The Gas Filling Store CRM Application

Developed by:

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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.

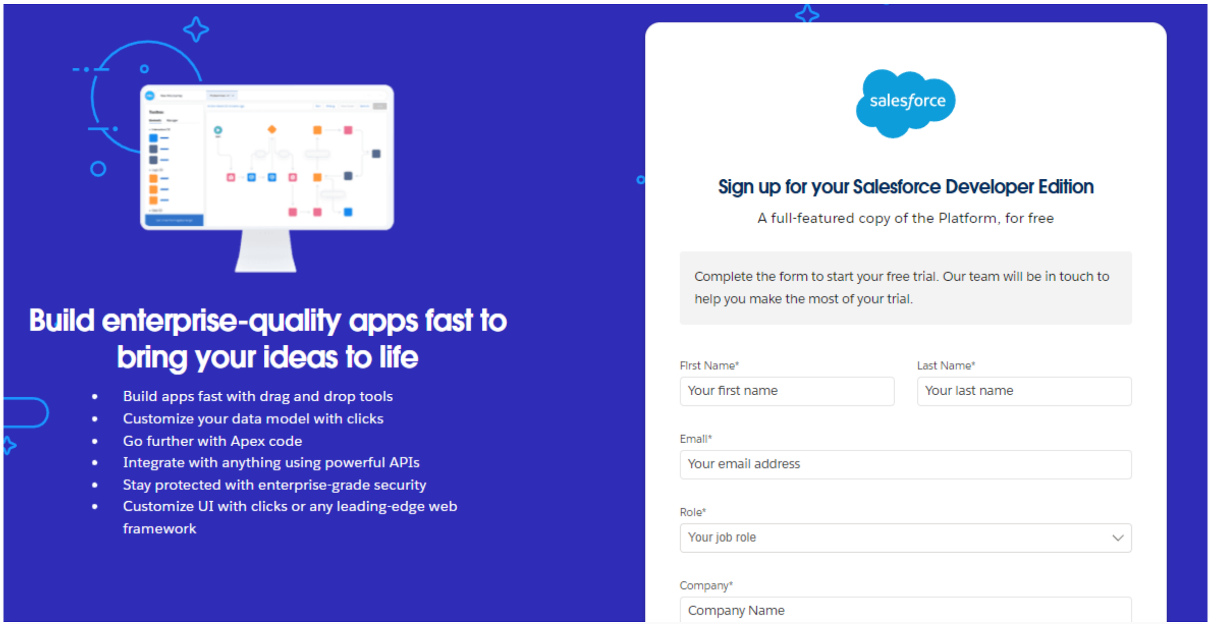
This project aims to develop a user-friendly and feature-rich application that addresses the specific needs of gas filling stores. In addition to core functionalities like customer data management, order tracking, and automated billing, the application can incorporate real-time gas delivery tracking, 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.

INDEX PAGE

1.Creating Developer Account in Salesforce

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

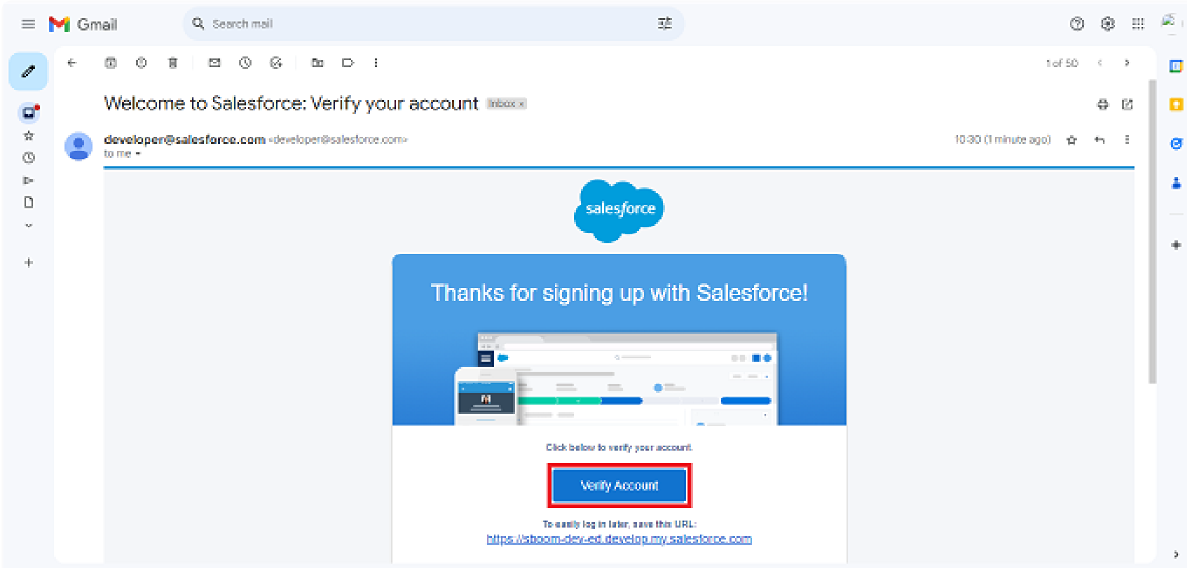


1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code

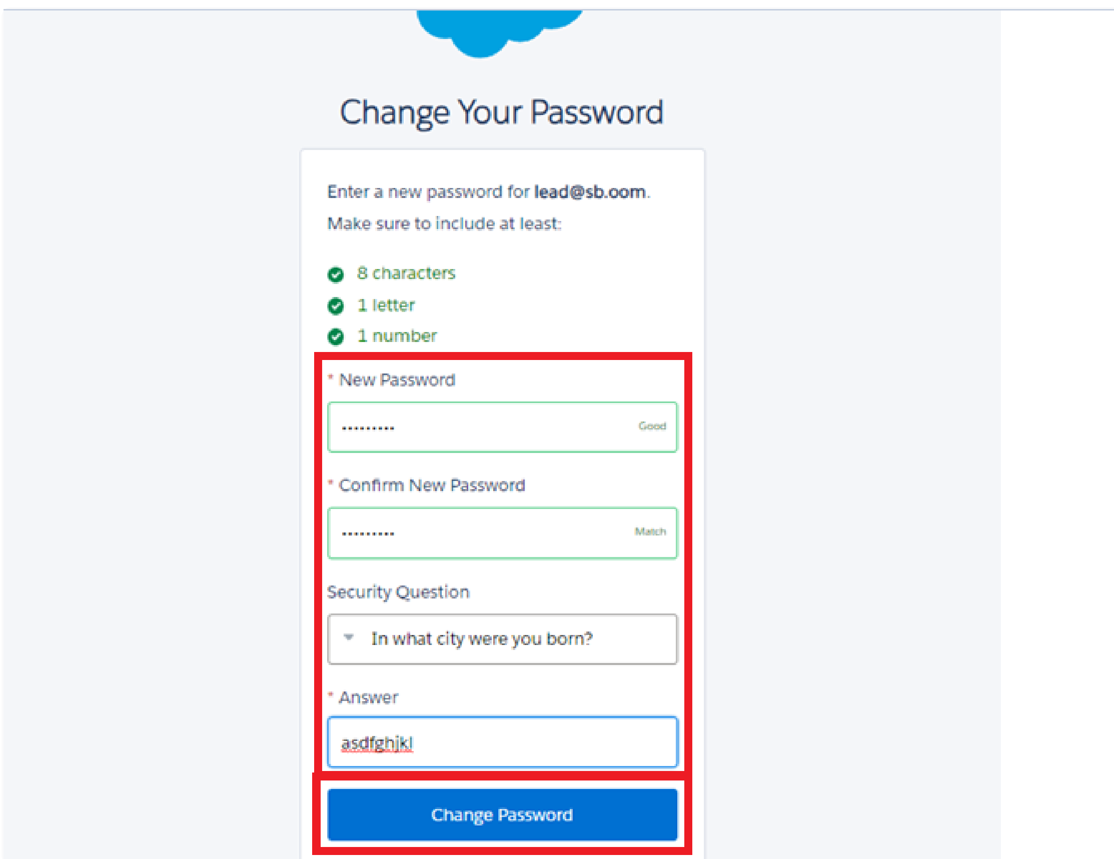
Username : should be a combination of your name and company
This need not be an actual email id, you can give anything in the format :
username@organization.com
Click on sign me up after filling these.

1.1 Account Activation

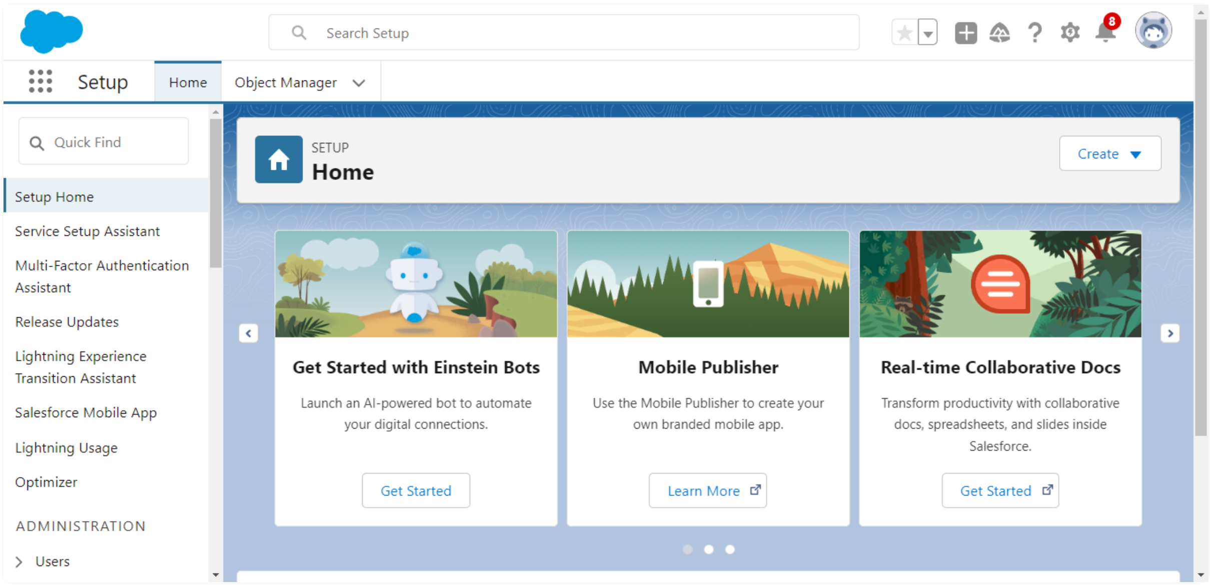
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



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.


Search Setup
8
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.
Get Started
Mobile Publisher
Use the Mobile Publisher to create your own branded mobile app.
Learn More
Real-time Collaborative Docs
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
Get Started

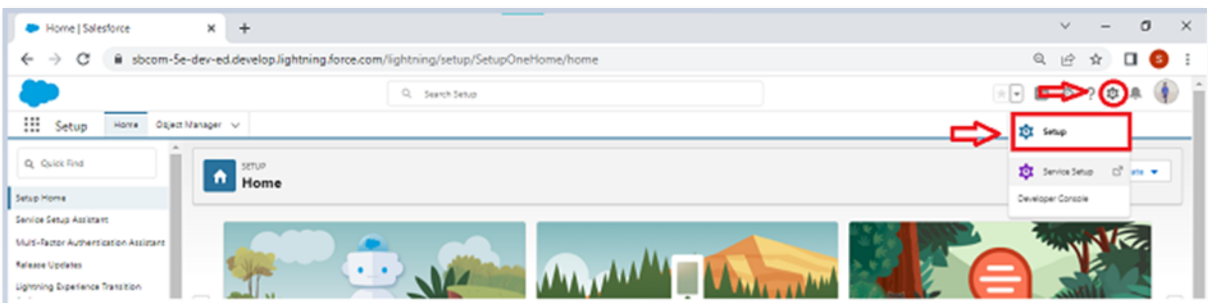
2. Object

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:

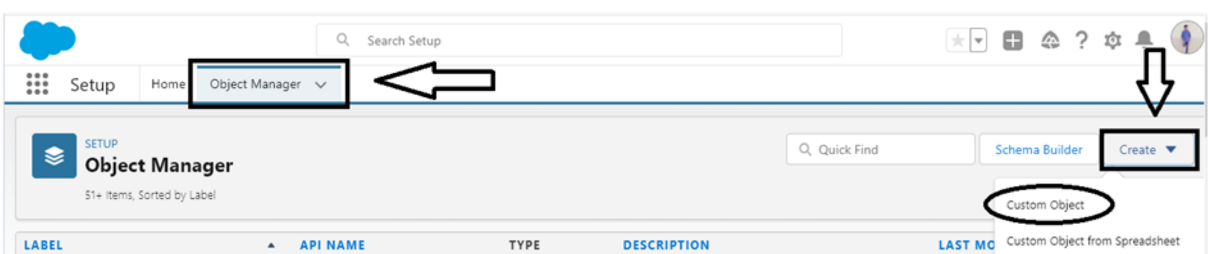
1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization.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

To Navigate to Setup page:
Click on gear icon ? click setup.

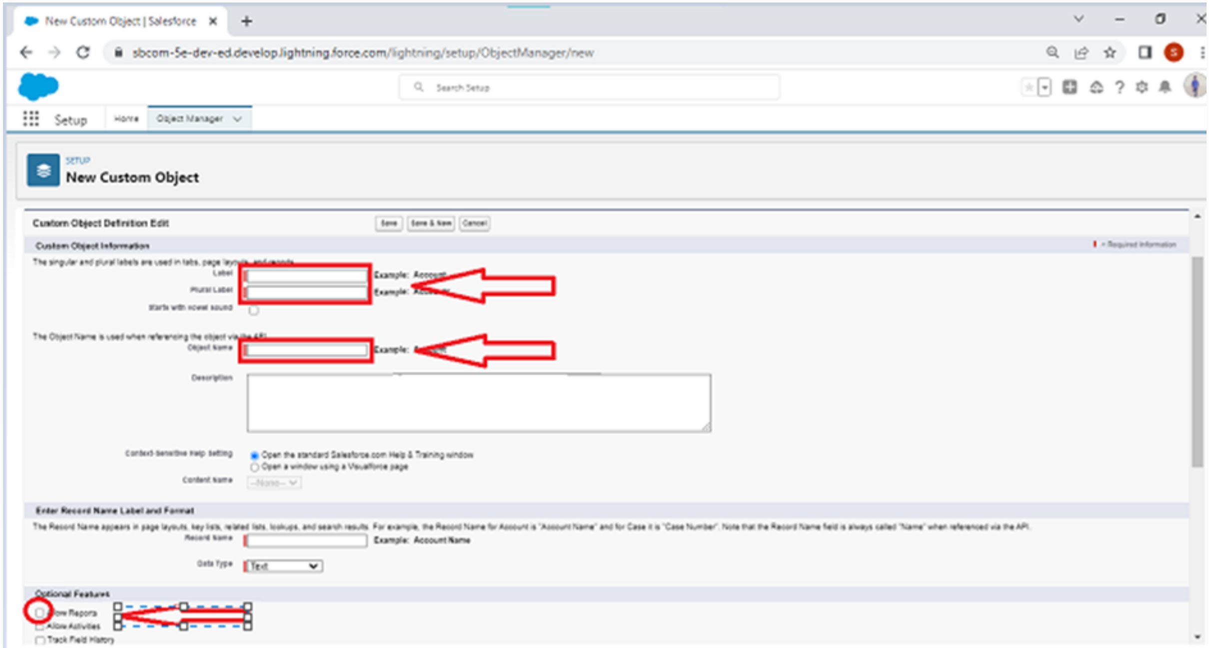


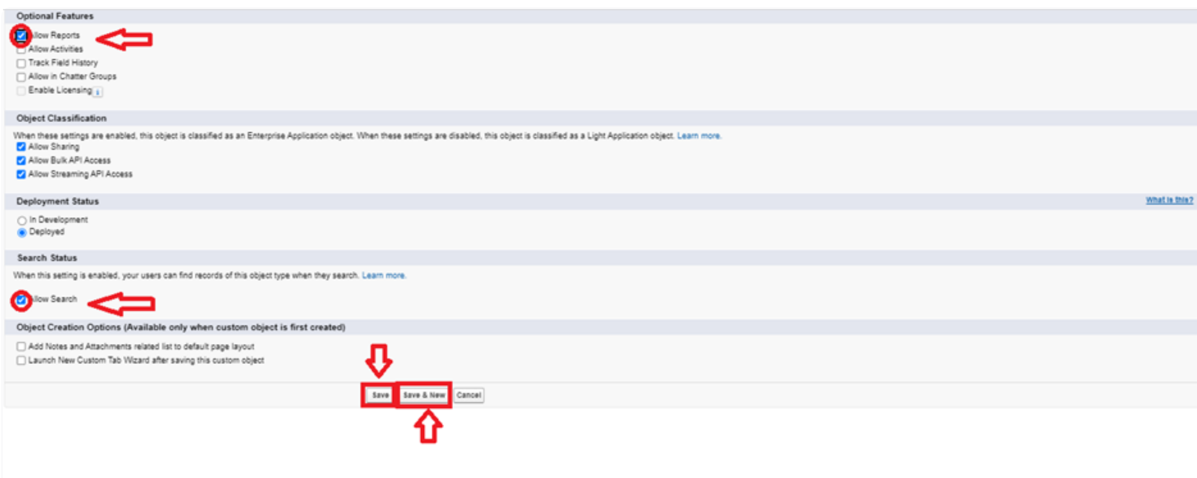
To create an object:

1. From the setup page ? Click on Object Manager ? Click on Create ? Click on Custom Object.



2. On Custom object defining page:
3. Enter the label name, plural label name, click on Allow reports, Allow search.





4. Click on Save.

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.

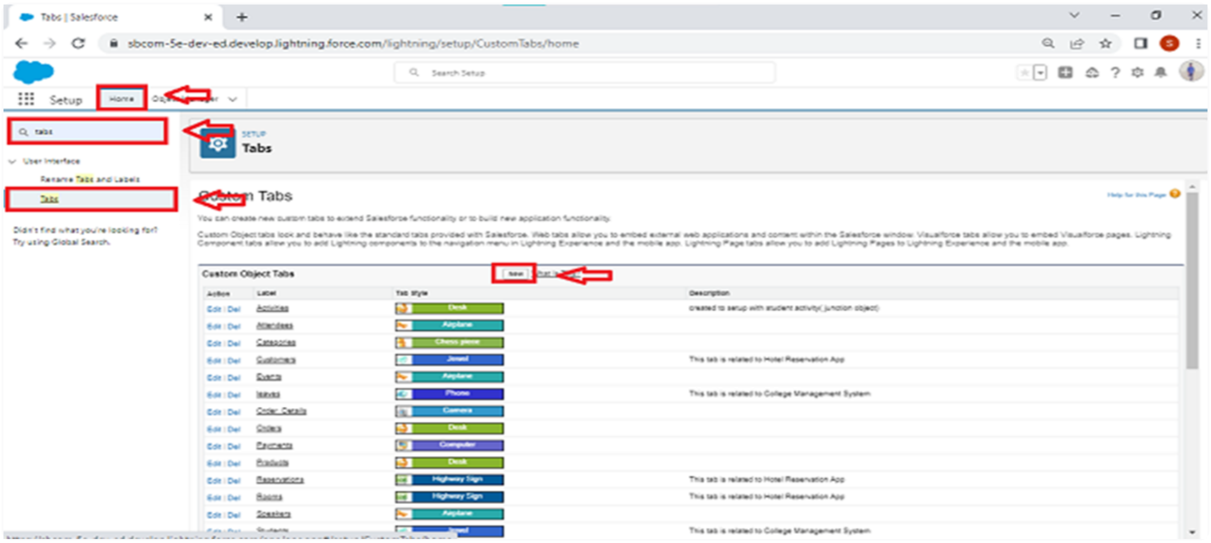
Types of Tabs:

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

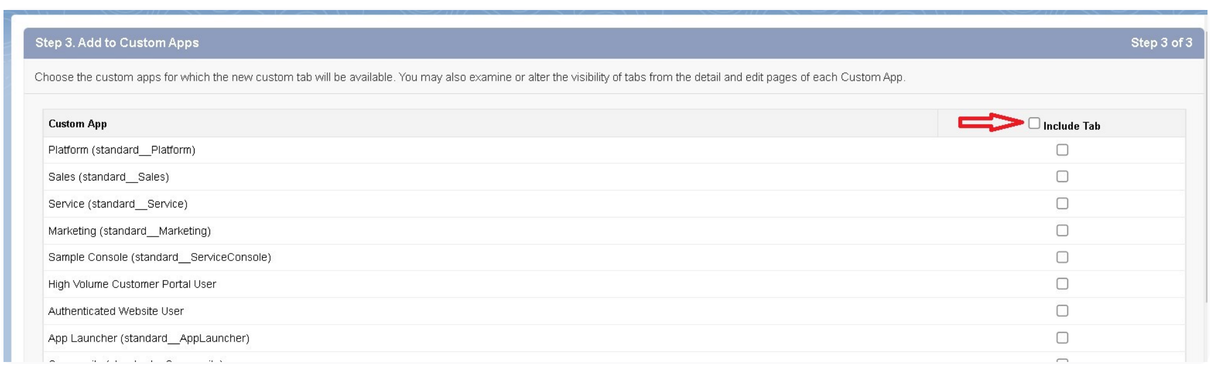
To create a Tab:(supplier)

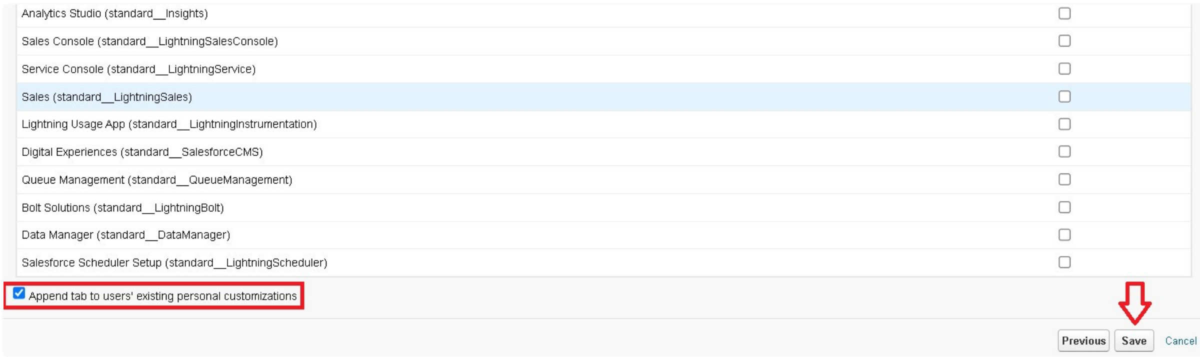
1. Go to setup page ? type Tabs in Quick Find bar ? click on tabs ? New (under custom object tab)



2. 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 .
3. Make sure that Append tab to users' existing personal customizations is checked.
4. Click save.


