

A CRM APPLICATION FOR WHOLESALE RICE MILL

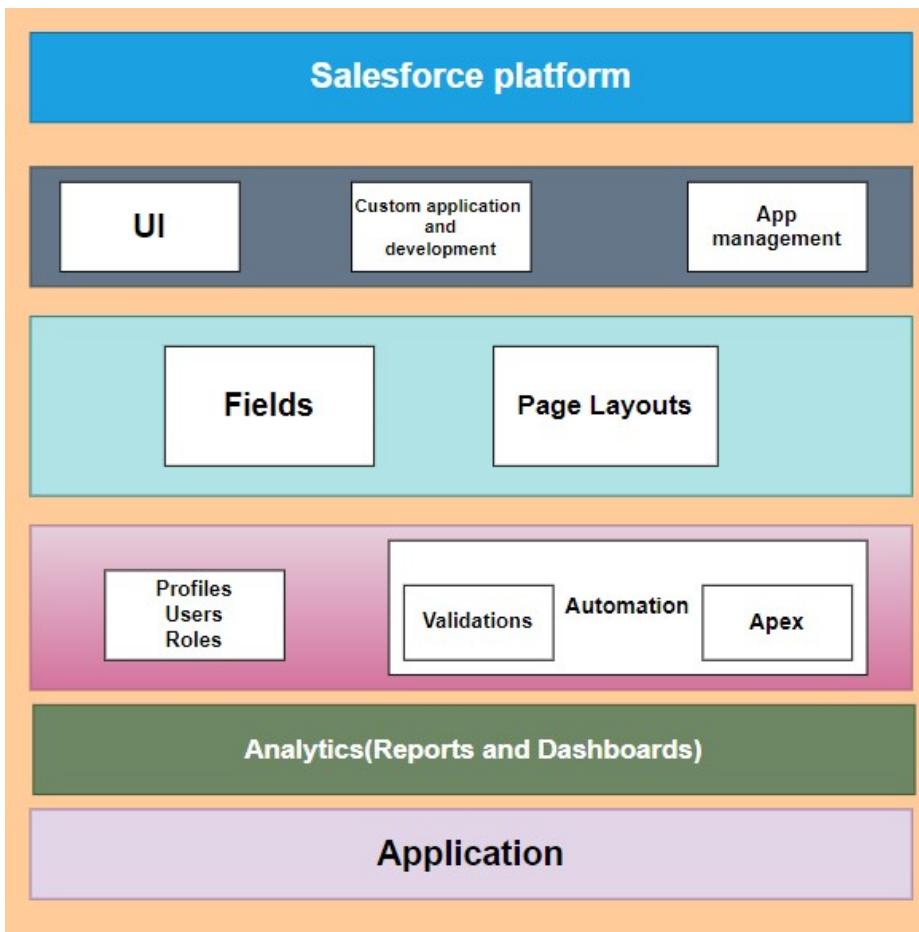
Short Description:

The Rice Mill Crm Streamlines Daily Rice Production and Sales Reporting,Enhancing Efficiency and Customer Experiences.

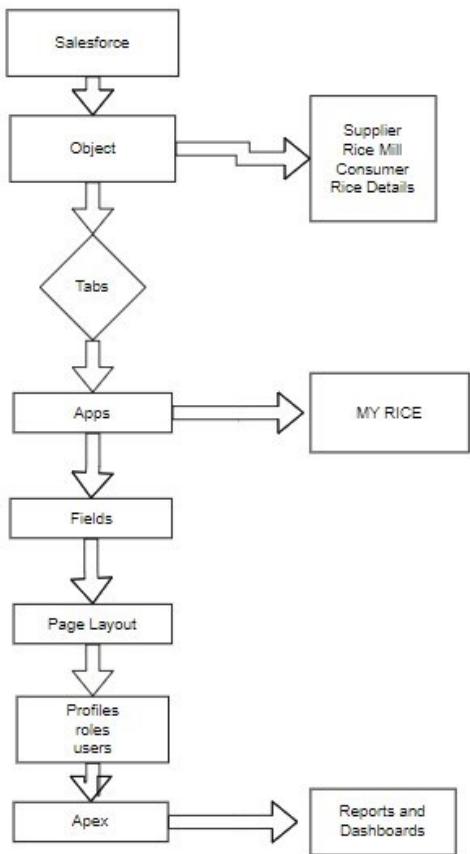
Long Description:

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.

Technical Architecture:



Project Flow:



Features and Functionality:

Reports 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.

Roll Up 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.

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

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

Pre-requisites

Salesforce Developer account

Knowledge of the salesforce admin concepts.

Installed with 2 web browsers in the Machine

Good internet connectivity.

What you'll learn

1. Real Time Salesforce Project
2. Object & Relationship in Salesforce
3. Formula fields and Validation rules.
4. Cross object formula fields.
5. Page layouts.
6. Rollup summary fields.
7. Reports and dashboards

Milestones and Activities:

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.

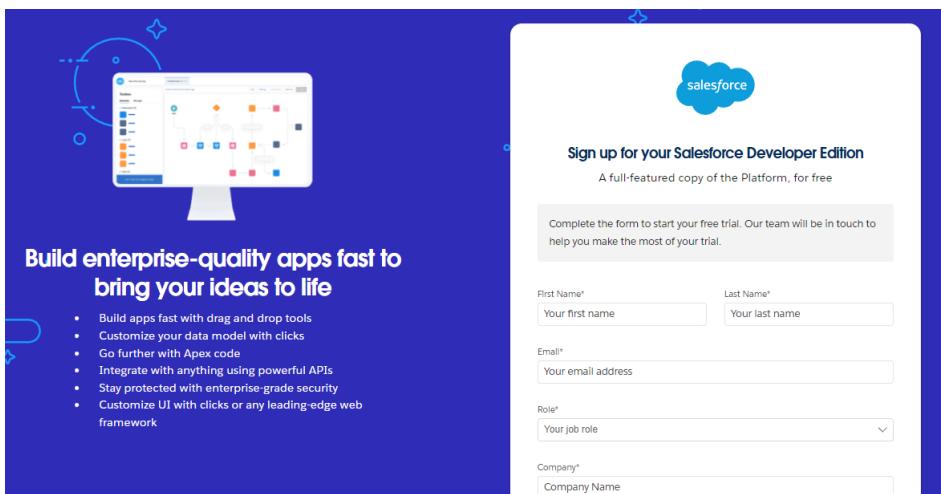
So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3lGde5k>

Activity 1: Creating Developer Account:

Creating a developer org in salesforce.

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



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

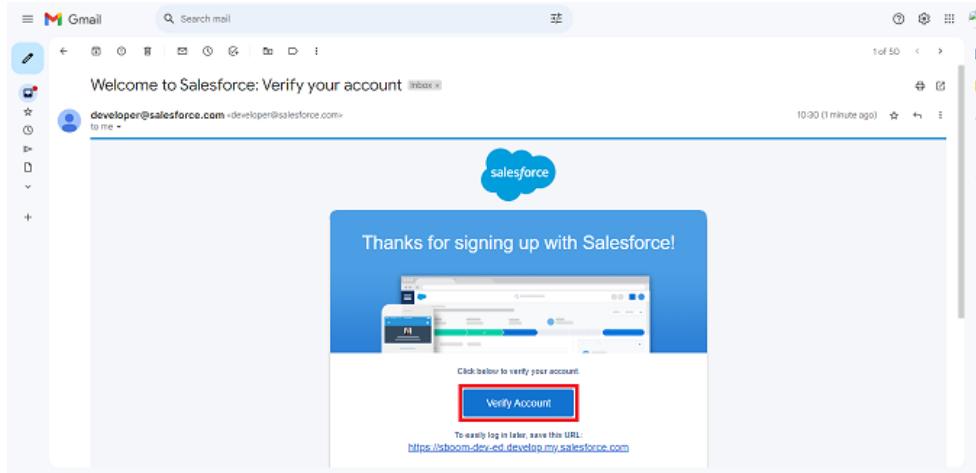
This need not be an actual email id, you can give anything in the format :

[username@organization.com](#)

Click on sign me up after filling these.

