

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

by

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PROJECT ABSTRACT

This application aims to streamline the operations of gas filling stations by integrating a robust **Customer Relationship Management (CRM)** system specifically designed for administrative use. By implementing CRM software, gas stations can optimize inventory management, monitor fuel levels, track customer usage patterns, and automate routine tasks such as invoicing and report generation. The system will also offer real-time data analysis, helping station managers to make informed decisions about pricing, promotions, and resource allocation. Additionally, it enables seamless communication with both customers and suppliers, ensuring smooth transactions and efficient service delivery.

The **CRM-based platform** will enhance the overall customer experience by providing personalized services such as loyalty programs, scheduled fuel refills, and digital payment options. For the admin, the application will facilitate better management of station assets, reduce operational costs through automation, and ensure compliance with safety regulations by tracking equipment maintenance schedules. With an intuitive user interface and powerful analytics, this solution will not only improve the daily workflow but also contribute to long-term profitability and customer satisfaction for **gas filling stations**.

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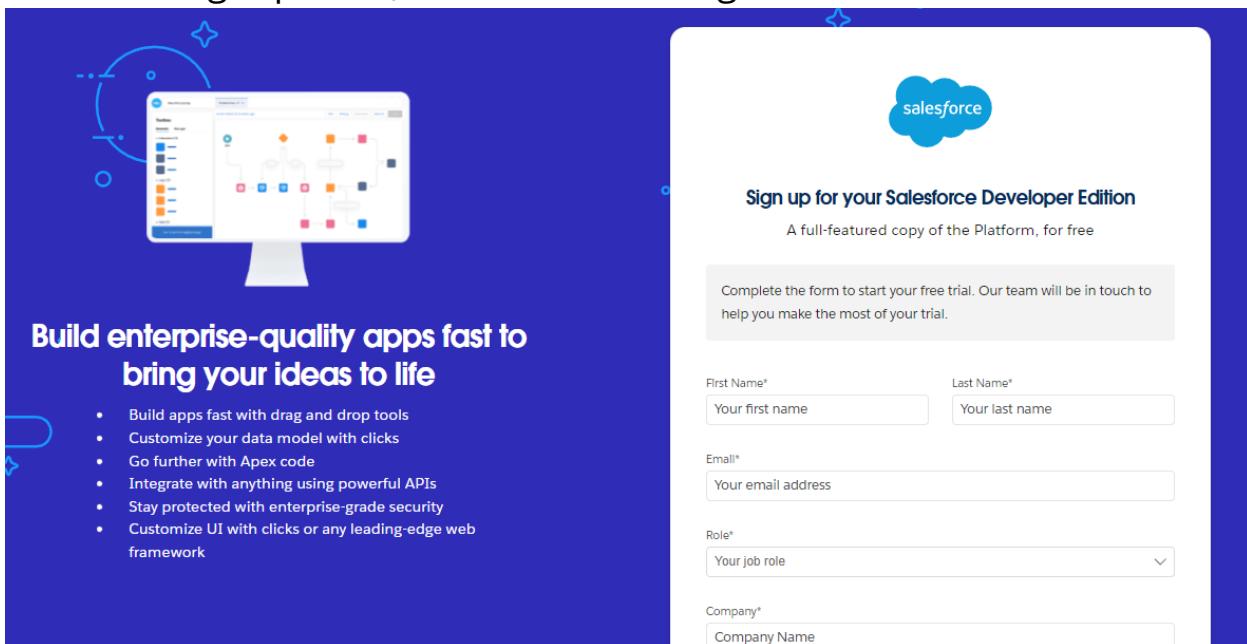
1. Salesforce

Introduction to Salesforce:

Salesforce is a cloud-based customer relationship management (CRM) platform that helps businesses manage their interactions with customers, streamline sales processes, and improve overall business efficiency. Its cloud-based architecture allows companies to access data from anywhere, collaborate in real-time, and easily scale their operations without the need for on-premise infrastructure.

Creating Developer Account

- ✓ Head to <https://developer.salesforce.com/signup>
- ✓ On the signup form, enter the following details:



The image consists of two side-by-side screenshots. The left screenshot features a blue background with a white computer monitor in the center. On the monitor, there's a screenshot of a Salesforce application interface showing various data points and relationships. Above the monitor, there are abstract shapes like circles and stars. Below the monitor, the text reads: "Build enterprise-quality apps fast to bring your ideas to life". To the right of the monitor, there's a bulleted list of features: "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". The right screenshot shows the official Salesforce sign-up page. It has a white header with the "salesforce" logo. Below it, the text "Sign up for your Salesforce Developer Edition" and "A full-featured copy of the Platform, for free". A gray box contains the instruction: "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.". The form itself has several input fields: "First Name*" with placeholder "Your first name", "Last Name*" with placeholder "Your last name", "Email*" with placeholder "Your email address", "Role*" with placeholder "Your job role" (a dropdown menu), and "Company*" with placeholder "Company Name".

1. First Name
2. Last Name
3. Email
4. Role: Developer
5. Company: Respective College Name
6. Country: India

7. Postal Code: Pin Code of your Area

Note:

Username : should be a combination of your name and company
This need not be an actual email id, you can give anything in the format :
username@organization.com

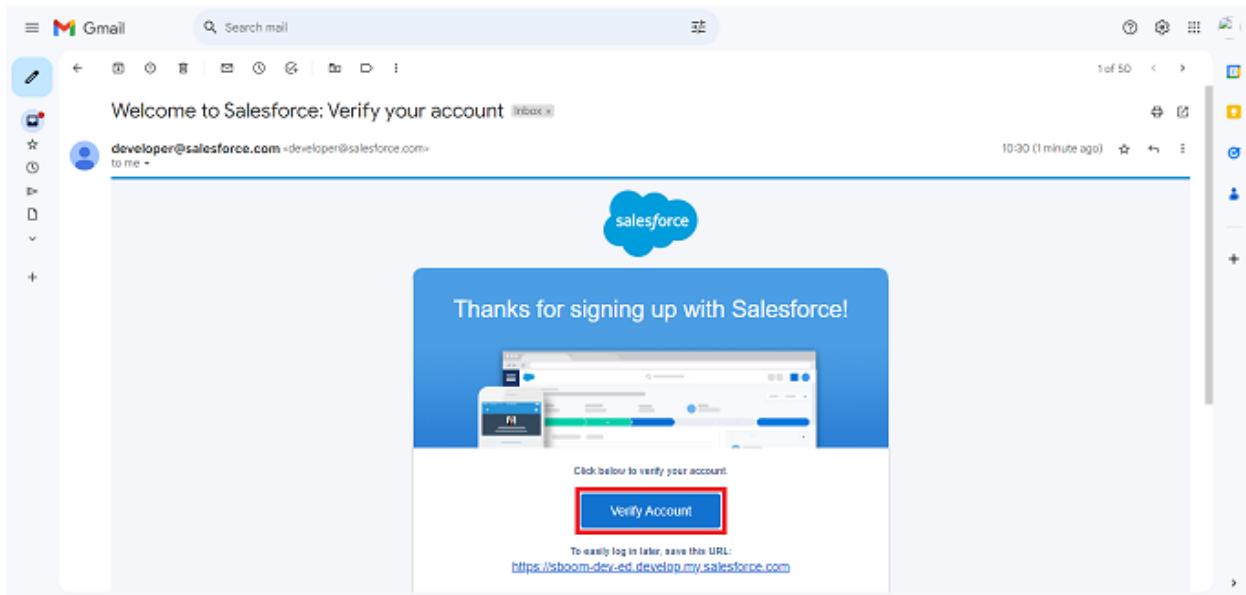
Click on sign me up after filling these.

Account Activation

After filling the signup form, you will get a email from **developer@salesforce.com** to verify the account.

This email may take the time of receiving upto 10-15 minutes.

Open the inbox of your email, search for the mail and click on **Verify Account**.



After clicking on **Verify Account**, setup a **new password** and **confirm the password**. Also answer the **security question**. You will redirect to your **salesforce setup page**.

The screenshot shows the Salesforce Setup Home page. The top navigation bar includes a cloud icon, the word "Setup", and tabs for "Home" and "Object Manager". A search bar says "Search Setup" and there are various system icons on the right. The main content area is titled "SETUP Home" with a "Create" button. It features three main sections: "Get Started with Einstein Bots" (with a "Get Started" button), "Mobile Publisher" (with a "Learn More" button), and "Real-time Collaborative Docs" (with a "Get Started" button). On the left, a sidebar lists categories like "Setup Home", "Service Setup Assistant", "Multi-Factor Authentication Assistant", etc., under "ADMINISTRATION".

2. Object

What Is an Object?

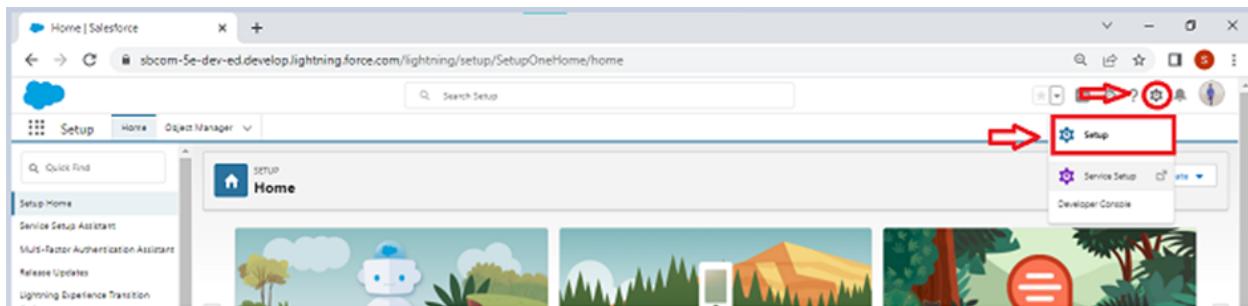
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects?

Salesforce objects are of two types:

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

To Navigate to **Setup** page:

Click on **gear icon** ? click **setup**.

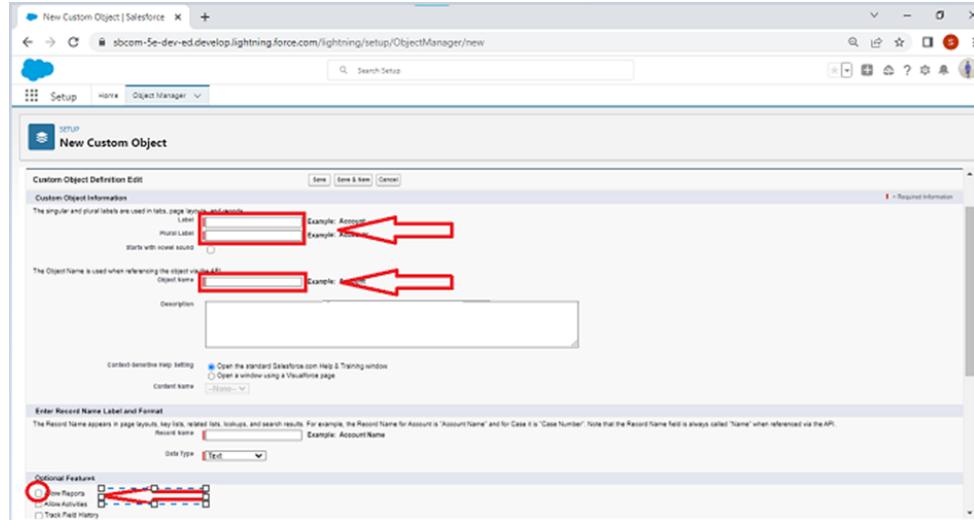


To create an object:

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



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



4. Click on **Save**.

Create Supplier 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?** Supplier
2. **Plural label name?** Suppliers
3. Enter Record Name Label and Format
 - **Record Name?** Supplier Name
 - **Data Type?** Name
2. Click on **Allow reports and Track Field History**,
3. **Allow search?** Save.

