

A CRM APPLICATION FOR WHOLESALE RICE MILL

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Abstract:

This initiative presents a Customer Relationship Management (CRM) solution specifically tailored for rice milling operations, facilitating the effective monitoring of daily production, sales, and revenue. It includes comprehensive reporting capabilities, summary fields that aggregate rice supply information, and cross-object formula fields for payment calculations. Validation rules are implemented to maintain data integrity, and role-based permissions offer customized access for owners, employees, and laborers. By utilizing Salesforce CRM, the system enhances operational efficiency and resource management, rendering it an essential asset for rice milling facilities.

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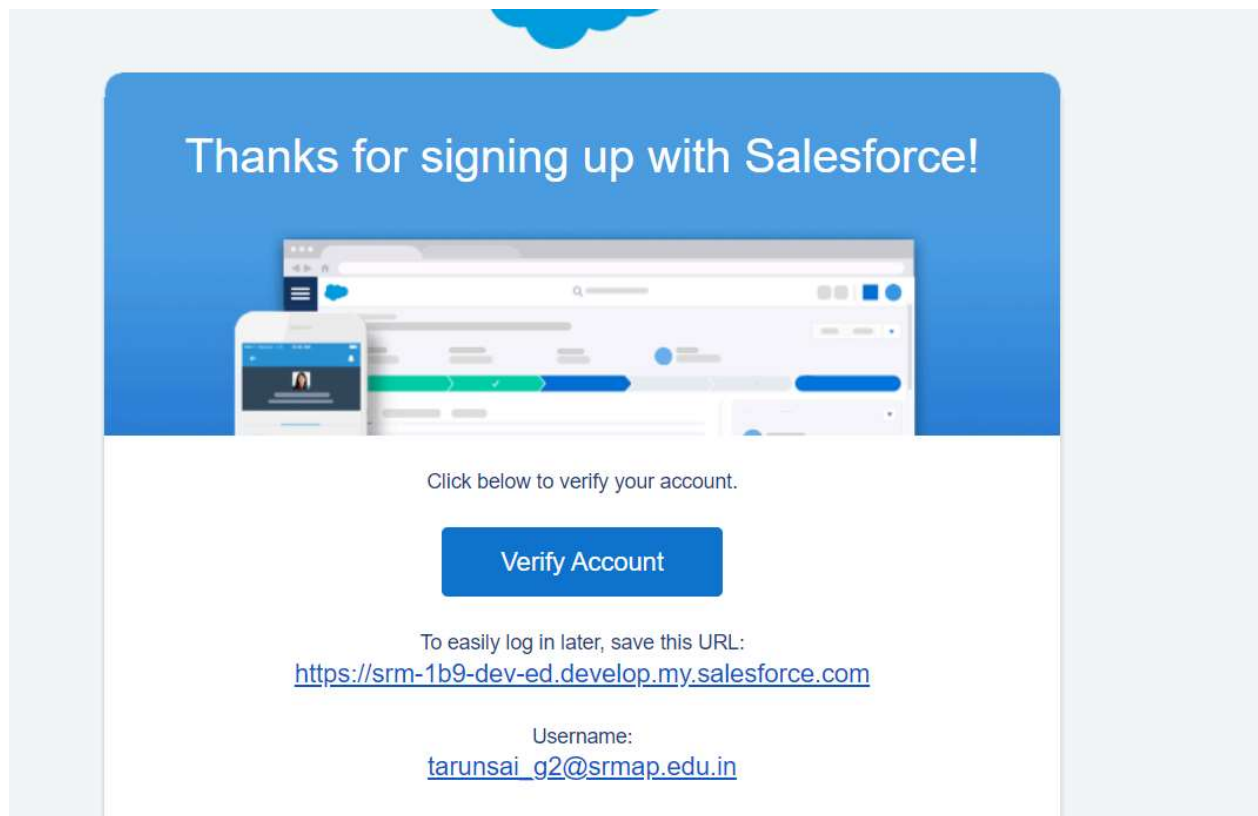
1. Introduction to Salesforce

1. Creating a Developer Account

- Visit [Salesforce Developer Signup](#)
- Fill in the required details (name, email, role, etc.) and click "Sign Me Up."

2. Account Activation

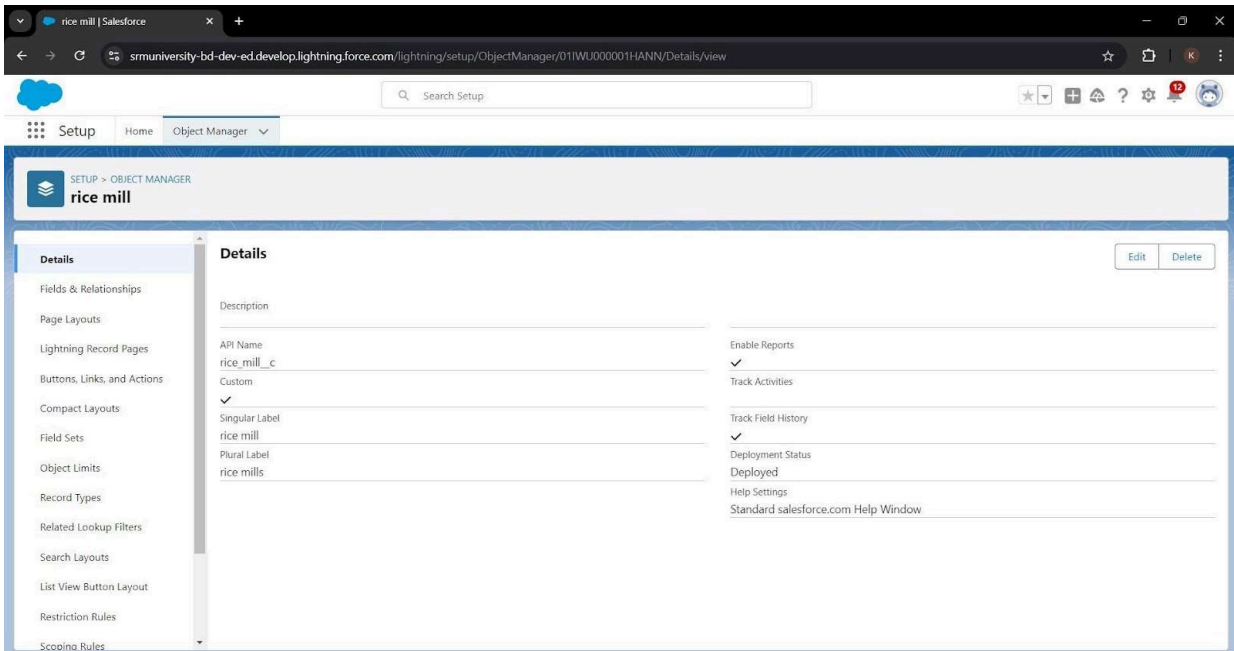
- Check your email, click "Verify Account," set your password, and complete the security question setup.



2. Create Objects

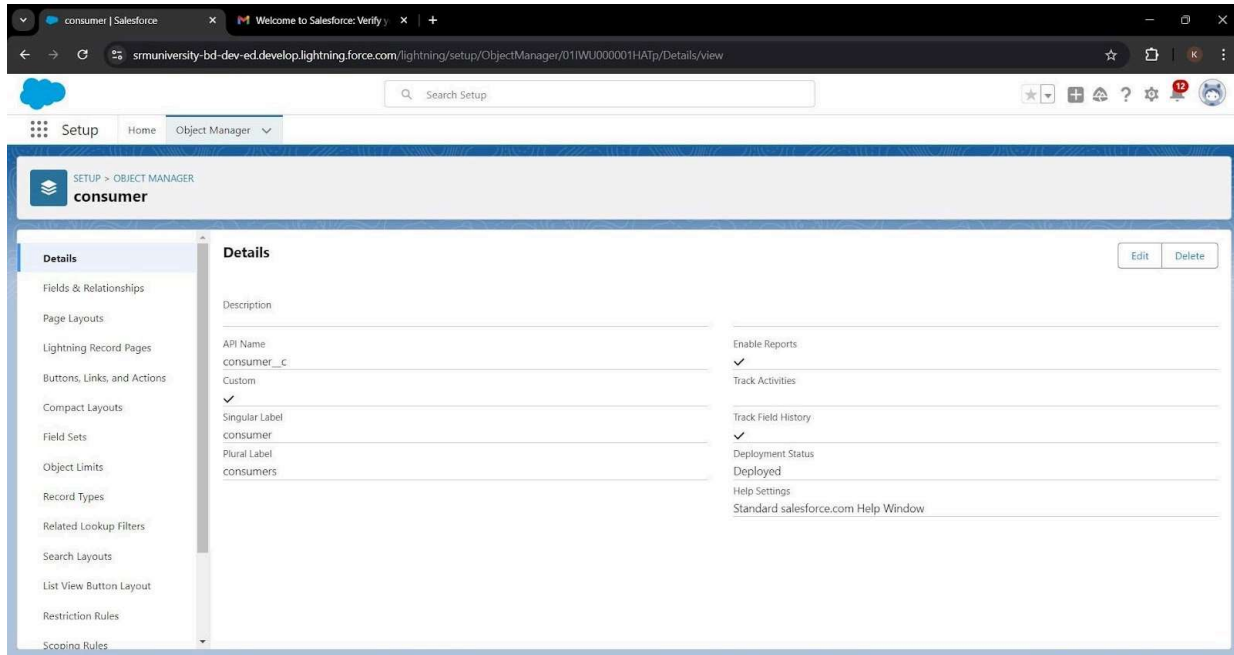
1. Rice Mill Object

- . Go to **Setup > Object Manager > Create > Custom Object**
- . Enter:
 - . **Label Name:** Rice Mill
 - . **Plural Label:** Rice Mills
 - . **Record Name:** Auto Number (Format: rice-{000})
 - . **Starting Number:** 1
- . Enable **Reports**, **Track Field History**, and **Allow Search**
- . Click **Save**.



