

Application to make the gas filling station easy using CRM



NAAN MUDHALVAN

PROJECT REPORT

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BONAFIDE CERTIFICATE

Certified that this project report “**Application to make the gas filling station easy using CRM**” is the bonafide work of “**AJITH S (au620120104002), ARUNKUMAR R (au620120104310), JEGADHEESWARAN B (au620120104041), JAGANATHANN(au620120104037), Boopathi(au620120104015)**” who carried out the project work under my supervision.

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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

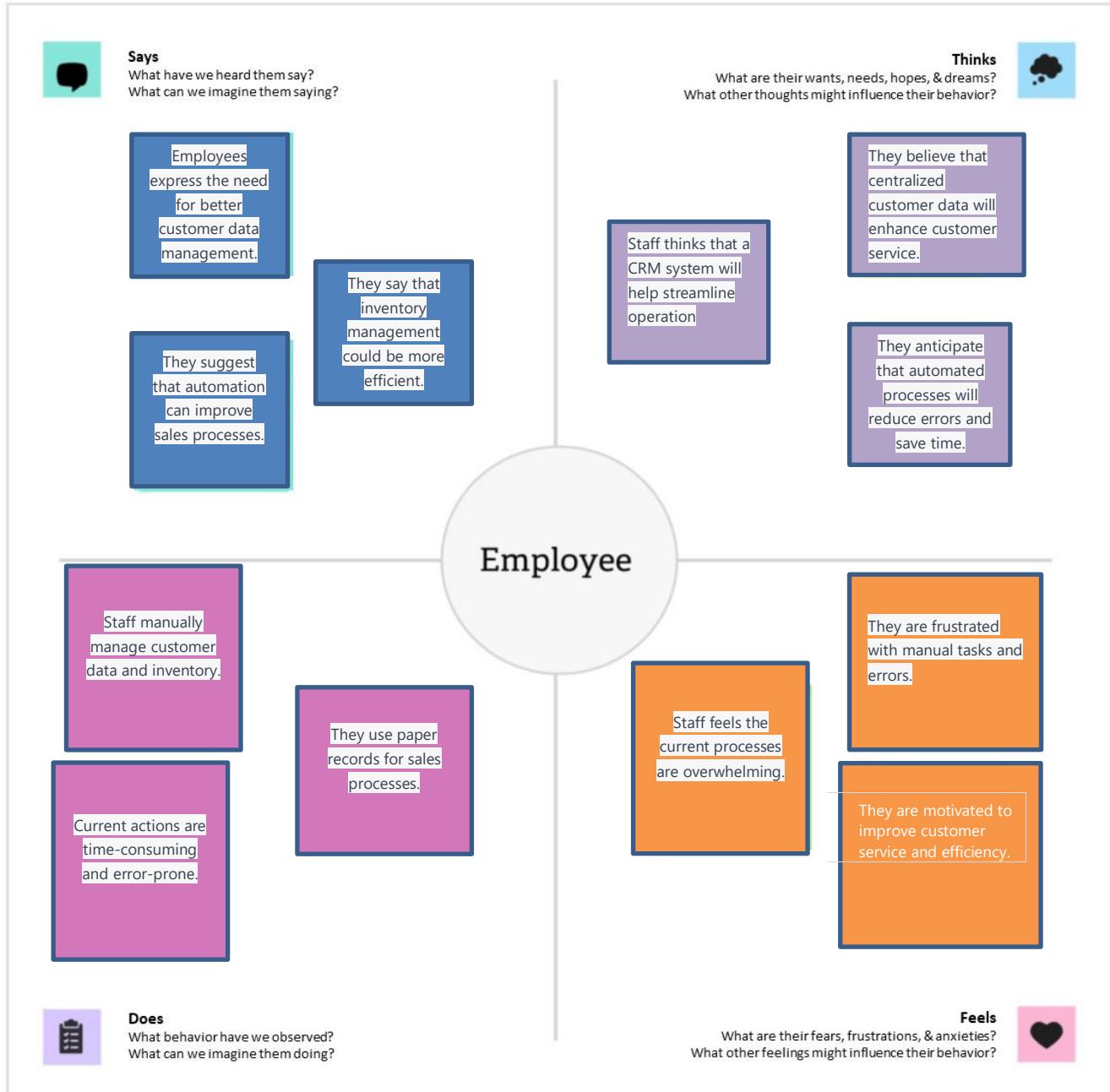
An empathy map is a simple, easy-to-digest visual that captures knowledge about a user's behavior and attitudes.

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.	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

1.5.1 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.

1.5.2 Technical Requirements

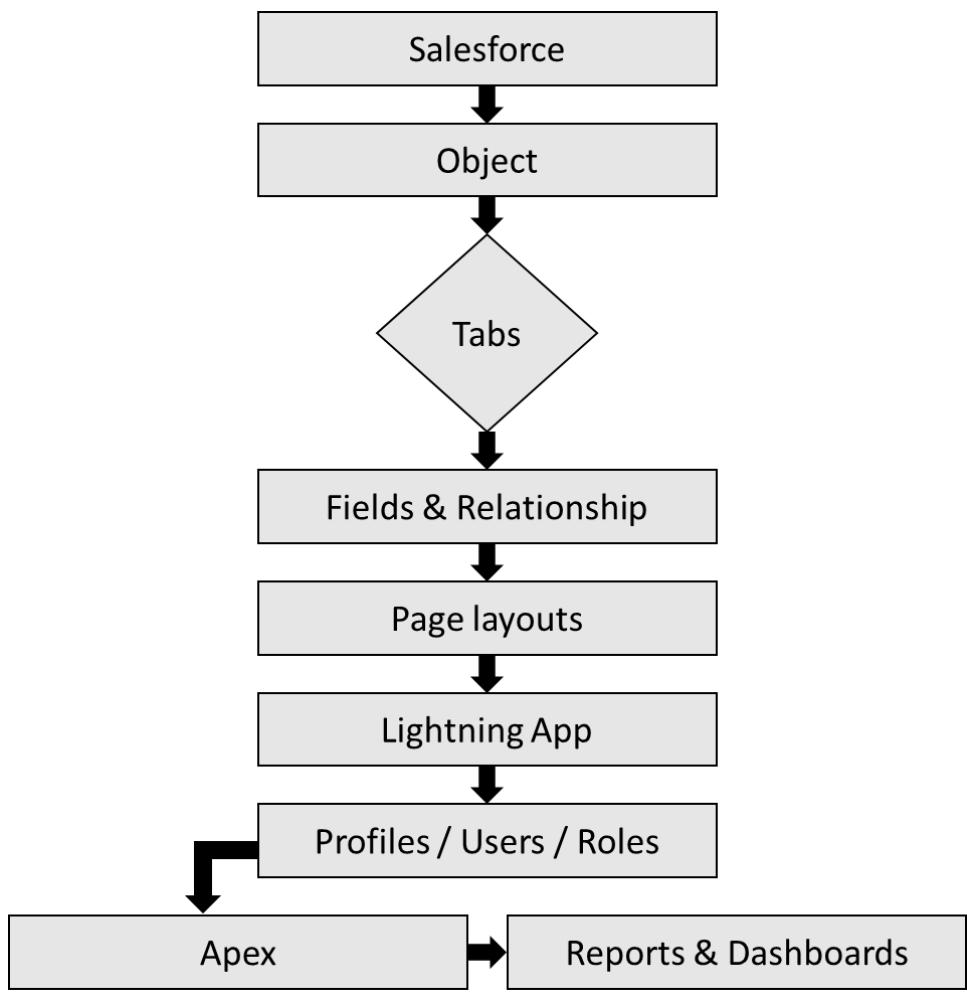
Requirement	Description
Scalability:	The CRM system should be scalable to accommodate the potential growth of our business. It should handle an increasing volume of customer data and transactions

	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.

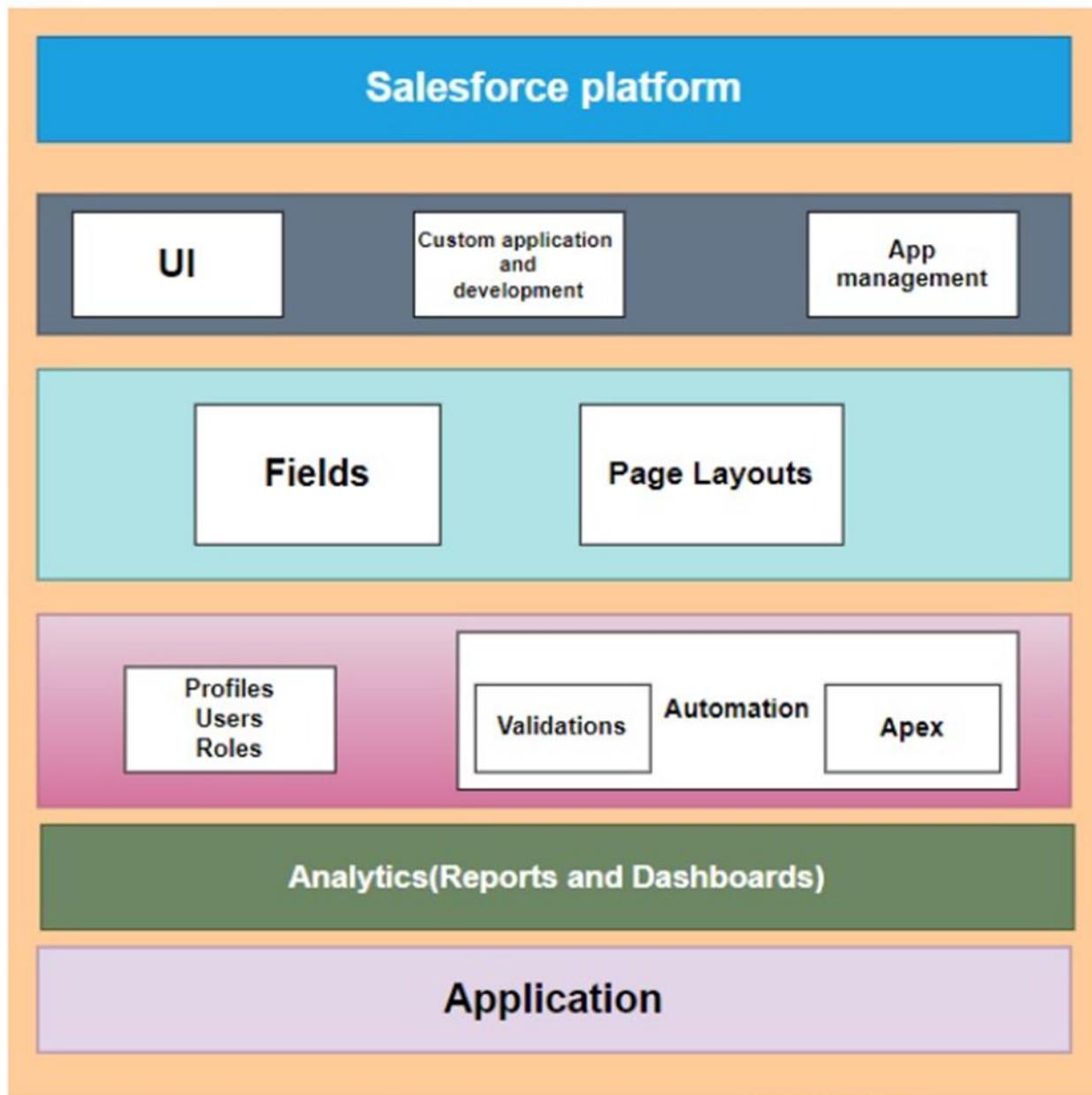
1.7 Project Road Map

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.



1.7.2 Technical Architecture



PREPARATION DATA MODELING

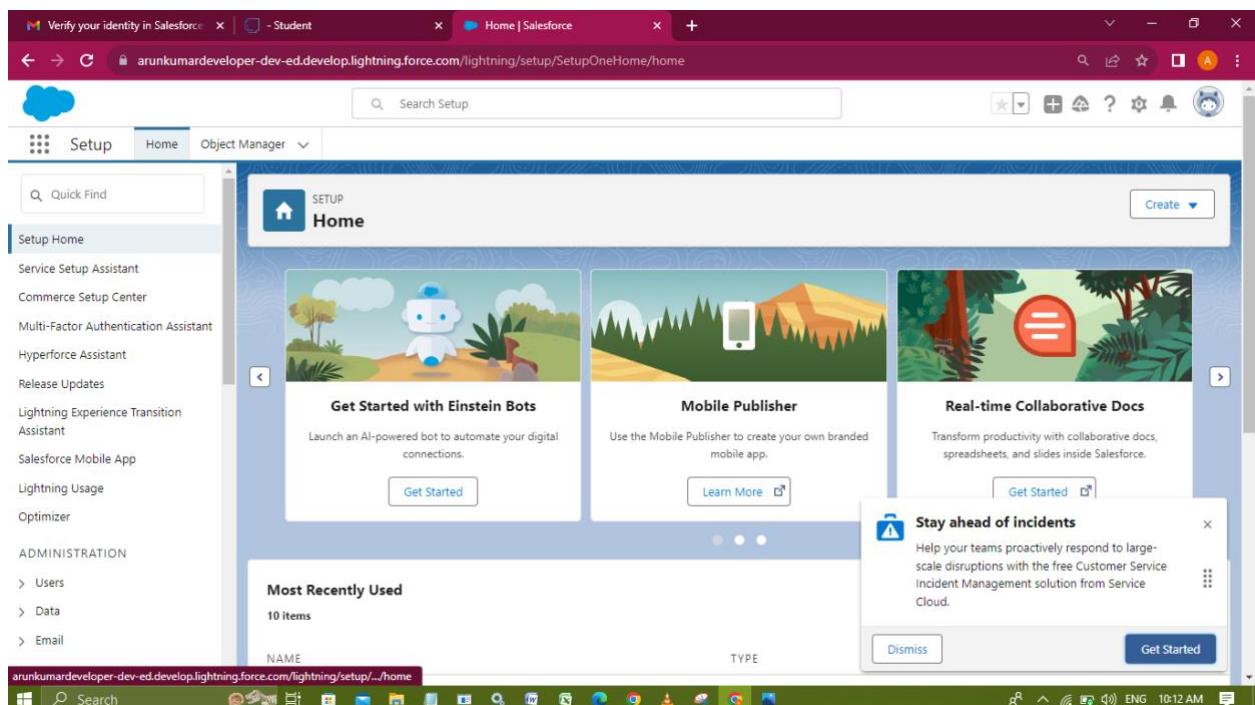
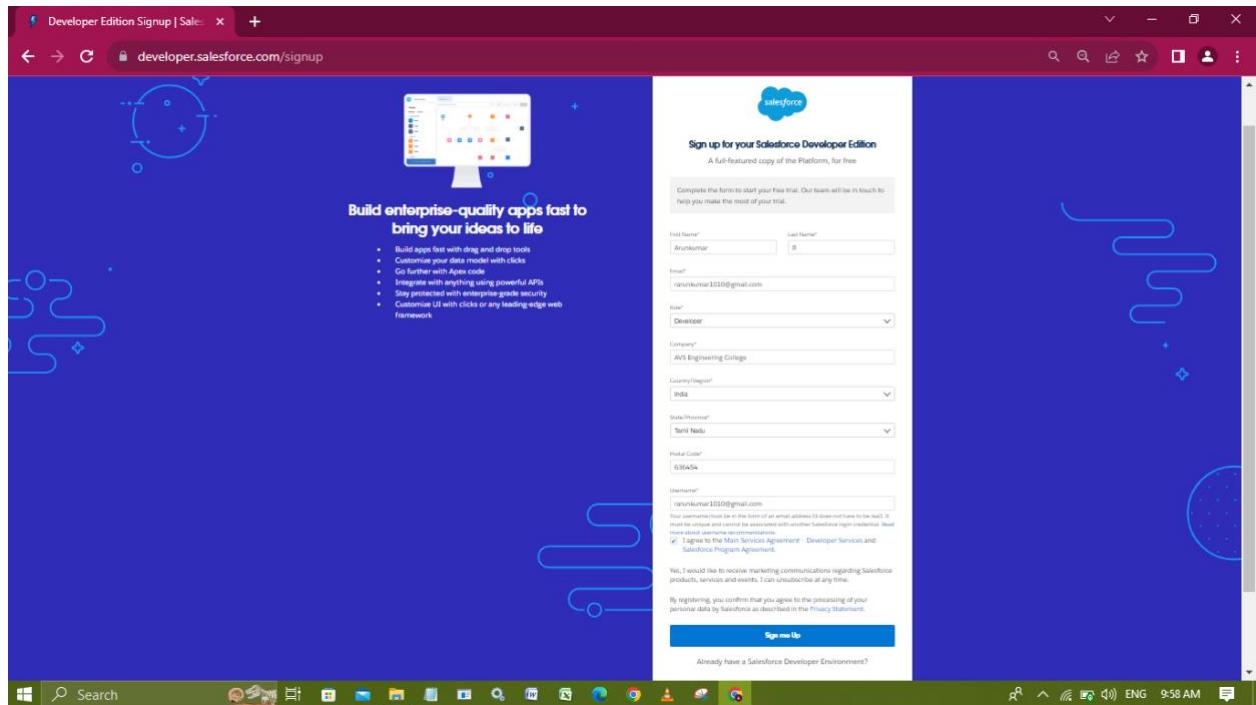
2.1 Salesforce Developer Org

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 are tabs for Products, Industries, Customers, Learning, Support, Company, and Salesforce+. A search bar for 'Search Developers' and a 'Login' button are also at the top. Below the header, there's a navigation bar with links for Developers, Home, Documentation, APIs, Discover, Build, and Connect. A prominent feature is a large circular graphic with a blue gradient background, featuring a white line-art illustration of a bear standing in a forest. The text 'Get release-ready today!' is overlaid on the circle. To the left of the circle, there's a call-to-action button labeled 'Read it now'. Below the circle, there's a section titled 'Latest Developer News' with a blurred background image of a computer screen displaying developer tools. The news section includes a search bar and system status indicators like weather and time.

The screenshot shows the Salesforce Lightning Platform landing page. On the left, there's a large image of a computer monitor displaying the Salesforce developer interface with various components like Lightning Components and Lightning Pages. To the right, there's a promotional section for the Developer Edition. It features the Salesforce lightning platform logo and the text 'Get your very own Developer Edition' followed by 'A full-featured copy of Lightning Platform, for FREE.' Below this, there's a form with fields for Name (First and Last), Email, Role, Company, and Country. At the bottom, there's a section titled 'Account Activation'.

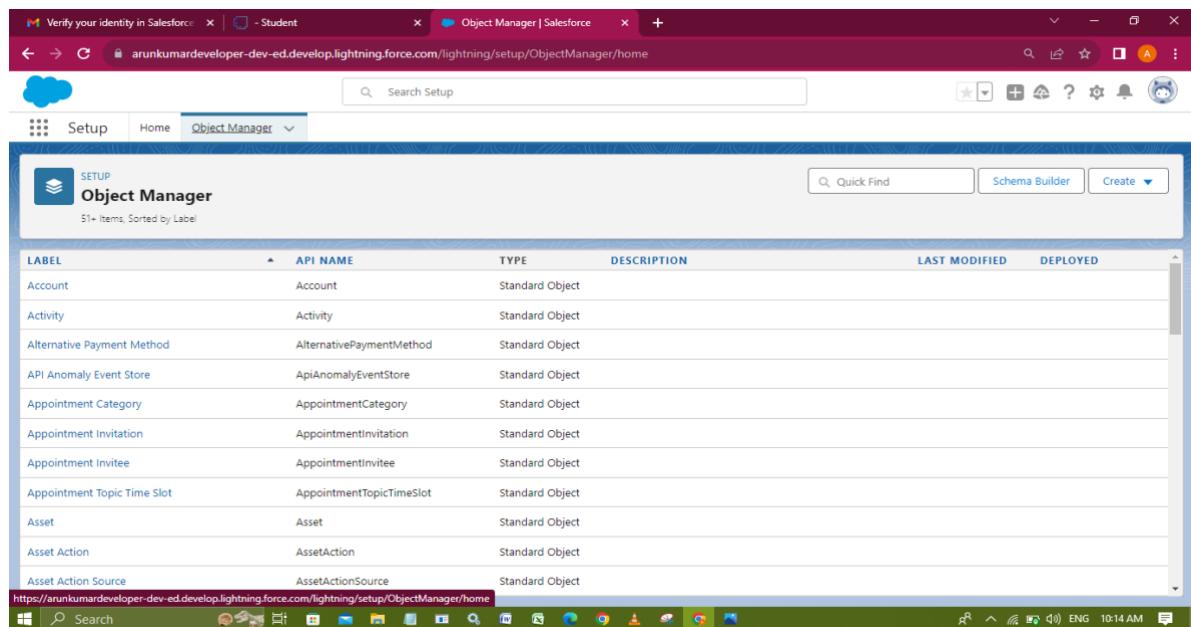
Activation tracks information about devices from which users have verified their identity.



