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 perday,how many were sold that rice and which type of rice all reports send to owners daily wise. It leverages thepower 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-richapplication 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 & soldeach 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:

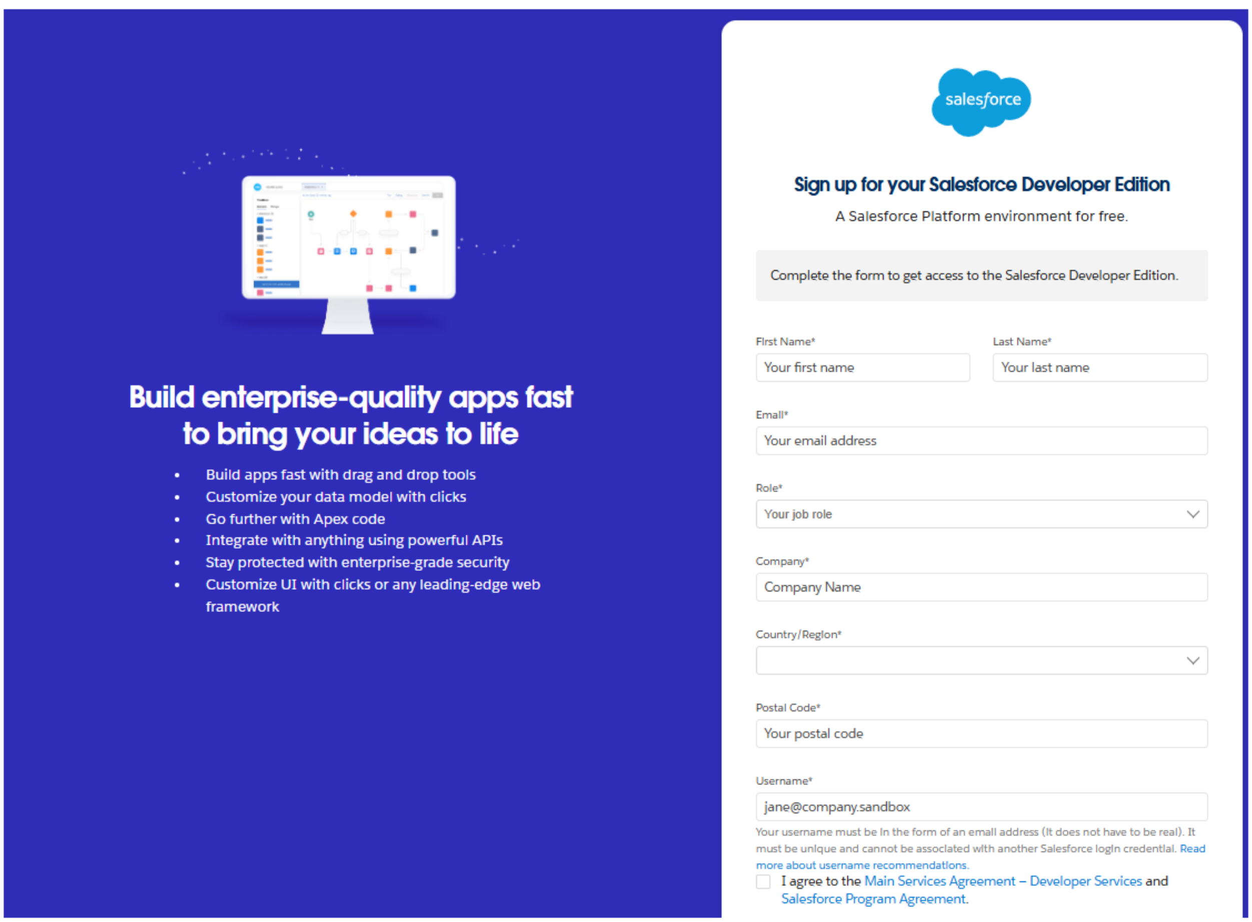
Organization Wide Defaults(OWD) in salesforce is the baseline level of access that the most restricted user should have. Organizational Wide Defaults are used to restrict access.But in our case we created roles and given the roles in such a way that the owner can see employer and worker records , and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



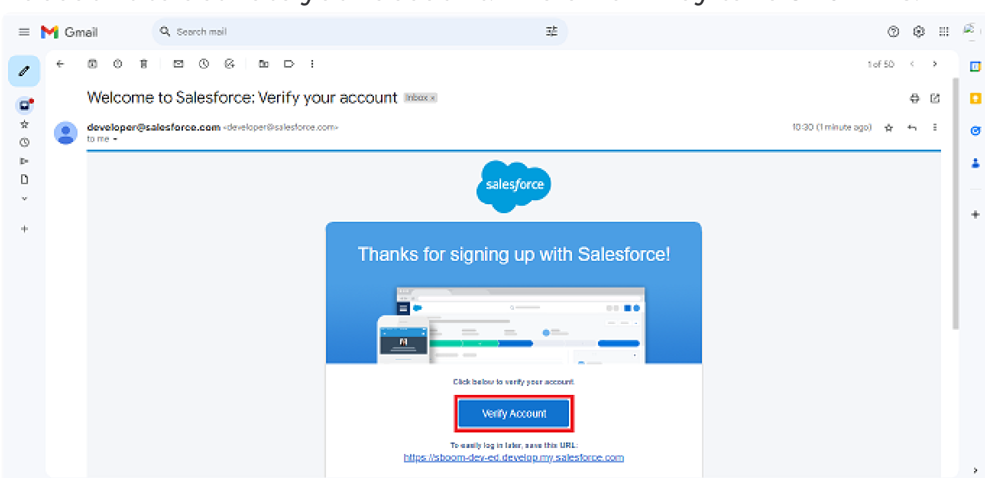
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

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

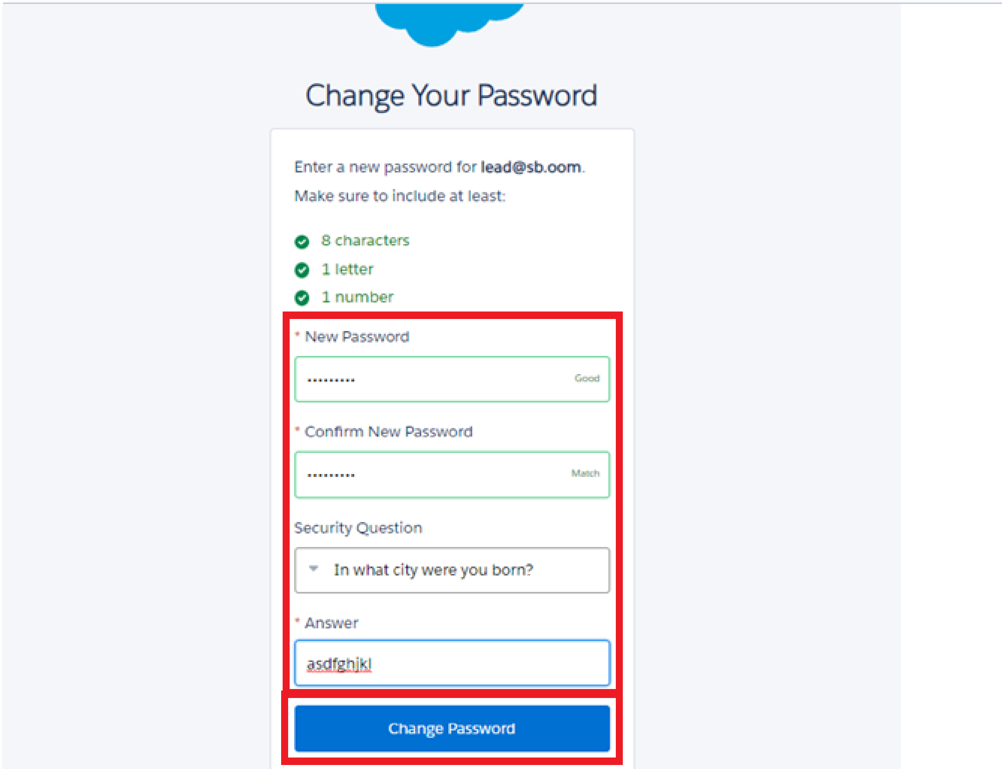
Click on sign me up after filling these.

1.2 Account Activation

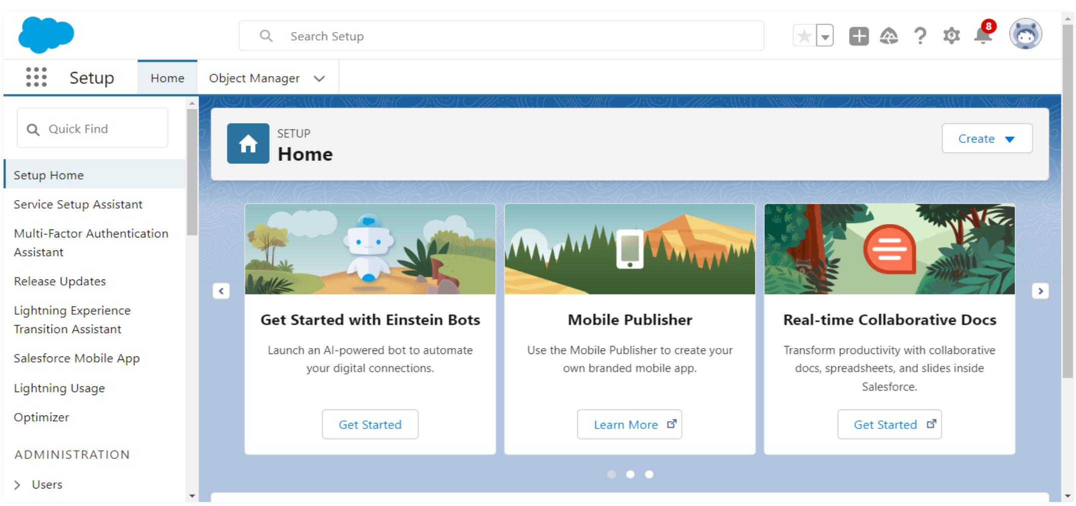
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



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



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



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:

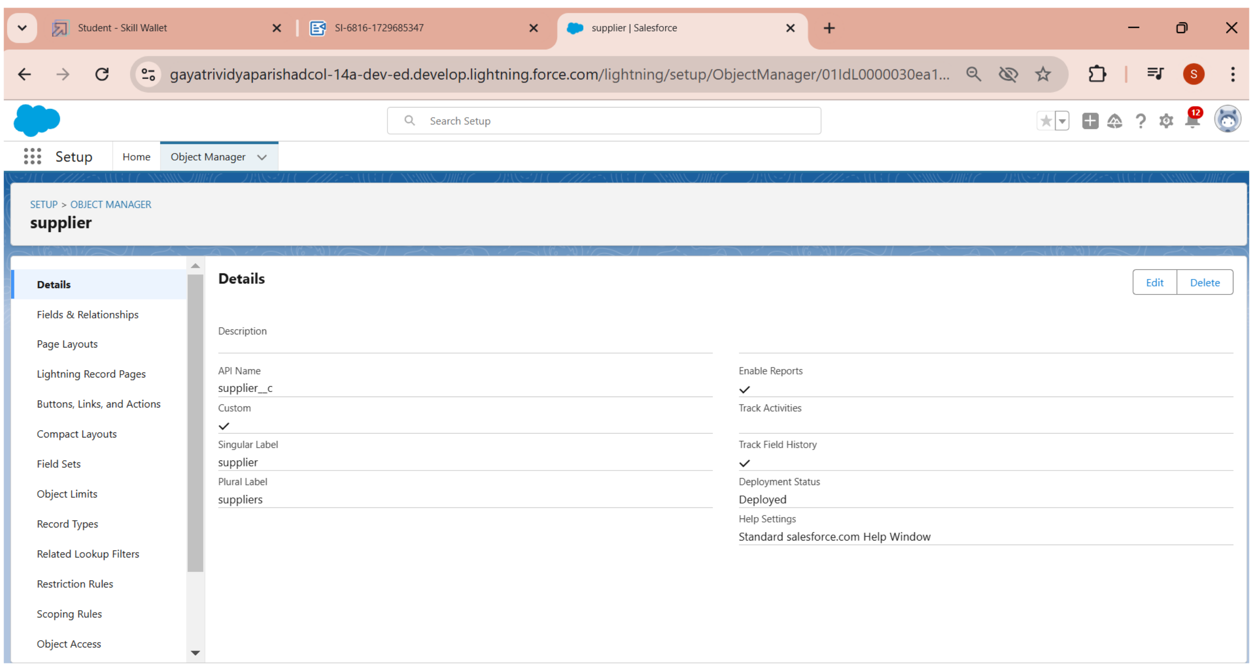
- Record Name: Supplier Name
- Data Type: Text

Set Additional Options:

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

Save the Custom Object:

- Click on Save.+



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:

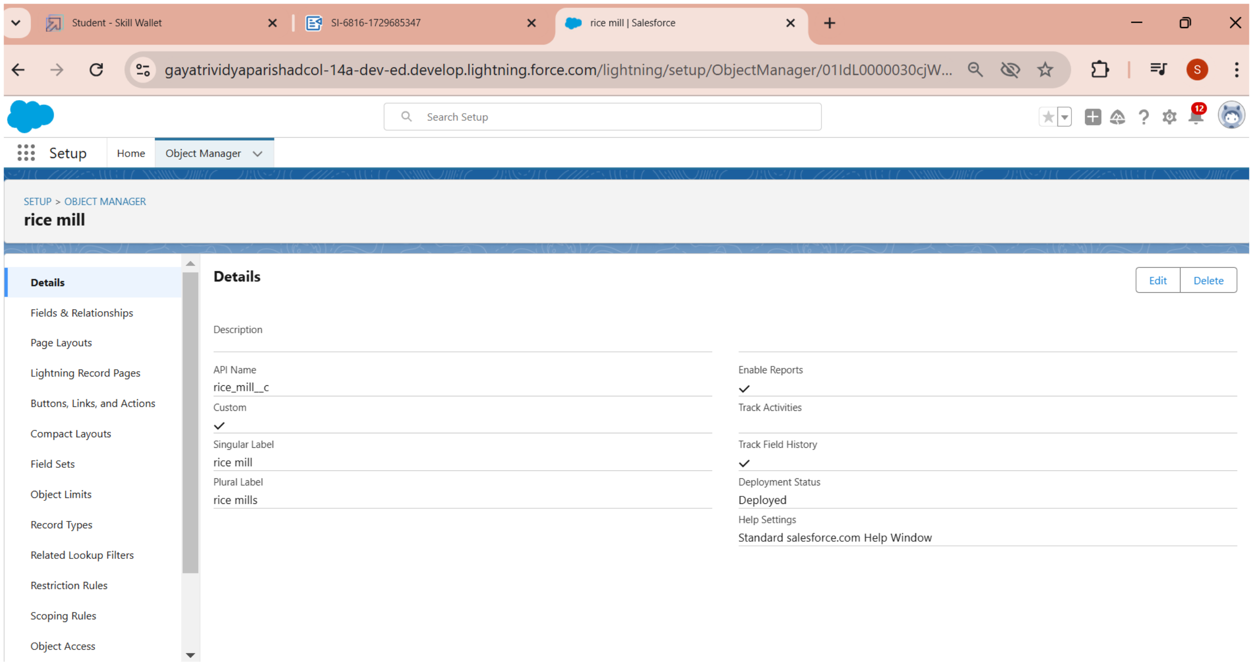
- Enter the Label Name: Rice Mill.
- Enter the Plural Label Name: Rice Mills.
- Enter the Record Name Label and Format:
- Record Name: Leave it blank.
- Data Type: Auto Number
- Display Format: rice-{000}
- Starting Number: 1

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.

