

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

by

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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:

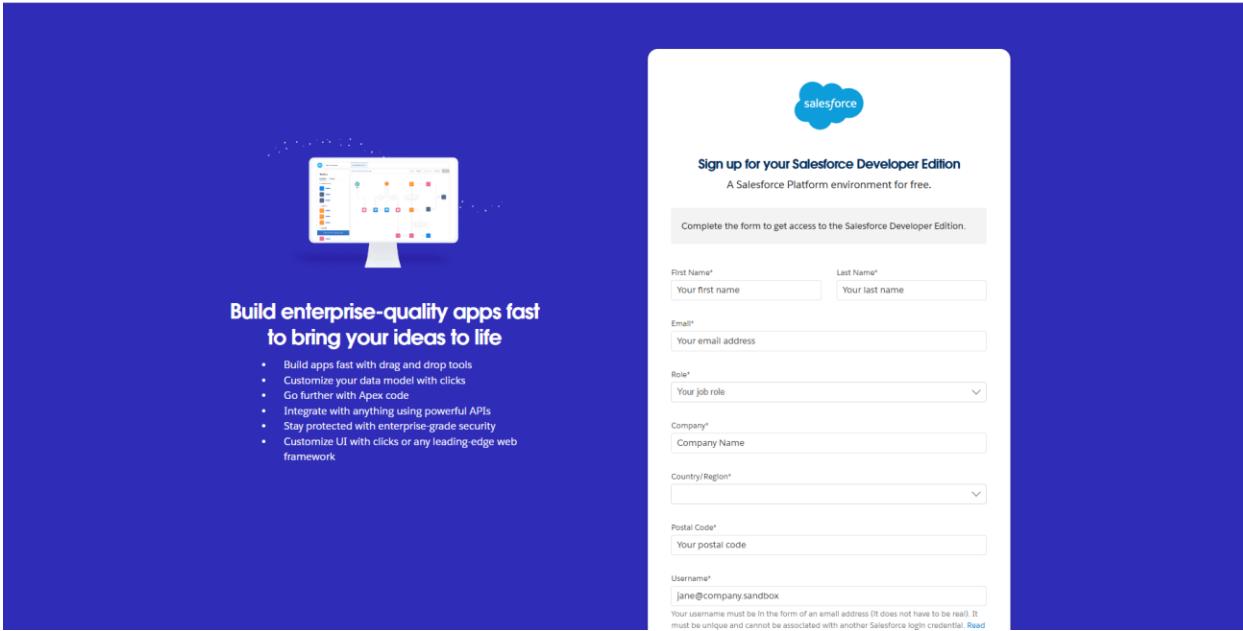
Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>

- First name & Last name
- Email
- Role : Developer
- Company : College Name
- County : India
- Postal Code : pin code

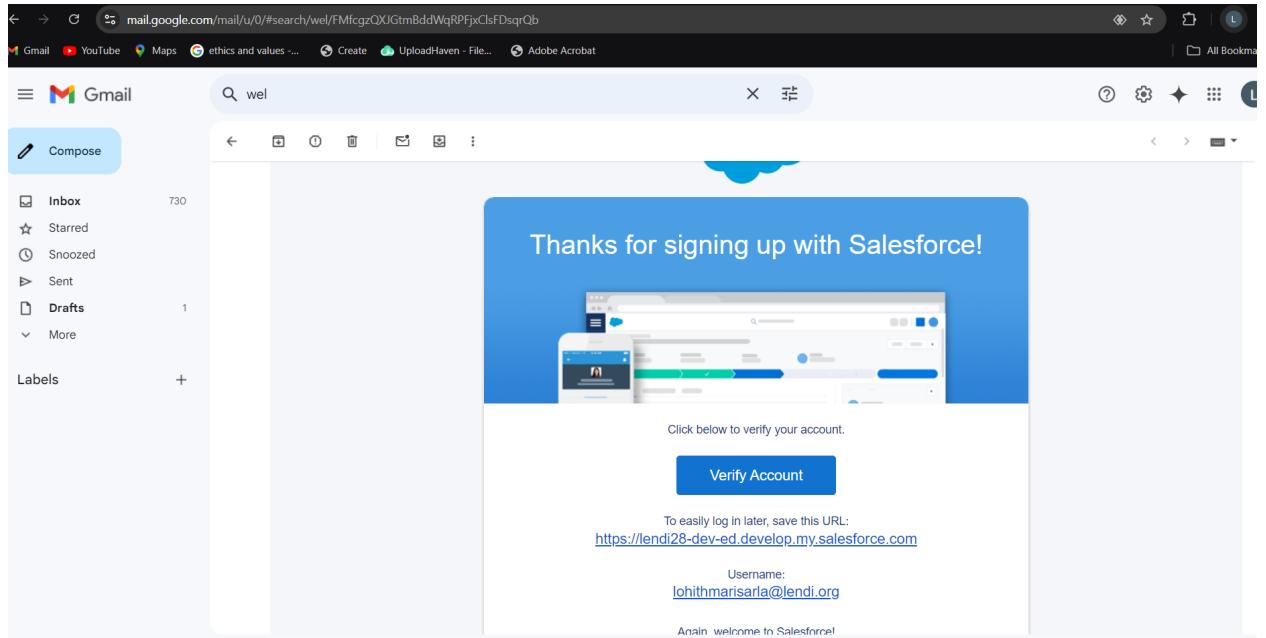
NOTE:

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.



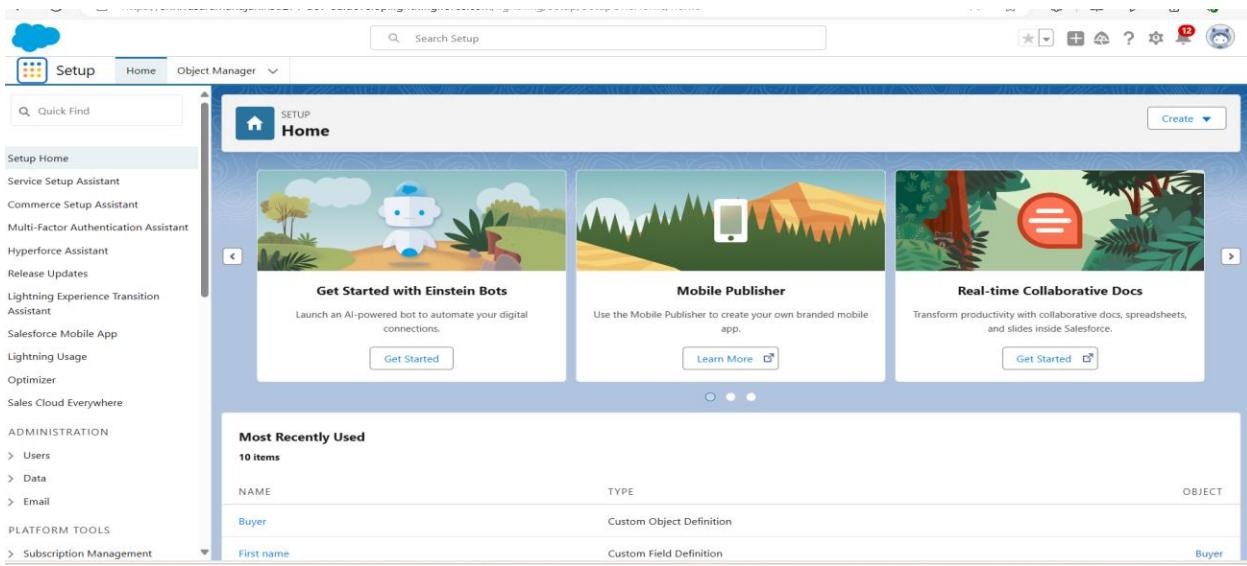
Activity 2: Account Activation:Milestone 2 - Object

- 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?

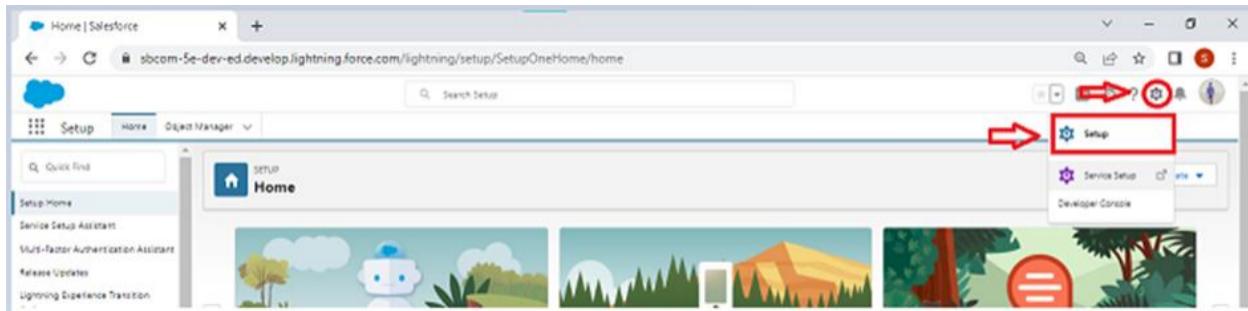
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects?

