

Trusha Jayesh Vithlani - Developer Track

## **Project Report**

### **A CRM APPLICATION FOR WHOLESALE RICE MILL**

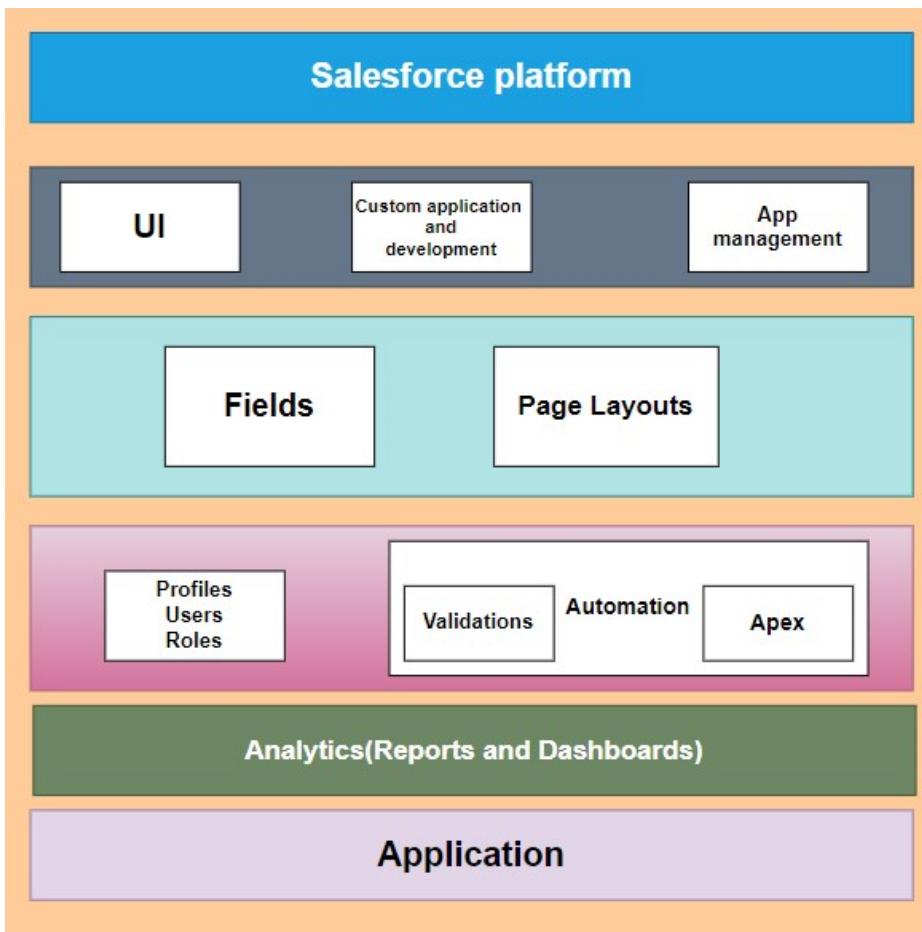
#### **Short Description:**

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

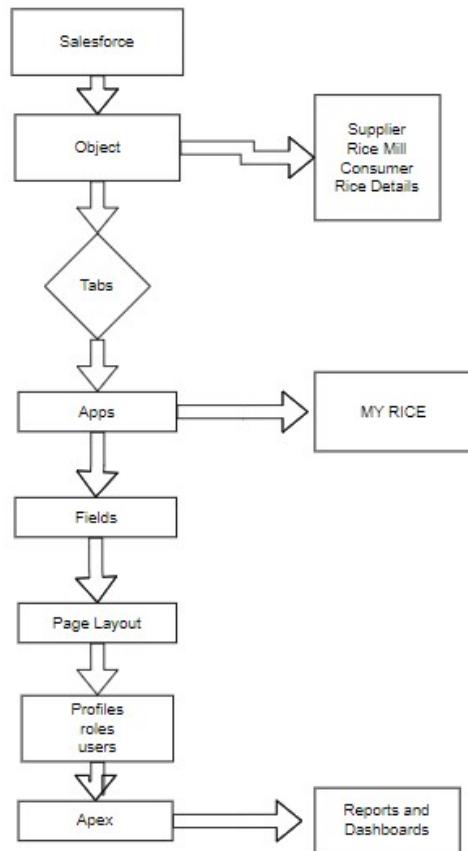
#### **Long Description:**

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.

## Technical Architecture:



## Project Flow:



## **Features and Functionality:**

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

**Roll Up Summary Field:** This 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.

**Cross Object Formula:** It is a formula field that references fields from another object in Salesforce. This type of formula allows users to calculate the total amount from number of rice taken\*price/kg and it displays the total amount I have to pay.

**Validation Rule:** 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.so , In this project i gave Isblank formula.Isblank formula is used to verify whether it is blank it shows error.

**Permission sets::** Organization Wide Defaults(OWD) in salesforce is the baseline level of access that the most restricted user should have. Organizational Wide Defaults are used to restrict access.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.

## **Pre-requisites :**

- Salesforce Developer account
- Knowledge of the salesforce admin concepts.
- Installed with 2 web browsers in the Machine
- Good internet connectivity.

## **What you'll learn**

1. Real Time Salesforce Project
2. Object & Relationship in Salesforce
3. Formula fields and Validation rules.
4. Cross object formula fields.
5. Page layouts.
6. Rollup summary fields.
7. Reports and dashboards

## **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.

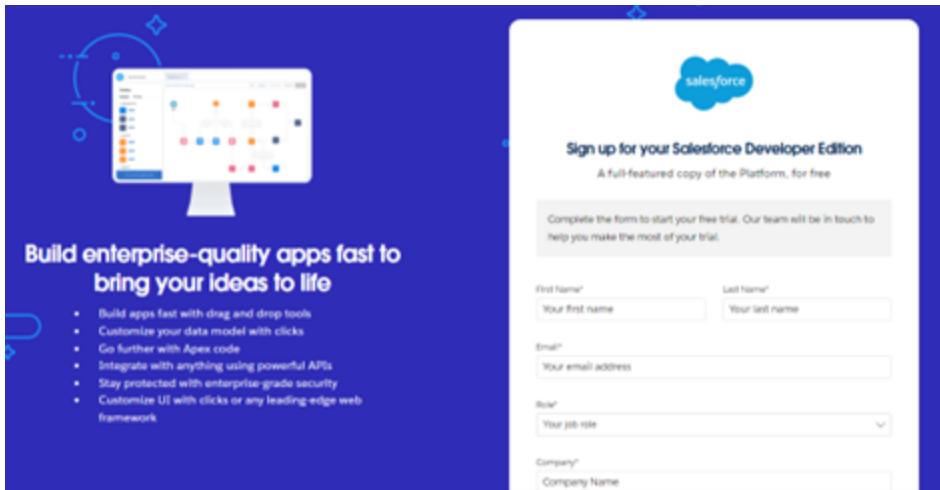
So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<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 :



