

## PROJECT TITLE : CRM APPLICATION FOR WHOLESALE RICE MILL

### 1. Project Overview :

The **Rice Mill CRM Application** is a comprehensive solution for managing and simplifying rice production and sales tracking. It enables daily reporting on rice quantity, type, and sales, which is then communicated to the owners. This CRM leverages customer relationship management to enhance customer engagement, streamline operations, and improve efficiency in the rice mill factory. The project aims to deliver a user-friendly application that meets the specific operational needs of a rice mill.

### 2. Objectives :

**Business Goals:** The Rice Mill CRM Application will automate daily production and revenue reporting, providing owners with clear insights into operational performance. It will also implement customer analytics to identify buying trends and popular rice varieties, enabling targeted marketing and better customer understanding. Additionally, the application will streamline resource allocation by forecasting demand and analysing sales patterns, helping the business optimize inventory and manage resources efficiently.

**Specific Outcomes:** The Rice Mill CRM Application will automate daily production and revenue reporting, track customer buying trends, and optimize resource allocation based on demand forecasts and sales patterns provide clear insights for operational efficiency.

### 3. Salesforce Key Features and Concepts Utilized :

#### 1.Reporting and Dashboards:

- **Daily Sales and Production Reports:** Generates detailed reports on how much rice List 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.

## **2.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.

## **3.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.

## **4.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."

## **5.Permission Sets:**

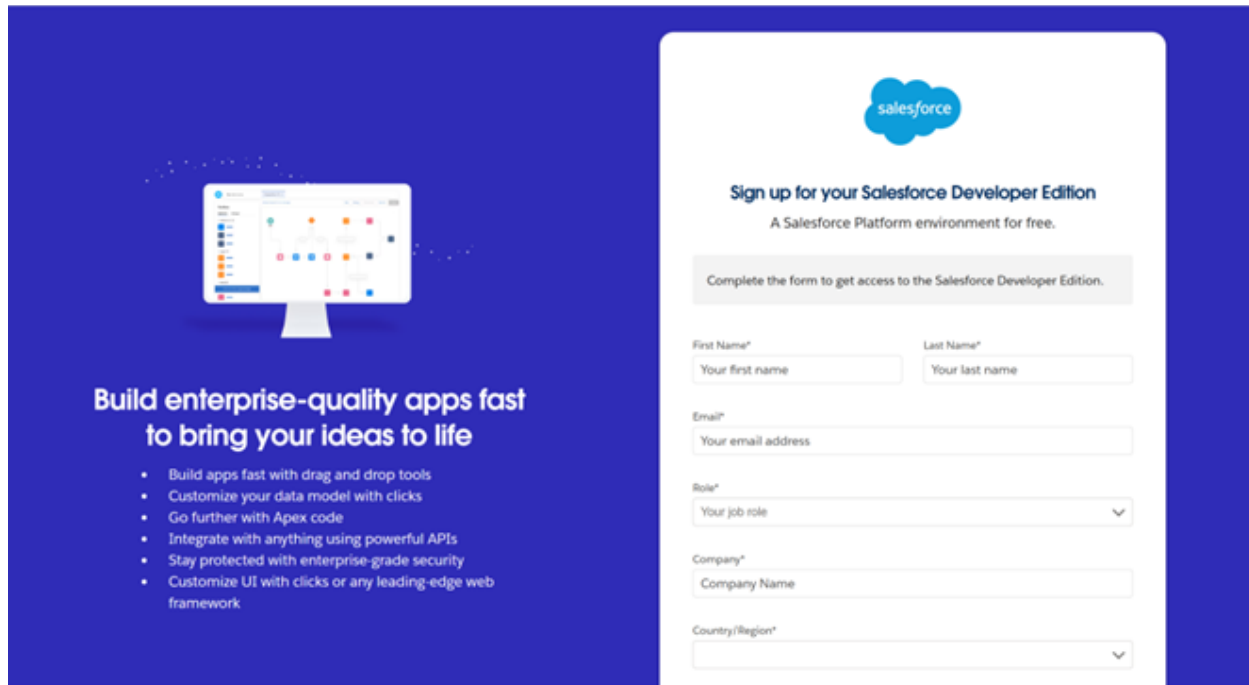
- **Wide Defaults (OWD):** Defines the baseline level of access for the most restricted user.

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

#### **4. Detailed Steps to Solution Design :**

##### **Activity 1: Creating Developer Account and Account activation.** **Steps:**

- On the sign up form, enter the following details
- Click on sign me up after filling these.
- First name & Last name
- Email
- Role : Developer
- Company : College Name
- Country : India
- Postal Code : pin code
- Username : should be a combination of your name and company
- This need not be an actual email id; you can give anything in the format.  
username@organization.com



The image shows the Salesforce Developer Edition sign-up page. On the left, there is a blue background with a white monitor icon displaying a Salesforce interface. Below the icon, the text reads: "Build enterprise-quality apps fast to bring your ideas to life". A bulleted list follows: "• Build apps fast with drag and drop tools", "• Customize your data model with clicks", "• Go further with Apex code", "• Integrate with anything using powerful APIs", "• Stay protected with enterprise-grade security", and "• Customize UI with clicks or any leading-edge web framework". On the right, there is a white sign-up form with the Salesforce logo at the top. The heading is "Sign up for your Salesforce Developer Edition" with the subtext "A Salesforce Platform environment for free." Below this, a grey box says "Complete the form to get access to the Salesforce Developer Edition." The form fields are: "First Name\*" (with placeholder "Your first name"), "Last Name\*" (with placeholder "Your last name"), "Email\*" (with placeholder "Your email address"), "Role\*" (a dropdown menu with "Your job role" selected), "Company\*" (with placeholder "Company Name"), and "Country/Region\*" (a dropdown menu).

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

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

Sign up for your Salesforce Developer Edition  
A Salesforce Platform environment for free.

