

CRM APPLICATION FOR WHOLESALE RICE MILL

Overview

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

- Daily Sales and Production Reports: Generates detailed reports on how much rice is produced & sold each day.
- Revenue Reports: Provides insights into daily revenue generated.
- Customer Analytics: Tracks popular rice types and most frequent buyers.
- Resource Allocation: Helps owners understand data for better resource allocation and future planning.

Rollup Summary Field

- Purpose: Summarizes data from a child object to a parent object that shares a master-detail relationship.
- Functions: Can use COUNT, SUM, MIN, and MAX functions.

Cross-Object Formula Field

- Purpose: References fields from another object in Salesforce.

- Function: Calculates the total amount payable by multiplying the number of rice units taken by the price per kg.

Validation Rules

- Purpose: Ensures data integrity by validating user inputs.
- Is Blank Formula: Verifies if a field is blank and displays an error message if the rule returns a value of "True".

Permission Sets

- Organization Wide Defaults (OWD): Defines the baseline level of access for the most restricted user.
- Roles and Access:
 - Owner: Can view records of employers and workers.
 - Employer: Can view records of workers.

Milestone 1 - Salesforce

Introduction

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?".

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with

employees and partners, and store your data securely in the cloud.

Activity 1: Creating a Developer Account

To start using Salesforce, the first step is to create a developer org. Follow the steps below to create your Salesforce Developer Account:

Go to the Signup Page

- Navigate to the Salesforce Developer Signup page: [Salesforce Developer Signup](#)

Fill Out the Signup Form

- First Name : Velisella
- Last Name : Sravanthi
- Email : sravanhivelisella@gmail.com
- Role : Developer
- Company : LAKIREDDY BALIREDDY COLLEGE OF ENGINEERING
- Country : India
- Postal Code : 521185
- Username : v_sravanthi@company.com

Submit the Form

- After filling in the details, click on the "Sign me up" button. You have successfully created a Salesforce Developer Account. You will receive a confirmation email with further instructions to complete the setup.

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

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

| | |
|-------------|------------|
| First Name* | Last Name* |
| Velisella | Sravanthi |

| |
|------------------------------|
| Email* |
| sravanthivelisella@gmail.com |

| |
|-----------|
| Role* |
| Developer |

| |
|---|
| Company* |
| LAKIREDDY BALI REDDY COLLEGE OF ENGINEERING |

Country/Region*

India

State/Province*

Andhra Pradesh

Postal Code*

521185

Username*

v_sravanthi@company.com

Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)

I agree to the [Main Services Agreement – Developer Services](#) and [Salesforce Program Agreement](#).

Yes, I would like to receive marketing communications regarding Salesforce products, services, and events. I can unsubscribe at any time.

By registering, you confirm that you agree to the processing of your personal data by Salesforce as described in the [Privacy Statement](#).

Sign me Up

Already have a Salesforce Developer Environment?
Log in

Activity 2: Account Activation

After creating your Salesforce Developer Account, you need to activate it. Follow these steps to activate your account:

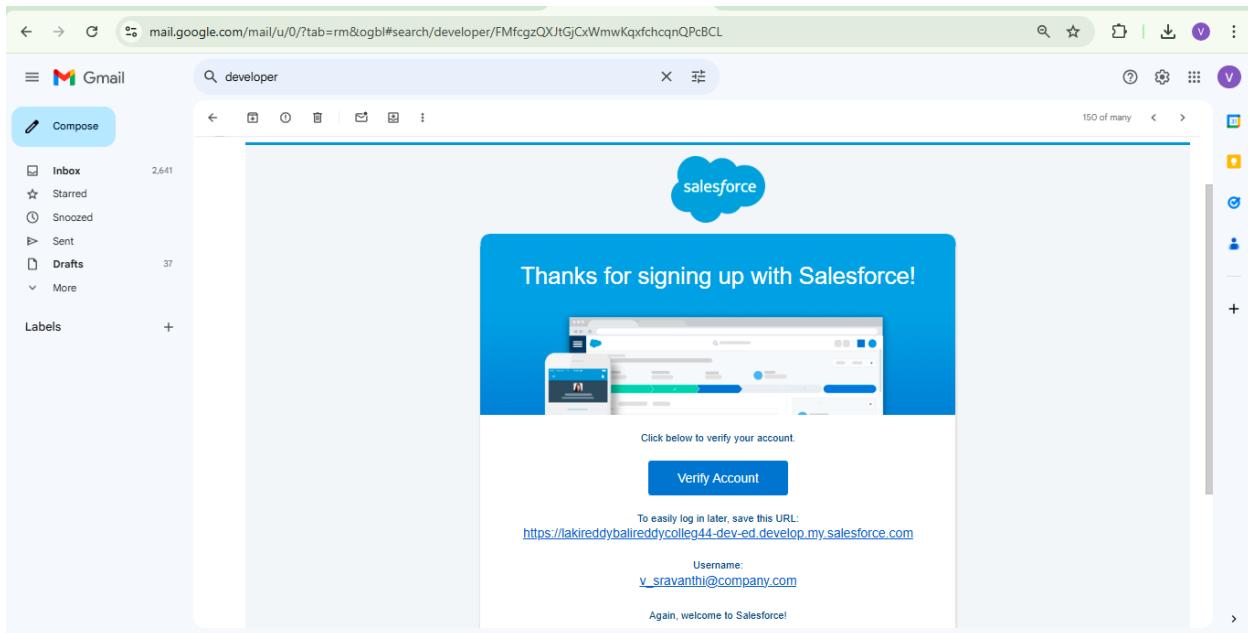
Check Your Email

- Go to the inbox of the email address you used while signing up. The verification

email may take 5-10 minutes to arrive.

Verify Your Account

- Open the email from Salesforce and click on the "Verify Account" link.
- On the verification page, create a password for your account.
- Answer a security question for account recovery.
- Click on "Change Password".



Milestone 2 - Object

What Is an Object?

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

Types of Salesforce Objects

Salesforce objects are of two types:

- Standard Objects: Standard objects are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

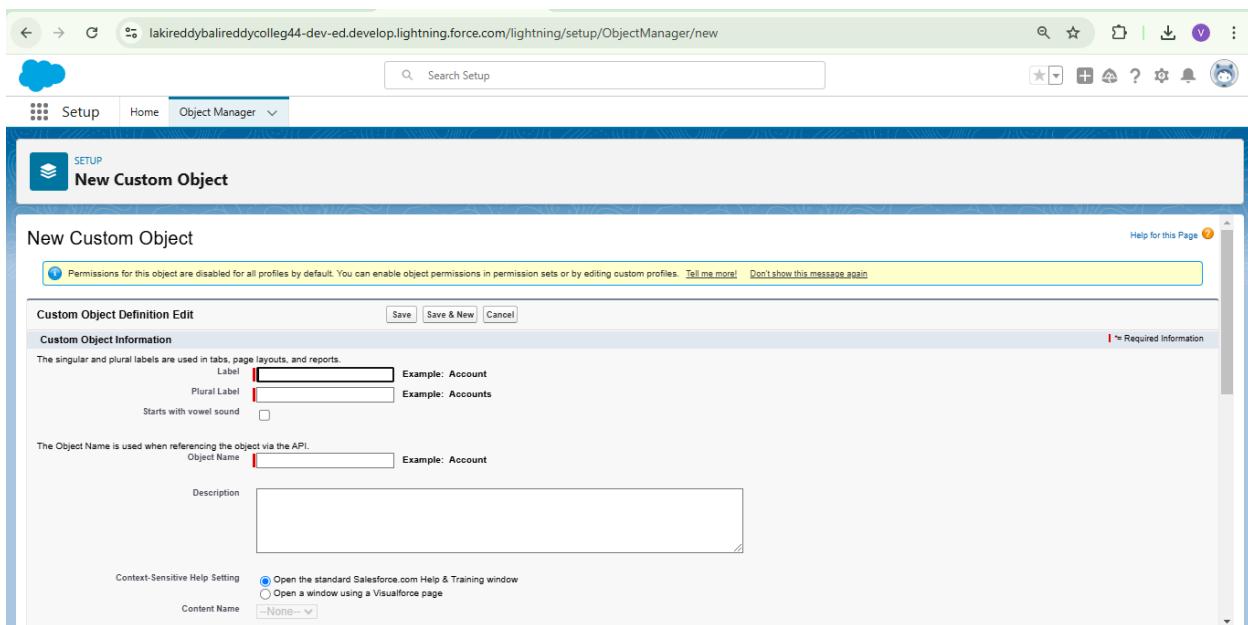
- Custom Objects: Custom objects are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

To Navigate to Setup Page:

- Click on the gear icon
- Click on Setup

To Create an Object:

- From the setup page, click on Object Manager
- Click on Create
- Click on Custom Object
- On the Custom Object defining page:
- Enter the Label Name and Plural Label Name
- Click on Allow Reports
- Click on Allow Search
- Click on Save



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

- Page Title:** New Custom Object
- Section:** Custom Object Definition Edit
- Buttons:** Save, Save & New, Cancel
- Custom Object Information:**
 - Label: Account
 - Plural Label: Accounts
 - Starts with vowel sound:
- Object Name:** Account
- Description:** (Empty text area)
- Context-Sensitive Help Setting:**
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
- Content Name:** None

Activity 1: Create Supplier Object

To create a Supplier object in Salesforce, follow these steps:

Navigate to Setup Page:

- Click on the gear icon.
- Click on Setup.

Create a Custom Object:

- From the setup page, click on Object Manager.
- Click on Create.
- Click on Custom Object.

Define the Custom Object:

- Enter the Label Name : Supplier.
- Enter the Plural Label Name : Suppliers.
- Enter the Record Name Label and Format:
- Record Name: Supplier Name
- Data Type: Text

Set Additional Options:

- Click on Allow Reports.
- Click on Track Field History.
- Click on Allow Search.

Save the Custom Object:

- Click on Save.+

lakireddybalireddycolleg44-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IdL000003jYWr/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
supplier

Details

Description

API Name supplier_c
Custom ✓
Singular Label supplier
Plural Label suppliers

Enable Reports ✓
Track Activities
Track Field History ✓
Deployment Status Deployed
Help Settings Standard salesforce.com Help Window

Edit Delete

This screenshot shows the 'supplier' object's details in the Salesforce Object Manager. The left sidebar lists tabs for Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Restriction Rules. The main pane displays the 'Details' tab, which includes fields for Description, API Name (supplier_c), Custom status (✓), Singular Label (supplier), and Plural Label (suppliers). On the right, there are sections for Enable Reports (✓), Track Activities, Track Field History (✓), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Action buttons for Edit and Delete are at the top right.

lakireddybalireddycolleg44-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IdL000003jYWr/edit?address=%2F01IdL000003jYWr%2Fe%

Setup Home Object Manager

SETUP > OBJECT MANAGER
supplier

Details

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Example: Account
Plural Label Example: Accounts
Starts with vowel sound

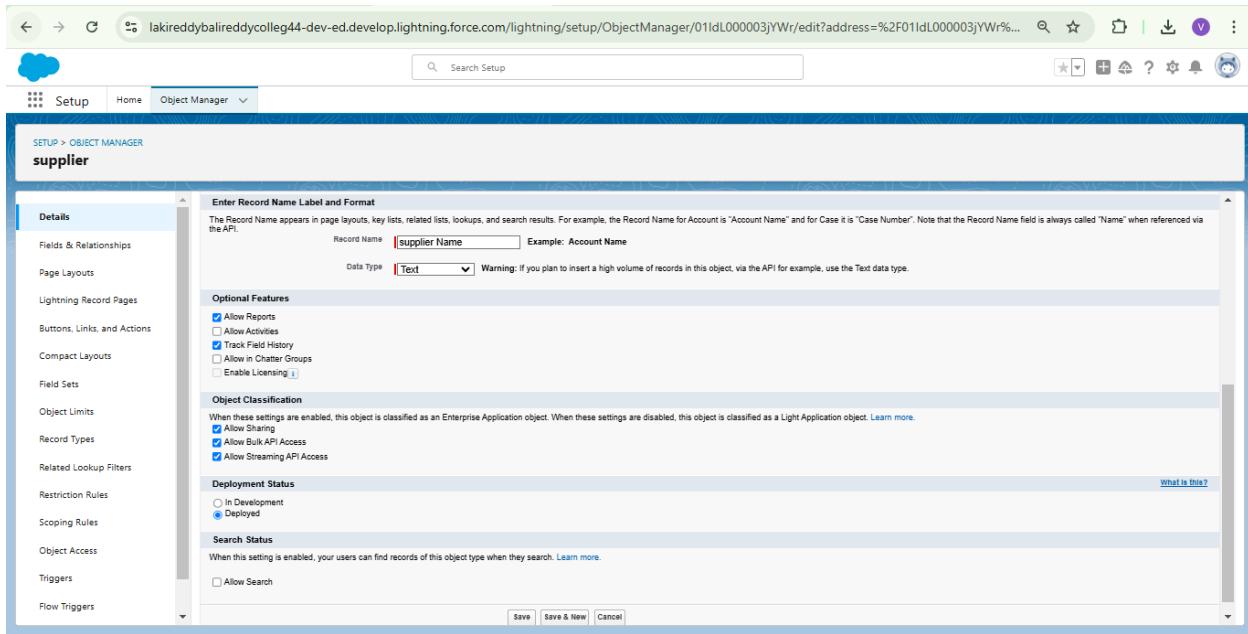
The Object Name is used when referencing the object via the API.
Object Name Example: Account

Description

Context-Sensitive Help Setting Open the standard Salesforce.com Help & Training window
 Open a window using a Visualforce page

Content Name

This screenshot shows the 'Custom Object Definition Edit' page for the 'supplier' object. The left sidebar is identical to the previous screenshot. The main pane is titled 'Custom Object Definition Edit' with buttons for Save, Save & New, and Cancel. It contains a 'Custom Object Information' section with a note about changing names. It has fields for 'Label' (supplier) and 'Plural Label' (suppliers), both with examples. There is a checkbox for 'Starts with vowel sound'. Below that is a note about the 'Object Name' being used for APIs, with a field showing 'supplier' and an example of 'Account'. A large text input field for 'Description' is present. At the bottom, there are 'Context-Sensitive Help Setting' options (radio buttons for standard help or Visualforce page) and a 'Content Name' dropdown set to 'None'.



