

Salesforce AI Developer Virtual Internship

Submitted In accordance with the requirement for the degree of

BACHELOR OF TECHNOLOGY

INFORMATION TECHNOLOGY

Submitted by

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**DEPARTMENT OF INFORMATION TECHNOLOGY
KALLAM HARANADHAREDDY INSTITUTE OF TECHNOLOGY
(AUTONOMOUS)**

Approved by (AICTE, New Delhi; Permanently Affiliated to JNTU KAKINADA)

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NH – 16, Chowdavaram, Guntur – 522019 (A.P)

ACADEMIC YEAR: 2024-2025

PROJECT TITLE :

A CRM APPLICATION FOR WHOLESALE RICEMILL

Overview

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

Key Features and Functionality

Reporting and Dashboards:

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

Rollup Summary Field:

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

Cross-Object Formula Field:

Purpose: References fields from another object in Salesforce.

- Function: Calculates the total amount payable by multiplying the number of rice units taken by the price per kg.

Validation Rules:

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

Permission Sets:

- Organization Wide Defaults (OWD): Defines the baseline level of access for the most restricted user.
- Roles and Access:
 - Owner: Can view records of employers and workers.
 - Employer: Can view records of workers.

Milestone 1 - Salesforce

Introduction

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

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



Activity 1: Creating a Developer Account

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

Go to the Signup Page

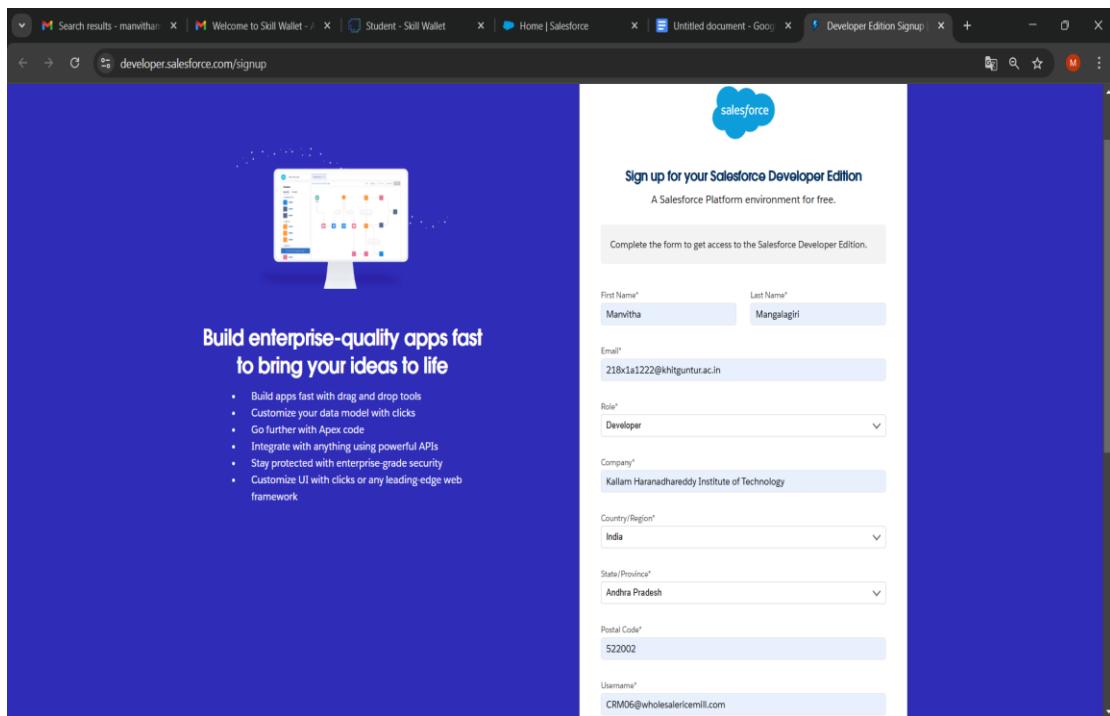
- Navigate to the Salesforce Developer Signup page:

<https://developer.salesforce.com/signup>

Fill Out the Signup Form

- **First Name :** Manvitha
 - **Last Name :** Salesforce-06
 - **Email :** 218x1a1222@khitguntur.ac.in
 - **Role :** Developer
 - **Company :** Kallam Haranadhareddy of Institute of Technology
 - **Country :** India
 - **Postal Code :** 522002
-
- **Username :** CRM06@wholesalericemill.com
- **Submit the Form**
-
- After filling in the details, click on the "Sign me up" button.

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



Activity 2: Account Activation

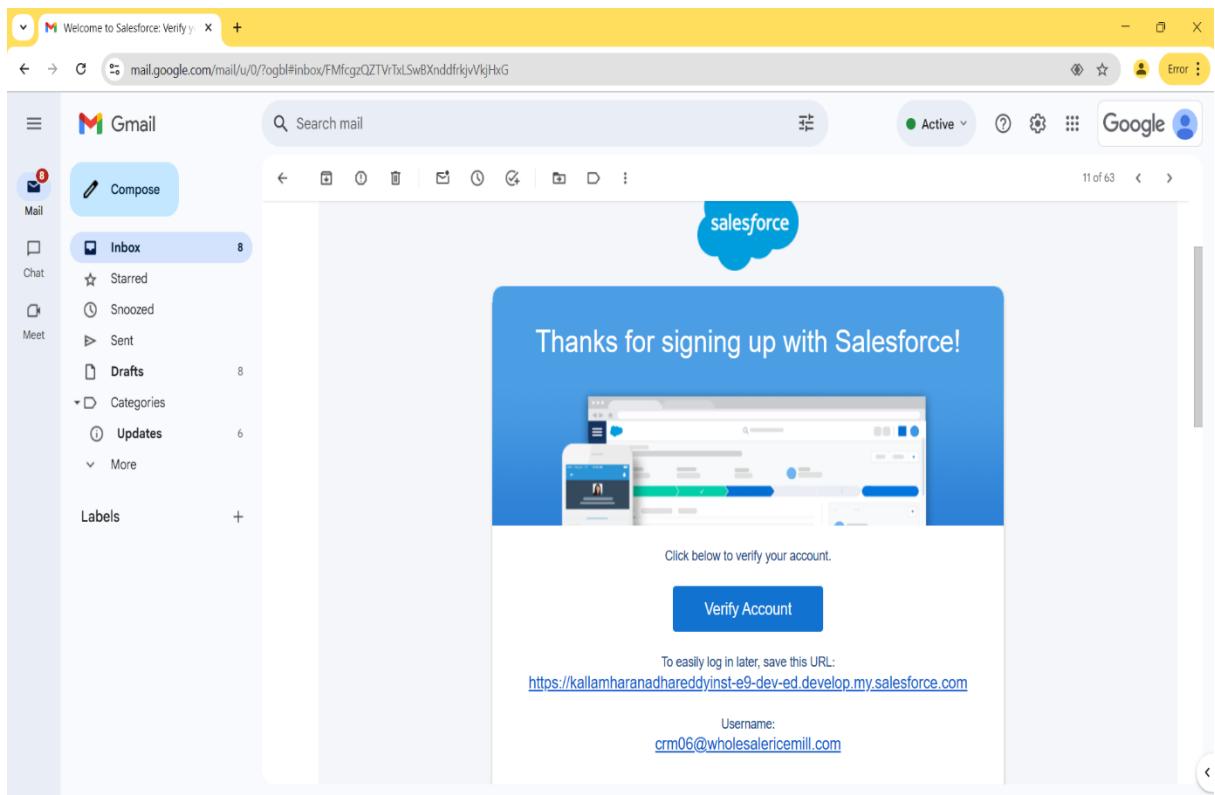
After creating your Salesforce Developer Account, you need to activate it. Follow these steps to activate your account:

Check Your Email

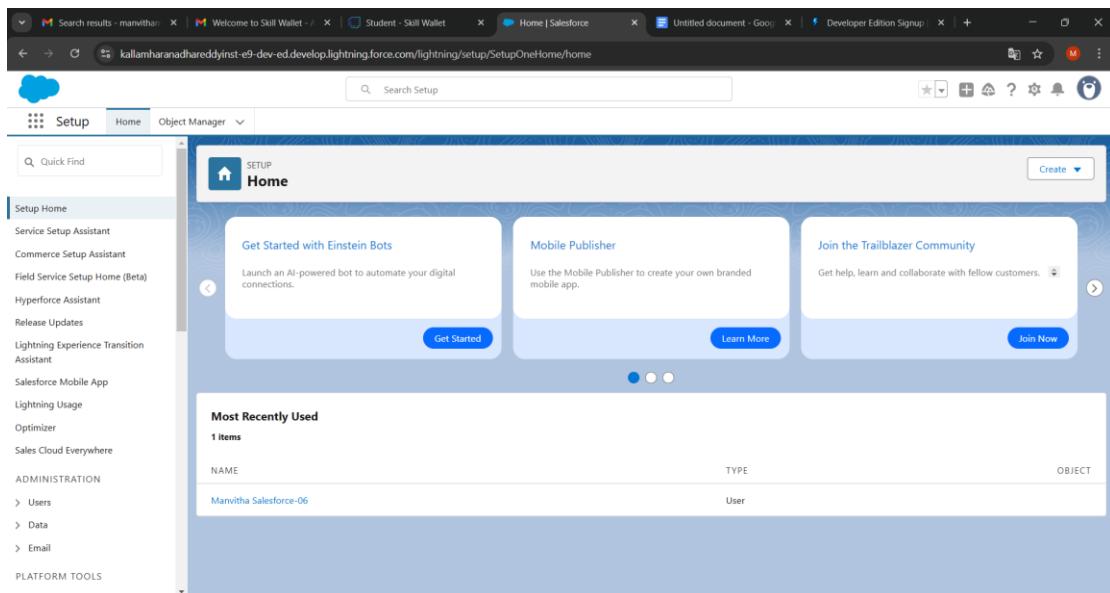
- Go to the inbox of the email address you used while signing up. The verification email may take 5-10 minutes to arrive.

Verify Your Account

- Open the email from Salesforce and click on the "Verify Account" link.
- On the verification page, create a password for your account.
- Answer a security question for account recovery.
- Click on "Change Password".



Check your Verify Account and click reset password



Milestone 2 - Object

What Is an Object?

