A CRM APPLICATION FOR WHOLESALE RICE MILL

A detailed document of my project

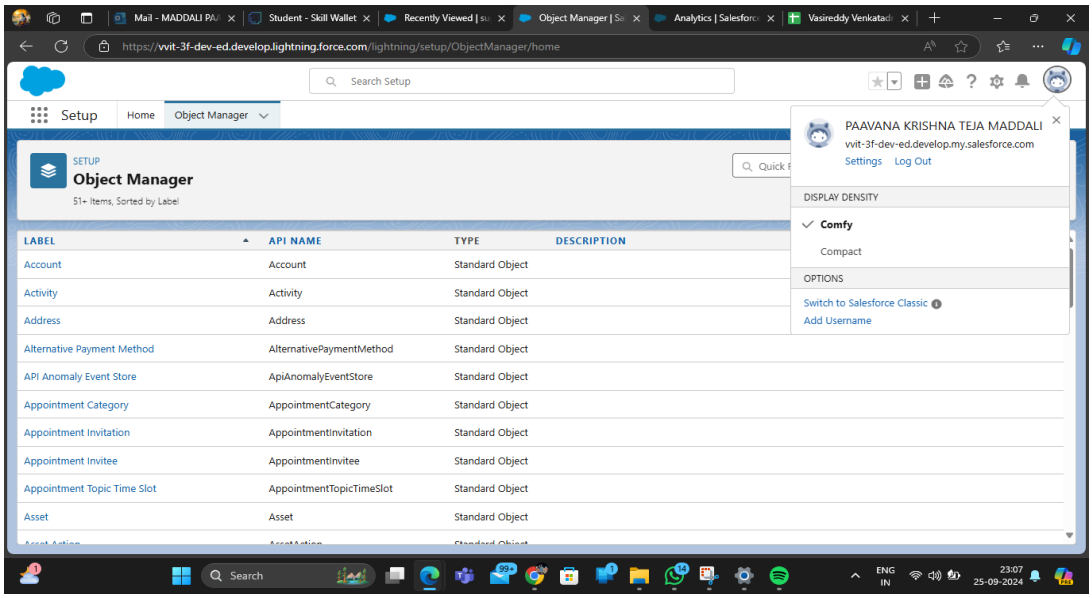
Prepared by

Maddali paavana krishna teja

Vasireddy Venkatadri institute of technology

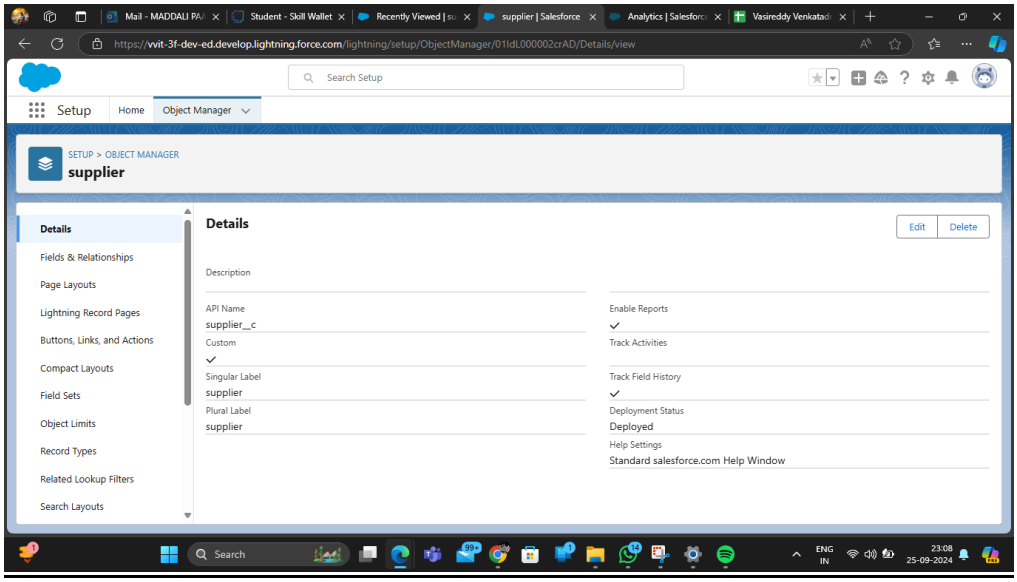
Introduction:

1.Developer Account Creation and Activation



2.Object Creation

creating objects of supplier, Consumer, rice mill and rice details.


