

# A CRM APPLICATION FOR WHOLESALE RICE MILL

## Project Description:

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

## Features and Functionality:

### ➤ Reporting and Dashboards:

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

### ➤ A roll-up summary field:

This is a field that summarizes data from a child object to a parent object that shares a master-detail relationship. 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.

### ➤ A cross-object formula field:

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

### ➤ Validation rules:

Validation rules also include an error message to display to the user when the rule returns a value of "True" due to an invalid value. So, In this project I gave Isblank formula. Isblank formula is used to verify whether it is blank it shows error.

➤ **Permission sets:**

Organization Wide Defaults(OWD) in salesforce is the baseline level of access that the most restricted user should have. Organizational Wide Defaults are used to restrict access. But in our case we created roles and given the roles in such a way that the owner can see employer and worker records, and the employer can see the worker records.

## Milestone1- Introduction to Salesforce

### 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 Developer Account

Creating a developer org in salesforce.

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

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name

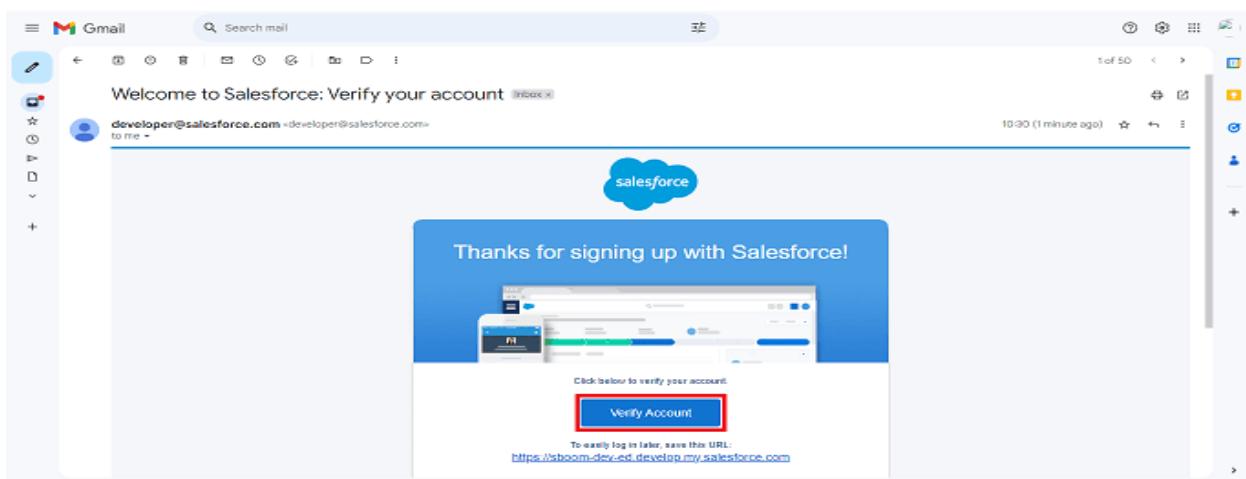
5. County : India
6. PostalCode : pin code
7. Username : should be a combination of your name and company

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

Click on sign me up after filling these.

## Activity 2: Account Activation

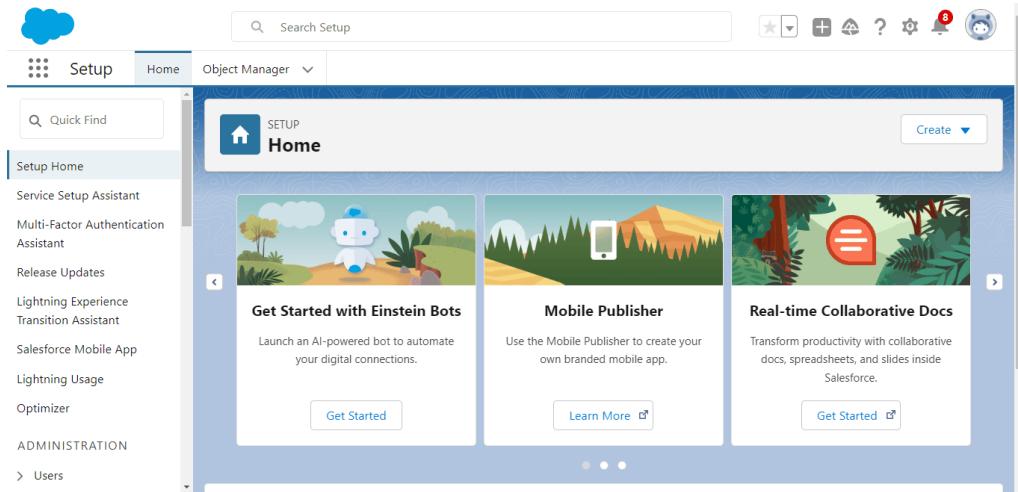
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

A screenshot of a "Change Your Password" form. The title is "Change Your Password". It instructs the user to "Enter a new password for lead@sb.com. Make sure to include at least: 8 characters, 1 letter, 1 number". There are two input fields: "New Password" and "Confirm New Password", both containing redacted text. Below these is a "Security Question" section with a dropdown menu showing "In what city were you born?" and an "Answer" input field containing "asdfghjkl". A large red box highlights the "New Password", "Confirm New Password", "Security Question", and "Answer" fields. At the bottom is a blue "Change Password" button.

4. Then you will redirect to your salesforce setup page.



## Milestone 2 - Object

### What Is an Object?

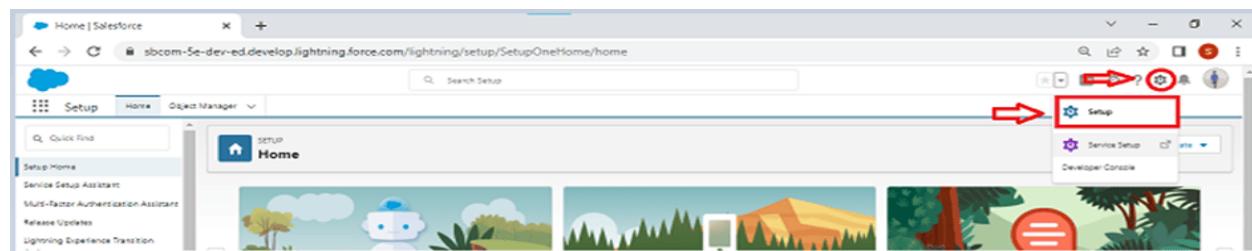
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

Salesforce objects are of two types:

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

### To Navigate to Setup page:

Click on gear icon -click setup.

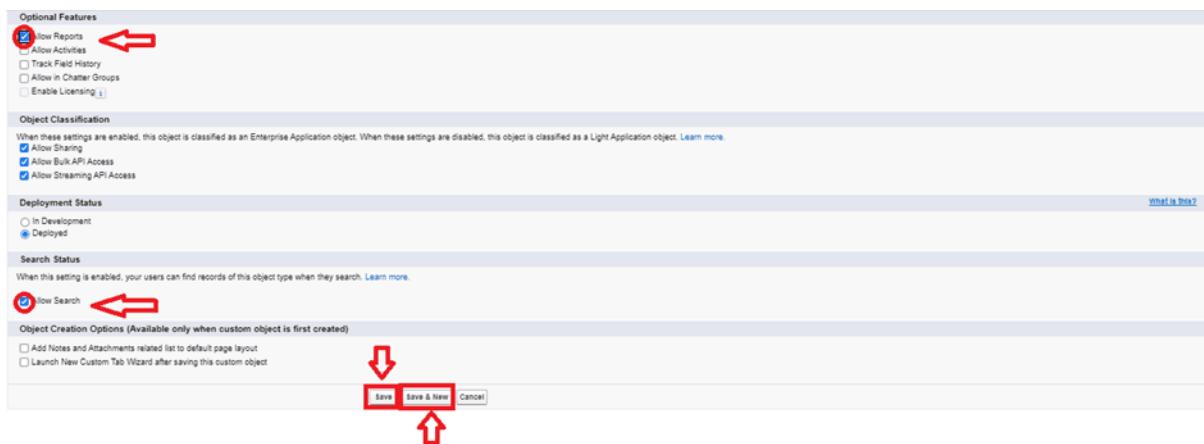


## To create an object:

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



2. On the Custom object defining page:
3. Enter the label name, plural label name, click on Allow reports, Allow search.





4. Click on Save.

## Activity 1: Create Supplier Object

To create an object:

1. From the setup page >> Click on Object Manager>> Click on Create>>Click on Custom Object.
  1. Enter the label name>>supplier
  2. Plural label name>>supplier
  3. Enter Record Name Label and Format
    - Record Name >> supplier Name
    - Data Type>>Text
2. Click on Allow reports and Track Field History and allow search
3. Allow search >> Save.

The screenshot shows the Salesforce Setup interface. At the top, there's a blue header bar with the Salesforce logo, a search bar labeled 'Search Setup', and various navigation icons. Below the header, the main content area has a dark blue header titled 'SETUP > OBJECT MANAGER'. Underneath, the object name 'supplier' is displayed. On the left, a sidebar lists several tabs: 'Details' (which is selected), 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', and 'Related Lookup Filters'. The main right-hand panel is titled 'Details' and contains sections for 'Description', 'API Name' (set to 'supplier\_\_c'), 'Custom' (with a dropdown arrow), 'Singular Label' (set to 'supplier'), 'Plural Label' (set to 'supplier'), and 'Enable Reports' (checkbox checked). There are also sections for 'Track Activities', 'Track Field History', 'Deployment Status' (set to 'Deployed'), 'Help Settings', and a link to 'Standard salesforce.com Help Window'. At the bottom right of the main panel are 'Edit' and 'Delete' buttons.

## Activity 2: Create Rice mill Object

To create an object:

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

**rice mill**

**Details**

Description

API Name  
rice\_mill\_c

Custom  
✓

Singular Label  
rice mill

Plural Label  
rice mills

Enable Reports  
✓

Track Activities

Track Field History  
✓

Deployment Status  
Deployed

Help Settings

Standard Salesforce.com Help Window

## Activity 3: Create consumer Objects

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

1. Use these display formats for the consumer
  - label name >> consumer
  - Plural label name >> consumers
  - Display Format >> consumers-{000}
  - Starting number >> 1

**consumer**

**Details**

Description

API Name  
consumer\_c

Custom  
✓

Singular Label  
consumer

Plural Label  
consumers

Enable Reports  
✓

Track Activities

Track Field History  
✓

Deployment Status  
Deployed

Help Settings

Standard Salesforce.com Help Window

## Activity 4: Create rice details Objects

1. Use these display format for the rice details
  - label name >> rice details
  - Plural label name >> rice details

- Display Format >> rice-{000}
- Starting Number >>1

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main area displays the 'rice details' object configuration. On the left, a sidebar lists various tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The 'Details' tab is active, showing the following configuration:

Setting	Value
Description	
API Name	rice_details__c
Custom	✓
Singular Label	rice details
Plural Label	rice details
Enable Reports	
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons 'Edit' and 'Delete' are located at the top right of the main configuration area.

## Milestone 2 - Tabs

### What is Tab?

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

### Types of Tabs:

- **Custom Tabs:**

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

- **Web Tabs:**

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

- **Visual force Tabs:**

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

- **Lightning Component Tabs:**

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

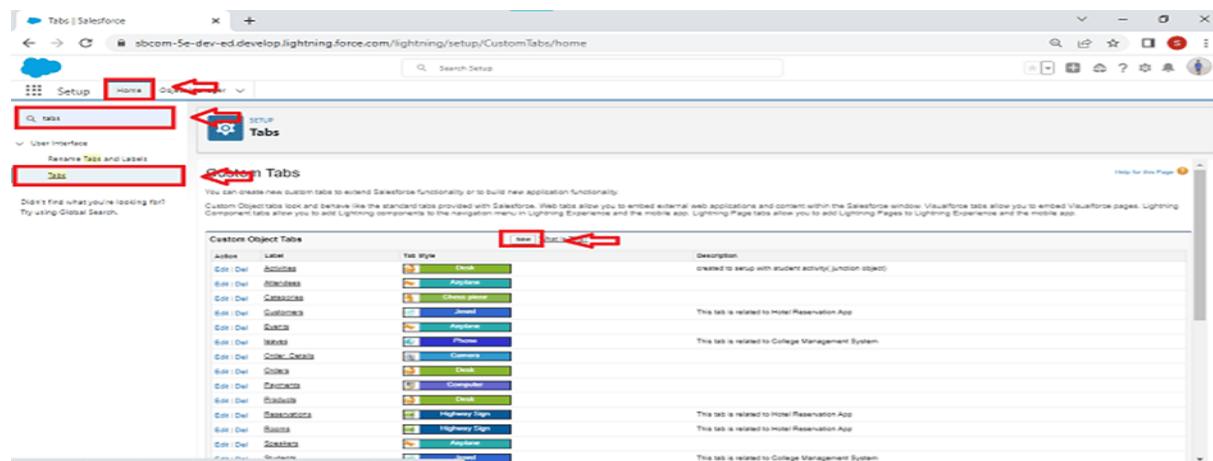
- **Lightning Page Tabs:**

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

## Activity 1: Creating a Custom Tab

To create a Tab:(supplier)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)



2. Select Object(supplier) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.

**SETUP**

## Tabs

Edit Custom Object Tab  
suppliers

Fill in the fields below to define the custom tab.