SETUP > OBJECT MANAGER
Supplier

Fields & Relationships					
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)		✓	▼

Create Gas Station Object

To create an object:

- From the **setup page** ? Click on **Object Manager** ? Click on **Create** ? Click on **Custom Object**.
- Enter the **label name**? Gas Station
- Enter **Record Name**?

Name Label and Format

- Record Name ?**
Gas Station
- Data Type ?**
Auto Number
- Display Format**
? Gas-{000}
- Starting number ?** 1

- Click on **Allow reports and Track Field History**
- Allow search** ? Save.

SETUP > OBJECT MANAGER
Gas Station

Fields & Relationships					
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/litre	Fuel_Price_litre_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)			

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**

The screenshot shows the Salesforce Setup page with the 'Object Manager' tab selected. In the center, the 'Buyer' object is displayed. On the left, a sidebar lists various configuration options like Page Layouts, Lightning Record Pages, and Buttons, Links, and Actions. The main area is titled 'Fields & Relationships' and contains a table with 13 items. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes fields such as Amount Paid (Formula Number), Buyer Name (Auto Number), Created By (Lookup User), Customer Name (Formula Text), email (Email), First Name (Text), and Fuel filled in vehicle (Number). A 'Quick Find' search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking' are also visible at the top of the table.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid__c	Formula (Number)		
Buyer Name	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(5)		
Fuel filled in vehicle	Fuel_filled_in_vehicle__c	Number(5, 0)		

The screenshot shows the Salesforce Setup interface. At the top, there's a blue header bar with a cloud icon, a search bar containing "Search Setup", and various navigation icons. Below the header, the main content area has a dark blue header titled "SETUP > OBJECT MANAGER" with a "Fuel details" sub-header. On the left, a sidebar lists several setup categories: Details, Fields & Relationships (which is selected and highlighted in blue), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled "Fields & Relationships" and shows a table with 6 items, sorted by Field Label. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Each row contains a field name, its internal name, data type, a dropdown menu for controlling field, and a checked checkbox for indexing.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	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	LastModifiedBy	Lookup(User)		
Supplier Name	Supplier__c	Master-Detail(Supplier)		✓

3. Tabs

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

Types of Tabs:

1. Custom Tabs :

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

2. Web Tabs :

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

3. Visualforce Tabs :

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

4. Lightning Component Tabs :

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

5. Lightning Page Tabs :

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

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

Creating a Custom Tab

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 following highlights:

- A red box surrounds the search bar at the top.
- A red arrow points to the "Custom Tabs" link under the "Tabs" category in the sidebar.
- A red box surrounds the "Custom Tabs" section title.
- A red arrow points to the "new" button at the top right of the list table.
- A red box surrounds the "new" button at the top right of the list table.

The list table displays various custom tabs with columns for Action, Label, Tab Style, and Description. Some rows have small icons next to them.

- 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** .
- Make sure that **Append tab to users'** existing personal customizations is **checked**.
- Click **save**.

The screenshot shows the "Step 1, Enter the Details" configuration page with the following highlights:

- A red box surrounds the "Supplier" option in the "Object" dropdown.
- A red box surrounds the "Buyer" option in the "Tab Style" dropdown.
- A red box surrounds the "Supplier" option in the "Home Page Custom Link" dropdown.
- A red arrow points to the "Next" button at the bottom right.

The page includes fields for "Description" and "Enter a short description".



Save **Cancel**

Analytics Studio (standard__Insights)	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard__LightningService)	<input type="checkbox"/>
Sales (standard__LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>
<input checked="" type="checkbox"/> Append tab to users' existing personal customizations	
<input type="button" value="Previous"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Analytics Studio (standard__Insights)	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard__LightningService)	<input type="checkbox"/>
Sales (standard__LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>
<input checked="" type="checkbox"/> Append tab to users' existing personal customizations	
<input type="button" value="Previous"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>	

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 .

The screenshot shows the Salesforce Setup interface with the 'Tabs' page open. The left sidebar has a search bar and navigation links for 'User Interface' (selected) and 'Tabs'. The main content area is titled 'Custom Tabs' and contains a table for 'Custom Object Tabs'. The table includes columns for Action (Edit | Del), Label, Tab Style, and Description. The data is as follows:

Action	Label	Tab Style	Description
Edit Del	Buyers	Presenter	
Edit Del	Fuel details	Form	
Edit Del	Gas Stations	Factory	
Edit Del	Suppliers	People	

Below this is a section for 'Web Tabs' which states 'No Web Tabs have been defined'.

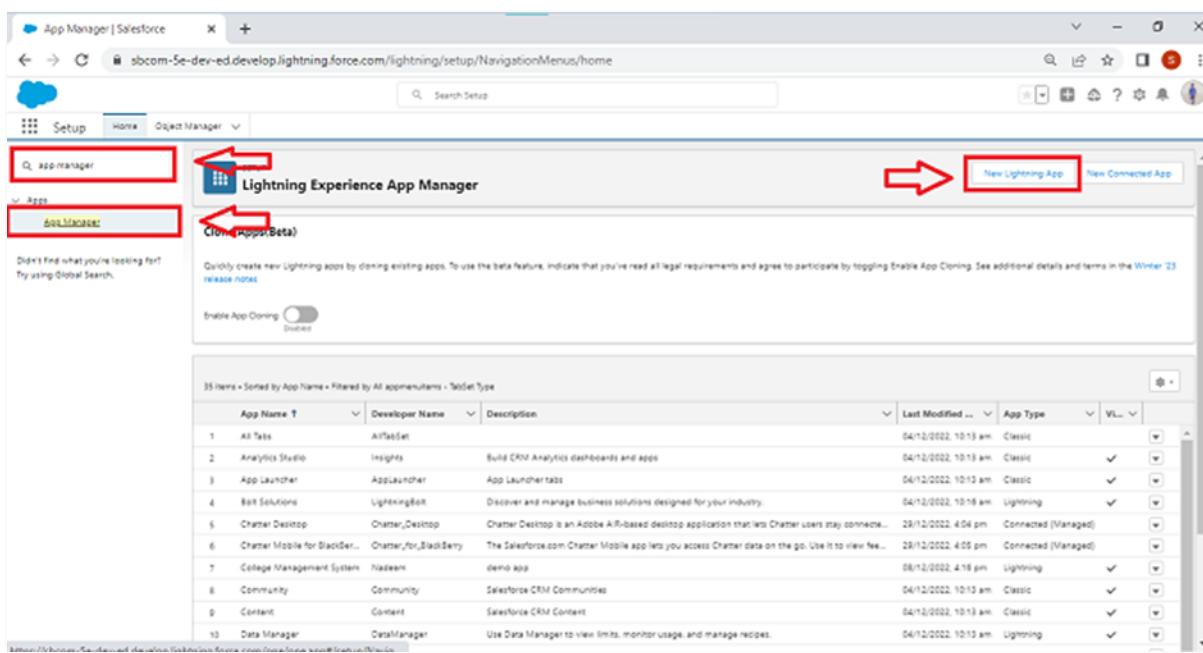
4. The Lightning App

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.

To create a lightning app page:

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



2. Fill the **app name** in app details as **GAS STATION** ?**Next** ? (App option page) **keep it as default** ? **Next** ? (Utility Items) **keep it as default** ? **Next**.

New Lightning App

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 *

* Developer Name *

Description

App Branding

Image Primary Color Hex Value

Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next

3. To Add Navigation Items:

New Lightning App

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items Create Type to filter list...

- Accounts
- Activities
- Alert Settings
- All Sites
- Alternative Payment Methods
- App Launcher
- Appointment Invitations

Selected Items

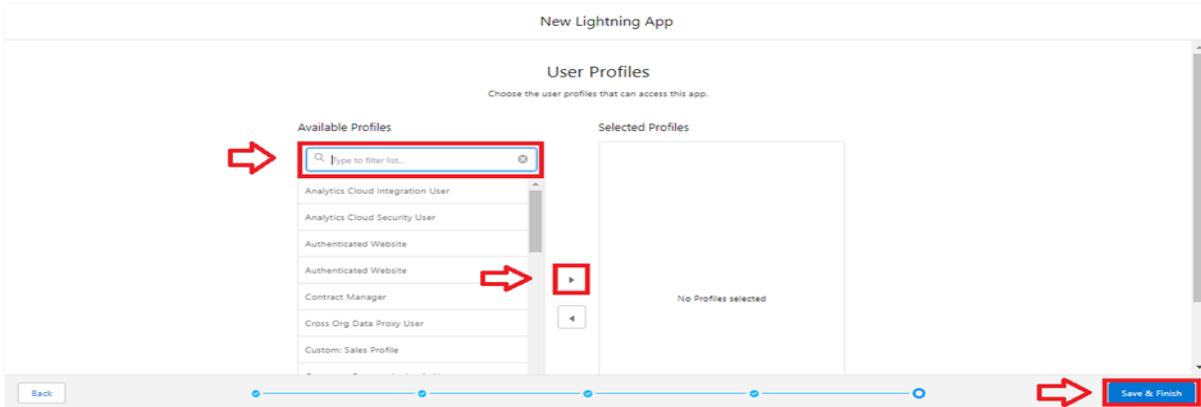
- No items selected

> <

Next

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

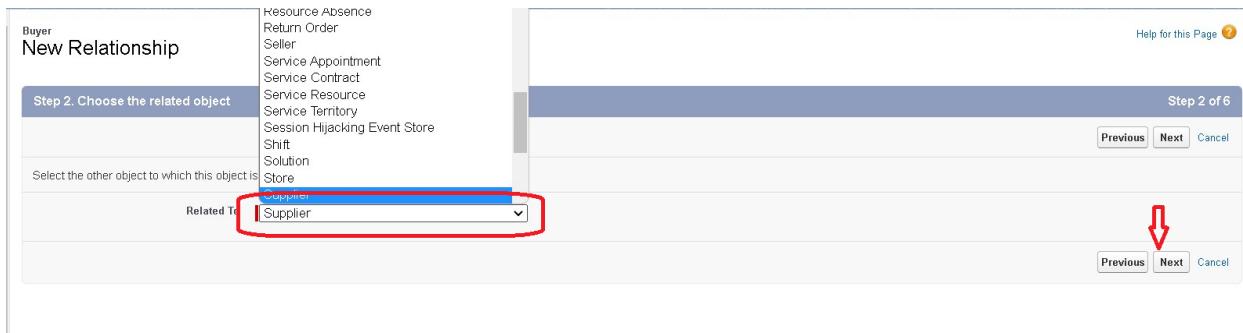
1. Go to the **setup page** ? click on **object manager** ? From drop down click **edit for Fuel details object**.

The screenshot shows the Salesforce Object Manager interface. A new object named 'Fuel details' has been created. The 'Label' field is set to 'Fuel' and the 'API Name' is 'Student_Fuel_Details'. The 'Type' is 'Custom Object' and it is associated with the 'College Management System'. The 'Description' is 'Created for the purpose of junction object'. The 'Last Modified' date is '16/10/2022' and the 'Deployed' status is checked.

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

The screenshot shows the 'Fields & Relationships' section for the 'Supplier' object. On the left sidebar, 'Fields & Relationships' is selected. In the main area, there is a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table contains five rows: 'Created By' (CreatedBy, Lookup(User)), 'Last Modified By' (LastModifiedBy, Lookup(User)), 'Owner' (OwnerId, Lookup(User/Group)), 'Sum of Fuel supplied' (Sum_of_Fuel_supplied_c, Roll-Up Summary (SUM Fuel details)), and 'supplier Name' (Name, Text(80)). A red arrow points to the 'New' button at the top right of the table.

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.**

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

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**.

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

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

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

Data Type

None Selected Select one of the data types below.

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

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

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

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

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is renamed on all detail records

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

Step 2. Enter the details Step 2 of 5

Field Label **Sum of Fuel supplied**

Field Name **Sum_of_Fuel_supplied**

Description

Help Text

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

Save

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 = Required Information

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate **Fuel supplied**
--NONE--

Filter Criteria

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

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 []

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

Formula Return Type

None Selected Select one of the data types below.

