

CRM Application for Wholesale Rice Mill

Leveraging Salesforce to Improve Efficiency in Rice Mill Operations

Prepared by: NANDINEE JAYANT DURGE

Short Description: The Rice Mill Crm Streamlines Daily Rice Production and Sales Reporting, Enhancing Efficiency and Customer Experiences.

It leverages the power of customer relationship management (CRM) to enhance customer experiences, optimize store operations, and improve overall efficiency in the rice mill factory.

This project aims to develop a user-friendly and feature-rich application that addresses the specific needs of a rice mill factory.

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 owner's daily wise. It leverages the power of customer relationship management (CRM) to enhance customer experiences, optimize store operations, and improve overall efficiency in the rice mill factory. This project aims to develop a user-friendly and feature-rich application that addresses the specific needs of a rice mill factory.

TASK-1 INTRODUCTION TO SALESFORCE

ACTIVITY – 1: Creating Developer Account:

The screenshot shows the Salesforce Developer Edition Sign-up page in a web browser. The page has a blue header with the Salesforce logo and the text "Sign up for your Salesforce Developer Edition". Below this, it says "A Salesforce Platform environment for free." and "Complete the form to get access to the Salesforce Developer Edition." The form fields are as follows:

- First Name*: NANDINEE JAVANT
- Last Name*: DURGE
- Email*: nandinee@laxminaraincollegeofte-a1-dev-ed.my.salesforce.com
- Role*: Developer
- Company*: Lakshmi Narain College of Technology and Science
- Country/Region*: India
- State/Province*: Madhya Pradesh
- Postal Code*: 462042
- Username*: nandurges@laxminaraincollegeofte-a1-dev-ed.my.salesforce.com

The left side of the page features a blue background with the text "Build enterprise-quality apps fast to bring your ideas to life" and a list of bullet points:

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

ACTIVITY – 2: Account Activation:

The screenshot shows a Gmail inbox with a single email from "developer@salesforce.com". The email subject is "Welcome to Salesforce: Verify your account". The email body contains the following text:

Thanks for signing up with Salesforce!

Click below to verify your account:

[Verify Account](#)

To easily log in later, save this URL:

<https://lakshminaraincollegeofte-a1-dev-ed.my.salesforce.com>

Username:

[nandurges@laxminaraincollegeofte-a1-dev-ed.my.salesforce.com](#)

1. Give a password and answer a security question and click on change password.

Change Your Password | Salesforce

lakshminaraincollegeofte-a1-dev-ed.develop.my.salesforce.com/_ui/system/security/ChangePassword?retURL=%2Fflightning%2Fsetup%2FSetupOneHome%2Fhome&fr...

Enter a new password for nandurge@inets.com. Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password

Good

* Confirm New Password

Match

Security Question

In what city were you born?

* Answer

Bhopal

Change Password

Password was last changed on 03/10/2024, 7:05 pm.

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

Home | Salesforce

Student - Skill Wallet

Notifications blocked lakshminaraincollegeofte-a1-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Setup Home

Create

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

Most Recently Used

1 items

NAME TYPE OBJECT

TASK- 2 OBJECT

ACTIVITY - Creating Objects

1. SUPPLIER OBJECT: Manage supplier details.

The screenshot shows the Salesforce Object Manager interface for the 'supplier' object. The browser address bar displays the URL: `lakshminaraincollegeofte-a1-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000001YvMf/Details/view`. The page title is 'supplier'. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Details' and includes an 'Edit' button and a 'Delete' button. The details are organized into three columns:

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

2. Rice Mill Object: Manage rice mill details.

The screenshot shows the Salesforce Object Manager interface for the 'rice mill' object. The browser address bar displays the URL: `lakshminaraincollegeofte-a1-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000001YvmT/Details/view`. The page title is 'rice mill'. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Details' and includes an 'Edit' button and a 'Delete' button. The details are organized into three columns:

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

3. Consumer Object: Manage consumer details.

The screenshot shows the Salesforce Setup interface for the 'consumer' object. The browser address bar displays the URL: `lakshminaraincollegeofte-a1-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000001Yw2b/Details/view`. The page title is 'consumer'. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Restriction Rules. The main content area, titled 'Details', includes fields for Description, API Name (consumer__c), Custom (checked), Singular Label (consumer), and Plural Label (consumers). On the right, there are checkboxes for Enable Reports (checked), Track Activities, and Track Field History (checked), along with Deployment Status (Deployed) and Help Settings (Standard salesforce.com Help Window). 'Edit' and 'Delete' buttons are in the top right corner. The Windows taskbar at the bottom shows the time as 20:36 on 05-10-2024.

