

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

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ABSTRACT

The Gas Filling Store CRM Application is a comprehensive solution designed to streamline and simplify the gas filling process for both customers and store owners. It leverages the power of customer relationship management (CRM) to enhance customer experiences, optimize store operations, and improve overall efficiency in the gas filling industry. This project aims to develop a user-friendly and feature-rich application that addresses the specific needs of gas filling stores.

In addition to core functionalities like customer data management, order tracking, and automated billing, the application can incorporate real-time gas delivery tracking, inventory monitoring, and personalized customer services. By integrating loyalty programs and providing detailed analytics for business insights, it not only improves store operational efficiency but also fosters stronger customer relationships, ensuring long-term business growth and success in the gas filling market.

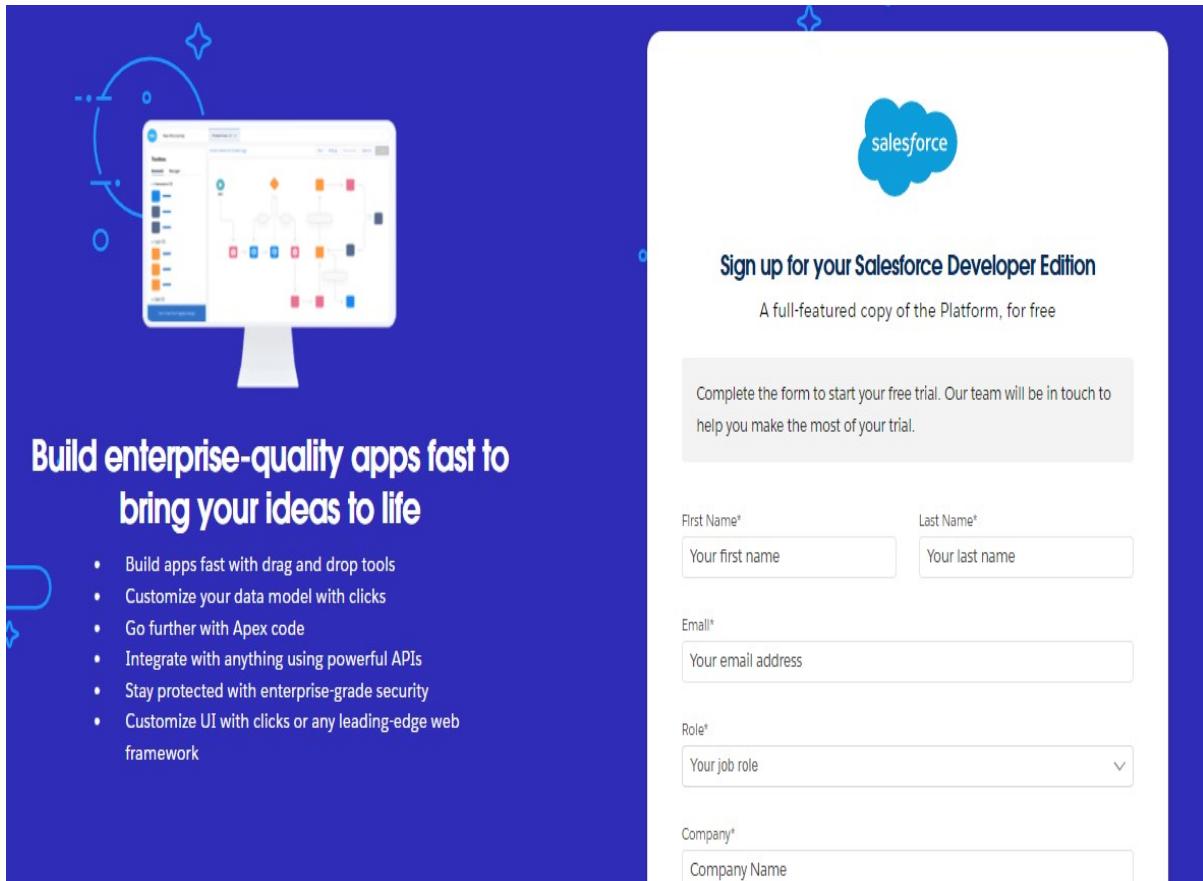
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1.CREATING DEVELOPER ACCOUNT

Step-1 : Creating a developer org in salesforce

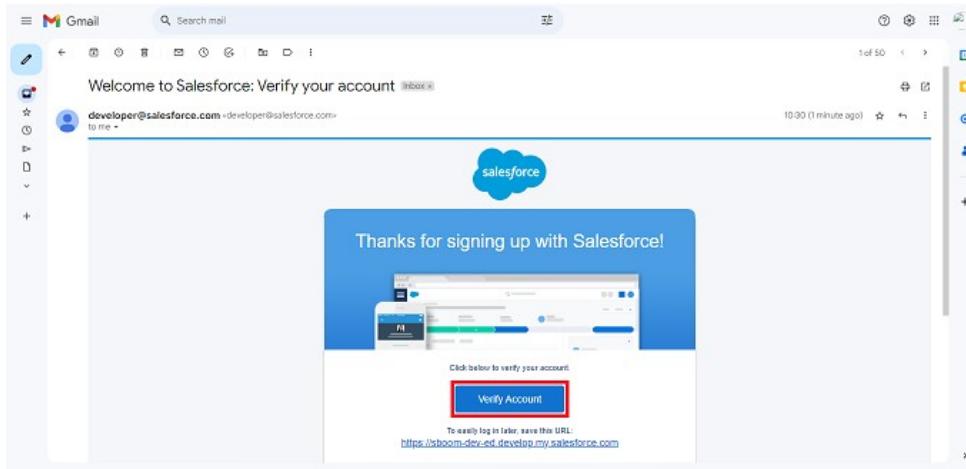
1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :



- a. First name & Last name
- b. Email
- c. Role : Developer
- d. Company : College Name
- e. County : India
- f. Postal Code : pin code

Step-2 : Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on verify account.
3. Give a password and answer a security question and click on change password.

Change Your Password

Enter a new password for lead@sb.oom.
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password

Good

* Confirm New Password

Match

Security Question

* In what city were you born?

* Answer

asdfghjkl

Change Password

4. when you will redirect to your salesforce setup page.

Step 3: Login to Your Salesforce Account

1. Go to login.salesforce.com.
2. Enter your username and password created during the sign-up process.
3. Login to access your Salesforce Developer account. ■ You will see the home page after logging in.



Search Setup



Setup

Home

Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication
Assistant

Release Updates

Lightning Experience
Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

> Users

SETUP
Home

Create ▾



Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

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Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

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Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

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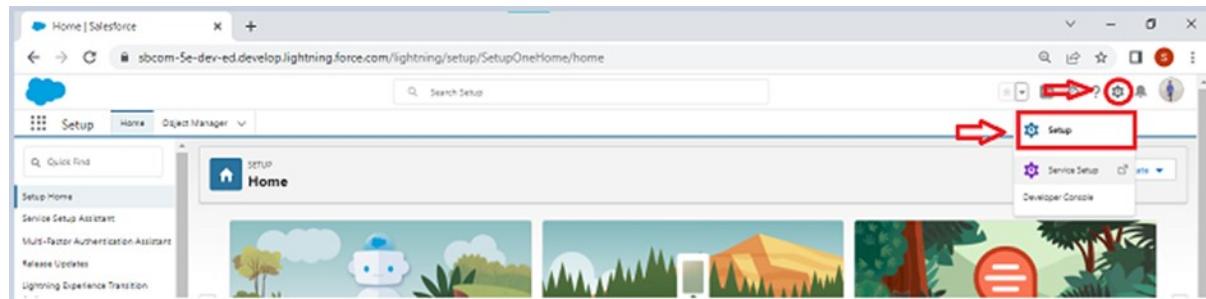
2.OBJECT

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

Salesforce objects are of two types:

1. **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.



2.1 Create Supplier Object

To create an object:

1. From the setup page , Click on Object Manager then Click on Create and Click on Custom Object.
 - a. Enter the label name then Supplier
 - b. Plural label name then Suppliers
 - c. Enter Record Name Label and Format
 - i. Record Name then Supplier Name
 - ii. Data Type then Name
2. Click on Allow reports and Track Field History,
3. Allow search then Save.

2.2 Create Gas Station Object

To create an object:

1. From the setup page then Click on Object Manager then Click on Create then Click on Custom Object.
 - a. Enter the label name then Gas Station
 - b. Plural label name then Gas Stations
 - c. Enter Record Name Label and Format
 - i. Record Name then Gas Station
 - ii. Data Type then Auto Number
 - iii. Display Format then Gas-{000}
 - iv. Starting number then 1
2. Click on Allow reports and Track Field History,
3. Allow search then Save.

2.3 Create Buyer and Fuel details Objects

Note:Follow the same steps as mentioned in Activity 2 for the Buyer and Receipt objects.

1. Use these display format for the Buyer
 2. label name then Buyer
 - a. Plural label name then Buyers
 - b. Display Format then Buyer-{000}
 - c. Starting number then 1
 3. Use these display format for the Fuel details
 4. label name then Fuel details
 - a. Plural label name then Fuel details
 - b. Display Format then fuel-{000}
 - c. Starting number then 1

3.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. **Types of Tabs:**

1. Custom Tabs :

Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

2. Web Tabs :

Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.

3. Visualforce Tabs :

Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

4. Lightning Component Tabs :

Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

5. Lightning Page Tabs :

Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

3.1 Creating a Custom Tab

To create a Tab:(supplier)

1. Go to setup page then type Tabs in Quick Find bar then click on tabs then New (under custom object tab)

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

- Setup**: A red box surrounds the 'Setup' button in the top left.
- Custom Tabs**: A red box surrounds the 'Custom Tabs' link under the 'Tabs' section.
- New Tab**: A red box surrounds the 'New Tab' button at the top right of the 'Custom Tabs' list.

2. Select Object(Supplier) then Select the tab style then Next (Add to profiles page) keep it as default then Next (Add to Custom App) uncheck the include tab .
3. Make sure that Append tab to users' existing personal customizations is checked. 4. Click save.

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).

Object	supplier
Tab Style	None
	Buyer
	Gas Station
	Receipt
(Optional) Choose a Home Page Custom Splash Page Custom Link	supplier

(Optional) Choose a Home Page Custom Splash Page Custom Link

Enter a short description.

Description	Supplier
-------------	----------

Next **Cancel**

Tab Style Selector

Create your own style

Hide styles which are used on other tabs

Airplane	Alarm clock	Apple	Balls
Bank[1]	Bell	Big top	Boat[1]
Books	Bottle	Box	Bridge
Building	Building Block	Caduceus	Camera
Can	Car	Castle	CD/DVD
Cell phone	Chalkboard	Chess piece	Chip
Circle	Compass	Computer	Credit card
CRT TV	Cup	Desk[1]	Diamond
Dice	Factory	Fan	Flag
Form	Gears	Globe	Guitar
Hammer	Hands	Handsaw	Headset
Heart[1]	Helicopter	Hexagon	Highway Sign
Hot Air Balloon	Insect	IP Phone	Jewel
Keys	Laptop	Leaf	Lightning

Save **Cancel**

Step 3. Add to Custom Apps

Step 3 of 3

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	<input type="checkbox"/> Include Tab
Platform (standard_Platform)	<input type="checkbox"/>
Sales (standard_Sales)	<input type="checkbox"/>
Service (standard_Service)	<input type="checkbox"/>
Marketing (standard_Marketing)	<input type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>

Save **Cancel**

Analytics Studio (standard_Insights)	<input type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard_LightningService)	<input type="checkbox"/>
Sales (standard_LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard_LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard_SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard_QueueManagement)	<input type="checkbox"/>
Bolt Solutions (standard_LightningBolt)	<input type="checkbox"/>
Data Manager (standard_DataManager)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard_LightningScheduler)	<input type="checkbox"/>

Append tab to users' existing personal customizations

Save **Cancel**

3.2 Creating Remaining Tabs

- Now create the Tabs for the remaining Objects, they are “ Gas station, Buyer, Fuel details”.

