

**A CRM APPLICATION FOR WHOLESALE**

**RICE MILL**

**By**

**Ankur Baijal**

**ankur.baijal11@gmail.com**

## **Project Abstract**

The "CRM Application for Wholesale Rice Mill" is a specialised customer relationship management system designed to streamline and enhance the operational efficiency of rice mills. This application focuses on the unique needs of wholesale rice distributors, providing a platform to manage customer interactions, sales processes, and inventory control effectively. The system integrates features like customer data management, order tracking, billing, and real-time inventory updates, enabling wholesalers to respond promptly to market demands and customer inquiries. The application also includes analytical tools for forecasting sales trends, optimizing supply chains, and improving customer satisfaction. By automating routine tasks and providing actionable insights, the CRM application aims to boost productivity, reduce operational costs, and foster stronger relationships with customers.

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# INTRODUCTION

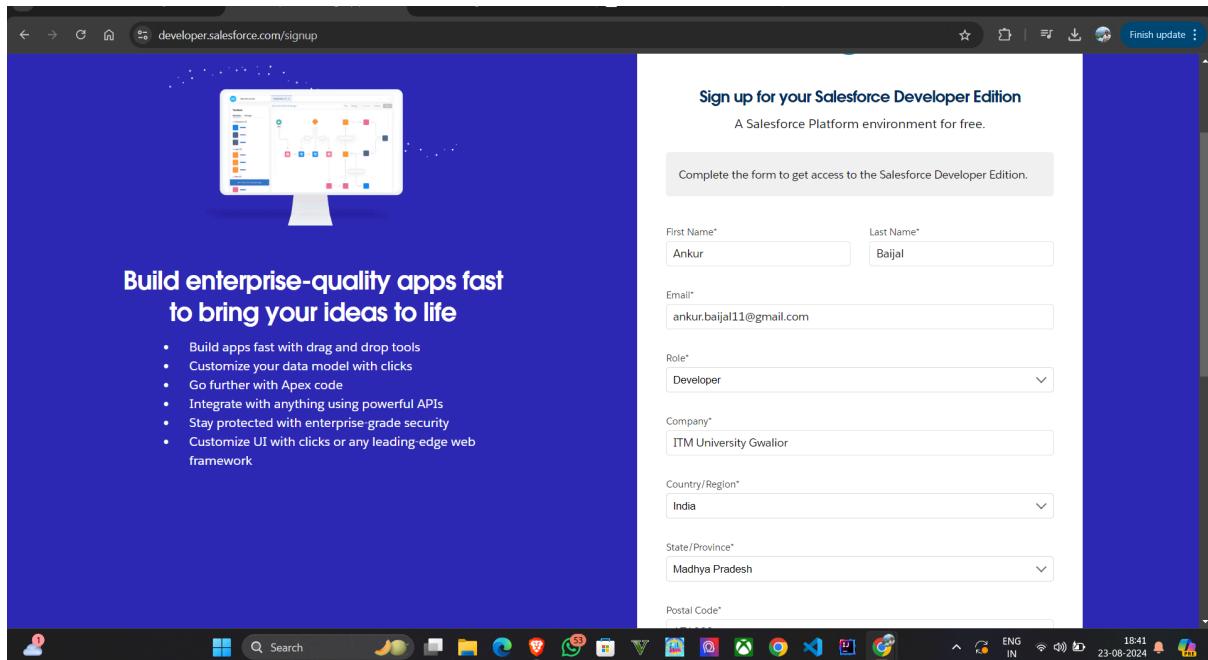
The Rice Mill CRM Application is a comprehensive solution designed to streamline and simplify how much rice per day, how many were sold that rice and which type of rice all reports send to owners daily wise. It leverages the power of customer relationship management (CRM) to enhance customer experiences,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

## Features and Functionality:

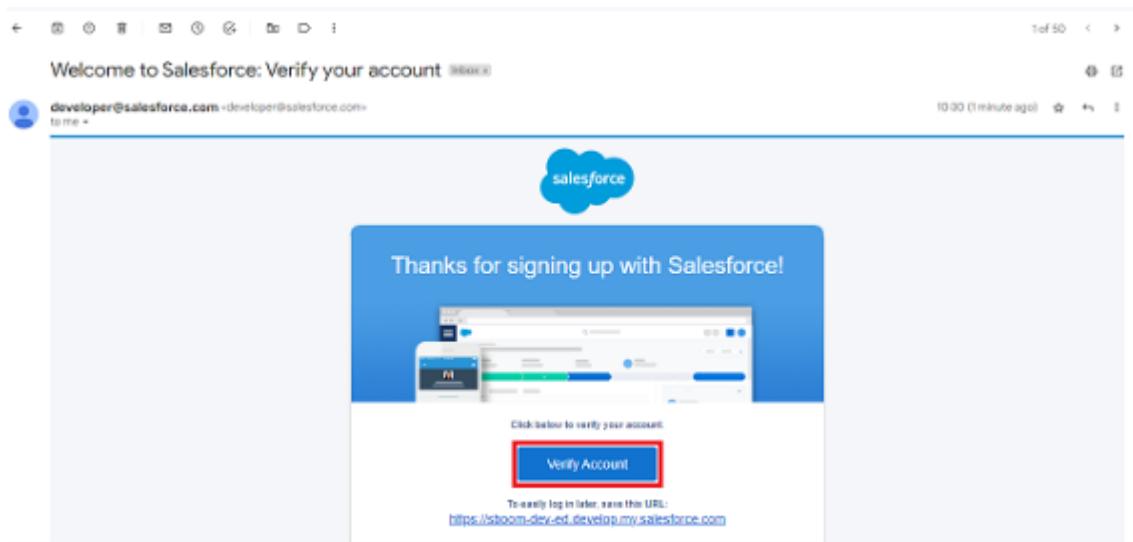
- **Reporting and Dashboards:** The application can generate detailed reports and analytics regarding daily how much rice sold and total income per daily, revenue generated, popular amenities, and most buyed customers. Easy to understand the data to the owner, improving resource allocation, and planning future development.
- **A rollup summary field:** This is a field that summarizes data from a child object to a parent object that shares a master-detail relationship. Rollup summary fields can use the COUNT, SUM, MIN, and MAX functions. For example, you could use a rollup summary field to display the total value (amount of rice supplied ) from rice details on a related supplier.
- **A cross-object formula field:** It is a formula field that references fields from another object in Salesforce. This type of formula allows users to calculate the total amount from number of rice taken\*price/kg and it displays the total amount I have to pay.
- **Validation rules:** validation rules also include an error message to display to the user when the rule returns a value of “True” due to an invalid value.so , In this project i gave Isblank formula.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.

# Task 1: Creating Account

1. Creating a developer org in salesforce.



2. Activate your account by clicking on the verify account that is sent to your mail.



# Task 2: Creating Objects

## 1.Create Supplier object

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

Edit Custom Object  
**supplier**

**Custom Object Definition Edit**

**Custom Object Information**

The singular and plural labels are used in tabs, page layouts, and reports.  
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label	<input type="text" value="supplier"/>	Example: Account
Plural Label	<input type="text" value="suppliers"/>	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	<input type="text" value="supplier"/>	Example: Account
-------------	---------------------------------------	------------------

Description

Context-Sensitive Help Setting

<input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window
<input type="radio"/> Open a window using a Visualforce page

Content Name

<input type="button" value="None"/>
-------------------------------------

Record Name  Example: Account Name

Data Type

**Optional Features**

Allow Reports  
 Allow Activities  
 Track Field History  
 Allow in Chatter Groups  
 Enable Licensing (i)

**Object Classification**

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light.

