

A CRM
APPLICATION
FOR
WHOLESALE
RICE MILL

By
THAMMI SHRUTHI
thammishruthi1@gmail.com

PROJECT ABSTARCTION

The Rice Mill CRM Application is a comprehensive solution designed to streamline and simplify how much rice per day, how many were sold that rice and which type of rice all reports send to owners daily wise. It leverages the power of customer relationship management (CRM) to enhance customer experiences, optimize store operations, and improve overall efficiency in the rice mill factory. This project aims to develop a user-friendly and feature-rich application that addresses the specific needs of a rice mill factory.

Features and Functionality:

Reporting and Dashboards: The application can generate detailed reports and analytics regarding daily how much rice sold and total income per daily, revenue generated, popular amenities, and most buyed customers. Easy to understand the data to the owner, improving resource allocation, and planning future development.

A rollup summary field: This 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. For example, you could use a rollup summary field to display the total value (amount of rice supplied) from rice details on a related supplier.

A cross-object formula field: It is a formula field that references fields from another object in Salesforce. This type of formula allows users to calculate the total amount from number of rice taken * price/kg and it displays the total amount I have to pay.

Validation rules: 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. so, In this project i gave Isblank formula. Isblank formula is used to verify whether it is blank it shows error.

Permission sets: Organization Wide Defaults(OWD) in salesforce is the baseline level of access that the most restricted user should have. Organizational Wide Defaults are used to restrict access. But in our case we created roles and given the roles in such a way that the owner can see employer and worker records, and the employer can see the worker records.

Pre-requisites

Salesforce Developer account

Knowledge of the salesforce admin concepts.

Installed with 2 web browsers in the Machine

Good internet connectivity.

INDEX PAGE

TASKS:

Introduction

- Creating Developer Account
- Account Activation
- Creating the Objects
- Creating the Tabs
- Creating the Lightening App
- Creating the fields
- Creating the page Layouts
- Creating the Profiles
- Roles and Hierarchy
- Creating the users
- Permission Sets
- Creating the Reports
- Creating the Dashboards
- APEX

INTRODUCTION

In the competitive landscape of the rice milling industry, effective management of customer relationships is crucial for success. A Customer Relationship Management (CRM) application designed specifically for wholesale rice mills offers a streamlined approach to enhance customer interactions, optimize sales processes, and manage inventory efficiently.

Key Features:

1. **Customer Management:** Centralize customer data, including contact details, purchase history, and preferences, to provide personalized service and build stronger relationships.
2. **Sales Tracking:** Monitor sales activities in real-time, analyze sales performance, and identify trends to make informed business decisions.
3. **Inventory Management:** Keep track of rice stocks, including different varieties, quantities, and expiration dates, ensuring timely replenishment and reducing wastage.
4. **Order Processing:** Simplify the order-taking process with an intuitive interface, allowing for quick order entries, confirmations, and invoicing.
5. **Reporting and Analytics:** Generate reports on sales performance, customer behavior, and inventory levels to gain insights and strategize effectively.
6. **Communication Tools:** Facilitate communication with customers through integrated email and messaging features, ensuring timely follow-ups and support.
7. **Mobile Access:** Enable sales representatives to access the CRM on the go, allowing for real-time updates and customer engagement.

Benefits:

- **Enhanced Customer Service:** Improved response times and personalized interactions lead to higher customer satisfaction and loyalty.
- **Increased Sales Efficiency:** Streamlined processes reduce time spent on administrative tasks, allowing more focus on sales activities.

- **Better Inventory Control:** Accurate tracking of stock levels minimizes the risk of overstocking or stockouts.
- **Data-Driven Decisions:** Access to comprehensive analytics helps in identifying opportunities for growth and optimizing operations.

This CRM application serves as a vital tool for wholesale rice mills to effectively manage their operations and build lasting customer relationships, ultimately driving growth and profitability.

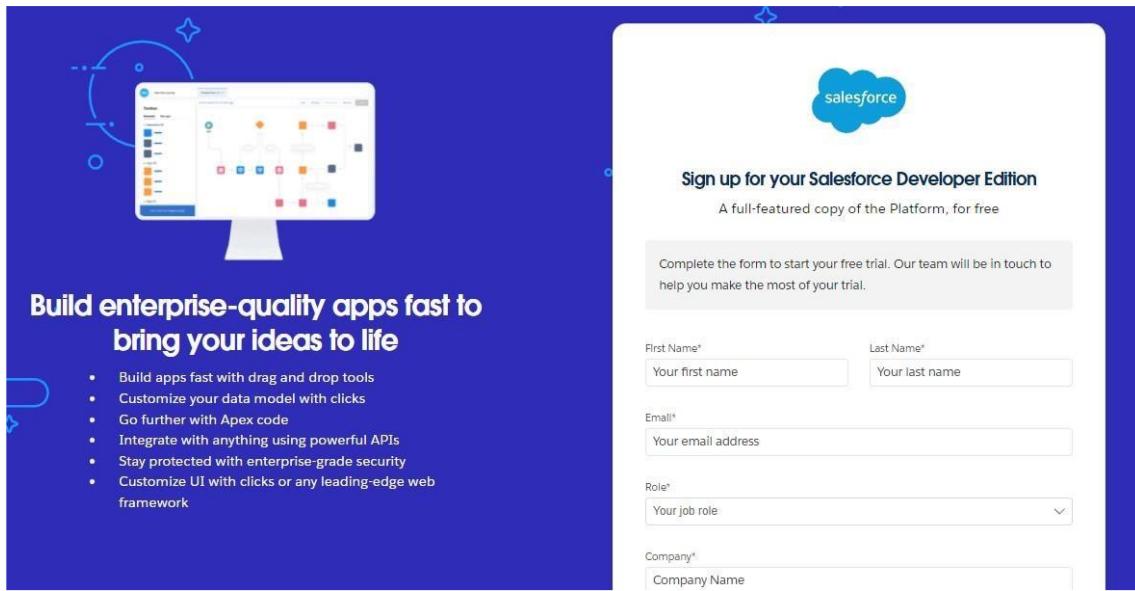
TASK-1:

Creating Developer Account:

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :
 3. First name & Last name
 4. Email
 5. Role : Developer
 6. Company : College Name
 7. County : India
 8. Postal Code : pin code
 9. Username : should be a combination of your name and company

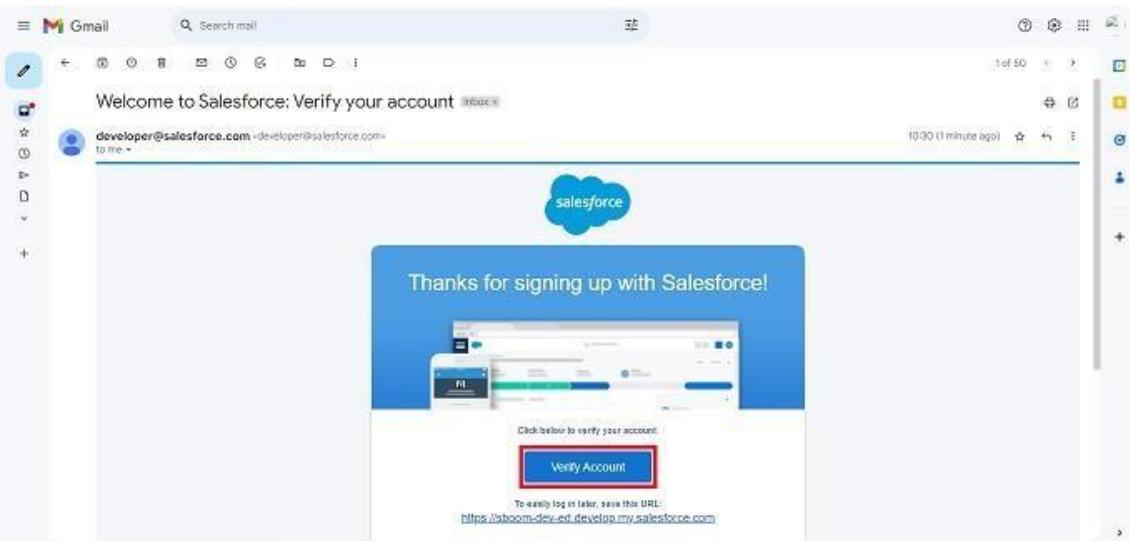
This need not be an actual email id, you can give anything in the format :
username@organization.com

Click on sign me up after filling these.



Account Activation:

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



2 Click on Verify Account

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

Change Your Password

Enter a new password for lead@sb.oom.
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

* Confirm New Password
..... Match

Security Question
▼ In what city were you born?

* Answer
asdfghjkl

Change Password

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

The screenshot shows the Salesforce Setup Home page. The top navigation bar includes a blue cloud icon, a search bar labeled 'Search Setup', and various navigation buttons. The main content area is titled 'SETUP Home' and features three promotional cards:

- Get Started with Einstein Bots**: Launch an AI-powered bot to automate your digital connections. Includes a 'Get Started' button.
- Mobile Publisher**: Use the Mobile Publisher to create your own branded mobile app. Includes a 'Learn More' button.
- Real-time Collaborative Docs**: Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce. Includes a 'Get Started' button.

The left sidebar contains a navigation menu with links such as 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', and 'ADMINISTRATION' (with a 'Users' sub-link).

TASK-2:

Creating the Objects:

What Is an Object?

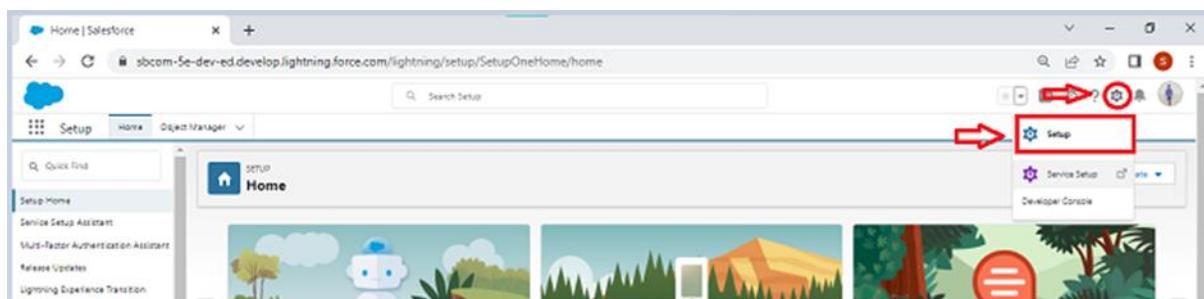
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

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

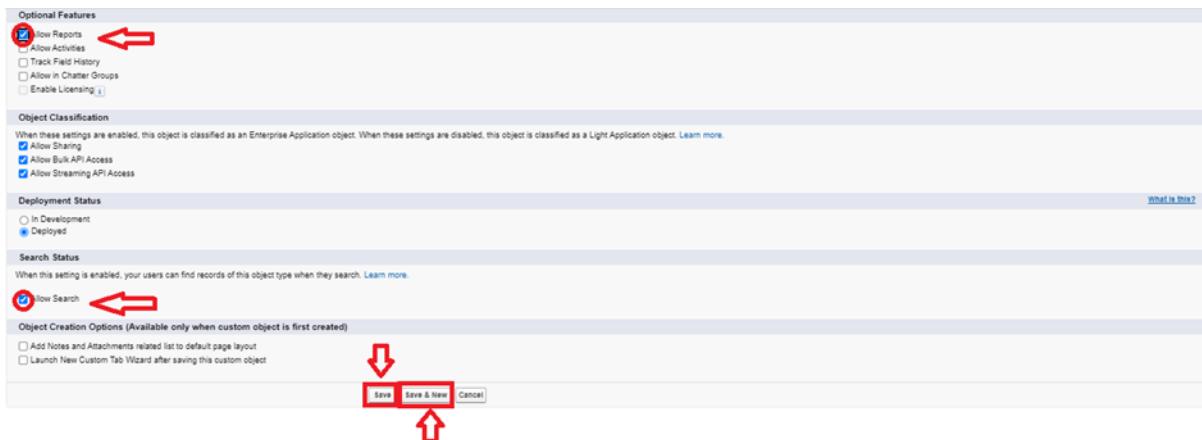


To create an object:

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.

i.Create Supplier Object

To create an object:

1. From the setup page >> Click on Object Manager>> Click on Create>>Click on Custom Object.
1. Enter the label name>>supplier
2. Plural label name>>supplier
3. Enter Record Name Label and Format
 - Record Name >> supplier Name
 - Data Type>>Text
2. Click on Allow reports and Track Field History and allow search
3. Allow search >> Save.

ii. Create Rice mill Object

To create an object:

1. From the setup page >> Click on Object Manager>>Click on Create >> Click on Custom Object.
1. Enter the label name>>rice mill
2. Plural label name>> rice mills
3. Enter Record Name Label and Format
 - Record Name >>
 - Data Type >> Auto Number
 - Display Format >> rice-{000}
 - Starting number >> 1
2. Click on Allow reports and Track Field History, Allow Search and Save.

iii. 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
 - label name >> consumer
 - Plural label name >> consumers
 - Display Format >> consumers-{000}
 - Starting number >> 1

iv. Create rice details Objects

1. Use these display format for the rice details
 - label name >> rice details
 - Plural label name >> rice details
 - Display Format >> rice-{000}
 - Starting Number >>1
-

TASK 3: CREATE 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:

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.