2.2 Object Creation

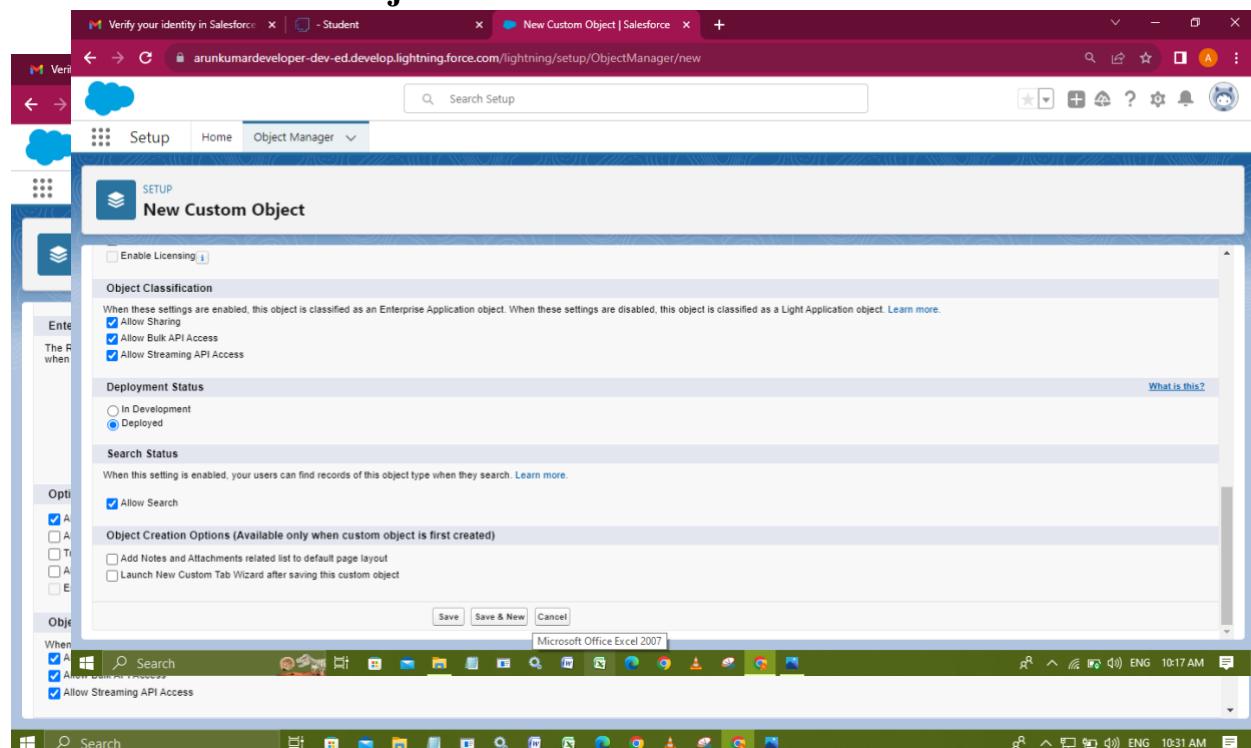
Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc. Custom objects: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

Create the Consultants Object



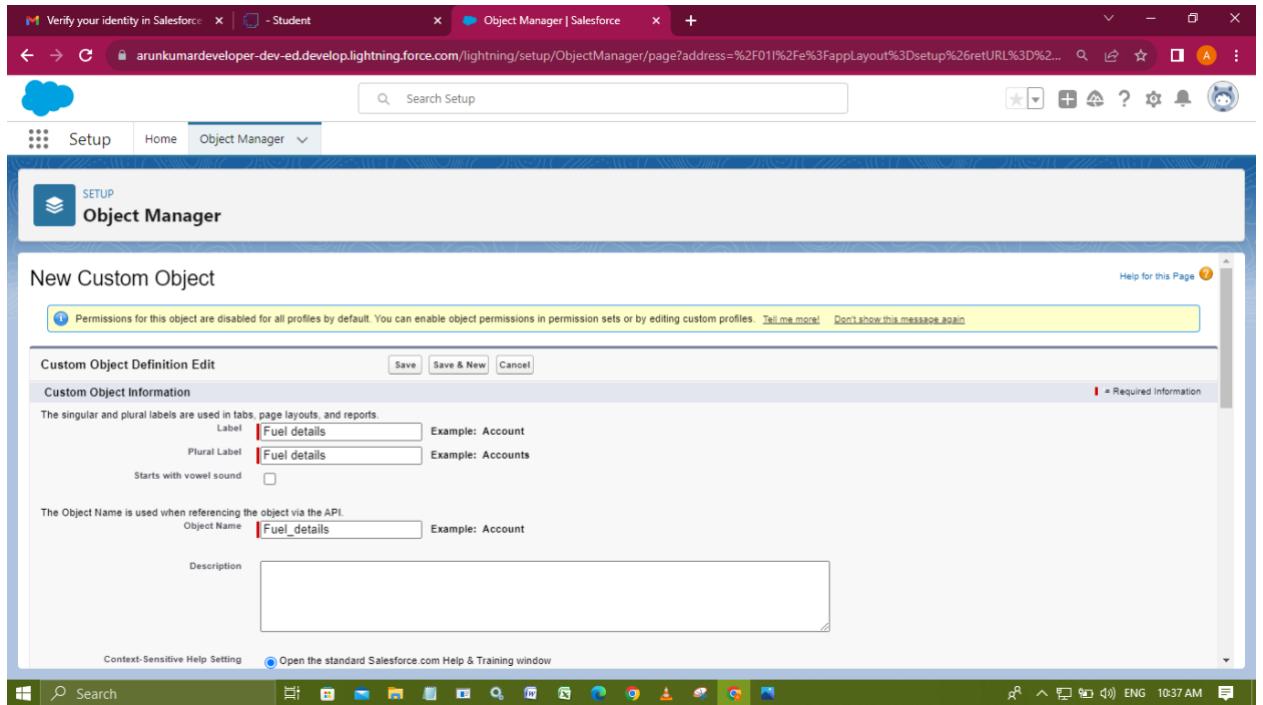
The screenshot shows the Salesforce Object Manager page. At the top, there are tabs for 'Setup' and 'Object Manager'. Below the tabs, the title 'Object Manager' is displayed with the subtitle '51+ Items, Sorted by Label'. There is a search bar labeled 'Search Setup' and buttons for 'Quick Find', 'Schema Builder', and 'Create'. A table lists various standard objects with columns for 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. Some examples listed include Account, Activity, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Asset, Asset Action, and Asset Action Source. The URL in the browser is https://arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home.

Create the Retailers Object



The screenshot shows the 'New Custom Object' creation page in the Salesforce setup. The title is 'New Custom Object'. It includes sections for 'Enable Licensing', 'Object Classification' (with checkboxes for Allow Sharing, Allow Bulk API Access, and Allow Streaming API Access), 'Deployment Status' (set to 'Deployed'), 'Search Status' (set to 'Allow Search'), and 'Object Creation Options' (checkboxes for 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object'). At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons. The URL in the browser is https://arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new.

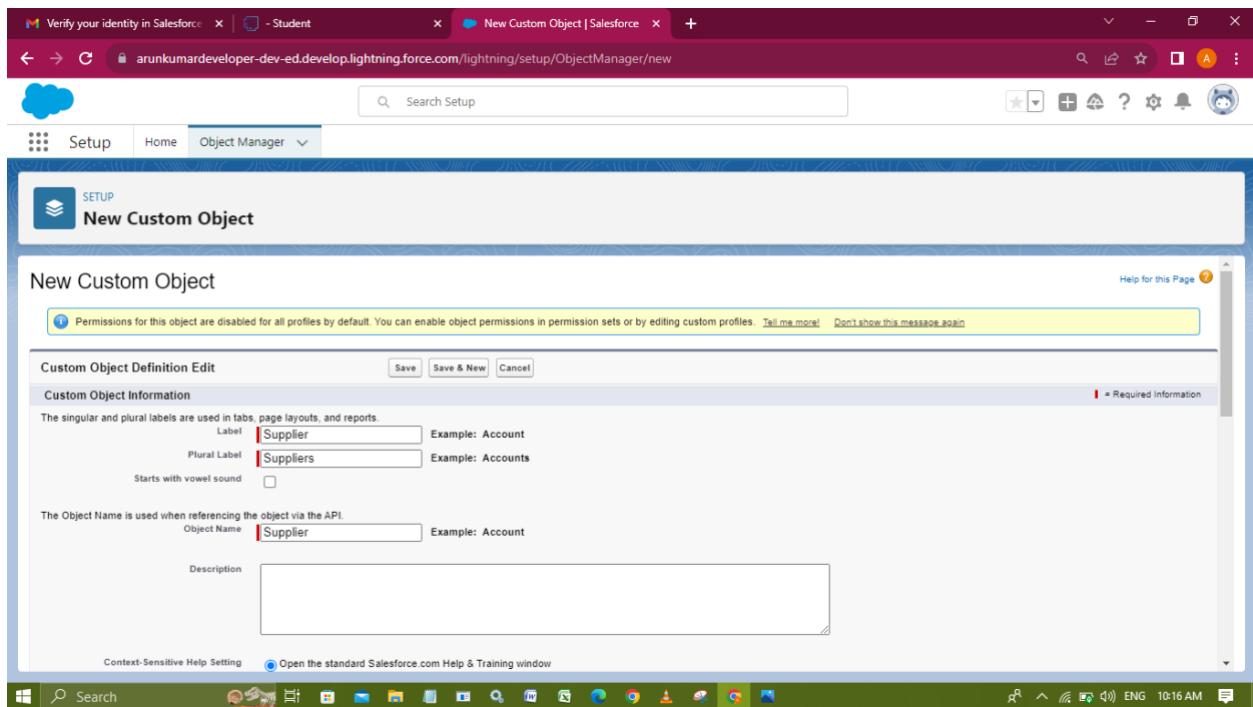
Create the Others Object



2.3 Fields and Relationship

An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

Fields in Our_ Customers Objects



Fields in Consultants Objects

Gas station :

The primary goal of this project is to implement a CRM application tailored to the specific requirements of our gas station operations. This system aims to optimize fuel sales, enhance customer service, improve inventory management, and drive operational efficiency.

Salesforce Setup - Gas Station | Salesforce

Verify your identity in Salesforce - Student | Recently Viewed | Suppliers | Sales | Gas Station | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002bz20/FieldsAndRelationships/new?0.source=alohaHeader

Setup Home Object Manager

Gas Station

SETUP > OBJECT MANAGER

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.

Help for this Page ?

Next Cancel Step 1

Salesforce Setup - Gas Station | Salesforce

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arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002bz20/FieldsAndRelationships/new?0.source=alohaHeader

Setup Home Object Manager

Gas Station

SETUP > OBJECT MANAGER

New Custom Field

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Setup Home Object Manager

Gas Station

SETUP > OBJECT MANAGER

New Custom Field

Step 2. Enter the details Step 2 of 5

Field Label: Fuel Supplied to bunk

Field Name: Fuel_Supplied_to_bunk

Description:

Help Text:

Auto add to custom report type: Add this field to existing custom report types that contain this entity

Previous Next Cancel

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Setup Home Object Manager

Gas Station

SETUP > OBJECT MANAGER

New Custom Field

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize

Master Object	Gas Station
Summarized Object	Fuel details

Required Information

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate: Fuel Supplied

Filter Criteria

All records should be included in the calculation
 Only records meeting certain criteria should be included in the calculation

Previous Next Cancel

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Setup Home Object Manager

Gas Station

SETUP > OBJECT MANAGER

Gas Station New Custom Field

Step 4. Establish field-level security Step 4 of 5

Field Label: Fuel Supplied to bunk
Data Type: Roll-Up Summary
Field Name: Fuel_Supplied_to_bunk
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	✓
Analytics Cloud Security User	<input checked="" type="checkbox"/>	✓
Contract Manager	<input checked="" type="checkbox"/>	✓
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	✓
Custom: Marketing Profile	<input checked="" type="checkbox"/>	✓
Custom: Sales Profile	<input checked="" type="checkbox"/>	✓

Help for this Page

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Setup Home Object Manager

Gas Station

SETUP > OBJECT MANAGER

Gas Station New Custom Field

Step 5. Add to page layouts Step 5 of 5

Field Label: Fuel Supplied to bunk
Data Type: Roll-Up Summary
Field Name: Fuel_Supplied_to_bunk
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 Gas Station Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

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Recently Viewed | Suppliers | Sales | Buyer | Salesforce

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Setup Home Object Manager

SETUP > OBJECT MANAGER Buyer

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

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.

External Lookup Relationship

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 Date/Time field.

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.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

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Recently Viewed | Suppliers | Sales | Buyer | Salesforce

Verify your identity in Salesforce - Student

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Setup Home Object Manager

SETUP > OBJECT MANAGER Buyer

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

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: Fuel filled in vehicle

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length: 6

Number of digits to the left of the decimal point

Field Name: Fuel_filled_in_vehicle

Decimal Places: 0

Number of digits to the right of the decimal point

Description:

Help Text:

Required: Always require a value in this field in order to save a record

Unique: Do not allow duplicate values

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arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0115j000002bz2P/FieldsAndRelationships/new?0.source=alohaHeader

Setup Home Object Manager

SETUP > OBJECT MANAGER Buyer

New Custom Field Step 2 of 4

Field Label: Fuel filled in vehicle

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length: 5

Decimal Places: 0

Field Name: Fuel_filled_in_vehicle

Description:

Help Text:

Required: Always require a value in this field in order to save a record

Unique: Do not allow duplicate values

Previous Next Cancel

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Setup Home Object Manager

SETUP > OBJECT MANAGER Buyer

New Custom Field Step 4 of 4

Field Label: Fuel filled in vehicle

Data Type: Number

Field Name: Fuel_filled_in_vehicle

Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name

Buyer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

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Setup Home Object Manager

Gas Station

SETUP > OBJECT MANAGER

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

Data Type

None Selected Select one of the data types below.

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Help for this Page

Next Cancel

Step 1

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Setup Home Object Manager

Gas Station

SETUP > OBJECT MANAGER

New Custom Field

Step 2. Enter the details

Field Label: Fuel used

Field Name: Fuel_used

Description:

Help Text:

Auto add to custom report type Add this field to existing custom report types that contain this entity

Previous Next Cancel

Step 2 of 5

Salesforce Setup - Gas Station | Salesforce

Verify your identity in Salesforce - Student | Recently Viewed | Suppliers | Sales | Gas Station | Salesforce

arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0115j000002bz20/FieldsAndRelationships/new?0.source=alohaHeader

Setup Home Object Manager

Gas Station

SETUP > OBJECT MANAGER

New Custom Field

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize

Master Object	Gas Station
Summarized Object	Buyer

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate: Fuel filled in vehicle

Filter Criteria

All records should be included in the calculation
 Only records meeting certain criteria should be included in the calculation

Help for this Page

Previous Next Cancel

Salesforce Setup - Gas Station | Salesforce

Verify your identity in Salesforce - Student | Recently Viewed | Suppliers | Sales | Gas Station | Salesforce

arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0115j000002bz20/FieldsAndRelationships/new?0.source=alohaHeader

Setup Home Object Manager

Gas Station

SETUP > OBJECT MANAGER

New Custom Field

Step 5. Add to page layouts Step 5 of 5

Field Label: Fuel used
Data Type: Roll-Up Summary
Field Name: Fuel_used
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 Gas Station Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Salesforce Setup - Gas Station | Salesforce

Verify your identity in Salesforce - Student Recently Viewed | Suppliers | Sales Gas Station | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002bz20/FieldsAndRelationships/new?0.source=alohaHeader

Setup Home Object Manager

Gas Station

SETUP > OBJECT MANAGER

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.

Help for this Page

Next Cancel

Salesforce Setup - Gas Station | Salesforce

Verify your identity in Salesforce - Student Recently Viewed | Suppliers | Sales Gas Station | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002bz20/FieldsAndRelationships/new?0.source=alohaHeader

Setup Home Object Manager

Gas Station

SETUP > OBJECT MANAGER

New Custom Field

Step 2. Choose output type

Field Label Fuel Available in bunk

Field Name Fuel_Available_in_bunk

Auto add to custom report type Add this field to existing custom report types that contain this entity

Formula Return Type

None Selected Select one of the data types below.

Checkbox Calculate a boolean value
Example: `(TODAY() > CloseDate)`

Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost__c`

Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date + CloseDate - 7`

Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `(Next = NOW()) + 1`

Number Calculate a numeric value.

Help for this Page

Previous Next Cancel

Salesforce Setup - Gas Station | Salesforce

Verify your identity in Salesforce - Student | Recently Viewed | Suppliers | Gas Station | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002bz20/FieldsAndRelationships/new?0.source=alohaHeader

Setup Home Object Manager

Gas Station

Gas Station New Custom Field Step 3 of 5

Help for this Page

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

Step 3. Enter formula

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Fahrenheit = 1.8 * Celsius_c + 32 | More Examples

Simple Formula Advanced Formula

Insert Field Insert Operator

Fuel Available in bunk (Number) =

Fuel_supplied_to_bunk_c - Fuel_Used_c

Functions

-- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

Salesforce Setup - Gas Station | Salesforce

Verify your identity in Salesforce - Student | Recently Viewed | Suppliers | Gas Station | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002bz20/FieldsAndRelationships/new?0.source=alohaHeader

Setup Home Object Manager

Gas Station

Gas Station New Custom Field Step 3 of 5

Help for this Page

Fields & Relationships

Page Layouts
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List View Button Layout

Step 3. Enter formula

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Fahrenheit = 1.8 * Celsius_c + 32 | More Examples

Simple Formula Advanced Formula

Insert Field Insert Operator

Fuel Available in bunk (Number) =

Fuel_supplied_to_bunk_c - Fuel_Used_c

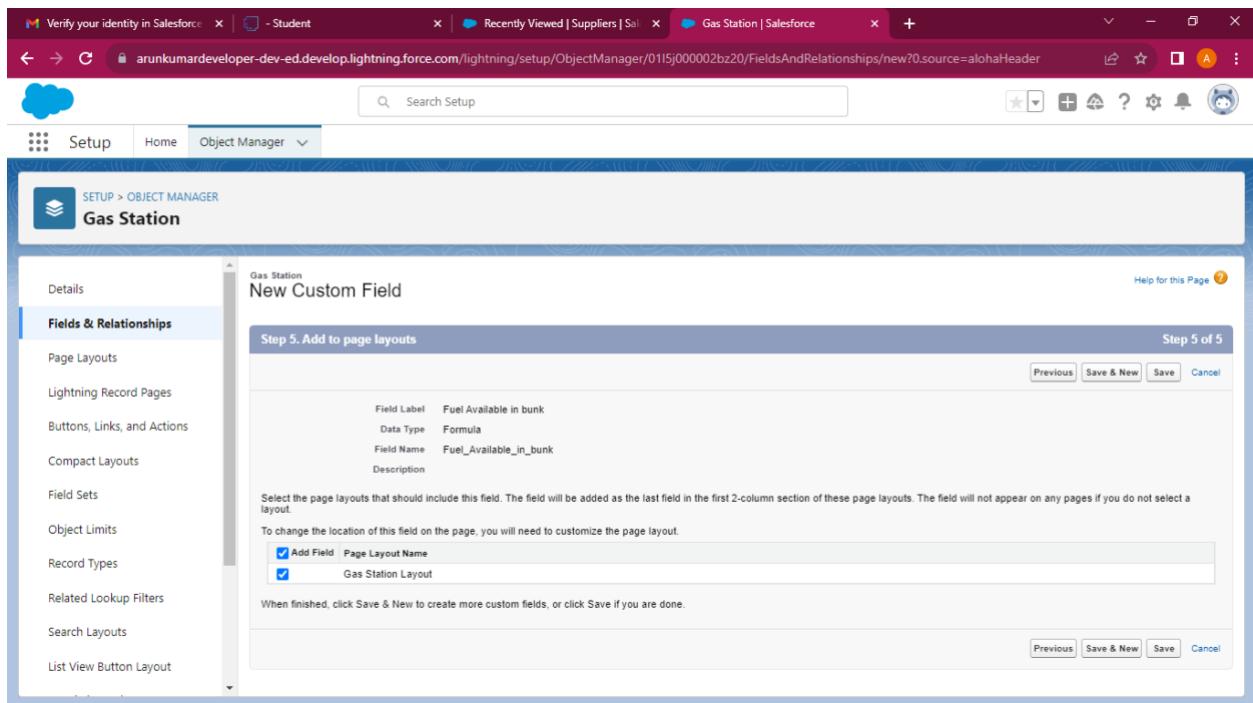
Functions

-- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

Check Syntax No syntax errors in merge fields or functions. (Compiled size: 65 characters)



Buyer

- Prospecting: Identifying potential buyers in a specific geographic area.
- Cold calling or warm calling: Reaching out to prospects via phone or in-person meetings to introduce products or services.
- Sales presentations: Delivering tailored presentations to showcase the benefits of the company's offerings.
- Building rapport: Developing trust and rapport with the buyers to understand their needs and preferences.
- Negotiation: Discussing terms, pricing, and agreements with potential buyers.
- Providing ongoing support: Ensuring customer satisfaction and addressing any issues or concerns after the sale.

