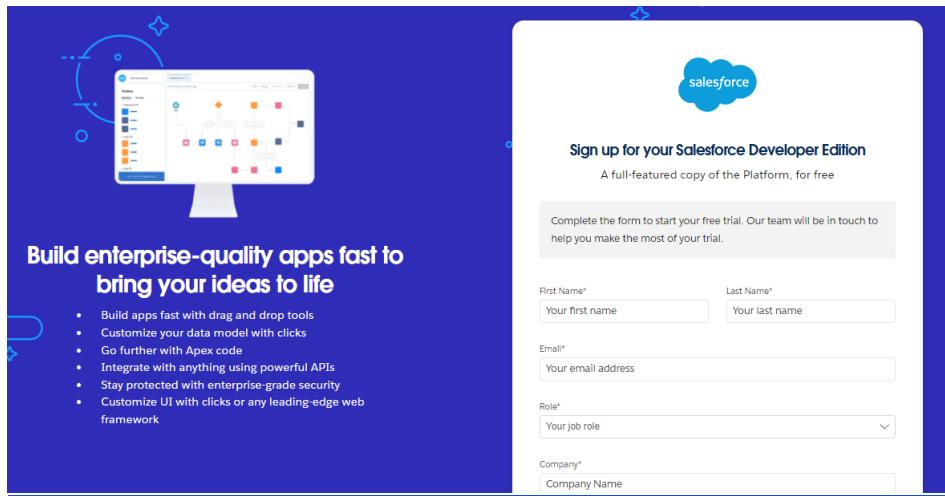


# A CRM APPLICATION FOR WHOLESALE RICE MILL

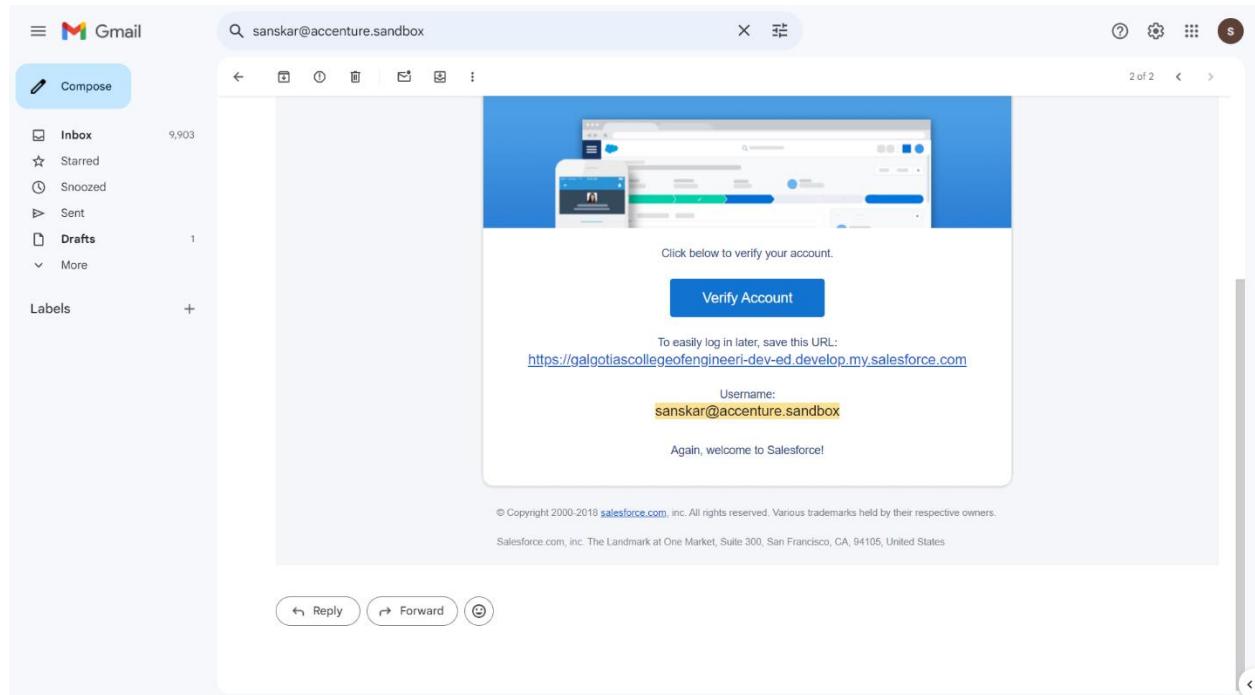
## Milestones and Activities:

### Milestone 1-Salesforce :

#### Activity 1: Creating Developer Account:



#### Activity 2: Account Activation:



The screenshot shows the Salesforce Setup Home page. The left sidebar includes links for Setup Home, Service Setup Assistant, Commerce Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, Administration (Users, Data, Email), and Platform Tools (Subscription Management, Apps, Feature Settings, Slack, Heroku). The main content area features three cards: 'Get Started with Einstein Bots' (Launch an AI-powered bot to automate your digital connections), 'Mobile Publisher' (Use the Mobile Publisher to create your own branded mobile app), and 'Real-time Collaborative Docs' (Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce). Below these cards is a section titled 'Most Recently Used' with a table showing 10 items: Sanskar Chhaparia (User), consumer (Custom Object Definition), consumer 1 (Record Type), and Partner App Subscription User (Profile).

