

**A Project Report**  
**on**  
**“A CRM APPLICATION FOR**  
**WHOLESALE RICE MILL”**

**by**  
**DIGESH SOSE**

**Project Description**

The Rice Mill CRM Application is a comprehensive solution meticulously designed to streamline and simplify the daily operations of a rice mill factory. This application focuses on critical aspects such as tracking rice production, monitoring sales, and categorizing various types of rice. By leveraging the power of customer relationship management (CRM), the application aims to enhance customer experiences, optimize store operations, and improve overall efficiency within the rice mill environment.

One of the core features of the application is its ability to provide detailed reports on the amount of rice produced each day. This functionality allows management to keep a close watch on production levels, ensuring that the factory operates smoothly and efficiently. By having access to real-time production data, managers can make informed decisions, identify potential bottlenecks, and adjust processes as needed to maintain optimal production rates.

In addition to production tracking, the Rice Mill CRM Application offers robust sales monitoring capabilities. It meticulously tracks the number of rice units sold on a daily basis, enabling the factory to understand sales trends and identify popular rice varieties. This information is crucial for effective inventory management, as it helps in maintaining a balanced stock of various rice types to meet customer demand. By understanding which types of rice are selling the most, the factory can adjust its production focus and marketing strategies accordingly.

The application also excels in categorizing different types of rice and providing daily reports on their production and sales. This feature is particularly beneficial for maintaining an organized and efficient inventory system. By categorizing rice types, the application ensures that each variety is adequately tracked and managed, preventing stockouts or overproduction of any particular type. This level of detail in inventory management helps the factory to operate more efficiently and meet customer needs more precisely.

## 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 bought customers. Easy to understand the data to the owner, improving resource allocation, and planning future development.

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

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

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

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

## Introduction to Salesforce

### Introduction:

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

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

### **What Is Salesforce?**

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

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

**So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:**

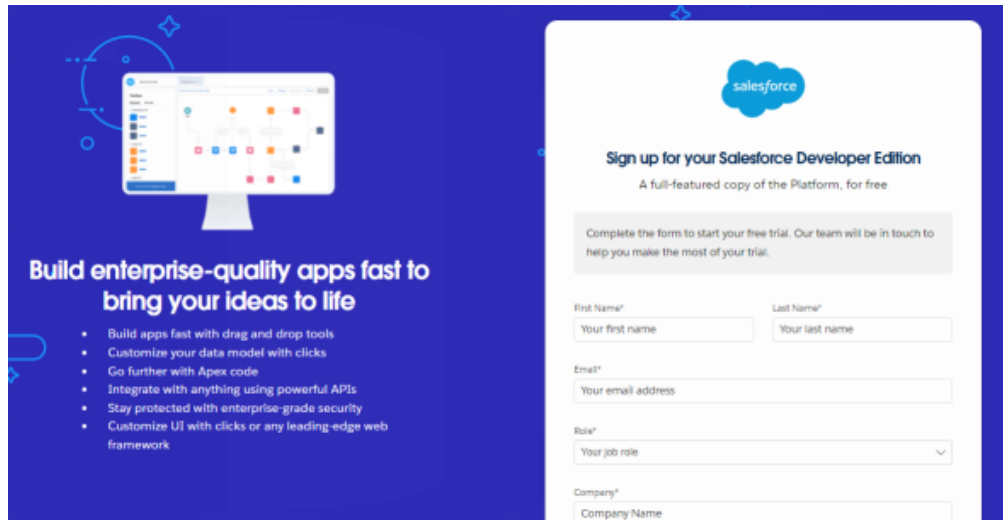
**<https://youtu.be/r9EX3lGde5k>**

## **Activity 1: Creating Developer Account**

**Creating a developer org in salesforce.**

- 1. Go to <https://developer.salesforce.com/signup>**

Smartinternz Salesforce Internship  
Digesh Sose



2. On the sign up form, enter the following details :

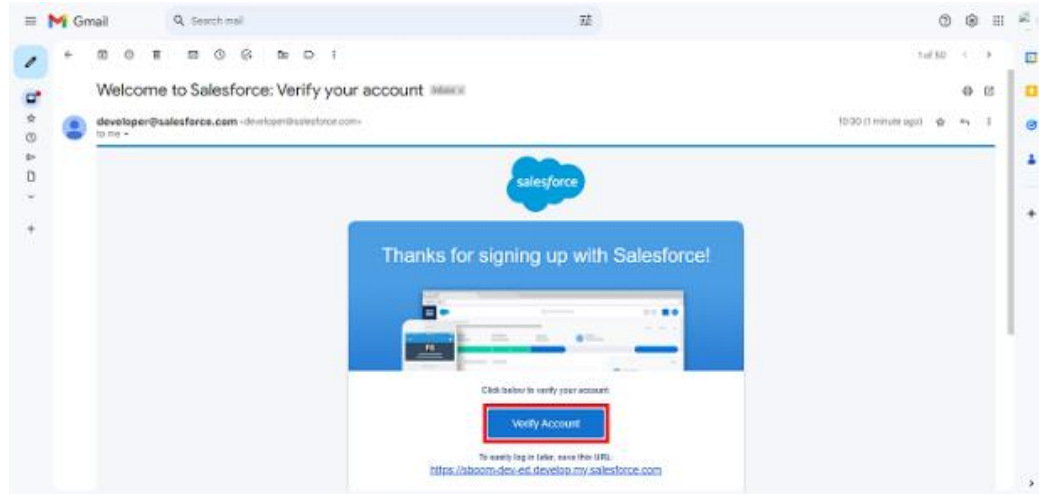
1. 1. First name & Last name
2. 2. Email
3. 3. Role : Developer
4. 4. Company : College Name
5. 5. Country : India
6. 6. Postal Code : pin code
7. Username : should be a combination of your name and company

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

## Activity 2: Account Activation

Activity 2::

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.

A screenshot of the 'Change Your Password' form. The form is titled 'Change Your Password' and asks to 'Enter a new password for lead@sb.com'. It includes a list of requirements: '8 characters', '1 letter', and '1 number', all marked with green checkmarks. There are two password input fields: 'New Password' and 'Confirm New Password'. Below these is a 'Security Question' dropdown menu with the option 'In what city were you born?'. An 'Answer' input field contains the text 'asdfghjkl'. At the bottom of the form, a blue 'Change Password' button is highlighted with a red rectangular box.

4. Then you will redirect to your salesforce setup page

## Object

### What Is an Object?

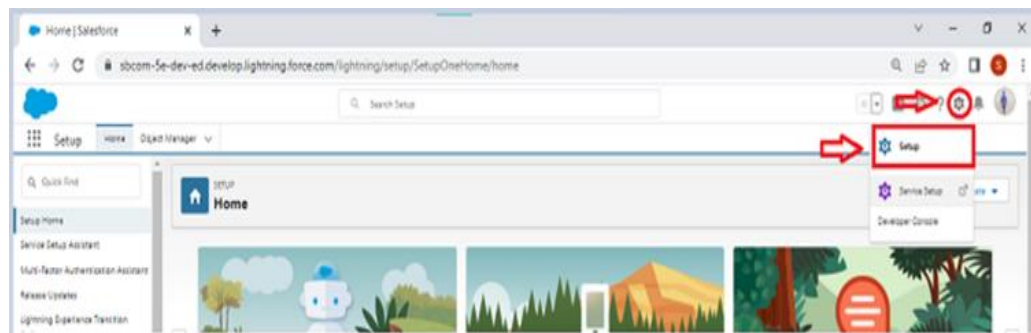
**Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects**

**Salesforce objects are of two types:**

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

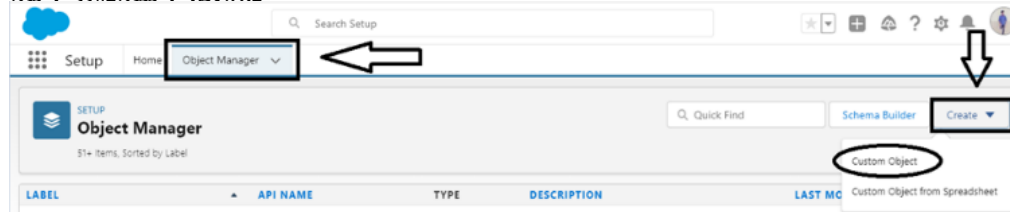
### To Navigate to Setup page:

Click on gear icon → click setup



### To create an object:

1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object



2. On Custom object defining page:

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

.



Smartinternz Salesforce Internship  
Digesh Sose

The screenshot shows the 'New Custom Object' page in Salesforce Setup. Red annotations highlight the following fields and sections:

- Custom Object Information:**
  - Label:** A text field with a red box and an arrow pointing to it.
  - Plural Label:** A text field with a red box and an arrow pointing to it.
  - Object Name:** A text field with a red box and an arrow pointing to it.
- Optional Features:**
  - Allow Reports:** A checkbox that is checked, with a red circle and an arrow pointing to it.
- Search Status:**
  - Allow Search:** A checkbox that is checked, with a red circle and an arrow pointing to it.
- Buttons:** At the bottom, the 'Save' button is highlighted with a red box and an arrow pointing to it.

4. Click on **Save**.

### Activity 1: 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

**2 . Enter Record Name Label and Format**

1. Record Name → **supplier Name**

2. Data Type → Text

2. **Click on Allow reports and Track Field History and allow search**

3. Allow search → **Save.**

**Activity 2: 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**

1. Record Name →

2. Data Type → Auto Number

3. Display Format → rice-{000}

4. Starting number → 1

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

3. Allow search → **Save.**

### **Activity 3: 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**

1. label name → **consumer**
2. Plural label name → **consumers**
3. Display Format → **consumers-{000}**
4. Starting number → 1

### **Activity 4: Create rice details Objects:**

**2. Use these display format for the rice details**

1. label name → rice details
2. Plural label name → rice details
3. Display Format → rice-{000}
4. Starting number → 1

## **Tab**

**1. 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.**

2. **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.

1. **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.

2. **Lightning Component Tabs**

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

3. **Lightning Page Tabs**

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

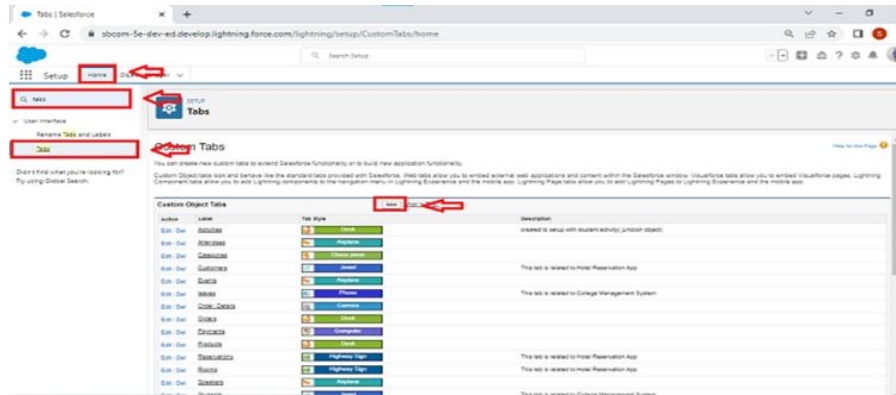
**Lightning Page tabs** don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

