

A CRM APPLICATION FOR WHOLESALE RICE MILL

Project Overview:

This project aims to build a comprehensive CRM application tailored for a wholesale rice mill using Salesforce. The application includes functionalities to manage rice distribution, track consumer interactions, and analyze sales data. The key components of the project are:

1. Custom Objects and Fields:

- Creation of custom objects like Consumers, Rice Details, Rice Mill, and Suppliers.
- Adding custom fields to capture relevant data such as rice type, amount distributed, and payment mode.

2. Roles and Profiles:

- Defining roles like Owner, Employer, and Worker with appropriate access permissions.
- Creating profiles and assigning them to users to control their access levels.

3. Page Layouts:

- Designing page layouts for different objects to ensure that users have an intuitive and organized interface.

4. Reports and Dashboards:

- Generating reports to analyze daily rice distribution and consumer interactions.
- Creating dashboards to provide a visual summary of key metrics and performance indicators.

5. Automation and Notifications:

- Setting up email notifications to keep the Owner informed about daily reports.
- Automating data entry and updates through workflows and validation rules.

6. Data Organization:

- Organizing reports and dashboards into folders for easy access and management.
- Ensuring that the application is user-friendly and meets the specific needs of the rice mill business.

Pre-requisites

Salesforce Developer account

Knowledge of the salesforce admin concepts.

Installed with 2 web browsers in the Machine

Good internet connectivity.

Milestone 1-Salesforce:

Introduction:

What Is Salesforce?

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

Salesforce has everything that need to run the business from anywhere. Using standard products and features, manage relationships with prospects and customers, collaborate and engage with employees and partners, and store data securely in the cloud.

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 details.

→ developer.salesforce.com/signup

Build enterprise-quality apps fast to bring your ideas to life

- 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

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name* Likhitha Last Name* Batta

Email* likhithab2612@gmail.com

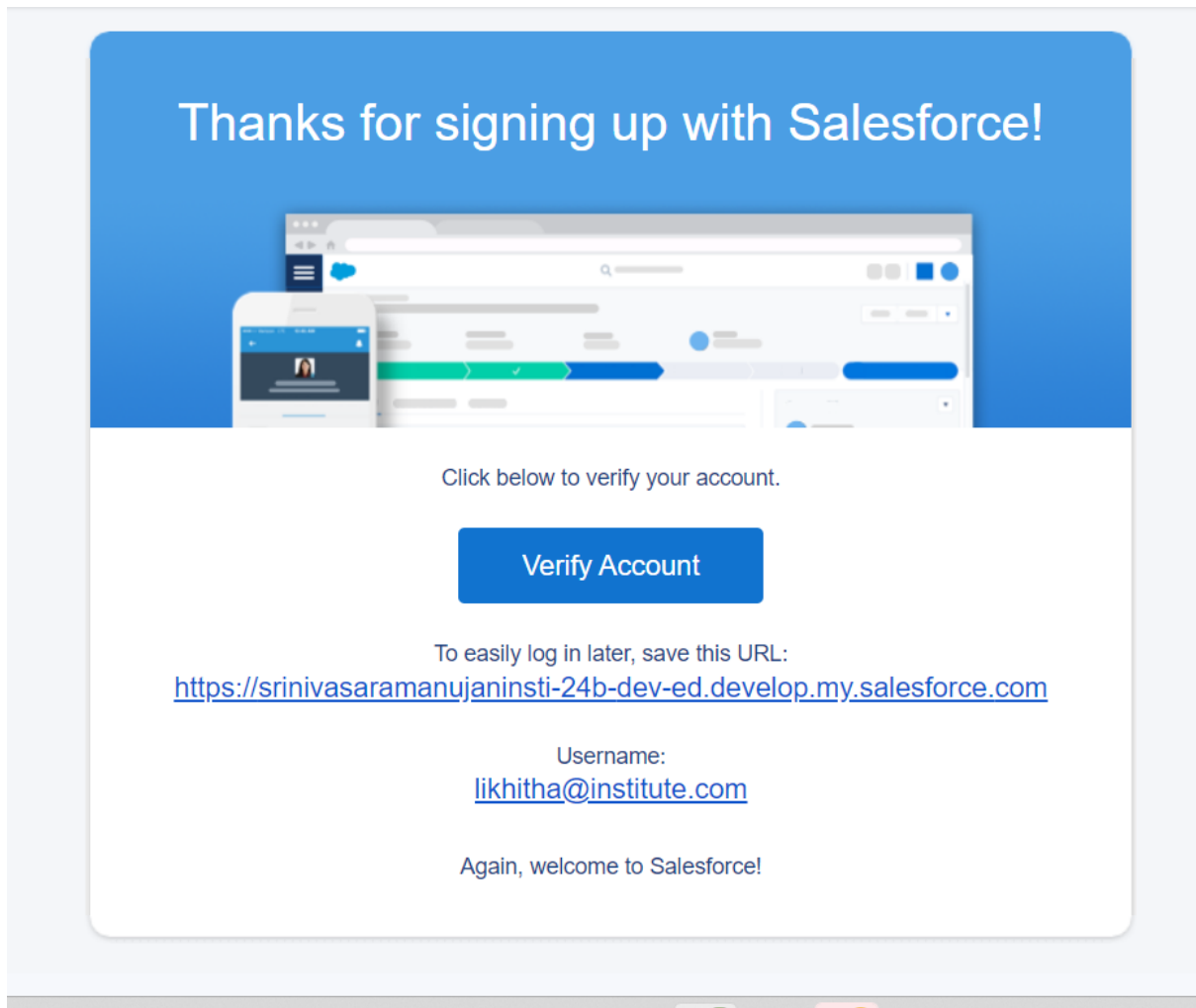
Role* Developer

Company* Srinivasa Ramanujan Institute of Technology

Country/Region*

Activity 2: Account Activation:

1. Click on Verify Account.



Milestone 2- Object

What Is an Object?

Salesforce objects are database tables that permit to store data that is specific to an organization.

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.

Activity 1: Create Supplier Object:

To create an object:

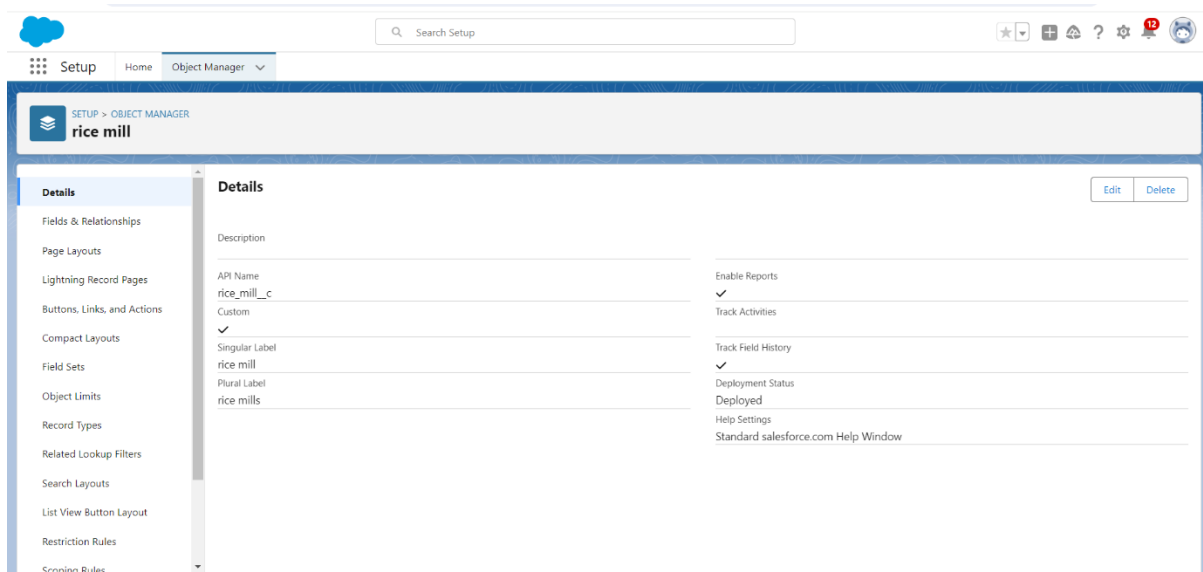
1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
2. Enter the label name → **supplier**

