

# A CRM APPLICATION FOR WHOLESALE RICE MILL

A detailed document of my project

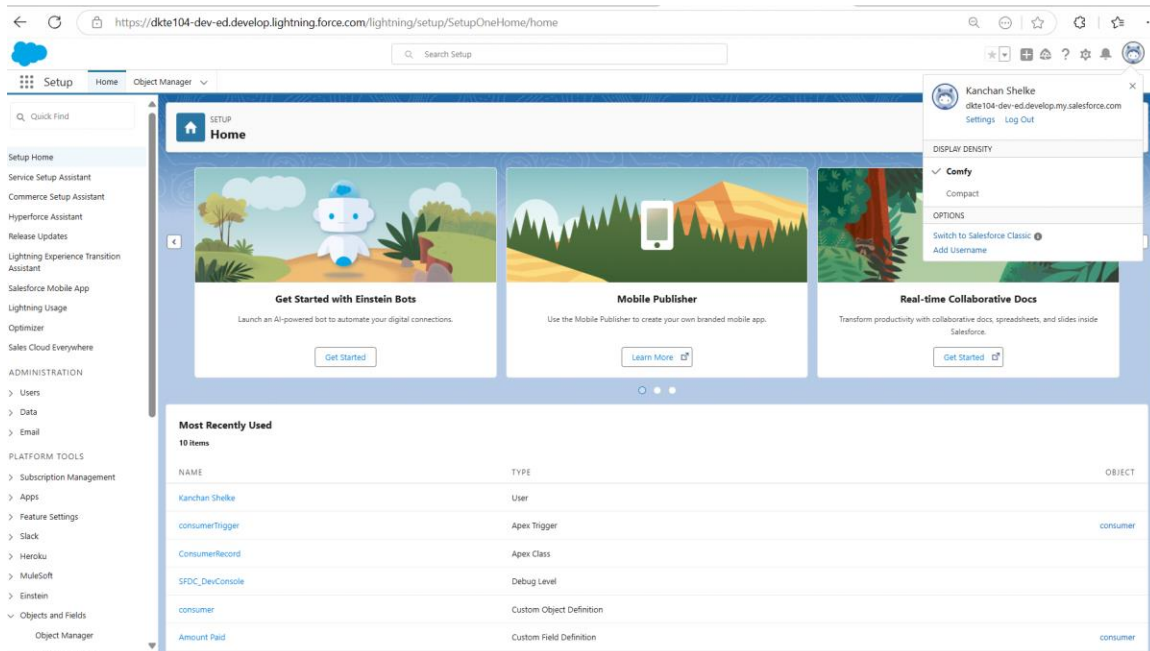
Prepared by

Kanchan Babasaheb Shelke

DKTE Society's Textile and Engineering Institute

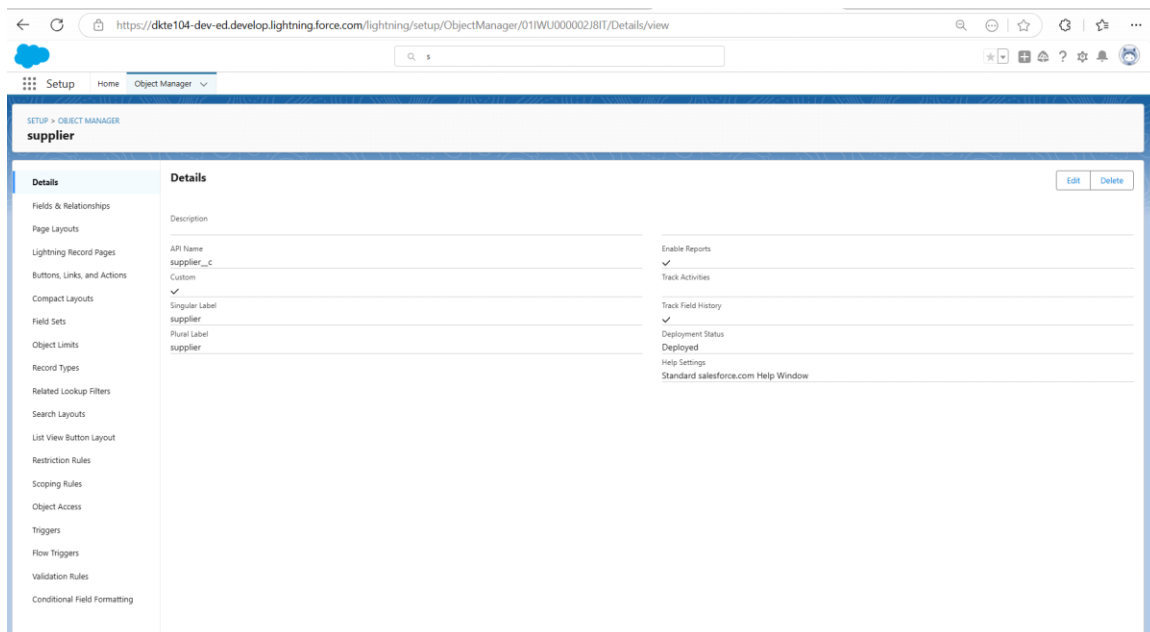
Introduction:

1.Developer Account Creation and Activation

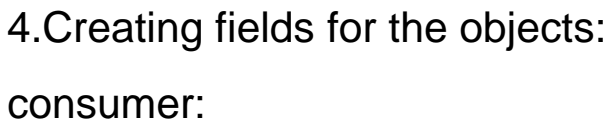


## 2.Object Creation

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



## 3.Creating of tabs& Lightning app for CRM Application:



#### 4. Creating fields for the objects:

consumer:

← ↻ 🔍 Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

**consumer**

Details

**Fields & Relationships** 13 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid__c	Formula (Number)		
Consumer Name	Consumer_Name__c	Formula (Text)		
consumer Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
email	email__c	Email		
First name	First_name__c	Text(18)		
Last Modified By	LastModifiedById	Lookup(User)		
Last name	Last_name__c	Text(18)		
Mode of payment	Mode_of_payment__c	Picklist		
Phone number	Phone_number__c	Phone		
rice mill name	rice_mill_name__c	Master-Detail(rice mill)		✓
rice taken by shops	rice_taken_by_shops__c	Number(5, 0)		
Rice type	Rice_type__c	Picklist		

supplier:

← ↻ 🔍 Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

**supplier**

Details

**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)		✓

rice mill:

← ↻ 🔒 https://dkte104-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011WU000002J8Lh/FieldsAndRelationships/view 🔍 A ☆ ⚙️ | ☆ ⋮

🔍 Search Setup

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER

rice mill

Details

**Fields & Relationships**  
8 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(UserGroup)		✓	
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)			▼
sum of rice distributed	sum_of_rice_distributed_c	Roll-Up Summary (SUM rice details)			▼

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

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

rice details:

← ↻ 🔒 https://dkte104-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011WU000002J7bp/FieldsAndRelationships/view 🔍 A ☆ ⚙️ | ☆ ⋮

🔍 Search Setup

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER

rice details

Details

**Fields & Relationships**  
6 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)			
rice details Name	Name	Auto Number		✓	▼
rice distributed	rice_distributed_c	Number(5, 0)			▼
rice mill 1	rice_mill_c	Master-Detail(rice mill)		✓	▼
supplier Name	supplier_c	Master-Detail(supplier)		✓	▼

