

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. By leveraging the power of customer relationship management (CRM), the application aims to enhance customer experiences, optimize store operations, and improve overall efficiency in the gas filling industry.

The application offers a range of features, including customer management, inventory management, sales and transactions, analytics and reporting, and employee management. Customer management features allow for the creation of detailed customer profiles, personalized communications, and effective loyalty programs. Inventory management tools enable real-time tracking of gas types and quantities, stock alerts, and supplier management. The sales and transactions module provides a user-friendly point-of-sale system, detailed sales reports, and flexible pricing management. Analytics and reporting features offer in-depth analysis of customer behavior, sales performance, and inventory trends, providing valuable insights for decision-making. Additionally, the application includes employee management tools for user roles and permissions, task management, and performance tracking.

By implementing this CRM solution, gas filling store owners can benefit from improved customer satisfaction, optimized operations, data-driven decision making, increased efficiency, and enhanced competitiveness. The application's user-friendly interface and powerful features make it a valuable tool for gas filling stores seeking to streamline their processes and improve their overall performance.

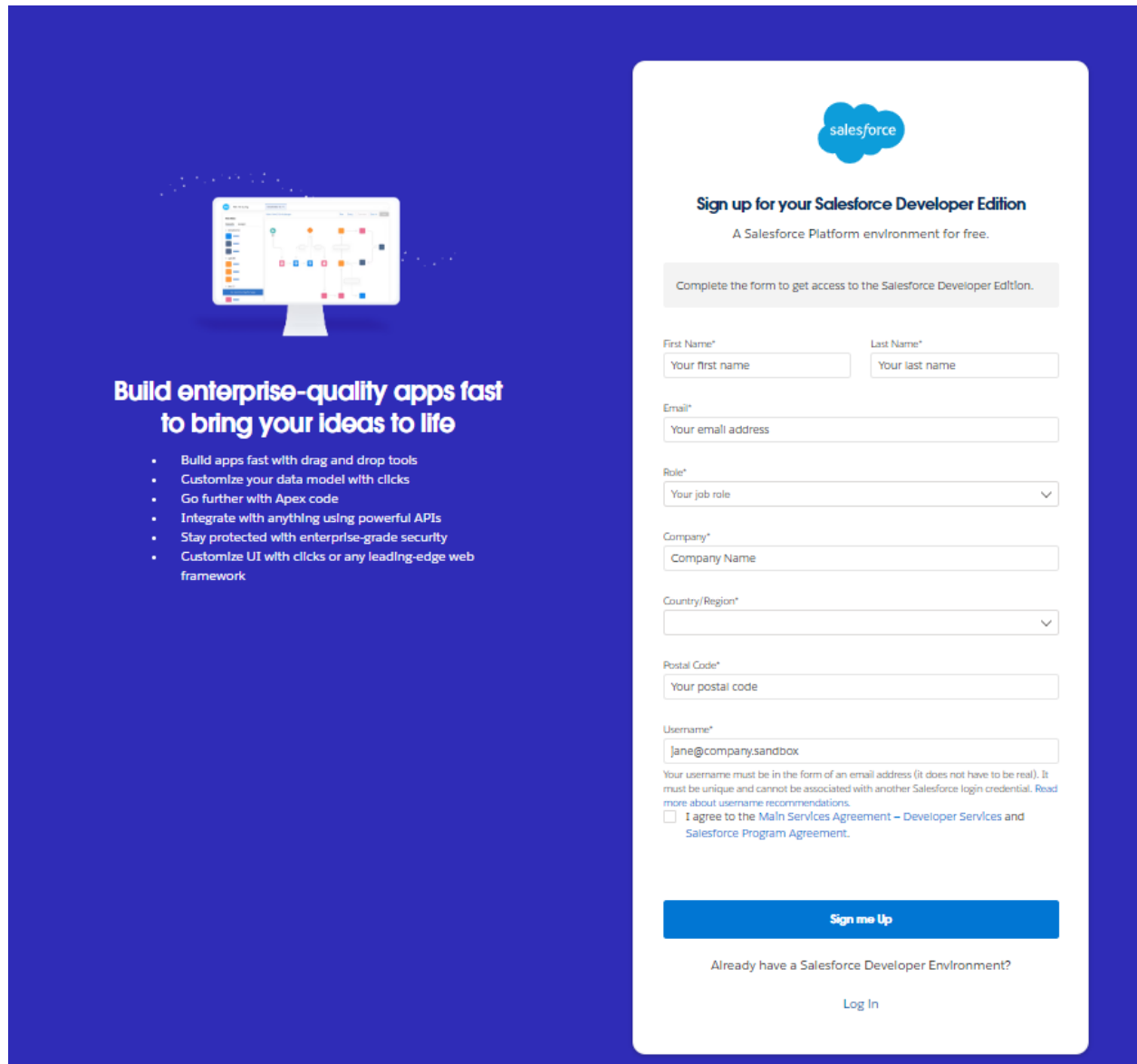
INDEX PAGE

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SALESFORCE:

Creating a developer org in salesforce.

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



The image shows the Salesforce Developer Edition sign-up page. On the left, there is a blue background with a white monitor displaying a Salesforce interface. Below the monitor, the text reads: "Build enterprise-quality apps fast to bring your ideas to life". A bulleted list follows: "• Build apps fast with drag and