

A CRM APPLICATION FOR WHOLESALE RICE MILL

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Short Description:

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

Long Description:

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

Milestones and Activities:

Milestone 1-Salesforce :

Introduction:

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

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

What Is Salesforce?

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

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

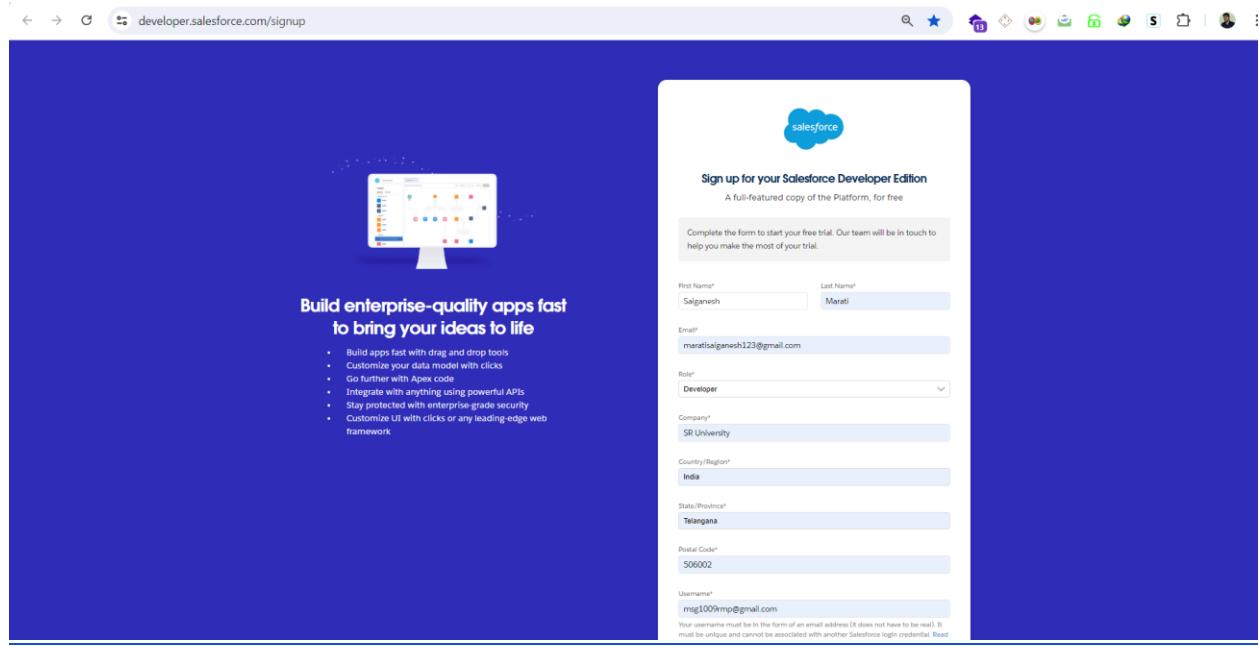
So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3lGde5k>

Activity 1: Creating Developer Account:

Creating a developer org in salesforce.

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



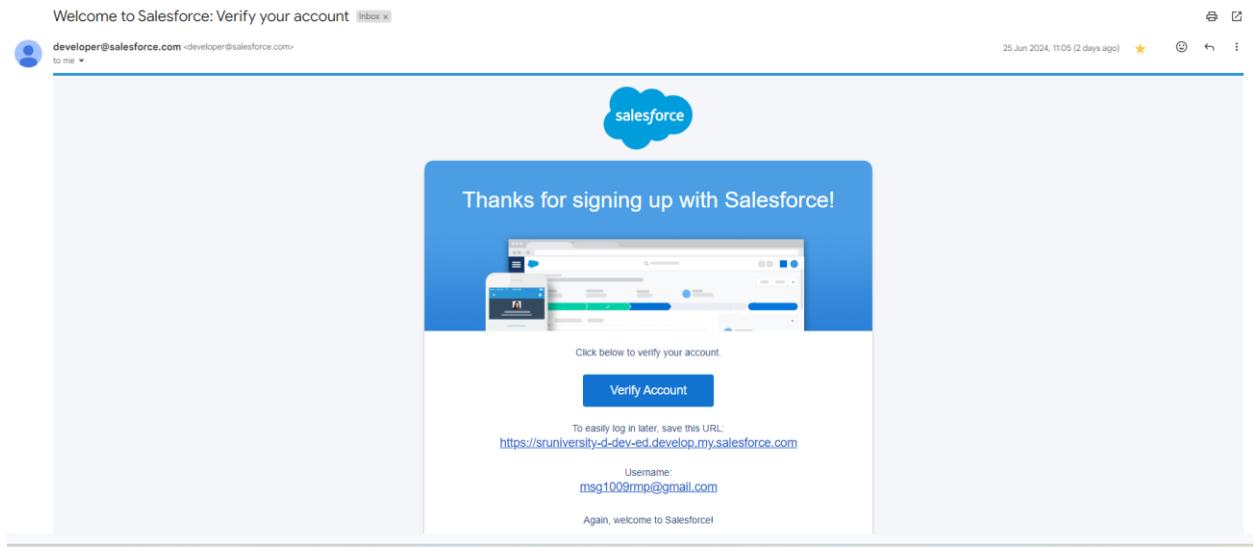
- 1) First name: Saiganesh
- 2) Last name: Marati
- 3) Email: msg1009rmp@gmail.com
- 4) Role : Developer
- 5) Company : SR University
- 6) County : India
- 7) Postal Code : 506002
- 8) Username : should be a combination of your name and company

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

Click on sign me up after filling these.

Activity 2: Account Activation:

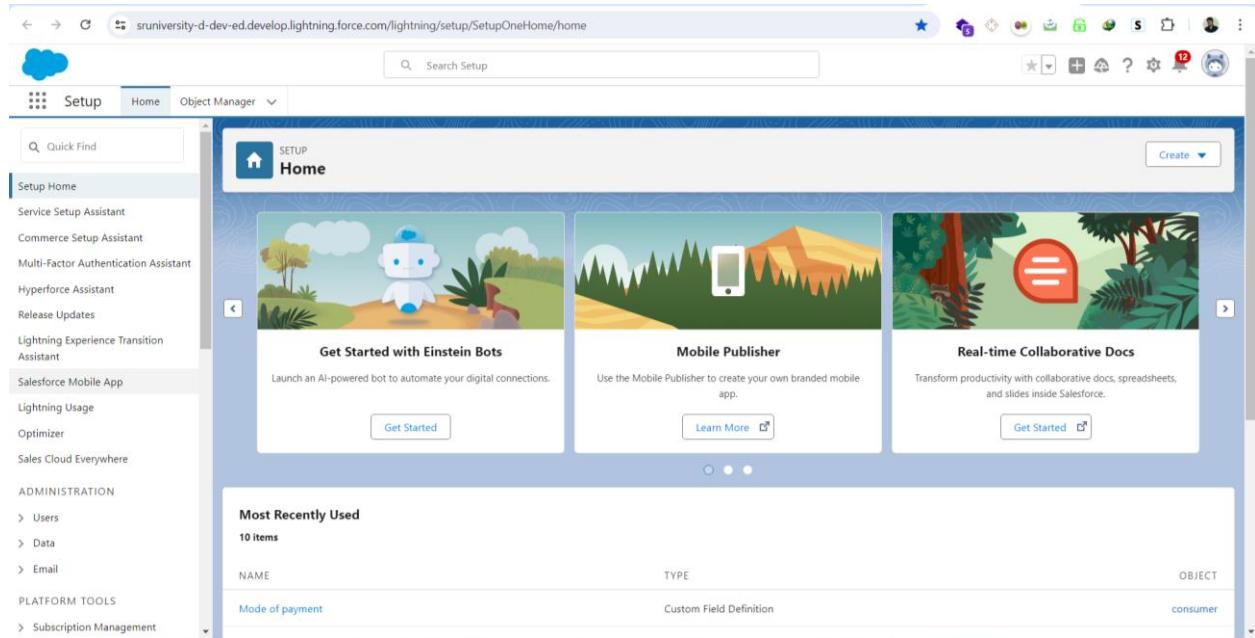
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



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

A screenshot of the "Change Your Password" page. The title is "Change Your Password". It asks for a new password for lead@sb.com, with requirements: 8 characters, 1 letter, and 1 number. A red box highlights the "New Password" field, which contains "Good". Another red box highlights the "Confirm New Password" field, which contains "Match". Below these are "Security Question" and "Answer" fields. The "Answer" field contains "asdfghjkl". A large red box highlights the "Change Password" button at the bottom.

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



Milestone 2- Object

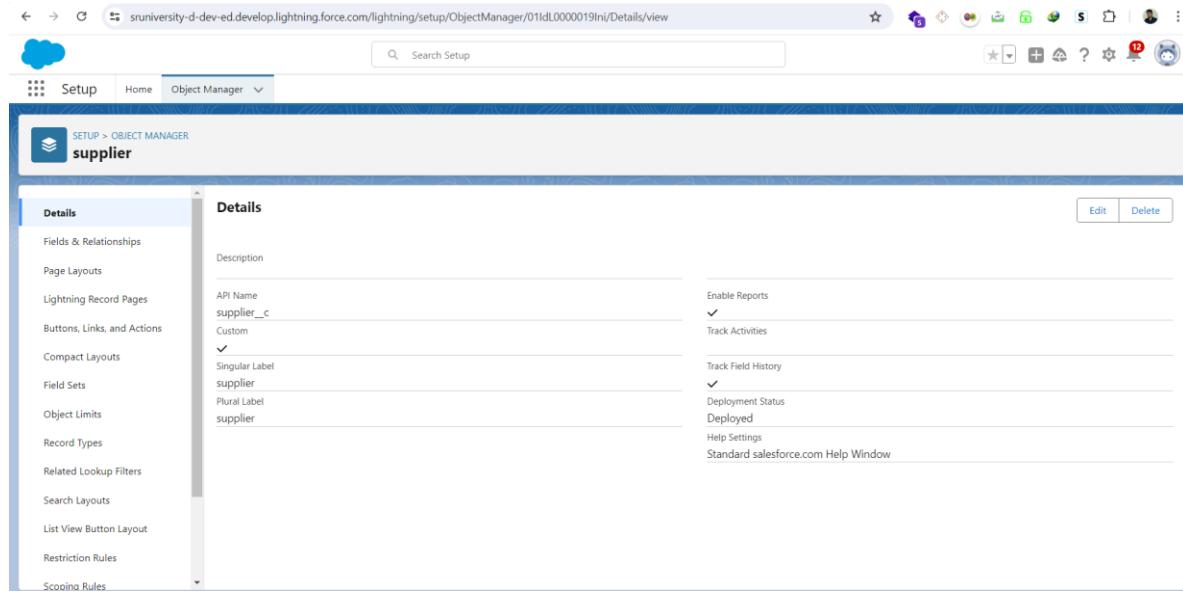
What Is an Object?