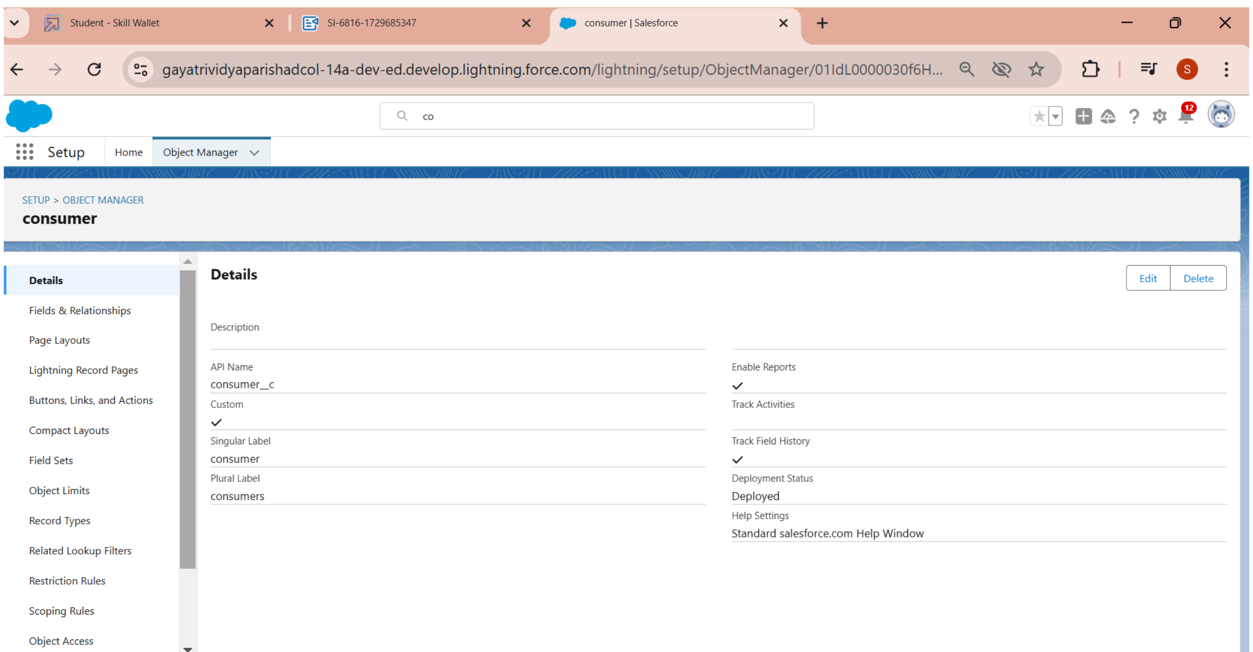
- Data Type: Auto Number
- Display Format: consumers-(000)
- Starting Number: 1

Set Additional Options:

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

Save the Custom Object:

- Click on Save.



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:

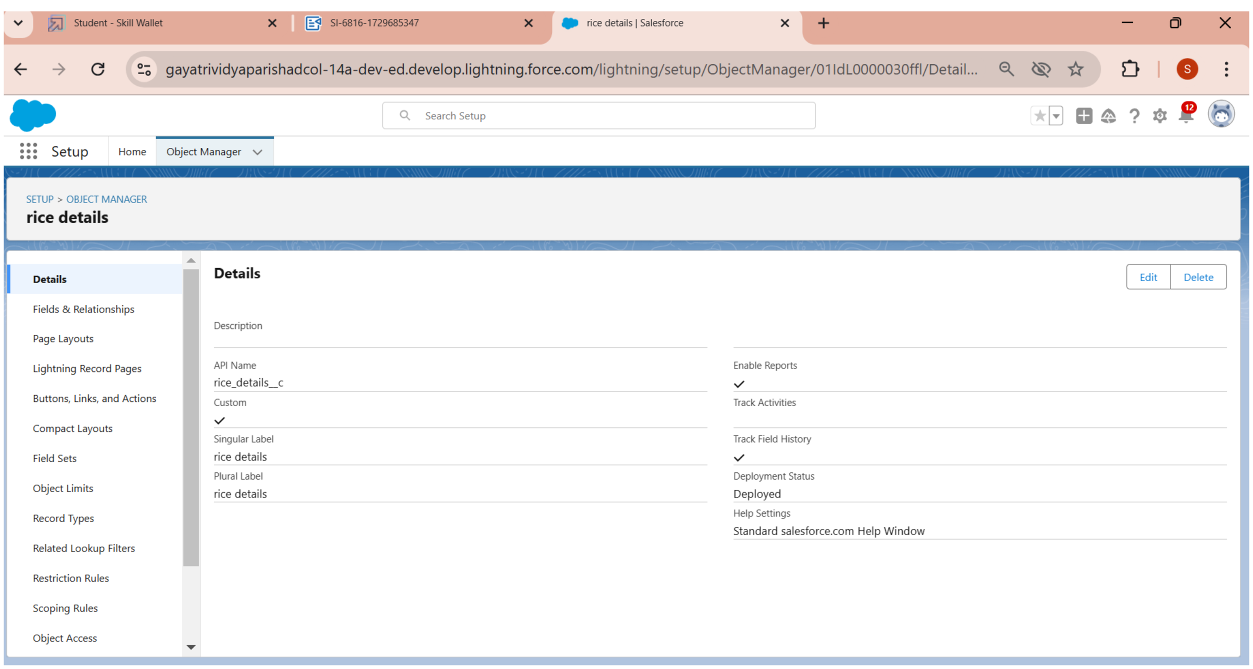
- Enter the Label Name: Rice Details.
- Enter the Plural Label Name: Rice Details.
- Enter the Record Name Label and Format:
- Record Name: Leave it blank.
- Data Type: Auto Number
- Display Format: rice-{000}
- Starting Number: 1

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:

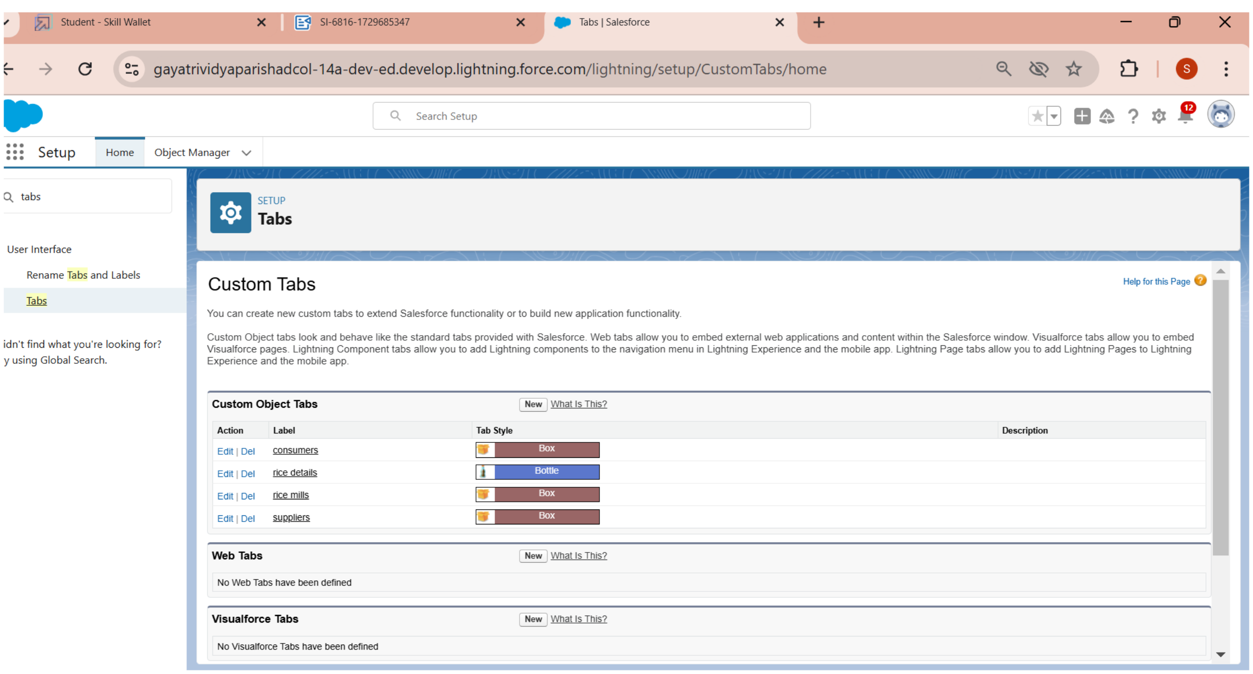
- Keep it as default. Click on Next.

Add to Custom App:

- Uncheck the Include Tab checkbox.

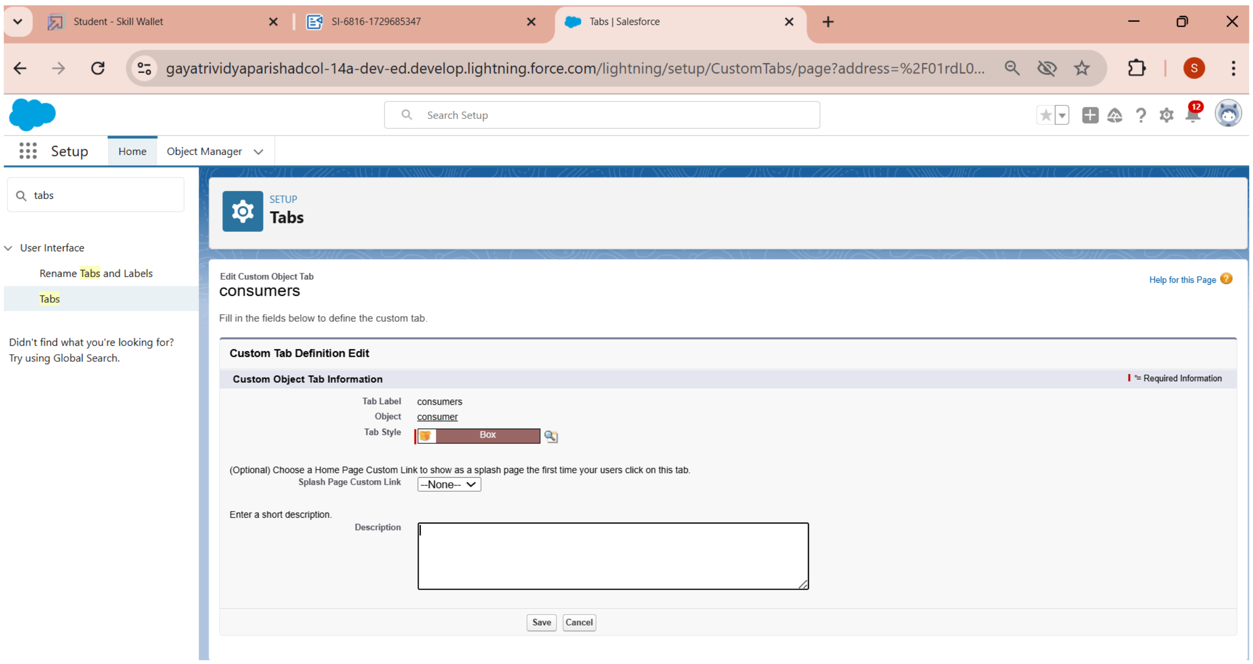
Append Tab to Users' Existing Personal Customizations:

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



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:

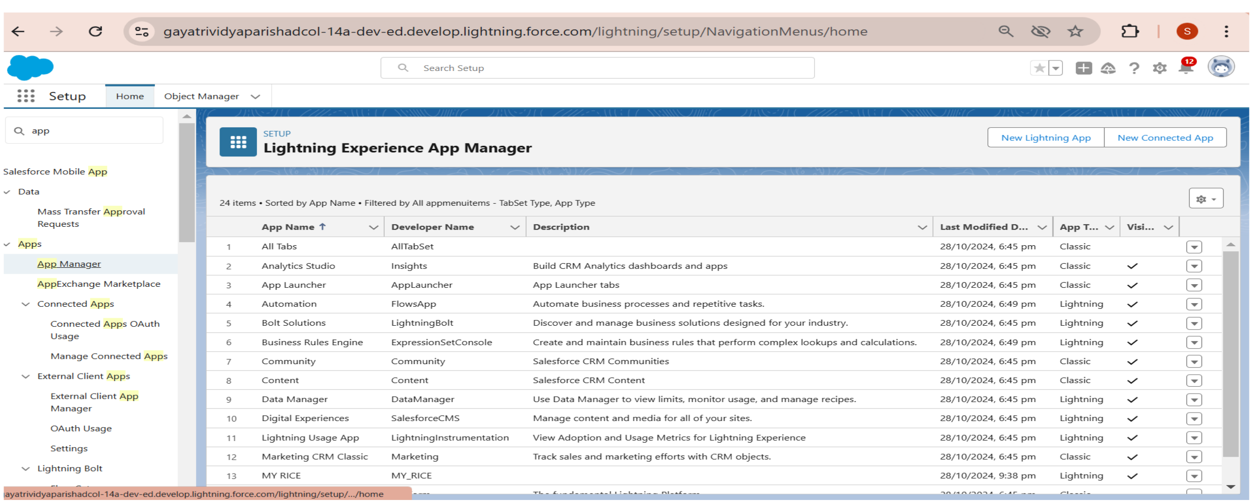
- Upload a photo that is related to your app..