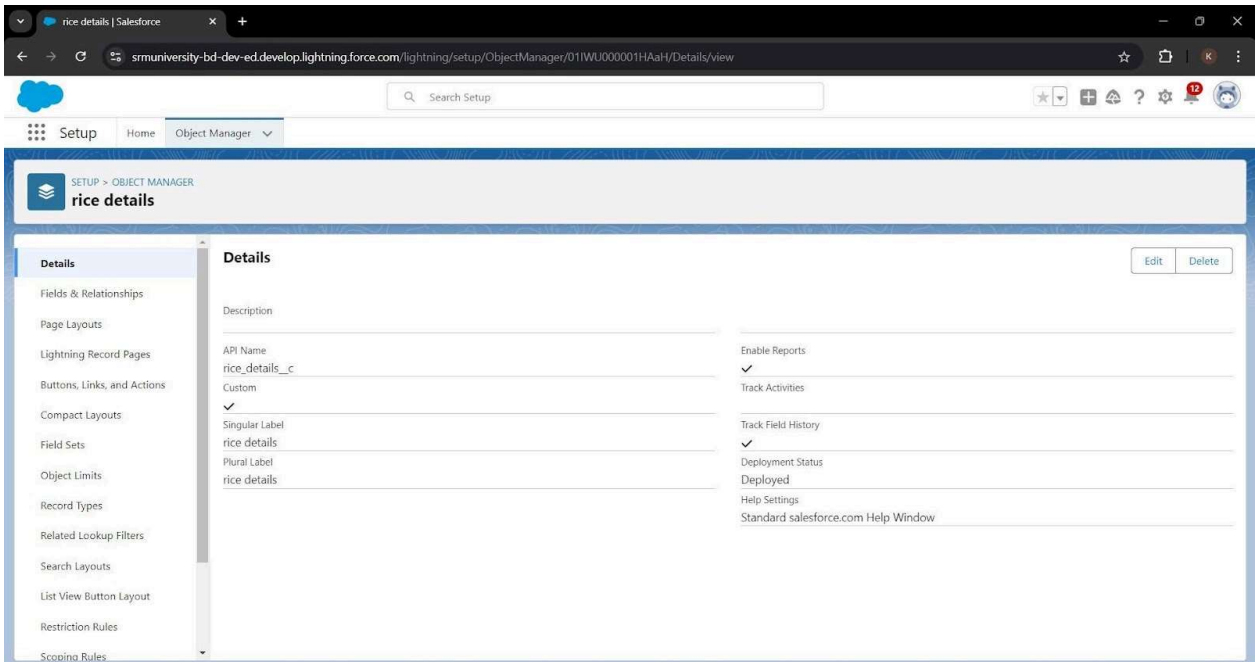
2. Consumer Object

- . Same steps as Rice Mill Object
- . Use:
 - . **Label Name:** Consumer
 - . **Plural Label:** Consumers
 - . **Display Format:** consumers-{000}
 - . **Starting Number:** 1



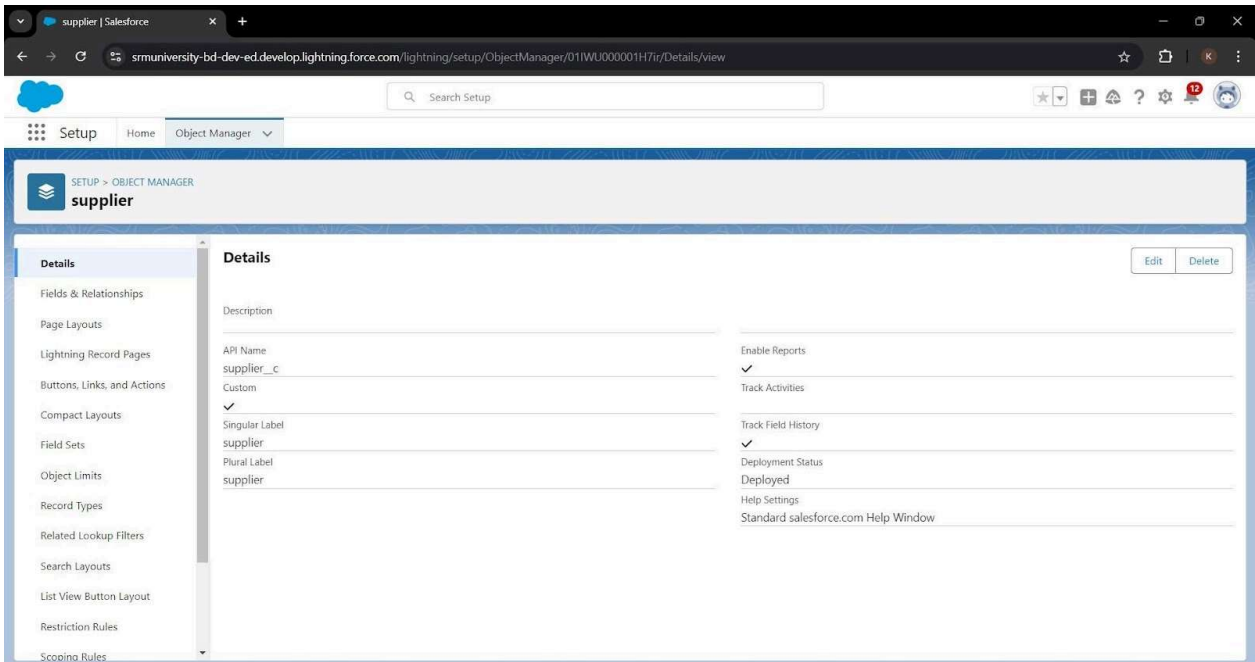
3. Rice Details Object

- . Same steps as Rice Mill Object
- . Use:
 - . **Label Name:** Rice Details
 - . **Plural Label:** Rice Details
 - . **Display Format:** rice-{000}
 - . **Starting Number:** 1



4. Supplier Object

- Same steps as Rice Mill Object
- Use:
 - **Label Name:** Supplier
 - **Plural Label:** Suppliers
 - **Record Name:** Supplier Name (Text)
- Enable **Reports**, **Track Field History**, and **Allow Search**
- Click **Save**.



3. Tabs

Tab: A UI element for creating and viewing object records.

Types of Tabs:

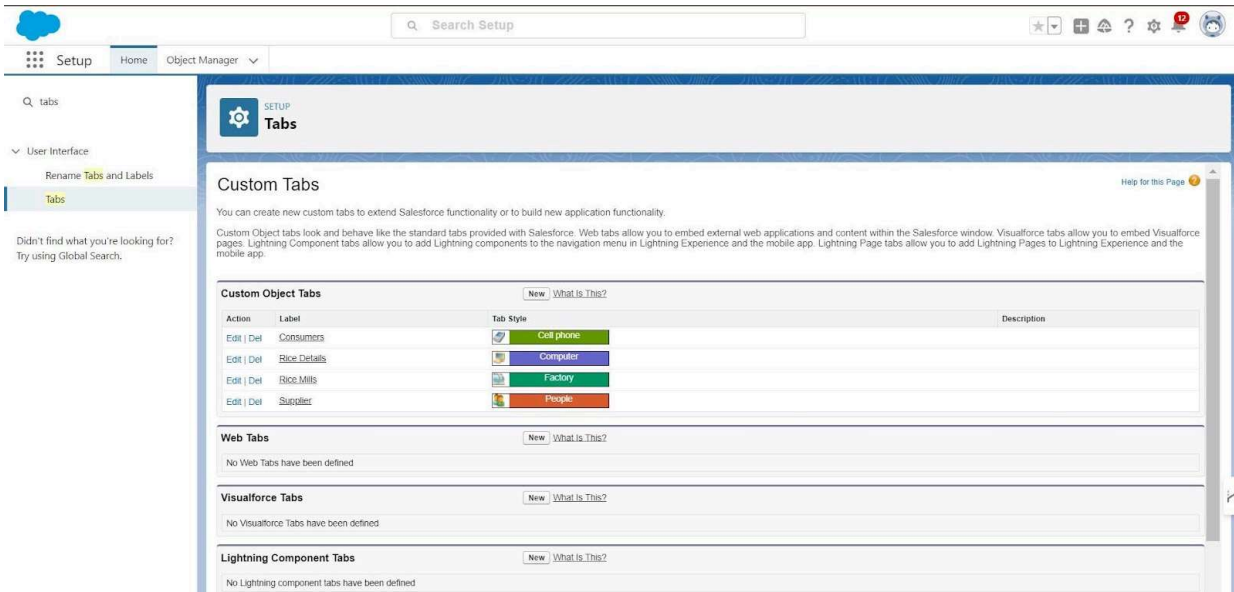
1. **Custom Tabs:** For custom objects, similar to standard tabs.
2. **Web Tabs:** Display external web content inside Salesforce.
3. **Visualforce Tabs:** Show custom Visualforce pages.
4. **Lightning Component Tabs:** Add Lightning components to the navigation.
5. **Lightning Page Tabs:** Add Lightning Pages to mobile app navigation.

