A CRM APPLICATION FOR WHOLESALE RICE MILL

NAAN MUDHALVAN

PROJECT REPORT

Submitted by

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In partial fulfillment of the award of the degree of

BACHELOR OF ENGINEERING
in
COMPUTER SCIENCE AND ENGINEERING

AVS ENGINEERING COLLEGE

AMMAPET, SALEM- 636 003

ANNA UNIVERSITY :: CHENNAI 600 025

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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Assistant Professor,	Assistant Professor,
Department of CSE,	Department of CSE,
AVS Engineering College,	AVS Engineering College,
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SPOC	**HEAD OF THE DEPARTMENT**

ACKNOWLEDGEMENT

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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

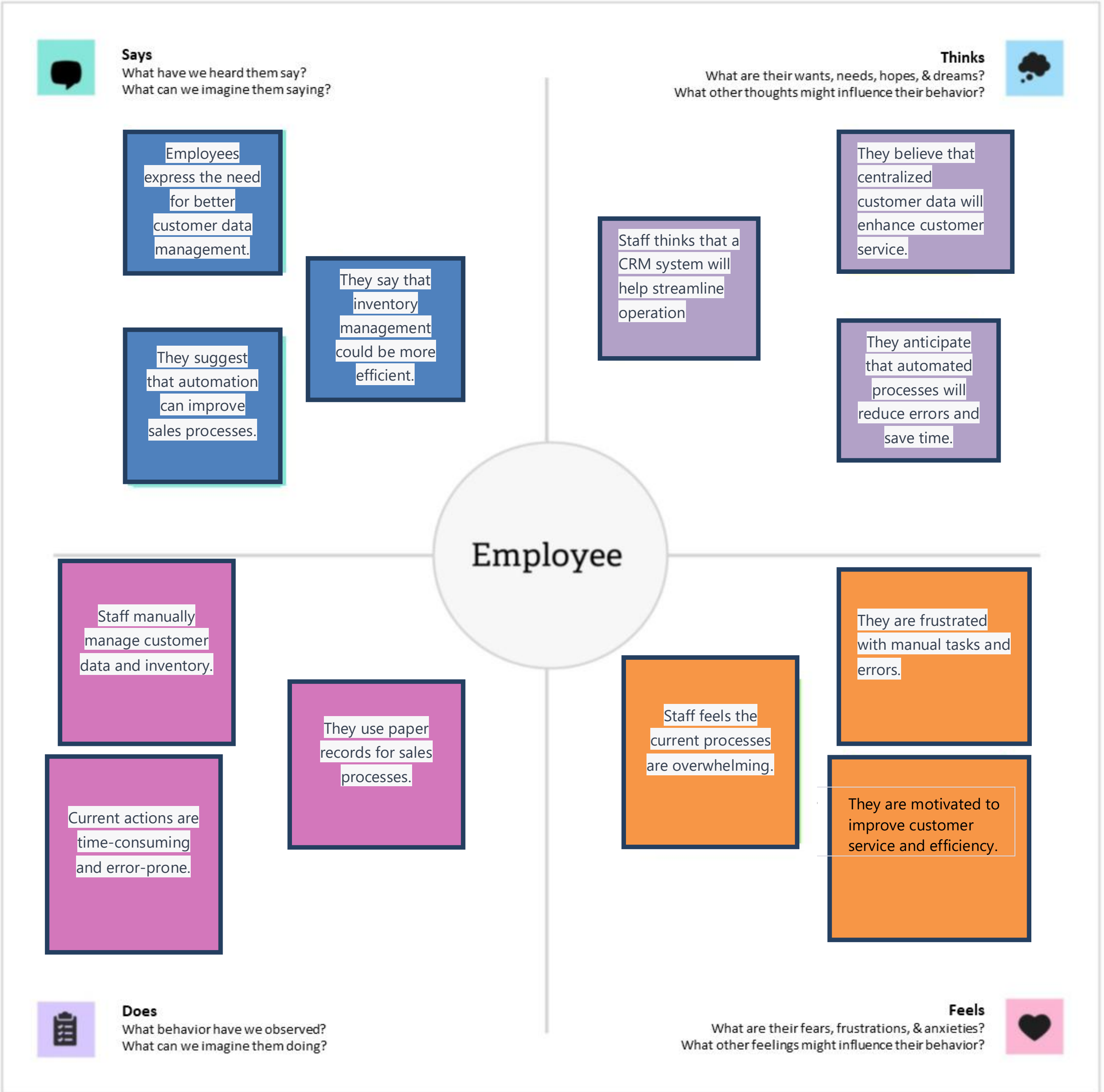
Problem for	Trying to	But	Which makes
Employee	I'm an employee at our gas filling station, and I'm striving to effectively manage customer records, streamline fuel orders, and implement loyalty programs for our diverse customer base.	However, the manual and time-intensive nature of these tasks, coupled 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 helps 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.


Says
What have we heard them say?
What can we imagine them saying?
Employees express the need for better customer data management.
They say that inventory management could be more efficient.
They suggest that automation can improve sales processes.
Thinks
What are their wants, needs, hopes, & dreams?
What other thoughts might influence their behavior?
They believe that centralized customer data will enhance customer service.
Staff thinks that a CRM system will help streamline operation
They anticipate that automated processes will reduce errors and save time.
Employee
Staff manually manage customer data and inventory.
They use paper records for sales processes.
Current actions are time-consuming and error-prone.
They are frustrated with manual tasks and errors.
Staff feels the current processes are overwhelming.
They are motivated to improve customer service and efficiency.
Does
What behavior have we observed?
What can we imagine them doing?
Feels
What are their fears, frustrations, & anxieties?
What other feelings might influence their behavior?

1.5 Empathy Map Canvas

S. No	Parameter	Description
1.	**Says**	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.	**Thinks**	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.	**Pains**	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.	**Gains**	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..	**Feels**	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.	**Does**	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
Customer Data Management	The CRM system should allow for the centralized management of customer information, including contact details, purchase history, and preferences.
Personalized Customer Service	The system should support the ability to create and manage customer profiles, enabling us to provide personalized services, special promotions, and targeted offers.
Inventory Management	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..
Automated Sales Processes	The CRM system should facilitate automated sales processes, including order processing and payment, to ensure a smooth and error-free customer experience.
Reporting and Analytics:	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.
Integration Capabilities	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

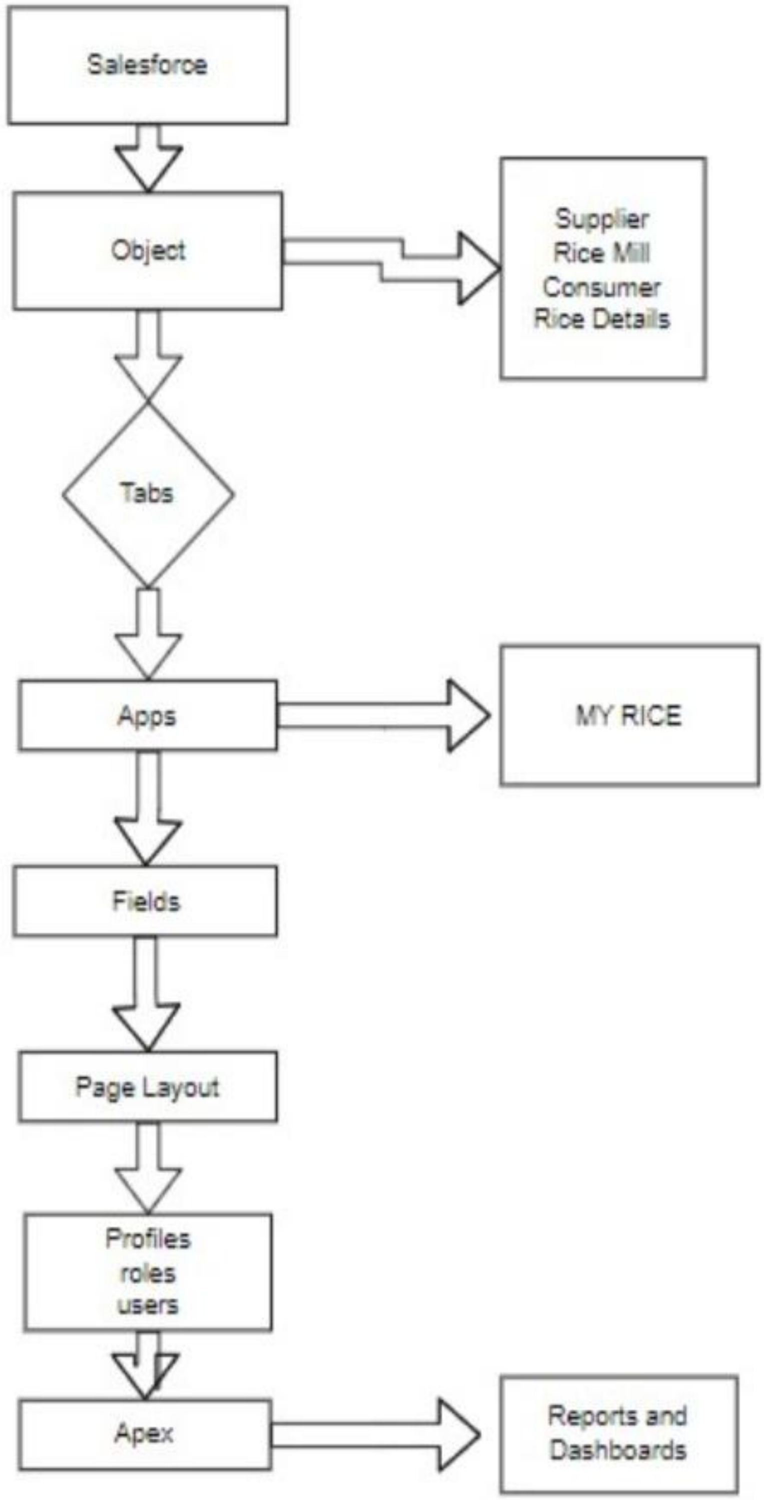
Requirement	Description
Scalability:	The CRM system should be scalable to accommodate the potential growth of our business. It should handle an increasing volume of customer data and transactions without performance degradation.

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

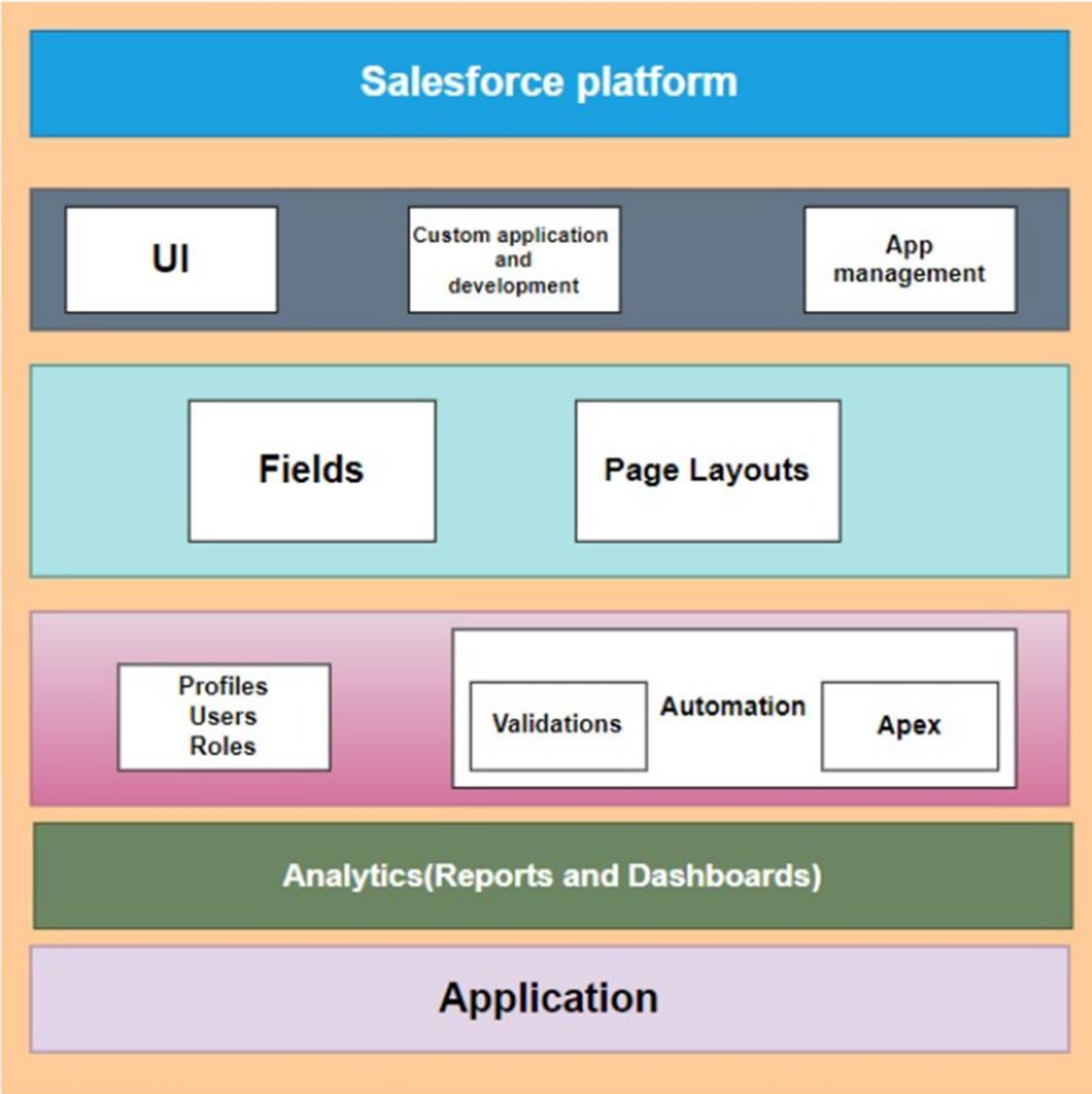
1.7 Project Road Map

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.


Salesforce
Object
Supplier
Rice Mill
Consumer
Rice Details
Tabs
Apps
MY RICE
Fields
Page Layout
Profiles
roles
users
Apex
Reports and
Dashboards

1.7.2 Technical Architecture

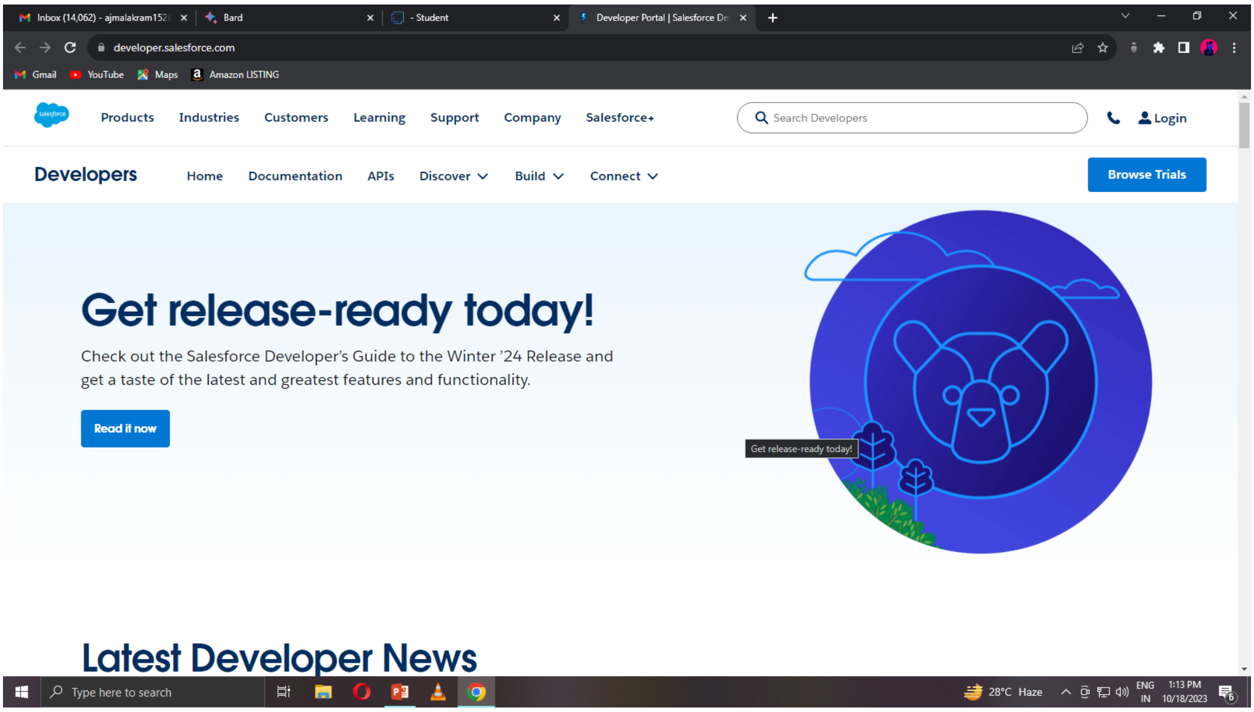


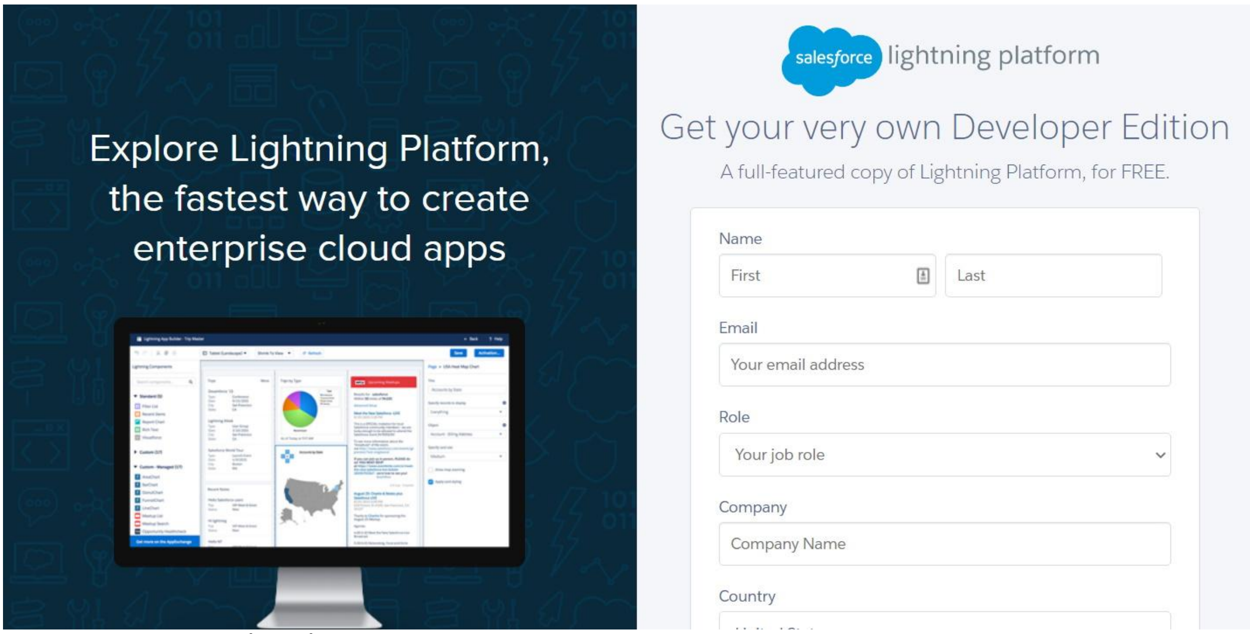
CHAPTER-2

PREPARATION DATA MODELING

2.1 Salesforce Developer Org

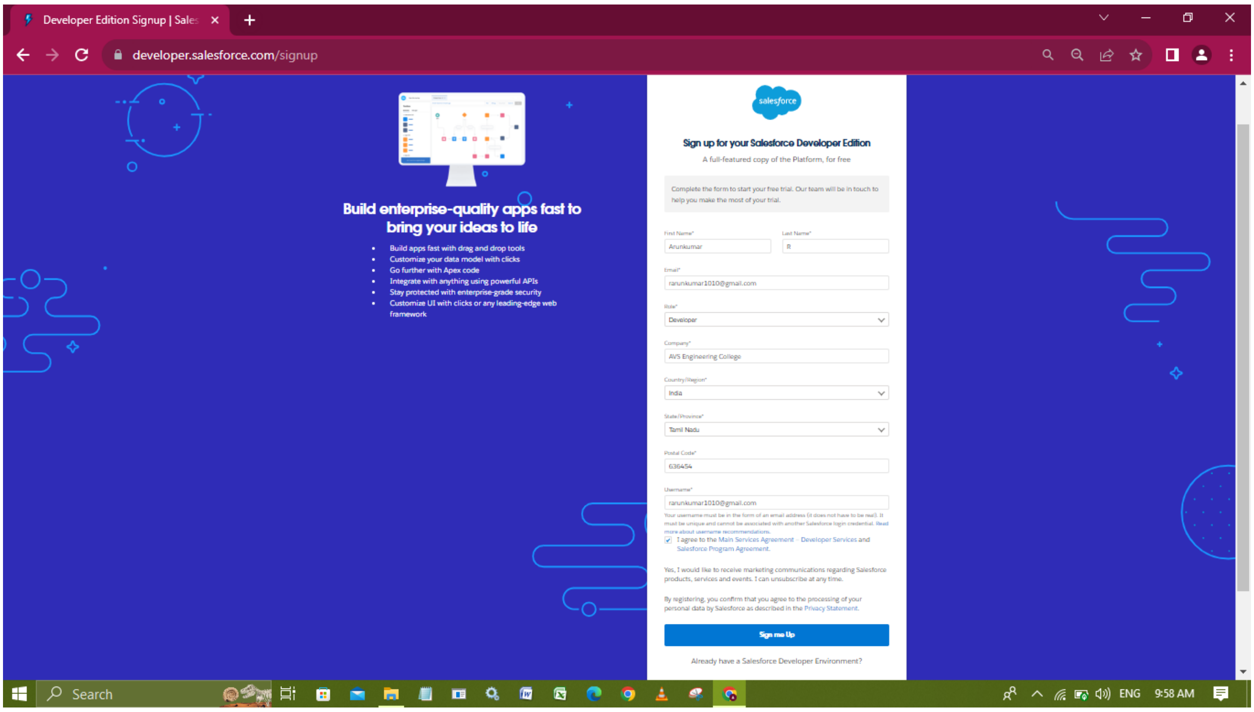
In Salesforce, a Developer Sign Up or Developer Edition is a special type of Salesforce environment that is primarily used for development, testing, and learning purposes.

