

CRM APPLICATION FOR WHOLESALE RICE MILL

Overview :

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

Features and Functionality

Reporting and Dashboards

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

RollupSummary 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.
- IsBlank 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 deals 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: [Salesforce Developer Signup](#)

Fill Out the Signup Form

- First Name : Ponnuru Sravya
- Last Name : Karthika
- Email : sravyakarthikaponnuru@gmail.com
- Role : Developer
- Company : LBRCE
- Country : India
- Postal Code : 23050
- Username : sravyakarthikaponnuru@lbrce6.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.

The screenshots show the Salesforce Developer Edition sign-up process:

Initial Sign-up Form (Top Screenshot):

- First Name*: Ponnuru Sravya
- Last Name*: Karthika
- Email*: sravyakarthikaponnuru@gmail.com
- Role*: Developer
- Company*: LBRCE

Continuation of Sign-up (Bottom Screenshot):

- State/Province*: Andhra Pradesh
- Postal Code*: 521230
- Username*: sravyakarthikaponnuru@lbrce6.com
- I agree to the [Main Services Agreement – Developer Services](#) and [Salesforce Program Agreement](#).
- Marketing Preferences: Yes, I would like to receive marketing communications regarding Salesforce products, services, and events. I can unsubscribe at any time.
- Privacy Statement: By registering, you confirm that you agree to the processing of your personal data by Salesforce as described in the [Privacy Statement](#).
- Action Buttons: [Sign me Up](#), [Log in](#)

Activity 2: Account Activation

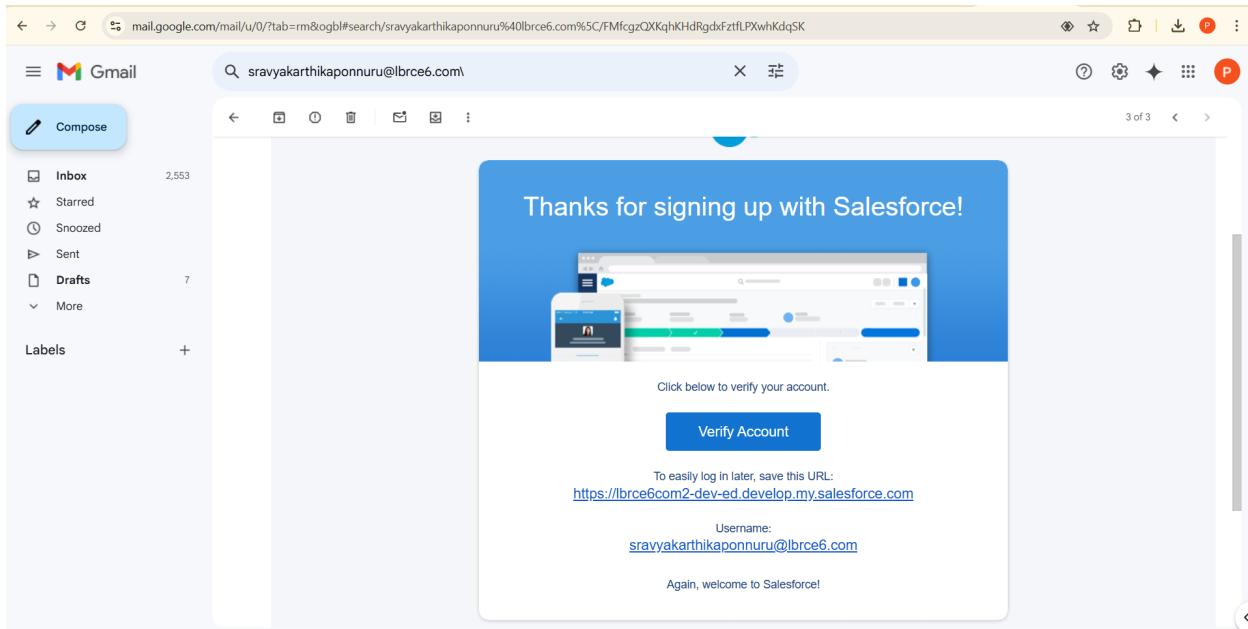
After creating your Salesforce Developer Account, you need to activate it. Follow these steps to activate your account:

Check Your Email

- Go to the inbox of the emailaddress you used while signingup. The verification emailmay 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 questionfor account recovery.
- Click on "Change Password".



Milestone 2 - Object

What Is an Object?

Salesforce objectsare database tables that permityou to store data that is specificto an organization.

Types of Salesforce Objects

Salesforce objects are of two types:

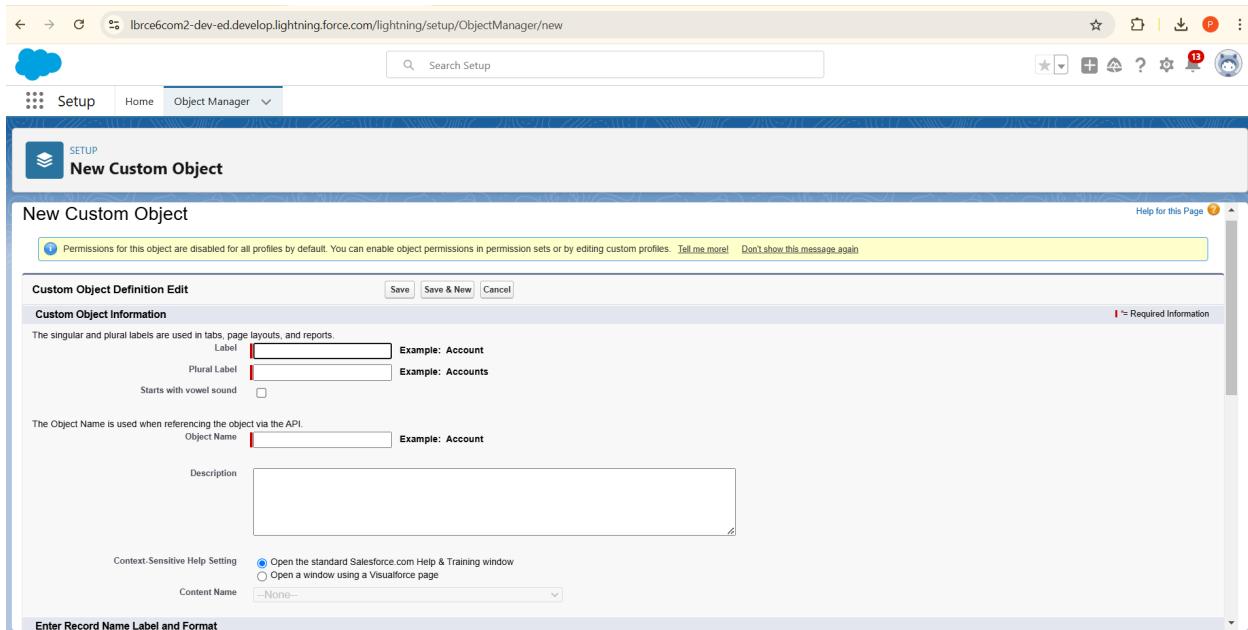
- Standard Objects: Standard objects are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- Custom Objects: Custom objects are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide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

To Navigate to Setup Page:

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

To Create an Object:

- From the setup page, click on ObjectManager
- Click on Create
- Click on Custom Object
- On the CustomObject 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 ObjectManager.
- Click on Create.
- Click on Custom Object.

Define the Custom Object:

- Enter the Label Name : Supplier.
- Enter the Plural Label Name : Suppliers.
- Enter the RecordName Label and Format:

- Record Name: Supplier Name
- Data Type:Text

Set Additional Options:

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

Save the Custom Object:

- Click on Save.

The screenshot shows the Salesforce Object Manager interface for the 'supplier' custom object. The 'Details' tab is active, displaying the following configuration settings:

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

The sidebar on the left lists other customization options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules.

Edit Custom Object
supplier

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: supplier **Example:** Account
Plural Label: supplier **Example:** Accounts
Starts with vowel sound:

Object Name is used when referencing the object via the API.
Object Name: supplier **Example:** Account

Description:

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window
 Open a window using a Visualforce page

Content Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: supplier Name **Example:** Account Name
Data Type: Text **Warning:** If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter History
- Enable Licensing [i](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status

Deployed [What is this?](#)

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search

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 setuppage, 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
- **DisplayFormat**: rice-{000}
- **StartingNumber**: 1

Set Additional Options:

- Click on **Allow Reports**.
- Click on **Track FieldHistory**.
- Click on **Allow Search**.