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

First Name\*  
Your first name

Last Name\*  
Your last name

Email\*  
Your email address

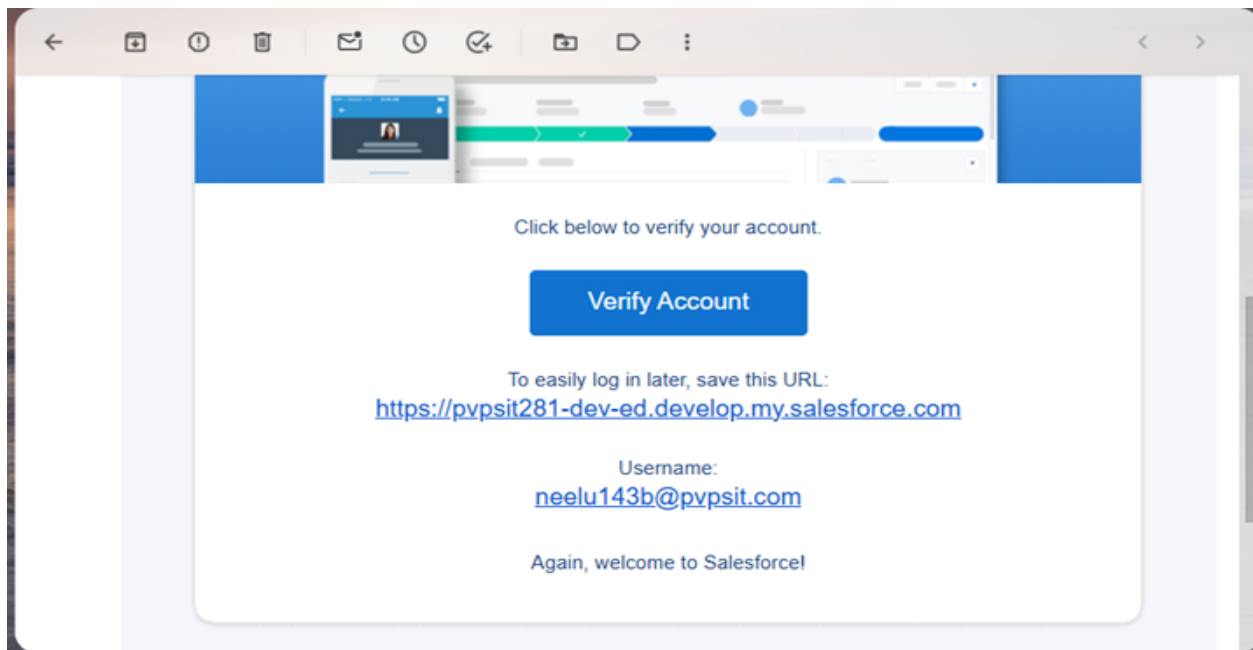
Role\*  
Your job role

Company\*  
Company Name

Country/Region\*

### ACTIVATION :

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



## Activity 2: Objects

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Salesforce objects are of two types:

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

### **Steps:**

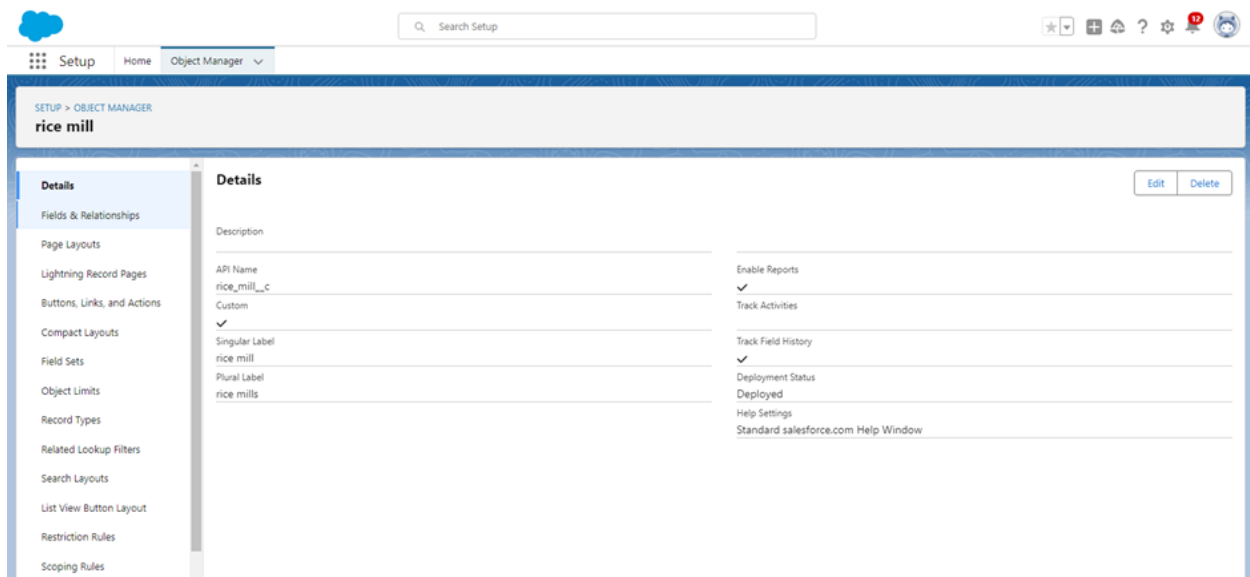
### **Create Supplier Object**

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

The screenshot shows the Salesforce Setup interface for creating a custom object. The top navigation bar includes the Setup icon, a search bar labeled 'Search Setup', and various utility icons. The main content area is titled 'SETUP > OBJECT MANAGER' and 'supplier'. A left 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, and Restriction Rules. The 'Details' section is active, showing a form with the following fields: Description, API Name (supplier\_\_c), Custom (checked), Singular Label (supplier), Plural Label (suppliers), Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). 'Edit' and 'Delete' buttons are located in the top right corner of the details section.