3. Plural label name → supplier
4. Enter Record Name Label and Format
5. Record Name → supplier Name
6. Data Type → Text
7. Click on Allow reports and Track Field History and allow search
8. Allow search → **Save.**

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar labeled 'Search Setup'. Below it, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'supplier' and shows the 'Details' tab selected in the left sidebar. The 'Details' section includes fields for 'Description', 'API Name' (supplier__c), 'Custom' (checked), 'Singular Label' (supplier), and 'Plural Label' (supplier). On the right, there are checkboxes for 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), and 'Deployment Status' (Deployed). At the bottom right, there are 'Edit' and 'Delete' buttons.

Activity 2: Create Rice mill Object:

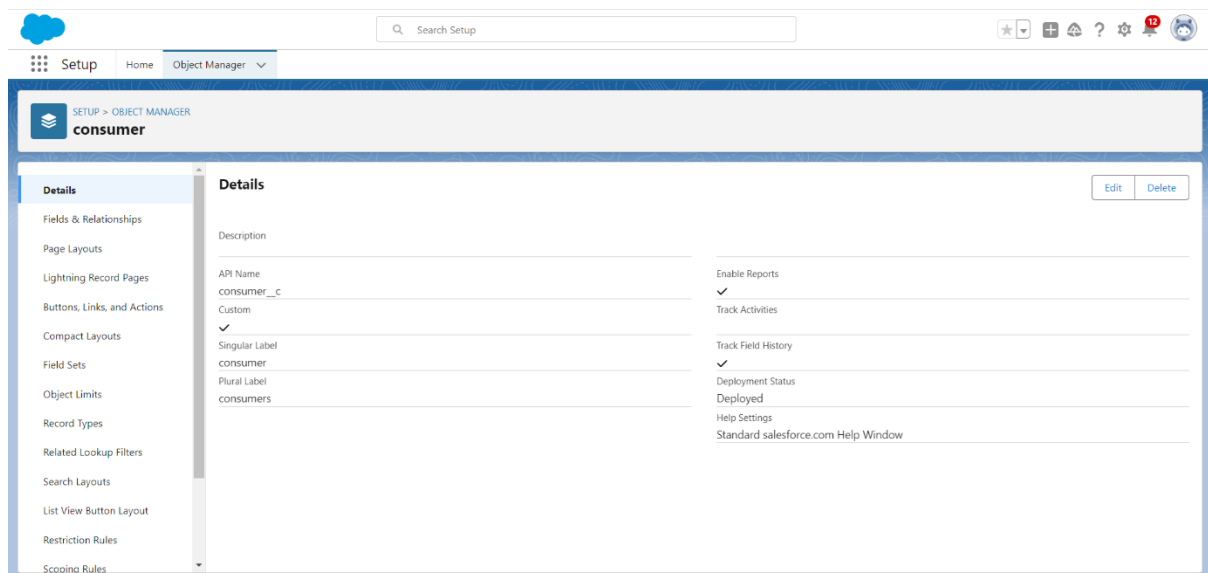
1. Enter the label name → rice mill
2. Plural label name → rice mills
3. Enter Record Name Label and Format
4. Record Name →
5. Data Type → Auto Number
6. Display Format → rice-{000}
7. Starting number → 1
8. Click on Allow reports and Track Field History, Allow Search.
9. Allow search → **Save.**



Activity 3: Create consumer Objects:

Note: Follow the same steps as mentioned in Activity 2 for the and Receipt objects.

1. Use these display format for the **consumer**
2. label name → **consumer**
3. Plural label name → **consumers**
4. Display Format → **consumers-{000}**
5. Starting number → 1



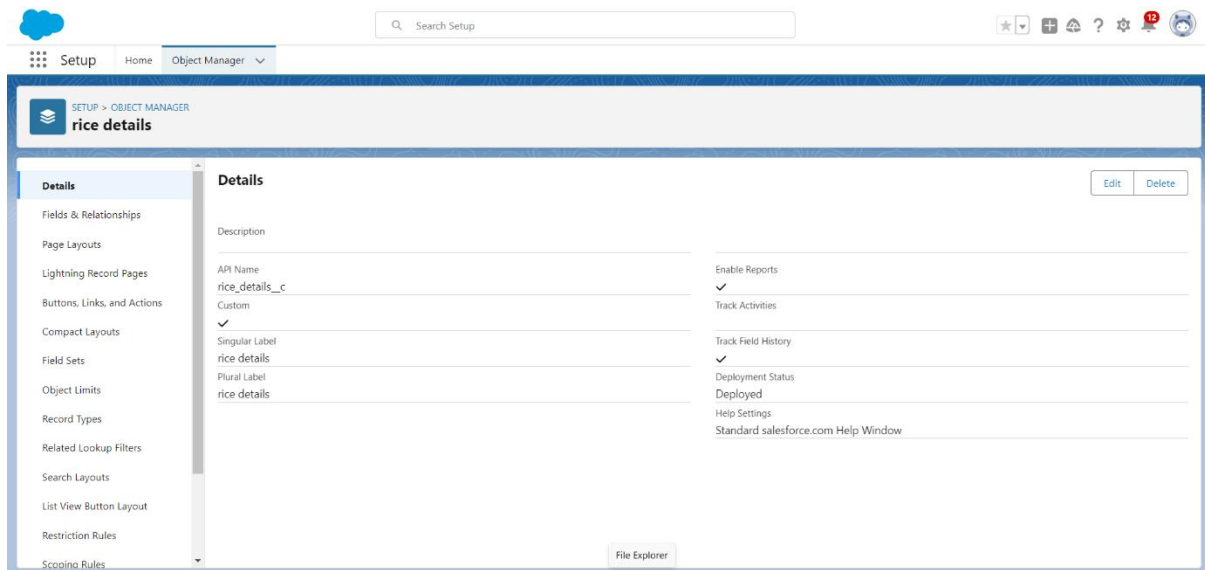
6.

