

CRM APPLICATION FOR WHOLESALE RICEMILL

BY

P.VISHWAPRIYA

vishwapriyapothulapally@gmail.com

INTRODUCTION

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

Features and Functionality:

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

A rollup summary field: This is a field that summarizes data from a child object to a parent object that shares a master-detail relationship. Rollup summary fields can use the COUNT, SUM, MIN, and MAX functions. For example, you could use a rollup summary field to display the total value (amount of rice supplied) from rice details on a related supplier.

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

Validation rules: validation rules also include an error message to display to the user when the rule returns a value of “True” due to an invalid value.so , In this project i gave Isblank formula.lsblank formula is used to verify whether it is blank it shows error.

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

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

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

Object

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

Salesforce objects are of two types:

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

To Navigate to Setup page:

Click on gear icon -click setup.

To create an object:

1. From the setup page - Click on Object Manager -Click on Create - Click on Custom Object.
2. On Custom object defining page:

3. Enter the label name, plural label name, click on Allow reports, Allow search.
4. Click on Save.

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.

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.

Create consumer Objects

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

1. Use these display format for the consumer
 - label name >> consumer
 - Plural label name >> consumers
 - Display Format >> consumers-{000}
 - Starting number >>1

Create rice details Objects

1. Use these display format for the rice details

- label name >> rice details
- Plural label name >> rice details
- Display Format >> rice-{000}
- Starting Number >>1

Tabs

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

Types of Tabs:

Custom Tabs

Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

Web Tabs

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

Visualforce Tabs

Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

Lightning Component Tabs

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

Lightning Page Tabs

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

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

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.

Creating Remaining Tabs

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

The Lightning App

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

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

Create a Lightning App

To create a lightning app page:

1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.
2. Fill the app name in app details as MY RICE >> Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.
- 3.

New Lightning App

App Details & Branding

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

App Details

App Name (Required)

Developer Name

Description

App Branding

Image Primary Color Hex Value

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

App Launcher Preview

Next

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

New Lightning App

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

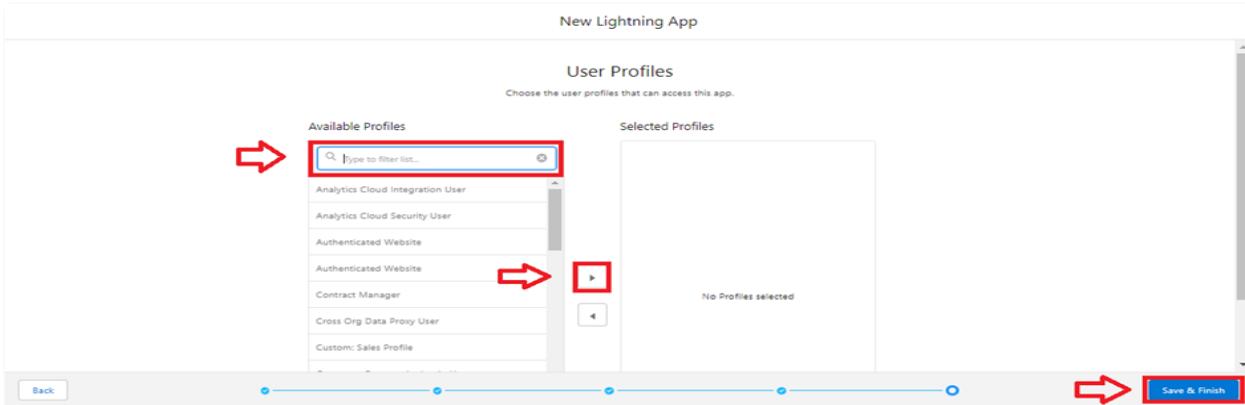
Type to filter list...

Selected Items

No items selected

Back Next

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



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

Fields

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

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

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

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

Custom Fields:

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

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. At the top, there's a search bar and a navigation bar with 'Setup' and 'Object Manager'. A red arrow points to the 'Object Manager' button. Below it, a list of objects is shown with two rows. The first row has 'Label' 'Student' and 'API Name' 'Student'. The second row has 'Label' 'Student Activity' and 'API Name' 'Student_Activity__c'. A red box highlights the 'Student' label, and a red arrow points to it. Another red box highlights the 'student' API name, and a red arrow points to it.

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

The screenshot shows the 'Fields & Relationships' section for the 'Supplier' object. On the left, there's a sidebar with various setup options like Details, Fields & Relationships (which is selected and highlighted with a red box), Page Layouts, Lightning Record Pages, etc. A red arrow points to the 'Fields & Relationships' link. On the right, there's a table titled 'Fields & Relationships' with several rows. A red arrow points to the 'New' button at the top right of the table. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
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 i

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 i Number of digits to the left of the decimal point

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

Field Name i

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 i

↑

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

Creating Junction Object

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

Creating junction object as rice details with supplier & rice mill

To create junction object

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

Object Manager						
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED	
Student	Student	Custom Object	College Management System	15/12/2022	<input checked="" type="checkbox"/>	i
Student Activity	Student_Activity__c	Custom Object	created for the purpose of junction object	06/01/2023	<input checked="" type="checkbox"/>	i

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

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

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

5. Give Field Label as “supplier Name” and click Next.

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

Creating a Master-Detail Relationship

master-detail relationship is a type of relationship between two objects where the master object controls certain behaviors and settings of the detail object. Here are a few use cases that demonstrate the use of master-detail relationships

Creating Master-Detail Relationship between consumer & rice mill Object

To Create a Master-Detail relationship

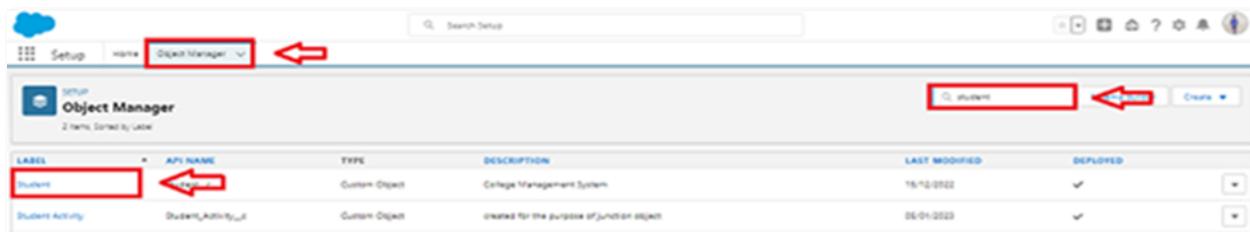
1. Go to the setup page >> click on object manager >> From drop down click edit for consumer object.
2. Click on fields & relationship >> click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. Select the related object “ rice mill ”.
5. Give Field Label as “rice mill name”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

Creating the Roll-up Summary

A rollup summary field is a field that summarizes data from a child object to a parent object that shares a master-detail relationship. Rollup summary fields can use the COUNT, SUM, MIN, and MAX functions. For example, you could use a rollup summary field to display the total value (amount of rice supplied) from rice details on a related supplier.

