

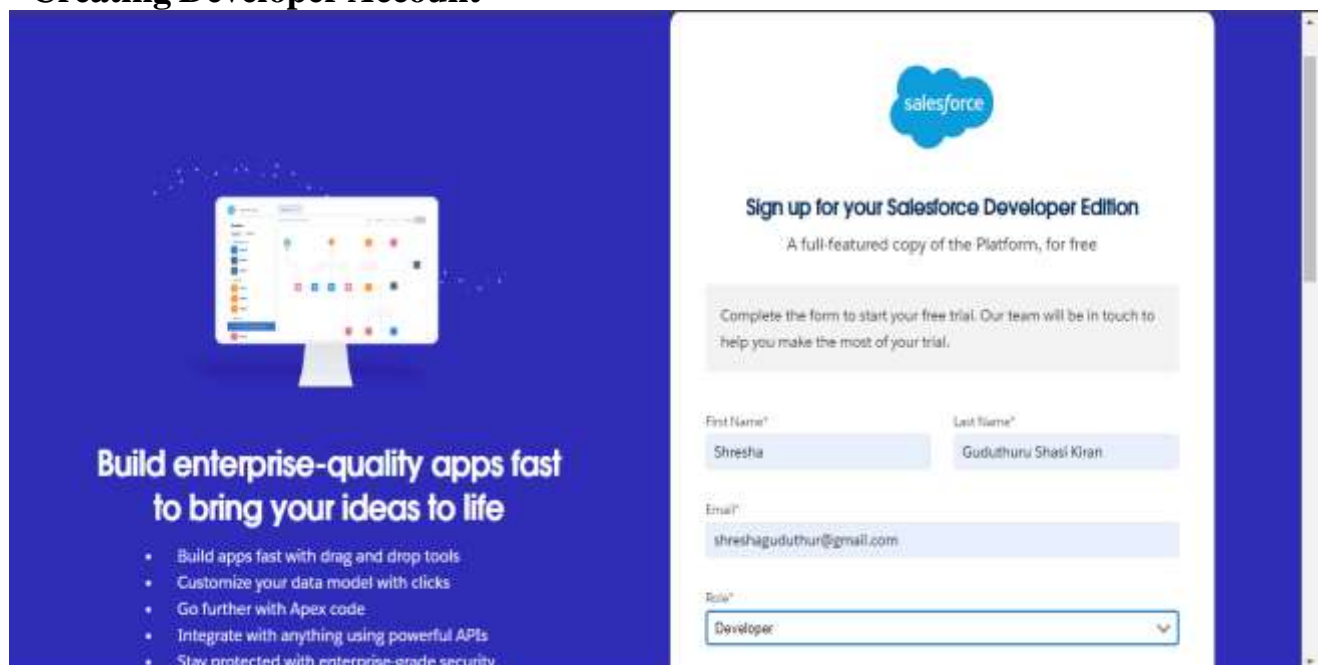
# A CRM APPLICATION FOR WHOLESALE RICE MILL

## 1) Introduction To Salesforce

### What Is Salesforce?

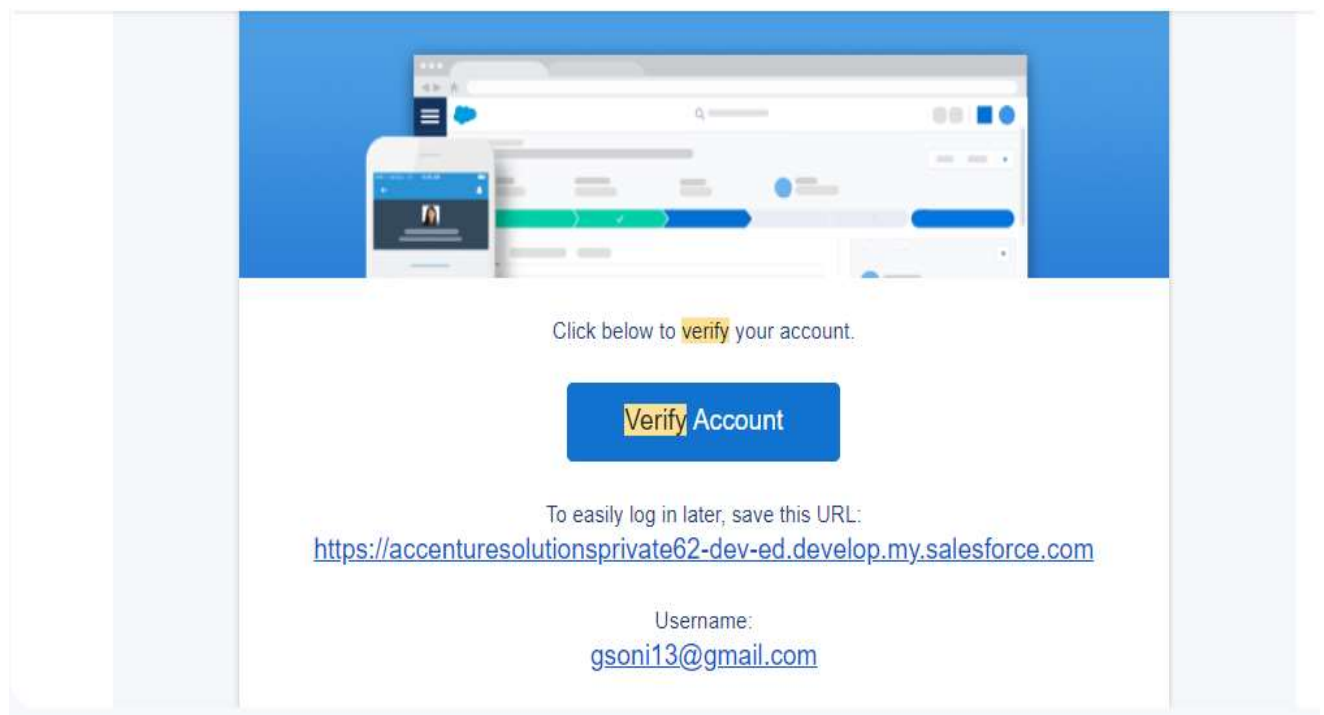
Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