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.

New Custom Object | Salesforce

Custom Object Definition Edit

Custom Object Information

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

Label: Example: Account

Plural Label: Example: Accounts

Starts with none sound:

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

Object Name: Example: Account

Description:

Context sensitive help setting:

Content name: Account

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Example: Account Name

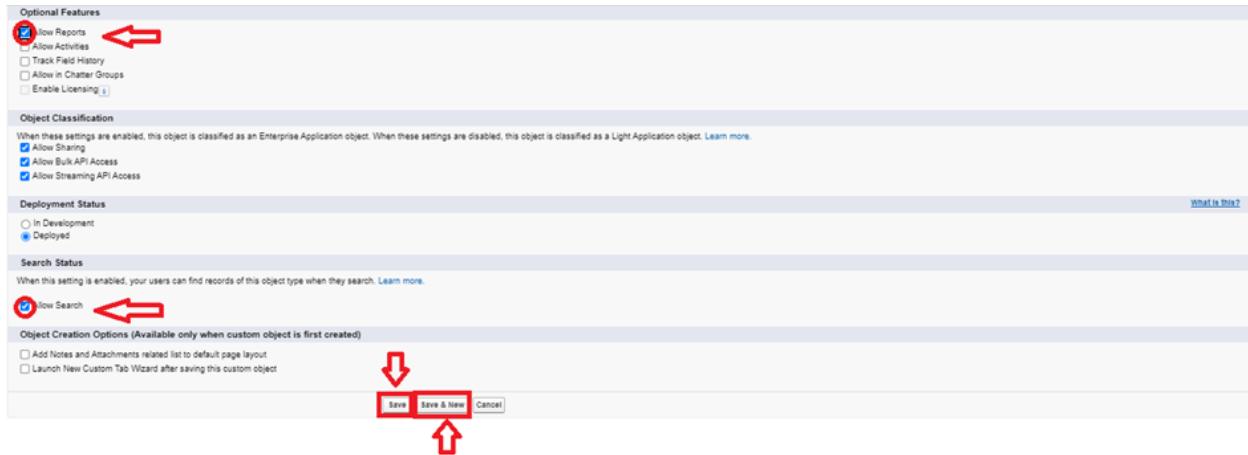
Data Type: Text

Optional Features

Allow Reports

Allow Activities

Track Field History



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

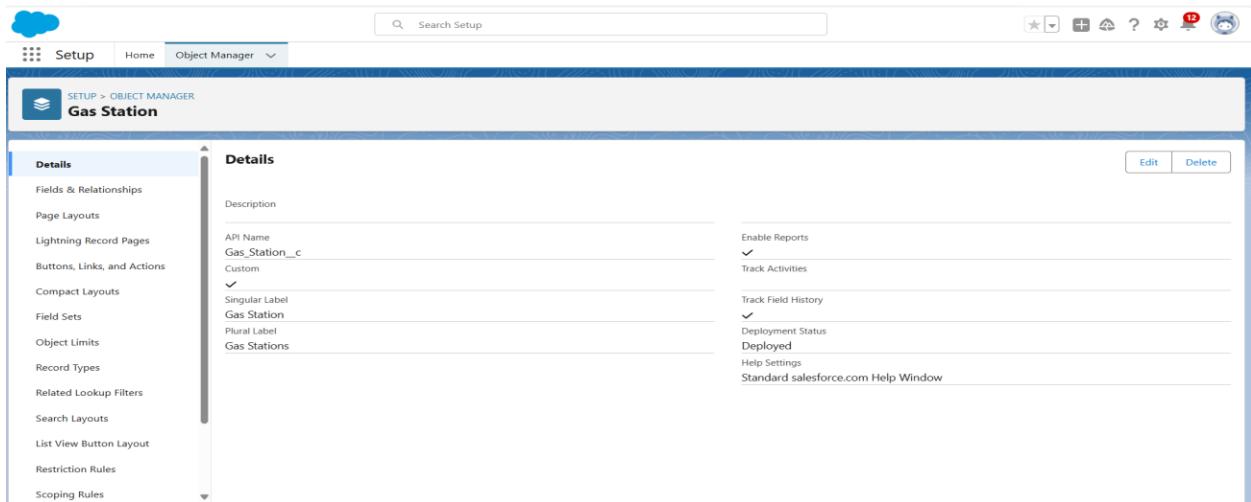
Data Type Name

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

The image displays two side-by-side screenshots of the Salesforce Setup interface, specifically the Object Manager section.

Screenshot 1: Buyer Object Details

- Left Sidebar:** Shows navigation links for Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules.
- Details Panel:**
 - Description:** API Name: Buyer_c, Custom: ✓, Singular Label: Buyer, Plural Label: Buyers.
 - Enable Reports:** ✓
 - Track Activities:** ✓
 - Track Field History:** ✓
 - Deployment Status:** Deployed
 - Help Settings:** Standard salesforce.com Help Window
- Buttons:** Edit and Delete.

Screenshot 2: Fuel details Object Details

- Left Sidebar:** Same as the first screenshot.
- Details Panel:**
 - Description:** API Name: Fuel_details_c, Custom: ✓, Singular Label: Fuel details, Plural Label: Fuel details.
 - Enable Reports:** ✓
 - Track Activities:** ✓
 - Track Field History:** ✓
 - Deployment Status:** Deployed
 - Help Settings:** Standard salesforce.com Help Window
- Buttons:** Edit and Delete.

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 :

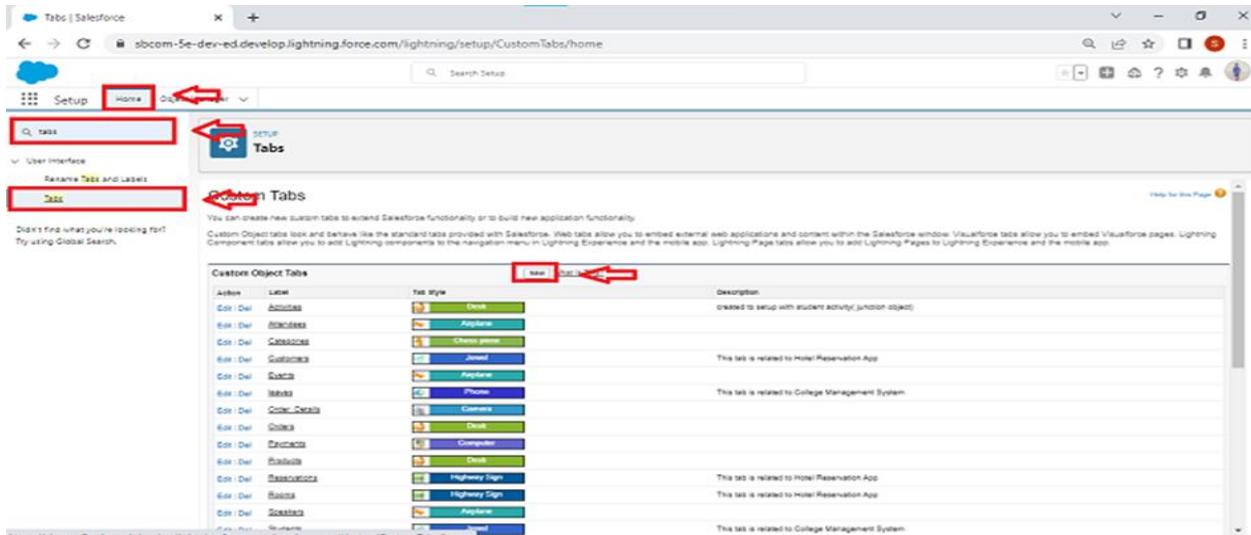
Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu. Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs.

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.

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).

Object:	<input type="text" value="Supplier"/>	Tab Style:	<input type="text" value="--None--"/>
(Optional) Choose a Home Page Custom Splash Page Custom Link:			
<input type="text" value="Supplier"/>			
Enter a short description:			
<input type="text" value="Description"/>			

[Next](#) [Cancel](#)

Tab Style Selector

Create your own style

Hide styles which are used on other tabs

Airplane	Alarm clock	Apple	Balls
Bank[1]	Bell	Big top	Boat[1]
Books	Bottle	Box	Bridge
Building	Building Block	Caduceus	Camera
Can	Car	Castle	CD/DVD
Cell phone	Chalkboard	Chess piece	Chip
Circle	Compass	Computer	Credit card
CRT TV	Cup	Desk[1]	Diamond
Dice	Factory	Fan	Flag
Form	Gears	Globe	Guitar
Hammer	Hands	Handsaw	Headset
Heart[1]	Helicopter	Hexagon	Highway Sign
Hot Air Balloon	Insect	IP Phone	Jewel
Keys	Laptop	Leaf	Lightning

Save **Cancel**

Step 3. Add to Custom Apps

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	<input type="checkbox"/> Include Tab
Platform (standard__Platform)	<input type="checkbox"/>
Sales (standard__Sales)	<input type="checkbox"/>
Service (standard__Service)	<input type="checkbox"/>
Marketing (standard__Marketing)	<input type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>
	<input type="checkbox"/>
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"/>

Append tab to users' existing personal customizations

Previous **Save** **Cancel**

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 .