Save the Custom Object:

- Click on **Save**.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "SETUP > OBJECT MANAGER" followed by "rice mill". On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled "Details" and contains fields for API Name (rice_mill_c), Singular Label (rice mill), and Plural Label (rice mills). It also includes sections for Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). At the bottom right are "Edit" and "Delete" buttons.

The screenshot shows the "Edit Custom Object" dialog for the "rice mill" object. The title bar says "Edit Custom Object rice mill". The dialog has tabs for "Custom Object Definition Edit" (selected) and "Custom Object Information". Under "Custom Object Information", there are fields for Label (rice mill) and Plural Label (rice mills), both with examples of Account and Accounts respectively. There is also a checkbox for Starts with vowel sound. Under "Custom Object Definition Edit", there is a field for Object Name (rice_mill) with an example of Account. Below these are sections for Description, Context-Sensitive Help Setting (with options for standard help or Visualforce page), and Content Name (set to None). At the bottom, there is a note about Record Name and a "Help for this Page" link.

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 ObjectManager.
- 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 Object :

- Click on AllowReports.
- Click on Track Field History.
- Click on AllowSearch.

Save the Custom Object:

- Click on Save.

The image contains two screenshots of the Salesforce Setup Object Manager interface, showing the configuration of a custom object named 'consumer'.

Screenshot 1: Object Details View

This screenshot shows the 'Details' tab of the 'consumer' object's configuration. The API Name is set to 'consumer__c'. The singular label is 'consumer' and the plural label is 'consumers'. Other settings include:

- Description: [empty]
- Enable Reports: ✓
- Track Activities: ✓
- Track Field History: ✓
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

Screenshot 2: Custom Object Definition Edit

This screenshot shows the 'Custom Object Definition Edit' page for the 'consumer' object. It includes the following fields:

- Custom Object Information:**
 - Label: consumer (Example: Account)
 - Plural Label: consumers (Example: Accounts)
 - Starts with vowel sound:
- Object Name:** Object Name: consumer (Example: Account)
- Description:** [empty]
- Context-Sensitive Help Setting:**
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
- Content Name:** None

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 ObjectManager.
- 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.

lbrc6com2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01dM000003hZf7/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
rice details

Details

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

Edit Delete

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

Details

lbrc6com2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01dM000003hZf7/edit?address=%2F01dM000003hZf7%2Fe%3FretURL%3D%25Fsetup%25Fobject%25F0...

Setup Home Object Manager

SETUP > OBJECT MANAGER
rice details

Edit Custom Object
rice details

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: rice details Example: Account
Plural Label: rice details Example: Accounts
Starts with vowel sound:

The Object Name is used when referencing the object via the API.
Object Name: rice_details Example: Account

Description:

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window
 Open a window using a Visualforce page
Content Name: None

Enter Record Name Label and Format

Help for this Page ?

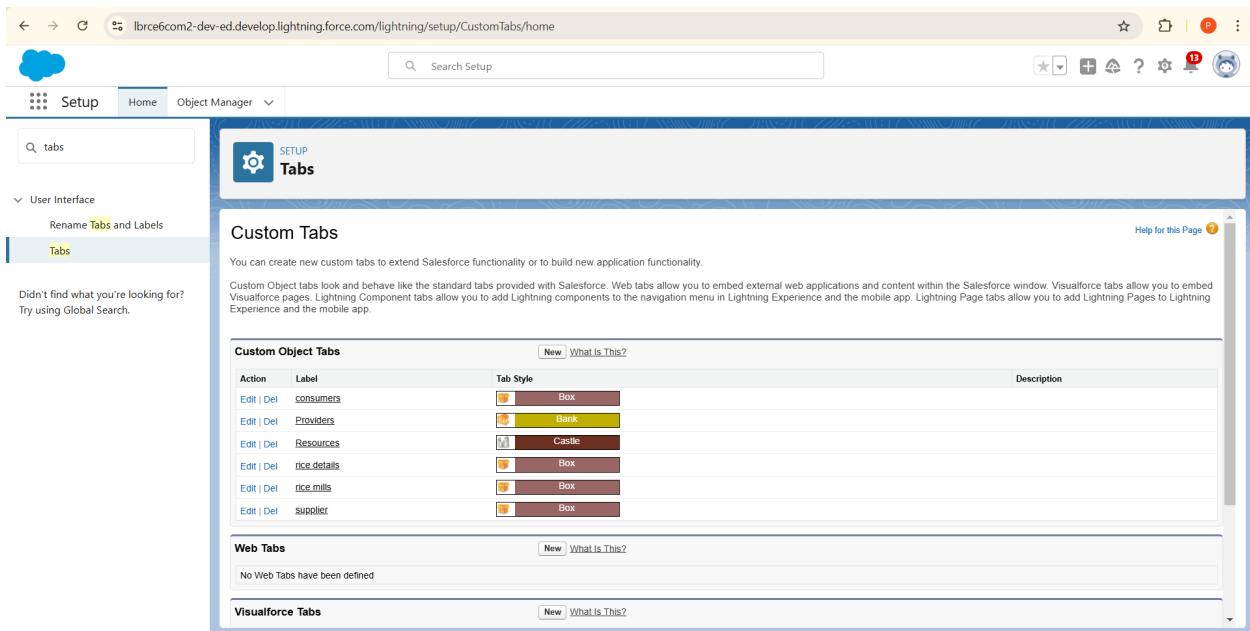
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules

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.



The screenshot shows the Salesforce Setup page with the 'Tabs' section selected under 'User Interface'. The main content area displays the 'Custom Tabs' section, which allows users to create new custom tabs to extend Salesforce functionality or build new application functionality. It includes sections for 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. The 'Custom Object Tabs' section lists several tabs with their labels and styles:

Action	Label	Tab Style	Description
Edit Del	consumers	Box	
Edit Del	Providers	Bank	
Edit Del	Resources	Castle	
Edit Del	rice details	Box	
Edit Del	rice mills	Box	
Edit Del	supplier	Box	

Activity 1: Creating a Custom Tab (Supplier)

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

1. Navigate to Setup Page:

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

2. Create a New Custom Object Tab:

- Click on New under the Custom Object Tabs section.

3. Select Object and Tab Style:

- Select the Supplier object.

- Choose the tab style.
- Click on Next.

Add to ProfilesPage:

- Keep it as default.
- Click on Next.

Add to Custom App:

- Uncheck the IncludeTab checkbox.

Append Tab to Users' ExistingPersonal Customizations:

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

Save the Custom Tab:

- Click on Save.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. A custom tab for the 'supplier' object has been created. The tab is named 'supplier' and is styled as a 'Box'. The 'Custom Tab Definition Detail' section shows the following information:

Field	Value
Tab Label	supplier
Object	supplier
Description	Ponnuru Sravya Karthika, 02/01/2025, 7:12 pm
Created By	Ponnuru Sravya Karthika
Modified By	Ponnuru Sravya Karthika, 02/01/2025, 7:12 pm

Activity 2: Creating RemainingTabs :

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

lbrc6com2-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01rdM00000QYd2D%3Fsetupid%3DCustomTabs

Setup Home Object Manager

tab

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.

Custom Object Tab
consumers

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

Custom Tab Definition Detail

Tab Label	consumers	Edit Delete
Object	consumer	Tab Style <input checked="" type="radio"/> Box
Description		Splash Page Custom Link
Created By	Ponnuru Sravya Karthika, 02/01/2025, 7:14 pm	Modified By Ponnuru Sravya Karthika, 02/01/2025, 7:14 pm

Help for this Page

lbrc6com2-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01rdM00000QYpdX%3Fsetupid%3DCustomTabs

Setup Home Object Manager

tab

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.

Custom Object Tab
rice mills

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

Custom Tab Definition Detail

Tab Label	rice mills	Edit Delete
Object	rice_mill	Tab Style <input checked="" type="radio"/> Box
Description		Splash Page Custom Link
Created By	Ponnuru Sravya Karthika, 02/01/2025, 7:13 pm	Modified By Ponnuru Sravya Karthika, 02/01/2025, 7:13 pm

Help for this Page

lbrc6com2-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01rdM00000QYdUf%3Fsetupid%3DCustomTabs

Setup Home Object Manager

tab

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.

