

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.

RollupSummary 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.
- IsBlank 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 : Swapna
- Last Name: Thalla

- Email: swapnathalla333@gmail.com
- Role : Developer
- Company: Lakireddy Bali Reddy College of Engineering
- Country : India
- Postal Code: 520015
- Username : ricemill@skill.wallet

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*
Swapna	Thalla
Email*	
swapnathalla333@gmail.com	
Role*	
Developer	
Company*	
Lakireddy Bali Reddy College of Engineering	
Country/Region*	

The screenshot shows the Salesforce Developer Edition Signup page. The form fields are as follows:

- Company***: Lakireddy Bali Reddy College of Engineering
- Country/Region***: India
- State/Province***: Andhra Pradesh
- Postal Code***: 520015
- Username***: ricemill@skill.wallet

Below the username field, there is a note: "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.](#)" There is also a checkbox for agreeing to the [Main Services Agreement – Developer Services](#) and [Salesforce Program Agreement](#).

At the bottom of the form, there are two checkboxes:

- 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.

Below the checkboxes, there is a note: "By registering, you confirm that you agree to the processing of your personal data by Salesforce as described in the [Privacy Statement](#)".

A large blue "Sign me Up" button is centered at the bottom of the form. To the right of the button, a link says "Already have a Salesforce Developer Environment?"

Activity 2: Account Activation

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

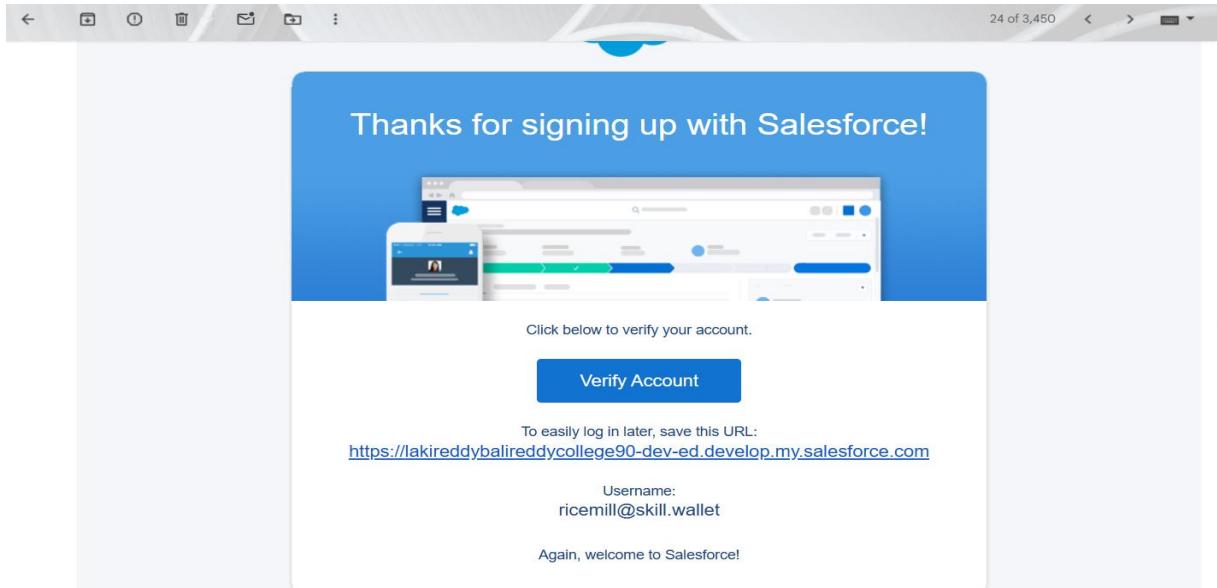
Check Your Email

- 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 CustomObject defining page:
- Enter the Label Name and Plural Label Name
- Click on AllowReports
- Click on Allow Search
- Click on Save

The screenshot shows the 'New Custom Object' page in the Salesforce Setup. The 'Label' field is set to 'Account' and the 'Plural Label' field is set to 'Accounts'. The 'Object Name' field is also set to 'Account'. There are sections for 'Context-Sensitive Help Setting' (with options for standard help or Visualforce page), 'Record Name' (set to 'Account Name'), and 'Data Type' (set to 'Text'). The 'Optional Features' section includes a checkbox for 'Allow Reports'.

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 ObjectManager.
- Click on Create.
- Click on Custom Object.

Define the Custom Object:

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

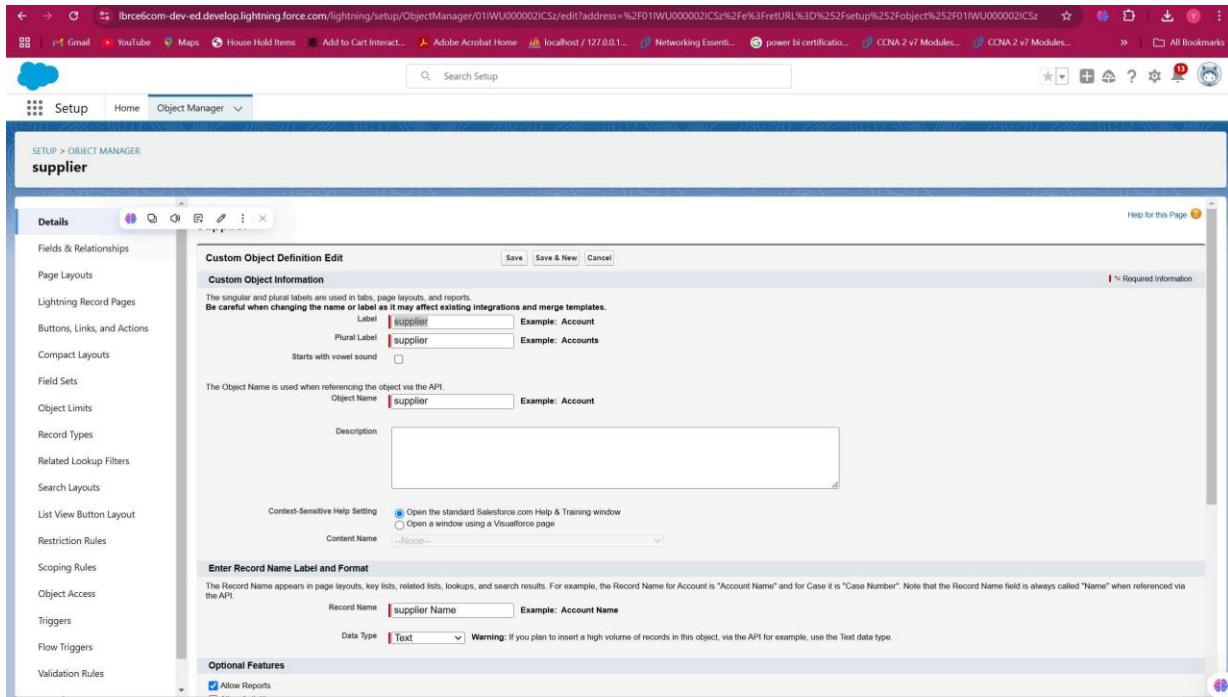
Set Additional Options:

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

Save the Custom Object:

- Click on Save.+

The screenshot shows the Salesforce Setup interface for managing objects. The top navigation bar includes links for Home, Object Manager, and a search bar labeled 'Search Setup'. The main content area is titled 'SETUP > OBJECT MANAGER' and shows the 'supplier' object details. On the left, a sidebar lists various configuration tabs such as Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, and Validation Rules. The right side of the screen displays the 'Details' tab for the 'supplier' object, which includes fields for API Name ('supplier_c'), Singular Label ('supplier'), Plural Label ('supplier'), Description (''), Enable Reports (checked), Track Activities (unchecked), Track Field History (checked), Deployment Status ('Deployed'), and Help Settings ('Standard salesforce.com Help Window'). There are 'Edit' and 'Delete' buttons at the bottom right of the details section.



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.

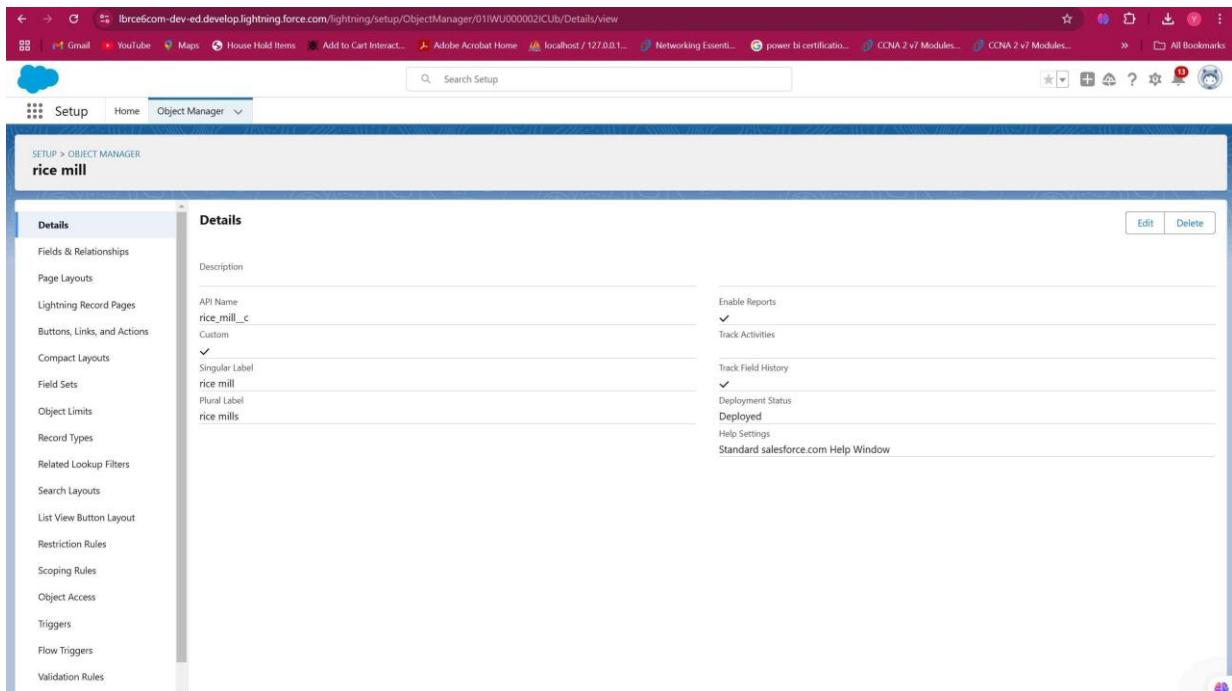
- Enter the Plural Label Name: Rice Mills.
- Enter the Record Name Label and Format:
- Record Name: Leave it blank.
- Data Type: Auto Number
- DisplayFormat: rice-{000}
- StartingNumber: 1

