

A CRM APPLICATION FOR WHOLESALE RICE MILL

By

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Project Abstract

Introduction:

This project involves the development of a CRM application on the Salesforce platform tailored for wholesale rice mills. The application aims to enhance operational efficiency, improve data accuracy, and support strategic decision-making by integrating consumer management, inventory tracking, sales processing, and financial reporting into a single platform.

Objective:

To provide a centralized and user-friendly CRM system that streamlines core business processes, enhances customer relationship management, optimizes inventory levels, ensures accurate sales tracking, and facilitates comprehensive financial reporting.

Key Features:

1. Consumer Management:
 - Detailed consumer profiles with fields like name, contact details, rice taken, and payment methods.
2. Rice Inventory Management:
 - Track rice types, quantities, prices, and supplier information.
3. Sales Tracking:
 - Record sales transactions including consumer details, rice types, quantities, and total amounts.
4. Payment Processing:
 - Record payments with details such as amount paid, payment date, and mode of payment.
5. Reporting and Analytics:
 - Generate detailed reports and dashboards on consumers, sales, payments, and inventory.

Conclusion:

The CRM application for wholesale rice mills harnesses Salesforce's capabilities to transform traditional operations. By integrating key business functions into a cohesive system, it enables rice mill businesses to operate efficiently, make informed decisions, and achieve sustainable growth.

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INTRODUCTION

In today's competitive landscape, wholesale rice mills must navigate complex operations and maintain high levels of efficiency to remain successful. Effective management of consumer relationships, inventory, sales, and financial transactions is crucial to achieving this goal. However, traditional methods of managing these processes are often cumbersome, error-prone, and time-consuming.

This project introduces a cutting-edge CRM (Customer Relationship Management) application built on the Salesforce platform, specifically designed to address the unique needs of wholesale rice mills. The application aims to provide a centralized, user-friendly platform that streamlines and automates core business processes, significantly enhancing operational efficiency and data accuracy.

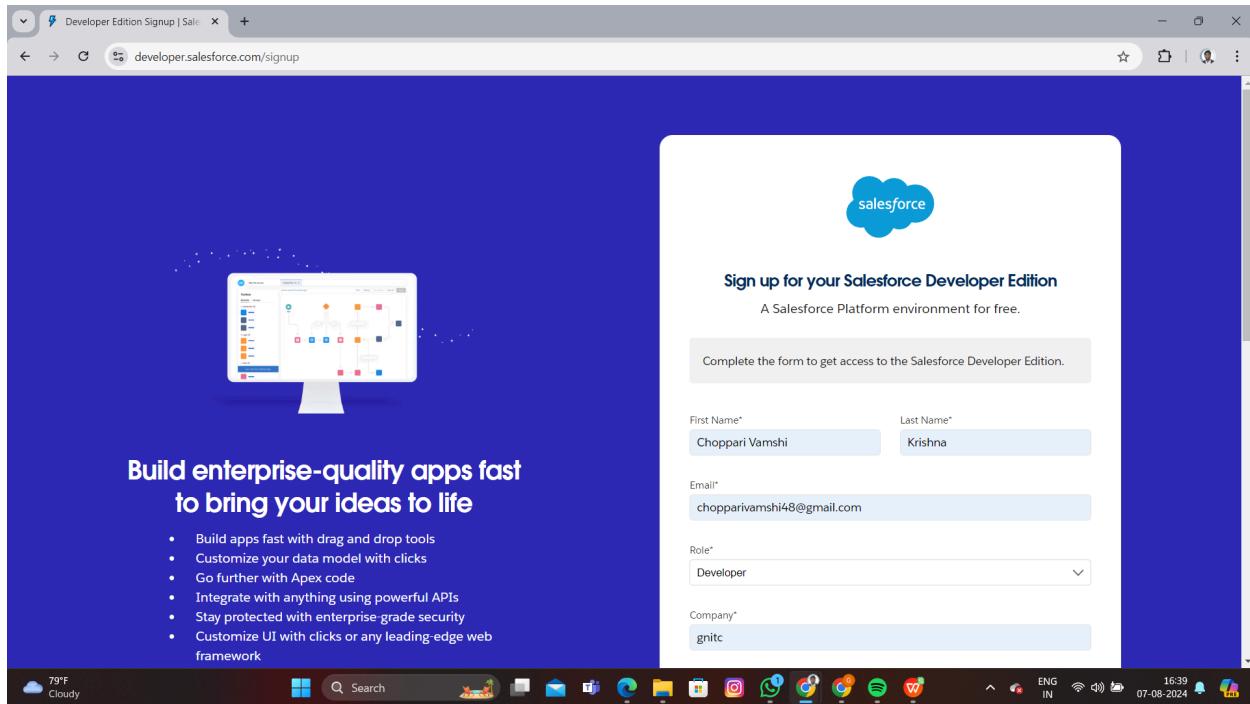
The CRM application focuses on several key areas:

1. Consumer Management: It enables the rice mill to maintain comprehensive profiles for each consumer, capturing essential information such as contact details, rice purchases, payment methods, and more. This facilitates improved customer service and strengthens consumer relationships.
2. Rice Inventory Management: The application provides robust tools for tracking rice inventory, including details on rice types, quantities available, pricing, and supplier information. This ensures optimal stock levels and efficient inventory management, preventing both shortages and overstocking.
3. Sales Tracking: The system meticulously records all sales transactions, linking them to the appropriate consumers and inventory items. This allows for precise sales monitoring, trend analysis, and revenue tracking, offering valuable insights into business performance.
4. Payment Processing: Accurate tracking of payments is crucial for financial health. The application records all payment details, ensuring timely and accurate financial reconciliation and facilitating smooth financial operations.
5. Reporting and Analytics: Comprehensive reporting capabilities allow for the generation of detailed reports and dashboards, covering various aspects of the business. These insights support data-driven decision-making and strategic planning, helping the rice mill to identify opportunities for improvement and growth.

Task 1:

Creating Developer Account

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :



1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

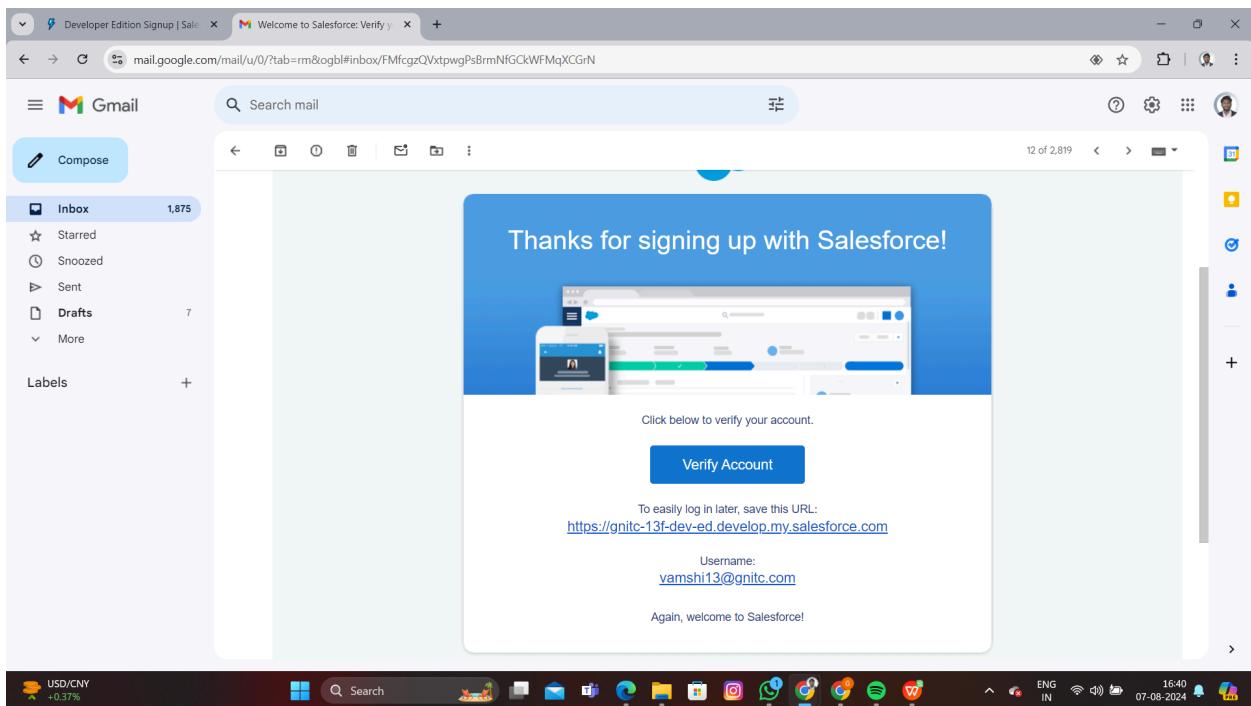
This need not be an actual email id, you can give anything in the format : username@organization.com

Click on sign me up after filling these.

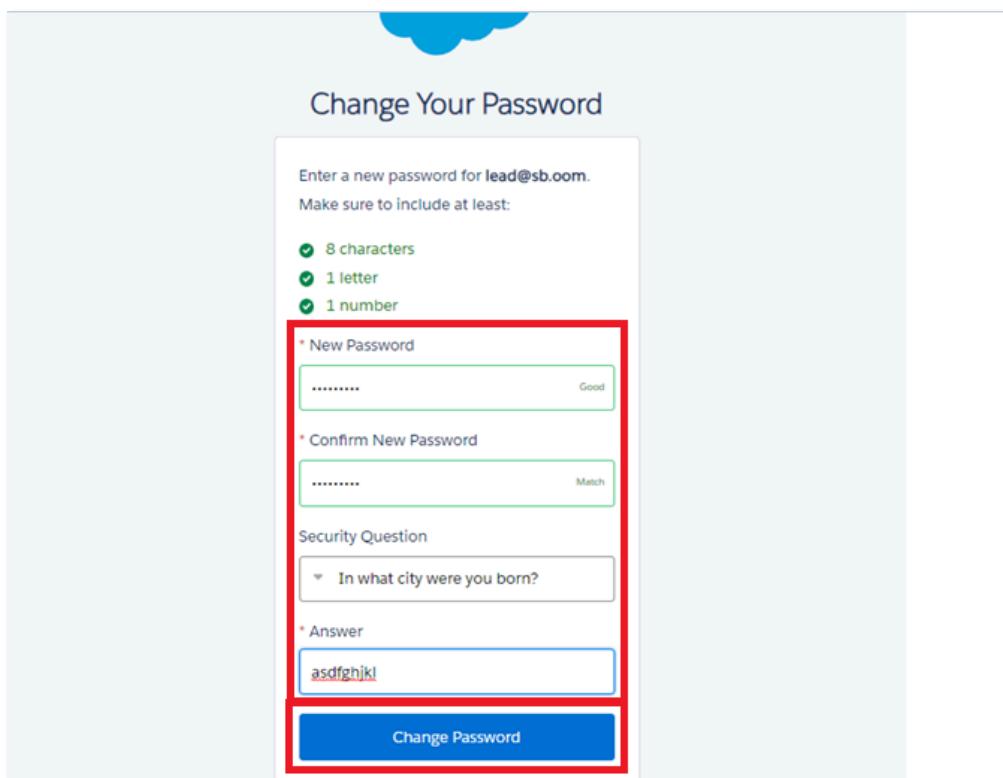
Task 2:

Account Activation

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



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.



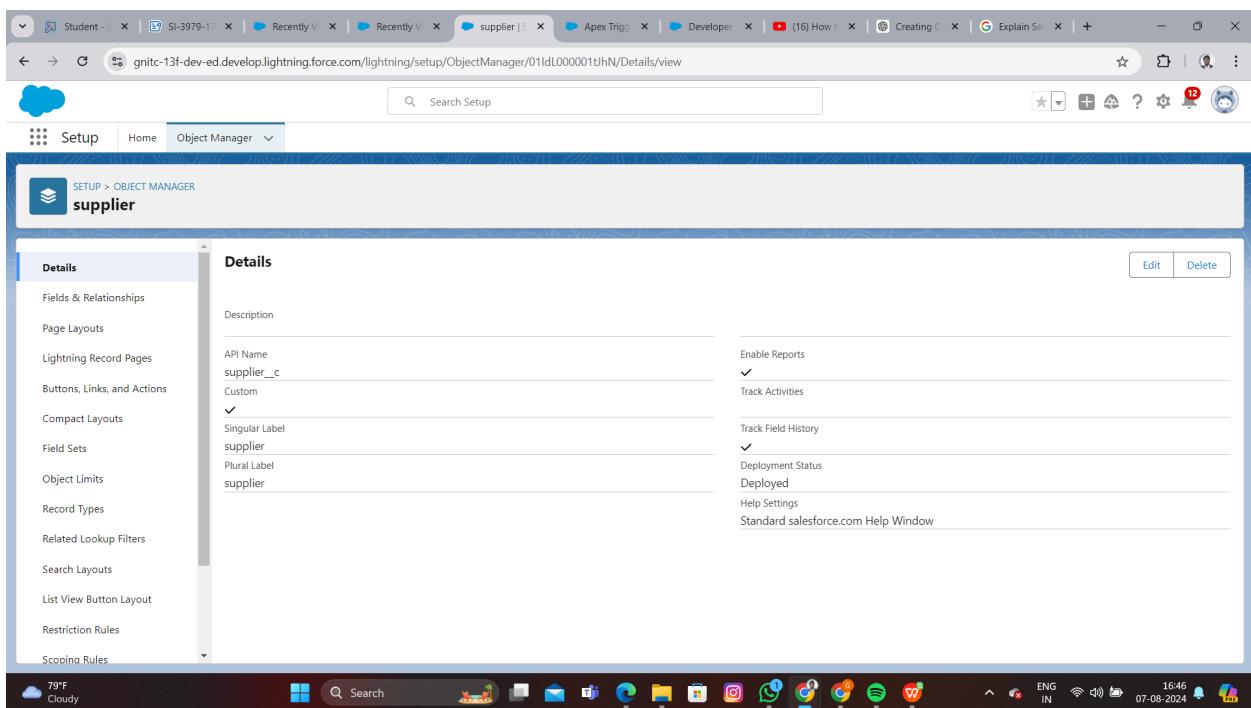
4. Then you will redirect to your salesforce setup page.