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

Activity 1: Create Supplier Object:

To create an object:

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



Activity 2: Create Rice mill Object:

To create an object:

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

The screenshot shows the Salesforce Setup Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "rice mill". On the left, a sidebar lists various configuration tabs: 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, and Scoping Rules. The main content area displays the "Details" tab for the "rice mill" object. It contains fields for Description, API Name (rice_mill__c), Singular Label (rice mill), Plural Label (rice mills), and several checkboxes for system settings like Enable Reports, Track Activities, and Track Field History. At the bottom right of the main area are "Edit" and "Delete" buttons.

Activity 3: Create consumer Objects:

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

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

The screenshot shows the Salesforce Setup interface with the URL sruniversity-d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Id0000019ZcH/Details/view. The page title is "SETUP > OBJECT MANAGER consumer". The left sidebar lists various object configuration options like Fields & Relationships, Page Layouts, and Record Types. The main "Details" section shows the API Name as "consumer__c", Singular Label as "consumer", and Plural Label as "consumers". Buttons for "Edit" and "Delete" are at the top right.

Activity 4: Create rice details Objects:

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

The screenshot shows the Salesforce Setup interface with the URL sruniversity-d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Id0000019TK0/Details/view. The page title is "SETUP > OBJECT MANAGER rice details". The left sidebar lists various object configuration options. The main "Details" section shows the API Name as "rice_details__c", Singular Label as "rice details", and Plural Label as "rice details". Buttons for "Edit" and "Delete" are at the top right.

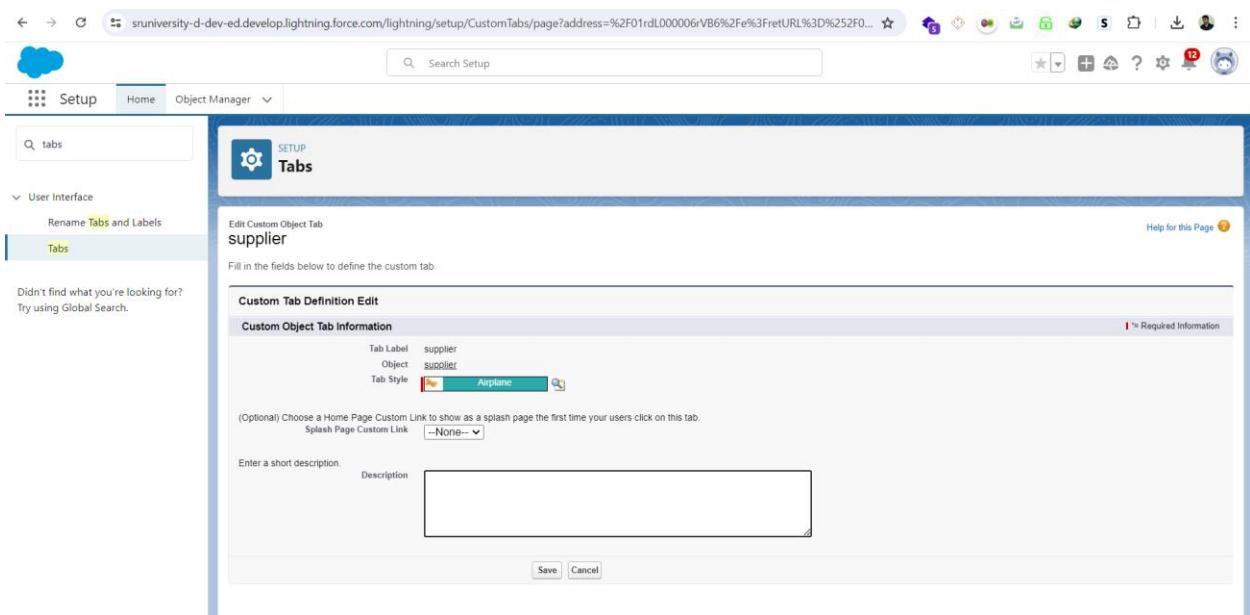
Milestone 3- Tabs

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

Activity 1: Creating a Custom Tab

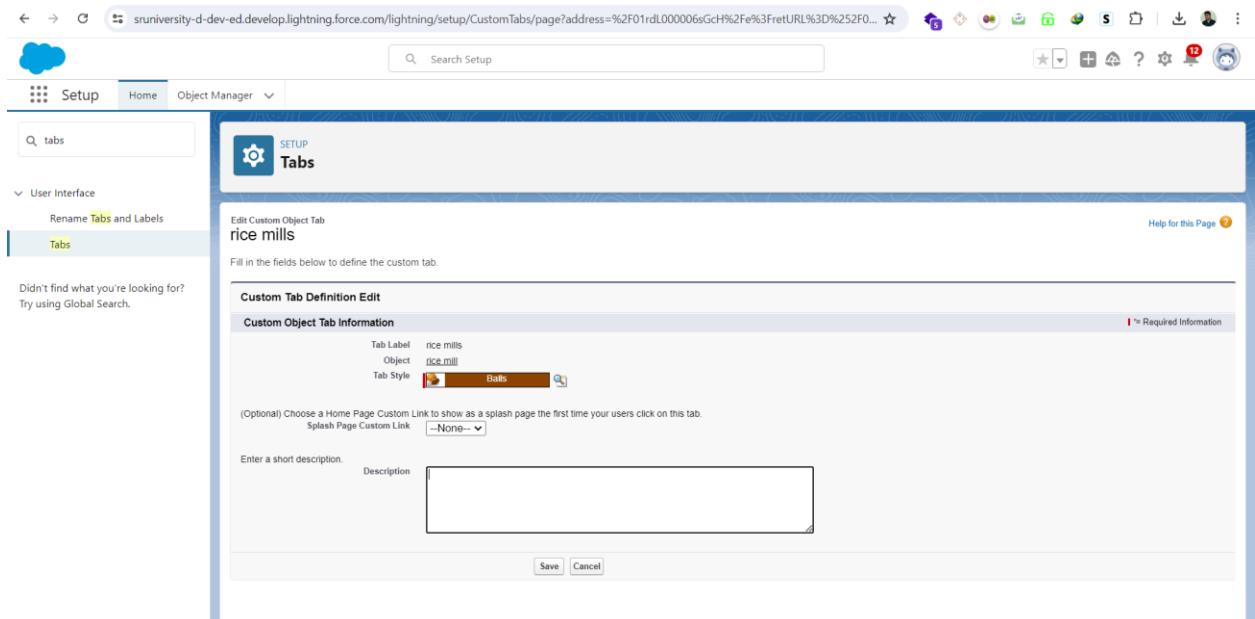
To create a Tab:(supplier)

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. Follow the same steps as mentioned in Activity -1 .
3. After completion of creating tabs in tabs section you can see custom object tabs.



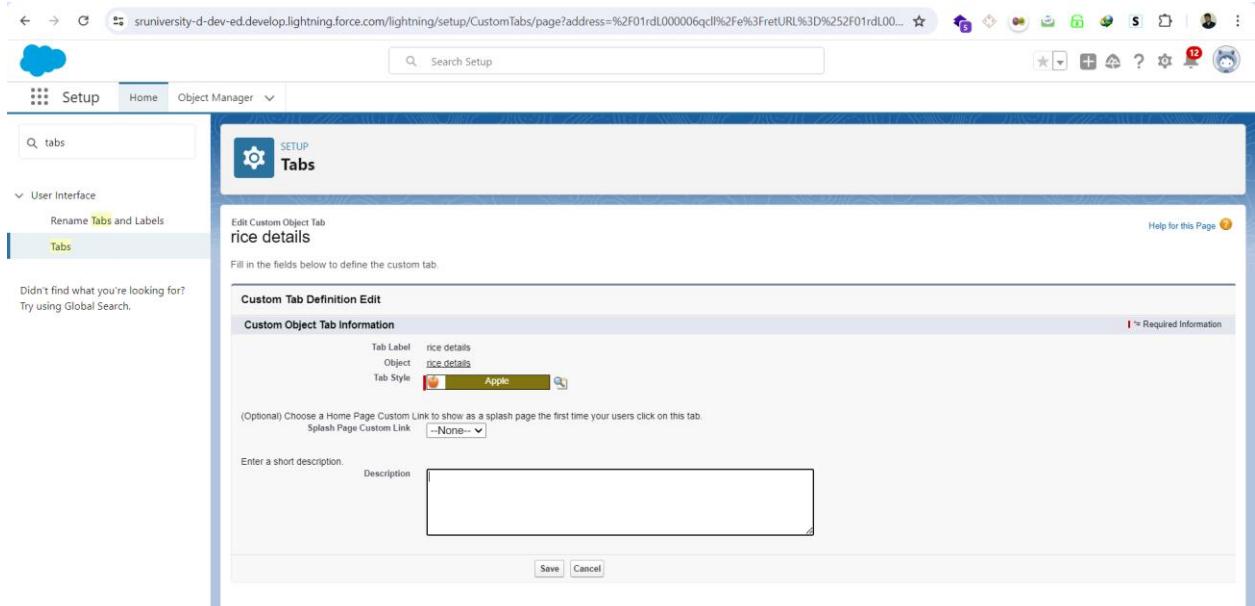
The screenshot shows the Salesforce Setup interface with the URL <https://sruniversity-d-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01rdL000006sGcH%2Fe%3FretURL%3D%252F0...>. The page title is "Edit Custom Object Tab rice mills". The "Custom Object Tab Information" section includes:

Tab Label	rice mills
Object	rice mill
Tab Style	Balls

(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: None

Enter a short description.

