

# Application to make the Gas filling Station easy using CRM ( admin )

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# Abstract

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

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

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# Creating Developer Account

## Step-1 : Creating a developer org in salesforce

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

The image consists of two main parts. On the left, there is a dark blue background featuring a white computer monitor displaying the Salesforce Platform Builder interface. Overlaid on this are several light blue decorative icons: a gear, a star, a plus sign, and arrows. Below the monitor, the text "Build enterprise-quality apps fast to bring your ideas to life" is displayed in white. To the right of the monitor, a list of features is provided:

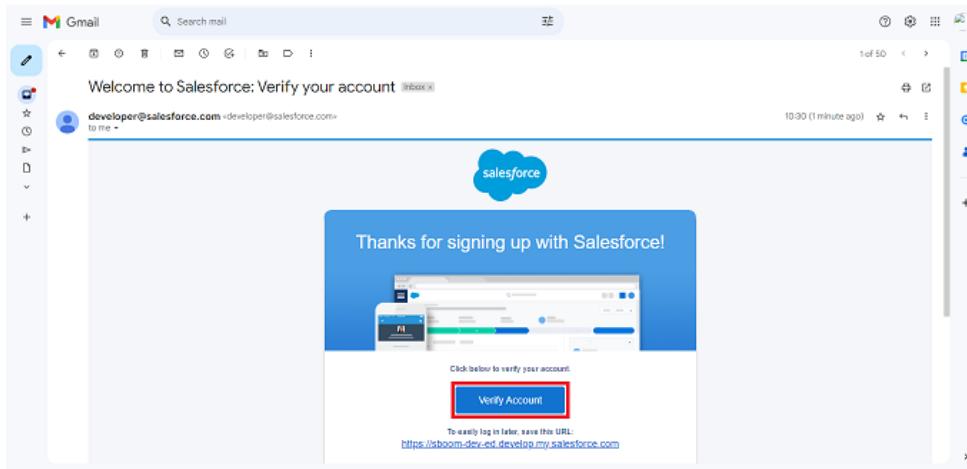
- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

On the right side of the image is the actual "Sign up for your Salesforce Developer Edition" form. It features the Salesforce logo at the top. Below it, the text "Sign up for your Salesforce Developer Edition" and "A full-featured copy of the Platform, for free". A call-to-action button says "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." The form itself contains fields for First Name\*, Last Name\*, Email\*, Role\*, and Company\*. Each field has a placeholder text: "Your first name", "Your last name", "Your email address", "Your job role", and "Company Name".

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

## Step-2 : Account Activation

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



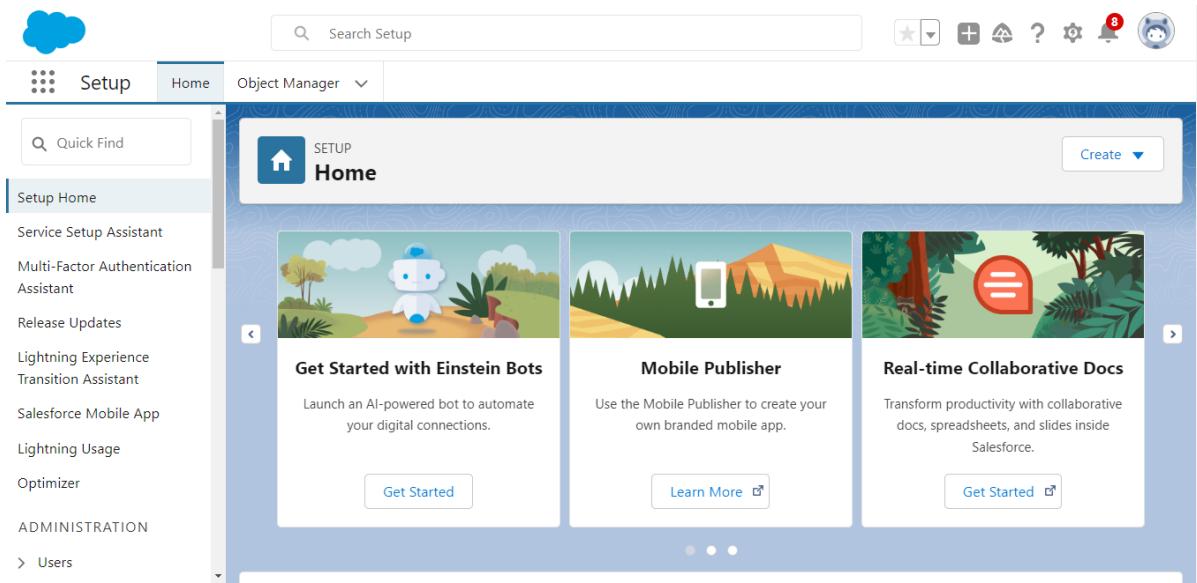
2. Click on verify account.
3. Give a password and answer a security question and click on change password.

A screenshot of the Salesforce "Change Your Password" page. The page title is "Change Your Password". It instructs the user to enter a new password for "lead@sb.oom" and to make sure it includes at least 8 characters, 1 letter, and 1 number. A red box highlights the "New Password" field, which contains "....." and is labeled "Good". Another red box highlights the "Confirm New Password" field, which also contains "....." and is labeled "Match". Below these fields is a "Security Question" section with a dropdown menu showing "In what city were you born?". The "Answer" field below it contains "asdfghjkl". At the bottom is a large blue "Change Password" button, which is also highlighted with a red box.

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

### Step 3: Login to Your Salesforce Account

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



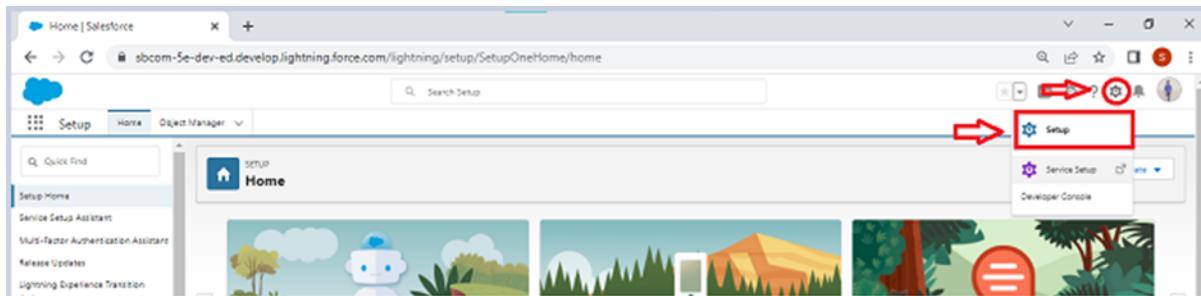
## 2.Object

### What Is an Object?

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

Salesforce objects are of two types:

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



### 2.1 Create Supplier Object

To create an object:

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

## 2.2 Create Gas Station Object

To create an object:

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

## 2.3 Create Buyer and Fuel details Objects

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

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

## 3.Tabs

**What is Tab :** A tab is like a user interface that is used to build records for objects and to view the records in the objects.

### Types of Tabs:

#### 1. Custom Tabs :

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

#### 2. Web Tabs :

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

#### 3. Visualforce Tabs :

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

#### 4. Lightning Component Tabs :

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

#### 5. Lightning Page Tabs :

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

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

## 3.1 Creating a Custom Tab

### To create a Tab:(supplier)

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

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

- A red box highlights the "Setup" button in the top navigation bar.
- A red box highlights the "Tabs" link in the top navigation bar.
- A red box highlights the search bar containing "Tabs".
- A red box highlights the "New" button in the "Custom Object Tabs" section of the list.

The "Custom Object Tabs" list includes the following entries:

Action	Object	Label	Tab Style	Description
Edit	Activities	Activities	Desk	Created to setup with student activity(junction object)
Edit	Attachments	Attachments	Appliance	
Edit	Categories	Categories	Chess piece	
Edit	Custom23	Custom23	Journal	This tab is related to Hotel Reservation App
Edit	Deals	Deals	Appliance	
Edit	Events	Events	Phone	This tab is related to College Management System
Edit	Files	Files	Camera	
Edit	Order Details	Order Details	Desk	
Edit	Quotes	Quotes	Computer	
Edit	Products	Products	Highway Sign	This tab is related to Hotel Reservation App
Edit	Associations	Associations	Highway Sign	This tab is related to Hotel Reservation App
Edit	Risks	Risks	Appliance	
Edit	Locations	Locations	Phone	This tab is related to College Management System

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

The screenshot shows the "Step 1. Enter the Details" configuration page with the following fields and highlights:

- Step 1 of 3** is displayed at the top right.
- Object:** A dropdown menu is open, showing "supplier" selected. Other options include "None", "Buyer", "Gas Station", and "Receipt".
- Tab Style:** A dropdown menu is open, showing "Supplier" selected. Other options include "None".
- (Optional) Choose a Home Page Custom Link:** A dropdown menu is open, showing "Supplier" selected. Other options include "None".
- Description:** A text input field is empty.
- Next >** and **Cancel** buttons are at the bottom right.

**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"/>

**Analytics Studio (standard\_\_Insights)**

**Sales Console (standard\_\_LightningSalesConsole)**

**Service Console (standard\_\_LightningService)**

**Sales (standard\_\_LightningSales)**

**Lightning Usage App (standard\_\_LightningInstrumentation)**

**Digital Experiences (standard\_\_SalesforceCMS)**

**Queue Management (standard\_\_QueueManagement)**

**Bolt Solutions (standard\_\_LightningBolt)**

**Data Manager (standard\_\_DataManager)**

**Salesforce Scheduler Setup (standard\_\_LightningScheduler)**

Append tab to users' existing personal customizations

**Previous** **Save** **Cancel**

## 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

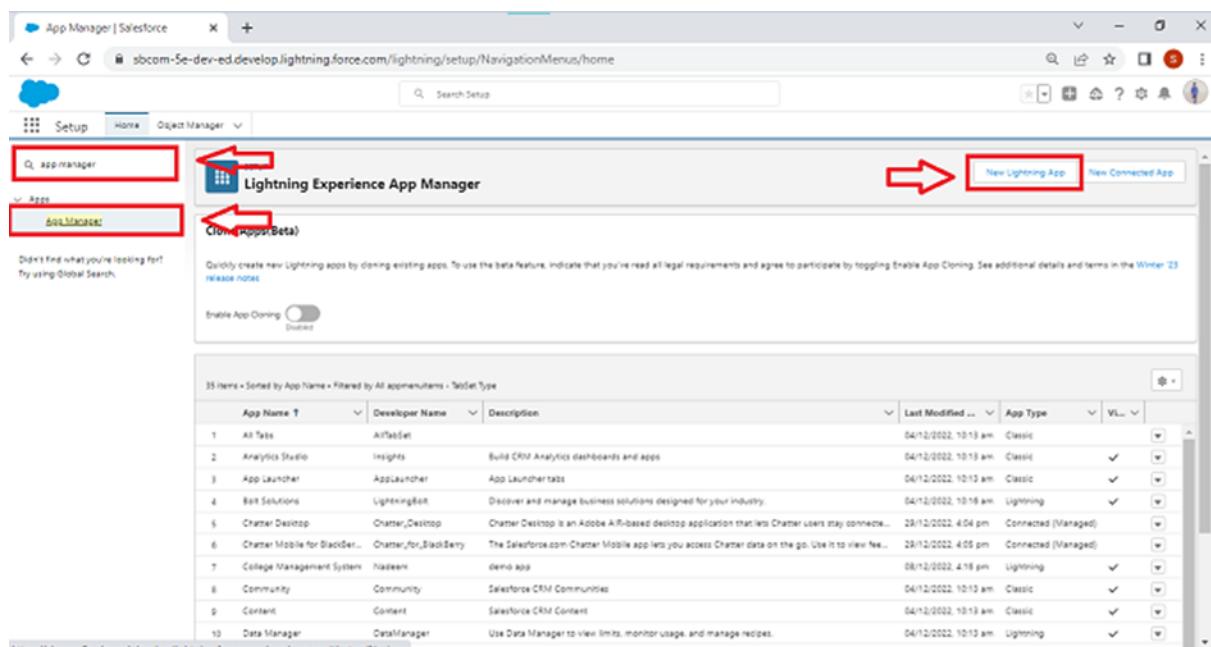
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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 then search “app manager” in quick find then select “app manager” then click on New lightning App.

