

CRM APPLICATION FOR WHOLE SALE RICE MILL

Overview

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

Features and Functionality

Reporting and Dashboards:

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

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.

1. Introduction to Salesforce

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?".

1.1 Creating Developer Account

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

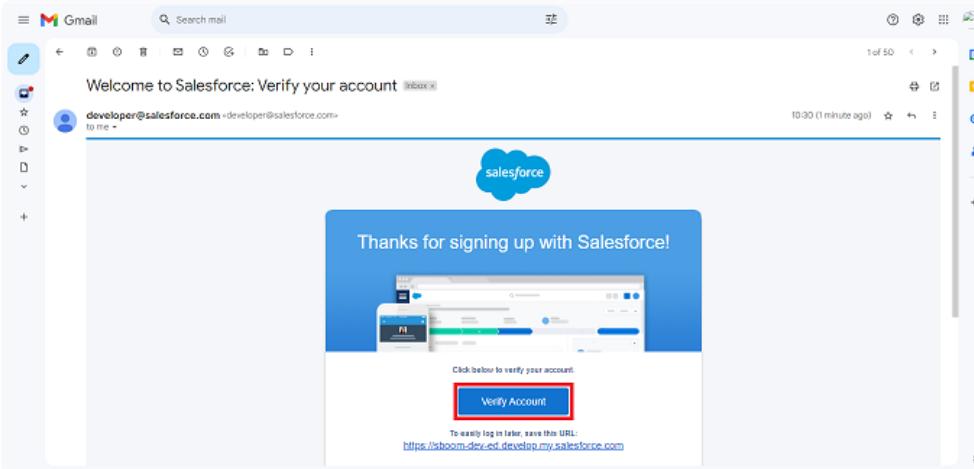
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

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

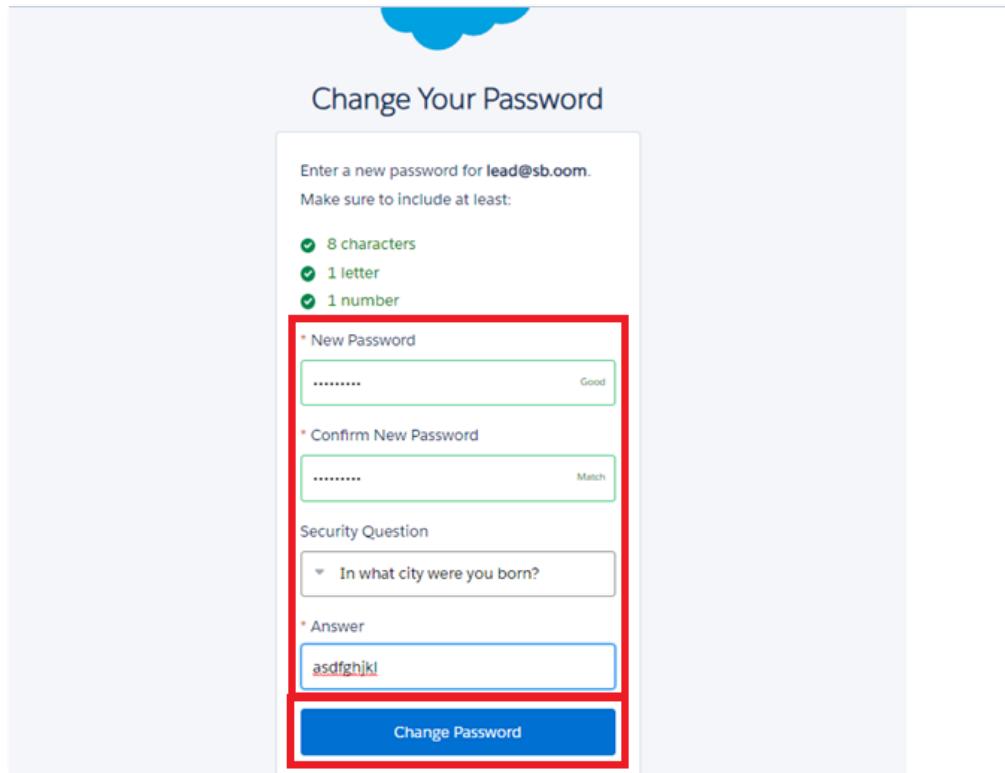
Click on sign me up after filling these.

1.2 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.

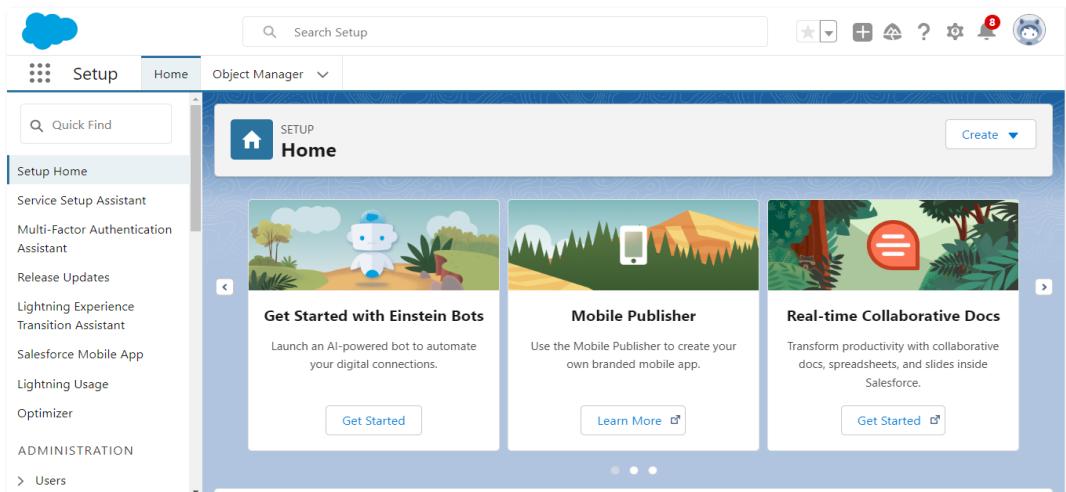


2. Click on Verify Account
3. Give a password and answer a security question and click on change password.



The screenshot shows the 'Change Your Password' page in Salesforce. At the top, it says 'Change Your Password'. Below that, it asks to enter a new password for 'lead@sb.oom' and lists requirements: '8 characters', '1 letter', and '1 number'. A red box highlights the password fields: 'New Password' (containing '.....') and 'Confirm New Password' (containing '.....'). Below these are 'Security Question' ('In what city were you born?') and 'Answer' ('asdfghjkl'). A blue box highlights the 'Change Password' button at the bottom.

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



The screenshot shows the 'Setup Home' page in Salesforce. The left sidebar includes links for 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', and 'ADMINISTRATION' (with a 'Users' link). The main area displays three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Each card has a 'Get Started' or 'Learn More' button.

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.

2.1 Create Supplier Object

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

Navigate to Setup Page:

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

Create a Custom Object:

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

Define the Custom Object:

- Enter the Label Name: Supplier.
- Enter the Plural Label Name: Suppliers.
- Enter the Record Name Label and Format:

- Record Name: Supplier Name
- Data Type: Text

Set Additional Options:

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

Save the Custom Object:

- Click on Save.+

supplier

Details

Description

API Name: supplier__c

Custom: ✓

Singular Label: supplier

Plural Label: suppliers

Enable Reports: ✓

Track Activities: ✓

Track Field History: ✓

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

2.2 Create Rice mill Object

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

Navigate to Setup Page:

- Click on the gear icon.

- Click on Setup.

