

Project Title:

Gas Filling Store CRM Application in Salesforce

1. Project Overview

1.1 Introduction

The **Gas Filling Store CRM Application** is a robust solution designed to streamline the gas filling process for customers and store owners. Leveraging Salesforce's CRM capabilities, this application enhances customer experiences, optimizes operations, and improves efficiency. The solution includes functionalities such as supplier management, gas station operations, buyer details, and fuel records, ensuring smooth processes and effective communication.

1.2 Objectives

- **Enhance Customer Service:** Improve the gas filling experience for customers through a tailored CRM platform.
- **Streamline Store Operations:** Optimize interactions between suppliers, gas stations, and buyers.
- **Boost Efficiency:** Automate workflows and simplify operational tasks such as reporting, dashboards, and data tracking.

2. Salesforce Org Setup

A new Salesforce Developer account was created and activated to host the **Gas Filling Store CRM**. All application objects and configurations were performed within this Salesforce org.

3. Object Creation

3.1 Supplier Object

The **Supplier Object** was created to store supplier-related details, including supplier names, contact information, and fuel stock information.

3.2 Gas Station Object

This object tracks gas station details, including station names, locations, and fuel availability. It helps in mapping buyers to their nearest gas stations.

3.3 Buyer Object & Fuel Details Object

The **Buyer Object** captures information about individual buyers, while the **Fuel Details Object** stores data related to fuel type, quantity, and price. These objects are interconnected to provide a full view of transactions.

4. Tabs

4.1 Custom Tab Creation

A custom tab for each object (Supplier, Gas Station, Buyer, and Fuel Details) was created to enable easy navigation and management of records.

4.2 Remaining Tabs

Additional tabs for administrative purposes were added for a better user experience.

5. The Lightning App

5.1 Creating a Lightning App

The **Gas Filling Store App** was built using Salesforce's Lightning platform. This app serves as the central hub for managing the gas filling store's operations, offering a user-friendly interface and quick access to key objects.

6. Fields and Relationships

6.1 Junction Object

A junction object was created to connect **Buyer** and **Fuel Details** in a many-to-many relationship.

6.2 Master-Detail Relationship

A master-detail relationship was created between **Gas Station** and **Fuel Details**, ensuring that all fuel records are tightly linked to gas stations.

6.3 Number Field in Fuel Details Object

A custom number field was added to track the amount of fuel available at each station.

6.4 Roll-Up Summary

A roll-up summary field was created to calculate the total fuel sold at each gas station, aiding in sales analytics.

6.5 Formula Fields

- **Gas Station Object:** A formula field was added to calculate the fuel capacity of each station.
- **Buyer Object:** A cross-object formula field was created to calculate total fuel purchased by a buyer.

6.6 Picklist Field in Buyer Object

A picklist was added to track the buyer's preferred fuel type (Petrol, Diesel, LPG, etc.).

6.7 Validation Rules

Validation rules were implemented to ensure data accuracy, such as enforcing positive values

for fuel quantity and checking mandatory fields.

7. Page Layouts

7.1 Page Layout Creation

Custom page layouts were created for each object (Supplier, Gas Station, Buyer, and Fuel Details) to improve user experience by displaying only relevant fields.

8. Profiles and Roles

8.1 Manager Profile

The **Manager Profile** was created with full access to all objects, reports, and dashboards.

8.2 Sales Executive & Sales Person Profiles

These profiles were created with specific permissions based on their responsibilities, such as limited access to records they own.

9. Roles & Role Hierarchy

9.1 Manager Role

A **Manager Role** was created to ensure that managers have oversight of sales executives and store personnel.

9.2 Additional Roles

Other roles, such as **Sales Executive** and **Sales Person**, were set up to define the organizational hierarchy.

10. Users

10.1 User Creation

Multiple users were created for each profile, including **Manager**, **Sales Executive**, and **Sales Person**, allowing for tailored access levels.

11. Permission Sets

11.1 Creating Permission Sets

Permission sets were created to grant additional access to specific users who needed to

perform functions outside their profile limitations.

12. OWD Settings

12.1 Organization-Wide Defaults (OWD)

OWD settings were configured to ensure secure data access. For example, **Buyer Records** were set to private, ensuring that only relevant personnel could access specific data.

13. User Adoption

13.1 Creating Records

Sample records were created for suppliers, gas stations, and buyers to test the system's functionality and user adoption.

13.2 Viewing Records

Records were viewed and updated to verify data integrity and role-based access.

13.3 Deleting Records

Records were deleted to ensure that users with appropriate permissions could perform cleanup tasks.

14. Reports

14.1 Creating a Report Folder

A report folder named **Gas Filling Store Reports** was created to organize sales and operational reports.

14.2 Sharing Report Folder

The folder was shared with managers and executives to allow collaborative access to key business metrics.

14.3 Creating Reports

Several reports were created to track:

- **Fuel Sales by Station**
- **Buyer Purchase History**
- **Supplier Performance**

15. Dashboards

15.1 Creating a Dashboard Folder

A folder named **Gas Filling Store Dashboards** was created to house performance dashboards.

15.2 Creating Dashboards

Dashboards were created to provide real-time insights into:

- **Fuel Inventory**
- **Sales by Gas Station**
- **Buyer Fuel Preferences**

16. Flows

16.1 Creating a Flow

A flow was created to automate the process of sending email notifications to managers when fuel stock falls below a predefined threshold.

17. Conclusion

The **Gas Filling Store CRM Application** is a comprehensive solution tailored to meet the operational and business needs of gas filling stations. By leveraging Salesforce's capabilities, the application simplifies store management, improves customer engagement, and enhances operational efficiency.

