

**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

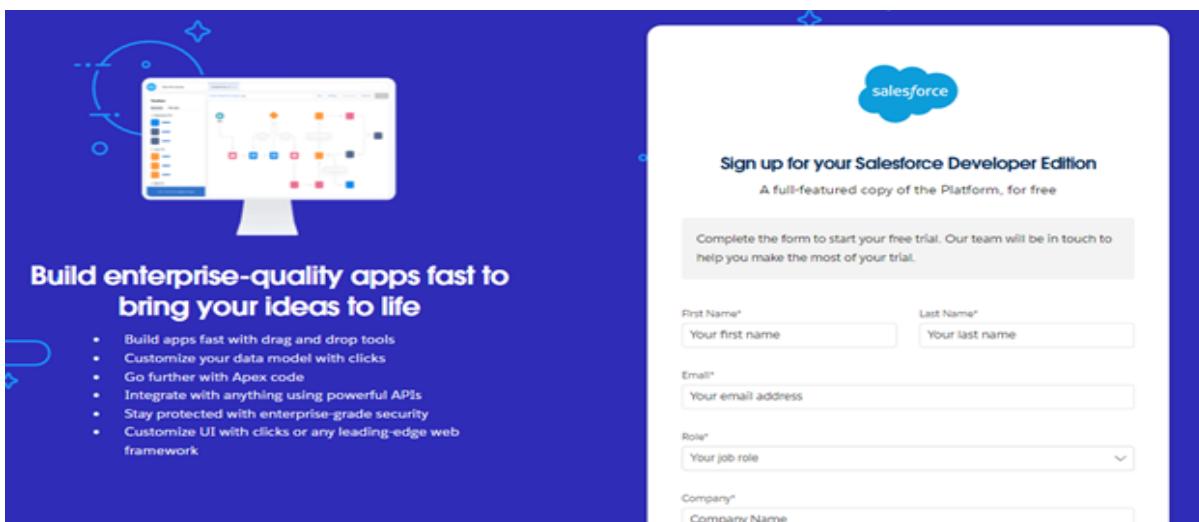
Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

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

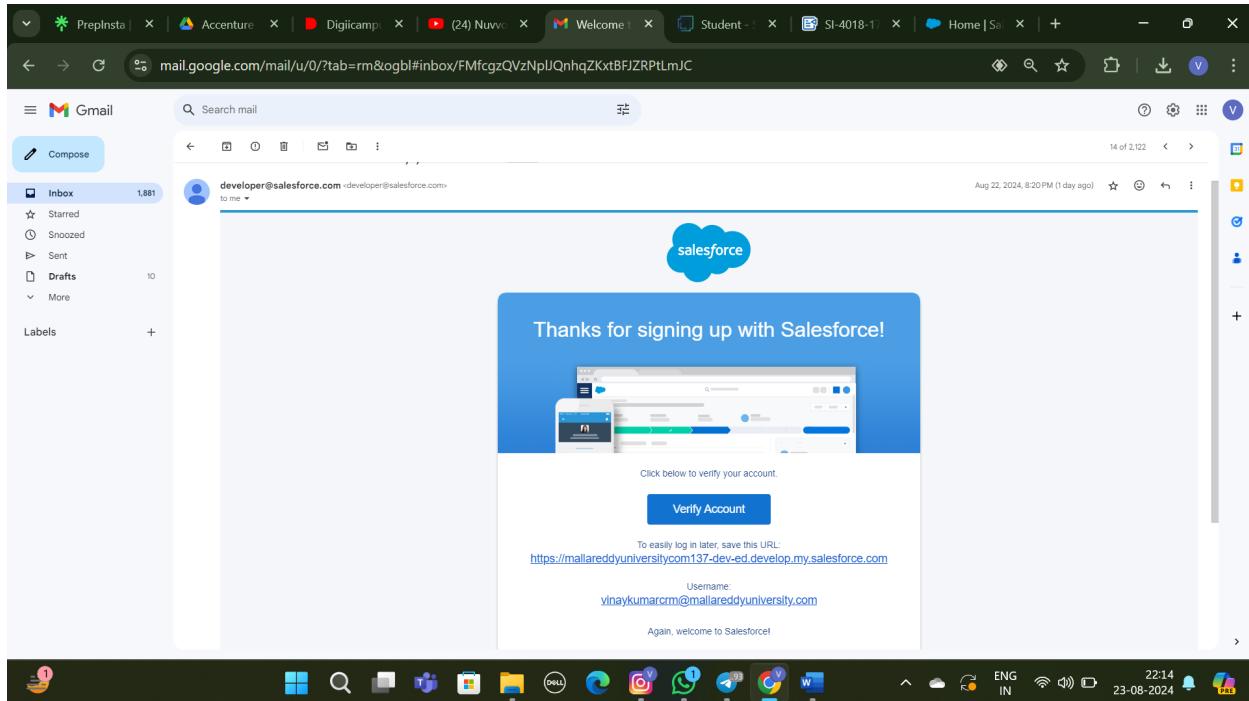
This need not be an actual email id, you can give anything in the format : username@organization.com