Activity 2:Create Rice Mill Object

To create a Rice Mill object in Salesforce, follow these steps:

Navigate to Setup Page:

- Click on the gear icon.
- Click on Setup.

Create a Custom Object:

- From the setup page, click on **Object Manager**.
- Click on **Create**.
- Click on **Custom Object**

Define the Custom Object :

- Enter the Label Name: Rice Mill.
- Enter the Plural Label Name: Rice Mills.
- Enter the Record Name Label and Format:
- Record Name: Leave it blank.
- Data Type: Auto Number

- Display Format: rice-{000}
- Starting Number: 1

Set Additional Options:

- Click on Allow Reports.
- Click on Track Field History.
- Click on Allow Search.

Save the Custom Object:

- Click on **Save**.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager, along with a search bar and various system icons. The main content area displays the details for the 'rice mill' object. On the left, a sidebar lists various configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Restriction Rules. The right side of the screen shows the 'Details' section for the 'rice mill' object. It contains fields for Description, API Name (set to 'rice_mill_c'), Singular Label ('rice mill'), and Plural Label ('rice mills'). Under the 'Details' section, there are several checkboxes for additional options: 'Enable Reports' (checked), 'Track Activities', 'Track Field History' (checked), 'Deployment Status' (set to 'Deployed'), and 'Help Settings' (set to 'Standard salesforce.com Help Window'). At the bottom right of the details section are 'Edit' and 'Delete' buttons.

The image displays two screenshots of the Salesforce Setup page under 'Object Manager'. Both screenshots show the configuration of a custom object named 'rice mill'.

Screenshot 1: Custom Object Definition Edit

- Custom Object Information:**
 - Label: rice mill (Example: Account)
 - Plural Label: rice mills (Example: Accounts)
 - Starts with vowel sound:
 - The Object Name is used when referencing the object via the API. Object Name: rice_mill (Example: Account)
 - Description: (Empty text area)
 - Context-Sensitive Help Setting:
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
 - Content Name: None
- Enter Record Name Label and Format:**
 - The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
 - Record Name: rice mill Name (Example: Account Name)
 - Data Type: Auto Number (Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.)
 - Display Format: rice-{000} (Example: A-{000})

Activity 3: Create Consumer Object

To create a Consumer object in Salesforce, follow the same steps as mentioned in Activity 2 for creating the Rice Mill object. Use the following details for the Consumer object:

Navigate to Setup Page:

- Click on the gear icon.
- Click on Setup.

Create a Custom Object:

- From the setup page, click on Object Manager.
- Click on Create.
- Click on Custom Object.

Define the Custom Object :

- Enter the Label Name: Rice Details.
- Enter the Plural Label Name: Rice Details.
- Enter the Record Name Label and Format:
- Record Name: Leave it blank.
- Data Type: Auto Number
- Display Format: rice-{000}.
- Starting Number: 1

Set Additional Options:

- Click on Allow Reports.
- Click on Track Field History.
- Click on Allow Search.

Save the Custom Object: Click on Save.

lakireddybalireddycolleg44-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000003jYgX/Details/view

The screenshot shows the 'Details' tab of the Object Manager for the 'consumer' object. The left sidebar lists various configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Restriction Rules. The main pane displays the following details:

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

Buttons at the top right: Edit and Delete.

lakireddybalireddycolleg44-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000003jYgX/edit?address=%2F01IdL000003jYgX%2Fe%3...

The screenshot shows the 'Edit Custom Object CONSUMER' page. The left sidebar lists configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, Triggers, and Flow Triggers. The main pane displays the 'Custom Object Definition Edit' form:

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

| | | |
|--------------|-----------|-------------------|
| Label | consumer | Example: Account |
| Plural Label | consumers | Example: Accounts |

The Object Name is used when referencing the object via the API.

| | | |
|-------------|----------|------------------|
| Object Name | consumer | Example: Account |
|-------------|----------|------------------|

Description: [Empty text area]

Context-sensitive Help Setting: Open the standard Salesforce.com Help & Training window Open a window using a Visualforce page

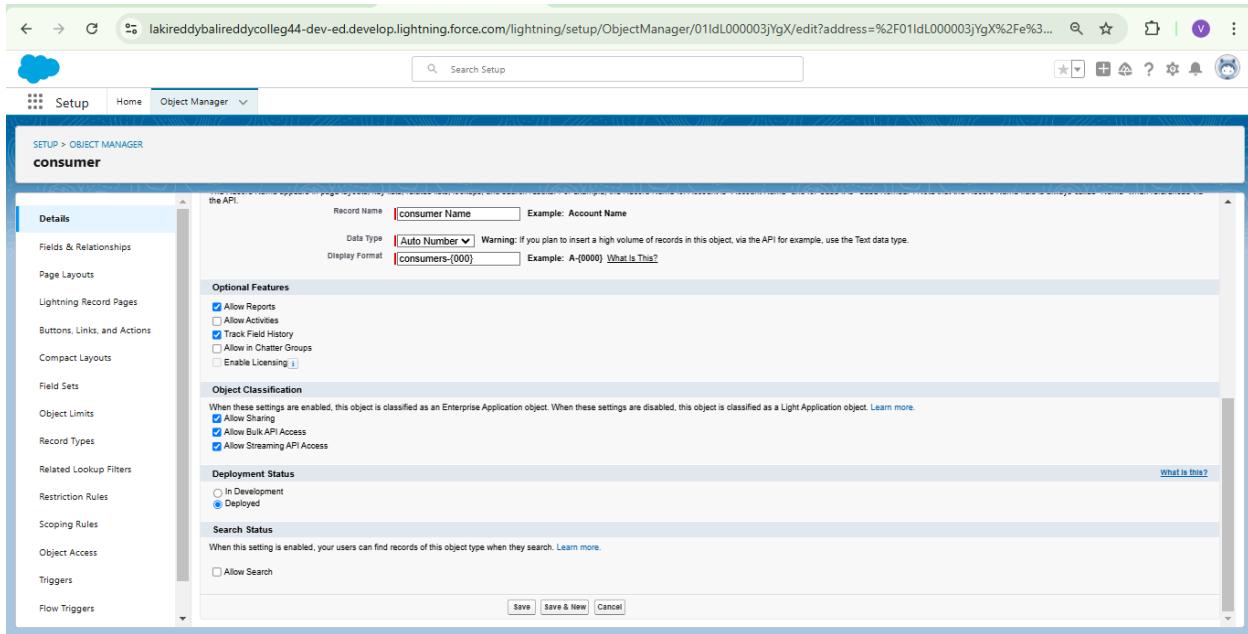
Content Name: [None]

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

| | | |
|-------------|---------------|-----------------------|
| Record Name | consumer Name | Example: Account Name |
|-------------|---------------|-----------------------|

Data Type: Auto Number Text Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.



Activity 4: Create Rice Details Object

Rice Details object in Salesforce, follow these steps:

Navigate to Setup Page:

- Click on the gear icon.
- Click on Setup.

Create a Custom Object:

- From the setup page, click on Object Manager.
- Click on Create.
- Click on Custom Object.

Define the Custom Object:

- Enter the Label Name: Rice Details.
- Enter the Plural Label Name: Rice Details.
- Enter the Record Name Label and Format:
 - Record Name: Leave it blank.
 - Data Type: Auto Number

- Display Format: rice-{000}
- Starting Number: 1

Set Additional Options:

- Click on Allow Reports.
- Click on Track Field History.
- Click on Allow Search.

Save the Custom Object:

- Click on Save.

The screenshot shows the Salesforce Object Manager interface. The URL in the browser is lakireddybalireddycolleg44-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IdL000003j7Ok/Details/view. The page title is "rice details".

The left sidebar contains navigation links: Setup, Home, and Object Manager. The main content area has two tabs: "Details" and "Fields & Relationships".

Details Tab Fields:

- Description: [Text input]
- API Name: rice_details__c
- Custom: ✓
- Singular Label: rice details
- Plural Label: rice details

Additional Options (Right Side):

- Enable Reports: ✓
- Track Activities
- Track Field History: ✓
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

Buttons at the top right: Edit and Delete.

The screenshots show the Salesforce Object Manager interface for creating a custom object named 'rice details'. The top screenshot displays the 'Custom Object Definition Edit' page, where the 'Label' is set to 'rice details' and the 'Plural Label' is also 'rice details'. The 'Record Name' field contains 'rice_details'. The bottom screenshot shows the 'Optional Features' section with checkboxes for 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'. It also shows the 'Deployment Status' section with 'Deployed' selected.

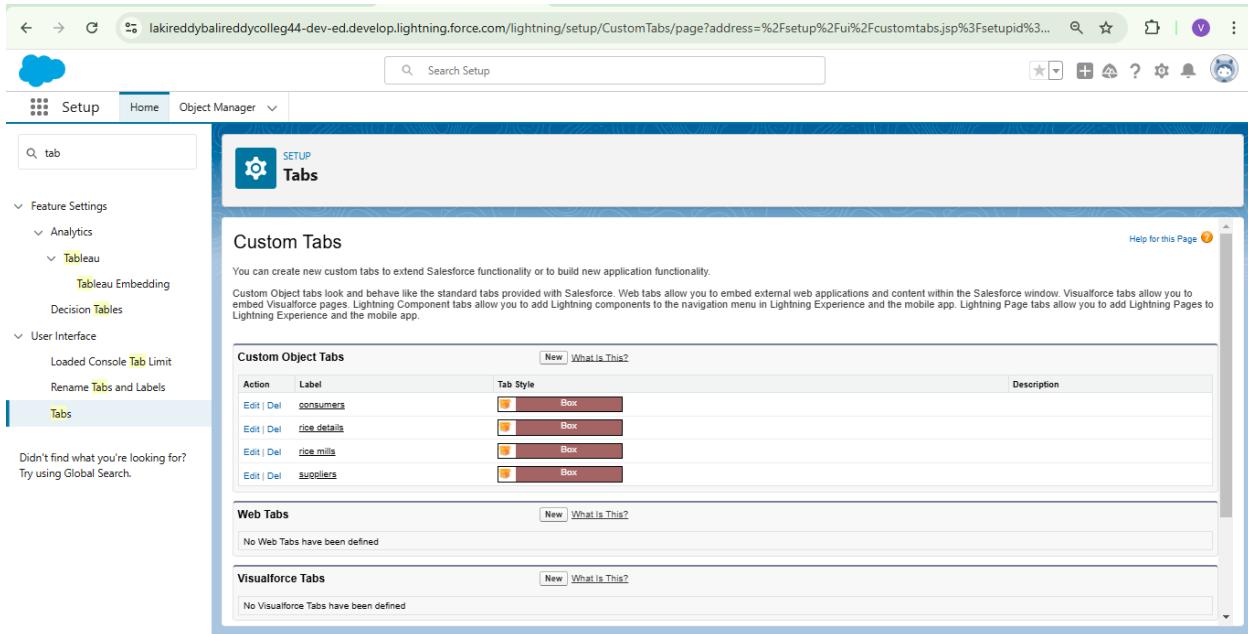
Milestone 3 - Tabs

What is a Tab?

A tab is a user interface element used to build records for objects and view the records within those objects.

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 tabs such

as accounts, contacts, and opportunities.



The screenshot shows the Salesforce Setup page with the URL lakireddybalireddycolleg44-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2Fcustomtabs.jsp%3Fsetupid%3D.... The left sidebar has sections like Feature Settings, Analytics, Tableau, User Interface, and Tabs, with 'Tabs' selected. The main content area is titled 'Custom Tabs' and contains three sections: 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. Under 'Custom Object Tabs', there is a table with four rows:

| Action | Label | Tab Style | Description |
|------------|--------------|-----------|-------------|
| Edit Del | consumers | Box | |
| Edit Del | rice_details | Box | |
| Edit Del | rice_mills | Box | |
| Edit Del | suppliers | Box | |

Activity 1: Creating a Custom Tab (Supplier)

To create a Tab for the Supplier object, follow these steps:

Navigate to Setup Page:

- Go to the setup page.
- Type "Tabs" in the Quick Find bar.
- Click on Tabs.

Create a New Custom Object Tab:

- Click on New under the Custom Object Tabs section.