Web Tabs

Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.

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.

Lightning Component Tabs

Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

Lightning Page Tabs

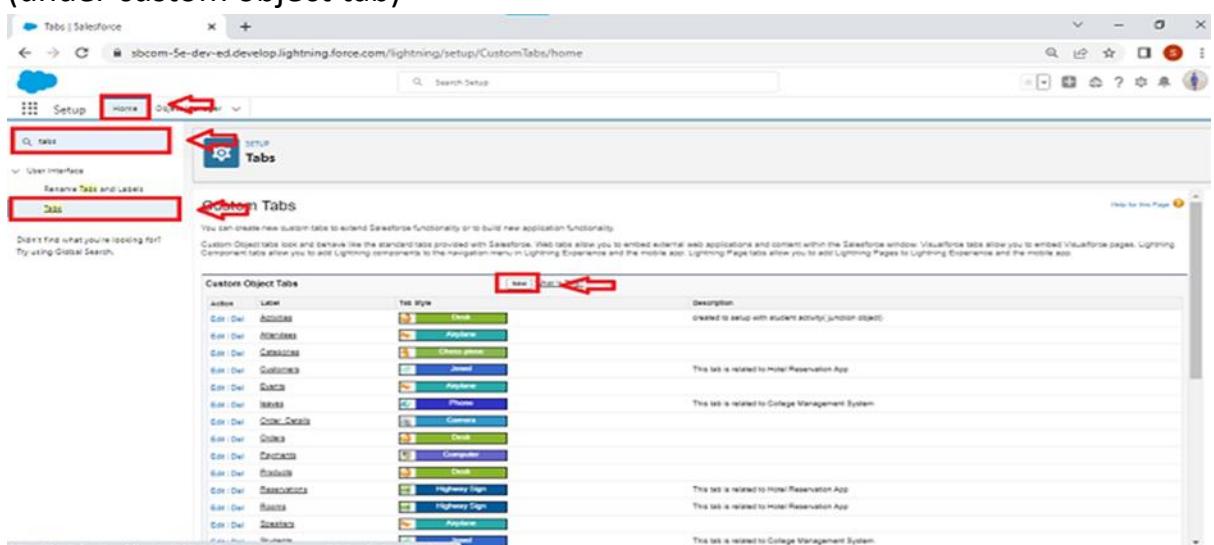
Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

i. Creating a Custom Tab

To create a Tab:(supplier)

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



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

SETUP
Tabs

Edit Custom Object Tab
suppliers

Fill in the fields below to define the custom tab.

Custom Tab Definition Edit

Custom Object Tab Information

Tab Label: suppliers
Object: supplier
Tab Style:  Box 

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link:

Enter a short description:

Tab Style Selector **Create your own style**

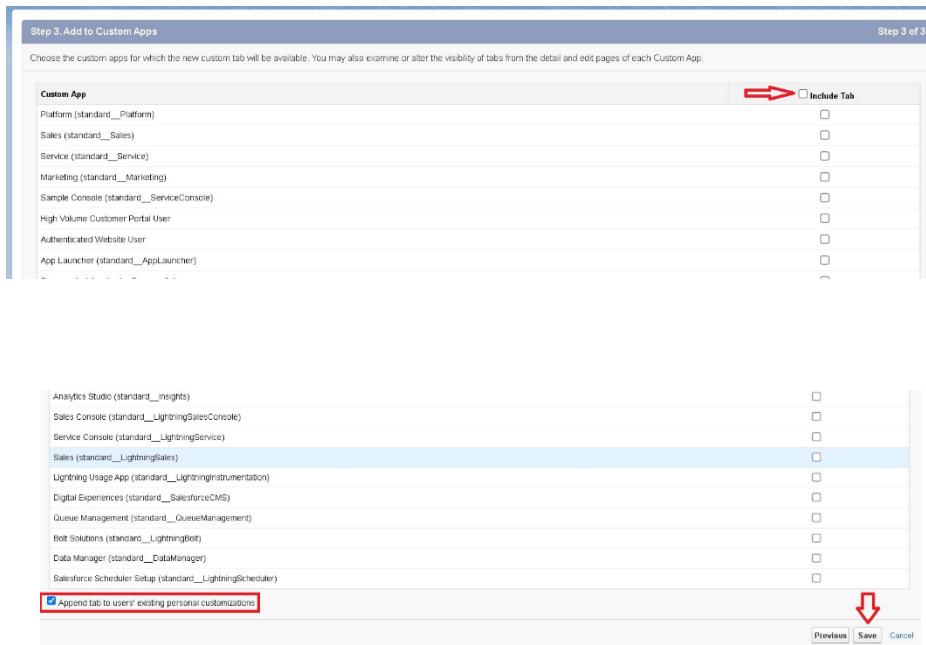
Hide styles which are used on other tabs

 Airplane	 Alarm clock	 Apple	 Balls
 Bank[1]	 Bell	 Big top	 Boat[1]
 Books	 Bottle	 Box	 Bridge
 Building	 Building Block	 Caduceus	 Camera
 Can	 Car	 Castle	 CD/DVD
 Cell phone	 Chalkboard	 Chess piece	 Chip
 Circle	 Compass	 Computer	 Credit card
 CRT TV	 Cup	 Desk[1]	 Diamond
 Dice	 Factory	 Fan	 Flag
 Form	 Gears	 Globe	 Guitar
 Hammer	 Hands	 Hand saw	 Headset
 Heart[1]	 Helicopter	 Hexagon	 Highway Sign
 Hot Air Balloon	 Insect	 IP Phone	 Jewel
 Keys	 Laptop	 Leaf	 Lightning

Step 3. Add to Custom Apps **Step 3 of 3**

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	 <input type="checkbox"/> Include Tab
Platform (standard_Platform)	<input type="checkbox"/>
Sales (standard_Sales)	<input type="checkbox"/>
Service (standard_Service)	<input type="checkbox"/>
Marketing (standard_Marketing)	<input type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>



ii. 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 .
-

TASK 4: CREATE THE LIGHTNING APP

The Lightning App

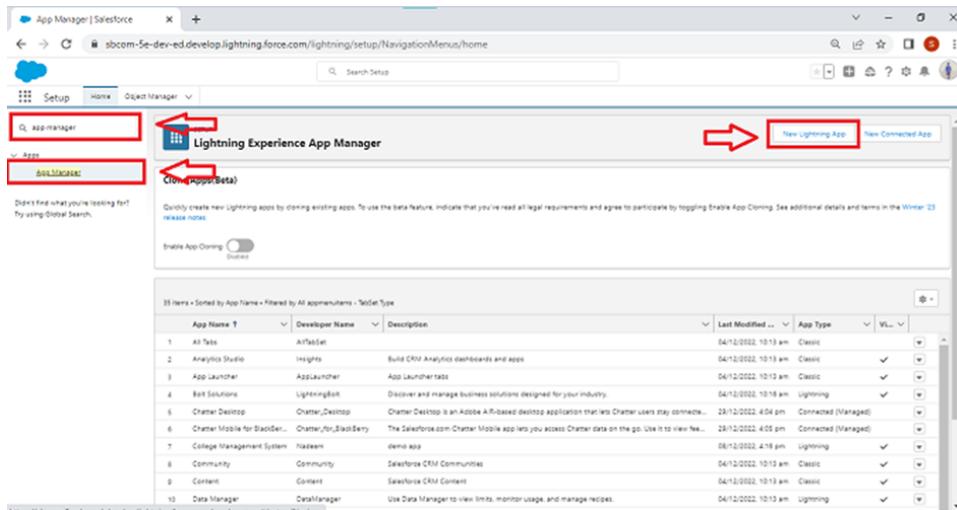
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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.

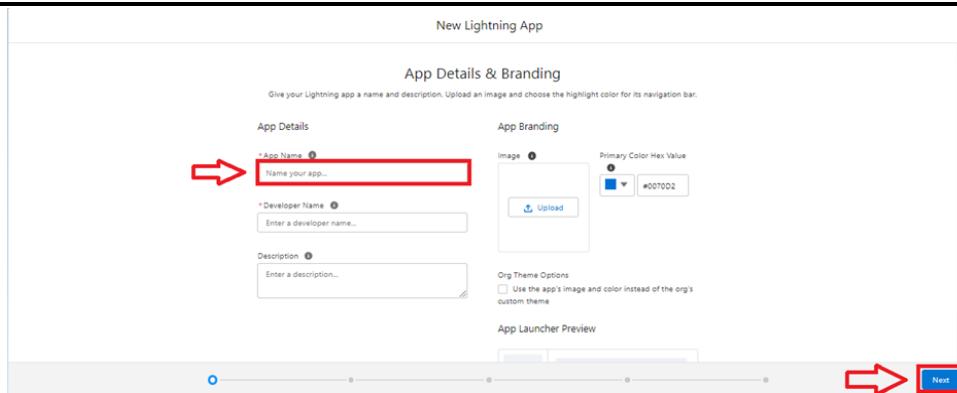
Create a Lightning App

To create a lightning app page:

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

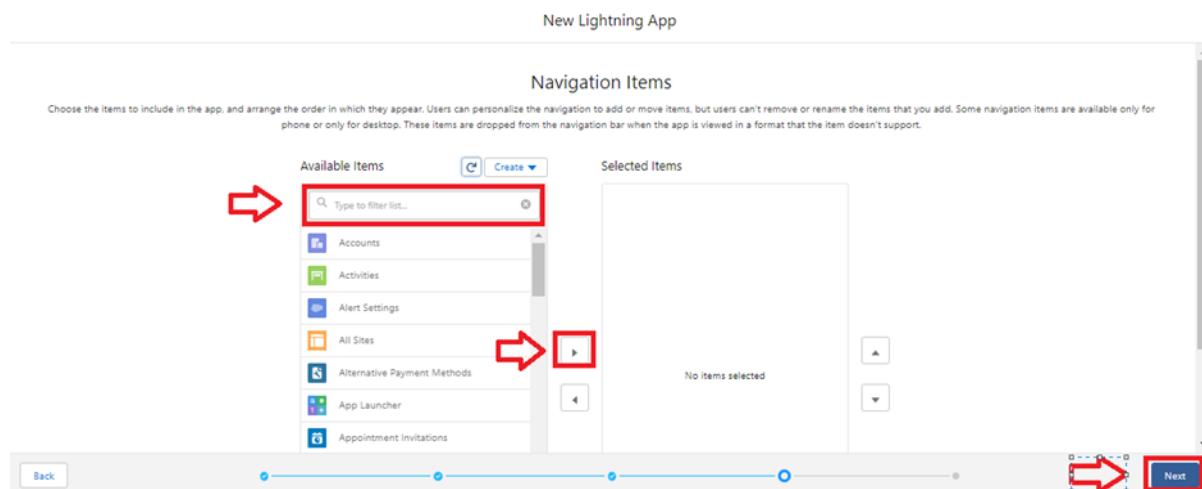


2. Fill the app name in app details as MY RICE >> Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.



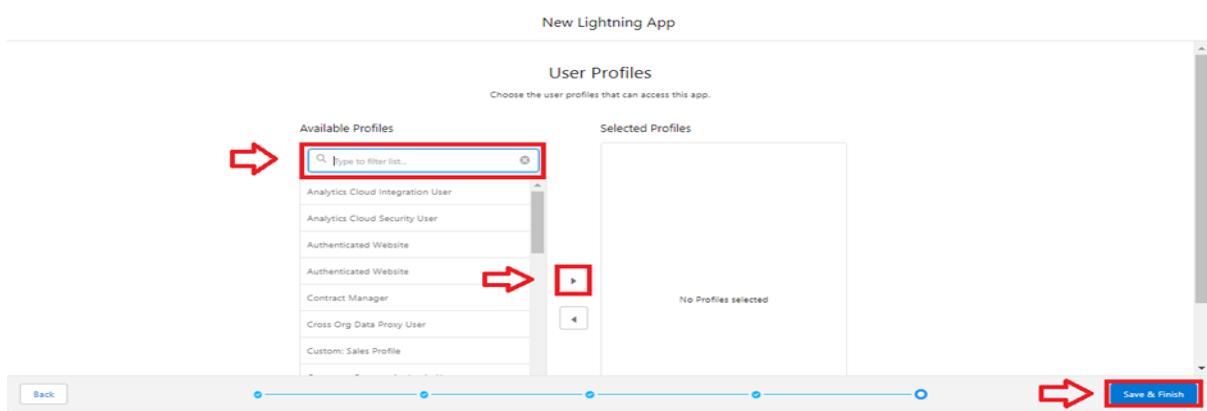
Upload a photo that is related to your app.

