

CRM APPLICATION FOR WHOLESALE RICE MILL

Overview

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

Features and Functionality

Reporting and Dashboards

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

RollupSummary Field

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

Cross-Object Formula Field

- Purpose: References fields from another object in Salesforce.
- Function: Calculates the total amount payable by multiplying the number of rice units taken by the price per kg.

Validation Rules

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

Permission Sets

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

Milestone 1 - Salesforce

Introduction

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

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

What Is Salesforce?

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

Activity 1: Creating a Developer Account

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

Go to the Signup Page

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

Fill Out the Signup Form

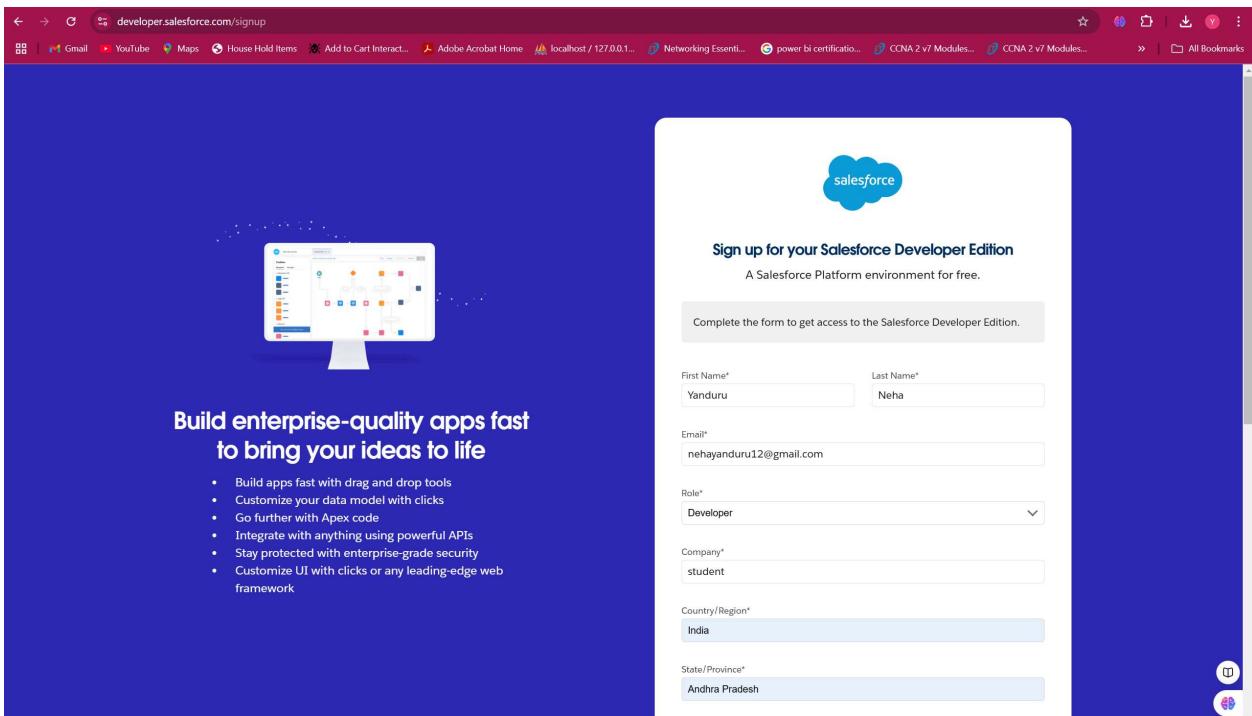
- First Name : Yanduru
- Last Name : Neha

- Email :nehayanduru12@gmail.com
- Role : Developer
- Company : student
- Country : India
- Postal Code : 521230
- Username :nehayanduru12@lbrce6.com

Submit the Form

- After filling in the details,click on the "Sign me up" button.

You have successfully created a Salesforce Developer Account. You will receive a confirmation email with further instructions to complete the setup.



Country/Region
India

State/Province
Andhra Pradesh

Postal Code*
521230

Username*
nehayanduru12@lbrc6.com

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

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

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

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

Sign me Up

Already have a Salesforce Developer Environment?
[Log in](#)

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Activity 2: Account Activation

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

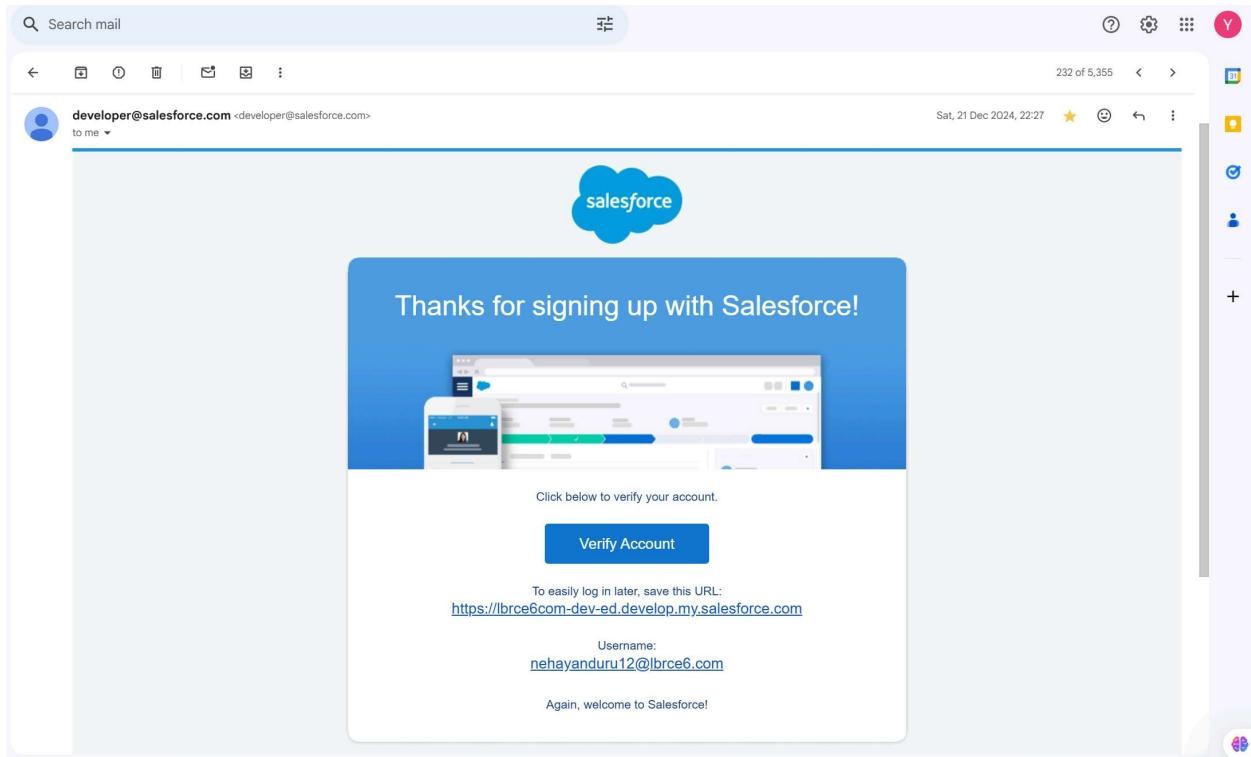
Check Your Email

- Go to the inbox of the email address you used while signing up. The verification email may take 5-10 minutes to arrive.

Verify Your Account

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

Click on "Change Password".



Milestone 2 - Object

What Is an Object?

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

Types of Salesforce Objects

Salesforce objects are of two types:

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

To Navigate to Setup Page:

- Click on the gear icon
- Click on Setup

To Create an Object:

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

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

The screenshot shows the 'New Custom Object' page in the Salesforce Setup. The 'Label' field is set to 'Account' and the 'Plural Label' field is set to 'Accounts'. Other visible fields include 'Record Name' (set to 'Account'), 'Data Type' (set to 'Text'), and 'Optional Features' (with 'Allow Reports' checked). The page includes standard Salesforce navigation and status bars.

Activity 1: Create Supplier Object

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

Navigate to Setup Page:

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

Create a Custom Object:

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

Define the Custom Object:

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

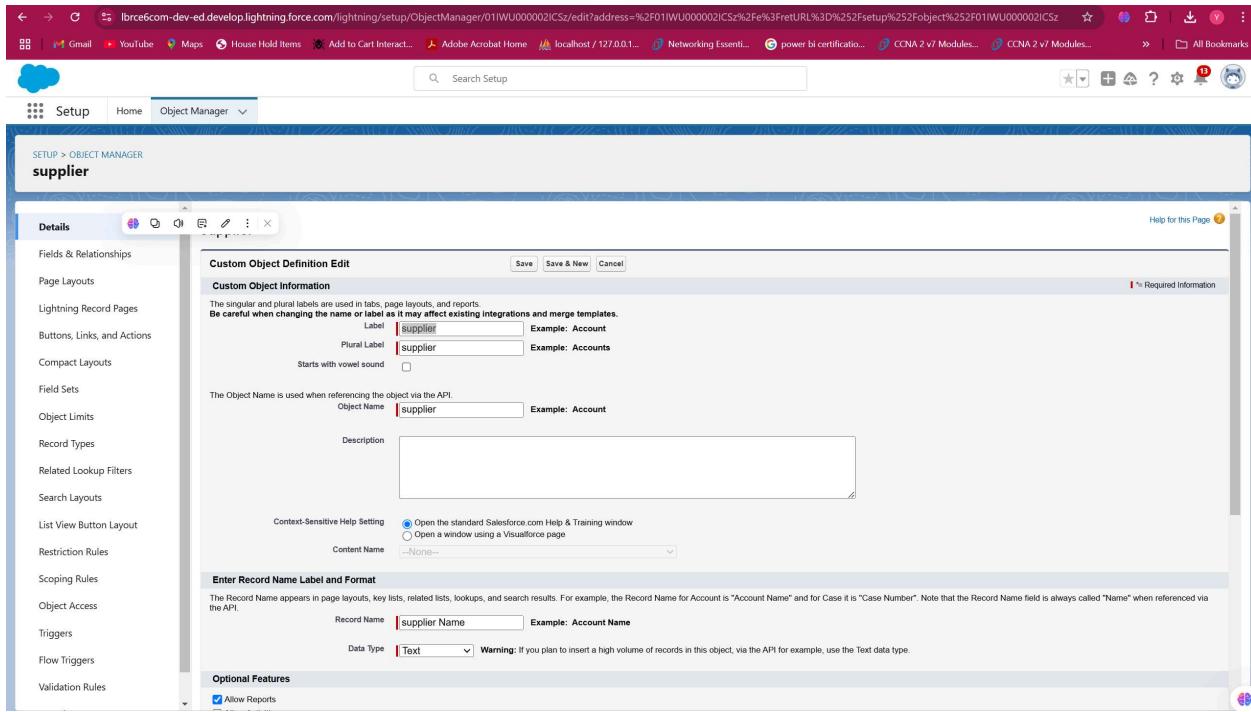
Set Additional Options:

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

Save the Custom Object:

- Click on Save.+

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



Activity 2: Create Rice Mill Object

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

Navigate to Setup Page:

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

Create a Custom Object:

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

Define the Custom Object:

- Enter the Label Name: Rice Mill.