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
Include Tab
Platform (standard__Platform)
Sales (standard__Sales)
Service (standard__Service)
Marketing (standard__Marketing)
Sample Console (standard__ServiceConsole)
High Volume Customer Portal User
Authenticated Website User
App Launcher (standard__AppLauncher)



3.2 Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are " Gas station, Buyer, Fuel details".
2. Follow the same steps as mentioned in Activity -1 .

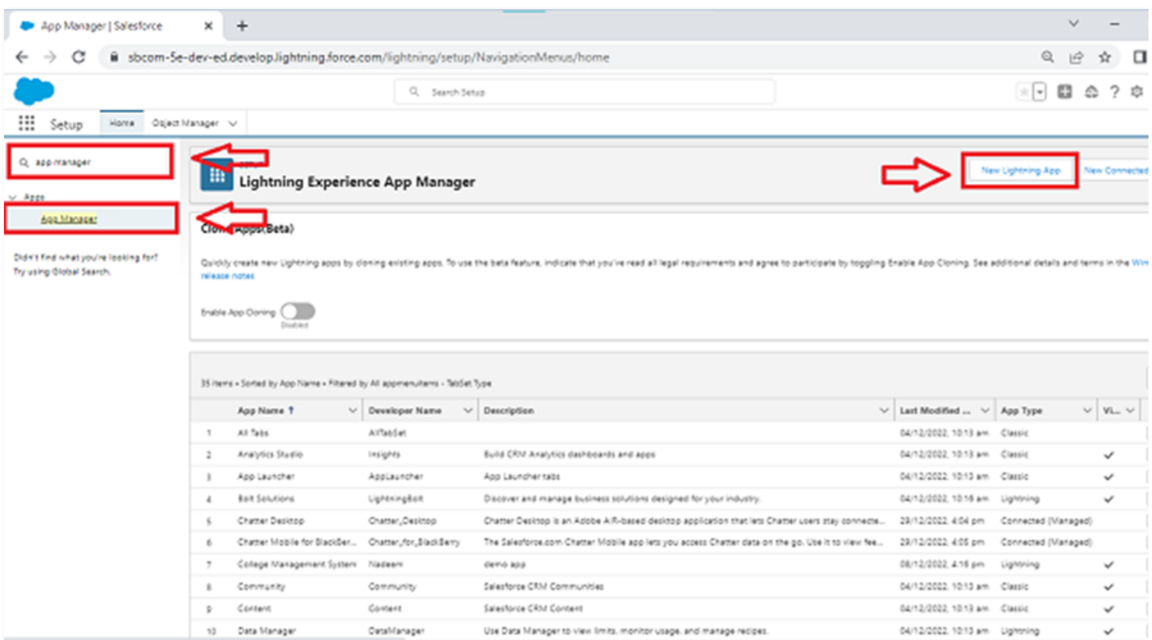
4.The Lightning App

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.

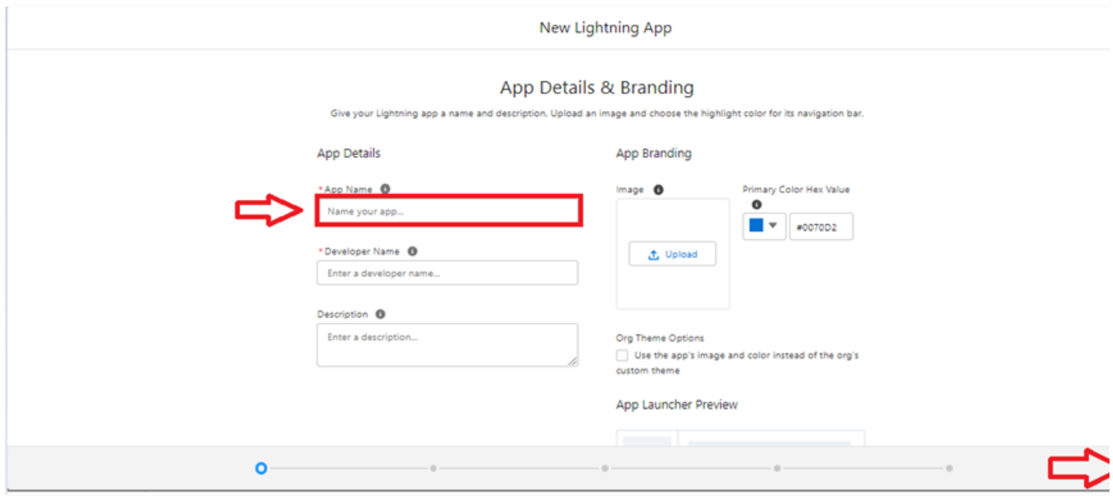
4.1 Create a Lightning App

To create a lightning app page:

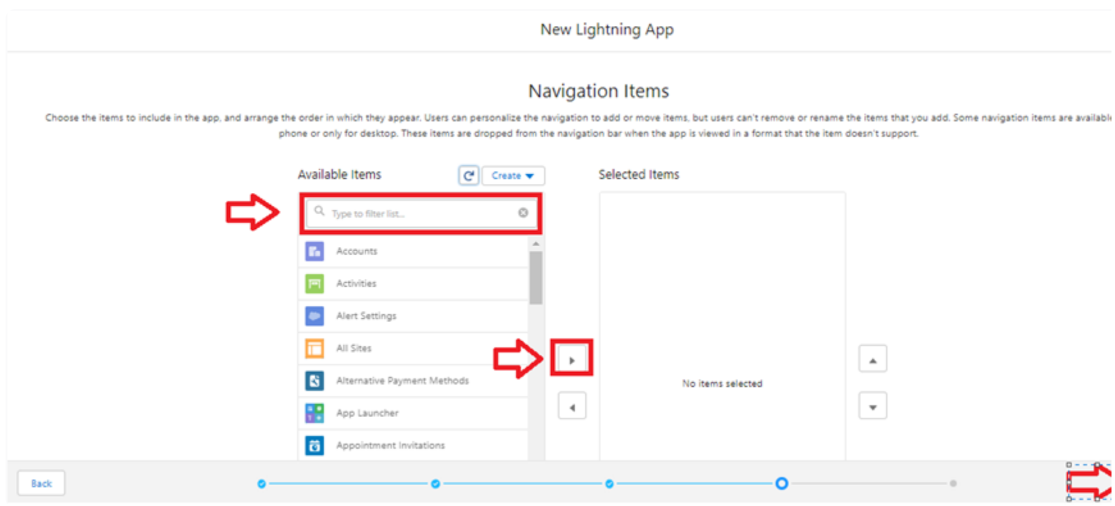
1. Go to setup page ? search “app manager” in quick find ? select “app manager” ? click on New lightning App.



2. 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.

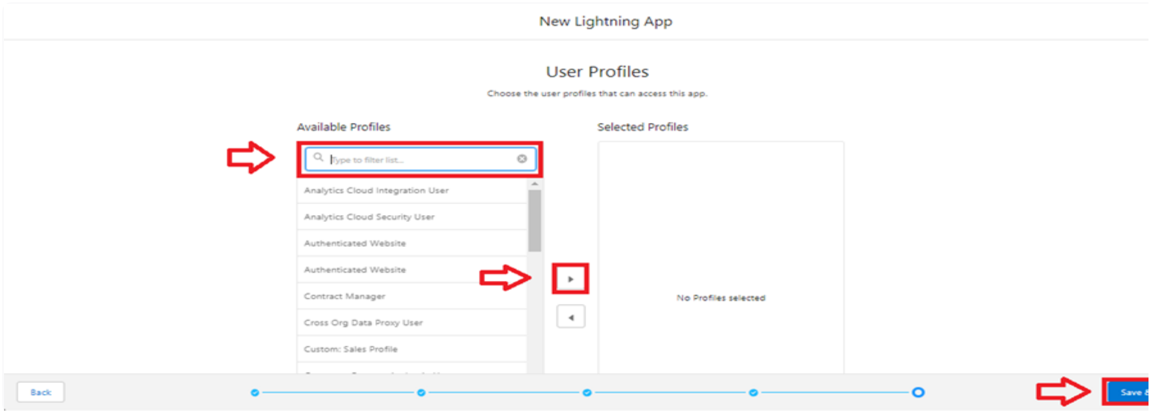


3. To Add Navigation Items:



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

4. To Add User Profiles:



Search profiles (System administrator) in the search bar ? click on the arrow button ? 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

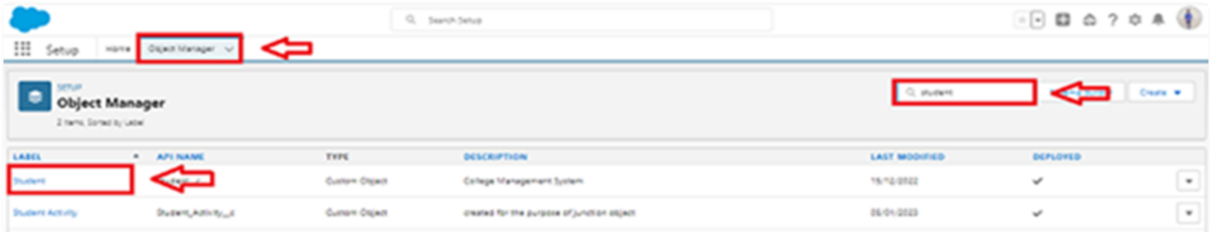
Custom Fields:
On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision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

5.1 Creating Junction Object

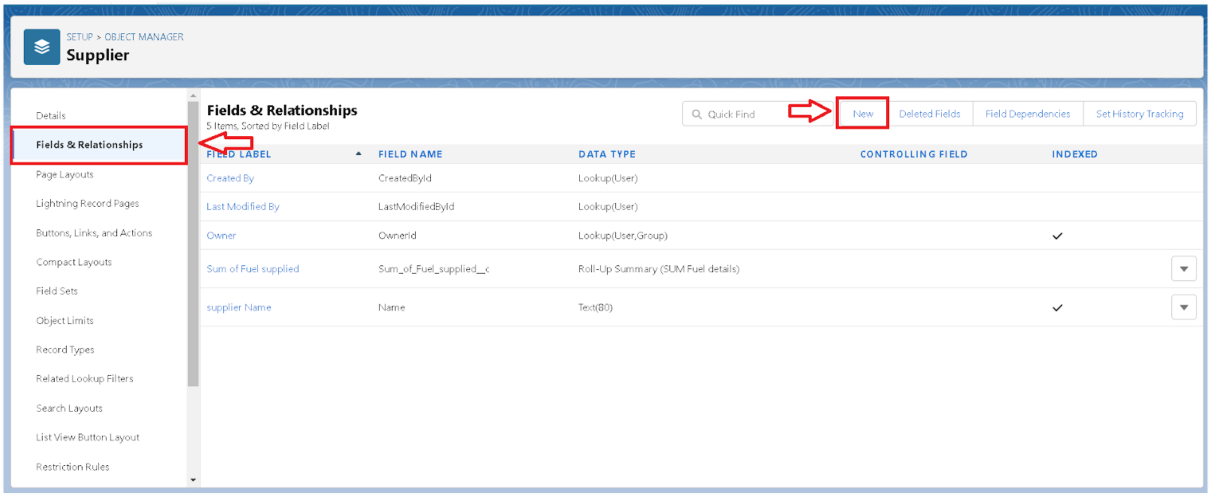
Junction object is a custom object that serves as a bridge between two related objects in a many-to-many relationship. It allows you to create a relationship between records of two different objects by creating a many-to-many relationship model.

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

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

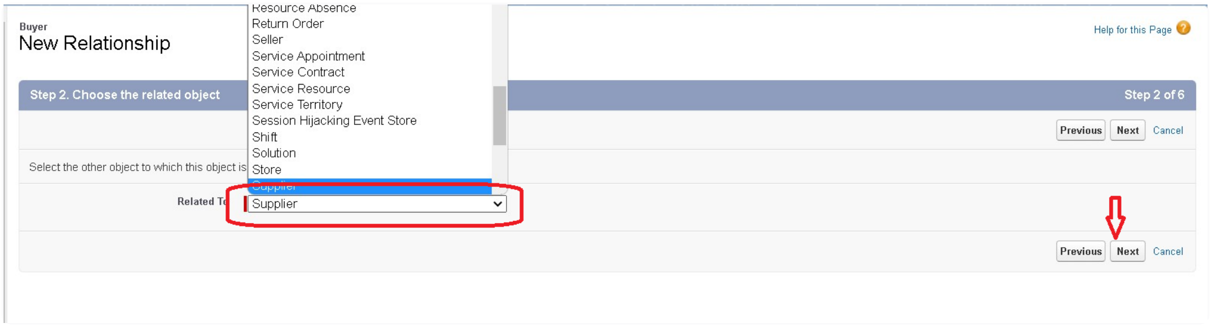


2. Click on fields & relationship ? click on New.



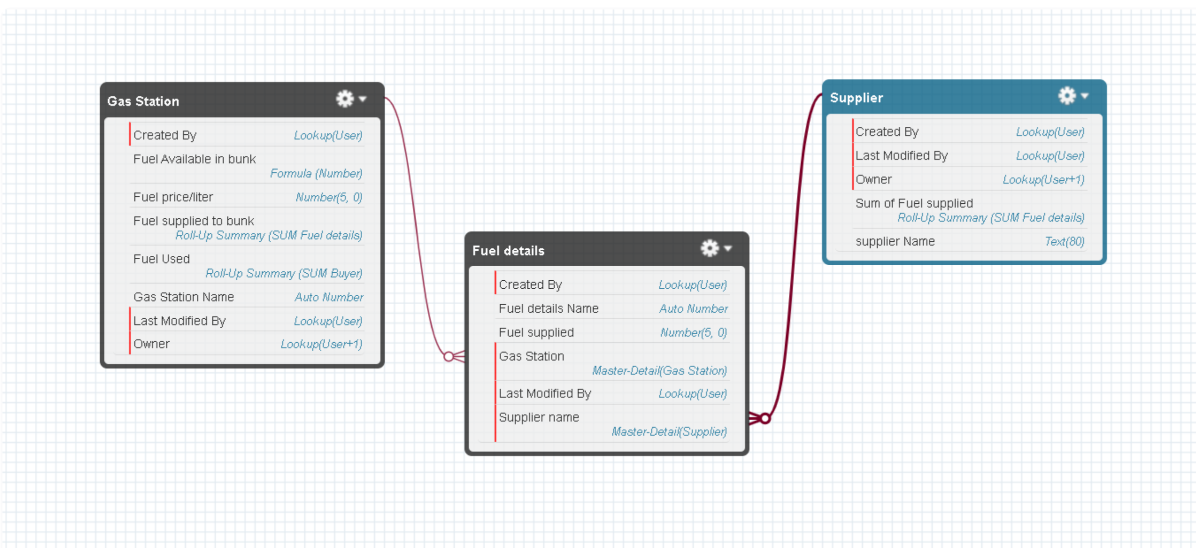
3. Select “Master-Detail relationship” as data type and click Next.

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



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

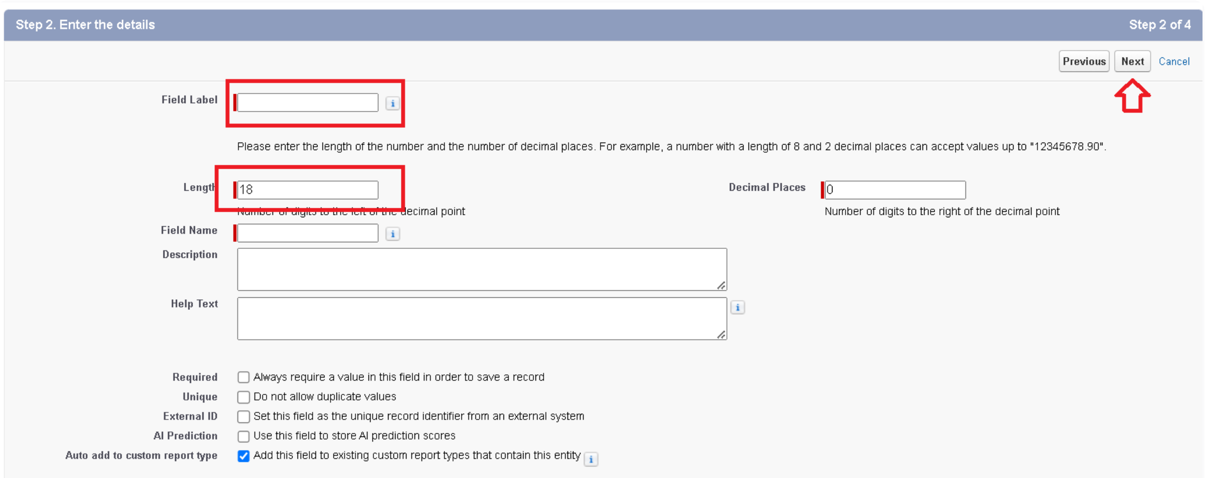
1. Go to the setup page ? click on object manager ? From drop down click edit for Buyer object.

2. Click on fields & relationship ? 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 ? Next ? 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 ”.



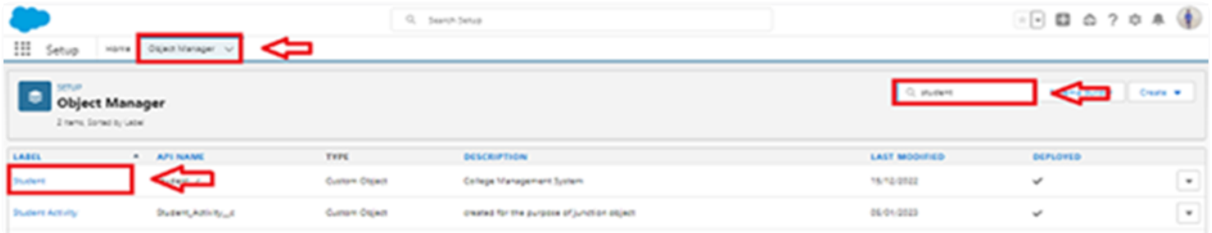
4. Field Name will be auto populated, and click on Next? Next ? Save.

5.4 Creating the Roll-up Summary

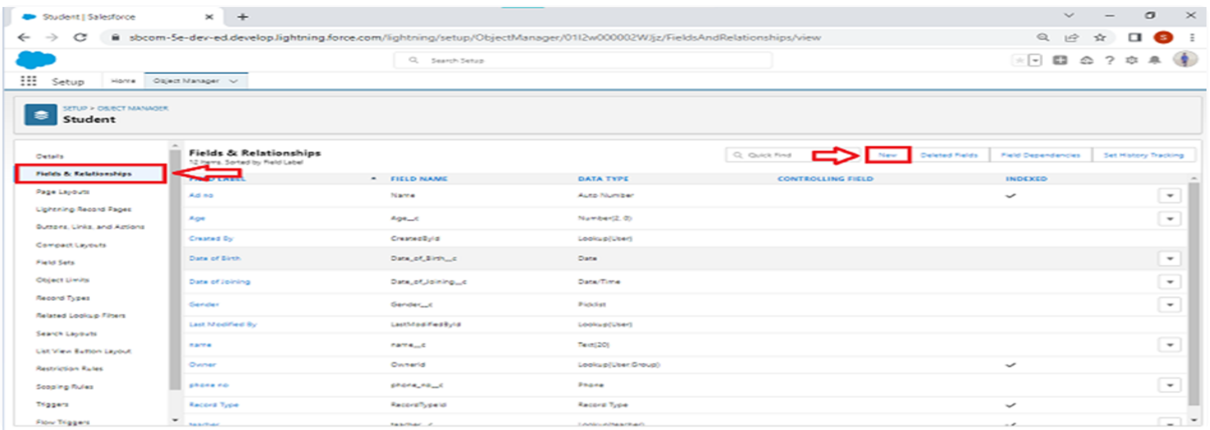
A rollup summary field is a field that summarizes data from a child object to a parent object that share a master-detail relationship. Rollup summary fields can use the COUNT, SUM, MIN, and MAX functions. For example, you could use a rollup summary field to display the total value (amount of fuel supplied)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

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

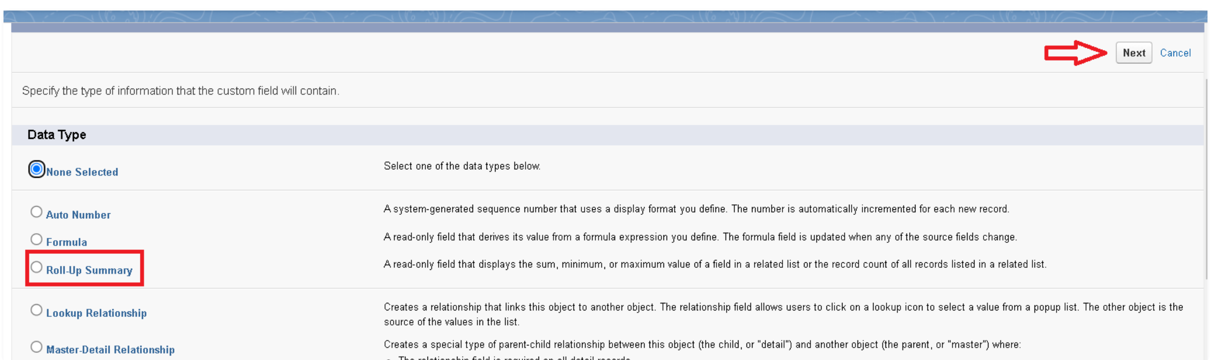
1. Go to setup ? click on Object Manager ? type object name(Supplier) in search bar ? click on the object.



