

A CRM APPLICATION FOR WHOLESALE

RICE MILL

By

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Project Abstract

The "CRM Application for Wholesale Rice Mill" is a specialized customer relationship management system designed to streamline and enhance the operational efficiency of rice mills. This application focuses on the unique needs of wholesale rice distributors, providing a platform to manage customer interactions, sales processes, and inventory control effectively. The system integrates features like customer data management, order tracking, billing, and real-time inventory updates, enabling wholesalers to respond promptly to market demands and customer inquiries. The application also includes analytical tools for forecasting sales trends, optimizing supply chains, and improving customer satisfaction. By automating routine tasks and providing actionable insights, the CRM application aims to boost productivity, reduce operational costs, and foster stronger relationships with customers.

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INTRODUCTION

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

Features and Functionality:

- **Reporting and Dashboards:** The application can generate detailed reports and analytics regarding daily how much rice sold and total income per daily, revenue generated, popular amenities, and most bought customers. Easy to understand the data to the owner, improving resource allocation, and planning future development.
- **A rollup summary field:** This is a field that summarizes data from a child object to a parent object that shares a master-detail relationship. Rollup summary fields can use the COUNT, SUM, MIN, and MAX functions. For example, you could use a rollup summary field to display the total value (amount of rice supplied) from rice details on a related supplier.
- **A cross-object formula field:** It is a formula field that references fields from another object in Salesforce. This type of formula allows users to calculate the total amount from number of rice taken * price/kg and it displays the total amount I have to pay.
- **Validation rules:** validation rules also include an error message to display to the user when the rule returns a value of “True” due to an invalid value. so , In this project i gave Isblank formula. Isblank formula is used to verify whether it is blank it shows error.
- **Permission sets:** Organization Wide Defaults(OWD) in salesforce is the baseline level of access that the most restricted user should have. Organizational Wide Defaults are used to restrict access. But in our case we created roles and given the roles in such a way that the owner can see employer and worker records , and the employer can see the worker records.

Task 1: Creating Account

1. Creating a developer org in salesforce.

The screenshot shows the "Sign up for your Salesforce Developer Edition" page. The background features a blue banner with the text "Build enterprise-quality apps fast to bring your ideas to life" and a list of benefits. The main form includes fields for First Name*, Last Name*, Email*, Role*, Company*, Country/Region*, and Postal Code*. A "Complete the form to get access to the Salesforce Developer Edition" button is at the bottom of the form.

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*

Postal Code*

2. Activate your account by clicking on the verify account that is sent to your mail.

The screenshot shows an email inbox with a message from developer@salesforce.com. The subject is "Welcome to Salesforce: Verify your account". The email body contains a "Thanks for signing up with Salesforce!" message, a "Verify Account" button, and a URL: <https://stoom-dev-ed-developer.my.salesforce.com>.

Welcome to Salesforce: Verify your account

developer@salesforce.com <developer@salesforce.com>
to me

10:30 (1 minute ago)

Thanks for signing up with Salesforce!

Click here to verify your account.

Verify Account

To easily log in later, save this URL:
<https://stoom-dev-ed-developer.my.salesforce.com>

Task 2: Creating Objects

1.Create Supplier object

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

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 Example: Account

Plural Label Example: Accounts

Starts with vowel sound

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

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

Content Name

Record Name Example: Account Name

Data Type **Warning:** If you plan to insert a high volume of records in this object, via the API for example, t

Optional Features

Allow Reports
 Allow Activities
 Track Field History
 Allow in Chatter Groups
 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.

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

In Development
 Deployed

Search Status

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

Allow Search

2.Create rice mill object.

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

 - Enter the label name >> rice mill
 - Plural label name >> rice mills
 - Enter Record Name Label and Format
 - Record Name >>
 - Data Type >> Auto Number
 - Display Format >> rice-{000}
 - Starting number >> 1

- Click on Allow reports and Track Field History, Allow Search and Save.

Edit Custom Object
rice mill

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	<input type="text" value="rice mill"/>	Example: Account
Plural Label	<input type="text" value="rice mills"/>	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	<input type="text" value="rice_mill"/>	Example: Account
-------------	--	------------------

Description

Context-Sensitive Help Setting

<input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window
<input type="radio"/> Open a window using a Visualforce page

Content Name

None

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 C

called "Name" when referenced via the API.

Record Name	<input type="text" value="rice mill Name"/>	Example: Account Name
Data Type	<input type="button" value="Auto Number"/>	Warning: If you plan to insert a high volume of records in this object, via the API for example, us
Display Format	<input type="text" value="rice-{000}"/>	Example: A-{0000} What Is This?

Optional Features

Allow Reports
 Allow Activities
 Track Field History
 Allow in Chatter Groups
 Enable Licensing

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 A

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

In Development
 Deployed

Search Status

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

Allow Search

3.Create consumer object.

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

Edit Custom Object
consumer

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 Example: Account

Plural Label Example: Accounts

Starts with vowel sound

The Object Name is used when referencing the object via the API.

Object Name 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

called "Name" when referenced via the API.

Record Name Example: Account Name

Data Type Warning: If you plan to insert a high volume of records in this object

Display Format Example: A-{0000} What Is This?

Optional Features

Allow Reports
 Allow Activities
 Track Field History
 Allow in Chatter Groups
 Enable Licensing

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 Standard object.

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

In Development
 Deployed

Search Status

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

Allow Search

4.Create rice details object.

1. Use these display format for the rice details

- label name >> rice details
- Plural label name >> rice details
- Display Format >> rice-{000}
- Starting Number >>1

[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	<input type="text" value="rice details"/> Example: Account
Plural Label	<input type="text" value="rice details"/> Example: Accounts
Starts with vowel sound	<input type="checkbox"/>

The Object Name is used when referencing the object via the API.

Object Name	<input type="text" value="rice_details"/> Example: Account
-------------	--

Description

Context-Sensitive Help Setting

<input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window
<input type="radio"/> Open a window using a Visualforce page

Content Name

[-None-](#) [▼](#)

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 is "Case Name".

Record Name	<input type="text" value="rice details Name"/> Example: Account Name
Data Type	<input type="button" value="Auto Number"/> Warning: If you plan to insert a high volume of records in this object, consider using a different data type.
Display Format	<input type="text" value="rice-{000}"/> Example: A-{0000} <u>What Is This?</u>

Optional Features

Allow Reports
 Allow Activities
 Track Field History
 Allow in Chatter Groups
 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 Standard object.

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

In Development
 Deployed

Search Status

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

Allow Search

Task 3: Creating Tabs

Create a custom tab for supplier object.

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(supplier) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.

The screenshot shows the 'Edit Custom Object Tab' page for the 'suppliers' object. At the top, there's a header with a gear icon and the word 'SETUP'. Below it, the word 'Tabs' is displayed. The main section is titled 'Edit Custom Object Tab suppliers'. A sub-section says 'Fill in the fields below to define the custom tab.' The 'Custom Tab Definition Edit' section contains 'Custom Object Tab Information'. It shows 'Tab Label' as 'suppliers', 'Object' as 'supplier', and 'Tab Style' as 'Helicopter' (with a small icon). There's a note about choosing a 'Splash Page Custom Link' with a dropdown menu set to '--None--'. Below that, there's a field for 'Enter a short description.' with a 'Description' placeholder and a large text input area. At the bottom are 'Save' and 'Cancel' buttons.

The screenshot shows the 'Custom Object Tab Detail' page for the 'suppliers' object. At the top, there's a header with a gear icon and the word 'SETUP'. Below it, the word 'Tabs' is displayed. The main section is titled 'Custom Object Tab suppliers'. A note says 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' section displays the following information:

Tab Label	suppliers	Edit	Delete
Object	supplier	Tab Style	
Description		Splash Page Custom Link	
Created By	Ishika Goyal, 26/07/2024, 7:21 pm	Modified By	Ishika Goyal, 07/08/2024, 12:59 pm

Create a custom tab for rice mill object.

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(rice mill) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.

Custom Tab Definition Edit

Custom Object Tab Information

Tab Label	rice mills
Object	rice mill
Tab Style	Gears

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

Enter a short description.

Description

Save Cancel

Custom Tab Definition Detail

Tab Label	rice mills	Tab Style	Gears
Object	rice mill	Splash Page Custom Link	
Description			
Created By	Ishika Goyal, 26/07/2024, 7:22 pm	Modified By	Ishika Goyal, 07/08/2024, 1:02 pm

Create a custom tab for consumer object.

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

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

Edit Custom Object Tab
consumers

Fill in the fields below to define the custom tab.

Custom Tab Definition Edit

Custom Object Tab Information

Tab Label	consumers
Object	<u>consumer</u>
Tab Style	Building

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

Enter a short description.

Description

Custom Tab Definition Detail

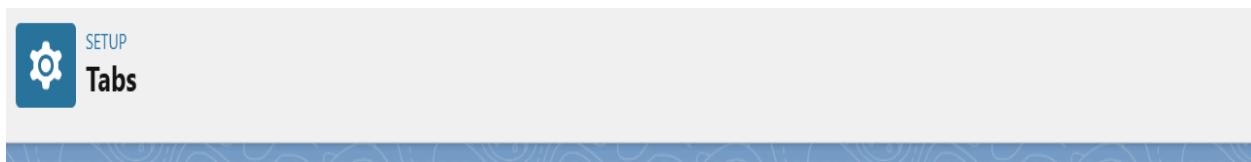
Tab Label	consumers	Tab Style	Building
Object	<u>consumer</u>	Splash Page Custom Link	
Description			
Created By	Ishika Goyal, 26/07/2024, 7:23 pm	Modified By	Ishika Goyal, 07/08/2024, 1:04 pm

Create a custom tab for rice details object.