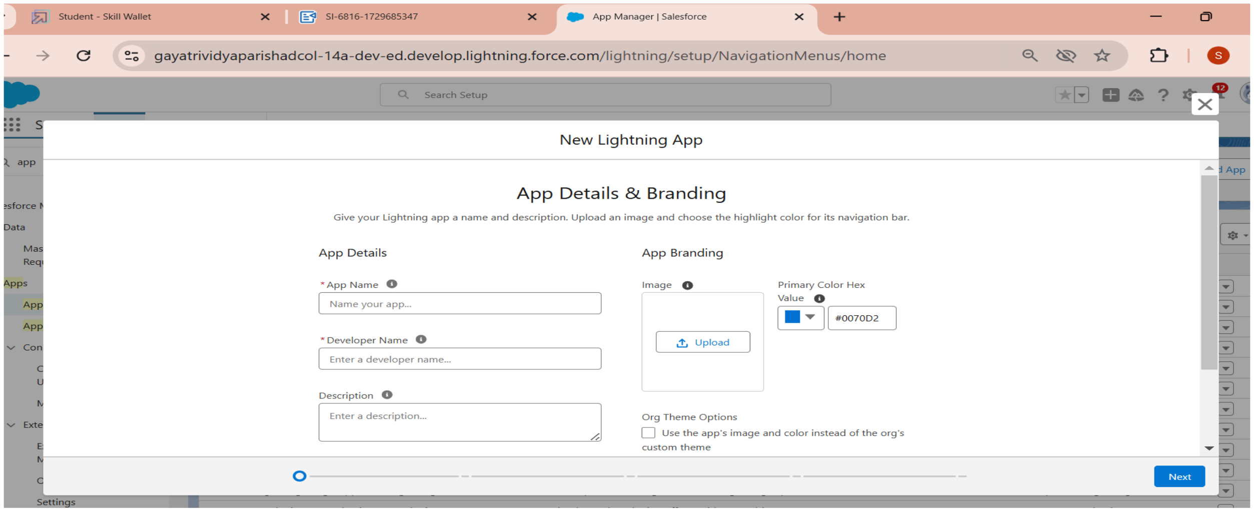
Add Navigation Items:

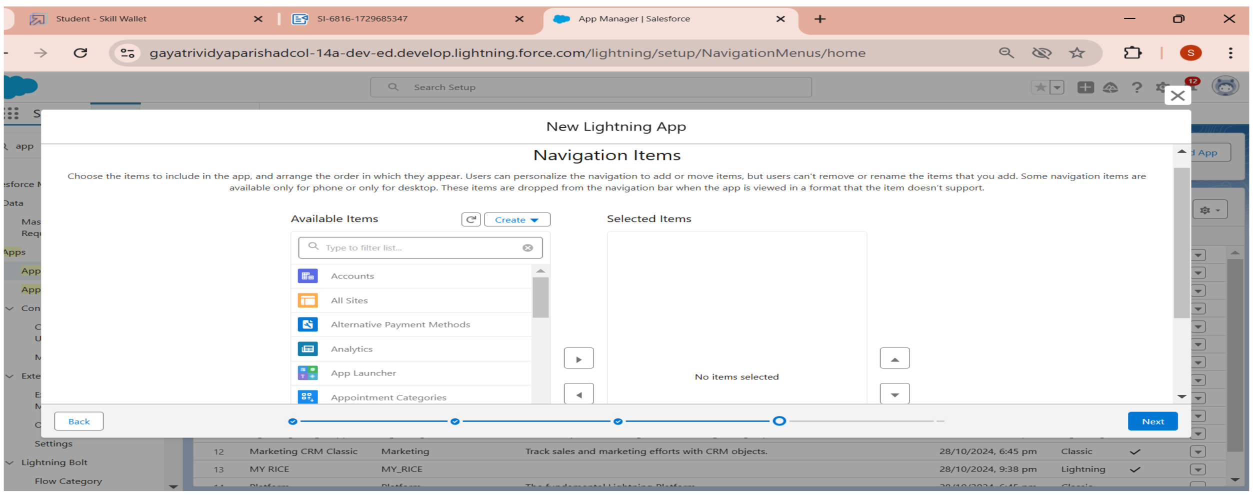
- Select the items (Supplier, Rice Mill, Consumer, Rice Details) from the search bar.
- Move the selected items using the arrow button.
- Click Next.

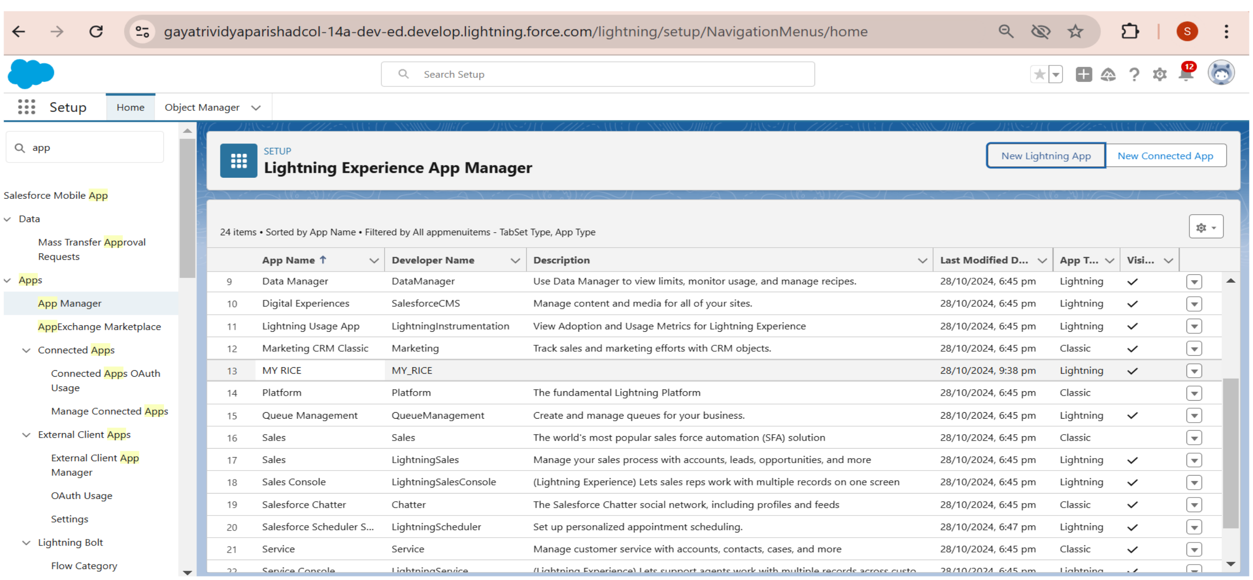
Add User Profiles:

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




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 Branding
* App Name
Name your app...
* Developer Name
Enter a developer name...
Description
Enter a description...
Image
Upload
Primary Color Hex Value
#0070D2
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
Create
Selected Items
Type to filter list...
Accounts
All Sites
Alternative Payment Methods
Analytics
App Launcher
Appointment Categories
No items selected
Back
Next
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 28/10/2024, 9:38 pm Lightning
Settings
Lightning Bolt
Flow Category


gayatrividyaparishadcol-14a-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home
Search Setup
Setup
Home
Object Manager
app
Salesforce Mobile App
Data
Mass Transfer Approval Requests
Apps
App Manager
AppExchange Marketplace
Connected Apps
Connected Apps OAuth Usage
Manage Connected Apps
External Client Apps
External Client App Manager
OAuth Usage
Settings
Lightning Bolt
Flow Category
SETUP
Lightning Experience App Manager
New Lightning App
New Connected App
24 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type
App Name
Developer Name
Description
Last Modified D...
App T...
Visi...
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 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

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:

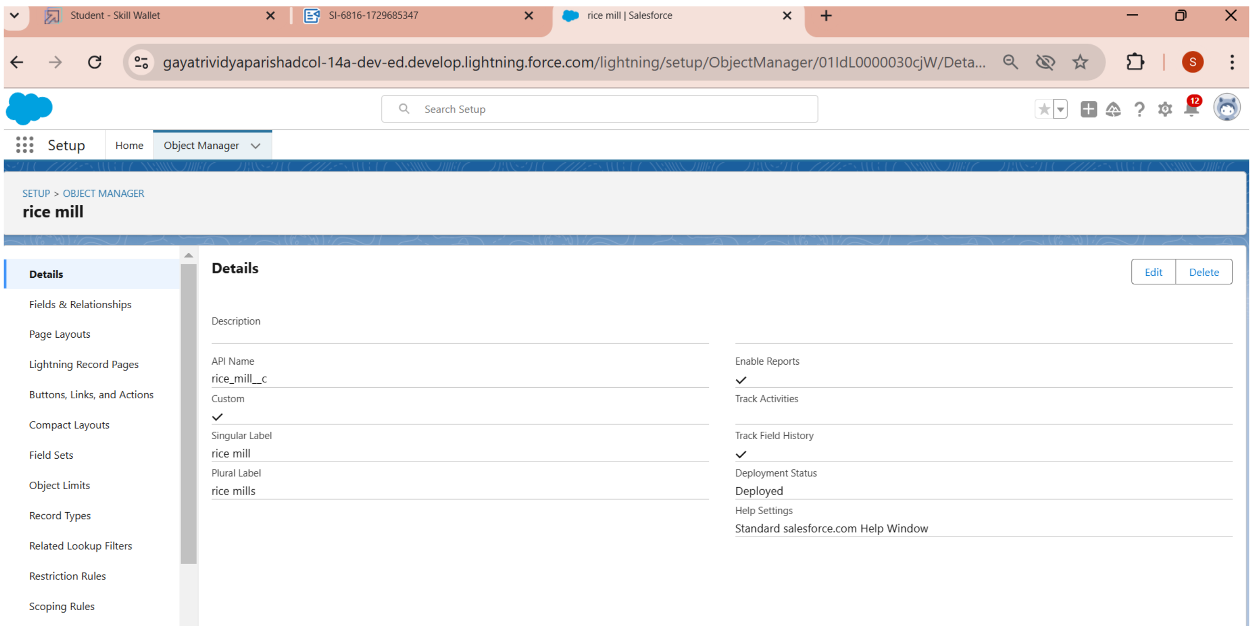
- Go to the setup page.
- Click on Object Manager.

Edit the Rice Details Object:

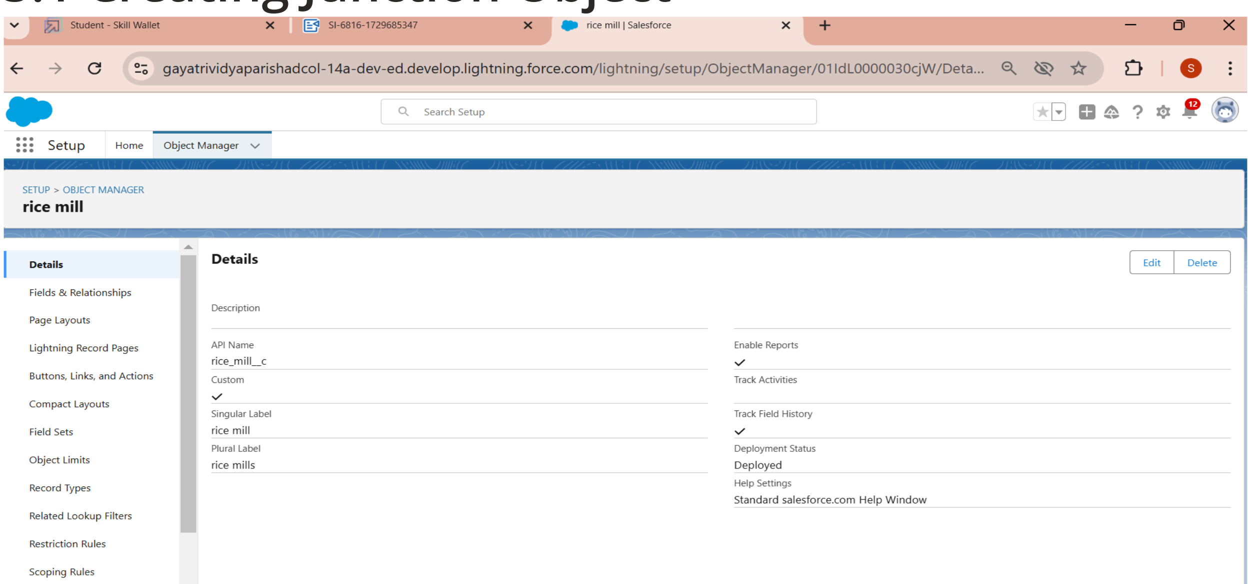
- From the dropdown, click Edit for the Rice Details object.

Create a New Field:

- Click on Fields & Relationships.
- Click on New



5.1 Creating Junction Object



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

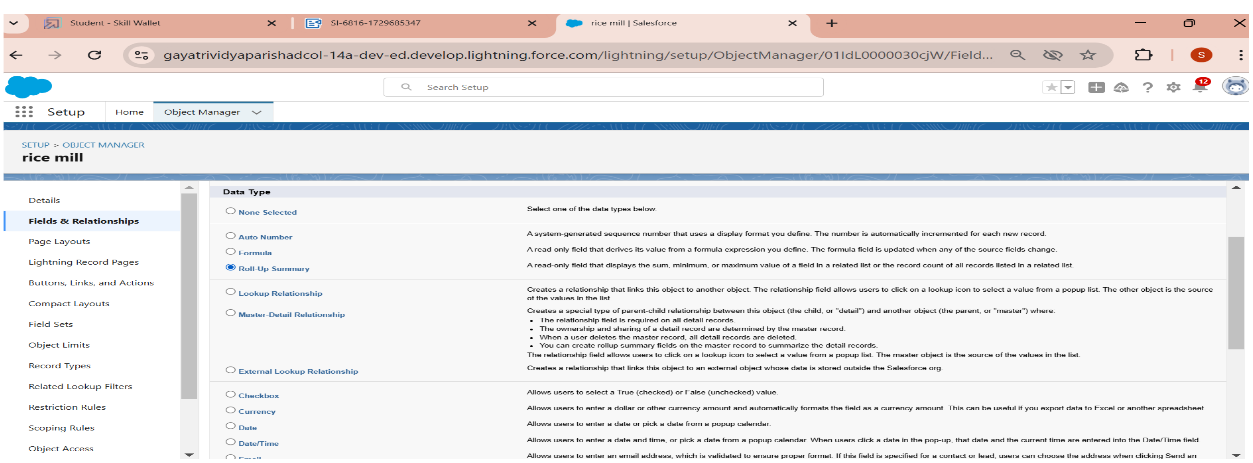
1. Go to the setup page >> click on object manager >> From drop down click edit for consumer object.
2. Click on fields & relationship >> click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. Select the related object “ rice mill”.
5. Give Field Label as “rice mill name”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

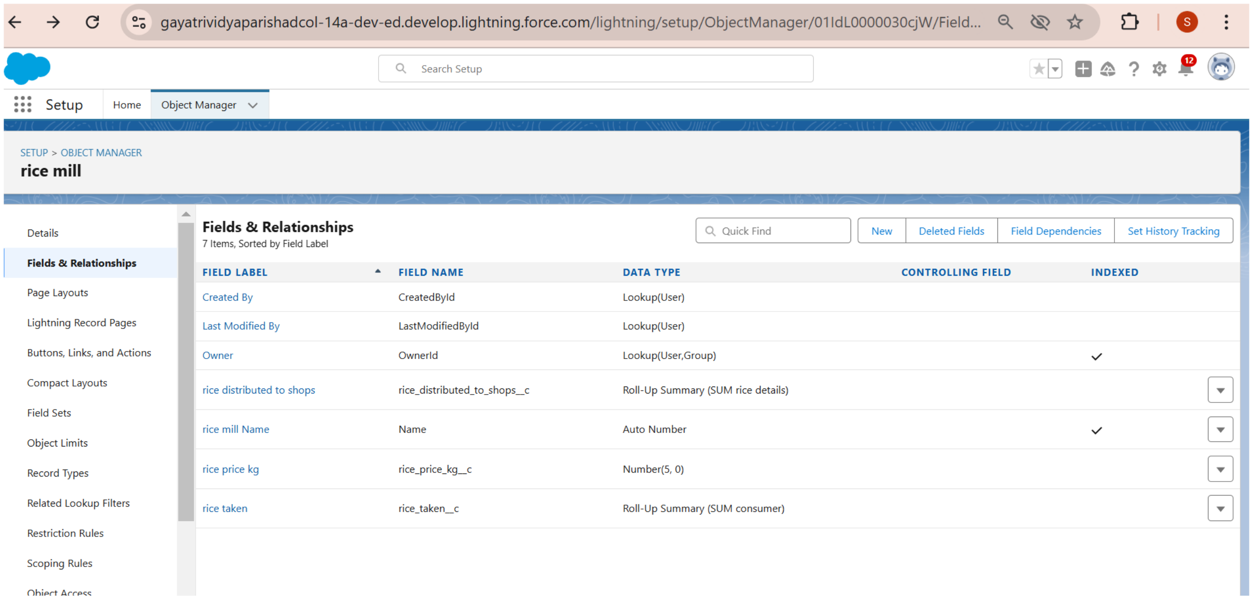
5.3 Creating the Roll-up Summary

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.