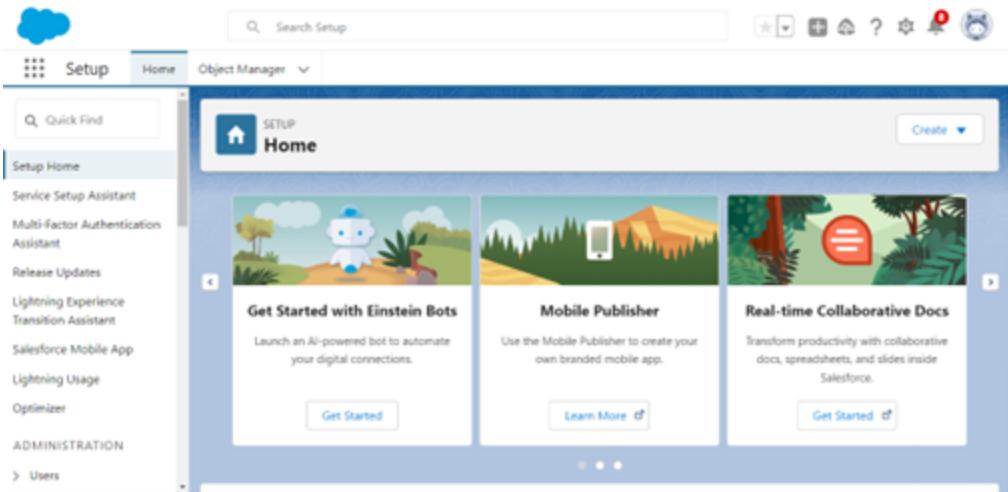
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

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

### **Salesforce objects are of two types:**

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

## To Navigate to Setup page:

Click on gear icon → click setup.

## To create an object:

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

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup' and 'Object Manager'. Below it is the 'Object Manager' page, which lists '51+ Items, Sorted by Label'. The page has columns for 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', and 'LAST MC'. A 'Create' button is located at the top right of the list area. A red arrow points from the 'Object Manager' button in the top navigation bar to the 'Create' button in the top right of the Object Manager interface. Another red oval highlights the 'Custom Object' button in the top right of the Object Manager interface.

- On Custom object defining page:

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

The screenshot shows the 'New Custom Object' setup page. It has sections for 'Custom Object Information' (Label, Plural Label, Starts with vowel sound), 'Object Name' (Object Name, Description), 'Context-sensitive help setting' (Open the standard Salesforce.com Help & Training window, Open a window using a Visualforce page), 'Record Name Label and Format' (Record Name, Data Type: Text), and 'Optional Features' (Allow Reports, Allow Activities, Track Field History). A red circle highlights the 'Allow Reports' checkbox in the 'Optional Features' section. Red arrows point to the 'Label' field and the 'Object Name' field, both of which are highlighted with red boxes.



4. Click on Save.

### Activity 1: Create Supplier Object:

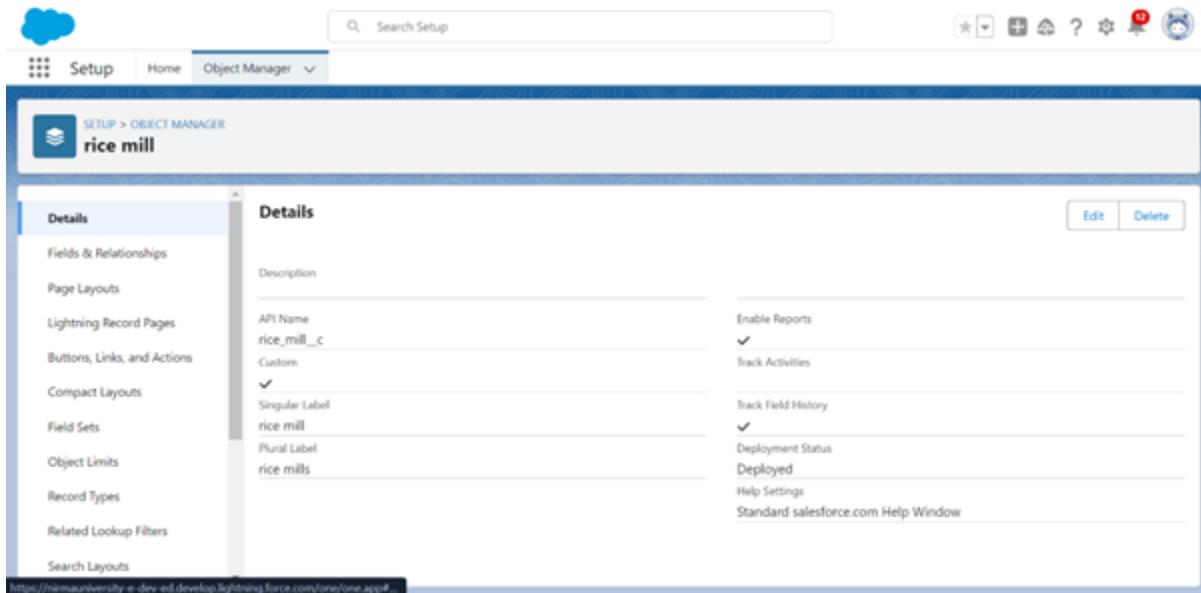
To create an object:

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}
8. Starting number → 1
9. Click on Allow reports and Track Field History, Allow Search.
10. 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**
2. label name → **consumer**
3. Plural label name → **consumers**
4. Display Format → **consumers**-{000}
5. Starting number → 1

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main panel displays the 'Details' for the 'consumer' object. The 'API Name' is set to 'consumer\_\_c'. The 'Singular Label' is 'consumer' and the 'Plural Label' is 'consumers'. Under the 'Details' section, there are checkboxes for 'Enable Reports' (checked), 'Track Activities' (unchecked), 'Track Field History' (checked), and 'Deployment Status' (set to 'Deployed'). The 'Help Settings' link points to 'Standard salesforce.com Help Window'. At the top right, there are 'Edit' and 'Delete' buttons.