Checkbox Calculate a boolean value.
Example: `[TODAY() > CloseDate]`

Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `[Gross Margin = Amount - Cost__c]`

Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `[Reminder Date = CloseDate - 7]`

Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `[CloseDate + 1440 * 60 * 60]`

Number Calculate a numeric value.
Example: `[Fahrenheit = 1.8 * Celsius__c + 32]`

Percent Calculate a percent and automatically add the percent sign to the number.
Example: `[Discount = (Amount - Discounted_Amount__c) / Amount]`

Previous Next Cancel

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

6. Insert field formula should be : **Fuel_supplied_to_bunk_c - Fuel_Used_c**

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

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

Simple Formula Advanced Formula

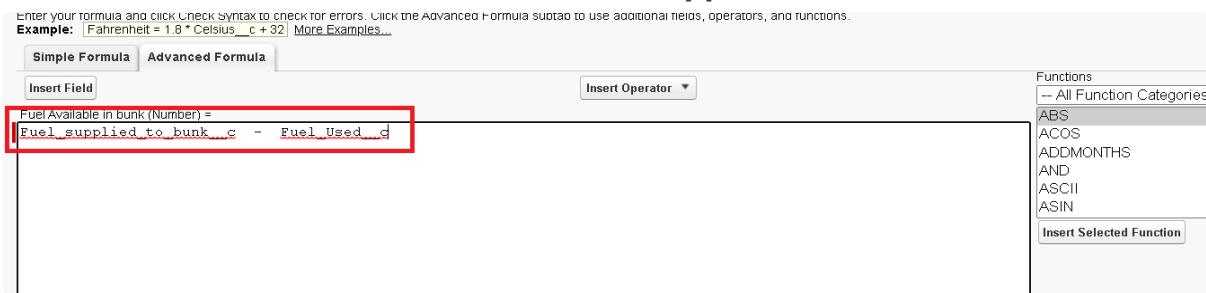
Insert Field Insert Operator ▾

`FuelAvailableInBunk (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 whether that the fields that mentioned in the formula field are created are not , if not go to activity 9 and create that fields mentioned in Buyer object

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

1. Go to **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

Field Label [] Field Name []

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

Formula Return Type

None Selected Select one of the data types below.

Checkbox Calculate a boolean value.
Example: `TODAY() > CloseDate`

Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost__c`

Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = CloseDate - 7`

Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `Next = NOW() + 1`

Number Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius__c + 32`

Percent Calculate a percent, and automatically add the percent sign to the number.
Example: `Discount = (Amount - Discounted_Amount__c) / Amount`

Step 2 of 5 Previous Next Cancel

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 Field Insert Operator

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

Functions

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

Insert Selected Function

Formula Editor

Creating Picklist Field in Buyer Object

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

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

Creating the validation rule

Creating the validation rule for phone number field in Buyer object

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

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

The screenshot shows the 'Validation Rules' section of the Salesforce Object Manager. The left sidebar lists various setup options like Buttons, Links, and Actions, Field Sets, Object Limits, Record Types, etc., with 'Validation Rules' being the selected tab. The main area displays a table of validation rules. One rule named 'phone' is listed, which checks the 'Phone Number' field for 'incorrect data'. The 'New' button in the top right is highlighted with a red arrow.

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

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

The screenshot shows the 'Validation Rule Edit' screen. The 'Rule Name' is set to 'phone'. The 'Error Condition Formula' field contains the formula 'NOT (REGEX(Phone_Number__c , "[6-9]{1}[0-9]{9}"))'. This formula is highlighted with a red box. To the right, a functions dropdown is open, showing various mathematical and string functions like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. A red box highlights the 'Check Syntax' button at the bottom left of the formula input field. The status bar indicates '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**.

The screenshot shows the 'Error Message' configuration screen. The 'Error Message' field contains the text 'incorrect data'. Below it, the 'Error Location' dropdown is set to 'Field' and 'Phone Number'. A red arrow points to the 'Save' button in the bottom right corner.

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 Price/litre	Number (length=5)
		Fuel used	Rollup summary (Buyer object)
		Fuel available in bunk	Formula
		Fuel supplied to bunk	Rollup summary (Fuel detail object)
4	Buyer		
		First name	Text
		Last name	Text
		Customer name	Formula
		Phone number	Phone
		email	email
		Fuel filled in vehicle	Number (length=5)
		Vehicle type	picklist values Two wheeler
			Three wheeler
			Four wheeler
			Six wheeler
			Eight wheeler

			others
		Mode of payment	Picklist values
			Credit card
			Debit card
			Net banking
			UPI
			Cash
		Amount paid	Formula

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

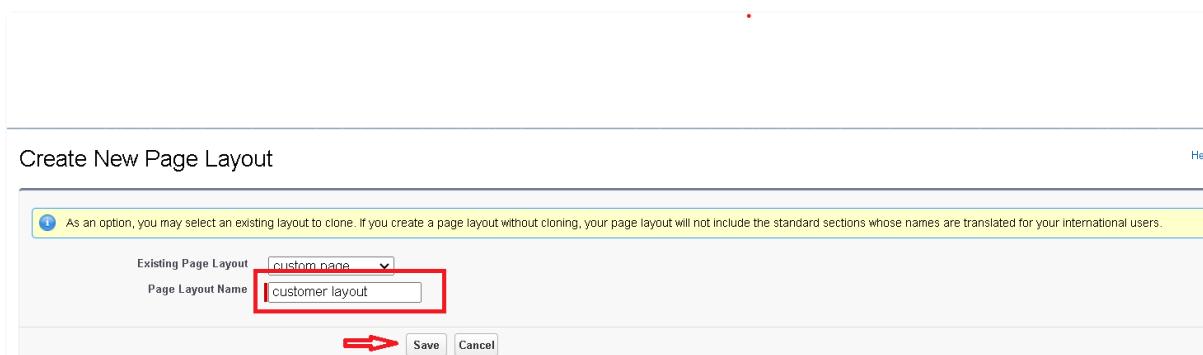
To Create a Page layout:

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**.



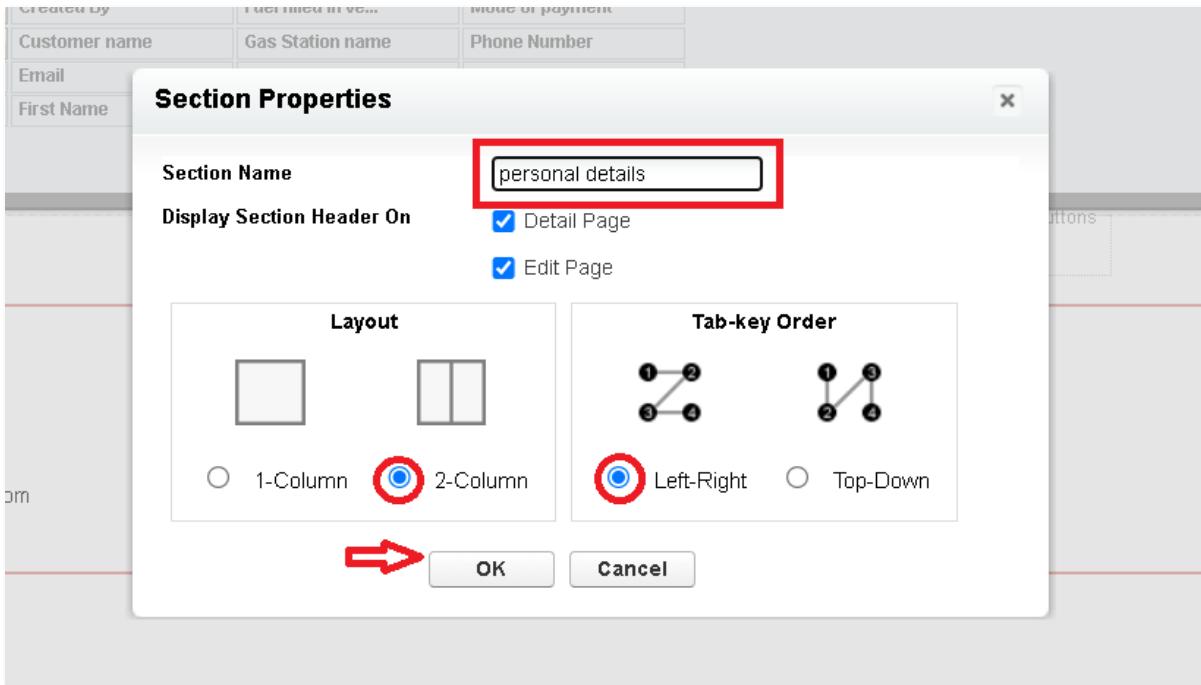
The screenshot shows the Salesforce Object Manager for the 'Buyer' object. In the 'Page Layouts' section, there is one item listed: 'Customer Layout'. A red arrow points to the 'Customer Layout' entry. Another red arrow points to the 'New' button at the top right of the page layout list.

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 existing layouts. The 'Existing Page Layout' dropdown is set to 'Custom page' and the 'Page Layout Name' input field contains 'customer layout'. A red arrow points to the 'Save' button at the bottom of the dialog.

4. **Drag and drop** the **section** field to **Buyer details** and **create** the section.
5. Enter the **section name** as "**Personal 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 “ **Receipt details** ”, and drag the fields that are
 - **Mode of payment , Amount paid.**
10. Then , Click **save**.

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists
- Report Charts

Quick Find Field Name

Section	Created By	Fuel filled in ve...	Mode of payment
Blank Space	Customer name	Gas Station name	Phone Number
	Amount Paid	Last Modified By	Vehicle type
	Buyer number	First Name	Last Name

Personal Details

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

Vehicle Info

Fuel filled in vehicle	79.937
Vehicle type	Sample Text

Receipt details

Mode of payment	Sample Text
Amount Paid	₹123.45

Information (Header visible on edit only)

GEN 2004 001224

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**.

The screenshot shows the Salesforce Setup interface under the 'Profiles' section. A modal window titled 'Clone Profile' is open. It contains fields for 'Existing Profile' (set to 'Standard User'), 'User License' (set to 'Salesforce'), and 'Profile Name' (set to 'Manager'). The 'Save' button is highlighted with a red arrow.

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

The screenshot shows the 'Profile Manager' page for the 'Manager' profile. It displays various profile details and permissions. The 'Edit' button is highlighted with a red box.

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

The screenshot shows the 'Custom App Settings' screen. It lists several apps with their visibility and default status. The 'Gas Station (Gas_Station)' app has its 'Default' checkbox checked, which is highlighted with a red arrow.

	Visible	Default		Visible	Default
Analytics Studio (standard_Insights)	<input type="checkbox"/>	0	Platform (standard_Platform)	<input checked="" type="checkbox"/>	0
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	0	WDC (standard_Work)	<input type="checkbox"/>	0
Gas Station (Gas_Station)	<input checked="" type="checkbox"/>	0			

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

The screenshot shows the 'Custom Object Permissions' section of the Salesforce setup. It includes two tables of permissions:

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

Session Settings

Session Times Out After: 8 hours of inactivity

Session Security Level Required at Login: None

Password Policies

- User passwords expire in: Never expires
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha, numeric, and special characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 3
- Lockout effective period: 30 minutes
- Obscure secret answer for password:

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.

The screenshot shows the 'Custom Object Permissions' section for the 'Sales Executive' profile. It includes two tables of permissions:

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

5. And click **save**.

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			
Buyers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
Fuel details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
	Basic Access			Data Administration					
	Read	Create	Edit	Delete	View All	Modify All			
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"/>
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"/>

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. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar on the left contains the text 'roles'. The sidebar on the left has sections for 'Users' (with 'Roles' highlighted by a red box) and 'Feature Settings' (with 'Sales', 'Service', and 'Case Teams' sections). The main content area is titled 'Understanding Roles' and displays a 'Territory-based Sample' role hierarchy. At the bottom right of the main content area, there is a red box around the 'Set Up Roles' button.

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

The screenshot shows the 'Your Organization's Role Hierarchy' page. At the top, there is a 'Collapse All' and 'Expand All' button. Below it, a tree view of roles: 'Nick Enterprises' (expanded), 'CFO' (expanded), 'HR' (under CFO), 'Manager' (under CFO), 'On Site Emp' (under Manager), and 'Remote Emp' (under Manager). Each role node has 'Edit | Del | Assign' and 'Add Role' buttons. A red box highlights the 'Add Role' button under the 'CFO' node.