drop tools", "• Customize your data model with clicks", "• Go further with Apex code", "• Integrate with anything using powerful APIs", "• Stay protected with enterprise-grade security", and "• Customize UI with clicks or any leading-edge web framework". On the right, there is a white sign-up form with the Salesforce logo at the top. The heading is "Sign up for your Salesforce Developer Edition" with the subtext "A Salesforce Platform environment for free." Below this is a grey box with the text "Complete the form to get access to the Salesforce Developer Edition." The form fields include: "First Name*" (placeholder: "Your first name"), "Last Name*" (placeholder: "Your last name"), "Email*" (placeholder: "Your email address"), "Role*" (dropdown menu with "Your job role" selected), "Company*" (placeholder: "Company Name"), "Country/Region*" (dropdown menu), "Postal Code*" (placeholder: "Your postal code"), and "Username*" (placeholder: "jane@company.sandbox"). Below the username field, there is a note: "Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. Read more about username recommendations." At the bottom of the form, there is a checkbox labeled "I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement." and a blue "Sign me Up" button. Below the button, there is a link: "Already have a Salesforce Developer Environment? Log In".

Build enterprise-quality apps fast to bring your ideas to life

- 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

Sign up for your Salesforce Developer Edition
A Salesforce Platform environment for free.

Complete the form to get access to the Salesforce Developer Edition.

First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

Country/Region*
Country/Region

Postal Code*
Your postal code

Username*
jane@company.sandbox

Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)

☐ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement.

Sign me Up

Already have a Salesforce Developer Environment?
[Log In](#)

3.After verification through mail.

4.you will redirect to your salesforce setup page.

OBJECT:

Create Supplier Object

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

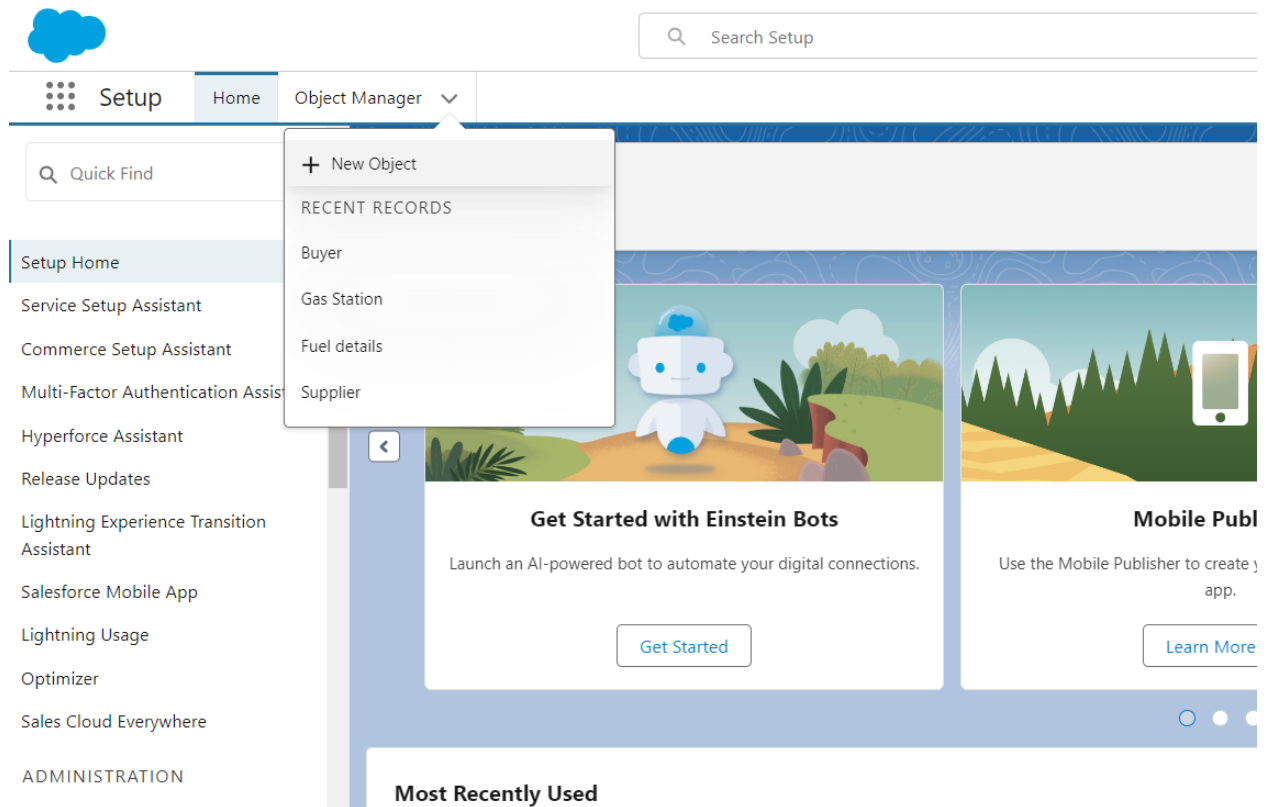
Create Gas Station Object

1. To create an object:
2. From the setup page ? Click on Object Manager ? Click on Create ? Click on Custom Object.
3. Enter the label name? Gas Station
4. Plural label name? Gas Stations
5. Enter Record Name Label and Format
6. Record Name ? Gas Station
7. Data Type ? Auto Number
8. Display Format ? Gas-{000}
9. Starting number ? 1
10. Click on Allow reports and Track Field History,
11. Allow search ? Save.

Create Buyer and Fuel Details Object

1. Use these display format for the Buyer
2. label name ? Buyer
3. Plural label name ? Buyers
4. Display Format ? Buyer-{000}
5. Starting number ? 1

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



TABS:

TYPES OF TABS

1. Custom Tabs
2. Web Tabs
3. Visual force Tabs
4. Lightning Component Tabs
5. Lightning Page Tabs

Creating a Custom Tab

1. Go to setup page ? type Tabs in Quick Find bar ? click on tabs ? New (under custom object tab)
2. Select Object(Supplier) ? Select the tab style ? Next (Add to profiles page) keep it as default ? Next (Add to Custom App) uncheck the include tab .
3. Make sure that Append tab to users' existing personal customizations is checked.
4. Click save.