Select Object and Tab Style:

- Select the Supplier object.
- Choose the tab style.
- Click on Next.

Add to Profiles Page:

- Keep it as default.
- Click on Next.

Add to Custom App:

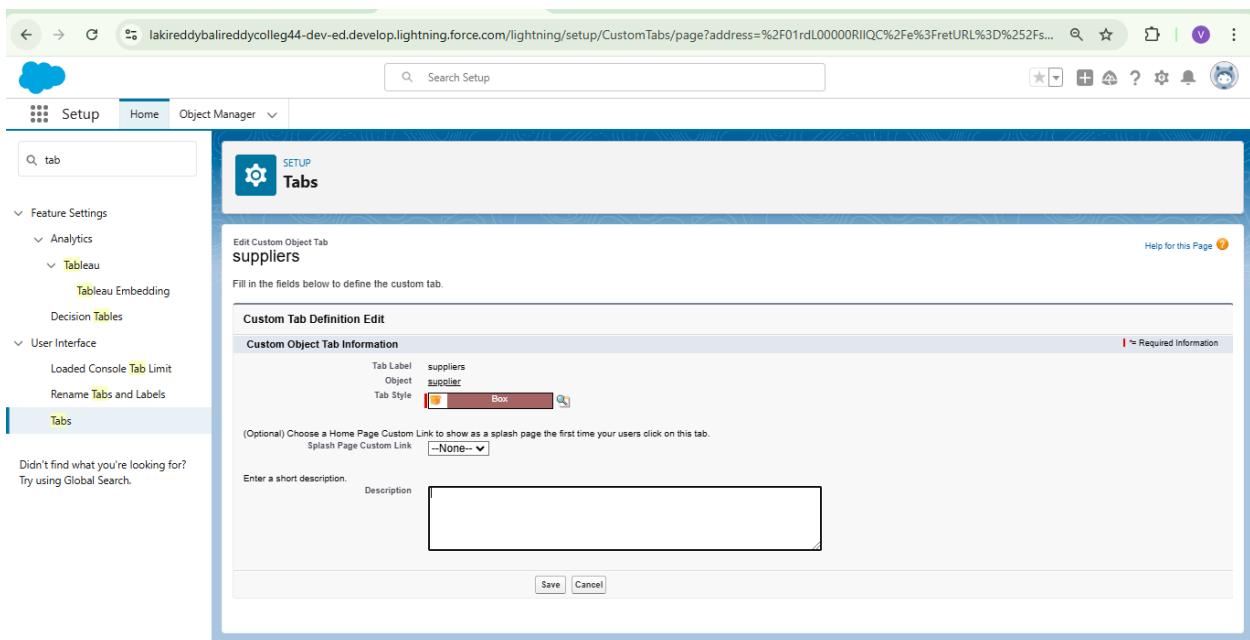
- Uncheck the Include Tab checkbox.

Append Tab to Users' Existing Personal Customizations:

- Ensure that the Append tab to users' existing personal customizations option is checked.

Save the Custom Tab:

- Click on Save.

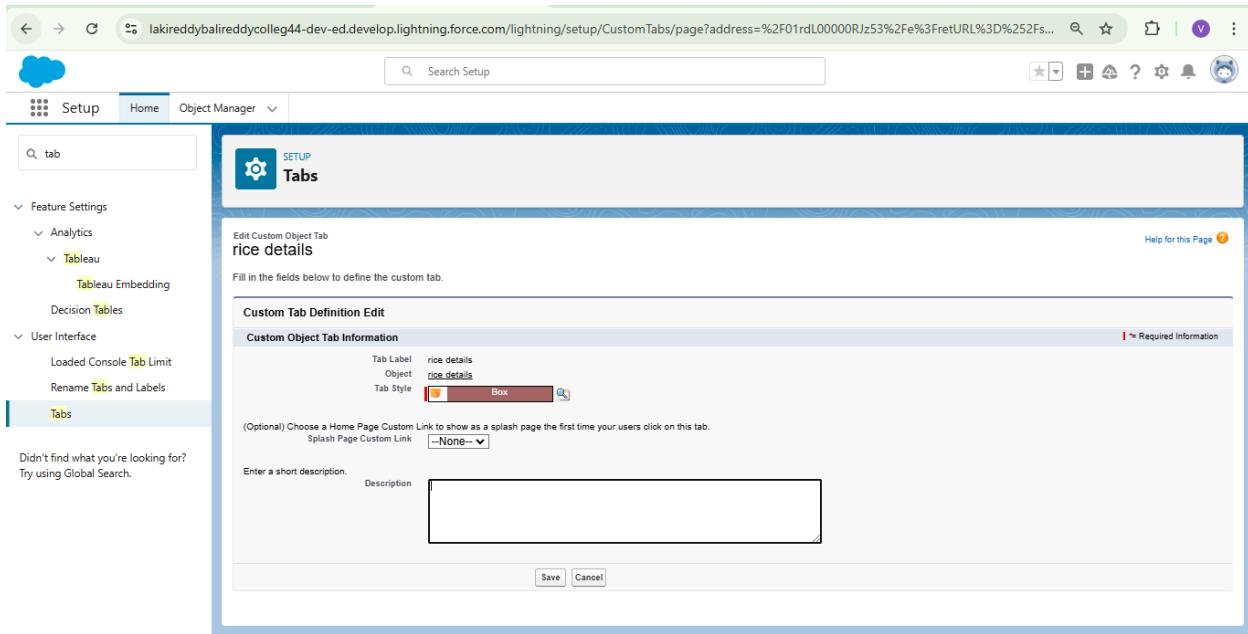


Activity 2: Creating Remaining Tabs

To create tabs for the remaining objects (Rice Mill, Consumer, Rice Details), follow the same steps as mentioned in Activity 1.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page open. The URL is lakireddybalireddycolleg44-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01dl00000Rjys9%2Fe%3FretURL%3D%252F.... The left sidebar shows 'Feature Settings' expanded, with 'Tableau' selected under 'Analytics'. The main content area is titled 'Edit Custom Object Tab consumers'. It contains fields for 'Tab Label' (consumers), 'Object' (consumer), and 'Tab Style' (Box). A note says '(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' A dropdown menu for 'Splash Page Custom Link' is set to 'None'. A 'Description' field is empty. At the bottom are 'Save' and 'Cancel' buttons.

This screenshot shows the same Salesforce Setup interface as the previous one, but with a different custom tab configuration. The URL is lakireddybalireddycolleg44-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01dl00000RHedV%2Fe%3FretURL%3D%252F.... The 'Tabs' section in the sidebar is highlighted. The main content area is titled 'Edit Custom Object Tab rice mills'. It shows the same fields as the previous screenshot: 'Tab Label' (rice mills), 'Object' (rice_mill), and 'Tab Style' (Box). The 'Splash Page Custom Link' dropdown is still set to 'None'. The 'Description' field is also empty. The 'Save' and 'Cancel' buttons are at the bottom.



Milestone 4 - The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your organization can work more efficiently by easily switching between apps.

Activity 1: Create a Lightning App

To create a Lightning app page, follow these steps:

Navigate to App Manager:

- Go to the setup page.
- Search for “App Manager” in the Quick Find bar.
- Select “App Manager”.
- Click on New Lightning App.

Fill in App Details:

- Enter the app name as MY RICE.
- Click Next.

App Options Page:

- Keep the settings as default.
- Click Next.

Utility Items Page:

- Keep the settings as default.
- Click Next.

Upload a Photo:

- Upload a photo that is related to your app.

Add Navigation Items:

- Select the items (Supplier, Rice Mill, Consumer, Rice Details) from the search bar.
- Move the selected items using the arrow button.
- Click Next.

Add User Profiles:

- Search for profiles (System Administrator) in the search bar.
- Click on the arrow button to add the profile.
- Click Save & Finish.

lakireddybalireddycolleg44-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Lightning Experience App Manager

| App Name ↑ | Developer Name | Description | Last Modified ... | App ... | Vis... |
|---------------------------|--------------------------|---|---------------------|-----------|--------|
| Content | Content | Salesforce CRM Content | 06/11/2024, 8:05 pm | Classic | ✓ |
| Data Manager | DataManager | Use Data Manager to view limits, monitor usage, and manage recipes. | 06/11/2024, 8:05 pm | Lightning | ✓ |
| Digital Experiences | SalesforceCMS | Manage content and media for all of your sites. | 06/11/2024, 8:05 pm | Lightning | ✓ |
| Lightning Usage App | LightningInstrumentation | View Adoption and Usage Metrics for Lightning Experience | 06/11/2024, 8:05 pm | Lightning | ✓ |
| Marketing CRM Classic | Marketing | Track sales and marketing efforts with CRM objects. | 06/11/2024, 8:05 pm | Classic | ✓ |
| MY RICE | MY_RICE | | 02/01/2025, 5:58 pm | Lightning | ✓ |
| Platform | Platform | The fundamental Lightning Platform | 06/11/2024, 8:05 pm | Classic | ✓ |
| Queue Management | QueueManagement | Create and manage queues for your business. | 06/11/2024, 8:05 pm | Lightning | ✓ |
| Sales | Sales | The world's most popular sales force automation (SFA) solution | 06/11/2024, 8:05 pm | Classic | ✓ |
| Sales | LightningSales | Manage your sales process with accounts, leads, opportunities, and more | 06/11/2024, 8:05 pm | Lightning | ✓ |
| Sales Console | LightningSalesConsole | (Lightning Experience) Lets sales reps work with multiple records on one screen | 06/11/2024, 8:05 pm | Lightning | ✓ |
| Salesforce Chatter | Chatter | The Salesforce Chatter social network, including profiles and feeds | 06/11/2024, 8:05 pm | Classic | ✓ |
| Salesforce Scheduler S... | LightningScheduler | Set up personalized appointment scheduling. | 06/11/2024, 8:08 pm | Lightning | ✓ |

lakireddybalireddycolleg44-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02udL000009ws4UQAQ&retUrl=https%3A%2F%2Flakireddybal...

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name

*Developer Name

Description

App Branding

Image Primary Color Hex Value

Use the app's image and color instead of the org's custom theme

App Launcher Preview

The screenshot shows the Lightning App Builder interface with the URL <https://lakireddybalireddycolleg44-dev-ed.lightning.force.com/visualEditor/appBuilder.app?id=02udL000009ws4UQAQ&retUrl=https%3A%2F%2Flakireddybal...>. The top navigation bar includes back, forward, search, and help icons. The main menu has tabs for Lightning App Builder, App Settings, Pages, and MY RICE. The left sidebar under 'App Settings' has sections for App Details & Branding, App Options, Utility Items (Desktop Only), and Navigation Items (which is selected). Under 'Navigation Items', there is a sub-section for User Profiles. The central workspace is titled 'Navigation Items' with a sub-instruction: 'Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.' It contains two panels: 'Available Items' (listing various Salesforce objects like Accounts, All Sites, Alternative Payment Methods, etc.) and 'Selected Items' (listing 'suppliers', 'rice mills', 'consumers', and 'rice details'). Arrows between the panels allow for moving items between them.

Milestone 5: Fields

When we talk about Salesforce, fields represent the data stored in the columns of a relational database. They can hold any valuable information that you require for a specific object. The overall searching, deletion, and editing of the records become simpler and quicker with fields.

Types of Fields:

- Standard Fields
- Custom Fields

Standard Fields

As the name suggests, 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 unless it is a non-required standard field. Otherwise, users have the option to delete them freely at any point from the application. Some common fields you will find in every Salesforce application include:

- 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 their requirements. Each organization or company can use them if necessary. It means you do not always need to include them in the records, unlike Standard Fields. Hence, the final decision depends on the user, who can add or remove custom fields as needed.

Activity 1: Creating the Number Field in Rice Details Object

To create a number field in the Rice Details object, follow these steps:

Navigate to Object Manager:

- Go to the setup page.
- Click on Object Manager.

Edit the Rice Details Object:

- From the dropdown, click Edit for the Rice Details object.

Create a New Field:

- Click on Fields & Relationships.
- Click on New.

Select Data Type:

- Select Number as the data type.
- Click Next.

Define Field Properties:

- Enter the Field Label as Rice Distributed.

- Set the length to 5.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "rice details". On the left, a sidebar lists various setup options under "Fields & Relationships". The right pane displays the "Custom Field Definition Detail" for the "rice distributed" field. Key details shown include:

| Field Label | rice distributed | Object Name | rice_details |
|---------------------------|---|-------------|---|
| Field Name | rice_distributed | Data Type | Number |
| API Name | rice_distributed__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Veliseela Sravanthi 03/01/2025, 3:01 pm | Modified By | Veliseela Sravanthi 03/01/2025, 3:01 pm |
| General Options | | | |
| Required | <input type="checkbox"/> | | |
| Unique | <input type="checkbox"/> | | |
| External ID | | | |

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. It allows you to create a relationship between records of two different objects by creating a many-to-many relationship model.

Creating Junction Object: Rice Details with Supplier & Rice Mill To create a Junction Object:

Navigate to Object Manager:

- Go to the setup page.
- Click on Object Manager.
- From the dropdown, click Edit for the Rice Details object.

Create a New Field:

- Click on Fields & Relationships.
- Click on New.

