

# A CRM APPLICATION FOR WHOLESALE RICE MILL



# NAAN MUDHALVAN

## PROJECT REPORT

## Submitted by

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## **BONAFIDE CERTIFICATE**

Certified that this project report "**A CRM APPLICATION FOR WHOLESALE RICE MILL**" is the bonafide work of "**NITHEESH KUMAR V (620120104070), SANJAY B(620120104082), VIGNESH C(620120104108), MOORTHI P(620120104065)**" who carried out the project work under my supervision.

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**HEAD OF THE DEPARTMENT**

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# **CHAPTER-1**

## **PROJECT SPECIFICATION**

### **1.1 Project Goal**

The primary goal of this project is to streamline operations at our gas filling station by implementing a CRM system to::

- Enhance customer service and experience by offering personalized services, special promotions, and improved communication.
- Optimize inventory management to prevent shortages and surpluses, thereby reducing operational costs and improving product availability.
- Increase overall operational efficiency through automated sales processes and better task management.

### **1.2 Project Scope**

This project encompasses a comprehensive range of activities. It includes the assessment of our current operational challenges and customer service deficiencies. We will explore and evaluate various CRM solutions to select the one best suited to our gas station's unique requirements and budget. The selected CRM will be customized to meet our specific needs, encompassing data fields, workflows, and reporting capabilities:

- Needs Assessment: Identifying and documenting current operational challenges and customer service deficiencies.
- CRM Selection: Thoroughly researching and evaluating CRM solutions to find the best fit for our station's needs and budget.
- Customization: Configuring the selected CRM system to meet the specific requirements of our gas filling station, including data fields, workflows, and reporting.
- Data Migration: Migrating existing customer data into the CRM system and ensuring data accuracy.
- Staff Training: Providing comprehensive training to station staff to ensure they are proficient in using the CRM system.
- Change Management: Developing a change management plan to address any potential resistance to the new system and to promote user adoption.
- Ongoing Support and Maintenance: Implementing a plan for continuous support, system maintenance, and potential future enhancements.

## 1.3 Problem Statement Definition

Problem for	Trying to	But	Which makes
Employee	I'm an employee at our gas filling station, and I'm striving to effectively manage customer records, streamline fuel orders, and implement loyalty programs for our diverse customer base.	However, the manual and time-intensive nature of these tasks, coupled with the potential for errors, has created operational challenges.	This inefficiency not only makes our tasks overwhelming but also hinders our ability to provide a seamless and efficient customer experience at the station.

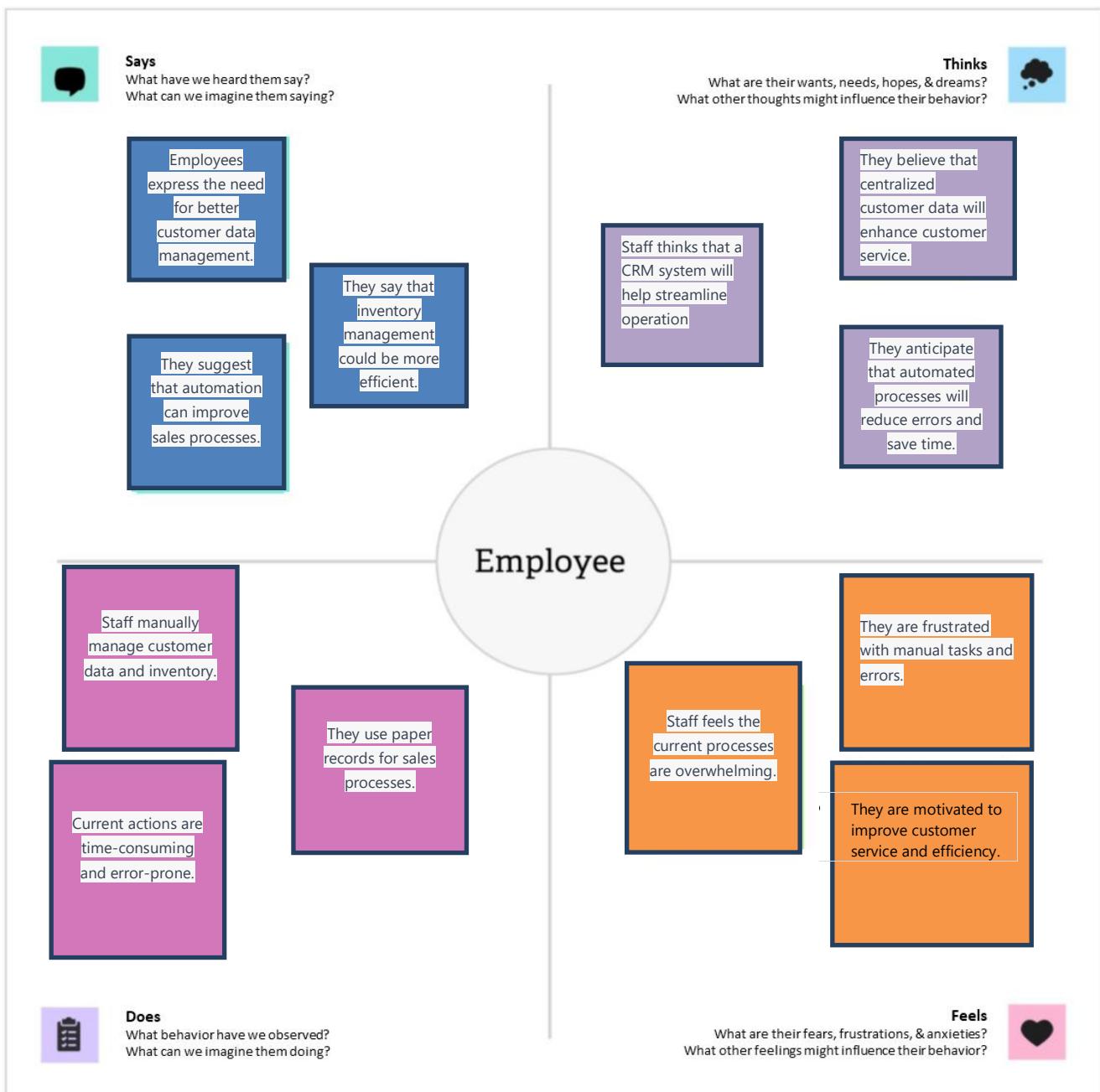
## 1.4 Empathy Map Canvas

An empathy map is a simple, easy-to-digest visual that captures knowledge about a user's behavior and attitudes.

It is a useful tool to help teams better understand their users. Creating an effective solution requires understanding the true problem and the person who is experiencing it.

The exercise of creating the map helps participants consider things from the user's perspective along with his or her goals and challenges.

Continuing from the previous section, the empathy map canvas will provide a more comprehensive insight into the needs, emotions, pain points, and goals of customers, employees, and stakeholders. It will also explore potential solutions to address their concerns effectively.



## 1.5 Empathy Map Canvas

S. No	Parameter	Description
1.	<b>Says</b>	In this section, you document what the stakeholder says. This includes their statements, comments, and feedback related to the project. It helps you understand their verbal expressions and concerns.
2.	<b>Thinks</b>	Here, you explore what the stakeholder might be thinking. This includes their thoughts, concerns, or goals that may not be openly expressed. It helps uncover their underlying motivations.
3.	<b>Pains</b>	Document the pain points or challenges that the stakeholder experiences. This could include frustrations, obstacles, or difficulties they encounter in the context of the project.
4.	<b>Gains</b>	This aspect highlights the potential benefits, desires, and goals that individuals or groups hope to achieve or experience as a result of the situation or project.
5..	<b>Feels</b>	This parameter addresses the stakeholder's emotional state. It helps you identify their emotions, such as joy, frustration, or anxiety, related to the project or situation.
6.	<b>Does</b>	This section describes the actions or behaviors of the stakeholder. It helps you understand their practical actions, routines, or interactions related to the project.

## 1.6 Functional & Technical Requirements

### 1.6.1 Functional Requirements

Requirement	Description
<b>Customer Data Management</b>	The CRM system should allow for the centralized management of customer information, including contact details, purchase history, and preferences.
<b>Personalized Customer Service</b>	The system should support the ability to create and manage customer profiles, enabling us to provide personalized services, special promotions, and targeted offers.
<b>Inventory Management</b>	Real-time inventory tracking and automated restocking processes should be integrated to optimize inventory management. This should prevent shortages, reduce operational disruptions, and control inventory costs..
<b>Automated Sales Processes</b>	The CRM system should facilitate automated sales processes, including order processing and payment, to ensure a smooth and error-free customer experience.
<b>Reporting and Analytics:</b>	Comprehensive reporting and data analytics features should be available to provide insights into customer behavior, sales trends, and inventory management. This will support data-driven decision-making.
<b>Integration Capabilities</b>	The CRM system should offer integration options with other systems used at the gas filling station, including accounting and financial software. Seamless integration will ensure a cohesive operational environment.

