

# A CRM APPLICATION FOR WHOLESALE RICE MILL

**Category: Salesforce:**

## **DESCRIPTION :**

The Rice Mill Customer Relationship Management (CRM) application is an all-in-one system that condenses various reports on the amount of rice produced in a day, the total number of sales made, and their types for distribution to managers every day. It makes use of CRM for improved customer experiences and increased efficiency in mill production activities. The aim of this project is to build an easy-to-use application that meets the requirements inherent in milling industry.

## **INTRODUCTION TO SALESFORCE**

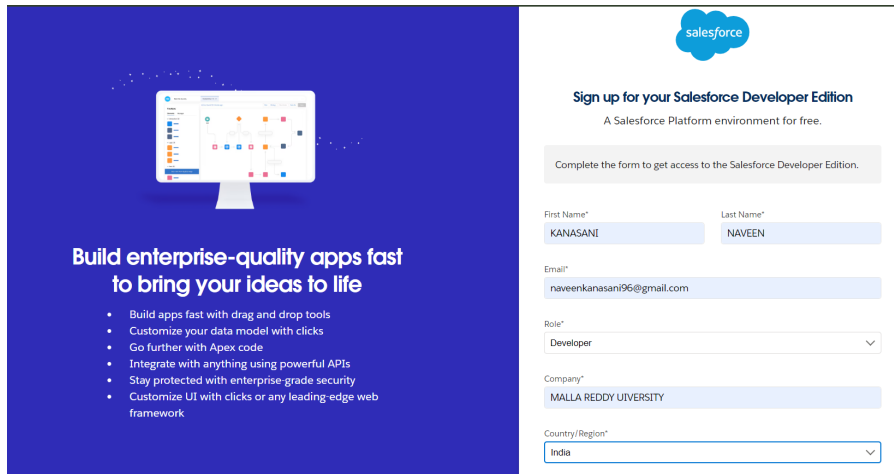
Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has got everything you need to run your business from anywhere. With its standard products and features, you can relate with prospects and clients as well as work with employees and partners in a joint manner. The company also offers a cloud data storage system that guarantees the security of your files.

### **Activity 1: Creating Developer Account:**

Creating a developer org in salesforce.

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



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- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

**Sign up for your Salesforce Developer Edition**  
A Salesforce Platform environment for free.

Complete the form to get access to the Salesforce Developer Edition.

First Name\* KANASANI Last Name\* NAVEEN

Email\* naveenkanasani96@gmail.com

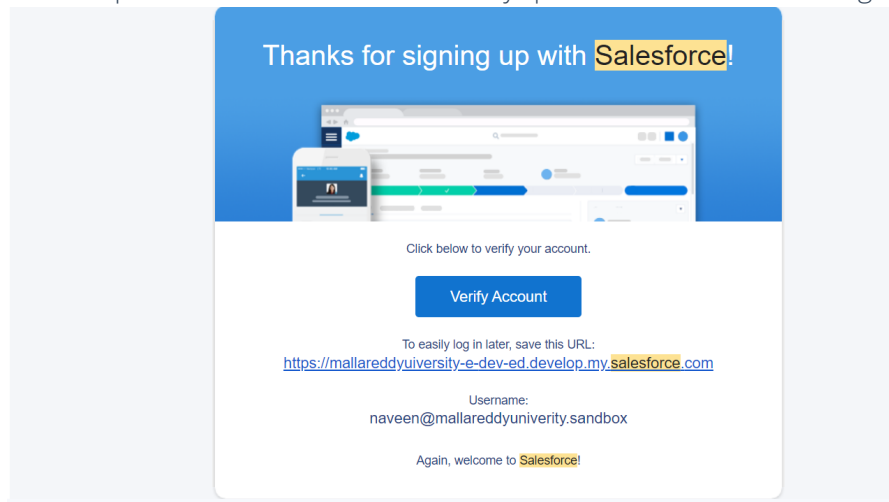
Role\* Developer

Company\* MALLA REDDY UNIVERSITY

Country/Region\* India

## STEP:2

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



## OBJECT

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

### Salesforce objects are of two types:

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

### To Navigate to Setup page:

Click on gear icon → click setup.

### To create an object:

1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
2. On Custom object defining page:
3. Enter the label name, plural label name, click on Allow reports, Allow search.
4. Click on Save.

### Activity 1: Create Supplier Object:

The screenshot shows the Salesforce Setup interface for the 'supplier' object. The top navigation bar includes the Setup icon, a search bar, and various utility icons. The left sidebar shows the 'Object Manager' menu with options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the 'Details' for the 'supplier' object. The 'Details' section includes fields for Description, API Name (supplier\_\_c), Custom (checked), Singular Label (supplier), Plural Label (suppliers), Enable Reports (checked), Track Activities, Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). There are 'Edit' and 'Delete' buttons in the top right corner of the details section.