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

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



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

FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Name	Auto Number		
Age	Number(2, 0)		
Created By	Lookup(User)		
Date of Birth	Date		
Date of Joining	DateTime		
Gender	Picklist		
Last Modified By	LookupFieldBy	LookedUpUser	
Name	Name	Text(20)	
Owner	Owner	Lookup(User Group)	
phone no	Phone		
Record Type	Record Type		
Teacher	Teacher	LookupFieldBy	

3. Select the data type as "Rollup summary ",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 pop-up 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.

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

Step 2. Enter the details

Step 2 of 5

Field Label

Field Name

Description

Help Text

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

Step 2 of 5

Previous Next Cancel

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.

Step 3. Define the summary calculation

Select Object to Summarize

Master Object: seller
Summarized Object: **rice details**

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX
Field to Aggregate: rice distributed

Filter Criteria

All records should be included in the calculation
 Only records meeting certain criteria should be included in the calculation

Step 3 of 5

Previous Next Cancel

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.

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.

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

The screenshot shows the 'Fields & Relationships' section for the 'Supplier' object. The sidebar on the left lists various setup options like Details, Page Layouts, and Record Types. The main area displays a table of existing fields with columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. A red box highlights the 'Fields & Relationships' tab in the sidebar, and another red box highlights the 'New' button at the top right of the table header.

- Select Data type as "master detail" and click Next.
- Given the Field Label as " supplier name " and length as " 5 "

This screenshot shows the 'Step 2. Enter the details' configuration screen. It includes fields for Field Label (supplier Name), Length (18), Decimal Places (0), Field Name, Description, and Help Text. Below these are checkboxes for Required, Unique, External ID, AI Prediction, and a checkbox for 'Auto add to custom report type' which is checked. At the bottom right, there are 'Previous', 'Next', and 'Cancel' buttons, with a red arrow pointing towards the 'Next' button.

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

Creating Fields in rice mill Objects

- Select Data type as "Number" and click Next.
- Given the Field Label as " rice price/kg " and length as " 5 "

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> </td><td> </td></tr> <tr> <td> </td><td> </td></tr> </table>							
		<table border="1"> <tr> <td> </td><td> </td></tr> <tr> <td> </td><td> </td></tr> </table>							

Creating Cross Object Formula Field in consumer Object

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

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

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

Step 2. Choose output type

Step 2 of 5

Field Label	Field Name	Previous	Next	Cancel
Auto add to custom report type <input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity				
Formula Return Type				
<input checked="" type="radio"/> None Selected Select one of the data types below.				
<input type="radio"/> Checkbox	Calculate a boolean value. Example: <code>TODAY() > CloseDate</code>			
<input type="radio"/> Currency	Calculate a dollar or other currency amount and automatically format the field as a currency amount. Example: <code>Gross Margin = Amount - Cost_c</code>			
<input type="radio"/> Date	Calculate a date, for example, by adding or subtracting days to other dates. Example: <code>Reminder Date = CloseDate + 7</code>			
<input type="radio"/> Date/Time	Calculate a date/time, for example, by adding a number of hours or days to another date/time. Example: <code>NewDate = NOW() + 1</code>			
<input checked="" type="radio"/> Number	Calculate a numeric value. Example: <code>Fahrenheit = 1.8 * Celsius_c + 32</code>			
<input type="radio"/> Percent	Calculate a percent and automatically add the percent sign to the number. Example: <code>Discount = (Amount - Discounted_Amount_c) / Amount</code>			

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

```
amount paid (Number) =
rice_taken_by_shops_c * rice_mill_name_r.rice_price_kg_c
```

Functions

- All Function Categories -- ▾

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

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

1. Creating the Formula field in consumer Object

Note : check whether that the fields that mentioned in the formula field are created are

not , if not go to activity 9 and create that fields mentioned in consumer object

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

The screenshot shows the Salesforce Formula Editor. At the top, there are tabs for "Simple Formula" and "Advanced Formula", with "Simple Formula" selected. Below the tabs are buttons for "Insert Field" and "Insert Operator". To the right of the formula input area is a sidebar titled "Functions" with a dropdown menu set to "All Function Categories". The sidebar lists several functions: ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. At the bottom of the sidebar is a button labeled "Insert Selected Function". The main input area contains the formula: "amount paid (Number) = rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c". Below the input area, a status bar displays "Check Syntax" and "No syntax errors in merge fields or functions. (Compiled size: 67 characters)".

8.

Creating the validation rule

Improve the quality of your data using validation rules. Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of “True” or “False”. Validation rules also include an error message to display to the user when the rule returns a value of “True” due to an invalid value.

Creating the validation rule for phone number field in consumer object

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

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

2. Click on the validation rule >> click New.

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

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' interface. The formula field contains the expression `OR(ISBLANK(phone_number_c) , ISBLANK(email_c))`. A tooltip for the `ABS` function is displayed, explaining it returns the absolute value of a number. The 'Check Syntax' button at the bottom left indicates 'No errors found'.

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

The screenshot shows the Validation Rule Editor in Salesforce. The formula field contains the expression: OR(ISBLANK(phone_number__c), ISBLANK(email__c)). A context menu is open on the right side, listing functions: ACOS, ADDMONTHS, AND, ASCII, ASIN, ABS(number), and Help on this function.

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message: please fill phone number

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

Error Location: Top of Page Field

Buttons: Save, Save & New, Cancel

9.