4. Rice Details Object: Track rice production and sales.

The screenshot shows the Salesforce Setup interface for the 'rice details' object. The browser address bar displays the URL: `lakshminaraincollegeofte-a1-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000001Yw7R/Details/view`. The page title is 'rice details'. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Restriction Rules. The main content area, titled 'Details', includes fields for Description, API Name (rice_details__c), Custom (checked), Singular Label (rice details), and Plural Label (rice details). On the right, there are checkboxes for Enable Reports, Track Activities, and Track Field History, along with Deployment Status (Deployed) and Help Settings (Standard salesforce.com Help Window). 'Edit' and 'Delete' buttons are in the top right corner. The Windows taskbar at the bottom shows the time as 20:38 on 05-10-2024.

TASK -3 TABS

ACTIVITY - Creating Tabs

Create custom tabs for each object to easily access data.

The screenshot shows the Salesforce Setup interface for Custom Tabs. The browser tabs at the top include 'Welcome to the Salesforce Virtual' and 'Tabs | Salesforce'. The address bar shows the URL: 'lakshminaraincollegeofte-a1-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home'. The Salesforce logo is in the top left, and a 'Search Setup' bar is in the top right. The navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar has a search bar with 'tab' and a list of categories: 'Feature Settings', 'Analytics', 'Tableau' (with 'Tableau Embedding' under it), and 'User Interface' (with 'Loaded Console Tab Limit', 'Rename Tabs and Labels', and 'Tabs' under it). The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. It contains two sections: 'Custom Object Tabs' and 'Web Tabs'. The 'Custom Object Tabs' section has a table with four rows: 'consumers' (Lightning style), 'rice details' (Handsaw style), 'rice mills' (Desk style), and 'supplier' (Box style). The 'Web Tabs' section shows 'No Web Tabs have been defined'.

Setup
Tabs

Search Setup

Setup Home Object Manager

tab

Feature Settings

Analytics

Tableau

Tableau Embedding

User Interface

Loaded Console Tab Limit

Rename Tabs and Labels

Tabs

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

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	consumers	Lightning	
Edit Del	rice details	Handsaw	
Edit Del	rice mills	Desk	
Edit Del	supplier	Box	

Web Tabs

No Web Tabs have been defined

TASK – 4 THE LIGHTNING APP

ACTIVITY - Create a Lightning App for the Crm Application.

(MY RICE)

Search Setup

Setup Home Object Manager

app m

Lightning Experience App Manager

New Lightning App New Connected App

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

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...	
9	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	03/10/2024, 6:28 pm	Lightning	✓	
10	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	03/10/2024, 6:28 pm	Lightning	✓	
11	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	03/10/2024, 6:28 pm	Classic	✓	
12	MY RICE	MY_RICE		03/10/2024, 7:46 pm	Lightning	✓	
13	Platform	Platform	The fundamental Lightning Platform	03/10/2024, 6:28 pm	Classic		
14	Queue Management	QueueManagement	Create and manage queues for your business.	03/10/2024, 6:28 pm	Lightning	✓	
15	Sales	Sales	The world's most popular sales force automation (SFA) sol...	03/10/2024, 6:28 pm	Classic		
16	Sales	LightningSales	Manage your sales process with accounts, leads, opportuni...	03/10/2024, 6:28 pm	Lightning	✓	
17	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple r...	03/10/2024, 6:28 pm	Lightning	✓	
18	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles an...	03/10/2024, 6:28 pm	Classic	✓	
19	Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	03/10/2024, 6:32 pm	Lightning	✓	

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

Type here to search

Address

32°C

18:06
04-10-2024

TASK -5 FIELDS

Activity – 1 Creating the number field in rice details object

Activity – 2 Creating Junction Object

Activity -5 Creating Fields in Objects

The screenshot shows the Salesforce Object Manager interface for the 'rice details' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Restriction Rules. The main content area is titled 'Fields & Relationships' and shows a list of 7 items, sorted by Field Label. The table below lists the fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
rice details Name	Name	Auto Number		✓
rice distributed	rice_distributed__c	Number(5, 0)		
rice mill 1(one)	rice_mill_1_one__c	Master-Detail(rice mill)		✓
supplier name 1	supplier_name_1__c	Number(5, 0)		
supplier Name	supplier_Name__c	Master-Detail(supplier)		✓

Activity – 9 Creating the validation rule

The screenshot shows the Salesforce Object Manager interface for the 'consumer' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Restriction Rules. The main content area is titled 'Validation Rules' and shows a list of 1 item, sorted by Rule Name. The table below lists the validation rule:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Phonenumberoremailblankrule	Top of Page	please fill in your phone number.	✓	NANDINEE JAYANT DURGE, 03/10/2024, 9:06 pm