Follow the same steps as mentioned in Activity -1 .

4.THE LIGHTNING APP

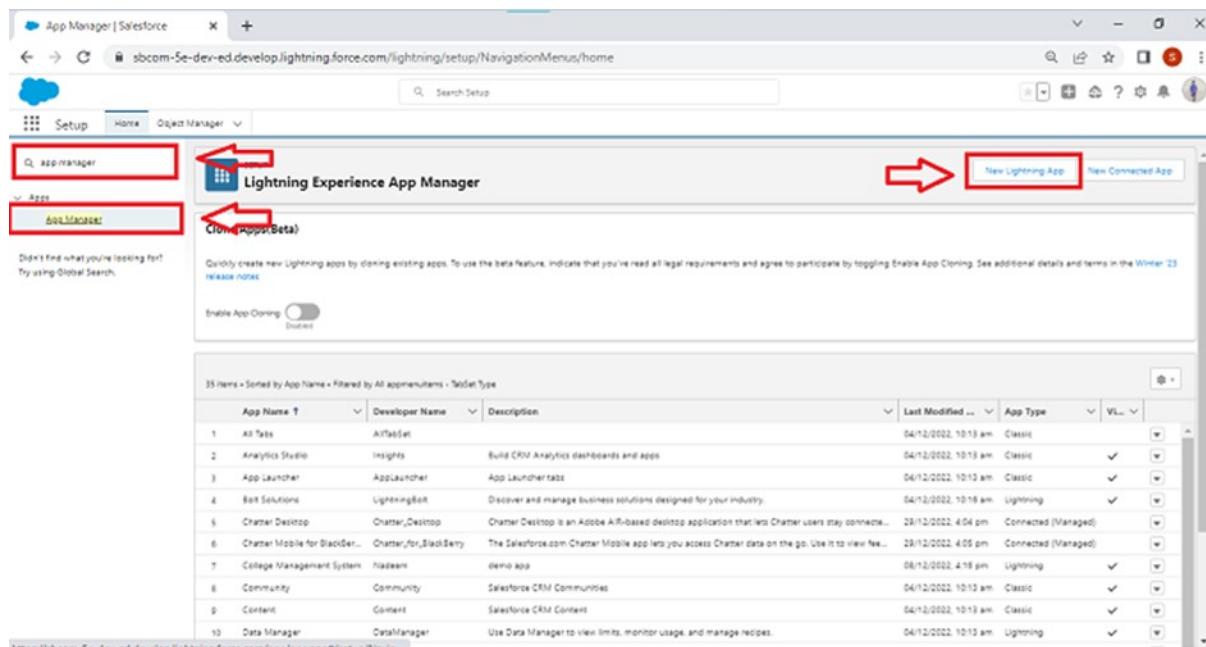
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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. Members of your org can work more efficiently by easily switching between apps.

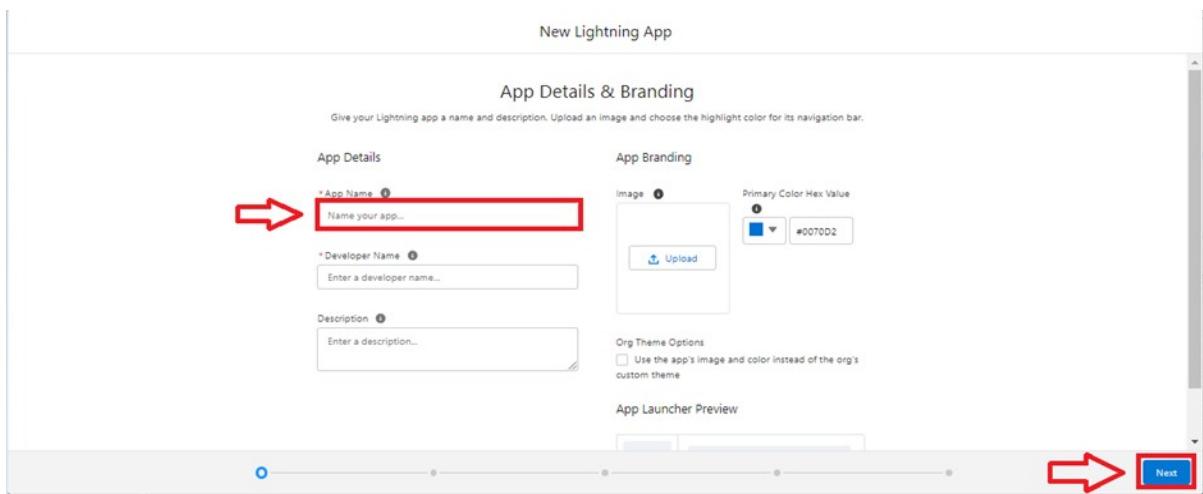
4.1 Create a Lightning App

To create a lightning app page:

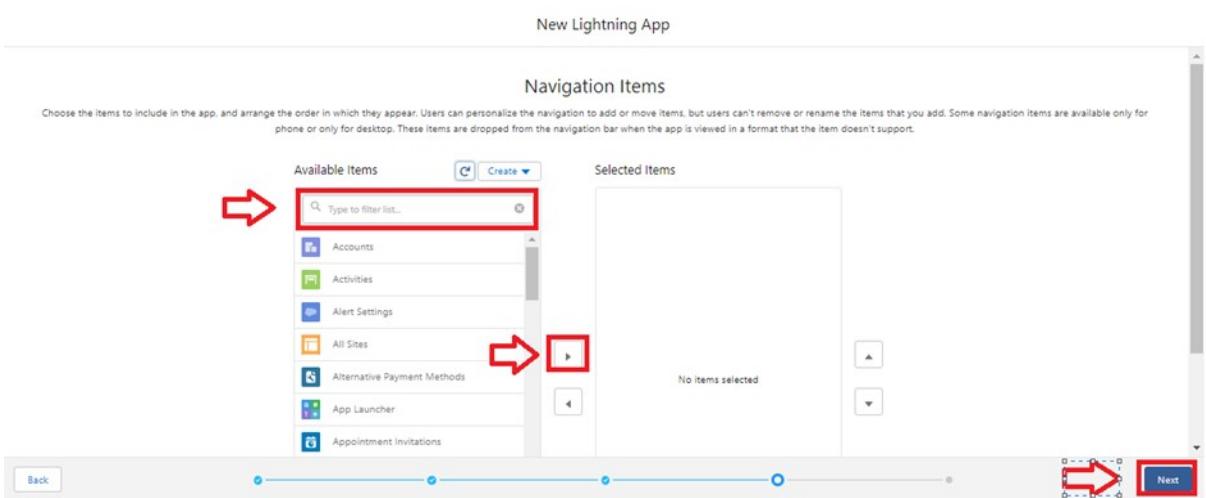
1. Go to setup page then search “app manager” in quick find then select “app manager” then click on New lightning App.



2. Fill the app name in app details as GAS STATION then Next then (App option page) keep it as default then Next then (Utility Items) keep it as default then Next.

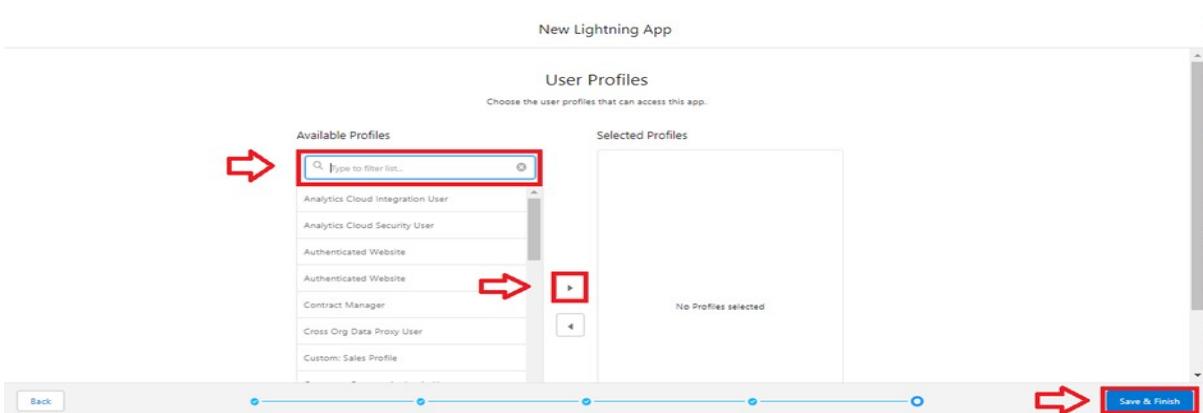


3. To Add Navigation Items:



Select the items (Supplier, Gas Station, Buyer, Receipt) from the search bar and move it using the arrow button then Next.

4. To Add User Profiles:



Search profiles (System administrator) in the search bar then click on the arrow button then save & finish.

5.FIELDS

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

1. Standard Fields
2. Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

?Created By

?Owner

?Last Modified

?Field Made During object Creation

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organization or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

5.1 Creating Junction Object

Junction object is a custom object that serves as a bridge between two related objects in a many-to-many relationship. It allows you to create a relationship between records of two different objects by creating a many-to-many relationship model.

Creating junction object as Fuel details with Supplier & Gas station To create junction object

1. Go to the setup page then click on object manager then From drop down click edit for Fuel details object.

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup' and 'Object Manager'. Below it is a search bar and a toolbar with icons. The main area displays two custom objects: 'Student' and 'Student_Activity'. The 'Student' object is highlighted with a red box around its name. A red arrow points to the 'API NAME' column for the 'Student' object, which is 'Student'. Another red arrow points to the 'Search' input field at the top right of the list.

2. Click on fields & relationship then click on New.

The screenshot shows the 'Fields & Relationships' page for the 'Supplier' object. On the left, there's a sidebar with various setup options like Page Layouts, Lightning Record Pages, etc. The main area is titled 'Fields & Relationships' and lists several fields with their labels, names, data types, and controlling fields. A red box highlights the 'New' button in the top right corner of the list table.

3. Select “Master-Detail relationship” as data type and click Next.

The screenshot shows the 'Data Type' step in the custom field creation wizard. It asks for the type of information the custom field will contain. There are several options: 'None Selected', 'Auto Number', 'Formula', 'Roll-Up Summary', 'Lookup Relationship', and 'Master-Detail Relationship'. The 'Master-Detail Relationship' option is selected and highlighted with a red box. A green arrow points to the 'Next' button in the top right corner.

4. Select the related object “Supplier” and click next.

The screenshot shows the 'Step 2. Choose the related object' step in the wizard. It asks to select the other object to which this object is related. A dropdown menu shows a list of objects, and 'Supplier' is selected and highlighted with a red box. A red arrow points to the 'Next' button in the top right corner.