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:

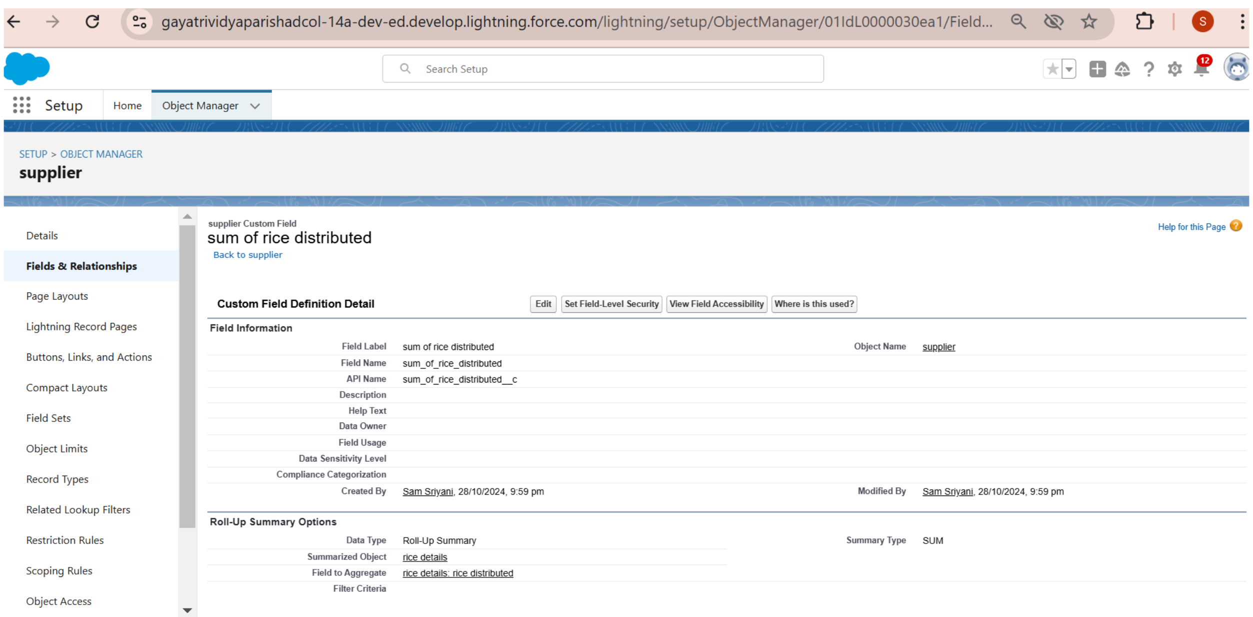
- Select the data type as Roll-up Summary.
- Click Next

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.



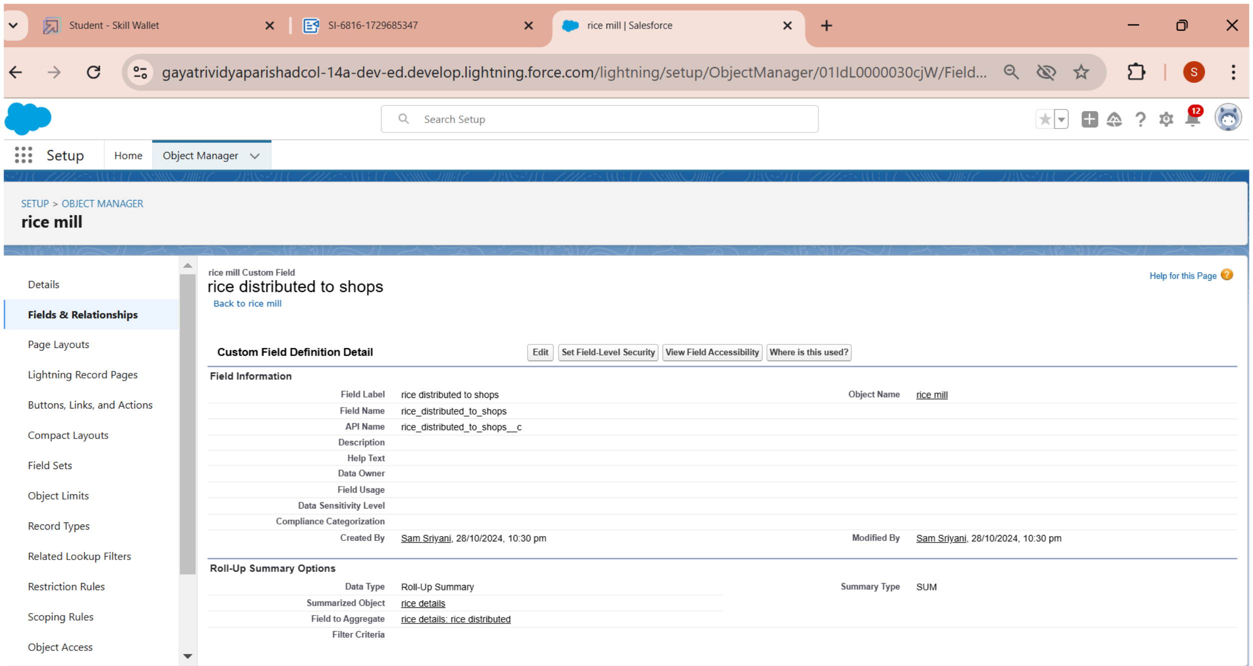
Repeat Steps for Rice Mill Object:

- 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.



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:

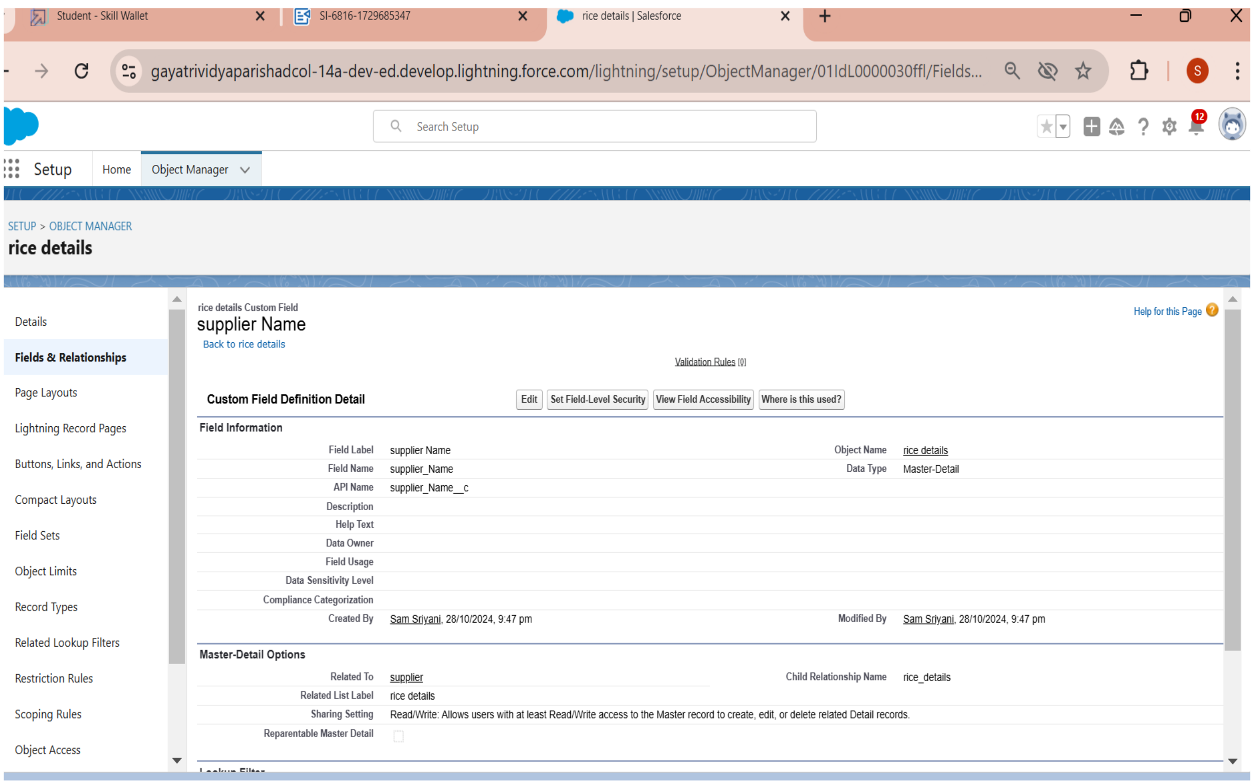
- Choose "Number" as the data type for the field.
- Click "Next."

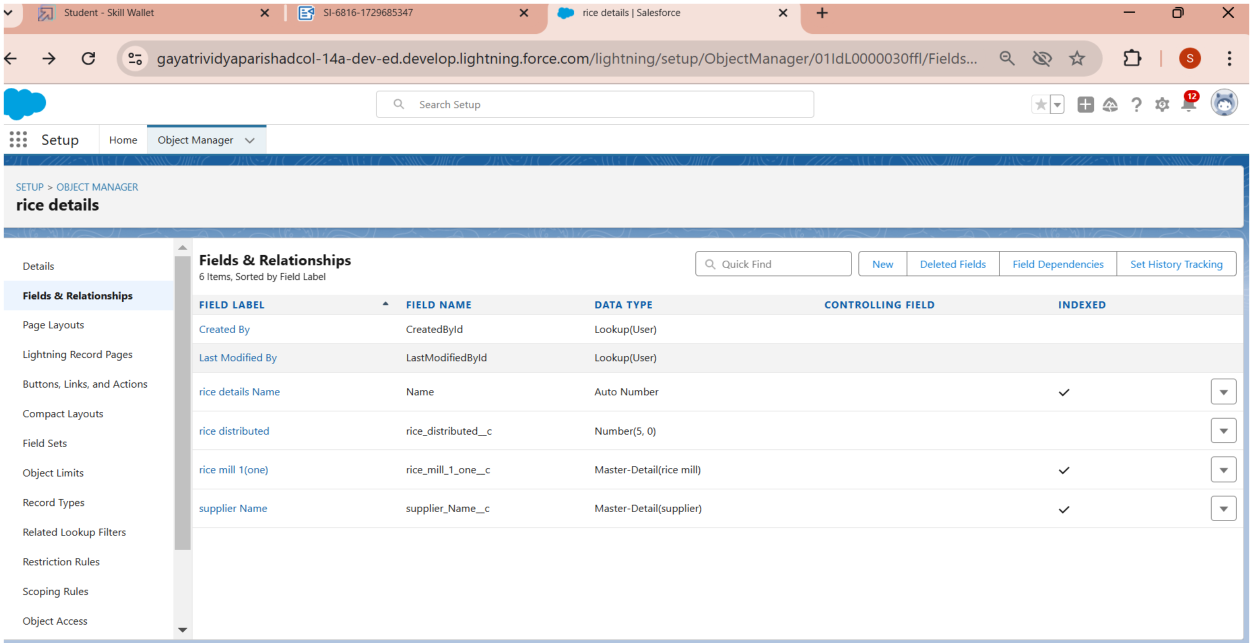
Define Field Properties:

- 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.





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:

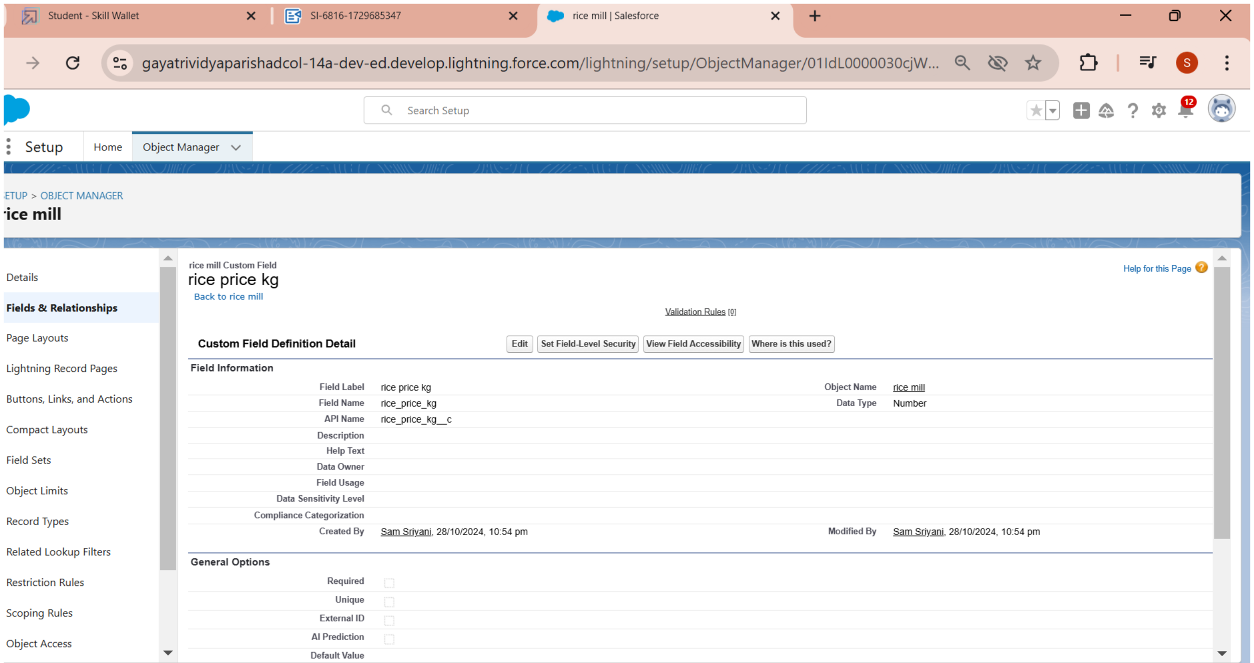
- In Object Manager, find and select "Rice Mills" from the list of objects.
- Click on "Fields & Relationships."

