

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

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.

Salesforce

Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?".

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. So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

Creating Developer Account

Creating a developer org in salesforce.

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

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

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name* Last Name*

Email*

Role*

Company*

1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code

Username : should be a combination of your name and company

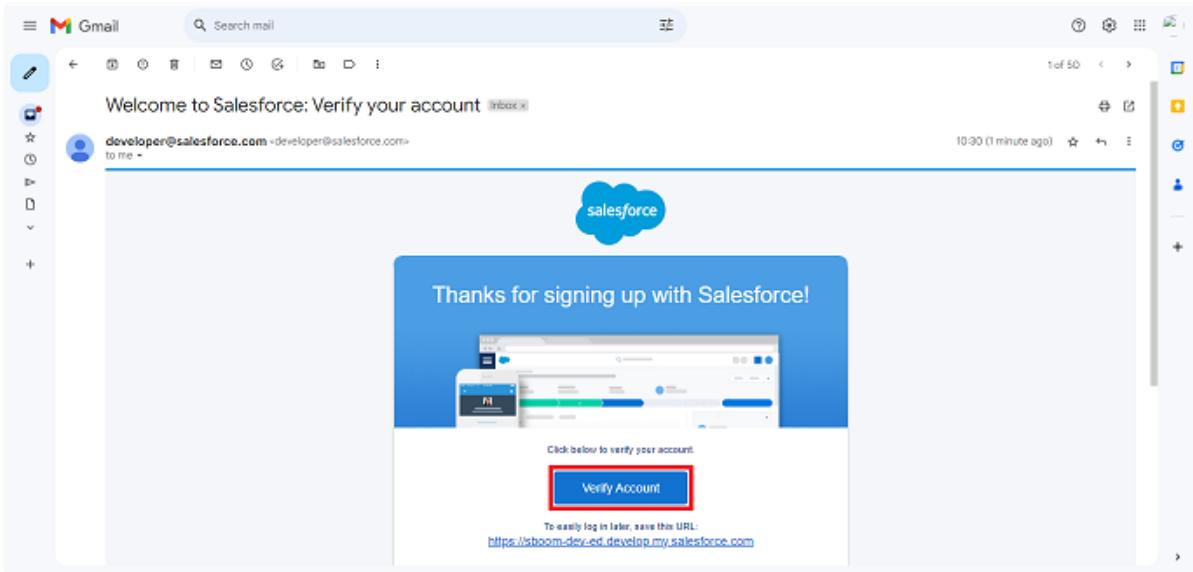
This need not be an actual email id, you can give anything in the format :

username@organization.com

Click on sign me up after filling these.

Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



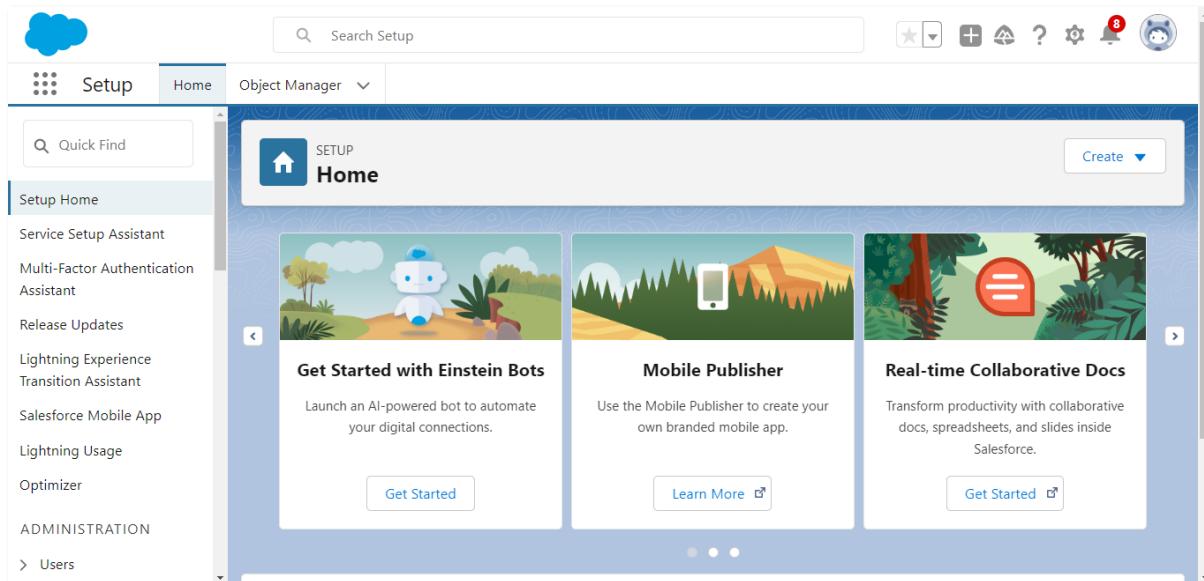
2. Click on Verify Account

3. Give a password and answer a security question and click on change password.

The screenshot shows a "Change Your Password" form. At the top, it says "Enter a new password for lead@sb.oom. Make sure to include at least:" followed by three requirements with green checkmarks: "8 characters", "1 letter", and "1 number". Below these requirements is a red box containing the following fields:

- * New Password: A text input field containing "....." with a "Good" status message to its right.
- * Confirm New Password: A text input field containing "....." with a "Match" status message to its right.
- Security Question: A dropdown menu showing "In what city were you born?"
- * Answer: A text input field containing "asdfghjkl".
- A large blue "Change Password" button at the bottom.

4. when you will redirect to your salesforce setup page.



Object

What Is an Object?

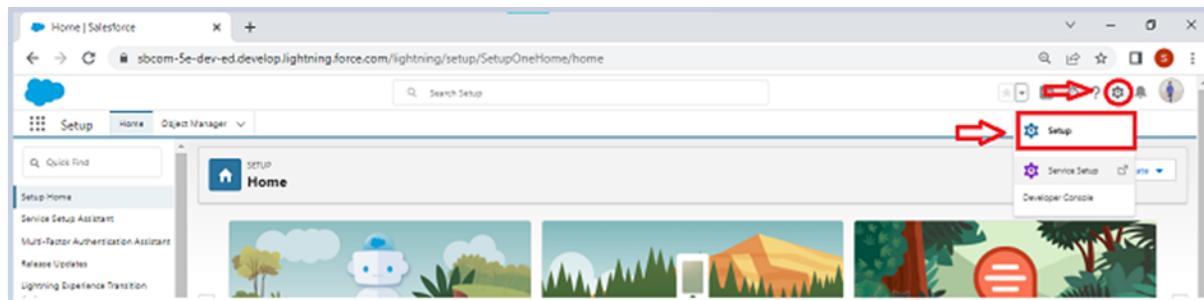
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

Salesforce objects are of two types:

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

To Navigate to Setup page:

Click on gear icon ? click setup.



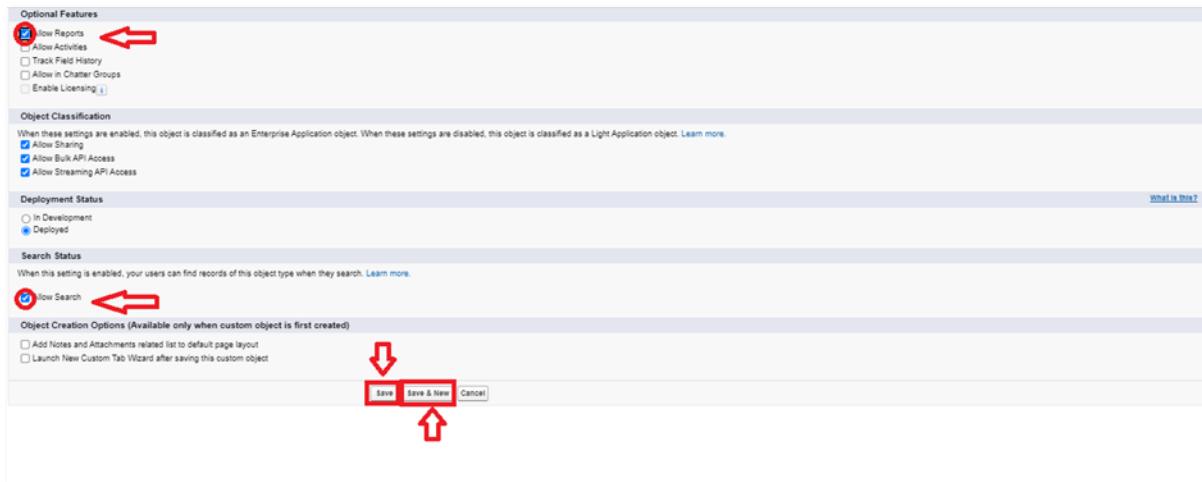
To create an object:

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

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup' and 'Object Manager'. Below it is a search bar labeled 'Search Setup'. On the right side of the header, there are several icons: a star, a plus sign, a question mark, a gear, a bell, and a user profile. A large black arrow points from the text above to the 'Object Manager' button. To the right of the main content area, there are buttons for 'Create' and 'Custom Object', with the 'Custom Object' button circled in black. The main content area displays a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, and LAST MODIFIED. The first row is highlighted with a blue background and shows 'Custom Object' in the 'LABEL' column.

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

The screenshot shows the 'New Custom Object' setup page. At the top, it says 'New Custom Object | Salesforce'. The URL is 'sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new'. The page has a 'Custom Object Edit' header with 'Save', 'Save & New', and 'Cancel' buttons. The main form is titled 'Custom Object Information'. It contains fields for 'Label' (with example 'Account') and 'Plural Label' (with example 'Accounts'). Both fields are highlighted with red boxes and have red arrows pointing to them from the text above. Below these are fields for 'Object Name' (with example 'Account') and 'Description'. Under 'Context-sensitive Help setting', the radio button for 'Open the standard Salesforce.com Help & Training window' is selected. In the 'Optional Features' section, the 'Allow Reports' checkbox is checked and highlighted with a red circle and a red box, with a red arrow pointing to it from the text above. There are also 'Allow Activities' and 'Track Field History' checkboxes.



- Click on Save.

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.

Create Buyer and Fuel details Objects

Note: Follow the same steps as mentioned in Activity 2 for the Buyer and Receipt objects.

- Use these display format for the Buyer
 - label name ? Buyer
 - Plural label name ? Buyers
 - Display Format ? Buyer-{000}
 - Starting number ? 1
- Use these display format for the Fuel details
 - label name ? Fuel details

- Plural label name ? Fuel details
- Display Format ? fuel-{000}
- Starting number ? 1

Tabs

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

Types of Tabs:

1. Custom Tabs :

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

2. Web Tabs :

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

3. Visualforce Tabs :

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

4. Lightning Component Tabs :

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

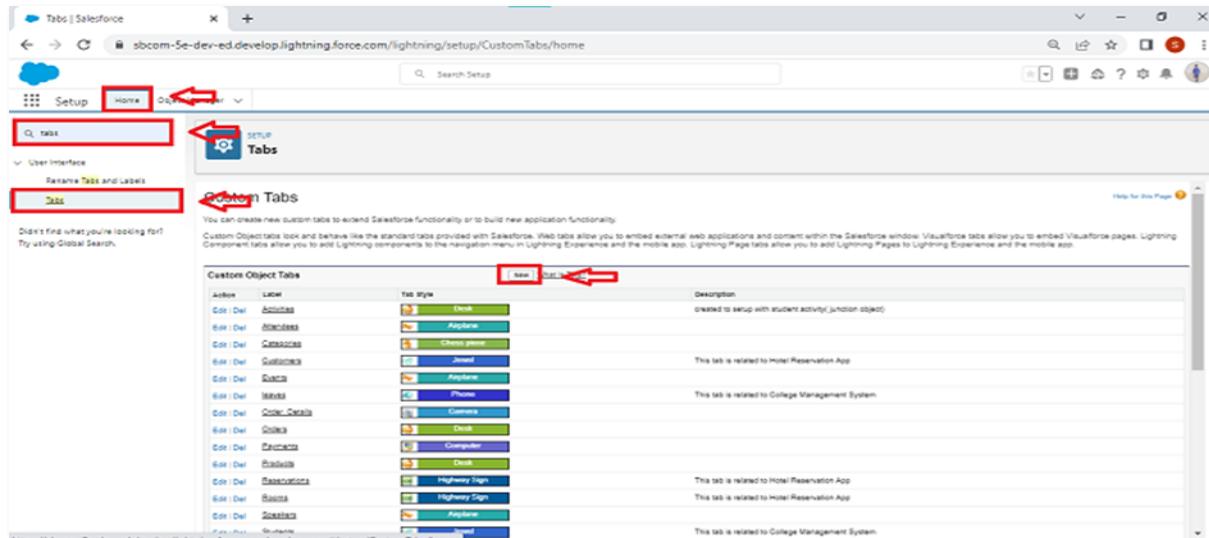
5. Lightning Page Tabs :

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

Creating a Custom Tab

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

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](#).

