

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

**by**

**M.AKASH SATYA SRINIVAS  
akasheee26@gmail.com**

## **PROJECT ABSTRACT**

In the dynamic landscape of the fuel retail sector, operational efficiency and customer engagement are paramount for sustained growth. This application proposes an advanced **Customer Relationship Management (CRM)** system tailored for administrators of gas filling stations. By consolidating essential functionalities such as real-time inventory management, customer segmentation, and comprehensive sales analytics, the platform enhances operational oversight and decision-making capabilities.

Administrators can efficiently monitor fuel supply levels, optimize workforce performance, and execute targeted marketing campaigns, ultimately fostering a deeper connection with customers. The **CRM** system also facilitates streamlined communication channels, enabling personalized interactions that drive customer loyalty and satisfaction. Through this innovative approach, gas filling stations can improve their operational workflows while adapting to market trends and consumer preferences, thereby securing a competitive edge in a rapidly evolving industry.

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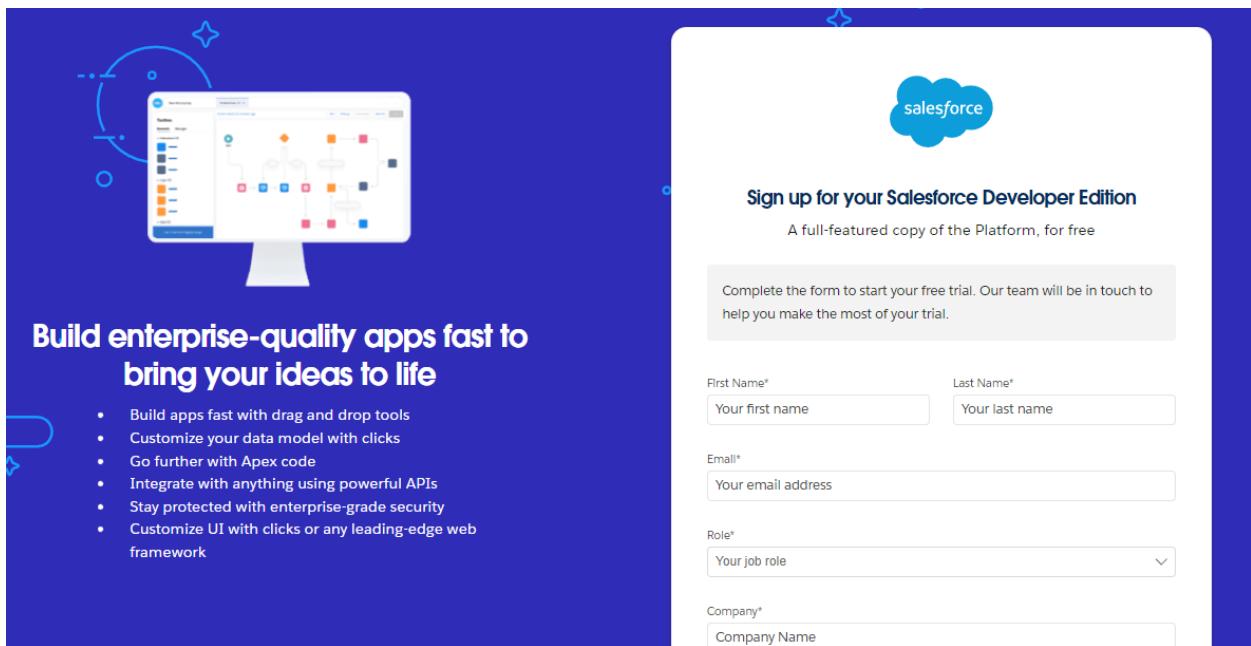
## 1.Salesforce

### **Introduction to Salesforce:**

Salesforce is a cloud-based customer relationship management (CRM) platform designed to help businesses manage their relationships and interactions with customers and potential customers. It provides a suite of tools for sales, marketing, customer service, and analytics, enabling organizations to streamline processes, enhance customer engagement, and drive growth.

### **Creating Developer Account**

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



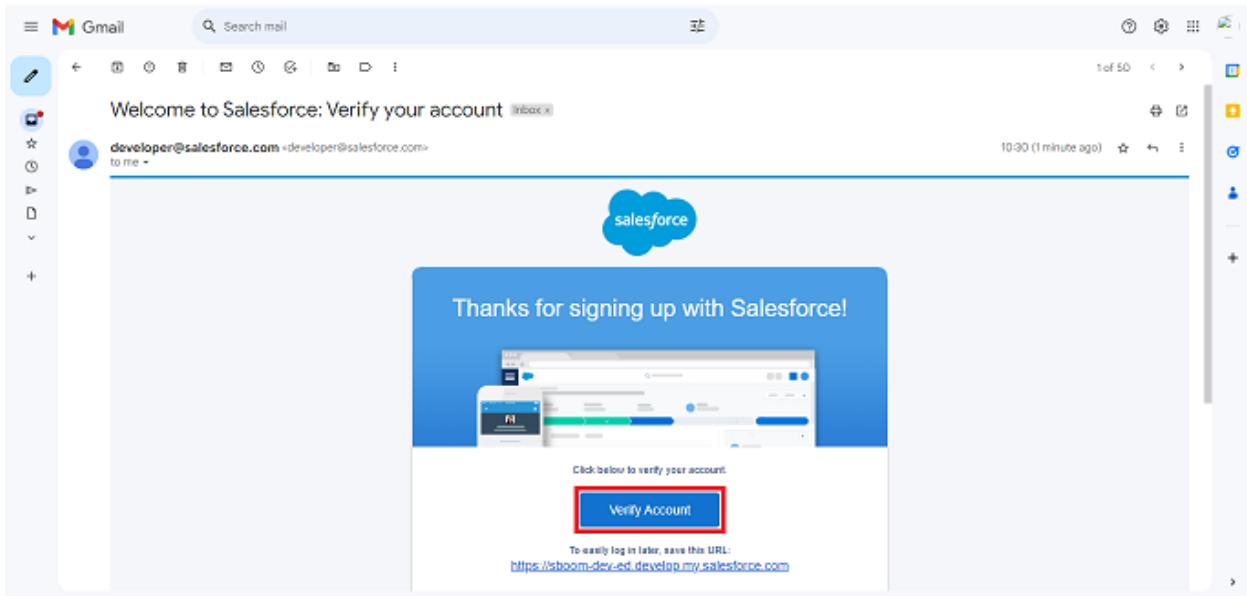
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code

Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format :  
username@organization.com

## 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.

## Change Your Password

Enter a new password for lead@sb.com.

Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

\* New Password  
..... Good

\* Confirm New Password  
..... Match

Security Question  
▼ In what city were you born?

\* Answer  
asdfghjkl

**Change Password**

The screenshot shows the Salesforce Setup Home page. The top navigation bar includes icons for Home, Object Manager, and various system settings. The main content area features a "SETUP Home" header with three cards: "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative Docs". The sidebar on the left lists administrative links such as Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (with a sub-item for Users).

## 2. Object

### What Is an Object?

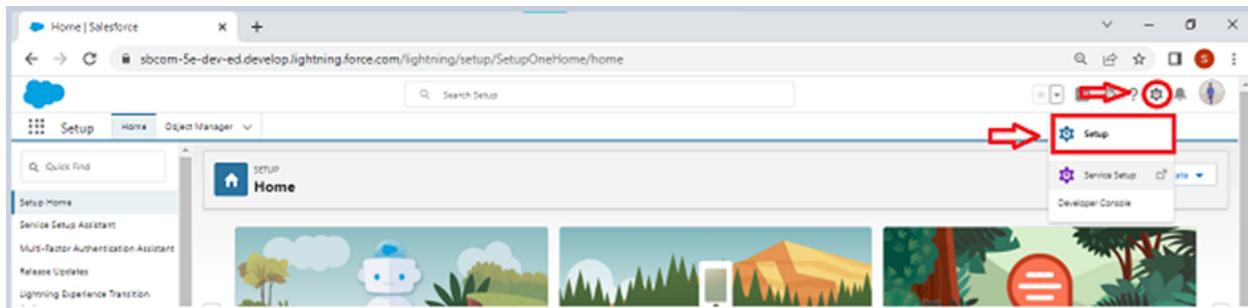
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

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

**New Custom Object**

**Custom Object Definition Edit**

**Custom Object Information**

The singular and plural labels are used in tabs, page layouts, and reports.

Label:  Example: Account (arrow)

Plural Label:  Example: Accounts (arrow)

Starts with record name

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

Object Name:  Example: Account (arrow)

Description:

Contact-sensitive help setting:

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Content name:  -None-

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, 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:  Text

**Optional Features**

- Allow Reports (arrow)
- Allow Activities (arrow)
- 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 (arrow)

**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

**Action Buttons**

## Create Supplier Object

To create an object:

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

2.click on Allow reports and Track Field History.

## Create Gas Station Object

To create an object:

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

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

# 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)

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The 'Custom Object Tabs' section lists various tabs with their descriptions and styles. A red box highlights the 'New' button at the top right of the list.

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

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

(Optional) Choose a Home Page Custom Splash Page Custom Link: supplier

Description:

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

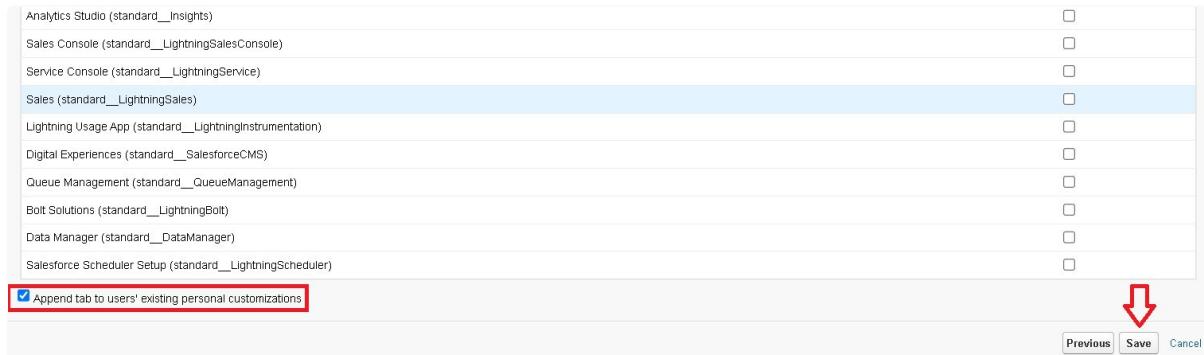
**Save** **Cancel**

**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"/>



## 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.

### Create a Lightning App

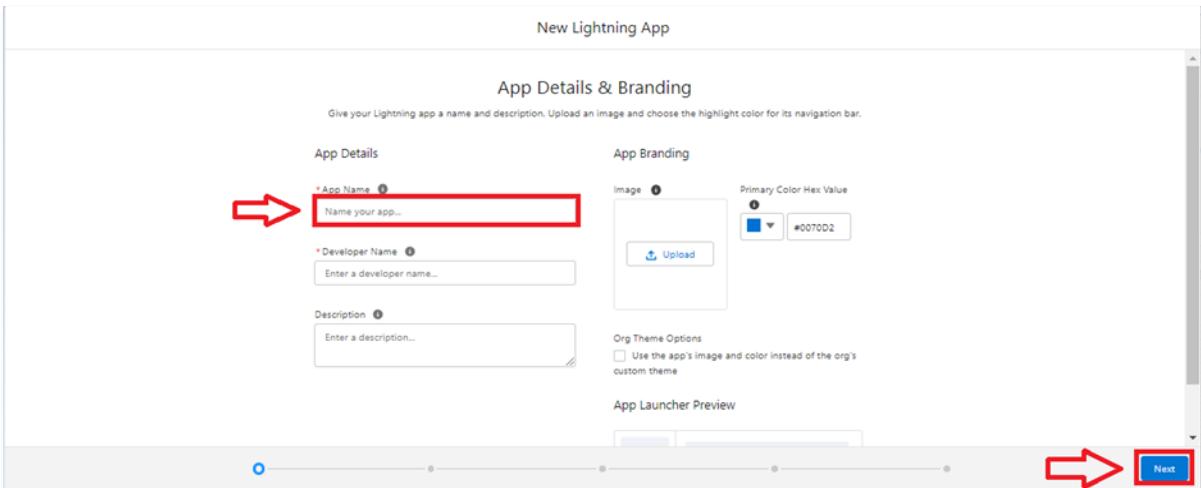
#### To create a lightning app page:

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

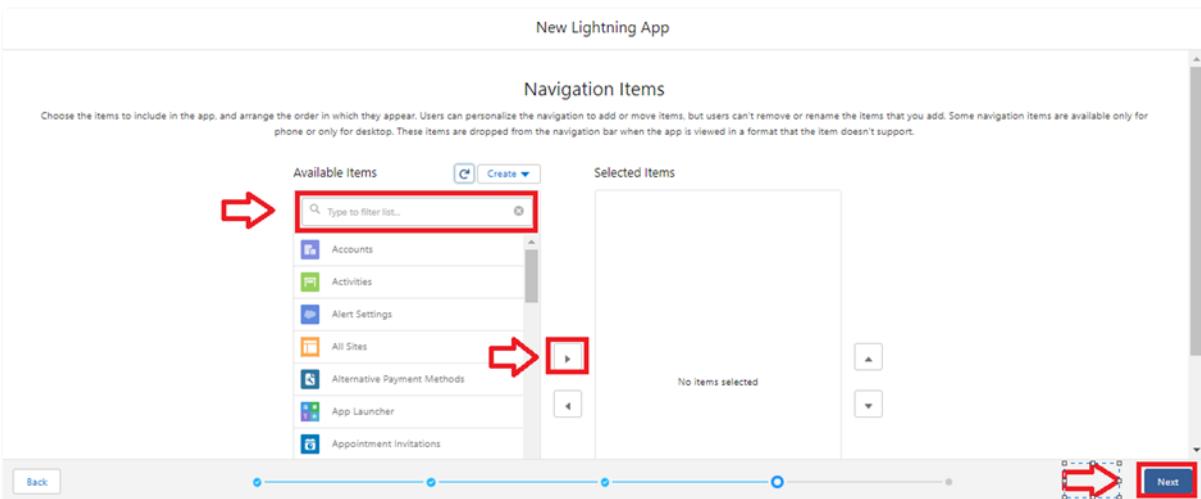
The screenshot shows the Salesforce App Manager interface. At the top, there's a search bar with 'Search Setup' and a 'New' button. Below it, a navigation bar has 'App Manager' selected. A red box highlights the 'App Manager' link in the top-left corner. Another red box highlights the 'Clone Apps(Beta)' link below it. A third red box highlights the 'New Lightning App' button in the top-right corner. The main content area displays a table of existing apps, with the first few rows shown below:

App Name	Developer Name	Description	Last Modified	App Type
All Tabs	AltTabSet		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 tabs	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
Chatter Desktop	Chatter/Desktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected...	28/12/2022, 4:04 pm	Connected (Managed)
Chatter Mobile for BlackBerry	ChatterForBlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view feed...	28/12/2022, 4:05 pm	Connected (Managed)
College Management System	Haadeen	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 ?Next ? (App option page) keep it as default ? Next ? (Utility Items) keep it as default ? Next.

