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

PROJECT DOCUMENTATION:

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.

SALESFORCE:

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

Creating Developer Account:

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

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

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.

Create Supplier Object

To create an object:

- From the setup page ? Click on Object Manager ? Click on Create ? Click on Custom Object.
- Enter the label name? Supplier
- Plural label name? Suppliers
- Enter Record Name Label and Format
- Record Name ? Supplier Name

- Data Type ? Name
- Click on Allow reports and Track Field History,
- Allow search ? Save.

Create Gas Station Object

To create an object:

- From the setup page ? Click on Object Manager ? Click on Create ? Click on Custom Object.
- Enter the label name? Gas Station
- Plural label name? Gas Stations
- Enter Record Name Label and Format
- Record Name ? Gas Station
- Data Type ? Auto Number
- Display Format ? Gas-{000}
- Starting number ? 1
- Click on Allow reports and Track Field History,
- Allow search ? Save.

Create Buyer and Fuel details Objects

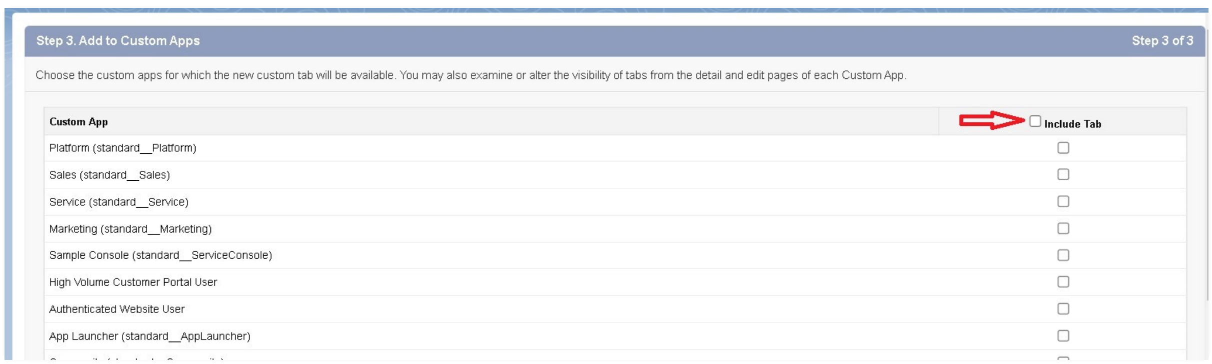
- label name ? Buyer
- Plural label name ? Buyers
- Display Format ? Buyer-{000}
- Starting number ? 1
- Use these display format for the Fuel details
- label name ? Fuel details
- Plural label name ? Fuel details
- Display Format ? fuel-{000}
- Starting number ? 1

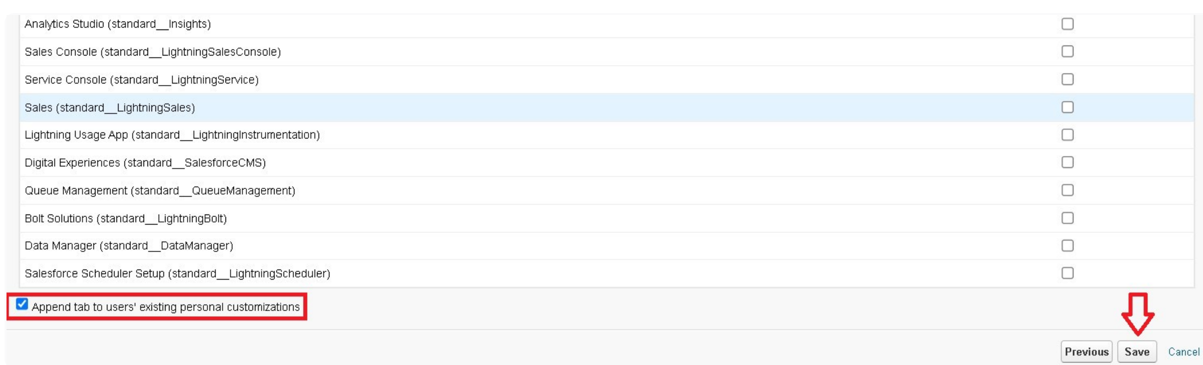
Creating a Custom Tab

To create a Tab:(supplier)