### 1.6.2 Technical Requirements

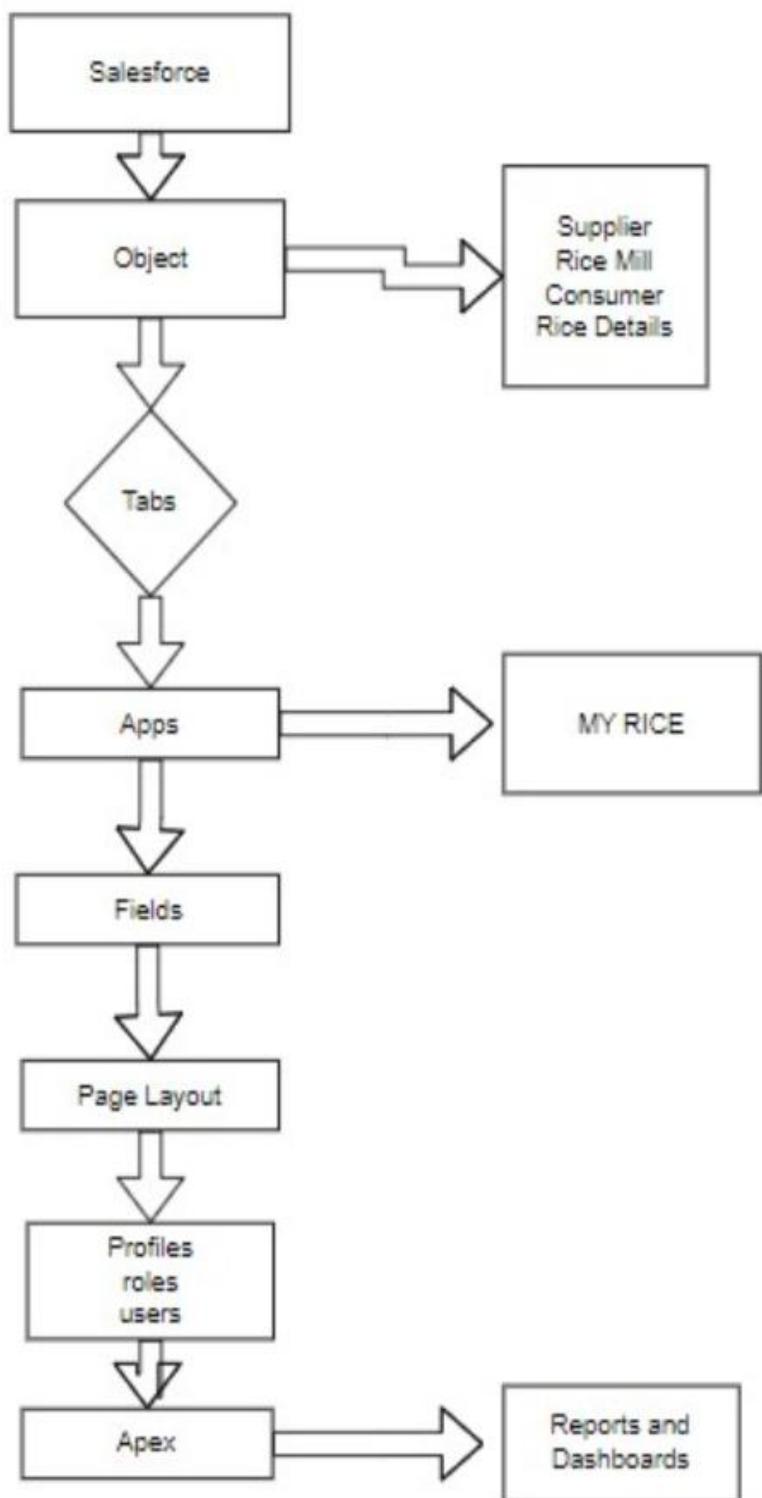
Requirement	Description
<b>Scalability:</b>	The CRM system should be scalable to accommodate the potential growth of our business. It should handle an increasing volume of customer data and transactions without performance degradation.

<b>Data Security</b>	Robust data security measures, such as encryption and access controls, should be in place to protect sensitive customer information and transaction data.
<b>Data Backup and Recovery</b>	The CRM system should have a reliable data backup and recovery mechanism to safeguard against data loss in case of system failures or errors.
<b>Cloud-Based or On-Premises</b>	The choice between a cloud-based or on-premises CRM system should be evaluated based on our specific infrastructure and data management requirements.
<b>User-Friendly Interface</b>	The system should feature a user-friendly interface to ensure ease of use and rapid adoption by our staff..
<b>Technical Support and Updates</b>	Ongoing technical support, system maintenance, and regular updates should be provided to keep the CRM system up to date and secure.

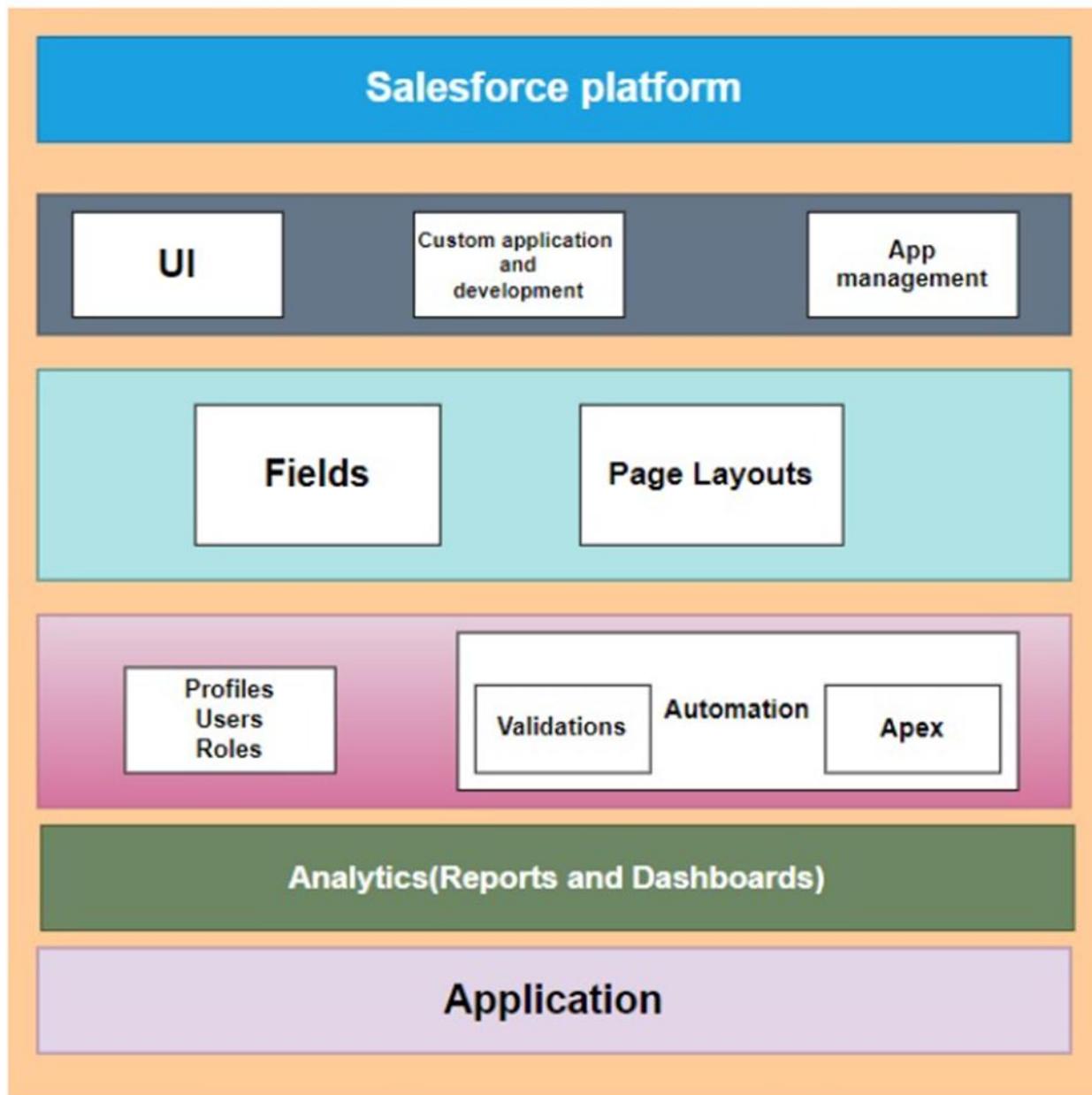
## 1.7 Project Road Map

### 1.7.1 Data Flow Diagram

A Data Flow Diagram (DFD) is a traditional visual representation of the information flows within a system. A neat and clear DFD can depict the right amount of the system requirement graphically. It shows how data enters and leaves the system, what changes the information, and where data is stored.



### 1.7.2 Technical Architecture



**CHAPTER-2**

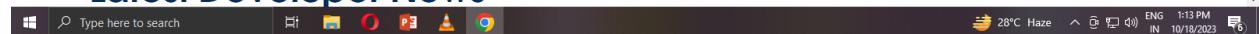
# PREPARATION DATA MODELING

## 2.1 Salesforce Developer Org

In Salesforce, a Developer Sign Up or Developer Edition is a special type of Salesforce environment that is primarily used for development, testing, and learning purposes.

The screenshot shows the Salesforce Developer Portal homepage. At the top, there's a navigation bar with links for Products, Industries, Customers, Learning, Support, Company, and Salesforce+. A search bar labeled "Search Developers" is also present. Below the navigation, a sub-navigation bar includes links for Developers, Home, Documentation, APIs, Discover, Build, and Connect. A prominent blue button on the right says "Browse Trials". The main content area features a large circular graphic with a blue bear illustration and the text "Get release-ready today!". Below this, there's a callout for the "Salesforce Developer's Guide to the Winter '24 Release". A "Read it now" button is visible. To the right of the main content, there's a sidebar with various developer-related links and resources.