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

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

The screenshot shows the 'Custom Tab Definition Edit' page for the 'rice details' tab. The tab label is 'rice details', the object is 'rice details', and the tab style is 'Radar dish'. There is a dropdown for 'Splash Page Custom Link' set to 'None'. A large text area for 'Description' is empty. At the bottom are 'Save' and 'Cancel' buttons.



Custom Object Tab
rice details

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

Custom Tab Definition Detail		Edit	Delete
Tab Label	rice details	Tab Style	Radar dish
Object	rice details	Splash Page Custom Link	
Description		Created By	Ishika Goyal, 26/07/2024, 7:23 pm
		Modified By	Ishika Goyal, 07/08/2024, 1:05 pm

Task 4: Creating a Lightning app

To create a lightning app page:

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

The screenshot shows the Salesforce Lightning Experience App Manager. The left sidebar has a 'Salesforce Mobile App' section with 'Data' and 'Apps' expanded. Under 'Apps', 'App Manager' is selected. The main area displays a table titled 'Lightning Experience App Manager' with 32 items. The columns are: App Name ↑, Developer Name, Description, Last Modified..., App Type, and Vi... (with dropdown arrows). The table lists various apps like All Tabs, Analytics Studio, App Launcher, etc., with their respective details and modification dates.

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.

App Details & Branding

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

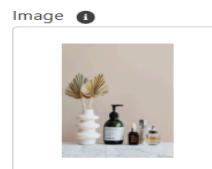
App Details

* App Name !
MY RICE

* Developer Name !
MY_RICE

Description !
Enter a description...

App Branding



Primary Color Hex Value !
#0070D2

Clear

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

App Launcher Preview



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

Navigation Items

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

Available Items

Type to filter list...

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

Selected Items

- suppliers
- rice mills
- consumers
- rice details

5. Select the items (supplier, rice mill, consumer)

6. To Add User Profiles:

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Type to filter list...

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website
- B2B Reordering Portal Buyer Profile
- Cleaner
- Contract Manager
- Cross Org Data Proxy User

Selected Profiles

- System Administrator

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

Task 5: Creating 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.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar says "SETUP > OBJECT MANAGER". Below it, the object name "rice details" is displayed. On the left, there's a sidebar with various layout options like Page Layouts, Lightning Record Pages, etc. The main area is titled "Fields & Relationships" and shows a table of existing fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
rice details Name	Name	Auto Number		✓
rice distributed	rice_distributed_c	Number(5, 0)		
rice mill 1(one)	rice_mill_1_one_c	Master-Detail(rice mill)		✓
supplier Name	supplier_Name_c	Master-Detail(supplier)		✓

3. Select Data type as “Number” and click Next.
4. Given the Field Label as “ rice distributed ” and length as “ 5 ”.

The screenshot shows the "Custom Field Definition Edit" screen for the "rice distributed" field. At the top, it says "Edit rice details Custom Field rice distributed". The main form has several sections:

- Field Information:** Shows the Field Label ("rice distributed") and Field Name ("rice_distributed").
- General Options:** Includes a "Required" checkbox and a note about requiring a value.
- Compliance Categorization:** A section where you can map categories from "Available" (PII, HIPAA, GDPR, PCI) to "Chosen".

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

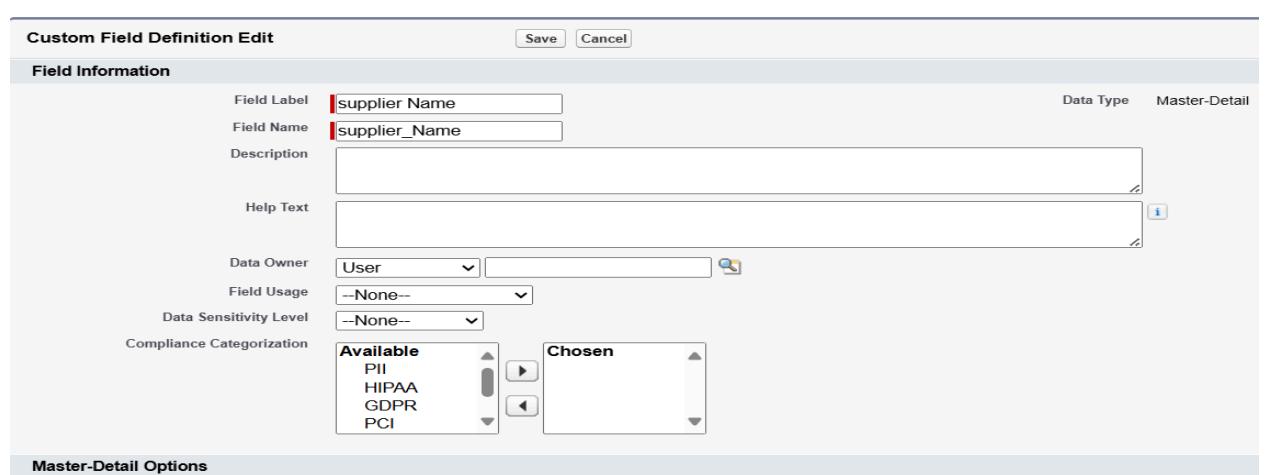
Creating junction object as rice details with supplier & rice mill

To create junction object

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

Edit rice details Custom Field
supplier Name

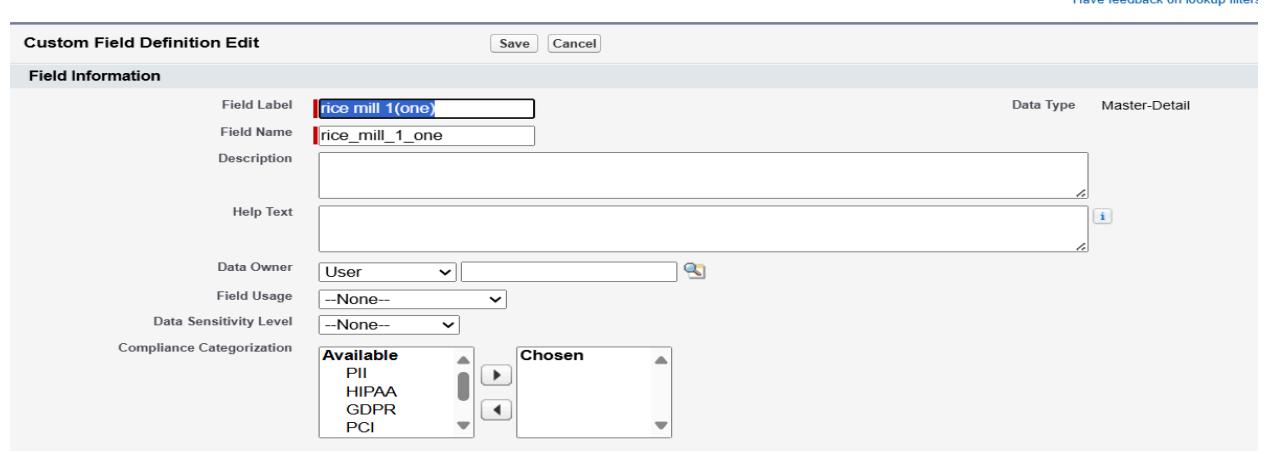
Have feedback on loc



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.

Edit rice details Custom Field
rice mill 1(one)

Have feedback on lookup filters



Creating Master-Detail Relationship between consumer & rice mill Object

To Create a Master-Detail relationship

1. Go to the setup page >> click on object manager >> From 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.

Edit consumer Custom Field
rice mill name Have feedback on look

Custom Field Definition Edit Save Cancel

Field Information

Field Label	<input type="text" value="rice mill name"/>	Data Type	Master-Detail										
Field Name	<input type="text" value="rice_mill_name"/>												
Description	<input type="text"/>												
Help Text	<input type="text"/>												
Data Owner	User	<input type="text"/>											
Field Usage	--None--												
Data Sensitivity Level	--None--												
Compliance Categorization	<table border="1"><tr><td>Available</td><td>Chosen</td></tr><tr><td>PII</td><td></td></tr><tr><td>HIPAA</td><td></td></tr><tr><td>GDPR</td><td></td></tr><tr><td>PCI</td><td></td></tr></table>			Available	Chosen	PII		HIPAA		GDPR		PCI	
Available	Chosen												
PII													
HIPAA													
GDPR													
PCI													

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

1. Go to setup >> click on Object Manager >> type object name(supplier) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select the data type as “Rollup summary”, and click Next.
4. Give the Field label as “sum of rice distributed”, Field Name will be Auto generated, and click Next.

Edit supplier Custom Field
sum of rice distributed

Custom Field Definition Edit Save Cancel

Field Information

Field Label	<input type="text" value="sum of rice distributed"/>
Field Name	<input type="text" value="sum_of_rice_distributed"/>

5. Select the summarized 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.

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 <input type="button" value="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

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.

Edit supplier Custom Field
rice distributed to shops

Custom Field Definition Edit

Field Information

Field Label	<input type="text" value="rice distributed to shops"/>
Field Name	<input type="text" value="rice_distributed_to_shops"/>

10. Select the summarized 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.

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 <input type="button" value="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

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

Edit consumer Custom Field
rice taken by shops in kgs

Custom Field Definition Edit

Field Information

Field Label	rice taken by shops in kgs	Data Type	Number
Field Name	rice_taken_by_shops_in_kg		
Description			
Help Text			
Data Owner	User		
Field Usage	None		
Data Sensitivity Level	None		
Compliance Categorization	Available	Chosen	
	PII		
	HIPAA		
	GDPR		
	PCI		

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.

Edit rice mill Custom Field
rice taken

Custom Field Definition Edit

Field Information

Field Label	rice taken	Save	Cancel
Field Name	rice_taken		
Description			
Help Text			

16. Select the summarized 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.

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	rice mill
Summarized Object	consumers

Select Roll-Up Type

<input type="radio"/> COUNT	<input checked="" type="radio"/> SUM	<input type="radio"/> MIN	<input type="radio"/> MAX
		Field to Aggregate <input type="text" value="Rice taken by shops"/>	

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

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 “master detail” and click Next.
4. Given the Field Label as “ supplier name ” and length as “ 5
5. Field Name will be auto populated, and click on Next>> Next >>Save.