## Milestone 2- Object

### Supplier object

The screenshot shows the Salesforce Object Manager interface for the 'supplier' object. The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main 'Details' tab displays the following information:

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

Buttons at the top right include 'Edit' and 'Delete'. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar.

### Rice mill object

The screenshot shows the Salesforce Object Manager interface for the 'rice mill' object. The left sidebar lists the same configuration options as the Supplier object. The main 'Details' tab displays the following information:

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

Buttons at the top right include 'Edit' and 'Delete'. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar.

## Consumer object

The screenshot shows the Salesforce Object Manager interface for the 'consumer' object. The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main 'Details' tab displays the following information:

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

At the top right of the main area are 'Edit' and 'Delete' buttons.

## Rice Details Object

The screenshot shows the Salesforce Object Manager interface for the 'rice details' object. The left sidebar lists the same configuration options as the Consumer object. The main 'Details' tab displays the following information:

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

At the top right of the main area are 'Edit' and 'Delete' buttons.

## Milestone 3- Tabs

### Supplier Tab

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'User Interface' > 'Tabs', there is a link to 'Tabs'. A search bar at the top right contains the text 'Search Setup'. The main content area displays a 'Custom Tab Definition Detail' page for a tab named 'supplier'. The tab label is 'supplier', the object is 'supplier', and the tab style is 'Box'. The tab was created by 'Sanskar Chhaparia' on 26/06/2024, 9:35 pm, and modified by the same user on 26/06/2024, 9:36 pm.

### Rice mills tab

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'User Interface' > 'Tabs', there is a link to 'Tabs'. A search bar at the top right contains the text 'Search Setup'. The main content area displays a 'Custom Tab Definition Detail' page for a tab named 'rice mills'. The tab label is 'rice mills', the object is 'rice mill', and the tab style is 'Box'. The tab was created by 'Sanskar Chhaparia' on 26/06/2024, 9:37 pm, and modified by the same user on 26/06/2024, 9:37 pm.

## Rice details Tabs

The screenshot shows the Salesforce Setup interface under the 'User Interface' section, specifically the 'Tabs' page. A new custom object tab named 'rice details' has been created. The tab is defined for the 'rice details' object and is styled as a 'Box'. It was created by Sanskar Chhaparia on June 26, 2024, at 9:37 PM.

Custom Tab Definition Detail

Tab Label	rice details	Object	rice details	Tab Style	Box
Description				Splash Page Custom Link	
Created By	Sanskar Chhaparia	26/06/2024, 9:37 pm		Modified By	Sanskar Chhaparia 26/06/2024, 9:37 pm

## Consumer tabs

The screenshot shows the Salesforce Setup interface under the 'User Interface' section, specifically the 'Tabs' page. A new custom object tab named 'consumers' has been created. The tab is defined for the 'consumer' object and is styled as a 'Box'. It was created by Sanskar Chhaparia on June 26, 2024, at 9:37 PM.

Custom Tab Definition Detail

Tab Label	consumers	Object	consumer	Tab Style	Box
Description				Splash Page Custom Link	
Created By	Sanskar Chhaparia	26/06/2024, 9:37 pm		Modified By	Sanskar Chhaparia 26/06/2024, 9:37 pm

## **Milestone 4- 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.

### App details

The screenshot shows the Lightning App Builder interface with the following details:

- App Settings:** A sidebar menu with options: App Options, Utility Items (Desktop Only), Navigation Items, and User Profiles.
- App Details & Branding:** The active tab, showing the following fields:
  - App Details:** App Name: MY RICE, Developer Name: MY\_RICE.
  - App Branding:** Primary Color Hex Value: #0070D2. It includes a color picker and a preview image of a blue object.
  - Description:** Enter a description... (placeholder text).
  - Org Theme Options:** A checkbox labeled "Use the app's image and color instead of the org's custom theme".
  - App Launcher Preview:** A preview window showing a small image of the app icon and the text "MY RICE".