Salesforce Setup - Object Manager - Buyer

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.

Help for this Page

Next Cancel

Salesforce Setup - Object Manager - Buyer

Step 2. Choose output type

Field Label Field Name

Auto add to custom report type Add this field to existing custom report types that contain this entity

Formula Return Type

- None Selected Select one of the data types below.
- Checkbox Calculate a boolean value.
Example: `(TODAY() > CloseDate)`
- Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `(Gross Margin = Amount - Cost__c)`
- Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `(Reminder Date = CloseDate - 7)`
- Date/Time Calculate a datetime, for example, by adding a number of hours or days to another datetime.
Example: `(Next = NOW() + 1)`
- Number Calculate a numeric value.
Example: `(Fahrenheit = 1.8 * Celsius__c + 32)`
- Percent Calculate a percent and automatically add the percent sign to the number.
Example: `(Discount = (Amount - Discounted_Amount__c) / Amount)`
- Text Create a text string, for example, by concatenating other text fields.

Step 2 of 5

Previous Next Cancel

Salesforce Setup - arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015j000002bz2P/FieldsAndRelationships/new?0.source=alohaHeader

New Custom Field

Step 3. Enter formula

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Full Name = LastName & " " & FirstName [More Examples...](#)

Simple Formula Advanced Formula

Customer Name (Text) =
First_Name__c + ' ' + Last_Name__c

Functions

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Quick Tips

- Getting Started
- Operators & Functions

Help for this Page

Salesforce Setup - arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015j000002bz2P/FieldsAndRelationships/new?0.source=alohaHeader

New Custom Field

Step 2. Enter the details

Field Label: First Name

Please enter the maximum length for a text field below.
Length: First Name

Field Name: First_Name

Description:

Help Text:

Required: Always require a value in this field in order to save a record

Unique: Do not allow duplicate values

Treat "ABC" and "abc" as duplicate values (case insensitive)

Treat "ABC" and "abc" as different values (case sensitive)

External ID: Set this field as the unique record identifier from an external system

Help for this Page

Salesforce Setup - arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0115j000002bz2P/FieldsAndRelationships/new

Verify your identity in Salesforce - Student - Recently Viewed | Buyer | Sales - Buyer | Salesforce - Buyer | Salesforce

Cloud icon, Search Setup, Home, Object Manager

SETUP > OBJECT MANAGER
Buyer

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

New Custom Field
Step 2. Enter the details
Step 2 of 4
Field Label: First Name
Length: 100
Field Name: First_Name
Description:
Help Text:
Required: Always require a value in this field in order to save a record
Unique: Do not allow duplicate values
 Treat "ABC" and "abc" as duplicate values (case insensitive)
 Treat "ABC" and "abc" as different values (case sensitive)
External ID: Set this field as the unique record identifier from an external system

Salesforce Setup - arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0115j000002bz2P/FieldsAndRelationships/new

Verify your identity in Salesforce - Student - Recently Viewed | Buyer | Sales - Buyer | Salesforce - Buyer | Salesforce

Cloud icon, Search Setup, Home, Object Manager

SETUP > OBJECT MANAGER
Buyer

Details
Fields & Relationships
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Search Layouts
List View Button Layout

New Custom Field
Step 4. Add to page layouts
Step 4 of 4
Field Label: First Name
Data Type: Text
Field Name: First_Name
Description:
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
 Add Field
Page Layout Name: Buyer Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.

Salesforce Setup - arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002bz2P/FieldsAndRelationships/new

Verify your identity in Salesforce - Student - Recently Viewed | Buyer | Sales - Buyer | Salesforce - Buyer | Salesforce

Cloud icon, Search Setup, Home, Object Manager

Buyer

New Custom Field

Step 4 of 4

Field Label: Last Name
Data Type: Text
Field Name: Last_Name
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 Buyer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous, Save & New, Save, Cancel

Salesforce Setup - arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002bz2P/FieldsAndRelationships/new?source=alohaHeader

Verify your identity in Salesforce - Student - Recently Viewed | Buyer | Sales - Buyer | Salesforce - Buyer | Salesforce

Cloud icon, Search Setup, Home, Object Manager

Buyer

New Custom Field

Step 4 of 4

Field Label: Last Name
Data Type: Text
Field Name: Last_Name
Description:

Check Syntax: No syntax errors in merge fields or functions. (Compiled size: 35 characters)

Help Text:

Blank Field Handling

If your formula references any number, currency, or percent fields, specify what happens to the formula output when their values are blank.

Treat blank fields as zeroes
 Treat blank fields as blanks

The screenshot shows the Salesforce Object Manager interface for creating a new field. The left sidebar under 'Fields & Relationships' includes options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main area displays a formula field named 'Customer Name (Text)'. The formula is constructed as 'First Name + ' ' + Last Name'. A sidebar titled 'Functions' lists various mathematical and string manipulation functions such as ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. A message at the bottom indicates 'No syntax errors in merge fields or functions. (Compiled size: 35 characters)'.

The screenshot shows the 'New Custom Field' configuration page, specifically Step 5: Add to page layouts. The field 'Customer Name' has been added to the 'Buyer Layout'. The configuration screen includes fields for Field Label, Data Type, Field Name, and Description. It also provides instructions for selecting page layouts and changing field location. At the bottom, there are buttons for Previous, Save & New, Save, and Cancel.

Salesforce Setup - arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015j000002bz2P/FieldsAndRelationships/new?0.source=alohaHeader

Verify your identity in Salesforce - Student - Recently Viewed | Buyer | Sales - Buyer | Salesforce - Buyer | Salesforce

Cloud icon, Search Setup, Home, Object Manager

Buyer

New Custom Field

Step 2. Choose output type Step 2 of 5

Field Label: Amount Paid, Field Name: Amount_Paid

Auto add to custom report type: Add this field to existing custom report types that contain this entity

Formula Return Type:

- None Selected
- Checkbox: Calculate a boolean value. Example: TODAY() > CloseDate
- Currency: Calculate a dollar or other currency amount and automatically format the field as a currency amount. Example: Gross Margin = Amount - Cost__c
- Date: Calculate a date, for example, by adding or subtracting days to other dates. Example: Reminder Date = CloseDate - 7
- Date/Time: Calculate a datetime, for example, by adding a number of hours or days to another datetime. Example: (Next = NOW()) + 1
- Number: Calculate a numeric value. Example: Fahrenheit = 1.8 * Celsius_c + 32

Help for this Page

Salesforce Setup - arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015j000002bz2P/FieldsAndRelationships/new?0.source=alohaHeader

Verify your identity in Salesforce - Student - Recently Viewed | Buyer | Sales - Buyer | Salesforce - Buyer | Salesforce

Cloud icon, Search Setup, Home, Object Manager

Buyer

Formula Editor

Amount Paid (Number) =

Fuel_filled_in_vehicle__c * Gas_Station_name__c.Fuel_price_liter__c

Insert Field, Insert Operator, Functions

Functions: ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN

Check Syntax: No syntax errors in merge fields or functions. (Compiled size: 67 characters)

Speakers: 69%

Salesforce Setup - arunkumardeveloper-dev-ed.lightning.force.com

Verify your identity in Salesforce - Student - Recently Viewed | Buyer | Sales - Buyer | Salesforce - Buyer | Salesforce

Object Manager > Buyer

Search Setup

Setup Home Object Manager

Buyer

SETUP > OBJECT MANAGER

Amount Paid (Number) =

Fuel_filled_in_vehicle * Gas_Station_name * Fuel_price_liter

Insert Field Insert Operator Functions

ABS ACOS ADDMONTHS AND ASCII ASIN

Check Syntax No syntax errors in merge fields or functions. (Compiled size: 67 characters)

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

Salesforce Setup - arunkumardeveloper-dev-ed.lightning.force.com

Verify your identity in Salesforce - Student - Recently Viewed | Buyer | Sales - Buyer | Salesforce - Buyer | Salesforce

Object Manager > Buyer

Search Setup

Setup Home Object Manager

Buyer

SETUP > OBJECT MANAGER

New Custom Field Step 5. Add to page layouts Step 5 of 5

Field Label Amount Paid Data Type Formula Field Name Amount_Paid Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name Buyer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

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

Salesforce Setup - arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0115j000002bz2P/FieldsAndRelationships/new

Setup Home Object Manager Buyer

SETUP > OBJECT MANAGER Buyer

Fields & Relationships

- Details
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout

Entered into the Date/Time field.

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.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, '2:40 PM', '14:40', '14:40:00', and '14:40:50.000' are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

Salesforce Setup - arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0115j000002bz2P/FieldsAndRelationships/new

Setup Home Object Manager Buyer

SETUP > OBJECT MANAGER Buyer

Fields & Relationships

- Details
- Page Layouts
- Lightning Record Pages
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- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout

New Custom Field Step 2 of 4

Help for this Page ?

Step 2. Enter the details

Field Label [i](#)

Values Use global picklist value set
 Enter values, with each value separated by a new line

Display values alphabetically, not in the order entered
 Use first value as default value [i](#)
 Restrict picklist to the values defined in the value set [i](#)

Field Name [i](#)

Salesforce Setup - arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0115j000002bz2P/FieldsAndRelationships/new

Verify your identity in Salesforce - Student - Recently Viewed | Buyer | Sales - Buyer | Salesforce - Buyer | Salesforce

Cloud icon, Search Setup, Home, Object Manager, Help for this Page

Buyer - SETUP > OBJECT MANAGER

Details, Fields & Relationships (selected), 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.

New Custom Field - Step 4 of 4

Field Label: Vehicle type, Data Type: Picklist, Field Name: Vehicle_type, Description: Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout. To change the location of this field on the page, you will need to customize the page layout.

Add Field: Page Layout Name (checkbox checked), Buyer Layout (checkbox checked).

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous, Save & New, Save, Cancel

Salesforce Setup - arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0115j000002bz2P/FieldsAndRelationships/new

Verify your identity in Salesforce - Student - Recently Viewed | Buyer | Sales - Buyer | Salesforce - Buyer | Salesforce

Cloud icon, Search Setup, Home, Object Manager, Help for this Page

Buyer - SETUP > OBJECT MANAGER

Details, Fields & Relationships (selected), 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.

New Custom Field - Step 2 of 4

Field Label: Mode of payment, Values: Use global picklist value set (radio button), Enter values, with each value separated by a new line (radio button selected). Values entered: credit card, debit card, net banking, upi, cash.

Display values alphabetically, not in the order entered (checkbox), Use first value as default value (checkbox), Restrict picklist to the values defined in the value set (checkbox checked).

Field Name: Mode_of_payment, Description:

Previous, Next, Cancel

Salesforce Setup - Validation Rules

Validation Rules

No items to display.

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

Salesforce Setup - New Custom Field

Step 2. Enter the details

Field Label: Phone Number

Field Name: Phone_Number

Description:

Help Text:

Required: Always require a value in this field in order to save a record

Auto add to custom report type: Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Use formula editor. Enclose text and picklist value API names in double quotes ("the_name"), include numbers without quotes (123), show percentage as decimals (.01), and express date calculations in the standard format: (Today+7). To reference a field from a Custom Metadata type record use: \$CustomMetadataType__mdt RecordAPIName Field__c

Salesforce Setup - Validation Rule Edit

Validation Rule Edit

Rule Name: Phone

Active:

Description:

Error Condition Formula

Example: Discount_Percent_c>0.30 [More Examples](#)

Display an error if Discount is more than 30%

If this formula expression is true, display the text defined in the Error Message area

NOT(REGEX(Phone_Number__c, "[6-9]{1}[0-9]{9}"))

Functions

- All Function Categories --
- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign
[Help on this function](#)

Check Syntax No errors found

Validation Rules

Salesforce Setup - Validation Rule Edit

Validation Rule Edit

Rule Name: Phone

Active:

Description:

Error Condition Formula

Example: Discount_Percent_c>0.30 [More Examples](#)

Display an error if Discount is more than 30%

If this formula expression is true, display the text defined in the Error Message area

NOT(REGEX(Phone_Number__c, "[6-9]{1}[0-9]{9}"))

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message: Incorrect data

This error message can either appear at the top of the page or below a specific field on the page

Error Location: Top of Page Field Phone Number

Save Save & New Cancel

Validation Rules

Salesforce Setup - Object Manager

Verify your identity in Salesforce - Student - Recently Viewed | Buyer | Sales - Gas Station | Salesforce - Object Manager | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F03d5j000000lCke

Search Setup

SETUP Object Manager

Buyer Validation Rule

Back to Buyer

Help for this Page

Validation Rule Detail

Rule Name	Phone	Active	✓
Error Condition Formula	NOT(REGEX(Phone_Number__c, "[6-9][1][0-9]{9}"))	Error Location	Phone Number
Error Message	incorrect data		
Description			
Created By	Arunkumar R, 17/10/2023, 2:57 pm	Modified By	Arunkumar R, 17/10/2023, 2:57 pm

Edit Clone

Salesforce Setup - Object Manager

Verify your identity in Salesforce - Student - Recently Viewed | Buyer | Sales - Buyer | Salesforce - Object Manager | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002bz2P/FieldsAndRelationships/new

Search Setup

SETUP > OBJECT MANAGER Buyer

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Fields & Relationships

- Details
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- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout

Buyer

Field Label: email

Field Name: email

Description:

Help Text:

Required: Always require a value in this field in order to save a record

Unique: Do not allow duplicate values

External ID: Set this field as the unique record identifier from an external system

Auto add to custom report type: Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Salesforce Setup - arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015j000002bz2P/PageLayouts/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Buyer

Page Layouts

1 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Buyer Layout	Arunkumar R, 17/10/2023, 10:35 am	Arunkumar R, 17/10/2023, 3:02 pm

Quick Find New Page Layout Assignment

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

Salesforce Setup - arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015j000002bz2P/PageLayouts/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Buyer

Create New Page Layout

Help for this Page

As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names are translated for your international users.

Existing Page Layout: Buyer Layout

Page Layout Name: customer layout

Save Cancel

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

Salesforce Setup - Object Manager

Buyer Page Layout

Fields:

Section	Created By	Fuel filled in ve...
Section	Customer Name	Gas Station name
Blank Space	email	Phone Number
Amount Paid	Last Modified By	Vehicle type
Buyer	First Name	Last Name

Buyer Detail

Standard Buttons: Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Custom Buttons

Vehicle Info

Information (Header visible on edit only): Buyer GEN-2004-001234

Receipt Details

Mode of payment: Sample Text
Amount Paid: 951.38

Vehicle Info

Fuel filled in vehicle: 17.231
Vehicle type: Sample Text

Salesforce Setup - Object Manager

Buyer Page Layout

Fields:

Section	Created By	Fuel filled in ve...
Section	Customer Name	Gas Station name
Blank Space	email	Phone Number
Amount Paid	Last Modified By	Vehicle type
Buyer	First Name	Last Name

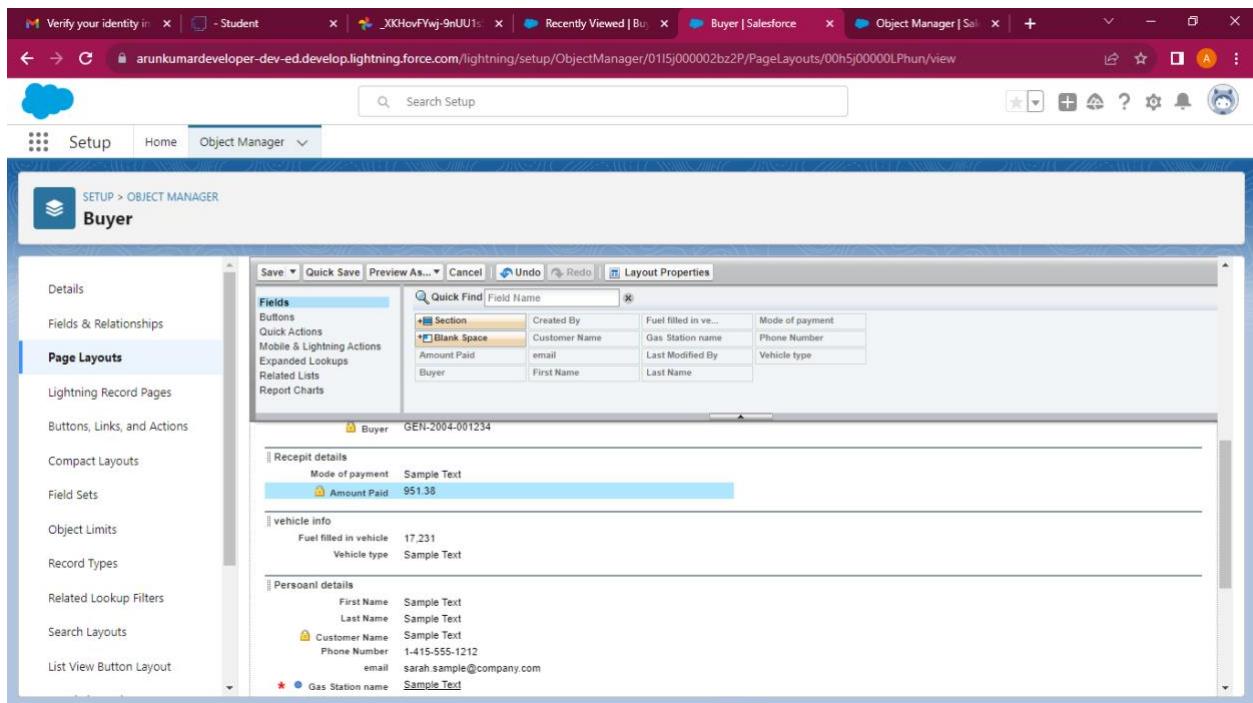
Persoani details

First Name: Sample Text
Last Name: Sample Text
Customer Name: Sample Text
Phone Number: 1-415-555-1212
email: sarah.sample@company.com
Gas Station name: Sample Text

System Information (Header visible on edit only): Created By: Sample Text, Last Modified By: Sample Text

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only)



Fuel Details

"Fuel details" can refer to information about various aspects of fuel, such as its type, composition, sources, usage, and related data. Here are some common aspects of fuel details:

- Fuel Types: There are different types of fuel, including gasoline, diesel, natural gas, propane, electricity, hydrogen, and more. Each type has its unique properties and uses.
- Composition: Fuels are composed of various chemical compounds. For example, gasoline primarily consists of hydrocarbons, while diesel fuel contains a mixture of hydrocarbons with a higher boiling point.

- Sources: Fuels can be derived from various sources. Gasoline and diesel are typically produced from crude oil, while natural gas is, well, a gas found underground. Renewable fuels, such as biofuels, are made from organic materials like corn, sugarcane, or algae.
- Energy Content: Different fuels have varying energy content, which is usually measured in units like British Thermal Units (BTUs) or joules. This energy content affects the fuel's efficiency for various applications.
- Usage: Fuels are used for a wide range of applications, including powering vehicles (cars, trucks, airplanes), generating electricity, heating buildings, and running industrial machinery.
- Environmental Impact: Each fuel has its environmental impact. For instance, fossil fuels like gasoline and diesel release carbon emissions when burned, contributing to global warming. Renewable fuels are generally considered more environmentally friendly.
- Prices and Availability: Fuel prices can vary widely depending on factors like location, global oil markets, and geopolitical events. Availability of specific fuels can also vary by region.
- Regulations: Many countries have regulations regarding fuel quality, emissions, and fuel efficiency standards. These regulations impact the formulation and sale of fuels.
- Alternative Fuels: With concerns about climate change and sustainability, there's increasing interest in alternative fuels like electric power, hydrogen, and biofuels. These fuels offer potential environmental benefits and reduced reliance on fossil fuels.