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

Types of Salesforce Objects

Salesforce objects are of two types:

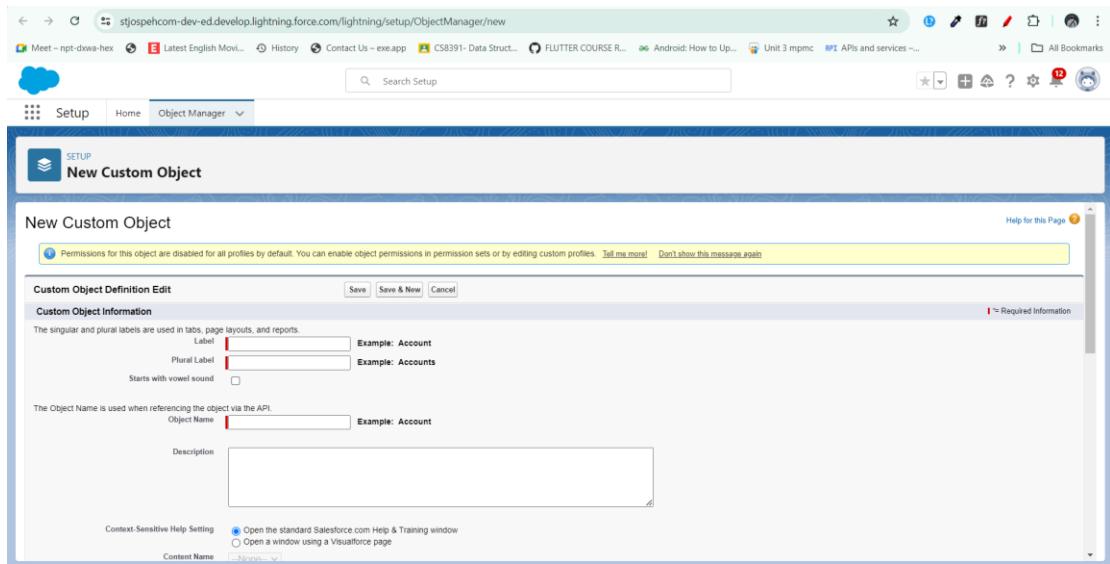
- **Standard Objects:** Standard objects are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- **Custom Objects:** Custom objects are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and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

To Navigate to Setup Page:

- Click on the gear icon
- Click on Setup

To Create an Object:

- From the setup page, click on **Object Manager**
- Click on **Create**
- Click on **Custom Object**
- On the Custom Object defining page:
- Enter the **Label Name** and **Plural Label Name**
- Click on **Allow Reports**
- Click on **Allow Search**
- Click on **Save**



Activity 1: Create Supplier Object

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

Navigate to Setup Page:

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

Create a Custom Object:

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

Define the Custom Object:

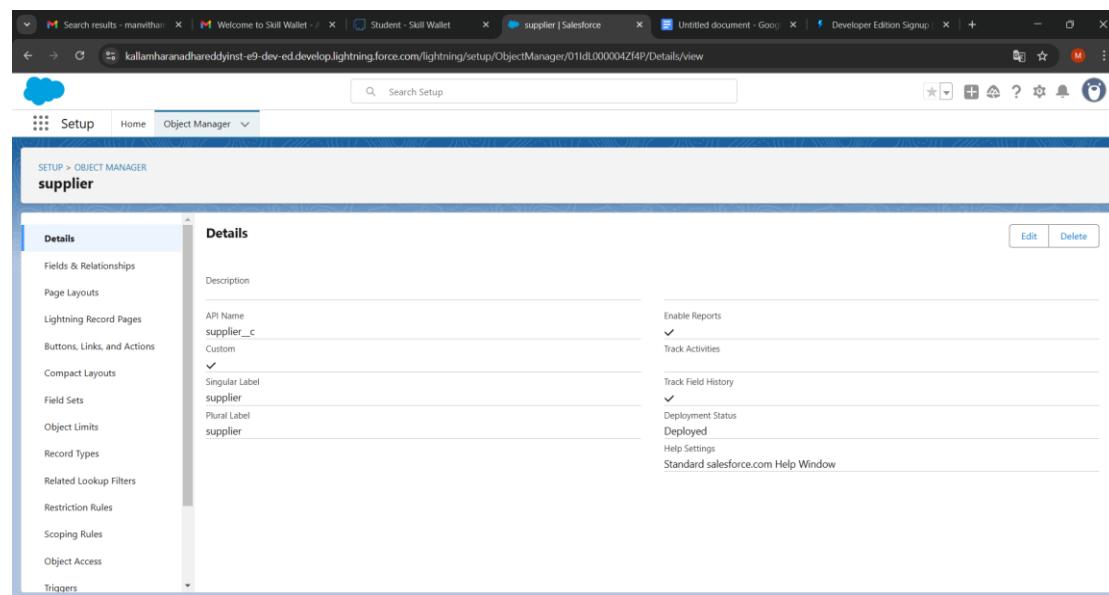
- Enter the **Label Name** : Supplier.
- Enter the **Plural Label Name** : Suppliers.
- Enter the **Record Name Label and Format**:
- **Record Name**: Supplier Name
- **Data Type**: Text

Set Additional Options:

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

Save the Custom Object:

- Click on **Save**.



Activity 2: Create Rice Mill Object

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

Navigate to Setup Page:

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

Create a Custom Object:

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

Define the Custom Object:

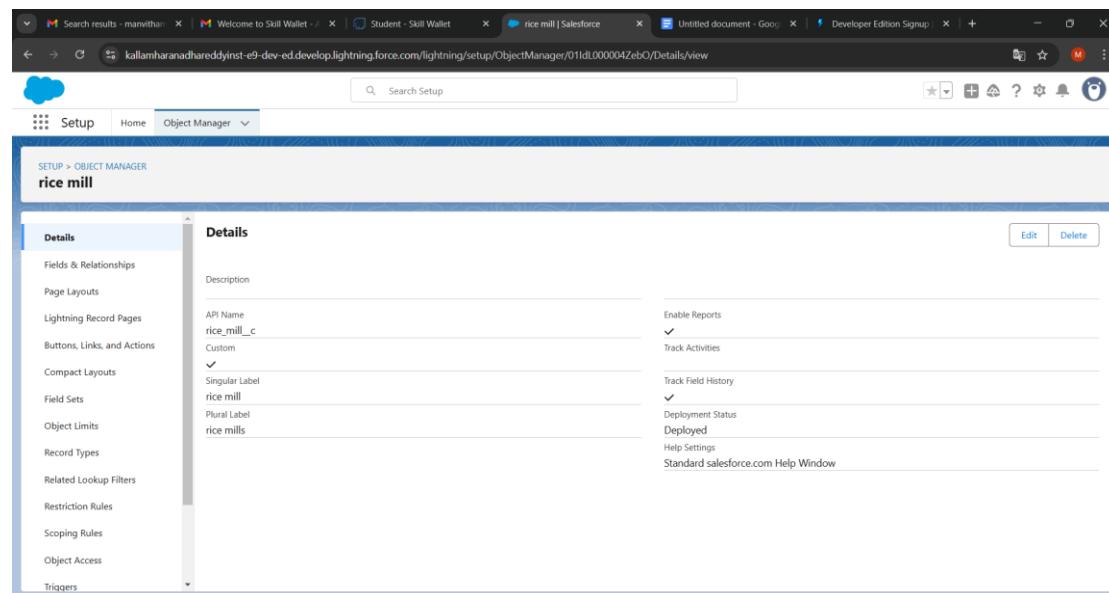
- Enter the **Label Name**: Rice Mill.
- Enter the **Plural Label Name**: Rice Mills.
- Enter the **Record Name Label and Format**:
- **Record Name**: Leave it blank.
- **Data Type**: Auto Number
- **Display Format**: rice-{000}
- **Starting Number**: 1

Set Additional Options:

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

Save the Custom Object:

- Click on **Save**.



Activity 3: Create Consumer Object

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

Navigate to Setup Page:

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

Create a Custom Object:

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

Define the Custom Object:

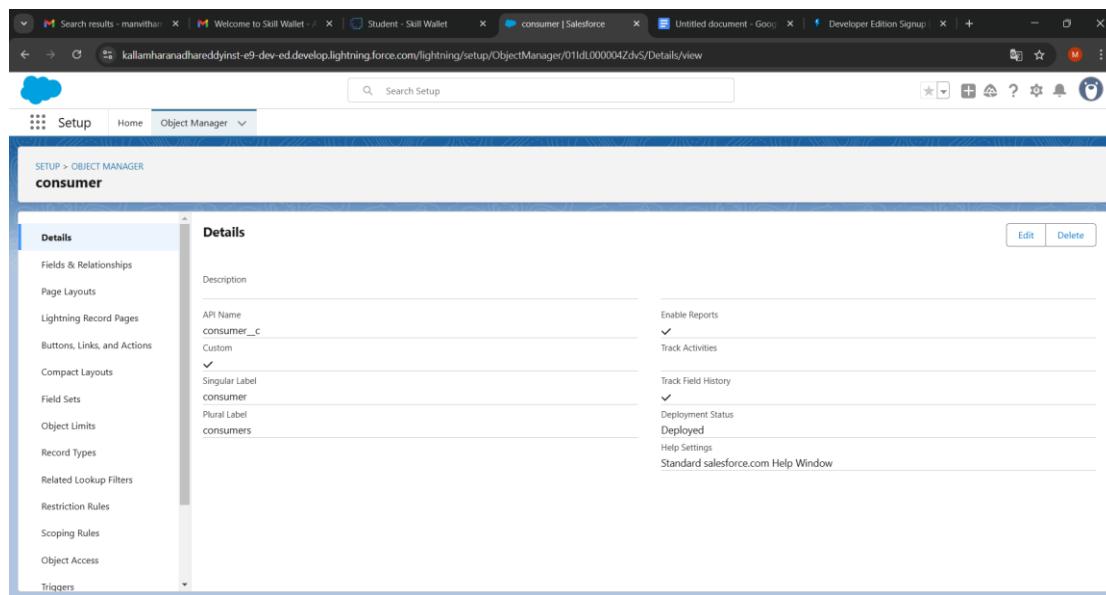
- Enter the **Label Name**: Consumer.
- Enter the **Plural Label Name**: Consumers.
- Enter the **Record Name Label and Format**:
- **Record Name**: Leave it blank.
- **Data Type**: Auto Number
- **Display Format**: consumers-{000}
- **Starting Number**: 1

Set Additional Options:

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

Save the Custom Object:

- Click on **Save**.