Task 3:

Create Supplier Object

To create an object:

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



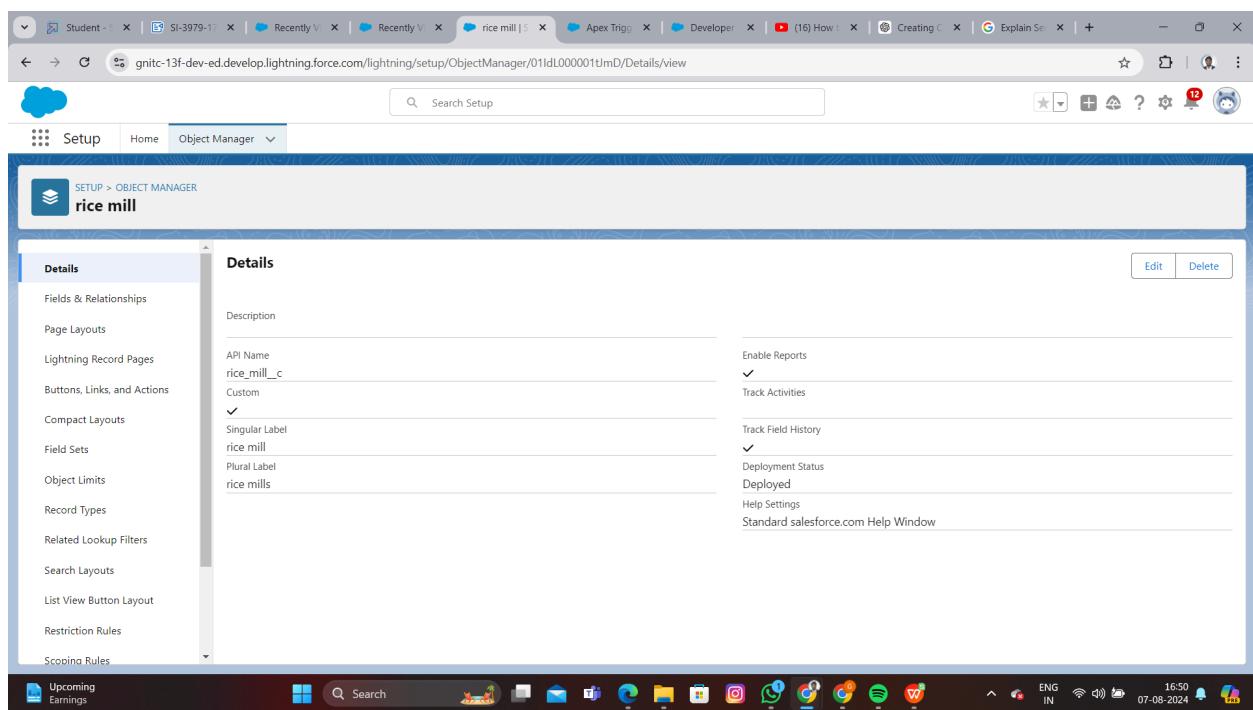
Task 4:

Create Rice mill Object

To create an object:

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

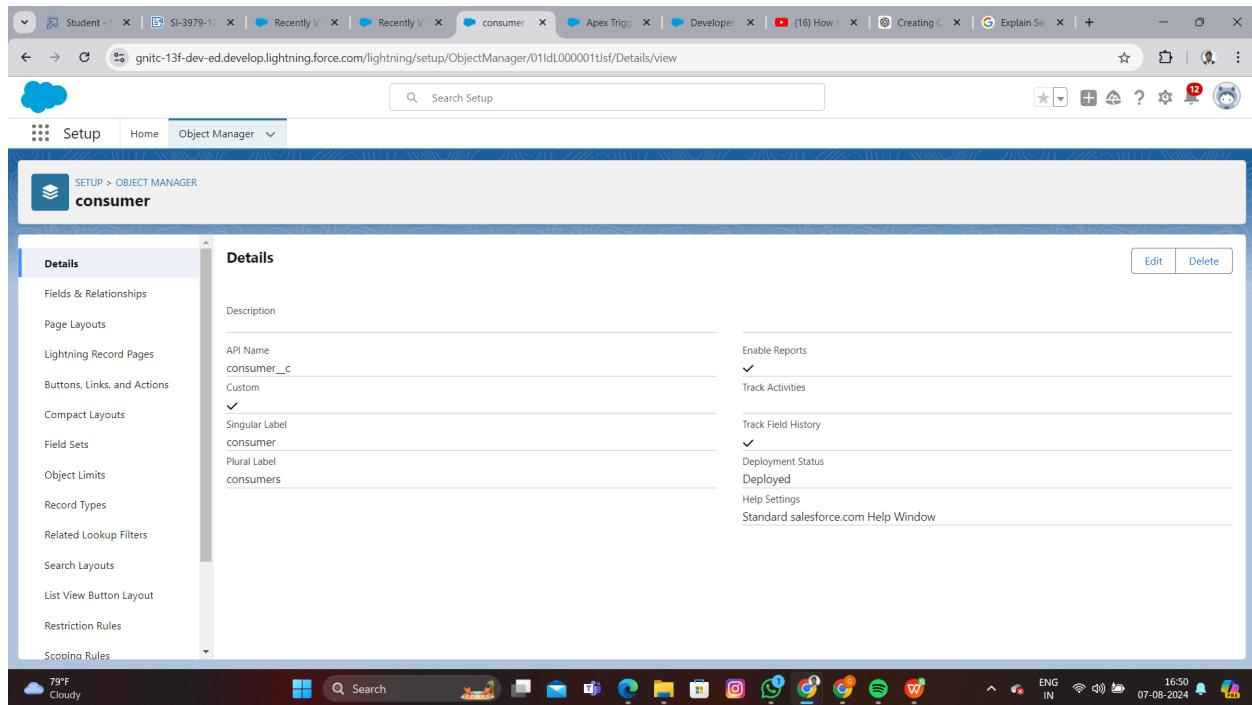
2. Click on Allow reports and Track Field History, Allow Search and Save.



Task 5:

Create consumer Objects

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

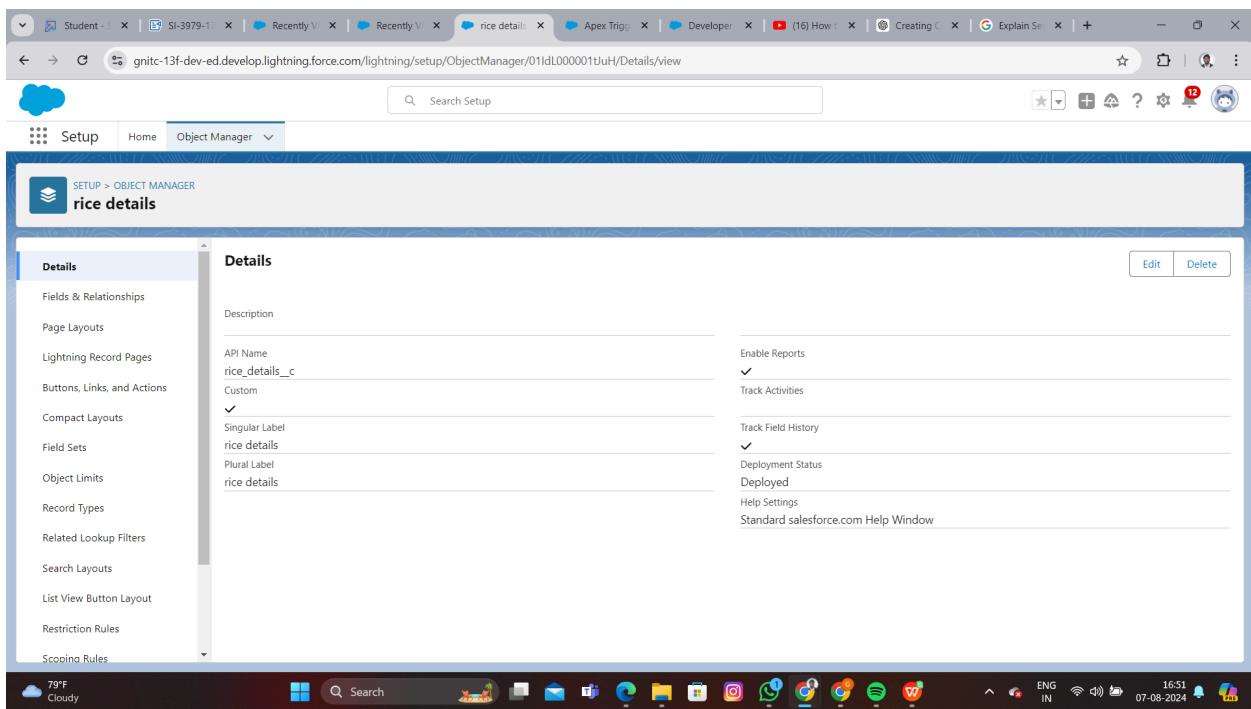


Task 6:

Create rice details Objects

1. From the setup page >> Click on Object Manager>>Click on Create >> Click on Custom Object.
1. Enter the label name>>rice details
2. Plural label name>> rice details
3. Enter Record Name Label and Format
 - Record Name >>
 - Data Type >> Auto Number
 - Display Format >> rice-{000}
 - Starting number >> 1

2. Click on Allow reports and Track Field History, Allow Search and Save.

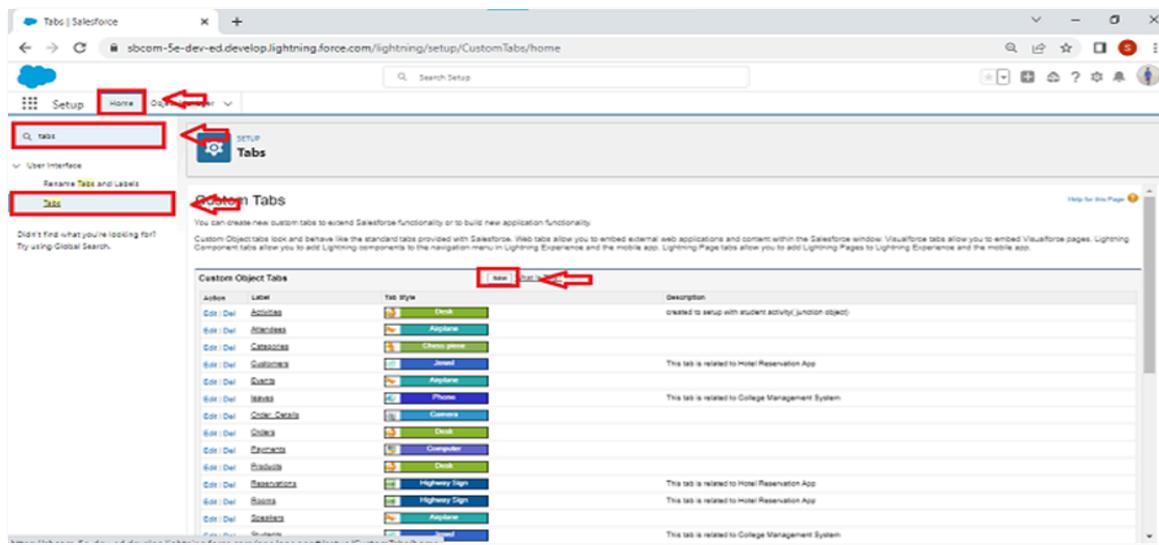


Task 7:

Creating a Custom Tab

To create a Tab:(supplier)

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



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

SETUP **Tabs**

Edit Custom Object Tab
Suppliers

Fill in the fields below to define the custom tab.

Custom Tab Definition Edit

Custom Object Tab Information

Tab Label: **suppliers**
Object: **supplier**
Tab Style: **Box**

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link: **--None--**

Enter a short description.

Description:

Save **Cancel**

Tab Style Selector **Create your own style**

Hide styles which are used on other tabs

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

Save **Cancel**

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

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

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

Task 8:

Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “ rice mill, consumer , rice details”.
2. Follow the same steps as mentioned in Task 7.

The screenshot shows the Salesforce Setup interface for creating Custom Tabs. The left sidebar has 'User Interface' expanded, with 'Tabs' selected under 'Rename Tabs and Labels'. The main content area is titled 'Custom Tabs' and contains three sections: 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. The 'Custom Object Tabs' section lists four tabs with their labels and styles:

Action	Label	Tab Style	Description
Edit Del	consumers	Bank	
Edit Del	rice details	Books	
Edit Del	rice mills	Building	
Edit Del	supplier	Airplane	

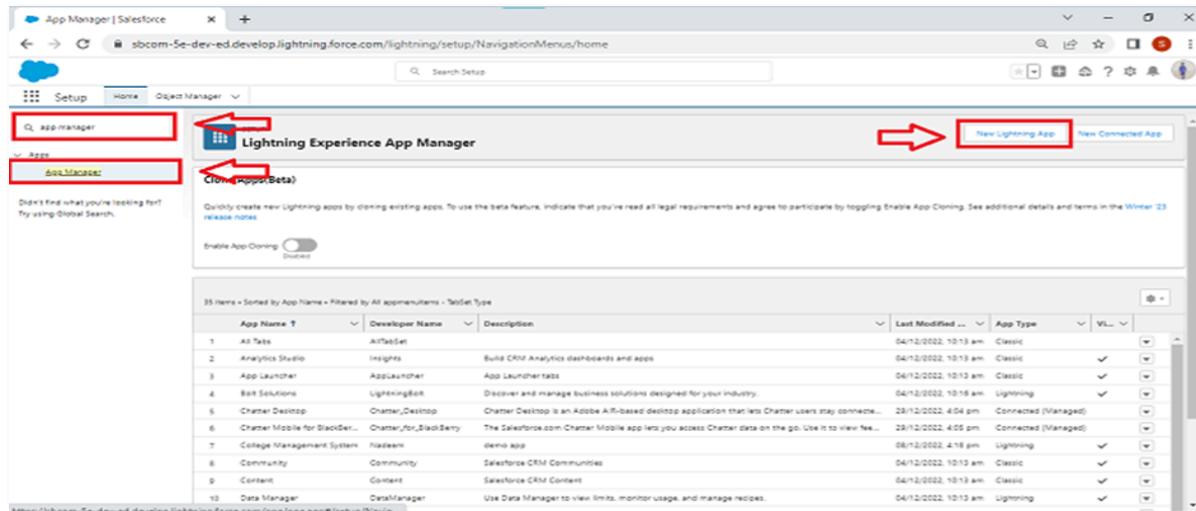
The 'Web Tabs' and 'Visualforce Tabs' sections both indicate 'No Web Tabs have been defined' and 'No Visualforce Tabs have been defined' respectively.

Task 9:

Create a Lightning App

To create a lightning app page:

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

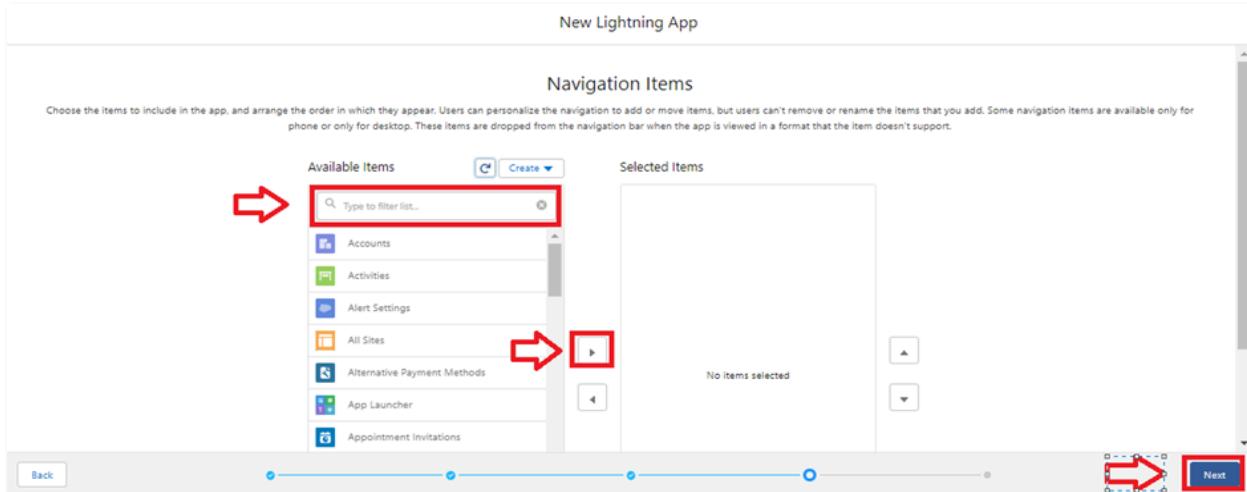


2. Fill the app name in app details as MY RICE >> Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.

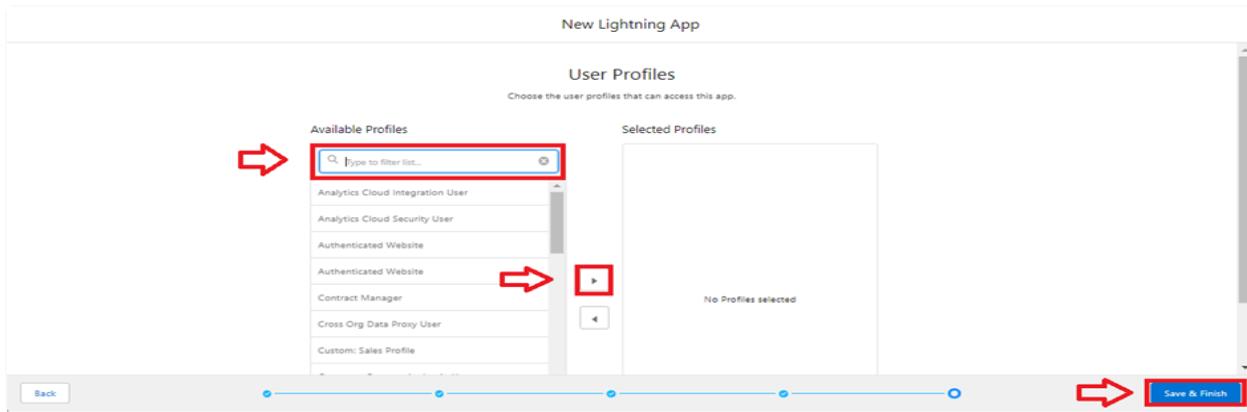
3.