**USERNAME : vinaykumarcrm@mallareddyuniiversity.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:

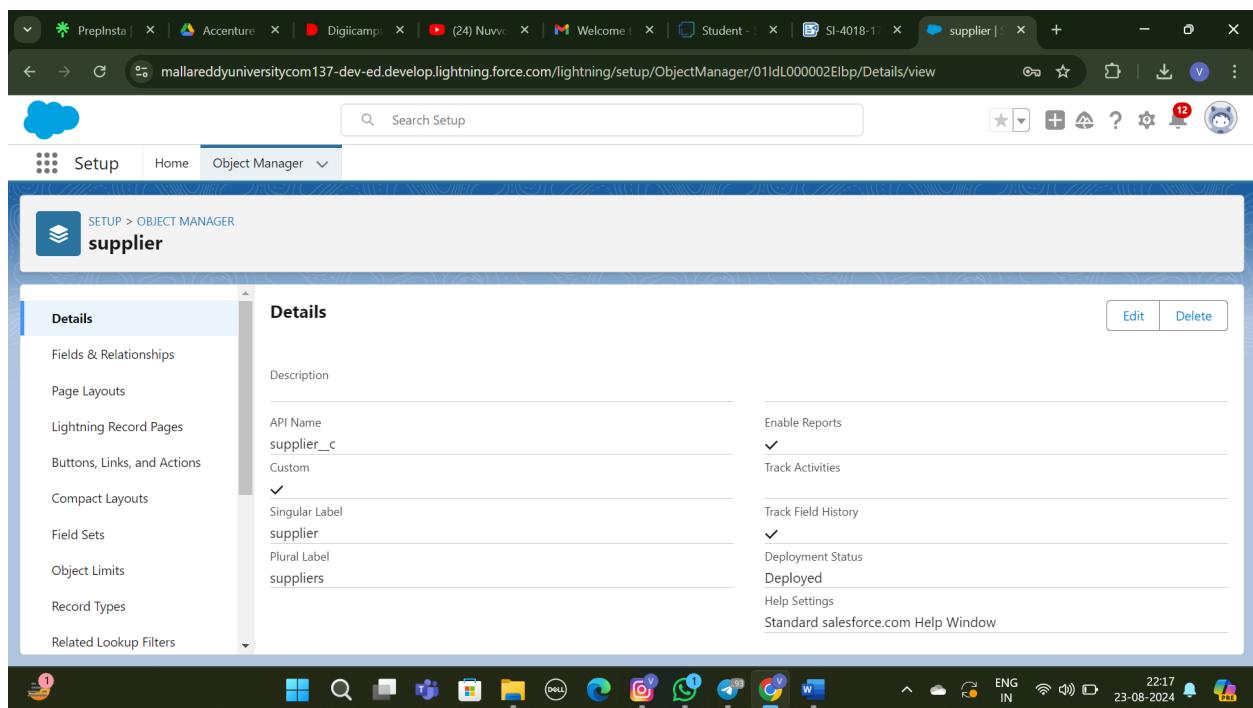
1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
2. On Custom object defining page:

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:

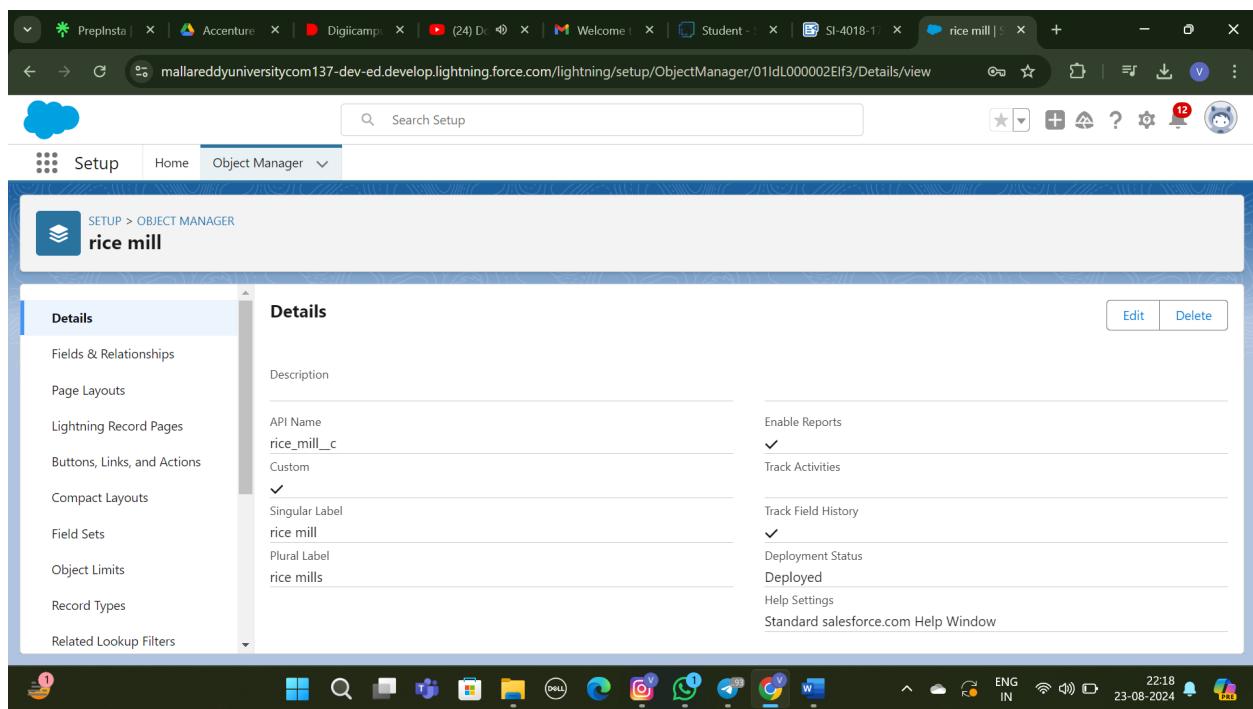
1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
2. Enter the label name → **supplier**
3. Plural label name → supplier
4. Enter Record Name Label and Format
5. Record Name → supplier Name
6. Data Type → Text
7. Click on Allow reports and Track Field History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