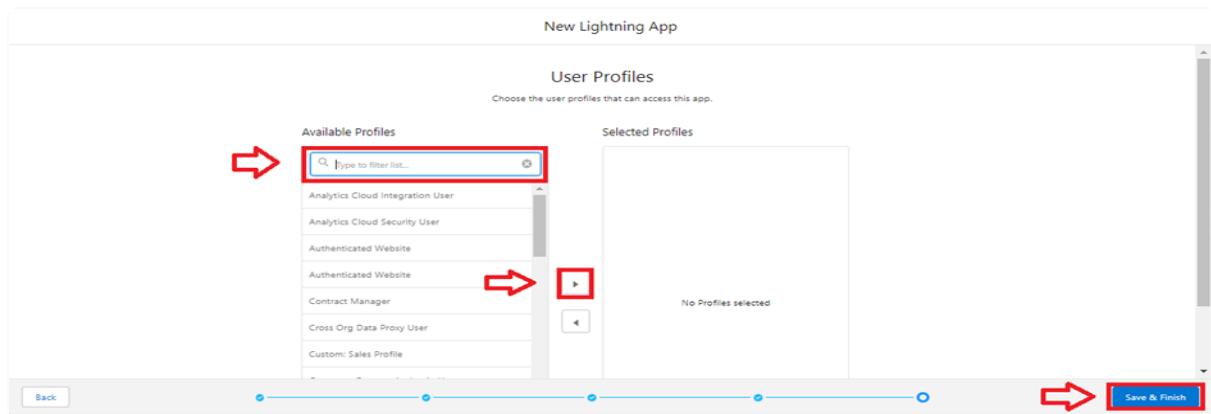


### 3. To Add Navigation Items:



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

### **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 Setup page with the 'Object Manager' tab selected. A red box highlights the 'Object Manager' tab in the top navigation bar. Another red box highlights the 'Fuel' object in the list, which is currently selected. A third red box highlights the 'Create' button in the top right corner of the list area.

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

The screenshot shows the 'Supplier' object's 'Fields & Relationships' section. A red box highlights the 'Fields & Relationships' tab in the left sidebar. Another red box highlights the 'New' button at the top of the main list area. The list displays various fields like 'Created By', 'Last Modified By', 'Owner', 'Sum of Fuel supplied', and 'supplier Name'.

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. A yellow arrow points to the 'Next' button in the top right corner.

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

The screenshot shows the 'New Relationship' wizard. In Step 2, the user is selecting a related object. The 'Related To' dropdown is set to 'Supplier'. The 'Next' button is highlighted with a red arrow.

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

6. Next ? Next ? Save & New.

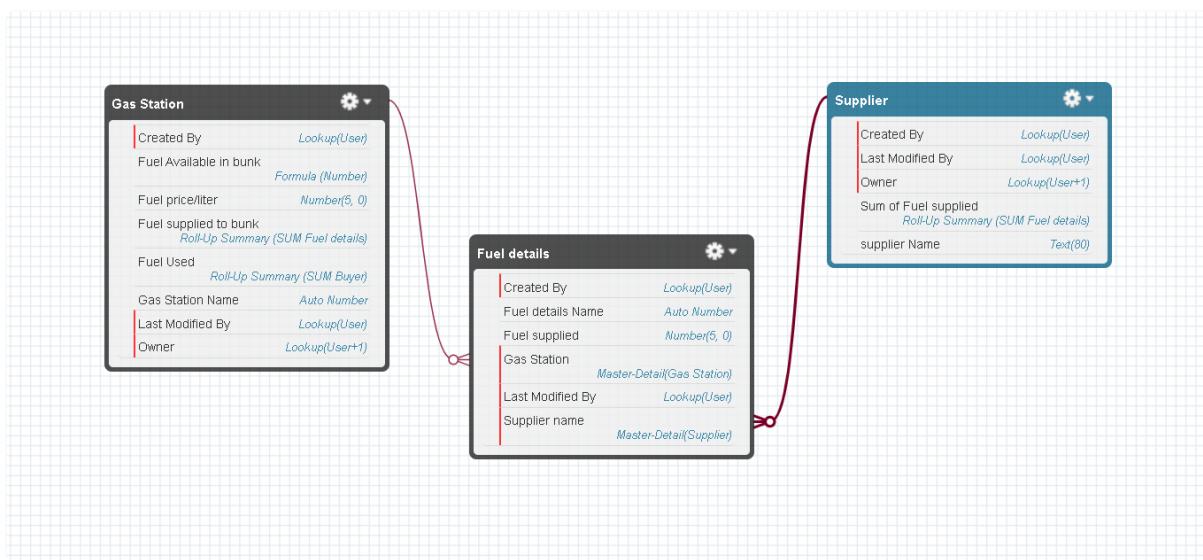
7. Follow the same steps from 1 to 3.

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.



## 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.

## 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? Next ? Save.

## 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 is a search bar with the word "student". Below it, a table lists two objects: "Student" and "Student Activity". The "Student" object is highlighted with a red box around its API name "Student". A red arrow points from the text in step 1 to this highlighted area. Another red box highlights the "Create" button at the top right, and a red arrow points from the text in step 1 to it.

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

The screenshot shows the "Fields & Relationships" page for the "Student" object. On the left, there is a sidebar with various options like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays a table of fields. A red box highlights the "Fields & Relationships" tab in the sidebar, and a red arrow points from the text in step 2 to it. Another red box highlights the "New" button at the top right, and a red arrow points from the text in step 2 to it.

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

The screenshot shows the "Data Type" selection screen. It has a title "Specify the type of information that the custom field will contain." and a "Next" button with a red arrow pointing to it. The "None Selected" option is selected. Other options shown are "Auto Number", "Formula", "Roll-Up Summary" (which is highlighted with a red box), "Lookup Relationship", and "Master-Detail Relationship". Each option has a brief description below it.

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

Field Label: Sum of Fuel supplied Sum\_of\_Fuel\_supplied i

Field Name: Sum\_of\_Fuel\_supplied i

Description:

Help Text:

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

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 ? Next ? Save.

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize

Master Object: Supplier  
Summarized Object: Fuel details i

Select Roll-Up Type

COUNT  
 SUM Fuel supplied i  
 MIN  
 MAX

Field to Aggregate: Fuel supplied i

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.

## 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

Step 2 of 5

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: [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\_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 section to use additional fields, operators, and functions.

**Example:** Fahrenheit = 1.8 \* Celsius\_c + 32 [More Examples...](#)

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

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

FuelAvailable\_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 ? 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.

## Creating Cross Object Formula Field in Buyer Object

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

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

1. Go to setup ? click on Object Manager ? type object name(Buyer) in search bar ? click on the object.
2. Click on fields & relationship ? click on New.
3. Select Data type as “Formula” and click Next.
4. Give Field Label and Field Name as “Amount Paid ” and select formula return type as “Number” and click next.

**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: `[Meet = NOW() + 4]`

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.

Advanced Formula

Formula Return Type: **Currency**    Decimal Places: **2**

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...](#)

**Simple Formula** **Advanced Formula** **Insert Operator**

**Insert Field** **Functions** [-- All Function Categories --](#)

`Amount Paid (Currency) =  
Fuel_filled_in_vehicle__c * Gas_Station_name__r.Fuel_price_liter__c`

**Formula Editor**

**Quick Tips** [Getting Started](#) [Operators & Functions](#)

## 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.

Step 2. Enter the details

Step 2 of 4

Field Label: Vehicle type

Values:

- Use global picklist value set
- Enter values, with each value separated by a new line

Two Wheeler  
Three Wheeler  
Four Wheeler  
Six Wheeler  
Eight Wheeler  
Others

Display values alphabetically, not in the order entered

Use first value as default value

Restrict picklist to the values defined in the value set

Field Name: Vehicle\_type

Description:

Previous Next 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.

## 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 > 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  
Help on this function

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

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

### **Creating the page layout**

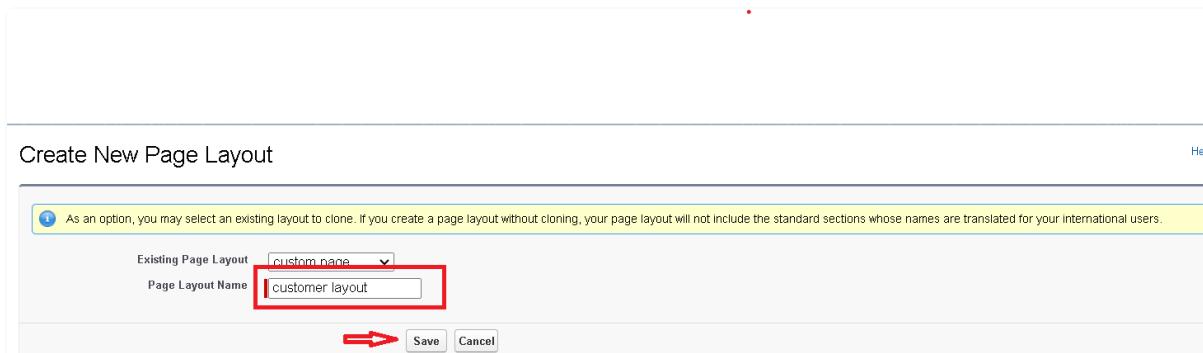
#### **To Create a Page layout:**

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.



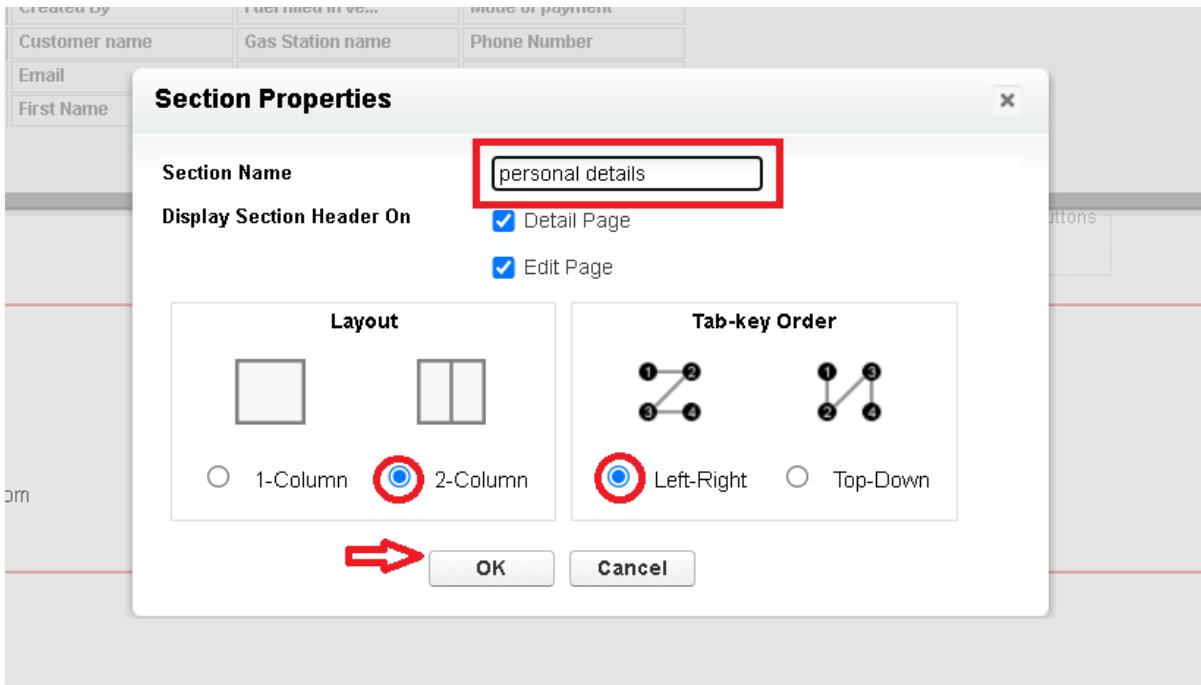
The screenshot shows the Salesforce Object Manager for the 'Buyer' object. In the 'Page Layouts' section, there is one item listed: 'Buyer Layout'. The 'New' button is highlighted with a red arrow.

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 includes a note about cloning layouts and fields for international users. The 'Existing Page Layout' dropdown is set to 'custom page' and the 'Page Layout Name' field contains 'customer layout'. The 'Save' button is highlighted with a red arrow.