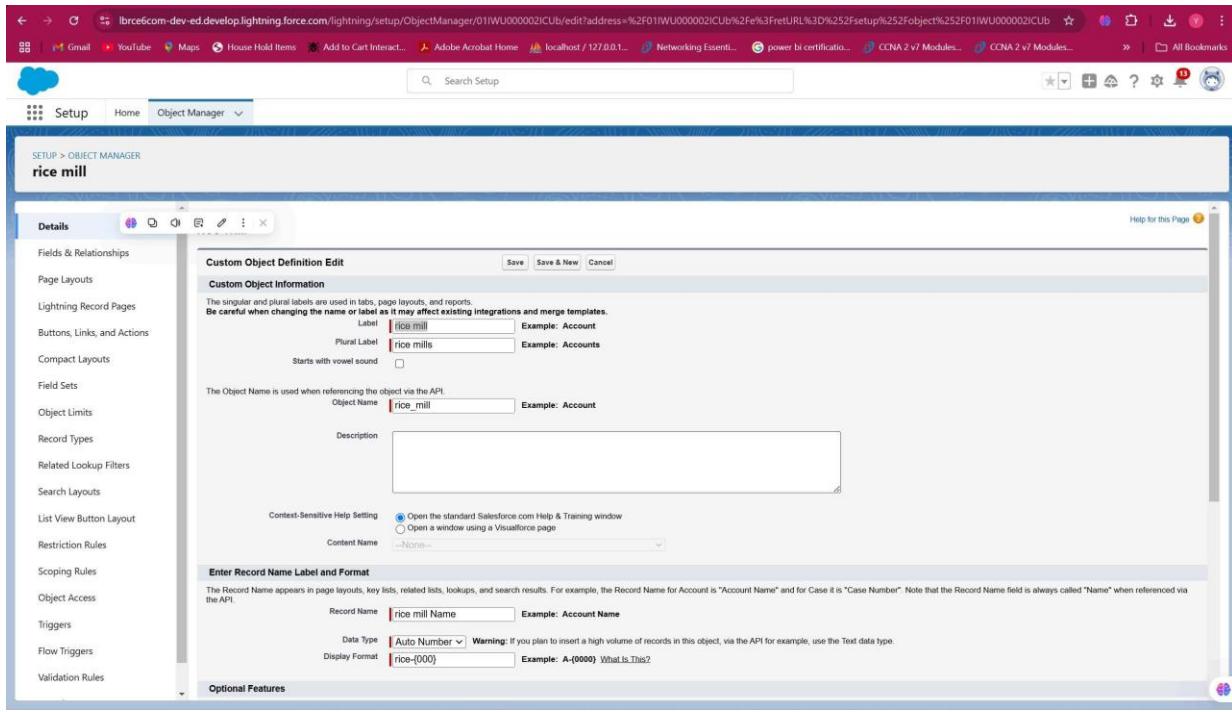
Set Additional Options:

- Click on **Allow Reports**.
- Click on **Track FieldHistory**.
- Click on **Allow Search**.

Save the Custom Object:

- Click on **Save**.





Activity 3: Create Consumer Object

To create a Consumer object in Salesforce, follow the same steps as mentioned in Activity2 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 ObjectManager.
- Click on Create.
- Click on Custom Object.

Define the Custom Object:

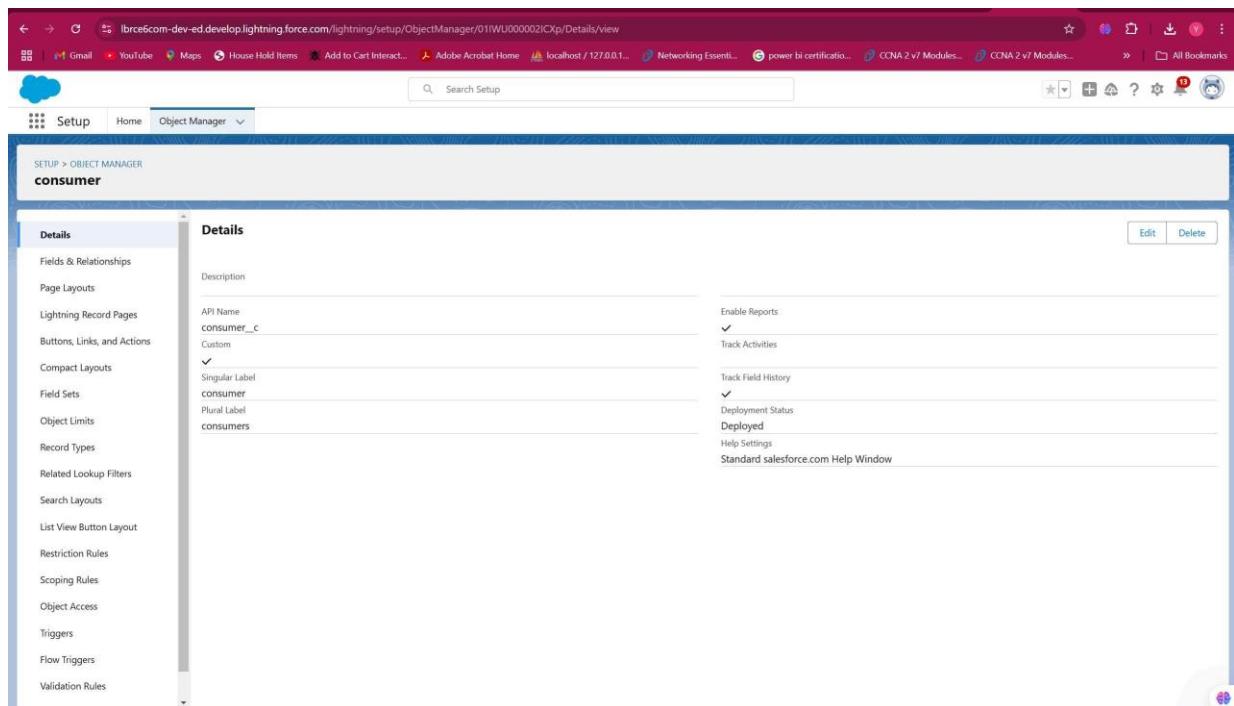
- Enter the Label Name: Consumer.
- Enter the Plural Label Name: Consumers.
- Enter the Record Name Label and Format:
- Record Name: Leave it blank.
- Data Type: Auto Number
- Display Format: consumers-{000}
- Starting Number: 1

Set Additional Options:

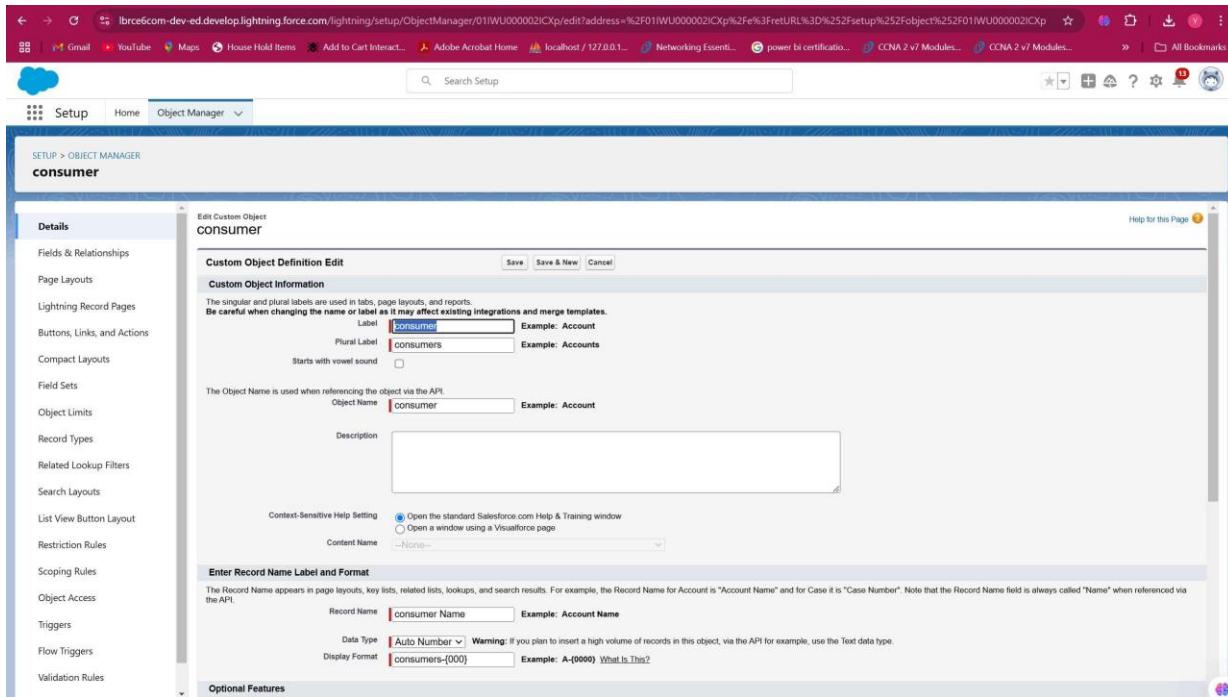
- Click on Allow Reports.
- Click on Track Field History.
- Click on Allow Search.