Activity 4: Create rice details Objects:

1. Use these display format for the rice details
2. label name → rice details
3. Plural label name → rice details

4. Display Format → rice-{000}

5. Starting number → 1



Milestone 3- Tabs

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

Types of Tabs:

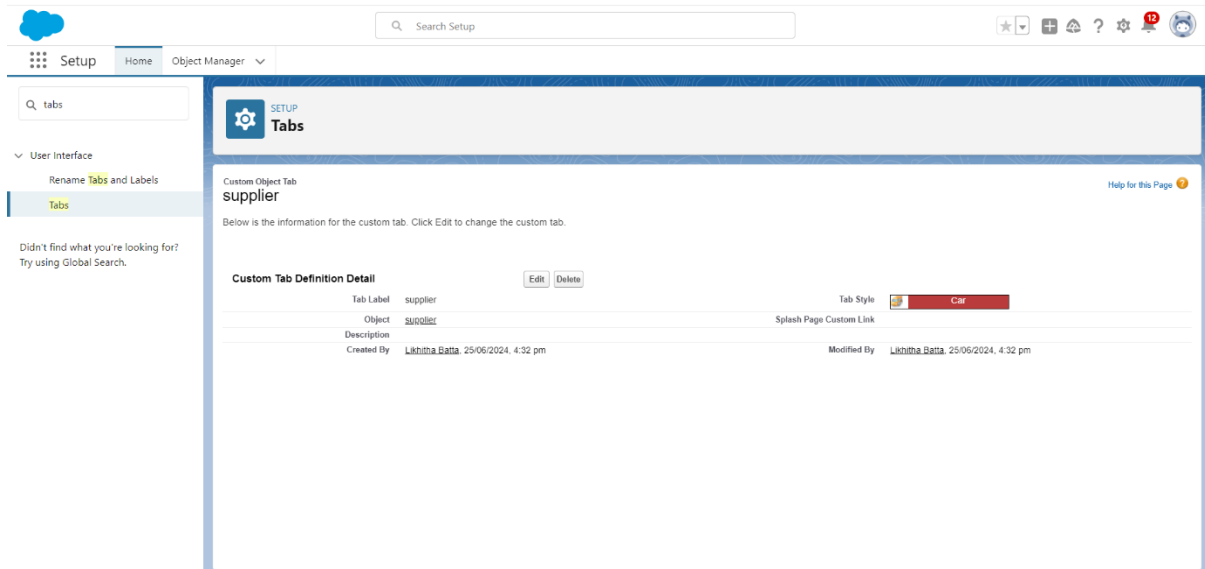
1. **Custom Tabs:** Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.
2. **Web Tabs:** Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window.
3. **Visualforce Tabs:** Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.
4. **Lightning Component Tabs:** Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.
5. **Lightning Page Tabs:** Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu. Lightning Page tabs don't work like other custom tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

Activity 1: Creating a Custom Tab

To create a Tab:

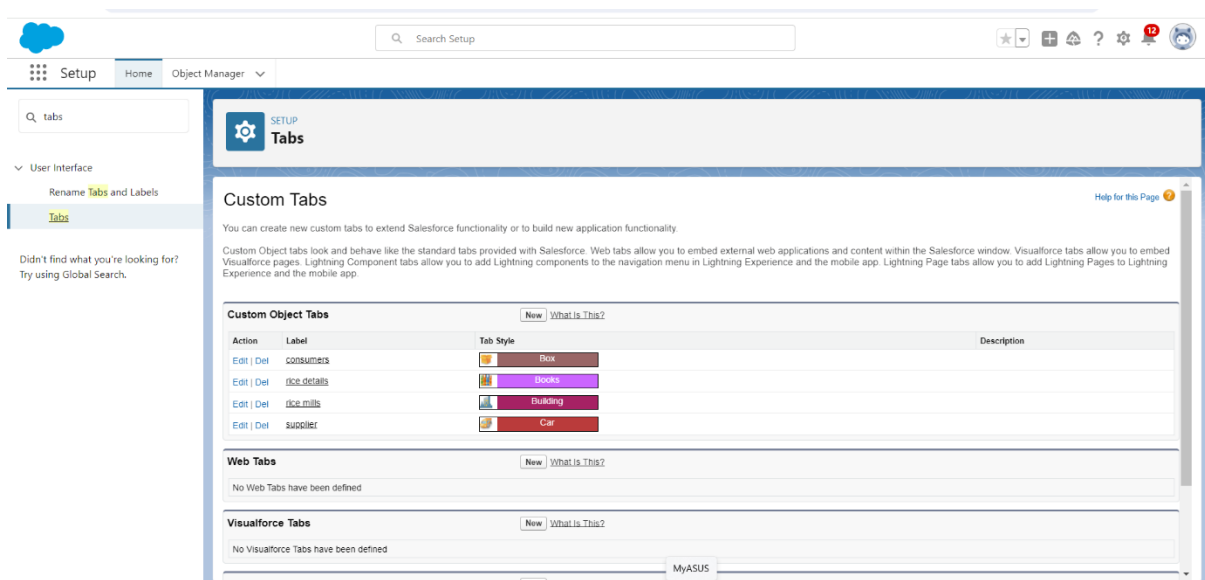
1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)

2. Select Object(supplier) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) uncheck the include tab.
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.



Activity 2: Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “rice mill, **consumer**, rice details”.
2. Follow the same steps as mentioned in Activity -1.



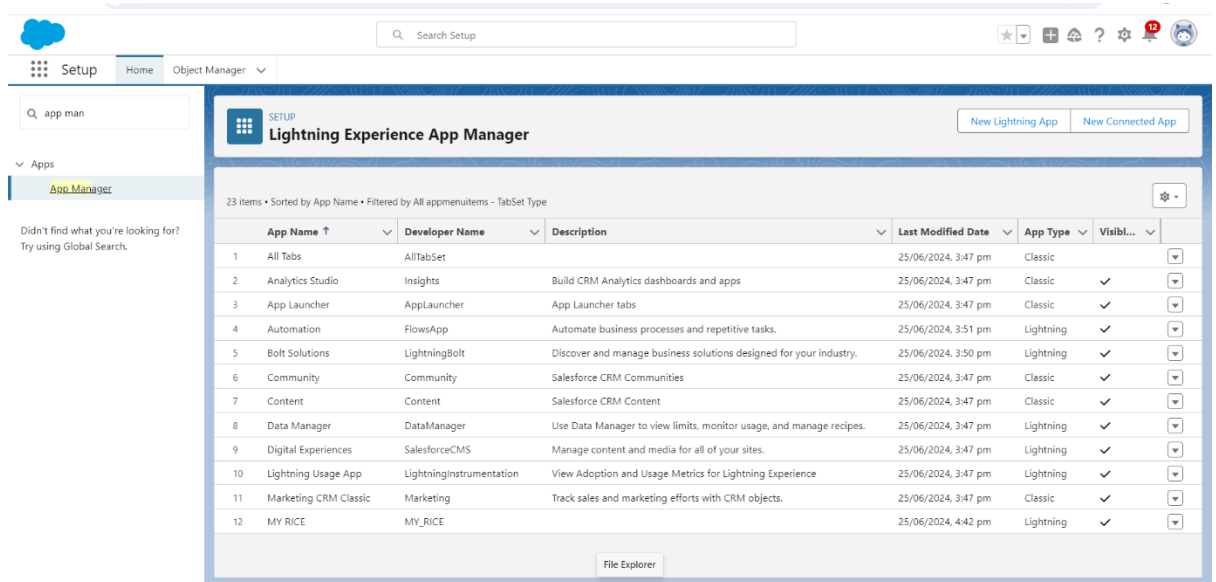
Milestone 4- The Lightning App:

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.