Setup
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Object Manager
SETUP > OBJECT MANAGER
supplier
Details
Edit
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Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
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Enable Reports
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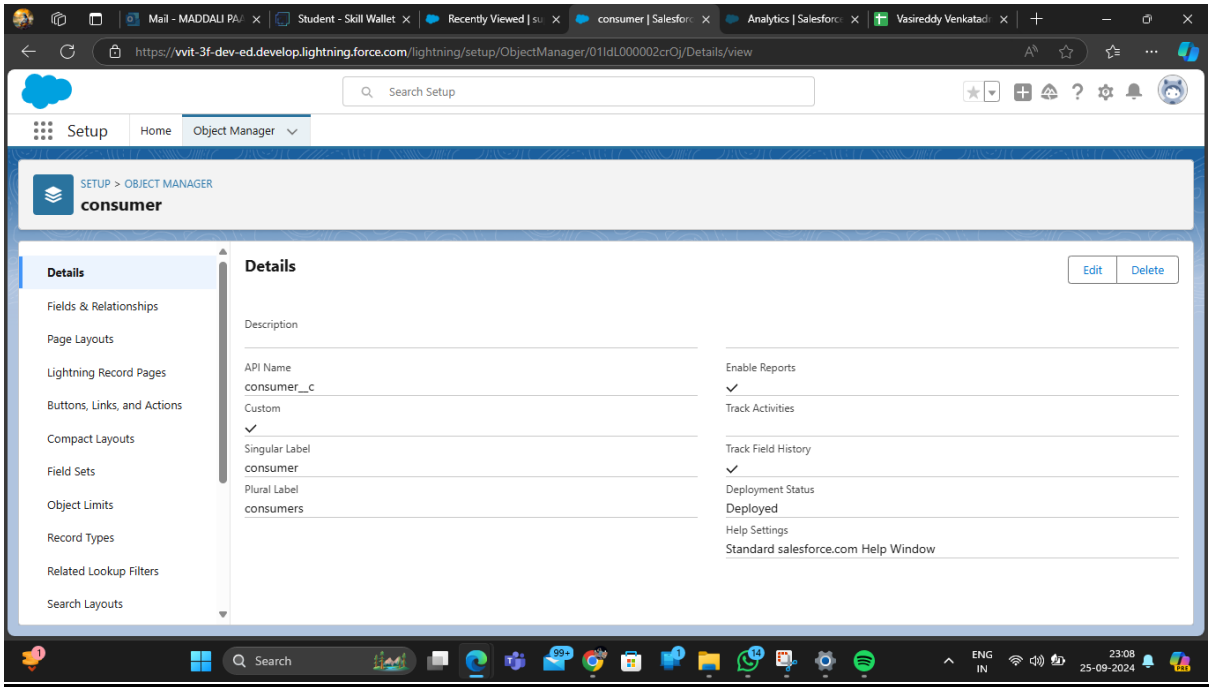
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Object Limits
Record Types
Related Lookup Filters
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consumers
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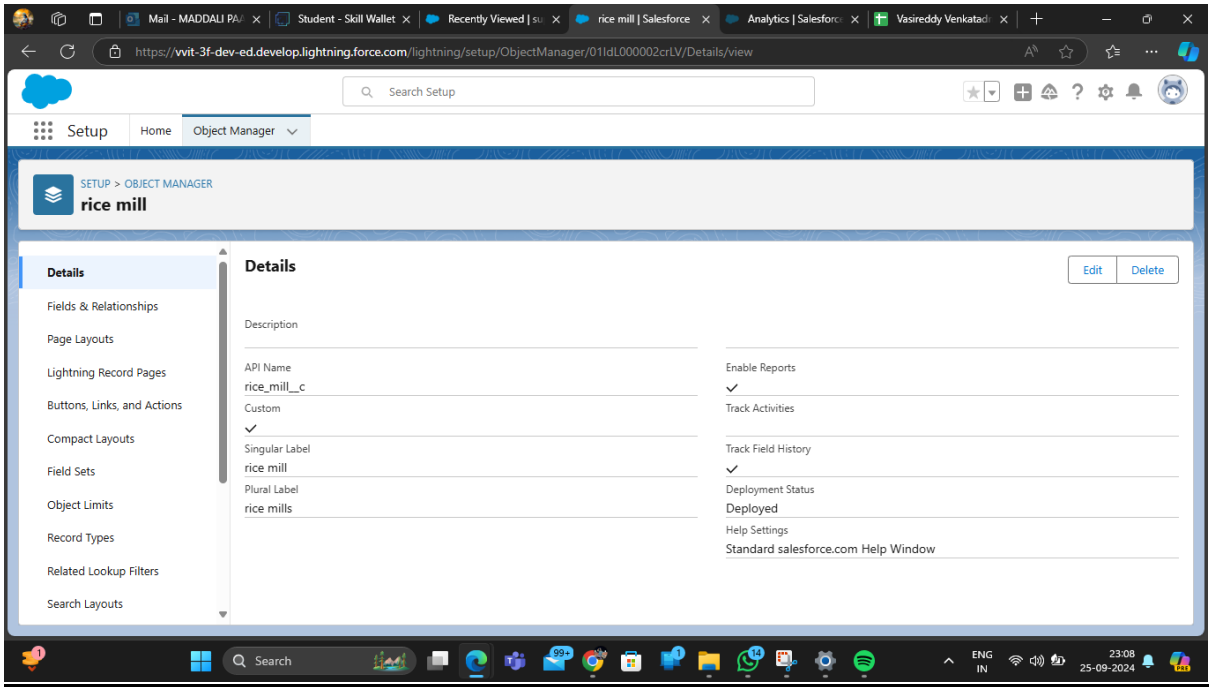
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Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
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Plural Label
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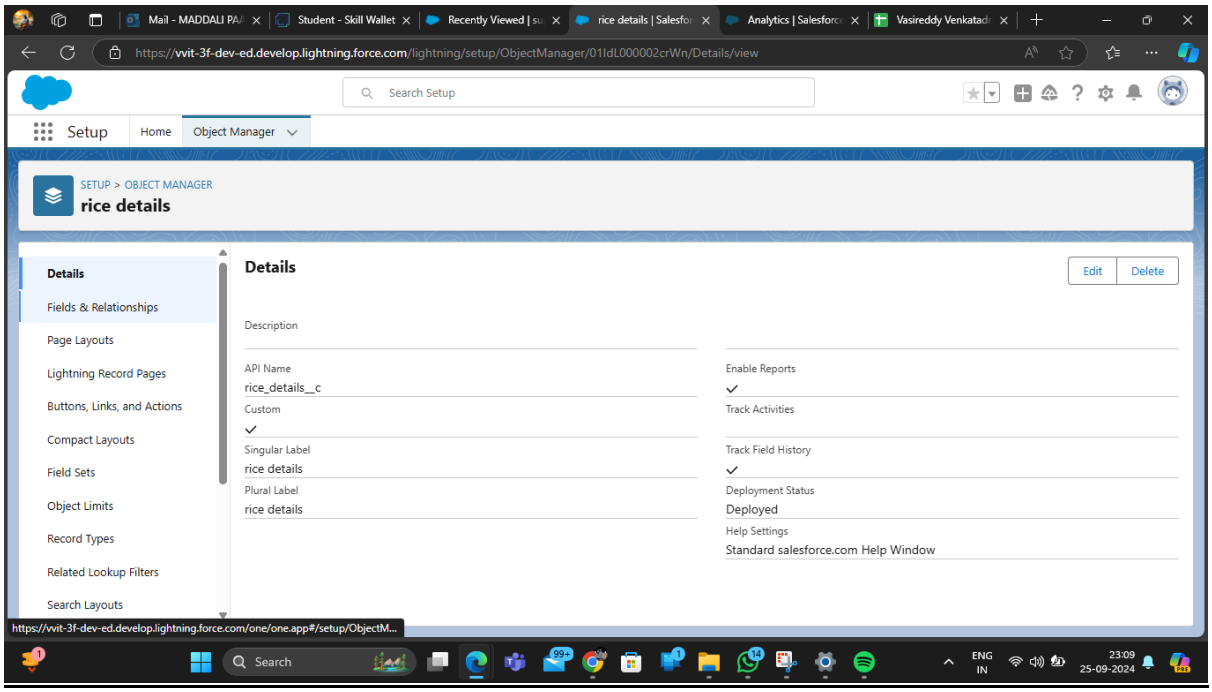
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Page Layouts
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Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
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Track Activities
Track Field History
Deployment Status
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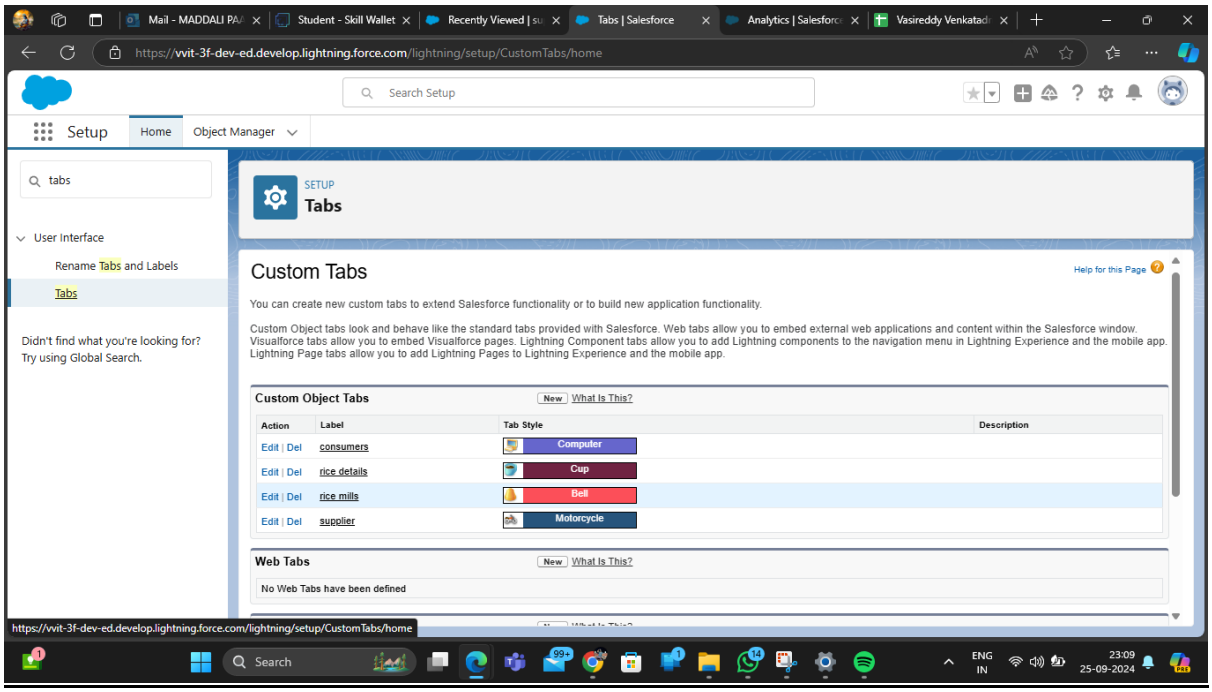
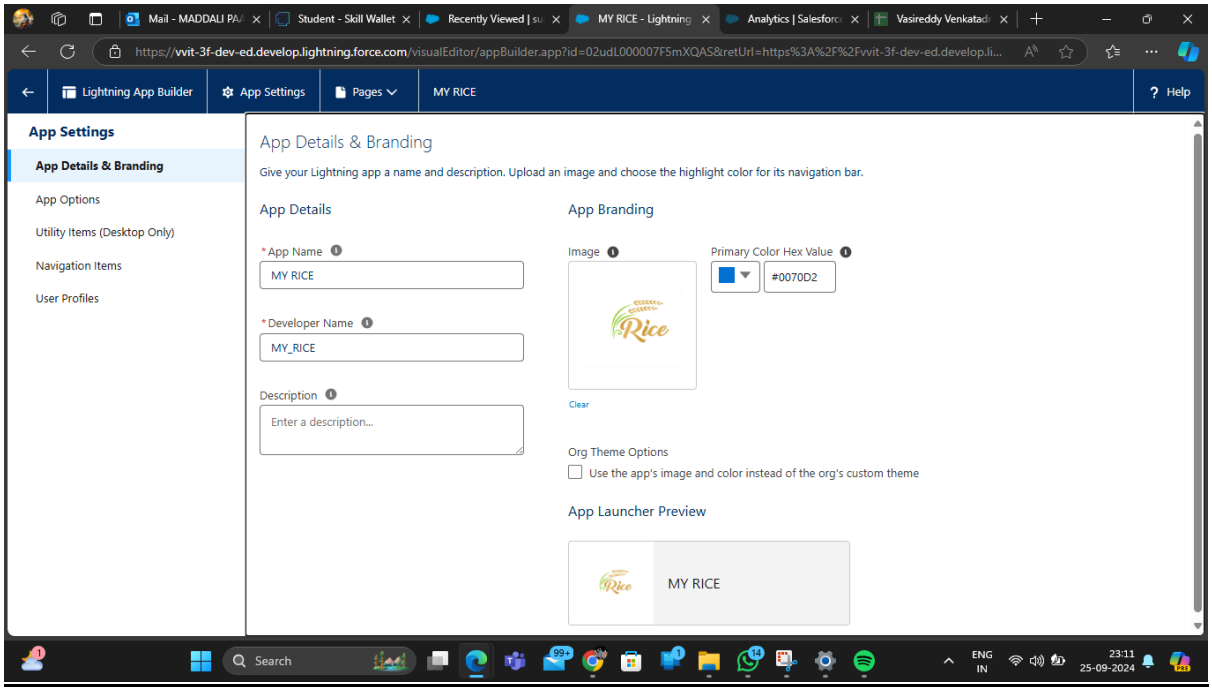
3.Creating of tabs& Lighting app for CRM Application:





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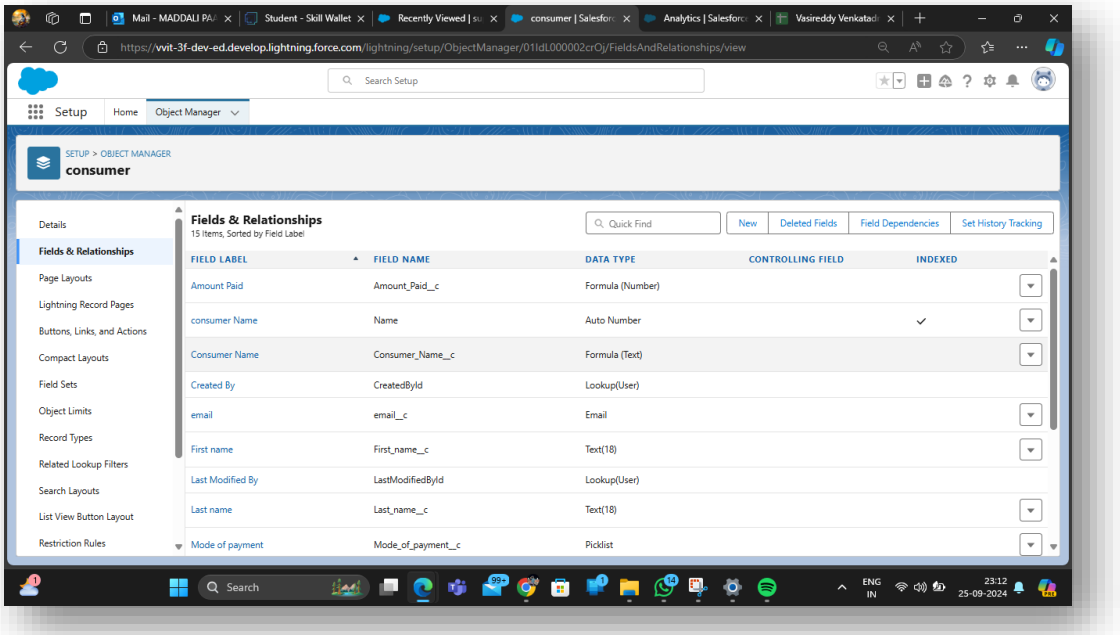