Save the Custom Object:

- Click on Save.



The screenshot shows the Salesforce Setup interface for managing objects. The top navigation bar includes links for Gmail, YouTube, Maps, House Hold Items, Add to Cart Interact..., Adobe Acrobat Home, localhost / 127.0.0.1..., Networking Essentials, power bi certification, CCNA 2 v7 Modules, CCNA 2 v7 Modules..., All Bookmarks, and a search bar labeled "Search Setup". Below the header, the main content area has a blue header bar with "SETUP > OBJECT MANAGER" and the object name "consumer". The main body is divided into two columns: "Details" on the left and "Fields & Relationships" on the right. The "Details" column contains fields for API Name ("consumer__c"), Singular Label ("consumer"), and Plural Label ("consumers"). The "Fields & Relationships" column contains sections for "Enable Reports" (checked), "Track Activities" (unchecked), "Track Field History" (checked), "Deployment Status" (set to "Deployed"), and "Help Settings" (set to "Standard salesforce.com Help Window"). On the far right of the "Details" column are "Edit" and "Delete" buttons. A vertical sidebar on the left lists various setup categories such as Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, and Validation Rules.



Activity 4: Create Rice Details Object

To create a 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 ObjectManager.
- 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.

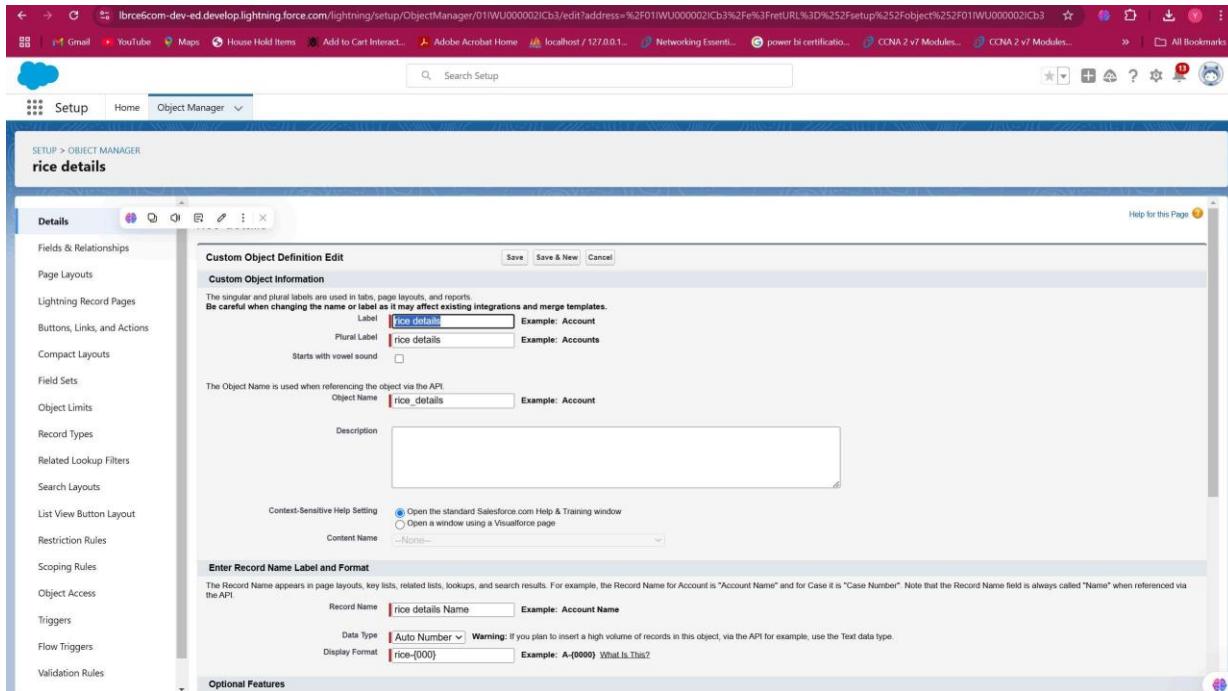
The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Gmail, YouTube, Maps, House Hold Items, Add to Cart Interact..., Adobe Acrobat Home, localhost / 127.0.0.1..., Networking Essential..., power bi certificatio..., CCNA 2 v7 Modules..., CCNA 2 v7 Modules..., and All Bookmarks. The main header says "SETUP > OBJECT MANAGER" and the object name is "rice details".

The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, and Validation Rules.

The main content area is titled "Details" and shows the following configuration:

- Description:** rice_details_c
- API Name:** rice_details_c
- Singular Label:** rice details
- Plural Label:** rice details
- Enable Reports:** checked
- Track Activities:** checked
- Track Field History:** checked
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

At the bottom right of the main content area are "Edit" and "Delete" buttons.



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.

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 ProfilesPage:

- Keep it as default.
- Click on Next.

Add to Custom App:

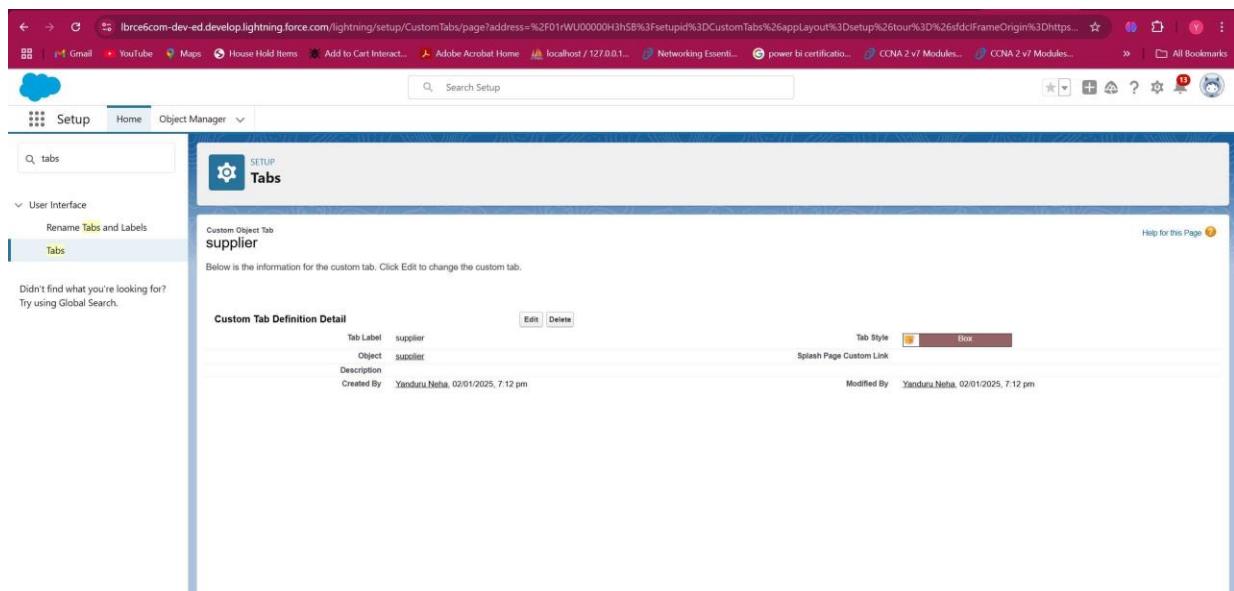
- Uncheck the IncludeTab checkbox.

Append Tab to Users' ExistingPersonal Customizations:

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

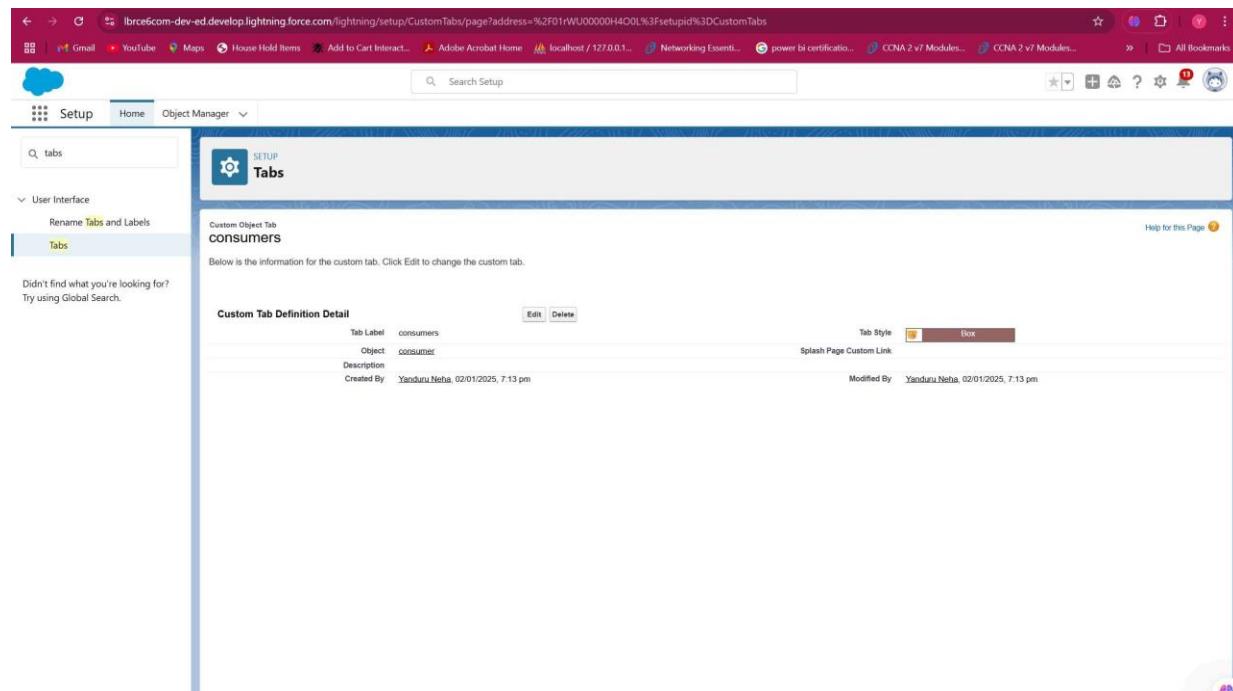
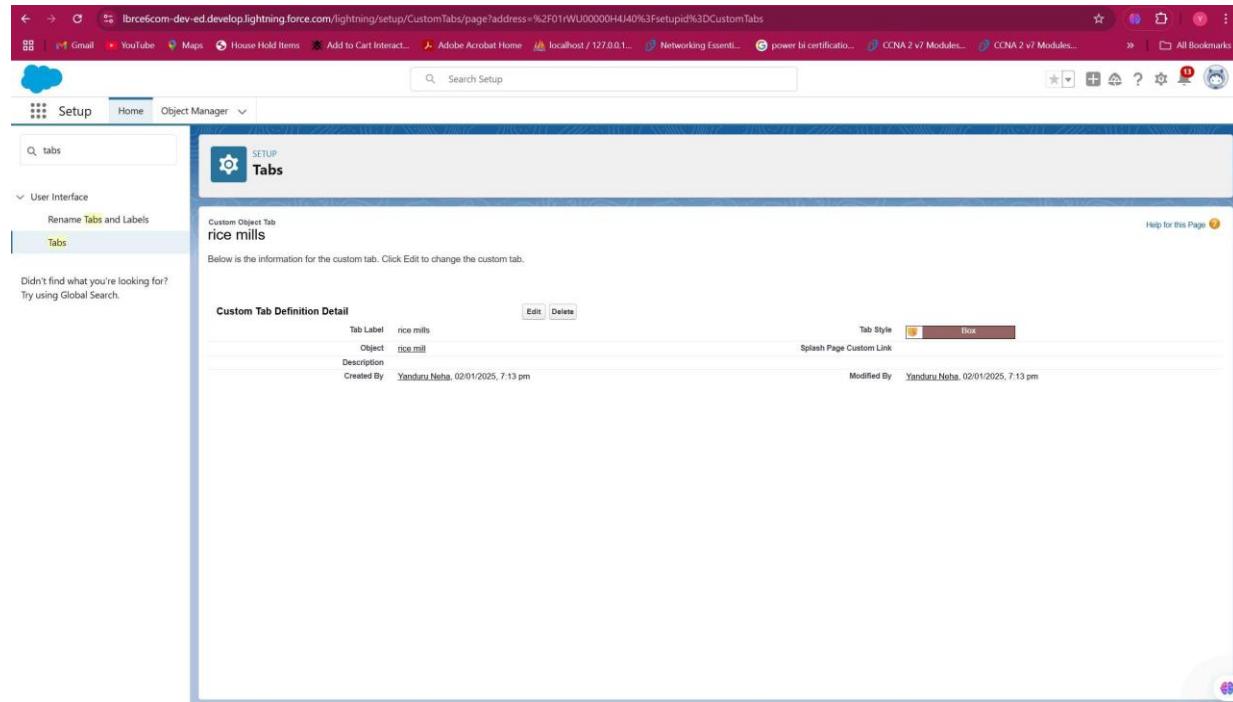
Save the Custom Tab:

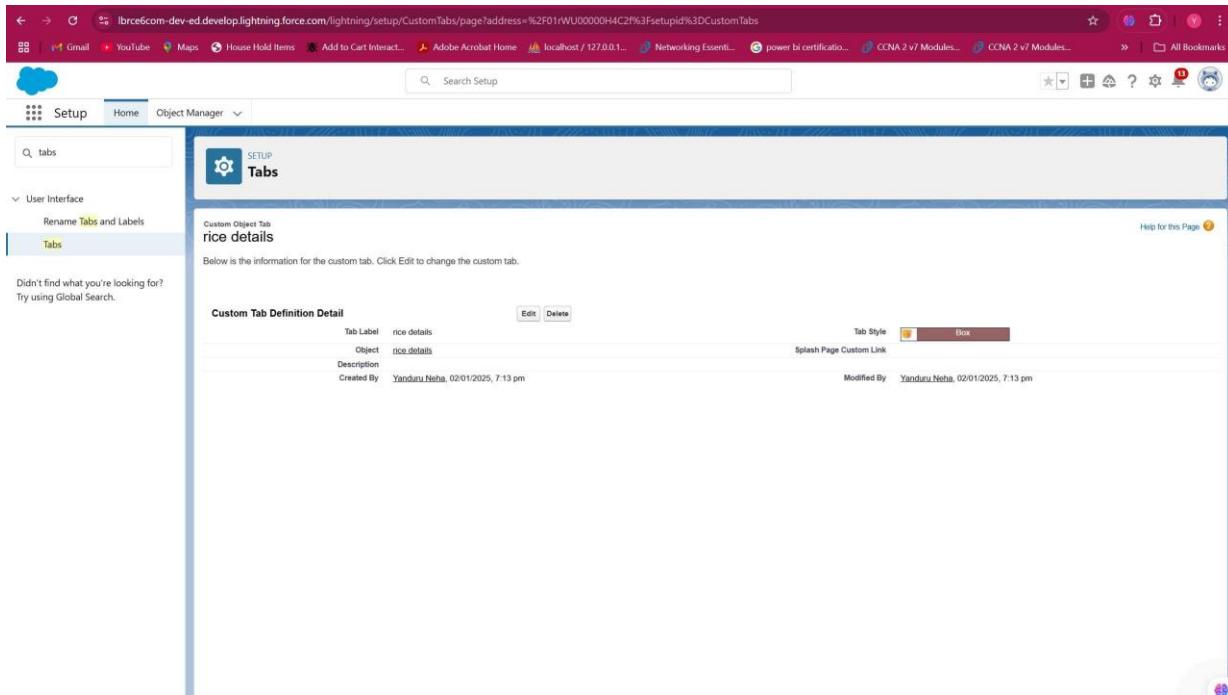
- Click on Save.



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.





Milestone 4 - The Lightning App

An app is a collection of itemsthat work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other itemsall 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 LightningApp

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 searchbar.

- Click on the arrow button to add the profile.
- Click Save & Finish.

Screenshot of the Lightning Experience App Manager page:

The URL is lrbce6com-dev-ed.lightning.force.com/lightning/setup/NavigationMenus/home

The page title is "Lightning Experience App Manager".

The sidebar shows "App Manager" selected under "External Client Apps".

The main content area displays a table of apps:

App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visible i...
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	21/12/2024, 10:07 pm	Lightning	✓
Community	Community	Salesforce CRM Communities	21/12/2024, 10:07 pm	Classic	✓
Content	Content	Salesforce CRM Content	21/12/2024, 10:07 pm	Classic	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	21/12/2024, 10:07 pm	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	21/12/2024, 10:07 pm	Lightning	✓
Hive	hive		21/12/2024, 10:07 pm	Community	✓
Hive App	Hive App		22/12/2024, 8:38 pm	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	21/12/2024, 10:07 pm	Lightning	✓
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	21/12/2024, 10:07 pm	Classic	✓
MY RICE	MY_RICE		04/01/2025, 6:14 pm	Lightning	✓
Platform	Platform	The fundamental Lightning Platform	21/12/2024, 10:07 pm	Classic	✓
Queue Management	QueueManagement	Create and manage queues for your business.	21/12/2024, 10:07 pm	Lightning	✓
Sales	Sales	The world's most popular sales force automation (SFA) solution	21/12/2024, 10:07 pm	Classic	✓
Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	21/12/2024, 10:07 pm	Lightning	✓
Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	21/12/2024, 10:07 pm	Lightning	✓
Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	21/12/2024, 10:11 pm	Classic	✓
Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	21/12/2024, 10:07 pm	Lightning	✓
Service	Service	Manage customer service with accounts, contacts, cases, and more	21/12/2024, 10:07 pm	Classic	✓
Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across custo...	21/12/2024, 10:07 pm	Lightning	✓
Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com applicatio...	21/12/2024, 10:07 pm	Classic	✓

Screenshot of the Lightning App Builder page:

The URL is <https://lrbce6com-dev-ed.lightning.force.com/visualEditor/appBuilder/app?id=02uWU00000BS39eYAC&retUrl=https%3A%2F%2Flrbce6com-dev-ed.lightning.force.com%2Flightning%2Fsetup%2FNavigationMenus%2Fhome>

The page title is "App Settings".

The sidebar shows "App Details & Branding" selected under "App Options".

The main content area shows the "App Details & Branding" section:

App Details

- *App Name: MY RICE
- *Developer Name: MY_RICE
- Description: Enter a description...

App Branding

- Image: A small placeholder image for the app icon.
- Primary Color Hex Value: #0070D2

Org Theme Options

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

App Launcher Preview

A preview of the app icon and name "MY RICE" in the app launcher.