The screenshot shows the "New Lightning App" configuration page. It has two main sections: "App Details" and "App Branding". In the "App Details" section, there is a required field "App Name" with the placeholder "Name your app...". A red arrow points to this field. Below it are "Developer Name" and "Description" fields. In the "App Branding" section, there is an "Image" upload field with a blue "Upload" button and a "Primary Color Hex Value" field set to "#007002". There are also "Org Theme Options" and "App Launcher Preview" sections. At the bottom, there is a progress bar with several steps and a large red "Next" button.

4. Upload a photo that is related to your app.
5. To add Navigation Item:



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



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

gnitc-13f-dev-ed.lightning.force.com/lightning/o/supplier_c/list?filterName=_Recent

MY RICE

supplier rice mills consumers rice details Reports Dashboards

supplier Recently Viewed

0 items • Updated a few seconds ago

supplier Name ↑

You haven't viewed any supplier recently.
Try switching list views.

javascipt:void(0);

79°F Cloudy

Search

ENG IN 16:55 07-08-2024

Task 10:

Creating the number field in rice details object

Creating the number field in rice details object

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

The screenshot shows the Salesforce Object Manager interface. A red box highlights the 'Object Manager' tab in the top navigation bar. Another red box highlights the search bar containing 'student'. A third red box highlights the 'Label' column for the 'Student' object in the list.

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

The screenshot shows the 'Fields & Relationships' section for the 'Supplier' object. A red box highlights the 'Fields & Relationships' tab in the left sidebar. Another red box highlights the 'New' button at the top right of the list table. The table lists various fields with their labels, names, data types, controlling fields, and indexing status.

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 Fuel supplied	Sum_of_Fuel_supplied__c	Roll-Up Summary (SUM Fuel details)		
supplier Name	Name	Text(80)		✓

3. Select Data type as "Number" and click Next.
4. Given the Field Label as "rice distributed" and length as "5".

Step 2. Enter the details Step 2 of 4

Field Label 18

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length 18 Number of digits to the left of the decimal point Decimal Places 0 Number of digits to the right of the decimal point

Field Name

Description

Help Text

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

Unique Do not allow duplicate values

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

AI Prediction Use this field to store AI prediction scores

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

Next > Cancel

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

rice details Custom Field
rice distributed

Object Manager

Custom Field Definition Detail

Field Information

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	Choppari Vamshi Krishna	Modified By	Choppari Vamshi Krishna
	04/08/2024, 1:20 pm		04/08/2024, 1:20 pm

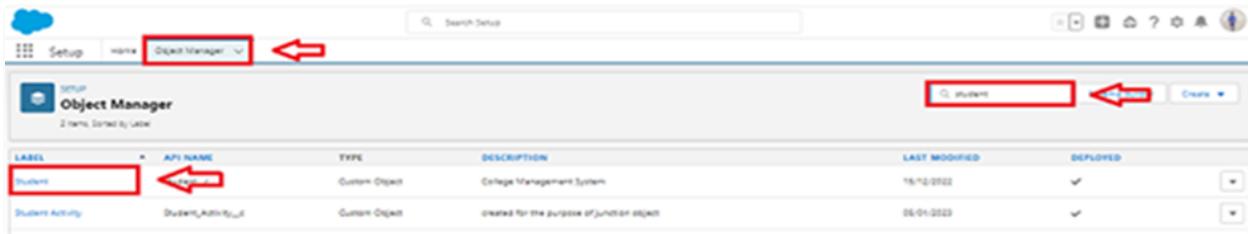
General Options

- Required
- Unique
- External ID
- AI Prediction
- Default Value

Task 11:

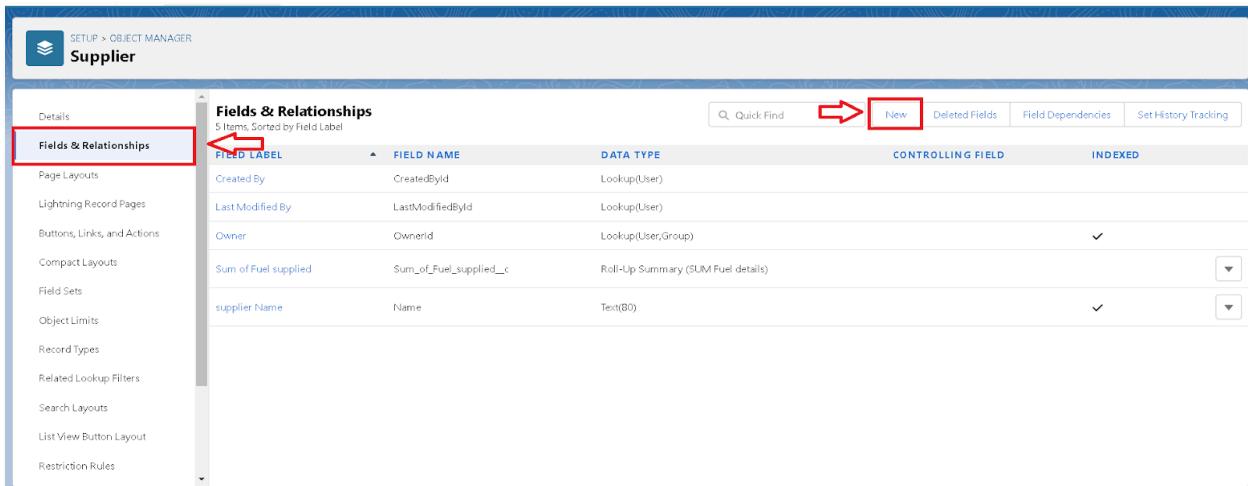
Creating Junction Object

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



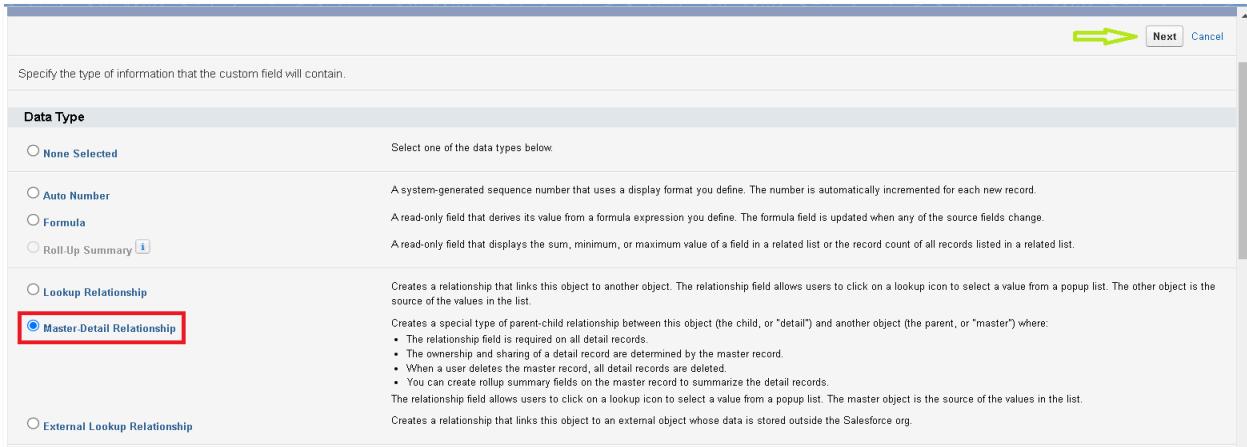
The screenshot shows the Salesforce Object Manager. A red box highlights the 'Object Manager' tab in the top navigation bar. Another red box highlights the search bar containing 'student'. A third red box highlights the 'Label' column for the 'Student' object.

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



The screenshot shows the 'Fields & Relationships' page for the 'Supplier' object. A red box highlights the 'Fields & Relationships' tab in the left sidebar. Another red box highlights the 'New' button at the top right of the main table area.

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



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

Data Type

None Selected Select one of the data types below.

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

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

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

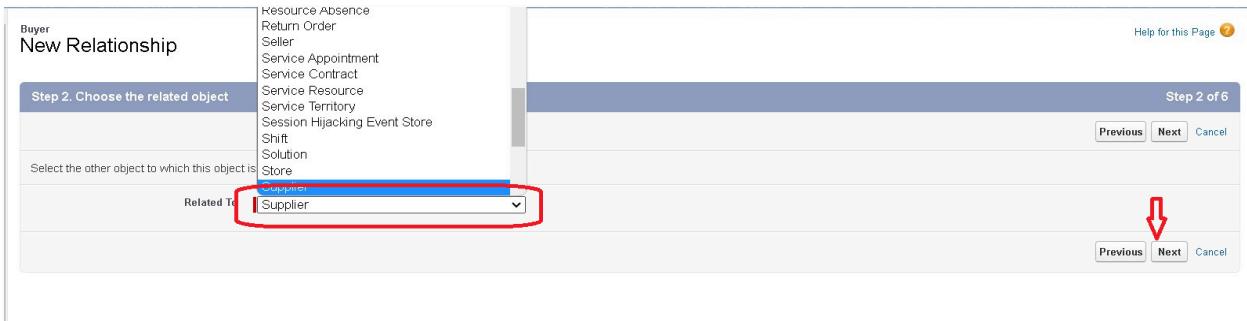
Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

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

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

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

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



Buyer New Relationship

Help for this Page ⓘ Step 2 of 6

Step 2. Choose the related object

Select the other object to which this object is related

Related To: Supplier

Previous Next Cancel

5. Give Field Label as “supplier Name” and click Next.
6. Next >> Next >> Save & New.
7. Follow the same steps from 1 to 3.
8. Select the related object “ rice mill ” and click Next.
9. Give Field Label as “rice mill 1(one)” and click Next.
10. Next >> Next >> Save.

The screenshot shows the Salesforce Setup interface with the URL gnitc-13f-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01ldL000001UuH/FieldsAndRelationships/00NdL000004CVVZ/view. The page title is "rice details". The left sidebar shows navigation options like Setup, Home, and Object Manager. The main content area is titled "rice details Custom Field supplier Name". It includes tabs for "Validation Rules [0]", "Edit", "Set Field-Level Security", "View Field Accessibility", and "Where is this used?". The "Field Information" section shows the following details:

Field Label	supplier Name	Object Name	rice_details
Field Name	supplier_Name	Data Type	Master-Detail
API Name	supplier__Name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Below this, the "Master-Detail Options" section shows:

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"/>		

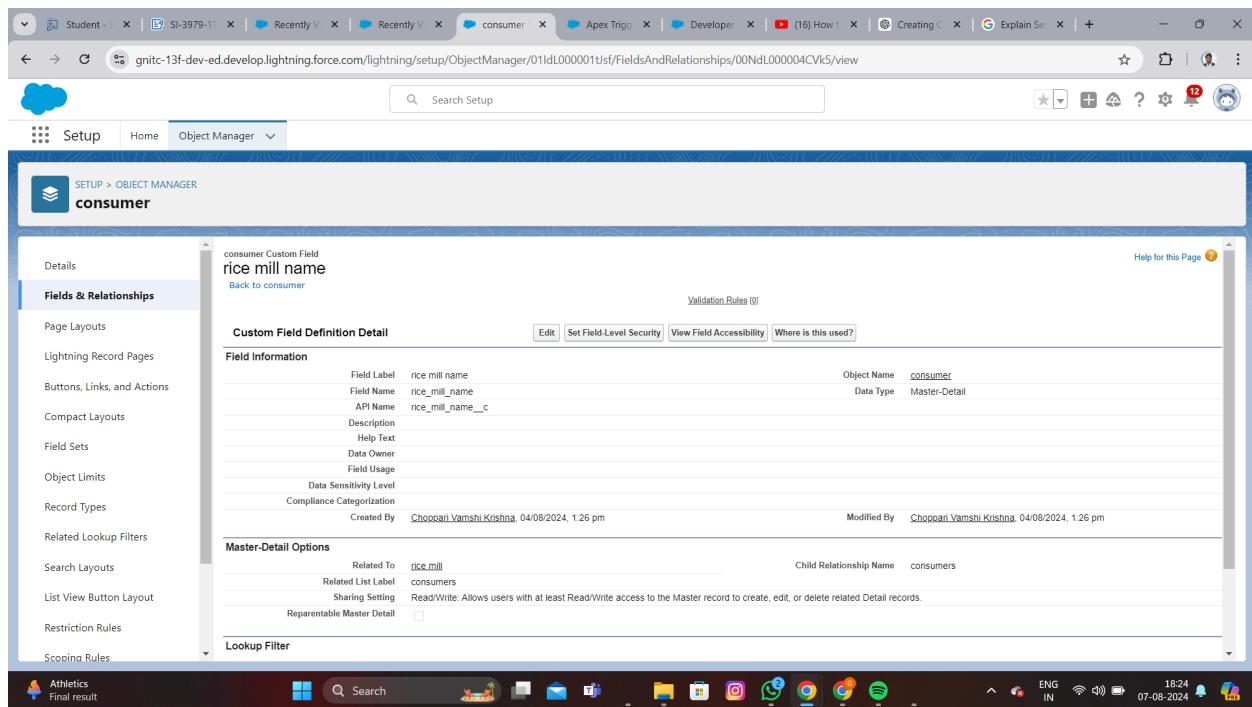
At the bottom, there is a "Lookup Filter" section and a "Scoping Rules" link.

Task 12:

Creating a Master-Detail Relationship

Creating Master-Detail Relationship between consumer & rice mill Object
To Create a Master-Detail relationship

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



Task 13:

Creating the Roll-up Summary

1. Go to setup >> click on Object Manager >> type object name(supplier) in search bar >> click on the object.

The screenshot shows the Salesforce Object Manager interface. At the top, there is a search bar with the text 'student'. Below it, a table lists objects: 'Student' (Custom Object, College Management System), 'Student Activity' (Custom Object, created for the purpose of junction object). Red arrows point to the 'Object Manager' tab, the search bar, and the 'Student' API name field.

2. Now click on "Fields & Relationships" >> New

The screenshot shows the 'Fields & Relationships' section for the 'Student' object. A red arrow points to the 'Fields & Relationships' tab. Another red arrow points to the 'New' button at the top right of the list table.

3. Select the data type as "Rollup summary ",and click Next.

The screenshot shows the 'Data Type' configuration screen. A red arrow points to the 'Roll Up Summary' option under the 'Data Type' section. The 'Next' button is highlighted with a red arrow.

4. Give the Field label as " sum of rice distributed ",Field Name will be Auto generated, and click Next.

The screenshot shows the 'New Custom Field' configuration page. At the top, it says 'Step 2. Enter the details' and 'Step 2 of 5'. The 'Field Label' is set to 'sum of rice distributed'. The 'Field Name' is 'sum_of_rice_distributed'. The 'Description' is 'the total amount of rice distributed to customer or shopowner'. The 'Help Text' field is empty. Below these fields is a checkbox 'Auto add to custom report type' which is checked, and another checkbox 'Add this field to existing custom report types that contain this entity' which is also checked. At the bottom right are 'Previous', 'Next', and 'Cancel' buttons.

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

The screenshot shows the 'Step 3. Define the summary calculation' screen. It has sections for 'Select Object to Summarize' (Master Object: seller, Summarized Object: rice details), 'Select Roll-Up Type' (SUM selected, MIN, MAX, COUNT options available, and 'rice distributed' selected for 'Field to Aggregate'), and 'Filter Criteria' (radio button selected for 'All records should be included in the calculation'). At the bottom right are 'Previous', 'Next', and 'Cancel' buttons.