Page Layouts

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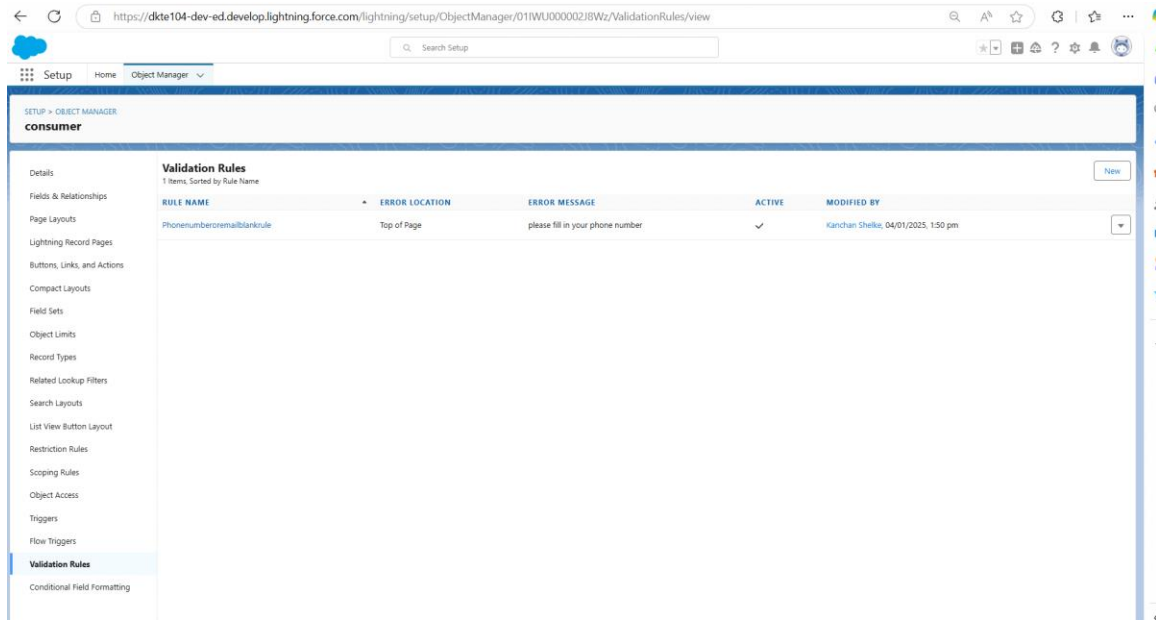
Triggers

Flow Triggers

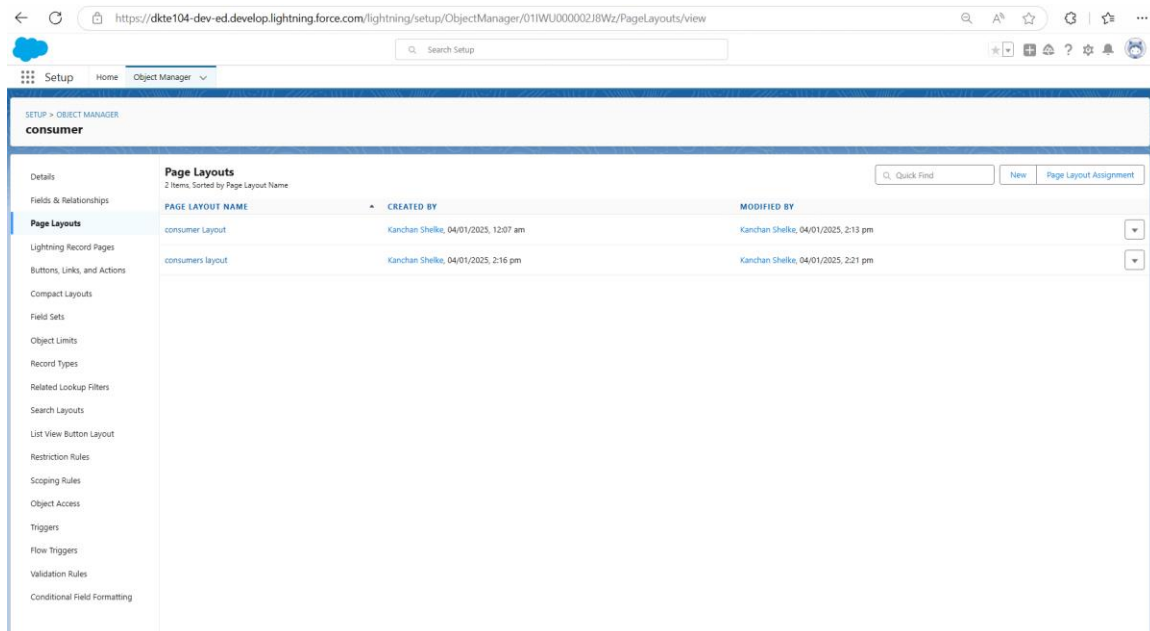
Validation Rules

Conditional Field Formatting

5.validation rules:

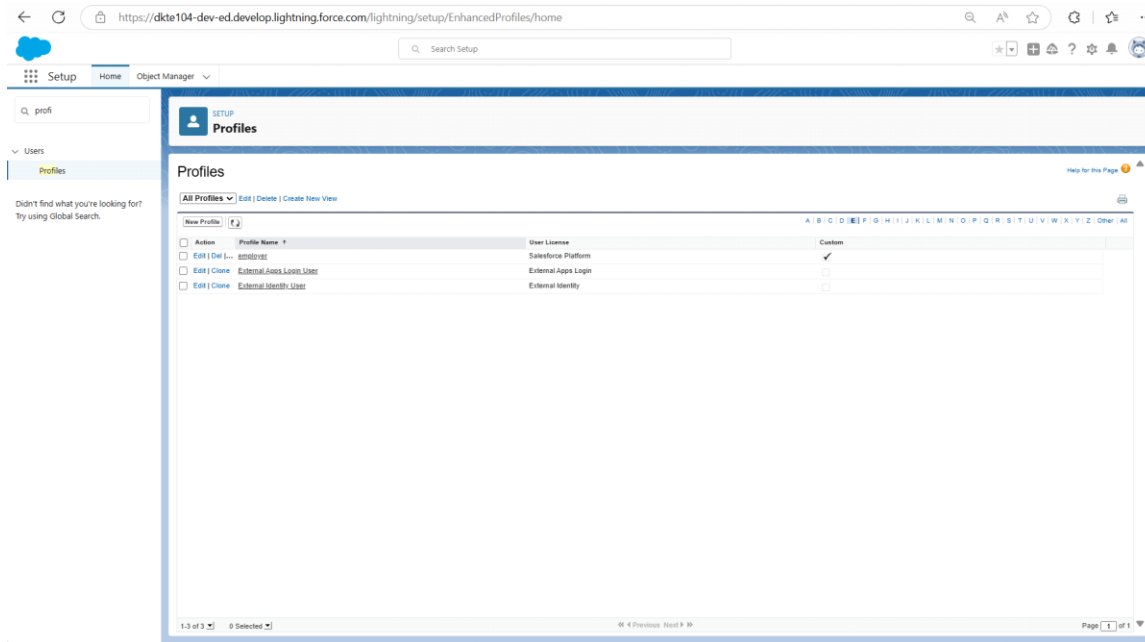


## 6.page Layout

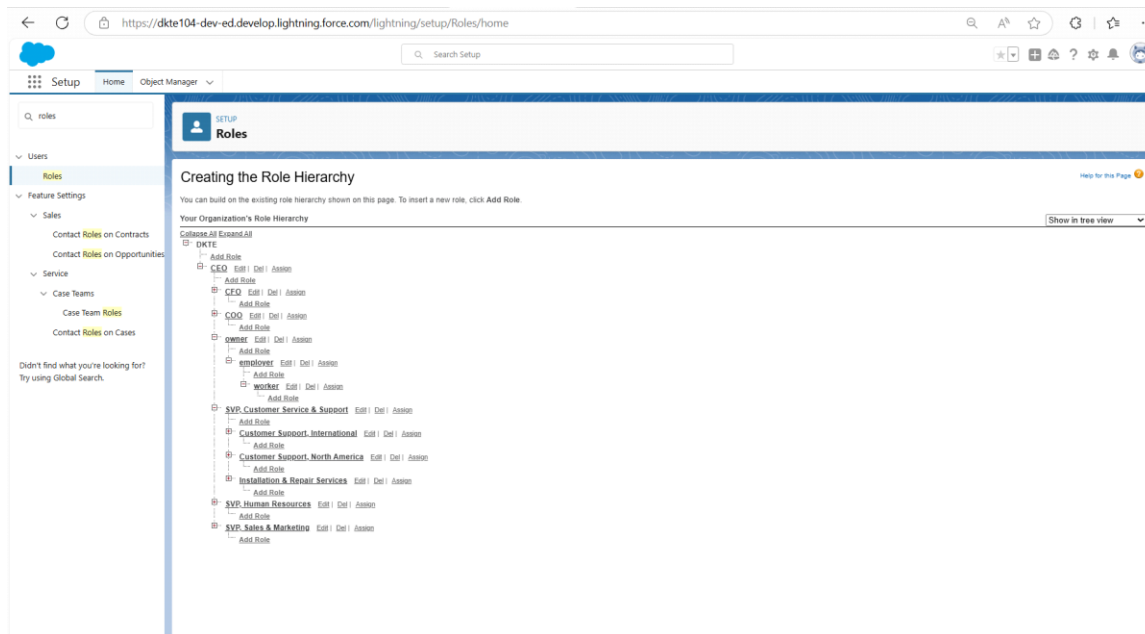


## 7.Profile Creations





## 8.Roles



## 9.Users





← ↻ 🔒 https://dkte104-dev-ed.develop.lightning.force.com/lightning/o/supplier\_c/list?filterName=\_Recent 🔍 A ☆ ⚙️ | ☆ ⋮

🔔 MY RICE 🔍 Search...

supplier rice mills consumers rice details \* App Launcher X

supplier

Recently Viewed

4 items • Updated a few seconds ago

new import Change Owner Assign Label

🔍 Search this list...