3. To add Navigation Item:



2. Select the items (supplier, rice mill, consumer , Rice details) from the search bar and move it using the arrow button >> Next

3. To Add User Profiles:



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

TASK 5: CREATE THE FIELDS

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.

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,

1. Created By
2. Owner
3. Last Modified
4. Field Made During object Creation

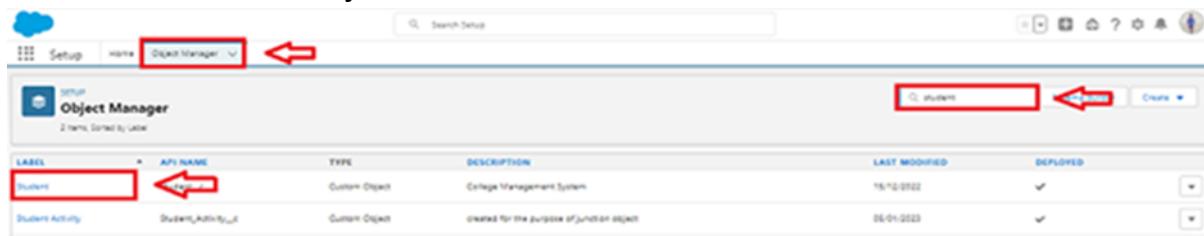
Custom Fields:

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.

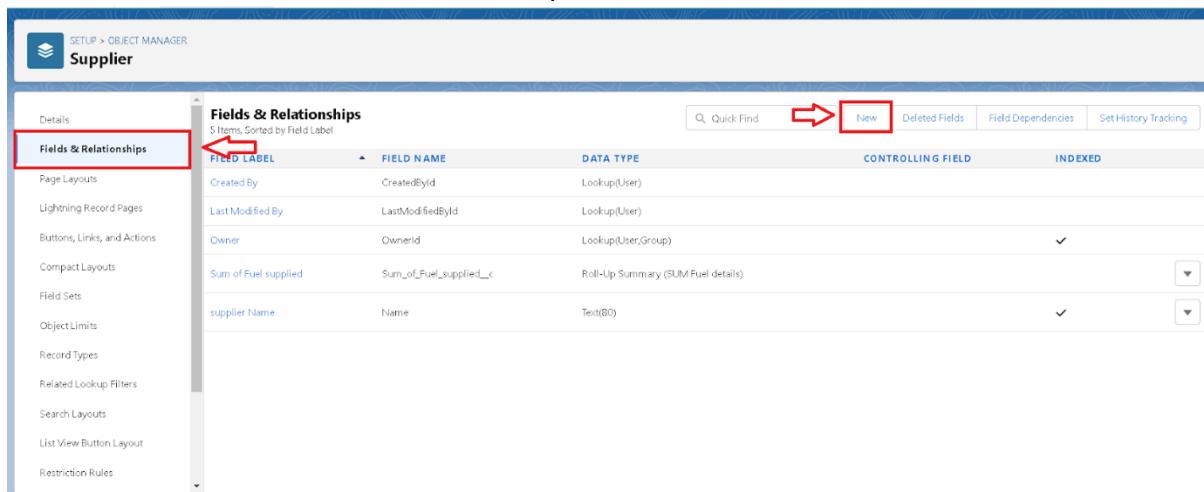
i.Creating the number field in rice details object

Creating the number field in rice details object

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



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.

Step 2. Enter the details Step 2 of 4

Field Label

Length Number of digits to the left of the decimal point

Decimal Places Number of digits to the right of the decimal point

Field Name

Description

Help Text

Required Always require a value in this field in order to save a record

Unique Do not allow duplicate values

External ID Set this field as the unique record identifier from an external system

AI Prediction Use this field to store AI prediction scores

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

Previous Next Cancel

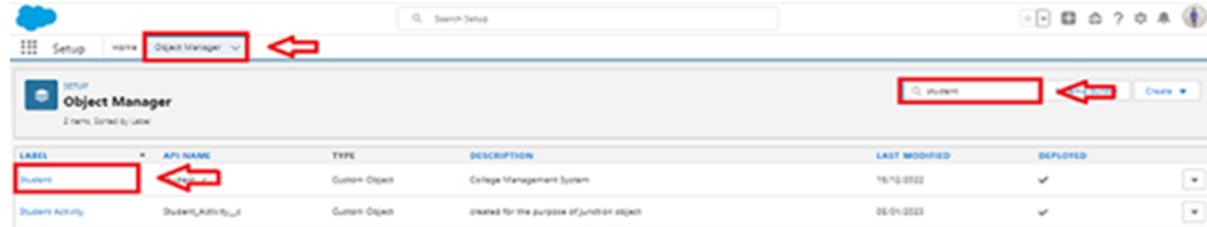
ii.Creating Junction Object

A Junction object is a custom object that serves as a bridge between two related objects in a many-to-many relationship. It allows you to create a relationship between records of two different objects by creating a many-to-many relationship model.

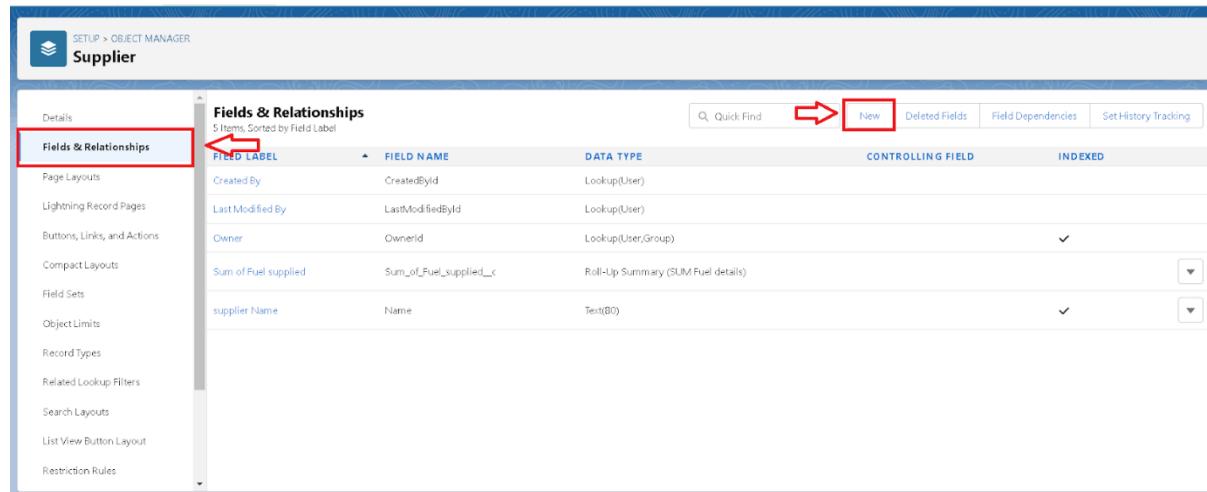
Creating junction object as rice details with supplier & rice mill

To create junction object

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



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



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

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary [?] A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship [?] Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

4. Select the related object “ supplier ” and click next.

Buyer New Relationship

Step 2. Choose the related object

Select the other object to which this object is related

Related To [?]

Help for this Page [?]

Step 2 of 6

Previous Next Cancel

Previous Next Cancel

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

ii.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. Here are a few use cases that demonstrate the use of master-detail relationships

Creating Master-Detail Relationship between consumer & rice mill Object

To Create a Master-Detail relationship

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

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

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

4. Select the related object “ rice mill ”.

5. Give Field Label as “rice mill name” and click Next.

6. Next >> Next >> Save.

ii. 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. For example, you could use a rollup summary field to display the total value (amount of rice supplied) from rice details on a related supplier.

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

3. 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.

Field Label: sum of rice distributed

Field Name: sum_of_rice_distributed

Description: the total amount of rice distributed to customer or shopowner

Help Text: (empty)

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

4. Select the summarized object as “ rice details ”.
5. Select the Rollup type as “sum”.
6. Select the field to aggregate as “ rice distributed ”, and click Next >>Next >>Save.

Select Object to Summarize

Master Object: seller

Summarized Object: rice details

Select Roll-Up Type

COUNT

SUM

MIN

MAX

Field to Aggregate: rice distributed

Filter Criteria

All records should be included in the calculation

Only records meeting certain criteria should be included in the calculation

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

15. Follow the same steps for the rice mill Object from 1 to 3
16. Give the Field label as “ rice taken ”,Field Name will be Auto generated, and click Next.
17. Select the summarized object as “ consumer ”.
18. Select the Rollup type as “sum”.
19. Select the field to aggregate as “ rice taken in shops ”, and click Next >> Next >> Save.

V. 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 “master detail” and click Next.
4. Given the Field Label as “ supplier name ” and length as “ 5 ”

Field Label	18	Decimal Places	0
Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".			
Length	18	Decimal Places	0
Field Name	Number of digits to the left of the decimal point		
Description	Number of digits to the right of the decimal point		
Help Text			
Required	<input type="checkbox"/> Always require a value in this field in order to save a record		
Unique	<input type="checkbox"/> Do not allow duplicate values		
External ID	<input type="checkbox"/> Set this field as the unique record identifier from an external system		
AI Prediction	<input type="checkbox"/> Use this field to store AI prediction scores		
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity		

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

VI. 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 ”.

VII. Creating Fields in consumer Objects:

S.no	Object name	Fields	data type						
1.	consumer	<table border="1"><tr><td>First name</td><td>Text</td></tr><tr><td>Last name</td><td>Text</td></tr><tr><td>Phone number</td><td>phone</td></tr></table>	First name	Text	Last name	Text	Phone number	phone	
First name	Text								
Last name	Text								
Phone number	phone								
		<table border="1"><tr><td>email</td><td>email</td></tr><tr><td>Rice taken by shops</td><td>Number (length=5)</td></tr></table>	email	email	Rice taken by shops	Number (length=5)			
email	email								
Rice taken by shops	Number (length=5)								
		<table border="1"><tr><td>Rice type</td><td>(Picklist values) 1.basmati 2.normal rice</td></tr></table>	Rice type	(Picklist values) 1.basmati 2.normal rice					
Rice type	(Picklist values) 1.basmati 2.normal rice								

		Mode of payment	Picklist values <ul style="list-style-type: none"> • Credit card • Debit card • Net banking • UPI • Cash
--	--	-----------------	---

VIII. Creating Cross Object Formula Field in consumer Object

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

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

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

Step 2. Choose output type

Step 2 of 5

Field Label Field Name Previous Next Cancel

Auto add to custom report type Add this field to existing custom report types that contain this entity [\(i\)](#)

Formula Return Type

None Selected Select one of the data types below.

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

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

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

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

Number Calculate a numeric value.
Example: `(Fahrenheit = 1.8 * Celsius_c + 32)`

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

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 a formula editor interface. At the top, there are tabs for "Simple Formula" and "Advanced Formula", with "Simple Formula" selected. Below the tabs, there are buttons for "Insert Field", "Insert Operator", and a dropdown menu for "Functions". The formula field contains the text "amount paid (Number) = rice_taken_by_shops_c * rice_mill_name_r.rice_price_kg_c". A "Check Syntax" button at the bottom left shows a green message: "No syntax errors in merge fields or functions. (Compiled size: 67 characters)". To the right of the formula field is a list of functions: ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN. A button "Insert Selected Function" is located at the bottom right of this list.

1. Creating the Formula field in consumer Object

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

2. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
3. Click on fields & relationship >> click on New.
4. Select Data type as “Formula” and click Next.
5. Give Field Label and Field Name as “Consumer Name” and select formula return type as “TEXT” and click next.
6. Insert field formula should be : First_Name_c + ' ' + Last_Name_c
7. click “Check Syntax” and Save.

