

# APPLICATION TO MAKE THE GAS FILLING STATION EASY USING CRM ( ADMIN )

By

**BANAVASI PRAKASH**

Email: [214g1a0135@srit.ac.in](mailto:214g1a0135@srit.ac.in)



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## PROJECT ABSTRACT

**Title: Application to Streamline Gas Filling Station Operations Using CRM (Admin)**

### Project Overview

The objective of this project is to develop a Customer Relationship Management (CRM) application to streamline the operations of gas filling stations. The application will integrate various aspects of gas station management, from supplier relationships to customer service, enabling a more efficient workflow. The admin will have a central role in managing users, stations, buyers, and fuel details. This CRM application will help gas station owners track fuel inventory, manage customer interactions, and improve decision-making processes. The system will be designed to cater to both the backend (administrative) and front-end (user) functionalities.

### Problem Statement

Gas filling stations often face challenges such as inefficient tracking of fuel supply, poor customer relationship management, and lack of real-time data insights. Managing fuel suppliers, keeping track of buyer interactions, and ensuring optimal service at gas stations are complex tasks that require coordination. Without an integrated system, gas stations often rely on manual processes, leading to potential errors, delays, and customer dissatisfaction. Therefore, the need for a CRM system tailored to the gas station industry becomes critical.

### Project Objectives

**Automate Fuel Supply Tracking:** Track fuel deliveries from suppliers to gas stations efficiently using real-time data.

**Customer Relationship Management:** Record, manage, and analyze buyer interactions to improve services.

**Streamline Operations:** Facilitate daily operations by providing an integrated view of suppliers, gas stations, and buyers.

**Role-Based Access Control:** Define specific roles (e.g., Sales Executive, Manager, Sales Person) for users with varying permissions for managing station activities.

**Enhanced Reporting:** Generate detailed reports for better decision-making by the admin regarding fuel supply, sales, and customer satisfaction.

## Key Features

**Supplier Management:** The system will allow admins to add and manage supplier details. Integration with suppliers will streamline the fuel supply chain, ensuring stations are stocked adequately.

**Gas Station Management:** Admins will have full control over gas station records, including station locations, available fuel types, and service details.

**Buyer Management:** Manage the database of buyers (customers), tracking their purchases, preferences, and interactions with the gas stations.

**Fuel Details Object:** A junction object to link suppliers and gas stations, capturing fuel transactions for efficient inventory management.

**Role-Based Profiles:** The system will allow the creation and management of different user roles (e.g., Sales Executive, Manager, Sales Person) with specific permissions for accessing and managing CRM records.

**Real-Time Inventory Monitoring:** Track fuel levels in gas stations in real-time to avoid shortages or overstocking.

## User Roles and Permissions

**Admin Role:** The admin will have full control over all modules, including the ability to create new users, define roles (e.g., Sales Executive, Sales Person), and manage permissions.

**Sales Executive Role:** Sales executives will handle buyer interactions, fuel sales, and inventory at the gas station level.

**Sales Person Role:** The sales person will focus on direct sales and customer interaction, ensuring that gas stations run smoothly.

## Technological Stack

**CRM Platform:** The application will be built using Salesforce CRM, leveraging its robust features for customer relationship management.

**Custom Objects:** The system will use Salesforce custom objects like Buyer, Supplier, Fuel Details, and Gas Station to manage data specific to the gas filling station industry.

**Automated Workflows:** Automation tools in Salesforce will trigger alerts for fuel

reorders and customer follow-ups, improving operational efficiency.

## Expected Benefits

**Improved Efficiency:** The CRM will reduce manual tracking efforts, improving the accuracy of fuel tracking, customer management, and supplier coordination.

**Better Customer Service:** By keeping track of customer preferences and transactions, gas stations can offer personalized service, fostering customer loyalty.

**Optimized Operations:** Real-time data on fuel availability and sales will allow gas stations to optimize their operations and decision-making processes.

**Scalability:** The system will be scalable, allowing new stations or suppliers to be added easily as the business grows.

Key features of the CRM application include:

**Customer Management:** Storing and managing detailed customer profiles, purchase history, and preferences.

**Service Scheduling:** Automating service appointments and reminders for regular maintenance.

**Inventory Control:** Monitoring fuel levels, tracking supplies, and managing orders to ensure uninterrupted service.

**Billing and Invoicing:** Streamlining the billing process with automated invoice generation and payment tracking.

**Reporting and Analytics:** Generating insightful reports on sales, customer behavior and operational metrics to aid in strategic planning.

In summary, this CRM solution will revolutionize the way gas filling stations are managed, providing an integrated platform for monitoring fuel supply, managing buyers, and improving overall station efficiency. The admin will play a pivotal role in ensuring smooth operations, supported by a structured and user-friendly system.

## INTRODUCTION

A CRM-based application for managing a gas filling station can streamline the overall operations and improve customer experience. The CRM can help automate key tasks, improve communication, track customer interactions, and manage inventory efficiently.

### **Customer Management:**

Customer Profiles: Store customer details (name, contact info, purchase history).

Loyalty Programs: Track regular customers and offer discounts or rewards.

Communication: Automated SMS or email notifications for reminders (next refill, promotions, etc.).

### **Order & Refill Management:**

Order Tracking: Log orders with status updates (pending, in-progress, completed).

Refill Scheduling: Schedule gas refills and assign them to available technicians.

Inventory Alerts: Notify when gas levels are low and need restocking.

### **Inventory & Asset Management:**

Inventory Tracking: Monitor gas stock in real time, including cylinder levels and tank capacity.

Asset Maintenance: Log maintenance schedules for gas equipment (cylinders, pumps, etc.) and notify when service is due.

### **Billing & Invoicing:**

Automated Invoicing: Generate and send invoices for gas purchases automatically.

Payment Tracking: Record payments and notify customers of outstanding bills.

### **Reports & Analytics:**

Sales Analysis: Generate reports on daily, weekly, or monthly gas sales.

Inventory Reports: Get reports on inventory levels to avoid stock outs.

### **Safety & Compliance:**

Compliance Tracking: Ensure compliance with government regulations and maintain necessary documentation.

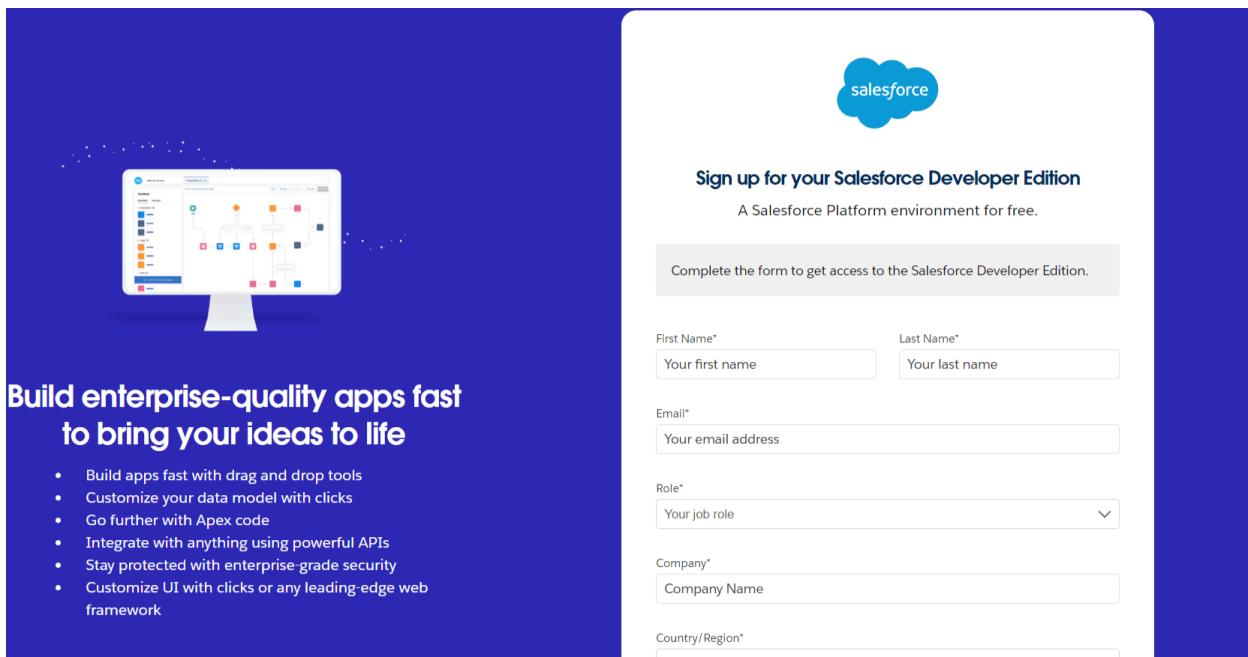
Safety Alerts: Notify staff and customers of safety measures and maintenance checks.

By using a CRM system, the gas filling station can streamline operations, improve customer satisfaction, and ensure compliance with safety standards.

## Setup Guide

### 1. Creating a Salesforce Developer Account:

1. Visit [Salesforce Developer Signup](#).



1. Fill out the signup form:
  - a. First Name & Last Name
  - b. Email
  - c. Role: Developer
  - d. Company: College Name
  - e. Country: India
  - f. Postal Code: Your Pin Code
  - a. Username: (e.g., [username@organization.com](#))

### 2. Account Activation

1. Check your email inbox for a verification email from Salesforce.

2. Click Verify Account.
3. Set up your password and security question, then click Change Password.

## 1. Creating Salesforce Objects

### What Is an Object?

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

#### 3.1 Supplier Object

1. Go to Object Manager > Create > Custom Object.
2. Configure the following:
  - a. Label Name: Supplier
  - b. Plural Label Name: Suppliers
  - c. Record Name: Supplier Name (Text)
3. Enable Allow Reports, Track Field History, and Allow Search.
4. Click Save.

#### 3.2 Gas Station Object

1. Go to Object Manager > Create > Custom Object.
2. Configure the following:
  - a. Label Name: Gas Station
  - b. Plural Label Name: Gas Stations
  - c. Record Name: Gas Station (Auto Number)
  - d. Display Format: Gas-{000}, Starting Number: 1
3. Enable Allow Reports, Track Field History, and Allow Search.
4. Click Save.

