

PROJECT REPORT

ON

A CRM APPLICATION FOR

WHOLESALE RICE MILL

BY

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DESCRIPTION

The Rice Mill CRM Application is a comprehensive solution designed to streamline and simplify

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

INTRODUCTION TO SALESFORCE

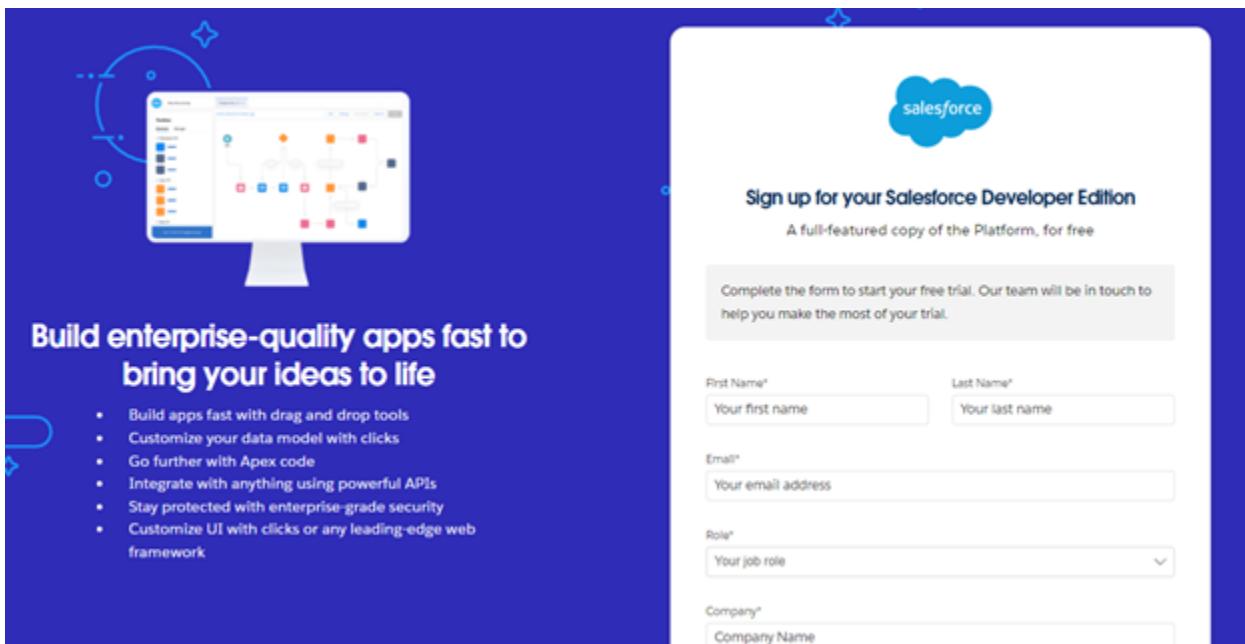
Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

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

Activity 1: Creating Developer Account:

Creating a developer org in salesforce.

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



1. First name & Last name
2. Email
3. Role : Developer

4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

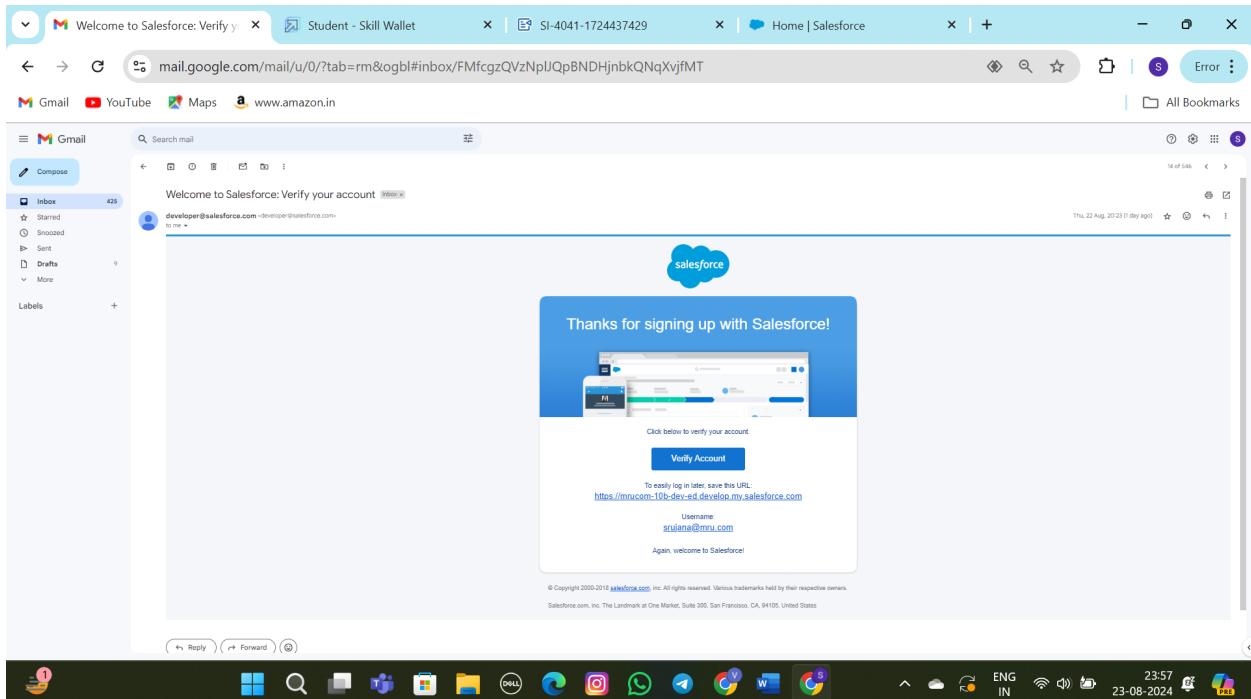
This need not be an actual email id, you can give anything in the format :
username@organization.com

USERNAME : srujana@mru.com

Click on sign me up after filling these.

Activity 2: Account Activation:

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.
2. Click on Verify Account
3. Give a password and answer a security question and click on change password.
4. Then you will redirect to your salesforce setup page.



OBJECT

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

Salesforce objects are of two types:

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

To Navigate to Setup page:

Click on gear icon → click setup.