Activity 2: Account Activation:

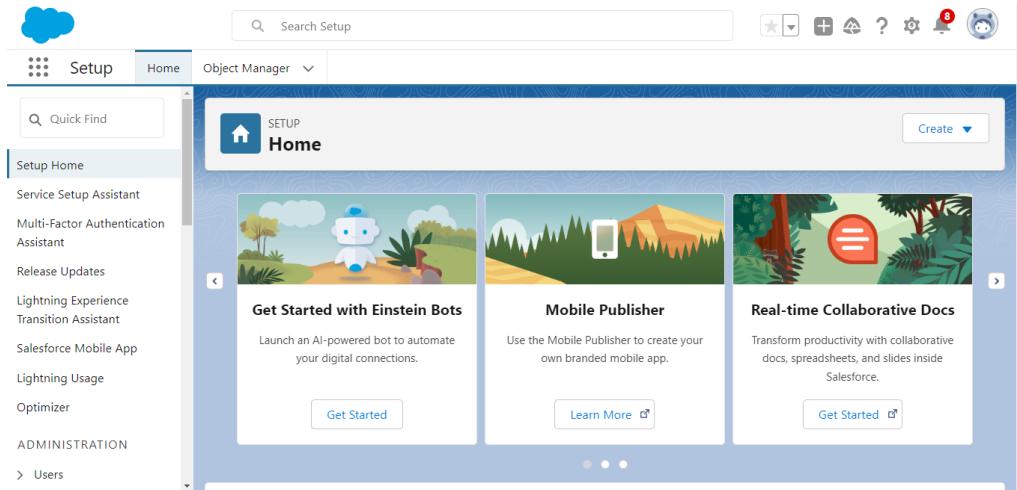
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



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

The screenshot shows the "Change Your Password" page. The title is "Change Your Password". A note says "Enter a new password for lead@sb.oom. Make sure to include at least:" followed by three requirements: "8 characters", "1 letter", and "1 number", each with a green checkmark. A red box highlights the "New Password" field, which contains "....." and is labeled "Good". Another red box highlights the "Confirm New Password" field, which also contains "....." and is labeled "Match". Below these fields is a "Security Question" section with a dropdown menu showing "In what city were you born?". A red box highlights the "Answer" field, which contains "asdfghjkl". At the bottom is a large blue "Change Password" button.

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



Milestone 2- Object

What Is an Object?

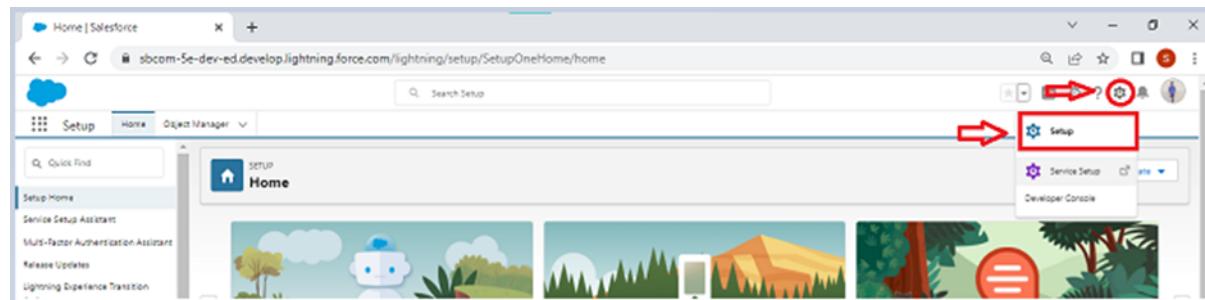
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

Salesforce objects are of two types:

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

To Navigate to Setup page:

Click on gear icon → click setup.



To create an object:

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

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup' and 'Object Manager'. A large black arrow points from the text above to the 'Object Manager' button. To the right of the 'Object Manager' button is a 'Create' button with a dropdown arrow, which is also circled in red. Another red arrow points down to the 'Custom Object' option under the 'Create' button.

- On Custom object defining page:
- Enter the label name, plural label name, click on Allow reports, Allow search.

This screenshot shows the 'New Custom Object' setup page. It includes fields for 'Label' and 'Plural Label', both of which are highlighted with red boxes. Below these, there are sections for 'Custom Object Information' and 'Record Name Label and Format', each with its own set of input fields. In the 'Optional Features' section, the 'Allow Reports' and 'Allow Search' checkboxes are checked and highlighted with red boxes. At the bottom of the page, the 'Save & New' button is also highlighted with a red box.

This screenshot continues from the previous one, focusing on the 'Optional Features' section. It shows checkboxes for 'Allow Reports' (which is checked and highlighted with a red box), 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'. Below this is the 'Object Classification' section with checkboxes for 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'. Further down are sections for 'Deployment Status' (with 'Deployed' selected) and 'Search Status' (with 'Allow Search' checked and highlighted with a red box). At the very bottom, the 'Save' button is highlighted with a red box.

- Click on Save.

Activity 1: Create Supplier Object:

To create an object:

1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
 - 1) Enter the label name→ **supplier**
 - 2) Plural label name→ **supplier**
 - 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.**

Activity 2: Create Rice mill Object:

To create an object:

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

Activity 3: Create consumer Objects:

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

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

Activity 4: Create rice details Objects:

2. Use these display format for the rice details

- label name → rice details
- Plural label name → rice details
- Display Format → rice-{000}
- Starting number → 1

Milestone 3- Tabs

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

Types of Tabs:

1. Custom Tabs

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

2. Web Tabs

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

1. Visualforce Tabs

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

2. Lightning Component Tabs

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

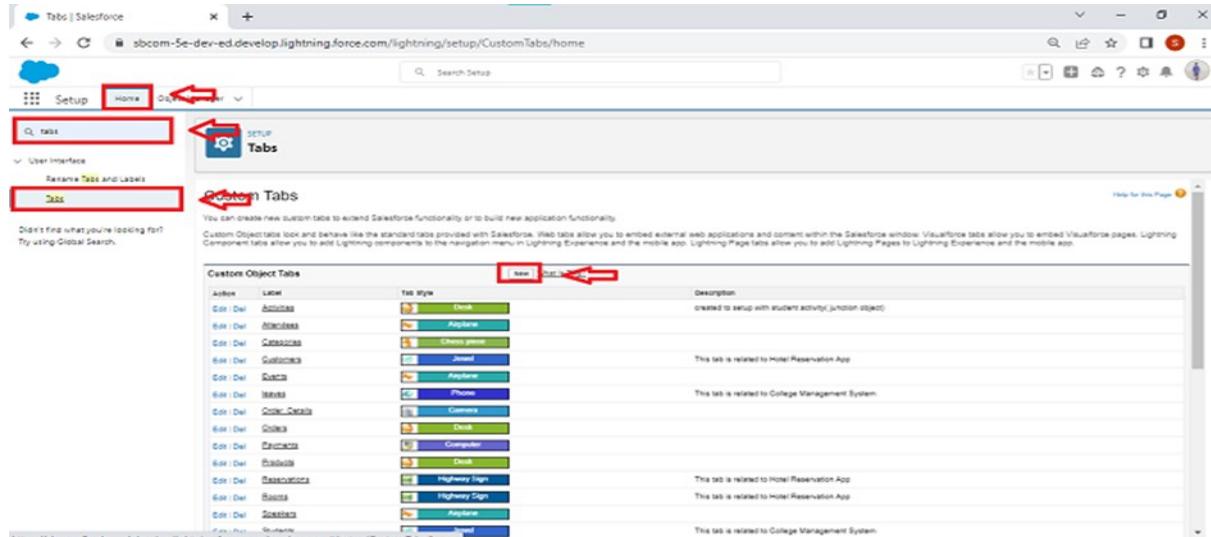
3. Lightning Page Tabs

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

Activity 1: Creating a Custom Tab

To create a Tab:(supplier)

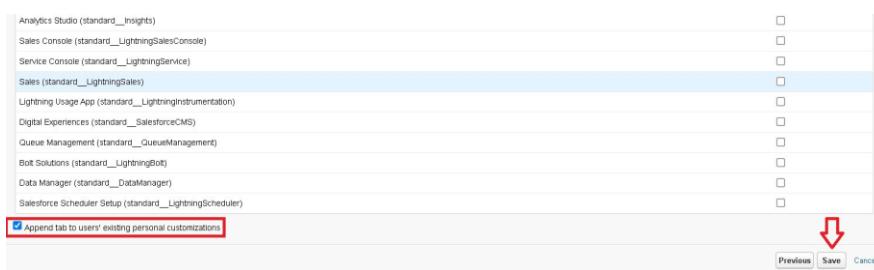
1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)



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 'Edit Custom Object Tab' page for the 'suppliers' object. The tab label is set to 'suppliers' and the tab style is 'Box'. The 'Append' checkbox is checked. The 'Save' and 'Cancel' buttons are visible at the bottom.