Activity – 3 Creating a Master-Detail Relationship

Activity – 7 Creating Fields in consumer Objects

Activity – 8 Creating Cross Object Formula Field in consumer Object

Browser: lakshminaraincollegeofte-a1-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000001Yw2b/FieldsAndRelationships/view

Setup > Object Manager > consumer

Fields & Relationships

15 Items, Sorted by Field Label

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

Browser: lakshminaraincollegeofte-a1-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000001Yw2b/FieldsAndRelationships/view

Setup > Object Manager > consumer

Fields & Relationships

15 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Last name	Last_name__c	Text(18)		
Mode of payment	Mode_of_payment__c	Picklist		
Phone number	Phone_number__c	Phone		
Record Type	RecordTypeId	Record Type		✓
rice mill name	rice_mill_name__c	Master-Detail(rice mill)		✓
Rice taken by shops	Rice_taken_by_shops__c	Number(5, 0)		
rice taken by shops in kgs	rice_taken_by_shops_in_kgs__c	Number(5, 0)		
Rice type	Rice_type__c	Picklist		

Activity – 4 Creating the Roll-up Summary

The screenshot shows the Salesforce Setup interface for the 'supplier' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows a list of 6 items, sorted by Field Label. The table below lists the fields:

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)		
sum of rice distributed	sum_of_rice_distributed__c	Roll-Up Summary (SUM rice details)		
supplier Name	Name	Text(80)		✓

The bottom of the screen shows the Windows taskbar with various application icons and system information: 32°C, 18:07, 04-10-2024.

Activity - 6 Creating Fields in rice mill Objects

The screenshot shows the Salesforce Setup interface for the 'rice mill' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows a list of 6 items, sorted by Field Label. The table below lists the fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
rice mill name	Name	Auto Number		✓
rice price/kg	rice_price_kg__c	Number(5, 0)		
rice taken	rice_taken__c	Roll-Up Summary (SUM consumer)		

The bottom of the screen shows the Windows taskbar with various application icons and system information: 32°C, 18:07, 04-10-2024.

TASK – 6 PAGE LAYOUTS

ACTIVITY - Creating the page layout - Customize page layouts for each object to enhance user experience.

The screenshot shows the Salesforce Setup interface. The browser address bar displays the URL: `lakshminaraincollegeofte-a1-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000001Yw2b/PageLayouts/view`. The Salesforce logo and a search bar labeled "Search Setup" are visible. The navigation menu includes "Setup", "Home", and "Object Manager". The left sidebar lists various setup options, with "Page Layouts" selected. The main content area shows the "Page Layouts" for the "consumer" object, with 3 items sorted by Page Layout Name. A "Quick Find" search bar and buttons for "New" and "Page Layout Assignment" are present. The table lists three page layouts: "consumer Layout", "Receipt details", and "rice details", all created and modified by "NANDINEE JAYANT DURGE".

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
consumer Layout	NANDINEE JAYANT DURGE, 03/10/2024, 7:27 pm	NANDINEE JAYANT DURGE, 04/10/2024, 12:12 pm
Receipt details	NANDINEE JAYANT DURGE, 03/10/2024, 9:27 pm	NANDINEE JAYANT DURGE, 04/10/2024, 12:12 pm
rice details	NANDINEE JAYANT DURGE, 03/10/2024, 9:25 pm	NANDINEE JAYANT DURGE, 04/10/2024, 12:12 pm

The Windows taskbar at the bottom shows the search bar, application icons, and system tray information including the date and time (18:07, 04-10-2024).

TASK – 7 PROFILES

ACTIVITY – 1 Owner Profile

Browser address bar: lakshminaraincollegeofte-a1-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Setup menu: Setup, Home, Object Manager

Search Setup

Profiles

Profiles

Help for this Page

All Profiles Edit Delete Create New View

New Profile

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

Action	Profile Name	User License
Edit Del ...	owner	Salesforce

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

ACTIVITY – 2 Employer Profile

Browser address bar: lakshminaraincollegeofte-a1-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Search Setup