### **Activity 1: 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)

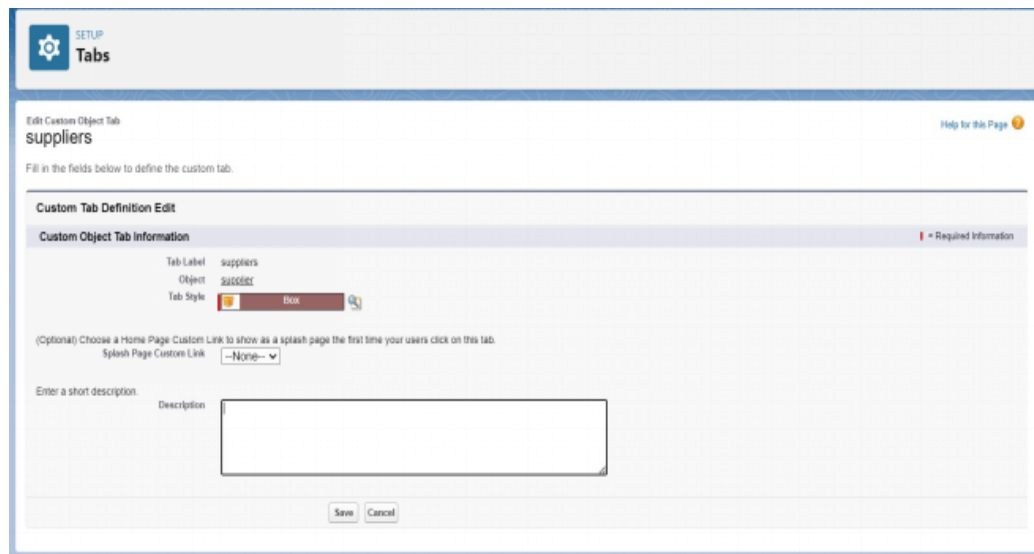
Smartinternz Salesforce Internship  
Digesh Sose



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.**



Smartinternz Salesforce Internship  
Digesh Sose

**Tab Style Selector** Create your own style

Hide styles which are used on other tabs

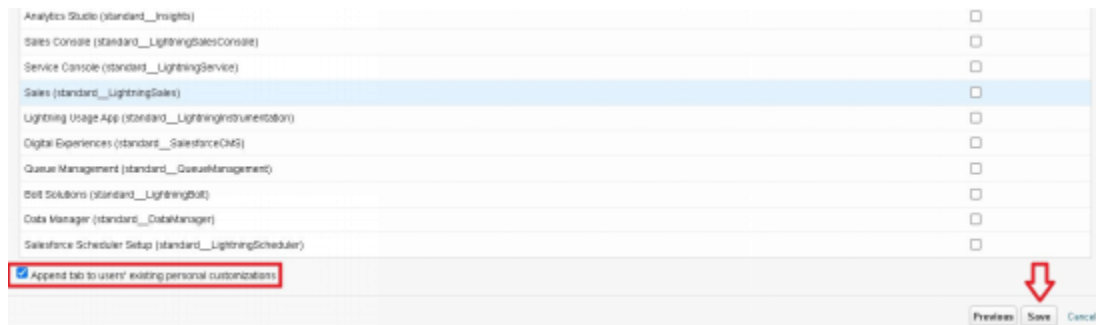
Airplane	Alarm clock	Apple	Balls
Bank(1)	Bell	Big top	Boat(1)
Books	Bottle	Box	Bridge
Building	Building Block	Caduceus	Camera
Can	Car	Castle	CD/DVD
Cell phone	Chalkboard	Chess piece	Chip
Circle	Compass	Computer	Credit card
CRT TV	Cup	Desk(1)	Diamond
Dice	Factory	Fan	Flag
Form	Gears	Globe	Guitar
Hammer	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	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"/>



## 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.**

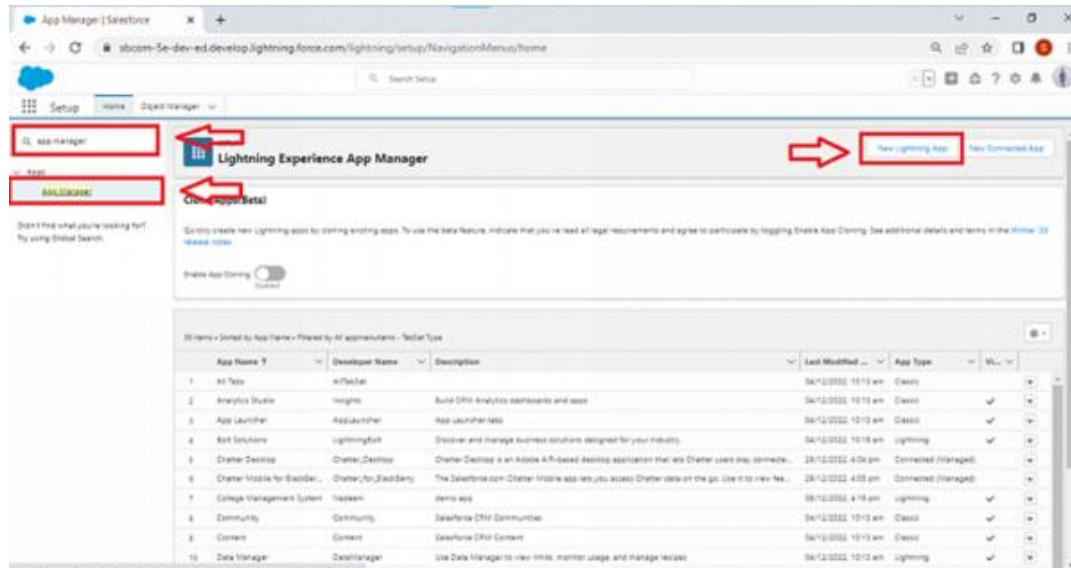
**Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.**

### Activity 1: Create a Lightning App

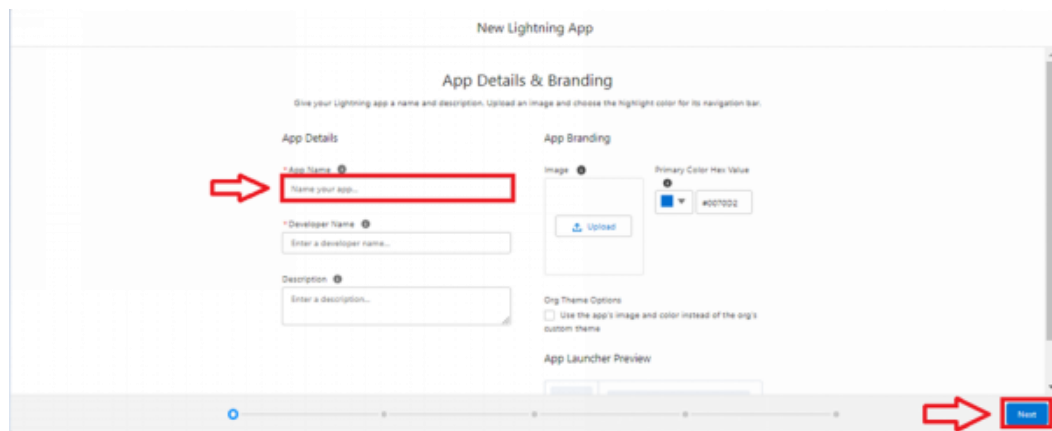
**To create a lightning app page:**

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

Smartinternz Salesforce Internship  
Digesh Sose



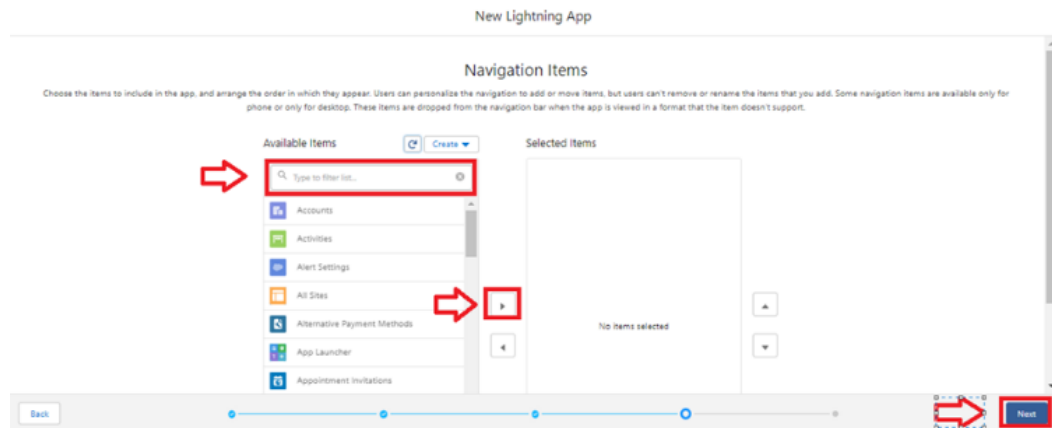
2. Fill the app name in app details as MY RICE → Next → (App option page) keep it as default → Next → (Utility Items) keep it as default → Next.



3. Upload a photo that is related to your app.

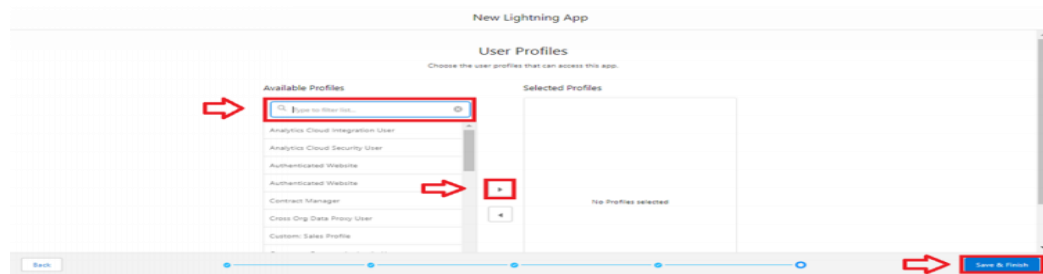


#### 4. To Add Navigation Items:



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

#### 5. 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,

- Created By
- Owner
- Last Modified
- Field Made During object Creation

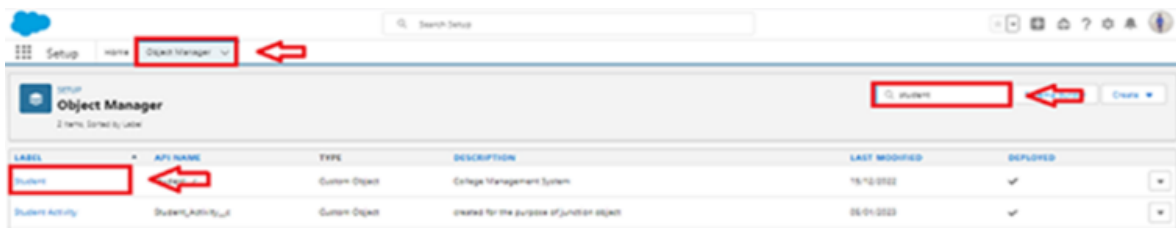
### Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to 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.