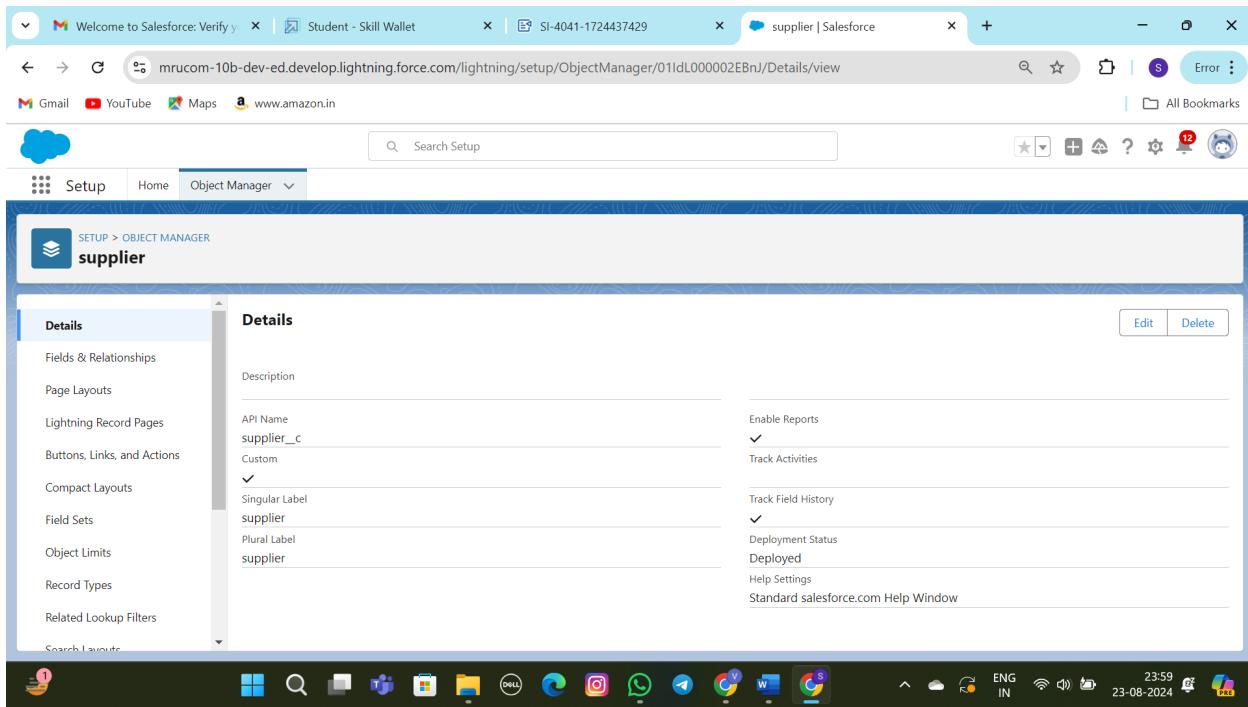
To create an object:

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

Activity 1: Create Supplier Object:

To create an object:

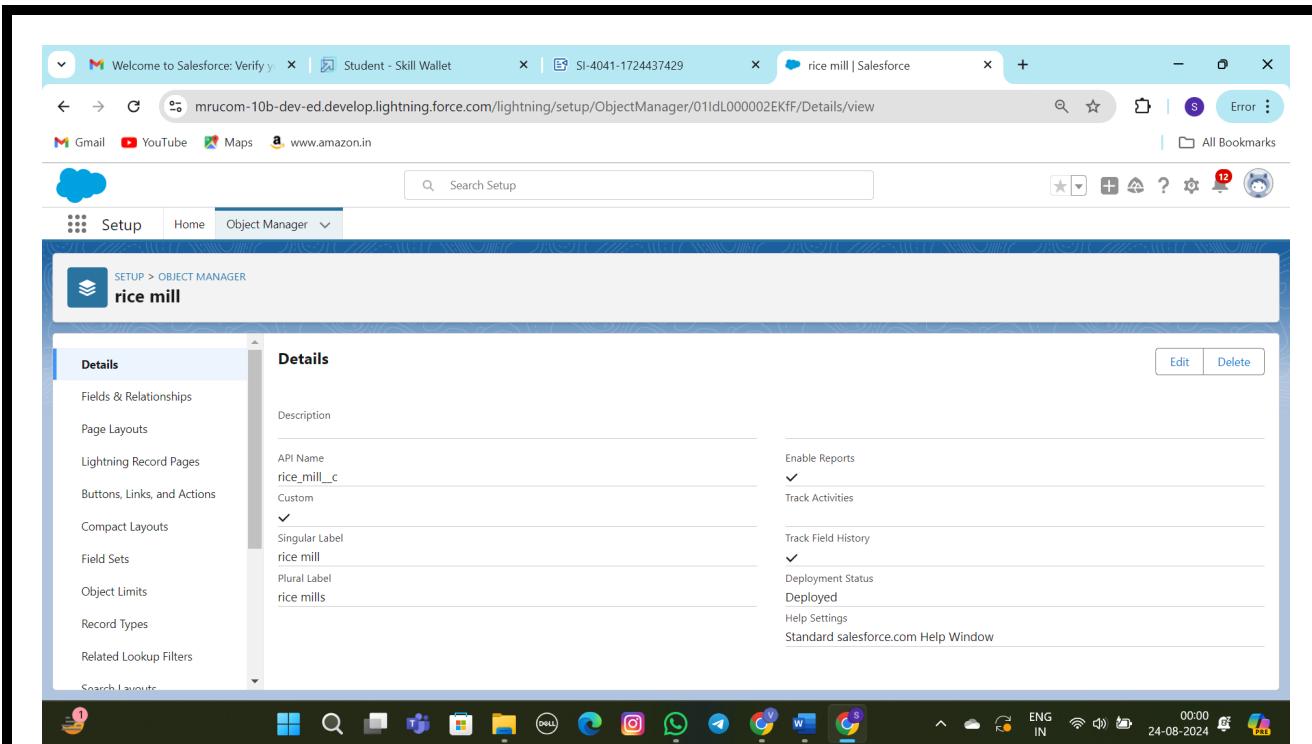
1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
2. Enter the label name → **supplier**
3. Plural label name → supplier
4. Enter Record Name Label and Format
5. Record Name → supplier Name
6. Data Type → Text
7. Click on Allow reports and Track Field History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



Activity 2: Create Rice mill Object:

To create an object:

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



Activity 3: Create consumer Objects:

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

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Welcome to Salesforce: Verify', 'Student - Skill Wallet', 'SI-4041-1724437429', and 'consumer | Salesforce'. Below the navigation bar is a toolbar with icons for Gmail, YouTube, Maps, and Amazon.in. The main content area displays the 'consumer' object details. On the left is a sidebar with options like 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', and 'Related Lookup Filters'. The right side shows the 'Details' section with fields for 'Description', 'API Name' (set to 'consumer__c'), 'Custom' (selected), 'Singular Label' (set to 'consumer'), 'Plural Label' (set to 'consumers'), and other settings like 'Enable Reports' and 'Deployment Status' (set to 'Deployed').

Activity 4: Create rice details Objects:

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

The screenshot shows the Salesforce Object Manager interface, similar to the previous one but for the 'rice details' object. The top navigation bar, toolbar, and sidebar are identical. The main content area displays the 'rice details' object details. The 'Details' section shows the 'API Name' set to 'rice_details__c', 'Custom' selected, 'Singular Label' set to 'rice details', and 'Plural Label' set to 'rice details'. Other settings like 'Enable Reports' and 'Deployment Status' are also present.