1. Creating a Custom Tab (Supplier)

1. Go to **Setup** > search "Tabs" > click **Tabs** > **New** under Custom Object Tab.
2. Select **Supplier** object > choose a style > click **Next**.
3. Keep default settings > click **Next**.
4. Uncheck **Include Tab in Custom App**, ensure **Append Tab** is checked.
5. Click **Save**.

2. Creating Remaining Tabs

- Repeat the same steps for **Rice Mill**, **Consumer**, and **Rice Details**.



4. The Lightning App

A Lightning App bundles objects, tabs, and tools for easy access, with options for branding and a utility bar for quick navigation.

1. Create a Lightning App

1. **Access Setup:** Go to the Setup page and search for **App Manager** in the quick find box.
2. **Create New App:** Select **App Manager** and click on **New Lightning App**.

3. App Details:

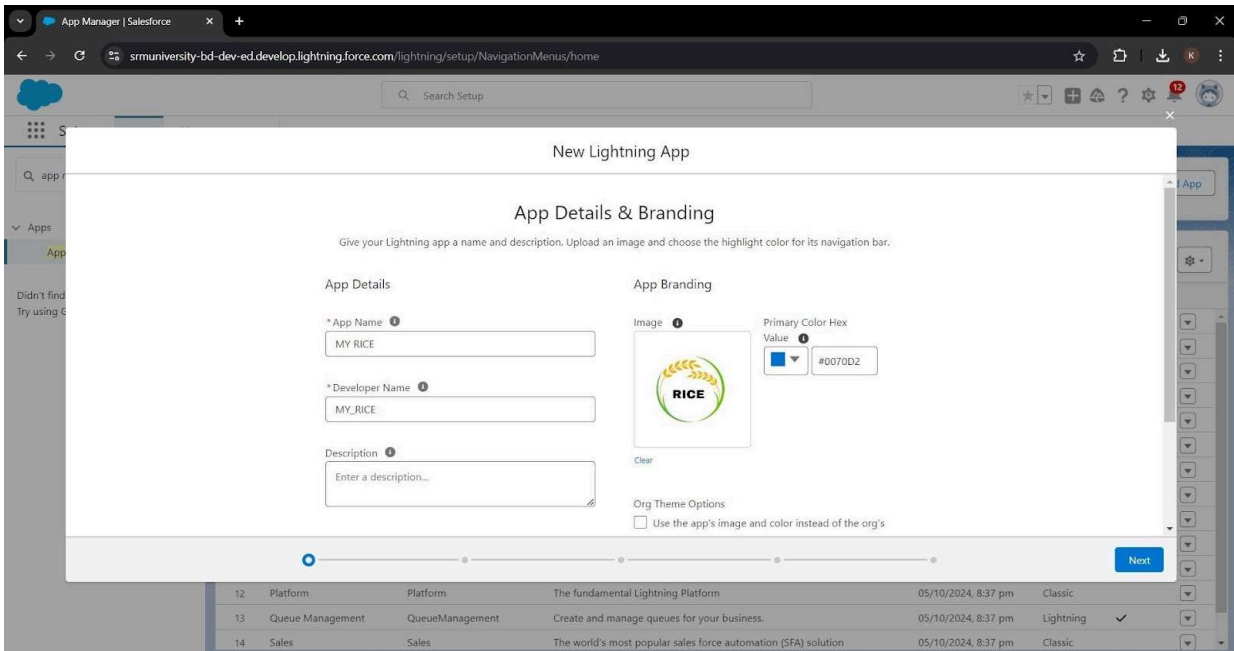
- Enter the app name as **MY RICE** and click **Next**.
 - Leave the App Options page as default and click **Next**.
 - Keep the Utility Items as default and click **Next**.
4. **Upload Photo:** Upload a photo related to your app.

5. Add Navigation Items:

- Select items (Supplier, Rice Mill, Consumer, Rice Details) from the search bar and move them using the arrow button. Click **Next**.

6. Add User Profiles:

- Search for **System Administrator** in the search bar and click the arrow button to add it. Click **Save & Finish**.



5. Fields

In Salesforce, fields store data in the columns of a relational database, making it easier to search, delete, and edit records.

Types of Fields

1. Standard Fields:

- Predefined fields performing standard tasks.
- Cannot be deleted if required; otherwise, they can be removed.
- Common examples: Created By, Owner, Last Modified.

2. Custom Fields:

- Flexible fields that users can modify as needed.
- Users can choose to add or remove them from records.

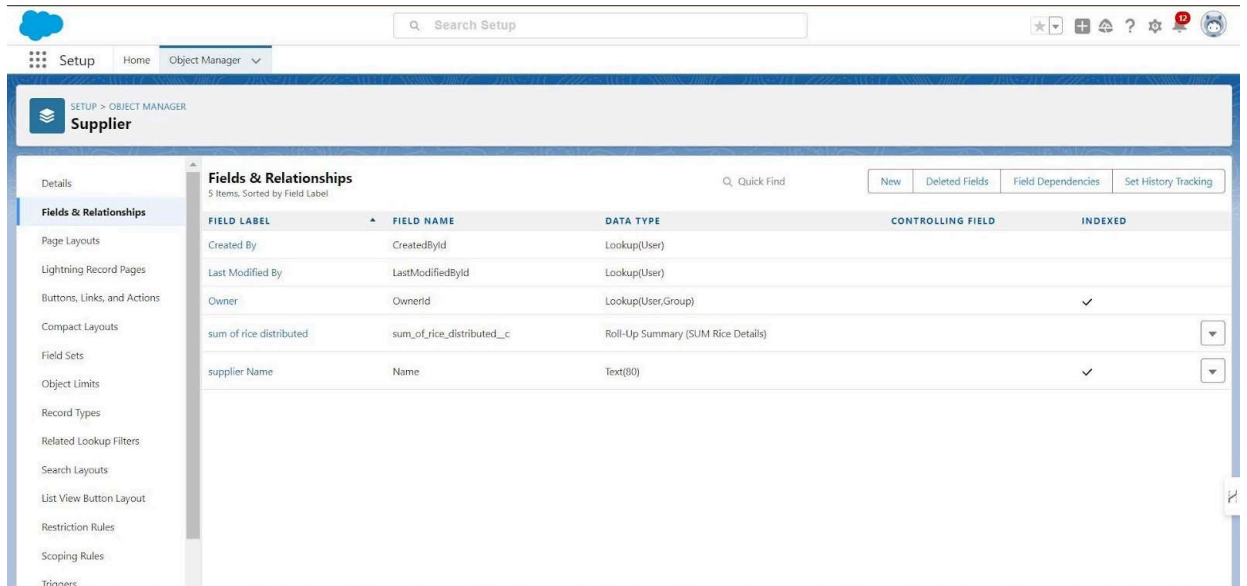
1. Creating the Number Field in Rice Details Object

1. Go to **Setup > Object Manager > Edit** for the **Rice Details** object.
2. Click **Fields & Relationships > New**.
3. Select **Number** as the data type and click **Next**.
4. Enter **Field Label** as **Rice Distributed** (length: 5) and click **Next > Next > Save**.

2. Creating Junction Object

1. Go to **Setup > Object Manager > edit Rice Details** object.

2. Click **Fields & Relationships** > **New** > select **Master-Detail** relationship.
3. Select related object as **Supplier** > Field Label: "Supplier Name" > **Next** > **Save**.
4. Repeat for **Rice Mill** object with label "Rice Mill 1".