Action	Label	Tab Style	Description
Edit	Activities	Box	Created to setup with student/activity/Junction (24/20)
Edit	Appareas	Apex	
Edit	Categories	Chess piece	
Edit	Comments	Joined	This tab is related to Hotel Reservation App
Edit	Events	Apex	
Edit	IMs	Phone	This tab is related to College Management System
Edit	College_Courses	Camera	
Edit	Codes	Box	
Edit	Comments	Computer	
Edit	Endorsements	Box	This tab is related to Hotel Reservation App
Edit	Events	Highway Sign	This tab is related to Hotel Reservation App
Edit	Goals	Highway Sign	This tab is related to Hotel Reservation App
Edit	Opportunities	Apex	



Activity 2: Creating Remaining Tabs

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

Milestone 4- The Lightning App:

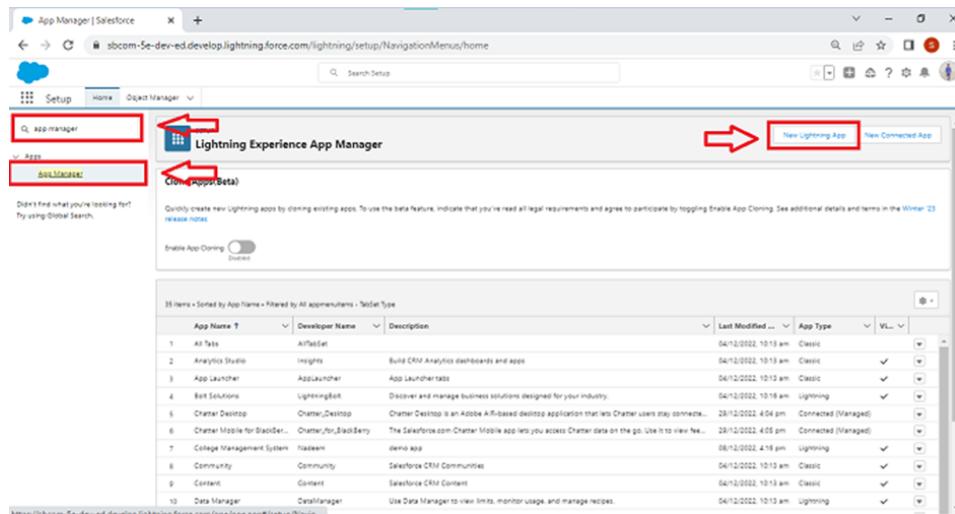
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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

Activity 1: Create a Lightning App

To create a lightning app page:

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

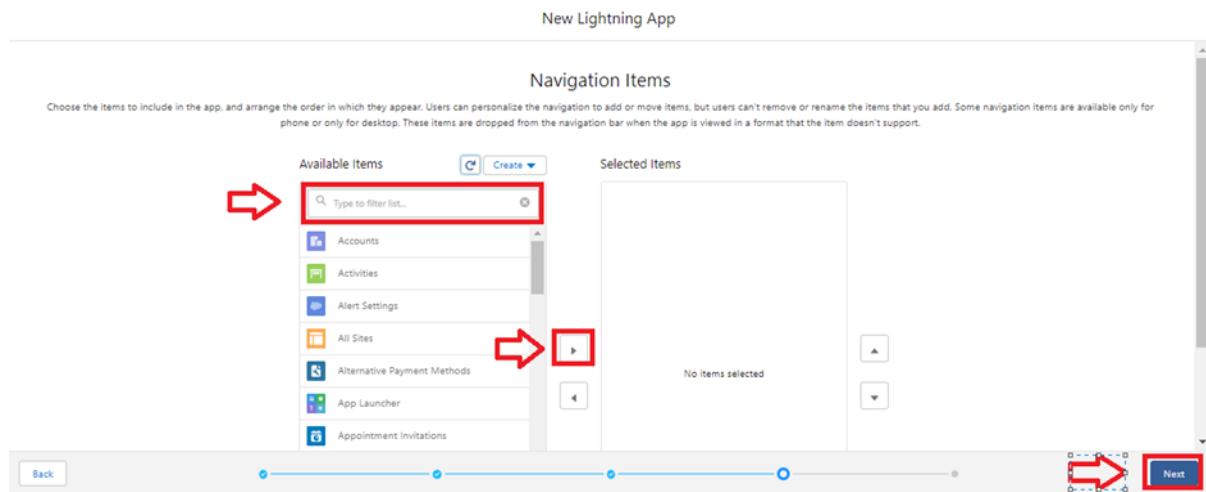


2. Fill the app name in app details as MY RICE →Next → (App option page) keep it as default → Next → (Utility Items) keep it as default → Next.

The screenshot shows the "New Lightning App" configuration page. The "App Details & Branding" section is visible. It includes fields for "App Name" (with a red arrow pointing to the input field), "Developer Name" (with a red arrow pointing to the input field), and "Description" (with a red arrow pointing to the input field). There are also sections for "App Branding" (including "Image" and "Primary Color Hex Value #007002") and "Org Theme Options" (with a checkbox for "Use the app's image and color instead of the org's custom theme"). At the bottom right, a "Next" button is highlighted with a red arrow.

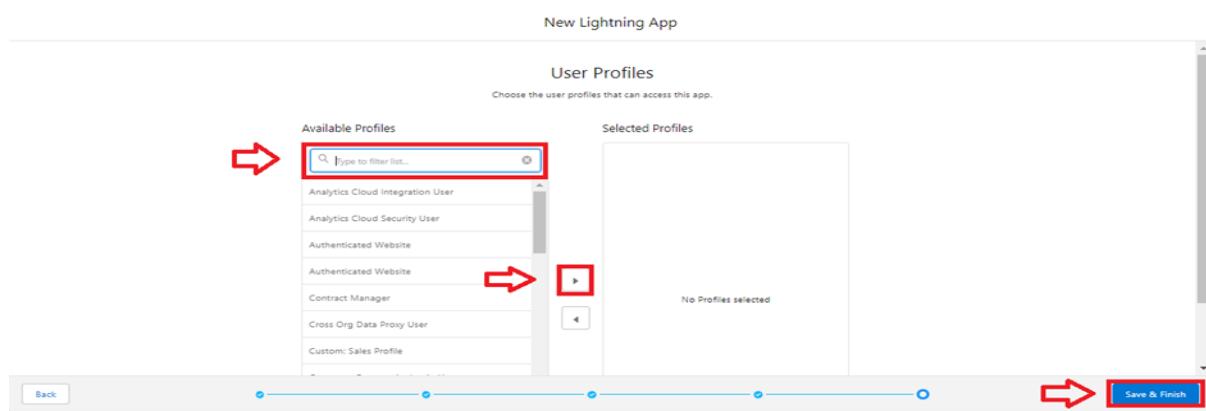
3. Upload a photo that is related to your app.

4. To Add Navigation Items:



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

5. To Add User Profiles:



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

Milestone 5 : Fields

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

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

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

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

Custom Fields:

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

Activity 1: Creating the number field in rice details object

Creating the number field in rice details object

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

The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with 'Setup' and 'Object Manager'. A red arrow points to the 'Object Manager' button. Below the navigation bar, there is a search bar with 'student' typed into it, and another red arrow points to this search bar. The main area is titled 'Object Manager' and shows two items: 'Student' and 'Student Activity'. The 'Student' item is highlighted with a red box around its 'API NAME' field, which contains 'stu'. Another red arrow points to this field. The 'Student Activity' item has its 'API NAME' field also highlighted with a red box, containing 'stuact'. The table columns are labeled 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. The 'TYPE' column for both items is 'Custom Object'. The 'DESCRIPTION' column for 'Student' says 'College Management System'. The 'LAST MODIFIED' column shows '15/12/2022' for 'Student' and '06/01/2023' for 'Student Activity'. The 'DEPLOYED' column shows checkmarks for both.