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"



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:

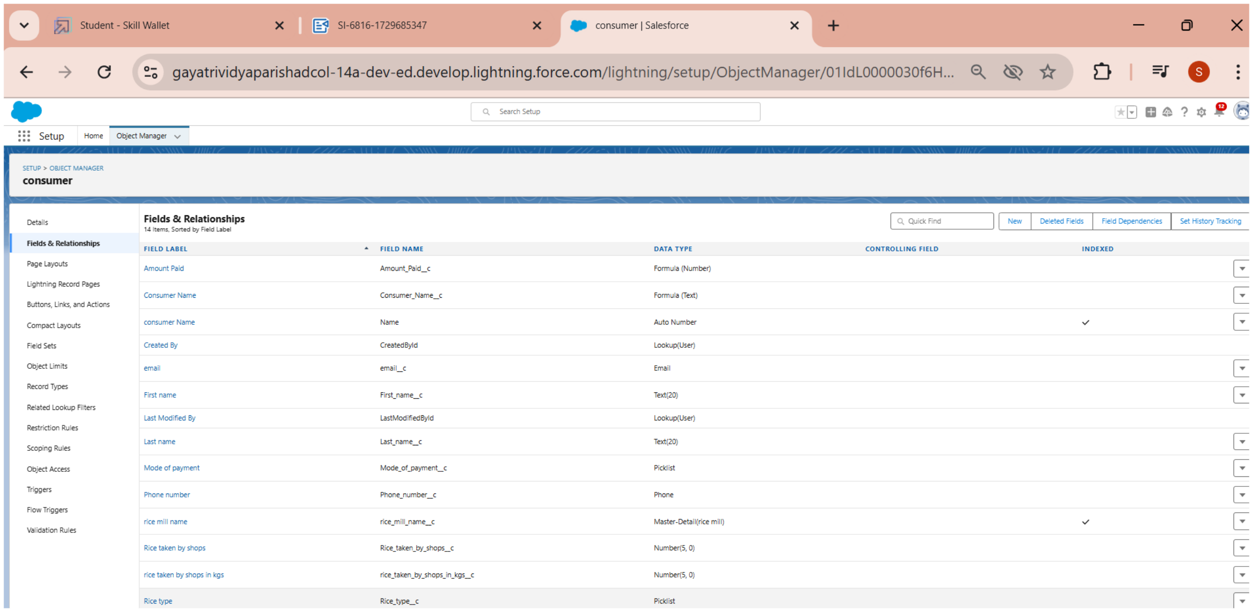
Create New Field For Rice Taken By Shops:

Create New Field For Rice Type:

Create New Field For Phone Number

Phone number

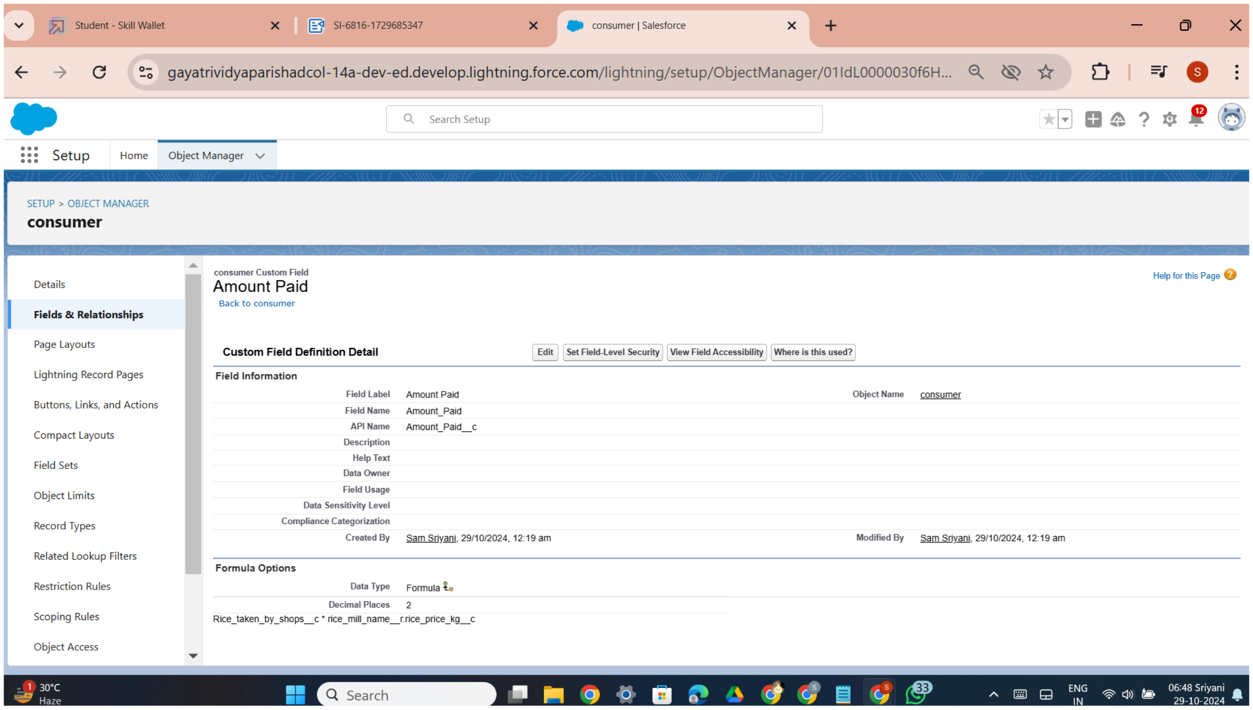
Create New Field For Mode Of Payment



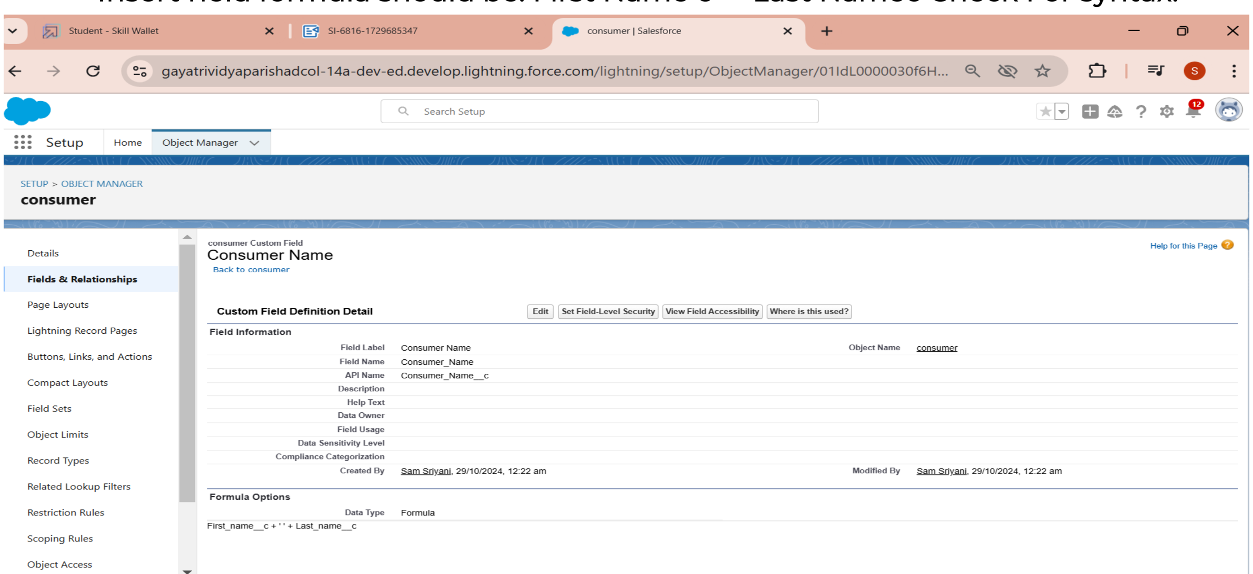
5.8 Creating Cross Object Formula Field in consumer object

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.

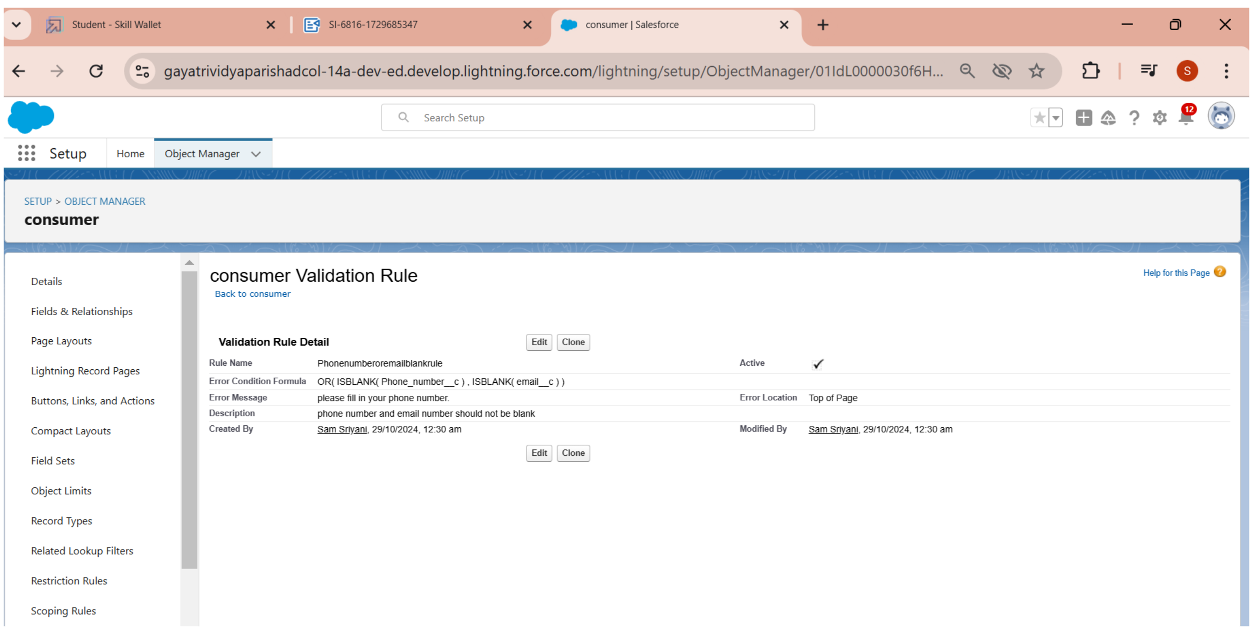


5.9 Creating the validation rule

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.

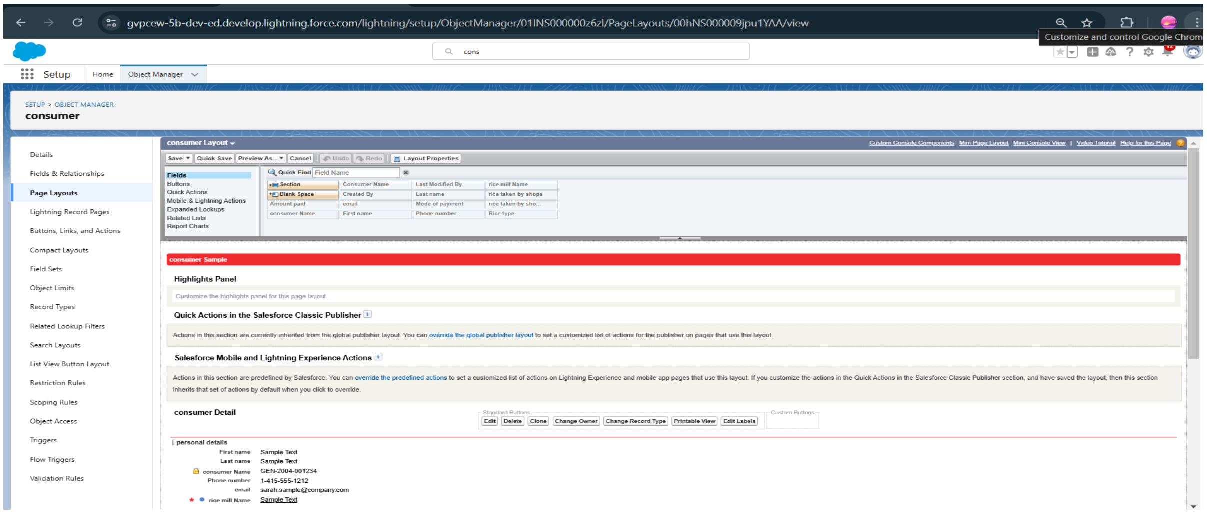
f. Now drag the fields to this section that are mentioned: First Name, Last Name, Consumer Name, etc.

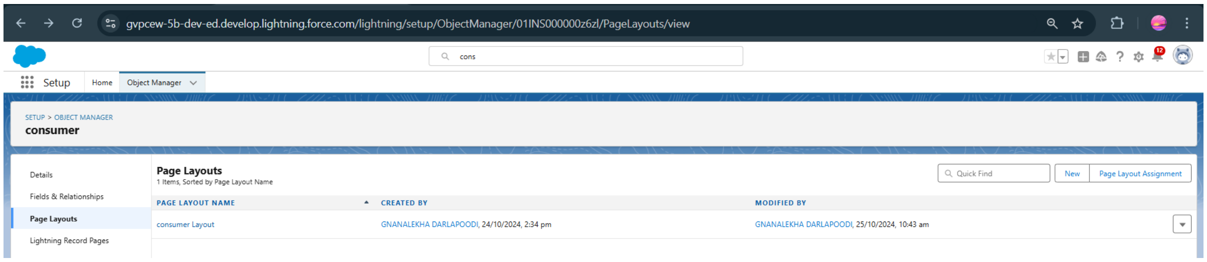
g. Follow the same process for another two sections as shown above. They are:

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

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

h. Click Save

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cons
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
consumer
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Page Layouts
1 Items, Sorted by Page Layout Name
Quick Find
New
Page Layout Assignment
PAGE LAYOUT NAME
CREATED BY
MODIFIED BY
consumer Layout
GNANALEKHA DARLAPOODI, 24/10/2024, 2:34 pm
GNANALEKHA DARLAPOODI, 25/10/2024, 10:43 am

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.