10. Save the validation rule.

Page layouts

Page Layout in Salesforce allows us to customize the design and organize detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

creating the page layout

To Create a Page layout:

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

Page Layouts		
2 Items, Sorted by Page Layout Name		
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

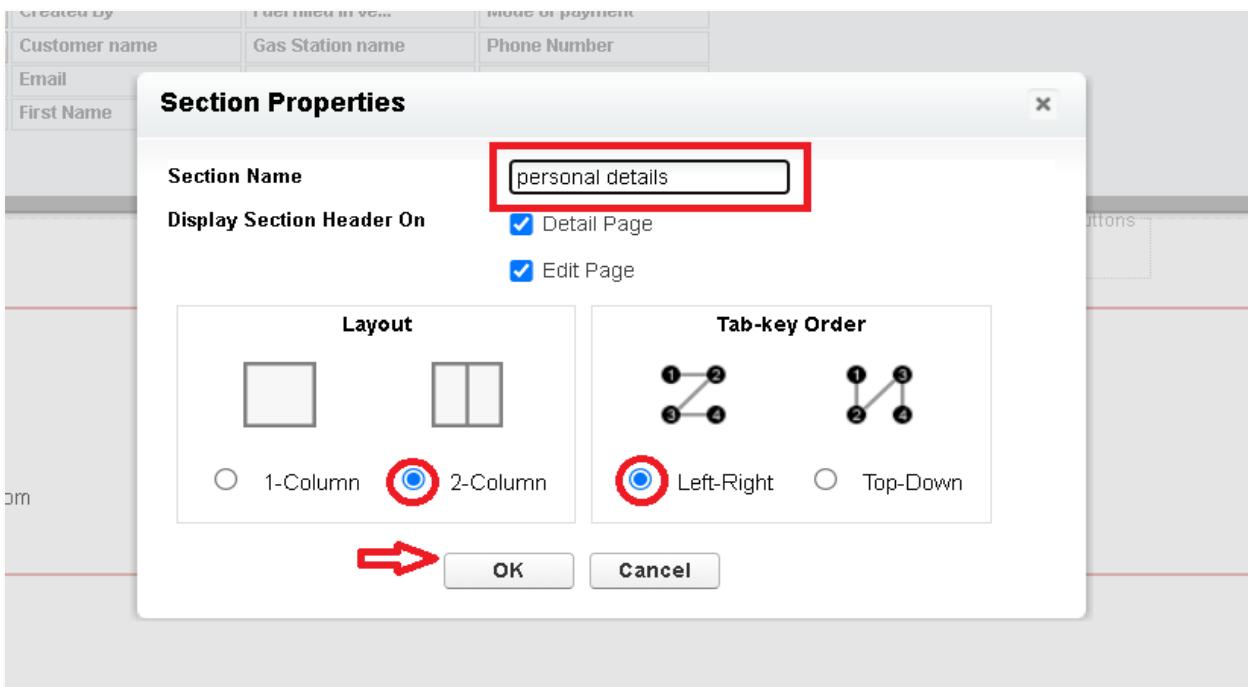
3. Select the existing page layout, and give the page layout name as "consumer layout", and click save.

Create New Page Layout

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
<input type="button" value="Save"/> <input type="button" value="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.

12.

Profiles

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

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

We cannot deleted standard ones

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

2. Custom Profiles:

Custom ones defined by us.

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

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.

Profile Detail

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

Page Layouts

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

2.

3. Scroll down to Custom Object Permissions and Give access permissions for consumers, rice details , rice mill and suppliers objects as mentioned in the below diagram.

Object	Basic Access						Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Assets	<input type="checkbox"/>											
Asset Services	<input type="checkbox"/>											
books	<input type="checkbox"/>											
books	<input type="checkbox"/>											
Brokers	<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"/>											
energy audits	<input type="checkbox"/>											
item details	<input type="checkbox"/>											
nick names	<input type="checkbox"/>											
positions	<input type="checkbox"/>											
Projects	<input type="checkbox"/>											
ProjectTasks	<input type="checkbox"/>											
Properties	<input type="checkbox"/>											
purchasers	<input type="checkbox"/>											
reviews	<input type="checkbox"/>											
rice details	<input checked="" type="checkbox"/>											
rice mills	<input checked="" type="checkbox"/>											
SolarBots	<input type="checkbox"/>											
SolarBot Status	<input type="checkbox"/>											
studs	<input type="checkbox"/>											
students	<input type="checkbox"/>											
super marts	<input type="checkbox"/>											
suppliers	<input checked="" type="checkbox"/>											
teachers	<input type="checkbox"/>											
tickets	<input type="checkbox"/>											
vendors	<input type="checkbox"/>											

4.

5. Give access and save it.

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 sets side-by-side:

	Basic Access						Data Administration	
	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"/>						
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"/>		

	Basic Access						Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		
purchasers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
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"/>		
students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
super marts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
suppliers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" 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"/>		
tickets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
vendors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

5. And click save.

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 two separate Role Assignment grids. The left grid lists profiles: Assets, Asset Services, books, Brokers, consumers, Employees, energy audits, item details, nick names, positions, and Projects. The right grid lists profiles: purchasers, reviews, rice details, rice mills, SolarBots, SolarBot Status, studs, students, super marts, suppliers, teachers, and tickets. Both grids have columns for Basic Access (Read, Create, Edit, Delete) and Data Administration (View All, Modify All). Checkmarks indicate which access levels are assigned to each profile.

Profile	Basic Access				Data Administration	
	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 checked="" 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"/>
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 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"/>
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"/>
studs	<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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
suppliers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
teachers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
tickets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- And click save.

Role & Role Hierarchy

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

Creating owner Role

Creating owner Role:

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

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

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

- Click and save it.

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 'Roles' page in the Salesforce Setup. The title is 'Creating the Role Hierarchy'. It displays a tree view of roles under 'Your Organization's Role Hierarchy'. The hierarchy starts with 'smartbridge' at the top level, which contains 'CEO', 'CFO', 'COO', 'HR', and 'owner'. 'CEO' has children 'CFO', 'COO', and 'HR'. 'owner' has children 'SVP.Customer Service & Support', 'SVP.Human Resources', and 'SVP.Sales & Marketing'. Each role node has 'Edit | Del | Assign' options. There is a 'Show in tree view' dropdown in the top right corner.

```
graph TD; smartbridge[smartbridge] --> CEO[CEO]; smartbridge --> CFO[CFO]; smartbridge --> COO[COO]; smartbridge --> HR[HR]; smartbridge --> owner[owner]; CEO --> CFO; CEO --> COO; CEO --> HR; owner --> SVP_Customer_Service_Support[SVP.Customer Service & Support]; owner --> SVP_Human_Resources[SVP.Human Resources]; owner --> SVP_Sales_Marketing[SVP.Sales & Marketing]
```

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

The screenshot shows the 'Roles' section under 'SETUP'. The tree view lists various roles:

- Manager**: Edit | Del | Assign
 - Add Role**
- On Site Employee**: Edit | Del | Assign
 - Add Role**
- Remote Employee**: Edit | Del | Assign
 - Add Role**
- owner**: Edit | Del | Assign
 - Add Role**
- employer**: Edit | Del | Assign
 - Add Role**
- SVP_Customer Service & Support**: Edit | Del | Assign
 - Add Role**
- 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
 - Add Role**
- VP_International Sales**: Edit | Del | Assign
 - Add Role**
- VP_Marketing**: Edit | Del | Assign

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

Users

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

Create User

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

11. Profiles : owner.

User Edit
vicky y

User Edit

General Information

First Name: vicky

Last Name: y

Alias: vy

Email: ramesh0820@gmail.com

Username: ramesh0820@754123gmail

Nickname: vicky

Title:

Company:

Department:

Division:

Role: owner

User License: Salesforce

Profile: owner

Active:

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: --None--

Data.com Monthly Addition Limit: 300

12. Save it.

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.