## Latest Developer News

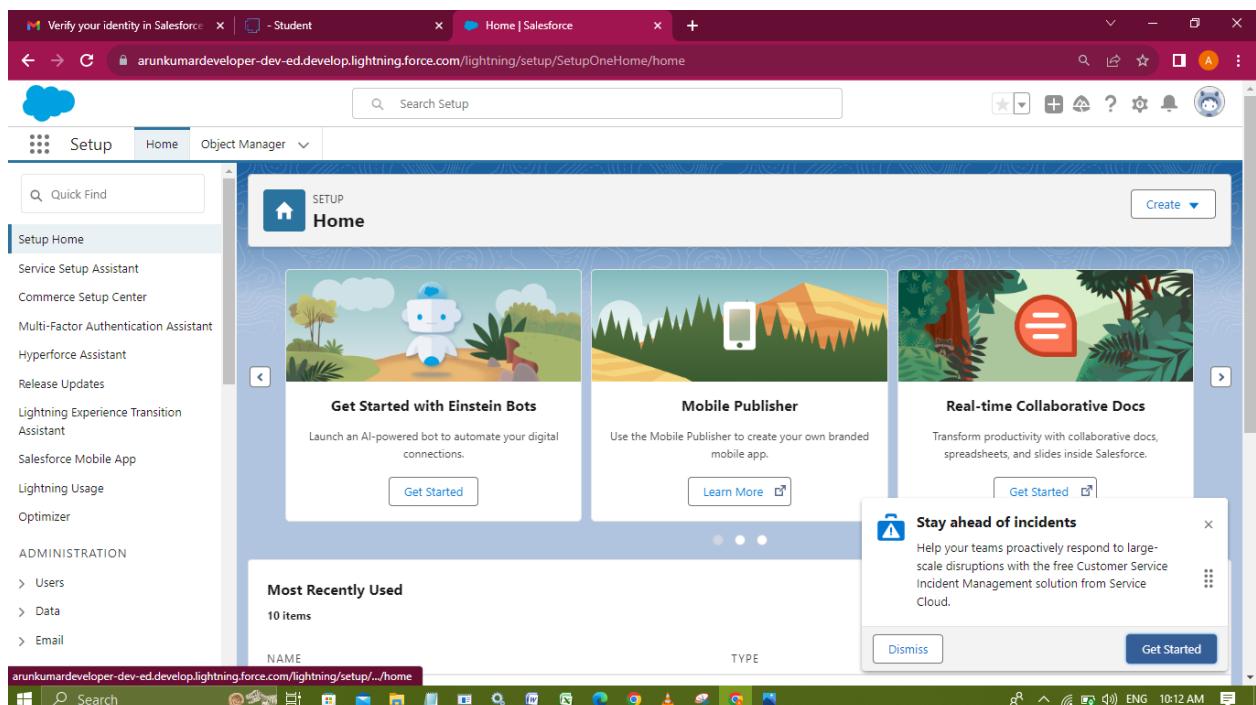
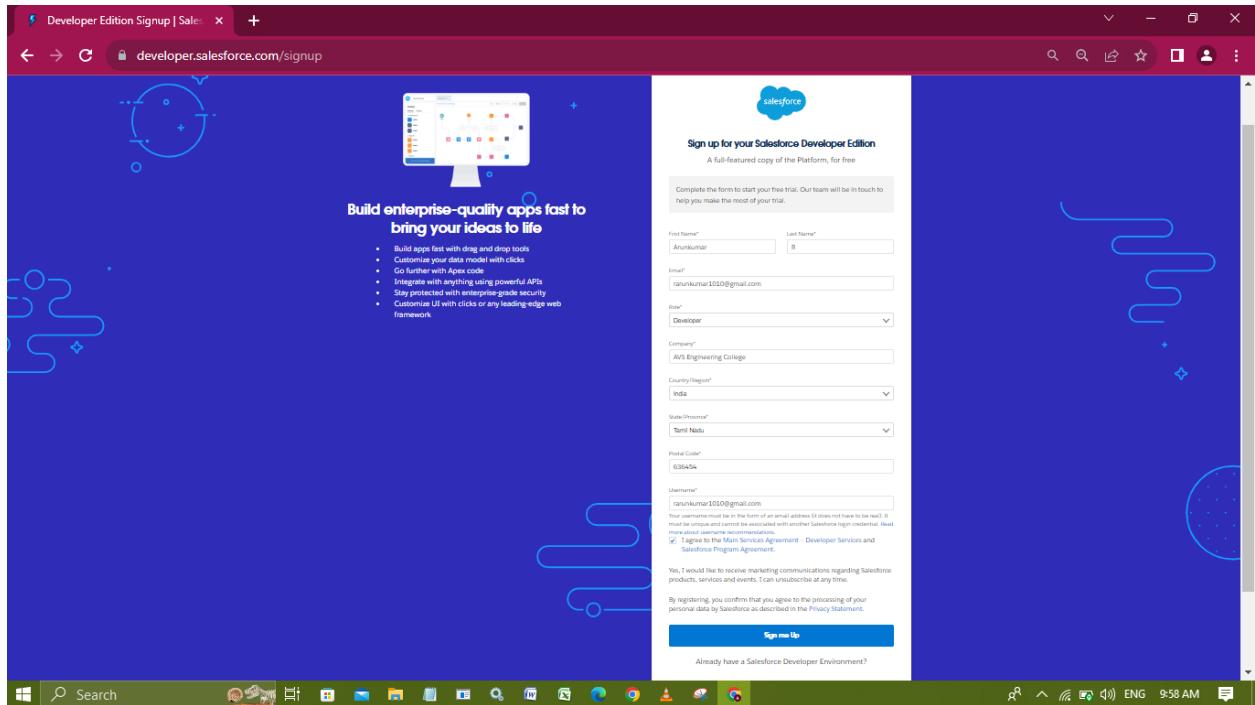


The screenshot shows the Lightning Platform interface. On the left, there's a sidebar with sections like "Lightning Components", "Standard API", "Custom API", and "Custom Manager API". The main area displays a dashboard with a pie chart, a map of the United States, and various status indicators. A sub-menu titled "Lightning Platform" is open, showing options like "Get Started", "API Reference", and "Developer Guide". The overall theme is a dark blue with white text and icons.

## Account Activation

The screenshot shows a form for activating a Developer Edition account. At the top, there's a logo for "salesforce lightning platform". Below it, the text "Get your very own Developer Edition" and "A full-featured copy of Lightning Platform, for FREE." is displayed. The form has several input fields: "Name" (with "First" and "Last" sub-fields), "Email" (with placeholder "Your email address"), "Role" (with placeholder "Your job role"), "Company" (with placeholder "Company Name"), and "Country" (with a dropdown menu). There are also "Next Step" and "Cancel" buttons at the bottom.

Activation tracks information about devices from which users have verified their identity.



## 2.2 Object Creation

Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc. Custom objects: Supplier Object,Rice Mill, Others.

## Create the Supplier Object & Rice Mill Object:

**SETUP > OBJECT MANAGER**  
**supplier**

**Details**

Label: supplier Example: Account  
Plural Label: suppliers Example: Accounts  
Starts with vowel sound:

The Object Name is used when referencing the object via the API.  
Object Name: supplier Example: Account

Description:   
Context-Sensitive Help Setting:  Open the standard Salesforce.com Help & Training window  Open a window using a Visualforce page  
Content Name:   
None

**Enter Record Name Label and Format**  
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.  
Record Name: supplier Name Example: Account Name  
Data Type: Text

**Optional Features**

**SETUP > OBJECT MANAGER**  
**rice mill**

**Details**

Label: rice mill Example: Account  
Plural Label: rice mills Example: Accounts  
Starts with vowel sound:

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.  
The Object Name is used when referencing the object via the API.  
Object Name: rice\_mill Example: Account

Description:   
Context-Sensitive Help Setting:  Open the standard Salesforce.com Help & Training window  Open a window using a Visualforce page  
Content Name:   
None

**Enter Record Name Label and Format**  
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.  
Record Name: Rice Mill Example: Account Name  
Data Type: Auto Number

## Create the Others Object

**New Custom Object**

**Custom Object Information**

The singular and plural labels are used in tabs, page layouts, and reports.

Label	Consumer	Example: Account
Plural Label	Consumers	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	Consumer	Example: Account
-------------	----------	------------------

Description

Context-Sensitive Help Setting

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Content Name

-None-

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name	consumer Name	Example: Account Name
Data Type	Auto Number	

**New Custom Object**

**Custom Object Information**

The singular and plural labels are used in tabs, page layouts, and reports.

Label	rice details	Example: Account
Plural Label	rice details	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	rice_details	Example: Account
-------------	--------------	------------------

Description

Context-Sensitive Help Setting

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Content Name

-None-

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name	rice details Name	Example: Account Name
Data Type	Auto Number	

## 2.3 The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom Color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app.

**To create a lightning app page**

naan mudhalvan - Yahoo Search | - Student | salesforce login - Yahoo Search | MY RICE - Lightning App Builder | +

d5g00000khbjleaz-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u5g000004lnh1AAA&retUrl=https%3A%2F%2Fd5g00000khbjleaz-d...

Lightning App Builder App Settings App Details & Branding

App Options Utility Items (Desktop Only) Navigation Items User Profiles

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

\*App Name: MY RICE

Developer Name: MY\_RICE

Description: Enter a description...

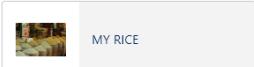
App Branding

Image: 

Primary Color Hex Value: #0070D2

Org Theme Options:  Use the app's image and color instead of the org's custom theme

App Launcher Preview



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d5g00000khbjleaz-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u5g000004lnh1AAA&retUrl=https%3A%2F%2Fd5g00000khbjleaz-d...

Lightning App Builder App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Type to filter list...

Create

Accounts  
Alert Settings  
All Sites  
Alternative Payment Methods  
Analytics  
App Launcher  
Appointment Categories  
Appointment Invitations  
Approval Requests  
Asset Action Sources  
Asset Actions

Selected Items

supplier  
rice mills  
consumers  
rice details

`javascript:void(0);`

**User Profiles**

Choose the user profiles that can access this app.

**Available Profiles**

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website
- Authenticated Website
- B2B Reordering Portal Buyer Profile
- Consumer
- Contract Manager
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile
- Customer Community Login User
- Customer Community Plus Login User

**Selected Profiles**

- System Administrator

## Fields:

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simple.

**rice details**

**New Custom Field**

**Step 1. Choose the field type**

Specify the type of information that the custom field will contain.

**Data Type**

None Selected

Select one of the data types below.

Auto Number

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

External Lookup Relationship

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

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d5g00000khbjleaz-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011g000004Gzgb/FieldsAndRelationships/new

Setup Home Object Manager

supplier

SETUP > OBJECT MANAGER

supplier

New Custom Field

Step 1. Choose the field type

Step 1

Next Cancel

Help for this Page

Details

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
- Scoping Rules

None Selected

Auto Number

Formula

Roll-Up Summary

Lookup Relationship

Master-Detail Relationship

External Lookup Relationship

Select one of the data types below.

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

None Selected

Auto Number

Formula

Roll-Up Summary

Lookup Relationship

Master-Detail Relationship

External Lookup Relationship

Checkbox

Currency

Date

DateTime

Select one of the data types below.

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the DateTime field.

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d5g00000khbjleaz-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011g000004Gzgb/FieldsAndRelationships/new

Setup Home Object Manager

rice mill

SETUP > OBJECT MANAGER

rice mill

New Custom Field

Step 1. Choose the field type

Step 1

Next Cancel

Help for this Page

Details

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
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

None Selected

Auto Number

Formula

Roll-Up Summary

Lookup Relationship

Master-Detail Relationship

External Lookup Relationship

Checkbox

Currency

Date

DateTime

Select one of the data types below.