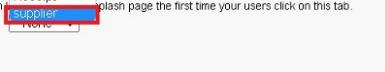
Object: **supplier**  

Tab Style: **None**  

(Optional) Choose a Home Page Custom Link splash page the first time your users click on this tab.

Splash Page Custom Link: **supplier**  

Enter a short description.

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

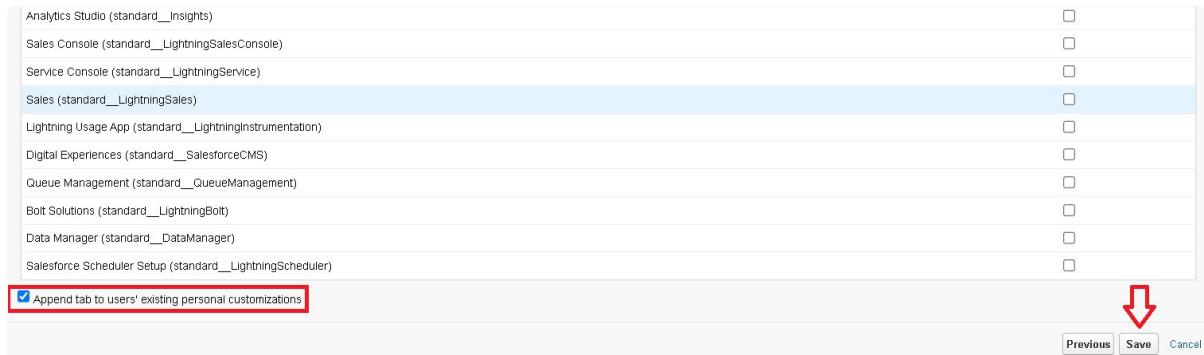
Save **Cancel**

Step 3. Add to Custom Apps

Step 3 of 3

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"/>	



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 Lightning App

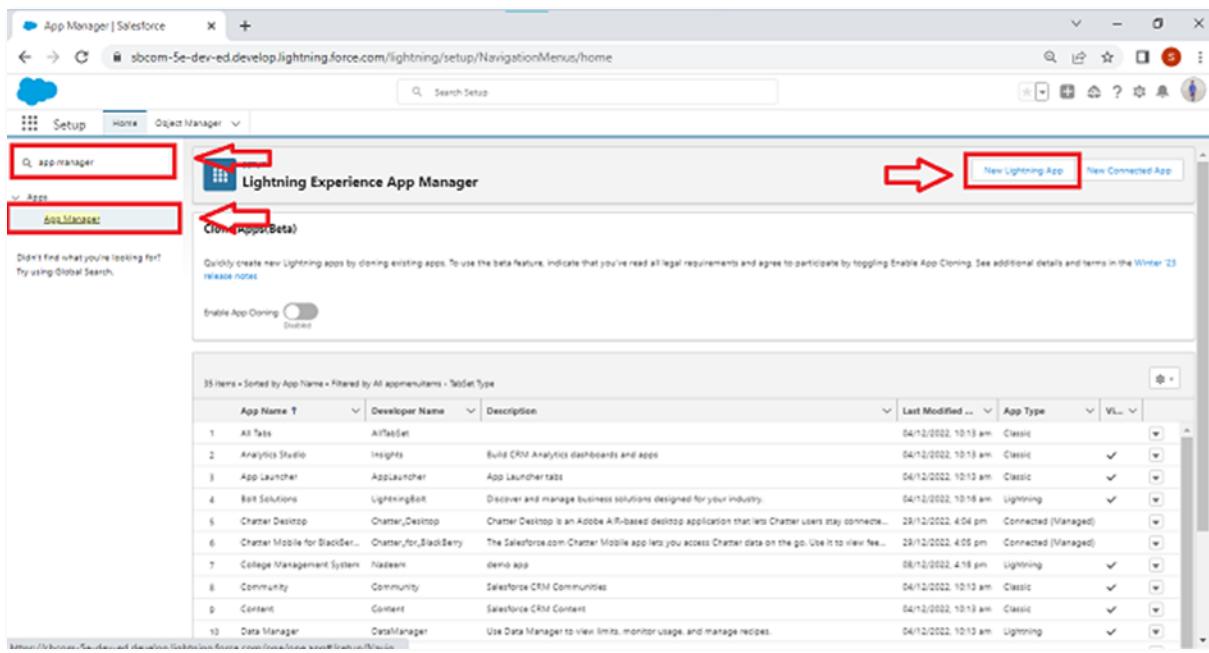
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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.

Create a Lightning App

To create a lightning app page:

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



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

New Lightning App

App Details & Branding

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

App Details

* App Name

* Developer Name

Description

App Branding

Image

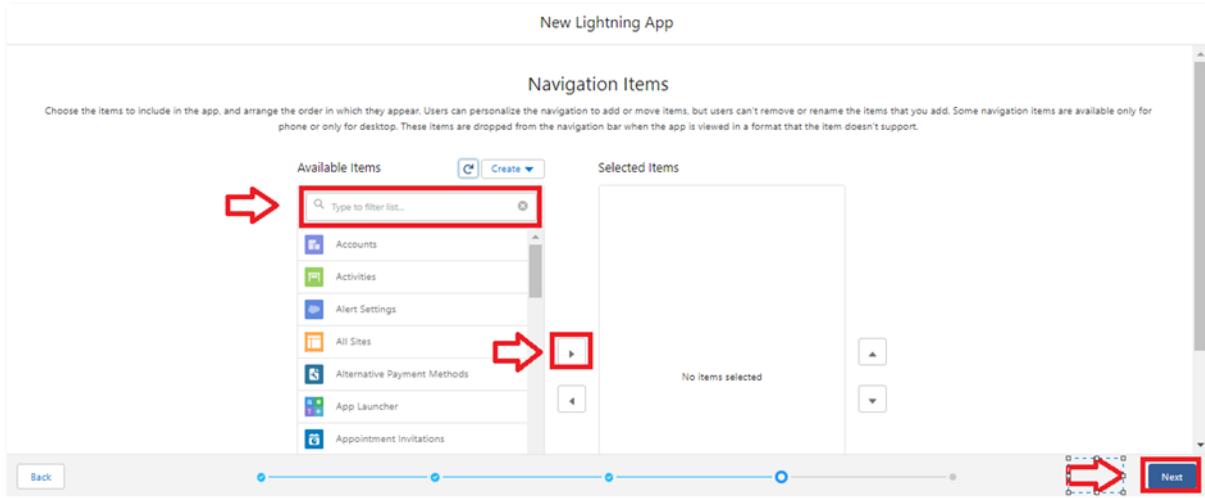
Primary Color Hex Value

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

App Launcher Preview

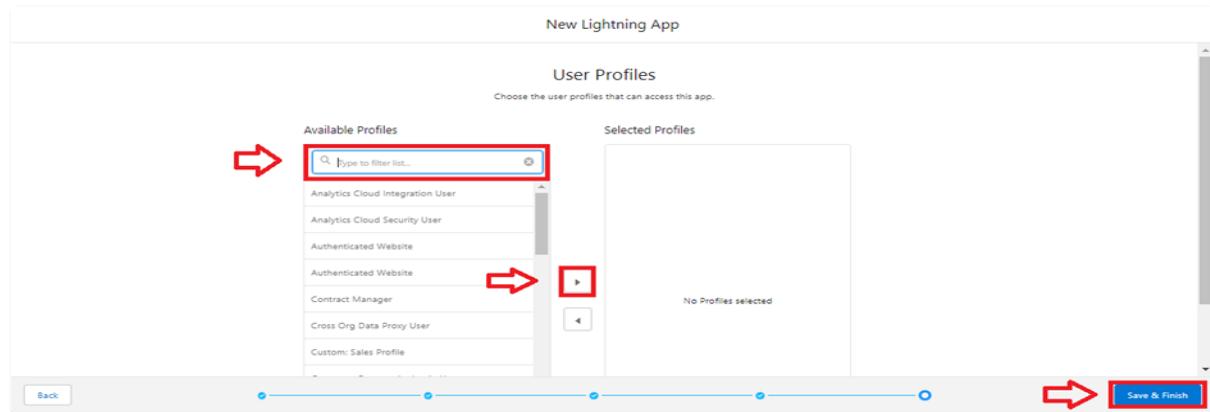
Next

3. To Add Navigation Items:



Select the items (Supplier, Gas Station, Buyer, Receipt) from the search bar and move it using the arrow button ? Next.

4. To Add User Profiles:



Search profiles (System administrator) in the search bar ? click on the arrow button ? save & finish.

Creating Junction Object

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

Creating junction object as Fuel details with Supplier & Gas station

To create junction object

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

The screenshot shows the Salesforce Object Manager. A red box highlights the 'Object Manager' button in the top navigation bar. Another red box highlights the 'Fuel' entry in the list, which is selected. A third red box highlights the 'Create' button in the top right corner.

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

The screenshot shows the 'Supplier' object's Fields & Relationships page. A red box highlights the 'Fields & Relationships' link in the sidebar. Another red box highlights the 'New' button at the top right of the main table area.

3. Select “Master-Detail relationship” as data type and click Next.

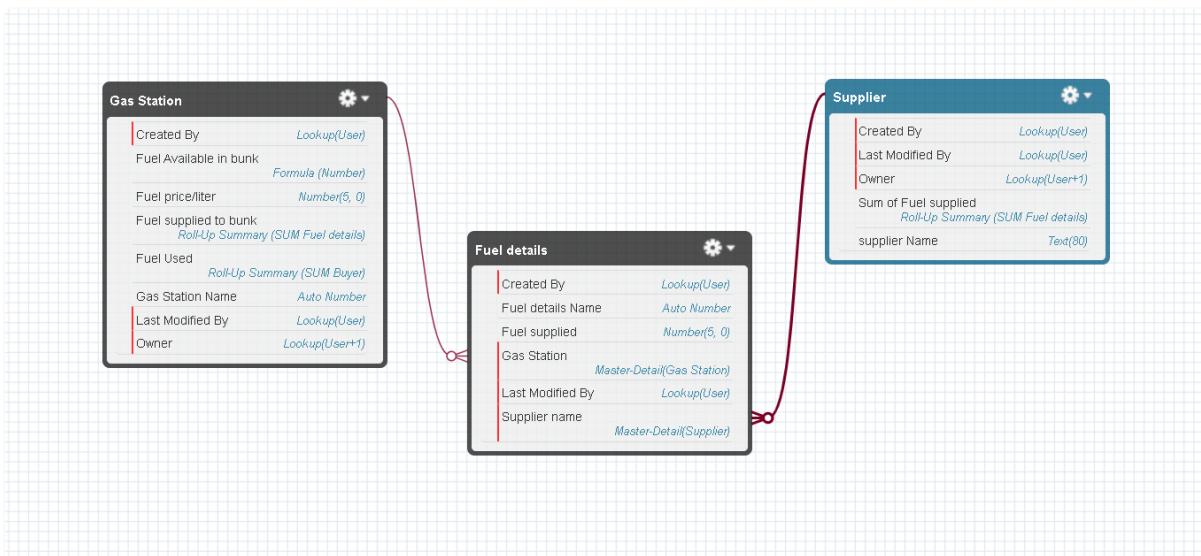
The screenshot shows the 'Data Type' configuration page. A red box highlights the 'Master-Detail Relationship' option under the 'Lookup Relationship' section. A green arrow points to the 'Next' button in the top right corner.

