

PROJECT REPORT

ON

A CRM APPLICATION FOR

WHOLESALE RICE MILL

BY

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DESCRIPTION

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

INTRODUCTION TO SALESFORCE

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

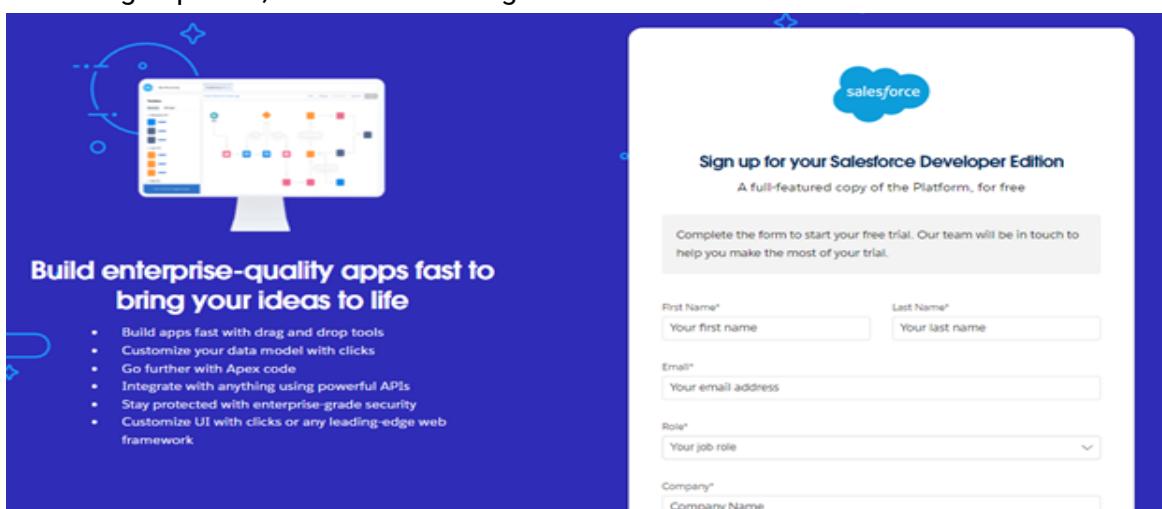
Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

Activity 1: Creating Developer Account:

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>

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 :

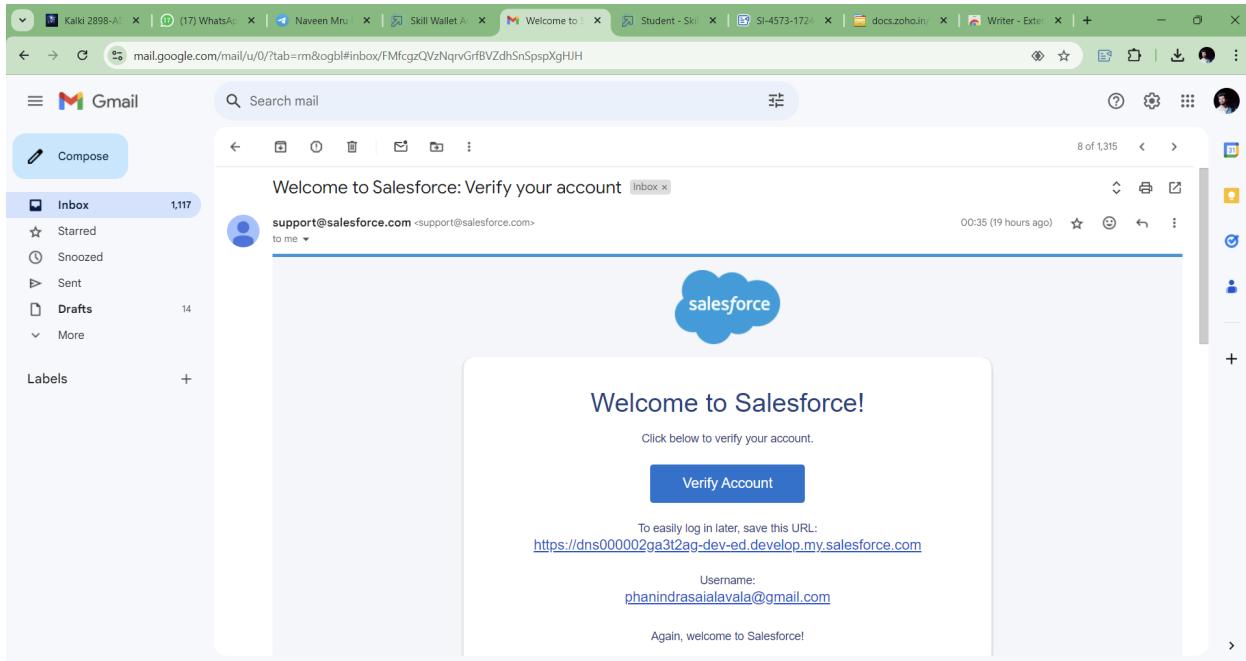
username@organization.com

USERNAME : phanindrasaialaval@gmail.com

Click on sign me up after filling these.

Activity 2: Account Activation:

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



3. Give a password and answer a security question and click on change password.

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

OBJECT

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

Salesforce objects are of two types:

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

To Navigate to Setup page:

Click on gear icon → click setup.

To create an object:

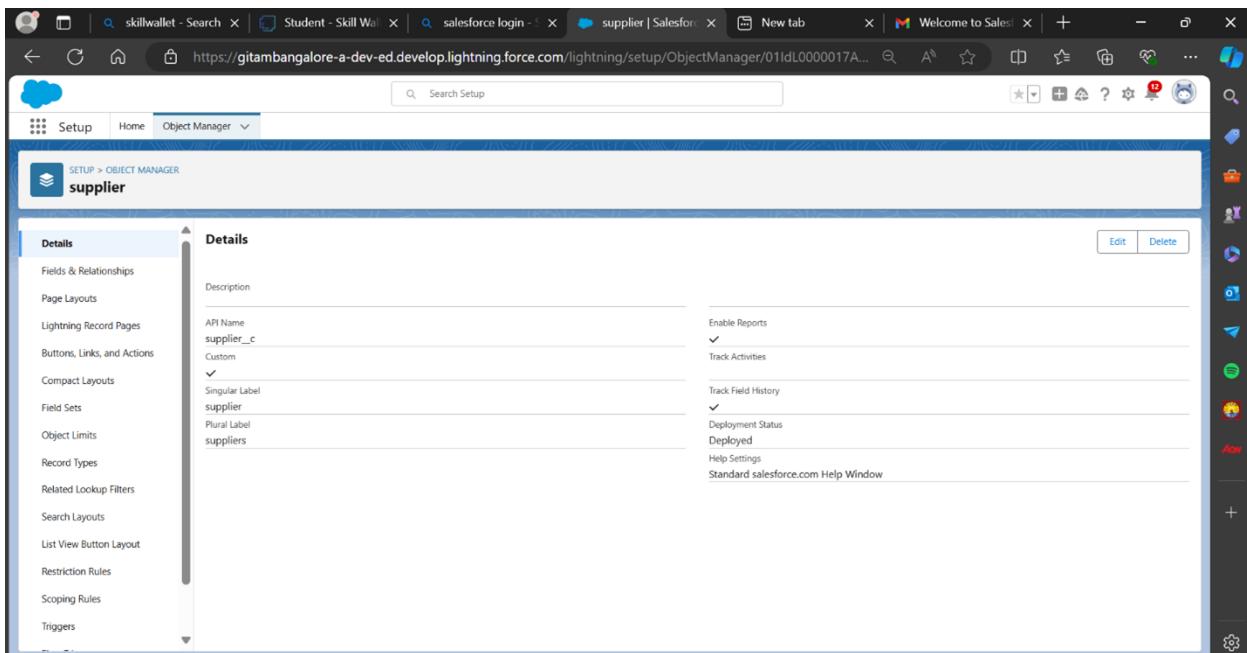
1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
2. On Custom object defining page:
3. Enter the label name, plural label name, click on Allow reports, Allow search.

