# CRM Application for Wholesale Rice Mill



project By,

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# Salesforce Developer Setup Guide

## 1. Creating a Developer Account

1. **Sign Up for Developer Account:**
   - Visit Salesforce Developer Sign-Up Page.
   - Fill in the following details:
     - **First Name & Last Name**: [Your Name]
     - **Email**: [Your Email]
     - **Role**: Developer
     - **Company**: [Your College Name]
     - **Country**: India
     - **Postal Code**: [Your PIN Code]
     - **Username**: A combination of your name and company, e.g., `yourname@yourcollege.com`
   - Click on **Sign Me Up**.
2. **Activate Your Account:**

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- Check your email inbox for an activation email from Salesforce.
- Click on **Verify Account**.
- Set a new password and answer a security question, then click **Change Password**.
- You will be redirected to your Salesforce setup page.

## 2. Creating Custom Objects

1. **Create Supplier Object:**
   - Navigate to **Object Manager** from the setup page.
   - Click **Create** > **Custom Object**.
   - Enter the following:
     - **Label Name**: Supplier
     - **Plural Label Name**: Suppliers
     - **Record Name**: Supplier Name (Data Type: Text)
   - Check **Allow Reports**, **Track Field History**, and **Allow Search**.
   - Click **Save**.
2. **Create Rice Mill Object:**
   - Navigate to **Object Manager**.
   - Click **Create** > **Custom Object**.
   - Enter the following:
     - **Label Name**: Rice Mill
     - **Plural Label Name**: Rice Mills
     - **Record Name**: Auto Number
     - **Display Format**: rice-{000}
     - **Starting Number**: 1
   - Check **Allow Reports**, **Track Field History**, **Allow Search**.
   - Click **Save**.
3. **Create Consumer Object:**
   - Follow the same steps as above with the following details:
     - **Label Name**: Consumer
     - **Plural Label Name**: Consumers
     - **Display Format**: consumers-{000}
     - **Starting Number**: 1
4. **Create Rice Details Object:**

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- Follow the same steps as above with the following details:
    - **Label Name**: Rice Details
    - **Plural Label Name**: Rice Details
    - **Display Format**: rice-{000}
    - **Starting Number**: 1

## 3. Creating Custom Tabs

1. **Create a Tab for Supplier Object:**
    - Go to the setup page.
    - Type **Tabs** in the Quick Find box.
    - Click **Tabs** > **New** (under Custom Object Tabs).
    - Select **Supplier** and choose a tab style.
    - Click **Next** (default profiles page) > **Next** (Add to Custom App) > **Uncheck** include tab.
    - Ensure **Append tab to users' existing personal customizations** is checked.
    - Click **Save**.
2. **Create Tabs for Remaining Objects:**
    - Follow the same steps as above for **Rice Mill**, **Consumer**, and **Rice Details** objects.

## 4. Creating a Lightning App

1. **Create Lightning App:**
    - Go to the setup page.
    - Search for **App Manager** and select it.
    - Click **New Lightning App**.
    - Enter the app name as **MY RICE** and click **Next**.
    - Keep default settings on the App Options and Utility Items pages, then click **Next**.
    - Upload a related photo for the app.
    - Add Navigation Items: **Supplier**, **Rice Mill**, **Consumer**, **Rice Details**.
    - Click **Next**.
    - Add the **System Administrator** profile.
    - Click **Save & Finish**.

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## 5. Creating Fields and Relationships

1. **Create Number Field in Rice Details Object:**
   - Go to the setup page.
   - Click **Object Manager** and edit the **Rice Details** object.
   - Click **Fields & Relationships** > **New**.
   - Select **Number** and click **Next**.
   - Enter:
     - **Field Label**: Rice Distributed
     - **Length**: 5
   - Click **Next** > **Save**.
2. **Create Junction Object:**
   - Edit the **Rice Details** object.
   - Click **Fields & Relationships** > **New**.
   - Select **Master-Detail Relationship**.
   - Select **Supplier** as the related object.
   - Enter **Field Label** as **Supplier Name** and click **Save & New**.
   - Repeat the steps and select **Rice Mill** as the related object.
   - Enter **Field Label** as **Rice Mill 1** and click **Save**.
3. **Create Master-Detail Relationship between Consumer and Rice Mill:**
   - Edit the **Consumer** object.
   - Click **Fields & Relationships** > **New**.
   - Select **Master-Detail Relationship**.
   - Select **Rice Mill** as the related object.
   - Enter **Field Label** as **Rice Mill Name** and click **Save**.
4. **Create Roll-Up Summary Fields:**
   - **Supplier Object:**
     - Go to **Object Manager** > **Supplier** > **Fields & Relationships** > **New**.
     - Select **Roll-Up Summary**.
     - Enter **Field Label** as **Sum of Rice Distributed**.
     - Summarize **Rice Details** object, use **SUM** function for the **Rice Distributed** field.
   - **Rice Mill Object:**
     - Follow similar steps with **Field Label** as **Rice Distributed to Shops**.