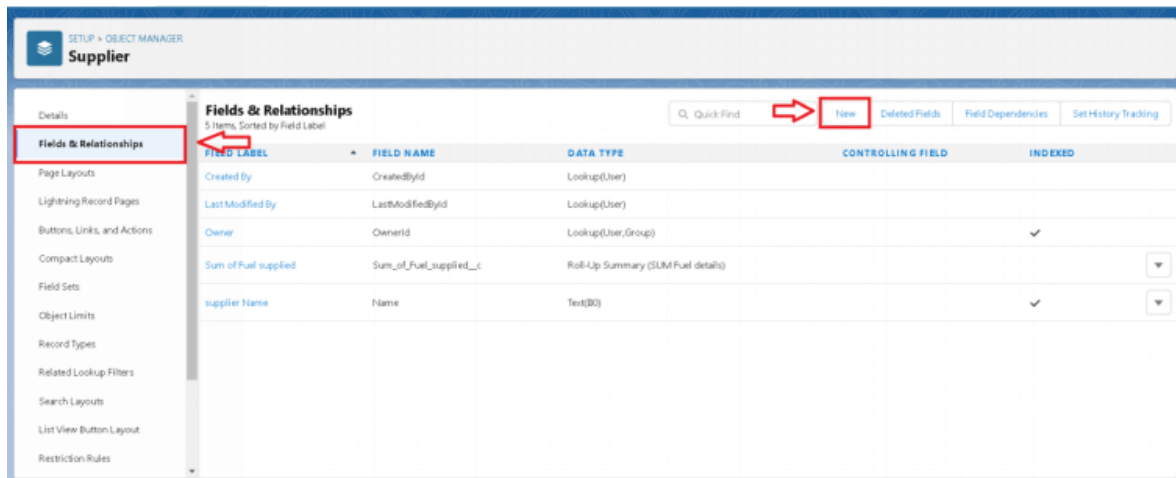
## Activity 1: Creating the number field in rice details object

### Creating the number field in rice details object

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



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



3. Select Data type as “Number” and click Next.

4. Given the Field Label as “ rice distributed ” and length as “ 5 ”.

The screenshot shows the 'Step 2: Enter the details' form for creating a new field. The 'Field Label' field is highlighted with a red box and contains the text 'rice distributed'. The 'Length' field is also highlighted with a red box and contains the value '5'. The 'Decimal Places' field contains the value '0'. The 'Field Name' field is auto-populated with 'rice\_distributed\_\_c'. The 'Description' and 'Help Text' fields are empty. The 'Required' checkbox is checked. The 'Unique' checkbox is unchecked. The 'External ID' checkbox is unchecked. The 'AI Prediction' checkbox is unchecked. The 'Add this field to existing custom report types that contain this entity' checkbox is checked.

Step 2: Enter the details

Field Label:

Length:

Decimal Places:

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

Add this field to existing custom report types that contain this entity: ☒

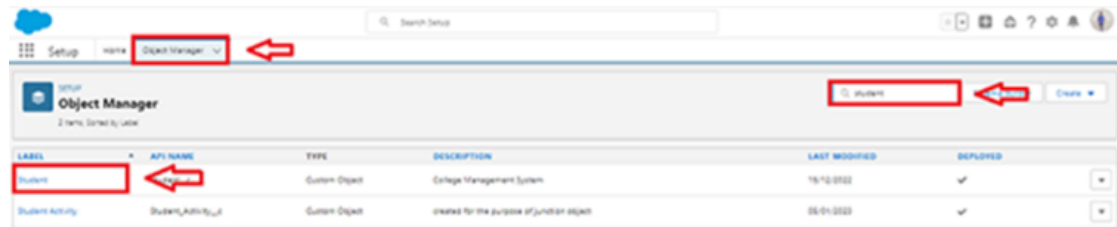
5. Field Name will be auto populated, and click on Next→ Next → Save.

## Activity 2 : Creating Junction Object :

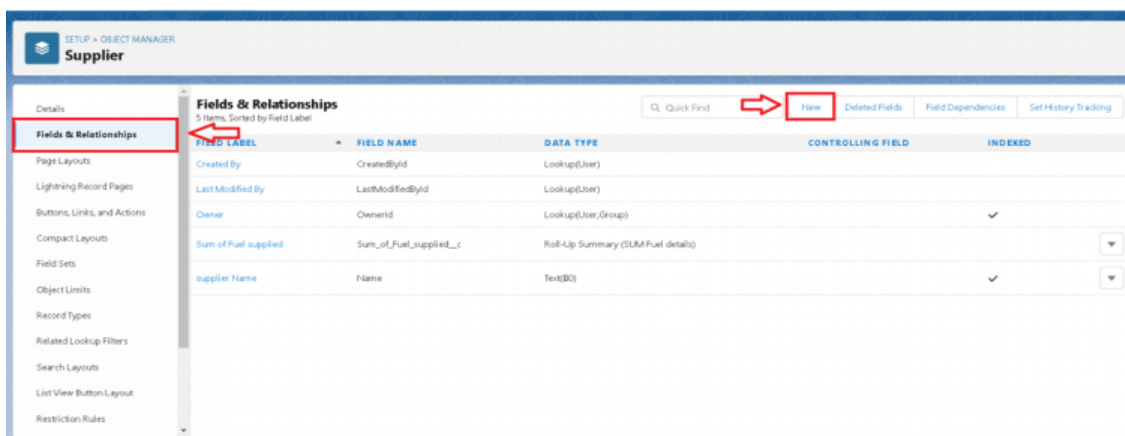
A Junction object is a custom object that serves as a bridge between two related objects in a many-to-many relationship. It allows you to create a relationship between records of two different objects by creating a many-to-many relationship model.

Creating junction object as rice details with supplier & rice mill  
To create junction object

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



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



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

Smartinternz Salesforce Internship  
Digesh Sose

Supplier

Details

Fields & Relationships

5 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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)		✓

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

Data Type

☐ None Selected Select one of the data types below

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

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

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

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

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

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

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

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

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

New Relationship

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.

### **Activity 3 : 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**

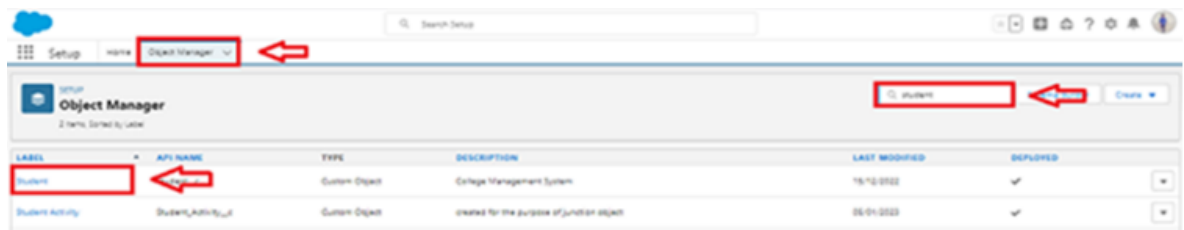
1. Go to the setup page → click on object manager → From drop down click edit for consumer object.
2. Click on fields & relationship → click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. Select the related object “ rice mill”.
5. Give Field Label as “rice mill name” and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

### **Activity 4 : Creating the Roll-up Summary**

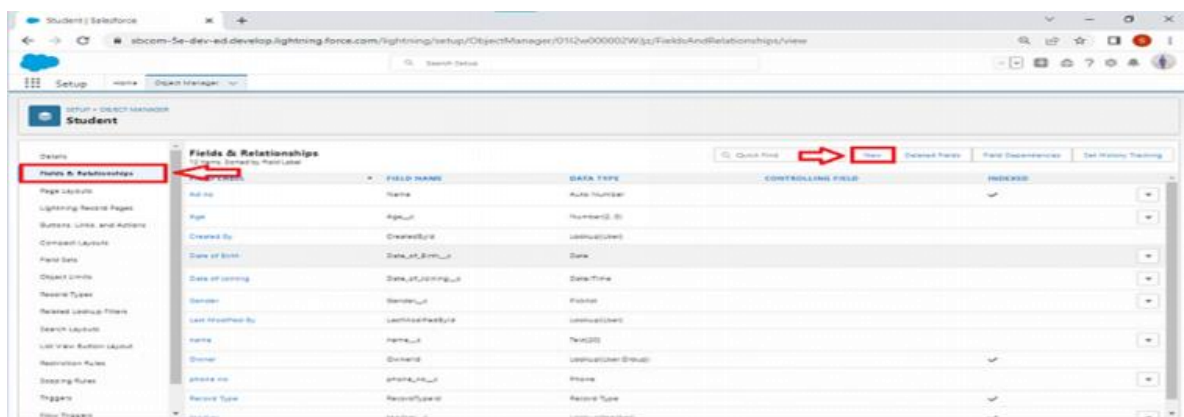
**A rollup summary field is a field that summarizes data from a child object to a parent object that shares a master-detail relationship. Rollup summary fields can use the COUNT, SUM, MIN, and MAX functions. For example, you could use a rollup summary field to display the total value (amount of rice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

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

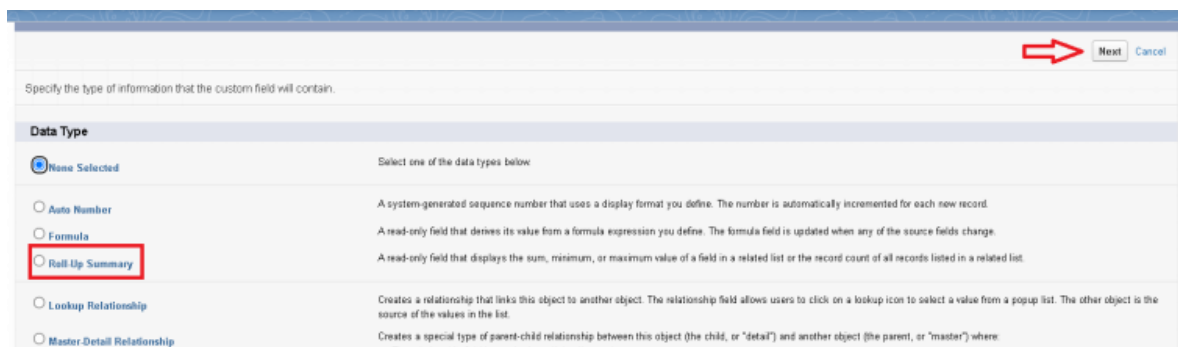
1. Go to setup → click on Object Manager → type object name(**supplier**) in search bar → click on the object.



2. Now click on “Fields & Relationships” → New



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



4. Give the Field label as “ sum of rice distributed ”,Field Name will be Auto

The screenshot shows the 'New Custom Field' wizard in Salesforce. It is at Step 2 of 5, 'Enter the details'. The 'Field Label' is '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. The 'Auto add to custom report type' checkbox is checked, with the text 'Add this field to existing custom report types that contain this entity'.

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 'Define the summary calculation' wizard in Salesforce. It is at Step 3 of 5. The 'Master Object' is 'seller' and the 'Summarized Object' is 'rice details'. The 'Roll-Up Type' is 'SUM' and the 'Field to Aggregate' is 'rice distributed'. The 'Filter Criteria' is 'All records should be included in the calculation'.

8. Follow the same steps for the rice mill Object from 1 to 3

9. Give the Field label as “ rice distributed to shops ”,Field Name will be Auto generated, and click Next.



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

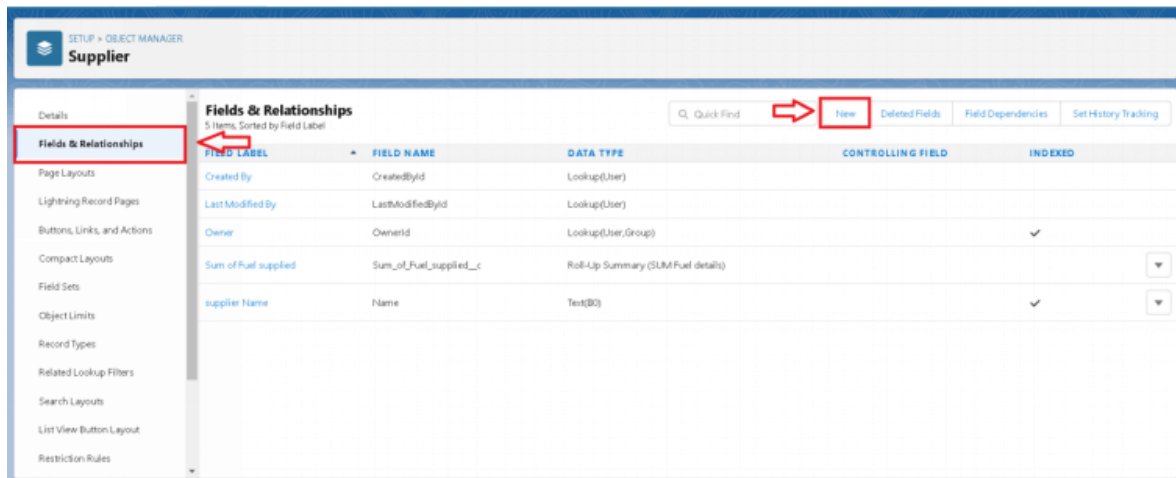
.