**Custom Tab Definition Edit**

**Custom Object Tab Information**

Tab Label: suppliers  
Object: supplier  
Tab Style:

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.  
Splash Page Custom Link:

Enter a short description.

Description:

**Tab Style Selector**

**Create your own style**

**Hide styles which are used on other tabs**

	Airplane		Alarm clock		Apple		Balls
	Bank[1]		Bell		Big top		Boat[1]
	Books		Bottle		Box		Bridge
	Building		Building Block		Caduceus		Camera
	Can		Car		Castle		CD/DVD
	Cell phone		Chalkboard		Chess piece		Chip
	Circle		Compass		Computer		Credit card
	CRT TV		Cup		Desk[1]		Diamond
	Dice		Factory		Fan		Flag
	Form		Gears		Globe		Guitar
	Hammer		Hands		Handsaw		Headset
	Heart[1]		Helicopter		Hexagon		Highway Sign
	Hot Air Balloon		Insect		IP Phone		Jewel
	Keys		Laptop		Leaf		Lightning

**Step 3. Add to Custom Apps**

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	<input type="checkbox"/> Include Tab
Platform (standard_Platform)	<input type="checkbox"/>
Sales (standard_Sales)	<input type="checkbox"/>
Service (standard_Service)	<input type="checkbox"/>
Marketing (standard_Marketing)	<input type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>

Step 3. Add to Custom Apps

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	<input type="checkbox"/> Include Tab
Platform (standard_Platform)	<input type="checkbox"/>
Sales (standard_Sales)	<input type="checkbox"/>
Service (standard_Service)	<input type="checkbox"/>
Marketing (standard_Marketing)	<input type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>

Analytics Studio (standard_Insights)	<input type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard_LightningService)	<input type="checkbox"/>
Sales (standard_LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard_LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard_SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard_QueueManagement)	<input type="checkbox"/>
Bolt Solutions (standard_LightningBolt)	<input type="checkbox"/>
Data Manager (standard_DataManager)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard_LightningScheduler)	<input type="checkbox"/>

Append tab to user's existing personal customizations

Previous Save Cancel

Setup

Search Setup

Home Object Manager

Custom tab

SETUP Tabs

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	Tab Style	
Object	supplier	Splash Page Custom Link	
Description		Box	
Created By	Leela Galla, 24/09/2024, 10:08 am	Modified By	Leela Galla, 24/09/2024, 10:08 am

Help for this Page ?

Feature Settings

- Analytics
- Tableau
  - Tableau Embedding

User Interface

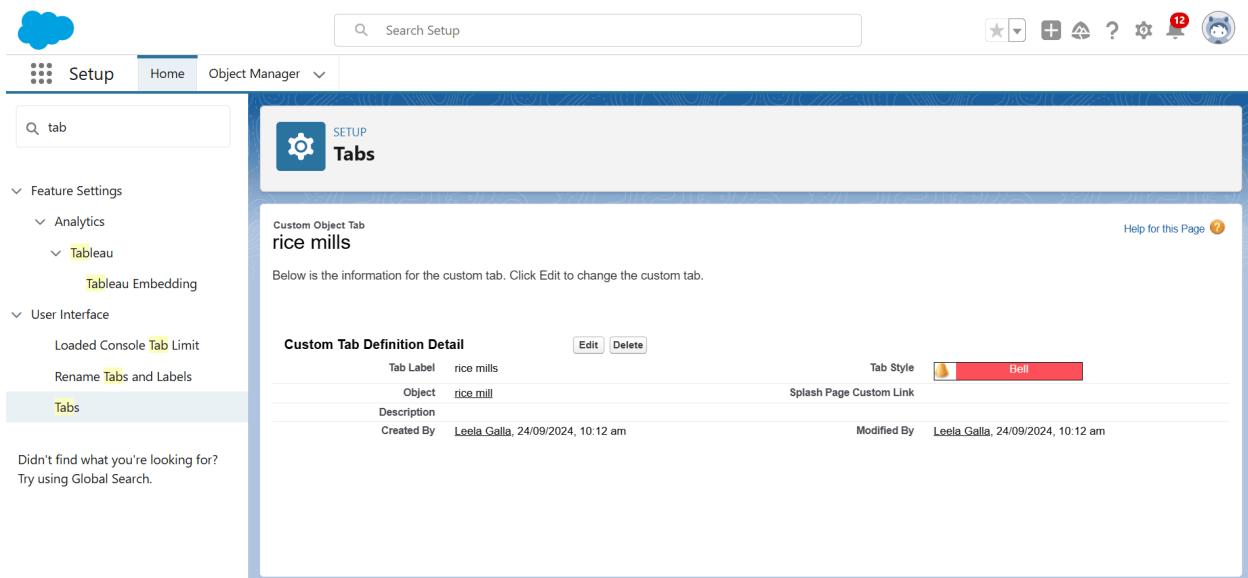
- Loaded Console Tab Limit
- Rename Tabs and Labels
- Tabs

Didn't find what you're looking for?  
Try using Global Search.

## Activity 2: Creating Remaining Tabs

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

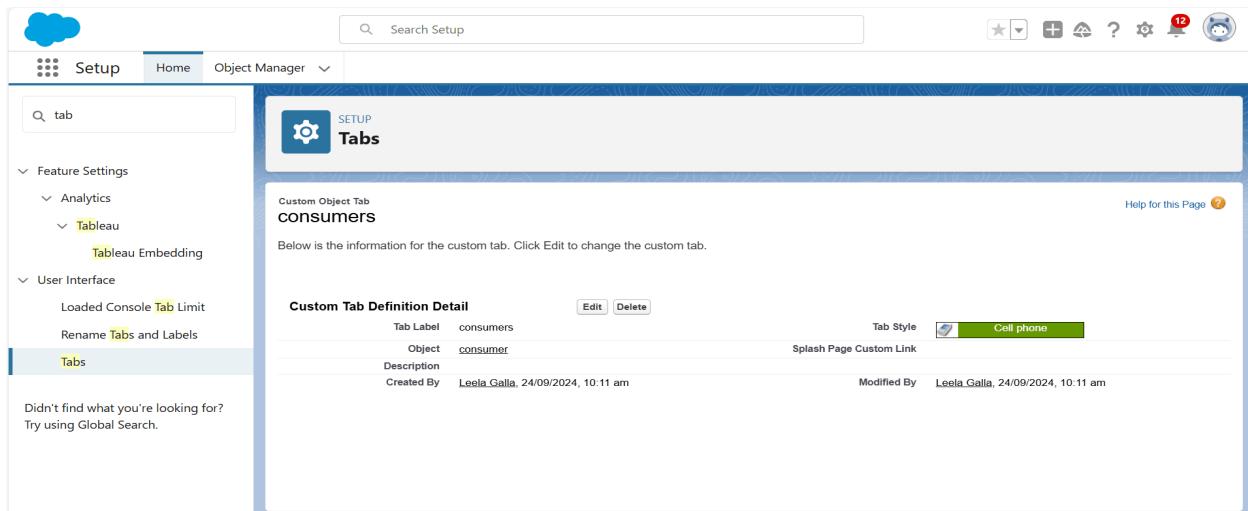
## Tabs for rice mill



The screenshot shows the Salesforce Setup interface. The left sidebar has sections like Feature Settings (Analytics, Tableau, Tableau Embedding), User Interface (Loaded Console Tab Limit, Rename Tabs and Labels, Tabs), and a search bar. The main content area is titled 'SETUP Tabs' and shows a 'Custom Object Tab' named 'rice mills'. It includes a 'Custom Tab Definition Detail' table with columns for Tab Label (rice mills), Object (rice\_mill), Description (Leela\_Galla, 24/09/2024, 10:12 am), Tab Style (Bell), and Splash Page Custom Link. A note says '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	Leela_Galla, 24/09/2024, 10:12 am
Created By	Leela_Galla, 24/09/2024, 10:12 am
Modified By	Leela_Galla, 24/09/2024, 10:12 am
Tab Style	Bell
Splash Page Custom Link	

## Tabs for consumer



The screenshot shows the Salesforce Setup interface. The left sidebar has sections like Feature Settings (Analytics, Tableau, Tableau Embedding), User Interface (Loaded Console Tab Limit, Rename Tabs and Labels, Tabs), and a search bar. The main content area is titled 'SETUP Tabs' and shows a 'Custom Object Tab' named 'consumers'. It includes a 'Custom Tab Definition Detail' table with columns for Tab Label (consumers), Object (consumer), Description (Leela\_Galla, 24/09/2024, 10:11 am), Tab Style (Cell phone), and Splash Page Custom Link. A note says 'Below is the information for the custom tab. Click Edit to change the custom tab.'

Custom Tab Definition Detail	
Tab Label	consumers
Object	consumer
Description	Leela_Galla, 24/09/2024, 10:11 am
Created By	Leela_Galla, 24/09/2024, 10:11 am
Modified By	Leela_Galla, 24/09/2024, 10:11 am
Tab Style	Cell phone
Splash Page Custom Link	

## Tabs for rice details

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Object Manager', the 'Tabs' section is selected. A search bar at the top finds 'rice details'. The main content area displays the 'Custom Tab Definition Detail' for 'rice details'. The tab has a blue 'Bottle' style. It was created by 'Leela\_Galla' on '24/09/2024, 10:11 am' and modified by the same user on '24/09/2024, 10:11 am'.

Tab Label	rice details	Tab Style	Bottle
Object	rice_details	Splash Page Custom Link	
Description			
Created By	Leela_Galla, 24/09/2024, 10:11 am	Modified By	Leela_Galla, 24/09/2024, 10:11 am

## Milestone 4 - The Lightning App

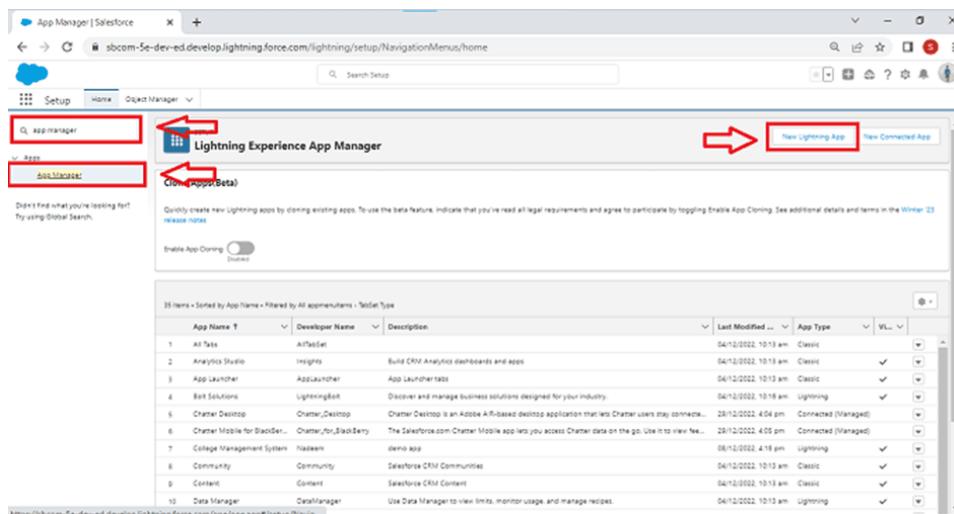
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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

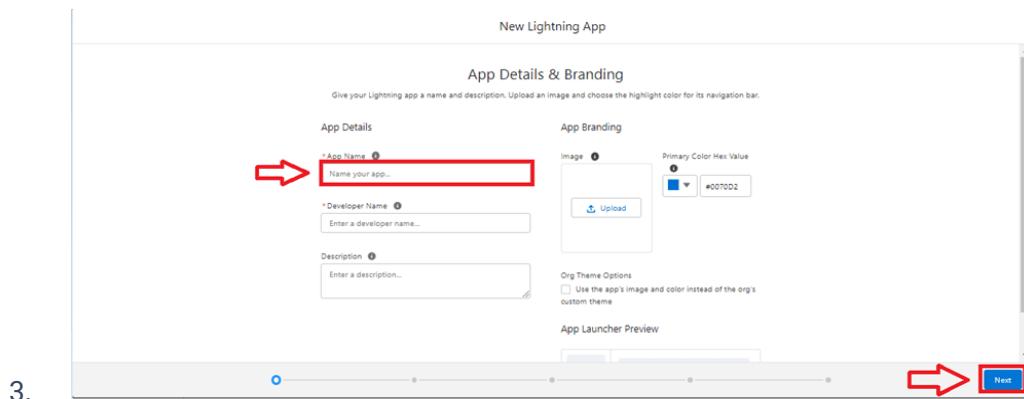
### Activity 1: Create a Lightning App

To create a lightning app page:

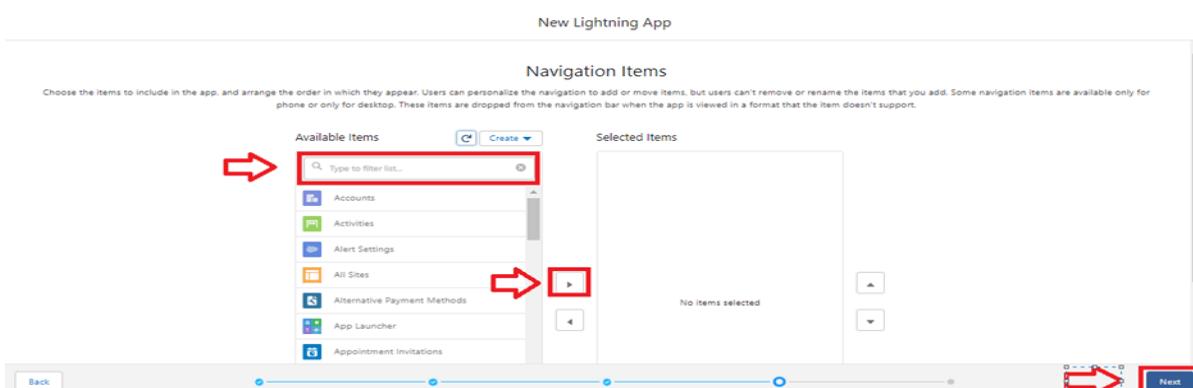
1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.



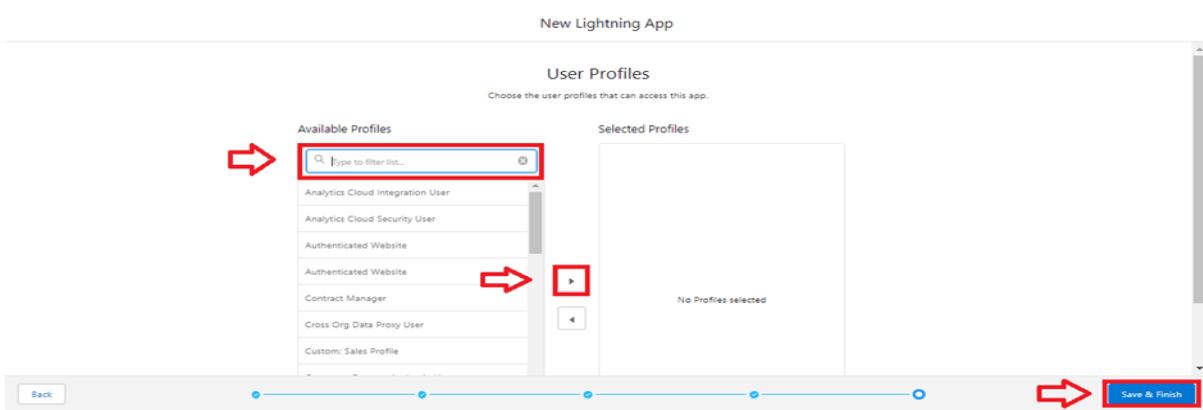
2. Fill the app name in app details as MY RICE >> Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.



4. Upload a photo that is related to your app.  
5. To add Navigation Item:



2. Select the items (supplier, rice mill, consumer, Rice details ) from the search bar and move it using the arrow button >> Next.
3. To Add User Profiles:



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

Lightning App Builder | App Settings | Pages | MY RICE | Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Details & Branding

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

\* App Name

\* Developer Name

Description

App Branding

Image

Primary Color Hex Value  #0070D2

Clear

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

App Launcher Preview

MY RICE

# Milestone 5 - Fields

## What are Fields?

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

Types of Fields:

1. Standard Fields
2. Custom Fields

### Standard Fields:

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

1. Created By
2. Owner
3. Last Modified
4. Field Made During object Creation

### Custom Fields:

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

## Activity 1: Creating the number field in rice details object

Creating the number field in rice details object

1. Go to the setup page >> click on object manager >> From dropdown click edit for rice details object

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Name', and 'Object Manager'. A red arrow points to the 'Object Manager' button. Below it, a search bar says 'Search Setup'. On the right, there are buttons for 'Edit', 'New', 'Delete', 'Help', and 'More'. Another red arrow points to the 'New' button. The main area is titled 'Object Manager' with a sub-header '2 items, Sorted by Label'. It lists two objects: 'Student' (Custom Object, College Management System) and 'Student Activity' (Custom Object, created for the purpose of junction object). The 'Student' row has a red box around its 'Label' field.

2. Click on fields & relationship >> click on New.

The screenshot shows the 'Fields & Relationships' page for the 'Supplier' object. At the top, there's a breadcrumb 'SETUP > OBJECT MANAGER Supplier'. On the left, a sidebar lists various setup options like Page Layouts, Lightning Record Pages, etc., with 'Fields & Relationships' selected. A red arrow points to this selection. The main area is titled 'Fields & Relationships' with a sub-header '5 items, Sorted by Field Label'. It lists five fields: 'Created By', 'Last Modified By', 'Owner', 'Sum of Fuel supplied', and 'supplier Name'. A red arrow points to the 'New' button at the top right. The table columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'.

Select Data type as "Number" and click Next.

Given the Field Label as " rice distributed " and length as " 5 ".

The screenshot shows the 'Step 2. Enter the details' screen for creating a new field. At the top, it says 'Step 2 of 4'. There are 'Previous', 'Next', and 'Cancel' buttons. The form fields include:

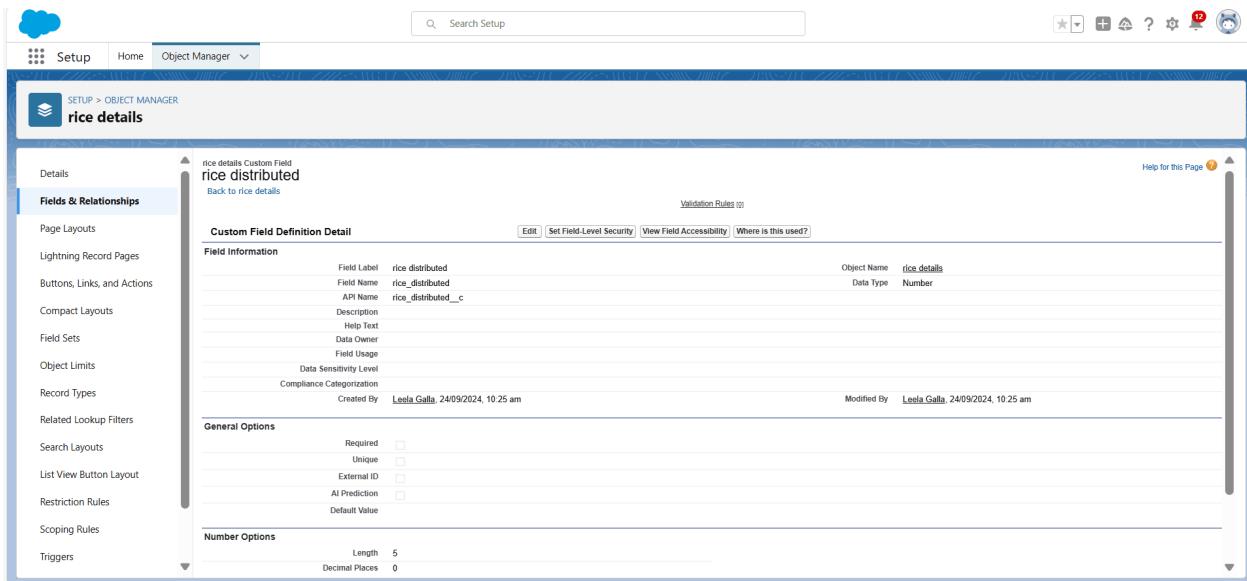
- Field Label:** A text input field containing 'rice distributed'. A red box and an upward arrow point to this field.
- Length:** A numeric input field containing '18'. A red box and an upward arrow point to this field.
- Decimal Places:** A numeric input field containing '0'. A red box and an upward arrow point to this field.
- Field Name:** A text input field.
- Description:** A large text area.
- Help Text:** A large text area.

Below these fields are several checkboxes:

- Required:**  Always require a value in this field in order to save a record
- Unique:**  Do not allow duplicate values
- External ID:**  Set this field as the unique record identifier from an external system
- AI Prediction:**  Use this field to store AI prediction scores

At the bottom, there's a checkbox for 'Auto add to custom report type' with the option ' Add this field to existing custom report types that contain this entity'.

5. Field Name will be auto populated, and click on Next- Next > Save.



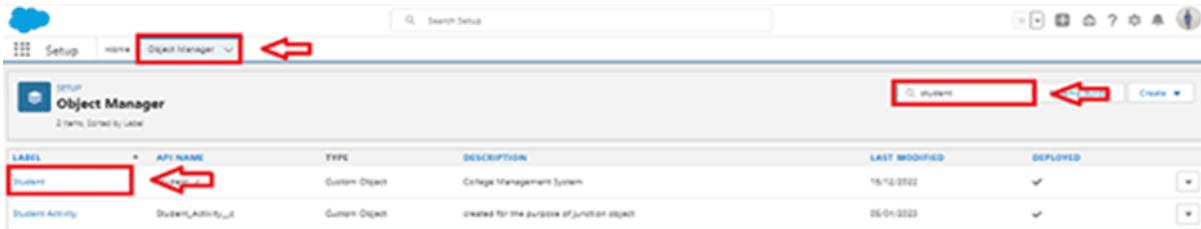
## Activity 2: Creating Junction Object

A Junction object is a custom object that serves as a bridge between two related objects in a many-to-many relationship. It allows you to create a relationship between records of two different objects by creating a many-to-many relationship model.

Creating junction object as rice details with supplier& rice mill

To create junction object

1. Go to the setup page >> click on object manager >> From drop down click edit for rice details object



2. Click on fields & relationship - click on New.

SETUP > OBJECT MANAGER  
Supplier

**Fields & Relationships**

5 Items, Sorted by Field Label

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 Fuel supplied	Sum_of_Fuel_supplied__c	Roll-Up Summary (SUM Fuel details)		
supplier Name	Name	Text(80)	✓	▼

3. Select “Master-Detail relationship” as data type and click Next.

Specify the type of information that the custom field will contain.

**Data Type**

Select one of the data types below.

- None Selected
- Auto Number
- Formula
- Roll-Up Summary (1)
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship

**Master-Detail Relationship**

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

**External Lookup Relationship**

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

4. Select the related object “ supplier ” and click next.

Buyer  
**New Relationship**

**Step 2. Choose the related object**

Select the other object to which this object is related

Related To

Help for this Page (1)

**Step 2 of 6**

Previous Next Cancel

5. Give Field Label as “supplier Name” and click Next.

6. Next >> Next >> Save & New.

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named 'supplier Name' is being created for the 'rice details' object. The 'Field & Relationships' tab is selected. The 'Custom Field Definition Detail' section shows the following details:

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	Leela_Galla, 24/09/2024, 10:28 am	Modified By	Leela_Galla, 24/09/2024, 11:33 am

The 'Master-Detail Options' section includes:

Related To	supplier	Child Relationship Name	rice_details
Related List Label	rice details		
Sharing Setting	ReadWrite: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		

7. Follow the same steps from 1 to 3.

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named 'rice mill 1' is being created for the 'rice details' object. The 'Field & Relationships' tab is selected. The 'Custom Field Definition Detail' section shows the following details:

Field Label	rice mill 1	Object Name	rice_details
Field Name	rice_mill	Data Type	Master-Detail
API Name	rice_mill__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Leela_Galla, 24/09/2024, 10:30 am	Modified By	Leela_Galla, 24/09/2024, 10:30 am

The 'Master-Detail Options' section includes:

Related To	rice mill	Child Relationship Name	rice_details
Related List Label	rice details		
Sharing Setting	ReadWrite: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		

8. Select the related object "rice mill" and click Next.

9. Give Field Label as "rice mill 1(one)" and click Next.

10. Next >> Next >> Save.

## Activity 3: Creating a Master-Detail Relationship

Master-Detail Relationship is a type of relationship between two objects where the master object controls certain behaviors and settings of the detail object. Here are a few use cases that demonstrate the use of master-detail relationships

Creating Master-Detail Relationship between consumer& rice mill Object

To Create a Master-Detail relationship

1. Go to the setup page >> click on object manager >> From dropdown click edit for consumer object.
2. Click on fields & relationship >> click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. Select the related object “rice mill”.
5. Give Field Label as “rice mill name” and click Next.
6. Next >> Next >> Save.