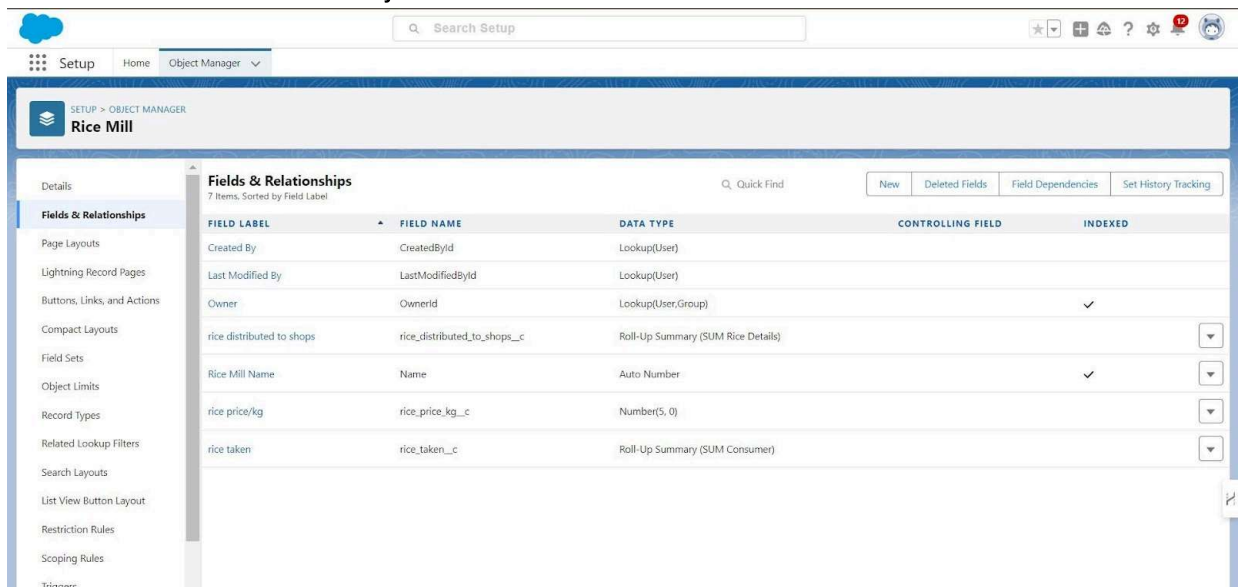


The screenshot shows the Salesforce Setup interface with the 'Supplier' object selected. The 'Fields & Relationships' section is active, displaying a table of fields for the 'Supplier' object. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

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)		✓
sum of rice distributed	sum_of_rice_distributed_c	Roll-Up Summary (SUM Rice Details)		
supplier Name	Name	Text(80)		✓

3. Creating a Master-Detail Relationship

1. Go to **Setup** > **Object Manager** > edit **Consumer** object.
2. Click **Fields & Relationships** > **New** > select **Master-Detail** relationship.
3. Select **Rice Mill** as related object > Field Label: "Rice Mill Name" > **Next** > **Save**.

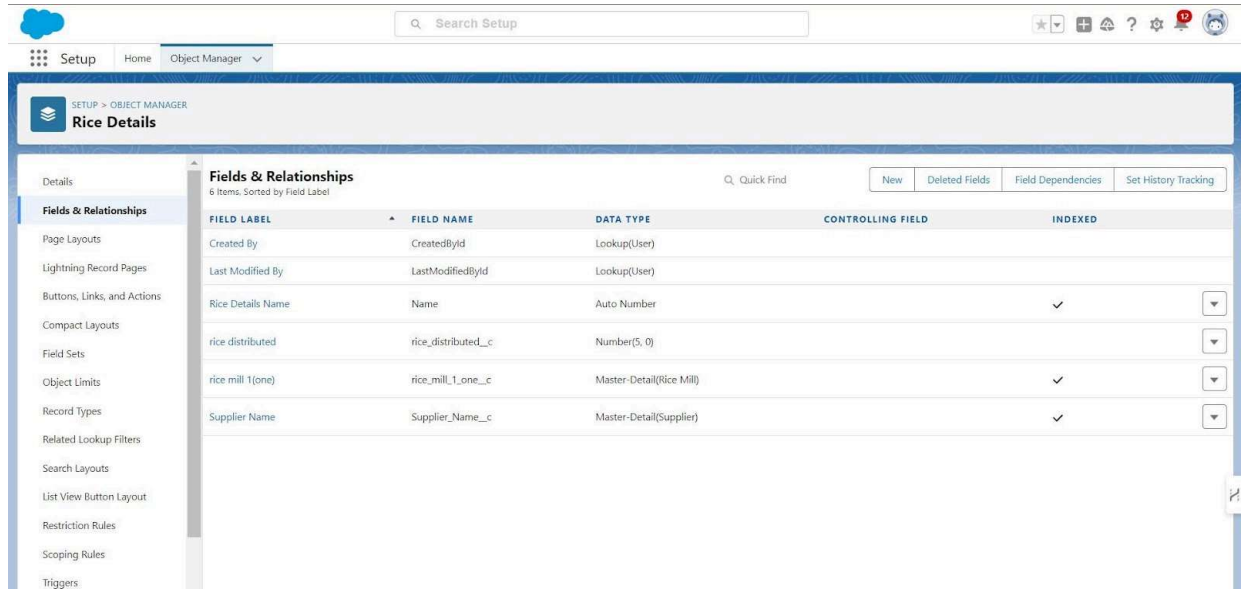


The screenshot shows the Salesforce Setup interface with the 'Rice Mill' object selected. The 'Fields & Relationships' section is active, displaying a table of fields for the 'Rice Mill' object. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

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)		

4. Creating Roll-Up Summary Field

1. Go to **Setup > Object Manager > select Supplier > Fields & Relationships > New**.
2. Select **Roll-Up Summary > Field Label: "Sum of Rice Distributed"**.
3. Select summarized object as **Rice Details > Roll-up type: Sum > field to aggregate: Rice Distributed**.
4. Repeat for **Rice Mill** object.



5. Creating Fields in Rice Details Object

1. Go to **Setup > Object Manager > Edit** for the **Rice Details** object.
2. Click **Fields & Relationships > New**.
3. Select **Data Type** as **Master-Detail** and click **Next**.
4. Enter **Field Label** as **Supplier Name** (Length: 5).
5. Field Name will auto-populate; click **Next > Next > Save**.

6. Creating Fields in Rice Mill Object

1. Go to **Setup > Object Manager > Edit** for the **Rice Mill** object.
2. Click **Fields & Relationships > New**.
3. Select **Number** as the data type and click **Next**.
4. Enter **Field Label** as **Rice Price/kg** (length: 5) and click **Next > Next > Save**.

7. Creating Fields in Consumer Objects

- First Name: **Text**

- Last Name: **Text**
- Phone Number: **Phone**
- Email: **Email**
- Rice Taken by Shops: **Number (5)**
- Rice Type: **Picklist (Basmati, Normal Rice)**
- Mode of Payment: **Picklist (Credit Card, Debit Card, Net Banking, UPI, Cash)**

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(50)		
Last Modified By	LastModifiedById	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(15, 0)		
rice taken by shops in kgs	rice_taken_by_shops_in_kgs__c	Number(16, 0)		

8. Creating Cross-Object Formula Field in Consumer Object

1. Go to **Setup > Object Manager > edit Consumer** object.
2. Click **Fields & Relationships > New > select Formula > Formula return type: Number**.
3. Field Label: "Amount Paid" > Formula: `rice_taken_by_shops_c * rice_mill_name_r.rice_price_kg.c.`
4. Click **Check Syntax > Save**.

9. Creating Validation Rule (Phone Number & Email)

1. Go to **Setup > Object Manager > edit Consumer** object.
2. Click **Validation Rules > New**.
3. Rule Name: "Phonenumberoremailblankrule" > Formula: `OR(ISBLANK(phone_number_c), ISBLANK(email_c)).`
4. Error Message: "Please fill in your phone number" > Error location: "Top of page" > **Save**.

6. Page Layouts

Page Layouts in Salesforce allow us to customize the design and organization of detail and edit pages for records. They control the display of fields, related lists, and custom links for both standard and custom objects, enhancing the user interface and experience.

1. Creating a Page Layout

To create a Page Layout:

1. Go to **Setup > Object Manager**.
2. Search for and select the **Consumer** object.
3. Click on **Page Layouts > New**.
4. Choose an existing layout, name it **"Consumer Layout,"** and click **Save**.
5. Drag and drop fields into the section named **Personal Details**: First Name, Last Name, Consumer Name, Phone Number, Email, Rice Mill Name.
6. Create another section called **Rice Details** and add: Rice Taken by Shop, Rice Type.
7. Create a final section called **Receipt Details** and add: Mode of Payment, Amount Paid.
8. Click **Save**.

The screenshot shows the Salesforce Setup interface for the 'Consumer' object. The left sidebar lists various setup options, with 'Page Layouts' selected. The main area displays the 'Consumer Layout' editor. The layout is divided into three sections: 'Personal details', 'Rice details', and 'Receipt details'. Each section contains a list of fields and their values.

Section	Field	Value
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
Rice details	Rice taken by shops	57,888
	Rice Type	Sample Text
Receipt details	Mode of payment	Sample Text
	Amount Paid	754.64

Additional information visible in the layout includes:

- Information (Header visible on edit only): rice taken by shops in kgs 32,730
- System Information (Header visible on edit only): Created By Sample Text, Last Modified By Sample Text
- Custom Links (Header visible on edit only):

The screenshot shows a web application interface for managing consumers. The main window is titled 'New Consumer'. On the left, there is a sidebar with a 'Consumers' section showing a list of 8 items, including 'consumers-008' through 'consumers-001'. The main form area is divided into three sections: 'Personal details', 'rice details', and 'Receipt details'. The 'Personal details' section includes fields for 'First Name', 'Last Name', 'Consumer Name', 'Phone Number', and 'email'. The 'rice details' section includes a field for 'Rice taken by shops' and a dropdown for 'Rice Type'. The 'Receipt details' section includes a dropdown for 'Mode of payment'. At the bottom of the form, there are buttons for 'Cancel', 'Save & New', and 'Save'. The top navigation bar includes 'MY RICE', 'Supplier', and 'Consumers'.

7. Profiles

A profile is a collection of settings and permissions that define user capabilities within the system, controlling aspects like object and field permissions, app settings, and login restrictions. Profiles can be aligned with job functions such as System Administrator or Sales Representative.