Click on Save.

Activity 1: Create Supplier Object:

To create an object:

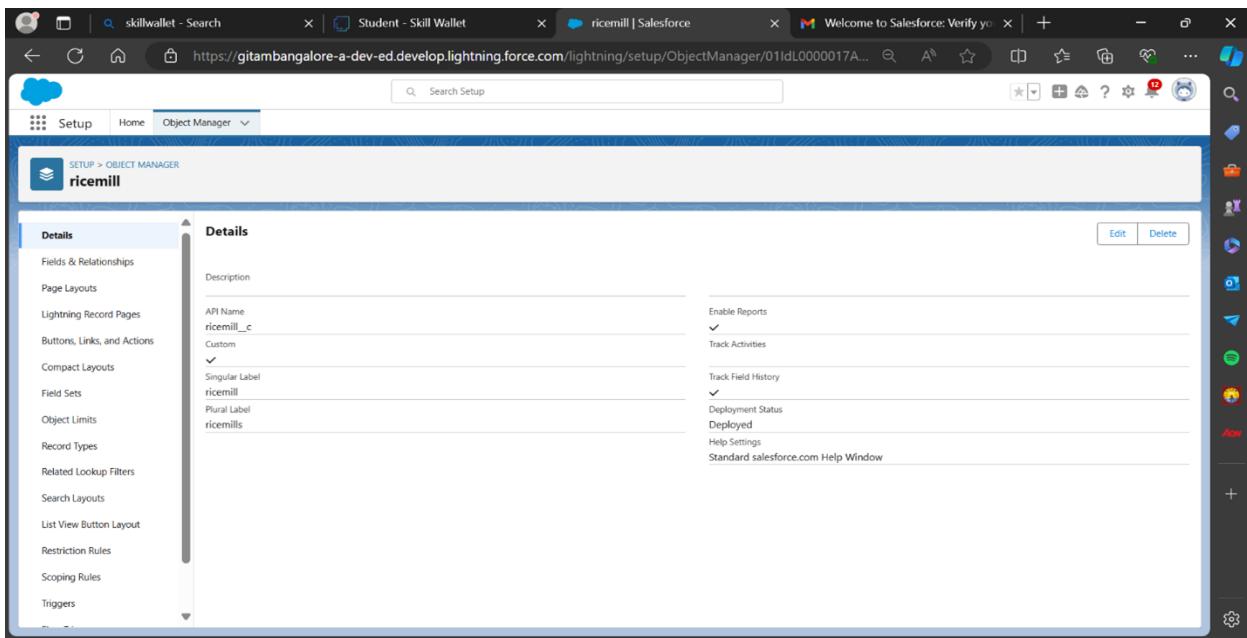
1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
2. Enter the label name → **supplier**
3. Plural label name → supplier
4. Enter Record Name Label and Format
5. Record Name → supplier Name
6. Data Type → Text
7. Click on Allow reports and Track Field History and allow search
8. Allow search → **Save.**



Activity 2: Create Rice mill Object:

To create an object:

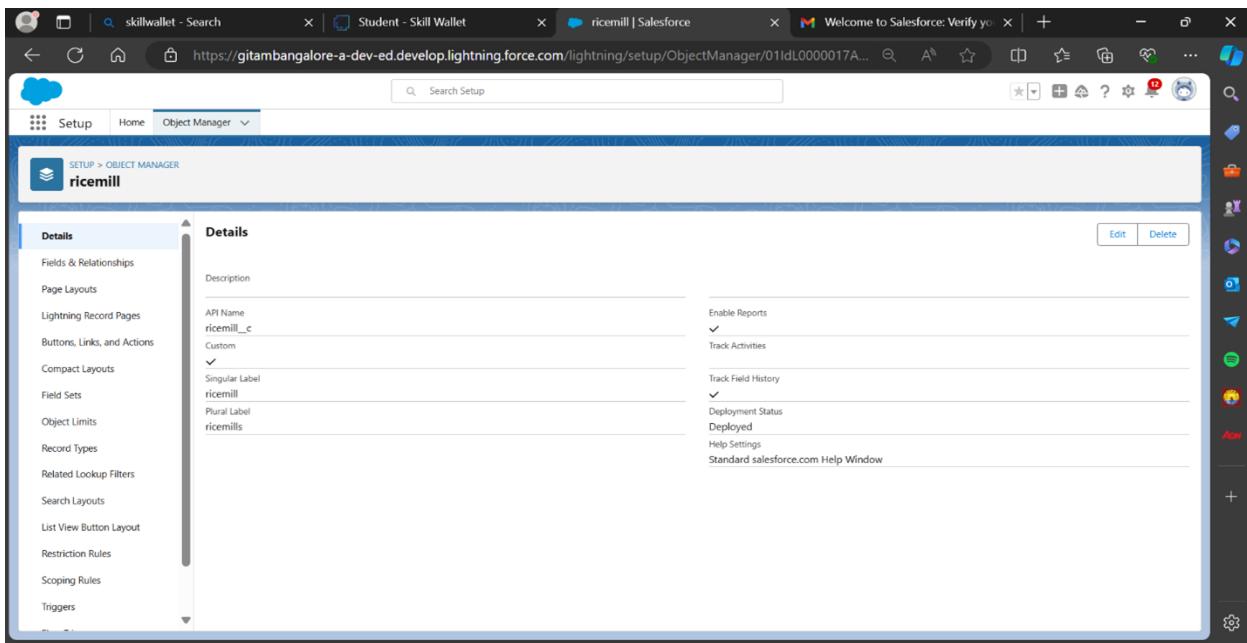
1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
2. Enter the label name → rice mill
3. Plural label name → rice mills
4. Enter Record Name Label and Format
5. Record Name →
6. Data Type → Auto Number
7. Display Format → rice-{000},Starting number → 1
8. Click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



Activity 3: Create consumer Objects:

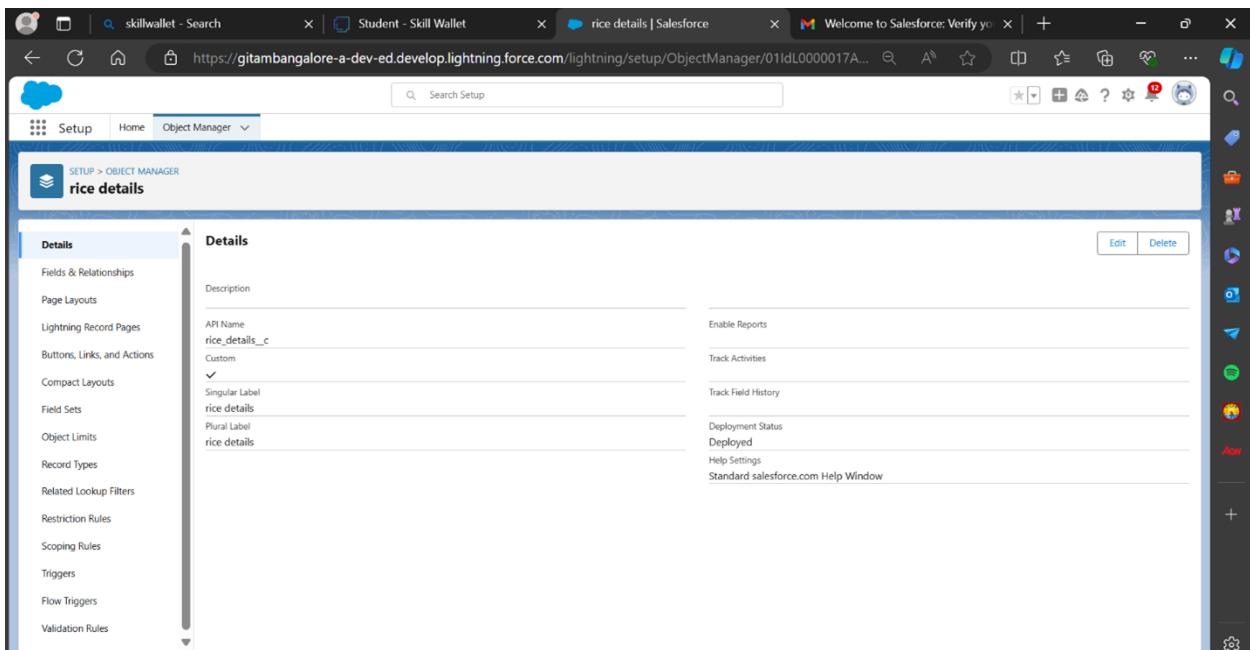
Note: Follow the same steps as mentioned in Activity 2 for the **Consumer** and **Receipt** objects.

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



Activity 4: Create rice details Objects:

1. Use these display format for the rice details
 1. label name → rice details
 2. Plural label name → rice details
 3. Display Format → rice-{000}
 4. Starting number → 1



TABS

A tab is like a user interface that is used to build records for objects and to view the

records in the objects.

Activity 1: Creating a Custom Tab

To create a Tab:(supplier)

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

Activity 2: Creating Remaining Tabs

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

The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page open. The left sidebar shows 'User Interface' and 'Tabs' selected. The main area displays a table for 'Custom Object Tabs' with four entries:

Action	Label	Tab Style	Description
Edit Del	consumers	Can	
Edit Del	rice details	Books	
Edit Del	ricemill	Back	
Edit Del	suppliers	Airplane	

Below this are sections for 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs', each with a note indicating no items have been defined. A 'Stay ahead of incidents' sidebar is visible on the right.

THE LIGHTNING APP

An app is a collection of items that work together to serve a particular function. In

Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

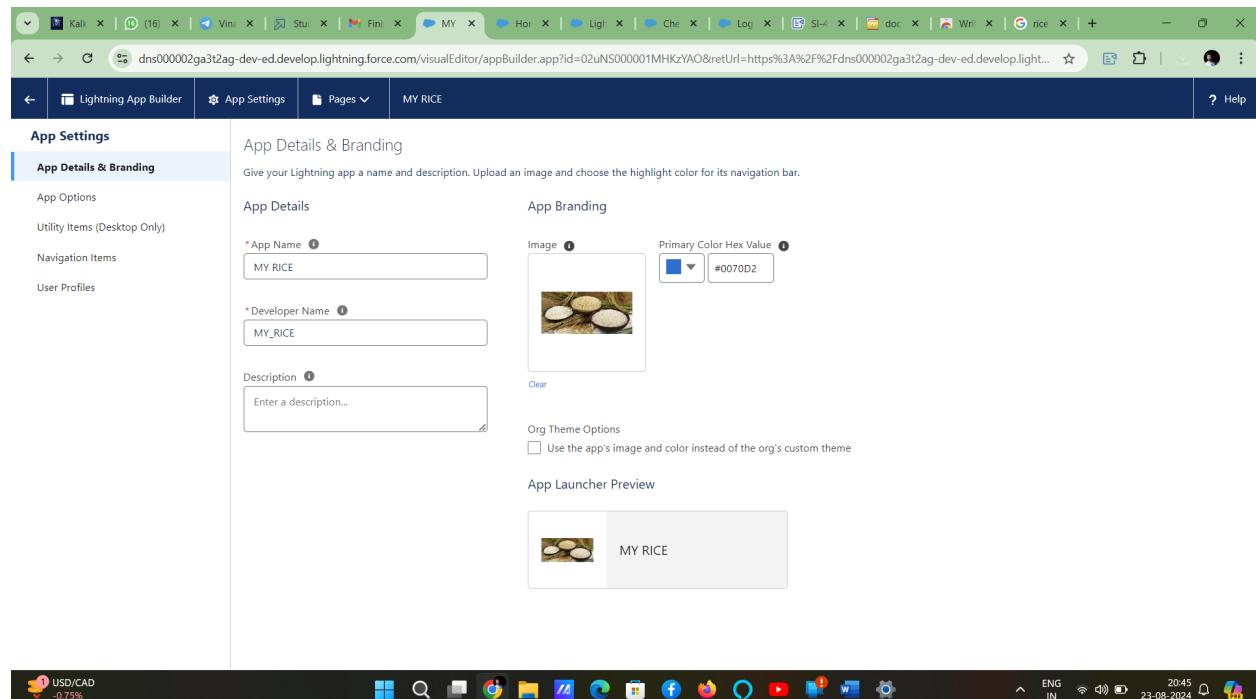
Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

Activity 1: Create a Lightning App

To create a lightning app page:

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

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



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

4.To Add Navigation Items:

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

The screenshot shows the 'Navigation Items' section of the Lightning App Builder. On the left, there's a sidebar with 'App Settings' and 'Utility Items (Desktop Only)' sections, and a 'User Profiles' section which is currently selected. The main area is titled 'Navigation Items' with a sub-instruction: '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.' Below this, there are two columns: 'Available Items' and 'Selected Items'. The 'Available Items' column contains a list of various Salesforce objects and features like Accounts, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations, Approval Requests, Asset Action Sources, Asset Actions, Asset State Periods, and Assets. The 'Selected Items' column contains four items: 'suppliers', 'ricemills', 'rice details', and 'consumers'. There are also up and down arrows to rearrange the selected items.

5. To Add User Profiles:

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

The screenshot shows the 'User Profiles' section of the Lightning App Builder. The sidebar shows 'App Settings' and 'Utility Items (Desktop Only)' sections, and the 'User Profiles' section is selected. The main area is titled 'User Profiles' with a sub-instruction: 'Choose the user profiles that can access this app.' Below this, there are two columns: 'Available Profiles' and 'Selected Profiles'. The 'Available Profiles' column lists numerous user profiles including Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, B2B Reordering Portal Buyer Profile, Contract Manager, Custom: Marketing Profile, Custom: Sales Profile, Custom: Support Profile, Customer Community Login User, Customer Community Plus Login User, Customer Community Plus User, and Customer Community User. The 'Selected Profiles' column contains two profiles: 'System Administrator' and 'worker'. There are also up and down arrows to rearrange the selected profiles.