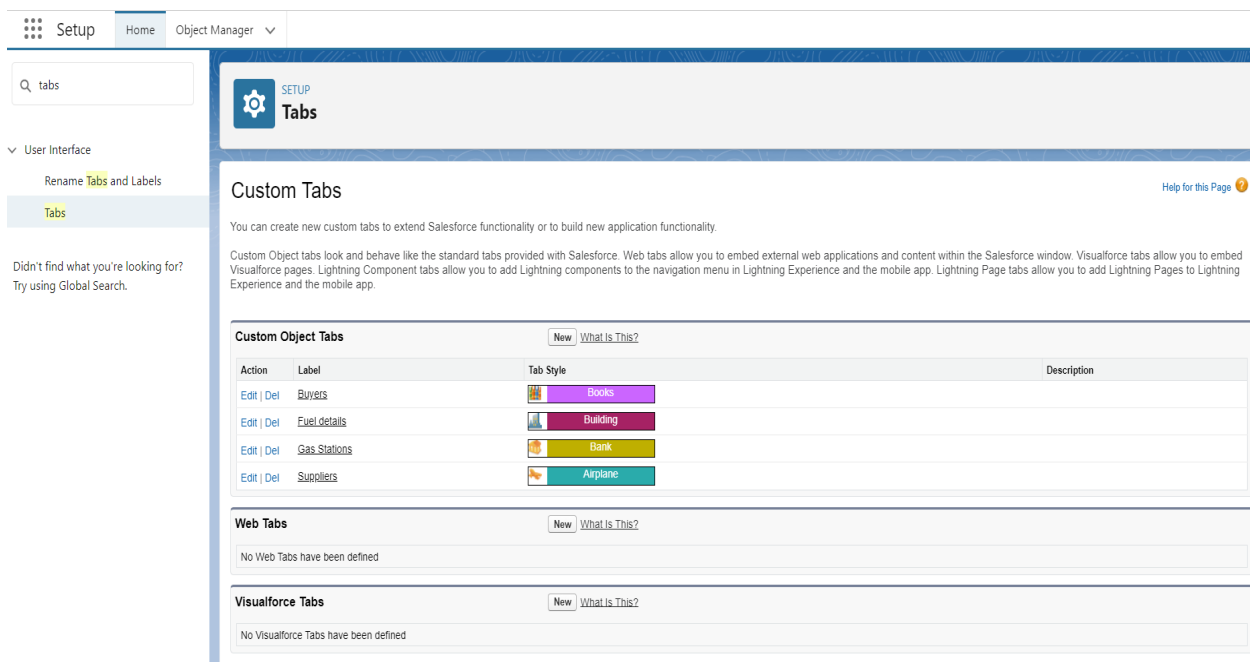
The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'tabs' entered. Under 'User Interface', 'Rename Tabs and Labels' is selected, and 'Tabs' is highlighted. The main content area is titled 'Edit Custom Object Tab Suppliers'. Below the title, it says 'Fill in the fields below to define the custom tab.' The 'Custom Tab Definition Edit' section contains a table for 'Custom Object Tab Information' with the following details:

Tab Label	Suppliers
Object	Supplier
Tab Style	Airplane

Below the table, there is an optional field for 'Home Page Custom Link to show as a splash page the first time your users click on this tab.' The 'Splash Page Custom Link' is set to '--None--'. There is also a 'Description' field with a text area for entering a short description. At the bottom right, there are 'Save' and 'Cancel' buttons.

Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “ Gas station, Buyer, Fuel details”.
2. By using the above same process create the remaining tabs



The Lightning App:

Create a Lightning App

1. Go to setup page ? search “app manager” in quick find ? select “app manager” ? click on New lightning App.
2. Fill the app name in app details as GAS STATION ?Next ? (App option page) keep it as default ? Next ? (Utility Items) keep it as default ? Nex
3. To Add Navigation Items:
4. To Add User Profiles:
5. Search profiles (System administrator) in the search bar ? click on the arrow button ? save & finish.