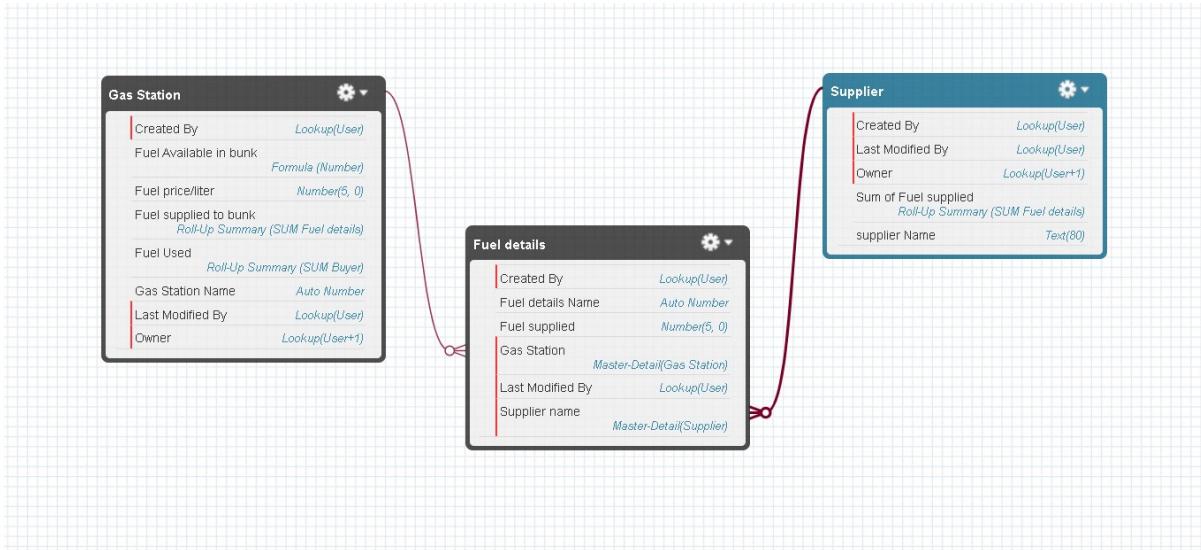
5. Give Field Label as “Supplier Name” and click Next.

6. Next then Next then Save & New.

7. Follow the same steps from 1 to 3.

8. Select the related object “Gas station” and click Next.

9. Give Field Label as “**Gas Station**” and click Next.
10. Next then Next then Save.
11. Below their is an overview of junction object for better understanding.



5.2 Creating a Master-Detail Relationship

Master-detail relationship is a type of relationship between two objects where the master object controls certain behaviors and settings of the detail object. Here are a few use cases that demonstrate the use of master-detail relationships

Creating Master-Detail Relationship between Buyer & Gas Station Object

To Create a Master-Detail relationship

1. Go to the setup page then click on object manager then From drop down click edit for **Buyer** object.
2. Click on fields & relationship then click on New.
3. Select “**Master-Detail relationship**” as data type and click Next.
4. Select the related object “ **Gas station** ”.
5. Give Field Label as “**Gas Station name**” and click Next.
6. Next then Next then Save.

5.3 Creating the number field in Fuel details object

Creating the number field in Fuel details object

1. Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as “**Number**” and click Next.
3. Given the Field Label as “ **Fuel Supplied** ” and length as “ **5** ”.

Step 2. Enter the details Step 2 of 4

Previous Next Cancel 

Field Label	<input type="text"/> 
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	<input type="text" value="18"/> 
Decimal Places	<input type="text" value="0"/> 
Field Name	<input type="text"/> 
Description	<input type="text"/>
Help Text	<input type="text"/> 
<input type="checkbox"/> Required <input type="checkbox"/> Always require a value in this field in order to save a record <input type="checkbox"/> Unique <input type="checkbox"/> Do not allow duplicate values <input type="checkbox"/> External ID <input type="checkbox"/> Set this field as the unique record identifier from an external system <input type="checkbox"/> AI Prediction <input type="checkbox"/> Use this field to store AI prediction scores <input checked="" type="checkbox"/> Auto add to custom report type <input type="checkbox"/> Add this field to existing custom report types that contain this entity 	

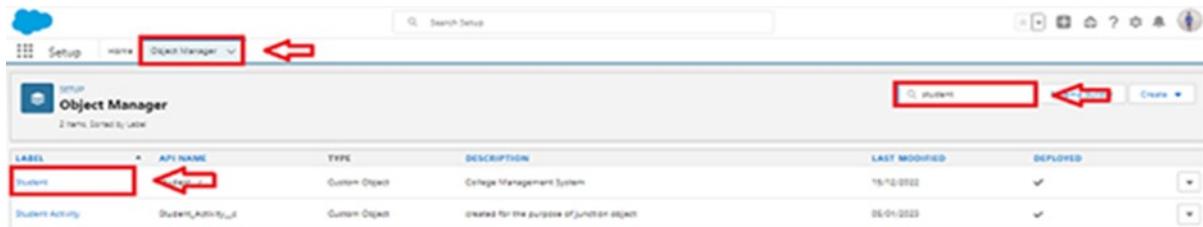
4. Field Name will be auto populated, and click on Next then Next then Save.

5.4 Creating the Roll-up Summary

A rollup summary field is a field that summarizes data from a child object to a parent object that share a master-detail relationship. Rollup summary fields can use the COUNT, SUM, MIN, and MAX functions. For example, you could use a rollup summary field to display the total value (amount of fuel supplied) from Fuel details on a related Supplier.

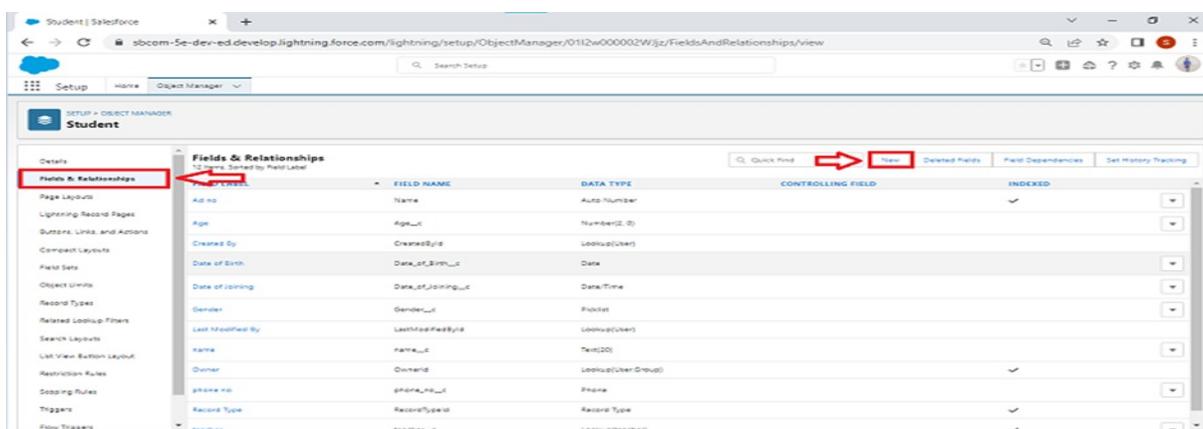
Creating the Roll-up summary field on Supplier & Gas Station Objects.

1. Go to setup then click on Object Manager then type object name(Supplier) in search bar then click on the object.



LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Supplier	Supplier	Custom Object	College Management System	16-12-2022	
Student Activity	Student_Activity__c	Custom Object	created for the purpose of junction object	06-01-2023	

2. Now click on “Fields & Relationships” then New



FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Name	Auto Number		
Age	Number(2, 0)		
Create By	Lookup(User)		
Date of Birth	Date		
Date of Joining	DateTime		
Gender	Picture		
Last Modified By	Lookup(User)		
Name	Text(20)		
Owner	Lookup(User Group)		
Phone No	Phone		
Record Type	Record Type		
Teacher	Lookup(teacher)		

3. Select the data type as “Rollup summary”, and click Next.

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.

4. Give the Field label as “ **sum of Fuel supplied** ”,Field Name will be Auto generated, and click Next.

Step 2. Enter the details

Step 2 of 5

Field Label

Field Name

Description

Help Text

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

Previous Next Cancel

5. Select the summarized object as “ **Fuel details** ”.
6. Select the Rollup type as “ **sum** ”.
7. Select the field to aggregate as “ **Fuel supplied** ”, and click Next then Next then Save.

Step 3. Define the summary calculation

Step 3 of 5

Select Object to Summarize

Master Object	Supplier
Summarized Object	<input type="text" value="Fuel details"/>

I = Required Information

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate

Filter Criteria

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

8. Follow the same steps for the Gas station Object from 1 to 3
9. Give the Field label as “ **Fuel supplied to bunk** ”,Field Name will be Auto generated, and click Next.
- 10.Select the summarized object as “ **Fuel details** ”.
- 11.Select the Rollup type as “ **sum** ”.
- 12.Select the field to aggregate as “ **Fuel supplied** ”, and click Next then Next then Save.

Note :create the field as “ **Fuel filled in vehicle** ” using number datatype in Buyer .

13. Follow the same steps for the Gas station Object from 1 to 3
14. Give the Field label as “ Fuel used ”, Field Name will be Auto generated, and click Next.
15. Select the summarized object as “ Buyer ”.
16. Select the Rollup type as “ sum ”.
17. Select the field to aggregate as “ Fuel filled in vehicle ”, and click Next then Next then Save.

5.5 Creating Formula Field in Gas Station Object

A **formula field** is a custom field that can be used to calculate or display data on a Salesforce record.

Formula fields can be used to perform a variety of tasks, such as:

- a. Calculating totals or averages
- b. Creating custom fields that display data from other fields
- c. Validating data entry
- d. Automating processes

1. Go to setup then click on Object Manager then type object name(Gas station) in search bar then click on the object.
2. Click on fields & relationship then click on New.
3. Select Data type as “**Formula**” and click Next.
4. Give Field Label and Field Name as “**Fuel Available in bunk**” and select formula return type as “**Number**” and click next.

Step 2. Choose output type

Step 2 of 5

Previous **Next** Cancel

Field Label	Field Name
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity
Formula Return Type	
<input checked="" type="radio"/> None Selected Select one of the data types below.	
<input type="radio"/> Checkbox Calculate a boolean value. Example: <code>[TODAY()] > CloseDate</code>	
<input type="radio"/> Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount. Example: <code>Gross Margin = Amount - Cost__c</code>	
<input type="radio"/> Date Calculate a date, for example, by adding or subtracting days to other dates. Example: <code>Reminder Date = CloseDate - 7</code>	
<input type="radio"/> Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time. Example: <code>[Start + NumberOfDays] = 4</code>	
<input checked="" type="radio"/> Number Calculate a numeric value. Example: <code>Fahrenheit = 1.8 * Celsius__c + 32</code>	
<input type="radio"/> Percent Calculate a percent and automatically add the percent sign to the number. Example: <code>Discount = (Amount - Discounted_Amount__c) / Amount</code>	

5. Under Advanced Formula write down the formula and click “**Check Syntax**” and Save.
6. Insert field formula should be : Fuel_supplied_to_bunk__c - Fuel_Used__c

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

Example: `Fahrenheit = 1.8 * Celsius_c + 32` [More Examples](#)

The screenshot shows the Salesforce formula editor. At the top, there are tabs for "Simple Formula" and "Advanced Formula", with "Simple Formula" selected. Below the tabs is a text input field containing the formula `FuelAvailable_in_bunk_(Number) = Fuel_supplied_to_bunk__c - Fuel_Used__c`. To the right of the input field is a button labeled "Insert Operator". Further right is a "Functions" sidebar with a list of available functions: ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, and an "Insert Selected Function" button. A red box highlights the formula input field.

7. Creating the Formula field in Buyer Object

Note: check whether that the fields that mentioned in the formula field are created are not , if not go to activity 9 and create that fields mentioned in Buyer object

8. Go to setup then click on Object Manager then type object name(Buyer) in search bar then click on the object.
9. Click on fields & relationship then click on New.
10. Select Data type as "**Formula**" and click Next.
11. Give Field Label and Field Name as "**Customer Name**" and select formula return type as "**TEXT**" and click next.
12. Insert field formula should be : `First_Name__c + '' + Last_Name__c`
13. click "Check Syntax" and Save.

5.6 Creating Cross Object Formula Field in Buyer Object

A cross-object formula field is a formula field that references fields from another object in Salesforce. This type of formula allows users to calculate and display data from multiple objects on a single record.

Note : check whether that the fields that mentioned in the formula field are created are not , if not go to activity 9 and create that fields mentioned in Buyer object.