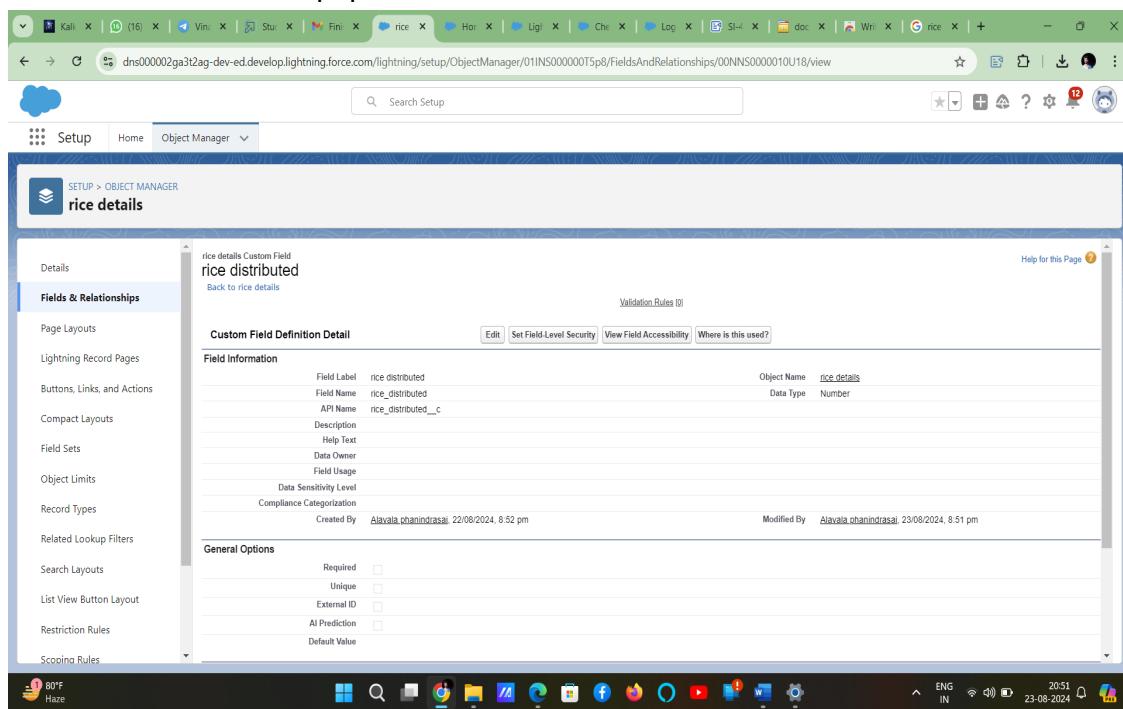
FIELDS

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.

Activity 1: Creating the number field in rice details object

Creating the number field in rice details object

1. Go to the setup page → click on object manager → From drop down click edit for rice details object.
1. Click on fields & relationship → click on New.
2. Select Data type as “Number” and click Next.
3. Given the Field Label as “rice distributed” and length as “5”.
4. Field Name will be auto populated, and click on Next → Next → Save.



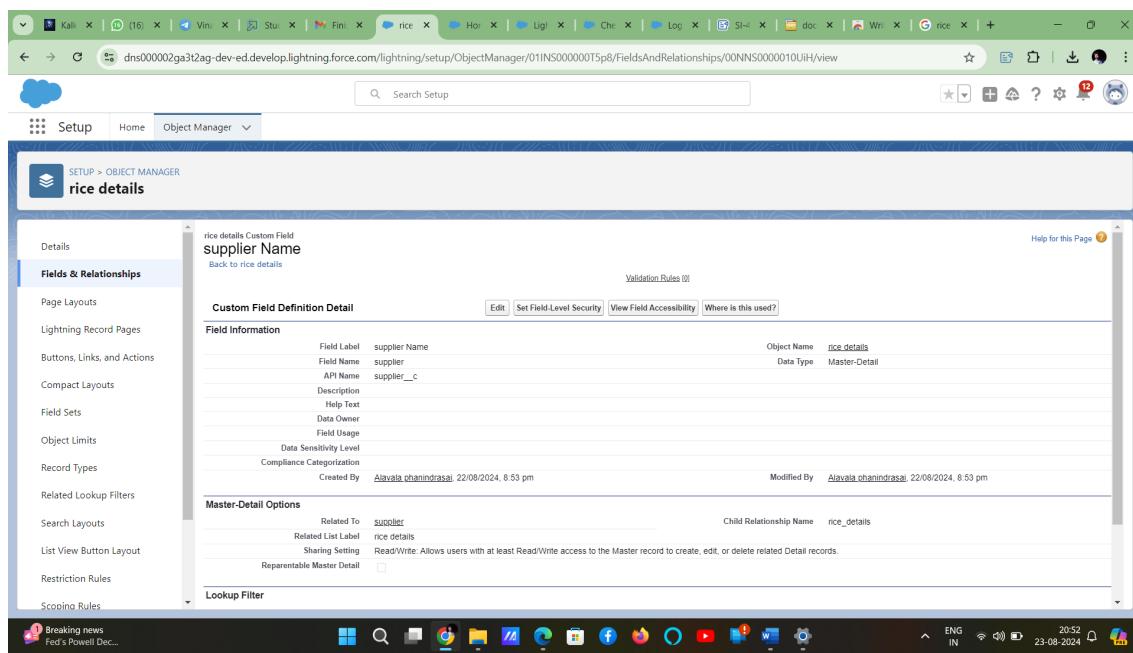
Activity 2 : Creating Junction Object :

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

Creating junction object as rice details with supplier & rice mill

To create junction object

1. Go to the setup page → click on object manager → From drop down click edit for rice details object.
1. Click on fields & relationship → click on New.
2. Select “Master-Detail relationship” as data type and click Next.
3. Select the related object “ supplier ” and click next.
4. Give Field Label as “supplier Name” and click Next.
5. Next → Next → Save & New.
6. Follow the same steps from 1 to 3.
7. Select the related object “ rice mill ” and click Next.
8. Give Field Label as “rice mill 1(one)” and click Next.
9. Next → Next → Save.



Activity 3 : Creating a Master-Detail Relationship

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

Creating Master-Detail Relationship between consumer & rice mill Object

To Create a Master-Detail relationship

1. Go to the setup page → click on object manager → From drop down click edit for consumer object.
2. Click on fields & relationship → click on New.
3. Select “Master-Detail relationship” as data type and click Next.

4. Select the related object “ rice mill”.
5. Give Field Label as “rice mill name” and click Next.
6. Next → Next → Save.

The screenshot shows the Salesforce Object Manager interface. A custom field named 'rice mill 1(one)' is being created for the 'rice details' object. The field's properties include:

- Field Information:**
 - Field Label: rice mill 1(one)
 - Field Name: rice_mill
 - API Name: rice_mill_c
 - Description: Help Text
 - Data Owner: Field Usage
 - Data Sensitivity Level: Compliance Categorization
 - Created By: Alavala phanindrasai 22/08/2024, 8:54 pm
 - Modified By: Alavala phanindrasai 22/08/2024, 8:54 pm
- Master-Detail Options:**
 - Related To: rice_mill
 - 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:

Activity 4 : Creating the Roll-up Summary

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

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

1. Go to setup → click on Object Manager → type object name(supplier) in search bar → click on the object.
2. Now click on “Fields & Relationships” → New
3. Select the data type as “Rollup summary ”,and click Next.
4. Give the Field label as “ sum of rice distributed ”,Field Name will be Auto generated, and click Next.
5. Select the summarized object as “ rice details ”.
6. Select the Rollup type as “sum”.
7. Select the field to aggregate as “ rice distributed ”, and click Next → Next → Save.
8. Follow the same steps for the rice mill Object from 1 to 3
9. Give the Field label as “ rice distributed to shops ”,Field Name will be Auto generated, and click Next.
10. Select the summarized object as “ rice details ”.