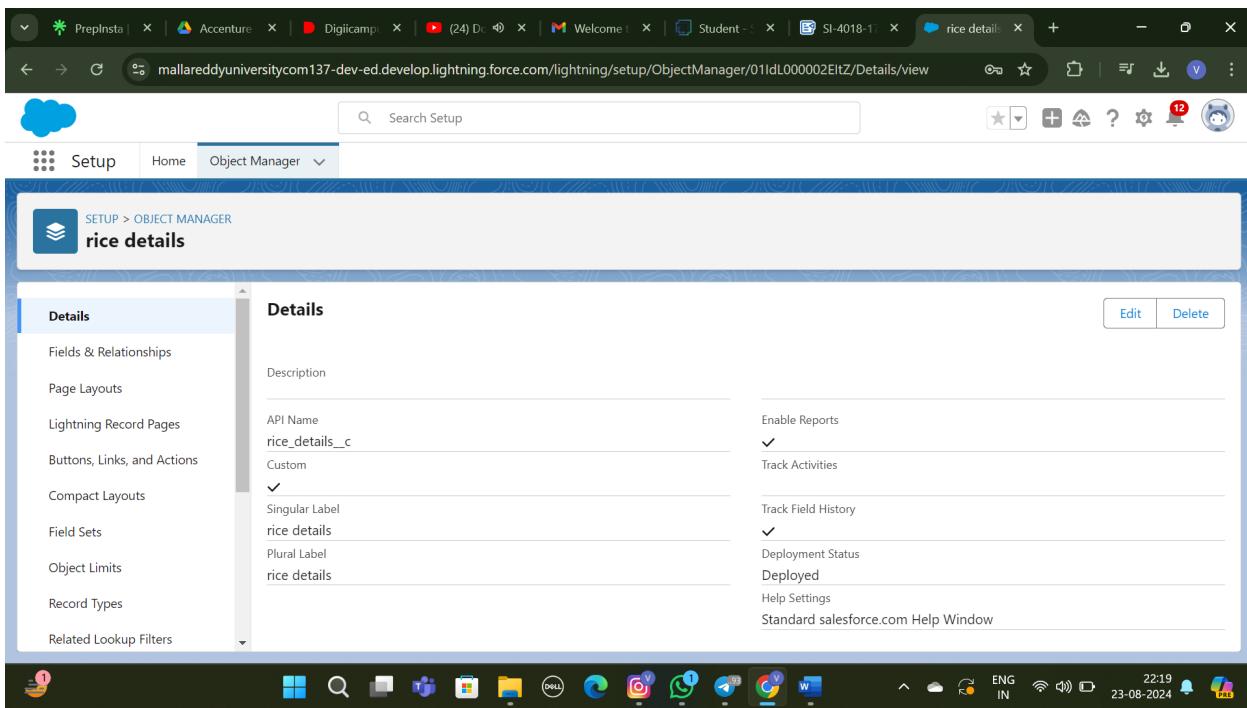
1. label name → **consumer**
2. Plural label name → **consumers**
3. Display Format → **consumers-{000}**
4. Starting number → 1

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Preplinsta', 'Accenture', 'DigiCampus', 'Welcome', 'Student', 'SI-4018-1', and 'consumer'. Below the navigation is a search bar labeled 'Search Setup' and a toolbar with various icons. The main area displays the 'consumer' object details. On the left, a sidebar lists 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 main 'Details' section shows the following fields:

- Description: [empty]
- API Name: consumer\_c
- Custom: ✓
- Singular Label: consumer
- Plural Label: consumers
- Enable Reports: ✓
- Track Activities: ✓
- Track Field History: ✓
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

#### 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



## 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 .

The screenshot shows the Salesforce Setup interface. In the top navigation bar, there are several tabs including 'Preplinsta', 'Accenture', 'DigiCampus', 'Welcome', 'Student', 'SI-4018-1', 'Tabs | Sales', and others. The current tab is 'Custom Tabs'. The main content area is titled 'Custom Tabs' and contains a sub-section titled 'Custom Object Tabs'. This section lists four custom tabs with the following details:

Action	Label	Tab Style	Description
Edit   Del	consumers	Shopping Cart	
Edit   Del	rice details	CRT TV	
Edit   Del	rice mills	Factory	
Edit   Del	suppliers	Box	

Below this table, there is a link labeled 'Web Tabs'.