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
Section	Customer name	Gas Station name	Phone Number
Blank Space			
Amount Paid	Email	Last Modified By	Vehicle type
Buyer number	First Name	Last Name	

## **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:**

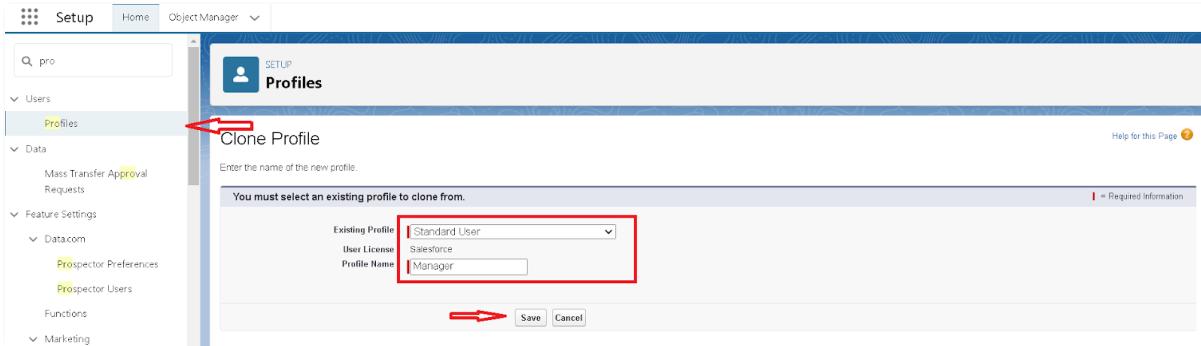
Custom ones defined by us.

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

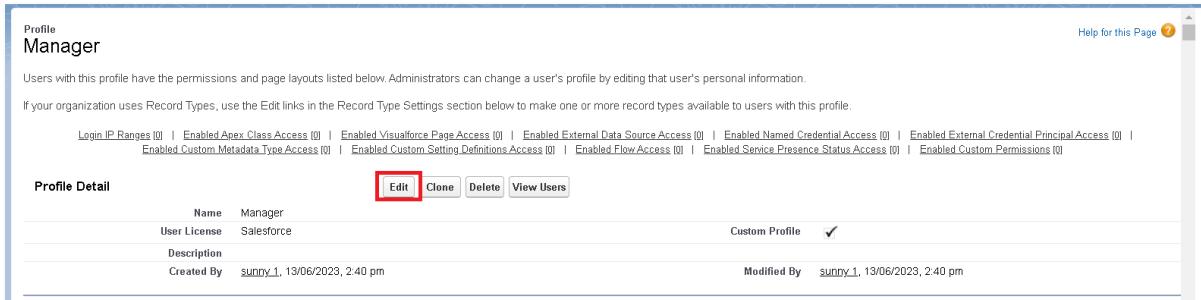
## **Manager Profile**

### **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.



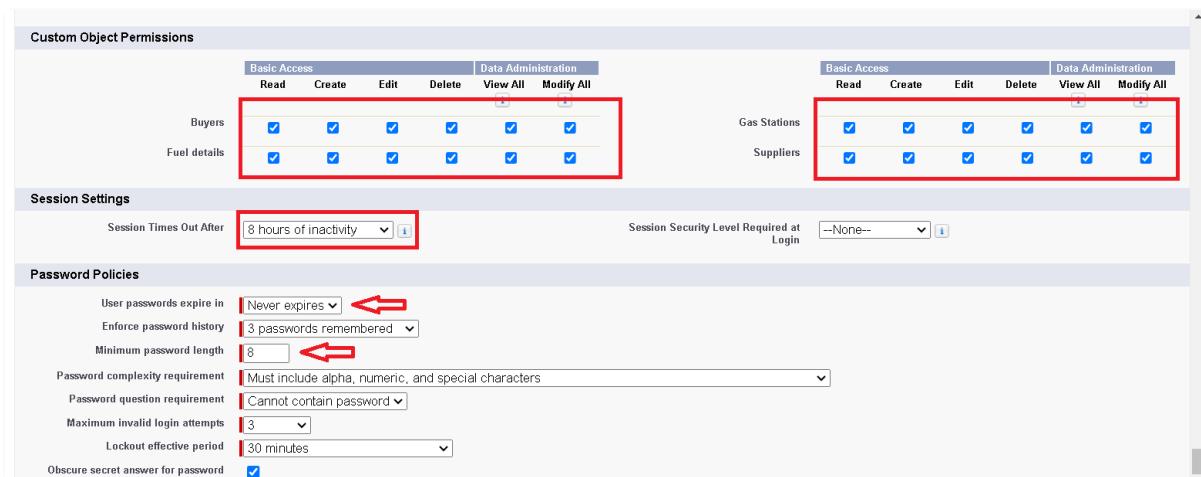
2. While still on the profile page, then click Edit.



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

## 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
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"/>
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"/>
Gas Stations	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. And click save.

## 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
Buyers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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"/>				
Gas Stations	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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 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.

### 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. Below it, the 'Home' and 'Object Manager' options are visible. A search bar is present, with the word 'roles' typed into it. A red box highlights the 'Roles' link under the 'Users' category in the sidebar. The main content area is titled 'Understanding Roles' and contains a 'Sample Role Hierarchy' diagram. The diagram shows a hierarchy from 'Executive Staff' down to 'Western Sales Rep' and 'Eastern Sales Rep'. Each role has associated permissions. At the bottom right of the main content area is a 'Set Up Roles' button, which is also highlighted with a red box.

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. At the top left, there is a 'Collapse All' and 'Expand All' button, with 'Expand All' highlighted by a red box. The page displays a hierarchical list of roles under 'Nick Enterprises'. The 'CEO' role is expanded, showing its edit, delete, and assign options. Underneath 'CEO', the 'HR' role is expanded, followed by 'Manager', 'On Site Emp', and 'Remote Emp', each with their own edit, delete, and assign options. At the bottom of the list, there is another 'Add Role' button, which is also 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		

Save Save & New Cancel

## 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

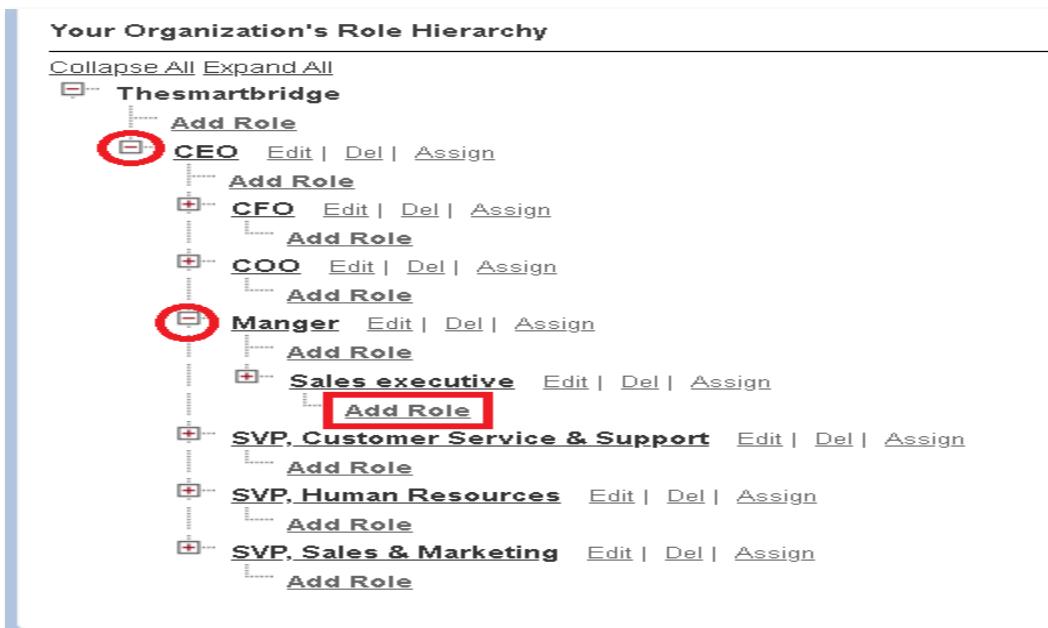
3. Give Label as “sales executive” and Role name gets auto populated. Then click on Save.

Role Edit  
New Role

Help for this Page ?

Role Edit	
Label	<input type="text" value="Sales executive"/> <span style="color: red;">➡</span>
Role Name	<input type="text" value="Sales_executive"/> <span style="color: blue;">i</span>
This role reports to	<input type="text" value="Manger"/> <span style="color: blue;">🔍</span>
Role Name as displayed on reports	<input type="text"/>
<span style="color: red;">➡</span> <span>Save</span> <span>Save &amp; New</span> <span>Cancel</span>	

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"/> <span style="color: red;">➡</span>
Role Name	<input type="text" value="Sales_person"/> <span style="color: blue;">i</span>
This role reports to	<input type="text" value="Sales executive"/> <span style="color: blue;">🔍</span>
Role Name as displayed on reports	<input type="text"/>
<span style="color: red;">➡</span> <span>Save</span> <span>Save &amp; New</span> <span>Cancel</span>	

## 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.

### 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

General Information

Required Information

Save Save & New Cancel

Field	Value
First Name	Niklaus
Last Name	Mikaelson
Alias	nika
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	[checkbox]
Offline User	[checkbox]
Knowledge User	[checkbox]
Flow User	[checkbox]
Service Cloud User	[checkbox]
Site.com Contributor User	[checkbox]
Site.com Publisher User	[checkbox]
WDC User	[checkbox]
Data.com User Type	--None--

3. Save.

## **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

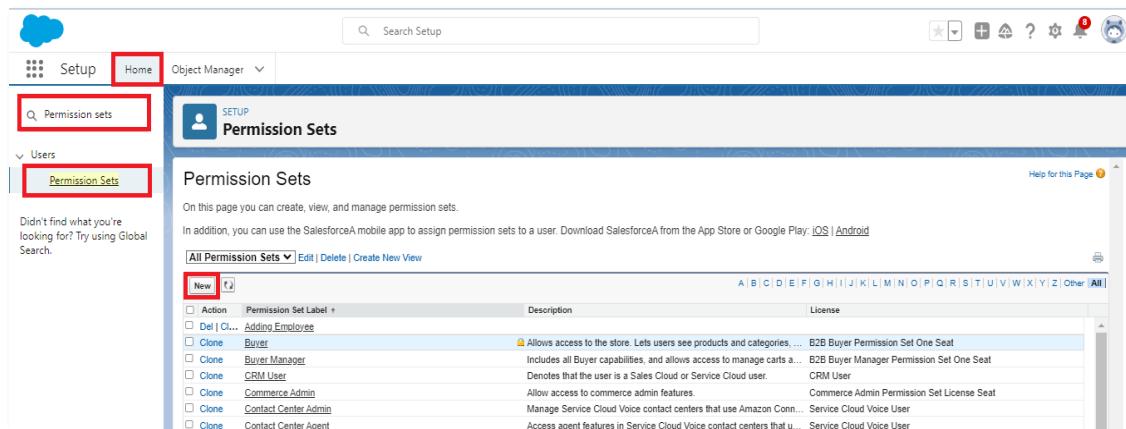
## 10.Permission sets

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.

### Creating permission set

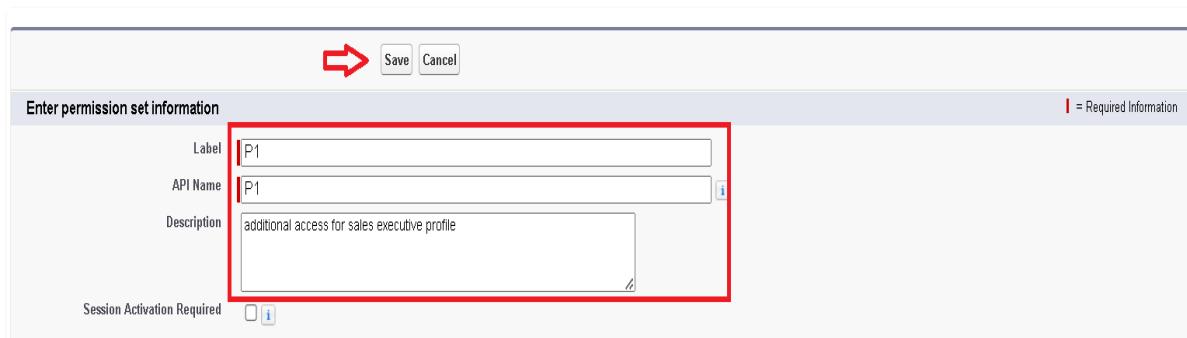
A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission 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' highlighted by a red box. Below the navigation is a search bar labeled 'Search Setup'. On the left, there's a sidebar with 'Users' expanded, showing 'Permission Sets' which is also highlighted by a red box. The main content area is titled 'Permission Sets' and contains a table of existing permission sets like 'Buyer', 'Buyer Manager', etc. At the bottom of the table, there's a 'New' button highlighted by a red box.

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



The screenshot shows a dialog box titled 'Enter permission set information'. It contains fields for 'Label' (with 'P1' entered), 'API Name' (with 'P1' entered), 'Description' (with '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.

**Assigned Apps**  
Settings that specify which apps are visible in the app menu

**Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu

**Object Settings** (Permissions to access objects and fields, and settings such as tab availability)

**App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"

**Apex Class Access**  
Permissions to execute Apex classes

**Visualforce Page Access**  
Permissions to execute Visualforce pages

**External Data Source Access**  
Permissions to authenticate against external data sources

**Flow Access**  
Permissions to execute Flows

**Named Credential Access**  
Permissions to authenticate against named credentials

**Custom Permissions**  
Permissions to access custom processes and apps

**Custom Metadata Types**  
Permissions to access custom metadata types

**Custom Setting Definitions**  
Permissions to access custom settings

4. 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** (highlighted)

Permission Set Overview > Object Settings ▾ **Fuel details** ▾

**Fuel details** Save Cancel

**Tab Settings**

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/> <span style="border: 1px solid blue; padding: 2px;">i</span>

**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"/> abd c	ac	ab@cd1.com	Sales executive	<input checked="" type="checkbox"/>	sales executive
<input type="checkbox"/> Astro Nomical	anomi	astronomicalsecurity.2vhahccacrdajuzh67mibr0rqsab1dhzd@smart.com	<input type="checkbox"/>	<input type="checkbox"/>	Force.com - Free User
<input type="checkbox"/> Brochan Pane	bpane	bpane.kh061622.nvopq5ltd9yi.cwkqyhudbsxb@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

### 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 a 'Sharing Settings' link, which is highlighted with a red arrow. The main content 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'. The 'Edit' button in the top right of the table is also highlighted with a red arrow. The table rows include Lead, Account and Contract, Contact, Order, and Asset.