1. Go to setup then click on Object Manager then type object name(Buyer) in search bar then click on the object.
2. Click on fields & relationship then click on New.
3. Select Data type as "**Formula**" and click Next.
4. Give Field Label and Field Name as "**Amount Paid**" and select formula return type as "**Number**" and click next.

Step 2. Choose output type

Step 2 of 5

Field Label Field Name

Auto add to custom report type Add this field to existing custom report types that contain this entity [i](#)

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: `[Now = NOW() + 4]`

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]`

Previous [Next](#) Cancel

5. Insert fields formula should be :

`Fuel_filled_in_vehicle__c * Gas_Station_name__r.Fuel_price_liter__c`

6. Under Advanced Formula write down the formula and click “Check Syntax” and Save.

Formula Return Type

Decimal Places

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

Example: `Gross Margin = Amount - Cost_c` [More Examples...](#)

Quick Tips [Getting Started](#) [Operators & Functions](#)

Simple Formula Advanced Formula

Insert Field

Amount Paid (Currency)=
`Fuel_filled_in_vehicle__c * Gas_Station_name__r.Fuel_price_liter__c`

Functions

`ABS`
`ACOS`
`ADDMONTHS`
`AND`
`ASCII`
`ASIN`

Formula Editor

5.7 Creating Picklist Field in Buyer Object

1. Go to setup then click on Object Manager then type object name(Buyer) in search bar then click on the object.
2. Click on fields & relationship then click on New.
3. Select Data type as “Picklist” and click Next.
4. Enter Field Label as “Vehicle type”, under values select “Enter values, with each value separated by a new line” and enter values as shown below.
5. The values are: two wheeler, three wheeler, four wheeler, six wheeler, eight wheeler and Others.

Step 2. Enter the details

Step 2 of 4

Field Label [i](#)

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

Two Wheeler
Three Wheeler
Four Wheeler
Six Wheeler
Eight Wheeler
Others

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](#)

Description

Previous [Next](#) Cancel

6. Click Next.
7. Next then Next then Save & New.
8. Repeat the process 1 and 2 steps .
9. Enter Field Label as “**Mode of payment**”, under values select “**Enter values, with each value separated by a new line**” and enter values as shown below.
- 10.The values are : credit card, debit card, net banking, upi, cash.
- 11.Click Next.
- 12.Next then Next then Save & New.

5.8 Creating the validation rule

Creating the validation rule for phone number field in Buyer object

Note:check wheather that the fields that mentioned in the formula field are created are not , if not go to activity 9 and create that fields mentioned in Buyer object.

1. Go to the setup page then click on object manager then From drop down click edit for Buyer object.
2. Click on the validation rule then click New.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
phone	Phone Number	incorrect data	✓	sunny 1, 12/06/2023, 12:00 pm

3. Enter the Rule name as “**Phone** ”.
4. Insert the Error Condition Formula as :-

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

Validation Rule Edit

Save Save & New Cancel

Rule Name Required Information

Active

Description

Error Condition Formula

Example: 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

Insert Field Insert Operator ▾

Required Information

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](#)

No errors found

5. Enter the Error Message as “incorrect data”, select the Error location as Field and select the field as “phone number”, and click Save.

Error Message

Example:
This message will appear when Error Condition formula is true

Error Message Required Information

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 Required Information

➡

1. Enter values, with each value separated by a new line and enter values as shown below.
The values are : credit card, debit card, net banking, upi, cash.
- 11.Click Next.
- 12.Next then Next then Save & New.

5.8 Creating the validation rule

Creating the validation rule for phone number field in Buyer object

Note: check whether the fields that mentioned in the formula field are created are not , if not go to activity 9 and create that fields mentioned in Buyer object.

1. Go to the setup page then click on object manager then From drop down click edit for Buyer object.
2. Click on the validation rule then click New.

Validation Rules

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
phone	Phone Number	incorrect data	✓	sunny 1, 12/06/2023, 12:00 pm

3. Enter the Rule name as "**Phone**".
 4. Insert the Error Condition Formula as :-
- NOT(REGEX(Phone_Number__c , "[6-9]{1}[0-9]{9}")).

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

Insert Field Insert Operator
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

5. Enter the Error Message as "**incorrect data**", select the Error location as **Field** and select the field as "**phone number**", and click Save.

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

6.PAGE LAYOUTS

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

6.1 creating the page layout

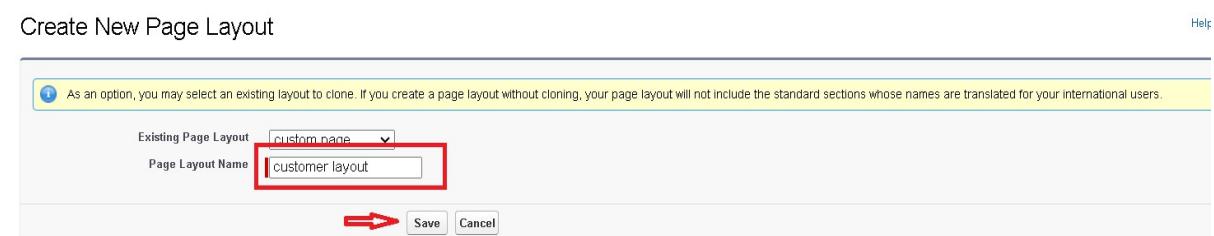
To Create a Page layout:

1. Go to Setup then Click on Object Manager then Search for the object (Buyer) then From drop down select the object and click on it.
2. Click on Page layout then Click on New.



The screenshot shows the Salesforce Object Manager interface for the 'Buyer' object. The left sidebar has tabs for Details, Fields & Relationships, Page Layouts (which is selected and highlighted in blue), Lightning Record Pages, and Buttons, Links, and Actions. The main area is titled 'Page Layouts' and shows one item: 'customer Layout'. The list includes columns for PAGE LAYOUT NAME, CREATED BY, and MODIFIED BY. A red arrow points to the 'Page Layouts' tab in the sidebar, and another red arrow points to the 'customer Layout' entry in the list.

3. Select the existing page layout, and give the page layout name as "customer layout", and click save.



The screenshot shows the 'Create New Page Layout' dialog box. It has a note at the top: '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.' Below this, there are two input fields: 'Existing Page Layout' (set to 'Custom name') and 'Page Layout Name' (containing 'customer layout'). At the bottom are 'Save' and 'Cancel' buttons, with a red arrow pointing to the 'Save' button.

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

7.PROFILES

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. 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. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

- a. Contract Manager
- b. Read Only
- c. Marketing User
- d. Solutions Manager
- e. Standard User
- f. System Administrator.

We cannot deleted standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

2. Custom Profiles:

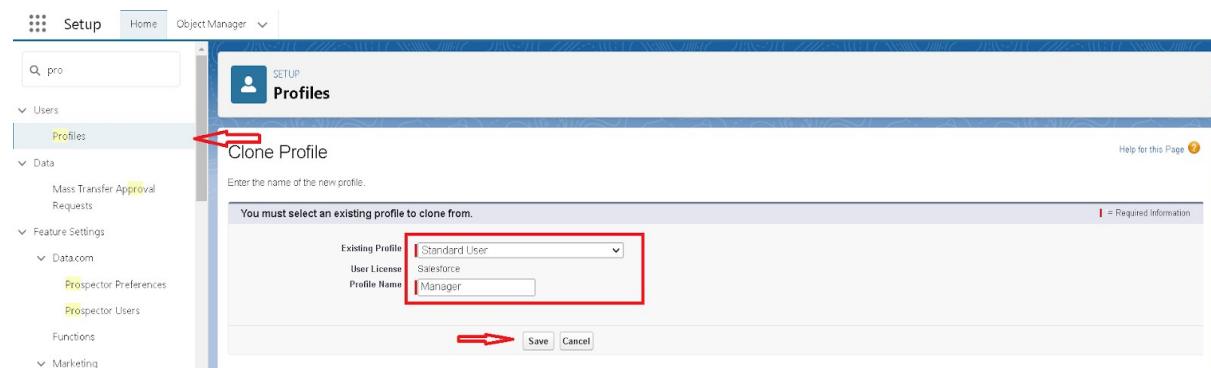
Custom ones defined by us.

They can be deleted if there are no users assigned with that particular one.

7.1 Manager Profile

To create a new profile:

1. Go to setup then type profiles in quick find box then click on profiles then clone the desired profile (Standard User) then enter profile name (Manager) then Save.



2. While still on the profile page, then click Edit.

The screenshot shows the 'Profile Manager' page for a user named 'Manager'. At the top, there are links for 'Login 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 Definitions Access', 'Enabled Flow Access', 'Enabled Service Presence Status Access', and 'Enabled Custom Permissions'. Below this, the 'Profile Detail' section shows the user's name, license ('Salesforce'), and a checked 'Custom Profile' checkbox. The 'Created By' and 'Modified By' fields both show 'sunny_1' with the timestamp '13/06/2023, 2:40 pm'. A red box highlights the 'Edit' button at the top of the profile detail section.

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

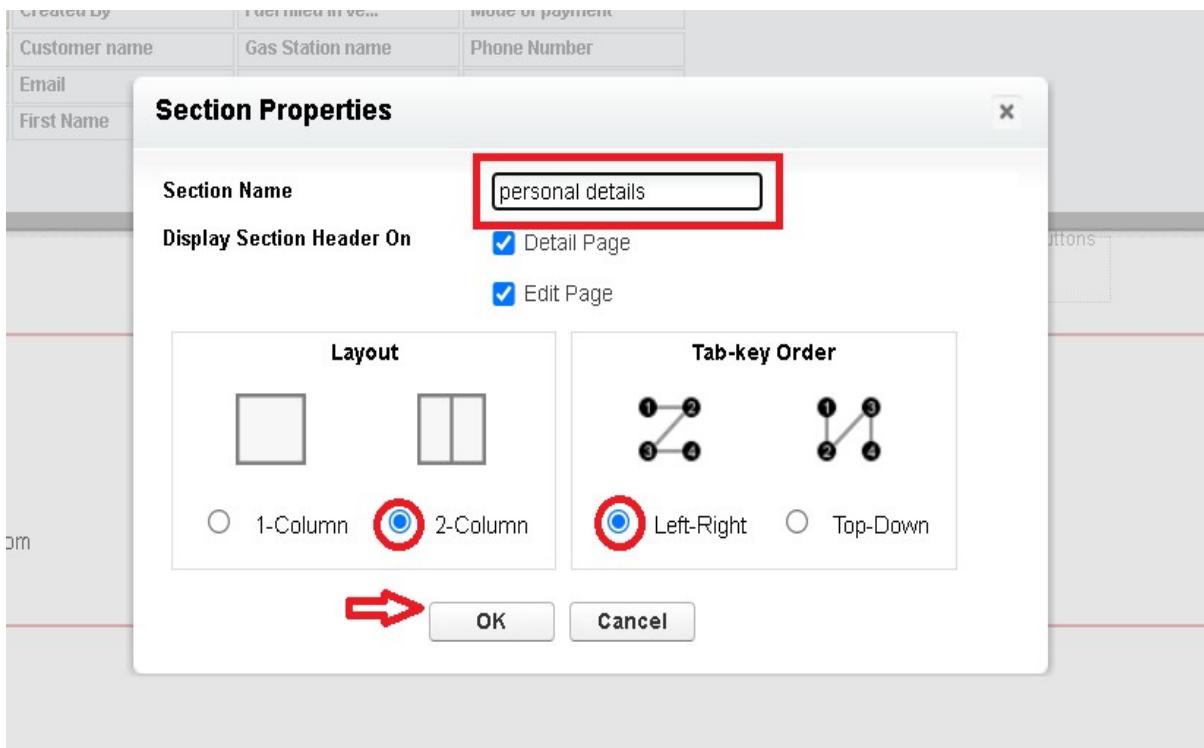
The screenshot shows the 'Custom App Settings' page. It lists several standard and custom apps with their visibility and default status. The 'Gas Station (Gas_Station)' app is highlighted with a red arrow pointing to its 'Default' checkbox, which is checked.