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

- Header:** Search Setup, various icons (star, plus, etc.), and a help link.
- Breadcrumbs:** SETUP > OBJECT MANAGER > consumer
- Left Sidebar:** 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.
- Central Content:**
  - Field Information:** Field Label: rice mill name, Field Name: rice\_mill\_name, API Name: rice\_mill\_name\_c, Description: Help Text, Data Owner: Field Usage, Data Sensitivity Level: Standard, Compliance Categorization: Standard, Created By: Leela\_Galla, 24/09/2024, 10:32 am, Modified By: Leela\_Galla, 24/09/2024, 11:54 am.
  - Master-Detail Options:** Related To: rice\_mill, Related List Label: consumers, Child Relationship Name: consumers, Sharing Setting: Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
- Right Side:** Help for this Page link.

## Activity 4: Creating the Roll-up Summary

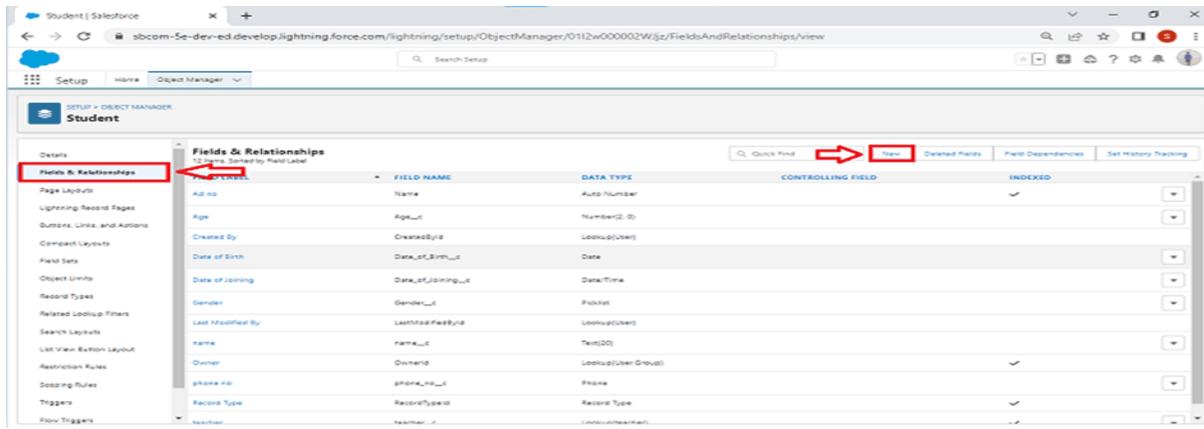
A roll-up summary field is a field that summarizes data from a child object to a parent object that shares a master-detail relationship. Roll-up summary fields can use the COUNT, SUM, MIN, and MAX functions. For example, you could use a roll-up summary field to display the total value (amount of rice supplied) from rice details on a related supplier.

## Creating the Roll-up summary field on supplier & rice mill Objects.

1. Go to setup >> click on Object Manager >> type object name(supplier) in search bar >> click on the object.



2. Now click on "Fields & Relationships" >> New



3. Select the data type as "Roll-up summary ",and click Next.

Specify the type of information that the custom field will contain.

**Data Type**

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:  
• The relationship field is required on all detail records.

4. Give the Field label as “sum of rice distributed”, Field Name will be Auto generated, and click Next.

**Step 2. Enter the details** **Step 2 of 5**

Help for this Page ?

Previous Next Cancel

Field Label

Field Name

Description

Help Text

Auto add to custom report type  Add this field to existing custom report types that contain this entity

Previous Next Cancel

5. Select the summarized object as “rice details”.
6. Select the Roll-up type as “sum”.
7. Select the field to aggregate as “rice distributed”, and click Next >>Next >>Save.

**Step 3. Define the summary calculation** **Step 3 of 5**

Previous Next Cancel

**Select Object to Summarize** \*

Master Object seller  
Summarized Object

**Select Roll-Up Type**

COUNT  
 SUM  
 MIN  
 MAX

Field to Aggregate

**Filter Criteria**

All records should be included in the calculation  
 Only records meeting certain criteria should be included in the calculation

Previous Next Cancel

**Custom Field Definition Detail**

Field Information		Object Name	
Field Label	sum of rice distributed	Object Name	supplier
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	Leela_Galla	Created Date	24/09/2024, 10:35 am
Modified By	Leela_Galla	Modified Date	24/09/2024, 10:52 am

**Roll-Up Summary Options**

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

9. Follow the same steps for the rice mill Object from 1 to 3
10. Give the Field label as " rice distributed to shops ",Field Name will be Auto generated, and click Next.
11. Select the summarized object as " rice details ".
12. Select the Roll-up type as "sum".
13. Select the field to aggregate as " rice distributed ", and click Next >> Next >> Save.

**Custom Field Definition Detail**

Field Information		Object Name	
Field Label	rice distributed to shops	Object Name	rice_mill
Field Name	rice_distributed_to_shops		
API Name	rice_distributed_to_shops_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Leela_Galla	Created Date	24/09/2024, 10:37 am
Modified By	Leela_Galla	Modified Date	24/09/2024, 11:39 am

**Roll-Up Summary Options**

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

14. Note :create the field as " rice taken by shops in kgs" using number datatype in consumer object

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named 'rice taken by shops in kgs' is being created for the 'consumer' object. The field is defined with the following details:

Field Label	rice taken by shops in kgs	Object Name	consumer
Field Name	rice_taken_by_shops_in_kgs	Data Type	Number
API Name	rice_taken_by_shops_in_kgs_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Leela_Galla, 24/09/2024, 10:42 am	Modified By	Leela_Galla, 24/09/2024, 11:02 am

15. Follow the same steps for the rice mill Object from 1 to 3
16. Give the Field label as " rice taken ",Field Name will be Auto generated, and click Next.
17. Select the summarized object as " consumer".
18. Select the Roll-up type as "sum".
19. Select the field to aggregate as " rice taken by shops ", and click Next >> Next >> Save.

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named 'rice taken' is being created for the 'rice mill' object. The field is defined with the following details:

Field Label	rice taken	Object Name	rice_mill
Field Name	rice_taken		
API Name	rice_taken_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Leela_Galla, 24/09/2024, 10:44 am	Modified By	Leela_Galla, 24/09/2024, 11:41 am

Below the main field definition, there are 'Roll-Up Summary Options' set to 'SUM'.

## Activity 5: Creating Fields in Objects

Creating the number field in rice details object

1. Go to the setup page >> click on object manager >> From drop down click edit for rice details object.
2. Click on fields & relationship >> click on New.

The screenshot shows the Salesforce Object Manager interface for the 'Supplier' object. The left sidebar lists various configuration options like Details, Page Layouts, Lightning Record Pages, etc. The main area is titled 'Fields & Relationships' and contains a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table includes standard fields like Created By, Last Modified By, Owner, and a custom field 'Sum of Fuel supplied'. A red box highlights the 'Fields & Relationships' tab in the sidebar, and another red box highlights the 'New' button in the top right of the main grid.

3. Select Data type as “number” and click Next.
4. Given the Field Label as “ supplier name ” and length as “ 5

This screenshot shows the 'Step 2. Enter the details' screen for creating a new field. The 'Field Label' input field is highlighted with a red box. Below it, a note says: 'Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".' The 'Length' input field is highlighted with a red box and contains the value '18'. To its right, the 'Decimal Places' input field is highlighted with a red box and contains the value '0'. Below these fields are 'Field Name', 'Description', and 'Help Text' input fields, each with a red box highlighting the first character. At the bottom, there are several checkboxes: 'Required', 'Unique', 'External ID', 'AI Prediction', and 'Auto add to custom report type'. The 'Required' checkbox has a red box around it. The 'Next' button in the top right corner is highlighted with a red box.

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

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named 'supplier name' is being created for the 'rice details' object. The field is defined as a Number type with a length of 5. It has the API name 'supplier\_name\_\_c'. The field label is 'supplier name'.

Field Information	Value
Field Label	supplier name
Field Name	supplier_name
API Name	supplier_name__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Leela Galla, 24/09/2024, 10:58 am
Modified By	Leela Galla, 24/09/2024, 2:49 pm

## Activity 6: Creating Fields in rice mill Objects

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

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named 'rice price/kg' is being created for the 'rice mill' object. The field is defined as a Number type with a length of 5. It has the API name 'rice\_price\_kg\_\_c'. The field label is 'rice price/kg'.

Field Information	Value
Field Label	rice price/kg
Field Name	rice_price_kg
API Name	rice_price_kg__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Leela Galla, 24/09/2024, 11:00 am
Modified By	Leela Galla, 24/09/2024, 11:00 am

## **Activity 7: Creating Fields in consumer Objects**

1. Go to the setup page >> click on object manager >> From dropdown click edit for consumer object.
2. Click on fields & relationship >> click on New.
3. Fields - datatype
  - First name - Text
  - Last name - Text
  - Phone number - Phone
  - email - email
  - Rice taken by shops - Number (length=5)
  - Rice type - picklist (1. basmati, 2. normal rice)
  - Mode of payment - Picklist values
    - Credit card
    - Debit card
    - Net banking
    - UPI
    - Cash

## **Activity 8: Creating Cross Object Formula Field in consumer Object**

A cross-object formula field is a formula field that references fields from another object in Salesforce. This type of formula allows users to calculate and display data from multiple objects on a single record.

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

1. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select Data type as “Formula” and click Next.
4. Give Field Label and Field Name as “Amount Paid ” and select formula return type as “Number” and click next.

Step 2. Choose output type

Step 2 of 5

Field Label [ ] Field Name [ ]

Auto add to custom report type  Add this field to existing custom report types that contain this entity [i](#)

**Formula Return Type**

None Selected Select one of the data types below.

Checkbox Calculate a boolean value.  
Example: `[TODAY] > CloseDate`

Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.  
Example: `(Gross Margin = Amount - Cost_c)`

Date Calculate a date, for example, by adding or subtracting days to other dates.  
Example: `[Reminder Date + CloseDate] - 7`

Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.  
Example: `[Amount * 10000] / 24`

Number Calculate a numeric value.  
Example: `[Fahrenheit] = 1.8 * Celsius_c + 32`

Percent Calculate a percent and automatically add the percent sign to the number.  
Example: `[Discount] = (Amount - Discounted_Amount_c) / Amount`

Previous Next Cancel

5. Insert fields formula should be :

`rice_taken_by_shops_c * rice_mill_name_r.rice_price_kg_c`

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

Simple Formula Advanced Formula

Insert Field Insert Operator [▼](#)

**amount paid (Number) =**

```
rice_taken_by_shops_c * rice_mill_name_r.rice_price_kg_c
```

Functions

-- All Function Categories --

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

[Insert Selected Function](#)

[Check Syntax](#) No syntax errors in merge fields or functions. (Compiled size: 67 characters)

1. Creating the Formula field in consumer Object

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

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

7. click "Check Syntax" and Save.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes a cloud icon, a search bar labeled 'Search Setup', and various global buttons. Below the header, the 'Object Manager' section is selected. A breadcrumb trail indicates 'SETUP > OBJECT MANAGER consumer'. On the left, a sidebar lists options like 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', etc. The main content area displays the 'Amount Paid' custom field details. The field is named 'Amount Paid' with API name 'Amount\_Paid\_\_c'. It is defined as a formula type with 2 decimal places. The formula is set to 'Rice\_taken\_by\_shops\_\_c \* rice\_mill\_name\_\_r.rice\_price\_kg\_\_c'. The 'Field Information' section shows the field was created by 'Leela Galla' on 24/09/2024, 11:57 am, and modified by the same user on 24/09/2024, 11:57 am.

## 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 the phone number field in consumer object

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

1. Go to the setup page >>click on object manager >> From dropdown click edit for consumer object.
2. Click on the validation rule >> click New.