#### Activity 4: Create rice details Objects:

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main panel displays the 'Details' for the 'rice details' object. The 'API Name' is set to 'rice\_details\_\_c'. The 'Singular Label' is 'rice details' and the 'Plural Label' is 'rice details'. Under the 'Details' section, there are checkboxes for 'Enable Reports' (checked), 'Track Activities' (unchecked), 'Track Field History' (checked), and 'Deployment Status' (set to 'Deployed'). The 'Help Settings' link points to 'Standard salesforce.com Help Window'. At the top right, there are 'Edit' and 'Delete' buttons.

## **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 inthe objects.

Types of Tabs:

### **1. Custom Tabs**

Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

### **2. Web Tabs**

Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.

#### **1. Visualforce Tabs**

Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

#### **2. Lightning Component Tabs**

Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

#### **3. Lightning Page Tabs**

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

## 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.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The main content area is titled 'Custom Tabs' and contains a brief description of what custom tabs are and how they differ from standard tabs. Below this is a table titled 'Custom Object Tabs' which lists four tabs: 'Building', 'Computer', 'Factory', and 'Supplier'. The 'Supplier' tab is highlighted with a yellow background. A separate section below is titled 'Web Tabs' with the message 'No Web Tabs have been defined'.

Action	Label	Tab Style	Description
Edit   Del	consumers	Building	
Edit   Del	rice_details	Computer	
Edit   Del	rice_mills	Factory	
Edit   Del	supplier	Supplier	

This screenshot shows the 'Edit Custom Object Tab' page for the 'Supplier' tab. The top navigation bar says 'SETUP Tabs'. The main title is 'Edit Custom Object Tab' with 'suppliers' in parentheses. It says 'Fill in the fields below to define the custom tab.' Below this is a 'Custom Object Tab Information' section with fields for 'Tab Label' (set to 'suppliers'), 'Object' (set to 'supplier'), and 'Tab Style' (set to 'Box'). There is also a note about choosing a 'Splash Page Custom Link'. At the bottom, there is a 'Description' field with a placeholder 'Enter a short description.', a 'Save' button, and a 'Cancel' button.



## 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 .

## Milestone 4- The Lightning App:

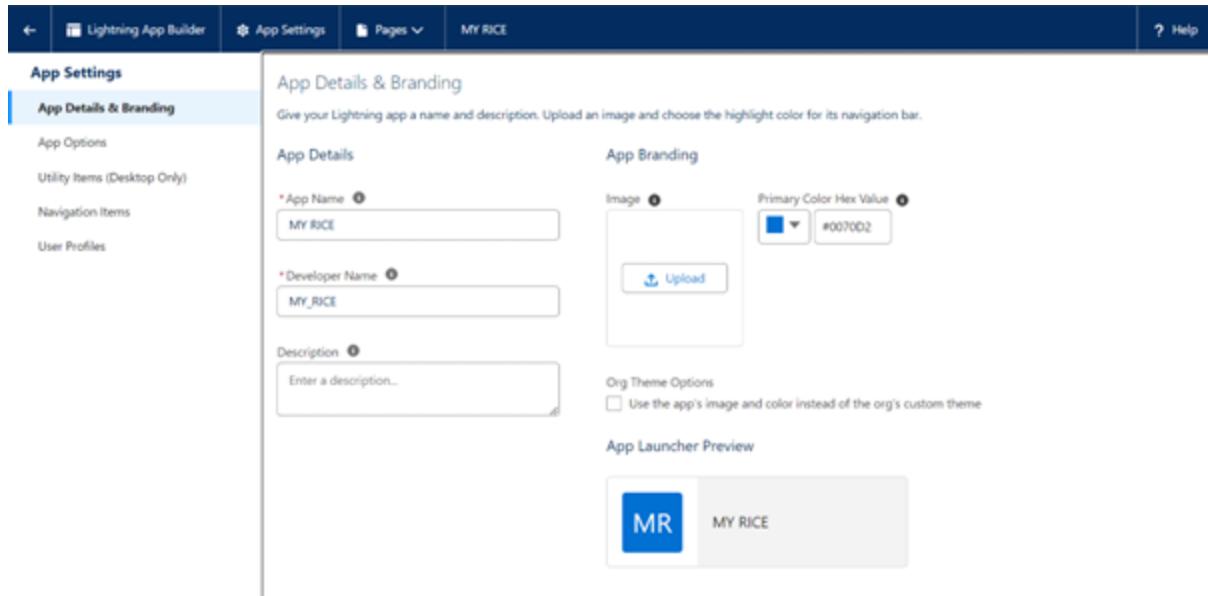
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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.
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.

## 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

### Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

- Created By
- Owner
- Last Modified
- Field Made During object Creation

## **Custom Fields:**

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

## **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.
2. Click on fields & relationship → click on New.
3. Select Data type as “Number” and click Next.
4. Given the Field Label as “rice distributed” and length as “5”.
5. Field Name will be auto populated, and click on 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_Name_c	Master-Detail(supplier)		✓

## **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 Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main area is titled 'SETUP > OBJECT MANAGER consumer'. On the left, a sidebar lists various configuration options like Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, etc. The main content area is titled 'Fields & Relationships' and shows a table with four items. The table columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
consumer Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
rice mill name	rice_mill_name_c	Master-Detail(rice mill)		✓

### 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.
2. Now click on “Fields & Relationships” → New
3. Select the data type as “Rollup summary ”,and click Next.
4. Give the Field label as “ sum of rice distributed ”,Field Name will be Auto generated, and click Next.
5. Select the summarized object as “ rice details ”.
6. Select the Rollup type as “sum”.
7. Select the field to aggregate as “ rice distributed ”, and click Next → Next → Save.
8. Follow the same steps for the rice mill Object from 1 to 3
9. Give the Field label as “ rice distributed to shops ”,Field Name will be Auto generated, and click Next.
10. Select the summarized object as “ rice details ”.
11. Select the Rollup type as “sum”.
12. Select the field to aggregate as “ rice distributed ”, and click Next → Next → Save.
13. **Note :** create the field as “ rice taken by shops in kgs” using number datatype in consumer object
14. Follow the same steps for the rice mill Object from 1 to 3
15. Give the Field label as “ rice taken ”,Field Name will be Auto generated, and click Next.
16. Select the summarized object as “ consumer”.
17. Select the Rollup type as “sum”.
18. Select the field to aggregate as “ rice taken in shops ”, and click Next → Next → Save.

