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

by

MARISARLA LOHITH

lohithbujji915@gmail.com

PROJECT ABSTRACT

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

Features and Functionality:

1. User Management

- **Admin Dashboard**: Centralized view for monitoring all activities and operations within the gas
station.
- **User Roles and Permissions**: Different roles such as Admin, Manager, Cashier, and Attendant,
with specific permissions to ensure data security and proper workflow.

2. Customer Management

- **Customer Profiles**: Detailed customer profiles with contact information, vehicle details, fuel
preferences, and purchase history.
- **Loyalty Programs**: Points or rewards system to encourage repeat business. Integration with
CRM to track customer loyalty and reward points.
- **Notifications**: Automated SMS or email notifications for promotions, loyalty rewards, or service
reminders.

3. Inventory Management

- **Real-Time Inventory Tracking**: Monitor fuel levels, lubricants, and other retail items in real-time.
- **Stock Alerts**: Automated alerts when inventory levels are low or when certain items need to be reordered.
- **Supplier Management**: Track supplier details, order history, and manage purchase orders.

4. Sales and Billing

- **Point of Sale (POS) Integration**: Seamless integration with POS systems to capture sales data directly into the CRM.
- **Invoicing and Receipts**: Generate digital invoices and receipts for customers, with options for email or SMS delivery.
- **Sales Reporting**: Detailed sales reports, including daily, weekly, and monthly summaries,.

5. Employee Management

- **Shift Scheduling**: Manage employee shifts, track attendance, and monitor performance.
- **Task Management**: Assign tasks to employees and track completion status.
- **Performance Metrics**: Monitor employee performance metrics such as sales targets, customer service ratings, and more.

6. Maintenance Management

- **Equipment Maintenance Scheduling**: Schedule regular maintenance for gas pumps and other equipment.
- **Service History**: Keep track of all maintenance and repairs performed, including service provider details and costs.

7. Analytics and Reporting

 Customizable Dashboards: Visualize key metrics such as sales, inventory levels, customer data,
and employee performance.
 Reports: Generate detailed reports on sales, customer behavior, inventory turnover, employee
performance, and more.
 Predictive Analytics: Use historical data to forecast future sales trends and inventory needs.

8. Security and Compliance

 Data Security: Ensure all customer and transaction data is encrypted and securely stored.
 Compliance Tracking: Monitor compliance with industry regulations and standards, including
environmental regulations for fuel storage.

9. Marketing and Promotions

 Campaign Management: Create and manage marketing campaigns, promotions, and discounts.
 Targeted Marketing: Use customer data to create targeted marketing campaigns based on fuel
preferences, vehicle types, or purchase history.

10. Integration with Other Systems

 Fuel Management Systems: Integrate with existing fuel management systems for real-time data
exchange.
 Payment Gateways: Secure integration with multiple payment gateways to accept various
payment methods, including credit/debit cards, mobile payments, etc.
 Fleet Management: Integration with fleet management software to handle corporate accounts
and bulk fuel purchases.

11. Mobile Application

 Admin Mobile App: Access the CRM system via a mobile app for on-

the-go management and
real-time updates.

 Customer Mobile App: Offer a mobile app for customers to view promotions, track loyalty points, and make payments.

12. Feedback and Support

 Customer Feedback: Collect customer feedback through surveys and ratings to improve service quality.

 Support Tickets: Manage customer support tickets directly through the CRM for prompt
resolution of issues.

MILESTONE-1:SALESFORCE

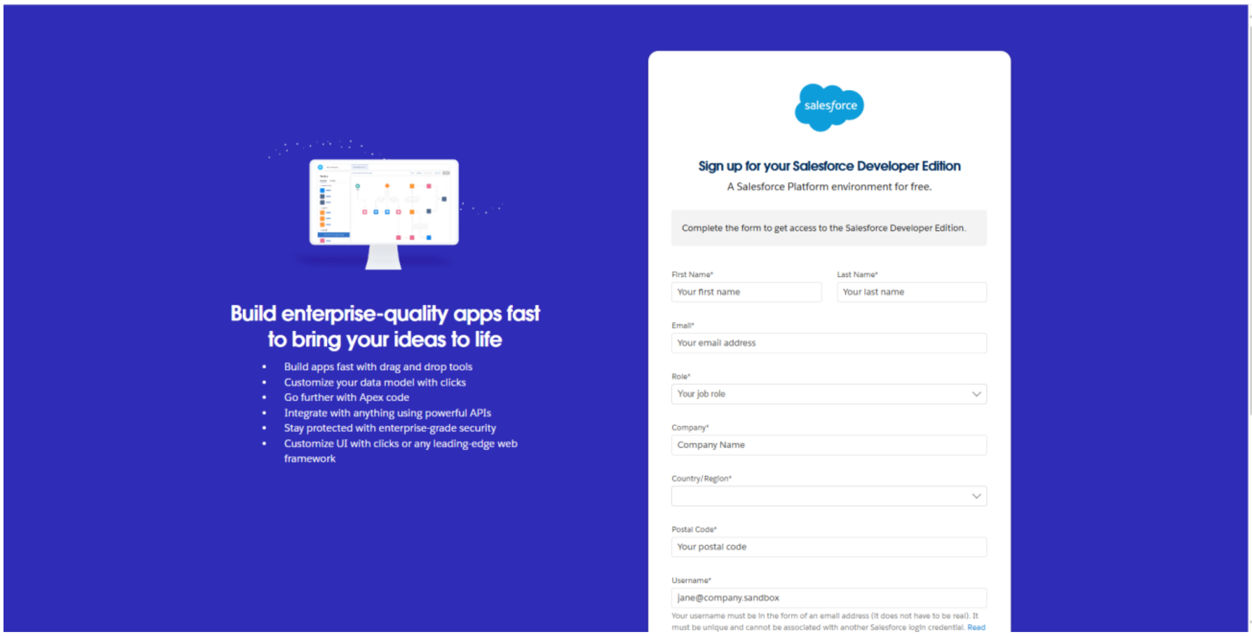
What is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere.
Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

Activity 1: Creating Developer Account:

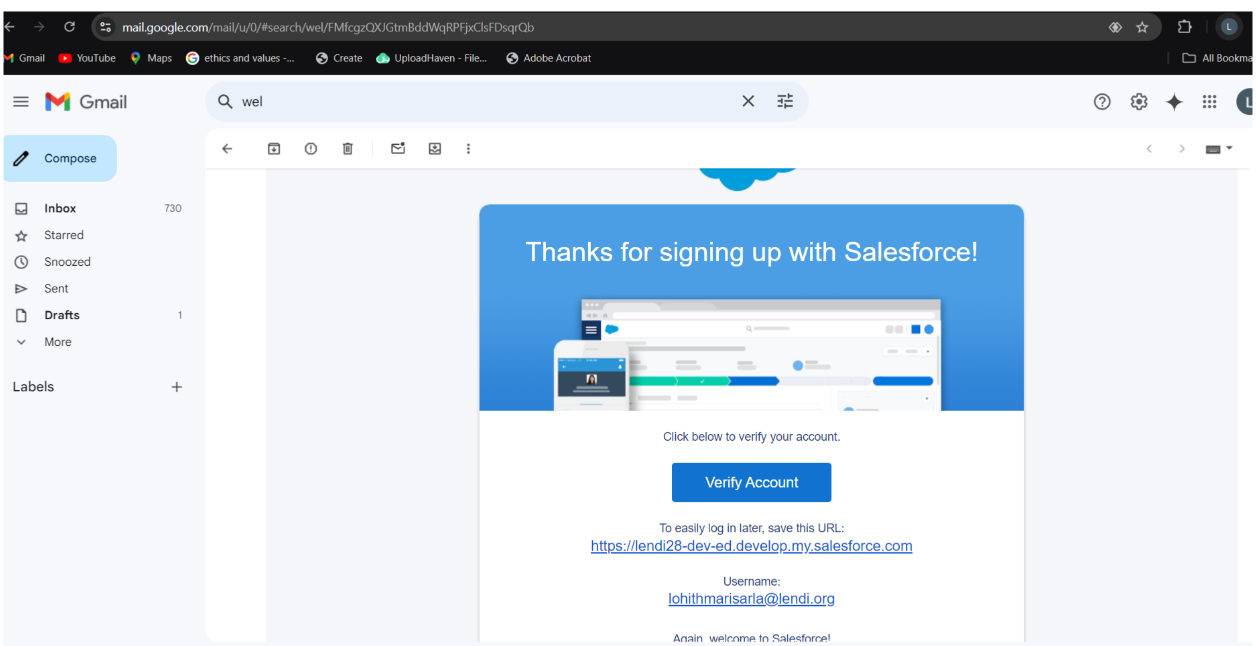
Creating a developer org in salesforce.
1. Go to https://developer.salesforce.com/signup
   - First name & Last name
   - Email
   - Role : Developer
   - Company : College Name
   - County : India
   - Postal Code : pin code

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.



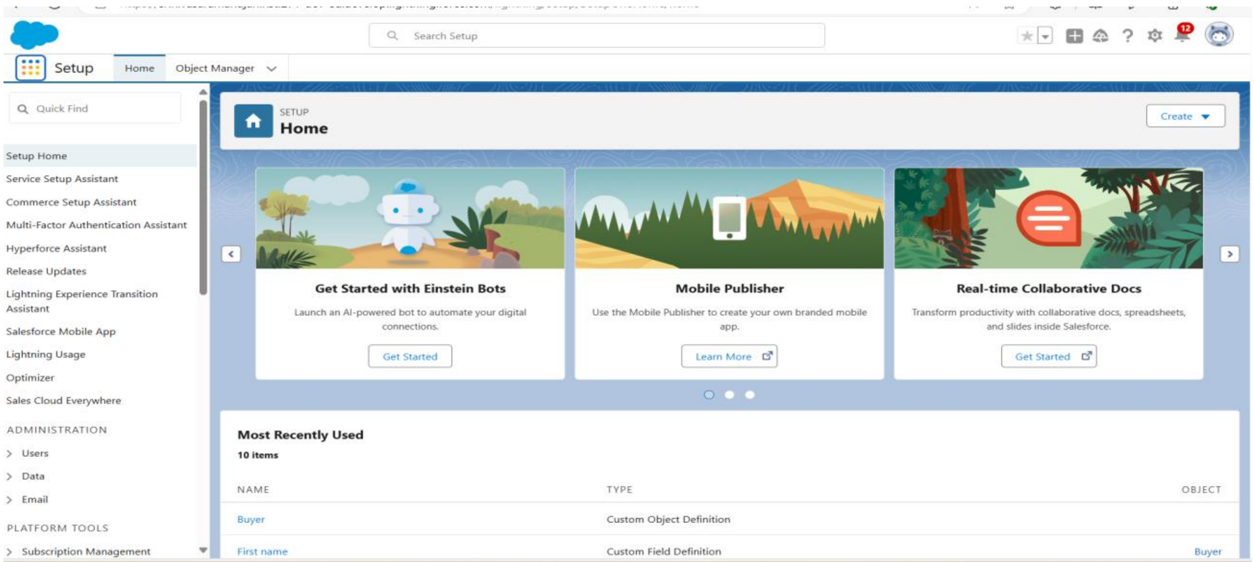
Activity 2: Account Activation:Milestone 2 – Object

- Go to inbox,and click on verify account and give Strong password



and then save this.

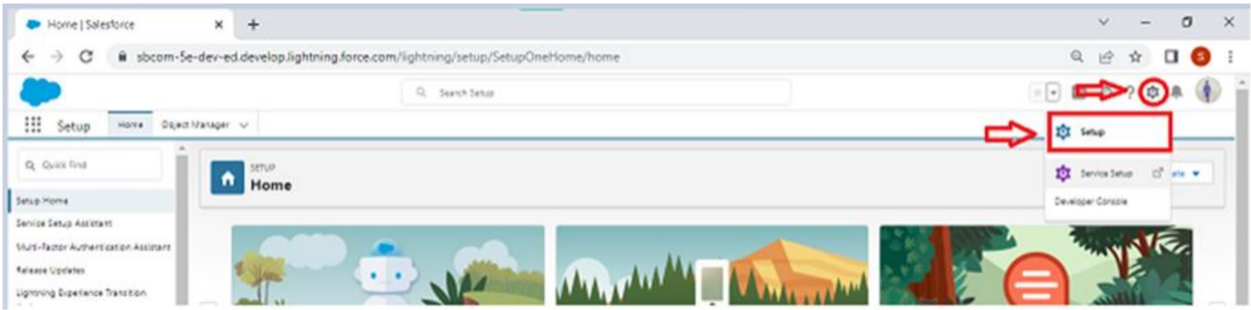
- Then the salesforce homepage appears.



MILESTONE-2:OBJECT

What Is an Object?

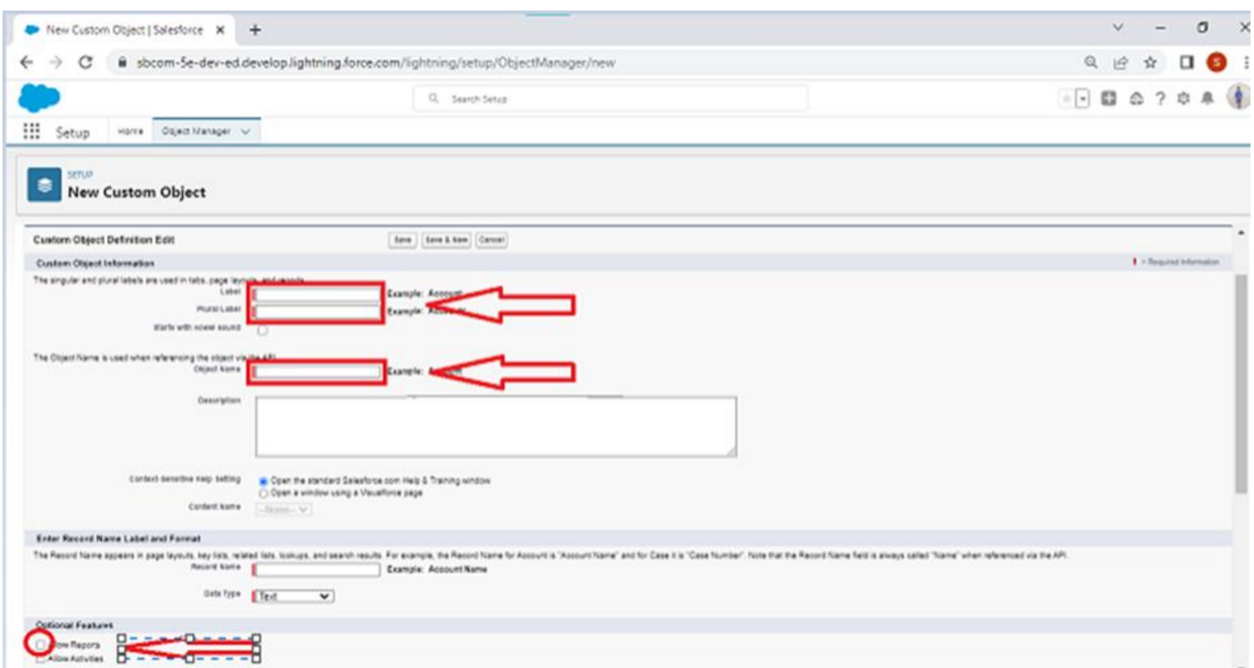
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects?
Salesforce objects are of two types:
1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are objects created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a data-sharing structure.
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 the Custom object defining page:
3. Enter the label name, and plural label name, click on Allow reports, and Allow search.

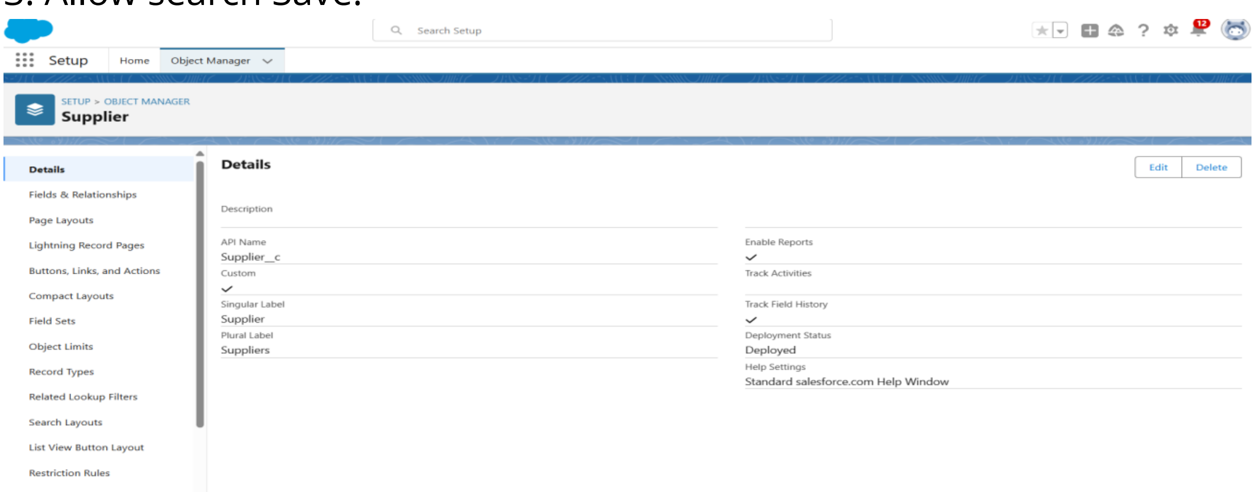


4. Click on Save.

Activity 1: Create Supplier Object:

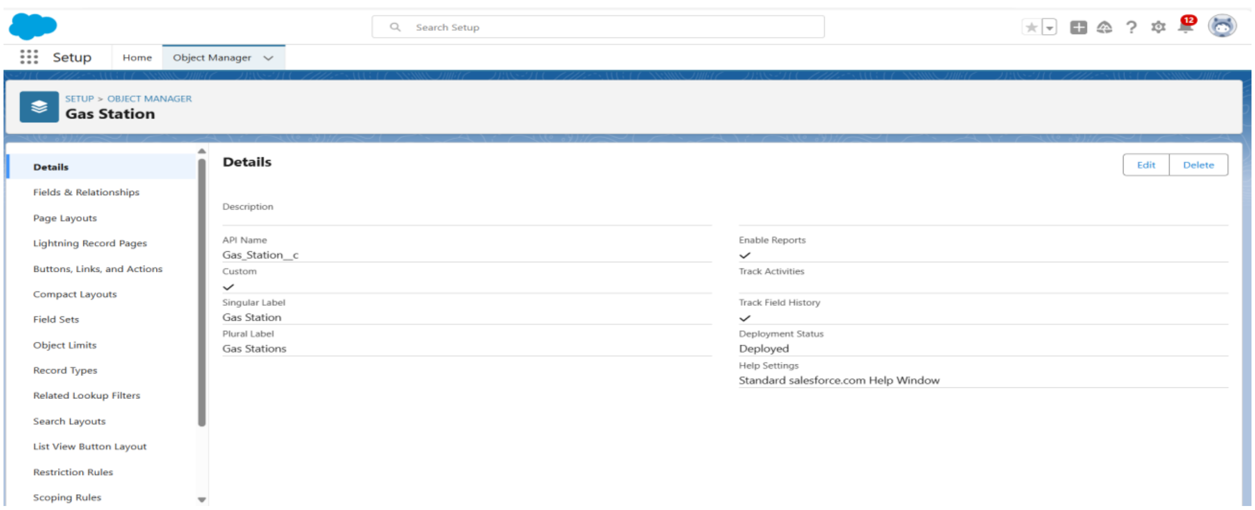
To create an object:

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.