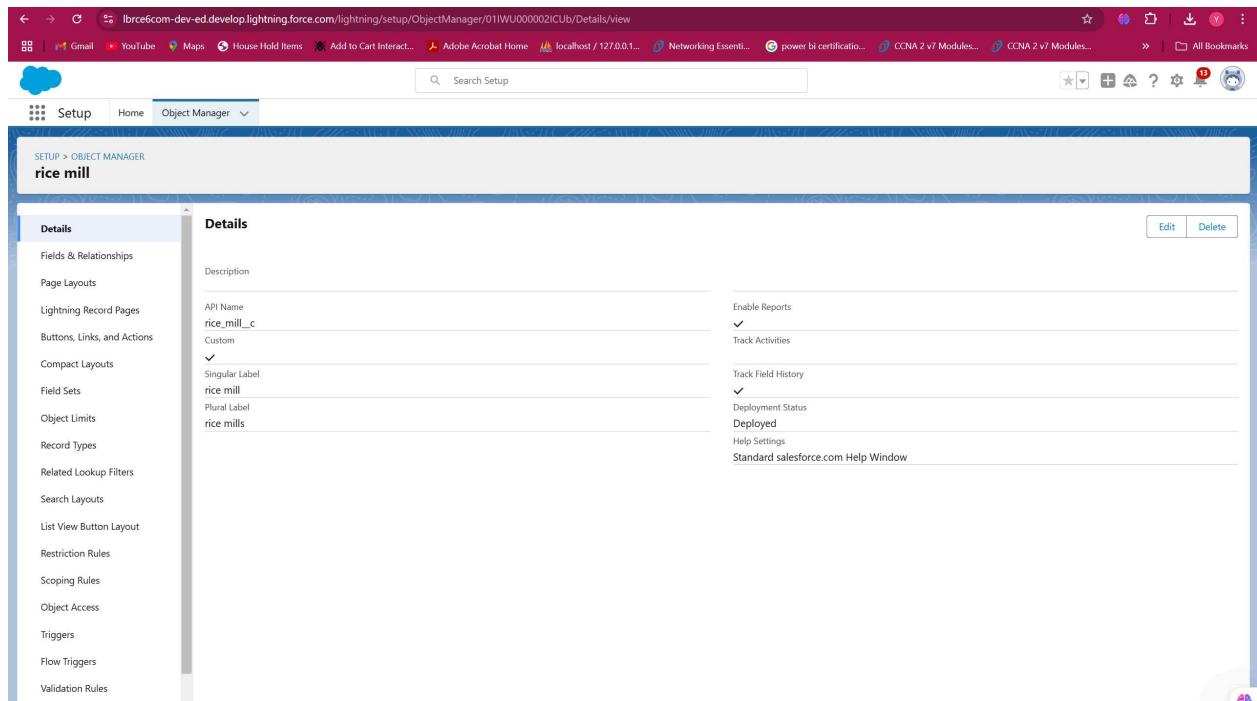
- Enter the Plural Label Name: Rice Mills.
- Enter the Record Name Label and Format:
- Record Name: Leave it blank.
- Data Type: Auto Number
- DisplayFormat: rice-{000}
- StartingNumber: 1

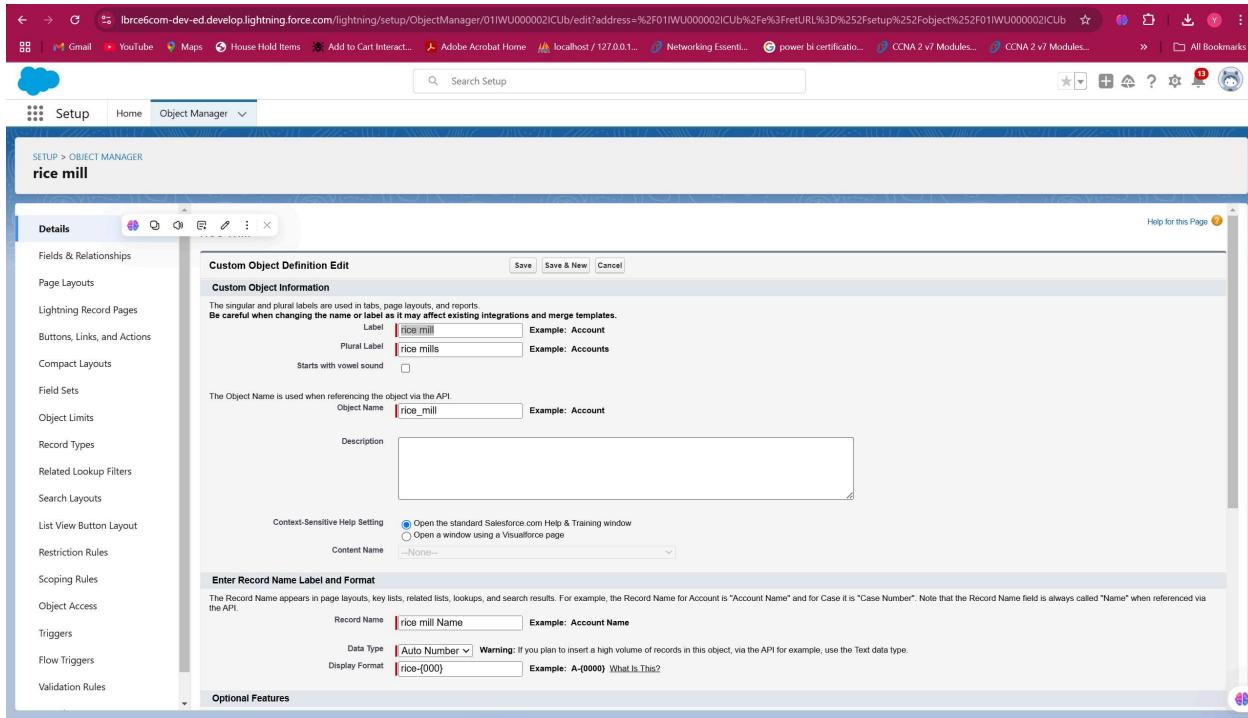
Set Additional Options:

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

Save the Custom Object:

- Click on **Save**.





Activity 3: Create Consumer Object

To create a Consumer object in Salesforce, follow the same steps as mentioned in Activity2 for creating the Rice Mill object. Use the following details for the Consumer object:

Navigate to Setup Page:

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

Create a Custom Object:

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

Define the Custom Object:

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

Set Additional Options:

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

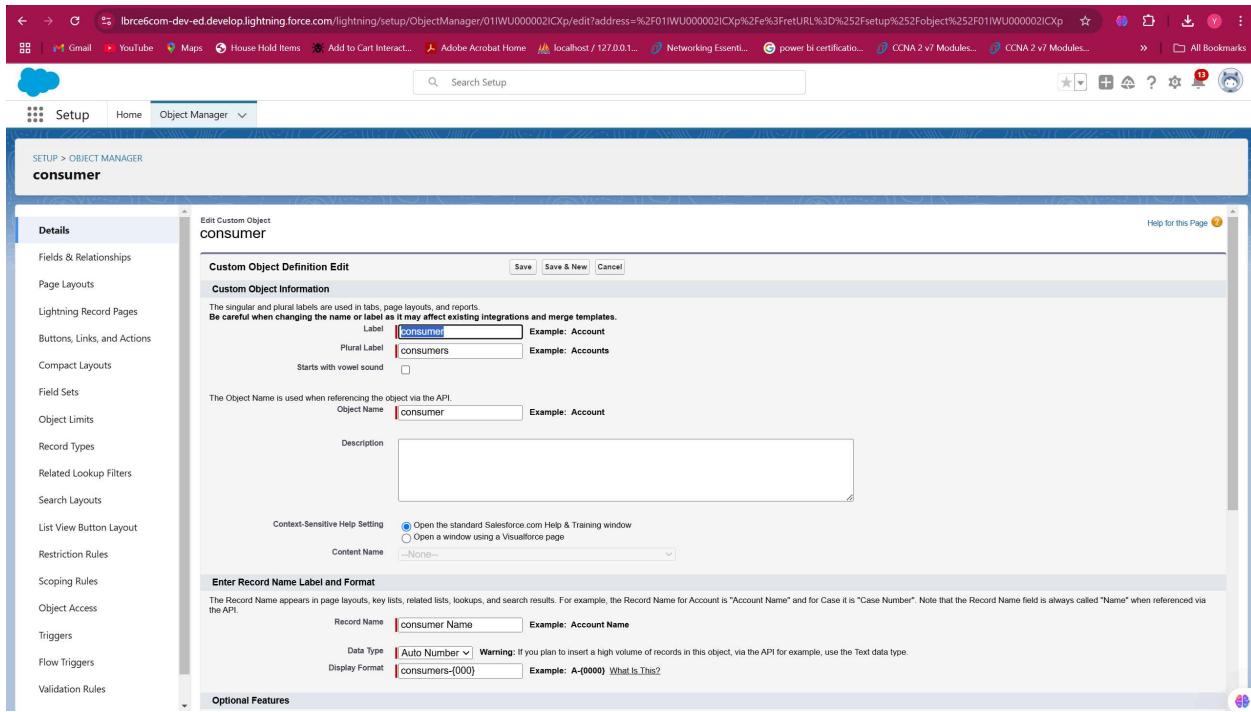
Save the Custom Object:

- Click on Save.