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

Permission sets

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

Creating OWD setting.

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

Organization-Wide Defaults			
Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public ReadWriteTransfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public ReadWrite	Private	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>

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.

Report

Create Report

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

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

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

2. Click

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	range of amount per day	estimated rice per day	udayrushi yelagandula	10/7/2023, 2:41 pm		
Created by Me	range of amount per day	estimated rice per day	udayrushi yelagandula	13/7/2023, 12:56 pm		
Private Reports	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	
Public Reports						
All Reports						
FOLDERS						

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

The screenshot shows a report configuration interface for a system named 'My Rice'. The top navigation bar includes links for 'suppliers', 'rice mills', 'rice details', 'consumers', and 'Reports'. The current report is titled 'rice mills with consumers'. The left sidebar contains sections for 'Outline', 'Filters' (with a count of 1), 'Groups', 'Columns', and 'Rows'. The main area displays a table with the following data:

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

At the bottom of the table, there are checkboxes for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total'.

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

The screenshot shows a report preview for 'range of amount per day'. The top header includes the report title and a 'Save & Run' button. Below the header, summary statistics are displayed: 'Total Records: 11', 'Total rice price/kg: 50', and 'Total amount paid: 9,050.00'. The main data table is identical to the one in the configuration screen, showing the same 11 rows of data with columns for 'rice taken by shops', 'consumer: consumer name', 'rice type', 'rice price/kg', 'mode of payments', and 'amount paid'.

Sharing report to owner

1. Click edit drop down and select subscribe option

My Rice suppliers rice mills rice details consumers * range of amount per day

Report: rice mills with consumers
range of amount per day

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

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

Save As
Save
Subscribe
Export
Delete
Add to Dashboard

2. Follow as per below image.

Edit Subscription

Settings

Frequency

- Daily**
- Weekly
- Monthly

Time

8:00 am

Attachment

[Attach File](#)

Recipients

Send email to

Me

[Edit Recipients](#)

Run Report As

Me

Another Person

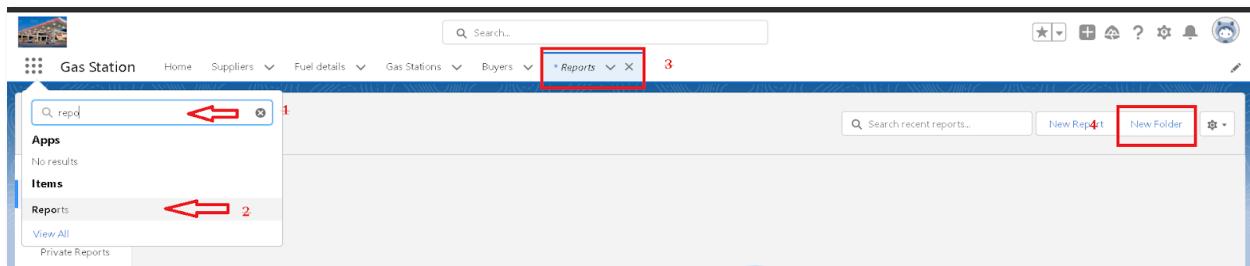
[Cancel](#) [Save](#)

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

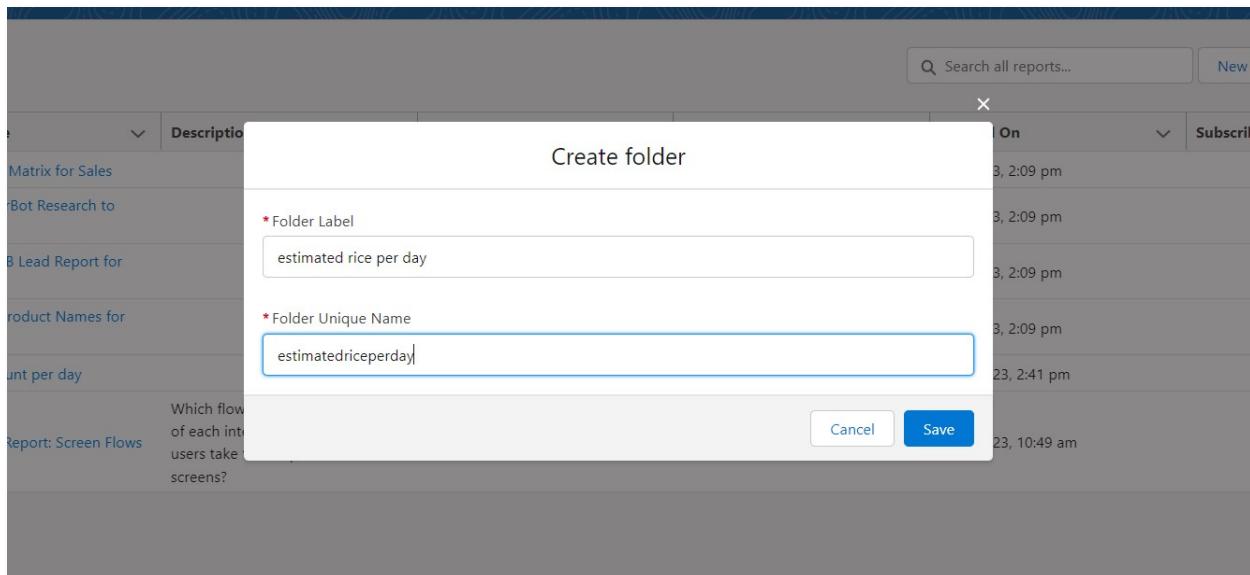
NOTE: The owner gets daily email notification of that rice mill report so that he can see all data remotely.

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.