Lightning App Builder App Settings Pages MY RICE ? Help

**App Settings**

App Details & Branding

**App Options**

Utility Items (Desktop Only)

Navigation Items

User Profiles

**App Options**

App Options

**Navigation and Form Factor**

\* Navigation Style

Standard navigation

Console navigation

\* Supported Form Factors

Desktop and phone

Desktop

Phone

**Setup and Personalization**

Setup Experience

Setup (full set of Setup options)

Service Setup

**App Personalization Settings**

Disable end user personalization of nav items in this app

Disable temporary tabs for items outside of this app

Use Omni-Channel sidebar

## App options

Lightning App Builder App Settings Pages MY RICE ? Help

**App Settings**

App Details & Branding

App Options

**Utility Items (Desktop Only)**

Navigation Items

User Profiles

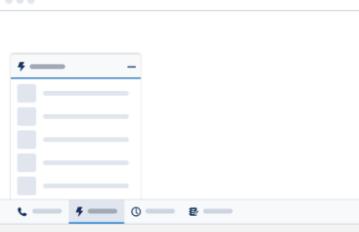
**Utility Items (Desktop Only)**

Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app.

Add Utility Item Utility Bar Alignment Default

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.



To enable the utility bar for this app, add a utility item.

## Utility items

**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**

**Selected Items**

<input checked="" type="checkbox"/> supplier
<input checked="" type="checkbox"/> rice details
<input checked="" type="checkbox"/> rice mills
<input checked="" type="checkbox"/> consumers

## Navigation items

**App Settings**

- App Details & Branding
- App Options
- Utility Items (Desktop Only)
- Navigation Items

**User Profiles**

**User Profiles**

Choose the user profiles that can access this app.

**Available Profiles**

**Selected Profiles**

System Administrator
employer
worker

## User Profiles

The screenshot shows the Salesforce Setup interface with the "App Manager" tab selected. The main title is "Lightning Experience App Manager". A search bar at the top right contains the text "Search Setup". Below the title, there are two buttons: "New Lightning App" and "New Connected App". The left sidebar has a "Quick Find" search bar and a navigation tree with sections like "Setup Home", "Service Setup Assistant", "Commerce Setup Assistant", "Multi-Factor Authentication Assistant", "Hyperforce Assistant", "Release Updates", "Lightning Experience Transition Assistant", "Salesforce Mobile App", "Lightning Usage Optimizer", "Sales Cloud Everywhere", "ADMINISTRATION", "Users", "Data", "Email", "PLATFORM TOOLS", "Subscription Management", "Apps", "App Manager" (which is selected), "AppExchange Marketplace", and "Connected Apps". The main content area displays a table titled "23 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type". The table columns are: App Name (sorted), Developer Name, Description, Last Modified Date, App Type, and Visibility. The data rows are as follows:

App Name	Developer Name	Description	Last Modified Date	Type	Visibility
Community	Community	Salesforce CRM Communities	09/05/2024, 3:33 am	Classic	✓
Content	Content	Salesforce CRM Content	09/05/2024, 3:33 am	Classic	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	09/05/2024, 3:33 am	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	09/05/2024, 3:33 am	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	09/05/2024, 3:33 am	Lightning	✓
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	09/05/2024, 3:33 am	Classic	✓
MY RICE	MY_RICE		26/06/2024, 9:49 pm	Lightning	✓
Platform	Platform	The fundamental Lightning Platform	09/05/2024, 3:33 am	Classic	✓
Queue Management	QueueManagement	Create and manage queues for your business.	09/05/2024, 3:33 am	Lightning	✓
Sales	Sales	The world's most popular sales force automation (SFA) solution	09/05/2024, 3:33 am	Classic	✓
Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	09/05/2024, 3:33 am	Lightning	✓
Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	09/05/2024, 3:33 am	Lightning	✓
Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	09/05/2024, 3:33 am	Classic	✓
Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	09/05/2024, 3:36 am	Lightning	✓
Service	Service	Manage customer service with accounts, contacts, cases, and more	09/05/2024, 3:33 am	Classic	✓
Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across c...	09/05/2024, 3:33 am	Lightning	✓
Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com applic...	09/05/2024, 3:33 am	Classic	✓
Subscription Management	RevenueCloudConsole	Get started automating your revenue processes	09/05/2024, 3:33 am	Lightning	✓

## My rice app manager

## Milestone 5 : Fields

The screenshot shows the Salesforce Setup interface for the 'rice details' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, etc. The main content area displays the 'Fields & Relationships' section with 7 items. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	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	Number(5, 0)		
supplier Name	supplier_c	Master-Detail(supplier)		✓

Rice details fields

The screenshot shows the Salesforce Setup interface for the 'consumer' object. The left sidebar lists various setup categories. The main content area displays the 'Fields & Relationships' section with 15 items. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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	CreatedBy	Lookup(User)		
email	email_c	Email		
First name	First_name_c	Text(18)		
Last Modified By	LastModifiedBy	Lookup(User)		
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)		✓