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

The screenshot shows the Salesforce setup interface for creating a custom field. The URL in the browser is dns000002ga3t2ag-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01INS00000T5SX/FieldsAndRelationships/00NNNS0000010Ugi/view.

Object Manager - supplier

Custom Field Definition Detail

Field Information

- Field Label: sum of rice distributed
- Field Name: sum_of_rice_distributed
- API Name: sum_of_rice_distributed_c
- Description:
- Help Text:
- Data Owner:
- Field Usage:
- Data Sensitivity Level:
- Compliance Categorization:
- Created By: Alavala chanindrasai 22/08/2024, 9:34 pm
- Modified By: Alavala chanindrasai 22/08/2024, 9:34 pm

Roll-Up Summary Options

- Data Type: Roll-Up Summary
- Summarized Object: rice_details
- Field to Aggregate: rice_details:rice_distributed
- Filter Criteria:
- Summary Type: SUM

Left Sidebar (Fields & Relationships)

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

supplier Custom Field
rice distributed to shops

Custom Field Definition Detail

Field Information		Object Name
Field Label	rice distributed to shops	supplier
Field Name	rice_distributed_to_shops	
API Name	rice_distributed_to_shops_c	
Description		
Help Text		
Data Owner		
Field Usage		
Data Sensitivity Level		
Compliance Categorization		
Created By	Alavala phanindrasai	22/08/2024, 9:35 pm
Modified By	Alavala phanindrasai	22/08/2024, 9:35 pm

Roll-Up Summary Options

Data Type	Summarized Object	Summary Type
Roll-Up Summary	rice_details	SUM
	rice_details.rice_distributed	
	Filter Criteria	

rice mill Custom Field
rice taken

Custom Field Definition Detail

Field Information		Object Name
Field Label	rice taken	rice mill
Field Name	rice_taken	
API Name	rice_taken_c	
Description		
Help Text		
Data Owner		
Field Usage		
Data Sensitivity Level		
Compliance Categorization		
Created By	Alavala phanindrasai	22/08/2024, 9:38 pm
Modified By	Alavala phanindrasai	22/08/2024, 9:38 pm

Roll-Up Summary Options

Data Type	Summarized Object	Summary Type
Roll-Up Summary	consumer	SUM
	consumer.rice_taken_by_shops_in_kgs	
	Filter Criteria	

Activity 5 : Creating Fields in Objects

Creating the number field in rice details object

1. Go to the setup page → click on object manager → From drop down click edit for rice details object.
2. Click on fields & relationship → click on New.
3. Select Data type as “Number” and click Next
4. Given the Field Label as “ supplier name ” and length as “ 5 ”.

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

The screenshot shows the Salesforce Object Manager Fields & Relationships page for the 'rice details' object. The left sidebar lists various layout types: Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area displays a table titled 'Fields & Relationships' with 7 items. The columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

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_c	Master-Detail(rice mill)		✓
rice price/kg	rice_price_kg_c	Number(5, 0)		
supplier Name	supplier_c	Master-Detail(supplier)		✓

Activity 6: Creating Fields in rice mill Objects

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

The screenshot shows the Salesforce Object Manager Fields & Relationships page for the 'rice mill' object. The left sidebar lists various layout types: Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area displays a table titled 'Fields & Relationships' with 6 items. The columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

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 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)		

Activity 7: Creating Fields in consumer Objects

The screenshot shows the Salesforce setup interface with the URL dns000002ga3t2ag-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01INS000000T5vZ/FieldsAndRelationships/view. The page title is "Fields & Relationships" under the "consumer" object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, etc. The main table displays the following fields:

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(100)		
Last Modified By	LastModifiedById	Lookup(User)		
Last name	Last_name__c	Text(100)		
Mode of payment	Mode_of_payment__c	Picklist		

Activity 8 : Creating Cross Object Formula Field in consumer Object

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

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

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

`rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c`

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

The screenshot shows the Salesforce Lightning Object Manager interface. The top navigation bar includes tabs like Page, Stud., Finis!, rang..., cons..., Check..., Logi..., SI-4..., docs..., Writ..., rice..., take..., and a search bar labeled 'Search Setup'. Below the header, the page title is 'SETUP > OBJECT MANAGER consumer'. On the left, a sidebar lists various setup options under 'Fields & Relationships': Details, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area displays the 'Amount Paid' custom field definition for the 'consumer' object. The 'Field Information' section shows the following details:

Field Label	Amount Paid
Field Name	Amount_Paid
API Name	Amount_Paid__c
Description	Rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	

Below this, the 'Formula Options' section shows:

Data Type	Formula
Decimal Places	2

At the bottom of the page, there are buttons for Edit, Set Field-Level Security, View Field Accessibility, Where is this used?, and Help for this Page. The status bar at the bottom shows the date and time as 23/08/2024 12:10 am.

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

1. Go to setup → click on Object Manager → type object name(consumer) in search bar → click on the object.
2. Click on fields & relationship → click on New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Consumer Name" and select formula return type as "TEXT" and click next.
5. Insert field formula should be : First_Name__c + '' + Last_Name__c
6. click "Check Syntax" and Save.

The screenshot shows the Salesforce Object Manager interface. A custom field named 'Consumer Name' has been created for the 'consumer' object. The field is of type 'Formula' with the formula 'First_name__c + ' ' + Last_name__c'. The 'Field Information' section includes details like Field Label ('Consumer Name'), Field Name ('Consumer_Name'), API Name ('Consumer_Name__c'), and Description ('Help Text'). The 'Formula Options' section shows the formula 'First_name__c + ' ' + Last_name__c'. The right side of the screen displays the 'Custom Field Definition Detail' page with tabs for Edit, Set Field-Level Security, View Field Accessibility, and Where is this used?.

Activity 9 : Creating the validation rule

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

Creating the validation rule for phone number field in consumer object

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

1. Go to the setup page → click on object manager → From drop down click edit for consumer object.
2. Click on the validation rule → click New.
3. Enter the Rule name as "Phonenumberoremailblankrule".
4. Enter the description as "phone number and email number should not be blank".
5. Enter the formula as "OR(ISBLANK(phone_number__c), ISBLANK(email__c))" and check the syntax.
6. Under the error message write as "please fill in your phone number."
7. Select error location "top of page".

8. Save the validation rule.

The screenshot shows the Salesforce Setup interface for the 'consumer' object. On the left, a sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area is titled 'consumer Validation Rule' and displays the 'Validation Rule Detail' for the 'consumer'. The rule is named 'Phonenumberoremailblankrule' and has the formula 'OR(ISBLANK(Phone_number__c), ISBLANK(email__c))'. It is active and located at the top of the page. The right side of the screen shows standard Salesforce navigation and status icons.