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

Save..

The screenshot shows a 'Role Edit' dialog box. It contains the following fields:

- Label: Manger (highlighted with a red arrow)
- Role Name: Manger
- This role reports to: CEO
- Role Name as displayed on reports: (empty)

At the bottom are three buttons: a red arrow pointing right, Save, Save & New, and 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**.

The screenshot shows a hierarchical list of roles under 'Thesmartbridge':

- CEO** (highlighted with a red circle)
- CFO**
- COO**
- Manger** (highlighted with a red box around its 'Add Role' link)
- SVP, Customer Service & Support**
- SVP, Human Resources**
- SVP, Sales & Marketing**

Each role item includes 'Edit | Del | Assign' links. The 'Add Role' links for each node are also highlighted with red boxes.

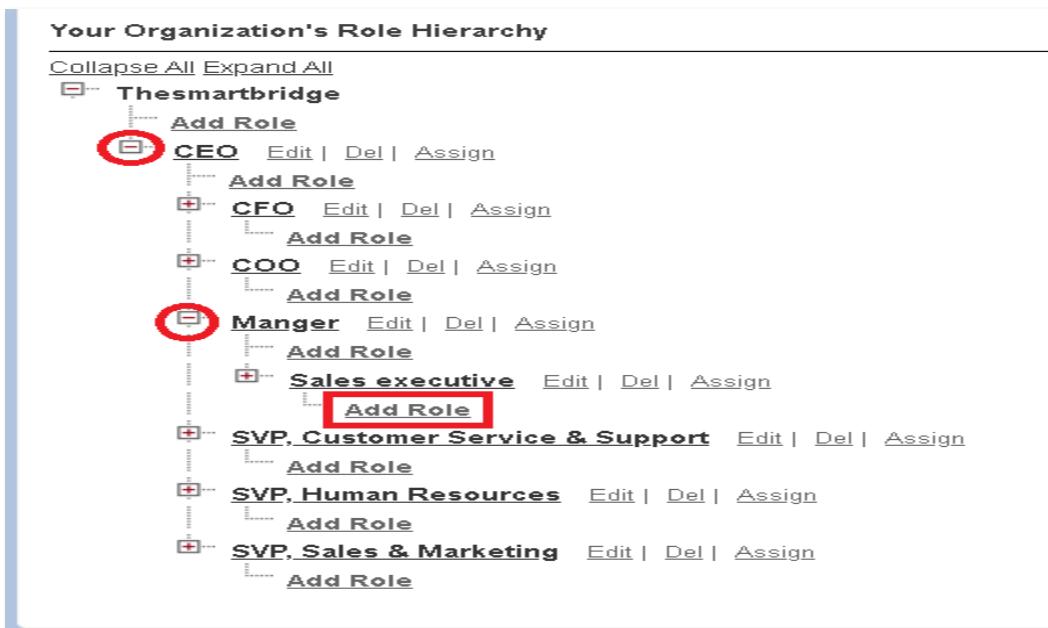
3. Give Label as "**sales executive**" and **Role name** gets auto populated. Then click on **Save**.

Role Edit
New Role

Help for this Page ?

Role Edit	
Label	<input type="text" value="Sales executive"/> ➡
Role Name	<input type="text" value="Sales_executive"/> ➡
This role reports to	<input type="text" value="Manger"/> ➡
Role Name as displayed on reports	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="Cancel"/>	

4. Repeat the same steps, another role.
5. Click **plus on CEO role**, and click **plus on manager**, and click **add role under sales executive**.



6. Give **Label** as “**sales person**” and **Role name** gets auto populated. Then click on **Save**.

Role Edit
New Role

Help for this Page ?

Role Edit	
Label	<input type="text" value="Sales person"/> ➡
Role Name	<input type="text" value="Sales_person"/> ➡
This role reports to	<input type="text" value="Sales executive"/> ➡
Role Name as displayed on reports	<input type="text"/>
<input type="button" value="Save"/> ➡ <input type="button" value="Save & New"/> <input type="button" value="Cancel"/>	

9. Users

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

Create User

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

New User

User Edit Save Save & New Cancel

General Information

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

Required Information

Role	Manger
User License	Salesforce
Profile	Manager
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Data.com User Type	--None--

10. **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. In the top left, there's a cloud icon, followed by 'Setup' and 'Home'. A search bar says 'Search Setup'. Below it, a sidebar has 'Permission sets' highlighted with a red box. Under 'Users', 'Permission Sets' is also highlighted with a red box. The main area is titled 'Permission Sets' and contains a table with columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The first row in the table is highlighted with a red box. At the bottom of the table, there are links for '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'.

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

The screenshot shows a modal dialog titled 'Enter permission set information'. It has fields for 'Label' (containing 'P1'), 'API Name' (containing 'P1'), 'Description' (containing 'additional access for sales executive profile'), and 'Session Activation Required' (with an unchecked checkbox). At the top right are 'Save' and 'Cancel' buttons, with 'Save' highlighted by a red arrow. A note at the top right says '| = Required Information'.

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 **(highlighted with a red box)**

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 with a red box)**

Permission Set Overview > Object Settings **Fuel details** **(highlighted with a red box)**

Fuel details **Save** **Cancel**

Tab Settings

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

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

5. Click on **Save**.

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

Current Assignments

Add Assignment

All Users

1 item selected

Full Name	Alias	Username	Role	Active	Profile
<input checked="" type="checkbox"/> abd c	ac	ab@cd1.com	Sales executive	<input checked="" type="checkbox"/>	sales executive
<input type="checkbox"/> Astro Nomical	anomi	astronomicalsecurity.2vhahccardajuzh67mibr0rqsab1dhzd@smart.com	<input type="checkbox"/>		Force.com - Free User
<input type="checkbox"/> Brochan Pane	bpane	bpane.kh061622.nvopq5td9yi.cwkqyhdbsxb@smart.com	<input type="checkbox"/>		Break Glass Administrator
<input type="checkbox"/> Chatter Expert	Chatter	chatty.00d5i00000dpzofeadnb26j1owcvnq@chatter.salesforce.com	<input checked="" type="checkbox"/>		Chatter Free User
<input type="checkbox"/> Cirrus Cash Flow	cirr	cirrus@cashflow.com	<input type="checkbox"/>		System Administrator

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

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 interface. The left sidebar has a search bar with 'sharing' typed in. Below it, under 'Security', the 'Sharing Settings' link 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 corner of the table is also highlighted with a red arrow. The table data is as follows:

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓

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

The screenshot shows a configuration page with several dropdown menus and checkboxes. The 'Gas Station' and 'Supplier' dropdowns are highlighted with a red box and are both set to 'Public Read Only'. The 'Save' button at the bottom left is also highlighted with a red box.

Entity	Access Level	Setting
Work Plan Template	Private	Private
Work Step Template	Private	Private
Work Type	Private	Private
Work Type Group	Public Read/Write	Private
Gas Station	Public Read Only	Public Read Only
Supplier	Public Read Only	Public Read Only

Other Settings

- Standard Report Visibility:
- Manual User Record Sharing:
- Manager Groups:
- Secure guest user record access:
- Require permission to view record names in lookup fields:

Buttons:

- Save (highlighted)
- Cancel

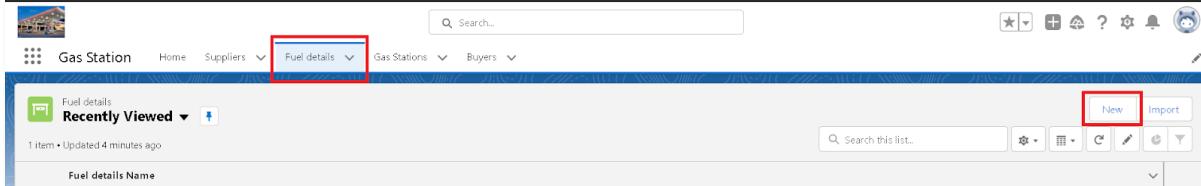
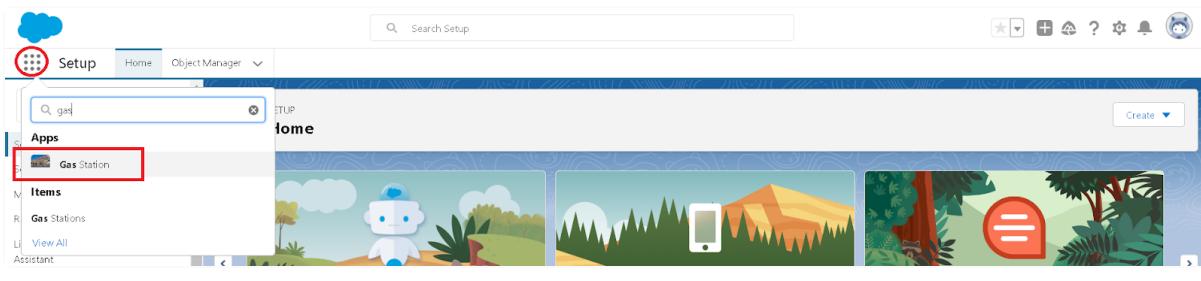
3. Click **save**.
4. Extra information, By these every profile has their own access, according to their profile.
5. But in our case we created a roles and given the roles in such a way that manager can see sales executive and sales person records , sales executive can see the sales person records

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...

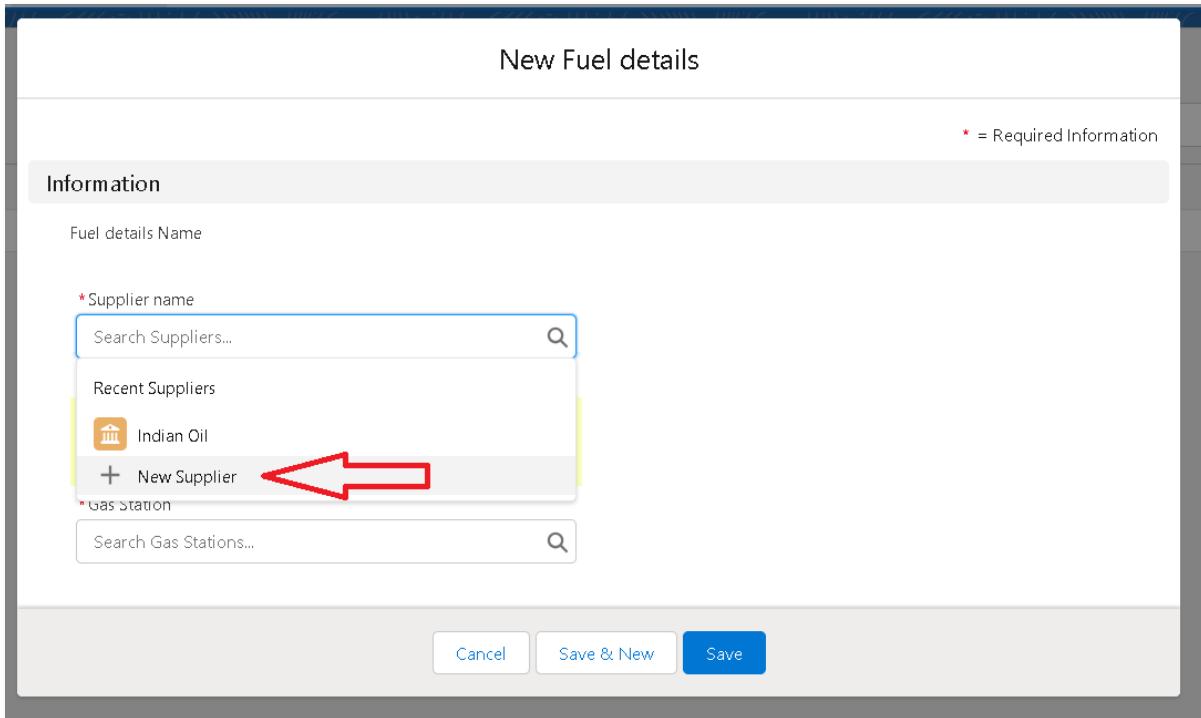
Recent Suppliers

Indian Oil 

+ New Supplier 

*Gas Station

Search Gas Stations...