REPORTS

	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"/>

FOLDERS

	Report Name	Description	Folder	Created By	Created On	Subscribed
All Folders	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	<input type="checkbox"/>

FAVORITES

	Report Name	Description	Folder	Created By	Created On	Subscribed
All Favorites						<input type="checkbox"/>

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

Move range of amount per day

All Folders

- All Folders
- Created by Me
- Shared with Me
- Private Reports
- Public Reports
- estimated rice per day
- Report Recycle Bin

New Folder Cancel Select

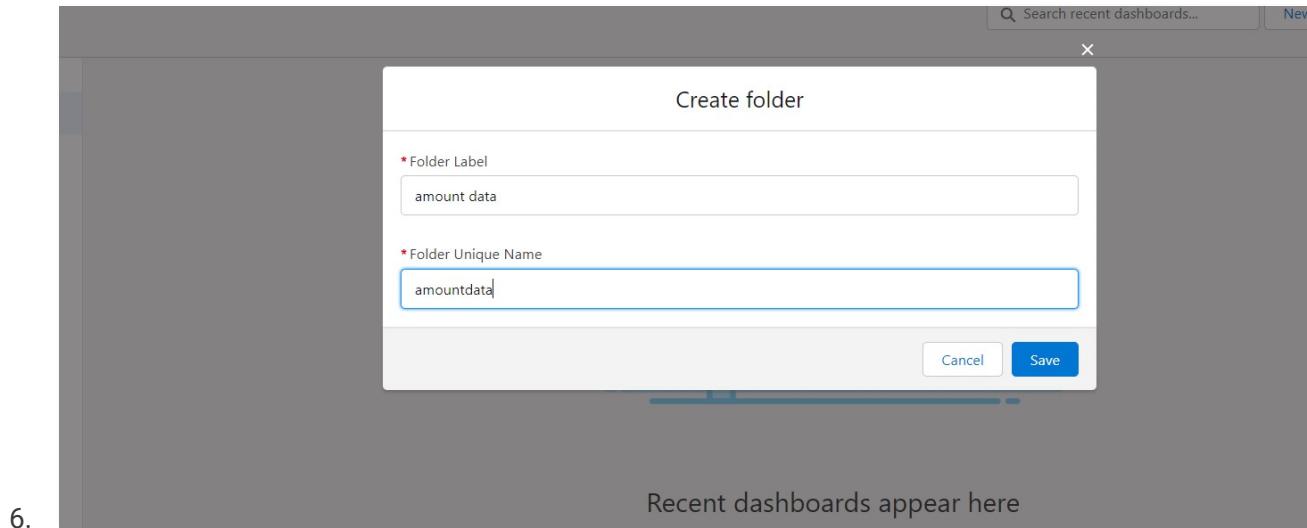
Note: if you want to see the report which you have created then go to reports - all folders - estimated rice per day - your report will appear in this way.

Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

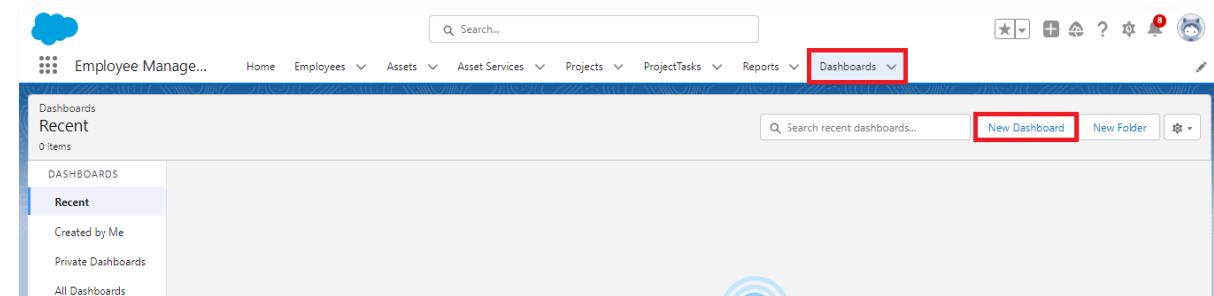
Create Dashboard Folder

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

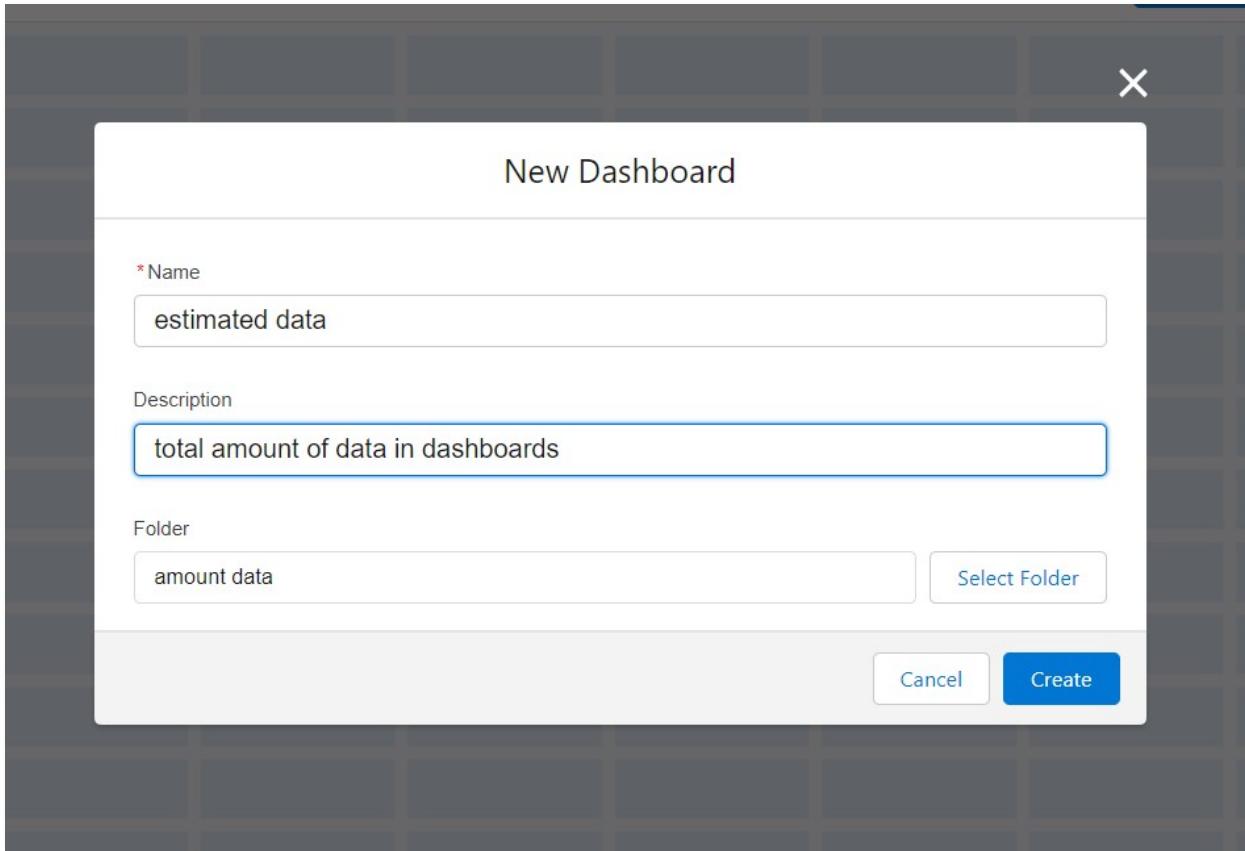


Create Dashboard

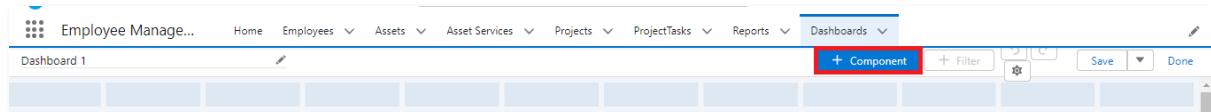
1. Go to the app >> click on the Dashboards tabs.



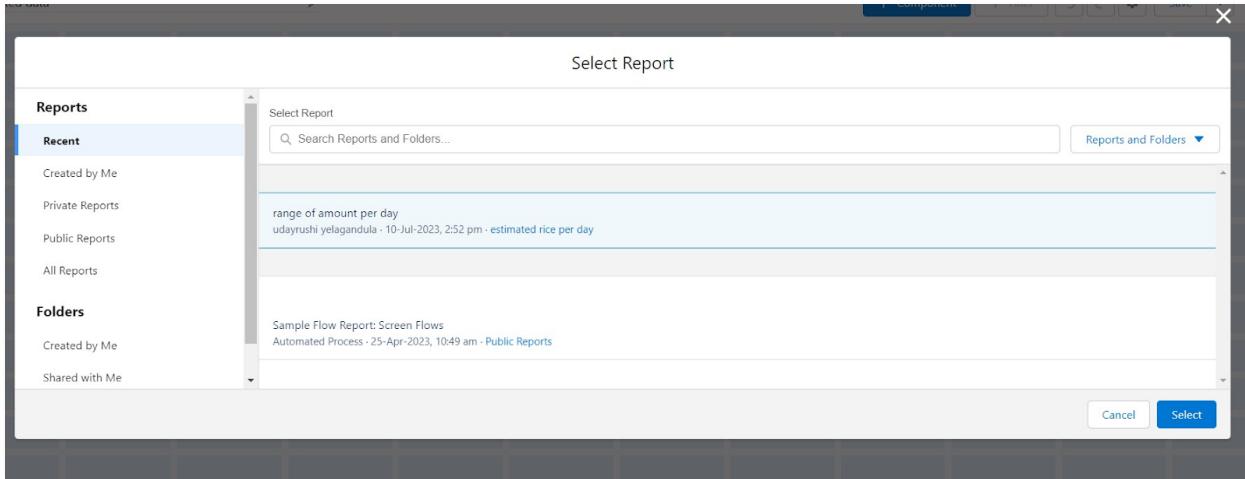
2. Give a Name and select the folder that was created, and click on create.



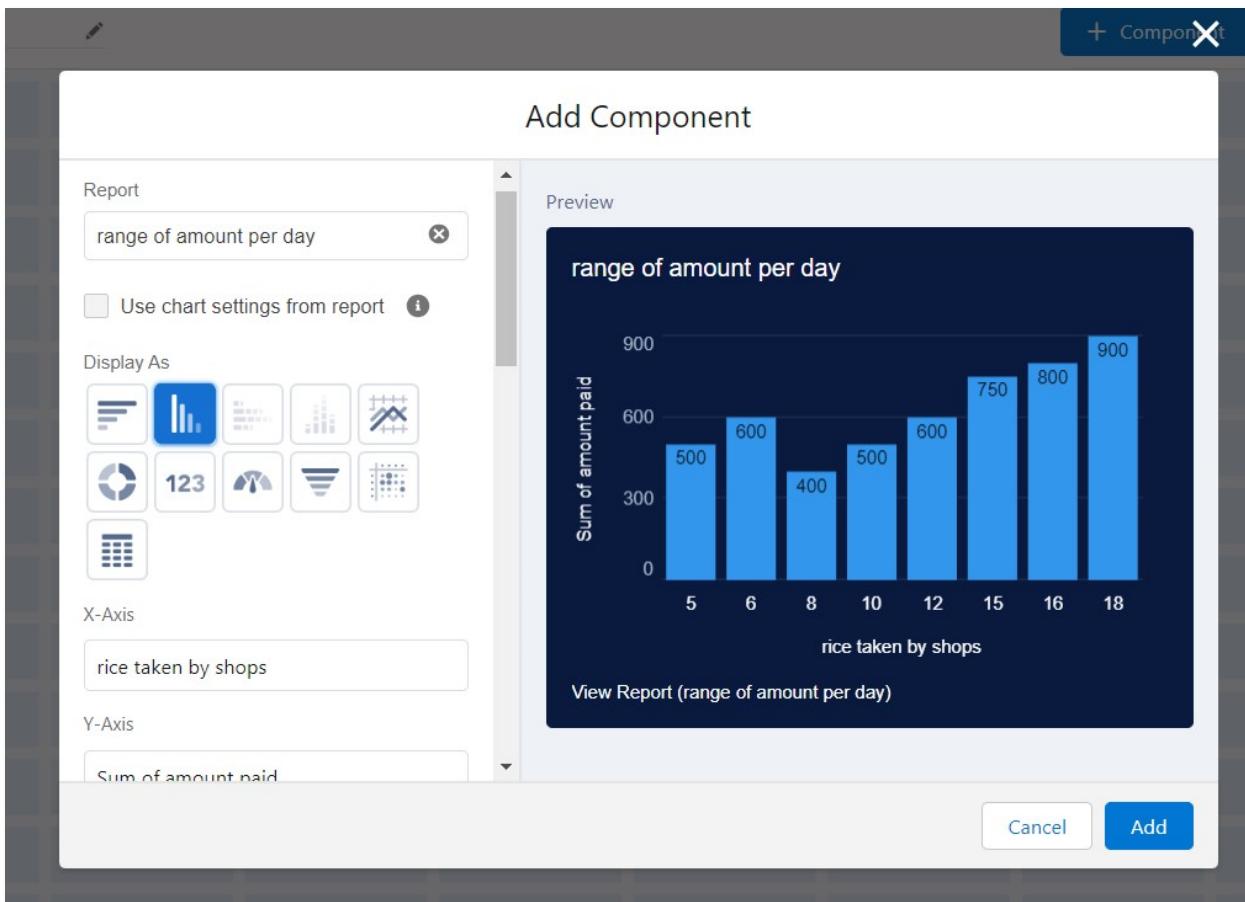
1. Select add component.