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

1. Standard Fields
2. 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:

- a. Created By
- b. Owner
- c. Last Modified
- d. 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. On the left, a sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Fields & Relationships. The main area displays the 'rice distributed' field for the 'rice details' object. The field is defined as a custom field with the following details:

- Field Label:** rice distributed
- Field Name:** rice_distributed
- API Name:** rice_distributed_c
- Description:** (empty)
- Data Sensitivity Level:** (empty)
- Compliance Categorization:** (empty)
- Created By:** Yanduru Neha, 02/01/2025, 7:21 pm
- Modified By:** Yanduru Neha, 02/01/2025, 7:21 pm

The 'General Options' section includes checkboxes for Required, Unique, External ID, AI Prediction, and Default Value. The 'Number Options' section shows Length: 5 and Decimal Places: 0. The 'Validation Rules' section indicates 'No validation rules defined.'

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 a 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 relatedobject 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 1to 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 Save.

lbrc6com-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IWU000002ICb3/FieldsAndRelationships/00NWU0000077c69/view

Setup Home Object Manager Search Setup

SETUP > OBJECT MANAGER
rice details

rice details Custom Field supplier Back to rice details Validation Rules [?]

Custom Field Definition Detail

Field Information

Field Label	supplier	Object Name	rice_details
Field Name	supplier	Data Type	Master-Detail
API Name	supplier_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Yanduru Neha, 02/01/2025, 7:23 pm	Modified By	Yanduru Neha, 02/01/2025, 7:23 pm

Master-Detail Options

Related To	supplier	Child Relationship Name	rice_details
Related List Label	rice details		
Sharing Setting	Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		
Reparentable Master Detail	<input type="checkbox"/>		

Lookup Filter

No lookup filters defined.

Validation Rules

No validation rules defined.

[New](#) Validation Rules Help [?]

Always show me ▾ more records per related list

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lbrc6com-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IWU000002ICb3/FieldsAndRelationships/00NWU0000077c69/view

Setup Home Object Manager Search Setup

SETUP > OBJECT MANAGER
rice details

rice details Custom Field rice mill 1(one) Back to rice details Validation Rules [?]

Custom Field Definition Detail

Field Information

Field Label	rice mill 1(one)	Object Name	rice_details
Field Name	rice_mill_1_one	Data Type	Master-Detail
API Name	rice_mill_1_one_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Yanduru Neha, 02/01/2025, 7:24 pm	Modified By	Yanduru Neha, 02/01/2025, 7:24 pm

Master-Detail Options

Related To	rice_mill	Child Relationship Name	rice_details
Related List Label	rice details		
Sharing Setting	Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		
Reparentable Master Detail	<input type="checkbox"/>		

Lookup Filter

No lookup filters defined.

Validation Rules

No validation rules defined.

[New](#) Validation Rules Help [?]

Always show me ▾ more records per related list

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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.

Related 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.

Activity 4: Creating the Roll-up Summary

A roll-upsummary field is a field that summarizes data from a child object to a parent object that shares a master- detail 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 Master-Detail relationship:

Navigate to Object Manager:

- Go to the setup page.
- Click on Object Manager.
- Type the object name Supplier in the searchbar.
- 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-upSummary for Supplier:

- Select the summarized object as Rice Details.
- Select the roll-up type as SUM.
- Select the field to aggregateas 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 created for the 'supplier' object. The field is of type 'Roll-up Summary' and is aggregated from the 'rice_details' object. The summary type is set to 'SUM'. Other details like Field Label, API Name, and Data Type are also visible.

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-upSummary 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 Setup interface for creating a custom field. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, and Record Types. The main content area shows a 'Custom Field Definition Detail' page for a field named 'rice distributed to shops' (API Name: rice_distributed_to_shops_c). The field is categorized under 'rice mill Custom Field'. A 'Roll-Up Summary Options' section is visible, indicating it is summarized from the 'rice details' object using the 'rice distributed' field, with a summary type set to 'SUM'.

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-upSummary 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 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 'rice mill' under 'Custom Field Definition Detail'. The 'rice taken' field is defined with the following properties:

Field Information	Value
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	Yanduru.Neha. 02/01/2025, 7:39 pm
Modified By	Yanduru.Neha. 02/01/2025, 7:39 pm

Roll-Up Summary Options

Setting	Value
Data Type	Roll-Up Summary
Summarized Object	consumer
Field to Aggregate	consumer:rice taken by shops in kgs
Filter Criteria	
Summary Type	SUM

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.

The screenshot shows the Salesforce Object Manager interface. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Fields & Relationships. The main content area is titled 'rice details Custom Field supplier'. It shows the 'Custom Field Definition Detail' page with the following details:

- Field Information:**
 - Field Label: supplier
 - Field Name: supplier
 - API Name: supplier_c
 - Description: (empty)
 - Help Text: (empty)
 - Data Owner: (empty)
 - Field Usage: (empty)
 - Data Sensitivity Level: (empty)
 - Compliance Categorization: (empty)
- Master-Detail Options:**
 - Related To: rice details
 - Related List Label: rice details
 - Sharing Setting: Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
 - Representable Master Detail: (checkbox)
- Validation Rules:** No validation rules defined.

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. A custom field named 'rice price/kg' has been created for the 'rice mill' object. The field is defined as a Number type with a length of 5. The page displays various configuration tabs such as Fields & Relationships, Page Layouts, and Validation Rules.

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:

SETUP > OBJECT MANAGER
consumer

consumer Custom Field
First name
Back to consumer

Custom Field Definition Detail

Field Information

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: Yanduru Neha, 02/01/2025, 7:49 pm Modified By: Yanduru Neha, 02/01/2025, 7:49 pm

General Options

Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
Case Sensitive	<input type="checkbox"/>
External ID	<input type="checkbox"/>
Default Value	

Text Options

Length	30
--------	----

Validation Rules

No validation rules defined.

Help for this Page

Create New Field For Last Name:

SETUP > OBJECT MANAGER
consumer

consumer Custom Field
Last name
Back to consumer

Custom Field Definition Detail

Field Information

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

Created By: Yanduru Neha, 02/01/2025, 7:50 pm Modified By: Yanduru Neha, 02/01/2025, 7:50 pm

General Options

Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
Case Sensitive	<input type="checkbox"/>
External ID	<input type="checkbox"/>
Default Value	

Text Options

Length	50
--------	----

Validation Rules

No validation rules defined.

Validation Rules Help

Create New Field For Email:

The screenshot shows the Salesforce Object Manager interface. A custom field named 'email' has been created for the 'consumer' object. The field is of type Email and is required. It was created by Yanduru Neha on 02/01/2025 at 7:51 pm.

Custom Field Definition Detail

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

General Options

Required	Unique	External ID	Default Value
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Validation Rules

No validation rules defined.

Create New Field For Rice Taken By Shops:

The screenshot shows the Salesforce Object Manager interface. A custom field named 'Rice taken by shops' has been created for the 'consumer' object. The field is of type Number and is required. It was created by Yanduru Neha on 02/01/2025 at 7:52 pm.

Custom Field Definition Detail

Field Information	Object Name	Data Type
Field Label: Rice taken by shops Field Name: Rice_taken_by_shops API Name: Rice_taken_by_shops_c Description: Help Text: Data Owner: Field Usage: Data Sensitivity Level: Compliance Categorization:	consumer	Number

General Options

Required	Unique	External ID	AI Prediction	Default Value
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Number Options

Length	Decimal Places
5	0

Validation Rules

No validation rules defined.

Create New Field For Rice Type:

Rice type

Custom Field Definition Detail

Field Information

- Field Label: Rice type
- Field Name: Rice_type
- API Name: Rice_type_c
- Description: Help Text, Data Owner, Field Usage
- Data Sensitivity Level: Compliance Categorization
- Created By: Yanduru.Neha, 02/01/2025, 7:53 pm
- Modified By: Yanduru.Neha, 02/01/2025, 7:53 pm

General Options

- Required:
- Default Value:

Picklist Options

- Restrict picklist to the values defined in the value set:
- Controlling Field: [New]

Picklist Values Used

Active and inactive picklist values: 2 (1,000 max)

Field Dependencies

No dependencies defined.

Create New Field For Phone Number:

Phone number

Custom Field Definition Detail

Field Information

- Field Label: Phone number
- Field Name: Phone_number
- API Name: Phone_number_c
- Description: Help Text, Data Owner, Field Usage
- Data Sensitivity Level: Compliance Categorization
- Created By: Yanduru.Neha, 02/01/2025, 7:50 pm
- Modified By: Yanduru.Neha, 02/01/2025, 7:50 pm