## 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.

App Settings

App Details & Branding

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Details

\* App Name: MY RICE

\* Developer Name: MY\_RICE

Description: Enter a description...

App Branding

Image: An image of three rice grains.

Primary Color Hex Value: #0070D2

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

App Launcher Preview

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.

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

Available Items

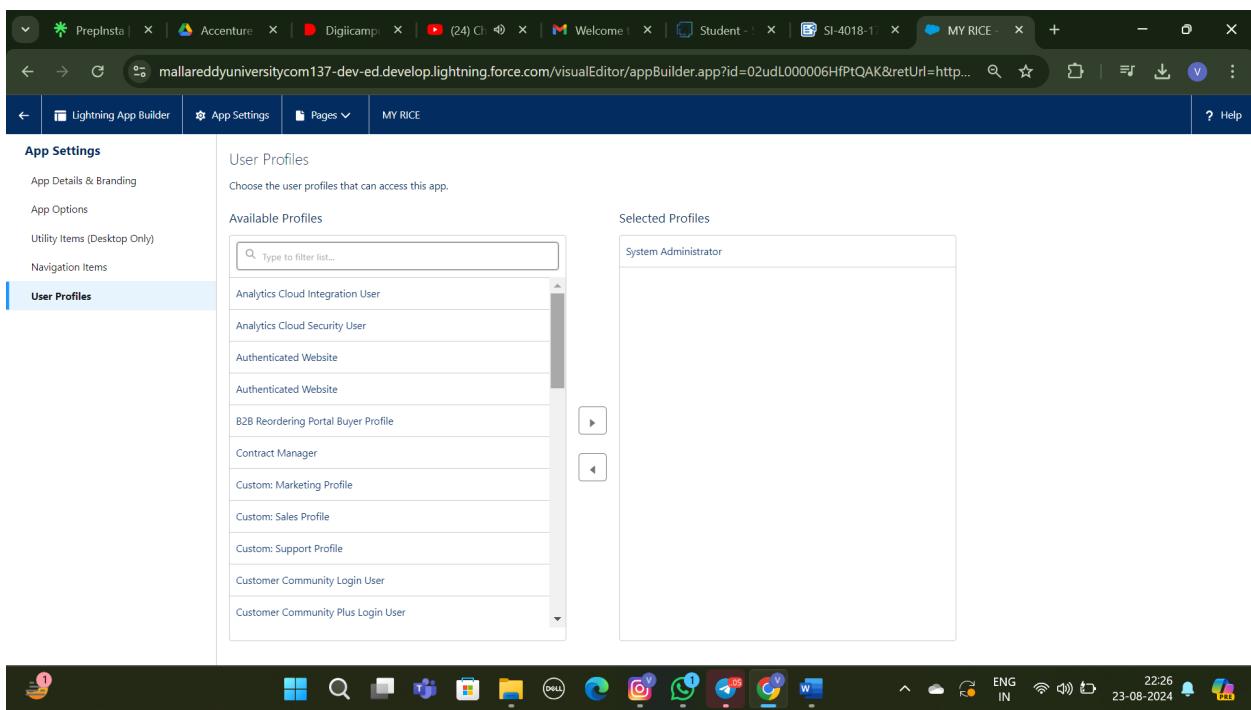
Type to filter list...