## Create Rice mill Object

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



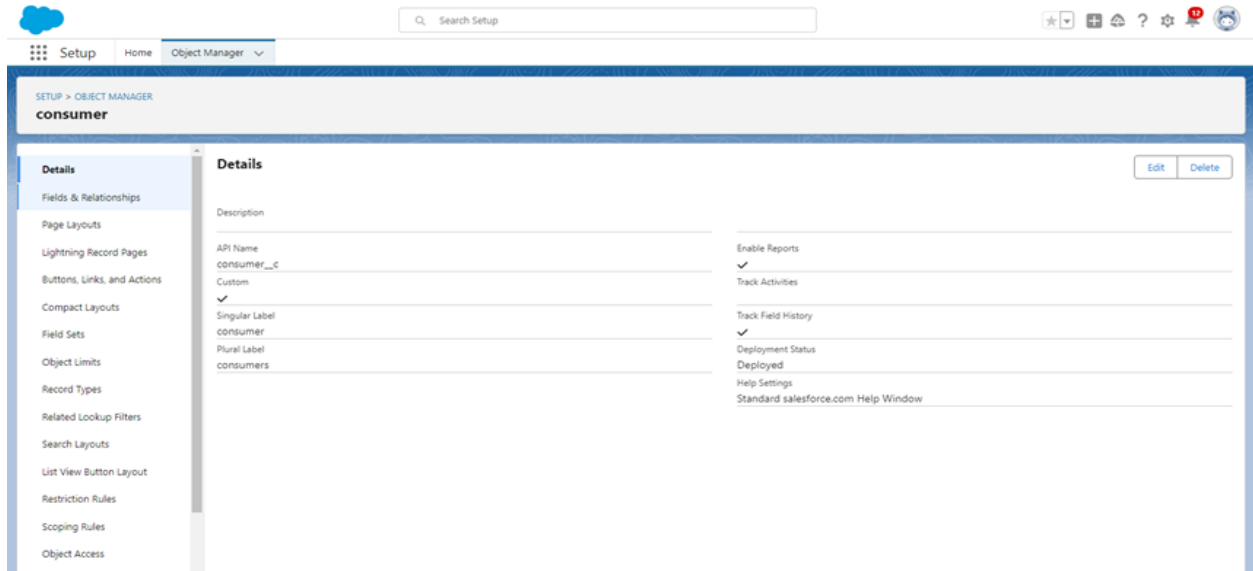
## Create consumer Objects

1. Use these display format for the consumer

2.label name >> consumer

3.Plural label name >> consumers

4.Display Format >> consumers-{000}5.Starting number >>



## Create rice details Objects

1.Use these display format for the rice details

2.label name >> rice details

3.Plural label name >> rice details

4.Display Format >> rice-{000}

5.Starting Number >>1

## Activity 3: Tabs

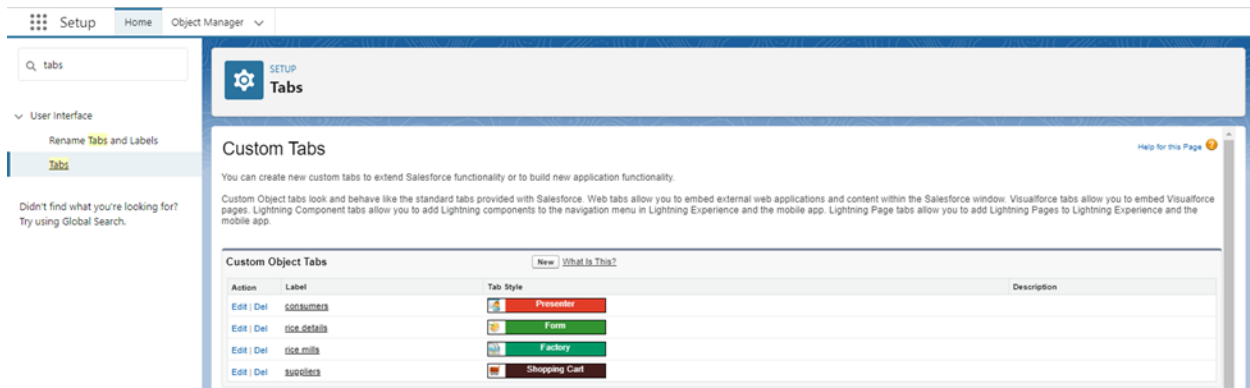
-

1. Creating a Custom Tab

2. To create a Tab:( supplier)

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

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



## **Activity 4: The Lightning App**

### **Create a Lightning App**

1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App
2. Fill the app name in app details as MY RICE >> Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.
3. Upload a photo that is related to your app.
4. To add Navigation Item:
5. Select the items (supplier, rice mill, consumer , Rice details ) from the search bar and move it using the arrow button >> Next.
6. To Add User Profiles:
7. Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.



## New Lightning App

### App Details & Branding

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

#### App Details

\* App Name ⓘ

Name your app...

\* Developer Name ⓘ

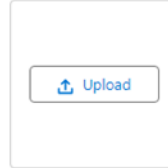
Enter a developer name...

Description ⓘ

Enter a description...

#### App Branding

Image ⓘ



Primary Color Hex

Value ⓘ

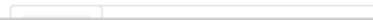


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Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

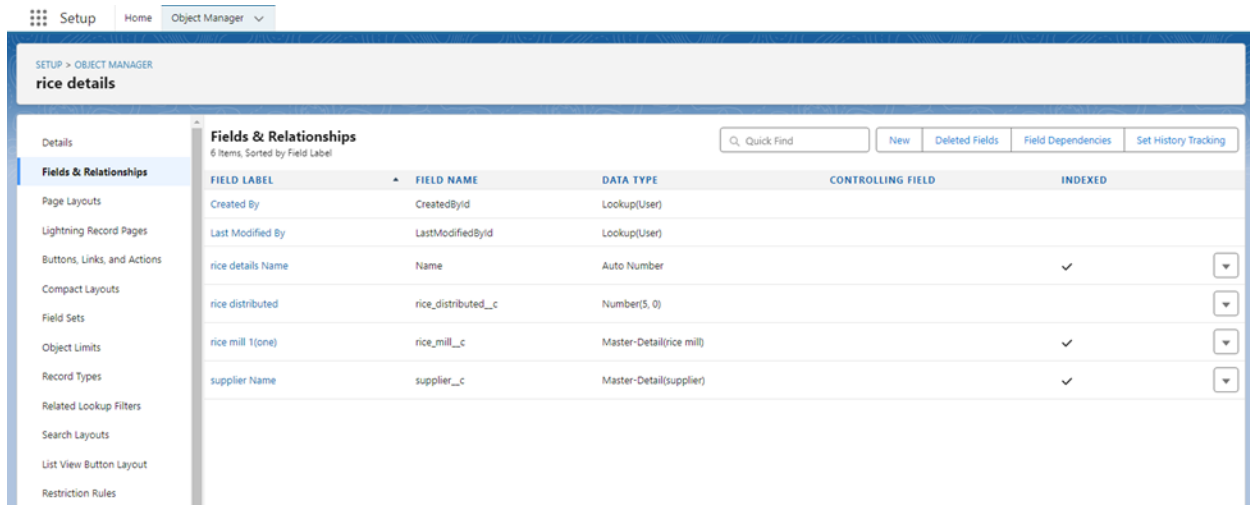
App Launcher Preview



### **Activity 5: Fields**

#### **Creating the number field in rice details object**

1. Go to the setup page >> click on object manager >> From drop down click edit for rice details object
2. Click on fields & relationship >> click on New.
3. Select Data type as “Number” and click Next.
4. Given the Field Label as “rice distributed ” and length as “ 5 ”.
5. Field Name will be auto populated, and click on Next- Next >> Save.