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

4. Scroll down to Custom Object Permissions and Give access permissions for Buyers, Fuel details , gas station and suppliers objects as mentioned in the below diagram.

The screenshot shows the 'Custom Object Permissions' page. It displays access permissions for various objects. The 'Buyers' and 'Fuel details' objects have their access permissions highlighted with a red box. The 'Gas Stations' and 'Suppliers' objects also have their access permissions highlighted with a red box. In the 'Session Settings' section, the 'Session Times Out After' field is set to '8 hours of inactivity' and is highlighted with a red box. In the 'Password Policies' section, several fields are highlighted with red boxes: 'User passwords expire in' (set to 'Never expires'), 'Enforce password history' (set to '3 passwords remembered'), 'Minimum password length' (set to '8'), 'Password complexity requirement' (set to 'Must include alpha, numeric, and special characters'), 'Password question requirement' (set to 'Cannot contain password'), 'Maximum invalid login attempts' (set to '3'), 'Lockout effective period' (set to '30 minutes'), and 'Obfuscate secret answer for password' (which is checked).

5. Change the session times out after should be “ **8 hours of inactivity** ”.
6. Change the password policies as mentioned :
7. User passwords expire in should be “ **never expires** ”.
8. Minimum password length should be “ **8** ”, and click save.



6. Now drag the fields to this section that mentioned , they are

- First name , last name , customer name , phone number, email, Gas station name.

1. Follow the same process for another two sections as shown above , they are
2. One section is “ **vehicle info** ” , drag the fields that are
 - Fuel filled in vehicle, vehicle type.
9. Another section is “ **Recepit details** ” , and drag the fields that are
 - Mode of payment , Amount paid.

	Created By	Fuel filled in ve...	Mode of payment
Customer name	Gas Station name	Phone Number	
Email			
First Name	Last Name		
Buyer number			

7.2 sales executive Profile

1. Go to setup then type profiles in quick find box then click on profiles then clone the desired profile (Salesforce Platform User) then enter profile name (sales executive) then Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the Gas station.
4. Scroll down to Custom Object Permissions and Give access permissions for Buyers, Fuel details , gas station and suppliers objects as mentioned in the below diagram.

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

7.3 sales person Profile

1. Go to setup then type profiles in quick find box then click on profiles then clone the desired profile (Salesforce Platform User) then enter profile name (sales person) then Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the Gas station.
4. Scroll down to Custom Object Permissions and Give access permissions for Buyers, Fuel details , gas station and suppliers objects as mentioned in the below diagram.

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

5. And click save.

8.ROLE & ROLE HIERARCHY

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

8.1 Creating Manager Role

Creating Manager Role:

1. Go to quick find then Search for Roles then click on set up roles.

The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. The left sidebar has a search bar with 'roles' typed in, which is highlighted with a red box. Below the search bar, under the 'Users' section, the 'Roles' link is also highlighted with a red box. The main content area is titled 'Understanding Roles' and contains a 'Sample Role Hierarchy'. It shows a tree structure starting from 'Executive Staff' (CEO, President, CFO, VP Sales) which branches down to 'Western Sales Director' (Director of W. Sales), 'Eastern Sales Director' (Director of E. Sales), and 'International Sales Director' (Director of Int'l Sales). Each director oversees several 'Sales Rep' roles (e.g., CA Sales Rep, NY Sales Rep, Asian Sales Rep, European Sales Rep). A tooltip for the 'International Sales Director' node provides details: 'View & edit data, roll up forecasts, & generate reports for all users directly below him/her. Can't access data of other users or at same level.' At the bottom right of the content area, there is a 'Set Up Roles' button highlighted with a red box. Below the content area, there is a note: 'Didn't find what you're looking for? Try using Global Search.' and a checkbox for 'Don't show this page again'.

2. Click on Expand All and click on add role under whom this role works.

The screenshot shows the 'Your Organization's Role Hierarchy' page. At the top, there is a 'Collapse All' and 'Expand All' button, with 'Expand All' highlighted with a red box. Below this, the 'Nick Enterprises' node is expanded, showing its children: 'CEO', 'HR', 'Manager', 'On Site Emp', and 'Remote Emp'. Each of these nodes has 'Edit', 'Del', and 'Assign' buttons. Under the 'Manager' node, there is another 'Add Role' button highlighted with a red box. The entire page is contained within a light gray border.

3. Give Label as “Manager” and Role name gets auto populated. Then click on Save.

Role Edit

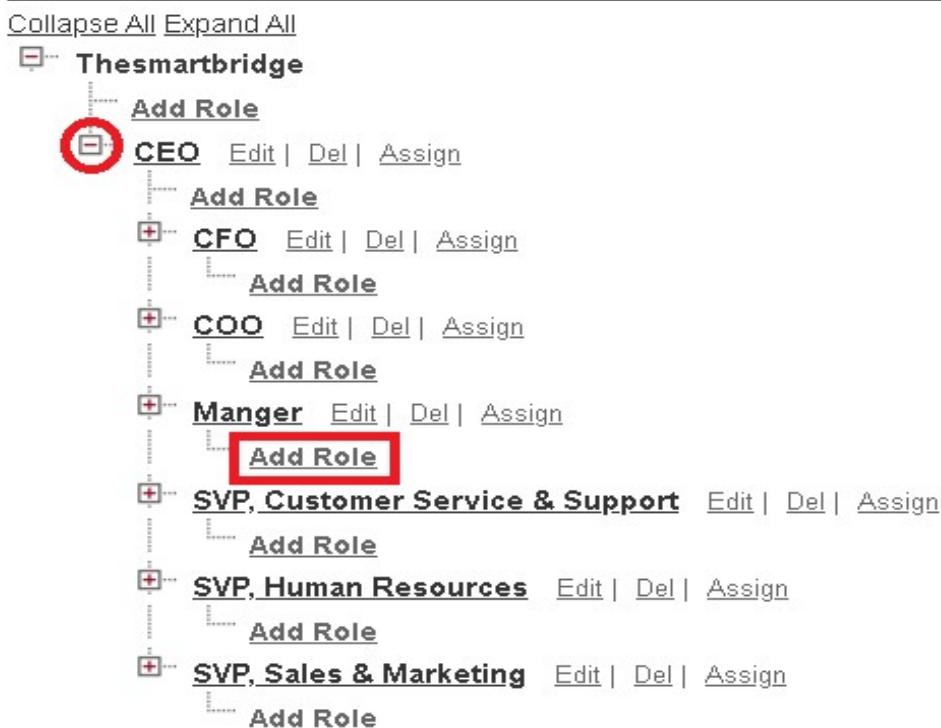
Label	<input type="text" value="Manger"/> 
Role Name	<input type="text" value="Manger"/> 
This role reports to	<input type="text" value="CEO"/> 
Role Name as displayed on reports	<input type="text"/>



8.2 Creating another roles

Creating another two roles under manager

1. Go to quick find then Search for Roles then click on set up roles.
 2. Click plus on CEO role, and click add role under manager.



3. Give Label as "**sales executive**" and Role name gets auto populated. Then click on Save.

Role Edit

New Role

Help for this Page 

Role Edit

Label	Sales executive	
Role Name	Sales_executive	
This role reports to	Manger	
Role Name as displayed on reports		



4. Repeat the same steps,another role.
 5. Click plus on CEO role, and click plus on manager, and click add role under

sales executive .



6. give Label as “**sales person**” and Role name gets auto populated. Then click on Save.

Role Edit

New Role

Help for this Page ?

Role Edit

Label	Sales person
Role Name	Sales_person
This role reports to	Sales executive
Role Name as displayed on reports	

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

9.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. The user account identifies the user, and the user account settings determine what features and records the user can access.

9.1 Create User

1. Go to setup then type users in quick find box then select users then click New user.
2. Fill in the fields
 1. First Name : Niklaus
 2. Last Name : Mikaelson
 3. Alias : Give a Alias Name
 4. Email id : Give your Personal Email id
 5. Username : Username should be in this form: text@text.text
 6. Nick Name : Give a Nickname
 7. Role : Manager
 8. User licence : Salesforce

New User

User Edit

Save Save & New Cancel

General Information

First Name: Niklaus
Last Name: Mikaelson
Alias: nmika
Email:
Username: Mikaelson@Niklaus
Nickname: nik
Title:
Company:
Department:
Division:

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--

9.2 creating another users

1. Follow the same steps from 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

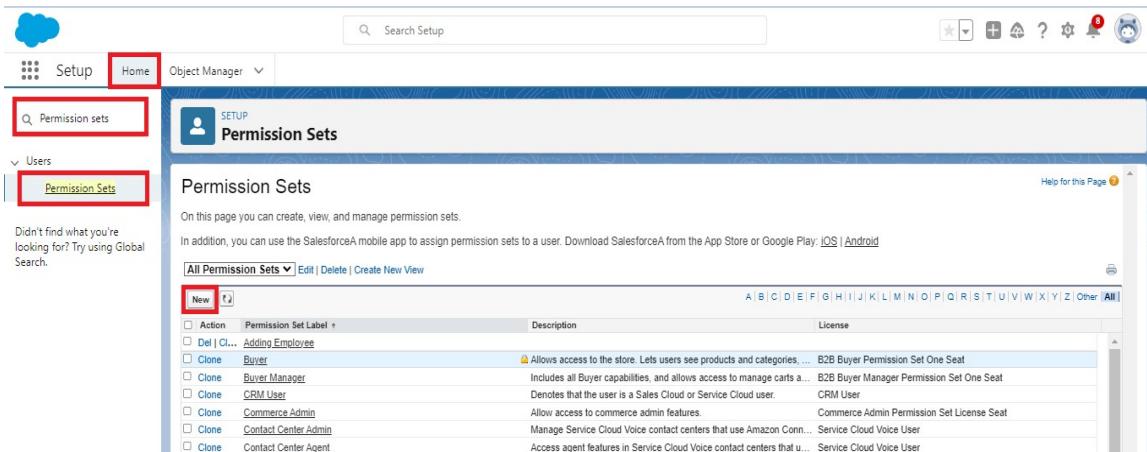
10.PERMISSION SETS

A standard permission set consists of a group of common permissions for a particular feature associated with a permission set license. Using a standard permission set saves you time and facilitates administration because you don't need to create the custom permission set.

10.1 Creating permission set

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets.

1. Go to setup then type “permission sets” in quick search then select permission sets then New.



The screenshot shows the Salesforce Setup interface. The top navigation bar has 'Setup' highlighted with a red box. Below it, the left sidebar has 'Permission Sets' selected under 'Users' with a red box. The main content area is titled 'Permission Sets' and contains a table of existing permission sets. A 'New' button at the top left of the table is highlighted with a red box. The table columns are 'Action', 'Permission Set Label', 'Description', and 'License'. The first few rows show permission sets like 'Adding Employee', 'Buyer', 'Buyer Manager', etc., each with a brief description and a 'Clone' or 'Delete' option.

2. Enter the label name as “P1”, API will be auto populated then Save.

➡ Save Cancel

Enter permission set information | = Required Information

Label	P1
API Name	P1
Description	additional access for sales executive profile
Session Activation Required	<input type="checkbox"/> i

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**
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

- Click on Fuel details object then click on Edit then under object permission check for read and create.

