

# **The Gas Filling Store CRM Application**

Developed by:

D SHAFIYA BANU

[214g1a0295@srit.ac.in](mailto:214g1a0295@srit.ac.in)

## 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 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 :

The screenshot shows the sign-up page for the Salesforce Developer Edition. At the top, there's a large image of a computer monitor displaying a complex application interface with various data points and connections. Below this image, the text reads: "Build enterprise-quality apps fast to bring your ideas to life". A bulleted list follows, detailing the benefits of the platform: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". To the right of the image, the main sign-up form is displayed. It includes a heading "Sign up for your Salesforce Developer Edition" and a sub-heading "A full-featured copy of the Platform, for free". A descriptive paragraph encourages users to complete the form to start their free trial. The form itself has five fields: "First Name\*" with placeholder "Your first name", "Last Name\*" with placeholder "Your last name", "Email\*" with placeholder "Your email address", "Role\*" with placeholder "Your job role" (a dropdown menu), and "Company\*" with placeholder "Company Name".

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

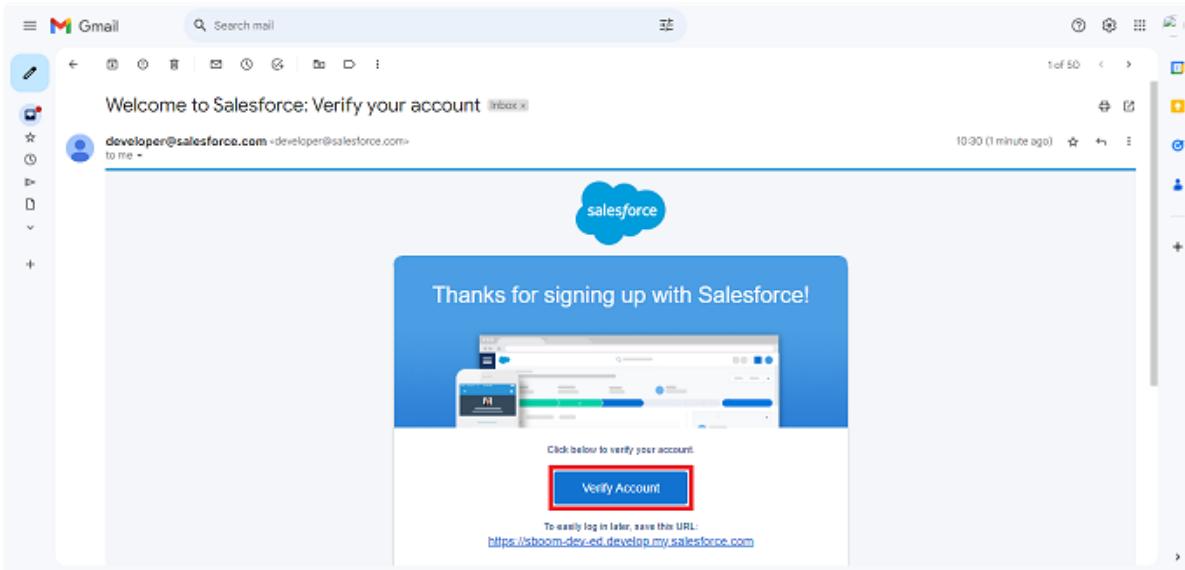
This need not be an actual email id, you can give anything in the format :

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.



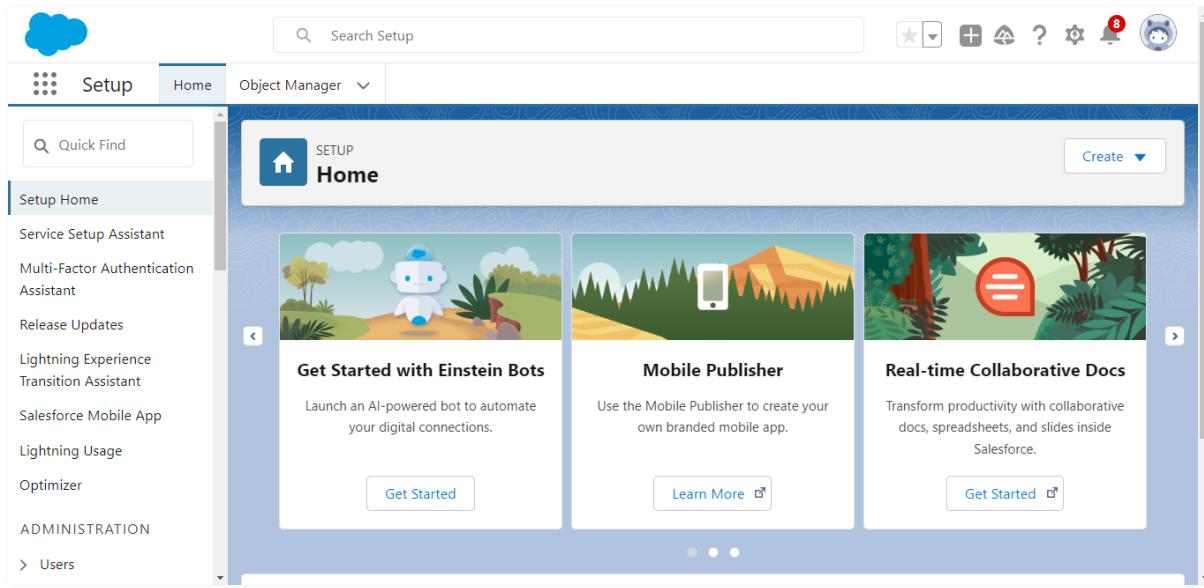
2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

The screenshot shows the "Change Your Password" page. At the top, it says "Enter a new password for lead@sb.oom." and "Make sure to include at least:" followed by three requirements with green checkmarks:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

Below these requirements is a red box highlighting the password fields. The first field is labeled "\* New Password" and contains "....." with the status "Good". The second field is labeled "\* Confirm New Password" and contains "....." with the status "Match". Underneath these fields is a "Security Question" section with the question "In what city were you born?". The answer "asdfghjkl" is entered in the "Answer" field, which is also highlighted with a red box. At the bottom of the form is a large blue "Change Password" button.

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



## 2. Object

What Is an Object?

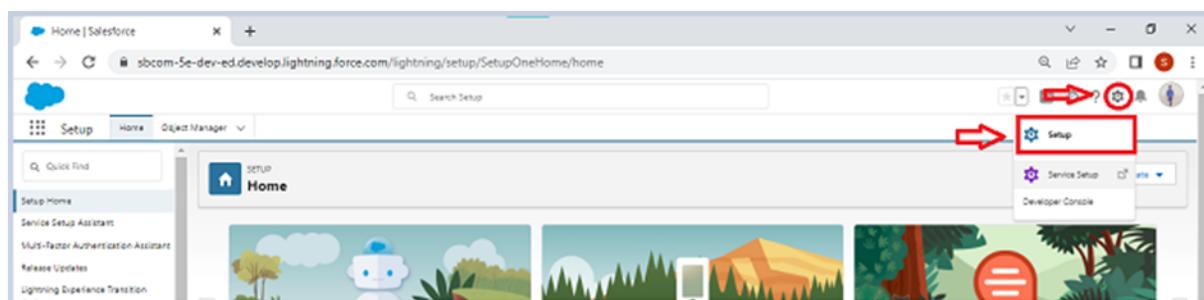
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

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.

**New Custom Object | Salesforce**

sbcom-5e-dev-ed.lightning.force.com/lightning/setup/ObjectManager/new

**SETUP**    Home    Object Manager

**New Custom Object**

**Custom Object Definition Edit**

**Custom Object Information**

The singular and plural labels are used in lists, page layouts, and search results.

**Label:**  Example: Account **Plural Label:**  Example: Accounts **Starts with new record:**

The Object Name is used when referencing the object via the API.

**Object Name:**  Example: Account **Description:**

**Context-sensitive help setting:**  Open the standard Salesforce.com Help & Training window  Open a window using a Visualforce page **Content Name:**

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key fields, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

**Record Name:**  Example: Account Name **Data Type:**

**Optional Features**

- Allow Reports **Allow Activities:**
- Track Field History
- Allow in Chatter Groups
- Enable Licensing

**Object Classification**

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#)

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

**Deployment Status**

- In Development
- Deployed

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#)

- Allow Search

**Object Creation Options (Available only when custom object is first created)**

- Add Notes and Attachments related list to default page layout
- Launch New Custom Tab Wizard after saving this custom object

**Save** **Save & New** **Cancel**

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.

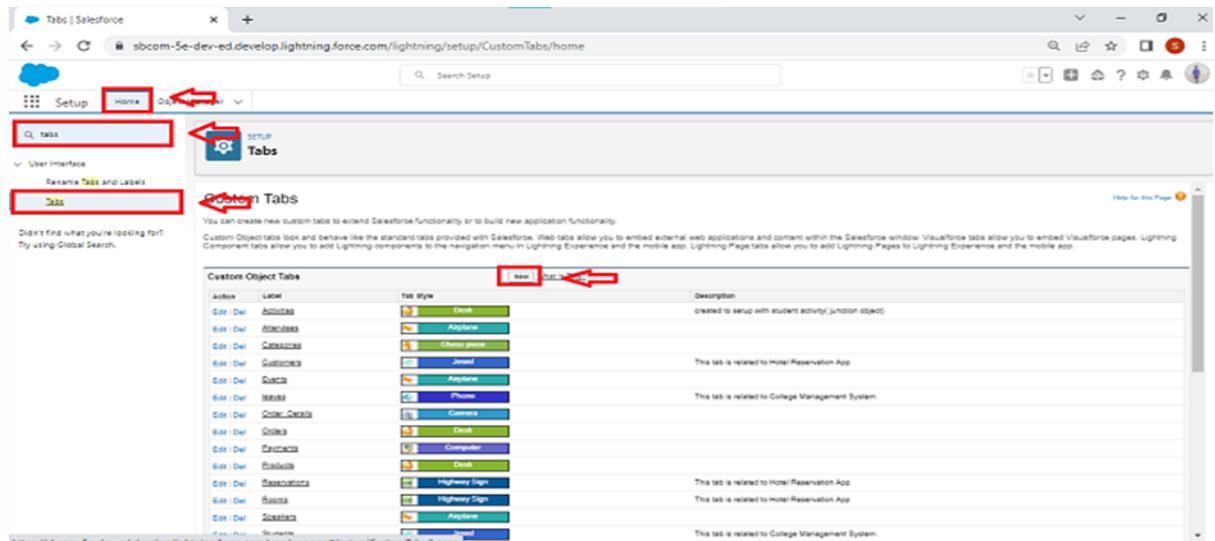
#### 5. Lightning Page Tabs :

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.