Activity 4: Create Rice Details Object

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

Navigate to Setup Page:

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

Create a Custom Object:

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

Define the Custom Object:

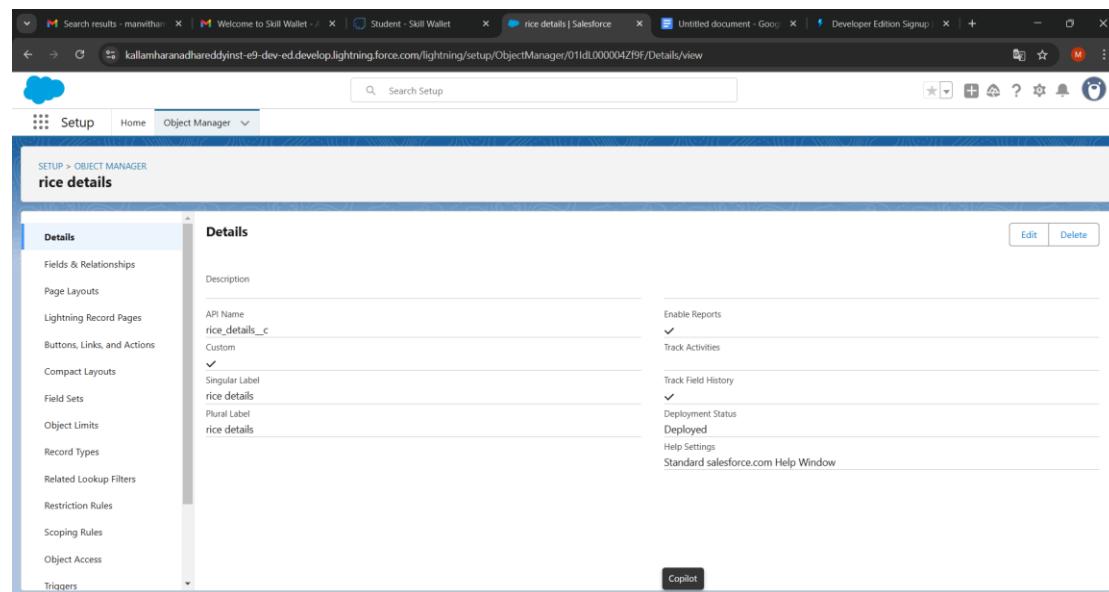
- Enter the **Label Name**: Rice Details.
- Enter the **Plural Label Name**: Rice Details.
- Enter the **Record Name Label and Format**:
- **Record Name**: Leave it blank.
- **Data Type**: Auto Number
- **Display Format**: rice-{000}
- **Starting Number**: 1

Set Additional Options:

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

Save the Custom Object:

- Click on **Save**.

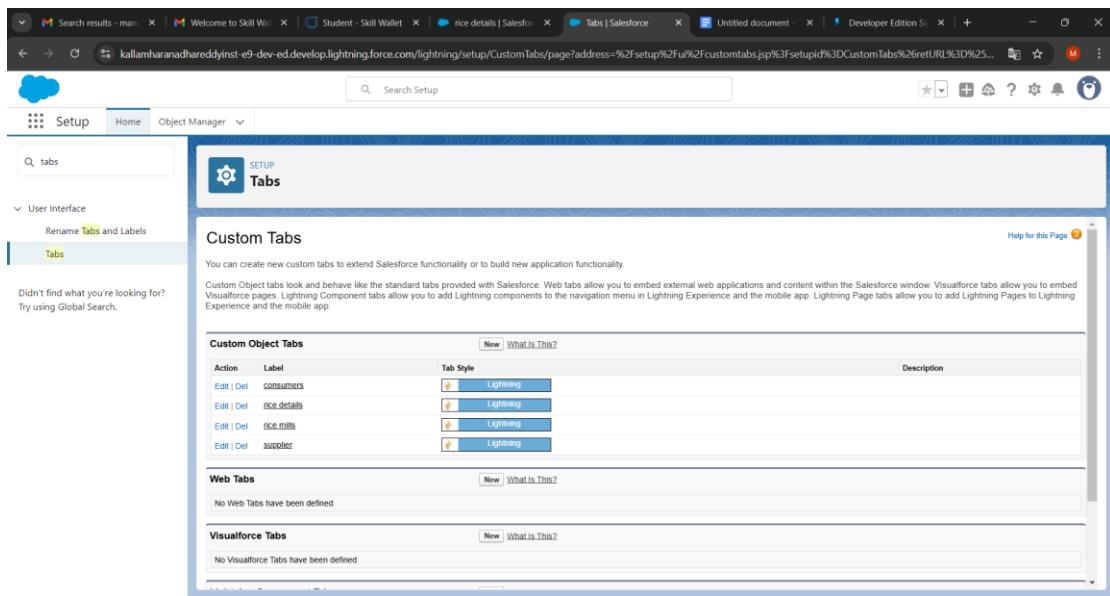


Milestone 3 - Tabs

What is a Tab?

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

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



Activity 1: Creating a Custom Tab (Supplier)

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

Navigate to Setup Page:

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

Create a New Custom Object Tab:

- Click on **New** under the Custom Object Tabs section.

Select Object and Tab Style:

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

Add to Profiles Page:

- Keep it as default.
- Click on **Next**.

Add to Custom App:

- Uncheck the **Include Tab** checkbox.

Append Tab to Users' Existing Personal Customizations:

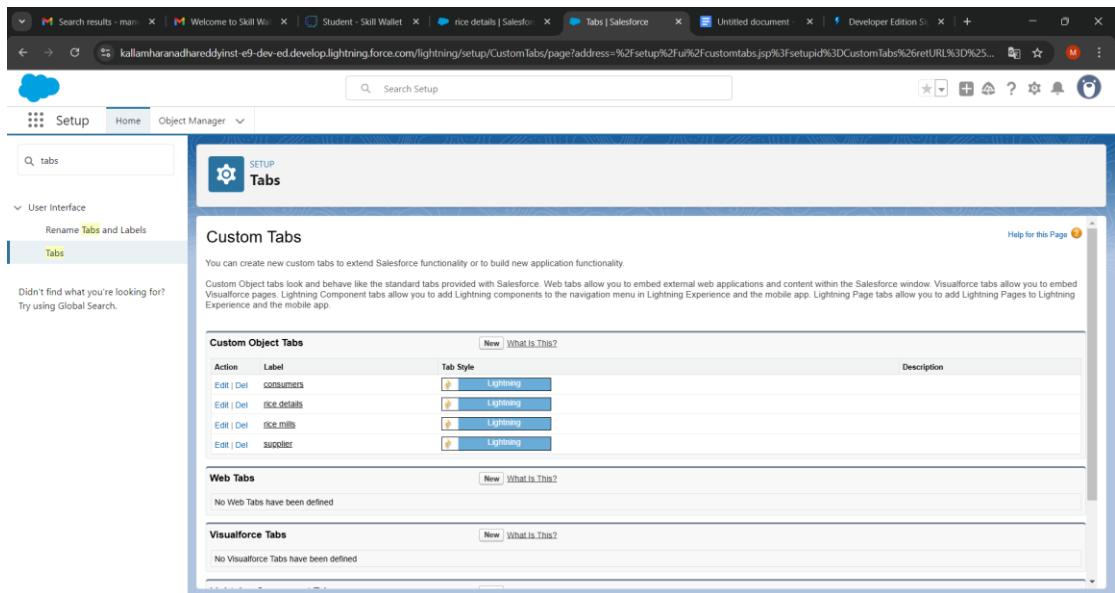
- Ensure that the **Append tab to users' existing personal customizations** option is checked.

Save the Custom Tab:

- Click on **Save**.

Activity 2: Creating Remaining Tabs

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



Milestone 4 - The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your organization can work more efficiently by easily switching between apps.

Activity 1: Create a Lightning App

To create a Lightning app page, follow these steps:

Navigate to App Manager:

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

Fill in App Details:

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

App Options Page:

- Keep the settings as default.
- Click **Next**.

Utility Items Page:

- Keep the settings as default.
- Click **Next**.

Upload a Photo:

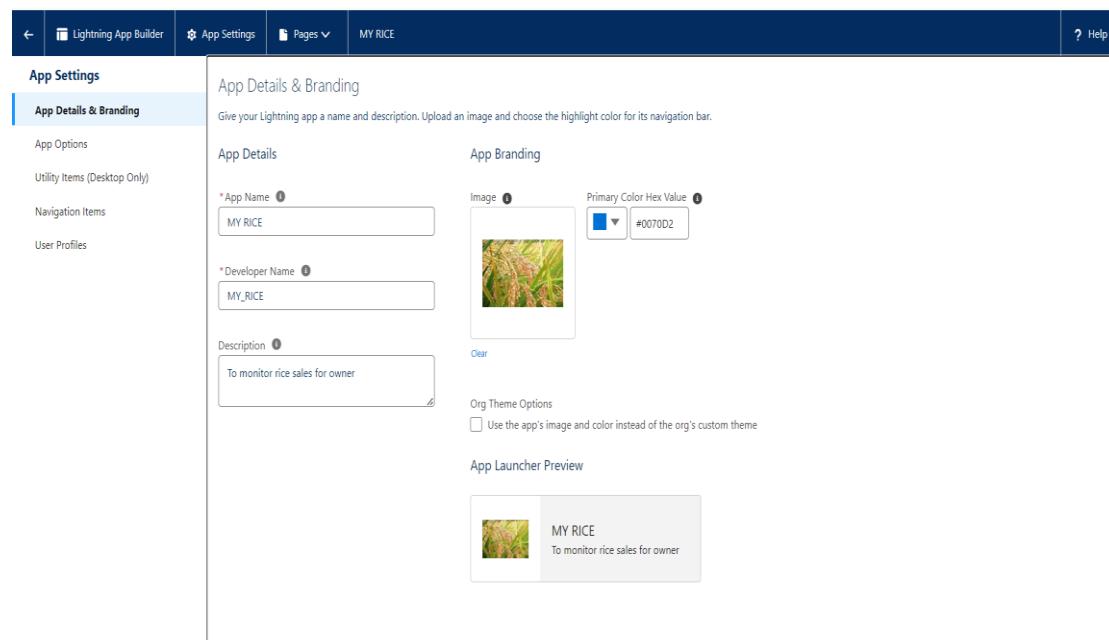
- Upload a photo that is related to your app.

Add Navigation Items:

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

Add User Profiles:

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



Lightning App Builder App Settings MY RICE ? Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

javascript:void(0);

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Type to filter list... Create ▾

- Accounts
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions

Selected Items

- rice mills
- rice details
- supplier
- consumers
- Reports
- Dashboards

▲ ▾

Lightning App Builder App Settings Pages MY RICE ? Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

javascript:void(0);

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Type to filter list...