Custom Object Tab
rice details

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

Custom Tab Definition Detail

Tab Label	rice details	Edit Delete
Object	rice_details	Tab Style <input checked="" type="radio"/> Box
Description		Splash Page Custom Link
Created By	Ponnuru Sravya Karthika, 02/01/2025, 7:15 pm	Modified By Ponnuru Sravya Karthika, 02/01/2025, 7:15 pm

Milestone 4 - The Lightning App

An app is a collection of itemsthat work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other itemsall 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 LightningApp

To create a Lightning app page, follow these steps:

Navigate to App Manager:

- Go to the setup page.
- Search for “App Manager” in theQuick 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 settingsas default.
- Click Next.

Utility Items Page:

- Keep the settingsas default.
- Click Next.

Upload a Photo:

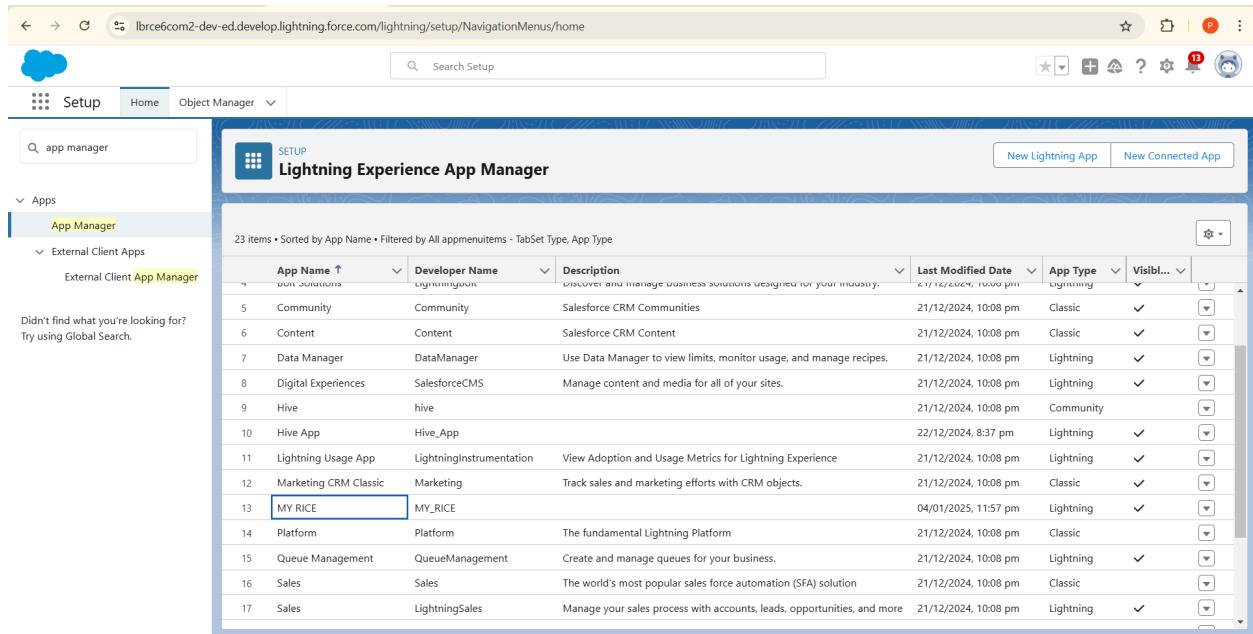
- Upload a photo that is related to your app.

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.

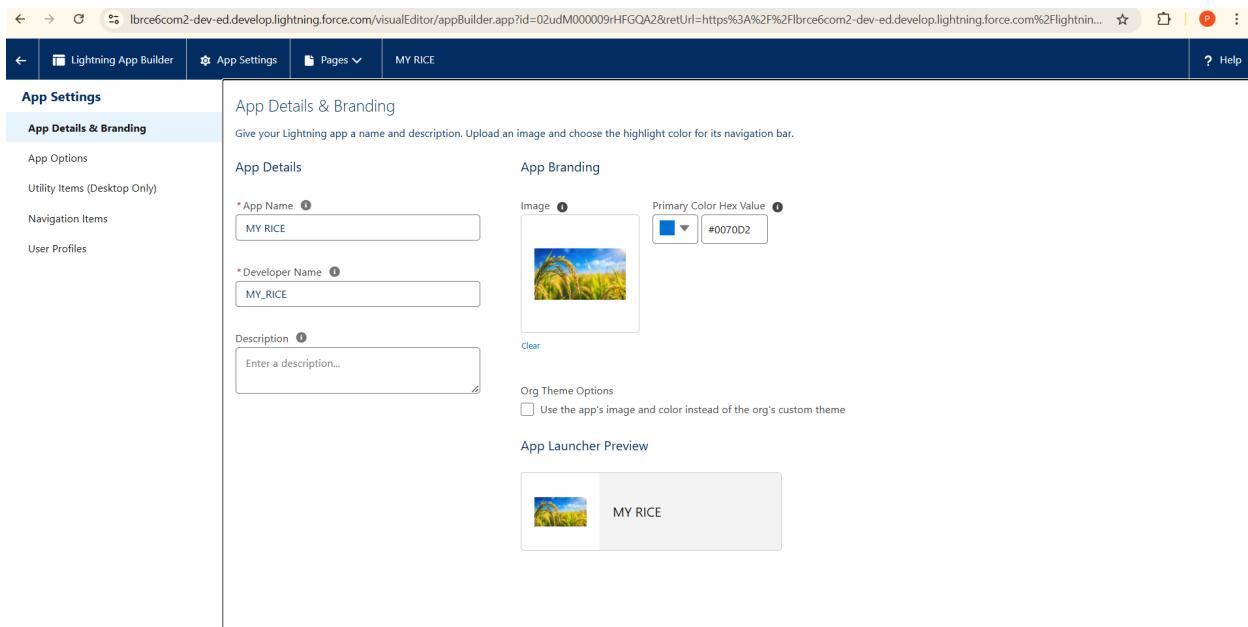
Add User Profiles:

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



The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar has a search bar and navigation links for Setup, Home, and Object Manager. Under 'Apps', 'App Manager' is selected, and 'External Client Apps' is expanded, showing 'External Client App Manager'. A note says ' Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Lightning Experience App Manager' and displays a table of 23 items. The columns are: App Name (sorted), Developer Name, Description, Last Modified Date, App Type, and Visibility. The table includes rows for various Salesforce built-in apps like Community, Content, Data Manager, Digital Experiences, Hive, Hive App, Lightning Usage App, Marketing CRM Classic, and Sales, along with a custom app named 'MY RICE' which is highlighted with a blue border.

App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visibility
Community	Community	Salesforce CRM Communities	21/12/2024, 10:08 pm	Classic	✓
Content	Content	Salesforce CRM Content	21/12/2024, 10:08 pm	Classic	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	21/12/2024, 10:08 pm	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	21/12/2024, 10:08 pm	Lightning	✓
Hive	hive		21/12/2024, 10:08 pm	Community	✗
Hive App	Hive_App		22/12/2024, 8:37 pm	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	21/12/2024, 10:08 pm	Lightning	✓
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	21/12/2024, 10:08 pm	Classic	✓
MY RICE	MY_RICE		04/01/2025, 11:57 pm	Lightning	✓
Platform	Platform	The fundamental Lightning Platform	21/12/2024, 10:08 pm	Classic	✗
Queue Management	QueueManagement	Create and manage queues for your business.	21/12/2024, 10:08 pm	Lightning	✓
Sales	Sales	The world's most popular sales force automation (SFA) solution	21/12/2024, 10:08 pm	Classic	✗
Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	21/12/2024, 10:08 pm	Lightning	✓



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

- Standard Fields
- 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.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Home, Object Manager, and a search bar. The main title is 'rice details'. On the left, a sidebar lists various setup options under 'Fields & Relationships'. The central panel displays the 'Custom Field Definition Detail' for the 'rice distributed' field. The 'Field Information' section shows the field label as 'rice distributed', field name as 'rice_distributed', API name as 'rice_distributed__c', and data type as 'Number'. The 'General Options' section includes checkboxes for Required, Unique, External ID, AI Prediction, and Default Value. A note at the bottom indicates the field was created by Ponnuru Sravya Karthika on 02/01/2025, 7:21 pm.