#### 3.3 Buyer and Fuel Details Objects

##### 3.3.1 Buyer Object

1. Go to Object Manager > Create > Custom Object.
2. Configure the following:
  - a. Label Name: Buyer
  - b. Plural Label Name: Buyers

- c. Display Format: Buyer-{000}, Starting Number: 1

### 3.3.2 Fuel Details Object

1. Go to Object Manager > Create > Custom Object.
2. Configure the following:
  - a. Label Name: Fuel details
  - b. Plural Label Name: Fuel details
  - c. Display Format: fuel-{000}, Starting Number: 1

## 4. Creating Custom Tabs

### What is Tab:

A tab is like a user interface that is used to build records for objects and to view the records in the objects

1. Go to Setup > Tabs > New (under Custom Object Tabs).
2. Select the object (e.g., Supplier), choose a tab style, and click Next.
3. Configure profile visibility as needed and click Next.
4. uncheck the include tab.
5. Make sure that the Append tab to users' existing personal customizations is checked.
6. Click Save.

Repeat for remaining objects (Gas station, Buyer, Fuel details)

## 5. Creating a Lightning App

1. Go to Setup > App Manager > New Lightning App.
2. Configure the app:
  - a. App Name: GAS STATION
  - b. Leave other settings as default and click Next.
3. Add navigation items (Supplier, Gas Station, Buyer, Receipt) and click Next.
4. Assign the System Administrator profile to the app and click Save & Finish.

## 6. Creating Fields for Objects

### 6.1 Junction Object

#### **Fuel details with Supplier**

1. Go to Setup > Object Manager > Fuel details > Fields & Relationships > New.
2. Select Master-Detail Relationship > Next
  - a. Object: Supplier
  - b. Field label: Supplier Name
  - c. Leave other settings as default and click Next.
  - d. Click Save & New.

#### **Fuel details with Gas Station**

1. Go to Setup > Object Manager > Fuel details > Fields & Relationships > New.
2. Select Master-Detail Relationship > Next
  - a. Object: Gas station
  - b. Field label: Gas Station
  - c. Leave other settings as default and click Next.
  - d. Click Save.

### 6.2 Master-Detail Relationship

#### **Relationship between Buyer & Gas Station Object**

1. Go to Setup > Object Manager > Buyer > Fields & Relationships > New.
2. Select Master-Detail Relationship > Next
  - a. Object: Gas station
  - b. Field label: Gas Station Name
  - c. Leave other settings as default and click Next.
  - d. Click Save

### 6.3 Number field in Fuel Details & Buyer Objects

## Number field in Fuel Details Object

1. Go to Setup > Object Manager > Fuel details > Fields & Relationships > New.
2. Select Number > Next
  - a. Field label: Fuel Supplied
  - b. Length: 5
  - c. Field Name will be auto populated.
  - d. Leave other settings as default and click Next.
  - e. Click Save.

## Number field in Buyer Object

1. Go to Setup > Object Manager > Buyer > Fields & Relationships > New.
2. Select Number > Next
  - a. Field label: Fuel filled in vehicle
  - b. Length: 5
  - c. Field Name will be auto populated.
  - d. Leave other settings as default and click Next.
  - e. Click Save.

## 6.4 Creating Roll-Up Summary

### Roll-up summary field on Supplier Object

1. Go to Setup > Object Manager > Supplier > Fields & Relationships > New.
2. Select Roll Up Summary > Next
  - a. Field label: Fuel Supplied
  - b. Field Name will be auto populated > Next
  - c. Summarized Object: Fuel Details
  - a. Roll type: Sum
  - b. Field to aggregate: Fuel Supplied
  - c. Leave other settings as default and click Next
  - d. Click Save.

## **Roll-up summary field on Gas Station Object**

1. Go to Setup > Object Manager > Gas station > Fields & Relationships > New.
2. Select Roll Up Summary > Next
  - a. Field label: Fuel supplied to bunk
  - b. Field Name will be auto populated > Next
  - c. Summarized Object: Fuel Details
  - d. Roll type: Sum
  - e. Field to aggregate: Fuel Supplied
  - f. Leave other settings as default and click Next
  - g. Click Save.

## **Roll-up summary field on Gas Station Object**

1. Go to Setup > Object Manager > Gas station > Fields & Relationships > New.
2. Select Roll Up Summary > Next
  - a. Field label: Fuel used
  - b. Field Name will be auto populated > Next
  - c. Summarized Object: Buyer
  - d. Roll type: Sum
  - e. Field to aggregate: Fuel filled in vehicle
  - f. Leave other settings as default and click Next.
  - g. Click Save.

## **6.5 Creating Formula field in Gas Station Object**

### **Field for Gas Station Object**

1. Go to Setup > Object Manager > Gas station > Fields & Relationships > New.

2. Select Formula > Next
  - a. Field label: Fuel Available in Bunk
  - b. Field Name: Fuel Available in Bunk
  - c. Formula return type: Number > Next
  - d. Under Advanced Formula
  - e. Insert field formula : Fuel\_supplied\_to\_bunk\_\_c - Fuel\_Used\_\_c
  - f. Click "Check Syntax"
  - g. Click Save.

### Field for Buyer Object

1. Go to Setup > Object Manager > Buyer > Fields & Relationships > New.
2. Select Formula > Next
  - a. Field label: Customer Name
  - b. Field Name: Customer Name
  - c. Formula return type: Text > Next
  - d. Under Advanced Formula
    - a. Insert field formula : First\_Name\_\_c + ' ' + Last\_Name\_\_c
    - b. Click "Check Syntax"
    - c. Click Save.

### 6.6 Creating Cross Object Formula Field in Buyer Object

1. Go to Setup > Object Manager > Buyer > Fields & Relationships > New.
2. Select Formula > Next
  - a. Field label: Amount Paid
  - b. Field Name: Amount Paid
  - c. Formula return type: Number > Next
  - d. Under Advanced Formula
  - e. Insert field formula :  
Fuel\_filled\_in\_vehicle\_\_c \* Gas\_Station\_name\_\_r.Fuel\_price\_liter\_\_c
  - f. Click "Check Syntax"
  - g. Click Save.

## 6.7 Creating Picklist field in Buyer Object

1. Go to Setup > Object Manager > Buyer > Fields & Relationships > New.

2. Select Picklist > Next

a. Field label: Vehicle type

b. Under Values > "Enter values, with each value separated by a new line"

The values are: two-wheeler, three-wheeler, four-wheeler, six-wheeler,wheeler and

Others.

a. click Next.

b. Leave other settings as default and click Next.

c. Click Save & New.

1. Go to Setup > Object Manager > Buyer > Fields & Relationships > New.

2. Select Picklist > Next

a. Field label: Mode of Payment

b. Under Values > "Enter values, with each value separated by a new line"

The values are: credit card, net banking,upi, cash. click Next.

a. Leave other settings as default and click Next.

b. Click Save & New.

## 6.8 Creating The Validation Rule

1. Go to Setup > Object Manager > Buyer

2. Select Validation Rule > New

a. Rule Name: Phone

b. Insert the Error Condition Formula as :-

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

c. Error Message: incorrect data

d. Error Location: Field > Select "Phone Number"

a. Click Save.

## 6.9 Creating Remaining Fields in Buyer Object

| Field Name    | Data Type |
|---------------|-----------|
| First Name    | Text      |
| Last Name     | Text      |
| Customer Name | Formula   |
| Phone Number  | phone     |
| email         | email     |

## 7. Creating The Page Layouts

1. Go to Setup > Object Manager > Buyer > Page Layouts > New.
2. Select the existing page layout
3. page layout name: “Customer layout” > click save.

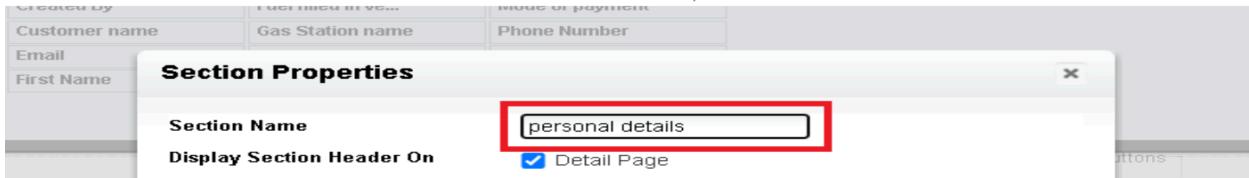
Create New Page Layout

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: custom\_page  
Page Layout Name: customer layout

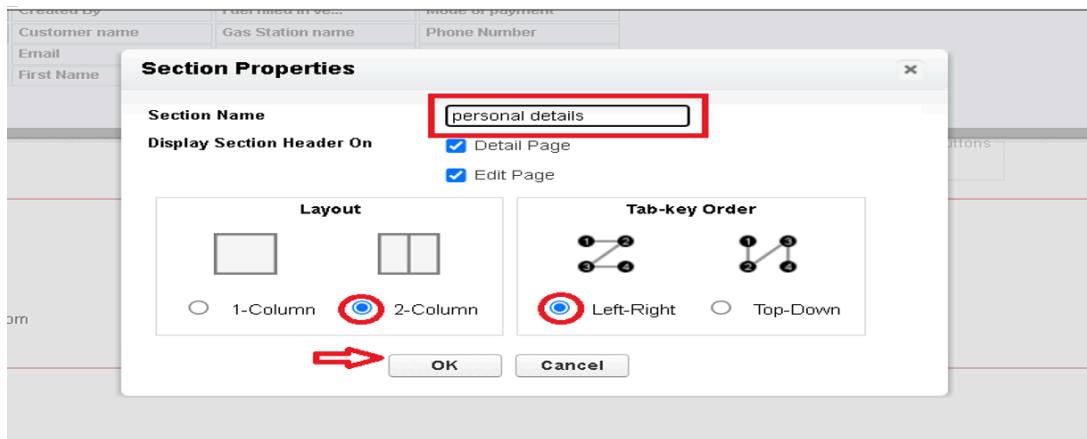
Save Cancel

4. Drag and drop the section field to Buyer details and create the section.
5. Enter the section name as “Persoanl details”, ? click Ok.



1. section field: Buyer details > create the section.
2. section name: “Personal details” > click Ok.