4. Select the related object “ Supplier ” and click next.



5. Give Field Label as "Supplier Name" and click Next.
6. Next ? Next ? Save & New.

7. Follow the same steps from 1 to 3.
8. Select the related object "Gas station" and click Next.
9. Give Field Label as "Gas Station" and click Next.
10. Next ? Next ? Save.
11. Below their is an overview of junction object for better understanding.



Creating a Master-Detail Relationship

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

Creating Master-Detail Relationship between Buyer & Gas Station Object

To Create a Master-Detail relationship

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

Buyer object.

2. Click on fields & relationship ? click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. Select the related object “ Gas station ”.
5. Give Field Label as “Gas Station name” and click Next.
6. Next ? Next ? Save.

Creating the number field in Fuel details object

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

Previous Next Cancel

Field Label [i]

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 [i]

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 [i]

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

Creating the Roll-up Summary

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

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

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

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

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

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.

Step 3. Define the summary calculation

Step 3 of 5

Select Object to Summarize

Master Object: Supplier
Summarized Object: **Fuel details**

Select Roll-Up Type

COUNT
 SUM (Required Information)
 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.

Note : create the field as “ Fuel filled in vehicle ” using number datatype in Buyer object.

13. Follow the same steps for the Gas station Object from 1 to 3
14. Give the Field label as “ Fuel used ”,Field Name will be Auto generated, and click Next.
15. Select the summarized object as “ Buyer ”.
16. Select the Rollup type as “sum”.
17. Select the field to aggregate as “ Fuel filled in vehicle ”, and click Next ? Next ? Save.

Creating Formula Field in Gas Station Object

A **formula field** is a custom field that can be used to calculate or display data on a Salesforce record.

Formula fields can be used to perform a variety of tasks, such as:

- Calculating totals or averages
- Creating custom fields that display data from other fields
- Validating data entry
- Automating processes

1. Go to setup ? click on Object Manager ? type object name(Gas station) in search bar ? click on the object.
2. Click on fields & relationship ? click on New.
3. Select Data type as “Formula” and click Next.
4. Give Field Label and Field Name as “Fuel Available in bunk” and select formula return type as “Number” and click next.

Step 2. Choose output type

Step 2 of 5

Field Label	Field Name	Previous	Next	Cancel
<input checked="" type="checkbox"/> Auto add to custom report type <input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity				
Formula Return Type				
<input checked="" type="radio"/> None Selected Select one of the data types below.				
<input type="radio"/> Checkbox	Calculate a boolean value. Example: [TODAY()] > CloseDate			
<input type="radio"/> Currency	Calculate a dollar or other currency amount and automatically format the field as a currency amount. Example: [Gross Margin] = Amount - Cost_c			
<input type="radio"/> Date	Calculate a date, for example, by adding or subtracting days to other dates. Example: [Reminder Date] = CloseDate - 7			
<input type="radio"/> Date/Time	Calculate a date/time, for example, by adding a number of hours or days to another date/time. Example: [CloseDate] = NOWDATE() + 1			
<input checked="" type="radio"/> Number	Calculate a numeric value. Example: [Fahrenheit] = 1.8 * Celsius_c + 32			
<input type="radio"/> 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...](#)

<input type="radio"/> Simple Formula	<input checked="" type="radio"/> Advanced Formula
<input type="button" value="Insert Field"/>	<input type="button" value="Insert Operator"/> ▾
<pre>FuelAvailable in bunk(Number) = Fuel_supplied_to_bunk_c - Fuel_Used_c</pre>	
Functions <input type="checkbox"/> All Function Categories ABS ACOS ADDMONTHS AND ASCII ASIN <input type="button" value="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.

Creating Cross Object Formula Field in Buyer Object

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

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

1. Go to setup ? click on Object Manager ? type object name(Buyer) in search bar ? click on the object.
2. Click on fields & relationship ? click on New.
3. Select Data type as “Formula” and click Next.
4. Give Field Label and Field Name as “Amount Paid ” and select formula return type as “Number” and click next.

Step 2. Choose output type

Step 2 of 5

Field Label Field Name 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: `[Meet = NOW() + 1]`

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

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

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 Decimal Places

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.
Example: `[Gross Margin = Amount - Cost__c]` [More Examples...](#)

Quick Tips
Getting Started
Operators & Functions

Simple Formula Advanced Formula

Insert Field

Amount Paid (Currency) =

Functions

-- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

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 [i](#)

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 [i](#)

Restrict picklist to the values defined in the value set [i](#)

Field Name [i](#)

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.

Creating the validation rule

Creating the validation rule for phone number 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.

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

Validation Rules

Rule Name	Error Location	Error Message	Active	Modified By
phone	Phone Number	incorrect data	✓	sunny 1, 12/06/2023, 12:00 pm

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

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

Validation Rule Edit

Save | Save & New | Cancel

Rule Name: phone

Active:

Description:

Error Condition Formula

Example: Discount_Percent_c>0.30 | More Examples...
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area

Insert Field | Insert Operator | NOT (REGEX(Phone_Number__c , "[6-9]{1}[0-9]{9}"))

Functions

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

Insert Selected Function

ABS(number)
Returns the absolute value of a number, a number without its sign

Check Syntax | No errors found

5. Enter the Error Message as “incorrect data”, select the Error location as Field and select the field as “phone number”, and click Save.

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message: incorrect data

This error message can either appear at the top of the page or below a specific field on the page

Error Location | Top of Page Field | Phone Number |

Save | Save & New | Cancel

Creating Remaining Fields in Objects

s.no	Object name	Fields														
1	Fuel details	<table border="1"> <tr><td>Fuel Name</td><td>Date</td></tr> <tr><td>Fuel Type</td><td>Color</td></tr> <tr><td>Capacity</td><td>Model</td></tr> <tr><td>Concentration</td><td>Model</td></tr> </table>	Fuel Name	Date	Fuel Type	Color	Capacity	Model	Concentration	Model						
Fuel Name	Date															
Fuel Type	Color															
Capacity	Model															
Concentration	Model															
2	Cars															
3	Cars															
4	Buyer	<table border="1"> <tr><td>First Name</td><td>Title</td></tr> <tr><td>Last Name</td><td>Title</td></tr> <tr><td>Customer Name</td><td>Gender</td></tr> <tr><td>DL Number</td><td>Phone</td></tr> <tr><td>Email</td><td>Email</td></tr> <tr><td>Fuel Card Number</td><td>Name</td></tr> <tr><td>Vehicle Name</td><td>Additional</td></tr> </table>	First Name	Title	Last Name	Title	Customer Name	Gender	DL Number	Phone	Email	Email	Fuel Card Number	Name	Vehicle Name	Additional
First Name	Title															
Last Name	Title															
Customer Name	Gender															
DL Number	Phone															
Email	Email															
Fuel Card Number	Name															
Vehicle Name	Additional															

Page layouts

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

creating the page layout

To Create a Page layout:

1. Go to Setup ? Click on Object Manager ? Search for the object (Buyer) ? From drop down select the object and click on it.
2. Click on Page layout ? Click on New.

- 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 "Persoanal 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

8. One section is “ vehicle info ” , drag the fields that are
 - Fuel filled in vehicle, vehicle type.
9. Another section is “Recepit details ”, and drag the fields that are
 - Mode of payment , Amount paid.
10. Then , Click save.

The screenshot shows the Salesforce Layout Properties interface. At the top, there are buttons for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. On the left, a sidebar lists Fields, Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. The main area displays a record with sections: Personal Details, Vehicle Info, and Receipt details. The Vehicle Info section is highlighted with a red box. The Personal Details section contains fields like First Name, Last Name, Customer name, Phone Number, Email, and Gas Station name. The Vehicle Info section contains Fuel filled in vehicle and Vehicle type. The Receipt details section contains Mode of payment and Amount Paid. At the bottom, there is an Information header and a footer with CEN-2004-001234.

Profiles

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

We cannot deleted standard ones

Each of these standard ones includes a default set of permissions for all of the

standard objects available on the platform.

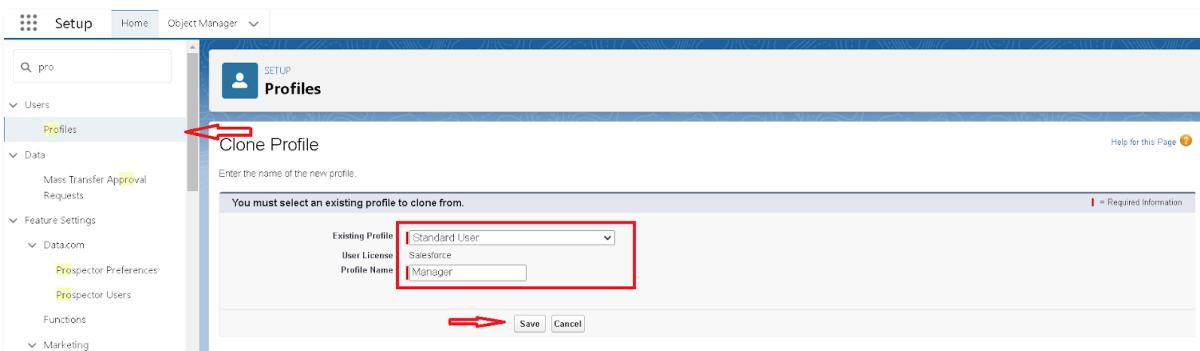
2. Custom Profiles:

Custom ones defined by us.

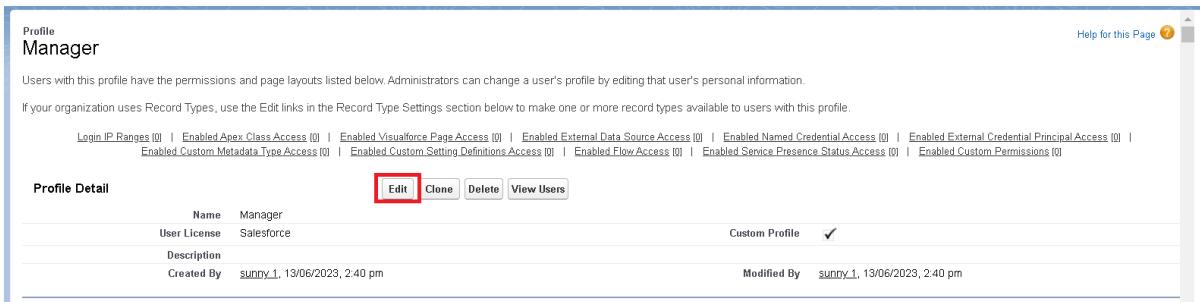
They can be deleted if there are no users assigned with that particular one.