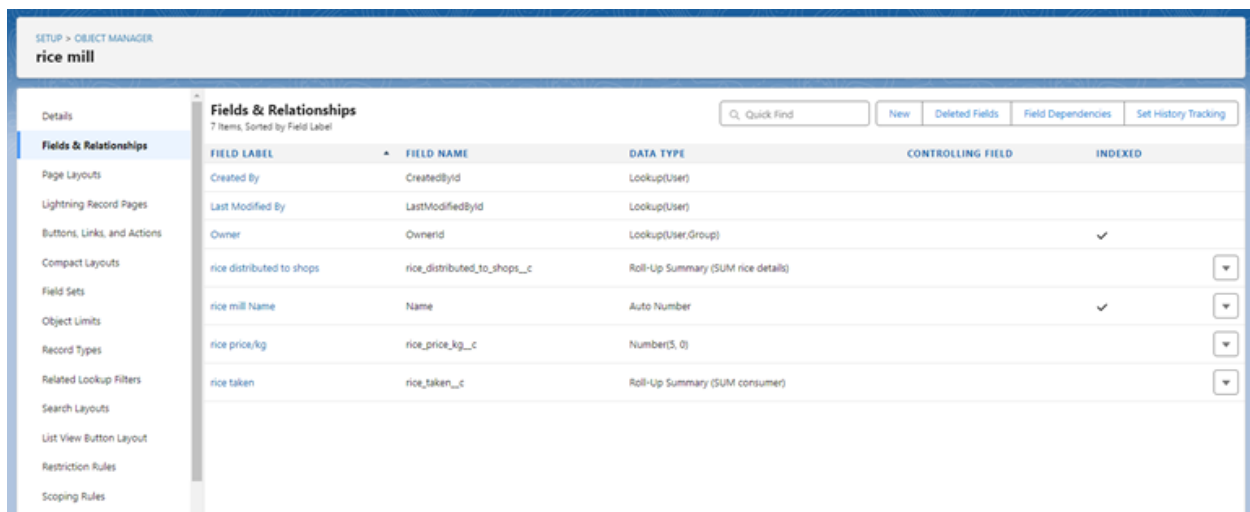
## Creating Junction Object

### Creating junction object as rice details with supplier & rice mill

1. Go to the setup page >> click on object manager >> From drop down click edit for rice details object
2. Click on fields & relationship - click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. Select the related object “supplier” and click next.
5. Give Field Label as “supplier Name” and click Next
6. Next >> Next >> Save & New.
7. Follow the same steps from 1 to 3.
8. Select the related object “rice mill” and click Next.
9. Give Field Label as “rice mill 1(one)” and click Next.
10. Next >> Next >> Save.

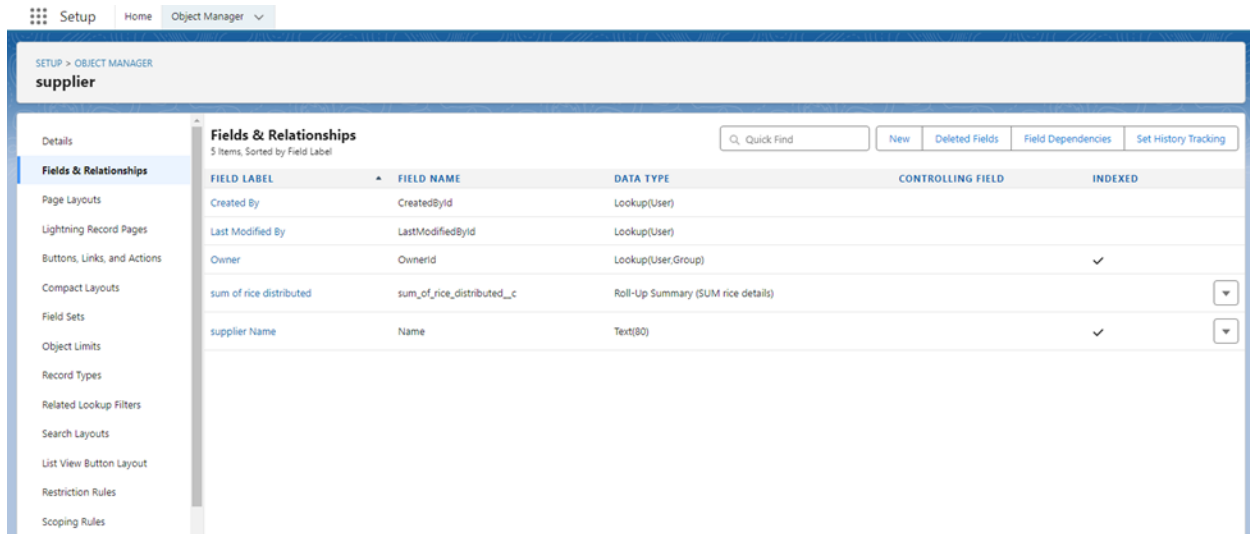
## Creating a Master-Detail Relationship

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



The screenshot shows the Salesforce Setup interface for the 'rice mill' object. The left sidebar contains a navigation menu with options like 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 'Fields & Relationships' section is active, displaying a table with 7 items sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The items listed are: Created By (CreatedById, Lookup(User)), Last Modified By (LastModifiedById, Lookup(User)), Owner (OwnerId, Lookup(User.Group), indexed), rice distributed to shops (rice\_distributed\_to\_shops\_\_c, Roll-Up Summary (SUM rice details)), rice mill Name (Name, Auto Number, indexed), rice price/kg (rice\_price\_kg\_\_c, Number(5, 0)), and rice taken (rice\_taken\_\_c, Roll-Up Summary (SUM consumer)).