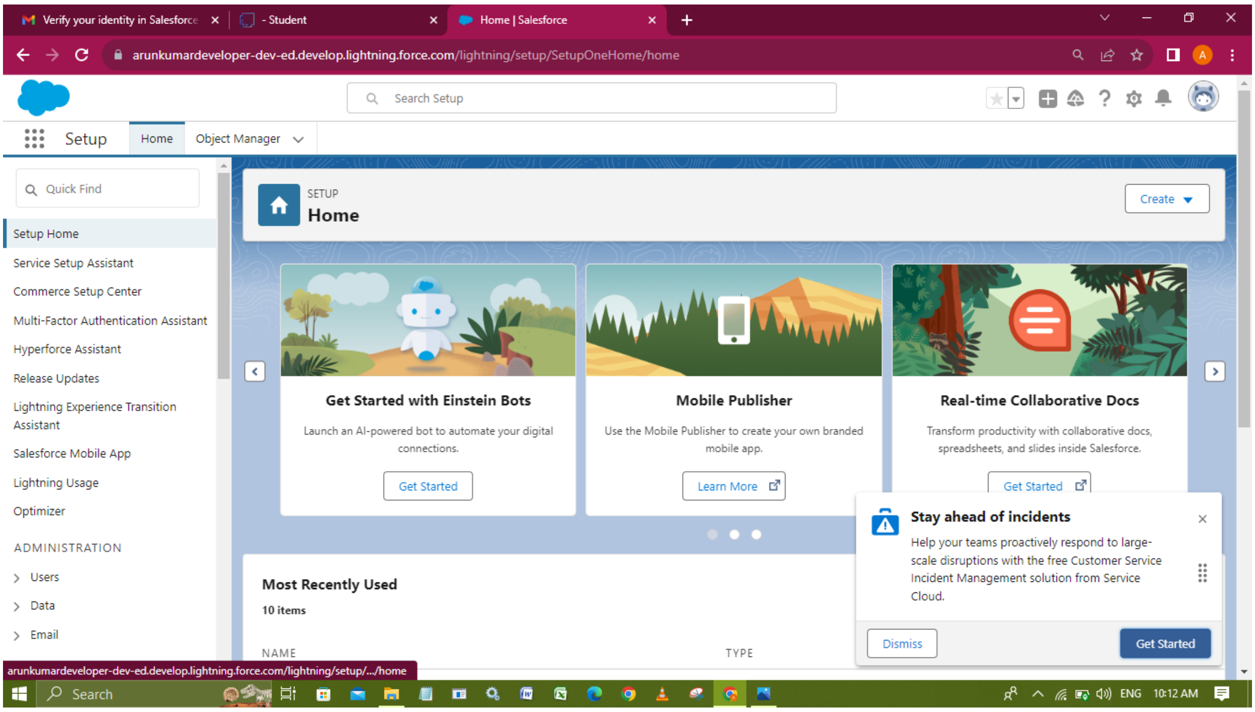




Account Activation

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

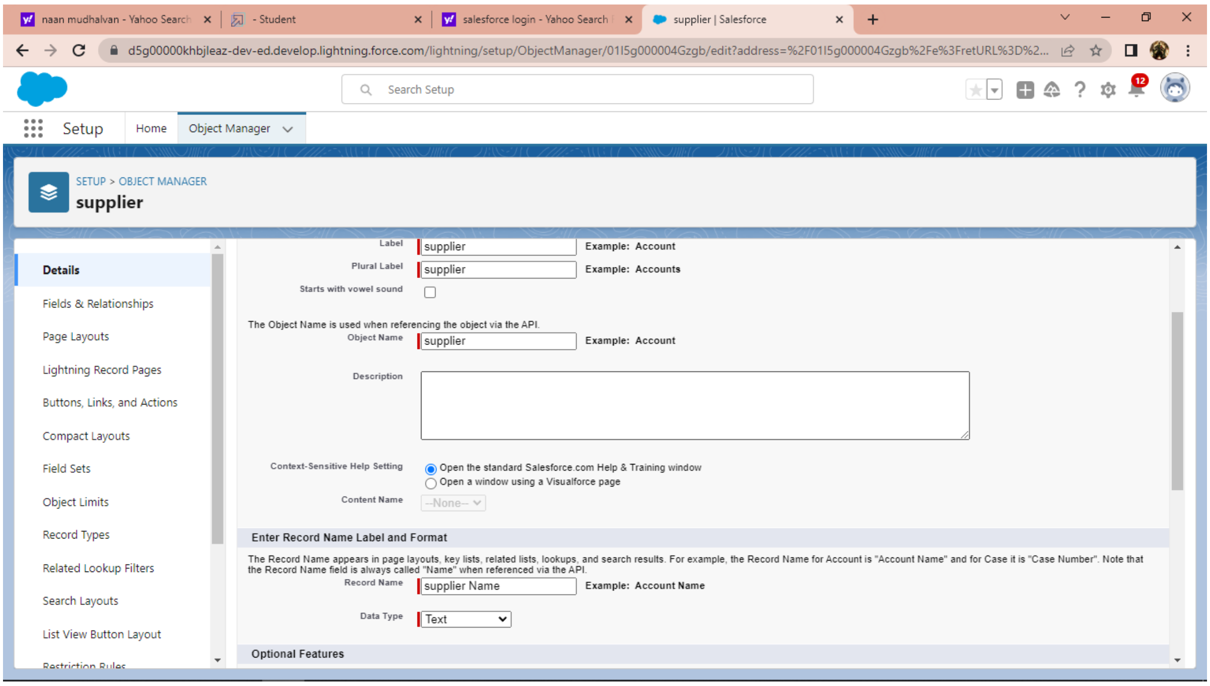


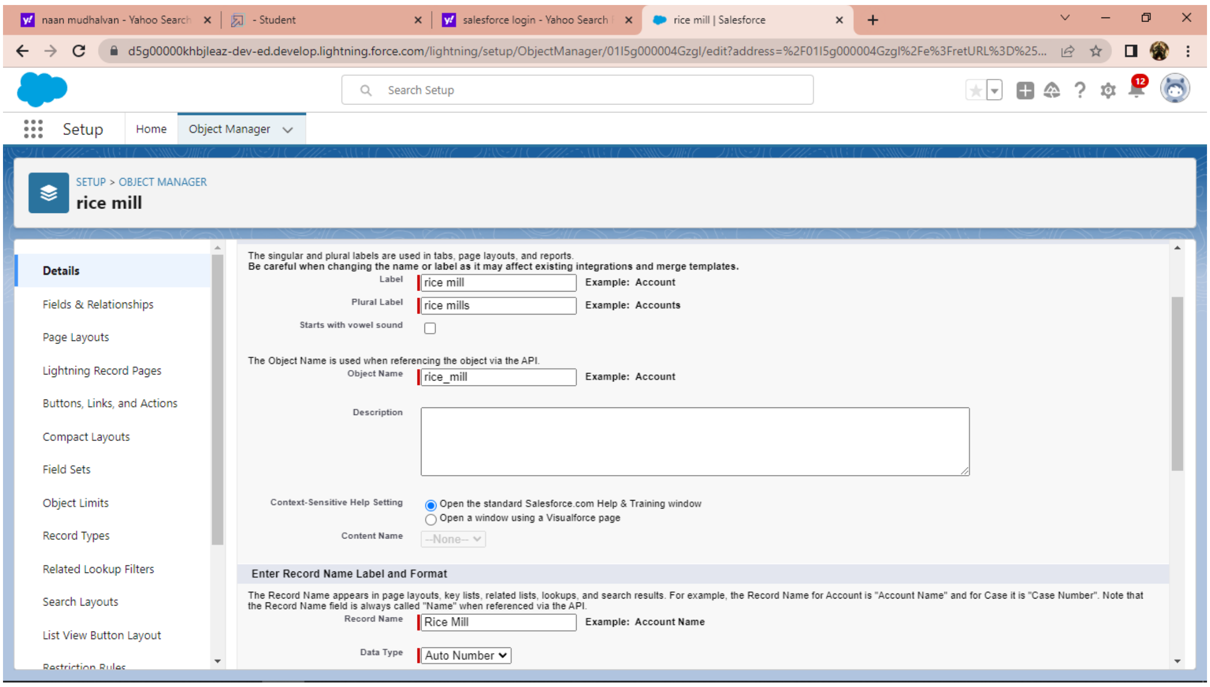


2.2 Object Creation

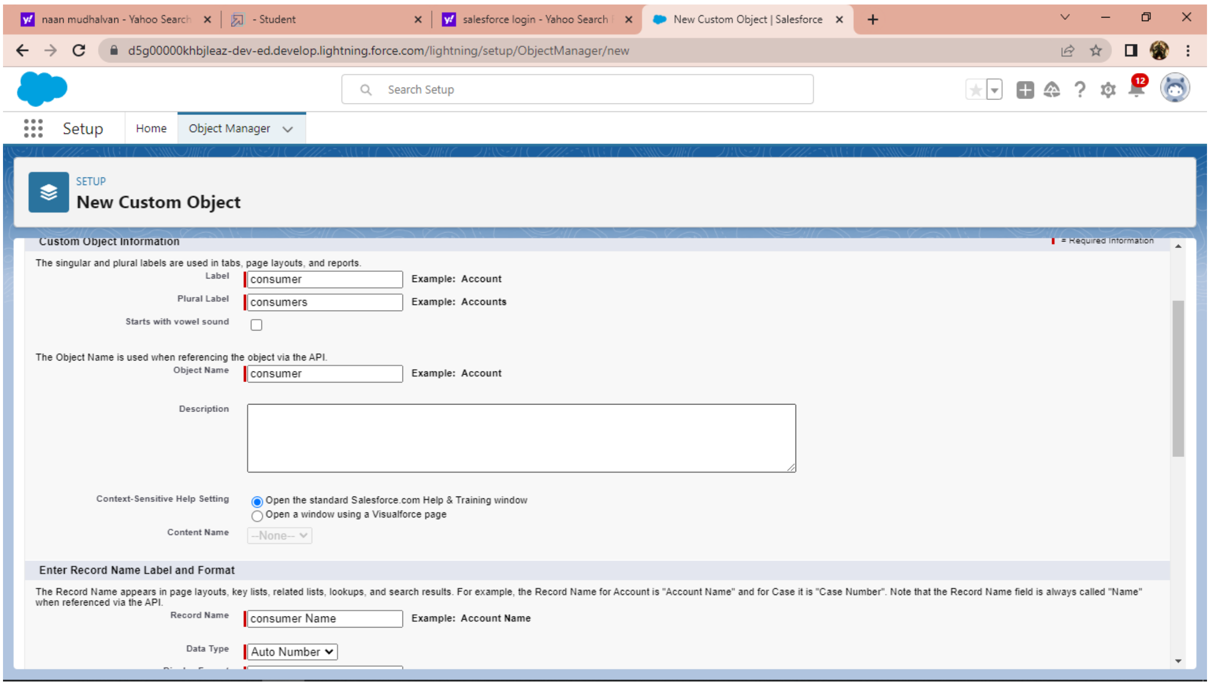
Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc. Custom objects: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

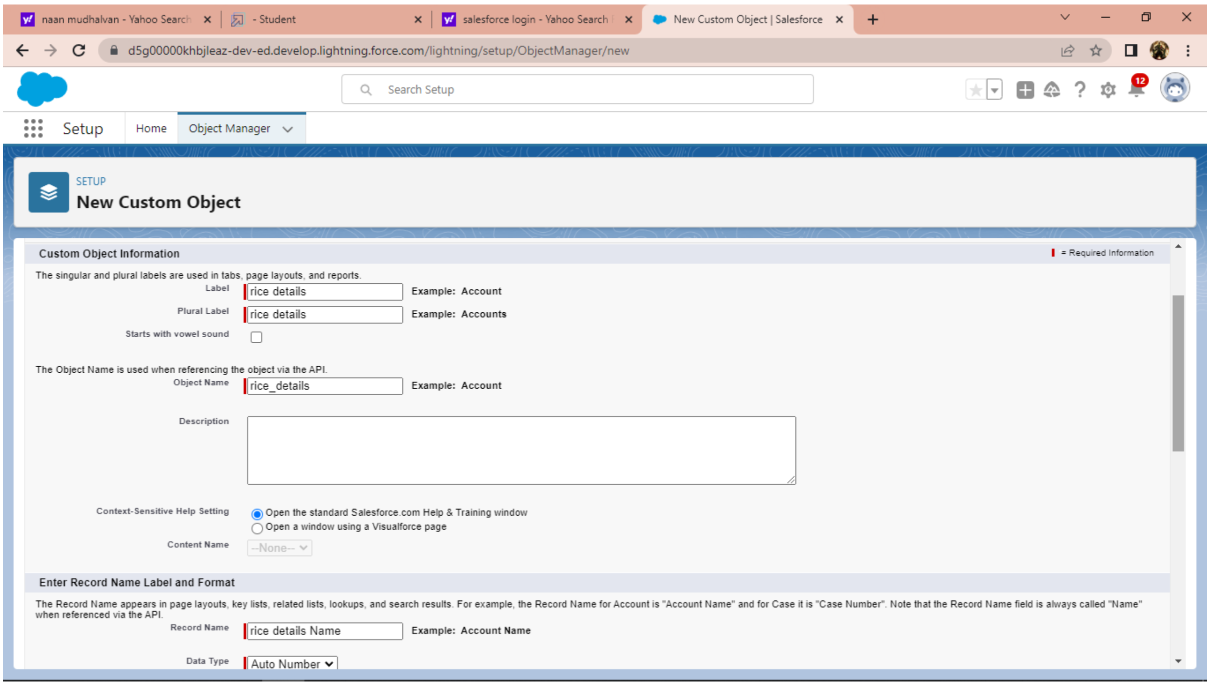
Create the Supplier Object &Rice Mill Object:





Create the Others Object

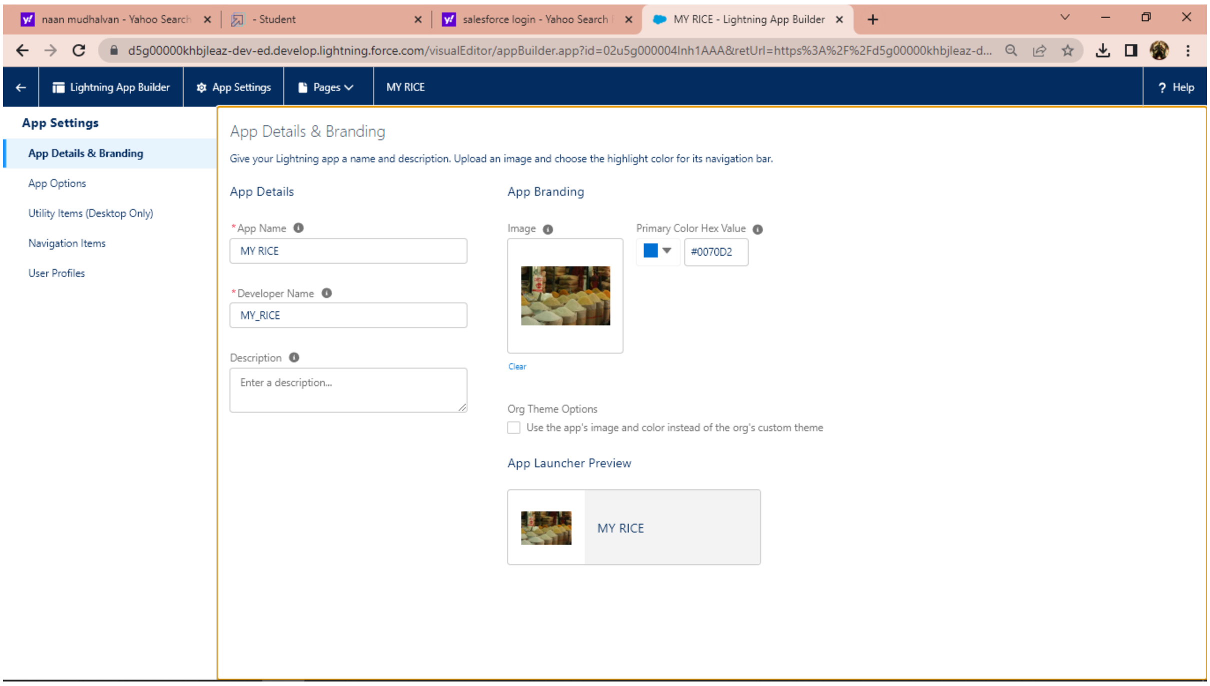




2.3 The Lightning App

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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MY RICE - Lightning App Builder
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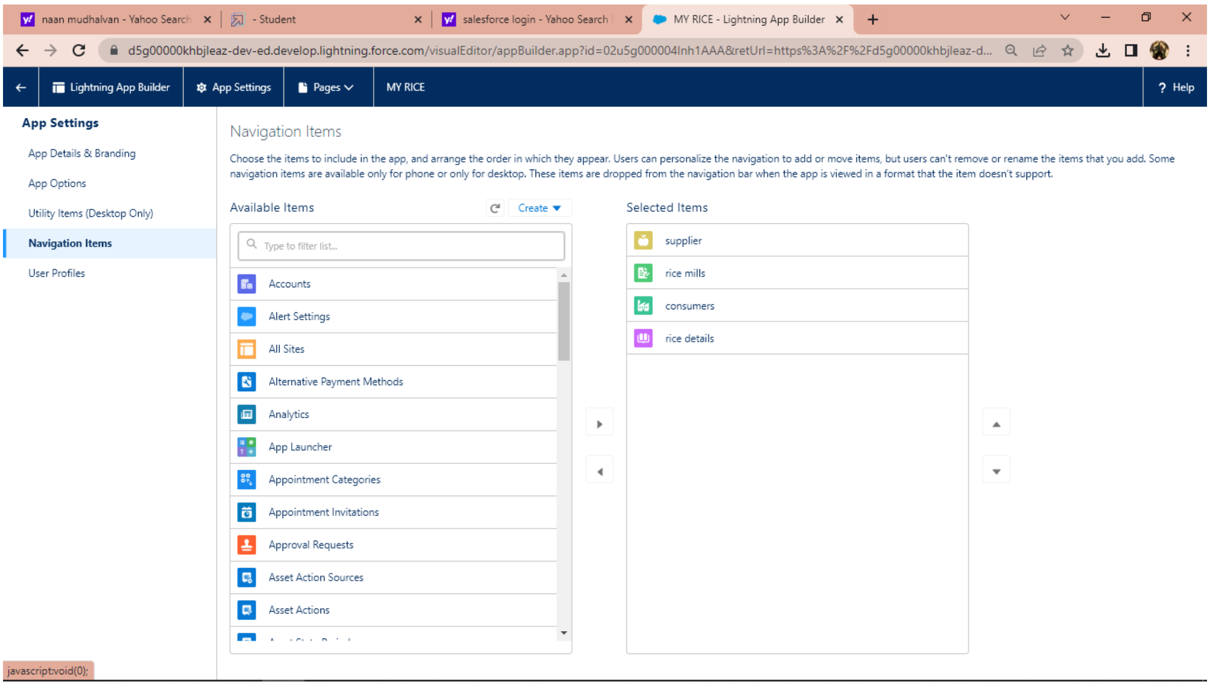
Lightning App Builder
App Settings
Pages
MY RICE
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
App Details & Branding
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
*App Name
MY RICE
*Developer Name
MY_RICE
Description
Enter a description...
App Branding
Image
Clear
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
MY RICE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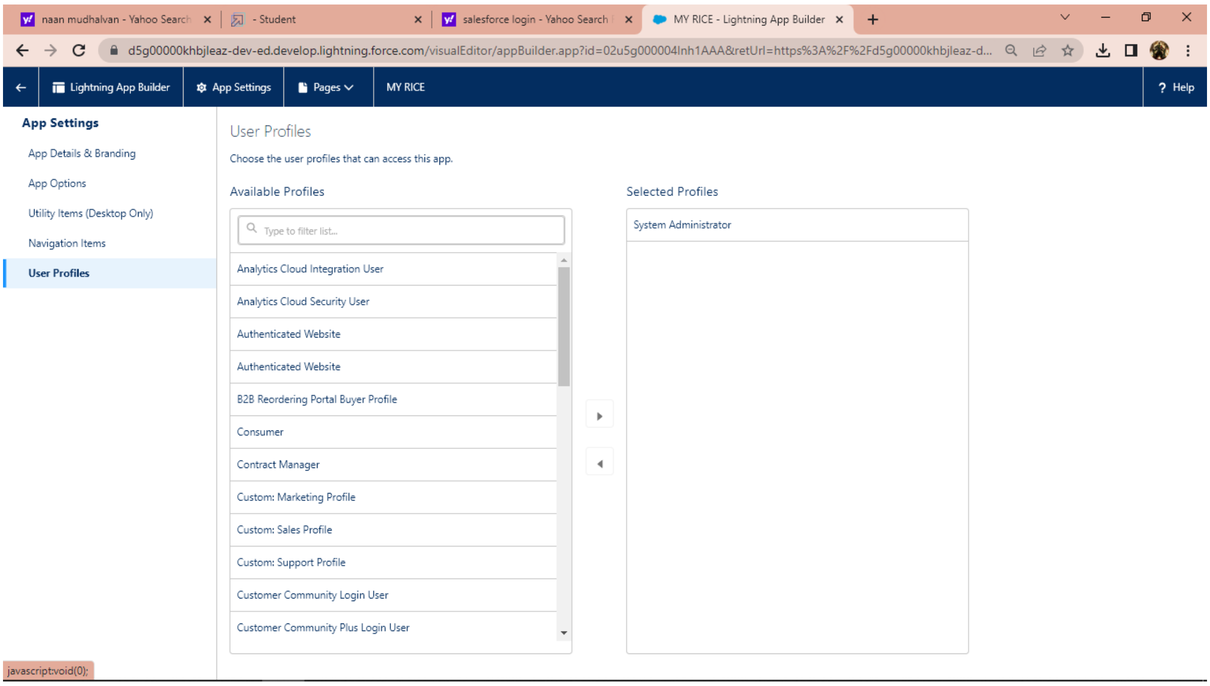
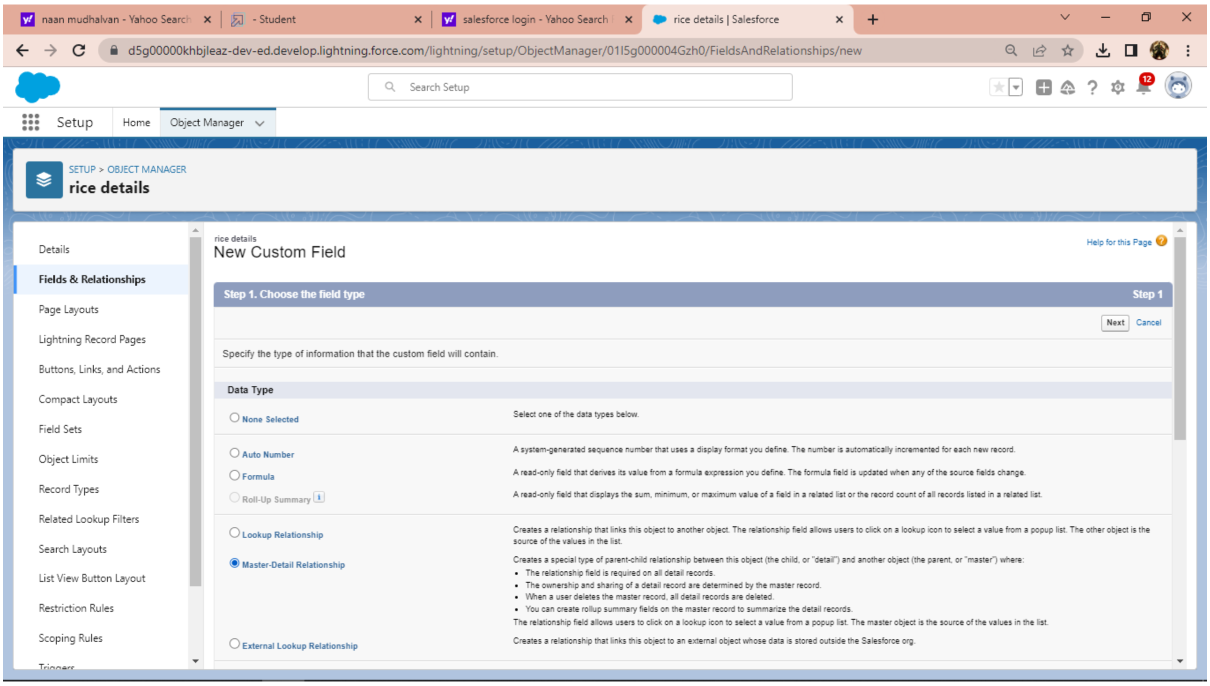
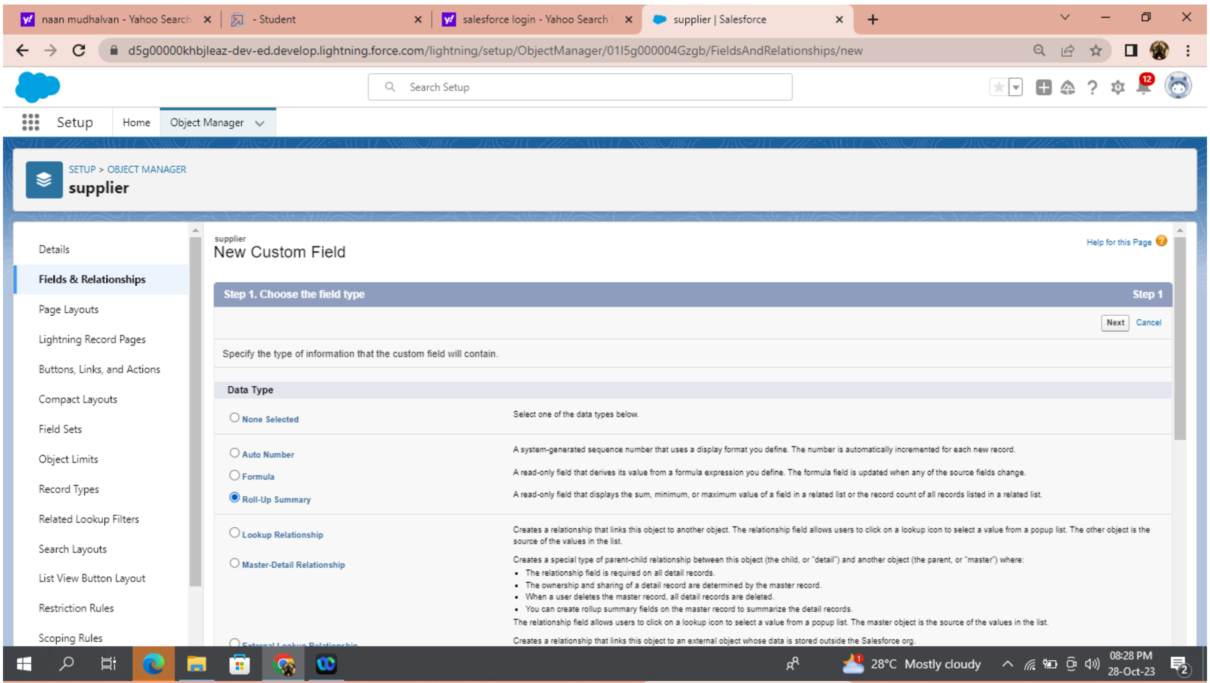
Lightning App Builder
App Settings
Pages
MY RICE
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
Navigation Items
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to 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
Create
Type to filter list...
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);



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.