The screenshot displays the Salesforce Lightning App Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains 'Search Setup'. The left sidebar shows a search for 'app mana' and a list of apps, with 'App Manager' selected. The main content area is titled 'Lightning Experience App Manager' and shows a table of 23 items. The table columns are App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. The 'GAS STATION' app is highlighted in the table. Below the table, the 'App Settings' section is visible, showing the 'App Details & Branding' configuration. The 'App Details' section includes fields for App Name (GAS STATION), Developer Name (GAS_STATION), and Description (Enter a description...). The 'App Branding' section includes an image upload button and a Primary Color Hex Value (#0070D2). The 'App Launcher Preview' section shows a preview of the app's navigation bar with the 'GS' logo and the text 'GAS STATION'.

App Name	Developer Name	Description	Last Modified Date	App Type	Visibl...
1 All Tabs	AllTabSet		24/09/2024, 1:52 pm	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	24/09/2024, 1:52 pm	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	24/09/2024, 1:52 pm	Classic	✓
4 Automation	FlowsApp	Automate business processes and repetitive tasks.	24/09/2024, 1:57 pm	Lightning	✓
5 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	24/09/2024, 1:56 pm	Lightning	✓
6 Community	Community	Salesforce CRM Communities	24/09/2024, 1:52 pm	Classic	✓
7 Content	Content	Salesforce CRM Content	24/09/2024, 1:52 pm	Classic	✓
8 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	24/09/2024, 1:52 pm	Lightning	✓
9 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	24/09/2024, 1:52 pm	Lightning	✓
10 GAS STATION	GAS_STATION		24/09/2024, 2:29 pm	Lightning	✓
11 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	24/09/2024, 1:52 pm	Lightning	✓
12 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	24/09/2024, 1:52 pm	Classic	✓
13 Platform	Platform	The fundamental Lightning Platform	24/09/2024, 1:52 pm	Classic	✓
14 Queue Management	QueueManagement	Create and manage queues for your business.	24/09/2024, 1:52 pm	Lightning	✓

App Settings

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name [?]
GAS STATION

* Developer Name [?]
GAS_STATION

Description [?]
Enter a description...

App Branding

Image [?]
Upload

Primary Color Hex Value [?]
#0070D2

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

GS GAS STATION

FIELDS:

Creating Junction Object

1. Go to the setup page ? click on object manager ? From drop down click edit for Fuel details object.
2. Click on fields & relationship ? click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. Select the related object “ Supplier ” and click next.
5. Give Field Label as “Supplier Name” and click Next.
6. Next ? Next ? Save & New.
7. Follow the same steps from 1 to 3.
8. Select the related object “ Gas station ” and click Next.
9. Give Field Label as “Gas Station” and click Next.
10. Next ? Next ? Save.

SETUP > OBJECT MANAGER

Fuel details

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Fuel details Custom Field

Supplier Name

Back to Fuel details

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Supplier Name	Object Name	Fuel details
Field Name	Supplier	Data Type	Master-Detail
API Name	Supplier__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Kolli Deepika 24/09/2024, 2:32 pm	Modified By	Kolli Deepika 24/09/2024, 2:44 pm

Master-Detail Options

Related To	Supplier	Child Relationship Name	Fuel_details
Related List Label	Fuel details		
Sharing Setting	Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		
Reparentable Master Detail	<input type="checkbox"/>		

Lookup Filter

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

The screenshot shows the 'Fuel details' field configuration page in Salesforce Setup. The left sidebar lists navigation options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled 'Fuel details Field' and 'Fuel details Name'. It includes a 'Back to Fuel details' link and two buttons: 'Set Field-Level Security' and 'View Field Accessibility'. Below these is a 'Field Information' table.

Field Information	Field Label	Fuel details Name	Field Name	Name
	Data Type	Auto Number		
	Description			
	Data Owner			
	Field Usage			
	Data Sensitivity Level			
	Compliance Categorization			
	Display Format	fuel-000		

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.