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)		



### Creating the Roll-up Summary

1. Go to setup >> click on Object Manager >> type object name (supplier) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select the data type as “Rollup summary”, and click Next.
4. Give the Field label as “sum of rice distributed”, Field Name will be Auto generated, and click Next.
5. Select the summarised object as “rice details”.
6. Select the Rollup type as “sum”.
7. Select the field to aggregate as “rice distributed”, and click Next >> Next >> Save
8. Follow the same steps for the rice mill Object from 1 to 3
9. Give the Field label as “rice distributed to shops”, Field Name will be Auto generated, and click Next.
10. Select the summarised object as “rice details”.
11. Select the Rollup type as “sum”.
12. Select the field to aggregate as “rice distributed”, and click Next >> Next >> Save.

13.Note: create the field as “rice taken by shops in kegs” using number datatype in consumer object

14.Follow the same steps for the rice mill Object from 1 to 3

15.Give the Field label as “rice taken”, Field Name will be Auto generated, and click Next.

16.Select the summarised object as “consumer”.

17.Select the Rollup type as “sum”.

18.Select the field to aggregate as “rice taken in shops”, and click Next >> Next >> Save.

supplier  
New Custom Field

Step 1. Choose the field type

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

**Data Type**

☐ None Selected Select one of the data types below.

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

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

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

Edit supplier Custom Field  
sum of rice distributed

Custom Field Definition Edit Save Cancel

**Field Information**

Field Label

Field Name

Description

Help Text

Data Owner

Field Usage

Data Sensitivity Level

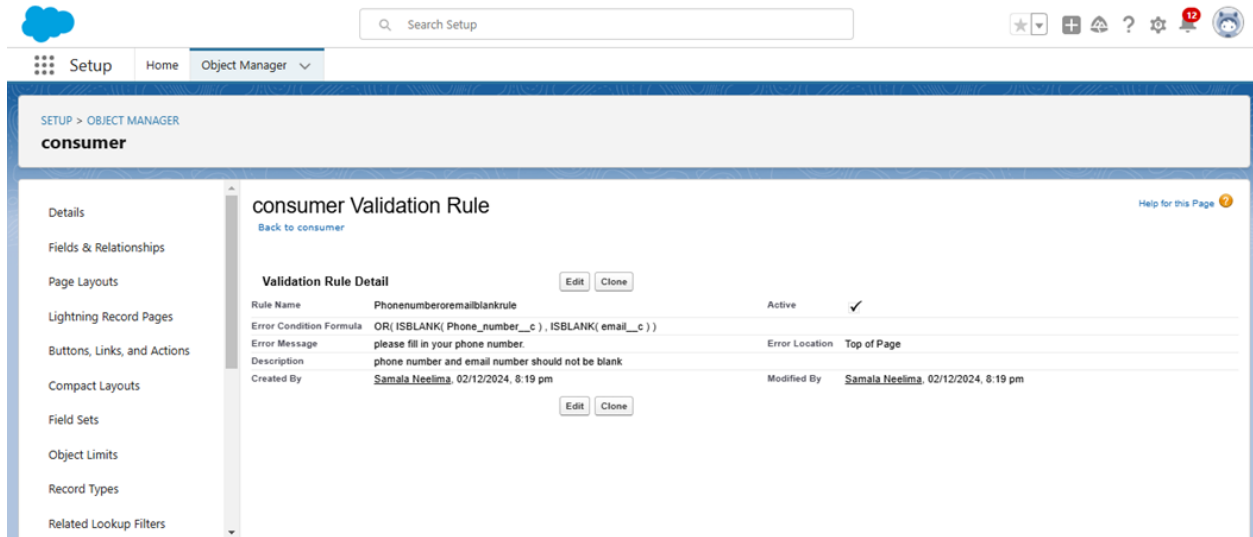
Compliance Categorization

Available	Chosen
PII	
HIPAA	
GDPR	
PCI	

Roll-Up Summary Options	
Data Type	Roll-Up Summary
Calculation Options	<input checked="" type="radio"/> Automatic calculation (Recommended) <input type="radio"/> Force a mass recalculation of this field
Select Object to Summarize	
Master Object	supplier
Summarized Object	rice details
Select Roll-Up Type	
<input type="radio"/> COUNT <input checked="" type="radio"/> SUM <input type="radio"/> MIN <input type="radio"/> MAX	Field to Aggregate: rice distributed ▼
Filter Criteria	
<input checked="" type="radio"/> All records should be included in the calculation <input type="radio"/> Only records meeting certain criteria should be included in the calculation	
<div>Save</div> <div>Cancel</div>	

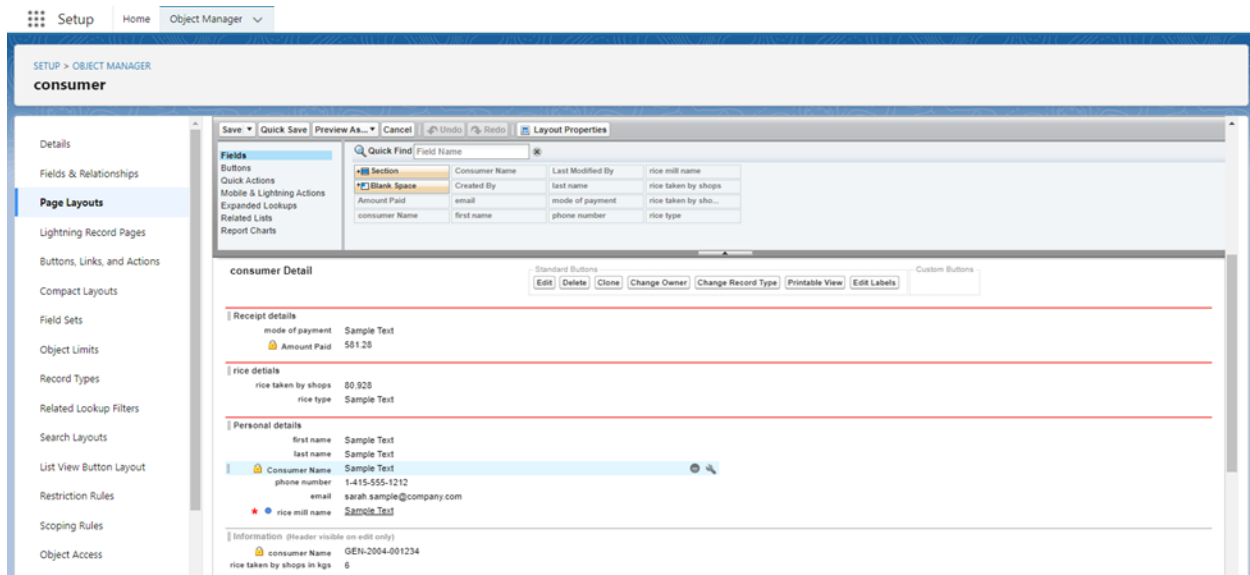
## Creating the validation rule

1. Go to the setup page >> click on object manager >> From drop down click edit for consumer object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “Phonenumberoremailblankrule”.
4. Enter the description as “phone number and email number should not be blank”.
5. Enter the formula as “OR( ISBLANK( phone\_number\_\_c ) , ISBLANK( email\_\_c ) )” and check the syntax.
6. Under the error message write as “please fill in your phone number.”
7. Select error location “top of page”.
8. Save the validation rule.