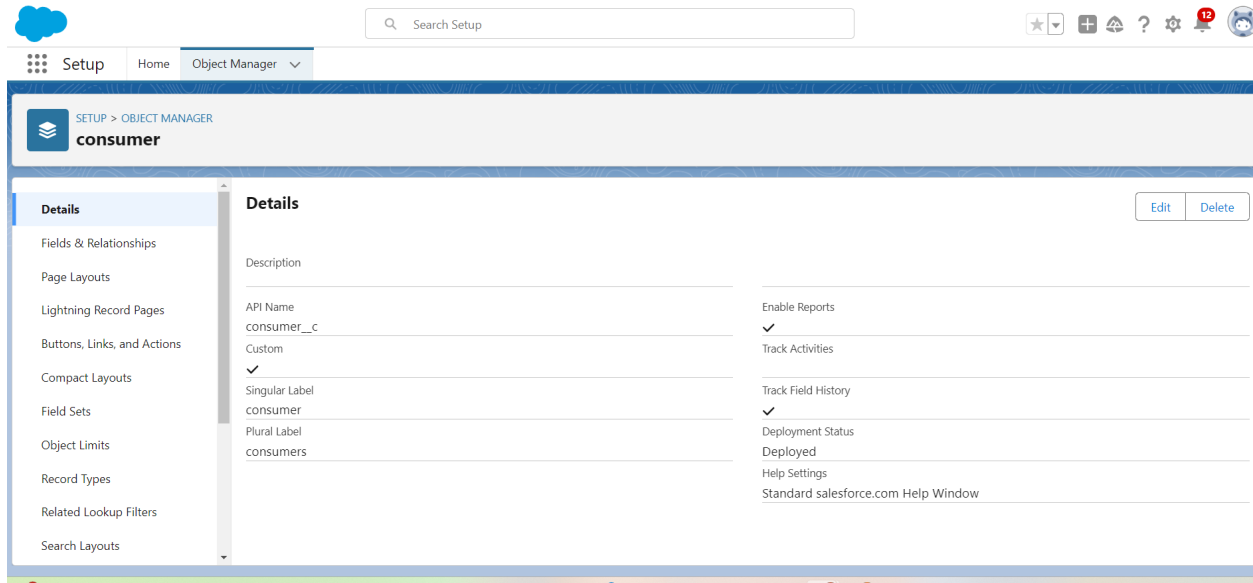
Field	Value
Description	
API Name	supplier__c
Custom	✓
Singular Label	supplier
Plural Label	suppliers
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

### Activity 2: Create Rice mill Object:

The screenshot shows the Salesforce Setup interface for the 'rice mill' object. The top navigation bar includes the Setup icon, a search bar, and various utility icons. The left sidebar shows the 'Object Manager' menu with options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the 'Details' for the 'rice mill' object. The 'Details' section includes fields for Description, API Name (rice\_mill\_\_c), Custom (checked), Singular Label (rice mill), Plural Label (rice mills), Enable Reports (checked), Track Activities, Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). There are 'Edit' and 'Delete' buttons in the top right corner of the details section.

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

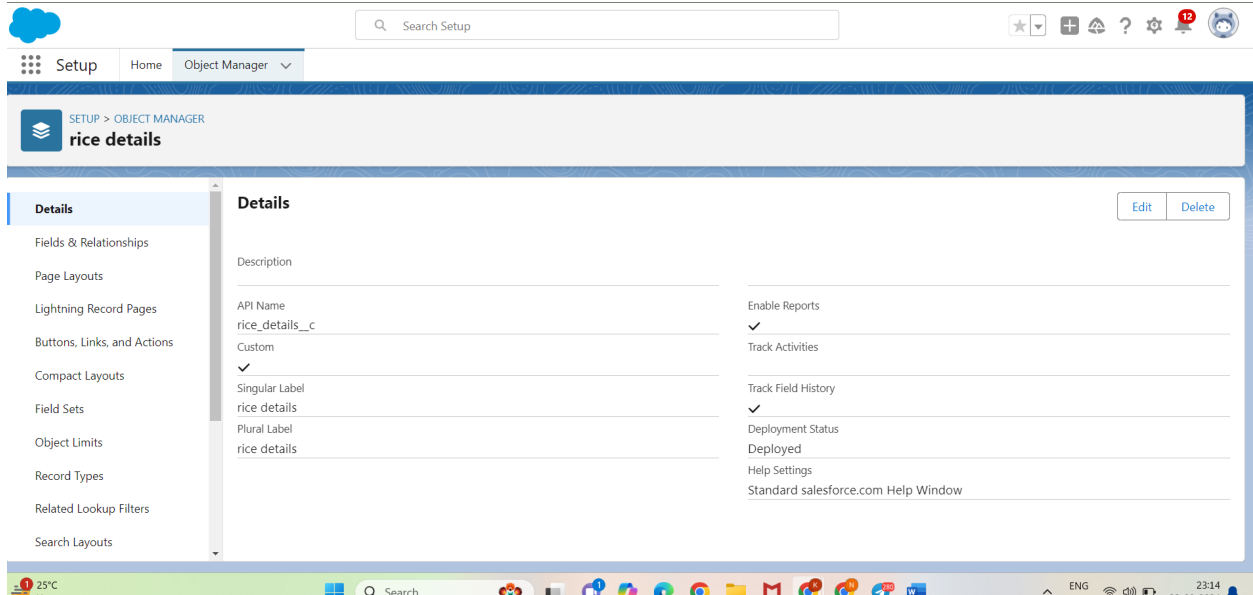
### Activity 3: Create consumer Objects:



The screenshot shows the Salesforce Setup interface for the 'consumer' object. 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 Search Layouts. The main content area is titled 'Details' and includes a description field, API Name (consumer\_\_c), Custom checkbox, Singular Label (consumer), Plural Label (consumers), Enable Reports (checked), Track Activities, Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Edit and Delete buttons are in the top right.

Field	Value
Description	
API Name	consumer__c
Custom	<input checked="" type="checkbox"/>
Singular Label	consumer
Plural Label	consumers
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	
Track Field History	<input checked="" type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

### Activity 4: Create rice details Objects:



The screenshot shows the Salesforce Setup interface for the 'rice details' object. 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 Search Layouts. The main content area is titled 'Details' and includes a description field, API Name (rice\_details\_\_c), Custom checkbox, Singular Label (rice details), Plural Label (rice details), Enable Reports (checked), Track Activities, Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Edit and Delete buttons are in the top right.


Field	Value
Description	
API Name	rice_details__c
Custom	<input checked="" type="checkbox"/>
Singular Label	rice details
Plural Label	rice details
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	
Track Field History	<input checked="" type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

## TABS

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

### Activity 1: Creating a Custom Tab

### Activity 2: Creating Remaining Tabs



SETUP

Tabs

## 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

New

What Is This?

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	consumers	Chess piece	
<a href="#">Edit</a>   <a href="#">Del</a>	rice details	CD/DVD	
<a href="#">Edit</a>   <a href="#">Del</a>	rice mills	Compass	
<a href="#">Edit</a>   <a href="#">Del</a>	suppliers	Bank	

## THE LIGHTNING APP

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

### Activity 1: Create a Lightning App

My files - OneDrive

ind56.stdc-y37hzm...