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website
- Authenticated Website
- B2B Reordering Portal Buyer Profile
- Contract Manager
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile
- Customer Community Login User

Selected Profiles

- System Administrator

Setup Home Object Manager

Lightning Experience App Manager

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visible...
All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	24/06/2024, 11:29 am	Classic	✓
Analytics Studio	Insights	App Launcher tabs	24/06/2024, 11:29 am	Classic	✓
App Launcher	Applauncher	Discover and manage business solutions designed for your industry.	24/06/2024, 11:29 am	Lightning	✓
Bolt Solutions	LightningBolt	Salesforce CRM Community	24/06/2024, 11:29 am	Classic	✓
Community	Community	Salesforce CRM Content	24/06/2024, 11:29 am	Lightning	✓
Content	Content	Use Data Manager to view limits, monitor usage, and manage recipes.	24/06/2024, 11:29 am	Classic	✓
Data Manager	DataManager	Manage content and media for all of your sites.	24/06/2024, 11:29 am	Lightning	✓
Digital Experiences	SalesforceCMS	View Adoption and Usage Metrics for Lightning Experience	24/06/2024, 11:29 am	Lightning	✓
Lightning Usage App	LightningInstrumentation	Track sales and marketing efforts with CRM objects.	24/06/2024, 11:29 am	Classic	✓
Marketing CRM Classic	Marketing	To monitor rice sales for owner	24/06/2024, 12:46 pm	Lightning	✓
MY RICE	MY_RICE	The fundamental Lightning Platform	24/06/2024, 11:29 am	Classic	✓
Platform	Platform	Create and manage queues for your business.	24/06/2024, 11:29 am	Lightning	✓
Queue Management	QueueManagement				

Search results · main · Welcome to Skill Wallet · Student - Skill Wallet · rice details | Salesforce · Recently Viewed | rice · Untitled document · Developer Edition S · +

rice mills · rice details · consumers · supplier

Recently Viewed

0 items • Updated a few seconds ago

rice mill Name
You haven't viewed any rice mills recently. Try switching list views.

Milestone 5: Fields

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

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields

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

- **Created By**
- **Owner**
- **Last Modified**
- **Field Made During Object Creation**

Custom Fields

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to their requirements. Each organization or company can use them if necessary. It means you do not always need to include them in the records, unlike Standard Fields. Hence, the final decision depends on the user, who can add or remove Custom Fields as needed.

Activity 1: Creating the Number Field in Rice Details Object

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

Navigate to Object Manager:

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

Edit the Rice Details Object:

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

Create a New Field:

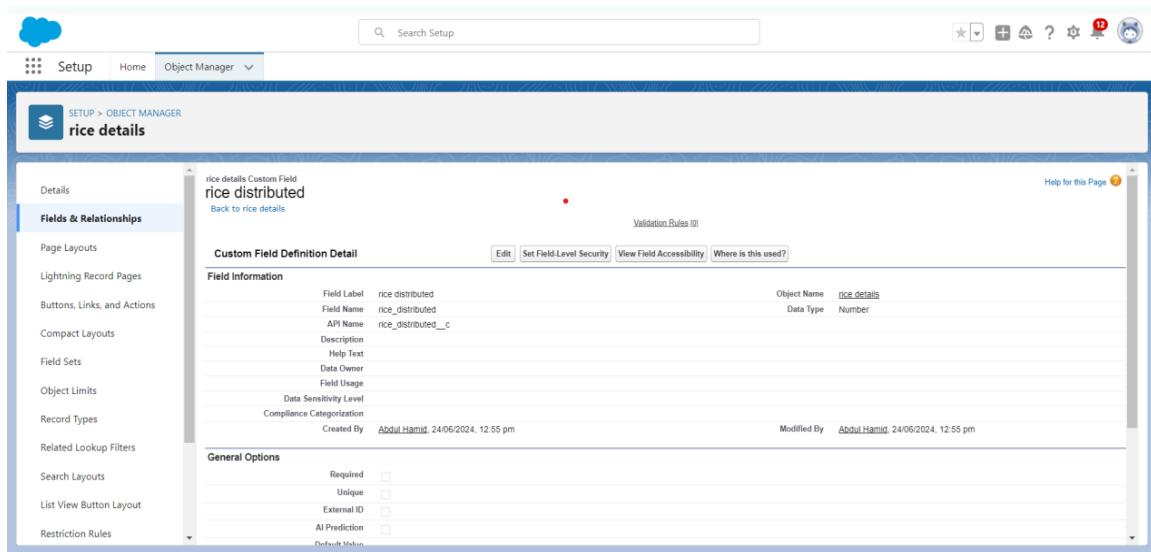
- Click on **Fields & Relationships**.
- Click on **New**.

Select Data Type:

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

Define Field Properties:

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



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.

Navigate to Object Manager:

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

Create a New Field:

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

Select Data Type:

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

Relate to Supplier Object:

- Select the related object **Supplier**.
- Click **Next**.

Define Field Properties:

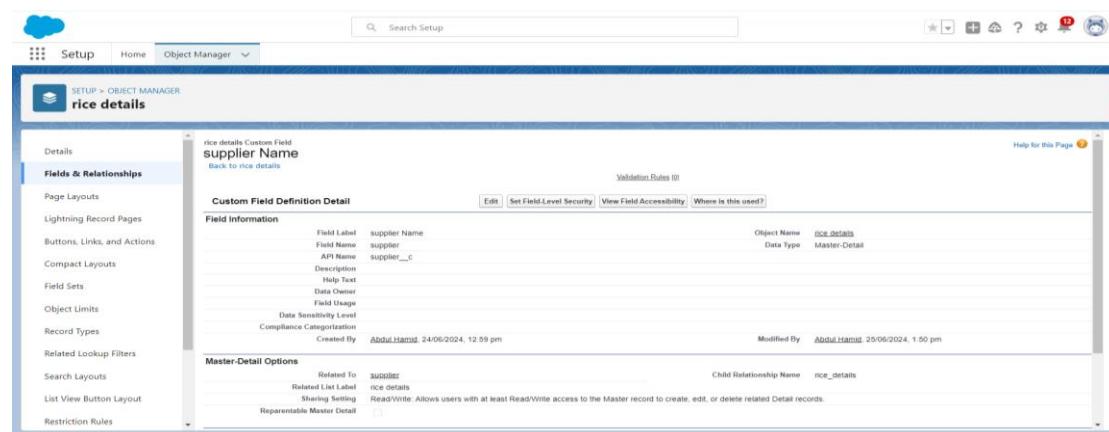
- Give the Field Label as **Supplier Name**.
- Click **Next**.
- Click **Next** again.
- Click **Save & New**.

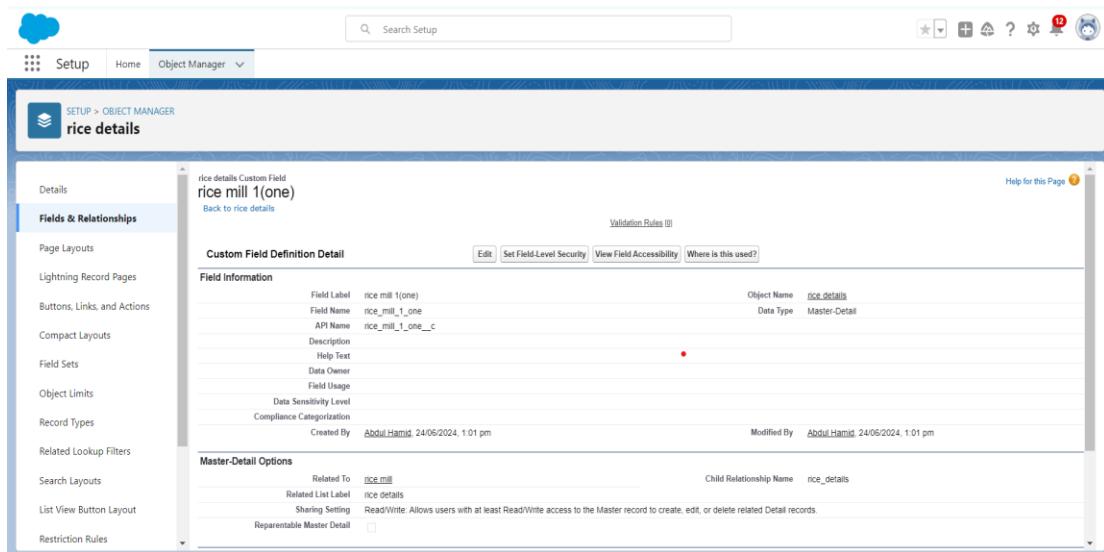
Repeat Steps for Rice Mill Object:

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

Define Field Properties for Rice Mill:

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





Activity 3: Creating a Master-Detail Relationship

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

Navigate to Object Manager:

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

Create a New Field:

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

Select Data Type:

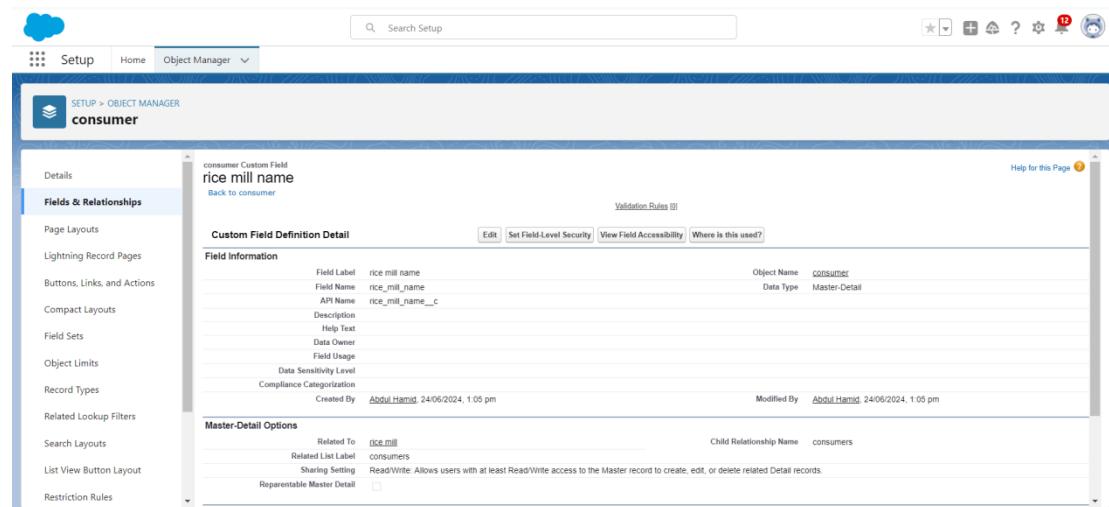
- Select **Master-Detail Relationship** as the data type.
- Click **Next**.

Relate to Rice Mill Object:

- Select the related object **Rice Mill**.
- Click **Next**.