Types of

Profiles

Standard

Profiles:

- Default profiles provided by Salesforce (e.g., Contract Manager, Read Only, Marketing User, Standard User, System Administrator).
- Cannot be deleted and come with default permissions for standard objects.

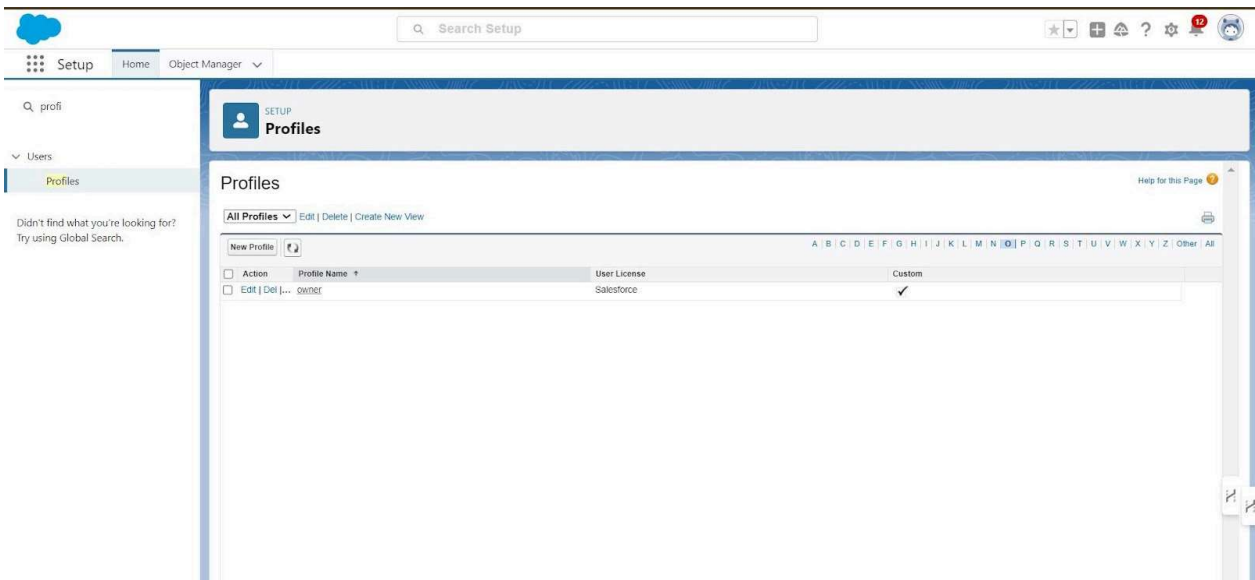
Custom Profiles:

- Defined by users and can be deleted if not assigned to any users.

1. Owner Profile

To create a new Owner Profile:

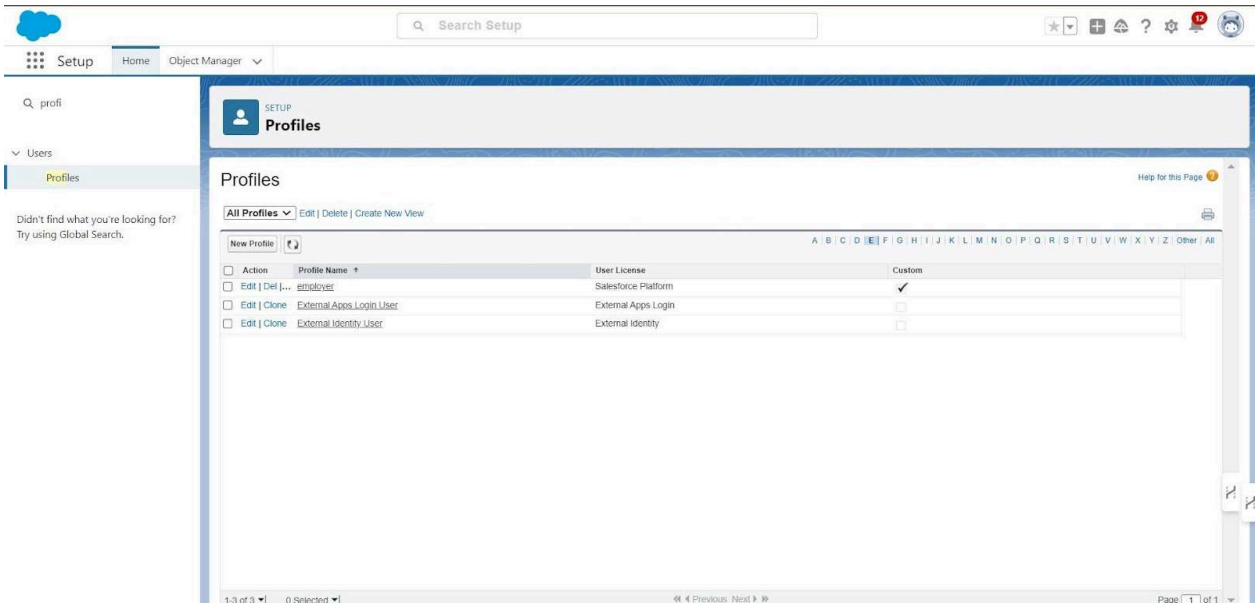
1. Go to **Setup** and type **Profiles** in the Quick Find box.
2. Click on **Profiles** and clone the desired profile (e.g., **Standard User**).
3. Enter the profile name as **Owner** and click **Save**.
4. Scroll down to **Custom Object Permissions** and grant access permissions for the following objects:
 - Consumers
 - Rice Details
 - Rice Mill
 - Suppliers
5. Click **Save** to finalize the permissions.



2. Employer Profile

To create a new Employer Profile:

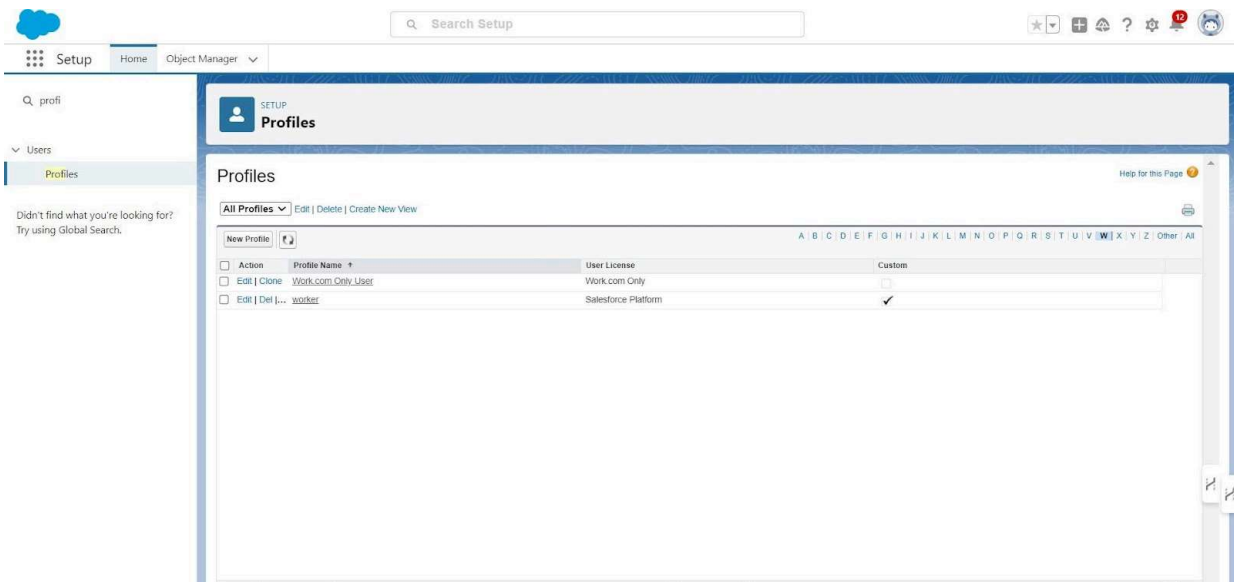
1. Go to **Setup** and search for **Profiles**.
2. Clone the **Standard Platform User** profile and name it **Employer**. Click **Save**.
3. Click **Edit** and set the **Custom App Settings** to default for the Rice Mill.
4. In **Custom Object Permissions**, grant access for:
 - Consumers
 - Rice Details
 - Rice Mill
 - Suppliers
5. Click **Save**.



3. Worker Profile

To create a new Worker Profile:

1. Go to **Setup** and search for **Profiles**.
2. Clone the **Standard Platform User** profile and name it **Worker**. Click **Save**.
3. Click **Edit** on the profile page.
4. Set the **Custom App Settings** to default for the Rice Mill.
5. In **Custom Object Permissions**, grant access for:
 - Consumers
 - Rice Details
 - Rice Mill
 - Suppliers
6. Click **Save** to finalize the changes.



8. Role & Role Hierarchy

In Salesforce, a **role** defines a user's visibility and access at the record level. Roles specify the types of access users can have to data, determining what they can see within the organization. Essentially, roles help control data visibility and sharing based on the user's position within the role hierarchy.