**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](#)

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

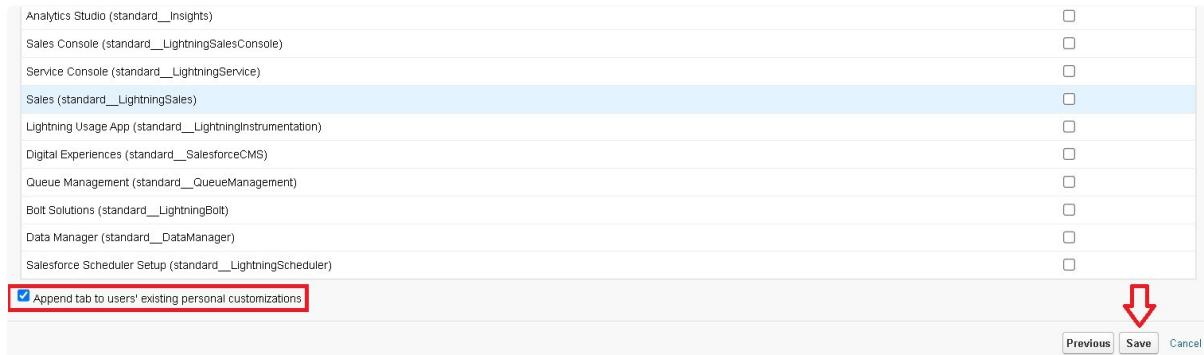
**Save** **Cancel**

**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"/>	



## 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

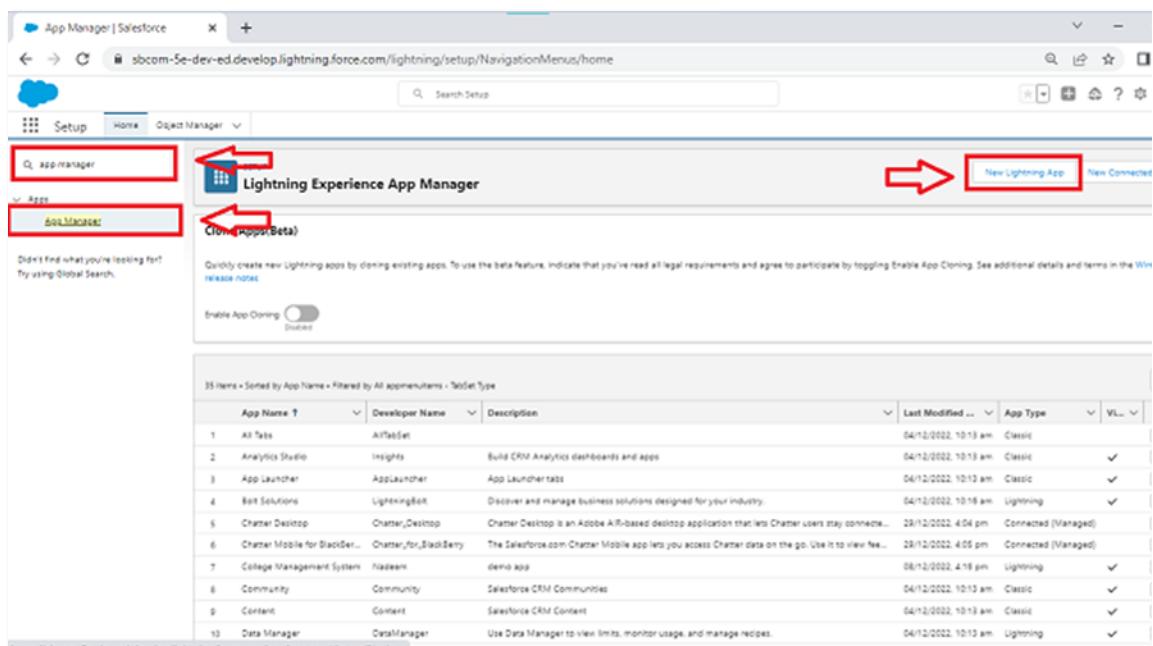
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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.

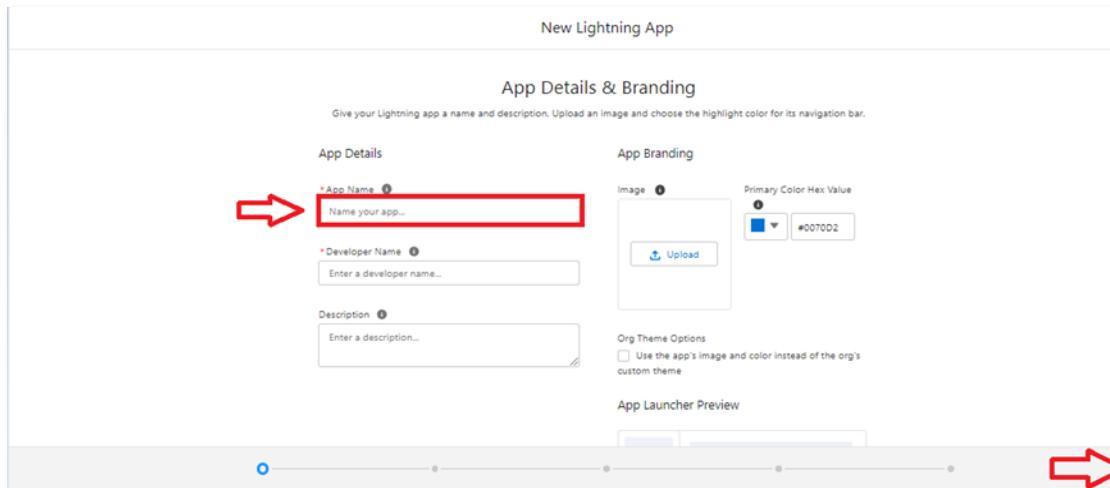
## 4.1 Create a Lightning App

To create a lightning app page:

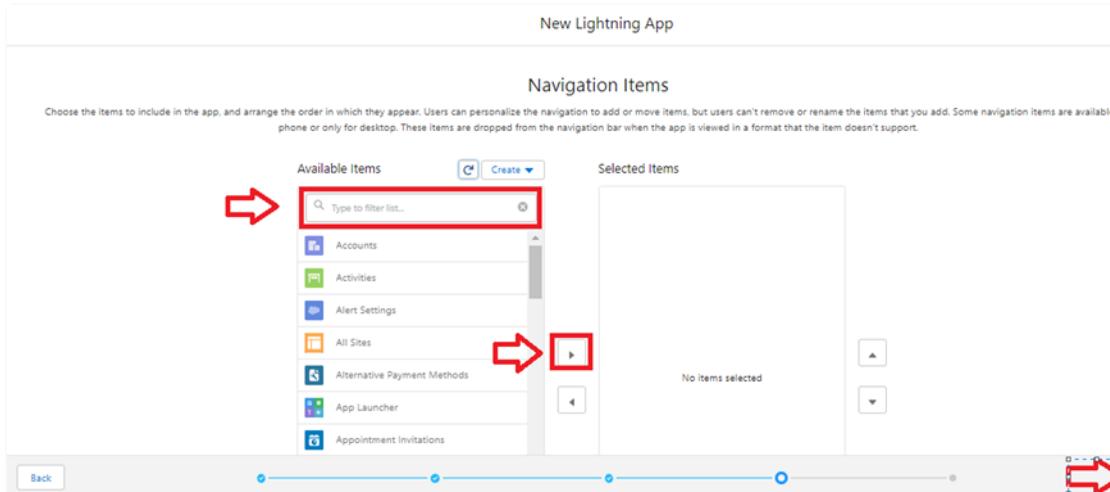
1. Go to setup page ? search “app manager” in quick find ? select “app manager”  
? click on New lightning App.



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.

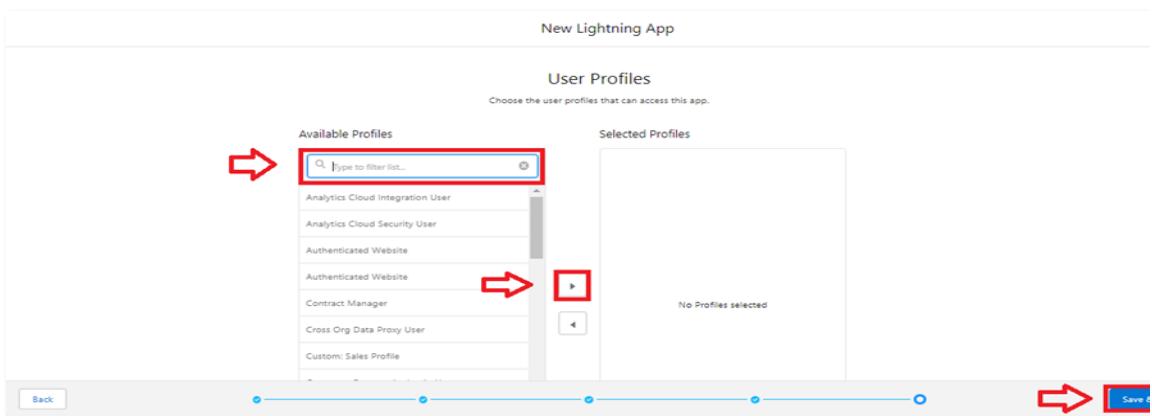


3. To Add Navigation Items:



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.

The screenshot shows the Salesforce Object Manager interface. A red box highlights the 'Object Manager' tab in the top navigation bar. Another red box highlights the 'Create' button in the top right corner of the main content area. The table below lists two objects: 'Student' (Custom Object) and 'Student\_Activity' (Custom Object). The 'Student' row is selected.

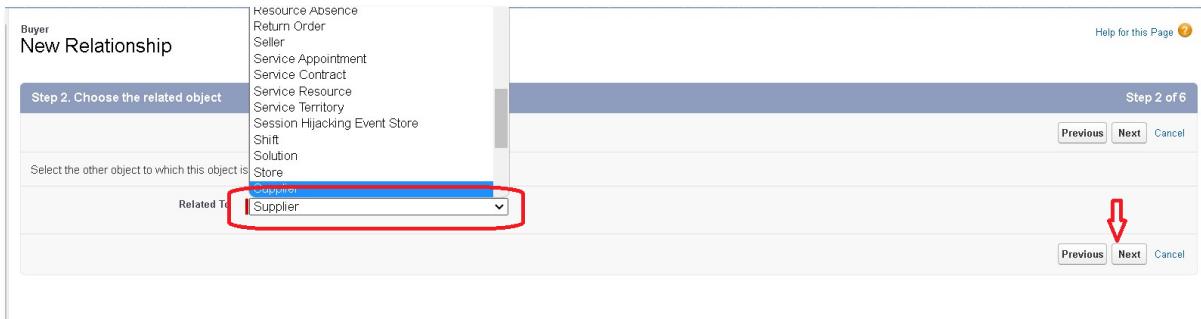
2. Click on fields & relationship ? click on New.

The screenshot shows the 'Fields & Relationships' page for the 'Supplier' object. A red box highlights the 'Fields & Relationships' tab in the left sidebar. Another red box highlights the 'New' button at the top right of the table. The table lists several fields: 'Created By', 'Last Modified By', 'Owner', 'Sum of Fuel supplied', and 'supplier Name'. The 'supplier Name' field is currently selected.

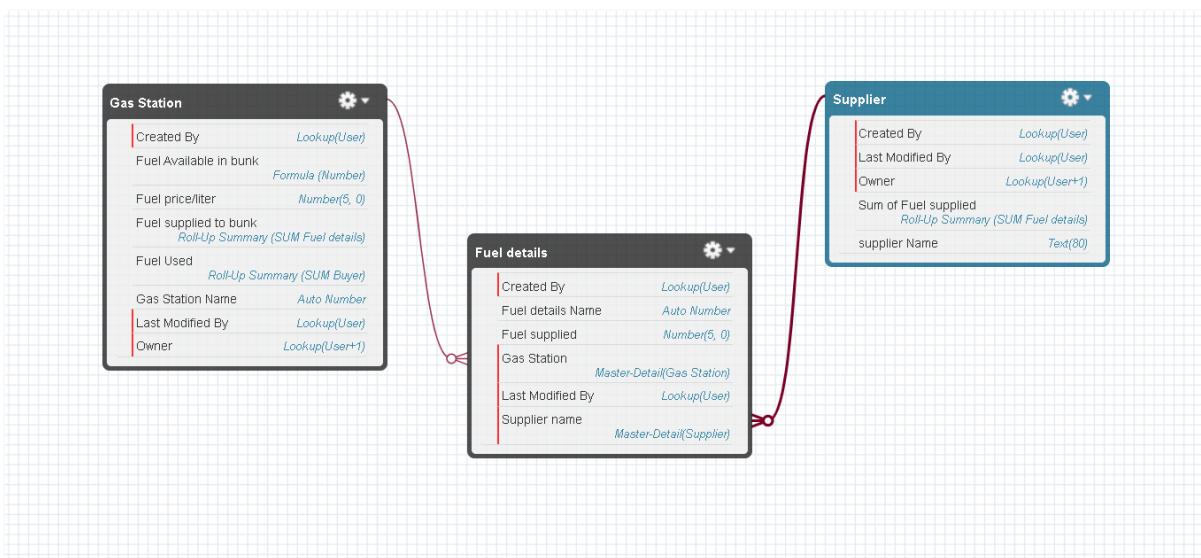
3. Select “Master-Detail relationship” as data type and click Next.