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

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





Creating Remaining Tabs

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

The Lightning App

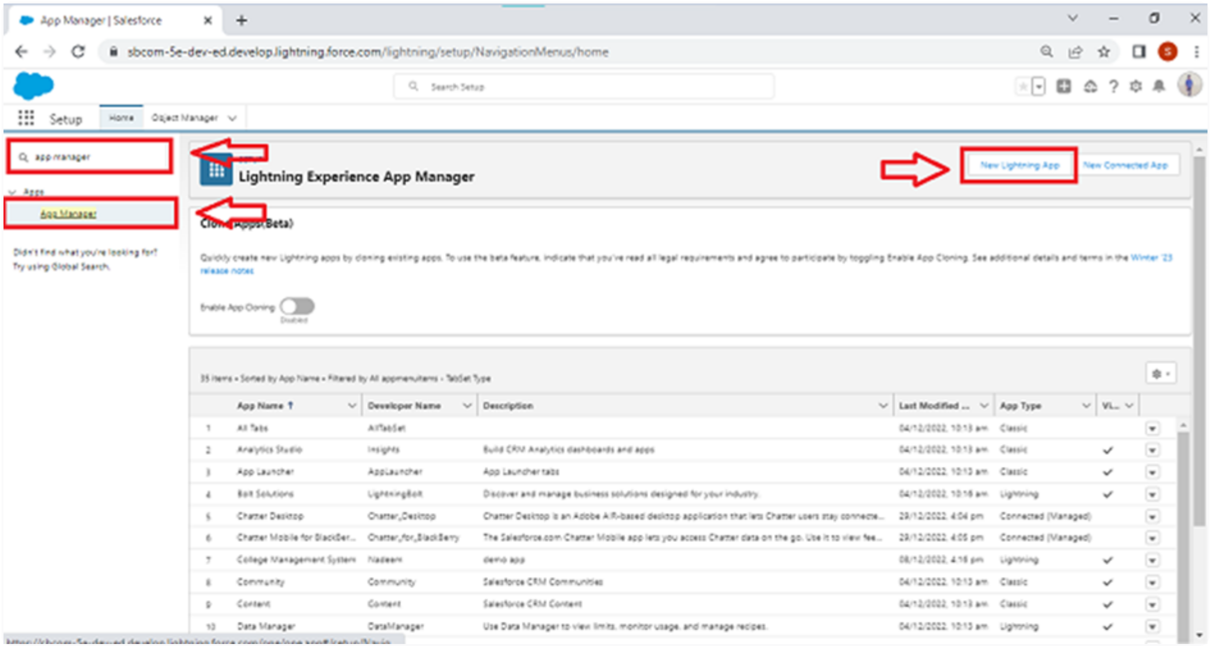
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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.

Create a Lightning App

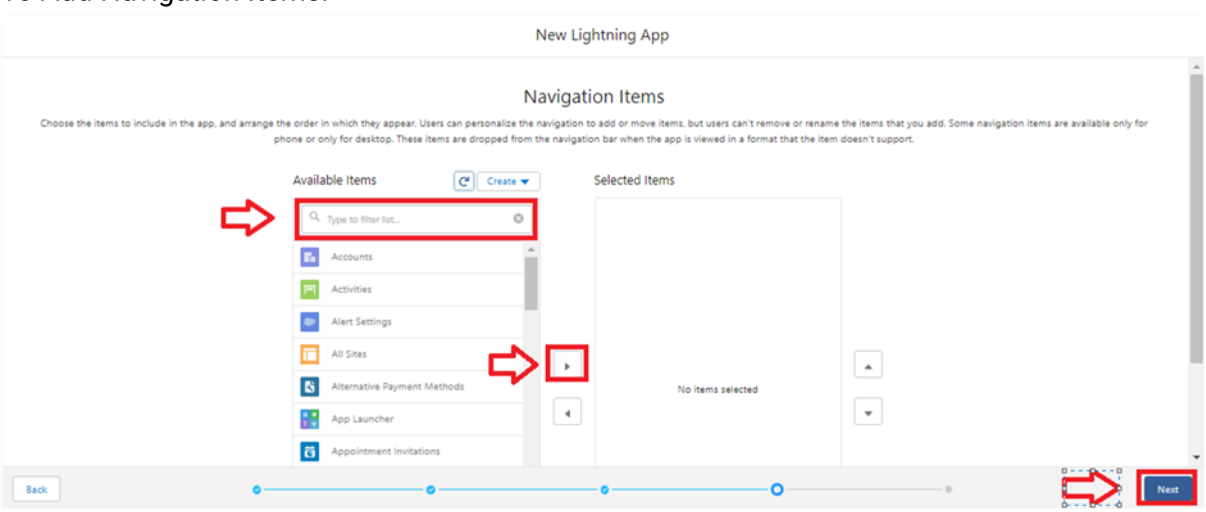
To create a lightning app page:

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



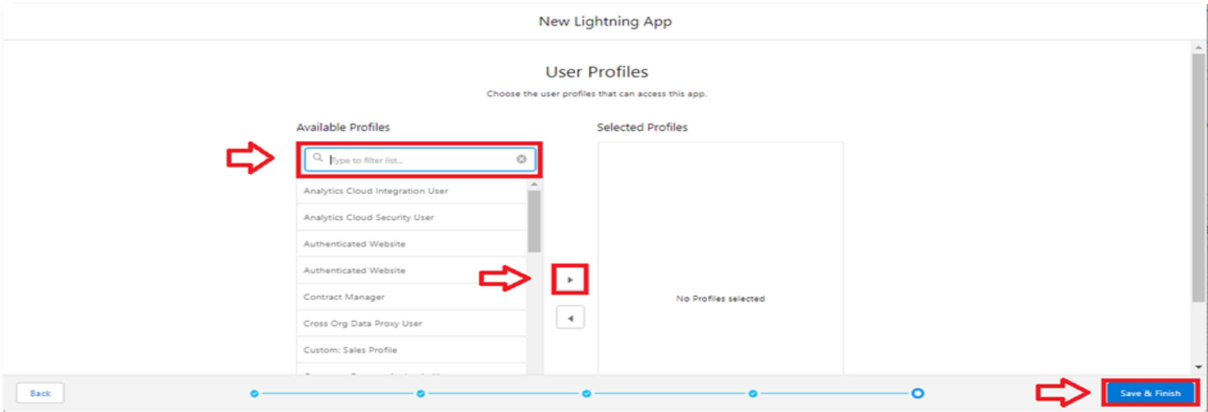
- Fill the app name in app details as GAS STATION ?Next ? (App option page) keep it as default ? Next ? (Utility Items) keep it as default ? Next.

To Add Navigation Items:



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

To Add User Profiles:



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

<u>Fields</u>

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

Now,create all fields that are shown in the below table!!

s.no	Object name	Fields	
1	Fuel details	Field Name	Data type
		Fuel supplied	number
		Supplier name	Master details
		Gas station	Master details
2	Supplier	Sum of fuel supplied	Rollup summary (Fuel detail object)
3	Gas station	Fuel supplied to bunk	Rollup summary (Fuel detail object)
		Fuel Price/litre	Number (length = 5)
		Fuel used	Rollup summary

4	Buyer		
		First name	Text
		Last name	Text
		Customer name	Formula
		Phone number	phone
		email	email
		Fuel filled in vehicle	Number (length = 5)
		Vehicle type	picklist values • Two wheeler • Three wheeler • Four wheeler • Six wheeler • Eight wheeler • others
		Mode of payment	Picklist values • Credit card • Debit card • Net banking • UPI • Cash
		Amount paid	Formula

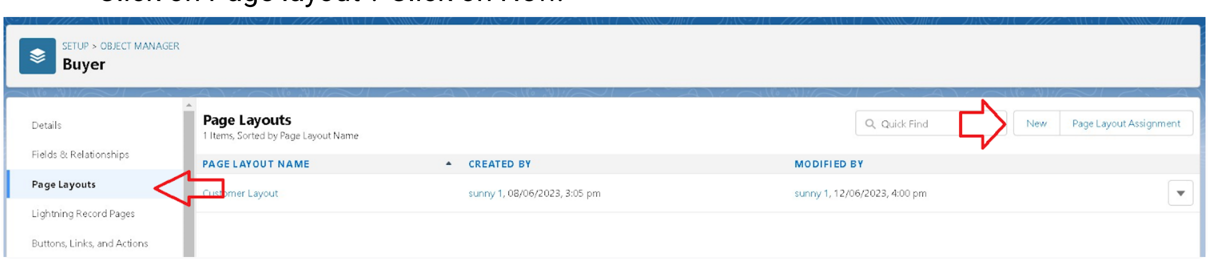
Page layouts

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.

creating the page layout

To Create a Page layout:

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



- Select the existing page layout, and give the page layout name as “customer layout”, and click save.
- Drag and drop the section field to Buyer details and create the section.

- Enter the section name as “Persoanl details”, ? click Ok.
- Now drag the fields to this section that mentioned , they are

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

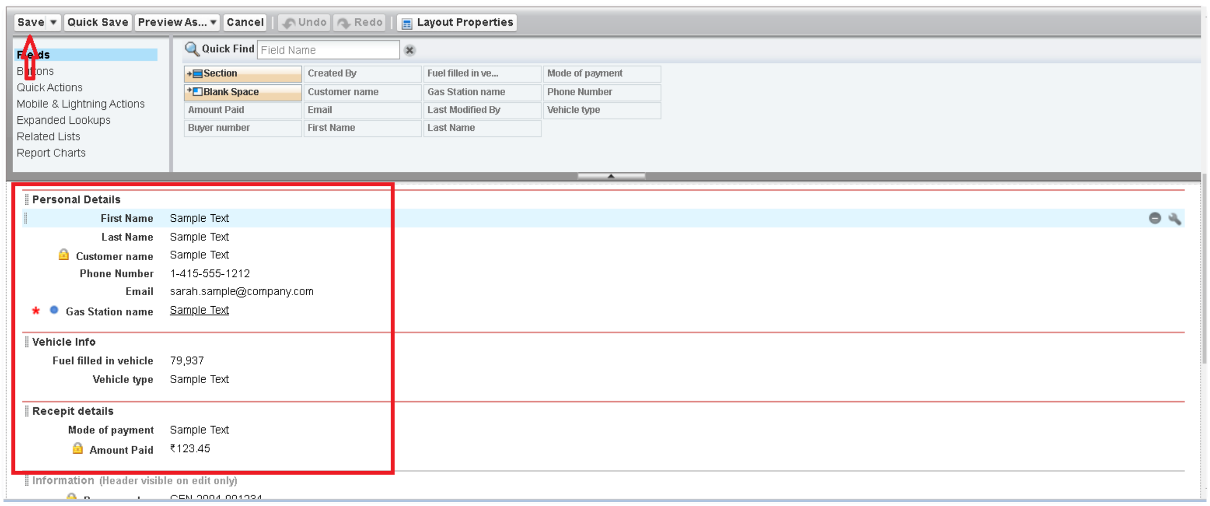
- Follow the same process for another two sections as shown above , they are
- One section is “ vehicle info ” , drag the fields that are