Selected Items

- suppliers
- rice mills
- rice details
- consumers

#### 5. To Add User Profiles:

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



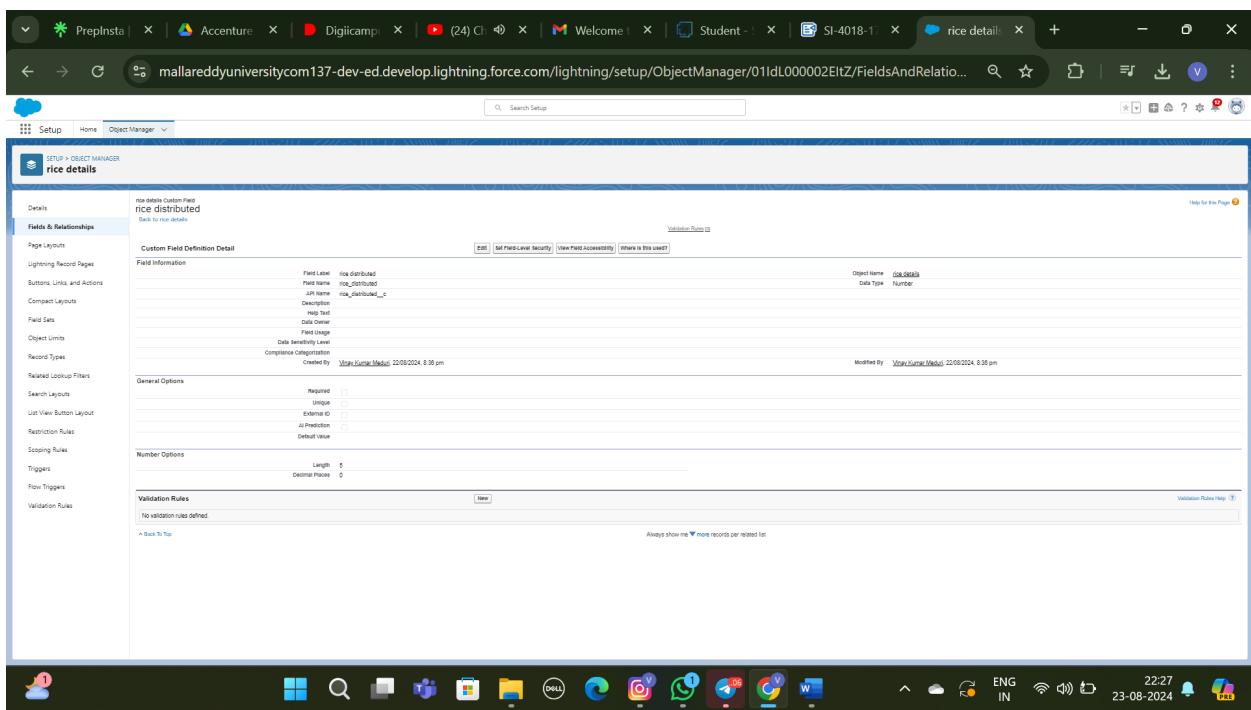
## FIELDS

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



## 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 for creating a custom field named 'supplier Name'. The 'Object Manager' tab is selected. The 'rice details' object is chosen. Under 'Fields & Relationships', the 'Master-Detail Options' section is active. It shows 'Related To' set to 'supplier' and 'Related List Label' set to 'rice details'. The 'Data Type' is listed as 'Master-Detail'. Other tabs like 'Validation Rules' and 'Lookup Filter' are visible but inactive.

### 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.

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

- Object Manager:** consumer
- Custom Field Name:** rice mill name
- Field Type:** Master-Detail
- Related Object:** rice mill
- Field Label:** rice mill name
- API Name:** rice\_mill\_name\_\_c
- Object Name:** consumer
- Data Type:** Master-Detail
- Validation Rules:** None defined.

#### 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

The screenshot shows the Salesforce Object Manager interface for the 'supplier' object. A new custom field named 'sum of rice distributed' has been created. The 'Field Information' section shows the following details:

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	

The 'Object Name' is set to 'supplier'. The 'Roll-Up Summary Options' section indicates a roll-up summary for the 'rice\_details' field, with the summary type set to 'SUM'.

The screenshot shows the Salesforce Object Manager interface for the 'supplier' object. A new custom field named 'rice distributed to shops' has been created. The 'Field Information' section shows the following details:

Field Label	rice distributed to shops
Field Name	rice_distributed_to_shops
API Name	rice_distributed_to_shops_c
Description	
Help Text	
Compliance Categorization	supplier Custom Field: rice distributed to shops ~ Salesforce - Developer Edition

The 'Object Name' is set to 'Supplier'. The 'Roll-Up Summary Options' section indicates a roll-up summary for the 'rice\_details' field, with the summary type set to 'SUM'.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes links for Preplinsta, Accenture, DigiCampus, YouTube, Google Sheets, Student, and SI-4018-1. The main page title is "rice mill | S". The left sidebar under "Object Manager" lists various setup categories like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area displays the "rice taken" custom field definition for the "rice mill" object. The field information includes:

Field Label	rice taken	Object Name	rice mill
Field Name	rice_taken		
API Name	rice_taken_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Vinay Kumar Meduri	Modified By	Vinay Kumar Meduri
	22/08/2024, 10:20 pm		22/08/2024, 10:20 pm

Below this, the "Roll-Up Summary Options" section shows:

Data Type	Roll-Up Summary	Summary Type	SUM
Summarized Object	consumer		
Field to Aggregate	consumer_rice_taken_by_shops_in_kgs		
Filter Criteria			

The bottom of the screen shows the Windows taskbar with various icons and the system tray indicating the date (23-08-2024), time (22:33), and language (ENG IN).

## 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.

The screenshot shows the Salesforce Object Manager interface for the 'rice details' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Fields & Relationships. The main content area displays the 'Fields & Relationships' section with a table showing field details:

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_c	Master-Detail(rice mill)		✓
supplier Name	supplier_Name_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"

The screenshot shows the Salesforce Object Manager interface for the 'rice mill' object. The left sidebar lists various setup options. The main content area displays the 'Fields & Relationships' section with a table showing field details:

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 (SUM consumer)		

## Activity 7: Creating Fields in consumer Objects

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid__c	Formula (Number)		
Consumer Name	Consumer_Name__c	Formula (Text)		
Consumer Name	Name	Auto Number		
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(18, 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 with the 'Object Manager' selected. A custom field named 'Amount Paid' is being created for the 'consumer' object. The 'Field & Relationships' tab is active. The 'Custom Field Definition Detail' page displays the following information:

- Field Information:** Field Label: Amount Paid, Field Name: Amount\_Paid, API Name: Amount\_Paid\_c.
- Formula Options:** Data Type: Formula, Decimal Places: 2. The formula entered is: Rice\_taken\_by\_shops\_c \* rice\_mill\_name\_r.rice\_price\_kg\_c.
- Object Name:** consumer
- Created By:** Vinay Kumar Meduri, 22/08/2024, 11:21 pm
- Modified By:** Vinay Kumar Meduri, 23/08/2024, 12:01 am

The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The bottom taskbar shows system status and system time (23-08-2024, 22:37).