## **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.

## **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 ”

## Activity 7: Creating Fields in Consumer Objects

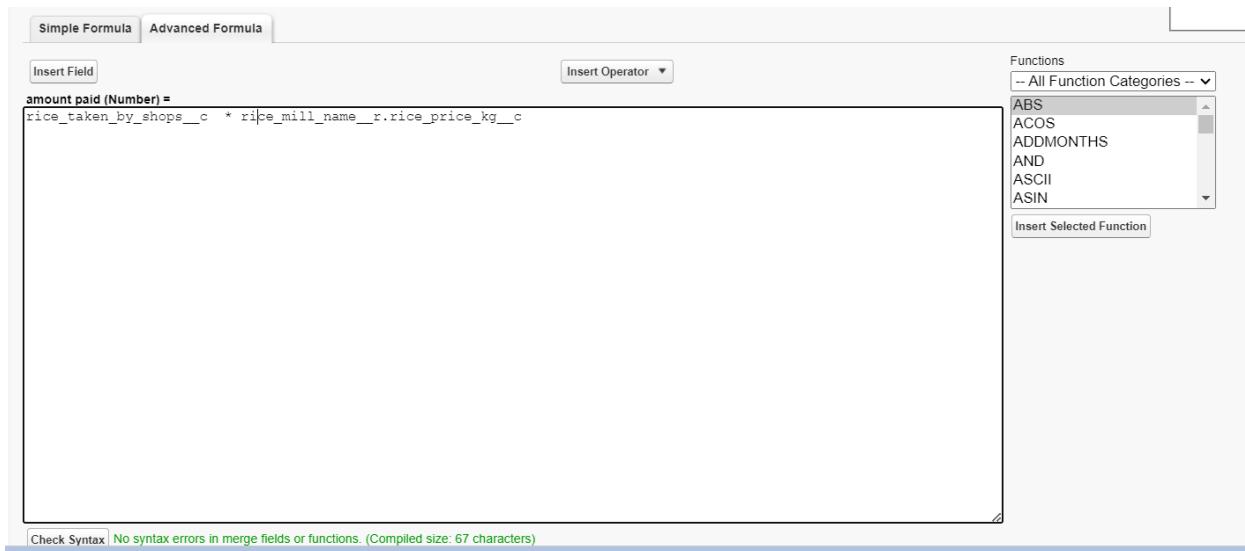
S.no	Object name	Fields	data type														
1.	consumer	<table border="1"> <tr> <td>First name</td><td>Text</td></tr> <tr> <td>Last name</td><td>Text</td></tr> <tr> <td>Phone number</td><td>phone</td></tr> <tr> <td>email</td><td>email</td></tr> <tr> <td>Rice taken by shops</td><td>Number (length=5)</td></tr> <tr> <td>Rice type</td><td>(Picklist values) 1.basmati 2.sella 3.parboiled</td></tr> <tr> <td>Mode of payment</td><td>Picklist values 1. Credit card 2. Debit card 3. Net banking 4. UPI 5. 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.sella 3.parboiled	Mode of payment	Picklist values 1. Credit card 2. Debit card 3. Net banking 4. UPI 5. 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.sella 3.parboiled																
Mode of payment	Picklist values 1. Credit card 2. Debit card 3. Net banking 4. UPI 5. Cash																

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



### 1. Creating the Formula field in consumer Object

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

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

The screenshot shows the Salesforce Formula Editor interface. At the top, there are tabs for "Simple Formula" and "Advanced Formula", with "Simple Formula" selected. Below the tabs are buttons for "Insert Field", "Insert Operator", and a dropdown menu for "Functions". A scrollable list of functions is visible on the right, including ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, and others. In the main editing area, the formula `customer name (Text) =  
First_Name__c + ' ' + Last_Name__c` is entered. At the bottom left, there is a "Check Syntax" button and a status message: "No syntax errors in merge fields or functions. (Compiled size: 35 characters)".

8.

## 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.

The screenshot shows the Salesforce Object Manager interface for the 'consumer' object. On the left, there's a sidebar with various tabs like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Validation Rules' and shows one item: 'phonenumeroremailblankrule'. The table columns are RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, and MODIFIED BY. The row contains 'phonenumeroremailblankrule', 'Top of Page', 'please fill phone number', a dropdown arrow, and 'udayrishi yelagandula, 05/07/2023, 12:57 pm'. A 'New' button is visible at the top right of the table.

3. Enter the Rule name as “Phonenumberoremailblankrule”.
4. Enter the description as “phone number and email number should not be blank”.
5. Enter the formula as “OR( ISBLANK( phone\_number\_\_c ) , ISBLANK( email\_\_c ) )” and check the syntax.

The screenshot shows the 'Validation Rule Edit' dialog box. It has fields for Rule Name ('phonenumeroremailblankrule'), Active status (checked), and Description ('phone number and email should not be blank'). The 'Error Condition Formula' field contains 'OR( ISBLANK( phone\_number\_\_c ) , ISBLANK( email\_\_c ) )'. A tooltip for 'ISBLANK' is shown, defining it as a function that returns true if a value is blank. The dialog also includes a 'Save' button, a 'Save & New' button, and a 'Cancel' button. A 'Quick Tips' section with 'Operators & Functions' is visible on the right.

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

The screenshot shows the Validation Rule Editor in Salesforce. A formula is being built in the main text area:

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

A tooltip for the `ISBLANK` function is open, listing other related functions like `ACOS`, `ADDMONTHS`, `AND`, `ASCII`, and `ASIN`. Below the tooltip, there's a link to "Insert Selected Function" and a description of the `ABS` function.

Below the formula editor, there's a section titled "Error Message" with the following details:

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

At the bottom right are "Save", "Save & New", and "Cancel" buttons.

- 9.
10. Save the validation rule.

## 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 Object Manager in Salesforce. The "Page Layouts" section is selected. It displays two items:

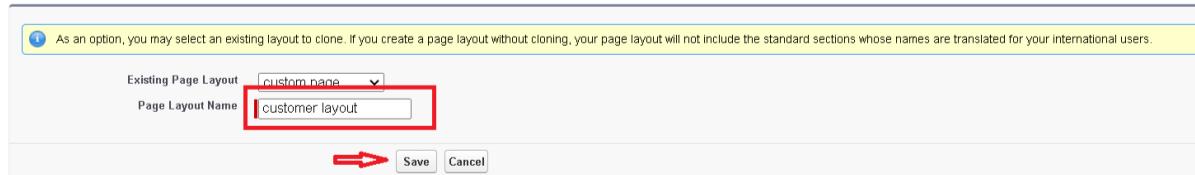
PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
customer Layout	udayrushi yelagandula, 04/07/2023, 11:43 am	udayrushi yelagandula, 05/07/2023, 10:01 am
personal details	udayrushi yelagandula, 10/07/2023, 10:39 am	udayrushi yelagandula, 10/07/2023, 10:39 am

At the top left, the breadcrumb navigation is shown as **SETUP > OBJECT MANAGER consumer**.