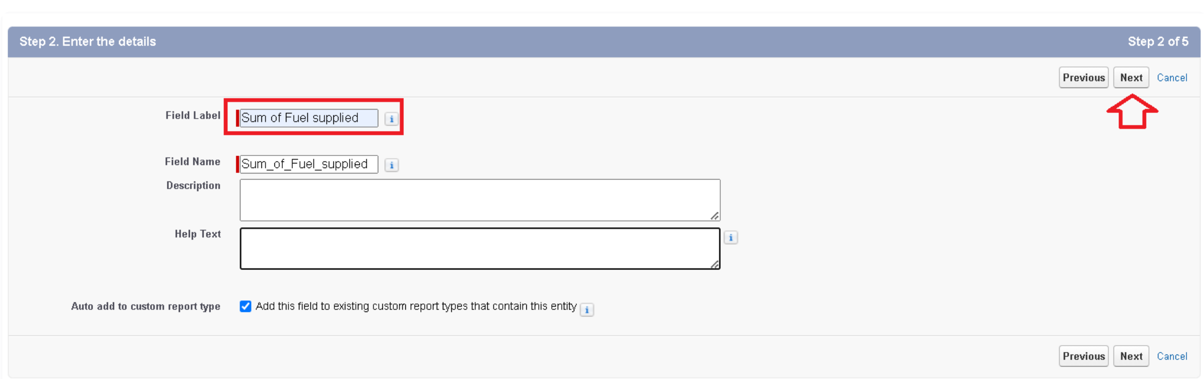
2. Now click on “Fields & Relationships” ? New



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



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



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 ? Next ? Save.

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 ? Next ? Save.

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

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 ? Next ? Save.

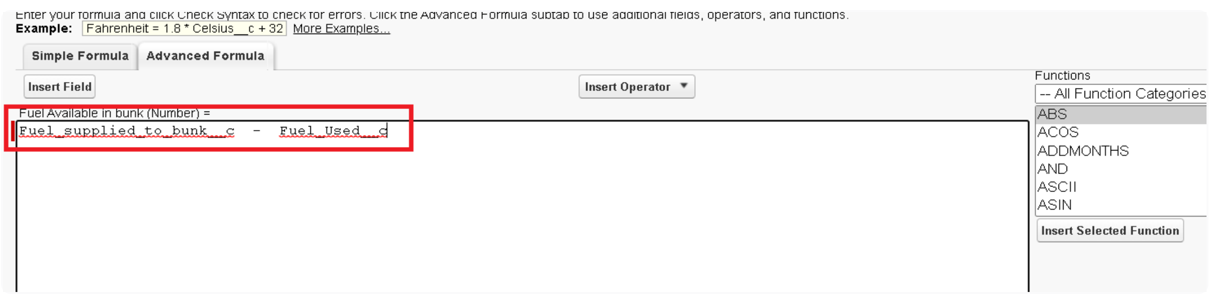
5.5 Creating Formula Field in Gas Station Object

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:

- Calculating totals or averages
- Creating custom fields that display data from other fields
- Validating data entry
- Automating processes

1. Go to setup ? click on Object Manager ? type object name(Gas station) in search bar ? click on the object.
2. Click on fields & relationship ? 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.

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



7. **Creating the Formula 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

8. Go to setup ? click on Object Manager ? type object name(Buyer) in search bar ? click on the object.
9. Click on fields & relationship ? 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.

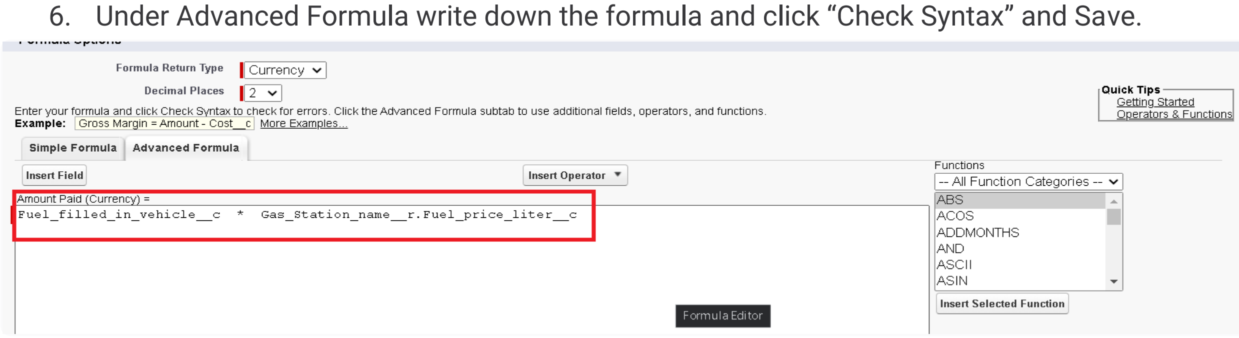
Note : check wheather that the fields that mentioned in the formula field are created are not , if not go to activity 9 and create that fields mentioned in Buyer object.

1. Go to setup ? click on Object Manager ? type object name(Buyer) in search bar ? click on the object.
2. Click on fields & relationship ? 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.

5. Insert fields formula should be :

   Fuel_filled_in_vehicle__c * Gas_Station_name__r.Fuel_price_liter__c

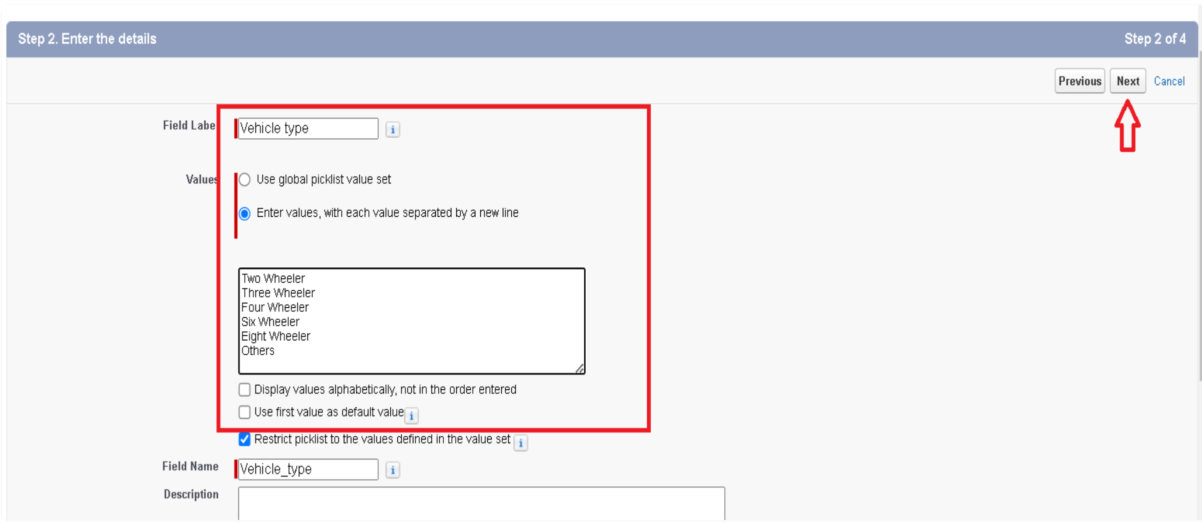
6. Under Advanced Formula write down the formula and click “Check Syntax” and Save.



5.7 Creating Picklist Field in Buyer Object

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

object.
2. Click on fields & relationship ? 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.



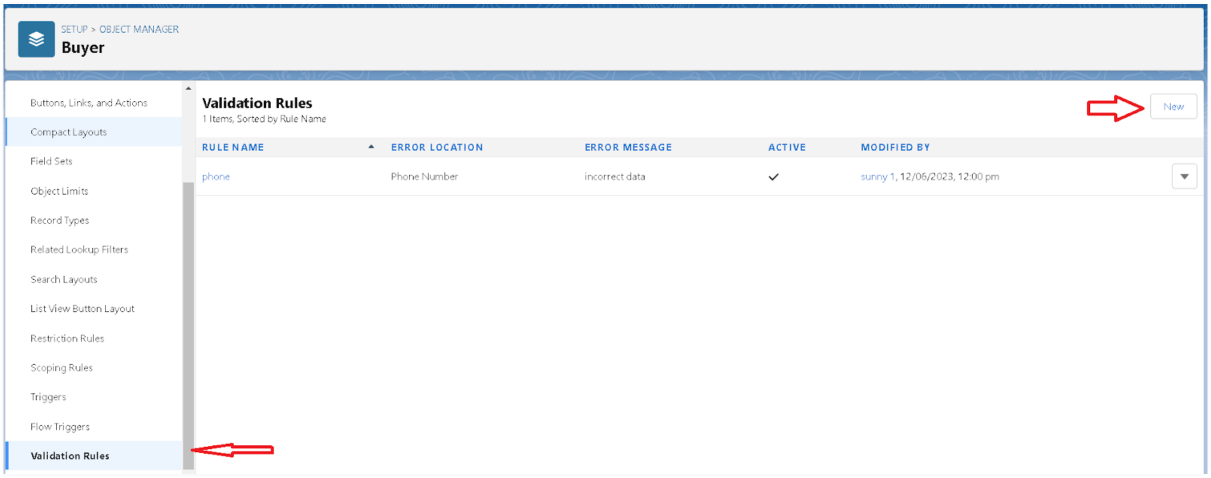
6. Click Next.
7. Next ? Next ? Save & New.
8. Repeat the process 1 and 2 steps .
9. Enter Field Label as “Mode of payment”, under values select “Enter values, with each value separated by a new line" and enter values as shown below.
10. The values are : credit card, debit card, net banking, upi, cash.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

5.8 Creating the validation rule

Creating the validation rule for phone number field in Buyer object

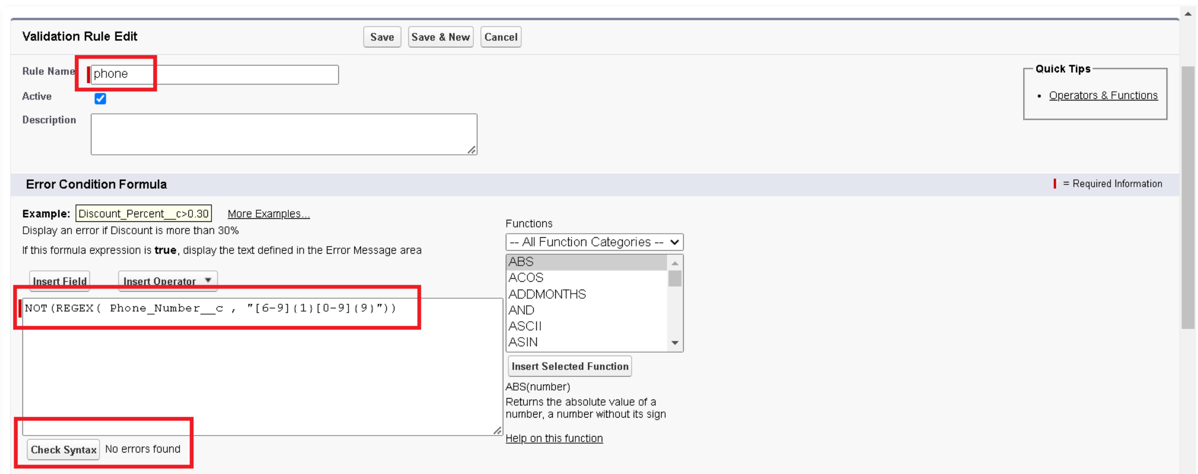
Note : check wheather that the fields that mentioned in the formula field are created are not , if not go to activity 9 and create that fields mentioned in Buyer object.

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

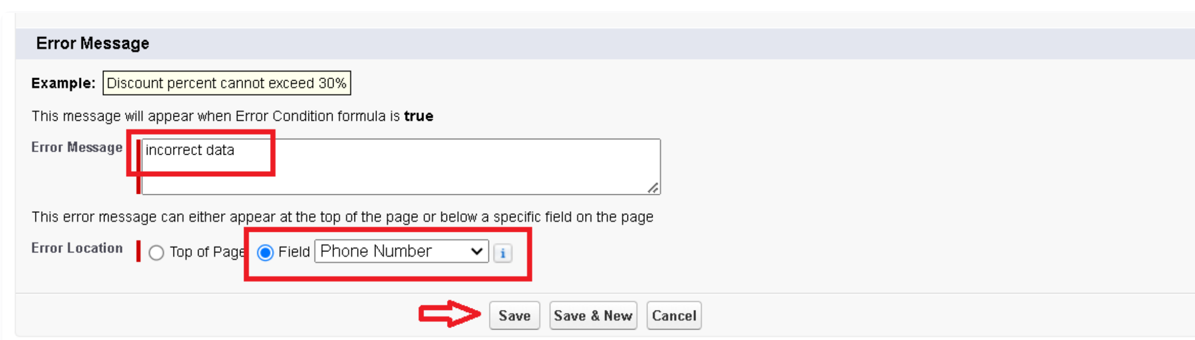


3. Enter the Rule name as “Phone ”.
4. Insert the Error Condition Formula as : -

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



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

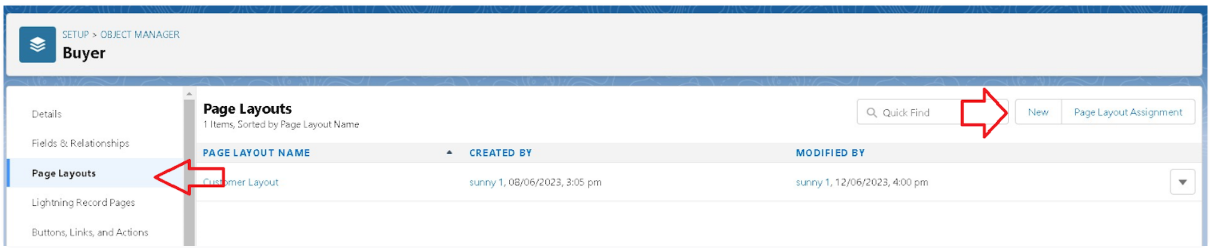


6.Page Layouts

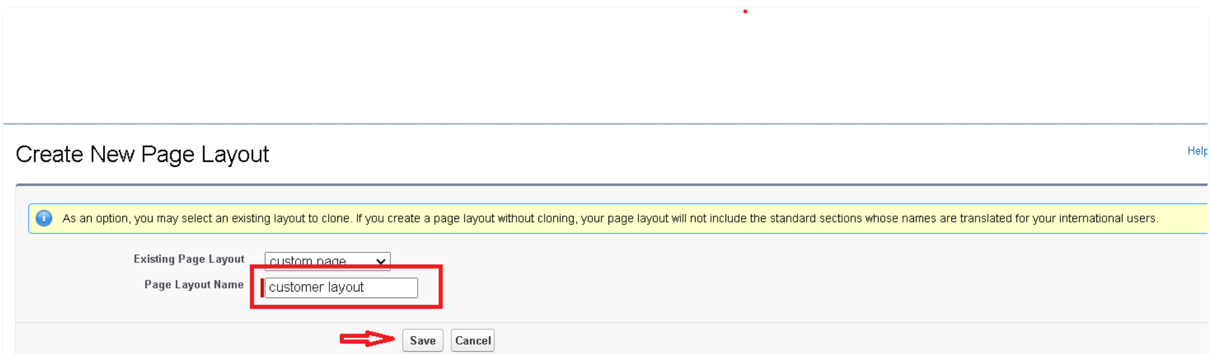
6.1 Creating the page layout

To Create a Page layout:

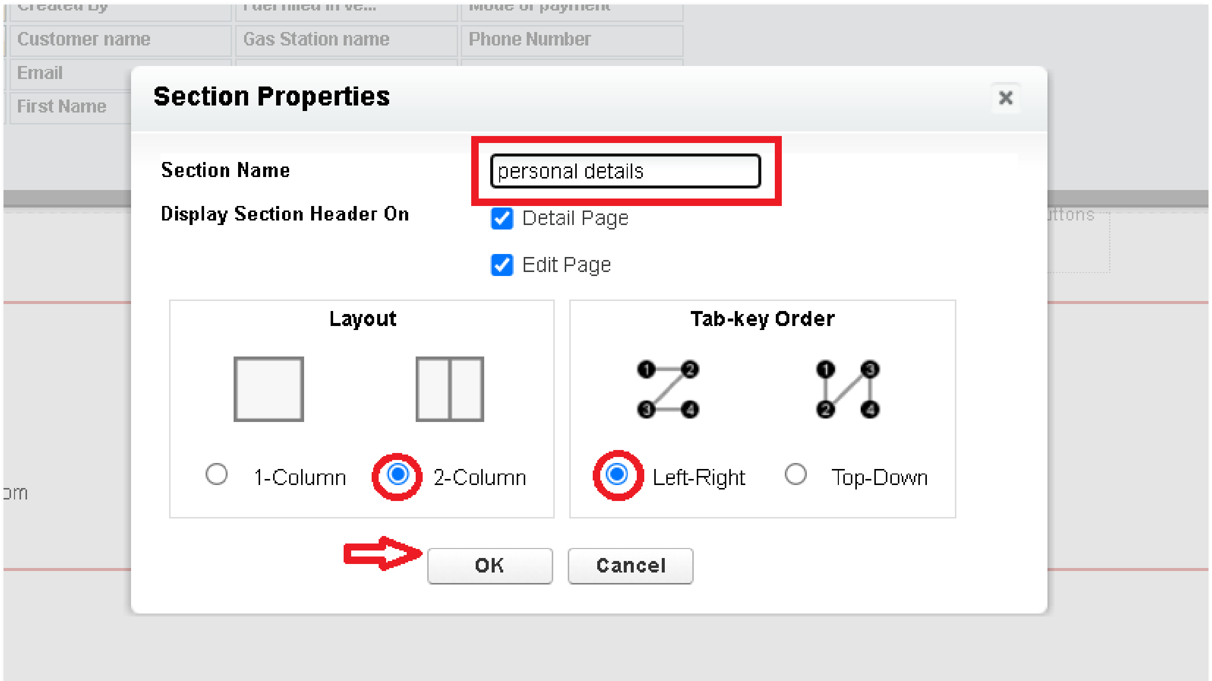
1. Go to Setup ? Click on Object Manager ? Search for the object (Buyer) ? From drop down select the object and click on it.
2. Click on Page layout ? Click on New.



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

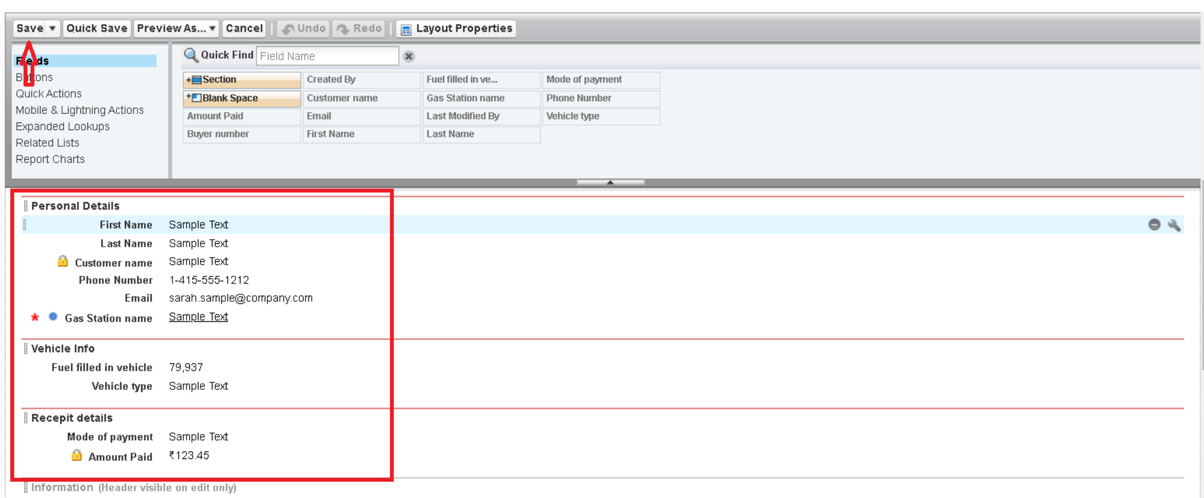


4. Drag and drop the section field to Buyer details and create the section.
5. Enter the section name as “Persoanl details”, ? click Ok.



6. Now drag the fields to this section that mentioned , they are
- First name , last name , customer name , phone number, email, Gas station name.

7. Follow the same process for another two sections as shown above , they are
8. 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.
10. Then , Click save.



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.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- 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:**

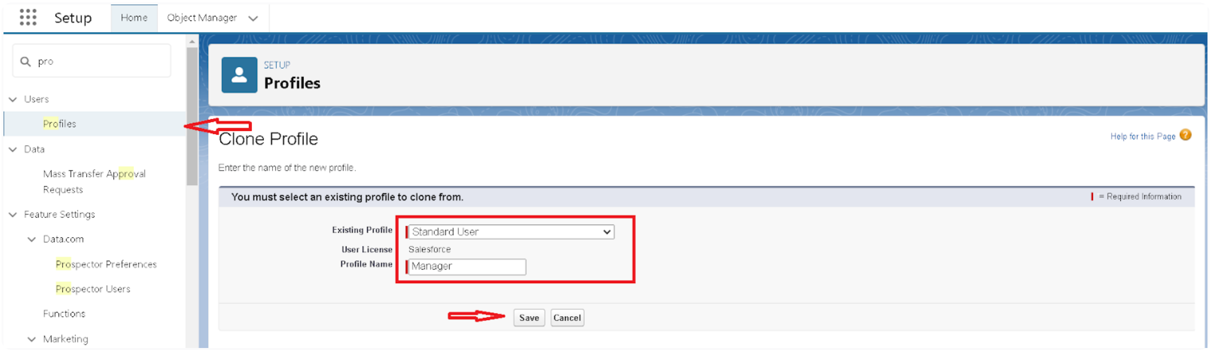
   Custom ones defined by us.

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

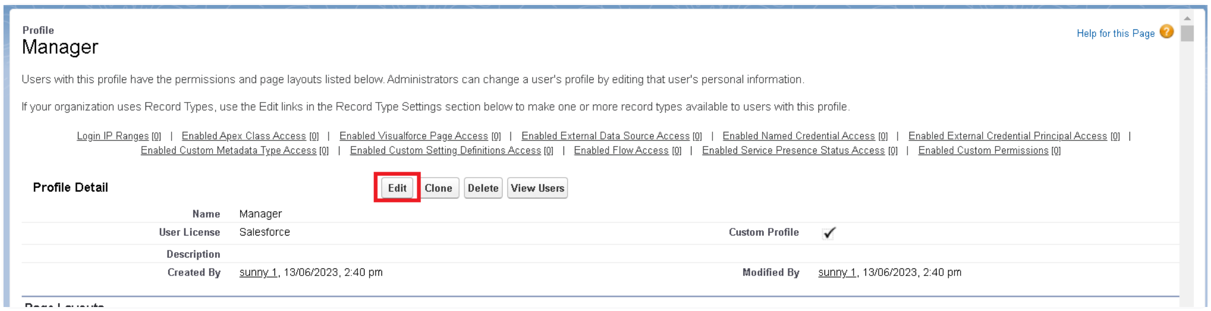
7.1 Manager Profile

To create a new profile:

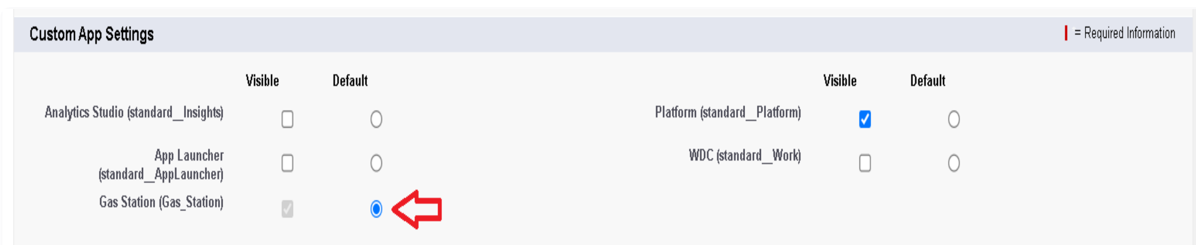
1. Go to setup ? type profiles in quick find box ? click on profiles ? clone the desired profile (Standard User) ? enter profile name (Manager) ? Save.