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 tabs like 'Preplinsta', 'Accenture', 'DigiCampus', 'Welcome', 'Student', 'SI-4018-1', and 'consumer'. The main title is 'SETUP > OBJECT MANAGER consumer'. On the left, a sidebar lists various setup categories such as 'Details', 'Fields & Relationships' (which is selected), 'Page Layouts', 'Lightning Record Pages', etc. The right pane displays the 'Custom Field Definition Detail' for the 'Consumer Name' field. Key details shown include:

- Field Information:** Field Label: Consumer Name, Field Name: Consumer\_Name, API Name: Consumer\_Name\_\_c.
- Formula Options:** Data Type: Formula, Formula: First\_name\_\_c +''+ Last\_name\_\_c.
- Created By:** Vinay Kumar Meduri, 22/08/2024, 11:22 pm.
- Modified By:** Vinay Kumar Meduri, 22/08/2024, 11:22 pm.

### 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.

The screenshot shows the Salesforce Setup interface for the 'consumer' object. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area is titled 'consumer Validation Rule'. It displays a table with the following data:

Validation Rule Detail	Rule Name	Description
<a href="#">Edit</a> <a href="#">Clone</a>	Phonenumberoremailblankrule	Active
Error Condition Formula	OR(ISBLANK(Phone_number_c), ISBLANK(email_c))	
Error Message	please fill in your phone number	Error Location
Description	phone number and email number should not be blank	
Created By	Vinay Kumar Meduri, 22/08/2024, 11:24 pm	Modified By
		Vinay Kumar Meduri, 22/08/2024, 11:24 pm

At the bottom of the page, there are 'Edit' and 'Clone' buttons.

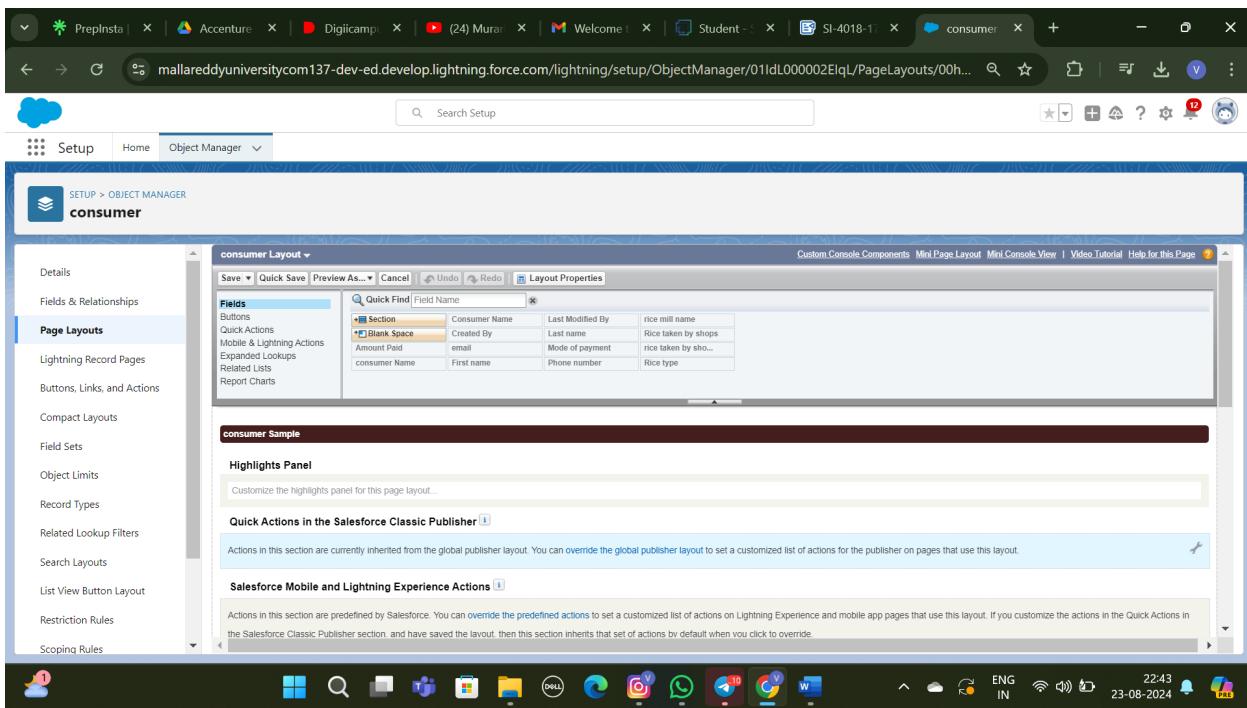
## PAGE LAYOUTS

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.
1. 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.
2. Give access and save it.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The 'owner' profile is selected. The 'Profile Detail' section shows the profile name 'owner', user license 'Salesforce', and creation details. The 'Page Layouts' section lists various standard object layouts like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, and Opportunity. The 'Object Permissions' section is partially visible at the bottom. The URL in the browser is ...Salesforce.com/00edL000006DAVx?appLayout=setup&tour=&isdtlp=p1&st...