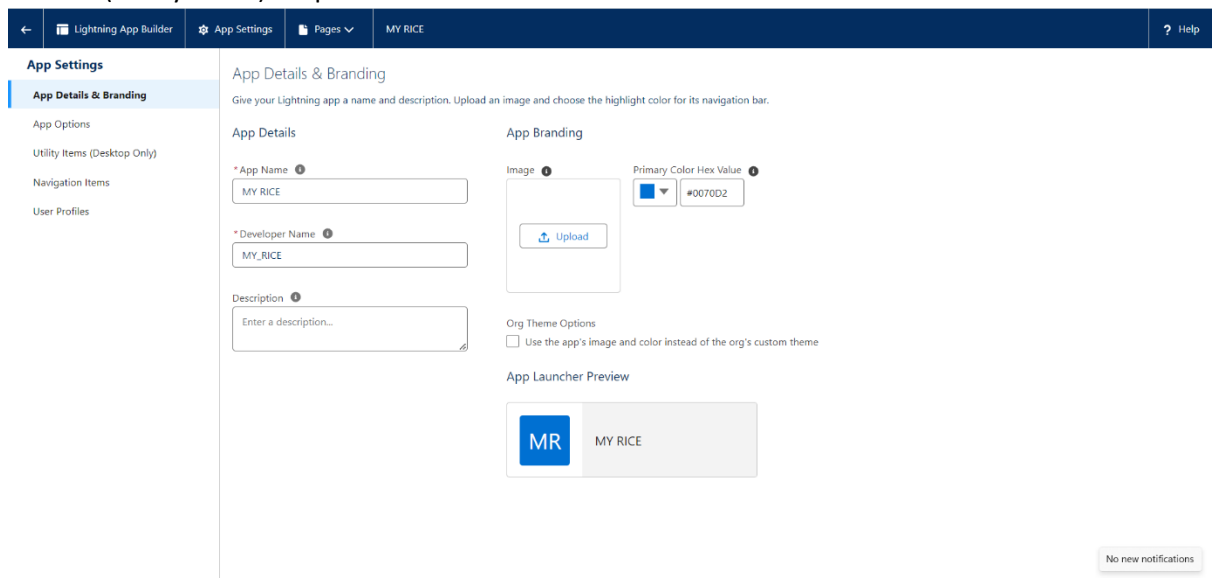
Lightning apps let you brand your apps with a custom color and logo. Also include a utility bar and Lightning page tabs in your Lightning app. Members of the org can work more efficiently by easily switching between apps.

Activity 1: Create a Lightning App

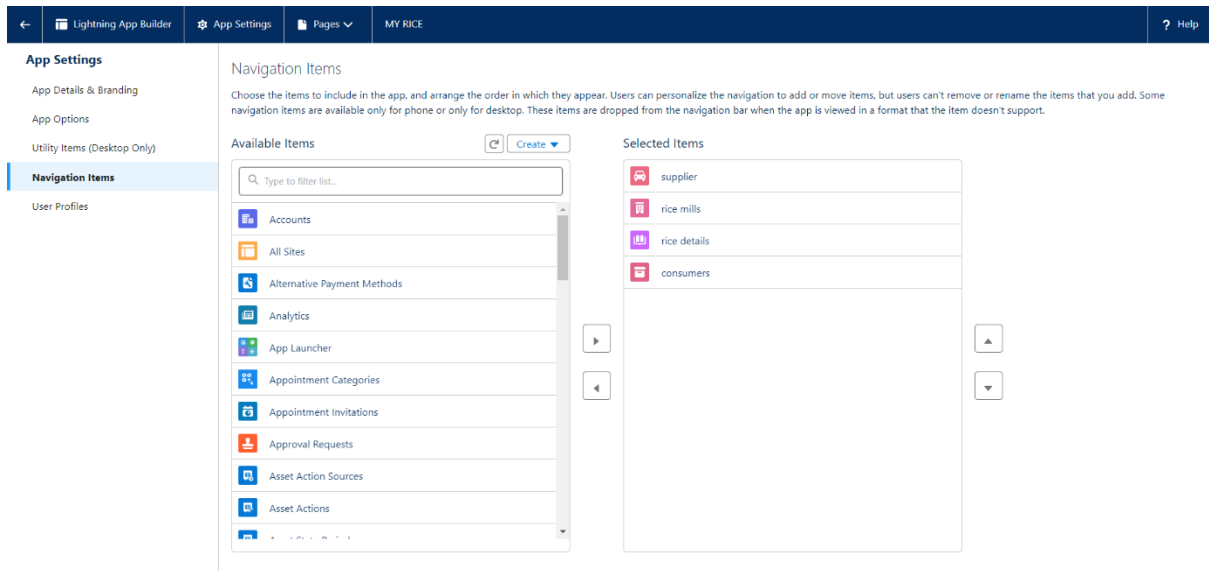
1. Go to setup page → search “app manager” in quick find → select “app manager” → click on New lightning App.



2. Fill the app name in app details as MY RICE → Next → (App option page) keep it as default → Next → (Utility Items) keep it as default → Next.

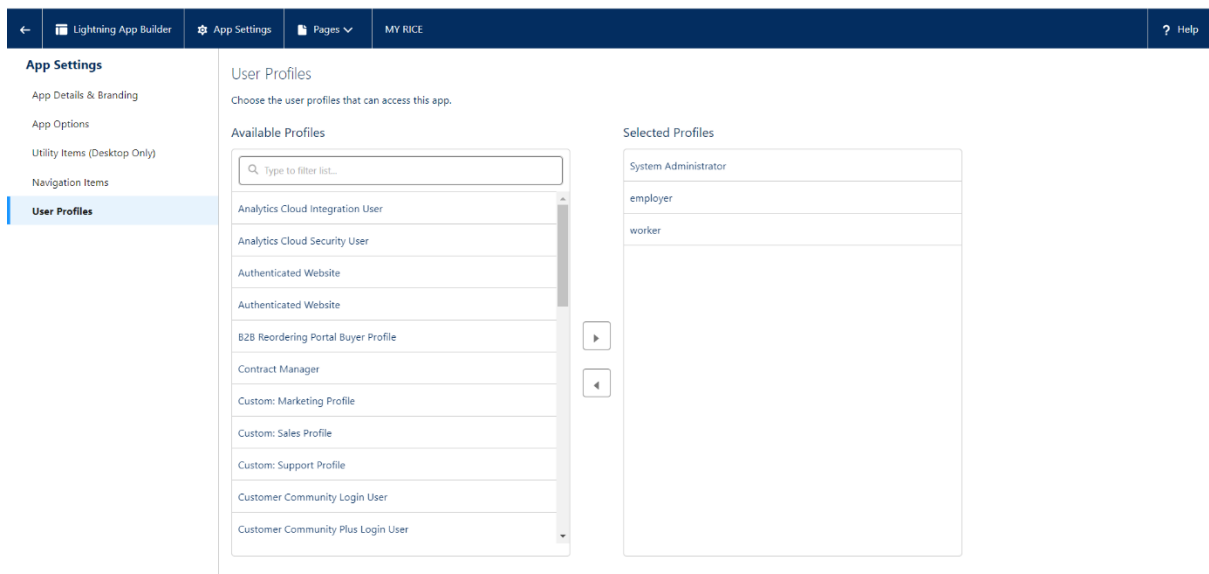


3. Upload a photo that is related to your app.
4. To Add Navigation Items:
Select the items (supplier, rice mill, consumer, Rice details) from the search bar and move it using the arrow button → Next.