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

This screenshot shows the 'Sharing Settings' page in edit mode. It displays a grid of objects and their current sharing settings. The 'Gas Station' and 'Supplier' objects are highlighted with red boxes around their respective 'Default Internal Access' dropdown menus, which are set to 'Public Read Only'. The 'Save' button at the bottom of the page is also highlighted with a red box.

3. Click save.
4. Extra information, By these every profile has their own access, according to their

profile.

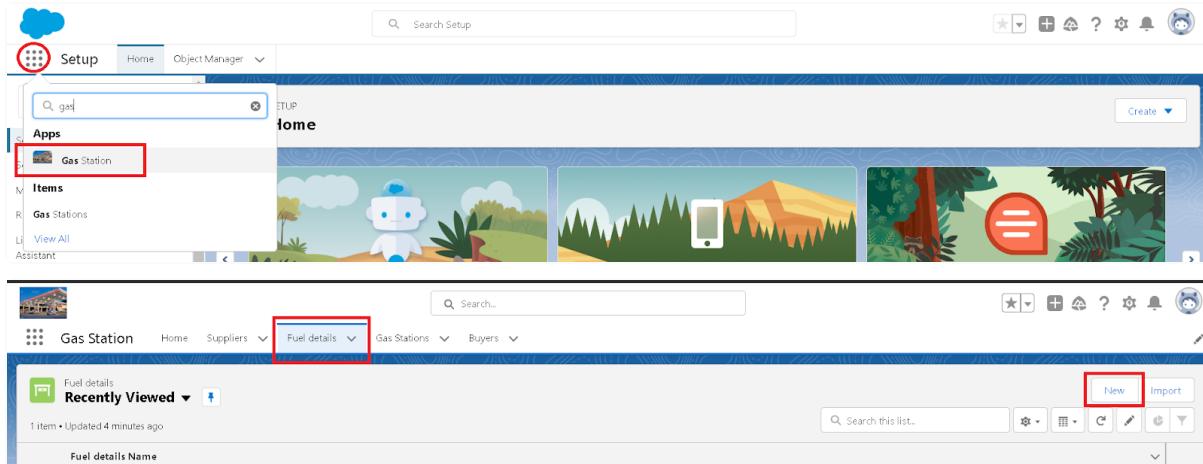
5. But in our case we created a roles and given the roles in such a way that manager can see sales executive and sales person records , sales executive can see the sales person records.

## 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...

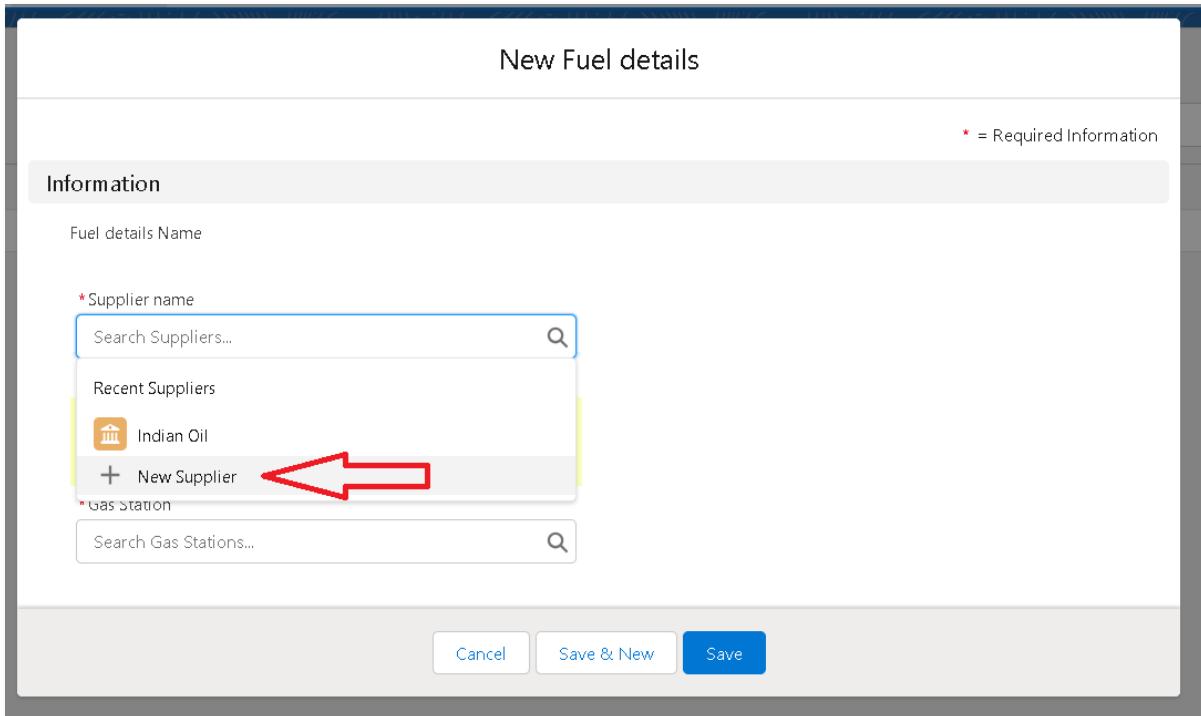
Recent Suppliers

Indian Oil 

+ New Supplier 

\*Gas Station

Search Gas Stations...



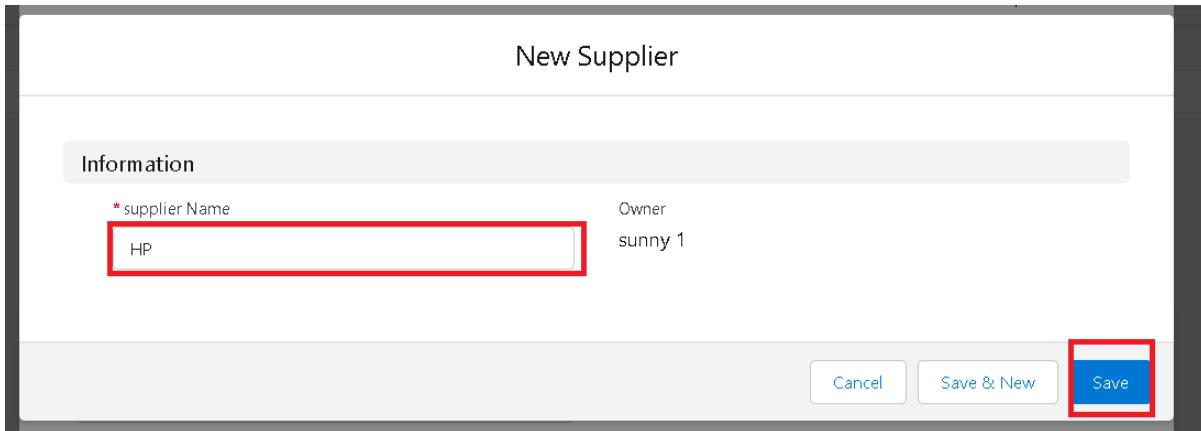
6. Fill the details in supplier record and click on save.

New Supplier

**Information**

\*supplier Name  

Owner sunny 1



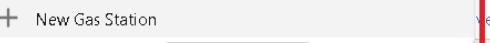
7. Creating the Gas station record in fuel details record, by clicking on new gas station.

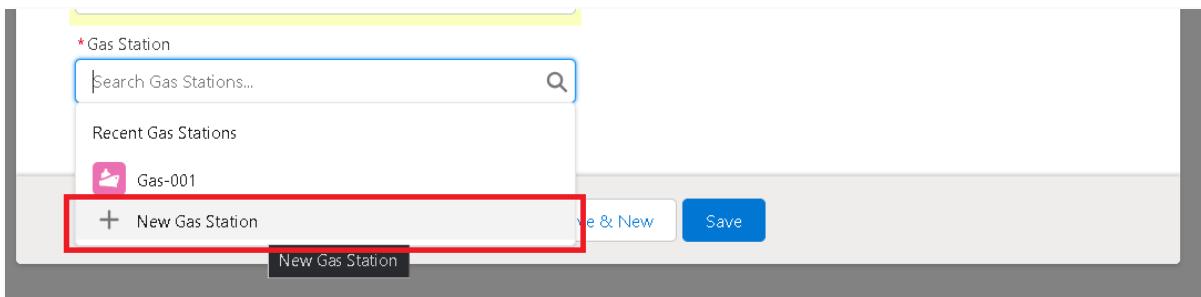
\*Gas Station

Search Gas Stations...

Recent Gas Stations

Gas-001 

+ New Gas Station 



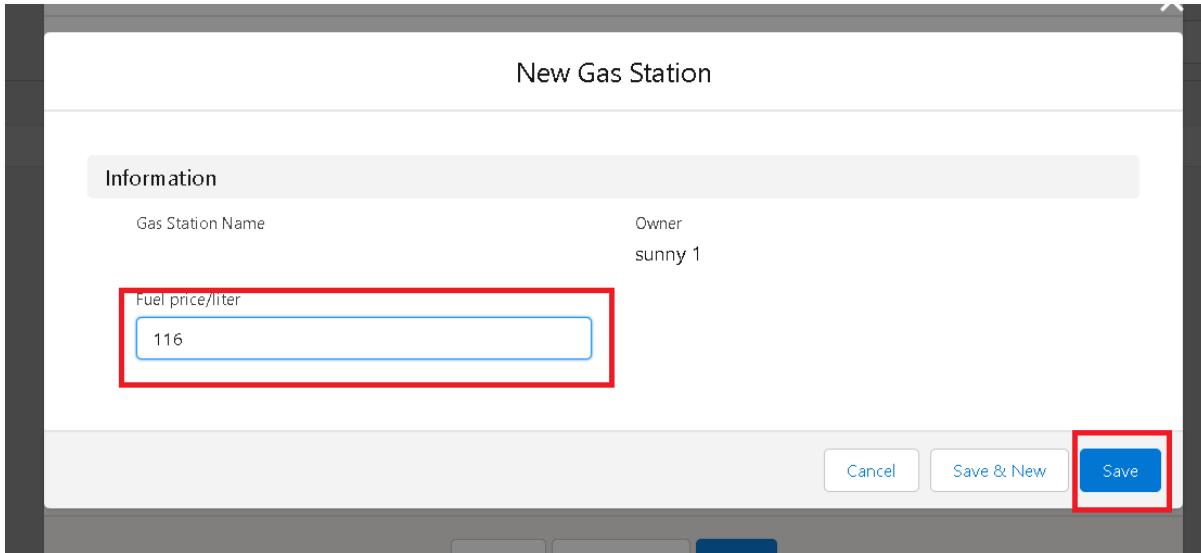
8. Fill the details in gas station record, Click save.

New Gas Station

Information

Gas Station Name	Owner
	sunny 1
Fuel price/liter	
116	

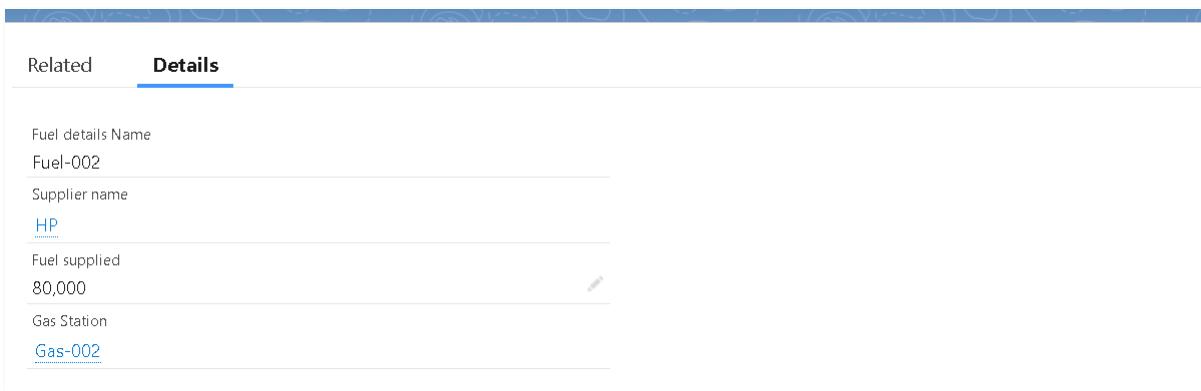
Cancel Save & New **Save**



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

Related **Details**

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

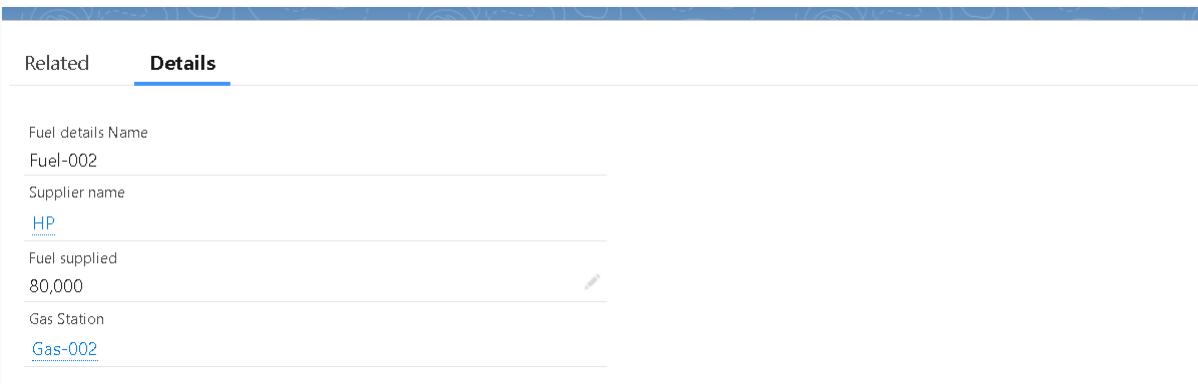
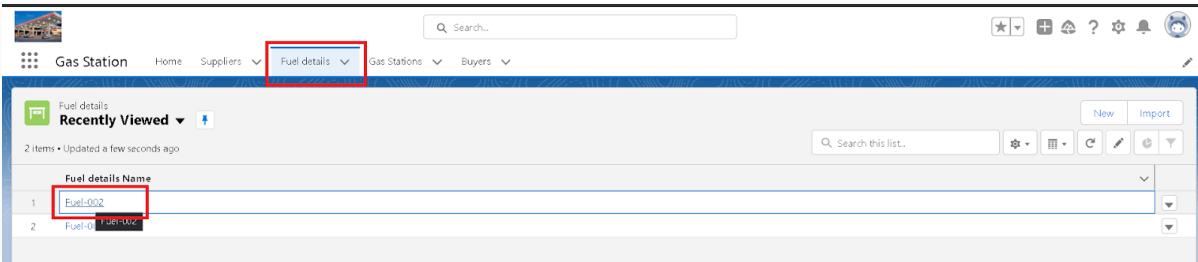
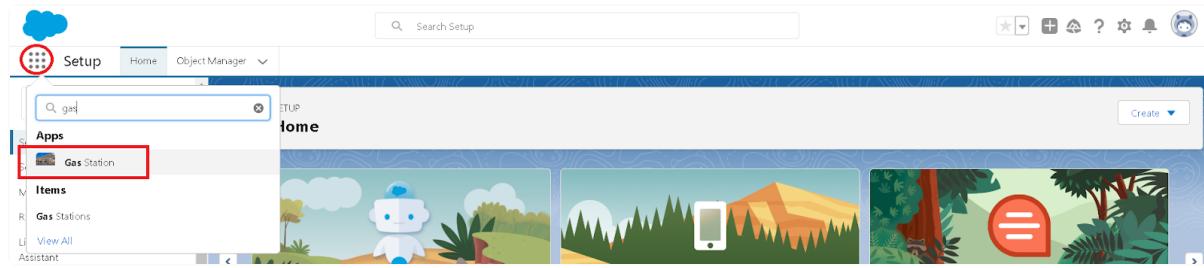


10.Followed by these create 10 more records in Buyer object.