Save Cancel



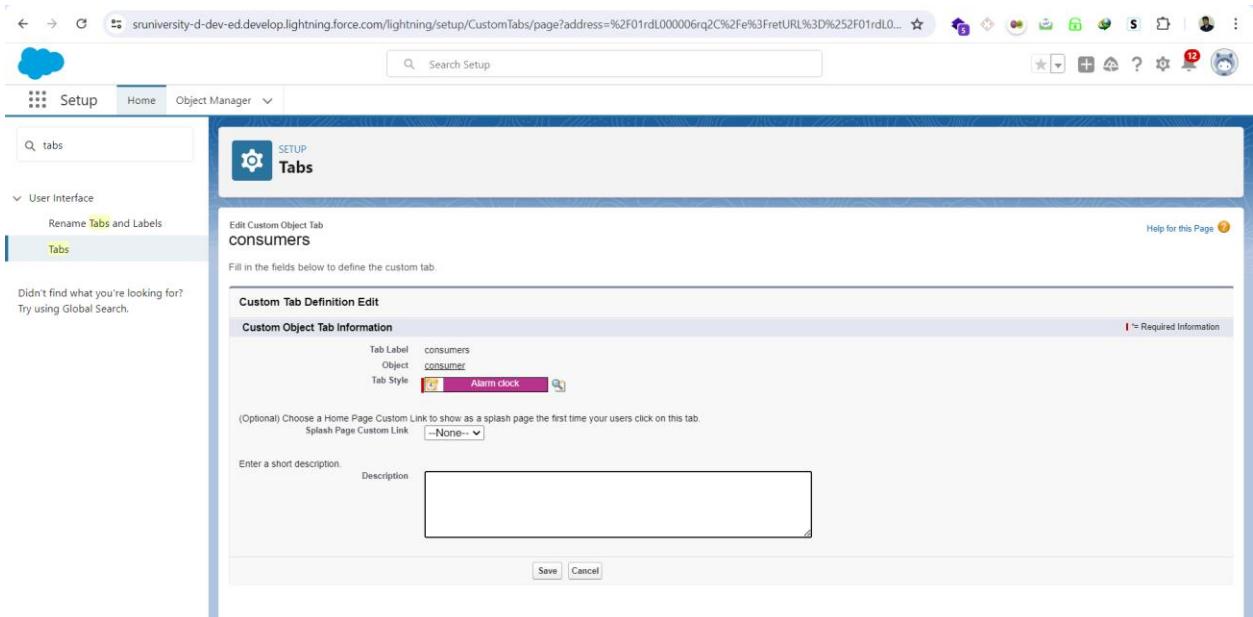
The screenshot shows the Salesforce Setup interface with the URL <https://sruniversity-d-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01rdL000006qcl%2Fe%3FretURL%3D%252F01rdL00...>. The page title is "Edit Custom Object Tab rice details". The "Custom Object Tab Information" section includes:

Tab Label	rice details
Object	rice details
Tab Style	Apple

(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: None

Enter a short description.

Save Cancel



Milestone 4- The Lightning App:

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

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

Activity 1: Create a Lightning App

To create a lightning app page:

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

Lightning Experience App Manager

New Lightning App New Connected App

Enable App Cloning

App Name	Developer Name	Description	Last Modified	Type	Visible
1 All Tabs	AllTabSet		04/12/2022, 10:10 am	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:10 am	Classic	
3 App Launcher	AppLauncher	App Launcher Test	04/12/2022, 10:10 am	Classic	
4 B2B Solutions	LightningB2B	Discover and manage business solutions designed for your industry.	04/12/2022, 10:10 am	Lightning	
5 Chatter Desktop	ChatterDesktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected to their social network.	28/12/2022, 4:04 pm	Connected (Managed)	
6 Chatter Mobile for BlackBerry	ChatterForBlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view news, comments, and posts from your social network.	28/12/2022, 4:05 pm	Connected (Managed)	
7 College Management System	hakim	demo app	08/12/2022, 4:19 pm	Lightning	
8 Community	Community	Salesforce CRM Communities	04/12/2022, 10:10 am	Classic	
9 Content	Content	Salesforce CRM Content	04/12/2022, 10:10 am	Classic	
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	04/12/2022, 10:10 am	Lightning	

- 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.

App Details & Branding

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

App Details

* App Name i

* Developer Name i

Description i

App Branding

Image i

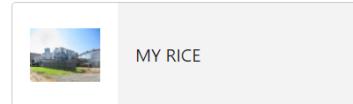


Primary Color Hex Value i
 #0070D2

Org Theme Options

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

App Launcher Preview



App Options

Navigation and Form Factor i

* Navigation Style

- Standard navigation
- Console navigation

* Supported Form Factors

- Desktop and phone
- Desktop
- Phone

Setup and Personalization i

Setup Experience

- Setup (full set of Setup options)
- Service Setup

App Personalization Settings

- Disable end user personalization of nav items in this app
- Disable temporary tabs for items outside of this app
- Use Omni-Channel sidebar

Utility Items (Desktop Only)

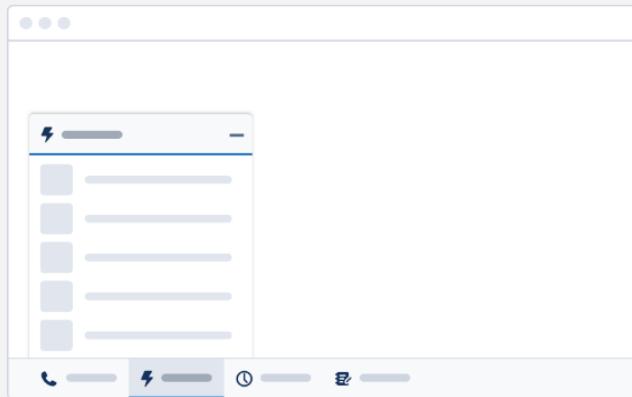
Give your users quick access to productivity tools and add background utility items to your app.

[Add Utility Item](#)

Utility Bar Alignment i

Default

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.



To enable the utility bar for this app, add a utility item.

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

4. To Add Navigation Items:

New Lightning App

Navigation Items

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

Available Items Selected Items

Back Next

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

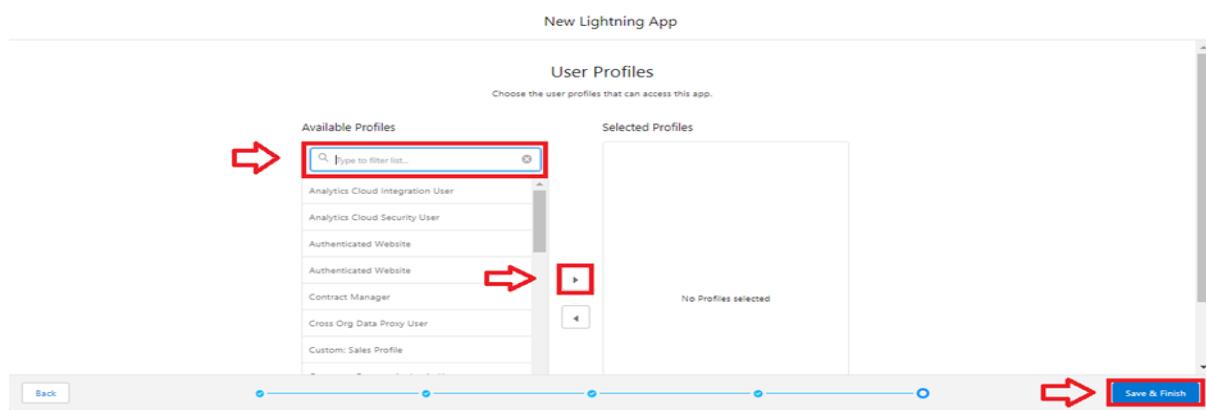
Navigation Items

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

Available Items Selected Items

Back Next

5. To Add User Profiles:



User Profiles

Choose the user profiles that can access this app.