5. To Add User Profiles:

Search profiles (System administrator) in the search bar → click on the arrow button → save & finish.



Milestone 5: 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 require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

- Created By
- Owner
- Last Modified
- Field Made During Object Creation

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

Activity 1: Creating the number field in rice details object

1. Go to the setup page → click on object manager → From drop down click edit for rice details object.
2. Click on fields & relationship → click on New.
3. Select Data type as “Number” and click Next.
4. Given the Field Label as “rice distributed” and length as “ 5 ”.
5. Field Name will be auto populated, and click on Next → Next → Save.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and a search bar. The main content area is titled 'rice details' and shows the 'Custom Field Definition Detail' for a field named 'rice distributed'. The field is of type 'Number' and has a length of 5. The field information section shows the field label, name, API name, and other details. The general options section includes checkboxes for Required, Unique, External ID, and AI Prediction. The field was created by 'Lakshya Ratta' on 25/06/2024 at 4:45 pm.

Field Information		Object Name
Field Label	rice distributed	rice details
Field Name	rice_distributed	Data Type
API Name	rice_distributed__c	Number
Description		
Help Text		
Data Owner		
Field Usage		
Data Sensitivity Level		
Compliance Categorization		
Created By	Lakshya Ratta	Modified By
	25/06/2024, 4:45 pm	Lakshya Ratta
		25/06/2024, 4:45 pm

Activity 2: Creating Junction Object:

A Junction object is a custom object that serves as a bridge between two related objects in a many-to-many relationship.

Creating junction object as rice details with supplier & rice mill

To create junction object

1. Go to the setup page → click on object manager → From drop down click edit for rice rice details object.
2. Click on fields & relationship → click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. Select the related object “supplier” and click next.
5. Give Field Label as “supplier Name” and click Next.
6. Next → Next → Save & New.
7. Follow the same steps from 1 to 3.
8. Select the related object “rice mill” and click Next.
9. Give Field Label as “rice mill 1(one)” and click Next.
10. Next → Next → Save.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' dropdown is open, showing 'rice details'. The main content area is titled 'FIELDS & RELATIONSHIPS' for the 'rice details' object. It displays a table with 7 items, sorted by Field Label. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The items listed are: Created By, Last Modified By, rice details Name, rice distributed, rice mill1(one), supplier Name, and supplier name.

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 mill1(one)	rice_mill1_one__c	Master-Detail(rice mill)		✓
supplier Name	supplier_Name__c	Master-Detail(supplier)		✓
supplier name	suppliern_ame__c	Number(5, 0)		

Activity 3: Creating a Master-Detail Relationship

master-detail relationship is a type of relationship between two objects where the master object controls certain behaviors and settings of the detail object.

Creating Master-Detail Relationship between consumer & rice mill Object

1. Go to the setup page → click on object manager → From drop down click edit for consumer object.
2. Click on fields & relationship → click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. Select the related object “rice mill”.
5. Give Field Label as “rice mill name” and click Next.
6. Next → Next → Save.

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Details, Fields & Relationships (selected), 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, and Scrolling Rules. The main content area is titled 'consumer Custom Field' and 'rice mill name'. It includes a 'Back to consumer' link and a 'Validation Rules' link. The 'Custom Field Definition Detail' section has tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table lists: Field Label (rice mill name), Field Name (rice_mill_name), API Name (rice_mill_name__c), Object Name (consumer), Data Type (Master-Detail), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By (Likhitha Batta, 25/06/2024, 4:52 pm), and Modified By (Likhitha Batta, 25/06/2024, 4:52 pm). The 'Master-Detail Options' section shows: Related To (rice_mill), Related List Label (consumers), Child Relationship Name (consumers), Sharing Setting (Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.), Reparentable Master Detail (checkbox), and a 'Lookup Filter' section.

Activity 4: Creating the Roll-up Summary

A rollup summary field is a field that summarizes data from a child object to a parent object that shares a master-detail relationship. Rollup summary fields can use the COUNT, SUM, MIN, and MAX functions.

Creating the Roll-up summary field on supplier & rice mill Objects.

1. Go to setup → click on Object Manager → type object name(supplier) in search bar → click on the object.
2. Now click on “Fields & Relationships” → New
1. Select the data type as “Rollup summary” and click Next.
4. Give the Field label as “sum of rice distributed”, Field Name will be Auto generated, and click Next.
5. Select the summarized object as “rice details”.
6. Select the Rollup type as “sum”.
7. Select the field to aggregate as “rice distributed”, and click Next → Next → Save.

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Details, Fields & Relationships (selected), 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, and Restriction Rules. The main content area is titled 'supplier Custom Field' and 'sum of rice distributed'. It includes a 'Back to supplier' link and a 'Help for this Page' icon. The 'Custom Field Definition Detail' section has tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays the following details:

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	Lakshmi Batta	Modified By	Lakshmi Batta
	25/06/2024, 6:49 pm		25/06/2024, 6:49 pm

The 'Roll-Up Summary Options' section displays the following details:

Data Type	Roll-Up Summary	Summary Type	SUM
Summarized Object	rice details		
Field to Aggregate	rice details: rice distributed		
Filter Criteria			

1. Follow the same steps for the rice mill Object from 1 to 3
2. Give the Field label as “rice distributed to shops”, Field Name will be Auto generated, and click Next.
3. Select the summarized object as “rice details”.
4. Select the Rollup type as “sum”.
5. Select the field to aggregate as “rice distributed”, and click Next → Next → Save.
6. **Note** : create the field as “rice taken by shops in kgs” using number datatype in consumer object
7. Follow the same steps for the rice mill Object from 1 to 3
8. Give the Field label as “rice taken”, Field Name will be Auto generated, and click Next.
9. Select the summarized object as “consumer”.
10. Select the Rollup type as “sum”.
11. Select the field to aggregate as “rice taken in shops”, and click Next → Next → Save..

The screenshot shows the Salesforce Object Manager interface for the 'rice mill' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Fields & Relationships' and shows a table of fields for the 'rice mill' object. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (CreatedBy, Lookup(User)), Last Modified By (LastModifiedBy, 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)), and rice taken (rice_taken__c, Roll-Up Summary (SUM consumer)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	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 5: Creating Fields in Objects

Creating the number field in rice details object

1. Go to the setup page → click on object manager → From drop down click edit for rice details object.
2. Click on fields & relationship → click on New.
3. Select Data type as “Number” and click Next.
4. Given the Field Label as “supplier name” and length as “5”.
5. Field Name will be auto populated, and click on Next→ Next → Save.