Select Data Type:

- Select Master-Detail Relationship as the data type.
- Click Next.

Relate to Supplier Object:

- Select the related object Supplier.
- Click Next.

Define Field Properties:

- Give the Field Label as Supplier Name.
- Click Next.
- Click Next again.
- Click Save & New.

Repeat Steps for Rice Mill Object:

- Follow the same steps from 1 to 3.
- Select the related object Rice Mill.
- Click Next.

Define Field Properties for Rice Mill:

- Give the Field Label as Rice Mill 1 (one).
- Click Next.
- Click Next again.
- Click on Save.

The image contains two screenshots of the Salesforce Object Manager interface, illustrating the creation of Master-Detail relationships.

Screenshot 1: Supplier Name Custom Field

This screenshot shows the configuration of a custom field named "Supplier Name" for the "rice details" object. The field is defined as a Master-Detail type, related to the "supplier" object. The "Related To" field is set to "supplier".

| Field Label | Field Name | API Name | Object Name | Data Type |
|---------------|------------|------------|--------------|---------------|
| supplier Name | supplier | supplier_c | rice details | Master-Detail |

Screenshot 2: rice mill 1 Custom Field

This screenshot shows the configuration of a custom field named "rice mill 1" for the "rice details" object. This field is also defined as a Master-Detail type, related to the "rice_mill" object. The "Related To" field is set to "rice_mill".

| Field Label | Field Name | API Name | Object Name | Data Type |
|-------------|------------|-------------|--------------|---------------|
| rice mill 1 | rice_mill | rice_mill_c | rice details | Master-Detail |

Activity 3: Creating a Master-Detail Relationship

A 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:

Navigate to Object Manager:

- Go to the setup page.
- Click on Object Manager.
- From the dropdown, click Edit for the Consumer object.

Create a New Field:

- Click on Fields & Relationships.
- Click on New.

Select Data Type:

- Select Master-Detail Relationship as the data type.
- Click Next.

Relate to Rice Mill Object:

- Select the related object Rice Mill.
- Click Next.

Define Field Properties:

- Give the Field Label as Rice Mill Name.
- Click Next. , Click Next again.
- Click Save.

The screenshot shows the Salesforce Object Manager interface. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main area displays a 'Custom Field Definition Detail' for a field named 'rice mill name'. The field is defined as a Master-Detail type, related to the 'rice mill' object. The 'Object Name' is 'consumer' and the 'Data Type' is 'Master-Detail'. The field has a label 'rice mill name', a field name 'rice_mill_name', and an API name 'rice_mill_name__c'. It was created by 'Velisella Sravanthi' on 03/01/2025 at 3:07 pm and modified by the same user on 03/01/2025 at 3:49 pm.

Activity 4: Creating the Roll-up Summary

A roll-up summary field is a field that summarizes data from a child object to a parent object that shares a masterdetail relationship. Roll-up summary fields can use the COUNT, SUM, MIN, and MAX functions. For example, you could use a roll-up 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

To create a Roll-up Summary field:

Navigate to Object Manager:

- Go to the setup page.
- Click on Object Manager.
- Type the object name Supplier in the search bar.
- Click on the object.

Create a New Field:

- Click on Fields & Relationships.
- Click on New.

Select Data Type:

- Select the data type as Roll-up Summary.
- Click Next.

Define Field Properties for Supplier:

- Give the Field Label as Sum of Rice Distributed. The Field Name will be auto-generated.
- Click Next.

Configure Roll-up Summary for Supplier:

- Select the summarized object as Rice Details.
- Select the roll-up type as SUM.
- Select the field to aggregate as Rice Distributed.
- Click Next
- Click Next again
- Click Save.

The screenshot shows the Salesforce Object Manager interface. A custom field named 'sum of rice distributed' is being configured for the 'supplier' object. The field is of type 'Roll-up Summary' and is summarizing the 'rice details' object, aggregating the 'rice distributed' field. The configuration page includes sections for 'Field Information' and 'Roll-Up Summary Options'.

Repeat Steps for Rice Mill Object:

- Follow the same steps from 1 to 3 for the Rice Mill object.
- Give the Field Label as Rice Distributed to Shops. The Field Name will be auto-generated.
- Click Next.

Configure Roll-up Summary for Rice Mill:

- Select the summarized object as Rice Details.
- Select the roll-up type as SUM.
- Select the field to aggregate as Rice Distributed.
- Click Next. ,
- Click Next again.
- Click Save.

The screenshot shows the Salesforce Object Manager interface. A custom field named 'rice distributed to shops' has been created on the 'rice mill' object. The field is of type 'Roll-Up Summary' and is set to sum up values from the 'rice details' object. The field label is 'rice distributed to shops' and its API name is 'rice_distributed_to_shops__c'. The field is associated with the 'rice mill' object.

Additional Steps for Consumer Object

Create the Field:

- Create the field Rice Taken by Shops in Kgs using the number datatype in the Consumer object.

Repeat Steps for Rice Mill Object:

- Follow the same steps from 1 to 3 for the Rice Mill object.
- Give the Field Label as Rice Taken. The Field Name will be auto-generated.
- Click Next.

Configure Roll-up Summary for Rice Mill (Consumer):

- Select the summarized object as Consumer.
- Select the roll-up type as SUM.
- Select the field to aggregate as Rice Taken in Shops.
- Click Next .
- Click Next again.

- Click Save.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A custom field named 'rice taken' is being edited for the 'rice mill' object. The 'Field & Relationships' tab is active. The 'Custom Field Definition Detail' section displays the following information:

| Custom Field Definition Detail | |
|---|--|
| Field Information | Object Name: rice_mill |
| Field Label: rice taken | |
| Field Name: rice_taken | |
| API Name: rice_taken_c | |
| Description: | |
| Help Text: | |
| Data Owner: | |
| Field Usage: | |
| Data Sensitivity Level: | |
| Compliance Categorization: | |
| Created By: Veisella Sravanti 03/01/2025, 3:18 pm | Modified By: Veisella Sravanti 03/01/2025, 3:18 pm |
| Roll-Up Summary Options | |
| Data Type: Roll-Up Summary | Summary Type: SUM |
| Summarized Object: consumer | |
| Field to Aggregate: consumer_rice_taken_by_shops_in_kgs | |

Activity 5: Creating Fields in Objects

Creating the number field in the Rice Details object.

Navigate to Setup:

- Go to the setup page.
- Click on "Object Manager" from the top navigation menu.

Edit Rice Details Object:

- In Object Manager, find and select "Rice Details" from the list of objects.
- Click on "Fields & Relationships."

Create New Field:

- Click on the "New" button to create a new field.

Select Data Type:

- Choose "Number" as the data type for the field.

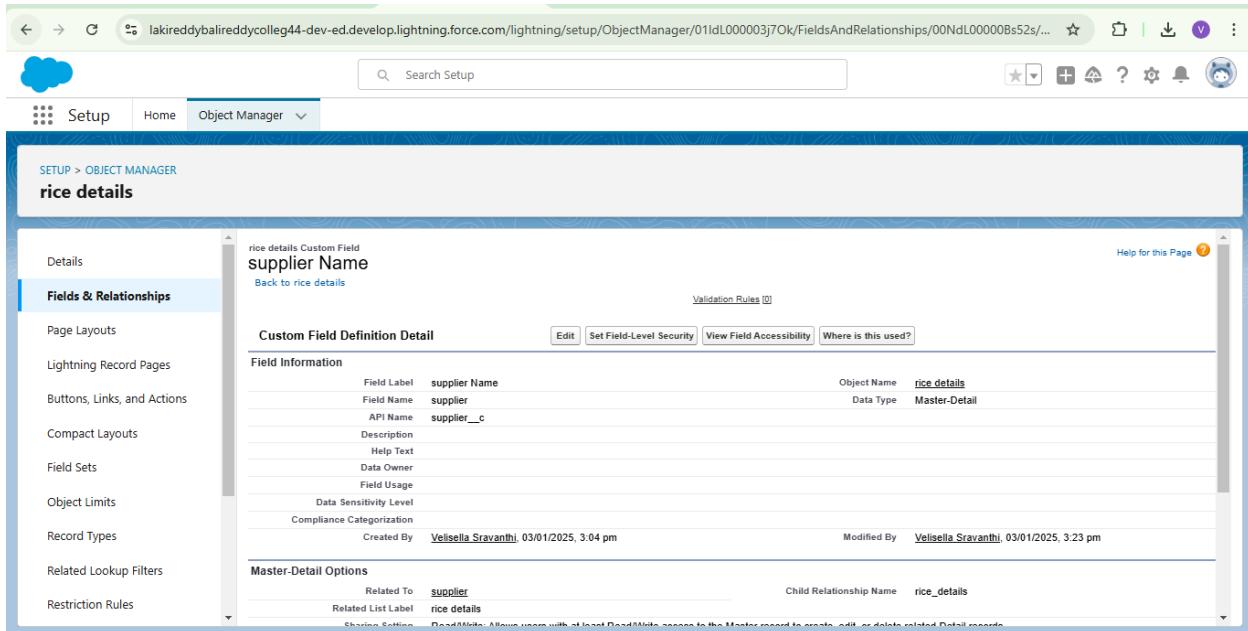
- Click "Next."

Define Field Properties:

- Enter "Supplier Name" as the Field Label.
- Set the length to "5" (assuming this refers to the precision or size of the number).
- Field Name will be automatically populated based on the label.

Proceed with Creation:

- Click "Next" to proceed through any additional screens.
- Review the field details and click "Save" to create the new field.



Activity 6: Creating Fields in Rice Mill Objects

Navigate to Setup:

- Go to the setup page.
- Click on "Object Manager" from the top navigation menu.

Edit Rice Mills Object:

- In Object Manager, find and select "Rice Mills" from the list of objects.
- Click on "Fields & Relationships."

Create New Field:

- Click on the "New" button to create a new field.

Select Data Type:

- Choose "Number" as the data type for the field.
- Click "Next."
- Given the Field Label as "Rice Price/kg" and length as "5".

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Home, Object Manager, and a search bar. The main content area displays the 'rice mill' object details. On the left, a sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Buttons, Links, and Actions. The right pane shows the 'Custom Field Definition Detail' for a field named 'rice price/kg'. The field information table includes columns for Field Label (rice price/kg), Field Name (rice_price_kg), API Name (rice_price_kg_c), Object Name (rice mill), and Data Type (Number). Other visible fields include Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By (Velisella Sravanti), and Modified By (Velisella Sravanti). The bottom section shows General Options with checkboxes for Required and Unique.

Activity 7: Creating Fields in Consumer Objects

Navigate to Setup:

- Go to the setup page.

- Click on "Object Manager" from the top navigation menu.

Edit Consumer Object:

- In Object Manager, find and select "Consumer" from the list of objects.
- Click on "Fields & Relationships."

Create New Field For First Name:

consumer Custom Field
First name

[Back to consumer](#)

Custom Field Definition Detail

| Field Information | | Validation Rules | |
|---------------------------|---|------------------|--------------------------|
| Field Label | First name | Object Name | consumer |
| Field Name | First_name | Data Type | Text |
| API Name | First_name__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Veliseela Sravanthi 03/01/2025, 3:34 pm | | |
| Modified By | Veliseela Sravanthi 03/01/2025, 3:34 pm | | |
| General Options | | | |
| Required | <input checked="" type="checkbox"/> | Unique | <input type="checkbox"/> |

Create New Field For Last Name:

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "SETUP > OBJECT MANAGER consumer". On the left, a sidebar lists various setup options under "Fields & Relationships". The main content area displays the "Last name" custom field for the "consumer" object. The field information includes:

| Field Label | Field Name | Object Name |
|---------------------------|-------------|-------------|
| Last name | Last_name | consumer |
| API Name | Last_name_c | Data Type |
| Description | | Text |
| Help Text | | |
| Data Owner | | |
| Field Usage | | |
| Data Sensitivity Level | | |
| Compliance Categorization | | |

Below the field information, it shows the field was created by "Velisella Sravanthi" on 03/01/2025, 3:35 pm, and modified by the same user at the same time. Under "General Options", there are checkboxes for "Required" and "Unique".

Create New Field For Email:

The screenshot shows the Salesforce Object Manager interface, similar to the previous one but for the "email" custom field. The main content area displays the "email" custom field for the "consumer" object. The field information includes:

| Field Label | Field Name | Object Name |
|---------------------------|------------|-------------|
| email | email | consumer |
| API Name | email_c | Data Type |
| Description | | Email |
| Help Text | | |
| Data Owner | | |
| Field Usage | | |
| Data Sensitivity Level | | |
| Compliance Categorization | | |

Below the field information, it shows the field was created by "Velisella Sravanthi" on 03/01/2025, 3:37 pm, and modified by the same user at the same time. Under "General Options", there are checkboxes for "Required" and "Unique".

Create New Field For Rice taken by Shops:

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'Fields & Relationships' under 'consumer'. The main content area is titled 'Rice taken by shops' and shows the 'Custom Field Definition Detail' for this field. The field information includes:

| Field Label | Rice taken by shops | Object Name | consumer |
|---------------------------|-----------------------|-------------|---------------------|
| Field Name | Rice_taken_by_shops | Data Type | Number |
| API Name | Rice_taken_by_shops_c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Velisella Sravanthi | Modified By | Velisella Sravanthi |
| | 03/01/2025, 3:39 pm | | 03/01/2025, 3:39 pm |

The 'General Options' section shows 'Required' checked and 'Unique' unchecked.