Activity 2: Creating Junction Object

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

Creating Junction Object: Rice Details with Supplier & Rice

Mill To create a Junction Object:

Navigate to Object Manager:

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

Create a New Field:

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

Select Data Type:

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

Relate to Supplier Object:

- Select the relatedobject 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 1to 3.
- Select the related object Rice Mill.
- Click Next.

Define Field Properties for Rice Mill:

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

The screenshot shows the Salesforce Setup interface for the 'rice details' object. The left sidebar is expanded to show 'Fields & Relationships'. The main content area displays the 'Custom Field Definition Detail' for the 'supplier' field. The 'Field Information' section shows the field label as 'supplier', field name as 'supplier', API name as 'supplier__c', and data type as 'Master-Detail'. The 'Master-Detail Options' section shows it is related to the 'supplier' object, with a sharing setting of 'ReadWrite: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.'

The screenshot shows the Salesforce Setup interface for the 'rice details' object. The left sidebar is expanded to show 'Fields & Relationships'. The main content area displays the 'Custom Field Definition Detail' for the 'rice mill 1(one)' field. The 'Field Information' section shows the field label as 'rice mill 1(one)', field name as 'rice_mill_1_one', API name as 'rice_mill_1_one_c', and data type as 'Master-Detail'. The 'Master-Detail Options' section shows it is related to the 'rice_mill' object, with a sharing setting of 'ReadWrite: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.'

Activity 3: Creating a Master-Detail Relationship

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

Creating Master-Detail Relationship between Consumer & Rice Mill

Object To create a Master-Detail relationship:

Navigate to Object Manager:

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

Create a New Field:

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

Select Data Type:

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

Relate to Rice Mill Object:

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

Define Field Properties:

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

- Click Save.

The screenshot shows the Salesforce Object Manager interface. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area is titled 'consumer Custom Field rice mill name'. It shows the 'Custom Field Definition Detail' for the field 'rice mill name'. Key details include:

- 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: Compliance Categorization.
- Master-Detail Options:** Related To: rice_mill, Related List Label: consumers, Child Relationship Name: consumers.
- Lookup Filter:** Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Activity 4: Creating the Roll-up Summary

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

Creating the Roll-up Summary Field on Supplier & Rice Mill

Objects To create a Roll-up Summary field:

Navigate to Object Manager:

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

Create a New Field:

- Click on Fields & Relationships.

- Click on New.

Select Data Type:

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

Define Field Properties for Supplier:

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

Configure Roll-upSummary for Supplier:

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

Custom Field Definition Detail

Field Information	Object Name
Field Label: sum of rice distributed Field Name: sum_of_rice_distributed API Name: sum_of_rice_distributed_c Description: Help Text: Data Owner: Field Usage: Data Sensitivity Level: Compliance Categorization: Created By: Ponnuru Sravya Karthika 02/01/2025, 7:31 pm	supplier

Roll-Up Summary Options	Summary Type
Data Type: Roll-up Summary Summarized Object: rice details Field to Aggregate: rice details: rice distributed Filter Criteria:	SUM

Repeat Steps for Rice Mill Object:

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

- Give the Field Label as Rice Distributed to Shops. The Field Name will be auto-generated.
- Click Next.

Configure Roll-up Summary for Rice Mill:

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "rice mill". On the left, a sidebar lists various object settings like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions. The central panel displays the "rice mill Custom Field" named "rice distributed to shops". The "Custom Field Definition Detail" section contains the following information:

Custom Field Definition Detail	
Field Information	Object Name: rice_mill
Field Label: rice distributed to shops	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: Ponnuru Sravya.Karthika 02/01/2025, 7:33 pm	Modified By: Ponnuru Sravya.Karthika 02/01/2025, 7:33 pm
Roll-Up Summary Options	
Data Type: Roll-Up Summary	Summary Type: SUM
Summarized Object: rice_details	
Field to Aggregate: rice_details.rice_distributed	
Filter Criteria:	

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-upSummary 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.

SETUP > OBJECT MANAGER
rice mill

Fields & Relationships

Custom Field Definition Detail

Field Information		Object Name rice mill
Field Label	rice taken	
Field Name	rice_taken	
API Name	rice_taken_c	
Description		
Help Text		
Data Owner		
Field Usage		
Data Sensitivity Level		
Compliance Categorization		
Created By	Ponnuru Sravya Karthika 02/01/2025, 7:39 pm	Modified By Ponnuru Sravya Karthika 02/01/2025, 7:39 pm

Roll-Up Summary Options

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

Activity 5: Creating Fields in Objects

Creating the number fieldin the Rice Details object.

Navigate to Setup:

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

Edit Rice Details Object:

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

Create New Field:

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

Select Data Type:

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

Define Field Properties:

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

Proceed with Creation:

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a back arrow, forward arrow, a refresh icon, and a search bar labeled "Search Setup". Below the navigation is a header with a cloud icon, "Setup", "Home", and "Object Manager". The main content area has a title "SETUP > OBJECT MANAGER" and "rice details". A sub-header "rice details Custom Field" and "supplier" is displayed. On the left, a sidebar lists various setup categories like "Details", "Fields & Relationships" (which is selected), "Page Layouts", etc. The main panel shows the "Custom Field Definition Detail" for "supplier". It includes fields for "Field Label" (supplier), "Field Name" (supplier), "API Name" (supplier_c), "Description", "Help Text", "Data Owner", "Field Usage", "Data Sensitivity Level", "Compliance Categorization", "Created By" (Ponnuru Sravya Karthika, 02/01/2025, 7:23 pm), "Modified By" (Ponnuru Sravya Karthika, 02/01/2025, 7:46 pm), "Master-Detail Options" (Related To: supplier, Related List Label: rice details, Sharing Setting: Read/Write, Reparentable Master Detail: unchecked), and a "Lookup Filter" section.

Activity 6: Creating Fields in Rice Mill Objects

Navigate to Setup:

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

Edit Rice Mills Object:

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

Create New Field:

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

Select Data Type:

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

The screenshot shows the Salesforce Object Manager interface. On the left, there's a sidebar with various setup options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main area displays a custom field for the 'rice mill' object. The field is named 'rice price/kg' with a field label of 'rice price/kg'. It has a data type of 'Number' and is required. The field is used in the 'rice mill' object.

Activity 7: Creating Fields in Consumer Objects

Navigate to Setup:

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

Edit Consumer Object:

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

Create New Field For First Name:

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and various global buttons. The main title is 'SETUP > OBJECT MANAGER consumer'. On the left, a sidebar lists 'Fields & Relationships' under 'consumer Custom Field' and provides links to 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Search Layouts', 'List View Button Layout', 'Restriction Rules', and 'Scoping Rules'. The right panel displays the 'Custom Field Definition Detail' for the 'First name' field. Key details shown include:

Field Label	First name	Object Name	consumer
Field Name	First_name	Data Type	Text
API Name	First_name_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Ponnuru Sravya Karthika, 02/01/2025, 7:49 pm	Modified By	Ponnuru Sravya Karthika, 02/01/2025, 7:49 pm

The 'General Options' section includes checkboxes for Required, Unique, Case Sensitive, External ID, and Default Value, all of which are currently unchecked.

Create New Field For Last Name:

The screenshot shows the Salesforce Object Manager interface, similar to the previous one but for the 'Last name' field. The main title is 'SETUP > OBJECT MANAGER consumer'. The right panel displays the 'Custom Field Definition Detail' for the 'Last name' field. Key details shown include:

Field Label	Last name	Object Name	consumer
Field Name	Last_name	Data Type	Text
API Name	Last_name_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Ponnuru Sravya Karthika, 02/01/2025, 7:50 pm	Modified By	Ponnuru Sravya Karthika, 02/01/2025, 7:50 pm

The 'General Options' section includes checkboxes for Required, Unique, Case Sensitive, External ID, and Default Value, all of which are currently unchecked.

Create New Field For Email :

The screenshot shows the Salesforce Object Manager interface for the 'consumer' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main content area displays the 'email' custom field definition. The 'Field Information' section shows the field label 'email', field name 'email', API name 'email_c', and data type 'Email'. The 'General Options' section includes checkboxes for Required, Unique, External ID, and Default Value. A note at the bottom indicates 'Validation Rules 0'.