## APPLICATION TO MAKE THE GAS FILLING STATION EASY USING CRM ( ADMIN )



1. Drag the fields to this section that is mentioned; they are
2. First name, last name, customer name, phone number, email, Gas station name.
3. Follow the same process for another two sections as shown above; they are
4. One section is “ vehicle info ”; drag the fields that are Fuel filled in the vehicle,
5. vehicle type.
6. Another section is “Receipt details ”, and drag the fields that are Mode of payment,Amount paid.
7. Click save.

| Section       | Created By | Fuel filled in ve... | Mode of payment |
|---------------|------------|----------------------|-----------------|
| Customer name |            | Gas Station name     | Phone Number    |
| Email         |            | Last Modified By     | Vehicle type    |
| 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

**Vehicle Info**

- Fuel filled in vehicle: 79.937
- Vehicle type: Sample Text

**Receipt details**

- Mode of payment: Sample Text
- Amount Paid: ₹123.45

## 8. Profiles

### 8.1 Manager Profile

1. Go to Setup > in the search bar, type profiles > click on profile > clone the desired profile (Standard User)
  - a. Profile name: Manager > Save.
2. In profile page > Edit

The screenshot shows the 'Profile Manager' page for the 'Manager' profile. At the top, there's a list of permissions: Login IP Ranges (0), Enabled Apex Class Access (0), Enabled Visualforce Page Access (0), Enabled External Data Source Access (0), Enabled Named Credential Access (0), Enabled External Credential Principal Access (0), Enabled Custom Metadata Type Access (0), Enabled Custom Setting Definitions Access (0), Enabled Flow Access (0), Enabled Service Presence Status Access (0), and Enabled Custom Permissions (0). Below this is the 'Profile Detail' section with fields for Name (Manager), User License (Salesforce), Description, Created By (sunny\_1, 13/06/2023, 2:40 pm), Modified By (sunny\_1, 13/06/2023, 2:40 pm), and a 'Custom Profile' checkbox which is checked. At the bottom of the detail section are buttons for Edit (highlighted with a red box), Clone, Delete, and View Users.

3. Select the Custom App settings as default for the "Gas station".

The screenshot shows the 'Custom App Settings' section. It lists four apps: Analytics Studio (standard\_Insights), App Launcher (standard\_AppLauncher), Gas Station (Gas\_Station), and Platform (standard\_Platform). For each app, there are 'Visible' and 'Default' columns. The 'Gas Station (Gas\_Station)' row has its 'Default' column highlighted with a red box and a red arrow pointing to it.

|                                      | Visible                             | Default | Visible                      | Default                             |   |
|--------------------------------------|-------------------------------------|---------|------------------------------|-------------------------------------|---|
| Analytics Studio (standard_Insights) | <input type="checkbox"/>            | 0       | Platform (standard_Platform) | <input checked="" type="checkbox"/> | 0 |
| App Launcher (standard_AppLauncher)  | <input type="checkbox"/>            | 0       | WDC (standard_Work)          | <input type="checkbox"/>            | 0 |
| Gas Station (Gas_Station)            | <input checked="" type="checkbox"/> | 0       |                              |                                     |   |

1. Scroll down to Custom Object Permissions
2. Give access permissions for Buyers, Fuel details, gas station and supplier objects
1. Change the session times out after should be “ 8 hours of inactivity”.
2. Change the password policies as mentioned :
3. User passwords expire in should be “ never expires ”.
4. Minimum password length should be “ 8 ” > Click Save.

## **APPLICATION TO MAKE THE GAS FILLING STATION EASY USING CRM ( ADMIN )**

|              |  | Basic Access                        |                                     |                                     | Data Administration                 |                                     |                                     |
|--------------|--|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
|              |  | Read                                | Create                              | Edit                                | Delete                              | View All                            | Modify All                          |
| Buyers       |  | <input checked="" type="checkbox"/> |
|              |  | <input checked="" type="checkbox"/> |
| Fuel details |  | <input checked="" type="checkbox"/> |
|              |  | <input checked="" type="checkbox"/> |
|              |  | Basic Access                        |                                     |                                     | Data Administration                 |                                     |                                     |
|              |  | Read                                | Create                              | Edit                                | Delete                              | View All                            | Modify All                          |
| Gas Stations |  | <input checked="" type="checkbox"/> |
|              |  | <input checked="" type="checkbox"/> |
| Suppliers    |  | <input checked="" type="checkbox"/> |
|              |  | <input checked="" type="checkbox"/> |

**Session Settings**

Session Times Out After  [ ]

Session Security Level Required at Login  [ ]

**Password Policies**

User passwords expire in  [ ] ←

Enforce password history

Minimum password length  [ ] ←

Password complexity requirement

Password question requirement

Maximum invalid login attempts

Lockout effective period

Obscure secret answer for password

## **8.2 Sales Executive Profile**

1. Go to setup > in the search bar, type profiles > click on profile > clone the desired profile (Salesforce Platform User)Profile name: sales executive > Save.
  2. In the profile page > click Edit.
  3. Select the Custom App settings as default for the Gas station.
  4. Scroll down to Custom Object Permissions
  5. Give access permissions for Buyers, Fuel details, gas station and supplier objects
  6. Click Save.

| Custom Object Permissions |                                     |                          |                                     |                          |                          |                          |  |  |  |
|---------------------------|-------------------------------------|--------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|--|--|--|
|                           | Basic Access                        |                          |                                     |                          |                          | Data Administration      |  |  |  |
|                           | Read                                | Create                   | Edit                                | Delete                   | View All                 | Modify All               |  |  |  |
|                           | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |  |  |  |
| Buyers                    | <input checked="" 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"/> |  |  |  |
| Suppliers                 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |  |  |  |

## **8.3 Sales Person Profile**

1. Go to setup > in the search bar, type profiles > click on profile > clone the desired profile (Salesforce Platform User)  
Profile name: sales person> Save.
  2. In the profile page > click Edit.
  3. Select the Custom App settings as default for the Gas station.
  4. Scroll down to Custom Object Permissions
  5. Give access permissions for Buyers, Fuel details, gas station and supplier objects
  6. Click Save.

## 9. Creating Role & Role Hierarchy

### 9.1 Creating Manager Role

1. Go to setup > search for Roles > click on set up Roles
2. Click on Expand All > click on add role under whom this role works.
  - a. Label: Manager
  - b. Role name generates itself.
  - c. Click Save.



### 9.2 Creating Another Roles Under Manager Role

1. Go to setup > search for Roles > click on set up Roles
2. Click plus on the CEO role. Click add role under manager.



- a. Label: sales executive
- b. Role name generates itself > Click Save.
3. Repeat the same steps for another role

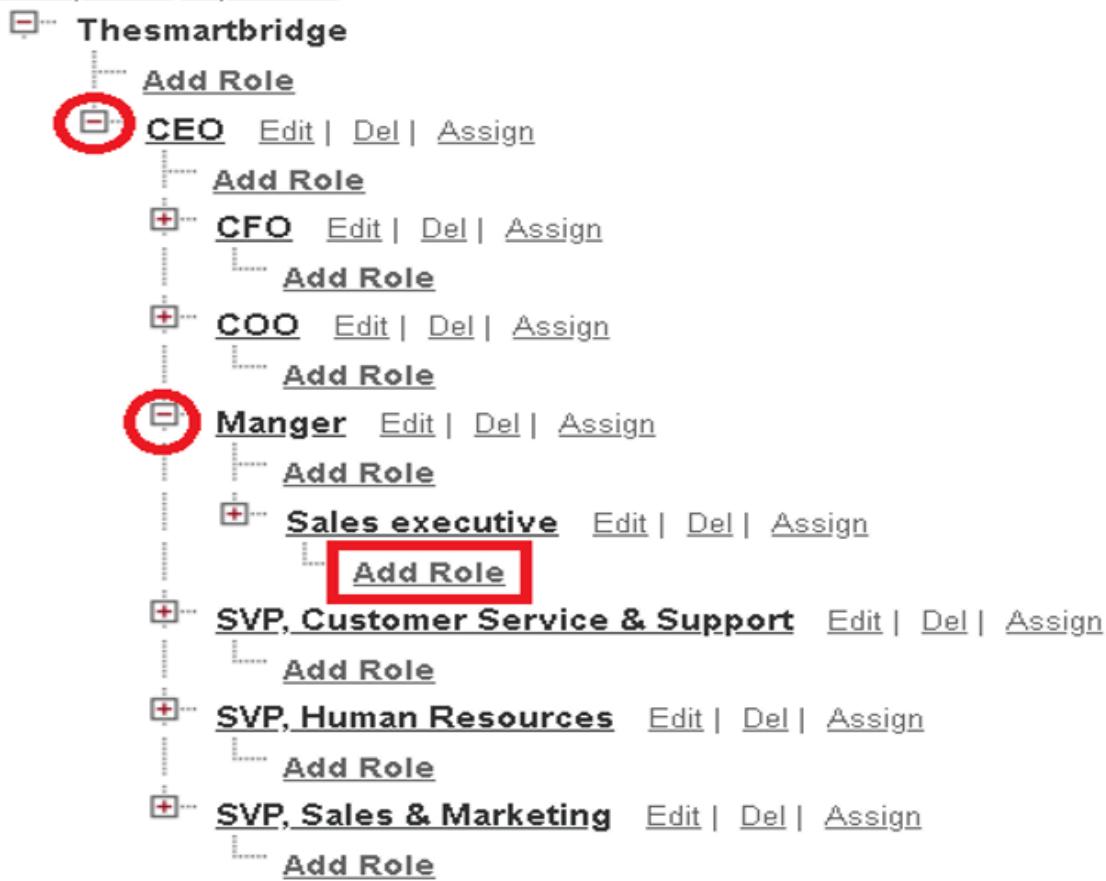
4. Click plus on CEO Role > Click plus on manager
5. Click add role under sales executive

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### Your Organization's Role Hierarchy

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[Collapse All](#) [Expand All](#)



- a. Label: sales person
- b. Role name generates itself > Click Save.