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supplier | Salesforce
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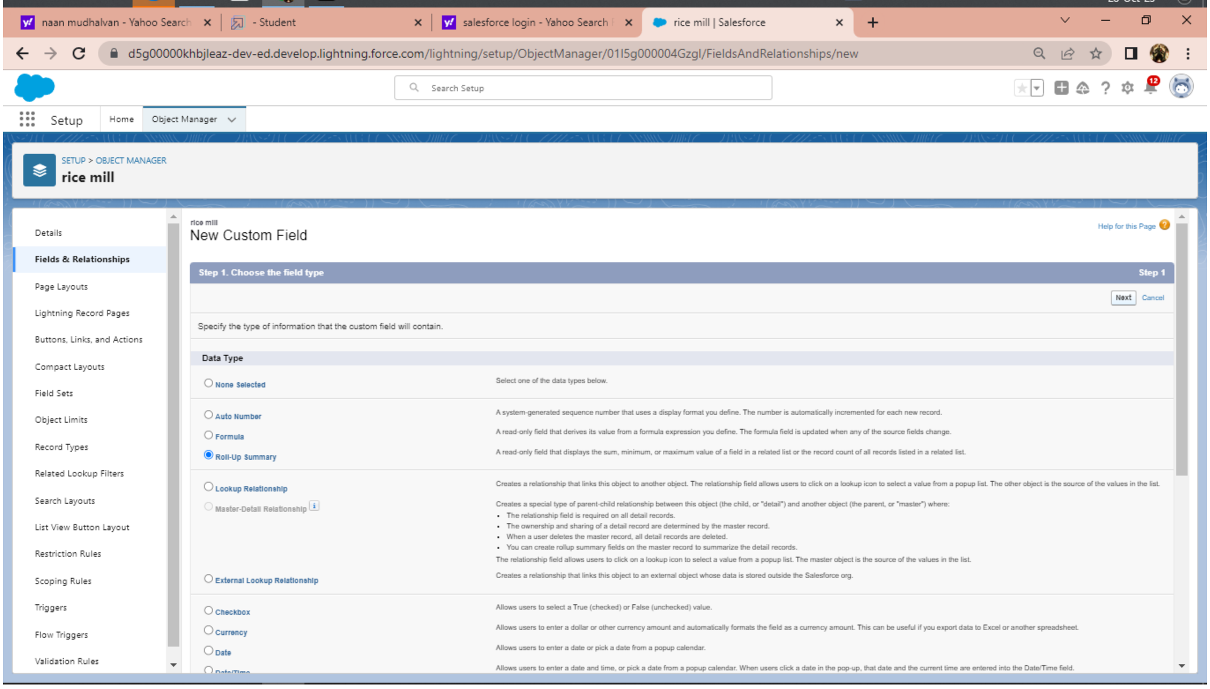
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
supplier
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
supplier
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
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.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
28°C Mostly cloudy
08:28 PM
28-Oct-23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Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
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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
rice mill
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
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.
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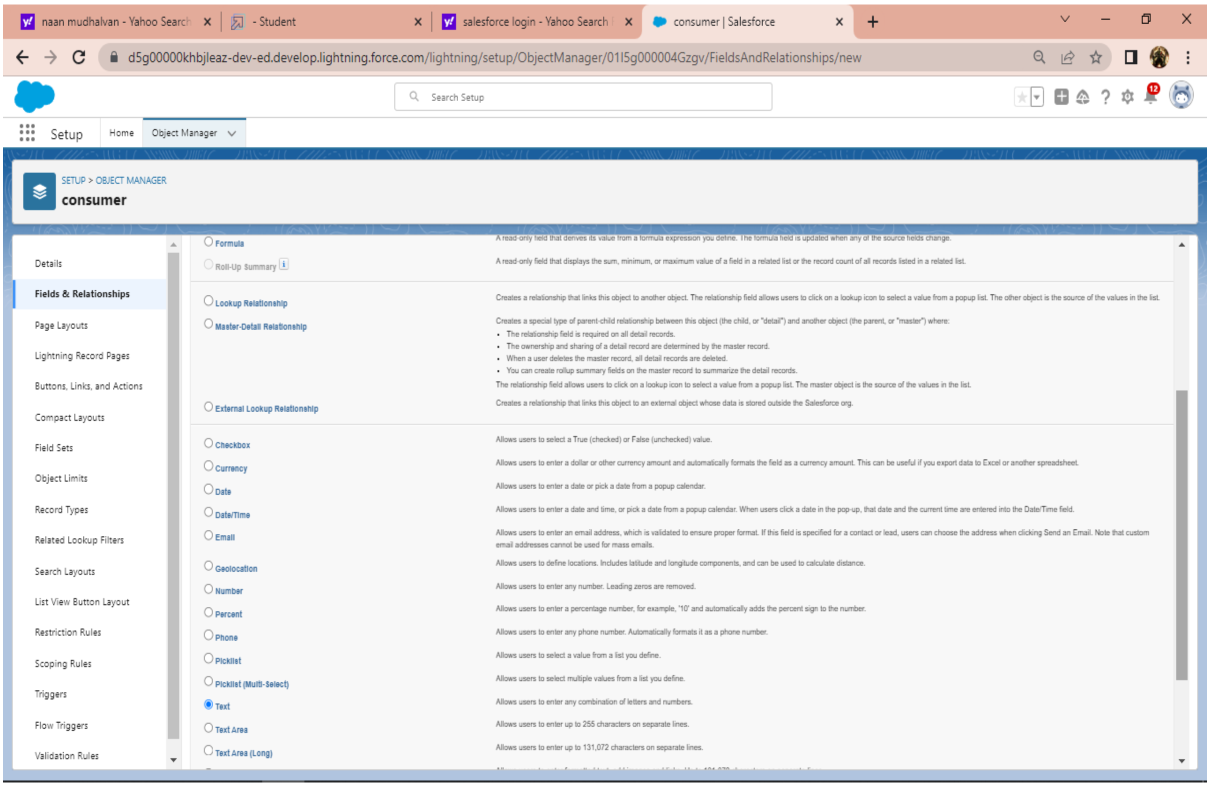
The ownership and sharing of a detail record are determined by the master record.
When a user deletes the master record, all detail records are deleted.
You can create rollup summary fields on the master record to summarize the detail records.
The relationship field allows users to click on a lookup icon to select a value from a popup list. 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 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 Date/Time field.



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.

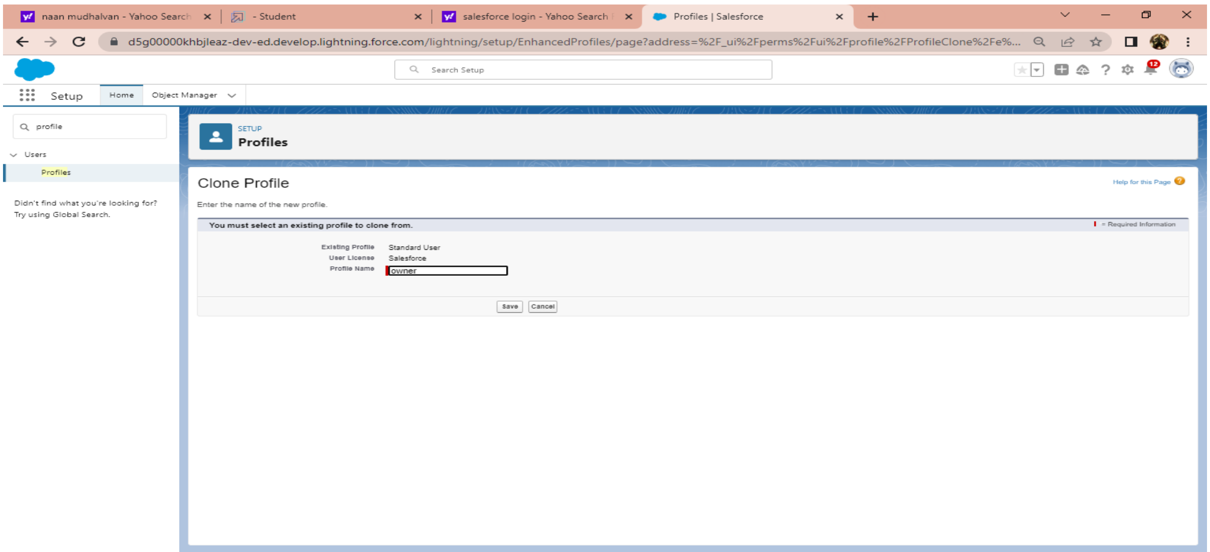
CHAPTER-3

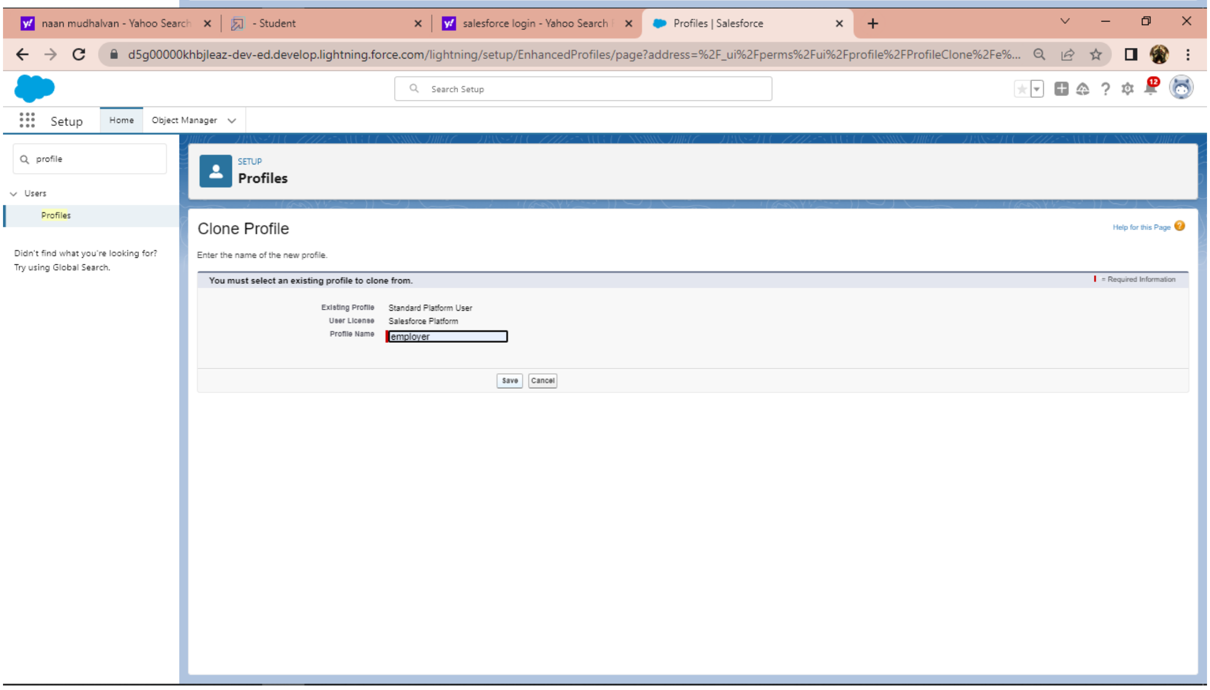
USERS & DATA SECURITY

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

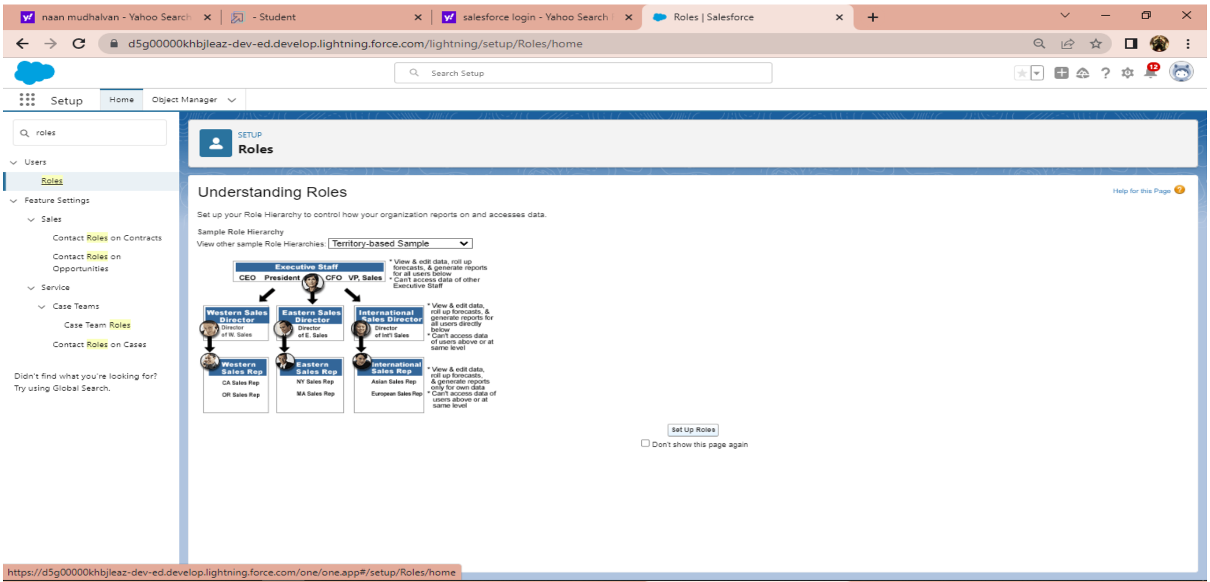


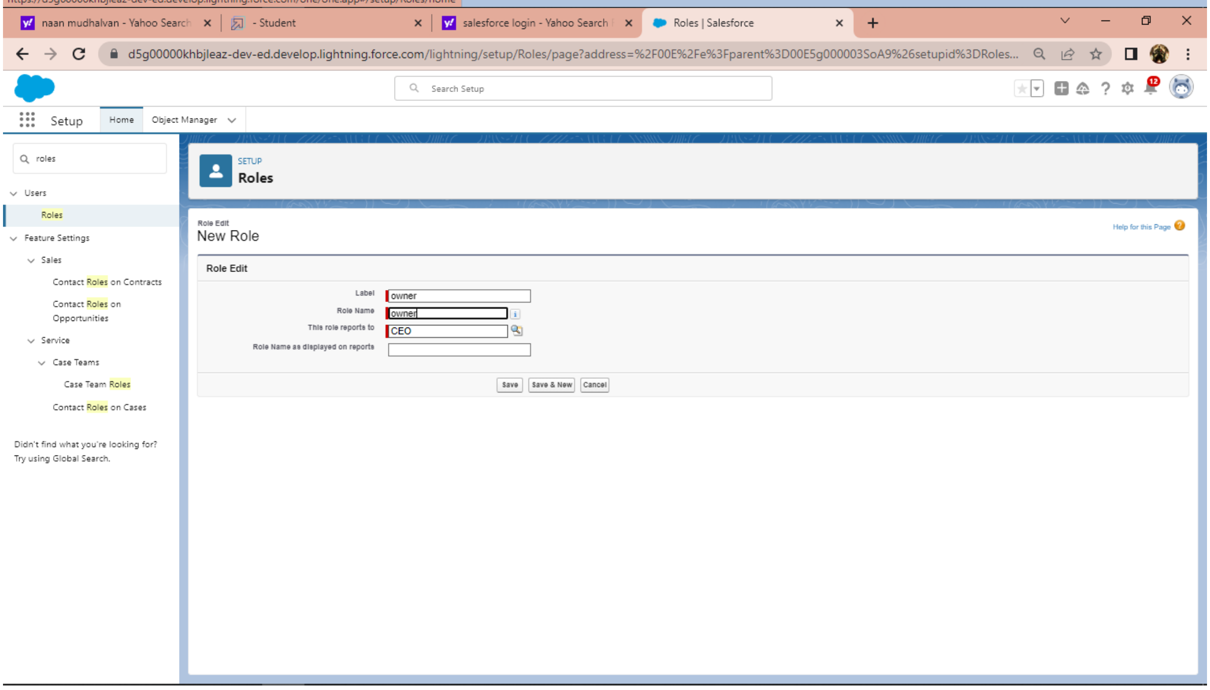


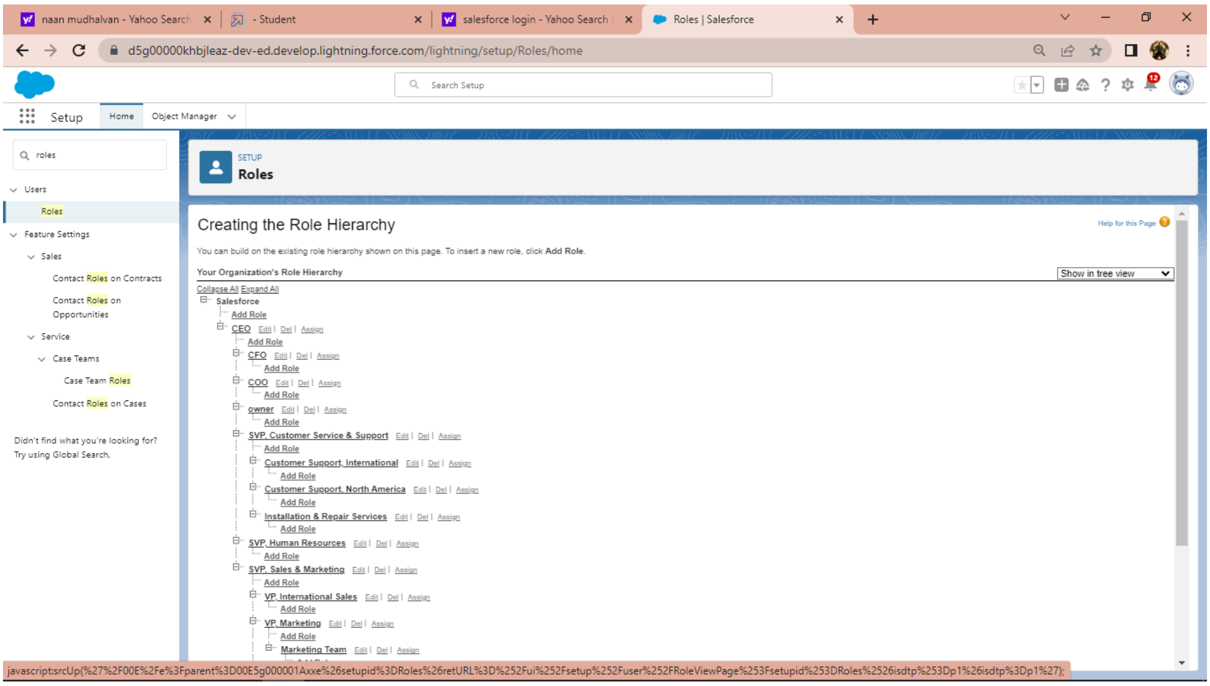
3.2 Role & Role Hierarchy:

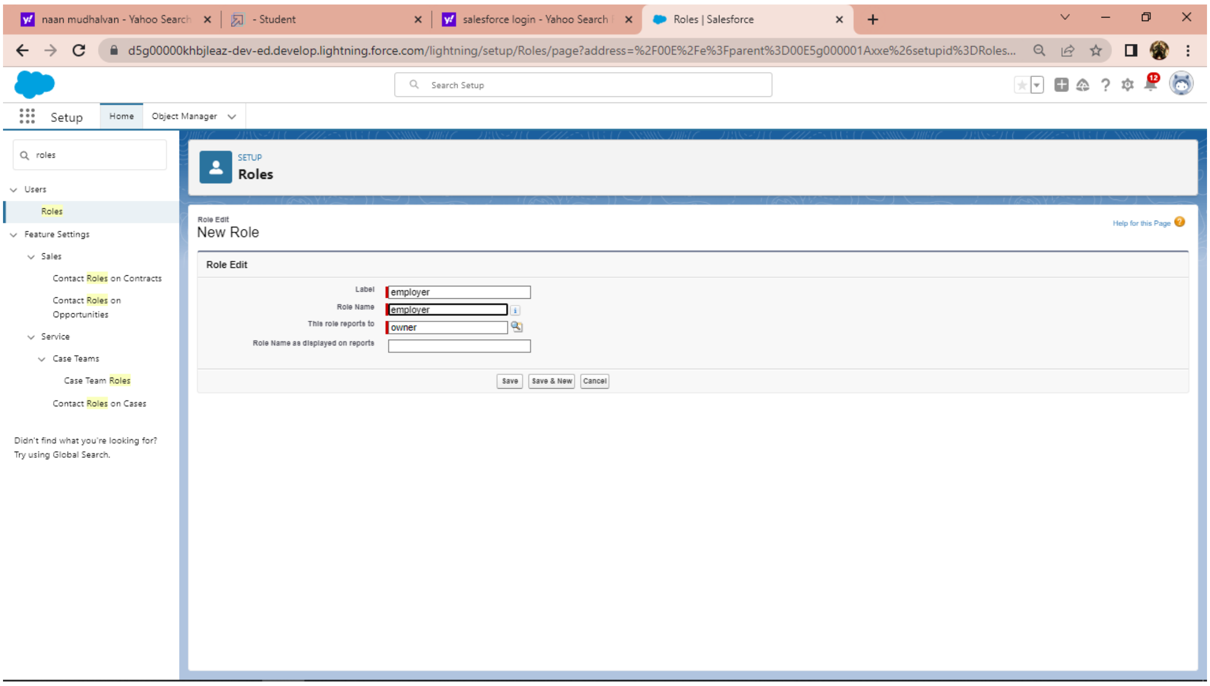
Salesforce roles are record-level access controls that define what data a user can see in Salesforce.

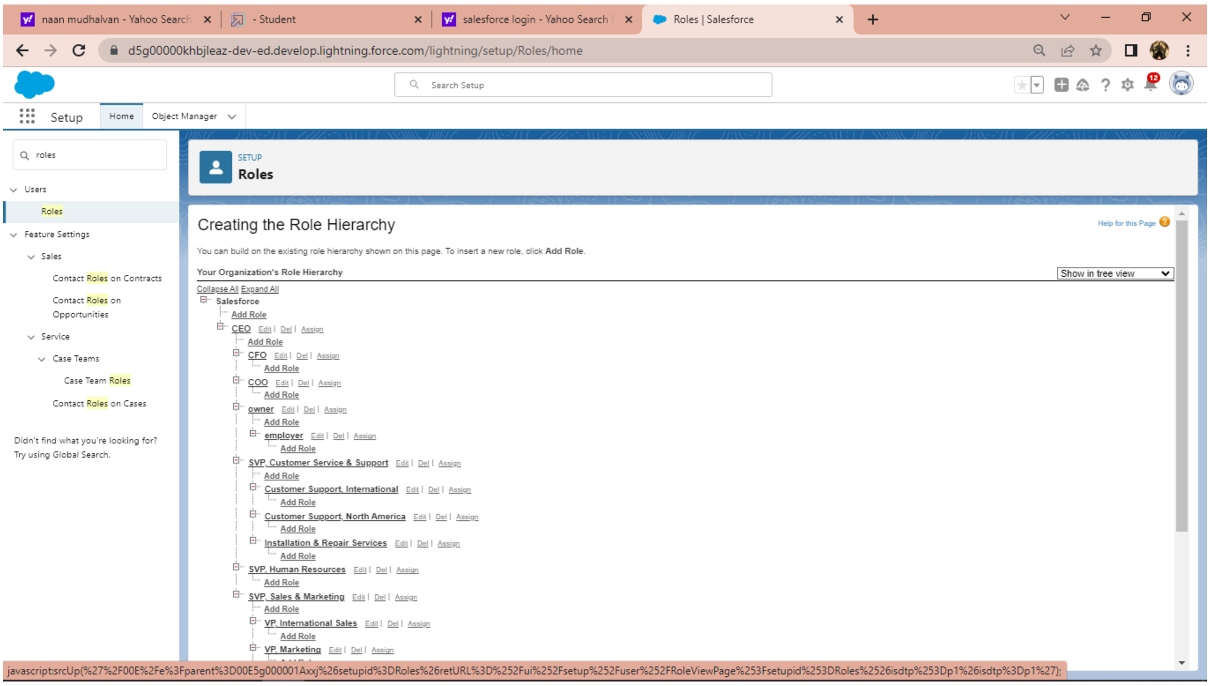
Creating a Role







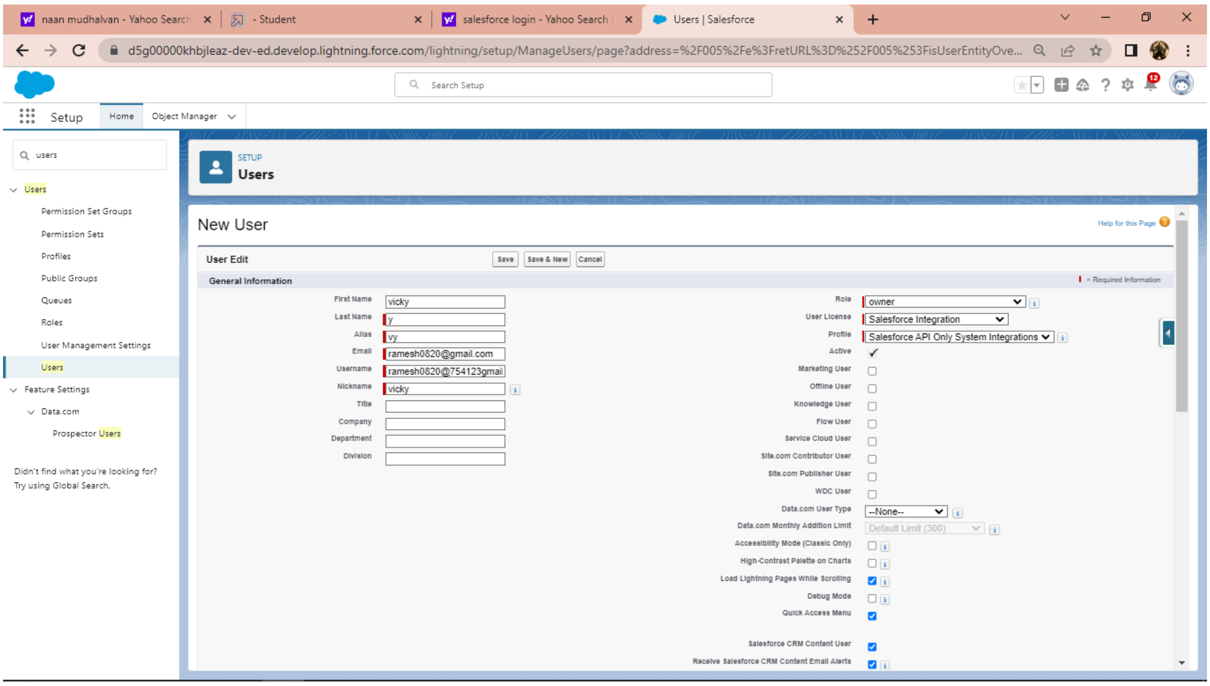




3.3 Users:

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.