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

SETUP > OBJECT MANAGER
Supplier

Fields & Relationships

5 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Sum of Fuel supplied	Sum_of_Fuel_supplied__c	Roll-Up Summary (SUM Fuel details)		
supplier Name	Name	Text(50)	✓	

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

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label [i]

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

Length Number of digits to the left of the decimal point

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

Field Name [i]

Description

Help Text

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

Unique Do not allow duplicate values

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

AI Prediction Use this field to store AI prediction scores

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

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

Activity 2 : Creating Junction Object :

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

Creating junction object as rice details with supplier & rice mill

To create junction object

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

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

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

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

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

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

Activity 3 : Creating a Master-Detail Relationship

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

Creating Master-Detail Relationship between consumer & rice mill Object

To Create a Master-Detail relationship

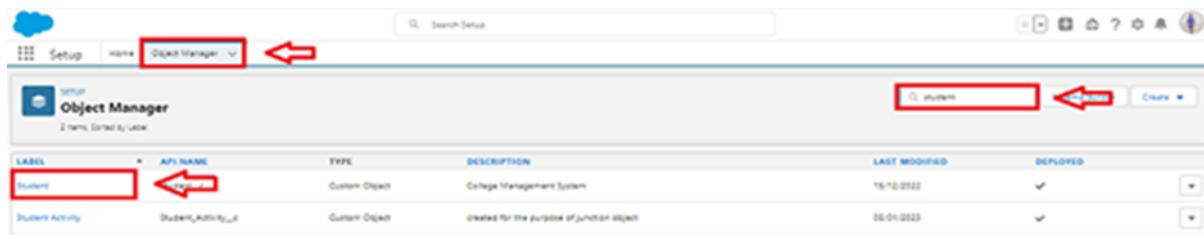
1. Go to the setup page → click on object manager → From drop down click edit for consumer object.
2. Click on fields & relationship → click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. Select the related object “rice mill”.
5. Give Field Label as “rice mill name” and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

Activity 4 : Creating the Roll-up Summary

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

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

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



The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for 'Setup', 'Home', and 'Object Manager'. A red box highlights the 'Object Manager' tab, which has a dropdown arrow pointing to it. Below the tabs, the page title is 'Object Manager' with a subtitle '2 items, Sorted by Label'. On the right, there's a search bar with 'Student' typed in and a 'Create' button. The main area displays a table with two rows. The first row is for the 'Student' object, which is highlighted with a red box. The second row is for 'Student Activity'. The columns in the table are: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The 'Student' object has an API name of 'Student', is a Custom Object, and is described as 'College Management System'. It was last modified on 15/10/2022. The 'Student Activity' object has an API name of 'Student_Activity', is also a Custom Object, and is described as 'created for the purpose of junction object'. It was last modified on 05/01/2023.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Student	Student	Custom Object	College Management System	15/10/2022	✓
Student Activity	Student_Activity	Custom Object	created for the purpose of junction object	05/01/2023	✓

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

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

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

Data Type

None Selected Select one of the data types below.

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

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

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

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

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

- The relationship field is required on all detail records

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

Help for this Page ?

Step 2 of 5

New Custom Field

Step 2. Enter the details

Field Label

Field Name

Description

Help Text

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

Previous Next Cancel

- 5.
6. Select the summarized object as “ rice details ”.
 7. Select the Rollup type as “sum”.
 8. Select the field to aggregate as “ rice distributed ”, and click Next → Next → Save.

Step 3. Define the summary calculation

Select Object to Summarize

Master Object: seller
Summarized Object: rice details

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate: rice distributed

Filter Criteria

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

Step 3 of 5

Previous Next Cancel

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

Activity 5 : Creating Fields in Objects

Creating the number field in rice details object

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

Fields & Relationships					
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Created By	CreatedById	Lookup(User)			
Last Modified By	LastModifiedById	Lookup(User)			
Owner	OwnerId	Lookup(User,Group)		✓	
Sum of Fuel supplied	Sum_of_Fuel_supplied__c	Roll-Up Summary (SUM Fuel details)			
supplier Name	Name	Text(50)		✓	

8. Select Data type as “Number” and click Next.
9. Given the Field Label as “ supplier name ” and length as “ 5 ”.

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label	<input type="text" value="supplier Name"/>
Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".	
Length	<input type="text" value="18"/> Number of digits to the left of the decimal point
Decimal Places	<input type="text" value="0"/> Number of digits to the right of the decimal point
Field Name	<input type="text" value=""/>
Description	<input type="text" value=""/>
Help Text	<input type="text" value=""/>
Required	<input type="checkbox"/> Always require a value in this field in order to save a record
Unique	<input type="checkbox"/> Do not allow duplicate values
External ID	<input type="checkbox"/> Set this field as the unique record identifier from an external system
AI Prediction	<input type="checkbox"/> Use this field to store AI prediction scores
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity

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

Activity 6: Creating Fields in rice mill Objects

1. Select Data type as “Number” and click Next.
2. Given the Field Label as “ rice price/kg ” and length as “ 5 ”

Activity 7: Creating Fields in consumer Objects

S.no	Object name	Fields	data type

1.	consumer	First name	Text
		Last name	Text
		Phone number	phone
		email	email
		Rice taken by shops	Number (length=5)
		Rice type	(Picklist values) 1.basmati 2.normal rice
		Mode of payment	Picklist values <ul style="list-style-type: none">● Credit card● Debit card● Net banking● UPI● Cash

Activity 8 : Creating Cross Object Formula Field in consumer Object

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

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

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

Step 2. Choose output type

Field Label Field Name Step 2 of 5
Previous Next Cancel

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

Formula Return Type

None Selected Select one of the data types below.

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

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

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

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

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

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

5. Insert fields formula should be :

`rice_taken_by_shops_c * rice_mill_name_r.rice_price_kg_c`

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

Simple Formula Advanced Formula

Insert Field Insert Operator ▾

amount paid (Number) =

```
rice_taken_by_shops_c * rice_mill_name_r.rice_price_kg_c
```

Functions

-- All Function Categories -- ▾

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

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

1. Creating the Formula field in consumer Object

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

2. Go to setup → click on Object Manager → type object name(consumer) in search bar → click on the object.
3. Click on fields & relationship → click on New.
4. Select Data type as “Formula” and click Next.

5. Give Field Label and Field Name as “Consumer Name” and select formula return type as “TEXT” and click next.
6. Insert field formula should be : First_Name__c + '' + Last_Name__c
7. click “Check Syntax” and Save.

The screenshot shows the Salesforce formula editor interface. At the top, there are tabs for "Simple Formula" and "Advanced Formula", with "Simple Formula" selected. Below the tabs are buttons for "Insert Field", "Insert Operator", and a dropdown menu for "Functions". The main input field contains the formula: "customer name (Text) = First_Name__c + ' ' + Last_Name__c". To the right of the input field is a sidebar titled "Functions" with a list of available functions: ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. At the bottom of the editor, there is a "Check Syntax" button and a status message: "No syntax errors in merge fields or functions. (Compiled size: 35 characters)".

8.

Activity 9 : Creating the validation rule

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

Creating the validation rule for phone number field in consumer object

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

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

SETUP > OBJECT MANAGER
consumer

Validation Rules
1 Items, Sorted by Rule Name

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

]

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

Validation Rule Edit

Save Save & New Cancel

Rule Name: phonenumeroremailblankrule

Active:

Description: phone number and email 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

- 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

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

The screenshot shows the Salesforce Validation Rule Formula Editor. The formula entered is:

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

A tooltip on the right lists various functions:

- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Below the tooltip are buttons for "Insert Selected Function", "ABS(number)", and "Help on this function".

Error Message

Example: Discount percent cannot exceed 30%

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

Error Message: please fill phone number

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

Error Location: Top of Page Field [i](#)

Buttons at the bottom: Save, Save & New, Cancel.