## **Activity 5 : Creating Fields in Objects**

### **Creating the number field in rice details object**

6. Go to the setup page → click on object manager → From drop down click edit for rice details object.
7. Click on fields & relationship → click on New.

Smartinternz Salesforce Internship  
Digesh Sose



8. Select Data type as “Number” and click Next.

9. Given the Field Label as “ supplier name ” and length as “ 5 ”.

Step 2: Enter the details

Previous Next Cancel

Field Label

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  10

Decimal Places  0

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

10. Field Name will be auto populated, and click on Next→ Next → Save.

## Activity 6: Creating Fields in rice mill Objects

1. Select Data type as “Number” and click Next.

2. Given the Field Label as “ rice price/kg ” and length as “ 5 ”

## Activity 7: Creating Fields in consumer Objects

S.no	Object name	Fields	data type
1.	consumer	First name	Text
		Last name	Text
		Phone number	phone
		email	email

		<table><tr><td>email</td><td>email</td></tr><tr><td>Rice taken by shops</td><td>Number (length=5)</td></tr><tr><td>Rice type</td><td>(<u>Picklist</u> values) 1.basmati 2.normal rice</td></tr><tr><td>Mode of payment</td><td><u>Picklist</u> values<ul style="list-style-type: none"><li>● Credit card</li><li>● Debit card</li><li>● Net banking</li><li>● UPI</li><li>● Cash</li></ul></td></tr></table>	email	email	Rice taken by shops	Number (length=5)	Rice type	( <u>Picklist</u> values) 1.basmati 2.normal rice	Mode of payment	<u>Picklist</u> values <ul style="list-style-type: none"><li>● Credit card</li><li>● Debit card</li><li>● Net banking</li><li>● UPI</li><li>● Cash</li></ul>
email	email									
Rice taken by shops	Number (length=5)									
Rice type	( <u>Picklist</u> values) 1.basmati 2.normal rice									
Mode of payment	<u>Picklist</u> values <ul style="list-style-type: none"><li>● Credit card</li><li>● Debit card</li><li>● Net banking</li><li>● UPI</li><li>● Cash</li></ul>									

### Activity 8 : Creating Cross Object Formula Field in consumer Object

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

**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

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

Formula Return Type

☒ None Selected Select one of the data types below:

<input type="radio"/> Checkbox	Calculate a boolean value. Example: <code>TODAY() &gt; 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 datetime, for example, by adding a number of hours or days to another datetime. Example: <code>Time + 2400000000</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**

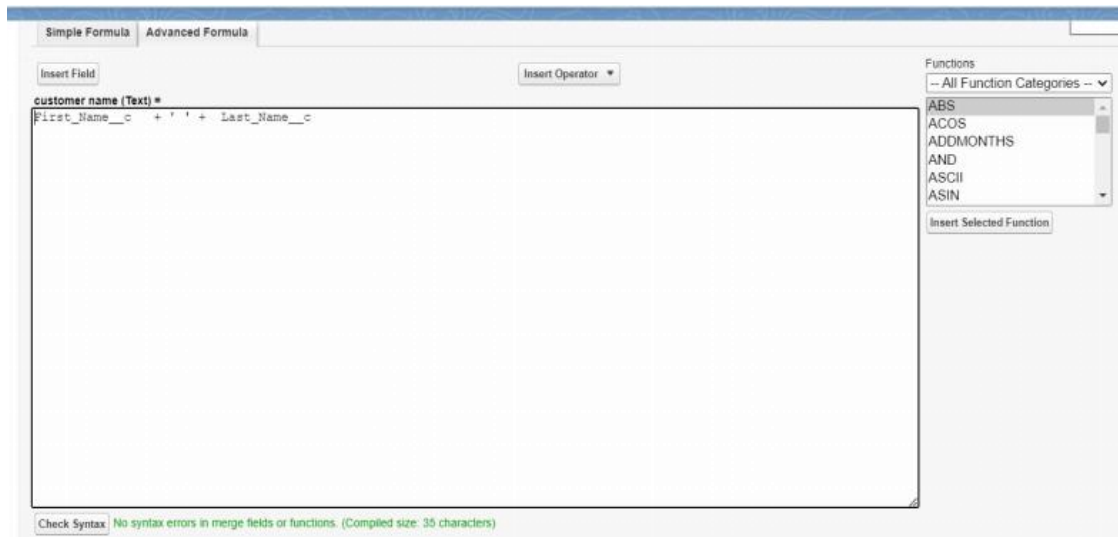
6. Under Advanced Formula write down the formula and click “Check Syntax” and Save.



### 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.



## Activity 9 : Creating the validation rule

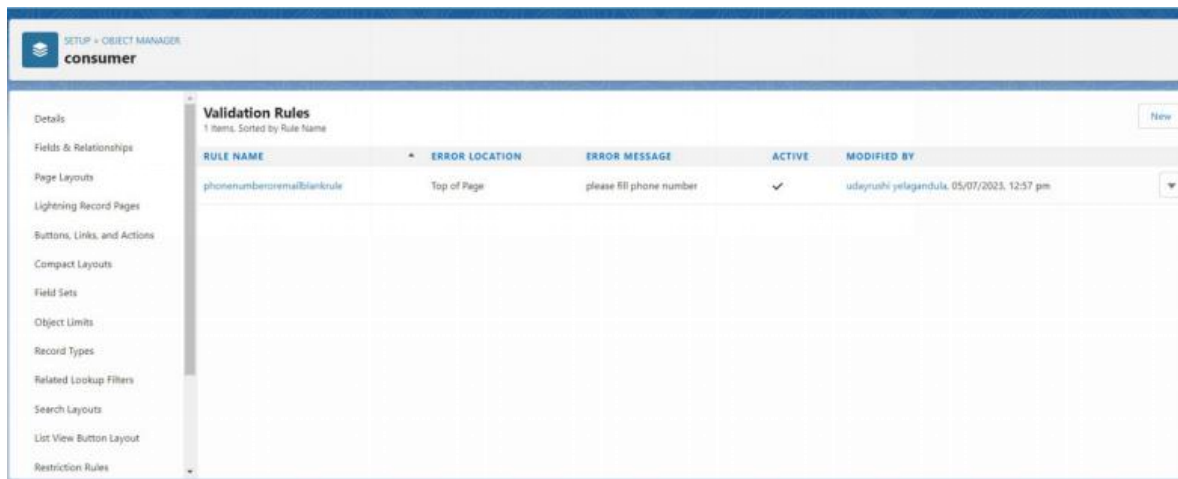
Improve the quality of your data using validation rules. Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns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

### Creating the validation rule for phone number field in consumer object

**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.

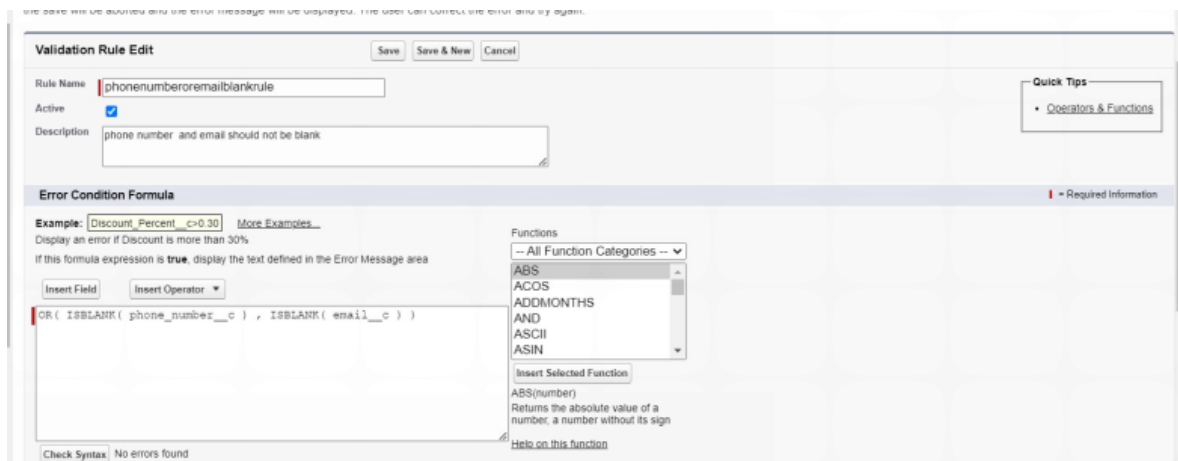
Smartinternz Salesforce Internship  
Digesh Sose



The screenshot shows the Salesforce Setup interface for the 'consumer' object. The 'Validation Rules' section is active, displaying a table with one rule.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
phonenumeroemailblankrule	Top of Page	please fill phone number	✓	udeyrushi.pelagandula, 05/07/2023, 12:57 pm

3. Enter the Rule name as “Phonenumeroemailblankrule”.
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' screen for the rule 'phonenumeroemailblankrule'. The 'Active' checkbox is checked. The description is 'phone number and email should not be blank'. The error condition formula is entered as 'OR( ISBLANK( phone\_number\_\_c ) , ISBLANK( email\_\_c ) )'. A functions list is open on the right, showing 'ABS' selected. The 'Check Syntax' button indicates 'No errors found'.

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

## 8. Save the validation rule.

The screenshot shows the Salesforce Validation Rule Editor. At the top, there are tabs for 'Insert Field' and 'Insert Operator'. The main text area contains the formula: `OR( ISBLANK( phone_number__c ) , ISBLANK( email__c ) )`. To the right, a dropdown menu is open, showing a list of functions: ACOS, ADDMONTHS, AND, ASCII, and ASIN. Below the dropdown is a button labeled 'Insert Selected Function'. Further down, the function 'ABS(number)' is described: 'Returns the absolute value of a number, a number without its sign'. A link 'Help on this function' is also present. A 'Check Syntax' button is located at the bottom left of the formula area.