Creating Fields in rice mill Objects

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar says "SETUP > OBJECT MANAGER" and "rice mill". On the left, there's a sidebar with various options like Details, Fields & Relationships, Page Layouts, etc. The "Fields & Relationships" tab is selected. In the main area, there's a list of field types with "Number" selected. A tooltip for "Number" explains: "Allows users to enter any number. Leading zeros are removed." Other field types listed include Auto Number, Formula, Roll Up Summary, Lookup Relationship, Master-Detail Relationship, External Lookup Relationship, Checkbox, Currency, Date, Date/Time, Email, Geolocation, and Percent.

The screenshot shows the "New Custom Field" configuration screen. It's on "Step 2. Enter the details".
Field Label: rice price/kg
Length: 5
Decimal Places: 0
Field Name: rice_price_kg
Description: (empty)
Help Text: (empty)
Required: Always require a value in this field in order to save a record
Unique: Do not allow duplicate values
External ID: Set this field as the unique record identifier from an external system
AI Prediction: Use this field to store AI prediction scores

Creating Fields in consumer Objects

1. Create a “First name” field, Data Type - “text”.

The screenshot shows the Salesforce Object Manager interface for creating a custom field. The left sidebar lists various layout types: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area displays the 'consumer Custom Field' named 'First name'. The 'Field Information' section shows the field label as 'First name', field name as 'First_name', and API name as 'First_name__c'. The object name is 'consumer' and the data type is 'Text'. The 'General Options' section includes checkboxes for Required, Unique, Case Sensitive, External ID, and Default Value, all of which are unchecked. The 'Text Options' section is collapsed. At the bottom right, there are buttons for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. A status bar at the bottom indicates 'Created By Ishika Goyal, 26/07/2024, 7:58 pm' and 'Modified By Ishika Goyal, 26/07/2024, 7:58 pm'.

2. Create a “Last name” field, Data Type - “text”.

The screenshot shows the Salesforce Object Manager interface for creating another custom field. The left sidebar is identical to the previous screenshot. The main content area displays the 'consumer Custom Field' named 'Last name'. The 'Field Information' section shows the field label as 'Last name', field name as 'Last_name', and API name as 'Last_name__c'. The object name is 'consumer' and the data type is 'Text'. The 'General Options' section includes checkboxes for Required, Unique, Case Sensitive, External ID, and Default Value, all of which are unchecked. The 'Text Options' section is collapsed. At the bottom right, there are buttons for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. A status bar at the bottom indicates 'Created By Ishika Goyal, 26/07/2024, 7:59 pm' and 'Modified By Ishika Goyal, 26/07/2024, 7:59 pm'.

3. Create a “Phone number” field, Data Type - “phone”.

SETUP > OBJECT MANAGER consumer

Phone number

Back to consumer Validation Rules [0]

Custom Field Definition Detail Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information		Object Name consumer
Field Label	Phone number	Data Type Phone
Field Name	Phone_number	
API Name	Phone_number_c	
Description		
Help Text		
Data Owner		
Field Usage		
Data Sensitivity Level		
Compliance Categorization		
Created By	Ishika_Goyal, 26/07/2024, 8:00 pm	Modified By Ishika Goyal, 26/07/2024, 8:00 pm

General Options

Required	<input type="checkbox"/>
Default Value	

Validation Rules New Validation Rules Help ?

No validation rules defined.

4. Create a “email” field, Data Type - “email”.

SETUP > OBJECT MANAGER consumer

email

Back to consumer Validation Rules [0]

Custom Field Definition Detail Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information		Object Name consumer
Field Label	email	Data Type Email
Field Name	email	
API Name	email_c	
Description		
Help Text		
Data Owner		
Field Usage		
Data Sensitivity Level		
Compliance Categorization		
Created By	Ishika Goyal, 26/07/2024, 8:00 pm	Modified By Ishika Goyal, 26/07/2024, 8:00 pm

General Options

Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
Default Value	

Validation Rules New Validation Rules Help ?

5. Create a “Rice taken by shops” field, Data Type - “Number”,length=5.

SETUP > OBJECT MANAGER consumer

Rice taken by shops

Back to consumer Validation Rules [0]

Custom Field Definition Detail Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information		Object Name consumer
Field Label	Rice taken by shops	Data Type Number
Field Name	Rice_taken_by_shops	
API Name	Rice_taken_by_shops_c	
Description		
Help Text		
Data Owner		
Field Usage		
Data Sensitivity Level		
Compliance Categorization		
Created By	Ishika Goyal, 26/07/2024, 8:01 pm	Modified By Ishika Goyal, 26/07/2024, 8:01 pm

General Options

Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
AI Prediction	<input type="checkbox"/>
Default Value	

Number Options

6. Create a “Rice type” field, Data Type - “Picklist”.

Picklist values-

1. Basmati
2. Normal rice

consumer Custom Field
Rice type

Custom Field Definition Detail

Field Information

- Field Label: Rice type
- Field Name: Rice_type
- API Name: Rice_type__c
- Description
- Help Text
- Data Owner
- Field Usage
- Data Sensitivity Level
- Compliance Categorization

Created By: Ishika_Goyal, 26/07/2024, 8:02 pm Modified By: Ishika_Goyal, 26/07/2024, 8:02 pm

General Options

- Required:
- Default Value:

Picklist Options

- Restrict picklist to the values defined in the value set:
- Controlling Field: [\[New\]](#)

Picklist Options

- Restrict picklist to the values defined in the value set:
- Controlling Field: [\[New\]](#)

Picklist Values Used

Active and Inactive picklist values: 2 (1,000 max)

Field Dependencies

No dependencies defined.

Validation Rules

No validation rules defined.

Values

Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> Edit Del Deactivate	basmati	basmati	<input type="checkbox"/>	Assigned dynamically	Ishika_Goyal, 26/07/2024, 8:02 pm
<input type="checkbox"/> Edit Del Deactivate	normal rice	normal rice	<input type="checkbox"/>	Assigned dynamically	Ishika_Goyal, 26/07/2024, 8:02 pm

Inactive Values

No Inactive Values values defined.

7. Create a “Mode of payment” field, Data Type - “Picklist”.

Picklist values-

- Credit card
- Debit card
- Net banking
- UPI
- Cash

SETUP > OBJECT MANAGER
consumer

Mode of payment

Back to consumer

Validation Rules (0)

Custom Field Definition Detail

Field Label: Mode of payment
Field Name: Mode_of_payment
API Name: Mode_of_payment_c
Description:
Help Text:
Data Owner:
Field Usage:
Data Sensitivity Level:
Compliance Categorization:
Created By: Ishika.Goyal, 26/07/2024, 8:03 pm
Modified By: Ishika.Goyal, 26/07/2024, 8:03 pm

Object Name: consumer
Data Type: Picklist

General Options
Required:
Default Value:

Picklist Options
Restrict picklist to the values defined in the value set:
Controlling Field:

SETUP > OBJECT MANAGER
consumer

Picklist Values Used
Active and inactive picklist values: 5 (1,000 max)

Field Dependencies
No dependencies defined.

Validation Rules
No validation rules defined.

Values

Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> Edit Del Deactivate	Credit card	Credit card	<input type="checkbox"/>	Assigned dynamically	Ishika.Goyal, 26/07/2024, 8:03 pm
<input type="checkbox"/> Edit Del Deactivate	Debit card	Debit card	<input type="checkbox"/>	Assigned dynamically	Ishika.Goyal, 26/07/2024, 8:03 pm
<input type="checkbox"/> Edit Del Deactivate	Net banking	Net banking	<input type="checkbox"/>	Assigned dynamically	Ishika.Goyal, 26/07/2024, 8:03 pm
<input type="checkbox"/> Edit Del Deactivate	UPI	UPI	<input type="checkbox"/>	Assigned dynamically	Ishika.Goyal, 26/07/2024, 8:03 pm
<input type="checkbox"/> Edit Del Deactivate	Cash	Cash	<input type="checkbox"/>	Assigned dynamically	Ishika.Goyal, 26/07/2024, 8:03 pm

Inactive Values
No Inactive Values values defined.

Creating Cross Object Formula Field in consumer Object

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

Edit consumer Custom Field
Amount Paid

Help

Custom Field Definition Edit

Field Information

Field Label	<input type="text" value="Amount Paid"/>	Save Quick Save Cancel
Field Name	<input type="text" value="Amount_Paid"/>	! ≈ Requested
Description	<input type="text"/>	
Help Text	<input type="text"/>	
Data Owner	User	<input type="button" value=""/>
Field Usage	--None--	
Data Sensitivity Level	--None--	
Compliance Categorization	Available PII HIPAA GDPR PCI	Chosen

Formula Options

5. Insert fields formula should be :

rice_taken_by_shops_c * rice_mill_name__r.rice_price_kg_c

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

Simple Formula **Advanced Formula**

Insert Field **Insert Operator**

Amount Paid (Number) =

```
Rice_taken_by_shops_c * rice_mill_name__r.rice_price_kg_c
```