Fuel filled in vehicle, vehicle type.

- Another section is “Recepit details ”, and drag the fields that are

Mode of payment , Amount paid.

- Then , Click save.



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.

Manager Profile

To create a new profile:

- Go to setup ? type profiles in quick find box ? click on profiles ? clone the desired profile (Standard User) ? enter profile name (Manager) ? Save.
- While still on the profile page, then click Edit.
- Select the Custom App settings as default for the Gas station.
- 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.
- Change the session times out after should be “ 8 hours of inactivity”.
- Change the password policies as mentioned :
- User passwords expire in should be “ never expires ”.
- Minimum password length should be “ 8 ”, and click save.

sales executive Profile

- Go to setup ? type profiles in quick find box ? click on profiles ? clone the desired profile

(Salesforce Platform User) ? enter profile name (sales executive) ? Save.
- While still on the profile page, then click Edit.
- Select the Custom App settings as default for the Gas station.
- 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.
- And click save.

sales person Profile

- Go to setup ? type profiles in quick find box ? click on profiles ? clone the desired profile (Salesforce Platform User) ? enter profile name (sales person) ? Save.
- While still on the profile page, then click Edit.
- Select the Custom App settings as default for the Gas station.
- 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.
- And click save.

Role & Role Hierarchy

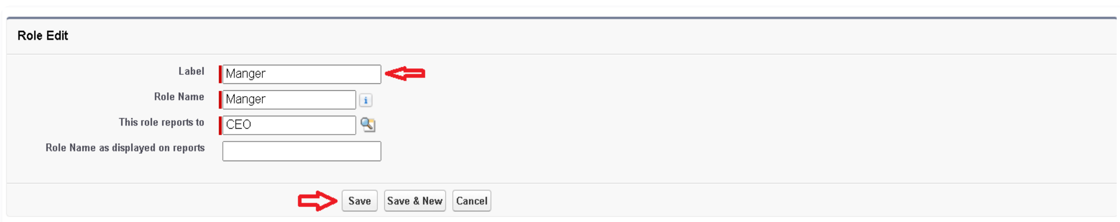
A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Creating Manager Role

Creating Manager Role:

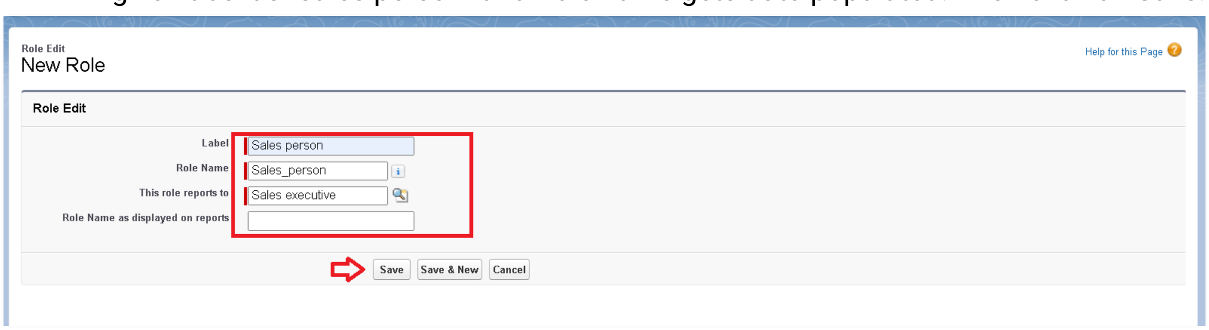
- Go to quick find ? Search for Roles ? click on set up roles.
- Click on Expand All and click on add role under whom this role works.

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



- Creating another roles
- Creating another two roles under manager
- Go to quick find ? Search for Roles ? click on set up roles.
- Click plus on CEO role, and click add role under manager.
- Give Label as “sales executive” and Role name gets auto populated. Then click on Save.
- Repeat the same steps,another role.
- Click plus on CEO role, and click plus on manager, and click add role under sales executive .