Consumer fields



Setup Home Object Manager

rice mill

Details	Fields & Relationships				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)		
Lightning Record Pages	Last Modified By	LastModifiedById	Lookup(User)		
Buttons, Links, and Actions	Owner	OwnerId	Lookup(User,Group)		✓
Compact Layouts	rice distributed to shops	rice_distributed_to_shops_c	Roll-Up Summary (SUM rice details)		
Field Sets	rice mill Name	Name	Auto Number		✓
Object Limits	rice price/kg	rice_price_kg_c	Number(5, 0)		
Record Types	rice taken	rice_taken_c	Roll-Up Summary (SUM consumer)		
Related Lookup Filters					
Search Layouts					
List View Button Layout					
Restriction Rules					
Scoping Rules					
Triggers					
Flow Triggers					
Validation Rules					

## Rice mill fields



Setup Home Object Manager

rice details

Details	Fields & Relationships				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)		
Lightning Record Pages	Last Modified By	LastModifiedById	Lookup(User)		
Buttons, Links, and Actions	rice details Name	Name	Auto Number		✓
Compact Layouts	rice distributed	rice_distributed_c	Number(5, 0)		
Field Sets	rice mill 1(one)	rice_mill_1_one_c	Master-Detail(rice mill)		✓
Object Limits	supplier name	supplier_name_c	Number(5, 0)		
Record Types	supplier Name	supplier_c	Master-Detail(supplier)		✓
Related Lookup Filters					
Restriction Rules					
Scoping Rules					
Triggers					
Flow Triggers					
Validation Rules					

## Rice details Fields

## Milestone 6 : Page layouts

The screenshot shows the Salesforce Setup interface for the 'consumer' object. The left sidebar contains navigation links for Details, Fields & Relationships, Page Layouts (which is selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main content area displays a table titled 'Page Layouts' with one item: 'consumer Layout' created by Sanskar Chhaparia on 26/06/2024, 7:24 pm, last modified by Sanskar Chhaparia on 26/06/2024, 11:11 pm. A 'Quick Find' search bar and 'New' and 'Page Layout Assignment' buttons are at the top right.

### Page layout

The screenshot shows the layout editor for the 'consumer' page layout. The left sidebar is identical to the previous screenshot. The main area features a 'Layout Properties' tab with tabs for Save, Quick Save, Preview As..., Cancel, Undo, and Redo. A 'Fields' section lists fields like consumer Name, Last Modified By, Record Type, and Rice type. Below this are sections for 'Receipt details', 'rice details', 'Personal details', and 'Mobile Cards (Salesforce mobile only)'. A note at the bottom says 'Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.' A 'Related Lists' section is at the very bottom.

### Consumer Page Layout

# Milestone 7 : Profiles

## Owner Profile

The screenshot shows the Salesforce Setup interface for managing profiles. The top navigation bar includes 'SETUP', 'Home', 'Object Manager', and a search bar. The left sidebar shows 'Users' and 'Profiles'. The main content area is titled 'Profiles' and displays the 'OWNER' profile. It shows the profile's name, license ('Salesforce'), and creation details ('Created By: Sanskar Chhacaria, 26/06/2024, 11:14 pm'). Below this is a section for 'Page Layouts' which lists various standard object layouts for different objects like Account, Opportunity, and Order.

The screenshot shows the Salesforce Setup interface for managing custom object permissions and password policies. The top navigation bar includes 'SETUP', 'Home', 'Object Manager', and a search bar. The left sidebar shows 'Users' and 'Profiles'. The main content area is titled 'Profiles' and displays 'Custom Object Permissions' for objects like 'Macros', 'consumers', 'rice details', 'rice mills', and 'supplier'. It also shows 'Session Settings' for session timeout and security level, and 'Password Policies' including password expiration, complexity requirements, and lockout periods.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The profile 'employer' is displayed. The 'Profile Detail' section shows the profile name is 'employer', user license is 'Salesforce Platform', and it was created by 'Sanskar Chhaora' on 26/06/2024, 11:23 pm. The 'Modified By' field shows 'Sanskar Chhaora' on 27/06/2024, 2:54 pm. The 'Custom Profile' checkbox is checked. The 'Page Layouts' section lists various standard object layouts and their corresponding global layouts, such as Global Layout for Account and Invoice Line Layout for Invoice Line.

## Employer profile

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The profile 'worker' is displayed. The 'Profile Detail' section shows the profile name is 'worker', user license is 'Salesforce Platform', and it was created by 'Sanskar Chhaora' on 26/06/2024, 11:27 pm. The 'Modified By' field shows 'Sanskar Chhaora' on 27/06/2024, 2:54 pm. The 'Custom Profile' checkbox is checked. The 'Page Layouts' section lists various standard object layouts and their corresponding global layouts, such as Global Layout for Account and Invoice Line Layout for Invoice Line.

