**Gas Filling Station Salesforce Project**

Krishna Thrishagna

**Project Overview**

The Gas Filling Station Salesforce CRM project is designed to streamline and automate the operations of a fuel station, including customer management, fuel sales tracking, and invoice generation. The CRM allows the station to monitor fuel sales, manage customer accounts, record transactions, and generate reports and dashboards for business insights. The solution leverages Salesforce standard and custom objects, validation rules, approval processes, and automation flows to ensure efficient operation and accurate record-keeping.

**Objectives**

The main objectives of the Gas Filling Station Salesforce CRM are:

1.To maintain a centralized database of customers and their fuel purchases.

2.To automate the fuel booking and sales process using custom objects and flows.

3.To generate real-time reports and dashboards for fuel sales and revenue tracking.

4.To implement secure access control for employees using profiles and permissionsets.

5.To ensure smooth data migration, testing, and system maintenance for long-term scalability.

**Phase 1: Requirement Analysis & Planning**

• Understanding Business Requirements:   
  - Identify the need to track customers, vehicles, fuel purchases, and payments.  
  - Requirement to generate automated invoices and track daily fuel sales.  
• Defining Project Scope and Objectives:   
  - The CRM will cover customer management, fuel booking, automated approval, and reporting.  
• Designing Data Model and Security Model:  
  - Custom objects like Fuel\_Filled\_in\_Vehicle\_\_c, Gas\_Station\_\_c, and Payment\_\_c.  
  - Relationships defined with lookup and master-detail fields.  
  - Security implemented via profiles, roles, and sharing rules

**Phase 2: Salesforce Development - Backend & Configurations**

• Environment Setup & DevOps Workflow:  
  - Sandbox and Developer org used for development and testing.  
• Customizations:  
  - Created custom objects, fields, and relationships for Fuel Tracking.  
  - Implemented validation rules for fuel quantity and payment status.  
  - Developed automation using Process Builder, Flows, and Workflow Rules.  
• Apex Development:  
  - Created triggers for automatic record updates (e.g., total fuel consumption).  
  - Used asynchronous Apex for bulk data processing when required.

**Phase 3: UI/UX Development & Customization**

• Created a Lightning App 'Gas Station Management' accessible via App Launcher.  
• Configured page layouts, dynamic forms, and record pages for custom objects.  
• Developed reports and dashboards for:  
   - Daily Fuel Sales  
   - Revenue per Gas Station  
   - Customer-wise Fuel Consumption  
• Designed Lightning Pages with quick actions for booking creation.  
• Implemented user management with profiles and permission sets.

**Phase 4: Data Migration, Testing & Security**

• Data Migration:  
  - Used Data Loader to migrate customer, vehicle, and fuel transaction data.  
• Testing:  
  - Created test classes for Apex triggers and automation.  
  - Performed functional testing for flows, approvals, and booking creation.  
• Security:  
  - Implemented profiles, roles, and sharing rules.  
  - Enabled field history tracking for critical objects.  
  - Applied duplicate and matching rules for customer records.

**Phase 5: Deployment, Documentation & Maintenance**

• Deployment:  
  - Used Change Sets for deploying metadata from Sandbox to Production.  
• Maintenance:  
  - Regular monitoring with debug logs and scheduled reports.  
  - Troubleshooting with field history tracking and error logs.  
• Documentation:  
  - Maintained detailed project documentation with screenshots and flow diagrams.

**Reports & Dashboards**

Key reports and dashboards include:  
1. Daily Fuel Sales Report  
2. Revenue by Gas Station  
3. Customer-wise Consumption Dashboard  
4. Monthly Revenue Trends  
5. Vehicle-wise Fuel Tracking

**Future Enhancements**

• Implement AI-based fuel consumption prediction.  
• Add Chatbot integration for customer queries.  
• Integrate IoT-based sensors for automatic fuel entry.  
• Mobile app access for real-time tracking.

**Conclusion**

The Gas Filling Station Salesforce CRM successfully automates customer management, fuel sales tracking, and reporting. It enhances operational efficiency, ensures secure data handling, and provides real-time insights to decision-makers. The system is scalable for future enhancements like AI and IoT integration.