## View a record

To create a record in junction object follow these steps

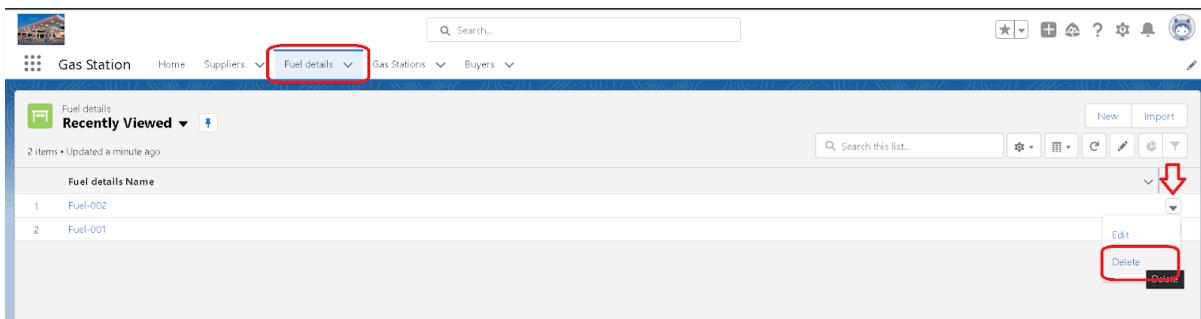
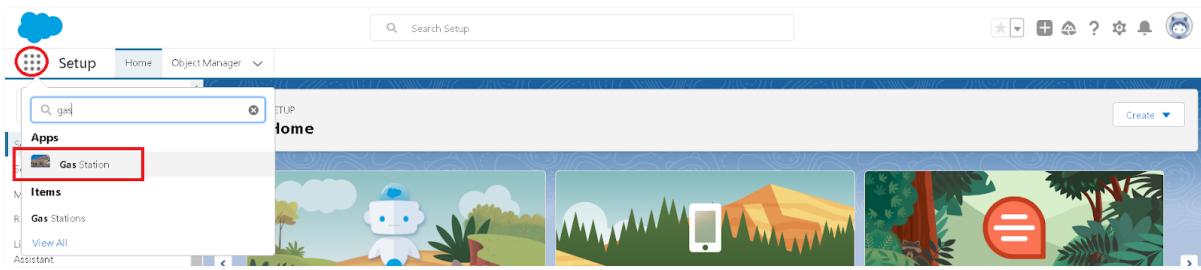
1. Click on the app launcher locate at left side of the screen.
2. Search for “ Gas station” and click on it.
3. Click on “ fuel details tab”.
4. Click on the records that are already created.



## 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

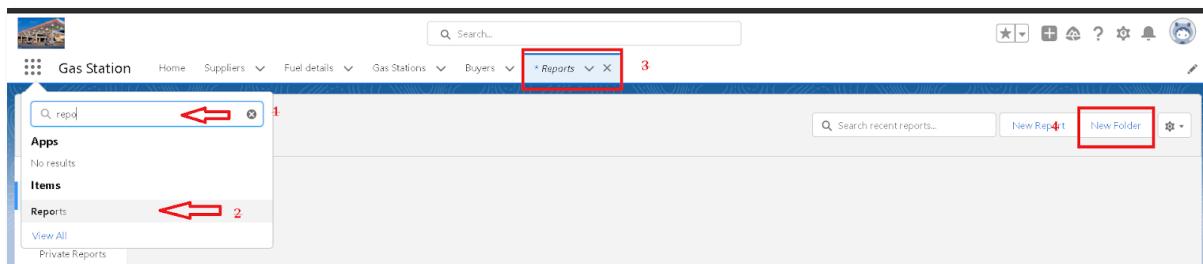
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

### Types of Reports in Salesforce

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

### 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.

Create folder

\* Folder Label

\* Folder Unique Name

[Cancel](#) [Save](#)

## 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.

Gas Station Home Suppliers Fuel details Gas Stations Buyers \* Reports

Reports All Folders 5 items

REPORTS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	Einstein Bot Reports	Automated Process	16/5/2023, 8:59 am	Automated Process	16/5/2023, 8:59 am
Created by Me	Einstein Bot Reports Summer '23	Automated Process	11/6/2023, 6:08 am	Automated Process	11/6/2023, 6:08 am
Private Reports	Einstein Bot Reports Summer '22	Automated Process	16/5/2023, 8:59 am	Automated Process	16/5/2023, 8:59 am
Public Reports	Einstein Bot Reports Winter '23	Automated Process	16/5/2023, 8:59 am	Automated Process	16/5/2023, 8:59 am
All Reports	Fuel Estimation	sunny1	15/6/2023, 10:22 am	sunny1	15/6/2023, 10:22 am

FOLDERS

All Folders 2

Created by Me

Shared with Me

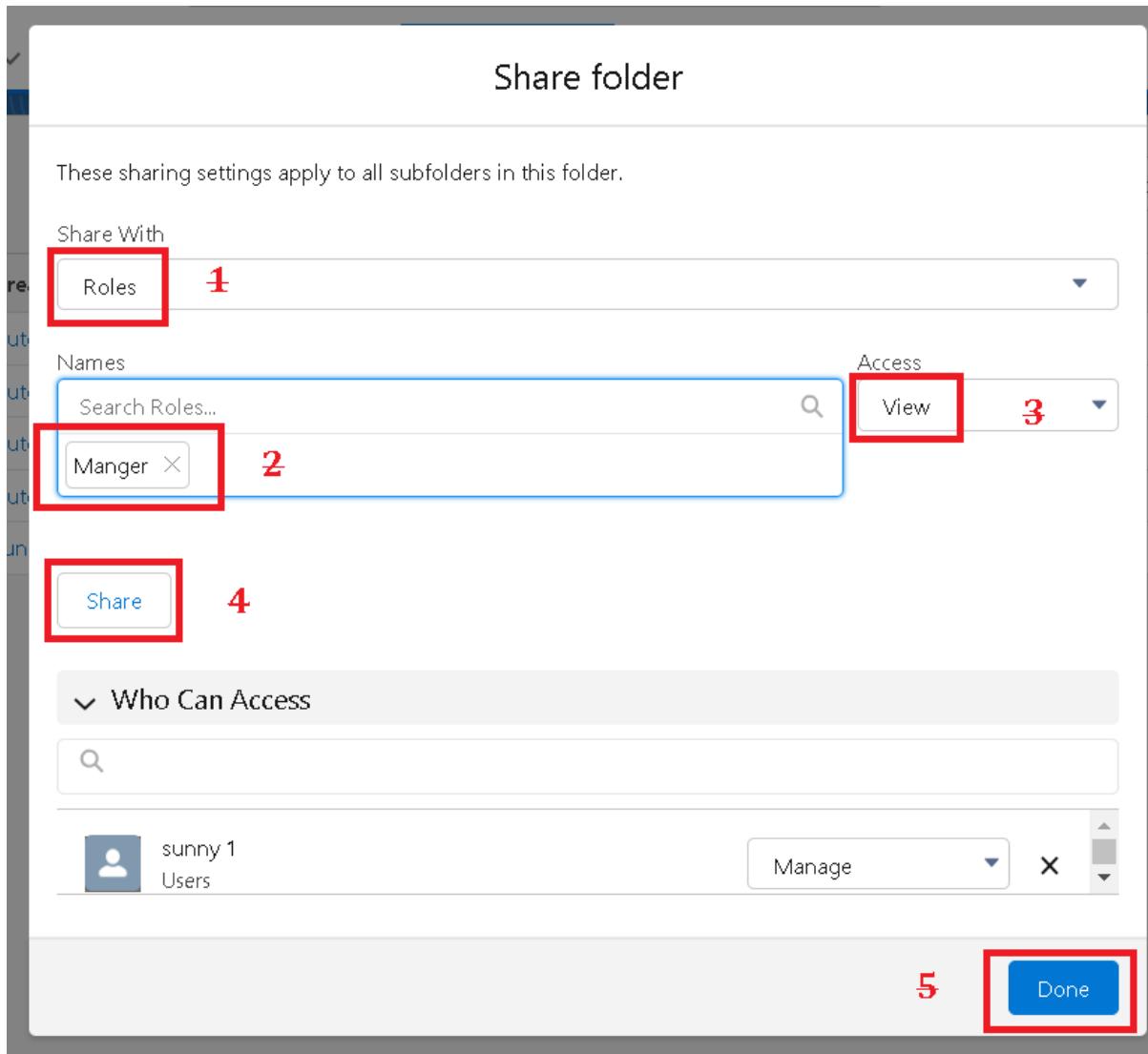
FAVORITES

All Favorites

3

4 Share

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



## 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 Microsoft Dynamics 365 interface. At the top, there's a navigation bar with links like Home, Employees, Assets, Asset Services, Projects, Project Tasks, Reports (which is highlighted with a red box), and Dashboards. Below this is a sidebar with 'Reports' and 'Recent' sections, followed by categories: Created by Me, Private Reports, Public Reports, and All Reports. The main area is a table listing reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. Two reports are listed: 'Employee's working on projects report' and 'Assets assigned to Employees'.

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. The main area is titled 'Select a Report Type' and contains a search bar with 'gas' typed into it. Below the search bar is a list of report types with columns for 'Report Type Name' and 'Category'. One report type, 'Gas Stations with Buyers', is highlighted with a red box. To the right, the 'Details' pane shows the selected report type ('Gas Stations with Buyers', Standard Report Type) and a 'Start Report' button, which is also highlighted with a red box. The pane also includes sections for 'Created By You' (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 Previewing a limited number of records. Run the report to see everything.

Groups

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

GROUP COLUMNS

- Add group...

Columns

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

Fuel Available in bunk 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	₹21,072.00
<b>Total (7)</b>		2,282	₹21,072.00