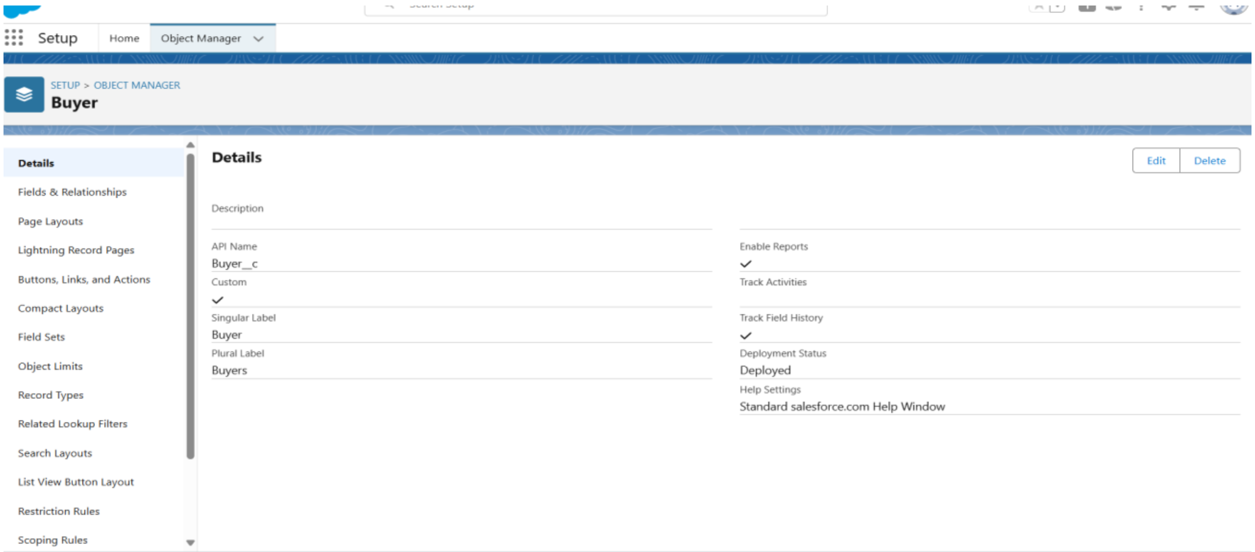
Activity 2: Create Gas Station Object

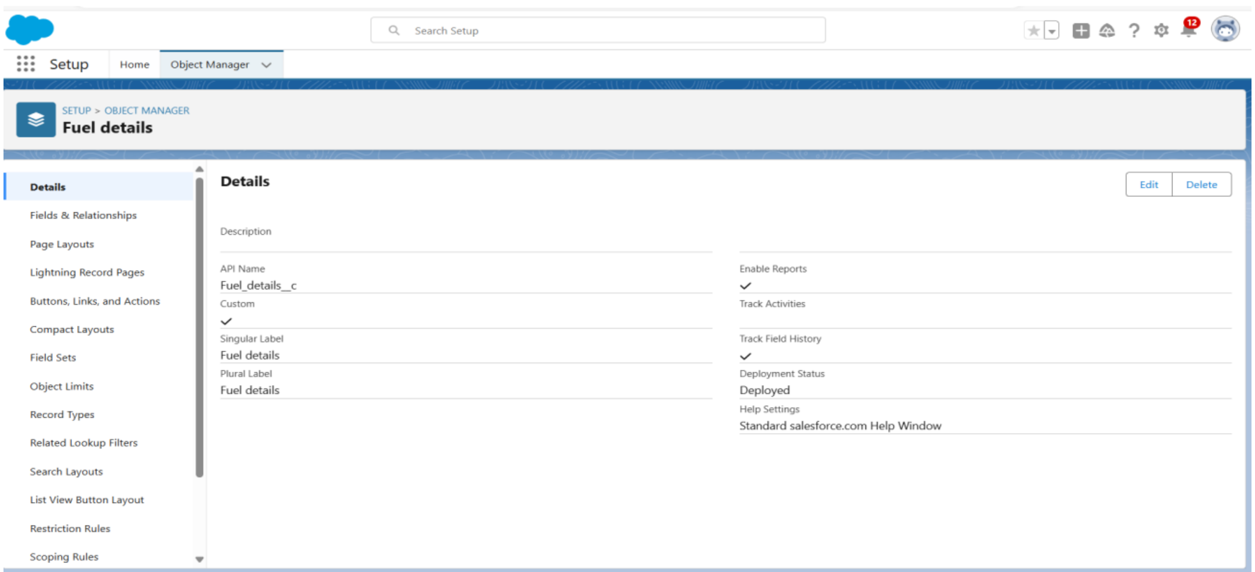
- To create an object:
- From the setup page ? Click on Object Manager ? Click on Create ? Click on Custom Object.
- Enter the label name? Gas Station
- Plural label name? Gas Stations
- Enter Record Name Label and Format
- Record Name ? Gas Station
- Data Type ? Auto Number
- Display Format ? Gas-{000}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



Activity 3: Create Buyer and Fuel details Objects

- Use these display format for the Buyer
- label name ? Buyer
- Plural label name ? Buyers
- Display Format ? Buyer-{000}
- Starting number ? 1
- same steps are followed for creation of Fuel Details object





MILESTONE-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.

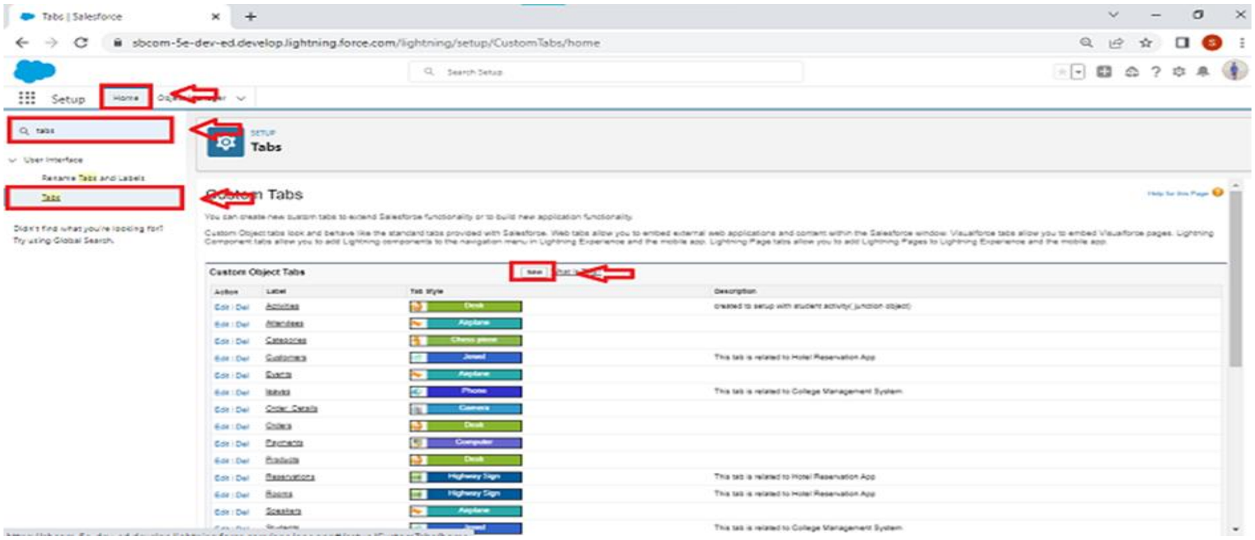
Types of Tabs:

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.

Activity 1: Creating a Custom Tab

To create a Tab:(supplier)

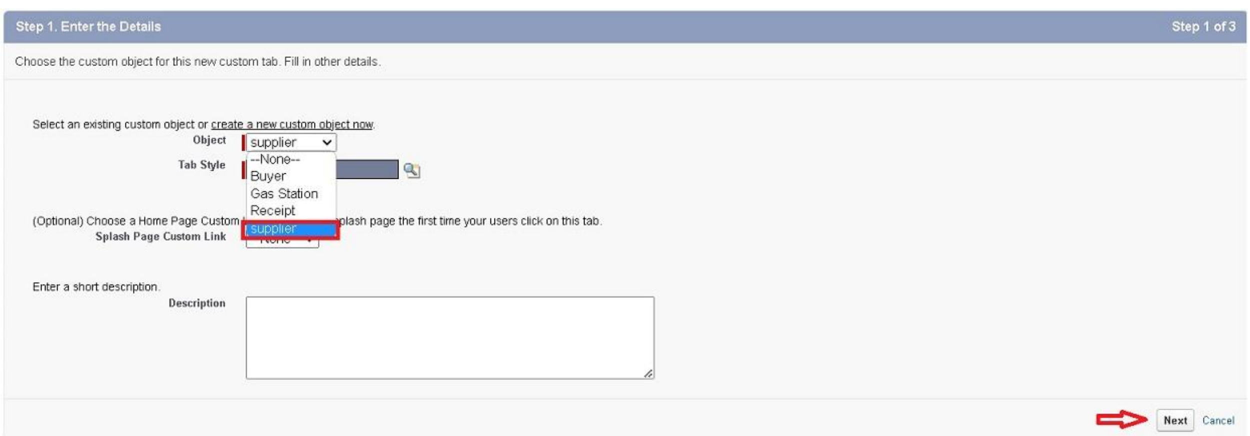
1. Go to setup page ? type Tabs in Quick Find bar ? click on tabs ? New (under custom object tab)

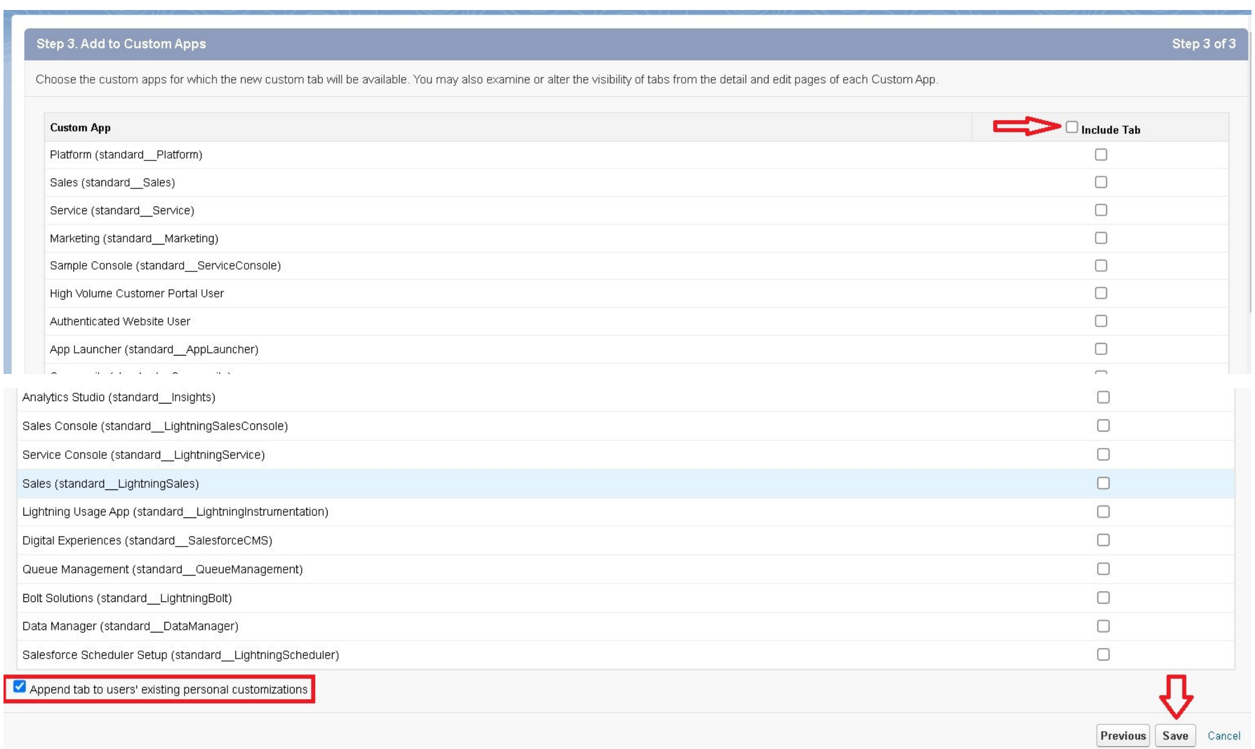


2. Select Object(Supplier) ? Select the tab style ? Next (Add to profiles page) keep it as default ? Next (Add to Custom App) uncheck the include tab .

3. Make sure that Append tab to users' existing personal customizations is checked.

4. Click save.



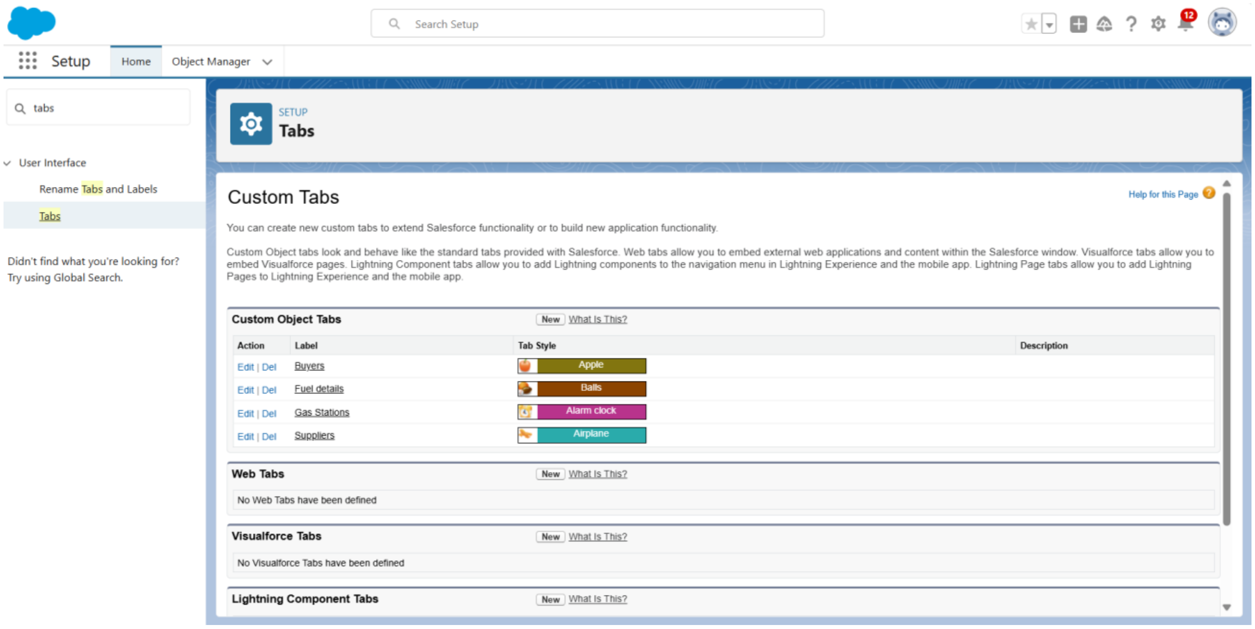


Activity 2: Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “ Gas station,

Buyer, Fuel details”.

2. Follow the same steps as mentioned in Activity -1 .



MILESTONE-4:THE LIGTHNING APP

what is Lightning App?

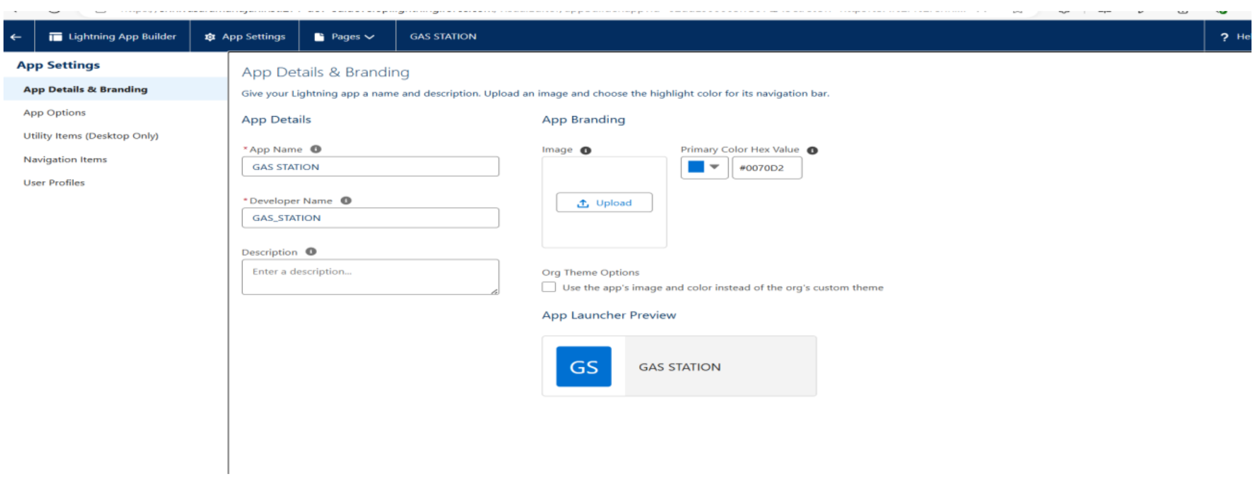
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom color and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

Activity 1: Create a Lightning App

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

- To Add Navigation Items:
- Select the items (Supplier, Gas Station, Buyer, Receipt) from the search bar and move it using the arrow button ? Next
- To Add User Profiles:Search profiles (System administrator) in the search bar ? click on the arrow button ? save & finish.



<u>MILESTONE-5:FIELDS</u>

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:

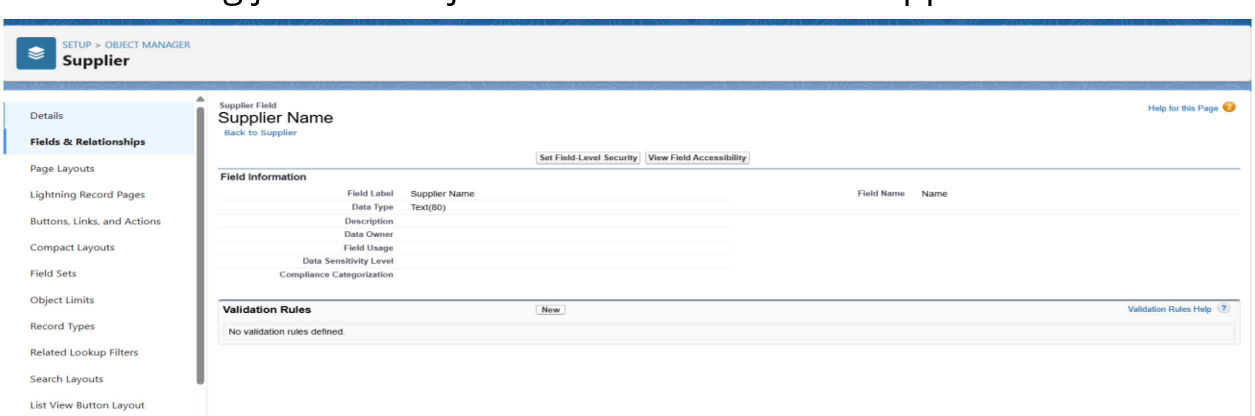
On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary.