- Storage and Handling: Different fuels require specific storage and handling procedures to ensure safety and prevent environmental damage.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Fuel details	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Step 1. Choose the field type

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

Data Type

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.

Salesforce Setup - Fuel details

SETUP > OBJECT MANAGER

Fuel details

New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To: Supplier

Help for this Page

Previous Next Cancel

Salesforce Setup - Fuel details

SETUP > OBJECT MANAGER

Fuel details

New Relationship

Step 3. Enter the label and name for the lookup field

Field Label: Supplier Name

Field Name: Supplier_Name

Description:

Help Text:

Child Relationship Name: Fuel_details

Sharing Setting:

- Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
- Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Help for this Page

Previous Next Cancel

Fuel details | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015j000002bzU/FieldsAndRelationships/new

Setup Home Object Manager

Fuel details

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

New Relationship

Step 6. Add custom related lists Step 6 of 6

Field Label Supplier Name Data Type Master-Detail Field Name Supplier_Name Description

Specify the title that the related list will have in all of the layouts associated with the parent. Related List Label Fuel details

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List Page Layout Name Supplier Layout Append related list to users' existing personal customizations

Previous Save & New Save Cancel

Fuel details | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015j000002bzU/FieldsAndRelationships/new

Setup Home Object Manager

Fuel details

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

New Relationship

Step 2. Choose the related object Step 2 of 6

Select the other object to which this object is related.

Related To Gas Station

Previous Next Cancel

The image consists of two vertically stacked screenshots of the Salesforce Setup interface, specifically the Object Manager section for the 'Fuel details' object.

Screenshot 1: Step 3. Enter the label and name for the lookup field

- Left Sidebar:** Shows the 'Fields & Relationships' section under 'Fuel details'.
- Right Panel:** Titled 'New Relationship'. It shows fields for 'Field Label' (Gas Station), 'Field Name' (Gas_Station), 'Description' (empty), 'Help Text' (empty), and 'Child Relationship Name' (Fuel_details). A 'Sharing Setting' section indicates 'Read/Write' access is selected.

Screenshot 2: Step 4. Establish field-level security for reference field

- Left Sidebar:** Shows the 'Fields & Relationships' section under 'Fuel details'.
- Right Panel:** Titled 'New Relationship'. It shows field-level security settings for a Master-Detail relationship. A table lists profiles and their visibility and read-only status:

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	✓	✗
Analytics Cloud Security User	✓	✗
Authenticated Website	✓	✗
Authenticated Website	✓	✗
B2B Reordering Portal Buyer Profile	✓	✗
Contract Manager	✓	✗
Cross Org Data Proxy User	✓	✗

2.4 Page Layouts

In Salesforce, page layouts define the organization and arrangement of fields, buttons, related lists, and other components on an object's detail and edit pages. They allow you to control the user interface and tailor it to meet the specific needs of your organization.

Select the Consultant Layout page layout

Salesforce Setup - Object Manager

Verify your identity in Sales... - Student | Recently Viewed | Buyer | Sales... | Buyer | Salesforce | Object Manager | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5000002bz2P/PageLayouts/view

Cloud icon, Search Setup, Home, Object Manager

SETUP > OBJECT MANAGER
Buyer

Page Layouts

1 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Buyer Layout	Arunkumar R, 17/10/2023, 10:35 am	Arunkumar R, 17/10/2023, 3:02 pm

Quick Find, New, Page Layout Assignment

Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout

Salesforce Setup - Object Manager

Verify your identity in Sales... - Student | Recently Viewed | Buyer | Sales... | Buyer | Salesforce | Object Manager | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5000002bz2P/PageLayouts/new

Cloud icon, Search Setup, Home, Object Manager

SETUP > OBJECT MANAGER
Buyer

Create New Page Layout

Help for this Page

As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names are translated for your international users.

Existing Page Layout: Buyer Layout

Page Layout Name: customer layout

Save, Cancel

Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout

Salesforce Setup - Object Manager

Buyer Page Layout

Fields:

Section	Created By	Fuel filled in ve...
Section	Customer Name	Gas Station name
Blank Space	email	Phone Number
Amount Paid	Last Modified By	Vehicle type
Buyer	First Name	Last Name

Buyer Detail

Standard Buttons: Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Custom Buttons

Vehicle Info

Information (Header visible on edit only): Buyer GEN-2004-001234

Receipt Details

Mode of payment: Sample Text
Amount Paid: 951.38

Vehicle Info

Fuel filled in vehicle: 17.231
Vehicle type: Sample Text

Salesforce Setup - Object Manager

Buyer Page Layout

Fields:

Section	Created By	Fuel filled in ve...
Section	Customer Name	Gas Station name
Blank Space	email	Phone Number
Amount Paid	Last Modified By	Vehicle type
Buyer	First Name	Last Name

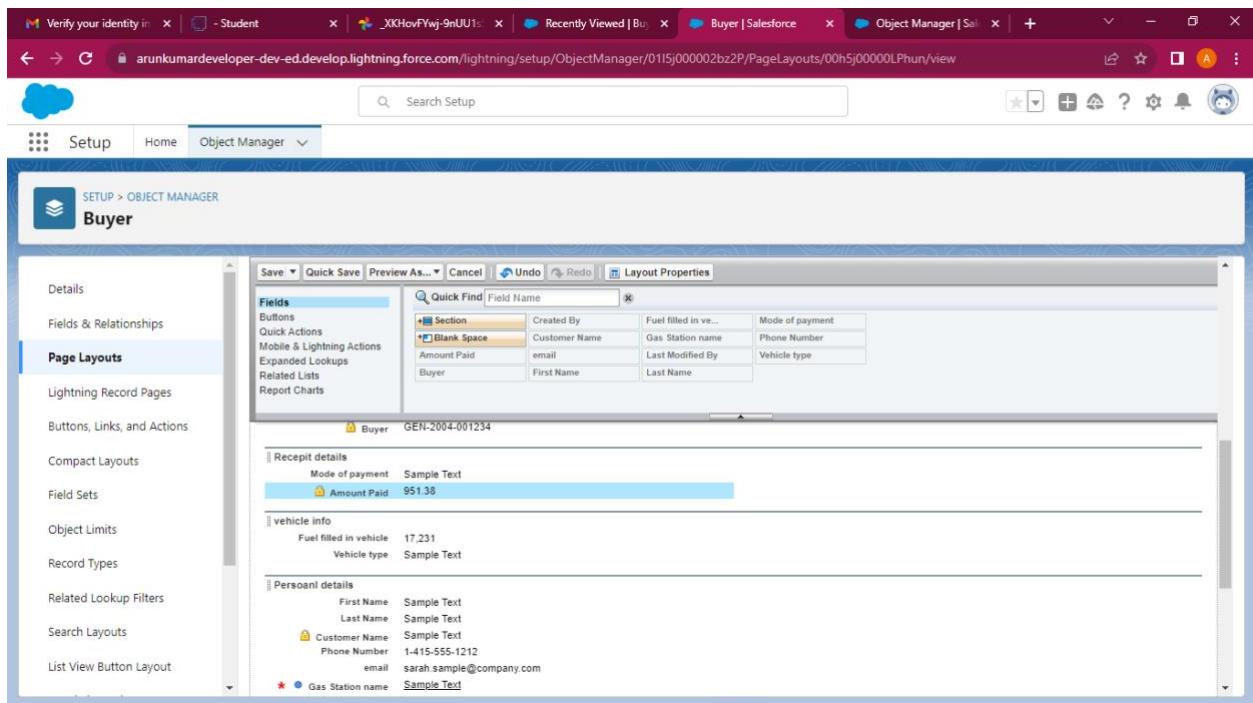
Personal Details

First Name: Sample Text
Last Name: Sample Text
Customer Name: Sample Text
Phone Number: 1-415-555-1212
Email: sarah.sample@company.com
Gas Station name: Sample Text

System Information (Header visible on edit only): Created By: Sample Text, Last Modified By: Sample Text

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only)



2.5 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

Salesforce Setup - Student

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

Cloud icon

Search Setup

Setup Home Object Manager

Q app

Salesforce Mobile App

Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

External Client Apps

Settings

Lightning Bolt

Flow Category

Lightning Bolt Solutions

Mobile Apps

Salesforce

Lightning Experience App Manager

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	01/10/2023, 10:37 am	Classic	✓
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	01/10/2023, 10:37 am	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	01/10/2023, 10:37 am	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry	01/10/2023, 10:40 am	Lightning	✓
5 Community	Community	Salesforce CRM Communities	01/10/2023, 10:37 am	Classic	✓
6 Content	Content	Salesforce CRM Content	01/10/2023, 10:37 am	Classic	✓
7 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage resources	01/10/2023, 10:37 am	Lightning	✓
8 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	01/10/2023, 10:37 am	Lightning	✓
9 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	01/10/2023, 10:37 am	Lightning	✓
10 Marketing	Marketing	Best-in-class on-demand marketing automation	01/10/2023, 10:37 am	Classic	✓
11 My_College	My_College	Informations	07/10/2023, 11:52 am	Lightning	✓
12 Platform	Platform	The fundamental Lightning Platform	01/10/2023, 10:37 am	Classic	✓
13 Queue Management	QueueManagement	Create and manage queues in business	01/10/2023, 10:37 am	Lightning	✓

New Lightning App

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: Gas Filling Station

* Developer Name: Gas_Filling_Station

Description: Application To Make The Gas Filling Station Easy Using CRM

App Branding

Image:

Primary Color Hex: #0070D2

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

Next

New Lightning App

App Options

Navigation and Form Factor

* Navigation Style: Standard navigation (selected)

* Supported Form Factors: Desktop and phone (selected)

Setup and Personalization

Setup Experience: Setup (full set of Setup options) (selected)

App Personalization Settings:

Disable end user personalization of nav items in this app

Disable temporary tabs for items outside of this app

Back

Next

New Lightning App

Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app.

Utility Bar: Default

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.

Back Next

ID	Category	Label	Description	Created Date	Modified Date	View
11	My_College	My_College	Informations	07/10/2023, 11:52 am	Lightning	✓
12	Platform	Platform	The fundamental Lightning Platform	01/10/2023, 10:37 am	Classic	✗
13	Quota Management	QuotaManagement	Create and manage sales quota business	01/10/2023, 10:37 am	Lightning	✗

New Lightning App

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 Selected Items

Back Next

ID	Category	Label	Description	Created Date	Modified Date	View
11	My_College	My_College	Informations	07/10/2023, 11:52 am	Lightning	✓
12	Platform	Platform	The fundamental Lightning Platform	01/10/2023, 10:37 am	Classic	✗
13	Quota Management	QuotaManagement	Create and manage sales quota business	01/10/2023, 10:37 am	Lightning	✗

New Lightning App

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 ▾**

Selected Items

Suppliers
Gas Stations
Buyer
Fuel details

Back **Next**

User Profiles

Choose the user profiles that can access this app.

Available Profiles **Create ▾**

Selected Profiles

System Administrator

Back **Save & Finish**

Lightning Bolt Solutions

Mobile Apps

11 My_College My_College Informations 07/10/2023, 11:52 am Lightning ✓

12 Platform Platform The fundamental Lightning Platform 01/10/2023, 10:37 am Classic

13 Queue Management QueueManagement Creates and manages queues for business 01/10/2023, 10:37 am Lightning ✓

Salesforce

Verify your identity in Salesforce - Student App Manager | Salesforce arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Setup Home Object Manager

App Launcher

Search Setup

Search apps or items... Visit AppExchange

Salesforce Data Marketing

Apps Service Console Sales

Digital Experiences Salesforce Scheduler Setup

My My_College Gas Filling Station

Flow Category Lightning Usage App

Lightning Bolt Solutions Marketing

Mobile Apps My_College

Salesforce Platform

Verify your identity in Salesforce - Student Recently Viewed | Suppliers | Sales arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/o/Supplier_c/list?filterName=Recent

Gas Filling Station Suppliers Gas Stations Buyer Fuel details

Suppliers Recently Viewed

0 items • Updated a few seconds ago

New Import Change Owner

Search this list...

Supplier Name

You haven't viewed any Suppliers recently.
Try switching list views.

The image shows two screenshots of the Salesforce interface. The top screenshot is from the 'App Manager' page, displaying various built-in and custom apps like Chatter, Content, Sales Console, and My_College. The bottom screenshot shows a 'Recently Viewed' list for 'Suppliers', which is currently empty. Both screenshots are taken from a browser window with a pink header.

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

Salesforce Setup - Student - Recently Viewed | Buyer | Salesforce - Profiles | Salesforce

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

Cloud Search Bar: Search Setup

Setup Home Object Manager

Profile Search: profile

Users Profiles

Didn't find what you're looking for? Try using Global Search.

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Edit Clone Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Edit Del ... B2B Reordering Portal Buyer Profile	External Apps Login	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit Clone Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/>	Edit Del ... Custom_Marketing_Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit Del ... Custom_Sales_Profile	Salesforce	<input checked="" type="checkbox"/>

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 | 1-25 of 43 | 0 Selected | Previous | Next | Page 1 of 2

Salesforce Setup - Student - Recently Viewed | Buyer | Salesforce - Profiles | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000005BCvN

Cloud Search Bar: Search Setup

Setup Home Object Manager

Profile Search: profile

Users Profiles

Didn't find what you're looking for? Try using Global Search.

Profile Standard User

Back to List: Custom Object Definitions

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Enabled External Credential Principal Access | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

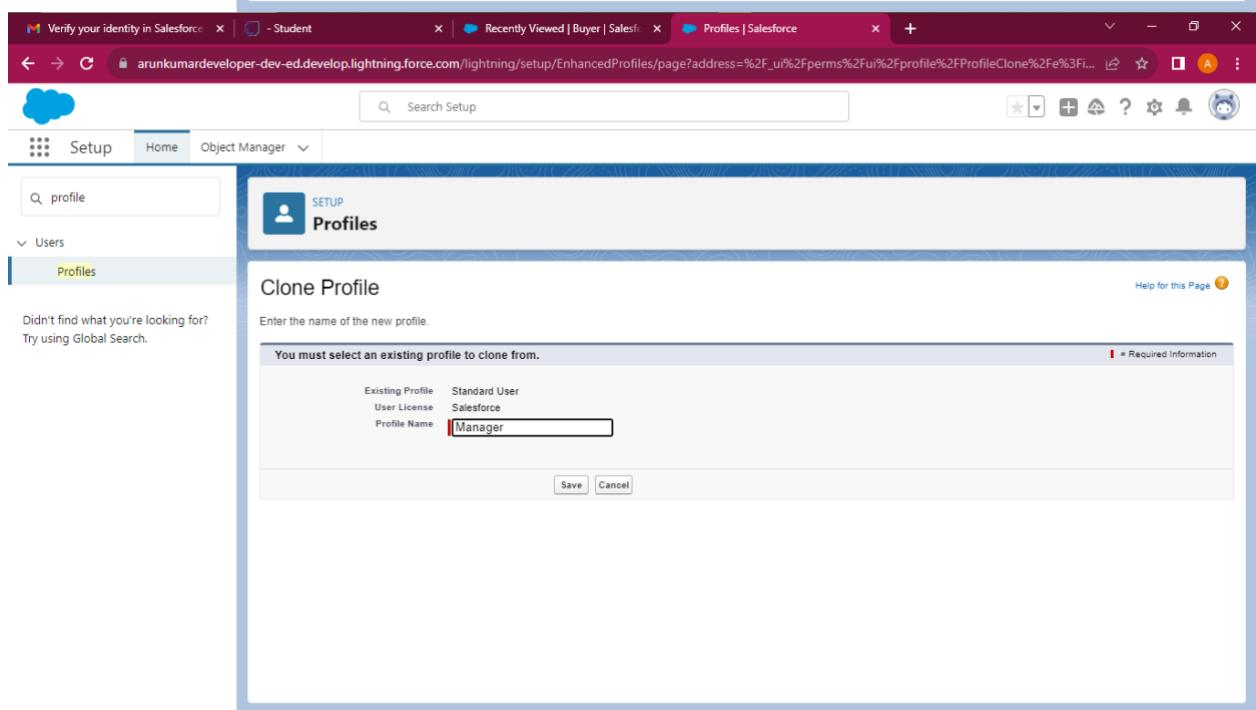
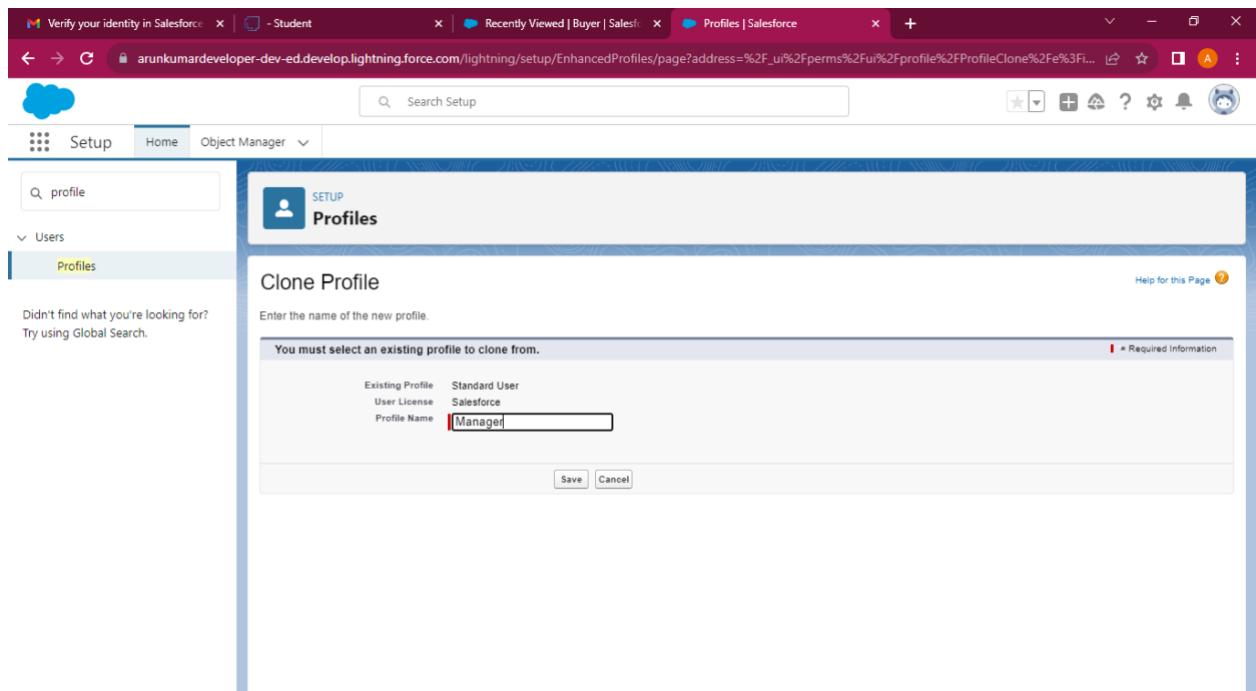
Profile Detail

Name	Standard User	Edit	Clone	View Users
User License	Salesforce	Custom Profile <input type="checkbox"/>		
Created By	salesforce.com, inc., 01/10/2023, 10:37 am	Modified By Arunkumar_R , 17/10/2023, 3:02 pm		

Page Layouts

Standard Object Layouts	Global	Object Milestone
Email Application	Not Assigned	Operating Hours
Home Page Layout	DE Default	Opportunity
Account	Account Layout	Opportunity Product

javascript:srcUp("%27%2F00e5j000005BCvN%3Fsdtp%3Dp1%27");



The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The top navigation bar includes tabs for 'Verify your identity in Salesforce', '- Student', 'Recently Viewed | Buyer | Sales...', 'Profiles | Salesforce', and a '+' button. The main content area displays the 'Profiles' setup page.

The screenshot shows the 'Custom App Settings' section of the Profiles setup page. It lists various app settings with checkboxes for 'Visible' and 'Default'. A note at the bottom right indicates that a red exclamation mark icon represents 'Required Information'.