Row Counts  Detail Rows  Subtotals  Grand Total

Update Preview Automatically

3

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

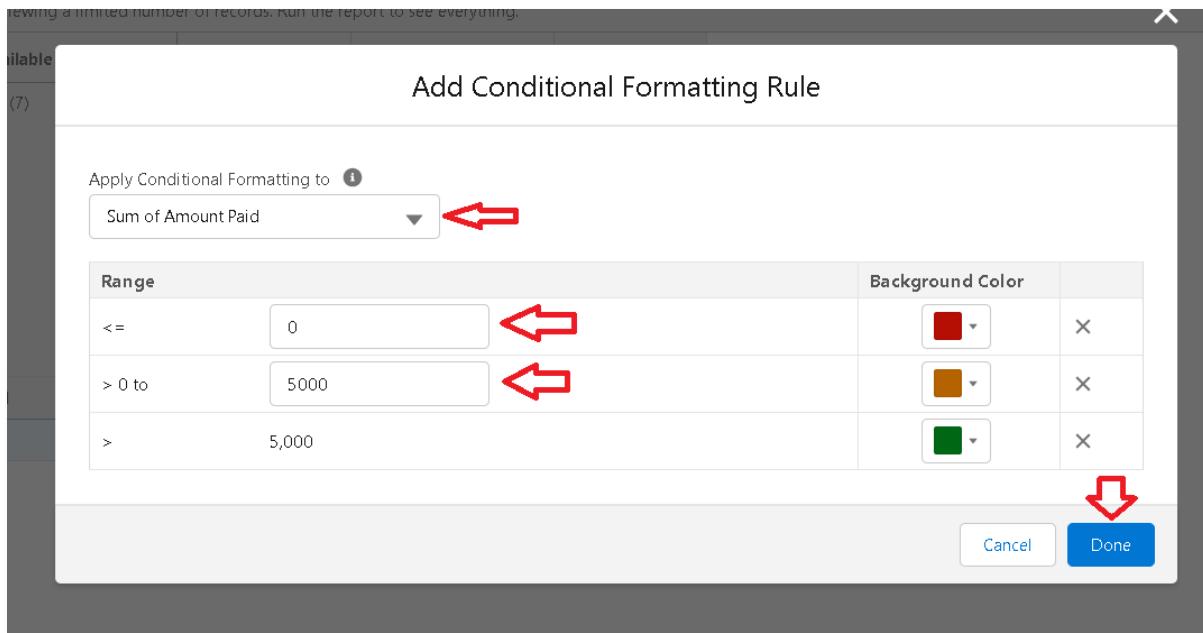
Conditional Formatting Rules



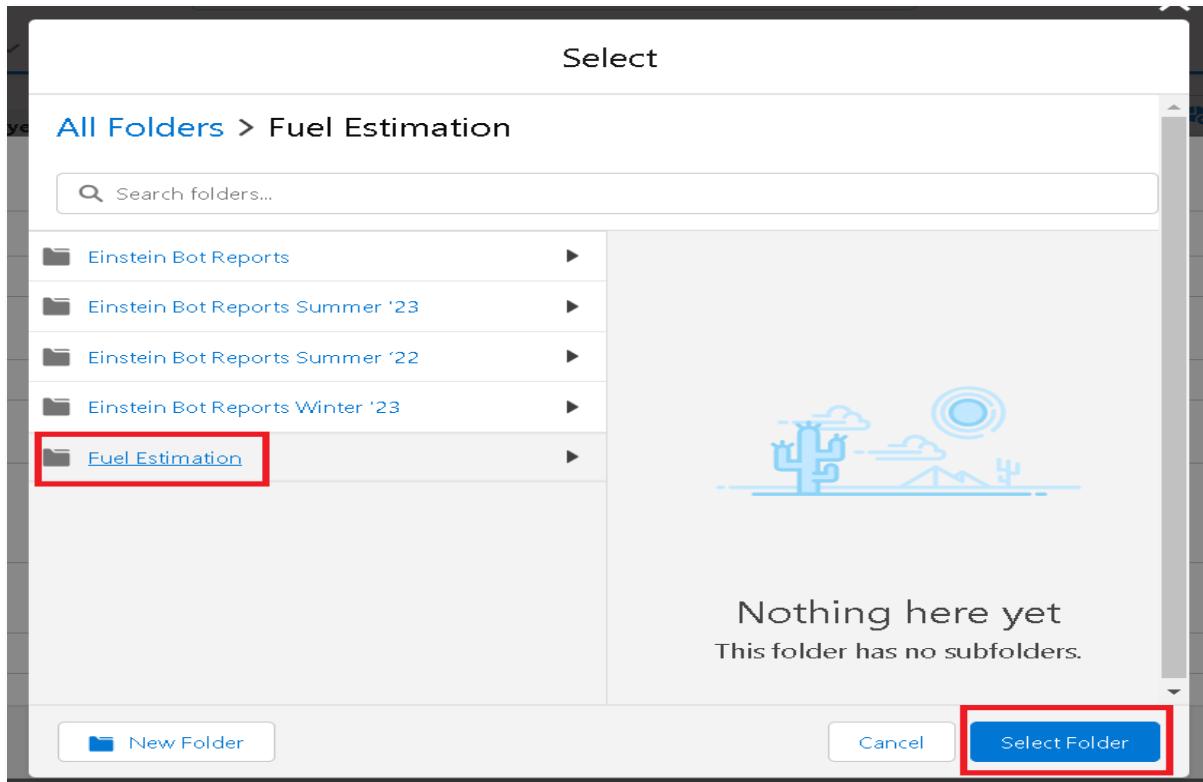
No Conditional Formatting Rules Created

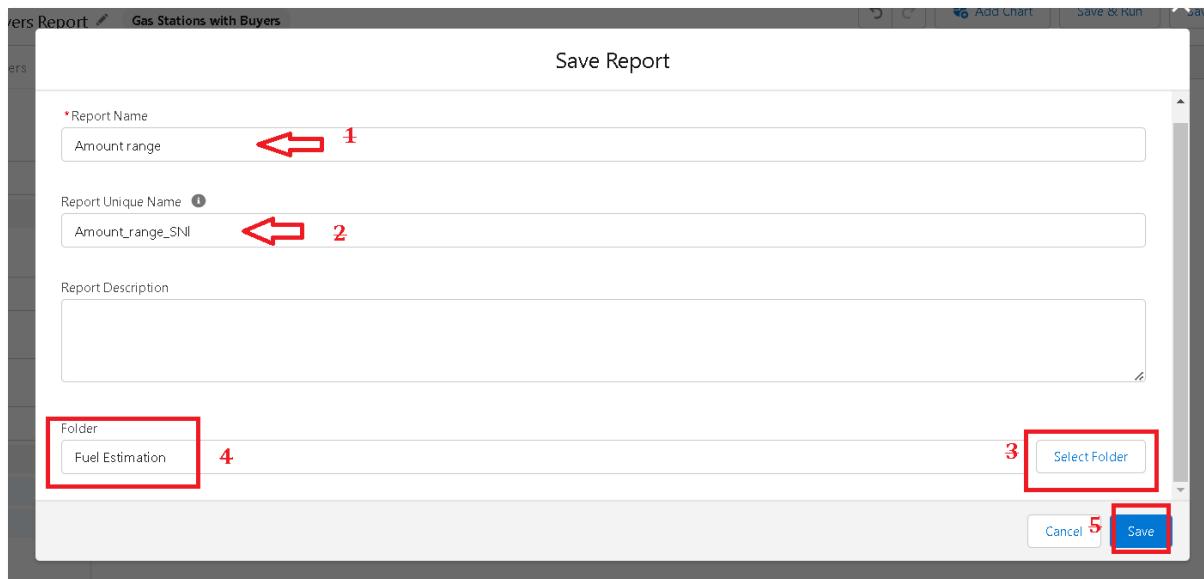
**Add Conditional Formatting Rule**

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

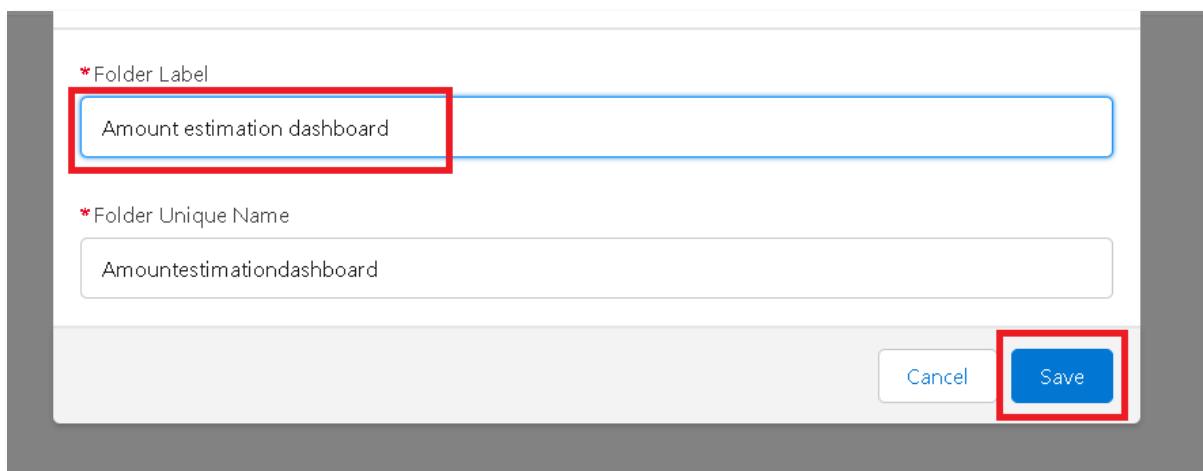
Row Counts Detail Rows Subtotals Grand Total

## **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.

### **Create Dashboard Folder**

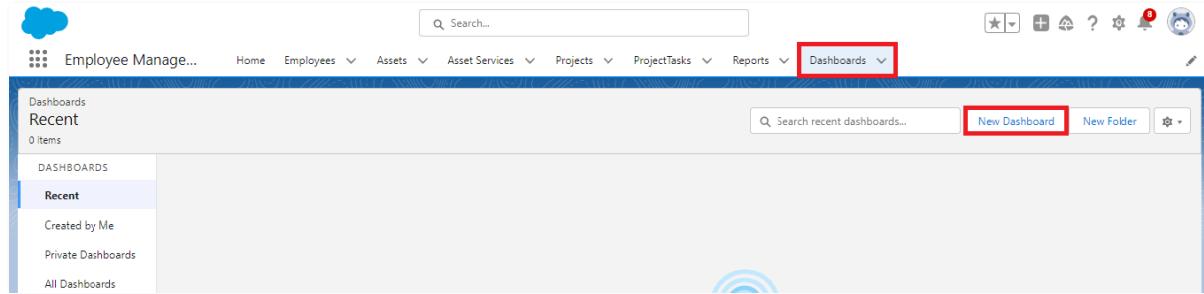
1. Click on the app launcher and search for dashboard.
2. Click on dashboard tab.
3. Click new folder, give the folder label as “ Amount estimation dashboard”.
4. Folder unique name will be auto populated.
5. Click save.



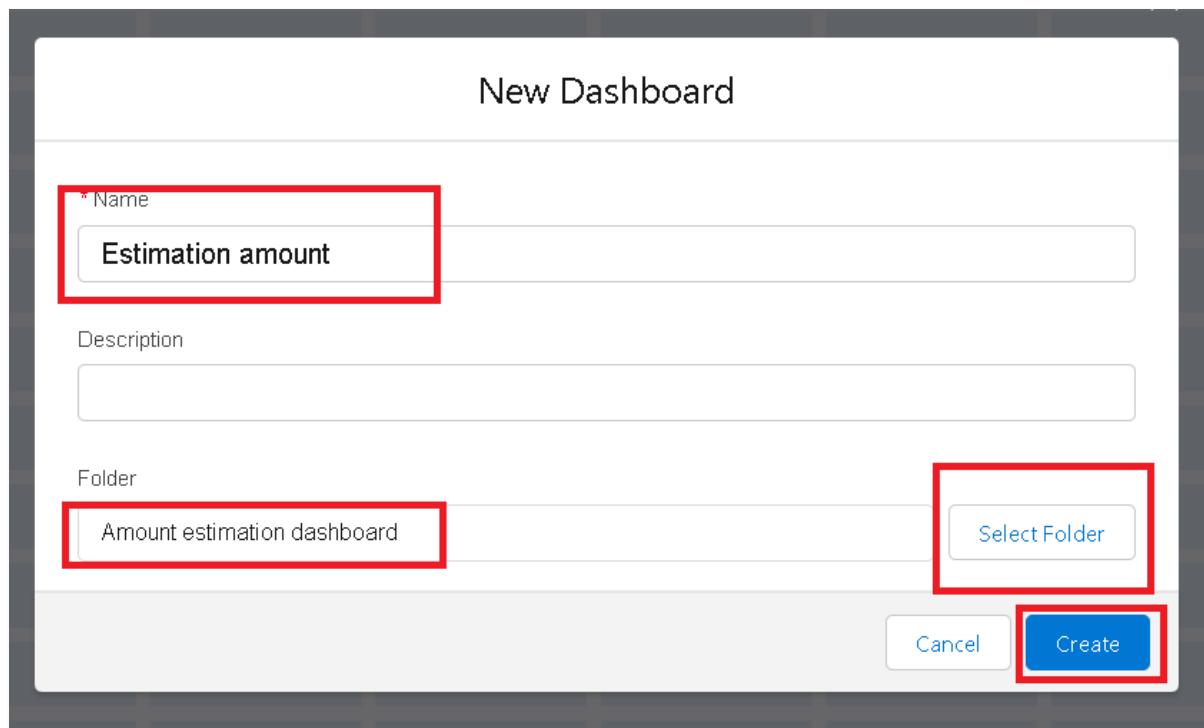
6. Follow the same steps, from milestone 12, and activity 2, and provide the sharing settings for the folder that just created.

## Create Dashboard

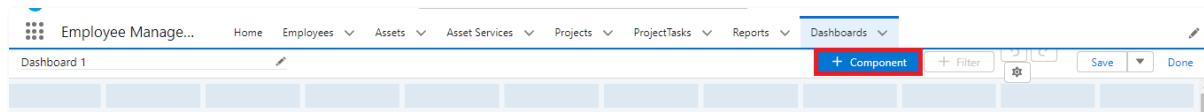
1. Go to the app ? click on the Dashboards tabs.



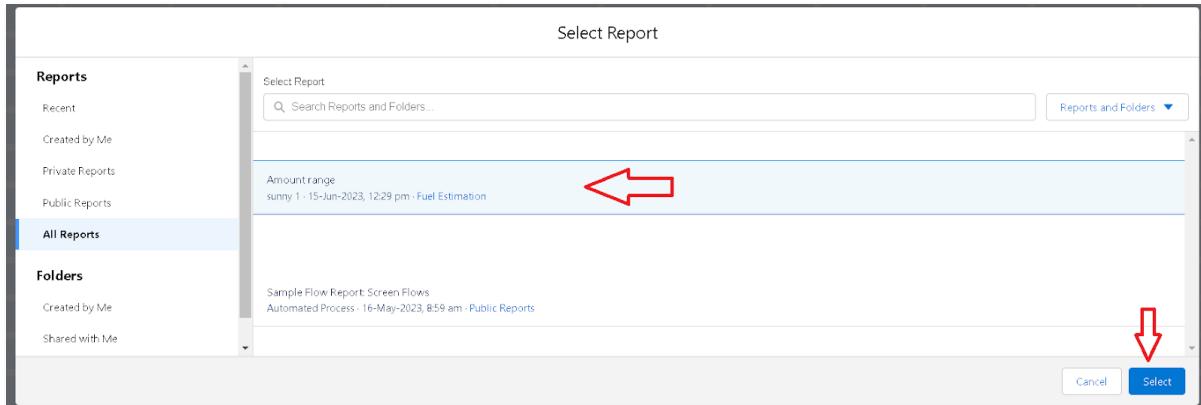
2. Give a Name and select the folder that created, and click on create.