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.

Activity 1: Creating Junction Object

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

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

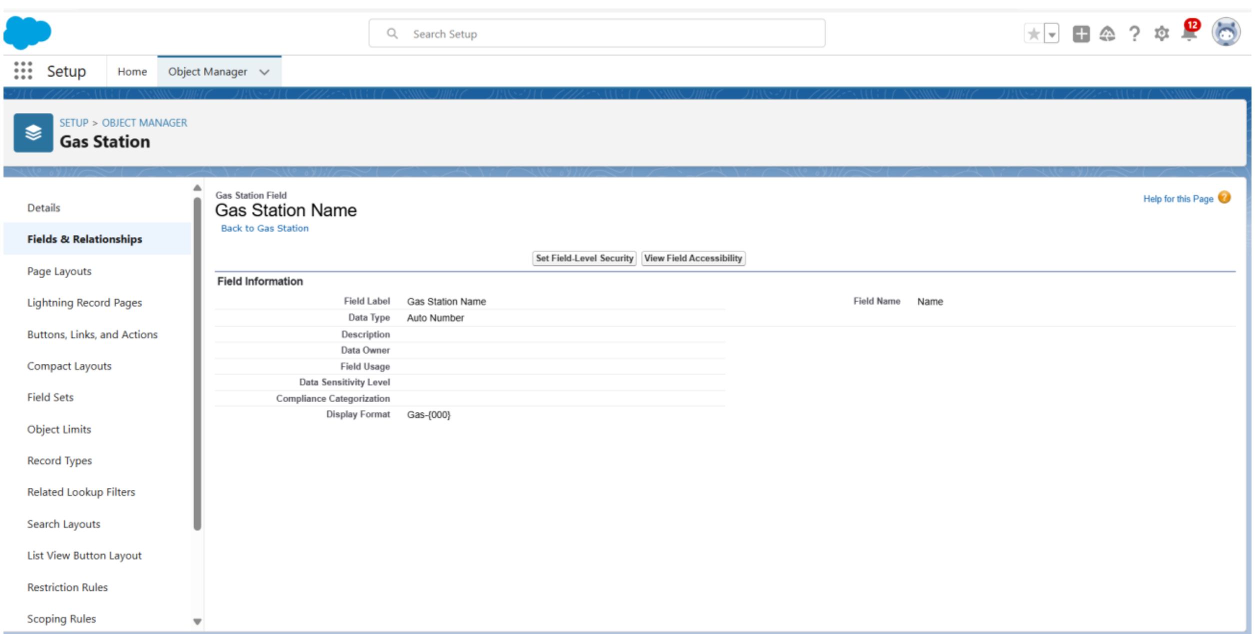


- **Activity 2: Creating a Master-Detail Relationship**
- Master-detail relationship is a type of relationship between two objects where the master object
- controls certain behaviors and settings of the detail object. Here are a few use cases that
- demonstrate the use of master-detail relationships

Creating Master-Detail Relationship between Buyer & Gas Station Object

To Create a Master-Detail relationship

1. Go to the setup page ? 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.

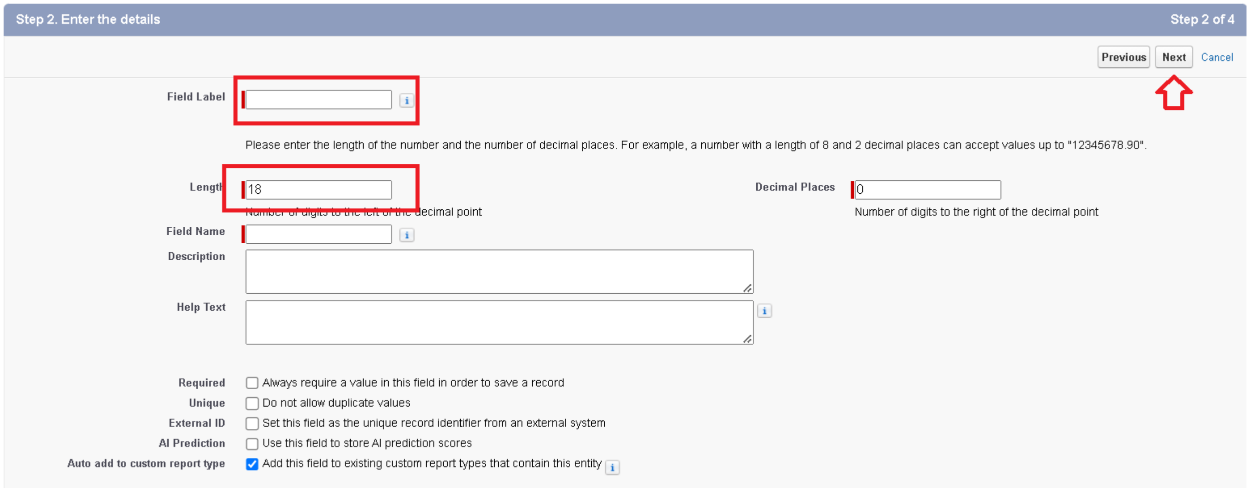


Activity 3: Creating the number field in Fuel details object

Creating the number field in Fuel details object

1. Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as "Number" and click Next.

3. Given the Field Label as “ Fuel Supplied ” and length as “ 5 ”.



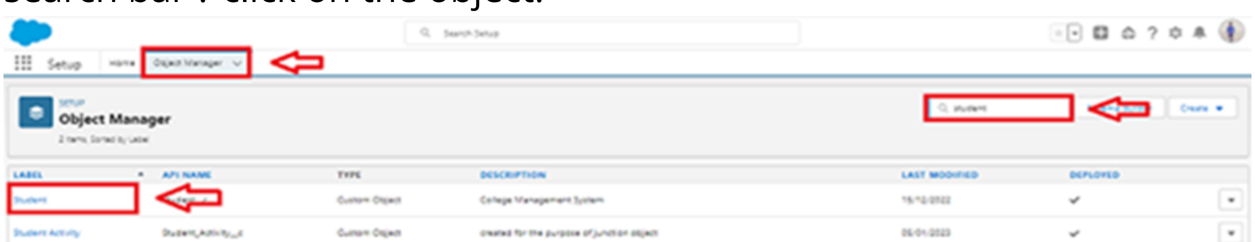
4. Field Name will be auto populated, and click on Next? Next ? Save.

Activity 4: Creating the Roll-up Summary

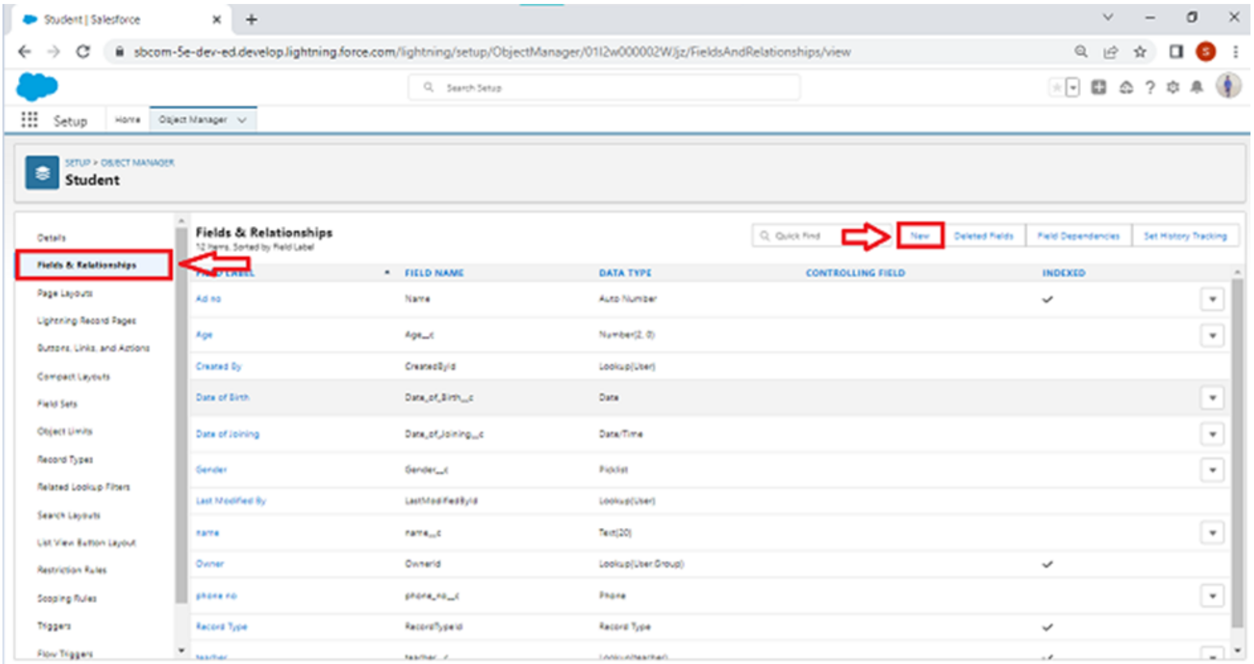
A rollup summary field is a field that summarizes data from a child object to a parent object that share a master-detail relationship. Rollup summary fields can use the COUNT, SUM, MIN, and MAX functions. For example, you could use a rollup summary field to display the total value (amount of fuel supplied)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

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

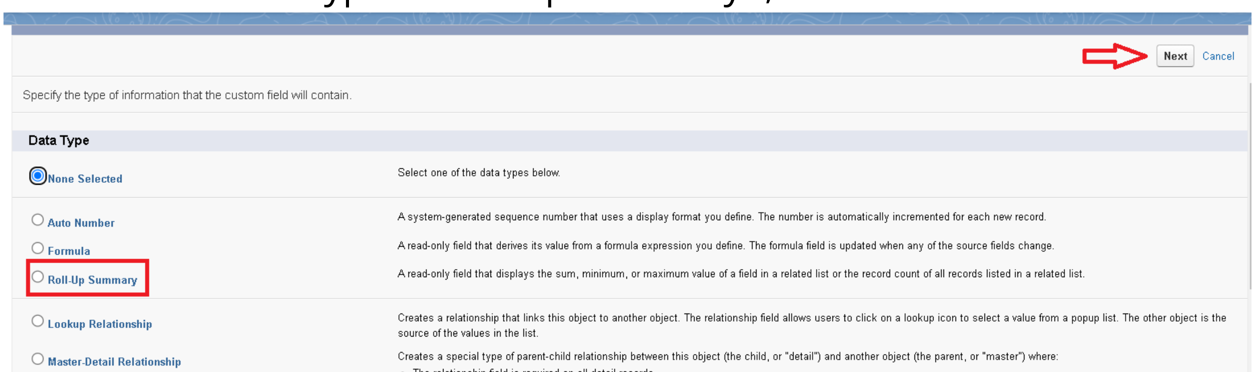
1. Go to setup ? click on Object Manager ? type object name(Supplier) in search bar ? click on the object.



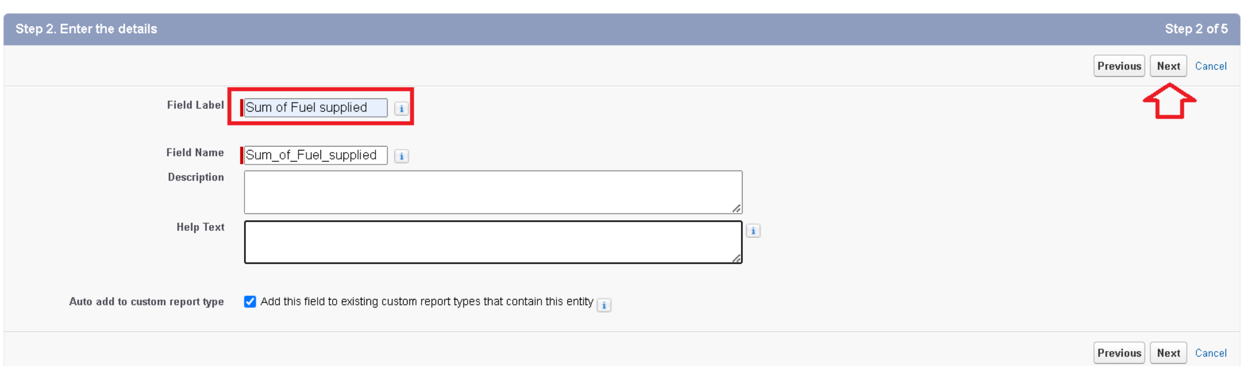
2. Now click on “Fields & Relationships” ? New



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



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



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.

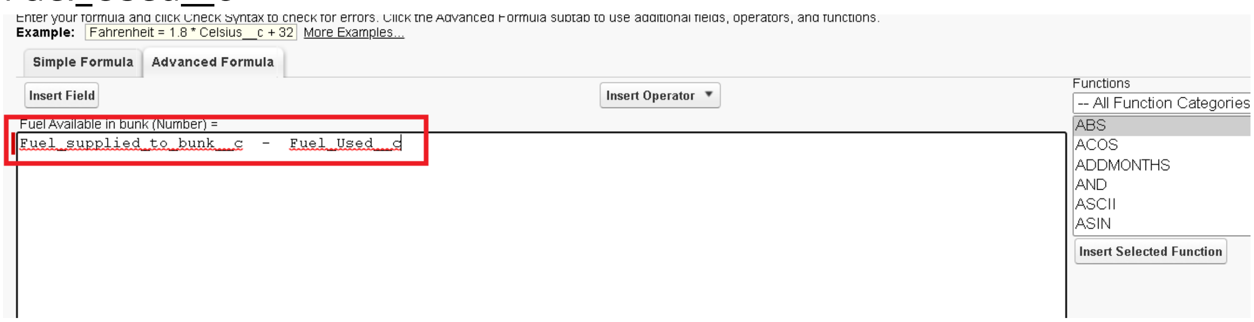
8. Follow the same steps for the Gas station Object from 1 to 3
9. Give the Field label as “ Fuel supplied to bunk ”,Field Name will be Auto generated, and click Next.
10. Select the summarized object as “ Fuel details ”.
11. Select the Rollup type as “sum”.
12. Select the field to aggregate as “ Fuel supplied ”, and click Next ? Next ? Save.

Activity 5: Creating Formula Field in Gas Station Object

A **formula field** is a custom field that can be used to calculate or display data on a Salesforce record.
Formula fields can be used to perform a variety of tasks, such as:
 Calculating totals or averages
 Creating custom fields that display data from other fields
 Validating data entry
 Automating processes
1. Go to setup ? 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.

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

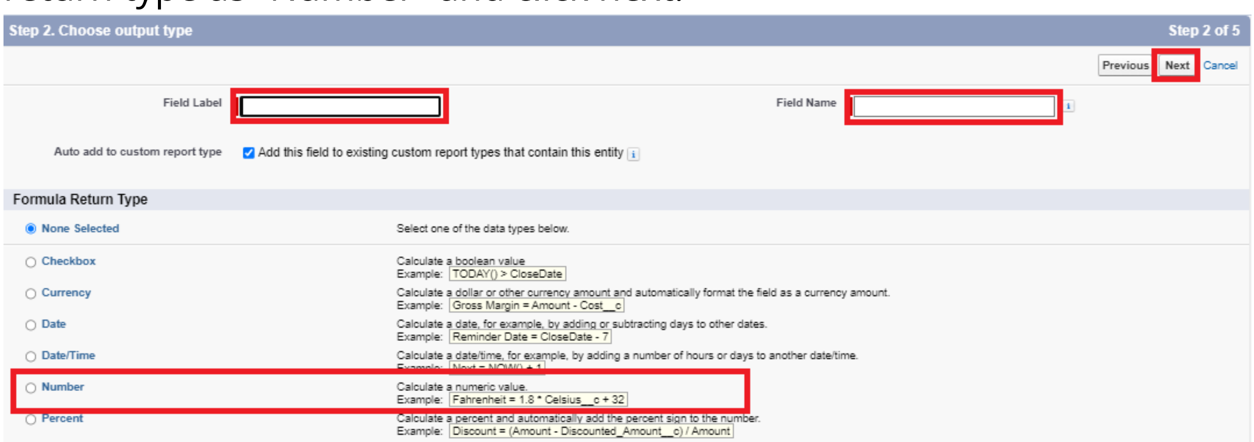


7. **Creating the Formula field in Buyer Object**
Note : check wheather that the fields that mentioned in the formula field are created are not , if not
go to activity 9 and create that fields mentioned in Buyer object
8. Go to setup ? click on Object Manager ? type object name(Buyer) in search bar ? click on
the object.
9. Click on fields & relationship ? click on New.
10. Select Data type as “Formula” and click Next.
11. Give Field Label and Field Name as “Customer Name” and select formula return type as

“TEXT” and click next.
12. Insert field formula should be : First_Name__c + ' ' + Last_Name__c
13. click “Check Syntax” and Save.

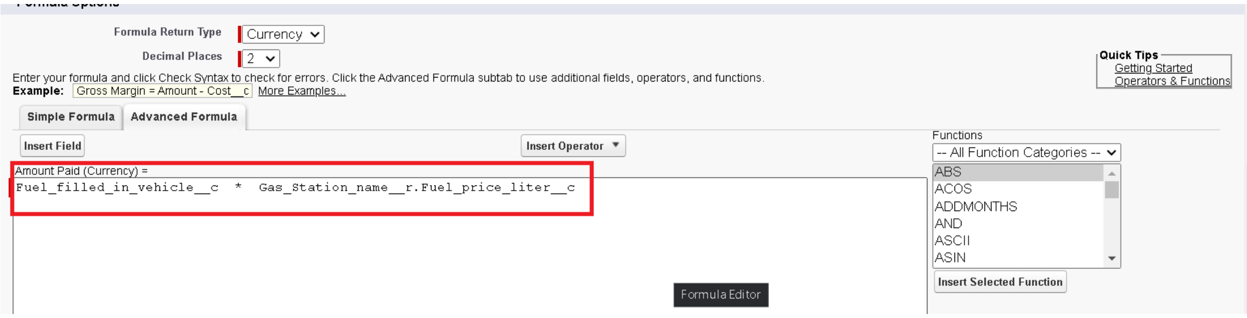
Activity 6: Creating Cross Object Formula Field in Buyer Object

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



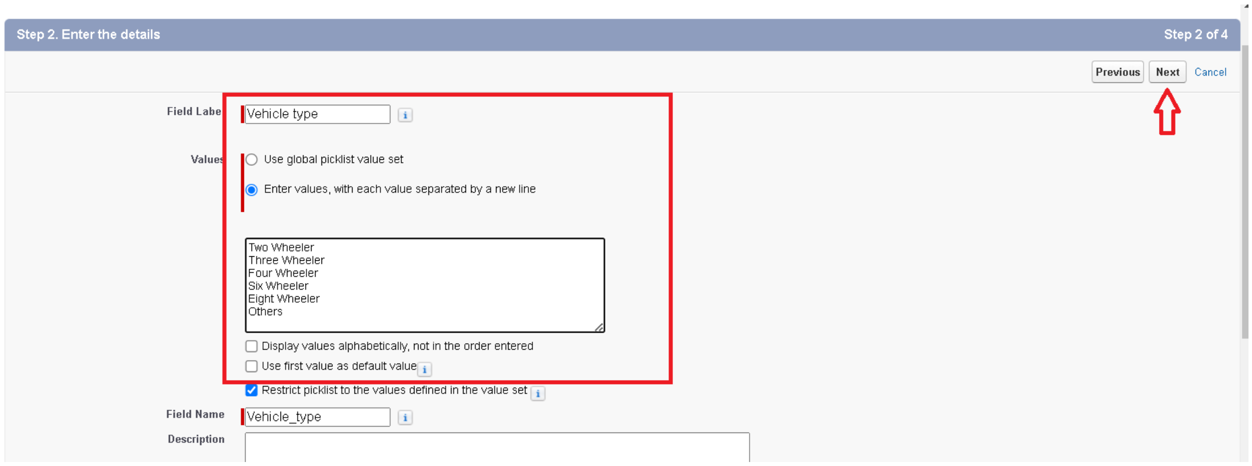
5. Insert fields formula should be :
Fuel_filled_in_vehicle__c * Gas_Station_name__r.Fuel_price_liter__c
6. Under Advanced Formula write down the formula and click “Check

Syntax” and Save.