## Worker profile

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

- Header:** Search bar with "Search Setup" and various navigation icons.
- Left Sidebar:** "Setup" icon, "Home" link, "Object Manager" dropdown, and a search bar with "profiles". Below it, under "Users", is a link to "Profiles". A note says "Didn't find what you're looking for? Try using Global Search."
- Main Content:**
  - Profiles:** A grid of checkboxes for various object permissions. Columns include Business Brands, Communication Subscriptions, Communication Subscription Channel Types, Communication Subscription Consents, Communication Subscription Timings, Contacts, Contact Point Addresses, Contact Point Consents, Contact Point Emails, Ideas, Individuals, Labels, Locations, Party Consents, Push Topics, Sellers, Streaming Channels, and User External Credentials.
  - Custom Object Permissions:** Two tables for "consumers" and "rice details".

	Basic Access	Read	Create	Edit	Delete	Data Administration	View All	Modify All
consumers		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
rice details		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

	Basic Access	Read	Create	Edit	Delete	Data Administration	View All	Modify All
rice mills		<input checked="" type="checkbox"/>	<input type="checkbox"/>					
supplier		<input checked="" type="checkbox"/>	<input type="checkbox"/>					
  - Session Settings:** Session Times Out After (2 hours of inactivity), Session Security Level Required at Login (None).
  - Password Policies:** User passwords expire in 90 days, Enforce password history 3 passwords remembered, Minimum password length 8, Password complexity requirement Must include alpha and numeric characters.

## Milestone 8 : Role & Role Hierarchy

The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. The left sidebar includes links for Setup Home, Service Setup Assistant, Commerce Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, Administration (Users, Roles), and User Management Settings. The main content area displays the 'Creating the Role Hierarchy' page. It features a search bar at the top right and a tree view of roles under 'Your Organization's Role Hierarchy'. The hierarchy includes the following roles:

- Galileos College Of Engineering And Technology
  - CEO
  - CFO
  - COO
  - owner
  - employer
    - worker
  - SVP\_Customer\_Service & Support
  - Customer\_Support\_International
  - Customer\_Support\_North\_America
  - Installation & Repair Services
  - SVP\_Human\_Resources
  - SVP\_Sales & Marketing
  - VP\_International\_Sales

Each role entry has 'Edit | Del | Assign' options and an 'Add Role' link.

## Roles

## Milestone 9 : Users

User Detail

Name	vicky y	Role	owner
Alias	vy	User License	Salesforce
Email	sanskard030chhaparia@gmail.com [Verify]	Profile	owner
Username	sanskard030chhaparia12@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	vicky	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	Gola Bazar Dachidi, Ward No.18, Khalilabad,Sant Kabir Nagar Khalilabad 272175 UTTAR PRADESH India	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	<input type="checkbox"/> View
Delegated Approver		Data.com User Type	<input type="checkbox"/> <a href="#">View</a>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">View</a>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> <a href="#">View</a>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> <a href="#">View</a>
App Registration: One-Time Password Authenticator	<a href="#">View</a>	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> <a href="#">View</a>
App Registration: Salesforce Authenticator	<a href="#">View</a>	Salesforce CRM Content User	<input checked="" type="checkbox"/>
Security Key (U2F or WebAuthn)	<a href="#">View</a>	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Lightning Login	<a href="#">View</a>	Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>

