

A CRM APPLICATION FOR WHOLESALE RICE MILL

Category: Salesforce

Skills Required:

Salesforce Admin

Project 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.

Features and Functionality:

Reporting and Dashboards: The application can generate detailed reports and analytics regarding daily how much rice sold and total income per daily, revenue generated, popular amenities, and most buyed customers. Easy to understand the data to the owner, improving resource allocation, and planning future development.

Introduction to Salesforce

Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?".

What Is Salesforce?

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

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

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

<https://youtu.be/r9EX3IGde5k>

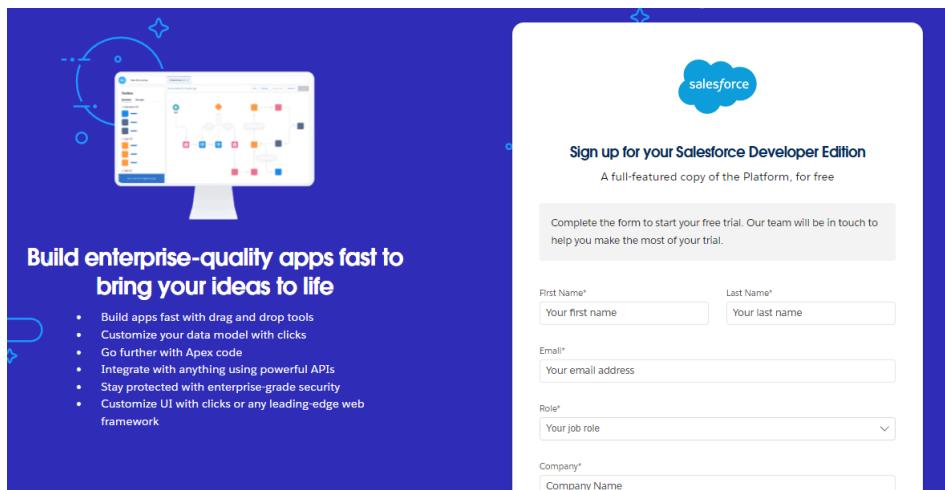
Creating Developer Account:

Duration: 1 Hrs

Skill Tags:

Creating a developer org in salesforce.

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



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

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

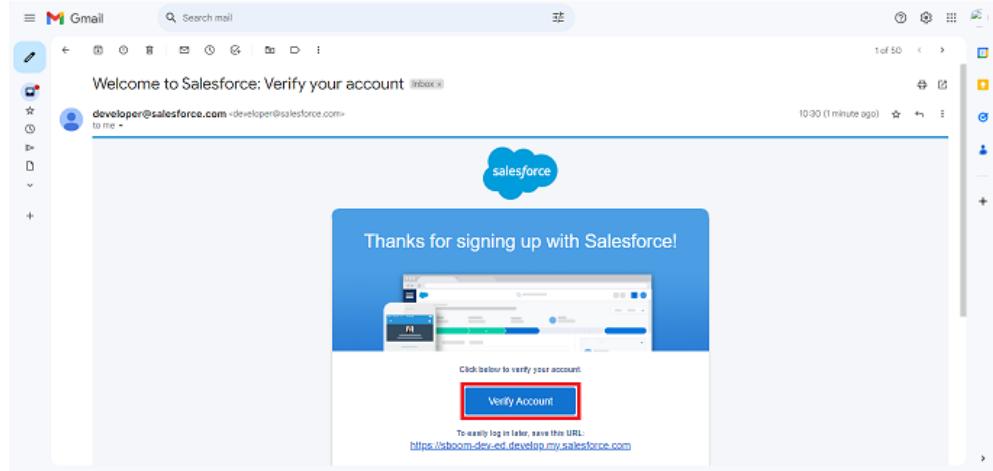
Click on sign me up after filling these.

Account Activation

Duration: 1 Hrs

Skill Tags:

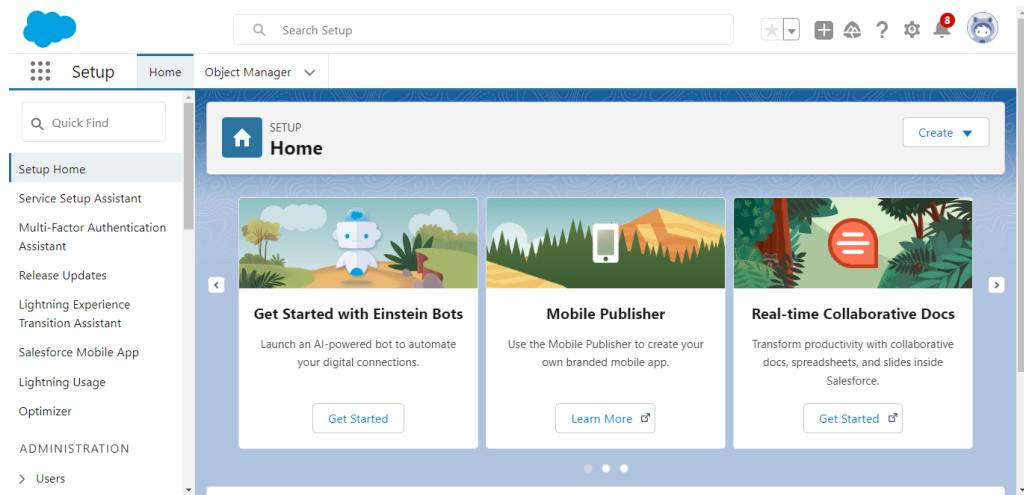
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



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

A screenshot of a "Change Your Password" page. The title is "Change Your Password". It says "Enter a new password for lead@sb.com. Make sure to include at least: 8 characters, 1 letter, 1 number". There are two input fields: "New Password" and "Confirm New Password", both with red borders. Below them is a "Security Question" field with the question "In what city were you born?". Underneath is an "Answer" field containing "asdfghjkl". At the bottom is a large blue "Change Password" button, also with a red border.

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



Object

What Is an Object?

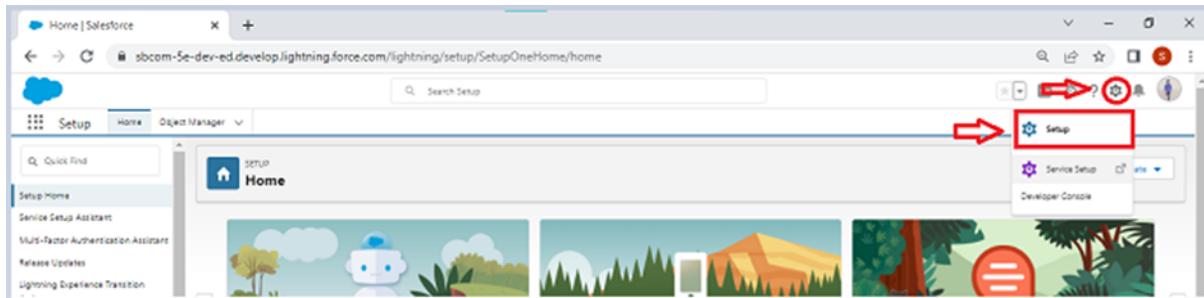
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

Salesforce objects are of two types:

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

To Navigate to Setup page:

Click on gear icon -click setup.



To create an object:

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



- On Custom object defining page:

- Enter the label name, plural label name, click on Allow reports, Allow search.

Optional Features

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

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

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

Deployment Status

- In Development
- Deployed

Search Status

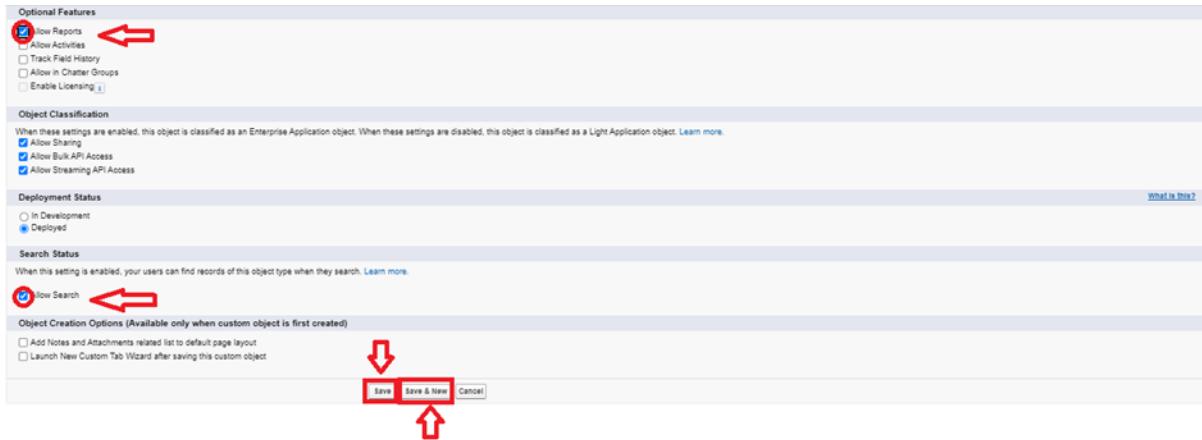
When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

- Allow Search

Object Creation Options (Available only when custom object is first created)

- Add Notes and Attachments related list to default page layout
- Launch New Custom Tab Wizard after saving this custom object

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



4. Click onSave.

Create Supplier Object

Duration: 1 Hrs

Skill Tags:

To create an object:

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

Create Rice mill Object

Duration: 1 Hrs

Skill Tags:

To create an object:

1. From the setup page >> Click on Object Manager>>Click on Create >> Click on Custom Object.
1. Enter the label name>>rice mill
2. Plural label name>> rice mills
3. Enter Record Name Label and Format
 - Record Name >>

- Data Type >> Auto Number
 - Display Format >> rice-{000}
 - Starting number >> 1
2. Click on Allow reports and Track Field History, Allow Search and Save.