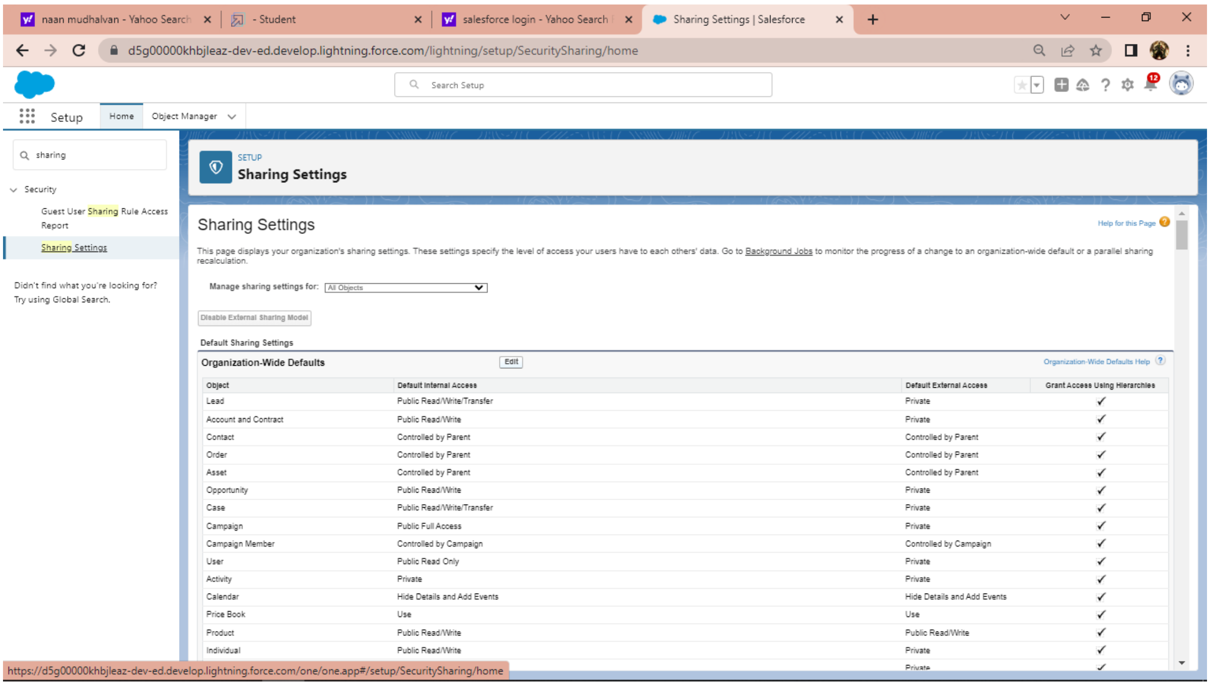
Creating A Users:

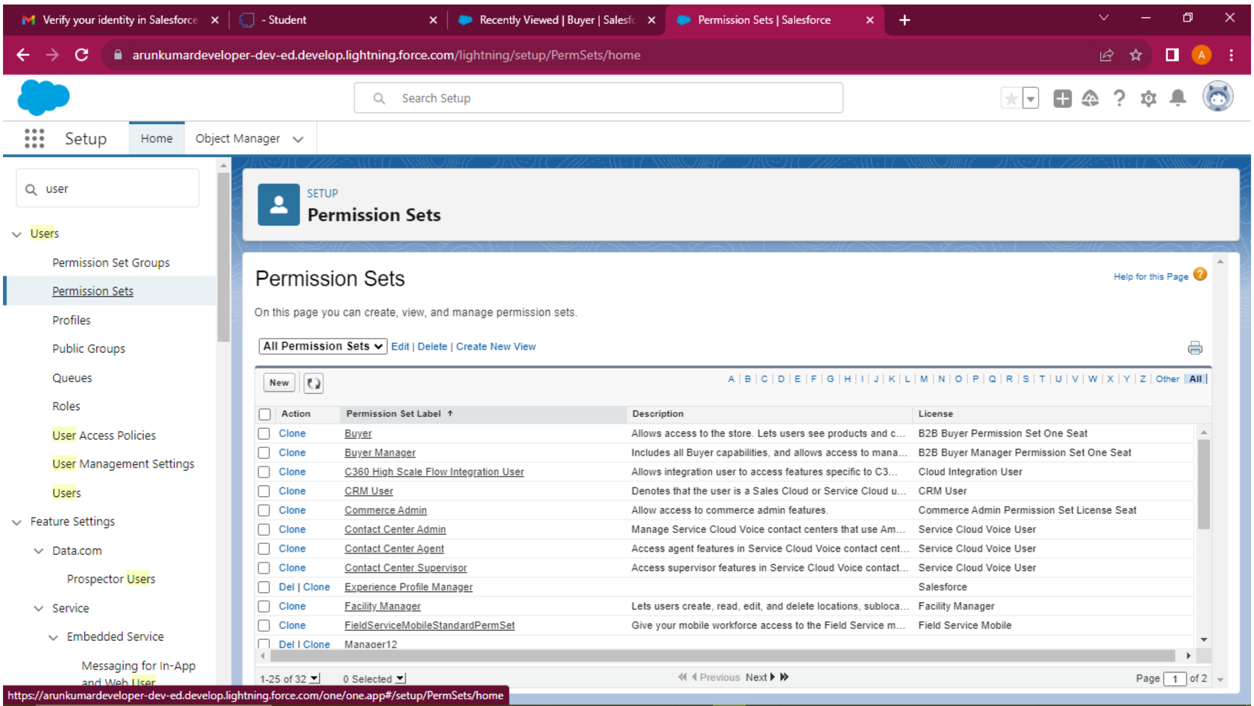


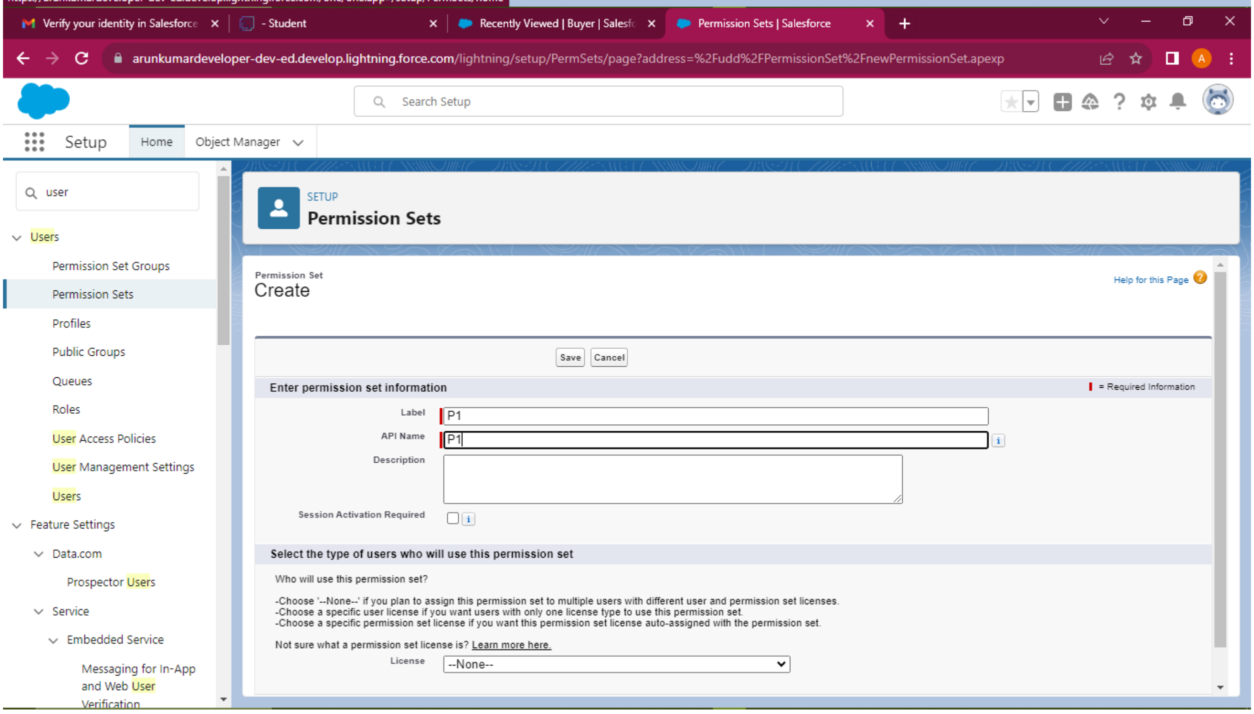
3.4 User Adoption & Approval

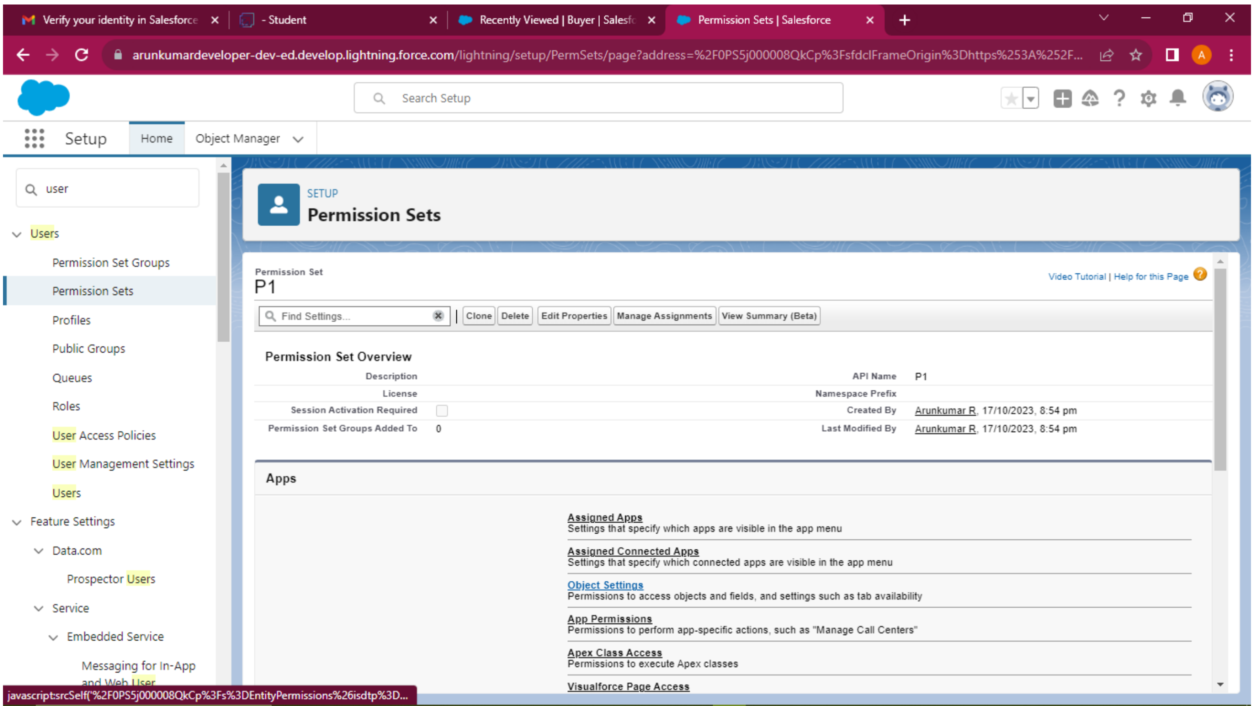
It is the interaction with database and their records.

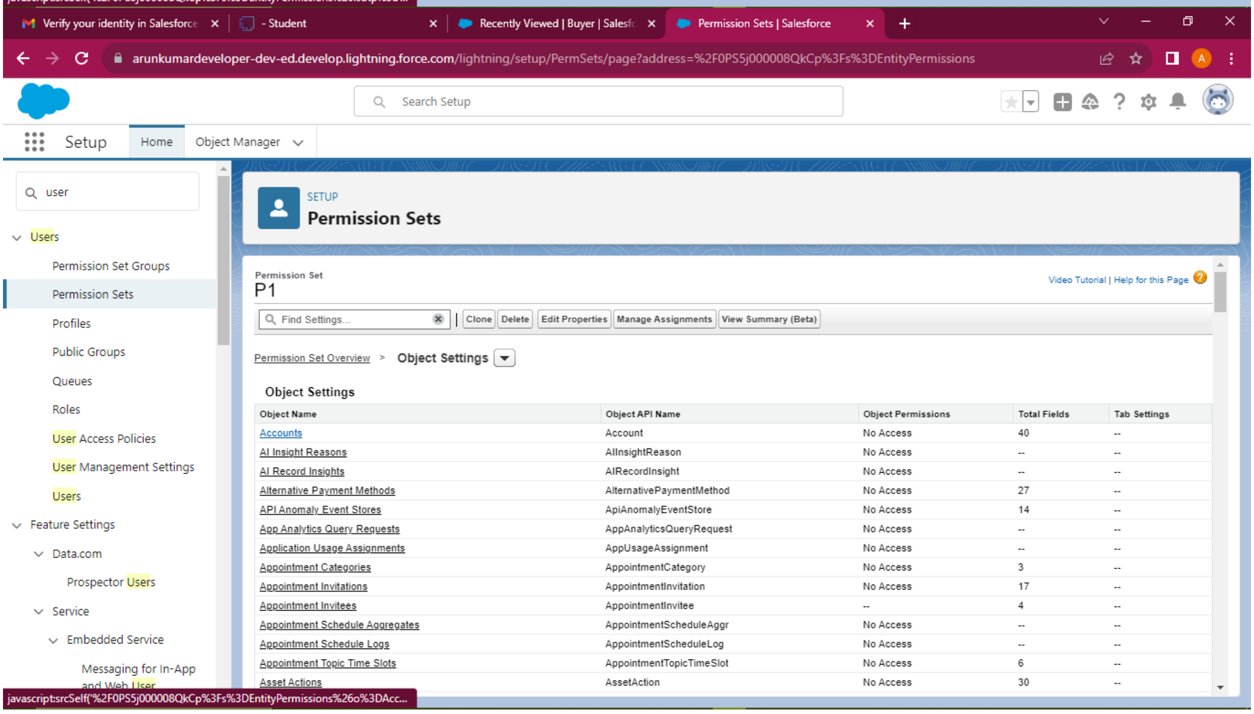
Create Permission Sets:

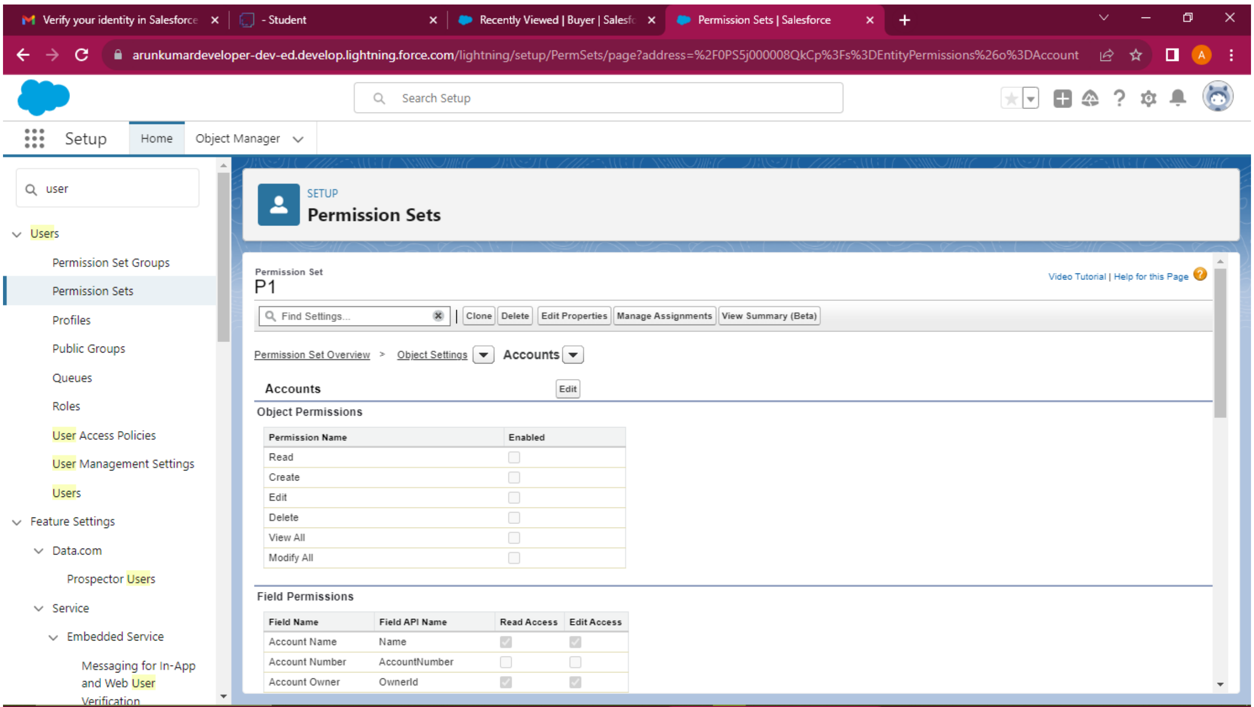


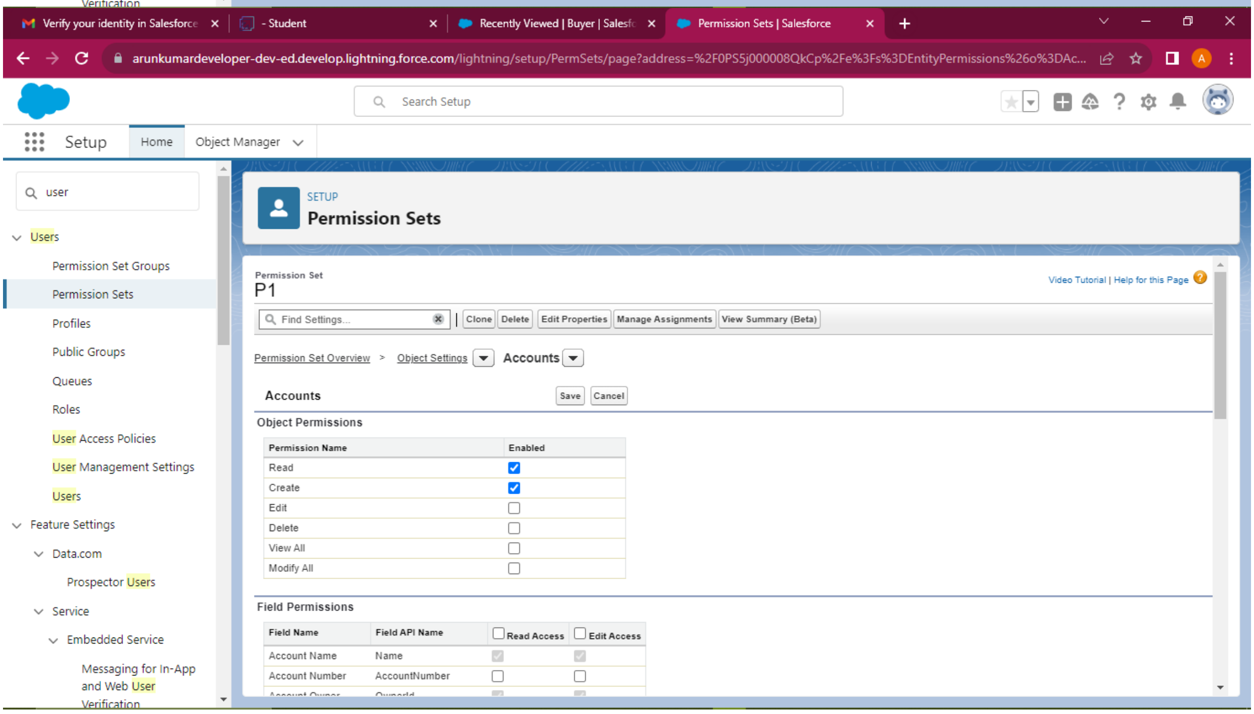

Verify your identity in Salesforce
- Student
Recently Viewed | Buyer | Salesfo
Permission Sets | Salesforce
arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home
Search Setup
Setup
Home
Object Manager
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
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
SETUP
Permission Sets
Permission Sets
Help for this Page
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, subloca... | 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
Previous Next
Page 1 of 2
https://arunkumardeveloper-dev-ed.develop.lightning.force.com/one/one.app#/setup/PermSets/home


Verify your identity in Salesforce
- Student
Recently Viewed | Buyer | Salesfo
Permission Sets | Salesforce
arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp
Search Setup
Setup
Home
Object Manager
user
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
SETUP
Permission Sets
Permission Set
Create
Help for this Page
Save
Cancel
Enter permission set information
= Required 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--


arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008QkCp%3FsfdcIFrameOrigin%3Dhttps%253A%252F...
Setup
Home
Object Manager
Search Setup
user
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
SETUP
Permission Sets
Permission Set
P1
Video Tutorial | Help for this Page
Clone
Delete
Edit Properties
Manage Assignments
View Summary (Beta)
Permission Set Overview
Description
API Name P1
License
Namespace Prefix
Session Activation Required
Created By Arunkumar R, 17/10/2023, 8:54 pm
Permission Set Groups Added To 0
Last Modified By Arunkumar R, 17/10/2023, 8:54 pm
Apps
Assigned Apps
Settings that specify which apps are visible in the app menu
Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu
Object Settings
Permissions to access objects and fields, and settings such as tab availability
App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"
Apex Class Access
Permissions to execute Apex classes
Visualforce Page Access
javascript:srcSelf('%2F0PS5j000008QkCp%3Fs%3DEntityPermissions%26isdtp%3D...


arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS5j000008QkCp%3Fs%3DEntityPermissions
Setup
Home
Object Manager
Search Setup
SETUP
Permission Sets
Permission Set
P1
Permission Set Overview > Object Settings
Object Settings
Object Name | Object API Name | Object Permissions | Total Fields | Tab Settings
Accounts | Account | No Access | 40 | --
AI Insight Reasons | AIInsightReason | 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 Invitees | AppointmentInvitee | -- | 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 | --
javascript:srcSelf('%2F0PS5j000008QkCp%3Fs%3DEntityPermissions%26o%3DAcc...