Create New Field For Rice Taken By Shops:

The screenshot shows the Salesforce Object Manager interface for the 'consumer' object. The left sidebar lists various setup options. The main content area shows the creation of a new custom field named 'Rice taken by shops'. The 'Field Information' section shows the field label 'Rice taken by shops', field name 'Rice_taken_by_shops', API name 'Rice_taken_by_shops_c', and data type 'Number'. The 'General Options' section includes checkboxes for Required, Unique, External ID, and AI Prediction. A note at the bottom indicates 'Validation Rules 0'.

Create New Field For Rice Type:

The screenshot shows the Salesforce Setup interface under the Object Manager for the 'consumer' object. A new custom field named 'Rice type' has been created. The field information includes:

Field Label	Rice type	Object Name	consumer
Field Name	Rice_type	Data Type	Picklist
API Name	Rice_type_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Ponnuru Sravya Karthika, 02/01/2025, 7:53 pm	Modified By	Ponnuru Sravya Karthika, 02/01/2025, 7:53 pm

General Options include 'Required' (unchecked) and 'Default Value' (set to null). Picklist Options include 'Restrict picklist to the values defined in the value set' (checked) and 'Controlled Field' (set to null).

Create New Field For Phone Number:

The screenshot shows the Salesforce Setup interface under the Object Manager for the 'consumer' object. A new custom field named 'Phone number' has been created. The field information includes:

Field Label	Phone number	Object Name	consumer
Field Name	Phone_number	Data Type	Phone
API Name	Phone_number_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Ponnuru Sravya Karthika, 02/01/2025, 7:50 pm	Modified By	Ponnuru Sravya Karthika, 02/01/2025, 7:50 pm

General Options include 'Required' (unchecked) and 'Default Value' (set to null). Validation Rules section indicates 'No validation rules defined'.

Create New Field For Mode Of Payment:

The screenshot shows the Salesforce setup interface for creating a new custom field. The object selected is 'consumer'. The 'Fields & Relationships' tab is active. A new field named 'Mode of payment' is being defined. The 'Field Label' is 'Mode of payment' and the 'Field Name' is 'Mode_of_payment'. The 'Data Type' is set to 'Picklist'. Other details like 'Description', 'Help Text', 'Data Owner', and 'Field Usage' are also visible. The 'General Options' section shows 'Required' is unchecked and 'Default Value' is set to 'None'. Under 'Picklist Options', it says 'Restrict picklist to the values defined in the value set' is checked. The 'Formula Options' section is collapsed.

Activity 8: Creating Cross Object Formula Field in Consumer Object

A cross-object formula field is a formulafield that references fields from anotherobject 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 searchbar Click on Fields & Relationships → click on New.
- Select Data type as "Formula" and click Next.
- Give Field Label and Field Name as "Amount Paid" and select formula return type as "Number" Formula: rice_taken_by_shops_c * rice_mill_name_r.rice_price_kg_c

The screenshot shows the creation of a new formula field 'Amount Paid' for the 'consumer' object. The 'Field Label' is 'Amount Paid' and the 'Field Name' is 'Amount_Paid'. The 'Data Type' is set to 'Formula'. The formula entered is 'rice_taken_by_shops_c * rice_mill_name_r.rice_price_kg_c'. The 'Decimal Places' is set to 2. The 'Formula Options' section includes 'Evaluate When' dropdown set to 'Always' and 'Evaluate In' dropdown set to 'Record'. The 'Formula Options' section is expanded to show these settings.

- Give Field Label and Field Name as “AmountPaid” and select formula return type as “Number” and Next.
- Go to setup → click on Object Manager → type object name (consumer) in the searchbar
- Click on Fields & Relationships → click on New.
- Select Data type as “Formula”, click Next.
- Give FieldLabel and Field Name as “Consumer Name” and select formula return type as “TEXT”, click Next.

Insert fieldformula should be: First_Name_c + '' +Last_Name_c , Check For syntax.

The screenshot shows the Salesforce Setup interface for creating a custom field. The URL is lbrc6com2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01l0M000003hZbt/FieldsAndRelationships/00NdM00000BAvzz/view. The page title is "SETUP > OBJECT MANAGER consumer". The left sidebar shows various tabs like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main content area shows a "Custom Field Definition Detail" for a "consumer Custom Field Consumer Name". The "Field Information" section includes fields for Field Label (Consumer Name), Field Name (Consumer_Name__c), API Name (Consumer_Name__c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The "Formula Options" section shows the formula "First_name__c + '' + Last_name__c" and the Data Type as "Formula". The "Object Name" is listed as "consumer".

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 ValidationRule 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 PhoneNumber”.
- Save Validation rule .

The screenshot shows the Salesforce Setup interface for the 'consumer' object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the 'Validation Rule Detail' for the 'consumer' object. 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'. The rule is active and located at the top of the page. The 'Created By' and 'Modified By' fields show the details of the user who created and last modified the rule.

Overall SupplierFields

The screenshot shows the Salesforce Setup interface for the 'supplier' object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the 'Fields & Relationships' section for the 'supplier' object. It shows a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table contains four rows: 'Created By' (CreatedByld, Lookup(User)), 'Last Modified By' (LastModifiedByld, Lookup(User)), 'Owner' (OwnerId, Lookup(User,Group)), and two roll-up summary fields: 'sum of rice distributed' (sum_of_rice_distributed_c, Roll-Up Summary (SUM rice details)) and 'supplier Name' (Name, Text(80)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedByld	Lookup(User)		
Last Modified By	LastModifiedByld	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
sum of rice distributed	sum_of_rice_distributed_c	Roll-Up Summary (SUM rice details)		
supplier Name	Name	Text(80)		

Overall Rice Mills Fields

The screenshot shows the Salesforce Object Manager interface for the 'rice mill' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main content area displays a table titled 'Fields & Relationships' with 7 items. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
rice distributed to shops	rice_distributed_to_shops_c	Roll-Up Summary (SUM rice details)		▼
rice mill Name	Name	Auto Number		✓
rice price/kg	rice_price_kg_c	Number(5, 0)		▼
rice taken	rice_taken_c	Roll-Up Summary (SUM consumer)		▼

Overall Rice Details Field

The screenshot shows the Salesforce Object Manager interface for the 'rice details' object. The left sidebar lists various setup options. The main content area displays a table titled 'Fields & Relationships' with 6 items. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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	supplier_c	Master-Detail(supplier)		✓

Overall ConsumerFields

The screenshot shows the Salesforce Object Manager interface for the 'consumer' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area is titled 'Fields & Relationships' and displays 14 items, sorted by Field Label. The table columns include FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid__c	Formula (Number)		
Consumer Name	Consumer_Name__c	Formula (Text)		
consumer Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
email	email__c	Email		
First name	First_name__c	Text(30)		
Last Modified By	LastModifiedById	Lookup(User)		
Last name	Last_name__c	Text(50)		
Mode of payment	Mode_of_payment__c	Picklist		

This screenshot shows the same Salesforce Object Manager interface for the 'consumer' object, but with a different set of fields selected. The table now includes:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
email	email__c	Email		
First name	First_name__c	Text(30)		
Last Modified By	LastModifiedById	Lookup(User)		
Last name	Last_name__c	Text(50)		
Mode of payment	Mode_of_payment__c	Picklist		
Phone number	Phone_number__c	Phone		
rice mill name	rice_mill_name__c	Master-Detail(rice mill)		✓
Rice taken by shops	Rice_taken_by_shops__c	Number(5, 0)		
rice taken by shops in kgs	rice_taken_by_shops_in_kgs__c	Number(18, 0)		
Rice type	Rice_type__c	Picklist		

Milestone 6: Page Layouts

Page Layout in Salesforce allows us to customize the design and organize detail and edit pages of records in Salesforce. Page layouts can be used to control the

appearance of fields,related lists, and custom links on standard and custom objects' detail and edit pages.