☐

supplier Name

▼

1

☐

sae

⌵

2

☐

Leo

⌵

3

☐

Isha

⌵

4

☐

Neha

⌵

← ↻ 🔒 https://dkte104-dev-ed.develop.lightning.force.com/lightning/o/rice\_mill\_c/list?filterName=\_Recent 🔍 A ☆ ⚙️ | ☆ ⋮

🔔 MY RICE 🔍 Search...

supplier rice mills consumers rice details \* App Launcher X

rice mills

Recently Viewed

5 items • Updated a few seconds ago

new import Change Owner Assign Label

🔍 Search this list...

☐

rice mill Name

▼

1

☐

rice-005

⌵

2

☐

rice-001

⌵

3

☐

rice-002

⌵

4

☐

rice-004

⌵

5

☐

rice-003

⌵

← [https://dkte104-dev-ed.develop.lightning.force.com/lightning/o/rice\\_details\\_c/list?filterName=\\_Recent](https://dkte104-dev-ed.develop.lightning.force.com/lightning/o/rice_details_c/list?filterName=_Recent) 🔍 A ☆ ⌂ ? ⚙️

MY RICE supplier rice mills consumers rice details \* App Launcher ×

rice details rice details "rice-003" was created. New Import Assign Label

3 items • Updated a few seconds ago Q Search this list... ⚙️ 📄 🔄 ✎ 🗑️ ⌵

	<input type="checkbox"/> rice details Name	
1	<input type="checkbox"/> rice-003	⌵
2	<input type="checkbox"/> rice-002	⌵
3	<input type="checkbox"/> rice-001	⌵

← [https://dkte104-dev-ed.develop.lightning.force.com/lightning/o/consumer\\_c/list?filterName=\\_Recent](https://dkte104-dev-ed.develop.lightning.force.com/lightning/o/consumer_c/list?filterName=_Recent) 🔍 A ☆ ⌂ ? ⚙️

MY RICE supplier rice mills consumers rice details \* App Launcher ×

consumers Recently Viewed New Import Assign Label

12 items • Updated a few seconds ago Q Search this list... ⚙️ 📄 🔄 ✎ 🗑️ ⌵

	<input type="checkbox"/> consumer Name	
1	<input type="checkbox"/> consumers-015	⌵
2	<input type="checkbox"/> consumers-014	⌵
3	<input type="checkbox"/> consumers-013	⌵
4	<input type="checkbox"/> consumers-012	⌵
5	<input type="checkbox"/> consumers-011	⌵
6	<input type="checkbox"/> consumers-010	⌵
7	<input type="checkbox"/> consumers-009	⌵
8	<input type="checkbox"/> consumers-008	⌵
9	<input type="checkbox"/> consumers-007	⌵
10	<input type="checkbox"/> consumers-006	⌵
11	<input type="checkbox"/> consumers-005	⌵
12	<input type="checkbox"/> consumers-004	⌵

[https://dkte104-dev-ed.develop.lightning.force.com/lightning/o/consumer\\_c/home](https://dkte104-dev-ed.develop.lightning.force.com/lightning/o/consumer_c/home)

Report:

←↻🔒https://dkte104-dev-ed.develop.lightning.force.com/lightning/r/Report/home?queryScope=mrui

🔍 Search...

🌟🔔🔒⚙️👤

⌵ MY RICE    supplier ⌵    rice mills ⌵    consumers ⌵    rice details ⌵    \*App Launcher ⌵ ⌵    \*Reports ⌵ ⌵

Reports

Recent

2 items

🔍 Search recent reports...    New Report    New Folder    ⌵

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	range of amount per day		estimated rice per day	Kanchan Shelke	5/1/2025, 8:38 pm	✓
Created by Me	Copy of range of amount per day		rice mill report	Kanchan Shelke	5/1/2025, 8:46 pm	✓
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

←↻🔒https://dkte104-dev-ed.develop.lightning.force.com/lightning/r/Report/00OWU000008vfhx2AE/view?queryScope=userFolders

🔍 Search...