9.

10. Save the validation rule.

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

To Create a Page layout:

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

Page Layouts		
2 Items, Sorted by Page Layout Name		
PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
customer Layout	udayrushi yelagandula, 04/07/2023, 11:43 am	udayrushi yelagandula, 05/07/2023, 10:01 am
personal details	udayrushi yelagandula, 10/07/2023, 10:39 am	udayrushi yelagandula, 10/07/2023, 10:39 am

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

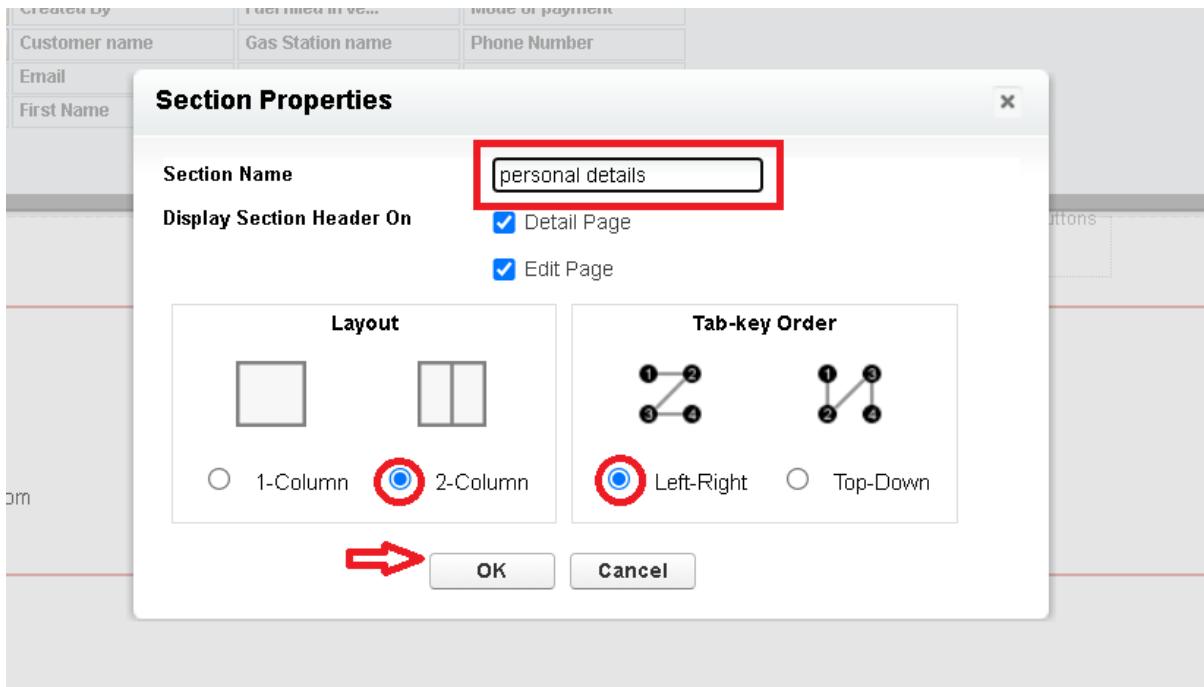
Create New Page Layout

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

Existing Page Layout	custom page
Page Layout Name	customer layout

Save **Cancel**

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



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

12. .

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

product info	
rice type	Sample Text
rice taken by shops	47.917

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

receipt details	
mode of payments	Sample Text
amount paid	313.59

Milestone 7 : Profiles

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

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

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

We cannot deleted standard ones

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

2. Custom Profiles:

Custom ones defined by us.

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

Activity 1: owner Profile

To create a new profile:

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

Profile Detail

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

Page Layouts

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

2.

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

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

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

4.

Session Settings

5. Give access and save it.

Activity 2: employer Profile

1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (Standard Platform User) → enter profile name (employer) → Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the rice mill..

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

The screenshot shows the Salesforce 'Profiles' page under the 'SETUP' tab. It displays two permission sets side-by-side:

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

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

5. And click save.

Activity 3: worker Profile

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

5. And click save.

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:

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

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



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

Role Edit	
New Role	
Label	<input type="text" value="owner"/>
Role Name	<input type="text" value="owner"/> <small>i</small>
This role reports to	<input type="text" value="CEO"/> <small>Q</small>
Role Name as displayed on reports	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="Cancel"/>	

- 2.
3. Click and save it.

Activity 2: Creating employer roles

Creating another two roles under manager

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

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#) [Show in tree view](#)

```

graph TD
    smartbridge[smartbridge] --> CEO[CEO]
    CEO --> CFO[CFO]
    CEO --> COO[COO]
    CEO --> HR[HR]
    CEO --> owner[owner]
    CEO --> SVPCustomerService[SVP.Customer Service & Support]
    CEO --> SVPHumanResources[SVP.Human Resources]
    CEO --> SVPSalesMarketing[SVP.Sales & Marketing]
    CFO --> AddRole1[Add Role]
    COO --> AddRole2[Add Role]
    HR --> AddRole3[Add Role]
    owner --> AddRole4[Add Role]
    SVPCustomerService --> AddRole5[Add Role]
    SVPHumanResources --> AddRole6[Add Role]
    SVPSalesMarketing --> AddRole7[Add Role]
  
```

3.

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

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

```

graph TD
    owner[owner] --> Manager[Manager]
    owner --> OnSiteEmployee[On Site Employee]
    owner --> RemoteEmployee[Remote Employee]
    owner --> employer[employer]
    owner --> SVPCustomerService[SVP.Customer Service & Support]
    owner --> CustomerSupportInternational[Customer Support International]
    owner --> CustomerSupportNorthAmerica[Customer Support North America]
    owner --> InstallationRepairServices[Installation & Repair Services]
    owner --> SVPHumanResources[SVP.Human Resources]
    owner --> SVPSalesMarketing[SVP.Sales & Marketing]
    owner --> VPInternationalSales[VP.International Sales]
    owner --> VPMarketing[VP.Marketing]
    Manager --> AddRole1[Add Role]
    OnSiteEmployee --> AddRole2[Add Role]
    RemoteEmployee --> AddRole3[Add Role]
    employer --> AddRole4[Add Role]
    SVPCustomerService --> AddRole5[Add Role]
    CustomerSupportInternational --> AddRole6[Add Role]
    CustomerSupportNorthAmerica --> AddRole7[Add Role]
    InstallationRepairServices --> AddRole8[Add Role]
    SVPHumanResources --> AddRole9[Add Role]
    SVPSalesMarketing --> AddRole10[Add Role]
    VPInternationalSales --> AddRole11[Add Role]
    VPMarketing --> AddRole12[Add Role]
  
```

7. 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

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

The screenshot shows the 'User Edit' page in the Salesforce setup interface. The top navigation bar includes 'SETUP' and 'Users'. The page title is 'User Edit' for 'vicky y'. The 'General Information' section contains the following field values:

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

On the right side, under 'Role', 'owner' is selected. Under 'User License', 'Salesforce' is selected. Under 'Profile', 'owner' is selected. The 'Active' checkbox is checked. A legend indicates that red boxes and asterisks (*) denote required information. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

Save it.

Activity 2: creating another users

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

13. Fill in the fields

14. First Name : ram

15. Last Name : ram

16. Alias : Give a Alias Name

17. Email id : Give your Personal Email id

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

19. Nick Name : Give a Nickname

20. Role : employer

21. User license : Salesforce platform

22. Profiles : standard platform user.

The screenshot shows the Salesforce User Edit interface. At the top, there's a header with a user icon, 'SETUP', and 'Users'. Below it, the page title is 'User Edit' and the record name is 'vicky y'. There are three buttons: 'Save', 'Save & New', and 'Cancel'. A note says 'I = Required Information'. The main area is divided into 'General Information' and 'Advanced Settings'. In 'General Information', fields include: First Name ('vicky'), Last Name ('y'), Alias ('ivy'), Email ('ramesh0820@gmail.com'), Username ('ramesh0820@754123gmail'), Nickname ('vicky'), Title (empty), Company (empty), Department (empty), and Division (empty). In 'Advanced Settings', fields include: Role ('owner'), User License ('Salesforce'), Profile ('owner'), Active (checkbox checked), Marketing User (checkbox empty), Offline User (checkbox empty), Knowledge User (checkbox empty), Flow User (checkbox empty), Service Cloud User (checkbox empty), Site.com Contributor User (checkbox empty), Site.com Publisher User (checkbox empty), WDC User (checkbox empty), Data.com User Type ('--None--'), and Data.com Monthly Addition Limit ('300').