The screenshot shows the 'Data Type' configuration screen. A red box highlights the 'Master-Detail Relationship' option in the list. The 'None Selected' option is also shown. The 'Next' button is visible at the top right.

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 ”.

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label

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  Number of digits to the left of the decimal point

Decimal Places  Number of digits to the right of the decimal point

Field Name

Description

Help Text

Required  Always require a value in this field in order to save a record

Unique  Do not allow duplicate values

External ID  Set this field as the unique record identifier from an external system

AI Prediction  Use this field to store AI prediction scores

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

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.

The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with 'Search Setup'. Below it, a navigation bar with 'Setup', 'Home', and 'Object Manager' (which is highlighted with a red box and has a red arrow pointing to it). On the right side of the header, there's a search bar with 'Student' and a 'Create' button. The main area displays a table with two rows. The first row is for the 'Student' object, which is highlighted with a red box and has a red arrow pointing to its 'Label' column. The second row is for 'Student\_Activity'. The columns in the table are 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'.

## 2. Now click on "Fields & Relationships" ? New

The screenshot shows the 'Fields & Relationships' configuration screen for the 'Student' object. The left sidebar lists various setup options like Page Layouts, Record Types, and Field Sets. The main area shows a table of fields. A red box highlights the 'Fields & Relationships' tab in the sidebar, and a red arrow points to it. Another red box highlights the 'New' button at the top right of the table, and a red arrow points to it. The table columns are 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'.

## 3. Select the data type as "Rollup summary ",and click Next.

The screenshot shows the 'Data Type' selection step in the custom field creation wizard. It asks to specify the type of information the custom field will contain. The 'None Selected' option is selected. Other options shown are 'Auto Number', 'Formula', 'Roll-Up Summary' (which is highlighted with a red box and has a red arrow pointing to it), 'Lookup Relationship', and 'Master-Detail Relationship'. The 'Next' button is visible at the top right.

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

The screenshot shows the 'Step 2. Enter the details' step in the custom field creation wizard. It has five tabs at the top: 'Step 2 of 5', 'Previous', 'Next', and 'Cancel'. The 'Field Label' field contains 'Sum of Fuel supplied' (highlighted with a red box and has a red arrow pointing to it). The 'Field Name' field contains 'Sum\_of\_Fuel\_supplied'. There are 'Description' and 'Help Text' fields below. At the bottom, there are checkboxes for 'Auto add to custom report type' and 'Add this field to existing custom report types that contain this entity' (the second one is checked). The 'Next' button is visible at the top right.

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.

Step 3. Define the summary calculation

Step 3 of 5

**Select Object to Summarize**

Master Object: Supplier  
Summarized Object: **Fuel details**

**Select Roll-Up Type**

COUNT  
 SUM  
 MIN  
 MAX

Field to Aggregate: **Fuel supplied**

Filter Criteria

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

**I = Required Information**

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.

**Step 2. Choose output type**

Field Label  Field Name  **Next** **Cancel**

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: `[Start Date = Now() + 1]`

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_o) / Amount]`

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 subtab to use additional fields, operators, and functions.

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

**Simple Formula** **Advanced Formula**

**Insert Field** **Insert Operator**

`FuelAvailableInBunk( Number ) =`  **Insert Selected Function**

`Fuel_supplied_to_bunk_c - Fuel_Used_c`

**Functions**

- All Function Categories
- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

## 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 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 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.

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: `New = NOW() + 1`

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`

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 Editor

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

-- All Function Categories --

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

## 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.

The screenshot shows the 'Step 2. Enter the details' configuration page for a new field. The 'Field Label' is set to 'Vehicle type'. Under 'Values', the 'Enter values, with each value separated by a new line' option is selected, and the input field contains the following values:  
Two Wheeler  
Three Wheeler  
Four Wheeler  
Six Wheeler  
Eight Wheeler  
Others

Below the input field, there are three checkboxes:  
 Display values alphabetically, not in the order entered  
 Use first value as default value  
 Restrict picklist to the values defined in the value set

The 'Field Name' is set to 'Vehicle\_type'. The 'Description' field is empty.

At the top right, it says 'Step 2 of 4' with buttons for 'Previous', 'Next' (highlighted with a red arrow), and 'Cancel'.

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.

**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**

Save | Save & New | Cancel

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

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

## 6.1 Creating the page layout

To Create a Page layout:

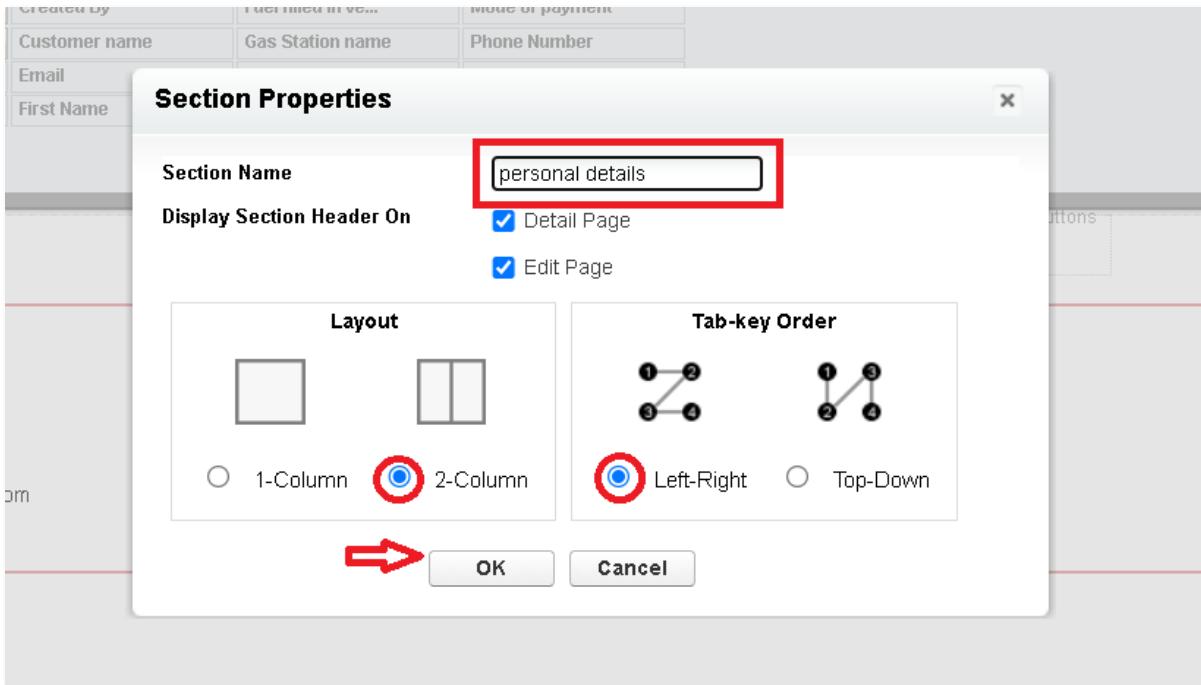
1. Go to Setup ? Click on Object Manager ? Search for the object (Buyer) ? From drop down select the object and click on it.
2. Click on Page layout ? Click on New.

The screenshot shows the Salesforce Object Manager interface for the 'Buyer' object. In the center, there is a table titled 'Page Layouts' with one item listed: 'Customer Layout'. The columns are 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. To the left of the table, there is a sidebar with tabs: 'Details', 'Fields & Relationships', 'Page Layouts' (which is selected and highlighted in blue), and 'Lightning Record Pages'. At the top right of the main area, there are buttons for 'Quick Find', 'New', and 'Page Layout Assignment'. Red arrows point from the text in step 3 to the 'Customer Layout' row and the 'New' button.

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. It has a header 'Create New Page Layout' and 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 is a section with 'Existing Page Layout' set to 'custom page' and 'Page Layout Name' set to 'customer layout'. At the bottom are 'Save' and 'Cancel' buttons. Red arrows point from the text in step 4 to the 'Existing Page Layout' dropdown and the 'Page Layout Name' input field.

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.

Section	Created By	Fuel filled in ve...	Mode of payment
Customer name	Gas Station name	Phone Number	

Section	Customer name	Gas Station name	Phone Number
Blank Space			

Section	Amount Paid	Email	Last Modified By	Vehicle type
Buyer number				

Section	First Name	Last Name	
Personal Details	Sample Text	Sample Text	
	Sample Text	Sample Text	
	1-415-555-1212		
	sarah.sample@company.com	Sample Text	
Customer name			
Phone Number			
Email			
Gas Station name			

Section	Fuel filled in vehicle	Vehicle type
Vehicle Info	79.937	Sample Text

Section	Mode of payment	Amount Paid
Receipt details	Sample Text	₹123.45

## 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:**

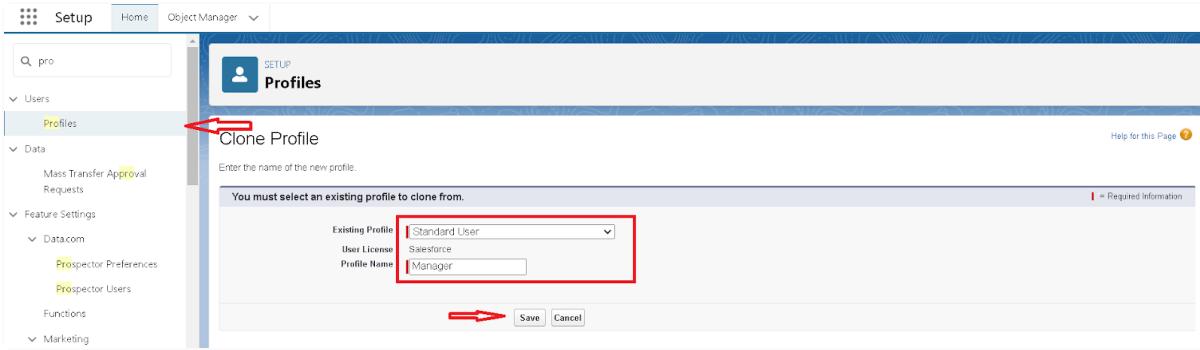
Custom ones defined by us.

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

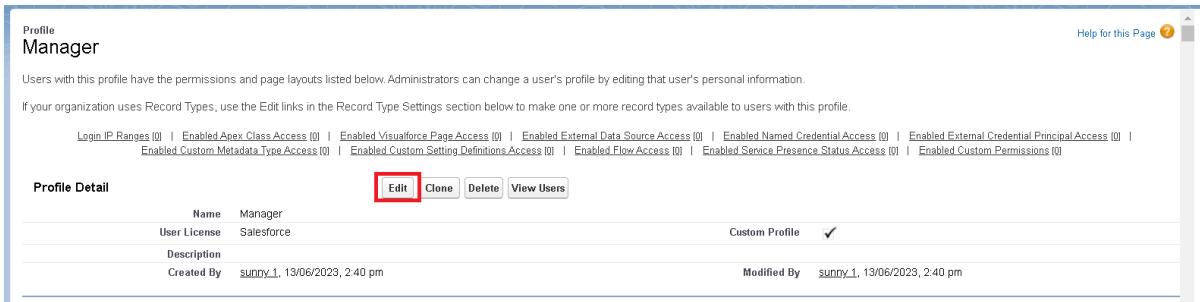
### 7.1 Manager Profile

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.