Setup Home Object Manager

Search: prof

Users Profiles

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

Profiles

Help for this Page

All Profiles Edit | Delete | Create New View

New Profile

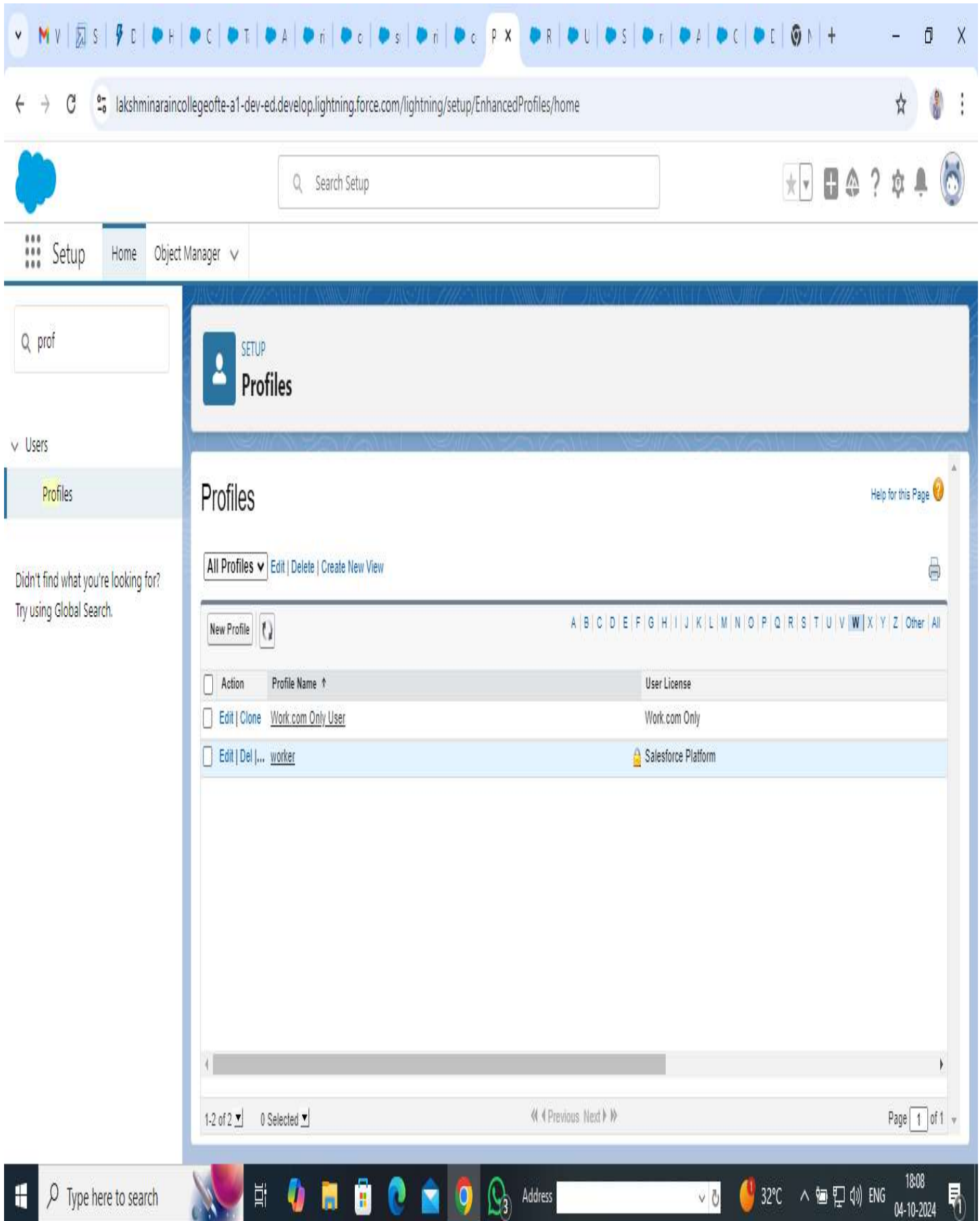
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Profile Name ↑	User License
Edit Delete ...	employer	Salesforce
Edit Clone	External Apps Login User	External Apps Login
Edit Clone	External Identity User	External Identity

1-3 of 3 0 Selected Previous Next Page 1 of 1

Windows taskbar: Type here to search, task icons, Address, 32°C, ENG, 18:08, 04-10-2024

ACTIVITY - 3 Worker Profile



The screenshot shows the Salesforce Setup interface for Profiles. The browser address bar displays the URL: `lakshminaraincollegeofte-a1-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home`. The page title is "Profiles" under the "SETUP" header. A search bar on the left contains the text "prof". The main content area shows a list of profiles with columns for Action, Profile Name, and User License. Two profiles are listed: "Work.com Only User" and "worker". The "worker" profile is highlighted. The page footer shows "1-2 of 2" items, "0 Selected", and "Page 1 of 1".