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

## Create New Page Layout

Help

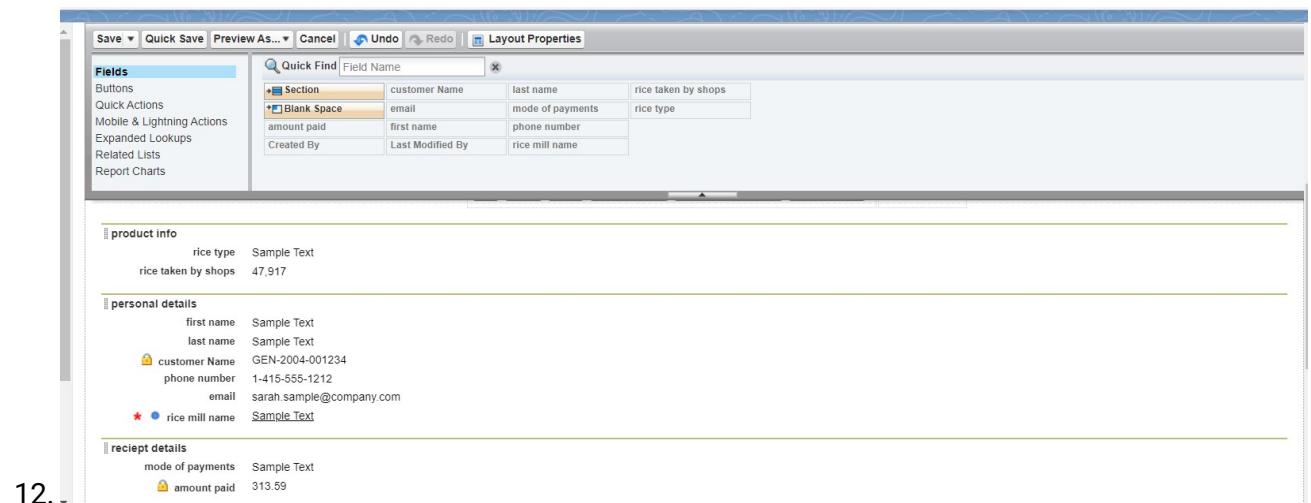


As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names are translated for your international users.

Existing Page Layout: custom page  
Page Layout Name: customer layout

Save Cancel

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 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.



Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Section	Field Name	Type
Section	customer name	last name
Blank Space	email	mode of payments
	amount paid	rice type
	first name	phone number
	Created By	rice mill name
	Last Modified By	

product info

rice type: Sample Text  
rice taken by shops: 47.917

personal details

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

receipt details

mode of payments: Sample Text  
amount paid: 313.59

12..

## 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.

1. Contract Manager
2. Read Only
3. Marketing User
4. Solutions Manager
5. Standard User
6. 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.

**Profile Detail**

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

**Page Layouts**

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

2.

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

**Custom Object Permissions**

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

3.

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

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

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

5. And click save.

## 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.

## 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.
3. Click on Expand All and click on add role under whom this role works.
4. Give Label as “owner” and Role name gets auto populated. Then click on Save.
5. Click and save it

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

Buttons: Save, Save & New, Cancel

The screenshot shows the Salesforce Setup Roles page. On the left, there's a sidebar with a search bar and sections for Users (Roles), Feature Settings (Sales, Contact Roles on Contracts, Contact Roles on Opportunities), Service (Case Teams, Case Team Roles, Contact Roles on Cases), and Global Search. The main area is titled "Creating the Role Hierarchy" and shows the "Your Organization's Role Hierarchy". The hierarchy tree is as follows:

- Nirma University
  - CEO
  - CFO
  - COO
  - owner
  - employee
  - worker
  - SVP.Customer Service & Support

Each node has "Edit | Del | Assign" options next to it. There's also a "Show in tree view" button at the top right of the tree.

## 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.

## 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
  - a. First Name : vicky
  - b. Last Name : y
  - c. Alias : Give a Alias Name
  - d. Email id : Give your Personal Email id
  - e. Username : Username should be in this form: text@text.text
  - f. Nick Name : Give a Nickname
  - g. Role : owner
  - h. User license : Salesforce
  - i. Profiles : owner.
3. Save it

The screenshot shows the Salesforce 'User Edit' page for a user named 'vicky y'. The page is titled 'User Edit' and has tabs for 'General Information', 'Profile & Permissions', 'Object Permissions', and 'Advanced'. The 'General Information' tab is selected. The user's first name is 'vicky', last name is 'y', alias is 'vy', email is 'ramesh0820@gmail.com', and username is 'ramesh0820@754123gmail'. The role is set to 'OWNER', user license to 'Salesforce', and profile to 'OWNER'. The 'Active' checkbox is checked. Other optional checkboxes like 'Marketing User', 'Offline User', etc., are unchecked. The 'Data.com User Type' dropdown is set to 'None'. The 'Data.com Monthly Addition Limit' field is set to 300.

## 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
  - a. First Name : ram
  - b. Last Name : ram
  - c. Alias : Give a Alias Name
  - d. Email id : Give your Personal Email id
  - e. Username : Username should be in this form: text@text.text

- f. Nick Name : Give a Nickname
- g. Role : employer
- h. User license : Salesforce platform
- i. Profiles : standard platform user.

User Edit  
vicky y

User Edit

General Information

First Name	vicky	Role	owner
Last Name	y	User License	Salesforce
Alias	ivy	Profile	owner
Email	ramesh0820@gmail.com	Active	<input checked="" type="checkbox"/>
Username	ramesh0820@754123gmail	Marketing User	<input type="checkbox"/>
Nickname	vicky	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	--None--
		Data.com Monthly Addition Limit	300

3. Go to setup → type users in quick find box → select users → click New user.
4. Fill in the fields
  - a. First Name : ragu
  - b. Last Name : raj
  - c. Alias : Give a Alias Name
  - d. Email id : Give your Personal Email id
  - e. Username : Username should be in this form: text@text.text
  - f. Nick Name : Give a Nickname
  - g. Role : worker
  - h. User license : Salesforce platform
  - i. Profiles : standard platform user.

