

# A CRM APPLICATION FOR WHOLESALE RICE MILL

## Overview

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.

## Features and Functionality

### Reporting and Dashboards

- Daily Sales and Production Reports: Generates detailed reports on how much rice is produced & sold each day.
- Revenue Reports: Provides insights into daily revenue generated.
- Customer Analytics: Tracks popular rice types and most frequent buyers.
- Resource Allocation: Helps owners understand data for better resource allocation and future planning.

### Rollup Summary Field

- Purpose: Summarizes data from a child object to a parent object that shares a master-detail relationship.
- Functions: Can use COUNT, SUM, MIN, and MAX functions.

### Cross-Object Formula Field

- Purpose: References fields from another object in Salesforce.
- Function: Calculates the total amount payable by multiplying the number of rice units taken by the price per kg.

### Validation Rules

- Purpose: Ensures data integrity by validating user inputs.
- Is Blank Formula: Verifies if a field is blank and displays an error message if the rule returns a value of "True".

### Permission Sets

- Organization Wide Defaults (OWD): Defines the baseline level of access for the most restricted user.

- Roles and Access:
  - Owner: Can view records of employers and workers.
  - Employer: Can view records of workers.

## 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.

### Activity 1: Creating a Developer Account

To start using Salesforce, the first step is to create a developer org. Follow the steps below to create your Salesforce Developer Account:

#### Go to the Signup Page

- Navigate to the Salesforce Developer Signup page: [Salesforce Developer Signup](#)

#### Fill Out the Signup Form

- First Name :Maram
- Last Name : Gayathri
- Email : [gaya3maram66@gmail.com](mailto:gaya3maram66@gmail.com)
- Role : Developer
- Company : student
- Country : India
- state/province:Andhra Pradesh
- Postal Code : 521185
- Username : [maramgayathri@student.com](mailto:maramgayathri@student.com)

#### Submit the Form

- After filling in the details, click on the "Sign me up" button.

You have successfully created a Salesforce Developer Account. You will receive a confirmation email with further instructions to complete the setup

Sign up for your Salesforce Developer Edition

A Salesforce Platform environment for free.

Complete the form to get access to the Salesforce Developer Edition.

First Name\* Maram

Last Name\* Gayathri

Email\* gaya3maram66@gmail.com

Role\* Developer

Company\* student

Country/Region\* India

State/Province\* Andhra Pradesh

Postal Code\* 521185

Username\* maramgayathri@student.com

Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)

I agree to the [Main Services Agreement – Developer Services](#) and [Salesforce Program Agreement](#).

Yes, I would like to receive marketing communications regarding Salesforce products, services, and events. I can unsubscribe at any time.

By registering, you confirm that you agree to the processing of your personal data by Salesforce as described in the [Privacy Statement](#).

**Sign me Up**

Already have a Salesforce Developer Environment? [Activate Windows](#)  
Go to Settings to activate Windows.

[Log in](#)

## Activity 2: Account Activation

After creating your Salesforce Developer Account, you need to activate it. Follow these steps to activate your account:

### Check Your Email

- Go to the inbox of the email address you used while signing up. The verification email may take 5-10 minutes to arrive.

### Verify Your Account

- Open the email from Salesforce and click on the "Verify Account" link.

- On the verification page, create a password for your account.
  - Answer a security question for account recovery.
  - Click on "Change Password"

A new verification method was added to your Salesforce account

Inbox x

 noreply@salesforce.com <noreply@salesforce.com> Wed 1 Jan, 11:27 (1 day ago)    

to me ▾

The following identity verification method was recently added to your [maramgayathri@student.com](#) account:

Use verification codes from texts to +91 7659844896

If you didn't add this verification method, contact your Salesforce admin immediately to prevent unauthorized access to your account.

Activate Windows  
Go to Settings to activate Windows

# Milestone 2 - Object

## What Is an Object?

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

## Types of Salesforce Objects

Salesforce objects are of two types:

- Standard Objects: Standard objects are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
  - Custom Objects: Custom objects 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.

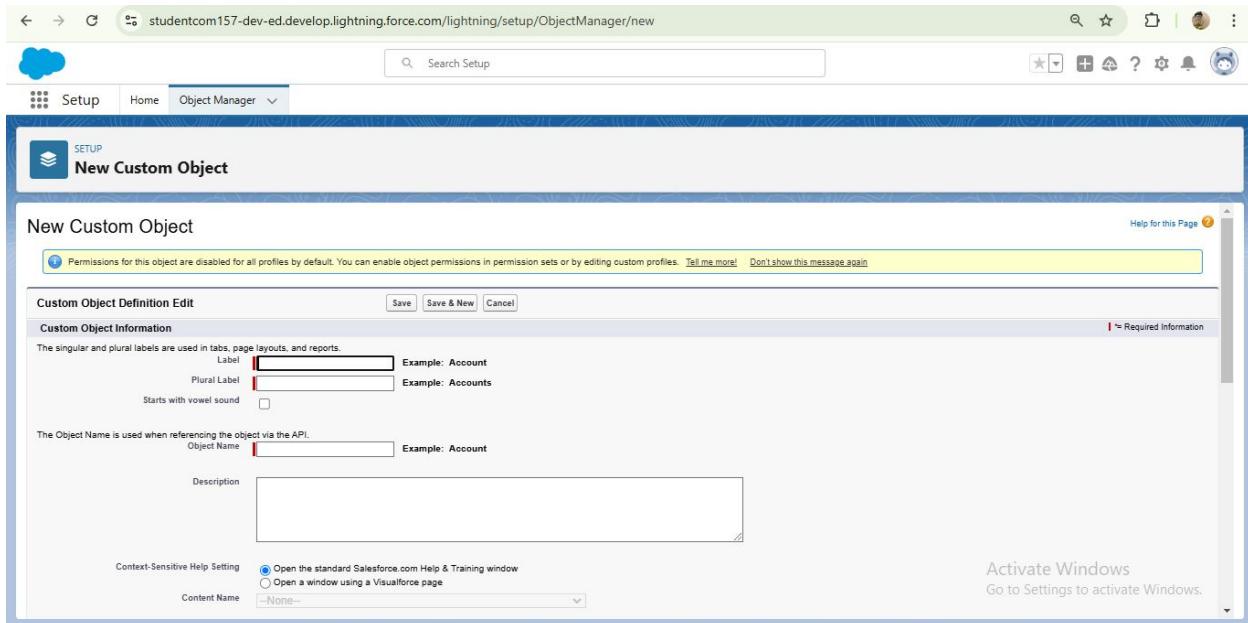
## To Navigate to Setup Page:

- Click on the gear icon
  - Click on Setup

## To Create an Object:

- From the setup page, click on Object Manager
  - Click on Create
  - Click on Custom Object
  - On the Custom Object defining page:

- Enter the Label Name and Plural Label Name
- Click on Allow Reports
- Click on Allow Search
- Click on Save



## **Activity 1: Create Supplier Object**

To create a Supplier object in Salesforce, follow these steps:

### **Navigate to Setup Page:**

- Click on the gear icon.
- Click on Setup.

### **Create a Custom Object:**

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

### **Define the Custom Object:**

- Enter the Label Name : Supplier.
- Enter the Plural Label Name : Suppliers.
- Enter the Record Name Label and Format:
- Record Name: Supplier Name
- Data Type: Text

### **Set Additional Options:**

- Click on Allow Reports.
- Click on Track Field History.

- Click on Allow Search.

### Save the Custom Object:

- Click on Save.+

The screenshot shows the Salesforce Setup interface for the 'supplier' object. On the left, a sidebar lists various object configuration options like Fields & Relationships, Page Layouts, and Record Types. The main 'Details' tab is selected. In the center, the 'API Name' field contains 'supplier\_c'. Other fields include 'Custom' checked, 'Singular Label' as 'supplier', and 'Plural Label' also as 'supplier'. To the right, there are sections for 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' set to 'Deployed', and 'Help Settings' pointing to 'Standard salesforce.com Help Window'. At the bottom right, a message says 'Activate Windows' and 'Go to Settings to activate Windows.'

This screenshot shows the 'Edit Custom Object' dialog for the 'supplier' object. The 'Custom Object Information' section is visible, containing fields for 'Label' (supplier), 'Plural Label' (supplier), and 'Object Name' (supplier). A note at the top of this section cautions users about changing the name or label. Below this, there's a 'Description' text area and a 'Context-Sensitive Help Setting' section with a radio button for 'Open the standard Salesforce.com Help & Training window'. At the bottom, there's a 'Content Name' dropdown set to '-None-' and a link to 'Enter Record Name Label and Format'.

### Activity 2: Create Rice Mill Object

To create a Rice Mill object in Salesforce, follow these steps:

#### Navigate to Setup Page:

- Click on the gear icon.
- Click on Setup.