Define Field Properties:

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



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

Navigate to Object Manager:

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

Create a New Field:

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

Select Data Type:

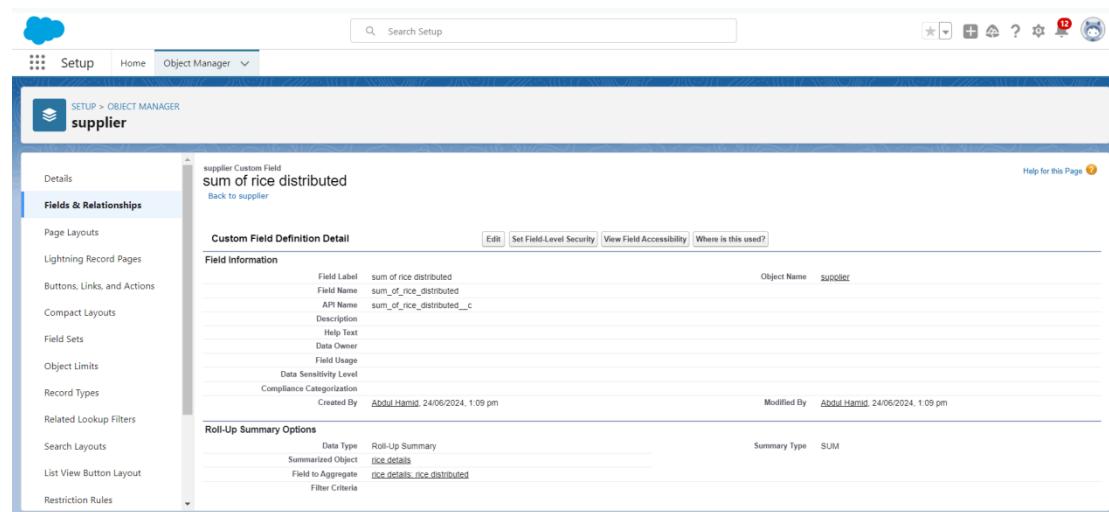
- Select the data type as **Roll-up Summary**.
- Click **Next**.

Define Field Properties for Supplier:

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

Configure Roll-up Summary for Supplier:

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

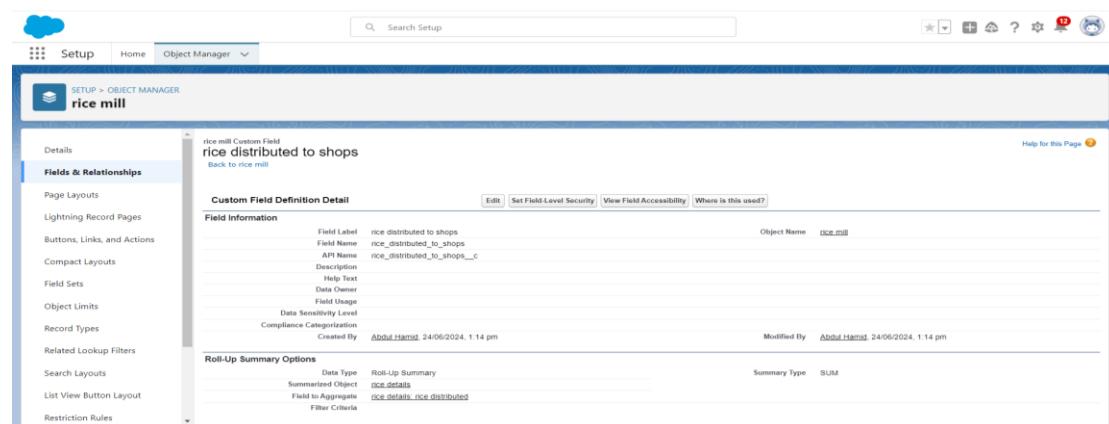


Repeat Steps for Rice Mill Object:

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

Configure Roll-up Summary for Rice Mill:

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



Additional Steps for Consumer Object

Create the Field:

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

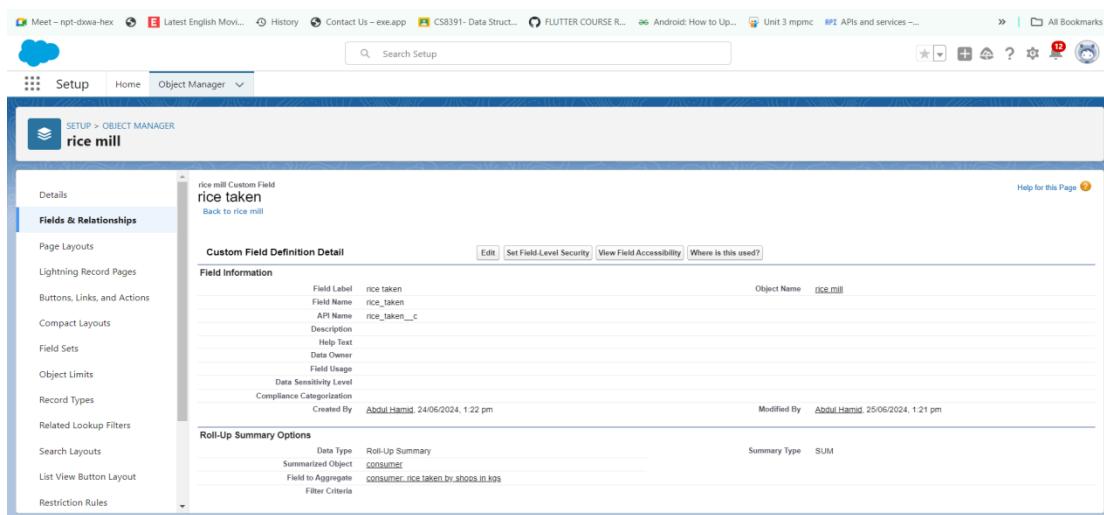
Repeat Steps for Rice Mill Object:

- Follow the same steps from 1 to 3 for the Rice Mill object.

- Give the Field Label as **Rice Taken**. The Field Name will be auto-generated.
- Click **Next**.

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

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



Activity 5: Creating Fields in Objects

Creating the number field in the Rice Details object.

Navigate to Setup:

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

Edit Rice Details Object:

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

Create New Field:

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

Select Data Type:

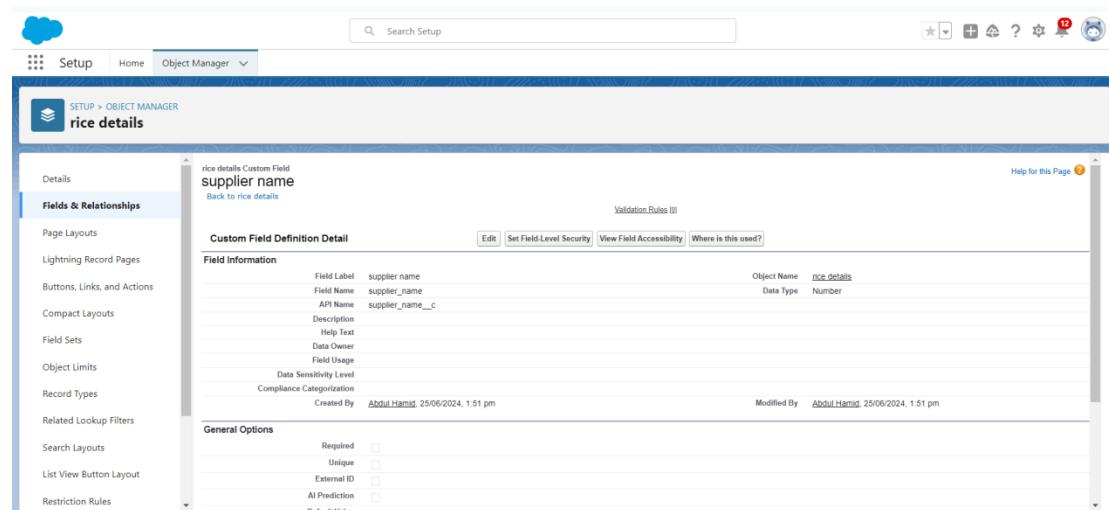
- Choose "**Number**" as the data type for the field.
- Click "**Next**."

Define Field Properties:

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

Proceed with Creation:

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



Activity 6: Creating Fields in Rice Mill Objects

Navigate to Setup:

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

Edit Rice Mills Object:

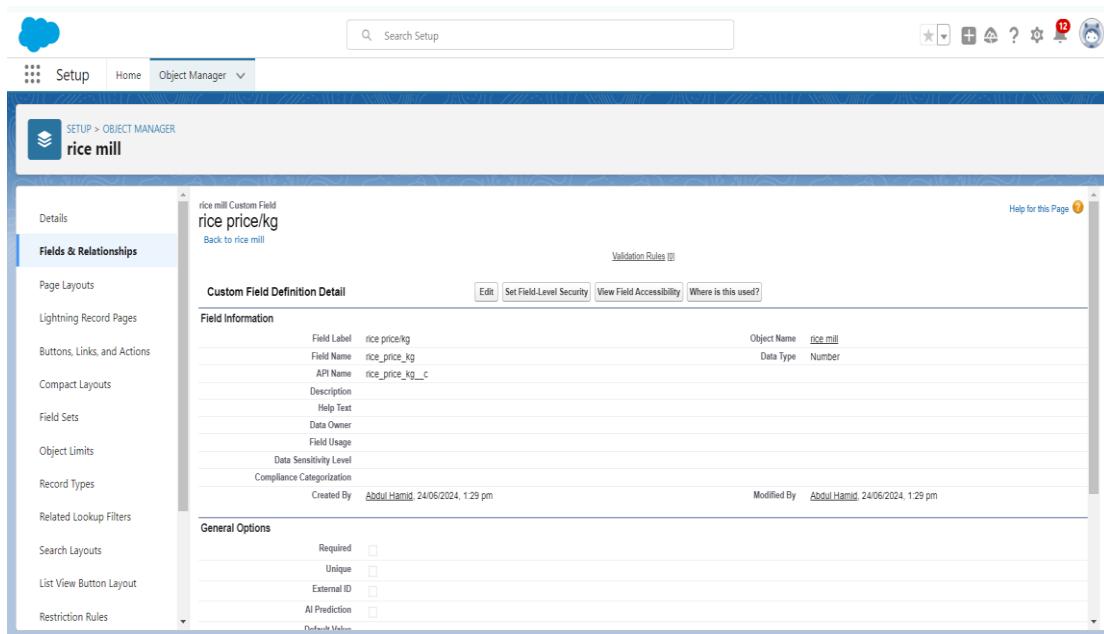
- In Object Manager, find and select "Rice Mills" from the list of objects.
- Click on "Fields & Relationships."