Create a Custom Object:

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

Define the Custom Object:

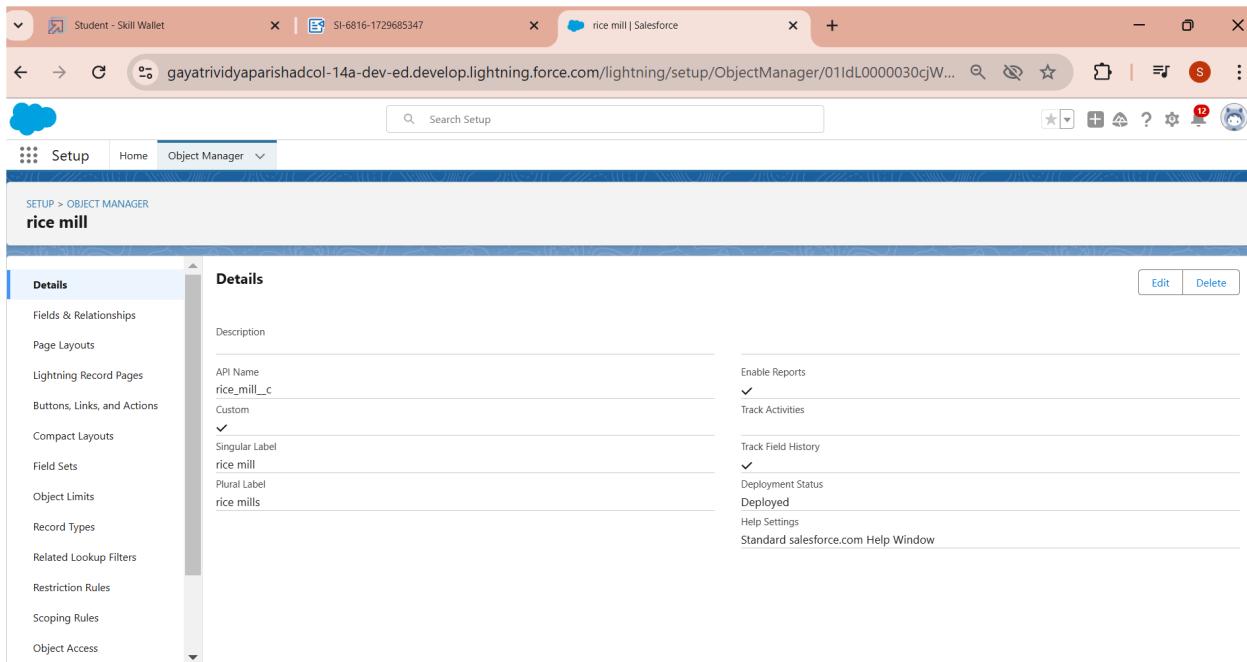
- Enter the Label Name: Rice Mill.
- Enter the Plural Label Name: Rice Mills.
- Enter the Record Name Label and Format:
- Record Name: Leave it blank.
- Data Type: Auto Number
- Display Format: rice-{000}
- Starting Number: 1

Set Additional Options:

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

Save the Custom Object:

- Click on Save.



2.3 Create consumer Objects

To create a Consumer object in Salesforce, follow the same steps as mentioned in Activity 2 for creating the Rice Mill object. Use the following details for the Consumer object:

Navigate to Setup Page:

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

Create a Custom Object:

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

Define the Custom Object:

- Enter the Label Name: Consumer.
- Enter the Plural Label Name: Consumers.
- Enter the Record Name Label and Format:
- Record Name: Leave it blank.

- Data Type: Auto Number
- Display Format: consumers-(000)
- Starting Number: 1

Set Additional Options:

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

Save the Custom Object:

- Click on Save.

The screenshot shows the Salesforce Setup interface for managing custom objects. The URL in the browser is <https://gayatrividyaparishadcol-14a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01dL0000030f6H...>. The page title is "consumer | Salesforce". The main content area is titled "SETUP > OBJECT MANAGER" and shows the "consumer" object. On the left, there's a sidebar with links like "Fields & Relationships", "Page Layouts", "Lightning Record Pages", etc. The "Details" tab is active, showing the following configuration details:

Field	Value
Description	
API Name	consumer__c
Custom	✓
Singular Label	consumer
Plural Label	consumers

On the right, under "Additional Options", the following checkboxes are checked:

Option	Status
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the bottom right of the main area are "Edit" and "Delete" buttons.

2.4 Create rice details Objects

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

Navigate to Setup Page:

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

Create a Custom Object:

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

Define the Custom Object:

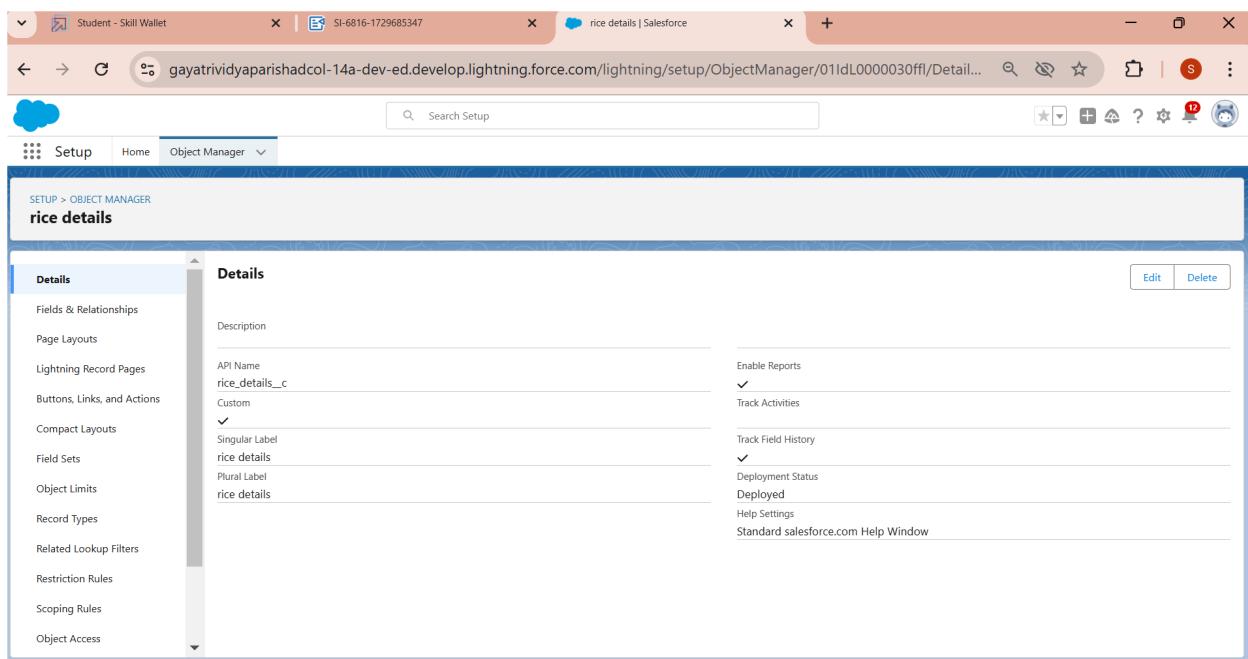
- Enter the Label Name: Rice Details.
- Enter the Plural Label Name: Rice Details.
- Enter the Record Name Label and Format:
- Record Name: Leave it blank.
- Data Type: Auto Number
- Display Format: rice-{000}
- Starting Number: 1

Set Additional Options:

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

Save the Custom Object:

- Click on Save.



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:

Custom Tabs

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

Web Tabs

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

Visualforce Tabs

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

Lightning Component Tabs

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

Lightning Page Tabs

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

3.1. Creating a Custom Tab

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

Navigate to Setup Page:

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

Create a New Custom Object Tab:

- Click on New under the Custom Object Tabs section.

Select Object and Tab Style:

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

Add to Profiles Page:

- Keep it as default. Click on Next.

Add to Custom App:

- Uncheck the Include Tab checkbox.

Append Tab to Users' Existing Personal Customizations:

- Ensure that the Append tab to users' existing personal customizations option is checked.
- Save the Custom Tab:
- Click on Save.

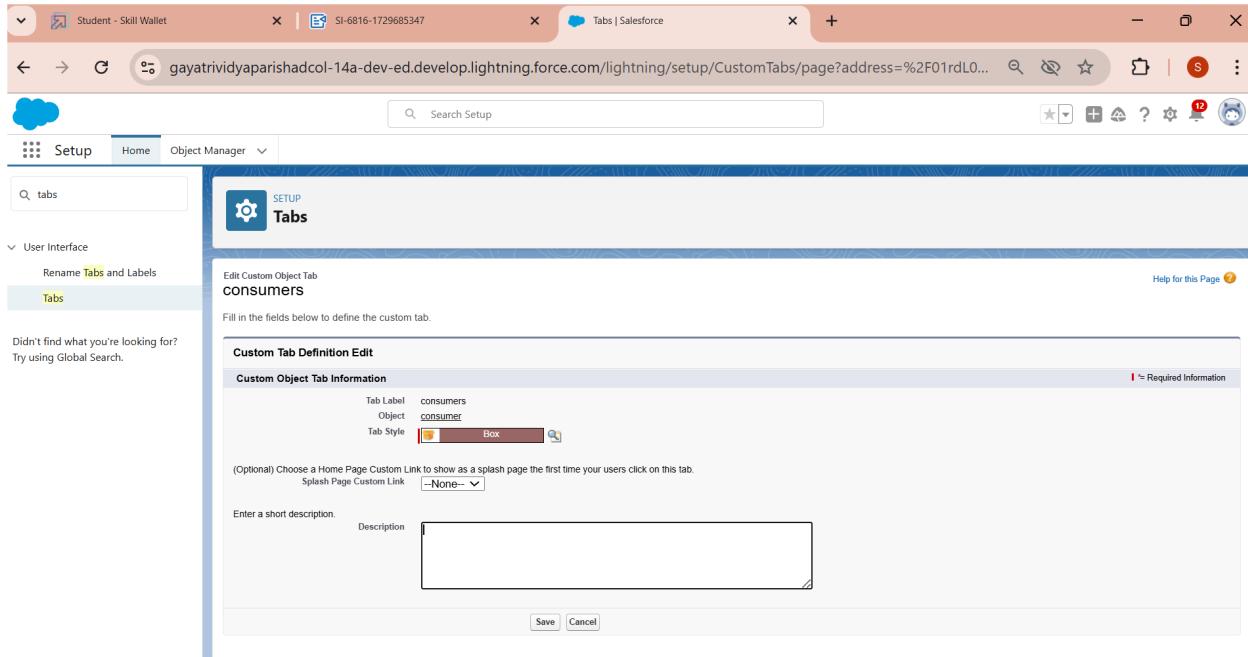
Action	Label	Tab Style	Description
Edit Del	consumers	Box	
Edit Del	rice details	Bottle	
Edit Del	rice mills	Box	
Edit Del	suppliers	Box	

Web Tabs
No Web Tabs have been defined

Visualforce Tabs
No Visualforce Tabs have been defined

3.2 Creating Remaining Tabs

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



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.

