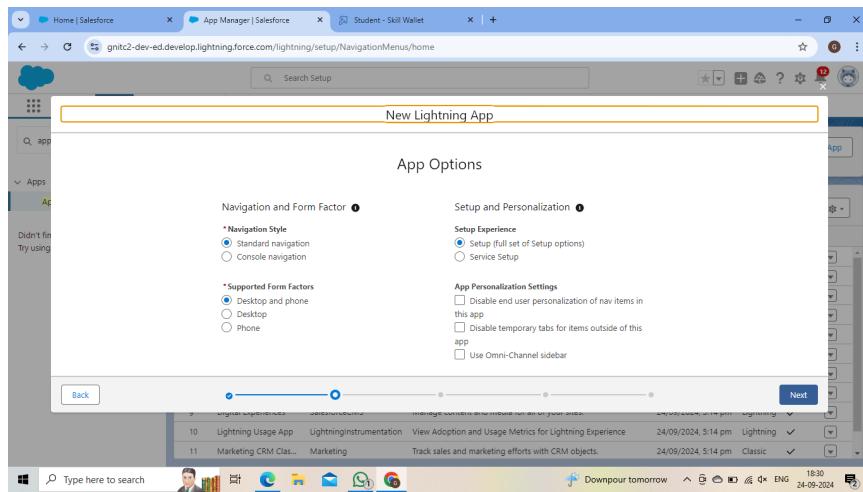
Create a Lightning App

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 are tabs for 'Setup', 'Home', and 'Data Manager'. Below the tabs, there are two main sections: 'App Manager' and 'App Launcher'. A red box highlights the 'App Manager' section. In the center, there's a title 'Lightning Experience App Manager' with a sub-section 'Create Apps (Beta)'. To the right of the title, there are two buttons: 'New Lightning App' (highlighted with a red box) and 'New Connected App'. Below these buttons is a note: 'Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the Winter 23 release notes.' A toggle switch labeled 'Enable App Cloning' is shown as 'Disabled'. The main area contains a table listing 35 items, with columns for 'App Name', 'Developer Name', 'Description', 'Last Modified', 'App Type', and 'Version'. The table includes entries like 'All Tabs', 'Analytics Studio', 'App Launcher', 'Bolt Solutions', 'Chatter Desktop', 'Chatter Mobile for BlackBerry', 'Community Management System', 'Content', and 'Data Manager'. The entire interface is set against a light blue background with a white header bar.

The screenshot shows the 'New Lightning App' dialog box. The title bar says 'New Lightning App'. The form has fields for 'Developer Name' (set to 'MY_RICE') and 'Description' (with placeholder 'Enter a description...'). There is also a checkbox for 'Org Theme Options' and a note about using the app's image and color instead of the org's custom theme. Below the form is a preview window titled 'App Launcher Preview' showing a blue square with 'MR' and 'MY RICE' text. At the bottom of the dialog is a 'Next' button. The background shows the Salesforce navigation bar with tabs for 'Home', 'App Manager', and 'Student - Skill Wallet'. The status bar at the bottom indicates 'Type here to search' and shows system icons.



Home | Salesforce App Manager | Salesforce Student - Skill Wallet

gnitc2-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

New Lightning App

Navigation Items

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

Available Items Selected Items

rice mills
consumers
suppliers
rice details

Back Next

Digital Experiences Sales Overview Manage content and media for all of your sites.

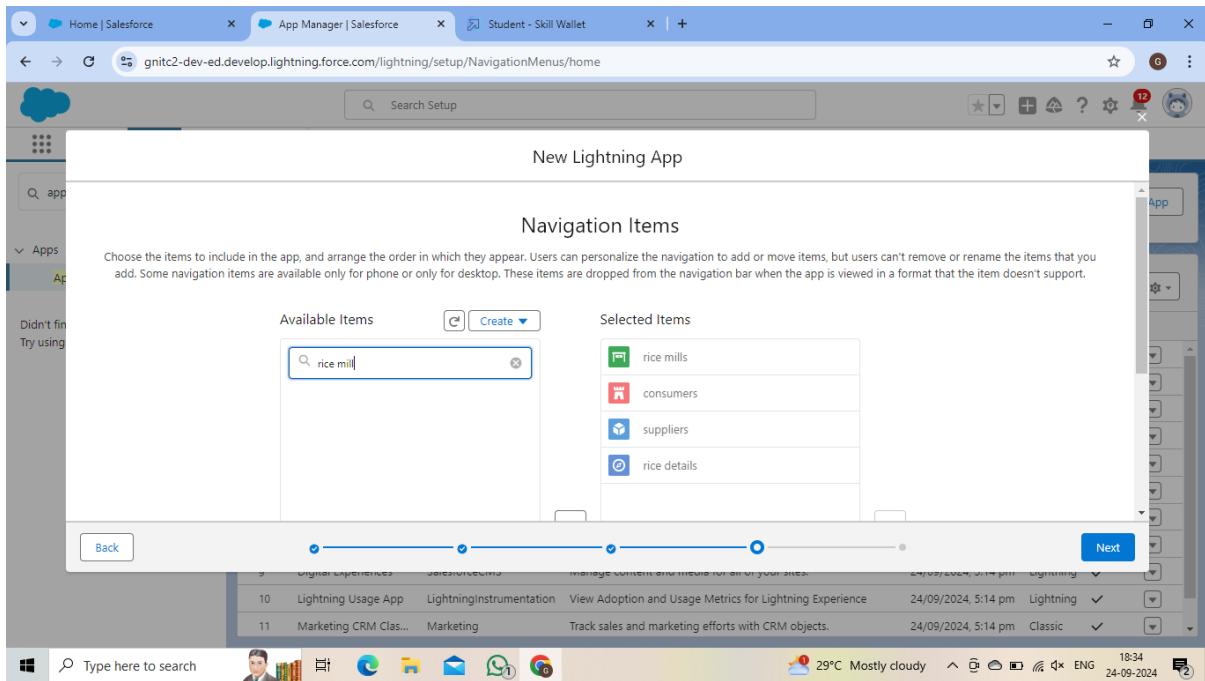
9 24/09/2024, 5:14 pm Lightning

10 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 24/09/2024, 5:14 pm Lightning

11 Marketing CRM Clas... Marketing Track sales and marketing efforts with CRM objects. 24/09/2024, 5:14 pm Classic

Type here to search

29°C Mostly cloudy 18:34
24-09-2024



Task 10:

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

The screenshot shows the Salesforce Object Manager for the 'Supplier' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, etc. The main area is titled 'Fields & Relationships' with a sub-header '5 Items, Sorted by Field Label'. It contains a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table rows include: Created By (CreatedBy), Last Modified By (LastModifiedBy), Owner (OwnerId), Sum of Fuel supplied (Sum_of_Fuel_supplied__c), and supplier Name (Name). At the top right of the table area, there are buttons for Quick Find, New, Deleted Fields, Field Dependencies, and Set History Tracking. Red arrows highlight the 'Fields & Relationships' button in the sidebar and the 'New' button in the header.

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

This screenshot is identical to the one above, showing the 'Fields & Relationships' section for the 'Supplier' object. It highlights the 'Fields & Relationships' button in the sidebar and the 'New' button in the header of the list view.

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

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

The screenshot shows the 'Step 2. Enter the details' configuration screen for creating a new field. The top bar says 'Step 2 of 4' with 'Previous' and 'Next' buttons. The main form has fields: 'Field Label' (with a red box and arrow), 'Length' (with a red box and arrow), 'Field Name' (disabled), 'Description' (text area), 'Help Text' (text area), 'Decimal Places' (0), 'Required' (checked), 'Unique' (unchecked), 'External ID' (unchecked), 'AI Prediction' (unchecked), and 'Auto add to custom report type' (checked). A red arrow points to the 'Field Label' input field.

Home | Salesforce rice details | Salesforce Student - Skill Wallet

gnitc2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IWU0000018Lmf/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
rice details

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)		▼
rice details Name	Name	Auto Number		▼
rice distributed	rice_distributed_c	Number(5, 0)		▼

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

Type here to search

29°C Mostly cloudy 18:43 24-09-2024

Task 11:

Creating Junction Object

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

The screenshot shows the Salesforce Object Manager interface. A red box highlights the 'Object Manager' button in the top navigation bar. Another red box highlights the 'rice details' object in the list, which is a Custom Object named 'College Management System'. The 'Last Modified' and 'Deployed' columns show the date 16-10-2022 and a checkmark respectively.