Functions

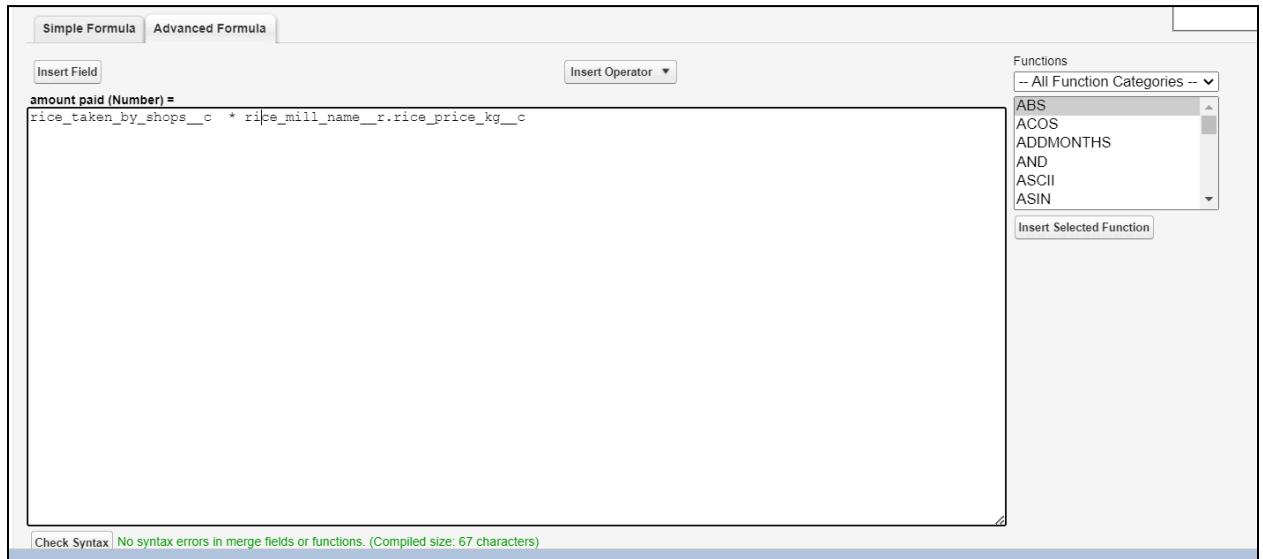
- All Function Categories --
- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function

Check Syntax

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

6. Insert field formula should be : First_Name__c + '' + Last_Name__c
7. click “Check Syntax” and Save.



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.

The screenshot shows the Salesforce Object Manager for the "consumer" object. On the left, there is a sidebar with various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled "Validation Rules" and shows one item: "Phonenumberoremailblankrule". This row has columns for RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, and MODIFIED BY. The "ACTIVE" column has a checked checkbox, and the "MODIFIED BY" column shows "Ishika Goyal, 26/07/2024, 8:11 pm".

3. Enter the Rule name as “Phonenumberoremailblankrule ”.
4. Enter the description as “phone number and email number should not be blank”.
5. Enter the formula as “OR(ISBLANK(phone_number__c), ISBLANK(email__c))” and check the syntax.

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Save Save & New Cancel

Rule Name: **Phonenumberoremailblankrule**

Active:

Description: phone number and email number should not be blank

Error Condition Formula

Example: **Discount_Percent_c>0.30** More Examples...

Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

Insert Field Insert Operator ▾

OR(ISBLANK(Phone_number_c), ISBLANK(email_c))

Functions

-- All Function Categories -- ▾

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

Insert Selected Function

ABS(number)
Returns the absolute value of a number, a number without its sign

Help on this function

Check Syntax No errors found

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

Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

Insert Field Insert Operator ▾

OR(ISBLANK(Phone_number_c), ISBLANK(email_c))

Functions

-- All Function Categories -- ▾

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

Insert Selected Function

ABS(number)
Returns the absolute value of a number, a number without its sign

Help on this function

Check Syntax No errors found

Error Message

Example: **Discount percent cannot exceed 30%**

This message will appear when Error Condition formula is **true**

Error Message: **please fill in your phone number.**

This error message can either appear at the top of the page or below a specific field on the page

Error Location: Top of Page Field [i](#)

Save Save & New Cancel

8. Save the validation rule.

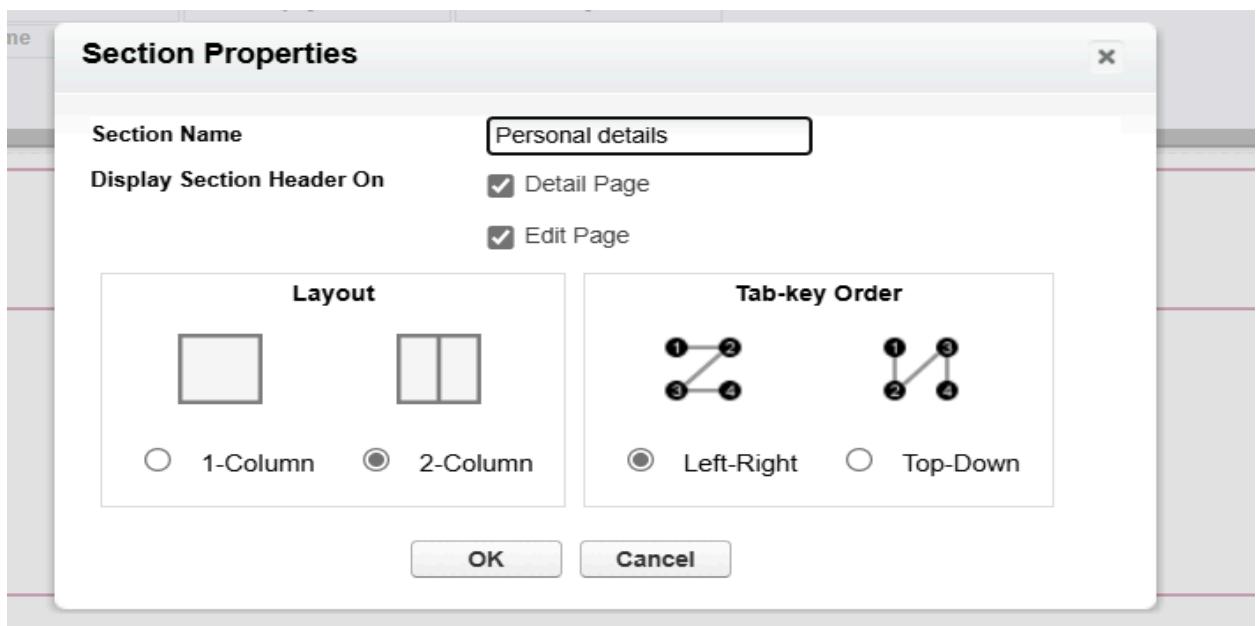
Task 6: Creating a Page Layout

To Create a Page layout:

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

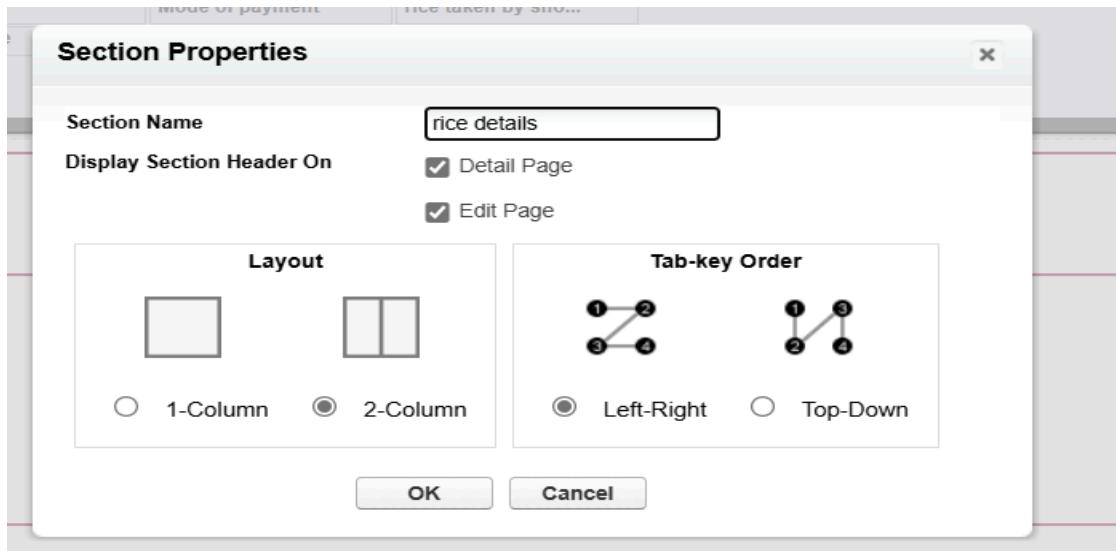
The screenshot shows the Salesforce Object Manager interface for the 'consumer' object. The left sidebar has a 'Page Layouts' section selected. The main area displays a table titled 'Page Layouts' with one item: 'consumer Layout'. The table includes columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The 'consumer Layout' was created by 'Ishika Goyal' on 26/07/2024, 7:18 pm, and modified by 'Ishika Goyal' on 07/08/2024, 11:02 am. There are buttons for 'Quick Find', 'New', and 'Page Layout' at the top right of the table area.

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 consumer details and create the section.
5. Enter the section name as “Personal details”, - click Ok.