Activity 1: Creating the Page Layout

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

The screenshot shows the Salesforce setup interface for creating a page layout for the 'consumer' object. The left sidebar has tabs for 'Setup', 'Home', and 'Object Manager'. Under 'Object Manager', 'consumer' is selected. The main content area shows the 'Page Layouts' tab is active. On the right, there's a 'Layout Properties' toolbar with buttons for 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. Below this is a 'Fields' section with a 'Section' field highlighted. The main area displays three sections: 'rice details' (with fields like 'Rice taken by shop', 'Rice type'), 'Personal details' (with fields like 'First name', 'Last name', 'Phone number'), and 'Receipt details' (with fields like 'Mode of payment', 'Amount Paid'). Each section has its own table structure with columns for field name, label, and value.

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, recordtypes, 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 CustomObject 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 URL lrc6com2-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edM000009EkH7. The left sidebar shows 'Users' and 'Profiles'. The main content area is titled 'Profiles' and contains sections for 'Location Group Assignments', 'Work Type Groups', 'Custom Object Permissions' (with tables for AppLogs, consumers, Providers, Resources, rice details, rice mills, and supplier), 'Platform Event Permissions' (for AppLogEvents), and 'Session Settings'.

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 CustomObject Permissions and give accesspermissions for consumer, rice details, rice mill, and suppliers objects as mentioned in the below diagram. Click Save.

This screenshot is similar to the first one but focuses on the 'rice mill' object's permissions. In the 'Custom Object Permissions' section, the 'rice mill' row has checked boxes in the 'Read', 'Create', 'Edit', and 'Delete' columns under the 'Basic Access' header, and also in the 'View All' and 'Modify All' columns under the 'Data Administration' header. Other objects like AppLogs, consumers, Providers, Resources, rice details, and supplier have their respective permission rows.

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 CustomObject Permissions and give accesspermissions 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 left sidebar is collapsed, and the main area is titled 'Profiles'. The 'Custom Object Permissions' section is highlighted. It contains three tables: 'Communication Subscriptions', 'Custom Object Permissions', and 'Platform Event Permissions'. The 'Custom Object Permissions' table includes columns for 'Basic Access' and 'Data Administration' with checkboxes for Read, Create, Edit, Delete, View All, and Modify All. The 'Custom Object Permissions' table lists objects like AppLogs, consumers, Providers, Resources, rice details, rice mills, and supplier, with checkboxes indicating specific permission levels. The 'Platform Event Permissions' table shows 'Basic Access' for Read and Create for the AppLogEvents object.

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 interface for managing roles. The main window is titled "Creating the Role Hierarchy". It displays a hierarchical tree of roles. At the top level, there is a "Student" role. Below it is a "CEO" role, which has children "CFO", "COO", and "owner". The "owner" role has a child "employer", which in turn has a child "worker". There are also other roles listed under "SVP, Customer Service & Support". Each role node has three actions: "Edit", "Del", and "Assign". The left sidebar contains a navigation menu with sections like "Sales", "Service", and "Contact Roles". A search bar is at the top of the page.

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

- i. Go to Setup → type "Users" in the quick find box → select Users → click New User.
- ii. Fill in the fields:
 1. First Name: Vicky
 2. Last Name: Y
 3. Alias: Vy
 4. Email ID: sravyakarthikaponnuru@gmail.com
 5. Username: sravyakarthikaponnuru@gmail.com
 6. Nickname: User17359133043471117822
 7. Role: Owner
 8. User License: Salesforce
 9. Profile: Owner
 10. Save it.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The 'User Detail' section displays the following information for the user 'vicky y':

- Name:** vicky y
- Alias:** vy
- Email:** sravyakarthikaponnuru@gmail.com [Verify]
- Username:** sravyakarthikaponnuru@gmail.com
- Nickname:** User17359133043471117822
- Title:** Marketing User
- Company:** Offline User
- Department:** Knowledge User
- Division:** Flow User
- Address:** Service Cloud User
- Time Zone:** Site.com Contributor User (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale:** Site.com Publisher User English (India)
- Language:** WDC User English
- Delegated Approver:** Mobile Push Registrations View Manager
- Receive Approval Request Emails:** Data.com User Type Only if I am an approver
- Federation ID:** Accessibility Mode (Classic Only) Debug Mode High-Contrast Palette on Charts

Activity 2: Creating Another Users

- a. Go to Setup → type "Users" in the quick find box → selectUsers → click New User.
- b. Fill in the fields:
 1. Last Name: ram
 2. Alias: rram
 3. Email ID: sravyakarthikaponnuru1@gmail.com
 4. Username: sravyakarthikaponnuru1@gmail.com
 5. Nickname: User17359136981079192188
 6. Role: Employer
 7. User License: Salesforce Platform
 8. Profile: StandardPlatform User
 9. Save it.

The screenshot shows the Salesforce Setup interface for creating a new user. The URL in the browser is <https://develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005dM00000AyU8%3Fnoredirect%3D1%26isUserEntityOverride%3D1>. The page title is "Users". The left sidebar shows the "Users" section selected. The main content area displays the "User Detail" form for a user named "ram ram". The form includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Federation ID, Role, User License, Profile, Active status, and various checkboxes for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode, Debug Mode, and High-Contrast Palette on Charts.

- a. Go to Setup → type "Users" in the quick find box → selectUsers → click New User.
- b. Fill in the fields:
 - i. First Name: ragu
 - ii. Last Name: raj

- iii. Alias: rraj
- iv. Email ID: savyakarthikaponnuru@gmail.com
- v. Username: savyakarthikaponnuru2@gmail.com
- vi. Nickname: User17359138238564783031
- vii. Role: Worker
- viii. User License: Salesforce Platform
- ix. Profile: StandardPlatform User
- x. Save it.

User Detail

Name	ragu raj	Role	worker
Alias	rraj	User License	Salesforce Platform
Email	savyakarthikaponnuru@gmail.com [Verify]	Profile	Standard Platform User
Username	savyakarthikaponnuru2@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17359138238564783031	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Expert	Chatter	chatty_000dm000000jknuuah_ohb4gcuvyy@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Jane_Grey	jorev	jane_gray_fyinmrooam_z3s9qut0fsssv@lbrce6.com		<input checked="" type="checkbox"/>	Customer Community User
<input type="checkbox"/>	Karthika_Ponnuru_Savvy	PkArd	savyakarthikaponnuru2@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	rraj	rraj	savyakarthikaponnuru2@gmail.com	worker	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	ram_ram	ram	savyakarthikaponnuru2@gmail.com	employee	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	User_Integration	integ	integration@000dm000000jknuuah.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@000dm000000jknuuah.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>	y_vicky	YY	savyakarthikaponnuru2@gmail.com	owner	<input checked="" type="checkbox"/>	owner

Milestone 10: Permission Sets

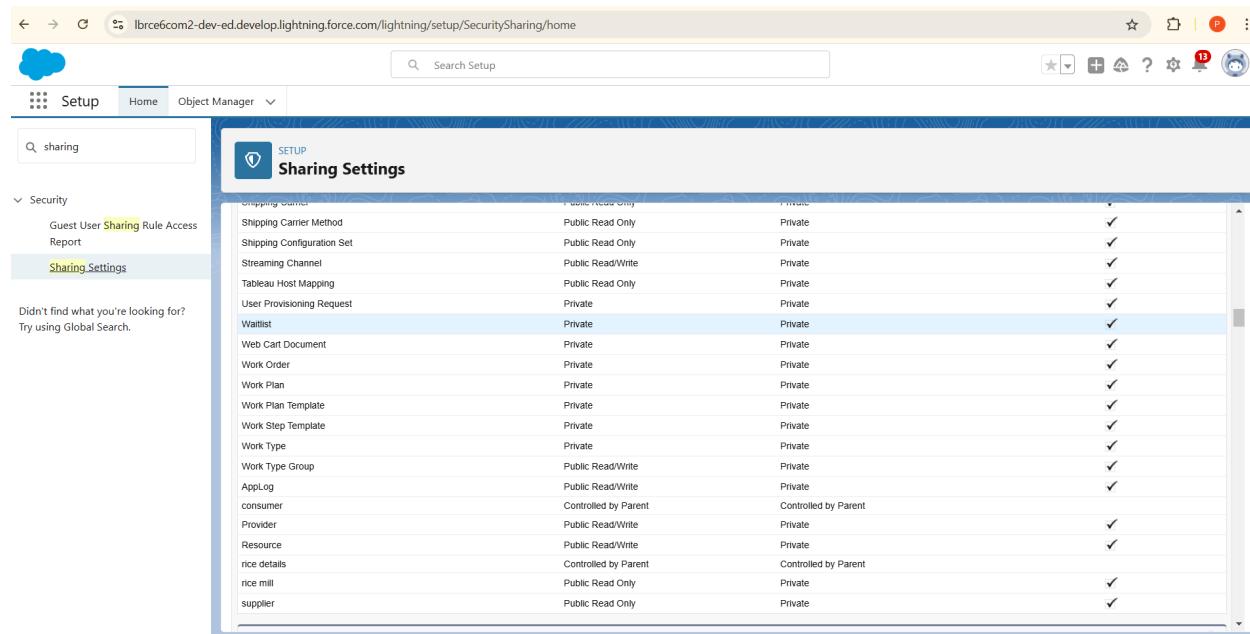
A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles and are the recommended way to manage your users' permissions.