## First user

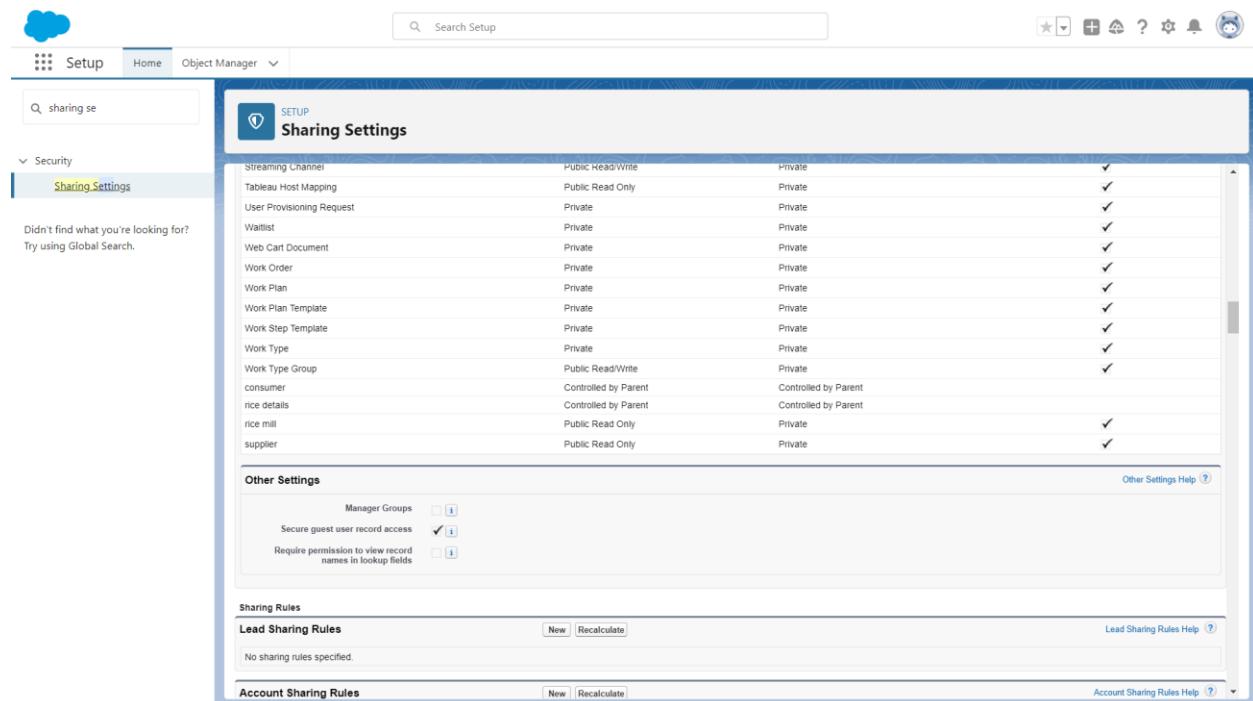
User Detail

Name	ram ram	Role	employer
Alias	vy	User License	Salesforce Platform
Email	sanskard030chhaparia@gmail.com [Verify]	Profile	Standard Platform User
Username	sanskard030chhaparia123@gmail.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	<input type="checkbox"/> View
Delegated Approver		Data.com User Type	<input type="checkbox"/> <a href="#">View</a>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">View</a>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> <a href="#">View</a>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> <a href="#">View</a>
App Registration: One-Time Password Authenticator	<a href="#">View</a>	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> <a href="#">View</a>
App Registration: Salesforce Authenticator	<a href="#">View</a>	Salesforce CRM Content User	<input checked="" type="checkbox"/>
Security Key (U2F or WebAuthn)	<a href="#">View</a>	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Lightning Login	<a href="#">View</a>	Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>

## Second user

## Milestone 10 : Permission sets

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



The screenshot shows the Salesforce Sharing Settings page. At the top, there's a search bar labeled "Search Setup". Below it, a navigation bar includes "Setup", "Home", and "Object Manager". On the left, a sidebar under "Sharing Settings" lists objects: "Sharing se", "Security", and "Sharing Settings". A message says "Didn't find what you're looking for? Try using Global Search." The main content area is titled "Sharing Settings" and contains a table of sharing rules:

Object	Sharing Rule	Access Level	Controlled By
Streaming Channel	Public Read/Write	Private	✓
Tableau Host Mapping	Public Read Only	Private	✓
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	✓

Below the table, there are sections for "Other Settings" (Manager Groups, Secure guest user record access, Require permission to view record names in lookup fields), "Sharing Rules" (Lead Sharing Rules, Account Sharing Rules), and "Lead Sharing Rules Help" and "Account Sharing Rules Help".

## Sharing Permission Settings

## Milestone 11 : 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.

## Below are all screenshots for report for My rice mill CRM Application

The screenshot shows the 'Reports' section of the 'MY RICE' application. On the left, there's a sidebar with categories like 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'Folders', 'All Folders', 'Created by Me', 'Shared with Me', and 'Favorites'. The main area displays a table with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. Two reports are listed: 'Copy of range of amount per day' and 'range of amount per day'. Both reports were created by Sanskar Chhaparia on different dates.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
<b>Recent</b>	Copy of range of amount per day		estimated rice per day	Sanskar Chhaparia	1/7/2024, 8:42 pm	<input checked="" type="checkbox"/>
	range of amount per day		estimated rice per day	Sanskar Chhaparia	27/6/2024, 3:13 pm	<input checked="" type="checkbox"/>

This screenshot shows a detailed view of the 'Copy of range of amount per day' report. At the top, it displays summary statistics: Total Records (10), Total rice price/kg (292), and Total Amount Paid (9,494.00). Below this is a table with columns: Rice taken by shops, Consumer Name, Rice type, rice price/kg, Mode of payment, and Amount Paid. The table lists individual transactions and their subtotals, ending with a grand total of 3,900.00.

