

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

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, fuel sales, non-fuel sales, and more.

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

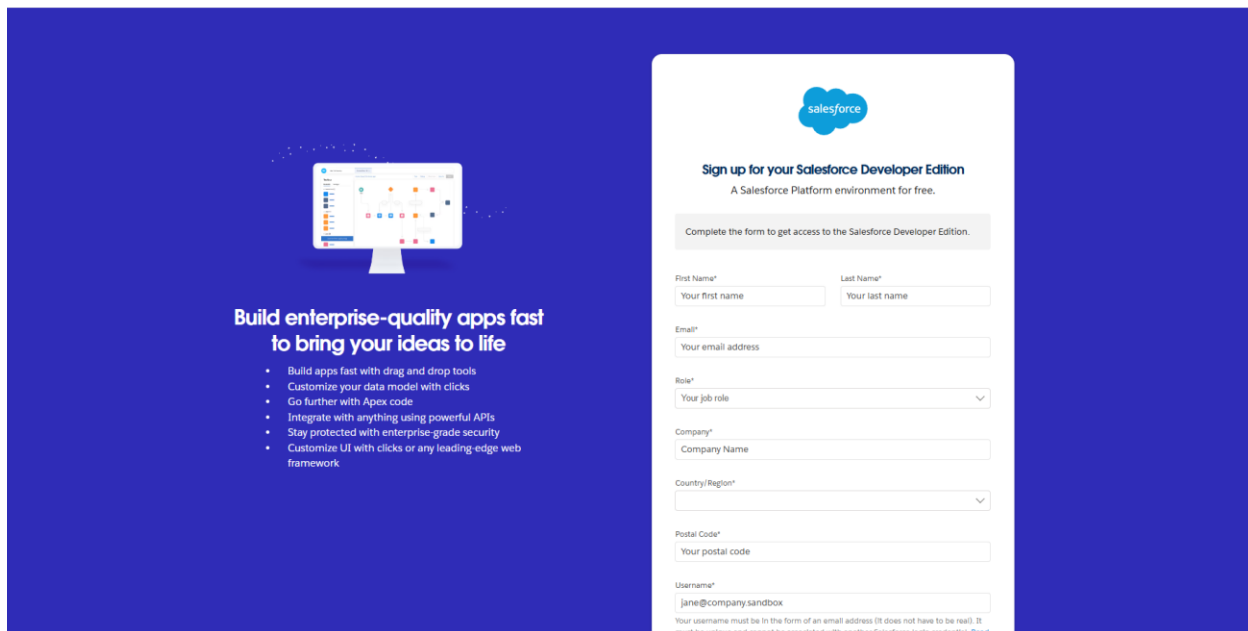
- **Customer Feedback:** Collect customer feedback through surveys and ratings to improve service quality.
- **Support Tickets:** Manage customer support tickets directly through the CRM for prompt resolution of issues.

Milestone 1 - Introduction to 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:



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 Salesforce Platform environment for free.

Complete the form to get access to the Salesforce Developer Edition.

First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

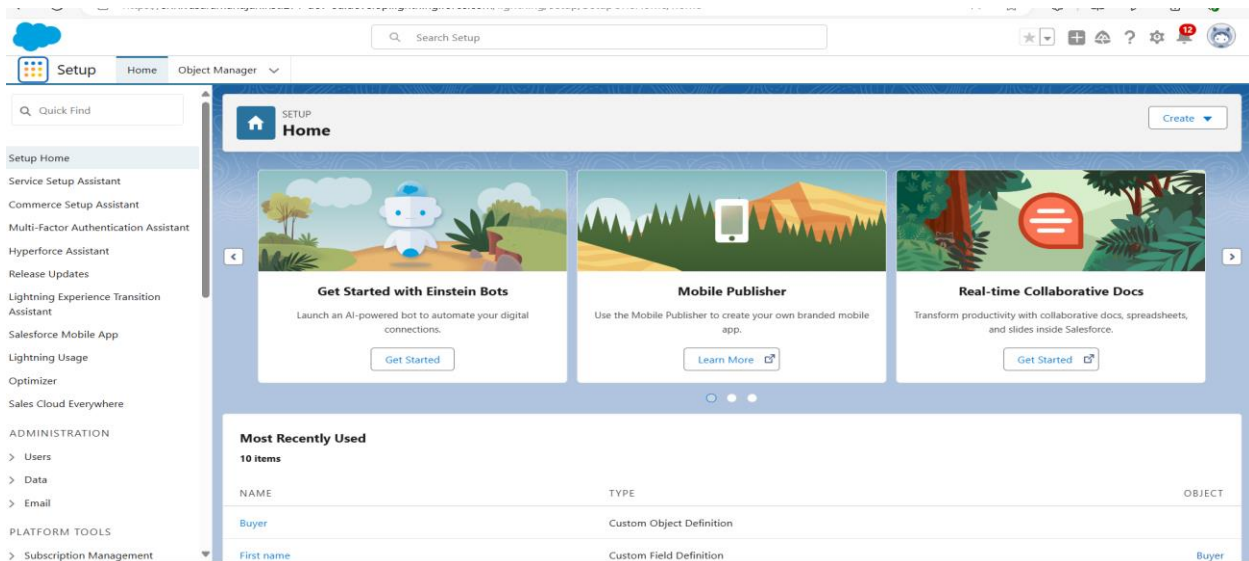
Country/Region*
Country/Region

Postal Code*
Your postal code

Username*
jane@company.sandbox

Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read](#)

Activity 2: Account Activation:



Milestone 2 – Object

What Is an Object?