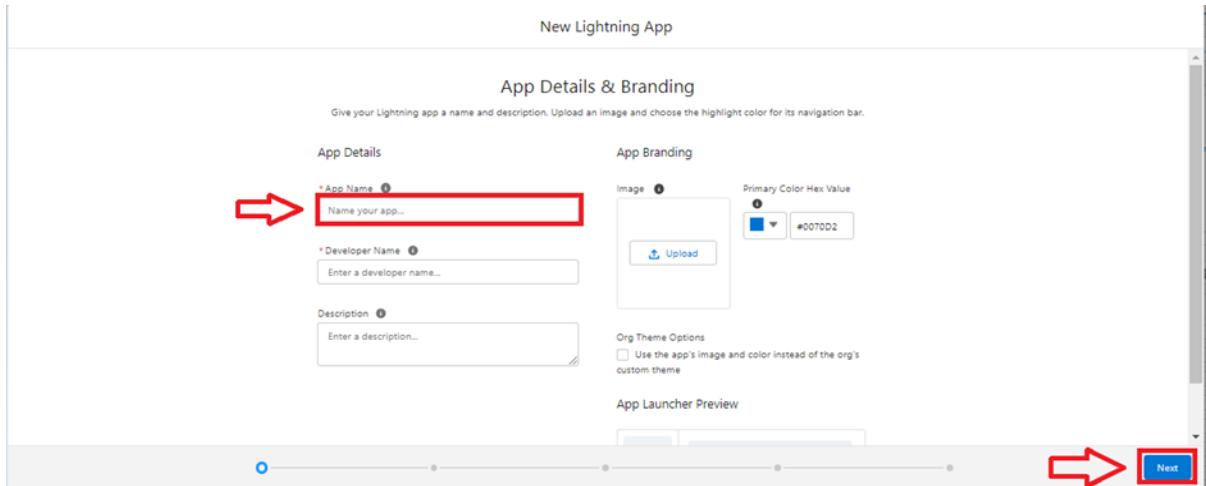


The screenshot shows the Salesforce App Manager interface. At the top, there's a search bar and a 'New Connected App' button. Below it, there are sections for 'App Manager' and 'Cloud Apps (Beta)'. A red arrow points to the 'Cloud Apps (Beta)' section. Another red arrow points to the 'New Lightning App' button at the top right of the main content area. The bottom part of the screen shows a list of existing apps, including 'All Tabs', 'Analytics Studio', 'App Launcher', 'Bolt Solutions', 'Charter Desktop', 'Charter Mobile for BlackBerry', 'College Management System', 'Community', 'Content', and 'Data Manager'. Each entry includes columns for App Name, Developer Name, Description, Last Modified, App Type, and Version.

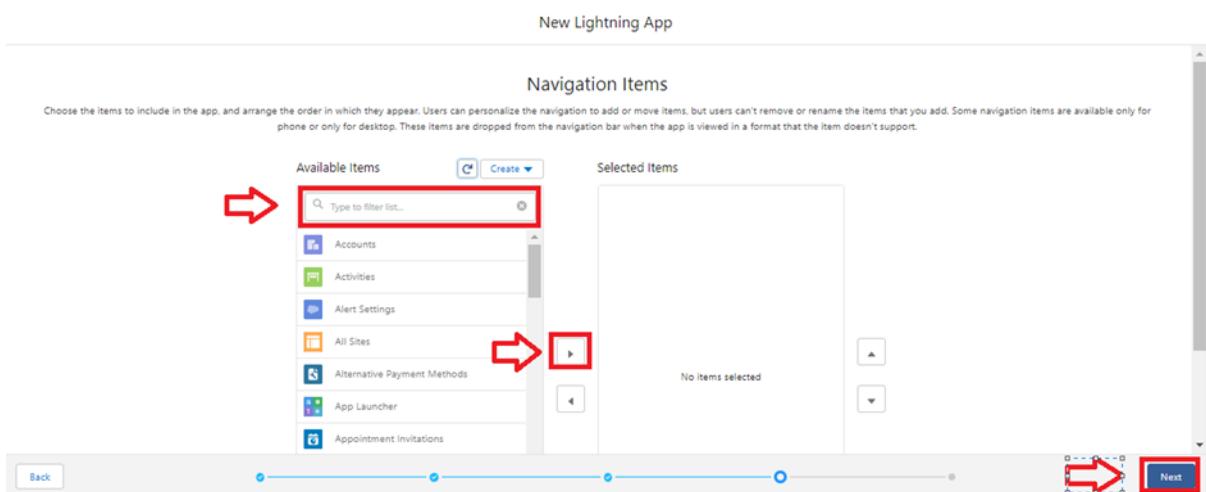
App Name	Developer Name	Description	Last Modified	App Type	Ver.
All Tabs	Artisan	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	
App Launcher	AppLauncher	App Launcher tab	04/12/2022, 10:13 am	Classic	
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry	04/12/2022, 10:18 am	Lightning	
Charter Desktop	Charter/Desktop	Charter Desktop is an Adobe AIR-based desktop application that lets Charter users stay connected...	29/12/2022, 4:04 pm	Connected (Managed)	
Charter Mobile for BlackBerry	Charter/for BlackBerry	The Salesforce.com Charter Mobile app lets you access Charter data on the go. Use it to view fe...	29/12/2022, 4:05 pm	Connected (Managed)	
College Management System	Naresh	demo app	08/12/2022, 4:18 pm	Lightning	
Community	Community	Salesforce CRM Communities	04/12/2022, 10:13 am	Classic	
Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic	
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	04/12/2022, 10:13 am	Lightning	

2. Fill the app name in app details as GAS STATION then Next then (App option

page) keep it as default then Next then (Utility Items) keep it as default then Next.

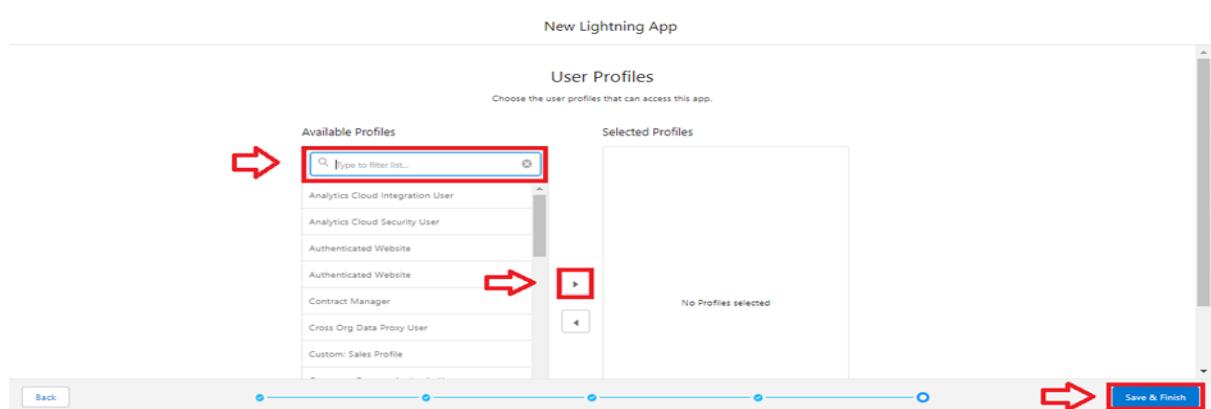


### 3. To Add Navigation Items:



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

### 4. To Add User Profiles:



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

## 5.Fields

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

### Types of Fields

1. Standard Fields
2. Custom Fields

#### **Standard Fields:**

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

?Created By

?Owner

?Last Modified

?Field Made During object Creation

#### **Custom Fields:**

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

### 5.1 Creating Junction Object

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

## Creating junction object as Fuel details with Supplier & Gas station

To create junction object

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

The screenshot shows the Salesforce Object Manager. A red box highlights the 'Object Manager' button in the top navigation bar. Another red box highlights the 'Create' button in the top right corner. A third red box highlights the 'Fuel' label in the list of objects. The list shows two items: 'Student' (Custom Object, College Management System) and 'Student Activity' (Custom Object, created for the purpose of junction object). The 'Fuel' object is being created.

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

The screenshot shows the 'Fields & Relationships' section for the 'Supplier' object. A red box highlights the 'Fields & Relationships' tab in the sidebar. Another red box highlights the 'New' button at the top right of the list. The list displays five fields: 'Created By', 'Last Modified By', 'Owner', 'Sum of Fuel supplied', and 'supplier Name'. The 'Sum of Fuel supplied' field is a roll-up summary field.

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

The screenshot shows the 'Data Type' selection screen. A red box highlights the 'Master-Detail Relationship' option. The 'None Selected' option is also shown. The 'Auto Number', 'Formula', and 'Roll-Up Summary' options are described as system-generated sequence numbers, read-only formula fields, and roll-up summary fields respectively. The 'Lookup Relationship' option is described as linking to another object via a relationship field. The 'External Lookup Relationship' option is described as linking to an external object.

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

Buyer  
New Relationship

Step 2. Choose the related object

Select the other object to which this object is related

Related To: Supplier

Step 2 of 6

Previous Next Cancel

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

6. Next then Next then Save & New.

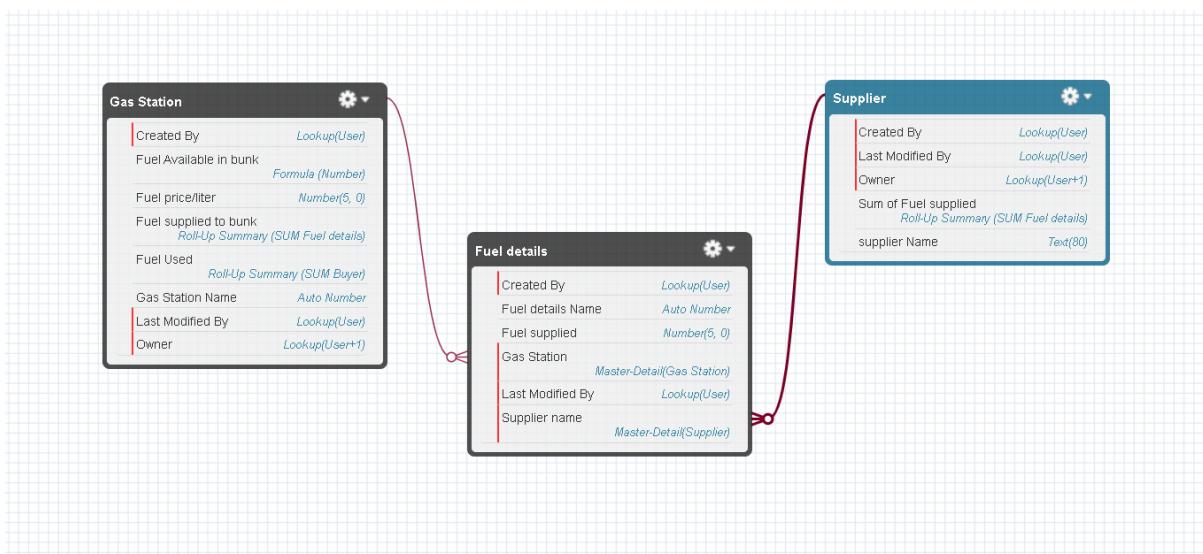
7. Follow the same steps from 1 to 3.

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

9. Give Field Label as “Gas Station” and click Next.

10. Next then Next then Save.

11. Below their is an overview of junction object for better understanding.



## 5.2 Creating a Master-Detail Relationship

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

### Creating Master-Detail Relationship between Buyer & Gas Station Object

To Create a Master-Detail relationship

1. Go to the setup page then click on object manager then From drop down click

edit for Buyer object.

2. Click on fields & relationship then click on New.
3. Select “**Master-Detail relationship**” as data type and click Next.
4. Select the related object “ **Gas station** ”.
5. Give Field Label as “**Gas Station name**” and click Next.
6. Next then Next then Save.

## 5.3 Creating the number field in Fuel details object

Creating the number field in Fuel details object

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

Step 2. Enter the details Step 2 of 4

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 then Next then Save.

## 5.4 Creating the Roll-up Summary

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

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

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

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

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

Specify the type of information that the custom field will contain.

**Data Type**

None Selected

Select one of the data types below.

Auto Number

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship

Creates a special type of parent-child relationship between this object (the child, or “detail”) and another object (the parent, or “master”) where:

- The relationship field is required on all detail records

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

Step 2. Enter the details

Step 2 of 5

Previous Next Cancel

Field Label

Field Name

Description

Help Text

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

Previous Next Cancel

## 5. Select the summarized object as “Fuel details”.

## 6. Select the Rollup type as “sum”.

7. Select the field to aggregate as “ **Fuel supplied** ”, and click Next then Next then Save.

Step 3. Define the summary calculation

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

Step 3 of 5

Previous Next Cancel

= 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 then Next then 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 then Next then Save.

## 5.5 Creating Formula Field in Gas Station Object

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

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

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

- Automating processes

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

**Step 2. Choose output type**

Step 2 of 5

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: `(CloseDate - 1) * 24 * 60 * 60`

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]`

**Next** **Cancel**

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**

`Fuel Available in bunk (Number) =`   
`Fuel_supplied_to_bunk_c - Fuel_Used_c`

**Functions**

All Function Categories  
 ABS  
 ACOS  
 ADDMONTHS  
 AND  
 ASCII  
 ASIN

**Insert Selected Function**

## 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 then click on Object Manager then type object name(Buyer) in search bar then click on the object.
9. Click on fields & relationship then click on New.
10. Select Data type as “**Formula**” and click Next.
11. Give Field Label and Field Name as “**Customer Name**” and select formula return type as “**TEXT**” and click next.

12. Insert field formula should be : First\_Name\_\_c + '' + Last\_Name\_\_c

13. click "Check Syntax" and Save.

## 5.6 Creating Cross Object Formula Field in Buyer Object

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

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

Step 2. Choose output type Step 2 of 5

Field Label [redacted] Field Name [redacted] Previous 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: `[Next = 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.

The screenshot shows the Formula Editor window. At the top, it says "Formula Return Type: Currency" and "Decimal Places: 2". Below that is a text input field containing the formula: "Fuel\_filled\_in\_vehicle\_\_c \* Gas\_Station\_name\_\_r.Fuel\_price\_liter\_\_c". To the right of the input field is a dropdown menu titled "Insert Operator" and a scrollable list of functions titled "Functions". The functions listed include ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, and many others. A red box highlights the formula input field.