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

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

The screenshot shows the Salesforce Lightning setup interface. The user is in the 'Object Manager' for the 'supplier' object, specifically viewing the 'Fields & Relationships' section. A custom field named 'sum of rice distributed' has been created. The 'Field Information' section shows the following details:

- Field Label:** sum of rice distributed
- Field Name:** sum_of_rice_distributed
- API Name:** sum_of_rice_distributed__c
- Description:** (empty)
- Help Text:** (empty)
- Data Owner:** (empty)
- Field Usage:** (empty)
- Data Sensitivity Level:** (empty)
- Compliance Categorization:** (empty)
- Created By:** Chocoari Vamshi Krishna 04/06/2024, 1:27 pm
- Modified By:** Chocoari Vamshi Krishna 04/06/2024, 1:27 pm
- Object Name:** supplier

The 'Roll-Up Summary Options' section shows:

- Data Type:** Roll-Up Summary
- Summarized Object:** rice_details
- Field to Aggregate:** rice_details:rice_distributed
- Filter Criteria:** (empty)
- Summary Type:** SUM

Task 14:

Creating Fields in Objects

Creating the number field in rice details object

1. Go to the setup page >> click on object manager >> From drop down click edit for rice details object.
2. Click on fields & relationship >> click on New.

The screenshot shows the Salesforce Object Manager interface for the 'Supplier' object. The left sidebar lists various setup options like Details, Page Layouts, and Field Sets. The main area is titled 'Fields & Relationships' with a sub-header '5 Items, Sorted by Field Label'. It displays five existing fields: 'Created By', 'Last Modified By', 'Owner', 'Sum of Fuel supplied', and 'supplier Name'. The 'New' button in the top right is highlighted with a red box and an arrow pointing to it.

3. Select Data type as "number" and click Next.
4. Given the Field Label as " supplier name " and length as " 5

The screenshot shows the 'Step 2. Enter the details' screen for creating a new field. The 'Field Label' input field is highlighted with a red box and an arrow pointing to it. Below it, a note says 'Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to *12345678.90*.' The 'Length' input field is highlighted with a red box and an arrow pointing to it. To its right, the 'Decimal Places' input field is shown with a value of '0'. At the bottom, there are several checkboxes: 'Required', 'Unique', 'External ID', 'AI Prediction', and 'Auto add to custom report type'. The 'Auto add to custom report type' checkbox is checked and highlighted with a red box and an arrow pointing to it. The 'Next' button in the top right is highlighted with a red box and an arrow pointing to it.

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

Student - SI-3979-1 Recently V Recently V rice details Apex Trig... Developer (16) How Creating Explain Se... +

gmitc-13f-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01dL000001tUh/FieldsAndRelationships/00NdL000004CVVZ/view

Setup Home Object Manager

rice details

rice details Custom Field supplier Name

Back to rice details

Validation Rules [0]

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	supplier Name	Object Name	rice_details
Field Name	supplier_Name	Data Type	Master-Detail
API Name	supplier_Name_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Choppari Varshi Krishna, 04/08/2024, 1:22 pm	Modified By	Choppari Varshi Krishna, 04/08/2024, 1:22 pm

Master-Detail Options

Related To	supplier	Child Relationship Name	rice_details
Related List Label	rice details		
Sharing Setting	ReadWrite: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		
Reparentable Master Detail	[]		

Lookup Filter

Athletics Final result

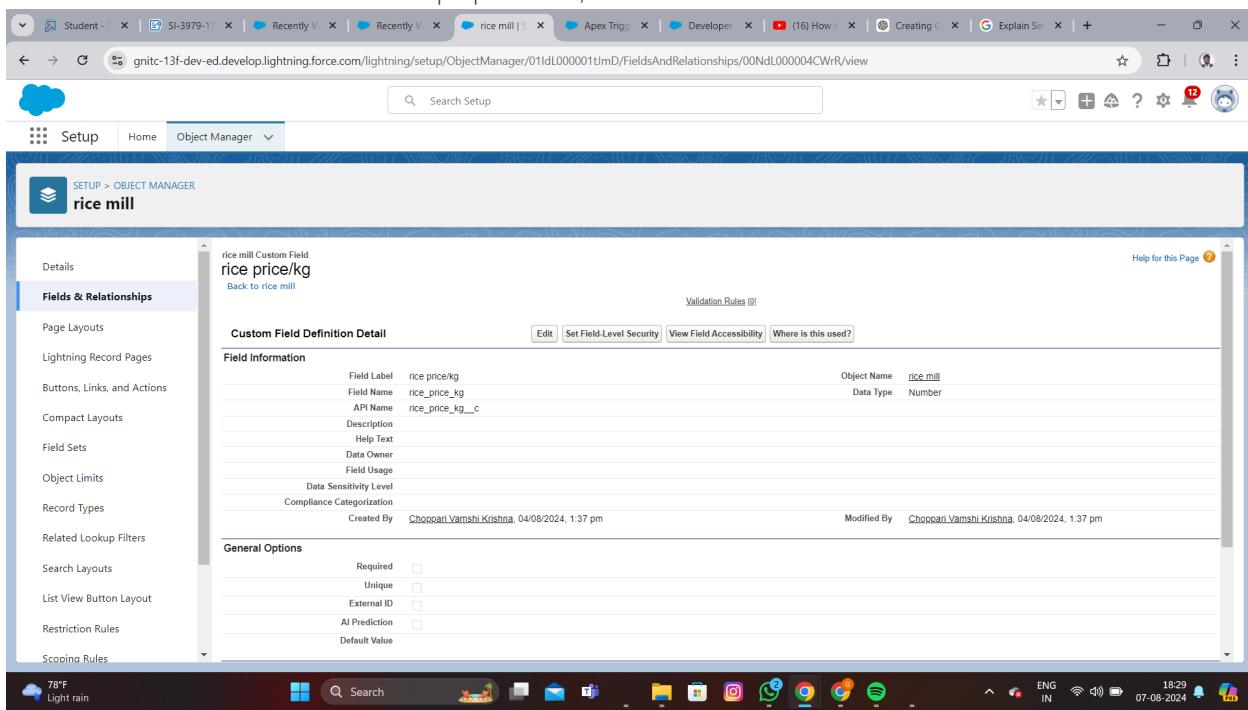
Search

ENG IN 18:27 07-08-2024

Task 15:

Creating Fields in rice mill Objects

1. Go to the setup page >> click on object manager >> From drop down click edit for rice mill object.
2. Click on fields & relationship >> click on New.
3. Select Data type as "number" and click Next.
4. Given the Field Label as "rice price/kg" length as "5
5. Field Name will be auto populated, and click on Next>> Next >> Save.



Task 16:

Creating Fields in consumer Objects

S. no	Object name	Fields	data type						
1.	consumer	<table border="1"> <tr> <td>First name</td><td>Text</td></tr> <tr> <td>Last name</td><td>Text</td></tr> <tr> <td>Phone number</td><td>phone</td></tr> </table>	First name	Text	Last name	Text	Phone number	phone	
First name	Text								
Last name	Text								
Phone number	phone								
		<table border="1"> <tr> <td>email</td><td>email</td></tr> <tr> <td>Rice taken by shops</td><td>Number (length=5)</td></tr> </table>	email	email	Rice taken by shops	Number (length=5)			
email	email								
Rice taken by shops	Number (length=5)								
		<table border="1"> <tr> <td>Rice type</td><td>(Picklist values) 1.basmati 2.normal rice</td></tr> </table>	Rice type	(Picklist values) 1.basmati 2.normal rice					
Rice type	(Picklist values) 1.basmati 2.normal rice								
		<table border="1"> <tr> <td>Mode of payment</td><td> Picklist values <ul style="list-style-type: none"> • Credit card • Debit card • Net banking • UPI • Cash </td></tr> </table>	Mode of payment	Picklist values <ul style="list-style-type: none"> • Credit card • Debit card • Net banking • UPI • Cash 					
Mode of payment	Picklist values <ul style="list-style-type: none"> • Credit card • Debit card • Net banking • UPI • Cash 								

Student - SI-3979-1 Recently consumer Apex Trigger (16) How Creating Explain Setup

gmitc-13f-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01dL000001tJsf/FieldsAndRelationships/view

Setup Home Object Manager consumer

SETUP > OBJECT MANAGER consumer

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

Fields & Relationships 14 Items, Sorted by Field Label

First name	First_name__c	Text(20)
Last Modified By	LastModifiedBy	Lookup(User)
Last name	Last_name__c	Text(20)
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(5, 0)
Rice type	Rice_type__c	Picklist

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Athletics Final result

Search

18:31 ENG IN 07-08-2024

Task 17:

Creating Cross Object Formula Field in consumer Object

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

Step 2. Choose output type Step 2 of 5

Field Label Field Name Previous Next Cancel

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

Formula Return Type

None Selected Select one of the data types below.

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

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

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

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

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

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

5. Insert fields formula should be :
`rice_taken_by_shops_c * rice_mill_name_r.rice_price_kg_c`
6. Under Advanced Formula write down the formula and click “Check Syntax” and Save.

Simple Formula Advanced Formula

Insert Field Insert Operator Functions

-- All Function Categories --

amount paid (Number) =

```
rice_taken_by_shops_c * rice_mill_name_r.rice_price_kg_c
```

ABS ACOS ADDMONTHS AND ASCII ASIN

Insert Selected Function

Check Syntax No syntax errors in merge fields or functions. (Compiled size: 67 characters)

- Creating the Formula field in consumer Object

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

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

8.

Simple Formula Advanced Formula

Insert Field Insert Operator Functions

-- All Function Categories --

amount paid (Number) =

```
rice_taken_by_shops_c * rice_mill_name_r.rice_price_kg_c
```

ABS ACOS ADDMONTHS AND ASCII ASIN

Insert Selected Function

Check Syntax No syntax errors in merge fields or functions. (Compiled size: 67 characters)

Student - x | SI-3079-17 x | Recently V x | Recently V x | consumer x | Apex Trig x | Developer x | (16) How x | Creating x | Explain Se x | +

gnitc-13f-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IdL000001tJsf/FieldsAndRelationships/00NdL000004F5sv/view

The screenshot shows the Salesforce Setup interface. The top navigation bar includes links for Student, SI-3079-17, Recently Viewed, consumer, Apex Trigger, Developer, (16) How To, Creating, Explain, and a plus sign. The address bar shows the URL for the custom field 'Amount Paid' in the Object Manager for the 'consumer' object.

The main area displays the 'Amount Paid' custom field details. The field is labeled 'Amount Paid' and has the API name 'Amount_Paid__c'. It is defined as a formula type with 2 decimal places, using the formula: `Rice_taken_by_shops__c * rice_mil_name__c * rice_price_kg__c`. The field is associated with the 'consumer' object. The creation and modification details show they were performed by 'Choppari Vamshi Krishna' on 05/08/2024 at 7:12 pm and 06/08/2024 at 10:42 am respectively.

On the left sidebar, under 'Fields & Relationships', other options like Details, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules are listed.

The bottom of the screen shows the Windows taskbar with icons for File Explorer, Search, Task View, Mail, OneDrive, Edge, Google Chrome, Spotify, and others. The system tray indicates it's 18:32 IN 07-08-2024, with battery level at 78% and a light rain weather icon.

Task 18:

Creating the validation rule

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

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various object configuration options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Validation Rules' and shows one item: 'phonenumeroremailblankrule'. The table columns are RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, and MODIFIED BY. The row for the validation rule has 'phonenumeroremailblankrule' in the RULE NAME column, 'Top of Page' in the ERROR LOCATION column, 'please fill phone number' in the ERROR MESSAGE column, an unchecked checkbox in the ACTIVE column, and 'udayrishi yelagandula, 05/07/2023, 12:57 pm' in the MODIFIED BY column. A 'New' button is visible in the top right corner of the list area.

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

The screenshot shows the 'Validation Rule Edit' dialog box. The 'Rule Name' field contains 'phonenumeroremailblankrule'. The 'Active' checkbox is checked. The 'Description' field contains 'phone number and email should not be blank'. On the right, there is a 'Quick Tips' section with a link to 'Operators & Functions'. Below the description, there is an 'Error Condition Formula' section. The formula input field contains 'OR(ISBLANK(phone_number__c) , ISBLANK(email__c))'. To the right of the formula, a function dropdown menu is open, showing options like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. A tooltip for the ABS function is displayed, stating 'Returns the absolute value of a number, a number without its sign'. At the bottom of the dialog, there is a 'Check Syntax' button and a message 'No errors found'.

- 6.
7. Under the error message write as "please fill in your phone number."
8. Select error location "top of page".

Insert Field | Insert Operator ▾

```
OR( ISBLANK( phone_number__c ), ISBLANK( email__c ) )
```

ACOS
ADDMONTHS
AND
ASCII
ASIN

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

Check Syntax

Error Message

Example: Discount percent cannot exceed 30%

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

Error Message

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

Error Location Top of Page Field

Save **Save & New** **Cancel**

9.

10. Save the validation rule.

The screenshot shows the Salesforce Setup interface for the consumer object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the 'consumer Validation Rule' detail page. The validation rule has the following details:

- Rule Name:** Phonenumberemailblankrule
- 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:** Choppari Vamshi Krishna, 05/08/2024, 7:16 pm
- Modified By:** Choppari Vamshi Krishna, 05/08/2024, 7:16 pm
- Active:** checked
- Error Location:** Top of Page

The browser address bar shows the URL: gnttc-13f-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01dL000001tJsf/ValidationRules/03ddL000002u2HjQAY/view

Task 19:

creating the page layout

To Create a Page layout:

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

The screenshot shows the Salesforce Object Manager for the 'consumer' object. The left sidebar has a 'Page Layouts' section selected. The main area displays a table titled 'Page Layouts' with two items: 'customer Layout' and 'personal details'. The table includes columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. A 'Quick Find' search bar and 'New' and 'Page Layout Assignment' buttons are at the top right of the list view.

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

3. Select the existing page layout, and give the page layout name as "consumer layout", and click save.

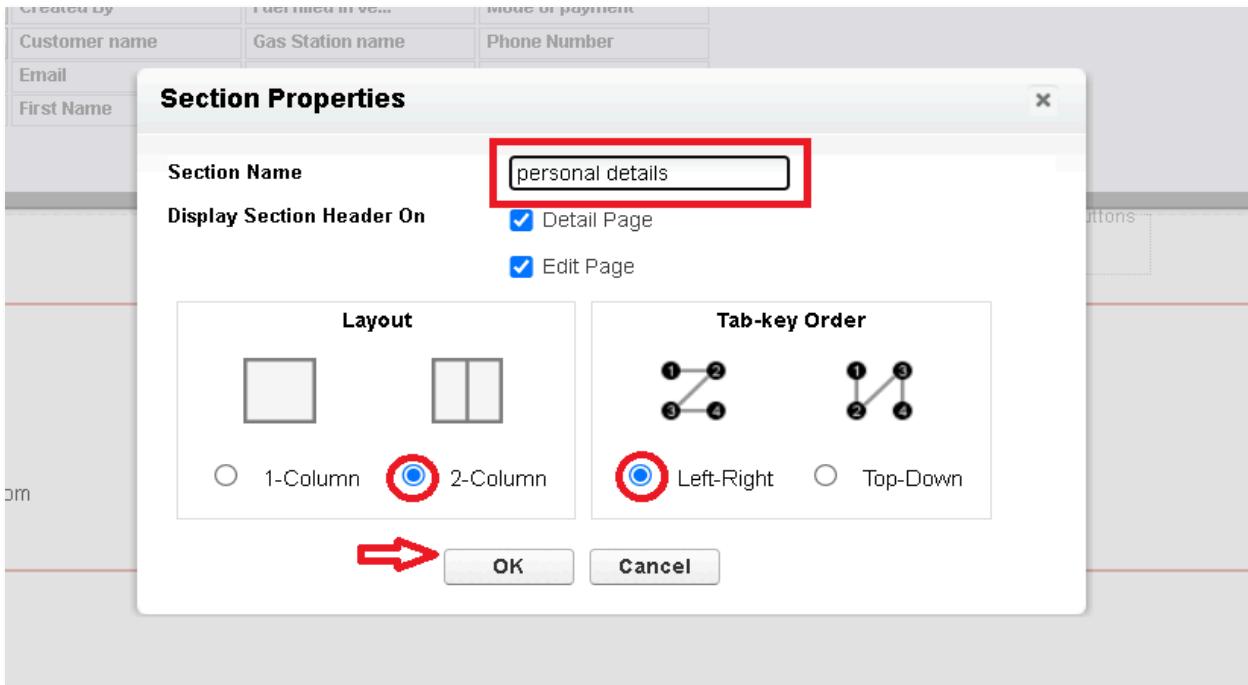
The screenshot shows the 'Create New Page Layout' dialog box. It has a note about cloning layouts. The 'Existing Page Layout' dropdown is set to 'custom page' and the 'Page Layout Name' input field contains 'customer layout'. A red arrow points to the 'Save' button at the bottom.