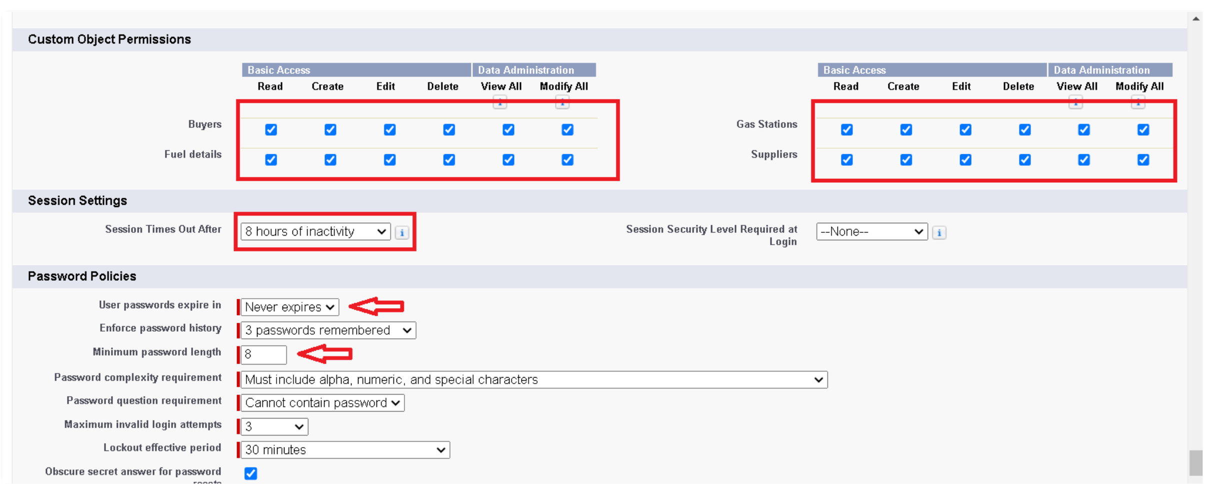
2. While still on the profile page, then click Edit.



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.

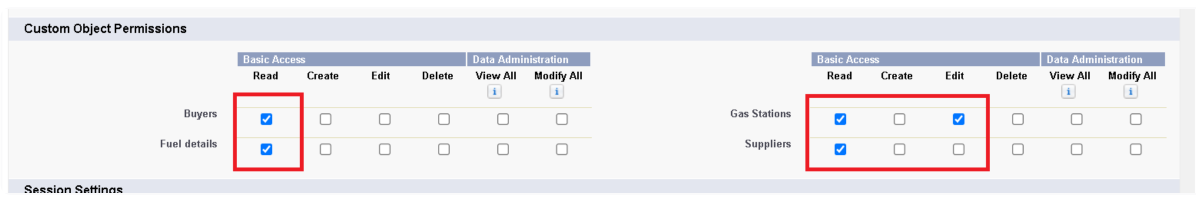


5. Change the session times out after should be “ 8 hours of inactivity”.
6. Change the password policies as mentioned :

7. User passwords expire in should be “ never expires ”.
8. Minimum password length should be “ 8 ”, and click save.

7.2 Sales Executive Profile

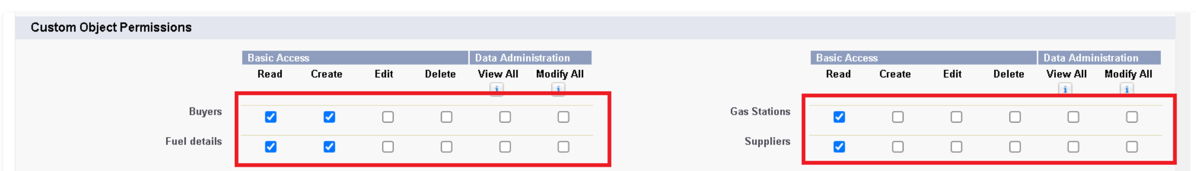
1. Go to setup ? type profiles in quick find box ? click on profiles ? clone the desired profile (Salesforce Platform User) ? enter profile name (sales executive) ? Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the Gas station.
4. Scroll down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



5. And click save.

7.3 Sales Person Profile

1. 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.
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.



5. And click save.

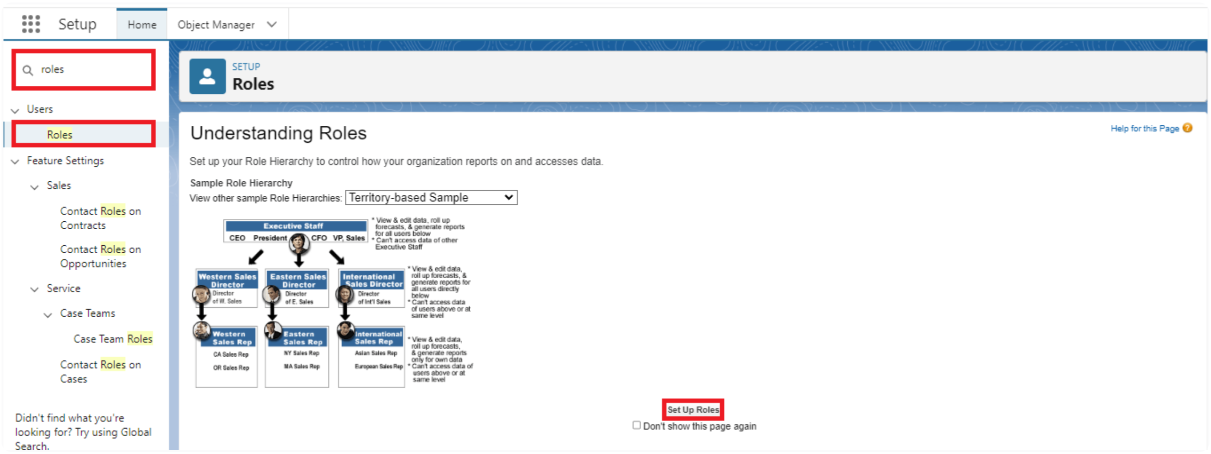
8.Role & Role Hierarchy

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

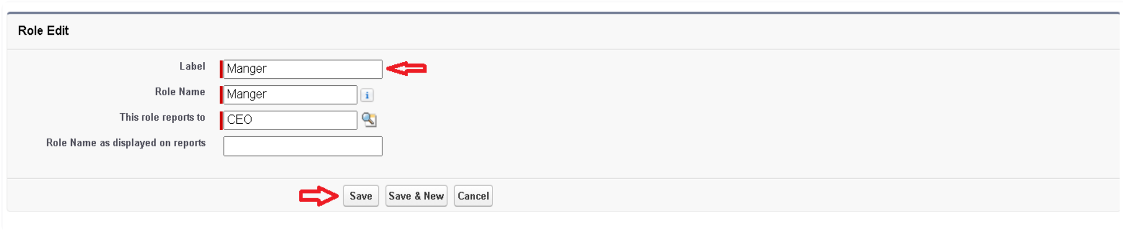
Creating Manager Role:

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



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

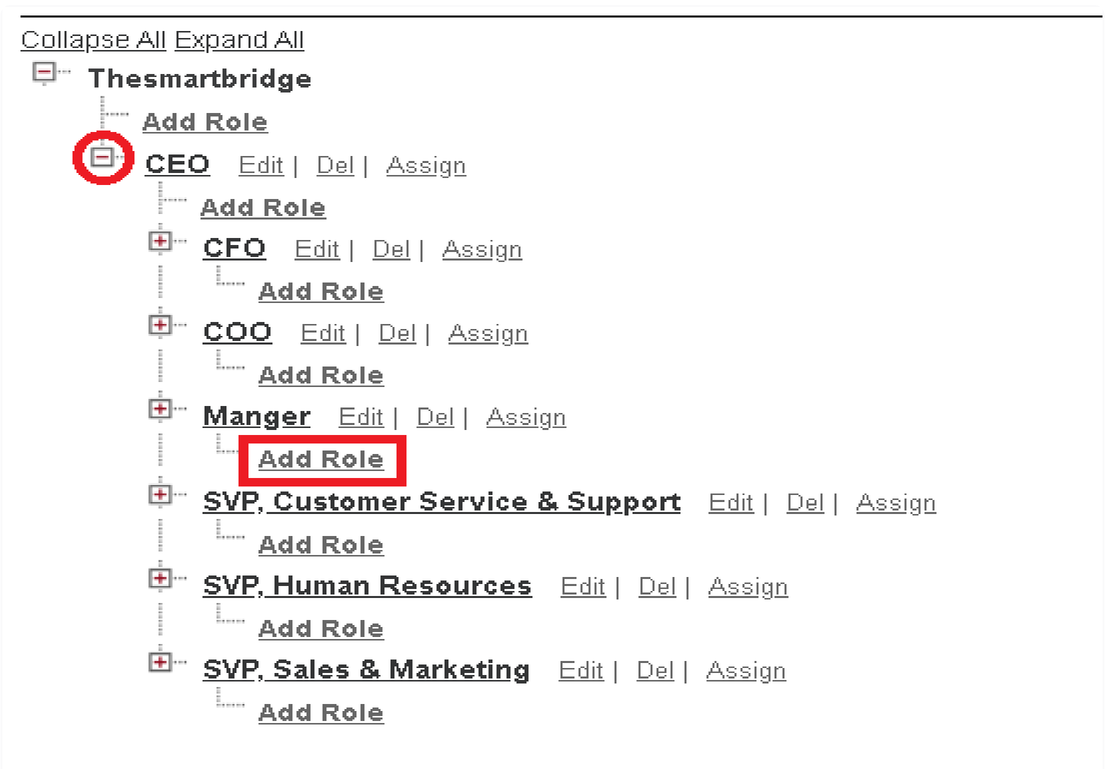
3. Give Label as “Manager” and Role name gets auto populated. Then click on Save.



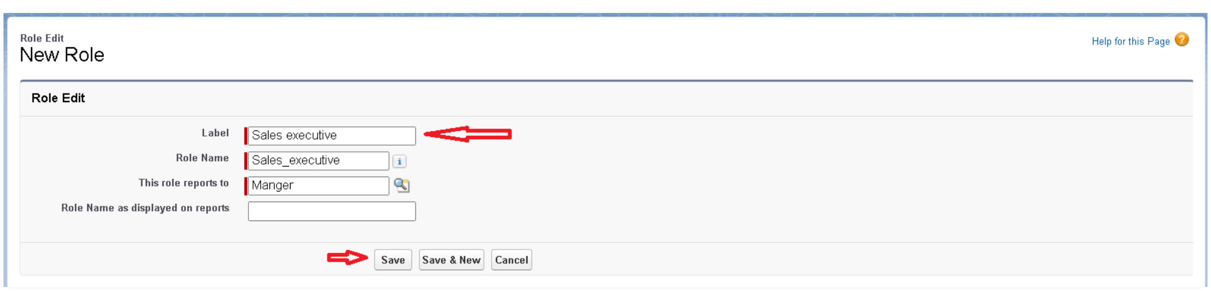
8.2 Creating another roles

Creating another two roles under manager

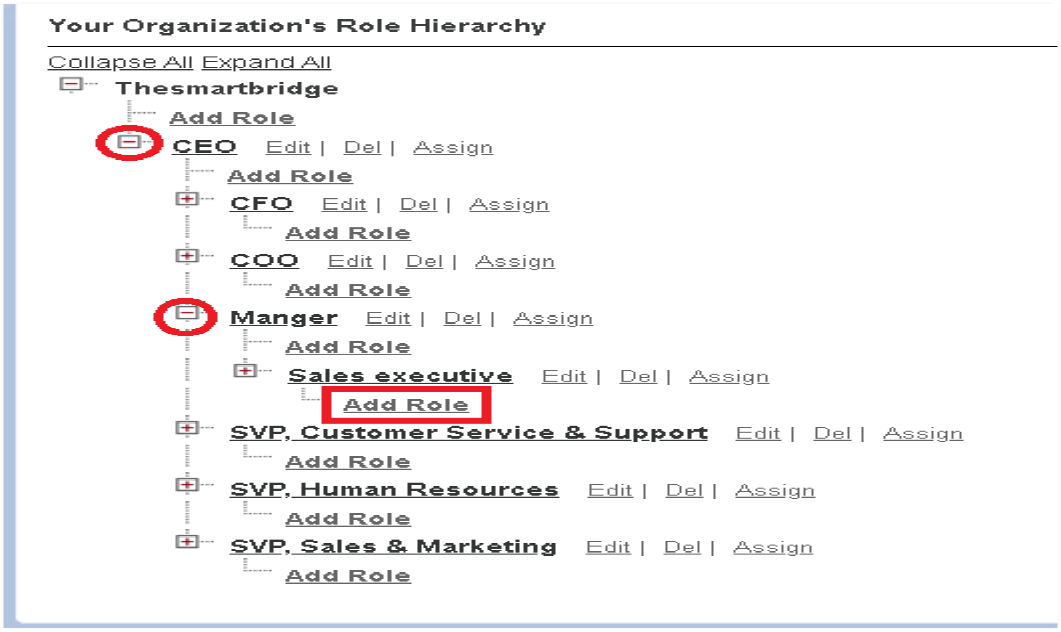
1. Go to quick find ? Search for Roles ? click on set up roles.
2. Click plus on CEO role, and click add role under manager.



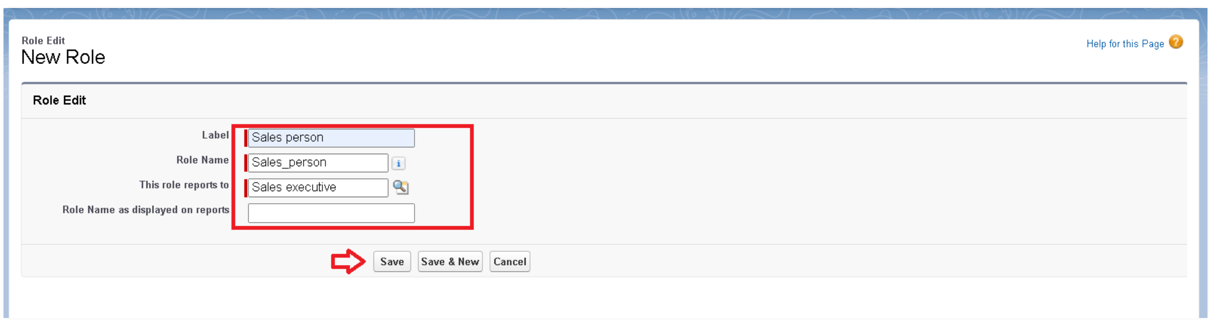
3. Give Label as “sales executive” and Role name gets auto populated. Then click on Save.



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.

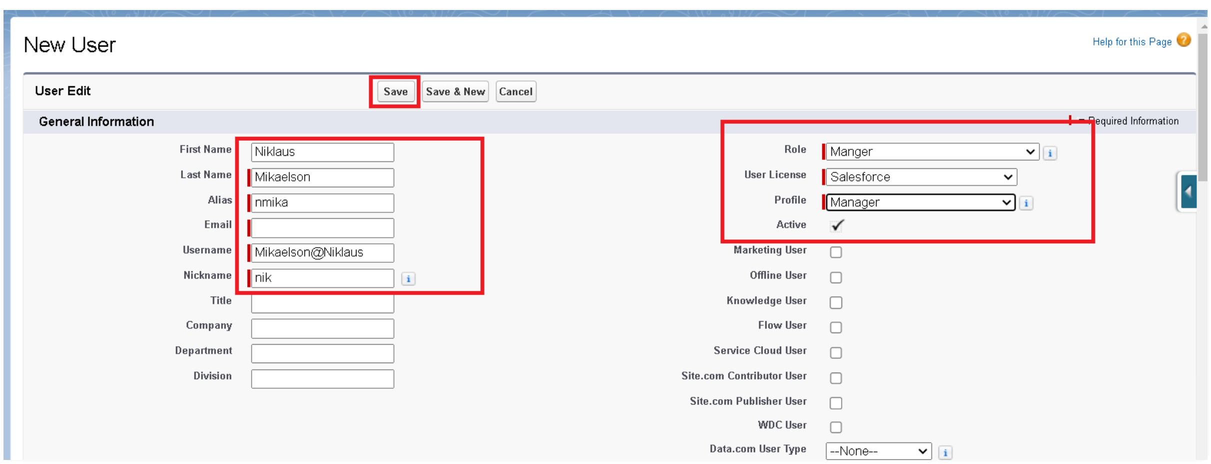


9.Users

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 ? type users in quick find box ? select users ? 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
9. Profiles : Manager



3. Save.

9.2 Creating Another Users

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

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

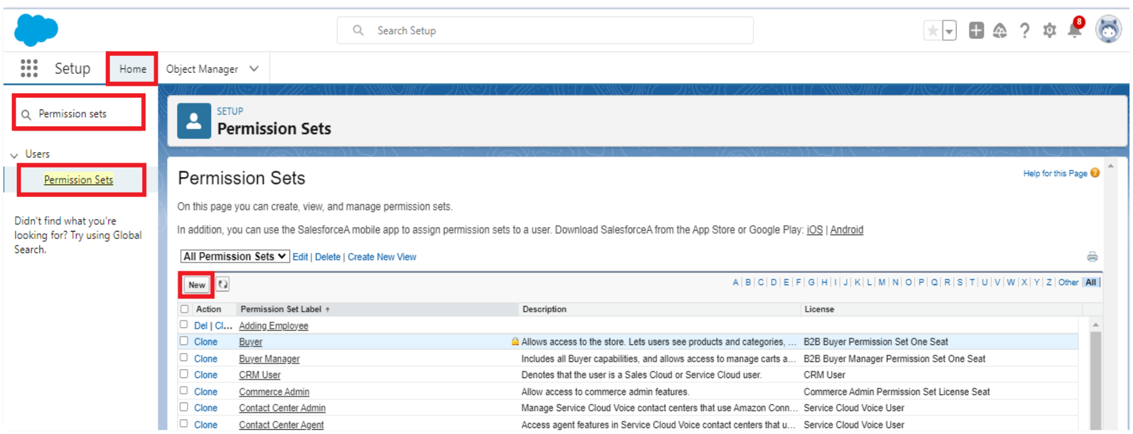
10.Permission sets

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.

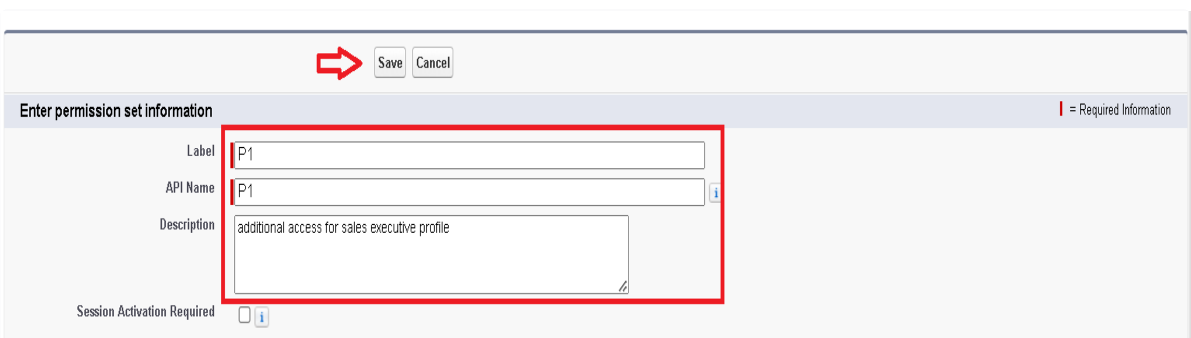
10.1 Creating permission set

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.

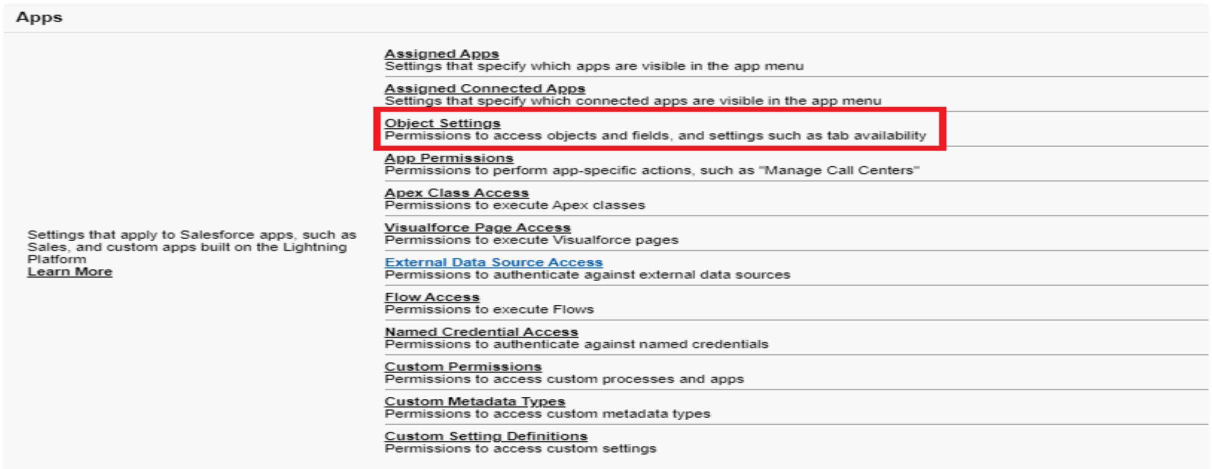
1. Go to setup ? type "permission sets" in quick search ? select permission sets ? New.