## 10. Creation Of Users

### 10.1 Creating a user

1. Go to setup > in the search bar type users > select users > New user
  - a. First Name : Niklaus
  - b. Last Name : Mikaelson
  - c. Alias : Give an Alias Name
  - d. Email id : Give your Personal Email id
  - e. Username : Username should be in this form: text@text.text
  - f. Nick Name : Give a Nickname
  - g. Role : Manager
  - h. User license : Salesforce
  - i. Profiles : Manager
2. Click Save.

New User

User Edit

Save Save & New Cancel

General Information

First Name: Niklaus  
Last Name: Mikaelson  
Alias: nmika  
Email:  
Username: Mikaelson@Niklaus  
Nickname: nik

Required Information

Role: Manager  
User License: Salesforce  
Profile: Manager  
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--

### 10.2 Creating Another user

1. Follow the same steps from the above activity and create another user using
  - a. Role : sales executive
  - b. User licence : Salesforce Platform
  - c. Profile : sales executive
2. Repeat the steps and create another user using
  - a. Role : sales person
  - b. User licence : Salesforce Platform
  - c. Profile : sales person

## 11. Creating Permission Sets

1. Go to setup > type permission sets > select permission sets > New
  - a. Label Name: P1
  - b. API will be auto populated > Save.
2. In the profile page > click Edit.
3. Under Apps > Select "Object Settings".

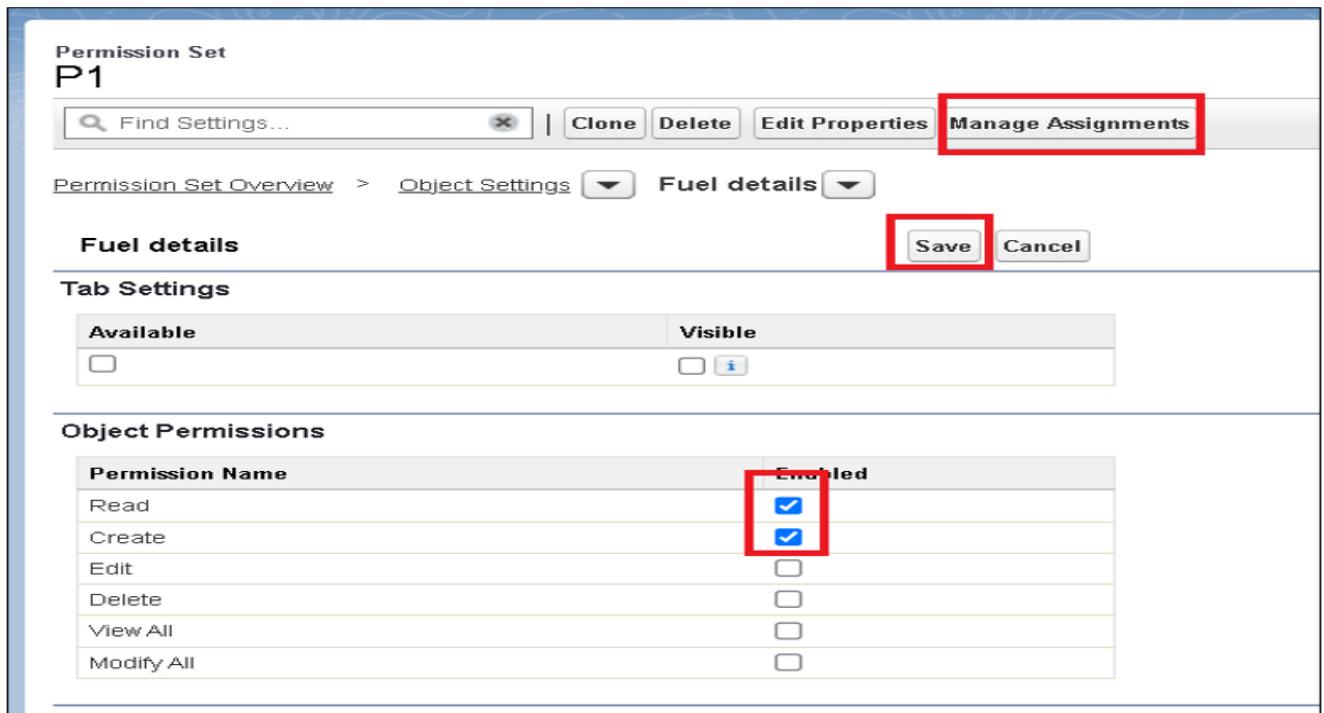
The screenshot shows the 'Object Settings' section of a permission set configuration. The section is highlighted with a red box. It contains a list of permissions:

- 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. This item is highlighted with a red box.
- App Permissions**: Permissions to perform app-specific actions, such as "Manage Call Centers".
- Apex Class Access**: Permissions to execute Apex classes.
- Visualforce Page Access**: Permissions to execute Visualforce pages.
- External Data Source Access**: Permissions to authenticate against external data sources.
- Flow Access**: Permissions to execute Flows.
- Named Credential Access**: Permissions to authenticate against named credentials.
- Custom Permissions**: Permissions to access custom processes and apps.
- Custom Metadata Types**: Permissions to access custom metadata types.
- Custom Setting Definitions**: Permissions to access custom settings.

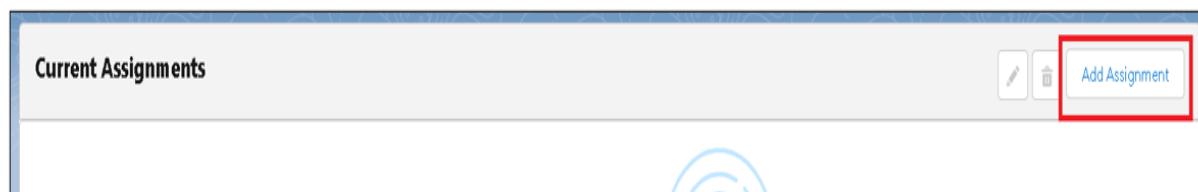
Below the list, there is a note: "Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform" and a "Learn More" link.

4. Click on Fuel details object > click on Edit > under object permission > check for read and create.
5. Click Save.

APPLICATION TO MAKE THE GAS FILLING STATION EASY USING CRM ( ADMIN )



6. After saving the permission, click on the Manage assignment
7. Now click on the Add Assignment.



8. Now select the users which you have created in user milestone, using sales executive profile > click on Next > Assign > Done.

## APPLICATION TO MAKE THE GAS FILLING STATION EASY USING CRM ( ADMIN )

**All Users**

1 item selected

| Full Name ↑                               | Alias   | Username  | Role                                | Active                              | Profile                   |
|---|---------|---|-------------------------------------|-------------------------------------|---------------------------|
| <input checked="" type="checkbox"/> abd c | ac      | ab@cd1.com  | Sales executive                     | <input checked="" type="checkbox"/> | sales executive           |
| <input type="checkbox"/> Astro Nomical    | anomi   | astronomicalsecurity2vhahccrdajujh67mibr0rqsab1dhzd@smart.com | <input type="checkbox"/>            | <input type="checkbox"/>            | Force.com - Free User     |
| <input type="checkbox"/> Brochan Pane     | bpane   | bpane.kh061622.rvopq5ltd9yi.cwkqyhudbsxb@smart.com            | <input type="checkbox"/>            | <input type="checkbox"/>            | Break Glass Administrator |
| <input type="checkbox"/> Chatter Expert   | Chatter | chatty.00d5i00000dpzofeadnb26j1owcvnq@chatter.salesforce.com  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Chatter Free User         |
| <input type="checkbox"/> Cirrus Cash Flow | cirr    | cirrus@cashflow.com   | <input type="checkbox"/>            | <input type="checkbox"/>            | System Administrator      |

Select an Expiration Option For Assigned Users

No expiration date (1)

Specify the expiration date

1 Day  1 Week  30 Days  60 Days  Custom Date

Time Zone

**Selected Users**

| Full Name | Role | Profile | Active | User License | Expires On |
|-----------|------|---------|--------|--------------|------------|
|           |      |         |        |              |            |

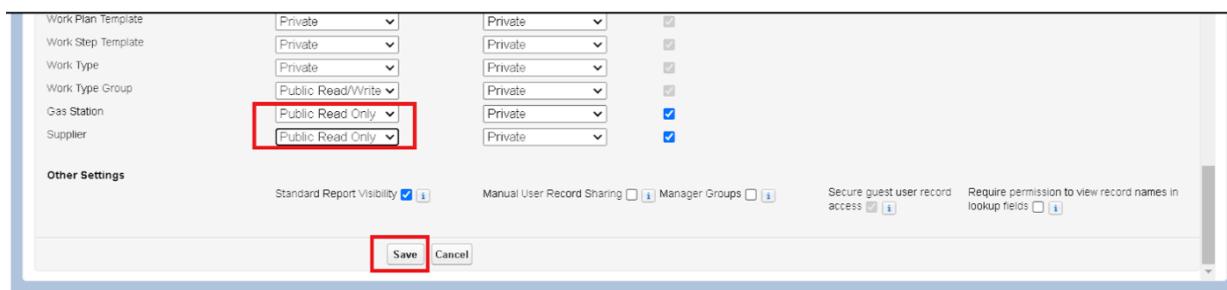
## 12. Setup for OWD

### Create OWD settings

1. Go to setup > type sharing settings > click edit.
2. Scroll down, change the default internal access to “public read-only” for Gas station and