Activity 7: 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.

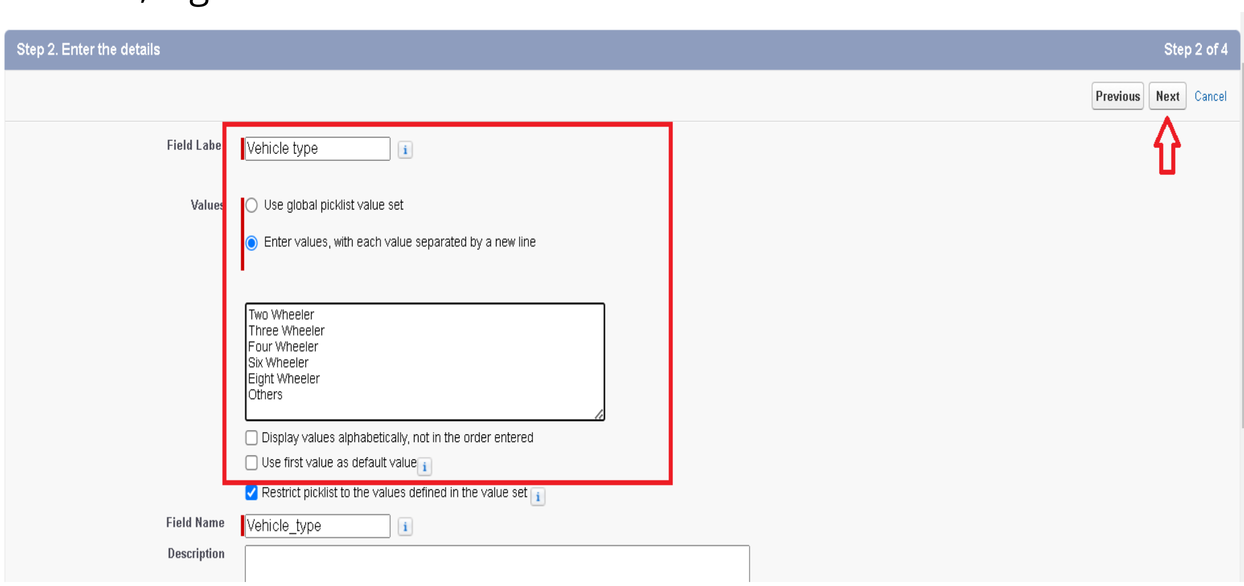


6. Click Next.
7. Next ? Next ? Save & New.
8. Repeat the process 1 and 2 steps .

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.

Activity 8: Creating the validation rule

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.

MILESTONE-6:PAGE LAYOUTS

What is Page Layout?

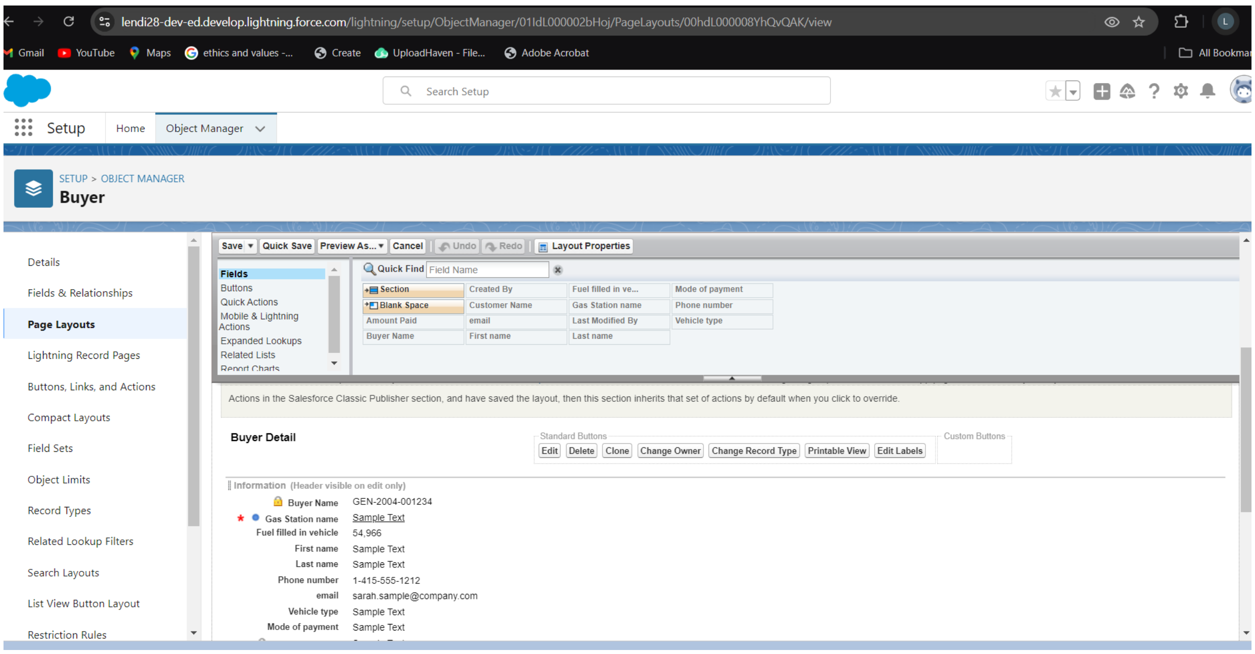
Page Layout in Salesforce allows us to customize the design and organize detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

Activity 1: Creating the page layout

- Go to Setup ? Click on Object Manager ? Search for the object (Buyer) ? From drop down select the object and click on it.
- Click on Page layout ? Click on New.
- Select the existing page layout, and give the page layout name as “customer layout”, and click save.
  Drag and drop the section field to Buyer details and create the section.
- Enter the section name as “Persoanl details”, ? click Ok.
- Now drag the fields to this section that mentioned , they are
- First name , last name , customer name , phone number, email, Gas station name.
- Follow the same process for another two sections as shown above

,they are: One section is “ vehicle info ” , drag the fields that are Fuel filled in vehicle, vehicle type.

- Another section is “Recepit details ”, and drag the fields that are Mode of payment , Amount paid.
- Then , Click save.



MILESTONE-7:PROFILES

What is a Profile?

In Salesforce, a profile is a set of settings and permissions that define what a user can do within the Salesforce environment. Profiles control a wide variety of actions and data visibility for users. Every user in Salesforce is assigned a profile, which can be customized to meet specific business needs.

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:**

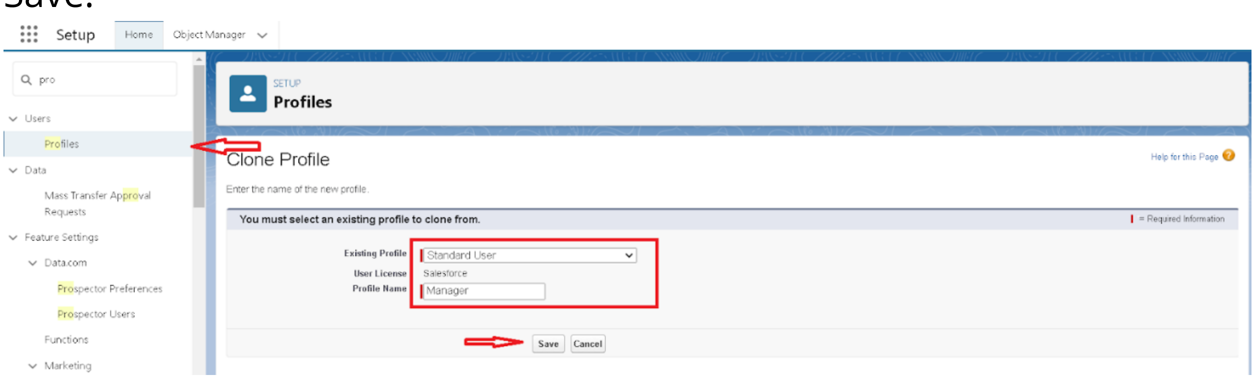
Custom ones defined by us.

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

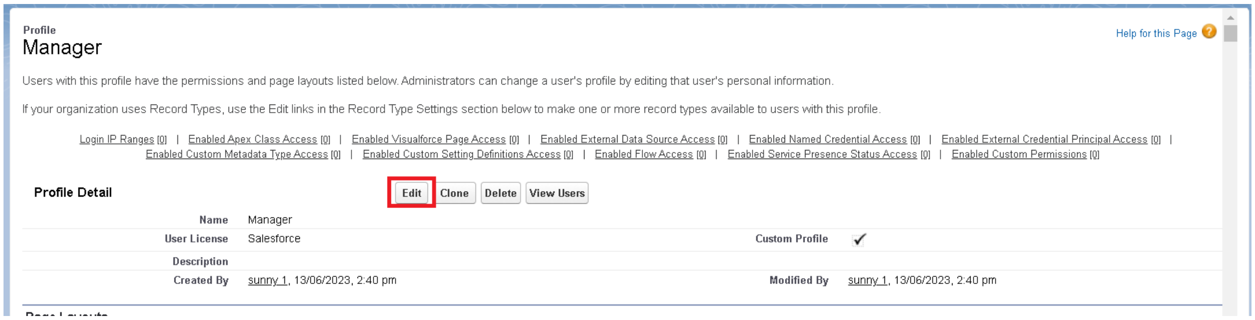
Activity 1: Manager Profile

To create a new profile:

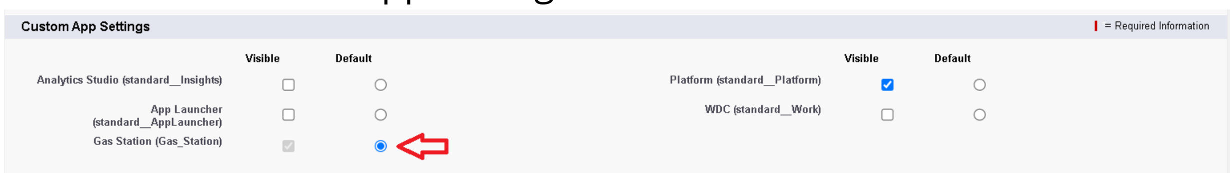
1. Go to setup ? type profiles in quick find box ? click on profiles ? clone the desired profile (Standard User) ? enter profile name (Manager) ? Save.



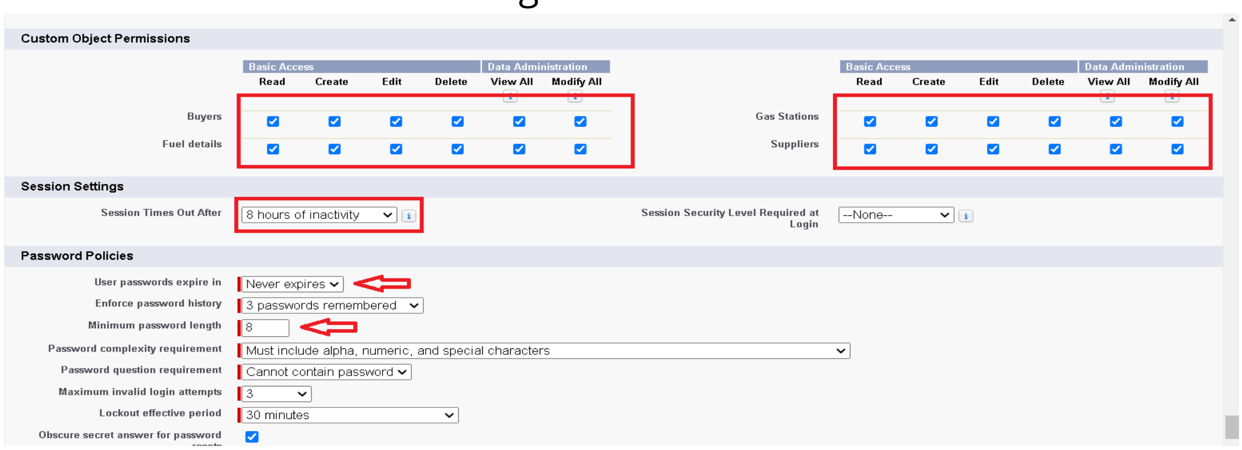
2. While still on the profile page, then click Edit.



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



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



5. Change the session times out after should be “ 8 hours of inactivity”.
6. Change the password policies as mentioned :
7. User passwords expire in should be “ never expires ”.
8. Minimum password length should be “ 8 ”, and click save.

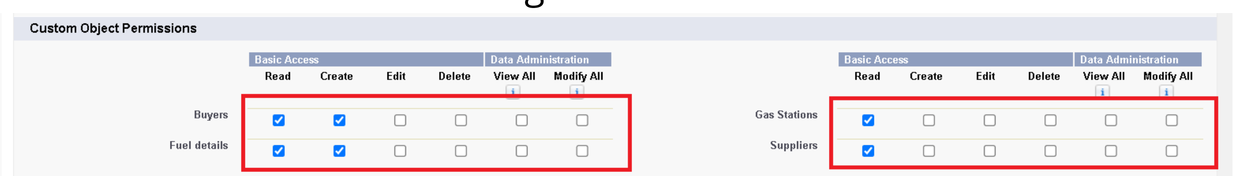
Activity 2: sales executive Profile

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.
5. And click save.

Activity 3: 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.

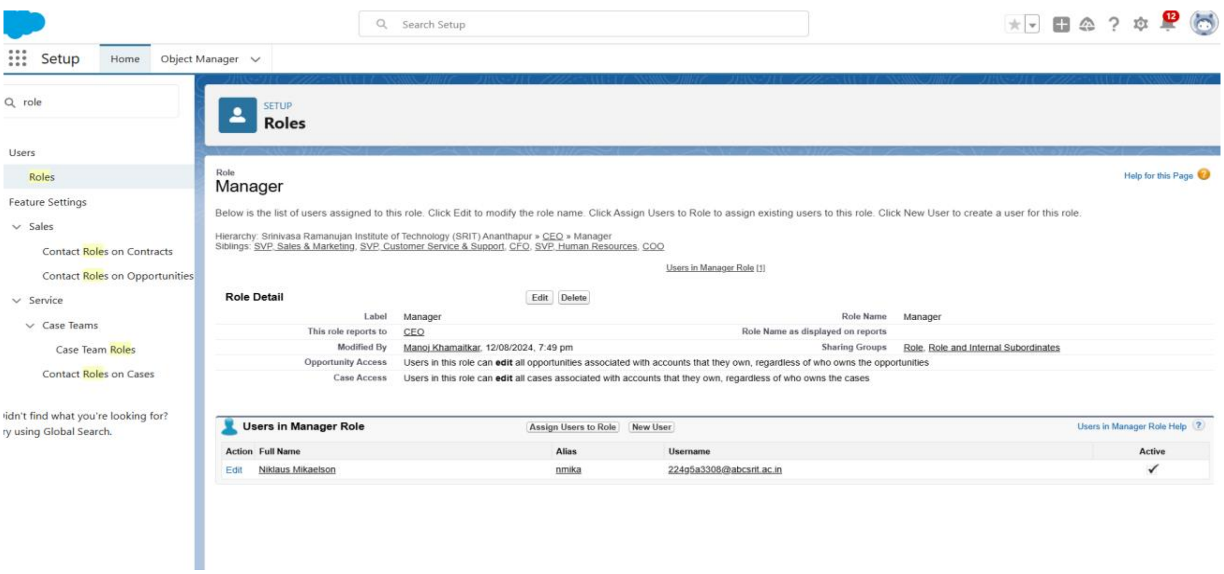


MILESTONE-8:ROLE AND ROLE HIERARCHY

In Salesforce, a **role** is a part of the **role hierarchy** that determines a user's access to records based on their position in the hierarchy. It is primarily focused on data visibility and sharing, rather than functionality or permissions (which are managed by **profiles**).

Activity 1: Creating Manager Role

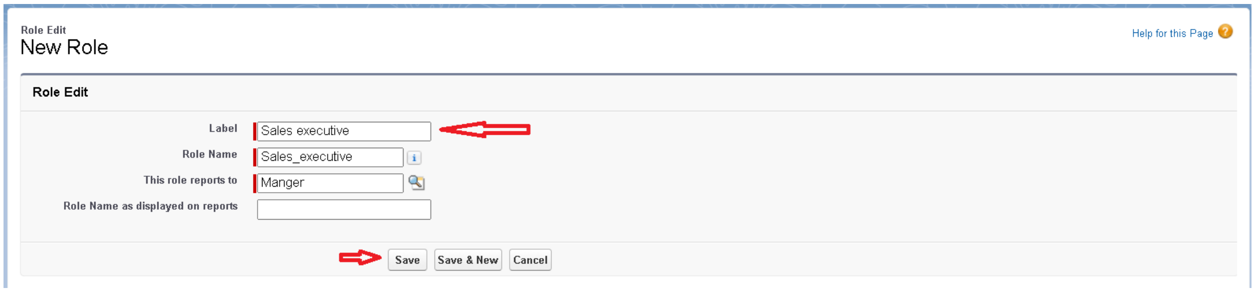
- Go to quick find ? Search for Roles ? click on set up roles.
- Click on Expand All and click on add role under whom this role works.
- Click on Expand All and click on add role under whom this role worksGive Label as “Manager” and Role name gets auto populated. Then click on Save.



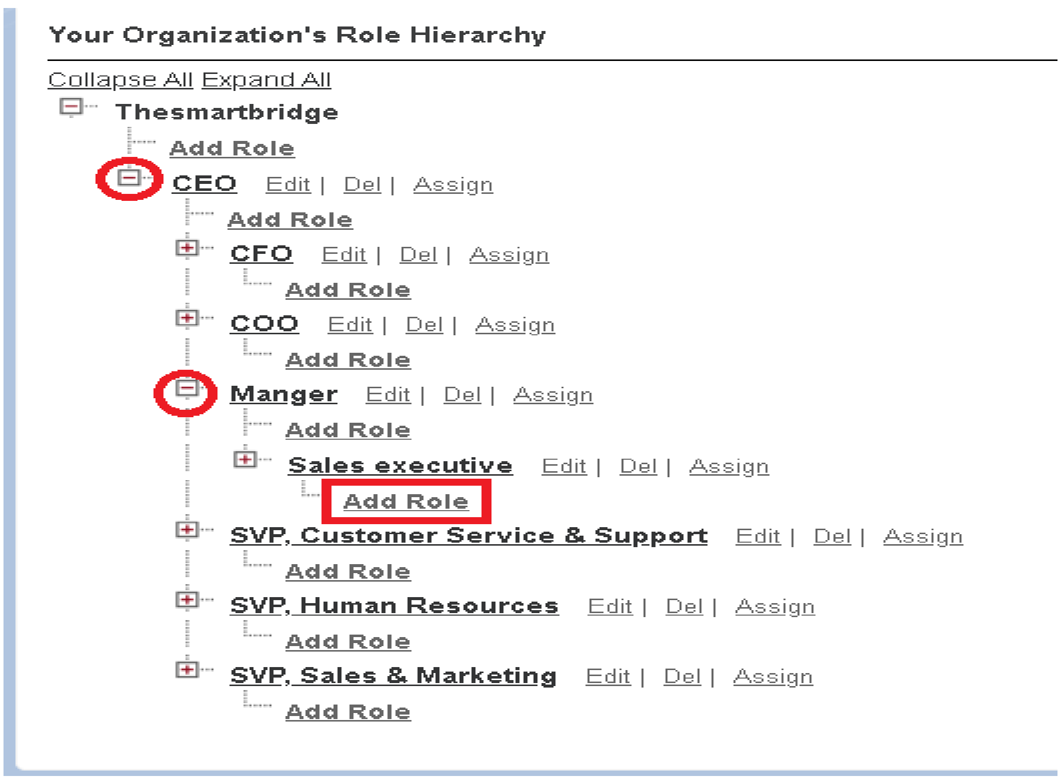
Activity 2: Creating another roles

- Creating another two roles under manager
- Go to quick find ? Search for Roles ? click on set up roles.