2. Click on fields & relationship - click New.

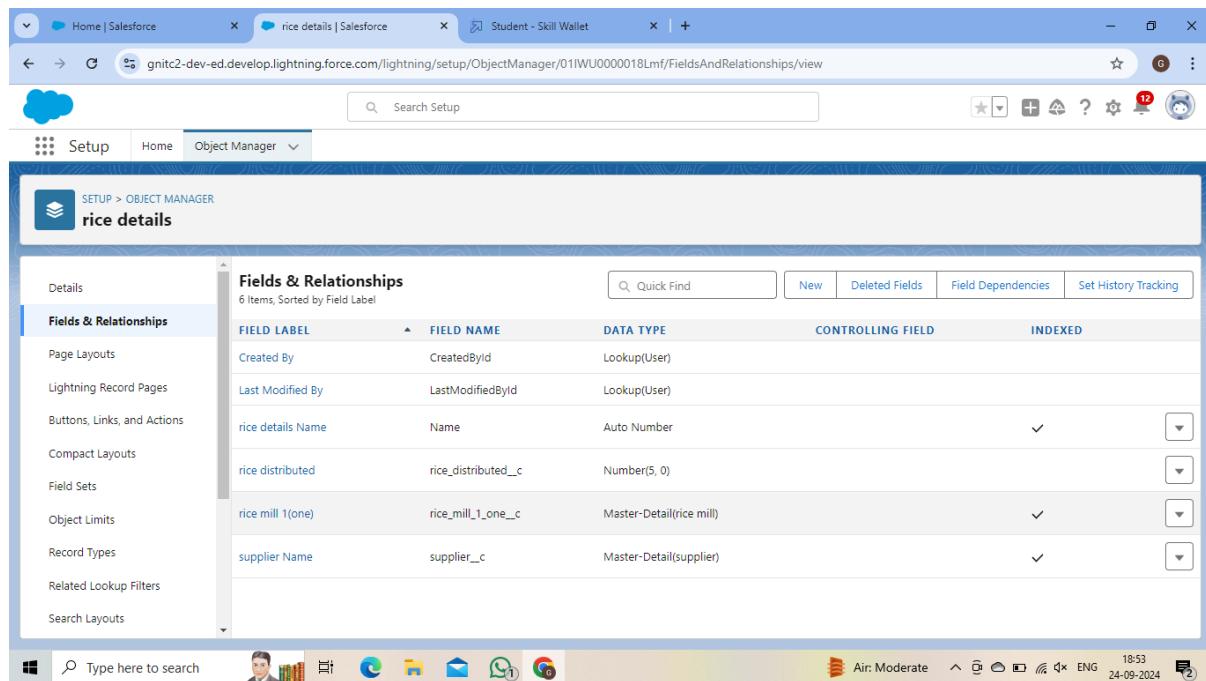
The screenshot shows the 'Fields & Relationships' section for the 'Supplier' object. A red box highlights the 'Fields & Relationships' tab in the sidebar. Another red box highlights the 'New' button at the top right of the list table. The table lists various fields like 'Created By', 'Last Modified By', 'Owner', etc., along with their field names and data types.

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

The screenshot shows the 'New Relationship' wizard, Step 2 of 6. A red box highlights the 'Fields & Relationships' tab in the sidebar. The main area shows the 'Related To' dropdown set to 'supplier'. Navigation buttons for 'Previous', 'Next', and 'Cancel' are visible at the bottom.

5. Give Field Label as "supplier Name" and click Next.
6. Next >> Next >> Save & New.

7. Follow the same steps from 1 to 3.
8. Select the related object " rice mill " and click Next.
9. Give Field Label as "rice mill 1(one)" and click Next.
10. Next >> Next >> Save.



The screenshot shows the Salesforce Object Manager Fields & Relationships page for the 'rice details' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main content area displays a table titled 'Fields & Relationships' with the following data:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
rice details Name	Name	Auto Number		✓
rice distributed	rice_distributed_c	Number(5, 0)		
rice mill 1(one)	rice_mill_1_one_c	Master-Detail(rice mill)		✓
supplier Name	supplier_c	Master-Detail(supplier)		✓

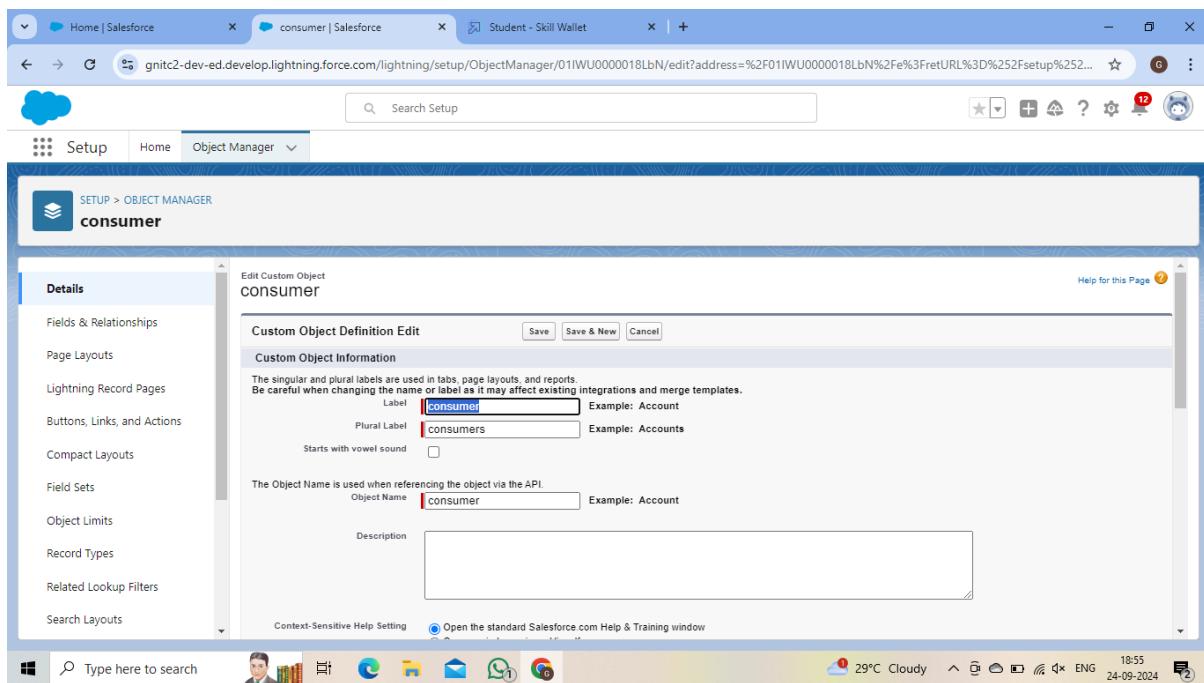
Task 12:

Creating a Master-Detail Relationship

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.



Task 13:

Creating the Roll-up Summary

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 'Search Setup' and a red arrow pointing to the 'Object Manager' button in the top navigation bar. Below the navigation bar, the title 'Object Manager' is displayed with a red box around it. In the search bar at the top right, 'Supplier' is typed, with a red box around it and another red arrow pointing to the 'Create' button. The main table lists two objects: 'Supplier' (Custom Object, College Management System) and 'Student_Activity' (Custom Object, created for the purpose of junction object). Both rows have red boxes around their 'Label' and 'API Name' columns.

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 options like Page Layouts, Record Types, and Field Sets. The 'Fields & Relationships' section is highlighted with a red box. In the main area, a table lists fields such as Name, Age, Created By, Date of Birth, Date of Joining, Gender, Last Modified By, Name, Owner, Phone No., Record Type, and Zipcode. A red box highlights the 'New' button at the top right of the table header. The entire table area is enclosed in a red box.

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

The screenshot shows the 'Data Type' selection step. It asks for the type of information the custom field will contain. Below is a table with three options:

- None Selected
- Auto Number
- Formula
- Rollup Summary

A red box highlights the 'Rollup Summary' option. To the right, a note explains that it is a read-only field displaying 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.

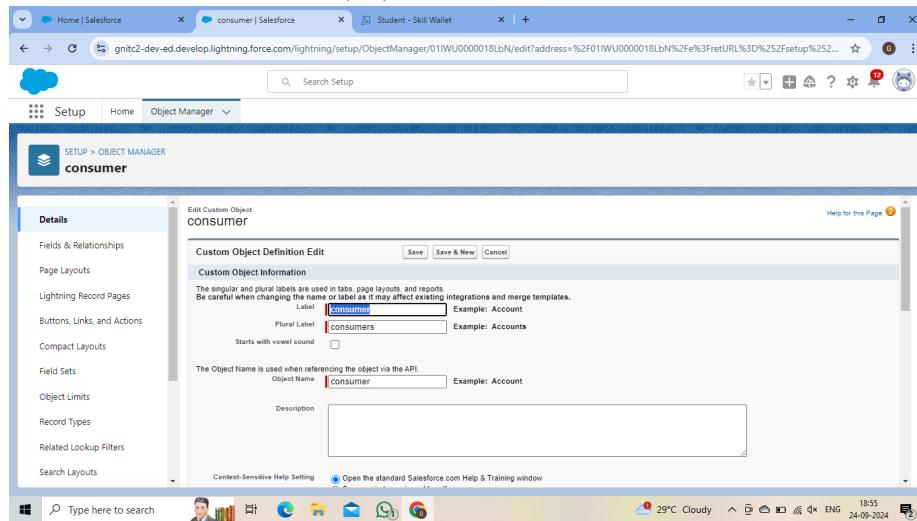
4. Give the Field label as " sum of rice distributed ",Field Name will be Auto generated, and click Next

The screenshot shows the 'Step 2. Enter the details' page for creating a new custom field. The page title is 'New Custom Field'. The steps are labeled 'Step 2 of 5'. The form fields are:

- Field Label: sum of rice distributed
- Field Name: sum_of_rice_distributed
- Description: the total amount of rice distributed to customer or shopowner
- Help Text: (empty)

At the bottom, there are checkboxes for 'Auto add to custom report type' and 'Add this field to existing custom report types that contain this entity'. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom right.