### Supplier object.

#### 3. Click Save.

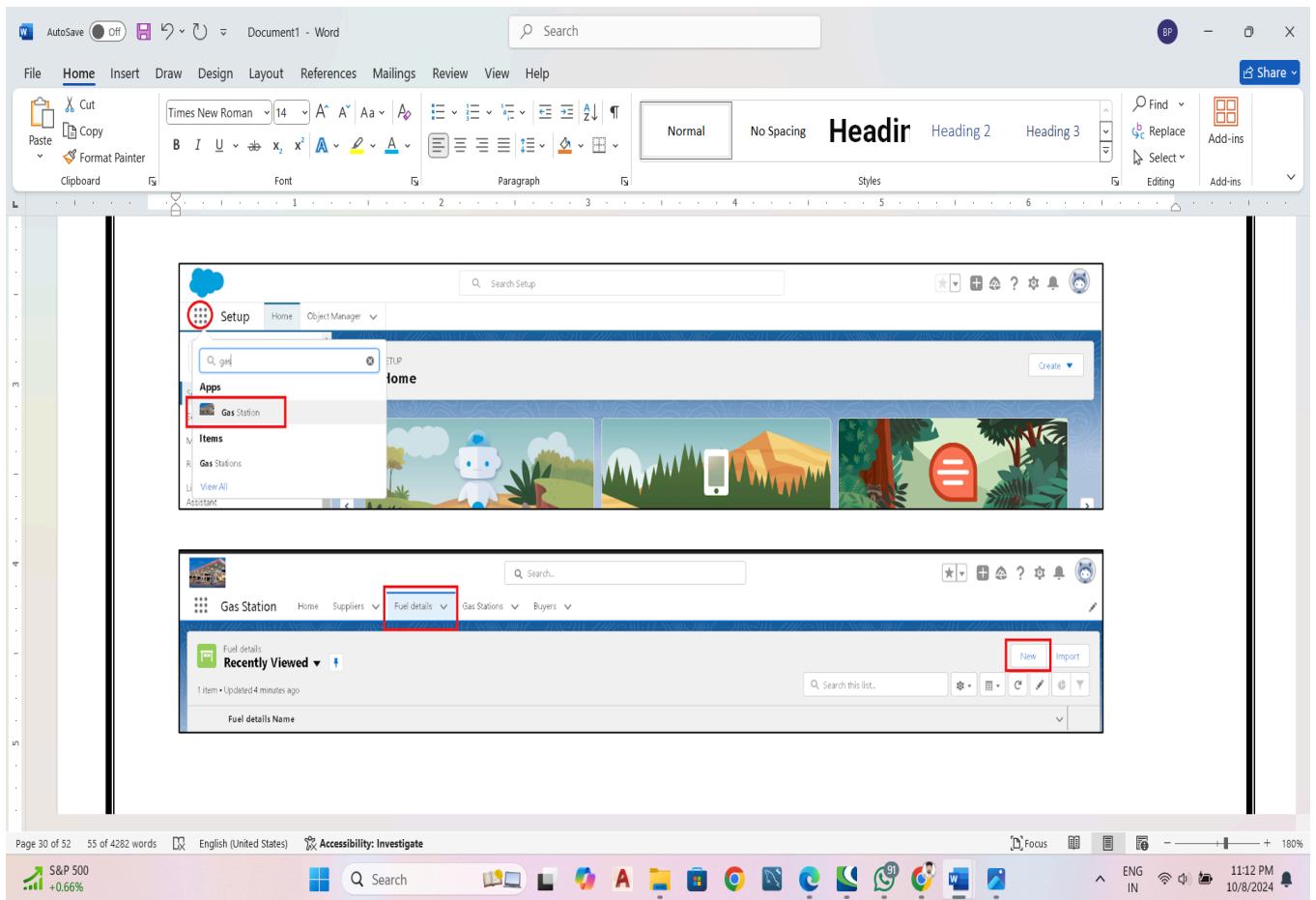


4. Extra information: By these, every profile has their own access, according to them profile.
5. But in our case, we created a role and given the roles in such a way that the manager can see sales executive and sales person records; the sales executive can see the sales person records.

## 13. User Adoption

### 13.1 Create a Record

1. Click on the app launcher located at the left side of the screen.
2. Search for “ Gas station ” > click on it.
3. Click on the “ fuel details tab ”.
4. Click on new and fill out the details as shown below figs > click save.



1. Creating the supplier record in the fuel detail record by clicking the “ new supplier ”.

## APPLICATION TO MAKE THE GAS FILLING STATION EASY USING CRM ( ADMIN )

New Fuel details

\* = Required Information

**Information**

Fuel details Name

\*Supplier name

Search Suppliers...

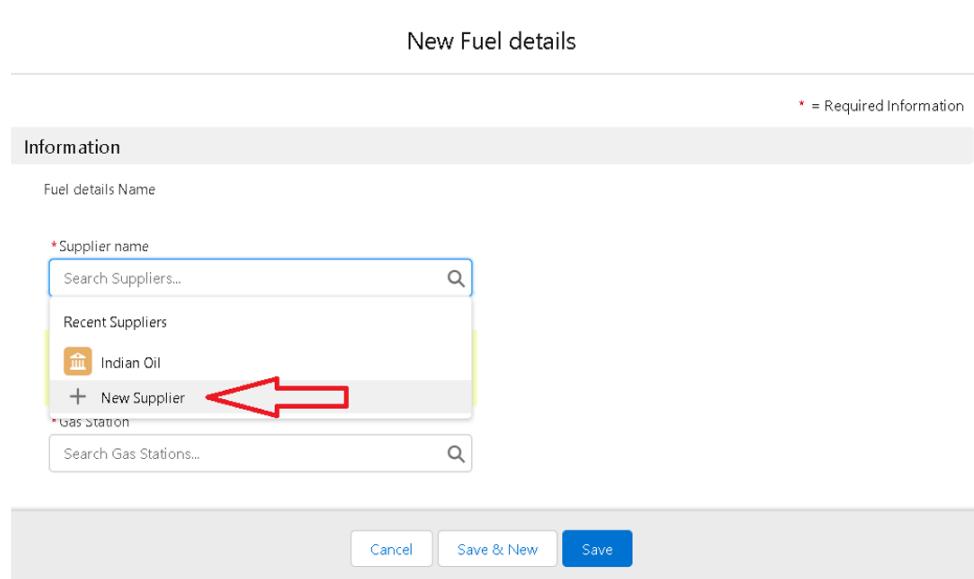
Recent Suppliers

 Indian Oil

+ New Supplier 

\*Gas Station

Search Gas Stations...



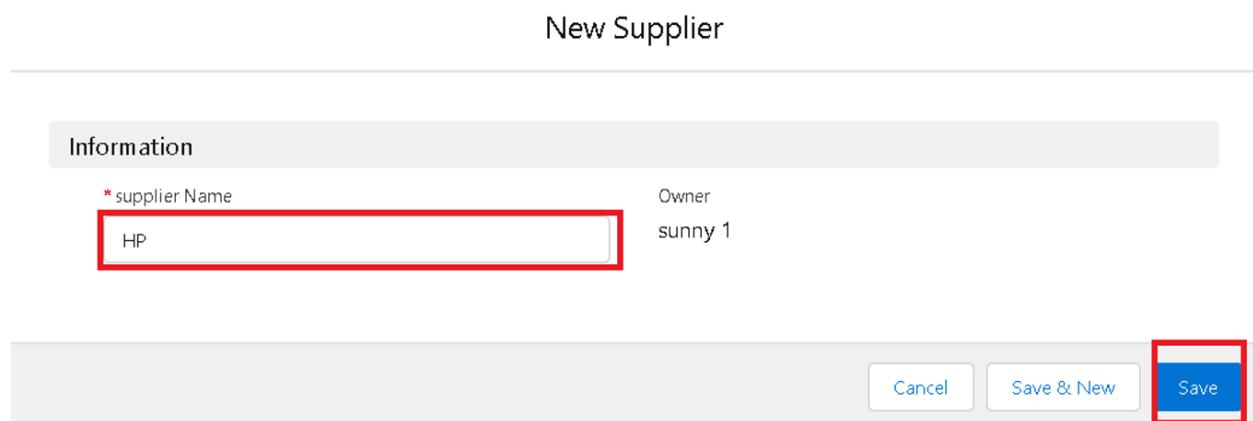
6. Fill out the details in the supplier record > Click Save.

New Supplier

**Information**

\* supplier Name  

Owner



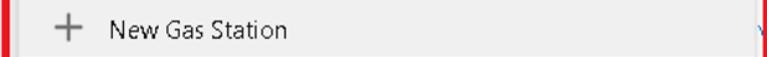
7. Creating the Gas station record in the fuel details record by clicking on a new gas station.

\* Gas Station

Search Gas Stations...

Recent Gas Stations

 Gas-001

+ New Gas Station 



8. Fill out the details in the gas station record > Click Save.

## APPLICATION TO MAKE THE GAS FILLING STATION EASY USING CRM ( ADMIN )

New Gas Station

---

**Information**

|                  |       |
|------------------|-------|
| Gas Station Name | Owner |
| sunny 1          |       |
| Fuel price/liter |       |
| 116              |       |

---

[Cancel](#) [Save & New](#) **Save**

9. Fill out the remaining details in the fuel detail record > Click Save.

New Gas Station

---

**Information**

|                  |       |
|------------------|-------|
| Gas Station Name | Owner |
| sunny 1          |       |
| Fuel price/liter |       |
| 116              |       |

---

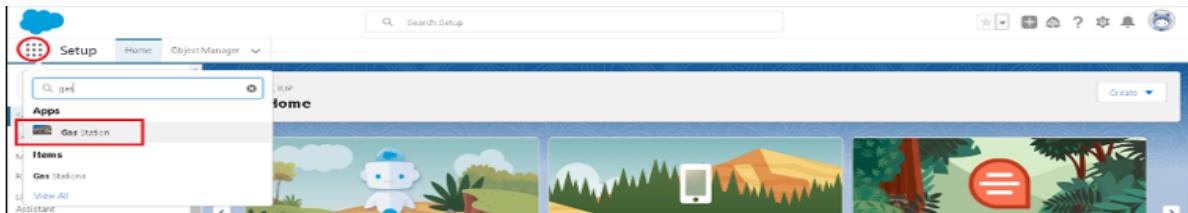
[Cancel](#) [Save & New](#) **Save**

10. Followed by these, create 10 more records in Buyer object.

### 13.2 View a Record

1. Click on the app launcher located at the left side of the screen.
2. Search for “ Gas station” > click on it.
3. Click on the “ fuel details tab”.
4. Click on the records that are already created.