The screenshot shows the 'Supplier' field configuration page in Salesforce Setup. The left sidebar lists navigation options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Rollup Rules. The main content area is titled 'Supplier Field' and 'Supplier Name'. It includes a 'Back to Supplier' link and two buttons: 'Set Field-Level Security' and 'View Field Accessibility'. Below these is a 'Field Information' table.

Field Information	Field Label	Supplier Name	Field Name	Name
	Data Type	Text(60)		
	Description			
	Data Owner			
	Field Usage			
	Data Sensitivity Level			
	Compliance Categorization			

Below the table is a 'Validation Rules' section with a 'New' button and the text 'No validation rules defined.'

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

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.

Creating Picklist Field in Buyer Object

Creating the validation rule

Creating Remaining Fields in Objects:

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

Details

Fields & Relationships

5 Items, Sorted by Field Label

Q Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
sum of Fuel supplied	sum_of_Fuel_supplied__c	Roll-Up Summary (SUM Fuel details)		
Supplier Name	Name	Text(80)		✓

Details

Fields & Relationships

13 Items, Sorted by Field Label

Q Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid__c	Formula (Currency)		
Buyer	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Customer Name	Customer_Name__c	Formula (Text)		
email	email__c	Email		
First name	First_name__c	Text(255)		
Fuel filled in vehicle	Fuel_filled_in_vehicle__c	Number(5, 0)		
Gas Station name	Gas_Station_name__c	Master-Detail(Gas Station)		✓
Last Modified By	LastModifiedById	Lookup(User)		

Details

Fields & Relationships

6 Items, Sorted by Field Label

Q Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Fuel details Name	Name	Auto Number		✓
Fuel Supplied	Fuel_Supplied__c	Number(5, 0)		
Gas Station	Gas_Station__c	Master-Detail(Gas Station)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Supplier Name	Supplier__c	Master-Detail(Supplier)		✓

Details

Fields & Relationships

8 Items, Sorted by Field Label

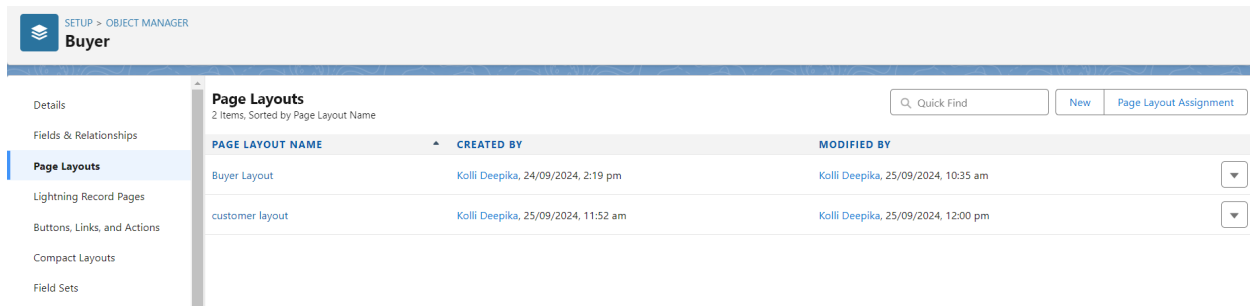
Q Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Fuel available in bunk	Fuel_available_in_bunk__c	Formula (Number)		
Fuel Price Per Liter	Fuel_Price_Per_Liter__c	Number(5, 0)		
Fuel supplied to bunk	Fuel_supplied_to_bunk__c	Roll-Up Summary (SUM Fuel details)		
Fuel used	Fuel_used__c	Roll-Up Summary (SUM Buyer)		
Gas Station	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

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.