	Visible	Default		Visible	Default	
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>		Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>		Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>		Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>		Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>		Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>		Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>		Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="radio"/>		Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>
Gas Filling Station (Gas_Filling_Station)	<input type="checkbox"/>	<input checked="" type="radio"/>		Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="radio"/>		Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="radio"/>		WDC (standard__Work)	<input checked="" type="checkbox"/>	<input type="radio"/>
My_College (My_College)	<input type="checkbox"/>	<input type="radio"/>				

The screenshot shows the 'Custom Object Permissions' and 'Session Settings' sections of the Profiles setup page. The 'Custom Object Permissions' section contains two tables of checkboxes for basic access and data administration. The 'Session Settings' section includes fields for session timeout and security level.

	Basic Access					Data Administration	
	Read	Create	Edit	Delete	View All	Modify All	
Bank	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Buyer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Colleges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Departments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Department details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

	Basic Access					Data Administration	
	Read	Create	Edit	Delete	View All	Modify All	
Departments	<input type="checkbox"/>						
Fuel details	<input checked="" type="checkbox"/>						
Gas Stations	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Management	<input type="checkbox"/>						
Student_details	<input type="checkbox"/>						
Suppliers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Survey_Result	<input type="checkbox"/>						

Session Settings
Session Times Out After: 8 hours of inactivity
Session Security Level Required at Login: --None--

Password Policies
User passwords expire in: Never expires
Enforce password history: 3 passwords remembered

Salesforce Setup - arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000Wd0K%2Fe%3Fr?url%3D%252F00e5j000... : :

Cloud Search Bar: Search Setup

Setup Home Object Manager

Search Bar: Q profile

Left Sidebar: Users Profiles

Profile Name: Profiles

Session Settings: Session Times Out After: 8 hours of inactivity, Session Security Level Required at Login: None

Password Policies:

- User passwords expire in: Never expires
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 3
- Lockout effective period: 30 minutes
- Obfuscate secret answer for password resets: checked
- Require a minimum 1 day password lifetime: unchecked
- Don't immediately expire links in forgot password emails: unchecked

Buttons: Save, Save & New, Cancel

Salesforce Setup - arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j000005BCus... : :

Cloud Search Bar: Search Setup

Setup Home Object Manager

Search Bar: Q profile

Left Sidebar: Users Profiles

Profile Name: Standard Platform User

Profile Description: Back to List: Custom Object Definitions Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Enabled External Credential Principal Access | Enabled External Data Source Access | Enabled External IP Ranges | Enabled Flow Access | Enabled External Credential Access | Enabled External Service Presence Status Access | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled Custom Setting Definitions Access | Enabled Custom Metadata Type Access | Enabled Custom Permissions

Profile Detail:

Name	Standard Platform User	Custom Profile	Modified By
User License	Salesforce Platform	<input type="checkbox"/>	Arun Kumar, 17/10/2023, 3:02 pm
Created By	salesforce.com, inc., 01/10/2023, 10:37 am		

Page Layouts:

Standard Object Layouts	Global	Object Milestone
Email Application	Not Assigned	Operating Hours
Home Page Layout	Home Page Default	Order
Account	Account Layout	Order Product

Global Layout [View Assignment] Object Milestone Layout [View Assignment]

Not Assigned [View Assignment] Operating Hours Layout [View Assignment]

Home Page Default [View Assignment] Order Layout [View Assignment]

Account Layout [View Assignment] Order Product Layout [View Assignment]

javascript:srcUp(%27%2F00e5j000005BCus%3Fsdtp%3Dp1%27);

Verify your identity in Salesforce - Student XVHonHDazGqLHTewf7ePV Recently Viewed | Buyer | Sales Profiles | Salesforce

arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_ui%2Fperms%2Fu%2Fprofile%2FProfileClone%2Fe%3Fis... 🔍 ⭐ 🌐 🌐 🌐 🌐 🌐 🌐 🌐 🌐 🌐

Cloud Search Setup Home Object Manager

Setup Search Setup

Q profile

Users Profiles

Didn't find what you're looking for? Try using Global Search.

Clone Profile

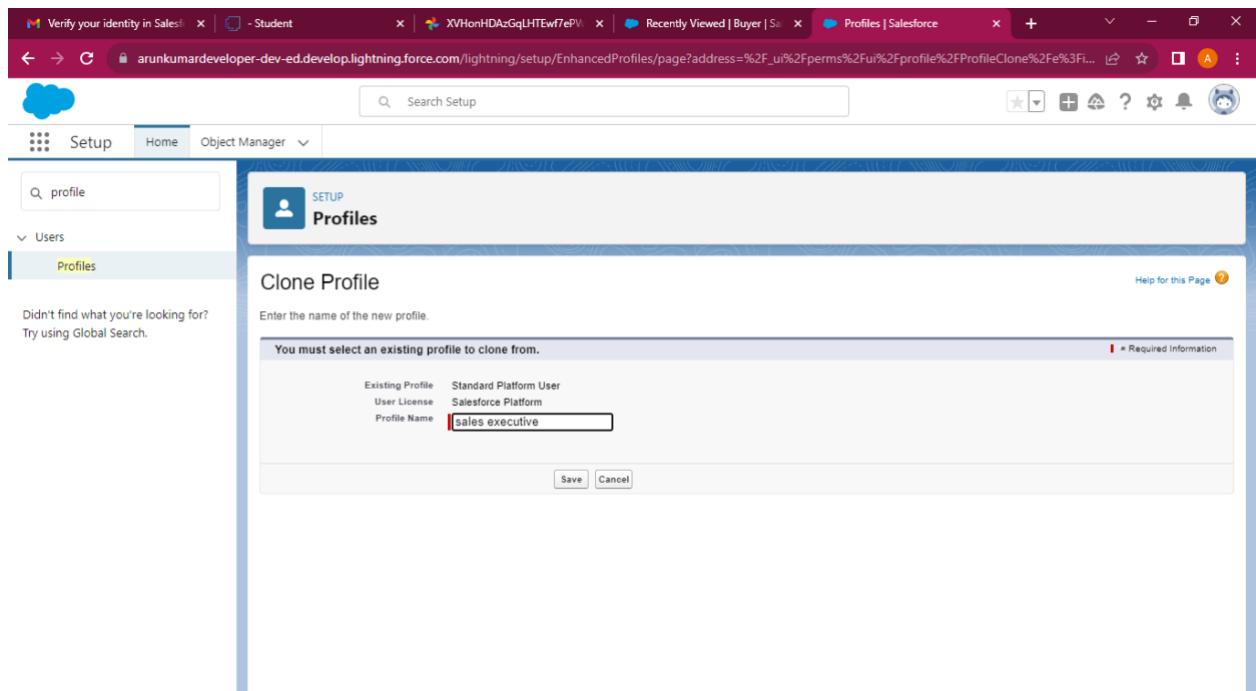
Enter the name of the new profile.

You must select an existing profile to clone from. * Required Information

Existing Profile	Standard Platform User
User License	Salesforce Platform
Profile Name	<input type="text" value="sales executive"/>

Save Cancel

Help for this Page



Verify your identity in Salesforce - Student RkEbaXZ-B2m-UY0k8gRTFH Recently Viewed | Buyer | Sales Profiles | Salesforce

arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000Wd0Z%2Fe%3FretURL%3D%252F00e5j000... 🔍 ⭐ 🌐 🌐 🌐 🌐 🌐 🌐 🌐 🌐 🌐

Cloud Search Setup Home Object Manager

Setup Search Setup

Q profile

Users Profiles

Didn't find what you're looking for? Try using Global Search.

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	My_College (My_College)	<input type="checkbox"/>	<input type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard_Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>
Gas Filling Station (Gas_Filling_Station)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard_Work)	<input type="checkbox"/>	<input type="radio"/>

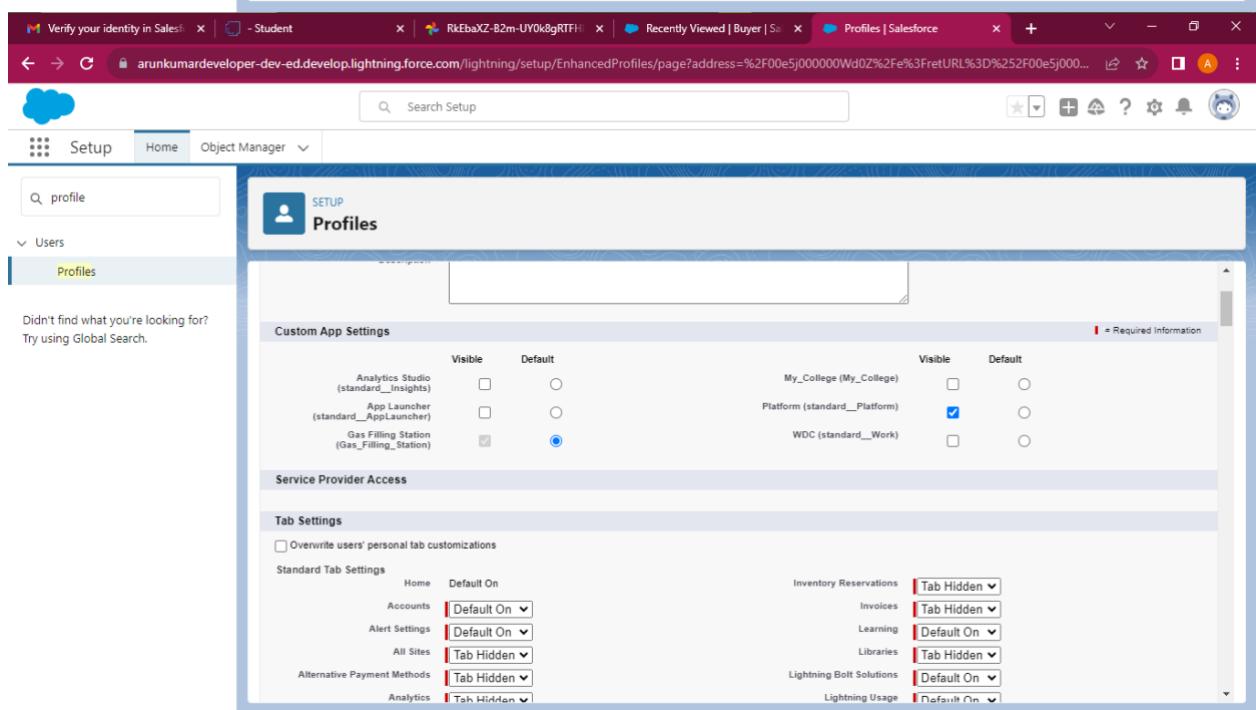
Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

	Home	Default On		Inventory Reservations	Tab Hidden
Accounts	<input type="button" value="Default On"/>	<input checked="" type="button" value="Default On"/>	Invoices	<input type="button" value="Tab Hidden"/>	
Alert Settings	<input type="button" value="Default On"/>	<input checked="" type="button" value="Default On"/>	Learning	<input type="button" value="Default On"/>	
All Sites	<input type="button" value="Tab Hidden"/>	<input checked="" type="button" value="Tab Hidden"/>	Libraries	<input type="button" value="Tab Hidden"/>	
Alternative Payment Methods	<input type="button" value="Tab Hidden"/>	<input checked="" type="button" value="Tab Hidden"/>	Lightning Bolt Solutions	<input type="button" value="Default On"/>	
Analytics	<input type="button" value="Tab Hidden"/>	<input checked="" type="button" value="Tab Hidden"/>	Lightning Usage	<input type="button" value="Default On"/>	



Salesforce Setup - Profiles

Verify your identity in Salesforce - Student | Recently Viewed | Buyer | Profiles | Salesforce

arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000Wd0Z%2Fe%3FretURL%3D%252F00e5j000... 🔍 ⭐ 🌐 🌐 🌐 🌐 🌐 🌐 🌐 🌐 🌐

Cloud icon

Search Setup

Setup Home Object Manager

Q profile

Users Profiles

Didn't find what you're looking for? Try using Global Search.

SETUP Profiles

Common Record Type Settings

	Contacts	Contact Point Addresses	Contact Point Consents	Contact Point Emails	Push Topics	Sellers	Streaming Channels	User External Credentials
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

Object	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Bank	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buyer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Colleges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Departments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Department details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Departments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fuel details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gas Stations	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student_details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Suppliers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Survey_Result	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Salesforce Setup - Profiles

Verify your identity in Salesforce - Student | Recently Viewed | Buyer | Profiles | Salesforce

arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5j00000Wd0Z%2Fe%3Fsetupid%3DEnhancedProfiles%26... 🔍 ⭐ 🌐 🌐 🌐 🌐 🌐 🌐 🌐 🌐 🌐

Cloud icon

Search Setup

Setup Home Object Manager

Q profile

Users Profiles

Didn't find what you're looking for? Try using Global Search.

SETUP Profiles

Profile sales executive

Back to List: Custom Object Definitions Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Enabled IP Ranges [] | Enabled Apex Class Access [] | Enabled Visualforce Page Access [] | Enabled External Data Source Access [] | Enabled Named Credential Access [] | Enabled External Credential Principal Access [] | Enabled Custom Metadata Type Access [] | Enabled Custom Setting Definition Access [] | Enabled Flow Access [] | Enabled Service Presence Status Access [] | Enabled Custom Permissions []

Profile Detail

Name	sales executive	Edit	Clone	Delete	View Users
User License	Salesforce Platform	Custom Profile <input checked="" type="checkbox"/>			
Description					
Created By	Anurkumar_B, 17/10/2023, 3:29 pm	Modified By Anurkumar_B, 17/10/2023, 3:31 pm			

Page Layouts

Standard Object Layouts

Global	Object Milestone
Global Layout [View Assignment]	Object Milestone Layout [View Assignment]
Email Application Not Assigned [View Assignment]	Operating Hours Layout [View Assignment]
Home Page Layout Home Page Default [View Assignment]	Order Layout [View Assignment]
Account Account Layout	Order Product Order Product Layout

The screenshot shows two consecutive screenshots of the Salesforce Setup interface.

Screenshot 1: Clone Profile

This screen allows you to clone an existing profile. It displays the following information:

- Existing Profile:** Standard Platform User
- User License:** Salesforce Platform
- Profile Name:** sales person (highlighted in red)

At the bottom are **Save** and **Cancel** buttons.

Screenshot 2: Profiles

This screen shows the configuration of permissions for various objects and custom objects. It includes sections for:

- Common Object Permissions:** Includes Contact, Contact Point Addresses, Contact Point Consents, and Contact Point Emails.
- Custom Object Permissions:** Shows permissions for objects like Bank, Buyer, Colleges, Customer, Departments, Department details, Departments, Fuel details, Gas Stations, Management, Student_details, Suppliers, and Survey_Result.

3.2 Setup Roles

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

Creating a Role

Verify your identity in Salesforce - Student - zt7TQjGyh-ZYGdd12hURQb - Recently Viewed | Buyer | Sales - Roles | Salesforce

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

Setup Home Object Manager

roles

Users Roles

Feature Settings

- Sales
 - Contact Roles on Contracts
 - Contact Roles on Opportunities
- Service
 - Case Teams
 - Case Team Roles
 - Contact Roles on Cases

Didn't find what you're looking for? Try using Global Search.

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy
View other sample Role Hierarchies: Territory-based Sample

* View & edit data, roll up forecasts, & generate reports for all users directly below.
* Can't access data of other Executive Staff

* View & edit data, roll up forecasts, & generate reports for all users directly below.
* Can't access data of users above or at same level

* View & edit data, roll up forecasts, & generate reports only for own data. Can't access data of users above or at same level

Set Up Roles

Don't show this page again

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

Verify your identity in Salesforce - Student - zt7TQjGyh-ZYGdd12hURQb - Recently Viewed | Buyer | Sales - Roles | Salesforce

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

Setup Home Object Manager

roles

Users Roles

Feature Settings

- Sales
 - Contact Roles on Contracts
 - Contact Roles on Opportunities
- Service
 - Case Teams
 - Case Team Roles
 - Contact Roles on Cases

Didn't find what you're looking for? Try using Global Search.

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.

Your Organization's Role Hierarchy

Show in tree view

Collapsible All Expand All

- arunkumar_developer
 - Add Role
 - CEO Edit | Del | Assign
 - Add Role
 - CFO Edit | Del | Assign
 - Add Role
 - COO Edit | Del | Assign
 - Add Role
 - SVP_Customer_Service & Support Edit | Del | Assign
 - Add Role
 - Customer Support, International Edit | Del | Assign
 - Add Role
 - Customer Support, North America Edit | Del | Assign
 - Add Role
 - Installation & Repair Services Edit | Del | Assign
 - Add Role
 - SVP_Human_Resources Edit | Del | Assign
 - Add Role
 - SVP_Sales & Marketing Edit | Del | Assign

Verify your identity in Salesforce - Student | Recently Viewed | Buyer | Salesforce | Roles | Salesforce

arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/Roles/page?address=%2F00E%2Fe%3Fparent%3D00E5j000002t5Rb%26setupid%3DRoles%26...

Setup Home Object Manager

roles

Users Roles Feature Settings Sales Service Case Teams Case Team Roles Contact Roles on Cases

Role Edit New Role

Role Edit

Label	Manager
Role Name	Manager
This role reports to	CEO
Role Name as displayed on reports	

Save Save & New Cancel

Help for this Page

Didn't find what you're looking for?
Try using Global Search.

The screenshot shows the 'Setup' interface with the 'Roles' tab selected. A new role is being created with the label 'Manager' and the role name 'Manager'. It reports to the 'CEO' role. The 'Role Edit' form includes fields for label, role name, reporting to, and display name on reports, along with save and cancel buttons. A help link is also present.

Verify your identity in Salesforce - Student | Recently Viewed | Buyer | Salesforce | Roles | Salesforce

arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/Roles/page?address=%2F00E5j00000UnoR%3Fsetupid%3DRoles

Setup Home Object Manager

roles

Users Roles Feature Settings Sales Service Case Teams Case Team Roles Contact Roles on Cases

Role Manager

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: arunkumar_developer > CEO > Manager
Siblings: SVP_Sales & Marketing, SVP_Customer Service & Support, CFO, SVP_Human Resources, COO

Users in Manager Role [0]

Role Detail

Label	Manager	Edit	Delete
This role reports to	CEO	Role Name	Manager
Modified By	Anunkumar R_ 17/10/2023, 3:36 pm	Sharing Groups	Role, Role and Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

Users in Manager Role

Assign Users to Role New User

No records to display

Help for this Page

Didn't find what you're looking for?
Try using Global Search.

The screenshot shows the 'Role Manager' page for the 'Manager' role. It displays the role's details, including its label ('Manager'), role name ('Manager'), reporting to ('CEO'), and various access rights. It also lists the hierarchy and siblings of the role. Below this, a table provides detailed information about the role's access levels. At the bottom, there is a section for managing users assigned to this role, which currently shows 'No records to display'.

Salesforce Setup - Student

Verify your identity in Salesforce - Student

Recently Viewed | Buyer | Salesforce

Roles | Salesforce

arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/Roles/page?address=%2F00E5j000000UnoR%3Fsetupid%3DRoles

Search Setup

Setup Home Object Manager

roles

Users Roles

Role Manager

Role Detail

Label Manager

This role reports to CEO

Modified By Arunkumar R. 17/10/2023, 3:36 pm

Opportunity Access Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities

Case Access Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases

Help for this Page

Users in Manager Role [0]

Assign Users to Role New User

No records to display

Salesforce Setup - Student

Verify your identity in Salesforce - Student

Recently Viewed | Buyer | Salesforce

Roles | Salesforce

arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/Roles/page?address=%2Fui%2Fsetup%2Fuser%2FRoleViewPage%3Fsetupid%3DRoles

Search Setup

Setup Home Object Manager

roles

Users Roles

Creating the Role Hierarchy

Your Organization's Role Hierarchy

Collapsible Tree View

- arunkumar_developer
 - CEO
 - Add Role
 - CFO
 - Add Role
 - COO
 - Add Role
 - Manager
 - Add Role
 - SVP_Customer_Service & Support
 - Add Role
 - Customer_Support_International
 - Add Role
 - Customer_Support_North_America
 - Add Role
 - Installation & Repair Services
 - Add Role

Verify your identity in Salesforce - Student | Recently Viewed | Buyer | Salesforce | Roles | Salesforce

arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/Roles/page?address=%2F00E%2Fe%3Fparent%3D00E5j00000UnoR%26setupid%3Droles%2...

Setup Home Object Manager

Q: roles

v Users Roles

v Feature Settings

v Sales Contact Roles on Contracts Contact Roles on Opportunities

v Service Case Teams Case Team Roles Contact Roles on Cases

Didn't find what you're looking for? Try using Global Search.