Allow Sharing  
 Allow Bulk API Access  
 Allow Streaming API Access

**Deployment Status**

In Development  
 Deployed

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search

## 2.Create rice mill object.

- From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

  - Enter the label name >> rice mill
  - Plural label name >> rice mills
  - Enter Record Name Label and Format
    - Record Name >>
    - Data Type >> Auto Number
    - Display Format >> rice-{000}
    - Starting number >> 1

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

Edit Custom Object  
rice mill

**Custom Object Definition Edit**

**Custom Object Information**

The singular and plural labels are used in tabs, page layouts, and reports.  
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label	<input type="text" value="rice mill"/>	Example: Account
Plural Label	<input type="text" value="rice mills"/>	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	<input type="text" value="rice_mill"/>	Example: Account
-------------	--	------------------

Description

Context-Sensitive Help Setting

<input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window
<input type="radio"/> Open a window using a Visualforce page

Content Name

—None—

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for C

called "Name" when referenced via the API

Record Name	<input type="text" value="rice mill Name"/>	Example: Account Name
Data Type	<input type="text" value="Auto Number"/>	Warning: If you plan to insert a high volume of records in this object, via the API for example, us
Display Format	<input type="text" value="rice-{000}"/>	Example: A-{0000} <a href="#">What Is This?</a>

**Optional Features**

Allow Reports  
 Allow Activities  
 Track Field History  
 Allow in Chatter Groups  
 Enable Licensing 

**Object Classification**

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light A

Allow Sharing  
 Allow Bulk API Access  
 Allow Streaming API Access

**Deployment Status**

In Development  
 Deployed

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

Allow Search

- Create consumer object.
- Use these display format for the consumer
  - label name >> consumer

- Plural label name >> consumers
- Display Format >> consumers-{000}
- Starting number >> 1

Edit Custom Object  
consumer

**Custom Object Definition Edit**

**Custom Object Information**

The singular and plural labels are used in tabs, page layouts, and reports.  
**Be careful when changing the name or label as it may affect existing integrations and merge templates.**

Label	<input type="text" value="consumer"/>	Example: Account
Plural Label	<input type="text" value="consumers"/>	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	<input type="text" value="consumer"/>	Example: Account
-------------	---------------------------------------	------------------

Description

Context-Sensitive Help Setting

<input checked="" type="radio"/>	Open the standard Salesforce.com Help & Training window
<input type="radio"/>	Open a window using a Visualforce page

Content Name

**Enter Record Name Label and Format**

called "Name" when referenced via the API.

Record Name	<input type="text" value="consumer Name"/>	Example: Account Name
Data Type	<input type="button" value="Auto Number"/>	Warning: If you plan to insert a high volume of records in this object
Display Format	<input type="text" value="consumers-{000}"/>	Example: A-{0000} <a href="#">What Is This?</a>

**Optional Features**

Allow Reports  
 Allow Activities  
 Track Field History  
 Allow in Chatter Groups  
 Enable Licensing 

**Object Classification**

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Standard object.

Allow Sharing  
 Allow Bulk API Access  
 Allow Streaming API Access

**Deployment Status**

In Development  
 Deployed

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

Allow Search

#### 4.Create rice details object.

1. Use these display format for the rice details
  - label name >> rice details
  - Plural label name >> rice details
  - Display Format >> rice-{000}
  - Starting Number >>1

Edit Custom Object

## rice details

**Custom Object Definition Edit**

### Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.  
**Be careful when changing the name or label as it may affect existing integrations and merge templates.**

Label	<input type="text" value="rice details"/>	Example: Account
Plural Label	<input type="text" value="rice details"/>	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	<input type="text" value="rice_details"/>	Example: Account
-------------	---	------------------

Description:

Context-Sensitive Help Setting

<input checked="" type="radio"/>	Open the standard Salesforce.com Help & Training window
<input type="radio"/>	Open a window using a Visualforce page

Content Name

### Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case is "Case Name".

called "Name" when referenced via the API.

Record Name	<input type="text" value="rice details Name"/>	Example: Account Name
Data Type	<input type="button" value="Auto Number"/>	<b>Warning:</b> If you plan to insert a high volume of records in this object, consider using a different data type.
Display Format	<input type="text" value="rice-{000}"/>	Example: A-{0000} <a href="#">What Is This?</a>

### Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing [i](#)

### Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Standard object.

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

### Deployment Status

- In Development
- Deployed

### Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

- Allow Search

# Task 3: Creating Tabs

Create a custom tab for supplier object.

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object( supplier) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.

The screenshot shows the 'Custom Tab Definition Edit' page for the 'suppliers' object. At the top, there's a header with a gear icon and the word 'SETUP'. Below it, the title 'Edit Custom Object Tab suppliers' is displayed. A sub-header says 'Fill in the fields below to define the custom tab.' The main section is titled 'Custom Object Tab Information'. It shows the 'Tab Label' as 'suppliers', 'Object' as 'supplier', and 'Tab Style' set to 'Helicopter'. There's a note about choosing a 'Splash Page Custom Link' with a dropdown menu showing '-None-'. Below this, there's a 'Description' field with a large text area and a 'Save' button at the bottom right.

The screenshot shows the 'Custom Tab Definition Detail' page for the 'supplier' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A sidebar on the left has a search bar with 'Q, tabs' and a 'User Interface' section with 'Rename Tabs and Labels' and 'Tabs' selected. The main content area shows a title 'Custom Object Tab supplier' with a 'Help for this Page' link. Below it, a message says 'Below is the information for the custom tab. Click Edit to change the custom tab.' A 'Custom Tab Definition Detail' table is shown with columns for 'Tab Label' (supplier), 'Object' (supplier), 'Description' (empty), 'Created By' (Ankur Bajaj, 23/08/2024, 4:41 pm), 'Tab Style' (Box), and 'Modified By' (Ankur Bajaj, 23/08/2024, 4:41 pm). There are 'Edit' and 'Delete' buttons at the top of the table.

Create a custom tab for rice mill object.

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object( rice mill) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.

**SETUP**

## Tabs

Edit Custom Object Tab  
**rice mills**

Fill in the fields below to define the custom tab.

**Custom Tab Definition Edit**

**Custom Object Tab Information**

Tab Label	rice mills
Object	<a href="#">rice mill</a>
Tab Style	Gears

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

Enter a short description.

Description	<input type="text"/>
-------------	----------------------

**Save** **Cancel**

**SETUP**

## Tabs

Custom Object Tab  
**rice details**

Below is the information for the custom tab. Click Edit to change the custom tab.

**Custom Tab Definition Detail**

Tab Label	rice details	<a href="#">Edit</a>	<a href="#">Delete</a>	Tab Style	Chess piece
Object	<a href="#">rice_details</a>			Splash Page Custom Link	
Description				Created By	Ankur Bajaj, 23/08/2024, 4:42 pm
				Modified By	Ankur Bajaj, 23/08/2024, 4:42 pm

### Create a custom tab for consumer object.

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(consumer) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.

**SETUP**

**Tabs**

Edit Custom Object Tab  
**consumers**

Fill in the fields below to define the custom tab.

**Custom Tab Definition Edit**

**Custom Object Tab Information**

Tab Label	consumers
Object	<u>consumer</u>
Tab Style	Building

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.  
Splash Page Custom Link

Enter a short description.

Description	
-------------	--

**SETUP**

**Tabs**

Custom Object Tab  
**consumers**

Below is the information for the custom tab. Click Edit to change the custom tab.

**Custom Tab Definition Detail**

Tab Label	consumers	Tab Style	Boat
Object	<u>consumer</u>	Splash Page Custom Link	
Description			
Created By	Ankur Bajaj, 23/08/2024, 4:42 pm	Modified By	Ankur Bajaj, 23/08/2024, 4:42 pm

Create a custom tab for rice details object.

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(rice details) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.

 **SETUP**  
**Tabs**

Edit Custom Object Tab  
**rice details**

Fill in the fields below to define the custom tab.

**Custom Tab Definition Edit**

**Custom Object Tab Information**

Tab Label	rice details
Object	rice_details
Tab Style	 Radar dish 

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link 

Enter a short description.

Description

 **SETUP**  
**Tabs**

Custom Object Tab  
**rice details**

Below is the information for the custom tab. Click Edit to change the custom tab.

**Custom Tab Definition Detail**

Tab Label	rice details	 
Object	rice_details	Splash Page Custom Link
Description		
Created By	Ankur Bajaj, 23/08/2024, 4:42 pm	Modified By  Ankur Bajaj, 23/08/2024, 4:42 pm



# Task 4: Creating 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.

The screenshot shows the Salesforce Lightning Experience App Manager. The left sidebar has a tree view with "Salesforce Mobile App" expanded, showing "Data", "Apps" (selected), "Connected Apps", "External Client Apps", "Lightning Bolt", and "Mobile Apps". Under "Apps", "App Manager" is selected. The main area is titled "Lightning Experience App Manager" and shows a table of 32 items. The columns are "App Name", "Developer Name", "Description", "Last Modified", "App Type", and "View". The table lists various built-in and third-party apps like All Tabs, Analytics Studio, App Launcher, Automation, Bolt Solutions, Chatter Desktop, Chatter Mobile, Community, Content, Data Manager, Digital Experiences, Dreamhouse, and Lightning Usage App.

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

## App Details & Branding

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

### App Details

\* App Name

\* Developer Name

Description

### App Branding

Image

Primary Color Hex Value

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

### App Launcher Preview



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

4. To add Navigation Item:

### Navigation Items

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

The screenshot shows a configuration interface for navigation items. On the left, under 'Available Items', there is a search bar labeled 'Type to filter list...' and a list of items: Accounts, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations, Approval Requests, and Asset Action Sources. On the right, under 'Selected Items', there is a list of items: suppliers, rice mills, consumers, and rice details. Between the two lists are four buttons: a 'Create' button with a dropdown arrow, a right-pointing arrow, a left-pointing arrow, and a vertical scroll bar.