4.1 Create a Lightning App

To create a Lightning app page, follow these steps:

Navigate to App Manager:

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

Fill in App Details:

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

App Options Page:

- Keep the settings as default.
- Click Next.

Utility Items Page:

- Keep the settings as default.
- Click Next.

Upload a Photo:

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

Add Navigation Items:

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

Add User Profiles:

- Search for profiles (System Administrator) in the search bar.
- Click on the arrow button to add the profile.
- Click Save & Finish.

The screenshot shows the 'Lightning Experience App Manager' page. The left sidebar has a 'Setup' tab selected, with sections for Data, Apps, Connected Apps, External Client Apps, and Lightning Bolt. The main area displays a table titled '24 items • Sorted by App Name • Filtered by All appmenurelms - TabSet Type, App Type'. The table columns are: App Name, Developer Name, Description, Last Modified Date, App Type, and Visib...'. The table lists various Salesforce apps like All Tabs, Analytics Studio, App Launcher, Automation, Bolt Solution, Business Rules Engine, Community, Content, Data Manager, Digital Experiences, Lightning Usage App, Marketing CRM Classic, and MY RICE. The 'MY RICE' row is highlighted in red.

App Name	Developer Name	Description	Last Modified Date	App Type	Visib...
All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	28/10/2024, 6:45 pm	Classic	✓
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	28/10/2024, 6:45 pm	Classic	✓
App Launcher	AppLauncher	App Launcher tabs	28/10/2024, 6:45 pm	Classic	✓
Automation	FlowsApp	Automate business processes and repetitive tasks.	28/10/2024, 6:49 pm	Lightning	✓
Bolt Solution	LightningBolt	Discover and manage business solutions designed for your industry.	28/10/2024, 6:45 pm	Lightning	✓
Business Rules Engine	ExpressionSetConsole	Create and maintain business rules that perform complex lookups and calculations.	28/10/2024, 6:49 pm	Lightning	✓
Community	Community	Salesforce CRM Communities	28/10/2024, 6:45 pm	Classic	✓
Content	Content	Salesforce CRM Content	28/10/2024, 6:45 pm	Classic	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	28/10/2024, 6:45 pm	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	28/10/2024, 6:45 pm	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	28/10/2024, 6:45 pm	Lightning	✓
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	28/10/2024, 6:45 pm	Classic	✓
M MY RICE	MY_RICE		28/10/2024, 9:38 pm	Lightning	✓

Student - Skill Wallet

SI-6816-1729685347

App Manager | Salesforce

gayatrividyaparishadcol-14a-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

New Lightning App

App Details & Branding

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

App Details

- * App Name
- * 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

Next

Student - Skill Wallet

SI-6816-1729685347

App Manager | Salesforce

gayatrividyaparishadcol-14a-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

New Lightning App

Navigation Items

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

Available Items

- Accounts
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories

Selected Items

No items selected

Next

← → ⌂ gayatrividyaparishadcol-14a-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Setup Home Object Manager

Search Setup

Lightning Experience App Manager

24 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

App Name	Developer Name	Description	Last Modified Date	App Type	Visibilities
9 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	28/10/2024, 6:45 pm	Lightning	✓
10 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	28/10/2024, 6:45 pm	Lightning	✓
11 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	28/10/2024, 6:45 pm	Lightning	✓
12 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	28/10/2024, 6:45 pm	Classic	✓
13 MY RICE	MY_RICE	MY_RICE	28/10/2024, 9:38 pm	Lightning	✓
14 Platform	Platform	The fundamental Lightning Platform	28/10/2024, 6:45 pm	Classic	✓
15 Queue Management	QueueManagement	Create and manage queues for your business.	28/10/2024, 6:45 pm	Lightning	✓
16 Sales	Sales	The world's most popular sales force automation (SFA) solution	28/10/2024, 6:45 pm	Classic	✓
17 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	28/10/2024, 6:45 pm	Lightning	✓
18 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	28/10/2024, 6:45 pm	Lightning	✓
19 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	28/10/2024, 6:45 pm	Classic	✓
20 Salesforce Scheduler S...	LightningScheduler	Set up personalized appointment scheduling.	28/10/2024, 6:47 pm	Lightning	✓
21 Service	Service	Manage customer service with accounts, contacts, cases, and more	28/10/2024, 6:45 pm	Classic	✓
22 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across custo	28/10/2024, 6:45 pm	Lightning	✓

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,

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

Custom Fields:

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

5.1 Creating the number field in rice details object

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

Navigate to Object Manager:

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

Edit the Rice Details Object:

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

Create a New Field:

- Click on Fields & Relationships.
- Click on New

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Student - Skill Wallet', 'SI-6816-1729685347', and 'rice mill | Salesforce'. Below the navigation is a search bar labeled 'Search Setup'. The main area displays the 'rice mill' object details. On the left, a sidebar lists various setup categories: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, and Scoping Rules. The right side shows the 'Details' tab for the 'rice mill' object. It contains fields for Description (API Name: rice_mill__c, Custom checked, Singular Label: rice mill, Plural Label: rice mills), Enable Reports (checked), Track Activities, Track Field History (checked), Deployment Status (Deployed), Help Settings, and a link to the Standard salesforce.com Help Window. At the bottom right of the details panel are 'Edit' and 'Delete' buttons.

5.1 Creating Junction Object

This screenshot is identical to the one above, showing the 'rice mill' object details in the Salesforce Object Manager. The left sidebar shows the same list of setup categories. The right side displays the 'Details' tab for the 'rice mill' object, including the API Name (rice_mill__c), Custom field (checked), Singular Label (rice mill), Plural Label (rice mills), and other configuration options like Enable Reports, Track Activities, and Deployment Status (Deployed). The 'Edit' and 'Delete' buttons are visible at the bottom right of the details panel.

5.2 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

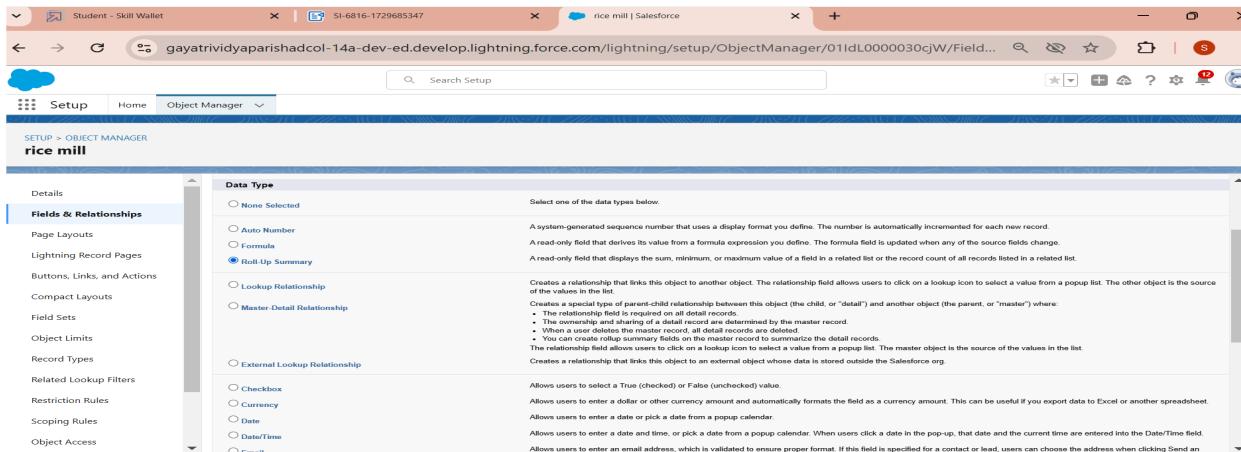
1. Go to the setup page >> click on object manager >> From drop down click edit for consumer object.
2. Click on fields & relationship >> click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. Select the related object “rice mill”.
5. Give Field Label as “rice mill name”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

5.3 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 page for the 'rice mill' object. On the left, there's a sidebar with various setup options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main area is titled 'Fields & Relationships' and lists seven items. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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

5.4 Creating the Roll-up Summary

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

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

To create a Roll-up Summary field:

Navigate to Object Manager:

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

Create a New Field:

- Click on Fields & Relationships
- Click on New.