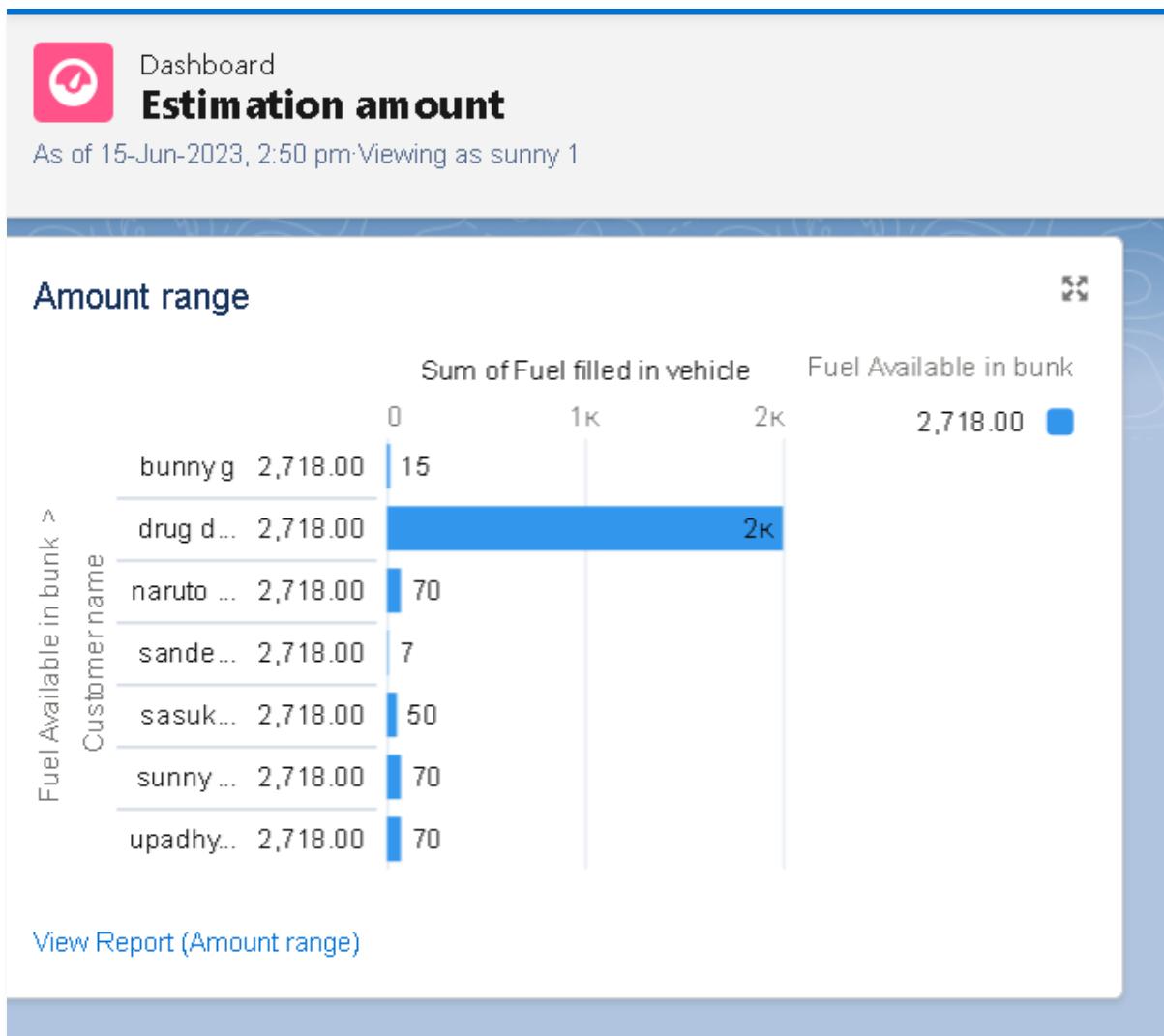
3. Select add component.



4. Select a Report and click on select.



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

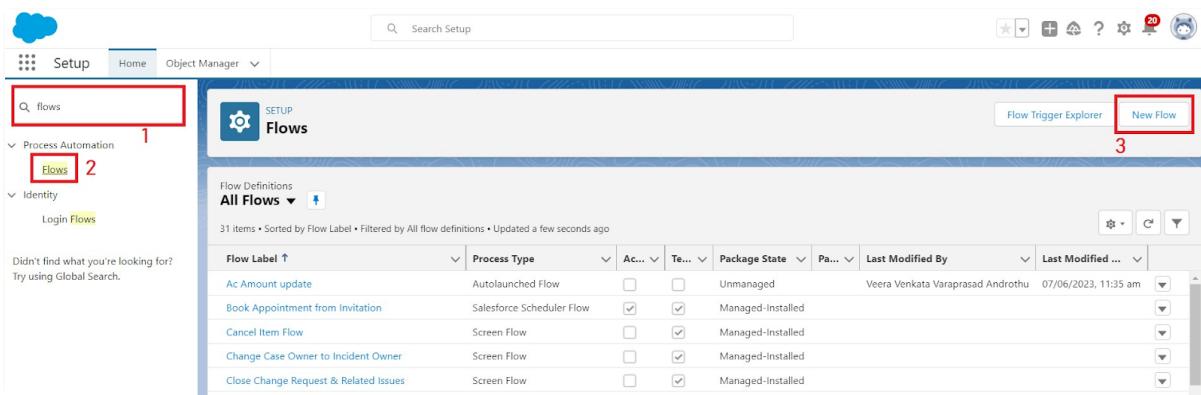


## 15.Flows

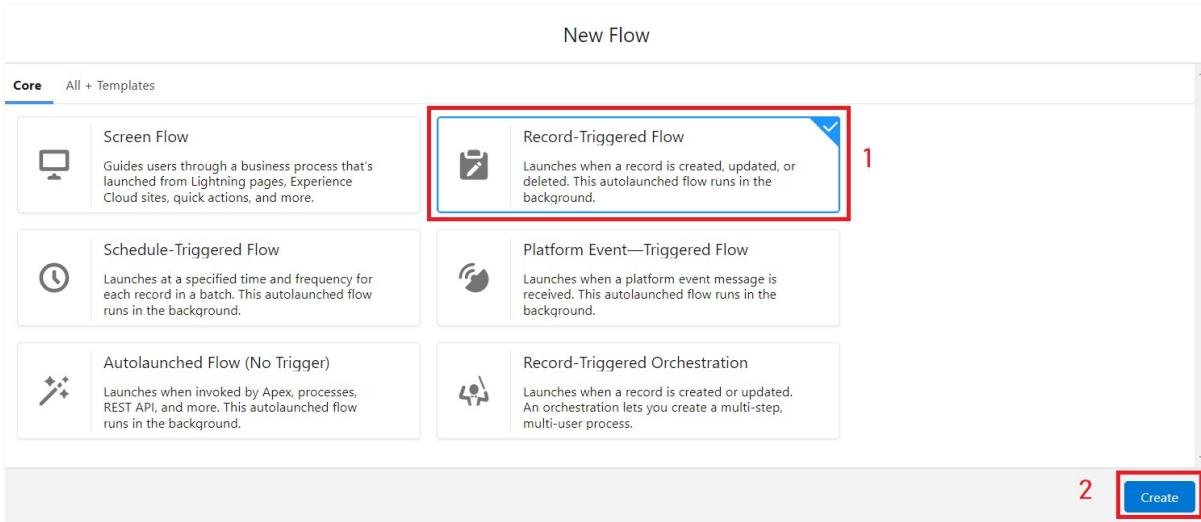
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

### Create a Flow

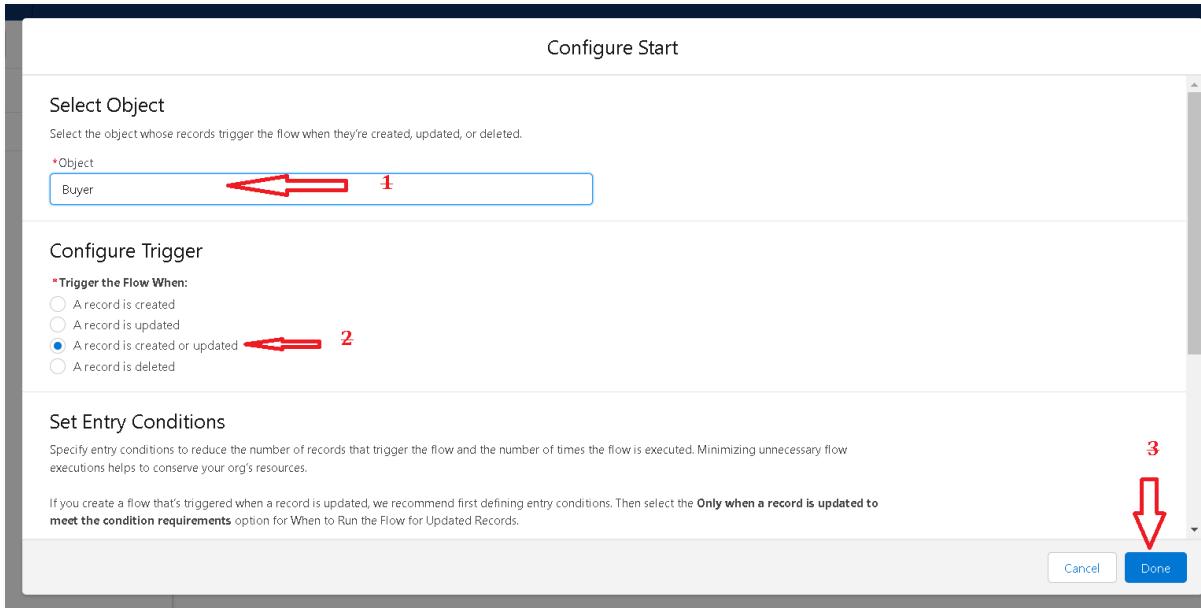
1. Go to setup ? type Flow in quick find box ? Click on the Flow and Select the New Flow.



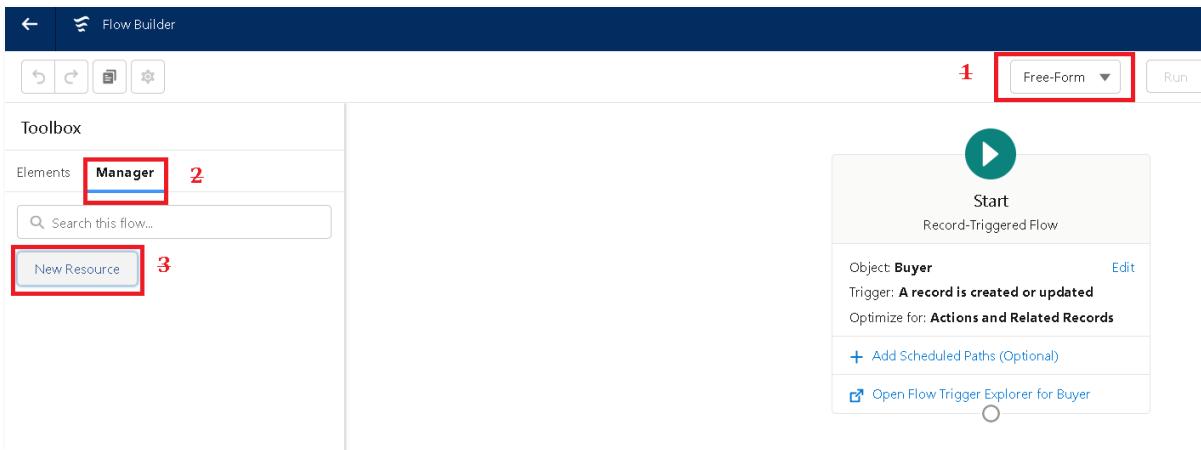
2. Select the Record-triggered flow and Click on Create.

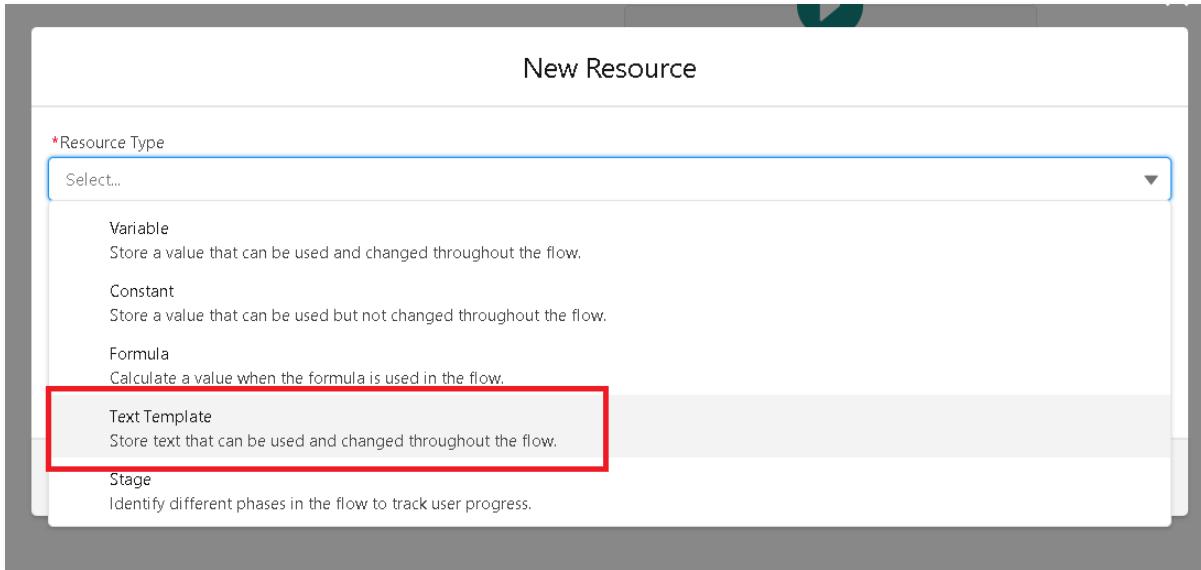


3. Select the Object as a “buyer” in the Drop down list.
4. Select the Trigger Flow when: “A record is Created or Updated”.
5. Select the Optimize the flow for: “Actions and Related Records” and Click on Done.