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected under 'User Interface'. The 'Custom Tabs' section is displayed, showing a table of custom object tabs. The table includes columns for Action, Label, Tab Style, and Description. The data in the table is as follows:

Action	Label	Tab Style	Description
Edit Del	Buyers	Apple	
Edit Del	Fuel details	Balls	
Edit Del	Gas Stations	Alarm clock	
Edit Del	Suppliers	Airplane	

MILESTONE-4:THE LIGTHNING APP

what is Lightning App?

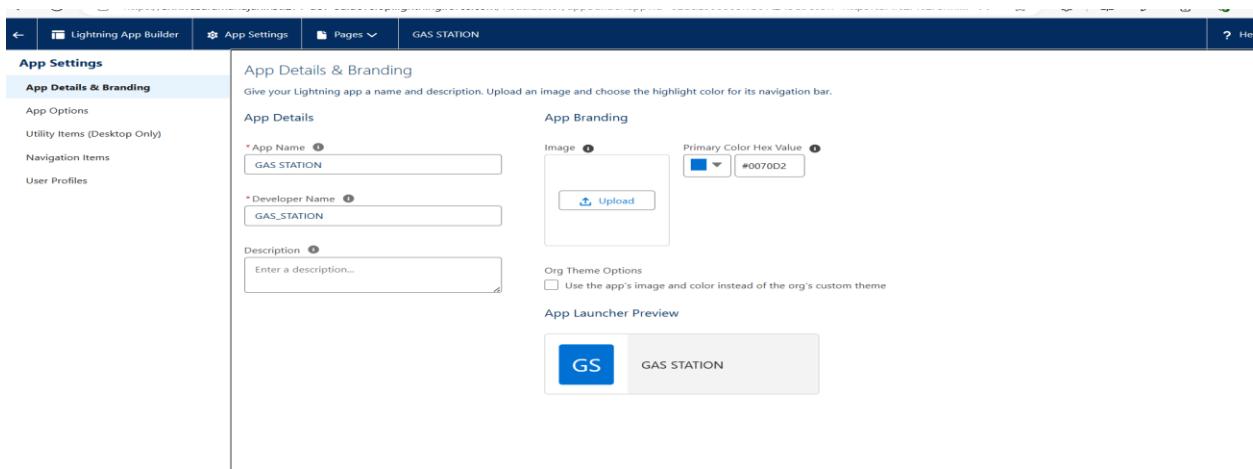
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom color and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



MILESTONE-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.

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

The screenshot shows the Salesforce setup interface for creating a new object. The top navigation bar says 'SETUP > OBJECT MANAGER'. The left sidebar has a 'Supplier' section under 'Fields & Relationships'. The main area shows a table for 'Supplier Field' with one row for 'Supplier Name'. The 'Field Information' section shows 'Field Label: Supplier Name', 'Data Type: Text(80)', and other details like 'Data Owner' and 'Data Sensitivity Level'. The 'Validation Rules' section is empty. A 'Help for this Page' link is in the top right.

- **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.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar labeled 'Search Setup'. Below the navigation is a breadcrumb trail 'SETUP > OBJECT MANAGER' followed by 'Gas Station'. On the left, a sidebar lists various setup categories like 'Details', 'Fields & Relationships' (which is selected), 'Page Layouts', etc. The main content area displays the 'Gas Station Field' configuration for the 'Gas Station Name' field. It shows the field label 'Gas Station Name', data type 'Auto Number', and display format 'Gas-[000]'. There are also tabs for 'Set Field-Level Security' and 'View Field Accessibility'.

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 ".

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 ↑

Previous Next Cancel

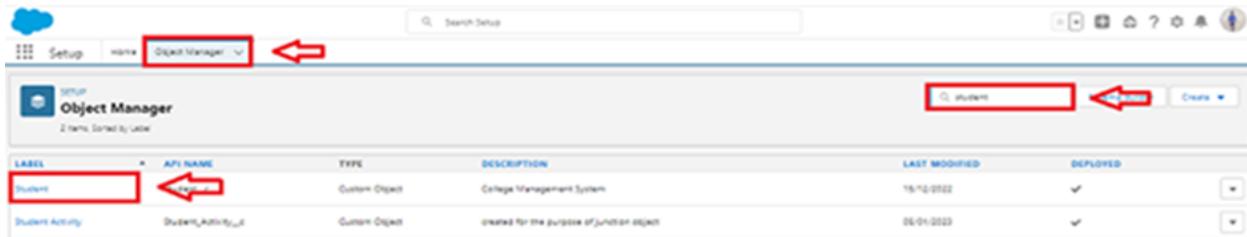
4. Field Name will be auto populated, and click on Next? Next ? Save.

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

The screenshot shows the Salesforce Object Manager interface for the 'Student' object. The 'Fields & Relationships' tab is selected. A red box highlights this tab, and a red arrow points to the 'New' button in the top right corner of the list view.

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

The screenshot shows the 'Data Type' configuration step. A red box highlights the 'Roll-Up Summary' option under the 'Data Type' section. A red arrow points to the 'Next' button in the top right corner.

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

The screenshot shows the 'Step 2. Enter the details' configuration step. A red box highlights the 'Field Label' input field containing 'Sum of Fuel supplied'. A red arrow points to the 'Next' button in the top right corner.

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

Select Object to Summarize

Master Object: Supplier
Summarized Object: Fuel details

Select Roll-up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate: Fuel supplied

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.

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.

Step 2. Choose output type

Step 2 of 5

Field Label (highlighted with red box)

Field Name (highlighted with red box)

Previous Next Cancel

Auto add to custom report type Add this field to existing custom report types that contain this entity [\(i\)](#)

Formula Return Type

None Selected Select one of the data types below.

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

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

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

Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `(Next = NOW() + 4)`

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

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

5. 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 [▼](#)

FuelAvailable_in_bunk(Number) = (highlighted with red box)

Functions

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

[Insert Selected Function](#)

7. Creating the Formula field in Buyer Object

Note : check wheather that the fields that mentioned in the formula field are created are not , if not

go to activity 9 and create that fields mentioned in Buyer object

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

9. Click on fields & relationship ? click on New.

10. Select Data type as “Formula” and click Next.

11. Give Field Label and Field Name as “Customer Name” and select formula return type as

"TEXT" and click next.

12. Insert field formula should be : First_Name_c + '' + Last_Name_c

13. click "Check Syntax" and Save.

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.

Step 2. Choose output type

Step 2 of 5

Previous Next Cancel

Field Label

Field Name

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

Formula Return Type

None Selected Select one of the data types below.

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

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

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

Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `New = NOW() + 4`

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

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

5. Insert fields formula should be :

`Fuel_filled_in_vehicle_c * Gas_Station_name_r.Fuel_price_liter_c`

6. Under Advanced Formula write down the formula and click "Check"

Syntax" and Save.

Formula Editor

Formula Return Type: Currency
Decimal Places: 2

Example: Gross Margin = Amount - Cost [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: ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN

Insert Selected Function

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.

Step 2. Enter the details Step 2 of 4

Field Label: Vehicle type

Values:

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

Two Wheeler
Three Wheeler
Four Wheeler
Six Wheeler
Eight Wheeler
Others

Display values alphabetically, not in the order entered
 Use first value as default value

Restrict picklist to the values defined in the value set

Field Name: Vehicle_type

Description:

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.

Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

Field Label: Vehicle type

Values:

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

Two Wheeler
Three Wheeler
Four Wheeler
Six Wheeler
Eight Wheeler
Others

Display values alphabetically, not in the order entered

Use first value as default value

Restrict picklist to the values defined in the value set

Field Name: Vehicle_type

Description:

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:

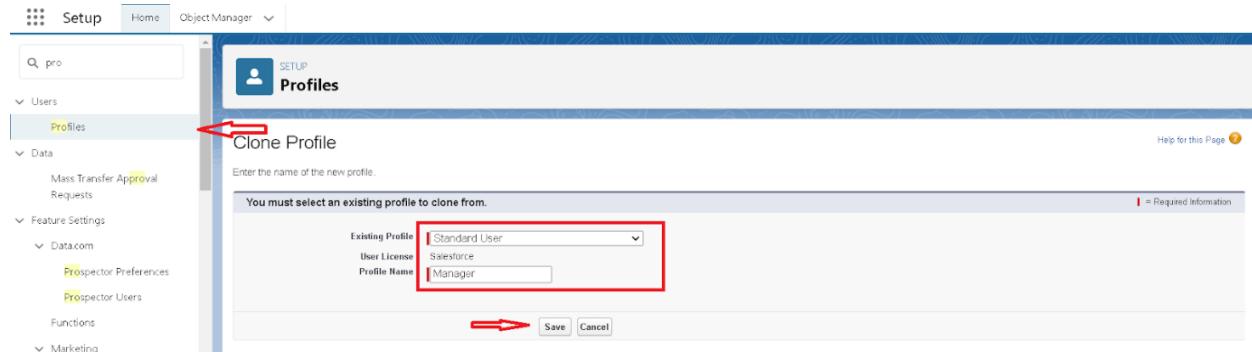
Custom ones defined by us.