5. Select the items (supplier, rice mill, consumer)

6. To Add User Profiles:

### User Profiles

Choose the user profiles that can access this app.

#### Available Profiles

The screenshot shows a configuration interface for user profiles. On the left, under 'Available Profiles', there is a search bar labeled 'Type to filter list...' and a list of profiles: Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, B2B Reordering Portal Buyer Profile, Cleaner, Contract Manager, and Cross Org Data Proxy User. On the right, under 'Selected Profiles', there is a list containing 'System Administrator'. Between the two lists are four buttons: a 'Create' button with a dropdown arrow, a right-pointing arrow, a left-pointing arrow, and a vertical scroll bar.

#### Selected Profiles

System Administrator

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

# Task 5: Creating Fields

## Creating the number field in rice details object

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

The screenshot shows the Salesforce Object Manager with the 'rice details' object selected. On the left, there's a sidebar with various layout options like Page Layouts, Lightning Record Pages, etc. The main area is titled 'Fields & Relationships' and lists six items. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The 'rice distributed' field is highlighted, showing it's of type Number(5, 0).

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 Name	supplier_Name_c	Master-Detail(supplier)		✓

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

This screenshot shows the 'Custom Field Definition Edit' screen for the 'rice distributed' field. It's a modal window with tabs for 'Field Information' and 'General Options'. In 'Field Information', the Field Label is set to 'rice distributed' and the Field Name is 'rice\_distributed'. The Data Type is set to 'Number'. In 'General Options', the 'Required' checkbox is checked, and there's a note: 'Always require a value in this field in order to save a record'.

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

## 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.
4. Select the related object “ supplier ” and click next.
5. Give Field Label as “supplier Name” and click Next.
6. Next >> Next >> Save & New.

Edit rice details Custom Field  
supplier Name

Have feedback on loc

**Custom Field Definition Edit**

**Field Information**

Field Label	supplier Name	Data Type	Master-Detail
Field Name	Supplier_Name		
Description			
Help Text			
Data Owner	User		
Field Usage	--None--		
Data Sensitivity Level	--None--		
Compliance Categorization	<b>Available</b> PII HIPAA GDPR PCI	<b>Chosen</b>	

**Master-Detail Options**

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.

Edit rice details Custom Field  
rice mill 1(one)

Have feedback on lookup filters

**Custom Field Definition Edit**

**Field Information**

Field Label	rice mill 1(one)	Data Type	Master-Detail
Field Name	rice_mill_1_one		
Description			
Help Text			
Data Owner	User		
Field Usage	--None--		
Data Sensitivity Level	--None--		
Compliance Categorization	<b>Available</b> PII HIPAA GDPR PCI	<b>Chosen</b>	

## 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.

Edit consumer Custom Field  
rice mill name Have feedback on look

**Custom Field Definition Edit** Save Cancel

**Field Information**

Field Label	<input type="text" value="rice mill name"/>	Data Type	Master-Detail
Field Name	<input type="text" value="rice_mill_name"/>		
Description	<input type="text"/>		
Help Text	<input type="text"/>		
Data Owner	User	<input type="text"/>	
Field Usage	--None--	<input type="text"/>	
Data Sensitivity Level	--None--	<input type="text"/>	
Compliance Categorization	<div style="display: flex; align-items: center;"> <div style="flex: 1;"> <b>Available</b>            PII            HIPAA            GDPR            PCI         </div> <div style="margin: 0 10px;"> <input type="button" value="&lt;"/>  <input type="button" value="&gt;"/> </div> <div style="flex: 1;"> <b>Chosen</b> </div> </div>		

### 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 generated, and click Next.

Edit supplier Custom Field  
**sum of rice distributed**

**Custom Field Definition Edit** Save Cancel

**Field Information**

Field Label	<input type="text" value="sum of rice distributed"/>
Field Name	<input type="text" value="sum_of_rice_distributed"/>

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.

**Roll-Up Summary Options**

Data Type Calculation Options	Roll-Up Summary <input checked="" type="radio"/> Automatic calculation (Recommended) <input type="radio"/> Force a mass recalculation of this field
----------------------------------	---

**Select Object to Summarize**

Master Object	supplier
Summarized Object	rice details

**Select Roll-Up Type**

<input type="radio"/> COUNT <input checked="" type="radio"/> SUM <input type="radio"/> MIN <input type="radio"/> MAX	Field to Aggregate <input type="button" value="rice distributed"/>
---	--

**Filter Criteria**

<input checked="" type="radio"/> All records should be included in the calculation <input type="radio"/> Only records meeting certain criteria 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.

Edit supplier Custom Field  
**rice distributed to shops**

**Custom Field Definition Edit**

**Field Information**

Field Label	<b>rice distributed to shops</b>
Field Name	<b>rice_distributed_to_shops</b>

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.

**Roll-Up Summary Options**

Data Type Calculation Options	Roll-Up Summary <input checked="" type="radio"/> Automatic calculation (Recommended) <input type="radio"/> Force a mass recalculation of this field
----------------------------------	---

**Select Object to Summarize**

Master Object	supplier
Summarized Object	rice details

**Select Roll-Up Type**

<input type="radio"/> COUNT <input checked="" type="radio"/> SUM <input type="radio"/> MIN <input type="radio"/> MAX	Field to Aggregate <input type="button" value="rice distributed"/>
---	--

**Filter Criteria**

<input checked="" type="radio"/> All records should be included in the calculation <input type="radio"/> Only records meeting certain criteria should be included in the calculation
---

13. create the field as “ rice taken by shops in kgs ” using number datatype in consumer object.

Edit consumer Custom Field  
rice taken by shops in kgs

**Custom Field Definition Edit** Change Field Type | Save | Cancel

**Field Information**

Field Label	rice taken by shops in kgs	Data Type	Number
Field Name	rice_taken_by_shops_in_Kg		
Description			
Help Text			
Data Owner	User		
Field Usage	--None--		
Data Sensitivity Level	--None--		
Compliance Categorization	<b>Available</b> <span style="border: 1px solid #ccc; padding: 2px;">PII</span> <span style="border: 1px solid #ccc; padding: 2px;">HIPAA</span> <span style="border: 1px solid #ccc; padding: 2px;">GDPR</span> <span style="border: 1px solid #ccc; padding: 2px;">PCI</span> <b>Chosen</b>		

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.

Edit rice mill Custom Field  
rice taken

**Custom Field Definition Edit** Save | Cancel

**Field Information**

Field Label	rice taken	
Field Name	rice_taken	
Description		
Help Text		

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.

**Roll-Up Summary Options**

Data Type	Roll-Up Summary
Calculation Options	<input checked="" type="radio"/> Automatic calculation (Recommended) <input type="radio"/> Force a mass recalculation of this field

**Select Object to Summarize**

Master Object	rice mill
Summarized Object	consumers

**Select Roll-Up Type**

<input type="radio"/> COUNT <input checked="" type="radio"/> SUM <input type="radio"/> MIN <input type="radio"/> MAX	Field to Aggregate <span style="border: 1px solid #ccc; padding: 2px;">Rice taken by shops</span>
---	---

**Filter Criteria**

<input checked="" type="radio"/> All records should be included in the calculation <input type="radio"/> Only records meeting certain criteria should be included in the calculation
---

## 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 “master detail” and click Next.
4. Given the Field Label as “ supplier name ” and length as “ 5
5. Field Name will be auto populated, and click on Next>> Next >> Save.

## 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 ”

The screenshot shows the Salesforce Object Manager interface for the 'rice mill' object. On the left, there's a sidebar with various settings like Details, Page Layouts, Lightning Record Pages, etc. The main area is titled 'Fields & Relationships'. Under this, there's a list of field types with descriptions:

- 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 source of the values in the list.
  - 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.
- 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.
  - When a user deletes the master record, all detail records are deleted.
  - You can create rollup summary fields on the master record to summarize the detail records.
- External Lookup Relationship: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- Checkbox: Allows users to select a True (checked) or False (unchecked) value.
- Currency: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date: Allows users to enter a date or pick a date from a popup calendar.
- Date/Time: Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the field.
- Email: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking the Email button. Note that custom email addresses cannot be used for mass emails.
- Geolocation: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Number: Allows users to enter any number. Leading zeros are removed.
- Percent: Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

The screenshot shows the 'New Custom Field' configuration page for the 'rice mill' object. It's on 'Step 2. Enter the details'. The form fields are:

- Field Label: rice price/kg
- Length: 5
- Decimal Places: 0
- Field Name: rice\_price\_kg
- Description: (empty)
- Help Text: (empty)
- 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

## Creating Fields in consumer Objects

1. Create a “First name” field, Data Type - “text”.

consumer Custom Field

**First name**

[Back to consumer](#)

[Validation Rules \[0\]](#)