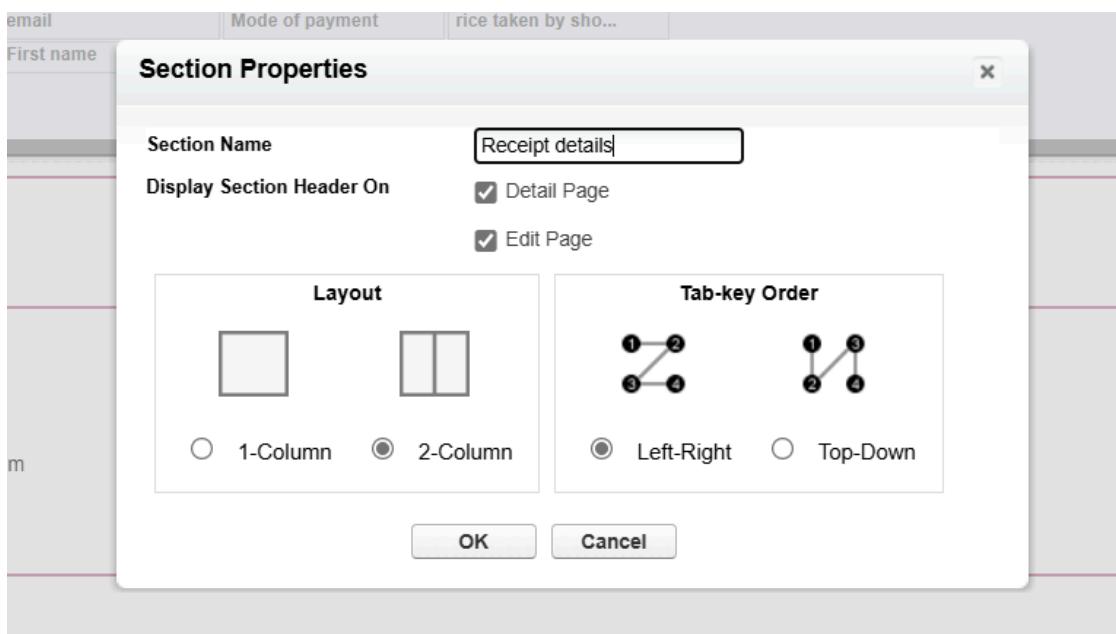


7. Now drag the fields to this section that mentioned , they are
 - First name , last name , consumer name , phone number, email, rice mill name.

8. Follow the same process for another two sections as shown above , they are
9. One section is “ rice details ” , drag the fields that are
 - Rice taken by shop, rice type.



10. Another section is “Receipt details ”, and drag the fields that are
 - Mode of payment , Amount paid.



11. Then , Click save.

The screenshot shows the Salesforce Layout Properties interface. The top navigation bar includes Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. On the left, a sidebar titled 'Fields' lists: Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. A 'Quick Find' search bar is present. The main area displays a form layout with several sections:

- rice details**:
 - Rice type: Sample Text
 - Rice taken by shops: 97,020
- Personal details**:
 - First name: Sample Text
 - Last name: Sample Text
 - Consumer Name:
 - email: sarah.sample@company.com
 - rice mill name: **Sample Text** (marked with a red star)
 - Phone number: 1-415-555-1212
- Receipt details**:
 - Amount Paid: 422.97
 - Mode of payment: Sample Text
- Information** (Header visible on edit only):
 - consumer Name: GEN-2004-001234

Task 7: Creating Profiles

Owner Profile

To create a new profile:

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

The screenshot shows the Salesforce Setup interface for creating a new profile. The top navigation bar includes 'SETUP' and 'Profiles'. The main area displays a profile named 'owner' with the following details:

Description	Assigned Users
User License: Salesforce Created By: Ishika Goyal, 31/07/2024, 7:25 pm	Custom Profile <input checked="" type="checkbox"/> Last Modified By: Ishika Goyal, 07/08/2024, 10:47 am

The 'Apps' section contains several settings groups:

- Assigned Apps**: Settings that specify which apps are visible in the app menu.
- Assigned Connected Apps**: Settings that specify which connected apps are visible in the app menu.
- Object Settings**: Permissions to access objects and fields, and settings that specify which record types, page layouts, and tabs are visible.
- App Permissions**: Permissions to perform app-specific actions, such as "Manage Call Centers".
- Apex Class Access**: Permissions to execute Apex classes.
- Visualforce Page Access**: Permissions to execute Visualforce pages.
- External Data Source Access**: Permissions to authenticate against external data sources.

At the bottom left, there is a note: "Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform" followed by a "Learn More" link.

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.

The screenshot shows the 'consumers' profile configuration in the Salesforce Setup. The 'Object Permissions' section is expanded, showing the following table:

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input checked="" type="checkbox"/>
Modify All	<input checked="" type="checkbox"/>

The 'Field Permissions' section is also visible, showing the following table:

Field Name	Field API Name	Read Access	Edit Access
Amount Paid	Amount_Paid__c	<input checked="" type="checkbox"/>	<input type="checkbox"/>
consumer Name	Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Consumer Name	Consumer_Name__c	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created By	CreatedBy	<input checked="" type="checkbox"/>	<input type="checkbox"/>

3. Give access and save it.

Employer Profile

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

The screenshot shows the 'Profiles' section under 'SETUP'. It displays two tables of object permissions:

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

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

5. And click save.

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

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

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

5. And click save.

Task 8: Creating Roles

Creating owner role

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

The screenshot shows the Salesforce Setup Roles page. On the left, there's a sidebar with categories like Users, Feature Settings, Sales, Service, and Case Teams. Under Sales, 'Contact Roles on Contracts' and 'Contact Roles on Opportunities' are listed. Under Service, 'Case Team Roles' and 'Contact Roles on Cases' are listed. A search bar at the top says 'roles'. The main content area is titled 'Understanding Roles' and contains a 'Sample Role Hierarchy' diagram. The hierarchy is as follows:

```
graph TD
    ExecutiveStaff[Executive Staff] --> President[President]
    ExecutiveStaff --> CFO[CFO]
    ExecutiveStaff --> VPSales[VP, Sales]
    President --> WesternSalesDir[Western Sales Director]
    President --> EasternSalesDir[Eastern Sales Director]
    President --> InternationalSalesDir[International Sales Director]
    WesternSalesDir --> CARep[Western Sales Rep]
    WesternSalesDir --> ORRep[OR Sales Rep]
    EasternSalesDir --> NYRep[NY Sales Rep]
    EasternSalesDir --> MAREP[MA Sales Rep]
    InternationalSalesDir --> AsianRep[Asian Sales Rep]
    InternationalSalesDir --> EuropeanRep[European Sales Rep]
```

Each role has associated descriptions:

- Executive Staff:** * View & edit data, roll up forecasts, & generate reports for all users below
* Can't access data of other Executive Staff
- President:** * View & edit data, roll up forecasts, & generate reports for all users directly below
* Can't access data of users above or at same level
- CFO:** * View & edit data, roll up forecasts, & generate reports for all users directly below
* Can't access data of users above or at same level
- VP, Sales:** * View & edit data, roll up forecasts, & generate reports for all users directly below
* Can't access data of users above or at same level
- Western Sales Director:** * View & edit data, roll up forecasts, & generate reports for all users directly below
* Can't access data of users above or at same level
- Eastern Sales Director:** * View & edit data, roll up forecasts, & generate reports for all users directly below
* Can't access data of users above or at same level
- International Sales Director:** * View & edit data, roll up forecasts, & generate reports for all users directly below
* Can't access data of users above or at same level
- Western Sales Rep:** * View & edit data, roll up forecasts, & generate reports for all users directly below
* Can't access data of users above or at same level
- OR Sales Rep:** * View & edit data, roll up forecasts, & generate reports for all users directly below
* Can't access data of users above or at same level
- NY Sales Rep:** * View & edit data, roll up forecasts, & generate reports for all users directly below
* Can't access data of users above or at same level
- MA Sales Rep:** * View & edit data, roll up forecasts, & generate reports for all users directly below
* Can't access data of users above or at same level
- Asian Sales Rep:** * View & edit data, roll up forecasts, & generate reports for all users directly below
* Can't access data of users above or at same level
- European Sales Rep:** * View & edit data, roll up forecasts, & generate reports for all users directly below
* Can't access data of users above or at same level

At the bottom right of the main content area are 'Set Up Roles' and 'Don't show this page again' buttons.

2. Click on Expand All and click on add role under whom this role works.
3. Give Label as “owner” and Role name gets auto populated. Then click on Save.

The screenshot shows the Salesforce Role Edit page for the 'owner' role. The title bar says 'SETUP Roles' and the sub-page title is 'Role Edit owner'. The form fields are as follows:

Label	owner
Role Name	owner
This role reports to	CEO
Role Name as displayed on reports	(empty field)
Opportunity Access	<input type="radio"/> Users in this role cannot access opportunities that they do not own that are associated with accounts that they do own <input type="radio"/> Users in this role can view all opportunities associated with accounts that they own, regardless of who owns the opportunities <input checked="" type="radio"/> Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
Case Access	<input checked="" type="radio"/> Users in this role cannot access cases that they do not own that are associated with accounts that they do own <input type="radio"/> Users in this role can view all cases associated with accounts that they own, regardless of who owns the cases <input type="radio"/> Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases

At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

1. Click and save it.

Creating employer roles

Creating another two roles under manager

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

The screenshot shows the 'Role Edit' screen for creating a new role. The 'Label' field contains 'employer'. The 'Role Name' field also contains 'employer'. The 'This role reports to' field has 'owner' selected. Under 'Opportunity Access', the radio button for 'Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities' is selected. Under 'Case Access', the radio button for 'Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases' is selected. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

4. Repeat the same steps, for another role.
5. Click plus on 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 shows the 'Role Edit' screen for creating a new role. The 'Label' field contains 'worker'. The 'Role Name' field also contains 'worker'. The 'This role reports to' field has 'employer' selected. Under 'Opportunity Access', the radio button for 'Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities' is selected. Under 'Case Access', the radio button for 'Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases' is selected. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

Task 9: Creating Users

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

The screenshot shows the 'User Edit' page for a user named 'vicky y'. The page is titled 'User Edit' and has tabs for 'Save', 'Save & New', and 'Cancel'. The main section is 'General Information'.

Field	Value
First Name	vicky
Last Name	y
Alias	vy
Email	gishika373@gmail.com
Username	gishi@gmail.com
Nickname	vicky
Title	
Company	
Department	
Division	

On the right side, there are dropdown menus for 'Role' (set to 'owner'), 'User License' (set to 'Salesforce'), and 'Profile' (set to 'owner'). There are also several checkboxes for various user types, with 'Active' checked. At the bottom, there are additional settings like 'Data.com User Type' (set to 'None'), 'Data.com Monthly Addition Limit' (set to 300), 'Accessibility Mode (Classic Only)', and 'High-Contrast Palette on Charts'.