SETUP > OBJECT MANAGER  
consumer

**Validation Rules**  
1 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Phonenumberoremailblankrule	Top of Page	please fill in your phone number	✓	Leela Galla, 24/09/2024, 12:00 pm

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

Validation Rule Edit

Rule Name: phonenumberoremailblankrule

Active:

Description: phone number and email should not be blank

Error Condition Formula

Example: Discount\_Percent\_c>0.30 | More Examples...  
Display an error if Discount is more than 30%  
If this formula expression is true, display the text defined in the Error Message area

Insert Field | Insert Operator | OR( ISBLANK( phone\_number\_c ), ISBLANK( email\_c ) )

Functions

- All Function Categories -
- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function  
ABS(number)  
Returns the absolute value of a number, a number without its sign  
Help on this function

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

The screenshot shows the Salesforce Validation Rule Formula Editor. The formula entered is `OR( ISBLANK( phone_number__c ), ISBLANK( email__c ) )`. A context menu is open on the right side of the formula bar, listing various functions: ABS, ADDMONTHS, AND, ASCII, ASIN, Insert Selected Function, ABS(number), and Help on this function. Below the formula bar, there is a "Check Syntax" button. The main area displays an "Error Message" section with an example message "Discount percent cannot exceed 30%" and instructions for defining the error message. It also shows the "Error Location" options: Top of Page (selected) and Field.

9.

10. Save the validation rule.

## Milestone 6 - Page layouts

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

### Activity 1: creating the page layout

To Create a Page layout:

1. Go to Setup >> Click on Object Manager >> Search for the object (consumer) >> From dropdown select the object and click on it.
2. Click on Page layout >> Click on New.

SETUP > OBJECT MANAGER  
**consumer**

Details  
Fields & Relationships  
**Page Layouts**  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types

**Page Layouts**  
1 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
consumer Layout	Leela Galla, 24/09/2024, 10:01 am	Leela Galla, 24/09/2024, 12:16 pm

Quick Find New Page Layout Assignment

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

#### Create New Page Layout

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

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

**Save** **Cancel**

4.

5. Drag and drop the section field to consumer details and create the section.
6. Enter the section name as "Personal details", - click Ok.

Customer name Gas Station name Phone Number

Email First Name

**Section Properties**

Section Name: **personal details**

Display Section Header On:  
 Detail Page  
 Edit Page

Layout:  
 1-Column  2-Column

Tab-key Order:  
 Left-Right  Top-Down

**OK** **Cancel**

7. Now drag the fields to this section that mentioned, they are
  - First name, last name, consumer name, phone number, email, rice mill name.
8. Follow the same process for another two sections as shown above, they are
9. One section is "rice details", drag the fields that are
  - Rice taken by shop, rice type.
10. Another section is "Receipt details", and drag the fields that are
  - Mode of payment, Amount paid.
11. Then, Click save.

12.

The screenshot shows the Salesforce Layout Properties window. At the top, there's a toolbar with Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. On the left, a sidebar titled 'Fields' lists various types like Buttons, Quick Actions, Mobile & Lightning Actions, etc. The main area has a 'Quick Find' bar and a table for mapping fields:

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

Below this, there are three sections:

- product info**: rice type: Sample Text, rice taken by shops: 47.917
- personal details**: first name: Sample Text, last name: Sample Text, customer Name: GEN-2004-001234, phone number: 1-415-555-1212, email: sarah.sample@company.com, rice mill name: Sample Text
- receipt details**: mode of payments: Sample Text, amount paid: 313.59

## Milestone 7 - Profiles

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

Types of profiles in salesforce

### 1. Standard profiles:

By default, salesforce provides below standard profiles.

- Contract Manager
- Read Only

- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

We cannot delete standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

## 2. Custom Profiles:

Custom ones defined by us.

They can be deleted if there are no users assigned with that particular one.

### Activity 1: owner Profile

To create a new profile:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (owner) >> Save.

The screenshot shows the Salesforce Setup interface under the 'Profiles' section. The profile details for 'owner' are displayed, including the name, user license (Salesforce), and creation information (Leela Galla, 24/09/2024, 2:00 pm). The 'Custom Profile' checkbox is checked. Below this, the 'Page Layouts' section shows assignments for various objects like Global, Email Application, Home Page Layout, Account, and Alternative Payment Method. The 'Alternative Payment Method' layout is currently selected.

Profile Detail			
Name	owner	<a href="#">Edit</a>	<a href="#">Clone</a>
User License	Salesforce	Custom Profile <input checked="" type="checkbox"/>	
Description			
Created By	Leela Galla, 24/09/2024, 2:00 pm	Modified By	Leela Galla, 24/09/2024, 2:05 pm

Page Layouts					
Standard Object Layouts		Location Group Assignment		Location Group Assignment Layout	
Global	<a href="#">Global Layout</a> [ View Assignment ]			[ View Assignment ]	
Email Application	Not Assigned [ View Assignment ]	Macro		Macro Layout [ View Assignment ]	
Home Page Layout	<a href="#">DE Default</a> [ View Assignment ]	Object Milestone		Object Milestone Layout [ View Assignment ]	
Account	<a href="#">Account Layout</a> [ View Assignment ]	Operating Hours		Operating Hours Layout [ View Assignment ]	
Alternative Payment Method	Alternative Payment Method Layout	Opportunity		Opportunity Layout	

- 2.
3. Scroll down to Custom Object Permissions and Give access permissions for consumers, rice details, rice mill and suppliers objects as mentioned in the below diagram.

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

- ## 4. Session Settings

## Activity 2: Employer Profile

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

- Moreover, click save.

### Activity 3: Worker Profile

- Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard Platform User) >> enter profile name (worker) >> Save.
- While still on the profile page, then 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.

The screenshot shows the Salesforce 'Profiles' page under the 'SETUP' tab. It displays two tables of permissions for various objects:

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

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

- Moreover, click save.

### Milestone 8 - Role & Role Hierarchy

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

## Activity 1: Creating owner Role

Creating owner Role:

1. Go to quick find>>Search for Roles>>click on set up roles.
2. Go to quick find> Search for Roles>>click on set up roles.

The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. The left sidebar has a search bar ('roles') and a 'Users' section with 'Roles' selected. The main content area is titled 'SETUP Roles'. It contains a 'Understanding Roles' section with a 'Sample Role Hierarchy' diagram. The diagram shows a hierarchy from 'Executive Staff' (CEO, President, CFO, VP, Sales) down to 'Western Sales Director' (CA Sales Rep, OR Sales Rep), 'Eastern Sales Director' (NY Sales Rep, MA Sales Rep), and 'International Sales Rep' (Asia Sales Rep, European Sales Rep). Descriptions for each level are provided. At the bottom right of the main content area is a 'Set Up Roles' button.

3. Click on Expand All and click on add role under whom this role works.

The screenshot shows the 'Your Organization's Role Hierarchy' page. At the top, there is a 'Collapse All' and 'Expand All' button, with 'Expand All' highlighted. Below is a tree view of roles:

- Nick Enterprises**
  - CEO** Edit | Del | Assign
    - Add Role**
  - HR** Edit | Del | Assign
    - Add Role**
  - Manager** Edit | Del | Assign
    - Add Role**
  - On Site Emp** Edit | Del | Assign
    - Add Role**
  - Remote Emp** Edit | Del | Assign
    - Add Role**

4. Give Label as "owner" and Role name gets auto populated. Then click on Save.

Role Edit  
New Role

Help for this Page ?

**Role Edit**

Label: owner

Role Name: Owner

This role reports to: CEO

Role Name as displayed on reports:

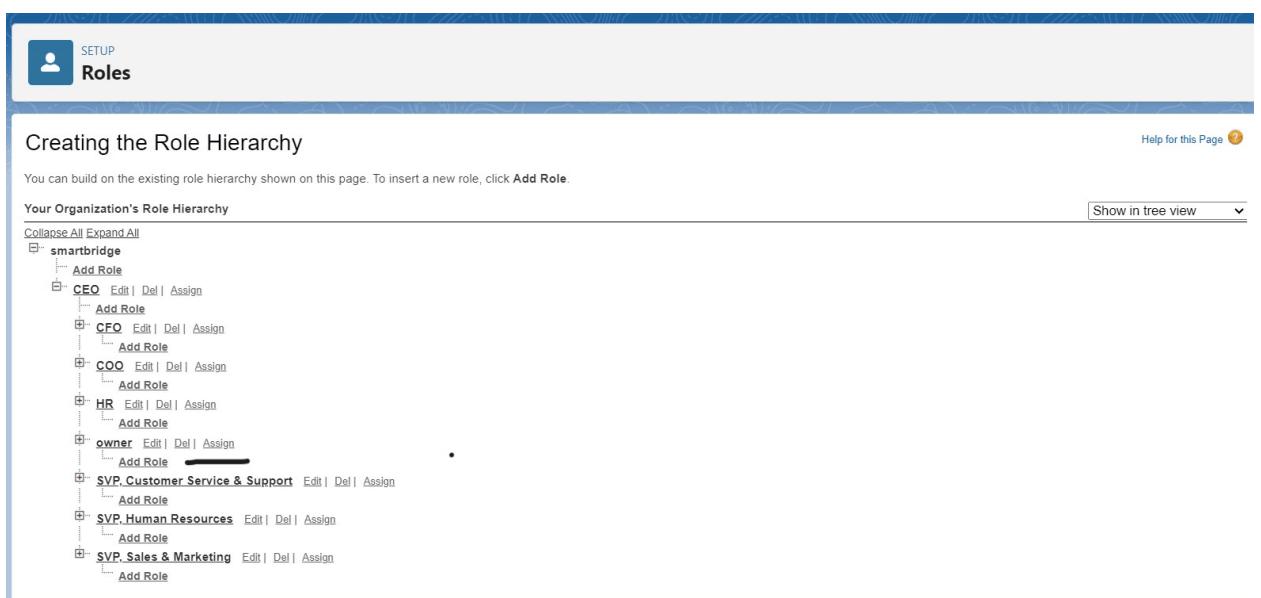
Save Save & New Cancel

5. Click and save it.

## Activity 2: Creating employer roles

Creating another two roles under manager

1. Go to quick find>>Search for Roles >>click on set up roles.
2. Click plus on CEO role, and click add role under owner.



4. Give Label as "employer" and Role name gets auto populated. Then click on Save.
5. Repeat the same steps, for another role.
6. Click plus on CEO role, and click plus on owner, and click add role under employer.

The screenshot shows the Salesforce Setup interface for Roles. The main title is 'SETUP Roles'. Below it is a tree view of roles:

- Manager**: Edit | Del | Assign
  - Add Role
- On Site Employee**: Edit | Del | Assign
  - Add Role
- Remote Employee**: Edit | Del | Assign
  - Add Role
- owner**: Edit | Del | Assign
  - Add Role
- employer**: Edit | Del | Assign
  - Add Role
- SVP, Customer Service & Support**: Edit | Del | Assign
  - Add Role
- Customer Support, International**: Edit | Del | Assign
  - Add Role
- Customer Support, North America**: Edit | Del | Assign
  - Add Role
- Installation & Repair Services**: Edit | Del | Assign
  - Add Role
- SVP, Human Resources**: Edit | Del | Assign
  - Add Role
- SVP, Sales & Marketing**: Edit | Del | Assign
  - Add Role
- VP, International Sales**: Edit | Del | Assign
  - Add Role
- VP, Marketing**: Edit | Del | Assign
  - Add Role

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

## Milestone 9 - Users

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

### Activity 1: Create User

1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
3. First Name: Vicky
4. Last Name: y
5. Alias: Give a Alias Name
6. Email id: Give your Personal Email id

7. Username: Username should be in this form: text@text.text
8. Nick Name: Give a Nickname
9. Role: owner
10. User license: Salesforce
11. Profiles: owner.

User Edit  
vicky y

User Edit      Save      Save & New      Cancel

**General Information**

First Name	vicky	Role	owner
Last Name	y	User License	Salesforce
Alias	vy	Profile	owner
Email	leelagalla23@gmail.com	Active	<input checked="" type="checkbox"/>
Username	leelagalla23@18gmail.com	Marketing User	<input type="checkbox"/>
Nickname	vicky	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>

12. Save it.

## Activity 2: creating another users

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

User Edit

ram ram

User Edit

Save Save & New Cancel

General Information

First Name: ram

Last Name: ram

Alias: rram

Email: leelagalla23@gmail.com

Username: leelagalla23@188gmail.con

Nickname: ramu

Title:

Company:

Role: employer

User License: Salesforce Platform

Profile: Standard Platform User

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

### Activity 3: Create Another User

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

User Edit  
ragu raj

User Edit

General Information

First Name	ragu	Role	worker
Last Name	raj	User License	Salesforce Platform
Alias	rraj	Profile	Standard Platform User
Email	leelagalla23@gmail.com	Active	<input checked="" type="checkbox"/>
Username	leelagalla23@181gmail.con	Marketing User	<input type="checkbox"/>
Nickname	ragu	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>

## Milestone 10 - Permission sets

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

### Activity 1: Creating OWD setting.

1. Go to setup >> type "sharing settings " in quick search >> Click edit.

sharing

SETUP Sharing Settings

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects

Disable External Sharing Model

Default Sharing Settings

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>

2. Scroll down, change the default internal access to " public read-only" for rice mill

and supplier object.