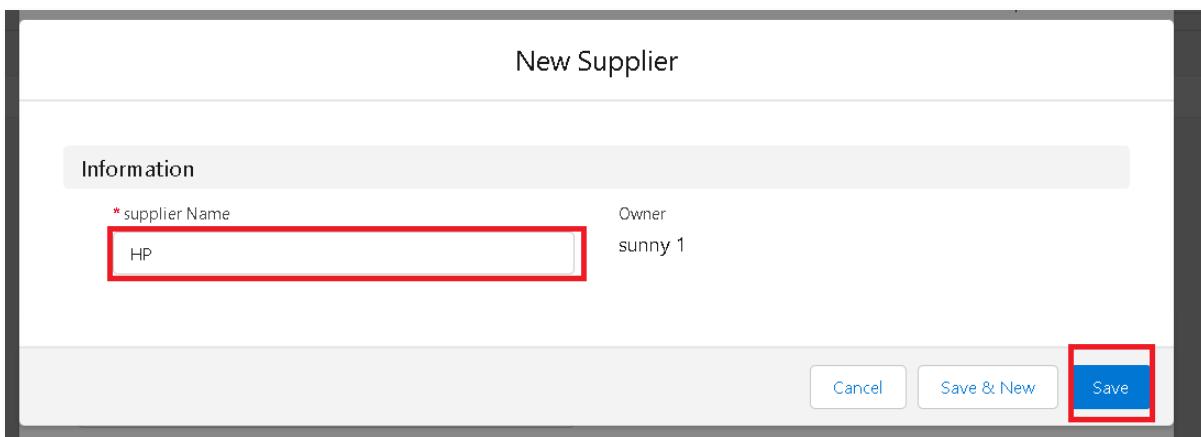
6. Fill the details in supplier record and click on **save**.

New Supplier

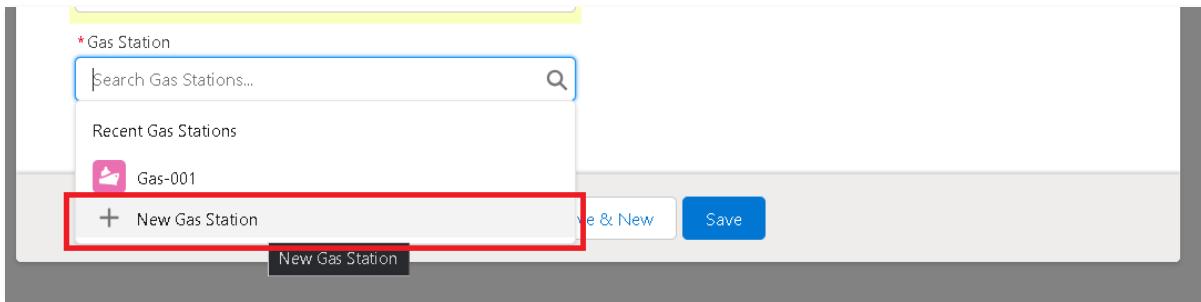
Information

*supplier Name 

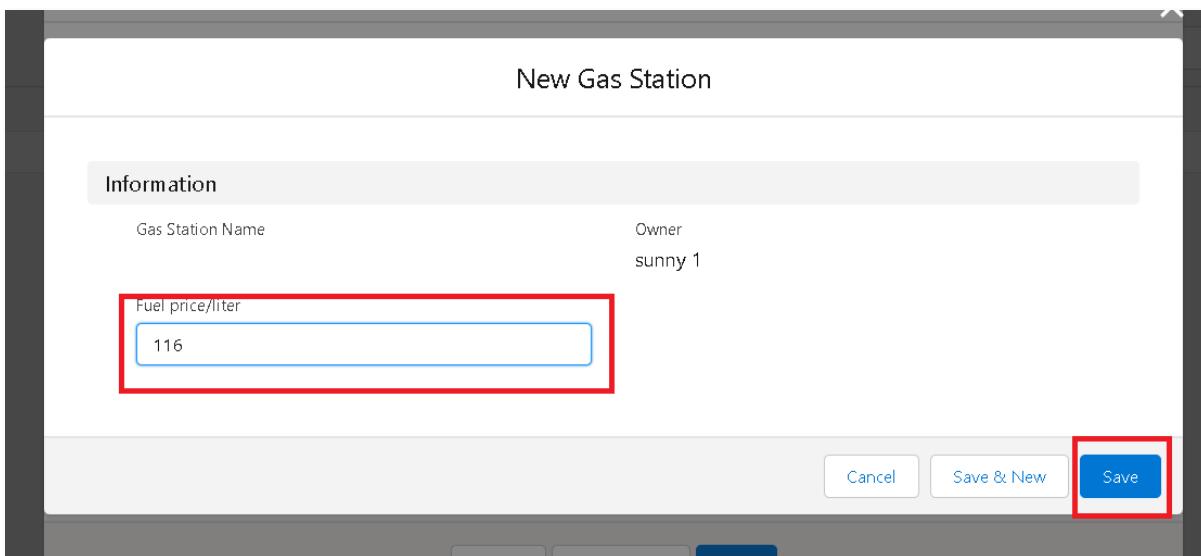
Owner sunny 1



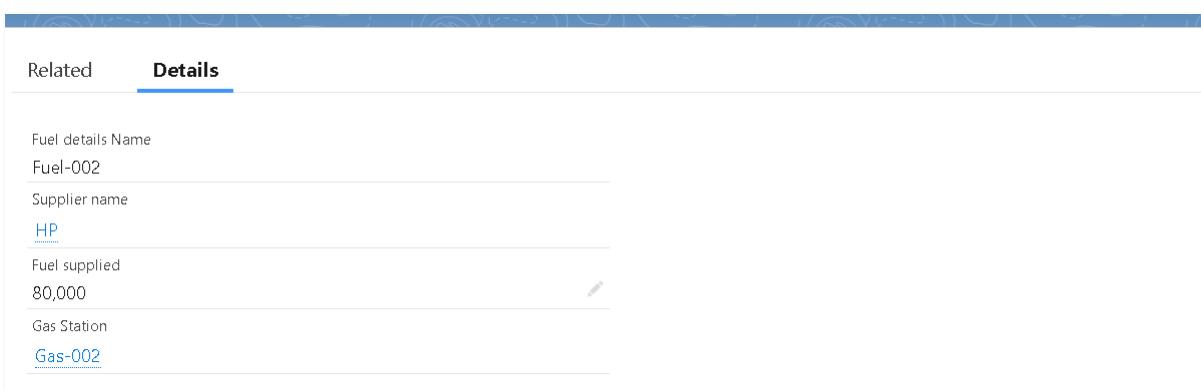
7. Creating the **Gas station record** in **fuel details record**, by clicking on **new gas station**.



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



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



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

View a record

To create a record in junction object follow these steps

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

The image consists of three vertically stacked screenshots of the Salesforce application interface.

Screenshot 1: Shows the Salesforce home page. A red box highlights the "Gas Station" app icon in the "Apps" section of the sidebar. The top navigation bar includes "Setup", "Home", and "Object Manager". The main content area displays three decorative cards: one with a robot, one with a smartphone, and one with a jungle scene.

Screenshot 2: Shows the "Fuel details" tab within the "Gas Station" object. A red box highlights the "Fuel details" tab in the top navigation bar. Below it, a red box highlights the "Fuel-002" record in the list view. The list view shows two items: "Fuel-002" and "Fuel-001". The top navigation bar also includes "Gas Station", "Suppliers", "Buyers", and "Gas Stations".

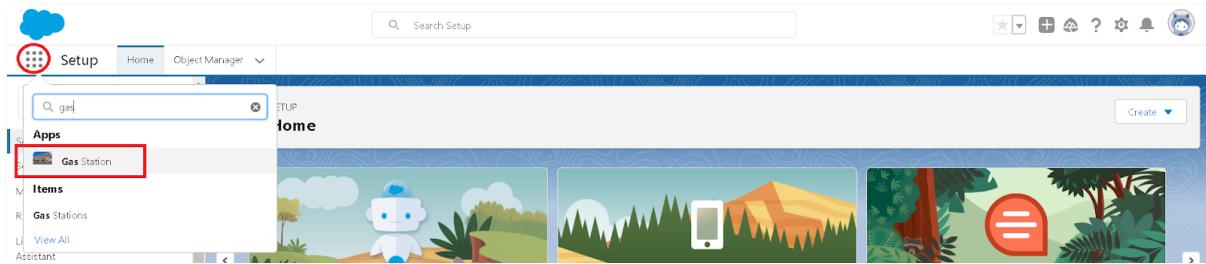
Screenshot 3: Shows the detailed view of the "Fuel-002" record. The top navigation bar includes "Gas Station", "Suppliers", "Buyers", and "Gas Stations". The main content area is titled "Details" and contains the following fields:

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

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

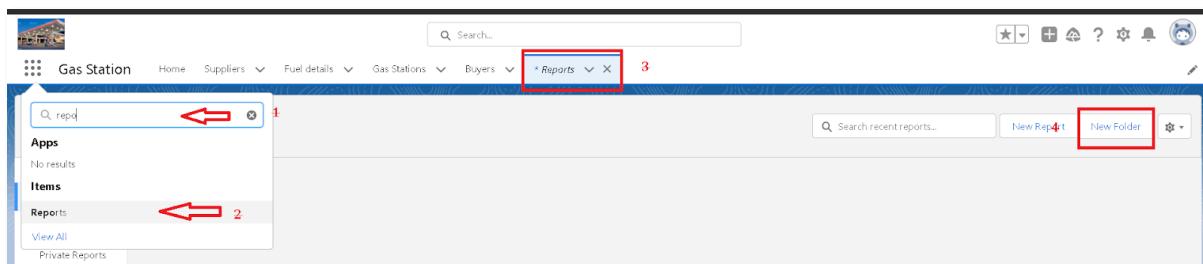
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