🌟🔔🔒⚙️👤

⌵ MY RICE    supplier ⌵    rice mills ⌵    consumers ⌵    rice details ⌵    \*App Launcher ⌵ ⌵    \*range of amount per day ⌵ ⌵

Report: rice mills with consumers

range of amount per day

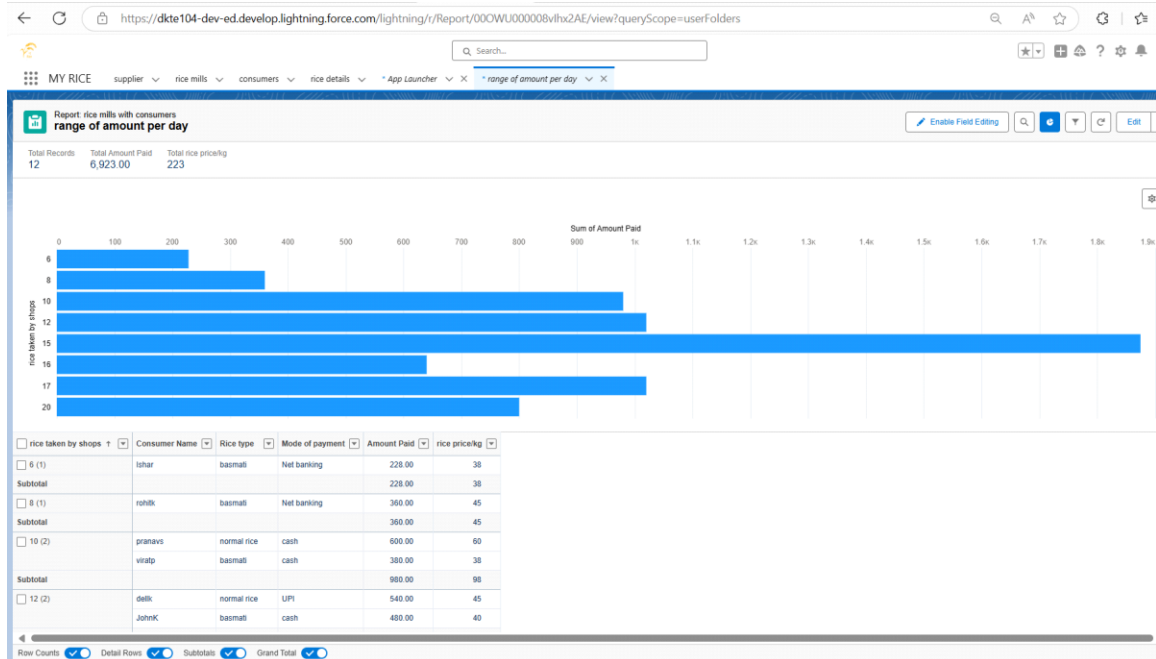
🔍    📊 Add Chart    ⌵    ⌵    ⌵    ⌵

Enable Field Editing

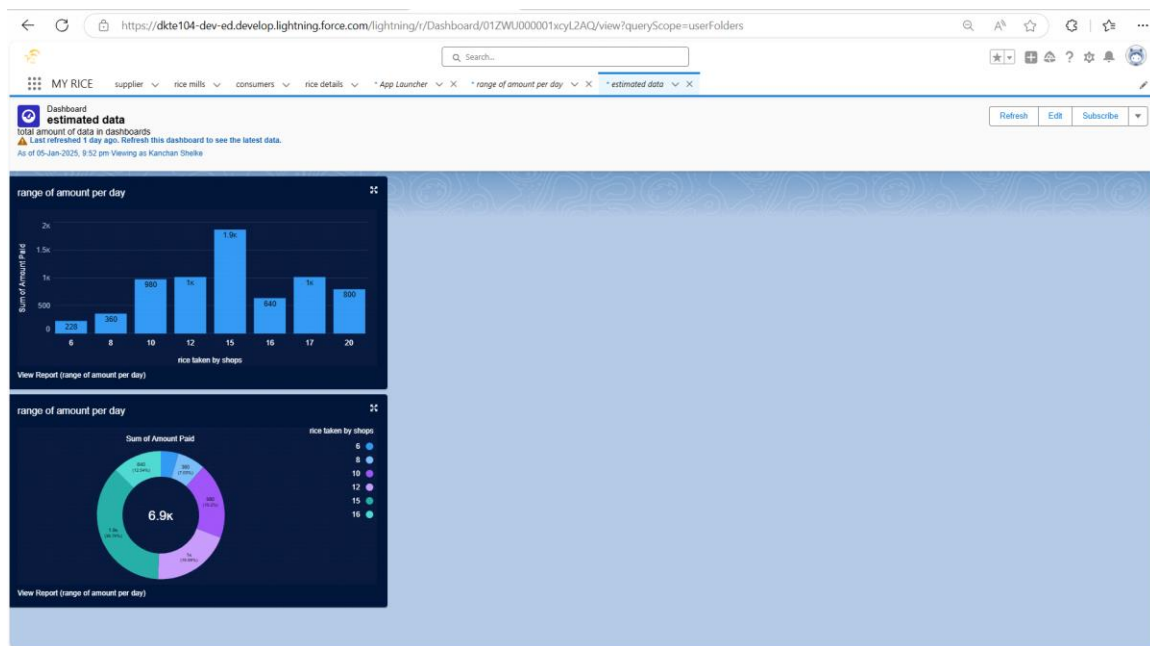
Total Records: 12    Total Amount Paid: 6,923.00    Total rice pricing: 223

<input type="checkbox"/> rice taken by shops ⌵	Consumer Name	Rice type	Mode of payment	Amount Paid	rice pricing
<input type="checkbox"/> 6 (1)	Ishar	basmati	Net banking	228.00	38
Subtotal				228.00	38
<input type="checkbox"/> 8 (1)	rohik	basmati	Net banking	360.00	45
Subtotal				360.00	45
<input type="checkbox"/> 10 (2)	pranav	normal rice	cash	600.00	60
	vratp	basmati	cash	380.00	38
Subtotal				980.00	98
<input type="checkbox"/> 12 (2)	delh	normal rice	UPI	540.00	45
	JohnK	basmati	cash	480.00	40
Subtotal				1,020.00	85
<input type="checkbox"/> 15 (3)	lees	normal rice	UPI	675.00	45
	sael	basmati	Net banking	600.00	40
	nehav	basmati	UPI	600.00	40
Subtotal				1,875.00	125
<input type="checkbox"/> 16 (1)	Neha	basmati	UPI	640.00	40
Subtotal				640.00	40
<input type="checkbox"/> 17 (1)	KanchanS	basmati	UPI	1,020.00	60
Subtotal				1,020.00	60
<input type="checkbox"/> 20 (1)	Tigerp	normal rice	cash	800.00	40
Subtotal				800.00	40
Total (12)				6,923.00	223

Row Counts    ☒    Detail Rows    ☒    Subtotals    ☒    Grand Total    ☒



## Dashboard:



## 11.Apex

https://dkte104-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage

File • Edit • Debug • Test • Workspace • Help • < • >

ConsumerRecord.apxc

Code Coverage: None • API Version: 62

```
1 public class ConsumerRecord {
2     public static void sendEmailNotification(List<consumer__c> con) {
3         for (consumer__c c : con) {
4             Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
5             email.setToAddresses(new List<String>{c.email__c});
6             email.setSubject('Welcome to our company');
7             email.setPlainTextBody(
8                 'Dear ' + c.Name + ',\n\n' +
9                 'Welcome to MY RICE! You have been seen as a valuable customer to us. Please continue your journey with us, while we try to
10                'We are proud to associate with valuable customers like you and we look forward to collaborating with you by providing more
11                'So why take a step back? Take a leap of faith and shop with us more, while we provide you with valuable products and offer:
12                'Thank you for buying. Here are some of the products that are brought by the customers who similarly bought products like ti
13            );
14            Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
15        }
16    }
17 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size
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Developer Console - Personal 2 - Microsoft Edge

https://dkte104-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: 62

```
1 trigger consumerTrigger on consumer__c (After insert) {
2     if(trigger.isAfter && trigger.isInsert) {
3         ConsumerRecord.sendEmailNotification(trigger.new);
4     }
5 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size
------	-------------	-----------	------	--------	------	------