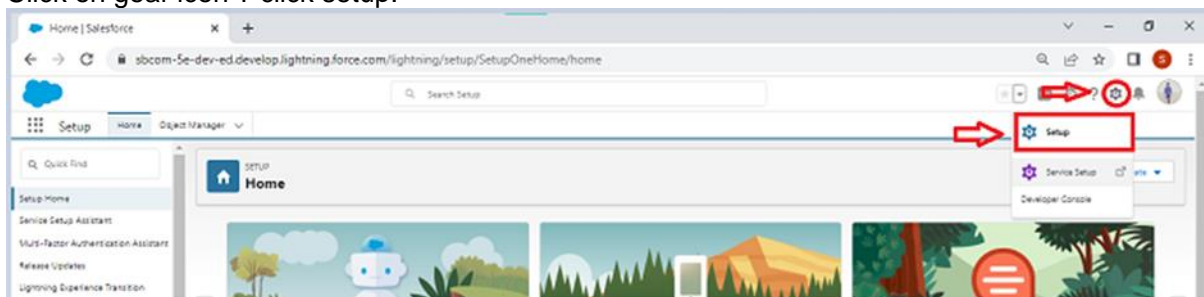
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects?

Salesforce objects are of two types:

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

To Navigate to Setup page:

Click on gear icon ? click setup.

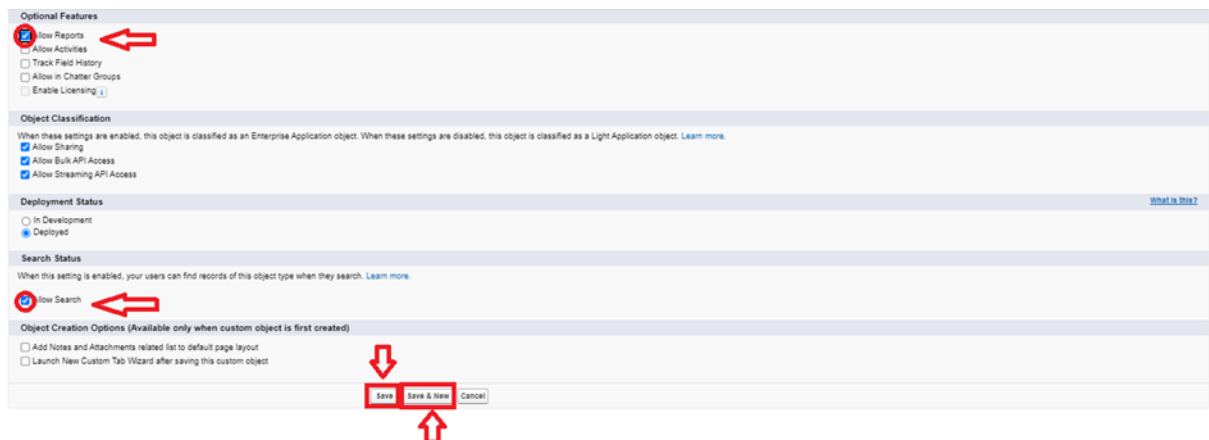
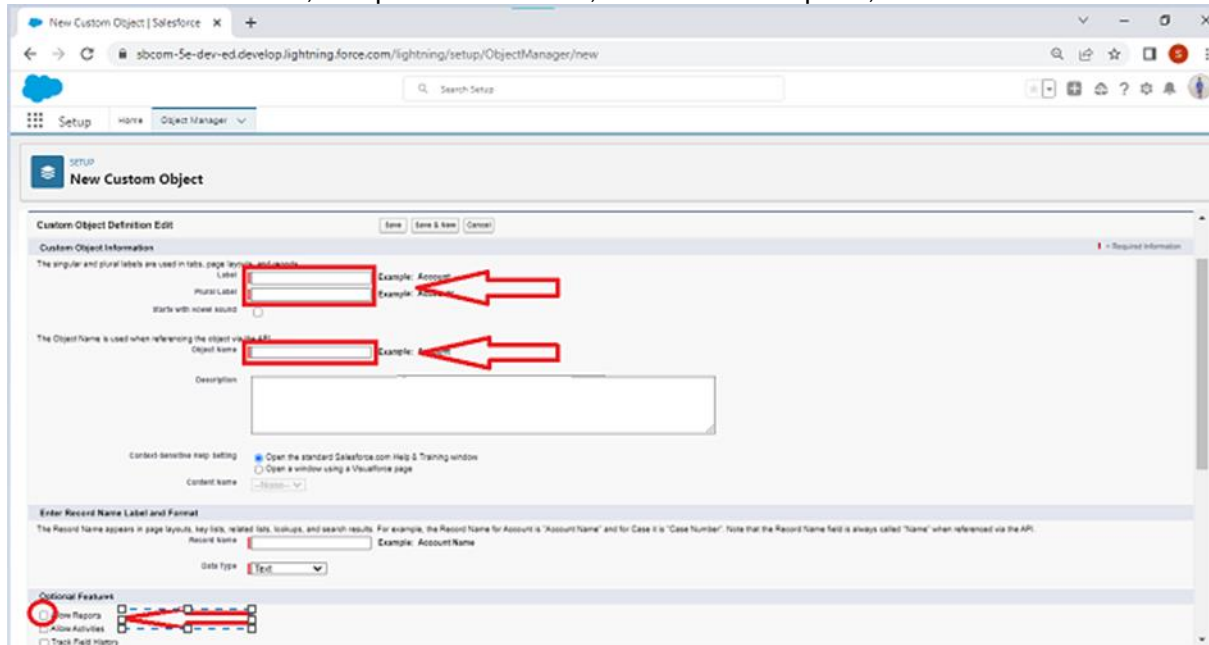


To create an object:

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



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



4. Click on Save.

Activity 1: Create Supplier Object:

To create an object:

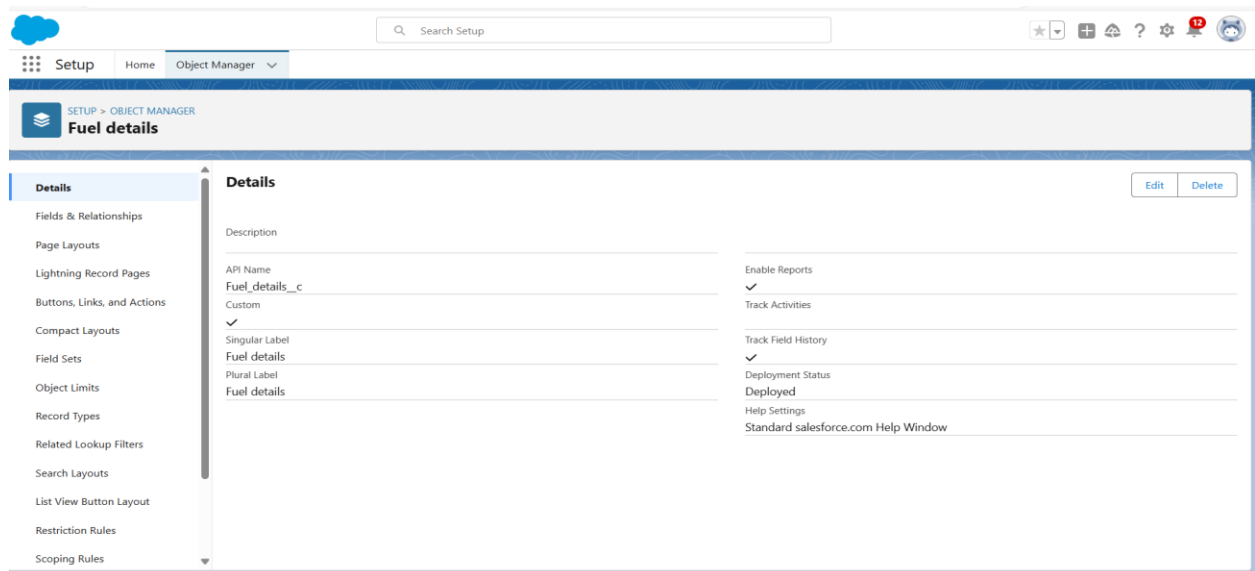
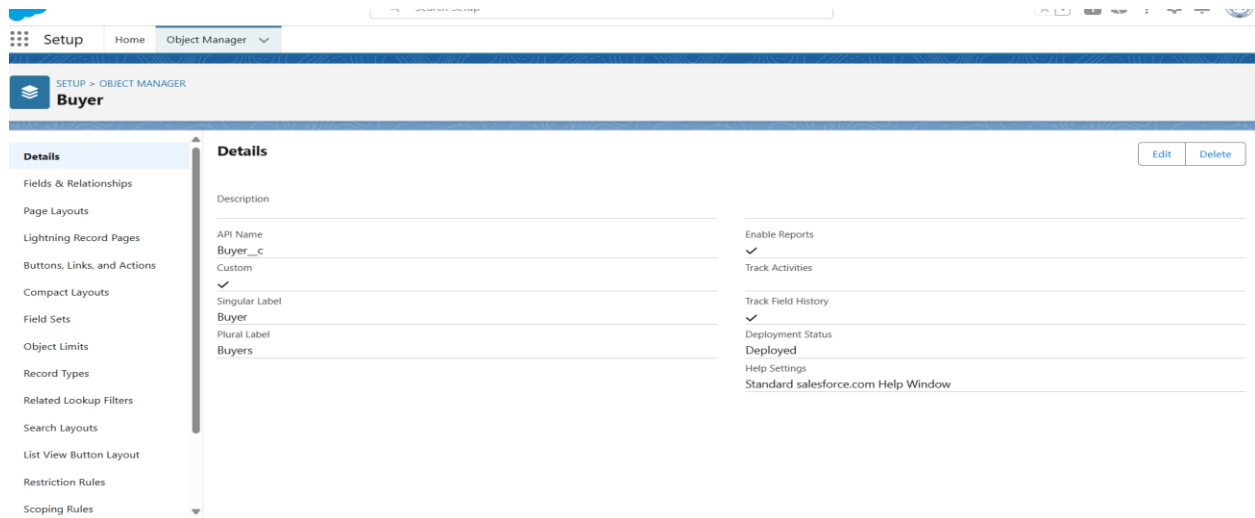
1. From the setup page Click on Object Manager Click on Create Click on Custom Object.
 1. Enter the label name Supplier
 2. Plural label name? Suppliers
 3. Enter Record Name Label and Format
 - Record Name Supplier Name
 - Data Type Name
2. Click on Allow reports and Track Field History,
3. Allow search Save.

The screenshot shows the Salesforce Setup interface for the 'Supplier' object. The left sidebar contains a 'Details' menu with options like Fields & Relationships, Page Layouts, and Object Limits. The main content area is titled 'Details' and includes a description field, API Name (Supplier__c), Custom checkbox, Singular Label (Supplier), Plural Label (Suppliers), and a list of settings: Enable Reports (checked), Track Activities, Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Edit and Delete buttons are in the top right.

Activity 2: Create Gas Station Object

The screenshot shows the Salesforce Setup interface for the 'Gas Station' object. The left sidebar contains a 'Details' menu. The main content area is titled 'Details' and includes a description field, API Name (Gas_Station__c), Custom checkbox, Singular Label (Gas Station), Plural Label (Gas Stations), and a list of settings: Enable Reports (checked), Track Activities, Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Edit and Delete buttons are in the top right.

Activity 3: Create Buyer and Fuel details Objects



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.