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.

Profile Manager

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) | [Enabled External Credential Principal Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[0\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) | [Enabled Custom Permissions \[0\]](#)

Profile Detail	
Name	Manager
User License	Salesforce
Description	
Created By	sunny_1.. 13/06/2023, 2:40 pm
Modified By	sunny_1.. 13/06/2023, 2:40 pm

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

Custom App Settings

	Visible	Default	Visible	Default	
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>
Gas Station (Gas_Station)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>			

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

Custom Object Permissions

	Basic Access						Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify 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
- Obfuscate 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.

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.

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"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
Fuel details	<input checked="" 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 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"/>			

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 works Give Label as “Manager” and Role name gets auto populated. Then click on Save.

The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. The 'Manager' role is highlighted. The 'Role Detail' section displays the role's label ('Manager') and its reporting structure ('This role reports to CEO'). The 'Users in Manager Role' section shows a single user assigned to this role. The sidebar on the left lists various sales-related features like Sales, Contracts, Opportunities, and Cases.

Activity 2: Creating another roles

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

The screenshot shows the Salesforce Setup interface with the 'The smartbridge' organization selected. A tree view displays various roles under the 'Add Role' category. The 'Manager' role is expanded, showing its own 'Add Role' button, which is highlighted with a red box. Other visible roles include CEO, CFO, COO, SVP_Customer Service & Support, SVP_Human Resources, and SVP_Sales & Marketing.

- 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.

Role Edit
New Role

Help for this Page ?

Role Edit

Label: Sales executive

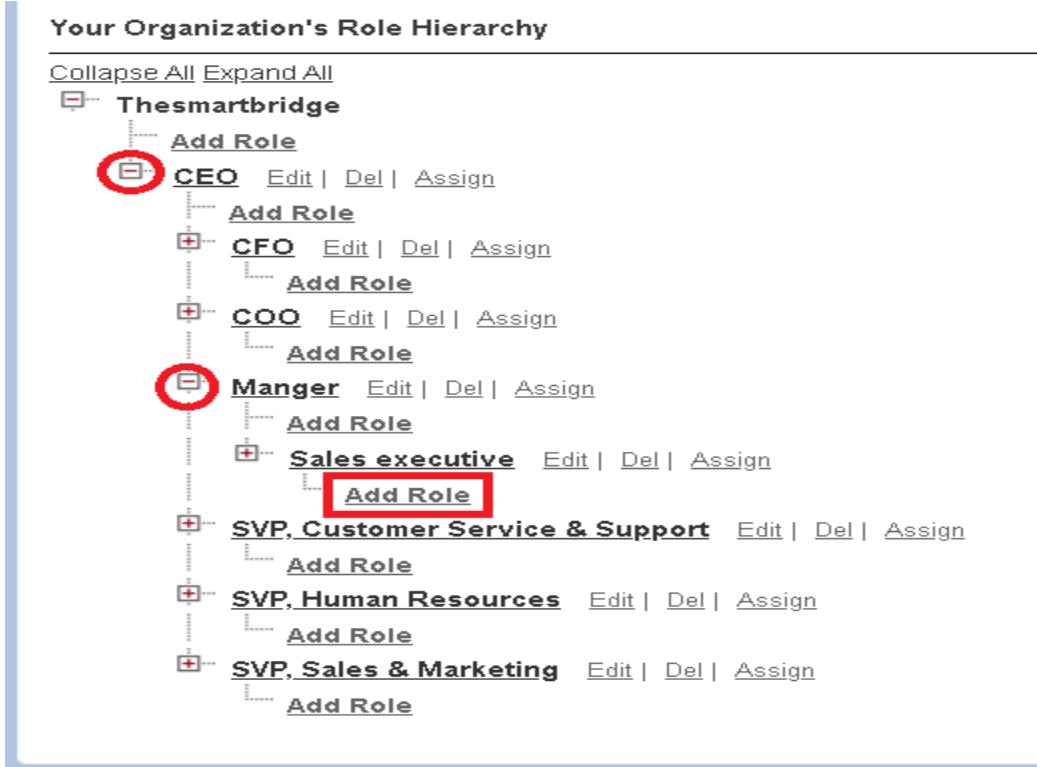
Role Name: Sales_executive

This role reports to: Manager

Role Name as displayed on reports:

Save | Save & New | Cancel

- 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.

The screenshot shows the 'Role Edit' page for creating a new role. The 'Label' field contains 'Sales person'. The 'Role Name' field contains 'Sales_person'. The 'This role reports to' field has a dropdown menu open, showing 'Sales executive' as the selected option. The 'Role Name as displayed on reports' field is empty. At the bottom, there are three buttons: 'Save' (highlighted with a red arrow), 'Save & New', and 'Cancel'.

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Expert	Chatter	chatty.00dd00000cgbwpuu3.oeeplodrkcyv@chatter.salesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	LOHITH_MARISARLA	ML_OHI	lohitmarisarla@lendi.org	System Administrator	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Mikaelson_Niklaus		nmilka@gmail.com	Manager	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	Smith_John	jmit	jmit533@gmail.com	sales executive	<input checked="" type="checkbox"/>	sales executive
<input type="checkbox"/>	Ten_Ben	btben	btben953246@gmail.com	sales person	<input checked="" type="checkbox"/>	sales person
<input type="checkbox"/>	User_Integration	Integ	Integration@00dd00000cgbwpuu3.com	Analytics Cloud Integration User	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00dd00000cgbwpuu3.com	Analytics Cloud Security User	<input checked="" type="checkbox"/>	Analytics Cloud Security User

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

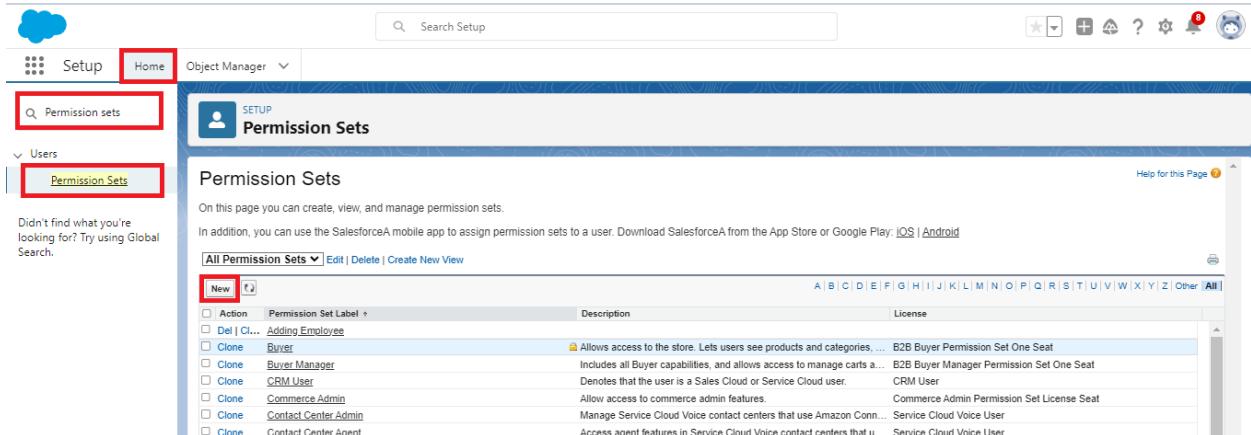
MILESTONE-10:PERMISSION SETS

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.