The screenshot shows a formula editor interface, identical to the one in the previous image. It has the "Simple Formula" tab selected, with "amount paid (Number) = rice_taken_by_shops_c * rice_mill_name_r.rice_price_kg_c" in the formula field. The "Check Syntax" button at the bottom left shows a green message: "No syntax errors in merge fields or functions. (Compiled size: 67 characters)". The list of functions on the right is the same as in the previous image.

8.

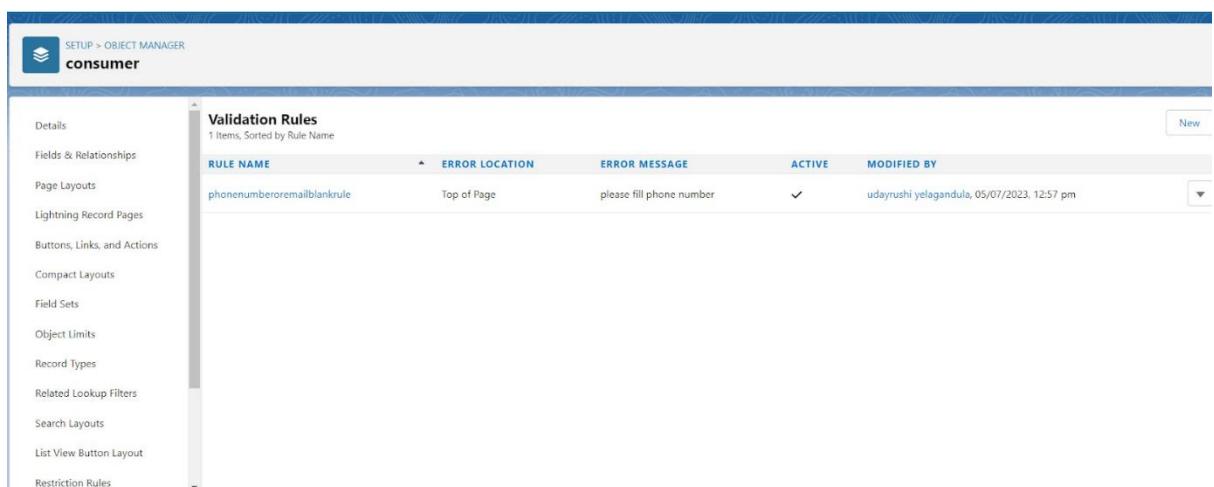
X: Creating the validation rule

Improve the quality of your data using validation rules. Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. 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

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

1. Go to the setup page >>click on object manager >> From drop down click edit for consumer object.
2. Click on the validation rule >> click New.



RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
phonenumeroremailblankrule	Top of Page	please fill phone number	✓	udayrushi yelagandula, 05/07/2023, 12:57 pm

3. Enter the Rule name as “Phonenumeroremailblankrule”.
4. Enter the description as “phone number and email number should not be blank”.
5. Enter the formula as “OR(ISBLANK(phone_number__c) , ISBLANK(email__c))” and check the syntax.

WE SAVE WILL BE DISPLAYED AND THE ERROR MESSAGE WILL BE DISPLAYED. THE USER CAN UPDATE THE DATA AND TRY AGAIN.

Validation Rule Edit

Save Save & New Cancel

Rule Name: phonenumeroremailblankrule

Active:

Description: phone number and email should not be blank

Quick Tips

- Operators & Functions

Error Condition Formula

Example: Discount_Percent_c>0.30 More Examples...

Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

Insert Field Insert Operator OR(ISBLANK(phone_number_c), ISBLANK(email_c))

Functions

-- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

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

Check Syntax No errors found

3.

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

5.Select error location “top of page”.

Insert Field Insert Operator OR(ISBLANK(phone_number_c), ISBLANK(email_c))

ACOS
ADDMONTHS
AND
ASCII
ASIN

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

Error Message

Example: Discount percent cannot exceed 30%

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

Error Message: please fill phone number

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

Error Location: Top of Page Field

Save Save & New Cancel

4.

6.Save the validation rule.

TASK-6: Creating the Page Layouts

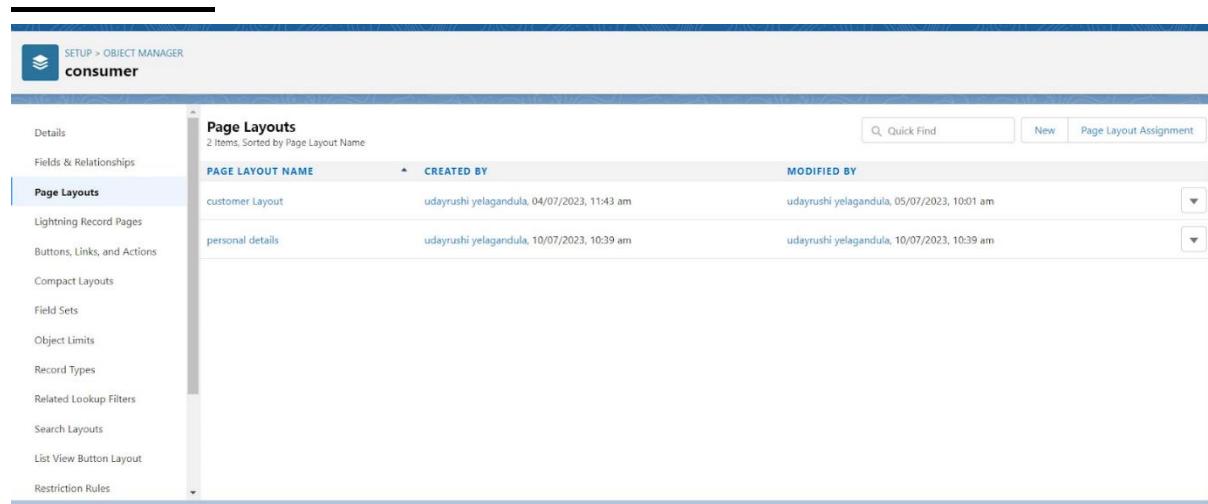
Page layouts:

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.

I.Creating the page layout

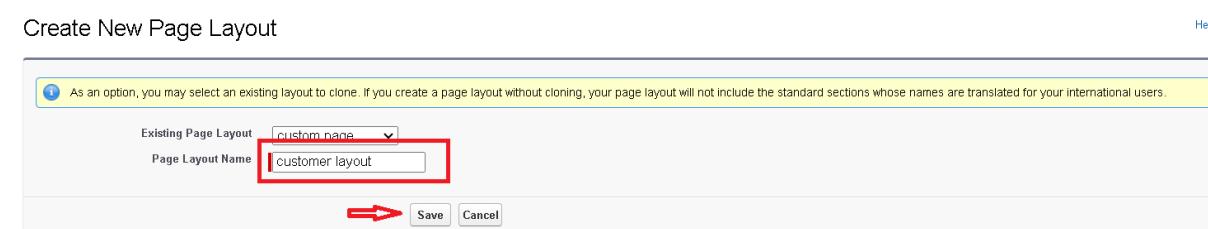
To Create a Page layout:

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



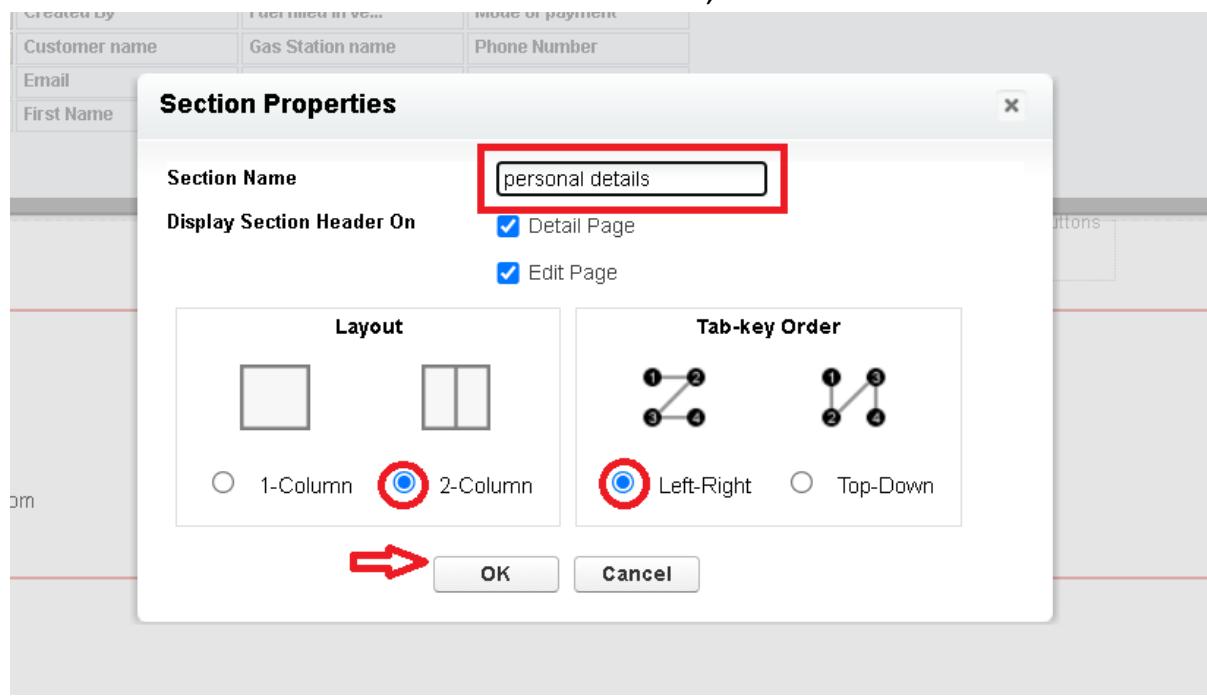
PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
customer Layout	udayrushi yelagandula, 04/07/2023, 11:43 am	udayrushi yelagandula, 05/07/2023, 10:01 am
personal details	udayrushi yelagandula, 10/07/2023, 10:39 am	udayrushi yelagandula, 10/07/2023, 10:39 am

- 3.Select the existing page layout, and give the page layout name as “consumer layout”, and click Save



- 4.Drag and drop the section field to consumer details and create the section.

5. Enter the section name as "Personal details", - click Ok.



7. Now drag the fields to this section that mentioned , they are

- First name , last name , consumer name , phone number, email, rice mill name.

8. Follow the same process for another two sections as shown above , they are

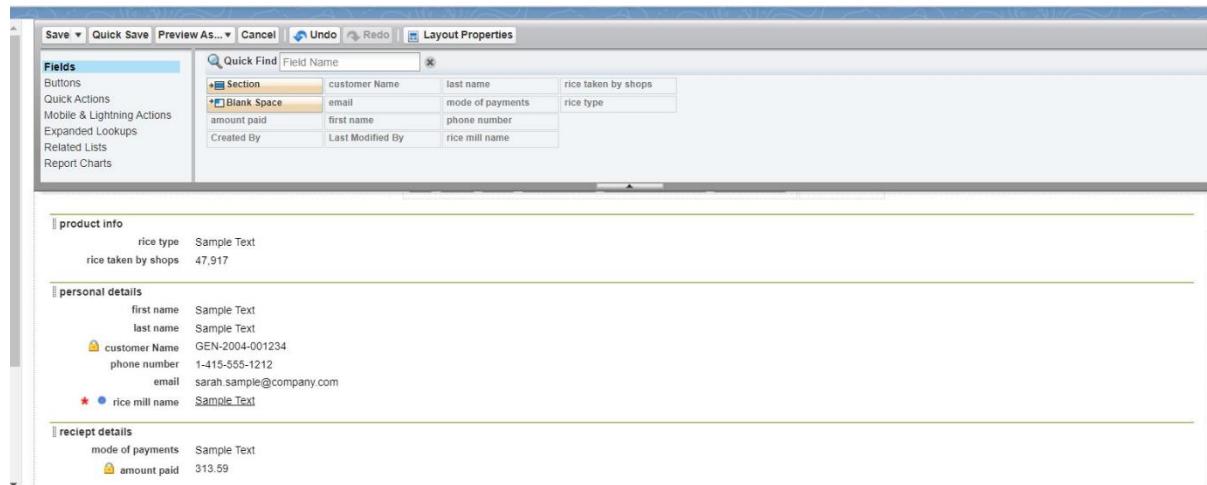
9. One section is " rice details " , drag the fields that are

- Rice taken by shop, rice type.

10. Another section is "Receipt details " , and drag the fields that are

- Mode of payment , Amount paid.

11. Then , Click save.



TASK-7: Creating the Profiles

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.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

We cannot deleted standard ones

Each of these standard ones includes a default set of permissions for all of 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.

I. 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.

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.