### Creating Developer Account



The image shows the Salesforce Developer Edition sign-up page. On the left, a blue banner features a laptop icon and the text: "Build enterprise-quality apps fast to bring your ideas to life". Below this, a list of bullet points highlights key features: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", and "Stay protected with enterprise-grade security". On the right, the sign-up form is displayed. It includes the Salesforce logo, the heading "Sign up for your Salesforce Developer Edition", and a sub-heading "A full-featured copy of the Platform, for free". A message states: "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." The form fields are: "First Name\*" (Shresha), "Last Name\*" (Guduthuru Shasi Kran), "Email\*" (shreshaguduthur@gmail.com), and "Role\*" (Developer, selected from a dropdown menu).

### Account Activation




The image shows the Salesforce account activation page. At the top, there is a graphic of a laptop and a smartphone displaying a progress bar. Below the graphic, the text reads: "Click below to verify your account." A large blue button labeled "Verify Account" is centered. Below the button, the text says: "To easily log in later, save this URL:" followed by the URL <https://accenturesolutionsprivate62-dev-ed.develop.my.salesforce.com>. At the bottom, the text reads: "Username:" followed by the email address [gsoni13@gmail.com](mailto:gsoni13@gmail.com).

## 2) Object

### What Is an Object?

Salesforce objects are database tables that permit you to store data that is specific to an organization

### Supplier Object

 **SETUP > OBJECT MANAGER**  
**supplier**

**Details**

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

**Details**

EditDelete

Description

API Name  
supplier\_\_c

Custom  
✓

Singular Label  
supplier

Plural Label  
suppliers

Enable Reports  
✓


Track Activities

Track Field History  
✓

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

### Rice Mill Object

 **SETUP > OBJECT MANAGER**  
**rice mill**

**Details**

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

**Details**

EditDelete

Description

API Name  
rice\_mill\_\_c

Custom  
✓

Singular Label  
rice mill

Plural Label  
rice mills

Enable Reports  
✓


Track Activities

Track Field History  
✓

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

## Consumer Objects



SETUP > OBJECT MANAGER

consumer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Details

Edit

Delete

Description

API Name

consumer\_\_c

Custom

✓

Singular Label

consumer

Plural Label

consumers

Enable Reports

✓

Track Activities

Track Field History

✓


Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

## Rice Details Objects



SETUP > OBJECT MANAGER

rice details

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Details

Edit

Delete

Description

API Name

rice\_details\_\_c

Custom

✓

Singular Label

rice details

Plural Label

rice details

Enable Reports

✓

Track Activities

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

### 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.

#### Custom Tab

The screenshot shows the Salesforce Setup interface. On the left, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. A search bar contains 'tabs'. Under 'User Interface', 'Rename Tabs and Labels' is selected, and 'Tabs' is highlighted. The main content area is titled 'SETUP Tabs' and includes a description: 'app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.' Below this, there are three sections: 'Custom Object Tabs' with a table of tabs, 'Web Tabs' (empty), and 'Visualforce Tabs' (empty).


Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	consumers	People	
<a href="#">Edit</a>   <a href="#">Del</a>	rice details	Books	
<a href="#">Edit</a>   <a href="#">Del</a>	rice mills	Box	
<a href="#">Edit</a>   <a href="#">Del</a>	suppliers	Ship	

#### Rice Mill Tab

The screenshot shows the 'Custom Object Tab' definition page for 'rice mills'. It includes a title bar with the 'SETUP Tabs' logo and a 'Help for this Page' link. Below the title, a message states: 'Below is the information for the custom tab. Click Edit to change the custom tab.' The main content area is titled 'Custom Tab Definition Detail' and contains a table with the following information:

Custom Tab Definition Detail		<a href="#">Edit</a>	<a href="#">Delete</a>
Tab Label	rice mills	Tab Style	Box
Object	<a href="#">rice mill</a>	Splash Page Custom Link	
Description			
Created By	<a href="#">Shresha Guduthuru Shasi Kiran.</a> 27/06/2024, 10:47 am	Modified By	<a href="#">Shresha Guduthuru Shasi Kiran.</a> 27/06/2024, 10:47 am

Consumer Tab



SETUP  
Tabs

Custom Object Tab


consumers

Help for this Page ?


Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

EditDelete

Tab Label	consumers	Tab Style	 People
Object	consumer	Splash Page Custom Link	
Description			
Created By	Shresha Guduthuru Shasi Kiran, 27/06/2024, 10:48 am	Modified By	Shresha Guduthuru Shasi Kiran, 27/06/2024, 10:48 am

Rice Details Tab



SETUP  
Tabs

Custom Object Tab


rice details

Help for this Page ?


Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

EditDelete

Tab Label	rice details	Tab Style	 Books
Object	rice_details	Splash Page Custom Link	
Description			
Created By	Shresha Guduthuru Shasi Kiran, 27/06/2024, 10:48 am	Modified By	Shresha Guduthuru Shasi Kiran, 27/06/2024, 10:48 am

## Supplier Tab



SETUP  
Tabs

Custom Object Tab


suppliers

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Edit

Delete

Tab Label	suppliers	Tab Style	 Ship
Object	supplier	Splash Page Custom Link	
Description			
Created By	Shresha Guduthuru Shasi Kiran. 27/06/2024, 10:46 am	Modified By	Shresha Guduthuru Shasi Kiran, 27/06/2024, 10:46 am

Help for this Page ?

## 4)Lightning App

### What is lightning app?

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

## MY RICE

Lightning App Builder

App Settings

Pages

MY RICE

?

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Details & Branding

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

App Details

App Branding

\* App Name

MY\_RICE


\* Developer Name

MY\_RICE

Description

Enter a description...

Image



One


Primary Color Hex Value

#0070C2

Org Theme Options

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

App Launcher Preview

 MY\_RICE

## 5)Fields

Types of Fields

1. Standard Fields
2. Custom Fields

### Standard Fields

The Standard Fields are the predefined fields in Salesforce that perform a standard task.

### Custom Fields

Custom Fields are highly flexible, and users can change them according to requirements.

### Rice Distributed

The screenshot shows the Salesforce Setup interface for the 'rice details' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'rice details Custom Field' and 'rice distributed'. It includes a 'Back to rice details' link and a 'Validation Rules (0)' link. Below this is the 'Custom Field Definition Detail' section with buttons for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table is displayed below.


Field Information			
Field Label	rice distributed	Object Name	rice details
Field Name	rice_distributed	Data Type	Number
API Name	rice_distributed__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance			

### Supplier Name

The screenshot shows the Salesforce Setup interface for the 'rice details' object, specifically for the 'supplier Name' custom field. The left sidebar is identical to the previous screenshot. The main content area is titled 'rice details Custom Field' and 'supplier Name'. It includes a 'Back to rice details' link and a 'Validation Rules (0)' link. Below this is the 'Custom Field Definition Detail' section with buttons for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table is displayed below.

Field Information			
Field Label	supplier Name	Object Name	rice details
Field Name	supplier_Name	Data Type	Master-Detail
API Name	supplier_Name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

## Rice Mill 1(one)

 **SETUP > OBJECT MANAGER**  
**rice details**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

rice details Custom Field

**rice mill 1(one)**

[Back to rice details](#)

[Validation Rules \(0\)](#)

Edit

Set Field-Level Security

View Field Accessibility


Where is this used?

**Custom Field Definition Detail**

**Field Information**

Field Label	rice mill 1(one)	Object Name	<a href="#">rice details</a>
Field Name	rice_mill_1_one	Data Type	Master-Detail
API Name	rice_mill_1_one__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

## Rice Mill Name

 **SETUP > OBJECT MANAGER**  
**consumer**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

consumer Custom Field

**rice mill name**

[Back to consumer](#)

[Validation Rules \(0\)](#)

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?


**Custom Field Definition Detail**

**Field Information**

Field Label	rice mill name	Object Name	<a href="#">consumer</a>
Field Name	rice_mill_name	Data Type	Master-Detail
API Name	rice_mill_name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			



## Sum of Rice Distributed

 **SETUP > OBJECT MANAGER**  
**consumer**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

consumer Custom Field

**First name**

[Back to consumer](#)

[Validation Rules](#) (0)

Edit

Set Field-Level Security

View Field Accessibility


Where is this used?

**Custom Field Definition Detail**

Field Information

Field Label	First name	Object Name	<u>consumer</u>
Field Name	First_name	Data Type	Text
API Name	First_name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

## Sum of Rice Distributed

 **SETUP > OBJECT MANAGER**  
**supplier**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

supplier Custom Field

**sum of rice distributed**

[Back to supplier](#)

[Validation Rules](#) (0)

Edit

Set Field-Level Security

View Field Accessibility


Where is this used?

**Custom Field Definition Detail**

Field Information

Field Label	sum of rice distributed	Object Name	<u>supplier</u>
Field Name	sum_of_rice_distributed		
API Name	sum_of_rice_distributed__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

## Rice Distributed to Shops

 **SETUP > OBJECT MANAGER**  
**supplier**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

supplier Custom Field

rice distributed to shops

[Back to supplier](#)

Edit

Set Field-Level Security

View Field Accessibility


Where is this used?

**Custom Field Definition Detail**

Field Information

Field Label	rice distributed to shops	Object Name	<u>supplier</u>
Field Name	rice_distributed_to_shops		
API Name	rice_distributed_to_shops__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

## Rice Taken by Shops in kgs

 **SETUP > OBJECT MANAGER**  
**consumer**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

consumer Custom Field

rice taken by shops in kgs

[Back to consumer](#)

Validation Rules (0)

Edit

Set Field-Level Security

View Field Accessibility


Where is this used?