#### Create a Custom Object:

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

#### **Define the Custom Object:**

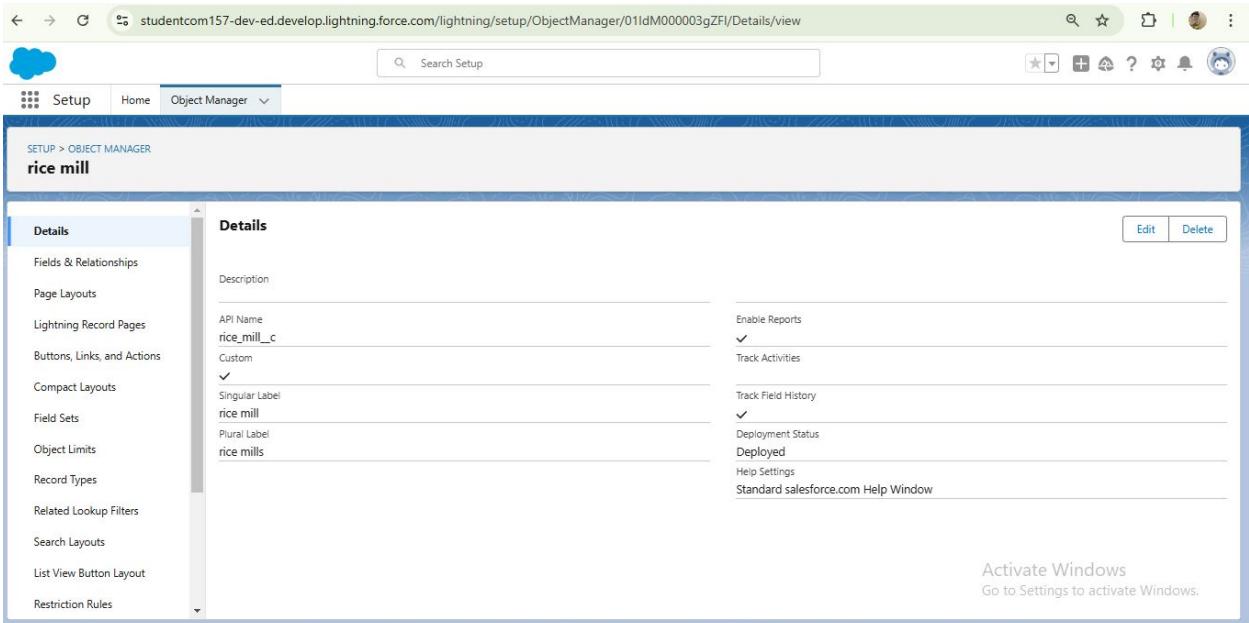
- Enter the Label Name: Rice Mill.
- Enter the Plural Label Name: Rice Mills.
- Enter the Record Name Label and Format:
- Record Name: Leave it blank.
- Data Type: Auto Number
- Display Format: rice-{000}
- Starting Number: 1

#### **Set Additional Options:**

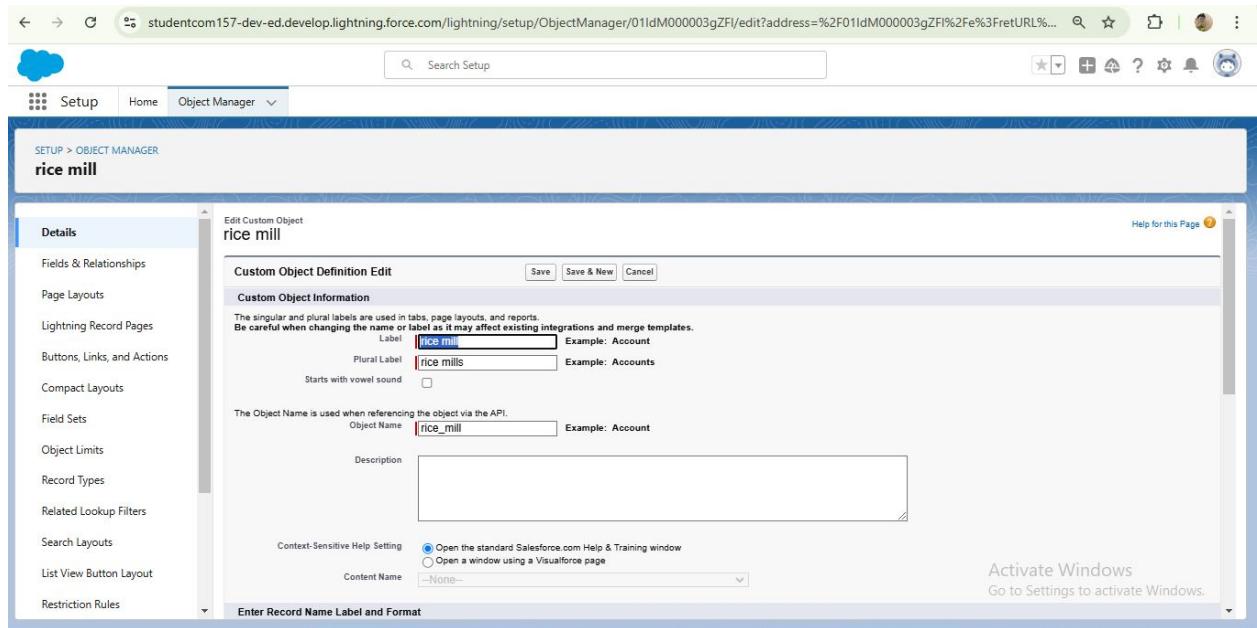
- Click on Allow Reports.
- Click on Track Field History.
- Click on Allow Search.

#### **Save the Custom Object:**

- Click on Save



The screenshot shows the Salesforce Object Manager interface. At the top, the URL is studentcom157-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lM000003gZFJ/Details/view. The page title is "rice mill". On the left, there's a sidebar with various tabs like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "Details" and contains fields for Description, API Name (rice\_mill\_\_c), Singular Label (rice mill), and Plural Label (rice mills). To the right, there are checkboxes for Enable Reports, Track Activities, and Track Field History, all of which are checked. Below these are Deployment Status (Deployed) and Help Settings (Standard salesforce.com Help Window). At the bottom right, there are "Edit" and "Delete" buttons, and a message: "Activate Windows Go to Settings to activate Windows."



### **Activity 3: Create Consumer Object**

To create a Consumer object in Salesforce, follow the same steps as mentioned in Activity 2 for creating the Rice Mill object. Use the following details for the Consumer object:

#### **Navigate to Setup Page:**

- Click on the gear icon.
- Click on Setup.

#### **Create a Custom Object:**

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

#### **Define the Custom Object:**

- Enter the Label Name: Consumer.
- Enter the Plural Label Name: Consumers.
- Enter the Record Name Label and Format:
  - Record Name: Leave it blank.
  - Data Type: Auto Number
  - Display Format: consumers-{000}
  - Starting Number: 1

#### **Set Additional Options:**

- Click on Allow Reports.
- Click on Track Field History.
- Click on Allow Search.

## Save the Custom Object:

- Click on Save.

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options like Fields & Relationships, Page Layouts, and Record Types. The main pane displays the 'Details' tab for the 'consumer' object. The API Name is set to 'consumer\_\_c'. The 'Custom' checkbox is checked. Singular Label is 'consumer' and Plural Label is 'consumers'. Other settings include Enable Reports (checked), Track Activities, Track Field History (checked), Deployment Status (Deployed), and Help Settings. A note at the bottom right says 'Activate Windows'.

- 

The screenshot shows the 'Edit Custom Object consumer' screen. It has tabs for 'Custom Object Information' and 'Custom Object Definition Edit'. In 'Custom Object Information', the label is 'consumer' and the plural label is 'consumers'. In 'Custom Object Definition Edit', the object name is 'consumer'. There are checkboxes for 'Starts with vowel sound' and 'Context-Sensitive Help Setting' (with options for standard help or a Visualforce page). A note at the bottom right says 'Activate Windows'.

- 

## Activity 4: Create Rice Details Object

To create a Rice Details object in Salesforce, follow these steps:

### Navigation:

- Click on the gear icon.
- Click on Setup.

### Create a Custom Object:

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

### Define the Custom Object:

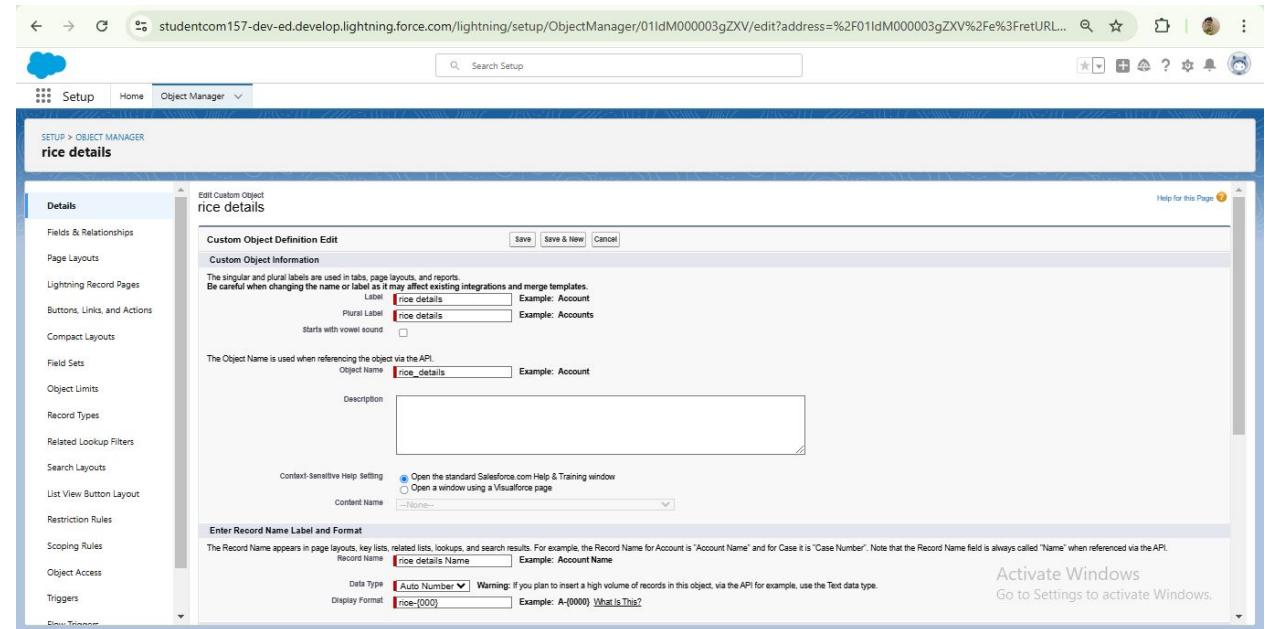
- Enter the Label Name: Rice Details.
- Enter the Plural Label Name: Rice Details.
- Enter the Record Name Label and Format:
- Record Name: Leave it blank.
- Data Type: Auto Number
- Display Format: rice-{000}
- Starting Number: 1

### Set Additional Options:

- Click on Allow Reports.
- Click on Track Field History.
- Click on Allow Search.

### Save the Custom Object:

- Click on Save.



## Milestone 3 - Tabs

### What is a Tab?

A tab is a user interface element used to build records for objects and view the records within those objects.