Processing complete


All | suppliers | Sales

Student - Skill Wallet

SI-4019-1723359036

(7) Orange Mov...

[Gmail](#)
[YouTube](#)
[Maps](#)



Search...

★

+

?

⚙

12

👤

MY RICE

suppliers

rice details

rice mills

consumers

Dashboards

\* range of amount per day

suppliers

All

New

Import

Change Owner

Printable View

Assign Label

0 items

Sorted by supplier Name

Filtered by All suppliers

Updated a few seconds ago

Search this list...

⚙

📄

🔄

✎

🗑

🔍

supplier Name ↑

Lightning App Builder

App Settings

Pages

MY RICE

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

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

Accounts

All Sites

Alternative Payment Methods

Analytics

App Launcher

Appointment Categories

Appointment Invitations

Approval Requests

Asset Action Sources

Asset Actions

Asset State Periods

Assets

Selected Items

suppliers

ricemills

rice details

consumers

## FIELDS

When we talk about Salesforce, Fields represent the data stored in the columns of a relational

database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

### Activity 1: Creating the number field in rice details object

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options. The main content area is titled 'rice details Custom Field' and 'rice distributed'. It displays the 'Custom Field Definition Detail' for a custom field named 'rice distributed'. The field is of type 'Number' and is associated with the 'rice\_details' object. The 'Field Information' section shows the field label, name, API name, description, help text, data owner, field usage, data sensitivity level, and compliance categorization. The 'Created By' and 'Modified By' fields are both set to 'KANASANI NAVEEN'.

Field Information	
Field Label	rice distributed
Field Name	rice_distributed
API Name	rice_distributed__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	KANASANI NAVEEN 10/08/2024, 10:39 pm
Modified By	KANASANI NAVEEN 10/08/2024, 10:39 pm

### Activity 2 : Creating Junction Object :

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options. The main content area is titled 'rice details Custom Field' and 'supplier Name'. It displays the 'Custom Field Definition Detail' for a custom field named 'supplier Name'. The field is of type 'Master-Detail' and is associated with the 'rice\_details' object. The 'Field Information' section shows the field label, name, API name, description, help text, data owner, field usage, data sensitivity level, and compliance categorization. The 'Created By' and 'Modified By' fields are both set to 'KANASANI NAVEEN'. Below the field information, the 'Master-Detail Options' section shows the 'Related To' field set to 'supplier' and the 'Child Relationship Name' set to 'rice\_details'.

Field Information	
Field Label	supplier Name
Field Name	supplier_Name
API Name	supplier_Name__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	KANASANI NAVEEN 10/08/2024, 10:42 pm
Modified By	KANASANI NAVEEN 10/08/2024, 10:42 pm

Master-Detail Options	
Related To	supplier
Child Relationship Name	rice_details

### Activity 3 : Creating a Master-Detail Relationship

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options. The main content area is titled 'rice details Custom Field' and 'rice mill 1(one)'. It displays the 'Custom Field Definition Detail' for a custom field named 'rice mill 1(one)'. The field is of type 'Master-Detail' and is associated with the 'rice\_details' object. The 'Field Information' section shows the field label, name, API name, description, help text, data owner, field usage, data sensitivity level, and compliance categorization. The 'Created By' and 'Modified By' fields are both set to 'KANASANI NAVEEN'.

Field Information	
Field Label	rice mill 1(one)
Field Name	rice_mill_1_one
API Name	rice_mill_1_one__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	KANASANI NAVEEN 10/08/2024, 10:43 pm
Modified By	KANASANI NAVEEN 10/08/2024, 10:43 pm

Activity 4 : Creating the Roll-up Summary

Setup

Home

Object Manager

Setup > OBJECT MANAGER

supplier

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

supplier Custom Field

sum of rice distributed

Back to supplier

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label

sum of rice distributed

Object Name

supplier

Field Name

sum\_of\_rice\_distributed

API Name

sum\_of\_rice\_distributed\_\_c

Description

Help Text

Data Owner

Field Usage

Data Sensitivity Level

Compliance Categorization

Created By

KANASANI NAVEEN

10/08/2024, 10:47 pm

Modified By

KANASANI NAVEEN

10/08/2024, 10:47 pm

Roll-Up Summary Options

Data Type

Roll-Up Summary

Summary Type

SUM

Setup > OBJECT MANAGER

rice mill

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

rice mill Custom Field

rice distributed to shops

Back to rice mill

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label

rice distributed to shops

Object Name

rice mill

Field Name

rice\_distributed\_to\_shops

API Name

rice\_distributed\_to\_shops\_\_c

Description

Help Text

Data Owner

Field Usage

Data Sensitivity Level

Compliance Categorization

Created By

KANASANI NAVEEN

10/08/2024, 10:57 pm

Modified By

KANASANI NAVEEN

10/08/2024, 10:57 pm

Roll-Up Summary Options

Data Type

Roll-Up Summary

Summary Type

SUM

Setup

Home

Object Manager

Setup > OBJECT MANAGER

rice mill

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

rice mill Custom Field

rice taken

Back to rice mill

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label

rice taken

Object Name

rice mill

Field Name

rice\_taken

API Name

rice\_taken\_\_c

Description

Help Text

Data Owner

Field Usage

Data Sensitivity Level

Compliance Categorization

Created By

KANASANI NAVEEN

10/08/2024, 11:00 pm

Modified By

KANASANI NAVEEN

10/08/2024, 11:29 pm

Roll-Up Summary Options

Data Type

Roll-Up Summary

Summary Type

SUM

Activity 5 : Creating Fields in Objects  
Creating the number field in rice details object

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

rice details

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Fields & Relationships

6 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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_Name__c	Master-Detail(supplier)		✓

## Activity 6: Creating Fields in rice mill Objects

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

rice mill

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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