The screenshot shows the Salesforce Setup interface. The left sidebar has 'Setup' selected. Under 'Users', 'Permission Sets' is selected and highlighted with a red box. A sub-menu for 'Permission Sets' is open, also highlighted with a red box. The main content area is titled 'Permission Sets'. It says 'On this page you can create, view, and manage permission sets.' and 'In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download Salesforce from the App Store or Google Play: [iOS](#) | [Android](#)'. There is a 'New' button highlighted with a red box. Below it is a table with columns 'Action', 'Permission Set Label', 'Description', and 'License'. The table lists several permission sets, each with a checkbox and a brief description. At the bottom of the table, there is a navigation bar with letters A-Z and a 'All' link.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Adding Employee	Allows access to the store. Lets users see products and categories, ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer	Includes all buyer capabilities, and allows access to manage carts a...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Buyer Manager		CRM User
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Conn...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that u...	Service Cloud Voice User

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

Enter permission set information

Label: P1

API Name: P1

Description: additional access for sales executive profile

Session Activation Required:

Save Cancel

= Required Information

- Under Apps Select object settings

Apps

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes
- Visualforce Page Access**
Permissions to execute Visualforce pages
- 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

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

Setup Home Object Manager

permis

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

SETUP Permission Sets

Permission Set: P1

Find Settings | Clone | Edit Properties | Manage Assignments | View Summary

Permission Set Overview

Description:

License:

Session Activation Required:

Permission Set Groups Added To: 0

API Name: P1
Nameless Profile
Created By: Manoj Khamatkar 12/08/2024, 8:17 pm
Last Modified By: Manoj Khamatkar 12/08/2024, 8:15 pm

Video Tutorial | Help for this Page

Apps

- Assigned Apps
- Assigned Connected Apps
- Object Settings
- App Permissions
- Apex Class Access
- Visualforce Page Access
- External Data Source Access
- Flow Access
- Named Credential Access
- Custom Permissions
- Custom Metadata Types

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform [Learn More](#)

MILESTONE-11:SETUP FOR OWD

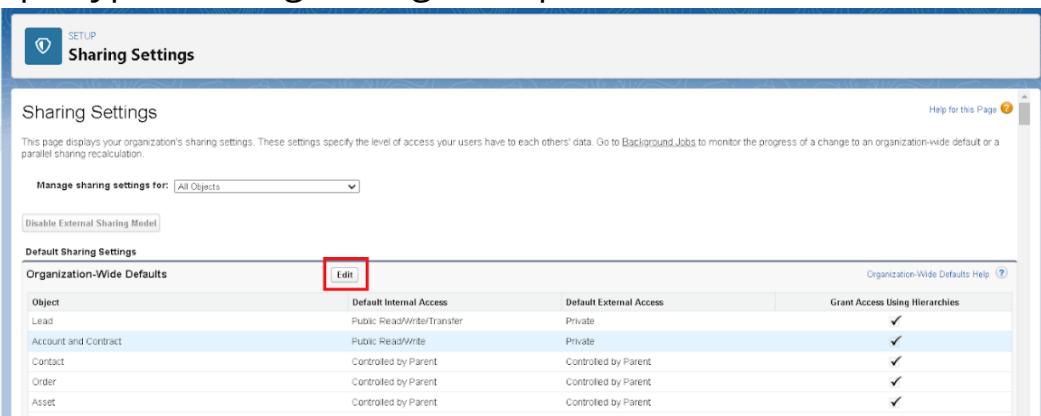
What is Setup for OWD?

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.



The screenshot shows the 'Sharing Settings' page in the Salesforce setup. The sidebar has a 'Sharing' section with a red arrow pointing to the 'Sharing Settings' link. The main 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'. There are several rows for different objects like Lead, Account and Contract, Contact, Order, and Asset. A red box highlights the 'Edit' button in the top right corner of the table header. The status bar at the bottom right says 'Organization-Wide Defaults Help'.

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 interface for security settings. It includes dropdown menus for various objects like Work Plan Template, Work Step Template, Work Type, Work Type Group, Gas Station, and Supplier. Under 'Work Type Group', the 'Gas Station' dropdown is set to 'Public Read Only'. The 'Supplier' dropdown is also set to 'Public Read Only'. At the bottom, there are several checkboxes for 'Other Settings' such as Standard Report Visibility, Manual User Record Sharing, Manager Groups, Secure guest user record access, and Require permission to view record names in lookup fields. The 'Save' button is highlighted with a red box.

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

MILESTONE-12:USER ADOPTION

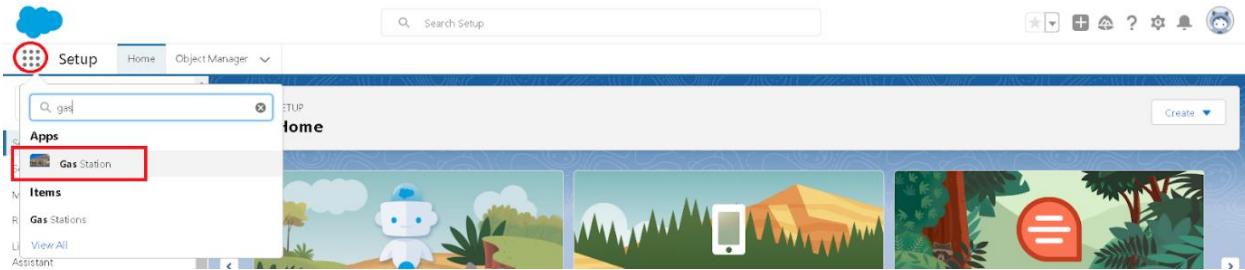
What is USER ADOPTION?

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 ".

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

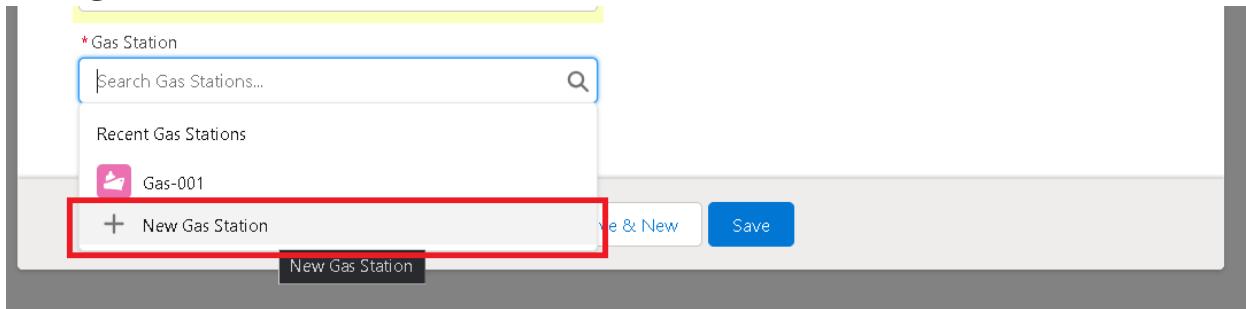
Information

* supplier Name

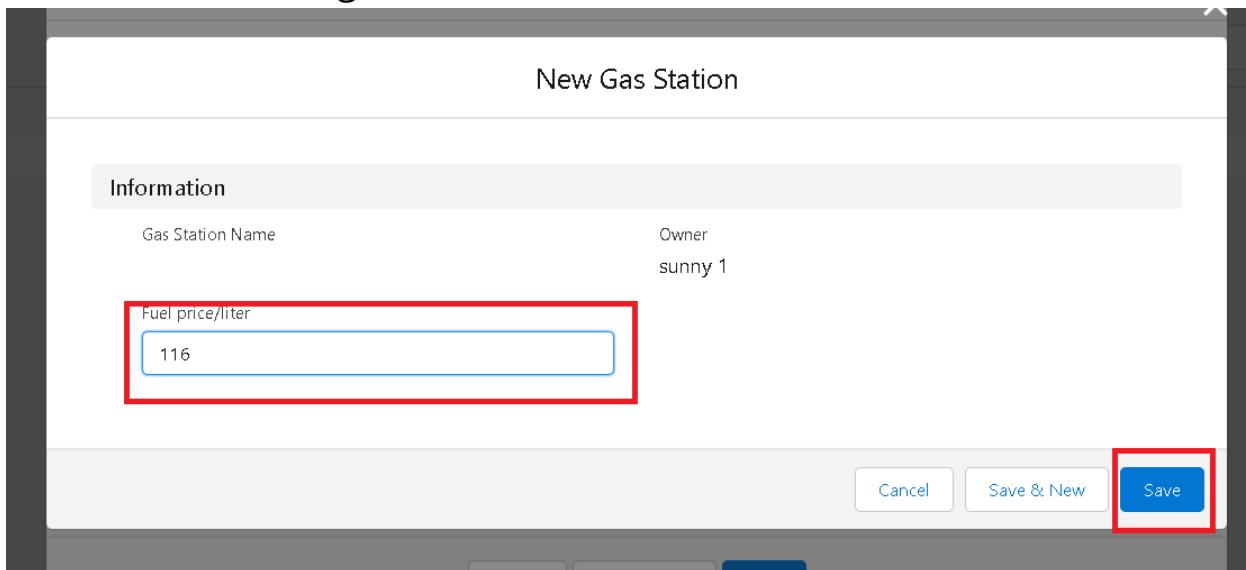
Owner

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.