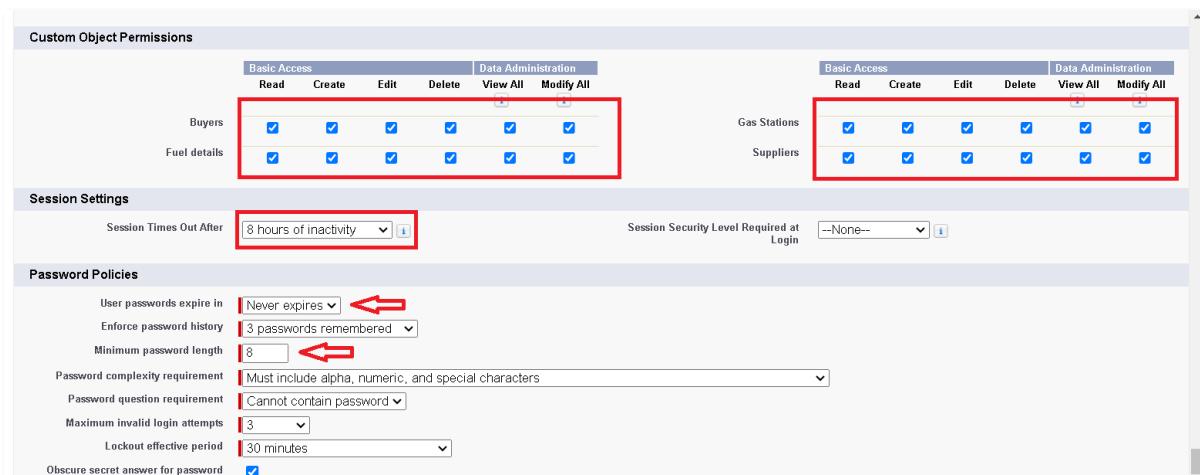
2. While still on the profile page, then click Edit.



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.

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

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.

Custom Object Permissions											
	Basic Access						Data Administration				
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All
Buyers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Fuel details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" 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 checked="" 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 ? Search for Roles ? 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 and a 'Roles' link under the 'Users' category, both highlighted with red boxes. The main content area is titled 'Understanding Roles' and contains a 'Sample Role Hierarchy'. It shows a hierarchy from 'Executive Staff' down to 'Western Sales Director', 'Eastern Sales Director', and 'International Sales Director', with further levels of sales reps. A tooltip for the 'International Sales Director' node provides details about the permissions assigned to this role. At the bottom right of the main content area is a 'Set Up Roles' button.

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. The header has a 'Collapse All' and 'Expand All' link, with 'Expand All' highlighted by a red box. The main content is a hierarchical tree of roles. Under 'Nick Enterprises', there are branches for 'CEO', 'HR', 'Manager', 'On Site Emp', and 'Remote Emp'. Each branch has 'Edit | Del | Assign' and 'Add Role' links. The 'Add Role' link for the 'Manager' node is specifically highlighted with a red box.

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

Role Edit

Label	Manger	
Role Name	Manger	
This role reports to	CEO	
Role Name as displayed on reports		
<input type="button" value="Save"/> <input type="button" value="Save &amp; New"/> <input type="button" value="Cancel"/>		

## 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.

[Collapse All](#) [Expand All](#)

- Thesmartbridge
  - + Add Role
    - CEO [Edit](#) | [Del](#) | [Assign](#)
    - + Add Role
    - CFO [Edit](#) | [Del](#) | [Assign](#)
      - + Add Role
    - COO [Edit](#) | [Del](#) | [Assign](#)
      - + Add Role
    - Manger [Edit](#) | [Del](#) | [Assign](#)
      - + Add Role
    - SVP, Customer Service & Support [Edit](#) | [Del](#) | [Assign](#)
      - + Add Role
    - SVP, Human Resources [Edit](#) | [Del](#) | [Assign](#)
      - + Add Role
    - SVP, Sales & Marketing [Edit](#) | [Del](#) | [Assign](#)
      - + Add Role

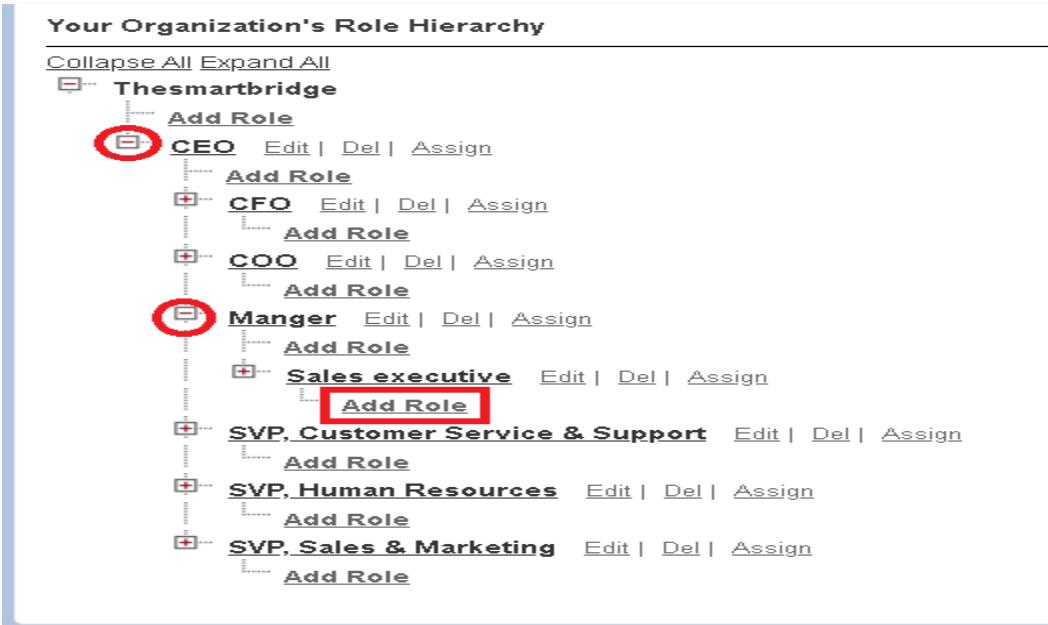
3. Give Label as "sales executive" and Role name gets auto populated. Then click on Save.

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		
<input type="button" value="Save"/> <input type="button" value="Save &amp; New"/> <input type="button" value="Cancel"/>		

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	<input type="text" value="Sales person"/>
Role Name	<input type="text" value="Sales_person"/> 
This role reports to	<input type="text" value="Sales executive"/> 
Role Name as displayed on reports	<input type="text"/>
 <a href="#">Save</a> <a href="#">Save &amp; New</a> <a href="#">Cancel</a>	

# 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

New User

User Edit

Save Save & New Cancel

General Information

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

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--

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

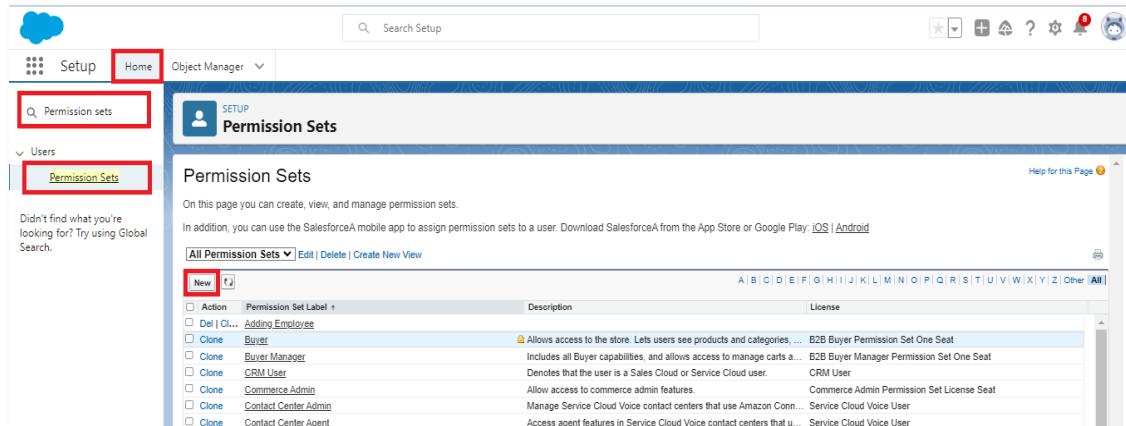
# 10.Permission sets

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

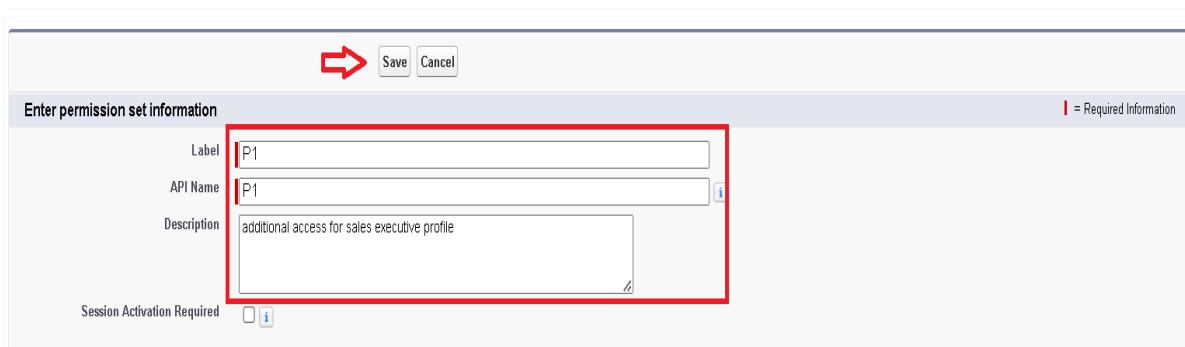
A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission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

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



The screenshot shows the Salesforce Setup interface. The top navigation bar has 'Setup' and 'Home' buttons, with 'Home' being the active tab. A search bar says 'Search Setup'. Below it, a sidebar shows 'Q. Permission sets' and 'Users' with 'Permission Sets' selected. The main content area is titled 'Permission Sets' and contains a table of existing permission sets like 'Buyer', 'Buyer Manager', etc. At the bottom left of the table is a 'New' button, which is highlighted with a red box.

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



The screenshot shows a modal dialog titled 'Enter permission set information'. It has fields for 'Label' (containing 'P1'), 'API Name' (containing 'P1'), 'Description' (containing 'additional access for sales executive profile'), and 'Session Activation Required' (with an unchecked checkbox). A red arrow points to the 'Save' button at the top right of the dialog.

3. Under Apps Select object settings.

**Apps**

<b>Assigned Apps</b> Settings that specify which apps are visible in the app menu
<b>Assigned Connected Apps</b> Settings that specify which connected apps are visible in the app menu
<b>Object Settings</b> Permissions to access objects and fields, and settings such as tab availability
<b>App Permissions</b> Permissions to perform app-specific actions, such as "Manage Call Centers"
<b>Apex Class Access</b> Permissions to execute Apex classes
<b>Visualforce Page Access</b> Permissions to execute Visualforce pages
<b>External Data Source Access</b> Permissions to authenticate against external data sources
<b>Flow Access</b> Permissions to execute Flows
<b>Named Credential Access</b> Permissions to authenticate against named credentials
<b>Custom Permissions</b> Permissions to access custom processes and apps
<b>Custom Metadata Types</b> Permissions to access custom metadata types
<b>Custom Setting Definitions</b> Permissions to access custom settings

- Click on Fuel details object ? click on Edit ? 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"/>

**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"/>

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

**Current Assignments**

Add Assignment

**All Users**

1 item selected

Full Name	Alias	Username	Role	Active	Profile
<input checked="" type="checkbox"/> abd c	ac	ab@cd1.com	Sales executive	<input checked="" type="checkbox"/>	sales executive
<input type="checkbox"/> Astro Nomical	anomi	astronomicalsecurity.2vhahccacdajuzh67mibr0rqsab1dhzd@smart.com	<input type="checkbox"/>	<input type="checkbox"/>	Force.com - Free User
<input type="checkbox"/> Brochan Pane	bpane	bpane.kh061622.nvopq5ltd9yi.cwkqyhudbsb@smart.com	<input type="checkbox"/>	<input type="checkbox"/>	Break Glass Administrator
<input type="checkbox"/> Chatter Expert	Chatter	chatty.00d5i00000dpzofead.nb26j1owcvnq@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Cirrus Cash Flow	cirr	cirrus@cashflow.com	<input type="checkbox"/>	<input type="checkbox"/>	System Administrator

Cancel Next

Select an Expiration Option For Assigned Users

No expiration date ?

Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
-----------	------	---------	--------	--------------	------------

Cancel Back Assign

- 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.

The screenshot shows the 'Sharing Settings' page in the Salesforce setup. The left sidebar has a 'Sharing' section with links like 'Sharing Rule Access', 'Report', and 'Sharing Settings'. A red arrow points to the 'Sharing Settings' link. The main area is titled 'Sharing Settings' and contains a table for 'Default Sharing Settings'. The table has columns for 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. An 'Edit' button is highlighted with a red box. The table rows show settings for Lead, Account and Contract, Contact, Order, and Asset. The 'Grant Access Using Hierarchies' column has checked boxes for all objects except Lead.

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

The screenshot shows the 'Sharing Settings' page with the 'Other Settings' section expanded. Under 'Other Settings', there are dropdown menus for 'Work Plan Template', 'Work Step Template', 'Work Type', 'Work Type Group', 'Gas Station', and 'Supplier'. The 'Gas Station' and 'Supplier' dropdowns are highlighted with red boxes. At the bottom of the page, there are several checkboxes: 'Standard Report Visibility' (checked), 'Manual User Record Sharing' (unchecked), 'Manager Groups' (unchecked), 'Secure guest user record access' (unchecked), and 'Require permission to view record names in lookup fields' (unchecked). The 'Save' button is highlighted with a red box.

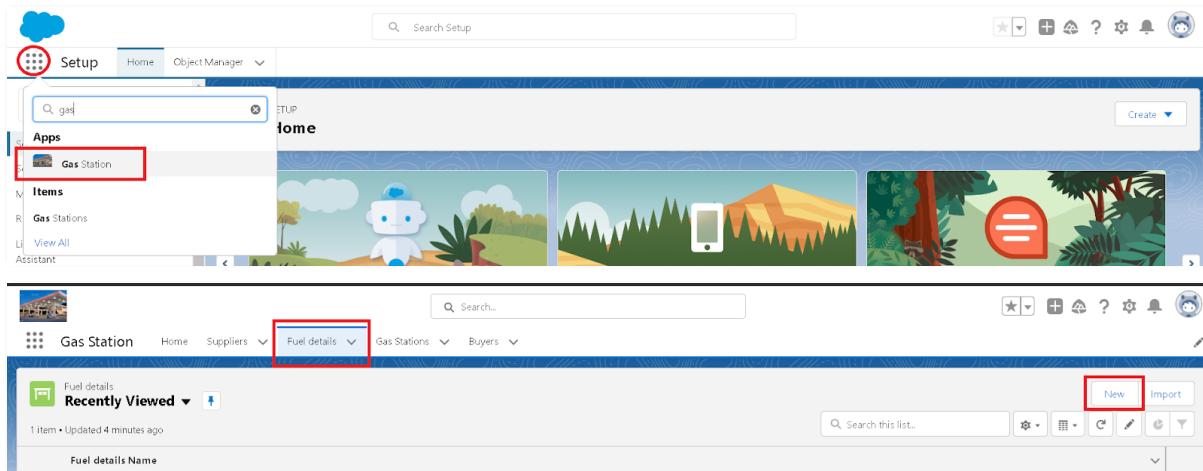
3. Click save.
4. Extra information, By these every profile has their own access, according to their profile.
5. But in our case we created a roles and given the roles in such a way that manager can see sales executive and sales person records , sales executive can see the sales person records.

## 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 ".

New Fuel details

\* = Required Information

Information

Fuel details Name

\*Supplier name

Search Suppliers...

Recent Suppliers

Indian Oil

+ New Supplier

Gas Station

Search Gas Stations...

Cancel Save & New Save

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

New Supplier

Information

\* supplier Name: HP

Owner: sunny 1

Cancel Save & New **Save**

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

\* Gas Station

Search Gas Stations...

Recent Gas Stations

Gas-001

+ New Gas Station **New & New** **Save**

New Gas Station

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

New Gas Station

Information

Gas Station Name: 116

Owner: sunny 1

Cancel Save & New **Save**

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

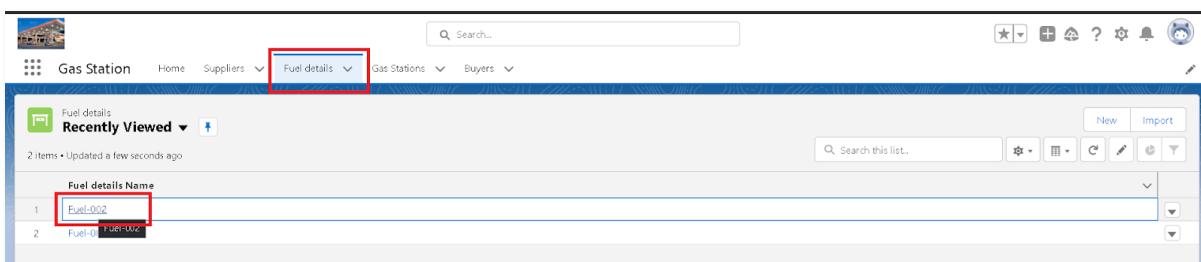
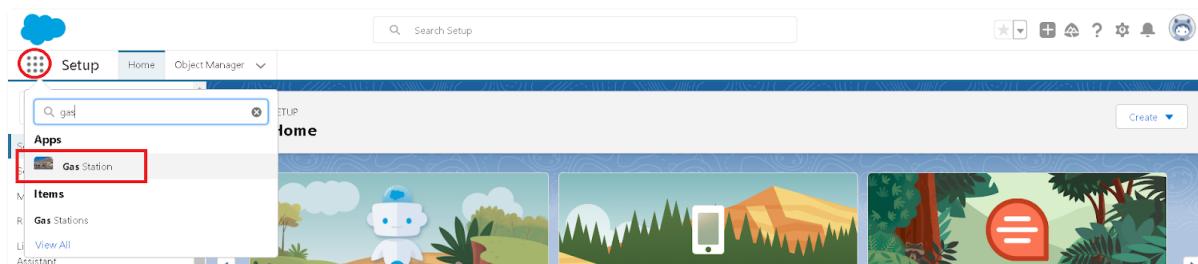
Related	Details
Fuel details Name	Fuel-002
Supplier name	<a href="#">HP</a>
Fuel supplied	80,000
Gas Station	<a href="#">Gas-002</a>

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.



Related **Details**

Fuel details Name  
Fuel-002

Supplier name  
[HP](#)

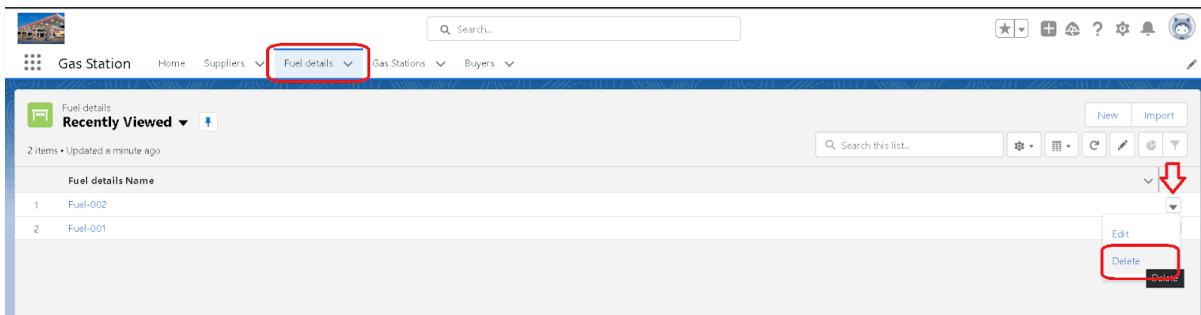
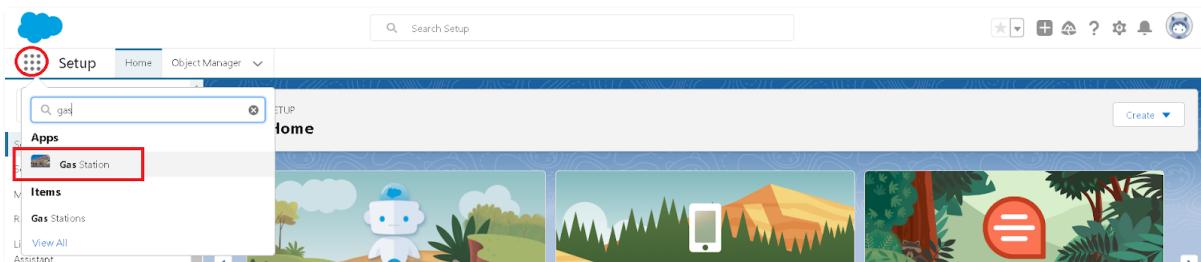
Fuel supplied  
80,000

Gas Station  
[Gas-002](#)

## 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

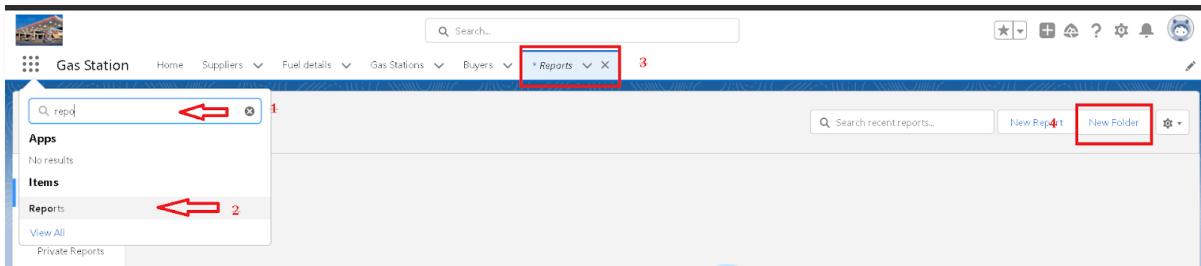
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