**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 tabs such as accounts, contacts, and opportunities.

### **Activity 1: Creating a Custom Tab (Supplier)**

To create a Tab for the Supplier object, follow these steps:

#### **Navigate to Setup Page:**

- Go to the setup page.
- Type "Tabs" in the Quick Find bar.
- Click on Tabs.

#### **Create a New Custom Object Tab:**

- Click on New under the Custom Object Tabs section.

#### **Select Object and Tab Style:**

- Select the Supplier object.
- Choose the tab style.
- Click on Next.

#### **Add to Profiles Page:**

- Keep it as default.
- Click on Next

#### **Add to Custom App:**

- Uncheck the Include Tab checkbox.

#### **Append Tab to Users' Existing Personal Customizations:**

- Ensure that the Append tab to users' existing personal customizations option is checked.

#### **Save the Custom Tab:**

- Click on Save.

The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page open. The URL is <https://studentcom157-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01rdM00000QT8Cw%3Fsetupid%3DCustomTabs>. The page title is 'SETUP Tabs'. On the left, there's a sidebar with 'User Interface' expanded, showing 'Rename Tabs and Labels' and 'Tabs' selected. A search bar at the top says 'Search Setup'.

**Custom Object Tab**  
**supplier**

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

Custom Tab Definition Detail	
Tab Label	supplier
Object	supplier
Description	
Created By	Maram Gayathri, 01/01/2025, 11:52 am
Modified By	Maram Gayathri, 01/01/2025, 11:52 am

Tab Style: Box

Help for this Page ?

Activate Windows  
Go to Settings to activate Windows.

## Activity 2: Creating Remaining Tabs

To create tabs for the remaining objects (Rice Mill, Consumer, Rice Details), follow the same steps as mentioned in Activity 1

The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page open. The URL is <https://studentcom157-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01rdM00000QT7IY%3Fsetupid%3DCustomTabs>. The page title is 'SETUP Tabs'. The sidebar on the left shows 'User Interface' expanded, with 'Rename Tabs and Labels' and 'Tabs' selected. A search bar at the top says 'Search Setup'.

**Custom Object Tab**  
**rice mills**

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

Custom Tab Definition Detail	
Tab Label	rice mills
Object	rice mill
Description	
Created By	Maram Gayathri, 01/01/2025, 11:55 am
Modified By	Maram Gayathri, 01/01/2025, 11:55 am

Tab Style: Box

Help for this Page ?

Activate Windows  
Go to Settings to activate Windows.

The image contains two screenshots of the Salesforce Setup interface, specifically the 'Tabs' section under 'User Interface'.

**Screenshot 1: Custom Object Tab - consumers**

- Custom Tab Definition Detail:**

Tab Label	consumers	Edit	Delete
Object	consumer	Tab Style: Box	
Description		Splash Page Custom Link	
Created By	Maram_Gayathri, 01/01/2025, 11:55 am	Modified By	Maram_Gayathri, 01/01/2025, 11:55 am
- Information:** Didn't find what you're looking for? Try using Global Search.
- Help:** Help for this Page ?
- Activation Message:** Activate Windows Go to Settings to activate Windows.

**Screenshot 2: Custom Object Tab - rice details**

- Custom Tab Definition Detail:**

Tab Label	rice details	Edit	Delete
Object	rice_details	Tab Style: Box	
Description		Splash Page Custom Link	
Created By	Maram_Gayathri, 01/01/2025, 11:56 am	Modified By	Maram_Gayathri, 01/01/2025, 11:56 am
- Information:** Didn't find what you're looking for? Try using Global Search.
- Help:** Help for this Page ?
- Activation Message:** Activate Windows Go to Settings to activate Windows.

## 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 organization can work more efficiently by easily switching between apps.

### Activity 1: Create a Lightning App

To create a Lightning app page, follow these steps:

**Navigate to App Manager:**

- Go to the setup page.
- Search for “App Manager” in the Quick Find bar.
- Select “App Manager”.
- Click on New Lightning App.

**Fill in App Details:**

- Enter the app name as MY RICE.
- Click Next.

**App Options Page:**

- Keep the settings as default.
- Click Next.

**Utility Items Page:**

- Keep the settings as default.
- Click Next.

**Upload a Photo:**

- Upload a photo that is related to your app.

**Add Navigation Items:**

- Select the items (Supplier, Rice Mill, Consumer, Rice Details) from the search bar.
- Move the selected items using the arrow button.
- Click Next.

**Add User Profiles:**

- Search for profiles (System Administrator) in the search bar.
- Click on the arrow button to add the profile.
- Click Save & Finish.

The screenshot shows two related pages from the Salesforce setup.

**Top Page: Lightning Experience App Manager**

- Header:** studentcom157-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home
- Left Sidebar:** Setup, Home, Object Manager
- Search Bar:** Search Setup
- Content:** A table titled "Lightning Experience App Manager" showing 22 items. The columns are: App Name ↑, Developer Name ↓, Description ↓, Last Modified ..., Ap... ↓, Vi... ↓. The table includes rows for various built-in apps like "Lightning Usage App", "Marketing CRM Classic", and "Salesforce Chatter". One row, "MY RICE", is selected and highlighted.
- Buttons:** New Lightning App, New Connected App

**Bottom Page: Lightning App Builder**

- Header:** studentcom157-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02udM000009p2dhQAA&retUrl=https%3A%2F%2Fstudentcom157-dev-e...
- Left Sidebar:** Lightning App Builder, App Settings, Pages ▾, MY RICE, ? Help
- Content:**
  - App Settings:** App Details & Branding
  - App Details & Branding:** App Details (fields: \*App Name: MY RICE, \*Developer Name: MY\_RICE, Description: Enter a description...) and App Branding (Image: a small logo placeholder, Primary Color Hex Value: #0070D2).
  - Org Theme Options:** Use the app's image and color instead of the org's custom theme (checkbox)
  - App Launcher Preview:** Shows a preview of the app icon and name.
  - Activation Message:** Activate Windows. Go to Settings to activate Windows.

## Milestone 5: Fields

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

### Types of Fields

1. Standard Fields
2. Custom Fields

## **Standard Fields**

As the name suggests, 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 unless it is a non-required standard field. Otherwise, users have the option to delete them freely at any point from the application. Some common fields you will find in every Salesforce application include:

- 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 their requirements. Each organization or company can use them if necessary. It means you do not always need to include them in the records, unlike Standard Fields. Hence, the final decision depends on the user, who can add or remove Custom Fields as needed.

### **Activity 1: Creating the Number Field in RiceDetails Object**

To create a number field in the Rice Details object, follow these steps:

#### **Navigate to Object Manager:**

- Go to the setup page.
- Click on Object Manager.

#### **Edit the Rice Details Object:**

- From the dropdown, click Edit for the Rice Details object.

#### **Create a New Field:**

- Click on Fields & Relationships.
- Click on New.

#### **Select Data Type:**

- Select Number as the data type.
- Click Next.

#### **Define Field Properties:**

- Enter the Field Label as Rice Distributed.
- Set the length to 5.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "rice details". On the left, a sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Fields & Relationships. The "Fields & Relationships" option is selected. The main content area displays the "Custom Field Definition Detail" for the "rice distributed" field. The field information table includes columns for Field Label (rice distributed), Field Name (rice\_distributed), API Name (rice\_distributed\_c), Object Name (rice\_details), and Data Type (Number). Other visible fields include Help Text, Description, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The field was created by Maram\_Gayathri on 01/01/2025 at 12:06 pm, and last modified by the same user on the same date and time. A note at the bottom right says "Activate Windows" and "Go to Settings to activate Windows".

## 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: Rice Details with Supplier & Rice Mill**

#### **To create a Junction Object:**

##### **Navigate to Object Manager:**

- Go to the setup page.
- Click on Object Manager.
- From the dropdown, click Edit for the Rice Details object.

##### **Create a New Field:**

- Click on Fields & Relationships.
- Click on New.

##### **Select Data Type:**

- Select Master-Detail Relationship as the data type.
- Click Next.

##### **Relate to Supplier Object:**

- Select the related object Supplier.
- Click Next.

##### **Define Field Properties:**

- Give the Field Label as Supplier Name.
- Click Next.
- Click Next again.

- Click Save & New.

### Repeat Steps for Rice Mill Object:

- Follow the same steps from 1 to 3.
- Select the related object Rice Mill.
- Click Next.

### Define Field Properties for Rice Mill:

- Give the Field Label as Rice Mill 1 (one).
- Click Next.
- Click Next again.
- Click Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "rice details". On the left, a sidebar lists various customization options: Details, Fields & Relationships (selected), 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, and Restriction Rules. The main content area displays the "rice details Custom Field supplier Name". It shows the field's properties: Field Label (supplier Name), Field Name (supplier), API Name (supplier\_c), Description (Help Text), Data Owner (Field Usage), Data Sensitivity Level (Compliance Categorization), and Created By (Maram Gavath). The Data Type is Master-Detail, and the Object Name is rice\_details. The "Master-Detail Options" section shows the Related To field set to supplier, the Related List Label to rice details, and the Sharing Setting to Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records. A checkbox for Reparentable Master Detail is checked. At the bottom right, there is a message: "Activate Windows Go to Settings to activate Windows." A "Validation Rules" button is also present.

The screenshot shows the Salesforce Object Manager interface. The left sidebar has a 'Fields & Relationships' section selected. The main area displays a custom field named 'rice mill 1(one)'. The field information includes:

Field Label	rice mill 1(one)
Field Name	rice_mill_1_one
API Name	rice_mill_1_one_c
Description	(Help Text, Data Owner, Field Usage)
Data Sensitivity Level	(Compliance Categorization)

Details about the field:

- Object Name: rice\_details
- Data Type: Master-Detail

Activity Bar at the bottom right:

- Activate Windows
- Go to settings to activate Windows.

### **Activity 3: Creating a Master-Detail Relationship**

A 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:**

###### **Navigate to Object Manager:**

- Go to the setup page.
- Click on Object Manager.
- From the dropdown, click Edit for the Consumer object.