As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names are translated for your international users.

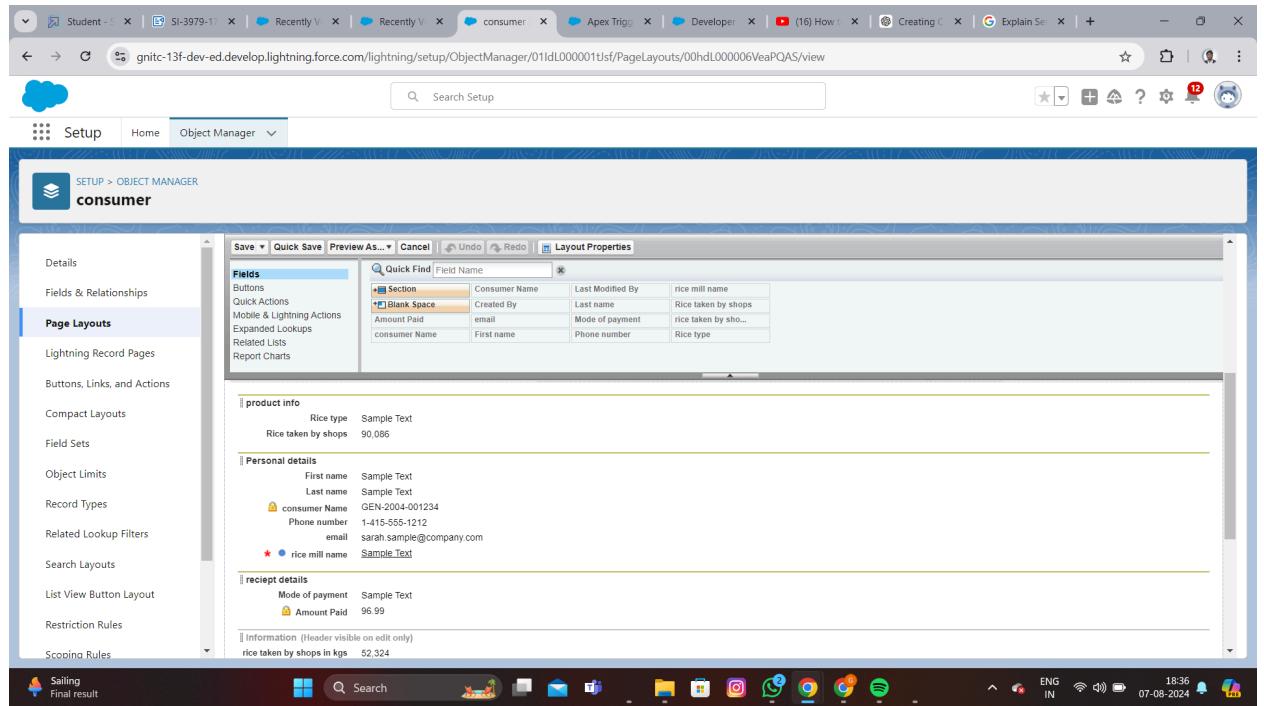
Existing Page Layout: custom page
Page Layout Name: customer layout

Save Cancel

- 4.
5. Drag and drop the section field to consumer details and create the section.
6. Enter the section name as "Personal details", - click Ok.



7. Now drag the fields to this section that mentioned , they are
 - First name , last name , consumer name , phone number, email, rice mill name.
8. Follow the same process for another two sections as shown above , they are
9. One section is “ rice details ” , drag the fields that are
 - Rice taken by shop, rice type.
10. Another section is “Receipt details ”, and drag the fields that are
 - Mode of payment , Amount paid.
11. Then Click Save.



Task 20:

owner Profile

To create a new profile:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (owner) >> Save.

2.

Name	owner	User License	Salesforce	Description		Created By	udayrishi.yelagandula, 10/07/2023, 10:56 am	Modified By	udayrishi.yelagandula, 10/07/2023, 10:56 am
Page Layouts									
Standard Object Layouts									
Global	Global Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]						
Email Application	Not Assigned [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]						
Home Page Layout	DE Default [View Assignment]	Opportunity	Opportunity Layout [View Assignment]						
Account	Account Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]						
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Order	Order Layout [View Assignment]						
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Order Product	Order Product Layout [View Assignment]						

3. Click on Edit >> 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.

The screenshot shows the Salesforce Setup - Profiles page. In the search bar, 'prof' is typed. The 'Profiles' tab is selected under the 'Users' category. The main area displays 'Custom Object Permissions' for several objects:

Object	Basic Access					Data Administration	
	Read	Create	Edit	Delete	View All	Modify All	
consumers	✓	✓	✓	✓	✓	✓	
rice details	✓	✓	✓	✓	✓	✓	
rice mills	✓	✓	✓	✓	✓	✓	
supplier	✓	✓	✓	✓	✓	✓	

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.

4. Click on Edit >> Scroll down to Custom Object Permissions and Give access and save it.

Task 21:

employer Profile

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

The screenshot shows the Salesforce 'Profiles' page under the 'SETUP' tab. It displays two permission matrices side-by-side. The left matrix is for 'Basic Access' and the right matrix is for 'Data Administration'. Both matrices have columns for 'Read', 'Create', 'Edit', 'Delete', 'View All', and 'Modify All'. The rows represent various objects: Assets, Asset Services, books, Brokers, consumers, Employees, energy audits, item details, nick names, positions, Projects, ProjectTasks, Properties, purchasers, reviews, rice details, rice mills, SolarBots, SolarBot Status, studs, students, super marts, suppliers, teachers, tickets, and vendors. In the 'Basic Access' matrix, 'consumers' has checked boxes for 'Create', 'Edit', 'Delete', 'View All', and 'Modify All'. In the 'Data Administration' matrix, 'rice details' and 'rice mills' have checked boxes for 'View All' and 'Modify All'.

	Basic Access						Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Asset Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Brokers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
consumers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
energy audits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
item details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
nick names	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
positions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
ProjectTasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Properties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
purchasers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
reviews	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
rice details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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"/>						
SolarBots	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
SolarBot Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
stud	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
student	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
super mart	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
suppliers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
teacher	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
ticket	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
vendor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						

5. And click save.

SI-3979-172 | Recently Viewed | Profiles | Sales | Apex Trigger | Developer | (16) How to | Creating Con | Explain Serv | +

gnitc-13f-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edL000005RsCJ

The screenshot shows the Salesforce Setup Profiles page. On the left, there's a sidebar with a search bar and a 'Users' section containing a 'Profiles' tab. A message says 'Didn't find what you're looking for? Try using Global Search.' Below the sidebar is a large table titled 'Profiles' showing permissions for various objects like Business Brands, Ideas, and Labels. Under 'Custom Object Permissions', there are two tables for 'consumers' and 'rice details'. At the bottom, there are 'Session Settings' and 'Password Policies' sections.

Business Brands ✓ ✓ ✓ ✓ □ □ Ideas ✓ ✓

Communication Subscriptions ✓ ✓ ✓ ✓ □ □ Individuals ✓ ✓ ✓ ✓ □ □

Communication Subscription Channel Types ✓ ✓ ✓ ✓ □ □ Labels ✓ ✓ ✓ ✓ □ □

Communication Subscription Consents ✓ ✓ ✓ ✓ □ □ Locations □ □

Communication Subscription Timings ✓ ✓ ✓ ✓ □ □ Party Consents ✓ □ ✓ □ □ □

Contacts ✓ ✓ ✓ ✓ □ □ Push Topics ✓ ✓ ✓ ✓ □ □

Contact Point Addresses □ □ □ □ □ □ Sellers ✓ ✓ ✓ ✓ □ □

Contact Point Consents ✓ ✓ ✓ ✓ □ □ Streaming Channels ✓ ✓ ✓ ✓ □ □

Contact Point Emails ✓ ✓ ✓ ✓ □ □ User External Credentials □ □ □ □ □

Custom Object Permissions

	Basic Access						Data Administration						
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
consumers	✓	□	□	□	□	□	rice mills	✓	□	□	□	□	□
rice details	✓	□	□	□	□	□	supplier	✓	□	✓	□	□	□

Session Settings
Session Times Out After: 2 hours of inactivity Session Security Level Required at Login

User passwords expire in: 90 days

Task 22:

worker Profile

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

The screenshot shows the Salesforce Setup Profiles page. At the top, there are two tabs: 'Basic Access' and 'Data Administration'. Below each tab is a matrix table with rows for various objects and columns for permissions: Read, Create, Edit, Delete, View All, and Modify All. The 'Basic Access' matrix covers objects like Assets, Asset Services, books, Brokers, consumers, Employees, energy audits, item details, nick names, positions, and Projects. The 'Data Administration' matrix covers objects like purchasers, reviews, rice details, rice mills, SolarBots, SolarBot Status, studs, students, super marts, suppliers, teachers, and tickets. In the 'Data Administration' matrix, checkboxes are checked for 'View All' and 'Modify All' for the 'rice details' and 'rice mills' objects.

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

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

5. And click save.

SI-3979-172 | Recently Viewed | Profiles | Sales | Apex Trigger | Developer | (16) How to | Creating Con | Explain Serv | +

gnitc-13f-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edL000005RsXh

The screenshot shows the Salesforce Setup interface under the Profiles section. A search bar at the top right contains "Search Setup". Below it, a navigation bar includes "Setup", "Home", and "Object Manager". A sidebar on the left lists "Users" and "Profiles". A message says "Didn't find what you're looking for? Try using Global Search." The main content area displays a large grid of permissions for various objects. The columns include Business Brands, Ideas, Communication Subscriptions, Individuals, Labels, Locations, Party Consents, Push Topics, Sellers, Streaming Channels, User External Credentials, and Contact Point Addresses, Contact Point Consents, Contact Point Emails. Each object has a row of checkboxes indicating permission levels (Read, Create, Edit, Delete, View All, Modify All). Below the grid, sections for "Custom Object Permissions" and "Session Settings" are shown. The "Custom Object Permissions" section includes tables for "consumers" and "rice details" with their respective permission levels. The "Session Settings" section shows a session timeout of "2 hours of inactivity" and a "Session Security Level Required at Login". At the bottom, a status bar shows "USD/JPY +1.88%", a search bar, and system icons.

Task 23:

Creating owner Role

Creating owner Role:

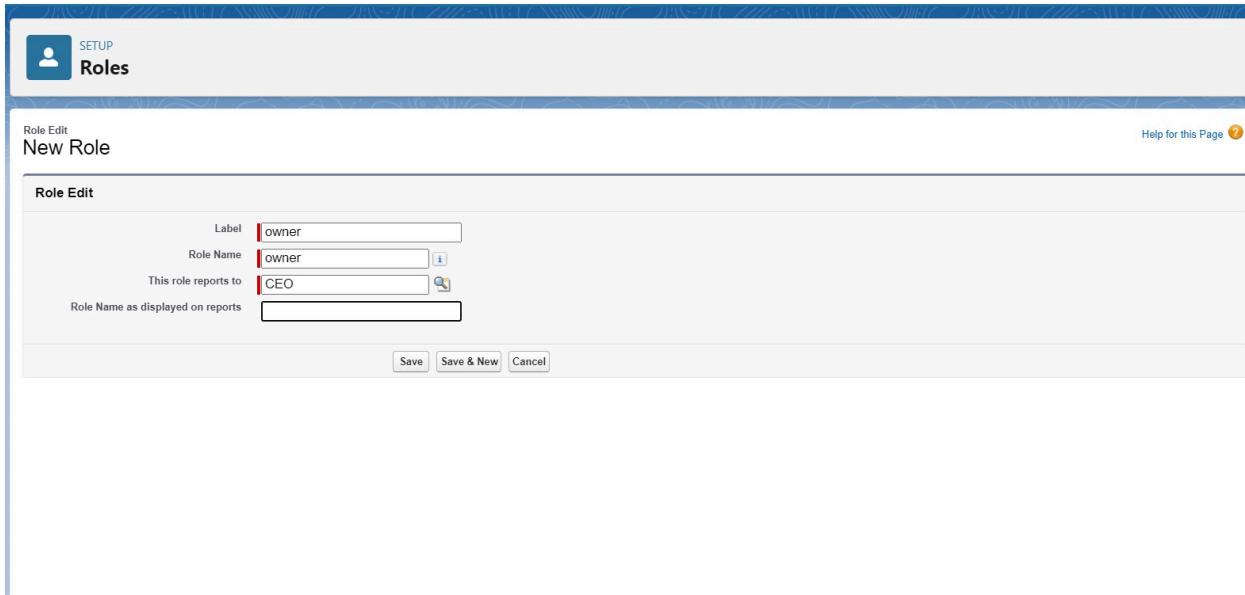
1. Go to quick find >> Search for Roles >> click on set up roles.
2. Go to quick find >> Search for Roles >> click on set up roles.

The screenshot shows the Salesforce Setup interface for Roles. The left sidebar has a search bar and a navigation tree with sections like Users, Feature Settings, Sales, Service, and Case Teams. Under 'Users', 'Roles' is selected and highlighted with a red box. The main content area shows a 'Sample Role Hierarchy' diagram. At the top is 'Executive Staff' with 'CEO' and 'President' below it. 'President' has 'CFO' and 'VP Sales' as children. 'VP Sales' has three regional directors: 'Western Sales Director', 'Eastern Sales Director', and 'International Sales Director'. Each director oversees several sales rep roles (e.g., 'West Sales Rep', 'East Sales Rep', 'Asia Sales Rep', 'Europe Sales Rep'). A legend explains the hierarchy levels: 'View & edit data, roll up forecasts, & access reports for all users below' (top level), 'View & edit data, roll up forecasts, & access reports only for own data' (middle level), and 'Can't access data from users above or at same level' (bottom level). At the bottom right of the content area is a 'Set Up Roles' button, also highlighted with a red box.

3. Click on Expand All and click on add role under whom this role works.

The screenshot shows the 'Your Organization's Role Hierarchy' page. The top has a 'Collapse All' and 'Expand All' button, with 'Expand All' highlighted with a red box. The tree view shows 'Nick Enterprises' expanded, with its children 'Add Role', 'CEO', 'HR', 'Manager', 'On Site Emp', and 'Remote Emp'. Each of these nodes has its own 'Edit | Del | Assign' buttons and an 'Add Role' button, which are all highlighted with red boxes. The 'Add Role' buttons are located at the end of each node's branch.

4. Give Label as "owner" and Role name gets auto populated. Then click on Save.



5. Click and save it.

Role Detail

Action	Full Name	Alias	Username	Active
Edit	vicky.y	VY	chopparvamshi48@78545@gmail.com	<input checked="" type="checkbox"/>

Task 24:

Creating employer roles

Creating another two roles under manager

1. Go to quick find >>Search for Roles >>click on set up roles.
2. Click plus on CEO role, and click add role under owner.

The screenshot shows the 'Your Organization's Role Hierarchy' page. At the top, there are buttons for 'Collapse All' and 'Expand All'. Below this, the tree view starts with 'smartbridge' which contains several roles: 'CEO', 'CFO', 'COO', 'HR', 'owner', 'SVP.Customer Service & Support', 'SVP.Human Resources', and 'SVP.Sales & Marketing'. Each role has an 'Add Role' button to its right. The 'owner' role is currently selected, as indicated by a black underline. At the bottom right of the page, there is a 'Show in tree view' dropdown menu and a 'Help for this Page' link.