Select Data Type:

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

Define Field Properties for Supplier:

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

Configure Roll-up Summary for Supplier:

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

The screenshot shows the Salesforce Object Manager interface. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area shows a custom field for the 'supplier' object named 'sum of rice distributed'. The 'Field Information' section displays the field label ('sum of rice distributed'), field name ('sum_of_rice_distributed'), API name ('sum_of_rice_distributed_c'), and other details. The 'Roll-Up Summary Options' section shows the data type as 'Roll-Up Summary', summarized object as 'rice_details', field to aggregate as 'rice_details:rice_distributed', and summary type as 'SUM'. The page includes standard Salesforce navigation and search tools at the top.

Repeat Steps for Rice Mill Object:

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

Configure Roll-up Summary for Rice Mill:

- Select the summarized object as Rice Details.
- Select the roll-up type as SUM.

- Select the field to aggregate as Rice Distributed.
- Click Next.
- Click Next again.
- Click Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The main title is 'rice mill'. On the left, a sidebar lists various setup categories like 'Page Layouts', 'Lightning Record Pages', etc. The central area displays the 'rice mill Custom Field' named 'rice distributed to shops'. The 'Custom Field Definition Detail' section shows the field's properties: Field Label ('rice distributed to shops'), Field Name ('rice_distributed_to_shops'), API Name ('rice_distributed_to_shops_c'), and Object Name ('rice_mill'). It also shows the field was created by 'Sam Srivani' on 28/10/2024, 10:30 pm, and modified by the same user on the same date. Under 'Roll-Up Summary Options', the data type is set to 'Roll-Up Summary' with 'rice details' as the summarized object and 'rice details: rice distributed' as the field to aggregate. A 'Help for this Page' link is visible in the top right corner.

5.5 Creating Fields in Objects

Navigate to Setup:

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

Edit Rice Details Object:

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

Create New Field:

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

Select Data Type:

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

Define Field Properties:

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

Proceed with Creation:

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

The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Student - Skill Wallet, SI-6816-172965347, rice details | Salesforce
- Search Bar:** Search Setup
- Navigation:** Setup, Home, Object Manager
- Current Path:** SETUP > OBJECT MANAGER, rice details
- Custom Field Definition Detail:**
 - Label:** supplier Name
 - Object Name:** rice_details
 - Data Type:** Master-Detail
 - Description:** Help Text
 - Created By:** Sam Sriyani, 28/10/2024, 9:47 pm
 - Modified By:** Sam Sriyani, 28/10/2024, 9:47 pm
- Master-Detail Options:**
 - Related To:** supplier
 - Related List Label:** rice details
 - Sharing Setting:** Read/Write. Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
 - Reparentable Master Detail:**

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. Under 'rice details', the 'Fields & Relationships' tab is active. The table lists the following fields:

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)		

5.6 Creating Fields in rice mill Objects

Navigate to Setup:

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

Edit Rice Mills Object:

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

Create New Field:

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

Select Data Type:

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

The screenshot shows the Salesforce setup interface. The top navigation bar includes tabs for 'Student - Skill Wallet', 'SI-6816-1729685347', and 'rice mill | Salesforce'. The main title is 'SETUP > OBJECT MANAGER' followed by 'rice mill'. A sub-header indicates this is a 'rice mill Custom Field' for the 'rice price kg' field. The left sidebar lists various setup categories like 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', etc. The right pane displays the 'Custom Field Definition Detail' for 'rice price kg'. Key details shown include:

Field Information	Value
Field Label	rice price kg
Field Name	rice_price_kg
API Name	rice_price_kg_c
Description	(empty)
Help Text	(empty)
Data Owner	(empty)
Field Usage	(empty)
Data Sensitivity Level	(empty)
Compliance Categorization	(empty)
Created By	Sam Srivani, 28/10/2024, 10:54 pm
Modified By	Sam Srivani, 28/10/2024, 10:54 pm
General Options	Value
Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
AI Prediction	<input type="checkbox"/>
Default Value	(empty)

5.7 Creating Fields in consumer Objects

Navigate to Setup:

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

Edit Consumer Object:

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

Create New Field For First Name:

Create New Field For Last Name:

Create New Field For Email:

Create New Field For Rice Taken By Shops:

Create New Field For Rice Type:

Create New Field For Phone Number

Phone number

Create New Field For Mode Of Payment

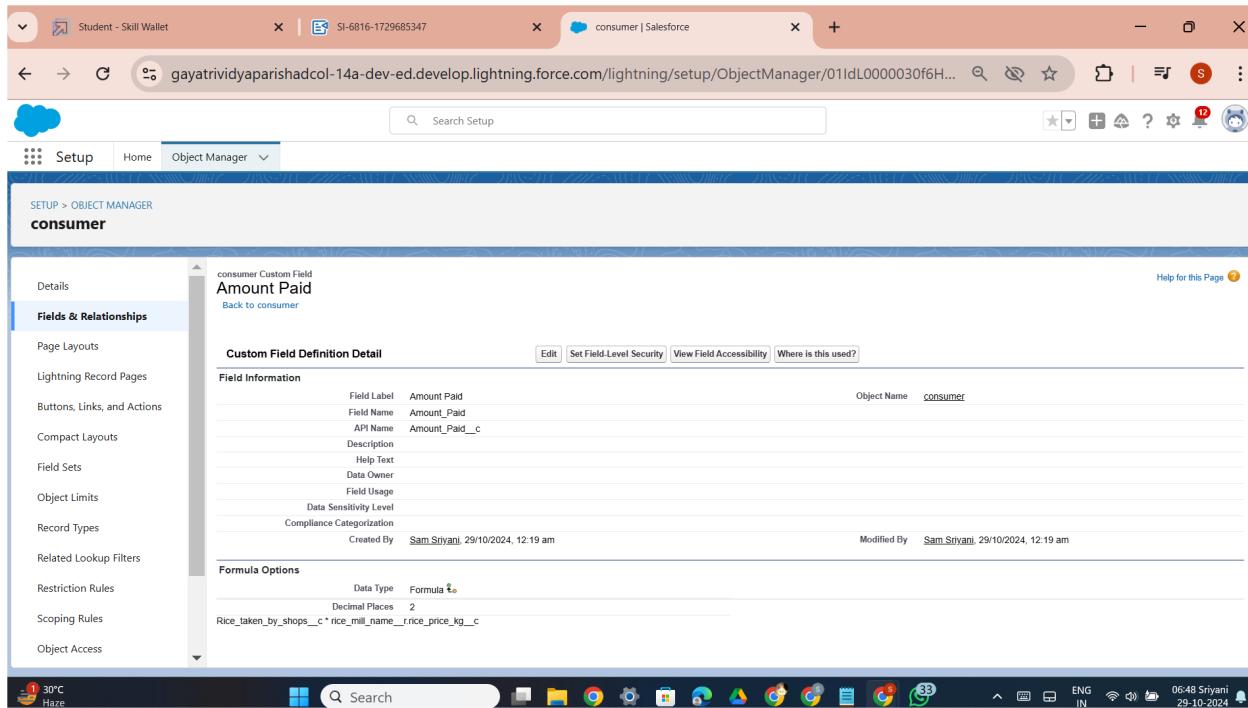
The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A search bar at the top right contains the query 'consumer | Salesforce'. The main area displays the 'Fields & Relationships' section for the 'consumer' object. A table lists various fields with their details. A new row is being added, indicated by a 'New' button in the header. The new field is labeled 'Mode of payment' and has a field name of 'Mode_of_payment__c'. The data type is 'Picklist'. The 'Controlling Field' dropdown is set to 'rice_type__c'. The 'Indexed' checkbox is checked.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid__c	Formula (Number)		
Consumer Name	Consumer_Name__c	Formula (Text)		
consumer Name	Name	Auto Number		
Created By	CreatedById	Lookup(User)		
email	email__c	Email		
First name	First_name__c	Text(20)		
Last Modified By	LastModifiedById	Lookup(User)		
Last name	Last_name__c	Text(20)		
Mode of payment	Mode_of_payment__c	Picklist		
phone number	Phone_number__c	Phone		
rice mill name	rice_mill_name__c	Master-Detail(rice mill)		
Rice taken by shops	Rice_taken_by_shops__c	Number(5, 0)		
rice taken by shops in kgs	rice_taken_by_shops_in_kgs__c	Number(5, 0)		
Rice type	Rice_type__c	Picklist		