Create New Field For Rice Type:

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'Fields & Relationships' under 'consumer'. The main content area is titled 'Rice type' and shows the 'Custom Field Definition Detail' for this field. The field information includes:

| Field Label | Rice type | Object Name | consumer |
|---------------------------|---------------------|-------------|---------------------|
| Field Name | Rice_type | Data Type | Picklist |
| API Name | Rice_type_c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Velisella Sravanthi | Modified By | Velisella Sravanthi |
| | 03/01/2025, 3:41 pm | | 03/01/2025, 3:41 pm |

The 'General Options' section shows 'Required' checked and 'Default Value' set to 1.

Create New Field For Phone Number :

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named 'Phone number' has been created for the 'consumer' object. The field details are as follows:

- Field Label:** Phone number
- Field Name:** Phone_number
- API Name:** Phone_number_c
- Description:** (empty)
- Data Type:** Phone
- Object Name:** consumer
- Created By:** Velisella Sravanthi, 03/01/2025, 3:36 pm
- Modified By:** Velisella Sravanthi, 03/01/2025, 3:36 pm
- General Options:**
 - Required:
 - Default Value: (empty)

Create New Field For Mode of Payment :

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named 'Mode of payment' has been created for the 'consumer' object. The field details are as follows:

- Field Label:** Mode of payment
- Field Name:** Mode_of_payment
- API Name:** Mode_of_payment_c
- Description:** (empty)
- Data Type:** Picklist
- Object Name:** consumer
- Created By:** Velisella Sravanthi, 03/01/2025, 3:42 pm
- Modified By:** Velisella Sravanthi, 03/01/2025, 3:42 pm
- General Options:**
 - Required:
 - Default Value: (empty)

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.

- Go to setup → click on Object Manager → type object name (consumer) in the search bar Click on Fields & Relationships → click on New.
- Select Data type as “Formula” and click Next.
- Give Field Label and Field Name as “Amount Paid” and select formula return type as “Number” Formula : rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a cloud icon, a back arrow, a forward arrow, a refresh icon, a search bar with the placeholder 'Search Setup', and various user icons. The main header says 'SETUP > OBJECT MANAGER consumer'. On the left, a sidebar lists options like 'Details', 'Fields & Relationships' (which is selected), 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Restriction Rules'. The main content area displays the 'Amount Paid' custom field definition. It has a title 'consumer Custom Field Amount Paid' and a link 'Back to consumer'. Below this is a 'Custom Field Definition Detail' section with tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' tab is active, showing details such as Field Label: 'Amount Paid', Field Name: 'Amount_Paid', API Name: 'Amount_Paid_c', Description: ' ', Help Text: ' ', Data Owner: ' ', Field Usage: ' ', Data Sensitivity Level: ' ', Compliance Categorization: ' ', Created By: 'Veliseela Sravanthi' (03/01/2025, 3:50 pm), Modified By: 'Veliseela Sravanthi' (03/01/2025, 3:50 pm), Object Name: 'consumer', and a note 'Help for this Page'. The 'Formula Options' tab is also visible, showing Data Type: 'Formula' and Decimal Places: '2'.

- Give Field Label and Field Name as “Amount Paid” and select formula return type as “Number” and Next.
- Go to setup → click on Object Manager → type object name (consumer) in the search bar
- Click on Fields & Relationships → click on New.
- Select Data type as “Formula”, click Next.
- Give Field Label and Field Name as “Consumer Name” and select formula return type as “TEXT”, click Next.
- Insert field formula should be: First_Name__c + ' ' + Last_Name__c , Check For syntax.

Activity 9: 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

- Go to the setup page → click on Object Manager → from the dropdown click edit for the consumer object.
- Click on Validation Rules → click New.
- Enter the Rule Name as “Phonenumberoremailblankrule”.
- Enter the Description as “Phone number and email should not be blank”.
- Enter the formula as: OR(ISBLANK(phone_number__c), ISBLANK(email__c)).
- Check the syntax.
- Under the Error Message , Write “Please fill in your Phone Number”.
- Save Validation rule .

The screenshot shows the Salesforce Object Manager interface for the 'consumer' object. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'consumer Validation Rule' and displays the following details:

- Validation Rule Detail**: Rule Name - Phonenumberoremailblankrule, Active checked.
- Error Condition Formula**: OR(ISBLANK(Phone_number__c), ISBLANK(email__c))
- Error Message**: please fill in your phone number.
- Description**: phone number and email number should not be blank
- Created By**: Velisella Sravanti, 03/01/2025, 3:56 pm
- Modified By**: Velisella Sravanti, 03/01/2025, 3:56 pm

Overall Supplier Fields

The screenshot shows the Salesforce Object Manager interface for the 'supplier' object. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Fields & Relationships' and displays the following table:

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|-------------------------|----------------------------|------------------------------------|-------------------|---------|
| Created By | CreatedById | Lookup(User) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| sum of rice distributed | sum_of_rice_distributed__c | Roll-Up Summary (SUM rice details) | | |
| supplier Name | Name | Text(80) | | ✓ |

Overall Rice Mills Fields

The screenshot shows the Salesforce Object Manager interface for the 'rice mill' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, Buttons, etc. The main content area is titled 'Fields & Relationships' and displays seven items sorted by field label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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

Overall Rice Details Field

The screenshot shows the Salesforce Object Manager interface for the 'rice details' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, Buttons, etc. The main content area is titled 'Fields & Relationships' and displays six items sorted by field label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|-------------------|--------------------|--------------------------|-------------------|---------|
| Created By | CreatedById | Lookup(User) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| rice details Name | Name | Auto Number | ✓ | ▼ |
| rice distributed | rice_distributed_c | Number(5, 0) | | ▼ |
| rice mill 1 | rice_mill_c | Master-Detail(rice mill) | ✓ | ▼ |
| supplier Name | supplier_c | Master-Detail(supplier) | ✓ | ▼ |

Overall Consumer Fields

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main content area is titled 'Fields & Relationships' and displays a table of 14 items, sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Amount Paid (Amount_Paid__c, Formula (Number)), Consumer Name (Consumer_Name__c, Formula (Text)), consumer Name (Name, Auto Number), Created By (CreatedBy__d, Lookup(User)), email (email__c, Email), First name (First_name__c, Text(50)), and Last Modified By (LastModifiedBy__d, Lookup(User)).

This screenshot shows the same Salesforce Object Manager interface for the 'consumer' object, but with a different set of fields listed in the 'Fields & Relationships' table. The fields shown are: Last modified by (LastModifiedDate__y, Lookup(user)), Last name (Last_name__c, Text(50)), Mode of payment (Mode_of_payment__c, Picklist), Phone number (Phone_number__c, Phone), rice mill name (rice_mill_name__c, Master-Detail(rice mill)), Rice taken by shops (Rice_taken_by_shops__c, Number(5, 0)), rice taken by shops in kgs (rice_taken_by_shops_in_kgs__c, Number(18, 0)), and Rice type (Rice_type__c, Picklist).

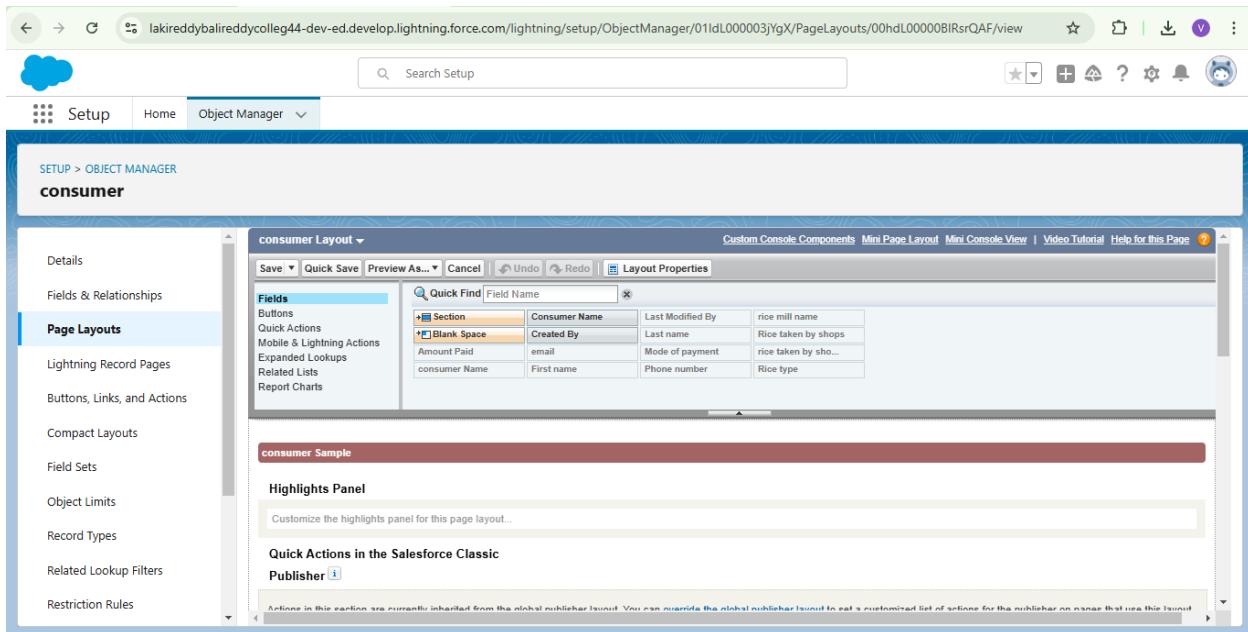
Milestone 6: Page Layouts

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

- Go to Setup → Click on Object Manager → Search for the object (consumer) → From the dropdown select the object and click on it.
- Click on Page Layout → Click on New.
- Select the existing page layout, and give the page layout name as “consumer layout”, and click Save.
- Drag and drop the section field to Consumer Details and create the section.
- Enter the section name as “Personal Details”, → click Ok.
- Now drag the fields to this section that are mentioned: First Name , Last Name , Consumer Name , etc. I Follow the same process for another two sections as shown above. They are:
- Section: "Rice Details" Fields: Rice Taken by Shop, Rice Type
- Section: "Receipt Details" Fields: Mode of Payment, Amount Paid
- Click Save.

The screenshot shows the Salesforce Object Manager interface for the 'consumer' object. The left sidebar has a 'Page Layouts' section selected. The main area displays a table titled 'Page Layouts' with one item: 'consumer Layout' created by 'Velisella Sravanthi' on 02/01/2025 at 5:35 pm, last modified by the same user on 03/01/2025 at 4:11 pm. The table includes columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. Navigation links like 'Quick Find', 'New', and 'Page Layout Assignment' are visible at the top of the table. The browser address bar shows the URL for the Object Manager setup page.



Milestone 7: Profiles

A profile is a group/collection of settings and permissions that define what a user can do in Salesforce. Profiles control object permissions, field permissions, user permissions, tab settings, app settings, Apex class access, Visualforce page access, page layouts, record types, login hours, and 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 the following standard profiles:

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User

- System Administrator

2. Custom Profiles

Custom profiles are defined by us. They can be deleted if there are no users assigned with that particular profile.

Activity 1: Owner Profile

To create a new profile:

- Go to Setup → type "Profiles" in the quick find box → click on Profiles → clone the desired profile (Standard User) → enter profile name (Owner) → Save.
- 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.
- Give access and save it.