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



Task-14:

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.

The screenshot shows the Salesforce Object Manager interface for the 'Supplier' object. The left sidebar lists various setup options like Details, Page Layouts, Lightning Record Pages, etc. The main area is titled 'Fields & Relationships' and displays a table of existing fields. The 'New' button at the top right is highlighted with a red box. A red arrow points from the 'Fields & Relationships' tab in the sidebar to the table.

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

The screenshot shows the 'Step 2. Enter the details' configuration screen for creating a new field. It includes fields for Field Label (highlighted), Length (highlighted), Field Name, Description, Help Text, and several checkboxes for field properties. The 'Next' button at the top right is highlighted with a red box. A red arrow points from the 'Field Label' input field to the 'Length' input field.

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

Home | Salesforce rice details | Salesforce Student - Skill Wallet

gnitc2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IWU0000018Lmf/FieldsAndRelationships/00NWU000003ii8s/view

Setup Home Object Manager

rice details Custom Field
Supplier Name

Back to rice details

Validation Rules

Custom Field Definition Detail

Field Information

Field Label	supplier Name	Object Name	rice_details
Field Name	supplier	Data Type	Master-Detail
API Name	supplier__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Gadusu Laxmanasai	Created On	24/09/2024, 6:51 pm
		Modified By	Gadusu Laxmanasai
		Modified On	24/09/2024, 7:17 pm

Master-Detail Options

Related To	supplier	Child Relationship Name	rice_details
Related List Label	rice details		

Type here to search

Live 19:19 24-09-2024

Setup Home Object Manager

rice details

SETUP > OBJECT MANAGER

Help for this Page

Task 15:

Creating Fields in rice mill Objects

1. Go to the setup page >> click on object manager >> From drop down click edit for rice mill object.
2. Click on fields & relationship >> click on New.
3. Select Data type as "number" and click Next.
4. Given the Field Label as "rice price/kg" length as " 5
5. Field Name will be auto populated, and click on Next>> N

The screenshot shows the Salesforce Object Manager interface for the 'rice mill' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, Buttons, etc. The main content area is titled 'Fields & Relationships' and displays a table of existing fields. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The visible rows include:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
rice distributed to shops	rice_distributed_to_shops__c	Roll-Up Summary (SUM rice details)		▼
rice mill Name	Name	Auto Number		✓
rice taken	rice_taken__c	Roll-Up Summary (SUM consumer)		▼

Task 16:**Creating Fields in consumer Objects**

S.no	Object name	Fields	data type						
1.	consumer	<table border="1"> <tr> <td>First name</td><td>Text</td></tr> <tr> <td>Last name</td><td>Text</td></tr> <tr> <td>Phone number</td><td>phone</td></tr> </table>	First name	Text	Last name	Text	Phone number	phone	
First name	Text								
Last name	Text								
Phone number	phone								
		<table border="1"> <tr> <td>email</td><td>email</td></tr> <tr> <td>Rice taken by shops</td><td>Number (length=5)</td></tr> </table>	email	email	Rice taken by shops	Number (length=5)			
email	email								
Rice taken by shops	Number (length=5)								
		<table border="1"> <tr> <td>Rice type</td><td>(Picklist values) 1.basmati 2.normal rice</td></tr> <tr> <td>Mode of payment</td><td> Picklist values <ul style="list-style-type: none"> • Credit card • Debit card • Net banking • UPI • Cash </td></tr> </table>	Rice type	(Picklist values) 1.basmati 2.normal rice	Mode of payment	Picklist values <ul style="list-style-type: none"> • Credit card • Debit card • Net banking • UPI • Cash 			
Rice type	(Picklist values) 1.basmati 2.normal rice								
Mode of payment	Picklist values <ul style="list-style-type: none"> • Credit card • Debit card • Net banking • UPI • Cash 								

Task-17:

Creating Cross Object Formula Field in consumer Object

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

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

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

Step 2. Choose output type

Step 2 of 5

Field Label Field Name

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

Formula Return Type

None Selected Select one of the data types below.

Checkbox Calculate a boolean value.
Example: `TODAY() > CloseDate`

Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost__c`

Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = CloseDate - 7`

Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `Next = Now().__d + 1`

Number Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius__c + 32`

Percent Calculate a percent and automatically add the percent sign to the number.
Example: `Discount = (Amount - Discounted_Amount__c) / Amount`

Previous Next Cancel

5. Insert fields formula should be :
`rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c`
6. Under Advanced Formula write down the formula and click “Check Syntax” and Save.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' for the 'consumer' object. A validation rule is being edited. The formula is:

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

The formula dropdown shows the `ABS` function selected.

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.

The screenshot shows the Salesforce Setup interface with the formula editor for a new formula field. The formula is:

```
amount paid (Number) =
rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c
```

The formula dropdown shows the `ABS` function selected.

Task-18:

Creating the validation rule

Creating the validation rule for phone number field 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 like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Validation Rules' and shows one item: 'phonenumeroremailblankrule'. This rule has an error message 'please fill phone number' and is marked as active. A 'New' button is visible at the top right of the list table.

3. Enter the Rule name as "Phonenumeroremailblankrule".
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' screen. The 'Rule Name' is set to 'phonenumeroremailblankrule' and 'Active' is checked. The 'Description' is 'phone number and email should not be blank'. In the 'Error Condition Formula' section, the formula 'OR(ISBLANK(phone_number_c) , ISBLANK(email_c))' is entered. A tooltip for the 'ISBLANK' function is shown, explaining it returns true if the argument is blank. The 'Check Syntax' button at the bottom left shows 'No errors found'.

6.Under the error message write as"please fill in your phone number."

7.Select error location "top of page".

Insert Field Insert Operator ▾

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

AACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign
Help on this function

Check Syntax

Error Message

Example: Discount percent cannot exceed 30%

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

Error Message

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

Error Location Top of Page Field

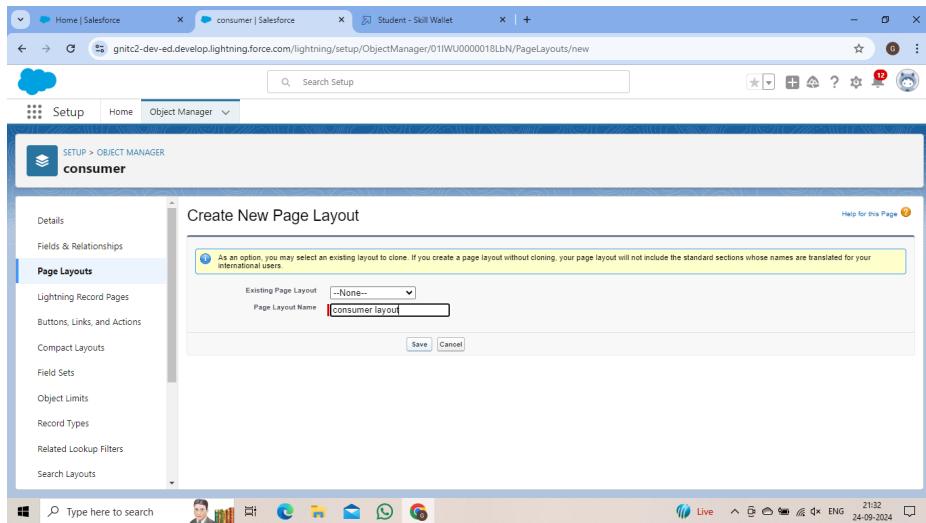
8. Save the validation rule.