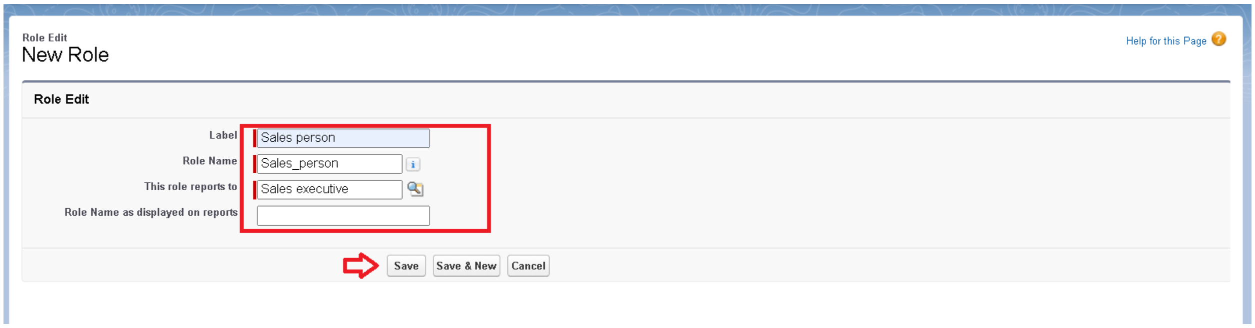
- Click plus on CEO role, and click add role under manager.
- Give Label as "sales executive" and Role name gets auto populated. Then click on Save.



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



- Give Label as "sales person" and Role name gets auto populated. Then click on Save.



MILESTONE-9:USERS

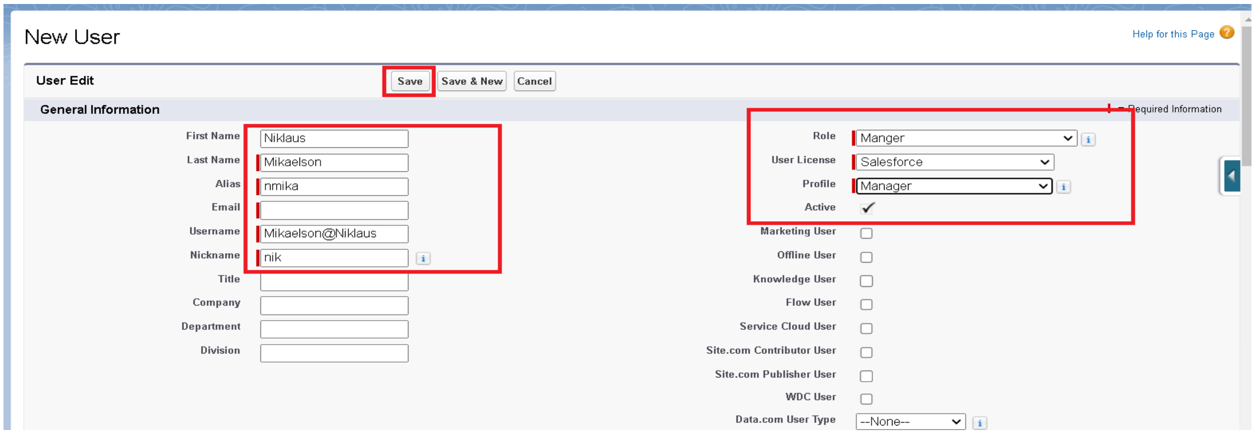
What is an user?

In Salesforce, a **user** is an individual who has access to the Salesforce platform, typically an employee or stakeholder in the organization. Each user is assigned a unique **user account** with defined settings and permissions, allowing them to access specific data, functionality, and features based on their role in the organization.

Activity 1: Create User

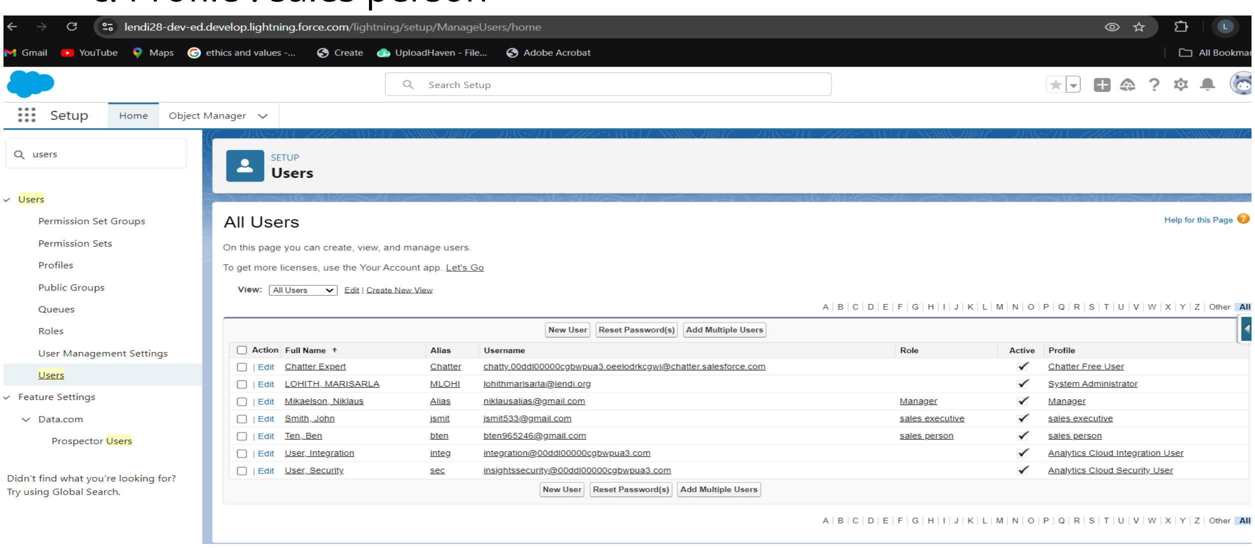
1. Go to setup ? type users in quick find box ? select users ? click New user.
2. Fill in the fields
1. First Name : Niklaus
2. Last Name : Mikaelson
3. Alias : Give a Alias Name
4. Email id : Give your Personal Email id
5. Username : Username should be in this form: text@text.text
6. Nick Name : Give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

9. Profiles : Manager



Activity 2: creating another users

1. Follow the same steps from above activity and create another user using:
    a. Role : sales executive
    b. User licence : Salesforce Platform
    c. Profile : sales executive
2. Repeat the steps and create another user using
    a. Role : sales person
    b. User licence : Salesforce Platform
    c. Profile : sales person



- The mentioned image is the users created under the various roles provided.

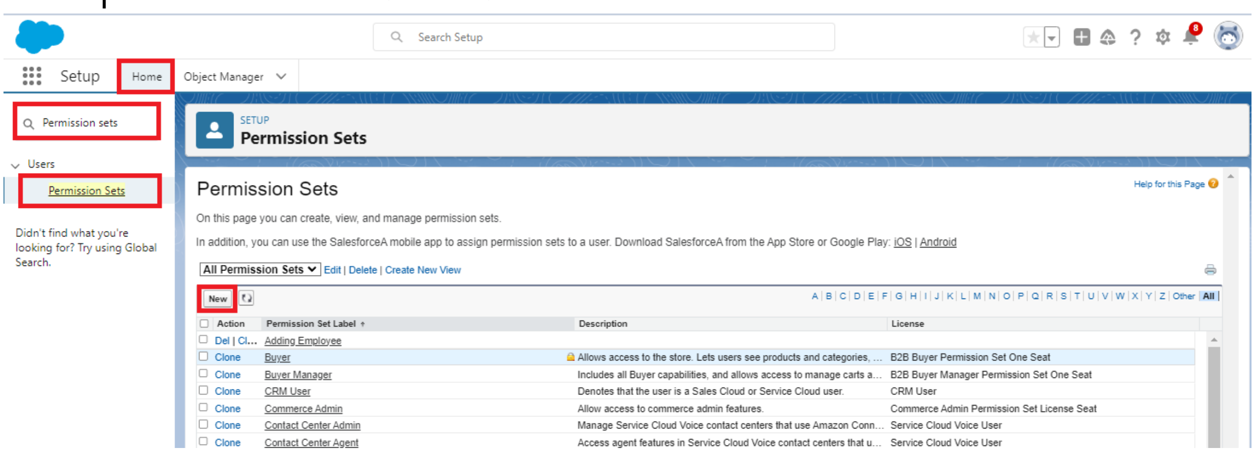
MILESTONE-10:PERMISSION SETS

What is an Permission set?

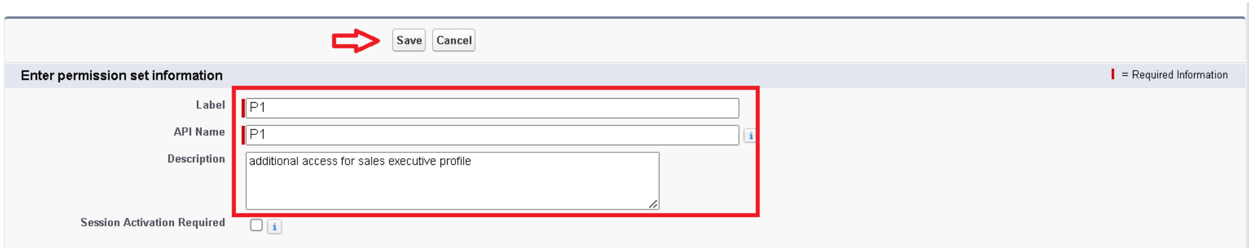
A standard permission set consists of a group of common permissions for a particular feature associated with a permission set license. Using a standard permission set saves you time and facilitates administration because you don't need to create the custom permission set.

Activity 1: Creating permission set

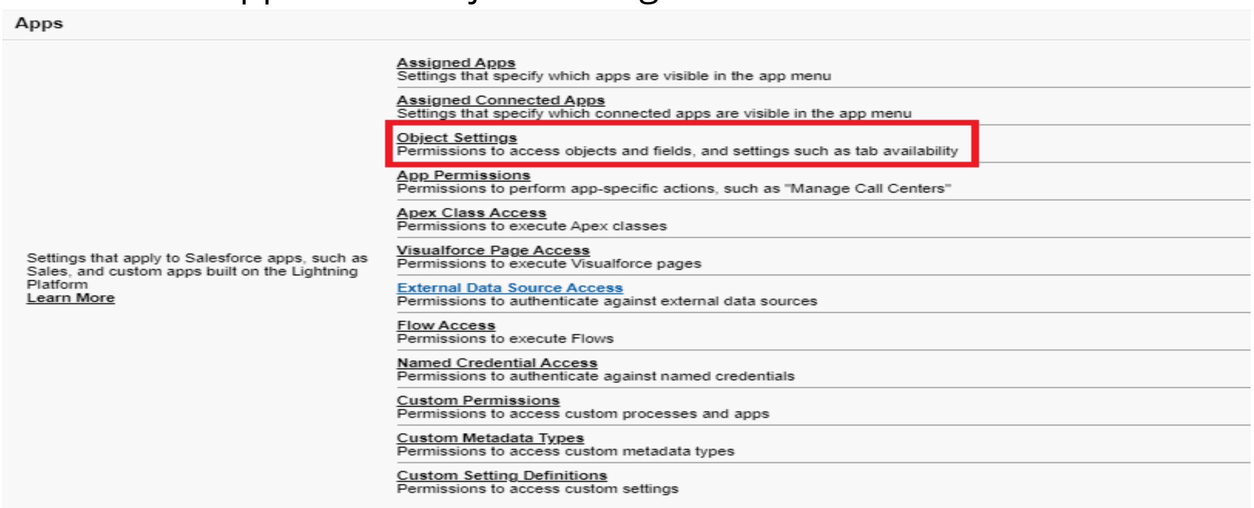
- Go to setup ? type “permission sets” in quick search ? select permission sets ? New.



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

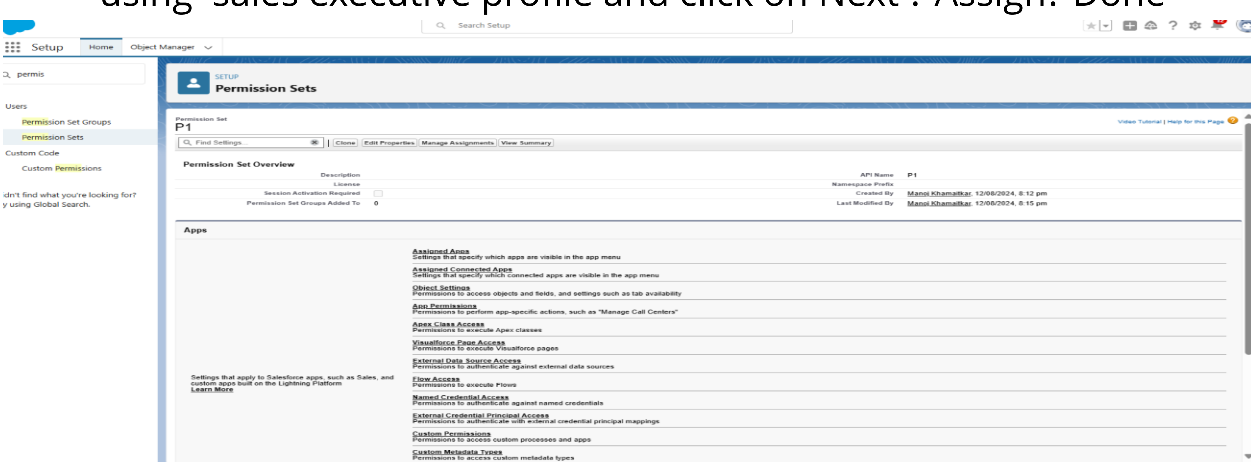


- Under Apps Select object settings



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

- Click on Save.
- After saving the permission click on the Manage assignment
- Now click on the Add Assignment.
- Now select the users which you have created in user milestone, using sales executive profile and click on Next ? Assign? Done



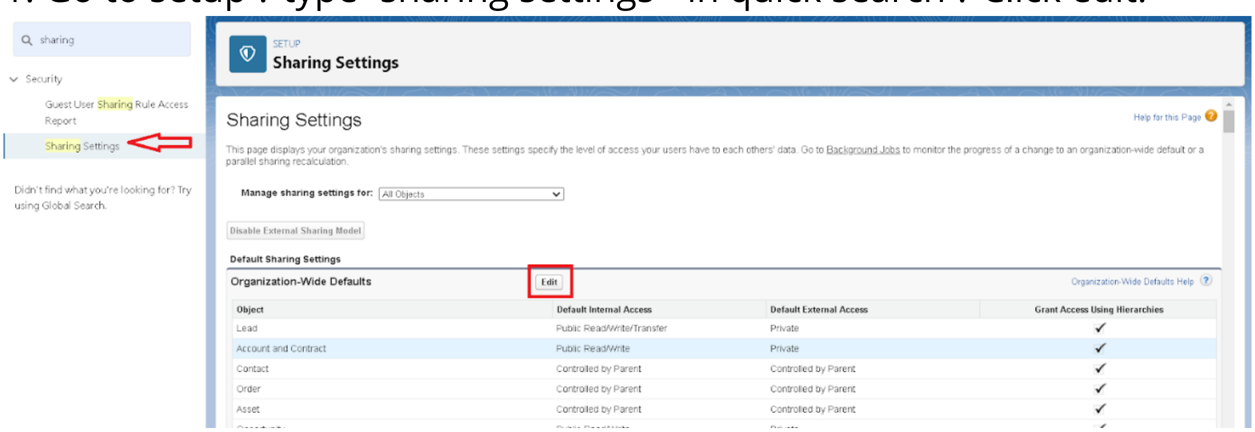
MILESTONE-11:SETUP FOR OWD

What is Setup for OWD?

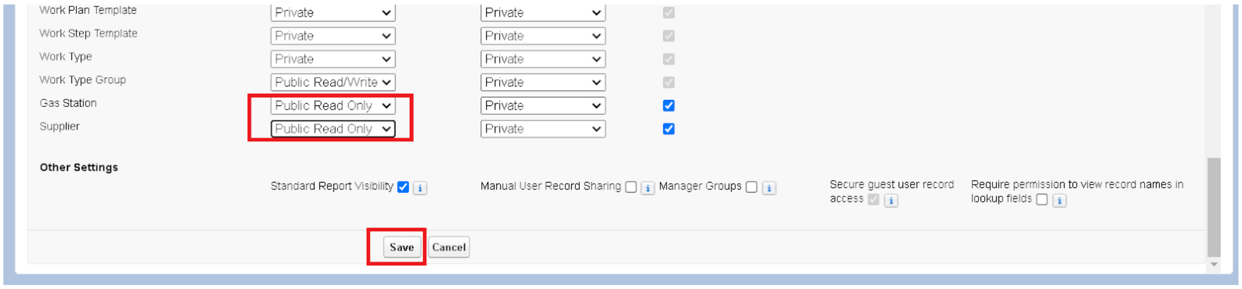
OWD (Organization-Wide Default) in Salesforce is a baseline setting for record access across the organization. It defines the default sharing model for objects and determines the level of access users have to records they do not own. You can award access through different methods that we will discuss 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

Activity 1: Create OWD Setting

1. Go to setup ? type “sharing settings ” in quick search ? Click edit.



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



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.

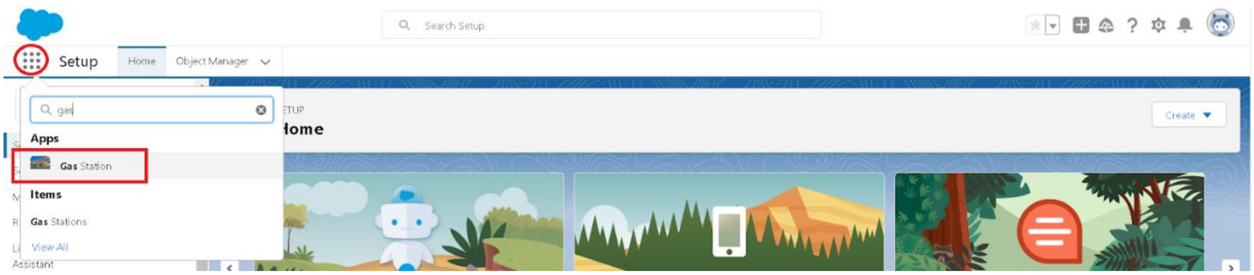
MILESTONE-12:USER ADOPTION

What is USER ADOPTION?