Search Setup

Setup Home Object Manager

prof

Users

Profiles

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

SETUP Profiles

Profiles

Help for this Page

All Profiles Edit Delete Create New View

New Profile

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

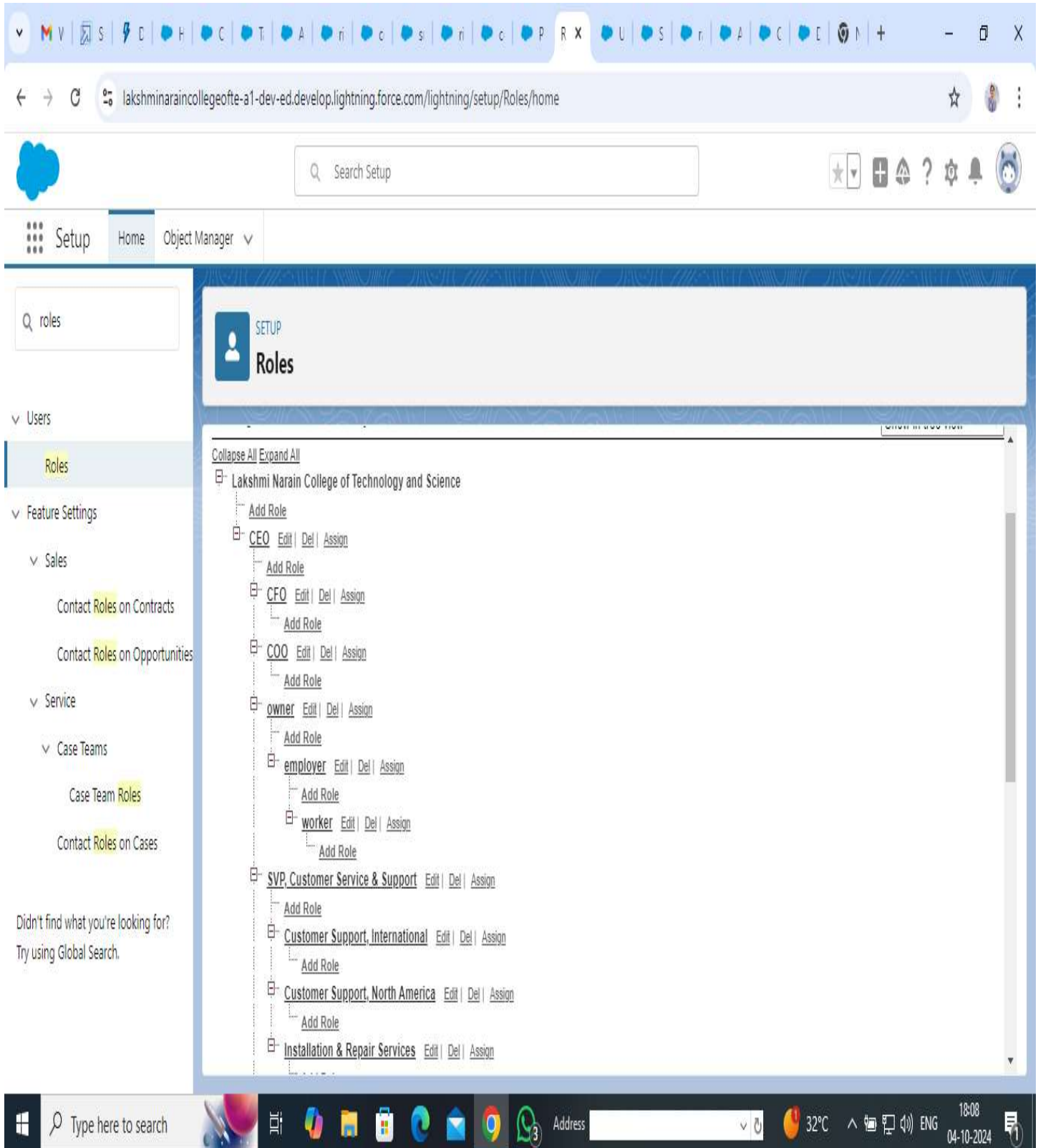
Action	Profile Name	User License
Edit Clone	Work.com Only User	Work.com Only
Edit Del ...	worker	Salesforce Platform

1-2 of 2 0 Selected Previous Next Page 1 of 1

TASK – 8 ROLE & ROLE HIERARCHY

ACTIVITY – 1 Creating owner Role

ACTIVITY – 2 Creating employer roles



The screenshot displays the Salesforce Setup interface for the 'Roles' section. The browser address bar shows the URL: `lakshminaraincollegeofte-a1-dev-ed.develop.lightning.force.com/lightning/setup/Roles/home`. The left sidebar contains navigation options: Setup, Home, and Object Manager. The main content area is titled 'Roles' and shows a hierarchical tree structure for 'Lakshmi Narain College of Technology and Science'. The tree includes roles such as CEO, CFO, COO, owner, employer, worker, SVP, Customer Service & Support, Customer Support, International, Customer Support, North America, and Installation & Repair Services. Each role has an 'Add Role' link. The bottom of the screen shows the Windows taskbar with the search bar, application icons, and system tray information including the date and time (18:08, 04-10-2024).