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

24. Fill in the fields

25. First Name : ragu

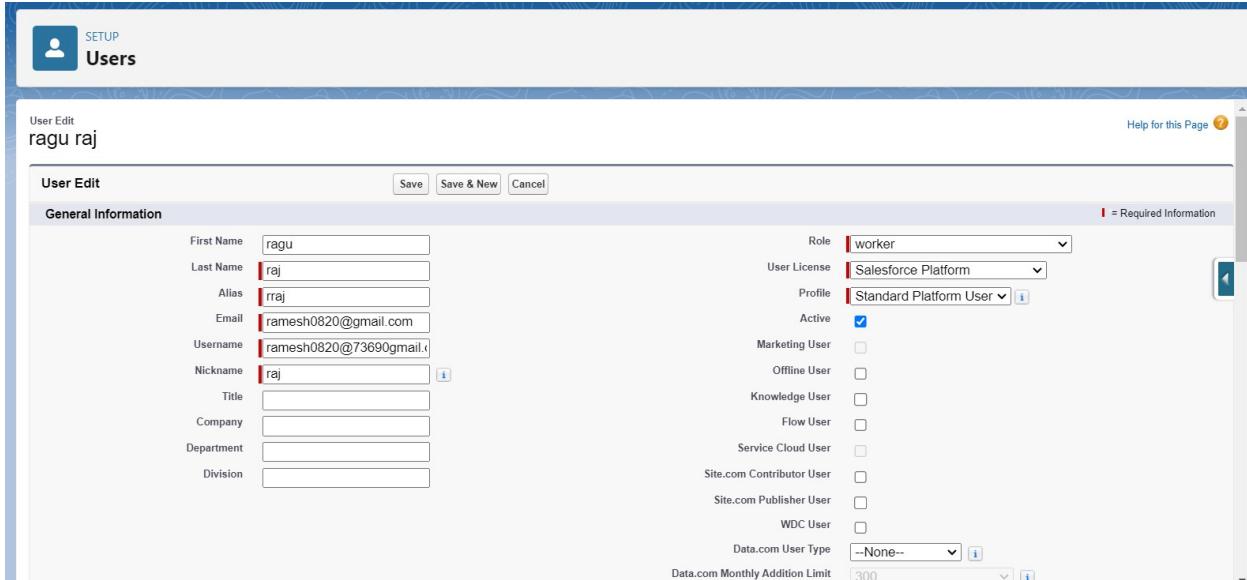
26. Last Name : raj

27. Alias : Give a Alias Name

28. Email id : Give your Personal Email id

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

30. Nick Name : Give a Nickname
 31. Role : worker
 32. User license : Salesforce platform
 33. Profiles : standard platform user.



The screenshot shows the Salesforce 'User Edit' page for a user named 'ragu raj'. The 'General Information' section contains fields for First Name (ragu), Last Name (raj), Alias (rraj), Email (ramesh0820@gmail.com), Username (ramesh0820@73690gmail.com), Nickname (raj), Title, Company, Department, and Division. On the right side, under 'Profile', the 'Role' is set to 'worker', 'User License' to 'Salesforce Platform', and 'Profile' to 'Standard Platform User'. The 'Active' checkbox is checked. Below these, there are several optional checkboxes for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. A dropdown for 'Data.com User Type' is set to '--None--'. At the bottom, the 'Data.com Monthly Addition Limit' is set to 300.

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.

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

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculations.

Manage sharing settings for: All Objects

[Disable External Sharing Model](#)

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

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

**Note : create the latest “10” records in consumer objects.
Try to fill every field in each record for better experience.**

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.

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

Types of Reports in Salesforce

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

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

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

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

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

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

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

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

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

Activity 1: Create Report

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

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

Report Type Name	Category
rice mills with consumers	Standard

1. Their outline pane is opened already, select the fields that are mentioned below in the column section.
 - 1.consumer name
 - 2.rice type
 - 3.rice price/kg
 - 4.mode of payments
 - 5.amount paid
2. Remove the unnecessary fields.
3. Select the fields that are mentioned below in the GROUP ROWS section.
 - a. Rice taken by shops.

My Rice suppliers ▾ rice mills ▾ rice details ▾ consumers ▾ * Reports ▾ X

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

Fields Outline Filters ✓ Previewing a limited number of records. Run the report to see everything.

Groups ✓ GROUP ROWS Add group... 🔍

rice taken by shops X

Columns ✓ Add column... 🔍

consumer: consumer name X

rice type X

rice price/kg X

mode of payments X

amount paid X

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

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

Row Counts Detail Rows Subtotals Grand Total

Update Preview Automatically

Conditional For

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

Report: rice mills with consumers
range of amount per day

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

Enable Field Editing ✓ Add Chart ▼ Edit ▼

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

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

Row Counts Detail Rows Subtotals Grand Total

Activity 2: Sharing report to owner

1. Click edit drop down and select subscribe option

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

- 2.
3. 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

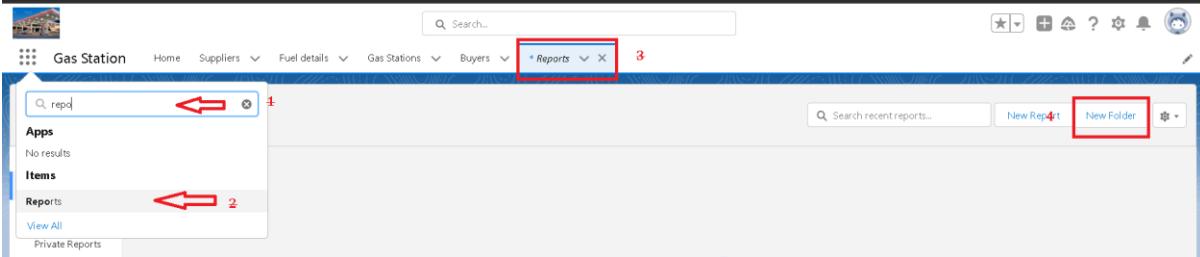
Cancel Save

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

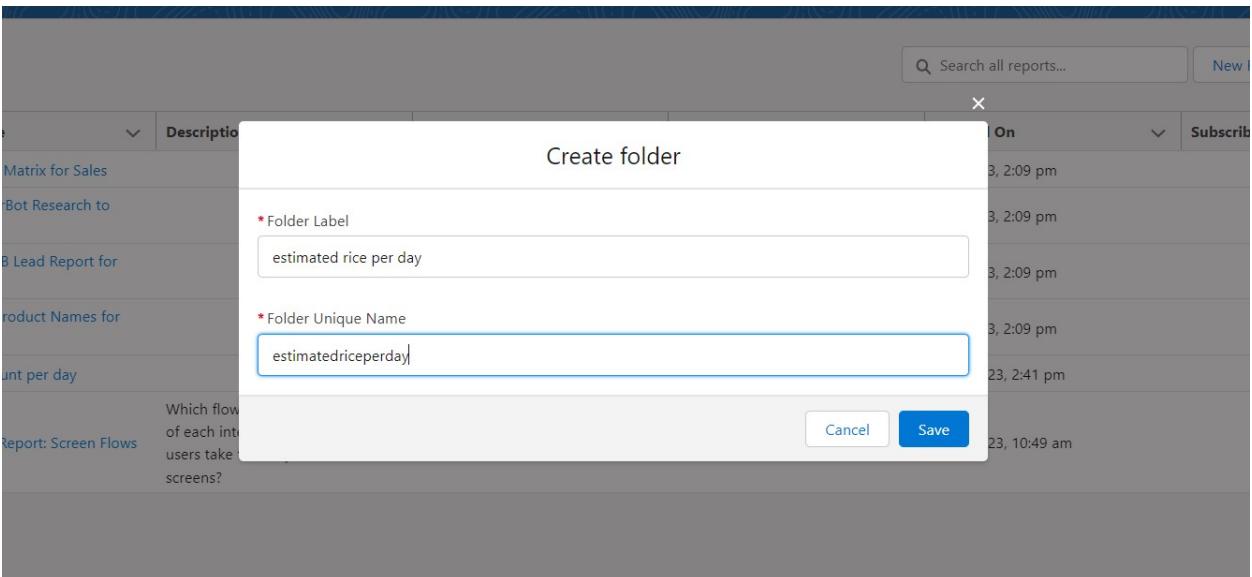
NOTE: The owner gets daily email notification of that rice mill report so that he can see all data remotely.