Permission Set
P1

Find Settings... | Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings ▾ Fuel details ▾

Fuel details Save Cancel

Tab Settings

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/> i

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

2. Click on Save.
3. After saving the permission click on the Manage assignment
4. Now click on the Add Assignment.

The screenshot shows the 'Current Assignments' page in Salesforce. At the top right, there is a red box around the 'Add Assignment' button. In the main list, a user named 'abd c' is selected, indicated by a checked checkbox in a red box. The 'Role' column for this user shows 'Sales executive' with a red box around it. At the bottom right of the list, there is another red box around the 'Next' button. Below this, a modal window titled 'Select an Expiration Option For Assigned Users' is open. It contains two radio buttons: 'No expiration date' (selected) and 'Specify the expiration date'. Under 'Specify the expiration date', there are buttons for '1 Day', '1 Week', '30 Days', '60 Days', and 'Custom Date'. To the right, there is a 'Time Zone' section with a dropdown menu labeled 'Select a time zone...'. At the bottom of the modal, there is a red arrow pointing down to the 'Assign' button, which is located next to a 'Back' button.

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

11.SETUP FOR OWD

Organization-Wide Defaults, or OWDs, are the pattern security rules that you can follow for your Salesforce instance. Organization Wide Defaults are utilized to confine who can access what information in your CRM. You can award access through different methods that we will discuss later (sharing principles, Role Hierarchy, Sales Teams, and Account groups, manual sharing, and so forth).

Primarily, there are four levels of access that can be set in Salesforce OWD and they are-

- ? Public Read/Write/Transfer (only available of Enquiry and Cases)
- ? Public Read/Write
- ? Public Read/Only
- ? Private

11.1 Create OWD Setting

1. Go to setup then type “sharing settings ” in quick search then 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 their profile.
5. But in our case we created a roles and given the roles in such a way that manager can see sales executive and sales person records , sales executive can see the sales person records.

12.USER ADOPTION

12.1 create a record

To create a record in junction object follow these steps

1. Click on the app launcher locate at left side of the screen.
 2. Search for “ Gas station” and click on it.
 3. Click on “ fuel details tab”.
 4. Click on new and fill the details as shown below figs, and click save.
 5. Creating the supplier record in fuel detail record, by clicking the “ new supplier ”.
 6. Fill the details in supplier record and click on save.
 7. Creating the Gas station record in fuel details record, by clicking on new gas station.
 8. Fill the details in gas station record, Click save.
 9. Fill the remaining details in fuel detail record , and click save.
- 10.Followed by these create 10 more records in Buyer object.

12.2 View a record

To create a record in junction object follow these steps

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

12.2 Delete a record

To create a record in junction object follow these steps

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

13.REPORTS

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

13.1 create a report folder

1. Click on the app launcher and search for reports.
2. Double click on the report, “ reports tab” will be autopopulated in navigation bar.
3. Click on the report tab, click on new folder.
4. Give the Folder label as “Fuel Estimation ”, Folder unique name will be auto populated.

13.2 Sharing a report folder

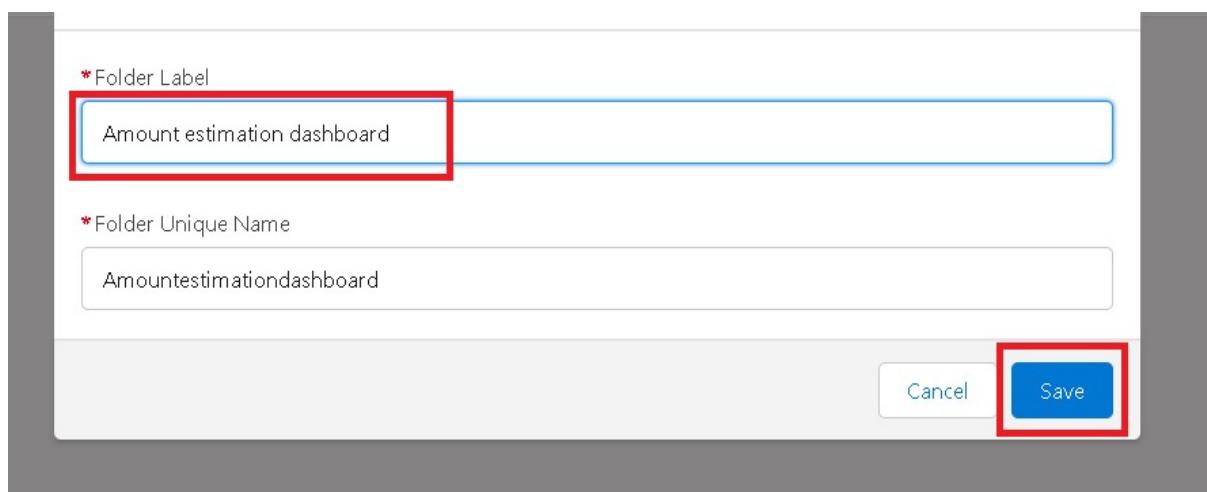
1. Go to the app then click on the reports tab.
2. Click on the All folder , click on the arrow for Fuel estimation folder, and Click on share.
3. Select the share with as “roles”, in name field search for “manager”, give “view” as access for that role.
4. Then click share, and click on Done.

14.Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

14.1 Create Dashboard Folder

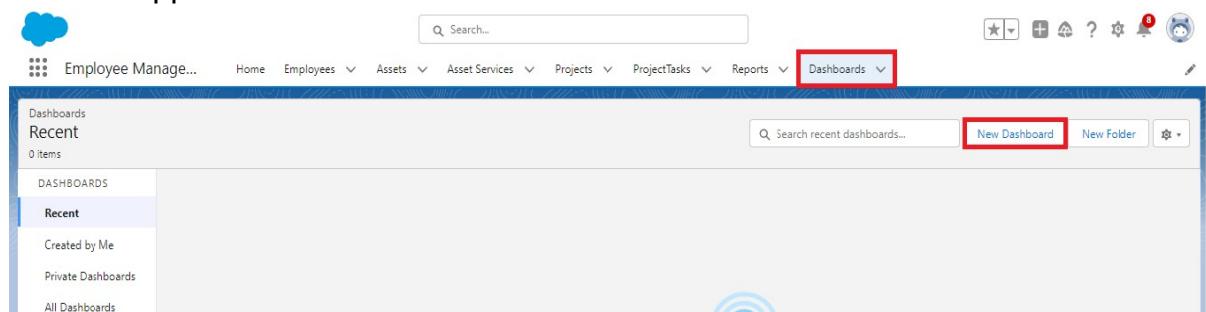
1. Click on the app launcher and search for dashboard.
2. Click on dashboard tab.
3. Click new folder, give the folder label as “ Amount estimation dashboard”.
4. Folder unique name will be auto populated. 5. Click save.



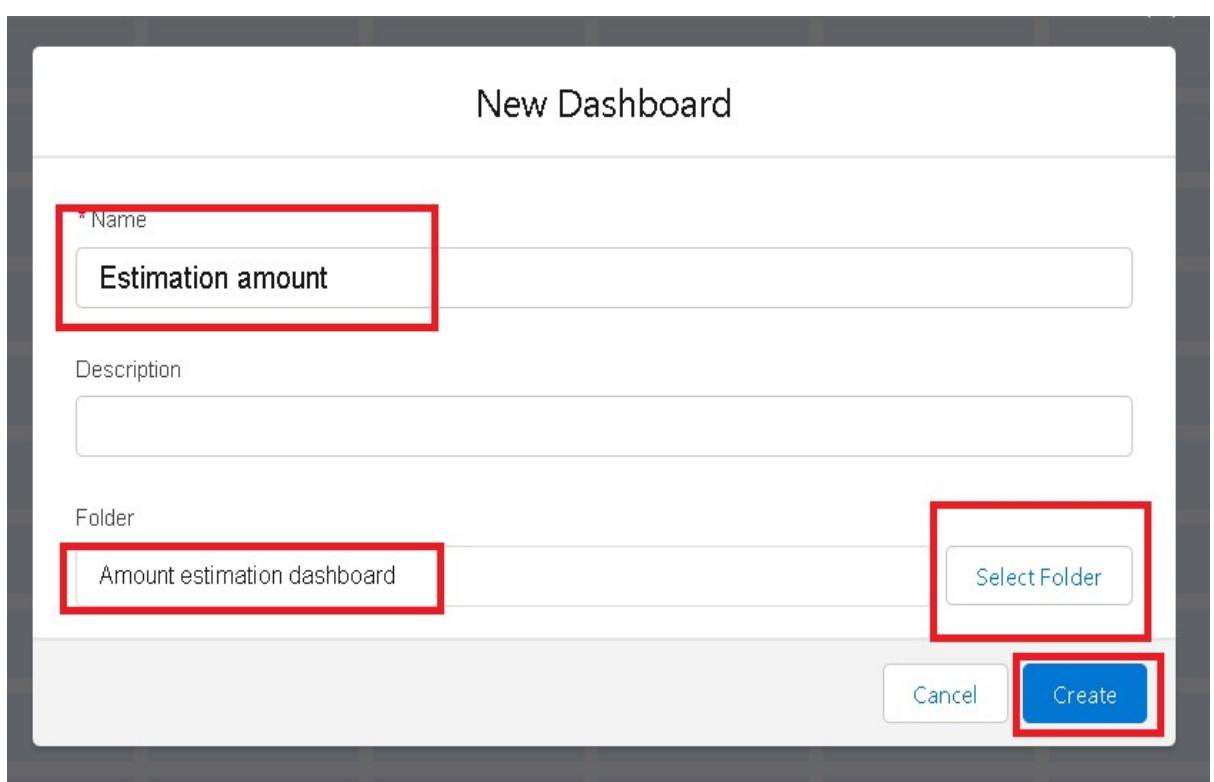
6. Follow the same steps, from milestone 12, and activity 2, and provide the sharing settings for the folder that just created.

14.2 Create Dashboard

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



2. Give a Name and select the folder that created, and click on create.



The screenshot shows the Employee Management software interface. At the top, there is a navigation bar with links for Home, Employees, Assets, Asset Services, Projects, ProjectTasks, Reports, and Dashboards. Below the navigation bar is a toolbar with buttons for '+ Component', '+ Filter', Save, and Done. A red box highlights the '+ Component' button. The main area is titled 'Dashboard 1' and contains a 'Select Report' dialog box.

1. Select a Report and click on select.

The 'Select Report' dialog box is shown. On the left, there is a sidebar with sections for Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), Folders (Created by Me, Shared with Me), and a search bar labeled 'Search Reports and Folders...'. In the main area, a report titled 'Amount range' is listed under 'All Reports'. A red arrow points to this report entry. At the bottom right of the dialog box are 'Cancel' and 'Select' buttons, with a red arrow pointing to the 'Select' button.

2. Click Add then click on Save and then click on Done.

3. Preview is shown below.

The report preview is titled 'Estimation amount'. It shows a message 'As of 15-Jun-2023, 2:50 pm Viewing as sunny 1'. Below this is a chart titled 'Amount range' with a horizontal scale from 0 to 2k. The chart lists customer names and their fuel availability in bunk, with corresponding blue bars. The data is as follows:

Customer name	Fuel Available in bunk	Sum of Fuel filled in vehicle
bunny g	2,718.00	15
drug d...	2,718.00	2k
naruto ...	2,718.00	70
sande...	2,718.00	7
sasuk...	2,718.00	50
sunny ...	2,718.00	70
upadhy...	2,718.00	70

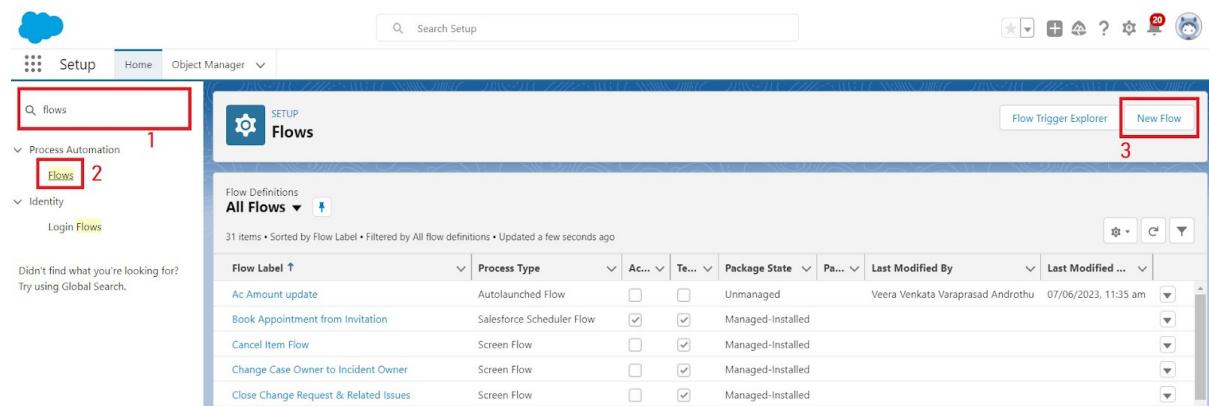
At the bottom, there is a link 'View Report (Amount range)'.