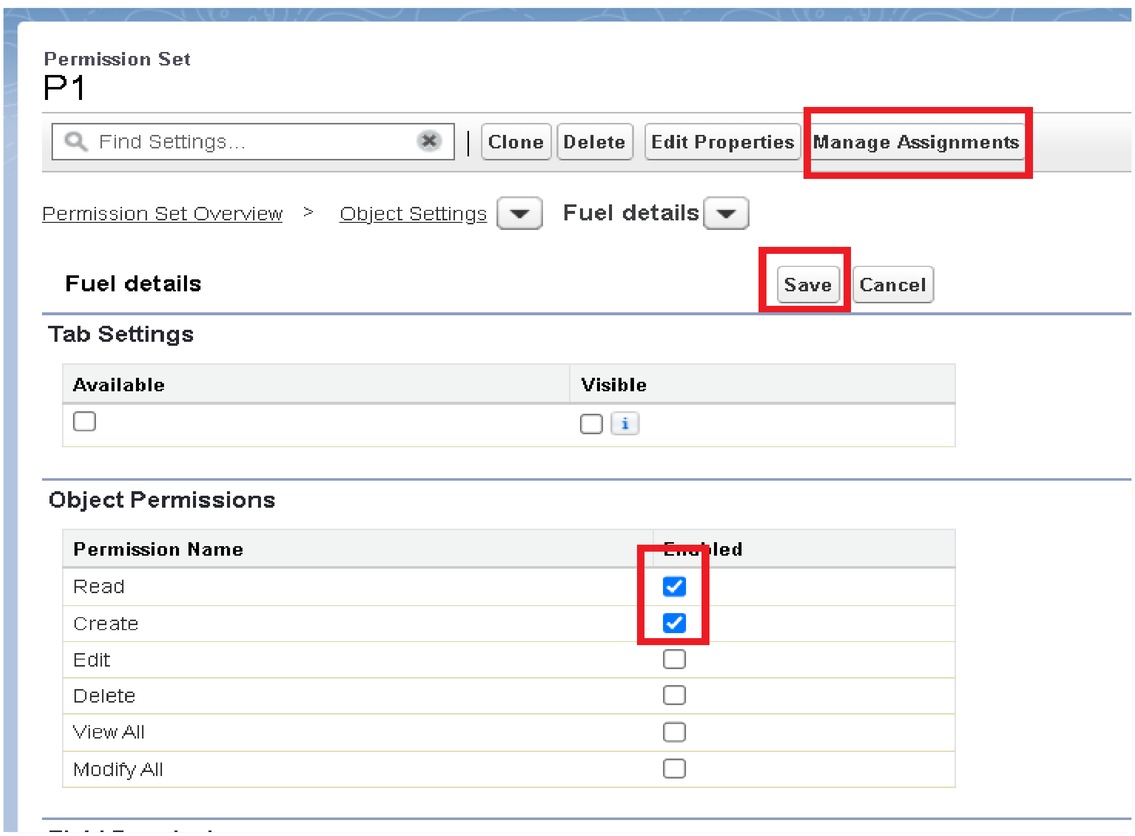
2. Enter the label name as "P1", API will be auto populated ? save.



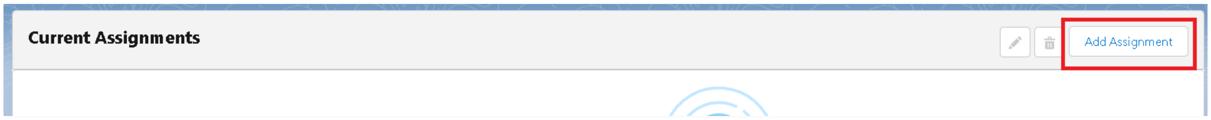
3. Under Apps Select object settings.

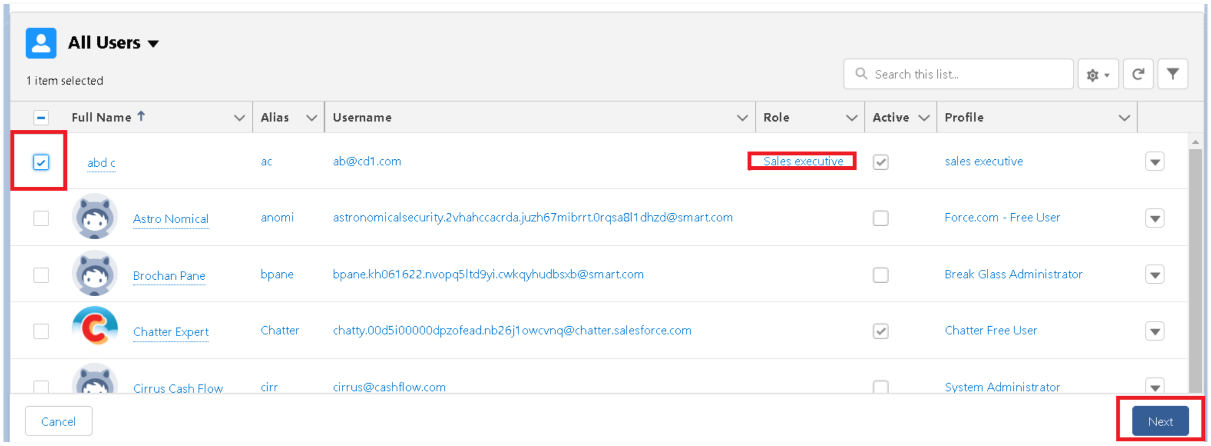


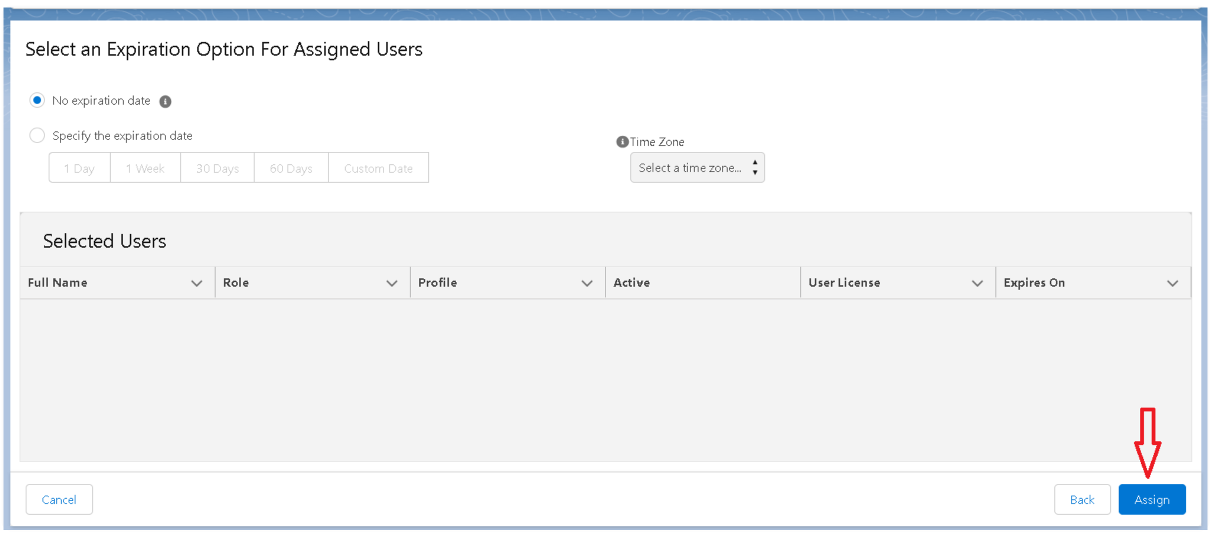
4. Click on Fuel details object ? click on Edit ? under object permission check for read and create.



5. Click on Save.
6. After saving the permission click on the Manage assignment
7. Now click on the Add Assignment.







8. Now select the users which you have created in user milestone, using sales executive profile 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)

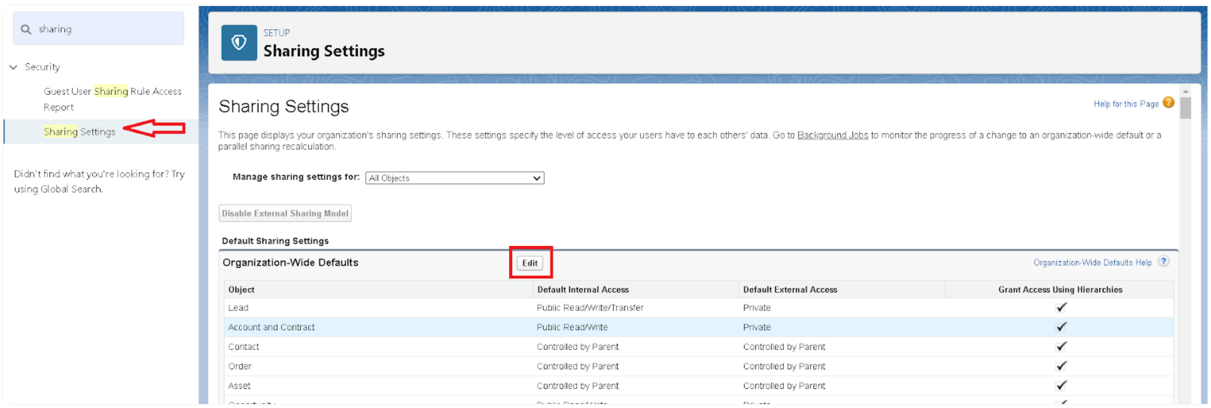
? Public Read/Write

? Public Read/Only

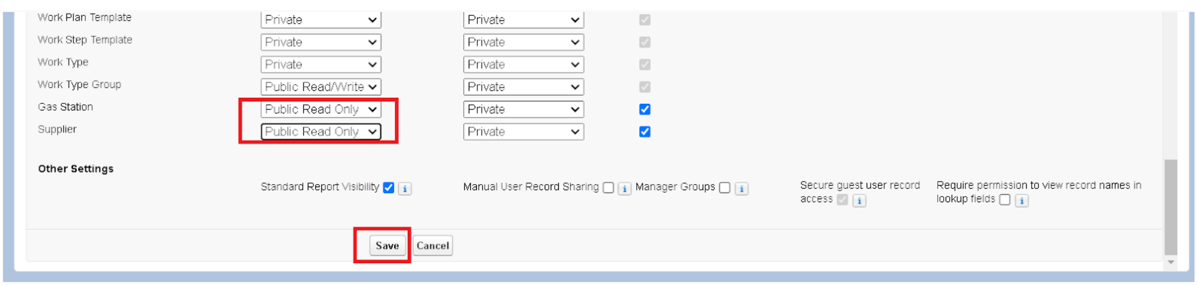
? Private

11.1 Create OWD Setting

1. Go to setup ? type “sharing settings ” in quick search ? Click edit.



2. Scroll down, change the default internal access to “ public read-only” for Gas station and Supplier object.



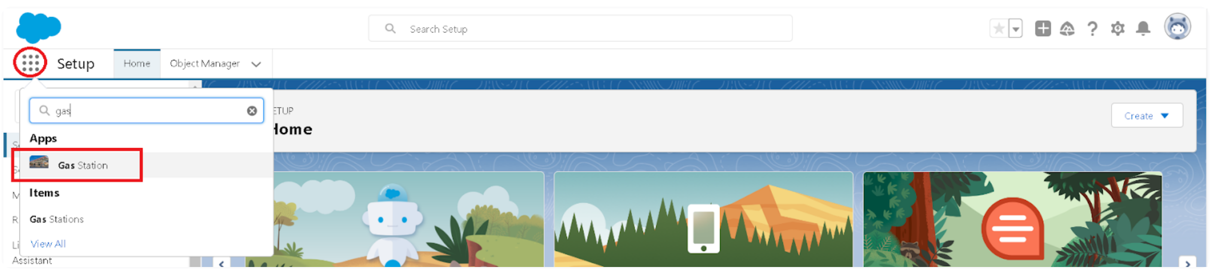
3. Click save.
4. Extra information, By these every profile has their own access, according to their profile.
5. But in our case we created a roles and given the roles in such a way that manager can see sales executive and sales person records , sales executive can see the sales person records.

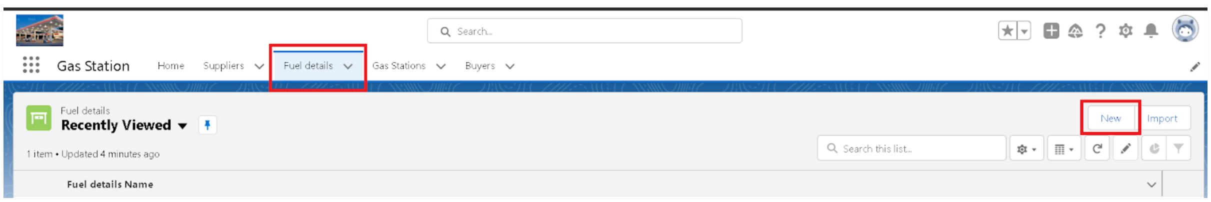
12.User Adoption

create a record

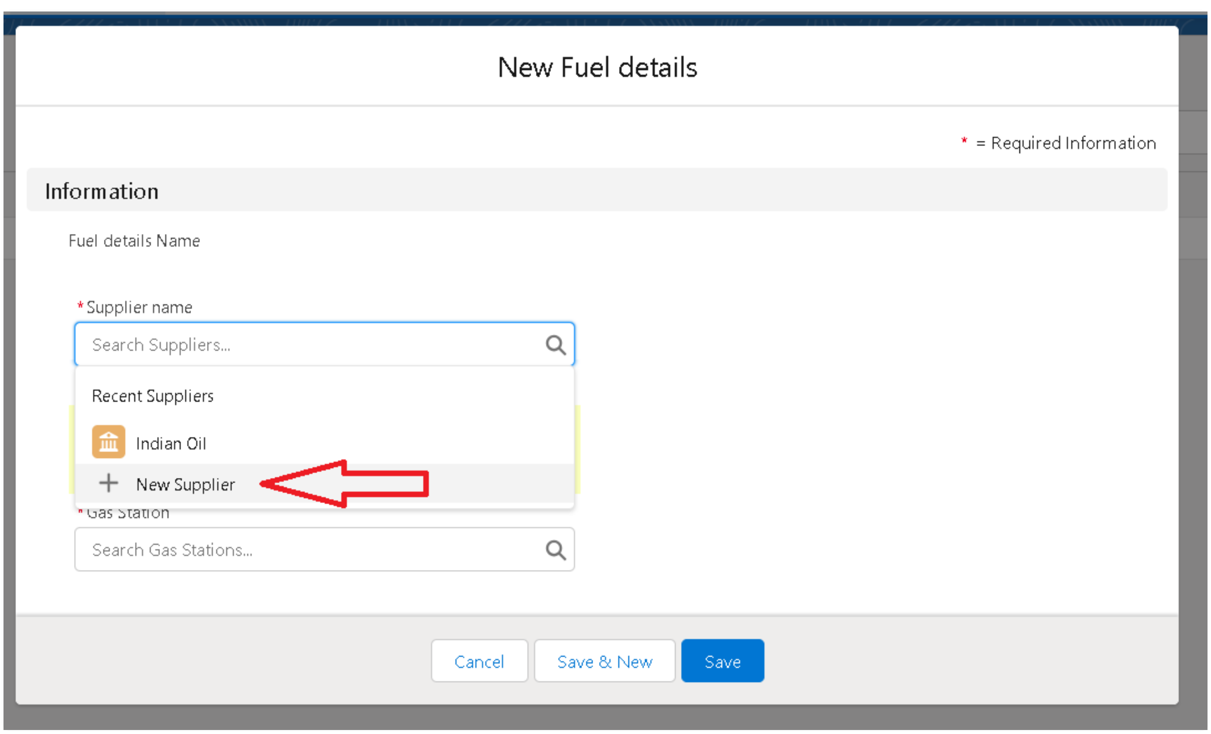
To create a record in junction object follow these steps

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.

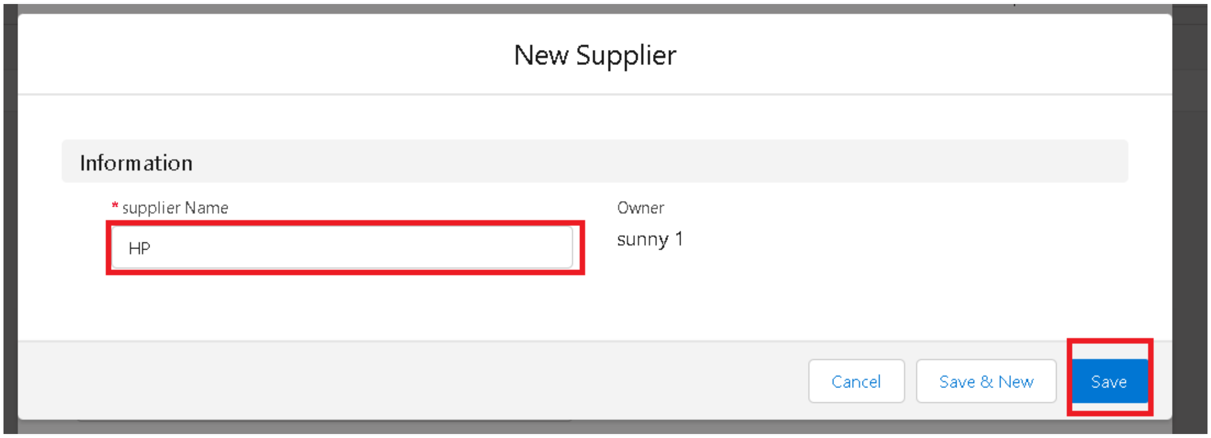




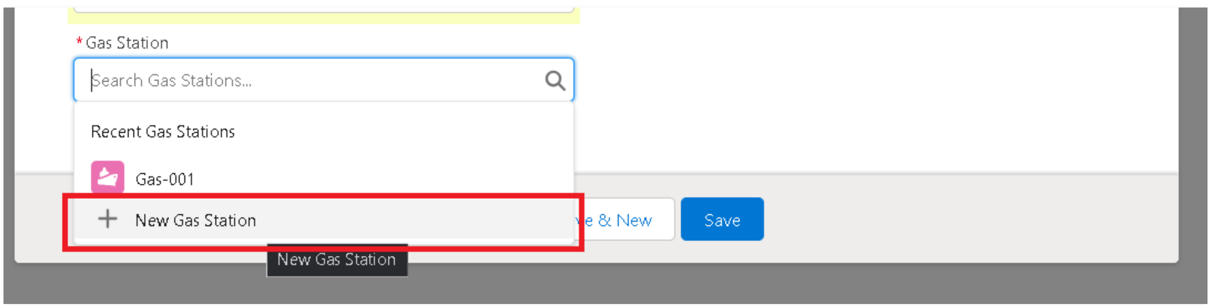
5. Creating the supplier record in fuel detail record, by clicking the “ new supplier ”.



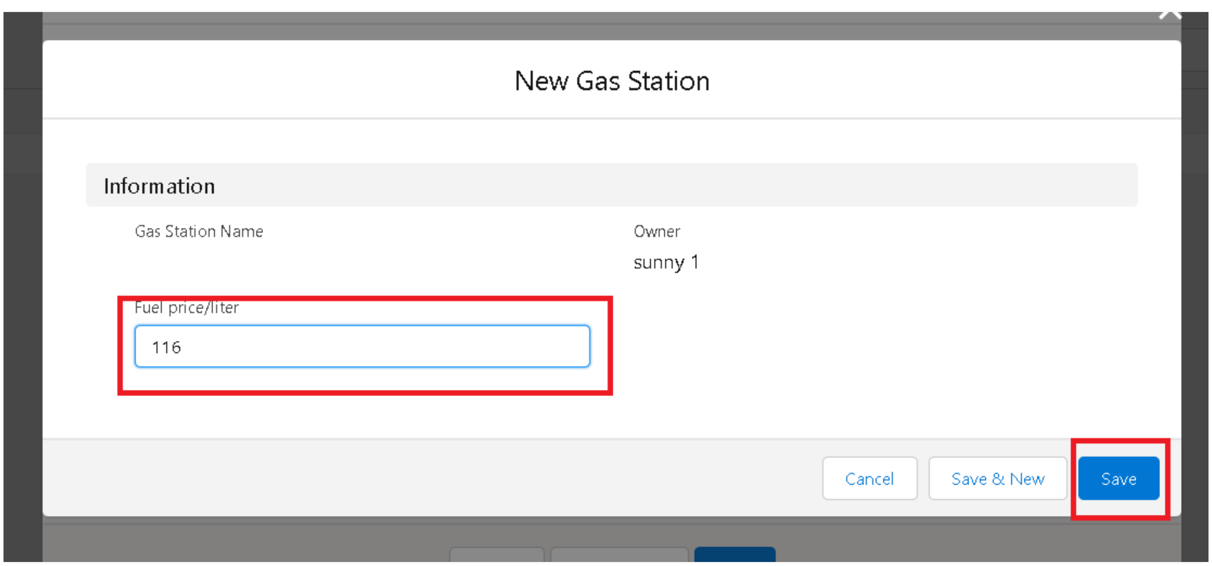
6. Fill the details in supplier record and click on save.



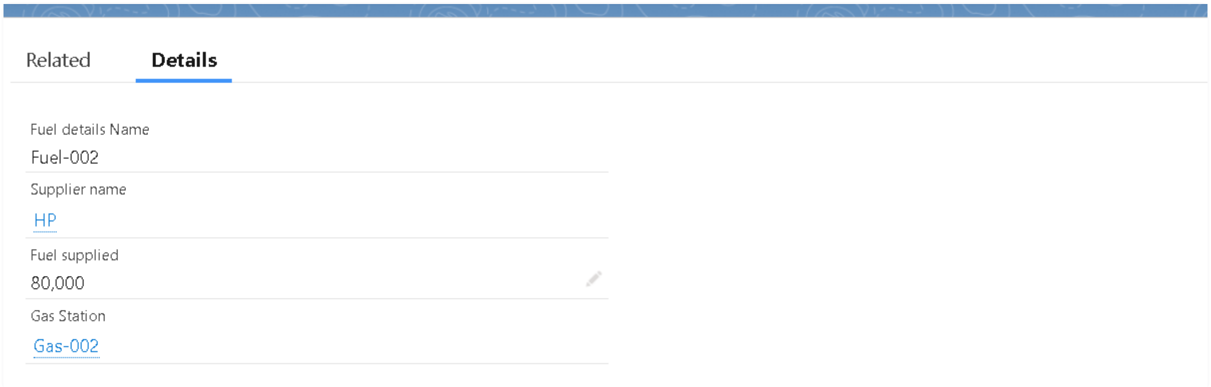
7. Creating the Gas station record in fuel details record, by clicking on new gas station.