Related **Details**

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

Activity 2: View a record

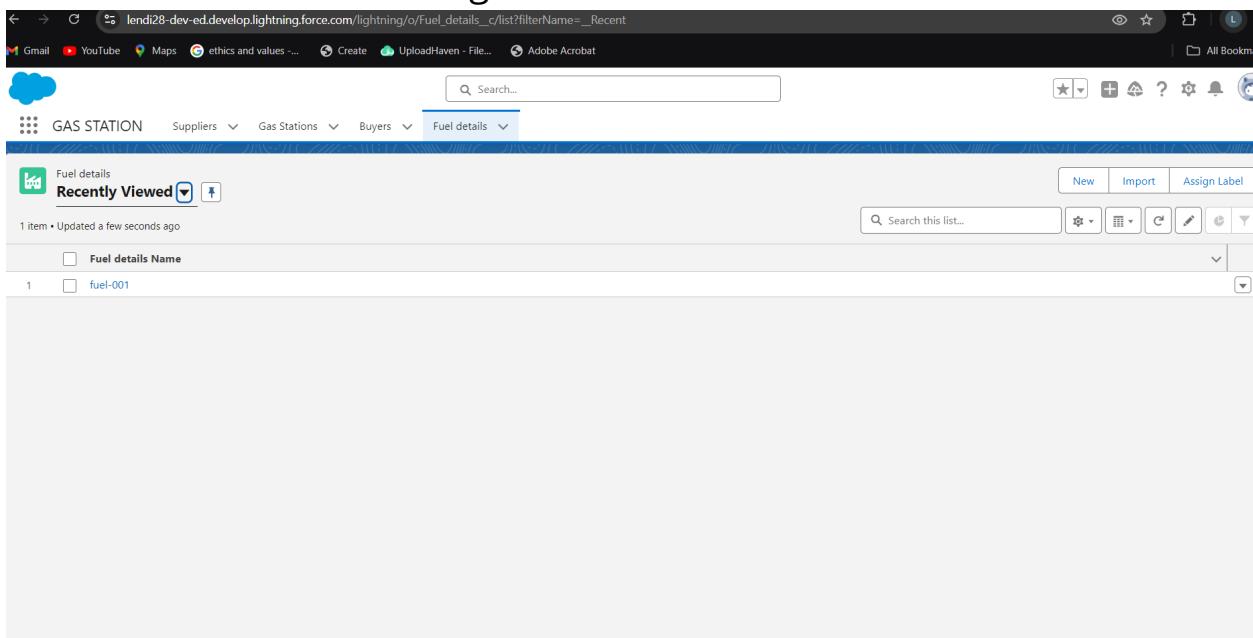
To create a record in junction object follow these steps

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.



The screenshot shows a Salesforce Lightning interface for the 'Fuel details' list view. The URL in the browser is lend28-dev-ed.lightning.force.com/lightning/o/Fuel_details__c/list?filterName=_Recent. The page header includes the Salesforce logo, user name, and various links like Gmail, YouTube, Maps, etc. The main navigation bar has tabs for GAS STATION, Suppliers, Gas Stations, Buyers, and Fuel details. The 'Fuel details' tab is selected. A 'Recently Viewed' section shows one item: 'fuel-001'. The main content area displays a table with columns for Fuel details Name, showing the single record 'fuel-001'. The bottom right corner of the table has a delete icon.

- This page shows the existing records.

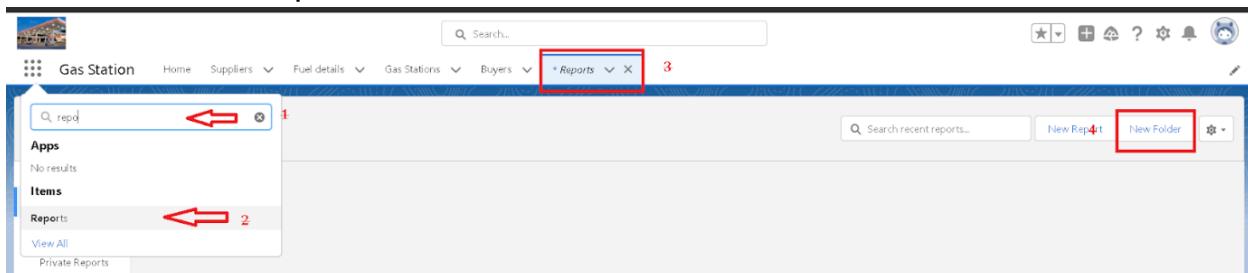
MILESTONE-13:REPORTS

What is a Report?

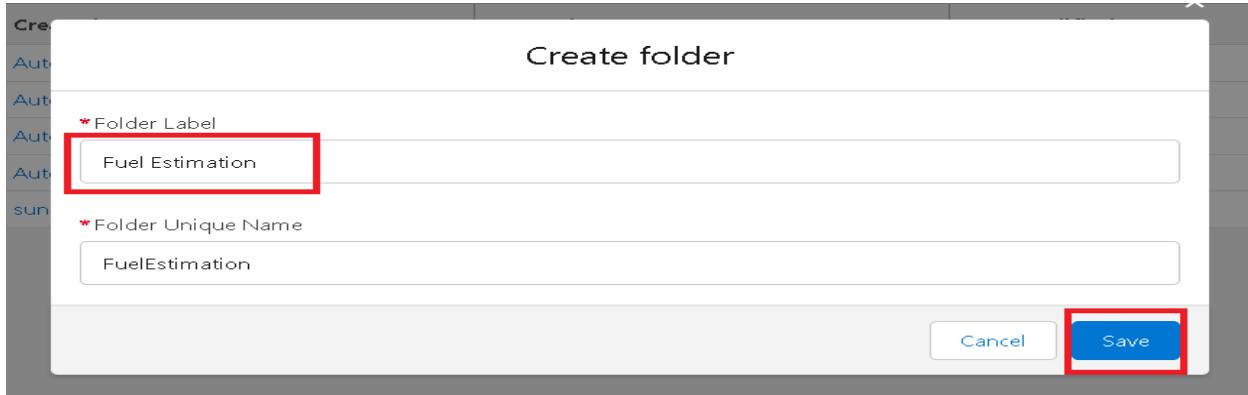
In Salesforce, Reports are a powerful tool for analyzing and displaying data stored in the system. Salesforce reports allow users to collect, filter, and present data in meaningful ways, helping to make data-driven decisions.

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.

The screenshot shows the 'Reports' section of the Gas Station app. On the left, there's a sidebar with categories: REPORTS, FOLDERS, and FAVORITES. Under FOLDERS, 'All Folders' is selected, indicated by a red box labeled '1'. In the main area, there's a table listing various reports. One row for 'Fuel Estimation' has a context menu open, with the 'Share' option highlighted by a red box labeled '4'. Other options in the menu include 'Favorite', 'Rename', and 'Delete'. Red boxes labeled '2' and '3' also point to the 'Fuel Estimation' row in the table.

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.

The screenshot shows the 'Share folder' dialog box. In the 'Share With' section, 'Roles' is selected, indicated by a red box labeled '1'. A search bar contains the text 'Manager', indicated by a red box labeled '2'. To the right, the 'Access' dropdown is set to 'View', indicated by a red box labeled '3'. Below this, a 'Share' button is highlighted with a red box labeled '4'. At the bottom, the 'Who Can Access' section shows a user named 'sunny 1' under 'Users'. A 'Manage' button is also present. The 'Done' button at the bottom right is highlighted with a red box labeled '5'.

Activity 3: Create Report

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

The screenshot shows the 'Reports' section of the application. On the left, there's a sidebar with 'Recent' items and categories like 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports'. The main area displays a table of reports with columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. Two reports are listed: 'Employee's working on projects report' and 'Assets assigned to Employees'. At the top right of the report list, there's a 'New Report' button, which is highlighted with a red box. The top navigation bar includes icons for search, dashboard, and other app functions.

- 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' and 'All'. Under 'All', several report types are listed: Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, Price Books, Products and Assets. In the center, a search bar labeled 'Select a Report Type' has 'gas' typed into it. Below the search bar is a list of report types with their names and categories. One item, 'Gas Stations with Buyers', is highlighted with a red box. On the right, there's a 'Details' pane for the selected report type. It shows the report name 'Gas Stations with Buyers', its category 'Standard', and a large blue 'Start Report' button, which is also highlighted with a red box. There are also sections for 'Created By You' and 'Created By Others'.

- Their outline pane is opened already, 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

REPORT ▾

New Gas Stations with Buyers Report / Gas Stations with Buyers

FIELDS > Outline Filters Preview 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...
- 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	₹19,200.00
	sasuke uchiha	50	₹4,800.00
	naruto uzumaki	70	₹6,720.00
	Subtotal		2,282
	Total (7)		2,282 ₹219,072.00

Row Counts Detail Rows Subtotals Grand Total

3 Conditional Formatting

- 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.

Gas Stations with Buyers Report / Gas Stations with Buyers

Save Report

* Report Name 1

Report Unique Name 2

Report Description

Folder 4

Select Folder 3

Cancel 5 Save 5

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

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

			Amount Paid
<input type="checkbox"/> Customer name	Fuel Available in bunk	Fuel filled in vehicle	
<input type="checkbox"/> Get Cloudy (1)	78,945.00 (1)	103	11,948.00
		Subtotal	11,948.00
		103	11,948.00
<input type="checkbox"/> kia motors (1)	78,945.00 (1)	104	12,064.00
		Subtotal	12,064.00
		104	12,064.00
<input type="checkbox"/> mahindra kmur (1)	78,945.00 (1)	107	12,412.00
		Subtotal	12,412.00
		107	12,412.00
<input type="checkbox"/> Manoj K (1)	78,945.00 (1)	106	12,296.00
		Subtotal	12,296.00
		106	12,296.00
<input type="checkbox"/> manoj kumar (1)	78,945.00 (1)	105	12,180.00
		Subtotal	12,180.00
		105	12,180.00
<input type="checkbox"/> manu hor (1)	78,945.00 (1)	109	12,644.00
		Subtotal	12,644.00
		109	12,644.00
		Subtotal	
		Row Counts	<input checked="" type="checkbox"/>
		Detail Rows	<input checked="" type="checkbox"/>
		Subtotals	<input checked="" type="checkbox"/>
		Grand Total	<input checked="" type="checkbox"/>

MILESTONE-14:DASHBOARDS

What is a Dashboard?