User Edit

User Edit

General Information

First Name	ragu	Role	worker
Last Name	raj	User License	Salesforce Platform
Alias	rraj	Profile	Standard Platform User
Email	ramesh0820@gmail.com	Active	<input checked="" type="checkbox"/>
Username	ramesh0820@73690gmail.com	Marketing User	<input type="checkbox"/>
Nickname	raj	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	--None--
		Data.com Monthly Addition Limit	300

## 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.
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.

**Note : create the latest “10” records in consumer objects.**

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

## 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

**1. Tabular Reports:** Simple listing of data without any subtotals. This type of reports provide you most basically to look at your data. Use tabular reports when you want a simple list or a list of items with a grand total.

Example: This type of reports are used to list all accounts, List of contacts, List of opportunities.....etc.....

**2. Summary Reports:** This type of reports provide a listing of data with groupings and sub totals. Use summary reports when you want subtotals based on the value of a particular field or when you want to create a hierarchically grouped report, such as sales organized by year and then by quarter.

Example: All opportunities for your team sub totaled by Sales Stage and Owner.

**3. Matrix Reports:** This type of reports allow you to group records both by row and by column. A comparison of related totals, with totals by both row and column. Use matrix reports when you want to see data by two different dimensions that aren't related, such as date and product.

Example: Summarize opportunities by month vertically and by account horizontally.

**4. Joined Reports:** Blocks of related information in a single report. This type of reports enable you to adopt five different blocks to display different types of related data. Each block can own unique columns, summary fields, formulas, filters and sort order. Use joined reports to group and show data from multiple report types in different views.

Example: You can build a report to show opportunity, case and activity data for your accounts.

## Activity 1: Create Report

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

The screenshot shows the 'Reports' section of an application. At the top, there's a navigation bar with tabs for 'My Rice', 'suppliers', 'rice mills', 'rice details', 'consumers', 'Reports' (which is currently active), and a search bar. Below the navigation is a sidebar with categories like 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports'. The main area displays a table of recent reports with columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. The first two reports are titled 'range of amount per day' and are categorized under 'Estimated rice per day'. The third report is titled 'Sample Flow Report: Screen Flows' and is categorized under 'Public Reports'.

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 is a sidebar with a tree view of categories: 'Recently Used' (Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, Price Books, Products and Assets) and 'All' (selected). The main area has a search bar with the text 'cons'. Below the search bar is a table with columns 'Report Type Name' and 'Category'. There is one entry: 'rice mills with consumers' under '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.

The screenshot shows the Zoho Reports interface with the following details:

- Report Title:** New rice mills with consumers Report
- Fields Section:**
  - Groups:** Groups, GROUP ROWS (selected), Add group...
  - Columns:** consumer: consumer name, rice type, rice price/kg, mode of payments, amount paid
  - Row Counts:** Row Counts, Detail Rows, Subtotals, Grand Total
- Report Preview:** Shows a table with 11 rows of data, grouped by 'rice taken by shops'. The columns are consumer: consumer name, rice type, rice price/kg, mode of payments, and amount paid.
- Buttons:** Add Chart, Save & Run, Save, Close, Run

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

The screenshot shows the Zoho Reports interface with the following details:

- Report Title:** range of amount per day
- Fields Section:**
  - Groups:** rice taken by shops (selected), consumer: consumer name, rice type, rice price/kg, mode of payments, amount paid
  - Row Counts:** Row Counts, Detail Rows, Subtotals, Grand Total
- Report Preview:** Shows a table with 11 rows of data, grouped by 'rice taken by shops'. The columns are consumer: consumer name, rice type, rice price/kg, mode of payments, and amount paid.
- Buttons:** Enable Field Editing, Add Chart, Edit, Run

## Activity 2: Sharing report to owner

1. Click edit drop down and select subscribe option

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

Report: rice mills with consumers  
range of amount per day

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

2.

3. Follow as per below image.

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

Cancel  Save

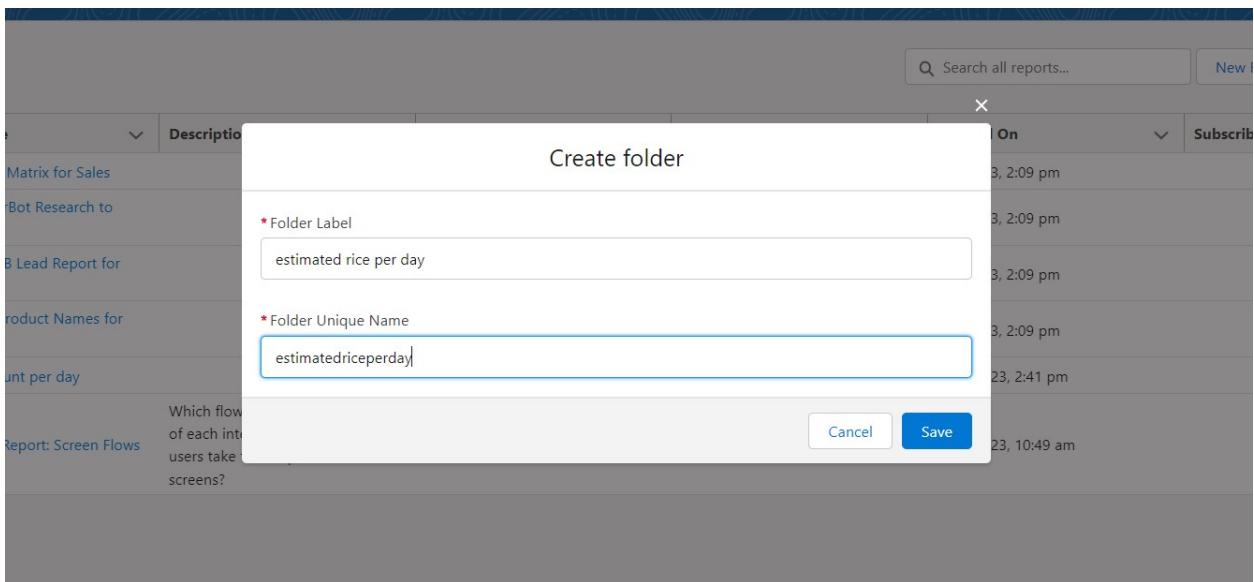
4.