The screenshot shows the Salesforce Setup interface for creating a new custom object named "consumer". The "Details" tab is active, displaying the following configuration:

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

The left sidebar lists other tabs for managing the object's setup, such as Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, and Validation Rules.



Activity 4: Create Rice Details Object

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

Navigate to Setup Page:

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

Create a Custom Object:

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

Define the Custom Object:

- Enter the Label Name: Rice Details.

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

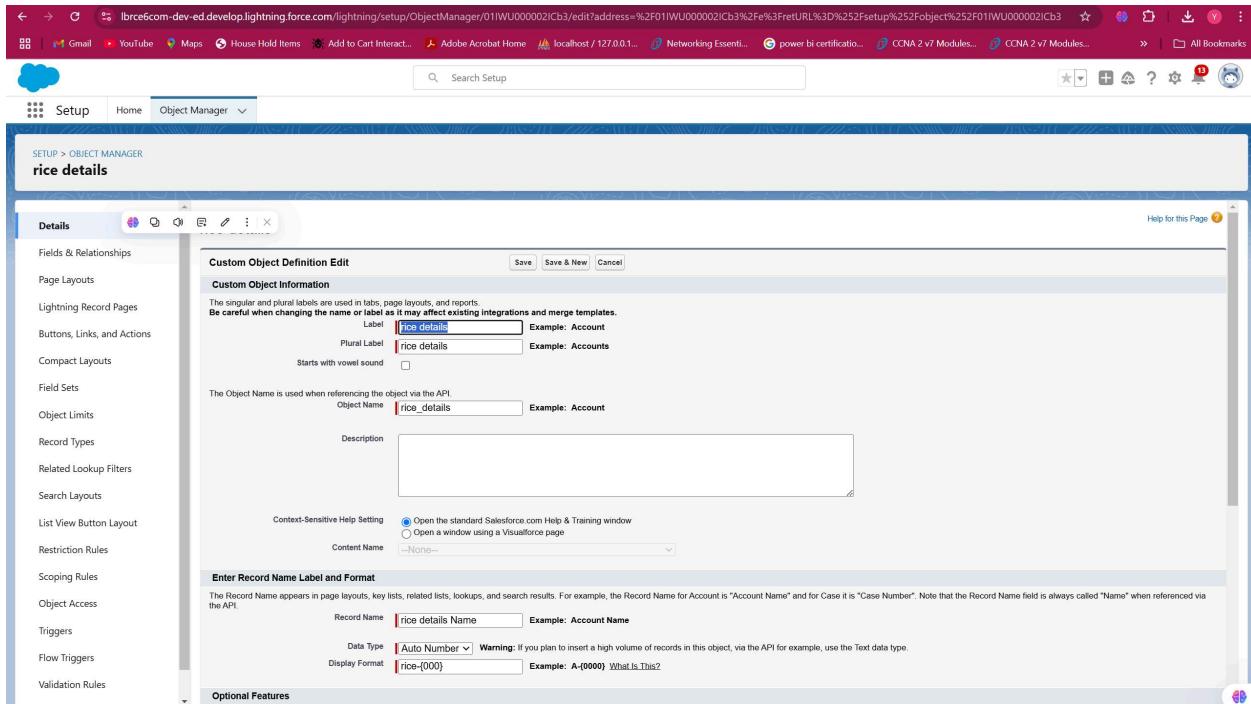
Set Additional Options:

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

Save the Custom Object:

- Click on Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "rice details". On the left, a sidebar lists various object settings like Fields & Relationships, Page Layouts, and Buttons, Links, and Actions. The main content area is titled "Details" and contains fields for API Name (rice_details__c), Singular Label (rice details), and Plural Label (rice details). It also includes sections for Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). At the bottom right are "Edit" and "Delete" buttons.



Milestone 3 - Tabs

What is a Tab?

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

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

Activity 1: Creating a Custom Tab (Supplier)

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

Navigate to Setup Page:

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

Create a New Custom Object Tab:

- Click on New under the Custom ObjectTabs section.

Select Object and Tab Style:

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

Add to ProfilesPage:

- Keep it as default.
- Click on Next.

Add to Custom App:

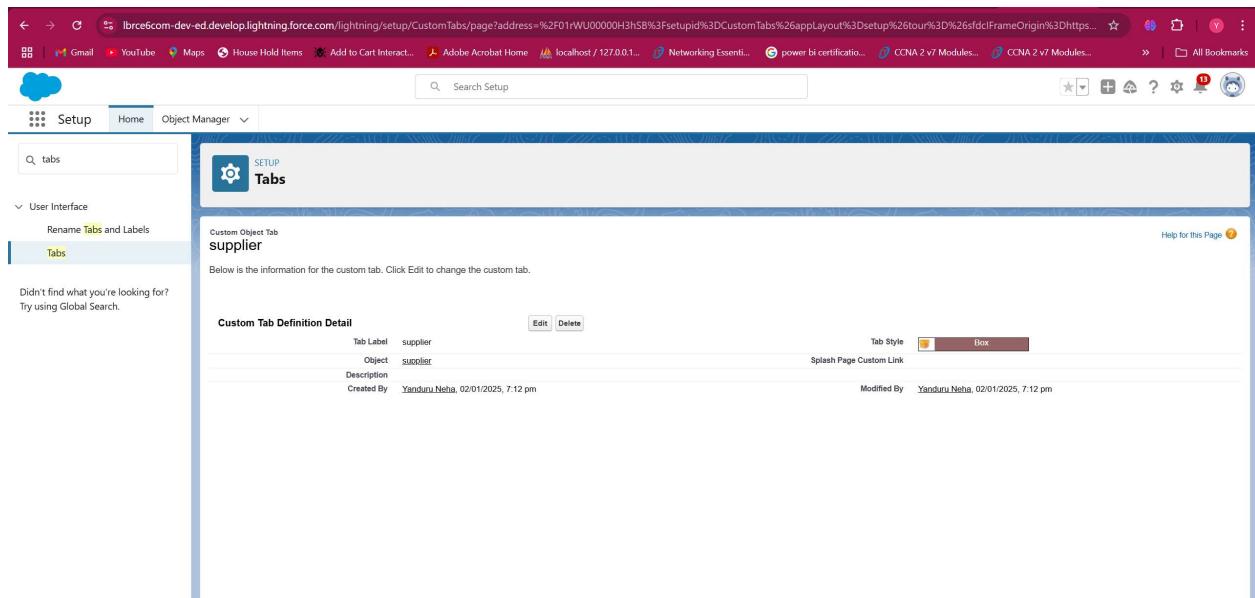
- Uncheck the IncludeTab checkbox.

Append Tab to Users' ExistingPersonal Customizations:

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

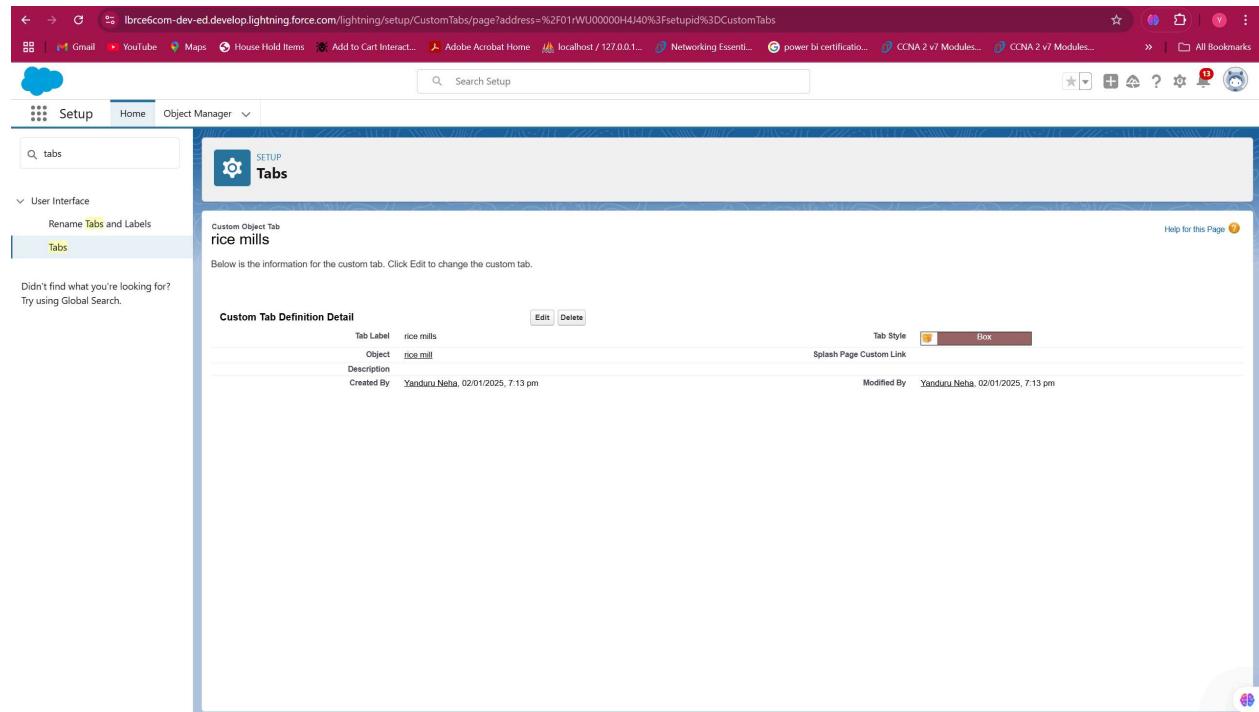
Save the Custom Tab:

- Click on Save.