## Activity 7: Creating Fields in consumer Objects



Setup

Home

Object Manager

Setup > OBJECT MANAGER

consumer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Fields & Relationships

14 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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(50)	
Last Modified By	LastModifiedById	Lookup(User)	
Last name	Last_name__c	Text(50)	

## Activity 8 : Creating Cross Object Formula Field in consumer Object

Setup

Home

Object Manager

Setup > OBJECT MANAGER

consumer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

consumer Custom Field

Amount Paid

Back to consumer

Help for this Page

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Amount Paid	Object Name	consumer
Field Name	Amount_Paid		
API Name	Amount_Paid__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KANASANI NAVEEN, 10/08/2024, 11:18 pm	Modified By	KANASANI NAVEEN, 10/08/2024, 11:18 pm

Setup

Home

Object Manager

Setup > OBJECT MANAGER

consumer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

consumer Custom Field

Consumer Name

Back to consumer

Help for this Page

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Consumer Name	Object Name	consumer
Field Name	Consumer_Name		
API Name	Consumer_Name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KANASANI NAVEEN, 10/08/2024, 11:20 pm	Modified By	KANASANI NAVEEN, 10/08/2024, 11:20 pm

## Activity 9 : Creating the validation rule

SETUP > OBJECT MANAGER

consumer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

consumer Validation Rule

Back to consumer

Validation Rule Detail

Edit

Clone

Rule Name

Phonenumberemailblankrule

Active

✓

Error Condition Formula

OR( ISBLANK( Phone\_number\_\_c ) , ISBLANK( email\_\_c ) )

Error Location

Top of Page

Error Message

please fill in your phone number

Description

phone number and email number should not be blank

Created By

KANASANI NAVEEN 10/08/2024, 11 22 pm

Modified By

KANASANI NAVEEN 10/08/2024, 11 22 pm

Edit

Clone

Help for this Page

## PAGE LAYOUTS

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

### Activity 1 : creating the page layout

SETUP > OBJECT MANAGER

consumer

Setup

Home

Object Manager

Save

Quick Save

Preview As...

Cancel

Undo

Redo

Layout Properties

Quick Find

Field Name

×

Fields

Section

Blank Space

consumer Name

Created By

email

Consumer Name

Last Modified By

Last name

Mode of payment

Phone number

rice mill name

Rice taken by shops

rice taken by sho...

Rice type

consumer Detail

Edit

Delete

Clone

Change Owner

Change Record Type

Printable View

Edit Labels

rice details

Rice type

Sample Text

Rice taken by shops

862

Personal details

First name

Sample Text

Last name

Sample Text

Phone number

1-415-555-1212

consumer Name

GEN-2004-001234

email

sarah.sample@company.com

## PROFILES

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

### Activity 1: owner Profile

Setup

Home

Object Manager

Search Setup

12

pro

Hyperforce Assistant

Users

Profiles

Data

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

SETUP

Profiles

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail

EditCloneDeleteView Users

Name	worker	Custom Profile	✓
User License	Salesforce Platform		
Description			
Created By	KANASANI NAVEEN 10/08/2024, 11:55 pm	Modified By	KANASANI NAVEEN 10/08/2024, 11:55 pm

Page Layouts

Standard Object Layouts		Lead	Lead Layout [ View Assignment ]
Global	Global Layout [ View Assignment ]	Location	Location Layout [ View Assignment ]
Email Application	Not Assigned [ View Assignment ]	Location Group	Location Group Layout [ View Assignment ]
Home Page Layout	Home Page Default [ View Assignment ]		

Activity 2: employer Profile

Setup

Home

Object Manager

Search Setup

12

pro

Hyperforce Assistant

Users

Profiles

Data

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

SETUP

Profiles

Profile Detail

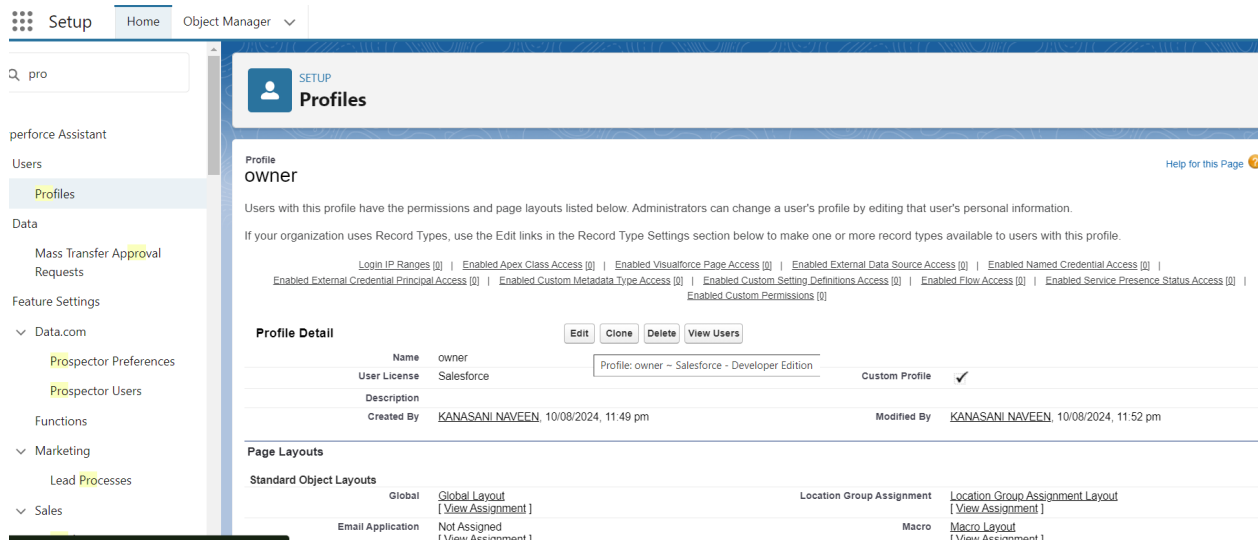
EditCloneDeleteView Users

Name	employer	Custom Profile	✓
User License	Salesforce Platform		
Description			
Created By	KANASANI NAVEEN 10/08/2024, 11:53 pm	Modified By	KANASANI NAVEEN 10/08/2024, 11:54 pm