Role Edit

Label: sales executive
Role Name: sales_executive
This role reports to: Manager
Role Name as displayed on reports:

Save Save & New Cancel

Verify your identity in Salesforce - Student | Recently Viewed | Buyer | Salesforce | Roles | Salesforce

arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/Roles/home

Setup Home Object Manager

Q: roles

v Users Roles

v Feature Settings

v Sales Contact Roles on Contracts Contact Roles on Opportunities

v Service Case Teams Case Team Roles Contact Roles on Cases

Didn't find what you're looking for? Try using Global Search.

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.

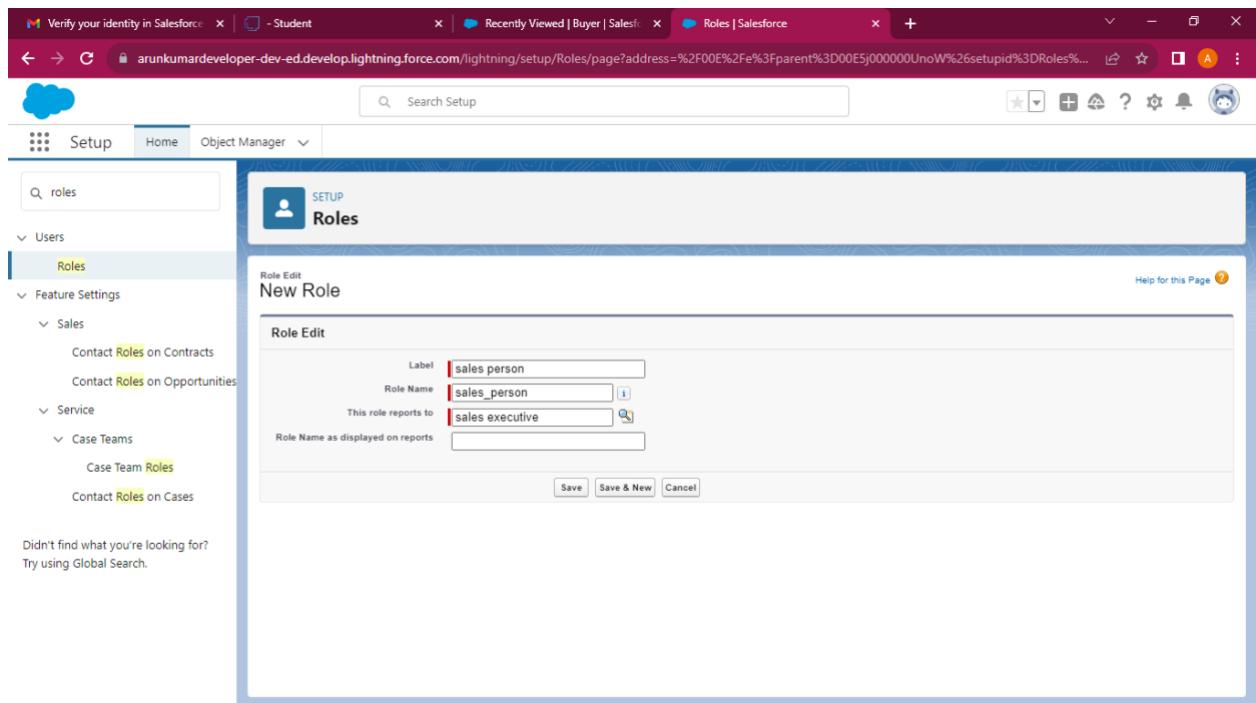
Your Organization's Role Hierarchy

Collapsible All Expand All

- arunkumar_developer
 - CEO
 - Add Role
 - CFO
 - Add Role
 - COO
 - Add Role
 - Manager
 - Add Role
 - sales_executive
 - Add Role
 - SVP_Customer_Service_&_Support
 - Add Role
 - Customer_Support_International
 - Add Role
 - Customer_Support_North_America
 - Add Role

Show in tree view

javascript:srcUp("%27%2F00E%2fe%3Fparent%3D00E5j00000UnoR%26setupid%3Droles%26retURL%3D%252Fu%252Fsetup%252Fuser%252FRoleViewPage%253Fsetupid%2526sdtp%253Dp1%26sdtp%3Dp1%27);



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. Every user in Salesforce has a user account.

Creating A Users

Salesforce Setup - User Management

arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home

Setup Home Object Manager

Search Setup

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users | Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	1_Manager	m1	manager1@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	2_Manager	m2	manager.bbb@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	Bank_Manager	mbank	manager.xxx@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Management
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d500000dbdnmead.0vu7d1vmdakd@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	R_Arunkumar	AR	ranunkumar1010@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Sales_Manager	msale	managersss@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Salesforce API Only System Integrations
<input type="checkbox"/>	User_Integration	integ	integration@00d500000dbdnmead.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightsecurity@00d500000dbdnmead.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User | Reset Password(s) | Add Multiple Users

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

Salesforce Setup - User Management

arunkumardeveloper-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055j00000A5qh1%2Fe%3FisUserEntityOverride%3D1%26...

Setup Home Object Manager

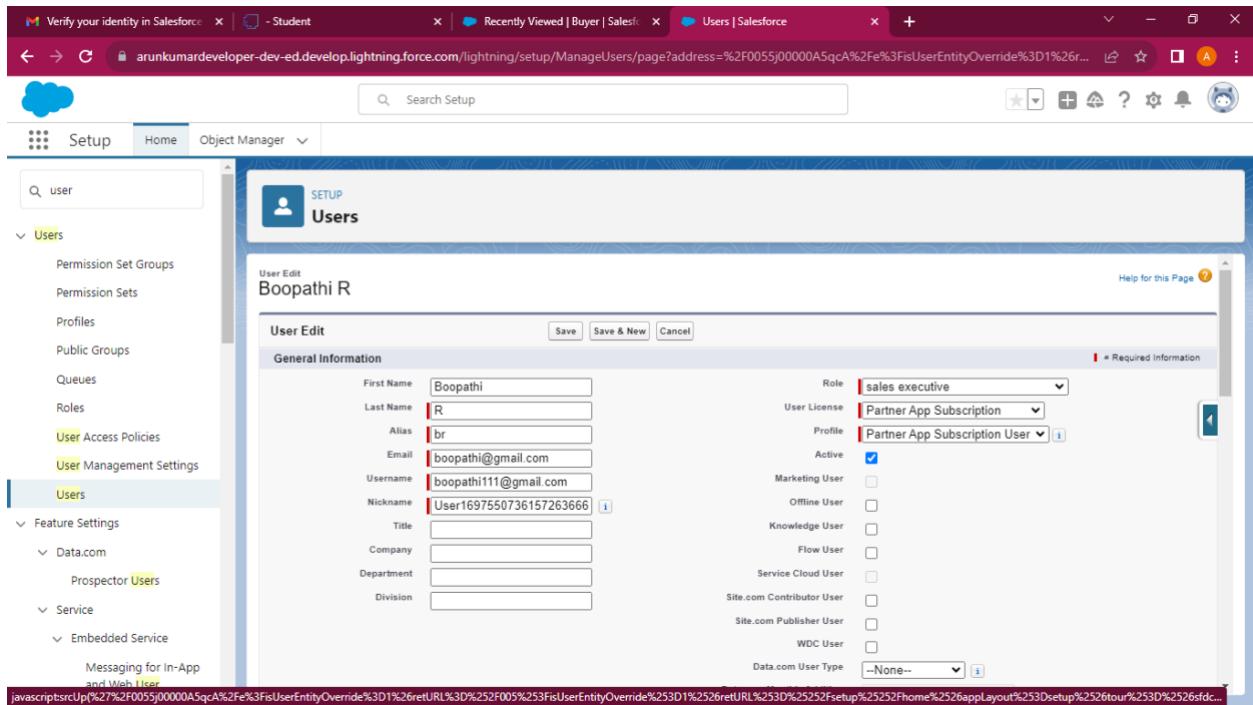
Search Setup

User Edit Jega B

General Information

First Name: Jega
Last Name: B
Alias: jb
Email: jega12@gmail.com
Username: jega12@gmail.com
Nickname: User1697551534280962455
Title:
Company:
Department:
Division:

Role: sales person
User License: Partner App Subscription
Profile: Partner App Subscription User
Active:
Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
Site.com Publisher User:
WDC User:
Data.com User Type: --None--
Data.com Monthly Addition: 200



3.4 User Adoption & Approval

It is the interaction with database and their records.

Create Our Customer Record

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

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

SETUP Permission Sets

Permission Sets

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

All Permission Sets Edit | Delete | Create New View

New

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

Page 1 of 2

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=%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

SETUP Permission Sets

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-

Salesforce Setup - arunkumardeveloper-dev-ed.lightning.force.com

Permission Sets | Salesforce

Setup Home Object Manager

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 Users

javascriptsrcSelf(%2FOP5j000008QkCp%3Fs%3DEntityPermissions%26isdp%3D...)

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...

Search Setup

Setup Home Object Manager

Permission Sets

P1

Find Settings... Clone Delete Edit Properties Manage Assignments View Summary (Beta)

Video Tutorial | Help for this Page

Permission Set Overview

Description: P1

License: None

Session Activation Required: No

Permission Set Groups Added To: 0

API Name: P1

Namespace Prefix: None

Created By: Arunkumar_R 17/10/2023, 8:54 pm

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: None

Salesforce Setup - arunkumardeveloper-dev-ed.lightning.force.com

Permission Sets | Salesforce

Setup Home Object Manager

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 Users

javascriptsrcSelf(%2FOP5j000008QkCp%3Fs%3DEntityPermissions%26isdp%3D...)

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%3Fs%3DEntityPermissions%26isdp%3D...)

Search Setup

Setup Home Object Manager

Permission Sets

P1

Find Settings... Clone Delete Edit Properties Manage Assignments View Summary (Beta)

Video Tutorial | Help for this Page

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	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 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	--

The screenshots illustrate the configuration of a Permission Set in Salesforce. The left sidebar shows the navigation menu under 'Users' with 'Permission Sets' selected. The main area displays the 'Permission Sets' page for 'P1'. The 'Object Permissions' section for the 'Accounts' object is shown, listing permissions like Read, Create, Edit, Delete, View All, and Modify All. In the first screenshot, none of these checkboxes are checked. In the second screenshot, the 'Read' and 'Create' checkboxes are checked, while others remain unchecked.

CHAPTER-4

AUTOMATION

4.1 Flow

The last business rule functionality to implement before testing your application is a rule to set the Out-of-State checkbox field on the Travel Approval object if out-of-state travel has been chosen. Salesforce offers workflow capabilities that

provide a declarative, drag-and-drop design environment to build our business process logic.

The screenshots illustrate the Salesforce Flow Builder interface, showing the setup and creation of flows.

Top Screenshot: Flow Definitions

This screenshot shows the 'Flow Definitions' list in the 'Setup' section. The list includes:

Flow Label	Process Type	Package State
Basic Approval Request	Flow Orchestration for CMS	Managed-Installed
Book Appointment from Invitation	Salesforce Scheduler Flow	Managed-Installed
Cancel Item Flow	Screen Flow	Managed-Installed
Change Case Owner to Incident Owner	Screen Flow	Managed-Installed
Close Change Request & Related Issues	Screen Flow	Managed-Installed
CMS: Check Whether Any Step is Completed	Evaluation Flow	Managed-Installed
CMS: Notify Content Author	Screen Flow	Managed-Installed
CMS: Review Content	Screen Flow	Managed-Installed
CMS: Submit Content for Review	Screen Flow	Managed-Installed
CMS: Withdraw Review Request	Screen Flow	Managed-Installed
Create a Case	Screen Flow	Managed-Installed

Bottom Screenshot: New Flow

This screenshot shows the 'New Flow' creation screen. The 'Core' category is selected, displaying the following flow types:

- Screen Flow: Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and...
- Record-Triggered Flow: Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
- Schedule-Triggered Flow: Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.
- Platform Event—Triggered Flow: Launches when a platform event message is received. This autolaunched flow runs in the background.
- Autolaunched Flow (No Trigger): Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.
- Record-Triggered Orchestration: Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.

A 'Create' button is located at the bottom right of the screen.

Verify your identity in... - Student | Estimation amount | Flows | Salesforce | Flows | Salesforce | Flow Builder

arunkumardeveloper-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app

Flow Builder

Select Elements Auto-Layout Run Debug View Tests Activate Save As Save

Record-Triggered Flow Start → Run Immediately → End

Select Object
Select the object whose records trigger the flow when they're created, updated, or deleted.
* Object: Buyer

Configure Trigger
* Trigger the Flow When:
 A record is created
 A record is updated
 A record is created or updated
 A record is deleted

Set Entry Conditions
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.
If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements: None

Verify your identity in... - Student | Estimation amount | Flows | Salesforce | Flows | Salesforce | Flow Builder

arunkumardeveloper-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app

Flow Builder

Select Elements Auto-Layout Run Debug View Tests Activate Save As Save

Record-Triggered Flow Start → Run Immediately → End

* Trigger the Flow When:
 A record is created
 A record is updated
 A record is created or updated
 A record is deleted

Set Entry Conditions
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.
If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

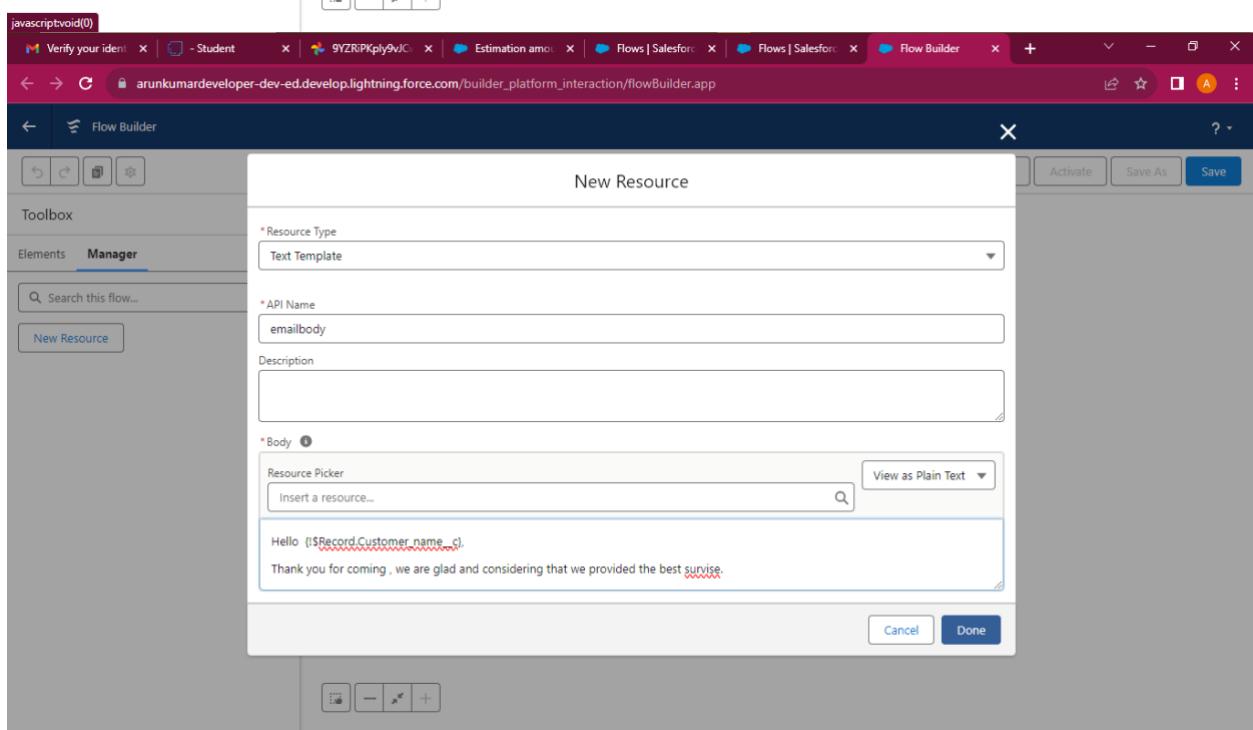
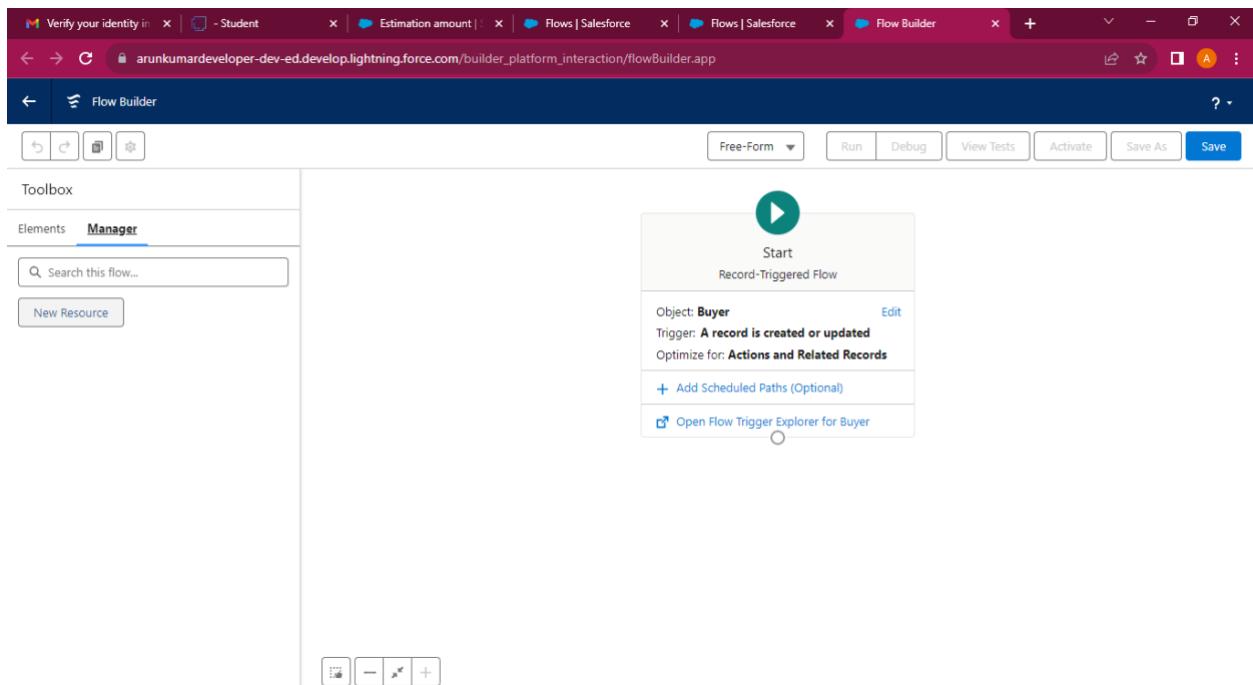
Condition Requirements: None