- ○ Summarize **Rice Details** object.
  - ■ **Consumer Object:**
    - ○ Create a **Number** field with **Field Label** as **Rice Taken by Shops**.

## 6. Creating Cross-Object Formula Fields

1. **Create Cross-Object Formula in Consumer Object:**
   - ■ Go to **Object Manager** > **Consumer** > **Fields & Relationships** > **New**.
   - ■ Select **Formula** and click **Next**.
   - ■ Enter:
     - ○ **Field Label**: Amount Paid
     - ○ **Field Name**: Amount_Paid
     - ○ **Return Type**: Number
   - ■ Formula: `rice_taken_by_shops__c * rice_mill_name__r.rice_price_kg__c`
   - ■ Click **Check Syntax** and **Save**.
2. **Create Formula Field in Consumer Object:**
   - ■ Go to **Object Manager** > **Consumer** > **Fields & Relationships** > **New**.
   - ■ Select **Formula** and click **Next**.
   - ■ Enter:
     - ○ **Field Label**: Consumer Name
     - ○ **Field Name**: Consumer_Name
     - ○ **Return Type**: Text
   - ■ Formula: `First_Name__c + ' ' + Last_Name__c`
   - ■ Click **Check Syntax** and **Save**.

## 7. Creating Validation Rules

1. **Create Validation Rule for Phone Number in Consumer Object:**
   - ■ Go to **Object Manager** > **Consumer** > **Validation Rules** > **New**.
   - ■ Enter:
     - ○ **Rule Name**: PhonenumberOrEmailBlankRule
     - ○ **Description**: Phone number and email should not be blank.
     - ○ **Formula**: `OR(ISBLANK(phone_number__c), ISBLANK(email__c))`

- - - ○ **Error Message**: Please fill in your phone number.
    - ○ **Error Location**: Top of Page.
  - ■ Click **Save**.

## 8. Creating Page Layouts

1. **Create Page Layout for Consumer Object:**
   - ■ Go to **Object Manager** > **Consumer** > **Page Layouts** > **New**.
   - ■ Select the existing layout, name it **Consumer Layout**, and click **Save**.
   - ■ Add sections:
     - ○ **Personal Details**: Include fields **First Name**, **Last Name**, **Consumer Name**, **Phone Number**, **Email**, **Rice Mill Name**.
     - ○ **Rice Details**: Include fields **Rice Taken by Shop**, **Rice Type**.
     - ○ **Receipt Details**: Include fields **Mode of Payment**, **Amount Paid**.
   - ■ Click **Save**.

## 9. Creating Profiles

1. **Create Owner Profile:**
   - ■ Go to **Setup** > **Profiles** > **Clone** the **Standard User** profile.
   - ■ Name it **Owner** and click **Save**.
   - ■ Set **Custom Object Permissions** as required.
2. **Create Employer Profile:**
   - ■ Go to **Setup** > **Profiles** > **Clone** the **Standard Platform User** profile.
   - ■ Name it **Employer** and click **Save**.
   - ■ Set **Custom Object Permissions** as required.
3. **Create Worker Profile:**
   - ■ Go to **Setup** > **Profiles** > **Clone** the **Standard Platform User** profile.
   - ■ Name it **Worker** and click **Save**.
   - ■ Set **Custom Object Permissions** as required.

## 10. Creating Roles

1. **Create Owner Role:**
   - ■ Go to **Setup** > **Roles** > **Set Up Roles**.

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- Click **Expand All** and click **Add Role**.
- Enter **Role Label** as **Owner** under **CEO**.
- Click **Save**.

2. **Create Employer Role:**
   - Go to **Setup** > **Roles** > **Set Up Roles**.
   - Add a role under **Owner**.
   - Enter **Role Label** as **Employer**.
   - Click **Save**.

3. **Create Worker Role:**
   - Go to **Setup** > **Roles** > **Set Up Roles**.
   - Add a role under **Owner**.
   - Enter **Role Label** as **Worker**.
   - Click **Save**.