Task-19:

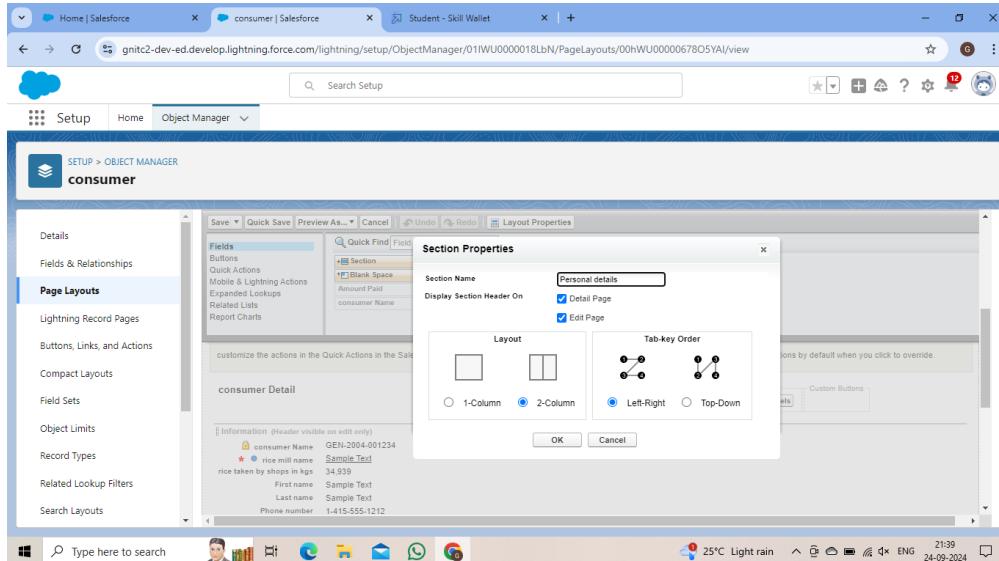
creating the page layout

To Create a Page layout:

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

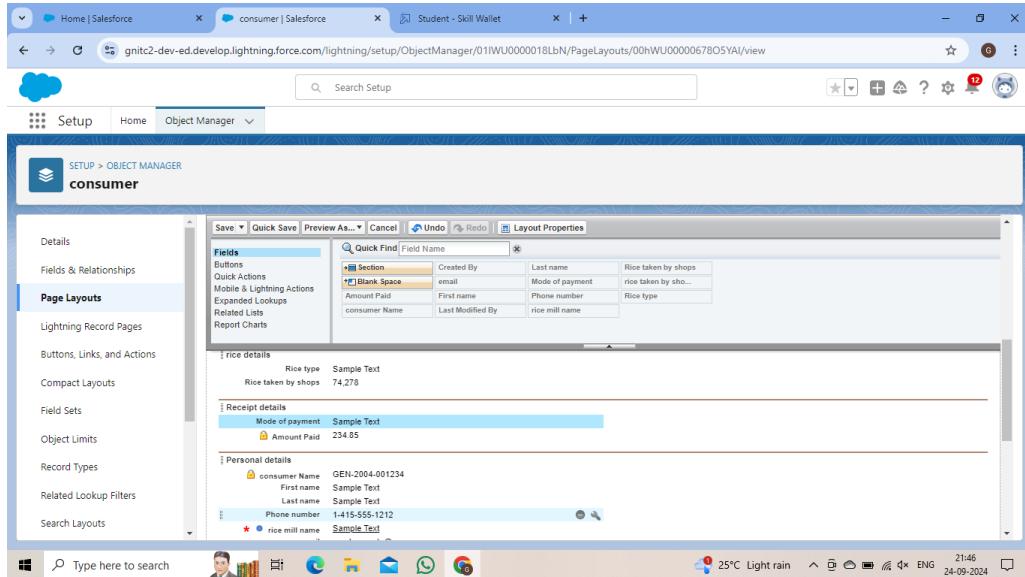


3. Select the existing page layout, and give the page layout name as "consumer layout", and click save.
4. Drag and drop the section field to consumer details and create the section.
5. Enter the section name as "Personal details", - click Ok.



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.



Task-20:

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 Salesforce Setup interface for managing Profiles. The URL is <https://gnitc2-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eWU000005MXVV%3Fsetupid%3DEnhancedProfiles>. The page title is "Profiles". The "Profile Detail" section shows a new profile named "owner" with "User License" set to "Salesforce". The "Page Layouts" section lists various standard object layouts and their assignments. The status bar at the bottom indicates it's 26°C, mostly cloudy, and the date is 25-09-2024.

2. 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.

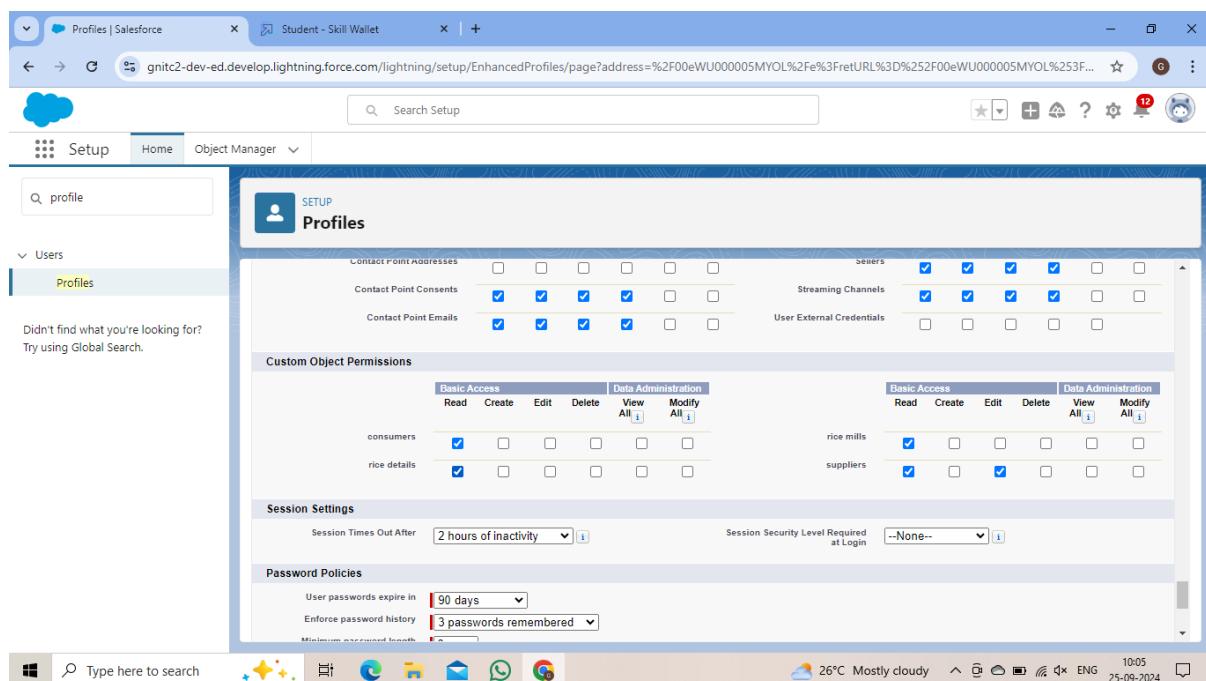
The screenshot shows the "Custom Object Permissions" section of the Salesforce Setup. It displays two tables of permissions for different objects. The first table covers Assets, Asset Services, books, Brokers, consumers, Employees, energy audits, item details, nick names, positions, Projects, ProjectTasks, and Properties. The second table covers purchasers, reviews, rice details, rice mills, SolarBots, SolarBot Status, studs, students, super marts, suppliers, teachers, tickets, and vendors. Each table has columns for Basic Access (Read, Create, Edit, Delete, View All, Modify All) and Data Administration (Read, Create, Edit, Delete, View All, Modify All). Checkmarks indicate which permissions are granted for each object.

- 3.Give access and save it.

Task-21:

employer Profile

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

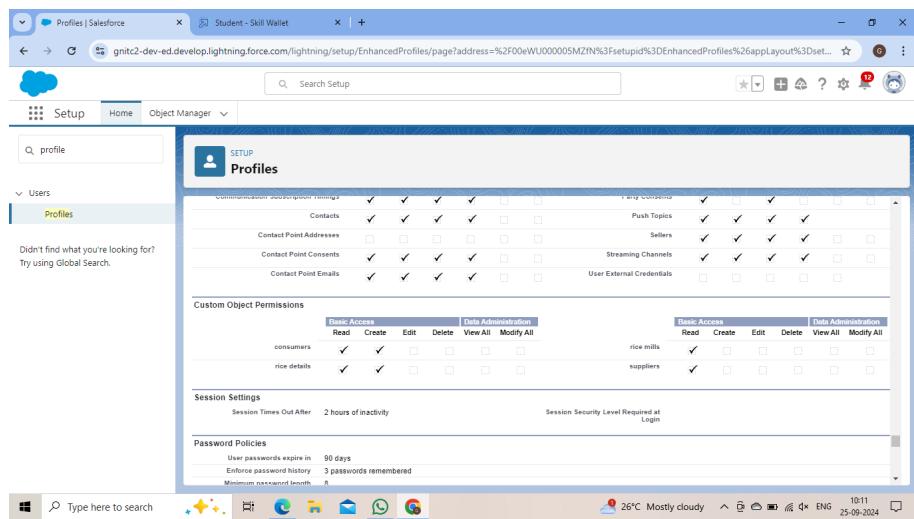


5. And click save.

Task-22:

worker Profile

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



5. And click save.

Task-23:

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.