15.FLOWS

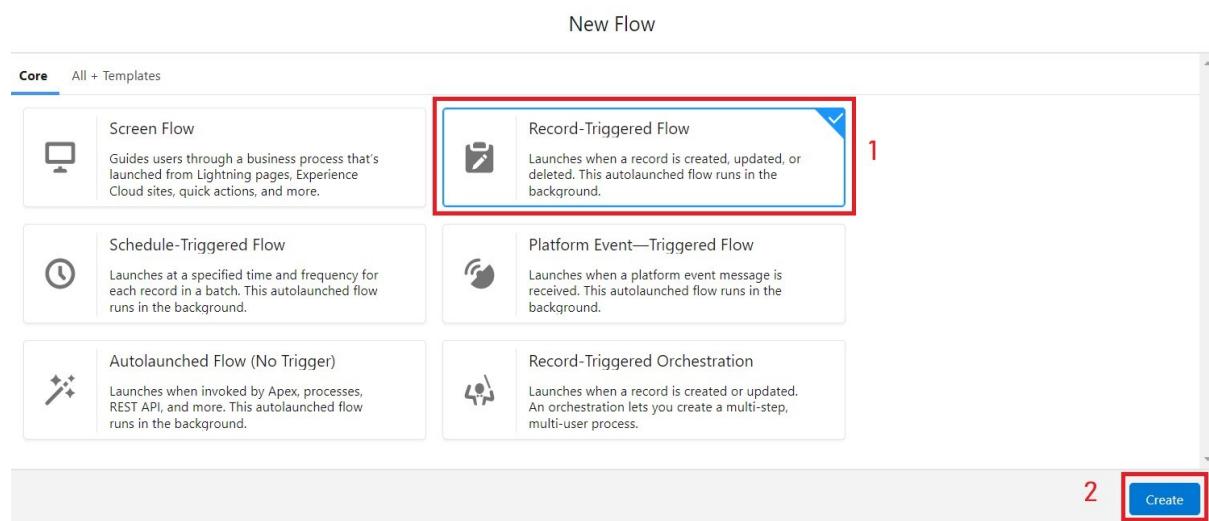
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

15.1Create a Flow

1. Go to setup then type Flow in quick find box then Click on the Flow and Select the New Flow.

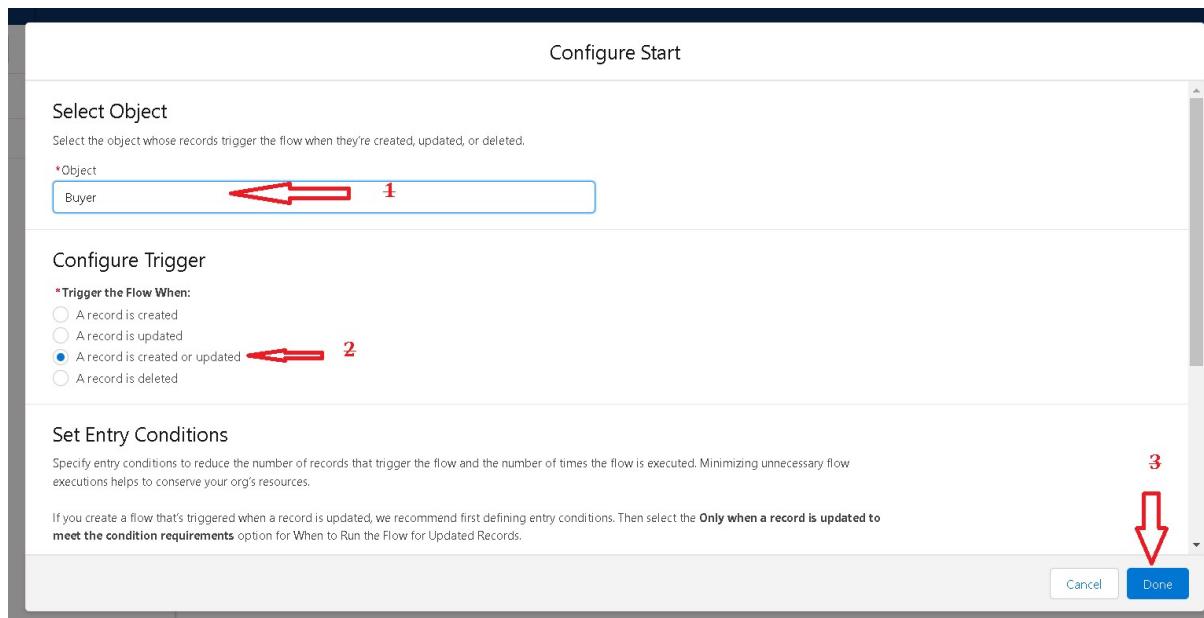


2. Select the Record-triggered flow and Click on Create.

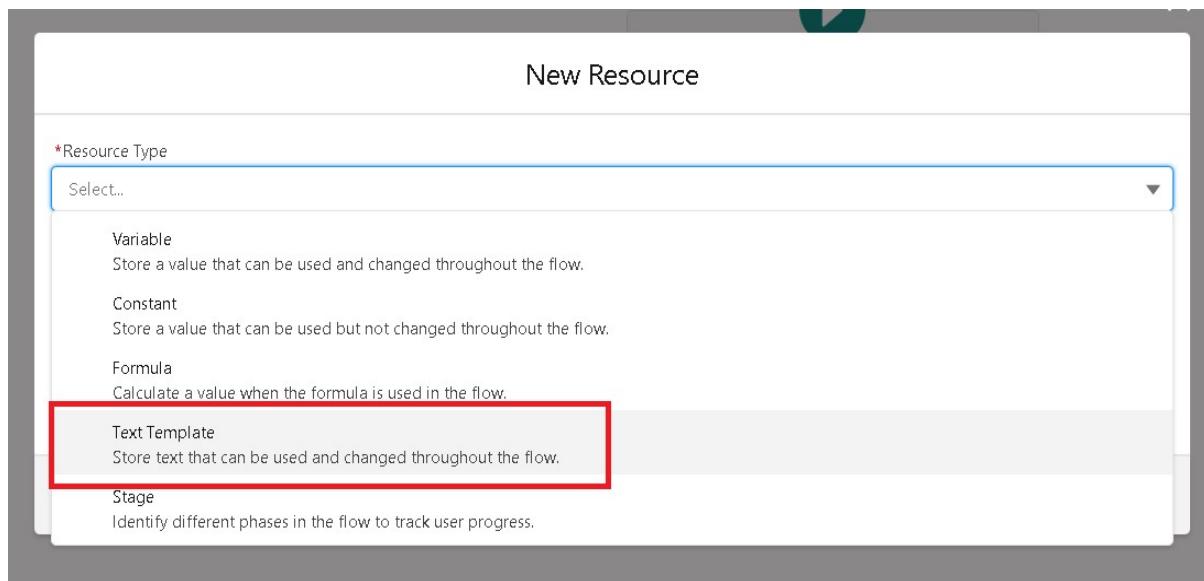
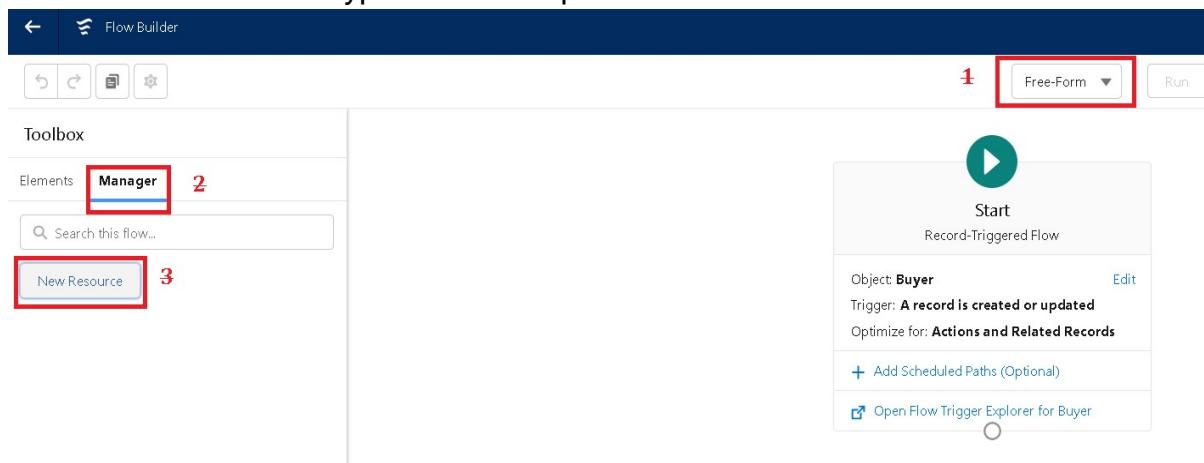


3. Select the Object as a “buyer” in the Drop down list.
4. Select the Trigger Flow when: “A record is Created or Updated”.
5. Select the Optimize the flow for: “Actions and Related Records” and Click on

Done.



6. Now change the mode form Auto-layout to free-form.
7. Now select the manger option in toolbox, click New resource.
8. Select the resource type as text template.



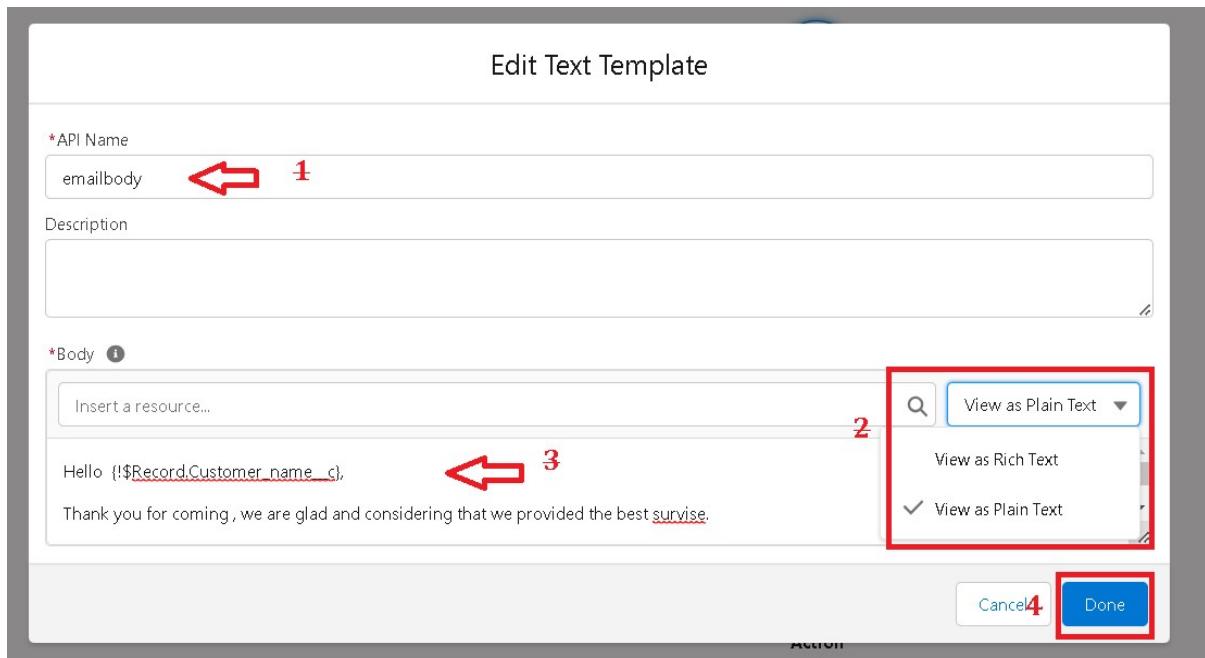
9. Enter the API name as "emailbody".