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

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Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the DateTime field.

The screenshot shows the Salesforce Object Manager interface for the 'consumer' object. On the left, a sidebar lists categories like Details, 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, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main pane displays a list of field types with their descriptions:

- Formula**: A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary**: A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship**: Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
  - The relationship field is required on all detail records.
  - The ownership and sharing of a detail record are determined by the master record.
  - When a user deletes the master record, all detail records are deleted.
  - You can create rollup summary fields on the master record to summarize the detail records.
- Master-Detail Relationship**: Creates a relationship that links this object to another object. The master object is the source of the values in the list.
- External Lookup Relationship**: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- Checkbox**: Allows users to select a True (checked) or False (unchecked) value.
- Currency**: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date**: Allows users to enter a date or pick a date from a pop-up calendar.
- Date/Time**: Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Email**: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Geolocation**: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Number**: Allows users to enter any number. Leading zeros are removed.
- Percent**: Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
- Phone**: Allows users to enter any phone number. Automatically formats it as a phone number.
- Picklist**: Allows users to select a value from a list you define.
- Picklist (Multi-Select)**: Allows users to select multiple values from a list you define.
- Text** (selected): Allows users to enter any combination of letters and numbers.
- Text Area**: Allows users to enter up to 255 characters on separate lines.
- Text Area (Long)**: Allows users to enter up to 131,072 characters on separate lines.

## Page Layout:

Page Layout in Salesforce allows us to customize the design and organize detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

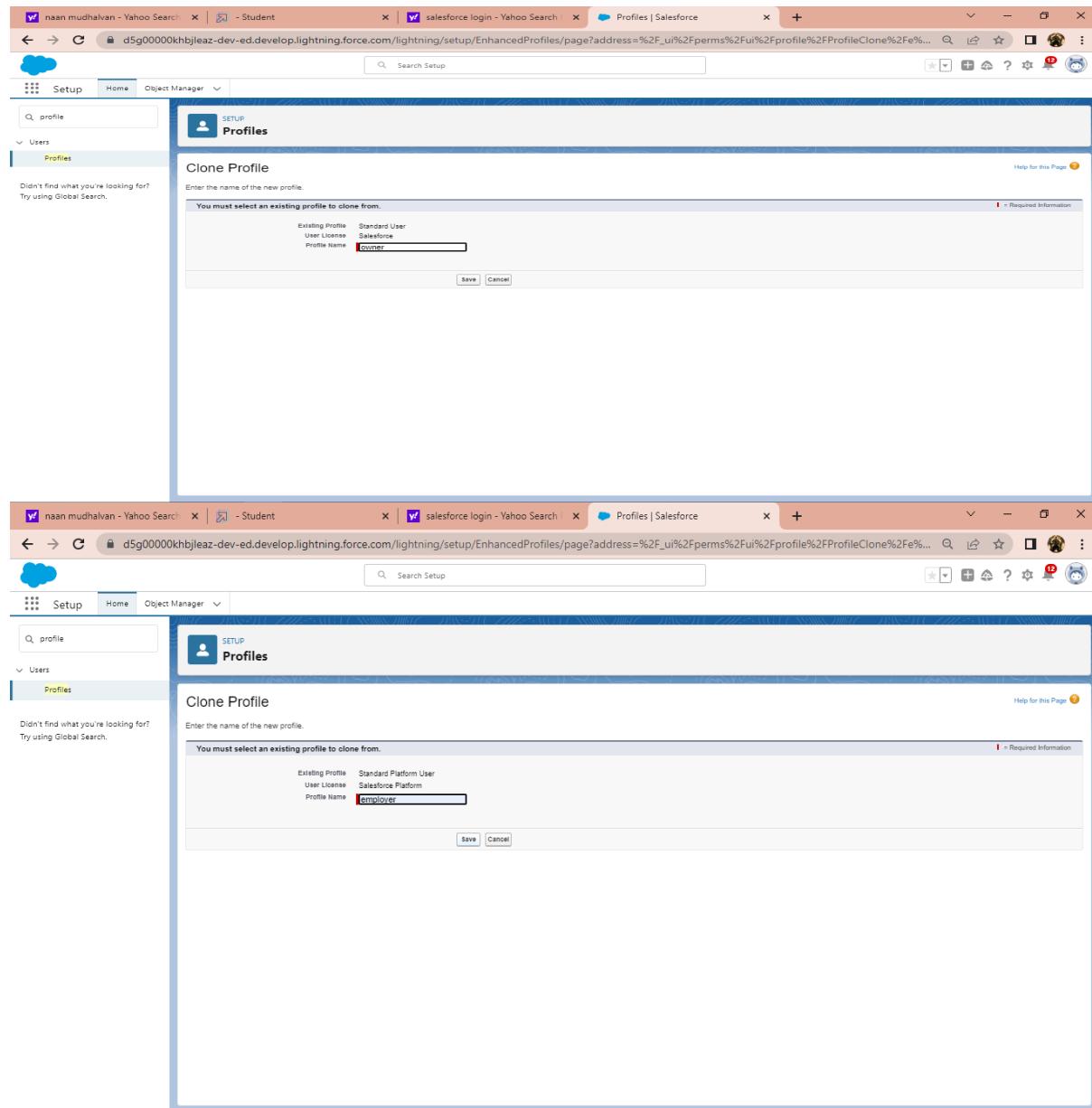
# CHAPTER-3

## USERS & DATA SECURITY

### 3.1 Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

## Creating a Profiles



### 3.2 Role & Role Hierarchy:

Salesforce roles are record-level access controls that define what data a user can see in Salesforce.

# Creating a Role

The screenshot displays two consecutive pages from the Salesforce Setup interface, specifically the Roles section.

**Page 1: Understanding Roles**

This page provides an overview of role hierarchies. It features a "Sample Role Hierarchy" diagram titled "Territory-based Sample". The hierarchy is as follows:

- Executive Staff** (CEO, President, CFO, VP, Sales, Marketing, HR, Other Staff)
- Western Sales Director** (Director of the West Sales team)
- Eastern Sales Director** (Director of the East Sales team)
- International Sales Director** (Director of International Sales)
- Western Sales Rep** (CA Sales Rep, OR Sales Rep)
- Eastern Sales Rep** (NY Sales Rep, MA Sales Rep)
- International Sales Rep** (European Sales Rep)

Each role is described with its permissions:

- CEO, President, CFO, VP, Sales, Marketing, HR, Other Staff**: View & edit data, generate reports for all users below or at same level, view & edit data, generate reports for all users above or at same level.
- Western Sales Director**: View & edit data, generate reports for all users below or at same level.
- Eastern Sales Director**: View & edit data, generate reports for all users below or at same level.
- International Sales Director**: View & edit data, generate reports for all users below or at same level.
- Western Sales Rep**: View & edit data, generate reports only for own data.
- Eastern Sales Rep**: View & edit data, generate reports only for own data.
- International Sales Rep**: View & edit data, generate reports only for own data.

**Page 2: New Role**

This page shows the "Role Edit" form for creating a new role named "owner". The form includes fields for Label ("owner"), Role Name ("owner"), and "This role reports to" ("CEO"). The "Role Name as displayed on reports" field is empty. At the bottom are "Save", "Save & New", and "Cancel" buttons.

The screenshot shows the Salesforce 'Roles' setup page. The left sidebar navigation includes 'Setup', 'Home', and 'Object Manager'. Under 'Sales', there are sections for 'Contact Roles on Contracts', 'Contact Roles on Opportunities', and 'Case Team Roles'. A message at the bottom says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Creating the Role Hierarchy' and displays 'Your Organization's Role Hierarchy'. It shows a tree structure of roles:

- Salesforce**
  - CEO**
  - CFO**
  - COS**
  - owner**
  - SVP Customer Service & Support**
    - Customer Support International**
    - Customer Support North America**
    - Installation & Repair Services**
  - SVP Human Resources**
  - SVP Sales & Marketing**
    - VP International Sales**
    - VP Marketing**
    - Marketplace Team**

Actions for each role include 'Edit', 'Delete', and 'Assign'. A 'Show in tree view' link is available in the top right of the hierarchy section.

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** The top navigation bar includes tabs for "naan mudhalvan - Yahoo Search" (active), "Student", "salesforce login - Yahoo Search", and "Roles | Salesforce".
- Left Sidebar:** A sidebar titled "Setup" contains the following sections:
  - Users:** "Roles" (selected)
  - Feature Settings:** "Contact Roles on Contracts", "Contact Roles on Opportunities"
  - Sales:** "Contact Roles on Cases", "Case Team Roles", "Contact Roles on Cases"
  - Service:** "Case Teams"
- Search Bar:** A search bar at the top right contains the placeholder "Search Setup".
- Page Content:** The main content area is titled "SETUP Roles" and shows a "New Role" form.
  - Role Edit Form Fields:**
    - Label: employer
    - Role Name: employer
    - This role reports to: owner
    - Role Name as displayed on reports: (empty field)
  - Buttons:** "Save", "Save & New", and "Cancel".
- Help:** A "Help for this Page" link is located in the top right corner of the content area.

The screenshot shows the 'Roles' setup page in Salesforce. The left sidebar has 'roles' selected under 'Users'. The main area is titled 'Creating the Role Hierarchy' and displays a tree structure of roles. At the top level, there are 'Salesforce' and 'owner' roles. Under 'Salesforce', there are 'COO', 'employee', and 'SVP, Customer Service & Support' roles. Under 'SVP, Customer Service & Support', there are 'Customer Support International', 'Customer Support North America', and 'Installation & Repair Services' roles. Under 'SVP, Human Resources', there is an 'Add Role' button. Under 'SVP, Sales & Marketing', there are 'VP, International Sales' and 'VP, Marketing' roles. Each role node has 'Edit', 'Delete', and 'Assign' buttons.

### 3.3 Users:

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records.