Available Profiles

Type to filter list...
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
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

Selected Profiles

System Administrator

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

Milestone 5 : Fields

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

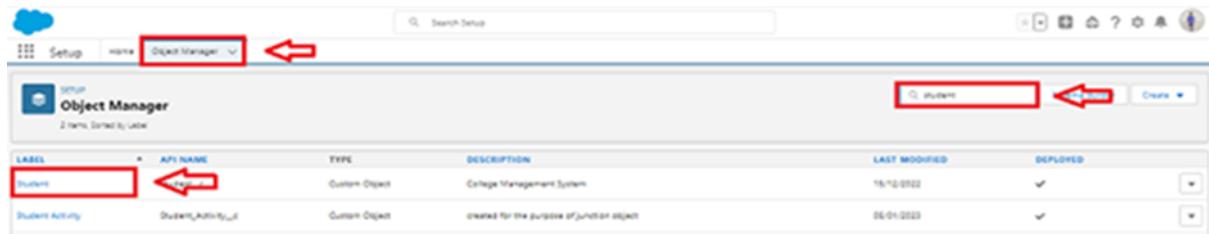
Types of Fields

1. Standard Fields
2. Custom Fields

Activity 1: Creating the number field in rice details object

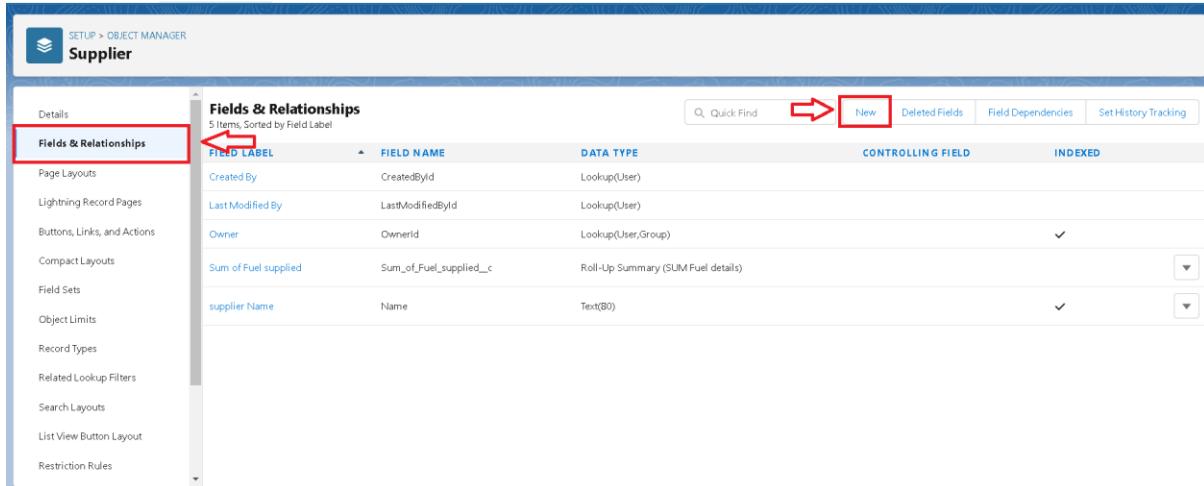
Creating the number field in rice details object

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



The screenshot shows the Salesforce Setup interface. In the top navigation bar, the 'Object Manager' button is highlighted with a red box and a red arrow pointing to it. Below the navigation bar, the 'Object Manager' page is displayed. A search bar at the top right contains the text 'student'. The main table lists two objects: 'Student' (Custom Object) and 'Student Activity' (Custom Object). The 'Student' row is selected, indicated by a red box around its 'Label' column.

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



The screenshot shows the 'Object Manager' page for the 'Supplier' object. The sidebar on the left has a 'Fields & Relationships' link, which is highlighted with a red box and a red arrow. The main area displays a table titled 'Fields & Relationships' with 5 items. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The first row shows 'Created By' with 'CreatedById' as the field name and 'Lookup(User)' as the data type. The second row shows 'Last Modified By' with 'LastModifiedById' as the field name and 'Lookup(User)' as the data type. The third row shows 'Owner' with 'OwnerId' as the field name and 'Lookup(User,Group)' as the data type, with a checkmark in the 'INDEXED' column. The fourth row shows 'Sum of Fuel supplied' with 'Sum_of_Fuel_supplied__c' as the field name and 'Roll-Up Summary (SUMFuel details)' as the data type. The fifth row shows 'supplier Name' with 'Name' as the field name and 'Text(50)' as the data type. The top right of the table area has a 'New' button, which is highlighted with a red box and a red arrow.

3. Select Data type as “Number” and click Next.
4. Given the Field Label as “rice distributed” and length as “5”.
5. Field Name will be auto populated, and click on Next→ Next → Save.

SETUP > OBJECT MANAGER
rice details

Fields & Relationships
7 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
rice details Name	Name	Auto Number		✓
rice distributed	rice_distributed_c	Number(5, 0)		
rice mill 1(one)	rice_mill_1_one_c	Master-Detail(rice mill)		✓
supplier Name	supplier__c	Master-Detail(supplier)		✓
supplier name	supplier_name_c	Number(5, 0)		

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.

SETUP > OBJECT MANAGER
Object Manager

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Student	Student	Custom Object	College Management System	15-10-2022	✓
Student Activity	Student_Activity_c	Custom Object	created for the purpose of junction object	06-01-2023	✓

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

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

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

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

6. Next → Next → Save & New.

7. Follow the same steps from 1 to 3.

8. Select the related object “ rice mill ” and click Next.

9. Give Field Label as “rice mill 1(one)” and click Next.

10. Next → Next → Save.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
rice details Name	Name	Auto Number		✓
rice distributed	rice_distributed_c	Number(5, 0)		▼
rice mill 1(one)	rice_mill_1_one_c	Master-Detail(rice mill)	✓	▼
supplier Name	supplier_c	Master-Detail(supplier)	✓	▼
supplier name	supplier_name_c	Number(5, 0)		▼

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.

Fields & Relationships					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Amount Paid	Amount_Paid__c	Formula(Number)		
Lightning Record Pages	consumer Name	Name	Auto Number		
Buttons, Links, and Actions	Consumer Name	Consumer_Name__c	Formula(Text)		
Compact Layouts	Created By	CreatedById	Lookup(User)		
Field Sets	email	email__c	Email		
Object Limits	First name	First_name__c	Text(100)		
Record Types	Last Modified By	LastModifiedById	Lookup(User)		
Related Lookup Filters	Last name	Last_name__c	Text(100)		
Search Layouts	Mode of payment	Mode_of_payment__c	Picklist		
List View Button Layout	Phone number	Phone_number__c	Phone		
Restriction Rules	Rice mill name	Rice_mill_name__c	Master-Detail(rice mill)		
Scoping Rules	Rice taken by shops	Rice_taken_by_shops__c	Number(5, 0)		
Triggers	rice taken by shops in kgs	Rice_taken_by_shops_in_kgs__c	Number(18, 0)		
Flow Triggers	Rice type	Rice_type__c	Picklist		
Validation Rules					

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.

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	06/01/2023	

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

Step 3. Define the summary calculation

Step 3 of 5

Select Object to Summarize

Master Object: seller
Summarized Object: rice details

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate: rice distributed

Filter Criteria

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

Previous Next Cancel

http://sruniversity-d-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01Id0000019In/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER supplier

Fields & Relationships				
5 items, Sorted by Field Label				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
sum of rice distributed	sum_of_rice_distributed_c	Roll-Up Summary (SUM rice details)		
supplier Name	Name	Text(80)		✓

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.

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

Activity 5 : Creating Fields in Objects

Creating the number field in rice details object

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

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label	<input type="text" value="supplier name"/>	<input type="button" value="i"/>	
Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".			
Length	<input type="text" value="18"/>	Decimal Places	<input type="text" value="0"/>
Field Name	<input type="text"/>	Number of digits to the left of the decimal point	Number of digits to the right of the decimal point
Description	<input type="text"/>		
Help Text	<input type="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 <input type="button" value="i"/>		

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

SETUP > OBJECT MANAGER
rice details

Fields & Relationships
7 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
rice details Name	Name	Auto Number		✓
rice distributed	rice_distributed_c	Number(5, 0)		
rice mill 1(one)	rice_mill_1_one_c	Master-Detail(rice mill)		✓
supplier Name	supplier_c	Master-Detail(supplier)		✓
supplier name	supplier_name_c	Number(5, 0)		

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 ”.

SETUP > OBJECT MANAGER
rice mill

Fields & Relationships
7 items, Sorted by Field Label

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

Activity 7: Creating Fields in consumer Objects

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

The screenshot shows the Salesforce Object Manager interface for the 'consumer' object. The 'Fields & Relationships' tab is selected. The table below lists the fields:

	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Amount Paid	Amount_Paid__c	Formula (Number)		
Lightning Record Pages	consumer Name	Name	Auto Number		
Buttons, Links, and Actions	Consumer Name	Consumer_Name__c	Formula (Text)		
Compact Layouts	Created By	CreatedBy	Lookup(User)		
Field Sets	email	email_c	Email		
Object Limits	First name	First_name__c	Text(100)		
Record Types	Last Modified By	LastModifiedBy	Lookup(User)		
Related Lookup Filters	Last name	Last_name__c	Text(100)		
Search Layouts	Mode of payment	Mode_of_payment__c	Picklist		
List View Button Layout	Phone number	Phone_number__c	Phone		
Restriction Rules	rice mill name	rice_mill_name__c	Master-Detail(rice mill)		
Scoping Rules	Rice taken by shops	Rice_taken_by_shops__c	Number(5, 0)		
Triggers	rice taken by shops in kgs	rice_taken_by_shops_in_kgs__c	Number(18, 0)		
Flow Triggers	Rice type	Rice_type__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.

Step 2 of 5

Field Label <input type="text" value=""/>	Field Name <input type="text" value=""/>
<input type="checkbox"/> Auto add to custom report type <input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity ?	
Formula Return Type <p><input checked="" type="radio"/> None Selected Select one of the data types below.</p> <p><input type="radio"/> Checkbox Calculate a boolean value. Example: [TODAY() > CloseDate]</p> <p><input type="radio"/> Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount. Example: [Gross Margin = Amount - Cost__c]</p> <p><input type="radio"/> Date Calculate a date, for example, by adding or subtracting days to other dates. Example: [Reminder Date = CloseDate - 7]</p> <p><input type="radio"/> Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time. Example: [Leave = NOW() + 4]</p> <p><input checked="" type="radio"/> Number Calculate a numeric value. Example: [Fahrenheit = 1.8 * Celsius__c + 32]</p> <p><input type="radio"/> Percent Calculate a percent and automatically add the percent sign to the number. Example: [Discount = (Amount - Discounted_Amount__c) / Amount]</p>	

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.