**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

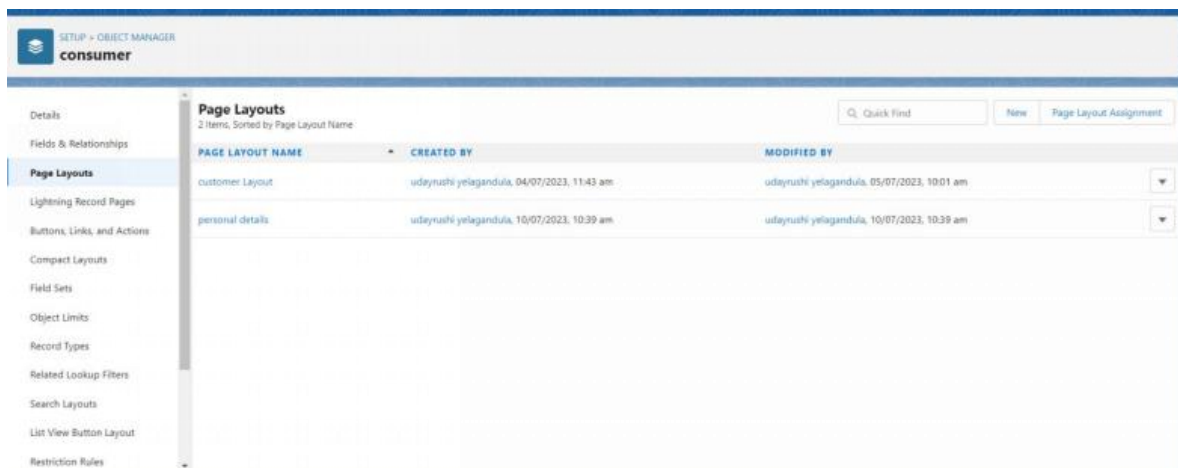


**Page Layout in Salesforce allows us to customize the design and organize detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.**

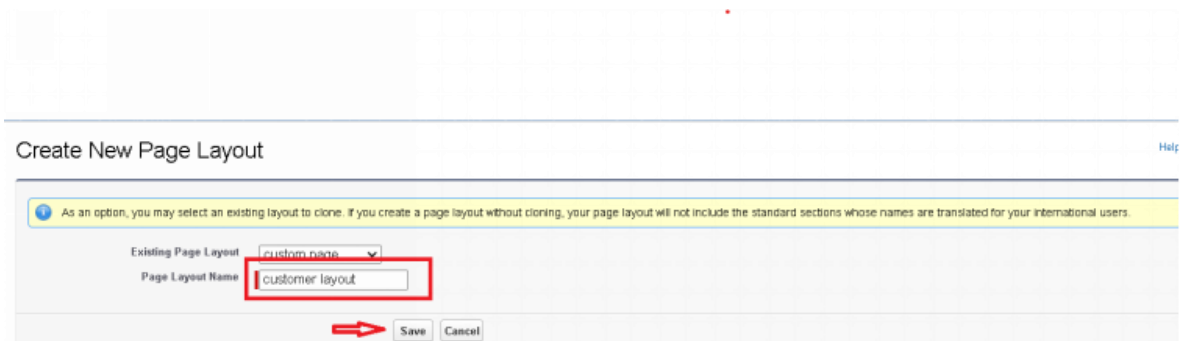
### **Activity 1 : creating the page layout**

**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.

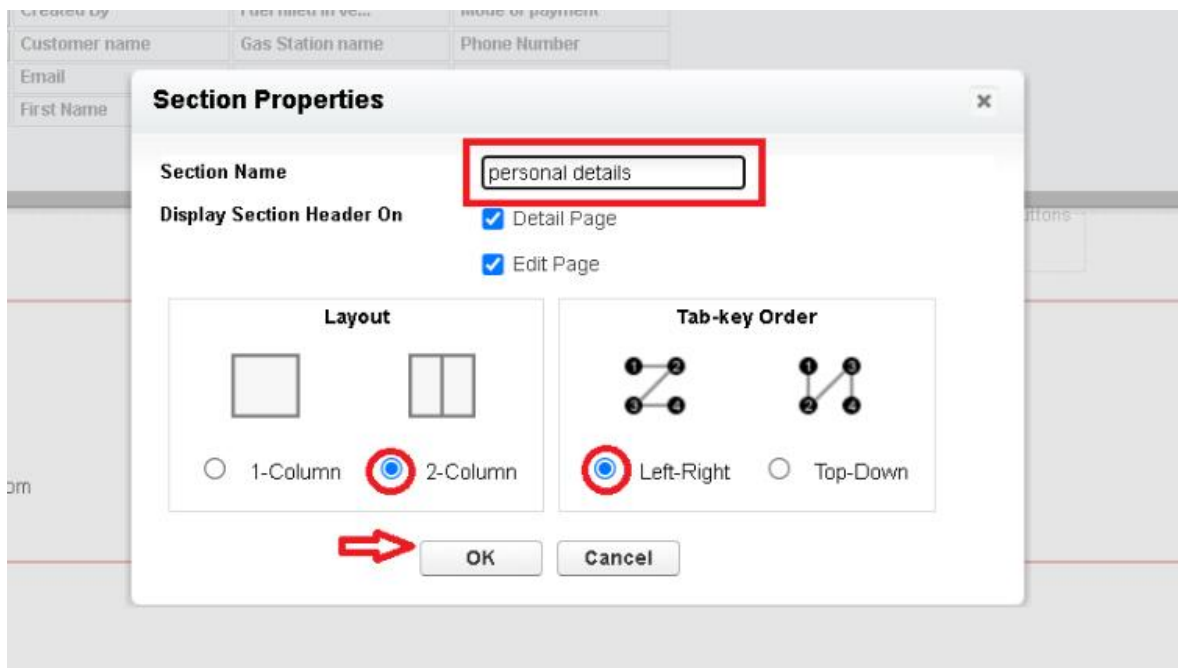


3. Select the existing page layout, and give the page layout name as “consumer layout”, and click save.



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

5. Enter the section name as “Personal details”, → click Ok.
6. Now drag the fields to this section that mentioned , they are
  1. First name , last name , consumer name , phone number, email, rice mill name.



7. Follow the same process for another two sections as shown above , they are
8. One section is “ rice details ” , drag the fields that are
  1. Rice taken by shop, rice type.
9. Another section is “Receipt details ”, and drag the fields that are
  1. Mode of payment , Amount paid.
10. Then , Click save

Smartinternz Salesforce Internship  
Digesh Sose

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

**Fields**

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists
- Report Charts

Quick Find Field Name

Section	customer Name	last name	rice taken by shops
Blank Space	email	mode of payments	rice type
	amount paid	first name	phone number
	Created By	Last Modified By	rice mill name

**product info**

rice type	Sample Text
rice taken by shops	47.917

**personal details**

first name	Sample Text
last name	Sample Text
customer Name	GEN-2004-001234
phone number	1-415-555-1212
email	sarah.sample@company.com
rice mill name	Sample Text

**receipt details**

mode of payments	Sample Text
amount paid	313.59

## 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.**

- 1. Contract Manager**
- 2. Read Only**
- 3. Marketing User**
- 4. Solutions Manager**
- 5. Standard User**
- 6. 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.**

## **Activity 1: owner Profile**

**To create a new profile:**

Smartinternz Salesforce Internship  
Digesh Sose

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

The screenshot shows the 'Profiles' page in Salesforce Setup. The 'Profile Detail' section is visible, showing the profile name 'owner', user license 'Salesforce', and a description. The 'Page Layouts' section is also visible, showing various layouts assigned to the profile.

Profile Detail	
Name	owner
User License	Salesforce
Description	
Created By	udaynishi.yelagandula 10/07/2023, 10:56 am
Modified By	udaynishi.yelagandula 10/07/2023, 10:56 am

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

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

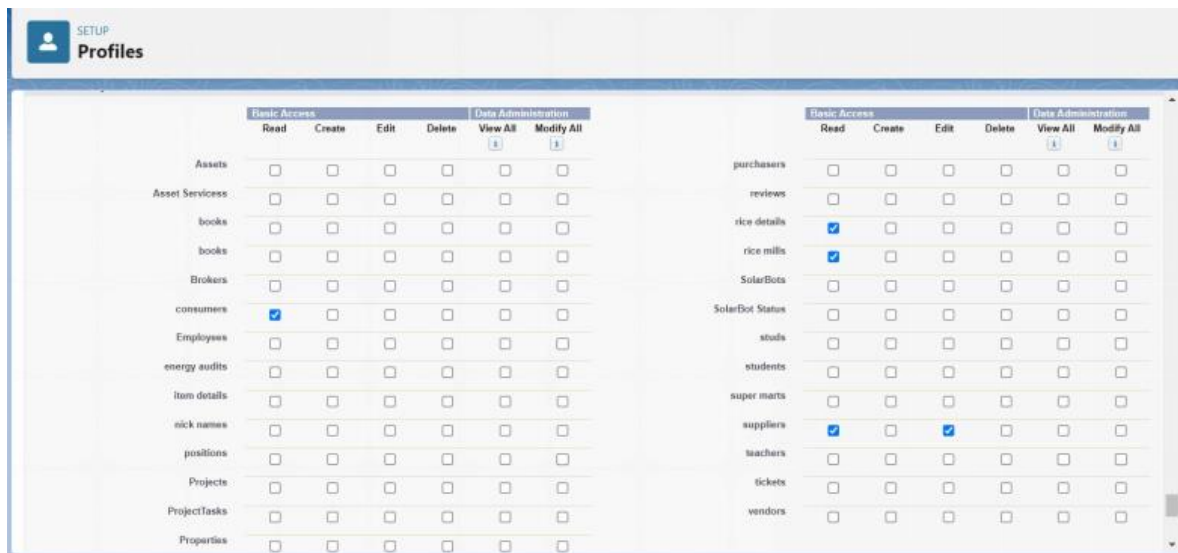
The screenshot shows the 'Custom Object Permissions' section of the Salesforce Setup Profiles page. It displays a table with columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All) for various objects. The 'consumers', 'rice details', 'rice mills', and 'suppliers' objects are highlighted with checkmarks in the 'Read', 'Create', 'Edit', and 'Delete' columns.

	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"/>
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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
rice mills	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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"/>

3. Give access and save it.

## Activity 2: 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 with the 'employer' profile selected. The 'Custom Object Permissions' section is expanded, showing a table of permissions for various objects. The 'Basic Access' and 'Data Administration' tabs are visible at the top of the table. The 'Basic Access' tab is active, showing checkboxes for Read, Create, Edit, and Delete permissions. The 'Data Administration' tab is also visible, showing checkboxes for View All and Modify All permissions. The objects listed include 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. The permissions for 'consumers', 'rice details', 'rice mills', and 'suppliers' are highlighted in blue, indicating they are checked.

	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"/>	<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"/>
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 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.**

### Activity 3: worker Profile

1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (Standard Platform User) → enter profile name (worker) → Save.
2. **While still on the profile page, then click Edit.**

3. Select the Custom App settings as default for the rice mill.
4. Scroll down to Custom Object Permissions and Give access permissions for consumer, rice details , rice mill and suppliers objects as mentioned in the below diagram.

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
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"/>

	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 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"/>

5. And click save.

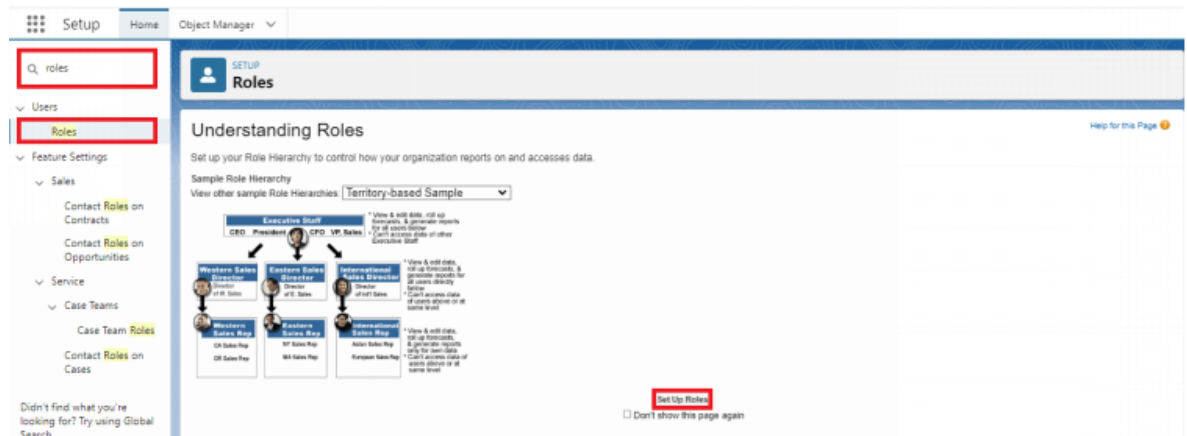
## Role and Role Hierarchy

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

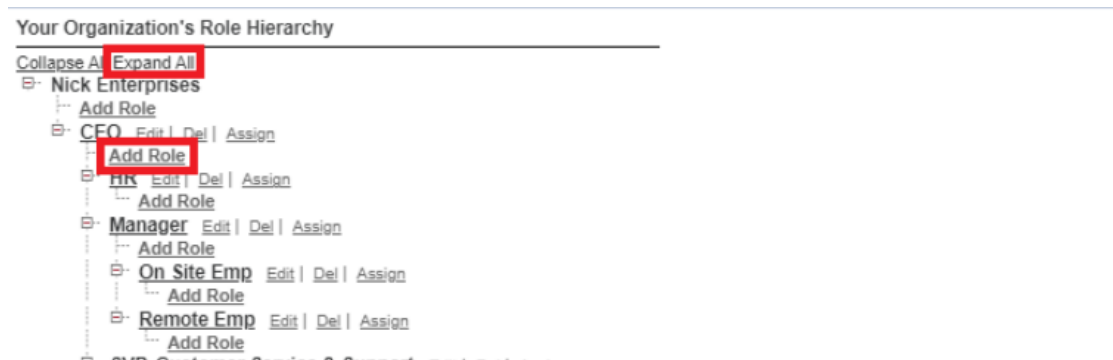
## Activity 1: Creating owner Role

### Creating owner Role:

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



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



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



The screenshot shows the Salesforce 'New Role' setup page. The page has a blue header with a user icon and the text 'SETUP Roles'. Below the header, the page title is 'New Role' with a 'Help for this Page' link. The main section is titled 'Role Edit' and contains four input fields: 'Label' (set to 'OWNER'), 'Role Name' (set to 'OWNER'), 'This role reports to' (set to 'CEO'), and 'Role Name as displayed on reports' (empty). At the bottom of the form are three buttons: 'Save', 'Save & New', and 'Cancel'.