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



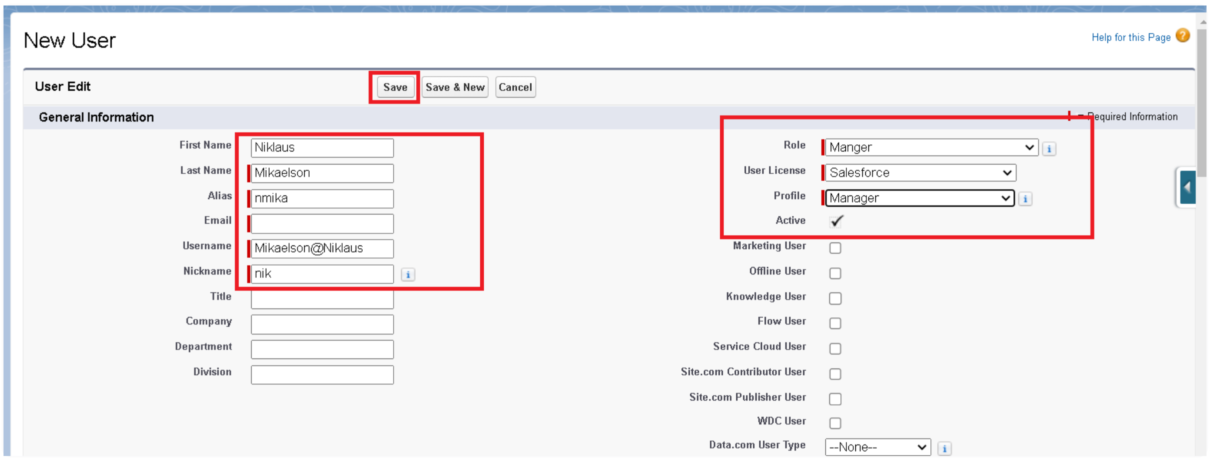
Users

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.

Create User

- Go to setup ? type users in quick find box ? select users ? click New user.

Fill in the fields
First Name : Niklaus
Last Name : Mikaelson
Alias : Give a Alias Name
Email id : Give your Personal Email id
Username : Username should be in this form: text@text.text
Nick Name : Give a Nickname
Role : Manager
User licence : Salesforce
Profiles : Manager



Save.

- creating another users

Follow the same steps from above activity and create another user using
Role : sales executive
User licence : Salesforce Platform
Profile : sales executive

Repeat the steps and create another user using
Role : sales person
User licence : Salesforce Platform
Profile : sales person

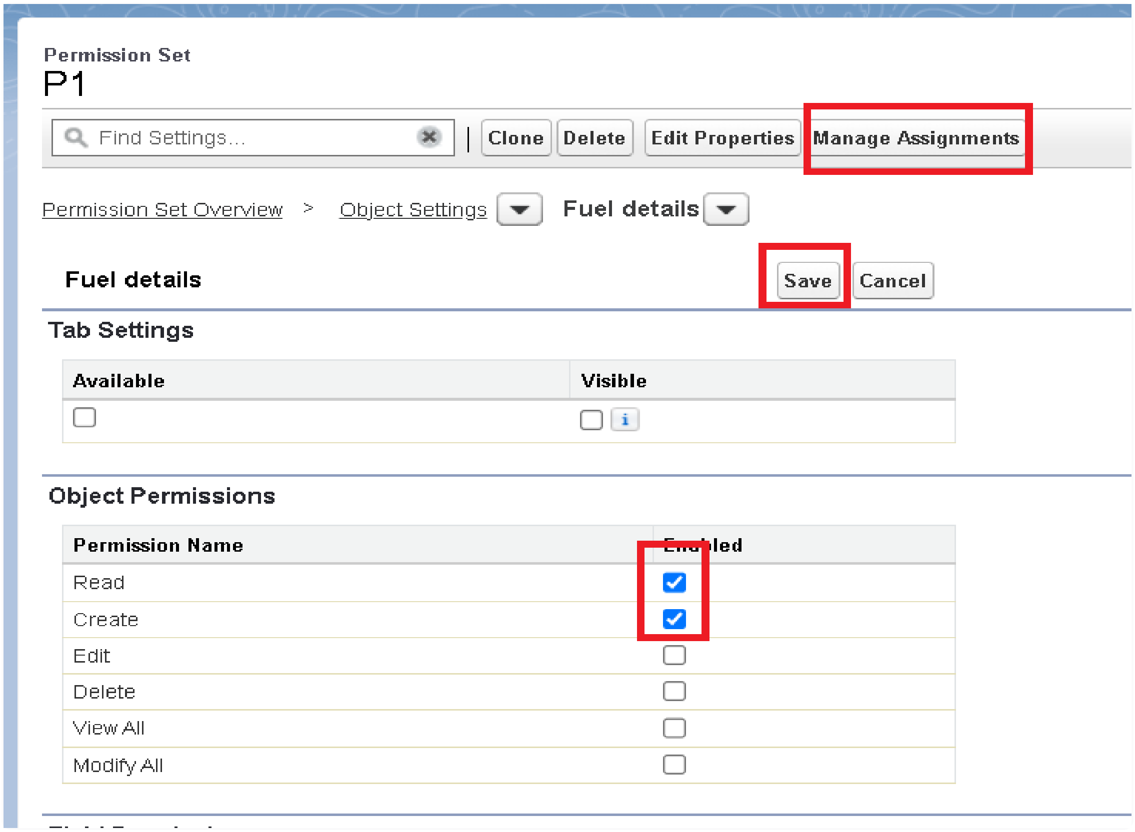
<u>Permission sets</u>

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.