8. Fill the details in gas station record, Click save.



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

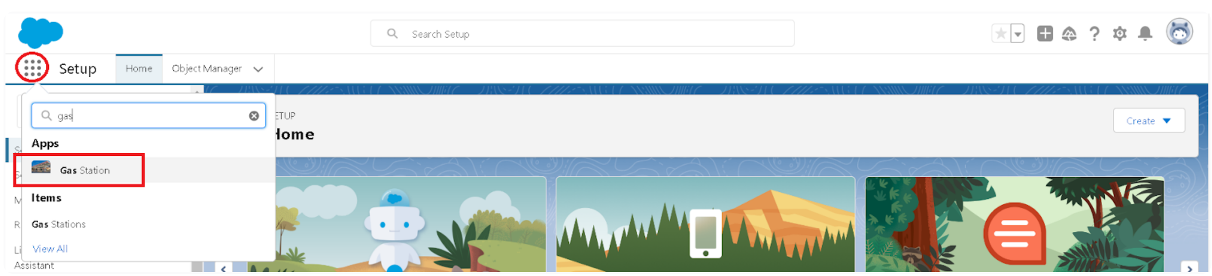


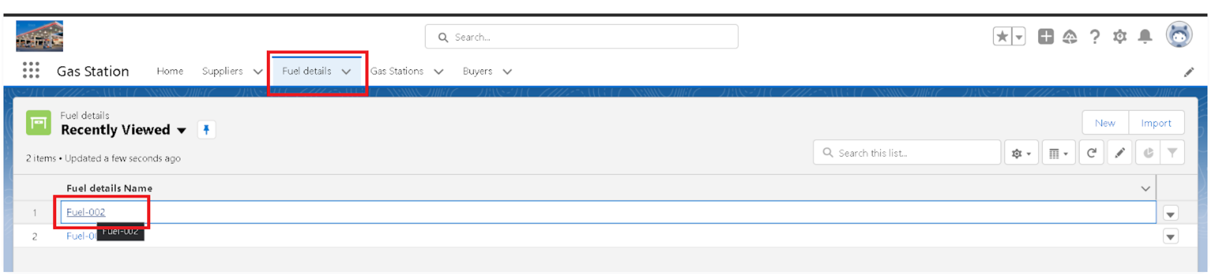
10. Followed by these create 10 more records in Buyer object.

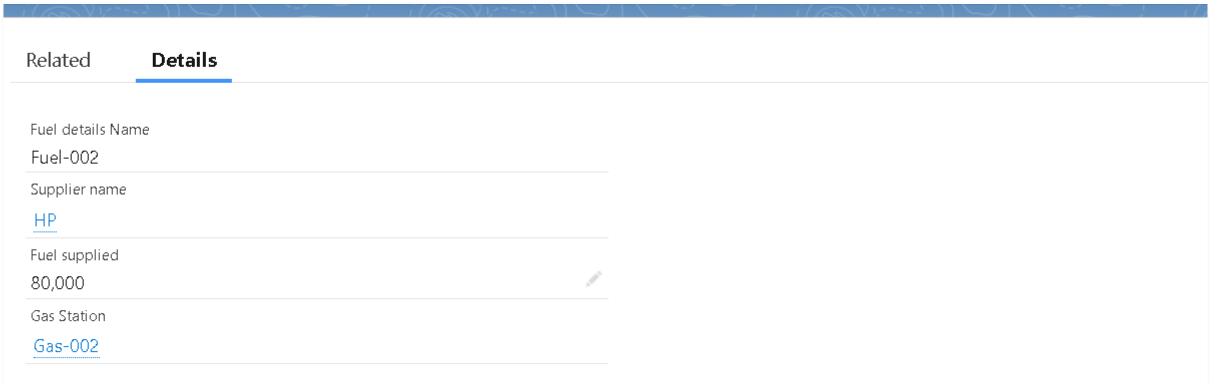
12.2 View a record

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.



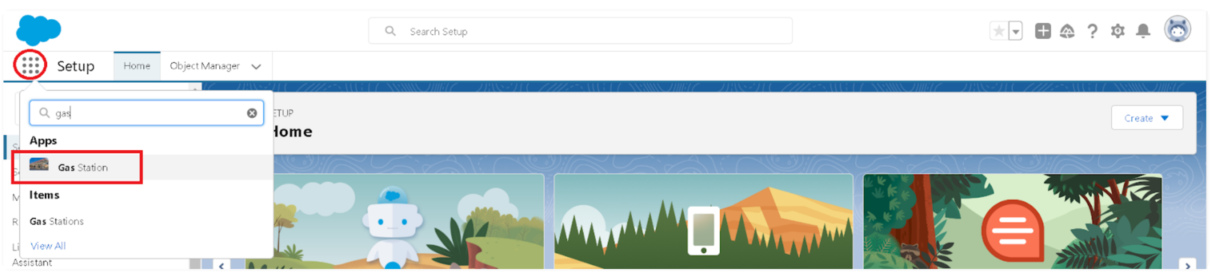


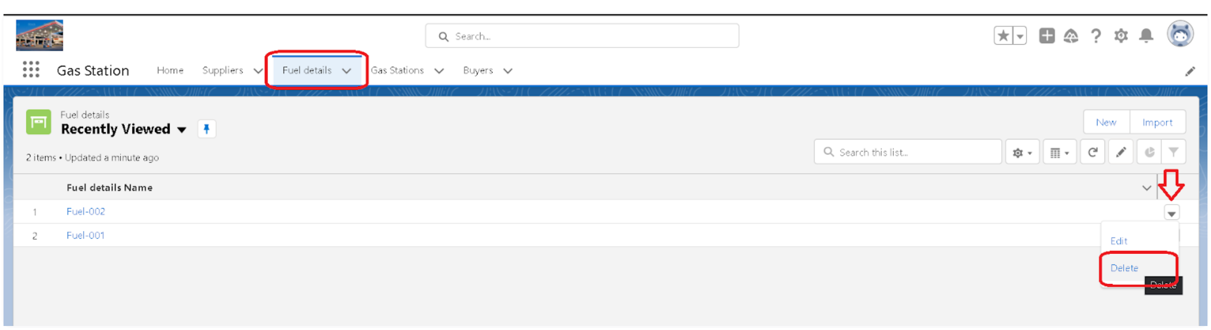


12.3 Delete a record

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

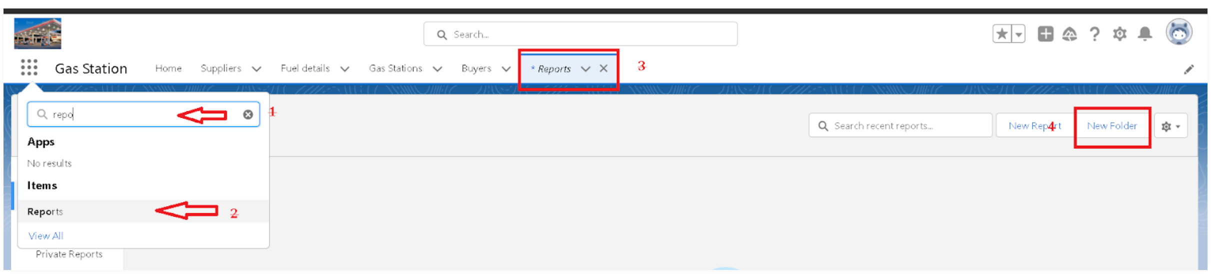
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce

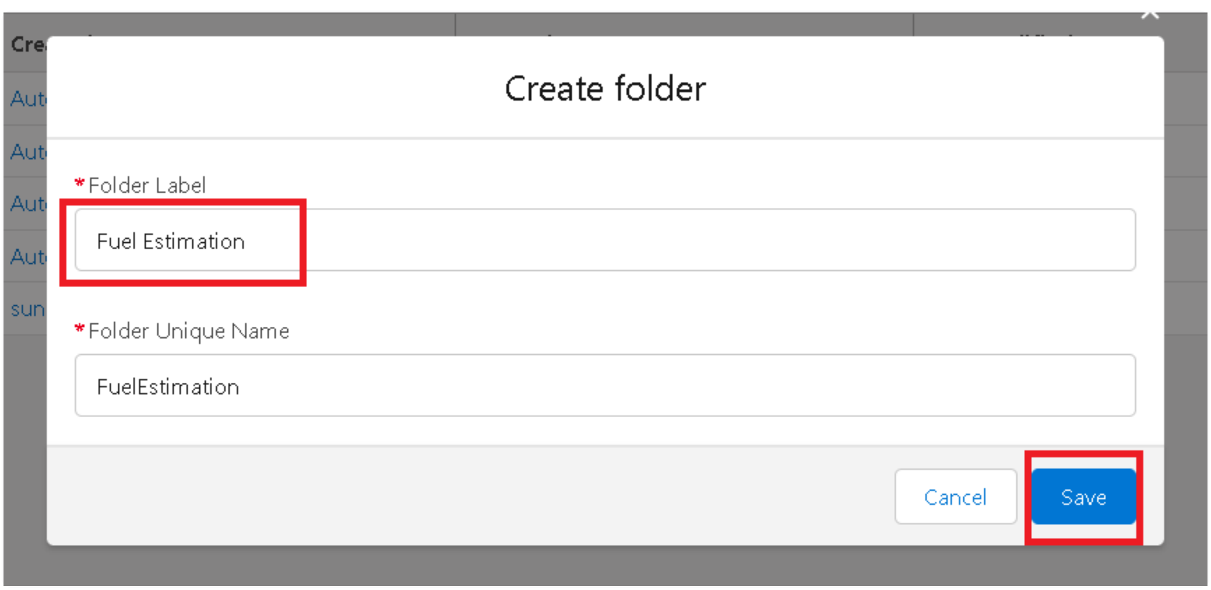
1. Tabular
2. Summary
3. Matrix
4. Joined Reports

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.

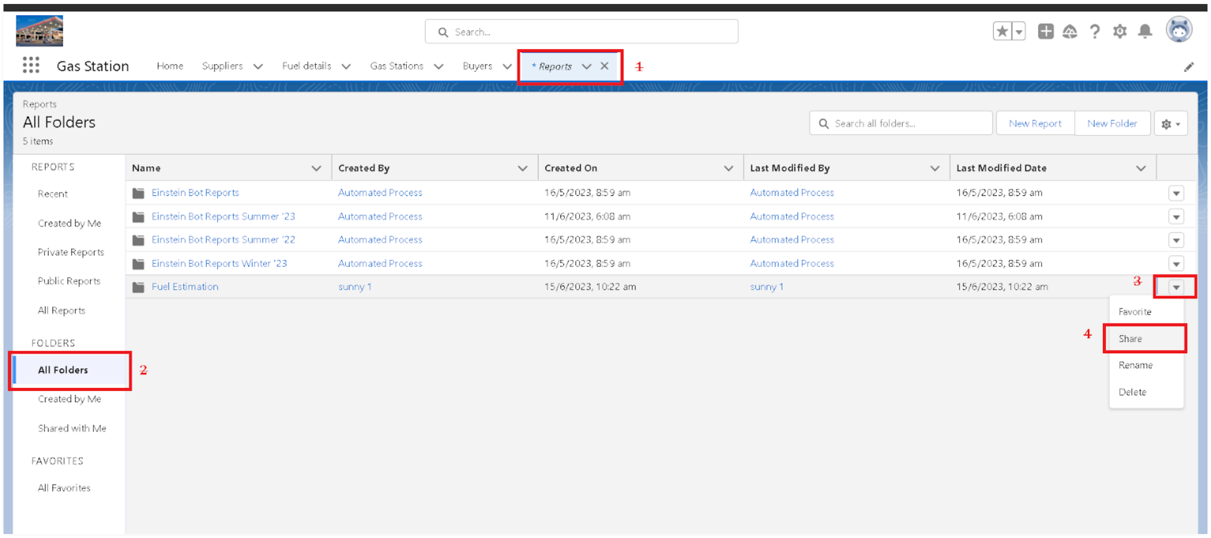


4. Give the Folder label as "Fuel Estimation ", Folder unique name will be auto populated.
5. Click save.



13.2 Sharing a report folder

1. Go to the app ? click on the reports tab.
2. Click on the All folder , click on the arrow for Fuel estimation folder, and Click on share.



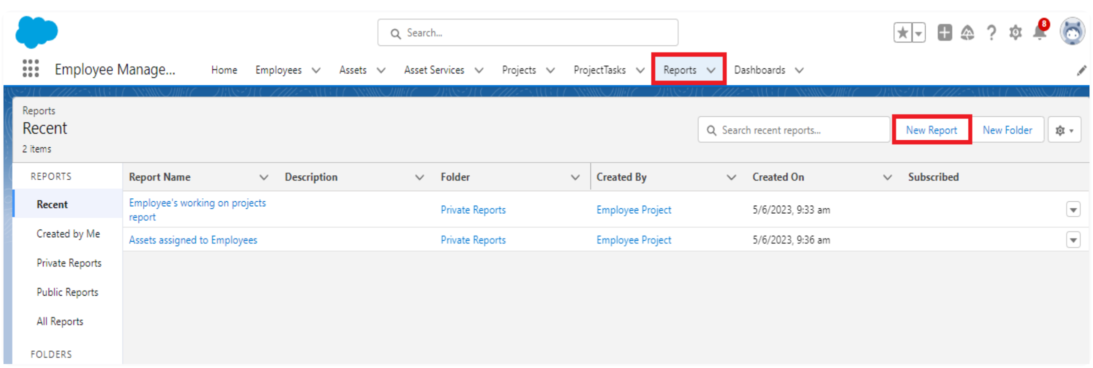
3. Select the share with as “roles”, in name field search for “manager”, give “view” as access for that role.
4. Then click share, and click on Done.

13.3 Create Report

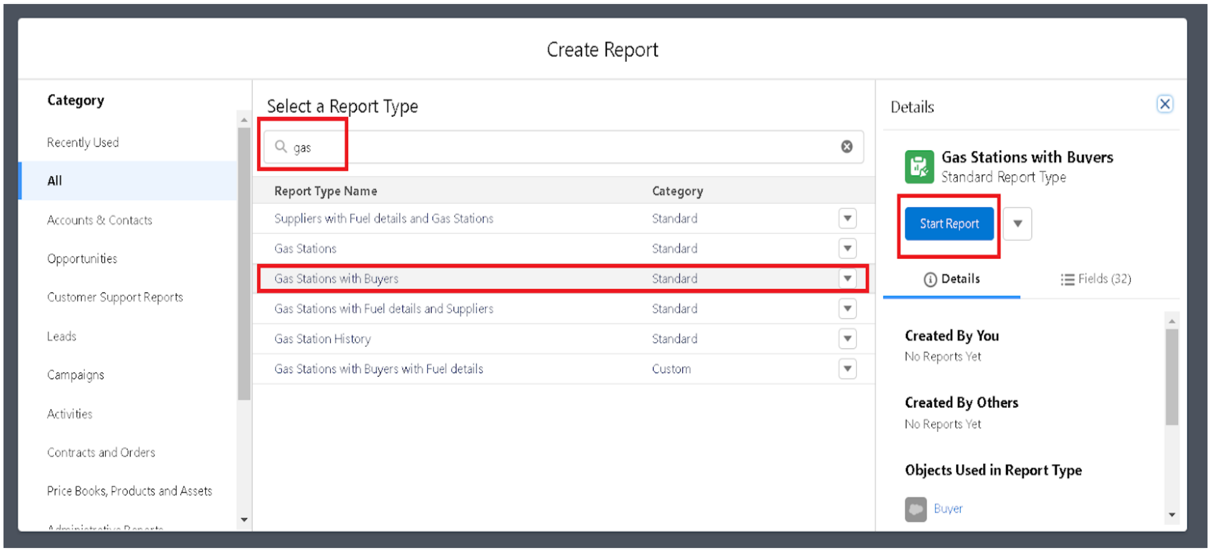
Note : Before creating report, create latest “10” records in buyer object.

Try to fill every field in each record for better experience.

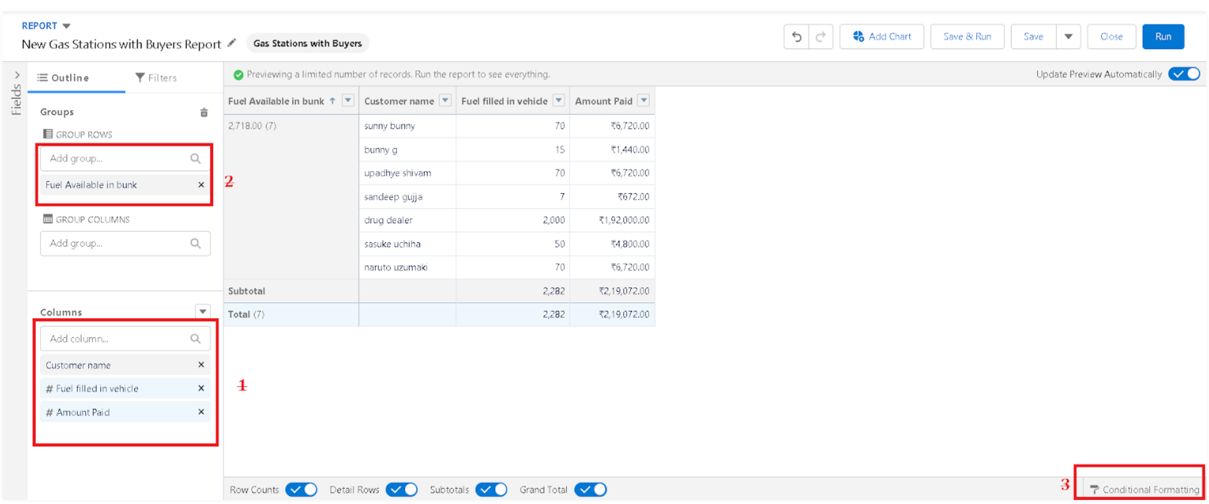
1. Go to the app ? click on the reports tab
2. Click New Report.



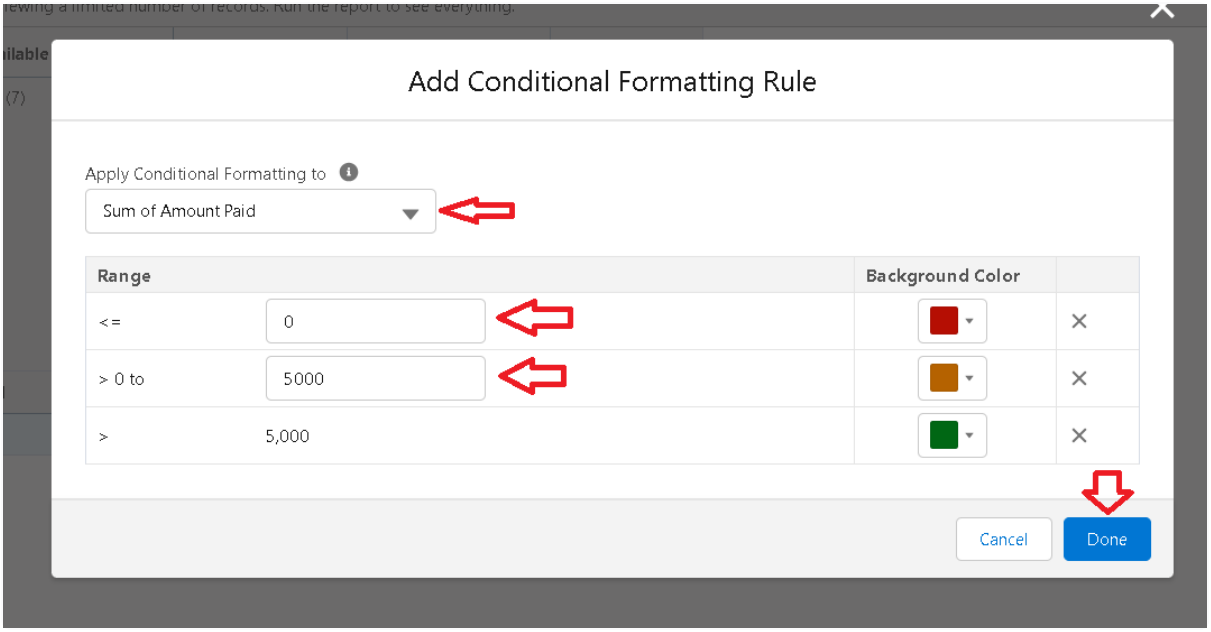
3. select for report type, search for “Gas station with buyers” click on it. And click on start report.