## 5.7 Creating Picklist Field in Buyer Object

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

The screenshot shows the "Step 2. Enter the details" screen. It has a header "Step 2 of 4" and buttons "Previous", "Next", and "Cancel". The main area has sections for "Field Label" (set to "Vehicle type"), "Values" (radio button selected for "Enter values, with each value separated by a new line"), and a text area containing the values: "Two Wheeler", "Three Wheeler", "Four Wheeler", "Six Wheeler", "Eight Wheeler", and "Others". There are also checkboxes for "Display values alphabetically, not in the order entered", "Use first value as default value", and "Restrict picklist to the values defined in the value set" (which is checked). A red box highlights the "Values" section and the list of vehicle types.

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

## 5.8 Creating the validation rule

### Creating the validation rule for phone number field in Buyer object

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

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

The screenshot shows the 'Validation Rules' section of the 'Buyer' object's setup. The left sidebar lists various configuration tabs like Buttons, Links, and Actions, Field Sets, Object Limits, Record Types, etc. The 'Validation Rules' tab is selected. The main area displays a table with one item: 'phone' (Rule Name), 'Phone Number' (Error Location), 'incorrect data' (Error Message), and 'Active' (Status). A red arrow points to the 'New' button at the top right of the table header, and another red arrow points to the 'Validation Rules' tab in the sidebar.

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}")).

The screenshot shows the 'Validation Rule Edit' dialog for the 'phone' rule. It includes fields for Rule Name (set to 'phone'), Active status (checked), and a Description field. The 'Error Condition Formula' field contains the expression 'NOT(REGEX( Phone\_Number\_\_c , "[6-9]{1}[0-9]{9}"))'. A red box highlights this formula. To the right, there's a 'Functions' dropdown menu showing options like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, with 'ABS(number)' selected. A 'Quick Tips' panel is visible on the right. At the bottom left, a 'Check Syntax' button is highlighted with a red box, showing the message '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   

This error message can either appear at the top of the page or below a specific field on the page

Error Location  Field  Top of Page  Phone Number    

➡ Save Save & New Cancel

## 6. Page layouts

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

### 6.1 creating the page layout

#### To Create a Page layout:

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

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Customer Layout	sunny 1, 08/06/2023, 3:05 pm	sunny 1, 12/06/2023, 4:00 pm

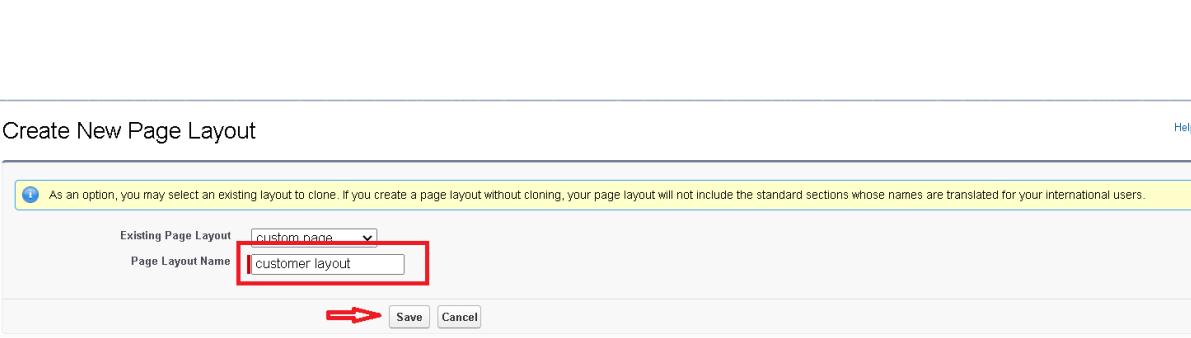
3. Select the existing page layout, and give the page layout name as "customer layout", and click save.

Create New Page Layout

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.

Existing Page Layout: custom page  
Page Layout Name: customer layout

**Save** **Cancel**



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

## 7. Profiles

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

**1. Standard profiles:**

By default salesforce provides below standard profiles.

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

The screenshot shows the Salesforce Setup interface under the Profiles section. A modal window titled 'Clone Profile' is open. It prompts for a new profile name ('Enter the name of the new profile') and requires selecting an existing profile to clone from ('You must select an existing profile to clone from'). The 'Existing Profile' dropdown is set to 'Standard User', and the 'Profile Name' input field contains 'Manager'. The 'User License' dropdown is set to 'Salesforce'. At the bottom of the modal are 'Save' and 'Cancel' buttons, with 'Save' highlighted by a red arrow.

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

The screenshot shows the 'Profile Manager' detail page. At the top, there's a summary of permissions and record types. Below is a table with columns for Name (Manager), User License (Salesforce), Description, Created By (sunny\_1, 13/06/2023, 2:40 pm), and Modified By (sunny\_1, 13/06/2023, 2:40 pm). At the bottom of the page, there's a 'Profile Detail' section with an 'Edit' button highlighted by a red box. Another red arrow points to the 'Edit' button in this section.

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

The screenshot shows the 'Custom App Settings' page. It lists several apps with columns for Visible (checkbox) and Default (radio button). The 'Gas Station (Gas\_Station)' row has its 'Default' radio button selected and highlighted by a red arrow.

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

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.

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.

The screenshot shows the 'Layout Properties' screen for a custom object profile. At the top, there's a toolbar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. A 'Fields' sidebar on the left lists various actions like 'Buttons', 'Quick Actions', 'Mobile & Lightning Actions', etc. The main area displays a table of fields under sections like 'Personal Details', 'Vehicle Info', and 'Receipt details'. A red box highlights the 'Personal Details' section, which includes fields for First Name, Last Name, Customer name, Phone Number, Email, and Gas Station name. Another red box highlights the 'Receipt details' section, which includes Mode of payment and Amount Paid.

## 7.2 sales executive Profile

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

The screenshot shows the 'Custom Object Permissions' screen. It has two main sections: one for 'Buyers' and 'Fuel details' on the left, and another for 'Gas Stations' and 'Suppliers' on the right. Each section has a table with columns for 'Basic Access' (Read, Create, Edit, Delete, View All, Modify All) and 'Data Administration' (Read, Create, Edit, Delete, View All, Modify All). Red boxes highlight the 'Read' and 'Edit' checkboxes for 'Buyers', 'Fuel details', 'Gas Stations', and 'Suppliers' in the first row of each section.

5. And click save.

## 7.3 sales person Profile

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

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

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

5. And click save.

## 8.Role & Role Hierarchy

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

### 8.1 Creating Manager Role

Creating Manager Role:

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

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar labeled 'roles' and a 'Roles' link under the 'Users' category, both highlighted with red boxes. The main content area is titled 'SETUP Roles'. It features a 'Sample Role Hierarchy' section with a diagram showing a hierarchy from 'Executive Staff' (CEO, President, CFO, VP, Sales) down to 'Western Sales Director' (Director of W. Sales), 'Eastern Sales Director' (Director of E. Sales), and 'International Director' (Director of Int'l Sales). Each role has associated users like 'CA Sales Rep', 'NY Sales Rep', 'MA Sales Rep', 'Asian Sales Rep', and 'European Sales Rep'. Descriptions for each level explain their permissions: 'Executive Staff' can view and edit data, roll up forecasts, and manage reports for all users below them or other Executive Staff; 'Sales Director' can view and edit data, roll up forecasts, and manage reports for all users directly below them; 'Sales Rep' can view and edit data, roll up forecasts, and manage reports only for own data and for others above or at same level. A 'Set Up Roles' button is at the bottom right, and a note says 'Didn't find what you're looking for? Try using Global Search.'

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.

**Role Edit**

Label	Manger	➡
Role Name	Manger	🔍
This role reports to	CEO	🔍
Role Name as displayed on reports		
<span style="color: red;">➡</span> <span>Save</span> <span>Save &amp; New</span> <span>Cancel</span>		

## 8.2 Creating another roles

Creating another two roles under manager

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

[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	<input type="text" value="Sales executive"/> <span style="color: red;">→</span>
Role Name	<input type="text" value="Sales_executive"/> <span style="color: red;">→</span>
This role reports to	<input type="text" value="Manger"/> <span style="color: red;">→</span>
Role Name as displayed on reports	<input type="text"/>
<span style="color: red;">→</span> <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	Sales person
Role Name	Sales_person 
This role reports to	Sales executive 
Role Name as displayed on reports	

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

# 9. Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

## 9.1 Create User

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

New User

User Edit Save Save & New Cancel

General Information

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

Role: Manager  
User License: Salesforce  
Profile: Manager  
Active:

Marketing User:   
Offline User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:   
Data.com User Type:  --None--

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 then type "permission sets" in quick search then select permission sets then New.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup' and 'Home'. The left sidebar has a search bar and categories like 'Users' and 'Permission Sets'. Under 'Permission Sets', there is a note: ' Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Permission Sets' with a sub-section 'Permission Sets'. It contains a table with columns 'Action', 'Permission Set Label', 'Description', and 'License'. The table lists various permission sets such as 'Adding Employee', 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent', and 'Service Cloud Voice User'. A red box highlights the 'New' button at the top left of the table.

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

The screenshot shows a dialog box 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' (unchecked). A red box highlights the 'Label' and 'API Name' fields. An arrow points to the 'Save' button at the top right.

3. Under Apps Select object settings.

The screenshot shows the 'Apps' section of the Salesforce setup. On the left, there is a sidebar with 'Learn More' links for Sales, Lightning Platform, and custom apps. The main content area is titled 'Object Settings' with a sub-section 'Assigned Apps'. Other sections include 'Assigned Connected Apps', 'Object Settings' (which is highlighted with a red box), 'App Permissions', 'Apex Class Access', 'Visualforce Page Access', 'External Data Source Access', 'Flow Access', 'Named Credential Access', 'Custom Permissions', 'Custom Metadata Types', and 'Custom Setting Definitions'.

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

Permission Set  
P1

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

Permission Set Overview > Object Settings | Fuel details

**Fuel details** | Save | Cancel

Tab Settings

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

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"/>

5. Click on Save.
6. After saving the permission click on the Manage assignment
7. 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"/> abdc	ac	ab@cdt.com	Sales executive	<input checked="" type="checkbox"/>	sales executive
<input type="checkbox"/> Astro Nomical	anomi	astronomicalsecurity.2vhahccrda.juzh67mibr0rqs8l1dhz@smart.com	<input type="checkbox"/>	<input type="checkbox"/>	Force.com - Free User
<input type="checkbox"/> Brochan Pane	bpane	bpane.kh061622.nvopq5ltd9yi.cwkqyhdbsxb@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 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**

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 then type “sharing settings ” in quick search then Click edit.

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. In the left sidebar, under 'Security', 'Sharing Rule Access' is selected, and 'Sharing Settings' is highlighted with a red arrow. The main content area displays the 'Sharing Settings' table with columns for 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. An 'Edit' button is highlighted with a red box. A note at the top states: 'This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to Background Jobs to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.'

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 dropdown menus for changing object access levels. The 'Gas Station' and 'Supplier' objects are highlighted with red boxes. The 'Other Settings' section includes checkboxes for 'Standard Report Visibility', 'Manual User Record Sharing', 'Manager Groups', 'Secure guest user record access', and 'Require permission to view record names in lookup fields'. The 'Save' button is highlighted with a red box.

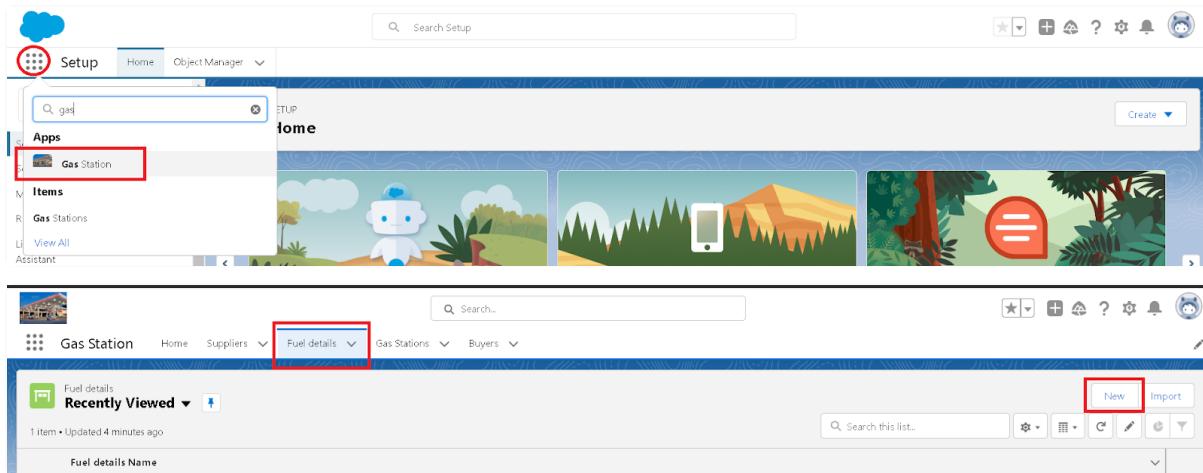
3. Click save.
4. Extra information, By these every profile has their own access, according to their profile.
5. But in our case we created a roles and given the roles in such a way that manager can see sales executive and sales person records , sales executive can see the sales person records.

# 12.User Adoption

## 12.1 create a record

To create a record in junction object follow these steps

1. Click on the app launcher locate at left side of the screen.
2. Search for “ Gas station” and click on it.
3. Click on “ fuel details tab”.
4. Click on new and fill the details as shown below figs, and click save.



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

New Fuel details

\* = Required Information

**Information**

Fuel details Name

\*Supplier name

Search Suppliers... 