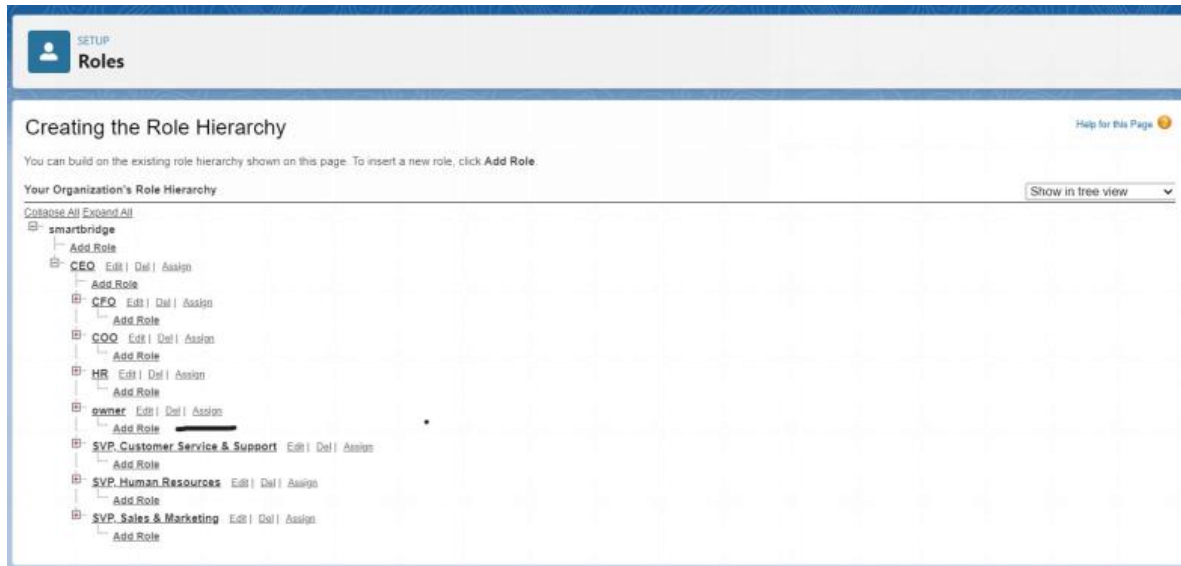
2. Click and save it.

## Activity 2: Creating employer roles

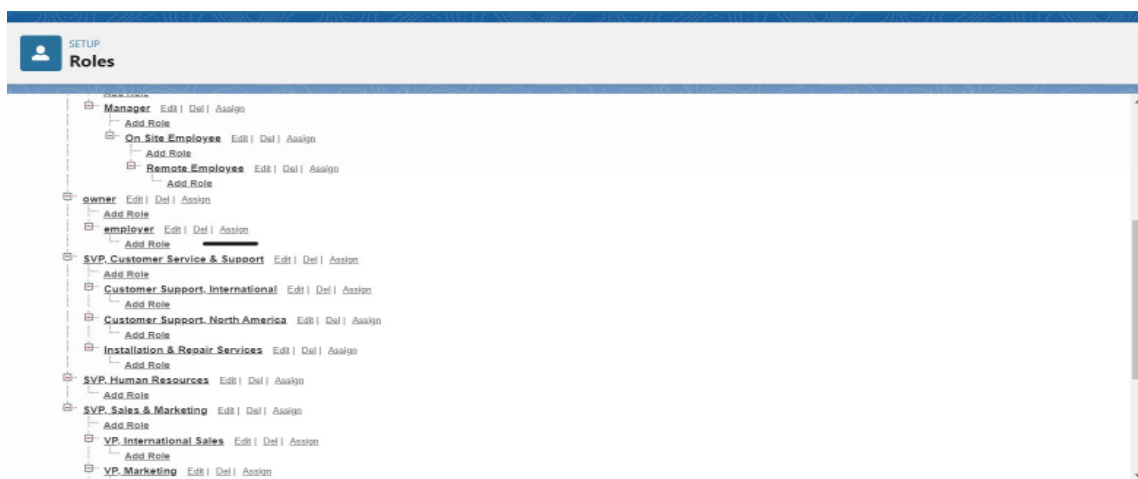
### Creating another two roles under manager

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.

Smartinternz Salesforce Internship  
Digesh Sose



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



6. 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.**

### **Activity 1: 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 'User Edit' page in Salesforce. The user being edited is 'vicky y'. The page has a 'General Information' section with fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Role' is set to 'owner', 'User License' is 'Salesforce', and 'Profile' is 'owner'. The 'Active' checkbox is checked. There are also checkboxes for 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', and 'WDC User'. The 'Data.com User Type' is set to '--None--'. At the bottom, there is a 'Data.com Monthly Addition Limit' of 300. The page has a 'Save', 'Save & New', and 'Cancel' button bar at the top.

Save it.

## Activity 2: creating another users

12. Go to setup → type users in quick find box → select users → click New user.

13. Fill in the fields

14. First Name: ram

15. Last Name: ram

16. Alias: Give a Alias Name

17. Email id: Give your Personal Email id

18. Username: Username should be in this form: text@text.text

19. Nick Name: Give a Nickname

**20. Role: employer**

**21. User license: Salesforce platform**

**22. Profiles: standard platform user.**

The screenshot shows the 'User Edit' page in Salesforce. The user being edited is 'vicky y'. The page is divided into two main sections: 'General Information' and 'Permissions'. The 'General Information' section includes fields for First Name (vicky), Last Name (y), Alias (vy), Email (ramesh0820@gmail.com), Username (ramesh0820@754123gmail), Nickname (vicky), Title, Company, Department, and Division. The 'Permissions' section includes a Role dropdown (owner), User License dropdown (Salesforce), Profile dropdown (owner), and checkboxes for Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. The 'Data.com User Type' dropdown is set to 'None--' and the 'Data.com Monthly Addition Limit' is set to 300. The page has a 'Save' button, a 'Save & New' button, and a 'Cancel' button. A 'Help for this Page' link is also visible.

**23. Go to setup → type users in quick find box → select users → click New user.**

**24. Fill in the fields**

**25. First Name: ragu**

**26. Last Name: raj**

**27. Alias: Give a Alias Name**

**28. Email id: Give your Personal Email id**

**29. Username: Username should be in this form: text@text.text**

**30. Nick Name: Give a Nickname**

**31. Role: worker**

### 32. User license: Salesforce platform

### 33. Profiles: standard platform user.

The screenshot shows the 'User Edit' page in Salesforce Setup. The user being edited is 'ragu raj'. The page is divided into two main sections: 'General Information' and 'Role & Profile'. The 'General Information' section includes fields for First Name (ragu), Last Name (raj), Alias (raj), Email (ramesh0820@gmail.com), Username (ramesh0820@73690gmail), Nickname (raj), Title, Company, Department, and Division. The 'Role & Profile' section includes a Role dropdown (worker), User License dropdown (Salesforce Platform), Profile dropdown (Standard Platform User), and a list of checkboxes for various user types: Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Data.com User Type (None). A 'Data.com Monthly Addition Limit' of 300 is also visible.

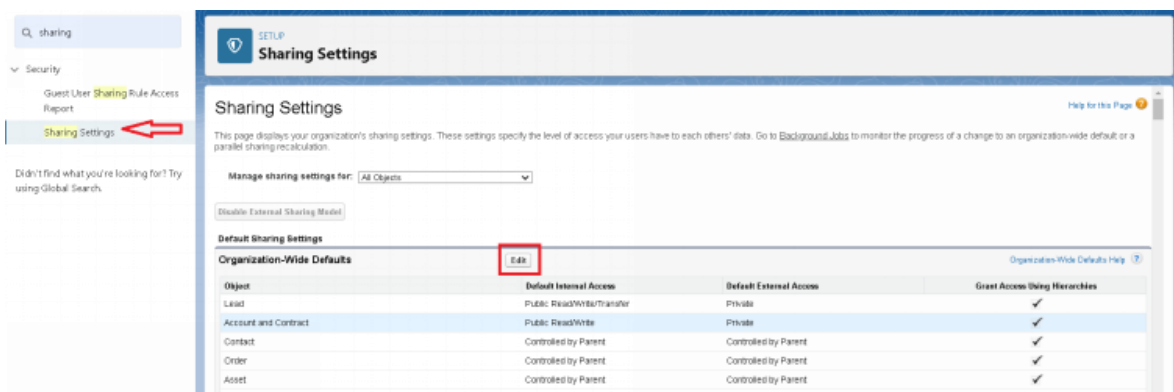
## Permission Sets

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access

without changing their profiles and are the recommended way to manage your users' permissions.

## Activity 1: Creating OWD setting.

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



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.

**Note :** create the latest “10” records in consumer objects.

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

## Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and

**share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.**

In Salesforce.com we can easily generate reports in different styles. And can create reports in a very short time and also schedule the reports. Salesforce provides a powerful suit of analytic tools to help you organize, view and analyze your data.

### **Types of Reports in Salesforce**

- 1. Tabular**
- 2. Summary**
- 3. Matrix**
- 4. Joined Reports**

**1. Tabula Reports:** Simple listing of data without any subtotals. This type of reports provide you most basically to look at your data. Use tabular reports when you want a simple list or a list of items with a grand total.

Example: This type of reports are used to list all accounts, List of contacts, List of opportunities.....etc.....

**2. Summary Reports:** This type of reports provide a listing of data with groupings and sub totals. Use summary reports when you want subtotals based on the value of a particular field or when you want to create a hierarchically grouped report, such as sales organized by year and then by quarter.

Example: All opportunities for your team sub totaled by Sales Stage and Owner.

**3. Matrix Reports:** This type of reports allow you to group records both by row and by column. A comparison of related totals, with totals by both row and column. Use matrix reports when you want to see data by two different dimensions that aren't related, such as date and product.

Example: Summarize opportunities by month vertically and by account horizontally.