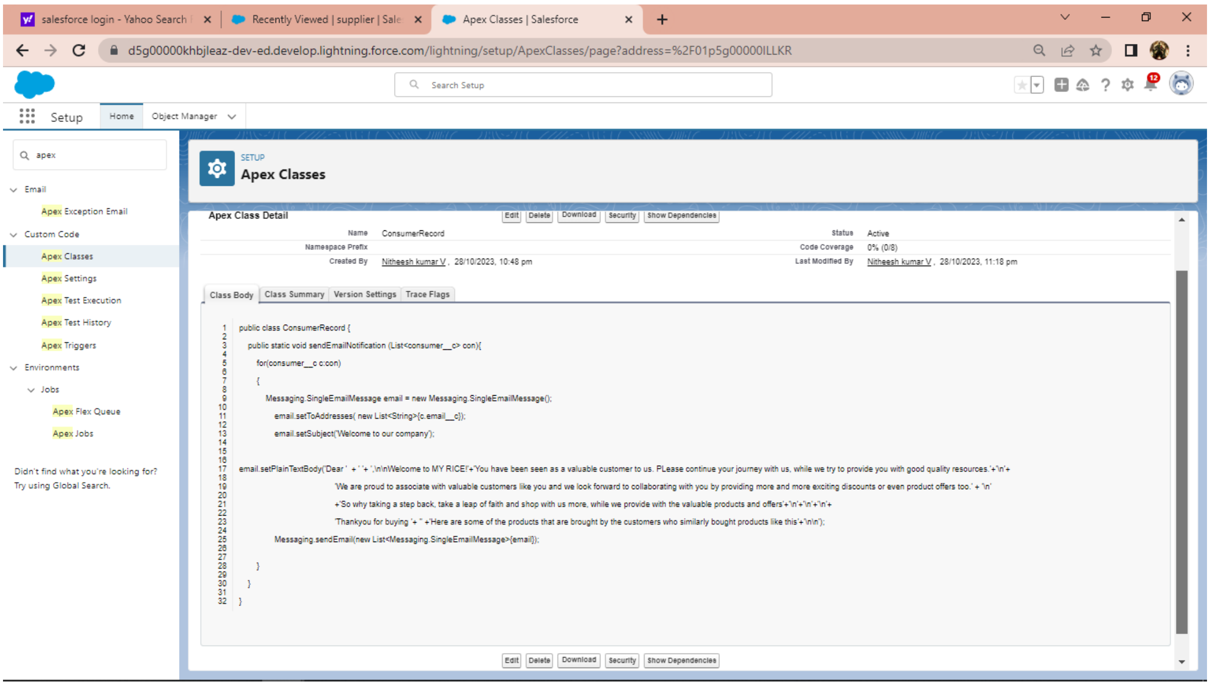


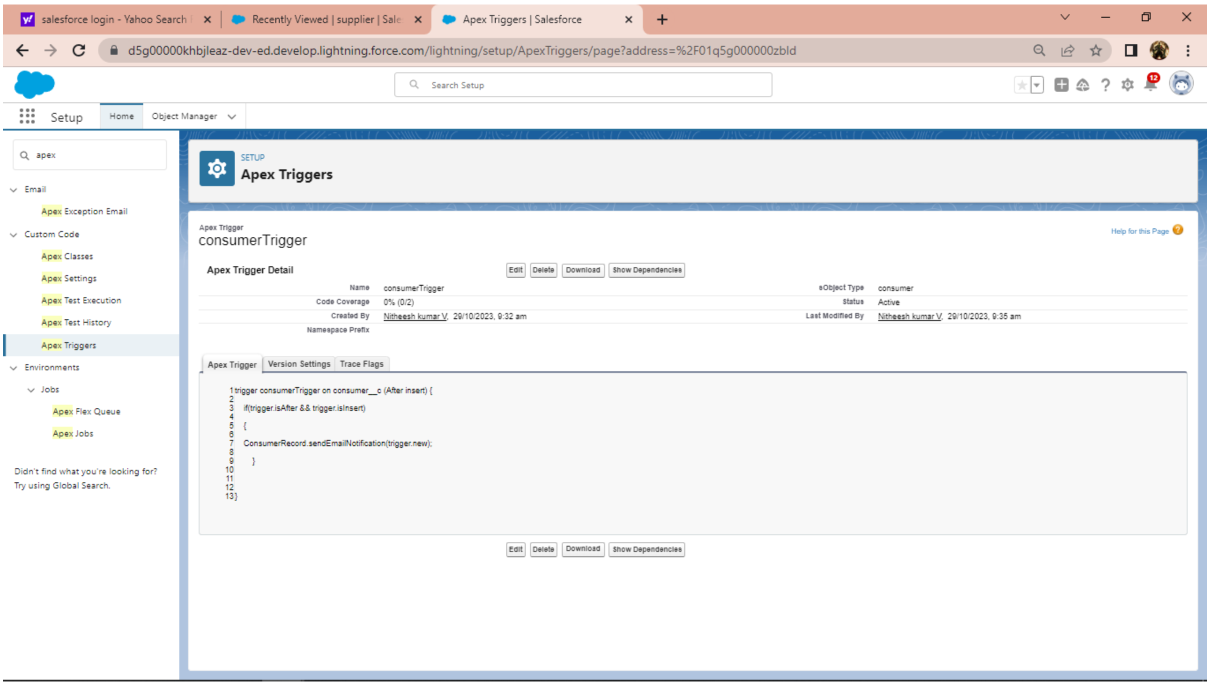
CHAPTER-4

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.





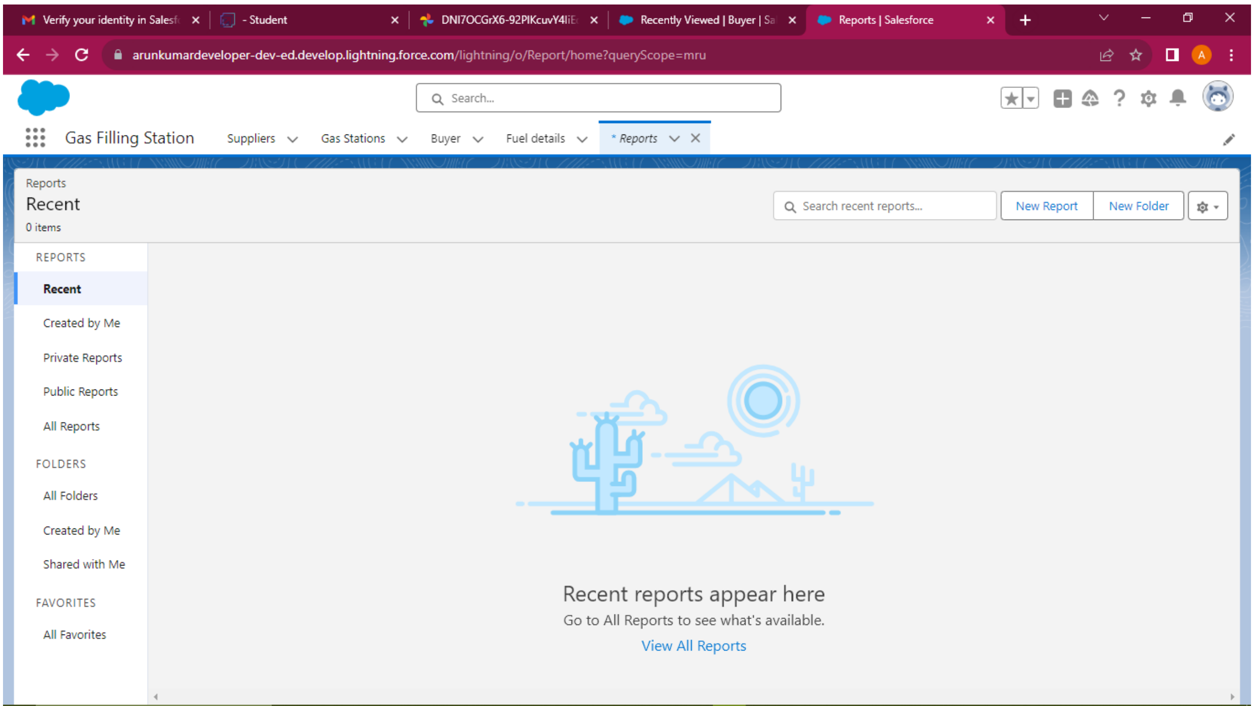
CHAPTER-5

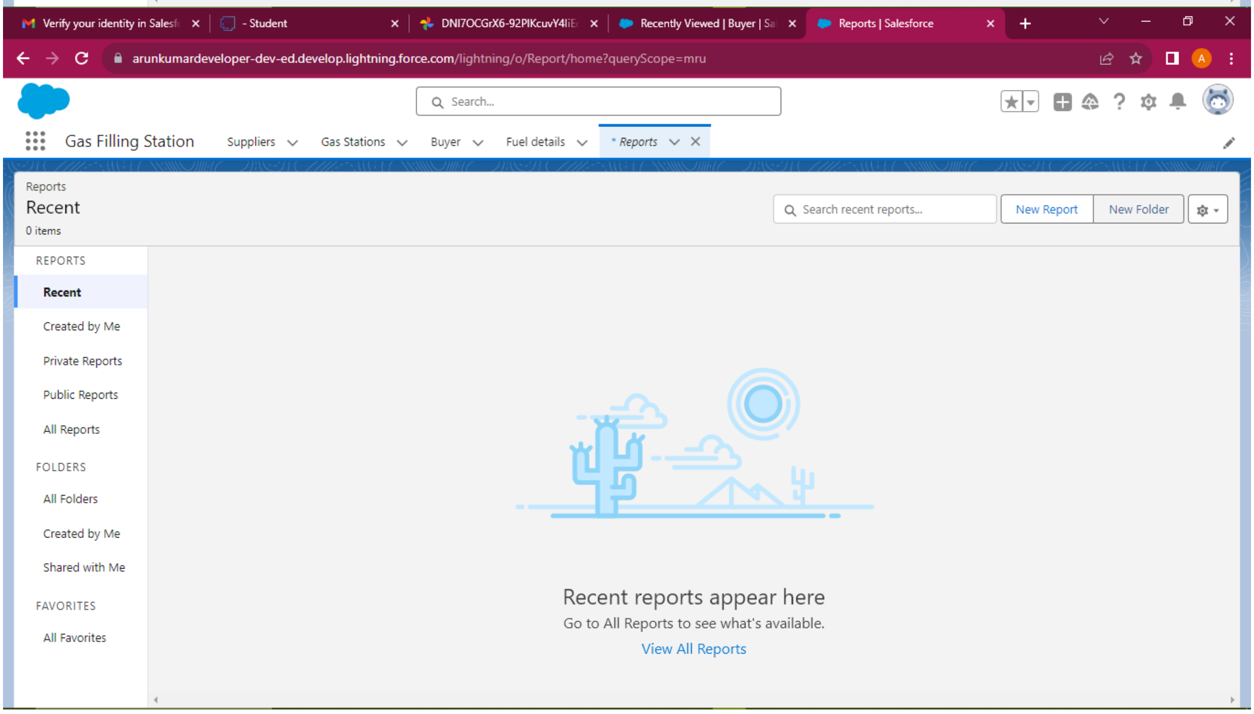
REPORTS & DASHBOARD

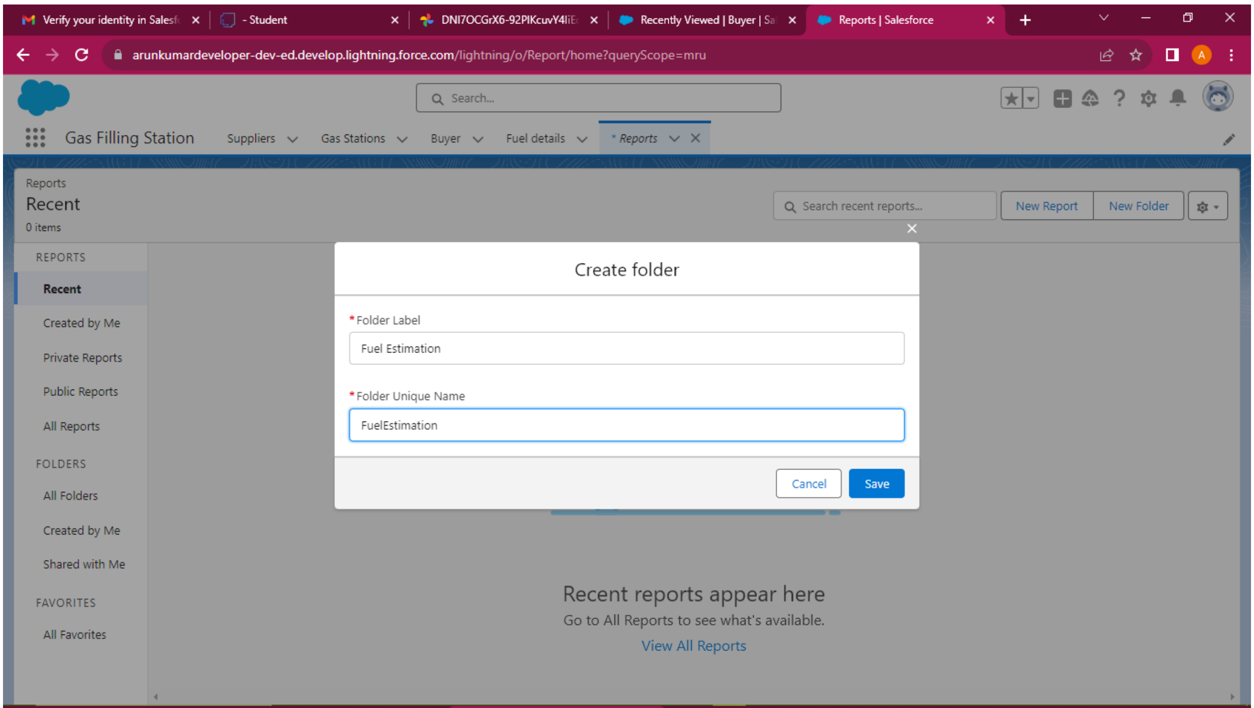
5.1 Reports

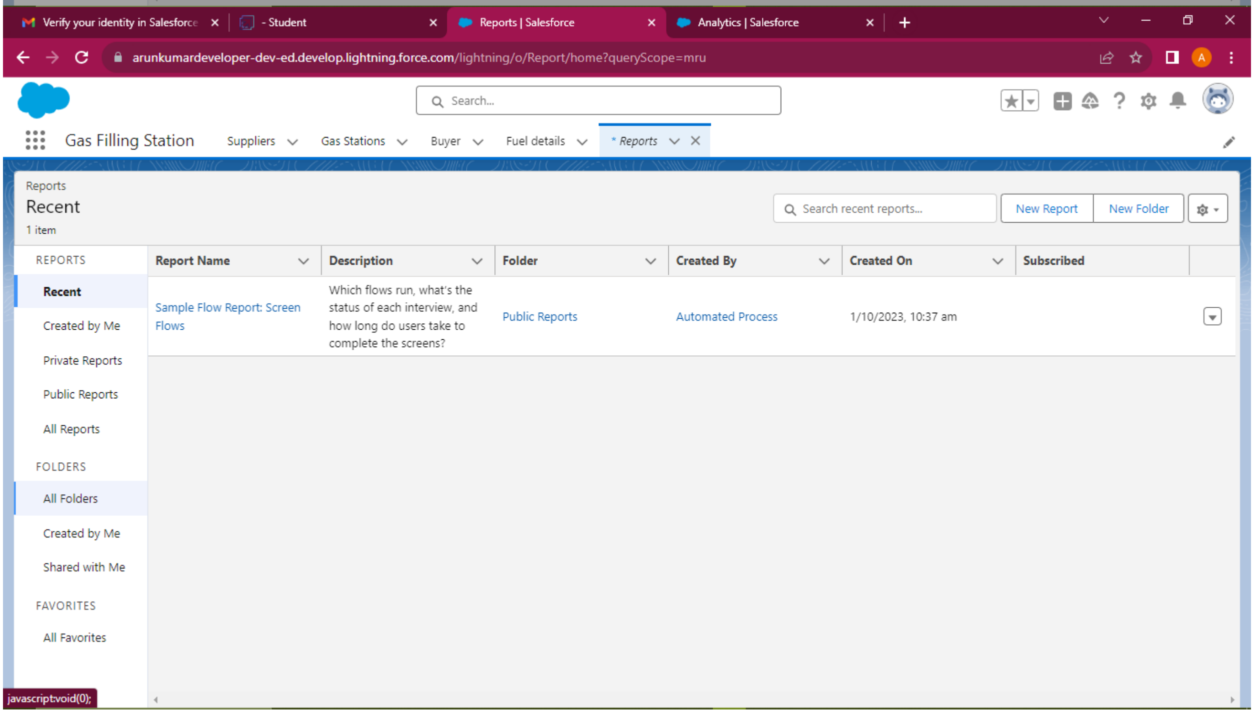
A Salesforce report is a list of data generated based on filter criteria. Salesforce Reports helped us predict trends and gives us the advantage to increase profits. The report builder provides a drag-and-drop interface to easily build and customize your reports.

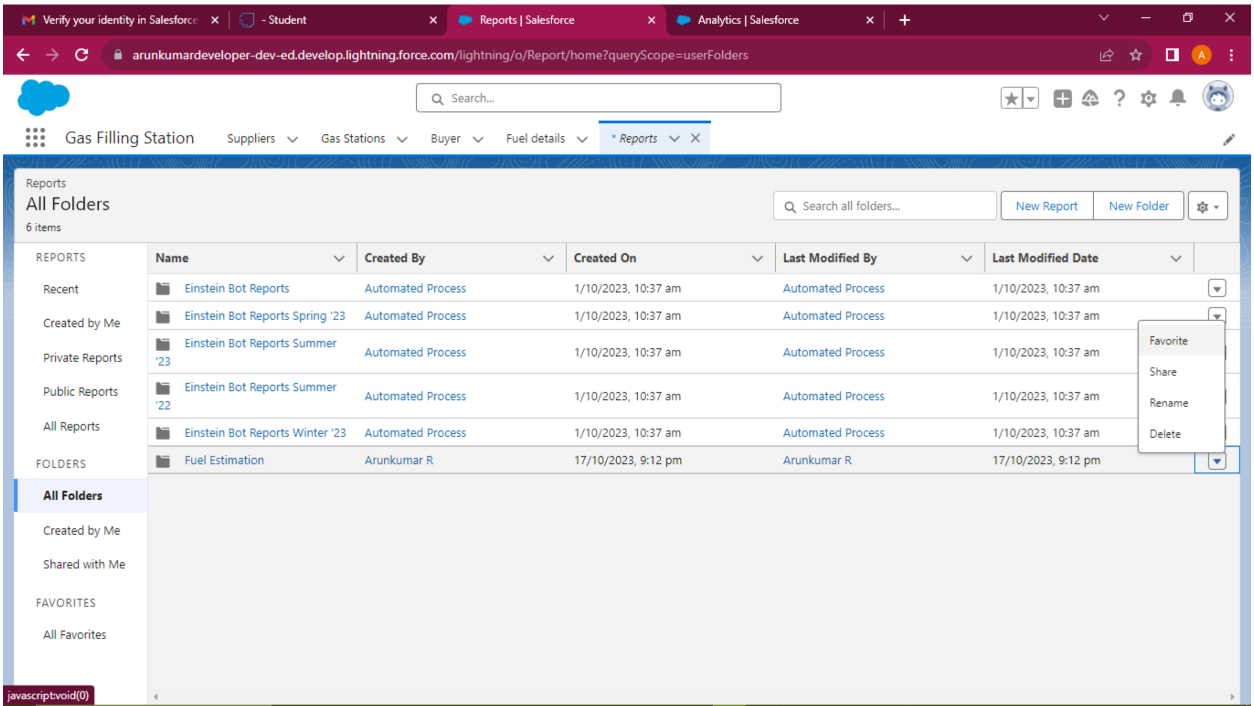
View Report


Verify your identity in Salesf
- Student
DNI7OCGrX6-92PIKcuvY4liE
Recently Viewed | Buyer | Sa
Reports | Salesforce
arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru
Search...
Gas Filling Station
Suppliers
Gas Stations
Buyer
Fuel details
* Reports
Reports
Recent
0 items
Search recent reports...
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Recent reports appear here
Go to All Reports to see what's available.
View All Reports

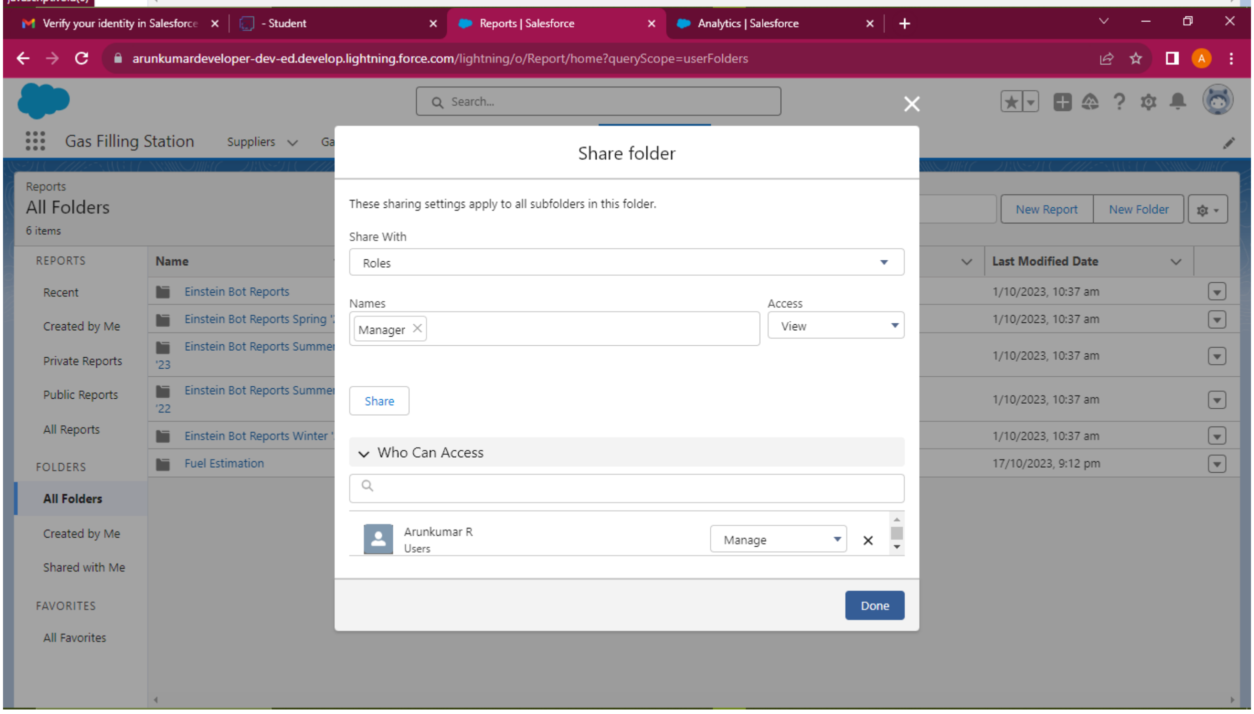

Verify your identity in Salesf
- Student
DNI7OCGrX6-92PIKcuvY4liE
Recently Viewed | Buyer | Sa
Reports | Salesforce
arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru
Search...
Gas Filling Station
Suppliers
Gas Stations
Buyer
Fuel details
* Reports
Reports
Recent
0 items
Search recent reports...
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Recent reports appear here
Go to All Reports to see what's available.
View All Reports


Gas Filling Station
Suppliers
Gas Stations
Buyer
Fuel details
* Reports
Reports
Recent
0 items
New Report
New Folder
Create folder
*Folder Label
Fuel Estimation
*Folder Unique Name
FuelEstimation
Cancel
Save
Recent reports appear here
Go to All Reports to see what's available.
View All Reports

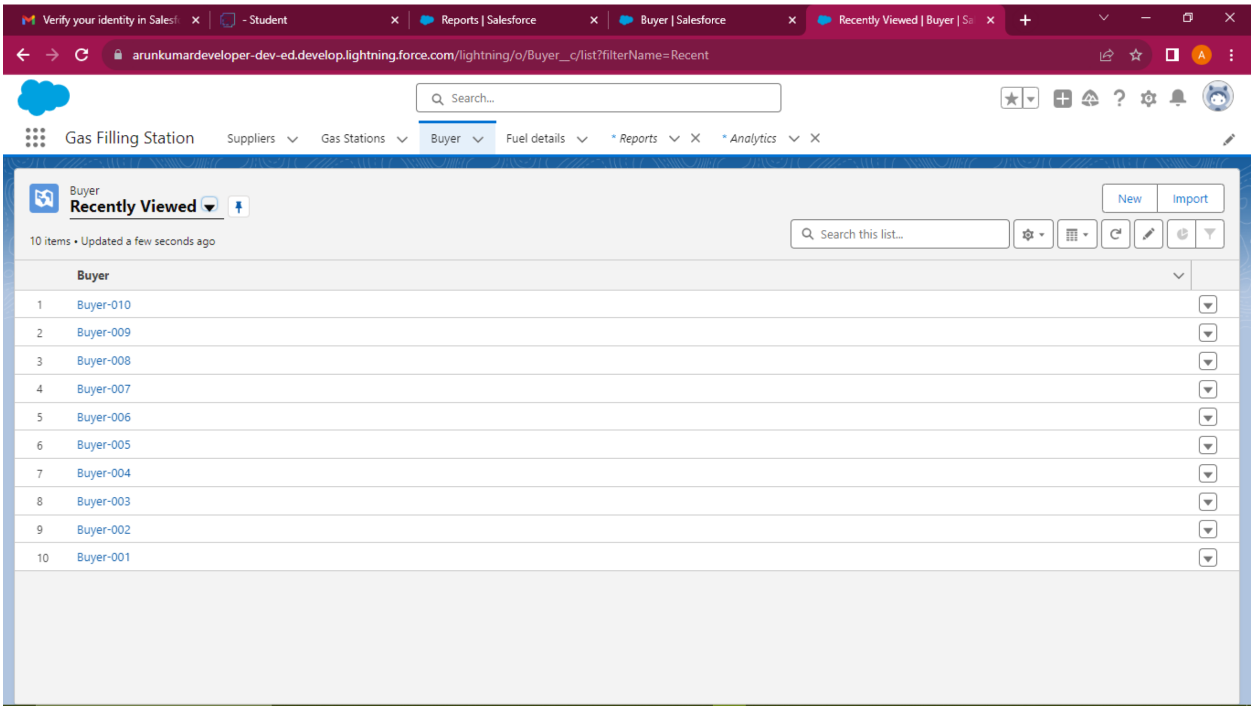

Gas Filling Station
Reports
Recent
1 item
New Report
New Folder
Report Name
Description
Folder
Created By
Created On
Subscribed
Sample Flow Report: Screen Flows
Which flows run, what's the status of each interview, and how long do users take to complete the screens?
Public Reports
Automated Process
1/10/2023,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