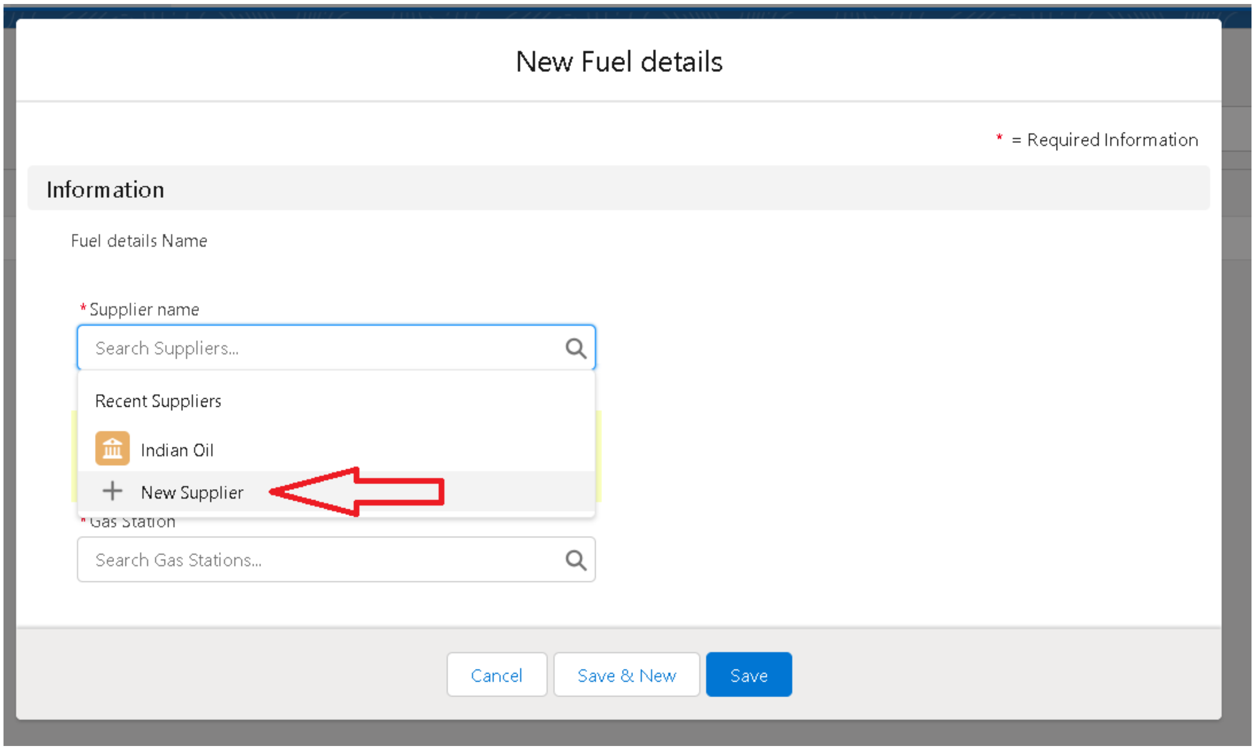
In Salesforce, a User is an individual who has login access to the Salesforce system. Each user is associated with a User Profile, which defines their permissions, and is assigned a role in the Role Hierarchy to determine data visibility.

Activity 1: create a record

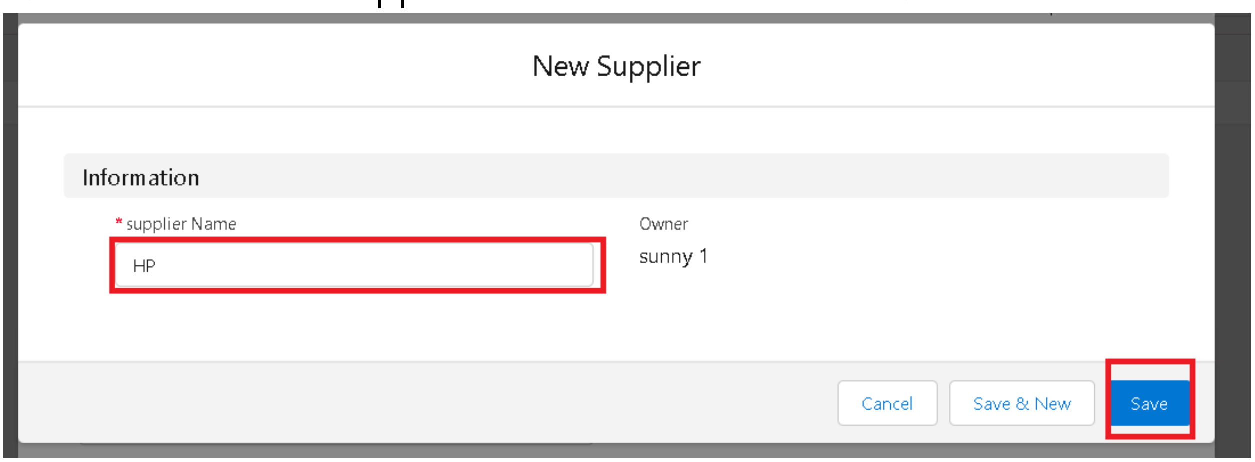
To create a record in junction object follow these steps
1. Click on the app launcher locate at left side of the screen.
2. Search for “ Gas station” and click on it.
3. Click on “ fuel details tab”.
4. Click on new and fill the details as shown below figs, and click save.



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

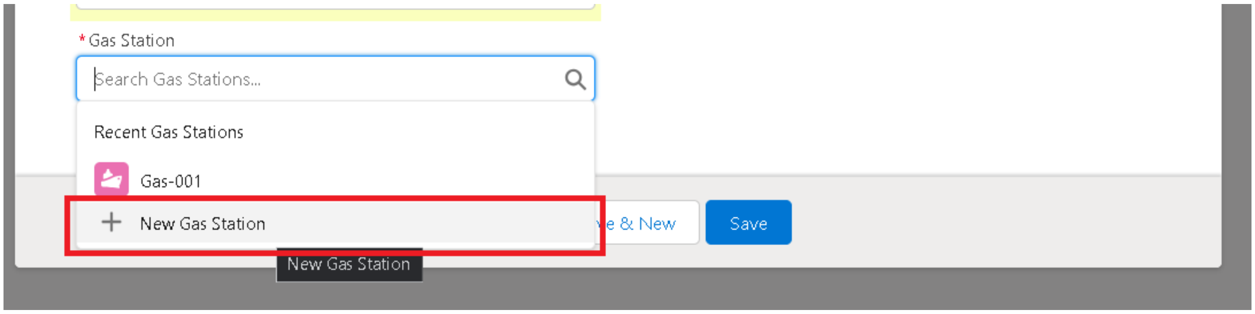


6. Fill the details in supplier record and click on save.

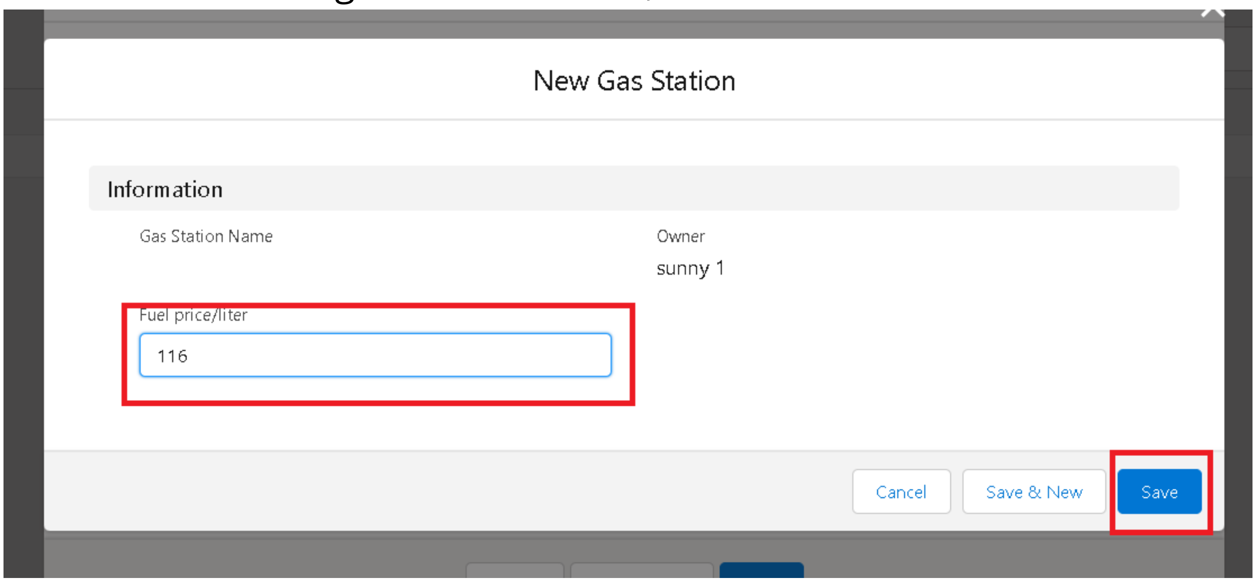


7. Creating the Gas station record in fuel details record, by clicking on

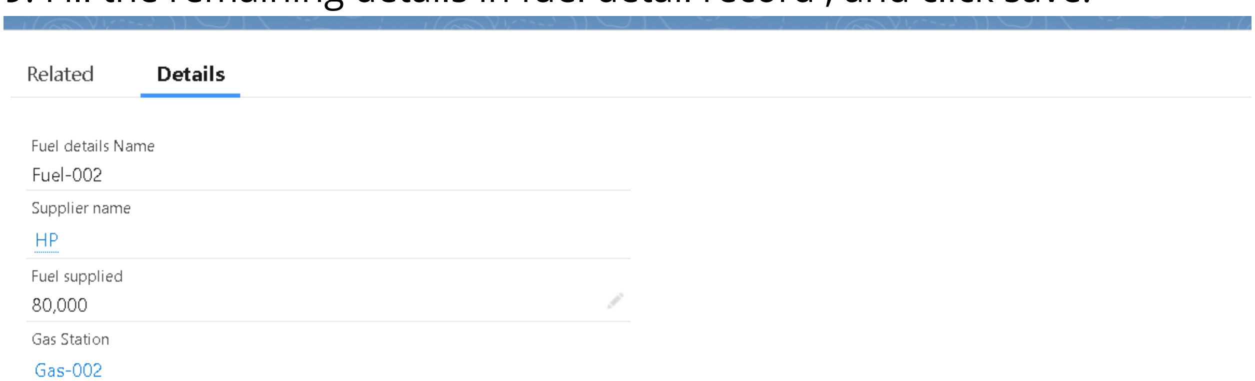
new gas station.



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



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

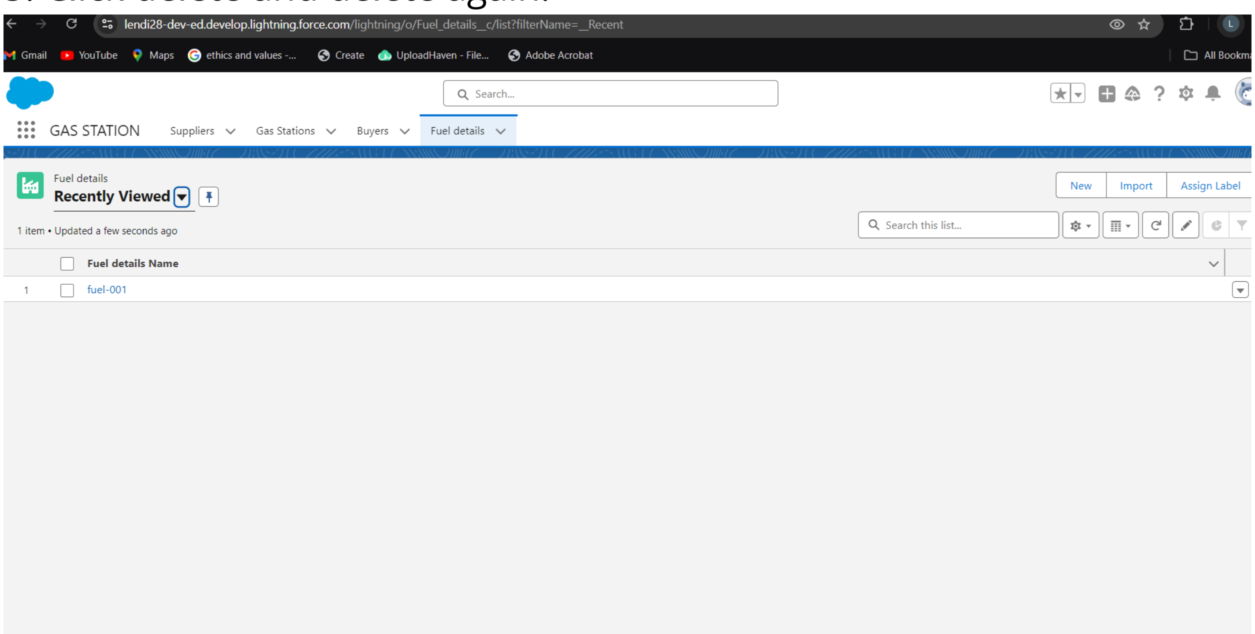


Activity 2: View a record

To create a record in junction object follow these steps
1. Click on the app launcher locate at left side of the screen.
2. Search for " Gas station" and click on it.
3. Click on " fuel details tab".
4. Click on the records that are already created.

Activity 3: 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.



- This page shows the existing records.

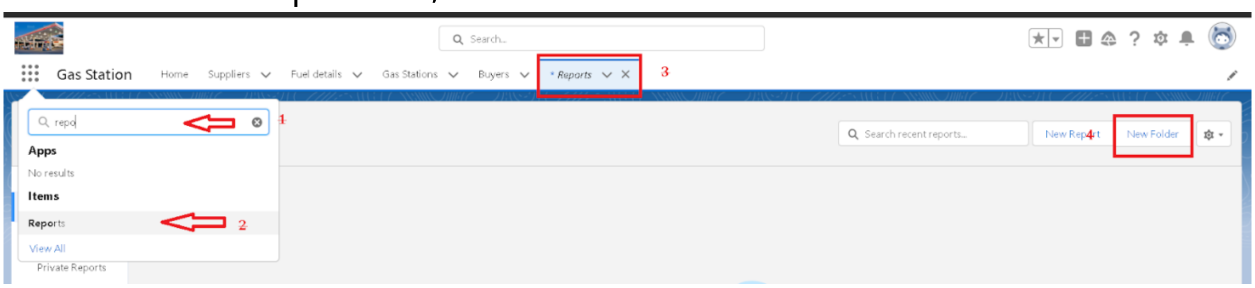
MILESTONE-13:REPORTS

What is a Report?

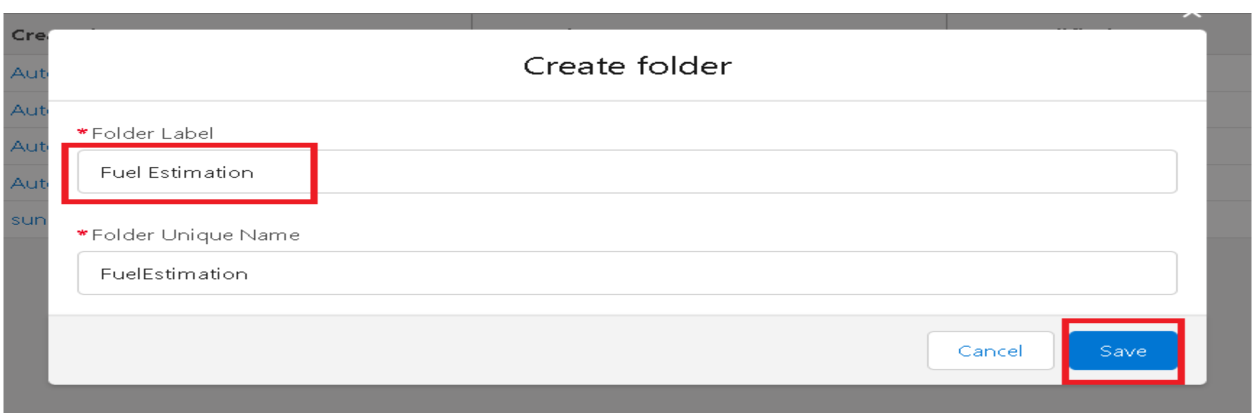
In Salesforce, Reports are a powerful tool for analyzing and displaying data stored in the system. Salesforce reports allow users to collect, filter, and present data in meaningful ways, helping to make data-driven decisions.