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

- Page Header:** Shows the URL `lakireddybalireddycolleg44-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edL00000rAfB%2Fe%3FretURL%3D...`, a search bar labeled "Search Setup", and various navigation icons.
- Left Sidebar:** Includes links for "Setup", "Home", "Object Manager", and a search bar with the query "profile".
- Current Page:** The "Profiles" page under the "SETUP" tab, specifically the "Profile Edit" screen for the "Owner" profile.
- Profile Edit Form:**
 - Name:** owner
 - User License:** Salesforce
 - Description:** (Empty text area)
 - Buttons:** Save, Save & New, Cancel
 - Custom Profile:** A checked checkbox.
- Custom App Settings Section:**

| | Visible | Default | | Visible | Default |
|---------------------------------------|-------------------------------------|-----------------------|---|-------------------------------------|----------------------------------|
| All Tabs (standard__AllTabSet) | <input checked="" type="checkbox"/> | <input type="radio"/> | Queue Management (standard__QueueManagement) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| Analytics Studio (standard__Insights) | <input checked="" type="checkbox"/> | <input type="radio"/> | Sales (standard__LightningSales) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| App Launcher (standard__AppLauncher) | <input checked="" type="checkbox"/> | <input type="radio"/> | Sales (standard__Sales) | <input type="checkbox"/> | <input checked="" type="radio"/> |
| Automation (standard__FlowsApp) | <input checked="" type="checkbox"/> | <input type="radio"/> | Sales Console (standard__LightningSalesConsole) | <input checked="" type="checkbox"/> | <input type="radio"/> |

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Password Policies

- User passwords expire in: 90 days
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 10

Profile Detail

| Name | owner | Custom Profile | |
|--------------|--|-------------------------------------|--|
| User License | Salesforce | <input checked="" type="checkbox"/> | |
| Description | | | |
| Created By | Veisalika Sravanti 03/01/2025, 4:13 pm | Modified By | Veisalika Sravanti 03/01/2025, 4:16 pm |

Page Layouts

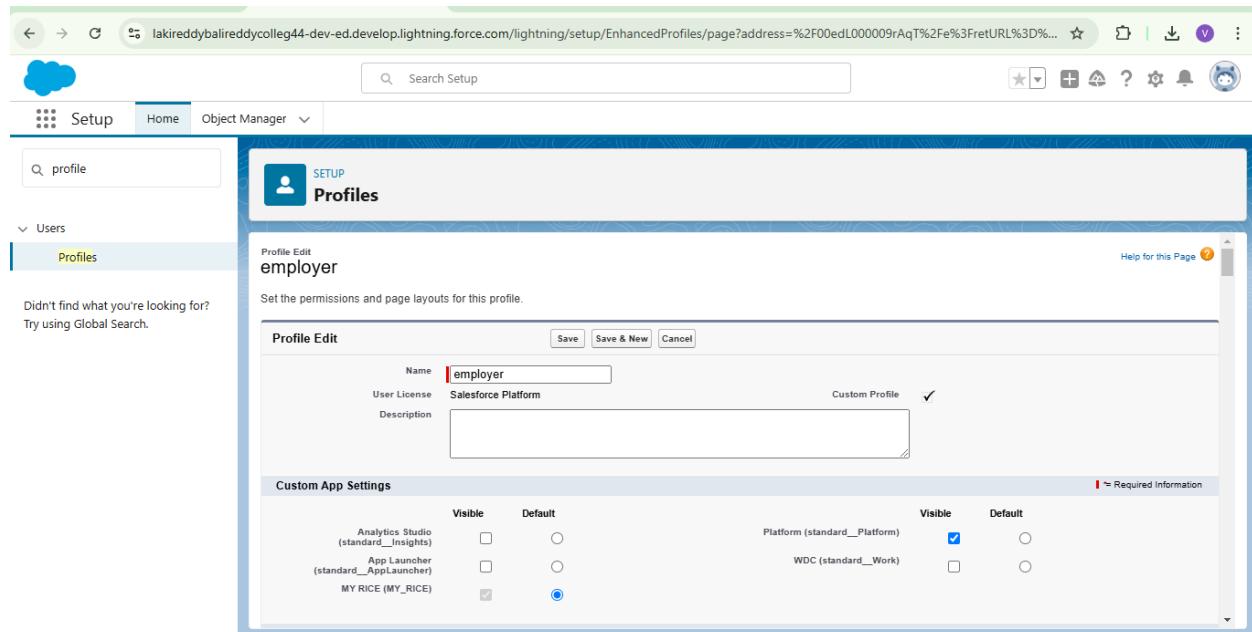
| Standard Object Layouts | Global | Invoice |
|----------------------------|--|--|
| Global | Global Layout [View Assignment] | Invoice Layout [View Assignment] |
| Email Application | Not Assigned [View Assignment] | Invoice Line Layout [View Assignment] |
| Home Page Layout | DE Default [View Assignment] | Lead Layout [View Assignment] |
| Account | Account Layout [View Assignment] | Legal Entity Layout [View Assignment] |
| Alternative Payment Method | Alternative Payment Method Layout [View Assignment] | Location Layout [View Assignment] |
| Appointment Invitation | Appointment Invitation Layout [View Assignment] | Location Group Layout [View Assignment] |

Activity 2: Employer Profile

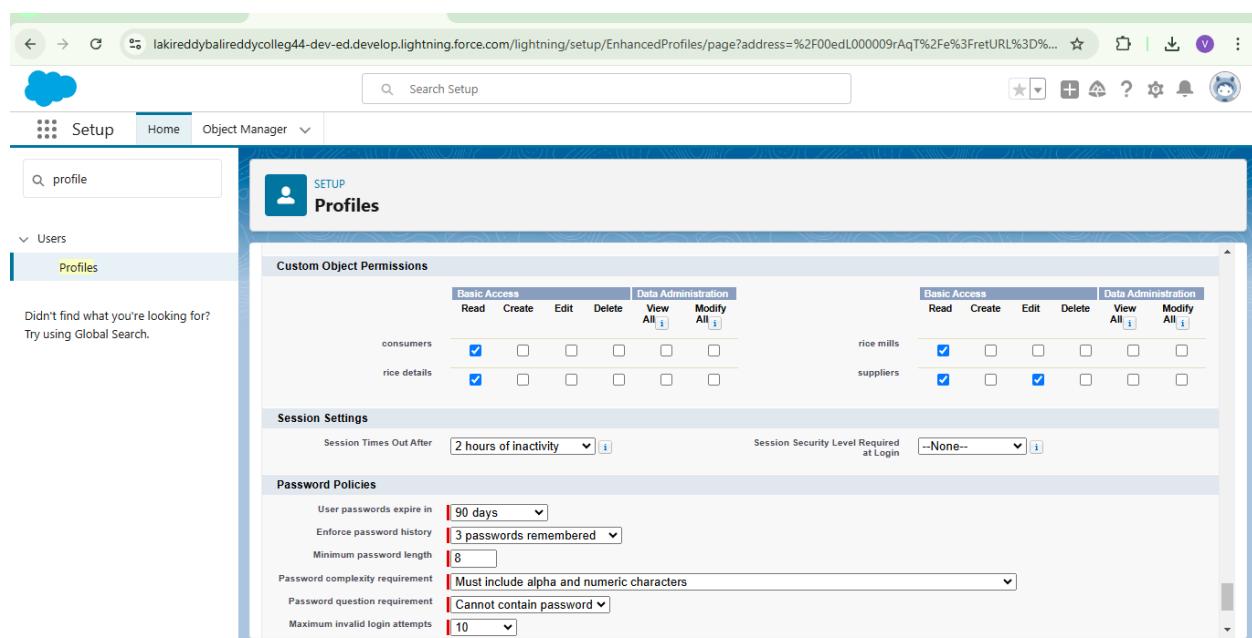
To create a new profile:

- Go to Setup → type "Profiles" in the quick find box → click on Profiles → clone the desired profile (Standard Platform User) → enter profile name (Employer) → Save.
- While still on the profile page, click Edit.

- Select the Custom App settings as default for the rice mill.
- I 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.
- Click Save.



The screenshot shows the 'Profiles' page in the Salesforce Setup. The 'employer' profile is selected. In the 'Custom App Settings' section, the 'MY RICE (MY_RICE)' app is set as the default. Other apps like Analytics Studio and App Launcher have their 'Visible' checkboxes checked.



The screenshot shows the 'Custom Object Permissions' section for the 'employer' profile. It lists four objects: consumers, rice details, rice mills, and suppliers. For each, it shows basic access (Read, Create, Edit, Delete) and data administration (View All, Modify All) checkboxes. The 'rice mills' object has its 'Modify All' checkbox checked under data administration.

The screenshot shows the Salesforce Setup interface with the URL lakireddybalireddycolleg44-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edL000009rAqT. The page is titled "Profiles" and shows a profile named "employer". The "Profile Detail" section includes fields for Name (employer), User License (Salesforce Platform), Description, Created By (Velisella Sravanti), and Modified By (Velisella Sravanti). Below this, the "Page Layouts" section lists standard object layouts for various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, and Appointment Invitation. Each object has a global layout assigned.

Activity 3: Workers Profile

To create a new profile:

- Go to Setup → type "Profiles" in the quick find box → click on Profiles → clone the desired profile (Standard Platform User) → enter profile name (Workers) → Save.
- While still on the profile page, click Edit.
- Select the Custom App settings as default for the rice mill.
- 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.
- Click Save.

The screenshot shows the Salesforce Setup interface under the Profiles section. A new profile named "worker" is being created. The profile is based on the "Salesforce Platform" license and has a "Custom Profile" checkbox selected. In the "Custom App Settings" section, the "MY RICE (MY_RICE)" app is set as the default. The "Platform (standard_Platform)" app is also checked.

Profile Edit
worker

Set the permissions and page layouts for this profile.

Profile Edit

Name: worker

User License: Salesforce Platform

Description:

Custom Profile:

Custom App Settings

| | Visible | Default | | Visible | Default |
|--------------------------------------|-------------------------------------|----------------------------------|------------------------------|-------------------------------------|-----------------------|
| Analytics Studio (standard_Insights) | <input type="checkbox"/> | <input checked="" type="radio"/> | Platform (standard_Platform) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| App Launcher (standard_AppLauncher) | <input type="checkbox"/> | <input checked="" type="radio"/> | WDC (standard_Work) | <input type="checkbox"/> | <input type="radio"/> |
| MY RICE (MY_RICE) | <input checked="" type="checkbox"/> | <input checked="" type="radio"/> | | | |

The screenshot shows the continuation of the Salesforce Setup interface under the Profiles section. It displays the "Custom Object Permissions" and "Password Policies" sections.

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

| | |
|----------------------------------|---|
| User passwords expire in: | 90 days |
| Enforce password history: | 3 passwords remembered |
| Minimum password length: | 8 |
| Password complexity requirement: | Must include alpha and numeric characters |
| Password question requirement: | Cannot contain password |
| Maximum invalid login attempts: | 10 |

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 your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Activity 1: Creating Owner Role

Creating Owner Role:

- Go to Quick Find → search for Roles → click on Set Up Roles.
- Click on Expand All and click on Add Role under whom this role works.
- Give Label as “Owner” and Role Name gets auto-populated. Then click on Save.
- Click and save it.

Activity 2: Creating Employer Roles

Creating Another Two Roles Under Manager:

- Go to Quick Find → search for Roles → click on Set Up Roles.
- Click the plus on CEO role, and click Add Role under Owner.
- Give Label as “Employer” and Role Name gets auto-populated. Then click on Save.
- Repeat the same steps for another role.
- Click the plus on CEO role, and click the plus on Owner, and click Add Role under Employer.
- Give Label as “Worker” and Role Name gets auto-populated.
- Then click on Save.

The screenshot shows the Salesforce Setup interface for managing Roles. The left sidebar has a navigation menu with 'Users' and 'Roles' selected. The main content area is titled 'Creating the Role Hierarchy' and shows a tree view of roles. At the top of the tree is 'LAKIREDDY BALI REDDY COLLEGE OF ENGINEERING'. Below it are several roles: 'CEO', 'CFO', 'COO', 'owner', 'SVP_Customer Service & Support', 'SVP_Human Resources', and 'SVP_Sales & Marketing'. Each role node has three small icons: 'Edit', 'Del', and 'Assign'. There is also a 'Show in tree view' button at the top right of the tree area.

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

- Go to Setup → type "Users" in the quick find box → select Users → click New User.

- Fill in the fields:
- First Name: Vicky
- Last Name: Y
- Alias: vy
- Email ID: sravanthivelisella@gmail.com
- Username: vicky.y2165@example.com
- Nickname: Vicky
- Role: Owner
- User License: Salesforce
- Profile: Owner
- Save it.

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

User Detail

| Name | vicky y | Role | owner |
|------------|---|---------------------------|-------------------------------------|
| Alias | vy | User License | Salesforce |
| Email | sravanthivelisella@gmail.com (Verify) | Profile | owner |
| Username | vicky.y2165@example.com | Active | <input checked="" type="checkbox"/> |
| Nickname | Vicky | Marketing User | <input type="checkbox"/> |
| Title | | Offline User | <input type="checkbox"/> |
| Company | | Knowledge User | <input type="checkbox"/> |
| Department | | Flow User | <input type="checkbox"/> |
| Division | | Service Cloud User | <input type="checkbox"/> |
| Address | | Site.com Contributor User | <input type="checkbox"/> |
| Time Zone | (GMT+05:30) India Standard Time (Asia/Kolkata) | Site.com Publisher User | <input type="checkbox"/> |
| Locale | English (India) | WDC User | <input type="checkbox"/> |
| Language | English | Mobile Push Registrations | View |

Activity 2: Creating Another Users

- Go to Setup → type "Users" in the quick find box → select Users → click New User.
- Fill in the fields:
- First Name: ram
- Last Name: ram
- Alias: rram

- Email ID: sravanthivelisella@gmail.com
- Username: ram.ram21@example.com
- Nickname: Ram
- Role: Employer
- User License: Salesforce Platform
- Profile: Standard Platform User
- Save it.