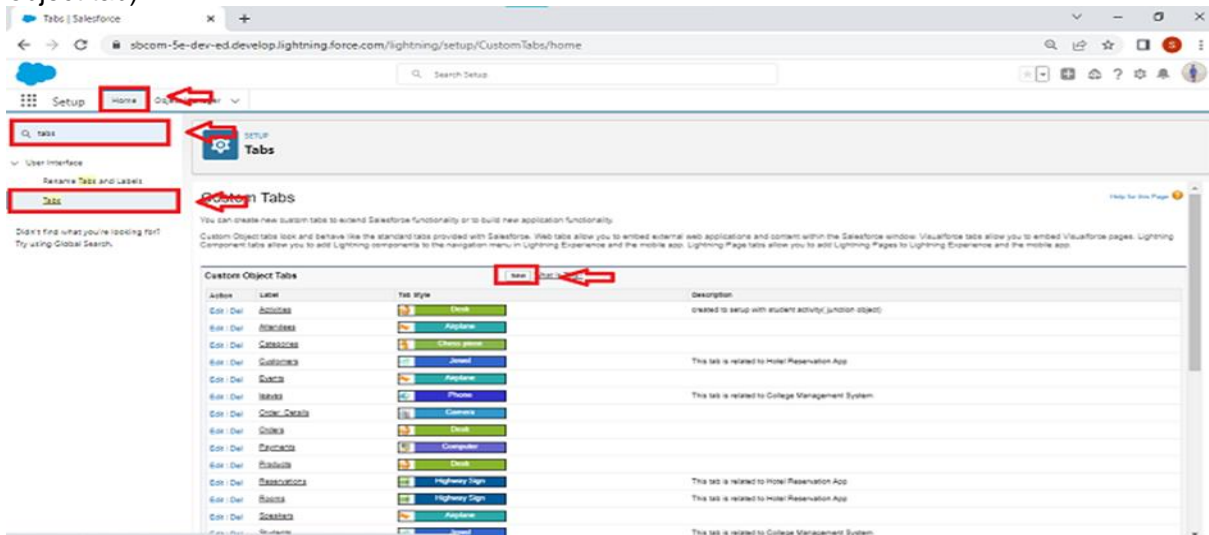
Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs.

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: supplier

Tab Style: --None--

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

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"/>

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 .

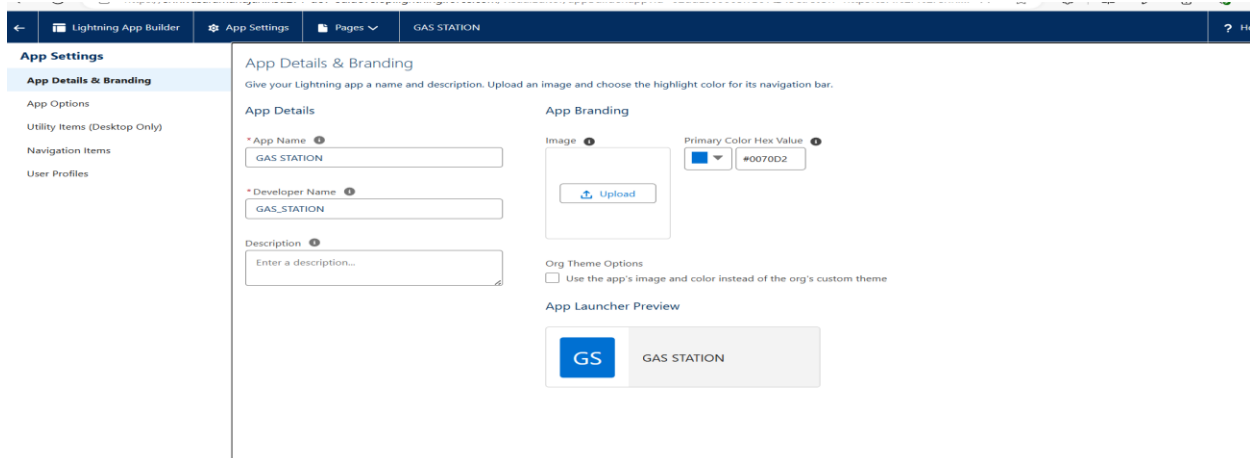
Action	Label	Tab Style	Description
Edit Del	Buyers	Apple	
Edit Del	Fuel details	Balls	
Edit Del	Gas Stations	Alarm clock	
Edit Del	Suppliers	Airplane	

Milestone 4 - The 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



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

SETUP > OBJECT MANAGER
Supplier

Details
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

Supplier Field
Supplier Name
[Back to Supplier](#)

[Set Field-Level Security](#) [View Field Accessibility](#)

Field Information	Field Label	Supplier Name	Field Name	Name
Data Type	Text(80)			
Description				
Data Owner				
Field Usage				
Data Sensitivity Level				
Compliance Categorization				

Validation Rules [New](#) [Validation Rules Help](#)

No validation rules defined.

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.

Setup Home Object Manager

SETUP > OBJECT MANAGER
Gas Station

Details
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
Scoping Rules

Gas Station Field
Gas Station Name
[Back to Gas Station](#)

[Set Field-Level Security](#) [View Field Accessibility](#)

Field Information	Field Label	Gas Station Name	Field Name	Name
Data Type	Auto Number			
Description				
Data Owner				
Field Usage				
Data Sensitivity Level				
Compliance Categorization				
Display Format	Gas-{000}			

Validation Rules [New](#) [Validation Rules Help](#)

No validation rules defined.

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

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 Decimal Places

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.

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.