Profile Detail

Name	owner	Edit	Clone	Delete	View Users
User License	Salesforce	Custom Profile <input checked="" type="checkbox"/>			
Description					
Created By	udayrushi.yelagandula, 10/07/2023, 10:56 am	Modified By udayrushi.yelagandula , 10/07/2023, 10:56 am			

Page Layouts

Standard Object Layouts	Global	Object Milestone
Global	Global Layout [View Assignment]	Object Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours
Home Page Layout	DE Default [View Assignment]	Opportunity
Account	Account Layout [View Assignment]	Opportunity Product
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Order
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Order Product

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.

Object	Basic Access					Data Administration						
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Asset Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Brokers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
consumers	<input checked="" type="checkbox"/>	<input type="checkbox"/>										
Employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
energy audits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
item details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
nick names	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
positions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
ProjectTasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Properties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					

Object	Basic Access					Data Administration						
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
purchasers	<input type="checkbox"/>											
reviews	<input type="checkbox"/>											
rice details	<input checked="" type="checkbox"/>											
rice mills	<input checked="" type="checkbox"/>											
SolarBots	<input type="checkbox"/>											
SolarBot Status	<input type="checkbox"/>											
studs	<input type="checkbox"/>											
students	<input type="checkbox"/>											
super marts	<input type="checkbox"/>											
suppliers	<input checked="" type="checkbox"/>											
teachers	<input type="checkbox"/>											
tickets	<input type="checkbox"/>											
vendors	<input type="checkbox"/>											

3. Give access and save it.

II. 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.

	Basic Access						Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asset Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brokers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
consumers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>									
Employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
energy audits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
item details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
nick names	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
positions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ProjectTasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Properties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Basic Access						Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
purchasers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
reviews	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
rice details	<input checked="" type="checkbox"/>	<input type="checkbox"/>										
rice mills	<input checked="" type="checkbox"/>	<input type="checkbox"/>										
SolarBots	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SolarBot Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
studs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
super marts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
suppliers	<input checked="" type="checkbox"/>	<input type="checkbox"/>										
teachers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
tickets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
vendors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. And click save.

III. 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.

	Basic Access						Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asset Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brokers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
consumers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>									
Employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
energy audits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
item details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
nick names	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
positions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ProjectTasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Properties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Basic Access						Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
purchasers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
reviews	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
rice details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>									
rice mills	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SolarBots	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SolarBot Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
studs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
super marts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
suppliers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
teachers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
tickets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. And click save.

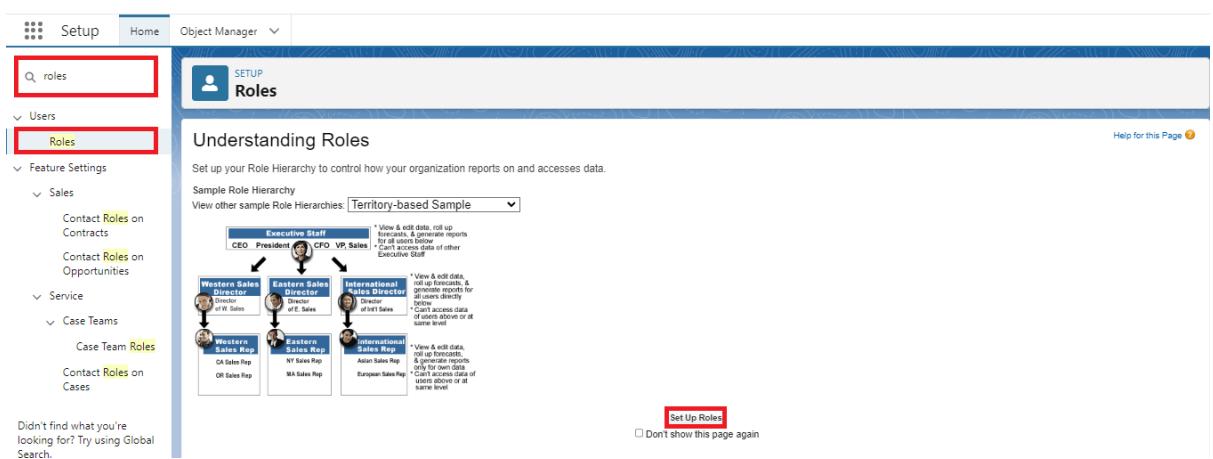
TASK-7: Role & Role Hierarchy

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.

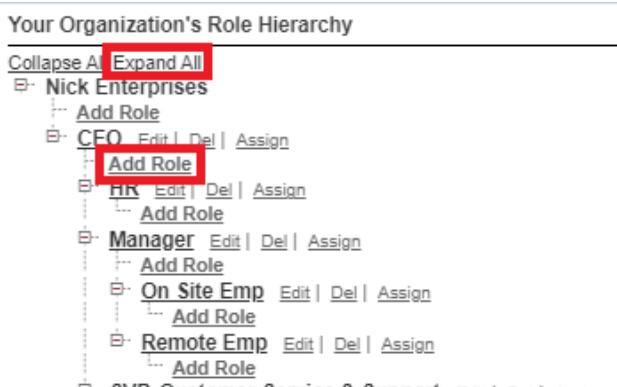
I. Creating owner Role

Creating owner Role:

1. Go to quick find >> Search for Roles >> click on set up roles.
2. Go to quick find >> Search for Roles >> click on set up roles.



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.

II.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.

4. Give Label as “employer” and Role name gets auto populated. Then click on Save.
5. Repeat the same steps, for another role.
6. Click plus on CEO role, and click plus on owner, and click add role under employer.

```

    graph TD
        Manager[Manager] --> OnSiteEmployee[On Site Employee]
        Manager --> RemoteEmployee[Remote Employee]
        Manager --> AddRole1[Add Role]
        owner[owner] --> employer[employer]
        owner --> AddRole2[Add Role]
        SVP[SVP] --> CustomerSupport[Customer Support]
        SVP --> InstallationRepair[Installation & Repair Services]
        SVP --> SVPHumanResources[SVP Human Resources]
        SVP --> SVPSalesMarketing[SVP Sales & Marketing]
        SVP --> VPInternationalSales[VP International Sales]
        SVP --> VPMarketing[VPM Marketing]
    
```

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

TASK-8: Users

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.

I.Create User

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

11.Profiles : owner.

User Edit

General Information

First Name	vicky	Role	owner
Last Name	y	User License	Salesforce
Alias	vy	Profile	owner
Email	ramesh0820@gmail.com	Active	<input checked="" type="checkbox"/>
Username	ramesh0820@754123@gmail	Marketing User	<input type="checkbox"/>
Nickname	vicky	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	None
		Data.com Monthly Addition Limit	300

12.Save it.

II.Creating another users:

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

III.Create Another User:

- 1.Go to setup ? type users in quick find box ? select users ? click New user.
- 2.Fill in the fields
- 3.First Name: ragu
- 4.Last Name: raj
- 5.Alias : Give a Alias Name
- 6.Email id : Give your Personal Email id
- 7.Username : Username should be in this form: text@text.text

- 8.Nick Name : Give a Nickname
- 9.Role : worker
- 10.User license : Salesforce platform
- 11.Profiles : standard platform user.

TASK-9: 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.

I.Creating OWD setting.

1.Go to setup >> type “sharing settings ” in quick search >> Click edit.

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

- 2.Scroll down, change the default internal access to “ public read-only” for rice mill and supplier object.
- 3.Click save.
- 4.Extra information, By these every profile has their own access, according to their profile.
- 5.But in our case we created roles and given the roles in such a way that the owner can see employer and worker records , and the employer can see the worker records.

TASK-10: Creating the Reports

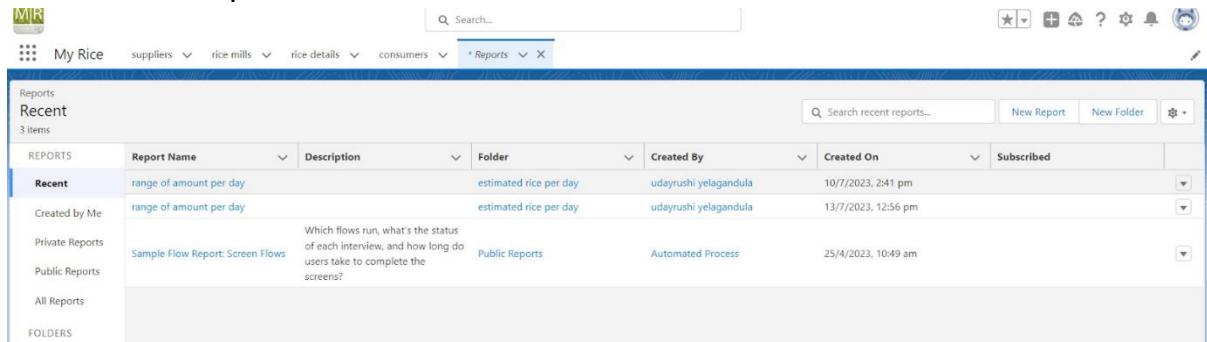
I.Create Report:

Note : Before creating a report, create the latest “10” records in consumer objects.

Try to fill every field in each record for better experience.

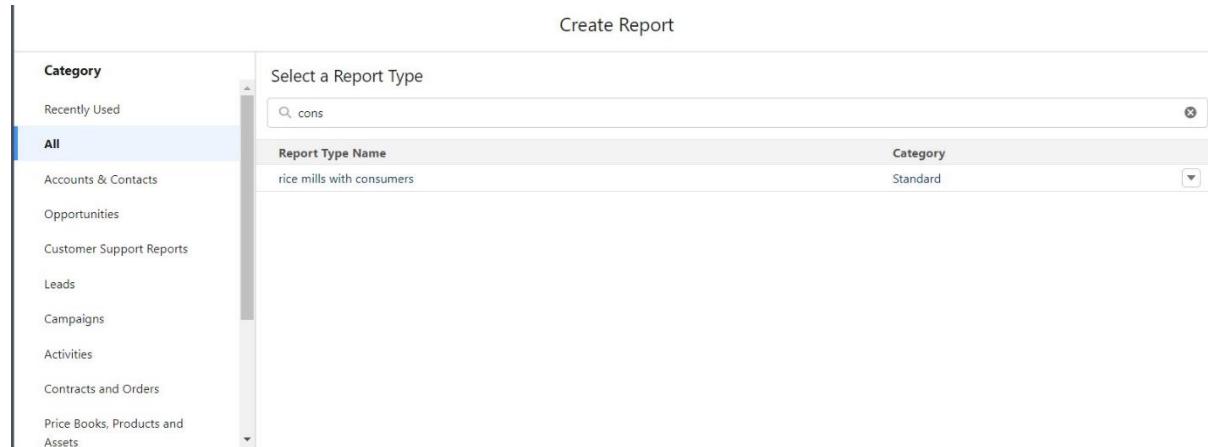
1. Go to the app >>click on the reports tab

2.Click New Report.



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

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



Report Type Name	Category
rice mills with consumers	Standard

1.Their outline pane is opened already, select the fields that are mentioned below in the column section.

- 1.consumer name
- 2.rice type
- 3.rice price/kg
- 4.mode of payments
- 5.amount paid

2.Remove the unnecessary fields.