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

User Detail

| Name | ram ram | Role | employer |
|------------|---|---------------------------|-------------------------------------|
| Alias | rram | User License | Salesforce Platform |
| Email | sravanthivelisella@gmail.com [Verify] | Profile | Standard Platform User |
| Username | ram.ram21@example.com | Active | <input checked="" type="checkbox"/> |
| Nickname | Ram | Marketing User | <input type="checkbox"/> |
| Title | | Offline User | <input type="checkbox"/> |
| Company | | Knowledge User | <input type="checkbox"/> |
| Department | | Flow User | <input type="checkbox"/> |
| Division | | Service Cloud User | <input type="checkbox"/> |
| Address | | Site.com Contributor User | <input type="checkbox"/> |
| Time Zone | (GMT+05:30) India Standard Time (Asia/Kolkata) | Site.com Publisher User | <input type="checkbox"/> |
| Locale | English (India) | WDC User | <input type="checkbox"/> |
| Language | English | View Registrations | View |

User Detail Fields (Visible)

- Name: ram ram
- Alias: rram
- Email: sravanthivelisella@gmail.com [Verify]
- Username: ram.ram21@example.com
- Nickname: Ram
- Title:
- Company:
- Department:
- Division:
- Address:
- Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale: English (India)
- Language: English

User Detail Fields (Hidden)

- Role: employer
- User License: Salesforce Platform
- Profile: Standard Platform User
- Active:
- Marketing User:
- Offline User:
- Knowledge User:
- Flow User:
- Service Cloud User:
- Site.com Contributor User:
- Site.com Publisher User:
- WDC User:
- View Registrations: [View](#)

- Go to Setup → type "Users" in the quick find box → select Users → click New User.
- Fill in the fields:
 - First Name: ragu
 - Last Name: raj
 - Alias: rraj
 - Email ID: sravanthivelisella@gmail.com
 - Username: ragu.r21aj@example.com
 - Nickname: Ragu
 - Role: Worker
 - User License: Salesforce Platform

- Profile: Standard Platform User
- Save it.

The screenshot shows the Salesforce Setup interface under the 'Users' section. On the left, there's a sidebar with links for Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, and a highlighted 'Users' section. The main content area is titled 'User Detail' for a user named 'ragu raj'. It shows fields for Name (ragu raj), Alias (rraj), Email (sravanthivelisella@gmail.com), and Role (worker). Other sections include 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Mobile Push Registrations', 'Data.com User Type', 'Accessibility Mode (Classic Only)', and 'Debug Mode'. A note at the bottom says 'Receive Approval Request Emails Only if I am an approver'.

The screenshot shows the 'All Users' page in the Salesforce Setup interface. The sidebar on the left is identical to the previous screenshot. The main content area is titled 'All Users' and displays a list of users. The columns include Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are Chatter Expert (Chatter), ragu_r21aj (worker), ram_ram (employer), Sravanthi_Velisella (System Administrator), User_Integration (Analytics Cloud Integration User), User_Security (Analytics Cloud Security User), and v_yicky (owner). There are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users' at the bottom of the list.

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

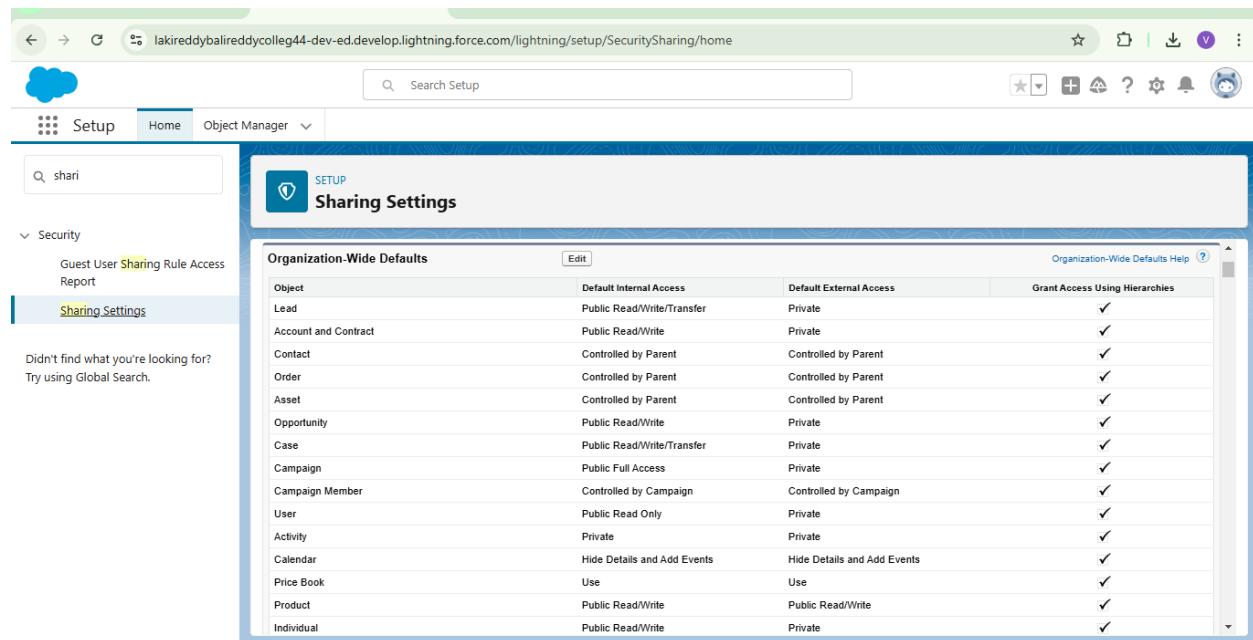
changing their profiles and are the recommended way to manage your users' permissions.

Activity 1: Creating OWD Setting

- Go to Setup → type “Sharing Settings” in quick search → Click Edit.
- Scroll down, change the default internal access to “Public Read-Only” for Rice Mill and Supplier objects.
- Click Save.

Extra Information:

By setting the Organization-Wide Defaults (OWD) to "Public Read-Only," every profile has its own access according to their profile. In our case, roles are created and assigned so that the owner can see employer and worker records, and the employer can see worker records.



The screenshot shows the Salesforce Sharing Settings page. The URL in the browser is lakireddybalireddycollege44-dev-ed.lightning.force.com/lightning/setup/SecuritySharing/home. The page title is "Sharing Settings". On the left, there's a sidebar with "Search Setup" and sections for "Security", "Guest User", "Sharing Rule Access Report", and "Sharing Settings" (which is selected). A message at the bottom says "Didn't find what you're looking for? Try using Global Search." The main content area displays a table titled "Organization-Wide Defaults" with columns: Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. The table lists various Salesforce objects with their respective sharing settings.

| 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 | ✓ |
| Opportunity | Public Read/Write | Private | ✓ |
| Case | Public Read/Write/Transfer | Private | ✓ |
| Campaign | Public Full Access | Private | ✓ |
| Campaign Member | Controlled by Campaign | Controlled by Campaign | ✓ |
| User | Public Read Only | Private | ✓ |
| Activity | Private | Private | ✓ |
| Calendar | Hide Details and Add Events | Hide Details and Add Events | ✓ |
| Price Book | Use | Use | ✓ |
| Product | Public Read/Write | Public Read/Write | ✓ |
| Individual | Public Read/Write | Private | ✓ |

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. Salesforce.com provides a powerful suite of analytic tools to help you organize, view, and analyze your data.

Activity 1: Create Report

- Go to the app → click on the Reports tab.
- Click New Report.
- Select for Report Type, search for “Rice Mill with Consumers”, click on it, and click Start Report.
- The outline pane is opened already, select the fields that are mentioned below in the Column section:
 - Consumer Name
 - Rice Type
 - Rice Price/kg
 - Mode of Payment
 - Amount Paid
 - Remove the unnecessary fields.
- Select the field that is mentioned below in the Group Rows section:
 - Rice Taken by Shops
 - Click Save and Run .
- Save the report as “Range of Amount per Day”.
- Save it.

Reports
Created by Me

| Report Name | Description | Folder | Created By | Created On | Subscribed |
|-------------------------|------------------------|---------------------|---------------------|-------------------|------------|
| range of amount per day | estimated rice per day | Velisella Sravanthi | Velisella Sravanthi | 3/1/2025, 5:33 pm | ✓ |

Report: rice mills with consumers
range of amount per day

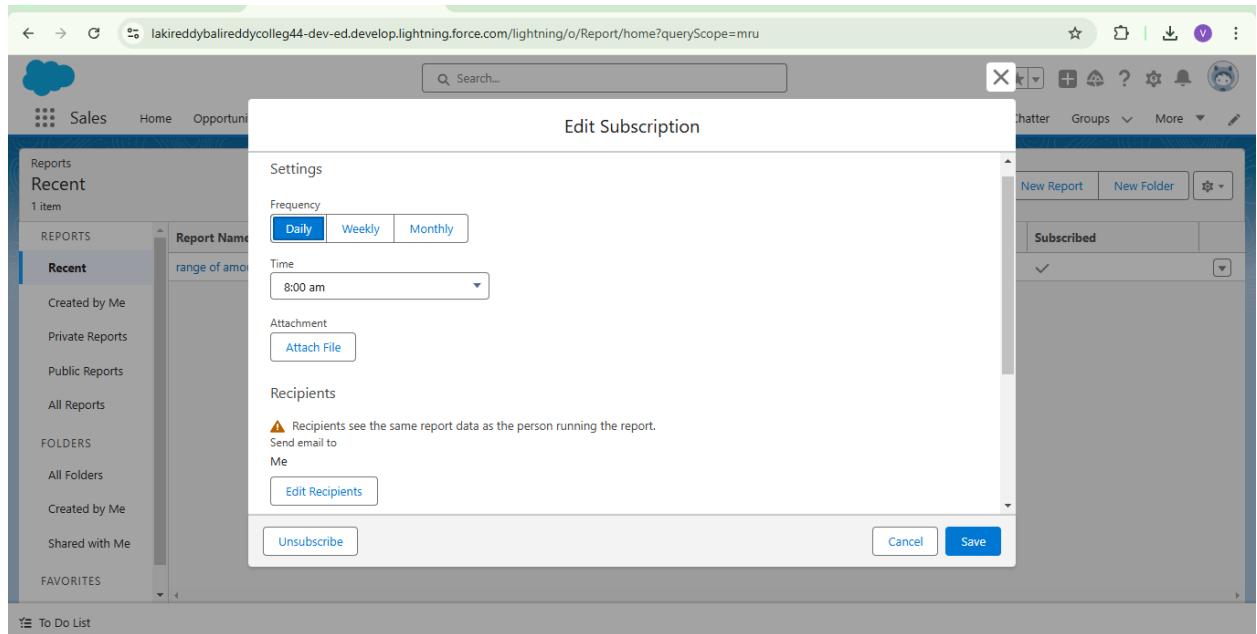
| Total Records | Total rice price/kg | Total Amount Paid | | | | | |
|-----------------------|-------------------------------------|-------------------|-------------------------------------|-----------------|-------------------------------------|-------------|-------------------------------------|
| 13 | 320 | 7,943.00 | | | | | |
| Rice taken by shops ↑ | | | | | | | |
| | Consumer Name | Rice type | rice price/kg | Mode of payment | | | |
| □ 12 (2) | Chinna V | 1.basmati | 19 | UPI | | | |
| | Ram V | 2.normal rice | 30 | Cash | | | |
| Subtotal | | | 49 | 588.00 | | | |
| □ 15 (2) | Vamsi G | 1.basmati | 10 | Credit card | | | |
| | Bestie K | 2.normal rice | 34 | Debit card | | | |
| Subtotal | | | 44 | 660.00 | | | |
| □ 18 (1) | Krishna D | 2.normal rice | 27 | Net banking | | | |
| Subtotal | | | 27 | 486.00 | | | |
| □ 20 (1) | Gayathri M | 1.basmati | 30 | Net banking | | | |
| Subtotal | | | 30 | 600.00 | | | |
| □ 21 (1) | Abdul Sameer | 1 basmati | 12 | Cash | | | |
| Subtotal | | | 12 | 252.00 | | | |
| □ 23 (1) | Nivedha Isha | 1.basmati | 9 | Credit card | | | |
| Row Counts | <input checked="" type="checkbox"/> | Detail Rows | <input checked="" type="checkbox"/> | Subtotals | <input checked="" type="checkbox"/> | Grand Total | <input checked="" type="checkbox"/> |

Activity 2: Sharing Report to Owner

- Click on the report to open it.
- Click the Edit dropdown menu and select the Subscribe option.
- After selecting to run the report as "Another Person," select your personal

account or the person you want to send the email to.

- Click Save.
- Note: The owner gets a daily email notification of the Rice Mill report so that they can see all data remotely.



Activity 3: Create a Report Folder

Steps to Create a Report Folder:

- Click on the App Launcher and search for "Reports".
- Double-click on "Reports". The "Reports tab" will be auto-populated in the navigation bar.
- Click on the "Reports" tab, then click on New Folder.
- Give the Folder Label as "Estimated Rice per Day". The Folder Unique Name will be auto-populated.
- Click Save.

Moving a Report to the New Folder:

- Navigate to the App Launcher and click on Reports.
- Click All Reports.
- Select the "Range of Amount per Day" report from the dropdown menu.

- Click Move.
- Select the "Estimated Rice per Day" folder and click Select.