Search Setup

Setup Home Object Manager

roles

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

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

SETUP Roles

Collapse All Expand All

Lakshmi Narain College of Technology and Science

- Add Role
- CEO Edit Del Assign
 - Add Role
- CFO Edit Del Assign
 - Add Role
- COO Edit Del Assign
 - Add Role
- owner Edit Del Assign
 - Add Role
- employer Edit Del Assign
 - Add Role
- worker Edit Del Assign
 - Add Role
- SVP, Customer Service & Support Edit Del Assign
 - Add Role
- Customer Support, International Edit Del Assign
 - Add Role
- Customer Support, North America Edit Del Assign
 - Add Role
- Installation & Repair Services Edit Del Assign

TASK - 9 USERS

ACTIVITY – 1 Create User

The screenshot displays the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Users' highlighted under 'User Management Settings'. The main content area shows the 'Users' setup page for a user named 'vicky y'. The user's profile is displayed with various details and settings.

User Management Settings

- Users
- Feature Settings
 - Data.com
 - Prospector Users
- Service
- Embedded Service
 - Messaging for In-App and Web User Verification
- User Interface
 - Action Link Templates
 - Actions & Recommendations
 - App Menu
 - Custom Labels
 - Density Settings
- Global Actions
 - Global Actions

Users

User: vicky y

[Permission Set Assignments \(0\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(0\)](#) | [OAuth Apps \(0\)](#) | [Third-Party Account Links \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) | [Login History \(0+\)](#) | [User Provisioning Accounts \(0\)](#)

User Detail

[Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#) [View Summary](#)

Name	vicky y	Role	owner
Alias	v y	User License	Salesforce
Email	nandineejayantdurge@gmail.com (Verify) i	Profile	owner
Username	vickynjd@y.com	Active	<input checked="" type="checkbox"/>
Nickname	vicky i	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View

Windows taskbar: Type here to search, 24°C, 22:16, 06-10-2024

ACTIVITY – 2 Creating another Users

Users | Salesforce x Student - Skill Wallet x +

lakshminaraincollegeofte-a1-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005Qy000008AYNB%3FnoRedirect%3D1%26isUserEntityO...

Search Setup

Setup Home Object Manager

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Custom Labels

Density Settings

Global Actions

Global Actions

SETUP Users

User ram ram

Permission Set Assignments (0) | Permission Set Assignments: Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (1) | OAuth Apps (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0+) | User Provisioning Accounts (0)

User Detail

Edit Sharing Reset Password Freeze View Summary

Name	ram ram	Role	employer
Alias	rram	User License	Salesforce Platform
Email	nandineejayantdurge@gmail.com [Verify]	Profile	Standard Platform User
Username	ram@nid.com	Active	<input checked="" type="checkbox"/>
Nickname	ram	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View

Nandineer Annur

Data.com User Time

Type here to search

Address

24°C

ENG

22:19

06-10-2024

ACTIVITY – 3 Create another User

Users | Salesforce x Student - Skill Wallet x +

lakshminaraincollegeofte-a1-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005Qy000008AYI9%3Fnoredirect%3D1%26isUserEntityOv...

Search Setup

Setup Home Object Manager

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Custom Labels

Density Settings

Global Actions

Global Actions

SETUP Users

User ragu raj

Permission Set Assignments (0) | Permission Set Assignments: Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (2) | OAuth Apps (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0+) | User Provisioning Accounts (0)

User Detail

Edit Sharing Reset Password Freeze View Summary

Name	ragu raj	Role	worker
Alias	raguraj	User License	Salesforce Platform
Email	nandineejayantdurge@gmail.com [Verify]	Profile	Standard Platform User
Username	ragunjd@raj.com	Active	<input checked="" type="checkbox"/>
Nickname	ragu	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View

Nolanstar Anniversary Data.com User Time

Type here to search

Address

23°C

ENG

22:21

06-10-2024

TASK - 10 PERMISSION SETS

ACTIVITY - Creating OWD setting.

Browser address bar: lakshminaraincollegeofte-a1-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home

Setup Home Object Manager

Search Setup

Q shar

Security

Guest User Sharing Rule Access Report

Sharing Settings

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

Sharing Settings

User Provisioning Request	Private	Private	✓
Waitlist	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
consumer	Controlled by Parent	Controlled by Parent	
rice details	Controlled by Parent	Controlled by Parent	
rice mill	Public Read Only	Private	✓
supplier	Public Read Only	Private	✓

Other Settings

Other Settings Help ?