The screenshot shows the Salesforce interface for managing page layouts for the 'Buyer' object. The left sidebar contains navigation links: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, and Field Sets. The main content area is titled 'Page Layouts' and shows a list of 2 items, sorted by Page Layout Name. The list has columns for Page Layout Name, Created By, and Modified By. Two page layouts are listed: 'Buyer Layout' and 'customer layout'. Each layout has a dropdown arrow on the right side.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Buyer Layout	Kolli Deepika, 24/09/2024, 2:19 pm	Kolli Deepika, 25/09/2024, 10:35 am
customer layout	Kolli Deepika, 25/09/2024, 11:52 am	Kolli Deepika, 25/09/2024, 12:00 pm

1. Go to Setup ? Click on Object Manager ? Search for the object (Buyer) ? From drop down select the object and click on it.
2. Click on Page layout ? Click on New
3. Select the existing page layout, and give the page layout name as “customer layout”, and click save.
4. Drag and drop the section field to Buyer details and create the section.
5. Enter the section name as “Persoanl details”, ? click Ok
6. Now drag the fields to this section that mentioned , they are
 - First name , last name , customer name , phone number, email, Gas station name.
7. Follow the same process for another two sections as shown above , they are
8. One section is “ vehicle info ” , drag the fields that are
 - Fuel filled in vehicle, vehicle type.
9. Another section is “Recepit details ” , and drag the fields that are
 - Mode of payment , Amount paid.
10. Then , Click save.

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 delete 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.

Create 3 profiles:

1. Manager profile
2. Sales Executive Profile
3. Sales Person Profile

Setup Home Object Manager

profiles

Users

Profiles

Didn't find what you're looking for? Try using Global Search.

SETUP Profiles

Profiles

All Profiles Edit Delete Create New View

New Profile

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	sales_executive	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	sales_person	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

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.
5. repeat the similar steps for manager and sales person

Role & Role Hierarchy:

Creating Manager Role

1. Go to quick find ? Search for Roles ? click on set up roles.
2. Click on Expand All and click on add role under whom this role works.
3. Give Label as “Manager” and Role name gets auto populated. Then click on Save.

Creating the Role Hierarchy

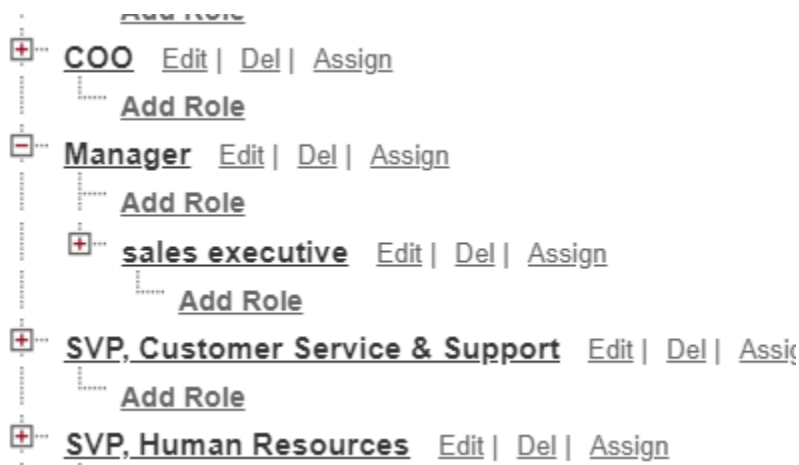
You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

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



Creating another roles



Users:

Create a 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

Creating another users

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users [Edit](#) [Create New View](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dwu000009eo6e2as.kvsthpomiksu@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Deepika_Kolli	KDeep	deepikakolli88@gmail.com		✓	System Administrator
<input type="checkbox"/> Edit	Mikaelson_Niklaus	nmika	deepika5@gmail.com	Manager	✓	Manager
<input type="checkbox"/> Edit	Ten_Ben	bten	deepikakolli7@gmail.com	sales person	✓	sales person
<input type="checkbox"/> Edit	Ulrich_John	julri	deepikakolli6@gmail.com	sales executive	✓	sales executive
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dwu000009eo6e2as.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00dwu000009eo6e2as.com		✓	Analytics Cloud Security User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Permission sets