## 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 Setup interface with the 'Profiles' page open. The 'employer' profile is selected. The 'Profile Detail' section shows the profile name 'employer', user license 'Salesforce', and creation details. The 'Page Layouts' section lists various standard object layouts. The 'Object Permissions' section is partially visible at the bottom. The URL in the browser is ...Salesforce.com/00edL000006DApJ?appLayout=setup&tour=&isdtlp=p1&st...

## 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 Setup interface with the 'Profiles' page selected. On the left, the navigation sidebar includes sections like Hyperforce Assistant, Users, Data, Feature Settings, Data.com, Marketing, Sales, and Products. The main content area shows the 'worker' profile details. Under 'Profile Detail', the 'Custom Profile' checkbox is checked. The 'Page Layouts' section lists various standard object layouts for different record types. At the bottom of the page, there is a status bar with system icons and the date/time (23-08-2024, 22:47).

## 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.
1. Repeat the same steps, for another role.
2. Click plus on CEO role, and click plus on owner, and click add role under employer.

3. give Label as "worker" and Role name gets auto populated. Then click on Save.

The screenshot shows the Salesforce Setup Roles page. On the left, there's a sidebar with a search bar and sections for Feature Settings, Sales, Service, and Case Teams. The main area is titled 'Creating the Role Hierarchy' and shows a tree view of roles under 'Your Organization's Role Hierarchy'. The hierarchy includes 'Malla Reddy University' at the top, followed by 'CEO', 'CFO', 'COO', 'owner', 'employer', 'worker', 'SVP\_Customer Service & Support', 'SVP\_Human Resources', and 'SVP\_Sales & Marketing'. Each role has 'Edit | Del | Assign' options. A message at the bottom says 'You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.' A 'Help for this Page' link is also present.

## 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.

User  
vicky y

Name: vicky y  
Alias: vy  
Email: vinaykumarmeduri15@gmail.com [Verify] [View](#)  
Username: Vinay@kumar.meduri  
Nickname: vinay [View](#)  
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: owner  
User License Profile: Salesforce  
Active:   
Marketing User:   
Offline User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:   
Mobile Push Registrations: [View](#)  
Data.com User Type: [View](#)  
Accessibility Mode (Classic Only):  [View](#)  
Debug Mode:  [View](#)  
High-Contrast Palette on Charts:  [View](#)

## 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.

User  
ram ram

Name: ram ram  
Alias: rram  
Email: vinyakumarmeduri15@gmail.com [Verify] [View](#)  
Username: ram@ram.ram123  
Nickname: rama [View](#)  
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:   
Marketing User:   
Offline User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:   
Mobile Push Registrations: [View](#)  
Data.com User Type: [View](#)  
Accessibility Mode (Classic Only):   
Debug Mode:   
High-Contrast Palette on Charts:

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

4.Fill in the fields

First Name : ragu

Last Name : raj

Alias : Give a Alias Name

Email id : Give your Personal Email id

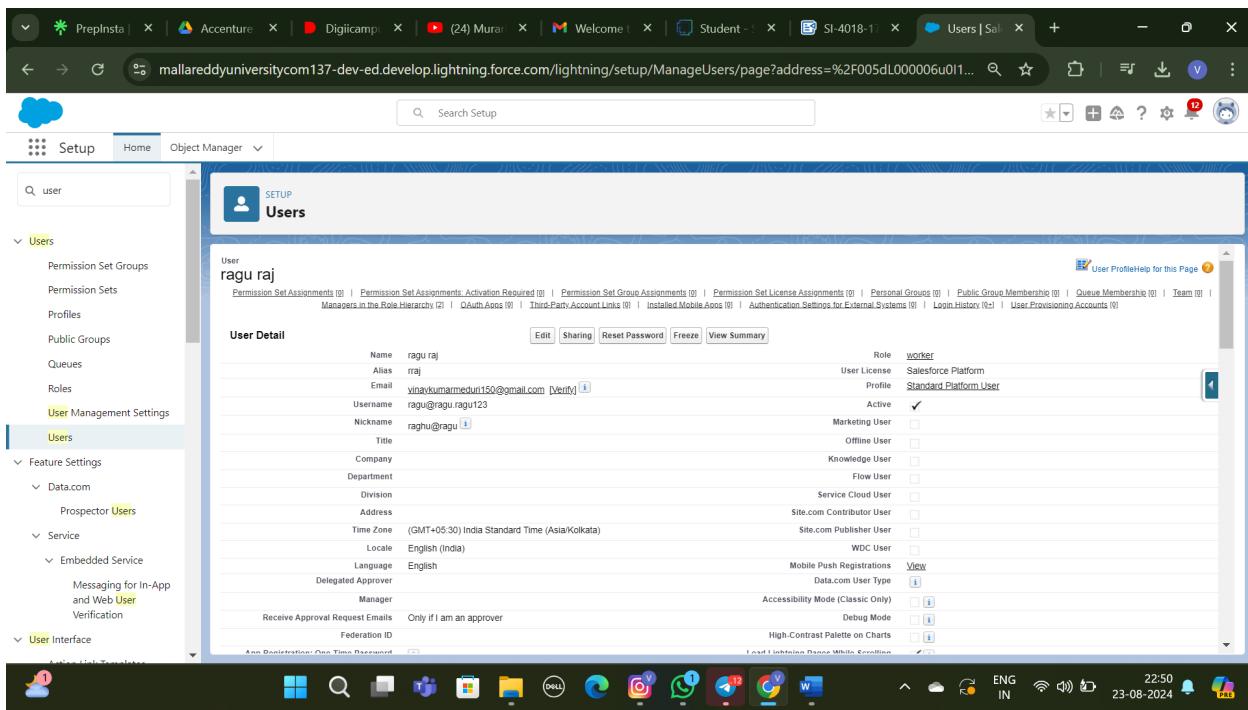
Username : Username should be in this form: text@text.text

Nick Name : Give a Nickname

Role : worker

User license : Salesforce platform

Profiles : standard platform user.