TABS

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

Activity 1: Creating a Custom Tab

To create a Tab:(supplier)

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

Activity 2: Creating Remaining Tabs

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

Action	Label	Tab Style	Description
Edit Del	consumers	Box	
Edit Del	rice_details	Box	
Edit Del	rice_mills	Box	
Edit Del	supplier	Box	

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.

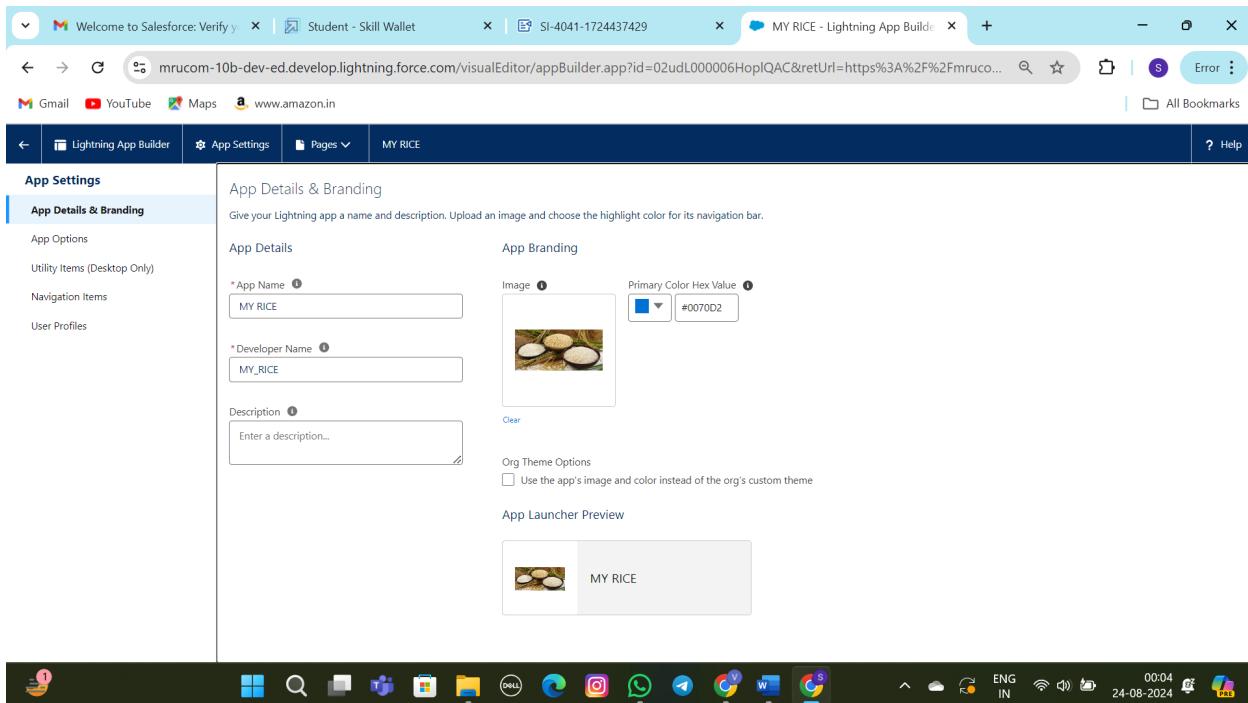
Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more

efficiently by easily switching between apps.

Activity 1: Create a Lightning App

To create a lightning app page:

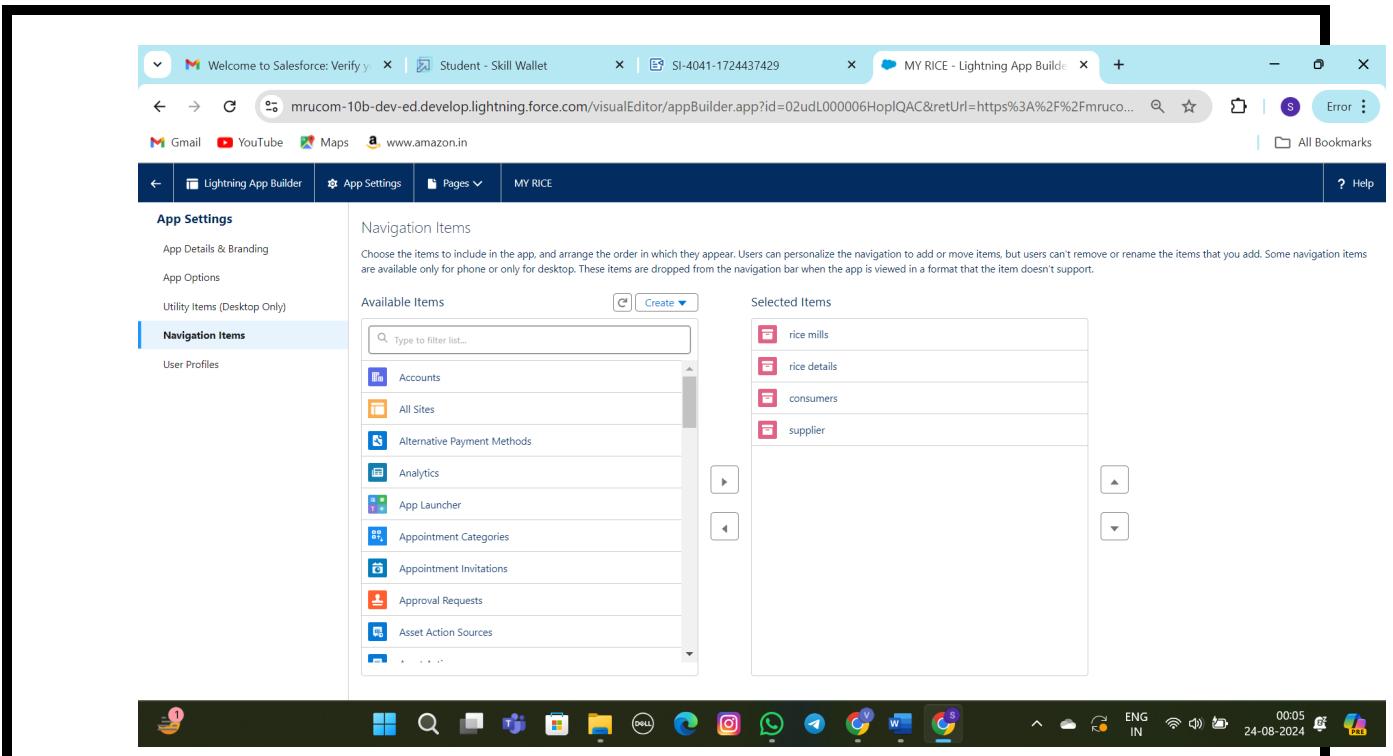
1. Go to setup page → search “app manager” in quick find → select “app manager” → click on New lightning App.
2. Fill the app name in app details as MY RICE → Next → (App option page) keep it as default → Next → (Utility Items) keep it as default → Next.