## **PAGE LAYOUTS**

1. Go to Setup >> Click on Object Manager >> Search for the object (consumer) >> From the drop down select the object and click on it.
2. Click on Page layout >> Click on New.
3. Select the existing page layout, and give the page layout name as “consumer layout”, and click save.
4. Drag and drop the section field to the consumer details and create the section.
5. Enter the section name as “Personal details”, - click Ok.
6. Now drag the fields to this section that mentioned, they are
7. First name, last name, consumer name , phone number, email, rice mill name.
8. Follow the same process for another two sections as shown above, they are
9. One section is “ rice details ” ; drag the fields that are
10. Rice taken by the shop, rice type.
11. Another section is “Receipt details ” , and drag the fields that are
12. Mode of payment, Amount paid.
13. Then, Click save.



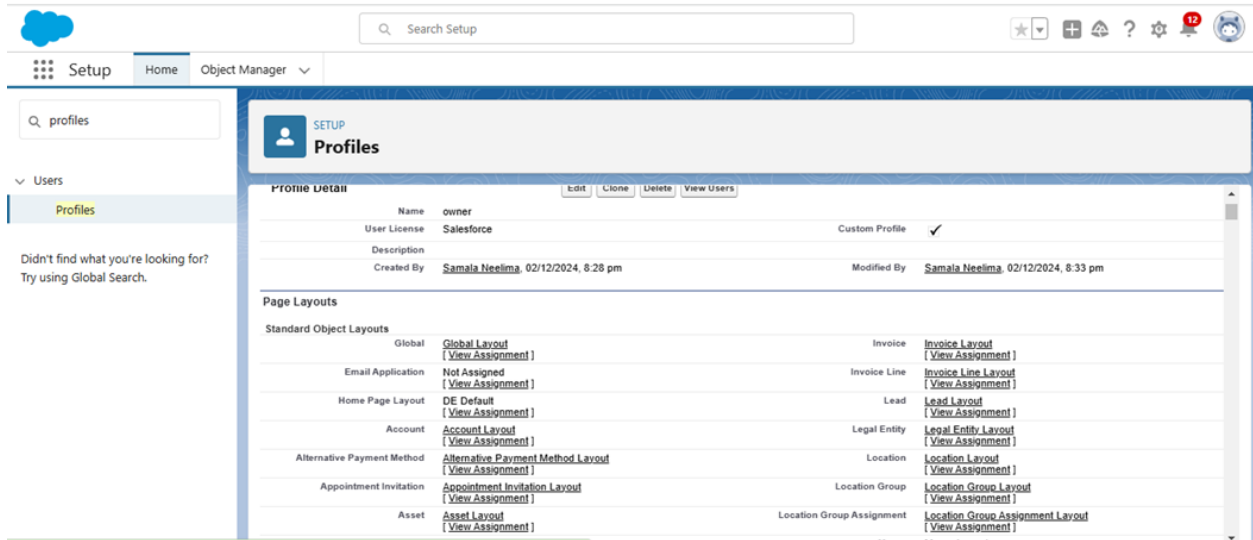
## **PROFILES**

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

### **Owner Profile:**

1. Go to setup >> type profiles in the quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (owner) >> Save.
2. 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.
3. Give access and save it.





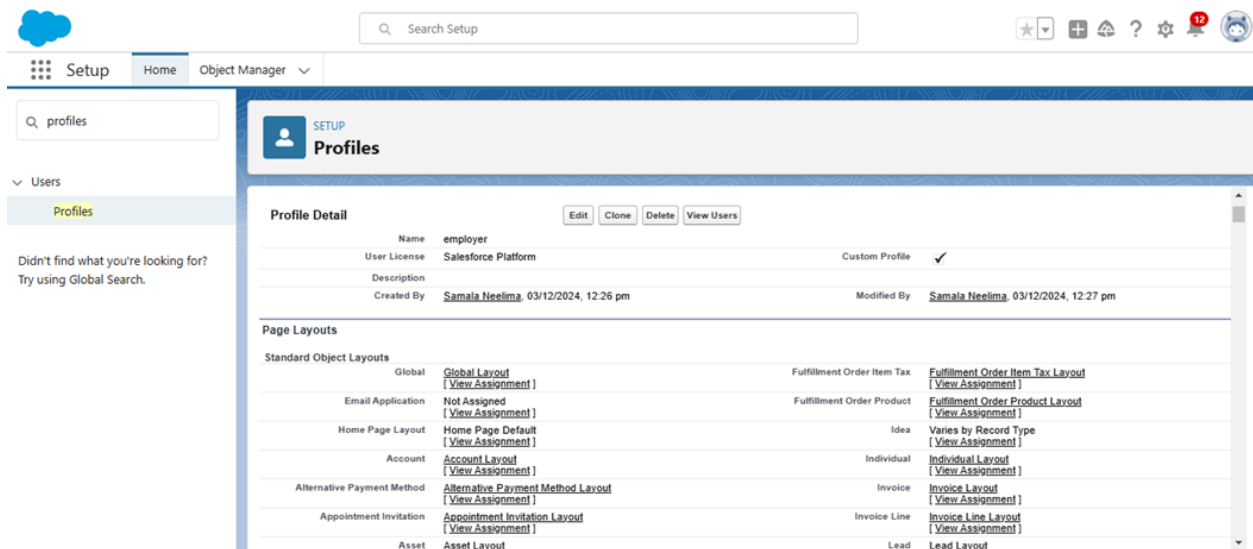
The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "profiles" entered. The main content area is titled "Profiles" and shows the "Profile Detail" for a profile named "Salesforce". The "Custom Profile" checkbox is checked. The "Page Layouts" section is expanded, showing a table of standard object layouts.