Page Layouts

Standard Object Layouts		Lead	Lead Layout [ View Assignment ]
Global	Global Layout [ View Assignment ]	Location	Location Layout [ View Assignment ]
Email Application	Not Assigned [ View Assignment ]	Location Group	Location Group Layout [ View Assignment ]
Home Page Layout	Home Page Default [ View Assignment ]	Location Group Assignment	Location Group Assignment Layout [ View Assignment ]
Account	Account Layout [ View Assignment ]	Object Milestone Layout	Object Milestone Layout [ View Assignment ]
Alternative Payment Method	Alternative Payment Method Layout [ View Assignment ]	Operating Hours	Operating Hours Layout [ View Assignment ]
Appointment Invitation	Appointment Invitation Layout [ View Assignment ]	Order	Order Layout [ View Assignment ]
Asset	Asset Layout [ View Assignment ]	Order Product	Order Product Layout [ View Assignment ]
Asset Relationship	Asset Relationship Layout [ View Assignment ]		

Activity 3: owner Profile



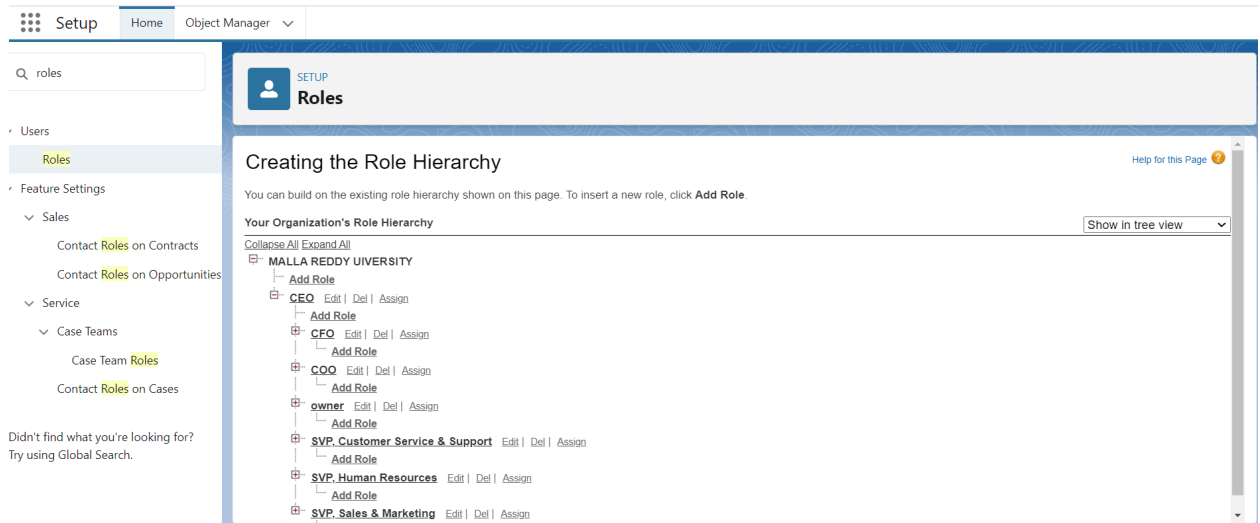
The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains navigation links for Setup, Home, Object Manager, and a search bar. The main content area is titled 'Profiles' and shows the 'owner' profile. It includes a list of enabled permissions (Login IP Ranges, Apex Class Access, Visualforce Page Access, External Data Source Access, Named Credential Access, External Credential Principal Access, Custom Metadata Type Access, Custom Setting Definitions Access, Flow Access, Service Presence Status Access, Custom Permissions) and a 'Profile Detail' section with fields for Name, User License, Description, Created By, and Modified By. Below this is a 'Page Layouts' section showing standard object layouts for Global, Location Group Assignment, Email Application, and Macro.

## ROLE & ROLE HIERARCHY

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

### Activity 1: Creating owner Role

### Activity 2: Creating employer roles



The screenshot shows the Salesforce Setup interface for the 'Roles' section. The left sidebar contains navigation links for Setup, Home, Object Manager, and a search bar. The main content area is titled 'Roles' and shows the 'Creating the Role Hierarchy' page. It includes a 'Your Organization's Role Hierarchy' section with a tree view showing the hierarchy of roles: MALLA REDDY UNIVERSITY, CEO, CFO, COO, owner, SVP\_Customer Service & Support, SVP\_Human Resources, and SVP\_Sales & Marketing. Each role has an 'Add Role' button and links for 'Edit', 'Del', and 'Assign'.

## USERS

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

### Activity 1: Create User

Setup

Home

Object Manager

Search Setup

Star

Plus

Share

Help

Settings

12

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

SETUP

Users

User

KANASANI NAVEEN

Permission Set Assignments (1) | 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 (1) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (10+) | User Provisioning Accounts (0)

User Detail

Edit

Sharing

Change Password

View Summary

Name	KANASANI NAVEEN	Role	
Alias	KNAVE	User License	Salesforce
Email	naveenkanasani96@gmail.com [Verified]	Profile	System Administrator
Username	naveen@mailareddyuniversity sandbox	Active	<input checked="" type="checkbox"/>
Nickname	naveen	Marketing User	<input checked="" type="checkbox"/>
Title		Offline User	<input checked="" type="checkbox"/>
Company	MALLA REDDY UNIVERSITY	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input checked="" type="checkbox"/>
Address	IN	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"/>

## Activity 2: creating another users

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

SETUP

Users

User

ragu ragu

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 (1+) | User Provisioning Accounts (0)