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

1. Go to setup ? type "permission sets" in quick search ? select permission sets ? New
2. Enter the label name as "P1", API will be auto populated ? save.
3. Under Apps Select object settings.
4. Create on fuel details object? click on edit? under object permission check for read and create.
5. Click on Save.
6. After saving the permission click on the Manage assignment
7. Now click on the Add Assignment.
8. Now select the users which you have created in user milestone, using sales executive profile and click on Next ? Assign? Done.

Q permissi

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for?

Try using Global Search.

SETUP

Permission Sets

Permission Set

P1

Find Settings...

Clone

Edit Properties

Manage Assignments

View Summary

Permission Set Overview

Description	additional access for sales executive profile	API Name	P1
License		Namespace Prefix	
Session Activation Required	<input type="checkbox"/>	Created By	Kolli Deepika 25/09/2024, 2:54 pm
Permission Set Groups Added To	0	Last Modified By	Kolli Deepika 25/09/2024, 2:56 pm

Apps

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

Setup For OWD:

1. Go to setup ? type “sharing settings ” in quick search ? Click edit.
Scroll down, change the default internal access to “ public read-only” for Gas station and Supplier object.
2. Click save.
3. Extra information, By these every profile has their own access, according to their profile.
4. 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.

Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Buyer	Controlled by Parent	Controlled by Parent	
Fuel details	Controlled by Parent	Controlled by Parent	
Gas Station	Public Read Only	Private	✓
Supplier	Public Read Only	Private	✓

In Salesforce, OWD (Organization-Wide Defaults) defines the baseline level of access to data records for all users in an organization. OWD settings are used to determine the default sharing model for objects like accounts, contacts, and opportunities. There are three main OWD settings:


1. **Private** – Only the record owner and users above in the role hierarchy can access the record.
2. **Public Read Only** – All users can view records, but only the owner and those higher in the role hierarchy can edit them.
3. **Public Read/Write** – All users can view and edit records.

These settings can be further refined with role hierarchies, sharing rules, and manual sharing.

User Adoption:


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. Creating the supplier record in fuel detail record, by clicking the “ new supplier ”
5. Creating the Gas station record in fuel details record, by clicking on new gas station.
6. Fill the remaining details

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







Delete a record

Fuel details

Recently Viewed ▾ 

New Import Assign Label

0 items • Sorted by Fuel details Name • Updated a minute ago

☐ Fuel details Name ▾

▼

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.

Sharing a report folder

Create Report

The screenshot shows the 'Reports' section of the 'GAS STATION' application. The top navigation bar includes a search bar and several icons. Below the navigation bar, the 'Reports' section is active, showing a list of reports under the 'Recent' tab. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. A report titled 'Amount range' is listed with a folder of 'Fuel Estimation' and created by 'Kolli Deepika' on '25/9/2024, 7:14 pm'. A context menu is open for the 'Amount range' report, showing options: Run, Edit, Subscribe, Export, Delete, Add to Dashboard, Favorite, and Move.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Amount range		Fuel Estimation	Kolli Deepika	25/9/2024, 7:14 pm	

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

Dashboards

Recent

1 item

DASHBOARDS

Recent

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Dashboard Name

Description

Folder

Created By

Created On

Subscribed

Estimation amount

Amount estimation dashboard

Kolli Deepika

26/9/2024, 10:34 am

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.

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.

After forming a path Give the Flow label , Flow Api name will be autopopulated.
And click save, and click on activate

Related

Details

Information

Flow Label

Flow Label

Description

Associated Record

Created By

Last Modified

Category

API Name

Flow_Label

Flow Type

Autolaunched No Trigger Flow

Created Date

26/09/2024, 11:03 am

Last Modified Date

26/09/2024, 11:03 am

Subcategory