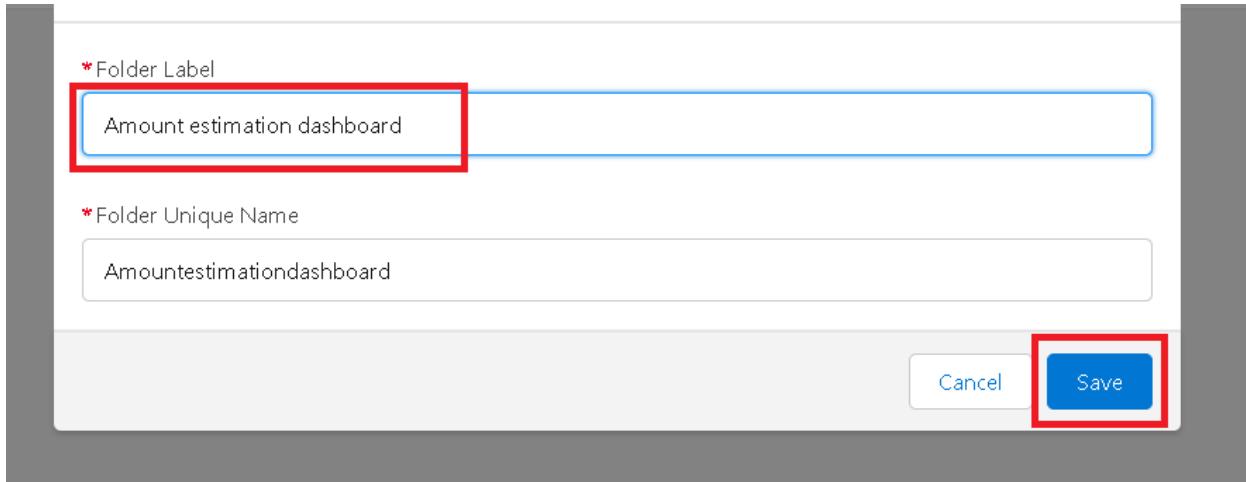
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing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

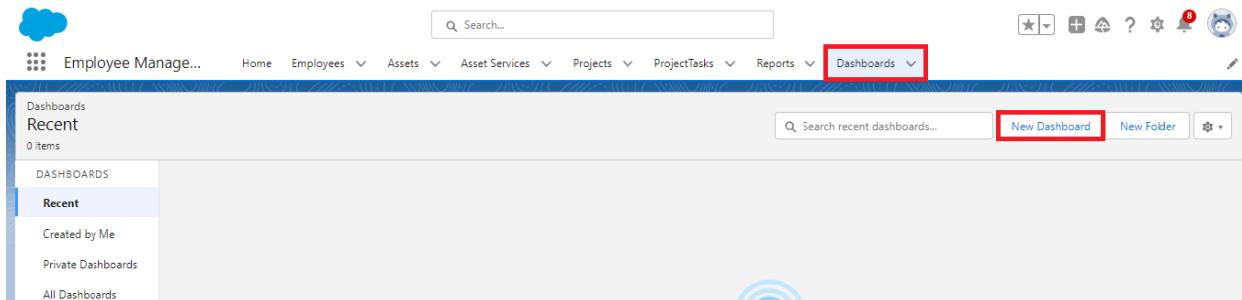


6. Follow the same steps, from milestone 12, and activity 2, and provide the sharing settings for the folder that just created.

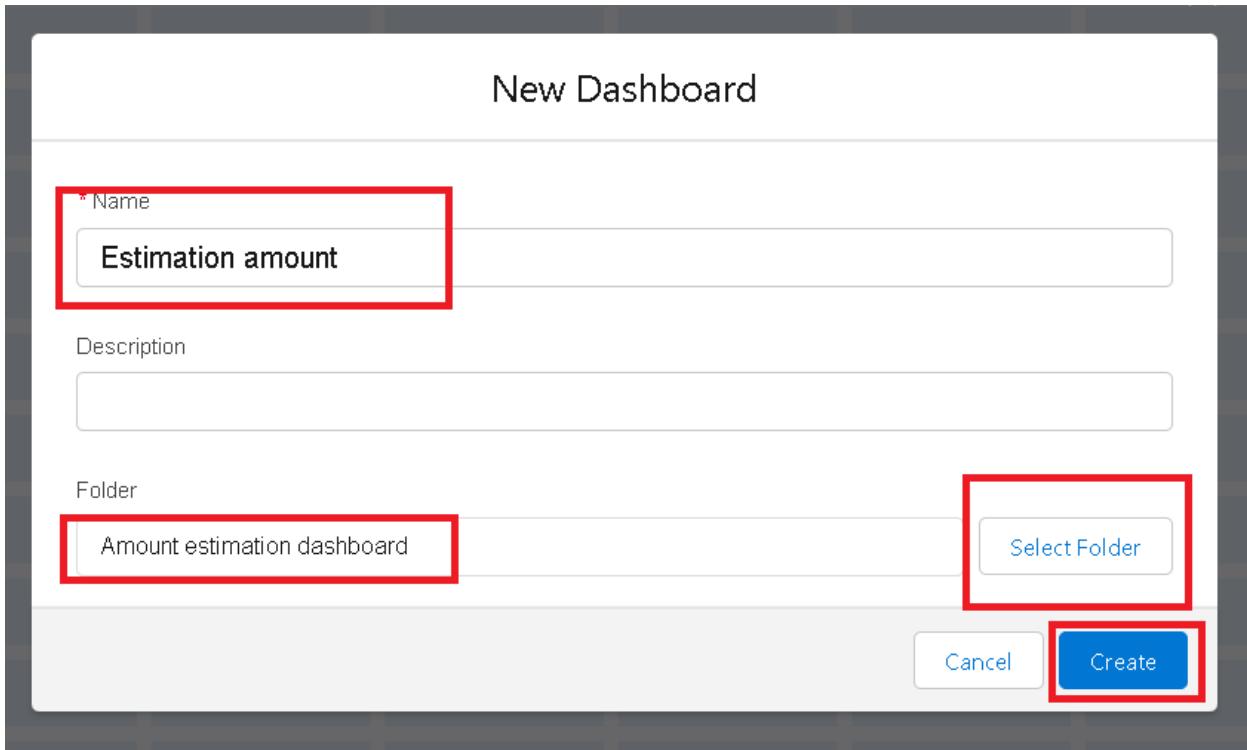
7. The above step is referred to share the amount estimation dashboard created with role as manager as performed earlier in Reports.

Activity 2: Create Dashboard

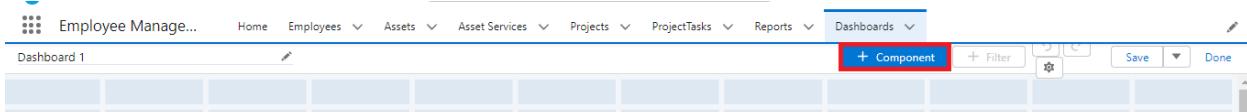
1. Go to the app ? click on the Dashboards tabs.



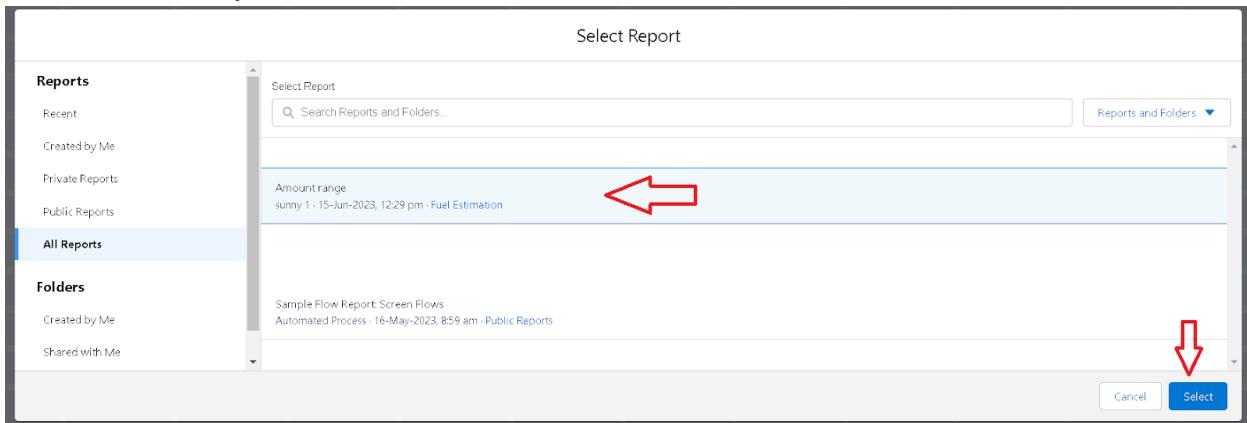
2. Give a Name and select the folder that created, and click on create.