4. Give Label as “employer” and Role name gets auto populated. Then click on Save.

The screenshot shows the Salesforce Setup Roles page. On the left, there's a sidebar with 'Users' expanded, showing 'Roles' selected. The main area displays the 'Role employer' details. It includes a 'Role Detail' section with fields like 'Label' (employer), 'This role reports to' (owner), 'Modified By' (ChoppuriVamshi Krishna), 'Opportunity Access' (Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities), and 'Case Access' (Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases). Below this is a table titled 'Users in employer Role' with one row for 'ram'. At the bottom right of the main area, there's a link 'Users in employer Role Help'.

5. Repeat the same steps, for another role.
6. Click plus on CEO role, and click plus on owner, and click add role under employer.

The screenshot shows a hierarchical list of roles in the Salesforce Setup Roles page. The tree structure includes:

- Manager**: Edit | Del | Assign
 - On Site Employee**: Edit | Del | Assign
 - Remote Employee**: Edit | Del | Assign
 - Add Role**
- owner**: Edit | Del | Assign
 - employer**: Edit | Del | Assign
 - Add Role**
- SVP_Customer Service & Support**: Edit | Del | Assign
 - Customer Support_International**: Edit | Del | Assign
 - Add Role**
 - Customer Support_North America**: Edit | Del | Assign
 - Add Role**
 - Installation & Repair Services**: Edit | Del | Assign
 - Add Role**
- SVP_Human Resources**: Edit | Del | Assign
 - Add Role**
- SVP_Sales & Marketing**: Edit | Del | Assign
 - VP_International Sales**: Edit | Del | Assign
 - Add Role**
 - VP_Marketing**: Edit | Del | Assign
 - Add Role**

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

SI-3979-172 | Recently Viewed | Roles | Sales | Apex Trigger | Developer Con | (16) How to | Creating Con | Explain Servic

gnitc-13f-dev-ed.lightning.force.com/lightning/setup/Roles/page?address=%2F00EdL000005IMaH%3Fsetupid%3DRoles

Setup Home Object Manager

roles

Users Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

Role worker

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: gnitc > CEO > owner > employer > worker

Role Detail

	Label	worker	Role Name as displayed on reports	Role Name	worker
This role reports to	employer			Sharing Groups	Role, Role and Internal Subordinates
Modified By	Choppuri Vamshi Krishna	05/08/2024, 7:52 pm			
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities				
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases				

Users in worker Role

Action	Full Name	Alias	Username	Active
Edit	(agula)	(a)	choppuriyamshi48@89756@gmail.com	✓

Help for this Page

Did you find what you're looking for?
Try using Global Search.

Sunset 7:16 PM

Search

File Explorer Mail Microsoft Edge Task View Spotify Google Chrome Spotify

18:43
ENG IN 07-08-2024

Task 25:

Create User

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

The screenshot shows the Salesforce 'User Edit' page under the 'Users' tab in the 'SETUP' section. The page title is 'User Edit' and the record name is 'vicky y'. The 'General Information' section contains the following field values:

Field	Value
First Name	vicky
Last Name	y
Alias	vy
Email	ramesh0820@gmail.com
Username	ramesh0820@754123gmail
Nickname	vicky
Title	(empty)
Company	(empty)
Department	(empty)
Division	(empty)

On the right side, the 'Role' is set to 'owner'. Under 'User License', 'Salesforce' is selected. The 'Profile' is also set to 'owner'. The 'Active' checkbox is checked. A legend indicates that red boxes and asterisks (*) denote required information. Other optional checkboxes include Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type (set to '--None--'), and Data.com Monthly Addition Limit (set to 300).

12. Save it.

SI-3979-172 | Recently Viewed | Recently Viewed | Users | Sales | Apex Trigger | Developer | (16) How to | Creating Con | Explain Serv | +

gnitc-13f-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005dL0000063ld%3Fnoredirect%3D1%26isUserEntityOverride%3D1

Setup Home Object Manager

Search Setup

Users

User vicky y

User Detail

Name	vicky y	Role	owner
Alias	vy	User License	Salesforce
Email	choppavamshi48@gmail.com [Verify] [i]	Profile	owner
Username	choppavamshi48@78545gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	vicky [i]	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	house number 42-103/B, Wanaparthi, Sai Nagar Colony Wanaparthi Mahabubnagar Telangana India, 509103 547	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 [i]
Delegated Approver		Data.com User Type	[i]
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> [i]

User Profile Help for this Page [\[i\]](#)

Didnt find what you're looking for?
Try using Global Search.

78°F Light rain

Search

18:44 07-08-2024 ENG IN

Task 26:

creating another users

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

The screenshot shows the Salesforce Setup interface. The left sidebar is collapsed, and the main area displays the 'Users' setup page. A search bar at the top right contains the text 'Search Setup'. The main content area is titled 'Users' and shows a user record for 'ram ram'. The 'User Detail' section includes fields for Name (ram ram), Alias (ram), Email (chopparivamshi48@gmail.com), Username (chopparivamshi48@s46448@gmail.com), Nickname (ram), and various roles like 'Employer' and 'Salesforce Platform'. The 'Sharing' tab is selected, and the 'Edit' button is visible. The bottom of the screen shows the Windows taskbar with various application icons.

Task 27:

Create Another User

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

The screenshot shows the Salesforce Setup interface with the 'Users' page open. The user 'ragu raj' is being created. The 'User Detail' section displays the following information:

Field	Value
Name	ragu raj
Alias	rraj
Email	chopparivamshi45@gmail.com [Verify]
Username	chopparivamshi45@89756@gmail.com
Nickname	ragu
Title	
Company	
Department	
Division	
Address	house number 42-109/B, Wanaparthy, Sai Nagar Colony Wanaparthy Mahabubnagar Telangana India, 509163 547 India
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	
Manager	
Role	worker
User License	Salesforce Platform
Profile	Standard Platform User
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	<input type="checkbox"/> View
Data.com User Type	<input type="checkbox"/> [Info]
Accessibility Mode (Classic Only)	<input type="checkbox"/>

Task 28:

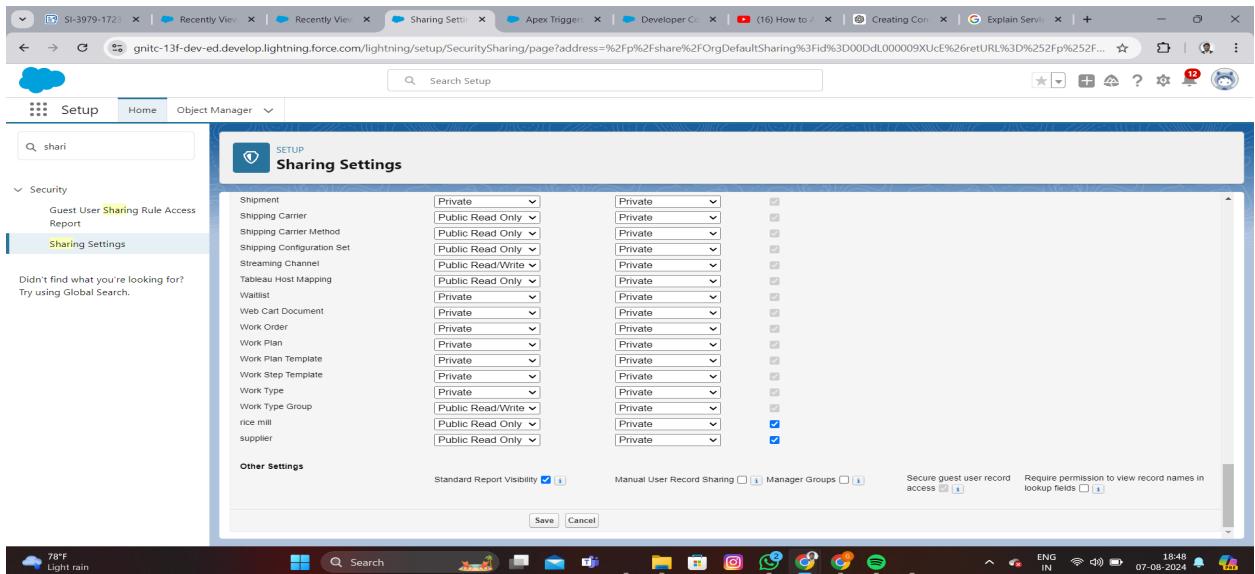
Creating OWD setting.

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

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup interface. The left sidebar has a search bar with 'sharing' typed in. Below it, under 'Security', there are links for 'Guest User Sharing Rule Access Report' and 'Sharing Settings'. The 'Sharing Settings' link is highlighted with a red arrow. The main content area is titled 'Sharing Settings' and contains a table for 'Default Sharing Settings'. The first section is 'Organization-Wide Defaults', which includes a 'Manage sharing settings for:' dropdown set to 'All Objects' and a 'Disable External Sharing Model' button. The table has columns for 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. The 'Edit' button in the first row of the table is highlighted with a red box. The table data is as follows:

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

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



Task 29:

Create Report

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

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

To create Records : Click on consumers tab >> click on New >> Enter the details and click on Save.

Repeat these steps to create "10" records.

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

2. Click

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

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

Report Type Name	Category
rice mills with consumers	Standard

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

- 1.consumer name

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

2. Remove the unnecessary fields.
3. Select the fields that are mentioned below in the GROUP ROWS section.
 1. Rice taken by shops

My Rice suppliers rice mills rice details consumers Reports

REPORT ▾ New rice mills with consumers Report **rice mills with consumers**

Fields Outline Filters 1 Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

rice taken by shops ↑	consumer: consumer name	rice type	rice price/kg	mode of payments	amount paid
8 (1)	A-0003	normal rice	50	Cash	400.00
			50		400.00
Subtotal					
10 (1)	A-0006	basmati	50	Cash	500.00
			50		500.00
Subtotal					
12 (1)	A-0007	basmati	50	Cash	600.00
			50		600.00
Subtotal					
15 (1)	A-0008	basmati	50	Cash	750.00
			50		750.00
Subtotal					
16 (1)	A-0010	normal rice	50	Cash	800.00
			50		800.00
Subtotal					
18 (1)	A-0009	normal rice	50	Cash	900.00
			50		900.00
Subtotal					
80 (1)	A-0011	basmati	50	Net banking	4,000.00
			50		4,000.00
Subtotal					
Total (11)			50		9,050.00

Row Counts Detail Rows Subtotals Grand Total

Conditional For

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

SI-3979-172 | Recently Viewed | range of amo... | Sharing Settings | Apex Trigger | Developer Console | (16) How to | Creating Con... | Explain Service | +

gnitc-13f-dev-ed.lightning.force.com/lightning/r/Report/00OdL000005Uco9UAC/view?queryScope=userFolders

MY RICE supplier rice mills consumers rice details Reports Dashboards

Report: rice mills with consumers
range of amount per day

	consumer: consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
8 (1)	consumers-001	normal rice	50	Cash	400.00
Subtotal			50		400.00
9 (1)	consumers-006	basmati	50	Net banking	450.00
Subtotal			50		450.00
10 (1)	consumers-002	basmati	50	Cash	500.00
Subtotal			50		500.00
12 (1)	consumers-003	basmati	50	Cash	600.00
Subtotal			50		600.00
13 (1)	consumers-007	-	50	UPI	650.00
Subtotal			50		650.00
15 (2)	consumers-005	normal rice	50	Cash	750.00
	consumers-010	basmati	50	Debit card	750.00
Subtotal			50		1,500.00
20 (1)	consumers-008	normal rice	50	Cash	1,000.00
Subtotal			50		1,000.00
Total (10)			50		5,650.00

Row Counts Detail Rows Subtotals Grand Total

Cloudy 78°F Search ENG IN 18:49 07-08-2024

Task 30:

Sharing report to owner

1. Click edit drop down and select subscribe option

The screenshot shows a reporting interface titled "Report: rice mills with consumers range of amount per day". The table displays data for various consumers (A-0003 to A-0011) with columns for consumer name, rice type, price/kg, mode of payment, and amount paid. A context menu is open on the right, with a blue arrow pointing to the "Subscribe" option.

	consumer: consumer name	rice type	rice price/kg	mode of payments	amount paid
Subtotal			50	Cash	400.00
Subtotal			50		400.00
Subtotal			50	Cash	500.00
Subtotal			50		500.00
Subtotal			50	Cash	600.00
Subtotal			50		600.00
Subtotal			50	Cash	750.00
Subtotal			50		750.00
Subtotal			50	Cash	800.00
Subtotal			50		800.00
Subtotal			50	Cash	900.00
Subtotal			50		900.00
Total (11)			50	Net banking	4,000.00
			50		4,000.00
			50		9,050.00

2. Follow as per below image.

The screenshot shows the "Edit Subscription" dialog. The "Frequency" section has "Daily" selected. The "Time" dropdown shows "8:00 am". The "Attachment" section has an "Attach File" button. The "Recipients" section shows "Send email to Me" and an "Edit Recipients" button. The "Run Report As" section has "Another Person" selected. At the bottom are "Cancel" and "Save" buttons.

Settings

Frequency

Daily Weekly Monthly

Time

8:00 am

Attachment

Attach File

Recipients

Send email to

Me

Edit Recipients

Run Report As

Me Another Person

Cancel Save

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

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

The screenshot shows a Gmail inbox with 1,875 messages. An email from 'Choppari Vamshi Krishna' is selected. The subject of the email is 'Report results (range of amount per day)'. The email body contains the following text:
As of 7/8/24 at 8:00 AM - Viewing as Choppari Vamshi Krishna
range of amount per day
OPEN IN SALESFORCE

Details
Filters: My rice mills, rice mill, Created Date: All time

Summary

Total Records	Total rice price/kg	Total Amount Paid
5	50	2,550.00

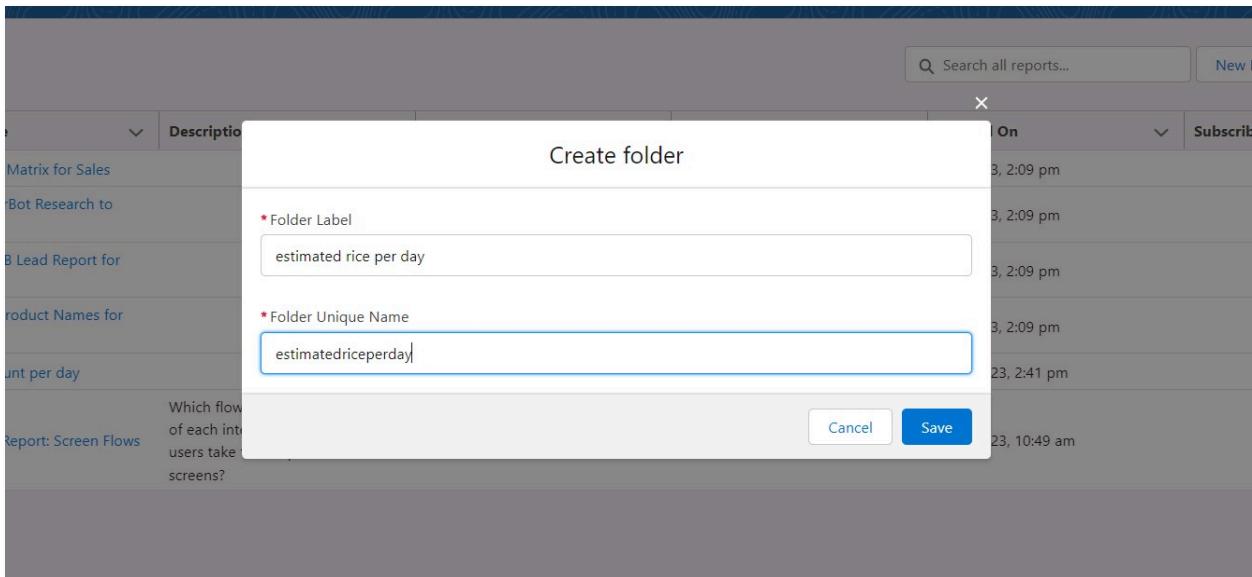
Rice taken by shops ↑	consumer: consumer Name	Rice type	rice price/kg Sum	Mode of payment	Amount Paid Sum
6	consumers-004	normal rice	50	Net banking	300.00

Message marked not suspicious.