Setup Home Object Manager

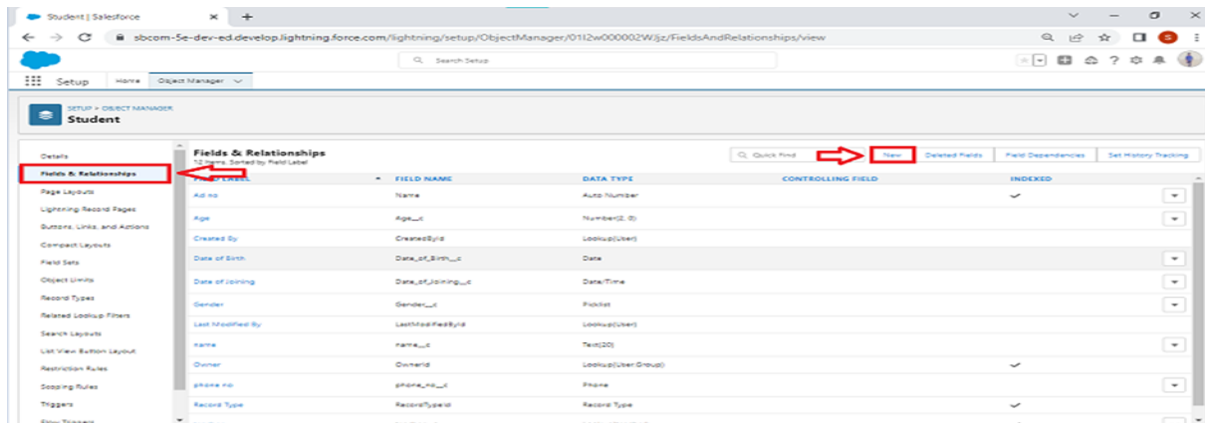
Search Setup

student

Create

OBJECT	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
student		Custom Object	College Management System	15/12/2022	✓
Student Activity	Student_Activity__c	Custom Object	created for the purpose of junction object	25/01/2023	✓

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

Previous **Next** Cancel

Select Object to Summarize = Required Information

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

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

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: `{Move = MYDATE + 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. 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 button to use additional fields, operators, and functions.

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

7. Creating the Formula field in Buyer Object

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

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

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

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

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

12. Insert field formula should be : `First_Name__c + ' ' + Last_Name__c`

13. click “Check Syntax” and Save.

Activity 6: Creating Cross Object Formula Field in Buyer Object

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

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

5. Insert fields formula should be :

Fuel_filled_in_vehicle__c * Gas_Station_name__r.Fuel_price_liter__c

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

Formula Editor interface showing the formula: Amount Paid (Currency) = Fuel_filled_in_vehicle__c * Gas_Station_name__r.Fuel_price_liter__c. The formula is entered in the Simple Formula tab. The interface includes a Functions list on the right and a 'Check Syntax' button.

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. Field Label: Vehicle type. Values: Enter values, with each value separated by a new line. Values entered: Two Wheeler, Three Wheeler, Four Wheeler, Six Wheeler, Eight Wheeler, Others. Field Name: Vehicle_type. Description: . The 'Next' button is highlighted with a red arrow.

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

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:

Previous Next Cancel

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

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

Setup > OBJECT MANAGER > Buyer

Page Layouts

Buyer Detail

Information (Header visible on edit only)

Field	Value
Buyer Name	GEN-2004-001234
Gas Station name	Sample Text
Fuel filled in vehicle	70.052
First name	Sample Text
Last name	Sample Text
Customer name	Sample Text
Vehicle type	Sample Text
Mode of payment	Sample Text
Fuel price/liter	34.646
Amount Paid	565.68
Phone number	1-415-555-1212

System Information (Header visible on edit only)

Field	Value
Created By	Sample Text
Last Modified By	Sample Text

Milestone 7 – Profiles

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

Types of profiles in salesforce

1. **Standard profiles:**

By default salesforce provides below standard profiles.

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

We cannot deleted standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

2. **Custom Profiles:**

Custom ones defined by us.

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

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.

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Profiles' is selected. The main content area shows the 'Clone Profile' dialog. The dialog has a title bar 'Clone Profile' and a subtitle 'Enter the name of the new profile.' Below this, there is a message 'You must select an existing profile to clone from.' followed by a table with three rows: 'Existing Profile' with a dropdown menu showing 'Standard User', 'User License' with a dropdown menu showing 'Salesforce', and 'Profile Name' with a text input field containing 'Manager'. At the bottom of the dialog, there are 'Save' and 'Cancel' buttons. A red arrow points to the 'Save' button.

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 Edit Clone Delete View Users

Name	Manager	Custom Profile	✓
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 = Required Information

	Visible	Default		Visible	Default
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input 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			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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Gas Stations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Fuel details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Suppliers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Session Settings

Session Times Out After: 8 hours of inactivity Session Security Level Required at Login: --None--

Password Policies

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

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

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.

Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
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"/>

Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
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.

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"/>

Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Gas Stations	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Suppliers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. And click save.

Milestone 8 – Role & Role Hierarchy

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

Activity 1: Creating Manager Role

Setup | Home | Object Manager

Roles

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Srinivasa Ramanujan Institute of Technology (SRIT) Ananthapur > CEO > Manager
 Sibings: SVP_Sales & Marketing, SVP_Customer Service & Support, CFO, SVP_Human Resources, COO

Role Detail

Label	Manager	Role Name	Manager
This role reports to	CEO	Role Name as displayed on reports	Manager
Modified by	Manoj.Khamalbar, 12/06/2024, 7:49 pm	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

Users in Manager Role

Action	Full Name	Alias	Username	Active
Edit	Niklaus Mikaelson	nmika	22495a3308@abcsrit.ac.in	✓

Activity 2: Creating another roles

The screenshot shows the Salesforce Setup interface. On the left, a navigation menu includes 'Setup', 'Home', and 'Object Manager'. Below this, a search bar contains 'role'. A list of roles is shown, with 'sales executive' selected. The main content area displays the details for the 'sales executive' role. It includes a 'Role Detail' section with fields for Label, Role Name, and Role Name as displayed on reports. Below this, a table lists users assigned to the role, including Niklaus Mikaelson. The page also includes a 'Users in sales executive Role' section with a table of assigned users.