## 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 'Sharing Settings' page in the Salesforce Setup. The left sidebar has 'Sharing Settings' selected under 'Security'. The main content area is titled 'Sharing Settings' and contains a table of 'Organization-Wide Defaults' for various objects. The table has columns for 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. Most objects have 'Private' as the default internal access, except for Opportunity which is 'Public Read/Write'. External access is mostly 'Private', except for Contact which is 'Controlled by Parent'. Hierarchical access is checked for most objects.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓

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

The screenshot shows the 'consumers' list page in the Salesforce interface. The top navigation bar includes 'MY RICE', 'suppliers', 'rice mills', 'rice details', and 'consumers'. The main content area shows a list titled 'Recently Viewed' with 10 items. Each item is a consumer record with a checkbox and a link. The records are numbered 1 to 10. The right side of the screen has a toolbar with buttons 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.

Report: rice mills with consumers range of amount per day				
Total Records	Total rice price/kg	Total Amount Paid		
10	196	24,488.00		
<input type="checkbox"/> Rice taken by shops ↑ ▾ consumer: consumer Name ▾ Rice type ▾ rice price/kg ▾ Mode of payment ▾ Amount Paid ▾				
<input type="checkbox"/> 10 (2)	consumers-005	2.normal rice	100	Cash
	consumers-001	1.basmati	100	Credit card
<b>Subtotal</b>			100	2,000.00
<input type="checkbox"/> 12 (1)	consumers-002	2.normal rice	96	Debit card
<b>Subtotal</b>			96	1,152.00
<input type="checkbox"/> 13 (1)	consumers-003	1.basmati	100	Net banking
<b>Subtotal</b>			100	1,300.00
<input type="checkbox"/> 15 (2)	consumers-006	1.basmati	100	Credit card
	consumers-008	1.basmati	96	UPI
<b>Subtotal</b>			196	2,940.00
<input type="checkbox"/> 26 (1)	consumers-004	2.normal rice	96	UPI
<b>Subtotal</b>			96	2,496.00
<input type="checkbox"/> 34 (1)	consumers-009	2.normal rice	100	Net banking
<b>Subtotal</b>			100	3,400.00
<input checked="" type="checkbox"/> Row Counts <input type="checkbox"/> Detail Rows <input type="checkbox"/> Subtotals <input type="checkbox"/> Grand Total <input type="checkbox"/>				

#### **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.
  1. Click save.

The screenshot shows a Salesforce Lightning interface. On the left, there's a report titled "rice mills with consumers range of amount per day". The report details 10 rice mills, with a total price/kg of 196 and a total amount paid of 24,488.00. A modal window titled "Edit Subscription" is overlaid on the report. In the "Edit Subscription" window, the "Frequency" is set to "Daily", the "Time" is "8:00 am", and the recipient is "Me". There are also options for "Attachment" (Attach File) and "Run Report As" (Me or Another Person). At the bottom of the modal are "Unsubscribe", "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 a Salesforce Lightning interface with a sidebar on the left containing categories like Reports, Folders, and Favorites. The main area displays a table of reports and folders. A context menu is open over the folder 'estimated rice per day', with the 'Favorite' option highlighted.

Name	Created By	Created On	Last Modified By	Last Modified Date
Einstein Bot Reports	Automated Process	22/8/2024, 7:20 pm	Automated Process	22/8/2024, 7:20 pm
Einstein Bot Reports Spring '23	Automated Process	22/8/2024, 7:20 pm	Automated Process	22/8/2024, 7:20 pm
Einstein Bot Reports Summer '23	Automated Process	22/8/2024, 7:20 pm	Automated Process	22/8/2024, 7:20 pm
Einstein Bot Reports Summer '22	Automated Process	22/8/2024, 7:20 pm	Automated Process	22/8/2024, 7:20 pm
Einstein Bot Reports Winter '23	Automated Process	22/8/2024, 7:20 pm	Automated Process	22/8/2024, 7:20 pm
Enablement Dashboard Reports Spring '24	Automated Process	22/8/2024, 7:20 pm	Automated Process	22/8/2024, 7:20 pm
estimated rice per day	Vinay Kumar Meduri	23/8/2024, 12:44 am	Vinay Kumar Meduri	23/8/2024, 12:44 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.

Click save.

DASHBOARDS	Name	Description	Folder	Created By	Created On	Subscribed
Recent	estimated data	total amount of data in dashboards	amount data dashboard	Vinay Kumar Meduri	23/8/2024, 12:56 am	

## Activity 2: Create Dashboard

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

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.