**Custom Field Definition Detail**

Field Information

Field Label	rice taken by shops in kgs	Object Name	<u>consumer</u>
Field Name	rice_taken_by_shops_in_kgs	Data Type	Number
API Name	rice_taken_by_shops_in_kgs__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

## Rice Taken

 **SETUP > OBJECT MANAGER**  
**rice mill**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

rice mill Custom Field

**rice taken**

[Back to rice mill](#)

Help for this Page ?

Edit

Set Field-Level Security

View Field Accessibility


Where is this used?

Custom Field Definition Detail

Field Information

Field Label	rice taken	Object Name	rice mill
Field Name	rice_taken		
API Name	rice_taken__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

## Rice price/kg

 **SETUP > OBJECT MANAGER**  
**rice mill**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

rice mill Custom Field

**rice price/kg**

[Back to rice mill](#)

Validation Rules (0)

Help for this Page ?

Edit

Set Field-Level Security

View Field Accessibility


Where is this used?

Custom Field Definition Detail

Field Information

Field Label	rice price/kg	Object Name	rice mill
Field Name	rice_price_kg	Data Type	Number
API Name	rice_price_kg__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

# First Name

 [SETUP > OBJECT MANAGER](#)

**consumer**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

consumer Custom Field

First name

[Back to consumer](#)

[Validation Rules](#) (0)

Edit

Set Field-Level Security

View Field Accessibility


Where is this used?

**Custom Field Definition Detail**

**Field Information**

Field Label	First name	Object Name	<u>consumer</u>
Field Name	First_name	Data Type	Text
API Name	First_name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

# Last Name

 [SETUP > OBJECT MANAGER](#)

**consumer**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

consumer Custom Field

Last name

[Back to consumer](#)

[Validation Rules](#) (0)

Edit

Set Field-Level Security

View Field Accessibility


Where is this used?

**Custom Field Definition Detail**

**Field Information**

Field Label	Last name	Object Name	<u>consumer</u>
Field Name	Last_name	Data Type	Text
API Name	Last_name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

## Phone Number

 **SETUP > OBJECT MANAGER**  
**consumer**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

consumer Custom Field

**Phone number**

[Back to consumer](#)

[Validation Rules](#) (0)

Edit

Set Field-Level Security

View Field Accessibility


Where is this used?

**Custom Field Definition Detail**

**Field Information**

Field Label	Phone number	Object Name	<a href="#">consumer</a>
Field Name	Phone_number	Data Type	Phone
API Name	Phone_number__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

## Email

 **SETUP > OBJECT MANAGER**  
**consumer**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

consumer Custom Field

**email**

[Back to consumer](#)

[Validation Rules](#) (0)

Edit

Set Field-Level Security

View Field Accessibility


Where is this used?

**Custom Field Definition Detail**

**Field Information**

Field Label	email	Object Name	<a href="#">consumer</a>
Field Name	email	Data Type	Email
API Name	email__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

## Rice taken by shops

 **SETUP > OBJECT MANAGER**  
**consumer**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

consumer Custom Field

**Rice taken by shops**

[Back to consumer](#)

[Validation Rules \[0\]](#)

Edit

Set Field-Level Security

View Field Accessibility


Where is this used?

**Custom Field Definition Detail**

**Field Information**

Field Label	Rice taken by shops	Object Name	<u>consumer</u>
Field Name	Rice_taken_by_shops	Data Type	Number
API Name	Rice_taken_by_shops__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

## Rice Type

 **SETUP > OBJECT MANAGER**  
**consumer**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

consumer Custom Field

**Rice type**

[Back to consumer](#)

[Validation Rules \[0\]](#)

Edit

Set Field-Level Security

View Field Accessibility


Where is this used?

**Custom Field Definition Detail**

**Field Information**

Field Label	Rice type	Object Name	<u>consumer</u>
Field Name	Rice_type	Data Type	Picklist
API Name	Rice_type__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

## Mode of Payment

 **SETUP > OBJECT MANAGER**  
**consumer**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

consumer Custom Field

Mode of payment

[Back to consumer](#)

[Help for this Page](#) ?

[Validation Rules \(0\)](#)

Edit

Set Field-Level Security

View Field Accessibility


Where is this used?

**Custom Field Definition Detail**

Field Information

Field Label	Mode of payment	Object Name	<a href="#">consumer</a>
Field Name	Mode_of_payment	Data Type	Picklist
API Name	Mode_of_payment__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

## Amount Paid

 **SETUP > OBJECT MANAGER**  
**consumer**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

consumer Custom Field

Amount Paid

[Back to consumer](#)

[Help for this Page](#) ?

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?


**Custom Field Definition Detail**

Field Information

Field Label	Amount Paid	Object Name	<a href="#">consumer</a>
Field Name	Amount_Paid		
API Name	Amount_Paid__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

## Consumer Name

SETUP > OBJECT MANAGER

 consumer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

consumer Custom Field

Consumer Name

Back to consumer

Help for this Page ?

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility


Where is this used?