## APPLICATION TO MAKE THE GAS FILLING STATION EASY USING CRM ( ADMIN )

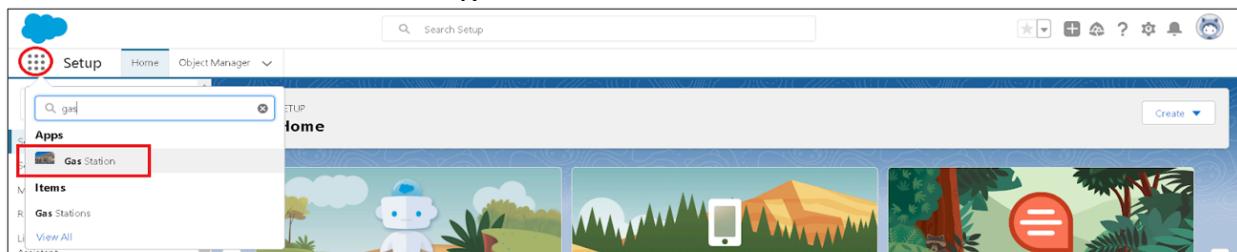
A screenshot of a Salesforce record detail page for 'Fuel details'. The top navigation bar shows 'Related' and 'Details' tabs, with 'Details' being the active tab. The main content area displays the following fields:

- Fuel details Name: Fuel-002
- Supplier name: HP
- Fuel supplied: 80,000
- Gas Station: Gas-002

- 
- A screenshot of the 'Fuel details' list view. The top navigation bar shows 'Gas Station', 'Home', 'Suppliers', and 'Fuel details' (which is highlighted and circled in red). Below the navigation is a 'Recently Viewed' section with two items: 'Fuel-002' and 'Fuel-001'. The main content area shows a table with columns for 'Fuel details Name' and 'Actions'.

### 13.3 Delete a Record

1. Click on the app launcher located at the left side of the screen.
2. Search for “ Gas station ” > click on it.
3. Click on the “ fuel details tab ”.
4. Click on the Arrow at the right-hand side on that Particular record.
5. Click delete and delete again.

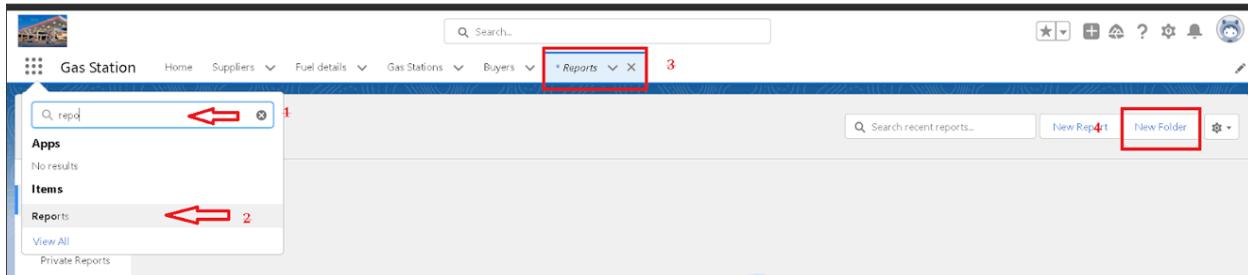


- 
- A screenshot of the 'Fuel details' list view. The top navigation bar shows 'Gas Station', 'Home', 'Suppliers', and 'Fuel details' (highlighted and circled in red). The main content area shows a table with two items: 'Fuel-002' and 'Fuel-001'. In the bottom right corner of the list view, there is a red arrow pointing to the 'Delete' button in the 'Actions' column for the second record.

## 14. Reports

### 14.1 Create a Report Folder

1. Click on the app launcher > search for reports.
2. Double click on the report > “ reports tab” will be auto populated in the navigation bar.
3. Click on the report tab > click on a new folder.



- a. Folder label: Fuel Estimation
- b. Folder unique name will be auto populated.
- c. Click Save.

### 14.2 Sharing a Report Folder

1. Go to the app > click on the reports tab.
2. Click on the All folder > click on the arrow for the Fuel estimation folder.
3. Click on share.
  - a. Share with: roles
  - b. name: manager (search for field)
  - c. Access: view
4. Click share > Click Done.

## APPLICATION TO MAKE THE GAS FILLING STATION EASY USING CRM ( ADMIN )

Gas Station Home Suppliers Fuel details Gas Stations Buyers Reports X 4

Reports All Folders 5 items

| REPORTS         | Name                            | Created By        | Created On          | Last Modified By  | Last Modified Date  |
|-----------------|---------------------------------|-------------------|---------------------|-------------------|---------------------|
| Recent          | Einstein Bot Reports            | Automated Process | 16/5/2023, 8:59 am  | Automated Process | 16/5/2023, 8:59 am  |
| Created by Me   | Einstein Bot Reports Summer '23 | Automated Process | 11/6/2023, 6:08 am  | Automated Process | 11/6/2023, 6:08 am  |
| Private Reports | Einstein Bot Reports Summer '22 | Automated Process | 16/5/2023, 8:59 am  | Automated Process | 16/5/2023, 8:59 am  |
| Public Reports  | Einstein Bot Reports Winter '23 | Automated Process | 16/5/2023, 8:59 am  | Automated Process | 16/5/2023, 8:59 am  |
| All Reports     | Fuel Estimation                 | sunny 1           | 15/6/2023, 10:22 am | sunny 1           | 15/6/2023, 10:22 am |

**FOLDERS**

- All Folders 2
- Created by Me
- Shared with Me

**FAVORITES**

- All Favorites

3 4

Favorite Share Rename Delete

Share folder

These sharing settings apply to all subfolders in this folder.

Share With

Roles 4

Names

Search Roles... 2

Access

View 3

Share 4

Who Can Access

Manage

Done 5

## 14.3 Create Report

Note : Before creating report, create latest “10” records in buyer object.

1. Go to the app > click on the reports tab
2. Click New Report.

The screenshot shows the Microsoft Dynamics 365 interface. At the top, there's a navigation bar with icons for Home, Employees, Assets, Asset Services, Projects, ProjectTasks, Reports (which is highlighted with a red box), and Dashboards. Below the navigation bar is a search bar labeled 'Search...'. The main content area is titled 'Reports' and has a sub-section 'Recent' with 2 items. It lists two reports: 'Employee's working on projects report' and 'Assets assigned to Employees'. There are also links for 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports'. On the right side of the content area, there's a 'Search recent reports...' bar and a 'New Report' button (also highlighted with a red box). Below the content area, there's a section titled 'Create Report'.

The screenshot shows the 'Create Report' dialog box. On the left, there's a sidebar with a 'Category' section and a list of recently used and all objects. A red box highlights the search bar where 'gas' is typed. The main panel has a 'Select a Report Type' section with a search bar and a list of report types. One item, 'Gas Stations with Buyers', is highlighted with a red box. To the right, there's a 'Details' section for 'Gas Stations with Buyers' (Standard Report Type). It includes a 'Start Report' button (highlighted with a red box), a 'Details' link, and a note about fields (32). Below this, there are sections for 'Created By You' and 'Created By Others', both stating 'No Reports Yet'. At the bottom, there's a section for 'Objects Used in Report Type' with a 'Buyer' icon.

1. Their outline pane is opened already; select the fields that are mentioned below in the column section.
  - a. Fuel filled in vehicle
  - b. Amount paid
2. Remove the unnecessary fields.
3. Select the fields that are mentioned below in the GROUP ROWS section.
  - a. Fuel Available in bunk
  - b. Customer name

## APPLICATION TO MAKE THE GAS FILLING STATION EASY USING CRM ( ADMIN )

**REPORT ▾** New Gas Stations with Buyers Report **Gas Stations with Buyers**

Fields > **Outline** **Filters** Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

| Fuel Available in bunk | Customer name  | Fuel filled in vehicle | Amount Paid  |
|------------------------|----------------|------------------------|--------------|
| 2,718.00 (7)           | sunny bunny    | 70                     | ₹6,720.00    |
|                        | bunny g        | 15                     | ₹1,440.00    |
|                        | upadhye shivam | 70                     | ₹6,720.00    |
|                        | sandeep gujja  | 7                      | ₹672.00      |
|                        | drug dealer    | 2,000                  | ₹1,92,000.00 |
|                        | sasuke uchiha  | 50                     | ₹4,800.00    |
|                        | naruto uzumaki | 70                     | ₹6,720.00    |
| Subtotal               |                | 2,282                  | ₹2,19,072.00 |
| Total (7)              |                | 2,282                  | ₹2,19,072.00 |

Row Counts  Detail Rows  Subtotals  Grand Total

**Fields** > **Outline** **Filters** Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

**Groups**

- GROUP ROWS**
  - Add group...
  - Fuel Available in bunk**

**GROUP COLUMNS**

- Add group...

**Columns**

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

**3** **7 Conditional Formatting**

7. Click on conditional formatting located at the bottom of the preview pane.
8. Click on add conditional formatting rule.

### Conditional Formatting Rules



No Conditional Formatting Rules Created

**Add Conditional Formatting Rule**

**Cancel** **Apply**

9. Change the apply conditional formatting to “ sum of Amount paid ”.
10. Mention the range from “ 1000 to 5000 ”.
11. Don't change the color's > click on Done.
12. Click apply

## Add Conditional Formatting Rule

Apply Conditional Formatting to i

Sum of Amount Paid ▼ ←

| Range       | Background Color  |   |
|-------------|---|---|
| <= 0        | <span style="color: red;">█</span> <span style="border: 1px solid black; padding: 2px;">▼</span>    | X |
| > 0 to 5000 | <span style="color: orange;">█</span> <span style="border: 1px solid black; padding: 2px;">▼</span> | X |
| > 5,000     | <span style="color: green;">█</span> <span style="border: 1px solid black; padding: 2px;">▼</span>  | X |

Cancel Done ↓

13. Click save > give the report name as “Amount range”,
14. Report unique name will be auto populated.
15. Click on the Select Folder > select “ Fuel estimation ” > click on the Select Folder
16. Click save.

Select

All Folders > Fuel Estimation

Search folders...

- █ Einstein Bot Reports ▶
- █ Einstein Bot Reports Summer '23 ▶
- █ Einstein Bot Reports Summer '22 ▶
- █ Einstein Bot Reports Winter '23 ▶
- █ Fuel Estimation ▶ Select



Nothing here yet  
This folder has no subfolders.