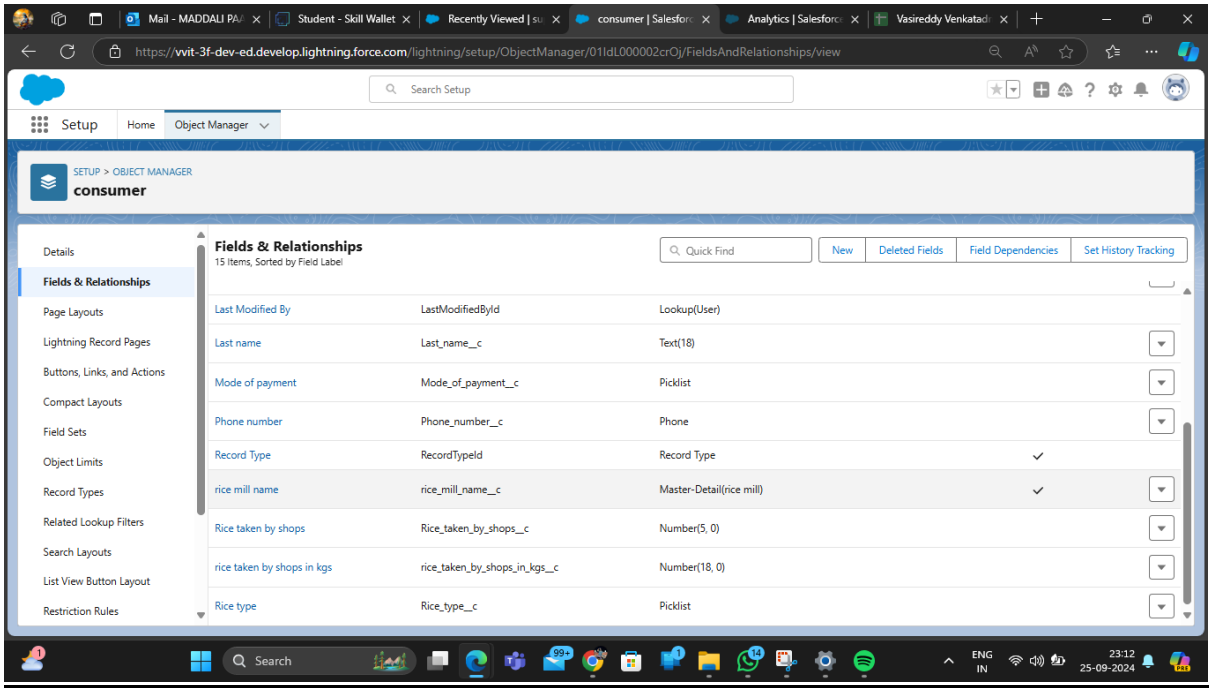

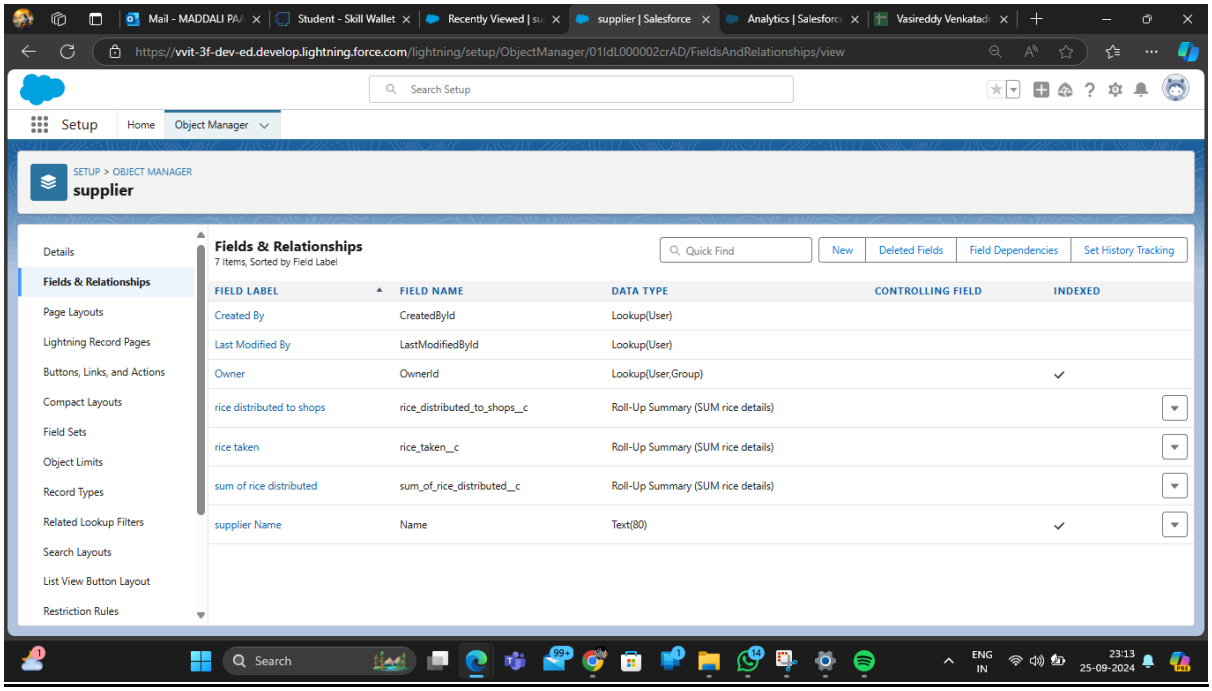
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Analytics | Salesforc
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Details
Fields & Relationships
Page Layouts
Lightning Record Pages
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Compact Layouts
Field Sets
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Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Fields & Relationships
7 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
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 taken
rice_taken__c
Roll-Up Summary (SUM rice details)
sum of rice distributed
sum_of_rice_distributed__c
Roll-Up Summary (SUM rice details)
supplier Name
Name
Text(80)
Search
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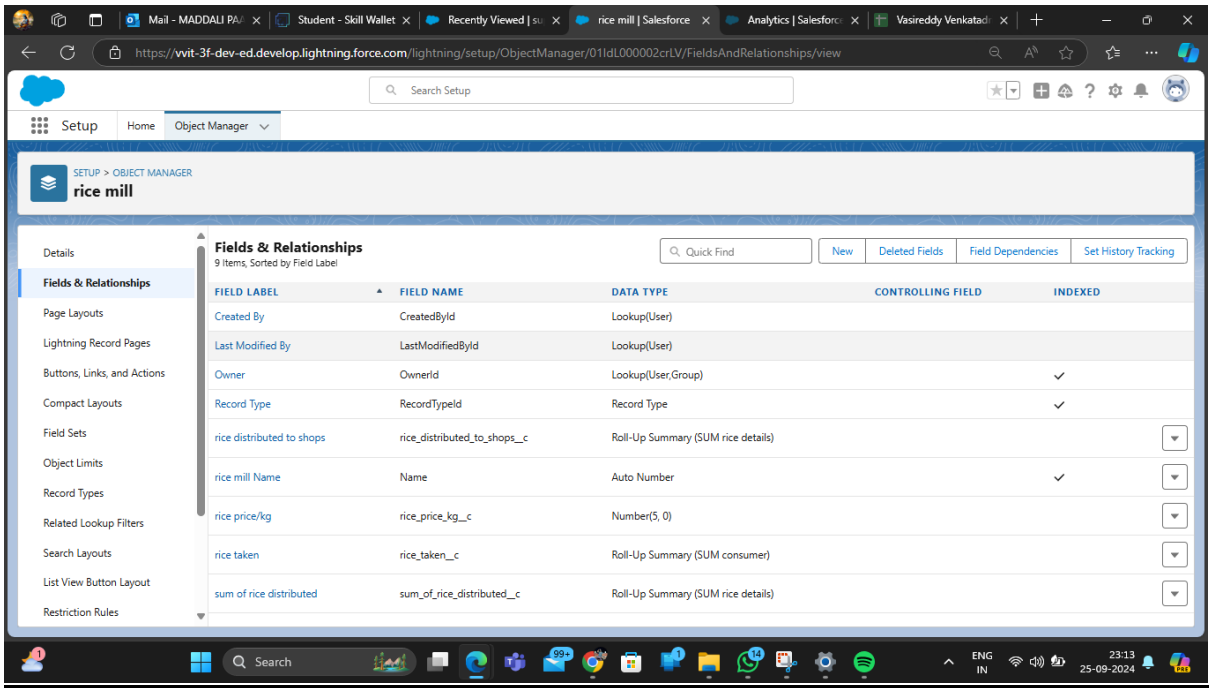
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Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Fields & Relationships
9 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
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)
Record Type
RecordTypeId
Record Type
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)
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Roll-Up Summary (SUM rice details)
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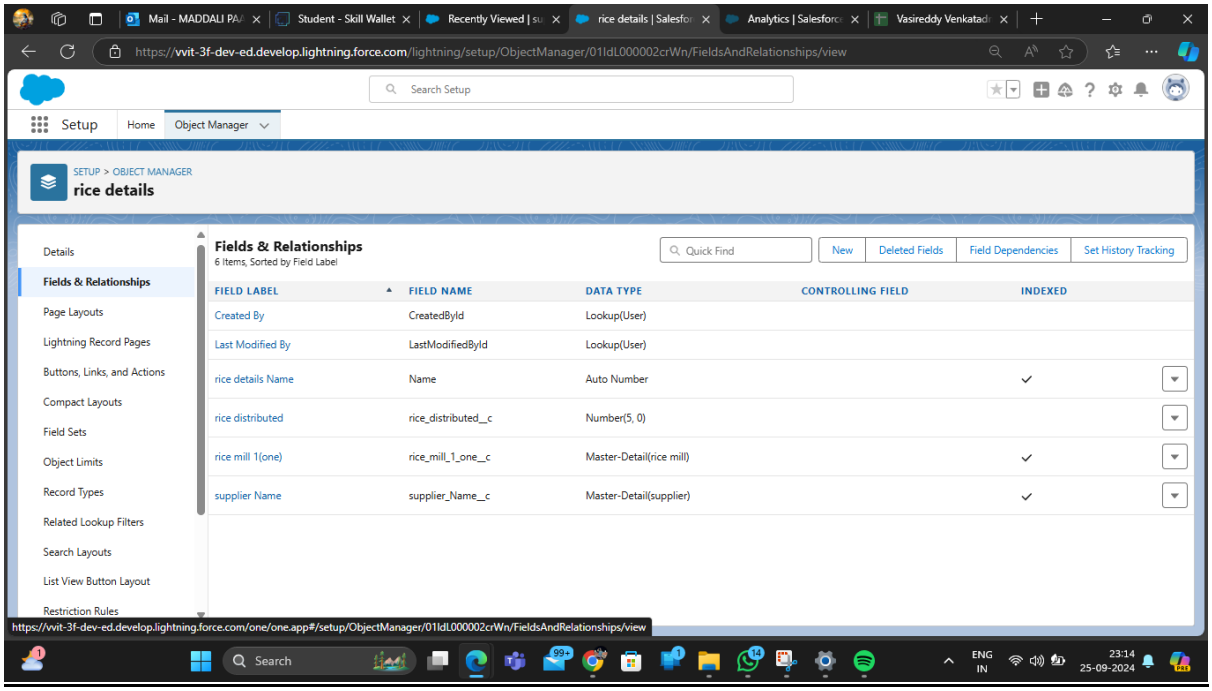