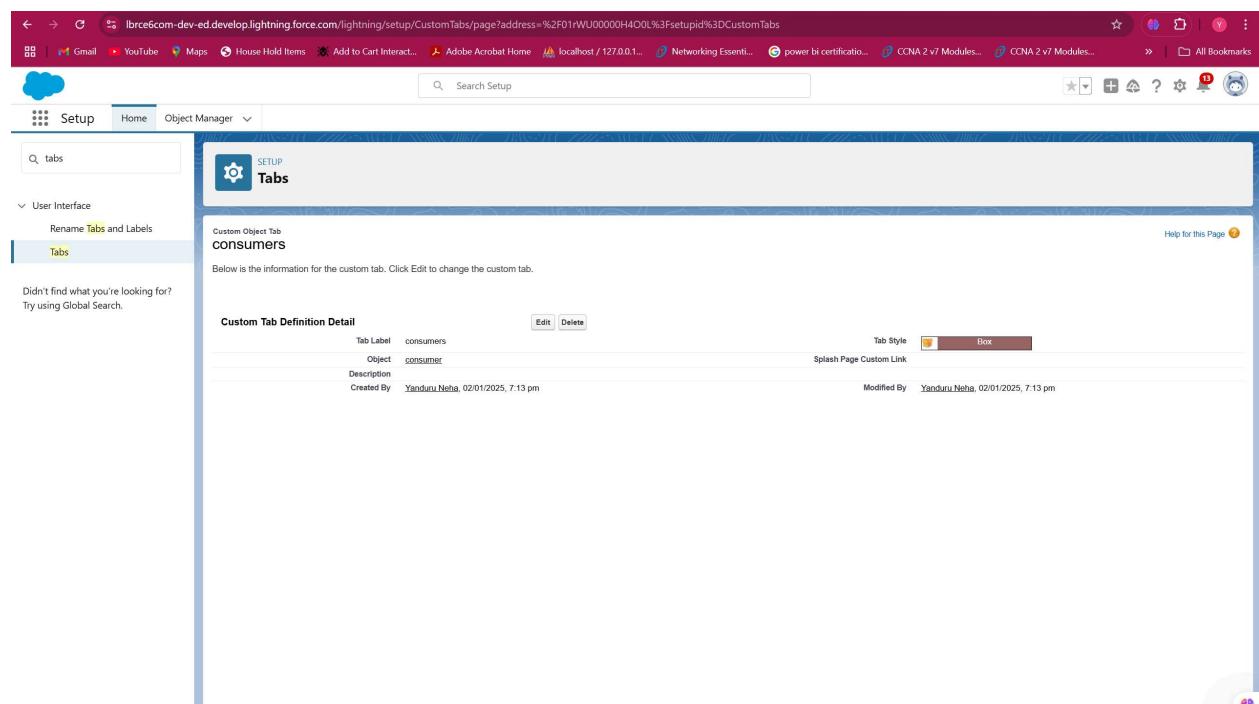
Activity 2: Creating Remaining Tabs

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



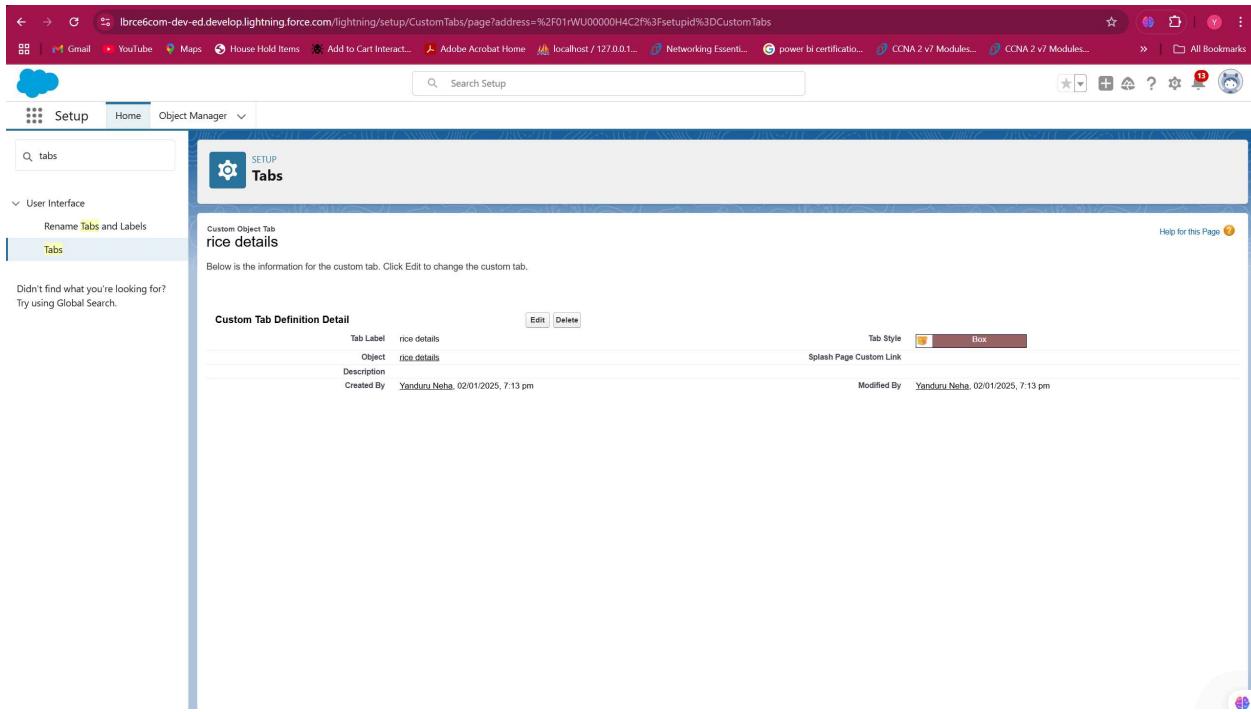
The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. A custom object tab named 'rice mills' has been created under the 'rice mill' object. The tab is styled with a 'Box' tab style and a 'Custom Link' splash page. It was created by Yanduru Neha on 02/01/2025 at 7:13 pm.

Custom Tab Definition Detail
Tab Label: rice mills
Object: rice mill
Description:
Created By: Yanduru Neha, 02/01/2025, 7:13 pm
Tab Style: Box
Splash Page Custom Link
Modified By: Yanduru Neha, 02/01/2025, 7:13 pm



The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. A custom object tab named 'consumers' has been created under the 'consumer' object. The tab is styled with a 'Box' tab style and a 'Custom Link' splash page. It was created by Yanduru Neha on 02/01/2025 at 7:13 pm.

Custom Tab Definition Detail
Tab Label: consumers
Object: consumer
Description:
Created By: Yanduru Neha, 02/01/2025, 7:13 pm
Tab Style: Box
Splash Page Custom Link
Modified By: Yanduru Neha, 02/01/2025, 7:13 pm



Milestone 4 - The Lightning App

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

Activity 1: Create a LightningApp

To create a Lightning app page, follow these steps:

Navigate to App Manager:

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

Fill in App Details:

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

App Options Page:

- Keep the settings as default.
- Click Next.

Utility Items Page:

- Keep the settings as default.
- Click Next.

Upload a Photo:

- Upload a photo that is related to your app.

Add Navigation Items:

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

Add User Profiles:

- Search for profiles (System Administrator) in the searchbar.

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

Screenshot of the Lightning Experience App Manager page:

The URL is <https://lbrce6com-dev-ed.lightning.force.com/lightning/setup/NavigationMenus/home>

The page title is "Lightning Experience App Manager".

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

The main table lists 23 items, sorted by App Name, filtered by All appmenuments - TabSet Type, App Type.

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

Screenshot of the Lightning App Builder page:

The URL is <https://lbrce6com-dev-ed.lightning.force.com/visualEditor/appBuilder.app?id=02uWU0000008539eYAC&r?url=https%3A%2F%2Flbrce6com-dev-ed.lightning.force.com%2Flightning%2Fsetup%2FNavigationMenus%2Fhome>

The page title is "App Settings".

The tab bar shows "App Settings" selected.

The main section is "App Details & Branding".

Form fields include:

- App Options
- Utility Items (Desktop Only)
- Navigation Items
- User Profiles
- *App Name: MY RICE
- *Developer Name: MY_RICE
- Description: Enter a description...
- Image: A small logo icon.
- Primary Color Hex Value: #0070D2
- Org Theme Options: A checkbox is unchecked.

The "App Launcher Preview" section shows a preview of the app icon and name.

Milestone 5: Fields

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

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields

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

- a. Created By
- b. Owner
- c. Last Modified
- d. Field Made During Object Creation

Custom Fields

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to their requirements. Each organization or company can use them if necessary. It means you do not always need to include them in the records, unlike Standard Fields. Hence, the final decision depends on the user, who can add or remove Custom Fields as needed.

Activity 1: Creating the Number Field in Rice Details Object

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

Navigate to Object Manager:

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

Edit the Rice Details Object:

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

Create a New Field:

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

Select Data Type:

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

Define Field Properties:

- Enter the Field Label as Rice Distributed.
- Set the length to 5.

The screenshot shows the Salesforce Object Manager interface. On the left, a sidebar lists various setup options under 'Fields & Relationships'. The main content area is titled 'rice details Custom Field rice distributed' and shows the 'Custom Field Definition Detail' page. Key details visible include:

- Field Information:** Field Label: rice distributed, Field Name: rice_distributed, API Name: rice_distributed_c.
- General Options:** Required (unchecked), Unique (unchecked), External ID (unchecked), AI Prediction (unchecked).
- Number Options:** Length: 5, Decimal Places: 0.
- Validation Rules:** A section stating 'No validation rules defined.'

Activity 2: Creating Junction Object

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

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

To create a Junction Object:

Navigate to Object Manager:

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

Create a New Field:

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

Select Data Type:

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

Relate to Supplier Object:

- Select the relatedobject Supplier.
- Click Next.

Define Field Properties:

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

Repeat Steps for Rice Mill Object:

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

Define Field Properties for Rice Mill:

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

lbrc6com-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0IWU000002Cb3/FieldsAndRelationships/0ONWU0000077c69/view

Setup Home Object Manager Search Setup

SETUP > OBJECT MANAGER
rice details

Details Fields & Relationships

Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules Object Access Triggers Flow Triggers Validation Rules

rice details Custom Field supplier Back to rice details Help for this Page

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

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

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

Lookup Filter No lookup filters defined.

Validation Rules New Validation Rules Help

No validation rules defined.

Always show me ▾ more records per related list

Back To Top

lbrc6com-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0IWU000002Cb3/FieldsAndRelationships/0ONWU0000077c69/view

Setup Home Object Manager Search Setup

SETUP > OBJECT MANAGER
rice details

Details Fields & Relationships

Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules Object Access Triggers Flow Triggers Validation Rules

rice details Custom Field rice mill 1(one) Back to rice details Help for this Page

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

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

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

Lookup Filter No lookup filters defined.

Validation Rules New Validation Rules Help

No validation rules defined.