To create a new profile:

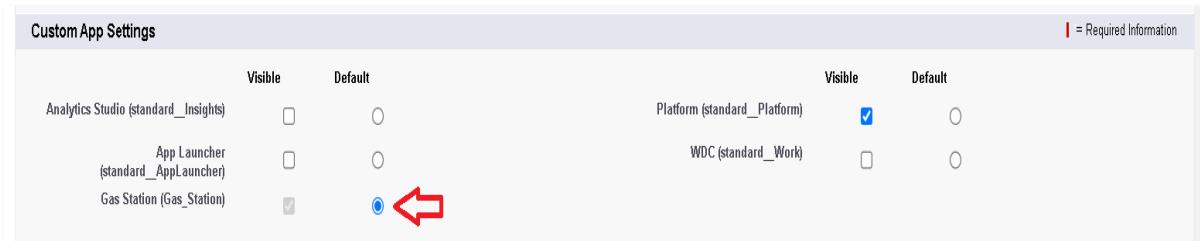
1. Go to setup ? type profiles in quick find box ? click on profiles ? clone the desired profile (Standard User) ? enter profile name (Manager) ? Save.



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.

Custom Object Permissions

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

Session Settings

Session Times Out After: 8 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

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

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

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.

Custom Object Permissions

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

5. And click save.

sales person Profile

1. Go to setup ? type profiles in quick find box ? click on profiles ? clone the desired profile (Salesforce Platform User) ? enter profile name (sales person) ? Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the Gas station.
4. Scroll down to Custom Object Permissions and Give access permissions for Buyers, Fuel details , gas station and suppliers objects as mentioned in the below diagram.

Custom Object Permissions														
	Basic Access			Data Administration				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"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" 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"/>		<input checked="" 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"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Suppliers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>					

5. And click save.

Role & Role Hierarchy

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Creating Manager Role

Creating Manager Role:

1. Go to quick find ? Search for Roles ? click on set up roles.

The screenshot shows the Salesforce Setup interface under the 'Object Manager' tab. The 'Roles' link is highlighted with a red box. The main content area displays a 'Sample Role Hierarchy' diagram with three levels: Executive Staff (CEO, President, CFO, VP Sales), Western Sales Director, and International Sales Director. Below each director are specific sales representatives. A tooltip provides a detailed explanation of the hierarchy levels. At the bottom right, there is a 'Set Up Roles' button and a checkbox for 'Don't show this page again'.

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

The screenshot shows the 'Your Organization's Role Hierarchy' page. The 'Expand All' link is highlighted with a red box. The hierarchy tree shows 'Nick Enterprises' with branches for 'CEO', 'Manager', 'HR', and 'On Site Emp'. Under 'Manager', 'Remote Emp' is listed. Each node has 'Edit | Del | Assign' options. A 'Collapse All' link is also present at the top left.

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

Role Edit

Label	Manger
Role Name	Manger
This role reports to	CEO
Role Name as displayed on reports	

Buttons: Save | Save & New | Cancel

Creating another roles

Creating another two roles under manager

1. Go to quick find ? Search for Roles ? click on set up roles.
2. Click plus on CEO role, and click add role under manager.

Collapse All Expand All

- Thesmartbridge
 - + Add Role
 - + CEO [Edit](#) | [Del](#) | [Assign](#)
 - + Add Role
 - + CFO [Edit](#) | [Del](#) | [Assign](#)
 - + Add Role
 - + COO [Edit](#) | [Del](#) | [Assign](#)
 - + Add Role
 - + Manger [Edit](#) | [Del](#) | [Assign](#)
 - + Add Role
 - + SVP, Customer Service & Support [Edit](#) | [Del](#) | [Assign](#)
 - + Add Role
 - + SVP, Human Resources [Edit](#) | [Del](#) | [Assign](#)
 - + Add Role
 - + SVP, Sales & Marketing [Edit](#) | [Del](#) | [Assign](#)
 - + Add Role

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

Role Edit
New Role

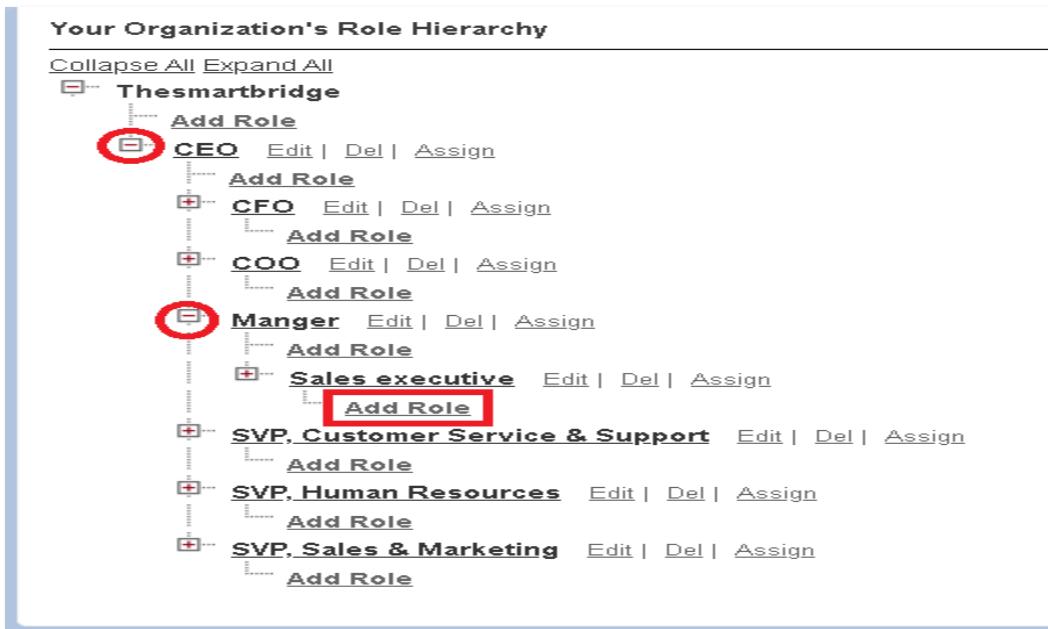
Help for this Page ?

Role Edit

Label	Sales executive	(Red arrow pointing to the Label field)
Role Name	Sales_executive	(Red arrow pointing to the Role Name field)
This role reports to	Manger	(Red arrow pointing to the This role reports to dropdown)
Role Name as displayed on reports		

Save **Save & New** **Cancel**

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



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

Role Edit
New Role

Help for this Page ?

Role Edit

Label	Sales person	(Red box around the Label field)
Role Name	Sales_person	(Red box around the Role Name field)
This role reports to	Sales executive	(Red box around the This role reports to dropdown)
Role Name as displayed on reports		

Save **Save & New** **Cancel**

Users

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

Create User

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

New User

User Edit

Save Save & New Cancel

General Information

First Name: Niklaus
Last Name: Mikaelson
Alias: nmika
Email: (redacted)
Username: Mikaelson@Niklaus
Nickname: nik

Role: Manager
User License: Salesforce
Profile: Manager
Active: ✓

Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type: --None--

3. Save.

creating another users

1. Follow the same steps from above activity and create another user using
 1. Role : sales executive
 2. User licence : Salesforce Platform

3. Profile : sales executive

2. Repeat the steps and create another user using
 1. Role : sales person
 2. User licence : Salesforce Platform
 3. Profile : sales person

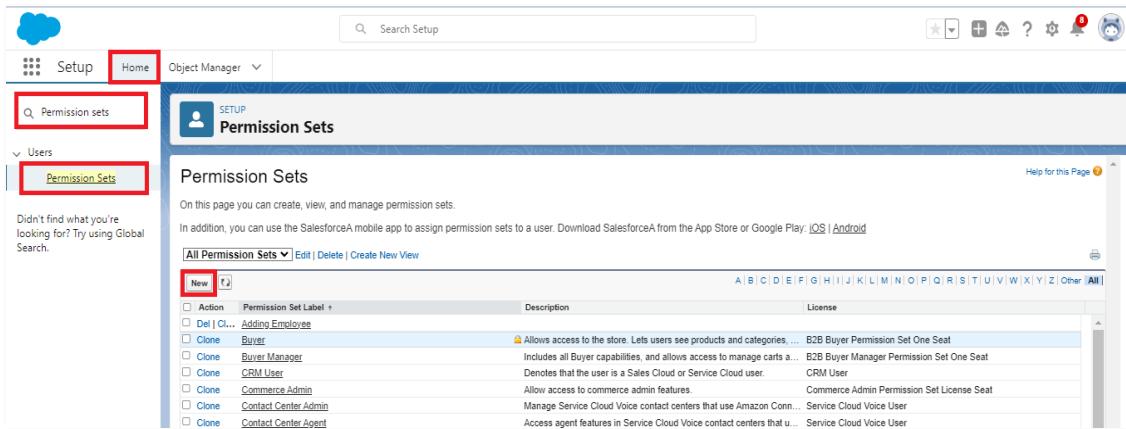
Permission sets

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

Creating permission set

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

1. Go to setup ? type "permission sets" in quick search ? select permission sets ? New.



The screenshot shows the Salesforce Setup interface. The top navigation bar has 'Setup' and 'Home' buttons, with 'Setup' highlighted. Below the navigation is a search bar labeled 'Search Setup'. The main content area is titled 'Permission Sets' under the 'Users' category. A sub-header says 'Permission Sets' with a 'Help for this Page' link. Below it is a table with columns: Action, Permission Set Label, Description, and License. The table lists several permission sets, including 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', and 'Contact Center Agent'. The 'Buyer' row is currently selected. At the bottom of the table, there are buttons for 'New', 'Edit', 'Delete', and 'Create New View'. The status bar at the bottom right shows 'A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All'.

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

Save Cancel

Enter permission set information

Label: P1

API Name: P1

Description: additional access for sales executive profile

Session Activation Required [i](#)

| = Required Information

3. 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

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

Permission Set
P1

Find Settings... | Clone | Delete | Edit Properties | **Manage Assignments**

Permission Set Overview > Object Settings ▾ Fuel details ▾

Fuel details | **Save** | Cancel

Tab Settings

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

Object Permissions

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

5. Click on Save.
6. After saving the permission click on the Manage assignment
7. Now click on the Add Assignment.

Current Assignments

Add Assignment

All Users ▾

1 item selected

Full Name	Alias	Username	Role	Active	Profile
<input checked="" type="checkbox"/> abd c	ac	ab@cd1.com	Sales executive	<input checked="" type="checkbox"/>	sales executive
<input type="checkbox"/> Astro Nomical	anomi	astronomicalsecurity.2vhahccacrda.juzh67mibr0rqsab1dhzd@smart.com	<input type="checkbox"/>	Force.com - Free User	<input type="checkbox"/>
<input type="checkbox"/> Brochan Pane	bpame	bpame.kh061622.nvopq5ltd9yi.cwkqyhudsxb@smart.com	<input type="checkbox"/>	Break Glass Administrator	<input type="checkbox"/>
<input type="checkbox"/> Chatter Expert	Chatter	chatty.00d5i00000dpzofead.nb26j1owcvnq@chatter.salesforce.com	<input checked="" type="checkbox"/>	Chatter Free User	<input type="checkbox"/>
<input type="checkbox"/> Cirrus Cash Flow	cirr	cirrus@cashflow.com	<input type="checkbox"/>	System Administrator	<input type="checkbox"/>

Cancel | Next

Select an Expiration Option For Assigned Users

No expiration date ?