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
Fuel Estimation

* Folder Unique Name
FuelEstimation

Cancel Save

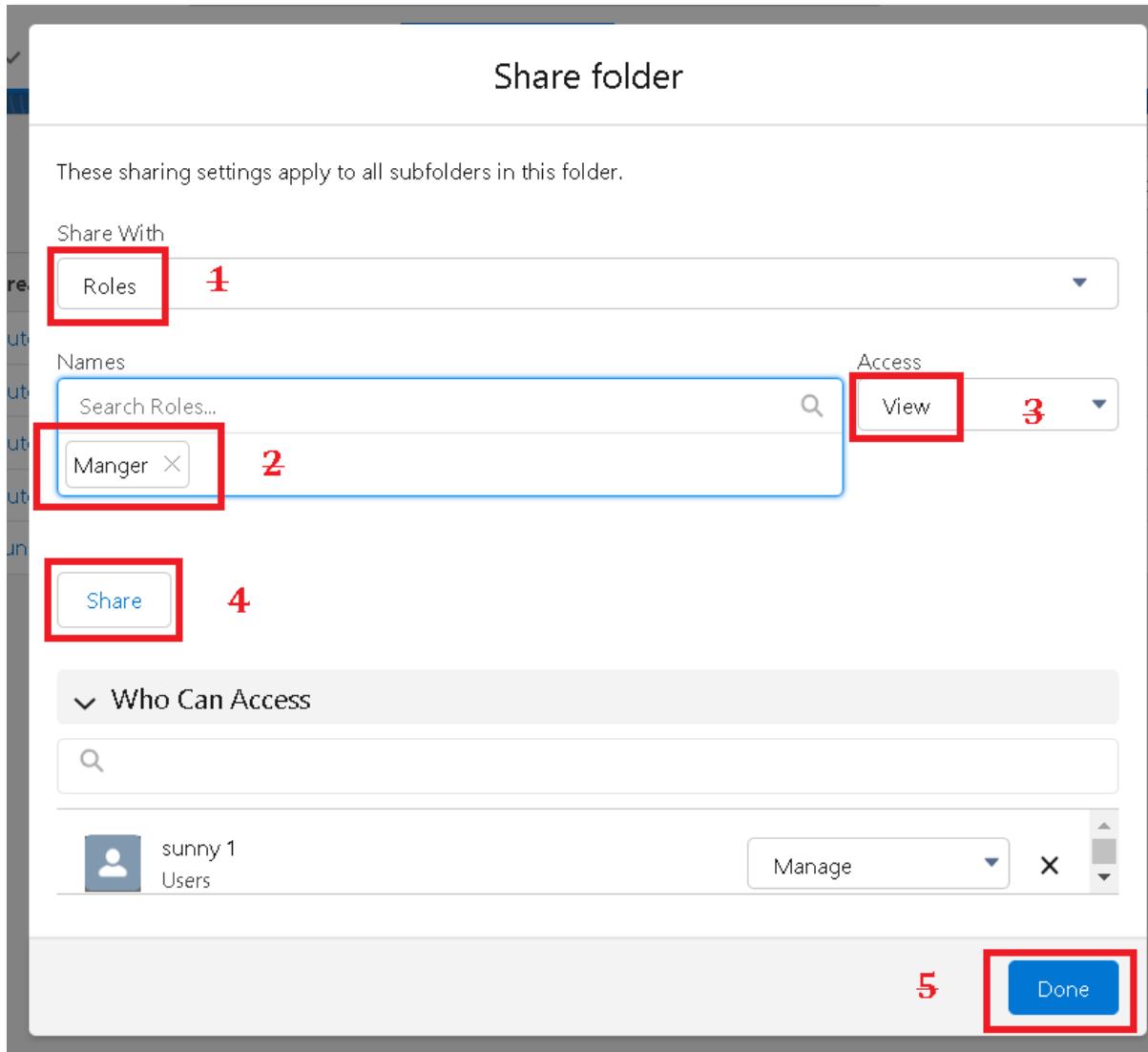
Sharing a report folder

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

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

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 has a red box around it), and Dashboards. Below this is a search bar labeled 'Search...'. On the left, there's a sidebar with 'Reports' and 'Recent' sections, followed by 'Folders' with categories: Recent, Created by Me, Private Reports, Public Reports, and All Reports. The main area shows a table of reports with columns: 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. 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. In the center, there's a search bar with 'gas' typed in, and a list of report types: Suppliers with Fuel details and Gas Stations, Gas Stations, and Gas Stations with Buyers (which is highlighted with a red box). On the right, there's a 'Details' pane for 'Gas Stations with Buyers' (Standard Report Type). It includes a 'Start Report' button (highlighted with a red box), a 'Fields (32)' section, and sections for 'Created By You' and 'Created By Others'.

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 x
- GROUP COLUMNS
 - Add group...

Columns

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

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
	naruto uzumaki	50	₹4,800.00
	Subtotal		₹2,19,072.00
	Total (7)	2,282	₹2,19,072.00

Row Counts Detail Rows Subtotals Grand Total

Update Preview Automatically Run

3 Conditional Formatting

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

Conditional Formatting Rules

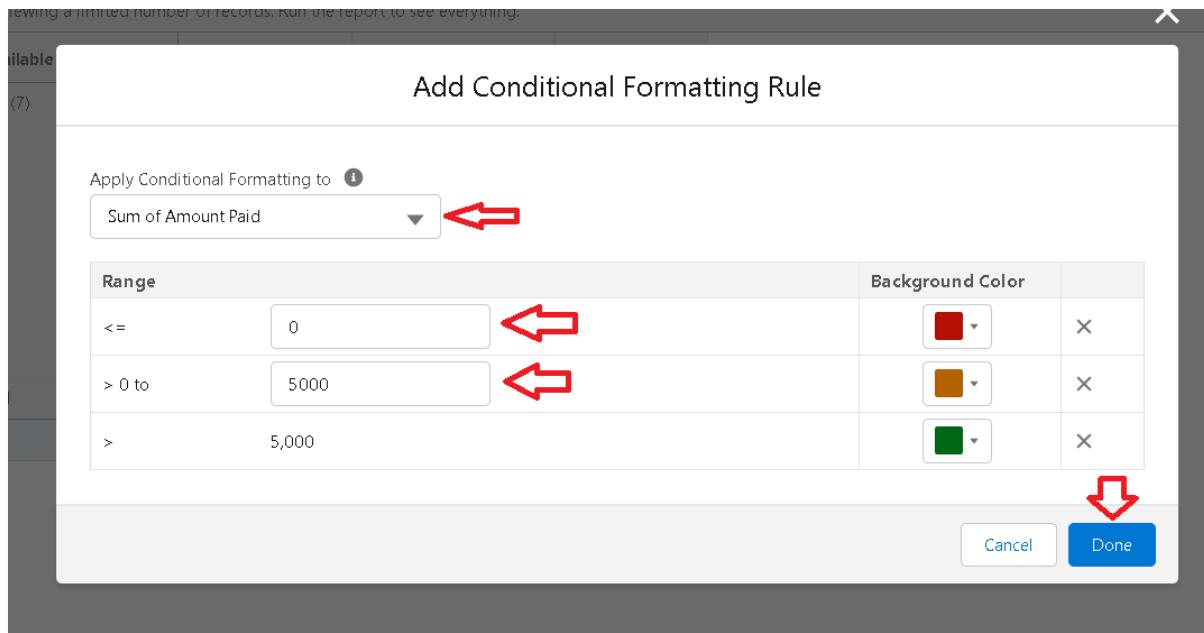


No Conditional Formatting Rules Created

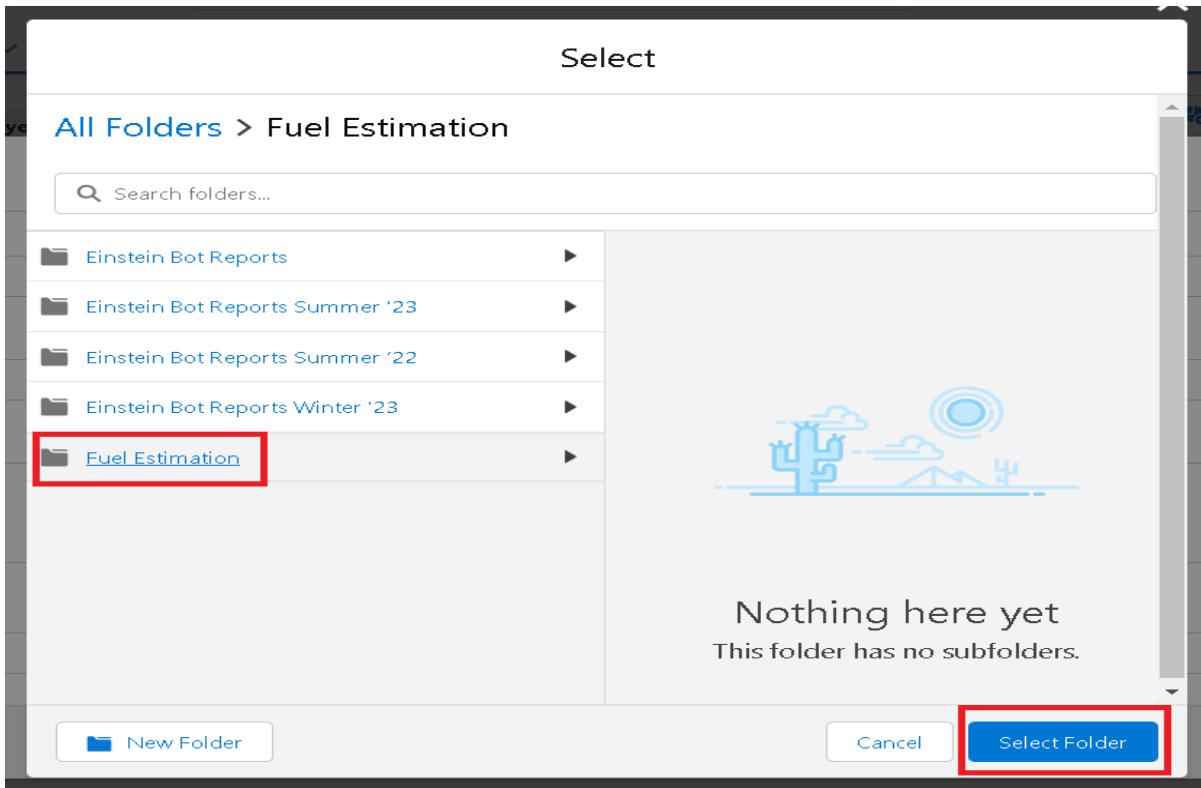
Add Conditional Formatting Rule

Cancel Apply

9. Change the **apply conditional formatting** to “ **sum of Amount paid** ”.
10. Mention the **range** from “ **1000 to 5000** ”.
11. Dont change the colours, and click on **Done**.
12. Click **apply**.



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



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

Report: Gas Stations with Buyers
Amount range

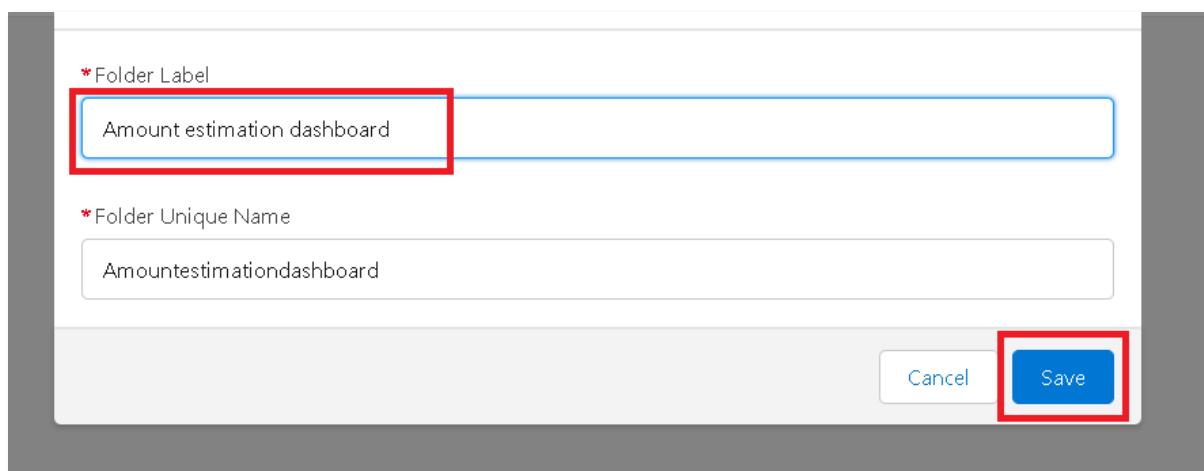
Total Records	Total Fuel filled in vehicle	Total Amount Paid					
7	2,282	₹2,19,072.00					
Customer name ↑ ↓	Fuel Available in bunk ↑ ↓	Fuel filled in vehicle ↓	Amount Paid ↑ ↓				
bunny g (1)	2,718.00 (1)	15	₹1,440.00				
	Subtotal	15	₹1,440.00				
Subtotal		15	₹1,440.00				
drug dealer (1)	2,718.00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

14. Dashboards

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

Create Dashboard Folder

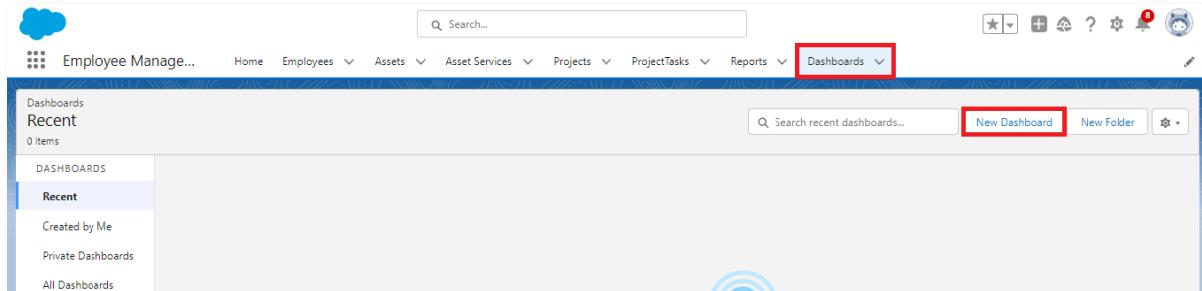
1. Click on the **app launcher** and search for **dashboard**.
2. Click on **dashboard tab**.
3. Click **new folder**, give the folder label as "**Amount estimation dashboard**".
4. Folder unique name will be auto populated.
5. Click **save**.