The screenshot shows the Salesforce Setup interface for Roles. The 'Roles' link in the sidebar is highlighted with a red box. The main content area displays a 'Role Hierarchy' diagram. At the top level is 'Executive Staff' (CEO, President, CFO, VP Sales). Below it are three regional directors: 'Western Sales Director' (West Sales), 'Eastern Sales Director' (East Sales), and 'International Sales Director' (Int Sales). Each regional director oversees several sales representatives (Sales Reps) at the bottom level. A callout box provides a detailed description of each role level: Executive Staff can view and edit data, roll up forecasts, and access reports for all users below them or other Executive Staff. Regional Directors can view and edit data, roll up forecasts, and access reports for all users directly below them or at the same level. Sales Reps can view and edit data, roll up forecasts, and access reports only for own data. A 'Set Up Roles' button is located at the bottom right of the page.

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

The screenshot shows the 'Your Organization's Role Hierarchy' page. The 'Expand All' link is highlighted with a red box. The tree view shows the organization structure under 'Nick Enterprises'. It includes 'Add Role', 'CEO', 'HR', 'Manager', 'On Site Emp', 'Remote Emp', and other role levels. Each node has 'Edit | Del | Assign' options.

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

The screenshot shows the 'Role Edit' page for a new role. The 'Label' field is set to 'owner'. The 'Role Name' field is also 'owner'. The 'This role reports to' dropdown is set to 'CEO'. The 'Role Name as displayed on reports' field is empty. The 'Save' button is at the bottom.

5.Click and save it.

Salesforce - Roles | Student - Skill Wallet

gnitc2-dev-ed.develop.lightning.force.com/lightning/setup/Roles/home

Setup Home Object Manager

roles

Users Roles Feature Settings Sales Service Case Teams Case Team Roles Cases

Contact Roles on Contracts Contact Roles on Opportunities Contact Roles on Cases Didn't find what you're looking for? Try using Global Search.

SETUP Roles

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

Your Organization's Role Hierarchy

GNITC

- CEO
- CFO
- COO
- SVP, Customer Service & Support
- Customer Support, International
- Customer Support, North America
- Installation & Repair Services
- SVP, Human Resources
- SVP, Sales & Marketing

USD/INR -0.08% 10:14 25-09-2024

```
graph TD; GNITC[GNITC] --> CEO[CEO]; GNITC --> CFO[CFO]; GNITC --> COO[COO]; GNITC --> SVP_CSS[SVP, Customer Service & Support]; GNITC --> CSIntl[Customer Support, International]; GNITC --> CSNA[Customer Support, North America]; GNITC --> IRS[Installation & Repair Services]; GNITC --> SHR[SVP, Human Resources]; GNITC --> SSM[SVP, Sales & Marketing]; CEO --> AddRoleCEO[Add Role]; CFO --> AddRoleCFO[Add Role]; COO --> AddRoleCOO[Add Role]; SVP_CSS --> AddRoleSVP_CSS[Add Role]; CSIntl --> AddRoleCSIntl[Add Role]; CSNA --> AddRoleCSNA[Add Role]; IRS --> AddRoleIRS[Add Role]; SHR --> AddRoleSHR[Add Role]; SSM --> AddRoleSSM[Add Role]
```

Task-24:

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.

The screenshot shows the 'Your Organization's Role Hierarchy' page. The hierarchy tree includes nodes like 'smartbridge', 'CEO', 'CFO', 'COO', 'HR', 'owner', 'SVP.Customer Service & Support', 'SVP.Human Resources', and 'SVP.Sales & Marketing'. Under the 'owner' node, there is an 'Add Role' button highlighted with a red box. The top navigation bar has 'SETUP' and 'Roles' buttons, and the bottom right corner has a 'Help for this Page' link.

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 'Your Organization's Role Hierarchy' page after changes. The 'owner' node now has two children: 'employer' and 'employee'. The 'employer' node is selected, indicated by a red box around it. A red box also highlights the 'Add Role' button under the 'employer' node. The rest of the hierarchy remains the same as in the previous screenshot.

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

The screenshot shows the Salesforce Setup interface for managing Roles. On the left, a sidebar lists categories like Users, Roles, Feature Settings, Sales, Service, Case Teams, and Contact Roles. The 'Roles' section is selected. In the main content area, a role named 'employer' is displayed. The 'Label' field is set to 'worker'. The 'Role Name' field also displays 'employer'. Other details shown include 'This role reports to owner', 'Modified By Gadusu Laxmanasai 25/09/2024, 10:25 am', 'Opportunity Access' (Users can edit all opportunities associated with accounts they own), and 'Case Access' (Users can edit all cases associated with accounts they own). A 'Role Detail' section at the bottom right shows 'Sharing Groups' assigned to 'Role and Internal Subordinates'. Below the role details, a sub-section titled 'Users in employer Role' shows no records displayed. The top navigation bar includes links for Roles | Salesforce, Student - Skill Wallet, and the current page address gnitc2-dev-ed.lightning.force.com/lightning/setup/Roles/page?address=%2F00EWU000004cp7%3Fsetupid%3DRoles. The bottom taskbar shows various application icons and system status.

Task-25:

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.

User Edit
vicky y

User Edit

Save | Save & New | Cancel

General Information

First Name	vicky
Last Name	y
Alias	vy
Email	ramesh0820@gmail.com
Username	ramesh0820@754123gmail
Nickname	vicky
Title	
Company	
Department	
Division	

Role: owner

User License: Salesforce

Profile: owner

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Data.com User Type:

Data.com Monthly Addition Limit: 300

Users | Salesforce

VICKY Y

User Detail

Name	vicky y
Alias	vy
Email	gadusulaxmanasai143@gmail.com Verify
Username	gadusulaxmanasai2003@gmail.com
Nickname	Vicki
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	

User License: Salesforce

Profile: owner

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Mobile Push Registrations: [View](#)

Data.com User Type: [1](#)

12. Save it.

Task-26:

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.

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

- Page Header:** Users | Salesforce, Student - Skill Wallet
- Search Bar:** Search Setup
- Left Sidebar:** Setup, Home, Object Manager, Users (selected), Feature Settings, Data.com, Prospector (Users)
- Message Bar:** Didn't find what you're looking for? Try using Global Search.
- Content Area:**
 - User Detail:** User named "ram ram".
 - Name:** ram ram
 - Alias:** rram
 - Email:** gadusulaxmanasai143@gmail.com (Verify)
 - Username:** gadusulai@2003gmail.com
 - Nickname:** Ram
 - Title:** [empty]
 - Company:** [empty]
 - Department:** [empty]
 - Division:** [empty]
 - Address:** [empty]
 - Time Zone:** (GMT+05:30) India Standard Time (Asia/Kolkata)
 - Locale:** English (India)
 - Language:** Finnish
 - Role:** employer
 - User License:** Salesforce Platform
 - Profile:** Standard Platform User
 - Active:** checked
 - Marketing User:** [checkbox]
 - Offline User:** [checkbox]
 - Knowledge User:** [checkbox]
 - Flow User:** [checkbox]
 - Service Cloud User:** [checkbox]
 - Site.com Contributor User:** [checkbox]
 - Site.com Publisher User:** [checkbox]
 - WDC User:** [checkbox]
 - Mobile Push Registrations:** View
- Bottom Bar:** Type here to search, system icons, weather (26°C Mostly cloudy), date (25-09-2024), time (11:01), and language (ENG).

Task-27:

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.

The screenshot shows the Salesforce Setup interface for creating a new user. The URL in the browser is <https://gnitc2-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005WU000005mdH7%3Fnoredirect%3D1%26isUserEntityOverride%3D1>. The page title is "User". The user being edited is "ragu raju". The "User Detail" section shows the following information:

Field	Value	Role
Name	ragu raju	SVP_Customer Service & Support
Alias	rraju	User License
Email	gadusulaxmanasai143@gmail.com [Verify]	Profile
Username	laxman@2003gmail.com	Standard Platform User
Nickname	Raguraj	Active
Title		Marketing User
Company		Offline User
Department		Knowledge User
Division		Flow User
Address		Service Cloud User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Contributor User
Locale	English (India)	Site.com Publisher User
Language	Finnish	WDC User
		Mobile Push Registrations

The left sidebar shows the navigation menu under "Users": Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users (which is selected). Other sections like Feature Settings, Data.com, and Prospector are also visible. The bottom of the screen shows the Windows taskbar with various icons and system status.

Task-28:

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. A red arrow points to the 'Sharing Settings' link in the left sidebar. Another red box highlights the 'Edit' button in the top right corner of the main table area. The table lists various objects with their default internal and external access levels and hierarchy grants.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public: Read/Write/Transfer	Private	✓
Account and Contract	Public: Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓

This screenshot shows the same 'Sharing Settings' page as above, but it's running on a Windows operating system. The taskbar at the bottom includes icons for File Explorer, Task View, Edge browser, Mail, and Google Chrome. The date and time on the taskbar are 11:06 25-09-2024. A red box highlights the 'Edit' button in the top right of the table area.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public: Read/Write/Transfer	Private	✓
Account and Contract	Public: Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public: Read/Write	Private	✓
Case	Public: Read/Write/Transfer	Private	✓

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.

Task-29:

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.