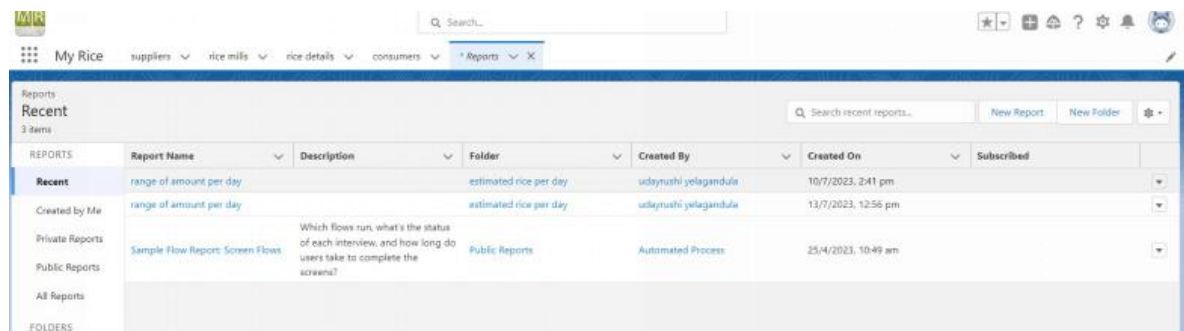
**4. Joined Reports:** Blocks of related information in a single report. This type of reports enable you to adopt five different blocks to display different types of related data. Each block can own unique columns, summary fields, formulas, filters and sort order. Use joined reports to group and show data from multiple report types in different views.



Example: You can build a report to show opportunity, case and activity data for your accounts.

## Activity 1: Create Report

1. Go to the app → click on the reports tab
2. Click New Report.



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



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

2.rice type

3.rice price/kg

4.mode of payments

5.amount paid

2. Remove the unnecessary fields.

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

a. Rice taken by shops.

REPORT ▼  
New rice mills with consumers Report

rice mills with consumers

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

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

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

Smartinternz Salesforce Internship  
Digesh Sose

Report: rice mills with consumers  
range of amount per day

Enable Field Editing

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

rice taken by shops	consumer: consumer name	rice type	rice price/kg	mode of payments	amount paid
5 (2)	A-0001	basmati	50	Net banking	250.00
	A-0005	normal rice	50	Cash	250.00
Subtotal			50		500.00
6 (2)	A-0002	normal rice	50	Cash	300.00
	A-0004	basmati	50	Cash	300.00
Subtotal			50		600.00
8 (1)	A-0003	normal rice	50	Cash	400.00
Subtotal			50		400.00
10 (1)	A-0006	basmati	50	Cash	500.00
Subtotal			50		500.00
12 (1)	A-0007	basmati	50	Cash	600.00
Subtotal			50		600.00
15 (1)	A-0008	basmati	50	Cash	750.00

Row Counts: ☒    Detail Rows: ☒    Subtotals: ☒    Grand Total: ☒

## Activity 2: 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

Enable Field Editing

rice taken by shops	consumer: consumer name	rice type	rice price/kg	mode of payments	amount paid
8 (1)	A-0001	normal rice	50	Cash	400.00
Subtotal			50		400.00
10 (1)	A-0006	basmati	50	Cash	500.00
Subtotal			50		500.00
12 (1)	A-0007	basmati	50	Cash	600.00
Subtotal			50		600.00
15 (1)	A-0008	basmati	50	Cash	750.00
Subtotal			50		750.00
16 (1)	A-0010	normal rice	50	Cash	800.00
Subtotal			50		800.00
18 (1)	A-0009	normal rice	50	Cash	900.00
Subtotal			50		900.00
80 (1)	A-0011	basmati	50	Net banking	4,000.00
Subtotal			50		4,000.00
Total (11)			50		9,050.00

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

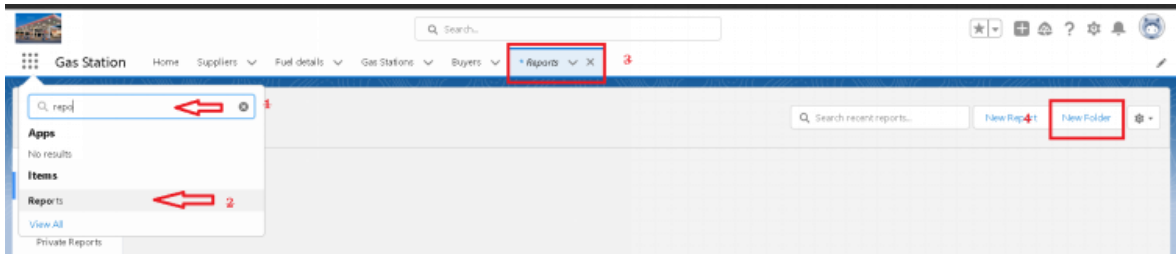
3. After selecting the run report as a “another person” select your personal account or whom you want to send that mail to.
4. Click save.

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

### **Activity 3: create a report folder**

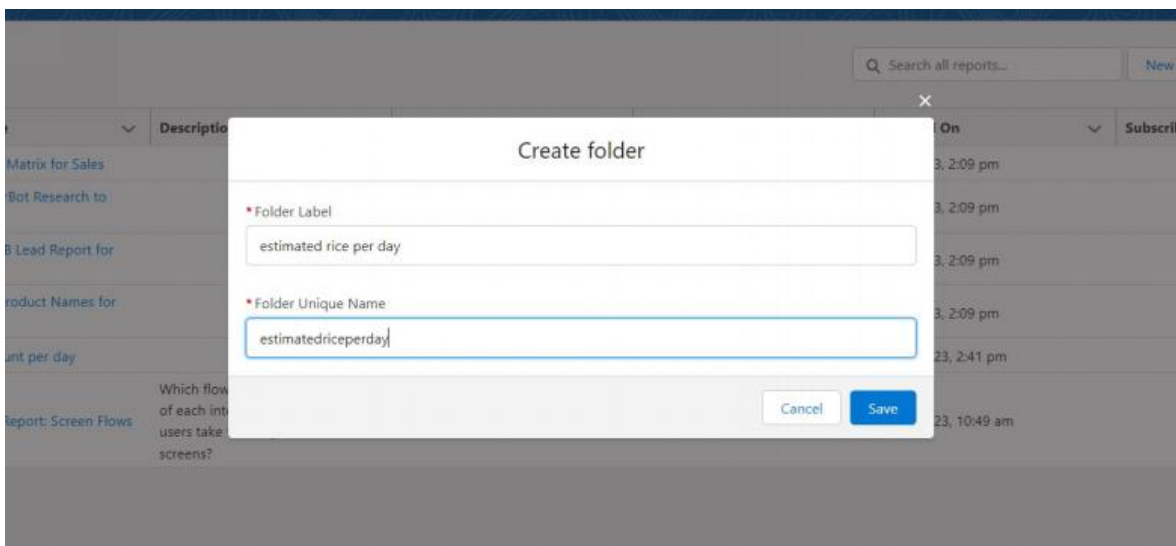
1. Click on the app launcher and search for reports.
2. Double click on the report, “ reports tab” will be auto populated in the navigation bar.

**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.**

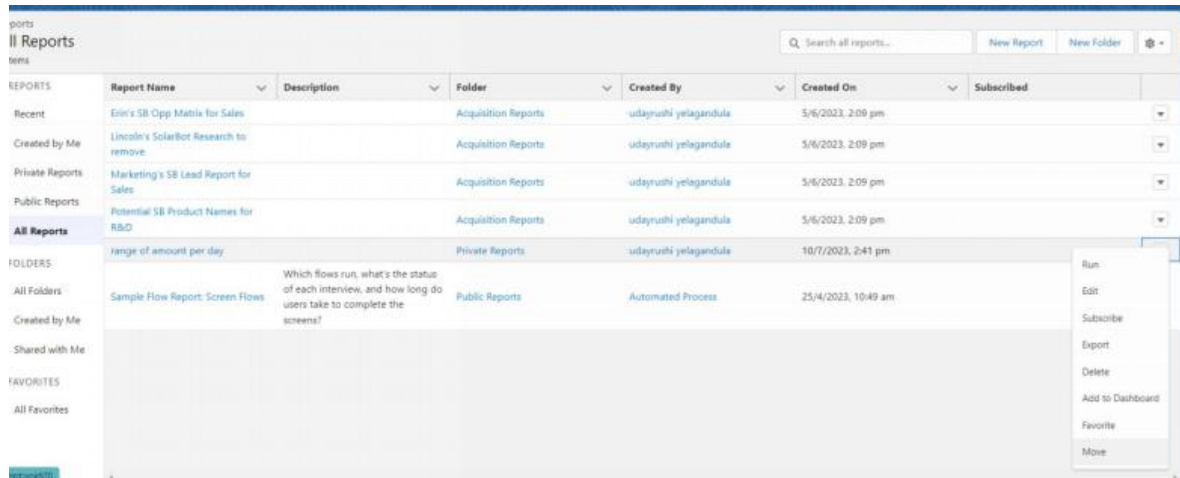


**1.navigate to app launcher and click reports on that.**

**2.click all reports.**

**3. Select the range of amount per day drop down in that click move.**

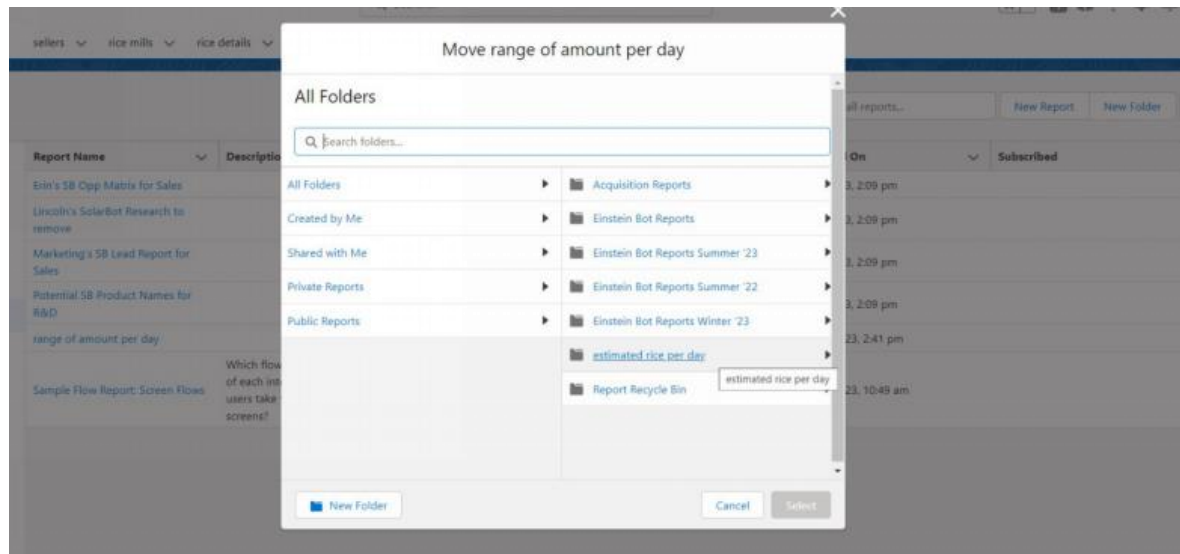
Smartinternz Salesforce Internship  
Digesh Sose



The screenshot shows the Salesforce Reports interface. On the left, there are navigation tabs: 'REPORTS', 'FOLDERS', and 'FAVORITES'. The 'REPORTS' tab is active, displaying a table of reports. The table has columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. A context menu is open over the report 'range of amount per day', showing options like 'Run', 'Edit', 'Subscribe', 'Export', 'Delete', 'Add to Dashboard', 'Favorite', and 'Move'.

Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Eric's SB Opp Matrix for Sales	Acquisition Reports	udayrushi yelagandula	5/6/2023, 2:09 pm	
Created by Me	Lincoln's SolarBot Research to remove	Acquisition Reports	udayrushi yelagandula	5/6/2023, 2:09 pm	
Private Reports	Marketing's SB Lead Report for Sales	Acquisition Reports	udayrushi yelagandula	5/6/2023, 2:09 pm	
Public Reports	Potential SB Product Names for R&D	Acquisition Reports	udayrushi yelagandula	5/6/2023, 2:09 pm	
All Reports	range of amount per day	Private Reports	udayrushi yelagandula	10/7/2023, 2:41 pm	
FOLDERS	Sample Flow Report: Screen Flows	Public Reports	Automated Process	25/4/2023, 10:49 am	

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



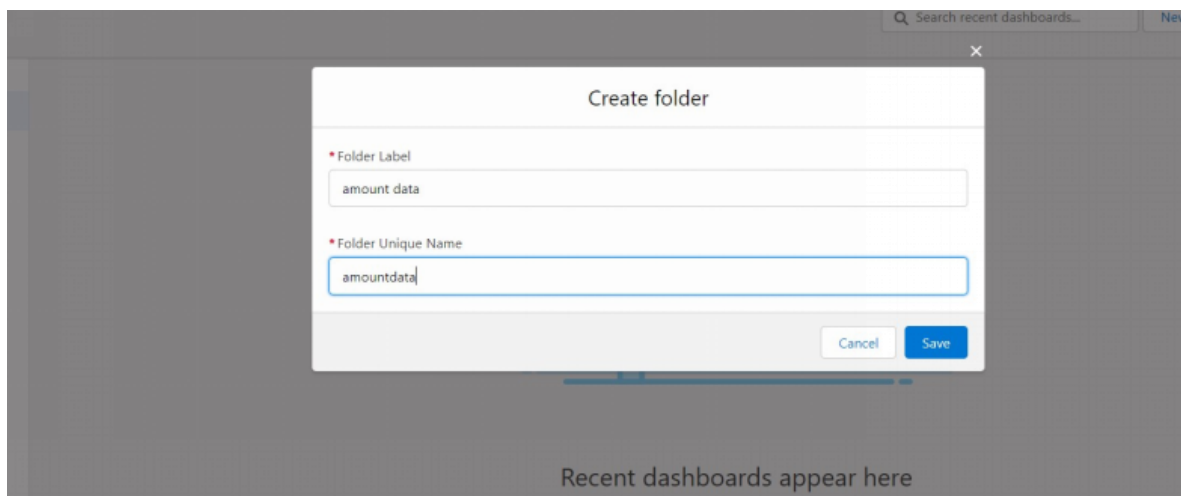
**Note:** if you want to see the report which you have created then go to reports - all folders - estimated rice per day - your report will appear in this way.

## Dashboards

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

### Activity 1: Create Dashboard Folder

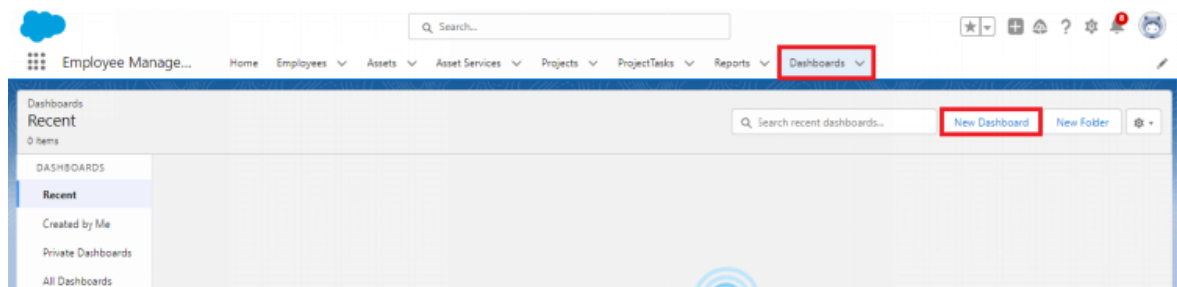
1. Click on the app launcher and search for the dashboard.
2. Click on the dashboard tab.
3. Click the new folder, give the folder label as “ amount data dashboard”.
4. Folder unique names will be auto populated.
5. Click save.



### Activity 2: Create Dashboard

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

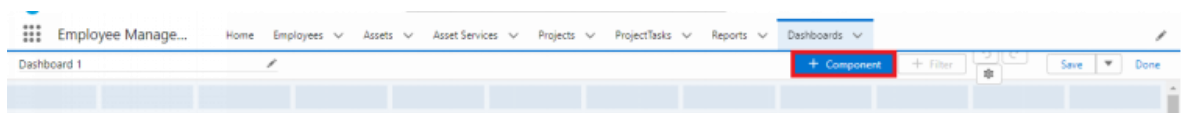
Smartinternz Salesforce Internship  
Digesh Sose



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

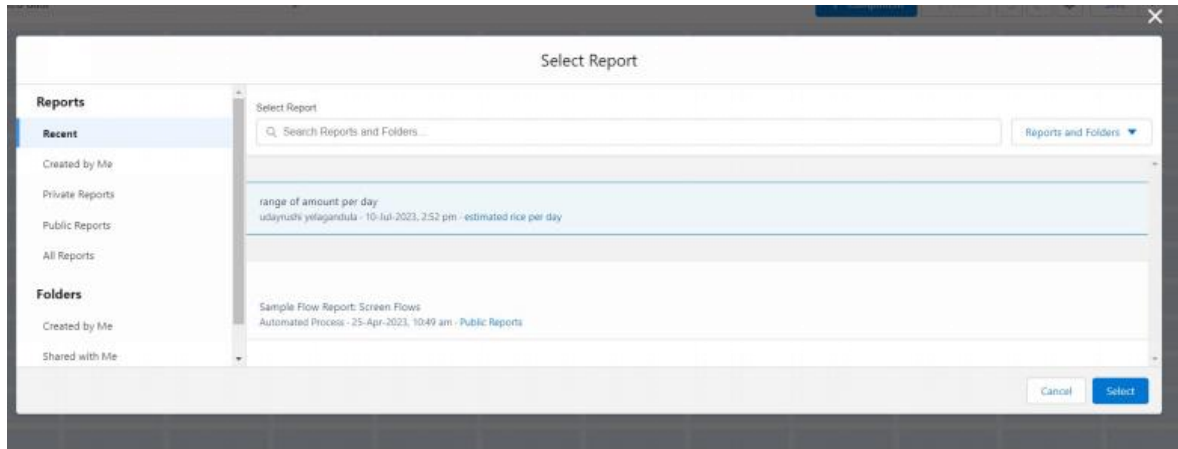
A screenshot of the 'New Dashboard' dialog box. The dialog has a title bar with a close button. It contains three input fields: 'Name' with the value 'estimated data', 'Description' with the value 'total amount of data in dashboards', and 'Folder' with the value 'amount data'. There is a 'Select Folder' button next to the folder input. At the bottom right, there are 'Cancel' and 'Create' buttons. The 'Create' button is highlighted.

1. Select add component.

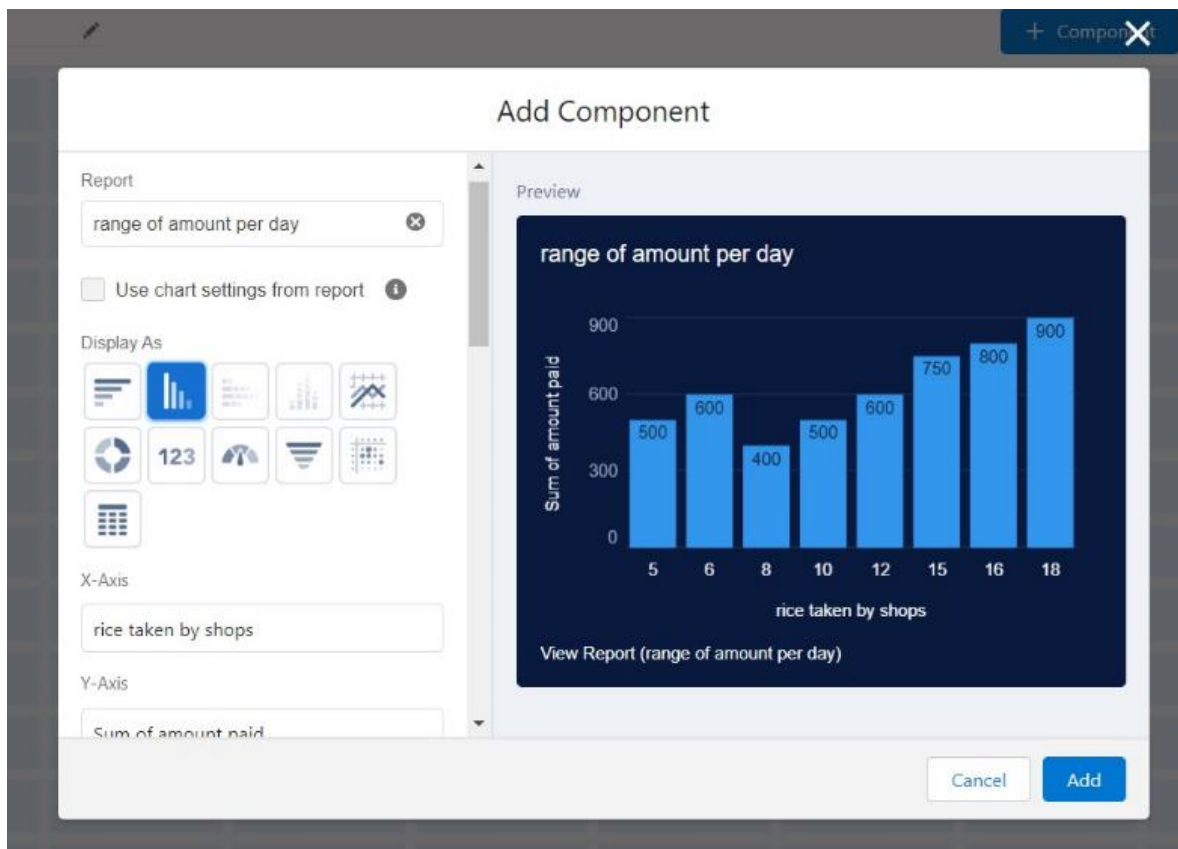


1. Select a Report and click on select.





1. Preview is shown below.



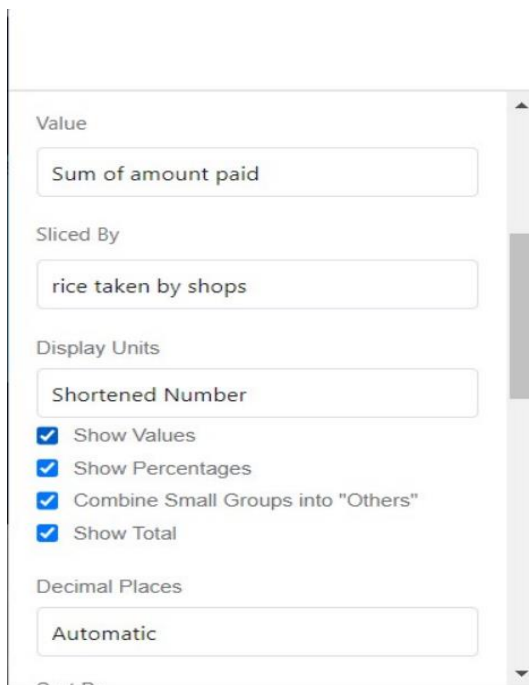
Display as- vertical bar chart

**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**



The image shows a configuration panel for a Salesforce component. It includes the following settings:

- Value:** Sum of amount paid
- Sliced By:** rice taken by shops
- Display Units:** Shortened Number
- Checkboxes:**
  - ☒ Show Values
  - ☒ Show Percentages
  - ☒ Combine Small Groups into "Others"
  - ☒ Show Total
- Decimal Places:** Automatic

Click add.  
Click save and done.