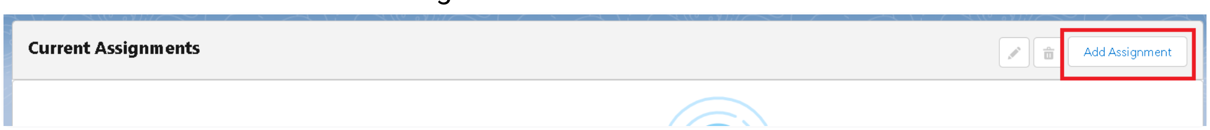
<u>Creating permission set</u>

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.

- Go to setup ? type “permission sets” in quick search ? select permission sets ? New.
- Enter the label name as “P1”, API will be auto populated ? save.
- Under Apps Select object settings.
- Click on Fuel details object ? click on Edit ? under object permission check for read and create.



- Click on Save.
- After saving the permission click on the Manage assignment
- Now click on the Add Assignment.



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

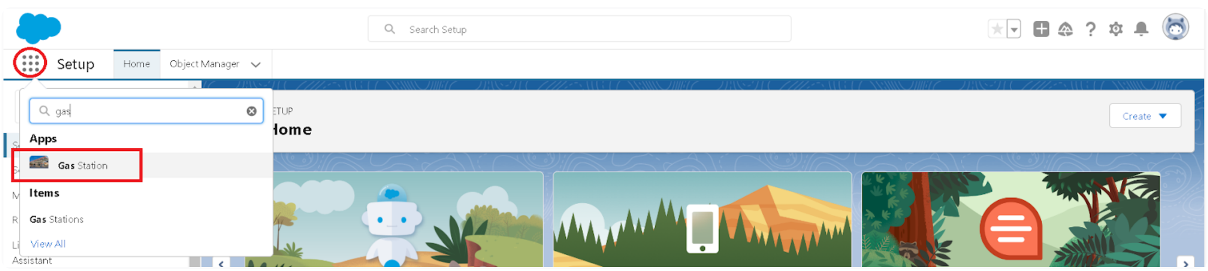
Setup For OWD

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

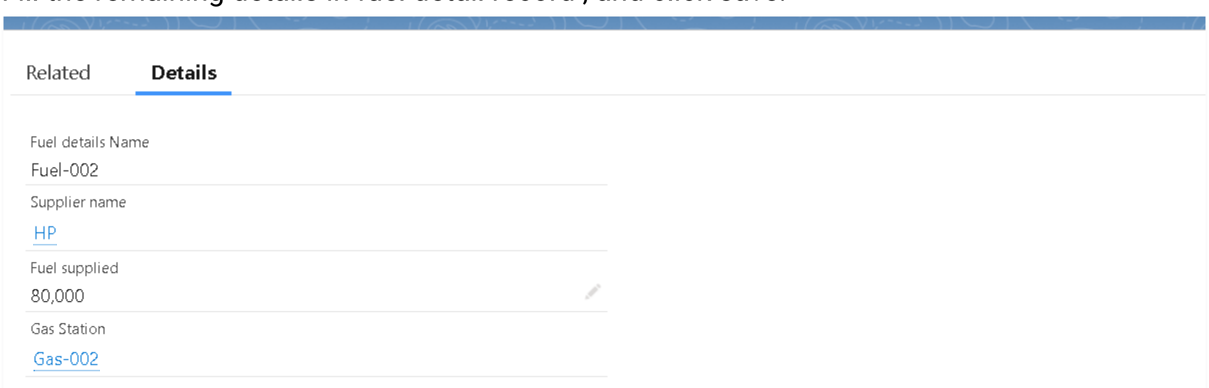
Create OWD Setting

- Go to setup ? type "sharing settings " in quick search ? Click edit.
- Scroll down, change the default internal access to " public read-only" for Gas station and Supplier object.
- Click save.
- To create a record in junction object follow these steps
- Click on the app launcher locate at left side of the screen.
- Search for " Gas station" and click on it.
- Click on " fuel details tab".
- Click on new and fill the details as shown below figs, and click save.



- Creating the supplier record in fuel detail record, by clicking the " new supplier ".
- Fill the details in supplier record and click on save.
- Creating the Gas station record in fuel details record, by clicking on new gas station.
- Fill the details in gas station record, Click save.

Fill the remaining details in fuel detail record , and click save.