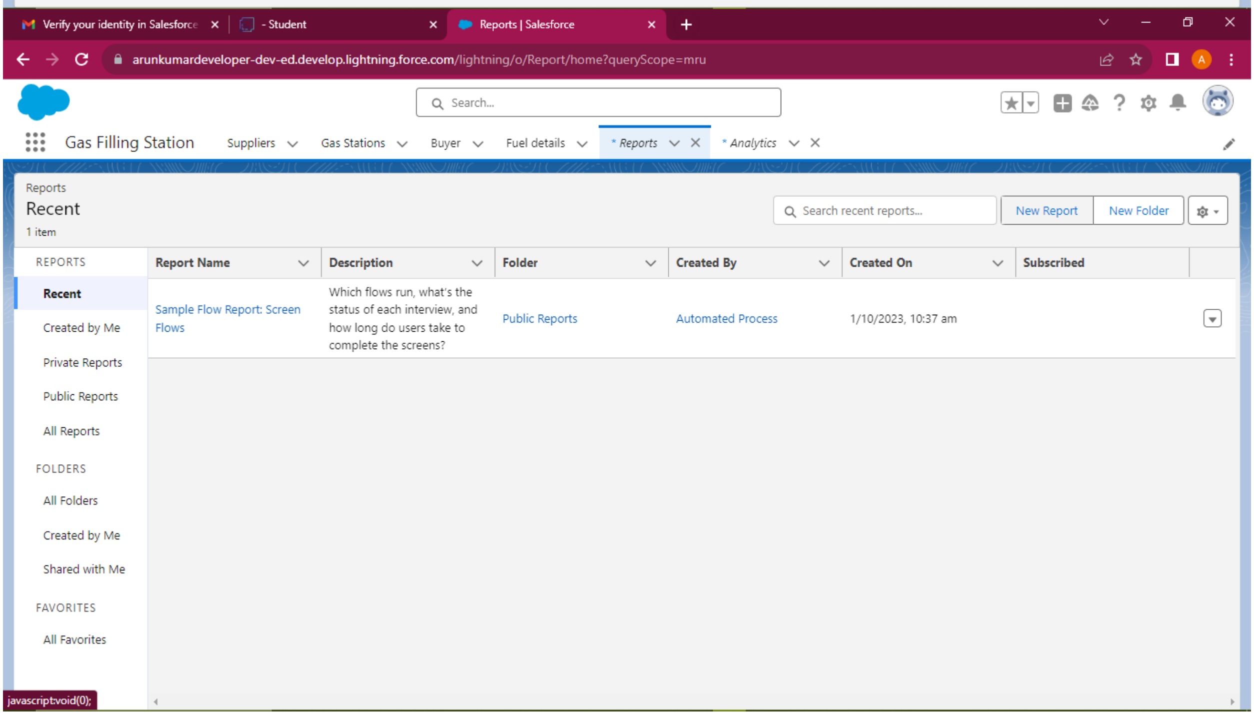


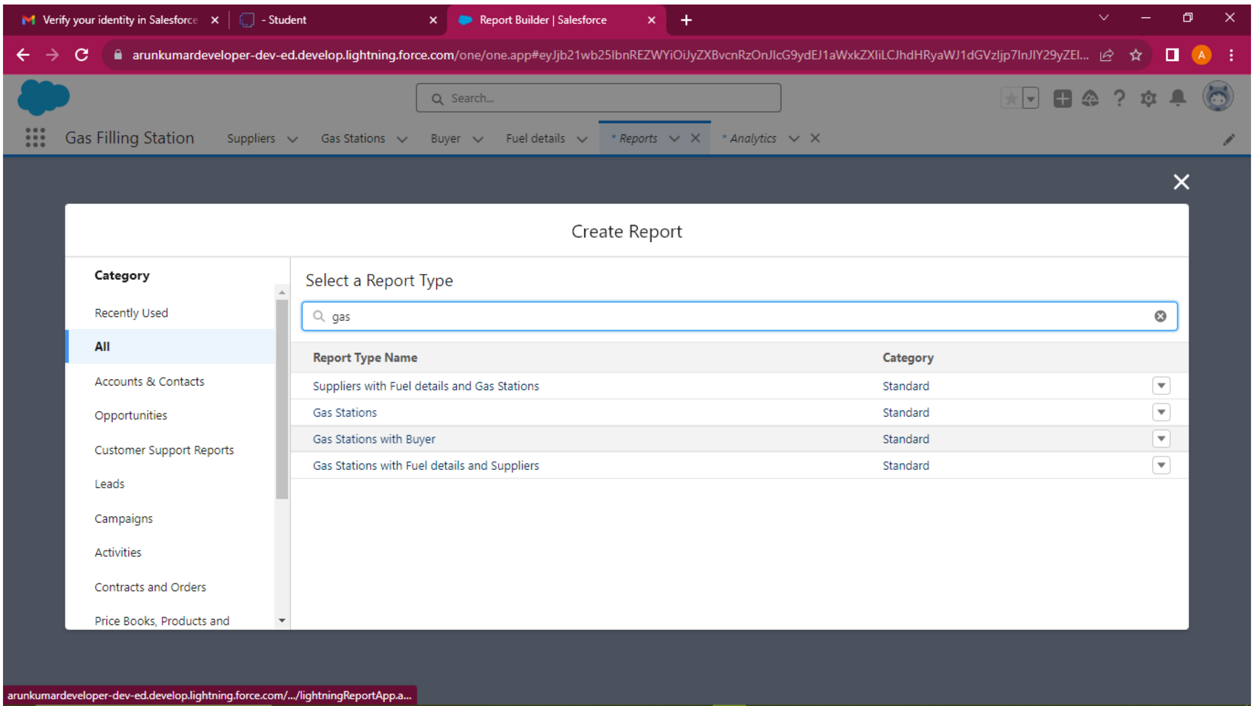
Gas Filling Station
Reports
All Folders
6 items
New Report
New Folder
Name
Created By
Created On
Last Modified By
Last Modified Date
Einstein Bot Reports
Einstein Bot Reports Spring '23
Einstein Bot Reports Summer '23
Einstein Bot Reports Summer '22
Einstein Bot Reports Winter '23
Fuel Estimation
Automated Process
Arunkumar R
1/10/2023, 10:37 am
17/10/2023, 9:12 pm
Favorite
Share
Rename
Delete

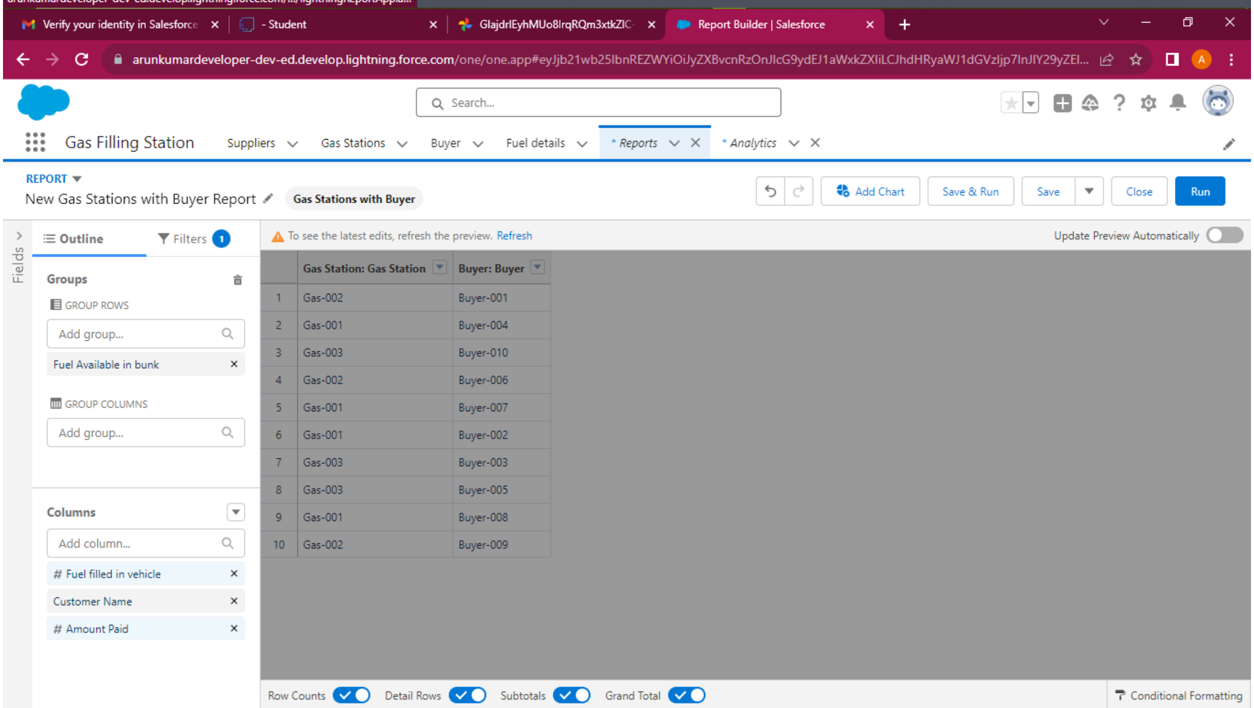


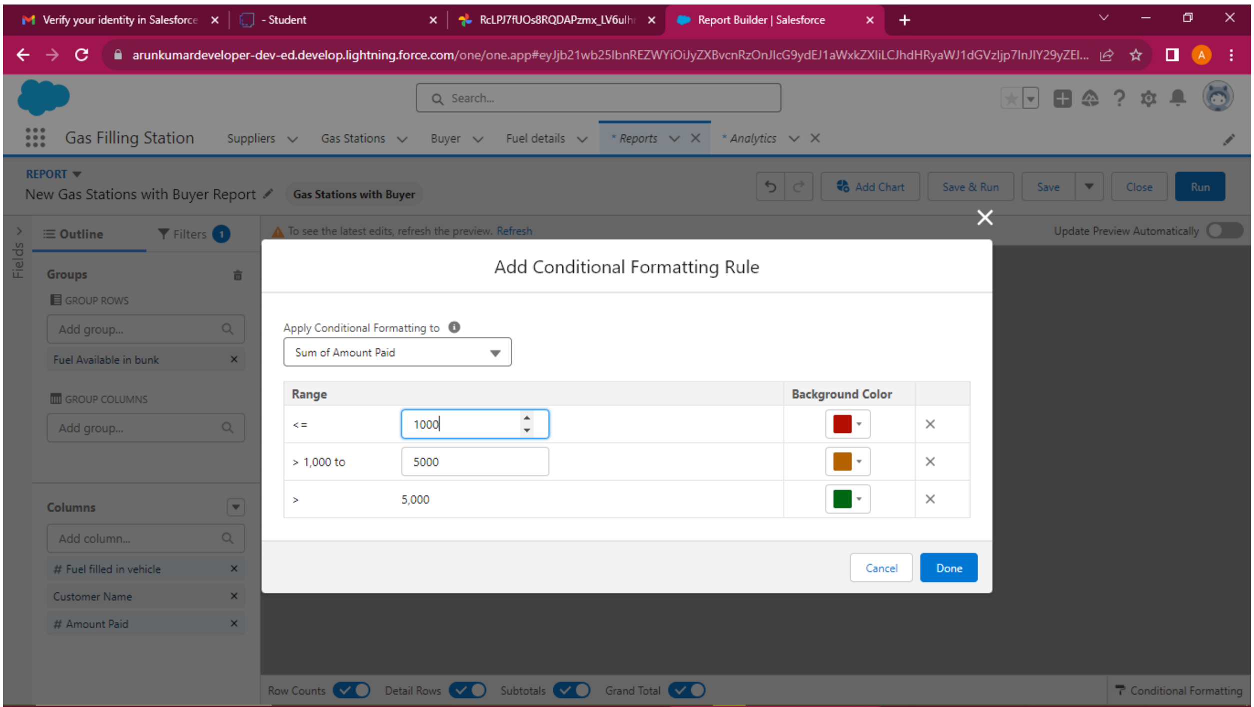
Share folder
These sharing settings apply to all subfolders in this folder.
Share With
Roles
Names
Manager
Access
View
Share
Who Can Access
Arunkumar R
Users
Manage
Done

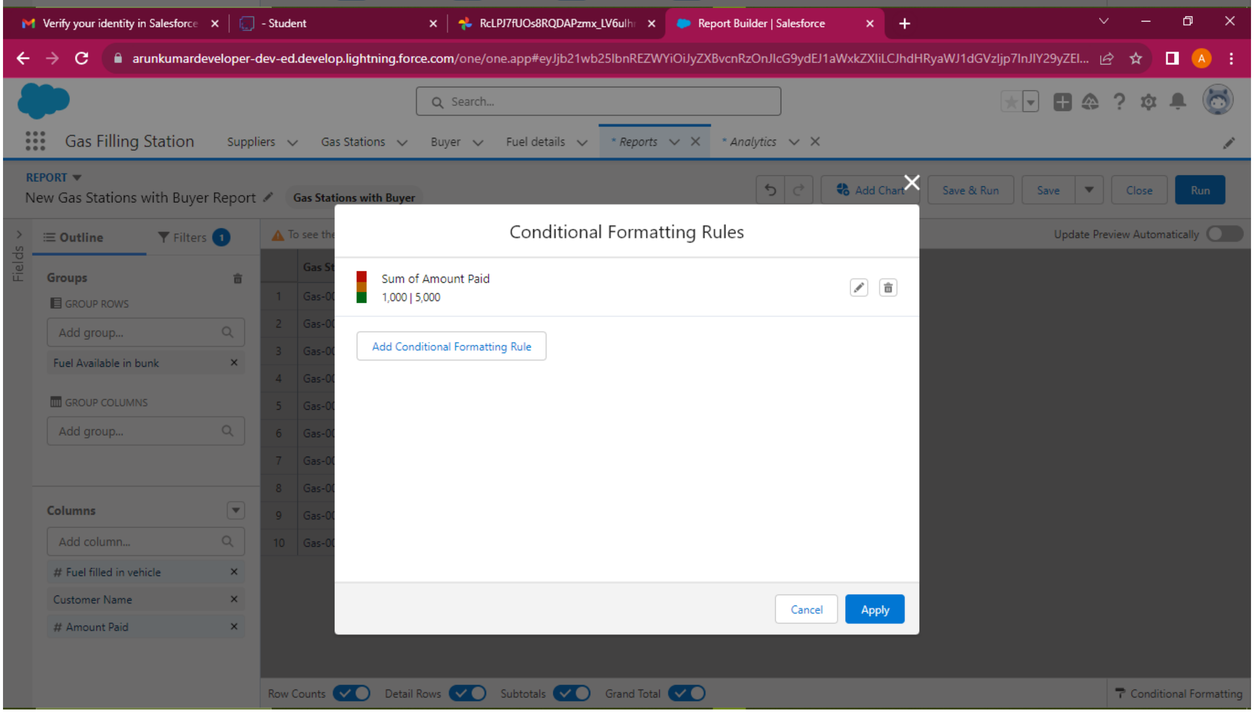

Verify your identity in Salesf
- Student
Reports | Salesforce
Buyer | Salesforce
Recently Viewed | Buyer | Sa
arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/o/Buyer__c/list?filterName=Recent
Search...
Gas Filling Station
Suppliers
Gas Stations
Buyer
Fuel details
* Reports
* Analytics
Buyer
Recently Viewed
New
Import
10 items • Updated a few seconds ago
Search this list...
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

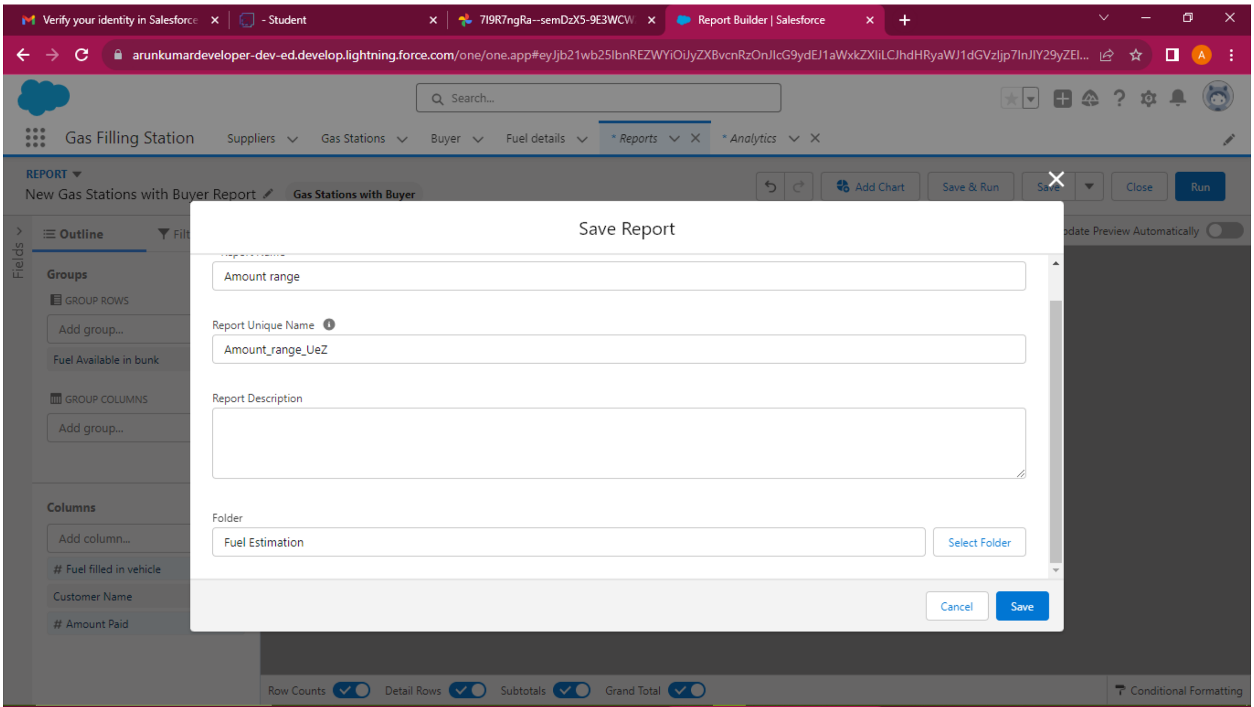

Verify your identity in Salesforce
- Student
Reports | Salesforce
arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru
Search...
Gas Filling Station
Suppliers
Gas Stations
Buyer
Fuel details
* Reports
* Analytics
Reports
Recent
1 item
Search recent reports...
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Report Name
Description
Folder
Created By
Created On
Subscribed
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
javascript:void(0);

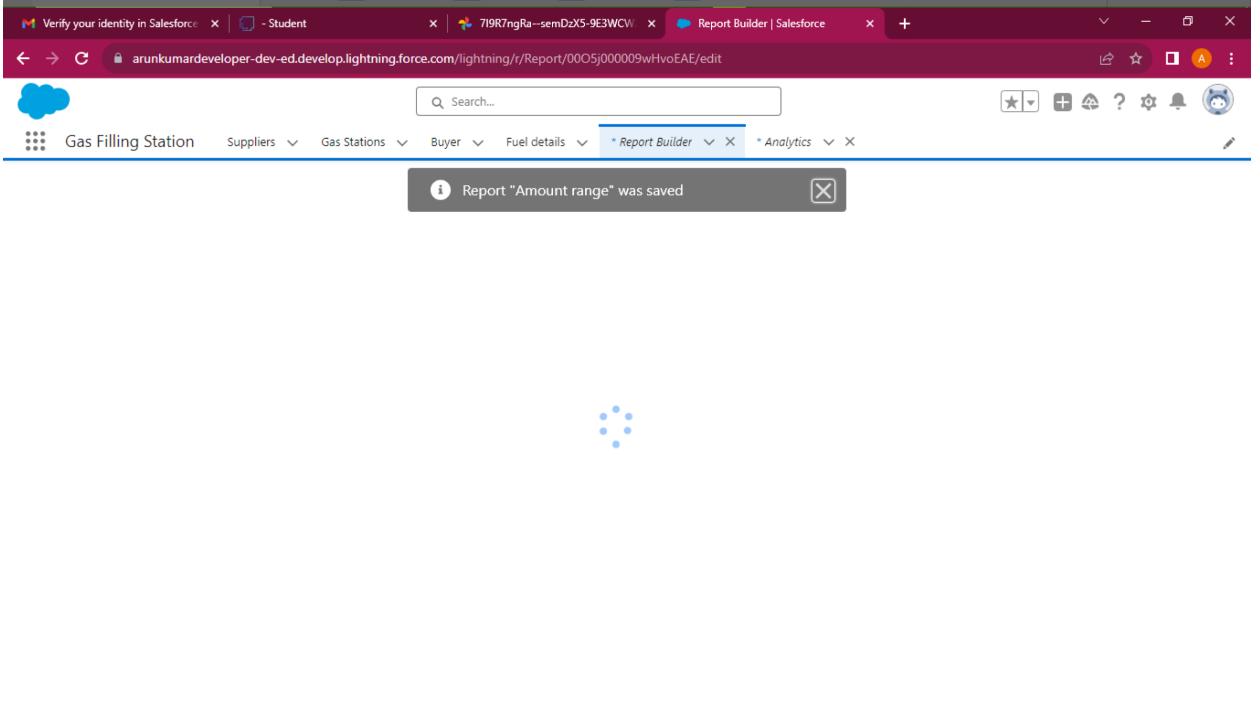

Verify your identity in Salesforce
- Student
Report Builder | Salesforce
arunkumardeveloper-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJyZXBvcnRzOnJlcG9ydE1aWxkZXIiLCJhdHRyaWJ1dGVzIjp7InJlY29yZEl...
Search...
Gas Filling Station
Suppliers
Gas Stations
Buyer
Fuel details
* Reports
* 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
gas
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.a...