3. Select add component.



4. Select a Report and click on select.



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

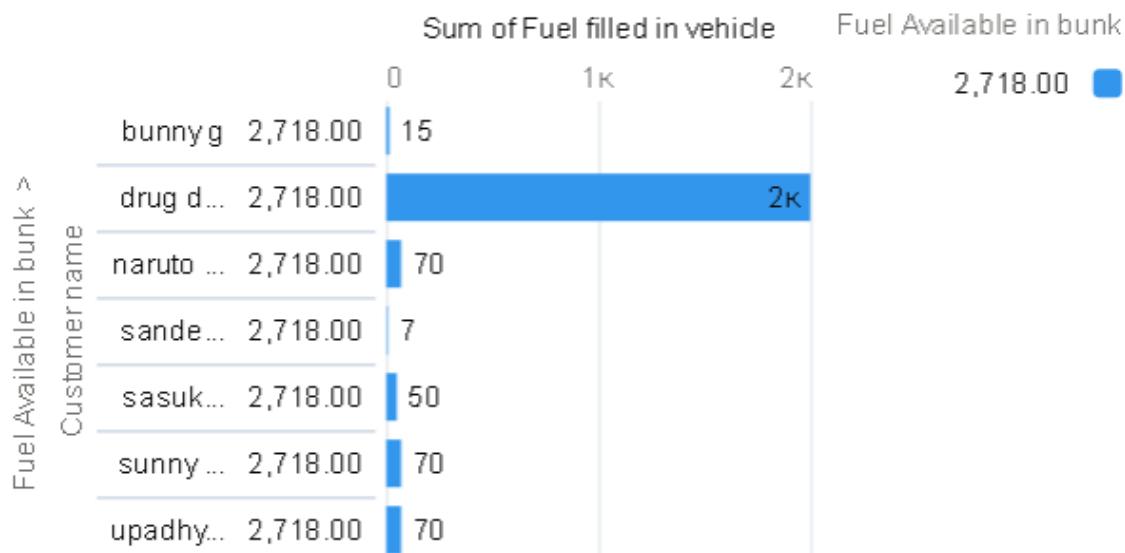


Dashboard

Estimation amount

As of 15-Jun-2023, 2:50 pm Viewing as sunny 1

Amount range



[View Report \(Amount range\)](#)

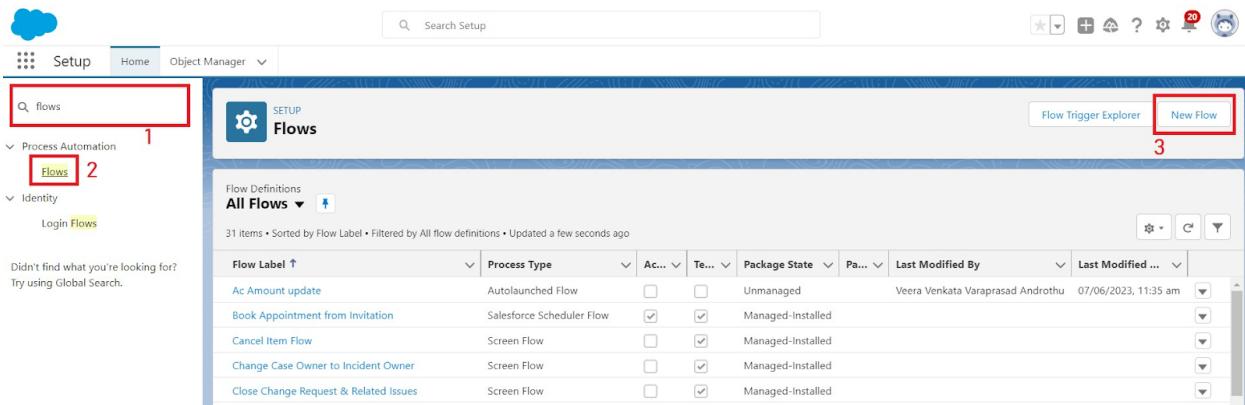
MILESTONE-15: FLOWS

What is a Flow?

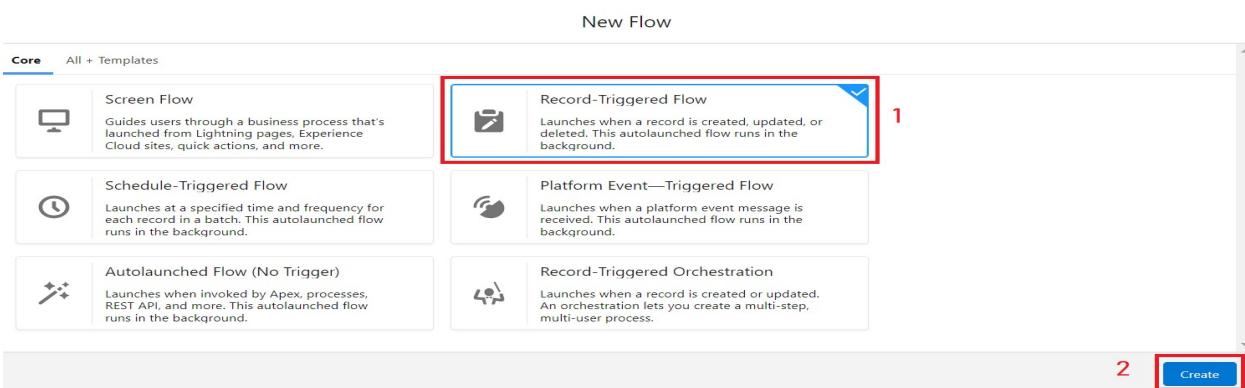
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

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 :

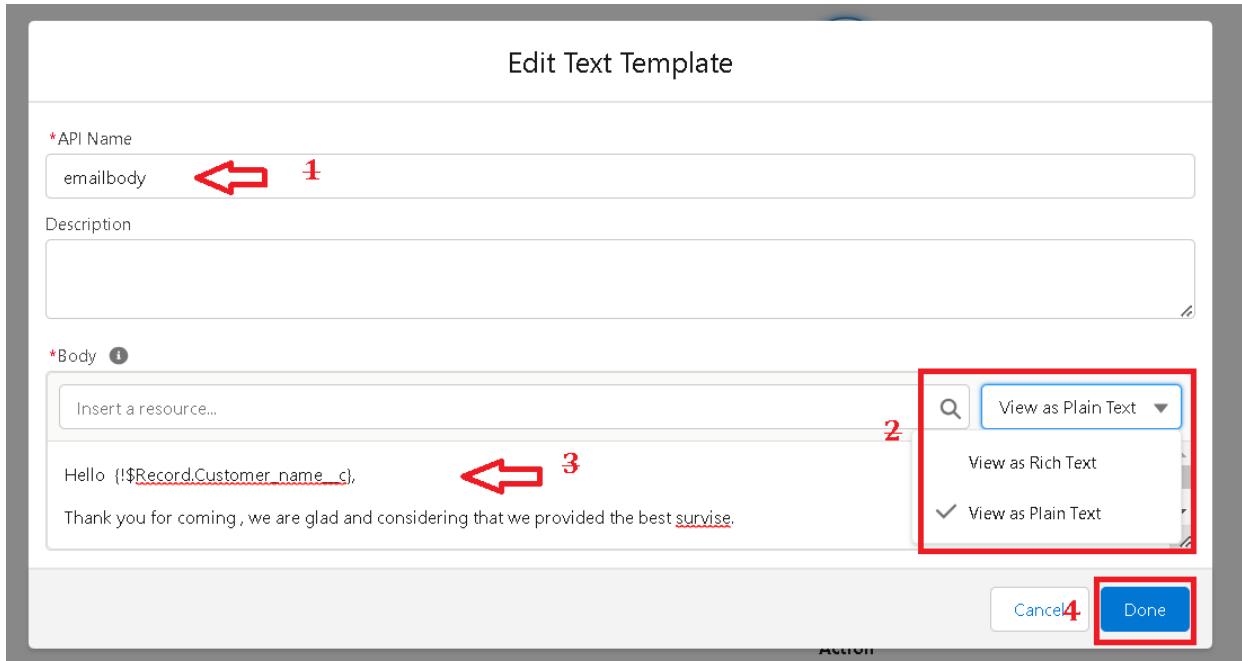
Customer name : {!\$Record.Customer_name_c}

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.

Flow Label	Flow Type	Progress Status	Associated Record	Description	Last Modified Date	Last Modified
buyer_flow	Autolaunched No Trigger Flow	Activated			25/09/2024, 2:42 pm	MLOHI

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.