Recent Suppliers

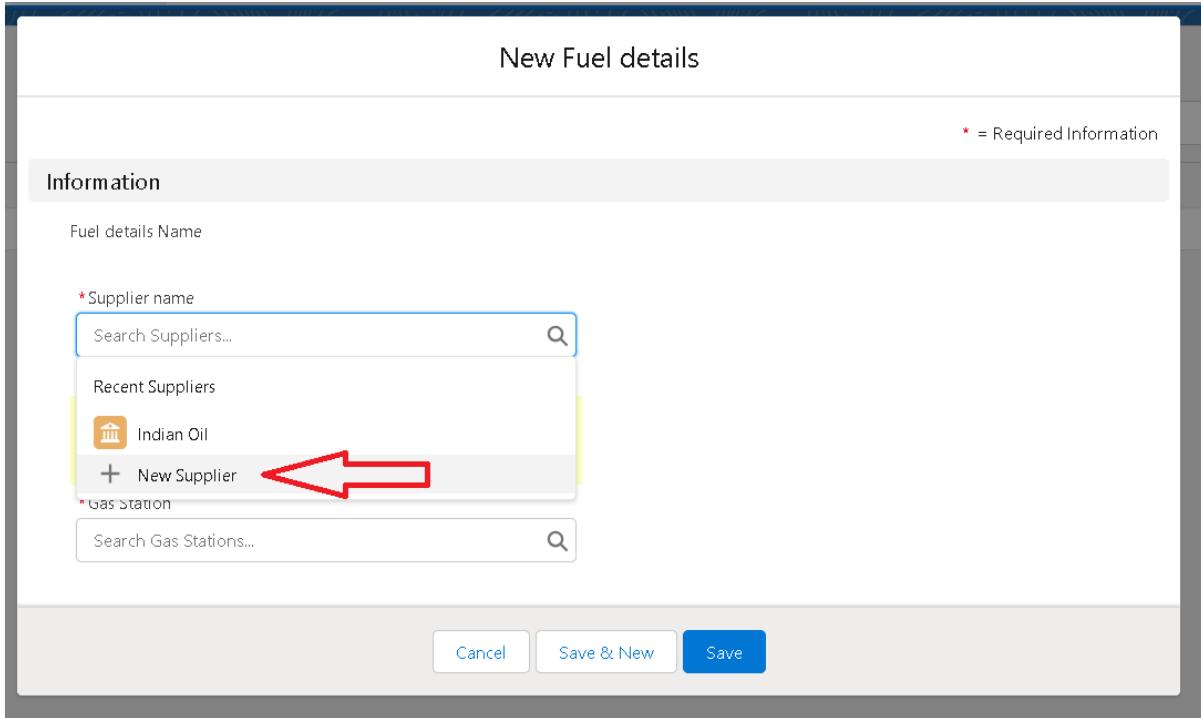
 Indian Oil

+ New Supplier 

\*Gas Station

Search Gas Stations... 

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



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

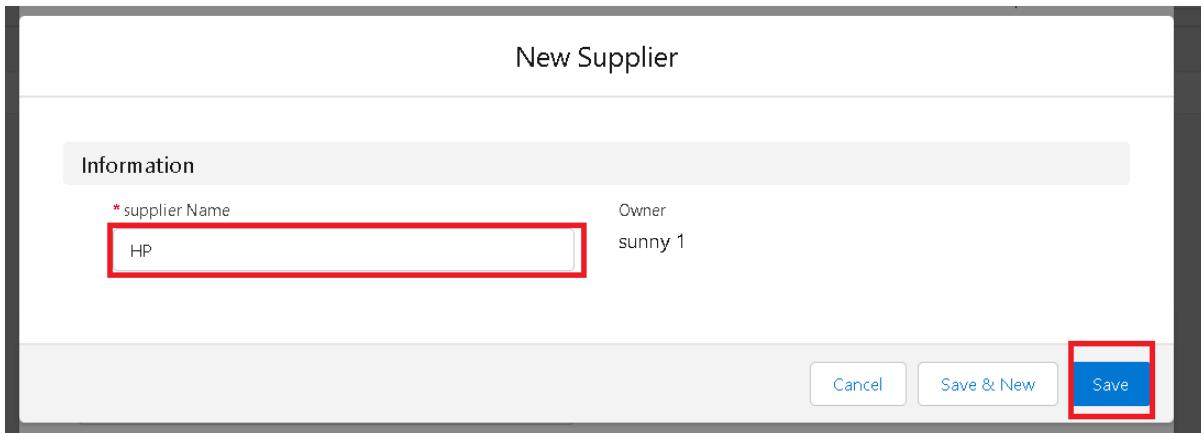
New Supplier

**Information**

\* supplier Name  Owner

HP sunny 1

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



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

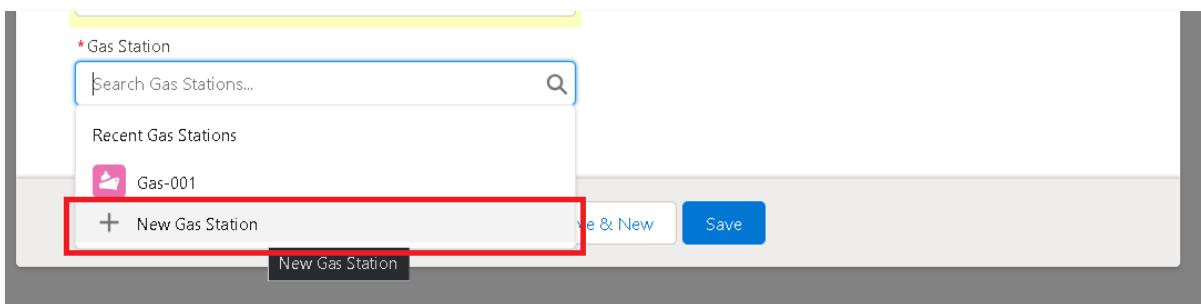
\* Gas Station

Search Gas Stations... 

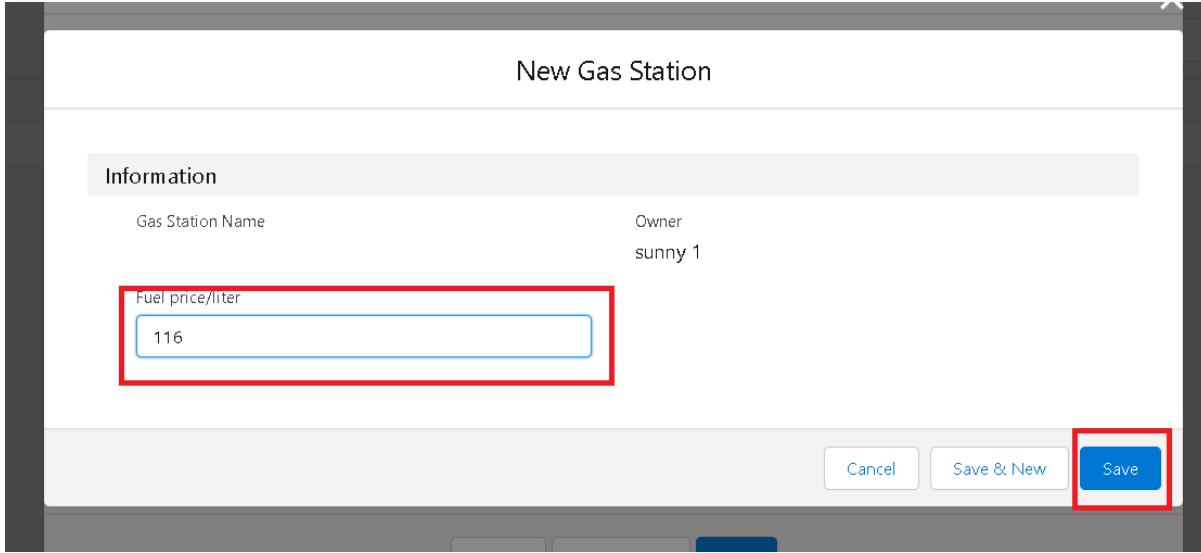
Recent Gas Stations

 Gas-001

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



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



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

Related	Details
Fuel details Name	Fuel-002
Supplier name	HP
Fuel supplied	80,000
Gas Station	Gas-002

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.

The first screenshot shows the Salesforce Setup Home page with a search bar for 'gas' and a 'Create' button. A red box highlights the 'Gas Station' app icon in the Apps section.

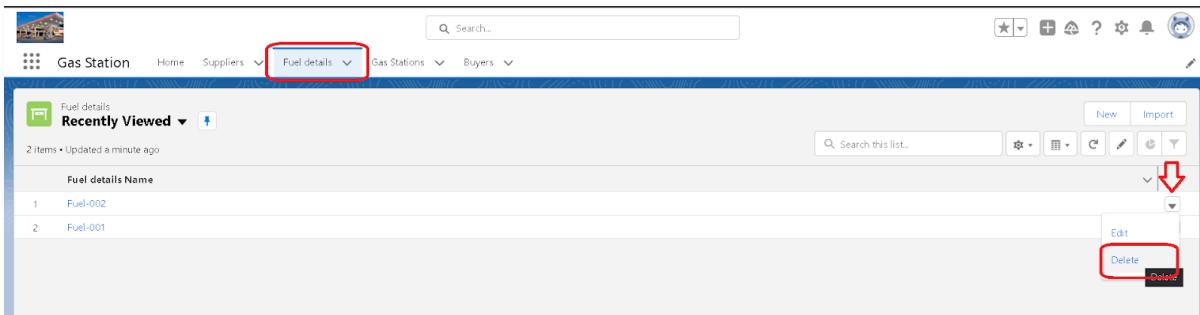
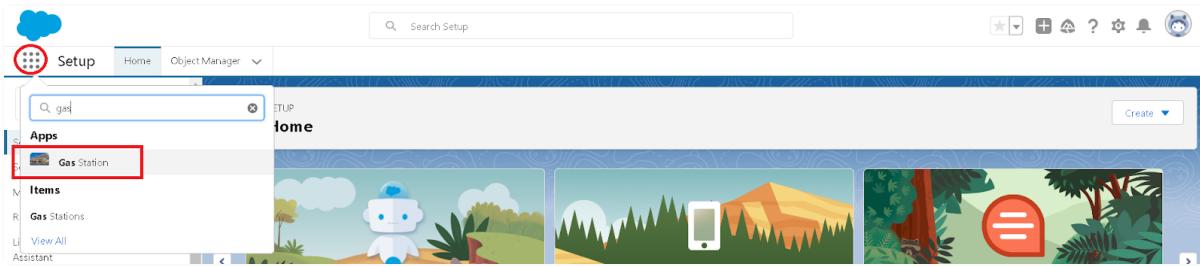
The second screenshot shows the 'Fuel details' tab in the 'Gas Station' object's list view. A red box highlights the 'Fuel details' tab in the top navigation bar. Another red box highlights the 'Fuel-002' record in the list.

The third screenshot shows the detailed view of the 'Fuel-002' record. It displays fields like 'Fuel details Name' (Fuel-002), 'Supplier name' (HP), 'Fuel supplied' (80,000), and 'Gas Station' (Gas-002). A red box highlights the 'Delete' button at the bottom right of the screen.

## 12.2 Delete a record

To create a record in junction object follow these steps

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



## 13. Reports

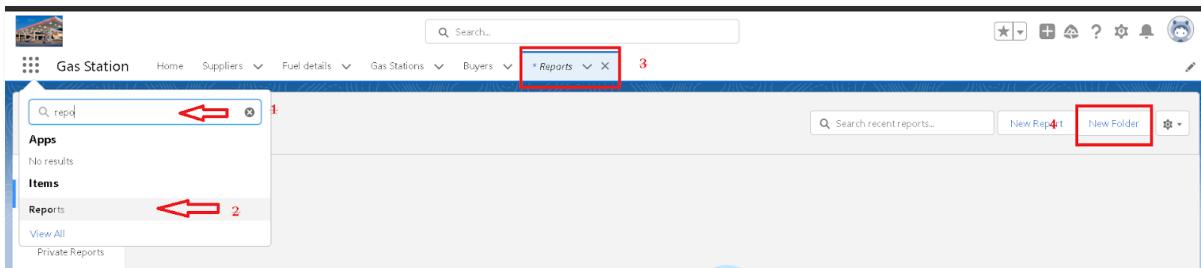
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

### Types of Reports in Salesforce

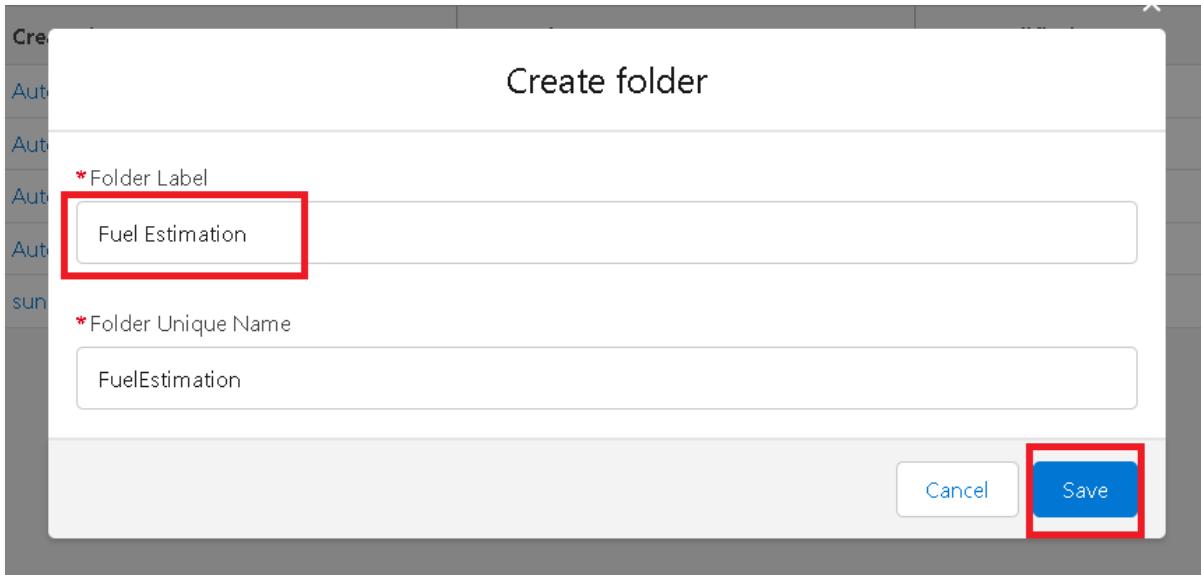
1. Tabular
2. Summary
3. Matrix
4. Joined Reports

#### 13.1 create a report folder

1. Click on the app launcher and search for reports.
2. Double click on the report, “reports tab” will be autopopulated in navigation bar.
3. Click on the report tab, click on new folder.