12. Save it.

Similarly, Creating another user –

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

10. User license : Salesforce platform

11. Profiles : standard platform user.

User Edit

ram ram

General Information

First Name	ram
Last Name	ram
Alias	rram
Email	gishika373@gmail.com
Username	gishishi@gmail.com
Nickname	ramm
Title	
Company	
Department	
Division	

Advanced

Role	employer
User License	Salesforce Platform
Profile	Standard Platform User
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Data.com User Type	--None--
Data.com Monthly Addition Limit	300
Accessibility Mode (Classic Only)	<input type="checkbox"/>
High-Contrast Palette on Charts	<input type="checkbox"/>

Again, Creating another user –

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

SETUP

Users

User Edit

ragu raj

Help for this Page

User Edit

Save Save & New Cancel

General Information

I = Required Information

First Name	ragu	Role	worker
Last Name	raj	User License	Salesforce Platform
Alias	rraj	Profile	Standard Platform User
Email	gishika373@gmail.com	Active	<input checked="" type="checkbox"/>
Username	gishikaaa@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	rraj	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	-None-
		Data.com Monthly Addition Limit	300
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>

Task 10: Permission Sets

Creating OWD setting.

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

The screenshot shows the Salesforce Sharing Settings page. At the top, there's a navigation bar with Setup, Home, and Object Manager. A search bar contains the text "shar". On the left, a sidebar under Security includes options like Guest User Sharing Rule Access Report and Sharing Settings, with Sharing Settings selected. Below the sidebar is a message about global search. The main content area is titled "Sharing Settings" and contains a table for "Default Sharing Settings". The table has two sections: "Organization-Wide Defaults" and "Grant Access Using Hierarchies". The "Organization-Wide Defaults" section lists various objects (Lead, Account and Contract, Contact, Order, Asset, Opportunity, Case, Campaign, Campaign Member, User, Activity) with their default internal access levels (e.g., Public Read/Write/Transfer, Private, Controlled by Parent). The "Grant Access Using Hierarchies" section lists the same objects with their default external access levels (e.g., Private, Controlled by Parent) and checkboxes for "Grant Access Using Hierarchies".

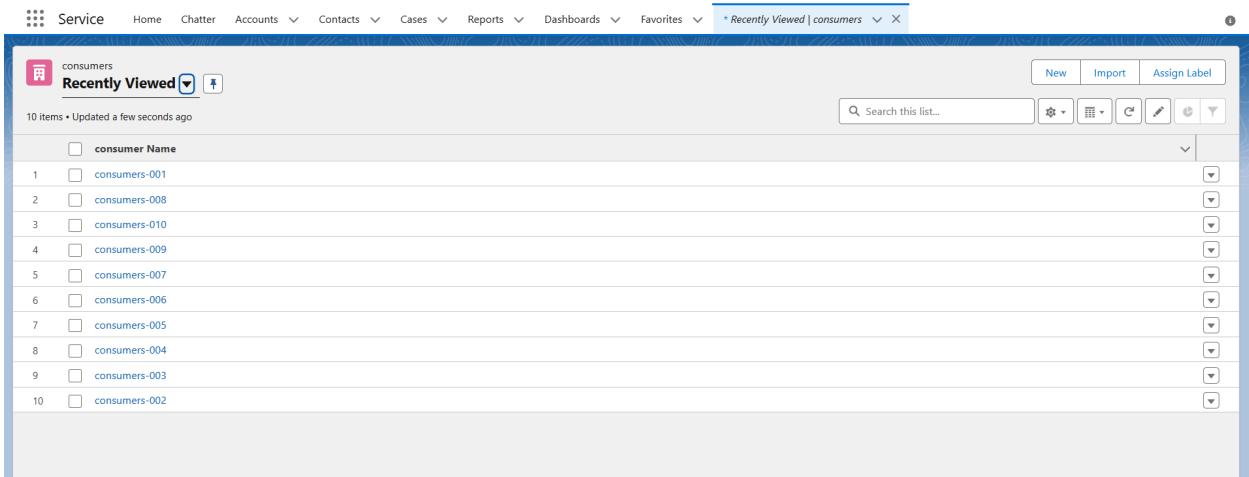
Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Private	Private	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked=""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

2. Scroll down, change the default internal access to “ public read-only” for rice mill and supplier object.
3. Click save.

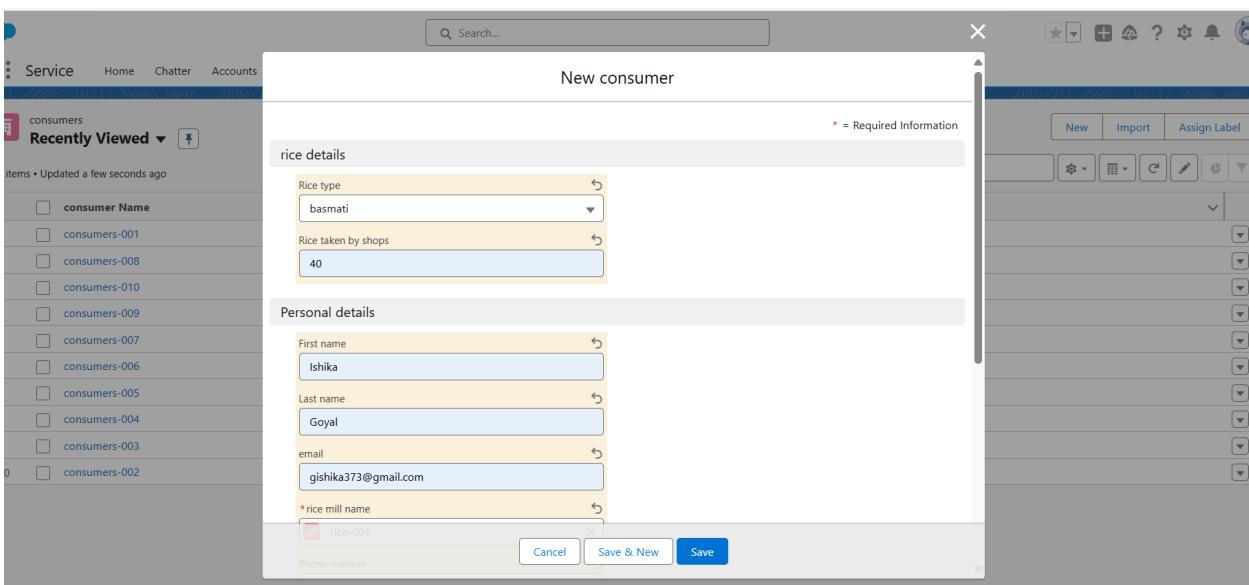
Task 11: Creating Report

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

1. Go to App Launcher >> Consumers >> New.



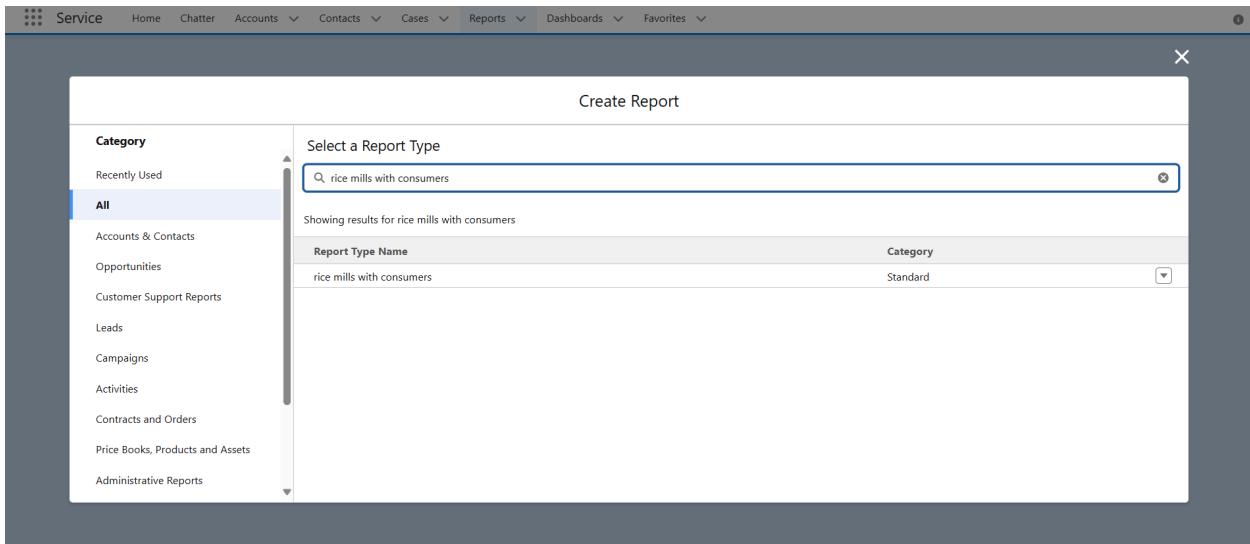
2. Fill all the Details.