PAGE LAYOUTS

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

Activity 1 : creating the page layout

To Create a Page layout:

1. Go to Setup → Click on Object Manager → Search for the object (consumer) → From drop down select the object and click on it.
2. Click on Page layout → Click on New.
- 3.
4. Select the existing page layout, and give the page layout name as "consumer layout", and click save.
5. Drag and drop the section field to consumer details and create the section.
6. Enter the section name as "Personal details", → click Ok.
7. Now drag the fields to this section that mentioned , they are
8. First name , last name , consumer name , phone number, email, rice mill name.
9. Follow the same process for another two sections as shown above , they are
10. One section is " rice details " , drag the fields that are
11. Rice taken by shop, rice type.
12. Another section is "Receipt details ", and drag the fields that are

13. Mode of payment , Amount paid.

14. Then , Click save.

The screenshot shows the Salesforce Setup interface for managing object layouts. The left sidebar lists various layout types: Details, Fields & Relationships, Page Layouts (which is selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area displays the 'consumer Layout' configuration. It includes a 'Fields' section with a table showing field names like 'Consumer Name', 'Last Modified By', 'rice mill name', 'Created By', 'Last name', 'Rice taken by shops', 'Amount Paid', 'email', 'Mode of payment', 'rice taken by sho...', and 'consumer Name', 'First name', 'Phone number', 'Rice type'. Below this is a 'consumer Sample' section with three panels: 'Highlights Panel' (Customize the highlights panel for this page layout...), 'Quick Actions in the Salesforce Classic Publisher' (Actions in this section are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for the publisher on pages that use this layout.), and 'Salesforce Mobile and Lightning Experience Actions' (Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.).

PROFILES

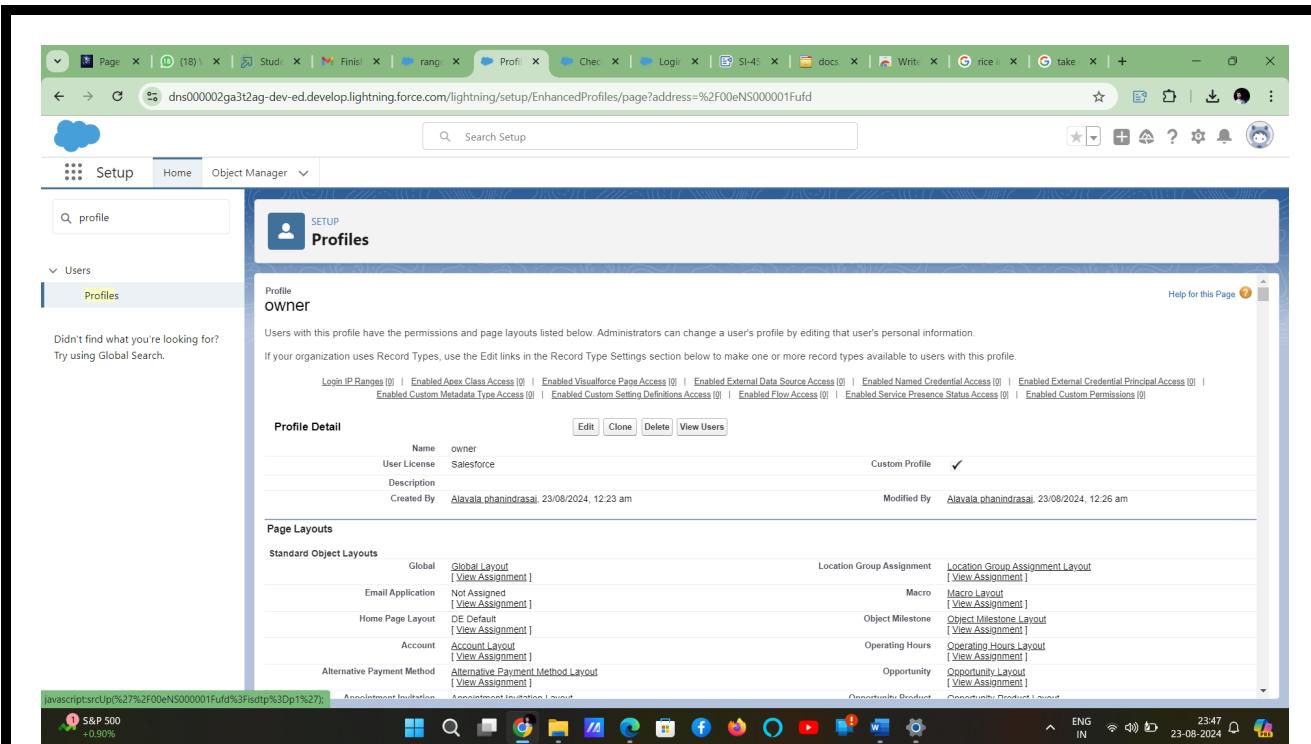
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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

Activity 1: owner Profile

To create a new profile:

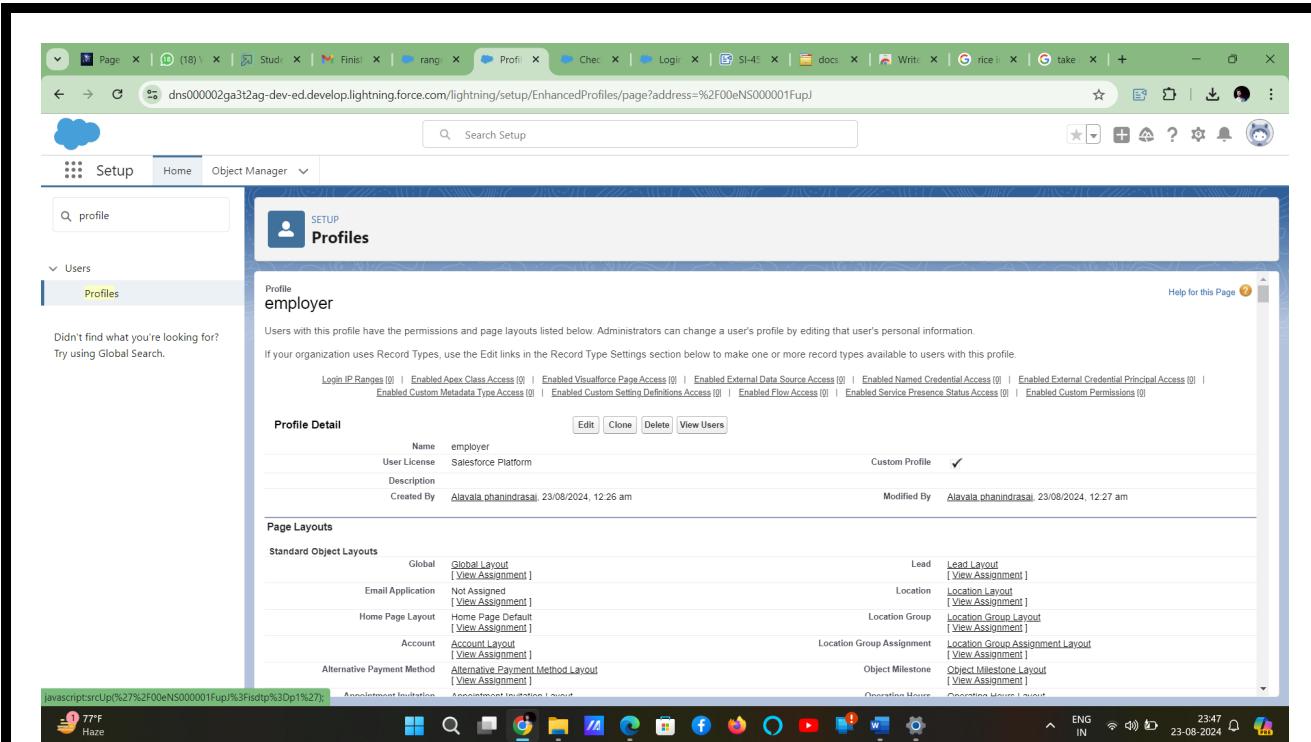
1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (Standard User) → enter profile name (owner) → Save.
1. Scroll down to Custom Object Permissions and Give access permissions for consumers, rice details , rice mill and suppliers objects as mentioned in the below diagram.