Report Name	Description	Folder	Created By	Created On	Subscribed
range of amount per day	estimated rice per day	estimated rice per day	udayrushi.yelagandula	10/7/2023, 2:41 pm	
range of amount per day	estimated rice per day	estimated rice per day	udayrushi.yelagandula	13/7/2023, 12:56 pm	
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	25/4/2023, 10:49 am	

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

Report Type Name	Category
rice mills with consumers	Standard

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

The screenshot shows the Salesforce report builder interface. The report is titled "New rice mills with consumers Report" and is set to "rice mills with consumers". The "Outline" tab is selected. The "Groups" section contains a "GROUP ROWS" entry for "rice taken by shops". The "Columns" section lists "consumer: consumer name", "rice type", "# rice price/kg", "mode of payments", and "# amount paid". The main area displays a table with 11 rows of data, each representing a consumer entry. The columns correspond to the selected group and column fields.

	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

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

The screenshot shows the Salesforce report viewer interface. The report is titled "rice mills with consumers range of amount per day". At the top, it displays summary statistics: Total Records (10), Total rice price/kg (398), and Total Amount Paid (6,577.00). Below this is a detailed table with data grouped by "Rice taken by shops". The table includes columns for "consumer: consumer Name", "rice price/kg", "Rice type", "Mode of payment", and "Amount Paid". The data shows multiple entries for different consumers like consumers-001, consumers-002, etc., with various rice types and payment methods. Subtotals are shown for each group of "Rice taken by shops".

Rice taken by shops	consumer: consumer Name	rice price/kg	Rice type	Mode of payment	Amount Paid
5 (1)	consumers-001	55	1.basmati	Credit card	275.00
Subtotal		55			275.00
6 (3)	consumers-002	55	2.normal rice	Cash	330.00
	consumers-007	60	2.normal rice	Cash	360.00
	consumers-005	86	1.basmati	UPI	516.00
Subtotal		201			1,206.00
8 (3)	consumers-006	82	2.normal rice	Debit card	656.00
	consumers-009	60	2.normal rice	Credit card	480.00
	consumers-010	60	2.normal rice	Cash	480.00
Subtotal		202			1,616.00

Task-30

Sharing report to owner

1. Click edit drop down and select subscribe option

The screenshot shows a Salesforce report titled "range of amount per day". The report details rice sales across different consumers. The data includes columns for Rice taken by shops, consumer Name, rice price/kg, Rice type, Mode of payment, and Amount Paid. The report shows 10 total records with a total amount paid of 6,577.00.

Rice taken by shops	consumer Name	rice price/kg	Rice type	Mode of payment	Amount Paid
5 (1)	consumers-001	55	1.basmati	Credit card	275.00
		55			275.00
6 (3)	consumers-002	55	2.normal rice	Cash	330.00
	consumers-007	60	2.normal rice	Cash	360.00
	consumers-005	86	1.basmati	UPI	516.00
		201			1,206.00
8 (3)	consumers-006	82	2.normal rice	Debit card	656.00
	consumers-009	60	2.normal rice	Credit card	480.00
	consumers-010	60	2.normal rice	Cash	480.00
		202			1,616.00

2. Follow as per below image.

The screenshot shows the "Edit Subscription" dialog box overlaid on a Salesforce report. The dialog box allows setting the frequency (Daily, Weekly, Monthly), time (8:00 am), attachment (Attach file), and recipient (Run Report As: Me). The report in the background shows the same rice sales data as the previous screenshot.

3. After selecting the run report as a "another person" select your personal account or whom you want to send that mail to.

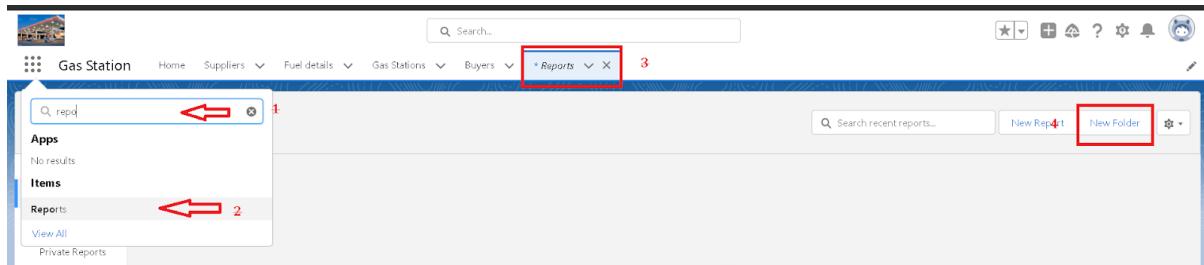
1. Click save.

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

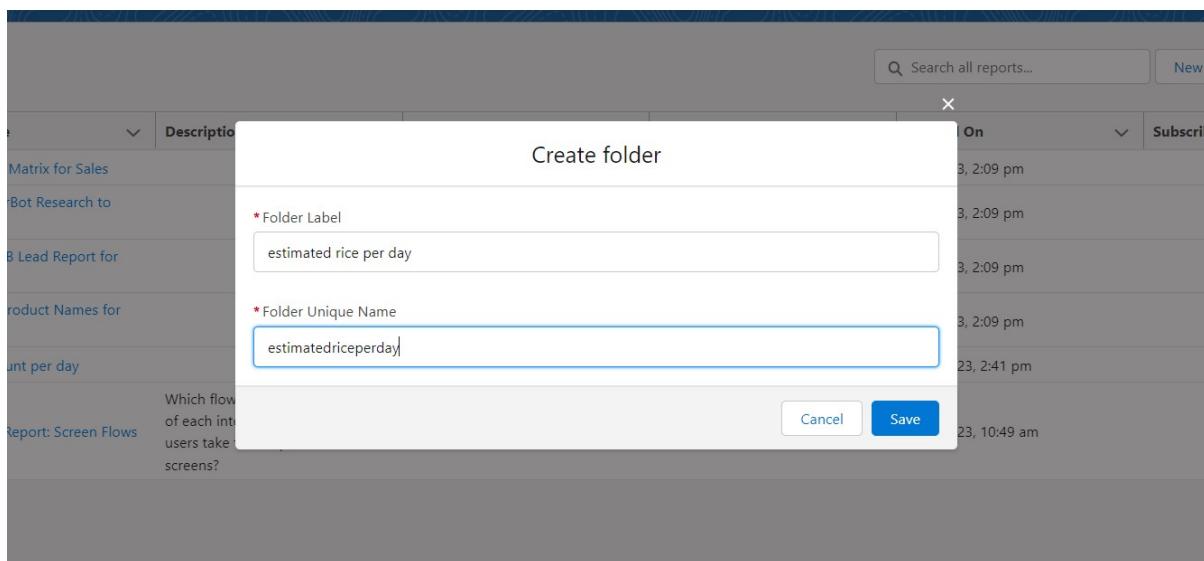
Task-31:

create a report folder

1. Click on the app launcher and search for reports.
2. Double click on the report, “ reports tab” will be auto populated in the navigation bar.
3. Click on the report tab, click on the new folder.



4. Give the Folder label as “estimated rice per day”, Folder unique name will be auto populated.
5. Click save.



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

Reports

II Reports

Items

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		Private Reports	udayrushi yelagandula	10/7/2023, 2:41 pm	
FOLDERS	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	25/4/2023, 10:49 am	
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

Run

Edit

Subscribe

Export

Delete

Add to Dashboard

Favorite

Move

`java void(0)`

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

Sellers ▾ rice mills ▾ rice details ▾

Move range of amount per day

All Folders

Report Name Description

Erin's SB Opp Matrix for Sales

Lincoln's SolarBot Research to remove

Marketing's SB Lead Report for Sales

Potential SB Product Names for R&D

range of amount per day

Sample Flow Report: Screen Flows

Which flows run, what's the status of each interview, and how long do users take to complete the screens?

