

CRM Application for Wholesale Rice Mill



Project By:

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Salesforce Developer Org Setup Guide

1. Creating a Developer Account

1. Sign Up for Developer Account:

- Visit [Salesforce Developer Signup](#).
- Fill out the form with the following details:
 - **First Name & Last Name**
 - **Email**
 - **Role:** Developer
 - **Company:** College Name
 - **Country:** India
 - **Postal Code:** [Your Pin Code]
 - **Username:** Combination of your name and company (e.g., username@organization.com)
- Click **Sign Me Up**.

2. Account Activation:

- Check your email inbox for the verification email. It may take 5-10 minutes.
- Click **Verify Account** in the email.
- Set a password and answer a security question, then click **Change Password**.

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- You will be redirected to your Salesforce setup page.

2. Creating Custom Objects

1. Create Supplier Object:

- From the Setup page, go to **Object Manager**.
- Click **Create > Custom Object**.
- Enter the following details:
 - **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:

- From the Setup page, go to **Object Manager**.
- Click **Create > Custom Object**.
- Enter the following details:
 - **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**, and **Allow Search**.
- Click **Save**.

3. Create Consumer Object:

- Follow the same steps as above.
- Enter the following details:
 - **Label Name:** Consumer
 - **Plural Label Name:** Consumers
 - **Display Format:** consumers-{000}
 - **Starting Number:** 1
- Click **Save**.

4. Create Rice Details Object:

- Follow the same steps as above.
- Enter the following details:
 - **Label Name:** Rice Details

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- **Plural Label Name:** Rice Details
- **Display Format:** rice-{000}
- **Starting Number:** 1
- Click **Save**.

3. Creating Custom Tabs

1. Create Tab for Supplier Object:

- Go to the Setup page, type **Tabs** in the Quick Find box, and click **Tabs**.
- Click **New** under **Custom Object Tabs**.
- Select the **Supplier** object and choose a tab style.
- Click **Next**.
- Keep default settings for **Add to Profiles** and **Add to Custom Apps**.
- Ensure **Append tab to users' existing personal customizations** is checked.
- Click **Save**.

2. Create Tabs for Remaining Objects:

- Repeat the above steps for the following objects: **Rice Mill**, **Consumer**, and **Rice Details**.

4. Creating a Lightning App

1. Create Lightning App:

- Go to the Setup page, search for **App Manager**, and select **App Manager**.
- Click **New Lightning App**.
- Enter **MY RICE** as the app name and click **Next**.
- Keep default settings on the **App Options** page and click **Next**.
- Upload a relevant photo for your app.
- Add Navigation Items:
 - Select **Supplier**, **Rice Mill**, **Consumer**, and **Rice Details**.
 - Click the arrow button to move them to the selected items section.
 - Click **Next**.
- Add User Profiles:
 - Search for **System Administrator** and add it.
 - Click **Save & Finish**.

5. Creating Fields and Relationships

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1. Create a Number Field in Rice Details Object:

- Go to the Setup page, click on **Object Manager**, and edit the **Rice Details** object.
- Click on **Fields & Relationships > New**.
- Select **Number** as the data type and click **Next**.
- Enter:
 - **Field Label:** Rice Distributed
 - **Length:** 5
- Click **Next > Save**.

2. Create Junction Object:

- Edit the **Rice Details** object.
- Click on **Fields & Relationships > New**.
- Select **Master-Detail Relationship** and click **Next**.
- Select **Supplier** as the related object and click **Next**.
- Enter **Field Label:** Supplier Name and click **Next**.
- Click **Save & New**.
- Repeat for **Rice Mill** with **Field Label:** Rice Mill 1 (One).

3. Create Master-Detail Relationship:

- Edit the **Consumer** object.
- Click on **Fields & Relationships > New**.
- Select **Master-Detail Relationship** and click **Next**.
- Select **Rice Mill** as the related object.
- Enter **Field Label:** Rice Mill Name and click **Next**.
- Click **Save**.