3. Click Save and New.

Creating a 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” 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.
 - 1.consumer name
 - 2.rice type
 - 3.rice price/kg
 - 4.mode of payments
 - 5.amount paid
5. Remove the unnecessary fields.
6. Select the fields that are mentioned below in the GROUP ROWS section.
 - a. Rice taken by shops

	consumer: consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
8 (1)	consumers-001	normal rice	50	UPI	400.00
Subtotal			50		400.00
10 (1)	consumers-002	normal rice	40	Cash	400.00
Subtotal			40		400.00
30 (1)	consumers-003	basmati	30	Debit card	900.00
Subtotal			30		900.00
34 (1)	consumers-009	basmati	50	Cash	1,700.00
Subtotal			50		1,700.00
40 (2)	consumers-006	basmati	80	UPI	3,200.00
	consumers-005	normal rice	70	Net banking	2,800.00
Subtotal			150		6,000.00
42 (1)	consumers-008	normal rice	30	Credit card	1,260.00
Subtotal			30		1,260.00
45 (1)	consumers-007	basmati	40	Debit card	1,800.00
Subtotal			40		1,800.00
60 (1)	consumers-004	basmati	40	Credit card	2,400.00

7. Click save and run and save the report as “range of amount per day”.and save it.

Rice taken by shops	consumer: consumer Name	Rice type	rice price/kg	Mode of payment	Amount Paid
8 (1)	consumers-001	normal rice	50	UPI	400.00
Subtotal			50		400.00
10 (1)	consumers-002	normal rice	40	Cash	400.00
Subtotal			40		400.00
30 (1)	consumers-003	basmati	30	Debit card	900.00
Subtotal			30		900.00
34 (1)	consumers-009	basmati	50	Cash	1,700.00
Subtotal			50		1,700.00
40 (2)	consumers-006	basmati	80	UPI	3,200.00
	consumers-005	normal rice	70	Net banking	2,800.00
Subtotal			150		6,000.00
42 (1)	consumers-008	normal rice	30	Credit card	1,260.00
Subtotal			30		1,260.00
45 (1)	consumers-007	basmati	40	Debit card	1,800.00
Subtotal			40		1,800.00

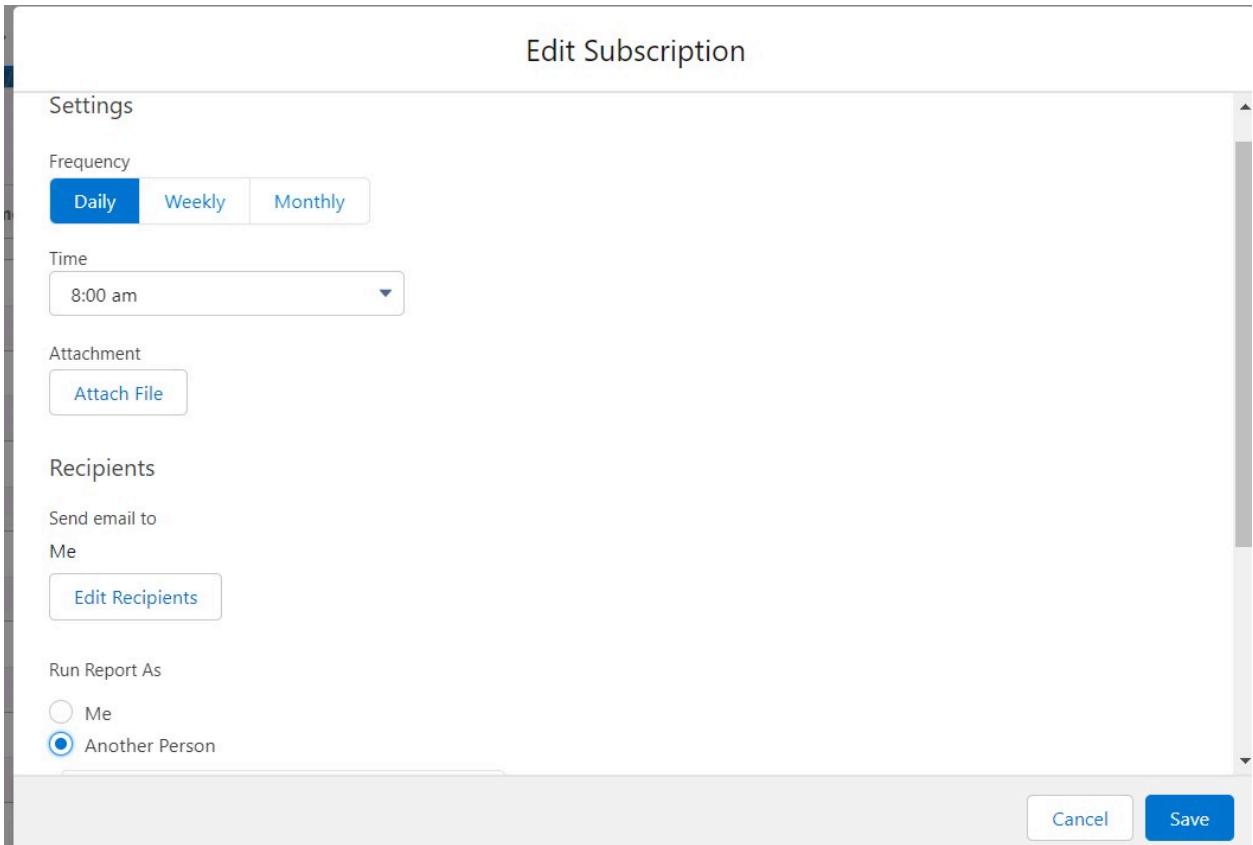
Row Counts Detail Rows Subtotals Grand Total

Sharing report to owner

1. Click edit drop down and select subscribe option

The screenshot shows the same report interface as above, but with the 'Edit' button in the top right corner replaced by a dropdown menu. The 'Subscribe' option is highlighted in blue, while other options like 'Save As', 'Save', 'Export', 'Delete', and 'Add to Dashboard' are listed below it.

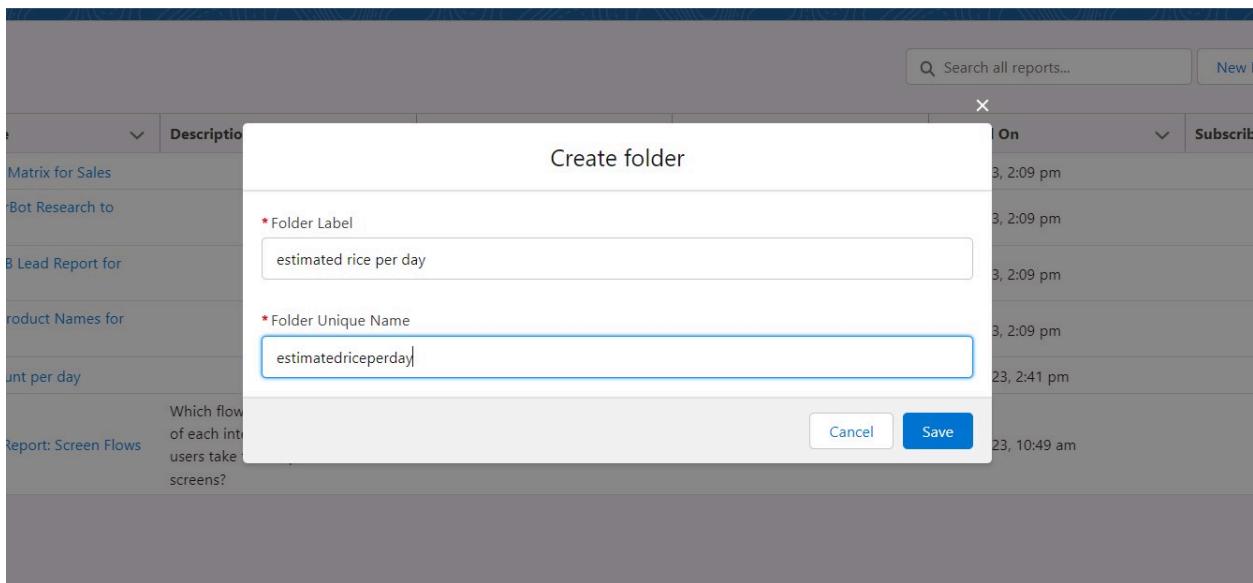
2. Follow as per below image.



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

Create a report folder

1. Click on the app launcher and search for reports.
2. Double click on the report, “ reports tab” will be auto populated in the navigation bar.
3. Click on the report tab, click on the new folder.
4. Give the Folder label as “estimated rice per day ”, Folder unique name will be auto populated.
5. Click save.

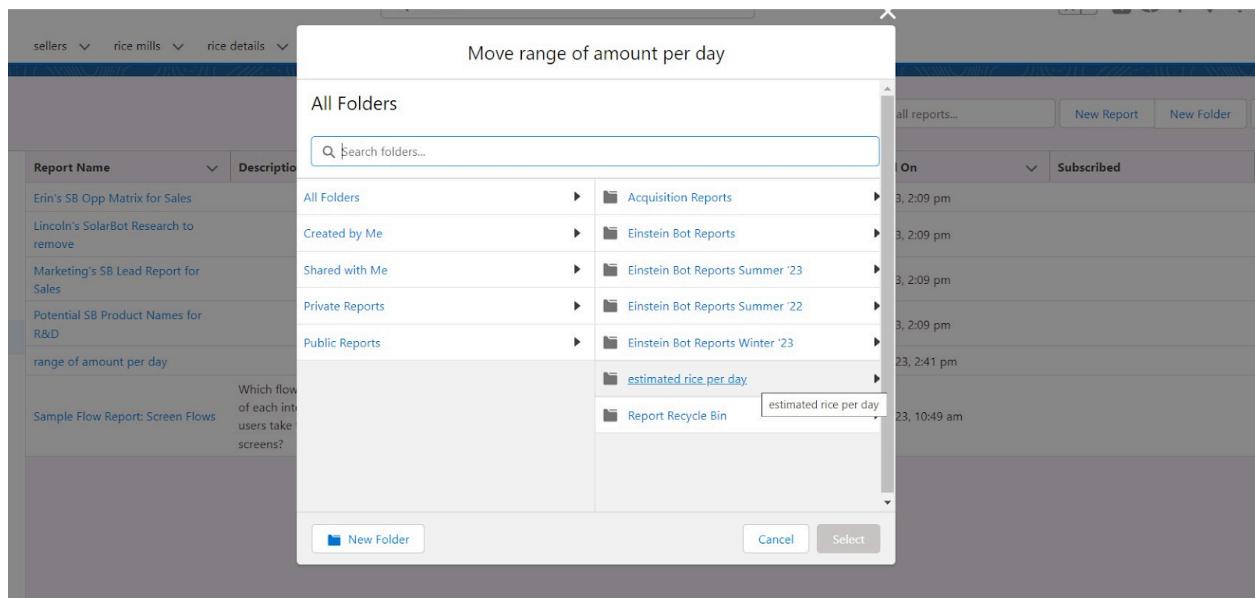


1. navigate to app launcher and click reports on that.
2. click all reports.
3. Select the range of amount per day drop down in that click move.

