

Salesforce Overview and Guide to Customizing for Gas Stations

Introduction

Hey there! New to Salesforce? Not sure what it is or how to use it? Don't worry, we've got you covered. This guide will break it all down for you. Salesforce is a cool tech that helps businesses sell better and work smarter. We'll walk you through what Salesforce is, its main features, and how you can use Salesforce CRM (Customer Relationship Management) to run gas stations more .

What Is Salesforce?

Salesforce helps businesses succeed by letting them sell, serve, market, analyze, and connect with customers better. It gives you everything to run your business from anywhere, thanks to its cloud platform. With Salesforce, you can:

- Keep track of relationships with potential and current customers.
- Work together and interact with employees and partners.
- Keep your business data safe.

Objects in Salesforce

What Is an Object?

Salesforce objects are database tables that hold specific data for a company. They play a key role to organize and access data in Salesforce.

Types of Salesforce Objects:

1. **Standard Objects:** Salesforce gives you ready-made objects like Users, Contracts, Reports, and Dashboards.
2. **Custom Objects:** You make these objects yourself to store data specific to your organization. Custom objects help you tailor Salesforce to fit your business needs.

Creating Custom Objects for Gas Stations

Step-by-step guide to create objects:

1. **Supplier Object**
 - Go to **Setup** → **Object Manager** → **Create** → **Custom Object**.
 - Label: Supplier Plural Label: Suppliers Record Name: Supplier Name (Data Type: Name)
 - Turn on "Allow Reports" and "Track Field History" options.
 - Save the object.
2. **Gas Station Object**
 - Make a new custom object called **Gas Station**.

- Record Name: Gas Station (Data Type: Auto Number Format: Gas-{000} Starting number: 1).
 - Turn on "Allow Reports" and "Track Field History" options.
 - Save the object.
3. **Buyer and Fuel Details Objects**
- For Buyer: Label: Buyer, Plural Label: Buyers, Display Format: Buyer-{000}.
 - For Fuel Details: Label: Fuel Details, Plural Label: Fuel Details, Display Format: Fuel-{000}.

Tabs in Salesforce

What Is a Tab?

A **Tab** in Salesforce serves as a user interface component that gives users the ability to create, view, and handle records for objects.

Types of Tabs:

1. **Custom Tabs:** These provide custom user interfaces to manage custom objects.
2. **Web Tabs:** These show web content within Salesforce.
3. **Visualforce Tabs:** These display Visualforce pages within Salesforce.
4. **Lightning Component Tabs:** These add Lightning components to the navigation.
5. **Lightning Page Tabs:** These add Lightning Pages to the mobile app navigation.

Creating Custom Tabs for Gas Stations

1. Go to **Setup** → Type "Tabs" in the Quick Find Bar → **Custom Object Tabs**.
2. Pick the object, like Supplier, Gas Station, Buyer, or Fuel Details.
3. Select the tab style and save.

Making a Lightning App for Gas Stations

A **Lightning App** groups objects, tabs, and tools to perform a specific business task. You can brand it with custom colors and logos making it easy to access objects such as Suppliers and Gas Stations.

How to Make a Lightning App:

1. Head to **Setup** → Look for "App Manager" → Hit **New Lightning App**.
2. Name your app: **Gas Station**.
3. Include navigation items (Supplier, Gas Station, Buyer Receipt).
4. Pick user profiles (System Administrator) and save.

Fields in Salesforce

Field Types:

1. **Standard Fields:** Built-in fields in Salesforce such as Created By, Owner, and Last Modified.

2. **Custom Fields:** Fields users make to store specific business data.

Making a Junction Object and Master-Detail Relationship

Junction Object

A **Junction Object** lets you connect two objects with many-to-many relationships. Here, we'll set up a junction object to link **Fuel Details**, **Supplier**, and **Gas Station**.