Field Information

Field Label	Consumer Name	Object Name	consumer
Field Name	Consumer_Name		
API Name	Consumer_Name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

## Consumer Validation Rule

SETUP > OBJECT MANAGER

 consumer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

consumer Validation Rule

Back to consumer

Help for this Page ?

Validation Rule Detail

Edit

Clone

Rule Name	Phonenumberoremailblankrule	Active	✓
Error Condition Formula	OR( ISBLANK( Phone_number__c ) , ISBLANK( email__c ) )		
Error Message	please fill in your phone number.	Error Location	Top of Page
Description	phone number and email number should not be blank		
Created By	Shresha Guduthuru Shasi Kiran, 27/06/2024, 11:41 am	Modified By	Shresha Guduthuru Shasi Kiran, 27/06/2024, 11:41 am

Edit

Clone



## 6)Page Layouts

Page Layout in Salesforce allows us to customize the design and organize detail and edit pages of records in Salesforce.

### Consumer Layout

The screenshot shows the Salesforce Setup interface for the 'consumer' object. The left sidebar lists various setup options, with 'Page Layouts' selected. The main content area displays a table of page layouts for the 'consumer' object. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. A single row is visible, showing 'consumer Layout' created by 'Shresha Guduthuru' and 'Shasi Kiran' on 27/06/2024 at 10:43 am, and modified by 'Shresha Guduthuru' and 'Shasi Kiran' on 27/06/2024 at 12:00 pm. There are buttons for 'New' and 'Page Layout Assignment' at the top right of the table.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
consumer Layout	Shresha Guduthuru Shasi Kiran, 27/06/2024, 10:43 am	Shresha Guduthuru Shasi Kiran, 27/06/2024, 12:00 pm

## 7)Profiles


A profile is a group/collection of settings and permissions that define what a user can do in salesforce.

### Owner Profile

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The 'owner' profile is selected. The page displays a list of permissions for the 'owner' profile, including 'Login IP Ranges', 'Enabled Apex Class Access', 'Enabled Visualforce Page Access', 'Enabled External Data Source Access', 'Enabled Named Credential Access', 'Enabled External Credential Principal Access', 'Enabled Custom Metadata Type Access', 'Enabled Custom Setting Definitions Access', 'Enabled Flow Access', 'Enabled Service Presence Status Access', and 'Enabled Custom Permissions'. Below the permissions list, there is a 'Profile Detail' section with buttons for 'Edit', 'Clone', 'Delete', and 'View Users'. The 'owner' profile is shown with a 'User License' of 'Salesforce' and a 'Custom Profile' checkbox that is checked.

Profile Detail
Name: owner
User License: Salesforce
Custom Profile: <input checked="" type="checkbox"/>

Employer Profile



SETUP

Profiles

Profile

employer

Help for this Page ?

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

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

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) | [Enabled External Credential Principal Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[0\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) | [Enabled Custom Permissions \[0\]](#)

Profile Detail

Edit


Clone

Delete

View Users

Name	employer		
User License	Salesforce Platform	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	<a href="#">Shresha Guduthuru</a> <a href="#">Shasi Kiran</a> 27/06/2024	Modified By	<a href="#">Shresha Guduthuru</a> <a href="#">Shasi Kiran</a> 27/06/2024

Worker Profile



SETUP

Profiles

Profile

worker

Help for this Page ?

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

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

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) | [Enabled External Credential Principal Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[0\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) | [Enabled Custom Permissions \[0\]](#)