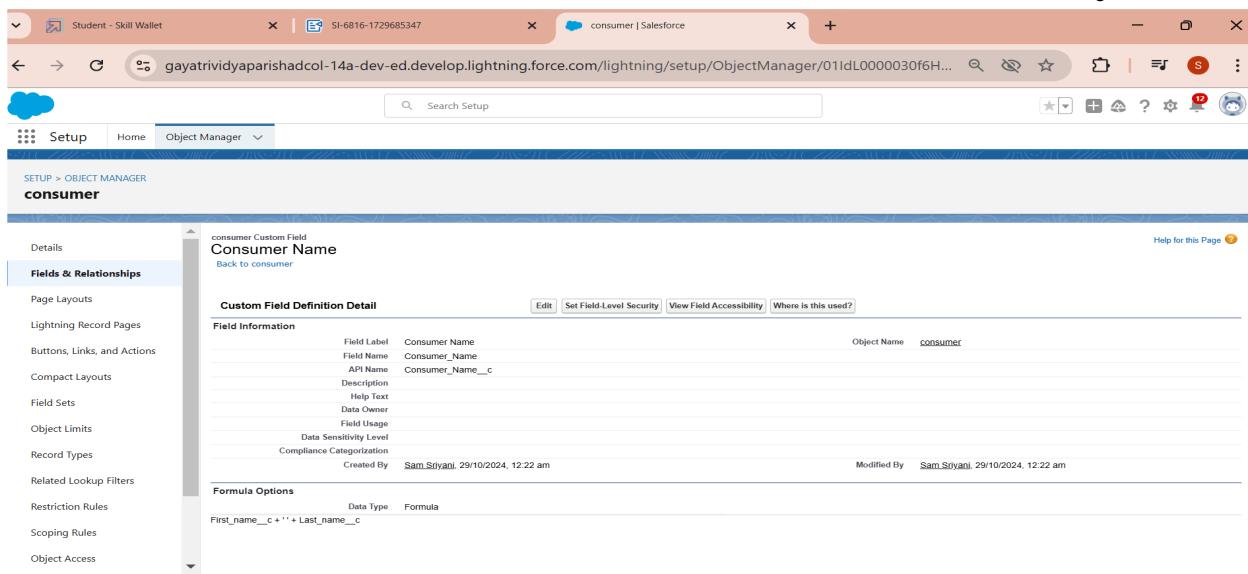
5.8 Creating Cross Object Formula Field in consumer object

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.

- Go to setup click on Object Manager type object name (consumer) in the search bar Click on Fields & Relationships click on New.
- Select Data type as "Formula" and click Next.
- Give Field Label and Field Name as "Amount Paid" and select formula return type as "Number" Formula :
rice_taken_by_shops_crice_mill_name_r.rice_price_kg_c



- Give Field Label and Field Name as "Amount Paid" and select formula return type as "Number" and Next.
- Go to setup click on Object Manager type object name (consumer) in the search bar
- Click on Fields & Relationships click on New.
- Select Data type as "Formula", click Next.
- Give Field Label and Field Name as 'Consumer Name' and select formula return type as "TEXT", click Next.
- Insert field formula should be: First Name c++ Last Namec Check For syntax.

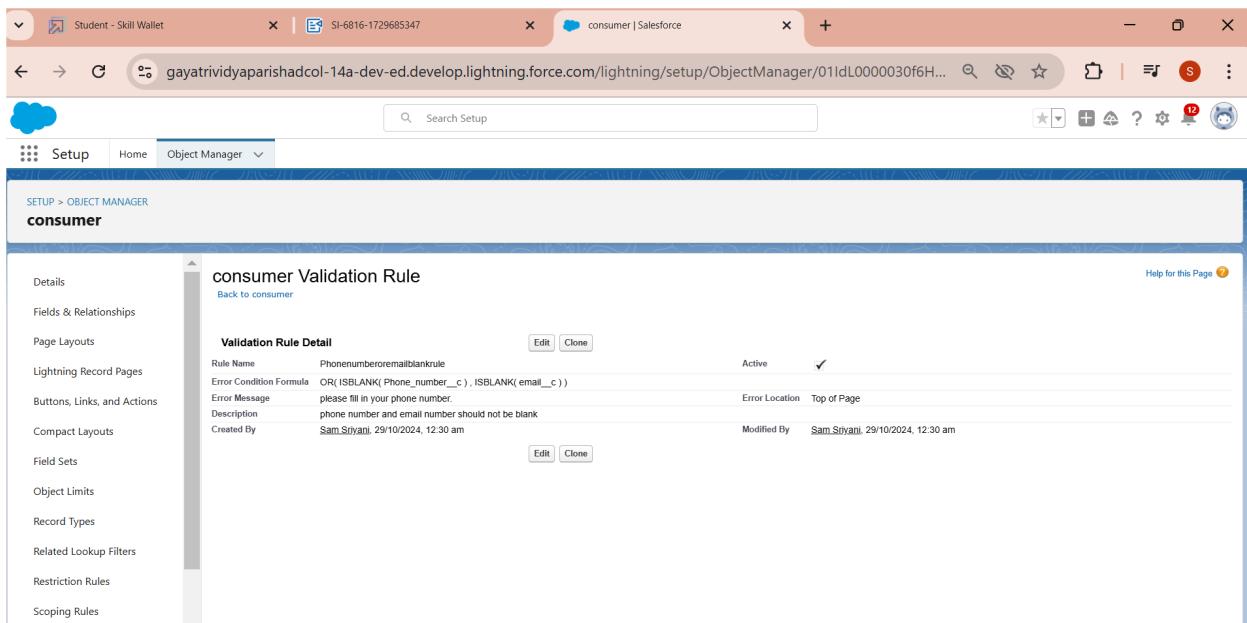


5.9 Creating the validation rule

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

- Go to the setup page click on Object Manager from the dropdown click edit for the consumer object.
- Click on Validation Rules click New
- Enter the Rule Name as 'Phonenumberoremailblankrule'.
- Enter the Description as 'Phone number and email should not be blank'.
- Check the syntax.
- Enter the formula as: OR(ISBLANK(phone_number_c), ISBLANK(email_c)). Under the Error Message, Write 'Please fill in your Phone Number'.
- Save Validation rule..



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.

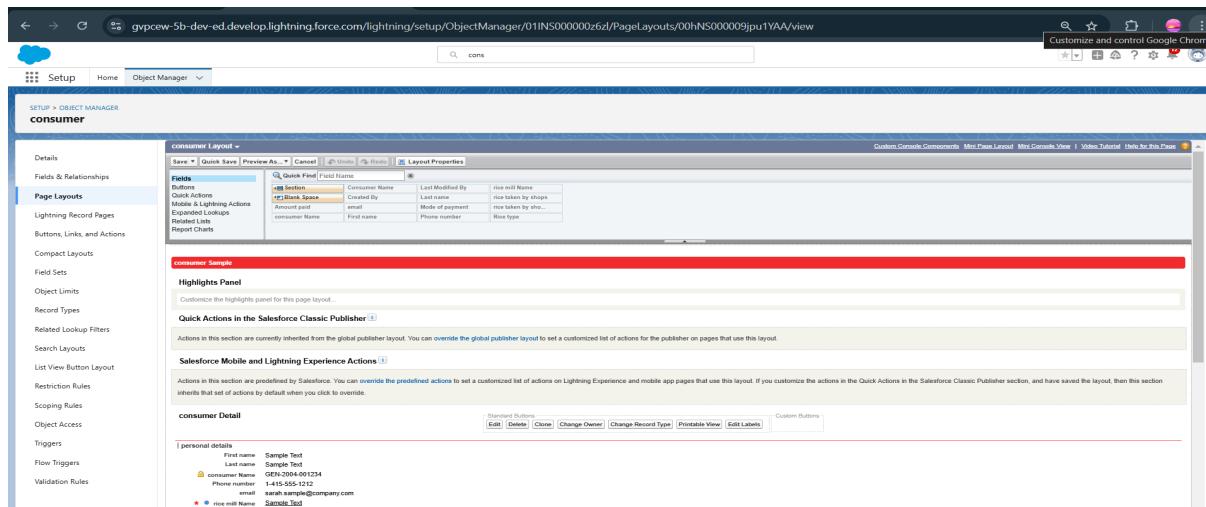
Activity 1: Creating the Page Layout

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

Section: "Rice Details" Fields: Rice Taken by Shop, Rice Type

Section: "Receipt Details" Fields: Mode of Payment, Amount Paid

- h. Click Save



gpcew-5b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01INS000000z6zl/PageLayouts/view

The screenshot shows the Salesforce Object Manager interface for the 'consumer' object. The top navigation bar includes links for Setup, Home, and Object Manager, along with a search bar containing the text 'cons'. Below the header, the breadcrumb path 'SETUP > OBJECT MANAGER' and the object name 'consumer' are displayed. The main content area is titled 'Page Layouts' and shows a single item: 'consumer Layout'. This layout is listed under the 'Page Layout Name' column. To the right of the layout, details are shown under 'CREATED BY' and 'MODIFIED BY', both listing 'GNANALEKHA DARLAPOODI'. A timestamp for creation is '24/10/2024, 2:34 pm' and for modification is '25/10/2024, 10:43 am'. A 'Quick Find' search bar and a 'New' button are located at the top right of the list table.