1. Creating Owner Role

To create an Owner Role:

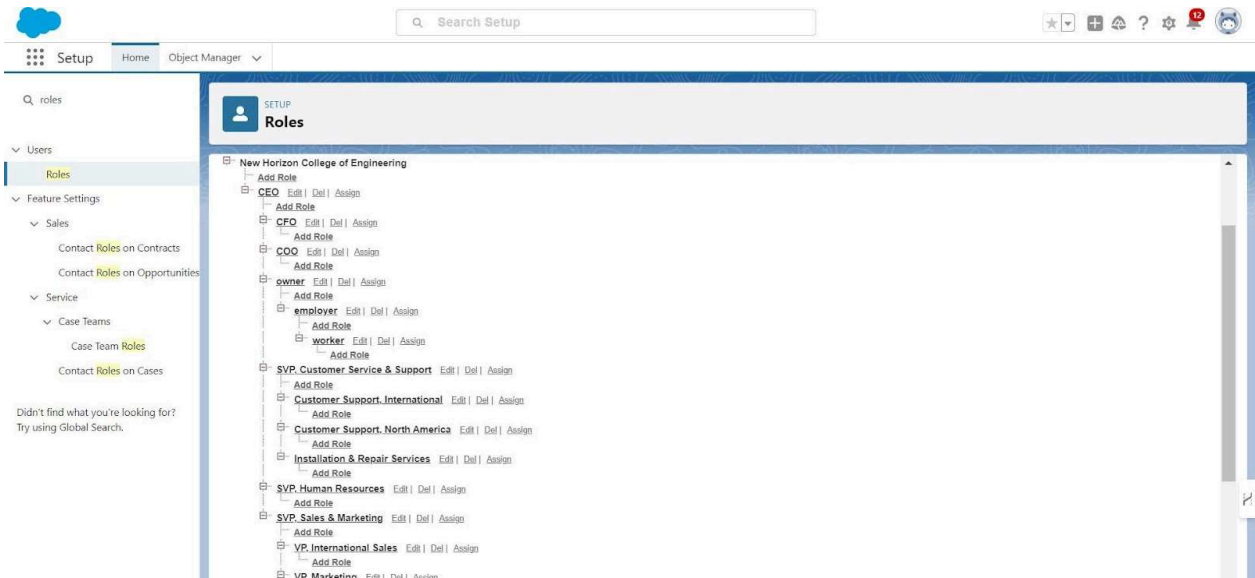
1. Go to **Quick Find** and search for **Roles**.
2. Click on **Setup Roles**.
3. Click **Expand All** and then click **Add Role** under the relevant parent role.
4. Enter **Owner** as the label (Role name auto-populates).
5. Click **Save**.

2. Creating Employer Roles

To create Employer and Worker roles under Manager:

1. Go to **Quick Find** and search for **Roles**.
2. Click on **Setup Roles**.
3. Click the **plus (+)** next to the **CEO** role and select **Add Role** under **Owner**.
4. Enter **Employer** as the label (Role name auto-populates) and click **Save**.

5. Repeat the process: click the **plus (+)** next to **CEO**, then under **Owner**, click the **plus (+)** next to **Employer** and select **Add Role**.
6. Enter **Worker** as the label (Role name auto-populates) and click **Save**.



9. Users

A **user** in Salesforce is anyone who logs in to the platform, including employees like sales reps, managers, and IT specialists. Each user has an account that identifies them and defines their access to features and records within the system.

1. Create User

To create a new user:

1. Go to **Setup** and type **Users** in the Quick Find box.
2. Select **Users** and click **New User**.
3. Fill in the fields:
 - **First Name:** Vicky
 - **Last Name:** Y
 - **Alias:** (Enter an alias)
 - **Email:** (Enter your personal email)
 - **Username:** (Use the format text@text.text)
 - **Nickname:** (Enter a nickname)
 - **Role:** Owner
 - **User License:** Salesforce

- . **Profile:** Owner

4. Click **Save**.

The screenshot shows the Salesforce Setup interface. On the left, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. The 'Users' section is expanded, showing 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The 'Users' link is highlighted. The main content area is titled 'Users' and shows the 'User Detail' for a user named 'vicky y'. The user's email is 'vicky6895@gmail.com' and their role is 'owner'. The user is active and has the 'Salesforce' license. The user's profile is 'owner'. The user's nickname is 'vicky'. The user's title is 'Marketing User'. The user's company is 'vicky'. The user's department is 'Marketing User'. The user's division is 'Marketing User'. The user's address is 'Marketing User'. The user's time zone is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The user's locale is 'English (India)'. The user's language is 'English'. The user's delegated approver is 'Manager'. The user's manager is 'Only if I am an approver'. The user's receive approval request emails is 'Only if I am an approver'. The user's federation ID is 'Only if I am an approver'. The user's app registration: one-time password authenticator is 'Only if I am an approver'. The user's app registration: Salesforce authenticator is 'Only if I am an approver'. The user's security key (U2F or WebAuthn) is 'Only if I am an approver'. The user's lightning login is 'Only if I am an approver'. The user's temporary verification code is 'Only if I am an approver'. The user's role is 'owner'. The user's user license is 'Salesforce'. The user's profile is 'owner'. The user's active status is 'Active'. The user's marketing user status is 'Marketing User'. The user's offline user status is 'Offline User'. The user's knowledge user status is 'Knowledge User'. The user's flow user status is 'Flow User'. The user's service cloud user status is 'Service Cloud User'. The user's site.com contributor user status is 'Site.com Contributor User'. The user's site.com publisher user status is 'Site.com Publisher User'. The user's WDC user status is 'WDC User'. The user's mobile push registrations status is 'Mobile Push Registrations'. The user's data.com user type is 'Data.com User Type'. The user's accessibility mode (classic only) is 'Accessibility Mode (Classic Only)'. The user's debug mode is 'Debug Mode'. The user's high-contrast palette on charts is 'High-Contrast Palette on Charts'. The user's load lightning pages while scrolling is 'Load Lightning Pages While Scrolling'. The user's Salesforce CRM content user status is 'Salesforce CRM Content User'. The user's receive Salesforce CRM content email alerts status is 'Receive Salesforce CRM Content Email Alerts'. The user's receive Salesforce CRM content alerts as daily digest status is 'Receive Salesforce CRM Content Alerts as Daily Digest'. The user's make setup my default landing page status is 'Make Setup My Default Landing Page'.

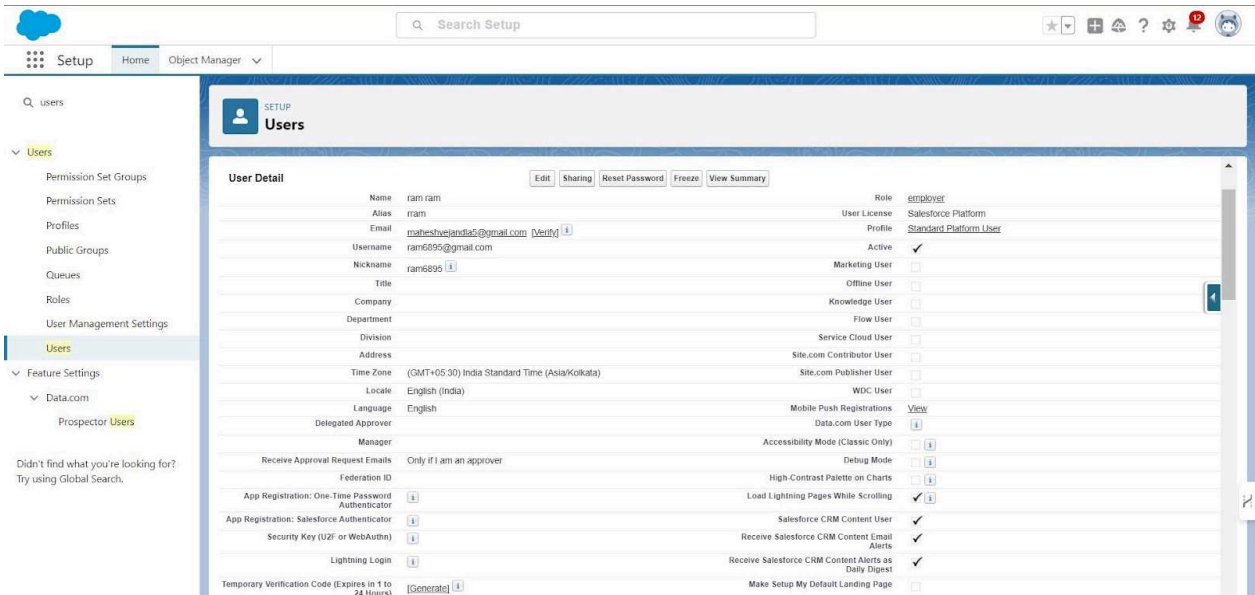
2. Creating Another User

To create another user:

1. Go to **Setup** and type **Users** in the Quick Find box.
2. Select **Users** and click **New User**.
3. Fill in the fields:

- . **First Name:** Ram
- . **Last Name:** Ram
- . **Alias:** (Enter an alias)
- . **Email:** (Enter your personal email)
- . **Username:** (Use the format text@text.text)
- . **Nickname:** (Enter a nickname)
- . **Role:** Employer
- . **User License:** Salesforce Platform
- . **Profile:** Standard Platform User