10.In body field paste the syntax that 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 then View to Plain Text.

12.Click done.



13.Now click on elements, and drag the action element into the preview pane.

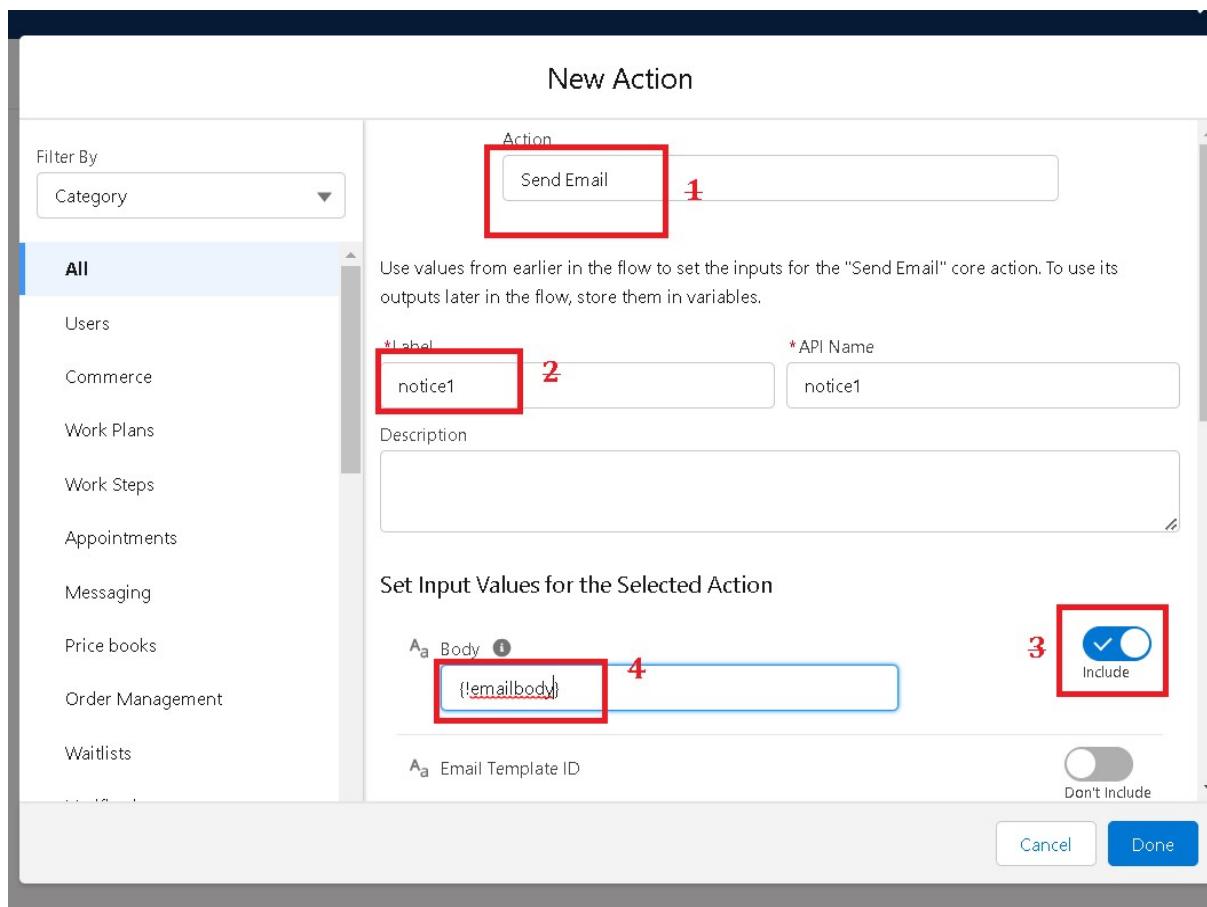
14.Their action bar will be opened in that search for “ send email ” and click on it.

15.Give the label name as “ notice”

16.API name will be auto populated.

17.Enable the body in set input values for the selected action.

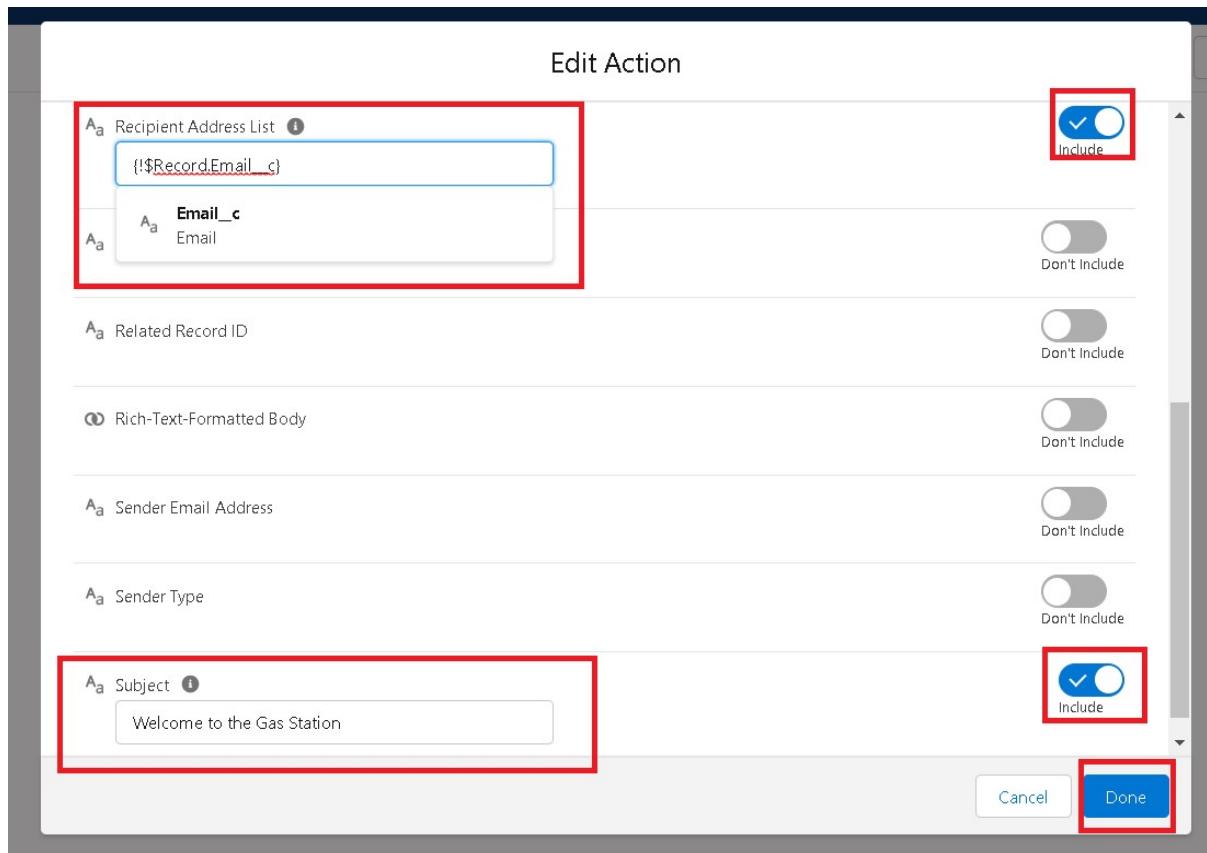
18.Select the text template that created.



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

20. Include subject as " welcome to gas station".

21. Click done.



22.Now drag the path form the start to action element.

23.Click on save. Give the Flow label , Flow Api name will be autopopulated.

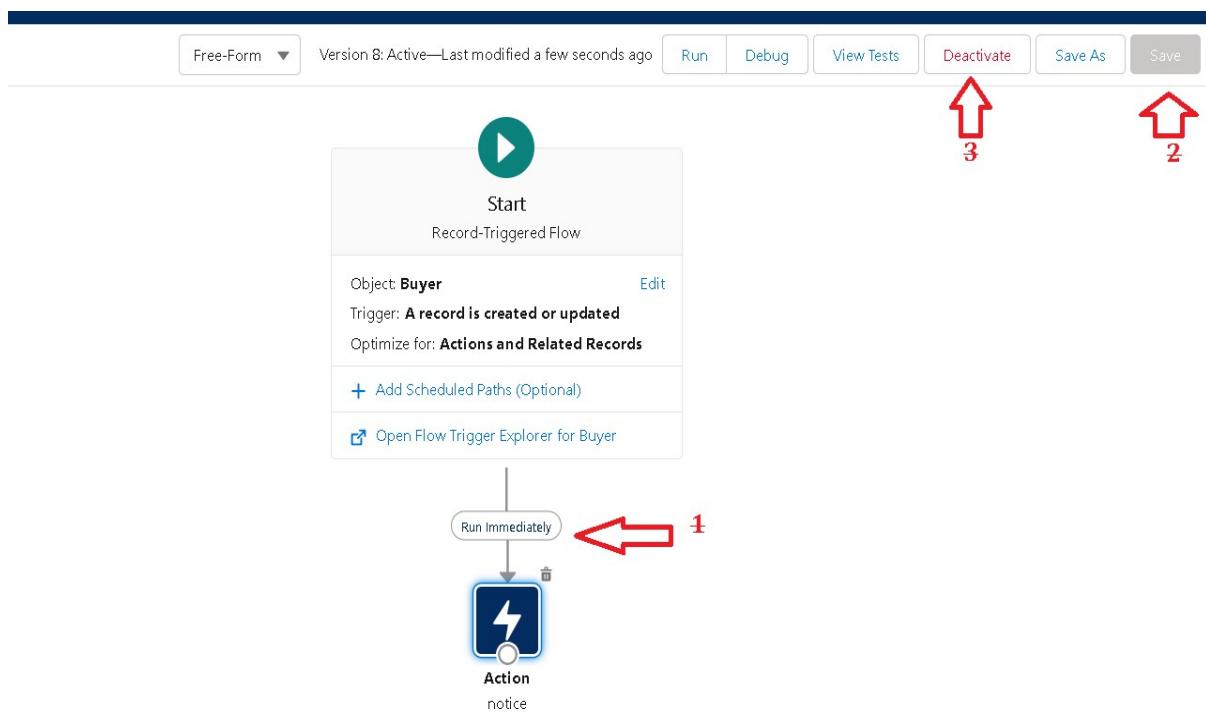
24.And click save, and click on activate.

Save the flow

*Flow Label *Flow API Name
Description

Show Advanced

Cancel Save



16.CONCLUSION

In conclusion, the Gas Filling Store CRM Application is a powerful and tailored solution aimed at enhancing both customer satisfaction and operational efficiency within the gas filling industry. By leveraging CRM strategies, the application addresses the specific needs of gas filling stores, offering a user-friendly and feature-rich platform that simplifies processes, improves customer relationships, and ultimately drives better business outcomes.