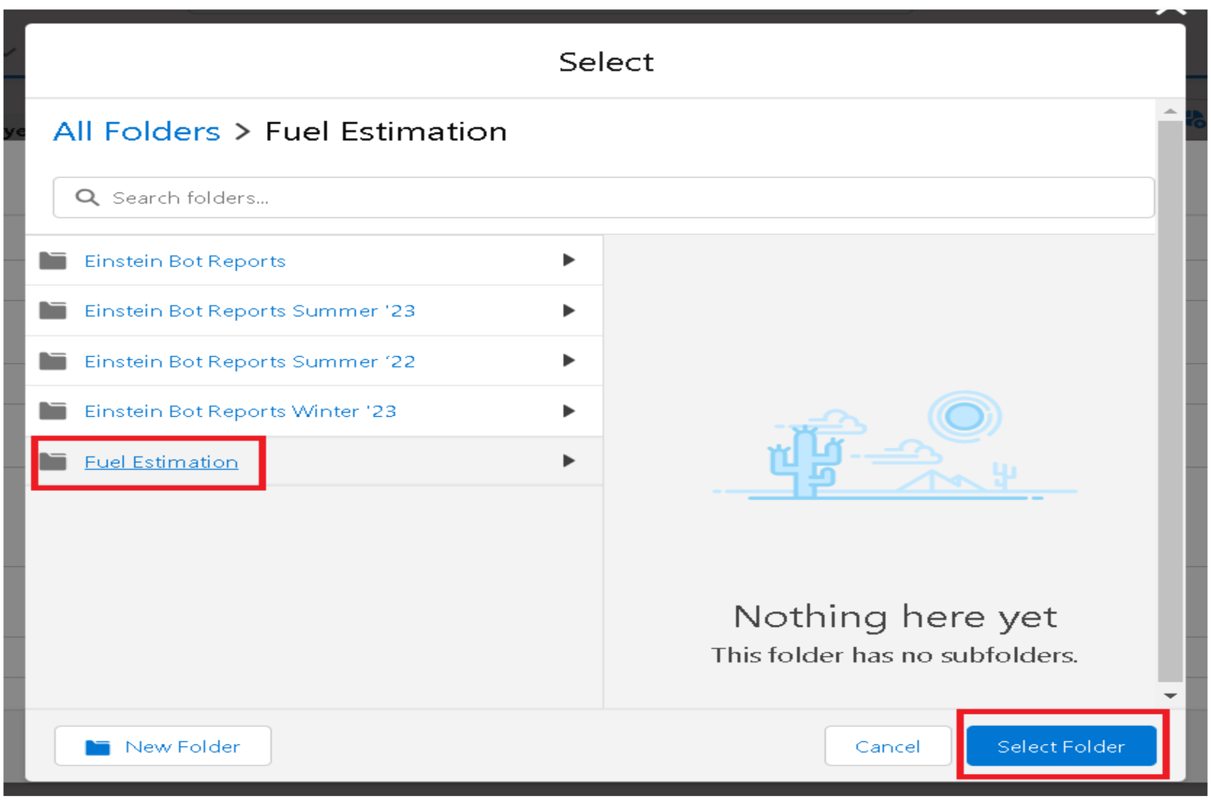
4. Their outline pane is opened alredy, select the fields that mentioned below in column section.
    1. Fuel filled in vehicle
    2. Amount paid
5. Remove the unnecessary fields.
6. Select the fields that mentioned below in GROUP ROWS section.
    1. Fuel Available in bunk
    2. Customer name



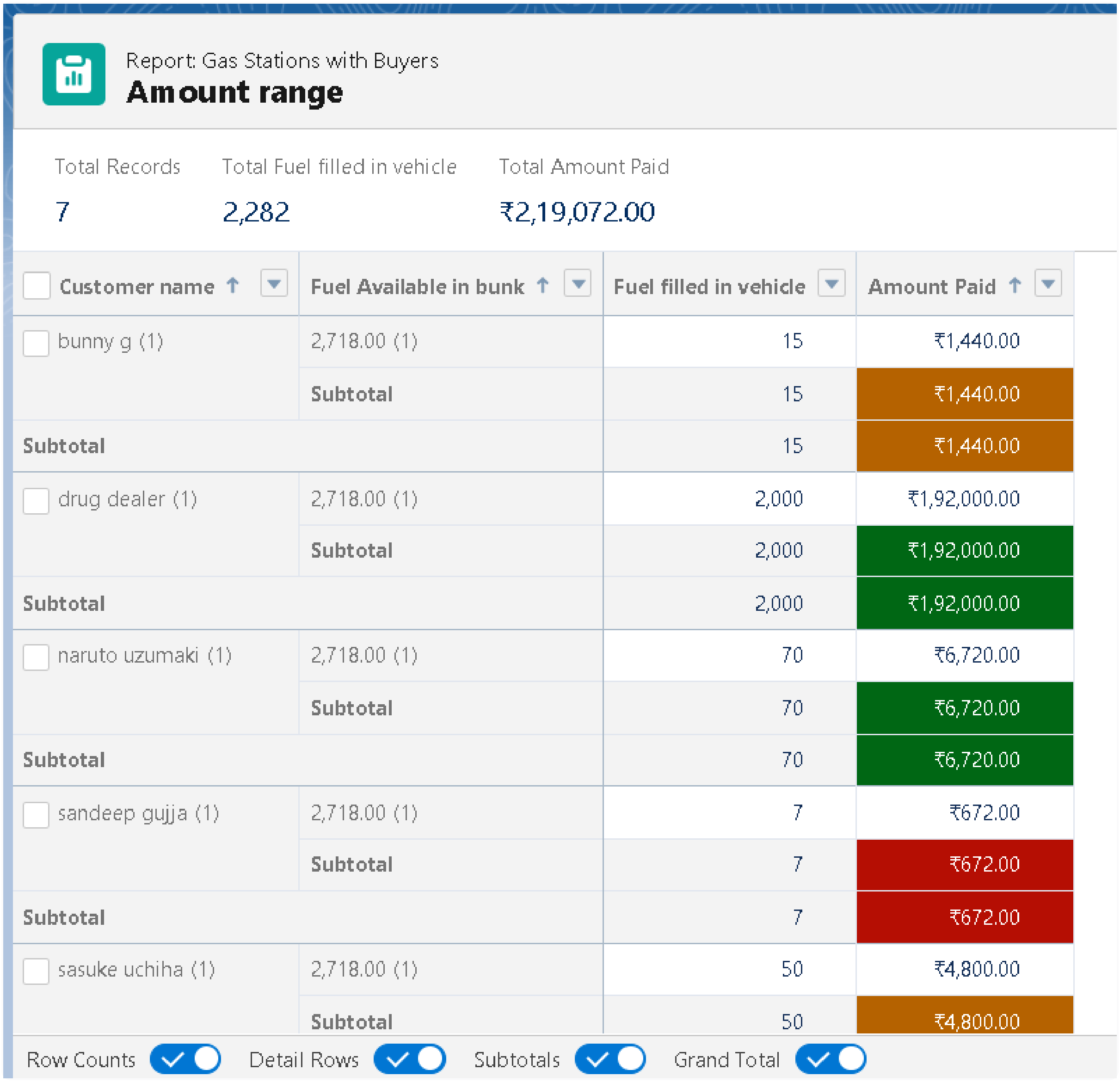
7. Click on conditional formatting located at the bottom of the preview pane.
8. Click on add conditional formatting rule.
9. Change the apply conditional formatting to “ sum of Amount paid ”.
10. Mention the range form “ 1000 to 5000 ”.
11. Dont change the colours, and click on Done.
12. Click apply.



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



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



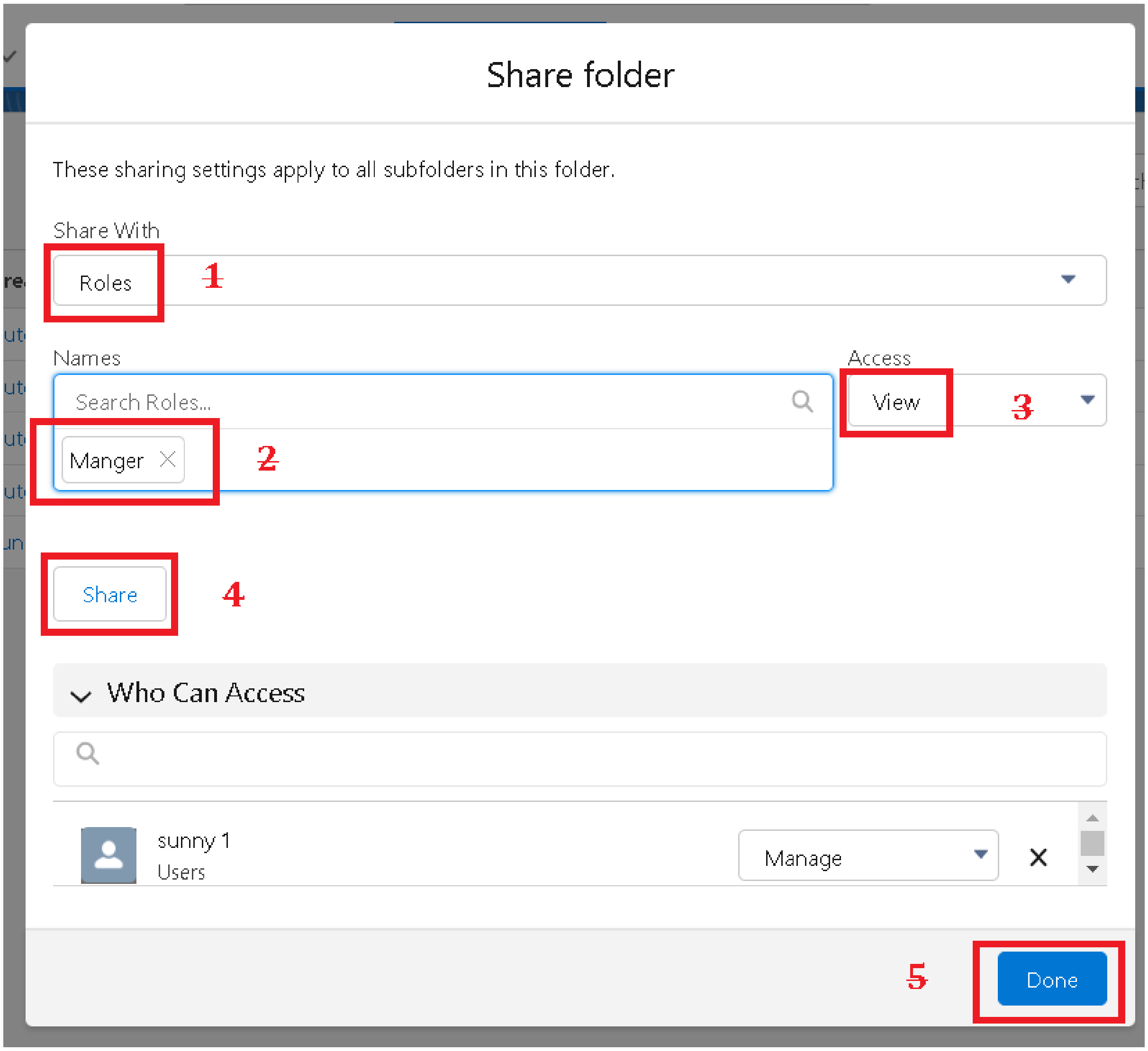
Report: Gas Stations with Buyers

Amount range

Total Records	Total Fuel filled in vehicle	Total Amount Paid
7	2,282	₹2,19,072.00

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

Row Counts Detail Rows Subtotals Grand Total

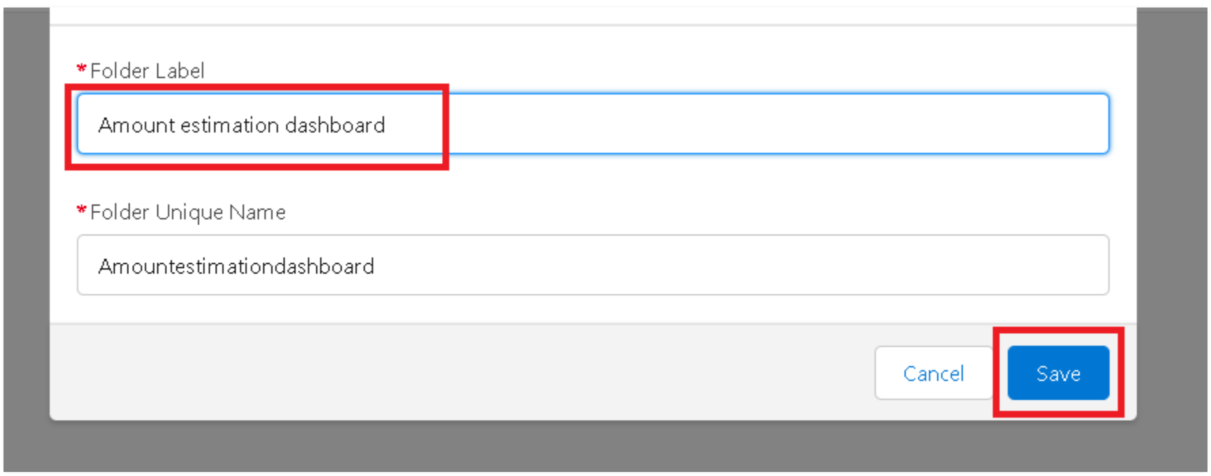

Share folder
These sharing settings apply to all subfolders in this folder.
Share With
Roles
1
Names
Search Roles...
Manger
2
Access
View
3
Share
4
Who Can Access
sunny 1
Users
Manage
5
Done

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

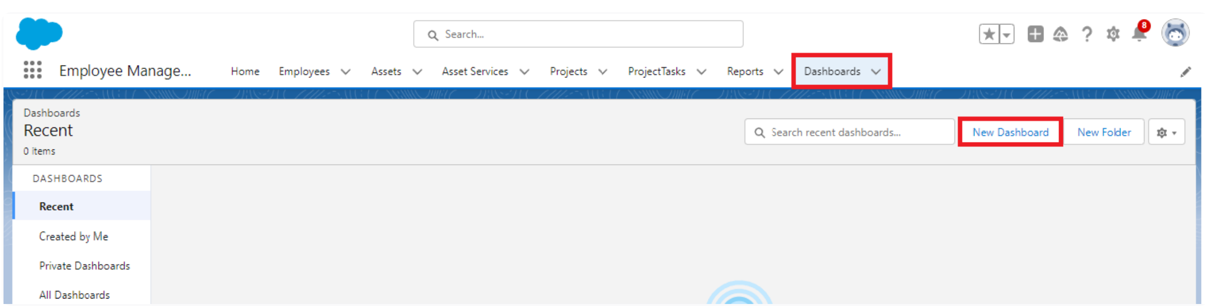
1. Click on the app launcher and search for dashboard.
2. Click on dashboard tab.
3. Click new folder, give the folder label as " Amount estimation dashboard".
4. Folder unique name will be auto populated.
5. Click save.



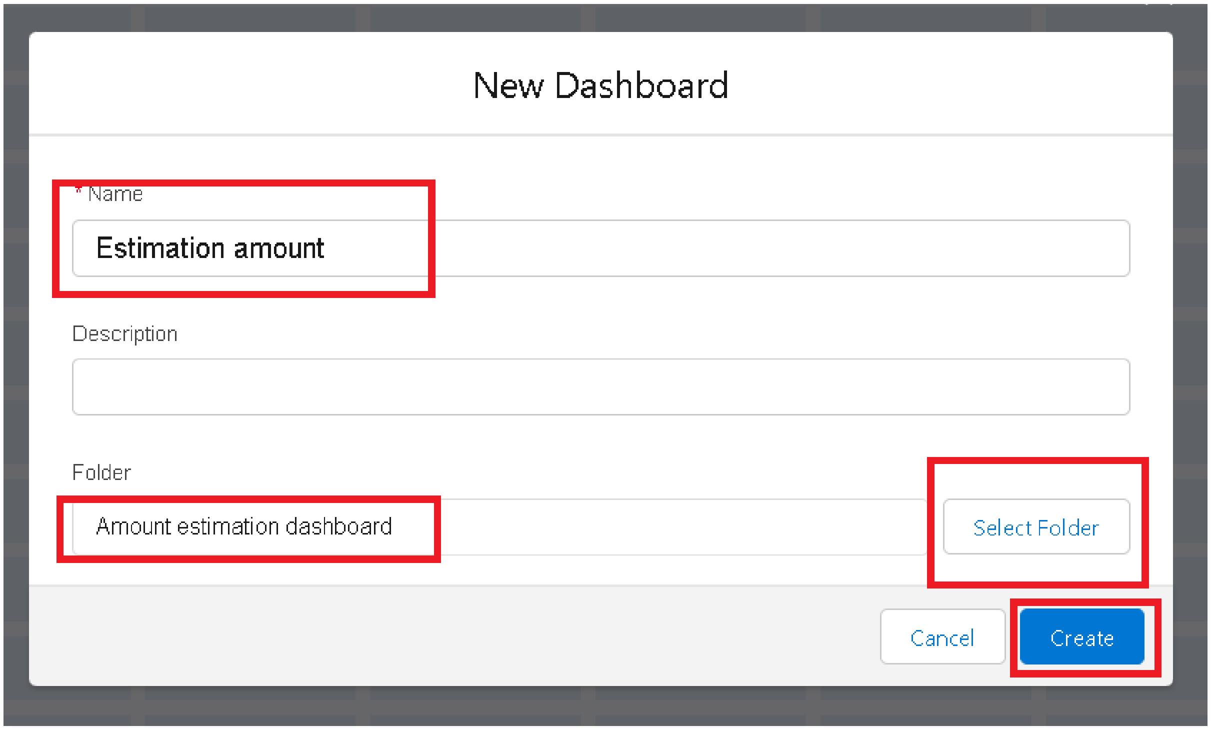
6. Follow the same steps, form milestone 12, and activity 2, and provide the sharing settings for the folder that just created.

14.2 Create Dashboard

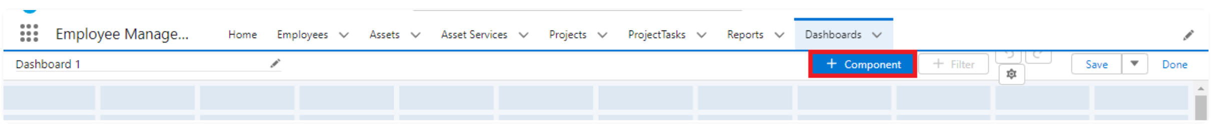
1. Go to the app ? click on the Dashboards tabs.



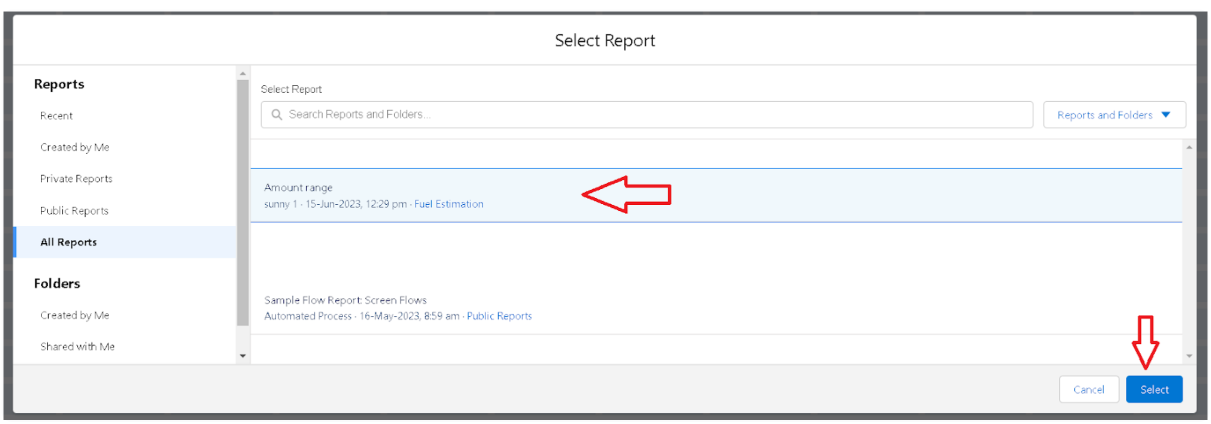
2. Give a Name and select the folder that created, and click on create.



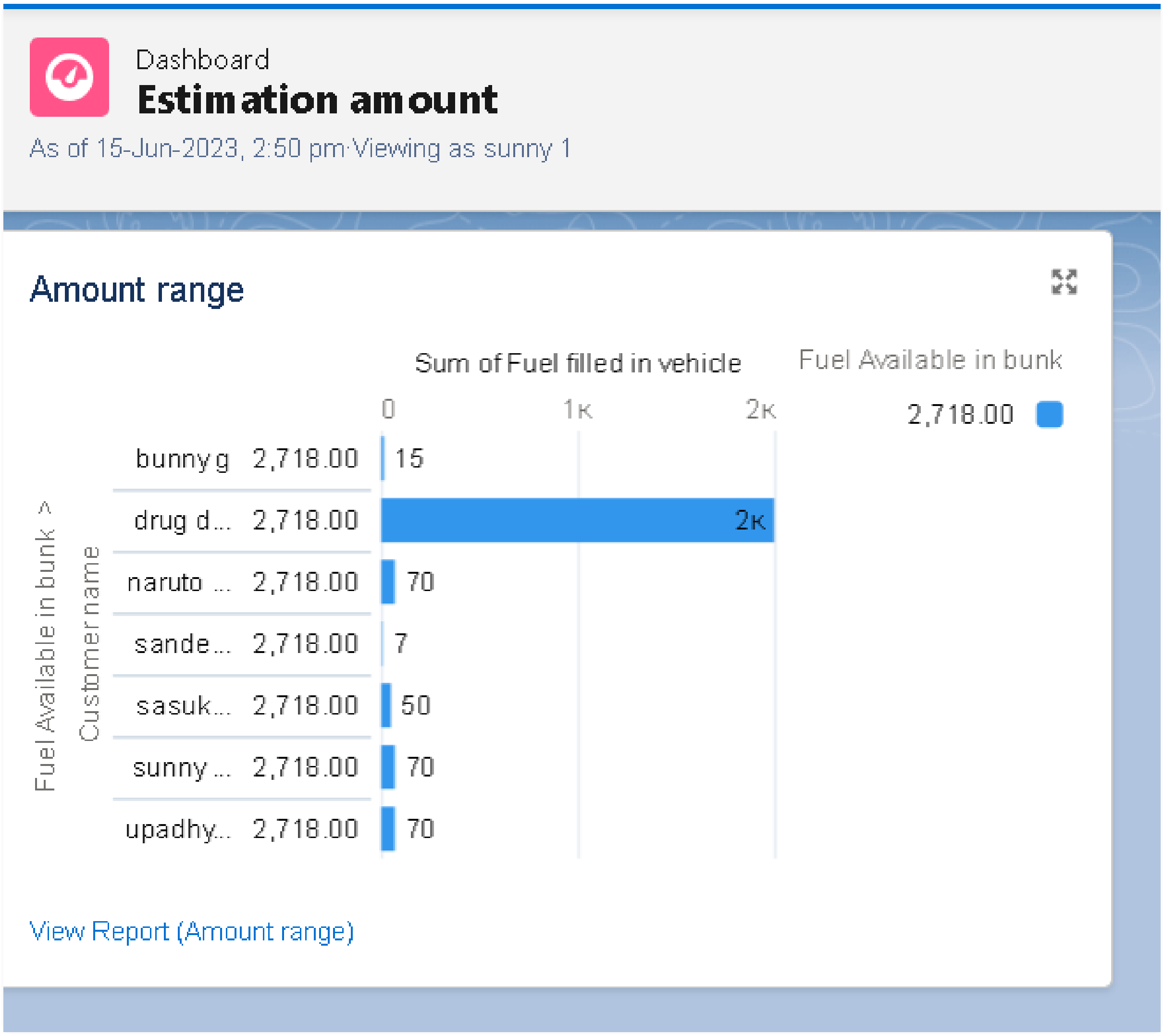
3. Select add component.