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.

Types of Profiles in Salesforce

1. Standard Profiles

By default, Salesforce provides the following standard profiles:

Contract Manager

Read Only

Marketing User

Solutions Manager

Standard User

System Administrator

2. Custom Profiles

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

with that particular profile.

Activity 1: Owner Profile

To create a new profile:

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

The screenshot shows the Salesforce Setup interface with the following details:

- Profile Detail:** Name: owner, User License: Salesforce, Description: Created By: Sam Sriyan, Created Date: 28/10/2024, 6:45 pm, Modified By: Sam Sriyan, Modified Date: 29/10/2024, 1:17 am.
- Page Layouts:** Standard Object Layouts for Global, Email Application, Home Page Layout, Account, Invoice, Invoice Line, Lead, Legal Entity, and Location.
- Custom Object Permissions:** A table showing permissions for consumers, rice details, rice mills, and suppliers across Basic Access (Read, Create, Edit, Delete) and Data Administration (View All, Modify All). For example, consumers have Read, Create, Edit, Delete, View All, and Modify All permissions for all objects.

Activity 2: Employer Profile

To create a new profile:

- Go to Setup type 'Profiles' in the quick find box → click on Profiles → clone the desired profile (Standard Platform User) → enter profile name (Employer) → Save.

- b. While still on the profile page, click Edit.
- c. Select the Custom App settings as default for the rice mill.
- d. 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.
- e. Click Save.

The screenshot shows the Salesforce Setup interface with the following details:

- Profile Detail:** Name: employer, User License: Salesforce, Description: Not Assigned, Created By: Sam.Sriyani, 28/10/2024, 6:45 pm, Modified By: Sam.Sriyani, 29/10/2024, 1:23 am.
- Page Layouts:** Standard Object Layouts table showing assignments for Global, Email Application, Home Page Layout, Account, and Alternative Payment Method.
- Custom Object Permissions:** Two tables showing permissions for consumers, rice details, rice mills, and suppliers across Basic Access and Data Administration categories.

Object	Basic Access						Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
consumers	✓	□	□	□	□	□	rice mills	✓	□	□	□	□
rice details	✓	□	□	□	□	□	suppliers	✓	□	✓	□	□

Activity 3: Workers Profile

To create a new profile:

- a. Go to Setup type 'Profiles' in the quick find box → click on Profiles → clone the desired profile (Standard Platform User) → enter profile name (Workers) → Save.
- b. While still on the profile page, click Edit.

- c. Select the Custom App settings as default for the rice mill.
- d. 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.
- e. Click Save.

The screenshot shows the Salesforce Setup interface with the following details:

- Profile:** Worker
- Profile Detail:**
 - Name: Worker
 - User License: Salesforce
 - Description:
 - Created By: Sam Snyani | 28/10/2024, 6:45 pm
 - Modified By: Sam Snyani | 29/10/2024, 1:26 am
- Page Layouts:**

Object	Layout Type	Assignment
Global	Global Layout	[View Assignment]
Email Application	Not Assigned	[View Assignment]
Home Page Layout	DE Default	[View Assignment]
Account	Account (Support) Layout	[View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]
		Invoice Layout [View Assignment]
		Invoice Line Layout [View Assignment]
		Lead Layout [View Assignment]
		Legal Entity Layout [View Assignment]
		Location Layout [View Assignment]
- Custom Object Permissions:**

Object	Basic Access						Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		
consumers	✓	✓	□	□	□	□		
rice details	✓	✓	□	□	□	□		
rice mills	✓	□	□	□	□	□		
suppliers	✓	□	□	□	□	□		

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

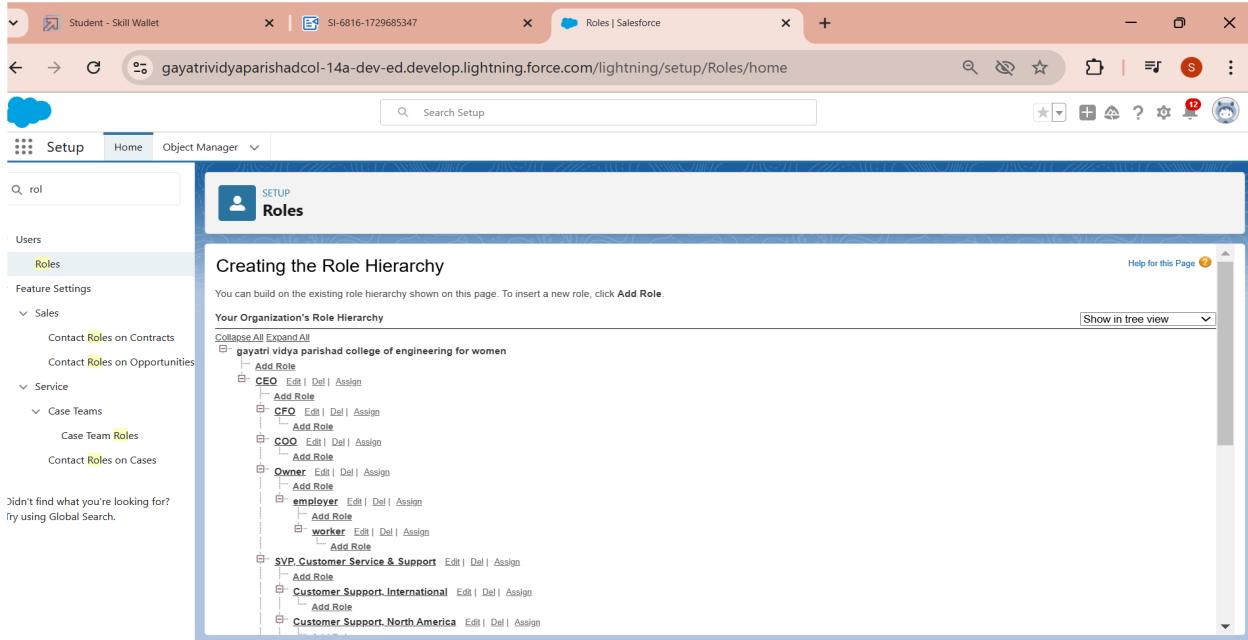
Creating Owner Role:

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

Activity 2: Creating Employer Roles

Creating Another Two Roles Under Manager:

- e. Go to Quick Find search for Roles click on Set Up Roles.
- f. Click the plus on CEO role, and click Add Role under Owner.
- g. Give Label as "Employer" and Role Name gets auto-populated. Then click on Save.
- h. Repeat the same steps for another role.
- i. Click the plus on CEO role, and click the plus on Owner, and click Add Role under Employer.
- j. Give Label as "Worker" and Role Name gets auto-populated. Then click on Save.



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.

9.1 Create User

- a. Go to Setup type 'Users' in the quick find box → select Users click New User.
- b. Fill in the fields:
 - a. First Name: Vicky
 - b. Last Name: Y
 - c. Alias: Vy
 - d. Email ID: 21jg1a1251.sriyani@gvpcew.ac.in

- e. Username: 21jg1a1251@gvpcew.ac.in
- f. Nickname: Vicky
- g. Role: Owner
- h. User License: Salesforce
- i. Profile: Owner
- j. Save it.

The screenshot shows the Salesforce Setup interface with the following details:

- User Detail:**
 - Name: vicky y
 - Alias: v y
 - Email: 21jg1a1251.sriyani@gvpcew.ac.in (Verified)
 - Username: 21jg1a1251@gvpcew.ac.in
 - Nickname: User17301460189418039935
 - Title:
 - Company:
 - Department:
 - Division:
 - Address:
 - Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
 - Locale: English (India)
 - Language: English
 - Delegated Approver: Manager
 - Receive Approval Request Emails: Only if I am an approver
 - Federation ID:
- Role:** Owner
- User License Profile:** Salesforce owner
- Status:** Active
- Other Roles:** Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations (View), Data.com User Type (View), Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts

9.2 Creating another users

1. Go to setup ? type users in quick find box ? select users ? click New user.
 - a. First Name: ram
 - b. Last Name: ram
 - c. Alias: rram
 - d. Email ID: 21jg1a1251.sriyani@gvpcew.ac.in
 - e. Username: [sriyani@gvpcew.ac.in](#)
 - f. Nickname: ram

g. Role: EmployerUser License: Salesforce Platform

h. Profile: Standard Platform User

i. Save it.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, there's a sidebar with various categories like Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, and Data. The main area is titled 'User Edit' for a user named 'ram'. The 'General Information' section contains fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Role' field is set to 'employer', 'User License' to 'Salesforce Platform', and 'Profile' to 'Standard Platform User'. There are also sections for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type (set to 'None'), Data.com Monthly Addition Limit (set to 300), and Accessibility Mode (Classic Only).