The screenshot shows the Salesforce Setup interface for creating a new custom field named 'Amount Paid' on the 'consumer' object. The 'Fields & Relationships' tab is active. In the 'Formula Options' section, the formula is defined as 'Rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c'. The 'Data Type' is set to 'Formula' and 'Decimal Places' is set to 2.

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 setup interface for creating a custom field. The URL is sruniversity-d-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01Id0000019Zch/FieldsAndRelationships/00Nd000002Pw7l.... The page title is "SETUP > OBJECT MANAGER consumer". The left sidebar under "Fields & Relationships" lists various options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main content area shows a "consumer Custom Field Consumer Name" with the API name "Consumer_Name__c". It includes sections for "Field Information" (Field Label: Consumer Name, Field Name: Consumer_Name, API Name: Consumer_Name__c, Description: , Help Text: , Data Owner: , Field Usage: , Data Sensitivity Level: , Compliance Categorization:), "Formula Options" (Data Type: Formula, Formula: First_name__c + ' ' + Last_name__c), and a "Custom Field Definition Detail" header with tabs for Edit, Set Field-Level Security, View Field Accessibility, and Where is this used?. The "Object Name" is listed as "consumer".

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.

The screenshot shows the 'Validation Rule Edit' interface. The rule name is 'phonenumberoremailblankrule', it is marked as Active, and the description is 'phone number and email should not be blank'. The formula field contains the expression 'OR(ISBLANK(phone_number__c), ISBLANK(email__c))'. A tooltip for the 'ABS' function is displayed on the right, showing its definition: 'Returns the absolute value of a number, a number without its sign'. There is also a 'Quick Tips' section with a link to 'Operators & Functions'.

6.

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

Insert Field | Insert Operator ▾

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

AUDS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign

Help on this function

Check Syntax

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message: please fill phone number

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

Error Location: Top of Page Field

Save | Save & New | Cancel

9.

10. Save the validation rule.

The screenshot shows the Salesforce Setup Object Manager interface. The left sidebar lists various object categories like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the 'consumer Validation Rule' detail page. The validation rule has the following details:

- Validation Rule Detail**
- Rule Name:** Phonenumberemailblankrule
- Error Condition Formula:** OR(ISBLANK(Phone_number__c), ISBLANK(email__c))
- Active:**
- Error Message:** please fill in your phone number
- Description:** phone number and email number should not be blank
- Created By:** Saigane Marati | 25/06/2024, 1:58 pm
- Modified By:** Saigane Marati | 25/06/2024, 1:59 pm
- Error Location:** Top of Page

Milestone 6 : Page layouts

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

Activity 1 : creating the page layout

To Create a Page layout:

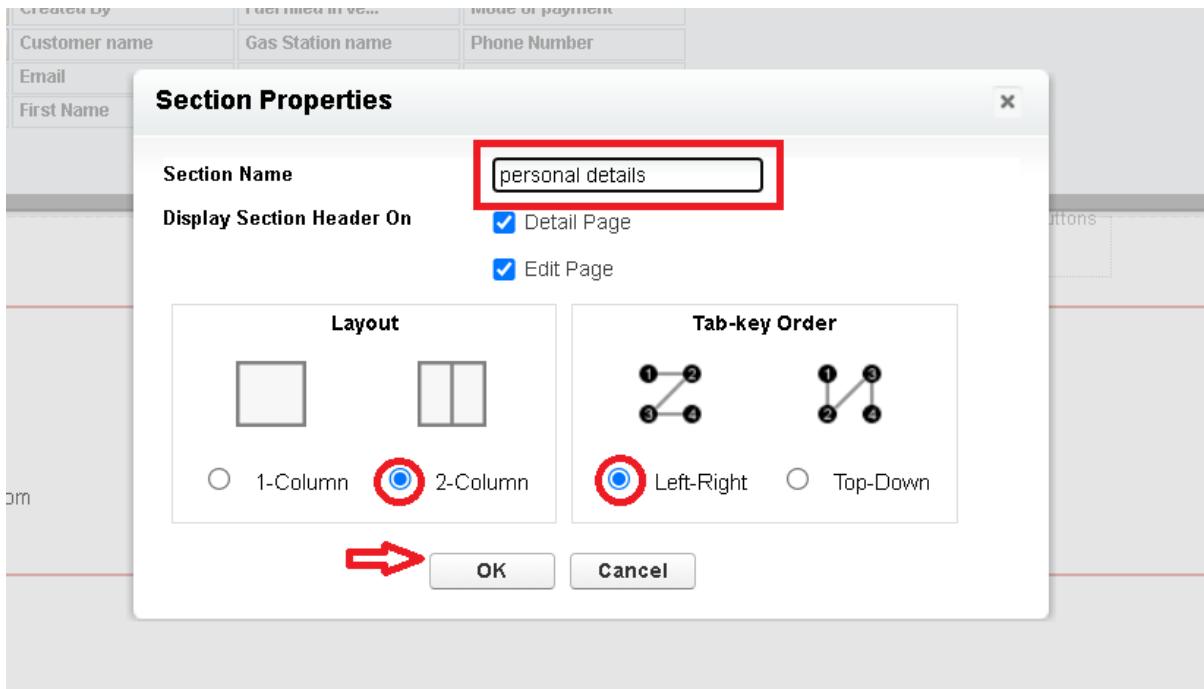
1. Go to Setup → Click on Object Manager → Search for the object (consumer) → From drop down select the object and click on it.
2. Click on Page layout → Click on New.

The screenshot shows the Salesforce Object Manager interface. The left sidebar has 'Page Layouts' selected under 'consumer'. The main area displays a table titled 'Page Layouts' with two items: 'consumer Layout' and 'New consumer layout'. The 'consumer Layout' was created by Saiganesh Marati on 25/06/2024, 11:46 am, and modified by Saiganesh Marati on 25/06/2024, 1:54 pm. The 'New consumer layout' was created by Saiganesh Marati on 25/06/2024, 2:03 pm, and modified by Saiganesh Marati on 25/06/2024, 2:17 pm. The URL in the browser bar is https://sruniversity-d-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01idL0000019ZcH/PageLayouts/view.

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

The screenshot shows the 'Create New Page Layout' dialog. It includes a note about cloning layouts. The 'Existing Page Layout' dropdown is set to 'custom pane' and the 'Page Layout Name' input field contains 'customer layout'. Below the fields are 'Save' and 'Cancel' buttons. A red arrow points to the 'Save' button.

- 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.

Milestone 7 : Profiles

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

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

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

We cannot deleted standard ones

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

2. Custom Profiles:

Custom ones defined by us.

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

Activity 1: owner Profile

To create a new profile:

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

The screenshot shows the 'Profiles' section in the Salesforce Setup. The 'owner' profile is selected. The 'Profile Detail' table includes fields for Name (owner), User License (Salesforce), Description, Created By (udayrushi.yelagandula), Modified By (udayrushi.yelagandula), and a checked 'Custom Profile' checkbox. Below this is a table for 'Page Layouts' mapping standard object layouts to various record types like Global Layout, Object Milestone, etc.

- 2.
3. Scroll down to Custom Object Permissions and Give access permissions for consumers, rice details , rice mill and suppliers objects as mentioned in the below diagram.

The screenshot shows the 'Profiles' section in the Salesforce Setup. The 'owner' profile is selected. The 'Custom Object Permissions' section is expanded, showing checkboxes for 'Basic Access' and 'Data Administration' for objects like consumers, rice details, rice mills, and supplier. Other sections visible include 'Session Settings' and 'Password Policies'.

- 4.
5. Give access and save it.

Activity 2: employer Profile

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

The screenshot shows the Salesforce Setup Profiles page. The left sidebar has a search bar and navigation links for Users and Profiles. The main content area is titled 'Profiles' and shows a grid of permissions for various objects. Under 'Custom Object Permissions', there are two sections: one for 'consumers' and one for 'rice details'. Both sections have tabs for 'Basic Access' and 'Data Administration'. The 'Basic Access' tab includes 'Read', 'Create', 'Edit', 'Delete', 'View All', and 'Modify All'. The 'Data Administration' tab includes 'View All' and 'Modify All'. For 'consumers', 'Read' and 'View All' are checked under 'Basic Access'. For 'rice details', 'Read' and 'View All' are checked under 'Basic Access'. In the bottom section, 'Password Policies', the 'User passwords expire in' field is set to '90 days', 'Enforce password history' is set to '3 passwords remembered', 'Minimum password length' is set to '8', and 'Password complexity requirement' is set to 'Must include alpha and numeric characters'. The 'Password question requirement' is set to 'Cannot contain password'.

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.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar has a search bar and navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area has a header 'Profiles' with a user icon. Below it is a section titled 'Custom Object Permissions' with tables for 'consumers', 'rice details', 'rice mills', and 'supplier'. Another section titled 'Session Settings' includes fields for 'Session Times Out After' (2 hours of inactivity) and 'Session Security Level Required at Login' (None). A 'Password Policies' section contains various configuration options like password expiration (90 days), complexity requirements, and lockout periods.

5. And click save.

Milestone 8 : Role & Role Hierarchy

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

Activity 1: Creating owner Role

Creating owner Role:

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

The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. The left sidebar has a search bar and navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area has a header 'Roles' with a user icon. Below it is a section titled 'Understanding Roles' with a diagram of a role hierarchy. The hierarchy starts with 'Executive Staff' (CEO, President, CFO, VP, Sales) at the top, which oversees 'Western Sales Director' (Director of W. Sales) and 'Eastern Sales Director' (Director of E. Sales). These two directors oversee 'International Sales Director' (Director of Int'l Sales), who oversees 'Western Sales Rep' (CA Sales Rep, OR Sales Rep) and 'Eastern Sales Rep' (NY Sales Rep, MA Sales Rep). At the bottom of the hierarchy are 'Asian Sales Rep' and 'European Sales Rep'. A note states: 'View & edit data, not up forecasts, & generate reports for all users below or at same level of other Executive Staff'. A 'Set Up Roles' button is located at the bottom right of the page.