The screenshot shows the Salesforce Reports interface. On the left, there's a sidebar with categories like Reports, Folders, and Favorites. The main area displays a list of reports. One report, titled "estimated rice per day", has a context menu open over it. The menu includes options for Run, Edit, Subscribe, Export, Delete, Add to Dashboard, Favorite, and Move. The "Move" option is specifically highlighted with a blue box.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Opportunities by Rep and Close Month	ties do your sales reps have in the pipeline and when do they close?	Global Sales Reports	Ishika Goyal	27/11/2023, 7:25 pm	Run
Created by Me	Opportunities to Work		Public Reports	Ishika Goyal	27/11/2023, 3:37 pm	Edit
Private Reports	Opportunity Stages	How big are the deals at each stage in the pipeline this FQ?	Private Reports	Ishika Goyal	27/11/2023, 4:21 pm	Subscribe
Public Reports	Pipeline Matrix Report Current FQ	estimated rice per day	Global Sales Reports	Ishika Goyal	27/11/2023, 7:33 pm	Export
All Reports	range of amount per day	How well are my sales reps closing?	Public Reports	Ishika Goyal	5/8/2024, 5:59 pm	Delete
FOLDERS	Sales Rep Win Rates	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Global Sales Reports	Ishika Goyal	27/11/2023, 7:38 pm	Add to Dashboard
All Folders	Sample Flow Report: Screen Flows	What orchestra-	Public Reports	Automated Process	22/11/2023, 10:18 pm	Favorite

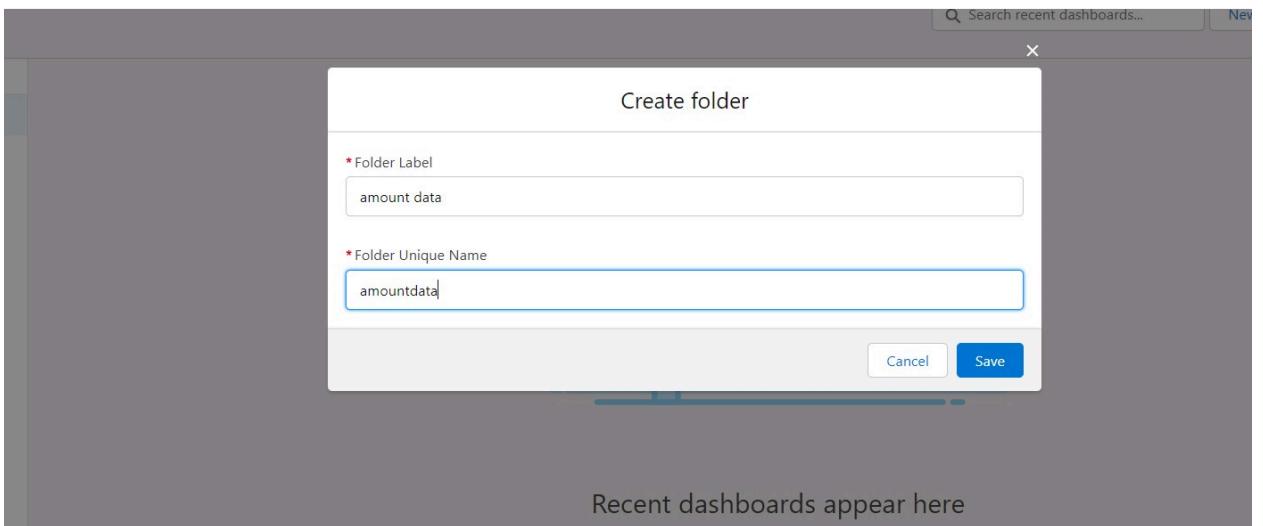
5. Select estimated rice per day folder and select folder.



Task 12: Creating Dashboard

Create Dashboard Folder

1. Click on the App launcher >> dashboard.
2. Click on the dashboard tab.
3. Click the new folder, give the folder label as “ amount data dashboard”.
4. Folder unique names will be auto populated.
5. Click save.



Create Dashboard

1. Go to the app >> click on the Dashboards tabs.
2. Give a Name and select the folder that was created, and click on create.

A screenshot of a 'Save As' dialog box. It has three main sections: 'Name' with the value 'estimated data', 'Description' with the value 'total amount of data in dashboards', and 'Folder' with the value 'amount data dashboard' and a 'Select Folder' button. At the bottom right are 'Cancel' and 'Create' buttons.

Save As	
* Name estimated data	
Description total amount of data in dashboards	
Folder amount data dashboard <input type="button" value="Select Folder"/>	
<input type="button" value="Cancel"/> <input type="button" value="Create"/>	

3. Select add component.
4. Select a Report and click on select.
5. Preview is shown below.

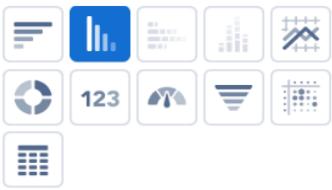
Edit Widget

Report

range of amount per day X

Use chart settings from report i

Display As



X-Axis

Rice taken by shops

Y-Axis

Sum of Amount Paid

Preview

range of amount per day



View Report (range of amount per day)

Cancel
Update

Display as>> vertical bar chart
 X-axis >> rice taken by shops
 Y-axis >> sum of amount
 Y-axis range >> automatic
 Sort by >> rice taken by shops
 Component theme >> dark.

Add the component,

1. Again select add component with above same steps
- 1.display as donut chart
- 2.sort by >> sum of amount
- 3.title>>range of amount per day
- 4.component theme dark

Click add.

Click save and done.

Edit Widget

Report

range of amount per day

Use chart settings from report i

Display As

Value

Sum of Amount Paid

Sliced By

Rice taken by shops

Preview

range of amount per day

Sum of Amount Paid

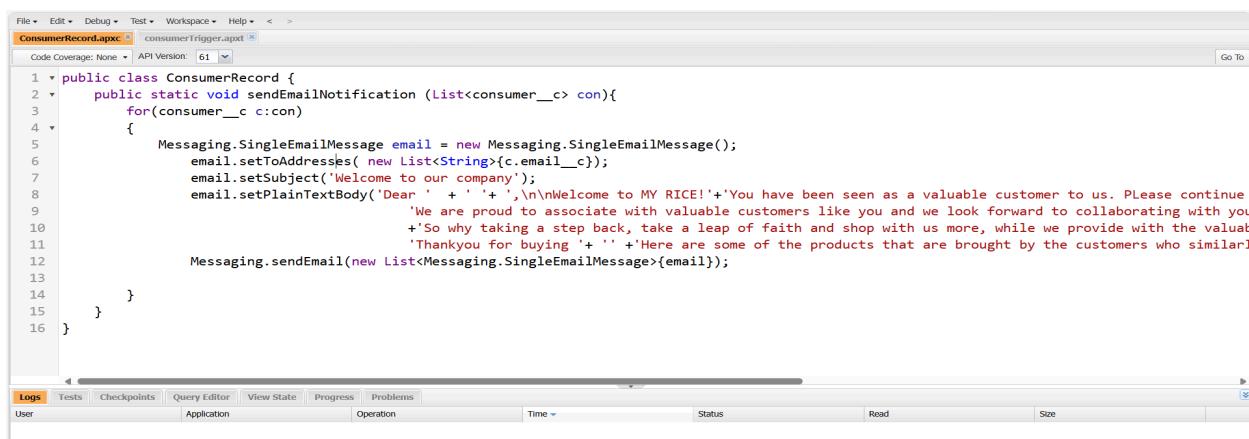
Rice taken by shops

View Report (range of amount per day)

Task 13: Apex

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.



```
File Edit Debug Test Workspace Help < >
ConsumerRecord.apxc consumerTrigger.apxt Go To
Code Coverage: None API Version: 61
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 similarl
12 *             Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
13 *
14 *         }
15 *     }
16 }
```

The screenshot shows the Salesforce Developer Console interface. The top navigation bar includes File, Edit, Debug, Test, Workspace, Help, and a Go To button. Below the navigation bar, there are tabs for Code Coverage (None), API Version (61), and a dropdown menu. The main area displays the code for the ConsumerRecord class. The code defines a static method sendEmailNotification that takes a list of consumer__c objects and sends an email to each one. The email message is constructed with a subject and a plain text body containing a welcome message and product information. The bottom of the screen shows a toolbar with tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems, along with application status indicators for User, Application, Operation, Time, Status, Read, and Size.

Creating an Apex Trigger

1. Click on developer console and you will be navigated to a new console window.
2. Click on the File menu in the toolbar, and click on new >> Trigger.
3. Enter the trigger name and the object to be triggered.



```
File Edit Debug Test Workspace Help < >
ConsumerRecord.apxc consumerTrigger.apxt Go To
Code Coverage: None API Version: 61
1 * trigger consumerTrigger on consumer__c (After insert) {
2 *     if(trigger.isAfter && trigger.isInsert) {
3 *         ConsumerRecord.sendEmailNotification(trigger.new);
4 *     }
5 }
```

The screenshot shows the Salesforce Developer Console interface, similar to the previous one but with a different tab selected. The top navigation bar includes File, Edit, Debug, Test, Workspace, Help, and a Go To button. Below the navigation bar, there are tabs for Code Coverage (None), API Version (61), and a dropdown menu. The main area displays the code for the consumerTrigger trigger. The trigger is defined on the consumer__c object and fires after an insert. It calls the sendEmailNotification method of the ConsumerRecord class on the newly inserted records. The bottom of the screen shows a toolbar with tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems, along with application status indicators for User, Application, Operation, Time, Status, Read, and Size.

Thank you