Profile Detail

Edit

Clone

Delete

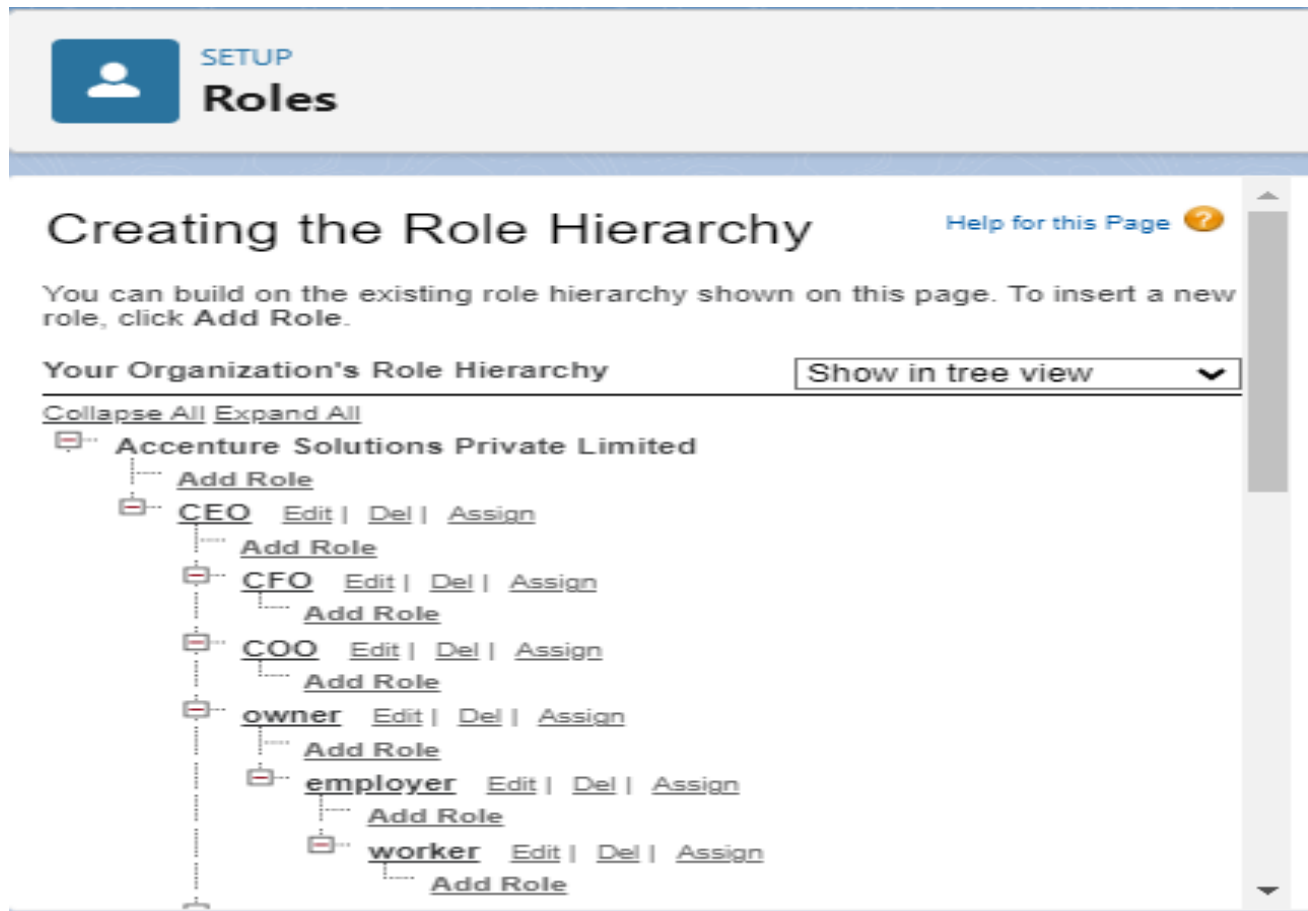
View Users

Name	worker		
User License	Salesforce Platform	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	<a href="#">Shresha Guduthuru</a>	Modified By	<a href="#">Shresha Guduthuru</a>

## 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.

### Owner Role & Employer Role



The screenshot displays the 'Roles' page in Salesforce Setup. The page title is 'Roles' with a 'SETUP' link. The main heading is 'Creating the Role Hierarchy', with a 'Help for this Page' link. Below the heading, a message states: 'You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.' The section 'Your Organization's Role Hierarchy' includes a 'Show in tree view' dropdown menu. The role hierarchy is shown as a tree structure for 'Accenture Solutions Private Limited'. The hierarchy starts with 'Accenture Solutions Private Limited' at the top, followed by 'CEO', 'CFO', 'COO', 'owner', 'employer', and 'worker'. Each role has an 'Add Role' link below it, and the roles 'owner', 'employer', and 'worker' have 'Edit', 'Del', and 'Assign' links. The 'Collapse All' and 'Expand All' links are also visible.

```
graph TD; A[Accenture Solutions Private Limited] --> B[CEO]; A --> C[CFO]; A --> D[COO]; A --> E[owner]; A --> F[employer]; A --> G[worker]; B --> B1[Add Role]; C --> C1[Add Role]; D --> D1[Add Role]; E --> E1[Add Role]; F --> F1[Add Role]; G --> G1[Add Role]; E --> E2[Edit]; E --> E3[Del]; E --> E4[Assign]; F --> F2[Edit]; F --> F3[Del]; F --> F4[Assign]; G --> G2[Edit]; G --> G3[Del]; G --> G4[Assign];
```

## 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.



## SETUP Users

User  
vicky y

[User Profile](#) [Help for this Page](#)

[Permission Set Assignments](#) [0] | [Permission Set Assignments: Activation Required](#) [0] |  
[Permission Set Group Assignments](#) [0] | [Permission Set License Assignments](#) [0] |  
[Personal Groups](#) [0] | [Public Group Membership](#) [0] | [Queue Membership](#) [0] |  
[Team](#) [0] | [Managers in the Role Hierarchy](#) [0] | [OAuth Apps](#) [0] |  
[Third-Party Account Links](#) [0] | [Installed Mobile Apps](#) [0] |  
[Authentication Settings for External Systems](#) [0] | [Login History](#) [0+] |  
[User Provisioning Accounts](#) [0]

### User Detail

[Edit](#) [Sharing](#) [Reset Password](#)  
[Freeze](#) [View Summary](#)

Name	vicky y	Role	owner
Alias	vy	User License	Salesforce
Email	<a href="#">guduthurshresha@gmail.com</a> <a href="#">[Verify]</a>	Profile	owner
Username	<a href="#">guduthurshresha@1311gmail.com</a>	Active	<input checked="" type="checkbox"/>
Nickname	vicky	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge	<input type="checkbox"/>



## SETUP Users

User  
ragu raj


[User Profile](#) [Help for this Page](#)