1. Go to **Object Manager** → Edit **Fuel Details** object.
2. Make a new **Master-Detail relationship** with Supplier.
3. Do the same for Gas Station.

Master-Detail Relationship

Master-detail relationships connect two objects. The master object controls how the detail object behaves. To set up a master-detail relationship between Buyer and Gas Station:

1. Go to **Object Manager** → Edit **Buyer** object → Make a new **Master-Detail Relationship** with Gas Station.

Formulas and Roll-up Summary Fields

Creating Formula Fields

1. **Gas Station Object:** Make a formula field called **Fuel Available in Bunk** to figure out how much fuel is on hand. Use this formula: `Fuel_supplied_to_bunk__c - Fuel_Used__c`.
2. **Buyer Object:** Set up a formula field named **Customer Name** to join first and last names. The formula for this is `First_Name__c + ' ' + Last_Name__c`.

Roll-up Summary Fields

A roll-up summary field has an influence on data from a child object to a parent object. It uses functions like COUNT, SUM, MIN, and MAX. You might use it to sum up all the fuel given to a gas station or supplier.

1. Go to **Object Manager** → Change the **Supplier** object.
2. Make a roll-up summary field to add up the total fuel supplied.
3. Do the same for the Gas Station object.

Picklists, Validation Rules, and Page Layouts

Picklist Fields

Picklists let users pick values from a set list. For instance, you can create picklist fields such as **Vehicle Type** and **Mode of Payment** on the Buyer object.

Validation Rules

Data accuracy has a direct link to validation rules. Take the Buyer object as an example. A rule to check the phone number format uses this formula: `NOT (REGEX (Phone_Number__c , "[6-9]{1}[0-9]{9}"))`.

Page Layouts, Profiles, and Permission Sets

Page Layouts

Page layouts let you tailor the design and structure of detail and edit pages for Salesforce records. You can position fields related lists, and custom links on both standard and custom objects.

Profiles and Permission Sets

A profile has control over what a user can do, like accessing objects, fields, and tabs. Salesforce gives you standard profiles (for example, System Administrator) and custom profiles. Permission sets give users extra permissions without changing their profile.

OWD (Organization-Wide Defaults) Setup

OWD sets the default access level for your Salesforce data. You have four levels to choose from:

1. **Public Read/Write/Transfer**
2. **Public Read/Write**
3. **Public Read/**
4. **Private**

Reports and Dashboards

Salesforce lets you analyze and visualize data with **Reports** and **Dashboards**.

Types of Reports:

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

Dashboards show live data from reports . This helps users keep an eye on important numbers and patterns.

Flows in Salesforce

Flows make business processes run on their own and guide users through steps or screens. People can create them using a visual tool without knowing how to code.

2. Problems Gas Stations Face

- Bad customer management and service tracking.
- Hand-recorded fuel sales and inventory tracking.
- No up-to-date view of business operations and results.
- Difficulty in assessing staff performance.
- Poor decisions due to limited data.

3. Goals for Salesforce CRM

The purpose of implementing Salesforce CRM at gas stations is to:

- Automate customer interactions and enhance customer service.
- Monitor and control fuel inventory.
- Streamline sales processes and track transaction records.
- Monitor station performance using real-time reports and dashboards.
- Support management in making data-driven decisions.
- Improve staff management.

4. Main Features and Functions

4.1 Customer Management and Support

- **Customer Accounts:** Create Salesforce profiles for each customer. Track their contact information, purchase history, and preferences.
- **Service Requests and Cases:** log customer complaints or inquiries. Route them to the appropriate team and ensure their resolution.
- **Loyalty Programs:** Use the CRM to manage customer loyalty programs special deals, and sales.

4.2 Fuel Inventory Management

- **Inventory Tracking:** Create custom objects in Salesforce to monitor changing fuel levels, log purchases from suppliers, and trigger alerts when stock runs low.
- **Automatic Reordering:** Set up workflow rules to initiate reordering when fuel falls below a certain threshold.
- **Vendor Management:** Track interactions with fuel suppliers, contracts, and order history.