The screenshot shows the 'Custom Field Definition Detail' page for a new field named 'supplier name' in the 'rice details' object. The page includes tabs for Edit, Set Field-Level Security, View Field Accessibility, and Where is this used?. The field information is displayed in a table with the following details: Field Label (supplier name), Field Name (supplem_ame), API Name (supplem_ame__c), Object Name (rice_details), and Data Type (Number). The page also shows the field's description, help text, data owner, field usage, data sensitivity level, and compliance categorization. The field was created by Likhitha Batta on 27/06/2024 at 12:04 pm and modified by Likhitha Batta on the same date and time.

Field Information	Field Label	Field Name	API Name	Description	Help Text	Data Owner	Field Usage	Data Sensitivity Level	Compliance Categorization
supplier name	supplem_ame	supplem_ame__c							

Activity 6: Creating Fields in rice mill Objects

1. Select Data type as “Number” and click Next.
2. Given the Field Label as “rice price/kg” and length as “5”

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'rice mill Custom Field' and 'rice price/kg'. It includes a 'Back to rice mill' link and a 'Validation Rules (0)' button. Below this is the 'Custom Field Definition Detail' section with tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table lists the following details:

Field Label	Field Name	API Name	Description	Help Text	Data Owner	Field Usage	Data Sensitivity Level	Compliance Categorization	Created By	Modified By
rice price/kg	rice_price__kg	rice_price__kg__c							Lihitha Batta	27/06/2024, 12:07 pm

Additional information shown includes Object Name: rice mill and Data Type: Number.

Activity 7: Creating Fields in consumer Objects

The screenshot shows the Salesforce Setup interface for the 'consumer' object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), 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, and Scoping Rules. The main content area is titled 'Fields & Relationships' and shows 14 items, sorted by Field Label. The table lists the following fields:

Field Label	Field Name	Data Type	Field Type
email	email__c	Email	Text(255)
First name	First_name__c	Text(60)	Text(60)
Last Modified By	LastModifiedById	Lookup(User)	Lookup(User)
Last name	Last_name__c	Text(60)	Text(60)
Mode of payment	Mode_of_payment__c	Picklist	Picklist
Phone number	Phone_number__c	Phone	Phone
rice mill name	rice_mill_name__c	Master-Detail(rice mill)	Master-Detail(rice mill)
Rice taken by shops	Rice_taken_by_shops__c	Number(5, 0)	Number(5, 0)
rice taken by shops in kgs	rice_taken_by_shops_in_kgs__c	Number(18, 0)	Number(18, 0)
Rice type	Rice_type__c	Picklist	Picklist

Activity 8: Creating Cross Object Formula Field in consumer Object

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

1. Go to setup → click on Object Manager → type object name(consumer) in search bar → click on the object.
2. Click on fields & relationship → click on New.
3. Select Data type as “Formula” and click Next.

4. Give Field Label and Field Name as “Amount Paid ” and select formula return type as “Number” and click next.

5. Insert fields formula should be :

rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c

6. Under Advanced Formula write down the formula and click “Check Syntax” and Save.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The main content area is titled 'consumer Custom Field Amount Paid' and shows the 'Custom Field Definition Detail' for the 'Amount Paid' field. The field information includes: Field Label 'Amount Paid', Field Name 'Amount_Paid', API Name 'Amount_Paid__c', and Object Name 'consumer'. The formula options section shows the data type as 'Formula' and the decimal places as '2'. The formula text is 'Rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c'.

1. **Creating the Formula field in consumer Object**

2. Go to setup → click on Object Manager → type object name(consumer) in search bar → click on the object.

3. Click on fields & relationship → click on New.

4. Select Data type as “Formula” and click Next.

5. Give Field Label and Field Name as “Consumer Name” and select formula return type as “TEXT” and click next.

6. Insert field formula should be : First_Name__c + ' ' + Last_Name__c

7. click “Check Syntax” and Save.

consumer Custom Field
Consumer Name
[Back to consumer](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information		Object Name
Field Label	Consumer 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	Lakshya Batta, 29/06/2024, 9:47 pm	Modified By Lakshya Batta, 29/06/2024, 9:47 pm

Formula Options

Data Type	Formula
Text	First_name__c + " " + Last_name__c

Activity 9 : Creating the validation rule

A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of “True” or “False”. Validation rules also include an error message to display to the user when the rule returns a value of “True” due to an invalid value.

Creating the validation rule for phone number field in consumer object

- Go to the setup page → click on object manager → From drop down click edit for consumer object.
- Click on the validation rule → click New.
- Enter the Rule name as “Phonenumberoremailblankrule”.
- Enter the description as “phone number and email number should not be blank”.
- Enter the formula as “OR(ISBLANK(phone_number__c) , ISBLANK(email__c))” and check the syntax.
- Under the error message write as “please fill in your phone number.”
- Select error location “top of page”.
- Save the validation rule.

consumer Validation Rule
[Back to consumer](#)

Validation Rule Detail [Edit](#) [Clone](#)

Rule Name	Phonenumberoremailblankrule	Active	<input checked="" type="checkbox"/>
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	Lakshya Batta, 29/06/2024, 10:45 pm	Modified By	Lakshya Batta, 29/06/2024, 10:45 pm

[Edit](#) [Clone](#)

Milestone 6: Page layouts

Page Layout in Salesforce allows us to customize the design and organize detail and edit pages of records in Salesforce. Page layouts can be used to 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

1. Go to Setup → Click on Object Manager → Search for the object (consumer) → From drop down select the object and click on it.
2. Click on Page layout → Click on New.
3. Select the existing page layout, and give the page layout name as “consumer layout”, and click save.
4. Drag and drop the section field to consumer details and create the section.
5. Enter the section name as “Personal details”, → click Ok.
6. Now drag the fields to this section that mentioned , they are
 1. First name , last name , consumer name , phone number, email, rice mill name.
7. Follow the same process for another two sections as shown above , they are
 1. One section is “ rice details ” , drag the fields that are
 1. Rice taken by shop, rice type.
 2. Another section is “Receipt details ”, and drag the fields that are
 1. Mode of payment , Amount paid.
10. Then , Click save.

The screenshot shows the Salesforce Setup interface for the 'consumer' object. The 'Page Layouts' tab is active, and a new page layout is being configured. The layout is named 'consumer layout'. The layout structure is as follows:

- Personal details**
 - First name: Sample Text
 - Last name: Sample Text
 - consumer Name: GEN-2004-001234
 - Phone number: 1-415-555-1212
 - email: sarah.sample@company.com
 - rice mill name: Sample Text
- rice details**
 - Rice taken by shops: 31,342
 - Rice type: Sample Text
- Receipt details**
 - Mode of payment: Sample Text
 - Amount Paid: 555.22

Milestone 7 : 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.

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

1. Contract Manager
2. Read Only
3. Marketing User
4. Solutions Manager
5. Standard User
6. System Administrator.

We cannot delete standard ones

Each of these standard ones includes a default set of permissions for all the standard objects available on the platform.

2. Custom Profiles:

Custom ones defined by us.

They can be deleted if there are no users assigned with that particular one.