###### **Create a New Field:**

- Click on Fields & Relationships.
- Click on New.

###### **Select Data Type:**

- Select Master-Detail Relationship as the data type.
- Click Next.

###### **Relate to Rice Mill Object:**

- Select the related object Rice Mill.
- Click Next

###### **Define Field Properties:**

- Give the Field Label as Rice Mill Name.
- Click Next. , Click Next again.

- Click Save.

The screenshot shows the Salesforce Setup page with the 'Object Manager' tab selected. Under the 'consumer' object, a new custom field 'rice mill name' is being defined. The 'Fields & Relationships' section is active. The field details are as follows:

- Field Label:** rice mill name
- Field Name:** rice\_mill\_name
- API Name:** rice\_mill\_name\_c
- Description:** Help Text
- Data Owner:** Data Owner
- Field Usage:** Data Sensitivity Level
- Object Name:** consumer
- Data Type:** Master-Detail
- Created By:** Maram Gayathri, 01/01/2025, 12:19 pm
- Modified By:** Maram Gayathri, 01/01/2025, 12:19 pm

## **Activity 4: Creating the Roll-up Summary**

A roll-up summary field is a field that summarizes data from a child object to a parent object that shares a master- detail relationship. Roll-up summary fields can use the COUNT, SUM, MIN, and MAX functions. For example, you could use a roll-up 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**

**To create a Roll-up Summary field:**

#### **Navigate to Object Manager:**

- Go to the setup page.
- Click on Object Manager.
- Type the object name Supplier in the search bar.
- Click on the object.

#### **Create a New Field:**

- Click on Fields & Relationships.
- Click on New.

#### **Select Data Type:**

- Select the data type as Roll-up Summary.
- Click Next.

#### **Define Field Properties for Supplier:**

- Give the Field Label as Sum of Rice Distributed. The Field Name will be auto-generated.

- Click Next.

### Configure Roll-up Summary for Supplier:

- Select the summarized object as Rice Details.
- Select the roll-up type as SUM.
- Select the field to aggregate as Rice Distributed.
- Click Next. , Click Next again.
- Click Save.

studentcom157-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000003gYht/FieldsAndRelationships/00NdM00000B8YWD/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
supplier

Details Fields & Relationships

Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layouts Restriction Rules

Custom Field  
**sum of rice distributed**  
Back to supplier

Custom Field Definition Detail

Field Information

Field Label	sum of rice distributed
Field Name	sum_of_rice_distributed
API Name	sum_of_rice_distributed_c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Maram_Gayathri, 01/01/2025, 12:22 pm
Modified By	Maram_Gayathri, 01/01/2025, 12:22 pm

Object Name: supplier

Roll-Up Summary Options

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

Summary Type: SUM

Activate Windows  
Go to Settings to activate Windows.

### Repeat Steps for Rice Mill Object:

- Follow the same steps from 1 to 3 for the Rice Mill object.
- Give the Field Label as Rice Distributed to Shops. The Field Name will be auto-generated.
- Click Next.

### Configure Roll-up Summary for Rice Mill:

- Select the summarized object as Rice Details.
- Select the roll-up type as SUM.
- Select the field to aggregate as Rice Distributed.
- Click Next.
- Click Next again.
- Click Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "rice mill". On the left, a sidebar lists various customization options under "Fields & Relationships". The central panel displays the "rice mill Custom Field" named "rice distributed to shops". The "Field Information" section shows details like Field Label ("rice distributed to shops"), Field Name ("rice\_distributed\_to\_shops"), API Name ("rice\_distributed\_to\_shops\_\_c"), and Description ("rice distributed to shops"). The "Object Name" is listed as "rice mill". The "Roll-Up Summary Options" section shows the summarized object as "rice\_details" and the field to aggregate as "rice\_details:rice\_distributed". A note at the bottom right says "Activate Windows" and "Go to Settings to activate Windows".

## Additional Steps for Consumer Object

### Create the Field:

- Create the field Rice Taken by Shops in Kgs using the number datatype in the Consumer object.

### Repeat Steps for Rice Mill Object:

- Follow the same steps from 1 to 3 for the Rice Mill object.
- Give the Field Label as Rice Taken. The Field Name will be auto-generated.
- Click Next.

### Configure Roll-up Summary for Rice Mill (Consumer):

- Select the summarized object as Consumer.
- Select the roll-up type as SUM.
- Select the field to aggregate as Rice Taken in Shops.
- Click Next .
- Click Next again.
- Click Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. A search bar is at the top right. The main area shows the 'rice mill' object details. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The central panel displays the 'rice taken' custom field definition. It shows the field's label ('rice taken'), name ('rice\_taken'), and API name ('rice\_taken\_\_c'). The field is of type 'Number'. It has a roll-up summary option for 'consumer' with a formula of 'consumer.rice\_taken\_by\_shoes\_in\_kgs'. The field was created by 'Maram Gayathri' on 01/01/2025, 12:28 pm, and last modified by her on the same date. The object name is 'rice mill'.

## Activity 5: Creating Fields in Objects

Creating the number field in the Rice Details object.

### **Navigate to Setup:**

- Go to the setup page.
- Click on "Object Manager" from the top navigation menu.

### **Edit Rice Details Object:**

- In Object Manager, find and select "Rice Details" from the list of objects.
- Click on "Fields & Relationships."

### **Create New Field:**

- Click on the "New" button to create a new field.

### **Select Data Type:**

- Choose "Number" as the data type for the field.
- Click "Next."

### **Define Field Properties:**

- Enter "Supplier Name" as the Field Label.
- Set the length to "5" (assuming this refers to the precision or size of the number).
- Field Name will be automatically populated based on the label.

### **Proceed with Creation:**

- Click "Next" to proceed through any additional screens.
- Review the field details and click "Save" to create the new field

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'rice details'. On the left, a sidebar lists various setup categories like 'Details', 'Fields & Relationships', and 'Page Layouts'. The central panel displays a 'Custom Field Definition Detail' for a field named 'supplier Name'. The field information table includes columns for 'Field Label' (supplier Name), 'Object Name' (rice\_details), 'Field Name' (supplier), 'Data Type' (Master-Detail), 'API Name' (supplier\_\_c), 'Description', 'Help Text', 'Data Owner', 'Field Usage', 'Data Sensitivity Level', 'Compliance Categorization', 'Created By' (Maram\_Gavath), 'Modified By' (Maram\_Gavath), and 'Modified' (01/01/2025, 12:10 pm). Below this is a 'Master-Detail Options' section with fields for 'Related To' (supplier), 'Child Relationship Name' (rice\_details), 'Sharing Setting' (Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.), and 'Reparentable Master Detail' (unchecked). A 'Lookup Filter' section is also present. At the bottom right, there is a message: 'Activate Windows Go to Settings to activate Windows.'

## **Activity 6: Creating Fields in Rice Mill Objects**

### **Navigate to Setup:**

- Go to the setup page.
- Click on "Object Manager" from the top navigation menu.

### **Edit Rice Mills Object:**

- In Object Manager, find and select "Rice Mills" from the list of objects.
- Click on "Fields & Relationships."

### **Create New Field:**

- Click on the "New" button to create a new field.

### **Select Data Type:**

- Choose "Number" as the data type for the field.
- Click "Next."
- Given the Field Label as "Rice Price/kg" and length as "5".

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "rice mill". On the left, a sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The central panel displays the "Custom Field Definition Detail" for the "rice price/kg" field. Key details shown include:

- Field Information:** Field Label: rice price/kg, Field Name: rice\_price\_kg, API Name: rice\_price\_kg\_c.
- General Options:** Required (unchecked), Unique (unchecked), External ID (unchecked), AI Prediction (unchecked).
- Object Details:** Object Name: rice\_mill, Data Type: Number.
- Timestamps:** Created By: Maram\_Gavathri, 01/01/2025, 12:35 pm; Modified By: Maram\_Gavathri, 01/01/2025, 12:35 pm.

A message at the bottom right of the panel says "Activate Windows" and "Go to Settings to activate Windows."

## Activity 7: Creating Fields in Consumer Objects

### **Navigate to Setup:**

- Go to the setup page.
- Click on "Object Manager" from the top navigation menu.

### **Edit Consumer Object:**

- In Object Manager, find and select "Consumer" from the list of objects.
- Click on "Fields & Relationships."

### **Create New Field For First Name:**

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "SETUP > OBJECT MANAGER consumer". On the left, a sidebar lists various setup options under "Fields & Relationships". The right pane displays the "Custom Field Definition Detail" for a field named "First name". The field information table includes:

Field Label	First name	Object Name	consumer
Field Name	First_name	Data Type	Text
API Name	First_name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Maram Gayathri, 01/01/2025, 12:38 pm	Modified By	Maram Gayathri, 01/01/2025, 12:38 pm
			Activate Windows Go to Settings to activate Windows.

## Create New Field For Last Name:

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "SETUP > OBJECT MANAGER consumer". On the left, a sidebar lists various setup options under "Fields & Relationships". The right pane displays the "Custom Field Definition Detail" for a field named "Last name". The field information table includes:

Field Label	Last name	Object Name	consumer
Field Name	Last_name	Data Type	Text
API Name	Last_name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Maram Gayathri, 01/01/2025, 12:39 pm	Modified By	Maram Gayathri, 01/01/2025, 12:39 pm
			Activate Windows Go to Settings to activate Windows.

## Create New Field For Email :

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'SETUP > OBJECT MANAGER' and shows the 'consumer' object selected. The main content area is titled 'consumer Custom Field email'. The 'Field Information' section displays the following details:

Field Label	email	Object Name	consumer
Field Name	email	Data Type	Email
API Name	email_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Below the table, it shows 'Created By' Maram Gayathri, 01/01/2025, 12:41 pm and 'Modified By' Maram Gayathri, 01/01/2025, 12:41 pm. A note at the bottom right says 'Activate Windows' and 'Go to Settings to activate Windows.'

