

CRM Application for Wholesale Rice Mill

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Salesforce Developer Setup Guide

1. Creating a Developer Account

1. Sign Up for Developer Account:

- Visit the Salesforce Developer Sign-Up page.
- Fill in the following details:
 - **First Name & Last Name:** Yerukala Jeya Sushma
 - **Email:** jyerukal@gitam.in
 - **Role:** Developer
 - **Company:** Gitam Institute of Technology
 - **Country:** India
 - **Postal Code:** [Your PIN Code]
 - **Username:** jeyasushma@gitam.in
- Click **Sign Me Up**.

2. Activate Your Account:

- Check your email inbox for an activation email from Salesforce.
- Click **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:**
- 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 the 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 a 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**.

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:**
 - `markdown`
 - `Copy code`
 - `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:**
 - `arduino`

- Copy code
- `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:**
 - `SCSS`
 - Copy code
 - `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 Employer Role:**
 - Go to **Setup > Roles > Set Up Roles**.

- Add a role under **Owner**.
 - Enter **Role Label** as **Employer**.
 - Click **Save**.
2. **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]
 - **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 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 filters and groupings.
 - Click **Save & Run**, name it **Supplier and Rice Mill Summary**, and click **Save**.

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:
 - apex
 - Copy 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**.
  - Enter the following code:
  - apex
  - Copy 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 ' + c.Name + ',\n\n' +
            'Welcome to MY RICE! You have been seen
as a valuable customer to us. ' +
            'Please continue your journey with us
while we provide you with high-quality resources.\n' +
            'We are proud to associate with valuable
customers like you and look forward to ' +
            'collaborating with you by offering more
exciting discounts or product offers.\n' +
            'Thank you for choosing us!\n\n'
        );
        Messaging.sendEmail(new
List<Messaging.SingleEmailMessage>{email});
    }
}

```

- Click **Save**.

This setup guide will help configure roles, users, reports, dashboards, and custom Apex code for the **CRM Application for Wholesale Rice Mill**.