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

Your Organization's Role Hierarchy

```

graph TD
    NE[Nick Enterprises] --> CEO[CEO]
    CEO --> HR[HR]
    CEO --> Manager[Manager]
    CEO --> OS[On Site Emp]
    CEO --> RE[Remote Emp]
    HR --> AddRole1[Add Role]
    Manager --> AddRole2[Add Role]
    OS --> AddRole3[Add Role]
    RE --> AddRole4[Add Role]
  
```

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

Role Name	Label
owner	owner
employer	owner
worker	owner

2.

- Click and save it.

Activity 2: Creating employer roles

Creating another two roles under manager

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

The screenshot shows the Salesforce Setup Roles page. The left sidebar under 'Users' has 'Roles' selected. The main area shows a 'Role Edit' screen for the 'employer' role. The 'Label' field contains 'employer', and the 'Role Name' field also contains 'employer'. The 'This role reports to' field has 'owner' selected. There are 'Save', 'Save & New', and 'Cancel' buttons at the bottom. A message at the bottom left says 'Didn't find what you're looking for? Try using Global Search.'

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

The screenshot shows the Salesforce Setup Roles page. The left sidebar under 'Users' has 'Roles' selected. The main area shows a 'Role Edit' screen for the 'worker' role. The 'Label' field contains 'worker', and the 'Role Name' field also contains 'worker'. The 'This role reports to' field has 'employer' selected. There are 'Save', 'Save & New', and 'Cancel' buttons at the bottom. A message at the bottom left says 'Didn't find what you're looking for? Try using Global Search.'

Milestone 9 : Users

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

Activity 1: Create User

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

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, there is a sidebar with navigation links for Roles, Feature Settings, Sales, Service, and Case Teams. The main area displays the 'User Detail' page for a user named 'vicky y'. The 'User Detail' section includes fields for Name (vicky y), Alias (vy), Email (maratisaigangesh123@gmail.com), Username (maratisaigangesh123@gmail.com), Nickname (vikki), 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, and various checkboxes for roles 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 (View), Accessibility Mode (Classic Only), Debug Mode, and High-Contrast Palette on Charts. A note at the bottom left says 'Didn't find what you're looking for? Try using Global Search.'

Save it.

Activity 2: creating another users

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

13. Fill in the fields

14. First Name : ram

15. Last Name : ram

16. Alias : Give a Alias Name

17. Email id : Give your Personal Email id

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

19. Nick Name : Give a Nickname

20. Role : employer

21. User license : Salesforce platform

22. Profiles : standard platform user.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, there's a sidebar with navigation links like 'Roles', 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main area displays the 'User Detail' page for a user named 'ram ram'. The user's details include:

Field	Value
Name	ram ram
Alias	ram
Email	ram@gmail.com [Verify]
Username	ram1009@gmail.com
Nickname	ram
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	

On the right side of the detail page, there are several checkboxes for user profiles, with 'employer' being checked. Other profiles listed include 'Salesforce Platform', 'Standard Platform User', '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'.

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

24. Fill in the fields

25. First Name : ragu

26. Last Name : raj

27. Alias : Give a Alias Name

28. Email id : Give your Personal Email id

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

30. Nick Name : Give a Nickname

31. Role : worker

32. User license : Salesforce platform

33. Profiles : standard platform user.

The screenshot shows the Salesforce Setup interface with the 'Users' section selected. A new user record is being created for 'ragu raj'. The 'User Detail' tab is active, showing the following details:

Field	Value
Name	ragu raj
Alias	rraj
Email	rraj@gmail.com [Verify]
Username	rraj1009@gmail.com
Nickname	rraj
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	

On the right side of the screen, there is a list of checkboxes for various user profiles and features. The 'worker' role is checked under 'Role'. Other checked items include 'Salesforce Platform', 'Standard Platform User', and 'Active'. The 'Sharing' tab is currently selected, indicated by a blue bar at the bottom of the tab area.

Milestone 10 : Permission sets

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

Activity 1: Creating OWD setting.

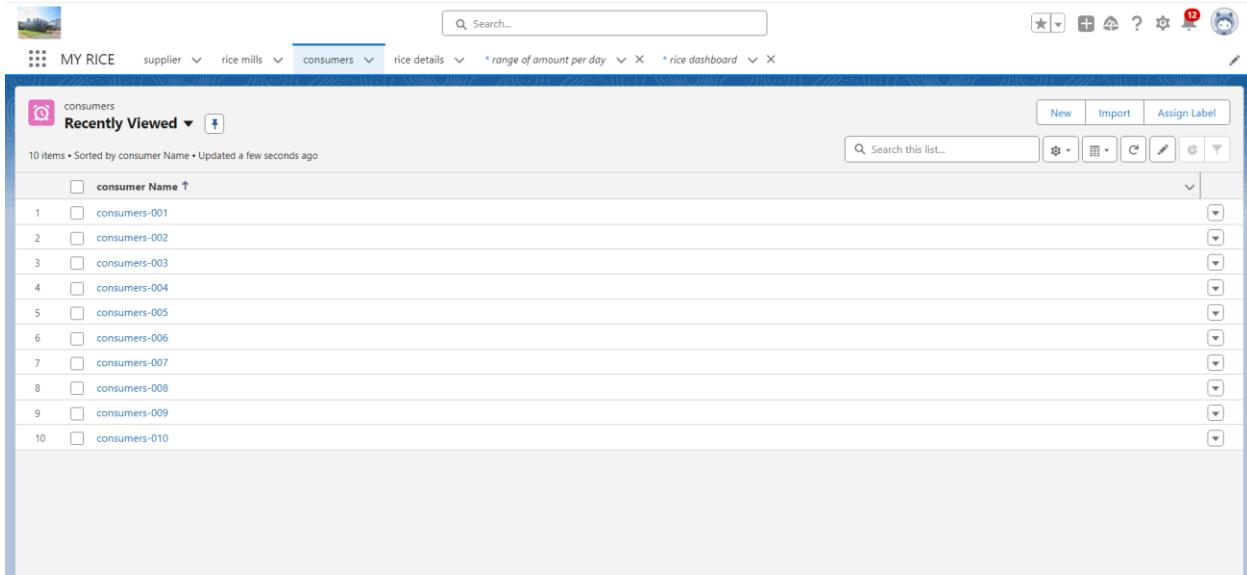
1. Go to setup → type “sharing settings ” in quick search → Click edit.

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The left sidebar has a 'Sharing' section with a 'Sharing Settings' link, which is highlighted with a red arrow. The main content area is titled 'Sharing Settings' and contains a table for 'Organization-Wide Defaults'. The table has columns for 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. Several objects like Lead, Account and Contract, Contact, Order, and Asset are listed with their respective sharing rules. The 'Edit' button in the top right of the table is also highlighted with a red arrow.

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 'Sharing Settings' page in the Salesforce Setup, displaying the updated sharing rules. The 'rice mill' and 'supplier' objects now have 'Public Read Only' as the default internal access, as indicated by red checkmarks in the 'Default Internal Access' column. Other objects like 'Waitlist', 'Web Cart Document', 'Work Order', etc., still have 'Private' as the default internal access. The 'Other Settings' section at the bottom includes options for 'Manager Groups', 'Secure guest user record access', and 'Require permission to view record names in lookup fields'. The 'Sharing Rules' section at the bottom is collapsed.

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



The screenshot shows a Salesforce application window titled "MY RICE". The top navigation bar includes links for "supplier", "rice mills", "consumers", "rice details", "range of amount per day", and "rice dashboard". A search bar is at the top right, and various icons for navigation and actions are present. The main content area is a list titled "Recently Viewed" under the "consumers" tab. It displays 10 items, sorted by consumer name, updated a few seconds ago. The list includes entries from "consumers-001" to "consumers-010".

1	consumer Name
1	consumers-001
2	consumers-002
3	consumers-003
4	consumers-004
5	consumers-005
6	consumers-006
7	consumers-007
8	consumers-008
9	consumers-009
10	consumers-010

Milestone 11 : Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

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

Types of Reports in Salesforce

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

Activity 1: Create Report

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

The screenshot shows the Salesforce Reports page. The URL is sruniversity-d-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=mru. The top navigation bar includes links for 'supplier', 'rice mills', 'consumers', 'rice details', 'range of amount per day', 'rice dashboard', and a search bar. The main area displays a table of recent reports. One report is listed: 'range of amount per day' by 'estimated rice per day' created by 'Saiganesh Marati' on '25/6/2024, 6:28 pm'. The left sidebar contains categories like 'Reports', 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'Folders', 'All Folders', 'Shared with Me', 'Favorites', and 'All Favorites'.

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

The screenshot shows the 'Create Report' dialog. On the left, there is a sidebar with a 'Category' section containing 'Recently Used' and a 'All' section listing various objects: Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, Price Books, Products and Assets. On the right, the main area is titled 'Select a Report Type' with a search bar containing 'cons'. A table lists a single report type: 'Report Type Name' is 'rice mills with consumers' and 'Category' is 'Standard'.

1. Their outline pane is opened already, select the fields that are mentioned below in the column section.
 - 1.consumer name
 - 2.rice type
 - 3.rice price/kg
 - 4.mode of payments

5.amount paid

2. Remove the unnecessary fields.
3. Select the fields that are mentioned below in the GROUP ROWS section.
 - a. Rice taken by shops.