User Detail

Edit

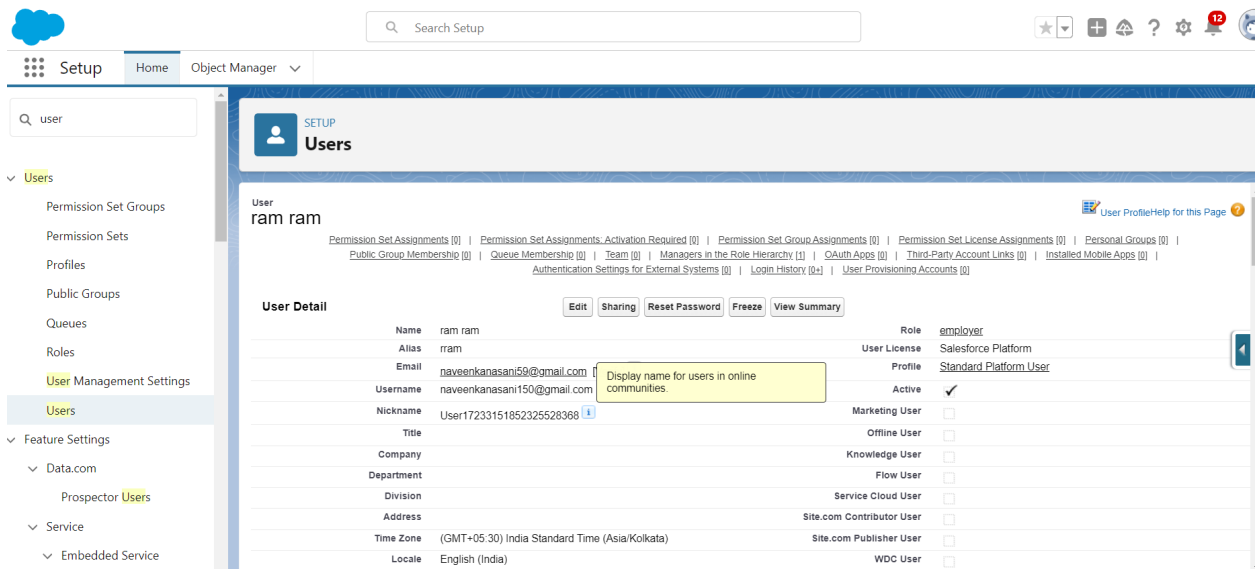
Sharing

Reset Password

Freeze

View Summary

Name	ragu ragu	Role	worker
Alias	rragu	User License	Salesforce Platform
Email	2111cs040059@mailareddyuniversity.ac.in [Verified]	Profile	Standard Platform User
Username	2111cs040150@mailareddyuniversity.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	User17233152817324037566	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"/>

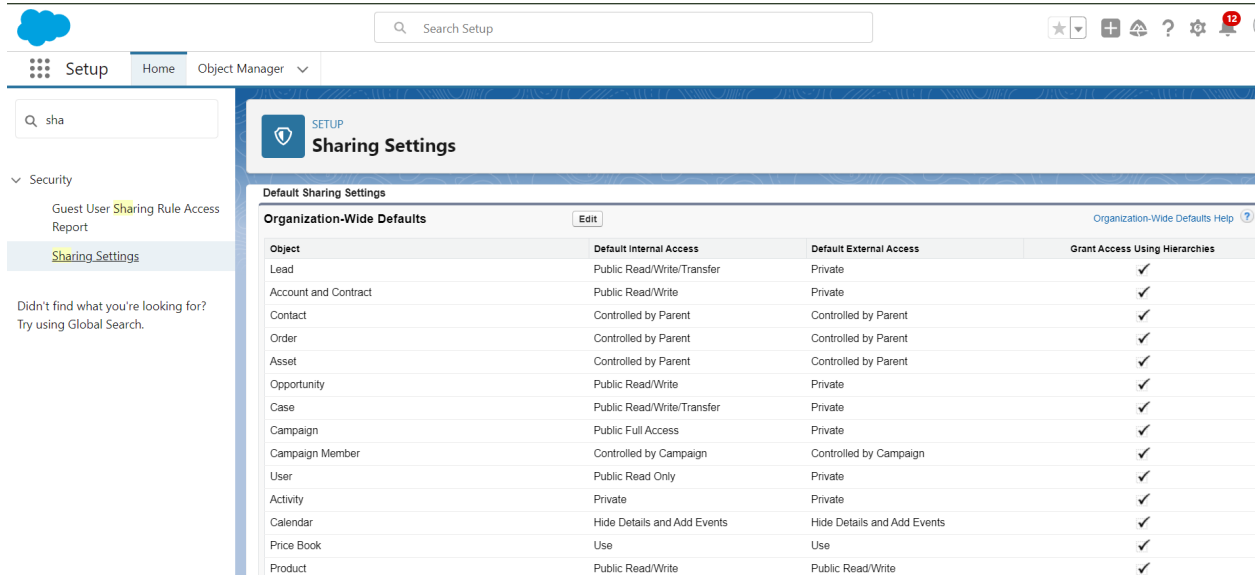


The screenshot shows the Salesforce Setup interface with the 'Users' section selected in the left sidebar. The main content area displays the 'User Detail' for a user named 'ram ram'. The user's email is 'naveenkanasan150@gmail.com' and their username is 'naveenkanasan150@gmail.com'. A yellow callout box highlights the email field with the text 'Display name for users in online communities.' The user's role is 'employer' and their profile is 'Standard Platform User'. The user is active, and various checkboxes for permissions are visible on the right side of the page.