Standard Object Layouts	Global	Global Layout	Invoice	Invoice Layout
		[View Assignment]		[View Assignment]
Email Application	Not Assigned	[View Assignment]	Invoice Line	Invoice Line Layout
		[View Assignment]		[View Assignment]
Home Page Layout	DE Default	[View Assignment]	Lead	Lead Layout
		[View Assignment]		[View Assignment]
Account	Account Layout	[View Assignment]	Legal Entity	Legal Entity Layout
		[View Assignment]		[View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]	Location	Location Layout
		[View Assignment]		[View Assignment]
Appointment Invitation	Appointment Invitation Layout	[View Assignment]	Location Group	Location Group Layout
		[View Assignment]		[View Assignment]
Asset	Asset Layout	[View Assignment]	Location Group Assignment	Location Group Assignment Layout
		[View Assignment]		[View Assignment]

## Employer Profile

1. 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.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the rice mill.

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



The screenshot shows the Salesforce Setup interface for the "employer" profile. The "Custom Profile" checkbox is checked. The "Page Layouts" section is expanded, showing a table of standard object layouts.

Standard Object Layouts	Global	Global Layout	Fulfillment Order Item Tax	Fulfillment Order Item Tax Layout
		[View Assignment]		[View Assignment]
Email Application	Not Assigned	[View Assignment]	Fulfillment Order Product	Fulfillment Order Product Layout
		[View Assignment]		[View Assignment]
Home Page Layout	Home Page Default	[View Assignment]	Idea	Varies by Record Type
		[View Assignment]		[View Assignment]
Account	Account Layout	[View Assignment]	Individual	Individual Layout
		[View Assignment]		[View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]	Invoice	Invoice Layout
		[View Assignment]		[View Assignment]
Appointment Invitation	Appointment Invitation Layout	[View Assignment]	Invoice Line	Invoice Line Layout
		[View Assignment]		[View Assignment]
Asset	Asset Layout	[View Assignment]	Lead	Lead Layout
		[View Assignment]		[View Assignment]

## Worker Profile

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

The screenshot shows the Salesforce Setup interface for the 'worker' profile. The left sidebar contains a search bar with 'profiles' and a list of users. The main content area displays the profile details for 'worker', including its name, user license (Salesforce Platform), and creation/modification dates. Below this, the 'Page Layouts' section shows the 'Global Layout' for the 'Standard Object Layouts'. The 'Custom Object Permissions' section at the bottom contains two tables for permissions.

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
consumers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
rice details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
rice mills	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
suppliers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Role & Role Hierarchy

-

### Creating owner Role:

-

1. Go to quick find >> Search for Roles >> click on set up roles.
2. Go to quick find >> Search for Roles >> click on set up roles.
3. Click on Expand All and click on add role under whom this role works.
4. Give Label as "owner" and Role name gets auto populated. Then click on Save.

## Creating employer roles

1. Go to quick find >>Search for Roles >>click on set up roles.
2. Click plus on the CEO role, and click add role under owner.
3. Give Label as “employer” and Role name gets auto populated. Then click on Save.
4. Repeat the same steps for another role.
5. Click plus on the CEO role, and click plus on owner, and click add role under employer.
6. Give Label as “worker” and Role name gets auto populated. Then click on Save.

The screenshot displays the Salesforce Setup interface for the 'Roles' section. The left sidebar contains a navigation menu with 'Users', 'Roles' (highlighted), 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main content area is titled 'Creating the Role Hierarchy' and includes instructions on building the hierarchy. Below the instructions, a tree diagram shows the 'Your Organization's Role Hierarchy' starting with 'GVPCE' at the top. Under 'GVPCE' is the 'CEO' role, which has an 'Add Role' link. Below 'CEO' is the 'CFO' role, which also has an 'Add Role' link. Below 'CFO' is the 'COO' role, which has an 'Add Role' link. Below 'COO' is the 'owner' role, which has an 'Add Role' link. Below 'owner' is the 'employer' role, which has an 'Add Role' link. Below 'employer' is the 'worker' role, which has an 'Add Role' link. At the bottom of the hierarchy are three roles: 'SVP, Customer Service & Support', 'SVP, Human Resources', and 'SVP, Sales & Marketing', each with an 'Add Role' link. The 'Add Role' link is highlighted in yellow in the original image.

Setup Home Object Manager

roles

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

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

### Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

- GVPCE
  - [Add Role](#)
  - CEO [Edit](#) [Del](#) [Assign](#)
    - [Add Role](#)
    - CFO [Edit](#) [Del](#) [Assign](#)
      - [Add Role](#)
      - COO [Edit](#) [Del](#) [Assign](#)
        - [Add Role](#)
        - owner [Edit](#) [Del](#) [Assign](#)
          - [Add Role](#)
          - employer [Edit](#) [Del](#) [Assign](#)
            - [Add Role](#)
            - worker [Edit](#) [Del](#) [Assign](#)
              - [Add Role](#)
  - SVP, Customer Service & Support [Edit](#) [Del](#) [Assign](#)
    - [Add Role](#)
  - SVP, Human Resources [Edit](#) [Del](#) [Assign](#)
    - [Add Role](#)
  - SVP, Sales & Marketing [Edit](#) [Del](#) [Assign](#)
    - [Add Role](#)