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



## 13.2 Sharing a report folder

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

The screenshot shows the Gas Station application's reports section. The top navigation bar includes links for Home, Suppliers, Fuel details, Gas Stations, Buyers, and Reports. The Reports tab is currently selected, indicated by a red box. The main area displays a table of reports with columns for Name, Created By, Created On, Last Modified By, and Last Modified Date. A context menu is open over one of the reports, with the 'Share' option highlighted by a red box. The sidebar on the left shows categories like Reports, Folders, and Favorites, with 'All Folders' selected and highlighted by a red box.

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 then click on the reports tab
2. Click New Report.

The screenshot shows the Employee Management application's reports section. The top navigation bar includes links for Home, Employees, Assets, Asset Services, Projects, ProjectTasks, Reports, and Dashboards. The Reports tab is currently selected, indicated by a red box. The main area displays a table of recent reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. A 'New Report' button is located in the top right corner of the main area, highlighted by a red box. The sidebar on the left shows categories like Reports, Folders, and Favorites, with 'Reports' selected and highlighted by a red box.

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
- Administrative Documents

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>	Standard
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](#)

① Details
Fields (32)

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

REPORT ▾
Gas Stations with Buyers
Run

Fields
Filters

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

Update Preview Automatically

Groups

GROUP ROWS

Add group...

Fuel Available in bunk  2

GROUP COLUMNS

Add group...

Columns

Add column...  4

Customer name

# Fuel filled in vehicle

# Amount Paid

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
	sasuke uchiha	50	₹4,800.00
	naruto uzumaki	70	₹6,720.00
	<b>Subtotal</b>		₹2,282
	<b>Total (7)</b>		₹2,19,072.00

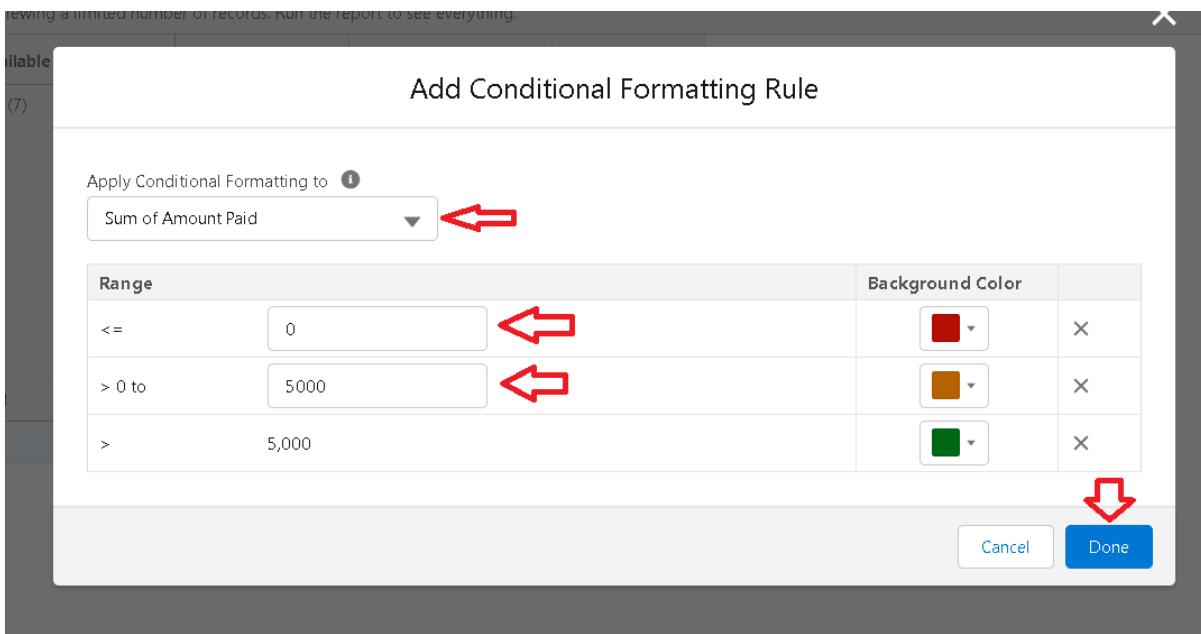
Row Counts 
Detail Rows 
Subtotals 
Grand Total

3 Conditional Formatting

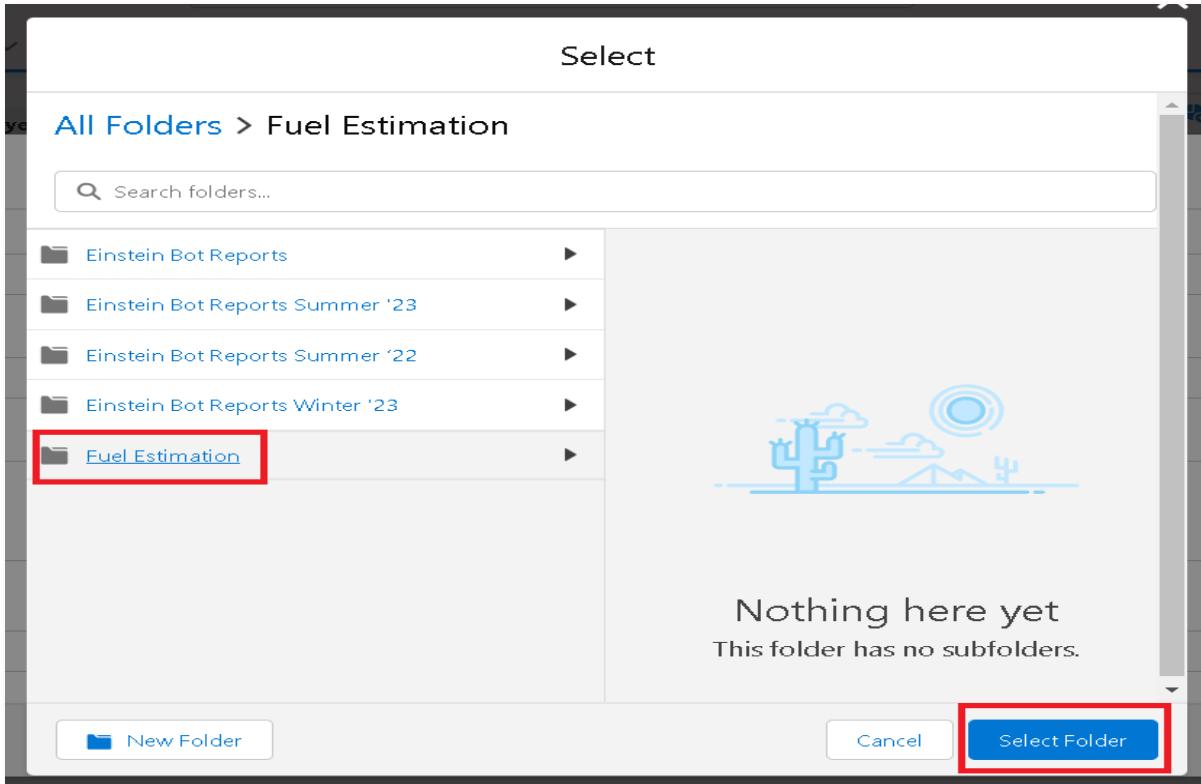
7. Click on conditional formatting located at the bottom of the preview pane.
8. Click on add conditional formatting rule.



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

<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

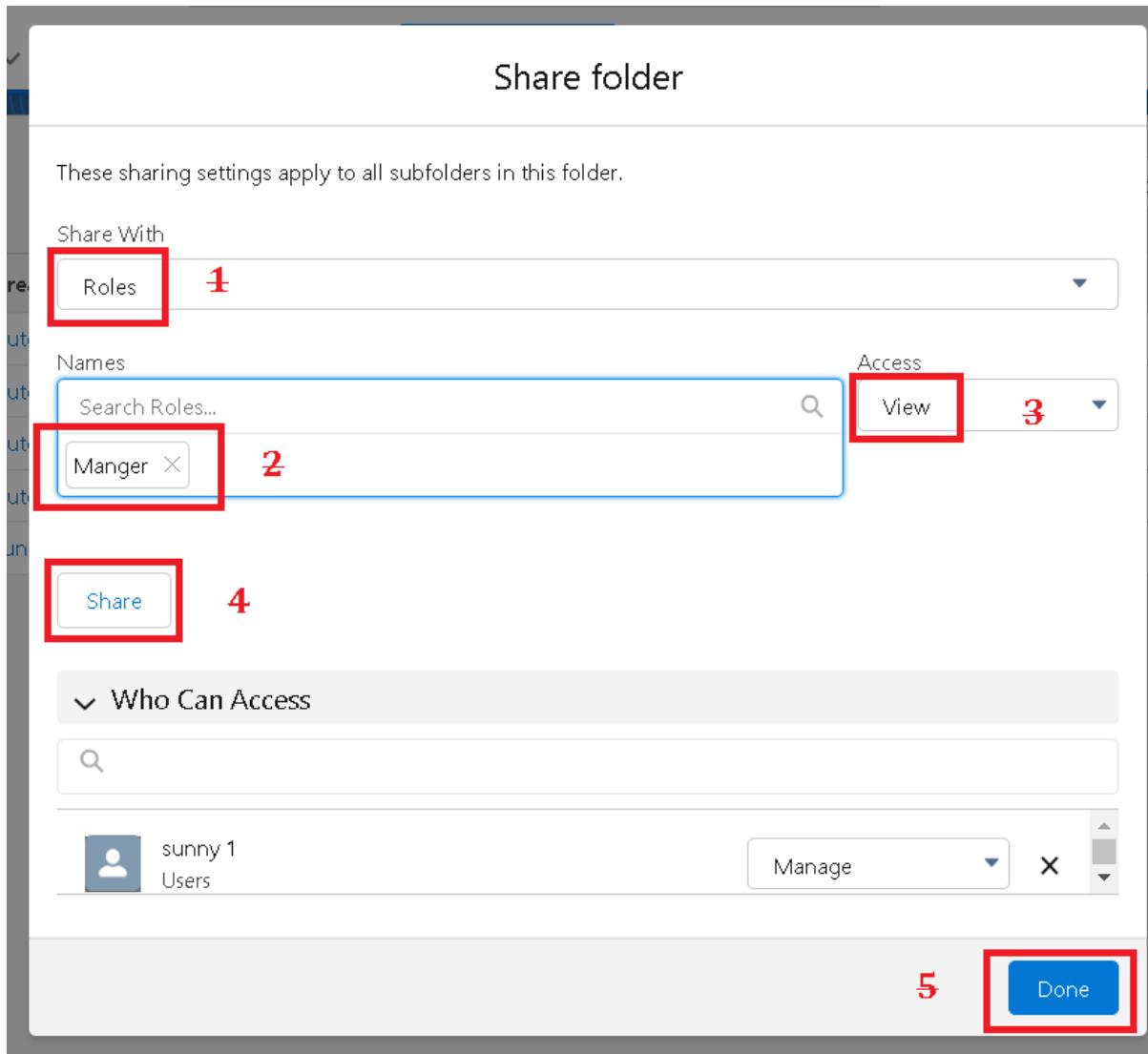
Row Counts

Detail Rows

Subtotals

Grand Total

5.



### 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 then click on the reports tab
2. Click New Report.

The screenshot shows the Microsoft Dynamics 365 interface. At the top, there's a navigation bar with links like Home, Employees, Assets, Asset Services, Projects, ProjectTasks, Reports (which has a red box around it), and Dashboards. Below this is a search bar labeled 'Search...'. On the left, there's a sidebar with 'Reports' and 'Recent' sections, followed by '2 items'. The main area is a table with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. Two rows are visible: 'Employee's working on projects report' and 'Assets assigned to Employees'. At the bottom right of the table area, there are buttons for 'Search recent reports...', 'New Report' (with a red box around it), 'New Folder', and a gear icon.