Create consumer Objects

Duration: 1 Hrs

Skill Tags:

Note:Follow the same steps as mentioned in Activity 2 for theand Receipt objects.

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

Create rice details Objects

Duration: 1 Hrs

Skill Tags:

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

Tabs

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

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

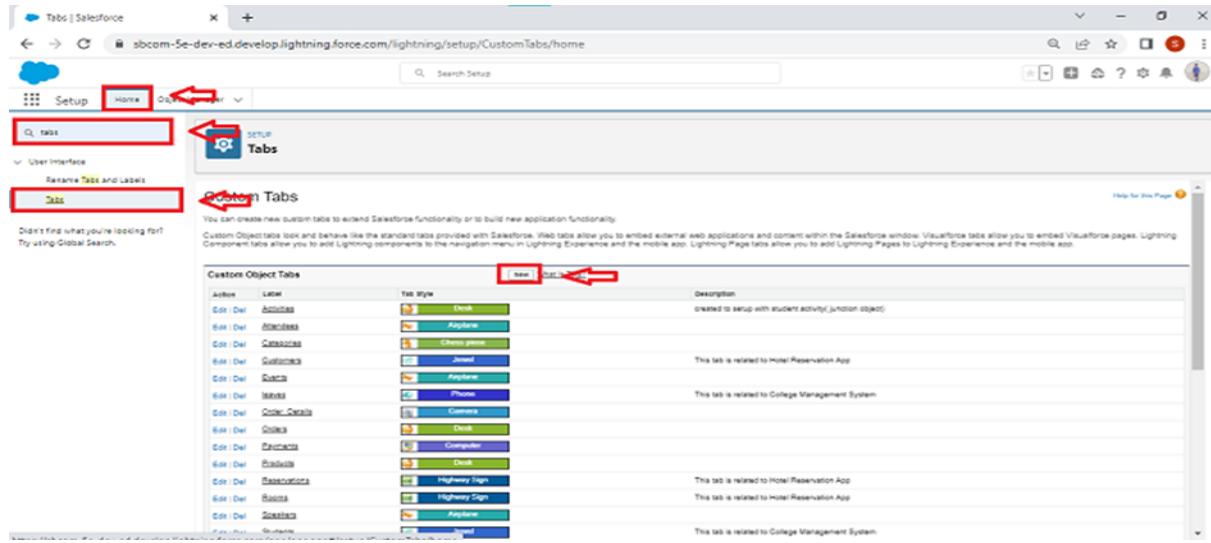
Creating a Custom Tab

Duration: 1 Hrs

Skill Tags:

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.

Edit Custom Object Tab
suppliers

Fill in the fields below to define the custom tab.

Custom Tab Definition Edit

Custom Object Tab Information | = Required Information

Tab Label	suppliers
Object	supplier
Tab Style	Box

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

Enter a short description.



Step 3. Add to Custom Apps Step 3 of 3

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	<input type="checkbox"/> Include Tab
Platform (standard_Platform)	<input type="checkbox"/>
Sales (standard_Sales)	<input type="checkbox"/>
Service (standard_Service)	<input type="checkbox"/>
Marketing (standard_Marketing)	<input type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>

Step 3. Add to Custom Apps Step 3 of 3

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	<input type="checkbox"/> Include Tab
Platform (standard_Platform)	<input type="checkbox"/>
Sales (standard_Sales)	<input type="checkbox"/>
Service (standard_Service)	<input type="checkbox"/>
Marketing (standard_Marketing)	<input type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>

Creating Remaining Tabs

Duration: 2 Hrs

Skill Tags:

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

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.

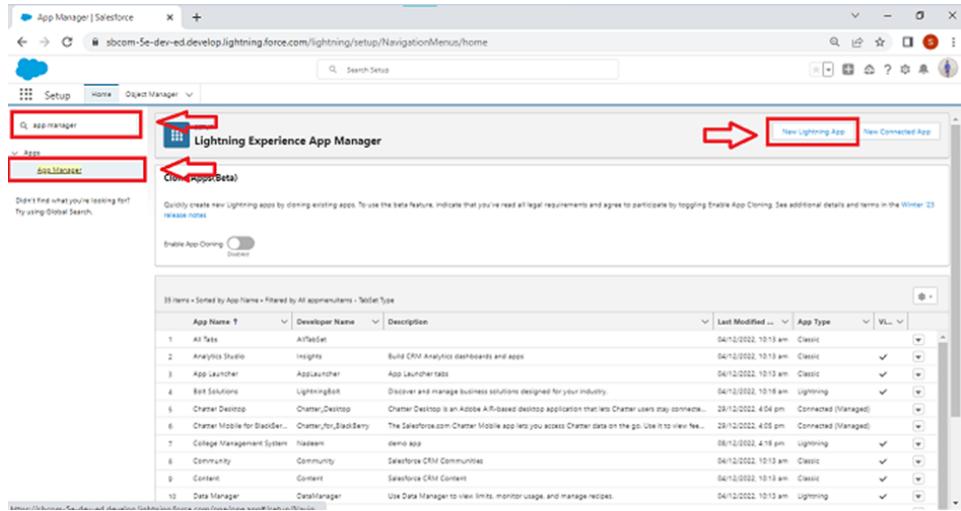
Create a Lightning App

Duration: 1 Hrs

Skill Tags:

To create a lightning app page:

1. Go to setup page >> search "app manager" in quick find >> select "app manager" >> click on New lightning App.



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

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

Name your app...

Developer Name

Description

App Branding

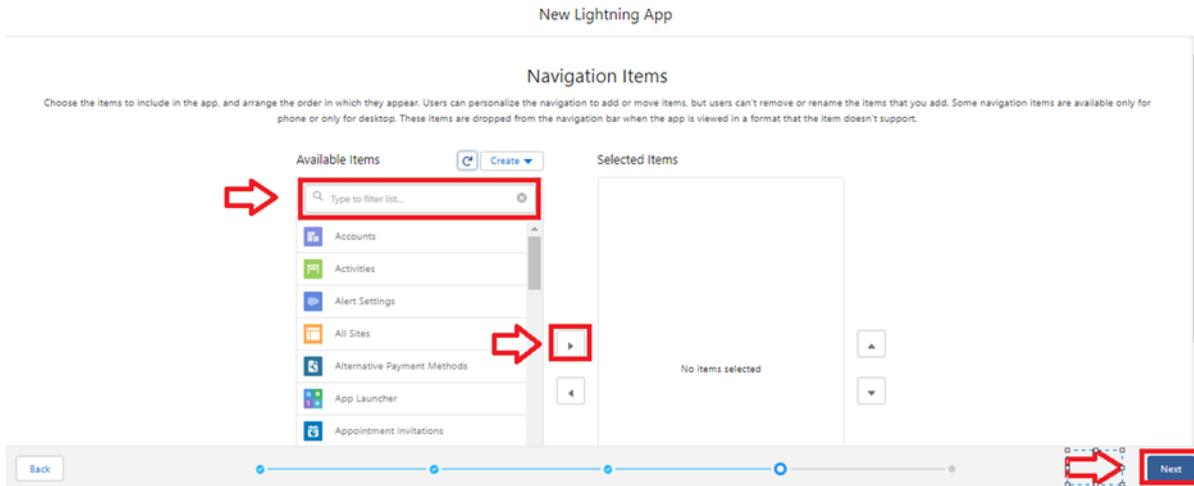
Image Primary Color Hex Value

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

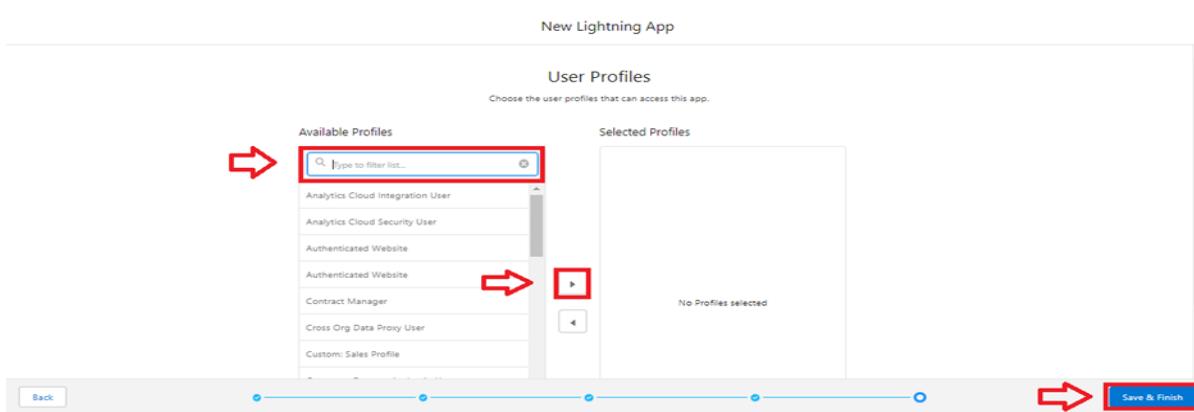
App Launcher Preview

Next

- 3.
4. Upload a photo that is related to your app.
5. To add Navigation Item:



2. Select the items (supplier, rice mill, consumer, Rice details) from the search bar and move it using the arrow button >> Next.
- 3.
4. To Add User Profiles:



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

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 an 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 organization 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.