Task 31:

create a report folder

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



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

The screenshot shows the Salesforce Reports page. On the left, there's a sidebar with categories like Reports, Folders, and Favorites. The main area displays a table of reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. One report, "range of amount per day", is selected and has a context menu open. The menu includes options like Run, Edit, Subscribe, Export, Delete, Add to Dashboard, Favorite, and Move.

	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Erin's SB Opp Matrix for Sales		Acquisition Reports	udayrushi yelagandula	5/6/2023, 2:09 pm	<input type="checkbox"/>
Created by Me	Lincoln's SolarBot Research to remove		Acquisition Reports	udayrushi yelagandula	5/6/2023, 2:09 pm	<input type="checkbox"/>
Private Reports	Marketing's SB Lead Report for Sales		Acquisition Reports	udayrushi yelagandula	5/6/2023, 2:09 pm	<input type="checkbox"/>
Public Reports	Potential SB Product Names for R&D		Acquisition Reports	udayrushi yelagandula	5/6/2023, 2:09 pm	<input type="checkbox"/>
All Reports	range of amount per day		Private Reports	udayrushi yelagandula	10/7/2023, 2:41 pm	<input type="checkbox"/>

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

This screenshot shows a modal dialog titled "Move range of amount per day". It lists "All Folders" and allows the user to search for a folder. A tree view shows the hierarchy: All Folders > Created by Me > Public Reports > estimated rice per day. The "estimated rice per day" folder is highlighted. At the bottom of the dialog are "New Folder", "Cancel", and "Select" buttons.

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

Screenshot of a web browser showing the Lightning Platform interface for managing user folders.

The URL is gnitc-13f-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=userFolders.

The page title is "Reports - All Folders".

The sidebar on the left includes:

- REPORTS
- Recent
- Created by Me
- Private Reports
- Public Reports
- All Reports
- FOLDERS
- All Folders
- Created by Me
- Shared with Me
- FAVORITES
- All Favorites

The main content area displays a table of reports and folders:

Name	Created By	Created On	Last Modified By	Last Modified Date
Einstein Bot Reports	Automated Process	4/8/2024, 11:45 am	Automated Process	4/8/2024, 11:45 am
Einstein Bot Reports Spring '23	Automated Process	4/8/2024, 11:45 am	Automated Process	4/8/2024, 11:45 am
Einstein Bot Reports Summer '23	Automated Process	4/8/2024, 11:45 am	Automated Process	4/8/2024, 11:45 am
Einstein Bot Reports Summer '22	Automated Process	4/8/2024, 11:45 am	Automated Process	4/8/2024, 11:45 am
Einstein Bot Reports Winter '23	Automated Process	4/8/2024, 11:45 am	Automated Process	4/8/2024, 11:45 am
Enablement Dashboard Reports Spring '24	Automated Process	4/8/2024, 11:45 am	Automated Process	4/8/2024, 11:45 am
Enablement Dashboard Reports Summer '24	Automated Process	4/8/2024, 11:45 am	Automated Process	4/8/2024, 11:45 am
estimated rice per day	Choppari Vamshi Krishna	6/8/2024, 10:54 am	Choppari Vamshi Krishna	6/8/2024, 10:54 am

The status bar at the bottom shows: ENG IN 18:52 07-08-2024

Screenshot of a web browser showing the Lightning Platform interface for viewing a specific report folder.

The URL is gnitc-13f-dev-ed.lightning.force.com/lightning/r/Folder/00dL000005CxhQAK/view?queryScope=userFolders.

The page title is "Reports - All Folders > estimated rice per day".

The sidebar on the left includes:

- REPORTS
- Recent
- Created by Me
- Private Reports
- Public Reports
- All Reports
- FOLDERS
- All Folders
- Created by Me
- Shared with Me
- FAVORITES
- All Favorites

The main content area displays a table of reports and folders:

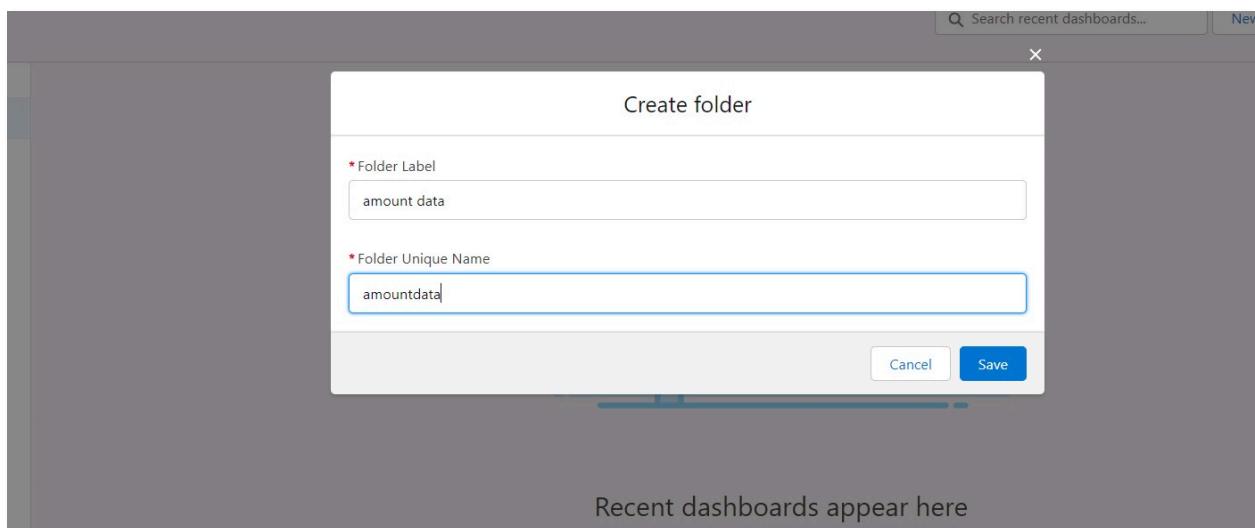
Name	Description	Folder	Created By	Created On	Subscribed
range of amount per day	estimated rice per day	estimated rice per day	Choppari Vamshi Krishna	5/8/2024, 8:28 pm	✓

The status bar at the bottom shows: ENG IN 18:52 07-08-2024

Task 32:

Create Dashboard Folder

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



6.

Recent dashboards appear here

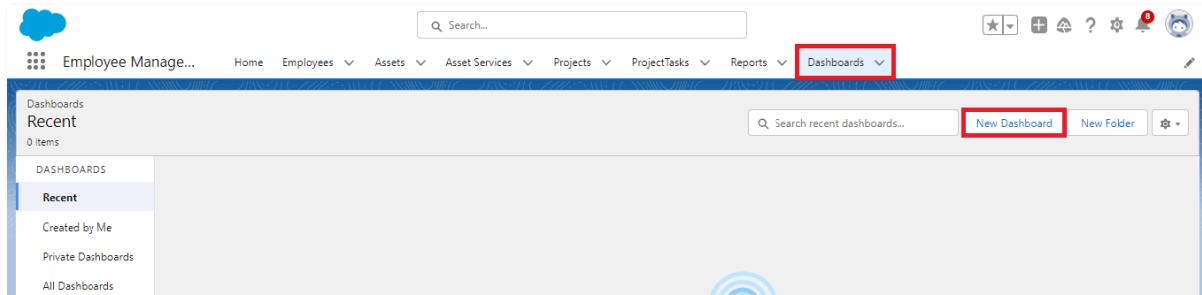
The screenshot shows the Salesforce Lightning interface. The URL in the browser is <https://gnitc-13f-dev-ed.lightning.force.com/lightning/r/Folder/00ldL000005GQN3QAO/view?queryScope=userFolders>. The page title is 'amount data dashboard'. The main content area displays a table of dashboards. The table has columns: Name, Description, Folder, Created By, and Created On. There is one item listed: 'estimated data' with a description of 'total amount of data in dashboards', created by 'Choppari Vamshi Krishna' on '7/8/2024, 2:54 pm'. The sidebar on the left shows navigation links for 'MY RICE' and categories like 'Dashboards', 'All Folders', 'Folders', 'FAVORITES', etc. The bottom of the screen shows the Windows taskbar with various icons and system status.

DASHBOARDS	Name	Description	Folder	Created By	Created On	Subscribed
Recent	estimated data	total amount of data in dashboards	amount data dashboard	Choppari Vamshi Krishna	7/8/2024, 2:54 pm	

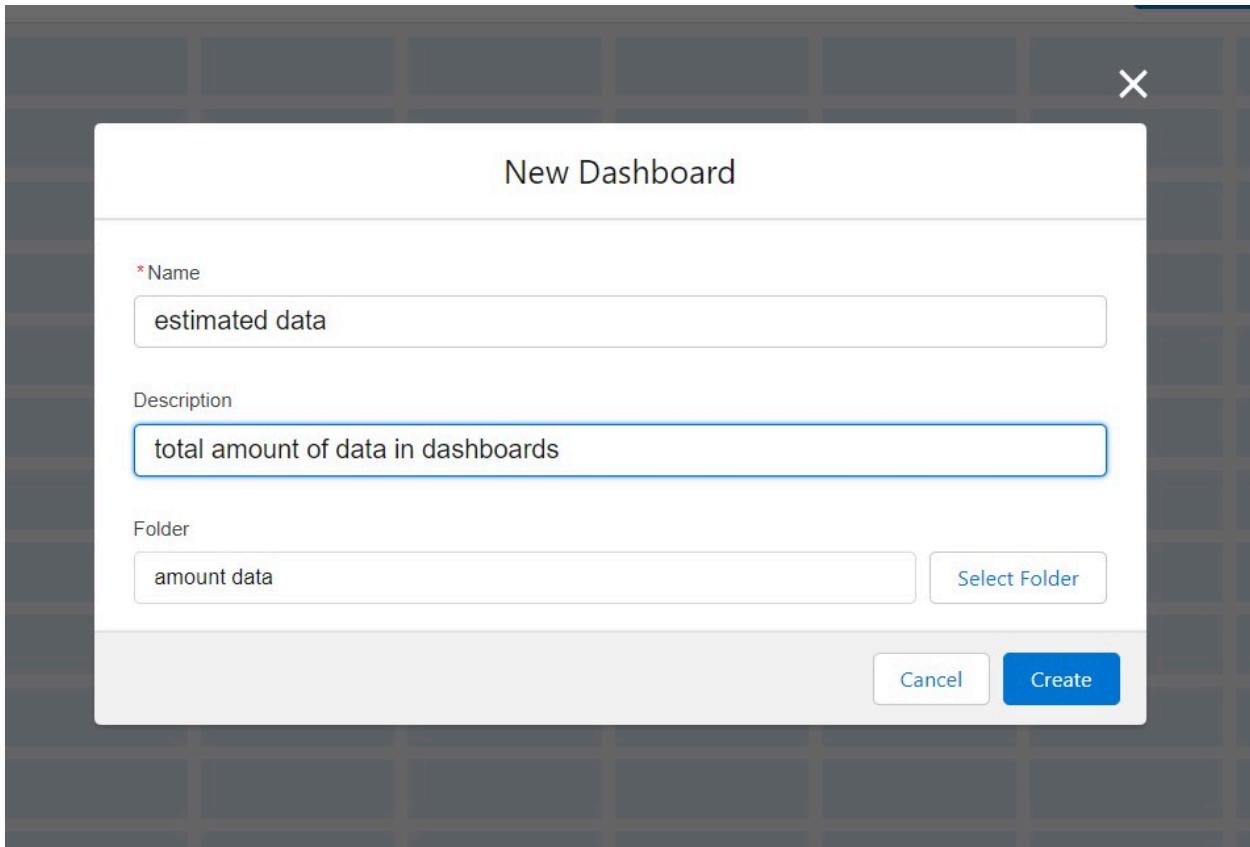
Task 33:

Create Dashboard

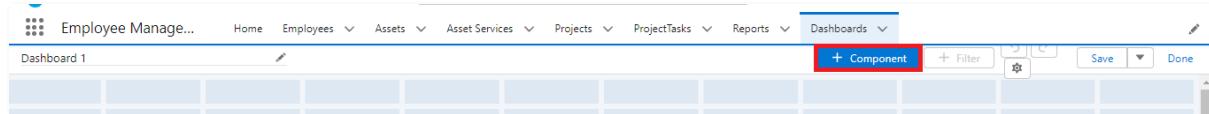
1. Go to the app >> click on the Dashboards tabs.



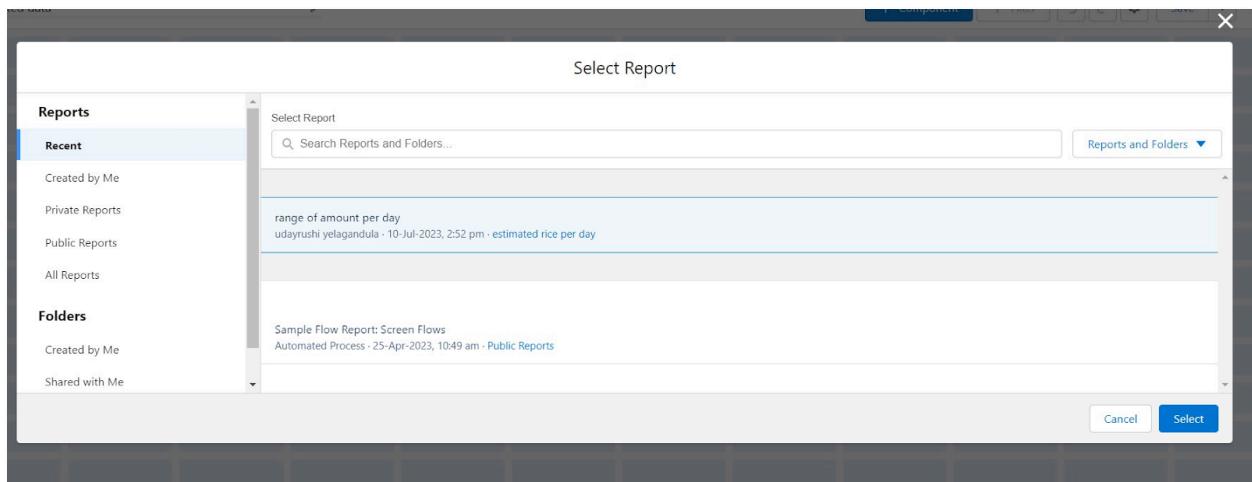
2. Give a Name and select the folder that was created, and click on create.



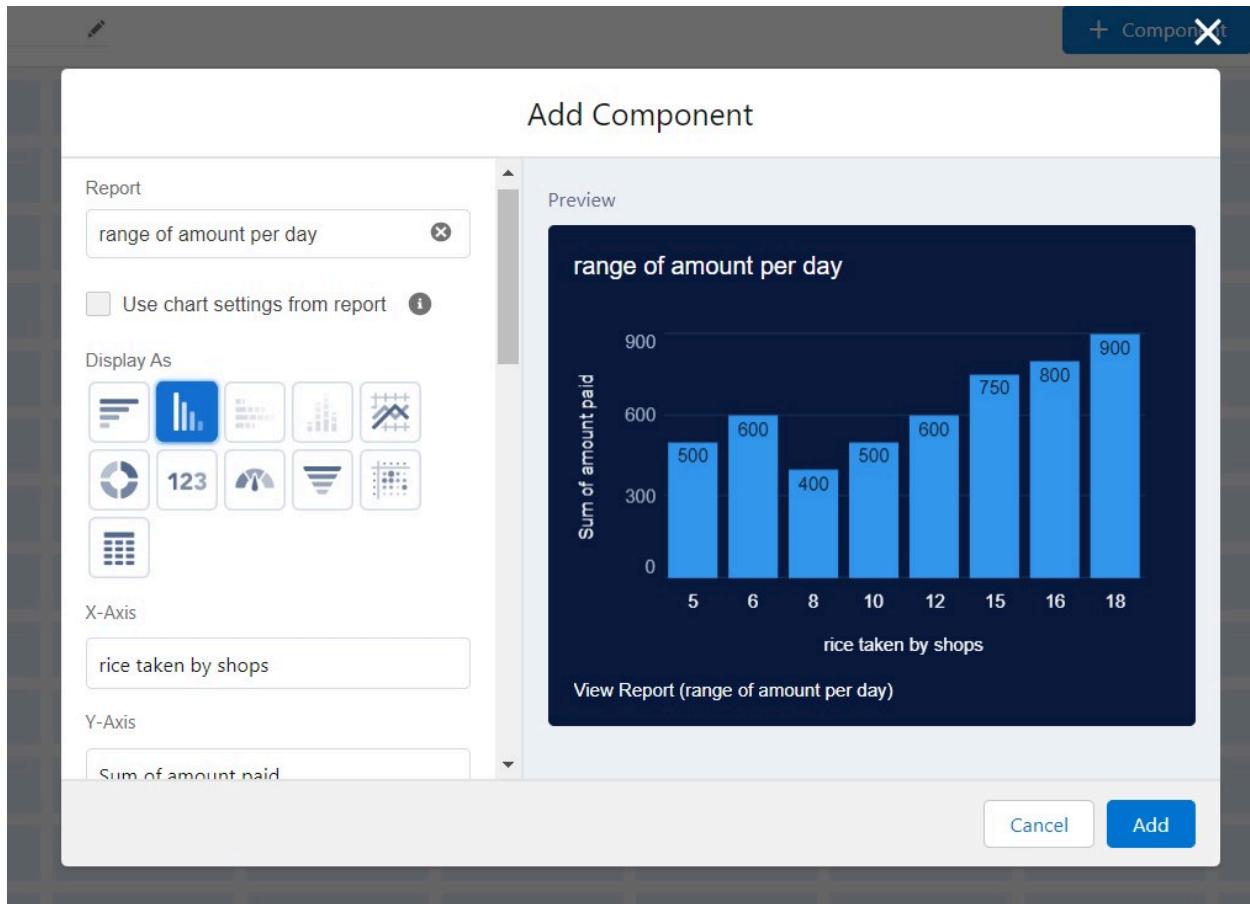
1. Select add component.