## 11. Creating Users

1. **Create Owner User:**
   - Go to **Setup** > **Users** > **New User**.
   - Enter:
     - **First Name**: Vicky
     - **Last Name**: Y
     - **Alias**: VY
     - **Email**: [owner.email@domain.com]
     - **Username**: [owner.username@domain.com]
     - **Nickname**: VY
     - **Role**: Owner
     - **Profile**: Owner
   - Click **Save**.

2. **Create Employer User:**
   - Go to **Setup** > **Users** > **New User**.
   - Enter:
     - **First Name**: Ram
     - **Last Name**: Ram
     - **Alias**: RR
     - **Email**: [employer.email@domain.com]

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- ○ **Username**: [employer.username@domain.com]
- ○ **Nickname**: RR
- ○ **Role**: Employer
- ○ **Profile**: Employer
- ■ Click **Save**.
3. **Create Worker User:**
    - ■ Go to **Setup** > **Users** > **New User**.
    - ■ Enter:
        - ○ **First Name**: Ragu
        - ○ **Last Name**: Raj
        - ○ **Alias**: RRJ
        - ○ **Email**: [worker.email@domain.com]
        - ○ **Username**: [worker.username@domain.com]
        - ○ **Nickname**: RRJ
        - ○ **Role**: Worker
        - ○ **Profile**: Worker
    - ■ Click **Save**.

# 12. Creating Reports

1. **Create Report for Rice Details:**
    - ■ Go to **App Launcher** and select **Reports**.
    - ■ Click **New Report**.
    - ■ Choose **Rice Details** as the report type.
    - ■ Click **Continue**.
    - ■ Add necessary fields like **Supplier Name**, **Rice Distributed**, **Rice Mill 1**, **Rice Type**.
    - ■ Add filters as needed (e.g., Date Range).
    - ■ Click **Save & Run**, name it **Rice Distribution Report**, and click **Save**.
2. **Create Report for Supplier and Rice Mill Summary:**
    - ■ Follow similar steps and select **Supplier** and **Rice Mill** objects.
    - ■ Add fields like **Supplier Name**, **Total Rice Distributed**, **Rice Mill 1**.
    - ■ Add appropriate filters and groupings.
    - ■ Click **Save & Run**, name it **Supplier and Rice Mill Summary**, and click **Save**.

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## 13. Creating Dashboards

1. **Create Dashboard for Rice Distribution:**
   - Go to **App Launcher** and select **Dashboards**.
   - Click **New Dashboard**.
   - Enter **Dashboard Name** as **Rice Distribution Dashboard**.
   - Select the folder to save and click **Create**.
   - Add components using the reports created:
     - **Chart**: Add a bar chart for **Rice Distribution Report**.
     - **Gauge**: Add a gauge for total rice distributed.
   - Click **Save**.
2. **Create Dashboard for Supplier and Rice Mill Summary:**
   - Follow similar steps and select the **Supplier and Rice Mill Summary** report.
   - Add components such as pie charts and bar graphs to visualize data.
   - Click **Save**.

## 14. Apex Code

1. **Create Apex Trigger for Rice Details Object:**
   - Go to **Setup** > **Apex Triggers** > **New**.
   - Enter the following code:

```
trigger consumerTrigger on consumer__c (After insert) {

    if(trigger.isAfter && trigger.isInsert) {

        ConsumerRecord.sendEmailNotification(trigger.new);

    }

}
```

   - Click **Save**.
2. **Create Apex Class for Custom Logic:**
   - Go to **Setup** > **Apex Classes** > **New**.

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- ■ Enter the following code:

```
class ConsumerRecord {

public static void sendEmailNotification (List<consumer__c> con){

  for(consumer__c c:con)

  {

    Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();

      email.setToAddresses( new List<String>{c.email__c});

      email.setSubject('Welcome to our company');

      email.setPlainTextBody('Dear '  + ' '+ ',\n\nWelcome to MY RICE!'+'You have been seen as a valuable
customer to us. PLease continue your journey with us, while we try to provide you with good quality resources.'+'\n'+

          "We are proud to associate with valuable customers like you and we look forward to
collaborating with you by providing more and more exciting discounts or even product offers too.' + '\n'

          +'So why taking a step back, take a leap of faith and shop with us more, while we provide with
the valuable products and offers'+'\n'+'\n'+'\n'+

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

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


  }

 }

}
```

- ■ Click **Save**.