Creating the number field in rice details object

Duration: 1 Hrs

Skill Tags:

Creating the number field in rice details object

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

The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with 'Setup' and 'Object Manager'. A red arrow points to the 'Object Manager' button. Below the navigation bar, the title 'Object Manager' is displayed with a subtitle '2 items, Sorted by Label'. A red arrow points to the search bar containing the text 'Student'. Another red arrow points to the 'Create' button. The main area is a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. There are two rows: one for 'Student' (Custom Object, College Management System) and one for 'Student_Activity' (Custom Object, created for the purpose of junction object). The 'Create' button is located at the bottom right of the table.

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

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

Field Label	rice distributed
Length	18
Field Name	
Description	
Help Text	
Required	<input type="checkbox"/> Always require a value in this field in order to save a record
Unique	<input type="checkbox"/> Do not allow duplicate values
External ID	<input type="checkbox"/> Set this field as the unique record identifier from an external system
AI Prediction	<input type="checkbox"/> Use this field to store AI prediction scores
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity

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

Creating Junction Object

Duration: 1 Hrs

Skill Tags:

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

The screenshot shows the Salesforce Object Manager. A red box highlights the 'Object Manager' button in the top navigation bar. Another red box highlights the 'Student' search bar. A third red box highlights the 'Owner' column in the table.

Label	API Name	Type	Description	Last Modified	Deployed
Student	Student	Custom Object	College Management System	18/12/2022	✓
Student Activity	Student_Activity__c	Custom Object	created for the purpose of junction object	08/01/2023	✓

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

The screenshot shows the 'Fields & Relationships' section of the Supplier object setup. A red box highlights the 'Fields & Relationships' tab in the sidebar. Another red box highlights the 'New' button at the top right of the list table. A third red box highlights the 'FIELD LABEL' column header.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Sum of Fuel supplied	Sum_of_Fuel_supplied__c	Roll-Up Summary (SUM Fuel details)		
supplier Name	Name	Text(80)		✓

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

The screenshot shows the 'Data Type' selection screen. A red box highlights the 'Master-Detail Relationship' option. A green arrow points to the 'Next' button at the top right.

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

Data Type

None Selected Select one of the data types below.

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

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

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

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

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

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

4. Select the related object " supplier " and click next.



5. Give Field Label as "supplier Name" and click Next.
6. Next >> Next >> Save & New.

7. Follow the same steps from 1 to 3.
8. Select the related object " rice mill " and click Next.
9. Give Field Label as "rice mill 1(one)" and click Next.
10. Next >> Next >> Save.

Creating a Master-Detail Relationship

Duration: 1 Hrs

Skill Tags:

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.

Creating the Roll-up Summary

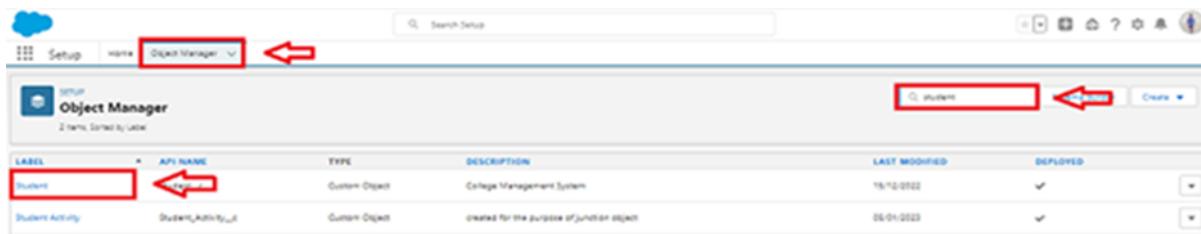
Duration: 1 Hrs

Skill Tags:

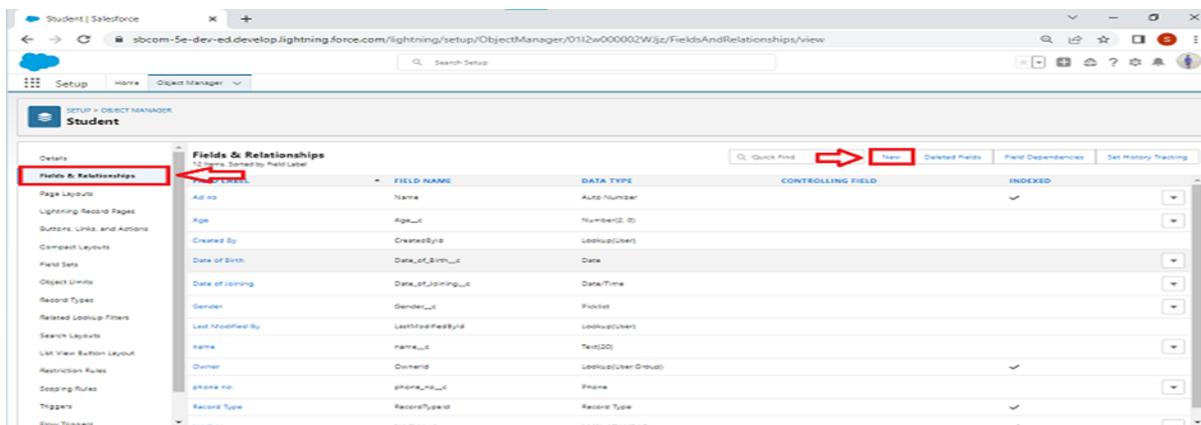
A rollup summary field is a field that summarizes data from a child object to a parent object that shares a master-detail relationship. Rollup summary fields can use the COUNT, SUM, MIN, and MAX functions. For example, you could use a rollup summary field to display the total value (amount of rice supplied)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

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

Data Type

None Selected Select one of the data types below.

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

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

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

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

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

- The relationship field is required on all detail records.

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

seller
New Custom Field

Step 2. Enter the details Step 2 of 5

Field Label

Field Name

Description

Help Text

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

Previous Next Cancel

5. 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.

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize

Master Object seller
Summarized Object

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate

Filter Criteria

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

Previous Next Cancel

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

Creating Fields in Objects

Duration: 1 Hrs

Skill Tags:

Creating the number field in rice details object

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

The screenshot shows the Salesforce Object Manager for the 'Supplier' object. The left sidebar lists various setup categories like Details, Page Layouts, Lightning Record Pages, etc. The 'Fields & Relationships' tab is selected and highlighted with a red box. The main area displays a table titled 'Fields & Relationships' with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table contains five rows of data. At the top right of the table, there is a 'New' button, which is also highlighted with a red box. Other buttons in the header include 'Quick Find', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Sum of Fuel supplied	Sum_of_Fuel_supplied__c	Roll-Up Summary (SUM Fuel details)		
supplier Name	Name	Text(80)	✓	▼

3. Select Data type as "master detail" and click Next.
4. Given the Field Label as " supplier name " and length as " 5

Step 2. Enter the details Step 2 of 4

Field Label 18

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

Length 18 Number of digits to the left of the decimal point

Decimal Places 0 Number of digits to the right of the decimal point

Field Name

Description

Help Text

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

Unique Do not allow duplicate values

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

AI Prediction Use this field to store AI prediction scores

Auto add to custom report type Add this field to existing custom report types that contain this entity 18

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

Creating Fields in rice mill Objects

Duration: 1 Hrs

Skill Tags:

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

Creating Fields in consumer Objects

Duration: 1 Hrs

Skill Tags:

S.no	Object name	Fields	data type

1.	consumer	<table border="1"> <tr> <td>First name</td><td>Text</td></tr> <tr> <td>Last name</td><td>Text</td></tr> <tr> <td>Phone number</td><td>phone</td></tr> </table>	First name	Text	Last name	Text	Phone number	phone
First name	Text							
Last name	Text							
Phone number	phone							
		<table border="1"> <tr> <td>email</td><td>email</td></tr> <tr> <td>Rice taken by shops</td><td>Number (length=5)</td></tr> </table>	email	email	Rice taken by shops	Number (length=5)		
email	email							
Rice taken by shops	Number (length=5)							
		<table border="1"> <tr> <td>Rice type</td><td>(Picklist values) 1.basmati 2.sella 3.vangi 4.japonica</td></tr> <tr> <td>Mode of payment</td><td> Picklist values <ul style="list-style-type: none"> ● Credit card ● Debit card ● Net banking ● UPI ● Cash </td></tr> </table>	Rice type	(Picklist values) 1.basmati 2.sella 3.vangi 4.japonica	Mode of payment	Picklist values <ul style="list-style-type: none"> ● Credit card ● Debit card ● Net banking ● UPI ● Cash 		
Rice type	(Picklist values) 1.basmati 2.sella 3.vangi 4.japonica							
Mode of payment	Picklist values <ul style="list-style-type: none"> ● Credit card ● Debit card ● Net banking ● UPI ● Cash 							

Creating Cross Object Formula Field in consumer Object

Duration: 2 Hrs

Skill Tags:

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

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

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

Step 2. Choose output type

Step 2 of 5 Previous **Next** Cancel

Field Label	Field Name
Auto add to custom report type <input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity i	
Formula Return Type	
<input checked="" type="radio"/> None Selected Select one of the data types below.	
<input type="radio"/> Checkbox Calculate a boolean value. Example: <code>[TODAY()] > CloseDate</code>	
<input type="radio"/> Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount. Example: <code>[Gross Margin = Amount - Cost_c]</code>	
<input type="radio"/> Date Calculate a date, for example, by adding or subtracting days to other dates. Example: <code>[Reminder Date = CloseDate - 7]</code>	
<input type="radio"/> Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time. Example: <code>[Next = NOW() + 1]</code>	
<input checked="" type="radio"/> Number Calculate a numeric value. Example: <code>[Fahrenheit = 1.8 * Celsius_c + 32]</code>	
<input type="radio"/> Percent Calculate a percent and automatically add the percent sign to the number. Example: <code>[Discount = (Amount - Discounted_Amount_c) / Amount]</code>	

5. Insert fields formula should be :

rice_taken_by_shops_c * rice_mill_name_r.rice_price_kg_c

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

Simple Formula **Advanced Formula**

amount paid (Number) =

```
rice_taken_by_shops_c * rice_mill_name_r.rice_price_kg_c
```

Functions

-- All Function Categories -- ▾

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

Insert Selected Function

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

1. Creating the Formula field in consumer Object

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

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

The screenshot shows the Salesforce Formula Editor interface. At the top, there are tabs for 'Simple Formula' and 'Advanced Formula', with 'Simple Formula' selected. Below the tabs are buttons for 'Insert Field', 'Insert Operator', and a dropdown menu for 'Functions'. The main area contains the formula code: 'amount paid (Number) = rice_taken_by_shops_c * rice_mill_name_r.rice_price_kg_c'. A status bar at the bottom indicates 'Check Syntax' and 'No syntax errors in merge fields or functions. (Compiled size: 67 characters)'.

8.

Creating the validation rule

Duration: 1 Hrs

Skill Tags:

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.

The screenshot shows the 'Validation Rules' section for the 'consumer' object. It lists one rule named 'phonenumeroremailblankrule' with an error message 'please fill phone number'. The 'ACTIVE' column shows a checkmark, and the 'MODIFIED BY' column shows 'udayrushi.yelagandula, 05/07/2023, 12:57 pm'. A 'New' button is located in the top right corner of the table header.

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.

The screenshot shows the 'Validation Rule Edit' dialog. The 'Rule Name' is 'phonenumeroremailblankrule', 'Active' is checked, and the 'Description' is 'phone number and email should not be blank'. The 'Error Condition Formula' field contains 'OR(ISBLANK(phone_number_c), ISBLANK(email_c))'. A tooltip for the 'OR' function is displayed, stating it returns true if either argument is true. The 'Check Syntax' button at the bottom left shows 'No errors found'.

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

The screenshot shows the Salesforce Validation Rule Formula Editor. At the top, there are buttons for "Insert Field" and "Insert Operator". Below that is a formula field containing the code: `OR(ISBLANK(phone_number__c), ISBLANK(email__c))`. To the right of the formula is a dropdown menu with several options: ACOS, ADDMONTHS, AND, ASCII, ASIN, Insert Selected Function, ABS(number), and Help on this function. Below the formula field is a "Check Syntax" button. Under the formula field, there is a section titled "Error Message" with the following details:

- Example:** Discount percent cannot exceed 30%
- This message will appear when Error Condition formula is **true**
- Error Message:** please fill phone number
- This error message can either appear at the top of the page or below a specific field on the page
- Error Location:** Top of Page Field [i](#)

At the bottom of the editor are three buttons: Save, Save & New, and Cancel.

9.

10. Save the validation rule.

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.

creating the page layout

Duration: 1 Hrs

Skill Tags:

To Create a Page layout:

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

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

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

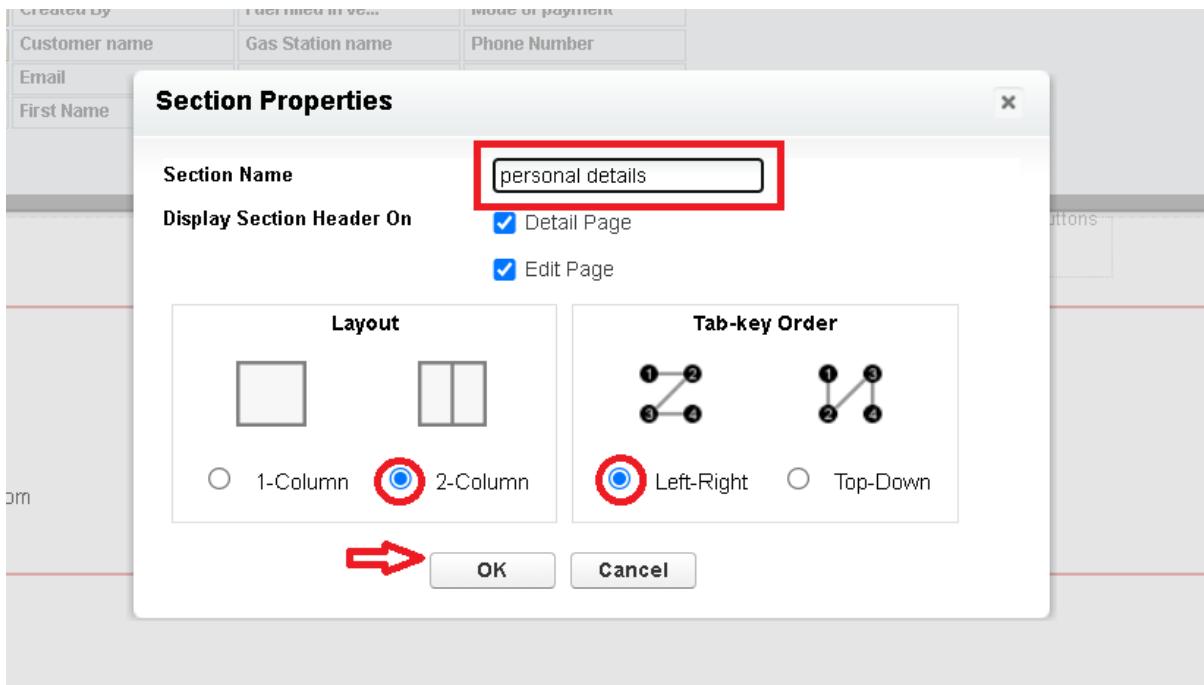
Create New Page Layout

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

Existing Page Layout	custom.page
Page Layout Name	<input type="text" value="customer layout"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

4.

5. Drag and drop the section field to consumer details and create the section.
 6. Enter the section name as "Personal details", - click Ok.



7. Now drag the fields to this section that mentioned , they are
- First name , last name , consumer name , phone number, email, rice mill name.

8. Follow the same process for another two sections as shown above , they are

9. One section is “ rice details ” , drag the fields that are

- Rice taken by shop, rice type.

10. Another section is “Receipt details ”, and drag the fields that are

- Mode of payment , Amount paid.

11. Then

Click

save.

12.

Field	customer Name	last name	rice taken by shops
customer Name	GEN-2004-001234		
phone number	1-415-555-1212		
email	sarah.sample@company.com		
rice mill name	Sample Text		

Field	first name	last name	rice type
first name	Sample Text		
last name	Sample Text		
customer Name			
phone number			
email			
rice mill name	Sample Text		

Field	mode of payments	amount paid
mode of payments	Sample Text	
amount paid		313.59

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 delete standard ones

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

2. Custom Profiles:

Custom ones defined by us.

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

owner Profile

Duration: 1 Hrs

Skill Tags:

To create a new profile:

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

Profile Detail

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

Page Layouts

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

2.

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

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

4.

- Session Settings

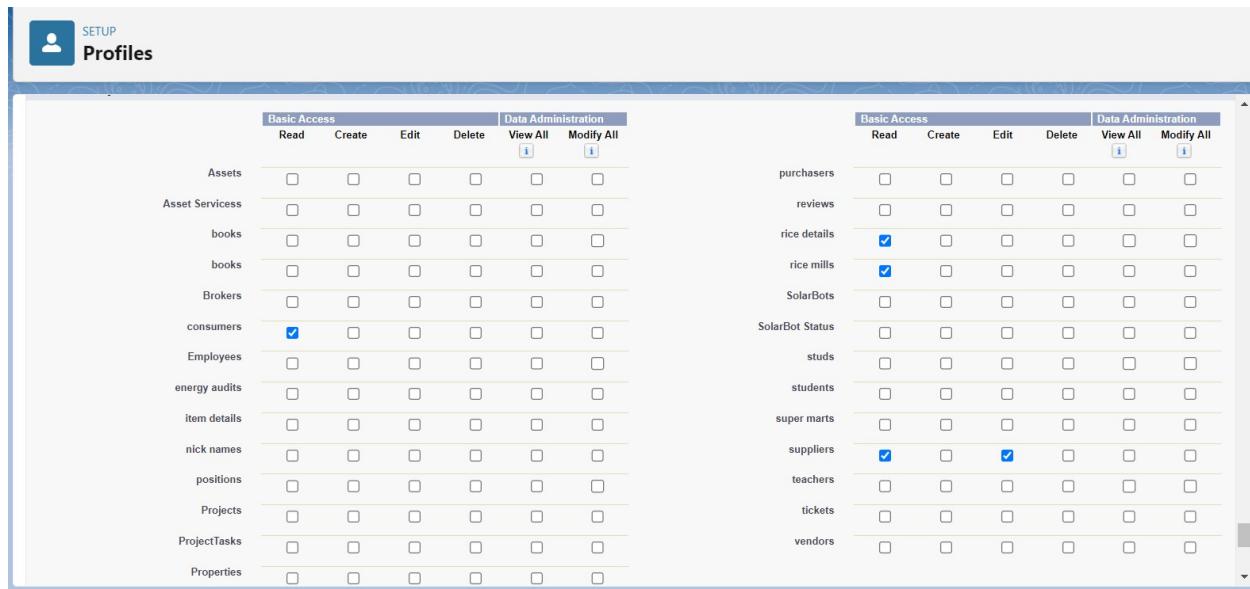
- Give access and save it.