Specify the expiration date

1 Day	1 Week	30 Days	60 Days	Custom Date
-------	--------	---------	---------	-------------

Time Zone
Select a time zone... ?

Selected Users

Full Name	Role	Profile	Active	User License	Expires On

Cancel Back **Assign**



- Now select the users which you have created in user milestone, using sales executive profile and click on Next ? Assign? Done.

Setup For OWD

Organization-Wide Defaults, or OWDs, are the pattern security rules that you can follow for your Salesforce instance. Organization Wide Defaults are utilized to confine who can access what information in your CRM. You can award access through different methods that we will discuss later (sharing principles, Role Hierarchy, Sales Teams, and Account groups, manual sharing, and so forth).

Primarily, there are four levels of access that can be set in Salesforce OWD and they are-

- ? Public Read/Write/Transfer (only available of Enquiry and Cases)
- ? Public Read/Write
- ? Public Read/Only
- ? Private

Create OWD Setting

- 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.

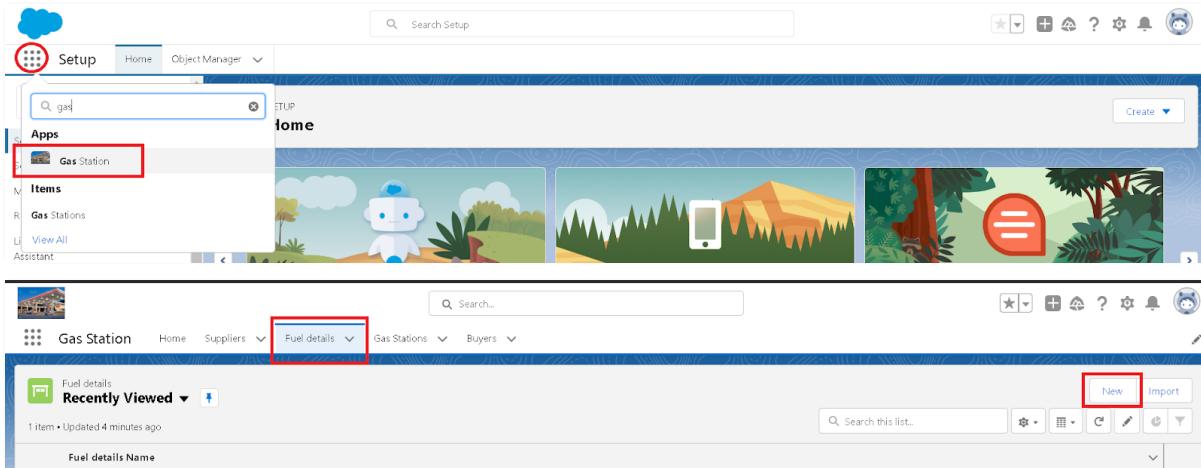
3. Click save.
4. Extra information, By these every profile has their own access, according to their profile.
5. But in our case we created a roles and given the roles in such a way that manager can see sales executive and sales person records , sales executive can see the sales person records.

User Adoption

create a record

To create a record in junction object follow these steps

1. Click on the app launcher locate at left side of the screen.
2. Search for “ Gas station” and click on it.
3. Click on “ fuel details tab”.
4. Click on new and fill the details as shown below figs, and click save.



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

The screenshot shows the 'New Fuel details' form. The title bar says 'New Fuel details'. A note at the top right indicates that '*' = Required Information. The form has a tabbed interface with 'Information' selected. Under 'Information', there's a field for 'Fuel details Name'. Below it, a section for 'Supplier name' contains a search bar 'Search Suppliers...' and a dropdown menu titled 'Recent Suppliers' which lists 'Indian Oil'. A red arrow points to a button labeled '+ New Supplier'. At the bottom of the form are buttons for 'Cancel', 'Save & New', and 'Save', with 'Save & New' being the active one. The URL in the browser is 'http://127.0.0.1:8069/web#model=fuel.details&view_type=form&id=1'.

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

New Supplier

Information

* supplier Name	Owner
HP	sunny 1

Action Buttons: Cancel, Save & New, **Save** (highlighted)

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

* Gas Station

Search Gas Stations...

Recent Gas Stations

Gas-001

+ New Gas Station **Save & New** **Save** (highlighted)

New Gas Station

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

New Gas Station

Information

Gas Station Name	Owner
	sunny 1

Fuel price/liter

116

Action Buttons: Cancel, Save & New, **Save** (highlighted)

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

The screenshot shows the 'Details' tab of a 'Fuel details' record. The fields and their values are:

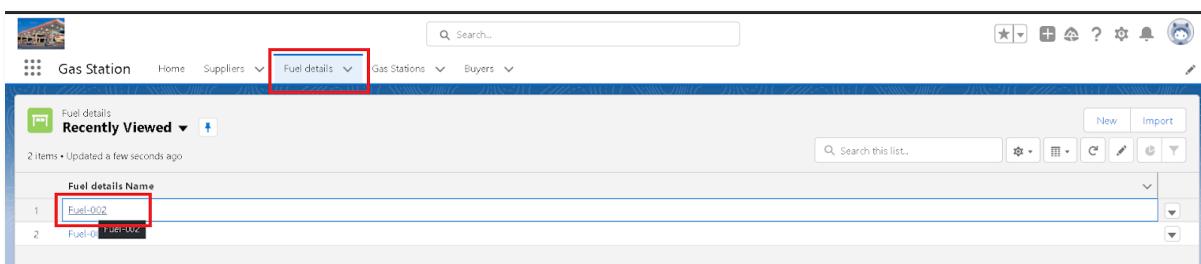
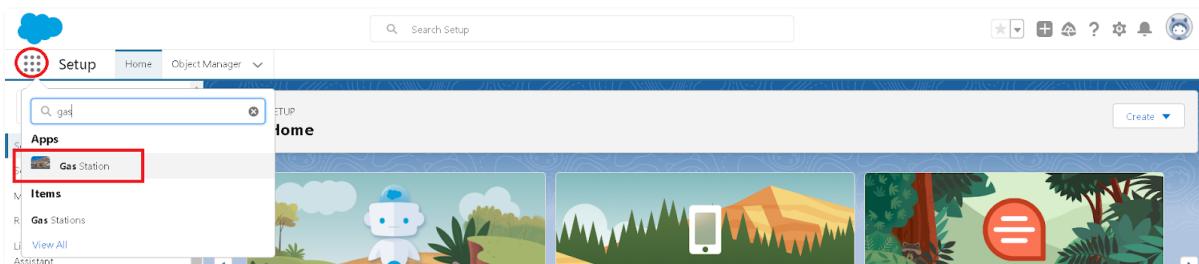
- Fuel details Name: Fuel-002
- Supplier name: HP
- Fuel supplied: 80,000
- Gas Station: Gas-002

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

View a record

To create a record in junction object follow these steps

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



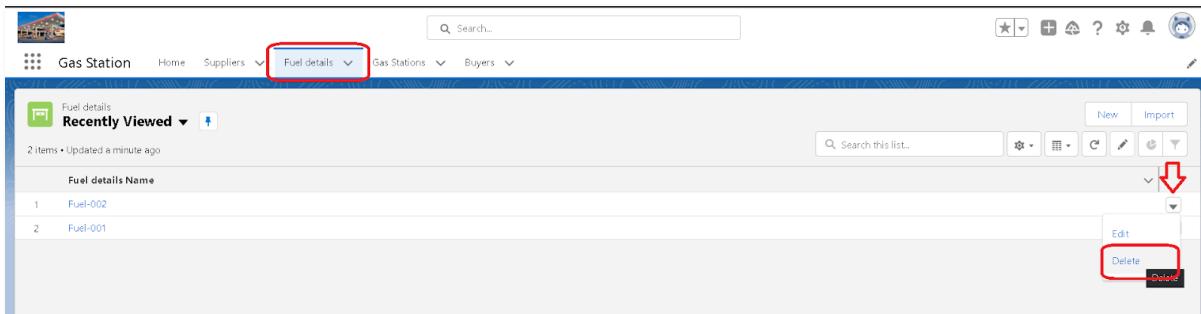
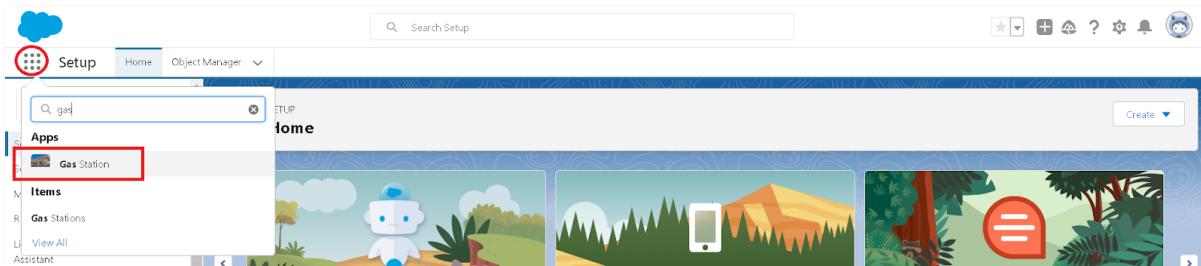
Related **Details**

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

Delete a record

To create a record in junction object follow these steps

1. Click on the app launcher locate at left side of the screen.
2. Search for “ Gas station” and click on it.
3. Click on “ fuel details tab”.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.



Reports

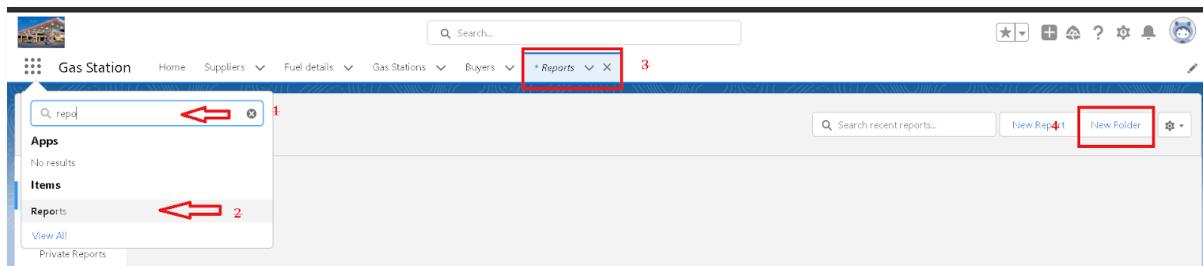
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