3. Click save.
4. Extra information, By these every profile has their own access, according to their profile.
5. But in our case we created roles and given the roles in such a way that the owner can see employer and worker records, and the employer can see the worker records.

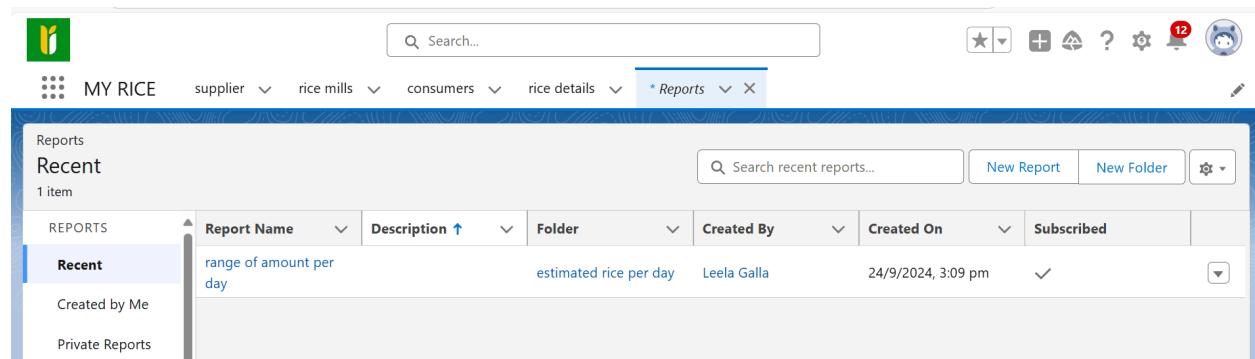
## Milestone 11 - Report

### Activity 1: Create Report

Note : Before creating a report, create the latest “10” records in consumer objects.

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

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



The screenshot shows the 'MY RICE' application interface. At the top, there is a navigation bar with icons for search, favorite, add, settings, and notifications (with 12 notifications). Below the navigation bar, the main header reads 'MY RICE'. To the right of the header are dropdown menus for 'supplier', 'rice mills', 'consumers', 'rice details', and 'Reports'. The 'Reports' menu is currently selected and highlighted in blue. The main content area is titled 'Reports' and 'Recent'. It displays a table with one item: 'range of amount per day' (Report Name), 'estimated rice per day' (Description), 'Leela Galla' (Created By), and '24/9/2024, 3:09 pm' (Created On). The table has columns for 'REPORTS', 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. On the left side of the content area, there is a sidebar with categories: 'RECENT' (selected), 'Created by Me', and 'Private Reports'.

3. select for report type, search for “rice mill with consumers” click on it. And click on start report.

Create Report

1. Their outline pane is opened already, select the fields that are mentioned below in the column section.

- 1.consumer name
- 2.rice type
- 3.rice price/kg
- 4.mode of payments
- 5.amount paid

2. Remove the unnecessary fields.

3. Select the fields that are mentioned below in the GROUP ROWS section.

1. Rice taken by shops

Rice taken by shops	consumer: consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
11 (1)	consumers-008	1.basmati	50	UPI	550.00
<b>Subtotal</b>					550.00
23 (1)	consumers-001	1.basmati	50	Cash	1,150.00
<b>Subtotal</b>					1,150.00
100 (1)	consumers-007	1.basmati	50	Cash	5,000.00
<b>Subtotal</b>					5,000.00
187 (1)	consumers-004	1.basmati	50	Cash	9,350.00
<b>Subtotal</b>					9,350.00
453 (1)	consumers-005	2.normal rice	50	UPI	22,650.00
<b>Subtotal</b>					22,650.00

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

Report: rice mills with consumers  
range of amount per day

Total Records Total rice price/kg Total amount paid  
11 50 9,050.00

	rice taken by shops ↑	consumer: consumer name ↓	rice type ↓	rice price/kg ↓	mode of payments ↓	amount paid ↓
5 (2)	A-0001	basmati	50	Net banking	250.00	
	A-0005	normal rice	50	Cash	250.00	
<b>Subtotal</b>			50		500.00	
6 (2)	A-0002	normal rice	50	Cash	300.00	
	A-0004	basmati	50	Cash	300.00	
<b>Subtotal</b>			50		600.00	
8 (1)	A-0003	normal rice	50	Cash	400.00	
<b>Subtotal</b>			50		400.00	
10 (1)	A-0006	basmati	50	Cash	500.00	
<b>Subtotal</b>			50		500.00	
12 (1)	A-0007	basmati	50	Cash	600.00	
<b>Subtotal</b>			50		600.00	
15 (1)	A-0008	basmati	50	Cash	750.00	
<b>Total (11)</b>			50		9,050.00	

Row Counts  Detail Rows  Subtotals  Grand Total

## Activity 2: Sharing report to owner

1. Click edit dropdown and select subscribe option

My Rice suppliers ↓ rice mills ↓ rice details ↓ consumers ↓ \* range of amount per day ×

Report: rice mills with consumers  
range of amount per day

Save As  
Save  
Subscribe   
Export  
Delete  
Add to Dashboard

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

2. Follow as per below image.

Edit Subscription

Settings

Frequency

Daily   Weekly   Monthly

Time

8:00 am ▾

Attachment

Attach File

Recipients

Send email to

Me

Edit Recipients

Run Report As

Me  
 Another Person

Cancel   Save

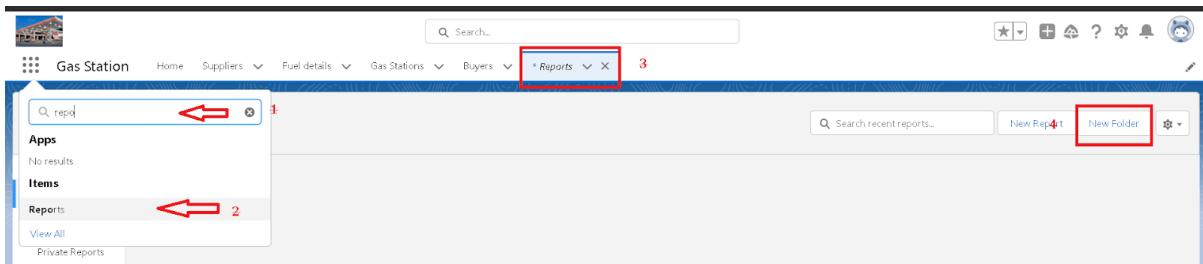
3.

4. After selecting the run report as a “another person” select your personal account or whom you want to send that mail to.
5. Click save.

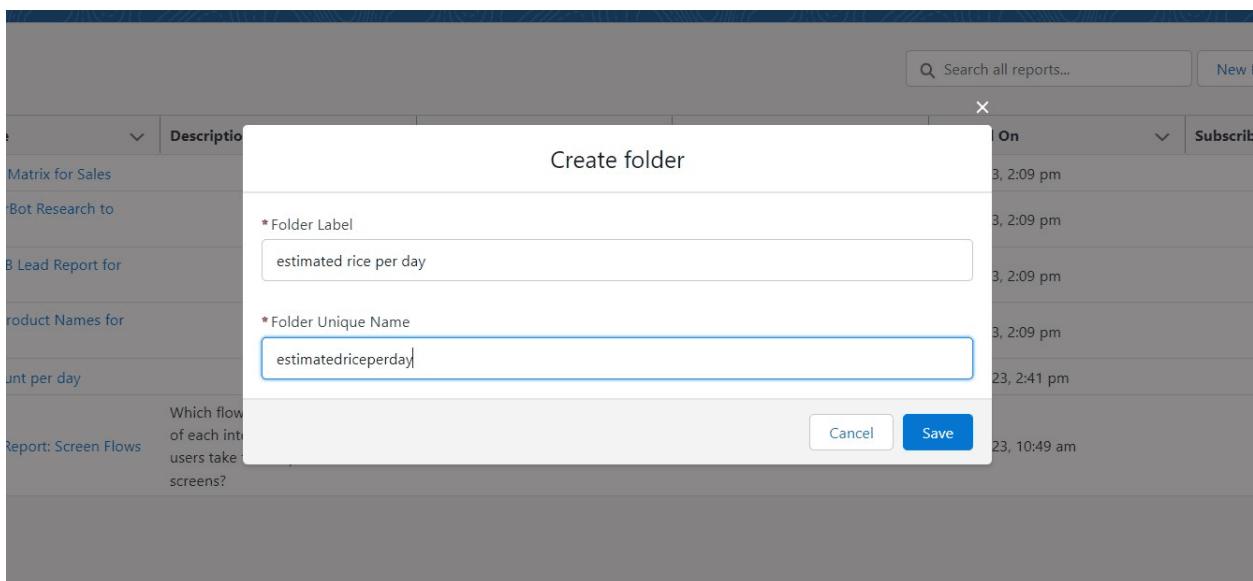
NOTE: The owner gets daily email notification of that rice mill report.so that he can see all data remotely.

### Activity 3: create a report folder

1. Click on the app launcher and search for reports.
2. Double click on the report, “ reports tab” will be auto populated in the navigation bar.
3. Click on the report tab, click on the new folder.



4. Give the Folder label as "estimated rice per day ", Folder unique name will be auto populated.
5. Click save.



- 1.navigate to app launcher and click reports on that.
- 2.click all reports.
3. Select the range of amount per day dropdown in that click move.

REPORTS

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

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

Run

Edit

Subscribe

Export

Delete

Add to Dashboard

Favorite

Move

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

Move range of amount per day

All Folders

- All Folders
- Created by Me
- Shared with Me
- Private Reports
- Public Reports
- estimated rice per day**
- Report Recycle Bin

New Folder Cancel Select

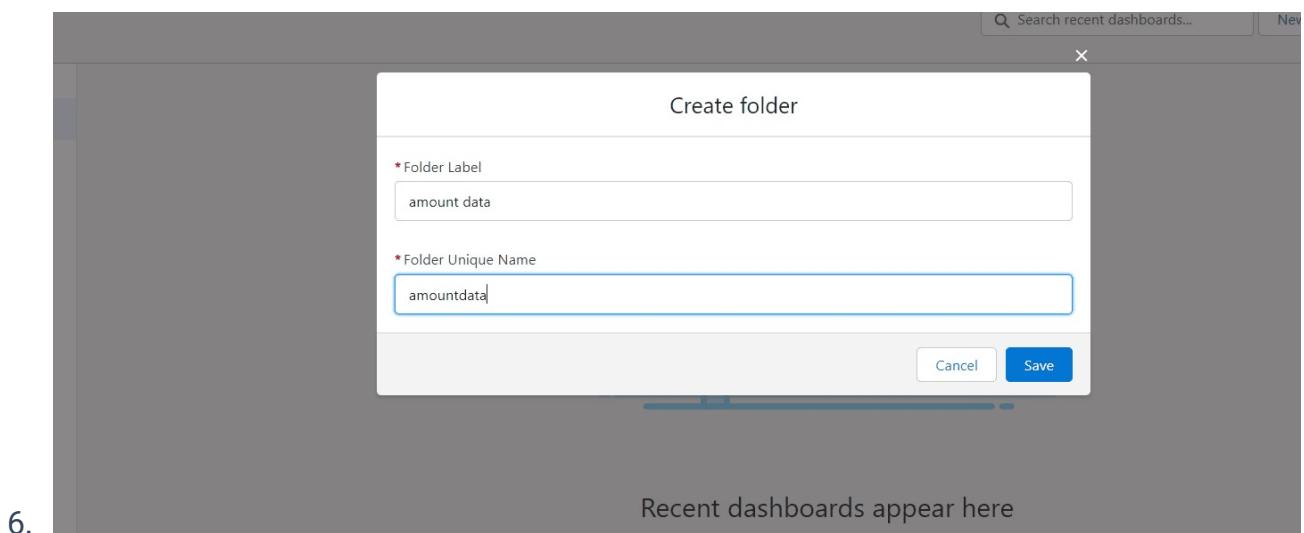
Note: if you want to see the report which you have created then go to reports - all folders - estimated rice per day - your report will appear in this way.