Give access and save it



Activity 2: employer Profile

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



Activity 3: worker Profile

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

Profile worker

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Principal Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail		Custom Profile	
Name	worker	Edit	✓
User License	Salesforce Platform	Clone	
Description		Delete	
Created By	Alayala phanindrasa [23/08/2024, 12:27 am]	Modified By	Alayala phanindrasa [23/08/2024, 12:28 am]

Page Layouts

Standard Object Layouts	Global	Lead
Email Application	Global Layout [View Assignment]	Not Assigned [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Location [View Assignment]
Account	Account Layout [View Assignment]	Location Group [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Object Milestone [View Assignment]
Announcement Notification	Announcement Notification [View Assignment]	Operating Hours [View Assignment]

ROLE & ROLE HIERARCHY

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

Activity 1: Creating owner Role

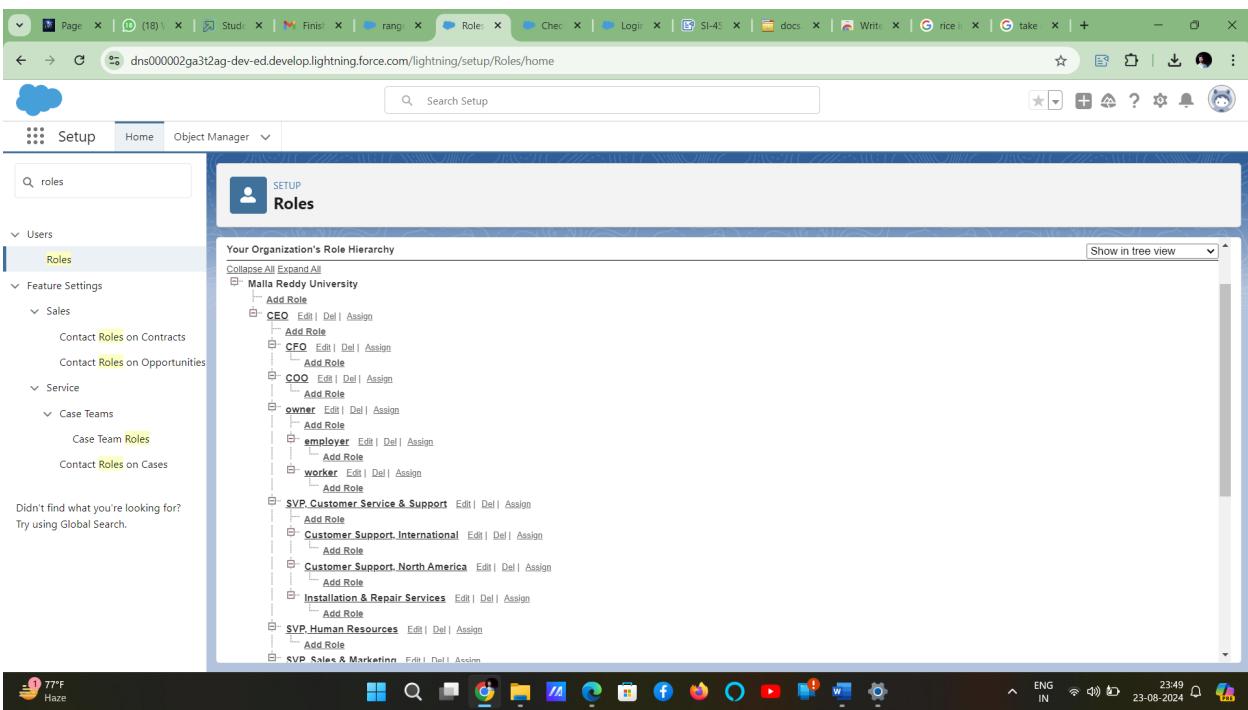
Creating owner Role:

1. Go to quick find → Search for Roles → click on set up roles.
1. Go to quick find → Search for Roles → click on set up roles.
2. Click on Expand All and click on add role under whom this role works.
3. Give Label as "owner" and Role name gets auto populated. Then click on Save.
4. Click and save it.

Activity 2: Creating employer roles

Creating another two roles under manager

1. Go to quick find → Search for Roles → click on set up roles.
2. Click plus on CEO role, and click add role under owner.
3. Give Label as "employer" and Role name gets auto populated. Then click on Save.
1. Repeat the same steps, for another role.
2. Click plus on CEO role, and click plus on owner, and click add role under employer. give Label as "worker" and Role name gets auto populated. Then click on Save.



USERS

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

Activity 1: Create User

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

Save it.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main content area displays the 'User Detail' page for a user named 'vicky y'. The page includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Federation ID, Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, and High-Contrast Palette on Charts. The 'Role' field is set to 'owner'. The 'User License' field is set to 'Salesforce'. The 'Profile' field is set to 'owner'. The 'Active' checkbox is checked. Other checkboxes for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, and High-Contrast Palette on Charts are all unchecked.

Activity 2: creating another users

1. Go to setup → type users in quick find box → select users → click New user.
2. Fill in the fields

First Name : ram
Last Name : ram
Alias : Give a Alias Name
Email id : Give your Personal Email id
Username : Username should be in this form: text@text.text
Nick Name : Give a Nickname
Role : employer
User license : Salesforce platform
Profiles : standard platform user.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main content area displays the 'User Detail' page for a user named 'ram ram'. The user's details include:

- Name: ram ram
- Alias: rram
- Email: phanindrasaijalavala@gmail.com [Verify]
- Username: alavalaphanindrasai@gmail.com
- Nickname: User17243535604011508134
- 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:

The 'Role' section shows 'Employee' selected. Other role checkboxes like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, and High-Contrast Palette on Charts are available but not selected.

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

User Detail

Name: ragu raj
Alias: rraj
Email: phanindrasaaiavalav@gmail.com [Verify]
Username: phanindrasaaiavalav@gmail.com
Nickname: User17243536480398403227
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: worker
User License: Salesforce Platform
Profile: Standard Platform User
Active:
Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
WDC User:
Site.com Publisher User:
Mobile Push Registrations: View
Data.com User Type:
Accessibility Mode (Classic Only):
Debug Mode:
High-Contrast Palette on Charts:

PERMISSION SETS

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

Activity 1: Creating OWD setting.