3.Select the fields that are mentioned below in the GROUP ROWS section.

a. Rice taken by shops

REPORT ▼
New rice mills with consumers Report ▼ rice mills with consumers

Fields ▼ Outline ▼ Filters 1

Groups ▼ GROUP ROWS x Add group... Q
rice taken by shops x

GROUP COLUMNS ▼ Add group... Q

Columns ▼ Add column... Q

consumer: consumer name x
rice type x
rice price/kg x
mode of payments x
amount paid x

rice taken by shops ▼ consumer: consumer name ▼ rice type ▼ rice price/kg ▼ mode of payments ▼ amount paid ▼

8 (1) A-0003 normal rice 50 Cash 400.00
Subtotal 50 400.00
10 (1) A-0006 basmati 50 Cash 500.00
Subtotal 50 500.00
12 (1) A-0007 basmati 50 Cash 600.00
Subtotal 50 600.00
15 (1) A-0008 basmati 50 Cash 750.00
Subtotal 50 750.00
16 (1) A-0010 normal rice 50 Cash 800.00
Subtotal 50 800.00
18 (1) A-0009 normal rice 50 Cash 900.00
Subtotal 50 900.00
80 (1) A-0011 basmati 50 Net banking 4,000.00
Subtotal 50 4,000.00
Total (11) 50 9,050.00

Row Counts ▼ Detail Rows ▼ Subtotals ▼ Grand Total ▼

Update Preview Automatically

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

Report: rice mills with consumers
range of amount per day

Total Records 11 Total rice price/kg 50 Total amount paid 9,050.00

rice taken by shops ▼ consumer: consumer name ▼ rice type ▼ rice price/kg ▼ mode of payments ▼ amount paid ▼

5 (2) A-0001 basmati 50 Net banking 250.00
A-0005 normal rice 50 Cash 250.00
Subtotal 50 500.00
6 (2) A-0002 normal rice 50 Cash 300.00
A-0004 basmati 50 Cash 300.00
Subtotal 50 600.00
8 (1) A-0003 normal rice 50 Cash 400.00
Subtotal 50 400.00
10 (1) A-0006 basmati 50 Cash 500.00
Subtotal 50 500.00
12 (1) A-0007 basmati 50 Cash 600.00
Subtotal 50 600.00
15 (1) A-0008 basmati 50 Cash 750.00
Subtotal 50 750.00

Row Counts ▼ Detail Rows ▼ Subtotals ▼ Grand Total ▼

II.Sharing report to owner:

1.Click edit drop down and select subscribe option

Report: rice mills with consumers
range of amount per day

rice taken by shops ▼ consumer: consumer name ▼ rice type ▼ rice price/kg ▼ mode of payments ▼ amount paid ▼

8 (1) A-0003 normal rice 50 Cash 400.00
Subtotal 50 400.00
10 (1) A-0006 basmati 50 Cash 500.00
Subtotal 50 500.00
12 (1) A-0007 basmati 50 Cash 600.00
Subtotal 50 600.00
15 (1) A-0008 basmati 50 Cash 750.00
Subtotal 50 750.00
16 (1) A-0010 normal rice 50 Cash 800.00
Subtotal 50 800.00
18 (1) A-0009 normal rice 50 Cash 900.00
Subtotal 50 900.00
80 (1) A-0011 basmati 50 Net banking 4,000.00
Subtotal 50 4,000.00
Total (11) 50 9,050.00

Enable Field Editing ▼ Add Chart ▼ Edit ▼

Save As ▼
Save ▼
Subscribe ▼ (highlighted with a blue arrow)
Export ▼
Delete ▼
Add to Dashboard ▼

2. Follow as per below image.

Edit Subscription

Settings

Frequency

Daily Weekly Monthly

Time

8:00 am

Attachment

Attach File

Recipients

Send email to

Me

Edit Recipients

Run Report As

Me Another Person

Cancel Save

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

4. Click save.

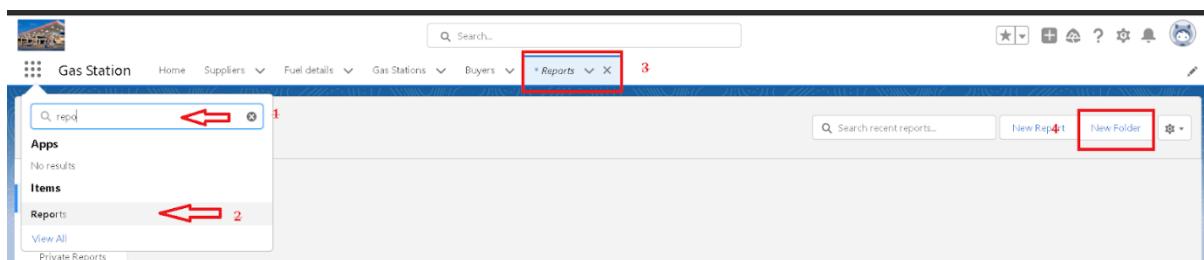
NOTE: The owner gets daily email notification of that rice mill report so that he can see all data remotely.

III. Create a report folder

1. Click on the app launcher and search for reports.

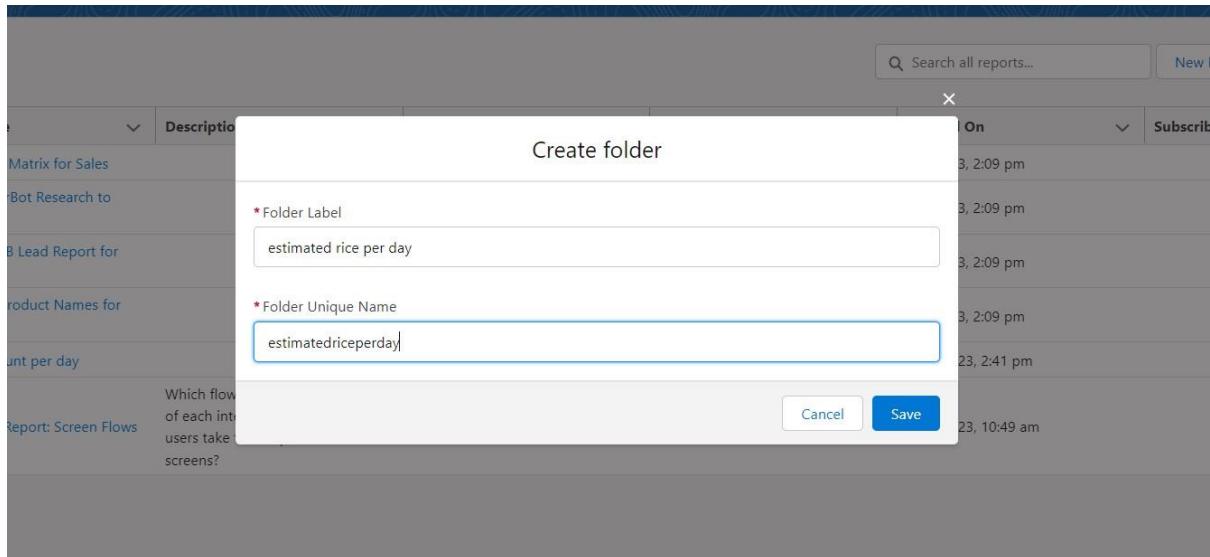
2. Double click on the report, “reports tab” will be auto populated in the navigation bar.

3. Click on the report tab, click on the new folder.

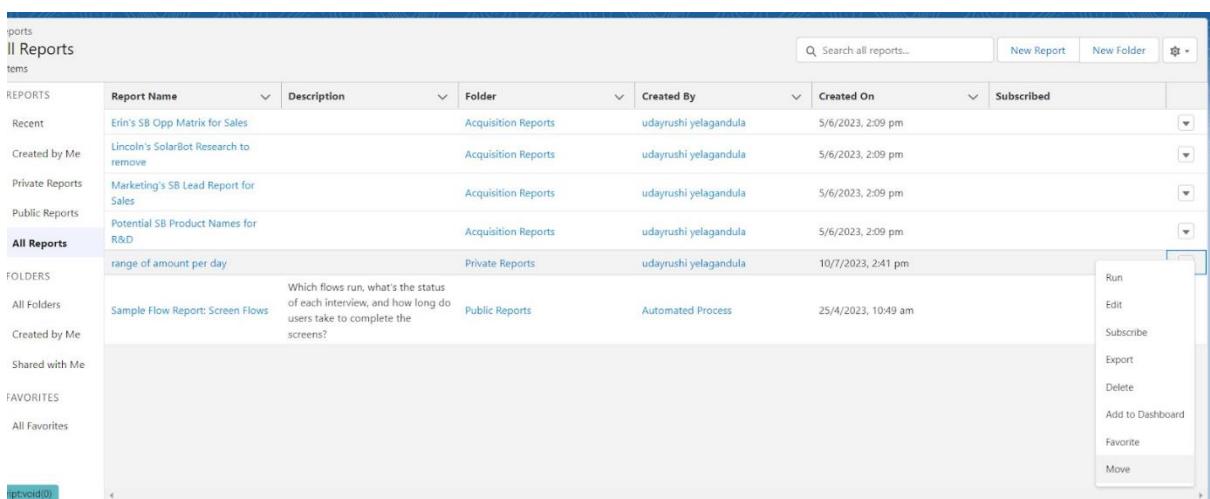


4. Give the Folder label as “estimated rice per day”, Folder unique name will be auto populated.

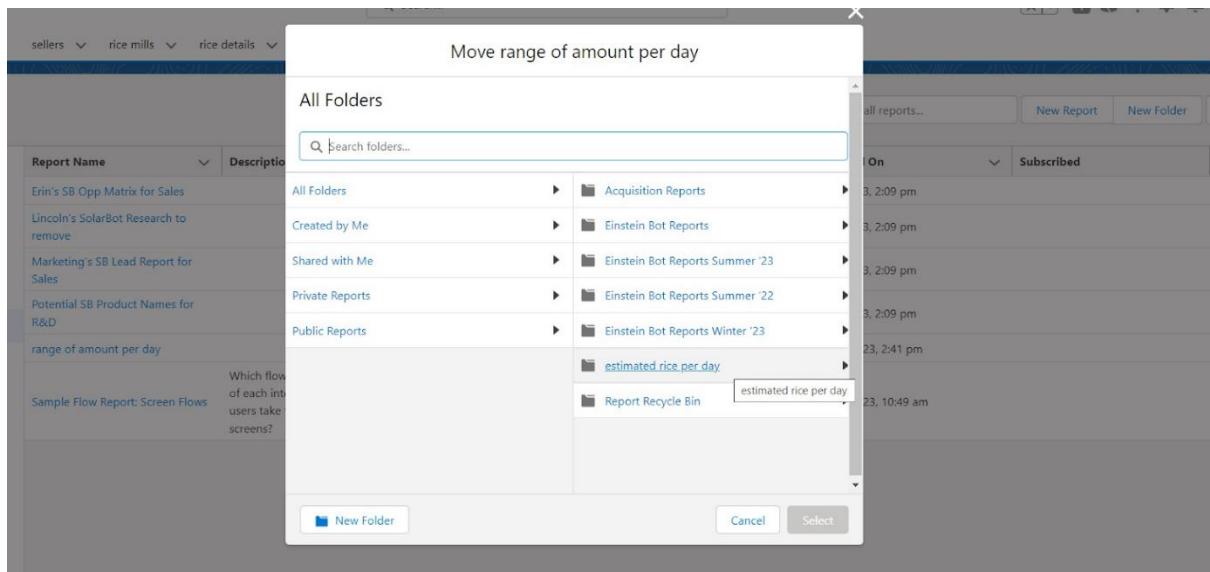
5.Click save.



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



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



Note: if you want to see the report which you have created then go to reports - all folders - estimated rice per day - your report will appear in this way.

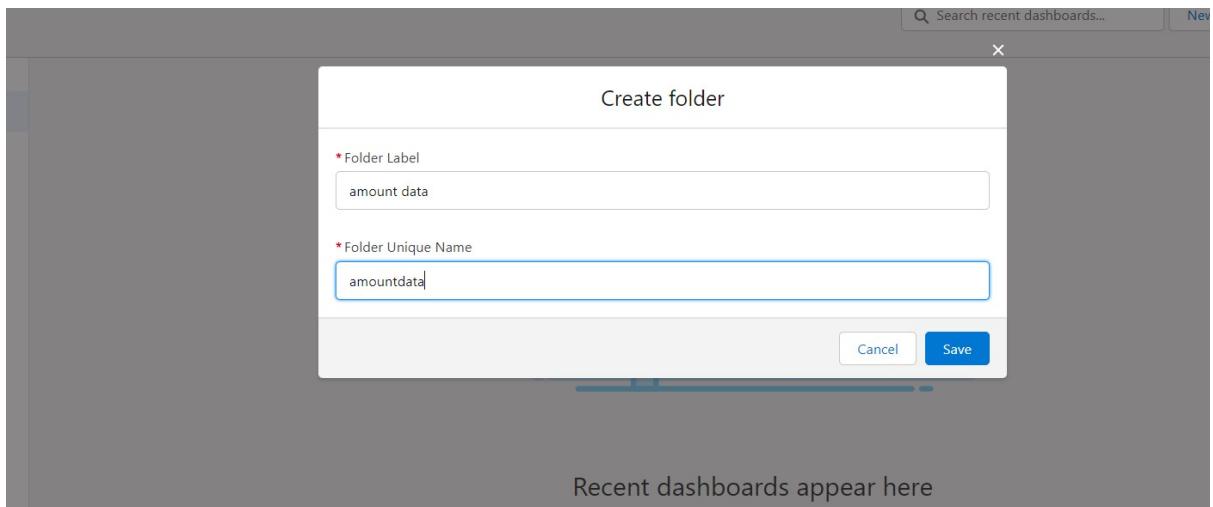
TASK-11: Creating the Dashboards

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.