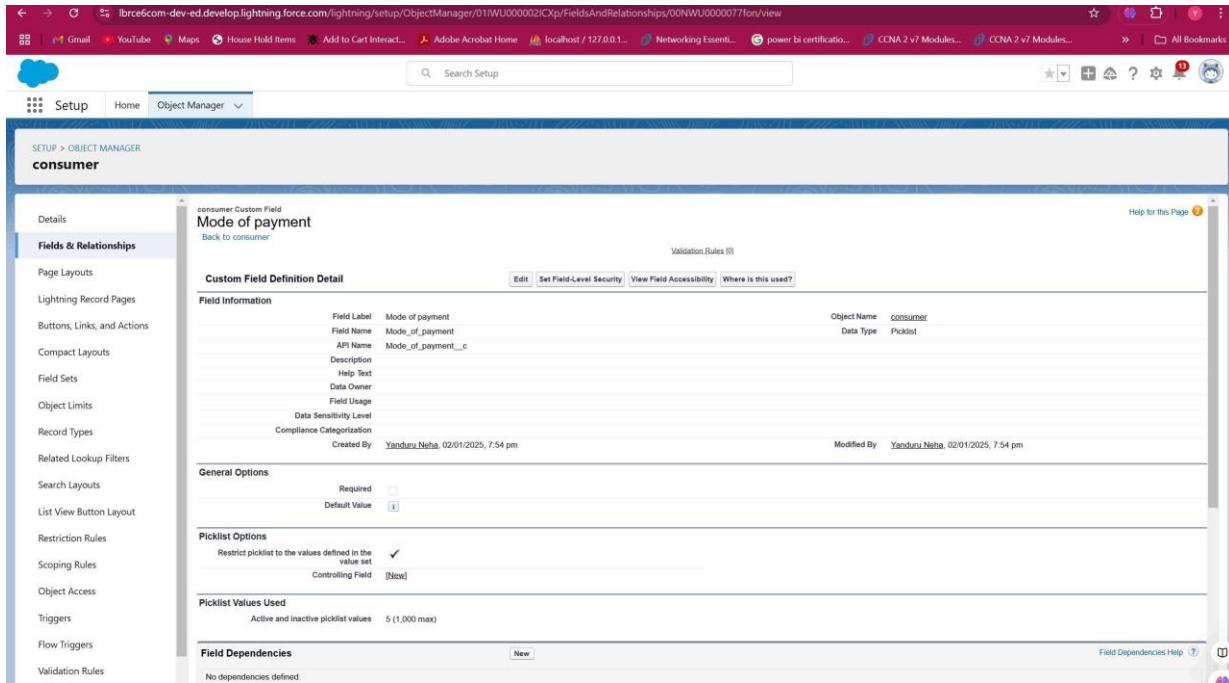
General Options

- Required:
- Default Value:

Validation Rules

No validation rules defined.

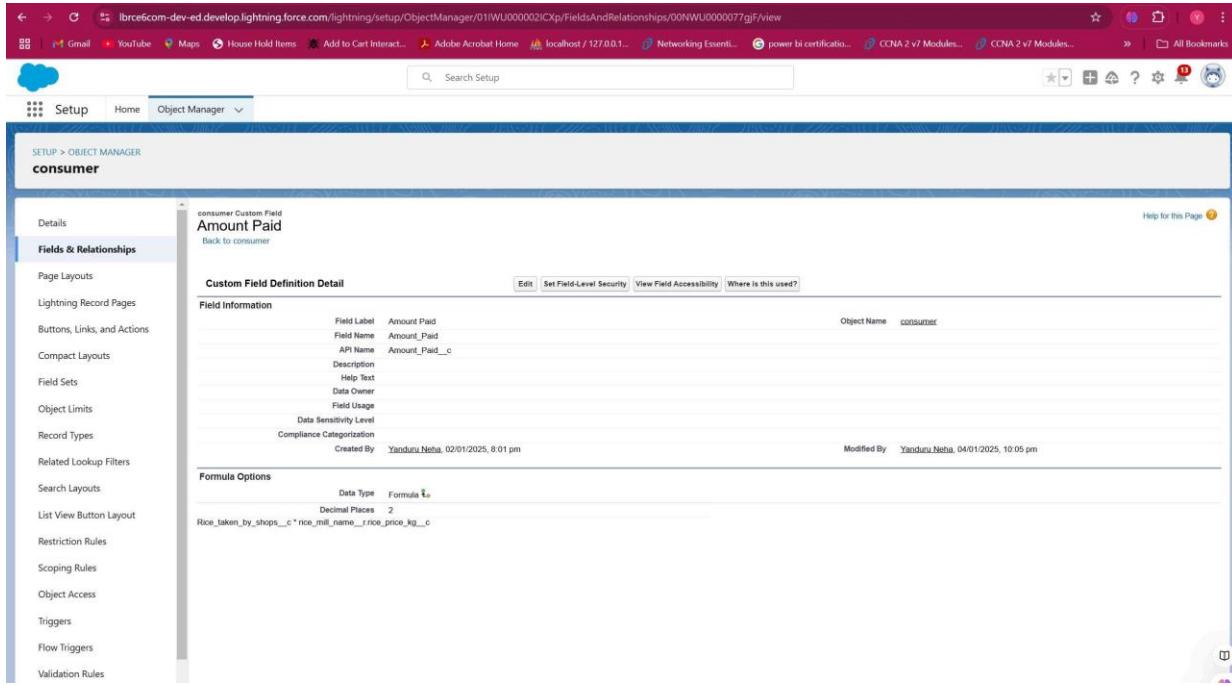
Create New Field For Mode Of Payment:



Activity 8: Creating Cross Object Formula Field in Consumer Object

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

- Goto setup → click on Object Manager → type object name (consumer) in the searchbar 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



- Give Field Label and Field Name as "AmountPaid" and select formula return type as "Number" and Next.
- Go to setup → click on Object Manager → type object name (consumer) in the searchbar
- Click on Fields & Relationships → click on New.
- Select Data type as "Formula" , click Next.
- Give FieldLabel and Field Name as "Consumer Name" and selectformula return type as "TEXT", click Next.
- Insert field formulashould 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 ValidationRule 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 PhoneNumber”.
- Save Validation rule .

The screenshot shows the Salesforce Setup interface for the 'consumer' object. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The 'Validation Rules' category is currently selected. In the main content area, a validation rule named 'Phonenumberoremailblankrule' is displayed. The rule details are as follows:

Rule Name	Phonenumberoremailblankrule
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	Yandaru Neha, 02/01/2025, 8:04 pm
Modified By	Yandaru Neha, 04/01/2025, 10:07 pm

The 'Active' checkbox is checked. The 'Error Location' is set to 'Top of Page'. At the bottom of the page, there are 'Edit' and 'Clone' buttons.

Overall SupplierFields

The screenshot shows the Salesforce Setup interface for the 'supplier' object. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The 'Fields & Relationships' category is currently selected. In the main content area, a table displays the fields and relationships for the 'supplier' object:

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	Name		

At the top of the table, there are buttons for 'Quick Find', 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. The table has scroll bars on the right side.

Overall Rice Mill Fields

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

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	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 Fields

The screenshot shows the Salesforce Object Manager interface for the 'rice details' object. The left sidebar lists various setup categories. The main content area displays a table titled 'Fields & Relationships' with 6 items. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
rice details Name	Name	Auto Number		✓
rice distributed	rice_distributed__c	Number(5, 0)		
rice mill 1(one)	rice_mill_1_one__c	Master-Detail(rice mill)		✓
supplier	supplier__c	Master-Detail(supplier)		✓

Overall Consumer Fields

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid__c	Formula (Number)		
Consumer Name	Consumer_Name__c	Formula (Text)		
consumer Name	Name	Auto Number		
Created By	CreatedBy	Lookup(User)		
email	email__c	Email		
First name	First_name__c	Text(30)		
Last Modified By	LastModifiedBy	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)		
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 ConsumerDetails 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 , ConsumerName , etc.
- 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.

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, recordtypes, 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 CustomObject 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 'Profiles' page open. The left sidebar includes sections like Hyperforce Assistant, Users, Data, Feature Settings, Data.com, Marketing, Sales, PRM, Products, and Salesforce Files. The main content area has a header 'SETUP Profiles'. It contains several tables for defining permissions:

- Custom Object Permissions:** A large table with columns for Labels, Leads, Legal Entities, Locations, Location Groups, Location Group Assignments, Location Shipping Carrier Methods, Work Orders, Work Plan Templates, Work Step Templates, Work Types, and Work Type Groups. Each row has checkboxes for Read, Create, Edit, Delete, View All, and Modify All.
- Custom Object Permissions (continued):** A smaller table for AppLogs, consumers, Providers, and Resources.
- Platform Event Permissions:** A table for AppLogEvents with columns for Basic Access (Read, Create).
- Session Settings:** Options for Session Timeout Out After (2 hours of inactivity), Separate Experience Cloud site and Salesforce login authentication for employees, Relax login IP restrictions, Skip employee device activation during Experience Cloud site login, and Allow OAuth for employees.
- Password Policies:** Policies for User password expiration (90 days), Enforce password history (3 passwords remembered), Minimum password length (8), Password complexity requirement (Must include alpha and numeric characters), and Password reuse requirement (Cannot reuse password).

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.
- Scroll down to CustomObject Permissions and give accesspermissions for consumer, rice details, rice mill, and suppliers objects as mentioned in the below diagram. Click Save.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The main area displays the 'Custom Object Permissions' section for the 'Employer' profile. It includes tables for 'Contact Point Addresses', 'Contact Point Consents', 'Contact Point Emails', 'Sellers', 'Streaming Channels', and 'User External Credentials'. Below this, there are sections for 'Custom Object Permissions' (listing 'AppLogs', 'consumers', 'Providers', and 'Resources') and 'Platform Event Permissions' (listing 'AppLogEvents'). At the bottom, there are 'Session Settings' and 'Password Policies' sections. The 'consumers' row in the 'Custom Object Permissions' table has checked boxes under 'Read' and 'Edit' for the 'rice details', 'rice mills', and 'supplier' objects.

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 CustomObject Permissions and give accesspermissions 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 profile named 'worker' is selected. The 'Profile Detail' section shows the profile name is 'worker', user license is 'Salesforce Platform', and it was created by 'Yanduru Neha' on '02/01/2025, 8:21 pm'. The 'Custom Profile' checkbox is checked. The 'Page Layouts' section lists various standard object layouts for different objects like Lead, Account, Order, etc. The left sidebar includes sections for Users, Data, Feature Settings, and Marketing.