Manager Groups ☐ i

Secure guest user record access ☒ i

Require permission to view record ☐ i

Windows taskbar: Type here to search, Address, 32°C, 18:08, 04-10-2024

TASK – 11 REPORT

ACTIVITY - 1 Create Report

Browser address bar: lakshminaraincollegeofte-a1-dev-ed.develop.lightning.force.com/lightning/o/consumer_c/list?filterName=_Recent

Lightning Experience Header: MY RICE | supplier | rice mills | rice details | **consumers** | * range of amount per day

Section: consumers | Recently Viewed | 10 items • Updated a few seconds ago

Buttons: New, Import, Assign Label

Table:

	<input type="checkbox"/> consumer Name	
1	<input type="checkbox"/> consumers-010	▼
2	<input type="checkbox"/> consumers-009	▼
3	<input type="checkbox"/> consumers-008	▼
4	<input type="checkbox"/> consumers-007	▼
5	<input type="checkbox"/> consumers-006	▼
6	<input type="checkbox"/> consumers-005	▼
7	<input type="checkbox"/> consumers-004	▼
8	<input type="checkbox"/> consumers-003	▼
9	<input type="checkbox"/> consumers-002	▼
10	<input type="checkbox"/> consumers-001	▼

Windows Taskbar: Type here to search | 32°C | 18:09 | 04-10-2024

Report: rice mills with consumers
range of amount per day

Enable Field Editing

Add Chart

Edit

Total Records: 10 Total rice price/kg: 52 Total Amount Paid: 2,288.00

Rice taken by shops	rice mill: rice mill name	consumer: consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
(1)	rice-001	consumers-001	1 basmati	52	Credit card	0.00
Subtotal				52		0.00
1 (2)	rice-001	consumers-005	2 normal rice	52	UPI	52.00
	rice-001	consumers-003	1 basmati	52	UPI	52.00
Subtotal				52		104.00
3 (1)	rice-001	consumers-002	2 normal rice	52	Debit card	156.00
Subtotal				52		156.00
4 (1)	rice-001	consumers-009	2 normal rice	52	Debit card	208.00
Subtotal				52		208.00
5 (1)	rice-001	consumers-004	1 basmati	52	Cash	260.00
Subtotal				52		260.00
6 (1)	rice-001	consumers-007	1 basmati	52	Net banking	312.00
Subtotal				52		312.00
7 (1)	rice-001	consumers-006	2 normal rice	52	Debit card	364.00
Subtotal				52		364.00
8 (1)	rice-001	consumers-008	1 basmati	52	UPI	416.00
Subtotal				52		416.00
9 (1)	rice-001	consumers-010	2 normal rice	52	UPI	468.00
Subtotal				52		468.00
Total (10)				52		2,288.00

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

ACTIVITY – 3 Create a Report Folder

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MY RICE

supplier ▾

rice mills ▾

rice details ▾

consumers ▾

* range of amount per day ▾ X

✎

Reports

Recent

1 item

New Report

New Folder

⚙️

REPORTS	Report Name ▾	Description ▾	Folder ▾	Created By ▾	Created On ▾	Subscribed	
Recent	range of amount per day		estimated rice per day	NANDINEE JAYANT DURGE	4/10/2024, 1:14 pm	✓	▾
Created by Me							
Private Reports							
Public Reports							
All Reports							
FOLDERS							
All Folders							
Created by Me							
Shared with Me							
FAVORITES							
All Favorites							

Type here to search

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04-10-2024

TASK – 12 DASHBOARDS

ACTIVITY – 1 Create Dashboard Folder

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Q Search...

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MY RICE

supplier ▼

rice mills ▼

rice details ▼

consumers ▼

* estimated data ▼ X

* Analytics ▼ X

Dashboards

Recent

1 item

Q Search recent dashboards...

New Dashboard

New Folder

⚙️ ▼

DASHBOARDS	Dashboard Name ▼	Description ▼	Folder ▼	Created By ▼	Created On ▼	Subscribed	
Recent	estimated data	total amount of data in dashboards	amount data dashboard	NANDINEE JAYANT DURGE	4/10/2024, 1:26 pm		▼
Created by Me							
Private Dashboards							
All Dashboards							
FOLDERS							
All Folders							
Created by Me							
Shared with Me							
FAVORITES							
All Favorites							