4. Create Roll-up Summary Fields:

- For **Supplier** object:
 - Go to **Object Manager**, select **Supplier**, and click on **Fields & Relationships > New**.
 - Select **Roll-Up Summary** and click **Next**.
 - Enter **Field Label:** Sum of Rice Distributed.
 - Select **Rice Details** as the summarized object and **SUM** as the roll-up type.
 - Select **Rice Distributed** as the field to aggregate.
 - Click **Save**.
- For **Rice Mill** object, follow similar steps with **Field Label:** Rice Distributed to Shops.
- For **Consumer** object:
 - Create a number field with **Field Label:** Rice Taken by Shops.

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6. Creating Page Layouts

1. **Create Page Layout for Consumer Object:**
 - Go to **Setup > Object Manager > Consumer**.
 - Click on **Page Layouts > New**.
 - Select an existing layout, name it **Consumer Layout**, and click **Save**.
 - Drag and drop fields into sections named **Personal Details**, **Rice Details**, and **Receipt Details**.
 - Add fields as specified and click **Save**.

7. Creating Profiles and Roles

1. **Create Owner Profile:**
 - Go to **Setup > Profiles**.
 - Clone **Standard User**, name it **Owner**, and click **Save**.
 - Set permissions as shown in the diagram and save.
2. **Create Employer Profile:**
 - Clone **Standard Platform User**, name it **Employer**, and click **Save**.
 - Set default app settings and permissions as shown in the diagram and save.
3. **Create Worker Profile:**
 - Clone **Standard Platform User**, name it **Worker**, and click **Save**.
 - Set default app settings and permissions as shown in the diagram and save.
4. **Create Roles:**
 - **Owner Role:**
 - Go to **Setup > Roles > Set Up Roles**.
 - Click **Add Role** under **CEO** role.
 - Enter **Label:** Owner and save.
 - **Employer Role:**
 - Add role under **Owner** with **Label:** Employer and save.
 - **Worker Role:**
 - Add role under **Employer** with **Label:** Worker and save.

8. Creating Users

1. **Create User (Owner):**
 - Go to **Setup > Users > New User**.

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- Enter details:
 - **First Name:** Vicky
 - **Last Name:** Y
 - **Alias:** [Alias Name]
 - **Email:** [Your Email]
 - **Username:** [Username@domain.com]
 - **Role:** Owner
 - **User License:** Salesforce
 - **Profile:** Owner
- Click **Save**.
- 2. **Create User (Employer):**
 - Enter details:
 - **First Name:** Ram
 - **Last Name:** Ram
 - **Alias:** [Alias Name]
 - **Email:** [Your Email]
 - **Username:** [Username@domain.com]
 - **Role:** Employer
 - **User License:** Salesforce Platform
 - **Profile:** Standard Platform User
 - Click **Save**.
- 3. **Create User (Worker):**
 - Enter details:
 - **First Name:** Ragu
 - **Last Name:** Raj
 - **Alias:** [Alias Name]
 - **Email:** [Your Email]
 - **Username:** [Username@domain.com]
 - **Role:** Worker
 - **User License:** Salesforce Platform
 - **Profile:** Standard Platform User
 - Click **Save**.

9. Creating Sharing Settings

1. **Set Organization-Wide Defaults:**
 - Go to **Setup > Sharing Settings**.

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- Set the default sharing settings for **Supplier, Rice Mill, Consumer, and Rice Details** objects according to the organization's data sharing policies.
2. **Set Sharing Rules:**
 - Create sharing rules as needed to grant access to different user roles or profiles.

10. Creating Reports and Dashboards

1. **Create Reports:**
 - Go to **Reports** and click **New Report**.
 - Select the report type for your custom objects (e.g., **Supplier, Rice Mill, Consumer, Rice Details**).
 - Customize report filters and fields as needed.
2. **Create Dashboards:**
 - Go to **Dashboards** and click **New Dashboard**.
 - Add components (charts, graphs) based on the reports you created.

11. Creating Apex Classes and Triggers

1. **Create Apex Class:**
 - Go to **Setup > Apex Classes > New**.
 - Enter class name and code as needed for your functionality.
 - 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'
```

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```
+ '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});
```

```
    }  
}  
}
```

2. Create Apex Trigger:

- Go to **Setup > Apex Triggers > New**.
- Enter trigger name and code to define the behavior.
- Enter the following code

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

- Click **Save**