Activity 1: Creating OWD Setting

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

ExtraInformation:

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



The screenshot shows the Salesforce Sharing Settings page. The URL is lbrce6com2-dev-ed.lightning.force.com/lightning/setup/SecuritySharing/home. The page title is "Sharing Settings". On the left, there's a sidebar with "Sharing" selected under "Security". The main area lists various objects with their sharing rules. A specific row for "Supplier" is highlighted, showing "Public Read Only" for "Sharing Rules" and "Private" for "Internal Access". Other objects listed include Shipping Carrier Method, Shipping Configuration Set, Streaming Channel, Tableau Host Mapping, User Provisioning Request, Waitlist, Web Cart Document, Work Order, Work Plan, Work Plan Template, Work Step Template, Work Type, Work Type Group, AppLog, consumer, Provider, Resource, rice details, rice mill, and supplier.

Sharing Rule	Sharing Rules	Internal Access
Shipping Carrier Method	Public Read Only	Private
Shipping Configuration Set	Public Read Only	Private
Streaming Channel	Public Read/Write	Private
Tableau Host Mapping	Public Read Only	Private
User Provisioning Request	Private	Private
Waitlist	Private	Private
Web Cart Document	Private	Private
Work Order	Private	Private
Work Plan	Private	Private
Work Plan Template	Private	Private
Work Step Template	Private	Private
Work Type	Private	Private
Work Type Group	Public Read/Write	Private
AppLog	Public Read/Write	Private
consumer	Controlled by Parent	Controlled by Parent
Provider	Public Read/Write	Private
Resource	Public Read/Write	Private
rice details	Controlled by Parent	Controlled by Parent
rice mill	Public Read Only	Private
supplier	Public Read Only	Private

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:
 - i. Consumer Name
 - ii. Rice Type
 - iii. Rice Price/kg
 - iv. Mode of Payment
 - v. Amount Paid
- Remove the unnecessary fields.
- Select the field that is mentioned below in the Group Rows section:
 - i. Rice Taken by Shops
- Click Save and Run .
- Save the report as “Range of Amount per Day”.
- Save it.

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 reports so that they can see all data remotely.

Activity 3: Create a Report Folder

Steps to Create a Report Folder:

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

Moving a Report to the New Folder:

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

The screenshot shows the Salesforce Lightning interface for the 'Reports' section. The top navigation bar includes links for 'supplier', 'rice mills', 'rice details', 'consumers', and 'Dashboards'. A dropdown menu for 'range of amount per day' is open. The main content area displays a table of reports with columns for Name, Created By, Created On, Last Modified By, and Last Modified Date. The report 'estimated rice per day' is selected and highlighted in blue. The sidebar on the left shows categories like 'Reports', 'All Folders' (which is currently selected), 'Folders', and 'Favorites'. Under 'All Folders', there are sections for 'Created by Me', 'Shared with Me', and 'Favorites'.

REPORTS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	Einstein Bot Reports	Automated Process	21/12/2024, 10:08 pm	Automated Process	21/12/2024, 10:08 pm
Created by Me	Einstein Bot Reports Summer '23	Automated Process	21/12/2024, 10:08 pm	Automated Process	21/12/2024, 10:08 pm
Private Reports	Einstein Bot Reports Summer '22	Automated Process	21/12/2024, 10:08 pm	Automated Process	21/12/2024, 10:08 pm
Public Reports	Einstein Bot Reports Winter '23	Automated Process	21/12/2024, 10:08 pm	Automated Process	21/12/2024, 10:08 pm
All Reports	estimated rice per day	Ponnuru Sravya Karthika	3/1/2025, 8:31 pm	Ponnuru Sravya Karthika	3/1/2025, 8:31 pm
	PRM Reports	Automated Process	21/12/2024, 10:08 pm	Automated Process	21/12/2024, 10:08 pm

Overall Reports (Range of amount per day)

The screenshot shows a Salesforce Lightning report interface. The title bar includes the URL 'lbrc6com2-dev-ed.lightning.force.com/lightning/r/Report/00OdM000009KACYUA4/view?queryScope=userFolders'. The top navigation bar has links for 'MY RICE', 'supplier', 'rice mills', 'rice details', 'consumers', 'Dashboards', and a search bar. A dropdown menu shows 'range of amount per day'. The main content area displays a report titled 'Report: rice mills with consumers range of amount per day'. It shows the following summary data:

Total Records	Total rice price/kg	Total Amount Paid
10	620	47,750.00

The report grid lists 10 rows of data, each representing a purchase from a consumer. The columns include:

Rice taken by shops	consumer: consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
30 (1)	consumers-004	basmati	10	Debit card	300.00
Subtotal			10		300.00
45 (1)	consumers-005	normal rice	45	UPI	2,025.00
Subtotal			45		2,025.00
50 (1)	consumers-001	basmati	20	Debit card	1,000.00
Subtotal			20		1,000.00
55 (1)	consumers-006	normal rice	55	Cash	3,025.00
Subtotal			55		3,025.00
65 (1)	consumers-007	normal rice	65	Debit card	4,225.00
Subtotal			65		4,225.00
70 (1)	consumers-003	normal rice	90	Net banking	6,300.00
Subtotal			90		6,300.00
75 (1)	consumers-008	basmati	75	UPI	5,625.00
Subtotal			75		5,625.00
85 (1)	consumers-009	normal rice	85	UPI	7,225.00

At the bottom, there are checkboxes for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total'.

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 UniqueName will be auto-populated.
- Click Save.

The screenshot shows the Salesforce Lightning interface for the 'MY RICE' app. The top navigation bar includes links for 'supplier', 'rice mills', 'rice details', 'consumers', 'Dashboards', and a search bar. A message 'range of amount per day' is displayed above the dashboard list. The main area displays a table of recent dashboards:

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	estimated data	total amount of data in dashboards	amount data dashboard	Ponnuru Sravya Karthika	3/1/2025, 8:35 pm	

On the left sidebar, there are sections for 'Dashboards', 'Recent' (1 item), 'DASHBOARDS' (Recent, Created by Me, Private Dashboards, All Dashboards), 'FOLDERS' (All Folders, Created by Me, Shared with Me), and 'FAVORITES' (All Favorites).

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.