employer Profile

Duration: 1 Hrs

Skill Tags:

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



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

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

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

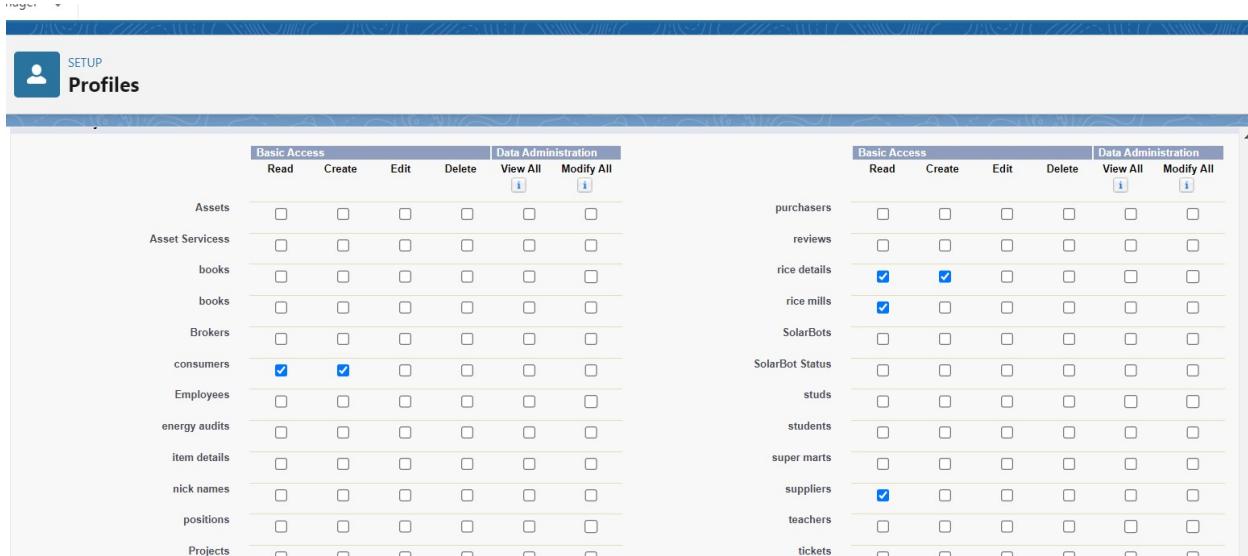
5. And click save.

worker Profile

Duration: 1 Hrs

Skill Tags:

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.

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.

Creating owner Role

Duration: 1 Hrs

Skill Tags:

Creating owner Role:

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

Setup Home Object Manager

roles

Users Roles

Feature Settings

- Sales
 - Contact Roles on Contracts
 - Contact Roles on Opportunities
- Service
- Case Teams
 - Case Team Roles
 - Contact Roles on Cases

Didn't find what you're looking for? Try using Global Search.

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy

View other sample Role Hierarchies: [Territory-based Sample](#)

* View & edit data, roll up forecasts, & generate reports
• Can access data of other Executive Staff

* View & edit data, roll up forecasts, & generate reports for users at same level below
• Can't access data of users above or at same level

* View & edit data, roll up forecasts, & generate reports for users at same level below
• Can't access data of users above or at same level

Set Up Roles

Don't show this page again

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

Your Organization's Role Hierarchy

Collapse All **Expand All**

- Nick Enterprises**
 - Add Role**
 - CEO** Edit | Del | Assign
 - HR** Edit | Del | Assign
 - Manager** Edit | Del | Assign
 - On Site Emp** Edit | Del | Assign
 - Remote Emp** Edit | Del | Assign

... Customer Support & Sales

4. Give Label as "owner" and Role name gets auto populated. Then click on Save.

SETUP Roles

Help for this Page

Role Edit New Role

Role Edit

Label	owner
Role Name	owner
This role reports to	CEO
Role Name as displayed on reports	

Save Save & New Cancel

1. Click and save it.

Creating employer roles

Duration: 1 Hrs

Skill Tags:

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.

The screenshot displays the 'Your Organization's Role Hierarchy' interface. At the top, there's a header with a user icon, 'SETUP', and 'Roles'. Below the header, the title 'Creating the Role Hierarchy' is centered. A sub-header 'Your Organization's Role Hierarchy' follows, with 'Collapse All' and 'Expand All' buttons. To the right, there are 'Help for this Page' and 'Show in tree view' buttons. The main content area shows a hierarchical tree of roles under 'smartbridge'. The 'owner' role is currently selected, highlighted with a red box around its edit, delete, and assign buttons. Other roles listed include CEO, CFO, COO, HR, and several SVP-level roles. Each role node has an 'Add Role' link underneath it. The entire interface has a clean, modern design with a blue header and white background.

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

7. 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.

Create User

Duration: 1 Hrs

Skill Tags:

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

10. User license: Salesforce

11. Profiles:

owner.

The screenshot shows the 'User Edit' page for a user named 'vicky y'. The 'General Information' section contains fields for First Name (vicky), Last Name (y), Alias (vy), Email (ramesh0820@gmail.com), Username (ramesh0820@754123gmail), Nickname (vicky), Title, Company, Department, and Division. The 'Roles' section includes a dropdown for 'Role' (owner) and 'User License' (Salesforce). The 'Profiles' section shows 'Profile' (owner) selected. Under 'Active', there is a checked checkbox. A list of other user types like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Data.com User Type (set to 'None') are also listed. A note at the bottom indicates a monthly addition limit of 300.

12. Save it.

creating another users

Duration: 1 Hrs

Skill Tags:

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

Create Another User

Duration: 1 Hrs

Skill Tags:

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

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.

Creating OWD setting.

Duration: 1 Hrs

Skill Tags:

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

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Public Read/Write	Private	<input checked="" type="checkbox"/>

2. Scroll down, change the default internal access to " public read-only" for rice mill

andsupplier 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.

Create Report

Duration: 1 Hrs

Skill Tags:

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

Try to fill every field in each record for better experience.

1. Go to the app >>click on the reports tab

2. Click

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	range of amount per day	estimated rice per day	udayrushi.yelagandula	10/7/2023, 2:41 pm		
Recent	range of amount per day	estimated rice per day	udayrushi.yelagandula	13/7/2023, 12:56 pm		
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	25/4/2023, 10:49 am		

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

Create Report

Category	Select a Report Type	
Recently Used		
All	Report Type Name	Category
Accounts & Contacts	rice mills with consumers	Standard
Opportunities		
Customer Support Reports		
Leads		
Campaigns		
Activities		
Contracts and Orders		
Price Books, Products and Assets		

1. Their outline pane is opened already, select the fields that are mentioned below in the column section.

- 1.consumer name
- 2.rice type
- 3.rice price/kg
- 4.mode of payments
- 5.amount paid

2. Remove the unnecessary fields.

3. Select the fields that are mentioned below in the GROUP ROWS section.

1. Rice taken by shops

REPORT ▾

New rice mills with consumers Report rice mills with consumers

My Rice suppliers rice mills rice details consumers Reports

Fields Outline Filters 1 Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

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

Row Counts: Detail Rows: Subtotals: Grand Total:

Add Chart Save & Run Save Close

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

Report: rice mills with consumers
range of amount per day

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

<input type="checkbox"/> rice taken by shops ↑	consumer: consumer name ↓	rice type ↓	rice price/kg ↓	mode of payments ↓	amount paid ↓
<input type="checkbox"/>	A-0001	basmati	50	Net banking	250.00
	A-0005	normal rice	50	Cash	250.00
Subtotal			50		500.00
<input type="checkbox"/>	A-0002	normal rice	50	Cash	300.00
	A-0004	basmati	50	Cash	300.00
Subtotal			50		600.00
<input type="checkbox"/>	A-0003	normal rice	50	Cash	400.00
Subtotal			50		400.00
<input type="checkbox"/>	A-0006	basmati	50	Cash	500.00
Subtotal			50		500.00
<input type="checkbox"/>	A-0007	basmati	50	Cash	600.00
Subtotal			50		600.00
<input type="checkbox"/>	A-0008	basmati	50	Cash	750.00
Total			--		--

Row Counts Detail Rows Subtotals Grand Total

Sharing report to owner

Duration: 1 Hrs

Skill Tags:

1. Click edit drop down and select subscribe option

My Rice suppliers ↓ rice mills ↓ rice details ↓ consumers ↓ * range of amount per day ↓ X

Report: rice mills with consumers
range of amount per day

Enable Field Editing | Add Chart | Edit | **Subscribe**

<input type="checkbox"/> rice taken by shops ↑	consumer: consumer name ↓	rice type ↓	rice price/kg ↓	mode of payments ↓	amount paid ↓
<input type="checkbox"/>	A-0003	normal rice	50	Cash	400.00
Subtotal			50		400.00
<input type="checkbox"/>	A-0006	basmati	50	Cash	500.00
Subtotal			50		500.00
<input type="checkbox"/>	A-0007	basmati	50	Cash	600.00
Subtotal			50		600.00
<input type="checkbox"/>	A-0008	basmati	50	Cash	750.00
Subtotal			50		750.00
<input type="checkbox"/>	A-0010	normal rice	50	Cash	800.00
Subtotal			50		800.00
<input type="checkbox"/>	A-0009	normal rice	50	Cash	900.00
Subtotal			50		900.00
<input type="checkbox"/>	A-0011	basmati	50	Net banking	4,000.00
Subtotal			50		4,000.00
Total	(11)				9,050.00

2. Follow as per below image.

Edit Subscription

Settings

Frequency

Time

8:00 am ▾

Attachment

Recipients

Send email to

Me

Run Report As

Me
 Another Person

Cancel

3.