## PERMISSION SETS

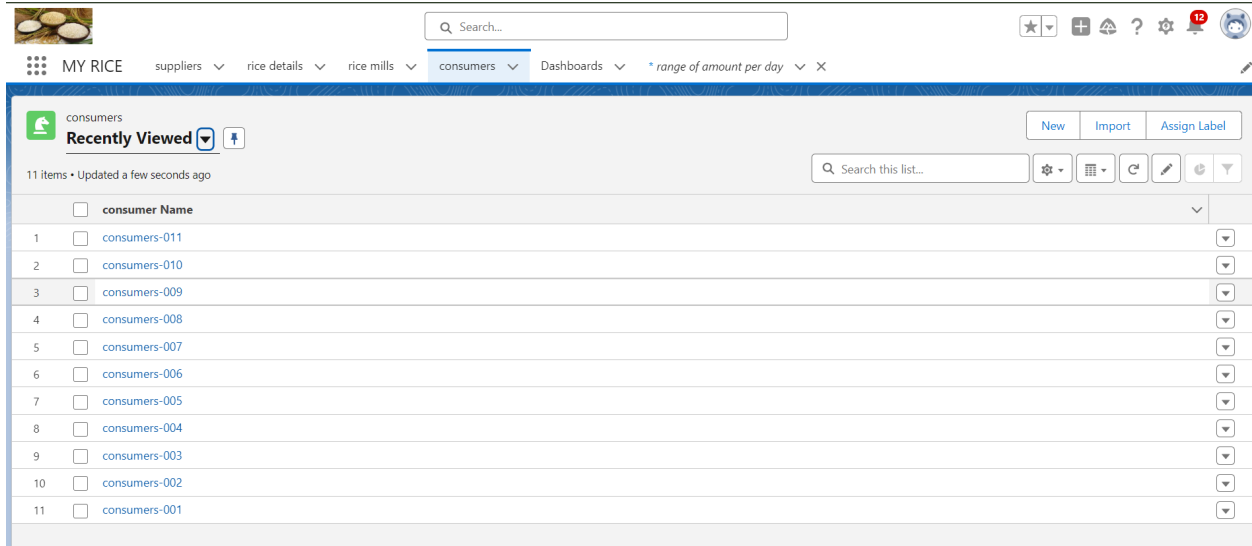
A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles and are the recommended way to manage your users' permissions.

### Activity 1: Creating OWD setting.



The screenshot shows the Salesforce Setup interface with the 'Sharing Settings' section selected in the left sidebar. The main content area displays the 'Default Sharing Settings' for the organization. The table below shows the default internal and external access settings for various objects, along with a checkbox for 'Grant Access Using Hierarchies'.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Public Read/Write	Private	<input checked="" type="checkbox"/>
Case	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Campaign	Public Full Access	Private	<input checked="" type="checkbox"/>
Campaign Member	Controlled by Campaign	Controlled by Campaign	<input checked="" type="checkbox"/>
User	Public Read Only	Private	<input checked="" type="checkbox"/>
Activity	Private	Private	<input checked="" type="checkbox"/>
Calendar	Hide Details and Add Events	Hide Details and Add Events	<input checked="" type="checkbox"/>
Price Book	Use	Use	<input checked="" type="checkbox"/>
Product	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>

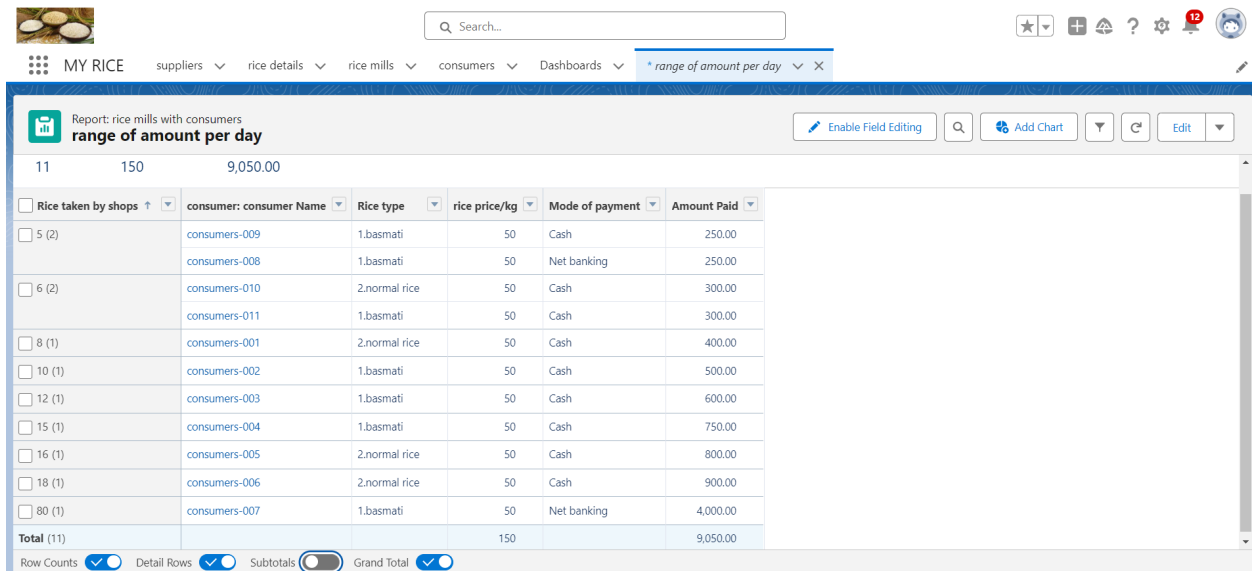


	consumer Name
1	consumers-011
2	consumers-010
3	consumers-009
4	consumers-008
5	consumers-007
6	consumers-006
7	consumers-005
8	consumers-004
9	consumers-003
10	consumers-002
11	consumers-001

## REPORTS

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics. In Salesforce.com we can easily generate reports in different styles. And can create reports in a very short time and also schedule the reports. Salesforce provides a powerful suit of analytic tools to help you organize, view and analyze your data.