**Custom Field Definition Detail**

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

**Field Information**

Field Label	First name	Object Name	consumer
Field Name	First_name	Data Type	Text
API Name	First_name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By [Ankur Baijal](#), 23/08/2024, 5:30 pm Modified By [Ankur Baijal](#), 23/08/2024, 5:31 pm

## 2. Create a “Last name” field, Data Type - “text”.

consumer Custom Field

**Last name**

[Back to consumer](#)

[Validation Rules \[0\]](#)

**Custom Field Definition Detail**

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

**Field Information**

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

Created By [Ankur Baijal](#), 23/08/2024, 5:32 pm Modified By [Ankur Baijal](#), 23/08/2024, 5:32 pm

## 3. Create a “Phone number” field, Data Type - “phone”.

SETUP > OBJECT MANAGER

**consumer**

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout

consumer Custom Field

**Phone number**

[Back to consumer](#)

[Validation Rules \[0\]](#)

**Custom Field Definition Detail**

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

**Field Information**

Field Label	Phone number	Object Name	consumer
Field Name	Phone_number	Data Type	Phone
API Name	Phone_number__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By [Ankur Baijal](#), 23/08/2024, 5:32 pm Modified By [Ankur Baijal](#), 23/08/2024, 5:32 pm

**General Options**

Required	<input type="checkbox"/>
Default Value	

## 4. Create a “email” field, Data Type - “email”.

The screenshot shows the 'Object Manager' interface for the 'consumer' object. On the left, a sidebar lists various customization options like Page Layouts, Lightning Record Pages, Buttons, etc. The main area displays the 'email' custom field definition. Key details shown include:

- Field Information:** Field Label: email, Field Name: email, API Name: email\_\_c.
- Object Details:** Object Name: consumer, Data Type: Email.
- Timestamps:** Created By: Ankur Bajaj, Created Date: 23/08/2024, 5:33 pm; Modified By: Ankur Bajaj, Modified Date: 23/08/2024, 5:33 pm.

5. Create a “Rice taken by shops” field, Data Type - “Number”,length=5.

The screenshot shows the 'Object Manager' interface for the 'consumer' object. The 'rice taken by shops' custom field is defined. Key details shown include:

- Field Information:** Field Label: rice taken by shops, Field Name: rice\_taken\_by\_shops, API Name: rice\_taken\_by\_shops\_\_c.
- Object Details:** Object Name: consumer, Data Type: Number.
- Timestamps:** Created By: Ankur Bajaj, Created Date: 23/08/2024, 5:06 pm; Modified By: Ankur Bajaj, Modified Date: 23/08/2024, 5:39 pm.

6. Create a “Rice type” field, Data Type - “Picklist”.

Picklist values-

1. Basmati
2. Normal rice

The screenshot shows the 'Object Manager' interface for the 'consumer' object. The 'Rice type' custom field is defined. Key details shown include:

- Field Information:** Field Label: Rice type, Field Name: Rice\_type, API Name: Rice\_type\_\_c.
- Object Details:** Object Name: consumer, Data Type: Picklist.
- Timestamps:** Created By: Ankur Bajaj, Created Date: 23/08/2024, 5:35 pm; Modified By: Ankur Bajaj, Modified Date: 23/08/2024, 5:35 pm.

PICKLIST: Picklist values defined in the value set

Controlling Field: [New]

**Picklist Values Used**  
Active and inactive picklist values: 2 (1,000 max)

**Field Dependencies** [New] Field Dependencies Help [?] No dependencies defined.

**Validation Rules** [New] Validation Rules Help [?] No validation rules defined.

**Values** [New] [Reorder] [Replace] [Printable View] [Chart Colors] Values Help [?] Delete Selected | Deactivate Selected | Replace Selected

Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/>   Edit   Del   Deactivate	1 basmati	1 basmati	<input type="checkbox"/>	Assigned dynamically	Ankur Bajaj 23/08/2024, 5:35 pm
<input type="checkbox"/>   Edit   Del   Deactivate	2 normal rice	2.normal rice	<input type="checkbox"/>	Assigned dynamically	Ankur Bajaj 23/08/2024, 5:35 pm

**Inactive Values** [Delete Unused Values] Inactive Values Help [?] No Inactive Values values defined.

## 7. Create a “Mode of payment” field, Data Type - “Picklist”.

### Picklist values-

- Credit card
- Debit card
- Net banking
- UPI
- Cash

consumer Custom Field

**Mode of payment**

[Back to consumer](#)

Validation Rules [0]

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

**Field Information**

Field Label	Mode of payment	Object Name	consumer
Field Name	Mode_of_payment	Data Type	Picklist
API Name	Mode_of_payment__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Ankur Bajaj 23/08/2024, 5:35 pm	Modified By	Ankur Bajaj 23/08/2024, 5:35 pm

Active and inactive picklist values 5 (1,000 max)

Field Dependencies					
No dependencies defined.					

Validation Rules					
No validation rules defined.					

Values					
Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/>   Edit   Del   Deactivate	Credit card	Credit card	<input type="checkbox"/>	Assigned dynamically	Ankur Bajaj, 23/08/2024, 5:35 pm
<input type="checkbox"/>   Edit   Del   Deactivate	Debit card	Debit card	<input type="checkbox"/>	Assigned dynamically	Ankur Bajaj, 23/08/2024, 5:35 pm
<input type="checkbox"/>   Edit   Del   Deactivate	Net banking	Net banking	<input type="checkbox"/>	Assigned dynamically	Ankur Bajaj, 23/08/2024, 5:35 pm
<input type="checkbox"/>   Edit   Del   Deactivate	UPI	UPI	<input type="checkbox"/>	Assigned dynamically	Ankur Bajaj, 23/08/2024, 5:35 pm
<input type="checkbox"/>   Edit   Del   Deactivate	Cash	Cash	<input type="checkbox"/>	Assigned dynamically	Ankur Bajaj, 23/08/2024, 5:35 pm

Inactive Values					
<input type="button" value="Delete Unused Values"/>					
No Inactive Values values defined.					

## Creating Cross Object Formula Field in consumer Object

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

Edit consumer Custom Field  
Amount Paid

Custom Field Definition Edit											
<input type="button" value="Save"/> <input type="button" value="Quick Save"/> <input type="button" value="Cancel"/>											
Field Information											
Field Label	<input type="text" value="Amount Paid"/>										
Field Name	<input type="text" value="Amount_Paid"/>										
Description	<input type="text"/>										
Help Text	<input type="text"/>										
Data Owner	User <input type="button" value=""/>										
Field Usage	<input type="button" value="None--"/>										
Data Sensitivity Level	<input type="button" value="None--"/>										
Compliance Categorization	<table border="1"> <tr> <td>Available</td> <td>Chosen</td> </tr> <tr> <td>PII</td> <td></td> </tr> <tr> <td>HIPAA</td> <td></td> </tr> <tr> <td>GDPR</td> <td></td> </tr> <tr> <td>PCI</td> <td></td> </tr> </table>	Available	Chosen	PII		HIPAA		GDPR		PCI	
Available	Chosen										
PII											
HIPAA											
GDPR											
PCI											
Formula Options											

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

Simple Formula Advanced Formula

Insert Field Insert Operator Functions

-- All Function Categories --

Amount Paid (Number) =

```
Rice_taken_by_shops_c * rice_mill_name_r.rice_price_kg_c
```

ABS ACOS ADDMONTHS AND ASCII ASIN

Insert Selected Function

Check Syntax

1. Creating the Formula field 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.

Simple Formula Advanced Formula

Insert Field Insert Operator Functions

-- All Function Categories --

amount paid (Number) =

```
rice_taken_by_shops_c * rice_mill_name_r.rice_price_kg_c
```

ABS ACOS ADDMONTHS AND ASCII ASIN

Insert Selected Function

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

## Creating the validation rule

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

- Click on the validation rule >> click New.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Phonenumberoremailblankrule	Top of Page	please fill in your phone number.	✓	Ishika Goyal, 26/07/2024, 8:11 pm

- Enter the Rule name as "Phonenumberoremailblankrule".
- Enter the description as "phone number and email number should not be blank".
- Enter the formula as "OR( ISBLANK( phone\_number\_\_c ), ISBLANK( email\_\_c ) )" and check the syntax.