Activity 1: create a report folder

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

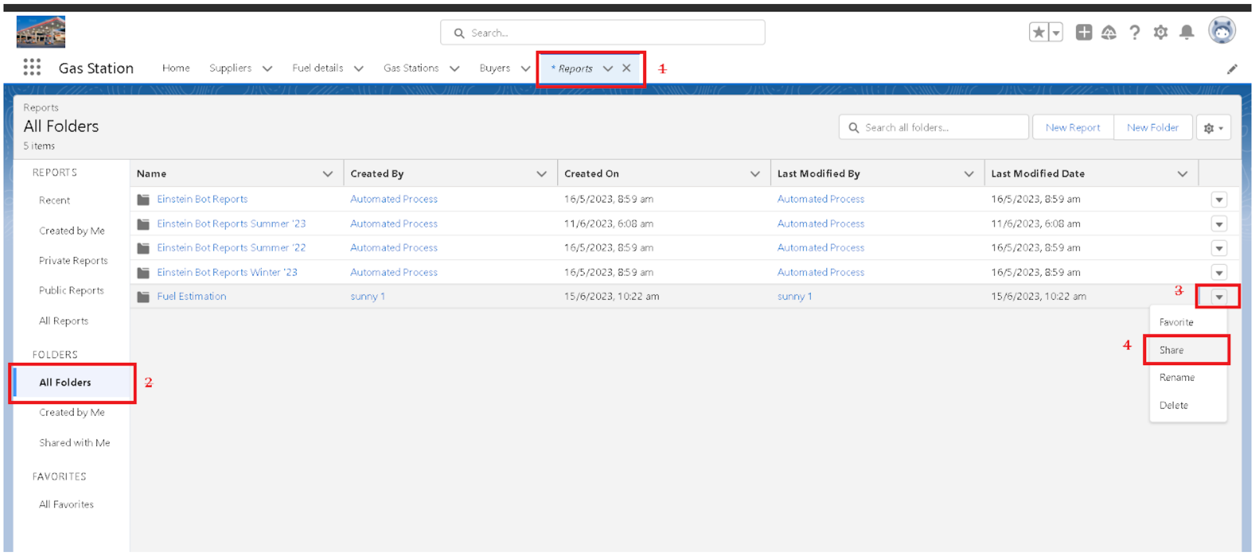


4. Give the Folder label as "Fuel Estimation ", Folder unique name will be auto populated.
5. Click save.

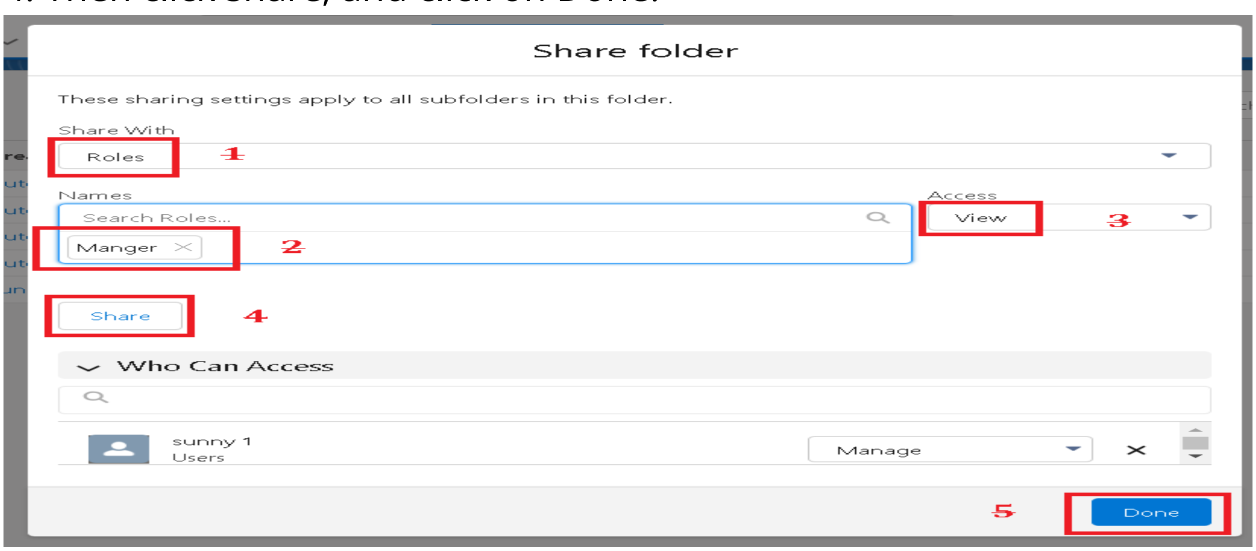


Activity 2: Sharing a report folder

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

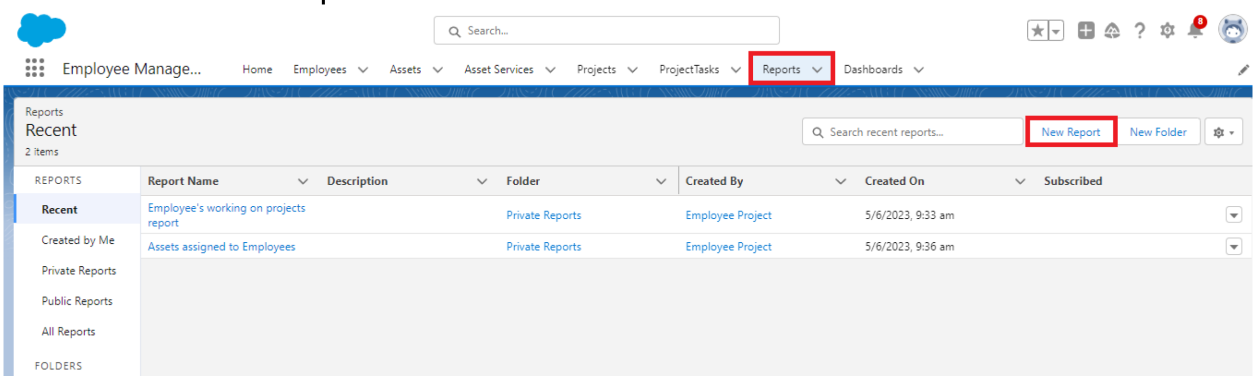


3. Select the share with as “roles”, in name field search for “manager”, give “view” as access for that role.
4. Then click share, and click on Done.

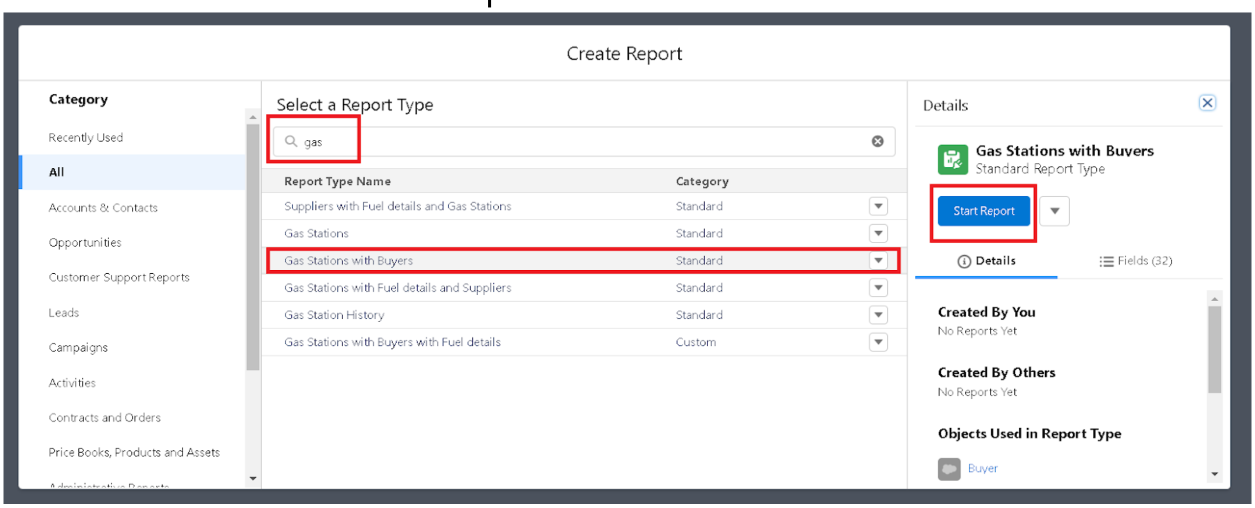


Activity 3: Create Report

- Go to the app ? click on the reports tab
- Click New Report.



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



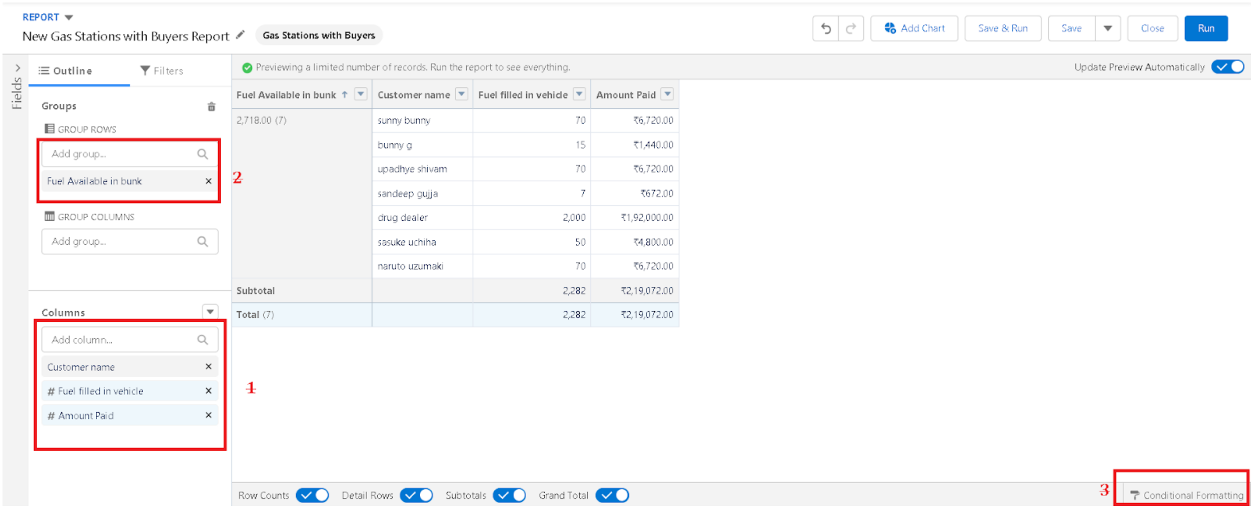
➤ Their outline pane is opened alredy, select the fields that mentioned below in column section.

a)Fuel filled in vehicle b)Amount paid

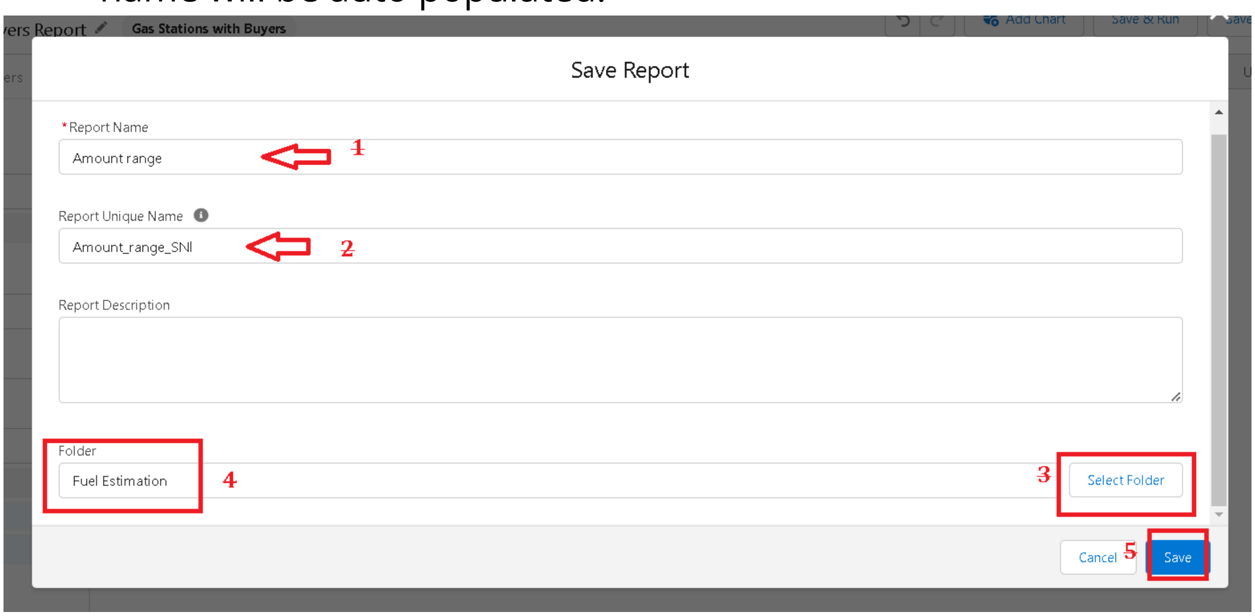
- Remove the unnecessary fields.

➤ Select the fields that mentioned below in GROUP ROWS section.

a)Fuel Available in bunk b)Customer name

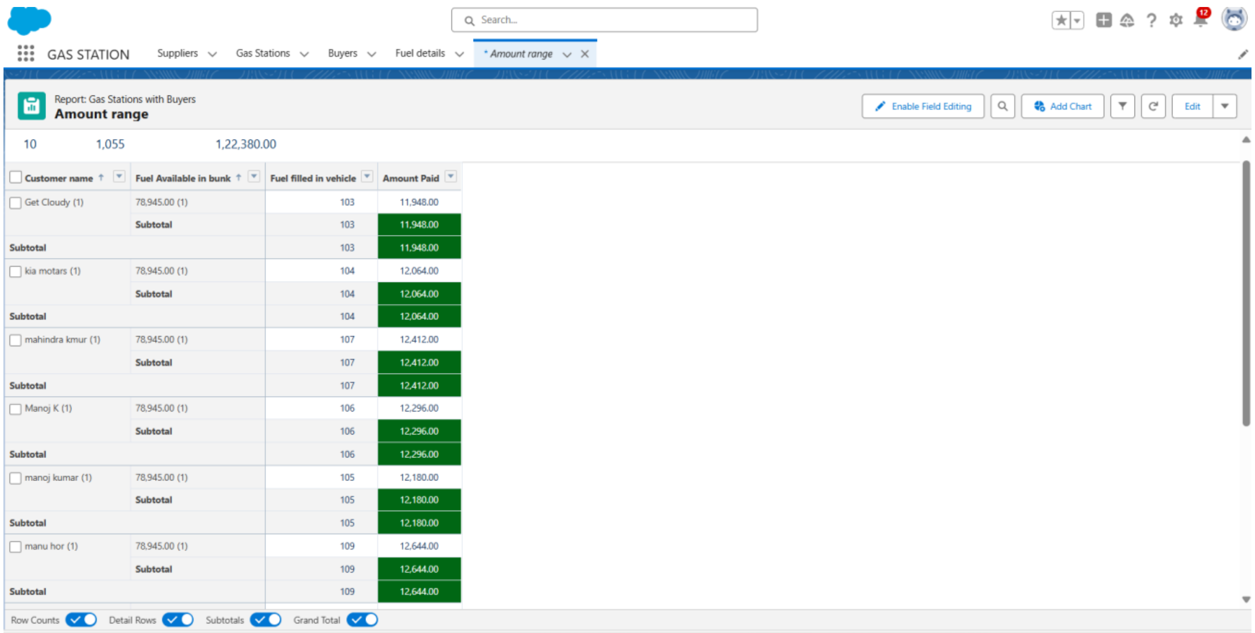


- Click on conditional formatting located at the bottom of the preview pane.
- Click on add conditional formatting rule.
- Change the apply conditional formatting to " sum of Amount paid".
- Mention the range form " 1000 to 5000 ".
- Dont change the colours, and click on Done.
- Click apply.
- Click save, give the report name as "Amount range", report unique name will be auto populated.



- Click on select folder, select " Fuel estimation" , click select folder

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



MILESTONE-14:DASHBOARDS

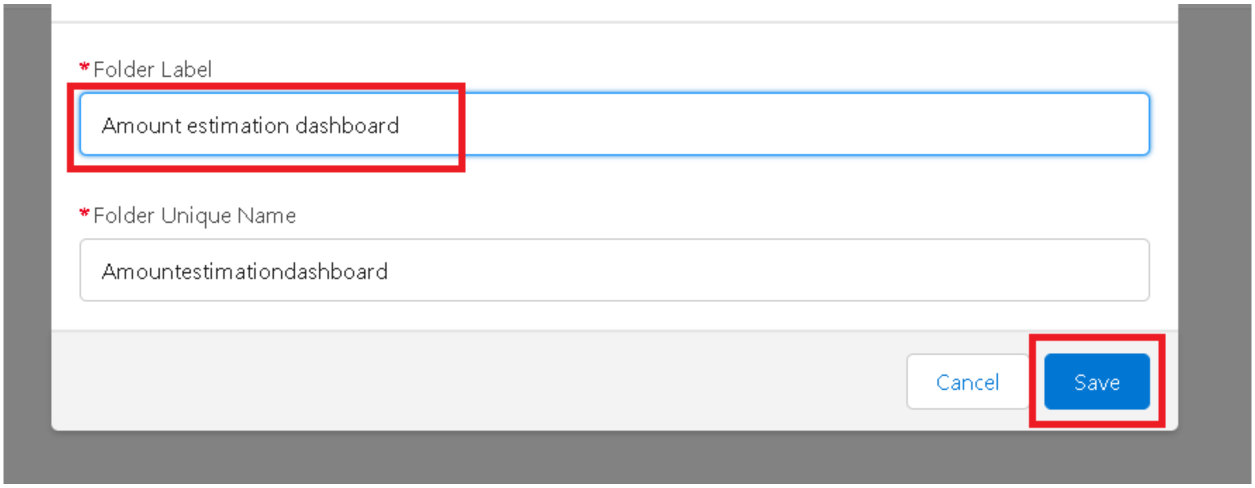
What is a Dashboard?

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.

Activity 1: Create Dashboard Folder

1. Click on the app launcher and search for dashboard.
2. Click on dashboard tab.
3. Click new folder, give the folder label as " Amount estimation

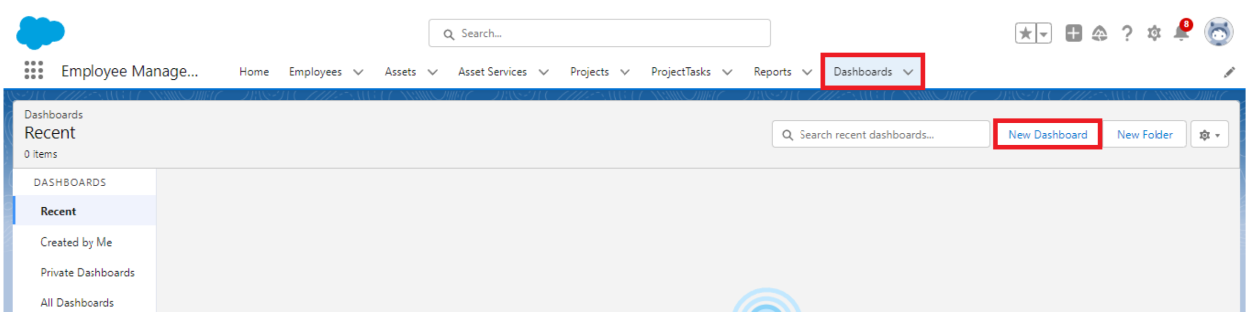
dashboard".
4. Folder unique name will be auto populated.
5. Click save.



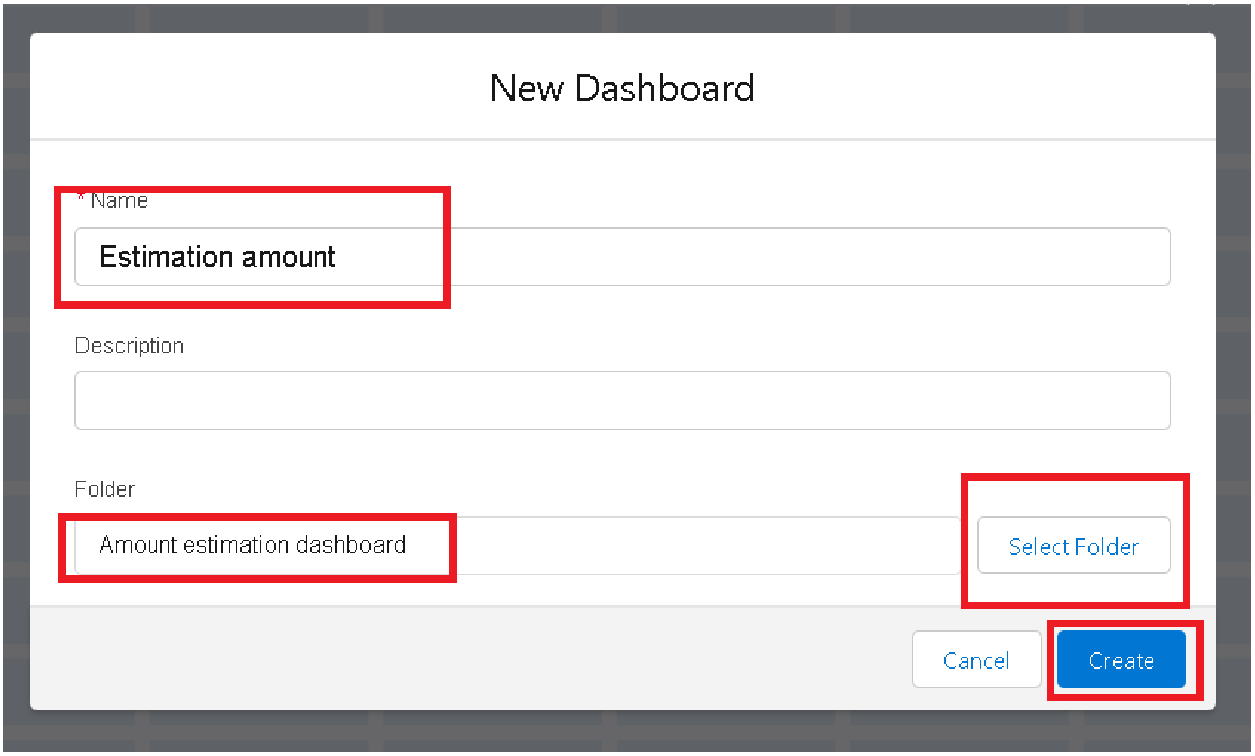
6. Follow the same steps, form milestone 12, and activity 2, and provide the sharing settings for the folder that just created.
7.The above step is referred to share the amount estimation dashboard created with role as manager as performed earlier in Reports.