Search Setup

Setup Home Object Manager

role

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

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

Role

sales executive

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Srinivasa Ramanujan Institute of Technology (SRIT) Ananthapur » CEO » Manager » sales executive

Users in sales executive Role (1)

Role Detail

Edit Delete

Label sales executive

Role Name sales_executive

This role reports to Manager

Role Name as displayed on reports

Modified By Manoj Khamaikar, 12/06/2024, 7:51 pm

Sharing Groups Role, Role and Internal Subordinates

Opportunity Access Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities

Case Access Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases

Users in sales executive Role

Assign Users to Role New User

Users in sales executive Role Help

Action	Full Name	Alias	Username	Active
Edit	Niklaus Mikaelson	nmika	22495a3308@asrit.ac.in	✓

The screenshot shows the Salesforce Setup interface. On the left, a navigation menu includes 'Setup', 'Home', and 'Object Manager'. Below this, a search bar contains 'role'. A list of roles is shown, with 'sales person' selected. The main content area displays the details for the 'sales person' role. It includes a 'Role Detail' section with fields for Label, Role Name, and Role Name as displayed on reports. Below this, a table lists users assigned to the role, including Niklaus Mikaelson. The page also includes a 'Users in sales person Role' section with a table of assigned users.

Search Setup

Setup Home Object Manager

role

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

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

Role

sales person

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Srinivasa Ramanujan Institute of Technology (SRIT) Ananthapur » CEO » Manager » sales executive » sales person

Users in sales person Role (1)

Role Detail

Edit Delete

Label sales person

Role Name sales_person

This role reports to sales_executive

Role Name as displayed on reports

Modified By Manoj Khamaikar, 12/06/2024, 7:53 pm

Sharing Groups Role, Role and Internal Subordinates

Opportunity Access Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities

Case Access Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases

Users in sales person Role

Assign Users to Role New User

Users in sales person Role Help

Action	Full Name	Alias	Username	Active
Edit	Niklaus Mikaelson	nmika	22495a3308@asrit.ac.in	✓

Milestone 9 – Users

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

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

New User

User Edit Save Save & New Cancel

General Information

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

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.

Activity 2: creating another users

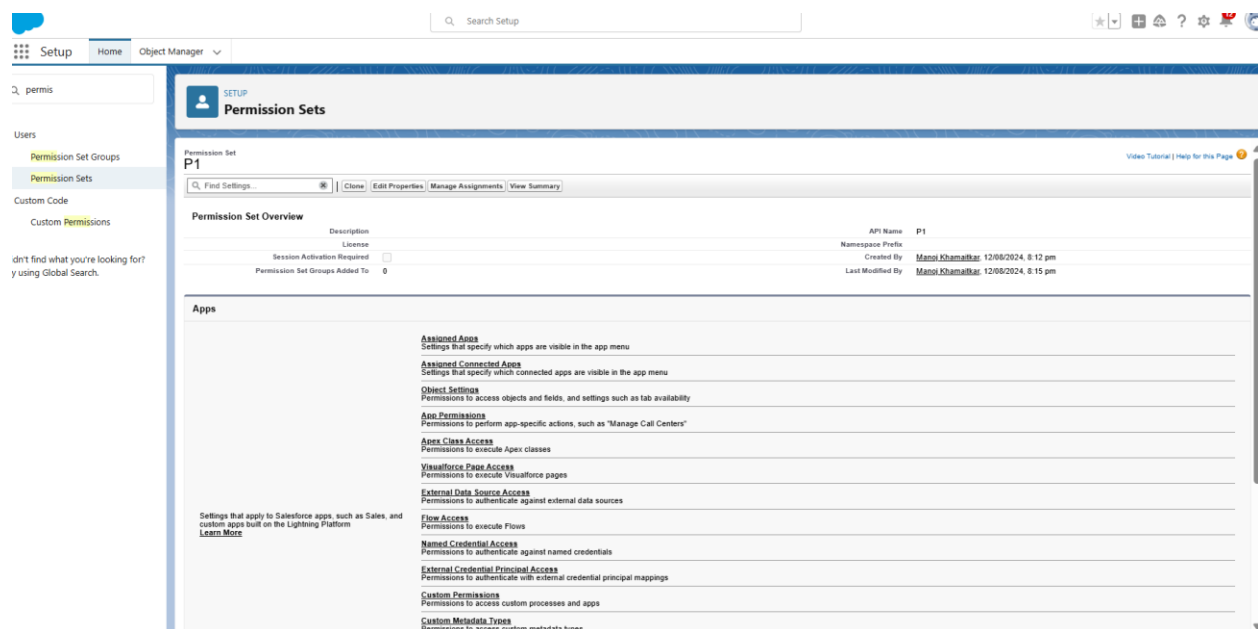
1. Follow the same steps from above activity and create another user using
 - a. Role : sales executive
 - b. User licence : Salesforce Platform
 - c. Profile : sales executive
2. Repeat the steps and create another user using
 - a. Role : sales person
 - b. User licence : Salesforce Platform
 - c. Profile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

Milestone 10 – Users

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

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.



Milestone 11 – Setup For OWD

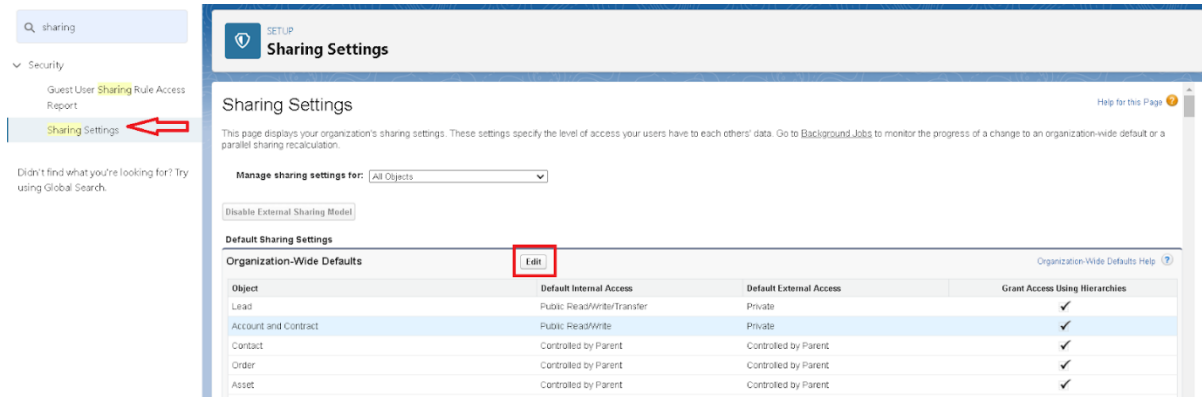
Organization-Wide Defaults, or OWDs, are the pattern security rules that you can follow for your Salesforce instance. Organization Wide Defaults are utilized to confine who can access what information in your CRM. You can award access through different methods that we will discuss later (sharing principles,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