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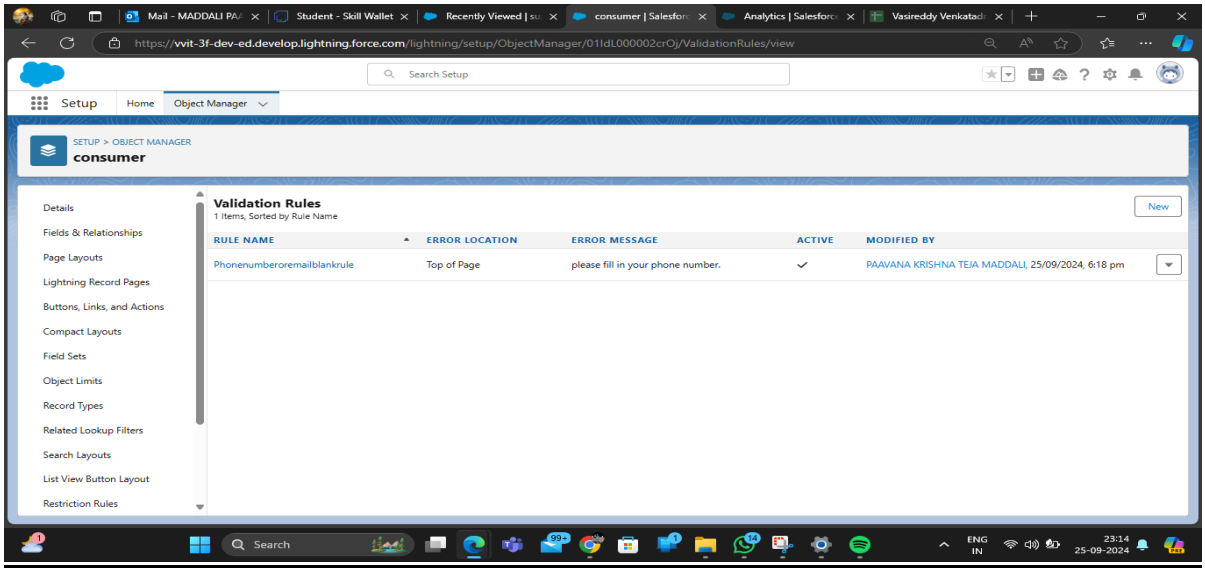
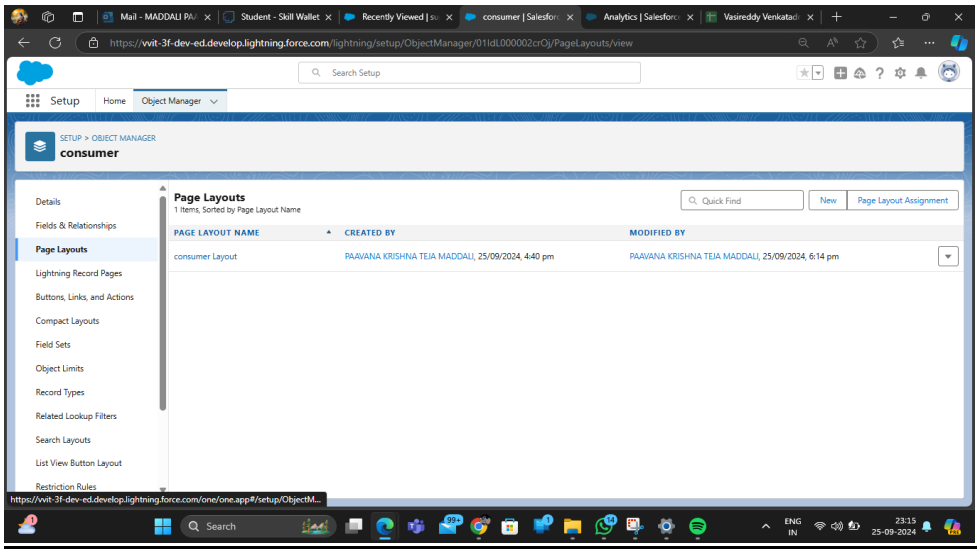


6.page Layout



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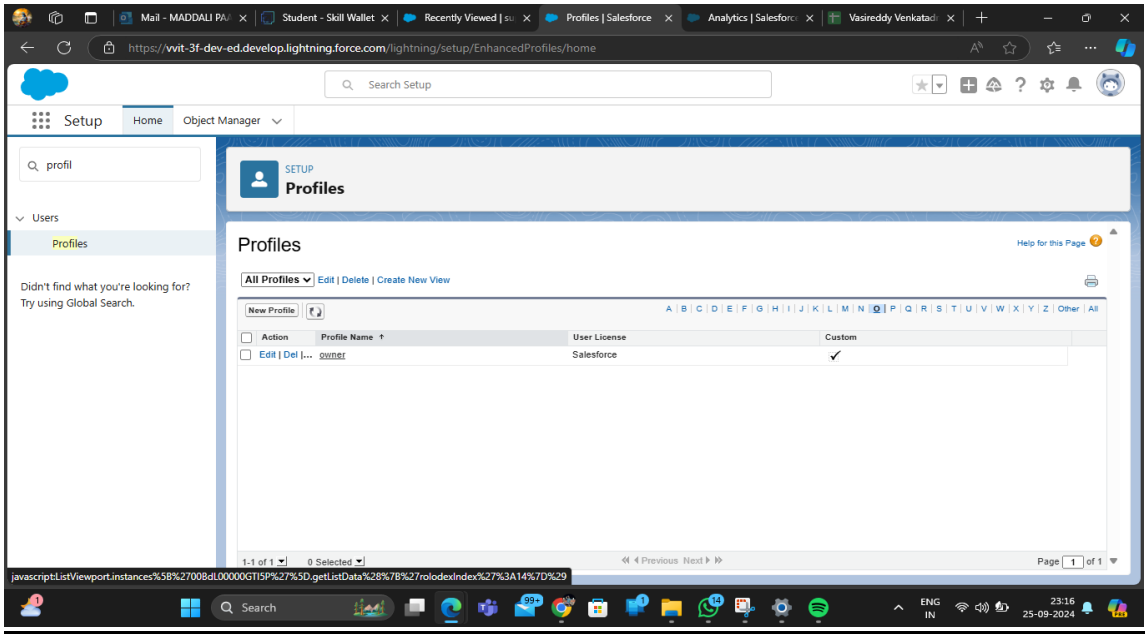
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Student - Skill Wallet
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Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Profiles
Help for this Page
All Profiles
Edit | Delete | Create New View
New Profile
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
Action
Profile Name
User License
Custom
Edit | Del |...
owner
Salesforce
1-1 of 1
0 Selected
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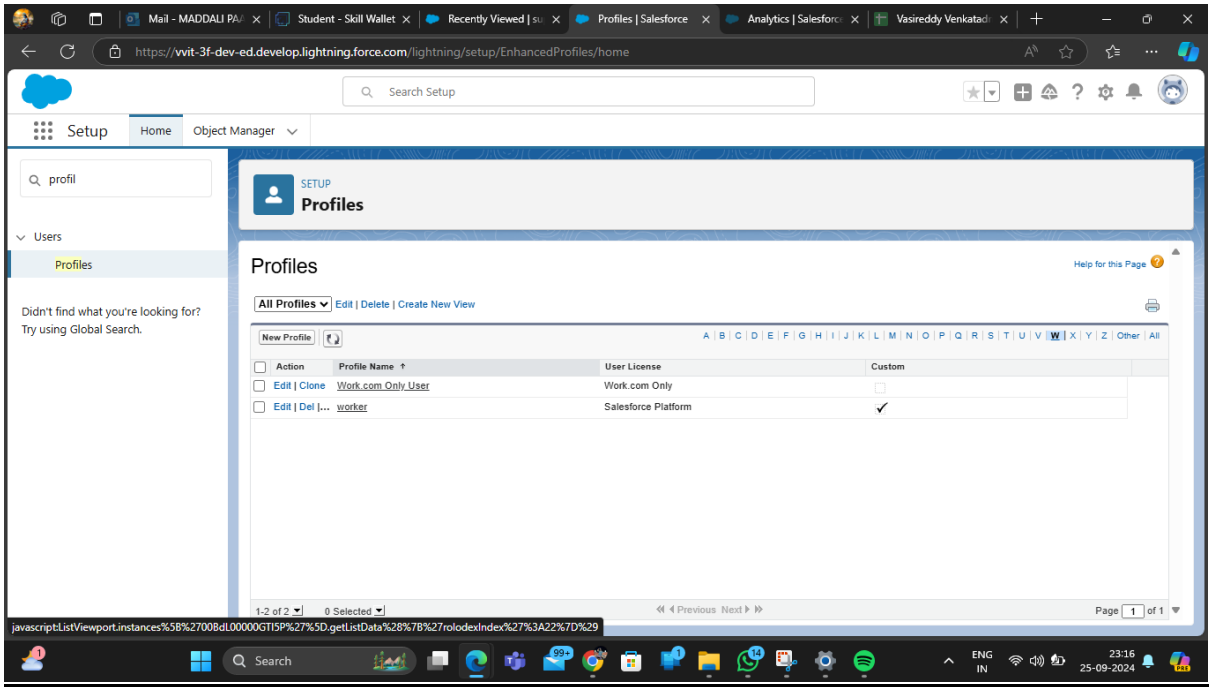
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Search Setup
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Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Profiles
Help for this Page
All Profiles
Edit | Delete | Create New View
New Profile
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
Action
Profile Name
User License
Custom
Edit | Clone
Work.com Only User
Work.com Only
Edit | Del |...
worker
Salesforce Platform
1-2 of 2
0 Selected
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Next
Page 1 of 1
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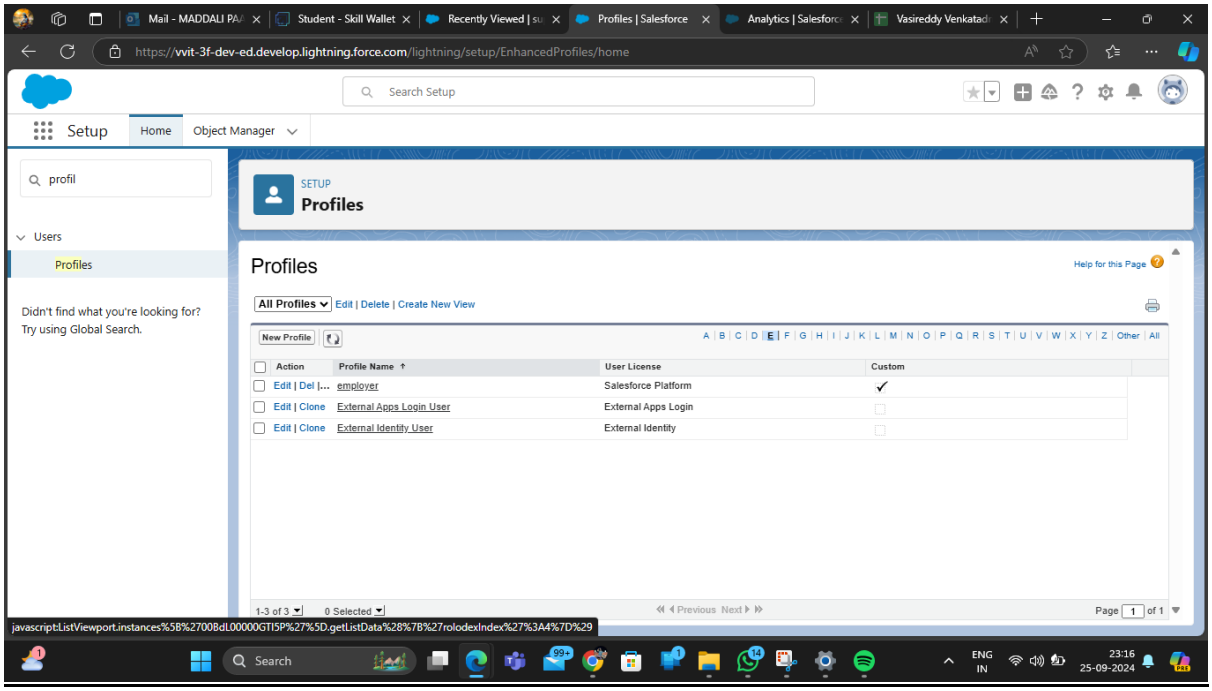
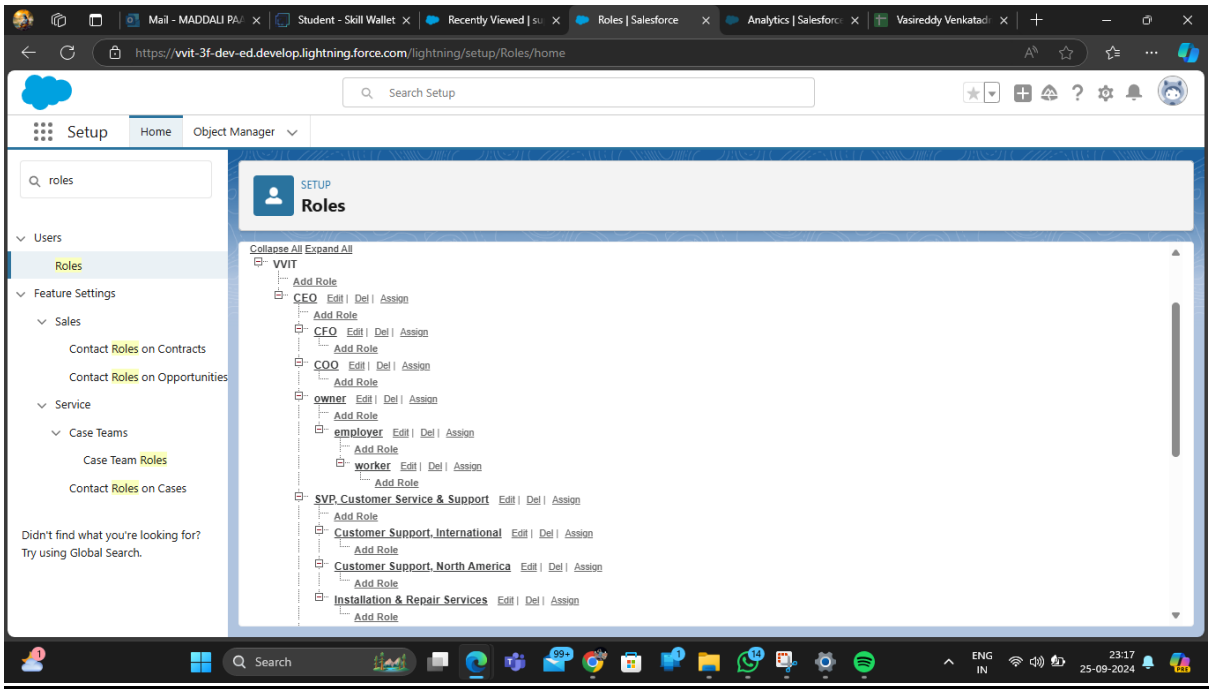