9.3 Create Another User

- a. Go to Setup type "Users" in the quick find box → select Users → click New User.
- b. Fill in the fields:
 - a. First Name: ragu
 - b. Last Name: raj
 - c. Alias: rraj
 - d. Email ID: 21jg1a125.sriyani@gvpcew.ac.in
 - e. Username: sriya@gvpcew.ac.in
 - f. Nickname: ragu
- g. Role: Worker
- h. User License: Salesforce Platform

i. Profile: Standard Platform User

j. Save it.

User Detail

Name	ragu raj	Role	worker
Alias	rraj	User License	Salesforce Platform
Email	21g1a1251.sriyani@vpcnew.ac.in [Verify]	Profile	Standard Platform User
Username	sriyag@vpcnew.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	User17301462699103683304	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	<input checked="" type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>

All Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dd00000etbm8ual.apy2cy1xp02r@chatter.salesforce.com	worker	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	srjyag	srjyag@vpcnew.ac.in		emloyer	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	ram	ram	sriyani@vpcnew.ac.in	emloyer	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	Sriyani Sam	SSriy	ssam@vpc.sandbox	System Administrator	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User Integration	Integ	integration@00dd00000etbm8ual.com	Analytics Cloud Integration User	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00dd00000etbm8ual.com	Owner	<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/> Edit	y.vicky	y.v	21g1a1251@vpcnew.ac.in	Owner	<input checked="" type="checkbox"/>	owner

10. Permission sets

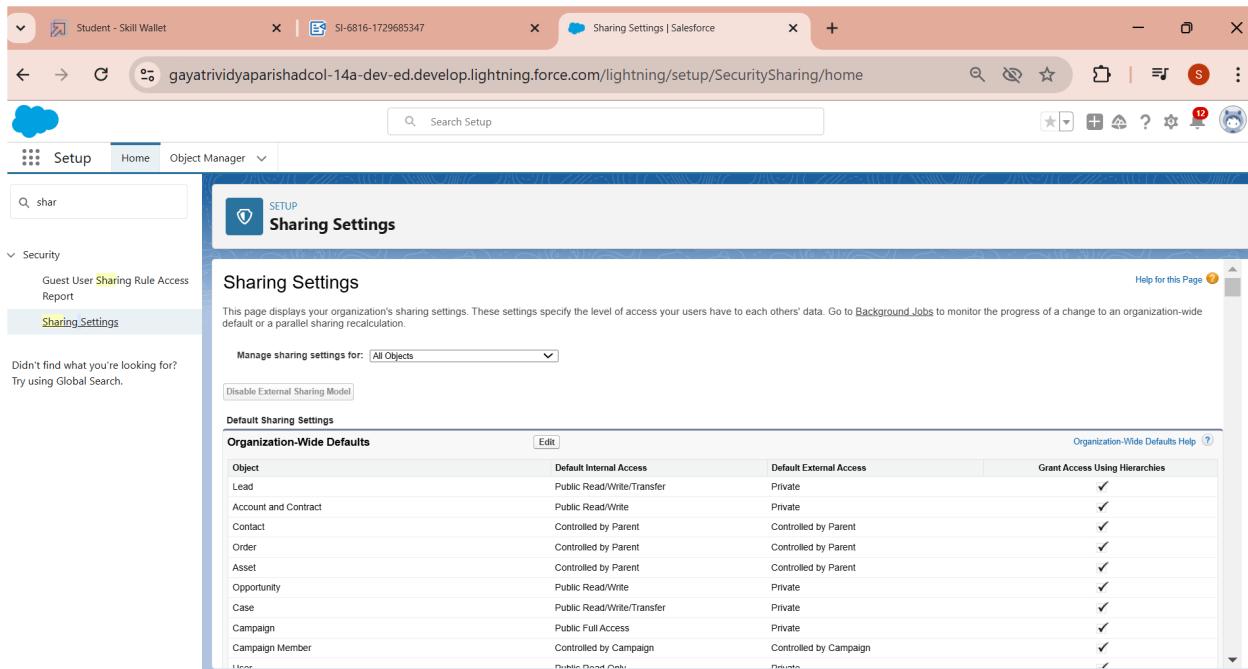
A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles and are the recommended way to manage your users' permissions.

Activity 1: Creating OWD Setting

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

Extra Information:

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



The screenshot shows the Salesforce Sharing Settings page. At the top, there's a navigation bar with tabs like 'Setup', 'Home', and 'Object Manager'. Below the navigation is a search bar labeled 'Search Setup'. The main content area is titled 'Sharing Settings' and contains a sub-section 'Sharing Settings'. It says, '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 recalculation.' There's a dropdown menu 'Manage sharing settings for: All Objects'. A button 'Disable External Sharing Model' is visible. Below this is a section 'Default Sharing Settings' with a table titled 'Organization-Wide Defaults'. The table has columns for 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. The table lists various objects like Lead, Account and Contract, Contact, Order, Asset, Opportunity, Case, Campaign, and Campaign Member, along with their respective sharing settings. A note at the bottom right of the table says 'Organization-Wide Defaults Help'.

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	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
Event	Public Read Only	Private	✓

11. Report

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

11.1 Create Report

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

The screenshot shows the Salesforce Lightning interface with the following details:

- Header:** Shows three tabs: "Student - Skill Wallet", "SI-6816-1729685347", and "All Reports | Reports | Salesforce".
- Page Title:** "gayatrividyaparishadcol-14a-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=everything"
- Page Header:** "MY RICE" with navigation links: suppliers, rice mills, consumers, rice details, Reports.
- Search Bar:** "Search..."
- Section Headers:** Reports, All Reports (31 items).
- Table Headers:** REPORTS, Report Name, Description, Folder, Created By, Created On, Subscribed.
- Table Data:** A list of reports including "Program Milestones", "Program Overview by User", "Program Overview by User" (selected), "Sample Flow Report: Screen Flows", "Sample Report: Orchestration Run Logs", and "Sample Report: Orchestration Runs".
- Actions:** "Search all reports...", "New Report", "New Folder", and other icons.

11.2 Sharing report to owner

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

The screenshot shows a Salesforce Lightning environment with three tabs open in the header: 'Student - Skill Wallet', 'SI-6816-1729685347', and 'range of amount per day | Salesforce'. The main content area displays a report titled 'Report: rice mills with consumers range of amount per day'. The report details are as follows:

Total Records	Total rice price/kg	Total Amount Paid
10	588	1,02,184.30

Below the report, there is a list of rice mills with their names and IDs:

- rice mill: rice mill Name [rice-004]
- Subtotal [rice-010]
- Subtotal [rice-001]
- Subtotal [rice-008]
- Subtotal [rice-002]
- Subtotal [rice-003]
- Subtotal [rice-007]
- Subtotal [consumers-005]

The 'Edit Subscription' dialog box is overlaid on the report. It contains the following settings:

- Frequency:** Daily (selected)
- Time:** 8:00 am
- Attachment:** Attach File
- Recipients:** Me (selected)
- Run Report As:** Me
- Unsubscribe** button
- Cancel** and **Save** buttons

11.3 create a report folder

Steps to Create a Report Folder:

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

Moving a Report to the New Folder:

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

e. Select the "Estimated Rice per Day" folder and click Select.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	range of amount per day		estimated rice per day	Sam Sriyani	29/10/2024, 1:21 pm	✓

Overall Reports(Range of amount per day)

Total Records	Total rice price kg	Total Amount Paid
10	588	1,02,184.30

Rice taken by shops	rice mill: rice mill Name	consumer: consumer Name	Rice type	rice price kg	Mode of payment	Amount Paid
3 (1)	rice-004	consumers-004	2 normal rice	25	UPI	75.00
6 (1)	rice-010	consumers-008	1 basmati	11	Cash	69.30
10 (1)	rice-001	consumers-001	1 basmati	5	Credit card	50.00
11 (1)	rice-008	consumers-007	2 normal rice	455	Credit card	5,005.00
15 (1)	rice-002	consumers-002	1 basmati	10	Cash	150.00
20 (1)	rice-003	consumers-003	2 normal rice	20	Credit card	400.00
22 (1)	rice-007	consumers-005	1 basmati	45	Cash	990.00

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.