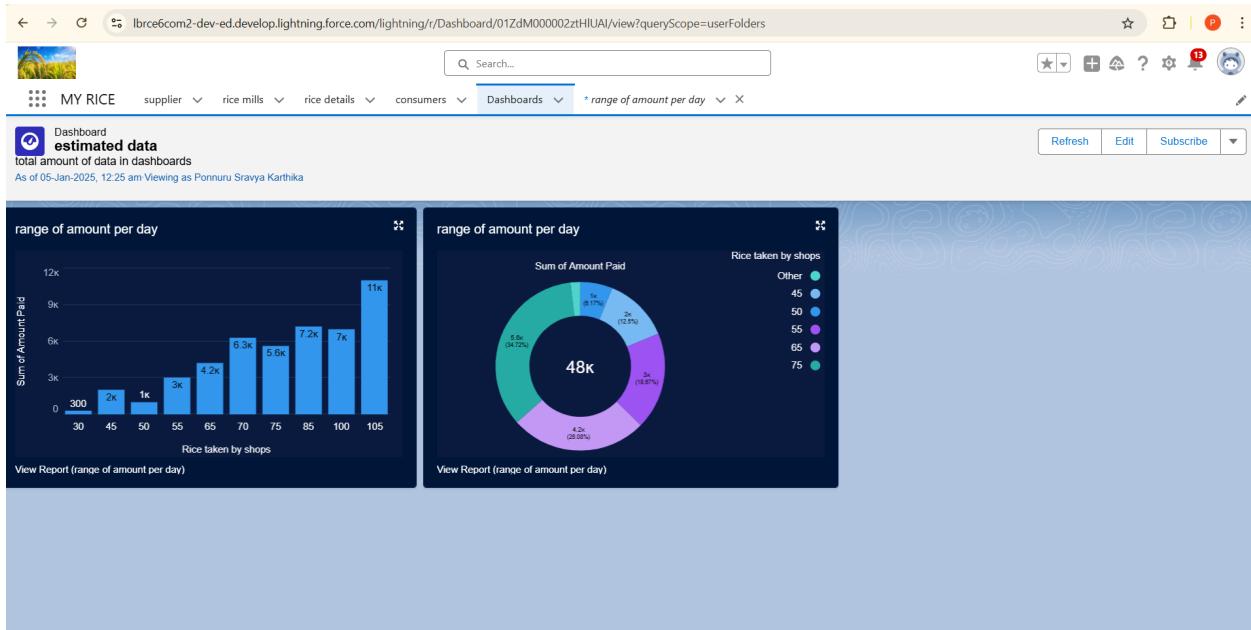
First ComponentDetails:

- 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 ComponentDetails:

- Select Add Component with the same steps as above.
- Display as: Donut Chart

- Sort by: Sum of Amount
- Title: Range of Amount per Day
- Component Theme: Dark



Milestone 13: APEX

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

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

Creating Classes :

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

- **Class:**

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

- **Object**

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

Creating an Apex Class(ConsumerRecord)

- Login to the Salesforce account and navigate to the gear account in the top right corner.
- Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.
- 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'+

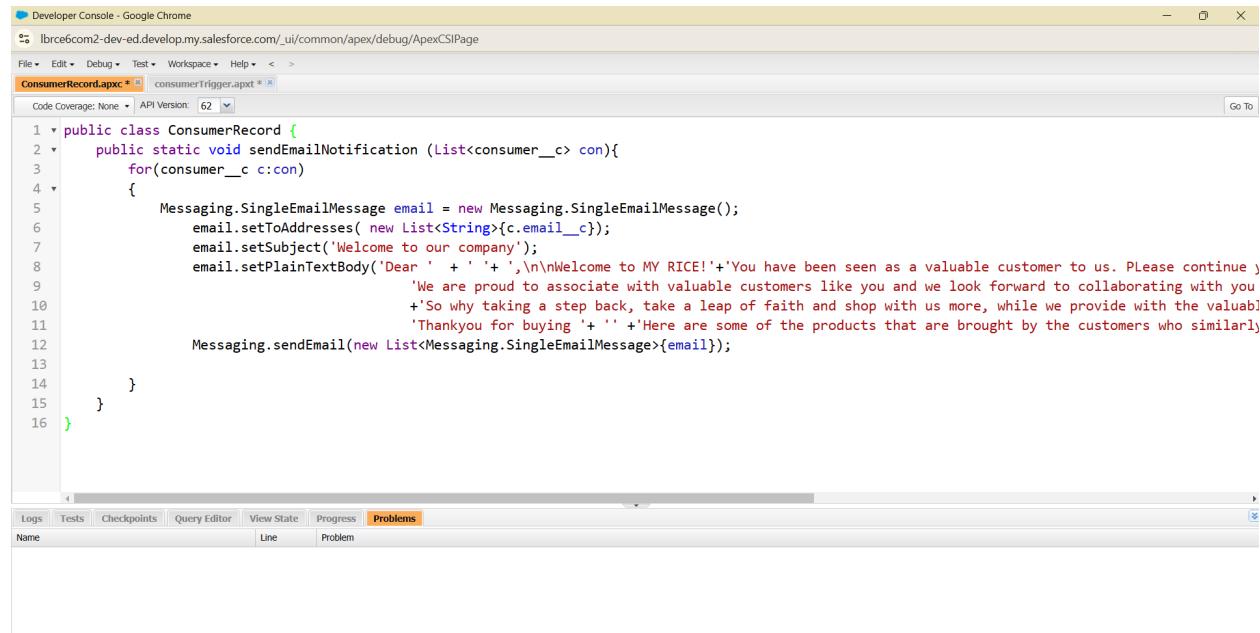
'Thankyou for buying '+' Here are some of the products that are brought by the customers who similarly bought products like this'+'\n\n');

```
Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
```

```
}
```

```
}
```

```
}
```



The screenshot shows the Salesforce Developer Console in Google Chrome. The URL is lbrce6com2-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The tab title is ConsumerRecord.apxc. The code editor contains the following Apex class:

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

The code includes several multi-line strings with embedded newlines and quotes. The developer console interface shows tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The Problems tab is selected.

Creating an Apex Trigger

How to create a new trigger :

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

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

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

Enter the trigger name and the object to be triggered.

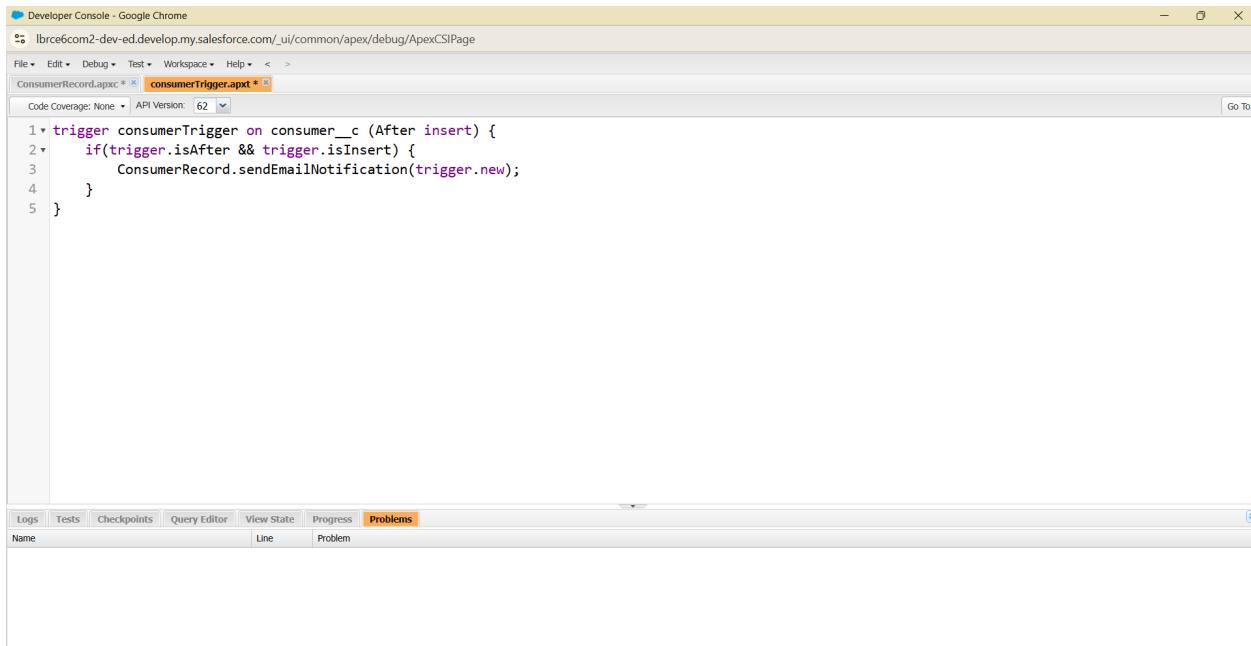
Syntax For creating trigger :

The syntax for creating trigger is :

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

Trigger code:

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



The screenshot shows the Salesforce Developer Console interface in Google Chrome. The title bar reads "Developer Console - Google Chrome". The address bar shows the URL "lbrececom2-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage". The navigation bar includes "File", "Edit", "Debug", "Test", "Workspace", "Help", and "ConsumerRecord.apxc * consumerTrigger.apxt *". The main area displays the trigger code:

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

Below the code editor, there are tabs for "Logs", "Tests", "Checkpoints", "Query Editor", "View State", "Progress", and "Problems". The "Problems" tab is selected, showing a table with columns "Name", "Line", and "Problem". The table is currently empty.