8.Roles



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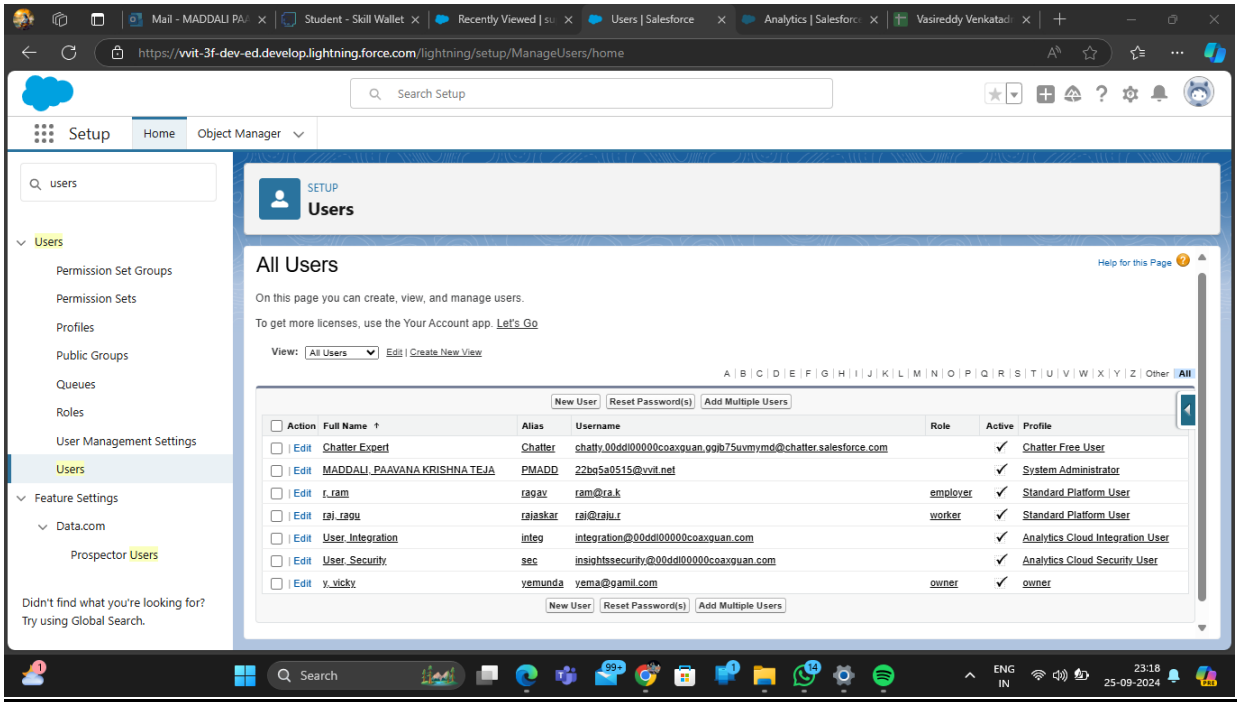

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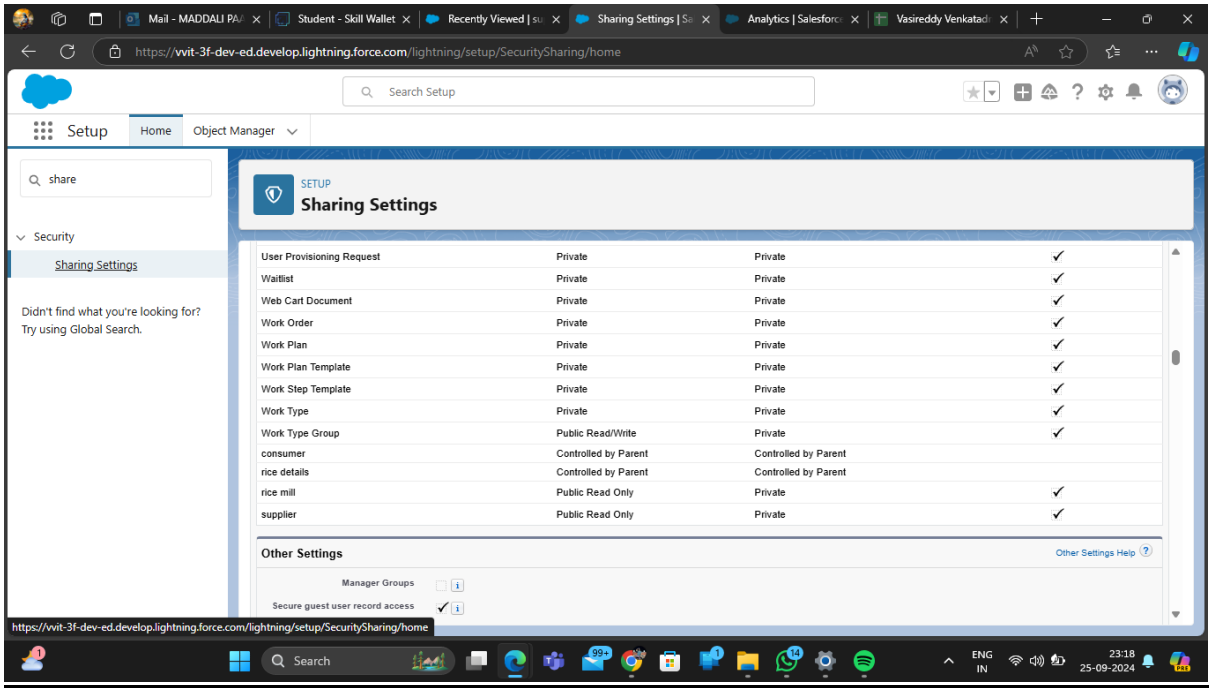