Total Records	Total rice price/kg	Total Amount Paid			
10	292	9,494.00			
<input type="checkbox"/> Rice taken by shops <input type="button" value="▼"/>					
<input type="checkbox"/> 10 (1) Consumer 1 1.basmati 20 Cash 200.00					
<b>Subtotal</b> 20 200.00					
<input type="checkbox"/> 12 (1) consumer 10 1.basmati 26 Cash 312.00					
<b>Subtotal</b> 26 312.00					
<input type="checkbox"/> 14 (1) consumer 9 1.basmati 12 Cash 168.00					
<b>Subtotal</b> 12 168.00					
<input type="checkbox"/> 20 (1) consumer 2 2.normal rice 15 Cash 300.00					
<b>Subtotal</b> 15 300.00					
<input type="checkbox"/> 28 (1) consumer 6 1.basmati 18 Cash 504.00					
<b>Subtotal</b> 18 504.00					
<input type="checkbox"/> 30 (1) consumer 3 1.basmati 10 Cash 300.00					
<b>Subtotal</b> 10 300.00					
<input type="checkbox"/> 35 (1) consumer 7 1.basmati 16 Cash 560.00					
<b>Subtotal</b> 16 560.00					
<input type="checkbox"/> 39 (1) consumer 8 1.basmati 100 Cash 3,900.00					
<b>Subtotal</b> 100 3,900.00					
<input type="checkbox"/> 40 (1) consumer 4 1.basmati 50 Cash 2,000.00					
<b>Subtotal</b> 50 2,000.00					
<input type="checkbox"/> <input type="checkbox"/> Row Counts <input checked="" type="checkbox"/> Detail Rows <input checked="" type="checkbox"/> Subtotals <input checked="" type="checkbox"/> Grand Total					

MY RICE supplier rice details rice mills consumers Dashboards estimated data Report Builder

REPORT Copy of range of amount per day rice mills with consumers

Rice taken by shops Consumer Name Rice type rice price/kg Mode of payment Amount Paid

Rice taken by shops	Consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
10 (1)	Consumer 1	1.basmati	20	Cash	200.00
<b>Subtotal</b>			20		200.00
12 (1)	consumer 10	1.basmati	26	Cash	312.00
<b>Subtotal</b>			26		312.00
14 (1)	consumer 9	1.basmati	12	Cash	168.00
<b>Subtotal</b>			12		168.00
20 (1)	consumer 2	2.normal rice	15	Cash	300.00
<b>Subtotal</b>			15		300.00
28 (1)	consumer 6	1.basmati	18	Cash	504.00
<b>Subtotal</b>			18		504.00
30 (1)	consumer 3	1.basmati	10	Cash	300.00
<b>Subtotal</b>			10		300.00
35 (1)	consumer 7	1.basmati	16	Cash	560.00
<b>Subtotal</b>			16		560.00
39 (1)	consumer 8	1.basmati	100	Cash	3,900.00
<b>Subtotal</b>			100		3,900.00
40 (1)	consumer 4	1.basmati	50	Cash	2,000.00
<b>Subtotal</b>			50		2,000.00
50 (1)	consumer 5	2.normal rice	25	Cash	1,250.00
<b>Subtotal</b>			25		1,250.00
					...
Row Counts	Detail Rows	Subtotals	Grand Total		

Update Preview Automatically

Report: rice mills with consumers  
Copy of range of amount per day

Total Records: 10 Total rice price/kg: 292 Total Amount Paid: 9,494.00

Rice taken by shops Consumer Name Rice type rice price/kg Mode of payment Amount Paid

Rice taken by shops	Consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
10 (1)	Consumer 1	1.basmati	20	Cash	200.00
<b>Subtotal</b>			20		200.00
12 (1)	consumer 10	1.basmati	26	Cash	312.00
<b>Subtotal</b>			26		312.00
14 (1)	consumer 9	1.basmati	12	Cash	168.00
<b>Subtotal</b>			12		168.00
20 (1)	consumer 2	2.normal rice	15	Cash	300.00
<b>Subtotal</b>			15		300.00
28 (1)	consumer 6	1.basmati	18	Cash	504.00
<b>Subtotal</b>			18		504.00
30 (1)	consumer 3	1.basmati	10	Cash	300.00
<b>Subtotal</b>			10		300.00
35 (1)	consumer 7	1.basmati	16	Cash	560.00
<b>Subtotal</b>			16		560.00
39 (1)	consumer 8	1.basmati	100	Cash	3,900.00
<b>Subtotal</b>			100		3,900.00
40 (1)	consumer 4	1.basmati	50	Cash	2,000.00
<b>Subtotal</b>			50		2,000.00
50 (1)	consumer 5	2.normal rice	25	Cash	1,250.00
<b>Subtotal</b>			25		1,250.00
					...
Row Counts	Detail Rows	Subtotals	Grand Total		

Edit Subscription

Settings

Frequency: Daily

When: Relative Week First Day Monday

Time: 8:00 pm

Attachment: Attach File

Recipients: Send email to Me Edit Recipients

Run Report As: Me Another Person

Conditions: In addition to subscribing, you can set up conditions on this report. You will be notified when conditions are met. This is optional.