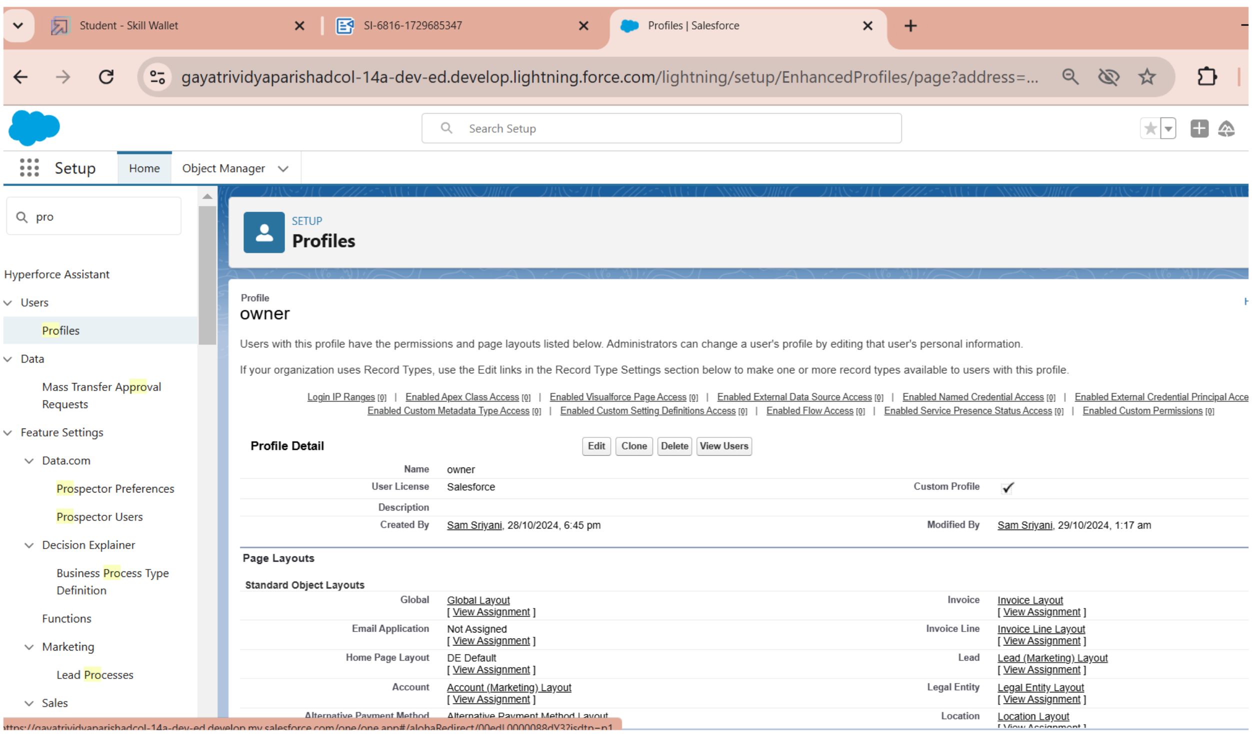
Activity 1: Owner Profile

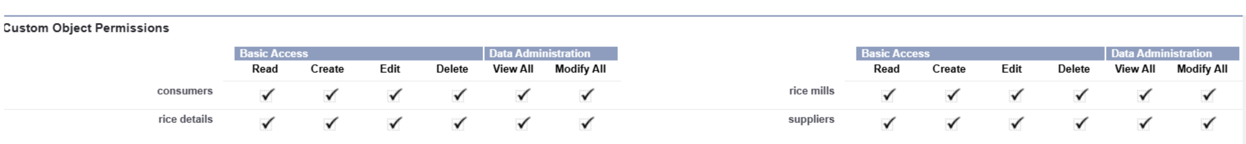
To create a new profile:

a. Go to Setup → type "Profiles" in the quick find box click on Profiles → clone the desired profile (Standard User) → enter profile name (Owner) → Save.

b. Scroll down to Custom Object Permissions and give access permissions for consumers, rice detalls, rice mill, and suppliers objects as mentioned in the below diagram.

c. Give access and save it.





Custom Object Permissions

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

Activity 2: Employer Profile

To create a new profile:

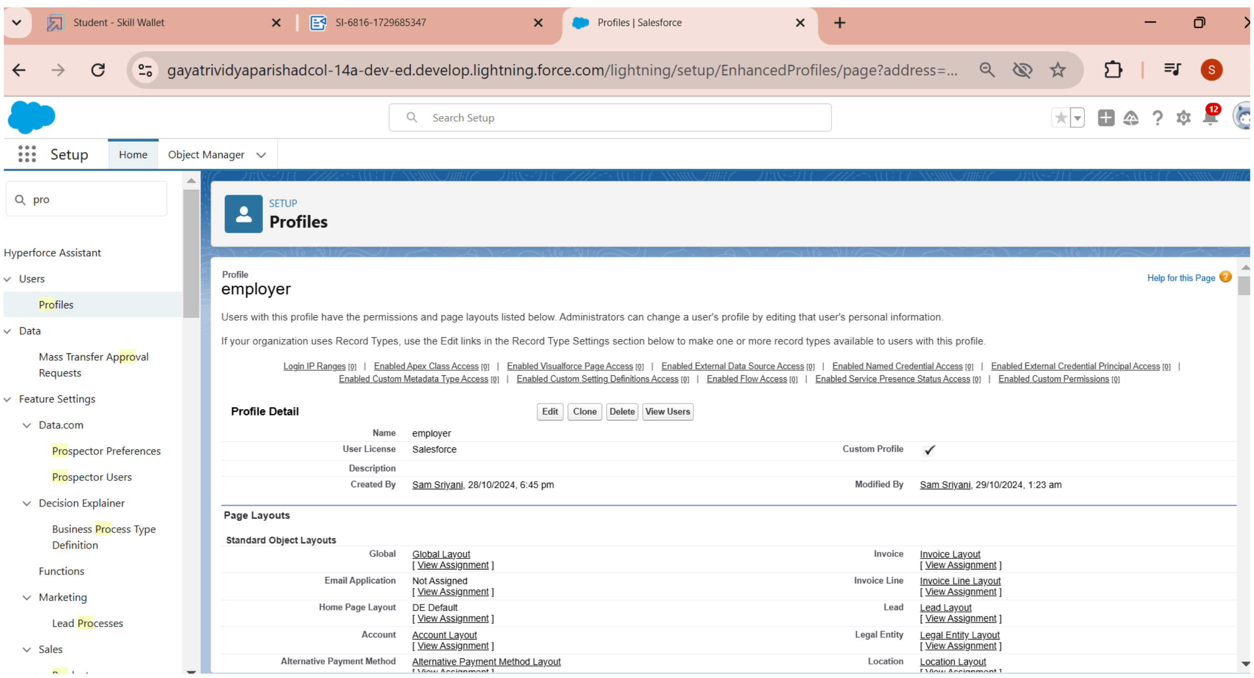
a. Go to Setup type 'Profiles" in the quick find box → click on Profiles → clone the desired profile (Standard Platform User) → enter profile name (Employer) → Save.

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.



Activity 3: Workers Profile

To create a new profile:

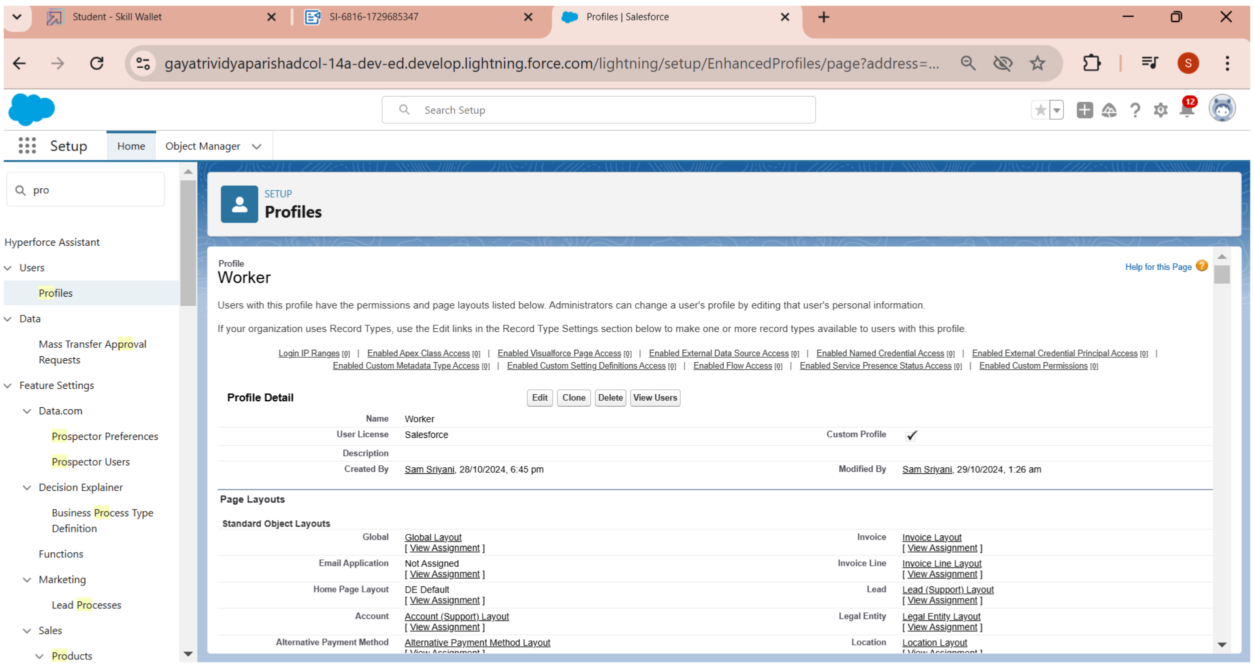
a. Go to Setup type 'Profiles" in the quick find box → click on Profiles → clone the desired profile (Standard Platform User) → enter profile name (Workers) → Save.

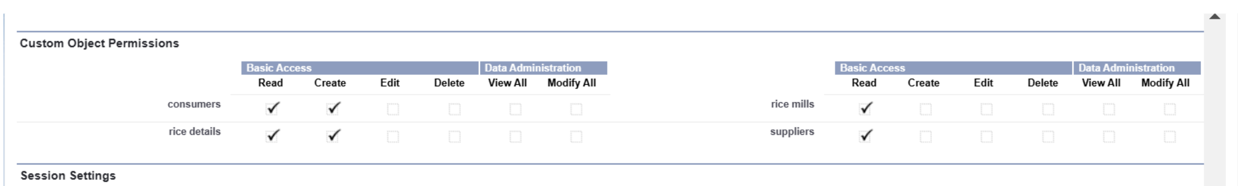
b. While still on the profile page, click Edit.

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.





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.

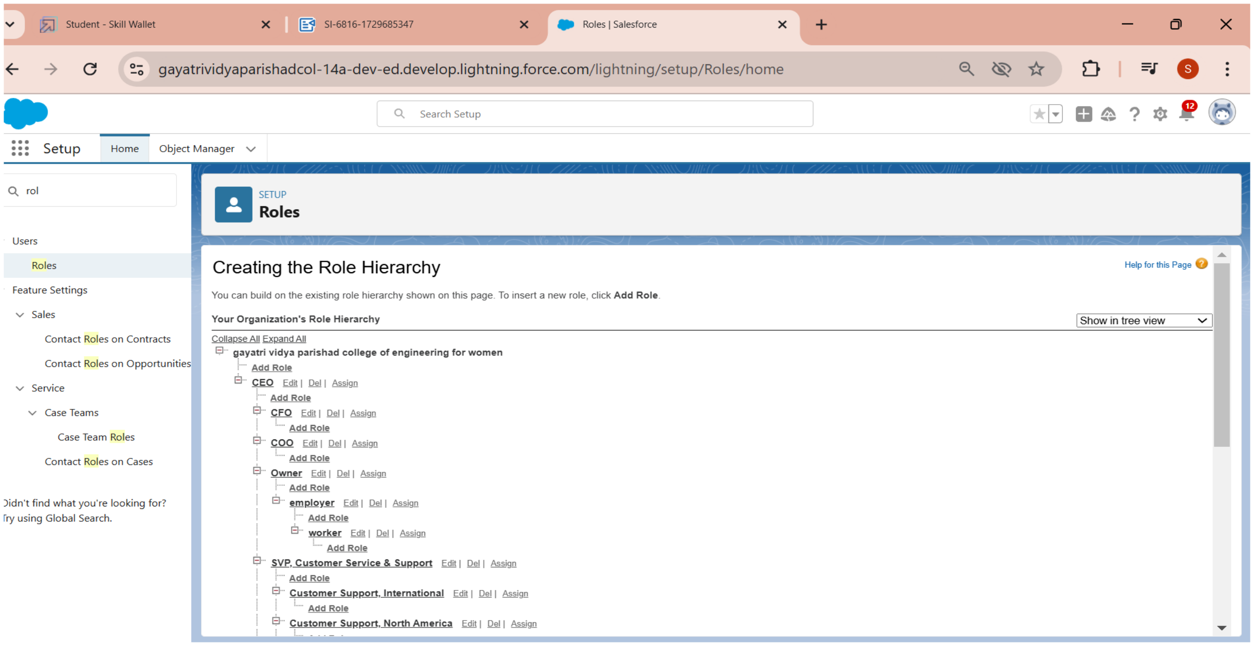
f. Click the plus on CEO role, and click Add Role under Owner.

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

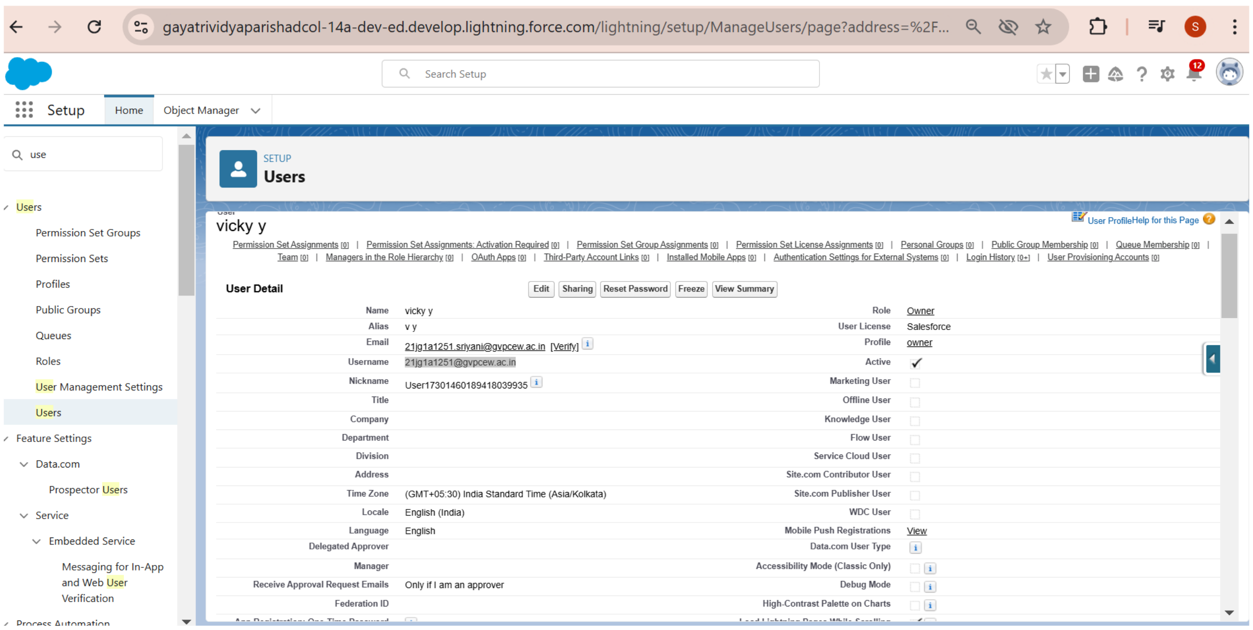
f. Nickname: Vicky

g. Role: Owner

h. User License: Salesforce

i. Profile: Owner

j. Save it.