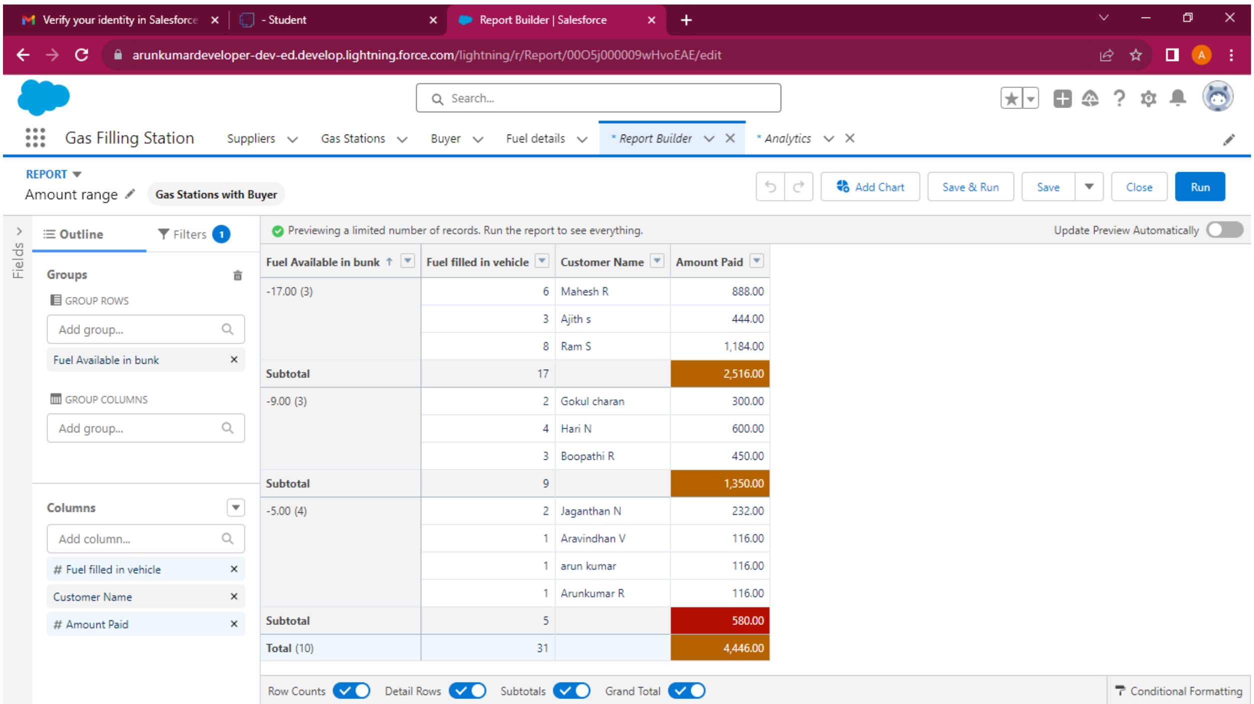

Verify your identity in Salesforce
- Student
GlajdrlEyhMUo8lrqRQm3xtkZIC
Report Builder | Salesforce
arunkumardeveloper-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJyZXBvcnRzOnJlcG9ydE1aWxkZXIiLCJhdHRyaWJ1dGVzIjp7InJlY29yZEl...
Search...
Gas Filling Station
Suppliers
Gas Stations
Buyer
Fuel details
* Reports
* Analytics
REPORT
New Gas Stations with Buyer Report
Gas Stations with Buyer
Add Chart
Save & Run
Save
Close
Run
Fields
Outline
Filters 1
Groups
GROUP ROWS
Add group...
Fuel Available in bunk
GROUP COLUMNS
Add group...
Columns
Add column...
Fuel filled in vehicle
Customer Name
Amount Paid
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


Gas Filling Station
Suppliers
Gas Stations
Buyer
Fuel details
Reports
Analytics
REPORT
New Gas Stations with Buyer Report
Gas Stations with Buyer
Add Chart
Save & Run
Save
Close
Run
Outline
Filters
Groups
GROUP ROWS
Fuel Available in bunk
GROUP COLUMNS
Columns
Fuel filled in vehicle
Customer Name
Amount Paid
To see the latest edits, refresh the preview. Refresh
Update Preview Automatically
Add Conditional Formatting Rule
Apply Conditional Formatting to
Sum of Amount Paid
Range
Background Color
<=
1000
> 1,000 to
5000
>
5,000
Cancel
Done
Row Counts
Detail Rows
Subtotals
Grand Total
Conditional Formatting


Gas Filling Station
Suppliers
Gas Stations
Buyer
Fuel details
Reports
Analytics
REPORT
New Gas Stations with Buyer Report
Gas Stations with Buyer
Save & Run
Save
Close
Run
Outline
Filters
Groups
GROUP ROWS
Fuel Available in bunk
GROUP COLUMNS
Columns
Fuel filled in vehicle
Customer Name
Amount Paid
Update Preview Automatically
Conditional Formatting Rules
Sum of Amount Paid
1,000 | 5,000
Add Conditional Formatting Rule
Cancel
Apply
Row Counts
Detail Rows
Subtotals
Grand Total
Conditional Formatting


Save Report
Amount range
Report Unique Name
Amount_range_UeZ
Report Description
Folder
Fuel Estimation
Select Folder
Cancel
Save
Gas Filling Station
New Gas Stations with Buyer Report
Gas Stations with Buyer

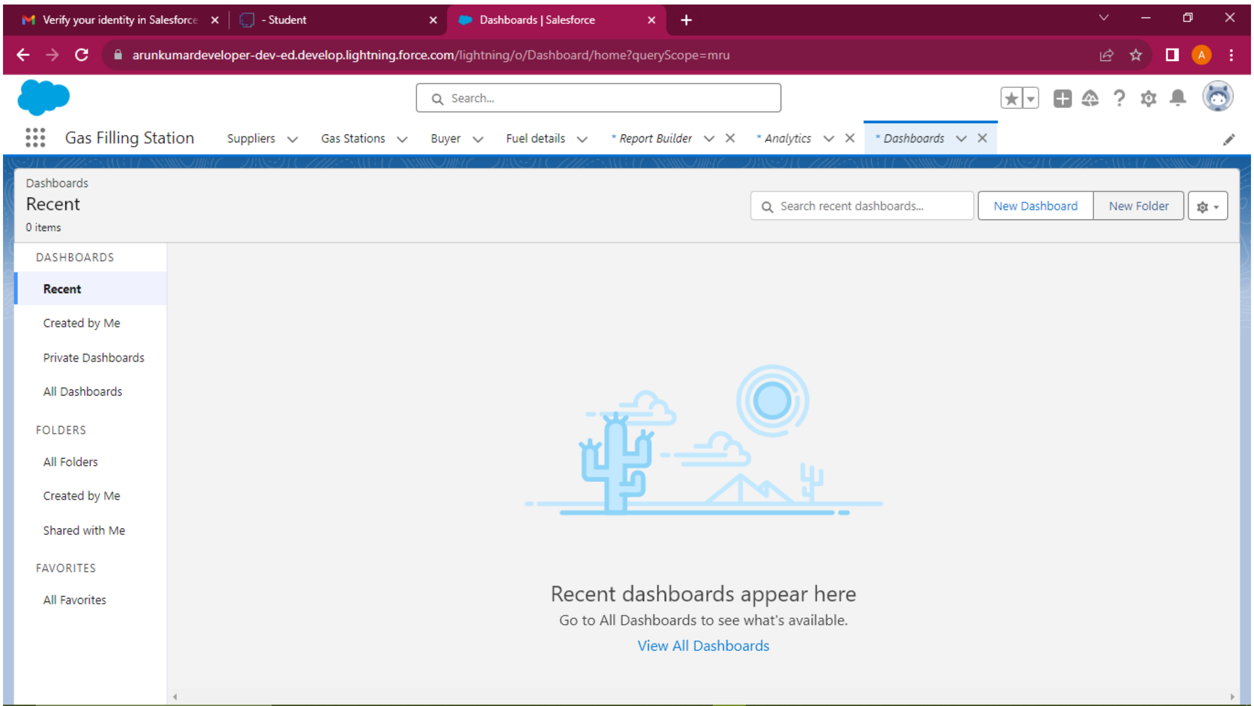

arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/r/Report/00O5j000009wHvoEAE/edit
Gas Filling Station
Report "Amount range" was saved

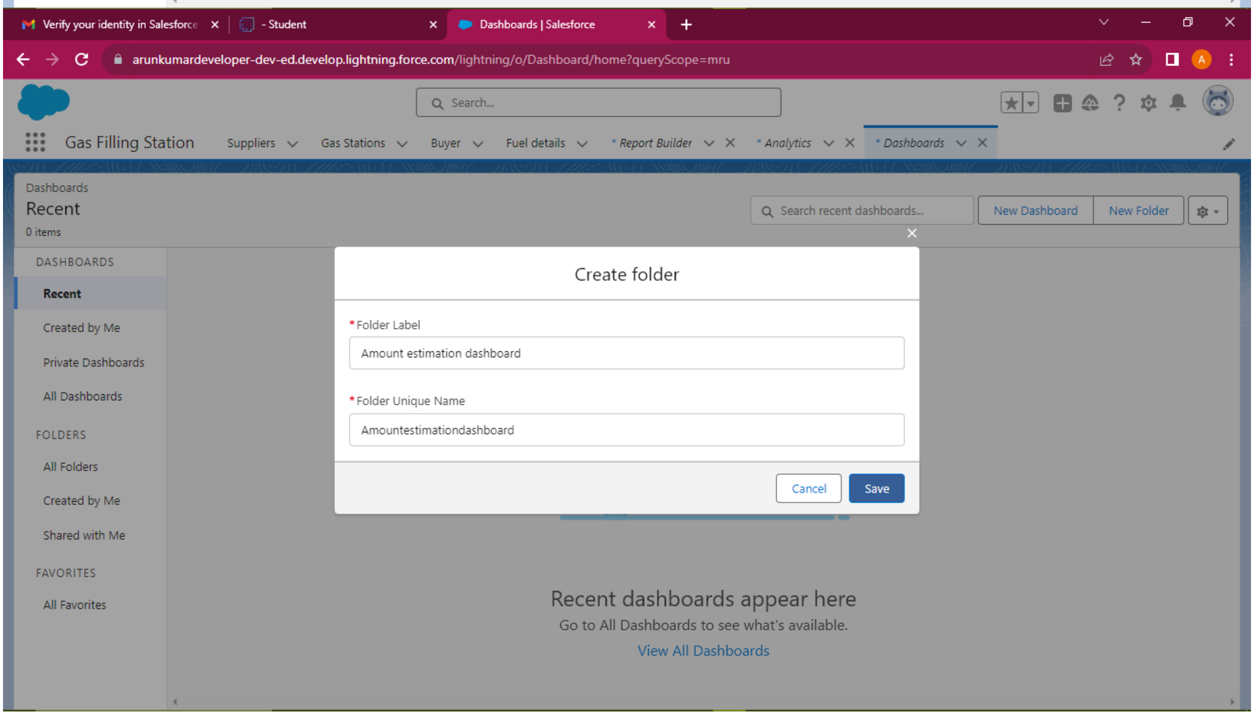


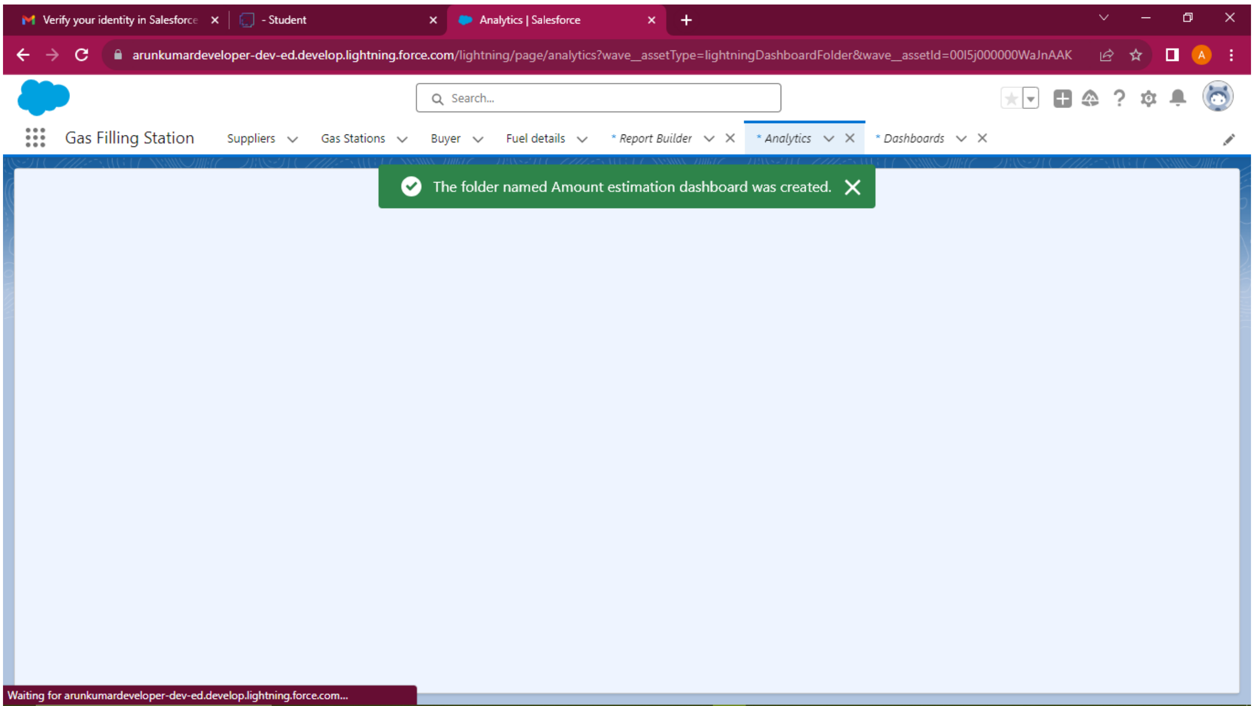
5.2 Dashboard

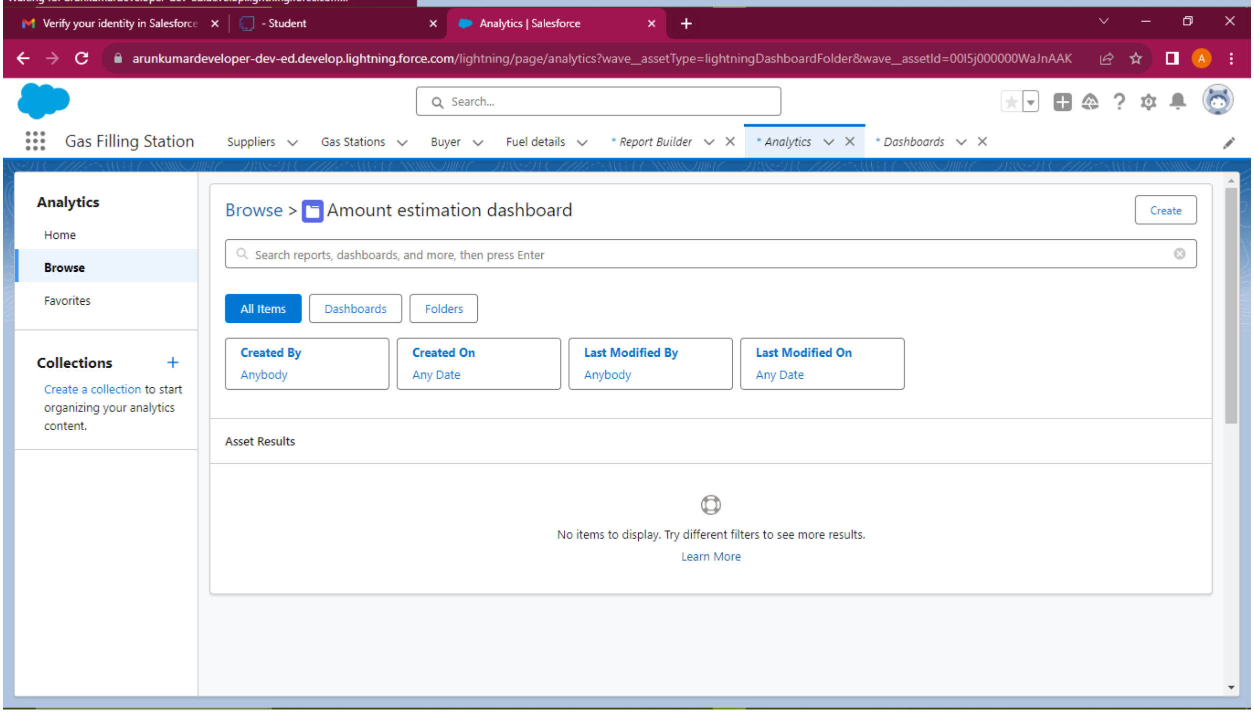
A dashboard provides an interactive visual display of key metrics and trends. Multiple dashboard components can be shown together on a single dashboard layout, creating rich visual displays of multiple reports that have a common theme.

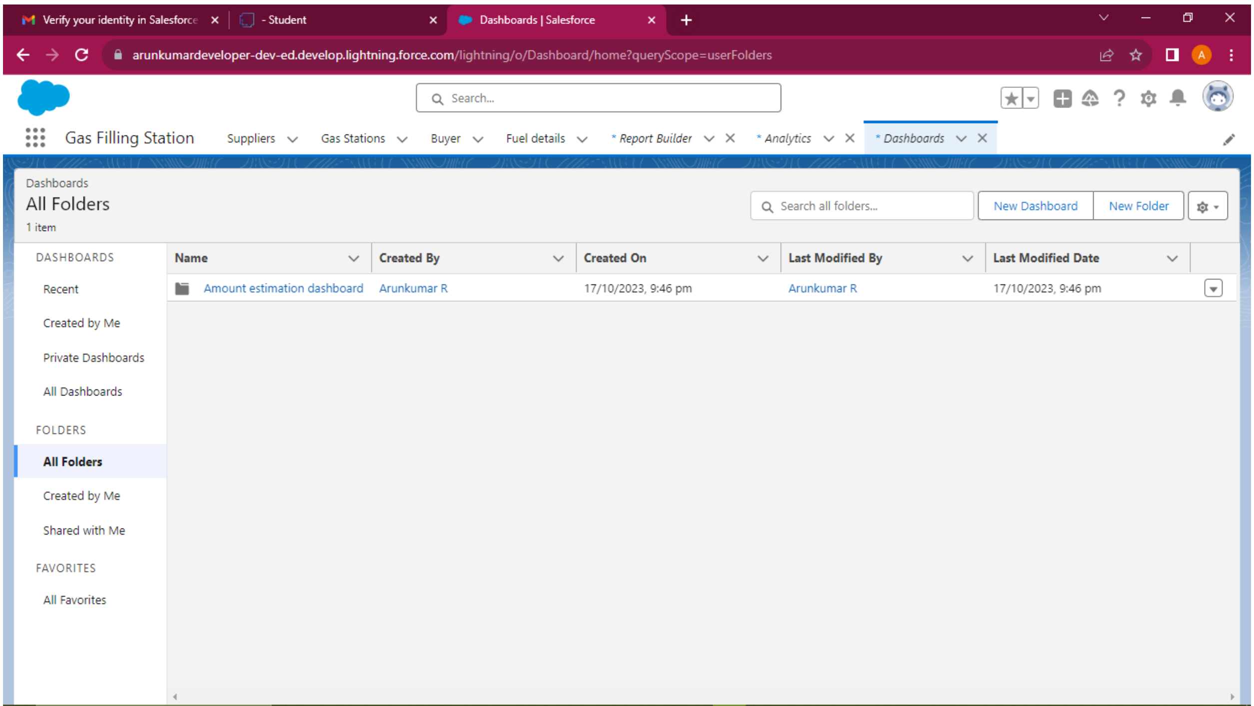
View Dashboard

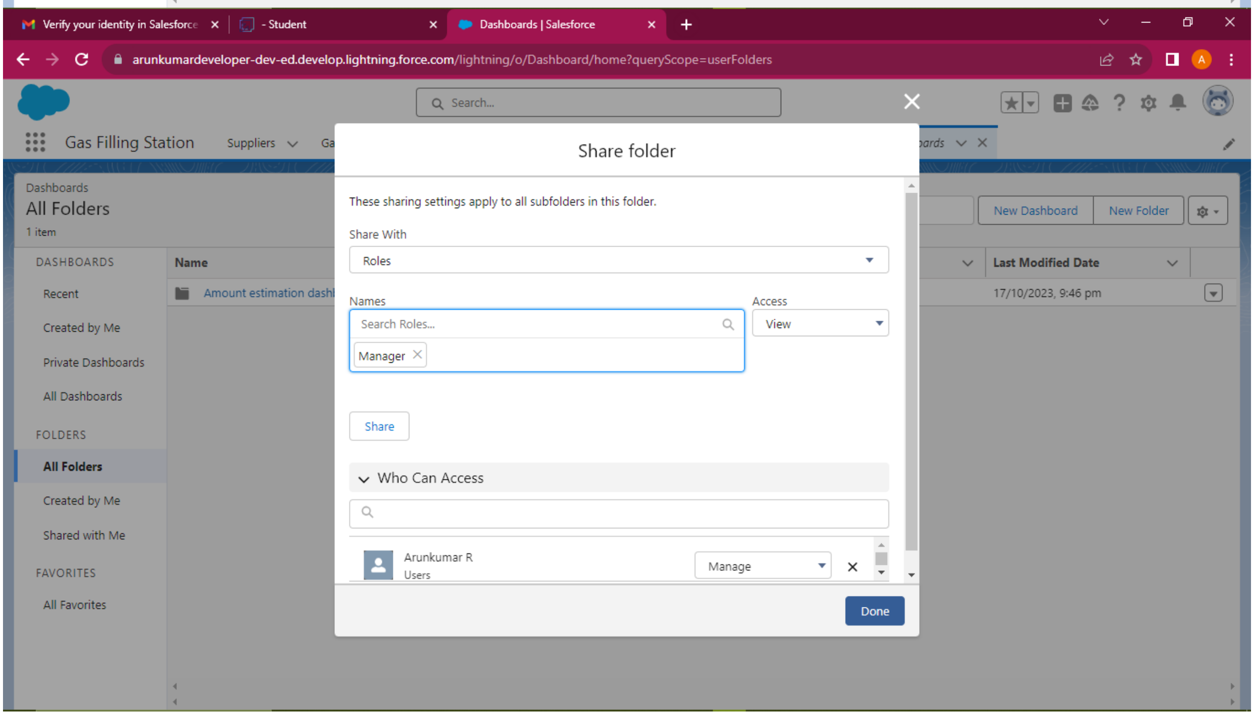

Verify your identity in Salesforce
- Student
Dashboards | Salesforce
arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru
Search...
Gas Filling Station
Suppliers
Gas Stations
Buyer
Fuel details
* Report Builder
* Analytics
* Dashboards
Dashboards
Recent
0 items
Search recent dashboards...
New Dashboard
New Folder
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


Verify your identity in Salesforce
- Student
Dashboards | Salesforce
arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru
Search...
Gas Filling Station
Suppliers
Gas Stations
Buyer
Fuel details
* Report Builder
* Analytics
* Dashboards
Dashboards
Recent
0 items
Search recent dashboards...
New Dashboard
New Folder
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


Verify your identity in Salesforce
- Student
Analytics | Salesforce
arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/page/analytics?wave__assetType=lightningDashboardFolder&wave__assetId=00l5j000000WaJnAAK
Search...
Gas Filling Station
Suppliers
Gas Stations
Buyer
Fuel details
* Report Builder
* Analytics
* Dashboards
The folder named Amount estimation dashboard was created.
Waiting for arunkumardeveloper-dev-ed.develop.lightning.force.com...


Verify your identity in Salesforce
- Student
Analytics | Salesforce
arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/page/analytics?wave__assetType=lightningDashboardFolder&wave__assetId=00l5j000000WaJnAAK
Search...
Gas Filling Station
Suppliers
Gas Stations
Buyer
Fuel details
* Report Builder
* Analytics
* Dashboards
Analytics
Home
Browse
Favorites
Collections
Create a collection to start organizing your analytics content.
Browse > Amount estimation dashboard
Create
Search reports, dashboards, and more, then press Enter
All Items
Dashboards
Folders
Created By
Anybody
Created On
Any Date
Last Modified By
Anybody
Last Modified On
Any Date
Asset Results
No items to display. Try different filters to see more results.
Learn More