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

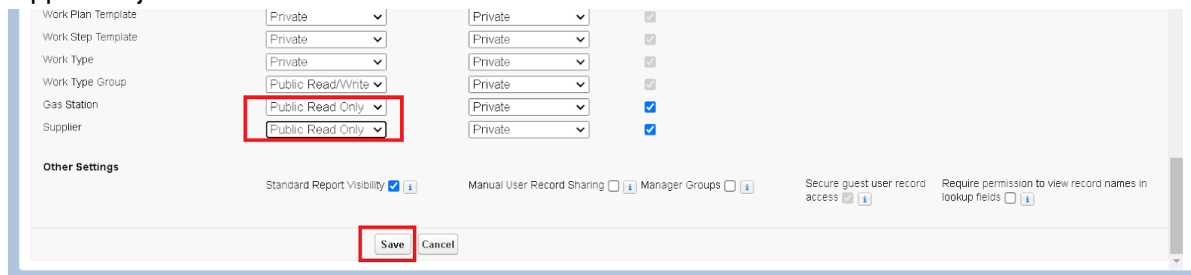
- ? Public Read/Write/Transfer (only available of Enquiry and Cases)
- ? Public Read/Write
- ? Public Read/Only
- ? Private

Activity 1: Create OWD Setting

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



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



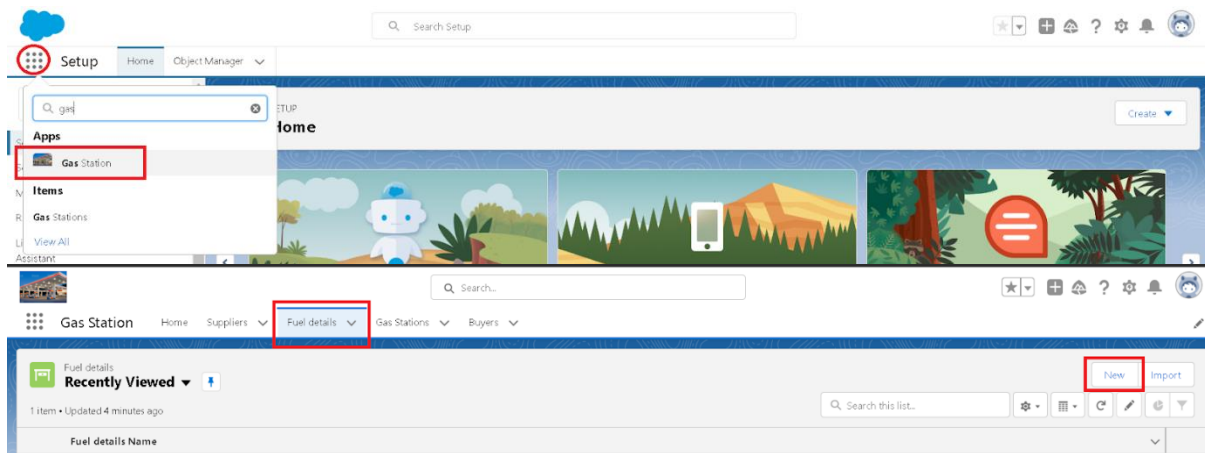
3. Click save.
4. Extra information, By these every profile has their own access, according to their profile.
5. But in our case we created a roles and given the roles in such a way that manager can see sales executive and sales person records , sales executive can see the sales person records.

Milestone 12 – User Adoption

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.



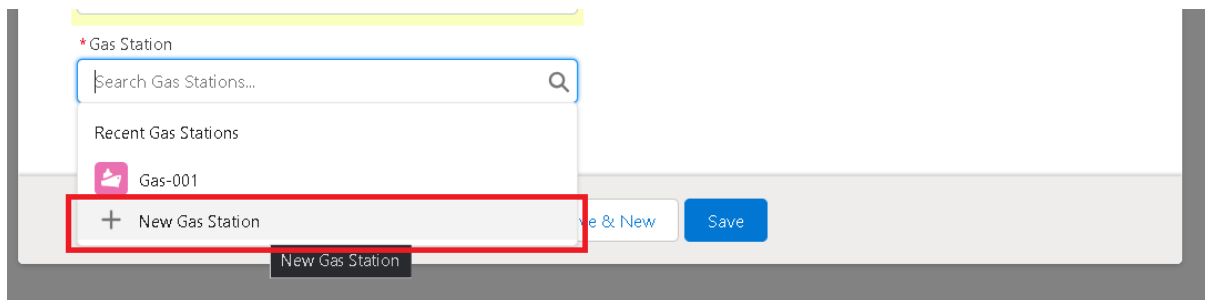
5. Creating the supplier record in fuel detail record, by clicking the “new supplier”.

The 'New Fuel details' form is shown. The 'Supplier name' dropdown menu is open, displaying a search bar, a list of recent suppliers (Indian Oil), and a 'New Supplier' option. A red arrow points to the 'New Supplier' option. The form also includes a 'Gas station' dropdown menu and buttons for 'Cancel', 'Save & New', and 'Save'.