Rice taken by shops	consumer: consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
2 (3)	consumers-008	normal rice	60	Debit card	120.00
	consumers-001	basmati	50	UPI	100.00
	consumers-006	basmati	50	Cash	100.00
					110
					320.00
3 (2)	consumers-002	normal rice	50	Debit card	150.00
	consumers-007	basmati	60	Credit card	180.00
					110
					330.00
4 (1)	consumers-003	basmati	50	Credit card	200.00
					50
					200.00
5 (4)	consumers-009	basmati	60	Net banking	300.00
	consumers-010	normal rice	60	UPI	300.00
	consumers-004	basmati	50	Cash	250.00
	consumers-005	normal rice	60	Net banking	300.00
					110
					1,150.00
	Total (10)				110
					2,000.00

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

Rice taken by shops	consumer: consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
2 (3)	consumers-008	normal rice	60	Debit card	120.00
	consumers-001	basmati	50	UPI	100.00
	consumers-006	basmati	50	Cash	100.00
					110
					320.00
3 (2)	consumers-002	normal rice	50	Debit card	150.00
	consumers-007	basmati	60	Credit card	180.00
					110
					330.00
4 (1)	consumers-003	basmati	50	Credit card	200.00
					50
					200.00
5 (4)	consumers-009	basmati	60	Net banking	300.00
	consumers-010	normal rice	60	UPI	300.00
	consumers-004	basmati	50	Cash	250.00
	consumers-005	normal rice	60	Net banking	300.00
					110
					1,150.00

Activity 2: Sharing report to owner

1. Click edit drop down and select subscribe option

	consumer: consumer name	rice type	rice price/kg	mode of payments	amount paid
Subtotal			50		400.00
8 (1)	A-0003	normal rice	50	Cash	400.00
Subtotal			50		400.00
10 (1)	A-0006	basmati	50	Cash	500.00
Subtotal			50		500.00
12 (1)	A-0007	basmati	50	Cash	600.00
Subtotal			50		600.00
15 (1)	A-0008	basmati	50	Cash	750.00
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

- 2.
3. Follow as per below image.

Frequency
Daily Weekly Monthly

Time
7:00 pm

Attachment
[Attach File](#)

Recipients
Send email to
Me
[Edit Recipients](#)

Run Report As
 Me
 Another Person
Saiganesh Marati

Unsubscribe Cancel Save

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

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

Report results (range of amount per day) [Inbox](#)

Saiganesh Marati [me7yn3e84xrl-5hyuua.ind134.bnc.salesforce.com](#) to me ▾ 19:00 (3 hours ago) ⚡ ⓘ

range of amount per day
As of 28/6/24 at 7:00 PM · Viewing as Saiganesh Marati [OPEN IN SALESFORCE](#)

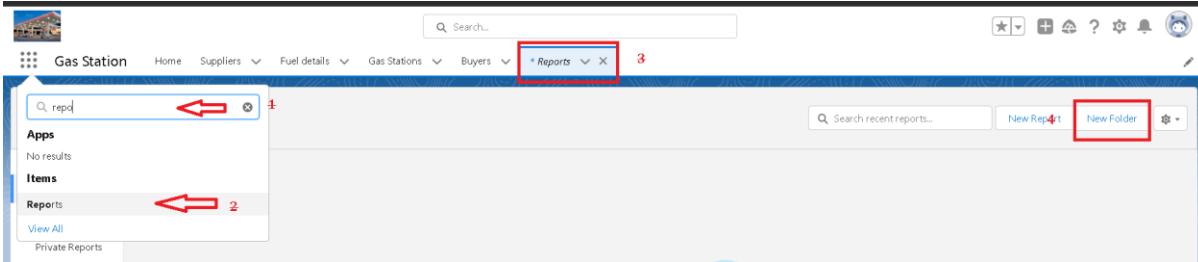
Details
Filters My rice mills rice mill: Created Date: All time

Summary
Total Records Total rice price/kg Total Amount Paid
10 110 2,000.00

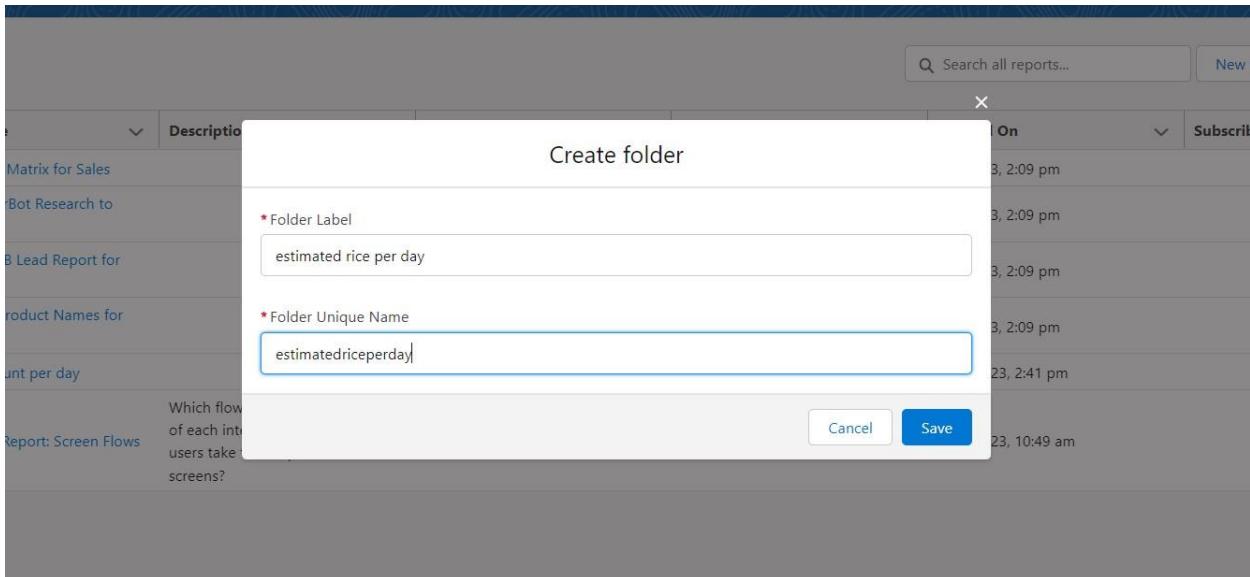
Rice taken by shops	consumer: consumer Name	Rice type	rice price/kg Sum	Mode of payment	Amount Paid Sum
2 (3 records)	consumers-008 consumers-001 consumers-006	normal rice basmati basmati	60 50 50	Debit card UPI Cash	120.00 100.00 100.00
3 (2 records)	consumers-002 consumers-007	normal rice basmati	110 60	Debit card Credit card	320.00 150.00
4 (1 record)	consumers-003	basmati	110 50	Credit card Net banking	330.00 200.00
5 (4 records)	consumers-009 consumers-010	basmati normal rice	60 60	Net banking UPI	300.00 300.00

Activity 3: create a report folder

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



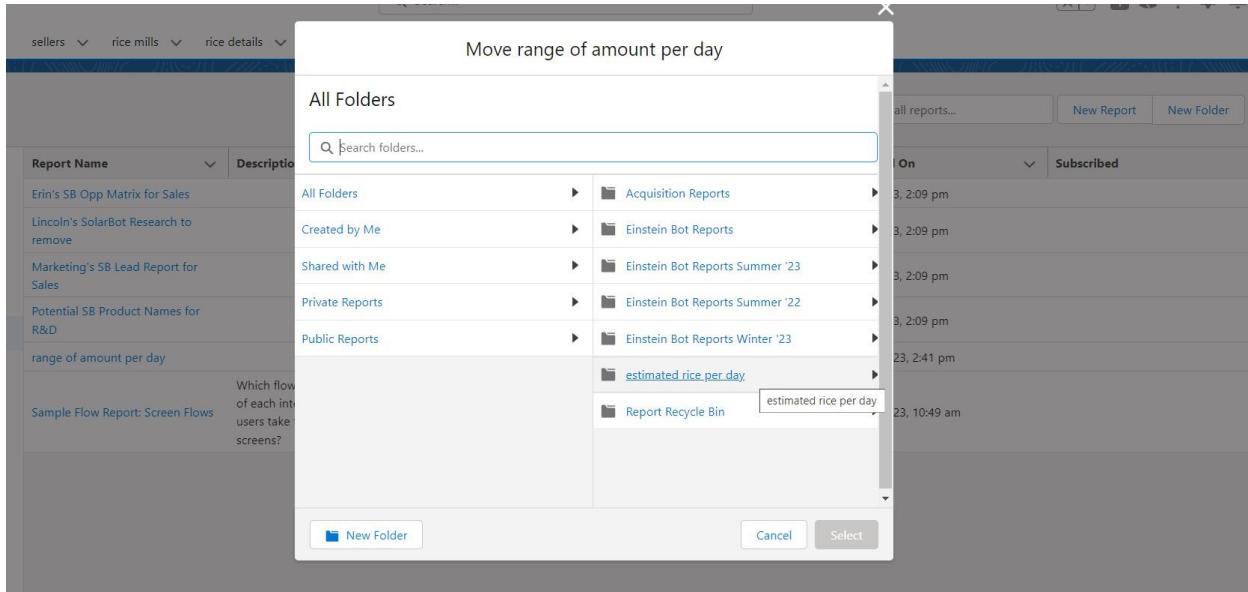
4. Give the Folder label as “estimated rice per day ”, Folder unique name will be auto populated.
5. Click save.



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

The screenshot shows the 'All Reports' page. The sidebar on the left includes sections for Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), Folders (All Folders, Created by Me, Shared with Me), and Favorites (All Favorites). The main content area displays a single report row with the following details: Report Name 'Range of amount per day', Folder 'estimated rice per day', Created By 'Saiganesh Marati', Created On '25/6/2024, 6:28 pm', and a Subscribed checkbox. A search bar at the top right contains the text 'ra'.

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.

Milestone 12 : Dashboards

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

Activity 1: Create Dashboard Folder

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

6.