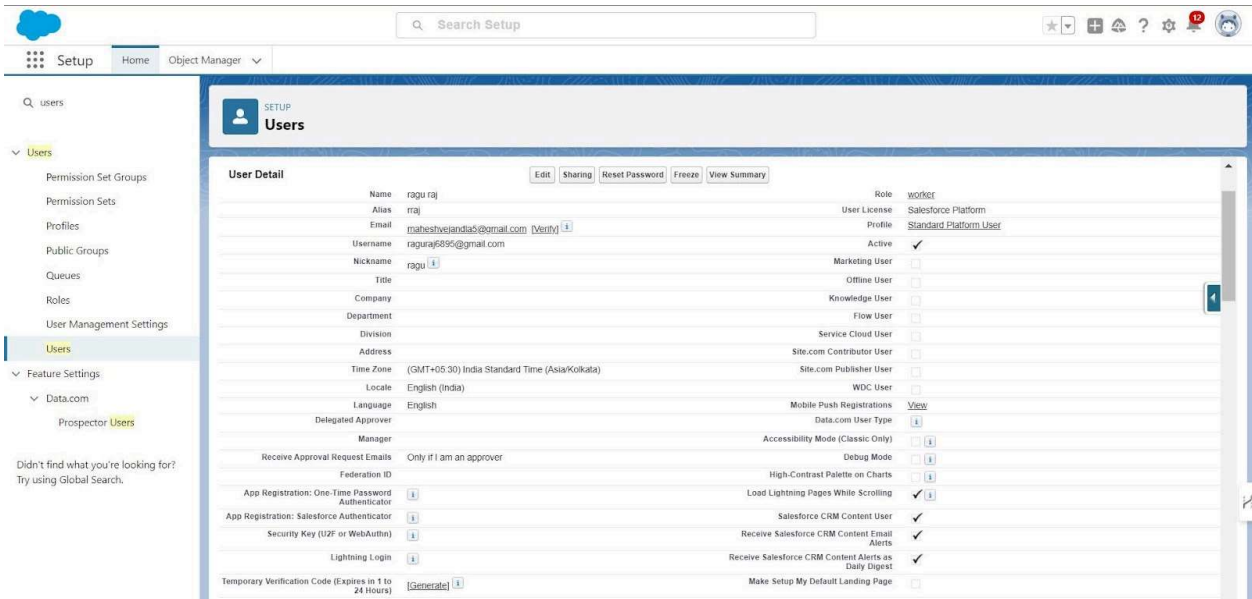
4. Click **Save**.



3. Creating Another User

To create another user:

1. Go to **Setup > Users**.
2. Click **New User**.
3. Fill in the fields:
 - **First Name:** Ragu
 - **Last Name:** Raj
 - **Alias:** (Enter an alias)
 - **Email:** (Enter your personal email)
 - **Username:** (Format: text@text.text)
 - **Nickname:** (Enter a nickname)
 - **Role:** Worker
 - **User License:** Salesforce Platform
 - **Profile:** Standard Platform User
4. Click **Save**.



10. Permission Sets

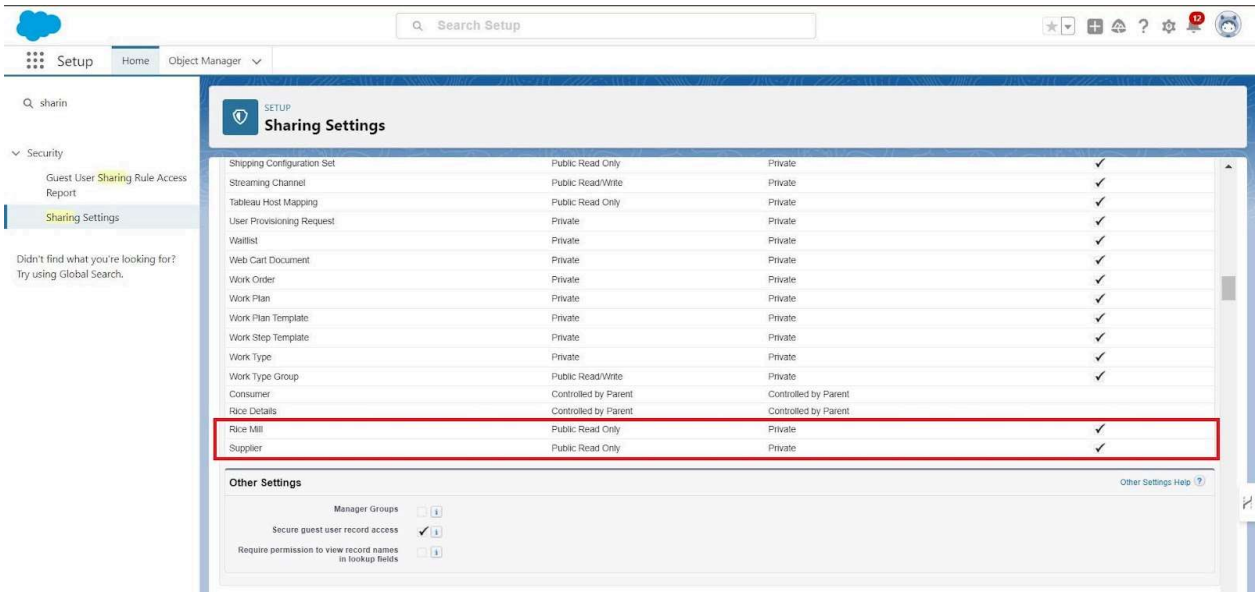
A **permission set** is a collection of settings and permissions that grants users access to various tools and functions. They extend functional access without modifying user profiles and are the recommended method for managing user permissions.

1. Creating OWD Settings

To create OWD settings:

1. Go to **Setup** and type **Sharing Settings** in the Quick Find box.
2. Click **Edit**.
3. Scroll down and change the default internal access to **Public Read-Only** for the Rice Mill and Supplier objects.
4. Click **Save**.

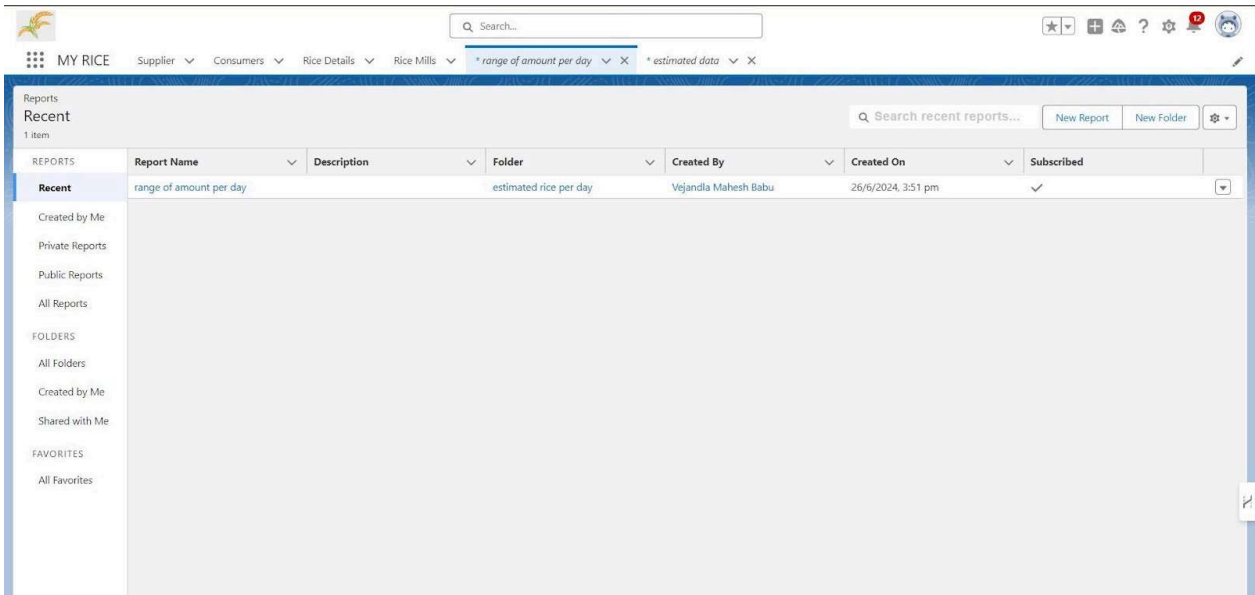
Note: Each profile has its own access. In this case, roles are structured so that the owner can see employer and worker records, while the employer can see worker records.



11. Report

1. Create Report

1. **Prepare Data:** Create the latest **10** records in the Consumer object, filling in every field.
2. Go to the app and click on the **Reports** tab.
3. Click **New Report**.
4. Search for the report type **Rice Mill with Consumers**, click on it, and then click **Start Report**.
5. In the Outline pane, select the following fields for the columns:
 - Consumer Name
 - Rice Type
 - Rice Price/kg
 - Mode of Payments
 - Amount Paid
6. Remove unnecessary fields.
7. In the **GROUP ROWS** section, select:
 - Rice Taken by Shops
8. Click **Save and Run**, naming the report **Range of Amount per Day** and saving it.



2. Sharing Report to Owner

1. Click the **Edit** dropdown and select the **Subscribe** option.
2. Follow the prompts as per the provided image.
3. In the **Run Report** section, select **Another Person** and choose your personal account or the intended recipient.
4. Click **Save**.