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"

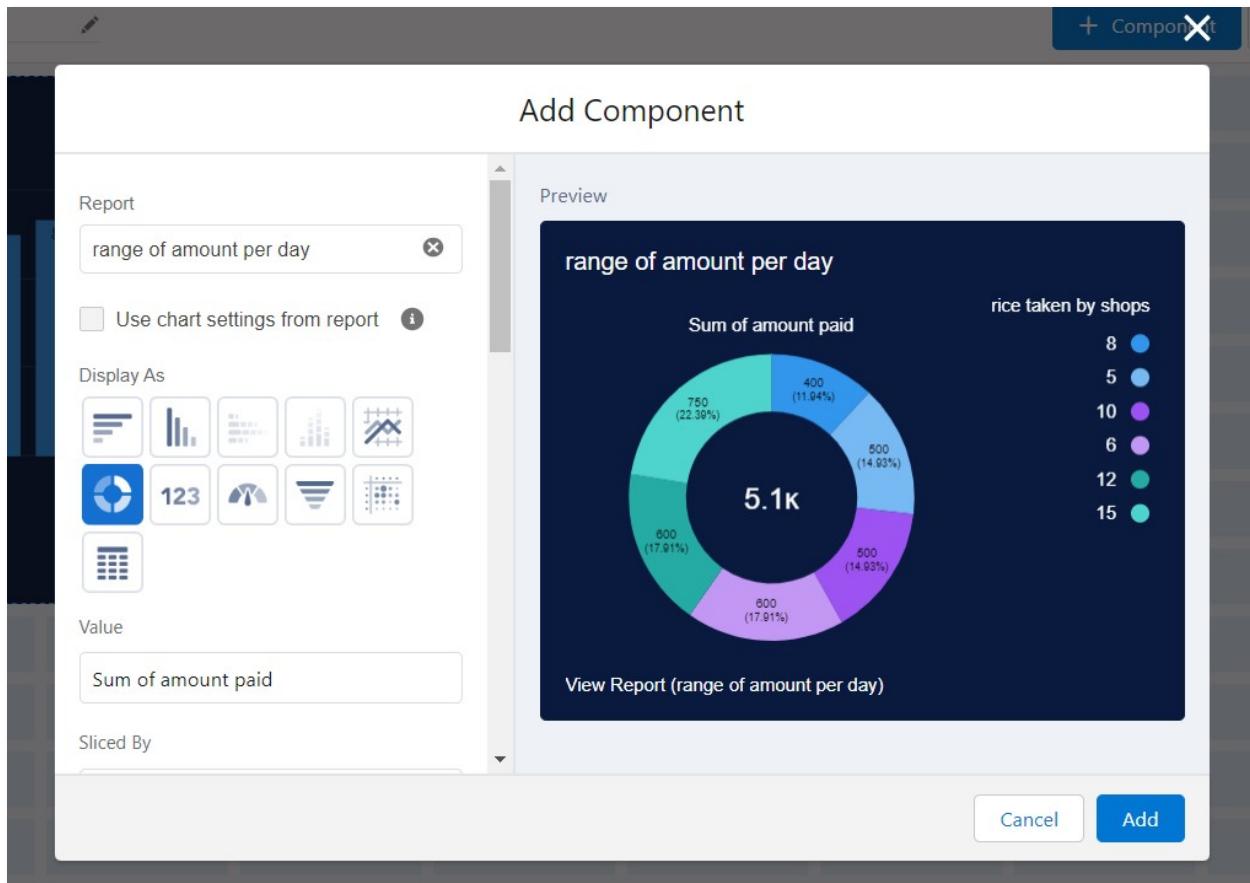
Show Total

Decimal Places

Automatic

Click add.

Click save and done.



APEX

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

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

Creating Classes :

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

related class concepts.

- **Class:**

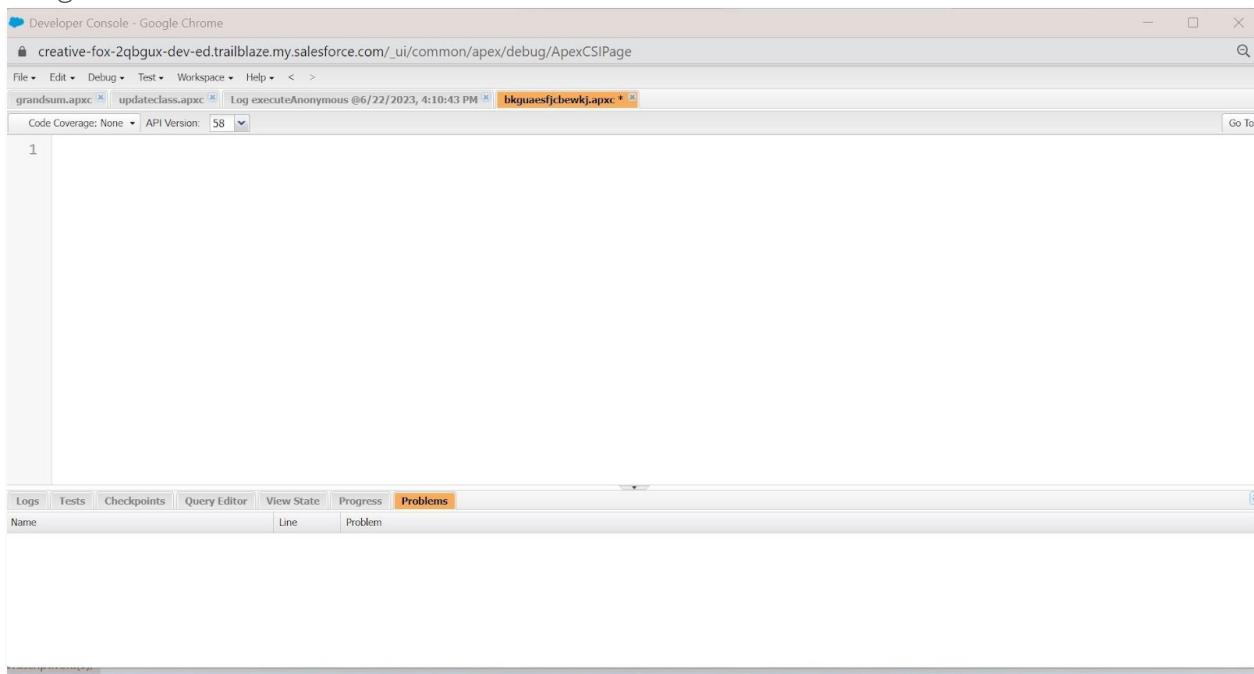
As in Java, you can create classes in Apex. A class is a template or blueprint from which objects are created. An object is an instance of a class.