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

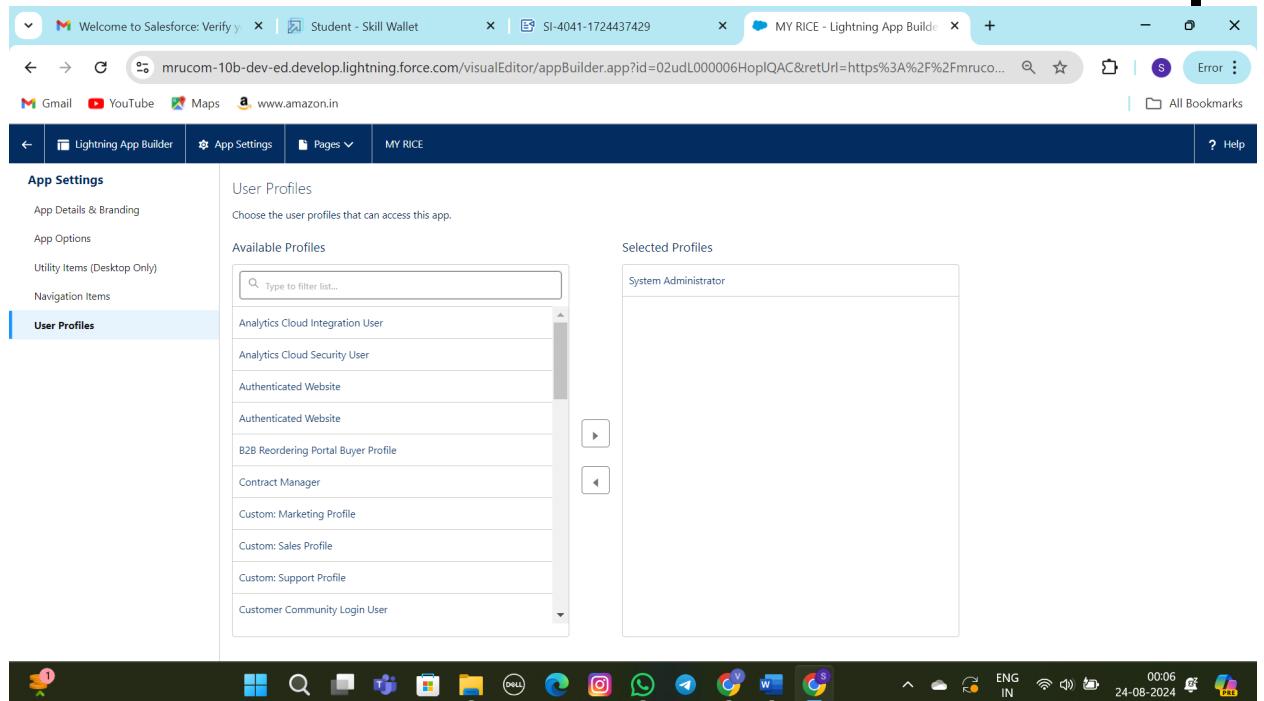
4. To Add Navigation Items:

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



5. To Add User Profiles:

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



FIELDS

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

Activity 1: Creating the number field in rice details object

Creating the number field in rice details object

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

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The main content area displays the 'rice details' object's custom field configuration. The 'rice distributed' field is selected, showing its definition details. The 'Field Information' section lists the field label ('rice distributed'), field name ('rice_distributed'), API name ('rice_distributed_c'), and data type ('Number'). The 'General Options' section includes settings for 'Required' (unchecked), 'Unique' (unchecked), 'External ID' (unchecked), and 'AI Prediction' (unchecked). The bottom of the screen shows the Windows taskbar with various pinned icons and system status indicators.

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.
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.

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named 'supplier Name' is being edited for the 'rice details' object. The 'Fields & Relationships' tab is selected. In the 'Master-Detail Options' section, 'Related To' is set to 'supplier' and 'Child Relationship Name' is set to 'rice_details'. The 'Data Type' is listed as 'Master-Detail'.

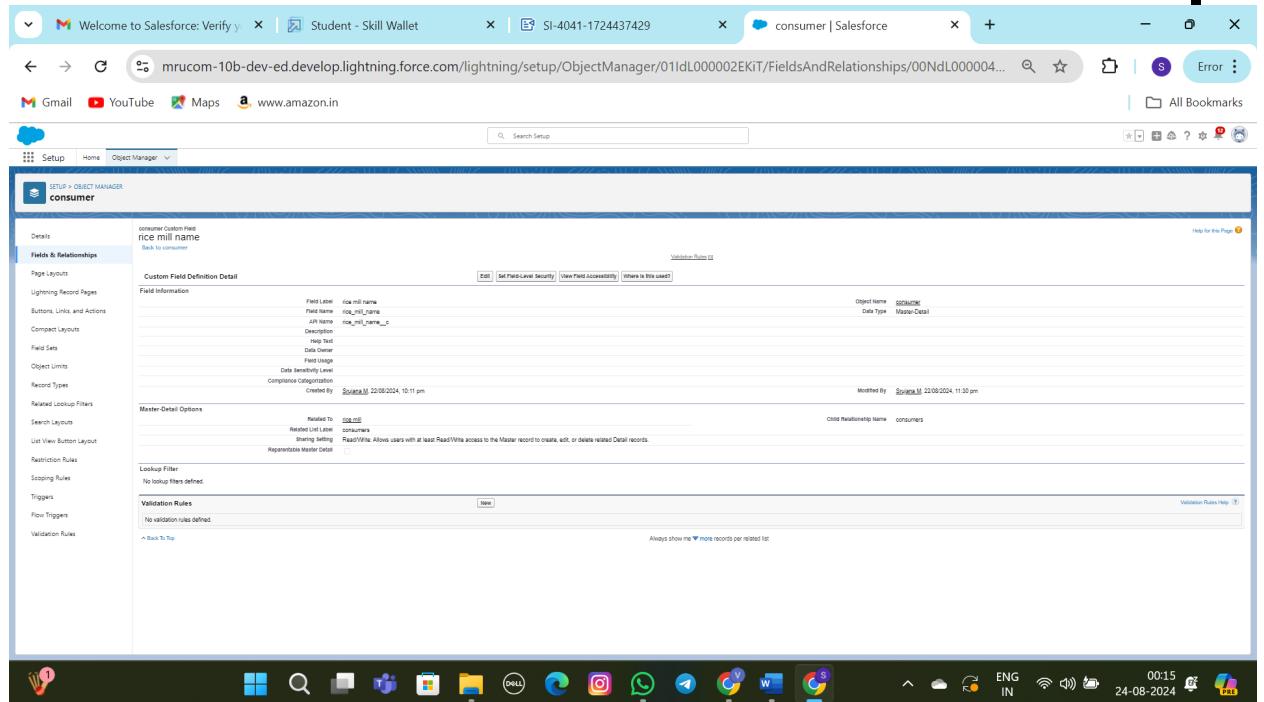
Activity 3 : Creating a Master-Detail Relationship

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.