Create New Field:

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

Select Data Type:

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



Activity 7: Creating Fields in Consumer Objects

Navigate to Setup:

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

Edit Consumer Object:

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

Create New Field For First Name:

The screenshot shows the Salesforce Object Manager interface. The left sidebar is collapsed. The main area displays the 'consumer' object details. A new custom field named 'First name' is being created under the 'Fields & Relationships' tab. The 'Field Information' section shows the field label as 'First name', field name as 'First_name', API name as 'First_name_c', and data type as 'Text'. The 'General Options' section includes checkboxes for 'Required', 'Unique', 'Case Sensitive', 'External ID', and 'Default Value'. The 'Validation Rules' section is empty. The right side of the screen shows standard Salesforce navigation and help icons.

Create New Field For Last Name:

This screenshot shows the continuation of creating a new custom field for the 'consumer' object. The 'Last name' field has been added to the list. It has the same field information as the 'First name' field: field label 'Last name', field name 'Last_name', API name 'Last_name_c', and data type 'Text'. The 'General Options' section is identical to the first field. The right side of the screen shows standard Salesforce navigation and help icons.

Create New Field For Email :

The screenshot shows the Salesforce Object Manager interface for creating a new custom field. The object selected is 'consumer'. The field being created is named 'email' with the API name 'email__c'. The field type is 'Email'. Other details like Help Text, Data Owner, and Data Sensitivity Level are visible. The field is required and has a default value. It was created by Abdul Hamid on 24/06/2024 at 1:37 pm.

Create New Field For Rice Taken By Shops:

The screenshot shows the Salesforce Object Manager interface for creating a new custom field. The object selected is 'consumer'. The field being created is named 'Rice taken by shops' with the API name 'Rice_taken_by_shops__c'. The field type is 'Number'. Other details like Help Text, Data Owner, and Data Sensitivity Level are visible. The field is required and has a default value. It was created by Abdul Hamid on 24/06/2024 at 1:48 pm.

Create New Field For Rice Type:

The screenshot shows the Salesforce Object Manager interface for creating a new custom field. The object selected is 'consumer'. The field being created is named 'Rice type' with the API name 'Rice_type__c'. The field type is 'Picklist'. Other details like Help Text, Data Owner, and Data Sensitivity Level are visible. The field is required and has a default value. It was created by Abdul Hamid on 24/06/2024 at 1:41 pm.

Create New Field For Phone Number:

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'consumer'. On the left, a sidebar lists various customization options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The central panel displays a 'Custom Field Definition Detail' for a field named 'Phone number'. The 'Field Information' section shows the field label as 'Phone number', field name as 'Phone_number', and API name as 'Phone_number_c'. The 'Object Name' is 'consumer' and the 'Data Type' is 'Phone'. The 'General Options' section indicates the field is required. The 'Validation Rules' section has a 'New' button. The bottom right corner of the page has a 'Help for this Page' link.

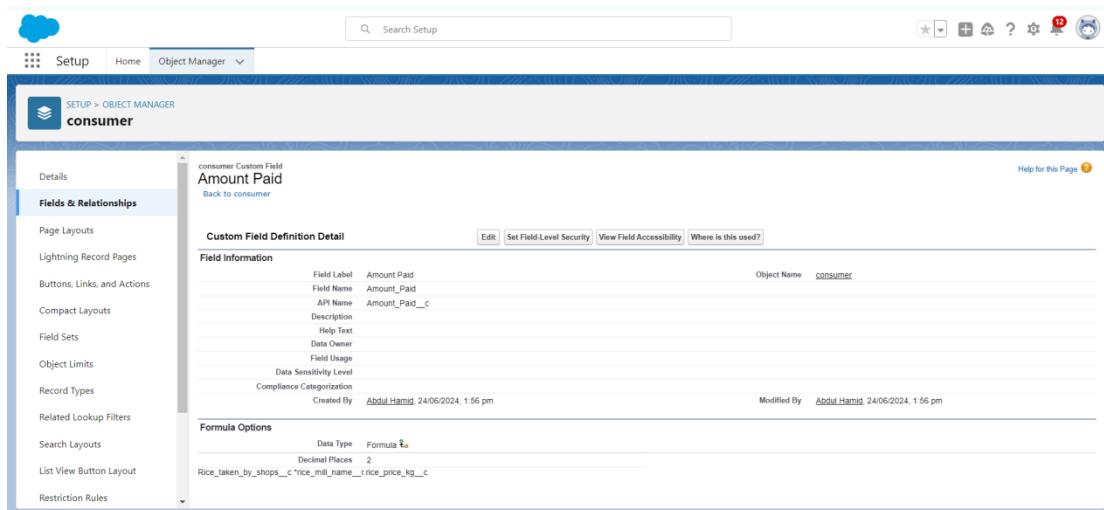
Create New Field For Mode Of Payment:

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'consumer'. On the left, a sidebar lists various customization options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The central panel displays a 'Custom Field Definition Detail' for a field named 'Mode of payment'. The 'Field Information' section shows the field label as 'Mode of payment', field name as 'Mode_of_payment', and API name as 'Mode_of_payment_c'. The 'Object Name' is 'consumer' and the 'Data Type' is 'Picklist'. The 'General Options' section indicates the field is required. The 'Picklist Options' section has a note: 'Restrict picklist to the values defined in'. The bottom right corner of the page has a 'Help for this Page' link.

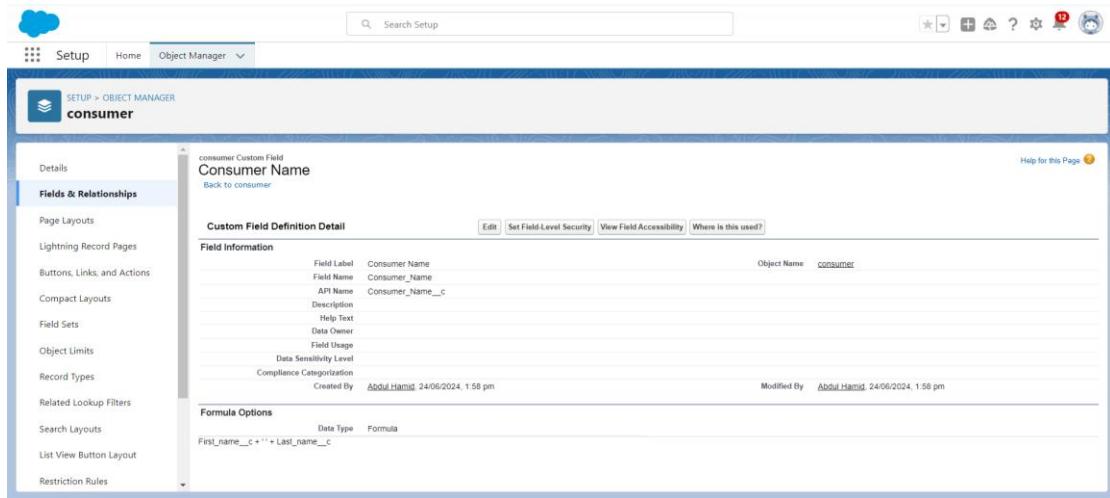
Activity 8: Creating Cross Object Formula Field in Consumer Object

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

- ❖ Go to setup → click on Object Manager → type object name (consumer) in the search bar
Click on Fields & Relationships → click on New.
- ❖ Select Data type as “Formula” and click Next.
- ❖ Give Field Label and Field Name as “Amount Paid” and select formula return type as “Number” Formula: `rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c`



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



Activity 9: Creating the Validation Rule

Improve the quality of your data using validation rules. Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of “True” or “False”. Validation rules also include an error message to display to the user when the rule returns a value of “True” due to an invalid value.

Creating the Validation Rule for Phone Number Field in Consumer Object

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

The screenshot shows the Salesforce Setup interface for the 'consumer' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the 'Validation Rule Detail' for 'consumer'. The validation rule is named 'Phonenumberoremailblankrule' and has the formula 'OR(ISBLANK(Phone_number__c), ISBLANK(email__c))'. The error message is 'please fill in your phone number.' It is marked as Active and was created by 'Abdal Hamid' on 24/06/2024 at 2:00 pm.

Overall Supplier Fields

The screenshot shows the Salesforce Setup interface for the 'supplier' object. The left sidebar lists various setup categories. The main content area displays the 'Fields & Relationships' section, which includes fields like 'Created By', 'Last Modified By', 'Owner', 'sum of rice distributed', and 'supplier Name'. The 'sum of rice distributed' field is a Roll-Up Summary (SUM rice details). The 'supplier Name' field is of type Text(80) and is indexed.

Overall Rice Mills Fields

The screenshot shows the Salesforce Setup interface for the 'rice mill' object. The left sidebar lists various setup categories. The main content area displays the 'Fields & Relationships' section, which includes fields like 'Created By', 'Last Modified By', 'Owner', 'rice distributed to shops', 'rice mill Name', 'rice price/kg', and 'rice taken'. The 'rice distributed to shops' field is a Roll-Up Summary (SUM rice details). The 'rice mill Name' field is of type Name and is an Auto Number. The 'rice price/kg' field is of type Number(5, 0).

Overall Rice Details Field

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

Overall Consumer Fields

FIELD LABEL	FIELD NAME	DATA TYPE
First name	First_name_c	Text(20)
Last Modified By	LastModifiedById	Lookup(User)
Last name	Last_name_c	Text(20)
Mode of payment	Mode_of_payment_c	Picklist
Phone number	Phone_number_c	Phone
rice mill name	rice_mill_name_c	Master-Detail(rice mill)
Rice taken by shops	Rice_taken_by_shops_c	Number(5, 0)
rice taken by shops in kgs	rice_taken_by_shops_in_kgs_c	Number(18, 0)
Rice type	Rice_type_c	Picklist