Unsubscribe Cancel Save

MY RICE

supplier rice details rice mills consumers Dashboards estimated data \* Copy of range of amount p... X

Reports All Folders 8 items

	Name	Created By	Created On	Last Modified By	Last Modified Date
REPORTS	Einstein Bot Reports	Automated Process	9/5/2024, 3:33 am	Automated Process	9/5/2024, 3:33 am
Recent	Einstein Bot Reports Spring '23	Automated Process	9/5/2024, 3:33 am	Automated Process	9/5/2024, 3:33 am
Created by Me	Einstein Bot Reports Summer '23	Automated Process	9/5/2024, 3:33 am	Automated Process	9/5/2024, 3:33 am
Private Reports	Einstein Bot Reports Summer '22	Automated Process	9/5/2024, 3:33 am	Automated Process	9/5/2024, 3:33 am
Public Reports	Einstein Bot Reports Winter '23	Automated Process	9/5/2024, 3:33 am	Automated Process	9/5/2024, 3:33 am
All Reports	Enablement Dashboard Reports Spring '24	Automated Process	9/5/2024, 3:33 am	Automated Process	9/5/2024, 3:33 am
FOLDERS	Enablement Dashboard Reports Summer '24	Automated Process	16/6/2024, 8:05 am	Automated Process	16/6/2024, 8:05 am
All Folders	estimated rice per day	Sanskari Chhaparia	27/6/2024, 12:00 am	Sanskari Chhaparia	27/6/2024, 12:00 am

Created by Me Shared with Me

FAVORITES All Favorites

MY RICE supplier rice details rice mills consumers Dashboards estimated data \* range of amount per day X

Report: rice mills with consumers range of amount per day

You started a report subscription. X

Total Records Total rice price/kg Total Amount Paid  
10 292 9,494.00

<input type="checkbox"/> Rice taken by shops	Consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
<input type="checkbox"/> 10 (1)	Consumer 1	1.basmati	20	Cash	200.00
<b>Subtotal</b>			20		200.00
<input type="checkbox"/> 12 (1)	consumer 10	1.basmati	26	Cash	312.00
<b>Subtotal</b>			26		312.00
<input type="checkbox"/> 14 (1)	consumer 9	1.basmati	12	Cash	168.00
<b>Subtotal</b>			12		168.00
<input type="checkbox"/> 20 (1)	consumer 2	2.normal rice	15	Cash	300.00
<b>Subtotal</b>			15		300.00
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<b>Subtotal</b>			18		504.00
<input type="checkbox"/> 30 (1)	consumer 3	1.basmati	10	Cash	300.00
<b>Subtotal</b>			10		300.00
<input type="checkbox"/> 35 (1)	consumer 7	1.basmati	16	Cash	560.00
<b>Subtotal</b>			16		560.00
<input type="checkbox"/> 39 (1)	consumer 8	1.basmati	100	Cash	3,900.00
<b>Subtotal</b>			100		3,900.00
<input type="checkbox"/> 40 (1)	consumer 4	1.basmati	50	Cash	2,000.00
<b>Subtotal</b>			50		2,000.00
<input type="checkbox"/> 40 (1)	consumer 5	1.basmati	50	Cash	2,000.00
<b>Subtotal</b>			50		2,000.00
<input checked="" type="checkbox"/> Row Counts	<input checked="" type="checkbox"/> Detail Rows	<input checked="" type="checkbox"/> Subtotals	<input checked="" type="checkbox"/> Grand Total		

## **Milestone 12 : 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.

Below are dashboard details with estimated data graph:

MY RICE

supplier rice details rice mills consumers Dashboards estimated data \* range of amount per day X

Search...

Dashboards Recent 1 item

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
<b>Recent</b>	estimated data	total amount of data in dashboards	amount data dashboard	Sanskars Chhaparia	27/6/2024, 12:04 am	<input type="checkbox"/>

Created by Me  
Private Dashboards  
All Dashboards

FOLDERS  
All Folders  
Created by Me  
Shared with Me

FAVORITES  
All Favorites

MY RICE supplier rice details rice mills consumers Dashboards estimated data \* range of amount per day X

Dashboard **estimated data**  
total amount of data in dashboards  
⚠ Last refreshed 14 days ago. Refresh this dashboard to see the latest data.  
As of 27-Jun-2024, 3:23 pm Viewing as Sanskar Chhaparia

range of amount per day

View Report (range of amount per day)

range of amount per day

Rice taken by shops

Sum of rice price/kg

View Report (range of amount per day)