### Activity 1: Create Report



	consumer: consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
5 (2)	consumers-009	1.basmati	50	Cash	250.00
	consumers-008	1.basmati	50	Net banking	250.00
6 (2)	consumers-010	2.normal rice	50	Cash	300.00
	consumers-011	1.basmati	50	Cash	300.00
8 (1)	consumers-001	2.normal rice	50	Cash	400.00
10 (1)	consumers-002	1.basmati	50	Cash	500.00
12 (1)	consumers-003	1.basmati	50	Cash	600.00
15 (1)	consumers-004	1.basmati	50	Cash	750.00
16 (1)	consumers-005	2.normal rice	50	Cash	800.00
18 (1)	consumers-006	2.normal rice	50	Cash	900.00
80 (1)	consumers-007	1.basmati	50	Net banking	4,000.00
<b>Total (11)</b>			<b>150</b>		<b>9,050.00</b>

### Activity 2: Sharing report to owner

The image shows a web application interface with two main components: an 'Edit Subscription' dialog box and a 'Dashboards' table.

**Edit Subscription Dialog:**

- Title:** Edit Subscription
- Time:** 8:00 am
- Attachment:** Attach File
- Recipients:** Send email to Me, Edit Recipients
- Run Report As:** Me (selected), Another Person (selected)
- Another Person:** KANASANI NAVEEN
- Buttons:** Unsubscribe, Cancel, Save

**Dashboards Table:**

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	estimated data	total amount of data in dashboards	amount data dashboard	KANASANI NAVEEN	11/8/2024, 12:03 pm	

The table also includes a sidebar with filters: Recent (1 item), Created by Me, Private Dashboards, All Dashboards, FOLDERS, All Folders, Created by Me, and Shared with Me. A context menu for the 'estimated data' row includes options: View, Edit, Subscribe, Delete, Favorite (highlighted), Change Owner, and Move.


## DASHBOARDS

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

### Activity 1: Create Dashboard Folder

### Activity 2: Create Dashboard





★

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⚙️

12

👤

MY RICE

suppliers

rice details

rice mills

consumers

Dashboards

\* range of amount per day

Dashboards

Recent

1 item

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	KANASANI NAVEEN	11/8/2024, 12:03 pm	<div></div>
Created by Me						
Private Dashboards						
All Dashboards						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

Gmail

YouTube

Maps



★

+

🔍

?

⚙️

12

👤

MY RICE

suppliers

rice details

rice mills

consumers

Dashboards

Dashboard

estimated data

total amount of data in dashboards

Last refreshed 11 days ago. Refresh this dashboard to see the latest data.

As of 11-Aug-2024, 12:08 pm Viewing as KANASANI NAVEEN

Refresh Edit Subscribe

range of amount per day

Sum of Amount Paid

4k

3k

2k

1k

0

500 600 400 500 600 750 800 900 4k

5 6 8 10 12 15 16 18 80

Rice taken by shops

View Report (range of amount per day)

range of amount per day

Sum of Amount Paid

9.1k

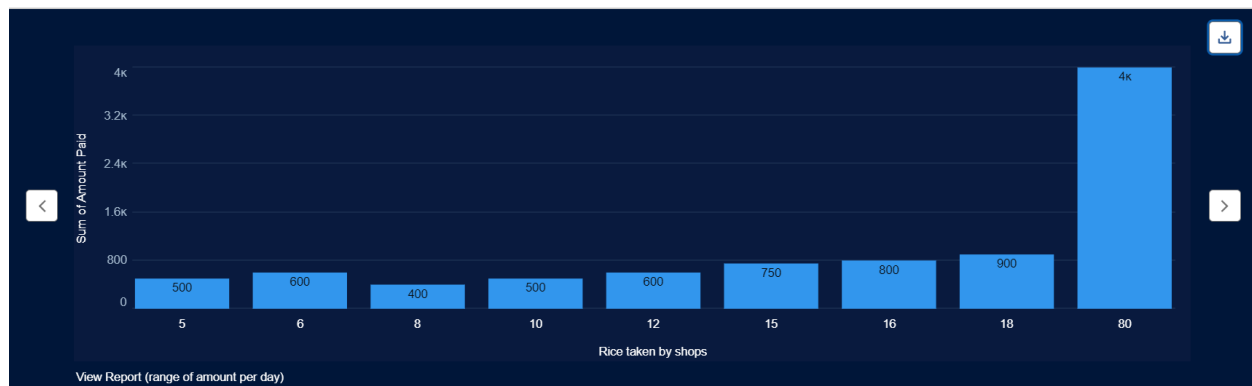
Sum of Amount Paid

Rice taken by shops

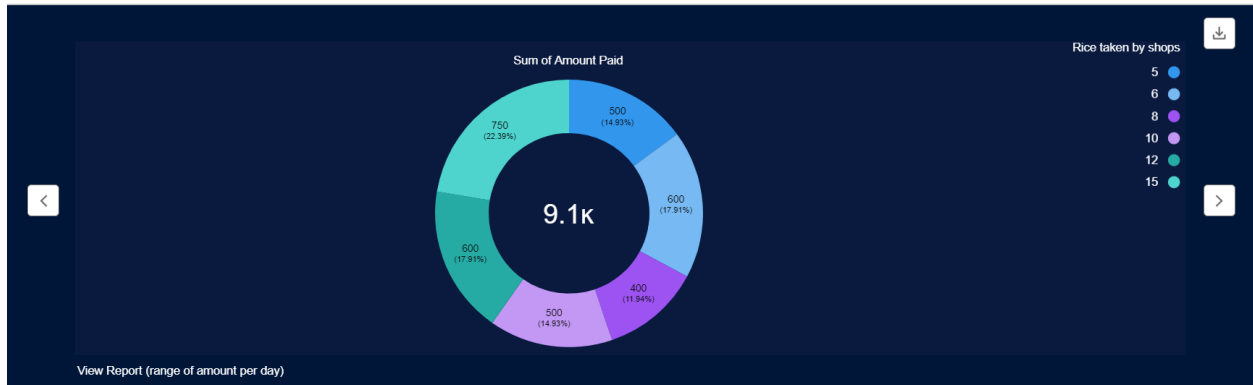
5 6 8 10 12 15

View Report (range of amount per day)

range of amount per day



range of amount per day



PROJECT DONE

BY

KANASANI NAVEEN