Followed by these create 10 more records in Buyer object.

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

Tabular

Summary

Matrix

Joined Reports

create a report folder

Click on the app launcher and search for reports.

Double click on the report, " reports tab" will be autopopulated in navigation bar.

Click on the report tab, click on new folder.

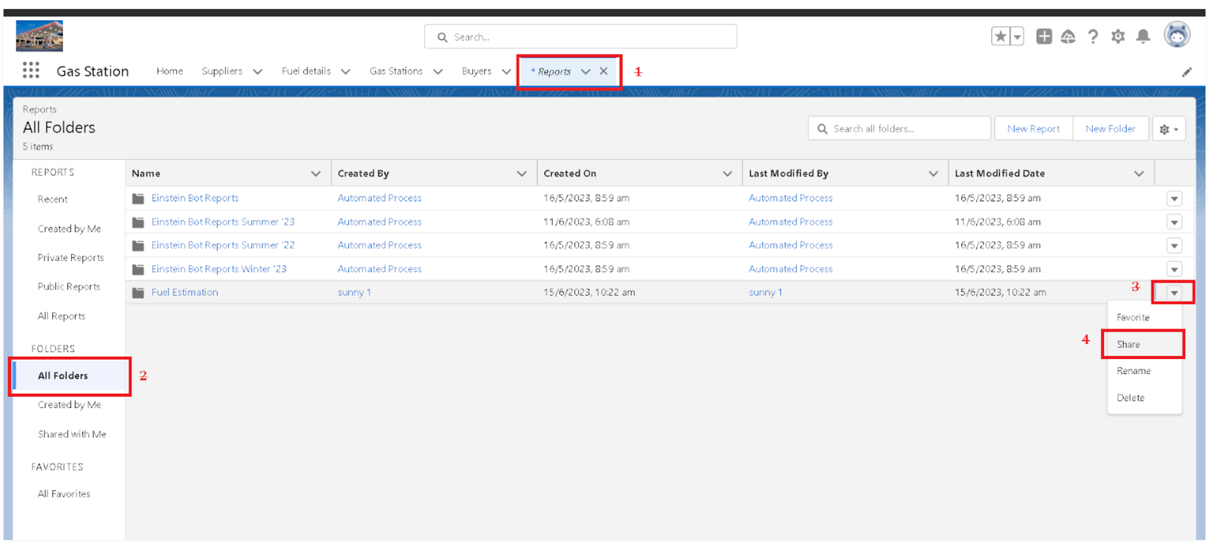
Give the Folder label as "Fuel Estimation ", Folder unique name will be auto populated.

Click save.

Sharing a report folder

Go to the app ? click on the reports tab.

Click on the All folder , click on the arrow for Fuel estimation folder, and Click on share.



Select the share with as "roles", in name field search for "manager", give "view" as access for that role.

Then click share, and click on Done.