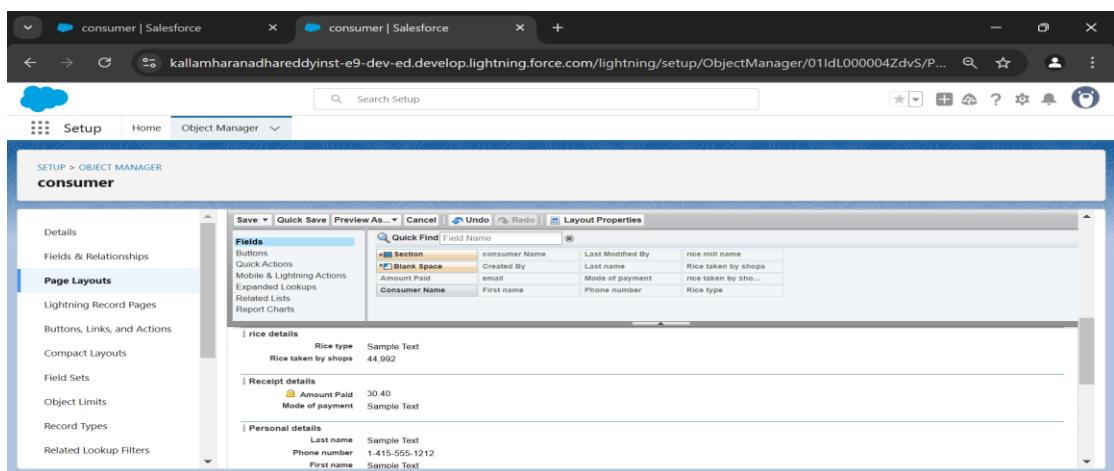
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid_c	Formula (Number)		
consumer Name	Name	Auto Number		
Consumer Name	Consumer_Name_c	Formula (Text)		
Created By	CreatedById	Lookup(User)		
email	email_c	Email		
First name	First_name_c	Text(20)		
Last Modified By	LastModifiedById	Lookup(User)		
Last name	Last_name_c	Text(20)		
Mode of payment	Mode_of_payment_c	Picklist		

Milestone 6: Page Layouts

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

Activity 1: Creating the Page Layout

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



The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The left sidebar lists various setup categories, and the main content area displays the 'Page Layouts' for the 'consumer' object. The table shows two page layouts: 'consumer Layout' and 'personal details'. Both were created by Abdul Hamid on 24/06/2024 at 12:01 pm and modified on 25/06/2024 at 1:05 pm.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
consumer Layout	Abdul Hamid, 24/06/2024, 12:01 pm	Abdul Hamid, 25/06/2024, 1:05 pm
personal details	Abdul Hamid, 24/06/2024, 2:29 pm	Abdul Hamid, 26/06/2024, 8:58 pm

Milestone 7: Profiles

A profile is a group/collection of settings and permissions that define what a user can do in Salesforce. Profiles control object permissions, field permissions, user permissions, tab settings, app settings, Apex class access, Visualforce page access, page layouts, record types, login hours, and login IP ranges. You can define profiles by the user's job function. For example, System Administrator, Developer, Sales Representative.

Types of Profiles in Salesforce

1. Standard Profiles

By default, Salesforce provides the following standard profiles:

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

2. Custom Profiles

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

Activity 1: Owner Profile

To create a new profile:

- Go to Setup → type "Profiles" in the quick find box → click on **Profiles** → clone the desired profile (**Standard User**) → enter profile name (**Owner**) → Save.
- Scroll down to Custom Object Permissions and give access permissions for consumers, **rice details**, **rice mill**, and **suppliers** objects as mentioned in the below diagram.
- Give access and **save** it.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar shows 'Users' and 'Profiles'. The main area has a search bar and a table for 'Profiles'. Below the table are sections for 'Custom Object Permissions' (listing 'consumers' and 'rice details' with their respective access levels) and 'Session Settings' (set to 2 hours of inactivity). At the bottom is a 'Password Policies' section.

Activity 2: Employer Profile

To create a new profile:

- Go to Setup → type "Profiles" in the quick find box → click on Profiles → clone the desired profile (**Standard Platform User**) → enter profile name (Employer) → Save.
- While still on the profile page, click Edit.
- Select the Custom App settings as **default** for the rice mill.
- Scroll down to Custom Object Permissions and give access permissions for **consumer**, **rice details**, **rice mill**, and **suppliers** objects as mentioned in the below diagram. Click **Save**.

This screenshot shows the same Salesforce Setup interface as the previous one, but the 'rice details' profile has been modified. In the 'Custom Object Permissions' section, the 'rice mill' and 'supplier' objects now have checked boxes under 'Read', 'Create', 'Edit', and 'Delete' columns, in addition to 'View All' and 'Modify All'. The rest of the interface remains the same.

Activity 3: Workers Profile

To create a new profile:

- Go to Setup → type "**Profiles**" in the quick find box → click on Profiles → clone the desired profile (**Standard Platform User**) → enter profile name (**Workers**) → Save.
- While still on the profile page, click Edit.
- Select the Custom App settings as **default** for the rice mill.
- Scroll down to Custom Object Permissions and give access permissions for **consumer**, **rice details**, **rice mill**, and **suppliers** objects as mentioned in the below diagram. Click **Save**.

The screenshot shows the Salesforce Setup interface for managing Profiles. The top navigation bar includes links for Meet, Latest English Movie, History, Contact Us, CS8391, FLUTTER COURSE R..., Android: How to Up..., Unit 3 mpmc, API, and All Bookmarks. The main header says "SETUP Profiles". On the left, there's a sidebar with "Setup", "Home", and "Object Manager" buttons, and a search bar with "profile". Below the sidebar, it says "Didn't find what you're looking for? Try using Global Search." The main content area is titled "Profiles" and shows a table of custom object permissions. The table has sections for Contacts, Push Topics, Sellers, Streaming Channels, and User External Credentials. Under "Custom Object Permissions", there are two tables: one for "consumers" and one for "rice details". The "consumers" table has columns for Read, Create, Edit, Delete, View All, and Modify All. The "rice details" table also has these columns. To the right, there are similar tables for "rice mills" and "supplier". At the bottom, there are sections for "Session Settings" (Session Times Out After: 2 hours of inactivity) and "Password Policies" (User passwords expire in: 90 days, etc.).

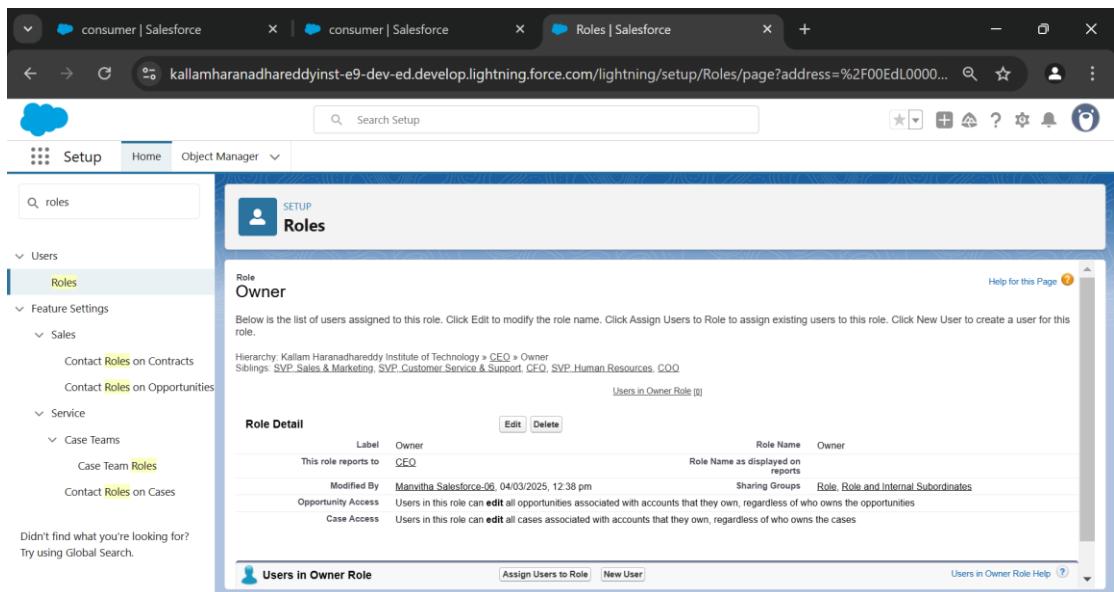
Milestone 8: Role & Role Hierarchy

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

Activity 1: Creating Owner Role

Creating Owner Role:

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



Activity 2: Creating Employer Roles

Creating Another Two Roles Under Manager:

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

- Click the plus on CEO role, and click the plus on Owner, and click Add Role under Employer.
- Give Label as “Worker” and Role Name gets auto-populated. Then click on Save.

The screenshot shows the Salesforce Setup Roles page. The left sidebar has a search bar and navigation links for Setup, Home, and Object Manager. Under the 'Users' section, 'Roles' is selected. A sub-menu shows 'Feature Settings' and 'Sales' categories, with 'Contact Roles on Contracts' and 'Contact Roles on Opportunities' highlighted in yellow. Below these are 'Service' and 'Case Teams' sections, each with a 'Contact Roles' link. A note at the bottom says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Creating the Role Hierarchy'. It displays a tree view of roles under 'Your Organization's Role Hierarchy'. The hierarchy includes:

- Accenture** (parent)
 - CEO** (child)
 - CFO** (child)
 - CIO** (child)
 - owner** (child)
 - employer** (child)
 - worker** (child)
 - SVP_Customer Service & Support** (child)
 - Customer Support_International** (child)
 - Customer Support_North America** (child)

 There are 'Edit', 'Del', and 'Assign' buttons next to each role entry. A 'Show in tree view' dropdown is visible on the right side of the hierarchy list.

Milestone 9: Users

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

Activity 1: Create User

- Go to Setup → type "Users" in the quick find box → select Users → click New User.
- Fill in the fields:
 - First Name: **Vicky**
 - Last Name: **Y**
 - Alias: **Vy**
 - Email ID: **218x1a1222@khitguntur.ac.in**
 - Username: **218x1a1222@khitguntur.com**
 - Nickname: **User17410726749142770587**
 - Role: **Owner**
 - User License: **Salesforce**
 - Profile: **Owner**
 - Save it.

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded to show the 'Users' section, with 'User Management Settings' and 'Users' selected. The main content area displays the 'Users' setup page for a user named 'vicky y'. The 'User Detail' section shows the following information:

Name	vicky y	Role	Owner
Alias	vy	User License	Salesforce
Email	218x1a1222@khitguntur.ac.in [Verify]	Profile	owner
Username	218x1a1222@khitguntur.com	Active	<input checked="" type="checkbox"/>
Nickname	User17410726749142770587	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>

Activity 2: Creating Another Users

- Go to Setup → type "Users" in the quick find box → select Users → click New User.
- Fill in the fields:
 - First Name: **Babu**
 - Last Name: **b**
 - Alias: **bb**
 - Email ID: **218x1a1234@khitguntur.ac.in**
 - Username: **218x1a1234@khitguntur.com**
 - Nickname: **User17410734879048411952**
 - Role: **Employer**
 - User License: **Salesforce Platform**
 - Profile: **Standard Platform User**
 - Save it.

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

Setup Home: consumer | Salesforce

Current Page: Users | Salesforce

URL: kallamharanadhareddyinst-e9-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=...

Search Bar: Search Setup

Left Navigation: Setup, Home, Object Manager, Q user, Users, User Management Settings, Users, Feature Settings, Data.com, Prospectors, Service, Embedded Services.