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

**Validation Rule Edit**

Rule Name: **Phonenumberoremailblankrule**

Active:

Description: phone number and email number should not be blank

Error Condition Formula:

```
Example: Discount_Percent__c>0.30 | More Examples..
```

Display an error if Discount is more than 30%

If this formula expression is true, display the text defined in the Error Message area

Insert Field | Insert Operator | OR( ISBLANK( Phone\_number\_\_c ), ISBLANK( email\_\_c ) )

Functions

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

Help on this function

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

Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

**Insert Field** **Insert Operator ▾**

`OR( ISBLANK( Phone_number_c ), ISBLANK( email_c ) )`

Functions

-- All Function Categories -- ▾

ABS  
ACOS  
ADDMONTHS  
AND  
ASCII  
ASIN

**Insert Selected Function**

ABS(number)  
Returns the absolute value of a number, a number without its sign

[Help on this function](#)

[Check Syntax](#) No errors found

**Error Message**

Example: Discount percent cannot exceed 30%

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

Error Message `please fill in your 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 [i](#)

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

The screenshot shows a user interface for creating a validation rule. At the top, there's a formula editor with a dropdown menu showing 'All Function Categories' with options like ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. Below the formula editor is a message editor titled 'Error Message'. It contains an example message 'Discount percent cannot exceed 30%' and a detailed message 'please fill in your phone number.' which is highlighted with a red border. There are also settings for 'Error Location' (radio buttons for 'Top of Page' and 'Field') and a status message 'No errors found'. At the bottom are standard save buttons: 'Save', 'Save & New', and 'Cancel'.

8. Save the validation rule.

# Task 6: Creating a Page Layout

To Create a Page layout:

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

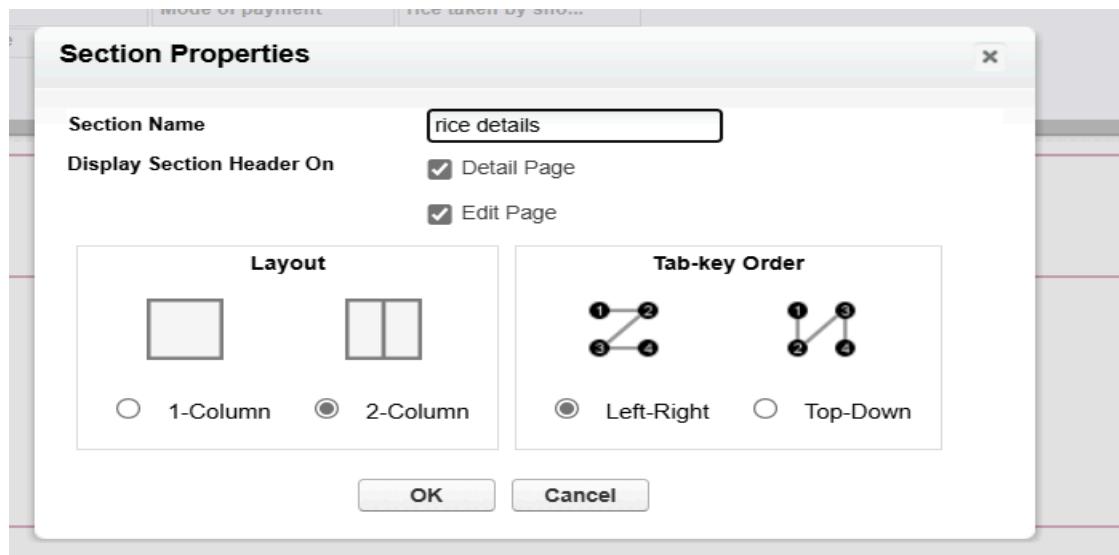
The screenshot shows the 'Page Layouts' section of the 'consumer' object in the Object Manager. The left sidebar lists various layout types: Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main area displays a table titled 'Page Layouts' with one item: 'consumer Layout'. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The 'consumer Layout' was created by 'Ishika Goyal' on 26/07/2024, 7:18 pm, and modified by 'Ishika Goyal' on 07/08/2024, 11:02 am. A 'Quick Find' search bar and 'New' and 'Page Layout' buttons are at the top right.

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.

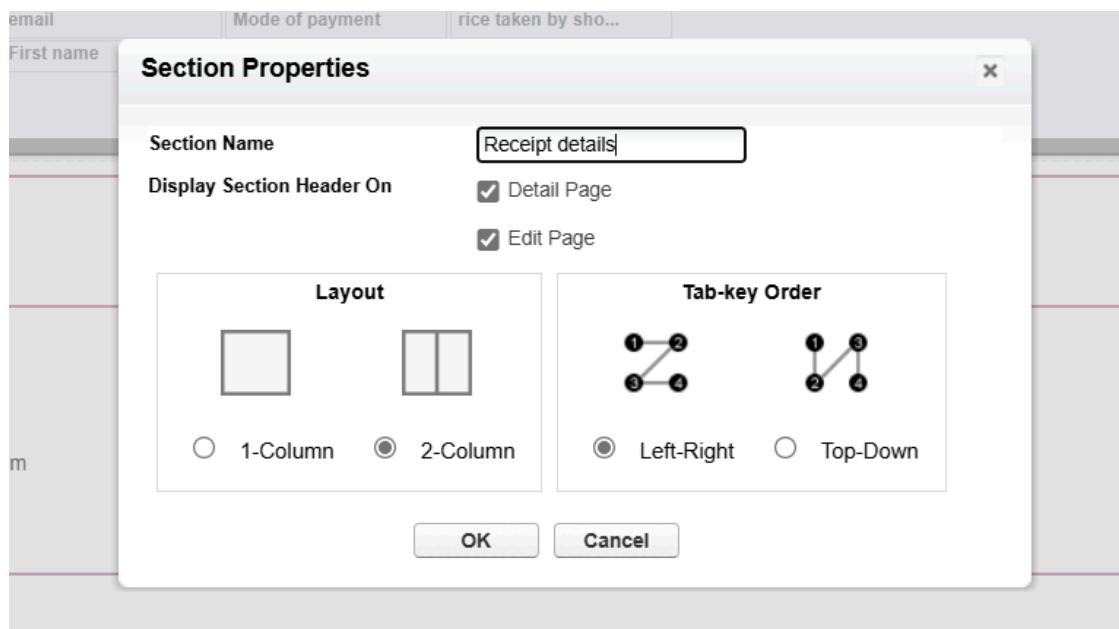
The screenshot shows the 'Section Properties' dialog box. It includes fields for 'Section Name' (set to 'Personal details'), 'Display Section Header On' (checkboxes for 'Detail Page' and 'Edit Page' both checked), 'Layout' options (radio buttons for '1-Column' and '2-Column' with the '2-Column' option selected), and 'Tab-key Order' options (radio buttons for 'Left-Right' and 'Top-Down' with 'Left-Right' selected). At the bottom are 'OK' and 'Cancel' buttons.

7. Now drag the fields to this section that mentioned , they are
  - First name , last name , consumer name , phone number, email, rice mill name.
8. Follow the same process for another two sections as shown above , they are

9. One section is “rice details”, drag the fields that are
- Rice taken by shop, rice type.



10. Another section is “Receipt details”, and drag the fields that are
- Mode of payment , Amount paid.



11. Then , Click save.

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	Consumer Name	Last Modified By	rice mill name
Blank Space	Created By	Last name	Rice taken by shops
Amount Paid	email	Mode of payment	rice taken by sho...
consumer Name	First name	Phone number	Rice type

---

**rice details**

Rice type	Sample Text
Rice taken by shops	97,020

---

**Personal details**

First name	Sample Text
Last name	Sample Text
Consumer Name	Sample Text
email	sarah.sample@company.com
* rice mill name	Sample Text
Phone number	1-415-555-1212

---

**Receipt details**

Amount Paid	422.97
Mode of payment	Sample Text

---

**Information (Header visible on edit only)**

consumer Name	GEN-2004-001234
---------------	-----------------

# Task 7: Creating Profiles

## Owner Profile

To create a new profile:

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

The screenshot shows the 'Profiles' page in the Salesforce Setup. The top navigation bar has 'SETUP' and 'Profiles'. The main content area shows the 'Owner' profile details under 'Profile Overview'. It includes fields for Description (empty), User License (Salesforce), Created By (Ishika\_Goyal, 31/07/2024, 7:25 pm), Assigned Users (checkbox checked), Custom Profile (checkbox checked), and Last Modified By (Ishika\_Goyal, 07/08/2024, 10:47 am). Below this is the 'Apps' section, which lists various app settings like Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, Visualforce Page Access, and External Data Source Access. A note at the bottom says 'Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform' with a 'Learn More' link.

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 'Object permission' page for the 'consumers' object. At the top, it shows 'Tab Settings' with 'Default On'. Below that is the 'Record Types and Page Layout Assignments' section, which shows a single record type assignment: '-Master--' to 'consumer Layout'. In the 'Assigned Record Types' column, there is a checkbox. The 'Object Permissions' section contains a table with columns 'Permission Name' and 'Enabled'. All permissions (Read, Create, Edit, Delete, View All, Modify All) are checked. The 'Field Permissions' section shows a table with columns 'Field Name', 'Field API Name', 'Read Access', and 'Edit Access'. For the 'Amount Paid' field, 'Read Access' is checked and 'Edit Access' is unchecked. For the 'consumer Name' field, both 'Read Access' and 'Edit Access' are checked. For the 'Consumer Name' field, 'Read Access' is checked and 'Edit Access' is unchecked. For the 'Created By' field, both 'Read Access' and 'Edit Access' are unchecked.