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

The screenshot shows the Salesforce Setup interface with the Sharing Settings page open. The left sidebar has a search bar and a 'Sharing Settings' section. The main area displays a table titled 'Sharing Settings' with columns for object name, sharing level, and a checkmark column. Most objects have 'Private' sharing, except for 'Shipping Carrier', 'Shipping Carrier Method', 'Streaming Channel', and 'Tableau Host Mapping', which are set to 'Public Read Only'. A note on the left says 'Didn't find what you're looking for? Try using Global Search.'

Object	Sharing Level	
Scorecard	Private	✓
Seller	Private	✓
Service Appointment	Public Read/Write	✓
Service Appointment Attendee	Private	✓
Service Contract	Private	✓
Service Resource	Public Read/Write	✓
Service Territory	Public Read/Write	✓
Shift	Private	✓
Shipment	Private	✓
Shipping Carrier	Public Read Only	✓
Shipping Carrier Method	Public Read Only	✓
Shipping Configuration Set	Public Read Only	✓
Streaming Channel	Public Read/Write	✓
Tableau Host Mapping	Public Read Only	✓
User Provisioning Request	Private	✓
Waitlist	Private	✓
Web Cart Document	Private	✓
Work Order	Private	✓
Work Plan	Private	✓
Work Plan Template	Private	✓
Work Step Template	Private	✓

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

The screenshot shows the Salesforce consumer_c list view. The top navigation bar includes tabs for 'supplier', 'rice mills', 'consumers' (which is selected), and 'rice details'. The main area displays a table titled 'Recently Viewed' with 10 items. Each item is a consumer record with a checkbox and a dropdown menu. The table has columns for consumer name and a dropdown menu. The bottom status bar shows system information like battery level, signal strength, and date.

REPORTS

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the

resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

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

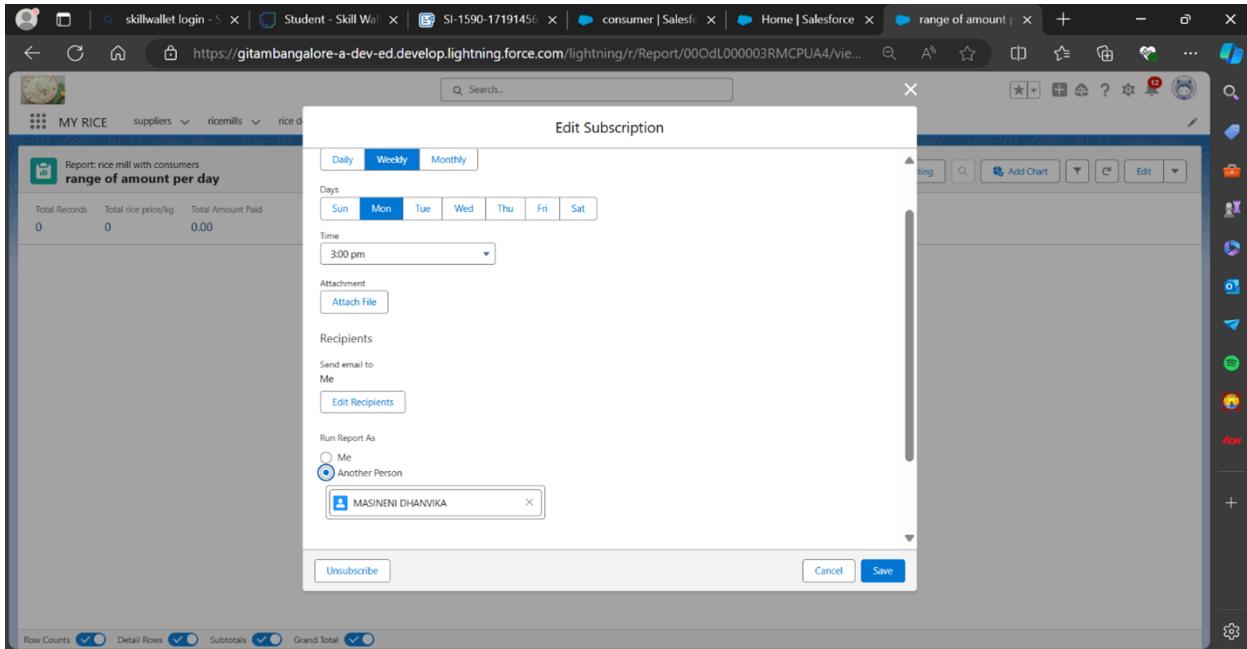
Activity 1: Create Report

1. Go to the app → click on the reports tab
2. Click New Report.
3. select for report type, search for “rice mill with consumers” click on it. And click on start report.
4. Their outline pane is opened already, select the fields that are mentioned below in the column section.
 5. 1.consumer name
 6. 2.rice type
 7. 3.rice price/kg
 8. 4.mode of payments
 9. 5.amount paid
10. Remove the unnecessary fields
11. Select the fields that are mentioned below in the GROUP ROWS section.
 - a. Rice taken by shops.
12. Click save and run and save the report as “range of amount per day”.and save it.

Rice taken by shops	consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
Subtotal	1,800				0.00
Subtotal	consumers-001	1.basmati	200	UPI	600.00
Total (10)			2,000		600.00

Activity 2: Sharing report to owner

1. Click edit drop down and select subscribe option
2. After selecting the run report as a “another person” select your personal account or whom you want to send that mail to.
3. Click save.



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

Activity 3: create a report folder

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

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

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

The screenshot shows the Salesforce Lightning interface with the URL <https://gitambangalore-a-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=u...>. The page title is "Reports | Salesforce". The top navigation bar includes links for "Inbox (9,291) - dhanvikam3108@gmail.com", "Student - Skill Wallet", and "Reports | Salesforce". The main content area is titled "All Folders" under "Reports". On the left, there's a sidebar with sections for "REPORTS" (Recent, Created by Me, Private Reports, Public Reports, All Reports) and "FOLDERS" (All Folders). The main table lists reports with columns for Name, Created By, Created On, Last Modified By, and Last Modified On. One report, "estimated rice per day", has a context menu open, with the "Favorite" option highlighted. Other options in the menu include Share, Rename, and Delete.

Name	Created By	Created On	Last Modified By	Last Modified On
Reports Summer '22	Automated Process	23/6/2024, 3:23 pm	Automated Process	23/6/2024, 3:23 pm
Einstein Bot Reports Winter '23	Automated Process	23/6/2024, 3:23 pm	Automated Process	23/6/2024, 3:23 pm
Enablement Dashboard Reports Spring '24	Automated Process	23/6/2024, 3:23 pm	Automated Process	23/6/2024, 3:23 pm
Enablement Dashboard Reports Summer '24	Automated Process	23/6/2024, 3:57 pm	Automated Process	23/6/2024, 3:57 pm
estimated rice per day	MASINENI DHANVIKA	24/6/2024, 3:40 pm	MASINENI DHANVIKA	24/6/2024, 3:40 pm

DASHBOARDS

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

Activity 1: Create Dashboard Folder

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

Activity 2: Create Dashboard

1. Go to the app → click on the Dashboards tabs.
 1. Give a Name and select the folder that was created, and click on create.
 1. Select add component.
 1. Select a Report and click on select.

Display as- vertical bar chart

X-axis - rice taken by shops

Y-axis- sum of amount

Y-axis range - automatic

Sort by - rice taken by shops

Component theme - dark.

Add the component

Again select add component with above same steps

- 1.display as donut chart
- 2.sort by - sum of amount

3.title-range of amount per day

4.component theme dark

Click add.

Click save and done.