create a report folder

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



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

Create folder

* Folder Label
Fuel Estimation

* Folder Unique Name
FuelEstimation

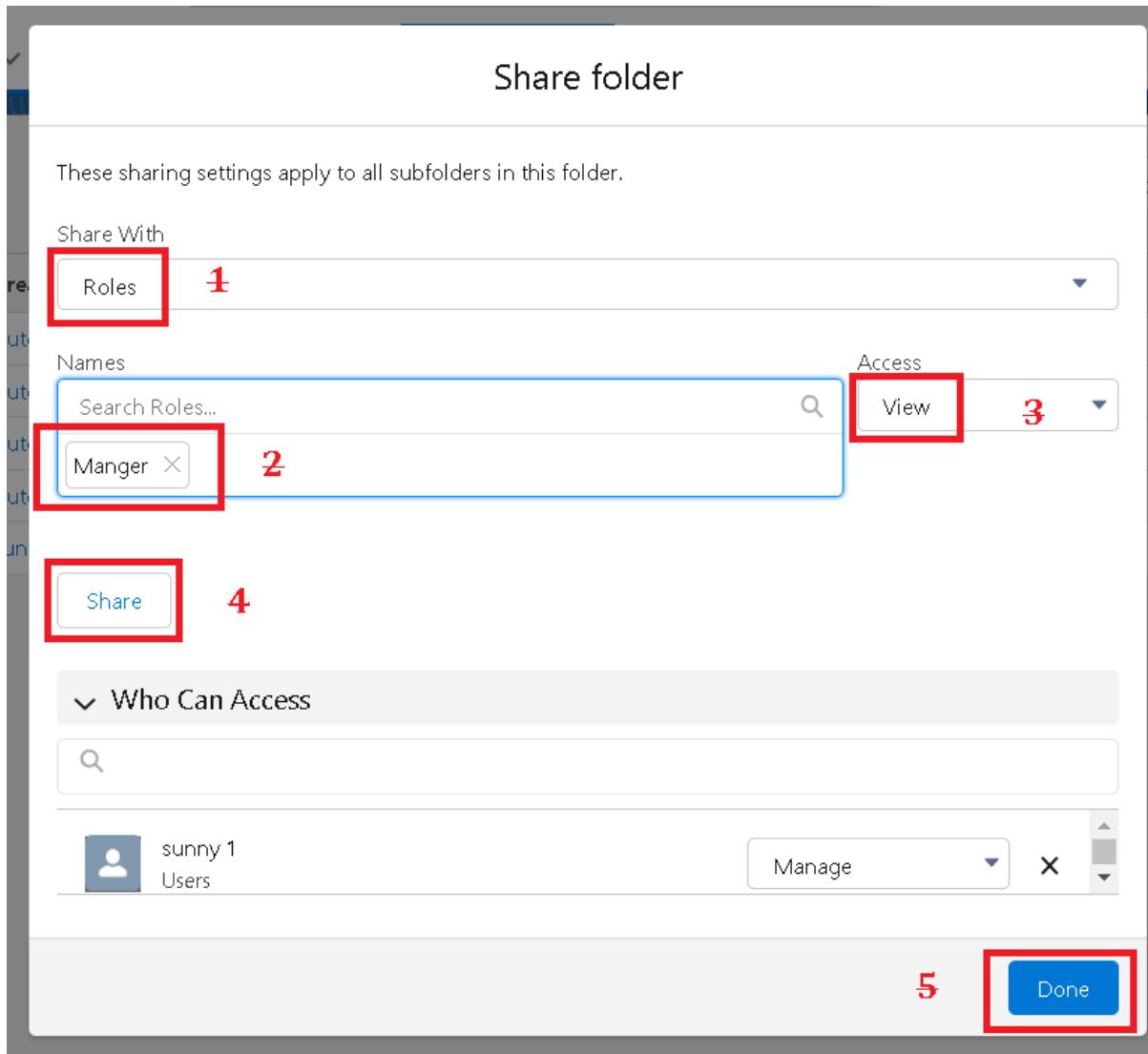
[Cancel](#) [Save](#)

Sharing a report folder

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

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

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



Create Report

Note : Before creating report, create latest "10" records in buyer object.
Try to fill every field in each record for better experience.

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

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

4. Their outline pane is opened already, select the fields that mentioned below in column section.
 1. Fuel filled in vehicle
 2. Amount paid
5. Remove the unnecessary fields.
6. Select the fields that mentioned below in GROUP ROWS section.
 1. Fuel Available in bunk
 2. Customer name

REPORT ▾

New Gas Stations with Buyers Report ➔ Gas Stations with Buyers

FIELDS > Outline Filters Previewing a limited number of records. Run the report to see everything.

Groups

GROUP ROWS

Add group...

Fuel Available in bunk 2

Customer name Fuel filled in vehicle Amount Paid

GROUP COLUMNS

Add group...

Columns

Add column... 4

Customer name # Fuel filled in vehicle # Amount Paid

Subtotal

Total (7)

2,718.00 (7) sunny bunny 70 ₹6,720.00
bunny g 15 ₹1,440.00
upadhye shivam 70 ₹6,720.00
sandeep gujja 7 ₹672.00
drug dealer 2,000 ₹1,92,000.00
sasuke uchiha 50 ₹4,800.00
naruto uzumaki 70 ₹6,720.00