Activity 1: owner Profile

To create a new profile:

1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (Standard User) → enter profile name (owner) → Save.
2. Scroll down to Custom Object Permissions and Give access permissions for consumers, rice details, rice mill and suppliers objects as mentioned in the below diagram.
2. Give access and save it.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'profiles' entered and a list of 'Profiles'. The main content area is titled 'Standard User' and shows a list of permissions for this profile. The 'Profile Detail' section at the bottom shows the profile name 'Standard User', the user license 'Salesforce', and the creation/modification details. The 'Custom Profile' checkbox is unchecked.

Profile Detail	
Name	Standard User
User License	Salesforce
Created By	salesforce.com, inc., 25/06/2024, 3:47 pm
Modified By	Lehima Batta, 29/06/2024, 9:47 pm

Activity 2: employer Profile

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

Activity 3: worker Profile

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

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'profiles' entered. The main content area is titled 'Standard Platform User' and includes a table of profiles. The table has the following data:

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	ra_ragu	raa	ra_ragu1234@gmail.com	worker	✓	Standard Platform User
Edit	ram_ram	ram	lkhithab25@gmail.com	employer	✓	Standard Platform User

Milestone 8: Role & Role Hierarchy

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

Activity 1: Creating owner Role

1. Go to quick find → Search for Roles → click on set up roles.
2. Go to quick find → Search for Roles → click on set up roles.
3. Click on Expand All and click on add role under whom this role works.
4. Give Label as “owner” and Role name gets auto populated. Then click on Save.
5. Click and save it.

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Roles' is selected under 'Users'. The main content area is titled 'Roles' and shows the details for the 'owner' role. Below the role name, there is a description: 'Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.' The role hierarchy is listed as 'Srinivasa Ramanujan Institute of Technology » CEO » owner'. The role's label is 'owner', and its role name is 'owner'. The role reports to the 'CEO' role. The role's sharing groups are 'Role, Role and Internal Subordinates'. The role's opportunity access is 'Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities'. The role's case access is 'Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases'. Below the role details, there is a table titled 'Users in owner Role' with columns for 'Action', 'Full Name', 'Alias', 'Username', and 'Active'. The table contains one user: 'vicky.y' with alias 'yy' and username 'lkthab2612@gmail.com'.

Activity 2: Creating employer roles

Creating another two roles under manager

1. Go to quick find → Search for Roles → click on set up roles.
2. Click plus on CEO role, and click add role under owner.
3. Give Label as “employer” and Role name gets auto populated. Then click on Save.
4. Repeat the same steps, for another role.
5. Click plus on CEO role, and click plus on owner, and click add role under employer.
6. give Label as “worker” and Role name gets auto populated. Then click on Save.

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Roles' is selected under 'Users'. The main content area is titled 'Roles' and shows the 'Creating the Role Hierarchy' section. Below the title, there is a description: 'You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.' The role hierarchy is shown as a tree view. The root node is 'Srinivasa Ramanujan Institute of Technology'. It has a child node 'CEO'. The 'CEO' node has a child node 'owner'. The 'owner' node has a child node 'employer'. The 'employer' node has a child node 'worker'. The 'worker' node has a child node 'SVP_Customer_Service_Support'. The 'SVP_Customer_Service_Support' node has a child node 'SVP_Human_Resources'. The 'SVP_Human_Resources' node has a child node 'SVP_Sales_Marketing'. Each node has an 'Add Role' button next to it.

Milestone 9 : Users

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

Activity 1: Create User

1. Go to setup → type users in quick find box → select users → click New user.
2. Fill in the fields
3. First Name : vicky
4. Last Name : y
5. Alias : Give a Alias Name
6. Email id : Give your Personal Email id
7. Username : Username should be in this form: text@text.text
8. Nick Name : Give a Nickname
9. Role : owner
10. User license : Salesforce
11. Profiles : owner.

The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with 'Users' selected. The main area displays the 'User Detail' for a user named 'vicky y'. The user's email is 'liknitha2612@gmail.com' and their username is 'liknitha2612@gmail.com'. The user is active and has the 'Salesforce' license. The 'Role' is 'Owner'. The 'Profile' is 'owner'. The 'Marketing User' checkbox is checked. The 'Offline User' checkbox is unchecked. The 'Knowledge User' checkbox is unchecked. The 'Flow User' checkbox is unchecked. The 'Service Cloud User' checkbox is unchecked. The 'Site.com Contributor User' checkbox is unchecked. The 'Site.com Publisher User' checkbox is unchecked. The 'WDC User' checkbox is unchecked. The 'Mobile Push Registrations' checkbox is unchecked. The 'Data.com User Type' is 'Data.com User Type'. The 'Accessibility Mode (Classic Only)' is 'Classic Only'. The 'Debug Mode' is 'Debug Mode'. The 'High-Contrast Palette on Charts' is 'High-Contrast Palette on Charts'.

Activity 2: creating another users

1. First Name : ram
2. Last Name : ram
3. Alias : Give a Alias Name
4. Email id : Give your Personal Email id
5. Username : Username should be in this form: text@text.text
6. Nick Name : Give a Nickname
7. Role : employer
8. User license : Salesforce platform
9. Profiles : standard platform user.

The screenshot shows the Salesforce Setup interface for the 'Users' section. The user 'ram ram' is selected. The left sidebar shows the navigation menu with 'Users' highlighted. The main content area displays the 'User Detail' form for 'ram ram'.

User Detail	
Name	ram ram
Alias	rram
Email	ikthiab26@gmail.com [Verify]
Username	ikthiab26@gmail.com
Nickname	ram
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	
Manager	
Receive Approval Request Emails	Only if I am an approver
Federation ID	
Role	employee
User License	Salesforce Platform
Profile	Standard Platform User
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	View
Data.com User Type	1
Accessibility Mode (Classic Only)	1
Debug Mode	1
High-Contrast Palette on Charts	1

1. First Name : ragu
2. Last Name : raj
3. Alias : Give a Alias Name
4. Email id : Give your Personal Email id
5. Username : Username should be in this form: text@text.text
6. Nick Name : Give a Nickname
7. Role : worker
8. User license : Salesforce platform
9. Profiles : standard platform user.

The screenshot shows the Salesforce Setup interface for the 'Users' section. The user 'ragu raj' is selected. The left sidebar shows the navigation menu with 'Users' highlighted. The main content area displays the 'User Detail' form for 'ragu raj'.