## Create New Field For Rice Taken By Shops:

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'SETUP > OBJECT MANAGER' and shows the 'consumer' object selected. The main content area is titled 'consumer Custom Field Rice taken by shops'. The 'Field Information' section displays the following details:

Field Label	Rice taken by shops	Object Name	consumer
Field Name	Rice_taken_by_shops	Data Type	Number
API Name	Rice_taken_by_shops_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Below the table, it shows 'Created By' Maram Gayathri, 01/01/2025, 12:42 pm and 'Modified By' Maram Gayathri, 01/01/2025, 12:42 pm. A note at the bottom right says 'Activate Windows' and 'Go to Settings to activate Windows.'

## Create New Field For Rice Type:

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a back arrow, forward arrow, search bar, and various icons. The main header says "SETUP > OBJECT MANAGER consumer". On the left, a sidebar lists options like Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area displays a "Custom Field Definition Detail" for a field named "Rice type". The field information table includes:

Field Label	Field Name	Object Name
Rice type	Rice_type	consumer
	API Name	Data Type
	Rice_type__c	Picklist

Other details shown include Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By (Maram\_Gayathri, 01/01/2025, 12:44 pm), Modified By (Maram\_Gayathri, 01/01/2025, 12:44 pm), and a note to "Activate Windows" with a link to go to settings.

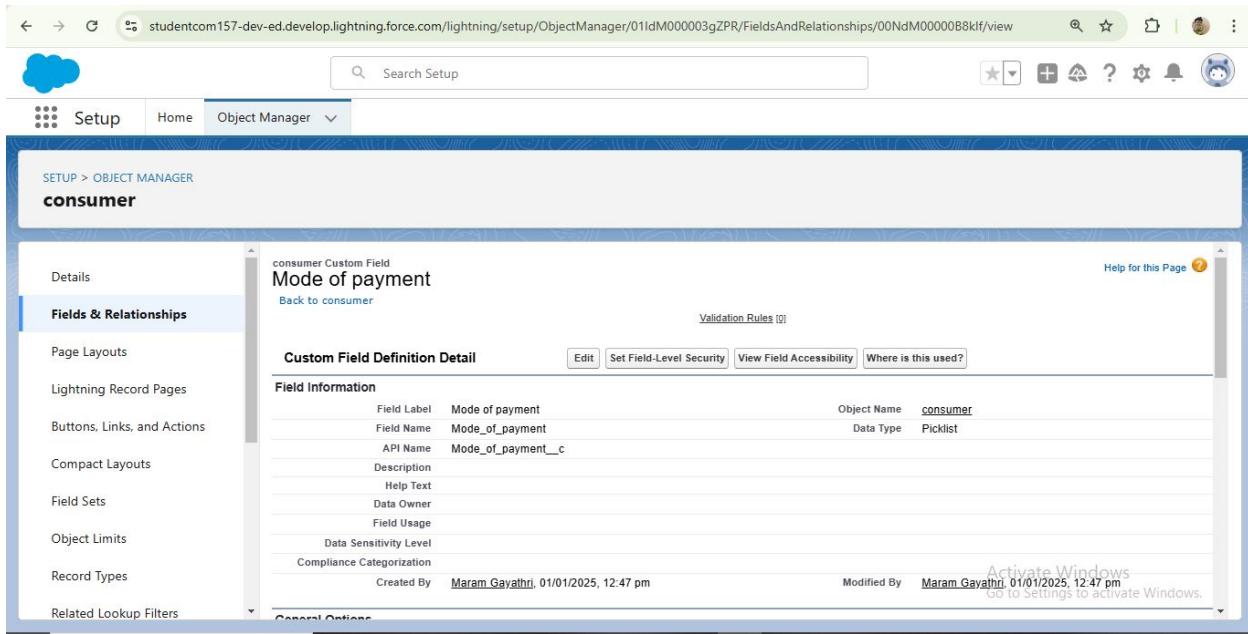
## Create New Field For Phone Number:

This screenshot shows the continuation of creating a new field. The setup path is "SETUP > OBJECT MANAGER consumer". The "Fields & Relationships" section is selected in the sidebar. The main content shows a "Custom Field Definition Detail" for a field named "Phone number". The field information table includes:

Field Label	Field Name	Object Name
Phone number	Phone_number	consumer
	API Name	Data Type
	Phone_number__c	Phone

Other details shown include Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By (Maram\_Gayathri, 01/01/2025, 12:40 pm), Modified By (Maram\_Gayathri, 01/01/2025, 12:40 pm), and a note to "Activate Windows" with a link to go to settings.

## Create New Field For Mode Of Payment:



### **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.

- Go to setup → click on Object Manager → type object name (consumer) in the search bar Click on Fields &Relationships → click on New.
- Select Data type as “Formula” and click Next.
- Give Field Label and Field Name as “Amount Paid” and select formula return type as “Number” Formula : rice\_taken\_by\_shops\_\_c \*  
rice\_mill\_name\_\_r.rice\_price\_kg\_\_c

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "SETUP > OBJECT MANAGER consumer". On the left, a sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Fields & Relationships. The "Fields & Relationships" option is selected. The main content area displays a "Custom Field Definition Detail" for a field named "Amount Paid" on the "consumer" object. The field information table includes columns for Field Label, Field Name, API Name, Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. It also shows the object name as "consumer", created by "Maram Gayathri" on 01/01/2025 at 1:09 pm, and modified by the same user on the same date and time. A note at the bottom right says "Activate Windows Go to Settings to activate Windows."

- Give Field Label and Field Name as “Amount Paid” and select formula return type as “Number” and Next.
- Go to setup → click on Object Manager → type object name (consumer) in the search bar
- Click on Fields & Relationships → click on New.
- Select Data type as “Formula”, click Next.
- Give Field Label and Field Name as “Consumer Name” and select formula return type as “TEXT”, click Next.
- Insert field formula should be: First\_Name\_\_c + '' + Last\_Name\_\_c, Check For syntax

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "SETUP > OBJECT MANAGER consumer". On the left, a sidebar lists various customization options under "Fields & Relationships". The central panel displays the "Custom Field Definition Detail" for the "Consumer Name" field. Key details shown include:

- Field Label:** Consumer Name
- Field Name:** Consumer\_Name
- API Name:** Consumer\_Name\_\_c
- Description:** Help Text
- Data Owner:** Field Usage
- Data Sensitivity Level:** Data
- Compliance Categorization:** None
- Created By:** Maram\_Gayathri, 01/01/2025, 1:11 pm
- Modified By:** Maram\_Gayathri, 01/01/2025, 1:11 pm

A watermark for "Activate Windows" is visible in the bottom right corner.

### **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**

- Go to the setup page → click on Object Manager → from the dropdown click edit for the consumer object.
- Click on Validation Rules → click New.
- Enter the Rule Name as “Phonenumberoremailblankrule”.
- Enter the Description as “Phone number and email should not be blank”.
- Enter the formula as: OR( ISBLANK( phone\_number\_\_c ), ISBLANK( email\_\_c ) ).
- Check the syntax.
- Under the Error Message , Write “Please fill in your Phone Number”.
- Save Validation rule .

The screenshot shows the Salesforce Setup Object Manager interface. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled "consumer Validation Rule". It displays the validation rule details:

Rule Name	Phonenumberoremailblankrule	Active	✓
Error Condition Formula	OR( ISBLANK( Phone_number__c ), ISBLANK( email__c ) )	Error Message	please fill in your phone number
Description	phone number and email number should not be blank	Error Location	Top of Page
Created By	Maram_Gayathri, 01/01/2025, 1:15 pm	Modified By	Maram_Gayathri, 01/01/2025, 1:15 pm

At the bottom right, there is a message: "Activate Windows Go to Settings to activate Windows."

## Overall Supplier Fields

The screenshot shows the Salesforce Setup Object Manager interface. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled "Fields & Relationships" for the "supplier" object. It shows a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)	✓	
sum of rice distributed	sum_of_rice_distributed__c	Roll-Up Summary (SUM rice details)		
supplier Name	Name	Text(80)	✓	

At the bottom right, there is a message: "Activate Windows Go to Settings to activate Windows."

## Overall Rice Mills Fields

studentcom157-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000003gZFI/FieldsAndRelationships/view

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
rice distributed to shops	rice_distributed_to_shops__c	Roll-Up Summary (SUM rice details)		▼
rice mill Name	Name	Auto Number		✓
rice price/kg	rice_price_kg__c	Number(5, 0)		▼
rice taken	rice_taken__c	Roll-Up Summary (SUM consumer)	Activate Windows Go to Settings to activate Windows.	▼

## Overall Rice Detail Field

studentcom157-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000003gZXV/FieldsAndRelationships/view

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
rice details Name	Name	Auto Number		✓
rice distributed	rice_distributed__c	Number(5, 0)		▼
rice mill 1(one)	rice_mill_1_one__c	Master-Detail(rice mill)		✓
supplier Name	supplier__c	Master-Detail(supplier)		✓

## Overall Consumer Fields

**Fields & Relationships**  
14 Items, Sorted by Field Label

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(30)		
Last Modified By	LastModifiedById	Lookup(User)		

**Fields & Relationships**  
14 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Last modified by	Last_modified_by	LOOKUP(USER)		
Last name	Last_name__c	Text(50)		
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		

## 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

- Go to Setup → Click on Object Manager → Search for the object (consumer) → From the dropdown select the object and click on it.
- Click on Page Layout → Click on New.
- Select the existing page layout, and give the page layout name as “consumer layout”, and click Save.
- Drag and drop the section field to Consumer Details and create the section. Enter the section name as “Personal Details”, → click Ok.
- Now drag the fields to this section that are mentioned: First Name , Last Name , Consumer Name , etc.
- Follow the same process for another two sections as shown above. They are:
  - Section: "Rice Details" Fields: Rice Taken by Shop, Rice Type
  - Section: "Receipt Details" Fields: Mode of Payment, Amount Paid
- Click Save.
- 

Section	Consumer Name	Last Modified By	rice mill name
Blank Space	Created By	Last name	Rice taken by shops
	email	Mode of payment	rice taken by sho...
consumer Name	First name	Phone number	Rice type

**Personal details**

First name	Sample Text
Last name	Sample Text
consumer Name	GEN-2004-001234
Phone number	1-415-555-1212
email	sarah.sample@company.com
rice mill name	Sample Text

**Receipt details**

Mode of payment	Sample Text
Amount Paid	894.72

**Information** (Header visible on edit only)  
rice taken by shops in kgs 99,406

## Milestone 7: Profiles

A profile is a group/collection of settings and permissions that define what a user can do in Salesforce. Profiles control object permissions, field permissions, user permissions, tab settings, app settings, Apex class access, Visualforce page access, page layouts, record types, login hours, and 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 the following standard profiles:

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

## 2. Custom Profiles

Custom profiles are defined by us. They can be deleted if there are no users assigned with that particular profile.