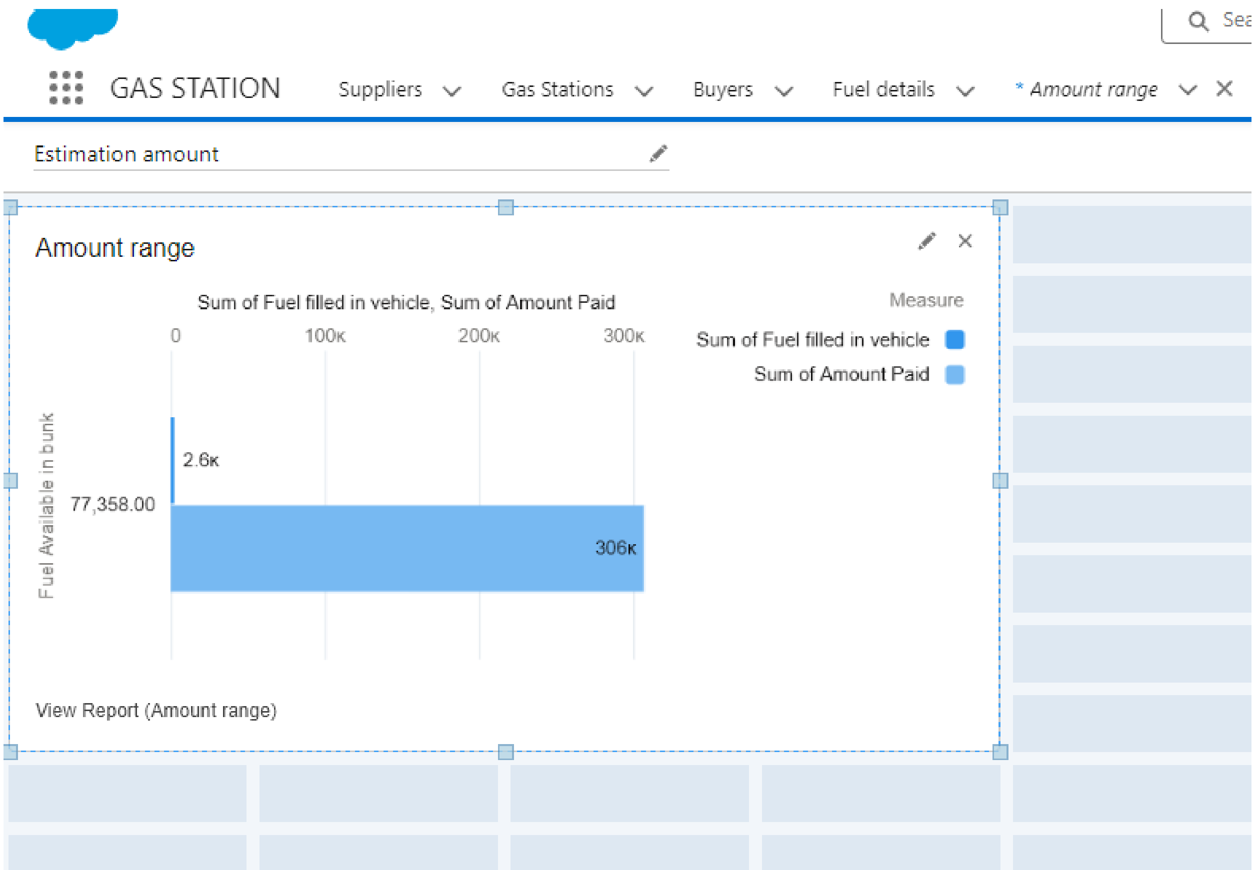
Dashboards

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.

Create Dashboard Folder
Click on the app launcher and search for dashboard.
Click on dashboard tab.
Click new folder, give the folder label as " Amount estimation dashboard".
Folder unique name will be auto populated.
Click save.
Follow the same steps, form milestone 12, and activity 2, and provide the sharing settings for the folder that just created.

Create Dashboard

Go to the app ? click on the Dashboards tabs.
Give a Name and select the folder that created, and click on create.
Select add component.
Select a Report and click on select.
Click Add then click on Save and then click on Done.
Preview is shown below.

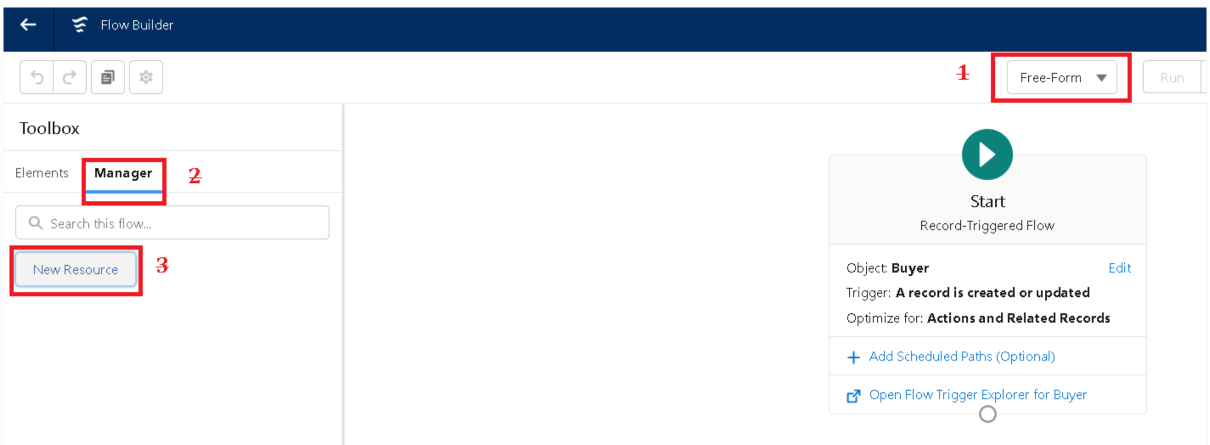


Flows

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.

Create a Flow

Go to setup ? type Flow in quick find box ? Click on the Flow and Select the New Flow.
Select the Record-triggered flow and Click on Create.
Select the Object as a “buyer” in the Drop down list.
Select the Trigger Flow when: “A record is Created or Updated”.
Select the Optimize the flow for: “Actions and Related Records” and Click on Done.
Now change the mode form Auto-layout to free-form.
Now select the manger option in toolbox, click New resource.
Select the resource type as text template.



Enter the API name as “ emailbody”.
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}

Change the view as Rich Text ? View to Plain Text.
Click done.
Now click on elements, and drag the action element into the preview pane.
Their action bar will be opened in that search for “ send email ” and click on it.
Give the label name as “ notice”
API name will be auto populated.

Enable the body in set input values for the selected action.
Select the text template that created.
Include recipient address list select the email form the record.
Include subject as “ welcome to gas station”.
Click done.
Now drag the path form the start to action element.
Click on save. Give the Flow label , Flow Api name will be autopopulated.
And click save, and click on activate.