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.
1. Now click on “Fields & Relationships” → New
2. Select the data type as “Rollup summary”, and click Next.
3. Give the Field label as “sum of rice distributed”, Field Name will be Auto generated, and click Next.
1. Select the summarized object as “rice details”.
2. Select the Rollup type as “sum”.
3. Select the field to aggregate as “rice distributed”, and click Next → Next → Save.

1. Follow the same steps for the rice mill Object from 1 to 3
2. Give the Field label as “rice distributed to shops”, Field Name will be Auto generated, and click Next.
3. Select the summarized object as “rice details”.
4. Select the Rollup type as “sum”.
5. Select the field to aggregate as “rice distributed”, and click Next → Next → Save.
6. Note : create the field as “rice taken by shops in kgs” using number datatype in

consumer object

7. Follow the same steps for the rice mill Object from 1 to 3
 8. Give the Field label as " rice taken ",Field Name will be Auto generated, and click Next.
 9. Select the summarized object as " consumer".
 10. Select the Rollup type as "sum".
 11. Select the field to aggregate as " rice taken in shops ", and click Next → Next → Save.

Welcome to Salesforce: Verify y | Student - Skill Wallet | SI-4041-1724437429 | supplier | Salesforce

Gmail YouTube Maps www.amazon.in

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

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

supplier Custom Field
sum of rice distributed

Back to supplier

Custom Field Definition Detail

Field Information

Field Label	sum of rice distributed
Field Name	sum_of_rice_distributed
API Name	sum_of_rice_distributed_c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	

Created By Sujana M 22/08/2024, 10:17 pm Modified By Sujana M 22/08/2024, 10:17 pm

Object Name supplier

Roll-Up Summary Options

Data Type	Roll-Up Summary
Summarized Object	rice_details
Field to Aggregate	rice_details_rice_distributed
Filter Criteria	

Summary Type SUM

Help for this Page

Windows Taskbar: 00:16, ENG IN, 24-08-2024

Welcome to Salesforce: Verify y | Student - Skill Wallet | SI-4041-1724437429 | supplier | Salesforce

Gmail YouTube Maps www.amazon.in

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

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

supplier Custom Field
rice distributed to shops

Back to supplier

Custom Field Definition Detail

Field Information

Field Label	rice distributed to shops
Field Name	rice_distributed_to_shops
API Name	rice_distributed_to_shops_c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	

Created By Sujana M 22/08/2024, 10:19 pm Modified By Sujana M 22/08/2024, 10:19 pm

Object Name supplier

Roll-Up Summary Options

Data Type	Roll-Up Summary
Summarized Object	rice_details
Field to Aggregate	rice_details_rice_distributed
Filter Criteria	

Summary Type SUM

Help for this Page

Windows Taskbar: 00:17, ENG IN, 24-08-2024

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Welcome to Salesforce: Verify', 'Student - Skill Wallet', 'SI-4041-1724437429', and 'rice mill | Salesforce'. The main page title is 'rice mill Custom Field rice taken'. The left sidebar lists various setup options under 'Fields & Relationships'. The central content area displays the 'Custom Field Definition Detail' for 'rice taken'. Key details shown include:

- Field Information:** Field Label: rice taken, Field Name: rice_taken, API Name: rice_taken__c, Description: Help Text, Data Owner: Field Usage, Data Sensitivity Level: Compliance Categorization.
- Object Name:** rice mill
- Created By:** Srujan.M 22/08/2024, 10:28 pm
- Modified By:** Srujan.M 22/08/2024, 10:28 pm
- Roll-Up Summary Options:** Data Type: Roll-Up Summary, Summarized Object: consumer, Field to Aggregate: consumer.rice_taken_by_shops_in_kgs, Filter Criteria: None, Summary Type: MIN.

Activity 5 : Creating Fields in Objects

Creating the number field in rice details object

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

rice details

Fields & Relationships

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 (one)	rice_mill_c	Master-Detail(rice mill)		✓
supplier Name	supplier_c	Master-Detail(supplier)		✓

Activity 6: Creating Fields in rice mill Objects

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

rice mill

Fields & Relationships

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

Activity 7: Creating Fields in consumer Objects

The screenshot shows the Salesforce Object Manager interface for the 'consumer' object. The left sidebar contains navigation links such as Setup, Home, Object Manager, 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, Scoring Rules, Triggers, Flow Triggers, Validation Rules, and Help. The main content area displays the 'Fields & Relationships' section for the consumer object. It lists 14 items sorted by Field Label. The fields include:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid__c	Formula (Number)		
consumer Name	Name	Auto Number		
Consumer Name	Consumer_Name__c	Formula (Text)		
Created By	CreatedById	Lookup(User)		
email	email__c	Email		
First name	First_name__c	Text(100)		
Last Modified By	LastModifiedById	Lookup(User)		
Last name	Last_name__c	Text(100)		
Mode of payment	Mode_of_payment__c	Picklist		
Phone number	Phone_number__c	Phone		
rice mill name	rice_mill_name__c	Master-Detail(Rice mill)		
Rice taken by shops	Rice_taken_By_Shops__c	Number(5, 0)		
Rice taken by shops in kgs	Rice_Taken_By_Shops_In_Kgs__c	Number(10, 0)		
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.
5. Insert fields formula should be :

`rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c`

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

The screenshot shows the Salesforce setup interface for creating a custom field. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'consumer Custom Field Amount Paid'. It shows the 'Custom Field Definition Detail' page with the following details:

- Field Information:** Field Label: Amount Paid, Field Name: Amount_Paid, API Name: Amount_Paid_c.
- Object Name:** consumer
- Created By:** Srujan_M 22/08/2024, 11:36 pm
- Modified By:** Srujan_M 22/08/2024, 11:36 pm
- Formula Options:** Data Type: Formula, Decimal Places: 2, Formula: Rice_taken_by_shops_c * rice_mill_name_rice_price_kg_c

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

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

The screenshot shows the Salesforce Setup interface. The top navigation bar includes links for Welcome to Salesforce, Student - Skill Wallet, and consumer | Salesforce. The main content area is titled "SETUP > OBJECT MANAGER consumer". On the left, a sidebar lists various setup categories such as 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 "Fields & Relationships" tab is currently selected. In the center, the "Custom Field Definition Detail" for the "Consumer Name" field is displayed. The field information includes: Field Label: Consumer Name, Field Name: Consumer_Name, API Name: Consumer_Name__c, Description: (empty), Help Text: (empty), Data Owner: (empty), Field Usage: (empty), Data Sensitivity Level: (empty), Compliance Categorization: (empty). The formula is defined as "First_name__c +' + Last_name__c". The right side of the screen shows the "Object Name" as "consumer" and the "Created By" and "Modified By" fields both show "Srujan_M" with the timestamp "22/08/2024, 11:39 pm". The bottom of the screen shows the Windows taskbar with various pinned icons and system status indicators.