4. Select a Report and click on select.



5. Click Add then click on Save and then click on Done.
6. Preview is shown below.

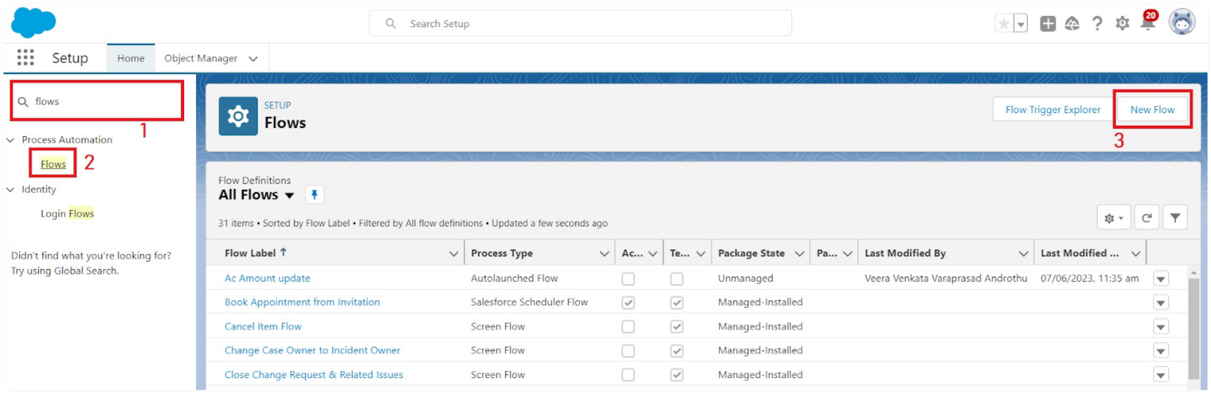

Dashboard
Estimation amount
As of 15-Jun-2023, 2:50 pm·Viewing as sunny 1
Amount range
Sum of Fuel filled in vehicle
Fuel Available in bunk
0
1K
2K
2,718.00
Fuel Available in bunk >
Customer name
bunny g 2,718.00 15
drug d... 2,718.00 2K
naruto ... 2,718.00 70
sande... 2,718.00 7
sasuk... 2,718.00 50
sunny ... 2,718.00 70
upadhy... 2,718.00 70
View Report (Amount range)

15.Flows

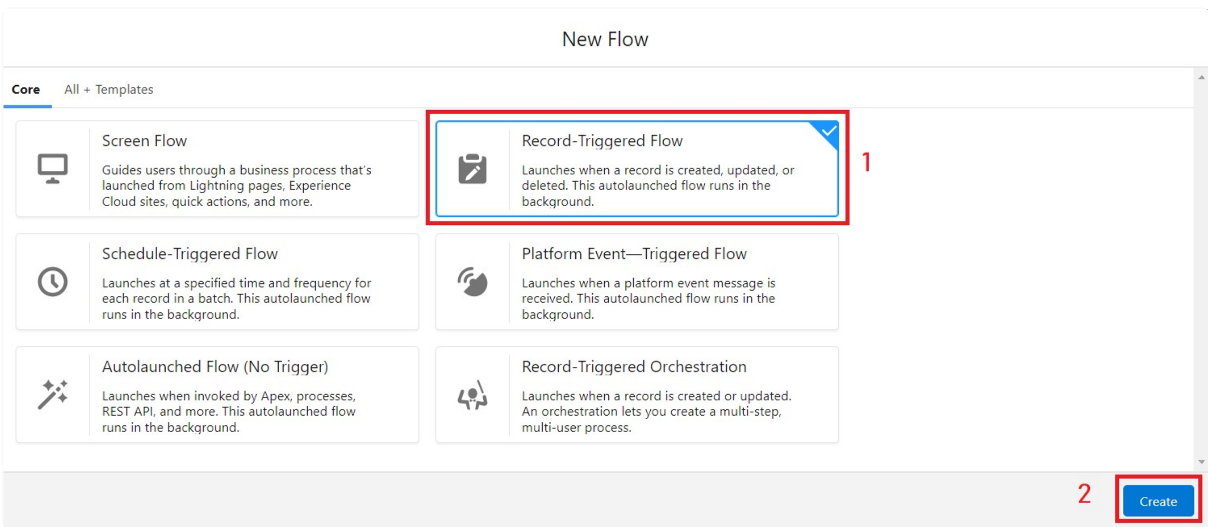
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

15.1 Create a Flow

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

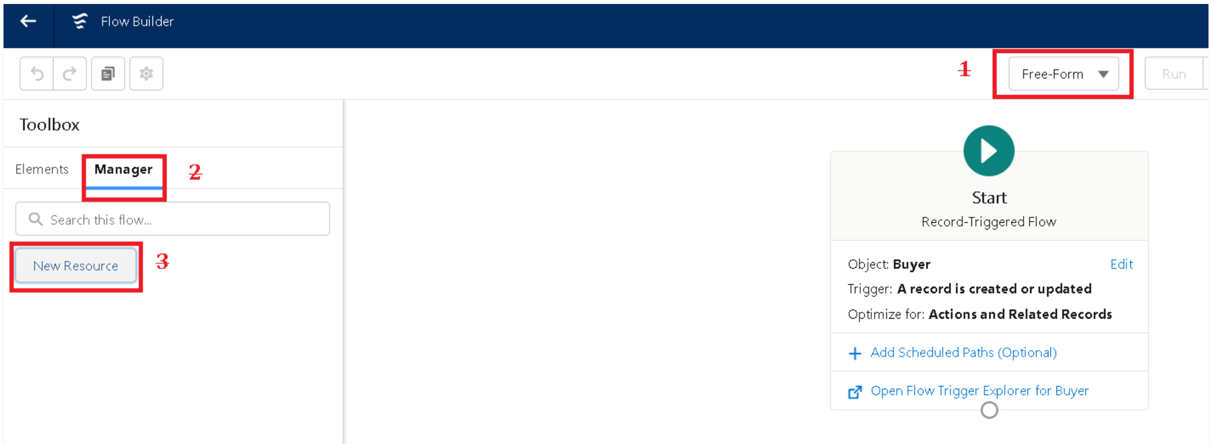


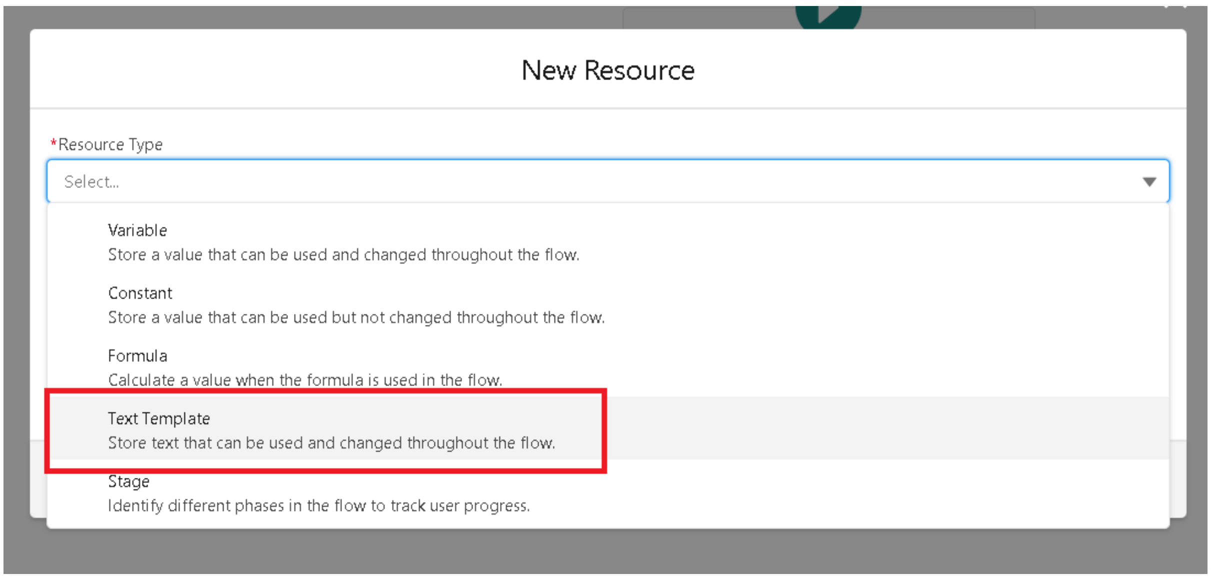
2. Select the Record-triggered flow and Click on Create.



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 :

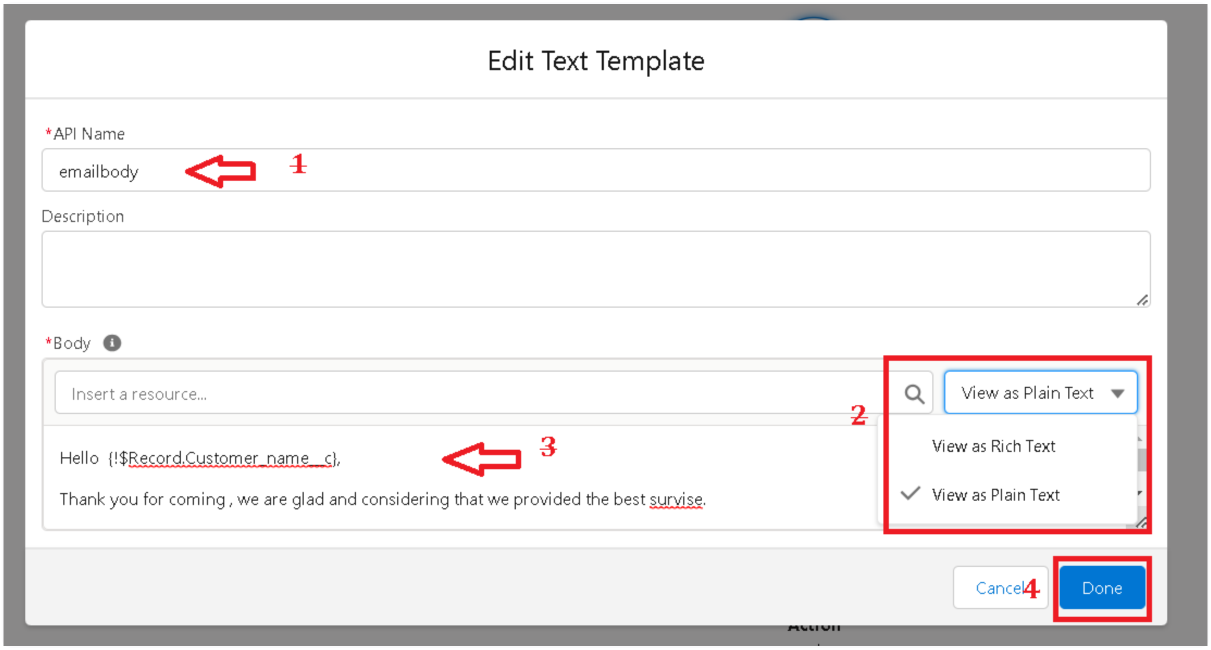
    Customer name : {!$Record.Customer_name__c}

    Amount paid by Customer : {!$Record.Amount_Paid__c}

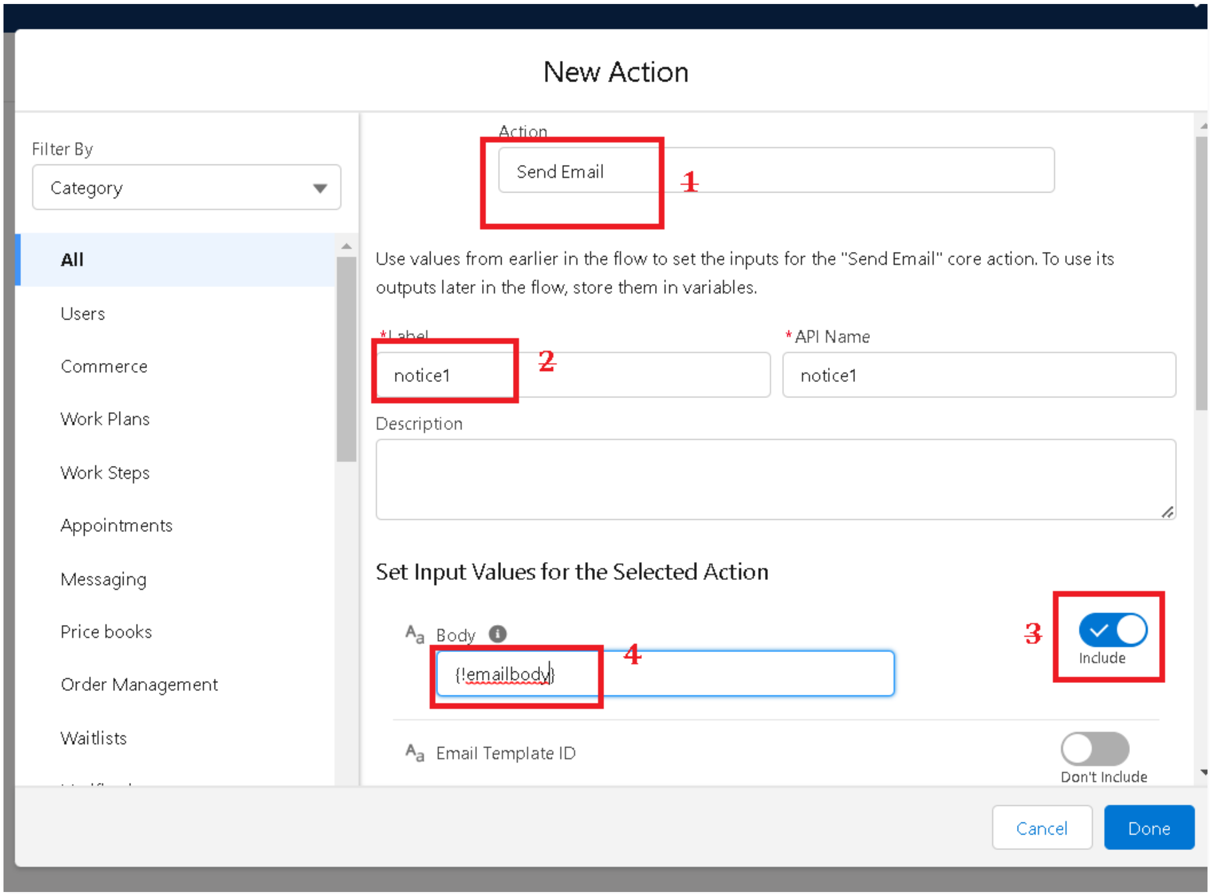
    Vehicle type : {!$Record.Vehicle_type__c}

    Fuel intake in vehicle : {!$Record.Fuel_filled_in_vehicle__c}

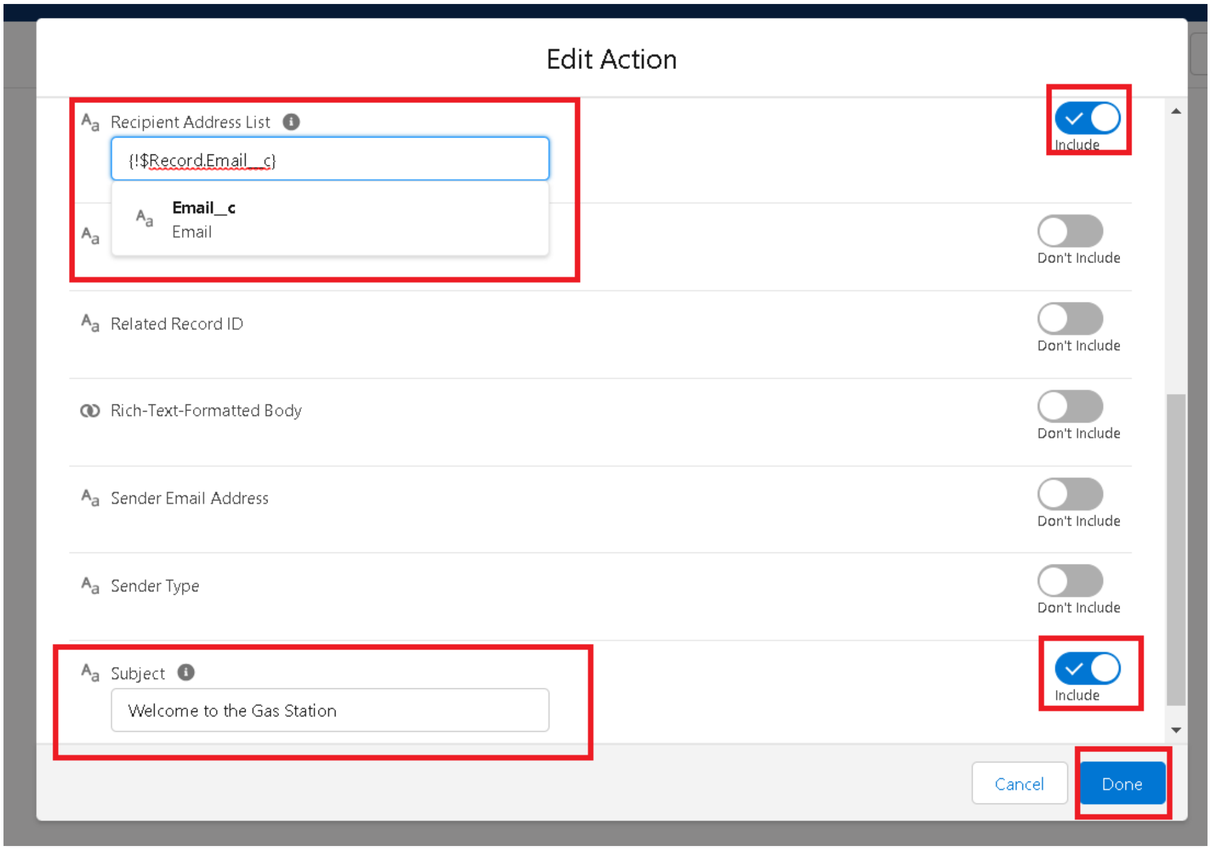
11. Change the view as Rich Text ? View to Plain Text.
12. Click done.



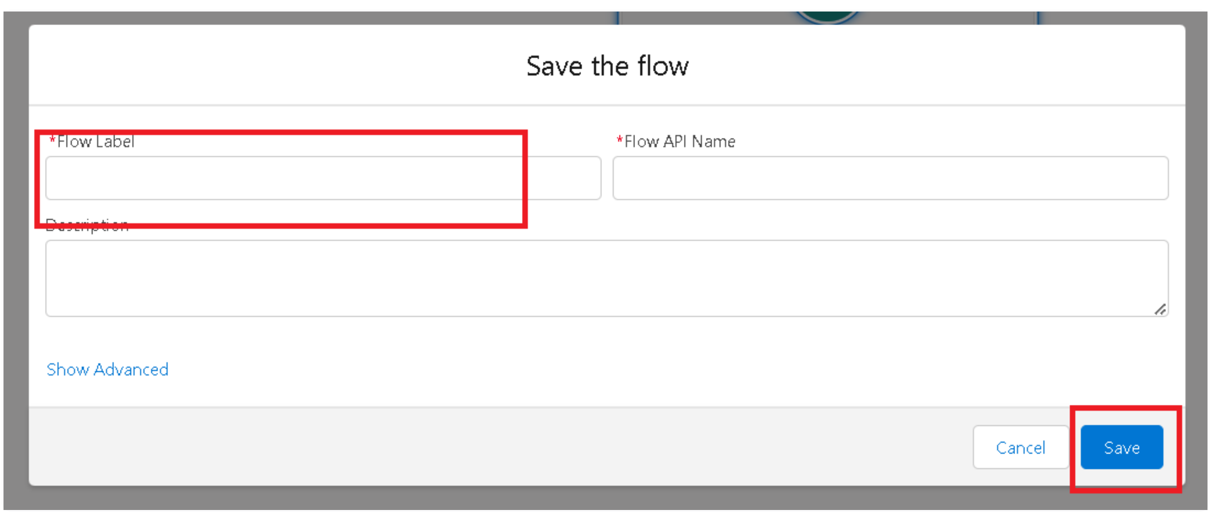
13. Now click on elements, and drag the action element into the preview pane.
14. Their action bar will be opened in that search for “ send email ” and click on it.
15. Give the label name as “ notice”
16. API name will be auto populated.
17. Enable the body in set input values for the selected action.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

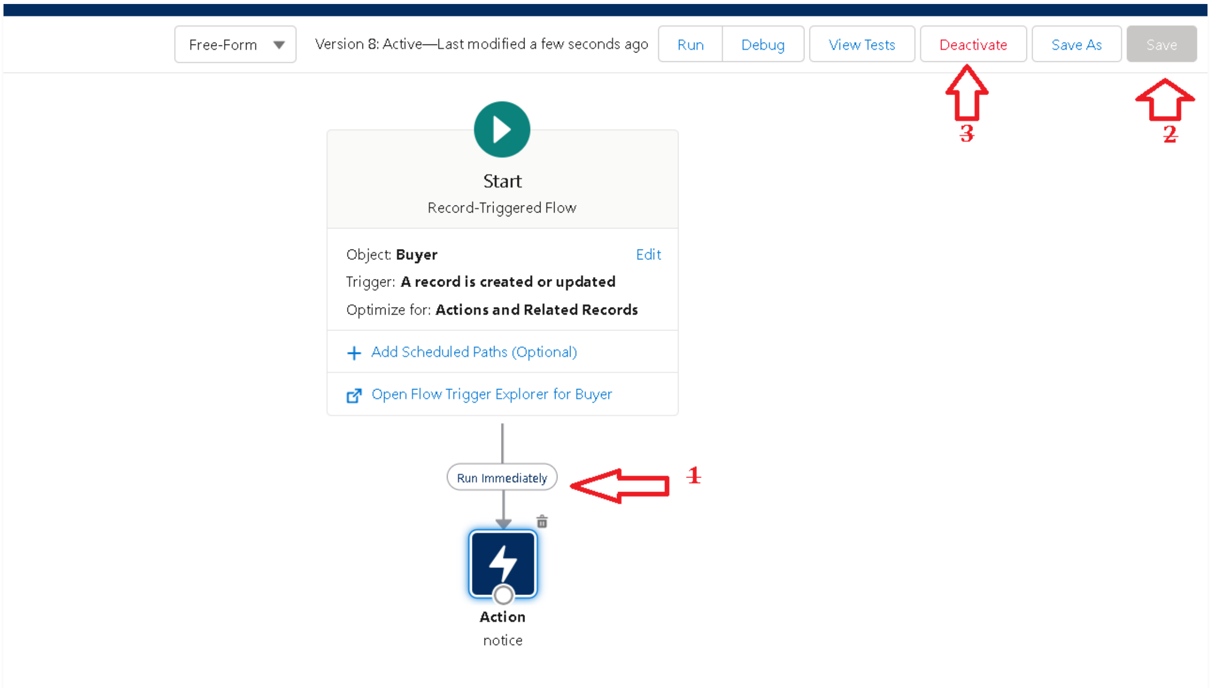


19. Include recipient address list select the email form the record.
20. Include subject as " welcome to gas station".
21. Click done.



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.




Free-Form
Version 8: Active—Last modified a few seconds ago
Run
Debug
View Tests
Deactivate
Save As
Save
3
2
Start
Record-Triggered Flow
Object: Buyer
Edit
Trigger: A record is created or updated
Optimize for: Actions and Related Records
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Buyer
Run Immediately
1
Action
notice