Milestone 8: Role & Role Hierarchy

A role in Salesforce defines a user's visibility access at the recordlevel. Roles may be used to specify the types of access that peoplein your Salesforce organization can have to data. Simplyput, it describeswhat 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 with the 'Roles' page selected. The left sidebar shows navigation options like Sales, Service, and Case Teams. The main area displays the 'Creating the Role Hierarchy' section. A tree view shows the following structure:

- student
- CEO
- CFO
- COO
- owner
- employer
- worker
- SVP.Customer.Service & Support
- Customer.Support.International
- Customer.Support.North America
- Installation & Repair Services
- SVP.Human.Resources
- SVP.Sales & Marketing
- VP.International.Sales
- VP.Marketing
- Marketing Team
- VP.North.American.Sales

The 'employer' role is expanded, showing its edit, delete, and assign options. The 'worker' role is also visible under the 'employer' node.

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
 - Email: swapnathalla333@gmail.com
 - Username: swapnathalla333@gmail.com
 - Nickname: Vicky
 - Role: Owner
 - User License: Salesforce
 - Profile: Owner
 - Save it.

The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar is collapsed, and the main area displays the 'User Detail' section for a user named 'vicky y'. The 'Role' field is set to 'OWNER'. Other visible fields include 'User License' (Salesforce), 'Profile' (owner), and 'Active' (checked). The 'User Detail' section also lists various system settings like 'Time Zone', 'Locale', 'Language', and 'Delegated Approver'. A large number of checkboxes for various user-related features are listed on the right side of the screen, many of which are checked. The URL in the browser bar is ibrc6com-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005WU0000009Q9fB%3Fnoredirect%3D1%26isUserEntityOverride%3D1.

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: swapnathalla333@gmail.com
- Username: swapnathalla333@gmail.com
- Nickname: ram
- Role: Employer
- User License: Salesforce Platform
- Profile: StandardPlatform User
- Save it.

The screenshot shows the Salesforce Setup interface with the 'Users' section selected. A specific user record for 'ram ram' is being edited. The 'User Detail' tab is active, showing the following details:

- Name:** ram ram
- Alias:** rram
- Email:** nehayandura12@gmail.com [Verify]
- Username:** nehayandura@gmail.com
- Nickname:** User17359136933802251811
- Title:**
- Company:**
- Department:**
- Division:**
- Address:**
- Time Zone:** (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale:** English (India)
- Language:** English
- Delegated Approver:**
- Manager:**
- Receive Approval Request Emails:** Only if I am an approver
- Federation ID:**
- App Registration: One-Time Password Authenticator:**
- App Registration: Salesforce Authenticator:**
- Security Key (2FA or WebAuthn):**
- Lightning Login:**
- Temporary Verification Code (Expires in 1 to 24 Hours):** [Generated]

User License: Standard Platform User

Role: employer

Profile: Standard Platform User

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WCC User:

Mobile Push Registrations: View

Data.com User Type:

Accessibility Mode (Classic Only):

Debug Mode:

High-Contrast Pallete on Charts:

Load Lightning Pages While Scrolling:

Salesforce CRM Content User:

Receive Salesforce CRM Content Email Alerts:

Receive Salesforce CRM Content Alerts as Daily Digest:

Make Setup My Default Landing Page:

Allow Forecasting:

No MRU Updates:

Call Center:

Phone:

Extension:

Fax:

Mobile:

- 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: swapnathalla333@gmail.com
 - Username: swapnathalla333@gmail.com

- Nickname: ragu
- Role: Worker
- User License: Salesforce Platform
- Profile: StandardPlatform User
- Save it.

The screenshot shows the Salesforce Setup interface under the 'Users' section. A new user record is being created for 'ragu raj'. The user details include:

- Alias:** raju
- Email:** dehavanduru22@gmail.com [Verify]
- Username:** dehavanduru123@gmail.com
- Nickname:** User17359138192904332785
- Title:**
- Company:**
- Department:**
- Division:**
- Address:**
- Time Zone:** (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale:** English (India)
- Language:** English
- Delegated Approver:** Manager
- Receive Approval Request Emails:** Only if I am an approver
- Federation ID:**
- App Registration: One-Time Password Authenticator:**
- App Registration: Salesforce Authenticator:**
- Security Key (2FA or WebAuthn):**
- Lightning Login:**
- Temporary Verification Code (Expires in 1 to 24 Hours):** [Generated]

The 'User License' section shows 'Standard Platform User' selected. Other options like 'Marketing User', 'Offline User', etc., are available but not selected. The 'Profile' dropdown also has 'Standard Platform User' selected. The 'Public Group Membership' tab is active, showing a new group named 'New Group' with no records displayed.

The screenshot shows the Salesforce Setup interface under the 'Users' section, displaying a list of all users. The table includes columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The users listed are:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty@00wv000000cked2ar.dow@0mg0qj@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Grey_Jay	grey	grey_gray.ytymimmoam.khngufvntse@ibro8.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/>	Neha_Yaduru	Yneha	nehavanduru12@ibrcd.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	rah_1991	rah	nehavanduru123@gmail.com	worker	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	rah_ran	rah	nehavanduru12@gmail.com	employee	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	User_Integration	integ	integration@00wuv000000ckew2ar.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00wuv000000ckew2ar.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>	y_sticky	YI	nehavanduru12@gmail.com	owner	<input checked="" type="checkbox"/>	owner

At the bottom of the page, there are links for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Milestone 10: Permission Sets

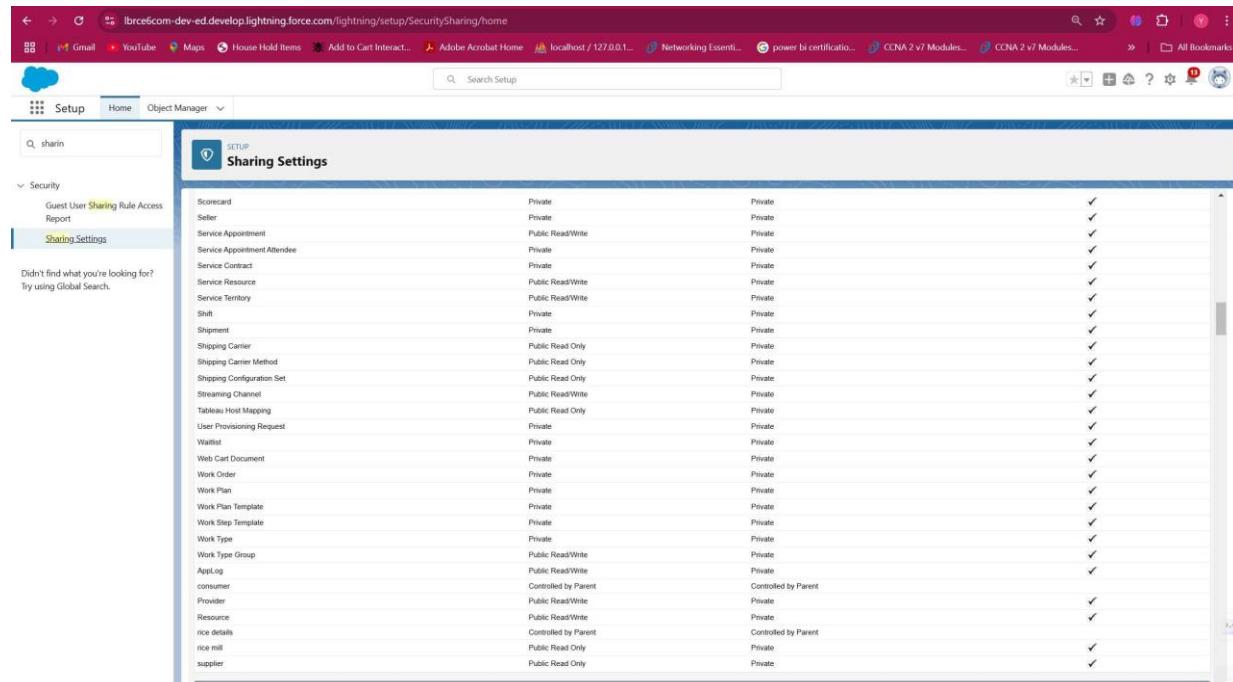
A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles and are the recommended way to manage your users' permissions.

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 left sidebar is titled 'Security' and includes links for 'Sharing Rule Access Report' and 'Sharing Settings'. The main content area is titled 'Sharing Settings' and displays a table of objects and their sharing rules. The table columns are 'Object' (list of objects), 'Default Internal Access' (mostly Private, except for Service Appointment, Service Appointment Attendee, Service Contract, Service Resource, Service Territory, Shift, Shipment, Shipping Carrier, Shipping Carrier Method, Shipping Configuration Set, Streaming Channel, Tableau Host Mapping, User Provisioning Request, Waitlist, Web Cart Document, Work Order, Work Plan, Work Plan Template, Work Step Template, Work Type, Work Type Group, AppLog, consumer, Provider, Resource, rice details, rice mill, supplier), and 'Default External Access' (mostly Private, except for Service Appointment, Service Appointment Attendee, Service Contract, Service Resource, Service Territory, Shift, Shipment, Shipping Carrier, Shipping Carrier Method, Shipping Configuration Set, Streaming Channel, Tableau Host Mapping, User Provisioning Request, Waitlist, Web Cart Document, Work Order, Work Plan, Work Plan Template, Work Step Template, Work Type, Work Type Group, AppLog, consumer, Provider, Resource, rice details, rice mill, supplier). A checkmark icon is present in the top right corner of the table header.