3. Give access and save it.

## Employer Profile

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

The screenshot shows the Salesforce Setup Profiles page. At the top, there are two tabs: 'Basic Access' and 'Data Administration'. Below each tab is a matrix table with rows for various objects and columns for permissions (Read, Create, Edit, Delete, View All, Modify All). Checkmarks indicate which permissions are granted for each object.

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

5. And click save.

## Worker Profile

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

The screenshot shows two tables side-by-side under the 'Profiles' setup section. Both tables have columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All). The first table covers entities like Assets, Books, Brokers, Consumers, Employees, Energy audits, Item details, Nick names, Positions, and Projects. The second table covers entities like Purchasers, Reviews, Rice details, Rice mills, SolarBots, SolarBot Status, Studs, Students, Super marts, Suppliers, Teachers, and Tickets. Checkmarks in the tables indicate specific access rights.

	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"/>
stud	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
student	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
super 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"/>
teacher	<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.

# Task 8: Creating Roles

## Creating owner role

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

The screenshot shows the Salesforce Setup Roles page. On the left, there's a sidebar with categories like Users, Feature Settings, Sales, Service, and Case Teams. Under Sales, 'Contact Roles on Contracts' and 'Contact Roles on Opportunities' are highlighted. Under Service, 'Case Team Roles' and 'Contact Roles on Cases' are highlighted. A search bar at the top says 'roles'. The main content area is titled 'Understanding Roles' and contains a 'Sample Role Hierarchy' diagram. The diagram shows a hierarchy from 'Executive Staff' down to 'International Sales Rep'. 'Executive Staff' includes 'CEO', 'President', 'CFO', and 'VP, Sales'. 'Western Sales Director' and 'Eastern Sales Director' report to 'Executive Staff'. 'International Sales Director' also reports to 'Executive Staff'. 'Western Sales Rep' and 'Eastern Sales Rep' report to their respective directors. 'International Sales Rep' reports to 'International Sales Director'. Descriptions next to each role detail their permissions: 'Executive Staff' can view and edit data, roll up forecasts, and generate reports for their level but can't access data of other Executive Staff. 'Western Sales Director' and 'Eastern Sales Director' can view and edit data, roll up forecasts, and generate reports for all users directly below them. 'International Sales Director' can view and edit data, roll up forecasts, and generate reports only for own data. 'Western Sales Rep' and 'Eastern Sales Rep' can view and edit data, roll up forecasts, and generate reports only for own data. 'International Sales Rep' can't access data of users above or at same level. At the bottom right are 'Set Up Roles' and 'Don't show this page again' buttons.

2. Click on Expand All and click on add role under whom this role works.
3. Give Label as “owner” and Role name gets auto populated. Then click on Save.

The screenshot shows the 'Role Edit' page for the 'owner' role. The title bar says 'Role Edit' and 'owner'. The page has sections for 'Label' (set to 'owner'), 'Role Name' (auto-filled as 'owner'), 'This role reports to' (set to 'CEO'), 'Role Name as displayed on reports' (empty), 'Opportunity Access' (radio button options: 'Users in this role cannot access opportunities that they do not own that are associated with accounts that they do own', 'Users in this role can view all opportunities associated with accounts that they own, regardless of who owns the opportunities', 'Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities'), and 'Case Access' (radio button options: 'Users in this role cannot access cases that they do not own that are associated with accounts that they do own', 'Users in this role can view all cases associated with accounts that they own, regardless of who owns the cases', 'Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases'). At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

1. Click and save it.

## Creating employer roles

Creating another two roles under manager

1. Go to quick find >>Search for Roles >>click on set up roles.
2. Click plus on CEO role, and click add role under owner.
3. Give Label as “employer” and Role name gets auto populated. Then click on Save.

The screenshot shows the 'Role Edit' screen for a new role named 'employer'. The 'Label' field contains 'employer'. The 'Role Name' field also contains 'employer'. The 'This role reports to' field has 'owner' selected. Under 'Opportunity Access', the radio button for 'Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities' is selected. Under 'Case Access', the radio button for 'Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases' is selected. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

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.

The screenshot shows the 'Role Edit' screen for a new role named 'worker'. The 'Label' field contains 'worker'. The 'Role Name' field also contains 'worker'. The 'This role reports to' field has 'employer' selected. Under 'Opportunity Access', the radio button for 'Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities' is selected. Under 'Case Access', the radio button for 'Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases' is selected. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

## Task 9: Creating Users

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 Detail' page for a user named 'vicky y'. The page has two main sections: 'User Detail' on the left and 'Profile' on the right. In the 'User Detail' section, fields include Name (vicky y), Alias (vy), Email (ankur.bajaj11@gmail.com), Username (ankur@owner.com), Nickname (vicky), Title, Company, Department, Division, Address, Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata), Locale (English (India)), and Language (English). In the 'Profile' section, roles listed are owner, User License (Salesforce), Profile (owner), Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Mobile Push Registrations (View).

12. Save it.

Similarly, Creating another user –

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

User  
ram ram

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

[Permission Set Assignments](#) [Activation Required](#) [Personal Groups](#) [Public Group Membership](#) [Queue Membership](#)  
[Team](#) [Managers in the Role Hierarchy](#) [OAuth Apps](#) [Third-Party Account Links](#) [Installed Mobile Apps](#) [Authentication Settings for External Systems](#) [Login History](#) [User Provisioning Accounts](#)

**User Detail**

Name	ram ram	Role	employer
Alias	rram	User License	Salesforce Platform
Email	<a href="mailto:ankur.bajaj11@gmail.com">ankur.bajaj11@gmail.com</a> [Verify]	Profile	Standard Platform User
Username	ankur@ram.com	Active	<input checked="" type="checkbox"/>
Nickname	ramm	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>

Again, Creating another user –

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

SETUP  
Users

User  
ragu raj

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[Team](#) [Managers in the Role Hierarchy](#) [OAuth Apps](#) [Third-Party Account Links](#) [Installed Mobile Apps](#) [Authentication Settings for External Systems](#) [Login History](#) [User Provisioning Accounts](#)

**User Detail**

Name	ragu raj	Role	worker
Alias	rraj	User License	Salesforce Platform
Email	<a href="mailto:ankur.bajaj11@gmail.com">ankur.bajaj11@gmail.com</a> [Verify]	Profile	Standard Platform User
Username	ankur@ragu.com	Active	<input checked="" type="checkbox"/>
Nickname	User17244168269438926635	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>

# Task 10: Permission Sets

## Creating OWD setting.

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

The screenshot shows the Salesforce Sharing Settings page. At the top, there's a navigation bar with 'Setup' selected. Below it is a search bar with 'shar'. On the left, a sidebar shows 'Security' with 'Sharing Settings' highlighted. The main content area has a title 'Sharing Settings' and a sub-section 'Default Sharing Settings'. A table titled 'Organization-Wide Defaults' lists various objects and their default internal access levels. The table has three columns: 'Object', 'Default Internal Access', and 'Default External Access'. The 'Default Internal Access' column includes options like 'Public Read/Write/Transfer', 'Private', 'Controlled by Parent', and 'Public Full Access'. The 'Default External Access' column includes 'Private', 'Controlled by Parent', and 'Public'. The 'Grant Access Using Hierarchies' column contains checkmarks. The table lists objects such as Lead, Account and Contract, Contact, Order, Asset, Opportunity, Case, Campaign, Campaign Member, User, and Activity.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Private	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Private	Private	✓
Case	Private	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓

2. Scroll down, change the default internal access to “ public read-only” for rice mill and supplier object.
3. Click save.

# Task 11: Creating Report

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

1. Go to App Launcher >> Consumers >> New.

The screenshot shows the Salesforce consumer list view. At the top, there's a header bar with tabs like Service, Home, Chatter, Accounts, Contacts, Cases, Reports, Dashboards, Favorites, and a Recently Viewed section for consumers. Below the header is a search bar with placeholder text "Search this list..." and various filter and sort icons. The main area displays a table with 10 rows, each representing a consumer record. The columns include a checkbox column, a rank column (1 through 10), and a consumer name column. The consumer names listed are: consumers-001, consumers-008, consumers-010, consumers-009, consumers-007, consumers-006, consumers-005, consumers-004, consumers-003, and consumers-002. Each row has a small edit icon at the end.