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

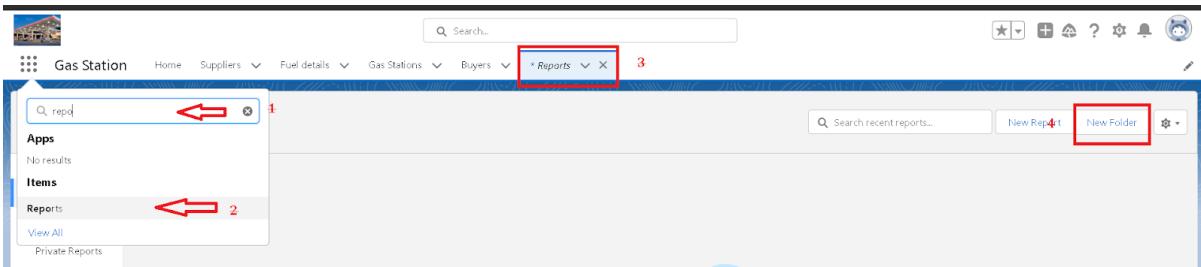
NOTE: The owner gets daily email notification of that rice mill report.so that he can see all data remotely.

create a report folder

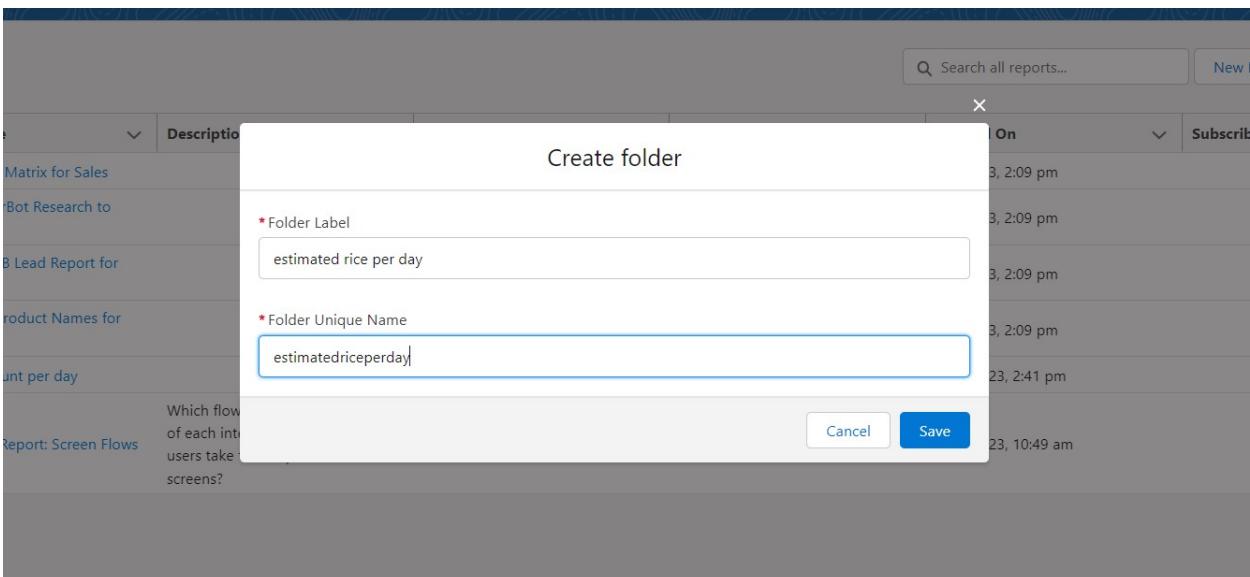
Duration: 1 Hrs

Skill Tags:

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.

Reports

II Reports

tems

REPORTS

Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Erin's SB Opp Matrix for Sales	Acquisition Reports	udayrushi yelagandula	5/6/2023, 2:09 pm	
Created by Me	Lincoln's SolarBot Research to remove	Acquisition Reports	udayrushi yelagandula	5/6/2023, 2:09 pm	
Private Reports	Marketing's SB Lead Report for Sales	Acquisition Reports	udayrushi yelagandula	5/6/2023, 2:09 pm	
Public Reports	Potential SB Product Names for R&D	Acquisition Reports	udayrushi yelagandula	5/6/2023, 2:09 pm	
All Reports	range of amount per day	Private Reports	udayrushi yelagandula	10/7/2023, 2:41 pm	

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

Run

Edit

Subscribe

Export

Delete

Add to Dashboard

Favorite

Move

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

range of amount per day

Move range of amount per day

All Folders

Report Name Description

Erin's SB Opp Matrix for Sales

Lincoln's SolarBot Research to remove

Marketing's SB Lead Report for Sales

Potential SB Product Names for R&D

range of amount per day

Sample Flow Report: Screen Flows

Which flows run, what's the status of each interview, and how long do users take to complete the screens?

New Folder

Cancel

Select

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.

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

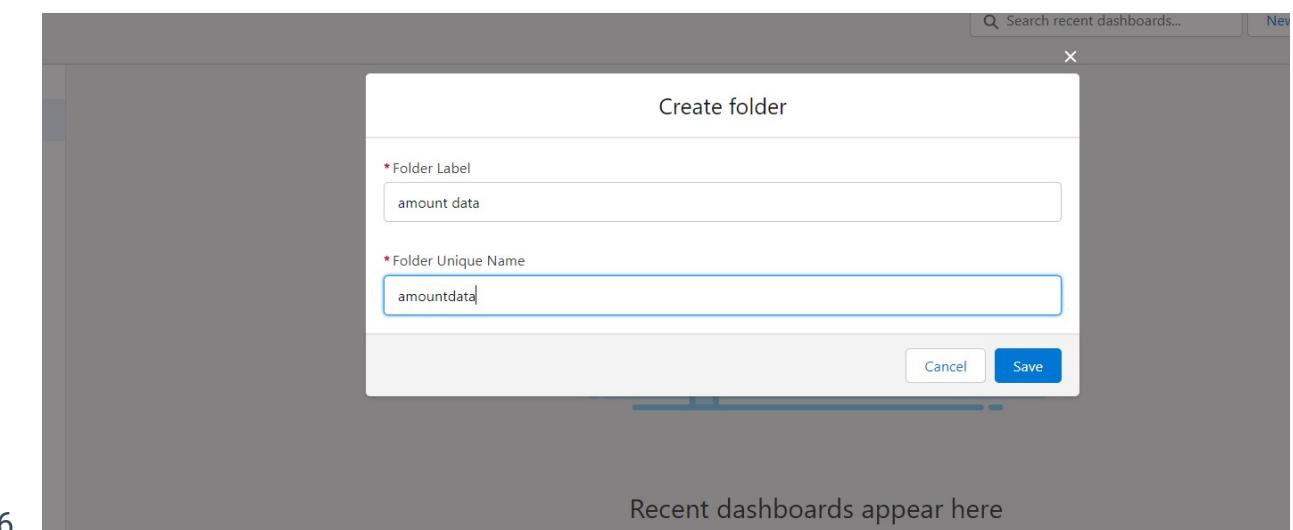
sharing dashboards, review these dashboard basics.

Create Dashboard Folder

Duration: 1 Hrs

Skill Tags:

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.**

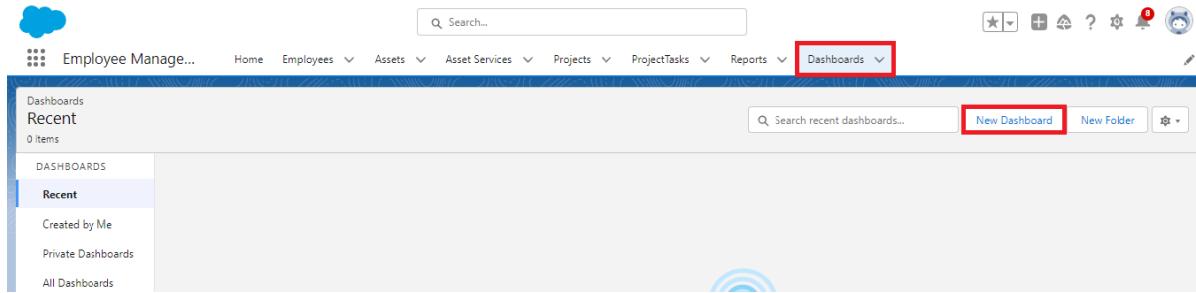


Create Dashboard

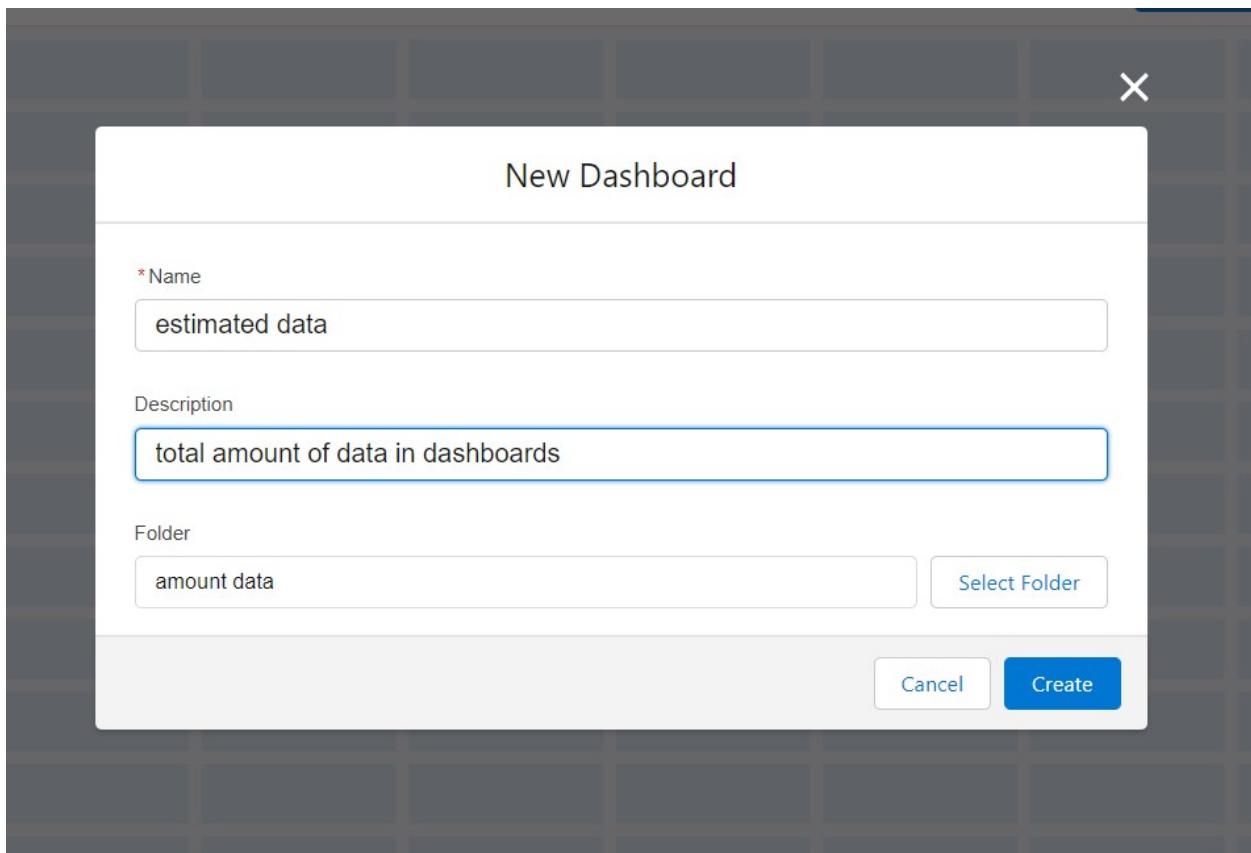
Duration: 1 Hrs

Skill Tags:

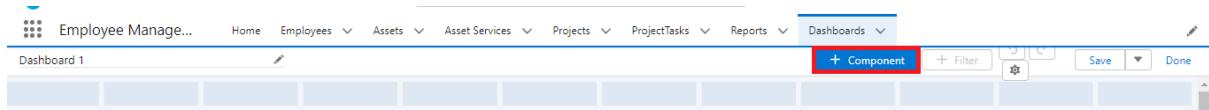
1. Go to the app >> click on the Dashboards tabs.



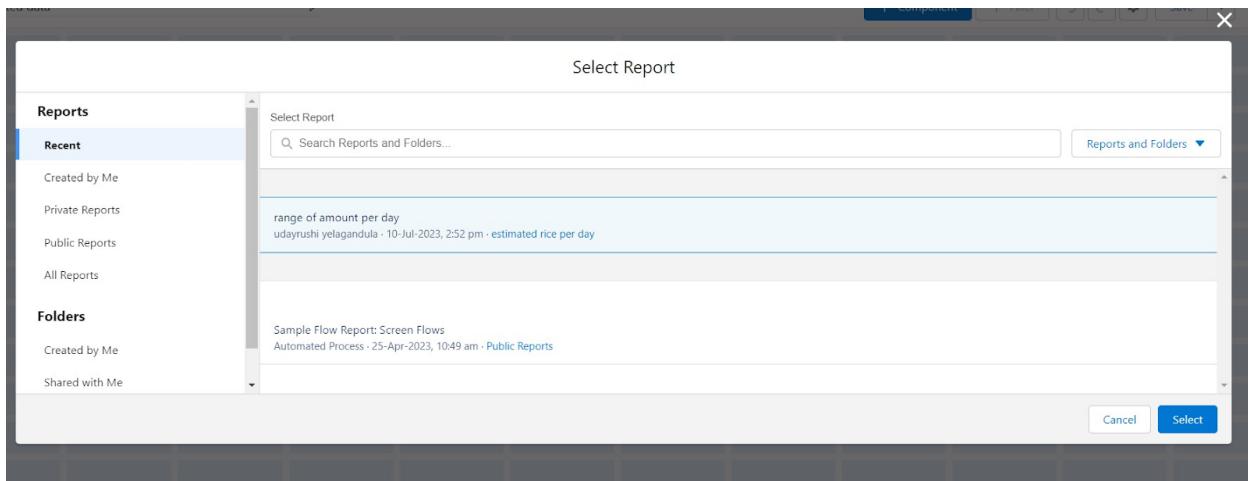
2. Give a Name and select the folder that was created, and click on create.



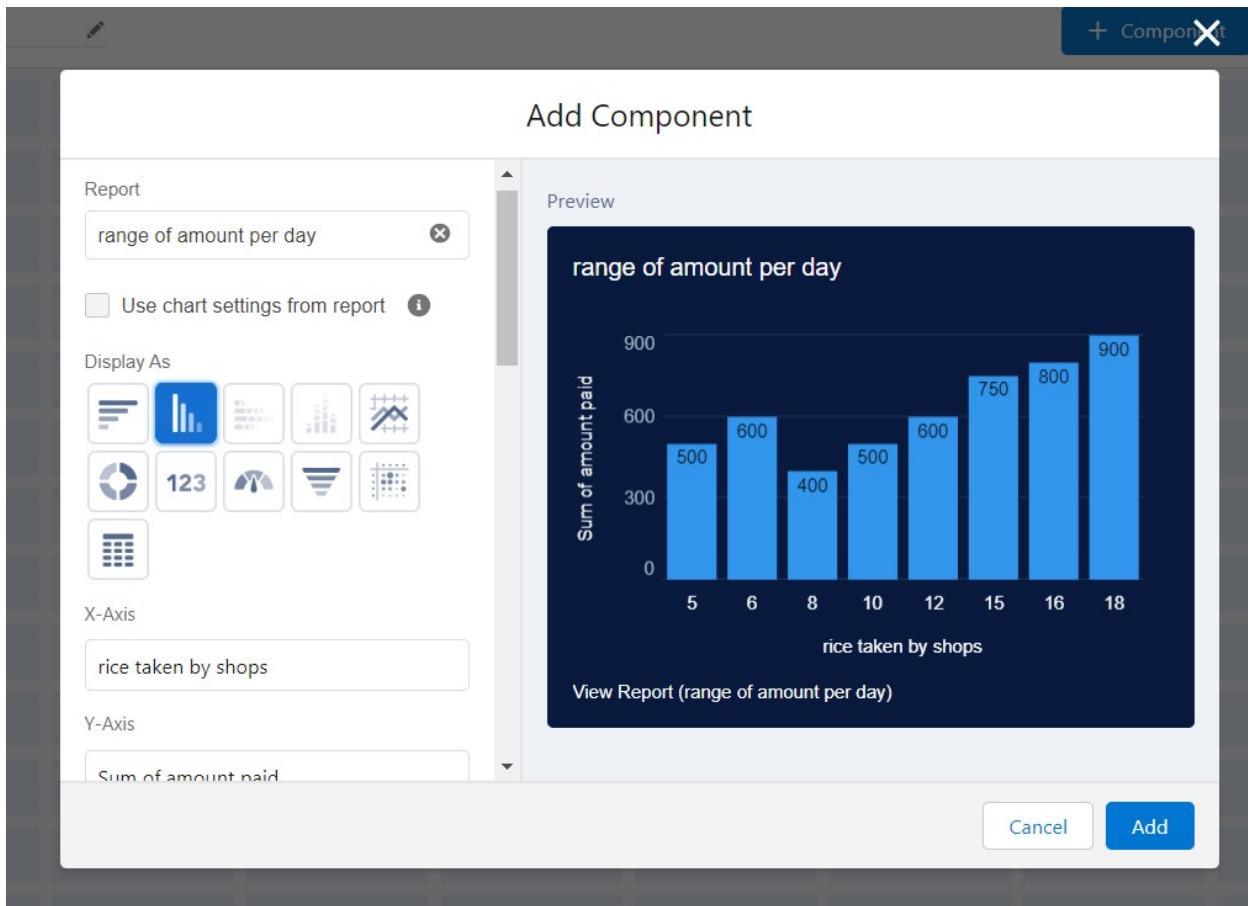
1. Select add component.



1. Select a Report and click on select.



1. Preview is shown below.



Display as>> vertical bar chart

X-axis >> rice taken by shops

Y-axis >> sum of amount

Y-axis range >> automatic

Sort by >> rice taken by shops

Component theme >> dark.