The screenshot shows the Salesforce Reports All Folders page. On the left, there's a sidebar with categories: REPORTS, FOLDERS, and FAVORITES. Under REPORTS, there are links for Recent, Created by Me, Private Reports, Public Reports, and All Reports. Under FOLDERS, 'All Folders' is selected, showing sub-links for Created by Me and Shared with Me. Under FAVORITES, there's a link for To Do List. The main area displays a table of reports and folders. One folder, 'estimated rice per day', is highlighted with a blue border. The table columns include Name, Created By, Created On, Last Modified By, and Last Modified Date.

| Name | Created By | Created On | Last Modified By | Last Modified Date |
|---|---------------------|--------------------|---------------------|--------------------|
| Einstein Bot Reports | Automated Process | 6/11/2024, 8:05 pm | Automated Process | 6/11/2024, 8:05 pm |
| Einstein Bot Reports Spring '23 | Automated Process | 6/11/2024, 8:05 pm | Automated Process | 6/11/2024, 8:05 pm |
| Einstein Bot Reports Summer '23 | Automated Process | 6/11/2024, 8:05 pm | Automated Process | 6/11/2024, 8:05 pm |
| Einstein Bot Reports Summer '22 | Automated Process | 6/11/2024, 8:05 pm | Automated Process | 6/11/2024, 8:05 pm |
| Einstein Bot Reports Winter '23 | Automated Process | 6/11/2024, 8:05 pm | Automated Process | 6/11/2024, 8:05 pm |
| Enablement Dashboard Reports Spring '24 | Automated Process | 6/11/2024, 8:05 pm | Automated Process | 6/11/2024, 8:05 pm |
| Enablement Dashboard Reports Summer '24 | Automated Process | 6/11/2024, 8:05 pm | Automated Process | 6/11/2024, 8:05 pm |
| estimated rice per day | Velisella Sravanthi | 3/1/2025, 5:39 pm | Velisella Sravanthi | 3/1/2025, 5:39 pm |

Overall Reports (Range of amount per day)

The screenshot shows the Salesforce Report: rice mills with consumers range of amount per day page. At the top, it displays the report title and some summary statistics: Total Records (13), Total rice price/kg (320), and Total Amount Paid (7,943.00). Below this is a table with columns: Rice taken by shops, Consumer Name, Rice type, rice price/kg, Mode of payment, and Amount Paid. The table shows data for various consumers and their rice purchases, with subtotals for different groups. At the bottom of the table, there are checkboxes for Row Counts, Detail Rows, Subtotals, and Grand Total.

| Rice taken by shops | Consumer Name | Rice type | rice price/kg | Mode of payment | Amount Paid |
|---------------------|---------------|---------------|---------------|-----------------|-------------|
| 12 (2) | Chinna V | 1.basmati | 19 | UPI | 228.00 |
| | Ram V | 2.normal rice | 30 | Cash | 360.00 |
| Subtotal | | | 49 | | 588.00 |
| 15 (2) | Vamsi G | 1.basmati | 10 | Credit card | 150.00 |
| | Bestie K | 2.normal rice | 34 | Debit card | 510.00 |
| Subtotal | | | 44 | | 660.00 |
| 18 (1) | Krishna D | 2.normal rice | 27 | Net banking | 486.00 |
| Subtotal | | | 27 | | 486.00 |
| 20 (1) | Gayathri M | 1.basmati | 30 | Net banking | 600.00 |
| Subtotal | | | 30 | | 600.00 |
| Grand Total | | | | | 2632.00 |

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

Steps to Create a Dashboard Folder:

- Click on the App Launcher and search for "Dashboard".
- Click on the Dashboard tab.
- Click New Folder.
- Give the Folder Label as "Amount Data Dashboard".
- Folder Unique Name will be auto-populated.
- Click Save.

| Name | Created By | Created On | Last Modified By | Last Modified Date |
|---------------------------------|---------------------|--------------------|---------------------|--------------------|
| amount data dashboard | Velisella Sravanthi | 3/1/2025, 5:43 pm | Velisella Sravanthi | 3/1/2025, 5:43 pm |
| Enablement Dashboard Spring '24 | Automated Process | 6/11/2024, 8:05 pm | Automated Process | 6/11/2024, 8:05 pm |
| Enablement Dashboard Summer '24 | Automated Process | 6/11/2024, 8:05 pm | Automated Process | 6/11/2024, 8:05 pm |

Activity 2: Create Dashboard

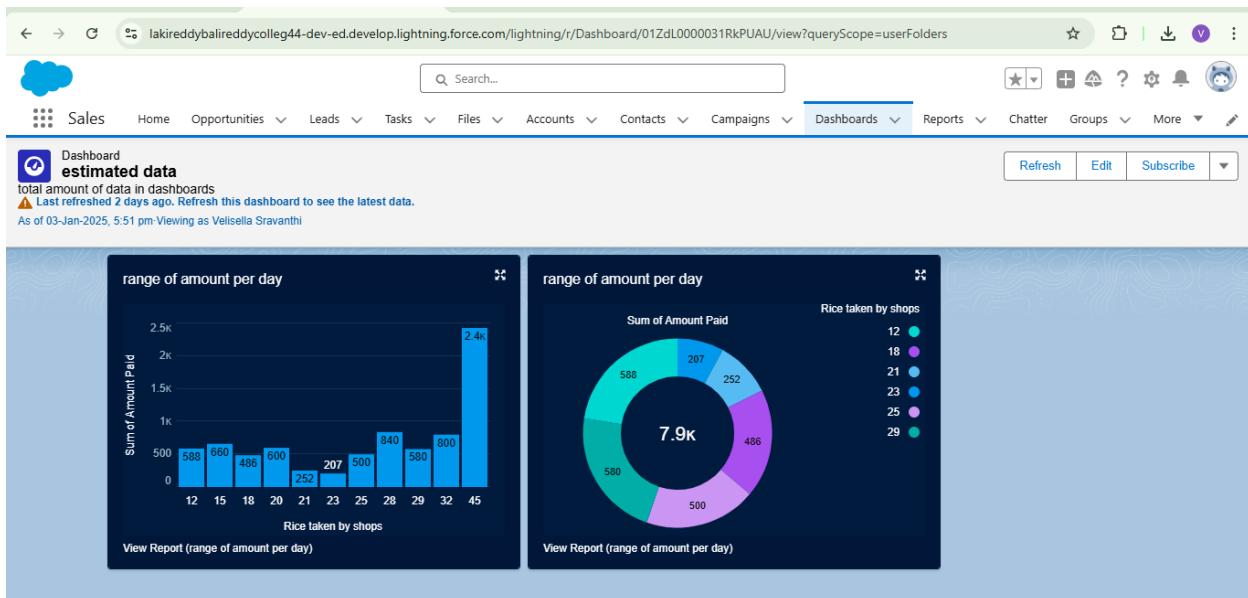
- Go to the App → click on the Dashboards tab.
- Give a Name and select the folder that was created, and click Create.
- Select Add Component.
- Select a Report and click Select.

First Component Details:

- 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

Second Component Details:

- Select Add Component with the same steps as above.
- Display as: Donut Chart
- Sort by: Sum of Amount
- Title: Range of Amount per Day
- Component Theme: Dark



Milestone 13 - 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

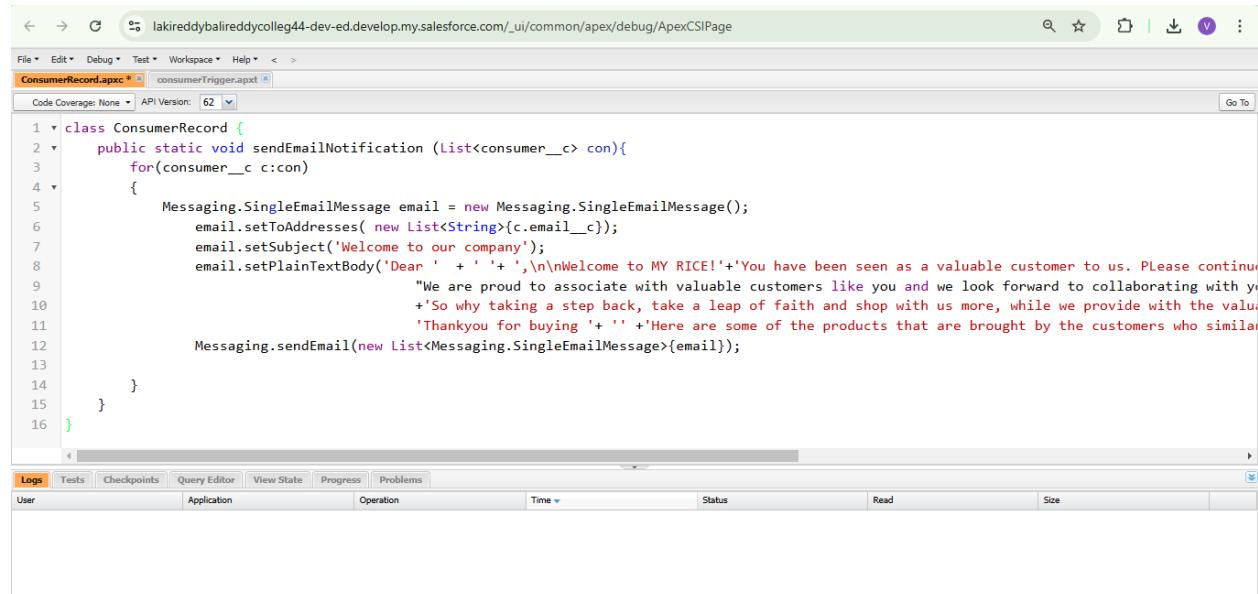
and acts like database stored procedures, Apex enables developers to add business logic to most system events, including button clicks, related record updates, and Visualforce pages. Apex code can be initiated by Web service requests and from triggers on objects.

Activity 1: Creating an Apex Class(ConsumerRecord)

Steps to Create

- Login to the Salesforce account and navigate to the gear account in the top right corner.
- Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.
- Then you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Class.
- Enter the name of the class(ConsumerRecord) to create a new class file.

Code Snippet :



The screenshot shows the Salesforce Developer Console interface. The title bar indicates the URL is lakireddybalireddycolleg44-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The main area displays the code for the ConsumerRecord class:

```
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\nWelcome to MY RICE!'+'You have been seen as a valuable customer to us. Please continue
9                         "We are proud to associate with valuable customers like you and we look forward to collaborating with yo
10                         +'So why taking a step back, take a leap of faith and shop with us more, while we provide with the value
11                         'Thankyou for buying ' + ' '+ 'Here are some of the products that are brought by the customers who similar
12             Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
13
14         }
15     }
16 }
```

Below the code editor, there is a toolbar with tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The Logs tab is currently selected. A status bar at the bottom shows the user information and application details.

Activity 2 :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.

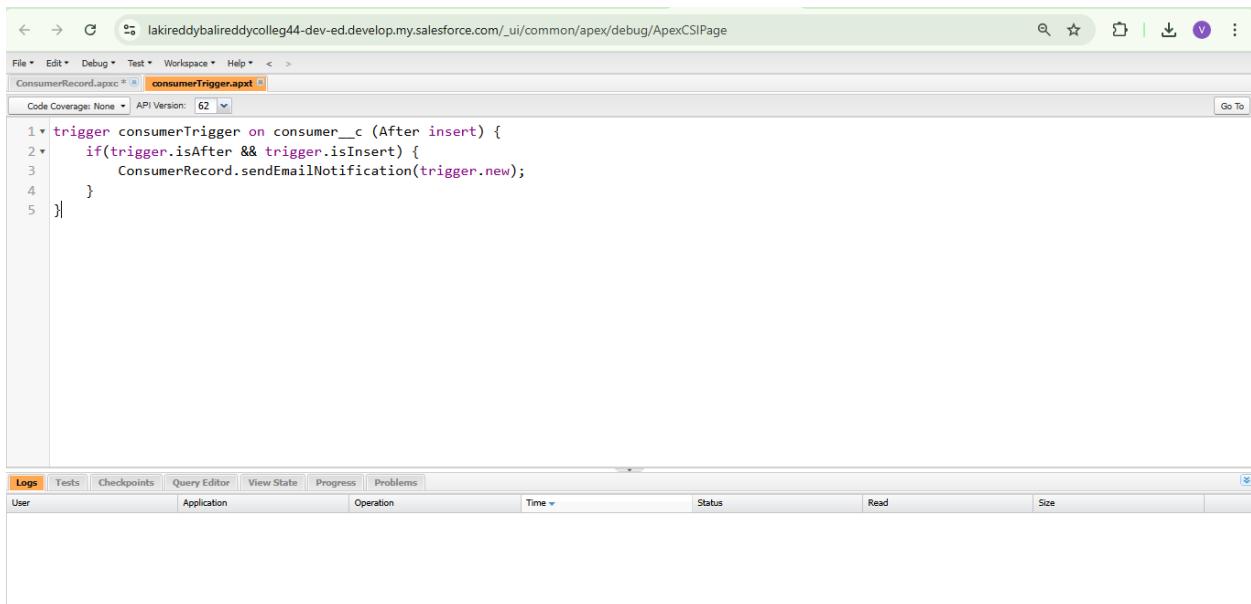
Click on developer console and you will be navigated to a new console window.
Click on the File menu in the toolbar, and click on new? Trigger.
Enter the trigger name and the object to be triggered.

Syntax For creating trigger :

The syntax for creating trigger is :

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

Trigger code:



The screenshot shows the Salesforce developer console interface. The URL in the address bar is "lakireddybalireddycolleg44-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage". The top navigation bar includes File, Edit, Debug, Test, Workspace, Help, and a search bar. Below the navigation is a toolbar with icons for search, star, refresh, download, and more. The main area displays an Apex trigger named "consumerTrigger.apxt". The code is as follows:

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

Below the code editor, there are tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The Logs tab is selected. At the bottom, there is a table with columns: User, Application, Operation, Time, Status, Read, and Size.