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

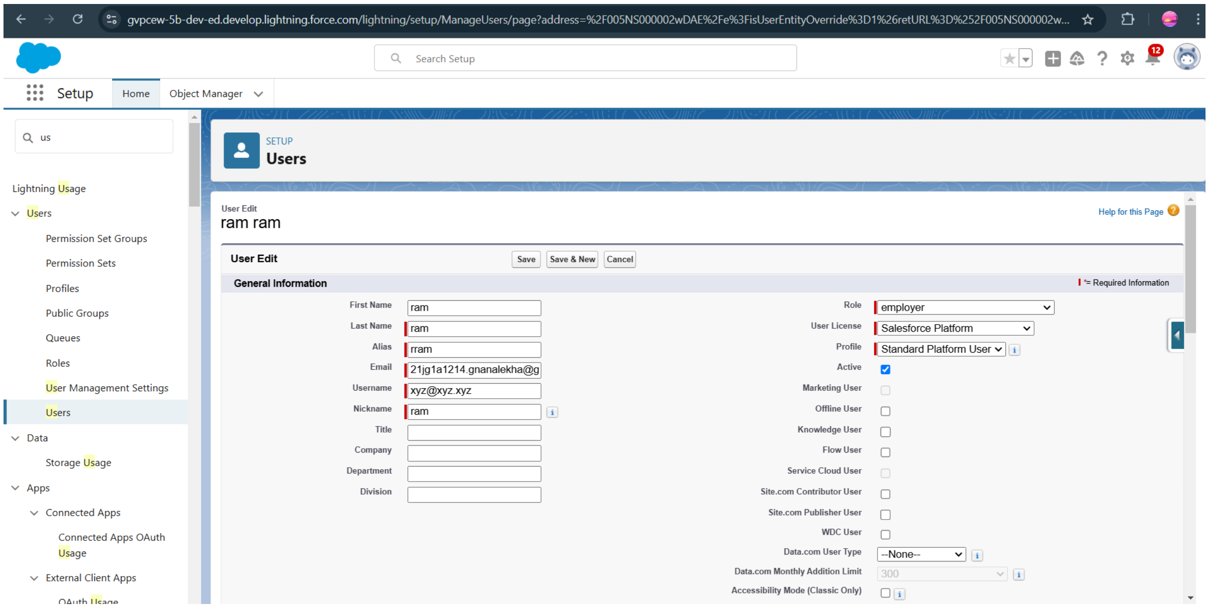
e. Username:sriyani@gvpcew.ac.in

f. Nickname: ram

g. Role: EmployerUser License: Salesforce Platform

h. Profile: Standard Platform User

i. Save it.



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

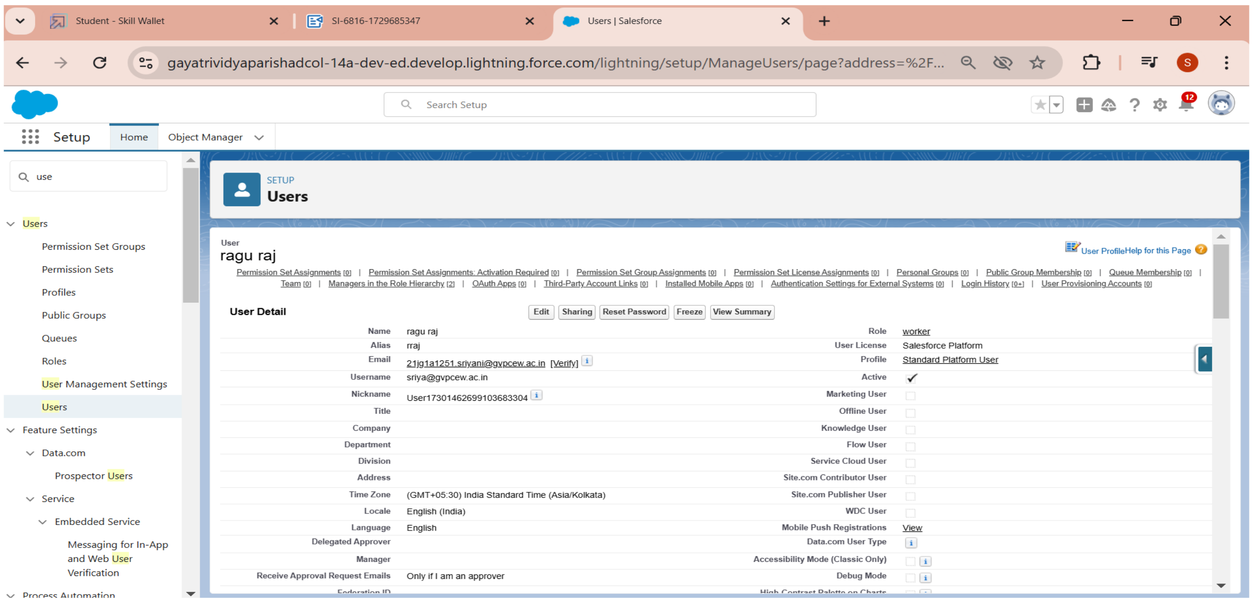
f. Nickname: ragu

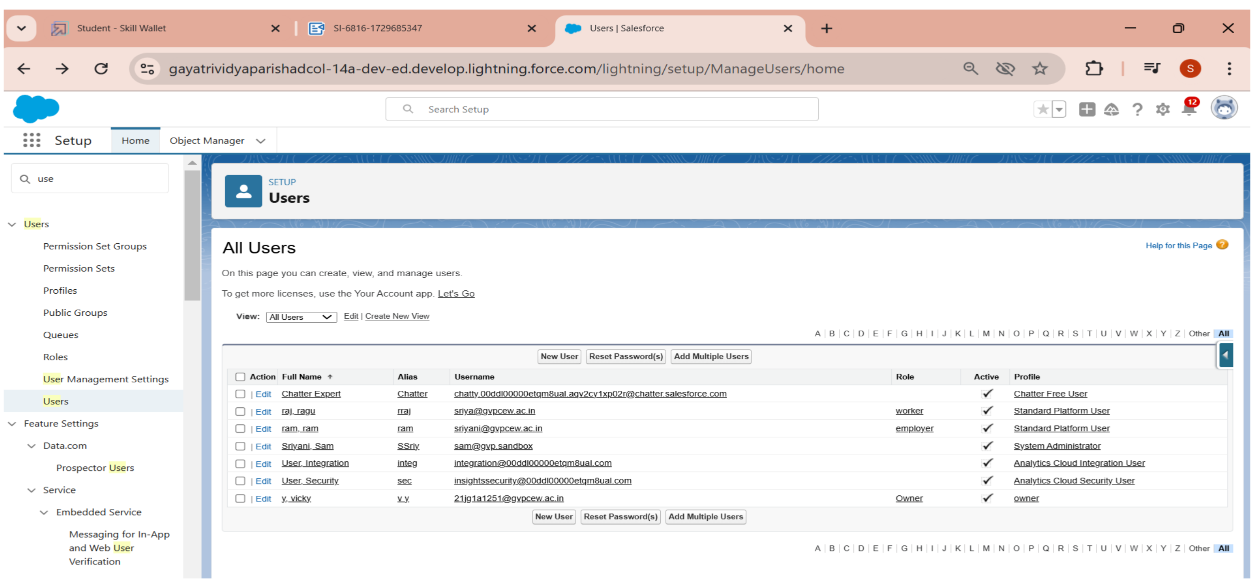
g. Role: Worker

h. User License: Salesforce Platform

i. Profile: Standard Platform User

j. Save it.





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

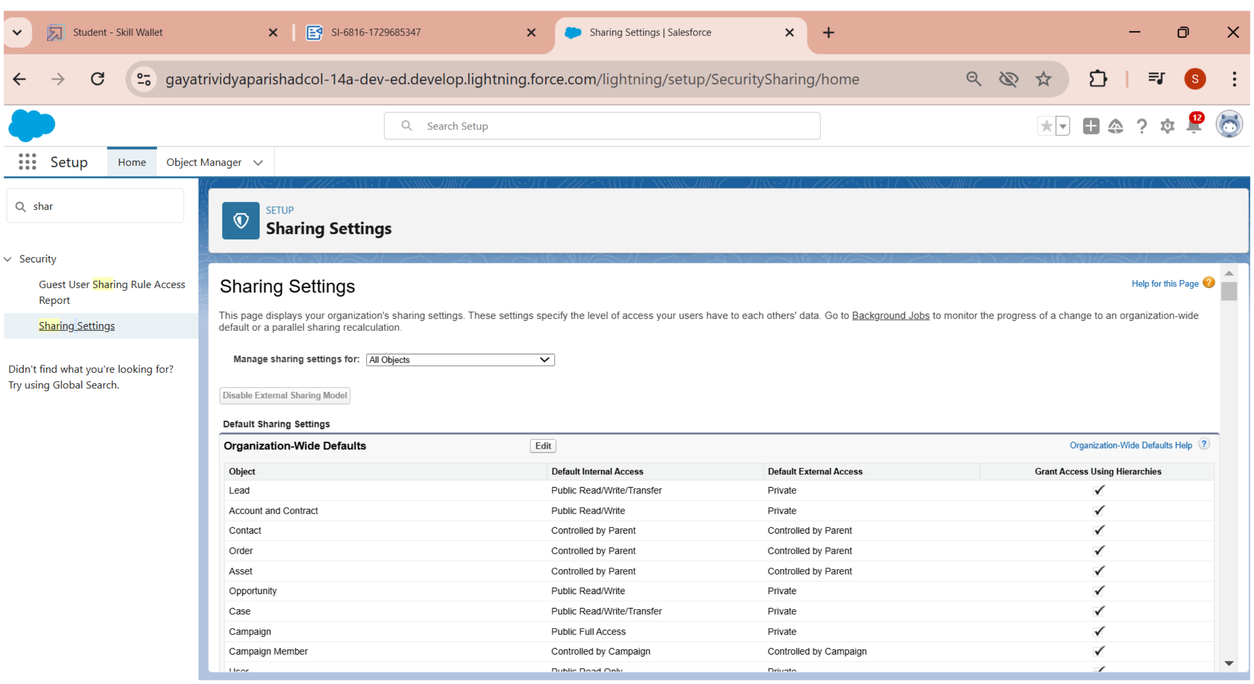
a. Go to Setup type 'Sharing Settings" in quick search → Click Edit.

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.



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.

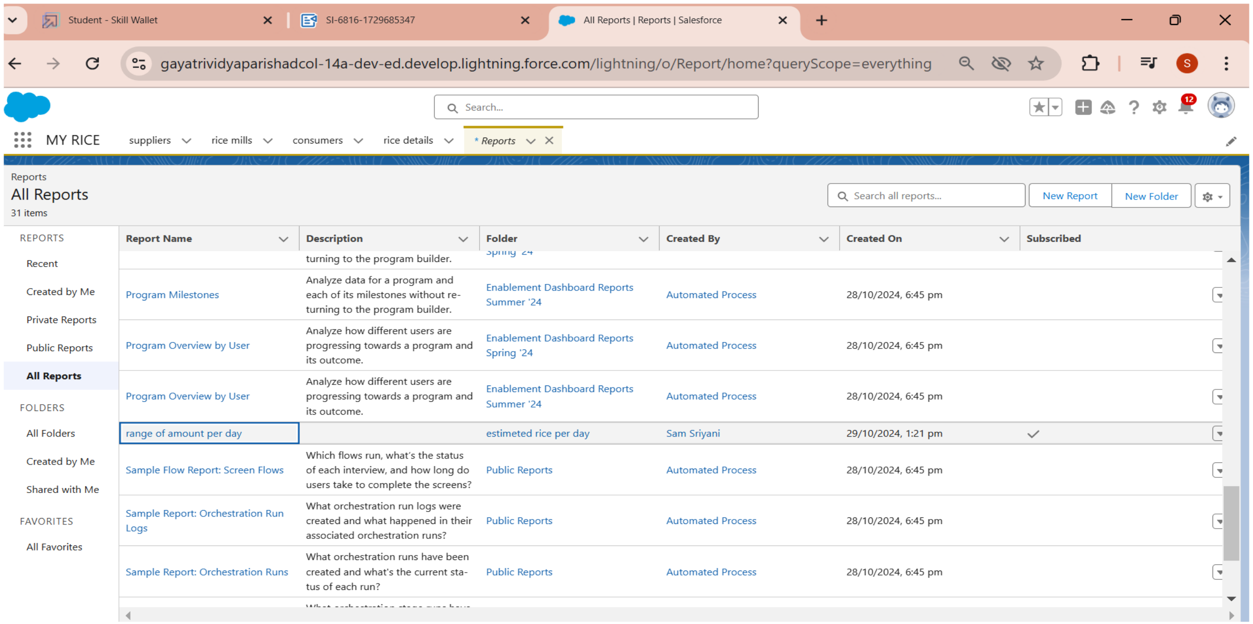
b. Select the field that is mentioned below in the Group Rows section:

    a. Rice Taken by Shops

a. Click Save and Run.

b. Save the report as 'Range of Amount per Day"

c. Save it.



11.2 Sharing report to owner

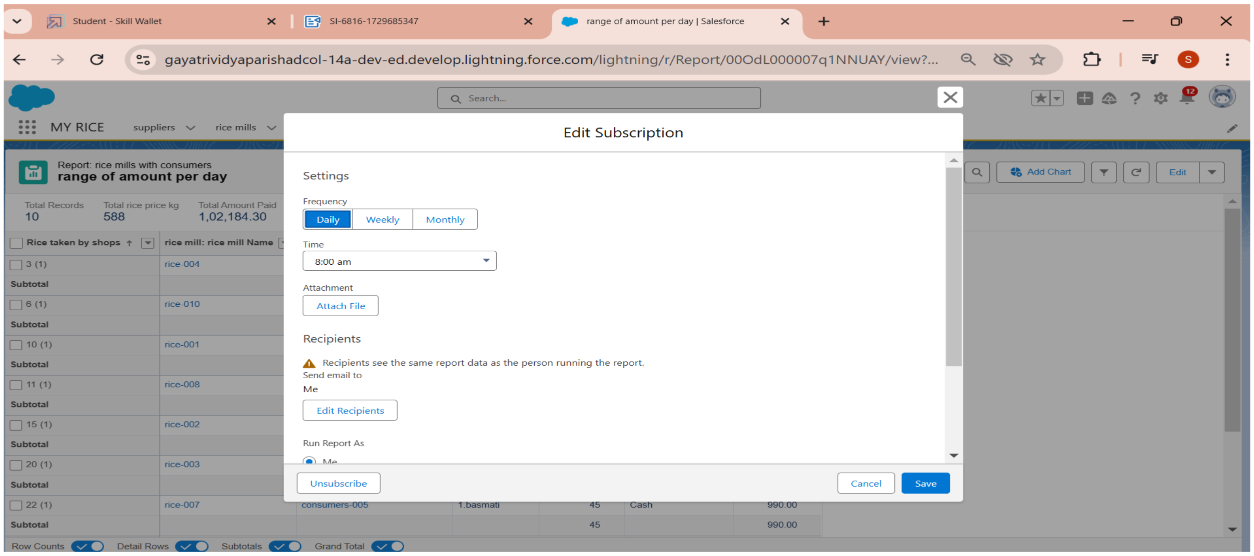
a. Click on the report to open it.

b. Click the Edit dropdown menu and select the Subscribe option.

c. After selecting to run the report as "Another Person," select your personal account or the person you want to send the email to.

d. Click Save.

e. Note: The owner gets a daily email notification of the Rice Mill report so that they can see all data remotely.



11.3 create a report folder

Steps to Create a Report Folder:

a. Click on the App Launcher and search for "Reports".

b. Double-click on "Reports". The "Reports tab" will be auto-populated in the navigation bar.

c. Click on the "Reports" tab, then click on New Folder.

d. Give the Folder Label as "Estimated Rice per Day". The Folder Unique Name will be auto-populated.

e. Click Save.