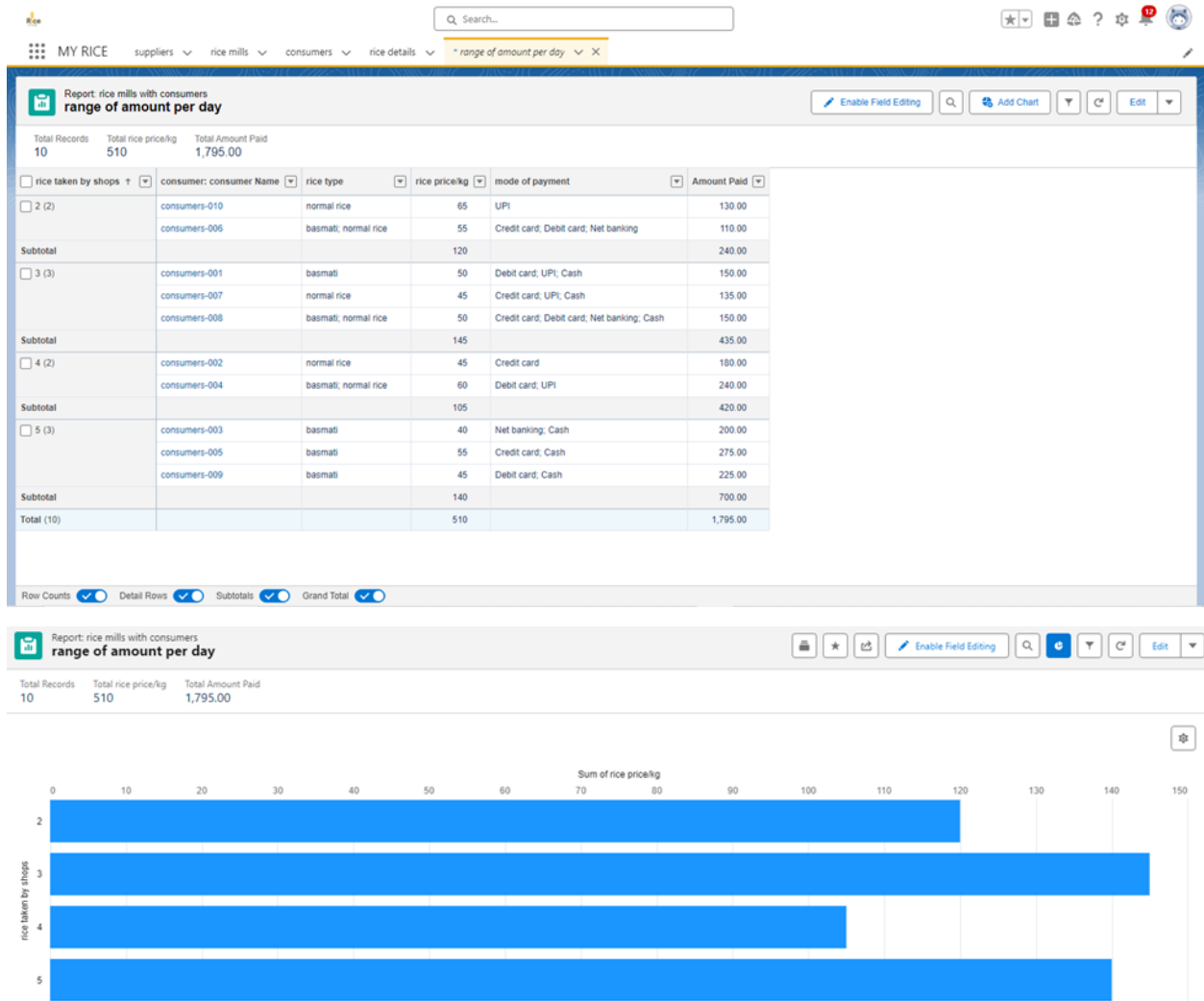
## **Report**

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### **Create Report:**

-

1. Go to the app >>click on the reports tab
2. Click New Report.
3. select for report type, search for “rice mill with consumers” and click on it. And click on start report.
4. Their outline pane is opened already; select the fields that are mentioned below in the column section.
5. 1.consumer name
6. 2.rice type
7. 3.rice price/kg
8. 4.mode of payments
9. 5.amount paid
- 10.Remove the unnecessary fields.
- 11.Select the fields that are mentioned below in the GROUP ROWS section.
- 12.Rice taken by shops
- 13.Click save and run and save the report as “range of amount per day”.and save it.



## 5. Testing and Validation:

### Creating an Apex Class(ConsumerRecord):

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

3. Then you can see many tools in the Toolbar of the new console window. Click on File, New, and Apex Class.
4. Enter the name of the class(ConsumerRecord) to create a new class file.

-  
-

### **Code Snippet :**

-

```
public 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});

        }
    }
}
```

### **Creating an Apex 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  
}
```

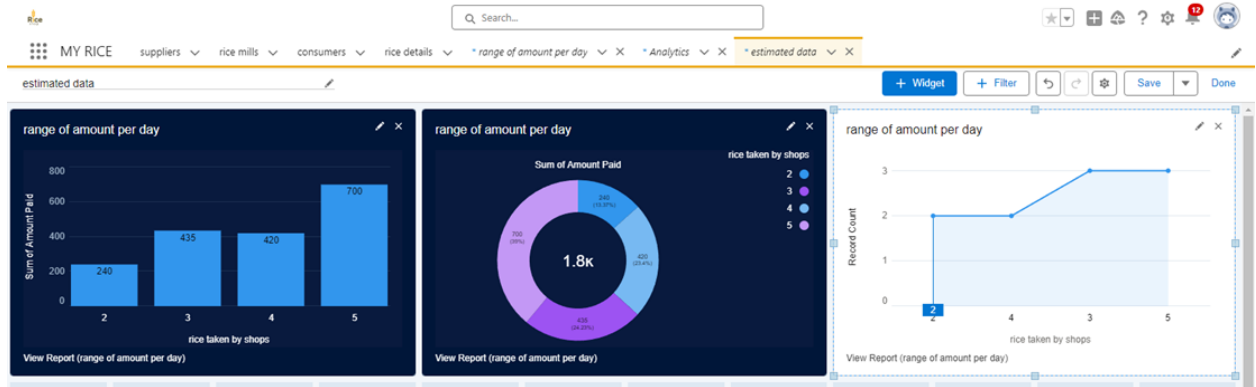
**Code Snippet :**

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

## **6.Key Scenarios Addressed by Salesforce in the Implementation Project.**

1. **Sales Process Automation:** Salesforce can automate sales workflows, reducing manual tasks.
2. **Customer Support:** Salesforce can provide tools to manage customer service cases and track resolutions.
3. **Data Analytics and Reporting:** Salesforce can generate detailed reports for business insights.

### **DASHBOARDS:**



**Resource Management:** Salesforce can help allocate resources efficiently based on business needs.

## 7. Conclusion:

In this project, Salesforce streamlined operational processes by enabling automated data calculations, real-time reporting, and secure access control. Custom widgets provided visual insights into rice sales, production, and revenue, enhancing decision-making. Validation rules ensured data accuracy, while role-based access protected sensitive information. Rollup summaries and formulas reduced manual effort in calculations. Overall, Salesforce optimised business operations, contributing to improved productivity and planning.