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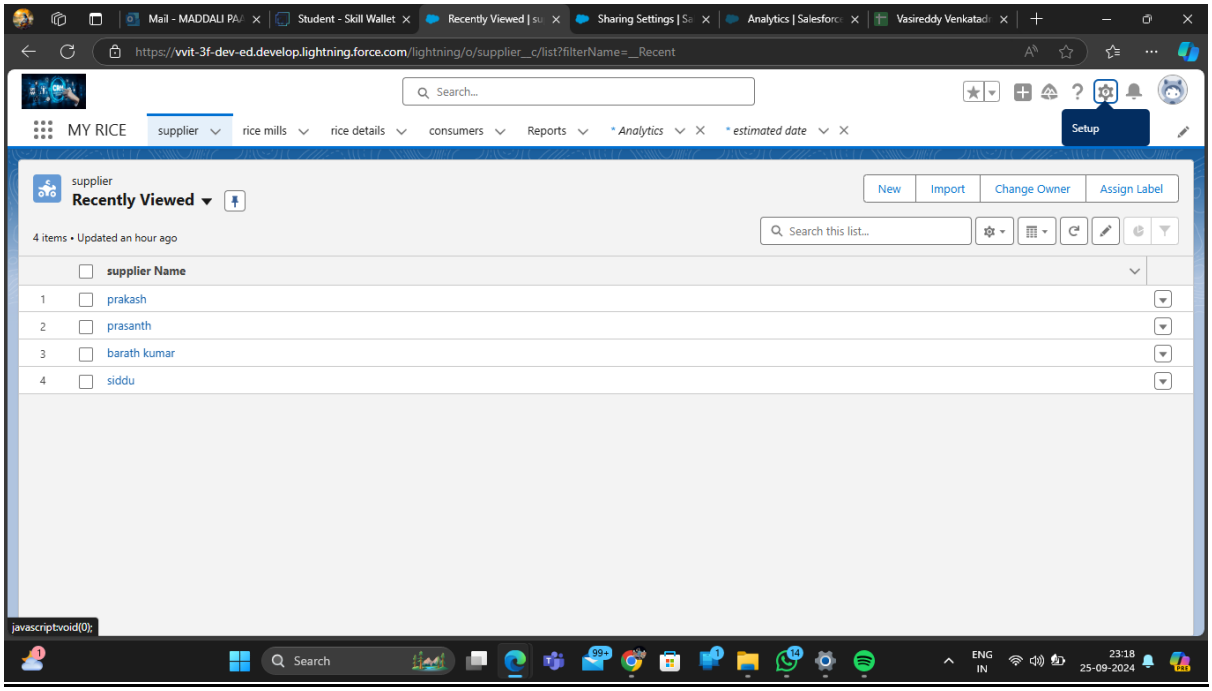
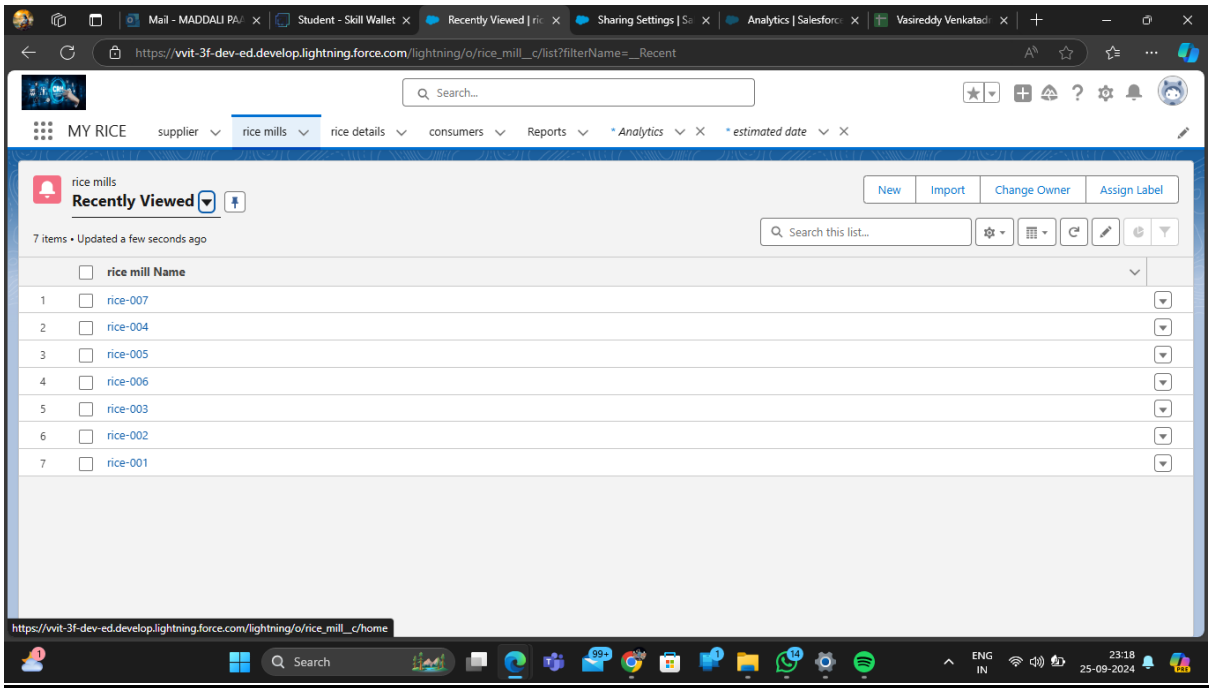

MY RICE
supplier
rice mills
rice details
consumers
Reports
* Analytics
* estimated date
Setup
supplier
Recently Viewed
New
Import
Change Owner
Assign Label
4 items • Updated an hour ago
Search this list...
supplier Name
1 prakash
2 prasanth
3 barath kumar
4 siddu
javascript:void(0);