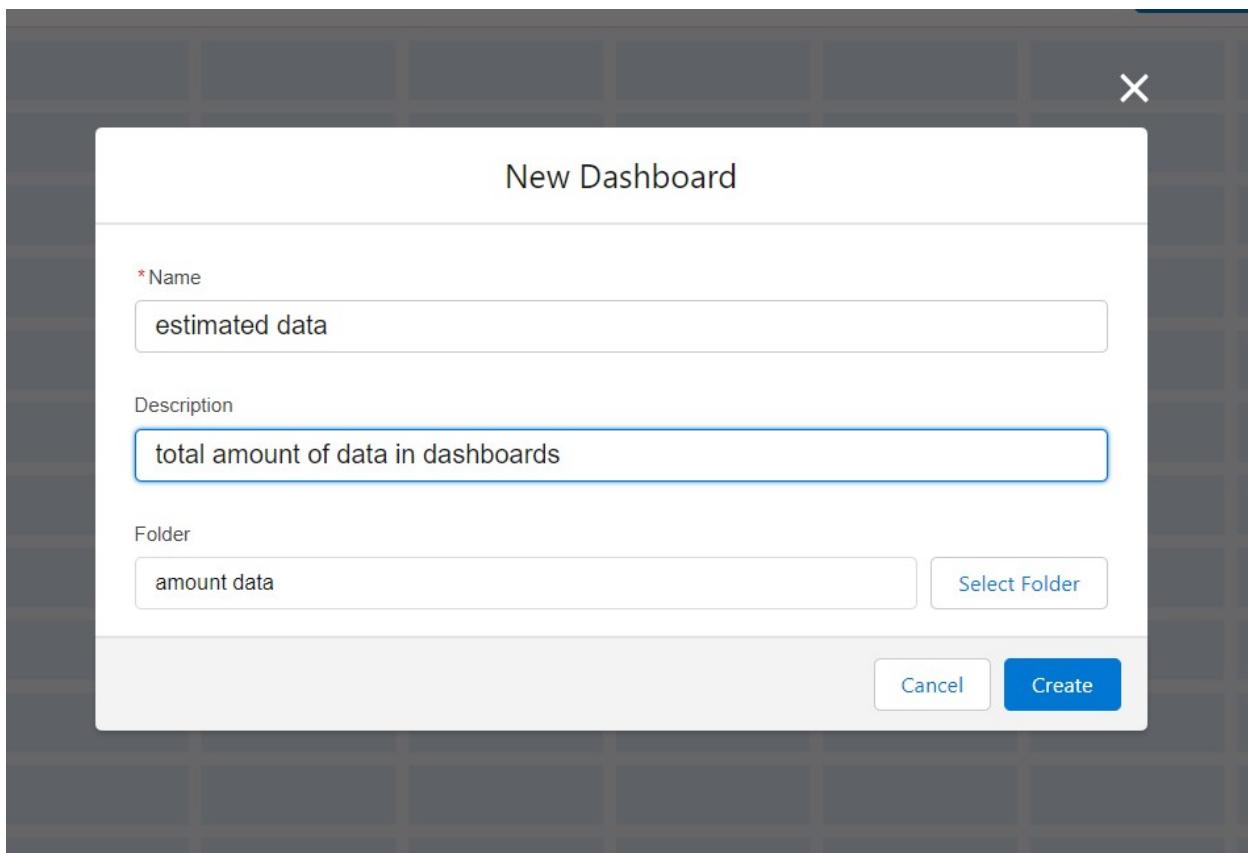
Name	Description	Folder	Created By	Created On	Subscribed
rice dashboard	amount data dashboard	Saiganesh Marati	25/6/2024, 6:45 pm		

Activity 2: Create Dashboard

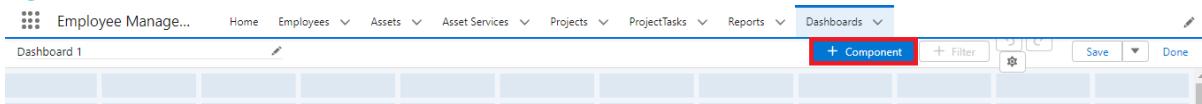
1. Go to the app → click on the Dashboards tabs.

Name	Description	Folder	Created By	Created On	Subscribed
rice dashboard	amount data dashboard	Saiganesh Marati	25/6/2024, 6:45 pm		

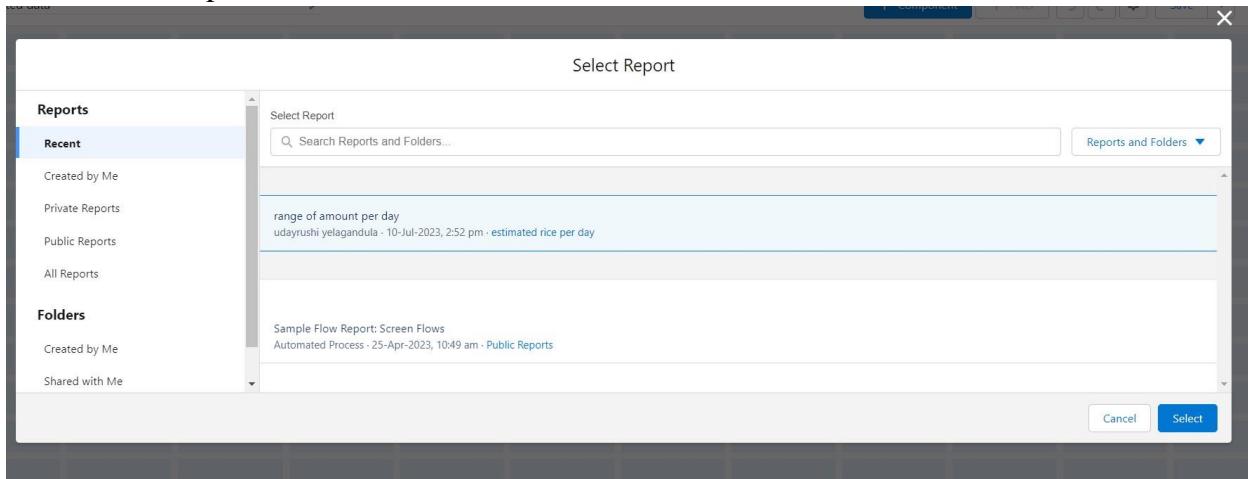
2. Give a Name and select the folder that was created, and click on create.



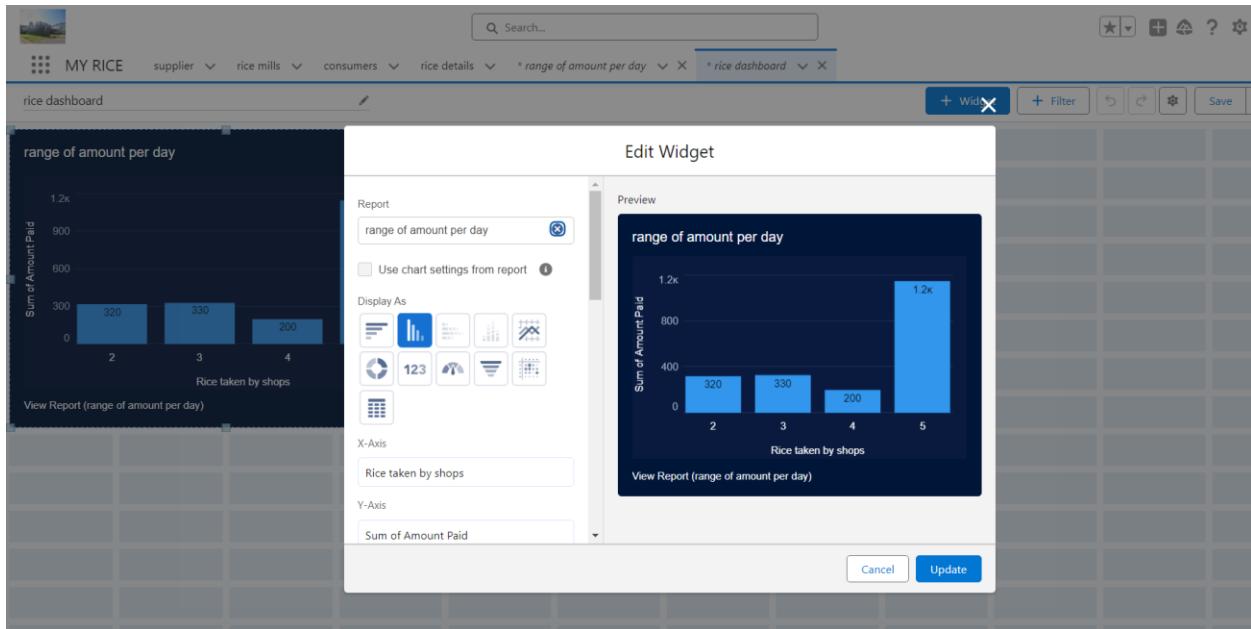
1. Select add widget(component)



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 widget

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.

MY RICE supplier rice mills consumers rice details * range of amount per day * rice dashboard

rice dashboard

range of amount per day

View Report (range of amount per day)

Edit Widget

Report: range of amount per day

Display As: Bar Chart

Value: Sum of Amount Paid

Sliced By: Rice taken by shops

Preview: range of amount per day

Rice taken by shops: 2, 3, 4, 5

Cancel Update

sruniversity-d-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01ZdL000001582nJAA/view?queryScope=userFolders

MY RICE supplier rice mills consumers rice details * range of amount per day * rice dashboard

rice dashboard

As of 28-Jun-2024, 3:18 pm Viewing as Saiganesh Marati

Refresh Edit Subscribe

range of amount per day

View Report (range of amount per day)

range of amount per day

Rice taken by shops: 2, 3, 4, 5

View Report (range of amount per day)