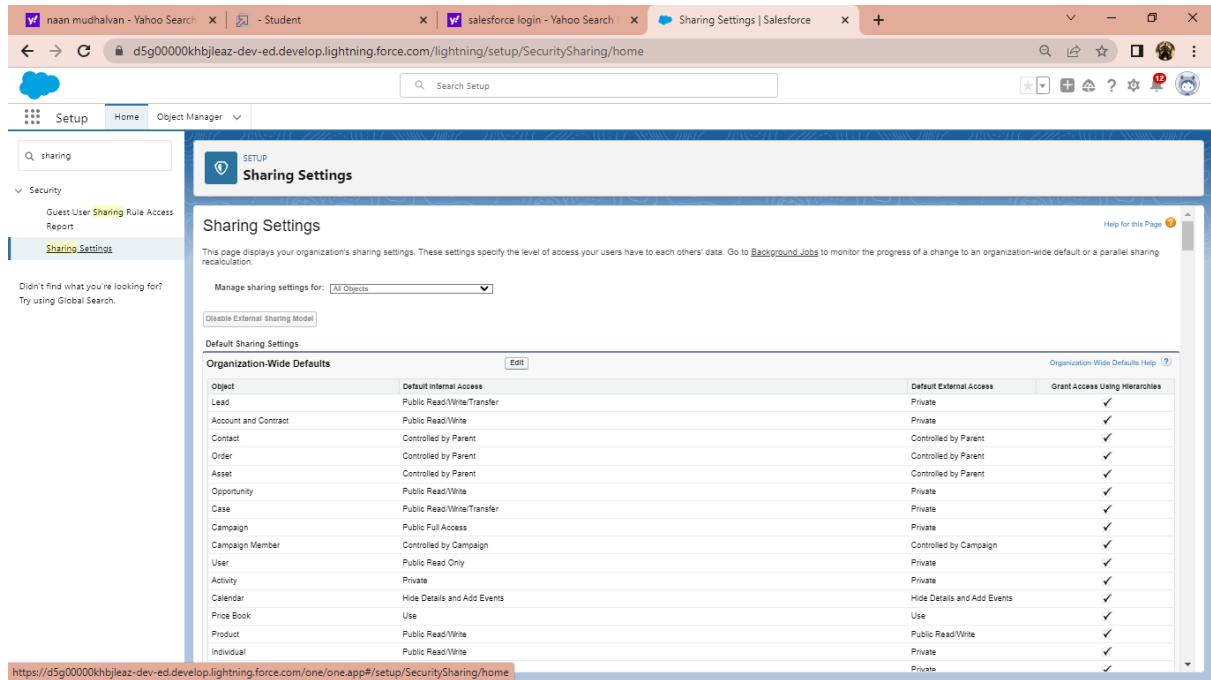
### Creating A Users:

The screenshot shows the 'Users' setup page in Salesforce. The left sidebar has 'Users' selected under 'User Management Settings'. The main area is titled 'New User' and shows a 'User Edit' form. The 'General Information' section contains fields for First Name (vicky), Last Name (y), Alias (vy), Email (ramesh0820@gmail.com), Username (ramesh0820@754123gmail), Nickname (vicky), Title ( ), Company ( ), Department ( ), and Division ( ). To the right of these fields are sections for 'Role' (set to 'owner'), 'User License' (set to 'Salesforce Integration'), and various checkboxes for 'Active', 'Marketing User', 'Office User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Data.com User Type' (set to 'None'), 'Data.com Monthly Addition Limit' (set to 'Default Limit (300)'), 'Accessibility Mode (Classic Only)', 'High-Contrast Palette on Charts', 'Load Lightning Pages White Scrolling', 'Debug Mode', 'Quick Access Menu', 'Salesforce CRM Content User', and 'Receive Salesforce CRM Content Email Alerts'.

## 3.4 User Adoption & Approval

It is the interaction with database and their records.

### Create Permission Sets:



The screenshot shows the Salesforce Sharing Settings page. The URL in the browser is <https://d5g0000khbjleaz-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home>. The page title is "Sharing Settings". The left sidebar shows "Sharing Settings" under the "Security" category. The main content area displays "Sharing Settings" with a note: "This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalibration." A dropdown menu "Manage sharing settings for:" is set to "All Objects". Below this is a table titled "Default Sharing Settings" with two tabs: "Organization-Wide Defaults" (selected) and "Organization-Wide Defaults Help". The table lists various objects and their sharing settings. The columns are "Object", "Default Internal Access", "Default External Access", and "Grant Access Using Hierarchies".

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓
Individual	Public Read/Write	Private	✓

Verify your identity in Salesforce - Student | Recently Viewed | Buyer | Salesforce | Permission Sets | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Access Policies

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets Edit | Delete | Create New View

New

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	Permission Set Label	Description	License
Clone	Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager Permission Set One Seat
Clone	C360 High Scale Flow Integration User	Allows integration user to access features specific to C3...	Cloud Integration User
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User
Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User
Del   Clone	Experience Profile Manager	Salesforce	
Clone	Facility Manager	Lets users create, read, edit, and delete locations, subloc...	Facility Manager
Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service m...	Field Service Mobile
Del   Clone	Manager12		

1-25 of 32 0 Selected

Help for this Page

https://arunkumardeveloper-dev-ed.develop.lightning.force.com/one/one.app#/setup/PermSets/home

Verify your identity in Salesforce - Student | Recently Viewed | Buyer | Salesforce | Permission Sets | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Access Policies

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

Permission Set Create

Enter permission set information

Label: P1

API Name: P1

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

-Choose -None- if you plan to assign this permission set to multiple users with different user and permission set licenses.  
-Choose a specific user license if you want users with only one license type to use this permission set.  
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License: -None-

Verify your identity in Salesforce - Student Recently Viewed | Buyer | Salesforce Permission Sets | Salesforce

arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOP5j000008QkCp%3FsfclFrameOrigin%3Dhttps%25A%252F... 🔍 ⭐ 🌐 🌐 🌐 🌐 🌐 🌐 🌐 🌐 🌐

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar is collapsed, and the main area displays the 'Permission Set Overview' for 'P1'. The overview includes fields for Description, License, Session Activation Required, API Name (P1), Namespace Prefix, Created By (Arunkumar\_R), and Last Modified By (Arunkumar\_R). Below the overview, there are sections for 'Apps' and various app-related settings like Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, and Visualforce Page Access.

Verify your identity in Salesforce - Student Recently Viewed | Buyer | Salesforce Permission Sets | Salesforce

arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOP5j000008QkCp%3Fsf3%3DEntityPermissions%26isdp%3D... 🔍 ⭐ 🌐 🌐 🌐 🌐 🌐 🌐 🌐 🌐 🌐

This screenshot shows the 'Object Settings' tab for the permission set 'P1'. It lists various objects and their corresponding permissions. The table includes columns for Object Name, Object API Name, Object Permissions, Total Fields, and Tab Settings. Objects listed include Accounts, AI Insight Reasons, AI Record Insights, Alternative Payment Methods, API Anomaly Event Stores, App Analytics Query Requests, Application Usage Assignments, Appointment Categories, Appointment Invitations, Appointment Invites, Appointment Schedule Aggregates, Appointment Schedule Logs, Appointment Topic Time Slots, and Asset Actions. Most objects have 'No Access' permissions.

Object Name	Object API Name	Object Permissions	Total Fields	Tab Settings
Accounts	Account	No Access	40	--
AI Insight Reasons	AllInsightReason	No Access	--	--
AI Record Insights	AIRecordInsight	No Access	--	--
Alternative Payment Methods	AlternativePaymentMethod	No Access	27	--
API Anomaly Event Stores	ApiAnomalyEventStore	No Access	14	--
App Analytics Query Requests	AppAnalyticsQueryRequest	No Access	--	--
Application Usage Assignments	AppUsageAssignment	No Access	--	--
Appointment Categories	AppointmentCategory	No Access	3	--
Appointment Invitations	AppointmentInvitation	No Access	17	--
Appointment Invites	AppointmentInvite	--	4	--
Appointment Schedule Aggregates	AppointmentScheduleAggr	No Access	--	--
Appointment Schedule Logs	AppointmentScheduleLog	No Access	--	--
Appointment Topic Time Slots	AppointmentTopicTimeSlot	No Access	6	--
Asset Actions	AssetAction	No Access	30	--

The screenshots show the Salesforce Setup interface for managing Permission Sets. In the left sidebar, 'Permission Sets' is selected under 'Users'. The main area displays the 'Permission Set' page for 'P1'. The 'Accounts' tab is selected under 'Object Settings'. The 'Object Permissions' section shows a table with permission names and checkboxes. The 'Field Permissions' section shows a table for fields like Account Name, Account Number, and Account Owner with checkboxes for Read Access and Edit Access.

Object	Action	Enabled
Read	<input type="checkbox"/>	
Create	<input type="checkbox"/>	
Edit	<input type="checkbox"/>	
Delete	<input type="checkbox"/>	
View All	<input type="checkbox"/>	
Modify All	<input type="checkbox"/>	

Field Name	Field API Name	Read Access	Edit Access
Account Name	Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	AccountNumber	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	OwnerId	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## CHAPTER-4

### AUTOMATION

#### 4.1 APEX:

Apex is a strongly typed, object-oriented programming language that allows developers to execute flow and transaction control statements on the Lightning platform server in conjunction with calls to the Lightning Platform API. Using syntax that looks like Java and acts like database stored procedures, Apex

enables developers to add business logic to most system events, including button clicks, related record updates, and Visualforce pages. Apex code can be initiated by Web service requests and from triggers on objects.

```

public class ConsumerRecord {
    public static void sendEmailNotification (List<consumer__c> con) {
        for(consumer__c con) {
            Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
            email.setToAddresses(new List<String>{con.email__c});
            email.setSubject('Welcome to our company');
            email.setPlainTextBody('Dear ' + con.name + ',\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.\nWe 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.\nSo why taking a step back, take a leap of faith and shop with us more, while we provide with the valuable products and offers.\nThankyou for buying ' + con.products_bought__c + '. Here are some of the products that are brought by the customers who similarly bought products like this.\n');
            Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
        }
    }
}

```

```

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

```

## CHAPTER-5

## **REPORTS & DASHBOARD**

### **5.1 Reports**

A Salesforce report is a list of data generated based on filter criteria. Salesforce Reports helped us predict trends and gives us the advantage to increase profits. The report builder provides a drag-and-drop interface to easily build and customize your reports.