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.**

## 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

REPORTS

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

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

Run

Edit

Subscribe

Export

Delete

Add to Dashboard

Favorite

Move

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

Move range of amount per day

All Folders

Report Name	Description
Erin's SB Opp Matrix for Sales	
Lincoln's SolarBot Research to remove	
Marketing's SB Lead Report for Sales	
Potential SB Product Names for R&D	
range of amount per day	Which flow of each interview, and how long do users take to complete the screens?

estimated rice per day

New Folder Cancel Select

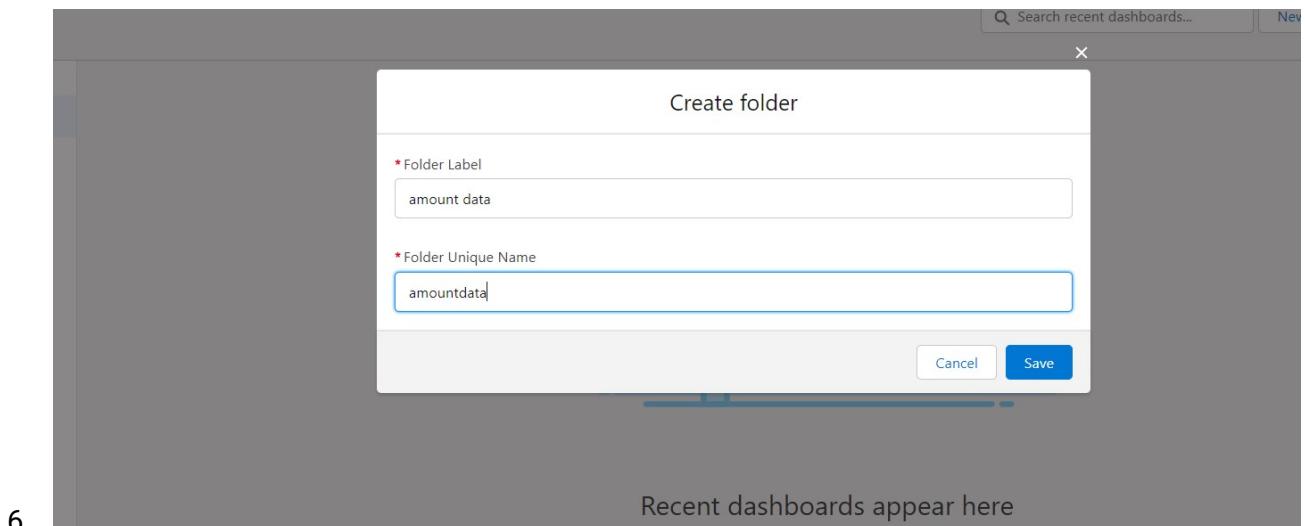
Note: if you want to see the report which you have created then go to reports - all folders - estimated rice per day - your report will appear in this way.

## 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.

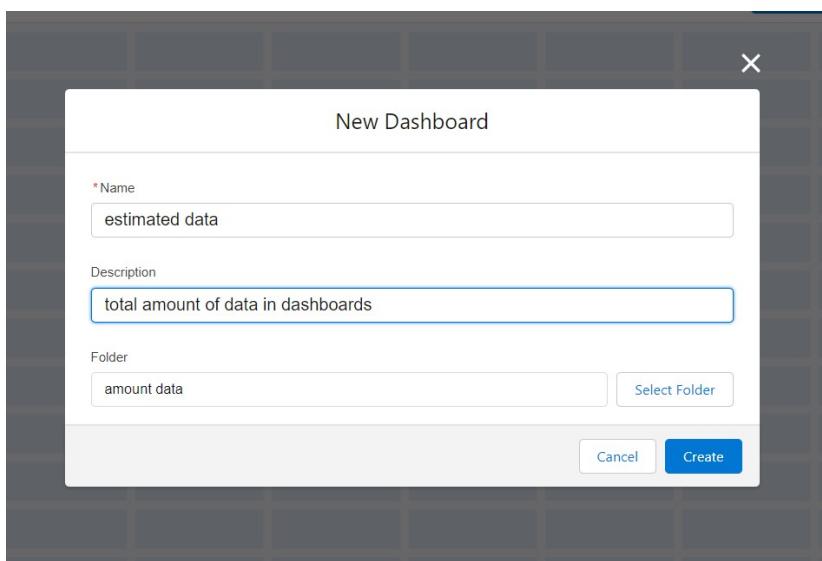
## Activity 1: Create Dashboard Folder

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.

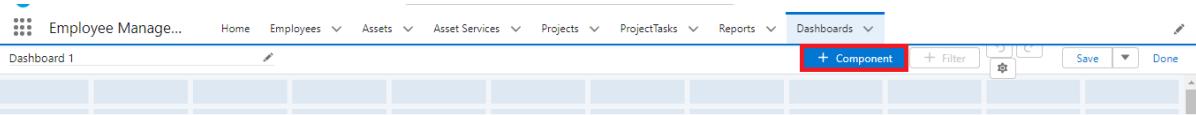


## Activity 2: Create Dashboard

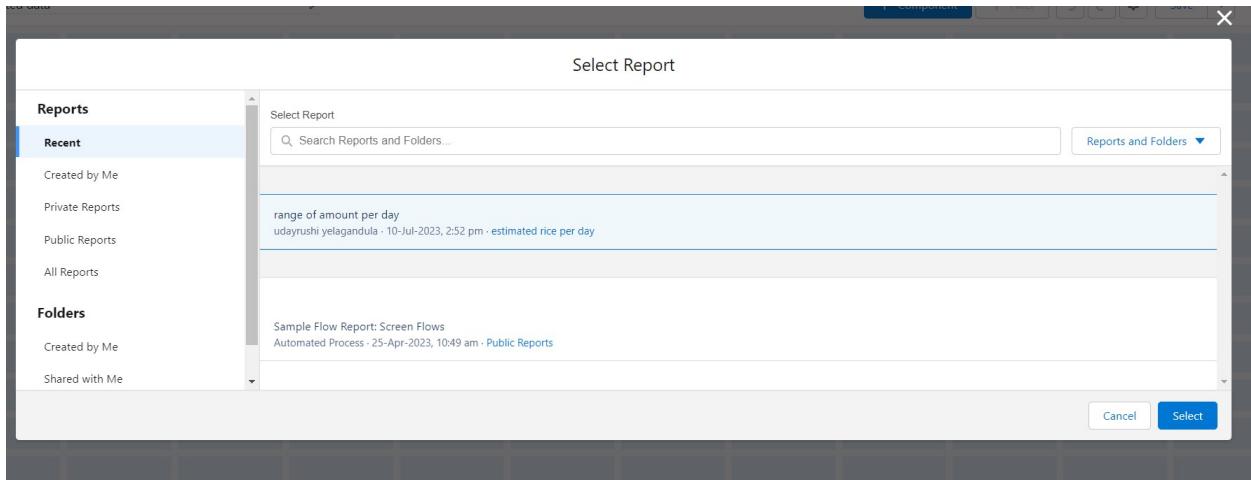
1. Go to the app → click on the Dashboards tabs.
2. Give a Name and select the folder that was created, and click on create.