New Folder Select Folder

APPLICATION TO MAKE THE GAS FILLING STATION EASY USING CRM ( ADMIN )

Save Report

|  |   |
|--|---|
| * Report Name<br>Amount range          |  4   |
| Report Unique Name<br>Amount_range_SN1 |  2   |
| Report Description                     |   |
| Folder<br>Fuel Estimation              |  4   |
|  |  3 |
|  |  5 |

17. Click save & run, then the preview will be shown below.

| Report: Gas Stations with Buyers<br><b>Amount range</b>  |   |  |   |  |
|--|---|--|---|--|
| Total Records  | Total Fuel filled in vehicle  | Total Amount Paid  |   |  |
| 10   | 661   | <b>76,676.00</b>   |   |  |
| <input type="checkbox"/> Fuel Available in bunk ↑ ▾  | <input type="button"/> Customer Name ▾  | <input type="button"/> Fuel filled in vehicle ▾  | <input type="button"/> Amount Paid ▾  |  |
| <input type="checkbox"/> 79,339.00 (10)  | Michael Brown   | 120  | 13,920.00   |  |
|  | John Doe  | 70   | 8,120.00  |  |
|  | Jane Smith  | 5  | 580.00  |  |
|  | Bob Johnson   | 25   | 2,900.00  |  |
|  | Alice Williams  | 15   | 1,740.00  |  |
|  | Emily Jones   | 40   | 4,640.00  |  |
|  | Sarah Davis   | 95   | 11,020.00   |  |
|  | David Miller  | 255  | 29,580.00   |  |
|  | Chris Garcia  | 30   | 3,480.00  |  |
|  | Laura Martinez  | 6  | 696.00  |  |
| <b>Subtotal</b>  |   | 661  | <b>76,676.00</b>  |  |
| <b>Total (10)</b>  |   | 661  | <b>76,676.00</b>  |  |
| Row Counts  | Detail Rows  | Subtotals  | Grand Total  |  |

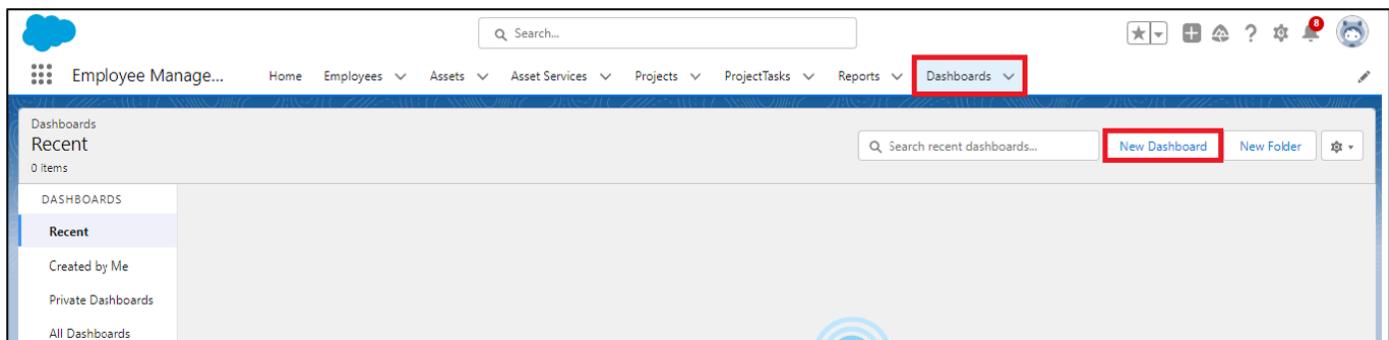
## 15. Dashboards

### 15.1 Create Dashboard Folder

1. Click on the app launcher > search for dashboard > click on it.
2. Click new folder
3. Give the folder label: "Amount estimation dashboard".
4. Folder unique name will be auto populated.
5. Click save.

### 15.2 Create Dashboard

1. Go to the app > click on the Dashboards tabs.

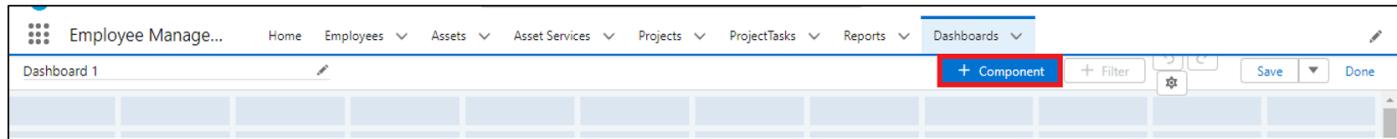


2. Give a Name "Estimation Amount" > select the folder that created > click on create.

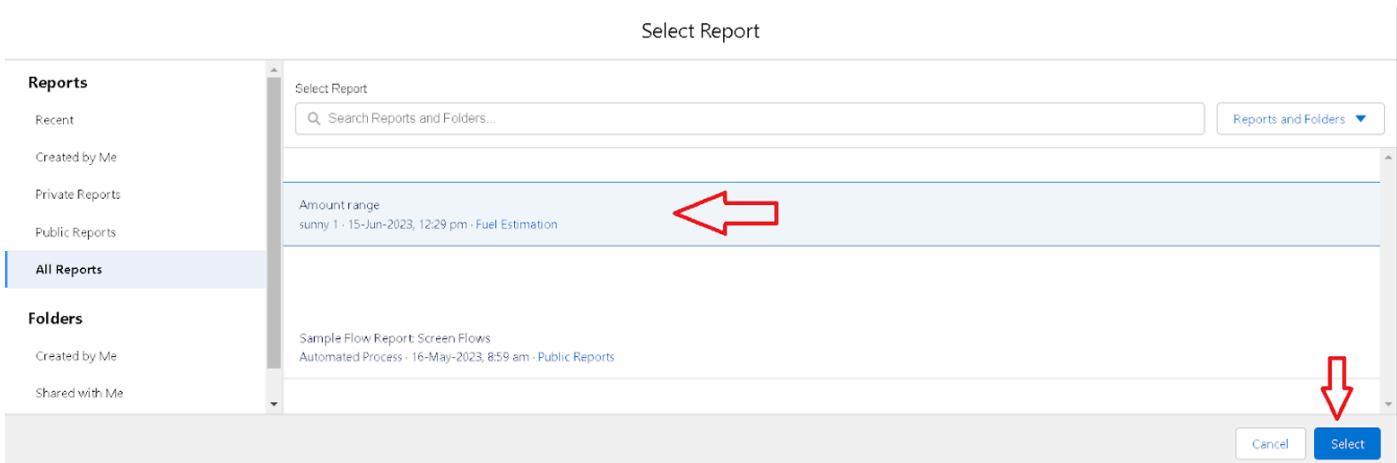
A screenshot of the 'New Dashboard' creation dialog. The title bar says 'New Dashboard'. There are three input fields: 'Name' (containing 'Estimation amount'), 'Description' (empty), and 'Folder' (containing 'Amount estimation dashboard'). To the right of the 'Folder' field is a 'Select Folder' button. At the bottom right are 'Cancel' and 'Create' buttons, with 'Create' being highlighted with a red box.

3. Select add component.

## APPLICATION TO MAKE THE GAS FILLING STATION EASY USING CRM ( ADMIN )

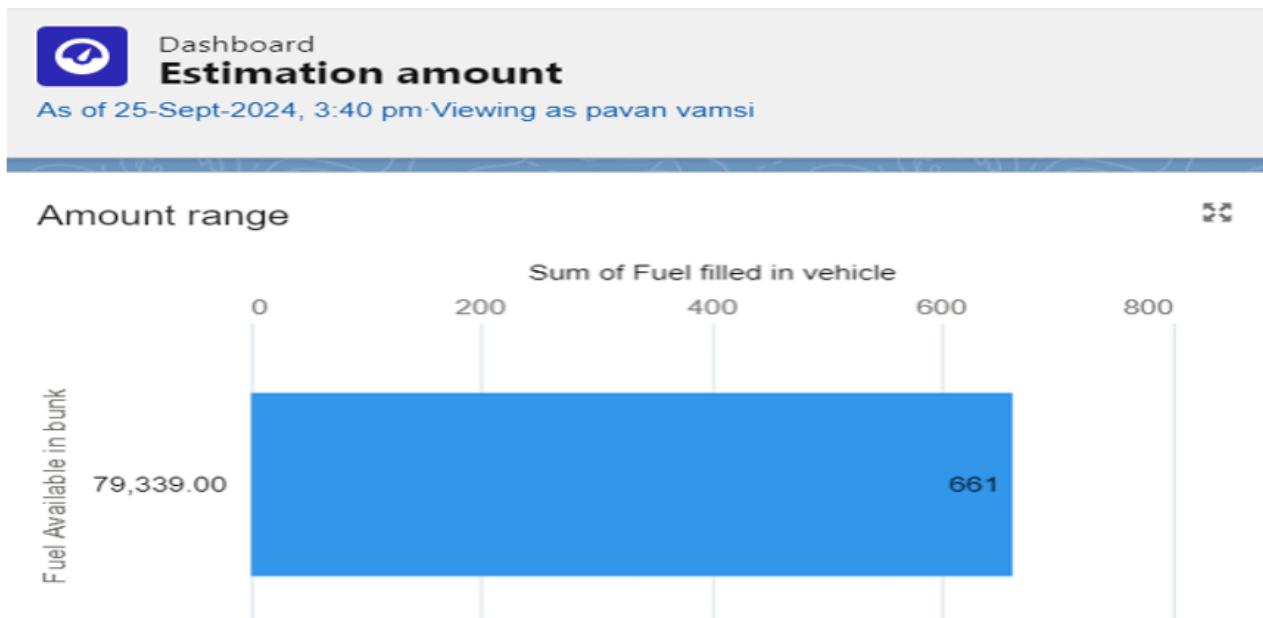


4. Select a Report and click on select.



5. Click Add > click Save > click Done.

6. Preview is shown below.

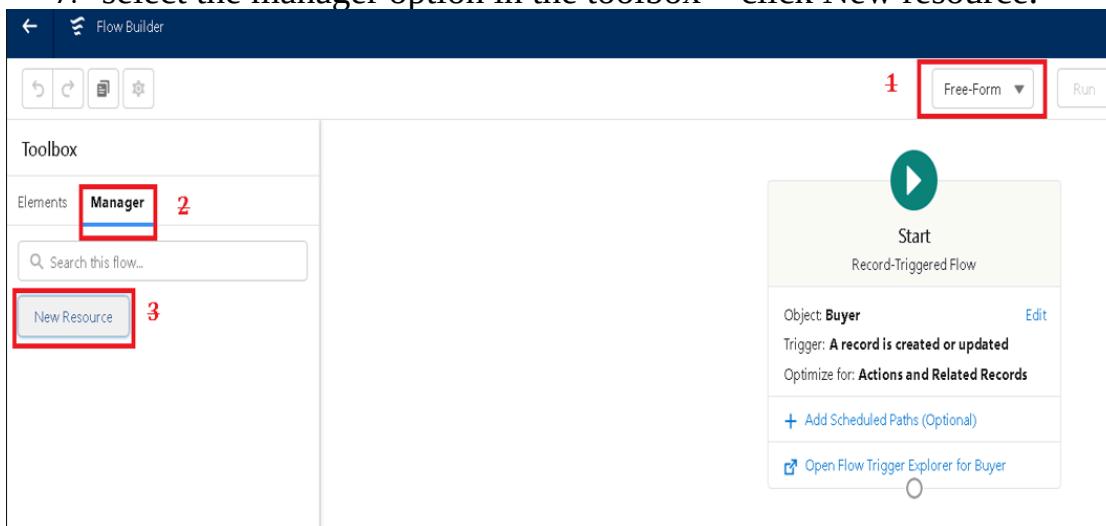


[View Report \(Amount range\)](#)