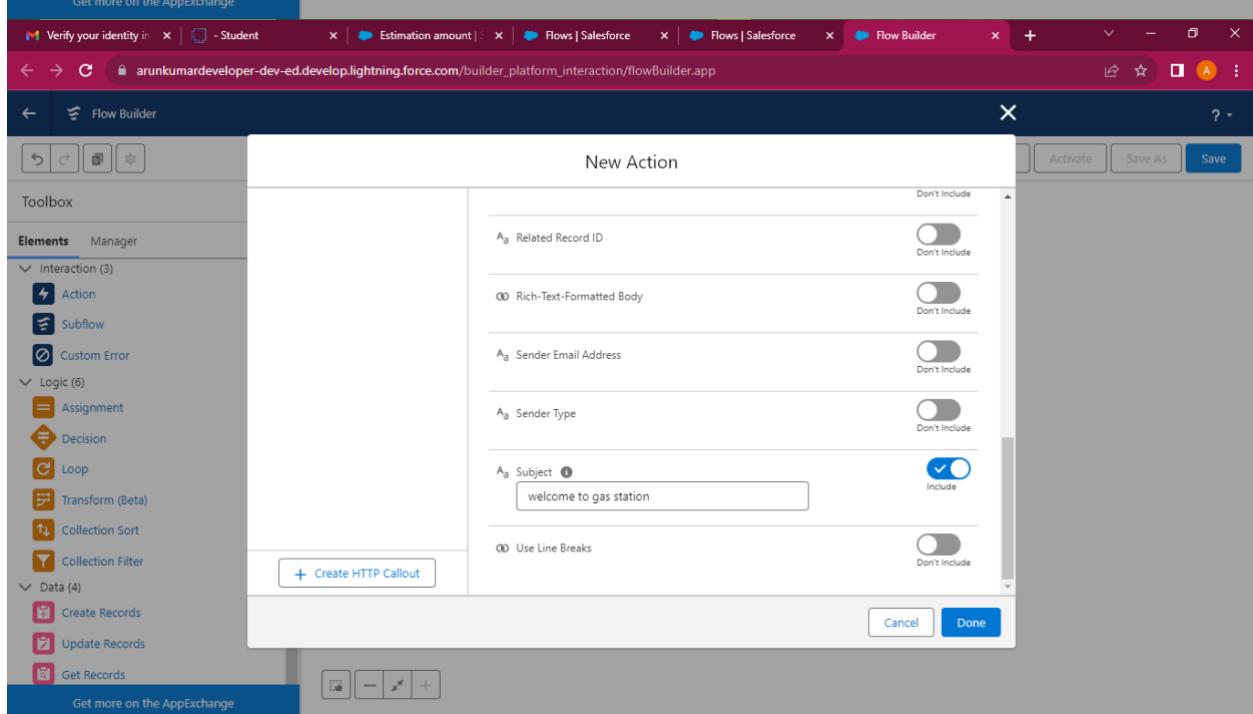
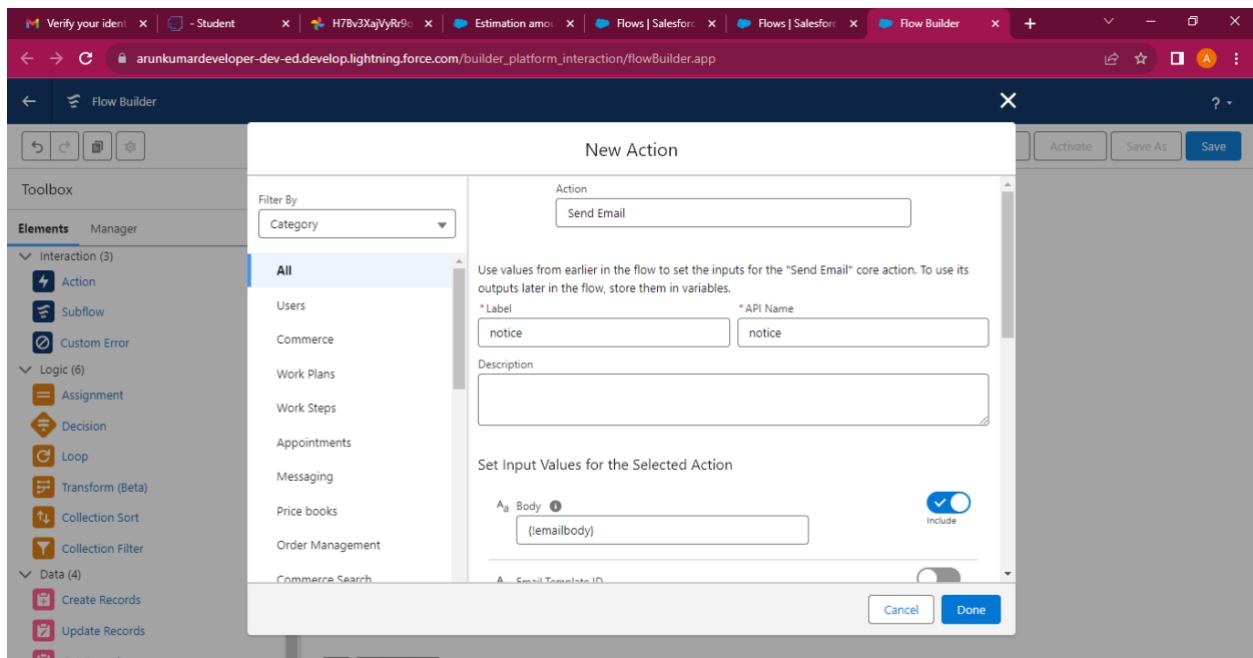
* Optimize the Flow for:

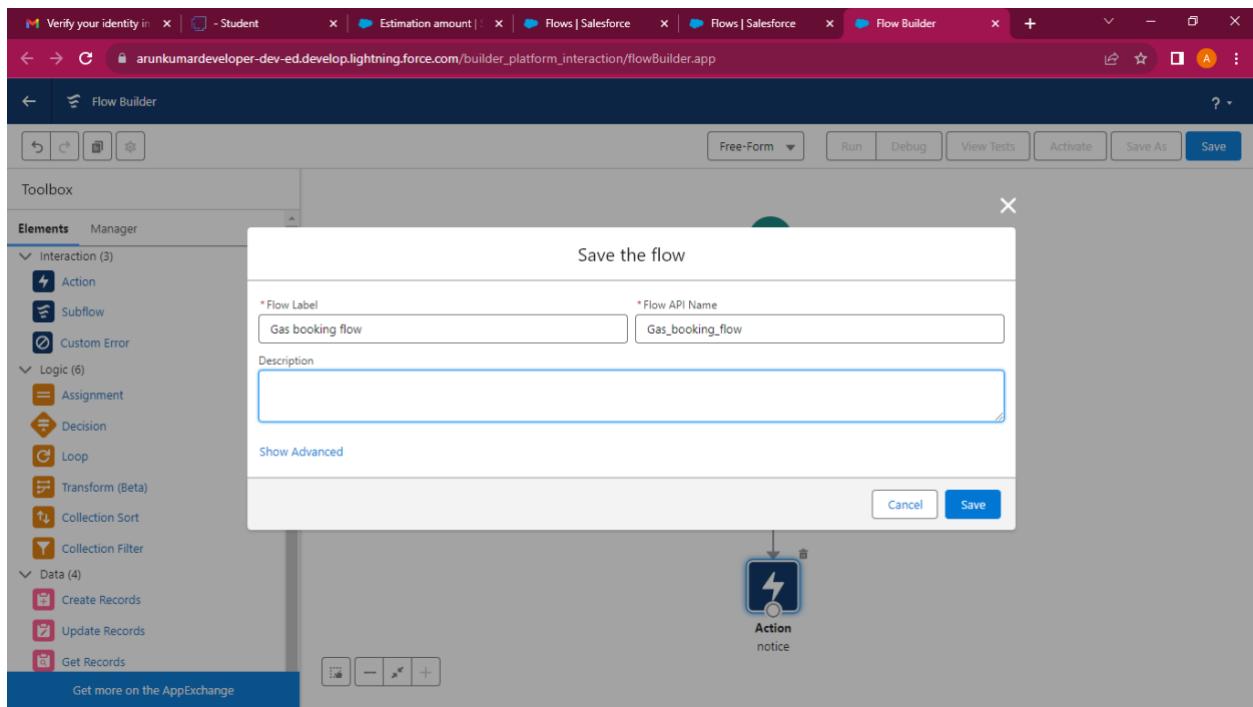
Fast Field Updates
Update fields on the record that triggers the flow to run. This high-performance flow runs **before** the record is saved to the database.

Actions and Related Records
Update any record and perform actions, like send an email. This more flexible flow runs **after** the record is saved to the database.

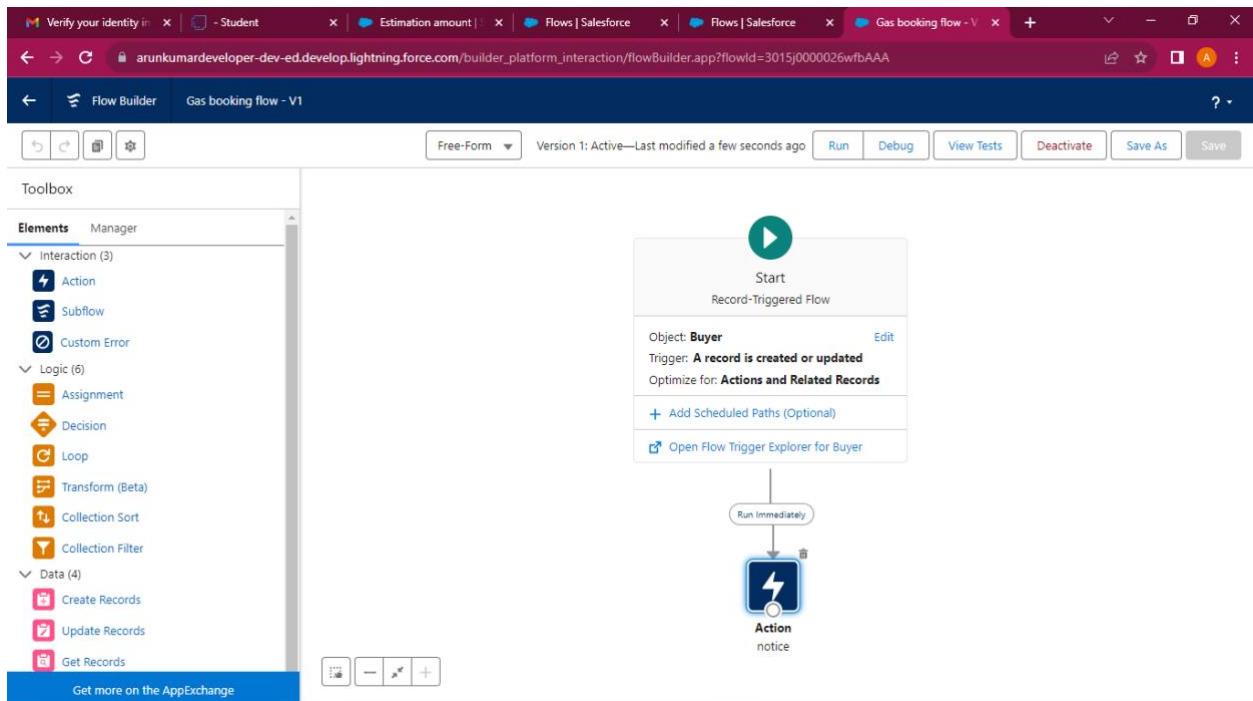
Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed







12222



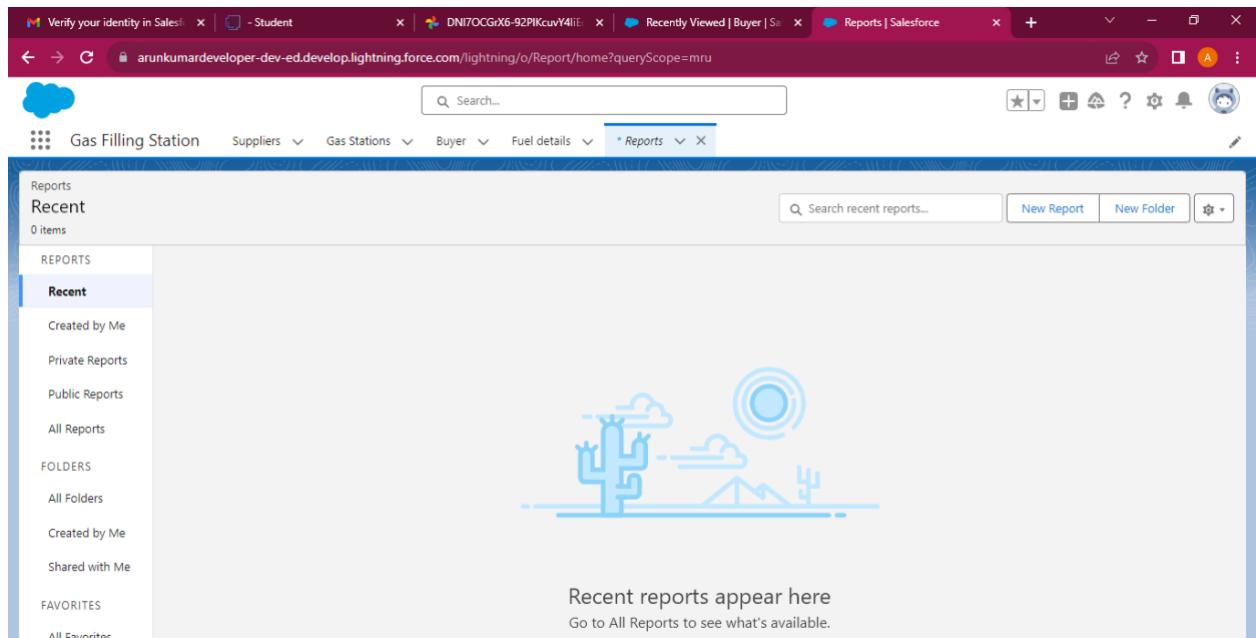
CHAPTER-5

REPORTS & DASHBOARD

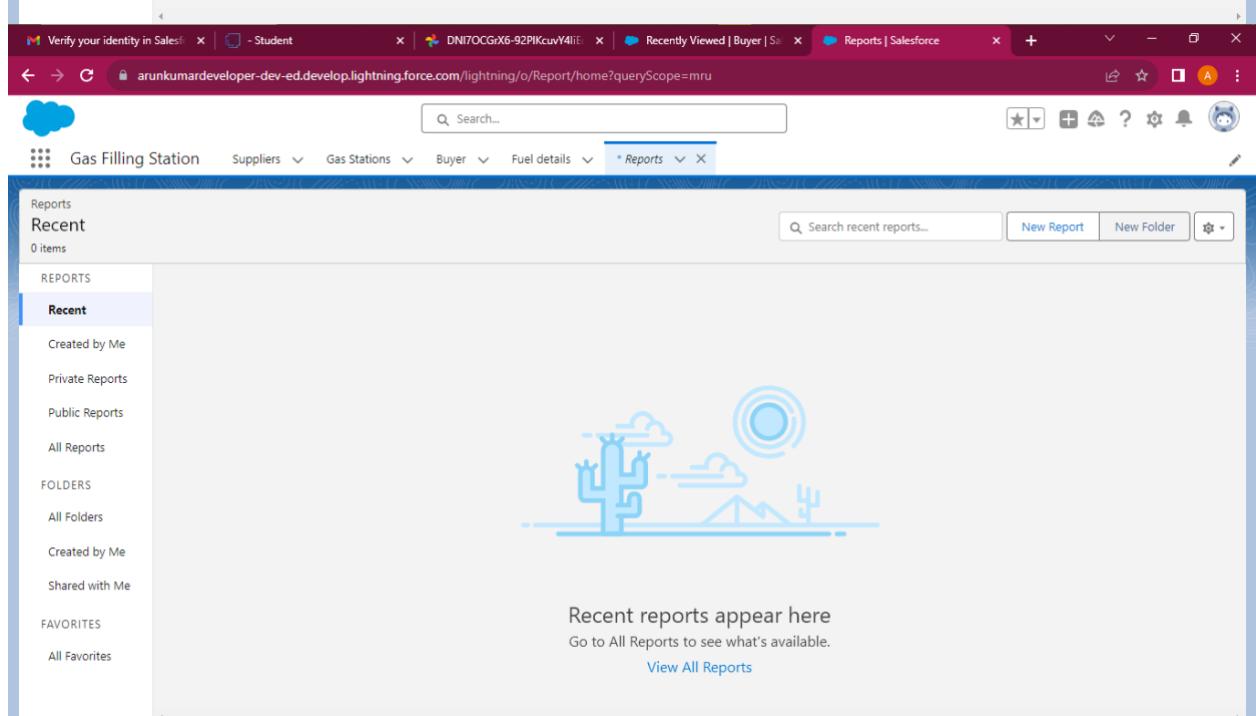
5.1 Reports

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



The screenshot shows the Salesforce Lightning Report Home page. The left sidebar contains a navigation menu with sections for Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), Folders (All Folders), and Favorites (All Favorites). The main content area features a decorative illustration of a cactus, clouds, and a sun. Below the illustration, a message reads "Recent reports appear here" followed by "Go to All Reports to see what's available." A "View All Reports" button is present. The top navigation bar includes tabs for Verify your identity in Sales..., Student, DNI7OCGrX6-92PIKuvY4liE, Recently Viewed | Buyer | S..., Reports | Salesforce, and a search bar. The top right corner has various icons for account management and reporting.



This screenshot shows the same Salesforce Lightning Report Home page as the first one, but with a different set of recent reports listed on the left sidebar under the "Recent" section. The reports listed are "Created by Me", "Private Reports", "Public Reports", and "All Reports". The rest of the page, including the decorative illustration and the "View All Reports" button, remains identical to the first screenshot.

The screenshot shows the Salesforce Reports home page. On the left, there's a sidebar with categories like Reports, Recent, and Folders. The main area displays a 'Recent' section with 0 items. A modal window titled 'Create folder' is open, prompting for a 'Folder Label' (set to 'Fuel Estimation') and a 'Folder Unique Name' (set to 'FuelEstimation'). Below the modal, a message says 'Recent reports appear here' with a link to 'View All Reports'. The top navigation bar includes tabs for Verify your identity in Salesforce, Student, DNI7OCGrX6-92PIKcuvY4liE, Recently Viewed | Buyer | S, Reports | Salesforce, and a search bar.

This screenshot shows the same Salesforce Reports home page after creating a new folder. The 'Recent' section now lists one item: 'Sample Flow Report: Screen Flows', which was created by an 'Automated Process' on 1/10/2023 at 10:37 am. The report has a description: 'Which flows run, what's the status of each interview, and how long do users take to complete the screens?'. The sidebar and top navigation bar remain consistent with the first screenshot.

Screenshot of the Salesforce Lightning interface showing the Reports section.

The top navigation bar includes tabs for "Verify your identity in Salesforce", "Student", "Reports | Salesforce", and "Analytics | Salesforce". The URL is "arunkumardeveloper-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=userFolders".

The main header has a search bar and a toolbar with icons for favorite, new report, new folder, and more.

The page title is "Gas Filling Station" under "Reports All Folders".

The main content is a table listing reports and folders:

	Name	Created By	Created On	Last Modified By	Last Modified Date
REPORTS					
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

A context menu is open over the "Fuel Estimation" folder, showing options: Favorite, Share, Rename, and Delete.

The sidebar on the left includes sections for Reports, Folders, and Favorites.

The second screenshot shows the "Share folder" dialog box:

Share folder

These sharing settings apply to all subfolders in this folder.

Share With:

- Roles: Manager
- Access: View

Share

Who Can Access:

- Arunkumar R (Users)

Done

The screenshot shows the Salesforce interface with the title bar "Verify your identity in Salesforce - Student Reports | Salesforce Buyer | Salesforce Recently Viewed | Buyer | Sa". The main content area displays a list titled "Buyer Recently Viewed" with 10 items updated a few seconds ago. The list contains entries from 1 to 10, each labeled "Buyer-0XX". The interface includes a search bar, a toolbar with "New" and "Import" buttons, and various navigation links like "Suppliers", "Gas Stations", "Fuel details", "Reports", and "Analytics".

The screenshot shows the Salesforce interface with the title bar "Verify your identity in Salesforce - Student Reports | Salesforce Reports | Salesforce Reports | Salesforce". The main content area displays a list titled "Recent" under the "Reports" section. It shows one report entry: "Sample Flow Report: Screen Flows", which was created by "Automated Process" on 1/10/2023 at 10:37 am. The sidebar on the left lists categories such as "Recent", "Created by Me", "Private Reports", "Public Reports", "All Reports", "Folders", "Created by Me", "Shared with Me", and "Favorites". The bottom of the page has a footer with "javascript:void(0);".

Verify your identity in Salesforce - Student - Report Builder | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/one/one.app#eyJjb2lwb25ibnREZWYiOiJyZXBvcnRzOnJlcG9ydEJ1aWxkZXIiLCJhdHRyaWJ1dGVzIjp7InJlY29yZEI...

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 - Report Builder | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/one/one.app#eyJjb2lwb25ibnREZWYiOiJyZXBvcnRzOnJlcG9ydEJ1aWxkZXIiLCJhdHRyaWJ1dGVzIjp7InJlY29yZEI...

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

Groups

- GROUP ROWS Add group...
- GROUP COLUMNS Add group...

Columns

- Add column...
- # Fuel filled in vehicle
- Customer Name
- # Amount Paid

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

Add Chart Save & Run Save Close Run

Screenshot of the Salesforce Report Builder interface showing the creation of a conditional formatting rule.

Report Title: New Gas Stations with Buyer Report / Gas Stations with Buyer

Fields:

- Groups: Fuel Available in bunk
- Columns: # Fuel filled in vehicle, Customer Name, # Amount Paid

Conditional Formatting Rule: Add Conditional Formatting Rule for Sum of Amount Paid

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

Conditional Formatting Rules:

Rule ID	Condition	Action
1	Sum of Amount Paid 1,000 5,000	Edit Delete

Buttons: Cancel, Done, Apply

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

The dialog box contains the following fields:

- 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 configuration interface with sections for Groups, Columns, and Fields.