Windows Taskbar

Type here to search

Address

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18:09

04-10-2024

ACTIVITY -2 Create Dashboard



TASK – 13 APEX

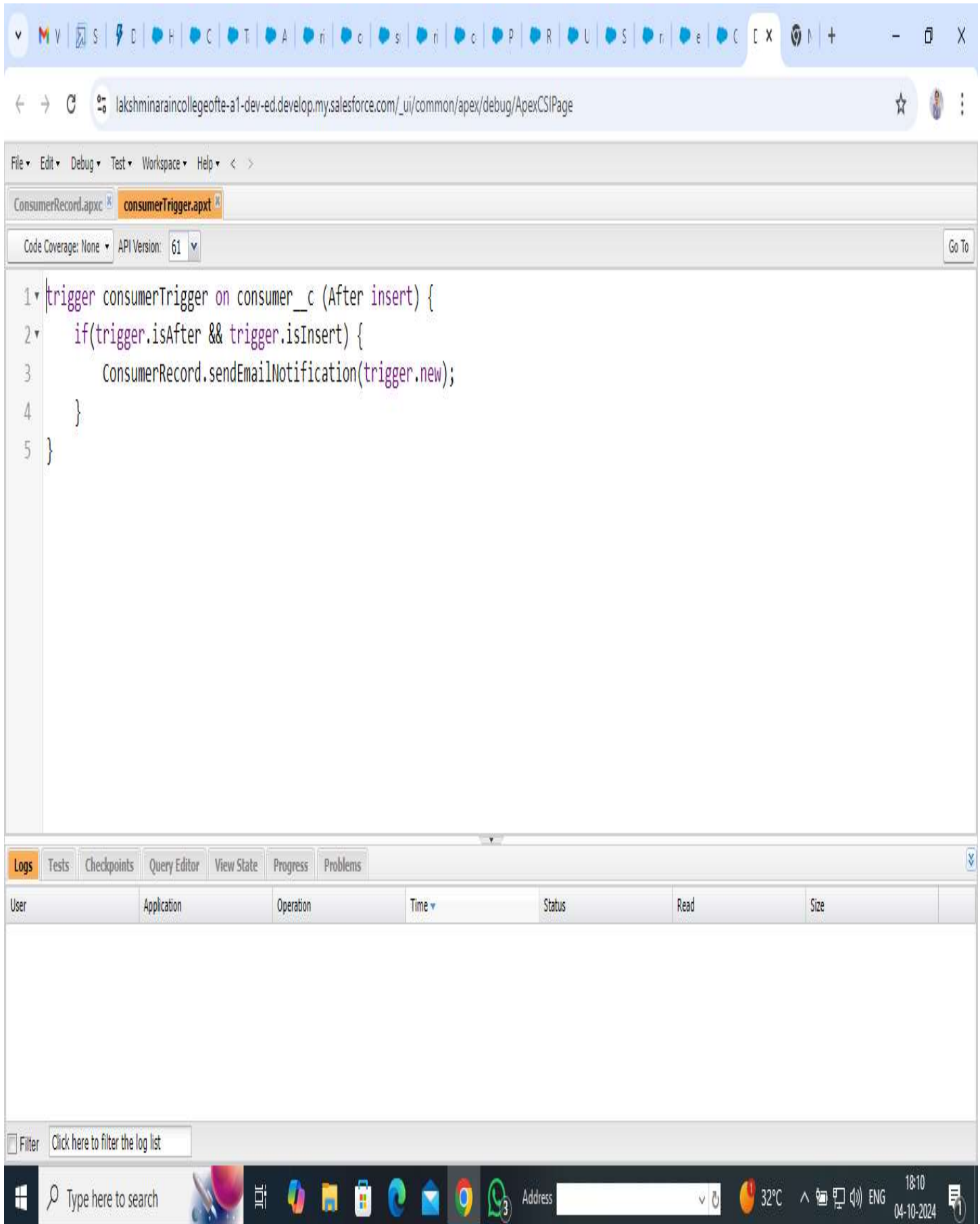
ACTIVITY – 1 Creating an Apex Class(ConsumerRecord)

The screenshot displays the Salesforce IDE interface. The browser window at the top shows the URL: `lakshminaraincollegeofte-a1-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage`. The IDE window has a menu bar (File, Edit, Debug, Test, Workspace, Help) and a toolbar. The editor shows the following Apex code:

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

The IDE interface includes a 'Logs' tab at the bottom, which is currently empty. The status bar at the very bottom shows the Windows taskbar with the search bar, taskbar icons, and system tray information (32°C, 18:10, 04-10-2024).

ACTIVITY – 2 Creating an Apex Trigger



The screenshot displays the Salesforce IDE interface. The browser address bar shows the URL: `lakshminaraincollegeofte-a1-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage`. The IDE window has tabs for `ConsumerRecord.apxc` and `consumerTrigger.apxt`. The `consumerTrigger.apxt` tab is active, showing the following Apex code:

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

Below the code editor, the **Logs** tab is selected, displaying a table with the following columns: User, Application, Operation, Time, Status, Read, and Size. The table is currently empty.

At the bottom of the IDE, there is a **Filter** button and a text input field with the placeholder text "Click here to filter the log list".

The Windows taskbar at the bottom shows the system clock as 18:10 on 04-10-2024, along with various system icons and application shortcuts.