4.3 Sales and Transaction Management

- **Transaction Logging:** Record daily sales transactions linking them to customer accounts when possible.
- **Payment Integration:** Salesforce add-ons connect payment systems to ensure smooth transactions.
- **Sales Reporting:** Custom reports track , weekly, or monthly sales figures providing a clear overview of business revenue.

4.4 Workforce Management

- **Employee Scheduling:** Custom apps or third-party tools assist in managing staff shifts and tracking time.
- **Performance Tracking:** Sales data and customer feedback in Salesforce offer insights into employee performance.

4.5 Real-Time Reporting and Analytics

- **Dashboards:** Live displays show fuel stock levels, sales figures, and station performance metrics.
- **Custom Reports:** Breakdowns show customer data, fuel usage trends, and operational performance.
- **KPIs Monitoring:** The system tracks key metrics like average daily sales, fuel turnover rate, and customer satisfaction.

5. Integration with External Systems

- **POS Systems:** Salesforce links to Point of Sale (POS) systems to record sales information.
- **Accounting Tools:** The platform connects to accounting software (such as QuickBooks) to manage financial records including expenses, earnings, and tax data.
- **Supplier Portals:** It interfaces with external supplier platforms to buy and track fuel inventory.

6. Automation through Salesforce Admin Tools

6.1 Workflow and Approval Processes

- Create automatic workflows for employee requests, fuel reorders, and customer case escalations.
- Design approval processes so higher management can check large transactions or big inventory purchases.

6.2 Custom Objects and Fields

- Build custom objects to track station-specific data like fuel types, dispenser efficiency, and environmental compliance.
- Add custom fields to existing objects to monitor more data points such as fuel prices or special offers.

6.3 Security and Access Controls

- Implement role-based access controls to ensure authorized staff can view sensitive info like financial records or customer data.
- Use Salesforce's built-in encryption and data security features to protect essential business information.

7. Implementation Strategy

7.1 User Training and Adoption

- Develop a training program to educate employees and managers on how to incorporate Salesforce into their daily operations.
- Provide continuous support and educational resources to improve skills.

7.2 Phased Rollout Plan

- **Phase 1:** Implement customer and inventory management.
- **Phase 2:** Establish sales and transaction tracking.
- **Phase 3:** Implement workforce management and reporting.
- **Phase 4:** Integrate with POS and external systems.

8. Expected Business Impact

- **Better Operations:** Automation has an impact on reducing manual tasks and errors.
- **More Sales:** Monitoring customer relationships and loyalty programs contributes to customer retention.
- **Clear Data View:** Key metrics and performance indicators are visible in real-time.
- **Smarter Choices:** Data utilization enhances strategic planning.

9. To Sum Up

Integrating Salesforce CRM into gas station operations can boost their efficiency, customer service, and overall performance. Through automation of crucial processes, system integration, and real-time data visibility, the gas station will be well-positioned to expand and adapt to future business challenges.

Conclusion

Salesforce is a comprehensive customer relationship management (CRM) platform designed to help businesses manage their sales, service, marketing, and analytics processes effectively. It provides a wide range of tools to enhance productivity and streamline business operations. By utilizing standard and custom objects, businesses can store and manage data unique to their organization.

Through features like custom tabs, junction objects, master-detail relationships, roll-up summary fields, and formula fields, users can organize data and automate various business processes. Lightning apps and flows further enhance efficiency by providing easy navigation and automating routine tasks.

With robust customization options, including profiles, roles, permission sets, and organization-wide defaults (OWDs), Salesforce enables organizations to control access and manage security for their data. Reporting and dashboards allow businesses to analyze and visualize data, helping to make informed decisions.

Overall, Salesforce empowers users to manage customer relationships and business processes from anywhere, fostering customer success and driving business growth.