Object	Default Internal Access	Default External Access
Scorecard	Private	Private
Seller	Private	✓
Service Appointment	Public Read/Write	✓
Service Appointment Attendee	Private	✓
Service Contract	Private	✓
Service Resource	Public Read/Write	✓
Service Territory	Public Read/Write	✓
Shift	Private	✓
Shipment	Private	✓
Shipping Carrier	Public Read Only	✓
Shipping Carrier Method	Public Read Only	✓
Shipping Configuration Set	Public Read Only	✓
Streaming Channel	Public Read/Write	✓
Tableau Host Mapping	Public Read Only	✓
User Provisioning Request	Private	✓
Waitlist	Private	✓
Web Cart Document	Private	✓
Work Order	Private	✓
Work Plan	Private	✓
Work Plan Template	Private	✓
Work Step Template	Private	✓
Work Type	Private	✓
Work Type Group	Public Read/Write	✓
AppLog	Public Read/Write	✓
consumer	Controlled by Parent	Controlled by Parent
Provider	Public Read/Write	✓
Resource	Public Read/Write	✓
rice details	Controlled by Parent	Controlled by Parent
rice mill	Public Read Only	Private
supplier	Public Read Only	✓

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
1 item

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	range of amount per day	estimated rice per day	MY RICE	Yanduru Neha	3/1/2025, 8:28 pm	✓

Created by Me

- Private Reports
- Public Reports
- All Reports

FOLDERS

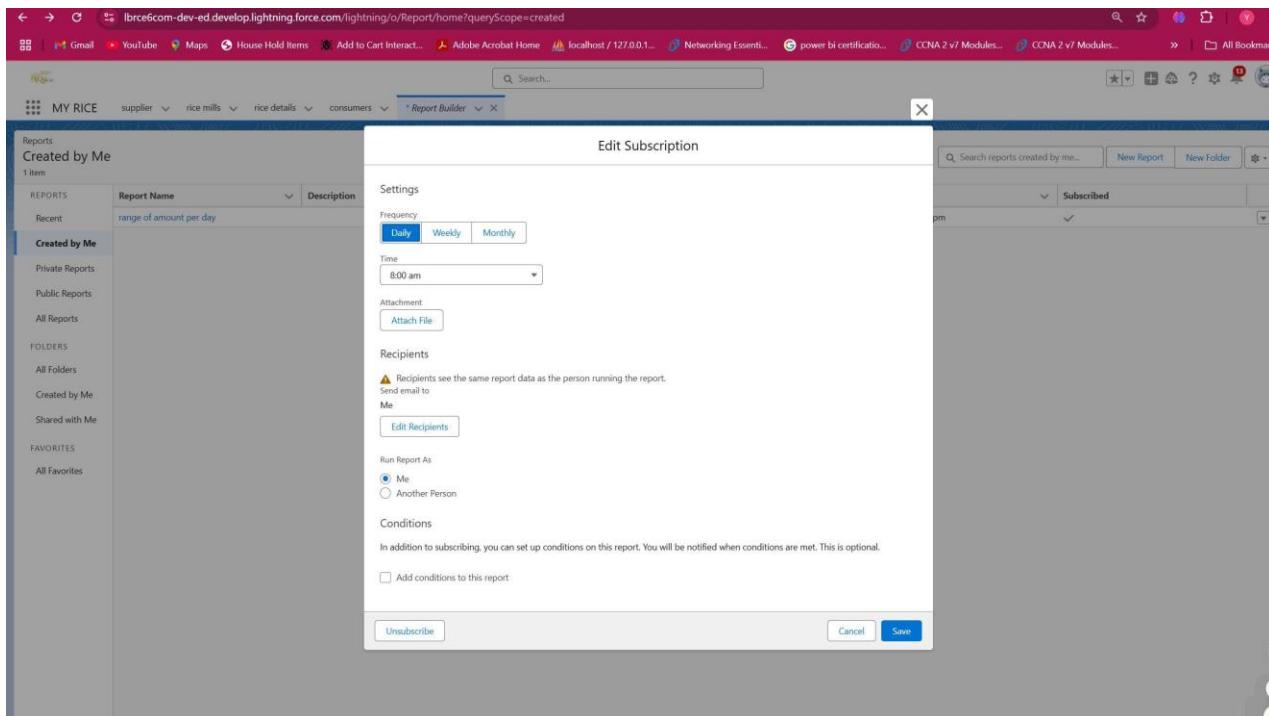
- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

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 reports 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.

Name	Created By	Created On	Last Modified By	Last Modified Date
Einstein Bot Reports	Automated Process	21/12/2024, 10:07 pm	Automated Process	21/12/2024, 10:07 pm
Einstein Bot Reports Summer '23	Automated Process	21/12/2024, 10:07 pm	Automated Process	21/12/2024, 10:07 pm
Einstein Bot Reports Summer '22	Automated Process	21/12/2024, 10:07 pm	Automated Process	21/12/2024, 10:07 pm
Einstein Bot Reports Winter '23	Automated Process	21/12/2024, 10:07 pm	Automated Process	21/12/2024, 10:07 pm
estimated rice per day	Yanduru Neha	3/1/2025, 8:31 pm	Yanduru Neha	3/1/2025, 8:31 pm
PRM Reports	Automated Process	21/12/2024, 10:07 pm	Automated Process	21/12/2024, 10:07 pm

Overall Reports (Range of amount per day)

Total Records	Total rice price/kg	Total Amount Paid			
10	670	69,300.00			
Report: rice mills with consumers range of amount per day					
Rice taken by shops	consumer: consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
50 (2)	consumers-001	basmati	20	Credit card	1,000.00
	consumers-006	basmati	80	Debit card	4,000.00
Subtotal			100		5,000.00
70 (1)	consumers-007	normal rice	70	Net banking	4,900.00
Subtotal			70		4,900.00
80 (1)	consumers-008	normal rice	80	Cash	6,400.00
Subtotal			80		6,400.00
89 (1)	consumers-010	basmati	100	Credit card	8,900.00
Subtotal			100		8,900.00
90 (1)	consumers-009	basmati	90	Net banking	8,100.00
Subtotal			90		8,100.00
100 (1)	consumers-002	normal rice	100	Debit card	10,000.00
Subtotal			100		10,000.00
150 (1)	consumers-003	basmati	50	Net banking	7,500.00
Subtotal			50		7,500.00
200 (1)	consumers-004	basmati	30	Debit card	6,000.00
Subtotal			30		6,000.00
250 (1)	consumers-005	normal rice	50	UPI	12,500.00
Subtotal			50		12,500.00
Total (10)			670		69,300.00

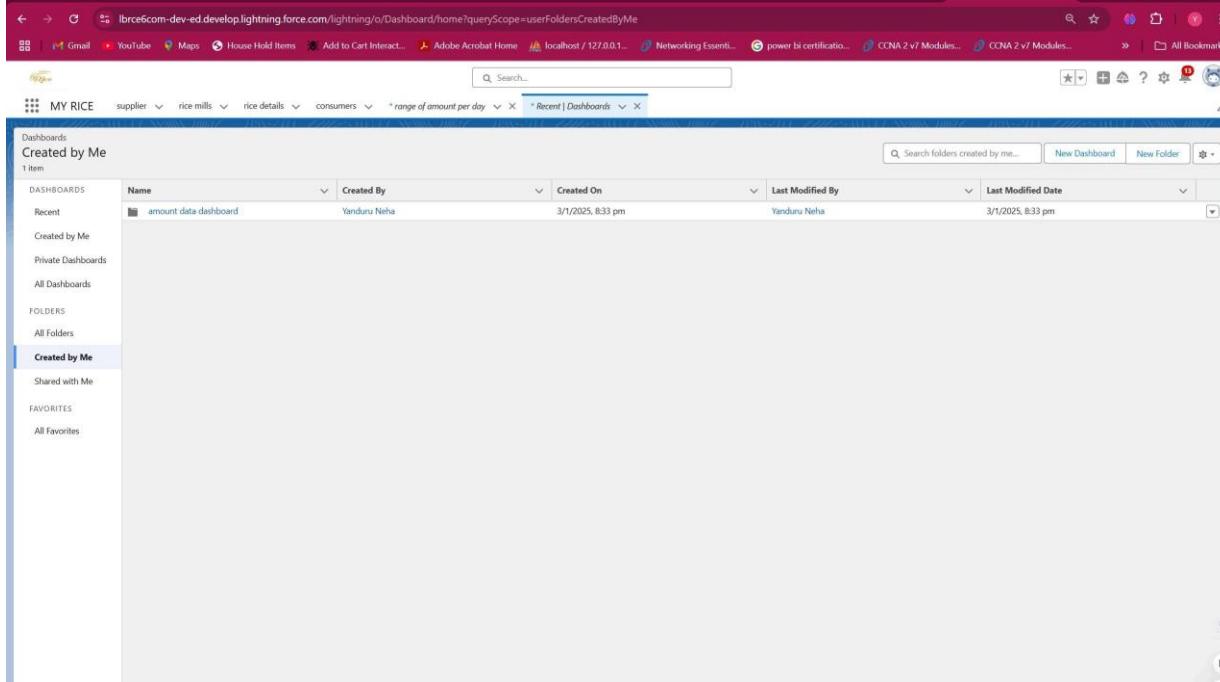
Milestone 12: Dashboards

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 DashboardFolder

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 UniqueName will be auto-populated.
- Click Save.



The screenshot shows a browser window for the URL lbrc6com-dev-ed.lightning.force.com/lightning/o/Dashboard/home?queryScope=userFoldersCreatedByMe. The page title is "Dashboards Created by Me". On the left, there's a sidebar with categories: DASHBOARDS (Recent, Created by Me, Private Dashboards, All Dashboards), FOLDERS (All Folders, Created by Me, Shared with Me), and FAVORITES (All Favorites). The main content area displays a table titled "Dashboards Created by Me" with one item: "amount data dashboard" created by "Yanduru Neha" on "3/1/2025, 8:33 pm" and last modified by "Yanduru Neha" on "3/1/2025, 8:33 pm". There are buttons for "Search folders created by me...", "New Dashboard", and "New Folder".

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 ComponentDetails:

- 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

SecondComponent 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