Subtotal 2,282 ₹21,072.00

Total (7) 2,282 ₹21,072.00

Row Counts Detail Rows Subtotals Grand Total

Update Preview Automatically

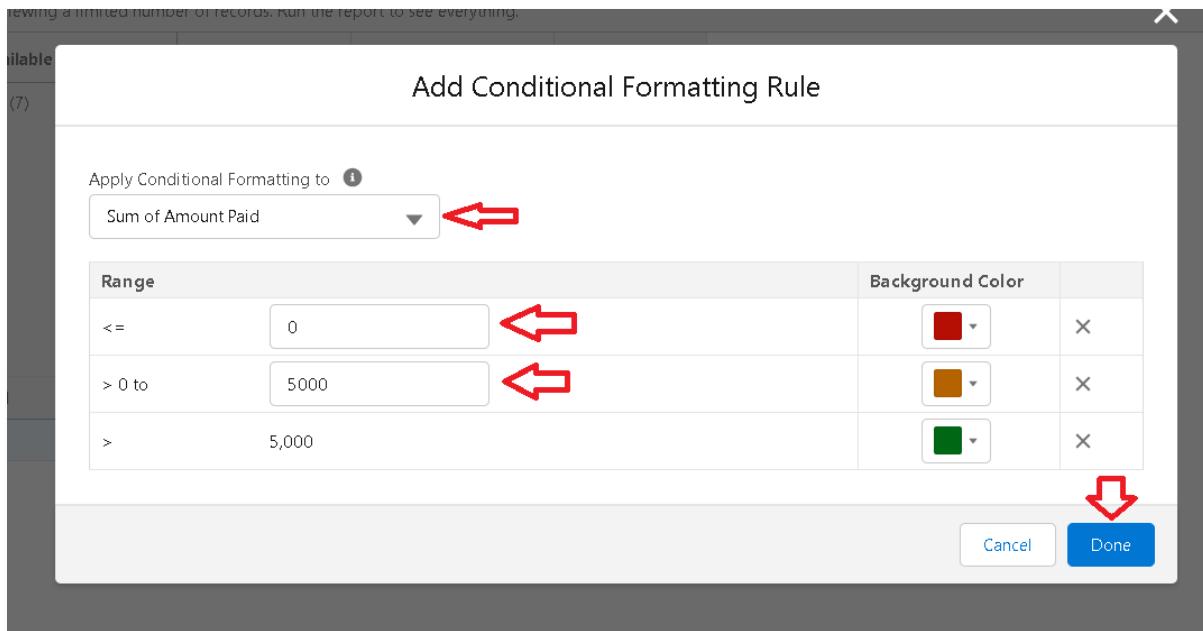
3

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

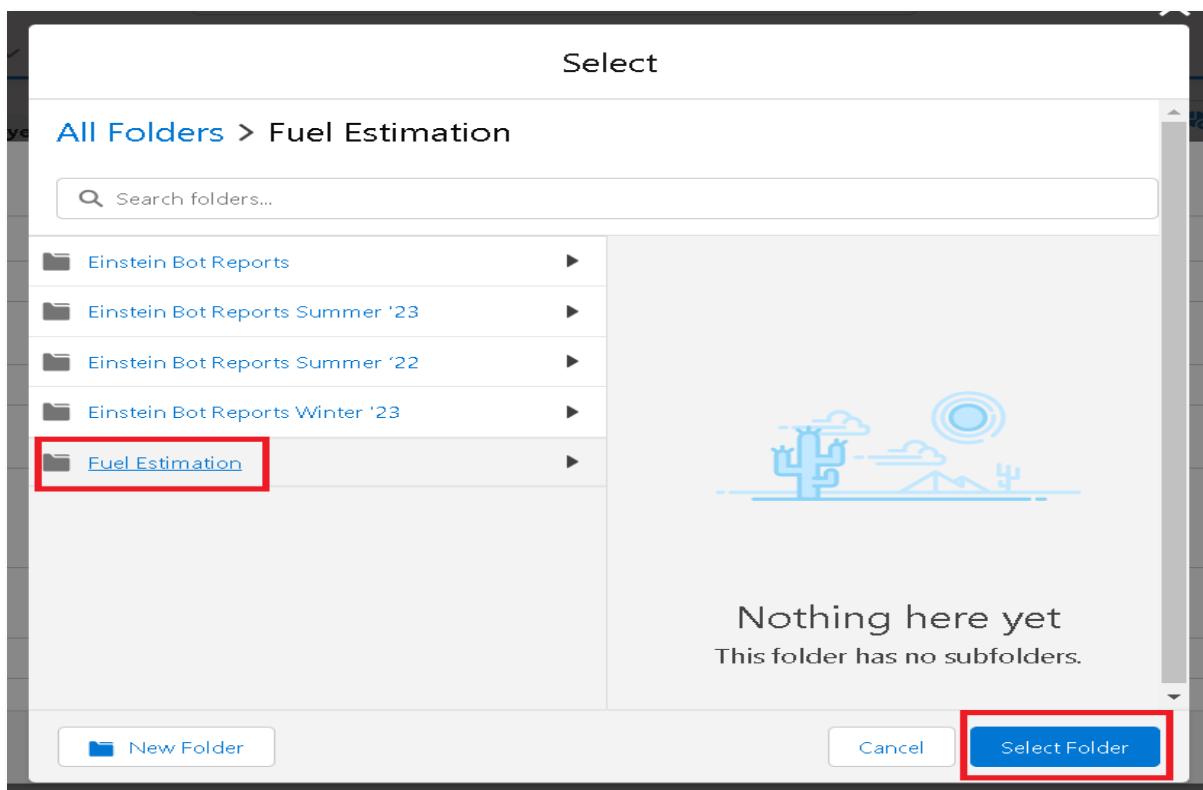
Conditional Formatting Rules

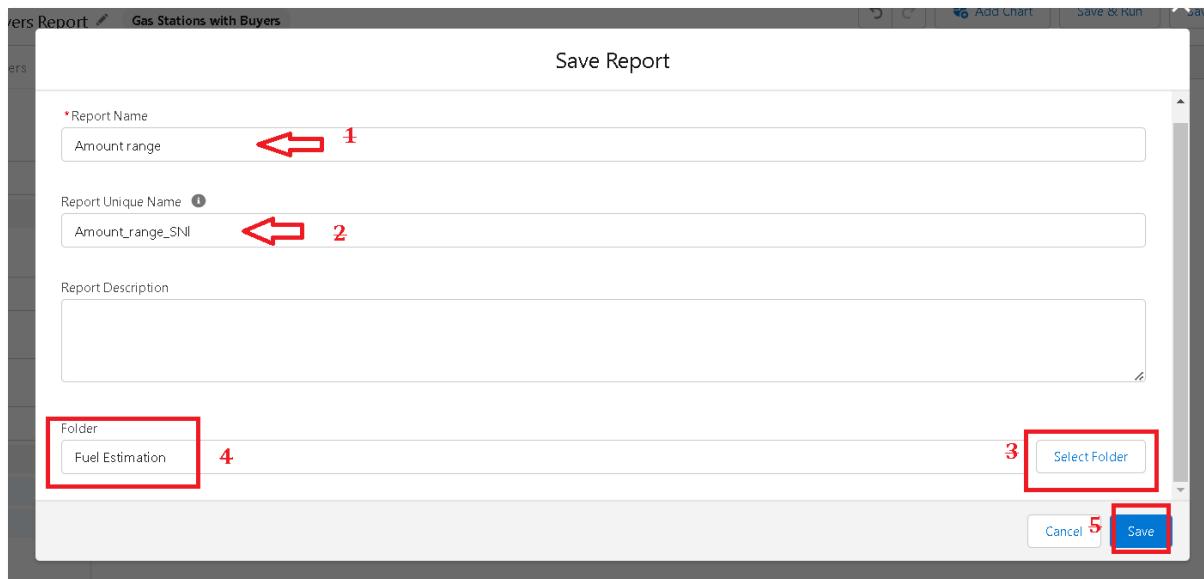
No Conditional Formatting Rules Created

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



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





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

Report: Gas Stations with Buyers

Amount range

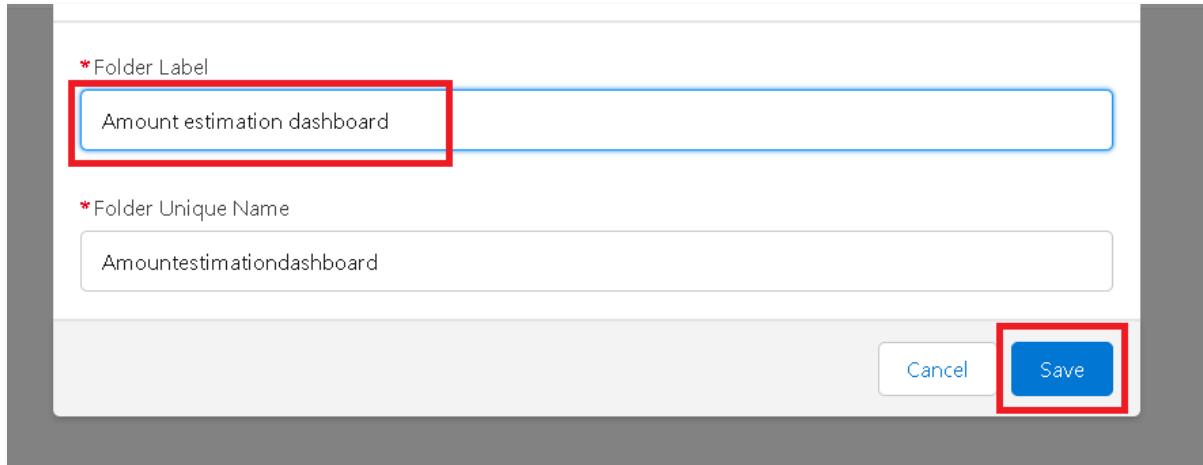
Total Records	Total Fuel filled in vehicle	Total Amount Paid	
7	2,282	₹2,19,072.00	
Customer name ↑ ↓	Fuel Available in bunk ↑ ↓	Fuel filled in vehicle ↓	Amount Paid ↑ ↓
bunny g (1)	2,718.00 (1)	15	₹1,440.00
	Subtotal	15	₹1,440.00
Subtotal		15	₹1,440.00
drug dealer (1)	2,718.00 (1)	2,000	₹1,92,000.00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

Dashboards

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

Create Dashboard Folder

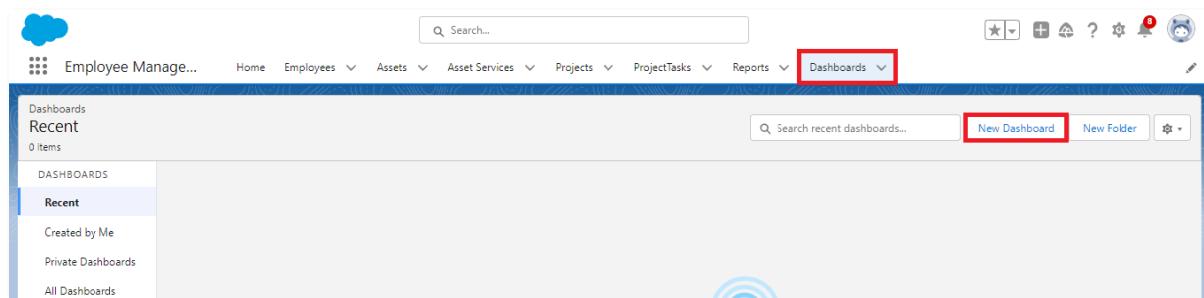
1. Click on the app launcher and search for dashboard.
2. Click on dashboard tab.
3. Click new folder, give the folder label as “Amount estimation dashboard”.
4. Folder unique name will be auto populated.
5. Click save.



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

Create Dashboard

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



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

New Dashboard

* Name
Estimation amount

Description

Folder
Amount estimation dashboard

Select Folder

Create

3. Select add component.

4. Select a Report and click on select.

Select Report

Reports

- Recent
- Created by Me
- Private Reports
- Public Reports
- All Reports

Folders

- Created by Me
- Shared with Me

Select Report

Amount range
sumy 1 - 15-Jun-2023, 12:29 pm - Fuel Estimation

Sample Flow Report: Screen Flows
Automated Process - 16-May-2023, 8:59 am - Public Reports

Cancel Select

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

6. Preview is shown below.

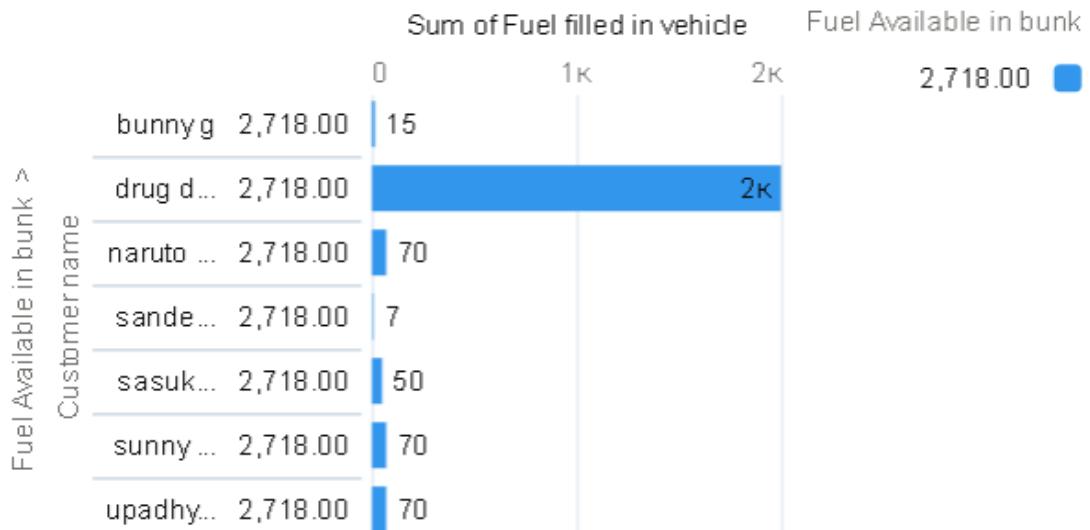


Dashboard

Estimation amount

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

Amount range



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

Flows

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

Create a Flow

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

Setup Home Object Manager

flows 1

Process Automation 2

Flows

Flow Trigger Explorer New Flow 3

Flows

All Flows

Flow Label ↑	Process Type	Ac...	Te...	Package State	Pa...	Last Modified By	Last Modified ...
Ac Amount update	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Veera Venkata Varaprasad Androthu	07/06/2023, 11:35 am
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Close Change Request & Related Issues	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			

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

New Flow

Core All + Templates

Screen Flow

Record-Triggered Flow 1

Schedule-Triggered Flow

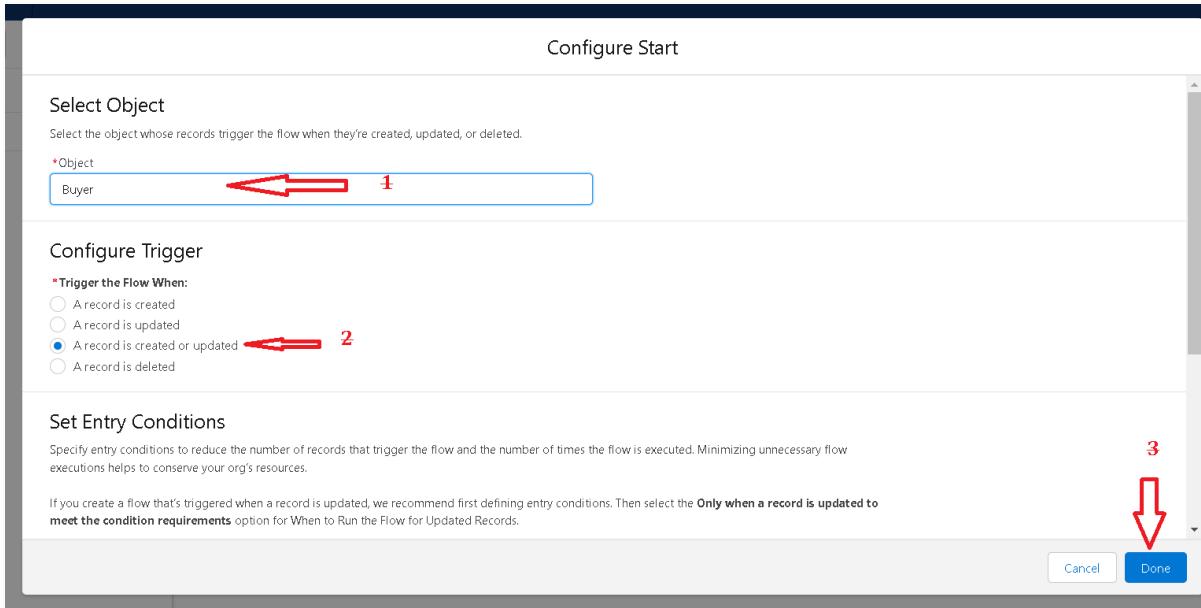
Platform Event—Triggered Flow

Autolaunched Flow (No Trigger)