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

The screenshot shows the 'Create Report' dialog box. On the left, there's a sidebar with categories like Recently Used, All, Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, and Price Books, Products and Assets. A search bar at the top right contains the text 'gas'. The main area lists report types under 'Select a Report Type'. One item, 'Gas Stations with Buyers', is highlighted with a red box. To the right, a 'Details' pane shows the report type 'Gas Stations with Buyers' (Standard Report Type) and a large blue 'Start Report' button (with a red box around it). Other sections in the details pane include 'Created By You' (No Reports Yet), 'Created By Others' (No Reports Yet), and '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 > Outline Filters

Groups

GROUP ROWS

Add group...

Fuel Available in bunk  2

Fuel Available in bunk

GROUP COLUMNS

Add group...

Columns

Add column...  4

Customer name

# Fuel filled in vehicle

# Amount Paid

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

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  
ssasuke uchiha 50 ₹4,800.00  
naruto uzumaki 70 ₹6,720.00

Subtotal Total (7)

2,282 ₹2,19,072.00

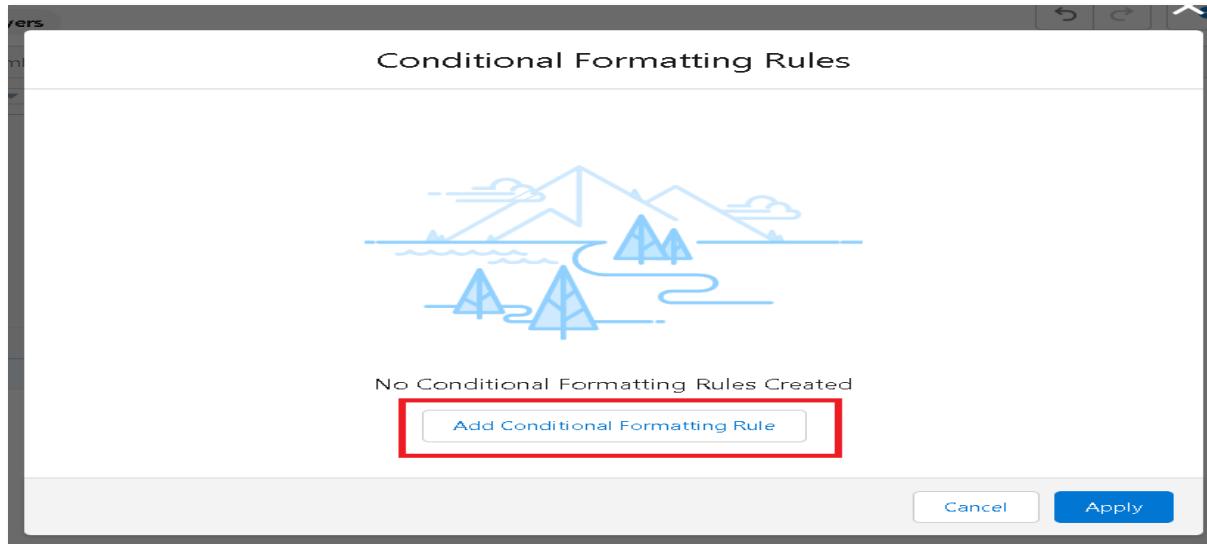
Total (7) 2,282 ₹2,19,072.00

Row Counts  Detail Rows  Subtotals  Grand Total

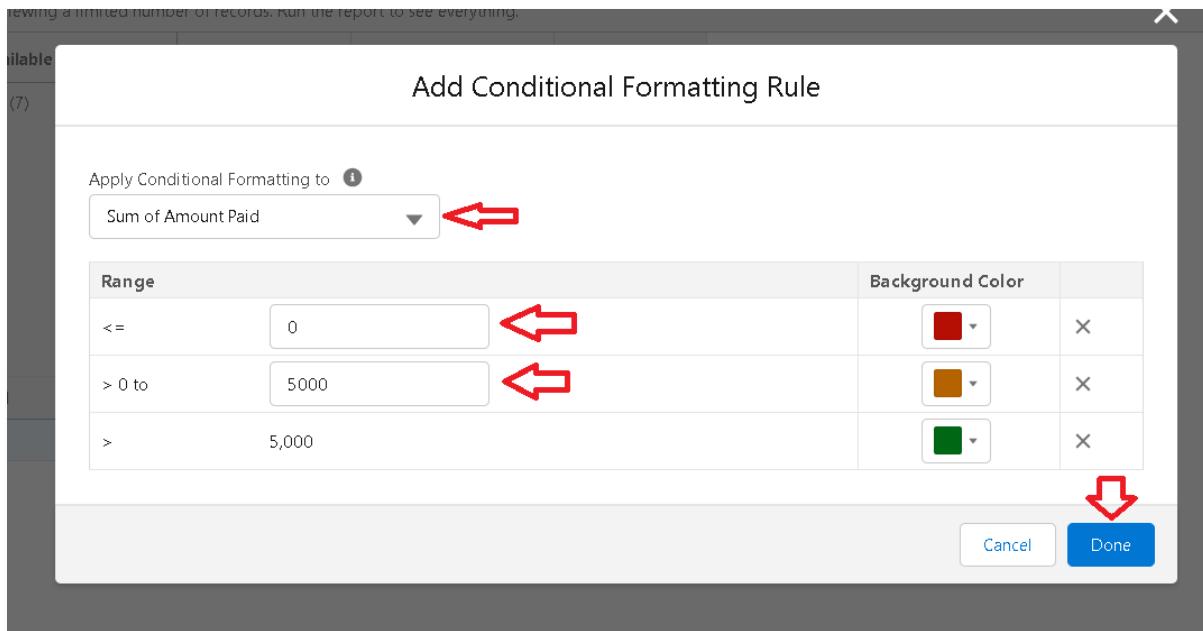
Update Preview Automatically

3  Conditional Formatting

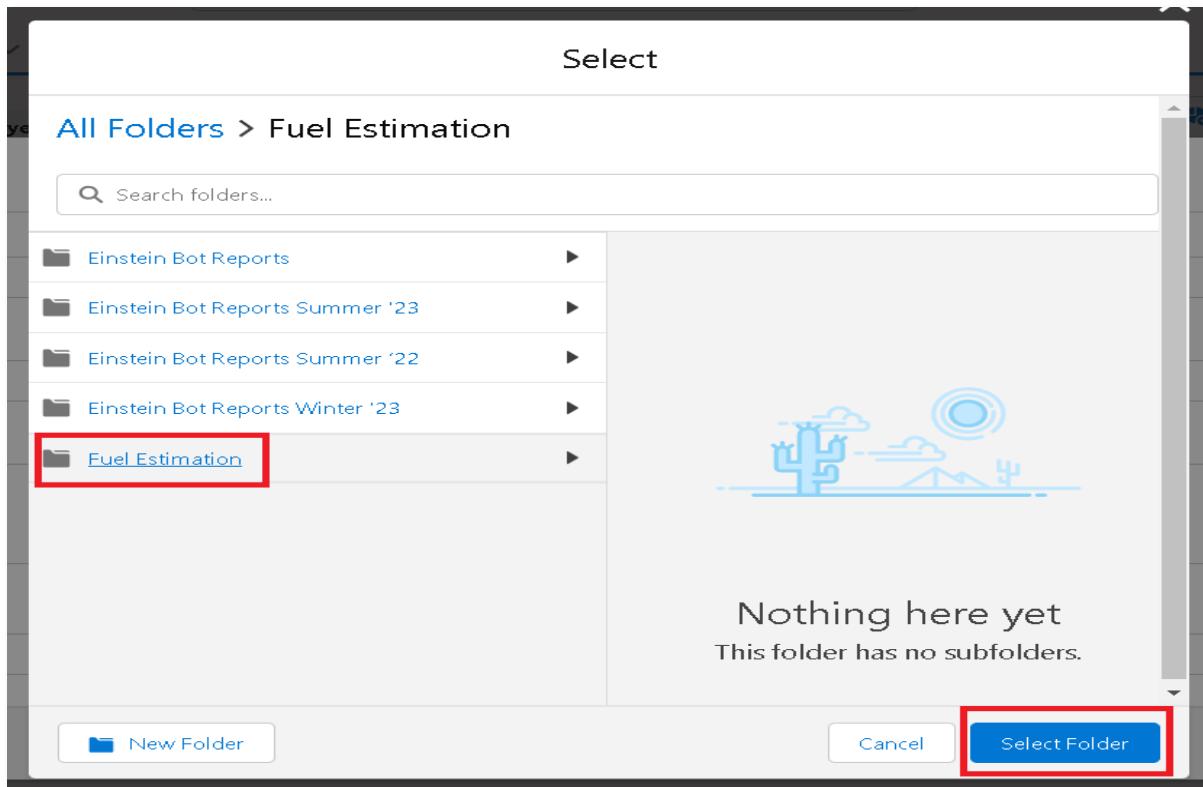
7. Click on conditional formatting located at the bottom of the preview pane.
8. Click on add conditional formatting rule.



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.



Report Name  1

Report Unique Name  2

Report Description

Folder  4

Select Folder  3

Cancel  5

Save  6

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

Report: Gas Stations with Buyers  
**Amount range**

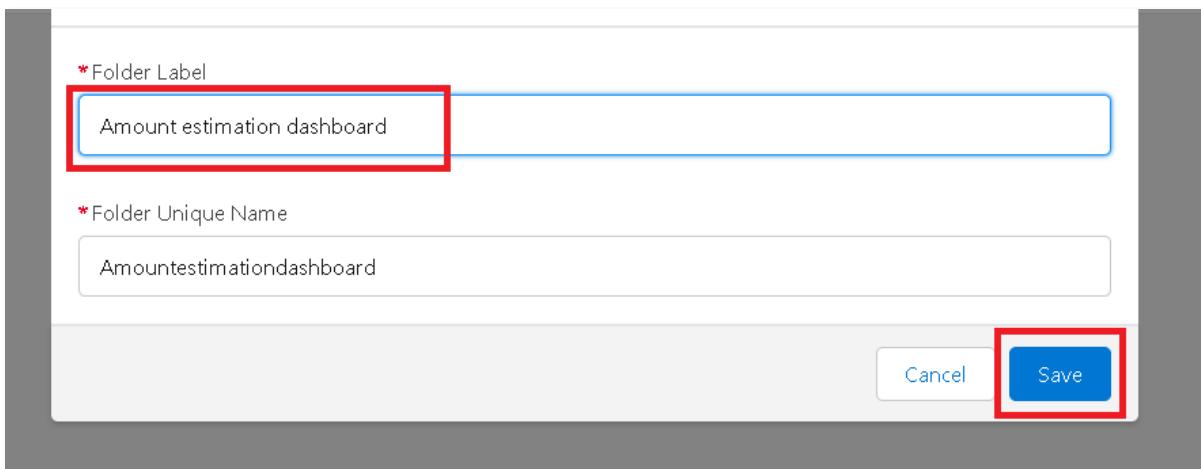
Total Records	Total Fuel filled in vehicle	Total Amount Paid	
7	2,282	₹2,19,072.00	
<input type="checkbox"/> Customer name ↑ ▼			
<input type="checkbox"/> bunny g (1) 2,718.00 (1)			
		15	₹1,440.00
Subtotal		15	₹1,440.00
<b>Subtotal</b> 15 ₹1,440.00			
<input type="checkbox"/> drug dealer (1) 2,718.00 (1)			
		2,000	₹1,92,000.00
Subtotal		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
Subtotal		70	₹6,720.00
<b>Subtotal</b> 70 ₹6,720.00			
<input type="checkbox"/> sandeep gujja (1) 2,718.00 (1)			
		7	₹672.00
Subtotal		7	₹672.00
<b>Subtotal</b> 7 ₹672.00			
<input type="checkbox"/> sasuke uchiha (1) 2,718.00 (1)			
		50	₹4,800.00
Subtotal		50	₹4,800.00
<b>Subtotal</b> 50 ₹4,800.00			
Row Counts <input checked="" type="checkbox"/>		Detail Rows <input checked="" type="checkbox"/>	Subtotals <input checked="" type="checkbox"/>
Grand Total <input checked="" type="checkbox"/>			

# 14.Dashboards

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

## 14.1 Create Dashboard Folder

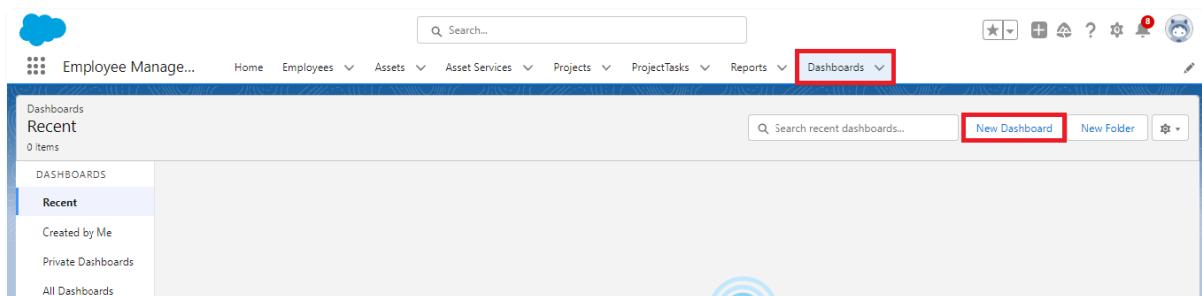
1. Click on the app launcher and search for dashboard.
2. Click on dashboard tab.
3. Click new folder, give the folder label as "Amount estimation dashboard".
4. Folder unique name will be auto populated.
5. Click save.