6. Now change the mode 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}

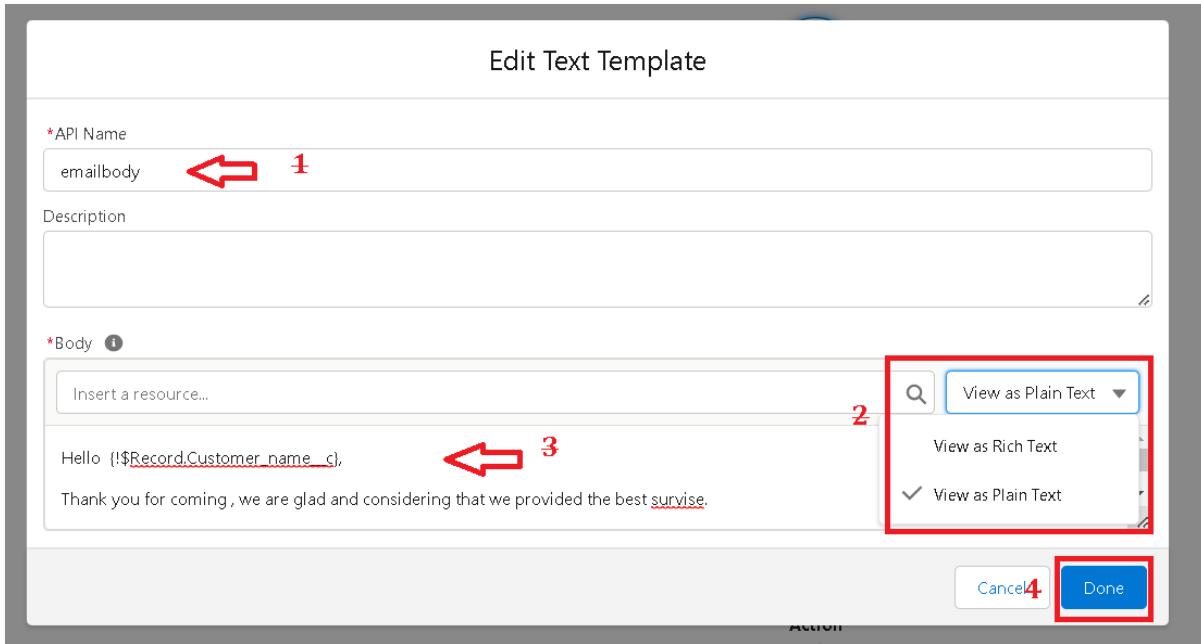
Amount paid by Customer : {!\$Record.Amount\_Paid\_c}

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

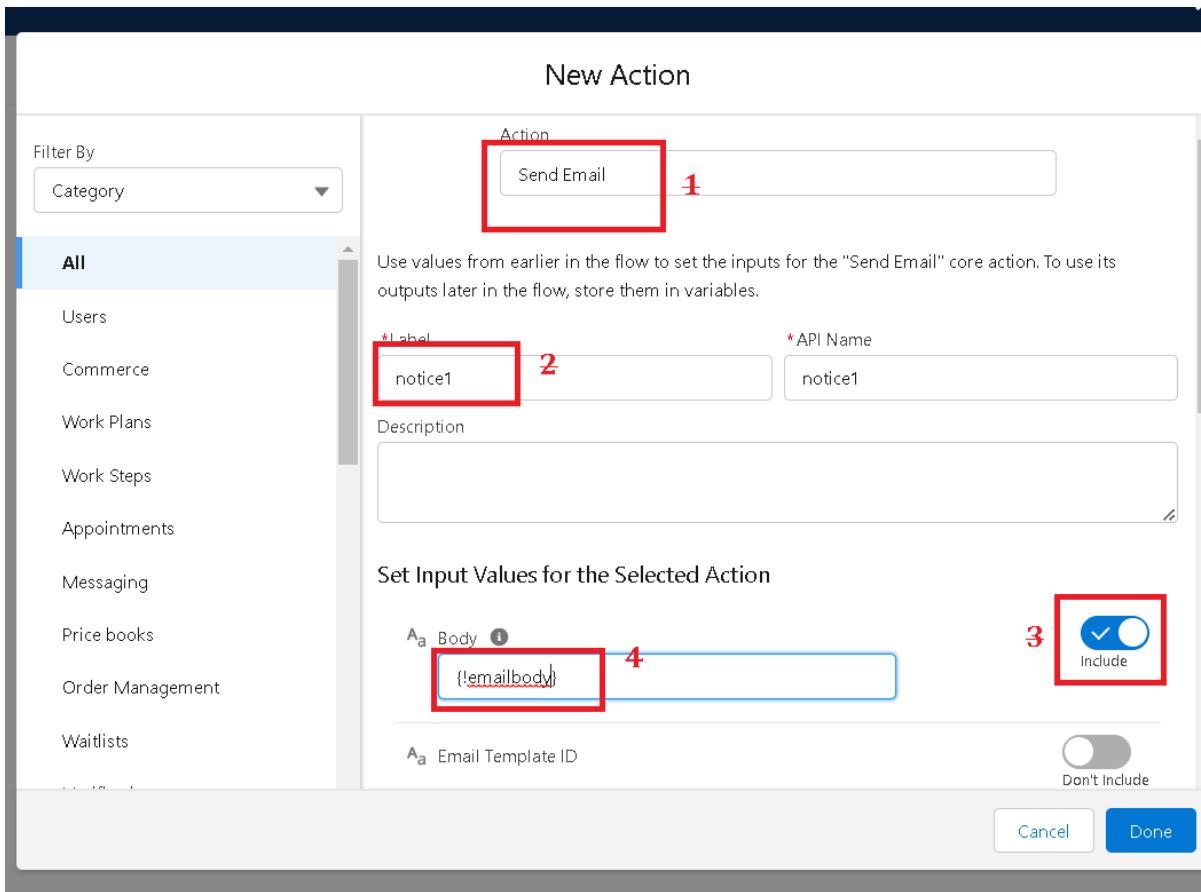
Fuel intake in vehicle : {!\$Record.Fuel\_filled\_in\_vehicle\_c}

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

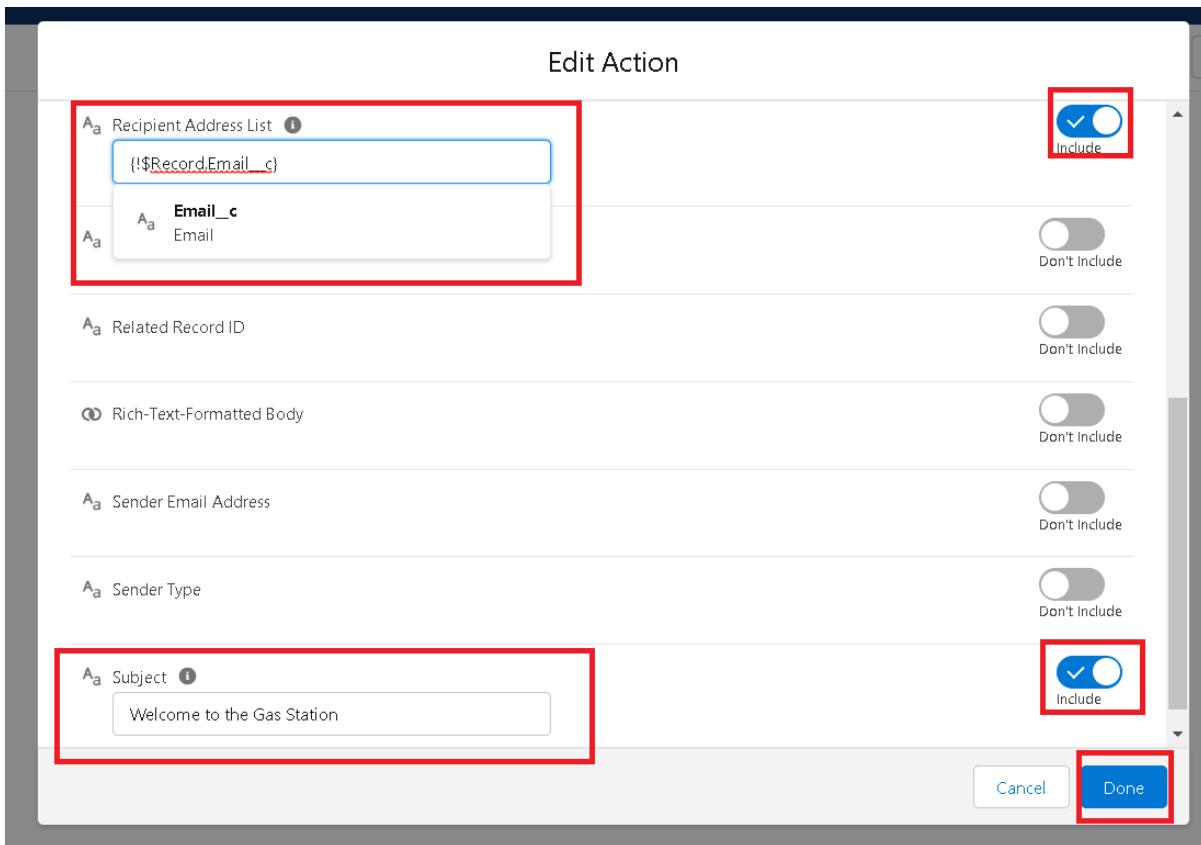
12. Click done.



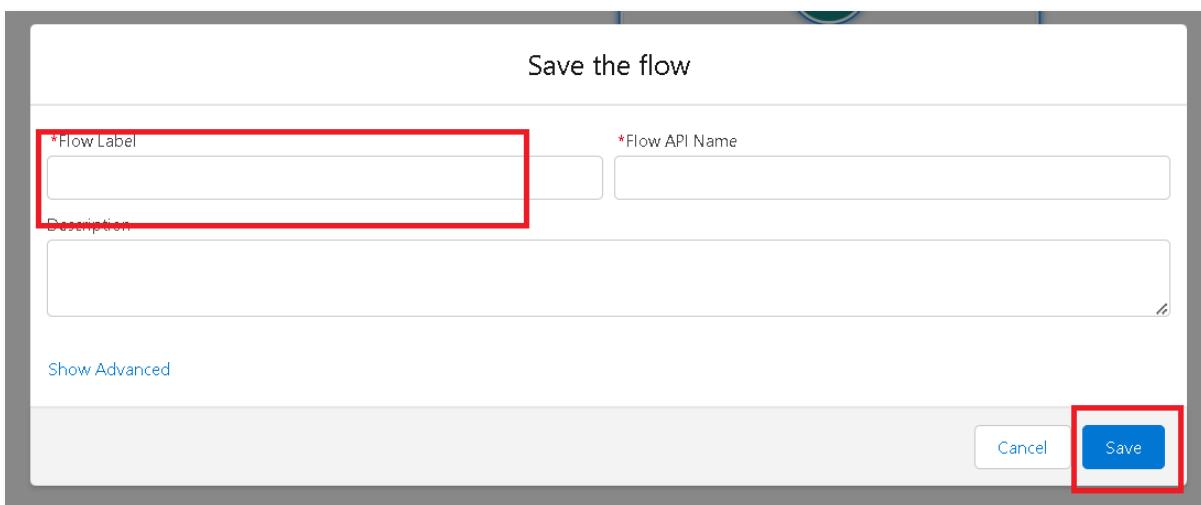
13. Now click on elements, and drag the action element into the preview pane.
14. Their action bar will be opened in that search for “ send email ” and click on it.
15. Give the label name as “ notice”
16. API name will be auto populated.
17. Enable the body in set input values for the selected action.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

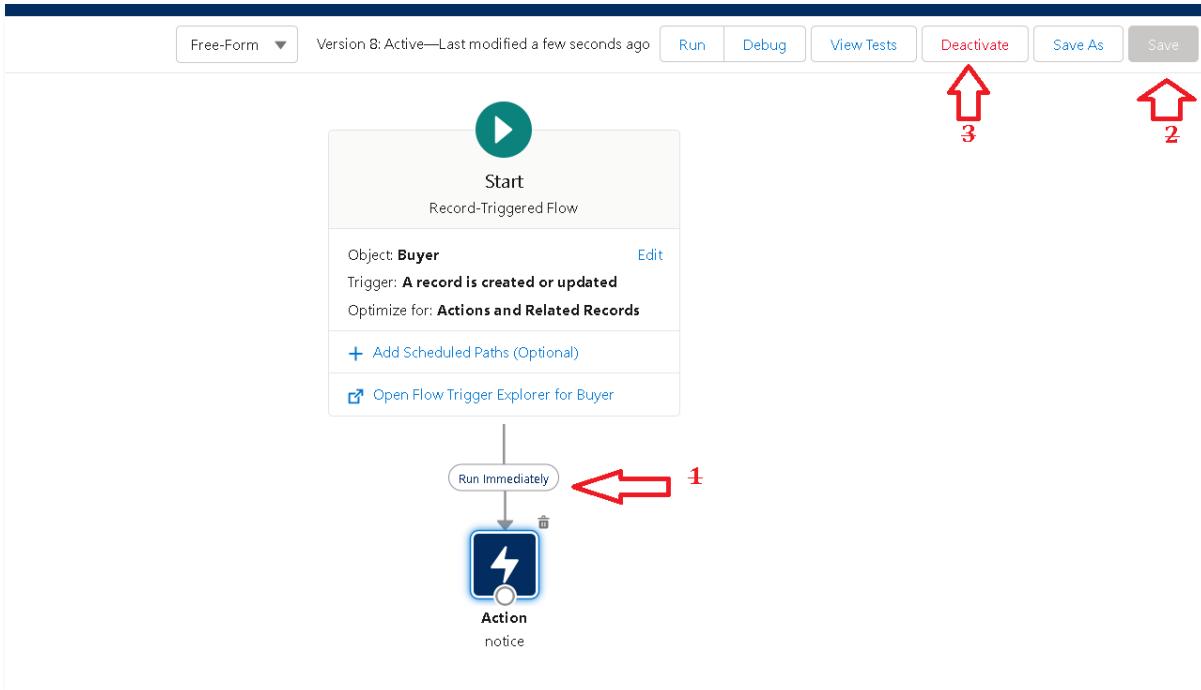


19. Include recipient address list select the email form the record.
20. Include subject as “ welcome to gas station”.
21. Click done.



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.





THANK YOU