1. Select a Report and click on select.



1. Preview is shown below.



Display as>> vertical bar chart

X-axis >> rice taken by shops

Y-axis >> sum of amount

Y-axis range >> automatic

Sort by >> rice taken by shops

Component theme >> dark.

Add the component

Again select add component with above same steps

1.display as donut chart

2.sort by >> sum of amount

3.title>>range of amount per day

4.component theme dark

Value

Sum of amount paid

Sliced By

rice taken by shops

Display Units

Shortened Number

Show Values

Show Percentages

Combine Small Groups into "Others"

Show Total

Decimal Places

Automatic

Click add.

Click save and done.

Add Component

Report

range of amount per day

Use chart settings from report

Display As

Value

Sum of amount paid

Sliced By

Preview

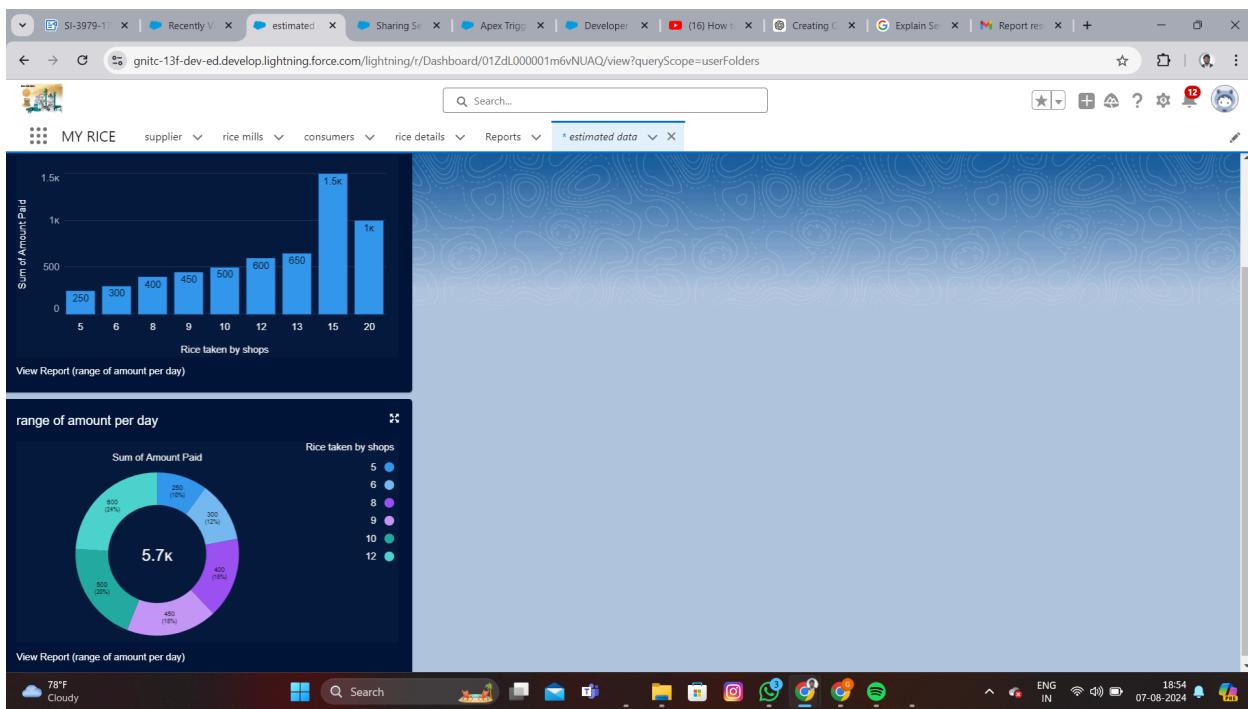
range of amount per day

Sum of amount paid

rice taken by shops

Shop Category	Value	Percentage
8	750	22.39%
5	400	11.04%
10	500	14.93%
6	500	14.93%
12	800	17.91%
15	600	17.91%

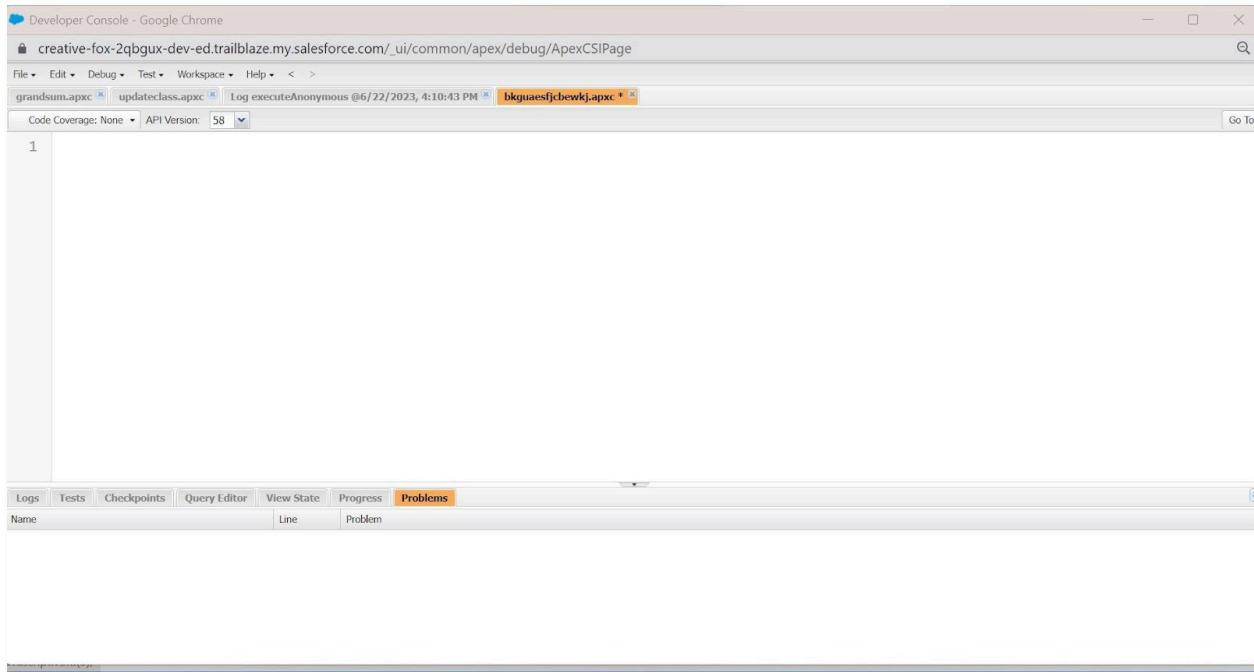
[View Report \(range of amount per day\)](#)



Task 34:

Creating an Apex Class(ConsumerRecord)

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



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

Code Snippet :

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

'We are proud to associate with valuable customers like you and we look
forward to collaborating with you by providing more and more exciting discounts or even product

```
offers too.' + '\n'
```

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

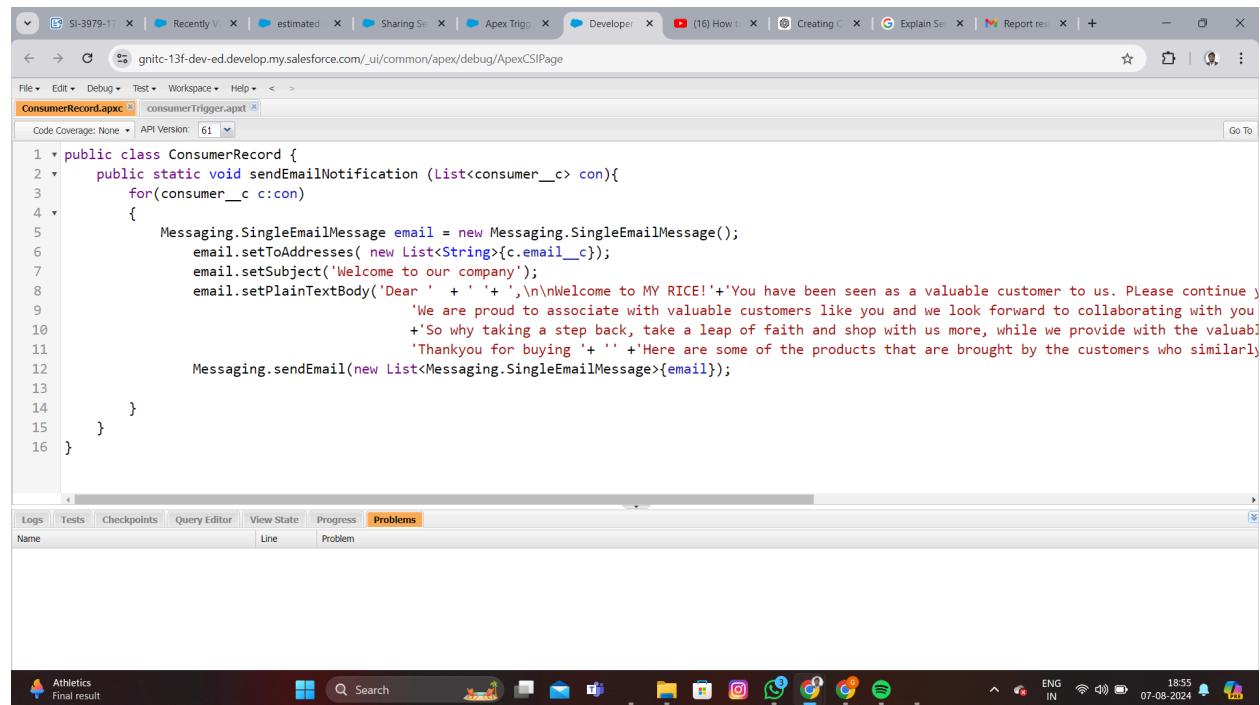
```
'Thankyou for buying ' + '' + 'Here are some of the products that are  
brought by the customers who similarly bought products like this' + '\n\n' +
```

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

```
}
```

```
}
```

```
}
```



```
1 public 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 )  
+ 'We are proud to associate with valuable customers like you and we look forward to collaborating with you  
+ 'So why taking a step back, take a leap of faith and shop with us more, while we provide with the valuable  
+ 'Thankyou for buying ' + '' + 'Here are some of the products that are brought by the customers who similarly  
Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
```

```
Logs Tests Checkpoints Query Editor View State Progress Problems
```

```
Name Line Problem
```

```
ENG IN 18:55 07-08-2024
```

Task 35:

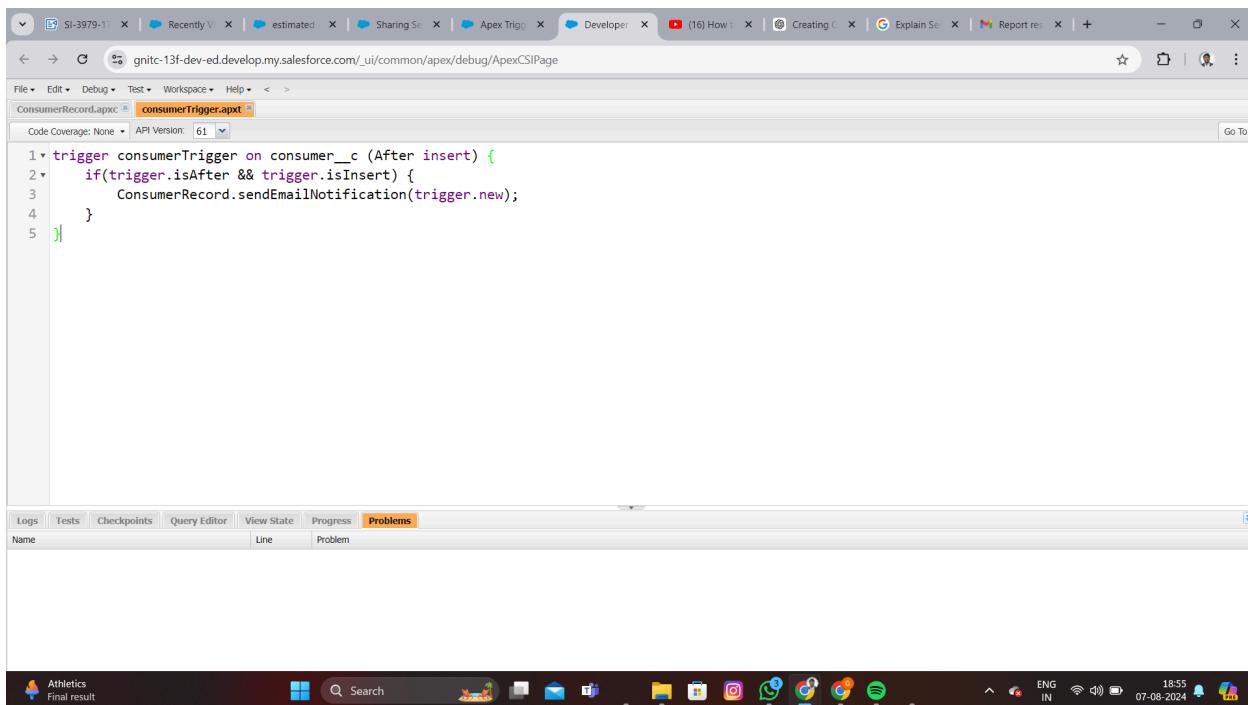
Creating an Apex Trigger

create a new trigger :

1. While still in the trailhead account, navigate to the gear icon in the top right corner.
2. Click on developer console and you will be navigated to a new console window.
3. Click on the File menu in the toolbar, and click on new >> Trigger.
4. Enter the trigger name as "consumerTrigger" and the object as "consumer__c" to be triggered.

Trigger code:

```
trigger consumerTrigger on consumer__c (After insert) {  
    if(trigger.isAfter && trigger.isInsert) {  
        ConsumerRecord.sendEmailNotification(trigger.new);  
    }  
}
```



The screenshot shows the Salesforce Developer Console interface. The title bar indicates the URL is gnite-13f-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The main area displays the Apex trigger code for 'consumerTrigger.apxt'. The code is as follows:

```
trigger consumerTrigger on consumer__c (After insert) {  
    if(trigger.isAfter && trigger.isInsert) {  
        ConsumerRecord.sendEmailNotification(trigger.new);  
    }  
}
```

The code editor has syntax highlighting for Apex. Below the code editor, there is a navigation bar with tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The Problems tab is currently selected. At the bottom of the screen, there is a taskbar with various icons and system status indicators.

Thank You