12.1 Create Dashboard Folder

Steps to Create a Dashboard Folder:

- a. Click on the App Launcher and search for "Dashboard".
- b. Click on the Dashboard tab.
- c. Click New Folder.
- d. Give the Folder Label as "Amount Data Dashboard".
- e. Folder Unique Name will be auto-populated.

Click Save.

The screenshot shows a web browser window with three tabs open. The active tab is titled 'amount data dashboard | Salesforce'. The URL in the address bar is 'gayatrividyaparishadcol-14a-dev-ed.lightning.force.com/lightning/r/Folder/00IdL000007Od6jQAC/view?qu...'. The browser interface includes a search bar, a refresh button, and various icons for file operations like save and print.

The main content area displays a list of dashboards under the heading 'Dashboards'. A sidebar on the left lists categories: 'MY RICE' (with sub-options 'suppliers', 'rice mills', 'consumers', 'rice details'), 'range of amount per day', 'estimated data', and 'estimated data'. The 'estimated data' section is currently selected. The main table shows one item: 'estimated data' (Name), 'total amount of data in dashboard' (Description), 'amount data dashboard' (Folder), 'Sam Sriyani' (Created By), and '29/10/2024, 1:51 pm' (Created On). The table has columns for Name, Description, Folder, Created By, Created On, and Subscribed.

The sidebar also includes sections for 'All Folders > amount data dashboard' (1 item) and 'Folders' (with sub-options 'All Dashboards' and 'All Folders').

12.2 Create Dashboard

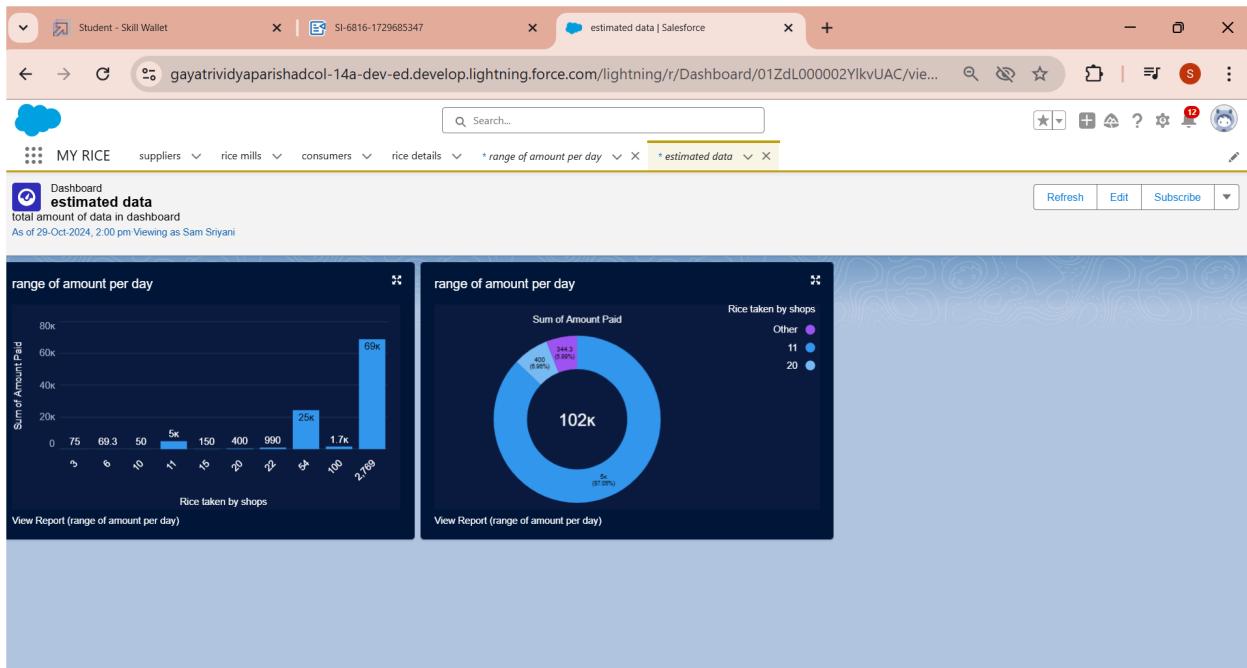
- a. Go to the App → click on the Dashboards tab.
- b. Give a Name and select the folder that was created, and click Create.
- c. Select Add Component.
- d. Select a Report and click Select.

First Component Details:

- e. Display as: Vertical Bar Chart
- f. X-axis: Rice Taken by Shops
- g. Y-axis: Sum of Amount
- h. Y-axis Range: Automatic
- i. Sort by: Rice Taken by Shops
- j. Component Theme: Dark

Second Component Details:

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



13. APEX

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

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

Creating Classes :

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

- Class:

As in Java, you can create classes in Apex. A class is a template or blueprint from

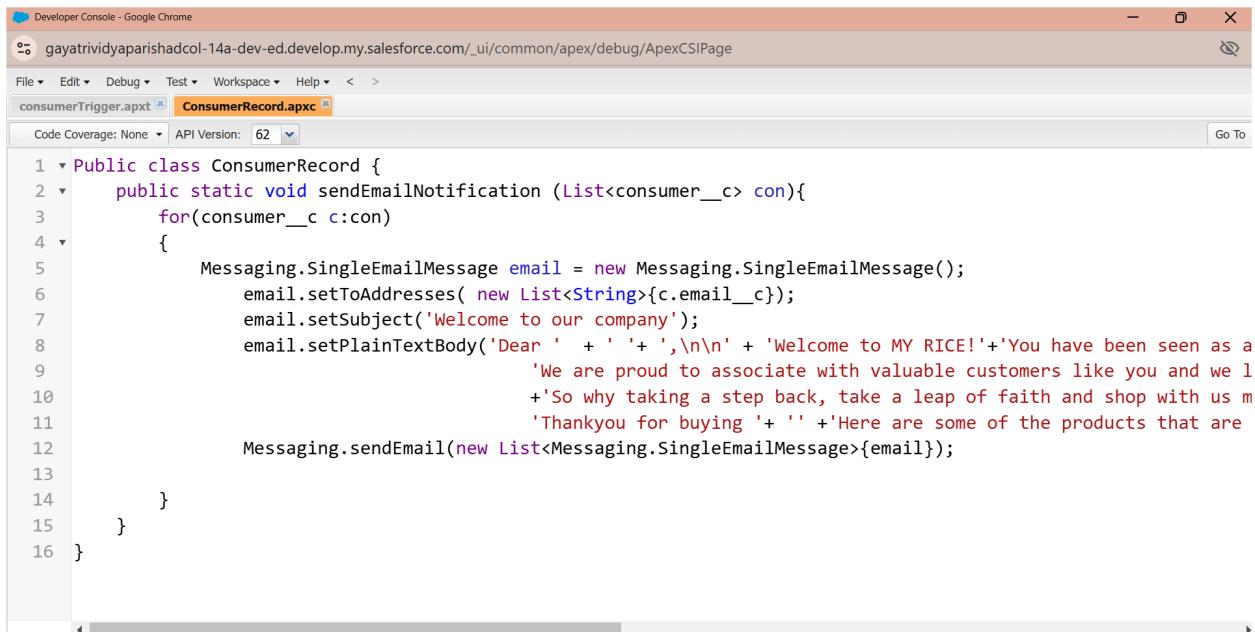
which objects are created. An object is an instance of a class.

- Object

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

13.1 Creating an Apex Class(ConsumerRecord)

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



```
Developer Console - Google Chrome
gayatrividya@parashadcol-14a-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
consumerTrigger.apxt ConsumerRecord.apxc
Code Coverage: None API Version: 62 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\n' + 'Welcome to MY RICE!'+ 'You have been seen as a
9                                         'We are proud to associate with valuable customers like you and we 1
10                                         +'So why taking a step back, take a leap of faith and shop with us m
11                                         'Thankyou for buying ' + '' + 'Here are some of the products that are
12             Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
13
14         }
15     }
16 }
```

13.2 Creating an Apex Trigger

How to create a new trigger :

- While still in the trailhead account, navigate to the gear icon in the top right corner.
- Click on developer console and you will be navigated to a new console window.
- Click on the File menu in the toolbar, and click on new? Trigger.
- Enter the trigger name and the object to be triggered.

Syntax For creating trigger :

The syntax for creating trigger is :

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

Developer Console - Google Chrome

gayatrividyaparishadcol-14a-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

consumerTrigger.apxt

Code Coverage: None ▾ API Version: 62 ▾ Go To

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

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time ▾	Status	Read	Size

Filter Click here to filter the log list