Always show me ▾ more records per related list

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Activity 3: Creating a Master-Detail Relationship

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

Creating Master-Detail Relationship between Consumer & Rice Mill Object

To create a Master-Detail relationship:

Navigate to Object Manager:

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

Create a New Field:

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

Select Data Type:

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

Related to Rice Mill Object:

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

Define Field Properties:

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

Activity 4: Creating the Roll-up Summary

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

Creating the Roll-up Summary Field on Supplier & Rice Mill Objects

To create a Master-Detail relationship:

Navigate to Object Manager:

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

Create a New Field:

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

Select Data Type:

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

Define Field Properties for Supplier:

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

Configure Roll-upSummary for Supplier:

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

The screenshot shows the Salesforce Object Manager interface. A custom field named 'sum of rice distributed' is being created for the 'supplier' object. The field is of type Number and is aggregated using the SUM function. It is labeled 'sum of rice distributed' and has the API name 'sum_of_rice_distributed__c'. The field is associated with the 'rice_details' object.

Repeat Steps for Rice Mill Object:

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

Configure Roll-upSummary for Rice Mill:

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

Additional Steps for Consumer Object

Create the Field:

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

Repeat Steps for Rice Mill Object:

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

Configure Roll-upSummary for Rice Mill (Consumer):

- Select the summarized object as Consumer.
- Select the roll-up type as SUM.

- Select the field to aggregate as Rice Taken in Shops.
- Click Next .
- Click Next again.
- Click Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Home, Object Manager, and a search bar. The main title is 'rice mill'. On the left, a sidebar lists various setup options under 'FIELDS & RELATIONSHIPS'. The central content area displays the 'Custom Field Definition Detail' for the 'rice taken' field. Key details shown include:

- Field Information:**
 - Field Label: rice taken
 - Field Name: rice_taken
 - API Name: rice_taken_c
 - Description: (empty)
 - Help Text: (empty)
 - Data Owner: (empty)
 - Field Usage: (empty)
 - Data Sensitivity Level: (empty)
 - Compliance Categorization: (empty)
- Created By:** Yanduru Neha, 02/01/2025, 7:39 pm
- Modified By:** Yanduru Neha, 02/01/2025, 7:39 pm
- Roll-Up Summary Options:**

Data Type	Roll-Up Summary	Summary Type
Summarized Object	consumer	SUM
Field to Aggregate	consumer.rice_taken_by_shops_in_kgs	
Filter Criteria	(empty)	

Activity 5: Creating Fields in Objects

Creating the number fieldin the Rice Details object.

Navigate to Setup:

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

Edit Rice Details Object:

- In Object Manager,find and select "Rice Details" from thelist of objects.

- Click on "Fields & Relationships."

Create New Field:

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

Select Data Type:

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

Define Field Properties:

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

Proceed with Creation:

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

The screenshot shows the Salesforce Object Manager interface. On the left, a sidebar lists various setup options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, among others. The main content area is titled 'rice details Custom Field supplier' and shows the 'Custom Field Definition Detail' page. The 'Field Information' section includes fields for Field Label ('supplier'), Field Name ('supplier'), API Name ('supplier__c'), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'Master-Detail Options' section shows it is a Master-Detail type field related to 'rice details'. The 'Validation Rules' section indicates 'No validation rules defined.' The top right of the page has links for 'Help for this Page' and 'Validation Rules Help'.

Activity 6: Creating Fields in Rice Mill Objects

Navigate to Setup:

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

Edit Rice Mills Object:

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

Create New Field:

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

Select Data Type:

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

The screenshot shows the Salesforce Object Manager interface. A custom field named 'rice price/kg' is being created for the 'rice mill' object. The field is defined as a Number type with a length of 5. The page includes a sidebar with various setup options like Page Layouts, Lightning Record Pages, and Field Sets.

Activity 7: Creating Fields in Consumer Objects

Navigate to Setup:

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

Edit Consumer Object:

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

Create New Field For First Name:

consumer Custom Field
First name

Custom Field Definition Detail

Field Information

- Field Label: First name
- Field Name: First_name
- API Name: First_name_c
- Description: Help Text
- Data Owner: Field Usage
- Data Sensitivity Level: Compliance Categorization
- Created By: Yanduru Neha, 02/01/2025, 7:49 pm
- Modified By: Yanduru Neha, 02/01/2025, 7:49 pm

General Options

- Required:
- Unique:
- Case Sensitive:
- External ID:
- Default Value:

Text Options

- Length: 30

Validation Rules

No validation rules defined.

Create New Field For Last Name:

consumer Custom Field
Last name

Custom Field Definition Detail

Field Information

- Field Label: Last name
- Field Name: Last_name
- API Name: Last_name_c
- Description: Help Text
- Data Owner: Field Usage
- Data Sensitivity Level: Compliance Categorization
- Created By: Yanduru Neha, 02/01/2025, 7:50 pm
- Modified By: Yanduru Neha, 02/01/2025, 7:50 pm

General Options

- Required:
- Unique:
- Case Sensitive:
- External ID:
- Default Value:

Text Options

- Length: 50

Validation Rules

No validation rules defined.

Create New Field For Email:

consumer Custom Field
email

Custom Field Definition Detail

Field Label	email	Object Name	consumer
Field Name	email	Data Type	Email
API Name	email_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Yanduru Neha, 02/01/2025, 7:51 pm	Modified By	Yanduru Neha, 02/01/2025, 7:51 pm

General Options

- Required
- Unique
- External ID
- Default Value

Validation Rules

No validation rules defined.

Create New Field For Rice Taken By Shops:

consumer Custom Field
Rice taken by shops

Custom Field Definition Detail

Field Label	Rice taken by shops	Object Name	consumer
Field Name	Rice_taken_by_shops	Data Type	Number
API Name	Rice_taken_by_shops_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Yanduru Neha, 02/01/2025, 7:52 pm	Modified By	Yanduru Neha, 02/01/2025, 7:59 pm

General Options

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

Number Options

Length	5
Decimal Places	0

Validation Rules

No validation rules defined.

Create New Field For Rice Type:

Rice type

Custom Field Definition Detail

Field Information

- Field Label: Rice type
- Field Name: Rice_type
- API Name: Rice_type_c
- Description:
- Help Text:
- Data Owner:
- Field Usage:
- Data Sensitivity Level:
- Compliance Categorization:

Created By: Yanduru Neha, 02/01/2025, 7:53 pm Modified By: Yanduru Neha, 02/01/2025, 7:53 pm

General Options

- Required:
- Default Value:

Picklist Options

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

Picklist Values Used

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

Field Dependencies

- No dependencies defined.

Create New Field For Phone Number:

Phone number

Custom Field Definition Detail

Field Information

- Field Label: Phone number
- Field Name: Phone_number
- API Name: Phone_number_c
- Description:
- Help Text:
- Data Owner:
- Field Usage:
- Data Sensitivity Level:
- Compliance Categorization:

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

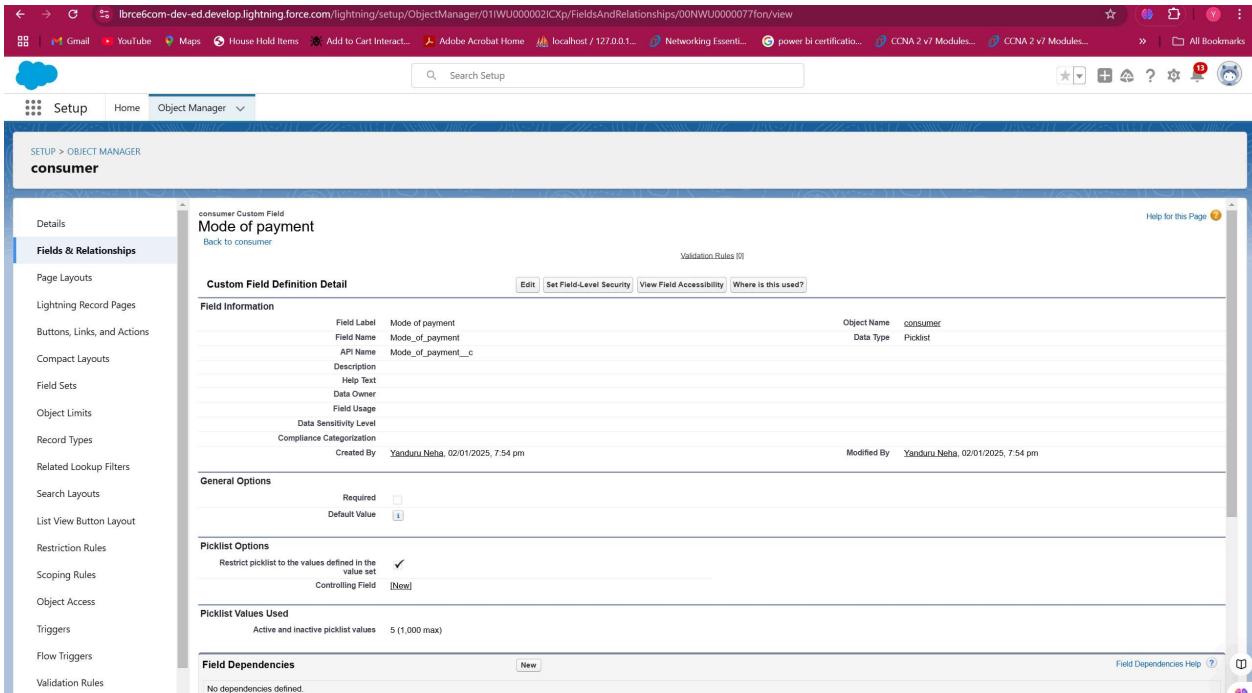
General Options

- Required:
- Default Value:

Validation Rules

- No validation rules defined.