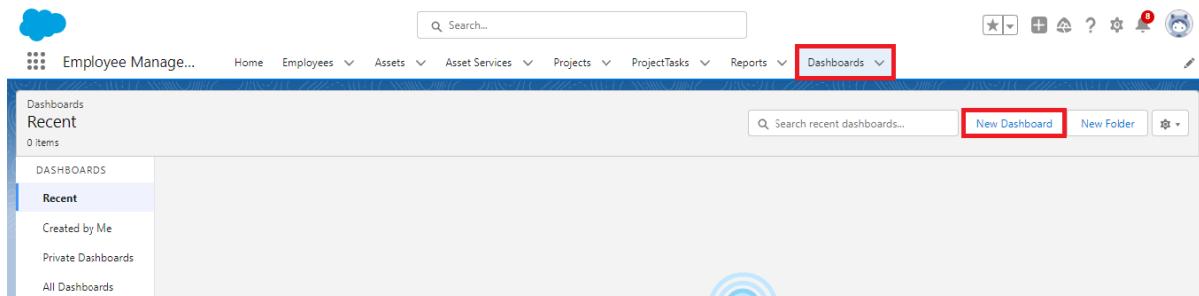
I.Create Dashboard Folder

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.

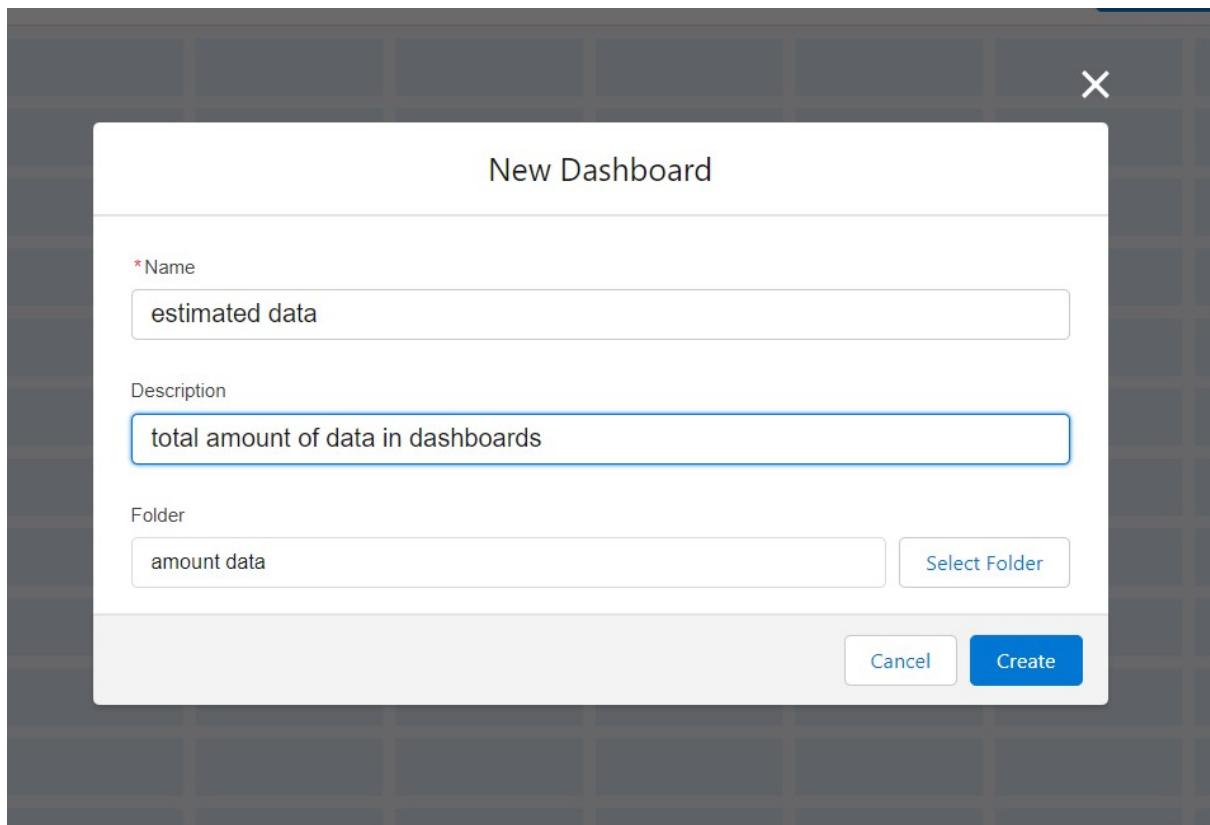


Create Dashboard

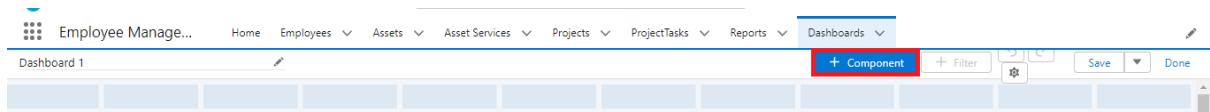
1. Go to the app >> click on the Dashboards tabs.



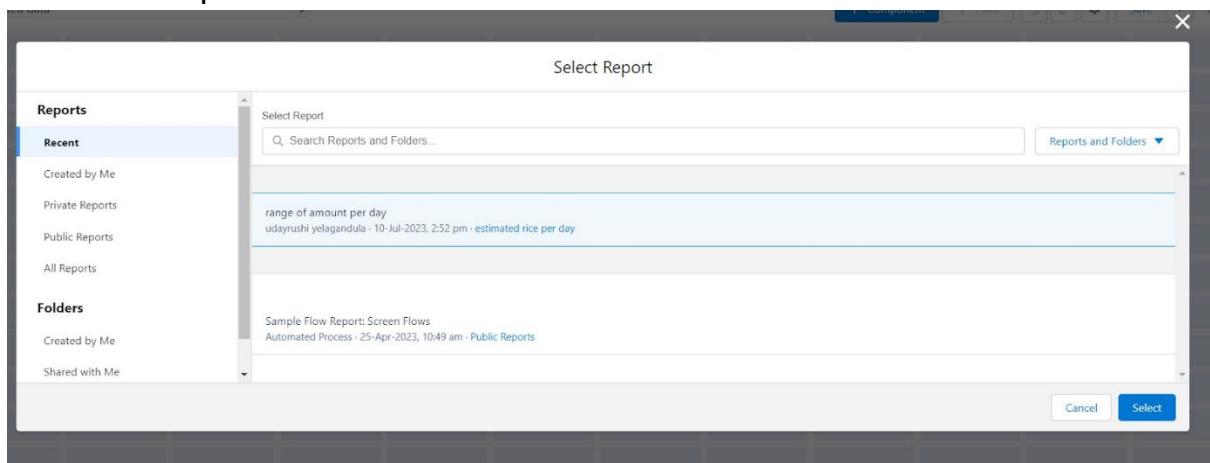
2. Give a Name and select the folder that was created, and click on create.



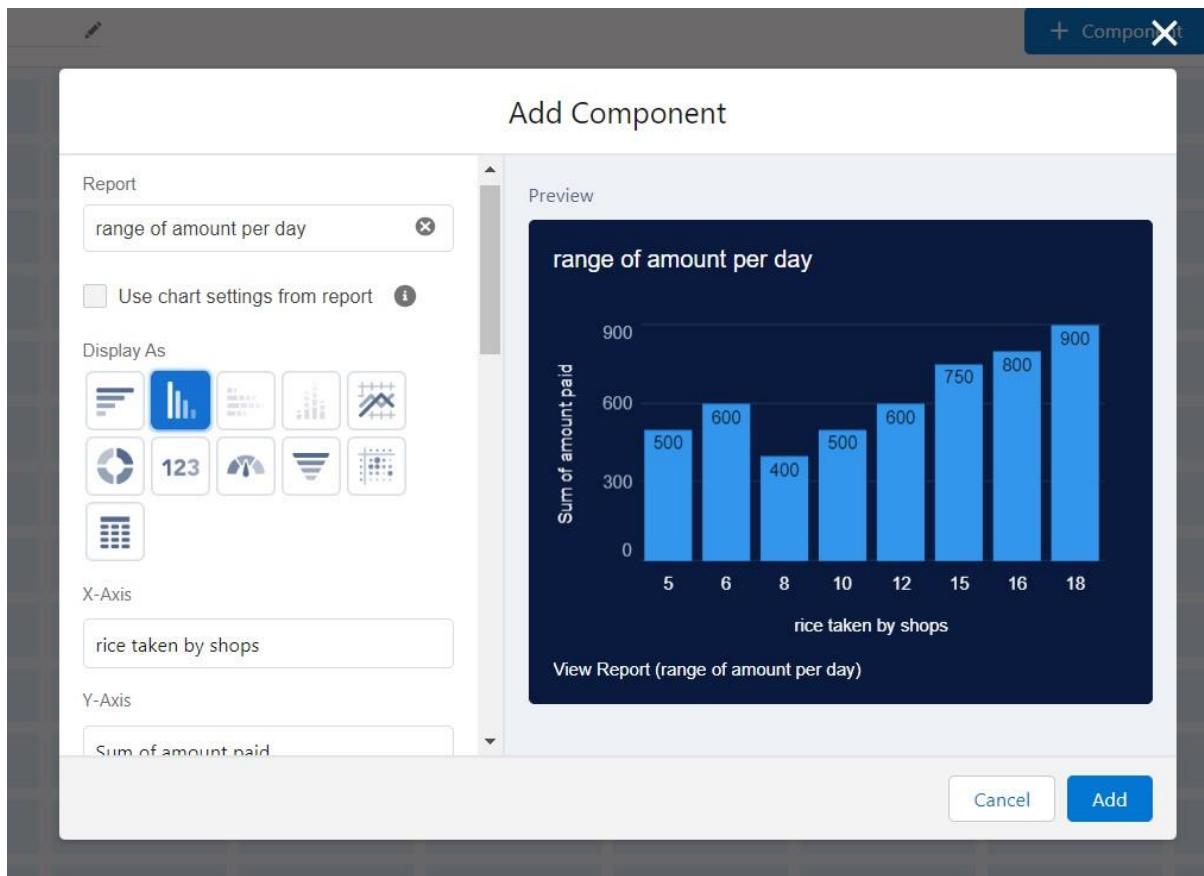
1. Select add component.



2. Select a Report and click on select.



3. Preview is shown below.



Display as>> vertical bar chart

X-axis >> rice taken by shops

Y-axis >> sum of amount

Y-axis range >> automatic

Sort by >> rice taken by shops

Component theme >> dark.

Add the component

Again select add component with above same steps

1.display as donut chart

2.sort by >> sum of amount

3.title>>range of amount per day

4.component theme dark

Value

Sum of amount paid

Sliced By

rice taken by shops

Display Units

Shortened Number

Show Values

Show Percentages

Combine Small Groups into "Others"

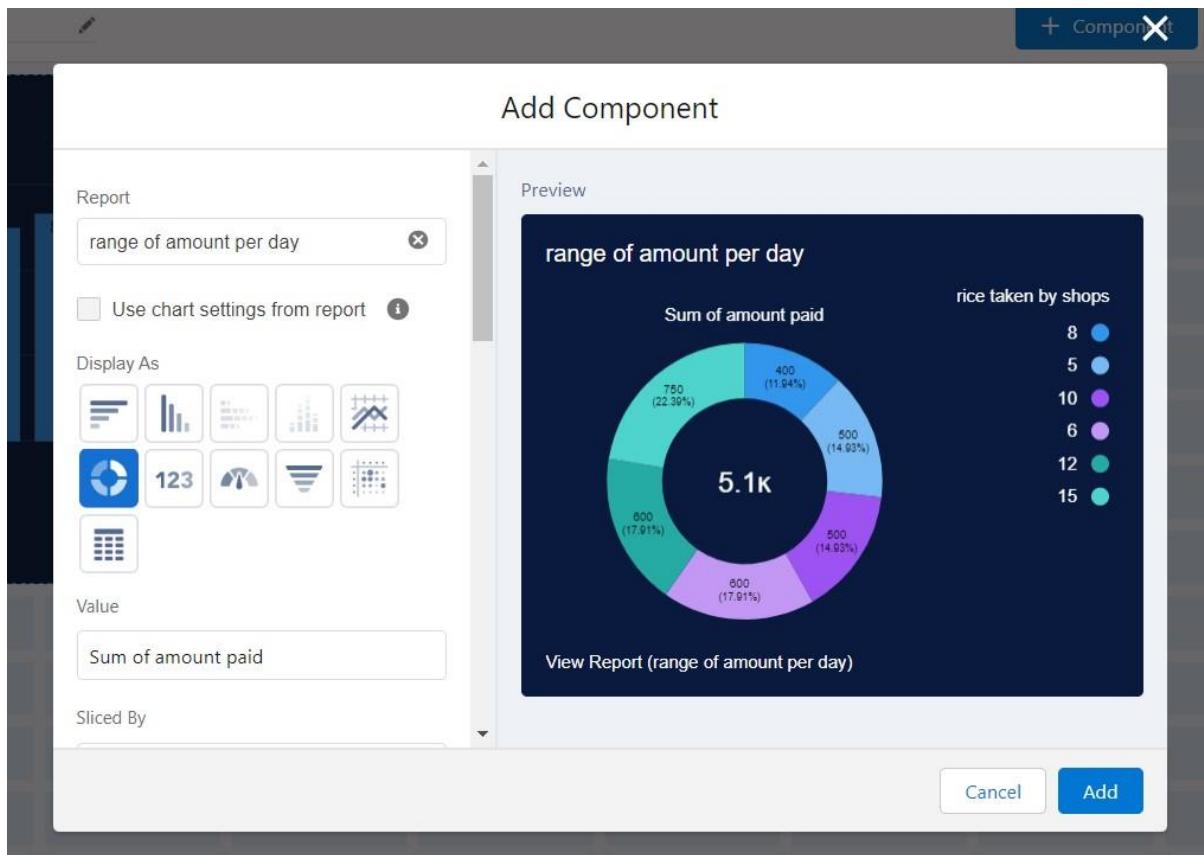
Show Total

Decimal Places

Automatic

Click add.