2. Fill all the Details.

3. Click Save and New.

## Creating a 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.

The screenshot shows the "Create Report" dialog box. At the top, it says "Create Report". On the left, there's a sidebar titled "Category" with a list of options: Recently Used, All (which is selected and highlighted in blue), Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, Price Books, Products and Assets, and Administrative Reports. To the right of the sidebar, there's a search bar with the placeholder text "Select a Report Type" and a dropdown menu showing results for "rice mills with consumers". Below the search bar, there's a table with two columns: "Report Type Name" and "Category". The entry in the table is "rice mills with consumers" under Category "Standard".

4. 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

5. Remove the unnecessary fields.
6. Select the fields that are mentioned below in the GROUP ROWS section.
  - a. Rice taken by shops

The screenshot shows the Salesforce report builder interface. The report title is "rice mills with consumers range of amount per day". The report type is "range of amount per day". The report preview shows a table with columns: "Rice taken by shops", "consumer: consumer Name", "Rice type", "rice price/kg", "Mode of payment", and "Amount Paid". The data is grouped by "Rice taken by shops". The report includes subtotals for each group and a grand total at the bottom. The report builder interface on the left shows the selected groups ("Rice taken by shops") and columns ("consumer: consumer Name", "Rice type", "rice price/kg", "Mode of payment", "# Amount Paid"). Buttons for "Add Chart", "Save & Run", "Save", "Close", and "Run" are visible at the top right. A checkbox for "Update Preview Automatically" is checked.

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

The screenshot shows the final saved report titled "range of amount per day". The report header includes "Report: rice mills with consumers" and "range of amount per day". It displays summary statistics: "Total Records: 10", "Total rice price/kg: 270", and "Total Amount Paid: 20,530.00". Below this is a detailed table with the same structure as the report builder, showing data grouped by "Rice taken by shops" with subtotals and a grand total. The table includes columns: "Rice taken by shops", "consumer: consumer Name", "Rice type", "rice price/kg", "Mode of payment", and "Amount Paid". The data rows correspond to the ones shown in the report builder. The report is presented in a clean, professional layout with a blue header and a white background.

**Sharing report to owner**

1. Click edit drop down and select subscribe option

Rice taken by shops	consumer: consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
8 (1)	consumers-001	normal rice	50	UPI	400.00
<b>Subtotal</b>			50		400.00
10 (1)	consumers-002	normal rice	40	Cash	400.00
<b>Subtotal</b>			40		400.00
30 (1)	consumers-003	basmati	30	Debit card	900.00
<b>Subtotal</b>			30		900.00
34 (1)	consumers-009	basmati	50	Cash	1,700.00
<b>Subtotal</b>			50		1,700.00
40 (2)	consumers-006	basmati	80	UPI	3,200.00
	consumers-005	normal rice	70	Net banking	2,800.00
<b>Subtotal</b>			150		6,000.00
42 (1)	consumers-008	normal rice	30	Credit card	1,260.00
<b>Subtotal</b>			30		1,260.00
45 (1)	consumers-007	basmati	40	Debit card	1,800.00
<b>Subtotal</b>			40		1,800.00
<b>Total Records</b>	<b>Total rice price/kg</b>	<b>Total Amount Paid</b>			
10	270	20,530.00			

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

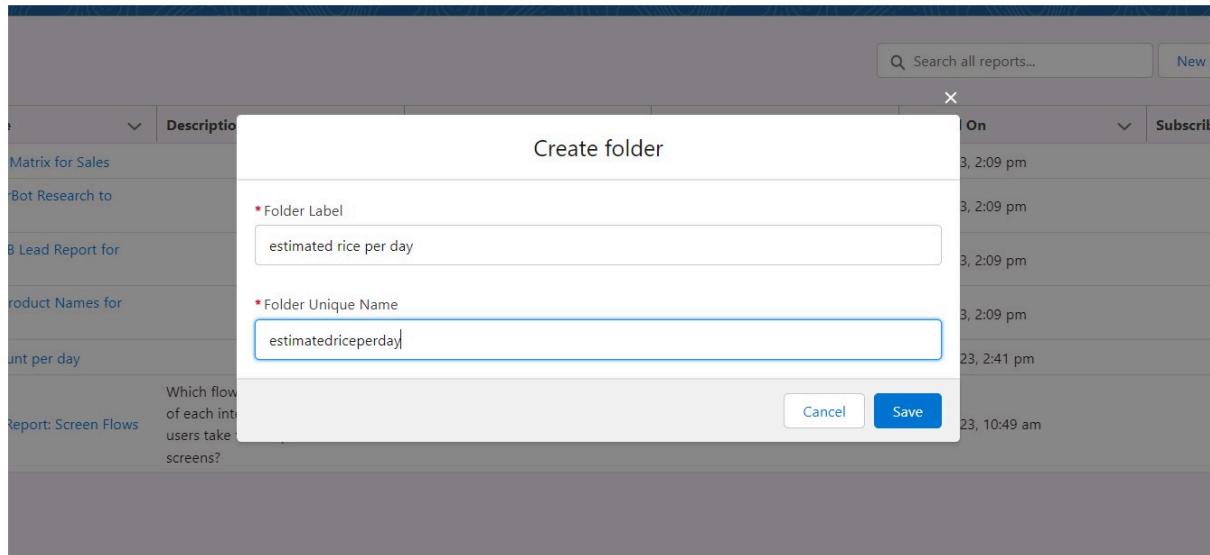
[Cancel](#)   [Save](#)

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.

## Create a report folder

1. Click on the app launcher and search for reports.

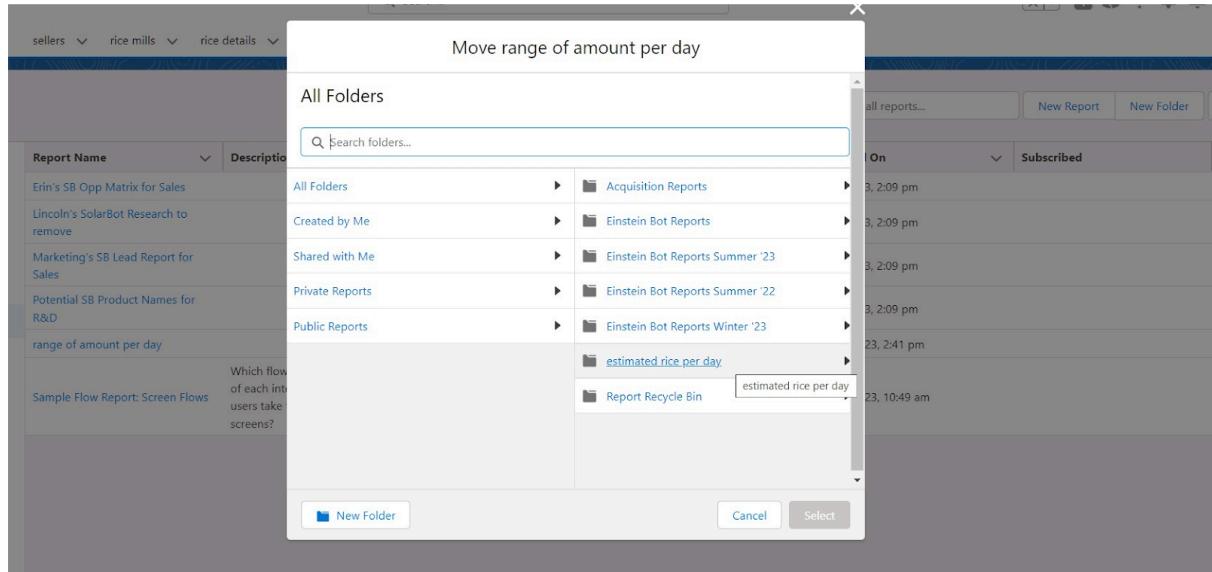
2. Double click on the report, “ reports tab” will be auto populated in the navigation bar.
3. Click on the report tab, click on the new folder.
4. Give the Folder label as “estimated rice per day ”, Folder unique name will be auto populated.
5. Click save.



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

The screenshot shows the Salesforce Reports interface with a context menu open over a specific report row. The menu options include Run, Edit, Subscribe, Export, Delete, Add to Dashboard, Favorite, and Move, with "Move" being highlighted. The report table lists various reports like "Opportunities by Rep and Close Month", "Opportunities to Work", "Opportunity Stages", "Pipeline Matrix Report Current FQ", "Sales Rep Win Rates", and "Sample Flow Report: Screen Flows". The sidebar on the left shows categories like Reports, Folders, and Favorites, with "All Reports" currently selected.