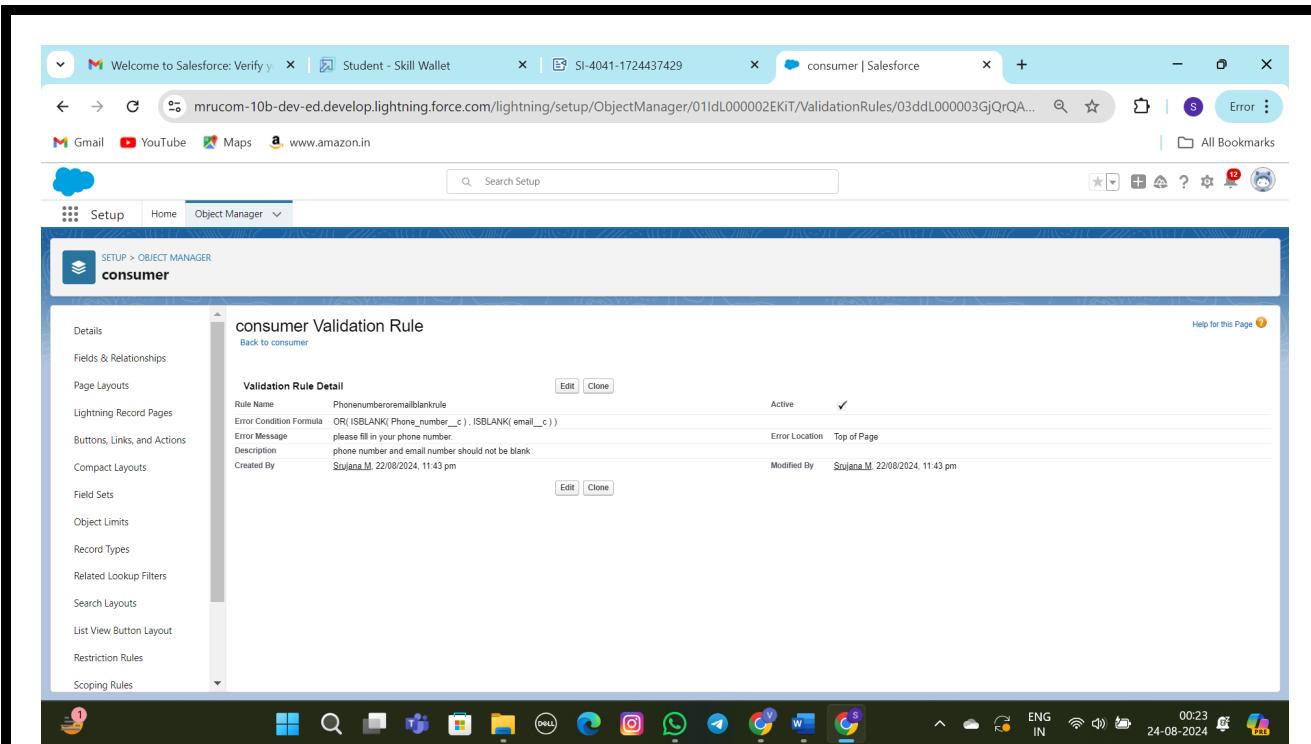
Activity 9 : Creating the validation rule

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

Creating the validation rule for phone number field in consumer object

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

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



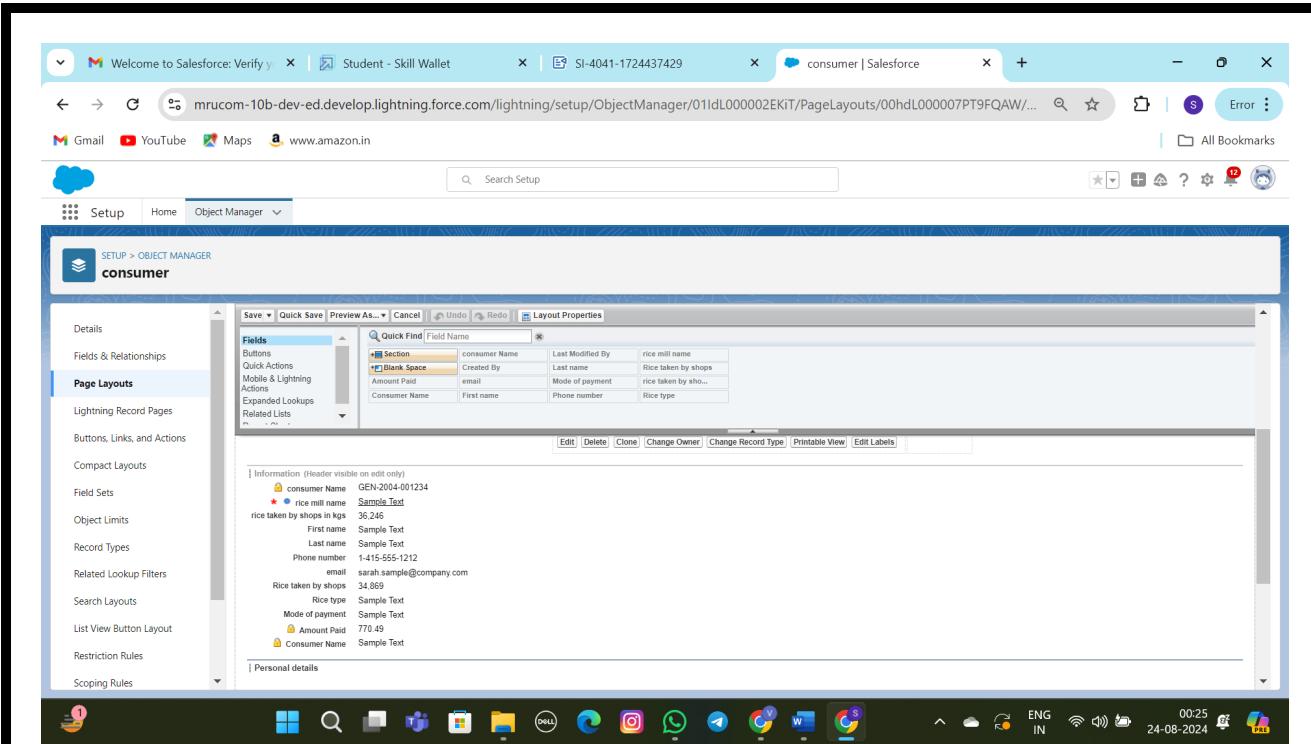
PAGE LAYOUTS

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

Activity 1 : creating the page layout

To Create a Page layout:

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



PROFILES

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

Activity 1: owner Profile

To create a new profile:

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

The screenshot shows the Salesforce Setup interface with the following details:

- Address Bar:** mrucom-10b-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edL000006DCaz
- Search Bar:** Search Setup
- Header:** Welcome to Salesforce: Verify your account | Student - Skill Wallet | SI-4041-1724437429 | Profiles | Salesforce
- Left Sidebar:** Setup, Home, Object Manager, Search for profile.
- Profile Detail:** Profile owner, User License: Salesforce, Description: Created By Sujana M, 23/08/2024, 12:05 am, Modified By Sujana M, 23/08/2024, 12:09 am.
- Page Layouts:** Standard Object Layouts for Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Location Group Assignment Layout, Macro, Object Milestone, Operating Hours, Opportunity, Opportunity Product.