Moving a Report to the New Folder:

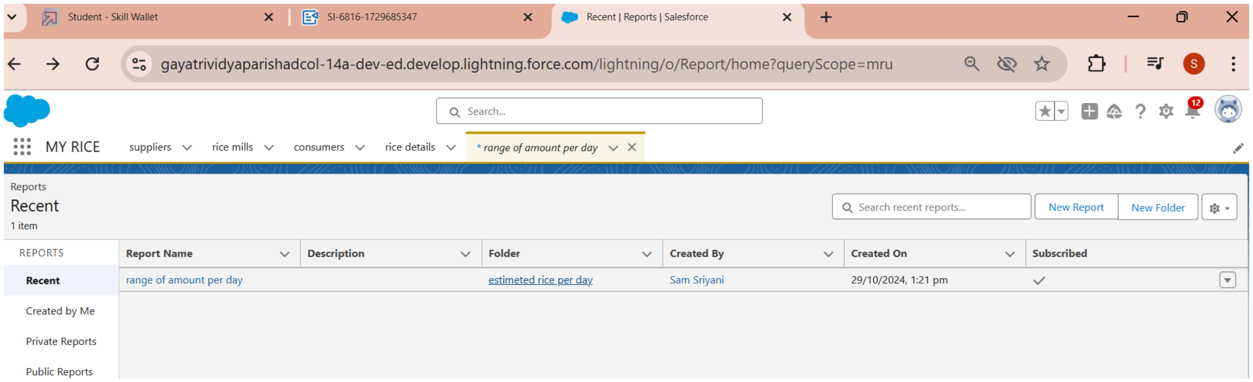
a. Navigate to the App Launcher and click on Reports.

b. Click All Reports.

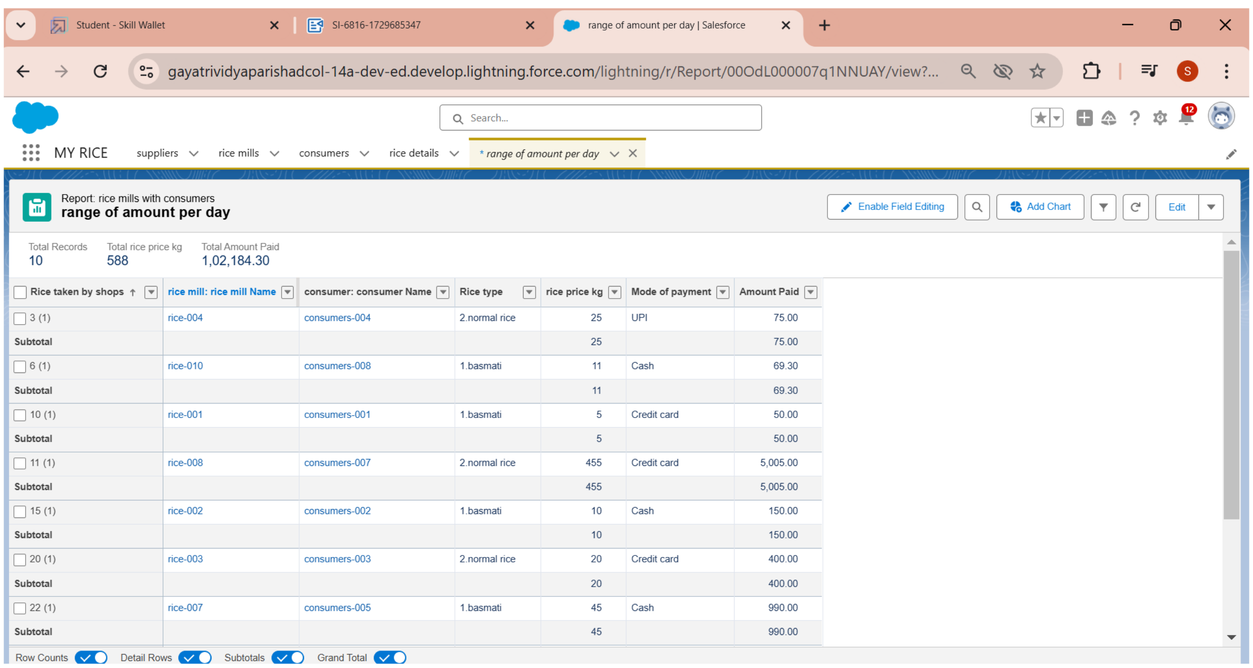
c. Select the 'Range of Amount per Day" report from the dropdown menu.

d. Click Move.

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



Overall Reports(Range of amount per day)



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".

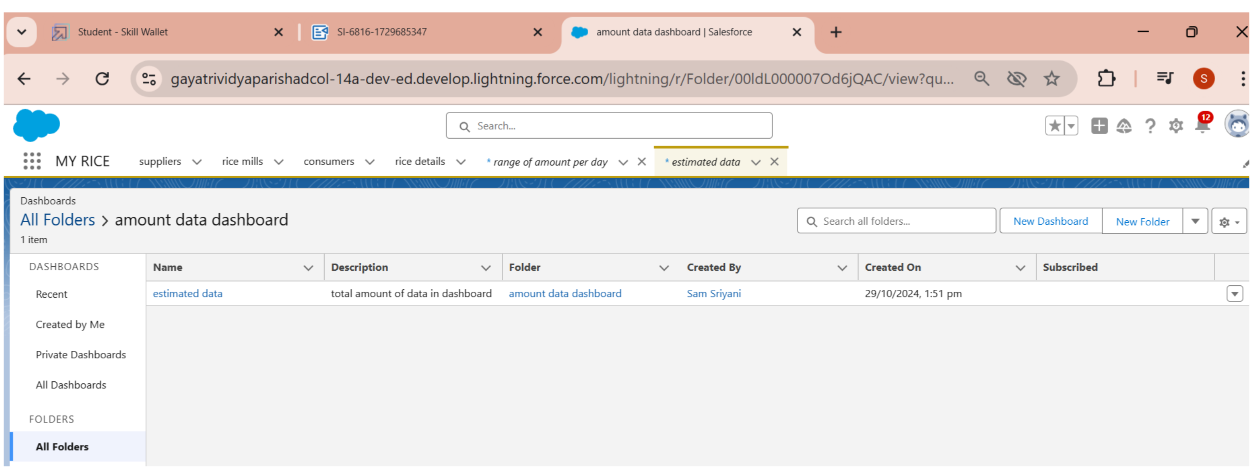
b. Click on the Dashboard tab.

c. Click New Folder.

d. Give the Folder Label as "Amount Data Dashboard".

e. Folder Unique Name will be auto-populated.

Click Save.



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:

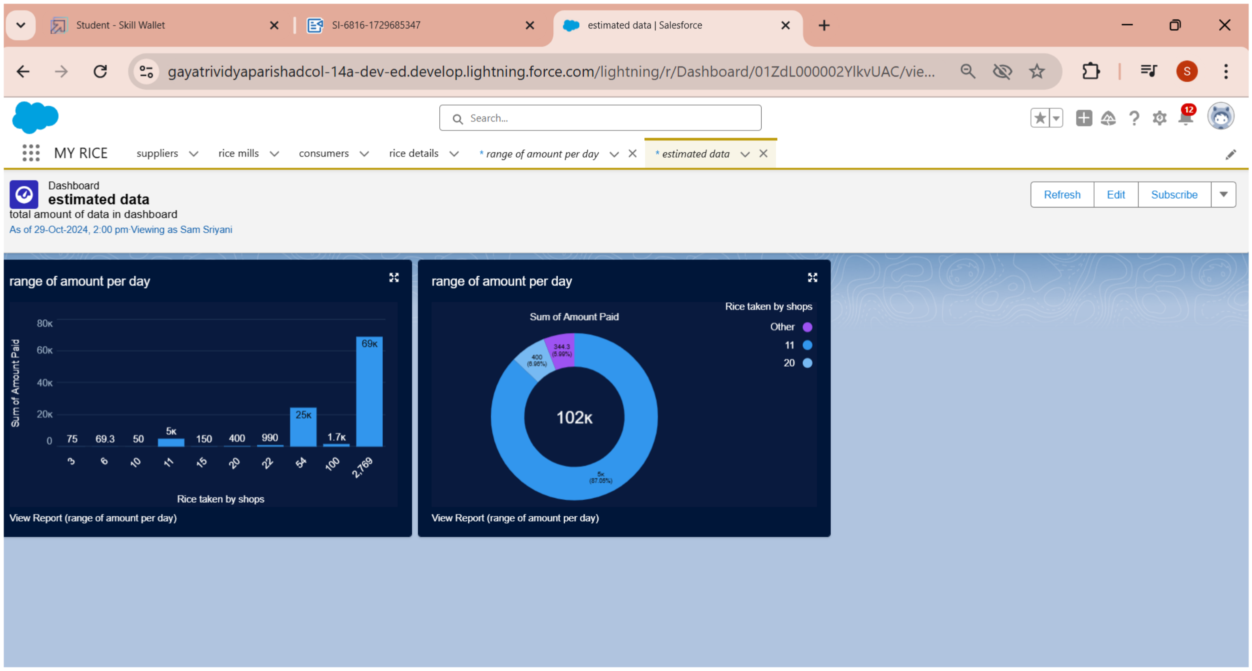
k. Select Add Component with the same steps as above.

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:

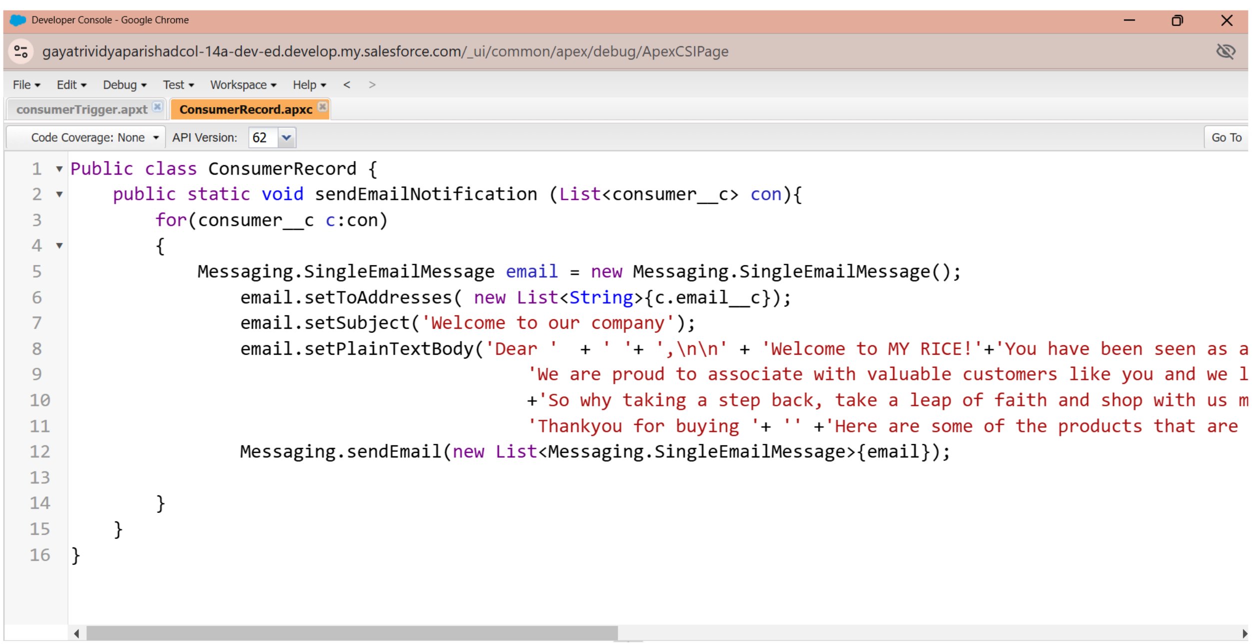
  As in Java, you can create classes in Apex. A class is a template or blueprint from which objects are created. An object is an instance of a class.

- 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



13.2 Creating an Apex Trigger

How to create a new trigger :

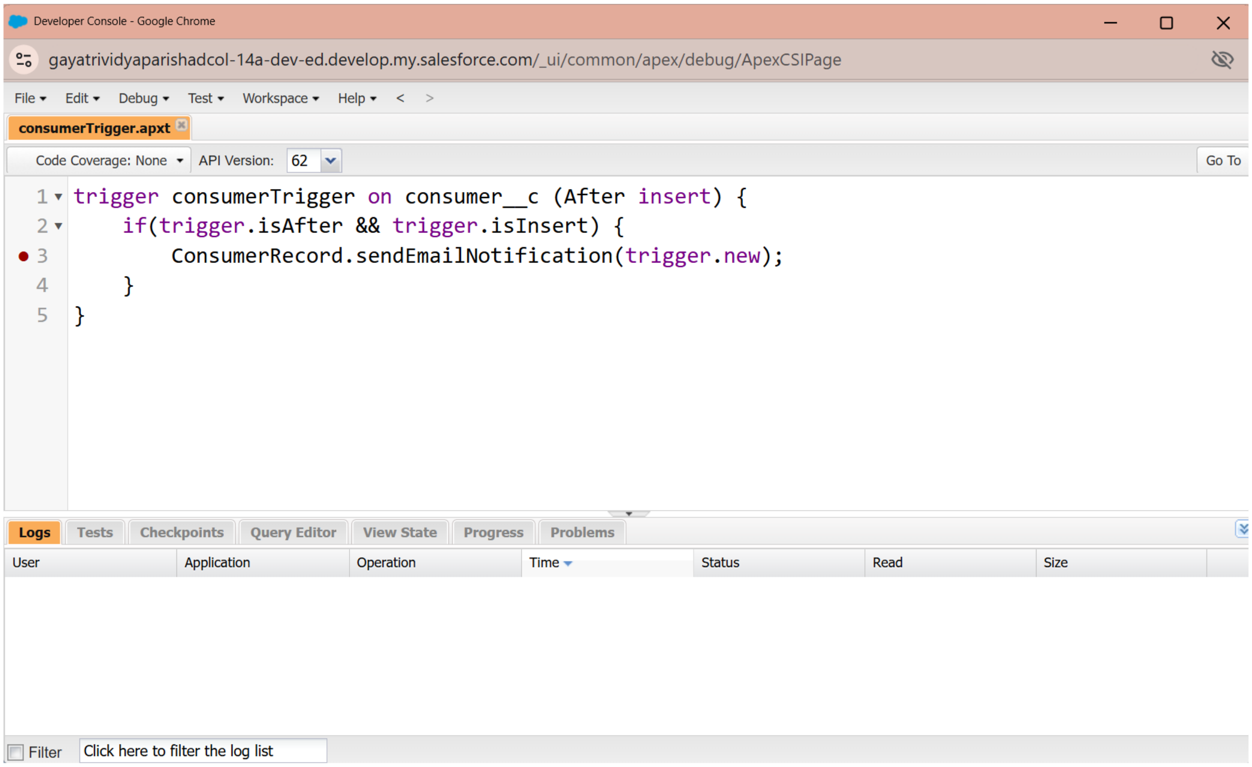
- While still in the trailhead account, navigate to the gear icon in the top right corner.
- Click on developer console and you will be navigated to a new console window.
- Click on the File menu in the toolbar, and click on new? Trigger.
- Enter the trigger name and the object to be triggered.

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
trigger consumerTrigger on consumer__c (After insert) {
    if(trigger.isAfter && trigger.isInsert) {
        ConsumerRecord.sendEmailNotification(trigger.new);
    }
}
Logs
Tests
Checkpoints
Query Editor
View State
Progress
Problems
User
Application
Operation
Time
Status
Read
Size
Filter
Click here to filter the log list