Click save and done.



TASK-12: APEX

Apex is a strongly typed, object-oriented programming language that allows developers to execute flow and transaction control statements on the Lightning platform server in conjunction with calls to the Lightning Platform API. Using syntax that looks like Java and acts like database stored procedures, Apex enables developers to add business logic to most system events, including button clicks, related record updates, and Visualforce pages. Apex code can be initiated by Web service requests and from triggers on objects.

It is as similar as java i.e, it also supports OOP(Object oriented programming) like Classes, objects, methods.

Creating Classes :

Apex classes are modeled on their counterparts in Java. You'll define, instantiate, and extend classes, and you'll work with interfaces, Apex class versions, properties, and other related class concepts.

- **Class:**

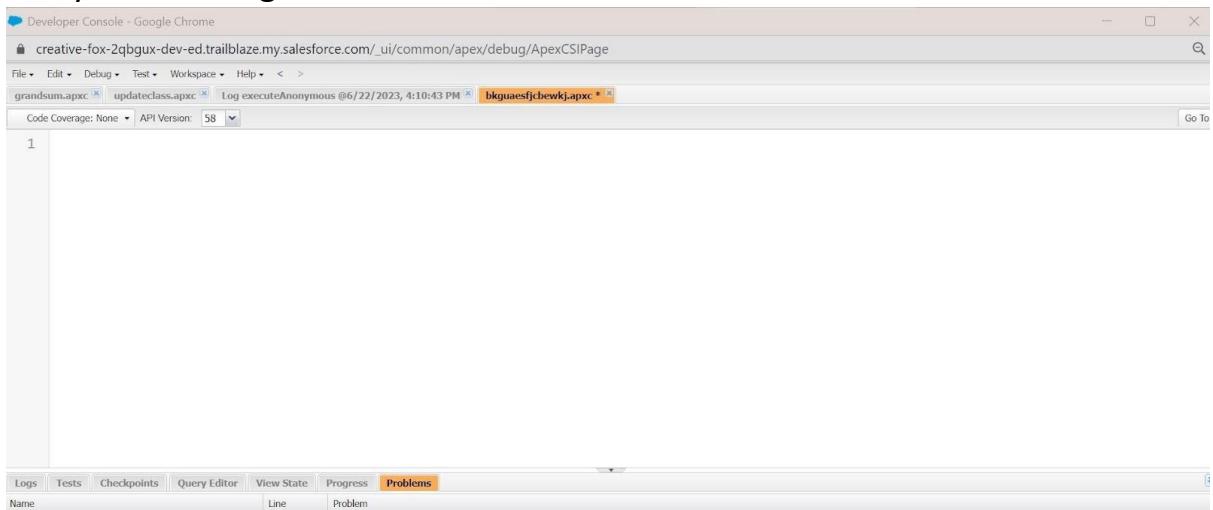
As in Java, you can create classes in Apex. A class is a template or blueprint from which objects are created. An object is an instance of class.

- **Object**

Object is an instance of a class, where it can access all the properties that are present in a class i.e, variables and methods.

I.Creating an Apex Class(ConsumerRecord)

1. Login to the Salesforce account and navigate to the gear account in the top right corner.
2. Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.



-
3. Then you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Class.
 4. Enter the name of the class(ConsumerRecord) to create a new class file.

Code Snippet :

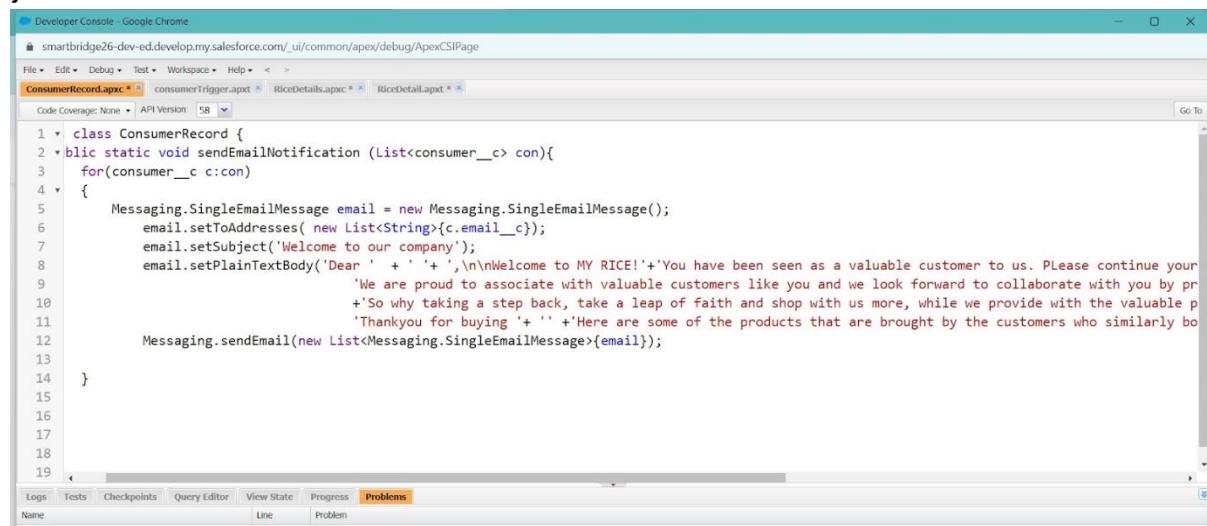
```
class ConsumerRecord {  
    public static void sendEmailNotification (List<consumer__c> con){  
        for(consumer__c c:con)  
        {  
            Messaging.SingleEmailMessage email = new  
            Messaging.SingleEmailMessage();  
            email.setToAddresses( new List<String>{c.email__c});  
            email.setSubject('Welcome to our company');  
            email.setPlainTextBody('Dear ' + ' + ',\n\nWelcome to MY RICE!+'You  
have been seen as a valuable customer to us. Please continue your journey  
with us, while we try to provide you with good quality resources.'+'\n'+
```

"We are proud to associate with valuable customers like you and we look forward to collaborating with you by providing more and more exciting discounts or even product offers too.' + '\n'

+ 'So why taking a step back, take a leap of faith and shop with us more, while we provide with the valuable products and offers' + '\n' + '\n' + '\n' +

'Thankyou for buying ' + '' + 'Here are some of the products that are brought by the customers who similarly bought products like this' + '\n' +');

```
        Messaging.sendEmail(new
List<Messaging.SingleEmailMessage>{email});
    }
}
}
```



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

II.Creating an Apex Trigger

How to create a new trigger :

While still in the trailhead account, navigate to the gear icon in the top right corner.

Click on developer console and you will be navigated to a new console window. Click on the File menu in the toolbar, and click on new? Trigger.

Enter the trigger name and the object to be triggered.

Syntax For creating trigger :

The syntax for creating trigger is :

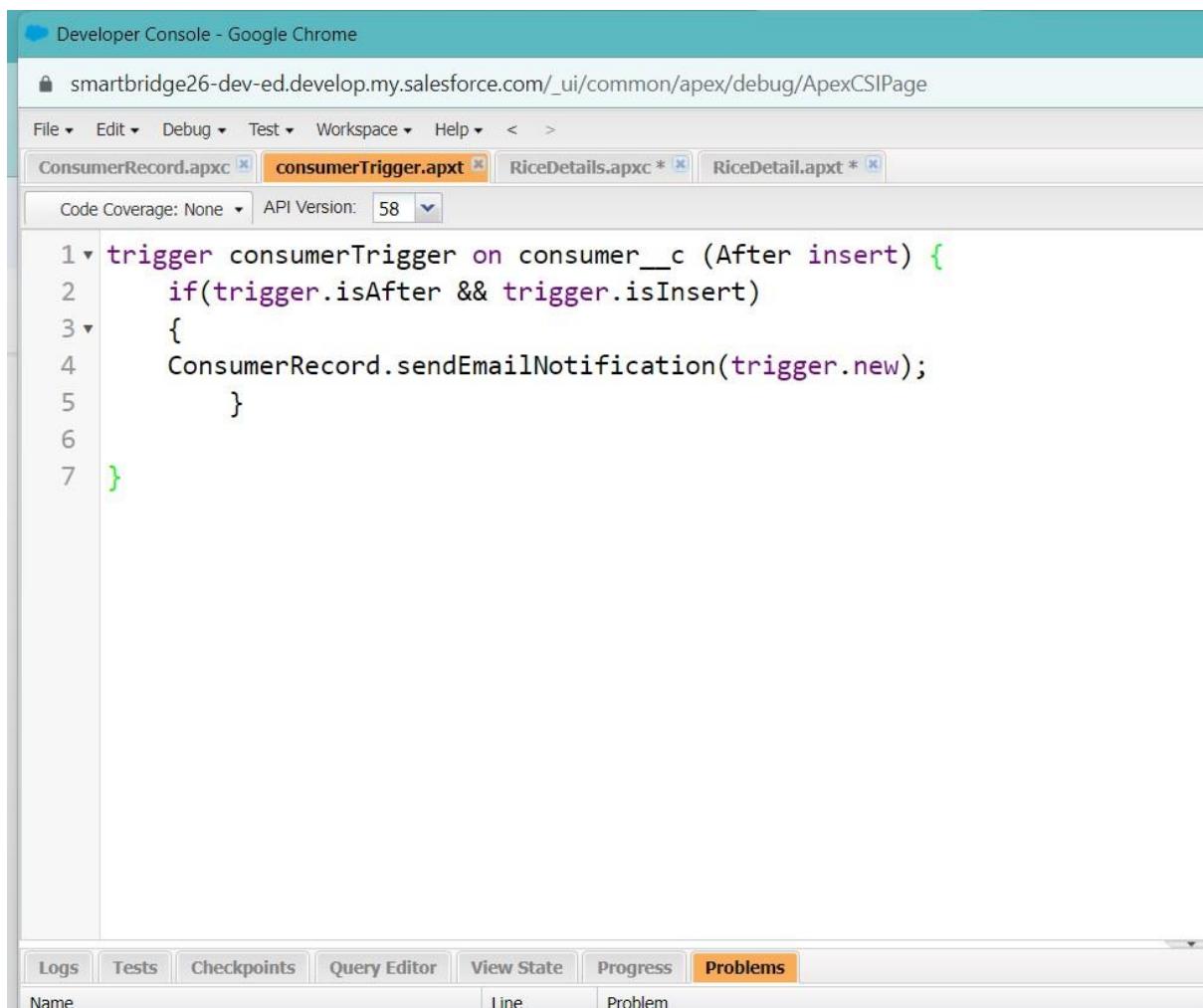
Trigger [trigger name] on [object name](Before/After event) {

//Trigger Logic

}Trigger code:

```
trigger consumerTrigger on consumer__c  
(After insert) {
```

```
    if(trigger.isAfter && trigger.isInsert) {  
        ConsumerRecord.sendEmailNotification(trigger.new);  
    }  
}
```



The screenshot shows the Salesforce Developer Console in Google Chrome. The URL is `smartbridge26-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage`. The tab bar shows `ConsumerRecord.apxc`, **consumerTrigger.apxt** (highlighted in orange), `RiceDetails.apxc *`, and `RiceDetail.apxt *`. The code editor displays the trigger code. The 'Problems' tab in the bottom navigation bar is highlighted in orange, indicating no errors are present.

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

THANK YOU