- **Object**

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

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});

}
}
}

```

```

Developer Console - Google Chrome
smartbridge26-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < ▾
ConsumerRecord.apxc * consumerTrigger.apxc * RiceDetails.apxc * RiceDetail.apxc *
Code Coverage: None API Version: 58 Go To
1 * class ConsumerRecord {
2 *     public static void sendEmailNotification (List<consumer__c> con){
3 *         for(consumer__c c:con)
4 *         {
5 *             Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
6 *             email.setToAddresses( new List<String>{c.email__c});
7 *             email.setSubject('Welcome to our company');
8 *             email.setPlainTextBody('Dear ' + ' '+ ',\n\nWelcome to MY RICE!'+'You have been seen as a valuable customer to us. Please continue your
9 *                 'We are proud to associate with valuable customers like you and we look forward to collaborate with you by pr
10 *                     +'So why taking a step back, take a leap of faith and shop with us more, while we provide with the valuable p
11 *                         'Thankyou for buying '+' '+Here are some of the products that are brought by the customers who similarly bo
12 *             Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
13 *
14 *     }
15 *
16 *
17 *
18 *
19 *
Logs Tests Checkpoints Query Editor View State Progress Problems
Name Line Problem

```

Creating an Apex Trigger

How to create a new trigger :

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

Click on developer console and you will be navigated to a new console window.

Click on the File menu in the toolbar, and click on new? Trigger.

Enter the trigger name and the object to be triggered.

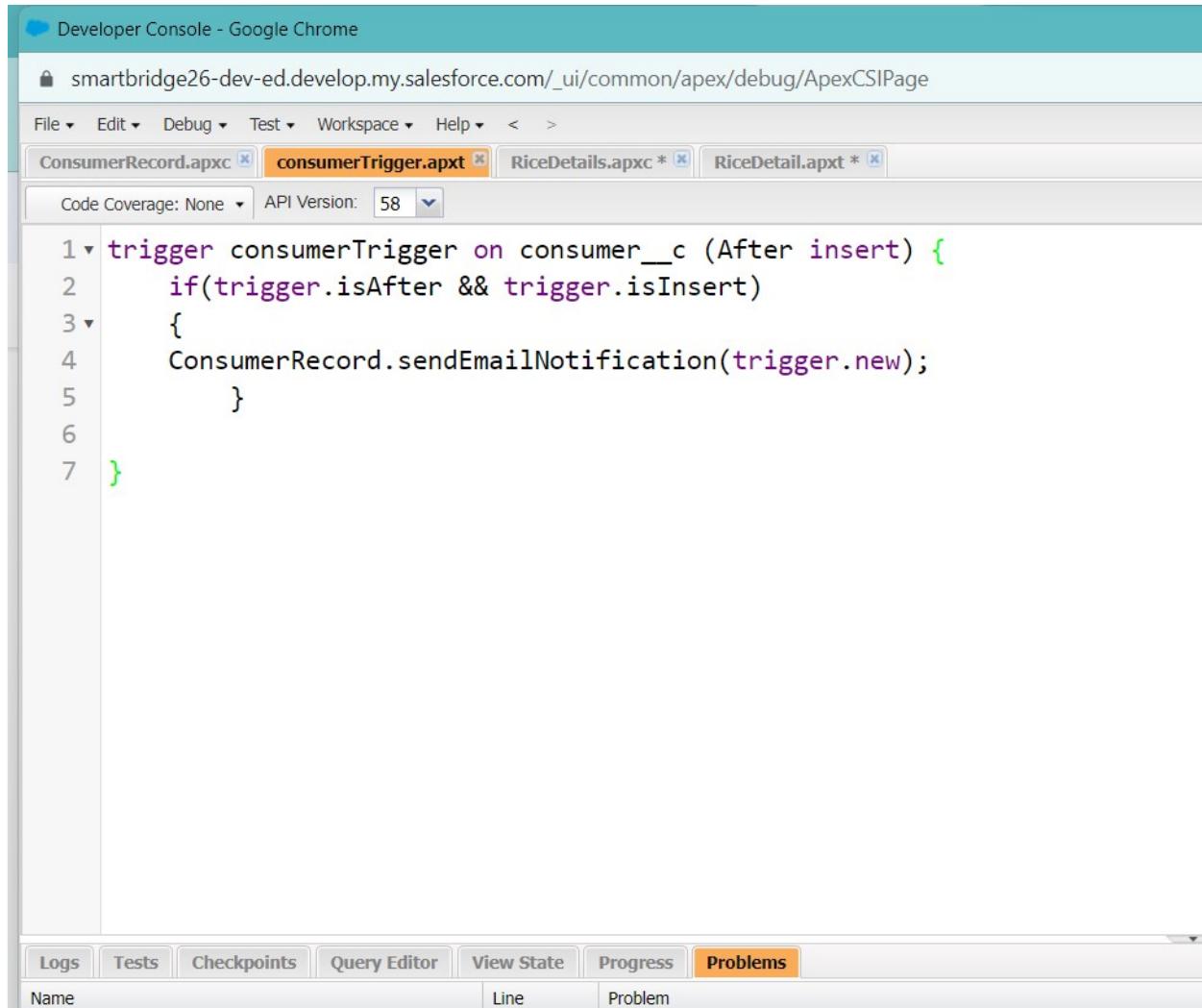
Syntax For creating trigger :

The syntax for creating trigger is :

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

Trigger code:

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



The screenshot shows the Salesforce Developer Console in Google Chrome. The URL is smartbridge26-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The tab bar shows ConsumerRecord.apxc, consumerTrigger.apxt (which is active), RiceDetails.apxc *, and RiceDetail.apxt *. The code editor displays the following Apex trigger code:

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

The code editor interface includes a toolbar with File, Edit, Debug, Test, Workspace, Help, and navigation buttons. Below the toolbar are dropdowns for Code Coverage (None) and API Version (58). The bottom navigation bar includes tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems, with the Problems tab currently selected.