## **Activity 1: Owner Profile**

### To create a new profile:

- Go to Setup → type "Profiles" in the quick find box → click on Profiles → clone the desired profile (Standard User) → enter profile name (Owner) → Save.
  - 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.
  - Give access and save it.

The screenshot shows the Salesforce Setup interface for Enhanced Profiles. The top navigation bar includes links for Home and Object Manager. On the left, a sidebar shows a search bar for 'profiles' and a 'Users' section with a 'Profiles' link. A message says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Profiles' and contains sections for 'Custom Object Permissions' and 'Platform Event Permissions'. Under 'Custom Object Permissions', there are tables for AppLogs, Books, Book Line Items, Book Orders, consumers, FlowPersonalConfigurations, FlowTableViewDefinitions, rice details, rice mills, supplier, and various Flow-related objects. Under 'Platform Event Permissions', there is a table for AppLogEvents. At the bottom, 'Session Settings' show a session timeout of '2 hours of inactivity'. A message at the bottom right encourages activating Windows.

## **Activity 2: Employer Profile**

### **To create a new profile:**

- Go to Setup → type "Profiles" in the quick find box → click on Profiles → clone the desired profile (Standard Platform User) → enter profile name (Employer) → Save.
- While still on the profile page, click Edit.
- Select the Custom App settings as default for the rice mill.
- 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. Click Save.

The screenshot shows the Salesforce Setup interface for creating a new profile. The top navigation bar includes links for Home, Object Manager, and a search bar. The main content area is titled 'Profiles' under the 'SETUP' tab. On the left, there's a sidebar with 'Users' and 'Profiles' selected. The main pane displays 'Custom Object Permissions' for the 'Employer' profile. It shows two tables of permissions for various objects like AppLogs, Books, Book Line Items, Book Orders, consumers, FlowPersonalConfigurations, FlowTableViewDefinitions, rice details, rice mills, and supplier. The 'consumers' object has 'Read' and 'Create' checked. The 'rice details' object has 'Edit' checked. The 'supplier' object has 'Edit' and 'Delete' checked. Below this, there are sections for 'Platform Event Permissions' (AppLogEvents) and 'Session Settings' (Session Times Out After: 2 hours of inactivity, Session Security Level Required at Login). At the bottom right, there's a note to 'Activate Windows' with a link to 'Go to Settings to activate Windows.'

## **Activity 3: Workers Profile**

### **To create a new profile:**

- Go to Setup → type "Profiles" in the quick find box → click on Profiles → clone the desired profile (Standard Platform User) → enter profile name (Workers ) → Save.
- While still on the profile page, click Edit.
- Select the Custom App settings as default for the rice mill.
- 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. Click Save.

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

- Header:** studentcom157-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edM000009Chwr
- Left Sidebar:** Includes a search bar ('Search Setup'), Home, Object Manager, and a search field ('Q profiles').
- Top Bar:** Includes a cloud icon, a search bar ('Search Setup'), and various setup icons.
- Page Title:** Profiles
- Content Area:**
  - Contact Point Emails:** A row of checkboxes for Read, Create, Edit, Delete, View All, and Modify All.
  - User External Credentials:** A row of checkboxes for Read, Create, Edit, Delete, View All, and Modify All.
  - Custom Object Permissions:** A grid of checkboxes for various objects like AppLogs, Books, Book Line Items, Book Orders, consumers, FlowPersonalConfigurations, FlowTableViewDefinitions, rice details, rice mills, and supplier. The 'consumers' row has checked boxes for Read and Create.
  - Platform Event Permissions:** A grid for AppLogEvents showing checkboxes for Read and Create.
  - Session Settings:** Shows 'Session Times Out After' set to '2 hours of inactivity' and 'Session Security Level Required at' set to 'Standard'.
  - Activate Windows:** A message: 'Go to Settings to activate Windows.'

## 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:

- Go to Quick Find → search for Roles → click on Set Up Roles.
- Click on Expand All and click on Add Role under whom this role works.
- Give Label as "Owner" and Role Name gets auto-populated. Then click on Save.
- Click and save it.

### Activity 2: Creating Employer Roles

#### Creating Another Two Roles Under Manager:

- Go to Quick Find → search for Roles → click on Set Up Roles.
- Click the plus on CEO role, and click Add Role under Owner.
- Give Label as "Employer" and Role Name gets auto-populated. Then click on

Save.

- Repeat the same steps for another role.
- Click the plus on CEO role, and click the plus on Owner, and click Add Role under Employer.
- Give Label as "Worker" and Role Name gets auto-populated. Then click on Save.

The screenshot shows the Salesforce Setup Roles page. The left sidebar has sections like Users (Roles is selected), 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 Hierarchy'. The hierarchy is as follows:

- student
  - Add Role
  - CEO [Edit](#) [Del](#) [Assign](#)
    - Add Role
    - CFO [Edit](#) [Del](#) [Assign](#)
      - Add Role
    - COO [Edit](#) [Del](#) [Assign](#)
      - Add Role
    - owner [Edit](#) [Del](#) [Assign](#)
      - Add Role
      - employer [Edit](#) [Del](#) [Assign](#)
        - Add Role
        - worker [Edit](#) [Del](#) [Assign](#)
          - Add Role
    - SVP\_Customer Service & Support [Edit](#) [Del](#) [Assign](#)
      - Add Role

## 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

- Go to Setup → type "Users" in the quick find box → select Users → click New User.
- Fill in the fields:
  - First Name: Vicky
  - Last Name: Y
  - Alias: Vy

- Email ID: [gaya3maram66@gmail.com](mailto:gaya3maram66@gmail.com)
- Username: [gaya3maram66@gmail.com](mailto:gaya3maram66@gmail.com)
- Nickname: User1735722961277757761
- Role: Owner
- User License: Salesforce
- Profile: Owner
- Save it.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, a sidebar lists categories such as 'Permission Set Groups', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. Under 'Users', there's a sub-section for 'Prospector' with a link to 'Users'. The main content area is titled 'User Detail' for 'vicky y'. It shows the following details:

User Detail	
Name	vicky y
Alias	vy
Email	<a href="mailto:gaya3maram66@gmail.com">gaya3maram66@gmail.com</a> [Verify]
Username	gaya3maram66@gmail.com
Nickname	User1735722961277757761
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Role	owner
User License	Salesforce
Profile	owner
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	<input type="checkbox"/>
Activate Windows Go to Settings to activate Windows.	

## Activity 2: Creating Another Users

- Go to Setup → type "Users" in the quick find box → select Users → click New User.
- Fill in the fields:
- First Name: ram
- Last Name: ram
- Alias: rram
- Email ID: [gaya3maram66@gmail.com](mailto:gaya3maram66@gmail.com)
- Username: [gaya3maram77@gmail.com](mailto:gaya3maram77@gmail.com)
- Nickname: User17357273364786717163
- Role: Employer
- User License: Salesforce Platform
- Profile: Standard Platform User
- Save it.

- Go to Setup → type "Users" in the quick find box → select Users → click New User.
- Fill in the fields:
  - First Name: ragu
  - Last Name: raj
  - Alias: rraj
  - Email ID: gaya3maram66@gmail.com
  - Username: gaya3maram@gmail.com
  - Nickname: User17357276106447905820
  - Role: Worker
  - User License: Salesforce Platform

- Profile: Standard Platform User

- Save it.

User Detail

Name	ragu raj	Role	worker
Alias	rraj	User License	Salesforce Platform
Email	gaya3maram66@gmail.com	Profile	Standard Platform User
Username	gaya3maram@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17357276106447905820	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>

All Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit	Awad_Younes	yawad	yawad.8ingtwijubxd.5opk1ebizou.knkvifkvey@student.com		<input checked="" type="checkbox"/>	Cross Org Data Proxy User
<input type="checkbox"/>   Edit	Chatter_Export	chatty	00dm00000000ike70quad.v2Bqlyt2@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>   Edit	Gayathri_Maram	MGava	maramgayathri@student.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>   Edit	Guison_Augie	aqua	aquis.yodaSaeyvZek.8jtwkwzcyo.meukv9nh5si@student.com		<input checked="" type="checkbox"/>	Cross Org Data Proxy User
<input type="checkbox"/>   Edit	rai_ram	rrai	gaya3maram@gmail.com	worker	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>   Edit	ram_ram	rram	gaya3maram77@gmail.com	employer	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>   Edit	User_Integration	integ	integration@00dm00000000ike70quad.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User_Security	sec	insightsecurity@00dm00000000ike70quad.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>   Edit	y_yoky	yy	gaya3maram66@gmail.com	owner	<input checked="" type="checkbox"/>	owner