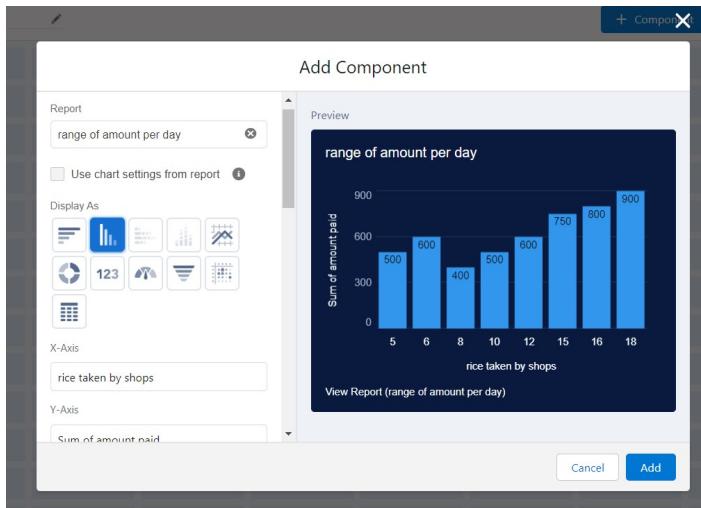
## 1. Select add component.



## 1. Select a Report and click on select.



## 1. Preview is shown below.



Display as- vertical bar chart

X-axis - rice taken by shops

Y-axis- sum of amount

Y-axis range - automatic

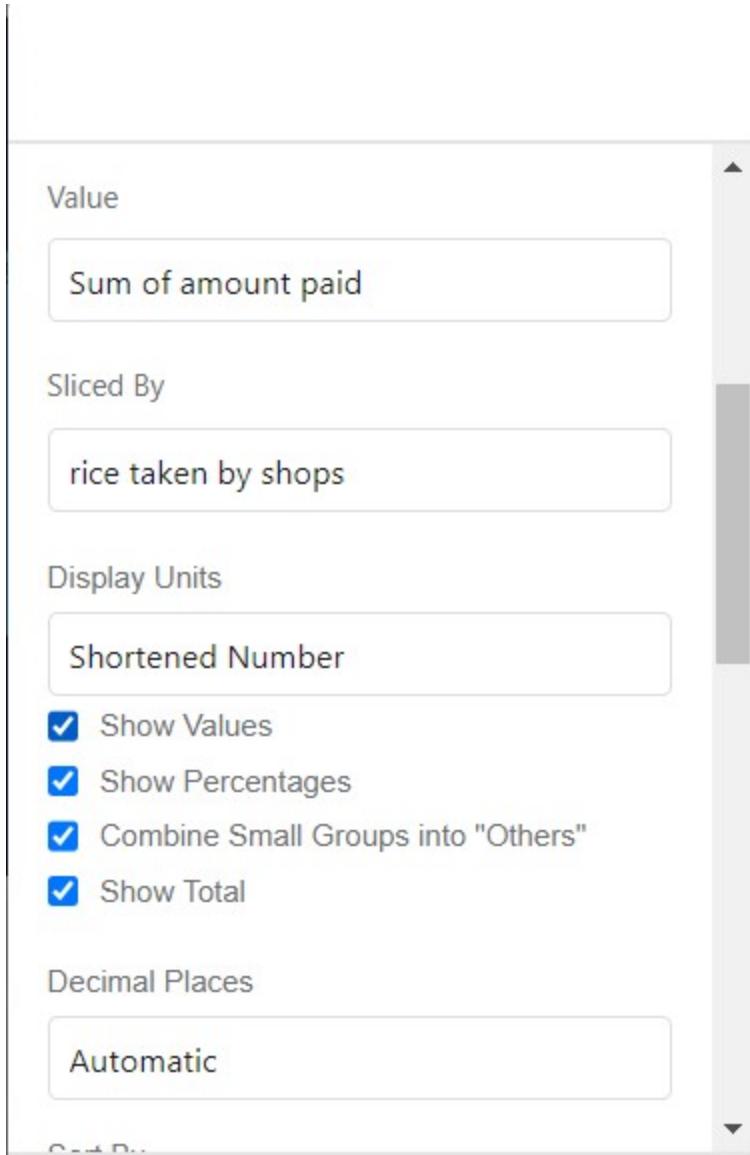
Sort by - rice taken by shops

Component theme - dark.

Add the component

Again select add component with above same steps

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



Click add.

Click save and done.

### Final Report:

The screenshot shows a Salesforce report titled "range of amount per day". The report summary at the top indicates 10 total records, a total rice price/kg of 55, and a total amount paid of 3,500.00. The main table lists consumer details such as consumer ID, name, rice type, price/kg, mode of payment, and amount paid. A subtotal row shows 55 records and a total amount of 2,000.00. Another row shows 20 records with a total amount of 500.00. The bottom of the report includes checkboxes for Row Counts, Detail Rows, Subtotals, and Grand Total.

Total Records	Total rice price/kg	Total Amount Paid
10	55	3,500.00

	consumer: consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
10 (7)	consumers-008	normal rice	25	Credit card	250.00
	consumers-004	basmati	25	Credit card	250.00
	consumers-009	basmati	30	Net banking	300.00
	consumers-007	basmati	30	Cash	300.00
	consumers-005	normal rice	30	Cash	300.00
	consumers-003	normal rice	30	UPI	300.00
	consumers-001	basmati	30	Credit card	300.00
Subtotal			55		2,000.00
20 (3)	consumers-006	basmati	25	Debit card	500.00
	consumers-002	normal rice	25	Net banking	500.00

To Do List

### Final Dashboard look:

The screenshot shows a Salesforce dashboard titled "estimated data". The dashboard header displays the total amount of data in dashboards and the date as of 28-Jun-2024, 2:51 am, viewing as TRUSHYA VITHLANI. The dashboard contains two charts: a bar chart titled "range of amount per day" showing the sum of rice price/kg for 10 and 20, and a donut chart titled "range of amount per day" showing the sum of rice price/kg for 55, 25, and 10.

Dashboard: estimated data  
total amount of data in dashboards  
As of 28-Jun-2024, 2:51 am-Viewing as TRUSHYA VITHLANI

rice taken by shops in kgs	Sum of rice price/kg
10	55
20	20

range of amount per day

Sum of rice price/kg

rice taken by shops in kgs

View Report (range of amount per day)

range of amount per day

Sum of rice price/kg

rice taken by shops in kgs

View Report (range of amount per day)