[Permission Set Assignments](#) [0] | [Permission Set Assignments: Activation Required](#) [0] |  
[Permission Set Group Assignments](#) [0] | [Permission Set License Assignments](#) [0] |  
[Personal Groups](#) [0] | [Public Group Membership](#) [0] | [Queue Membership](#) [0] |  
[Team](#) [0] | [Managers in the Role Hierarchy](#) [2] | [OAuth Apps](#) [0] |  
[Third-Party Account Links](#) [0] | [Installed Mobile Apps](#) [0] |  
[Authentication Settings for External Systems](#) [0] | [Login History](#) [0+] |  
[User Provisioning Accounts](#) [0]

### User Detail

[Edit](#) [Sharing](#) [Reset Password](#)  
[Freeze](#) [View Summary](#)

Name	ragu raj	Role	worker
Alias	rraj	User License	Salesforce Platform
Email	<a href="#">shreshag999@gmail.com</a> <a href="#">[Verify]</a>	Profile	<a href="#">Standard Platform User</a>
Username	<a href="#">shreshag99900@gmail.com</a>	Active	<input checked="" type="checkbox"/>
Nickname	ragu	Marketing User	<input type="checkbox"/>




SETUP

Users

User

ram ram


[User Profile Help for this Page](#)

[Permission Set Assignments \[0\]](#) | 
 [Permission Set Assignments: Activation Required \[0\]](#) | 
 [Permission Set Group Assignments \[0\]](#) | 
 [Permission Set License Assignments \[0\]](#) | 
 [Personal Groups \[0\]](#) | 
 [Public Group Membership \[0\]](#) | 
 [Queue Membership \[0\]](#) | 
 [Team \[0\]](#) | 
 [Managers in the Role Hierarchy \[1\]](#) | 
 [OAuth Apps \[0\]](#) | 
 [Third-Party Account Links \[0\]](#) | 
 [Installed Mobile Apps \[0\]](#) | 
 [Authentication Settings for External Systems \[0\]](#) | 
 [Login History \[0+\]](#) | 
 [User Provisioning Accounts \[0\]](#)

User Detail



Edit

Sharing

Reset Password

Freeze

View Summary

Name	ram ram	Role	employer
Alias	r ram	User License	Salesforce Platform
Email	<a href="#">gshresha13@gmail.com</a> [Verify] 	Profile	<a href="#">Standard Platform User</a>
Username	gshresha1311@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	ram 	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>

## 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.

### OWD Setting

SETUP Sharing Settings			
User Provisioning Request	Private	Private	<input checked="" type="checkbox"/>
Waitlist	Private	Private	<input checked="" type="checkbox"/>
Web Cart Document	Private	Private	<input checked="" type="checkbox"/>
Work Order	Private	Private	<input checked="" type="checkbox"/>
Work Plan	Private	Private	<input checked="" type="checkbox"/>
Work Plan Template	Private	Private	<input checked="" type="checkbox"/>
Work Step Template	Private	Private	<input checked="" type="checkbox"/>
Work Type	Private	Private	<input checked="" type="checkbox"/>
Work Type Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
consumer	Controlled by Parent	Controlled by Parent	
rice details	Controlled by Parent	Controlled by Parent	
rice mill	Public Read Only	Private	<input checked="" type="checkbox"/>
supplier	Public Read Only	Private	<input checked="" type="checkbox"/>

## 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.

### Consumer Records

MY RICE		suppliers	rice mills	consumers	Reports	More
consumers		Recently Viewed				New Import Assign Label
10 items • Updated a few seconds ago		Search this list...				
consumer Name						
1	consumers-010					
2	consumers-009					
3	consumers-008					
4	consumers-007					
5	consumers-006					
6	consumers-005					
7	consumers-004					
8	consumers-003					
9	consumers-002					
10	consumers-001					

### Report of Range of amount per day

MY RICE		suppliers	rice mills	consumers	Reports	More
Recent		Search recent reports...				New Report New Folder
1 item						
REPORTS		Repo...	Descr...	Folder	Creat...	Creat...
Recent		range of amount per day	estimated rice per day	Shresha Guduthuru Shasi Kiran	27/6/2024, 1:24 pm	✓
Created by Me						
Private Reports						
Public Reports						
All Reports						



## Report: rice mills with consumers range of amount per day

Total Records: 10  
Total rice price/kg: 800  
Total Amount Paid: 54,189.00

<input type="checkbox"/> Rice taken by shops: ↑	consumer: consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
<input type="checkbox"/> 24 (T)	consumers-007	1.basmati	80	• Debit card	2,160.00
Subtotal			80		2,160.00
<input type="checkbox"/> 40 (T)	consumers-007	2.normal rice	78	• Debit card	4,815.00
Subtotal			78		4,815.00
<input type="checkbox"/> 50 (T)	consumers-007	2.normal rice	75	• LPI	4,150.00
Subtotal			75		4,150.00
<input type="checkbox"/> 54 (T)	consumers-008	2.normal rice	47	• Fast banking	2,538.00
Subtotal			47		2,538.00
<input type="checkbox"/> 70 (T)	consumers-009	1.basmati	80	• Debit card	5,600.00
Subtotal			80		5,600.00
<input type="checkbox"/> 78 (T)	consumers-008	1.basmati	80	• Credit card	7,000.00
Subtotal			80		7,000.00
<input type="checkbox"/> 80 (G)	consumers-009	2.normal rice	40	• Fast banking	3,200.00
	consumers-009	1.basmati	89	• Fast banking	7,120.00
Subtotal			129		10,320.00
<input type="checkbox"/> 87 (T)	consumers-003	1.basmati	150	• Cash	13,050.00
Subtotal			150		13,050.00
<input type="checkbox"/> 90 (T)	consumers-010	2.normal rice	60	• Cash	5,880.00
Subtotal			60		5,880.00