# Milestone 10: Permission Sets

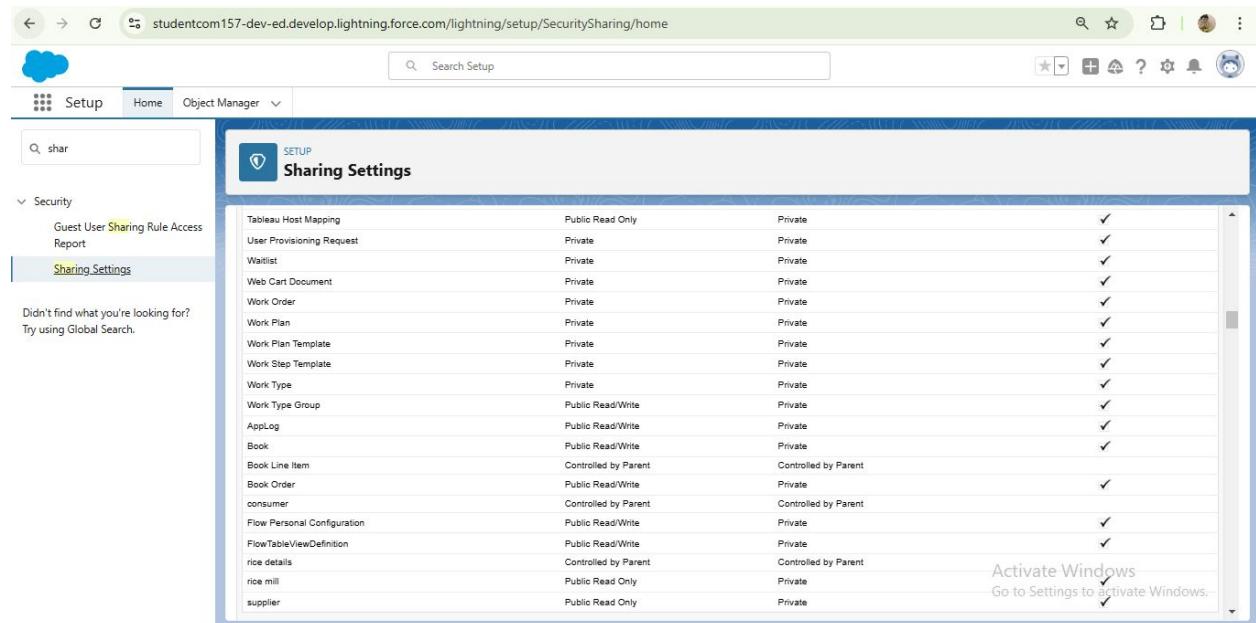
A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles and are the recommended way to manage your users' permissions.

## Activity 1: Creating OWD Setting

- Go to Setup → type "Sharing Settings" in quick search → Click Edit.
- Scroll down, change the default internal access to "Public Read-Only" for Rice Mill and Supplier objects.
- Click Save.

## Extra Information:

By setting the Organization-Wide Defaults (OWD) to "Public Read-Only," every profile has its own access according to their profile. In our case, roles are created and assigned so that the owner can see employer and worker records, and the employer can see worker records.



The screenshot shows the Salesforce Sharing Settings page. The URL in the browser is `studentcom157-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home`. The page title is "Sharing Settings". On the left, there's a sidebar with "Setup" selected and a search bar containing "shar". Under "Sharing Settings", there's a link to "Sharing Rule Access Report". A message says "Didn't find what you're looking for? Try using Global Search." The main content area displays a table of sharing rules for various objects:

Object	Sharing Rule Type	Access Level	Controlled By	
Tableau Host Mapping	Sharing Rule	Public Read Only	Private	✓
User Provisioning Request	Sharing Rule	Private	Private	✓
Waitlist	Sharing Rule	Private	Private	✓
Web Cart Document	Sharing Rule	Private	Private	✓
Work Order	Sharing Rule	Private	Private	✓
Work Plan	Sharing Rule	Private	Private	✓
Work Plan Template	Sharing Rule	Private	Private	✓
Work Step Template	Sharing Rule	Private	Private	✓
Work Type	Sharing Rule	Private	Private	✓
Work Type Group	Sharing Rule	Public Read/Write	Private	✓
AppLog	Sharing Rule	Public Read/Write	Private	✓
Book	Sharing Rule	Public Read/Write	Private	✓
Book Line Item	Sharing Rule	Controlled by Parent	Controlled by Parent	
Book Order	Sharing Rule	Public Read/Write	Private	✓
consumer	Sharing Rule	Controlled by Parent	Controlled by Parent	
Flow Personal Configuration	Sharing Rule	Public Read/Write	Private	✓
FlowTableViewDefinition	Sharing Rule	Public Read/Write	Private	✓
rice details	Sharing Rule	Controlled by Parent	Controlled by Parent	
rice mill	Sharing Rule	Public Read Only	Private	
supplier	Sharing Rule	Public Read Only	Private	

At the bottom right, there's a message: "Activate Windows" and "Go to Settings to activate Windows.".

# 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. Salesforce.com provides a powerful suite of analytic tools to help you organize, view, and analyze your data.

## Activity 1: Create Report

- Go to the app → click on the Reports tab.
- Click New Report.
- Select for Report Type, search for “Rice Mill with Consumers”, click on it, and click Star Report.
- The outline pane is opened already, select the fields that are mentioned below in the Column section:
  - Consumer Name
  - Rice Type
  - Rice Price/kg
  - Mode of Payment
  - Amount Paid
- Remove the unnecessary fields.
- Select the field that is mentioned below in the Group Rows section:
  - ✓ Rice Taken by Shops
  - Click Save and Run .
  - Save the report as “Range of Amount per Day”.
  - Save it.

Reports

Created by Me

1 item

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	range of amount per day	estimated rice per day	Maram Gayathri	Maram Gayathri	1/1/2025, 5:09 pm	✓

RECENT

- Private Reports
- Public Reports
- All Reports

FOLDERS

- All Folders
- Created by Me

Activate Windows  
Go to Settings to activate Windows.

## Activity 2: Sharing Report to Owner

- Click on the report to open it.
- Click the Edit dropdown menu and select the Subscribe option.
- After selecting to run the report as "Another Person," select your personal account or the person you want to send the email to.
- Click Save.
- Note: The owner gets a daily email notification of the Rice Mill report so that they can see all data remotely.

Edit Subscription

Settings

Frequency

Daily   Weekly   Monthly

Time

8:00 am

Attachment

Attach File

Recipients

⚠ Recipients see the same report data as the person running the report.  
Send email to  
Me

Edit Recipients

Run Report As

Me

Unsubscribe

Cancel   Save

Activate Windows  
Go to Settings to activate Windows.

## **Activity 3: Create a Report Folder**

### **Steps to Create a Report Folder:**

- Click on the App Launcher and search for "Reports".
- Double-click on "Reports". The "Reports tab" will be auto-populated in the navigation bar. Click on the "Reports" tab, then click on New Folder.
- Give the Folder Label as "Estimated Rice per Day". The Folder Unique Name will be auto-populated.
- Click Save.

### **Moving a Report to the New Folder:**

- Navigate to the App Launcher and click on Reports.
- Click All Reports.
- Select the "Range of Amount per Day" report from the dropdown menu.
- Click Move.
- Select the "Estimated Rice per Day" folder and click Select.

The screenshot shows the Salesforce Lightning interface for managing reports. The top navigation bar includes links for 'supplier', 'rice mills', 'consumers', 'rice details', and 'Reports'. The 'Reports' link is currently selected. The main content area displays a table titled 'All Folders' with 5 items. The table columns are: Name, Created By, Created On, Last Modified By, and Last Modified Date. The data in the table is as follows:

REPORTS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	Einstein Bot Reports	Automated Process	22/12/2024, 6:03 pm	Automated Process	22/12/2024, 6:03 pm
Created by Me '23	Einstein Bot Reports Summer '23	Automated Process	22/12/2024, 6:03 pm	Automated Process	22/12/2024, 6:03 pm
Private Reports '22	Einstein Bot Reports Summer '22	Automated Process	22/12/2024, 6:03 pm	Automated Process	22/12/2024, 6:03 pm
Public Reports	Einstein Bot Reports Winter '23	Automated Process	22/12/2024, 6:03 pm	Automated Process	22/12/2024, 6:03 pm
All Reports	estimated rice per day	Maram Gayathri	1/1/2025, 5:20 pm	Maram Gayathri	1/1/2025, 5:20 pm

The left sidebar shows navigation categories: Reports, All Folders, FOLDERS, and Favorites. The 'All Folders' section is currently active. A message at the bottom right of the page reads: 'Activate Windows Go to Settings to activate Windows.'

## Overall Reports (Range of amount per day)

Rice taken by shops	consumer: consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
3 (1)	consumers-003	basmati	4	Cash	12.00
			4		12.00
4 (4)	consumers-010	basmati	4	UPI	16.00
	consumers-005	normal rice	5	Net banking	20.00
	consumers-002	normal rice	3	Credit card	12.00
	consumers-004	basmati	4	Cash	16.00
Subtotal			16		64.00
5 (5)	consumers-007	normal rice	5	UPI	25.00
	consumers-009	normal rice	4	Net banking	20.00
	consumers-006	basmati	4	UPI	20.00
	consumers-008	normal rice	4	Debit card	20.00
	consumers-001	basmati	5	UPI	25.00
Subtotal			22		110.00
Total (10)			42		186.00

Activate Windows  
Go to Settings to activate Windows.

## 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

#### Steps to Create a Dashboard Folder:

- Click on the App Launcher and search for "Dashboard".
- Click on the Dashboard tab.
- Click New Folder.
- Give the Folder Label as "Amount Data Dashboard".
- Folder Unique Name will be auto-populated.
- Click Save.

The screenshot shows the Salesforce Lightning interface with the URL <https://studentcom157-dev-ed.lightning.force.com/lightning/o/Dashboard/home?queryScope=userFolders>. The top navigation bar includes links for 'supplier', 'rice mills', 'consumers', 'rice details', 'Reports', and 'Dashboards'. The 'Dashboards' tab is currently active. On the left, a sidebar lists categories like 'Dashboards', 'All Folders', 'Folders', and 'Favorites'. Under 'All Folders', 'All Favorites' is selected. The main content area shows a table of dashboards with columns for Name, Created By, Created On, Last Modified By, and Last Modified Date. One entry is visible: 'amount data dashboard' created by 'Maram Gayathri' on '1/1/2025, 5:26 pm'.