MY RICE
supplier
rice mills
rice details
consumers
Reports
* Analytics
* estimated date
rice mills
Recently Viewed
New
Import
Change Owner
Assign Label
7 items • Updated a few seconds ago
Search this list...
rice mill Name
1 rice-007
2 rice-004
3 rice-005
4 rice-006
5 rice-003
6 rice-002
7 rice-001
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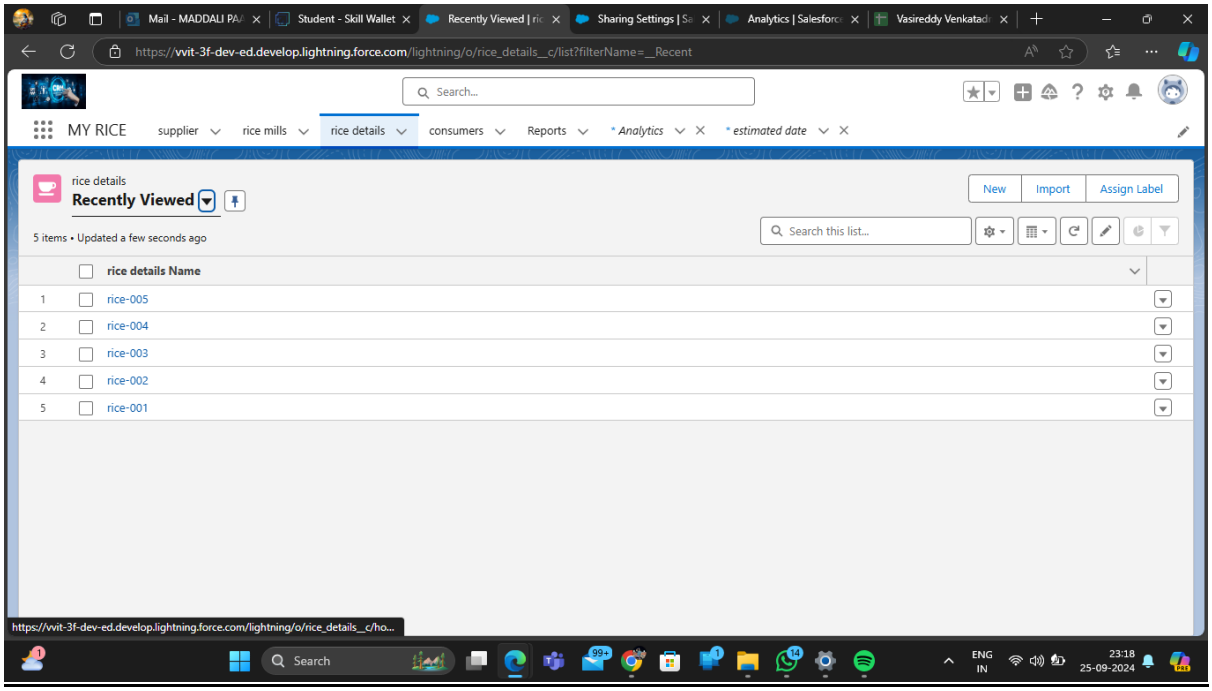
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Search...
MY RICE
supplier
rice mills
rice details
consumers
Reports
* Analytics
* estimated date
rice details
Recently Viewed
5 items • Updated a few seconds ago
New
Import
Assign Label
Search this list...
rice details Name
1 rice-005
2 rice-004
3 rice-003
4 rice-002
5 rice-001
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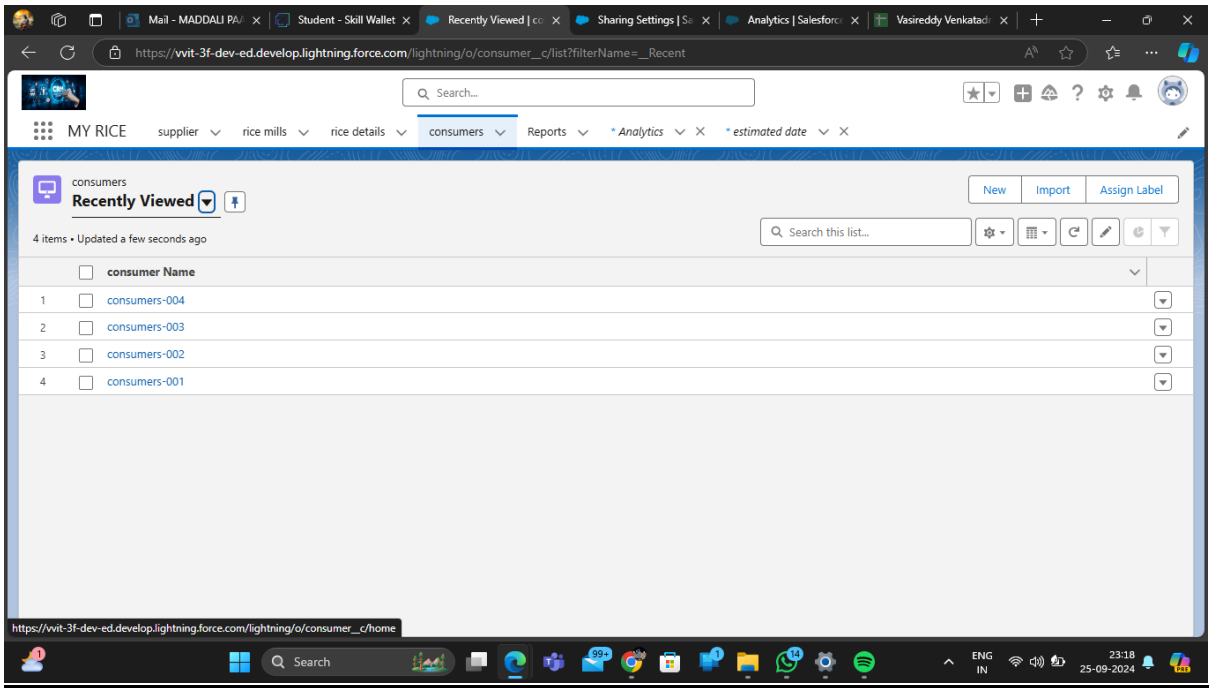
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Search...
MY RICE
supplier
rice mills
rice details
consumers
Reports
* Analytics
* estimated date
consumers
Recently Viewed
4 items • Updated a few seconds ago
New
Import
Assign Label
Search this list...
consumer Name
1 consumers-004
2 consumers-003
3 consumers-002
4 consumers-001
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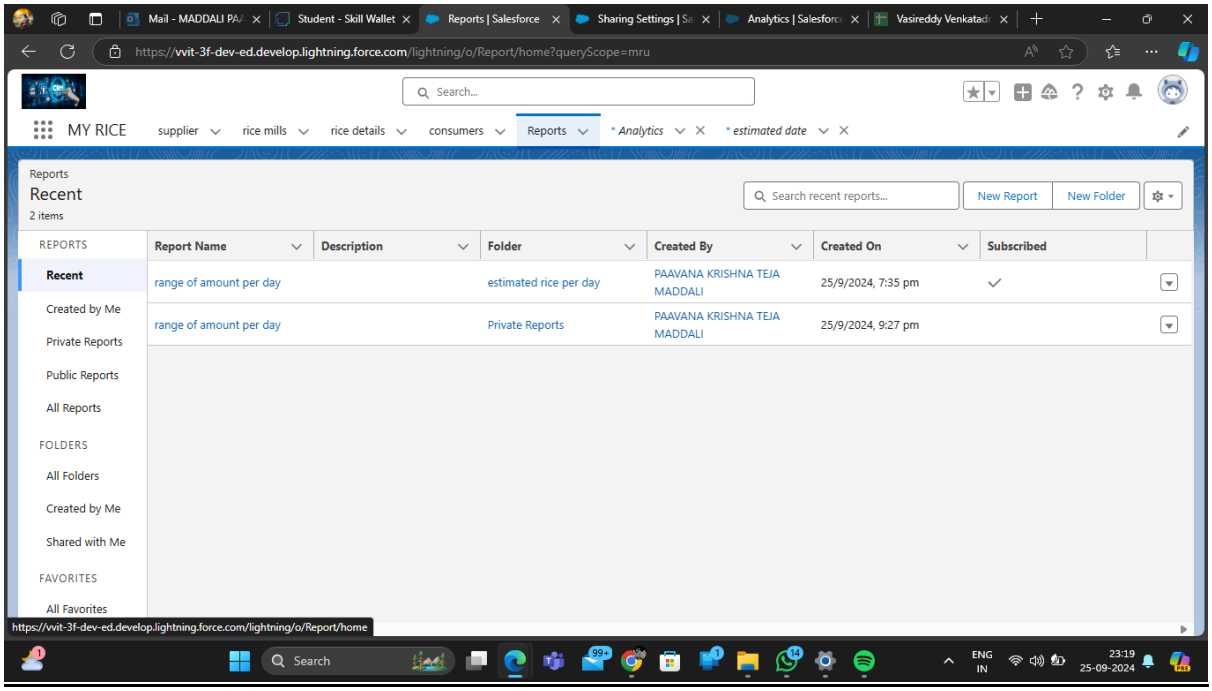
MY RICE
supplier
rice mills
rice details
consumers
Reports
* Analytics
* estimated date
Reports
Recent
2 items
Search recent reports...
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Report Name
Description
Folder
Created By
Created On
Subscribed
range of amount per day
estimated rice per day
PAAVANA KRISHNA TEJA MADDALI
25/9/2024, 7:35 pm
range of amount per day
Private Reports
PAAVANA KRISHNA TEJA MADDALI
25/9/2024, 9:27 pm
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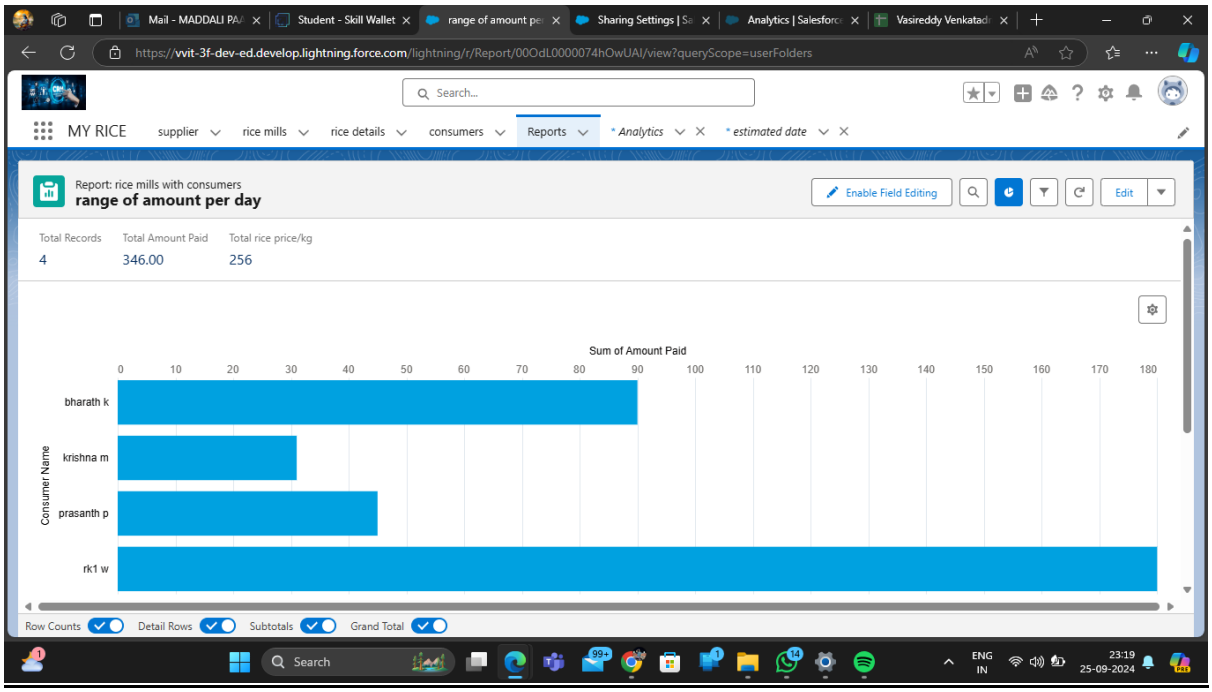
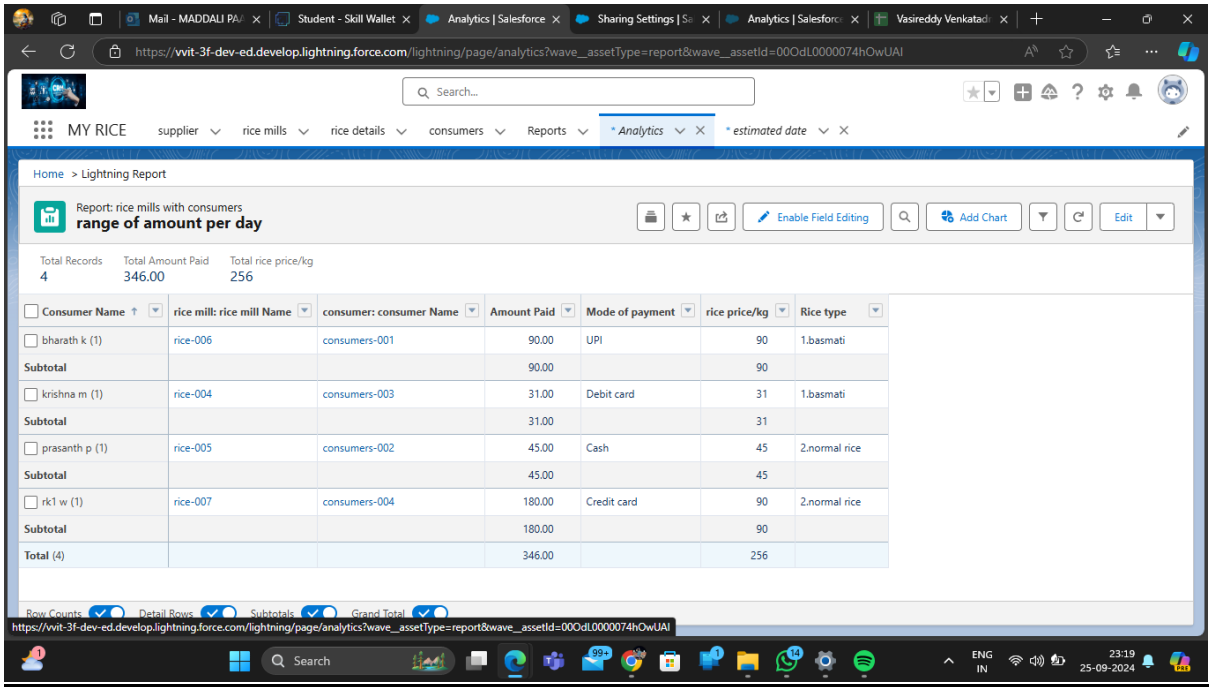

MY RICE
supplier
rice mills
rice details
consumers
Reports
* Analytics
* estimated date
Report: rice mills with consumers
range of amount per day
Enable Field Editing
Edit
Total Records
4
Total Amount Paid
346.00
Total rice price/kg
256
Sum of Amount Paid
0
10
20
30
40
50
60
70
80
90
100
110
120
130
140
150
160
170
180
Consumer Name
bharath k
krishna m
prasanth p
rk1 w
Row Counts
Detail Rows
Subtotals
Grand Total