**[View Report](#)**

Salesforce - Student | DNI7OCGrX6-92PIKcuvY4liE | Recently Viewed | Buyer | Reports | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

Gas Filling Station Suppliers Gas Stations Buyer Fuel details Reports

Reports Recent 0 items

RECENT

- Created by Me
- Private Reports
- Public Reports
- All Reports

FOLDERS

- All Folders

CREATED BY ME

- Created by Me
- Shared with Me

FAVORITES

- All Favorites

Search...  Search recent reports...  New Report  New Folder



Recent reports appear here  
Go to All Reports to see what's available.  
[View All Reports](#)

Salesforce - Student | DNI7OCGrX6-92PIKcuvY4liE | Recently Viewed | Buyer | Reports | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

Gas Filling Station Suppliers Gas Stations Buyer Fuel details Reports

Reports Recent 0 items

RECENT

- Created by Me
- Private Reports
- Public Reports
- All Reports

FOLDERS

- All Folders

CREATED BY ME

- Created by Me
- Shared with Me

FAVORITES

- All Favorites

Search...  Search recent reports...  New Report  New Folder



Recent reports appear here  
Go to All Reports to see what's available.  
[View All Reports](#)

The screenshot shows the Salesforce Reports page for a 'Gas Filling Station' account. On the left, a sidebar lists report categories: Recent, REPORTS (Recent), FOLDERS (All Folders), and FAVORITES (All Favorites). A modal window titled 'Create folder' is open, prompting for a 'Folder Label' (Fuel Estimation) and a 'Folder Unique Name' (FuelEstimation). The main content area displays a message: 'Recent reports appear here. Go to All Reports to see what's available.' with a 'View All Reports' link.

The screenshot shows the same Salesforce Reports page after creating a folder. The 'Recent' section now lists one item: 'Sample Flow Report: Screen Flows'. The report details are: Report Name: Sample Flow Report: Screen Flows, Description: Which flows run, what's the status of each interview, and how long do users take to complete the screens?, Folder: Public Reports, Created By: Automated Process, Created On: 1/10/2023, 10:37 am. The sidebar remains the same as in the previous screenshot.

Report Name	Description	Folder	Created By	Created On
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	1/10/2023, 10:37 am

Salesforce screenshot showing the Reports section for 'Gas Filling Station'. The 'All Folders' view is displayed, listing 6 items. A context menu is open over the last item, 'Fuel Estimation', with options: Favorite, Share, Rename, and Delete.

REPORTS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	Einstein Bot Reports	Automated Process	1/10/2023, 10:37 am	Automated Process	1/10/2023, 10:37 am
Created by Me	Einstein Bot Reports Spring '23	Automated Process	1/10/2023, 10:37 am	Automated Process	1/10/2023, 10:37 am
Private Reports	Einstein Bot Reports Summer '23	Automated Process	1/10/2023, 10:37 am	Automated Process	1/10/2023, 10:37 am
Public Reports	Einstein Bot Reports Summer '22	Automated Process	1/10/2023, 10:37 am	Automated Process	1/10/2023, 10:37 am
All Reports	Einstein Bot Reports Winter '23	Automated Process	1/10/2023, 10:37 am	Automated Process	1/10/2023, 10:37 am
FOLDERS	Fuel Estimation	Arun Kumar R	17/10/2023, 9:12 pm	Arun Kumar R	17/10/2023, 9:12 pm

Salesforce screenshot showing the 'Share folder' dialog box. The dialog is titled 'Share folder' and contains the following fields:

- Share With:
  - Roles: Manager
  - Names: Manager
  - Access: View
- Share: A button to initiate sharing.
- Who Can Access:
  - Search bar: Arunkumar R
  - Users: Arunkumar R
  - Manage: Manage button
- Done: A blue 'Done' button at the bottom right.

Salesforce tabs: Verify your identity in Salesforce, - Student, Reports | Salesforce, Buyer | Salesforce, Recently Viewed | Buyer | Salesfo

URL: arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/o/Buyer\_\_c/list?filterName=Recent

Gas Filling Station navigation bar: Suppliers, Gas Stations, Buyer (selected), Fuel details, Reports, Analytics

Buyer Recently Viewed list:

Rank	Buyer
1	Buyer-010
2	Buyer-009
3	Buyer-008
4	Buyer-007
5	Buyer-006
6	Buyer-005
7	Buyer-004
8	Buyer-003
9	Buyer-002
10	Buyer-001

Salesforce tabs: Verify your identity in Salesforce, - Student, Reports | Salesforce

URL: arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

Gas Filling Station navigation bar: Suppliers, Gas Stations, Buyer (selected), Fuel details, Reports (selected), Analytics

Reports Recent list:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	1/10/2023, 10:37 am	

Left sidebar categories: Reports, Recent, 1 item, REPORTS, Recent, Created by Me, Private Reports, Public Reports, All Reports, FOLDERS, All Folders, Created by Me, Shared with Me, FAVORITES, All Favorites.

Verify your identity in Salesforce - Student Report Builder | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJyZXvvnRzOnJlcG9ydE1aWxkZXIiLCJhdHRyaWJdGVzjp7InJlY29yZEI... A

Gas Filling Station Suppliers Gas Stations Buyer Fuel details \* Reports \* Analytics

Create Report

**Category**

Recently Used

All

- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contracts and Orders
- Price Books, Products and

Select a Report Type

Report Type Name Category

Suppliers with Fuel details and Gas Stations	Standard
Gas Stations	Standard
Gas Stations with Buyer	Standard
Gas Stations with Fuel details and Suppliers	Standard

arunkumardeveloper-dev-ed.develop.lightning.force.com/..lightningReportApp... Verify your identity in Salesforce - Student GlajdrEyhMUo8lrqRQm3xtkZIC Report Builder | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJyZXvvnRzOnJlcG9ydE1aWxkZXIiLCJhdHRyaWJdGVzjp7InJlY29yZEI... A

Gas Filling Station Suppliers Gas Stations Buyer Fuel details \* Reports \* Analytics

**REPORT** New Gas Stations with Buyer Report **Gas Stations with Buyer**

Fields

Outline Filters 1

To see the latest edits, refresh the preview. Refresh

Update Preview Automatically

	Gas Station: Gas Station	Buyer: Buyer
1	Gas-002	Buyer-001
2	Gas-001	Buyer-004
3	Gas-003	Buyer-010
4	Gas-002	Buyer-006
5	Gas-001	Buyer-007
6	Gas-001	Buyer-002
7	Gas-003	Buyer-003
8	Gas-003	Buyer-005
9	Gas-001	Buyer-008
10	Gas-002	Buyer-009

Row Counts Detail Rows Subtotals Grand Total Conditional Formatting

Screenshot of the Salesforce Report Builder interface showing the "Add Conditional Formatting Rule" dialog.

The dialog title is "Add Conditional Formatting Rule".

Under "Apply Conditional Formatting to", the field "Sum of Amount Paid" is selected.

The "Range" section contains the following rules:

Range	Background Color
<= 1000	Red
> 1,000 to 5000	Orange
> 5,000	Green

Buttons at the bottom right include "Cancel" and "Done".

Screenshot of the Salesforce Report Builder interface showing the "Conditional Formatting Rules" dialog.

The dialog title is "Conditional Formatting Rules".

A single rule is listed: "Sum of Amount Paid" with the condition "1,000 | 5,000".

Buttons at the bottom right include "Cancel" and "Apply".

Screenshot of the Salesforce Report Builder interface showing the "Save Report" dialog box.

The dialog box contains the following fields:

- Report Name: Amount range
- Report Unique Name: Amount\_range\_UeZ
- Report Description: Fuel Estimation
- Folder: Fuel Estimation

Buttons at the bottom right of the dialog box are "Cancel" and "Save".

The background shows the Report Builder interface with a report titled "New Gas Stations with Buyer Report" and a sidebar labeled "Fields".

At the bottom of the screen, a success message is displayed: "Report 'Amount range' was saved".

The screenshot shows the Report Builder interface on a Salesforce page. The report title is "Gas Stations with Buyer". The report structure is defined by groups and columns. The main data table has four columns: "Fuel Available in bunk", "Fuel filled in vehicle", "Customer Name", and "Amount Paid". The data is grouped by "Fuel Available in bunk" (with subtotals for -17.00 and -9.00) and "Customer Name" (with subtotals for Mahesh R, Ajith s, Ram S, Gokul charan, Hari N, Boopathi R, Jaganthan N, Aravindhan V, arun kumar, Arunkumar R). The total row shows a grand total of 4,446.00.

Fuel Available in bunk	Fuel filled in vehicle	Customer Name	Amount Paid
-17.00 (3)		6 Mahesh R	888.00
		3 Ajith s	444.00
		8 Ram S	1,184.00
<b>Subtotal</b>		17	<b>2,516.00</b>
-9.00 (3)		2 Gokul charan	300.00
		4 Hari N	600.00
		3 Boopathi R	450.00
<b>Subtotal</b>		9	<b>1,350.00</b>
-5.00 (4)		2 Jaganthan N	232.00
		1 Aravindhan V	116.00
		1 arun kumar	116.00
		1 Arunkumar R	116.00
<b>Subtotal</b>		5	<b>580.00</b>
<b>Total (10)</b>		31	<b>4,446.00</b>

## 5.2 Dashboard

A dashboard provides an interactive visual display of key metrics and trends. Multiple dashboard components can be shown together on a single dashboard layout, creating rich visual displays of multiple reports that have a common theme.