Note: The owner will receive daily email notifications of the Rice Mill report, allowing them to view all data remotely.

3. Create a Report Folder

1. Click on the **App Launcher** and search for **Reports**.
2. Double-click on the report; the **Reports** tab will auto-populate in the navigation bar.
3. Click on the **Reports** tab and select **New Folder**.
4. Enter the folder label as **Estimated Rice per Day** (the unique name will auto-populate).
5. Click **Save**.

Move Report to the New Folder

1. Navigate to the **App Launcher** and click on **Reports**.
2. Click **All Reports**.
3. Select the **Range of Amount per Day** report and click **Move**.
4. Choose the **Estimated Rice per Day** folder and confirm the selection.

Note: To view the report, go to **Reports > All Folders > Estimated Rice per Day**; your report will

be listed there.

Rice taken by shops	Consumer Name	Rice Type	rice price/kg	Mode of payment	Amount Paid
150 (2)	saleempatna	basmati	10	Cash	1,500.00
	maheshiv	basmati	10	Net banking	1,500.00
Subtotal			10		3,000.00
250 (1)	kumariya	normal rice	12	Credit card	3,000.00
Subtotal			12		3,000.00
300 (1)	mahib	normal rice	11	UPI	3,300.00
Subtotal			11		3,300.00
350 (1)	rowanj	normal rice	12	UPI	4,200.00
Subtotal			12		4,200.00
400 (1)	arunjain	basmati	11	Net banking	4,400.00
Subtotal			11		4,400.00
600 (2)	nanik	basmati	10	Net banking	6,000.00
	anilkumar	normal rice	12	Net banking	7,200.00
Subtotal			22		13,200.00
Total (8)			33		31,100.00

12. Dashboards

Dashboards provide a visual representation of changing business conditions, enabling decision- making based on real-time data from reports. They help users identify trends, quantify data, and measure the impact of their activities. Before creating, reading, or sharing dashboards, it's essential to understand the basic principles of dashboards.

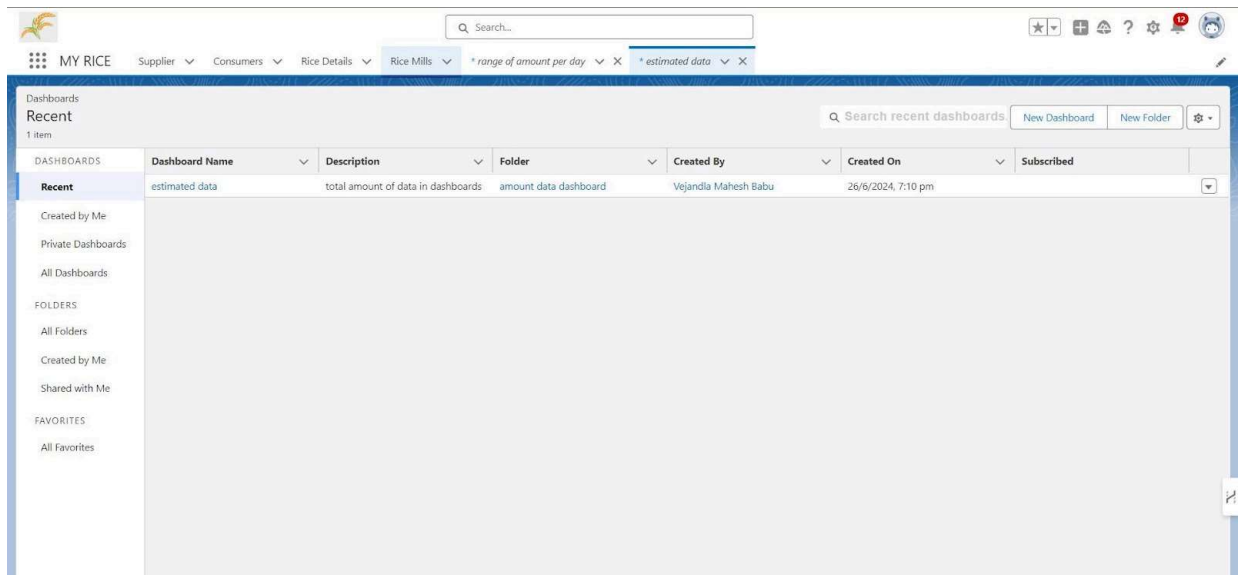
1. Create Dashboard Folder

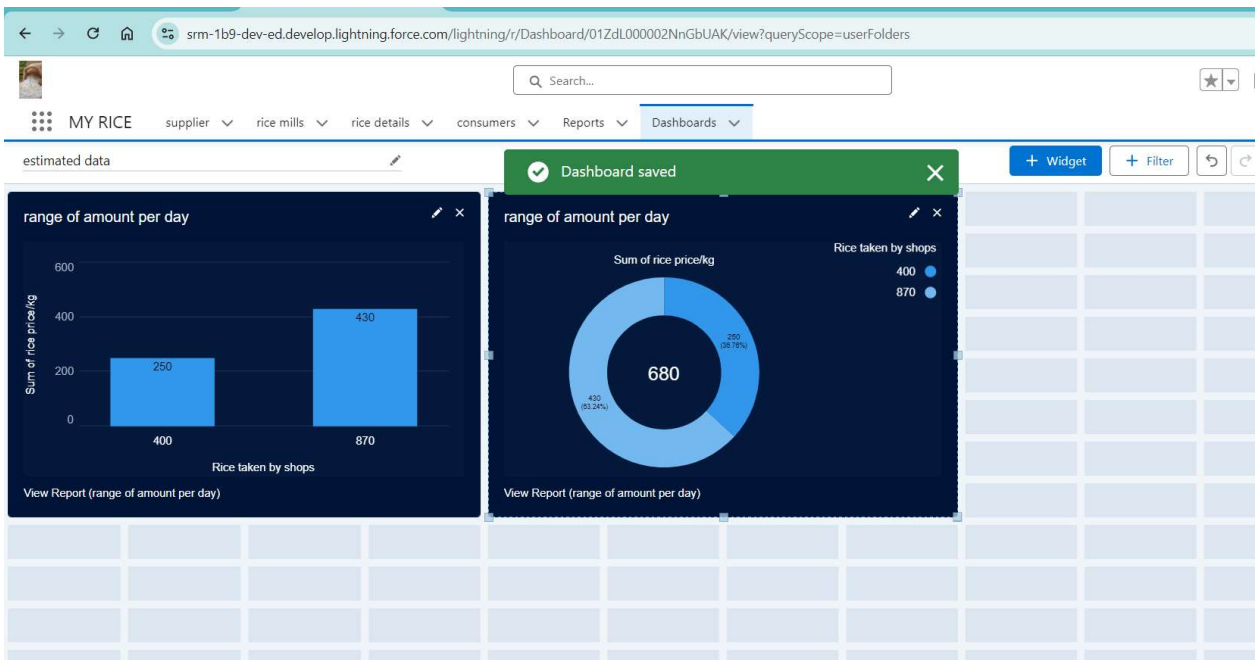
1. Click on the **App Launcher** and search for **Dashboards**.
2. Click on the **Dashboards** tab.
3. Select **New Folder** and enter the folder label as **Amount Data Dashboard** (the unique name will auto-populate).
4. Click **Save**.

2. Create Dashboard

1. Go to the app and click on the **Dashboards** tab.
2. Enter a **Name** for the dashboard and select the folder you created, then click **Create**.
3. Click **Add Component**.
4. Select a report and click **Select**.
5. Configure the first component:

- . **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
6. Click **Add**.
7. Repeat the above steps for the second component:
- . **Display as:** Donut Chart
 - . **Sort by:** Sum of Amount
 - . **Title:** Range of Amount per Day
 - . **Component Theme:** Dark
8. Click **Add**.
9. Click **Save** and then **Done**.





13. APEX

Apex is a strongly typed, object-oriented programming language similar to Java, allowing developers to execute flow and transaction control statements on the Lightning platform server. It enables the addition of business logic to system events, such as button clicks and record updates. Apex can be initiated by web service requests and triggers.

Key Concepts

- **Classes:** In Apex, classes serve as templates from which objects are created. You can define, instantiate, and extend classes, as well as work with interfaces and properties.
- **Objects:** An object is an instance of a class that can access all the properties (variables and methods) defined in that class.

1. Creating an Apex Class (ConsumerRecord)

1. **Log In:** Log in to your Salesforce account and click the gear icon in the top right corner.
2. **Access Developer Console:** Select **Developer Console** from the dropdown.

3. Create New Class:

- Click on **File > New > Apex Class**.
- Enter the class name **ConsumerRecord**.

4. Code Snippet:

Write the code to define the ConsumerRecord class and include a method for sending email notifications to consumers.

5. Save the Class.

2. Creating an Apex Trigger

1. **Log In:** While still in your Salesforce account, click on the gear icon in the top right corner.
2. **Access Developer Console:** Click on **Developer Console** to open a new console window.

3. Create New Trigger:

- . Click on the **File** menu in the toolbar and select **New > Trigger**.
- . Enter the trigger name and specify the object to be triggered.

4. Trigger Syntax:

The syntax for creating a trigger is as follows:

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

5. Trigger Code:

Write the trigger to execute after a consumer record is inserted and call the method to send email notifications.

6. Save the Trigger.

BY

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