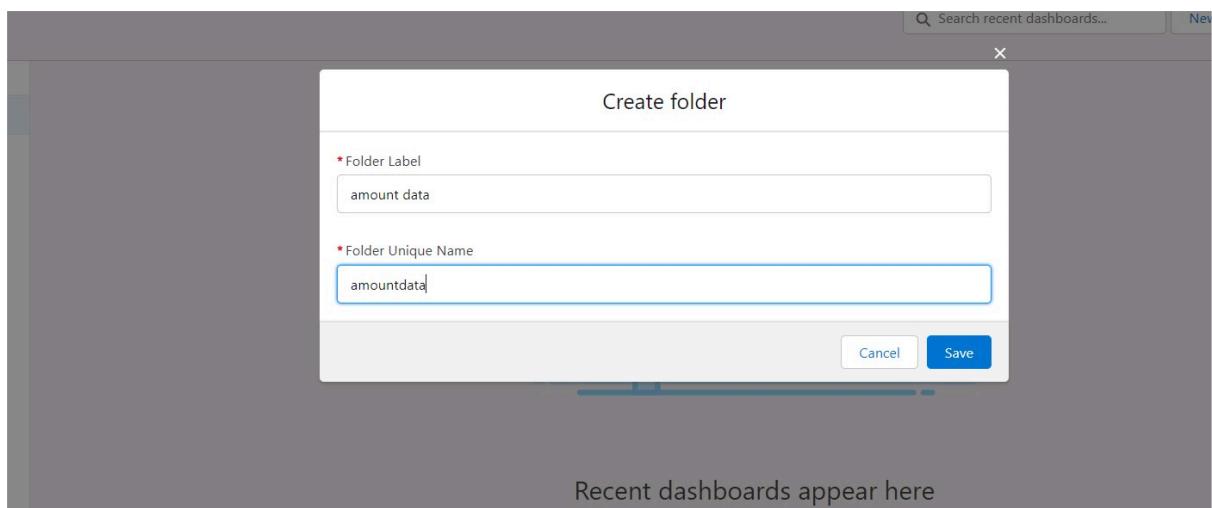
5. Select estimated rice per day folder and select folder.



# Task 12: Creating Dashboard

## Create Dashboard Folder

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



## Create Dashboard

1. Go to the app >> click on the Dashboards tabs.
2. Give a Name and select the folder that was created, and click on create.

**Save As**

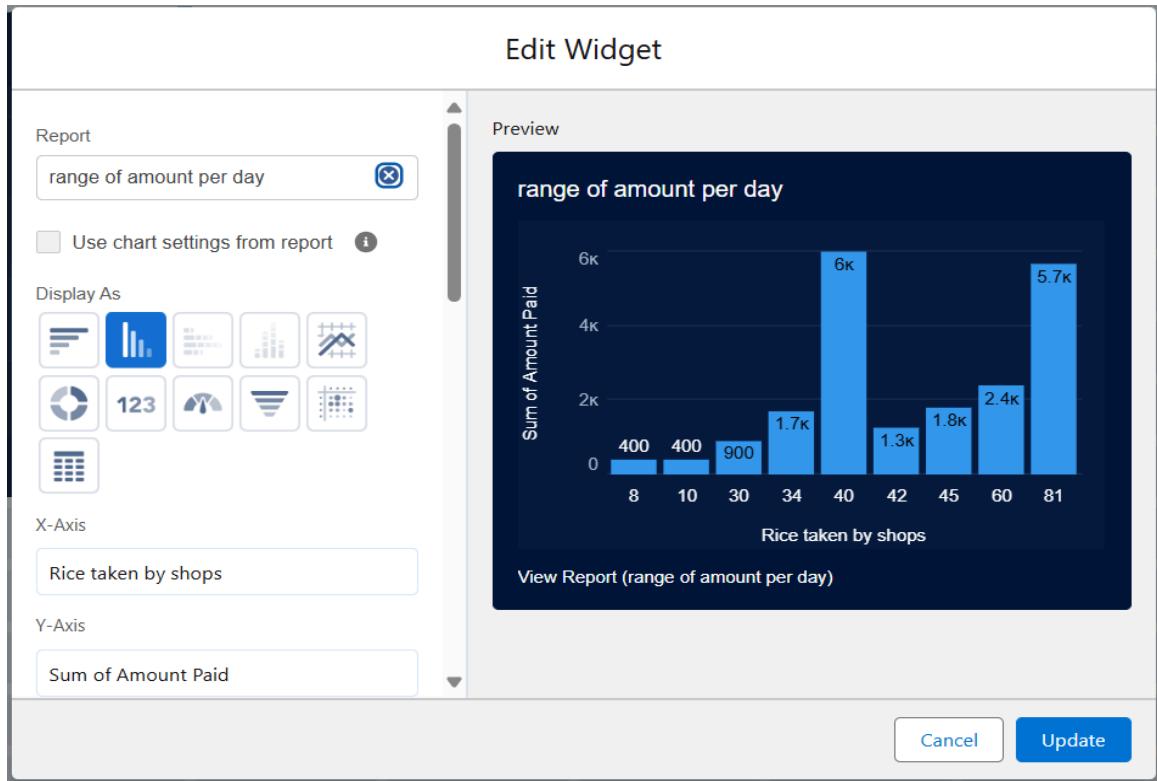
---

\*Name

Description

Folder

3. Select add component.
4. Select a Report and click on select.
5. 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,

1. 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

Click add.

Click save and done.

## Edit Widget

Report

range of amount per day

Use chart settings from report i

Display As

Value

Sum of Amount Paid

Sliced By

Rice taken by shops

Preview

range of amount per day

Sum of Amount Paid

Rice taken by shops

21k

6k (66.29%)

1.3k (11.82%)

1.7k (15.05%)

900 (8.44%)

View Report (range of amount per day)

8

10

30

34

40

42

# Task 13: Apex

## Creating an Apex Class(ConsumerRecord)

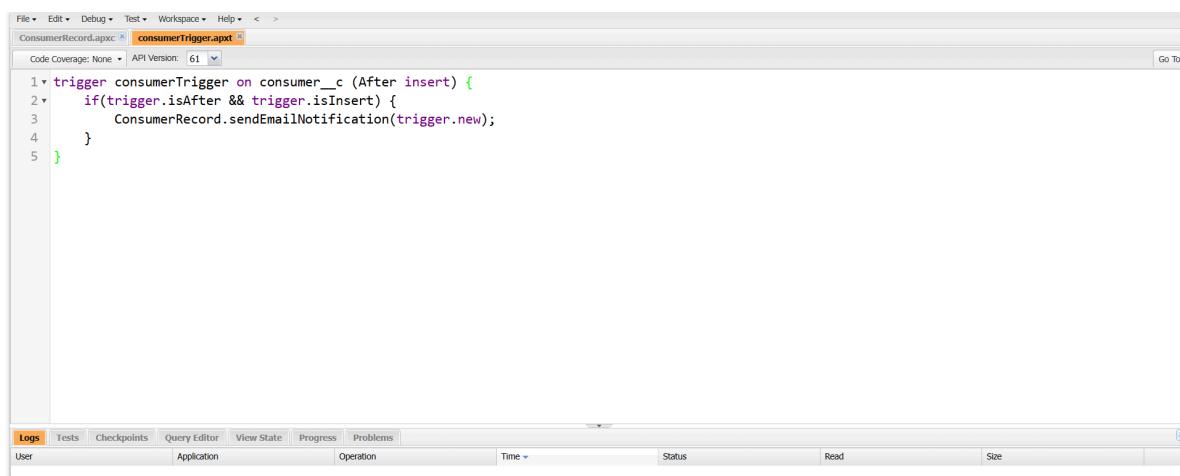
1. Login to the Salesforce account and navigate to the gear account in the top right corner.
2. Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.
3. Then you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Class.
4. Enter the name of the class(ConsumerRecord) to create a new class file.



```
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
ConsumerRecord.apc consumerTrigger.apc
Code Coverage: None API Version: 61 Go To
1 public class ConsumerRecord {
2     public static void sendEmailNotification (List<consumer__c> con){
3         for(consumer__c c:con)
4         {
5             Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
6             email.setToAddresses( new List<String>{c.email__c});
7             email.setSubject('Welcome to our company');
8             email.setPlainTextBody('Dear ' + ' '+',\n\nWelcome to MY RICE!'+'You have been seen as a valuable customer to us. Please continue
9                 'We are proud to associate with valuable customers like you and we look forward to collaborating with you
10                 +'So why taking a step back, take a leap of faith and shop with us more, while we provide with the valuable
11                 'Thankyou for buying ' +'Here are some of the products that are brought by the customers who similarl
12             Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
13         }
14     }
15 }
```

## Creating an Apex Trigger

1. Click on developer console and you will be navigated to a new console window.
2. Click on the File menu in the toolbar, and click on new >> Trigger.
3. Enter the trigger name and the object to be triggered.



```
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
ConsumerRecord.apc consumerTrigger.apx
Code Coverage: None API Version: 61 Go To
1 trigger consumerTrigger on consumer__c (After insert) {
2     if(trigger.isAfter && trigger.insert) {
3         ConsumerRecord.sendEmailNotification(trigger.new);
4     }
5 }
```

**Thank you**