[View Dashboard](#)

Salesforce Dashboard - Gas Filling Station

Verify your identity in Salesforce - Student - Dashboards | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru

Gas Filling Station Dashboards Recent 0 items

DASHBOARDS Recent

- Created by Me
- Private Dashboards
- All Dashboards

FOLDERS All Folders

- Created by Me
- Shared with Me

FAVORITES All Favorites

Recent dashboards appear here  
Go to All Dashboards to see what's available.  
[View All Dashboards](#)



Salesforce Dashboard - Gas Filling Station

Verify your identity in Salesforce - Student - Dashboards | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru

Gas Filling Station Dashboards Recent 0 items

DASHBOARDS Recent

- Created by Me
- Private Dashboards
- All Dashboards

FOLDERS All Folders

- Created by Me
- Shared with Me

FAVORITES All Favorites

Create folder

\*Folder Label: Amount estimation dashboard

\*Folder Unique Name: Amountestimationdashboard

[Cancel](#) [Save](#)

Recent dashboards appear here  
Go to All Dashboards to see what's available.  
[View All Dashboards](#)

The screenshot shows two views of the Salesforce Analytics interface. The top view displays a success message: "The folder named Amount estimation dashboard was created." The bottom view shows the "Browse" page for the "Amount estimation dashboard". The sidebar on the left includes "Analytics", "Home", "Browse" (which is selected), and "Favorites". The main area shows a search bar, filter buttons for "All Items", "Dashboards", and "Folders", and four filter boxes for "Created By", "Created On", "Last Modified By", and "Last Modified On", each set to "Anybody" and "Any Date". Below this is a section titled "Asset Results" which displays a message: "No items to display. Try different filters to see more results." and a "Learn More" link.

Salesforce screenshot showing the 'Dashboards' page. The sidebar on the left lists categories: Dashboards, All Folders, DASHBOARDS, FOLDERS, and All Favorites. The main area shows a table of dashboards. One row is selected, showing details: Name: Amount estimation dashboard, Created By: Arunkumar R, Created On: 17/10/2023, 9:46 pm, Last Modified By: Arunkumar R, Last Modified Date: 17/10/2023, 9:46 pm.

Name	Created By	Created On	Last Modified By	Last Modified Date
Amount estimation dashboard	Arun Kumar R	17/10/2023, 9:46 pm	Arun Kumar R	17/10/2023, 9:46 pm

Salesforce screenshot showing the 'Share folder' dialog box. The dialog has a title 'Share folder'. It contains a message: 'These sharing settings apply to all subfolders in this folder.' Under 'Share With', there is a 'Roles' dropdown set to 'Names'. A search bar shows 'Manager' with a delete button. Below this is a 'Share' button. Under 'Who Can Access', there is a search bar and a list showing 'Arun Kumar R' under 'Users'. A 'Manage' button is next to the user list. At the bottom right is a 'Done' button.

Verify your identity in Salesforce - Student Dashboards | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=userFolders

Gas Filling Station Suppliers Gas Stations Buyer Fuel details \* Report Builder \* Analytics \* Dashboards

Cloud Search... ★ + ? ⚙️ 📡

Dashboards All Folders 1 item

DASHBOARDS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	Amount estimation dashboard	Arun Kumar R	17/10/2023, 9:46 pm	Arun Kumar R	17/10/2023, 9:46 pm

Created by Me  
Private Dashboards  
All Dashboards

FOLDERS

All Folders

Created by Me  
Shared with Me

FAVORITES

All Favorites

javascript:void(0);

Verify your identity in Salesforce - Student New Dashboard | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOjkzXNrdG9wRGFzaGlvYXJkczpkYXNoYm9hcmQjLCJhdHRyaWJ1dGVzIj... ★ + ? ⚙️ 📡

Gas Filling Station Suppliers Gas Stations Buyer Fuel details \* Report Builder \* Analytics \* Dashboards

Cloud Search... + Component + Filter Save Done

New Dashboard

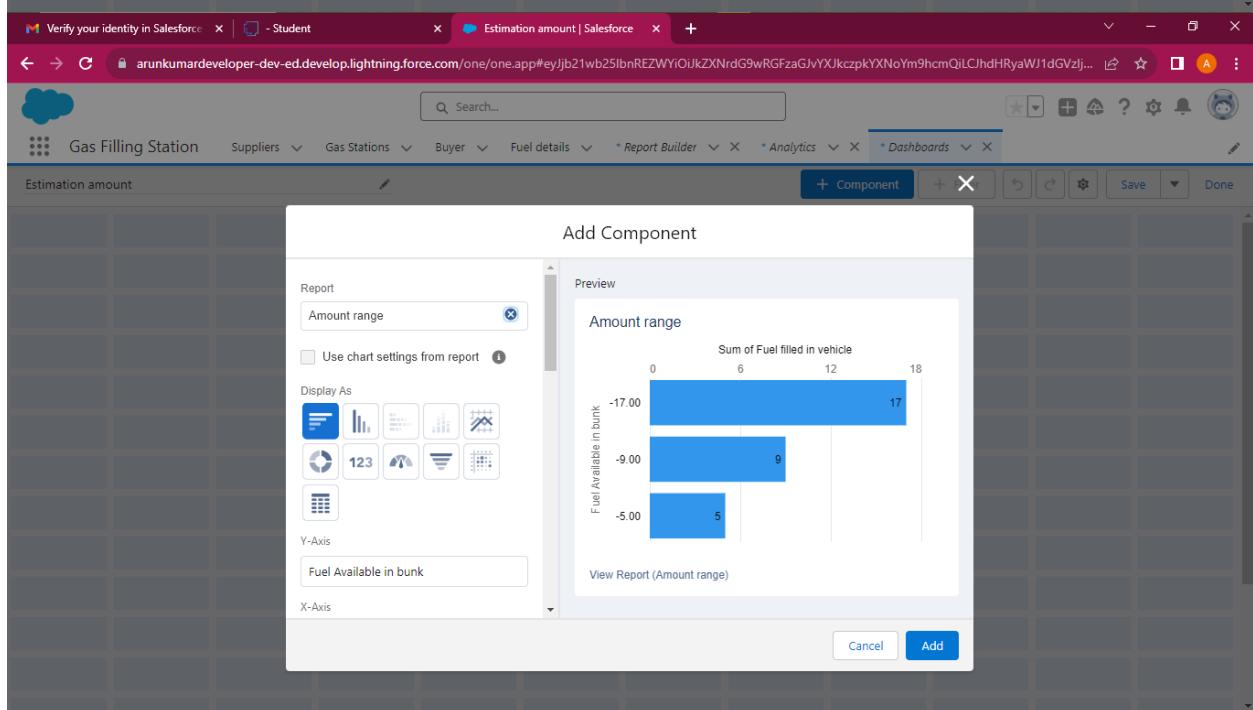
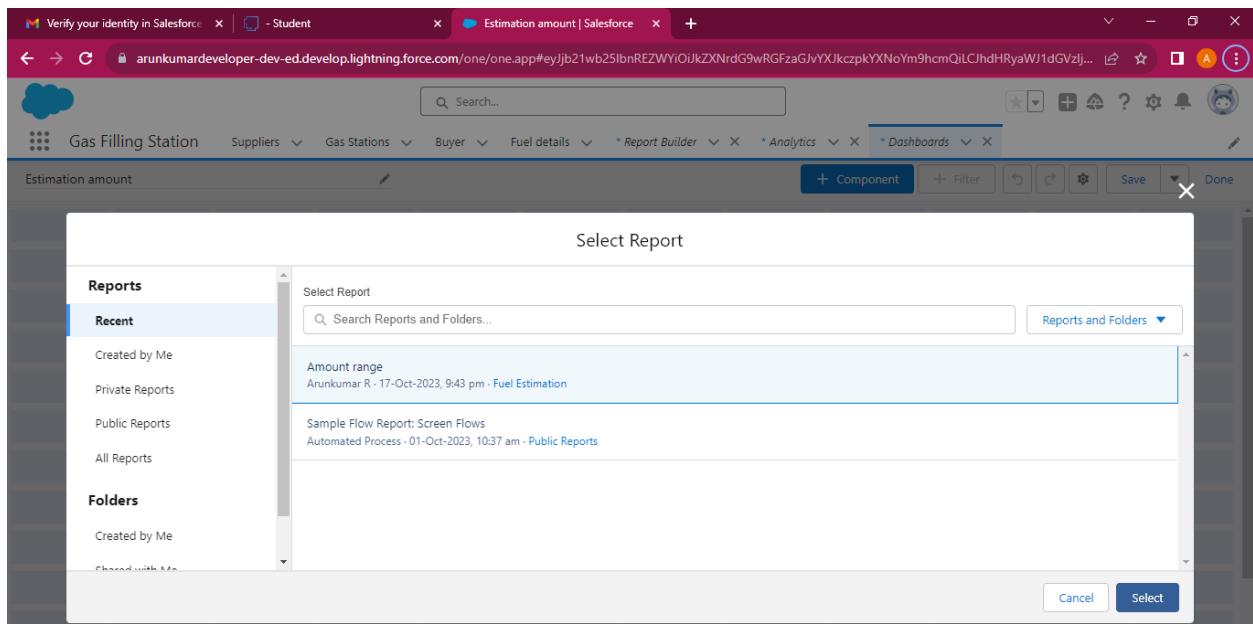
\*Name