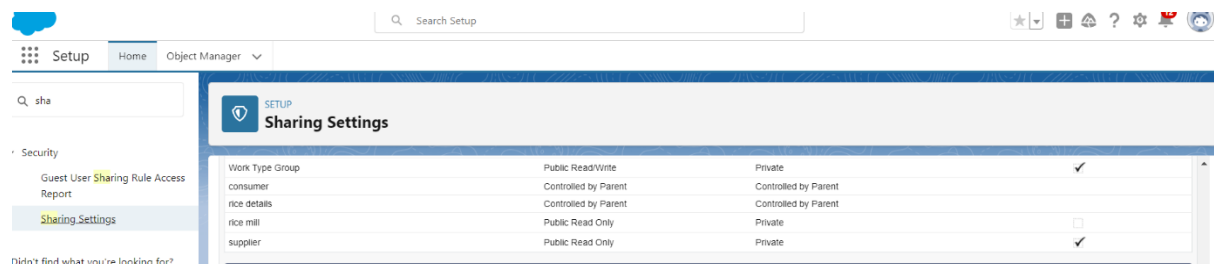
User Detail	
Name	ragu raj
Alias	rraj
Email	ragu1234@gmail.com [Verify]
Username	ragu1234@gmail.com
Nickname	raj
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	
Manager	
Receive Approval Request Emails	Only if I am an approver
Federation ID	
Role	worker
User License	Salesforce Platform
Profile	Standard Platform User
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	View
Data.com User Type	1
Accessibility Mode (Classic Only)	1
Debug Mode	1
High-Contrast Palette on Charts	1

Milestone 10 : Permission sets

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

Activity 1: Creating OWD setting.

1. Go to setup → type “sharing settings ” in quick search → Click edit.
2. Scroll down, change the default internal access to “ public read-only” for rice mill and supplier object.
3. Click save.



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 schedule the reports. Salesforce provides a powerful suit of analytic tools to help you organize, view and analyze data.

Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

1. Tabula Reports: Simple listing of data without any subtotals. This type of reports provide you most basically to look at your data. Use tabular reports when you want a simple list or a list of items with a grand total.

Example: This type of reports are used to list all accounts, List of contacts, List of opportunities.....etc.....

2. Summary Reports: This type of reports provide a listing of data with groupings and sub totals. Use summary reports when you want subtotals based on the value of a particular field or when you want to create a hierarchically grouped report, such as sales organized by year and then by quarter.

Example: All opportunities for your team sub totaled by Sales Stage and Owner.

3. Matrix Reports: This type of reports allow you to group records both by row and by column. A comparison of related totals, with totals by both row and column. Use matrix reports when you want to see data by two different dimensions that aren't related, such as date and product.

Example: Summarize opportunities by month vertically and by account horizontally.

4. Joined Reports: Blocks of related information in a single report. This type of reports enable you to adopt five different blocks to display different types of related data. Each block can own unique columns, summary fields, formulas, filters and sort order. Use joined reports to group and show data from multiple report types in different views.

Example: You can build a report to show opportunity, case and activity data for your accounts.

Activity 1: Create Report

1. Go to the app → click on the reports tab
2. Click New Report.
3. select for report type, search for “rice mill with consumers” click on it. And click on start report.
1. Their outline pane is opened already, select the fields that are mentioned below in the column section.
 - 1.consumer name
 - 2.rice type
 - 3.rice price/kg
 - 4.mode of payments
 - 5.amount paid
2. Remove the unnecessary fields.
3. Select the fields that are mentioned below in the GROUP ROWS section.
 - a. Rice taken by shops.

The screenshot shows the Salesforce Report Builder interface. The report is titled "rice mills with consumers" and is grouped by "Rice taken by shops". The columns displayed are Consumer Name, Rice type, rice price/kg, Mode of payment, and Amount Paid. The report shows a subtotal for "Rice taken by shops" and a grand total.

Rice taken by shops	Consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
5 (9)	raj N	1.basmati	50	Net banking	250.00
	neha r	1.basmati	60	UPI	300.00
	usha G	2.normal rice	50	Cash	250.00
	nikil e	1.basmati	50	Debit card	250.00
	likhitha B	1.basmati	55	Net banking	275.00
	ramu I	1.basmati	50	Debit card	250.00
	chukki G	2.normal rice	56	Cash	280.00
	Jhon T	2.normal rice	50	Net banking	250.00
	harry w	1.basmati	56	Debit card	280.00
Subtotal			271		2,385.00
8 (1)	suma R	1.basmati	55	UPI	440.00
Subtotal			55		440.00
Total (10)			271		2,825.00

Activity 2: Sharing report to owner

1. Click edit drop down and select subscribe option
2. After selecting the run report as a “another person” select your personal account or whom you want to send that mail to.
3. Click save.

Activity 3: create a report folder

1. Click on the app launcher and search for reports.
2. Double click on the report, “ reports tab” will be auto populated in the navigation bar.
3. Click on the report tab, click on the new folder.
4. Give the Folder label as “estimated rice per day”, Folder unique name will be auto populated.
5. Click save.

Reports

Recent

1 item

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	range of amount per day		estimated rice per day	Likhitha Batta	1/7/2024, 7:17 pm	✓

Created by Me

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.

Activity 1: Create Dashboard Folder

1. Click on the app launcher and search for the dashboard.
2. Click on the dashboard tab.
3. Click the new folder, give the folder label as “ amount data dashboard”.
4. Folder unique names will be auto populated.
5. Click save.

Dashboards

Recent

1 item

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	estimated data	total amount of data in dashboards	amount data dashboard	Likhitha Batta	1/7/2024, 7:56 pm	✓

Created by Me

Activity 2: Create Dashboard

1. Go to the app → click on the Dashboards tabs.
2. Give a Name and select the folder that was created, and click on create.
3. Select add component.
4. Select a Report and click on select.

Select Report

Reports

Recent

Created by Me

Private Reports

Public Reports

Select Report

Search Reports and Folders...

Reports and Folders ▾

range of amount per day

Likhitha Batta - 05-Jul-2024, 1:58 pm - estimated rice per day

1. Preview is shown below.

Display as- vertical bar chart

X-axis - rice taken by shops

Y-axis- sum of amount

Y-axis range - automatic

Sort by - rice taken by shops

Component theme - dark.

Add the component

Add Widget

100

Title

range of amount per day

Subtitle

Footer

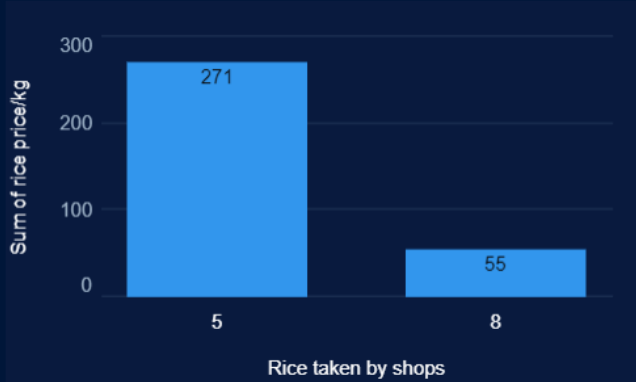
Widget Theme

☐ Light (Dashboard default)

☒ Dark

Preview

range of amount per day



Rice taken by shops	Sum of rice price/kg
5	271
8	55

View Report (range of amount per day)

Cancel

Add

Again select add component with above same steps

1.display as donut chart

2.sort by - sum of amount

3.title-range of amount per day

4.component theme dark

Click add.

Click save and done.

Add Widget

Display Units

Shortened Number

☒ Show Values

☒ Show Percentages

☒ Combine Small Groups into "Others"

☒ Show Total

Decimal Places

Automatic

Sort By

Sum of rice price/kg

Custom Link

Max Values Displayed

6

Preview

range of amount per day

Sum of rice price/kg

271

55 (16.87%)

271 (83.13%)

Rice taken by sh...

5

8

View Report (range of amount per day)

Cancel

Add