## Milestone 12 - Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

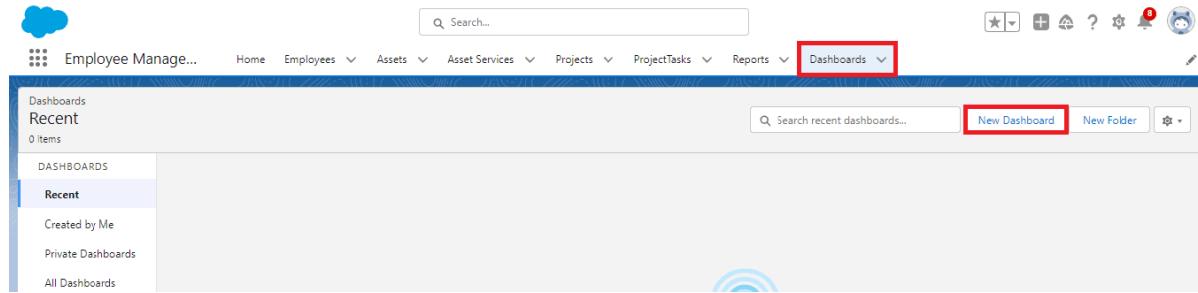
### Activity 1: Create Dashboard Folder

1. Click on the app launcher and search for the dashboard.
2. Click on the dashboard tab.
3. Click the new folder, give the folder label as " amount data dashboard".
4. Folder unique names will be auto populated.
5. Click save.

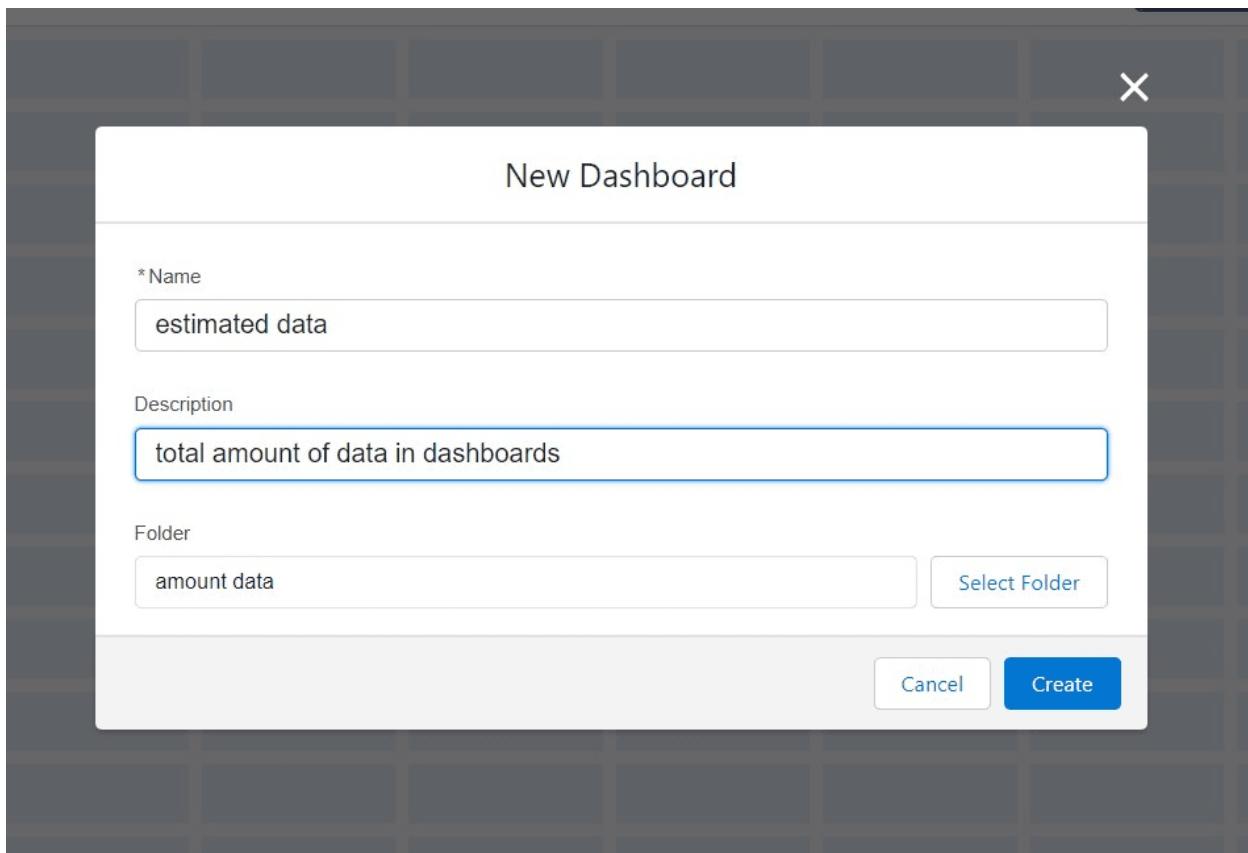


### Activity 2: Create Dashboard

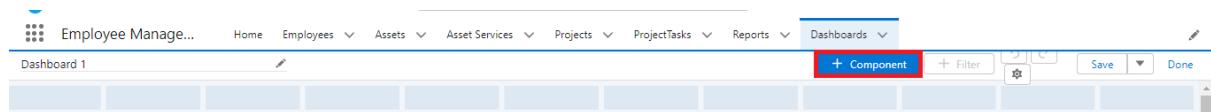
1. Go to the app >> click on the Dashboards tabs.



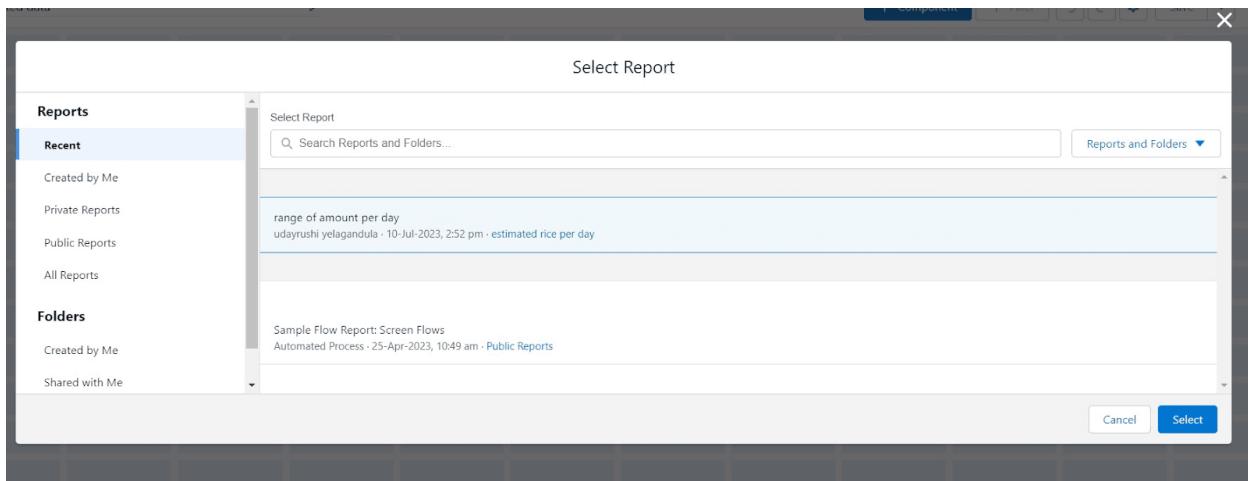
2. Give a Name and select the folder that was created, and click on create.



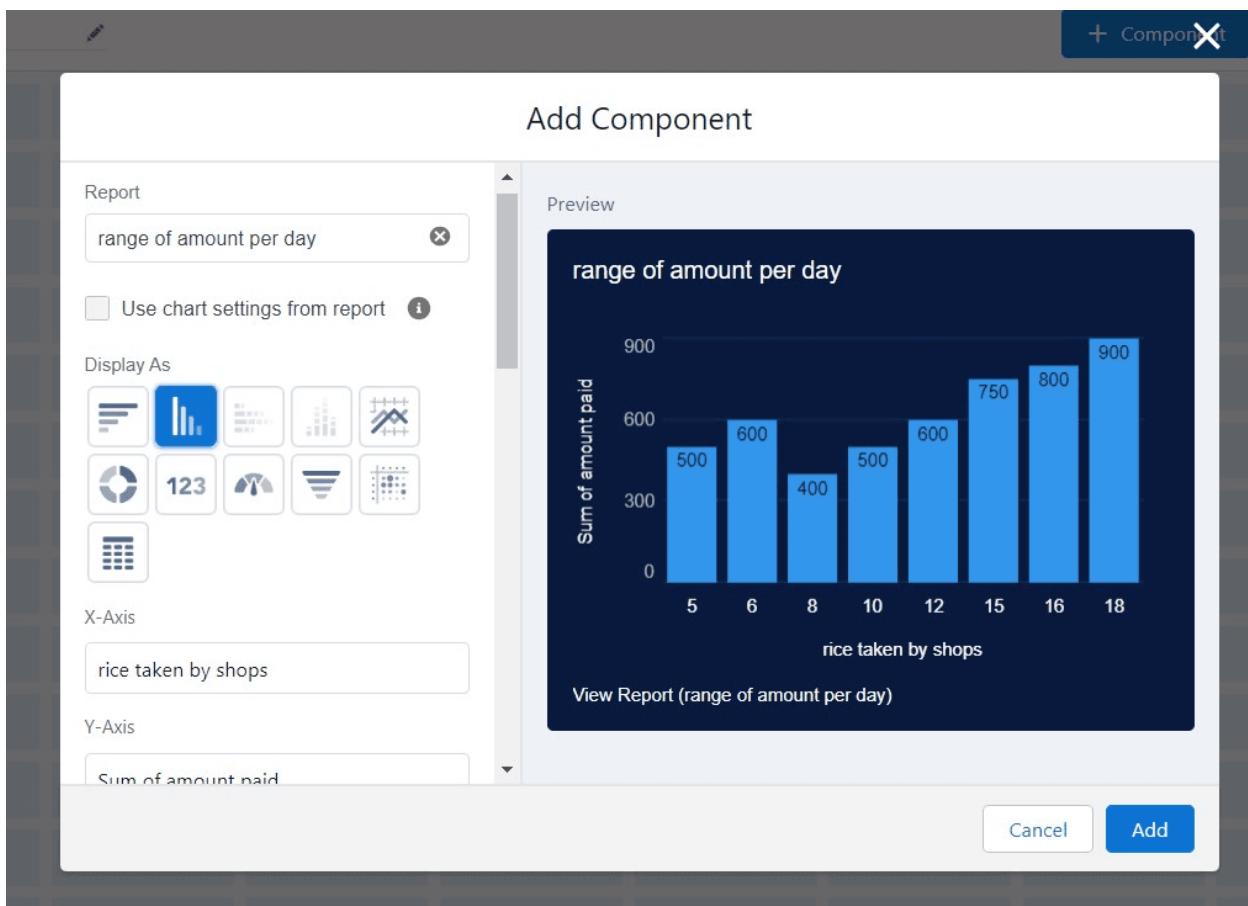
1. Select add component.



1. Select a Report and click on select.



1. Preview is shown below.



Display as>> vertical bar chart

X-axis >> rice taken by shops

Y-axis >> sum of amount

Y-axis range >> automatic

Sort by >> rice taken by shops

Component theme >> dark.