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

## 14.2 Create Dashboard

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



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

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

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

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

Cancel Select

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

6. Preview is shown below.

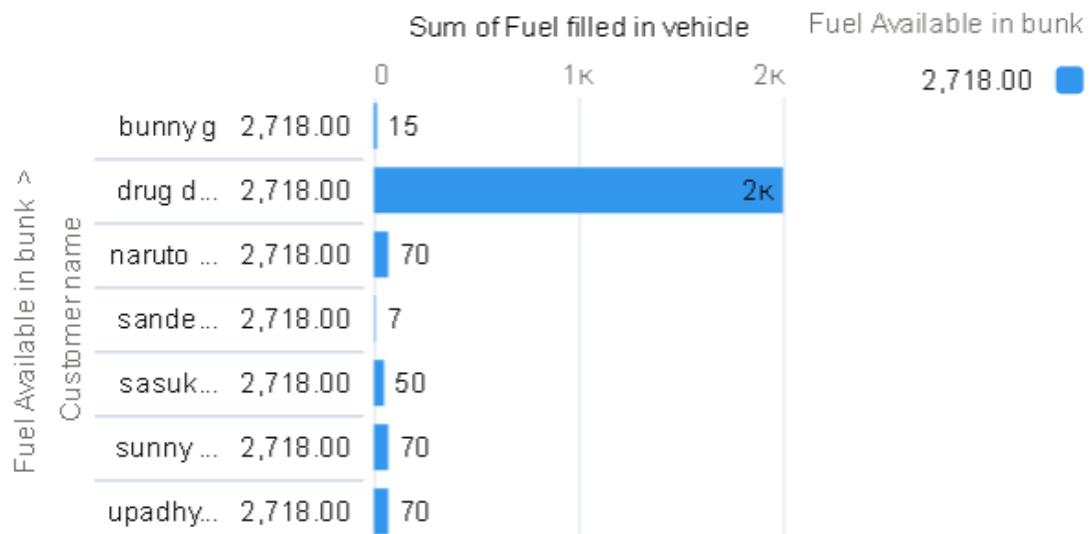


Dashboard

## Estimation amount

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

### Amount range

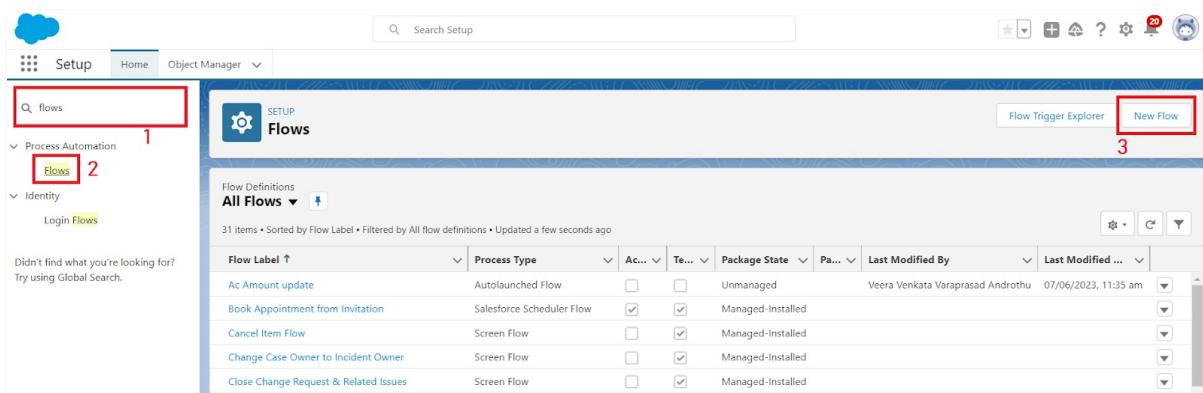
[View Report \(Amount range\)](#)

# 15.Flows

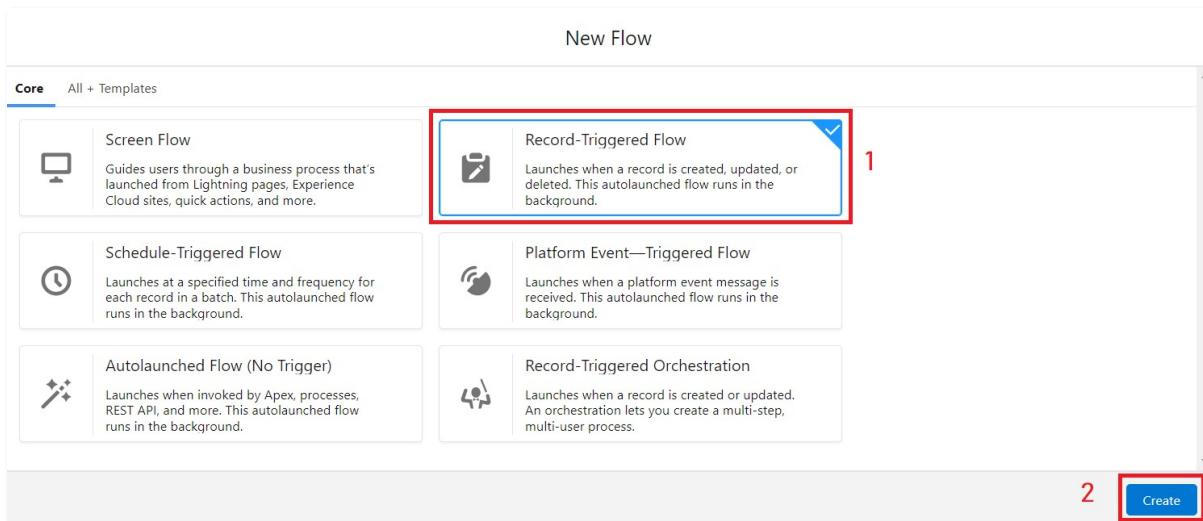
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

## 15.1Create a Flow

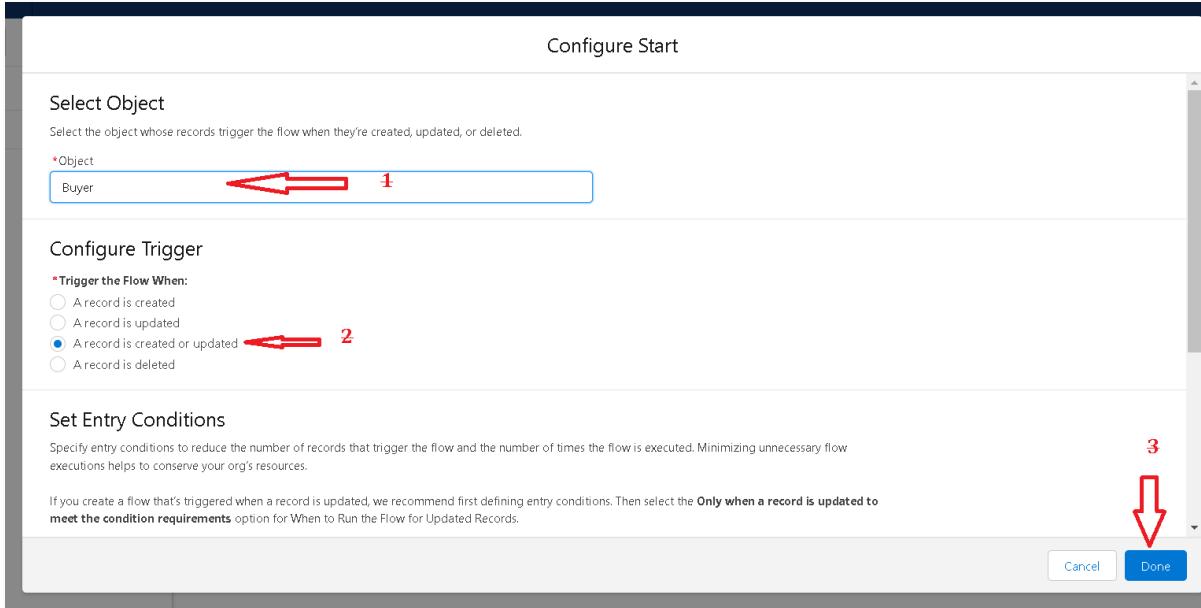
1. Go to setup then type Flow in quick find box then Click on the Flow and Select the New Flow.



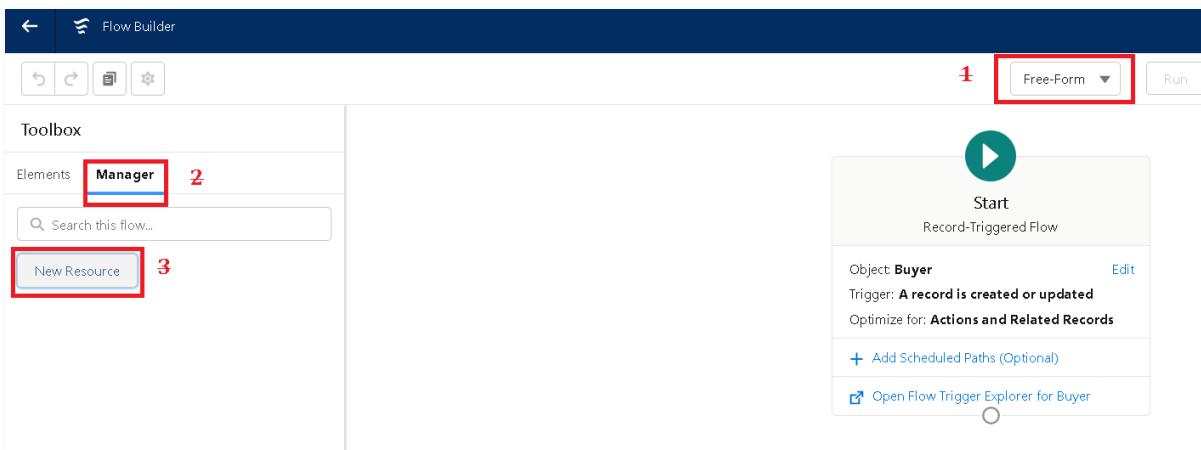
2. Select the Record-triggered flow and Click on Create.

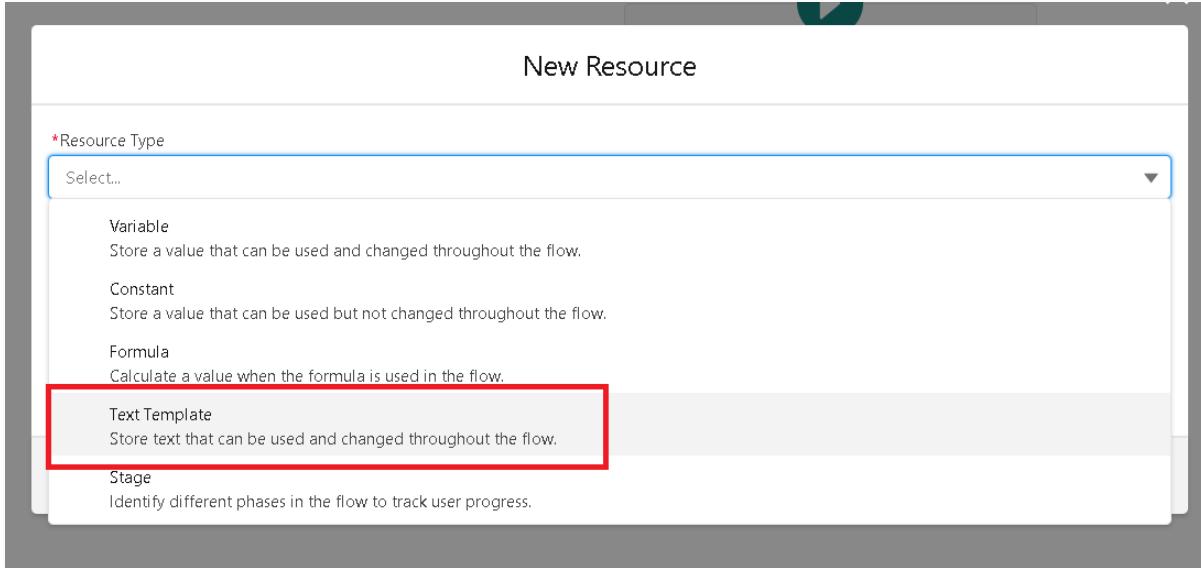


3. Select the Object as a “buyer” in the Drop down list.
4. Select the Trigger Flow when: “A record is Created or Updated”.
5. Select the Optimize the flow for: “Actions and Related Records” and Click on Done.



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





9. Enter the API name as “ emailbody”.

10. In body field paste the syntax that given below.

Hello {!\$Record.Customer\_name\_c},

Thank you for coming , we are glad and considering that we provided the best survise.