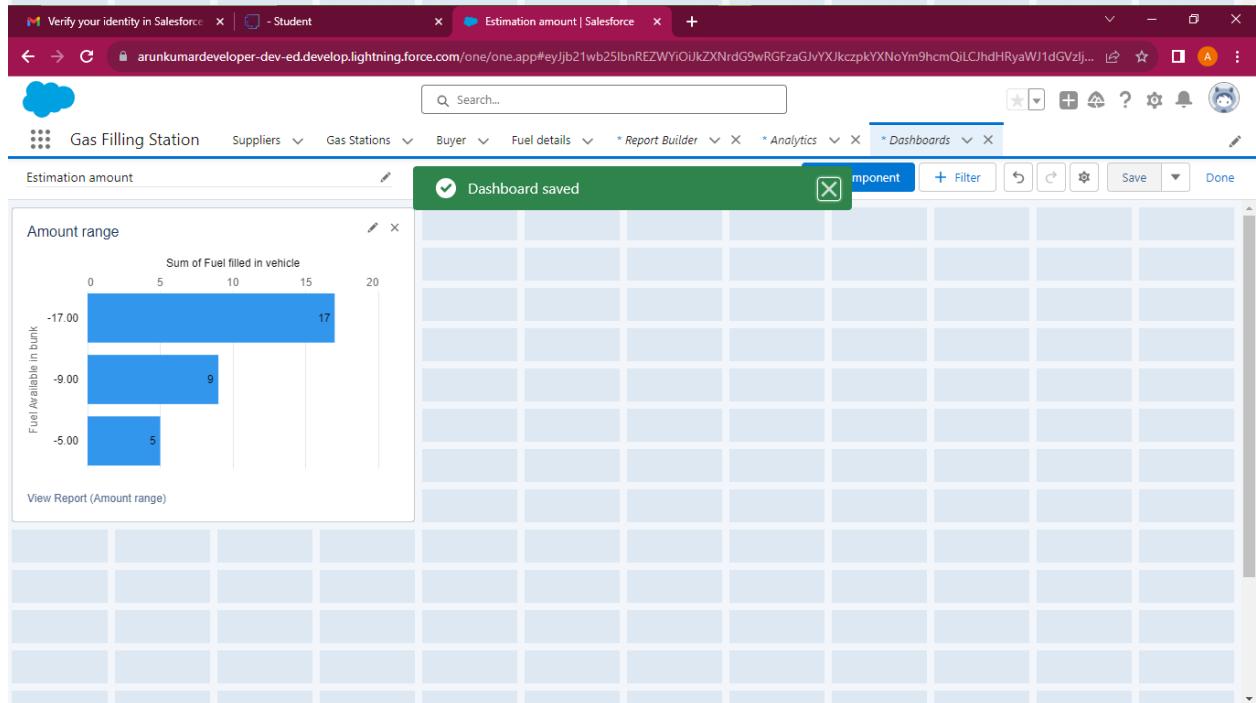
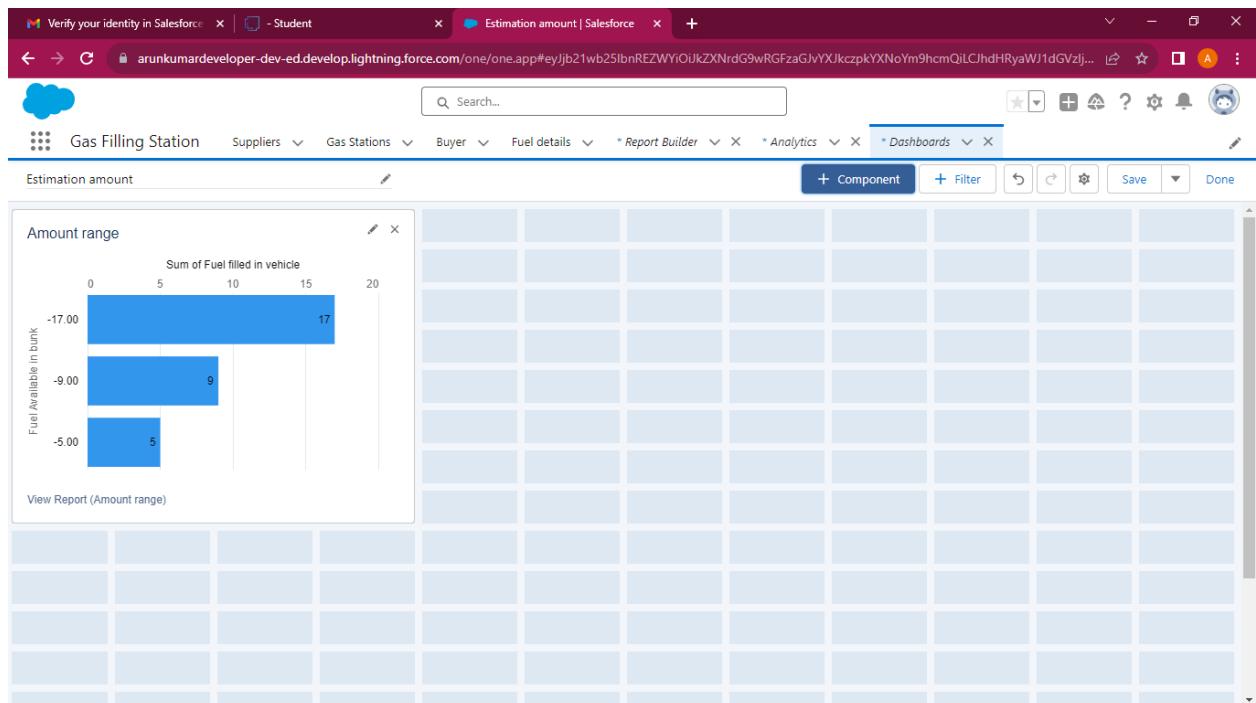
Description

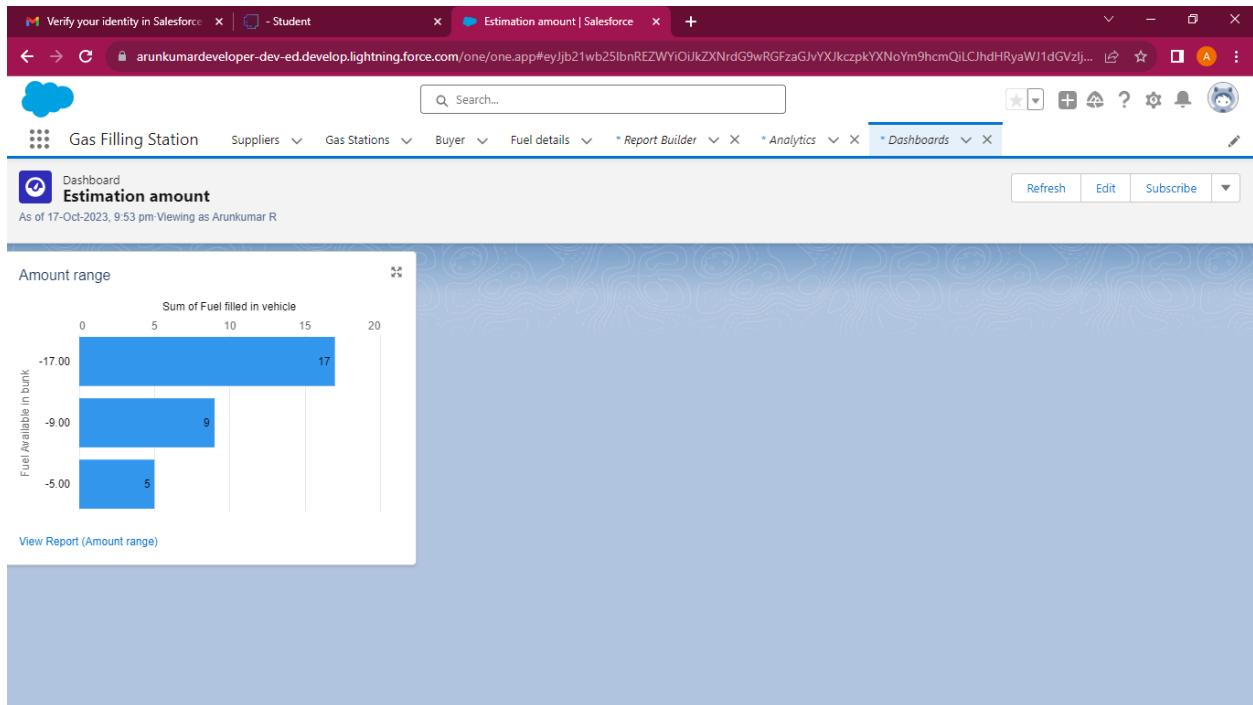
Folder  
 Select Folder

Cancel Create

The screenshot shows the Salesforce Lightning Experience interface. At the top, there are several tabs: 'Verify your identity in Salesforce', '- Student', 'Estimation amount | Salesforce', and a new tab icon. Below the tabs is a header bar with a blue cloud icon, a search bar containing 'Search...', and various navigation links: 'Gas Filling Station', 'Suppliers', 'Gas Stations', 'Buyer', 'Fuel details', 'Report Builder', 'Analytics', and 'Dashboards'. The main area is a large, empty grid representing a dashboard. At the bottom of the screen, there is a footer bar with the same tabs and icons as the top.







## CHAPTER-6

### CONCLUSION

Implementing a Customer Relationship Management (CRM) system for result tracking of a candidate's internal marks can be a transformative and highly beneficial step for educational institutions. In conclusion, this technology-driven approach offers numerous advantages for both educational institutions and candidates alike.

First and foremost, a CRM system streamlines the process of tracking a candidate's internal marks. It centralizes and organizes data, making it easily

accessible to relevant stakeholders, such as instructors, administrators, and candidates themselves. This centralized system enhances efficiency, reduces administrative burdens, and minimizes errors, ensuring the accuracy of mark tracking.

Moreover, a CRM system provides valuable insights into a candidate's academic journey. It allows educational institutions to analyze data over time, identify trends, and detect areas where additional support may be required. This data-driven approach can help educators tailor their teaching methods to meet individual candidate needs, ultimately improving the learning experience.

For candidates, CRM implementation enhances transparency and engagement. They can access their internal marks, performance feedback, and progress reports in real-time. This access empowers candidates to take ownership of their education, set goals, and track their performance, fostering a sense of responsibility and accountability.

Additionally, a CRM system supports effective communication between educational institutions and candidates. Notifications, alerts, and reminders can be automated, ensuring candidates stay informed about important deadlines, examinations, and academic events. Open lines of communication also allow candidates to seek assistance when needed, fostering a supportive learning environment.

In conclusion, implementing a CRM system for result tracking in an educational setting is a strategic move that benefits educational institutions and candidates alike. It streamlines administrative processes, provides valuable insights into academic performance, enhances transparency and engagement, and supports effective communication. By leveraging this technology, educational institutions can improve the overall learning experience, helping candidates succeed in their academic journey.

## **CHAPTER-7**

### **PROJECT DEMONSTRATION**

**GitHub:**

[https://github.com/9786643/Nitheeshkumar\\_BE0BC790571D73F87B34A349C9B8F18A](https://github.com/9786643/Nitheeshkumar_BE0BC790571D73F87B34A349C9B8F18A)

**Demo link:**

<https://drive.google.com/file/d/1m9XeQMs8H3gAn4N5jdCiW2oEBFnbpbuB/view?usp=drivesdk>