## Types of Reports in Salesforce

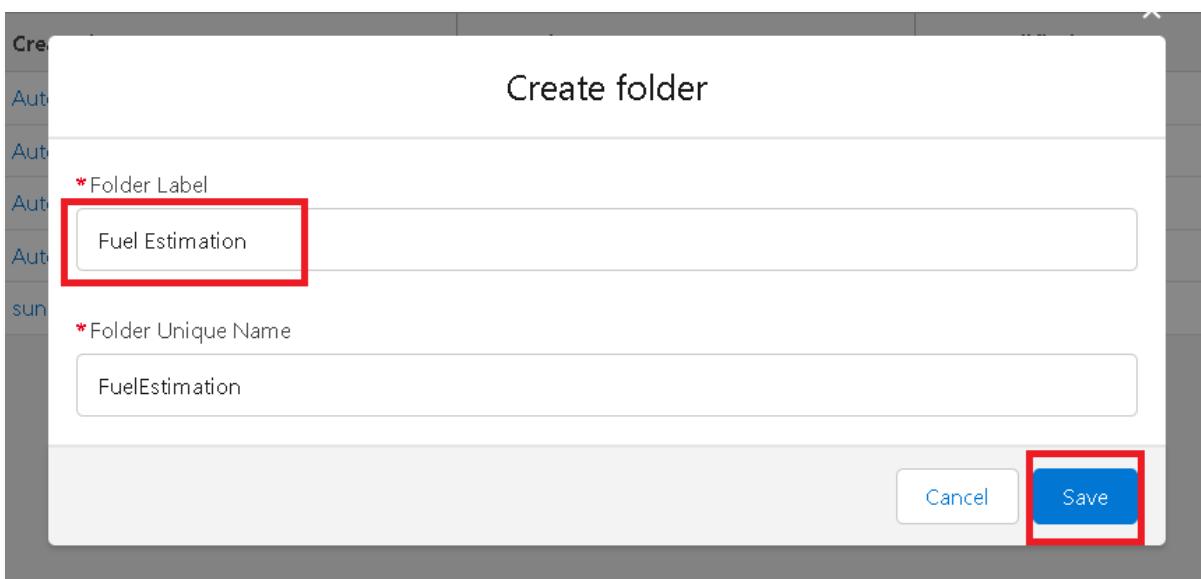
1. Tabular
2. Summary
3. Matrix
4. Joined Reports

### 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.

The screenshot shows the 'Reports' section of the Gas Station app. The top navigation bar includes 'Gas Station', 'Home', 'Suppliers', 'Fuel details', 'Gas Stations', 'Buyers', and a 'Reports' tab which is highlighted with a red box. The sidebar on the left has sections for 'RECENT', 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports'. Under 'FOLDERS', the 'All Folders' link is highlighted with a red box and labeled '2'. The main area displays a table with columns: Name, Created By, Created On, Last Modified By, and Last Modified Date. A row for 'Fuel Estimation' is selected and has a context menu open, also highlighted with a red box and labeled '4'. The context menu options are 'Favorite', 'Share', 'Rename', and 'Delete'.

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.

The screenshot shows the 'Reports' section of the Employee Management app. The top navigation bar includes 'Employee Manage...', 'Home', 'Employees', 'Assets', 'Asset Services', 'Projects', 'ProjectTasks', and a 'Reports' tab which is highlighted with a red box. The sidebar on the left has sections for 'RECENT', 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports'. The main area displays a table with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. Two rows are listed: 'Employee's working on projects report' and 'Assets assigned to Employees'. A red box highlights the 'New Report' button in the top right corner of the table area.

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

Create Report

**Category**

- Recently Used
- All
- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contracts and Orders
- Price Books, Products and Assets

**Select a Report Type**

Report Type Name	Category
Suppliers with Fuel details and Gas Stations	Standard
Gas Stations	Standard
<b>Gas Stations with Buyers</b>	<b>Standard</b>
Gas Stations with Fuel details and Suppliers	Standard
Gas Station History	Standard
Gas Stations with Buyers with Fuel details	Custom

**Details**

**Gas Stations with Buyers**  
Standard Report Type

**Start Report**

**Created By You**  
No Reports Yet

**Created By Others**  
No Reports Yet

**Objects Used in Report Type**

Buyer

4. Their outline pane is opened already, 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

**REPORT** ▾

New Gas Stations with Buyers Report ▾ **Gas Stations with Buyers**

**Fields**

**Groups**

- GROUP ROWS**
- Add group...
- Fuel Available in bunk**

**GROUP COLUMNS**

- Add group...
- Customer name**
- Fuel filled in vehicle**
- # Amount Paid**

**Outline**

Previews a limited number of records. Run the report to see everything.

**Update Preview Automatically**

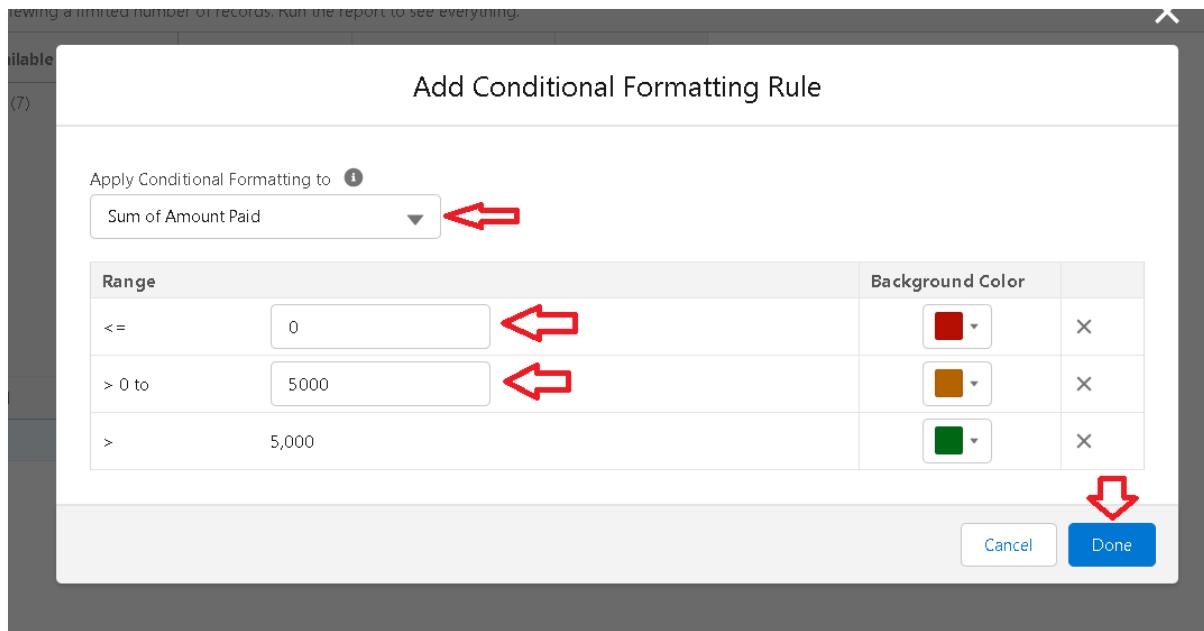
Fuel Available in bunk	Customer name	Fuel filled in vehicle	Amount Paid
2,718.00 (7)	sunny bunny	70	₹6,720.00
	bunny g	15	₹1,440.00
	upadhye shivam	70	₹6,720.00
	sandeep gujja	7	₹672.00
	drug dealer	2,000	₹1,92,000.00
	ssusuke uchiha	50	₹4,800.00
	naruto uzumaki	70	₹6,720.00
		Subtotal	2,282 ₹21,972.00
		Total (7)	2,282 ₹21,972.00

**Columns**

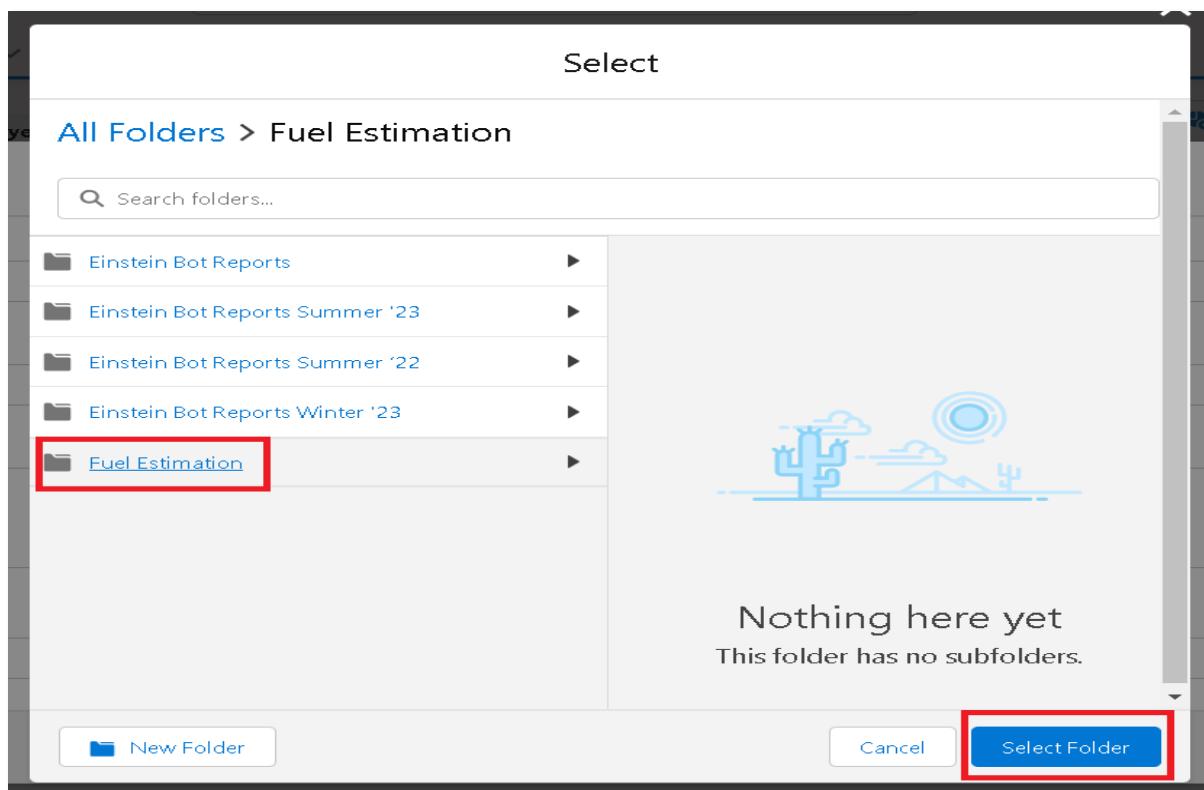
**Row Counts**  **Detail Rows**  **Subtotals**  **Grand Total**

**3**

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 from " 1000 to 5000 ".
11. Don't 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.