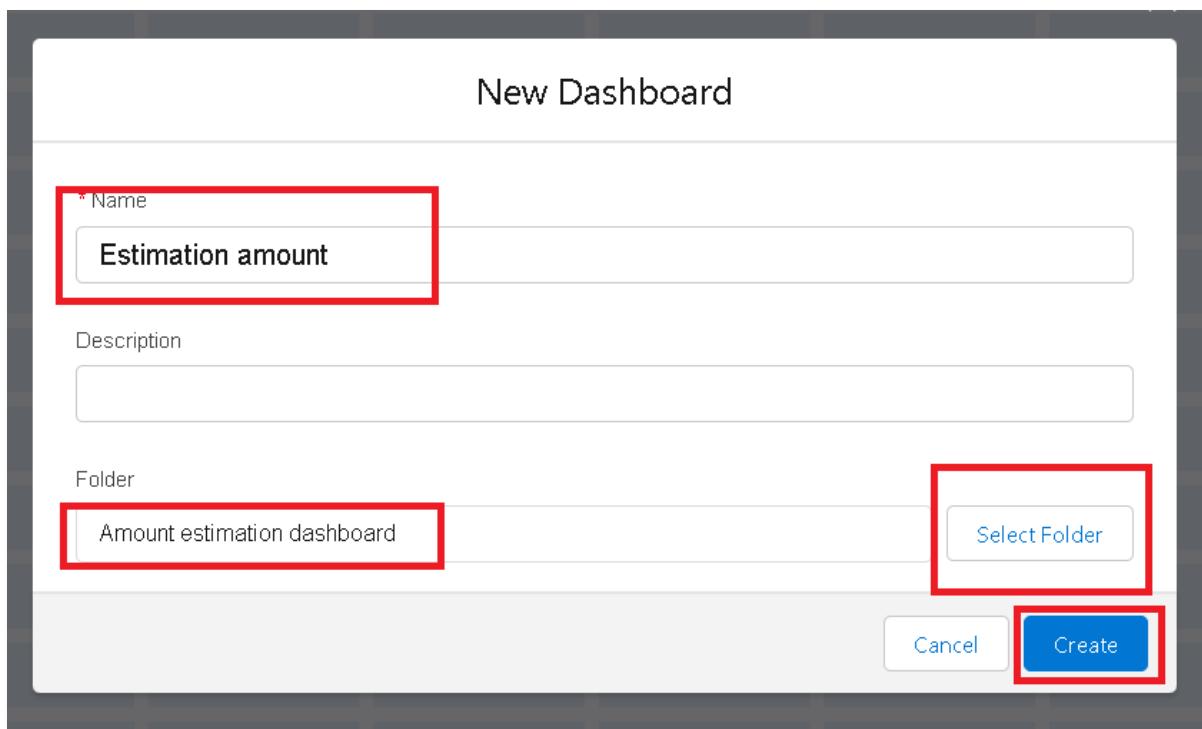
6. Follow the same steps, from milestone 12, and activity 2, and provide the **sharing settings** for the folder that just created.

Create Dashboard

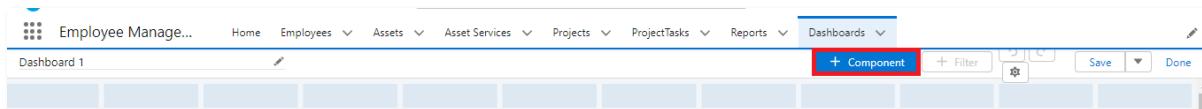
1. Go to the **app** ? click on the **Dashboards tabs**.



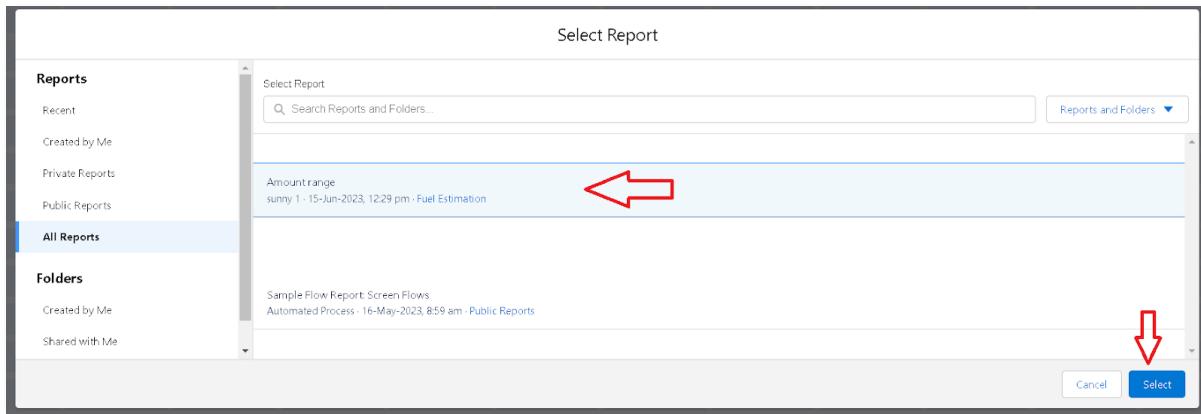
2. Give a **Name** and **select the folder** that created, and click on **create**.



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**.

The screenshot shows the Salesforce Setup interface. In the top left, there's a search bar with 'Q, flows' and a 'Setup' button. Below it, a sidebar has 'Process Automation' expanded, with 'Flows' highlighted (labeled 2). The main content area is titled 'SETUP Flows' and shows a table of 'Flow Definitions'. A red box labeled 1 surrounds the search bar. A red box labeled 2 surrounds the 'Flows' link in the sidebar. A red box labeled 3 surrounds the 'New Flow' button in the top right of the main area.

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

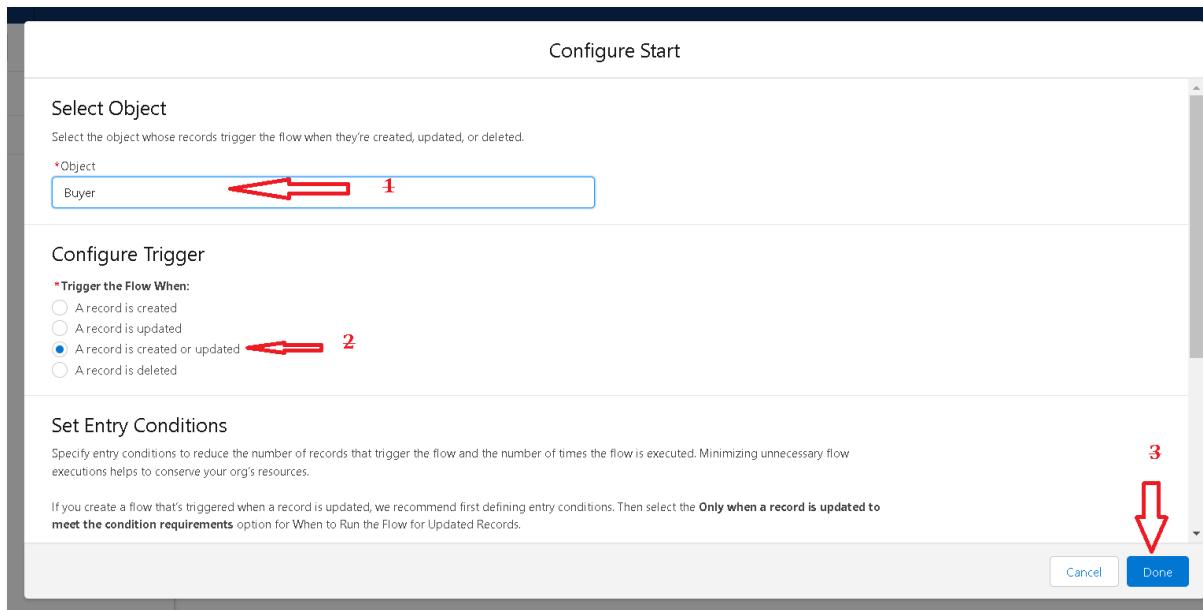
The screenshot shows the 'New Flow' creation page. At the top, it says 'New Flow'. Below that, the 'Core' tab is selected. The page lists several flow types:

- Screen Flow**: Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.
- Record-Triggered Flow**: (highlighted with a red box labeled 1) Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
- Schedule-Triggered Flow**: Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.
- Platform Event—Triggered Flow**: Launches when a platform event message is received. This autolaunched flow runs in the background.
- Autolaunched Flow (No Trigger)**: Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.
- Record-Triggered Orchestration**: Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.

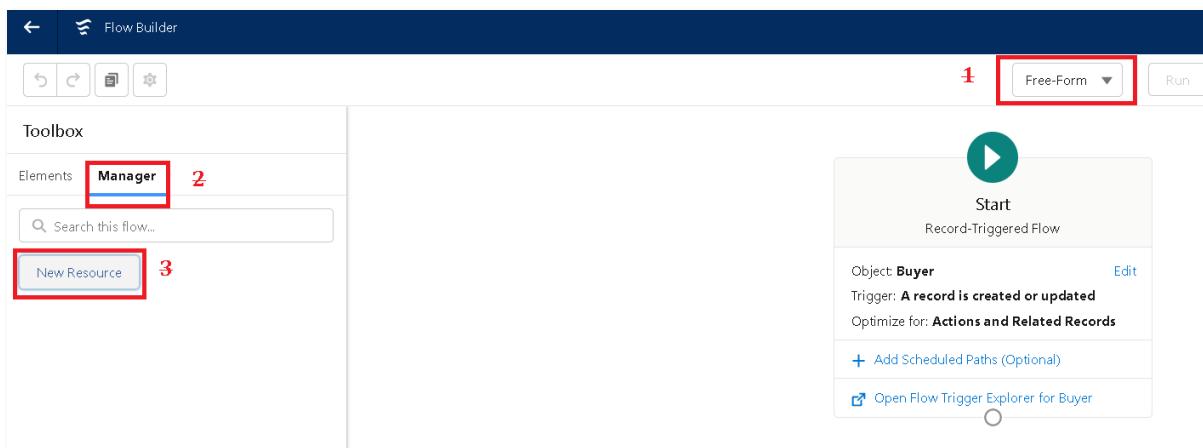
At the bottom right, a red box labeled 2 surrounds the 'Create' button.