MY RICE
supplier
rice mills
rice details
consumers
Reports
* Analytics
* estimated date
Home > Lightning Report
Report: rice mills with consumers
range of amount per day
Enable Field Editing
Add Chart
Edit
Total Records
4
Total Amount Paid
346.00
Total rice price/kg
256
Consumer Name
rice mill: rice mill Name
consumer: consumer Name
Amount Paid
Mode of payment
rice price/kg
Rice type
bharath k (1)
rice-006
consumers-001
90.00
UPI
90
1.basmati
Subtotal
90.00
90
krishna m (1)
rice-004
consumers-003
31.00
Debit card
31
1.basmati
Subtotal
31.00
31
prasanth p (1)
rice-005
consumers-002
45.00
Cash
45
2.normal rice
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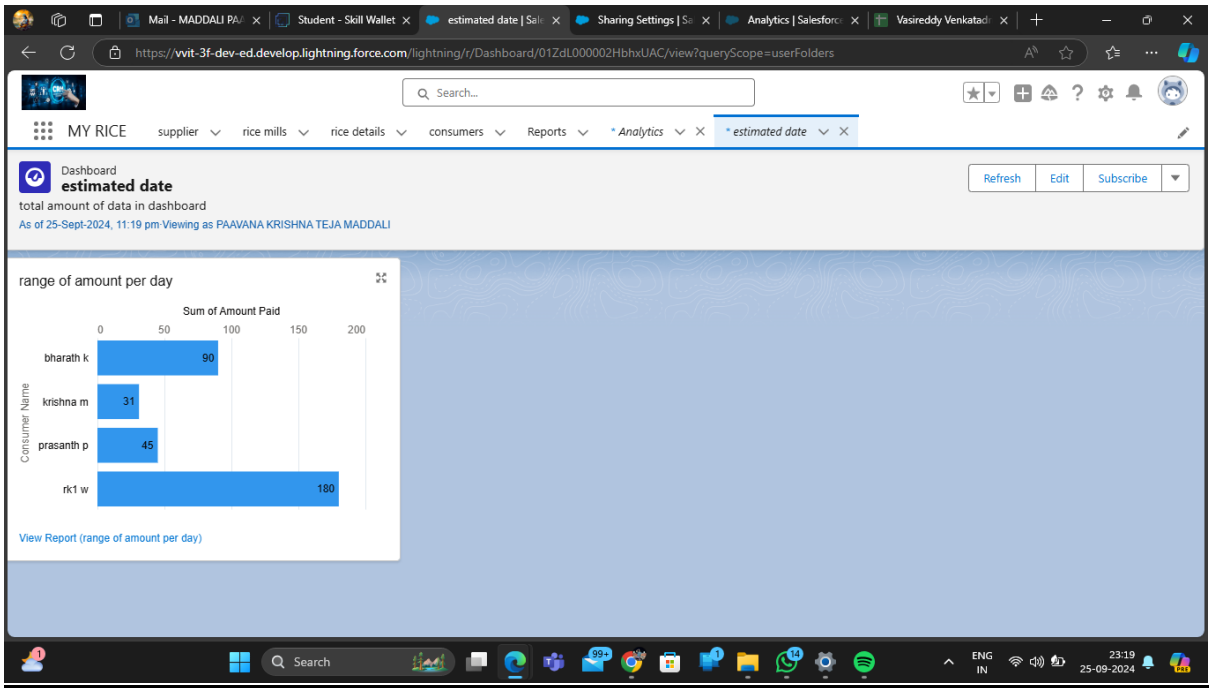
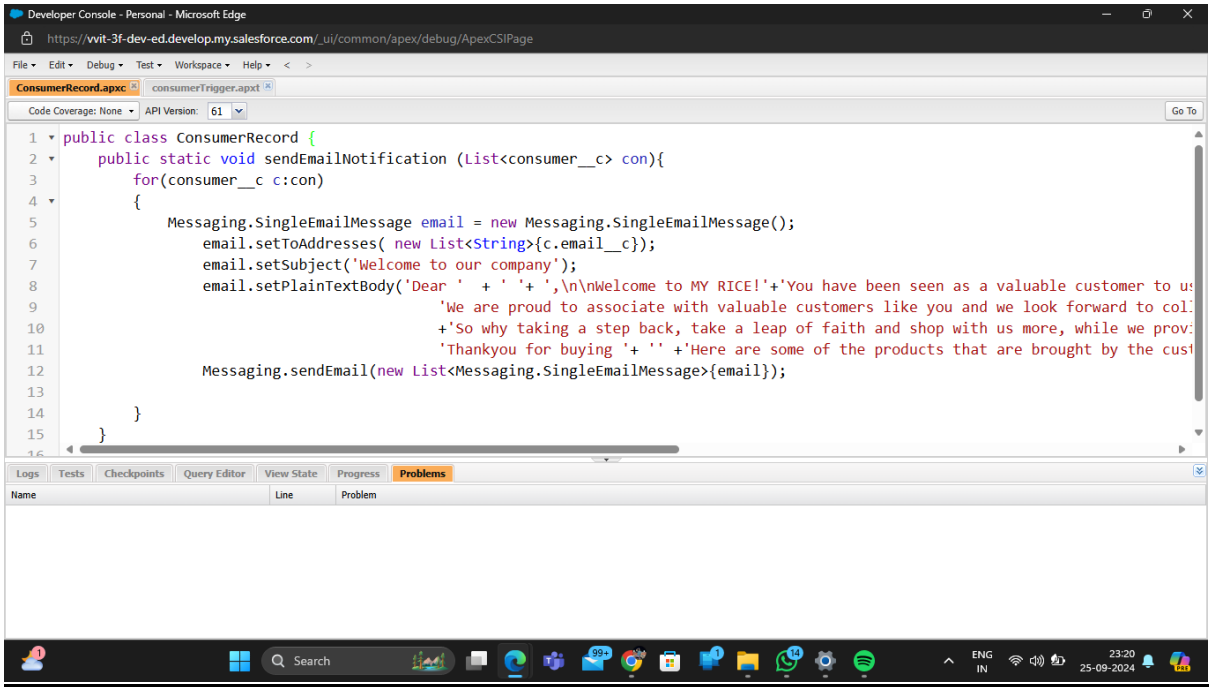
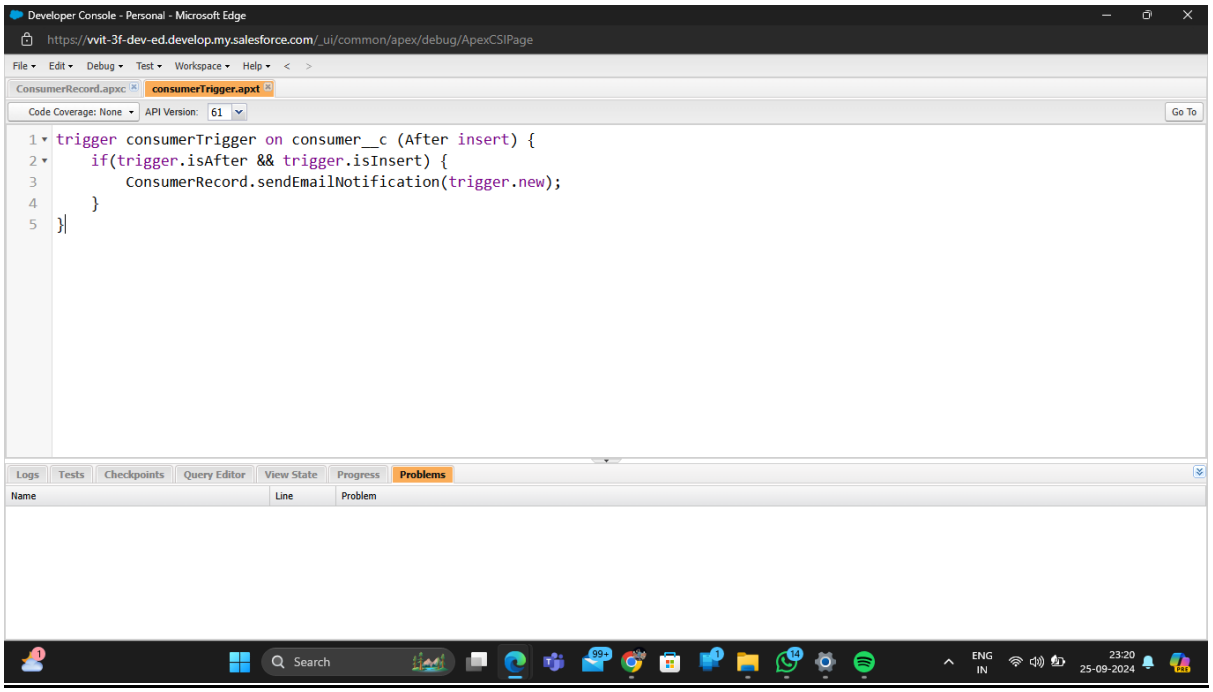
45
rk1 w (1)
rice-007
consumers-004
180.00
Credit card
90
2.normal rice
Subtotal
180.00
90
Total (4)
346.00
256
Row Counts
Detail Rows
Subtotals
Grand Total
https://vvit-3f-dev-ed.develop.lightning.force.com/lightning/page/analytics?wave__assetType=report&wave__assetId=00OdL0000074hOwUAI


MY RICE
supplier
rice mills
rice details
consumers
Reports
* Analytics
* estimated date
Dashboard
estimated date
total amount of data in dashboard
As of 25-Sept-2024, 11:19 pm·Viewing as PAAVANA KRISHNA TEJA MADDALI
Refresh
Edit
Subscribe
range of amount per day
Sum of Amount Paid
0
50
100
150
200
bharath k
90
krishna m
31
prasanth p
45
rk1 w
180
Consumer Name
View Report (range of amount per day)


Developer Console - Personal - Microsoft Edge
https://vvit-3f-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File Edit Debug Test Workspace Help
ConsumerRecord.apxc
consumerTrigger.apxt
Code Coverage: None
API Version: 61
Go To
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
'We are proud to associate with valuable customers like you and we look forward to coll
+'So why taking a step back, take a leap of faith and shop with us more, while we provi
'Thankyou for buying '+ '' +'Here are some of the products that are brought by the cust
Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
}
}
Logs Tests Checkpoints Query Editor View State Progress Problems
Name Line Problem
Search
ENG IN
23:20 25-09-2024


Developer Console - Personal - Microsoft Edge
https://vvit-3f-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File Edit Debug Test Workspace Help
ConsumerRecord.apxc
consumerTrigger.apxt
Code Coverage: None
API Version: 61
Go To
trigger consumerTrigger on consumer__c (After insert) {
if(trigger.isAfter && trigger.isInsert) {
ConsumerRecord.sendEmailNotification(trigger.new);
}
}
Logs Tests Checkpoints Query Editor View State Progress Problems
Name Line Problem
Search
ENG IN
23:20 25-09-2024