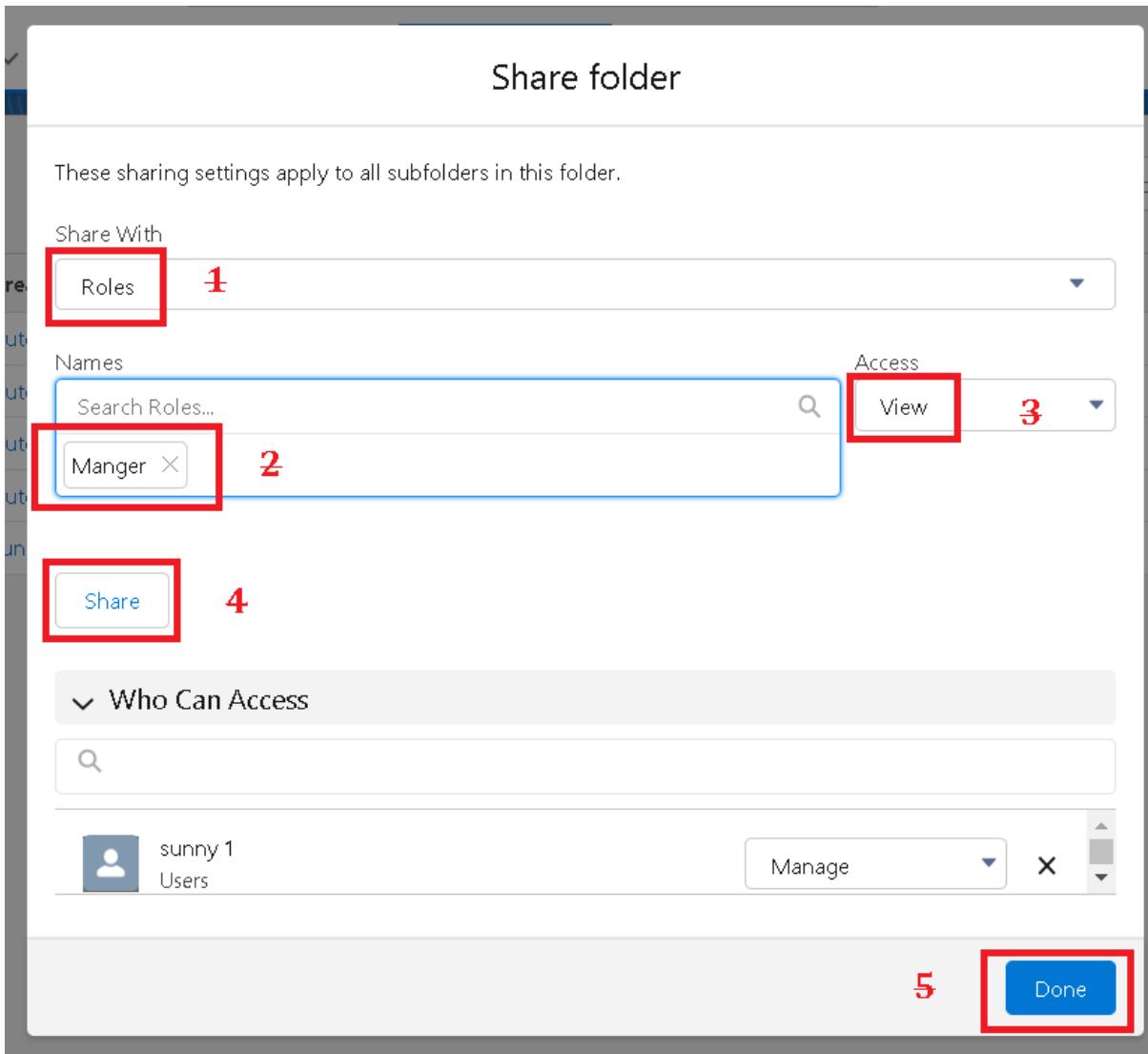
Report: Gas Stations with Buyers

**Amount range**

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

<input type="checkbox"/> Customer name ↑ ↓	Fuel Available in bunk ↑ ↓	Fuel filled in vehicle ↓	Amount Paid ↑ ↓
<input type="checkbox"/> bunny g (1)	2,718.00 (1)	15	₹1,440.00
	<b>Subtotal</b>	15	₹1,440.00
<b>Subtotal</b>		15	₹1,440.00
<input type="checkbox"/> drug dealer (1)	2,718.00 (1)	2,000	₹1,92,000.00
	<b>Subtotal</b>	2,000	₹1,92,000.00
<b>Subtotal</b>		2,000	₹1,92,000.00
<input type="checkbox"/> naruto uzumaki (1)	2,718.00 (1)	70	₹6,720.00
	<b>Subtotal</b>	70	₹6,720.00
<b>Subtotal</b>		70	₹6,720.00
<input type="checkbox"/> sandeep gujja (1)	2,718.00 (1)	7	₹672.00
	<b>Subtotal</b>	7	₹672.00
<b>Subtotal</b>		7	₹672.00
<input type="checkbox"/> sasuke uchiha (1)	2,718.00 (1)	50	₹4,800.00
	<b>Subtotal</b>	50	₹4,800.00

Row Counts Detail Rows Subtotals Grand Total

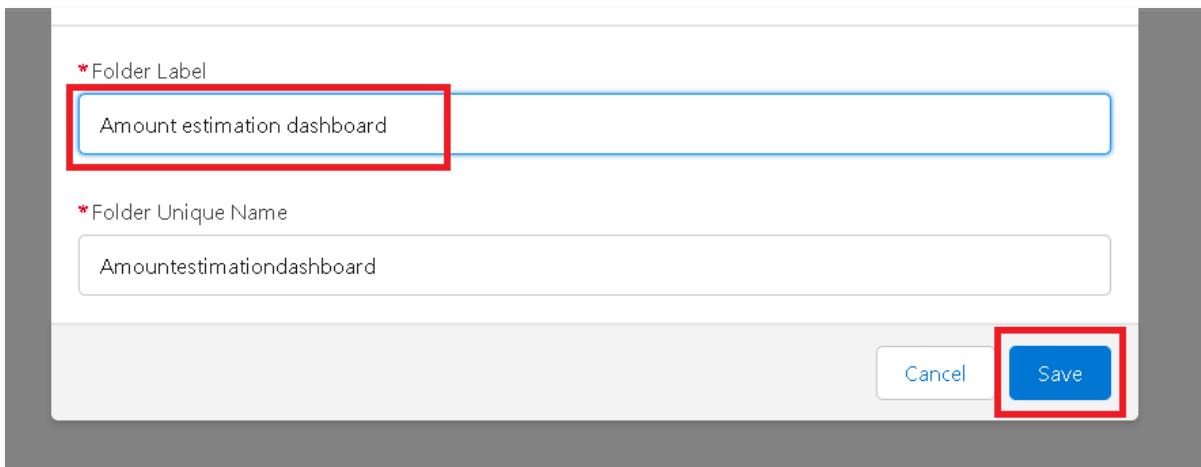


# 14.Dashboards

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

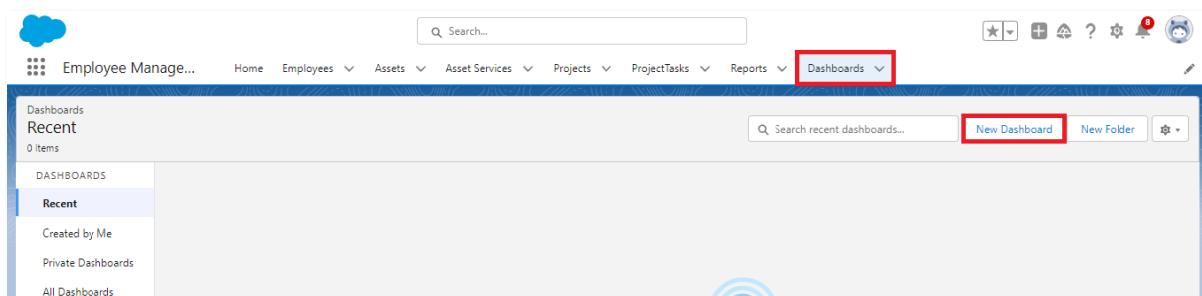
1. Click on the app launcher and search for dashboard.
2. Click on dashboard tab.
3. Click new folder, give the folder label as "Amount estimation dashboard".
4. Folder unique name will be auto populated.
5. Click save.



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 ? click on the Dashboards tabs.



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

New Dashboard

\* Name  
Estimation amount

Description

Folder  
Amount estimation dashboard

Select Folder

Create

3. Select add component.

4. Select a Report and click on select.

Select Report

**Reports**

- Recent
- Created by Me
- Private Reports
- Public Reports
- All Reports

**Folders**

- Created by Me
- Shared with Me

Select Report

Search Reports and Folders...

Amount range  
sumy 1 - 15-Jun-2023, 12:29 pm - Fuel Estimation

Sample Flow Report: Screen Flows  
Automated Process - 16-May-2023, 8:59 am - Public Reports

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

6. Preview is shown below.

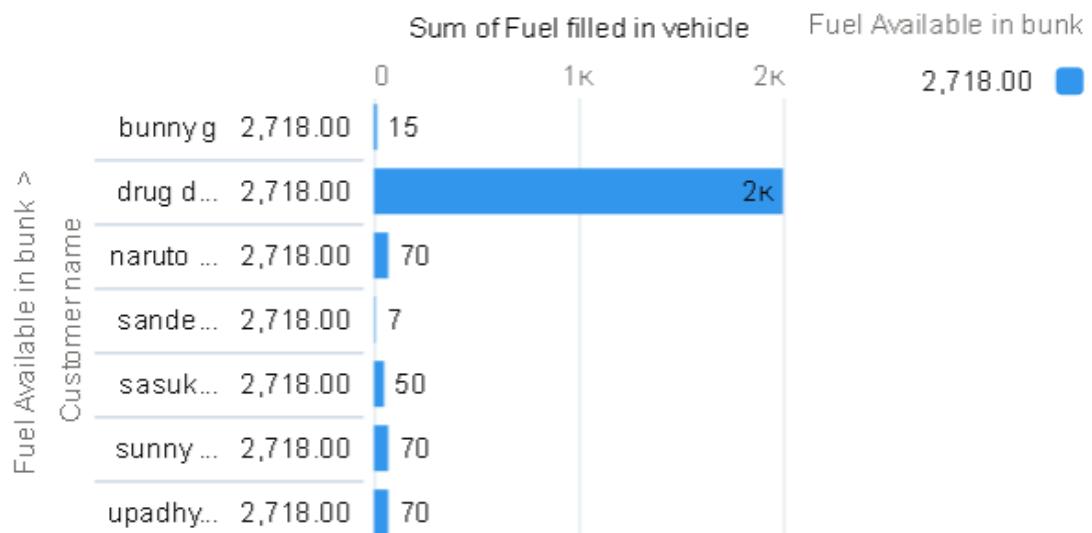


Dashboard

## Estimation amount

As of 15-Jun-2023, 2:50 pm Viewing as sunny 1

### Amount range



[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.

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Process Automation', the 'Flows' item is selected (marked with a red box and number 2). In the main content area, the 'Flows' tab is active, displaying a list of flow definitions. A red box and number 1 highlight the search bar at the top left. A red box and number 3 highlight the 'New Flow' button in the top right corner of the list area.

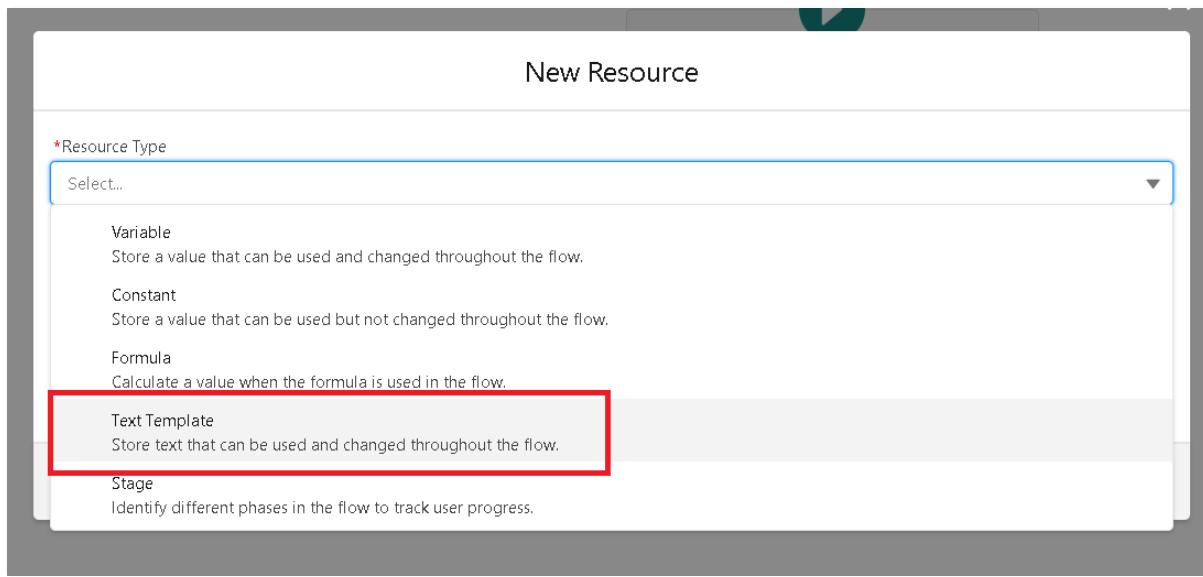
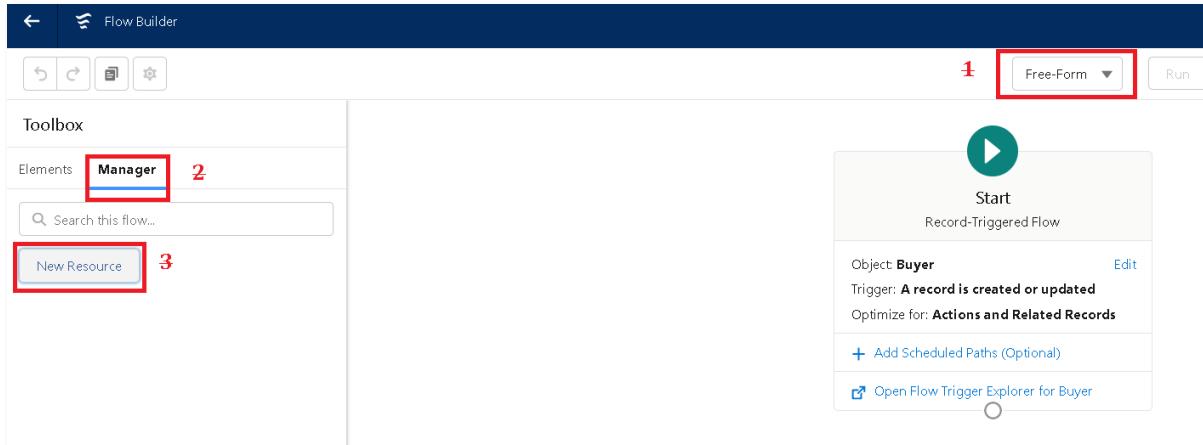
2. Select the Record-triggered flow and Click on Create.