Activity 2: Create Dashboard

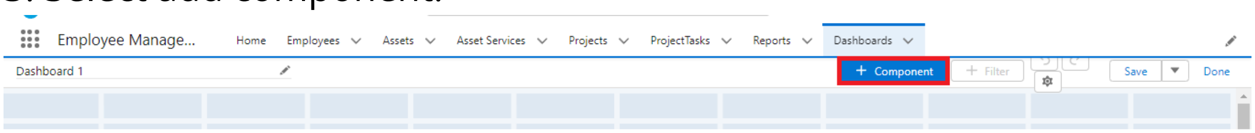
1. Go to the app ? click on the Dashboards tabs.



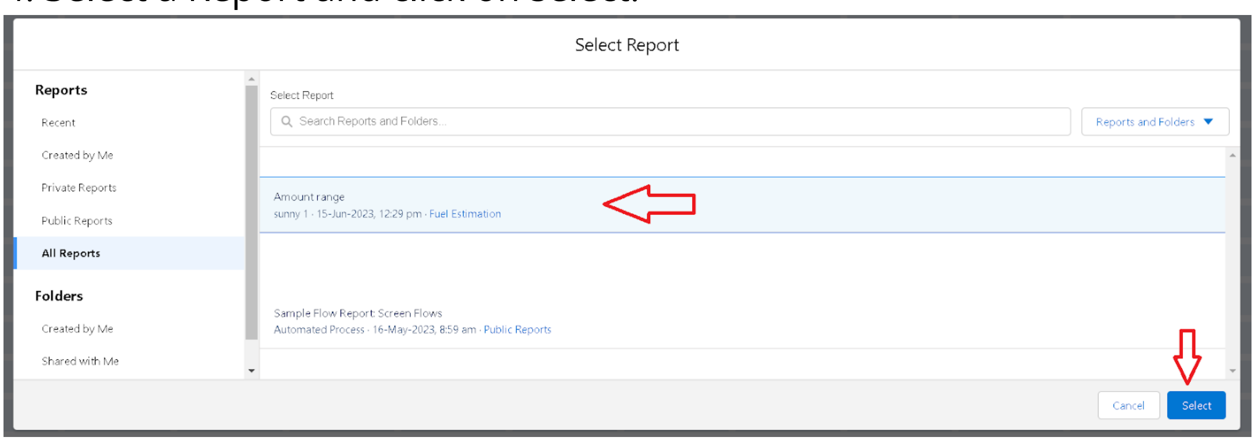
2. Give a Name and select the folder that created, and click on create.



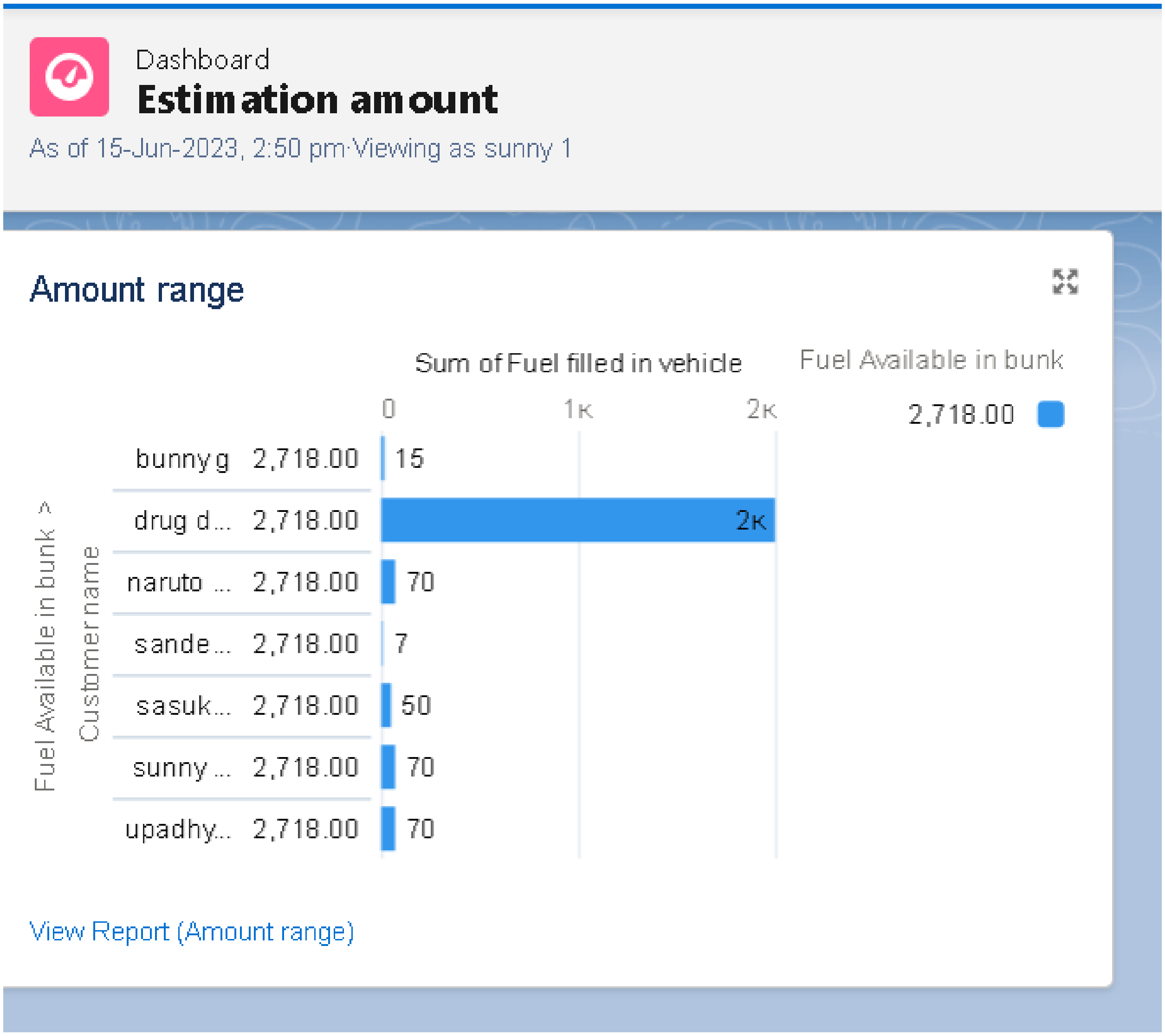
3. Select add component.



4. Select a Report and click on select.



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



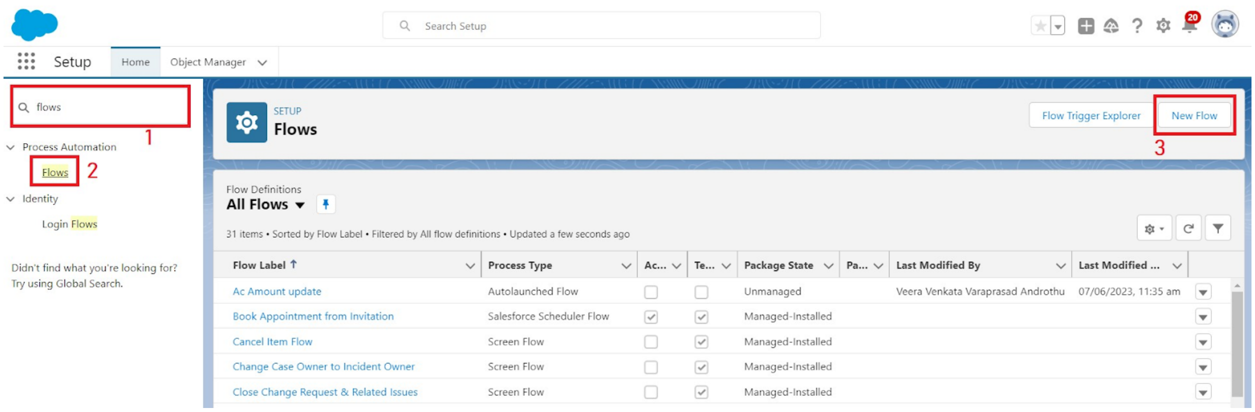
MILESTONE-15:FLOWS

What is a Flow?

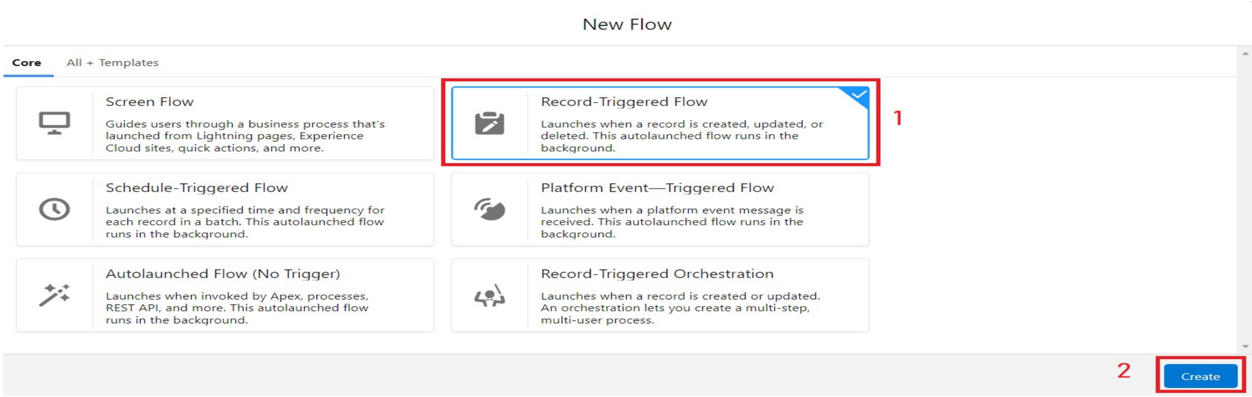
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Activity 1: Create a Flow

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



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

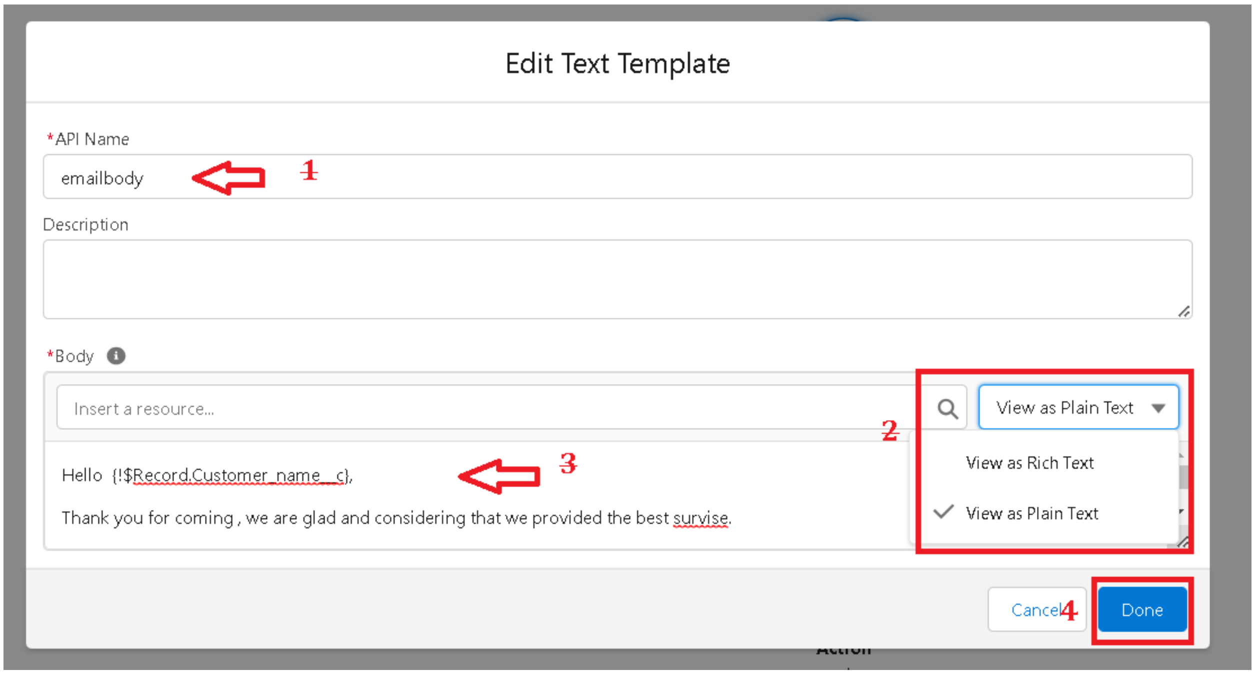


- Select the Object as a “buyer” in the Drop down list.
- Select the Trigger Flow when: “A record is Created or Updated”.
- Select the Optimize the flow for: “Actions and Related Records” and Click on Done.
- Now change the mode form Auto-layout to free-form.
- Now select the manger option in toolbox, click New resource.
- Select the resource type as text template.
- Enter the API name as “ emailbody”.
- In body field paste the syntax that given below.

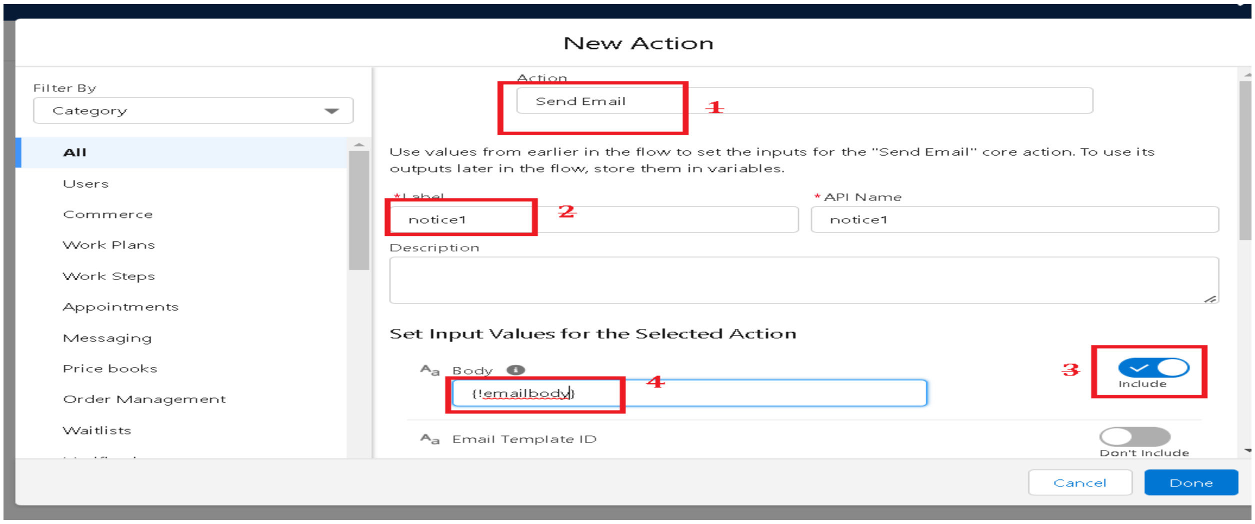
Hello {!$Record.Customer_name__c},
Thank you for coming , we are glad and considering that we provided

the best survise.
RECEPIT DETAILS :
Customer name : {!$Record.Customer_name__c}
Amount paid by Customer : {!$Record.Amount_Paid__c}
Vehicle type : {!$Record.Vehicle_type__c}
Fuel intake in vehicle : {!$Record.Fuel_filled_in_vehicle__c}

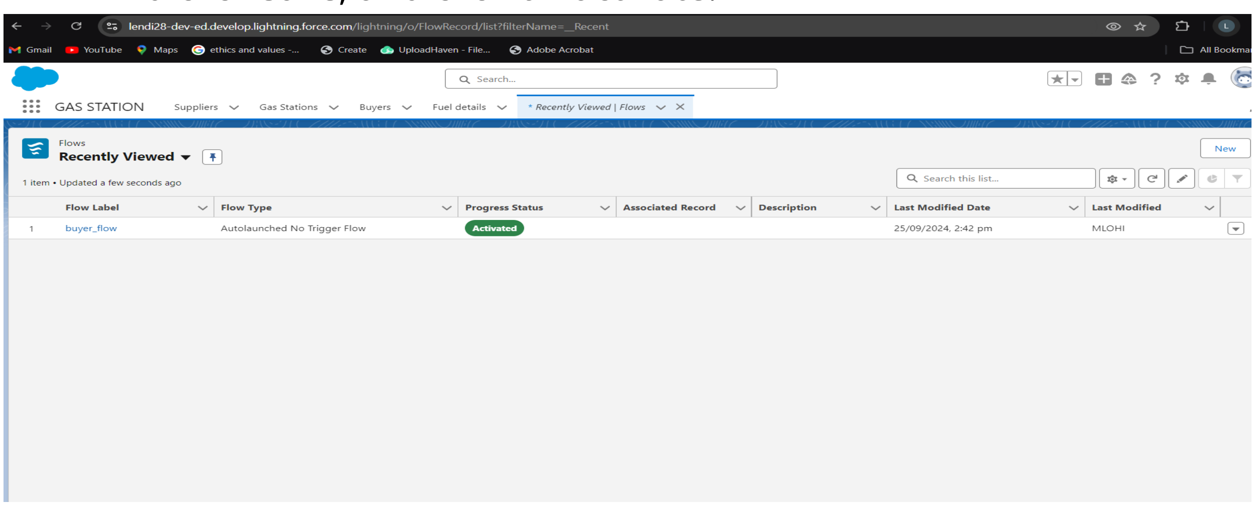
- Change the view as Rich Text ? View to Plain Text.



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



- Include recipient address list select the email form the record.
- Include subject as " welcome to gas station".
- Click done.
- Now drag the path form the start to action element.
- Click on save. Give the Flow label , Flow Api name will be autopopulated.
- And click save, and click on activate.



CONCLUSION:

- In **conclusion,** implementing a **CRM application** for a gas filling station can greatly enhance operational efficiency, streamline administrative tasks, and improve customer satisfaction. By integrating essential features like customer management, inventory control, sales and billing, employee management, and maintenance tracking, the CRM can serve as a comprehensive tool for the station's administration.
- The CRM system allows for real-time data tracking and analytics, enabling informed decision making and proactive management of resources. With **robust security** measures, compliance tracking, and integration capabilities with existing systems, the CRM ensures a seamless and secure operation of the gas station.
- Furthermore, the incorporation of customer-centric features such as loyalty programs, targeted marketing, and feedback mechanisms fosters stronger customer relationships and drives repeat business. Ultimately, a well-designed CRM for gas station administration can lead to **enhanced productivity**, reduced operational costs, and improved service quality, making the overall management of the gas filling station more efficient and effective.