## 16. Flows

### Create a Flow

1. Go to setup > type Flow in the quick find box > Click on the Flow > Select the New Flow.
2. Select the Record-triggered flow > Click on Create.
3. Object: "buyer" in the Drop-down list.
4. Select the Trigger Flow when: "A record is Created or Updated".
5. Select the Optimize the flow for: "Actions and Related Records" > Click
6. change the mode from "Auto-layout" to "free-form".
7. select the manager option in the toolbox > click New resource.



8. Select the resource type as text template.

New Resource

\*Resource Type

Select...

Variable  
Store a value that can be used and changed throughout the flow.

Constant  
Store a value that can be used but not changed throughout the flow.

9. API name: emailbody.

10. In the body field, paste the syntax that is given below.

Hello {!\$Record.Customer\_name\_\_c},

Thank you for coming , we are glad and considering that we provided the best survise.

RECEPIT DETAILS :

Customer name : {!\$Record.Customer\_name\_\_c}

Amount paid by Customer : {!\$Record.Amount\_Paid\_\_c}

Vehicle type : {!\$Record.Vehicle\_type\_\_c}

Fuel intake in vehicle : {!\$Record.Fuel\_filled\_in\_vehicle\_\_c}

11. Change the view as Rich Text -" View to Plain Text".

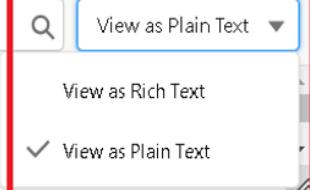
12. Click done.

Edit Text Template

---

\*API Name  
emailbody  1

Description  


\*Body   
Insert a resource...    
 3  
Hello {!\$Record.Customer\_name\_\_c},  
Thank you for coming , we are glad and considering that we provided the best survise.  
  
2  
View as Rich Text  
✓ View as Plain Text

 4 

13. click on elements, and drag the action element into the preview pane.
14. Their action bar will be opened in that search for “ send email ” > click on it.1
15. label name: notice
16. API name will be auto populated.
17. Enable the body to set input values for the selected action.
18. Select the text template that created.

APPLICATION TO MAKE THE GAS FILLING STATION EASY USING CRM ( ADMIN )

### New Action

Filter By

Category ▾

All

- Users
- Commerce
- Work Plans
- Work Steps
- Appointments
- Messaging
- Price books
- Order Management
- Waitlists

Action

Send Email 1

\*Label 2 notice1

\*API Name notice1

Description

**Set Input Values for the Selected Action**

A<sub>a</sub> Body 3 {!emailbody} 4

A<sub>a</sub> Email Template ID

Include

Don't Include

Cancel
Done

19. Include recipient address list select the email form the record.

20. Include subject as “ welcome to gas station”.

21. Click done.

### Edit Action

A<sub>a</sub> Recipient Address List (!\$Record.Email\_c)

A<sub>a</sub> Email\_c Email

A<sub>a</sub> Related Record ID

A<sub>a</sub> Rich-Text-Formatted Body

A<sub>a</sub> Sender Email Address

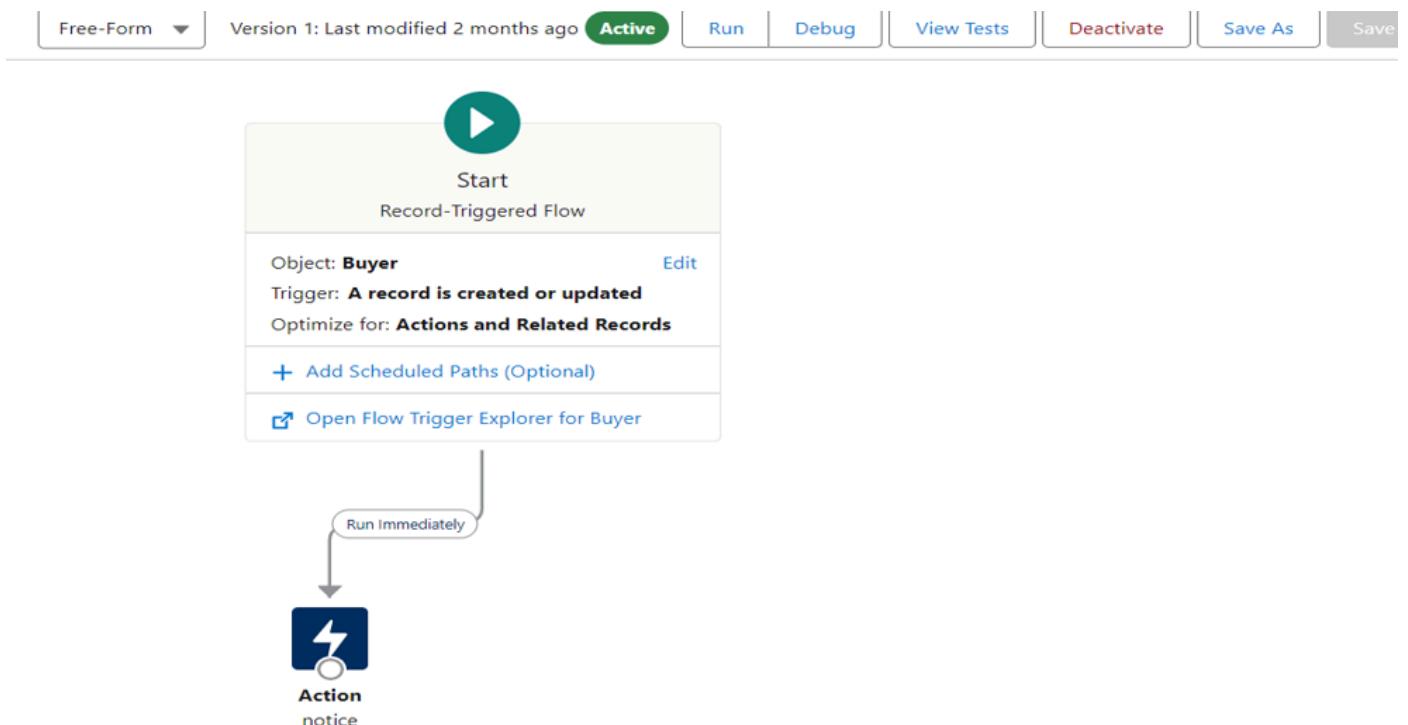
A<sub>a</sub> Sender Type

A<sub>a</sub> Subject Welcome to the Gas Station

Include  
 Don't Include  
 Don't Include  
 Don't Include  
 Don't Include  
 Don't Include  
 Include  
 Done

APPLICATION TO MAKE THE GAS FILLING STATION EASY USING CRM ( ADMIN )

22. Drag the path from the start to the action element.
23. Click on save > Give the Flow label; the Flow Api name will be auto-populated.
24. And click save, and click on activate.



## APPLICATION TO MAKE THE GAS FILLING STATION EASY USING CRM ( ADMIN )

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

**Page Header:** ChatGPT, SI-5440, Student, Welcome, Welcome, Flows, Welcome, Download, New Tab, APPLICATION, Infosys, +

**Search Bar:** Search Setup

**Left Sidebar (Setup Home):**

- Quick Find
- Setup Home
- Service Setup Assistant
- Commerce Setup Assistant
- Multi-Factor Authentication Assistant
- Hyperforce Assistant
- Release Updates
- Lightning Experience Transition Assistant
- Salesforce Mobile App
- Lightning Usage
- Optimizer
- Sales Cloud Everywhere
- ADMINISTRATION
  - > Users
  - > Data
  - > Email

**Flows Page Content:**

**Flow Detail:** Buyer Welcome Email Flow

| Flow Label               | Description                          | Flow API Name            | Namespace Prefix                     |
|--------------------------|--------------------------------------|--------------------------|--------------------------------------|
| Buyer Welcome Email Flow |                                      | Buyer_Welcome_Email_Flow |                                      |
| Environments             | Default                              | Type                     | Autolaunched Flow                    |
| Active Version           | 1                                    | URL                      | /flow/Buyer_Welcome_Email_Flow       |
| Triggered By             | Record—Run After Save                | Activated/Deactivated By | PRAKASH BANAVASI 07/10/2024, 2:21 am |
| Modified By              | PRAKASH BANAVASI 09/10/2024, 1:09 am | Created By               | PRAKASH BANAVASI 07/10/2024, 2:21 am |

**Flow Versions:**

| Action                  | Flow Label               | Version | Description | Built with   | Created Date        | Type              | Status | Progress Status | Run in Mode  | API Version for Running the Flow |
|-------------------------|--------------------------|---------|-------------|--------------|---------------------|-------------------|--------|-----------------|--------------|----------------------------------|
| Open   Run   Deactivate | Buyer Welcome Email Flow | 1       |             | Flow Builder | 07/10/2024, 2:21 am | Autolaunched Flow | Active | Activated       | Default Mode | 61.0                             |

References:

[https://skillwallet.smartinternz.com/Student/guided\\_project\\_info/5440#](https://skillwallet.smartinternz.com/Student/guided_project_info/5440#)

<https://salesforce.com>

# Thank you