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

The screenshot shows the Salesforce Report Builder interface. The report title is "Gas Stations with Buyer". The report details the fuel available in bunk, fuel filled in vehicle, customer name, and amount paid. The data is grouped by buyer. The report builder interface includes sections for Groups, Columns, and various reporting options like Row Counts, Detail Rows, Subtotals, and Grand Total.

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

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

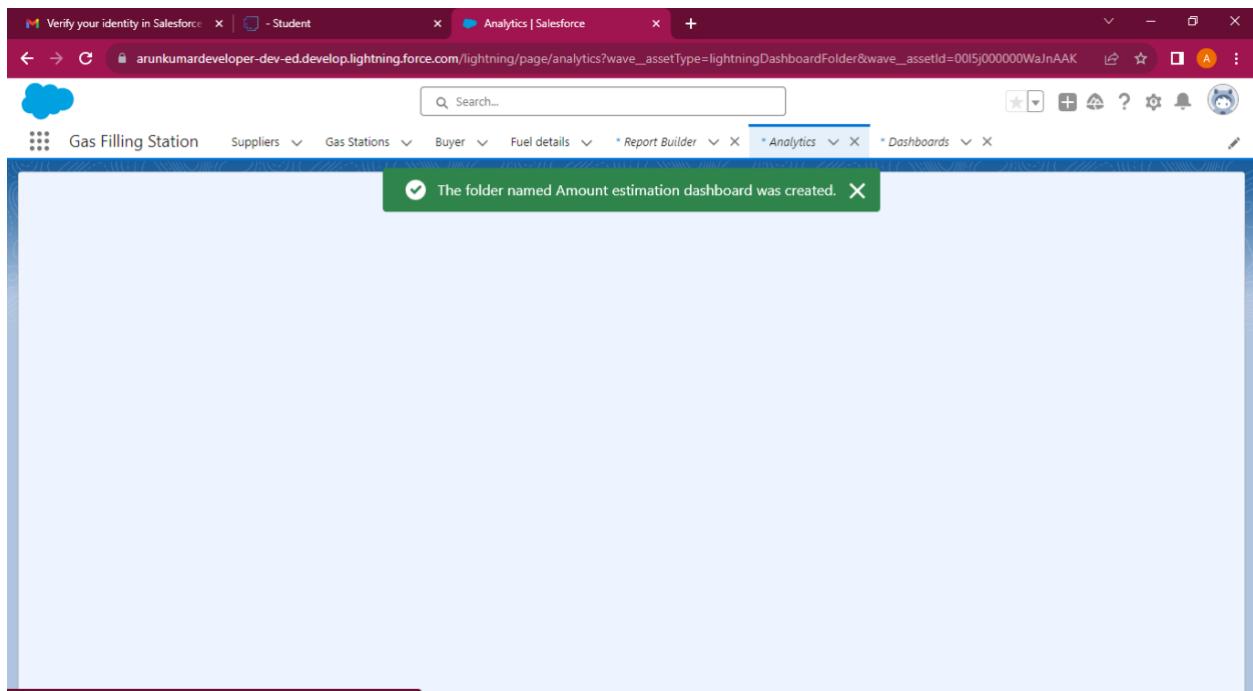
Create folder

*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](#)



This screenshot shows the 'Analytics' section of the Salesforce interface. On the left, there's a sidebar with 'Analytics' navigation (Home, Browse, Favorites), 'Collections' (Create a collection to start organizing your analytics content), and a plus sign icon. The main area is titled 'Browse > Amount estimation dashboard'. It features a search bar, filter buttons for 'All Items', 'Dashboards', and 'Folders', and four date filters: 'Created By Anybody', 'Created On Any Date', 'Last Modified By Anybody', and 'Last Modified On Any Date'. Below these filters, a section titled 'Asset Results' shows a message: 'No items to display. Try different filters to see more results.' with a 'Learn More' link.

Salesforce screenshot showing the 'Dashboards | Salesforce' tab open. The page displays a list of dashboards and folders under 'All Folders'. A specific dashboard named 'Amount estimation dashboard' is selected.

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

Salesforce screenshot showing the 'Share folder' dialog box open over the 'Dashboards | Salesforce' tab. The dialog allows sharing settings for the selected 'Amount estimation dashboard'.

The 'Share With' section shows a 'Names' input field containing 'Manager' and an 'Access' dropdown set to 'View'.

The 'Who Can Access' section shows a user named 'Arunkumar R' with 'Users' selected in the 'Manage' dropdown.

A 'Done' button is visible at the bottom right of the dialog.

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#eyJjb21wb25lbnREZWYiOjkzXNrdG9wRGFzaGlvYJkczpkYXNoYm9hcmQjLCJhdHRyaWJ1dGVzIj... ★ + ? ⚙️ 📡

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

Cloud Search... + Component + Filter Save Done

New Dashboard

Name: Estimation amount

Description:

Folder: Amount estimation dashboard Select Folder

Cancel Create

Verify your identity in Salesforce - Student Estimation amount | Salesforce

arunkumardeveloper-dev-ed.develop.lightning.force.com/one/one.app#eyJjb2lwb25ibnREZWYiOjkzXNrdG9wRGFzaGlvYXkczpkYXNoYm9hcmQjLCJhdHRyaWJ1dGVzI... 🔍 ⭐ 🌐 ? 🏷️ 📡

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

Estimation amount + Component + Filter ⚙️ Save Done

A large, empty grid with a light gray background, representing a data table or estimation grid. It consists of approximately 20 columns and 20 rows.

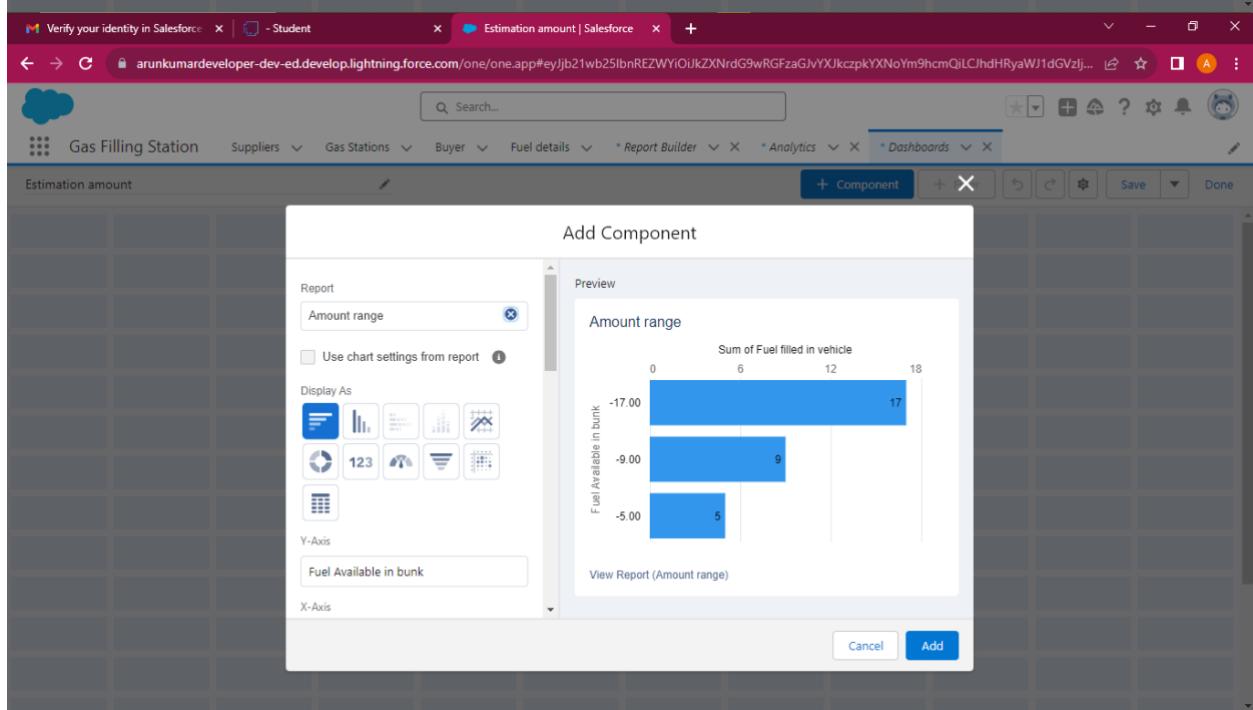
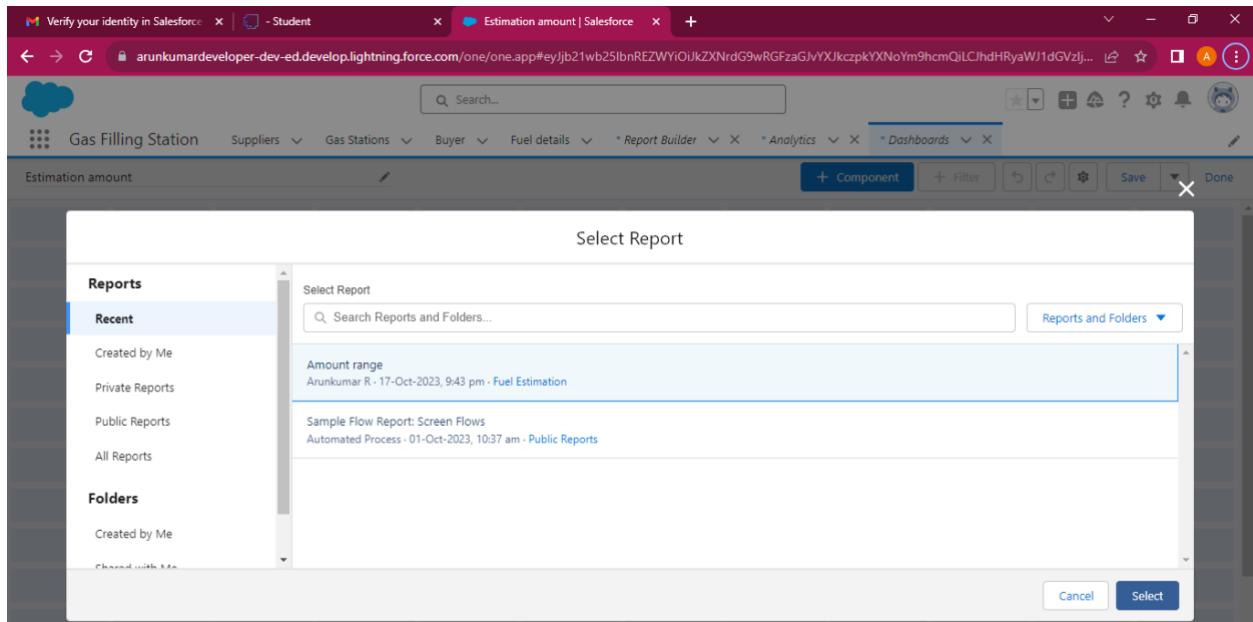
Verify your identity in Salesforce - Student Estimation amount | Salesforce

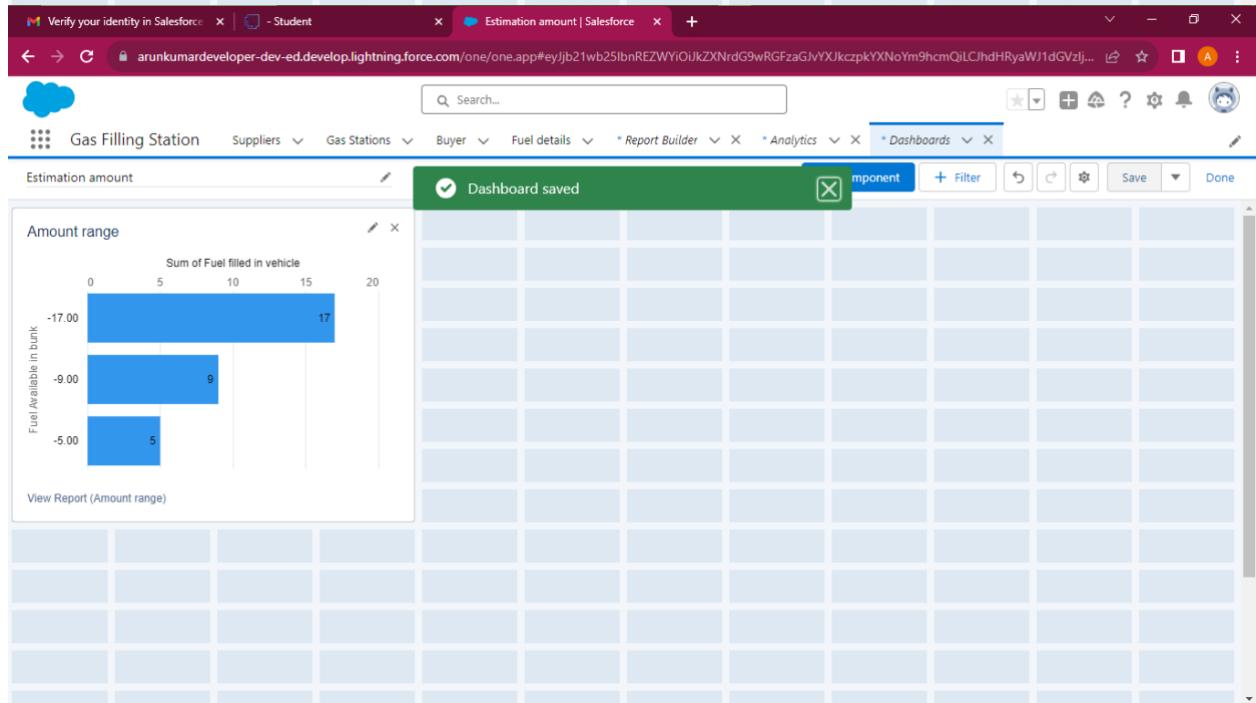
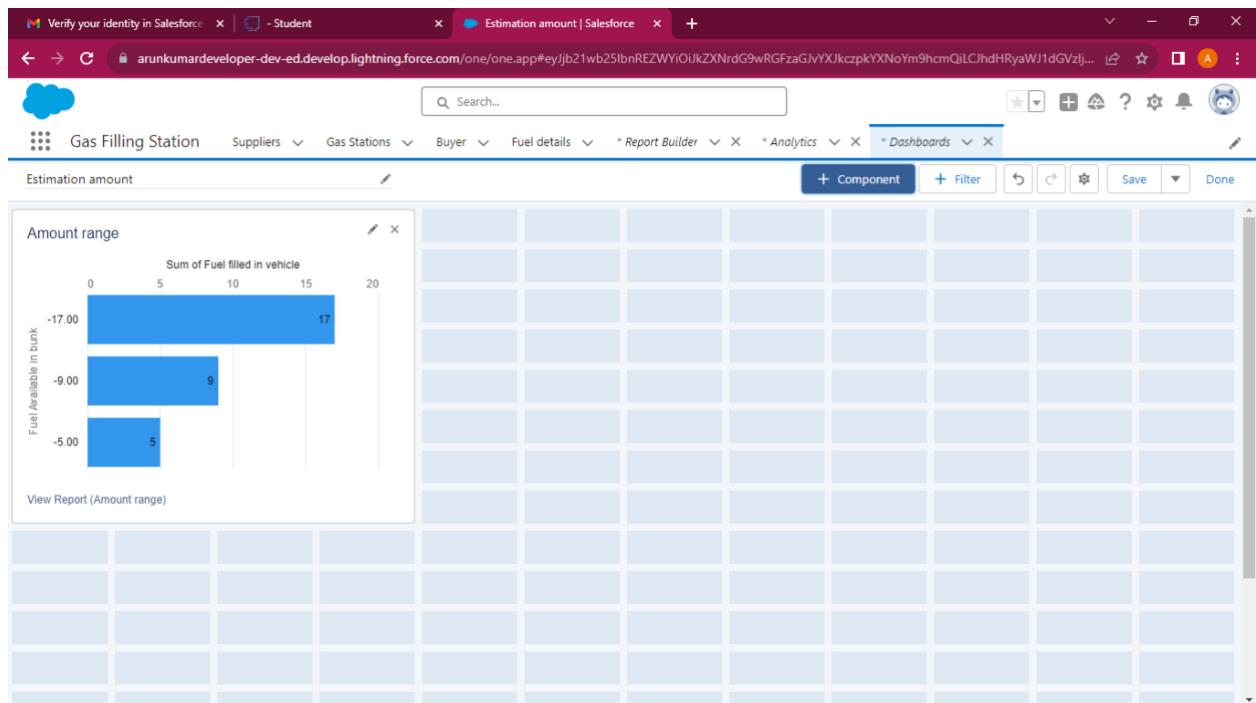
arunkumardeveloper-dev-ed.develop.lightning.force.com/one/one.app#eyJjb2lwb25ibnREZWYiOjkzXNrdG9wRGFzaGlvYXkczpkYXNoYm9hcmQjLCJhdHRyaWJ1dGVzI... 🔍 ⭐ 🌐 ? 🏷️ 📡

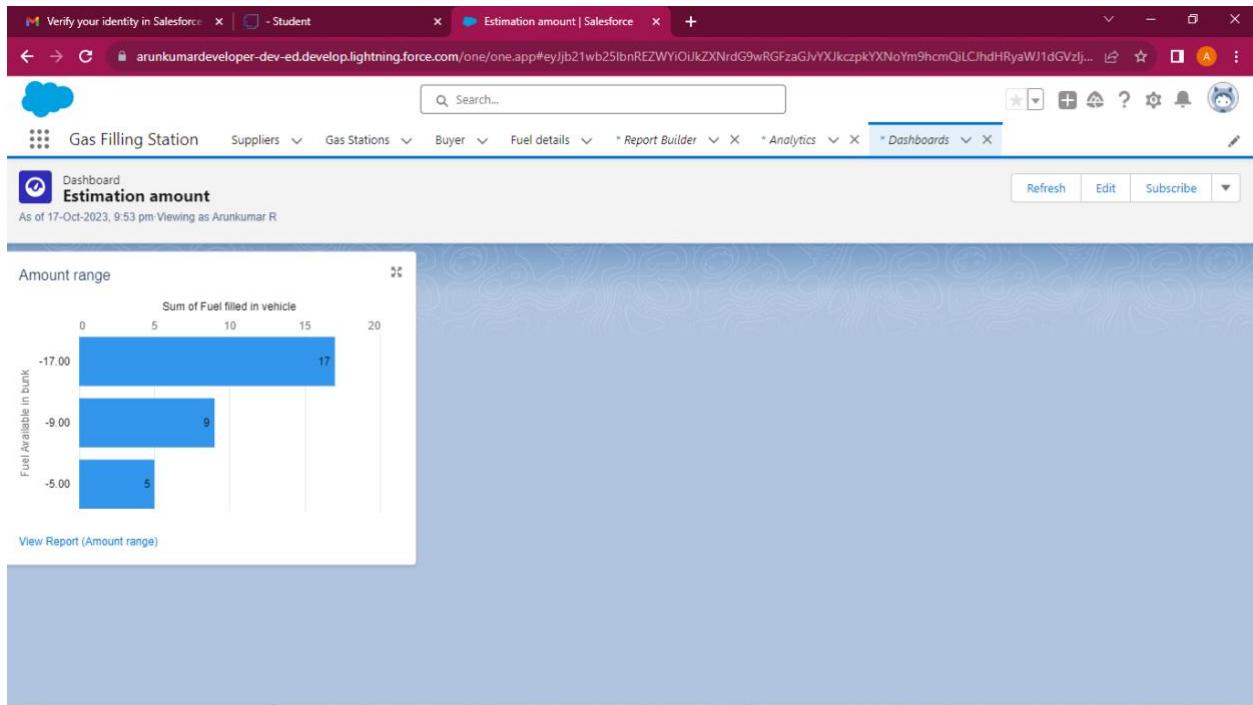
Gas Filling Station Suppliers Gas Stations Buyer Fuel details * Report Builder * Analytics * Dashboards

Estimation amount + Component + Filter ⚙️ Save Done

A large, empty grid with a light gray background, representing a data table or estimation grid. It consists of approximately 20 columns and 20 rows.







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/ajith617/Naan-Mudhalvan>

Demo Link:

[https://drive.google.com/file/d/1Wir5gzsZl6KFBRHXzIt6im1rlQ_0xSBF/view?
usp=drivesdk](https://drive.google.com/file/d/1Wir5gzsZl6KFBRHXzIt6im1rlQ_0xSBF/view?usp=drivesdk)