The screenshot shows the 'New Flow' creation page. Under the 'Core' tab, there are several flow types listed:

- Screen Flow (disabled)
- Record-Triggered Flow (selected, highlighted with a red box and number 1)
- Schedule-Triggered Flow (disabled)
- Platform Event—Triggered Flow (disabled)
- Autolaunched Flow (No Trigger) (disabled)
- Record-Triggered Orchestration (disabled)

A red box and number 2 highlights the 'Create' button in the bottom right corner.

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 :**

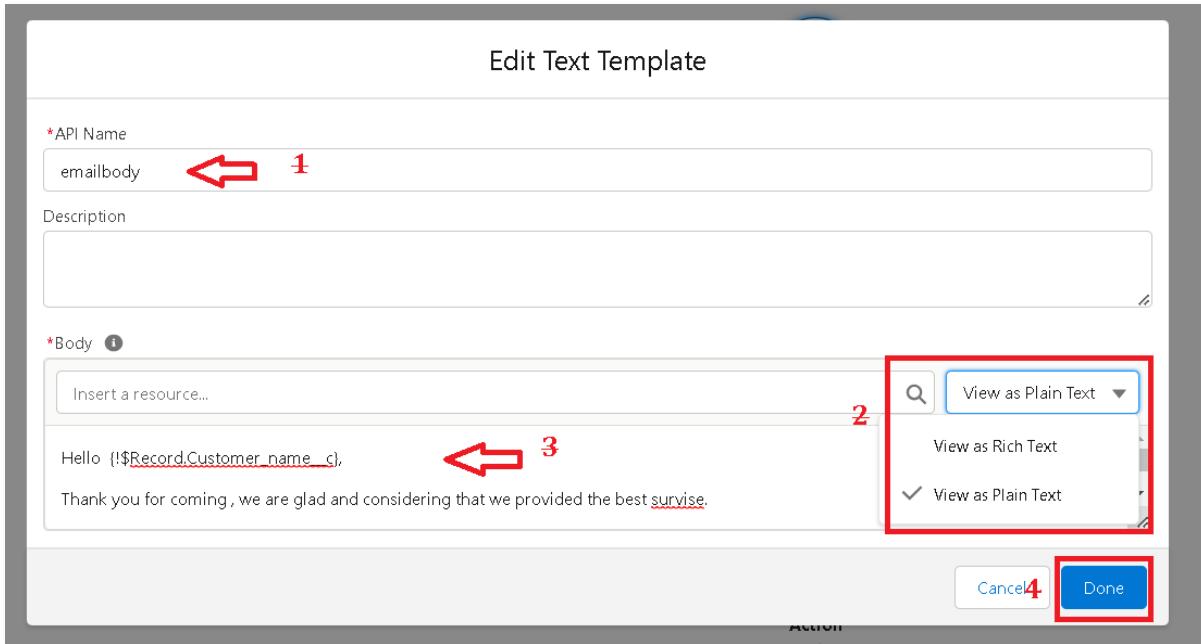
Customer name : {!\$Record.Customer\_name\_\_c}

Amount paid by Customer : {!\$Record.Amount\_Paid\_\_c}

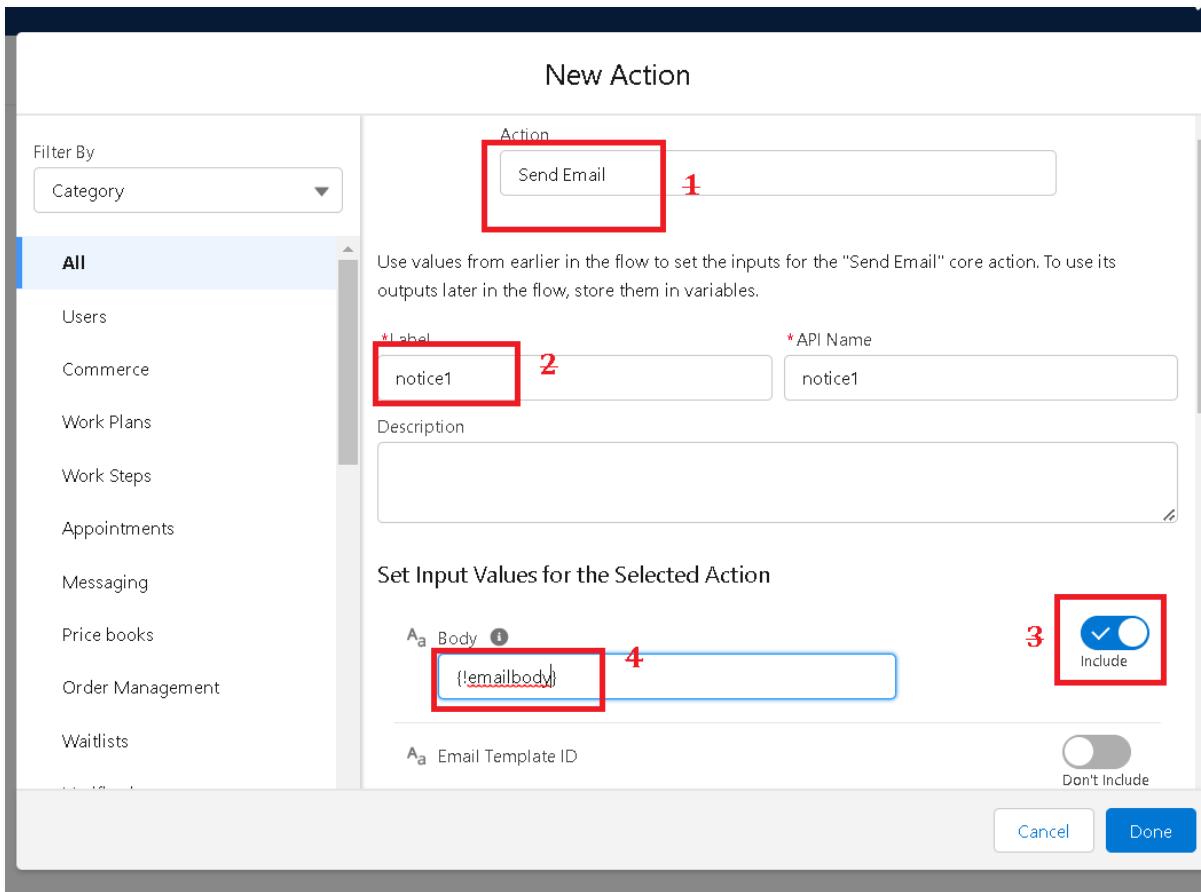
Vehicle type : {!\$Record.Vehicle\_type\_\_c}

Fuel intake in vehicle : {!\$Record.Fuel\_filled\_in\_vehicle\_\_c}

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



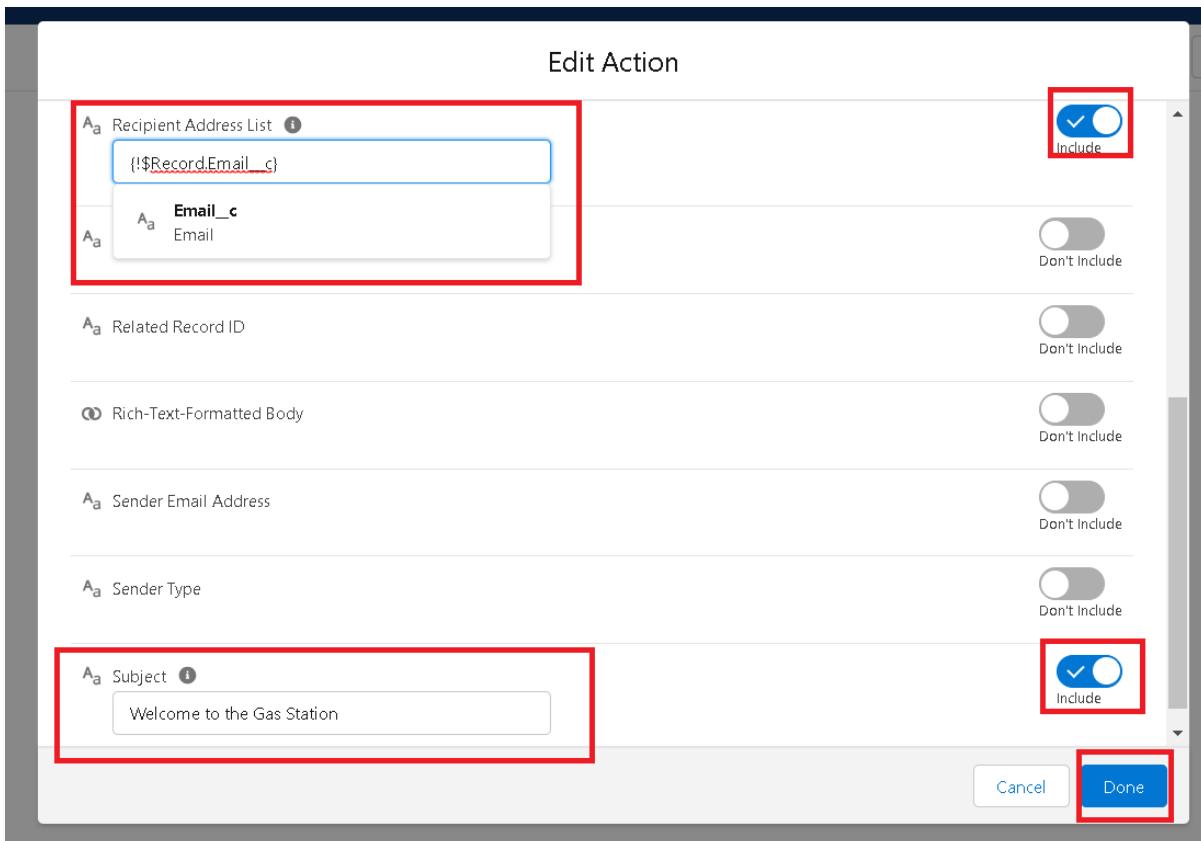
13. Now click on elements, and drag the action element into the preview pane.
14. Their action bar will be opened in that search for “ send email ” and click on it.
15. Give the label name as “ notice ”
16. API name will be auto populated.
17. Enable the body in set input values for the selected action.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