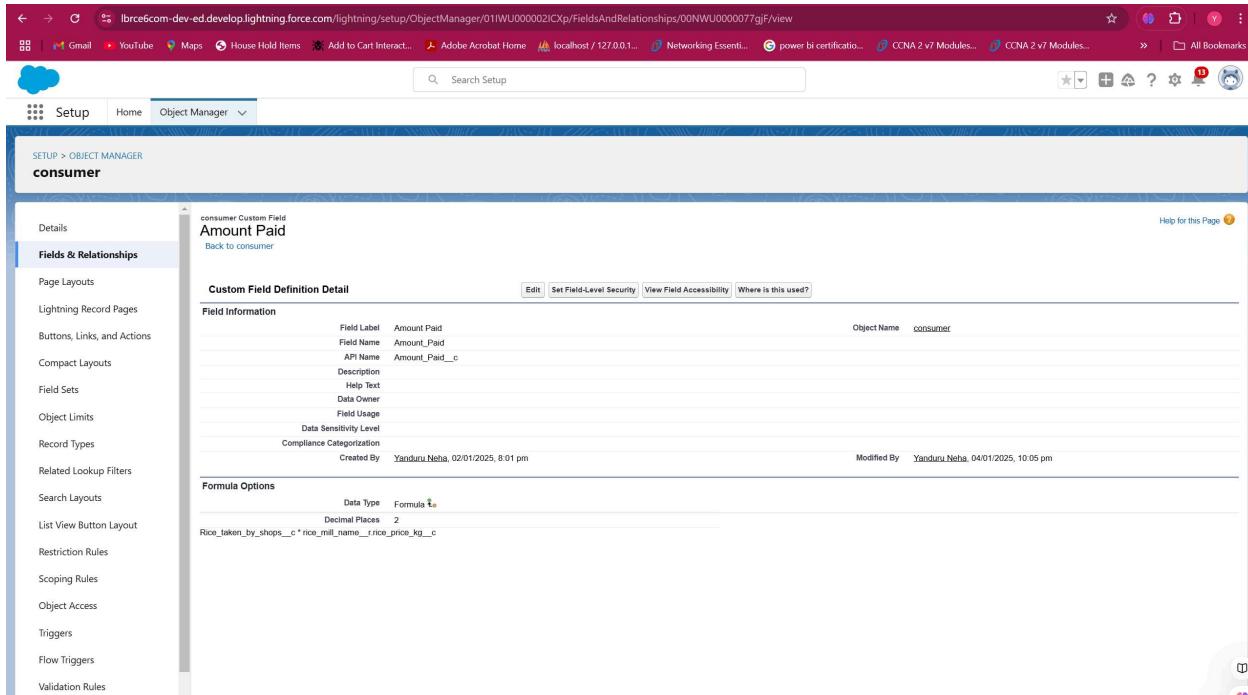
Create New Field For Mode Of Payment:



Activity 8: Creating Cross Object Formula Field in Consumer Object

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

- Goto setup → click on Object Manager→ type object name (consumer) in the searchbar Click on Fields & Relationships → click on New.
- Select Data type as “Formula” and click Next.
- Give Field Label and Field Name as“Amount Paid” and select formulareturn type as “Number” Formula: rice_taken_by_shops_c * rice_mill_name_r.rice_price_kg_c



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

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'SETUP > OBJECT MANAGER' and lists various setup categories like Page Layouts, Lightning Record Pages, Buttons, etc. The main content area is titled 'consumer Custom Field Consumer Name' and shows the 'Custom Field Definition Detail' for the 'Consumer Name' field. The field information includes: Field Label: Consumer Name, Field Name: Consumer_Name, API Name: Consumer_Name_c, Description: Help Text, Data Owner: Field Usage, Data Sensitivity Level: Compliance Categorization, Created By: Yanduru.Neha, 02/01/2025, 8:02 pm, Modified By: Yanduru.Neha, 04/01/2025, 10:06 pm. The formula options show a formula: First_name__c + ' ' + Last_name__c.

Activity 9: Creating the Validation Rule

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

Creating the ValidationRule for Phone Number Field in Consumer Object

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

- Under the Error Message, Write “Please fill in your Phone Number”.
- Save Validation rule .

The screenshot shows the Salesforce Setup interface for the 'consumer' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the 'Validation Rule Detail' for the 'consumer' object. The validation rule is named 'Phonenumberoremailblankrule'. The error condition formula is 'OR(ISBLANK(Phone_number__c) , ISBLANK(email__c))'. The error message is 'please fill in your phone number'. The description is 'phone number and email number should not be blank'. The rule is active and was created by Yanduru Neha on 02/01/2025 at 8:04 pm, modified by Yanduru Neha on 04/01/2025 at 10:07 pm.

Overall SupplierFields

The screenshot shows the Salesforce Setup interface for the 'supplier' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the 'Fields & Relationships' section for the 'supplier' object. It shows a table with 5 items, sorted by Field Label. The table columns include FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes: Created By (CreatedById, Lookup(User)), Last Modified By (LastModifiedById, Lookup(User)), Owner (OwnerId, Lookup(User,Group)), sum of rice distributed (sum_of_rice_distributed_c, Roll-Up Summary (SUM rice details)), and supplier Name (Name, Text(80)).

Overall Rice Mill Fields

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

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

Overall Rice Details Fields

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

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
rice details Name	Name	Auto Number		✓
rice distributed	rice_distributed_c	Number(5, 0)		
rice mill 1(one)	rice_mill_1_one_c	Master-Detail(rice mill)		✓
supplier	supplier_c	Master-Detail(supplier)		✓

Overall Consumer Fields

Fields & Relationships					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Fields & Relationships	Amount Paid	Amount_Paid__c	Formula (Number)		
Page Layouts	Consumer Name	Consumer_Name__c	Formula (Text)		
Lightning Record Pages	consumer Name	Name	Auto Number		✓
Buttons, Links, and Actions	Created By	CreatedById	Lookup(User)		
Compact Layouts	email	email__c	Email		
Field Sets	First name	First_name__c	Text(30)		
Object Limits	Last Modified By	LastModifiedById	Lookup(User)		
Record Types	Last name	Last_name__c	Text(50)		
Related Lookup Filters	Mode of payment	Mode_of_payment__c	Picklist		
Search Layouts	Phone number	Phone_number__c	Phone		
List View Button Layout	rice mill name	rice_mill_name__c	Master-Detail(rice mill)		✓
Restriction Rules	Rice taken by shops	Rice_taken_by_shops__c	Number(5, 0)		
Scoping Rules	rice taken by shops in kgs	rice_taken_by_shops_in_kgs__c	Number(18, 0)		
Object Access	Rice type	Rice_type__c	Picklist		
Triggers					
Flow Triggers					
Validation Rules					
URL Slugs					

Milestone 6: Page Layouts

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

Activity 1: Creating the Page Layout

- Go to Setup → Click on Object Manager → Search for the object(consumer) → From the dropdown select the object and click on it.
- Click on Page Layout → Click on New.
- Select the existing page layout, and give the page layout name as “consumer layout”, and click Save.
- Drag and drop the section field to ConsumerDetails and create the section.
- Enter the section name as “Personal Details”, → click Ok.
- Now drag the fields to this section that are mentioned: First Name , Last Name , ConsumerName , etc.
- Follow the same process for another two sections as shown above. They are:

- Section: "Rice Details" Fields: Rice Taken by Shop, Rice Type
- Section: "Receipt Details" Fields: Mode of Payment, Amount Paid

- Click Save.

The screenshot shows the Salesforce Object Manager interface for the 'consumer' object. The left sidebar lists various configuration options under 'Page Layouts'. The main area displays the 'consumer Layout' configuration. It includes a 'Fields' section with a table showing field names and descriptions, and an 'Actions' section with a table showing action names and descriptions. Below these are panels for 'consumer Sample' (highlighting), 'Quick Actions in the Salesforce Classic Publisher', and 'Salesforce Mobile and Lightning Experience Actions'. At the bottom, there are tabs for 'rice details' and 'Personal details' with specific field values shown.

Milestone 7: Profiles

A profile is a group/collection of settings and permissions that define what a user can do in Salesforce. Profiles control object permissions, field permissions, user permissions, tab settings, app settings, Apex class access, Visualforce page access, page layouts, recordtypes, login hours, and login IP ranges. You can define profiles by the user's job function. For example, System Administrator, Developer, Sales Representative.

Types of Profiles in Salesforce

1. Standard Profiles

By default, Salesforce provides the following standard profiles:

- Contract Manager

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

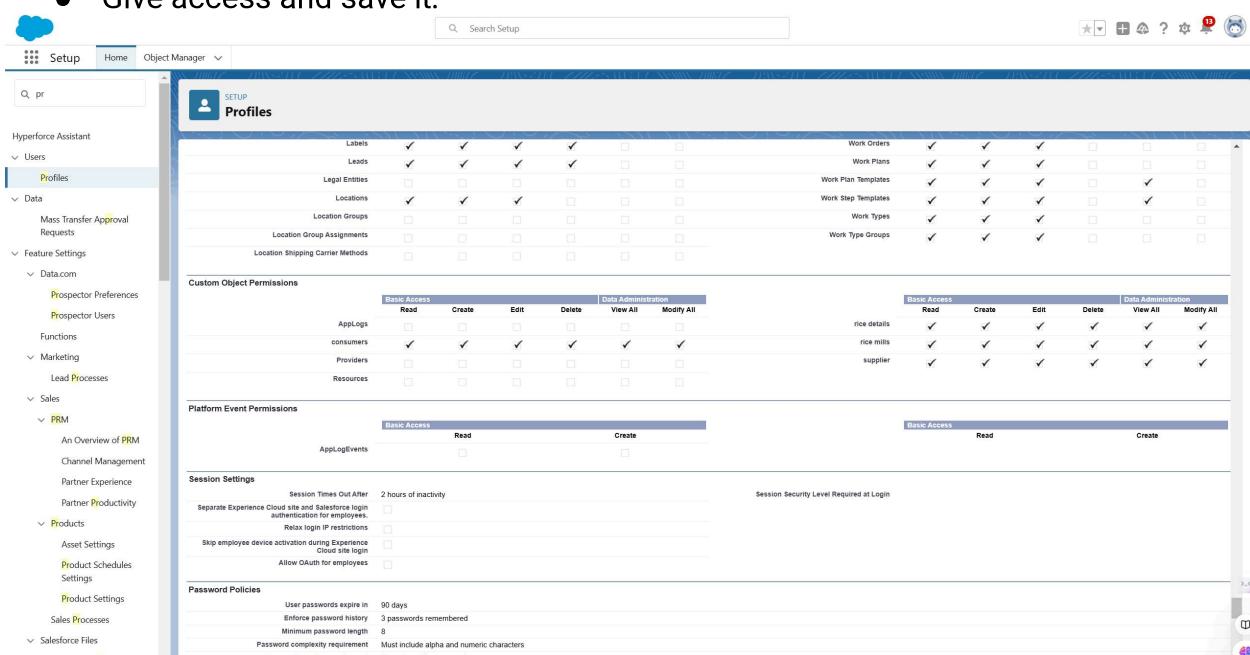
2. Custom Profiles

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

Activity 1: Owner Profile

To create a new profile:

- Go to Setup → type "Profiles" in the quick find box → click on Profiles → clone the desired profile (Standard User) → enter profile name (Owner) → Save.
 - Scroll down to CustomObject Permissions and give accesspermissions for consumers, rice details, rice mill, and suppliers objects as mentioned in the below diagram.
 - Give access and save it.