RECEPIT DETAILS :

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

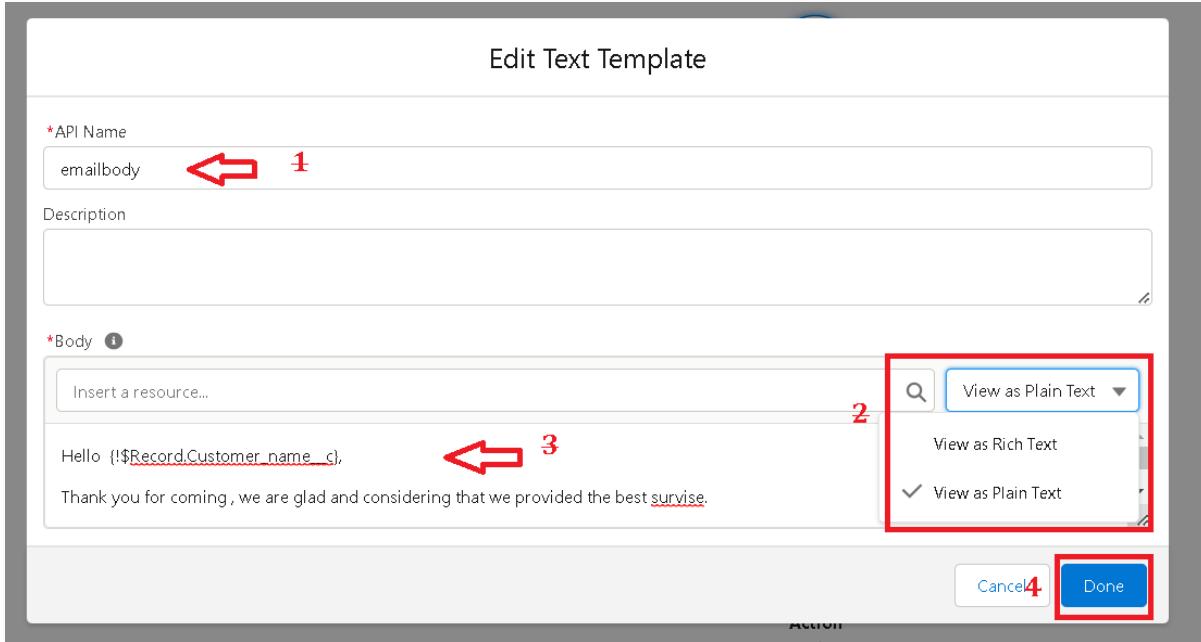
Amount paid by Customer : {!\$Record.Amount\_Paid\_c}

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

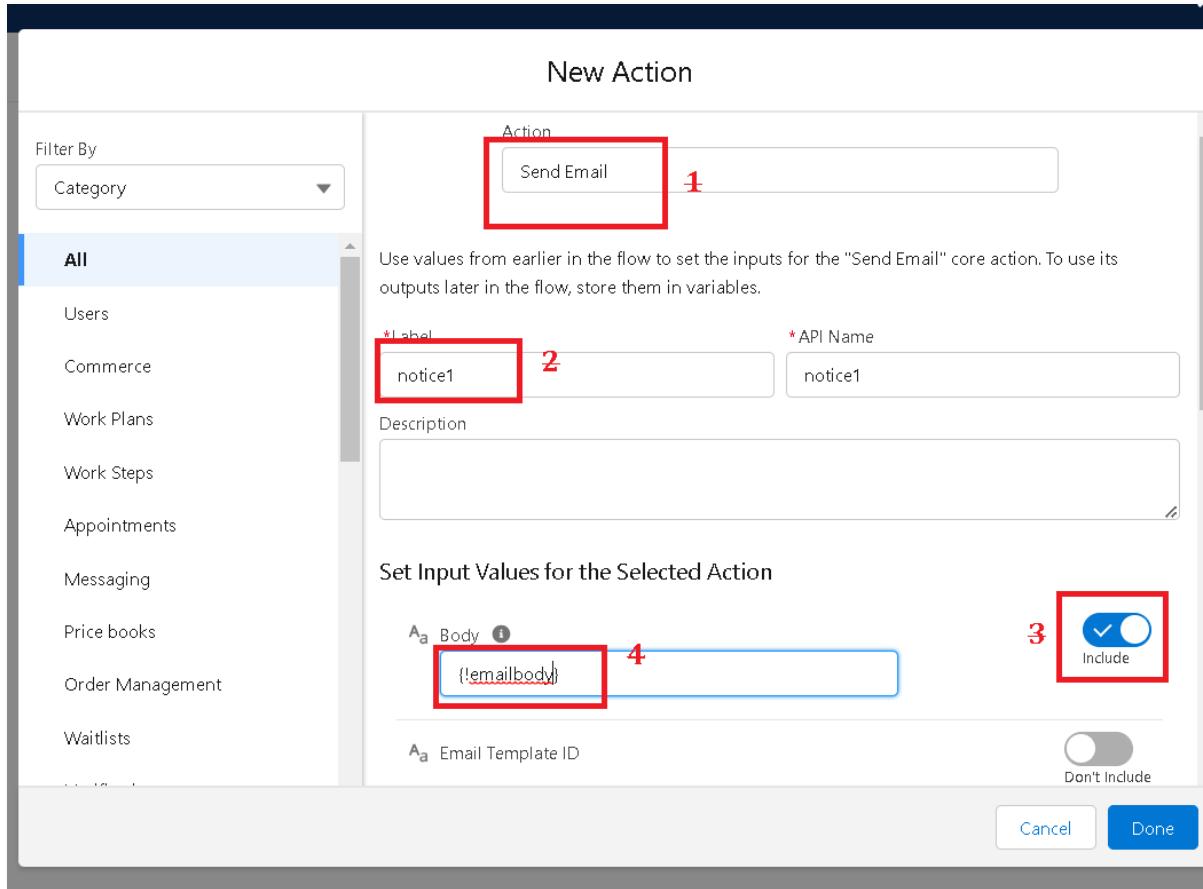
Fuel intake in vehicle : {!\$Record.Fuel\_filled\_in\_vehicle\_c}

11. Change the view as Rich Text then View to Plain Text.

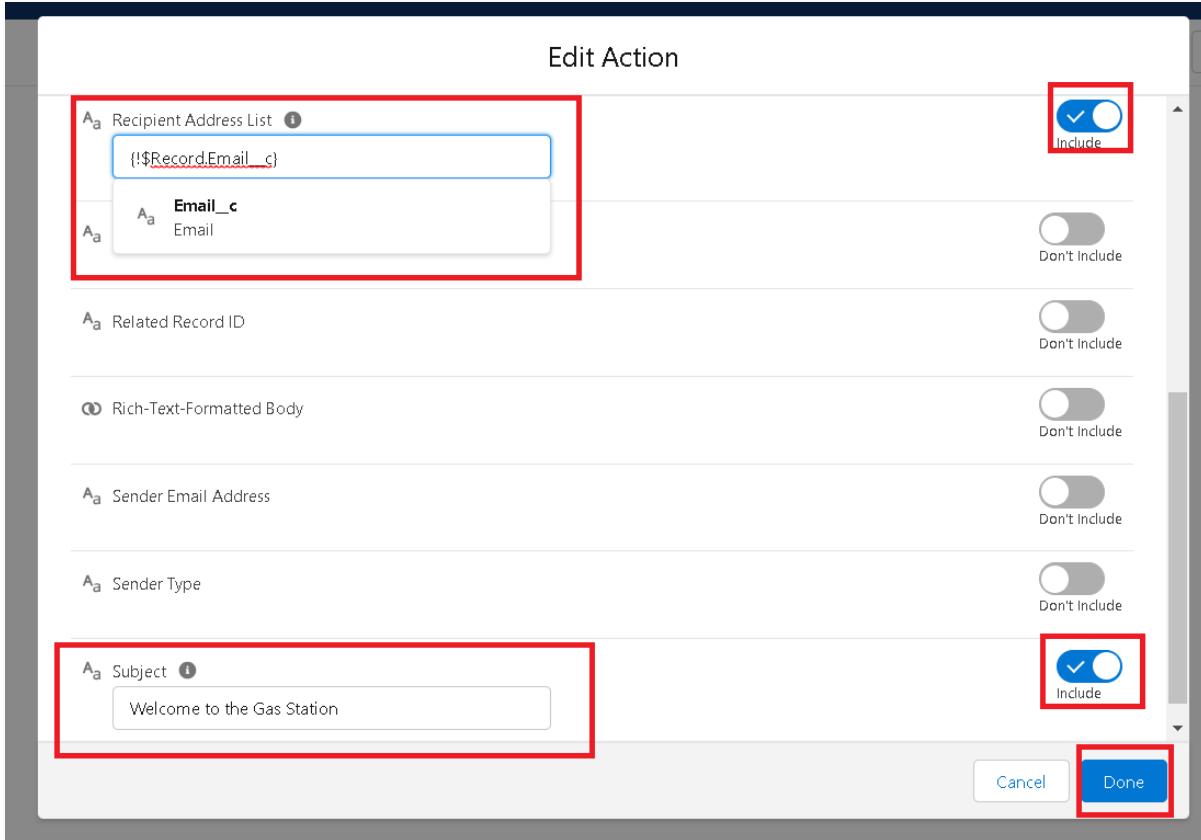
12. Click done.



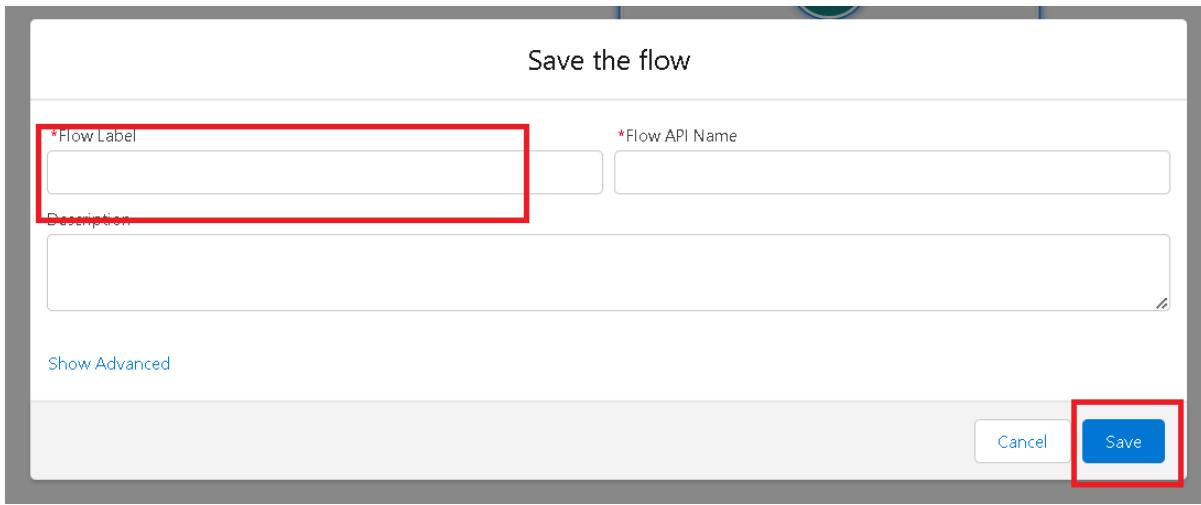
13. Now click on elements, and drag the action element into the preview pane.
14. Their action bar will be opened in that search for “ send email ” and click on it.
15. Give the label name as “ notice ”
16. API name will be auto populated.
17. Enable the body in set input values for the selected action.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

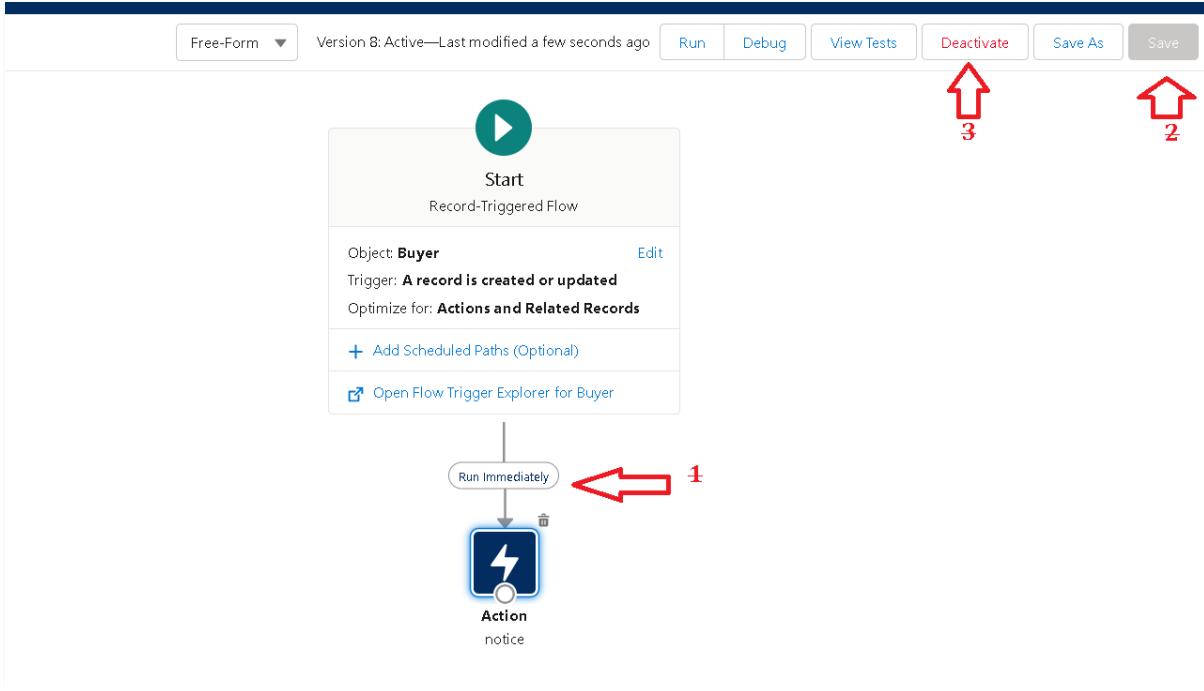


19. Include recipient address list select the email form the record.
20. Include subject as “ welcome to gas station”.
21. Click done.



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.





# **Conclusion**

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