## Sharing Report to Owner

[Edit Subscription](#)

### Settings

Frequency

☒ Daily

☐ Weekly

☐ Monthly

Time

8:00 am

Attachment

[Attach File](#)

### Recipients

Send email to

Me

[Edit Recipients](#)

Run Report As

☒ Me

☐ Another Person

### Conditions

In addition to subscribing, you can set up conditions on this report. You will be notified when conditions are met. This is optional.

☐ Add conditions to this report

[Unsubscribe](#)

[Cancel](#)

[Save](#)



## Report Tab on MY RICE app

MY RICE suppliers rice mills consumers rice details Reports Dashboards

Reports Recent 1 item

Search recent reports... New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	range of amount per day	estimated rice per day	estimated rice per day	Shresha Guduthuru Shasi Kiran	27/6/2024, 1:24 pm	✓
Created by Me						
Private Reports						
Public Reports						

## 12) Dashboard

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports.

### Dashboard Folder

Dashboards Recent 1 item

Search recent dashboards... New Dashboard New Folder

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	estimated data	total amount of data in dashboards	amount data dashboard	Shresha Guduthuru Shasi Kiran	27/6/2024, 1:25 pm	✓
Created by Me						
Private Dashboards						
All Dashboards						

FOLDERS

All Folders

Created by Me

### Dashboard tab

Dashboard estimated data

total amount of data in dashboards

As of 01-Jul-2024, 12:28 pm Viewing as Shresha Guduthuru Shasi Kiran

Refresh Edit Subscribe

range of amount per day

Sum of Amount Paid

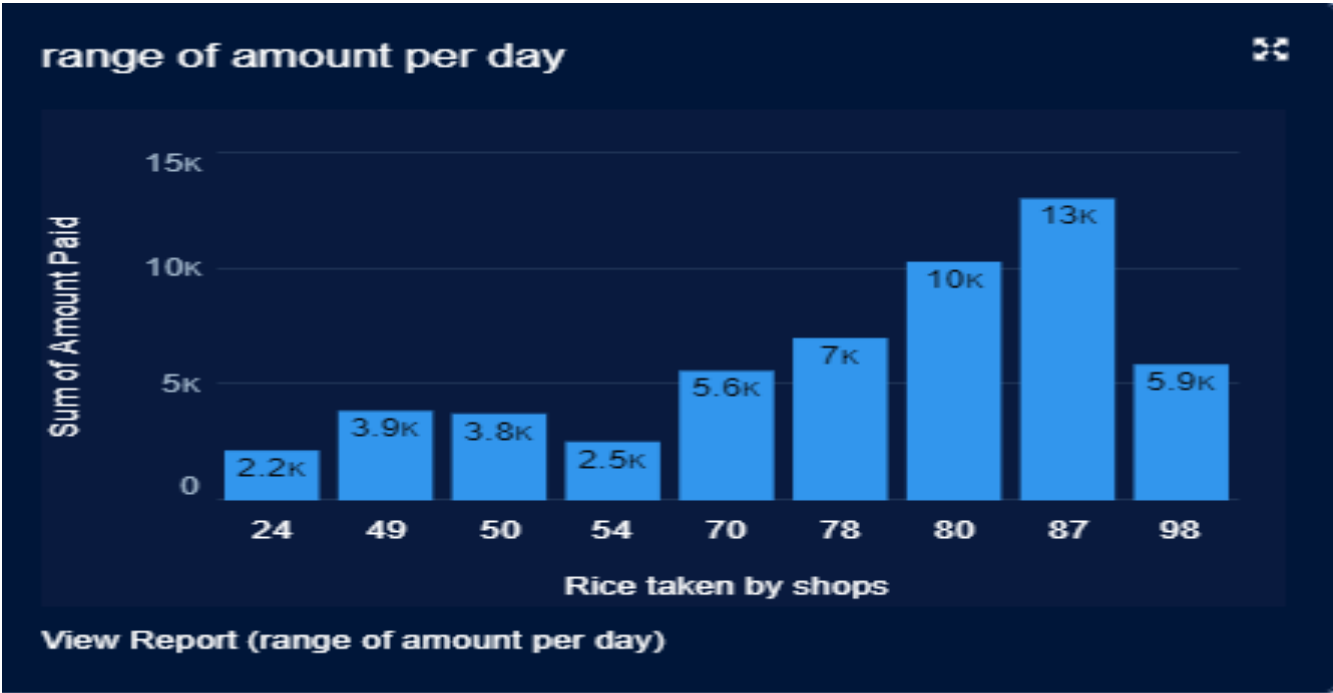
Rice taken by shops

Rice taken by shops	Sum of Amount Paid
24	2.2k
49	3.9k
50	3.9k
54	2.5k
70	5.6k
78	7k
80	10k
87	13k
98	5.9k

View Report (range of amount per day)



Bar Chart



Donut Chart