Activity 2: employer Profile

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

The screenshot shows the Salesforce Lightning setup interface. The top navigation bar includes tabs for 'Welcome to Salesforce: Verify', 'Student - Skill Wallet', 'SI-4041-1724437429', and 'Profiles | Salesforce'. The main content area is titled 'SETUP Profiles' and shows a profile named 'employer'. The profile details include:

- Name: employer
- User License: Salesforce Platform
- Description: (empty)
- Created By: Srujan M, 23/08/2024, 12:10 am
- Modified By: Srujan M, 23/08/2024, 12:15 am

The 'Profile Detail' section has buttons for 'Edit', 'Clone', 'Delete', and 'View Users'. Below this, the 'Page Layouts' section lists standard object layouts for various objects like Global, Lead, Location, Location Group, etc.

At the bottom of the page, there are links for 'Help for this Page' and 'Feedback'.

Activity 3: worker Profile

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

The screenshot shows the Salesforce Lightning setup interface. The URL in the address bar is <https://mrucm-10b-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edL000006DDQb>. The page title is "Profiles | Salesforce". The main content area is titled "SETUP Profiles" and shows a profile named "worker". The "Profile Detail" section includes fields for Name (worker), User License (Salesforce Platform), Description, Created By (Sujana M), and Modified By (Sujana M). Below this, the "Page Layouts" section lists various standard object layouts for different objects like Global, Lead, Location, Location Group, and Object Milestone. The bottom of the screen shows the Windows taskbar with icons for various applications.

ROLE & ROLE HIERARCHY

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

Activity 1: Creating owner Role

Creating owner Role:

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

Activity 2: Creating employer roles

Creating another two roles under manager

1. Go to quick find → Search for Roles → click on set up roles.
2. Click plus on CEO role, and click add role under owner.
3. Give Label as “employer” and Role name gets auto populated. Then click on Save.
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 Roles setup page. The URL in the address bar is mrucm-10b-dev-ed.lightning.force.com/lightning/setup/Roles/home. The page title is "Roles | Salesforce". The left sidebar has a "Users" section expanded, with "Roles" selected. The main content area is titled "Creating the Role Hierarchy" and shows a tree view of roles under "Your Organization's Role Hierarchy". The hierarchy includes the following roles:

- Malla Reddy University
 - CEO
 - CFO
 - COO
 - owner
 - employer
 - worker
 - SVP, Customer Service & Support
 - SVP, Human Resources
 - SVP, Sales & Marketing

A message at the bottom left says " Didn't find what you're looking for? Try using Global Search." The bottom right corner shows the system status: 00:30, ENG IN, 24-08-2024, and a battery icon.

USERS

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

Activity 1: Create User

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

Save it.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A user named 'vicky y' is being edited. The 'User Detail' section shows the following fields:

Field	Value
Name	vicky y
Alias	v y
Email	vicky@gmail.com [Verify]
Username	vicky12@gmail.text
Nickname	vick
Title	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	
Manager	
Receive Approval Request Emails	Only if I am an approver
Federation ID	
Role	owner
Profile	Salesforce owner
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	<input type="checkbox"/> View
Data.com User Type	<input type="checkbox"/> I
Accessibility Mode (Classic Only)	<input type="checkbox"/> I
Debug Mode	<input type="checkbox"/> I
High-Contrast Palette on Charts	<input type="checkbox"/> I

Activity 2: creating another users

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

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

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A new user record is being created with the following details:

- User Detail:**
 - Name: ram ram
 - Alias: rram
 - Email: ram@gmail.com [Verify]
 - Username: ram@gmail.rams
 - Nickname: rams
 - Title:
 - Company:
 - Department:
 - Division:
 - Address:
 - Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
 - Locale: English (India)
 - Language: English
 - Delegated Approver:
 - Manager:
 - Receive Approval Request Emails: Only if I am an approver
 - Federation ID:
- Role:** employer
- User License:** Salesforce Platform
- Profile:** Standard Platform User
- Active:** checked
- Other Options:** 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, High-Contrast Palette on Charts

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

2. Fill in the fields

First Name : ragu

Last Name : raj

Alias : Give a Alias Name

Email id : Give your Personal Email id

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

Nick Name : Give a Nickname

Role : worker

User license : Salesforce platform

Profiles : standard platform user.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, a sidebar lists categories like Permission Set Groups, Profiles, Public Groups, Roles, and User Management Settings. The 'Users' category is expanded, showing sub-options: Feature Settings, Data.com, and Prospectors. A search bar at the top right contains the text 'Search Setup'. The main content area is titled 'User' and shows a record for 'ragu raj'. The 'User Detail' section includes fields for Name (ragu raj), Alias (raj), Email (raj@gmail.com [Verify]), Username (raj@gmail.ragu), Nickname (rajrag), Title, Company, Department, Division, Address, Time Zone (GMT+05:30 India Standard Time (Asia/Kolkata)), Locale (English (India)), Language (English), Delegated Approver, Manager, and Receive Approval Request Emails (Only if I am an approver). To the right of these fields is a large list of checkboxes for various user roles and features, such as Marketing User, Active, Site.com Contributor User, etc. The 'worker' role is checked. The bottom of the page shows a footer with system status icons and the date 24-08-2024.

PERMISSION SETS

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

Activity 1: Creating OWD setting.

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

The screenshot shows the Salesforce Sharing Settings page. At the top, there are tabs for 'Welcome to Salesforce: Verify' and 'Student - Skill Wallet'. The main content area is titled 'Sharing Settings' under the 'SETUP' tab. It displays the 'Sharing Settings' page with a table of default sharing settings for various objects like Lead, Account, Contact, etc. The table includes columns for 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. A note at the bottom says 'This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculations.' Below the table, there are buttons for 'Manage sharing settings for:' (All Objects) and 'Disable External Sharing Model'.

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

The screenshot shows the Salesforce consumer list page. The URL in the address bar is 'mrucm-10b-dev-ed.lightning.force.com/lightning/o/consumer_c/list?filterName=_Recent'. The page title is 'Recently Viewed | consumers'. The left navigation bar shows 'MY RICE', 'rice mills', 'rice details', 'consumers' (which is selected), and 'supplier'. The main content area lists '10 items · Updated a few seconds ago' with a table of consumer records. Each record has a checkbox next to it and a link to 'consumer Name'. The table includes columns for 'consumer Name' and other fields. The bottom right corner of the page shows a toolbar with icons for 'New', 'Import', and 'Assign Label'.