Activity 3: create a report folder

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



4. Give the Folder label as “estimated rice per day ”, Folder unique name will be auto populated.
5. Click save.



- 1.navigate to app launcher and click reports on that.
- 2.click all reports.
3. Select the range of amount per day drop down in that click move.
- 4.

The screenshot shows the Salesforce Reports interface. On the left, there's a sidebar with categories like REPORTS, FOLDERS, and FAVORITES. The main area lists reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. A specific report titled 'range of amount per day' is selected. A context menu is open next to it, listing options: Run, Edit, Subscribe, Export, Delete, Add to Dashboard, Favorite, and Move.

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

This screenshot shows a modal dialog titled 'Move range of amount per day'. It has two main sections: 'All Folders' on the left and a list of 'Reports' on the right. The 'Reports' list includes 'Erin's SB Opp Matrix for Sales', 'Lincoln's SolarBot Research to remove', 'Marketing's SB Lead Report for Sales', 'Potential SB Product Names for R&D', 'range of amount per day', and 'Sample Flow Report: Screen Flows'. The report 'estimated rice per day' is highlighted in the list. At the bottom of the dialog are 'New Folder', 'Cancel', and 'Select' buttons.

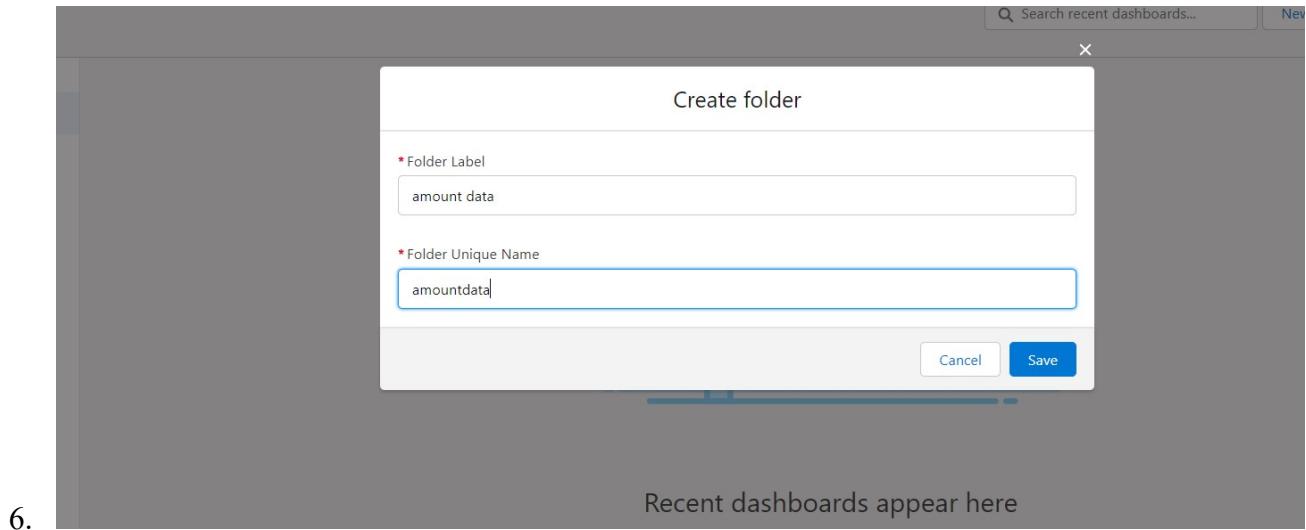
Note: if you want to see the report which you have created then go to reports - all folders - estimated rice per day - your report will appear in this way.

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.

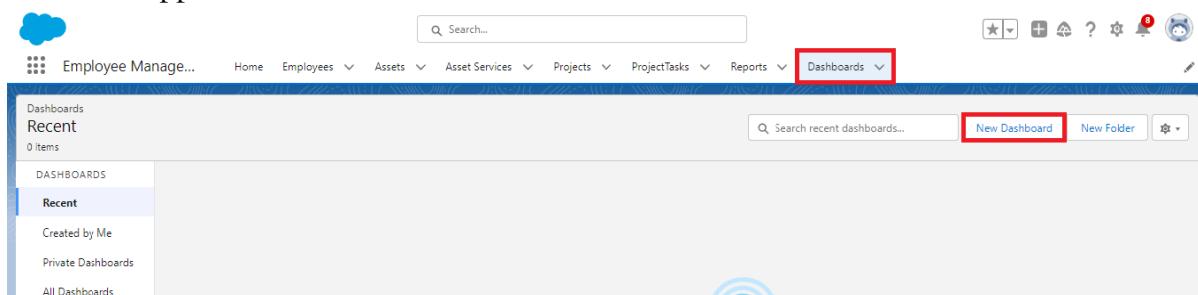
Activity 1: Create Dashboard Folder

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

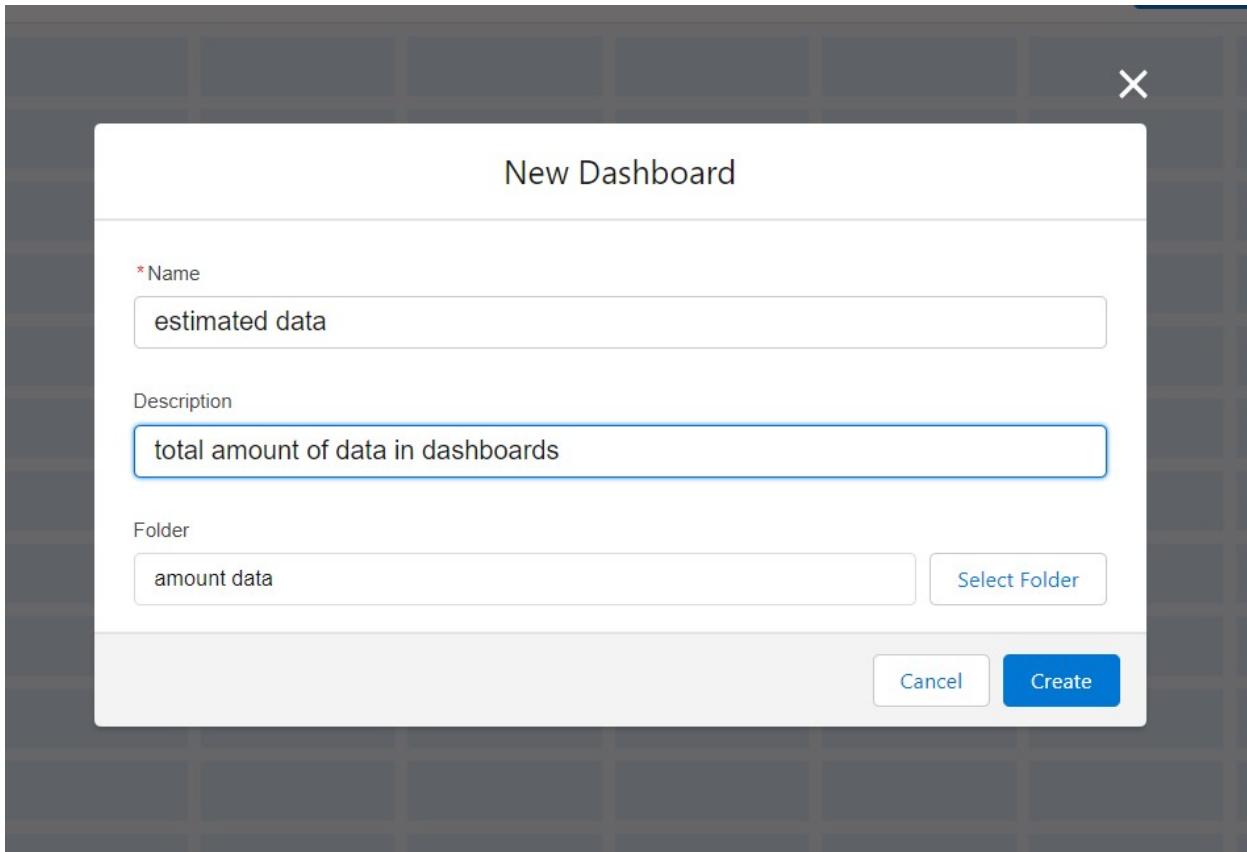


Activity 2: Create Dashboard

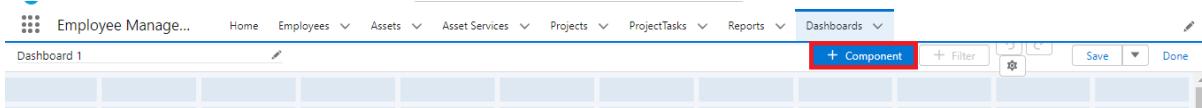
1. Go to the app → click on the Dashboards tabs.