Add the component

Again select add component with above same steps

1.display as donut chart

2.sort by >> sum of amount

3.title>>range of amount per day

4.component theme dark

Value

Sum of amount paid

Sliced By

rice taken by shops

Display Units

Shortened Number

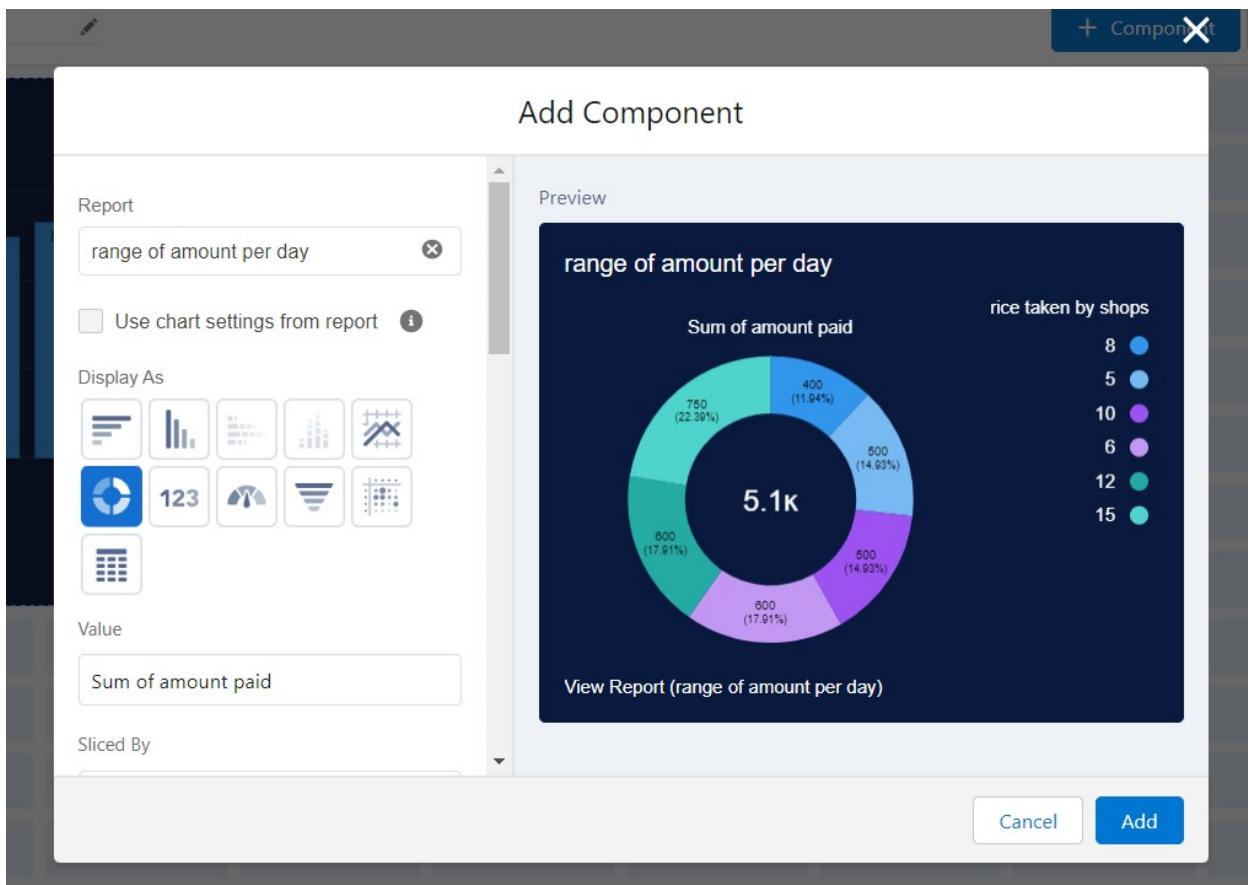
Show Values
 Show Percentages
 Combine Small Groups into "Others"
 Show Total

Decimal Places

Automatic

Click add.

Click save and done.



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**

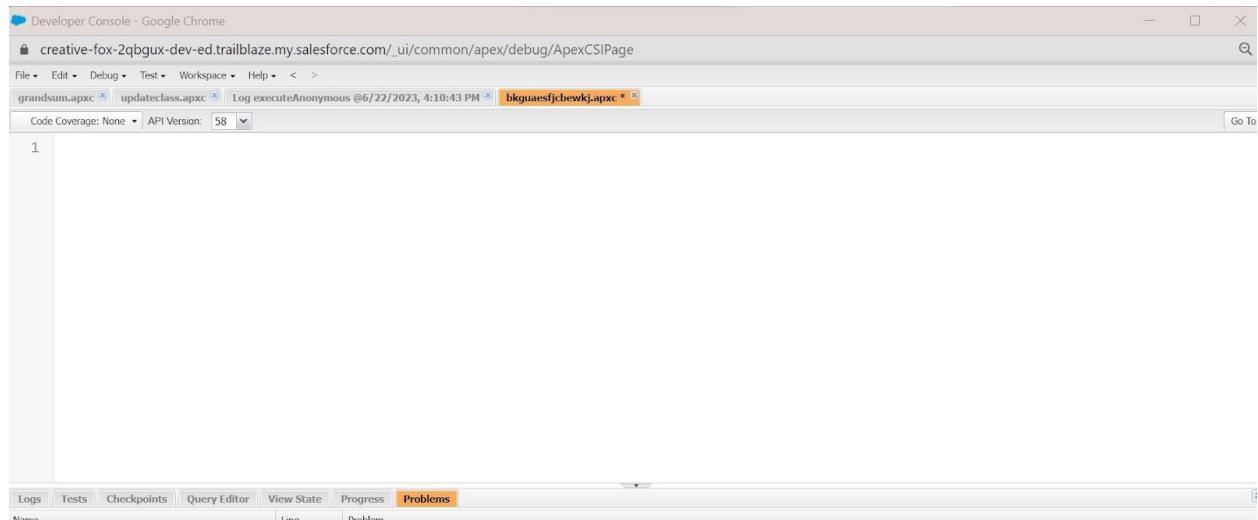
Object is an instance of a class, where it can access all the properties that are present in a class i.e, variables and methods.

Creating an Apex Class(ConsumerRecord)

Duration: 1 Hrs

Skill Tags:

1. Login to the Salesforce account and navigate to the gear account in the top right corner.
2. Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.



3. Then you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Class.
4. Enter the name of the class(ConsumerRecord) to create a new class file.

Code

Snippet

:

```

class ConsumerRecord {

    public static void sendEmailNotification (List<consumer_c> con){
        for(consumer_c c:con)
        {
            Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
            email.setToAddresses( new List<String>{c.email_c});
            email.setSubject('Welcome to our company');
            email.setPlainTextBody('Dear ' + ' '+ '\n\nWelcome to MY RICE!'+'You have been seen as a
valuable customer to us. Please continue your journey with us, while we try to provide you with
good quality resources.'+'\n'+
                    "We are proud to associate with valuable customers like you and we look
forward to collaborating with you by providing more and more exciting discounts or even product
offers too.' + '\n'
                    +'So why taking a step back, take a leap of faith and shop with us more,
while we provide with the valuable products and offers'+'\n'+ '\n'+ '\n'+
                    'Thankyou for buying '+' '+ 'Here are some of the products that are
brought by the customers who similarly bought products like this'+'\n\n');

            Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});

        }
    }
}

```

The screenshot shows the Salesforce Developer Console in Google Chrome. The URL is smartbridge26-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The tab bar has three tabs: ConsumerRecord.apxc (selected), consumerTrigger.apxt, and RiceDetails.apxc. The main area displays the following Apex code:

```

1  class ConsumerRecord {
2    public static void sendEmailNotification (List<consumer__c> con){
3      for(consumer__c c:con)
4      {
5        Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
6        email.setToAddresses( new List<String>{c.email__c});
7        email.setSubject('Welcome to our company');
8        email.setPlainTextBody('Dear ' + ' + ',\nWelcome to MY RICE!'+You have been seen as a valuable customer to us. Please continue your
9          'We are proud to associate with valuable customers like you and we look forward to collaborate with you by pr
10          +'So why taking a step back, take a leap of faith and shop with us more, while we provide with the valuable p
11          'Thankyou for buying ' + '' +'Here are some of the products that are brought by the customers who similarly bo
12        Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
13      }
14
15
16
17
18
19

```

The status bar at the bottom shows 'Logs Tests Checkpoints Query Editor View State Progress Problems' with 'Problems' selected. The API Version is set to 58.

Creating an Apex Trigger

Duration: 1 Hrs

Skill Tags:

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
}

```

Trigger code:

```
trigger consumerTrigger on consumer__c (After insert) {
```

```
  if(trigger.isAfter && trigger.isInsert) {
```

```
        ConsumerRecord.sendEmailNotification(trigger.new);
    }
}
```

The screenshot shows the Salesforce Developer Console interface. The title bar reads "Developer Console - Google Chrome" and the URL is "smartbridge26-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage". The tabs at the top include "ConsumerRecord.apxc", "consumerTrigger.apxt" (which is the active tab), "RiceDetails.apxc *", and "RiceDetail.apxt *". Below the tabs, there are dropdowns for "Code Coverage: None" and "API Version: 58". The main content area displays the Apex trigger code:

```
1 trigger consumerTrigger on consumer__c (After insert) {
2     if(trigger.isAfter && trigger.isInsert)
3     {
4         ConsumerRecord.sendEmailNotification(trigger.new);
5     }
6
7 }
```

At the bottom of the console, there is a navigation bar with tabs: Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The "Problems" tab is currently selected. Below the navigation bar, there is a search bar labeled "Name" and three columns: "Line", "Problem", and "Problem".