Activity 2: Employer Profile

To create a new profile:

- Go to Setup → type "Profiles" in the quick find box → click on Profiles → clone the desired profile (Standard Platform User) → enter profile name (Employer) → Save.
- While still on the profile page, click Edit.
- Select the Custom App settings as default for the rice mill.
- Scroll down to CustomObject Permissions and give accesspermissions for consumer, rice details, rice mill, and suppliers objects as mentioned in the below diagram. Click Save.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar shows various categories like Users, Data, and PRM. The main content area displays the 'Profiles' setup page with sections for Contact Point Addresses, Contact Point Consents, Contact Point Emails, Sellers, Streaming Channels, and User External Credentials. Below this is a 'Custom Object Permissions' section for AppLogs, consumers, Providers, and Resources, with specific permissions for Read, Create, Edit, Delete, View All, and Modify All. Further down are sections for Platform Event Permissions (AppLogEvents), Session Settings (Session Times Out After, Separate Experience Cloud site and Salesforce login, Relax login IP restrictions, Skip employee device activation during login, Allow OAuth for employees), and Password Policies (User password expiration, Enforce password history, Minimum password length, Password complexity requirement, Password question requirement, Maximum invalid login attempts, Lockout effective period, Obscure secret answer for password resets, Require a minimum 1 day password lifetime). The URL in the browser bar is lbre6com-dev.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eWU00000081d0n.

Activity 3: Workers Profile

To create a new profile:

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

consumer, rice details, rice mill, and suppliers objects as mentioned in the below diagram. Click Save.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. On the left, a sidebar lists various categories like Users, Data, Feature Settings, etc. The main content area shows a profile named 'worker'. It includes sections for Profile Detail (Name: worker, User License: Salesforce Platform, Created By: Yanduru Neha, Modified By: Yanduru Neha), Page Layouts (Standard Object Layouts, Alternative Payment Method, etc.), and a list of permissions at the top.

Milestone 8: Role & Role Hierarchy

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

Activity 1: Creating Owner Role

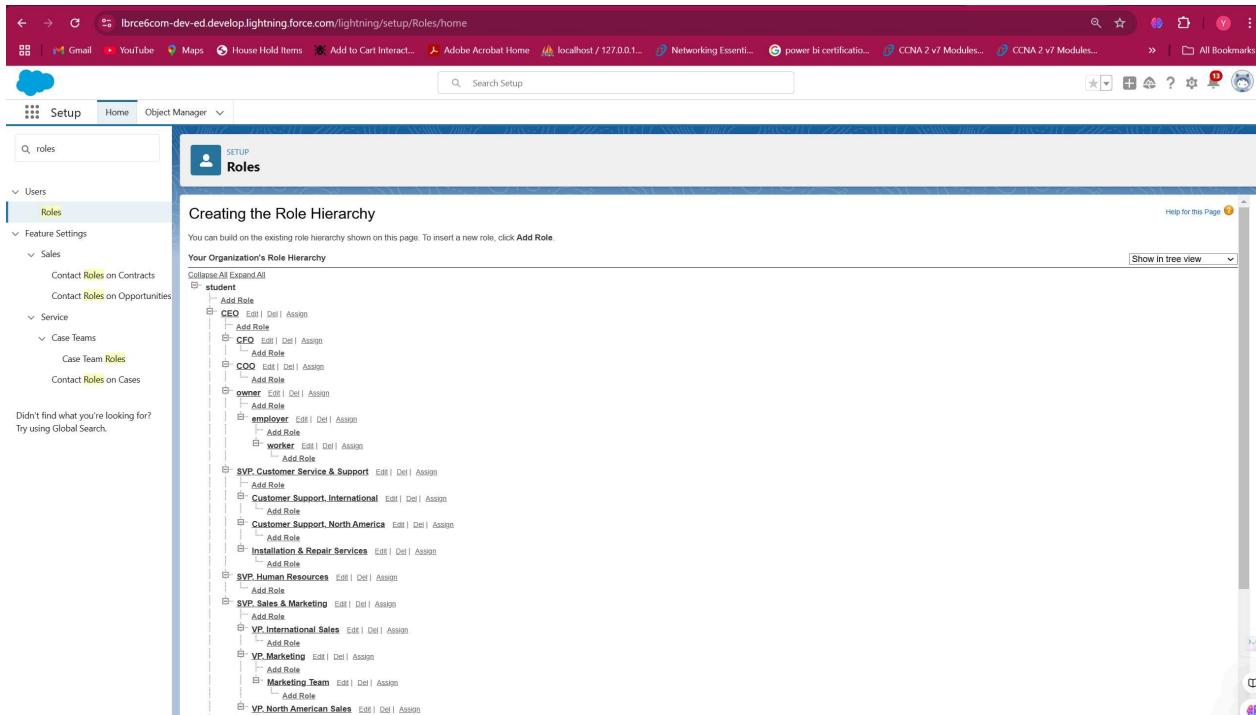
Creating Owner Role:

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

Activity 2: Creating Employer Roles

Creating Another Two Roles Under Manager:

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



Milestone 9: Users

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

Activity 1: Create User

- Go to Setup → type "Users" in the quick find box → select Users → click New User.
- Fill in the fields:
 - First Name: Vicky
 - Last Name: Y
 - Alias: Vy
 - Email ID: nehayanduru12@gmail.com
 - Username: nehayanduru12@gmail.com
 - Nickname: Vicky
 - Role: Owner
 - User License: Salesforce
 - Profile: Owner
 - Save it.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A new user record is being created with the following details:

User Detail	Value	Role
Name	vicky y	owner
Alias	vy	Salesforce
Email	nehayanduru12@gmail.com	Profile
Username	nehayanduru12@gmail.com	owner
Nickname	User1735915536014372850	Active
Title		Marketing User
Company		Offline User
Department		Knowledge User
Division		Flow User
Address		Service Cloud User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Contributor User
Locale	English (India)	Site.com Publisher User
Language	English	WDC User
Delegated Approver		Mobile Push Registrations
Manager		Data.com User Type
Receive Approval Request Emails	Only if I am an approver	Accessibility Mode (Classic Only)
Federation ID		Debug Mode
App Registration: One-Time Password Authenticator		High-Contrast Palette on Charts
App Registration: Salesforce Authenticator		Load Lightning Pages While Scrolling
Security Key (U2F or WebAuthn)		Salesforce CRM Content User
Lightning Login		Receive Salesforce CRM Content Alerts as Daily Digest
Temporary Verification Code (Expires in 1 to 24 Hours)	[Generate]	Receive Salesforce CRM Content Alerts as Email Digest
		Make Setup My Default Landing Page
		Allow Forecasting
		No MRO Updates
		Call Center
		Phone
		Extension
		Fax
		Mobile

Activity 2: Creating Another Users

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

- Alias: rram
- Email ID: nehayanduru12@gmail.com
- Username: nehayanduru@gmail.com
- Nickname: ram
- Role: Employer
- User License: Salesforce Platform
- Profile: StandardPlatform User
- Save it.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, a sidebar lists categories like Permission Set Groups, Profiles, Public Groups, Roles, and User Management Settings. The main area is titled 'User Detail' for a user named 'ram ram'. It shows the following details:

- User Detail:**
 - Name: ram ram
 - Alias: rram
 - Email: nehayanduru12@gmail.com [Verify]
 - Username: nehayanduru@gmail.com
 - Nickname: User17359136933802951811
 - Title:
 - Company:
 - Department:
 - Division:
 - Address:
 - Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
 - Locale: English (India)
 - Language: English
 - Delegated Approver: Manager
 - Receive Approval Request Emails: Only if I am an approver
 - Federation ID:
 - App Registration: One-Time Password Authenticator, Salesforce Authenticator, Security Key (2FA or WebAuthn), Lightning Login, Temporary Verification Code (Expires in 1 to 24 Hours) [Generate]
- Role:** employer
- User License:** Salesforce Platform
- Profile:** StandardPlatform User
- Active:** checked
- Marketing:** checked
- Service Cloud User:** checked
- Mobile Push Registrations:** checked
- Data.com User Type:** Data.com User
- Accessibility Mode (Classic Only):** checked
- Debug Mode:** checked
- High-Contrast Palettes on Charts:** checked
- Load Lightning Pages While Scrolling:** checked
- Salesforce CRM Content User:** checked
- Receive Salesforce CRM Content Email Alerts:** checked
- Receive Salesforce CRM Content Alerts as Daily Digest:** checked
- Make Setup My Default Landing Page:** checked
- Allow Forecasting:** checked
- No MRU Updates:** checked
- Call Center:** checked
- Phone:** checked
- Extension:** checked
- Fax:** checked
- Mobile:** checked

- Go to Setup → type "Users" in the quick find box → select Users → click New User.
- Fill in the fields:
 - First Name: ragu
 - Last Name: raj
 - Alias: rraj
 - Email ID: nehayanduru12@gmail.com
 - Username: nehayanduru123@gmail.com

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

User
ragu raju

Alias raju
Email nehayanduru12@gmail.com [Verify] [\[Edit\]](#)
Username nehayanduru123@gmail.com
Nickname User1735913819260432785 [\[Edit\]](#)

User License
Profile Standard Platform User
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Mobile Push Registrations [View](#)
Data.com User Type [Edit](#)
Accessibility Mode (Classic Only)
Debug Mode
High-Contrast Palette on Change
Load Lightning Pages While Scrolling
Salesforce CRM Content User
Receive Salesforce CRM Content Email Alerts
Receive Salesforce CRM Content Alerts as Daily Digest
Make Setup My Default Landing Page
Allow Forecasting
No MRU Updates
Call Center
Phone
Extension
Fax
Mobile