New Folder Cancel Select

estimated rice per day

Report Recycle Bin

Acquisition Reports

Einstein Bot Reports

Einstein Bot Reports Summer '23

Einstein Bot Reports Summer '22

Einstein Bot Reports Winter '23

estimated rice per day

On Subscribed

3, 2:09 pm

3, 2:09 pm

3, 2:09 pm

3, 2:09 pm

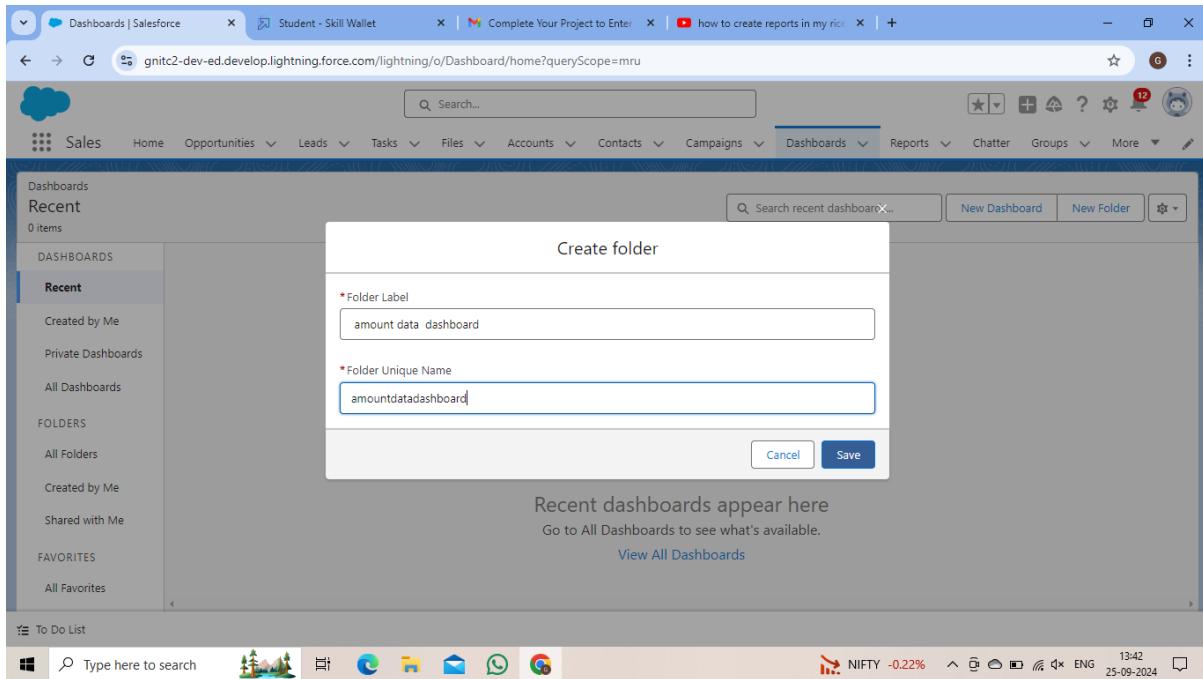
23, 2:41 pm

23, 10:49 am

Task-32:

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.



Task-33:

Create Dashboard

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

The screenshot shows the Employee Management application interface. At the top, there is a navigation bar with various menu items: Home, Employees, Assets, Asset Services, Projects, ProjectTasks, Reports, and Dashboards. The 'Dashboards' item is highlighted with a red box. Below the navigation bar, there is a search bar labeled 'Search...' and a toolbar with icons for star, plus, question mark, settings, and others. The main content area is titled 'Dashboards Recent' and shows a list of recent dashboards: 'Created by Me', 'Private Dashboards', and 'All Dashboards'. A 'New Dashboard' button is visible in the top right corner of this section, also highlighted with a red box.

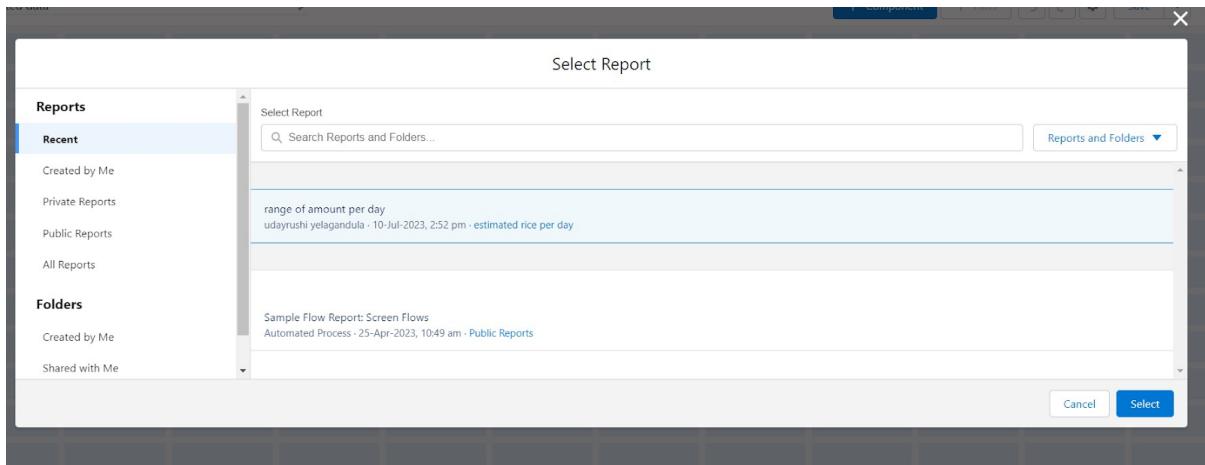
2. Give a Name and select the folder that was created, and click on create.

The screenshot shows a modal dialog box titled 'New Dashboard'. It contains fields for 'Name' (with 'estimated data' entered), 'Description' (with 'total amount of data in dashboards'), and 'Folder' (with 'amount data' entered). There are 'Cancel' and 'Create' buttons at the bottom right. The 'Create' button is highlighted with a red box.

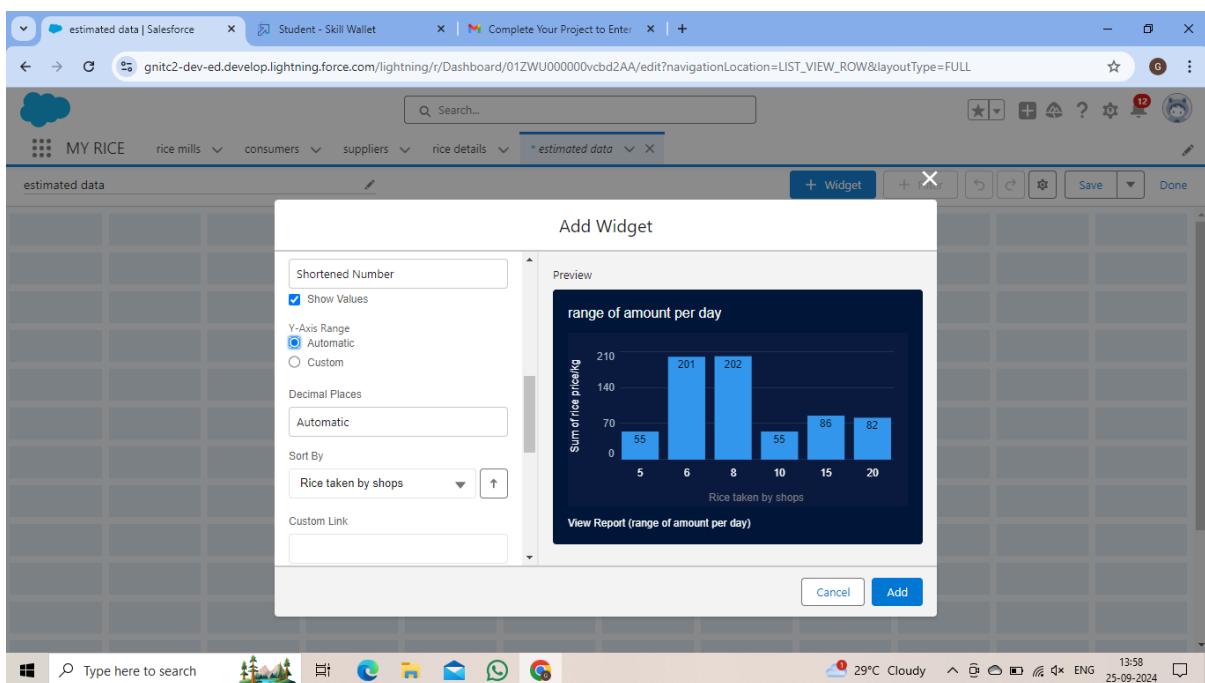
3. Select add component.

The screenshot shows the dashboard editor interface. At the top, there is a navigation bar with the same menu items as the previous screen. Below it, a title bar says 'Dashboard 1'. The main area is a grid for placing components. A toolbar at the top of the grid includes a red-highlighted 'Add Component' button, a 'Filter' button, a 'Save' button, and a 'Done' button.

4. 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

5,Click add.

6.Click save and done.