REPORTS

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

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

Activity 1: Create Report

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

Total Records	Total Amount Paid
10	8,300.00

Rice type	rice price/kg	Mode of payment	rice mill	consumer Name	Amount Paid	
10sooper (4)	90 (2)	Net banking (1)	rice-001	consumer-003	250.00	
		Subtotal			250.00	
		Cash (2)	rice-001	consumer-001	100.00	
			rice-001	consumer-007	100.00	
		Subtotal			200.00	
		200 (1)	UPI (1)	rice-002	200.00	
					200.00	
		Subtotal			200.00	
		Subtotal			650.00	
□ Normal rice (6)	50 (2)	Net banking (1)	rice-001	consumer-008	300.00	
		Subtotal			300.00	
		UPI (1)	rice-001	consumer-002	150.00	
			rice-001	consumer-002	150.00	
		Subtotal			450.00	
		200 (4)	Credit card (1)	rice-002	consumer-004	1,800.00
				rice-002	consumer-004	1,800.00
		Subtotal			3,600.00	
		Debit card (2)	rice-002	consumer-005	600.00	
			rice-002	consumer-009	200.00	
		Subtotal			800.00	
		Net banking (1)	rice-002	consumer-010	4,000.00	
					4,000.00	
		Subtotal			4,000.00	
		Subtotal			7,200.00	
		Total (10)			7,850.00	
		Total (10)			8,300.00	

Activity 2: Sharing report to owner

1. Click edit drop down and select subscribe option
2. After selecting the run report as a “another person” select your personal account or

whom you want to send that mail to.

3. Click save.

The screenshot shows a Salesforce Lightning page with a report titled "Report: rice mills with consumers range of amount per day". The report details various rice purchases, including basmati and normal rice, with their respective quantities and payment methods. A modal window titled "Edit Subscription" is open, allowing the user to set a daily email notification at 8:00 am. The "Run Report As" section is set to "Me". The "Conditions" section is optional and currently empty. At the bottom right of the modal are "Cancel" and "Save" buttons.

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

Activity 3: create a report folder

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

1.navigate to app launcher and click reports on that.

2.click all reports.

3. Select the range of amount per day drop down in that click move.

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

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

The screenshot shows the Salesforce Reports home page. At the top, there are three tabs: "Welcome to Salesforce: Verify" (closed), "Student - Skill Wallet" (closed), and "SI-4041-1724437429" (closed). Below the tabs, the URL is mrucom-10b-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=userFolders. The browser toolbar includes links to Gmail, YouTube, Maps, and www.amazon.in, along with a search bar and bookmark icons.

The main content area displays a table of reports and folders. The left sidebar shows categories like "Reports", "Recent", "Created by Me", "Private Reports", "Public Reports", "All Reports", "Folders", and "All Folders". The "All Folders" section is currently selected. The table has columns for Name, Created By, Created On, Last Modified By, and Last Modified Date. A context menu is open for the last row, showing options: "Favorite" (which is checked), "Share", "Rename", and "Delete".

	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	Einstein Bot Reports	Automated Process	22/8/2024, 7:48 pm	Automated Process	22/8/2024, 7:48 pm
Created by Me	Einstein Bot Reports Spring '23	Automated Process	22/8/2024, 7:48 pm	Automated Process	22/8/2024, 7:48 pm
Private Reports	Einstein Bot Reports Summer '23	Automated Process	22/8/2024, 7:48 pm	Automated Process	22/8/2024, 7:48 pm
Public Reports	Einstein Bot Reports Summer '22	Automated Process	22/8/2024, 7:48 pm	Automated Process	22/8/2024, 7:48 pm
All Reports	Einstein Bot Reports Winter '23	Automated Process	22/8/2024, 7:48 pm	Automated Process	22/8/2024, 7:48 pm
	Enablement Dashboard Reports Spring '24	Automated Process	22/8/2024, 7:48 pm	Automated Process	22/8/2024, 7:48 pm
	Enablement Dashboard Reports Summer '24	Automated Process	22/8/2024, 7:48 pm	Automated Process	22/8/2024, 7:48 pm
FOLDERS	estimated rice per day	Srujana M	23/8/2024, 1:13 am	Srujana M	23/8/2024, 1:13 am

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.

The screenshot shows the Salesforce Lightning interface. At the top, there are three tabs: 'Welcome to Salesforce: Verify' (active), 'Student - Skill Wallet', and 'Dashboards | Salesforce'. Below the tabs is a browser-style address bar with the URL 'mrucm-10b-dev-ed.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru'. The main content area is titled 'Dashboards' and shows a table of recent dashboards. The table has columns: Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. One entry is visible: 'estimated data' (Description: total amount of data in dashboards, Folder: amount data, Created By: Srujan M, Created On: 23/8/2024, 1:22 am). To the left of the table, there's a sidebar with sections for Dashboards (Recent, Created by Me, Private Dashboards, All Dashboards), Folders (All Folders, Created by Me, Shared with Me), and Favorites (All Favorites). The bottom of the screen features a dark taskbar with various application icons.

Activity 2: Create Dashboard

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

Display as- vertical bar chart

X-axis - rice taken by shops

Y-axis- sum of amount

Y-axis range - automatic

Sort by - rice taken by shops

Component theme - dark.

Add the component

Again select add component with above same steps

- 1.display as donut chart
 - 2.sort by - sum of amount
 - 3.title-range of amount per day
 - 4.component theme dark
- Click add.
Click save and done.

Welcome to Salesforce: Verify your account | Student - Skill Wallet | SI-4041-1724437429 | estimated data | Salesforce

mrucm-10b-dev-ed.lightning.force.com/lightning/r/Dashboard/01ZdL000001yFV3UAM/view?queryScope=userFolders

Gmail YouTube Maps www.amazon.in

Search... Refresh Edit Subscribe

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

Dashboard **estimated data**
total amount of data in dashboards
As of 23-Aug-2024, 1:27 am Viewing as Srujan M

range of amount per day

Rice type

Sum of Amount Paid

Rice type	Sum of Amount Paid
1.basmati	650
2.normal rice	7,650

View Report (range of amount per day)

range of amount per day

Rice type

Sum of Amount Paid

Rice type	Sum of Amount Paid
1.basmati	650 (0.8%)
2.normal rice	7,7k (99.17%)

View Report (range of amount per day)

00:38 24-08-2024 ENG IN WiFi Battery 24-08-2024 00:38 ENG IN WiFi Battery

The screenshot shows a Salesforce Lightning dashboard titled "estimated data". The dashboard has a dark blue background and features two main visualizations. On the left, there is a bar chart titled "range of amount per day" showing the sum of amount paid for two rice types: 1.basmati (650) and 2.normal rice (7,650). On the right, there is a donut chart titled "range of amount per day" showing the distribution of the total amount paid between basmati and normal rice. The donut chart indicates that 650 (0.8%) is for basmati and 7,7k (99.17%) is for normal rice. The dashboard also includes a header with navigation links like "MY RICE", "rice mills", "rice details", "consumers", "supplier", "range of amount per day", and "estimated data". The bottom of the screen shows a taskbar with various icons and system status indicators.