Verify your identity in Salesforce
- Student
Dashboards | Salesforce
arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=userFolders
Search...
Gas Filling Station
Suppliers
Gas Stations
Buyer
Fuel details
* Report Builder
* Analytics
* Dashboards
Dashboards
All Folders
1 item
Search all folders...
New Dashboard
New Folder
DASHBOARDS
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Name
Created By
Created On
Last Modified By
Last Modified Date
Amount estimation dashboard
Arunkumar R
17/10/2023, 9:46 pm
Arunkumar R
17/10/2023, 9:46 pm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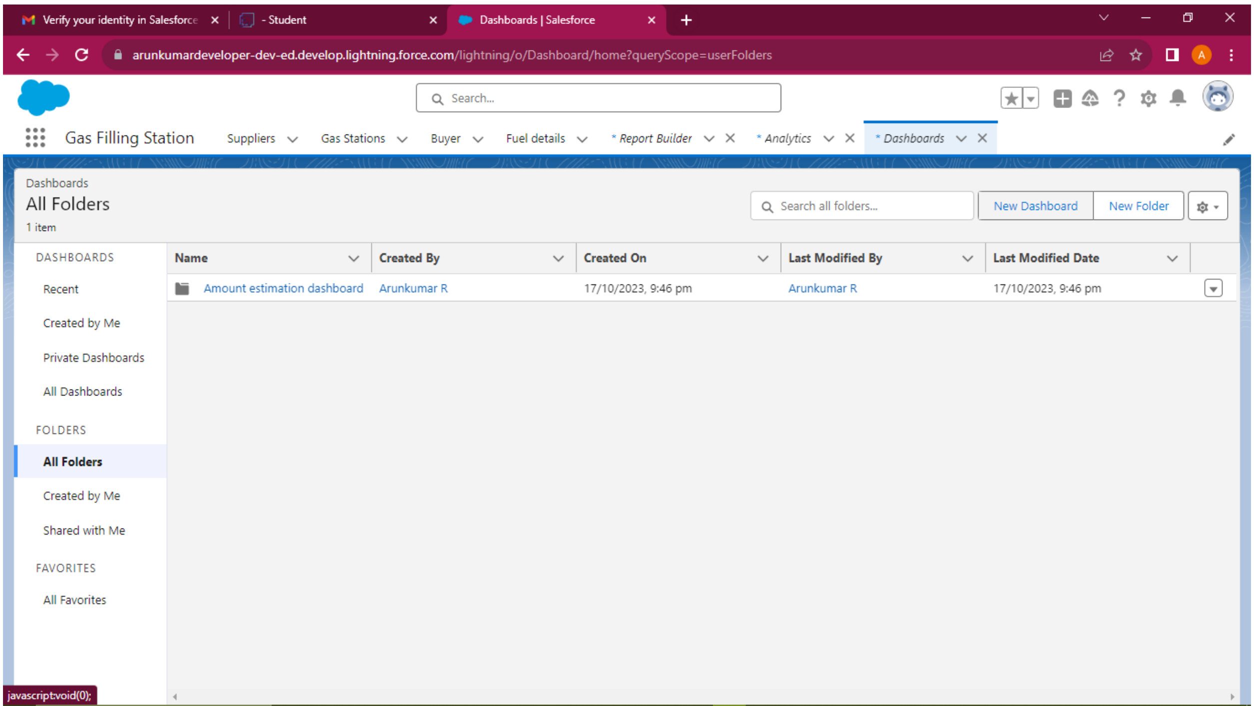
- Student
Dashboards | Salesforce
arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=userFolders
Share folder
These sharing settings apply to all subfolders in this folder.
Share With
Roles
Names
Search Roles...
Manager
Access
View
Share
Who Can Access
Arunkumar R
Users
Manage
Done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arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=userFolders
Search...
Gas Filling Station
Suppliers
Gas Stations
Buyer
Fuel details
* Report Builder
* Analytics
* Dashboards
Dashboards
All Folders
1 item
Search all folders...
New Dashboard
New Folder
DASHBOARDS
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Name
Created By
Created On
Last Modified By
Last Modified Date
Amount estimation dashboard
Arunkumar R
17/10/2023, 9:46 pm
Arunkumar R
17/10/2023, 9:46 pm
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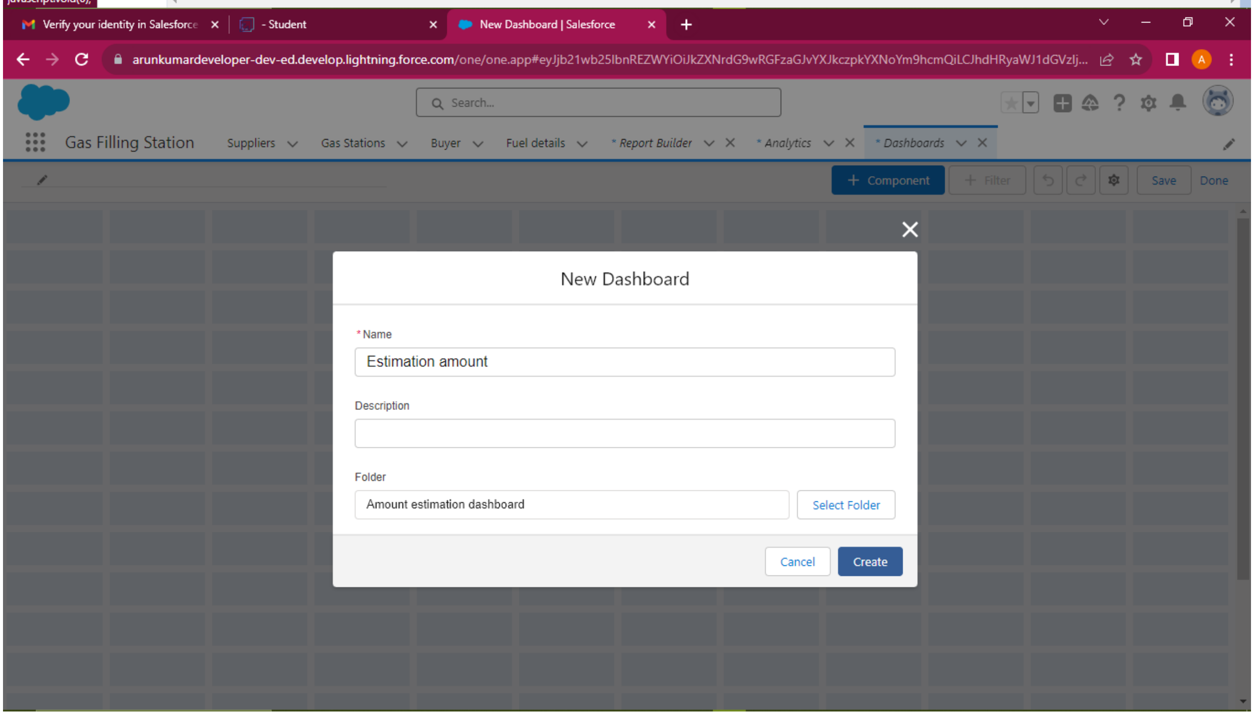
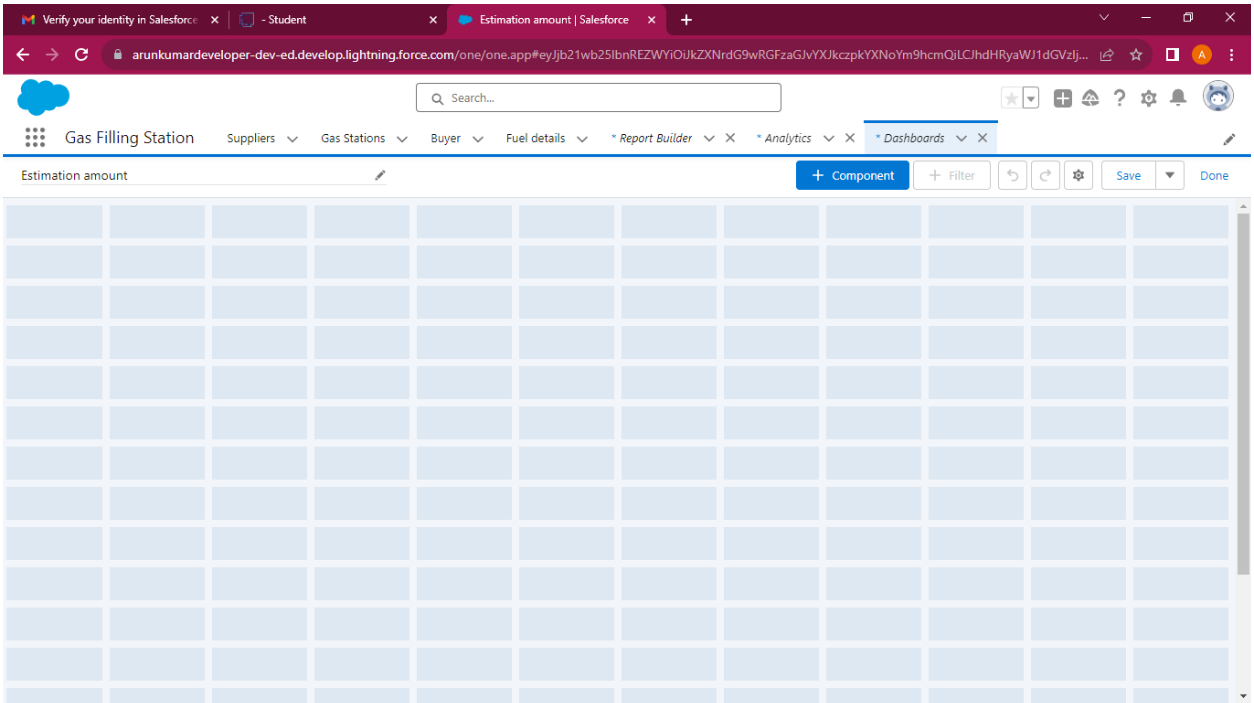

Verify your identity in Salesforce
- Student
New Dashboard | Salesforce
Search...
Gas Filling Station
Suppliers
Gas Stations
Buyer
Fuel details
* Report Builder
* Analytics
* Dashboards
Component
Filter
Save
Done
New Dashboard
* Name
Estimation amount
Description
Folder
Amount estimation dashboard
Select Folder
Cancel
Create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- Student
Estimation amount | Salesforce
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Component
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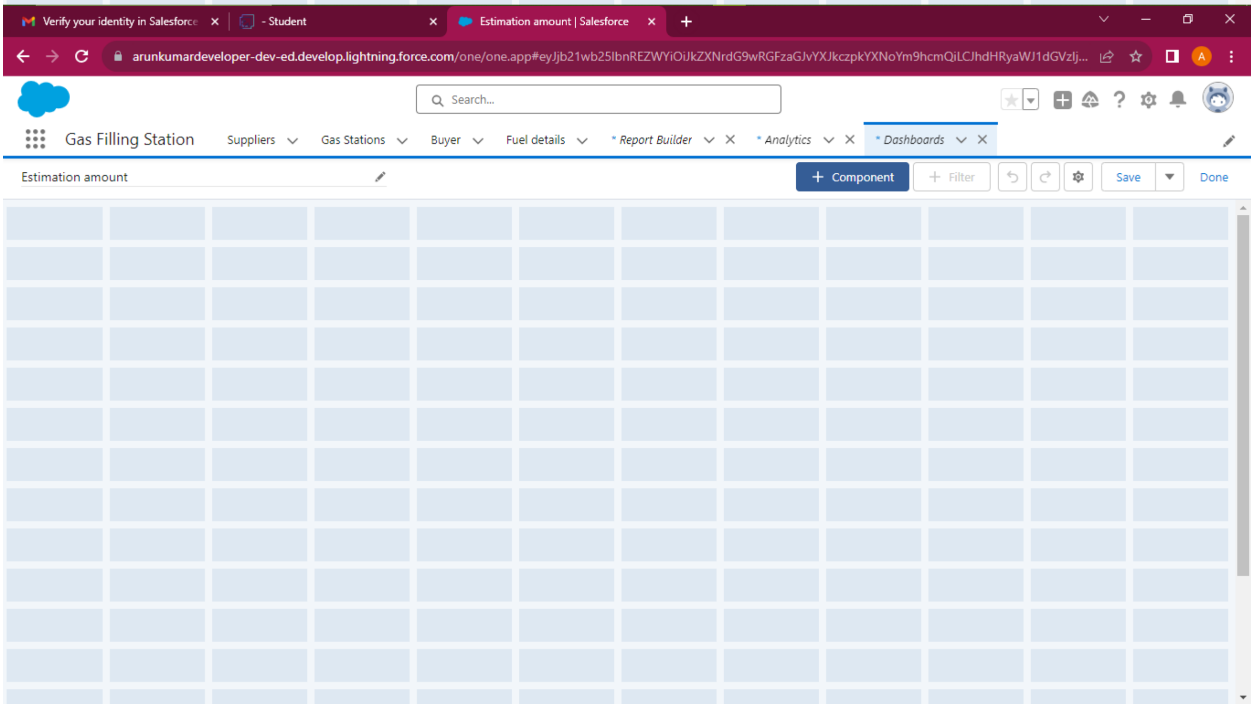
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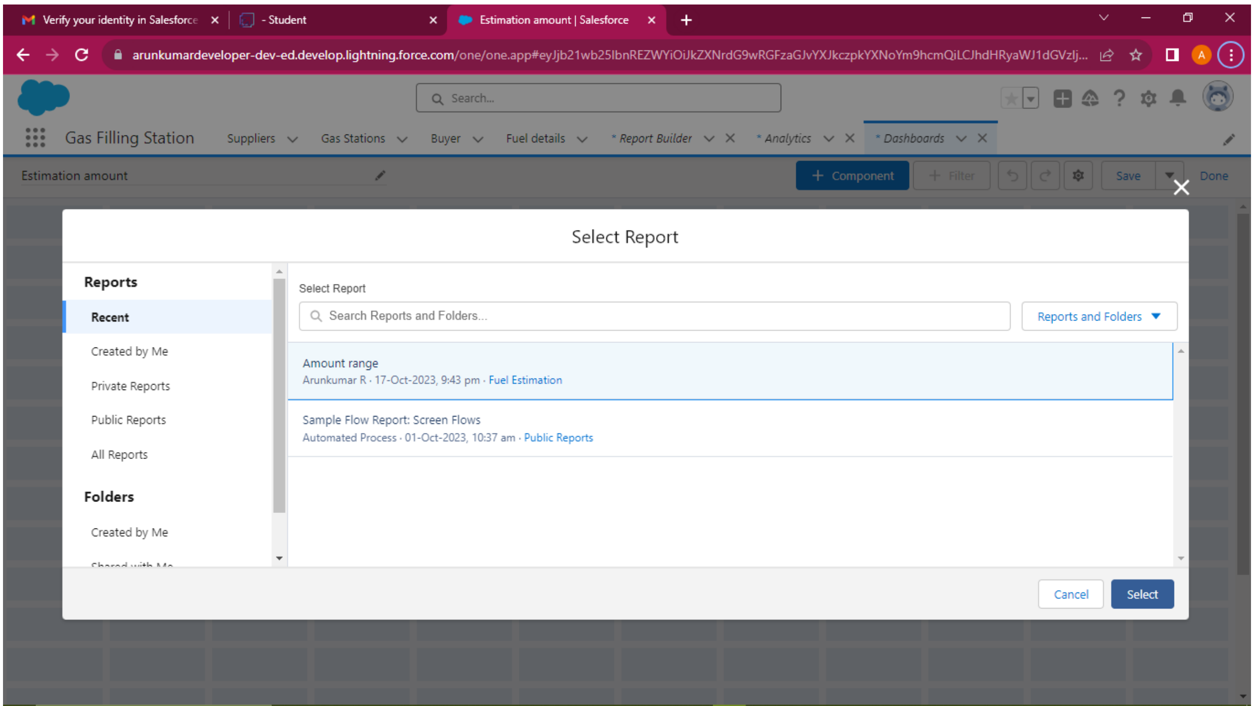
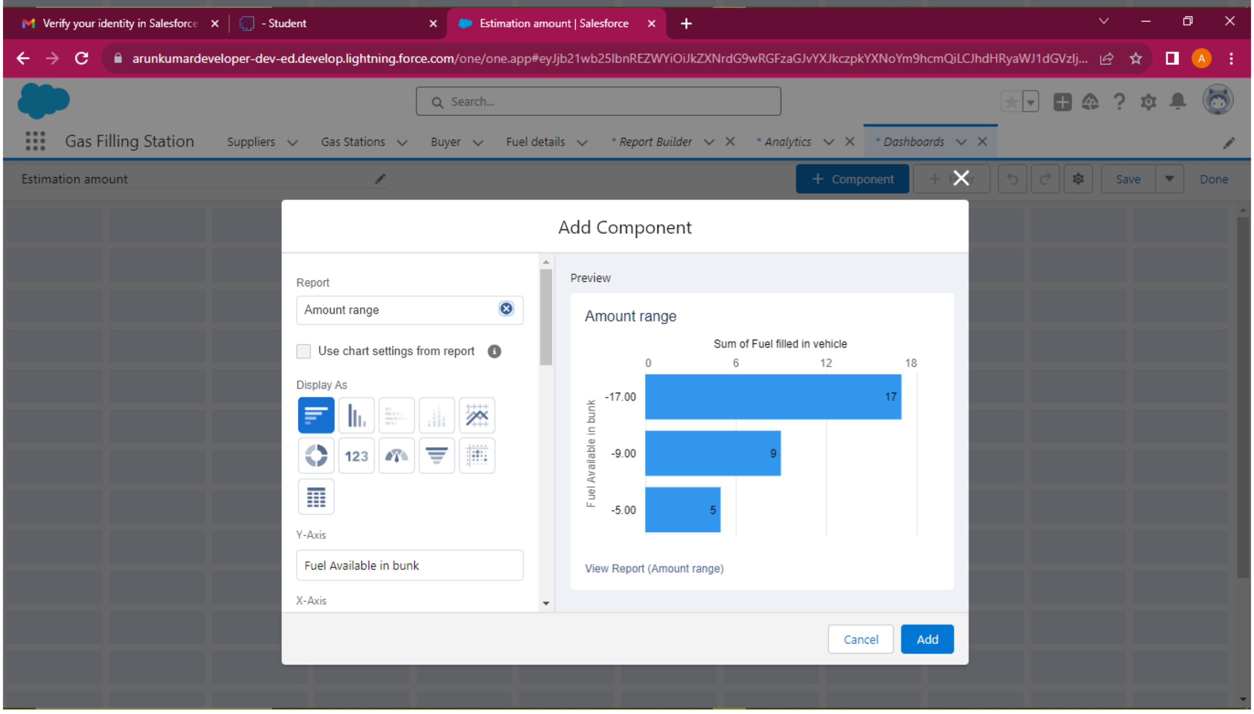
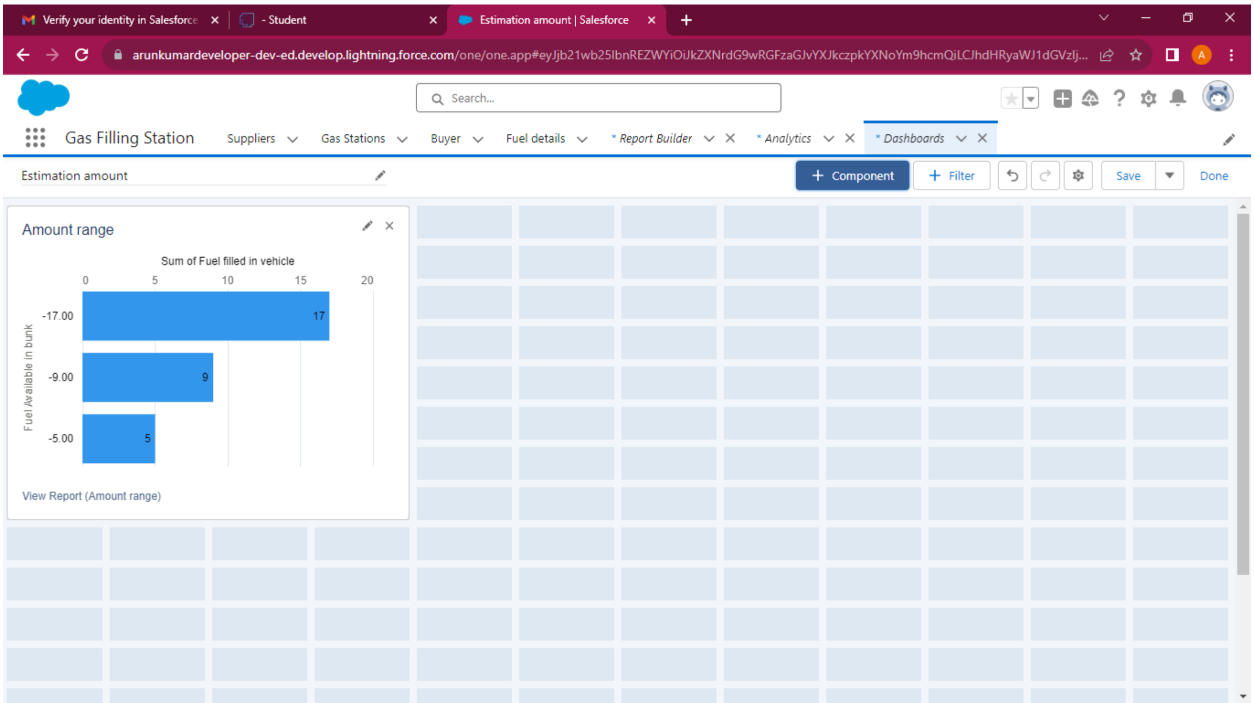
* Analytics
* Dashboards
Estimation amount
Component
Filter
Save
Done


Select Report
Reports
Recent
Created by Me
Private Reports
Public Reports
All Reports
Folders
Created by Me
Select Report
Search Reports and Folders...
Reports and Folders
Amount range
Arunkumar R · 17-Oct-2023, 9:43 pm · Fuel Estimation
Sample Flow Report: Screen Flows
Automated Process · 01-Oct-2023, 10:37 am · Public Reports
Cancel
Select


Add Component
Report
Amount range
Use chart settings from report
Display As
123
Y-Axis
Fuel Available in bunk
X-Axis
Preview
Amount range
Sum of Fuel filled in vehicle
0
6
12
18
-17.00
17
-9.00
9
-5.00
5
Fuel Available in bunk
View Report (Amount range)
Cancel
Add


Verify your identity in Salesforce
- Student
Estimation amount | Salesforce
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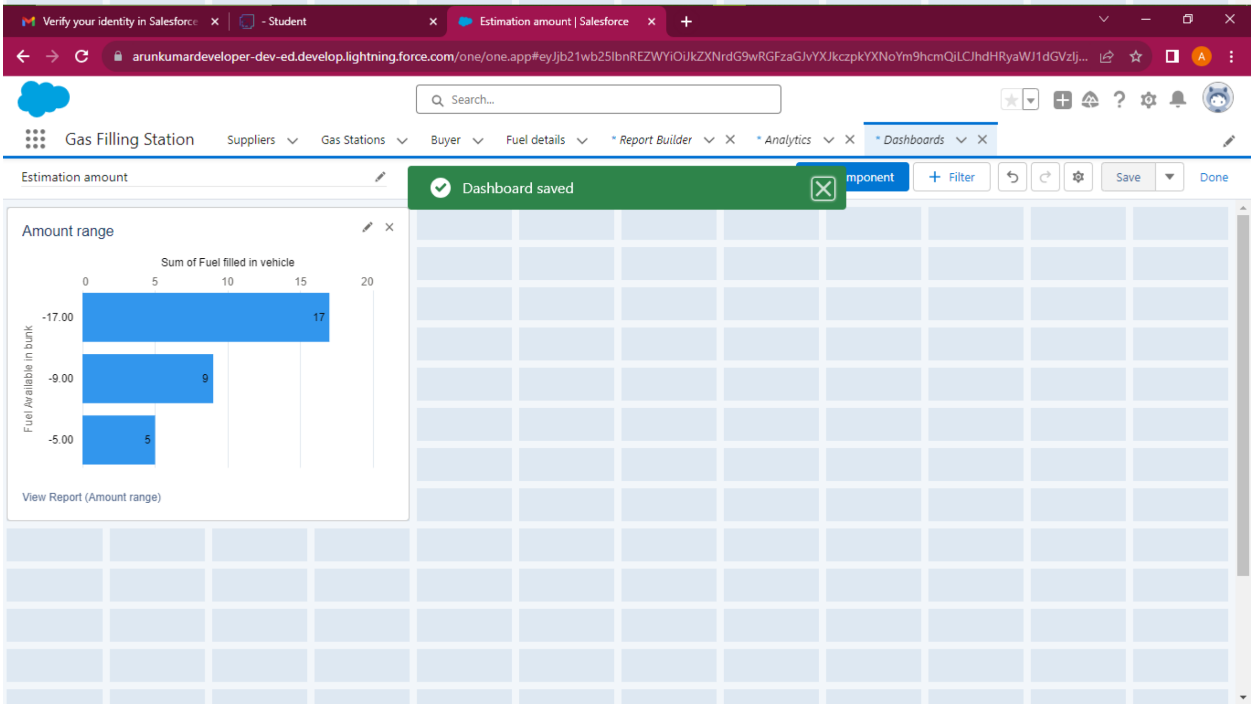
Search...
Gas Filling Station
Suppliers
Gas Stations
Buyer
Fuel details
* Report Builder
* Analytics
* Dashboards
Estimation amount
Component
Filter
Save
Done
Amount range
Sum of Fuel filled in vehicle
Fuel Available in bunk
-17.00
-9.00
-5.00
View Report (Amount range)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- Student
Estimation amount | Salesforce
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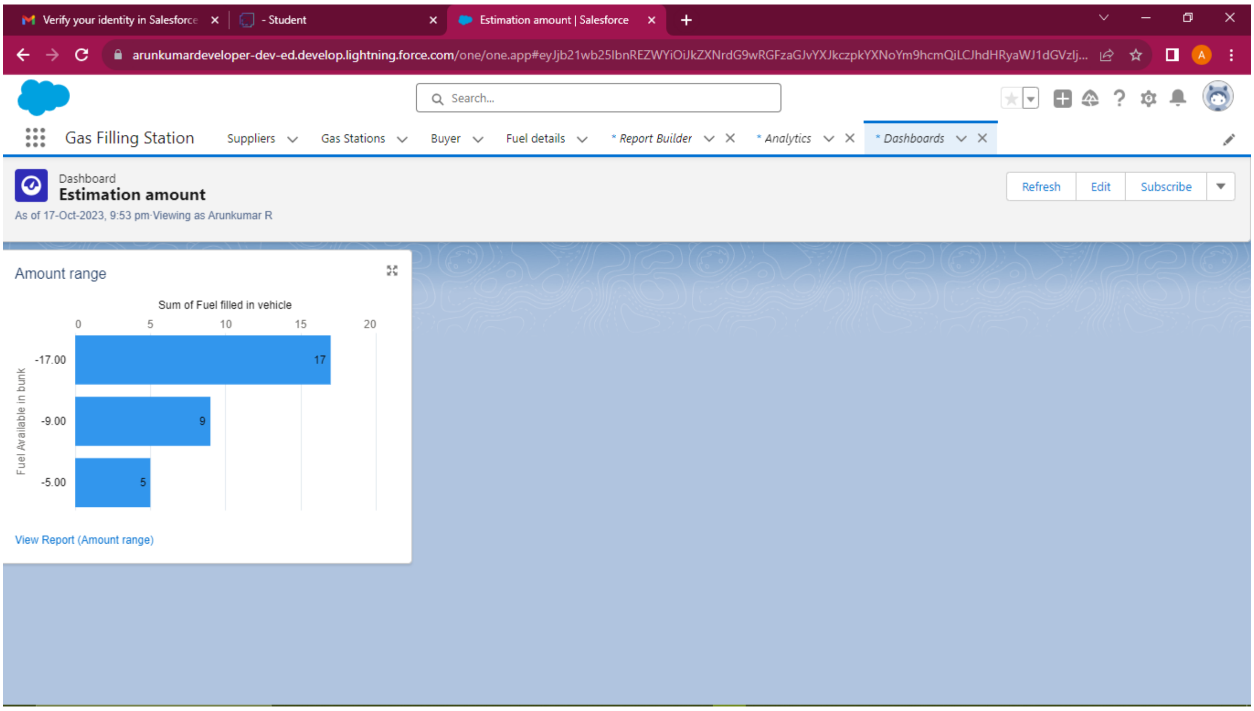
Search...
Gas Filling Station
Suppliers
Gas Stations
Buyer
Fuel details
* Report Builder
* Analytics
* Dashboards
Estimation amount
Dashboard saved
Filter
Save
Done
Amount range
Sum of Fuel filled in vehicle
Fuel Available in bunk
-17.00
-9.00
-5.00
View Report (Amount range)



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

Demo link:

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