Add Widget

Preview

range of amount per day

Rice taken by shops

Sum of Amount Paid

6.6k

Rice taken by shops

5 6 8 10 15 20

Footer

Legend Position Right

Widget Theme Light (Dashboard default) Dark

Cancel Add

estimated data | Salesforce

Student - Skill Wallet

Complete Your Project to Enter

MY RICE

rice mills consumers suppliers rice details estimated data

Refresh Edit Subscribe

Dashboard estimated data

total amount of data in dashboards

As of 25-Sep-2024, 2:41 pm Viewing as Gadus Laxmanasai

range of amount per day

Rice taken by shops

Sum of Amount Paid

6.6k

Rice taken by shops

5 6 8 10 15 20

range of amount per day

Rice taken by shops

Sum of Amount Paid

6.6k

Rice taken by shops

5 6 8 10 15 20

Type here to search

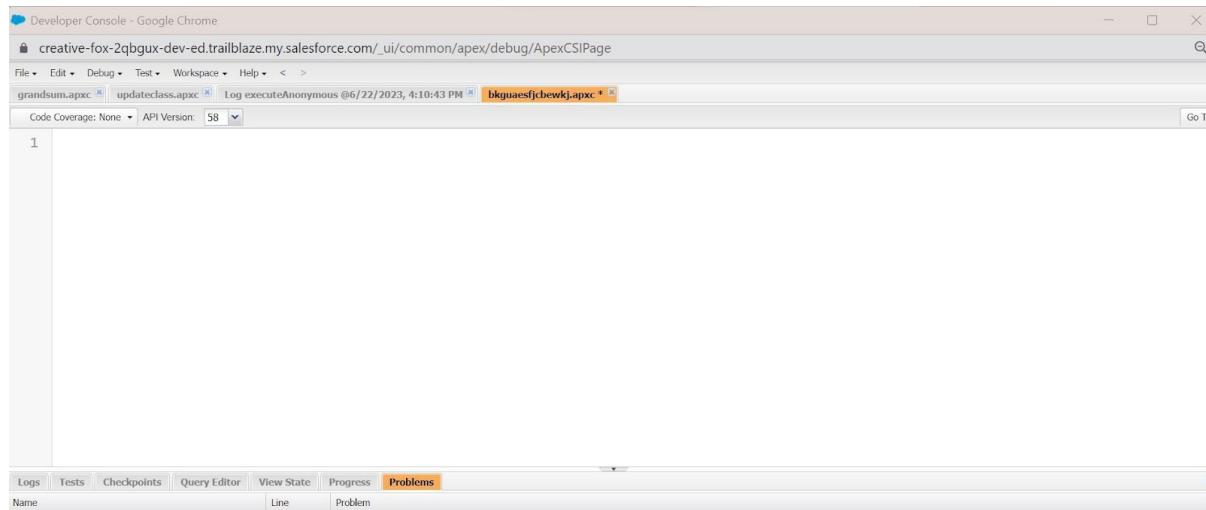
28°C Partly sunny 14:41

25-09-2024

Task-34:

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 :

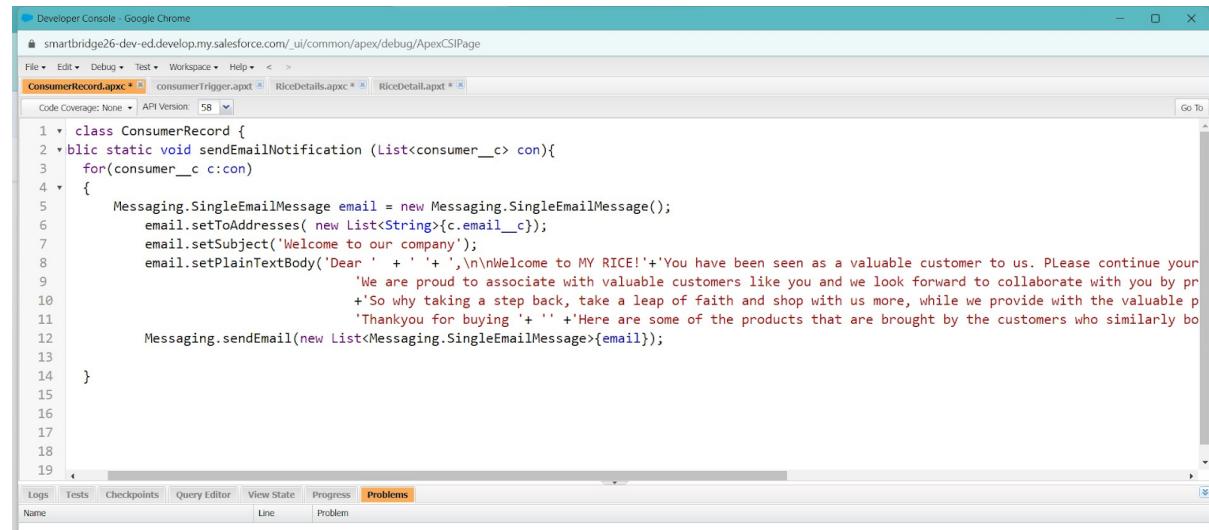
```
class ConsumerRecord {  
    public static void sendEmailNotification (List<consumer__c> con){  
        for(consumer__c c:con)  
        {  
            Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();  
            email.setToAddresses( new List<String>{c.email__c});  
            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+
    '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 in Google Chrome. The URL is smartbridge26-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The tab bar shows ConsumerRecord.apxc (selected), consumerTrigger.apxc, RiceDetails.apxc, and RiceDetail.apxt. The code editor displays the following Apex code:

```
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 }
```

The code editor has a toolbar with File, Edit, Debug, Test, Workspace, Help, and tabs for Code Coverage, Note, and API Version (58). Below the code editor is a navigation bar with Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The Problems tab is selected. A table below the navigation bar lists problems under the Name column.

Task-35:

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.

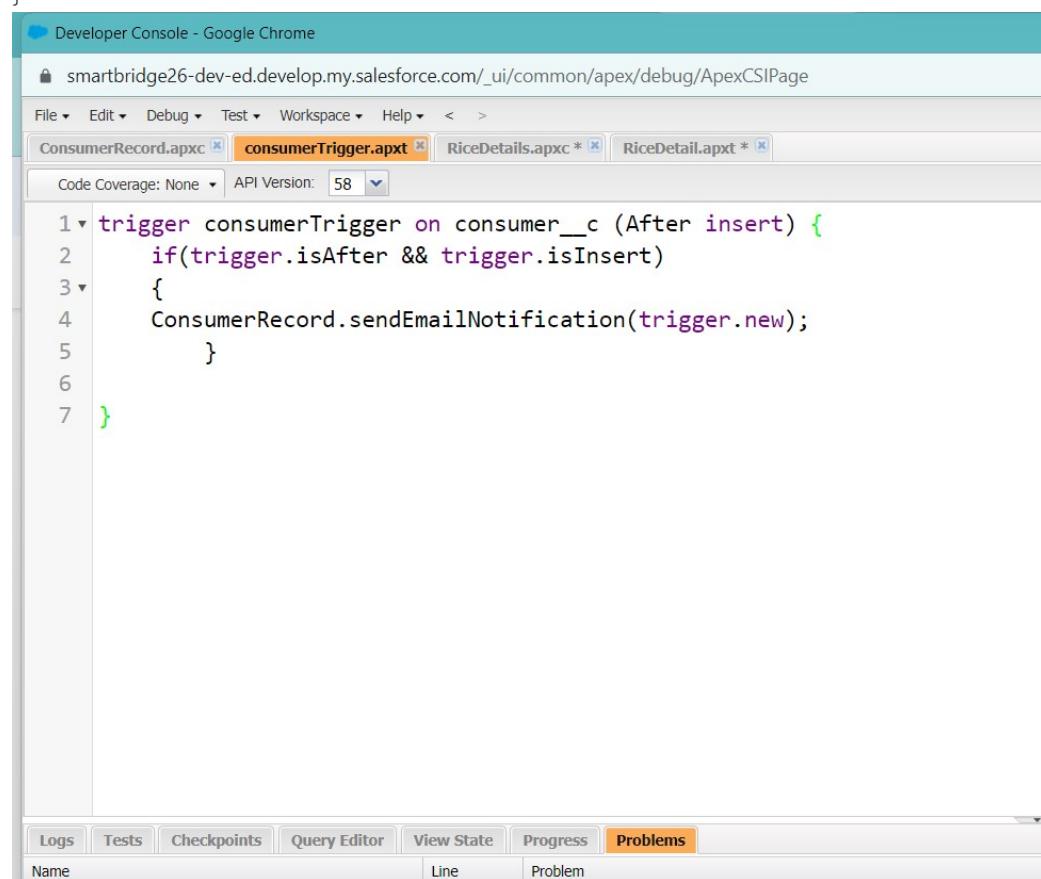
Syntax For creating trigger :

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);  
    }  
}
```



The screenshot shows the Salesforce Developer Console interface. The title bar says "Developer Console - Google Chrome". The URL is "smartbridge26-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage". The tabs at the top are "ConsumerRecord.apxc", "consumerTrigger.apxt" (which is the active tab), "RiceDetails.apxc *", and "RiceDetail.apxt *". Below the tabs, there are dropdown menus for "File", "Edit", "Debug", "Test", "Workspace", and "Help". A status bar at the bottom shows "Code Coverage: None" and "API Version: 58". The main area contains the Apex trigger code:

```
1 trigger consumerTrigger on consumer__c (After insert) {  
2     if(trigger.isAfter && trigger.isInsert)  
3     {  
4         ConsumerRecord.sendEmailNotification(trigger.new);  
5     }  
6 }  
7 }
```

At the bottom of the developer console, there are tabs for "Logs", "Tests", "Checkpoints", "Query Editor", "View State", "Progress", and "Problems". The "Problems" tab is highlighted with an orange background. Below the tabs, there are two columns: "Name" and "Line/Problem".

THANK YOU