Central Content:

- Section Header:** SETUP Users
- User Detail:** Babu b
- Fields:**

Name	Babu b	Role	employer
Alias	bb	User License	Salesforce Platform
Email	218x1a1234@khitguntur.ac.in [Verify]	Profile	Standard Platform User
Username	218x1a1234@khitguntur.com	Active	<input checked="" type="checkbox"/>
Nickname	User17410734879048411952	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
- Help:** User Profile Help for this Page

Activity 3: Create Another Users

- Go to Setup → type "Users" in the quick find box → select Users → click New User.
- Fill in the fields:
 - First Name: **jathin**
 - Last Name: **j**
 - Alias: **jj**
 - Email ID: **218x1a1244@khitguntur.ac.in**
 - Username: **218x1a1244@khitguntur.com**
 - Nickname: **User17410738123206030598**
 - Role: **Worker**
 - User License: **Salesforce Platform**
 - Profile: **Standard Platform User**
 - **Save it.**

The screenshot shows the Salesforce Setup interface. The top navigation bar has tabs for Roles | Salesforce, Users | Salesforce, and Developer Edition with Agent. The current page is ManageUsers/page?address=... . The main header says 'SETUP' and 'Users'. On the left, there's a sidebar with links like Setup Home, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, and ADMINISTRATION. Under ADMINISTRATION, 'Users' is expanded. The main content area shows a user record for 'jathin j'. The 'User Detail' section includes fields for Name (jathin j), Alias (jj), Email (218x1a1244@khitguntur.ac.in), Username (218x1a1244@khitguntur.com), Nickname (User17410738123206030598), Title, Company, Department, Division, Address, and Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata). Buttons for Edit, Sharing, Reset Password, Freeze, and View Summary are at the top of the detail section. To the right, there's a grid of checkboxes for various user roles and profiles. A 'User Profile Help for this Page' link is also visible.

Milestone 10: Permission Sets

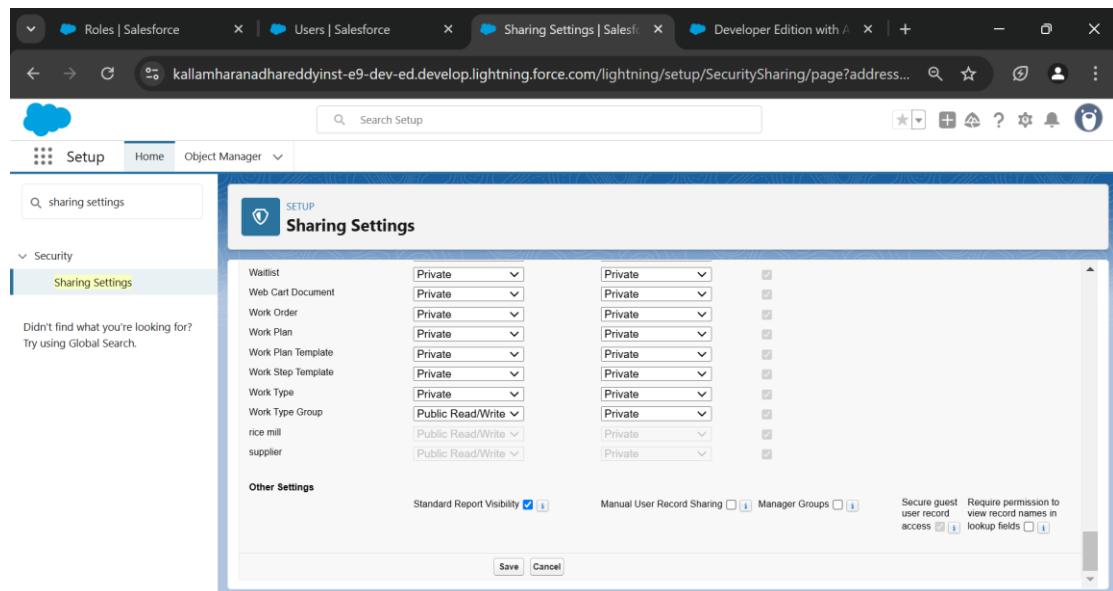
A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles and are the recommended way to manage your users' permissions.

Activity 1: Creating OWD Setting

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

Extra Information:

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



Milestone 11: Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics. Salesforce.com provides a powerful suite of analytic tools to help you organize, view, and analyze your data.

Activity 1: Create Report

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

	Report: rice mills with consumers Copy of New rice mills with consumers Re
Total Records	1
1	consumer: consumer Name ▾

Activity 2: Sharing Report to Owner

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

	Report: rice mills with consumers Copy of New rice mills with consumers Re
Total Records	1
1	rice mill: rice mill Name ▾ consumer: consumer Name ▾ Rice type ▾

Activity 3: Create a Report Folder

Steps to Create a Report Folder:

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

Moving a Report to the New Folder:

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

The screenshot shows the Salesforce Reports interface. At the top, there's a navigation bar with links for 'rice mills', 'rice details', 'consumers', 'supplier', 'Reports' (which is currently selected), and 'Dashboards'. Below the navigation bar, there's a search bar labeled 'Search recent reports...' and buttons for 'New Report' and 'New Folder'. On the left, a sidebar lists categories: 'Recent', 'Created by Me', and 'Private Reports'. Under 'Recent', there are two items: 'Copy of New rice mills with consumers Re' and 'Copy of New rice mills with consumers Re'. Both reports are categorized under 'Private Reports' and were created by 'Manvitha Salesforce-06' on '4/3/2025, 3:15 pm' and '4/3/2025, 3:12 pm' respectively. There are also small downward arrows next to each report entry.

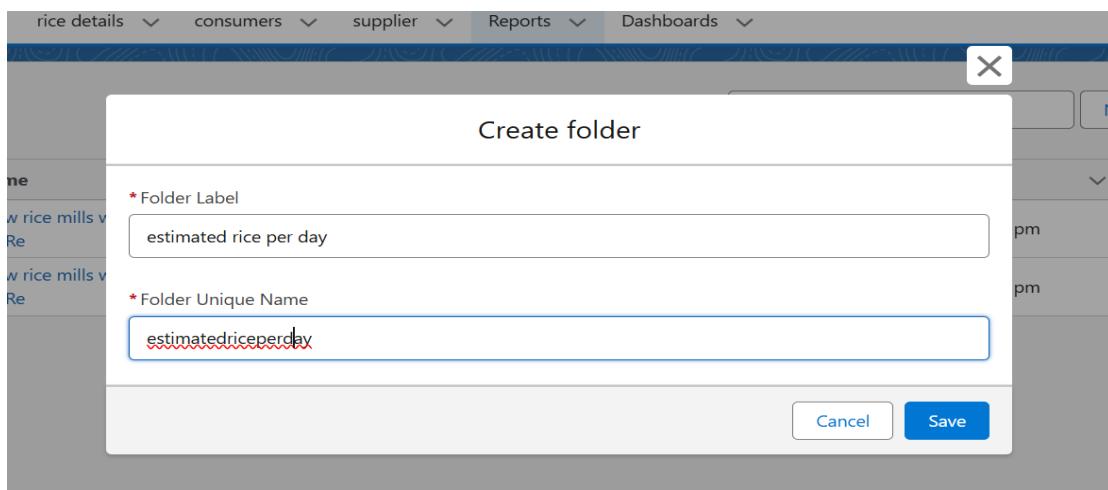
Milestone 12: Dashboards

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

Activity 1: Create Dashboard Folder

Steps to Create a Dashboard Folder:

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



Activity 2: Create Dashboard

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

First Component Details:

- Display as: Vertical Bar Chart
- X-axis: Rice Taken by Shops
- Y-axis: Sum of Amount
- Y-axis Range: Automatic
- Sort by: Rice Taken by Shops
- Component Theme: Dark

Second Component Details:

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

The screenshot shows a Salesforce Lightning component titled "Copy of New rice mills with consumers Re". The component displays a table with three columns: "rice mill: rice mill Name", "consumer: consumer Na...", and "Rice type". The data in the table is as follows:

rice mill: rice mill Name	consumer: consumer Na...	Rice type
rice-002	consumers-001	1.basmati

Below the table, there is a link labeled "View Report (Copy of New rice mills with consumers Re)". The component has a dark theme and includes standard Salesforce navigation elements like a search bar, a top menu with "MY RICE", and various report and dashboard links.

Milestone 13: APEX

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

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

Creating Classes :

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

- Class:**

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

- Object:**

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

Activity 1:Creating an Apex Class(ConsumerRecord)

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

```

1 public class ConsumerRecord {
2     public static void sendEmailNotification (List<consumer__c> con){
3         for(consumer__c c:con)
4         {
5             Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
6             email.setToAddresses( new List<String>{c.email__c});
7             email.setSubject('Welcome to our company');
8             email.setPlainTextBody('Dear ' + ' ' + ',\n\nWelcome to MY RICE!'+'You have been seen as a valuable customer
9             'We are proud to associate with valuable customers like you and we look forward
10             +'So why taking step back, take a leap of faith and shop with us more, while we
11             'Thankyou for buying '+ '' +'Here are some of the products that are brought by us
12             Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
13         }
14     }
15 }
16

```

Activity 2:Creating an Apex Trigger

How to create a new trigger :

While still in the trailhead account, navigate to the gear icon in the top right corner.
 Click on developer console and you will be navigated to a new console window.
 Click on the File menu in the toolbar, and click on new? Trigger.
 Enter the trigger name and the object to be triggered.

Syntax For creating trigger :

The syntax for creating trigger is :

```

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

```

```

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

```

CONCLUSION :

In conclusion, the implementation of a CRM application for the wholesale rice mill in Salesforce offers a strategic approach to optimizing sales, customer relationships, and overall operational efficiency. By leveraging Salesforce's robust platform, the rice mill can streamline its sales processes, enhance communication with customers, and maintain a centralized database of key client information. This will facilitate improved decision-making, better customer service, and more personalized interactions.

The integration of key features such as lead and opportunity tracking, automated workflows, and real-time analytics will empower the sales team to manage and prioritize leads effectively, ensuring timely follow-ups and increased sales conversions. Additionally, Salesforce's reporting and forecasting capabilities will provide valuable insights into business performance and help in proactive planning.

Furthermore, the CRM system enhances collaboration across departments, ensuring a seamless flow of information between sales, customer service, and management. As the wholesale rice mill expands, the CRM will scale to meet the growing needs of the business, providing long-term value and positioning the company for continued success in the competitive market.

By adopting Salesforce for CRM, the wholesale rice mill stands to benefit from a more organized, customer-focused approach, ultimately driving growth, profitability, and customer satisfaction.