Add the component

Again select add component with above same steps

1.display as donut chart

2.sort by >> sum of amount

3.title>>range of amount per day

4.component theme dark

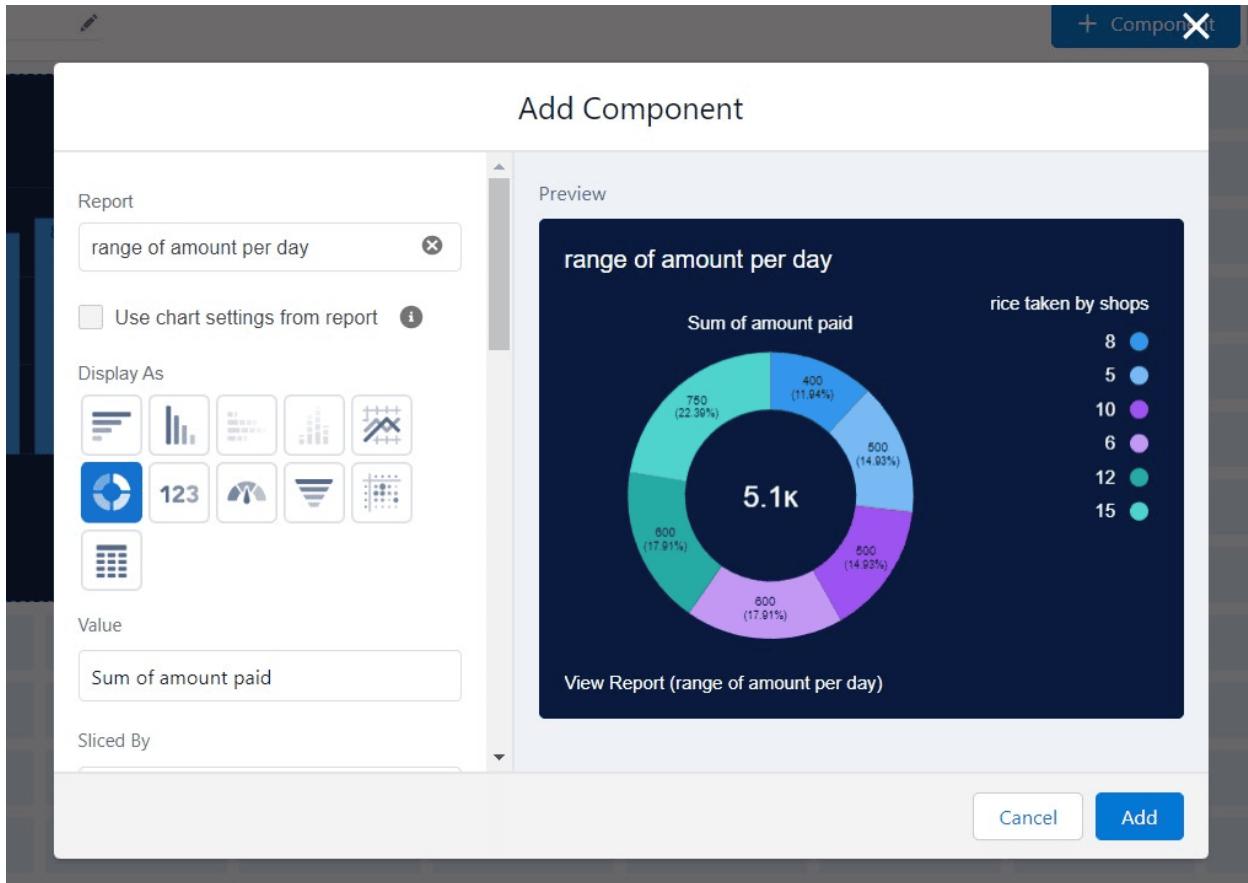
The screenshot shows a configuration dialog for a chart component. The interface is organized into several sections:

- Value:** A dropdown menu containing the option "Sum of amount paid".
- Sliced By:** A dropdown menu containing the option "rice taken by shops".
- Display Units:** A dropdown menu containing the option "Shortened Number".
- Show Options:** A group of four checkboxes:
  - Show Values
  - Show Percentages
  - Combine Small Groups into "Others"
  - Show Total
- Decimal Places:** A dropdown menu containing the option "Automatic".

At the bottom left of the dialog, there is a small button labeled "Cancel".

Click add.

Click save and done.



## 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 Visual force 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:

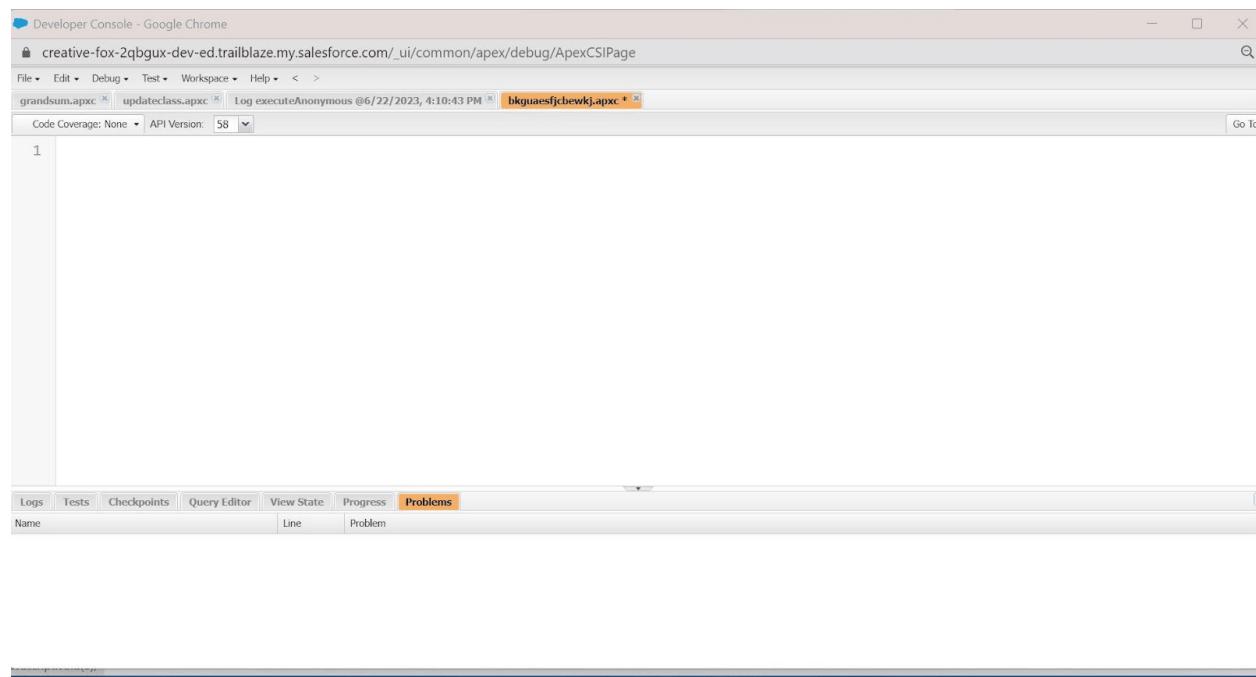
As in Java, you can create classes in Apex. A class is a template or blueprint from which objects are created. An object is an instance of a class.

- 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.



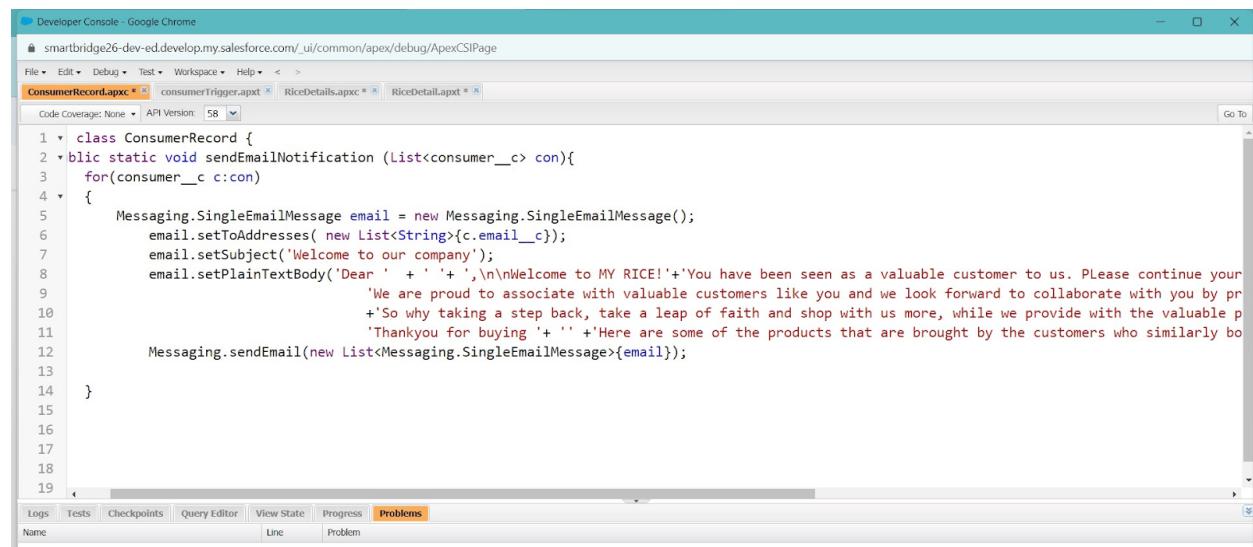
3. Then you can see many tools in the Toolbar of the new console window. Click on

File, New and Apex Class.

- 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});  
  
        }  
    }  
}
```



## Activity 2: Creating an Apex Trigger

How to create a new trigger :

While still in the trail head 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.

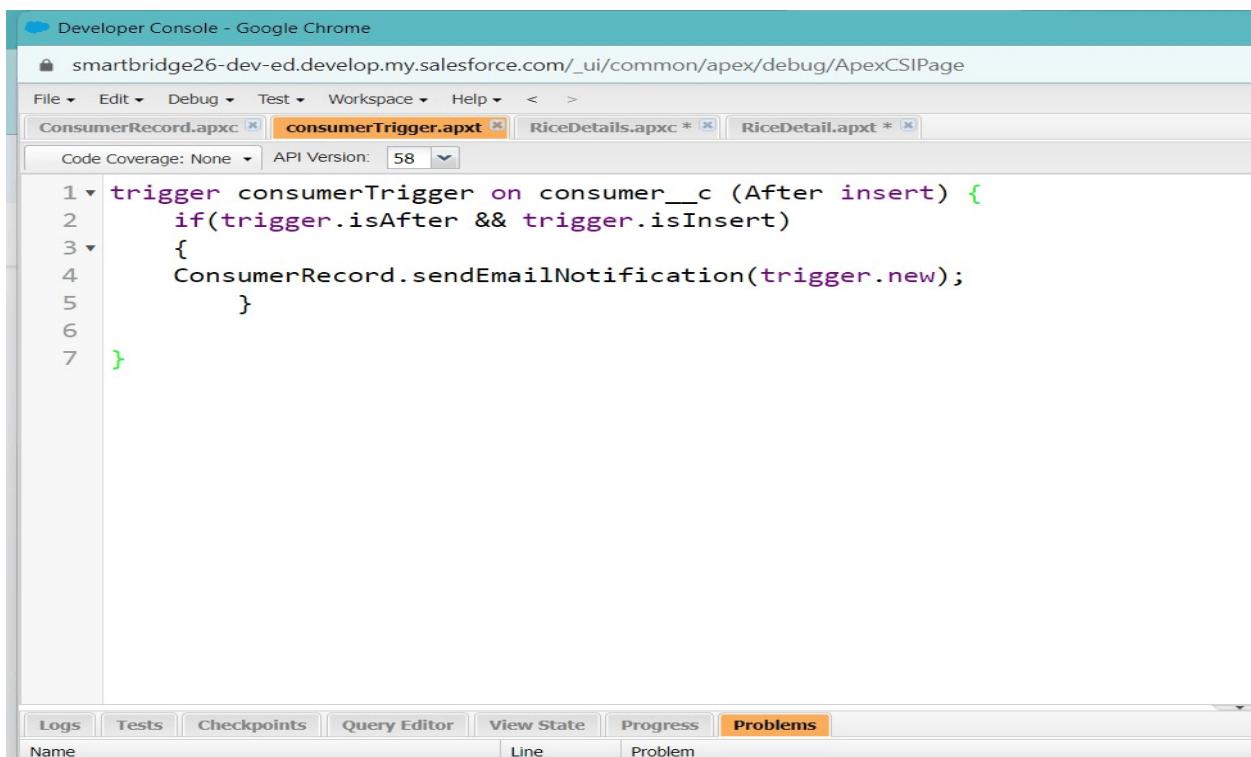
Syntax For creating trigger :

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 Developer Console interface in Google Chrome. The title bar says "Developer Console - Google Chrome". The address bar shows the URL "smartbridge26-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage". The top navigation bar includes "File", "Edit", "Debug", "Test", "Workspace", "Help", and "Code Coverage: None". The API Version is set to 58. Below the navigation is a tab bar with "ConsumerRecord.apxc", "consumerTrigger.apxt" (which is currently selected), "RiceDetails.apxc", and "RiceDetail.apxt". The main editor area contains the Apex trigger code:

```
1 trigger consumerTrigger on consumer_c (After insert) {  
2     if(trigger.isAfter && trigger.isInsert)  
3     {  
4         ConsumerRecord.sendEmailNotification(trigger.new);  
5     }  
6 }  
7 }
```

At the bottom of the screen, there are tabs for "Logs", "Tests", "Checkpoints", "Query Editor", "View State", "Progress", and "Problems". The "Problems" tab is highlighted. A table below the tabs shows columns for "Name", "Line", and "Problem".

## **Conclusion:**

Implementing a CRM application for a wholesale rice mill on Salesforce offers transformative advantages, enhancing both operational efficiency and customer relationship management. By leveraging Salesforce's robust cloud infrastructure, the CRM solution centralizes critical business functions such as lead and opportunity management, order processing, inventory tracking, and customer support. This integration allows the rice mill to optimize sales workflows, streamline inventory management, and deliver personalized service, ensuring better customer satisfaction and loyalty.

Moreover, with Salesforce's automation features, the rice mill can reduce manual tasks, increase productivity, and improve decision-making through real-time analytics and reporting. The scalability and customization capabilities of Salesforce also make it possible for the business to adapt and expand as needed, staying competitive in an evolving marketplace.