	Name	Created By	Created On	Last Modified By	Last Modified Date
	amount data dashboard	Maram Gayathri	1/1/2025, 5:26 pm	Maram Gayathri	1/1/2025, 5:26 pm

## Activity 2: Create Dashboard

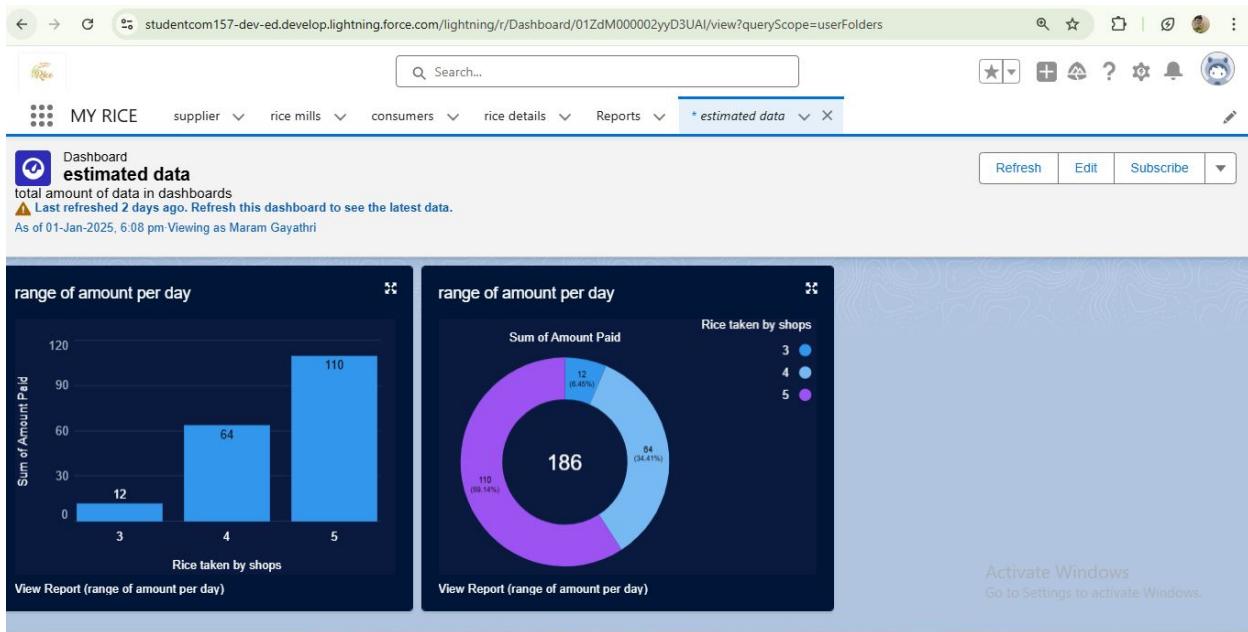
- Go to the App → click on the Dashboards tab.
- Give a Name and select the folder that was created, and click Create.
- Select Add Component.
- Select a Report and click Select.

### **First Component Details:**

- 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

### **Second Component Details:**

- Select Add Component with the same steps as above.
- Display as: Donut Chart
- Sort by: Sum of Amount
- Title: Range of Amount per Day
- Component Theme: Dark



## Milestone 13: Apex

Apex is a strongly typed, object-oriented programming language that allows developers to execute flow and transaction control statements on the Lightning platform server in conjunction with calls to the Lightning Platform API. Using syntax that looks like Java and acts like database stored procedures, Apex enables developers to add business logic to most system events, including button clicks, related record updates, and Visualforce pages. Apex code can be initiated by Web service requests and from triggers on objects.

It is as similar as java i.e, it also supports OOP( Object oriented programming) like Classes, objects, methods.

### Creating Classes :

Apex classes are modeled on their counterparts in Java. You'll define, instantiate, and extend classes, and you'll work with interfaces, Apex class versions, properties, and other related class concepts.

- **Class:**

As in Java, you can create classes in Apex. A class is a template or blueprint

from which objects are created. An object is an instance of a class.

- **Object**

Object is an instance of a class, where it can access all the properties that are present in a class i.e, variables and methods.

### **Activity 1: Creating an Apex Class(ConsumerRecord)**

1. Login to the Salesforce account and navigate to the gear account in the top right corner.
2. Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.
3. Then you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Class.
4. Enter the name of the class(ConsumerRecord) to create a new class file.

#### **Code Snippet :**

```
class ConsumerRecord {  
    public static void sendEmailNotification (List<consumer__c> con){  
        for(consumer__c c:con)  
        {  
            Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();  
            email.setToAddresses( new List<String>{c.email__c});  
            email.setSubject('Welcome to our company');  
            email.setPlainTextBody('Dear ' + '+'\n\nWelcome to MY RICE!'+'You have  
been seen as a valuable customer to us. Please continue your journey with us, while we  
try to provide you with good quality resources.'+'\n+'  
                "We are proud to associate with valuable customers like you  
and we look forward to collaborating with you by providing more and more exciting  
discounts or even product offers too.' + '\n'  
                +'So why taking a step back, take a leap of faith and shop with  
us more, while we provide with the valuable products and offers+'\n+'\n+'\n+'  
                'Thankyou for buying '+ " "+'Here are some of the products that  
are brought by the customers who similarly bought products like this+'\n\n');  
            Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});  
        }  
    }  
}
```

```

        }
    }
}

<--> studentcom157-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File Edit Debug Test Workspace Help < >
ConsumerRecord.apxc consumerTrigger.apxc
Code Coverage: None API Version: 62 Go To
1 public class ConsumerRecord {
2     public static void sendEmailNotification (List<consumer__c> con){
3         for(consumer__c c:con)
4         {
5             Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
6             email.setToAddresses( new List<String>{c.email__c});
7             email.setSubject('Welcome to our company');
8             email.setPlainTextBody('Dear ' + ' ' + ',\n\nWelcome to MY RICE!'+'You have been seen as a valuable customer to us. Please continue
9             'We are proud to associate with valuable customers like you and we look forward to collaborating with you.
10             +'So why taking a step back, take a leap of faith and shop with us more, while we provide with the value
11             'Thankyou for buying ' + '' +'Here are some of the products that are brought by the customers who similar
12             Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
13
14         }
15     }
16 }

```

Logs Tests Checkpoints Query Editor View State Progress Problems

User Application Operation Time Status Read Go to Site Settings to activate Windows.

## Activity 2:Creating an Apex Trigger

### How to create a new trigger :

While still in the trailhead account, navigate to the gear icon in the top right corner.

Click on developer console and you will be navigated to a new console window.

Click on the File menu in the toolbar, and click on new? Trigger.

Enter the trigger name and the object to be triggered.

### Syntax For creating trigger :

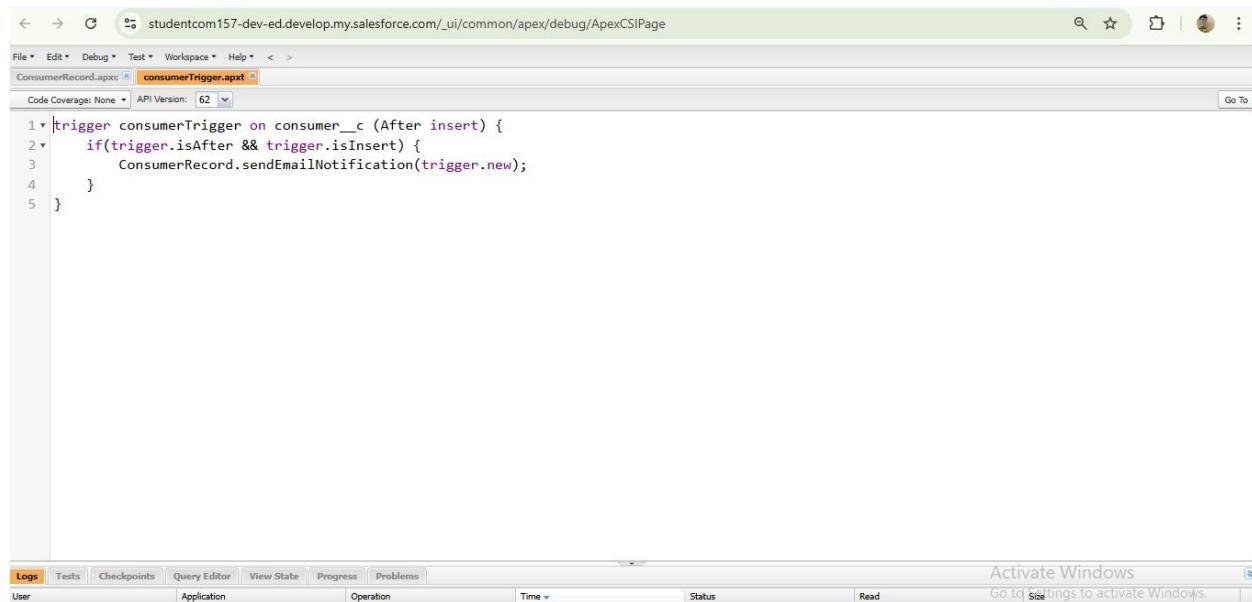
The syntax for creating trigger is :

```
Trigger [trigger name] on [object name]( Before/After event) {
    //Trigger Logic
}
```

### Trigger code:

```
trigger consumerTrigger on consumer__c (After insert) {
    if(trigger.isAfter && trigger.isInsert) {
        ConsumerRecord.sendEmailNotification(trigger.new);
    }
}
```

}



The screenshot shows the Salesforce Apex code editor interface. The title bar indicates the URL: studentcom157-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage. The tab bar shows 'ConsumerRecord.apxc' and 'consumerTrigger.apxt'. The code editor displays the following Apex trigger:

```
1 trigger consumerTrigger on consumer__c (After insert) {
2     if(trigger.isAfter && trigger.isInsert) {
3         ConsumerRecord.sendEmailNotification(trigger.new);
4     }
5 }
```

The code coverage is listed as 'None' and the API version is '62'. A 'Go To' button is located in the top right corner of the code editor.

Below the code editor is a navigation bar with tabs: Logs, Tests, Checkpoints, Query Editor, View Stats, Progress, and Problems. The 'Logs' tab is currently selected. On the far right of the navigation bar, there is an 'Activate Windows' watermark with the text 'Go to Settings to activate Windows.' and a Microsoft logo.