Public Group Membership

No records to display

Delegated Approver Manager

Manager Manager Mode (Classic Only)
Receive Approval Request Email Only if I am an approver
Federation ID Federation ID [Edit](#)
App Registration: One-Time Password Authenticator [Edit](#)
App Registration: Salesforce Authenticator [Edit](#)
Security Key (2FA or WebAuthn) [Edit](#)
Lightning Login [Edit](#)
Temporary Verification Code (Expires in 1 to 24 Hours) [Generate](#) [Edit](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Exact	Chatter	chatty_00daw00000eckwv2ar.dou9mp0@chatter.salesforce.com	SF Admin	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Greg_Jane	greg	jane_grajyaynmoan.khsyjohna@ibrc6.com	worker	<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/>	Neha_Yanduru	YNeha	nehayanduru12@gmail.com	employee	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	ram	ram	nehayanduru123@gmail.com	owner	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	ram	ram	nehayanduru@gmail.com	owner	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	User_Integration	integ	integration@00daw00000eckwv2ar.com	owner	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	scc	insightssecurity@00daw00000eckwv2ar.com	owner	<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>	y.xddy	xy	nehayanduru12@gmail.com	owner	<input checked="" type="checkbox"/>	owner

Milestone 10: Permission Sets

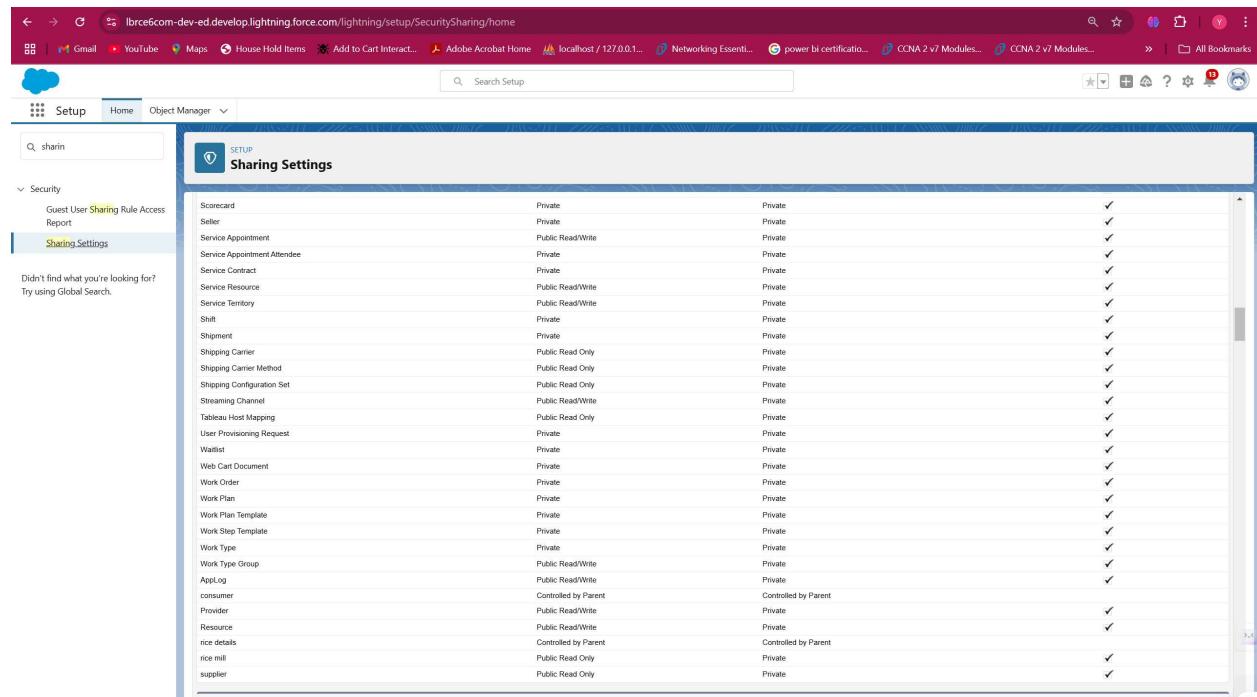
A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles and are the recommended way to manage your users' permissions.

Activity 1: Creating OWD Setting

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

Extra Information:

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



The screenshot shows the Salesforce Sharing Settings page. The URL is lbre6com-dev-ed.lightning.force.com/lightning/setup/SecuritySharing/home. The page title is "Sharing Settings". On the left, there's a sidebar with "Setup" selected under "Security". The main area lists various objects with their sharing rules. Most objects have "Private" as the default internal access, except for "Seller", "Service Appointment", "Service Appointment Attendee", "Service Contract", "Service Resource", "Service Territory", "Shift", "Shipment", "Shipping Carrier", "Shipping Carrier Method", "Shipping Configuration Set", "Streaming Channel", "Tableau Host Mapping", "User Provisioning Request", "Walllist", "Web Cart Document", "Work Order", "Work Plan", "Work Plan Template", "Work Step Template", "Work Type", "Work Type Group", "Applog", "consumer", "Provider", "Resource", "rice details", "rice mill", and "supplier", which have "Public Read-Only". A legend at the bottom right indicates that a checkmark means "Controlled by Parent".

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

Milestone 11: Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics. Salesforce.com provides a powerful suite of analytic tools to help you organize, view, and analyze your data.

Activity 1: Create Report

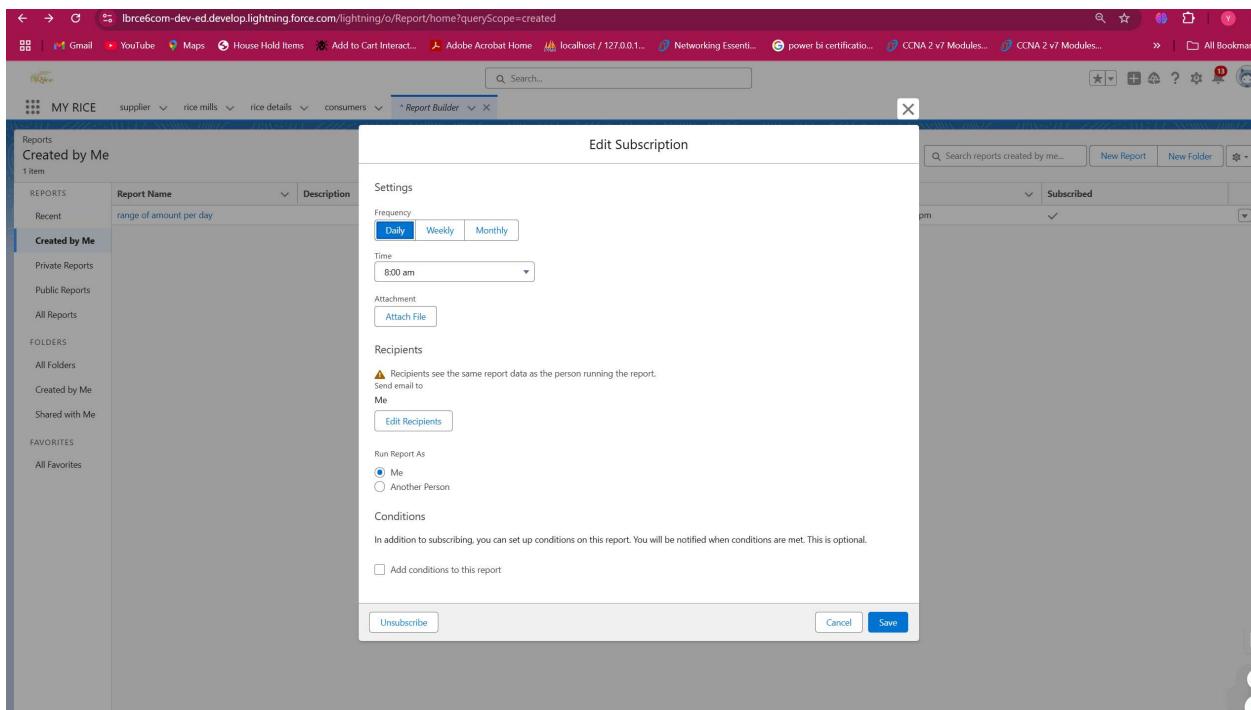
- Go to the app → click on the Reports tab.
- Click New Report.
- Select for Report Type, search for “Rice Mill with Consumers”, click on it, and click Start Report.
- The outline pane is opened already, select the fields that are mentioned below in the Column section:
 - Consumer Name
 - Rice Type
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

The screenshot shows a web browser window with the URL lrbce6com-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=created. The page displays a report titled "range of amount per day" under the folder "estimated rice per day". The report was created by Yanduru Neha on 3/1/2025 at 8:28 pm. The browser's address bar and various toolbars are visible at the top.

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

Activity 2: Sharing Report to Owner

- Click on the report to open it.
- Click the Edit dropdown menu and select the Subscribe option.
- After selecting to run the report as "Another Person," select your personal account or the person you want to send the email to.
- Click Save.
- Note: The owner gets a daily email notification of the Rice Mill reports so that they can see all data remotely.



Activity 3: Create a Report Folder

Steps to Create a Report Folder:

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

Moving a Report to the New Folder:

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

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

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

Overall Reports (Range of amount per day)

Report: rice mills with consumers
range of amount per day

Total Records	Total rice price/kg	Total Amount Paid
10	670	69,300.00

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

Milestone 12: Dashboards

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

Activity 1: Create DashboardFolder

Steps to Create a Dashboard Folder:

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

The screenshot shows a browser window for the Salesforce Lightning interface at the URL lbre6com-dev-ed.lightning.force.com/lightning/o/Dashboard/home?queryScope=userFoldersCreatedByMe. The page title is "Dashboards Created by Me". The left sidebar has a "Created by Me" section selected, showing "1 item". The main content area displays a table with one row of data:

Name	Created By	Created On	Last Modified By	Last Modified Date
amount data dashboard	Yanduru Neha	3/1/2025, 8:33 pm	Yanduru Neha	3/1/2025, 8:33 pm

At the top of the page, there is a search bar with the placeholder "Search...". To the right of the search bar are buttons for "New Dashboard" and "New Folder".

Activity 2: Create Dashboard

- Go to the App → click on the Dashboards tab.

- Give a Name and select the folder that was created, and click Create.
- Select Add Component.
- Select a Report and click Select.

First ComponentDetails:

- Display as: Vertical Bar Chart
- X-axis: Rice Taken by Shops
- Y-axis: Sum of Amount
- Y-axis Range: Automatic
- Sort by: Rice Taken by Shops
- Component Theme: Dark

SecondComponent Details:

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