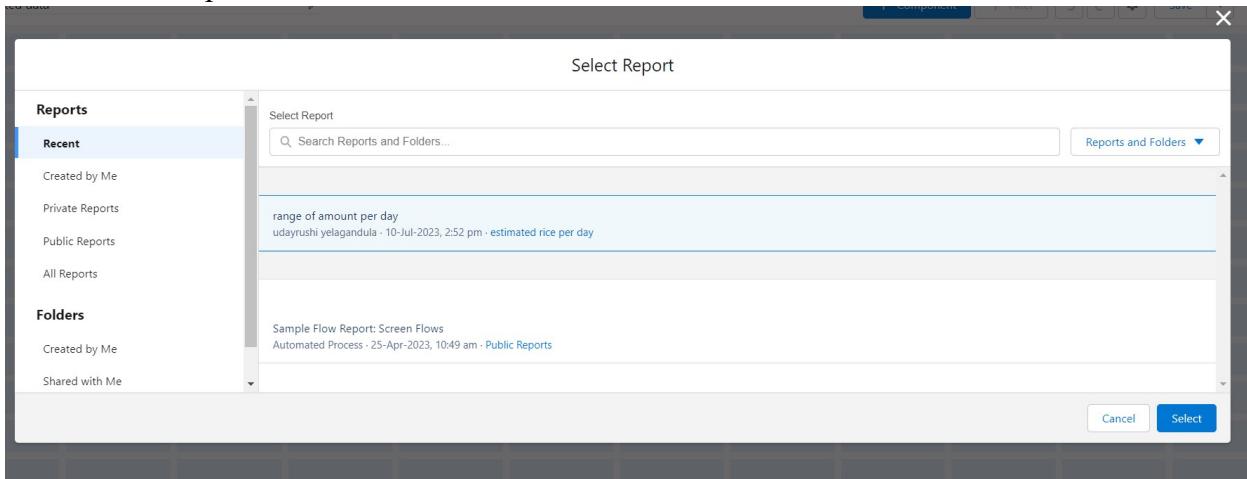
2. Give a Name and select the folder that was created, and click on create.



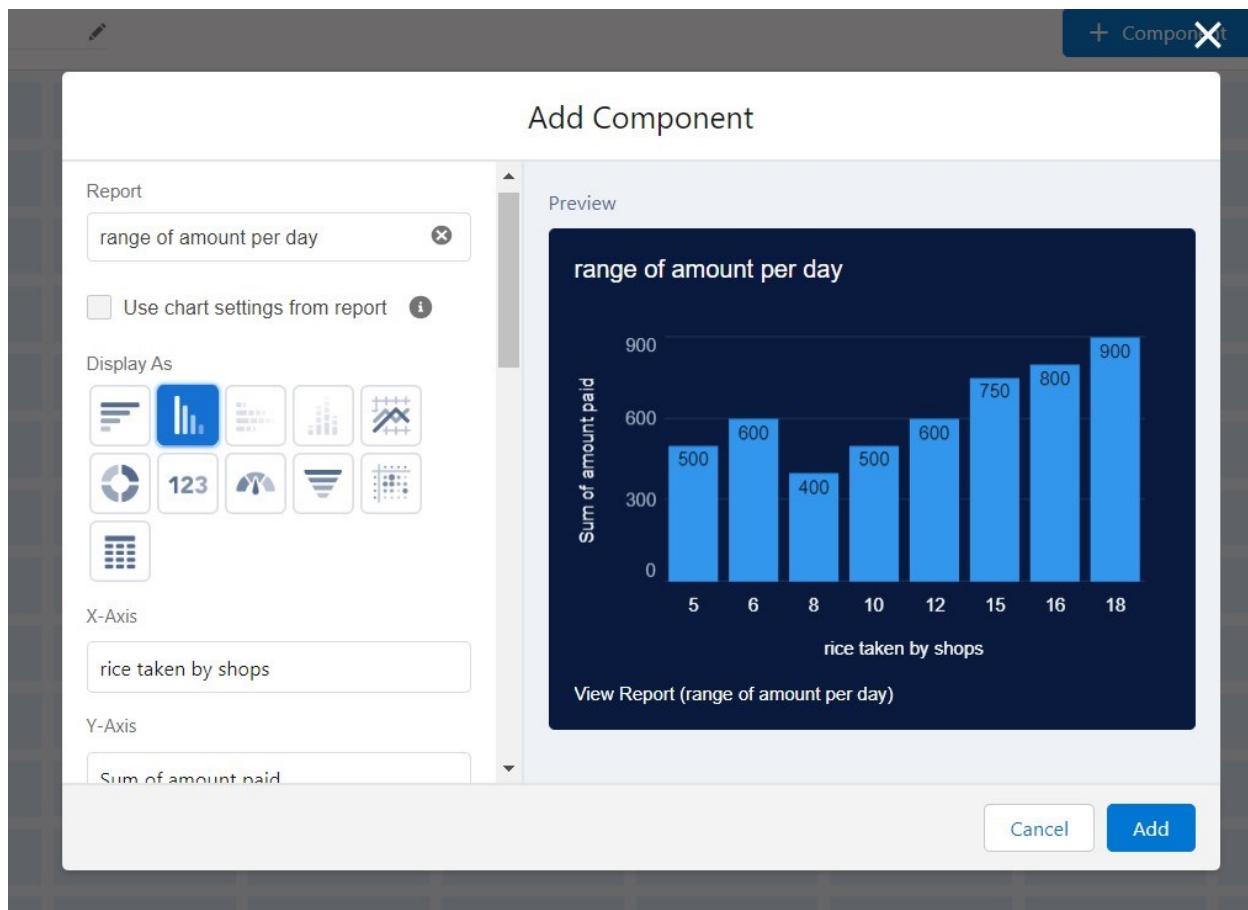
1. Select add component.



1. Select a Report and click on select.



1. Preview is shown below.



Display as- vertical bar chart

X-axis - rice taken by shops

Y-axis- sum of amount

Y-axis range - automatic

Sort by - rice taken by shops

Component theme - dark.

Add the component

Again select add component with above same steps

- 1.display as donut chart
- 2.sort by - sum of amount
- 3.title-range of amount per day
- 4.component theme dark

Value

Sum of amount paid

Sliced By

rice taken by shops

Display Units

Shortened Number

Show Values
 Show Percentages
 Combine Small Groups into "Others"
 Show Total

Decimal Places

Automatic

Click add.

Click save and done.

+ Component X

Add Component

Report

range of amount per day X

Use chart settings from report i

Display As

123

Value

Sum of amount paid

Sliced By

Preview

range of amount per day

Sum of amount paid

rice taken by shops

8 (Blue)

5 (Light Blue)

10 (Purple)

6 (Light Purple)

12 (Teal)

15 (Dark Teal)

750 (22.39%)

400 (11.94%)

500 (14.93%)

600 (17.91%)

600 (17.91%)

500 (14.93%)

5.1k

View Report (range of amount per day)

Cancel Add