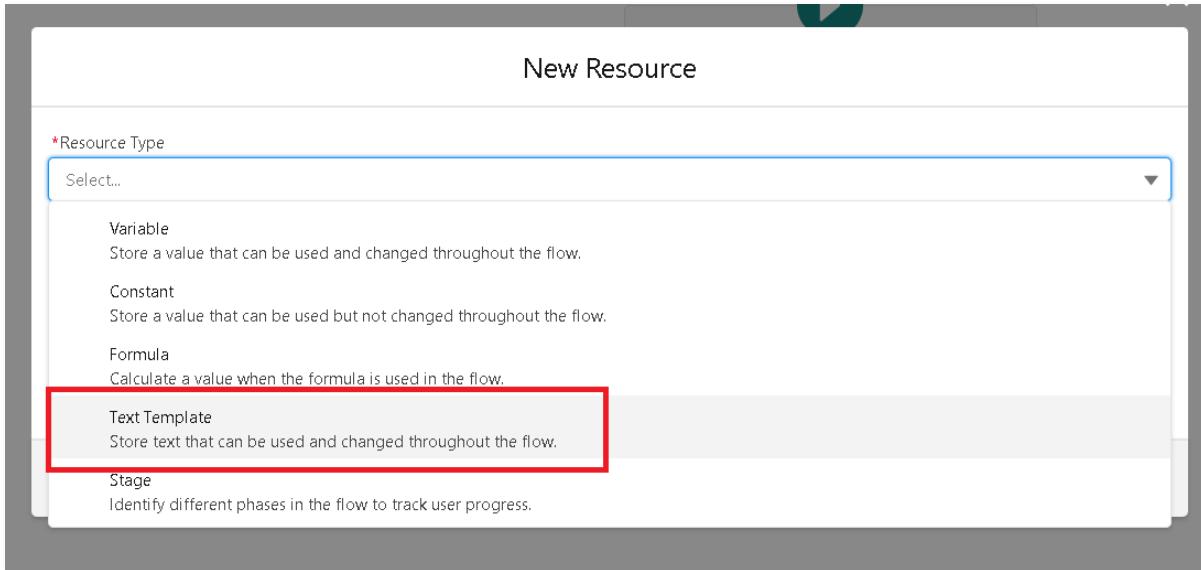
3. Select the **Object** as a “**buyer**” in the **Drop down** list.
4. Select the **Trigger Flow when: “A record is Created or Updated”**.

5. Select the **Optimize the flow for: “Actions and Related Records”** and Click on **Done**.



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





9. Enter the **API name** as "**emailbody**".

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

Hello {!\$Record.Customer_name_c},

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

RECEIPT DETAILS :

Customer name : {!\$Record.Customer_name_c}

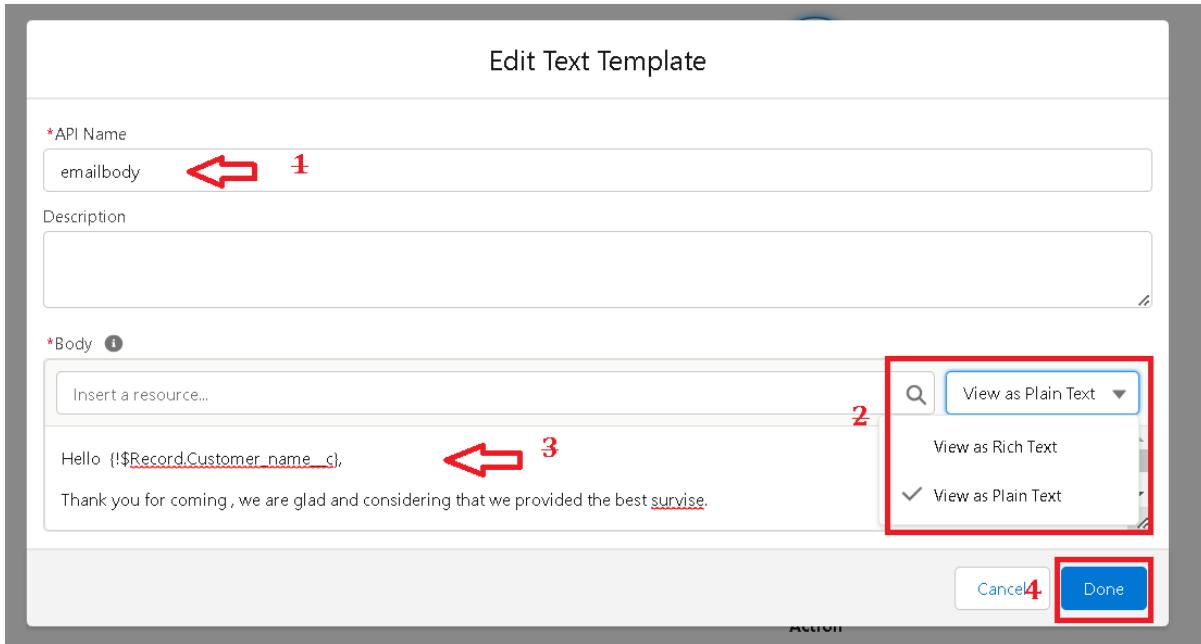
Amount paid by Customer : {!\$Record.Amount_Paid_c}

Vehicle type : {!\$Record.Vehicle_type_c}

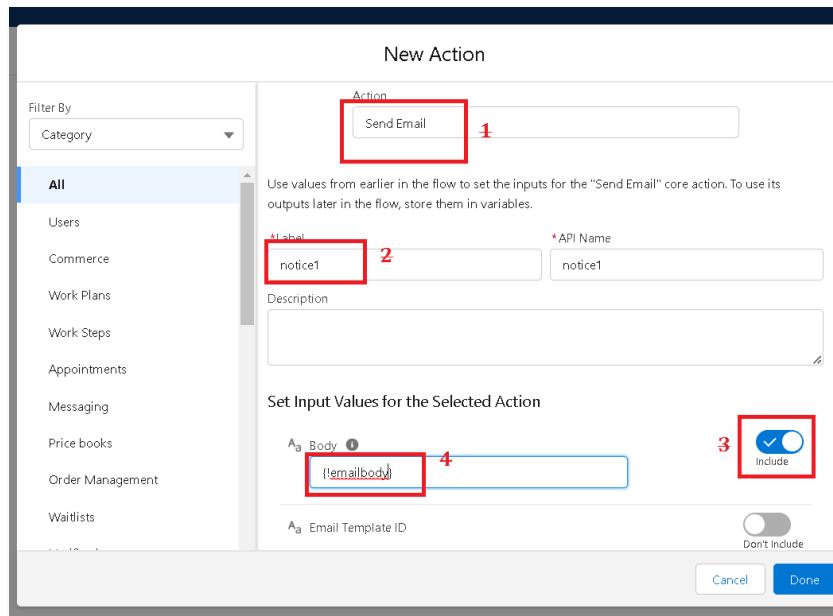
Fuel intake in vehicle : {!\$Record.Fuel_filled_in_vehicle_c}

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

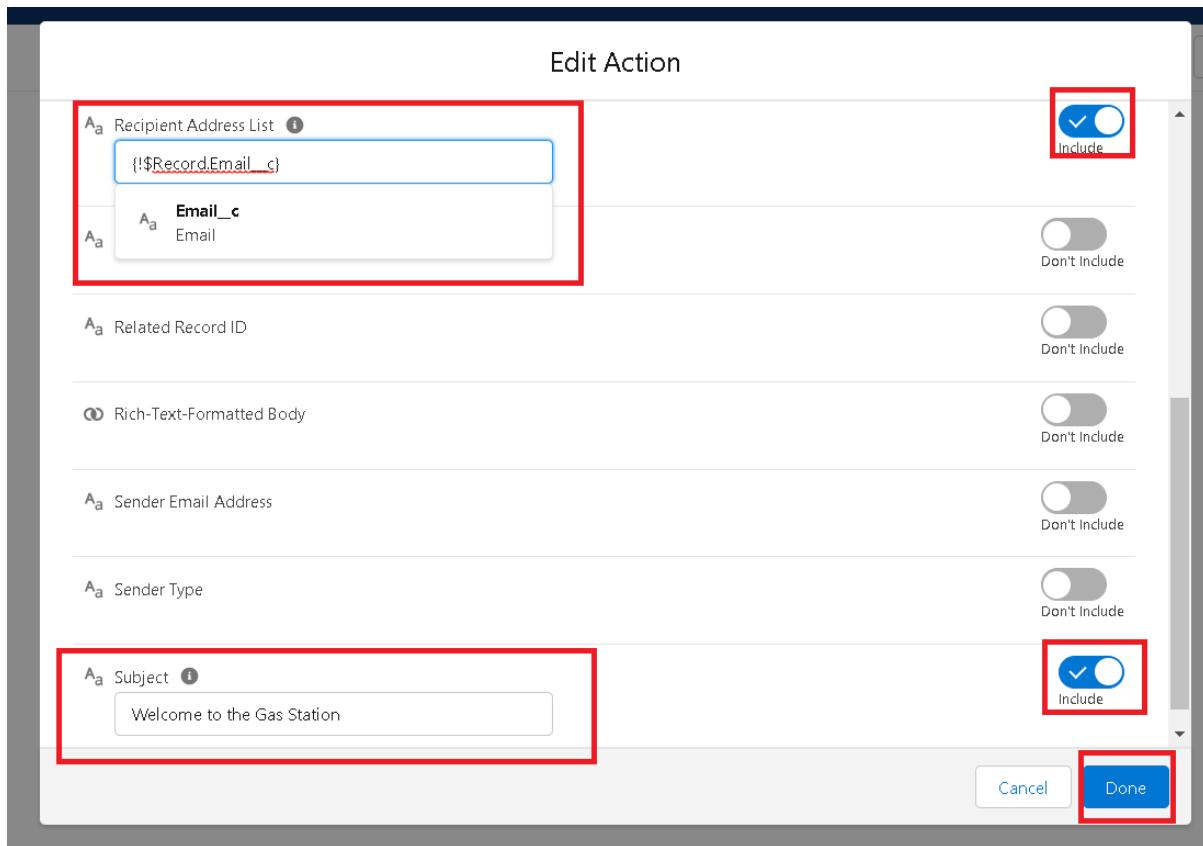
12. Click **done**.



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



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



22. Now **drag the path** from the start to action element.
23. Click on **save**. Give the **Flow label**, **Flow Api name** will be autopopulated.
24. And click **save**, and click on **activate**.

Save the flow

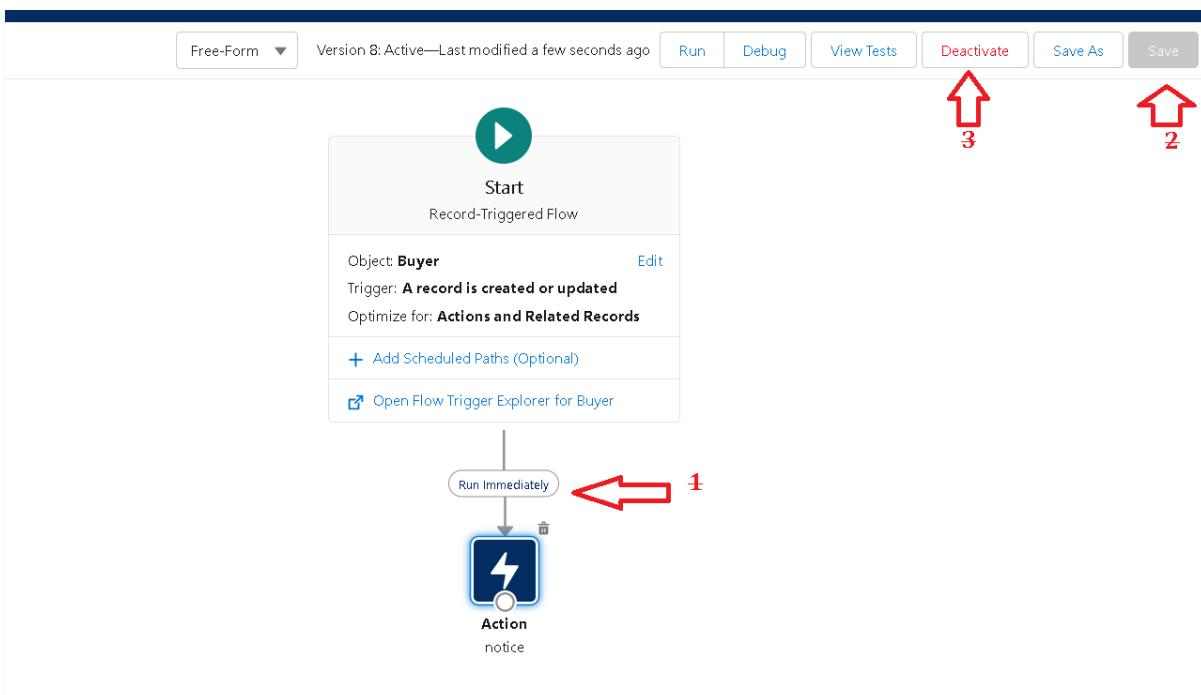
*Flow Label *

*Flow API Name

Description

Show Advanced

Cancel Save



Thank you