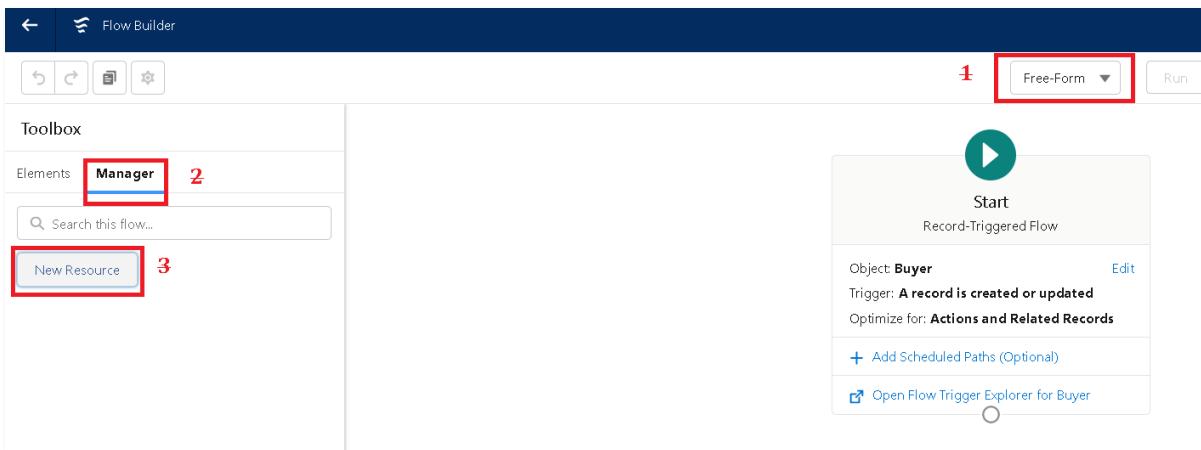
Record-Triggered Orchestration

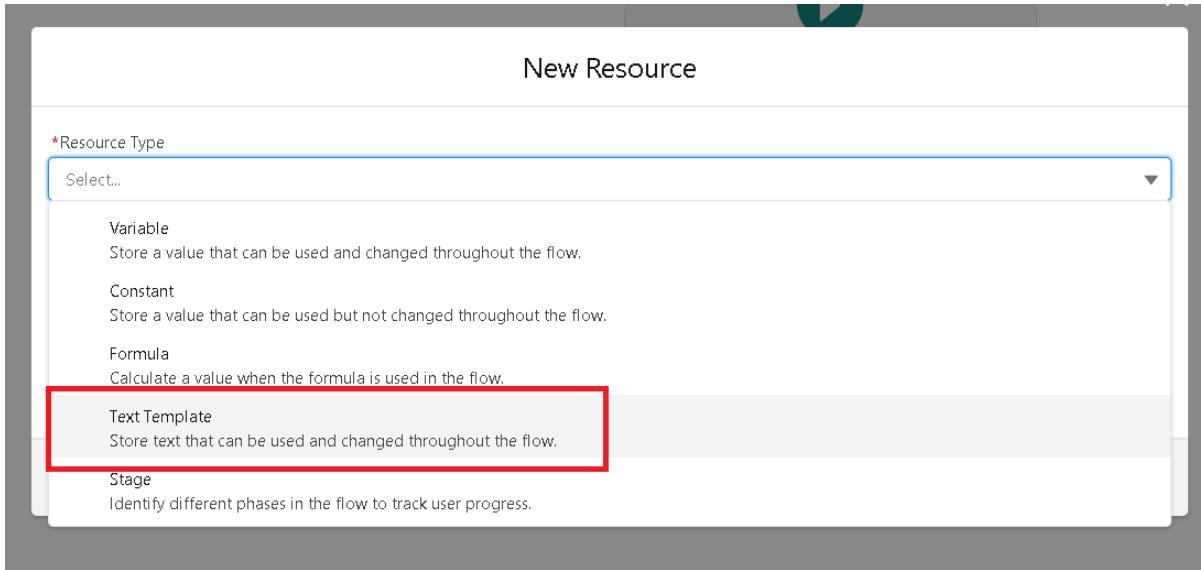
Create 2

- 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.



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





9. Enter the API name as “emailbody”.
10. In body field paste the syntax that given below.

Hello {!\$Record.Customer_name_c},

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

RECEPIT DETAILS :

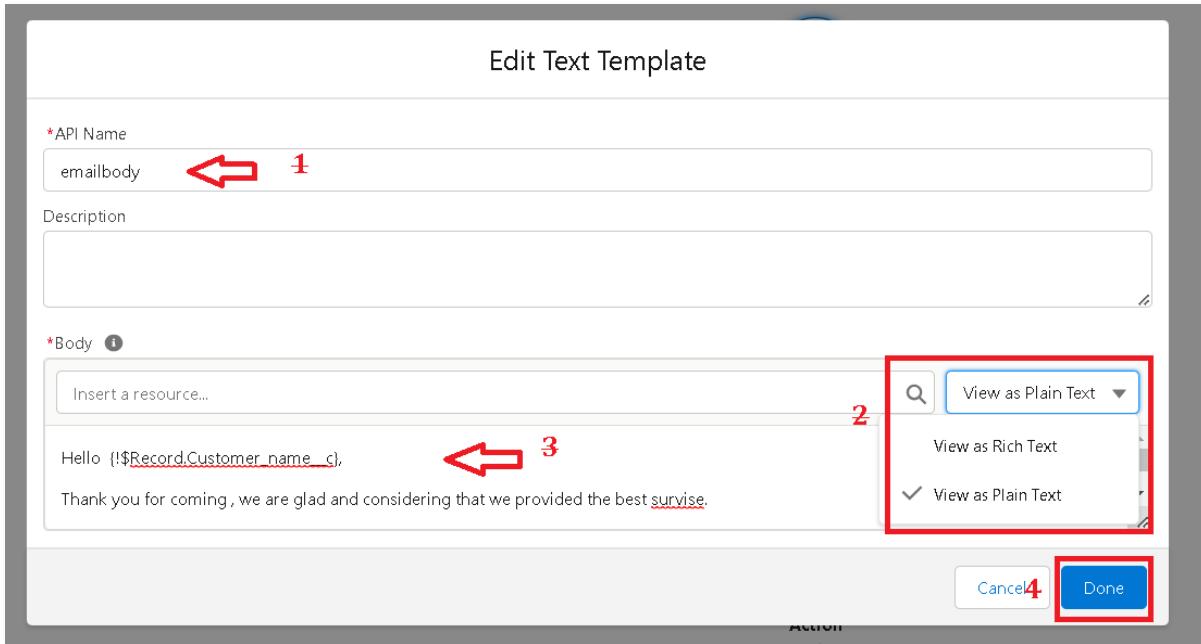
Customer name : {!\$Record.Customer_name_c}

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

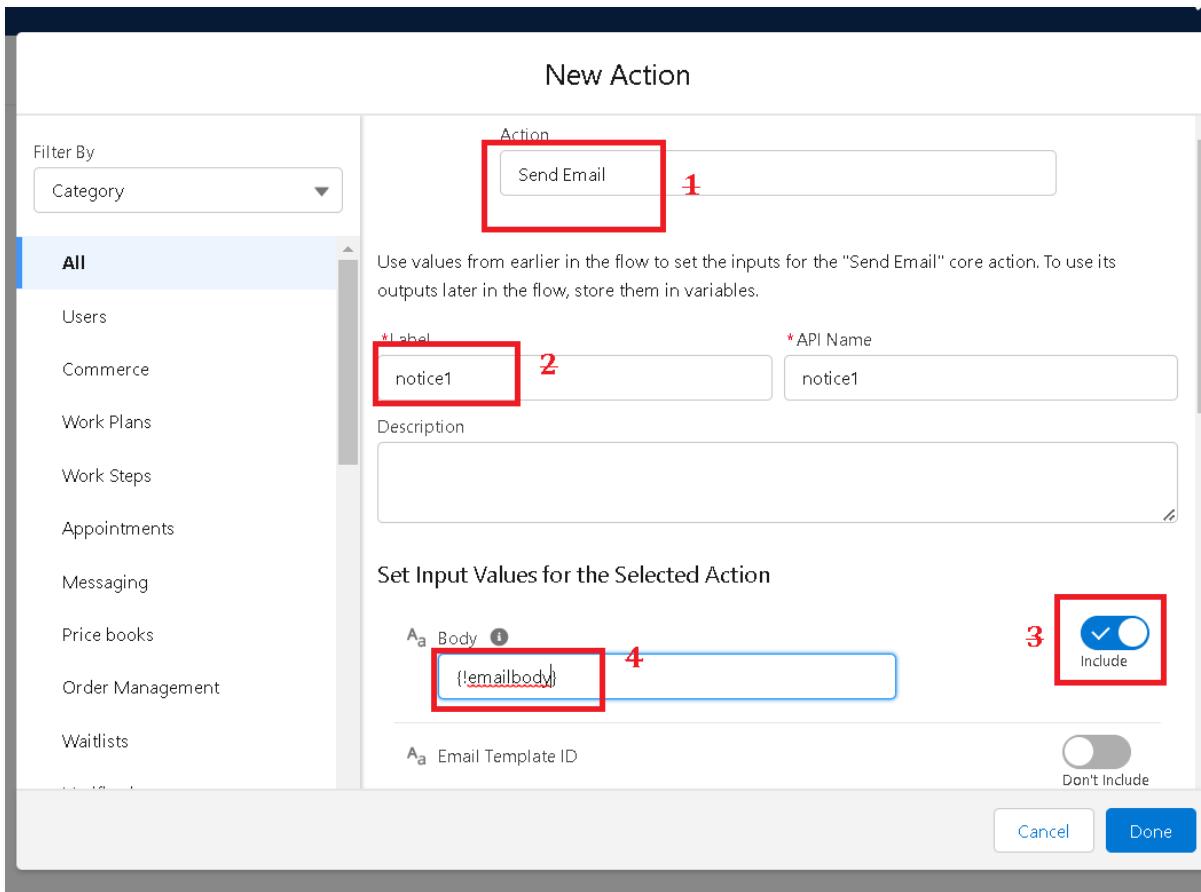
Vehicle type : {!\$Record.Vehicle_type_c}

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

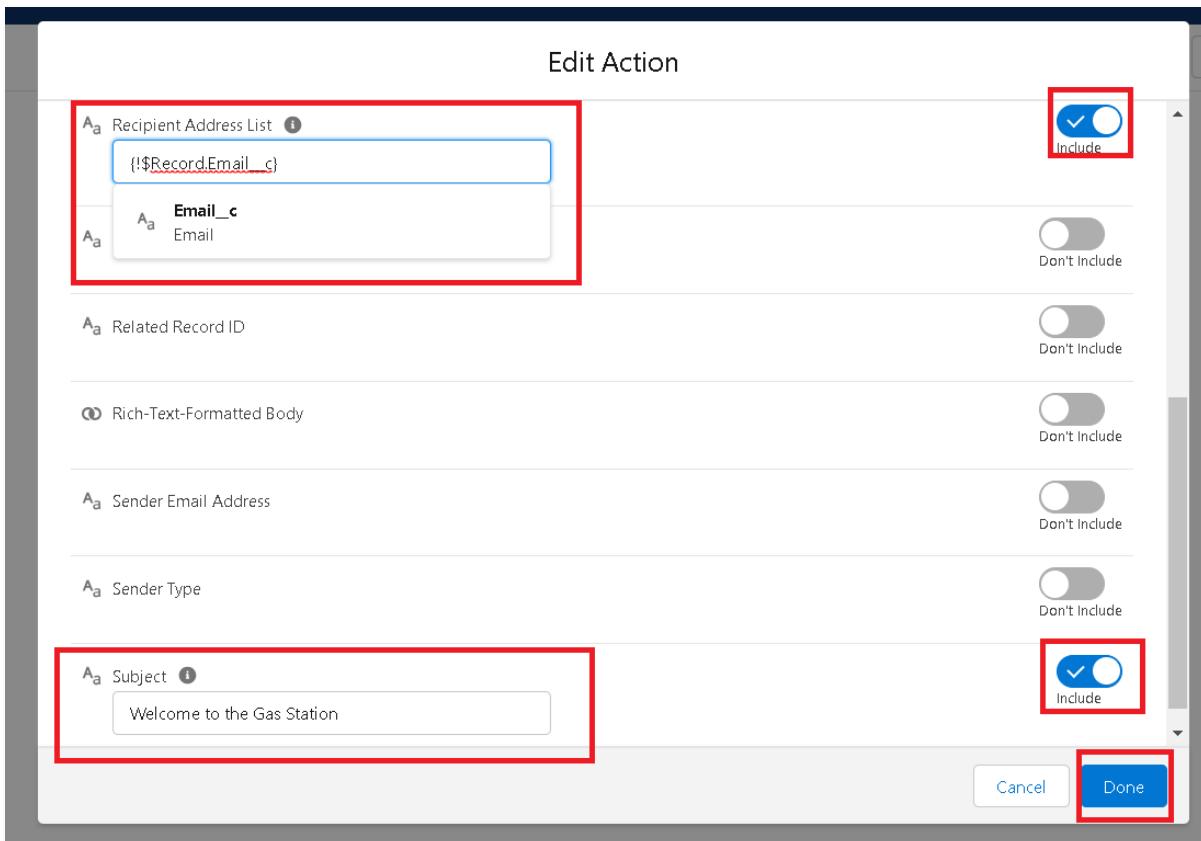
11. Change the view as Rich Text ? View to Plain Text.
12. Click done.



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



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



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