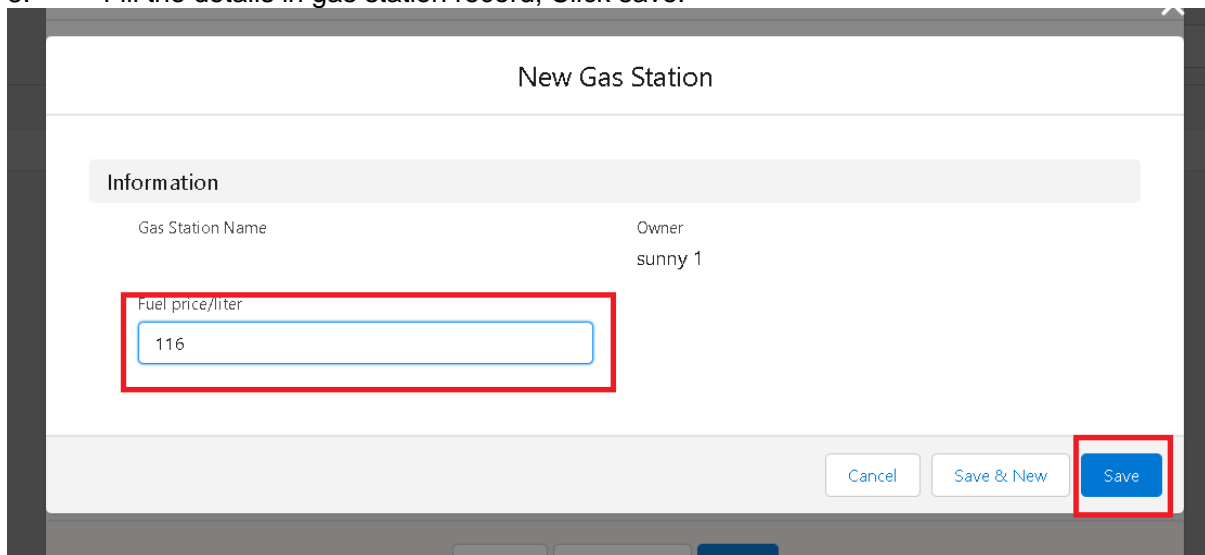
6. Fill the details in supplier record and click on save.

The 'New Supplier' form is shown. The 'supplier Name' field is filled with 'HP'. The 'Owner' field is filled with 'sunny 1'. The 'Save' button is highlighted with a red box.

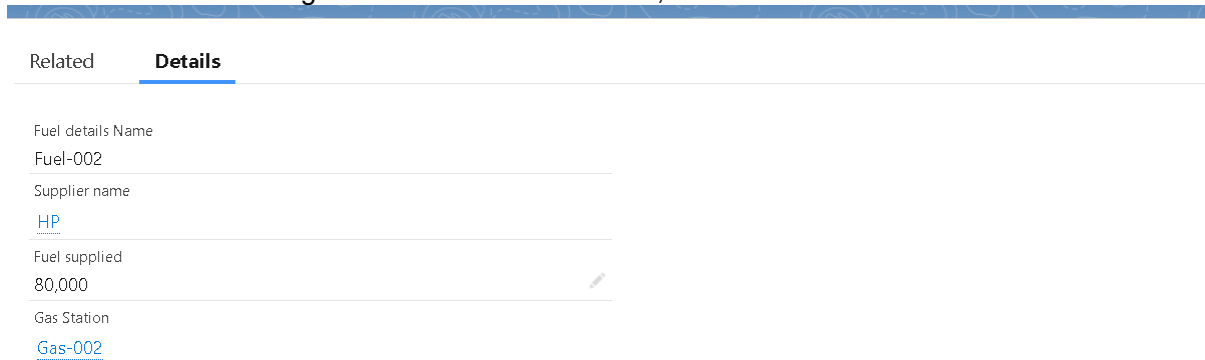
7. Creating the Gas station record in fuel details record, by clicking on new gas station.



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



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



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

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.

Milestone 13 – Reports

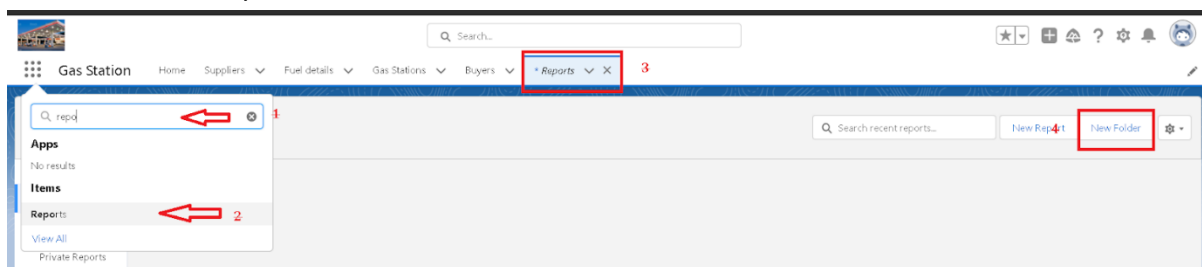
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce

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

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.

Create folder

* Folder Label

Fuel Estimation

* Folder Unique Name

FuelEstimation

Cancel 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.

Gas Station Home Suppliers Fuel details Gas Stations Buyers Reports X

Reports

All Folders 5 items

REPORTS

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	sunny 1	15/6/2023, 10:22 am	sunny 1	15/6/2023, 10:22 am

FOLDERS

All Folders 2

FAVORITES

All Favorites

Share

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

Share folder

These sharing settings apply to all subfolders in this folder.

Share With

Roles

1

Names

Search Roles...

2

Access

View

3

Share

4

Who Can Access

sunny 1

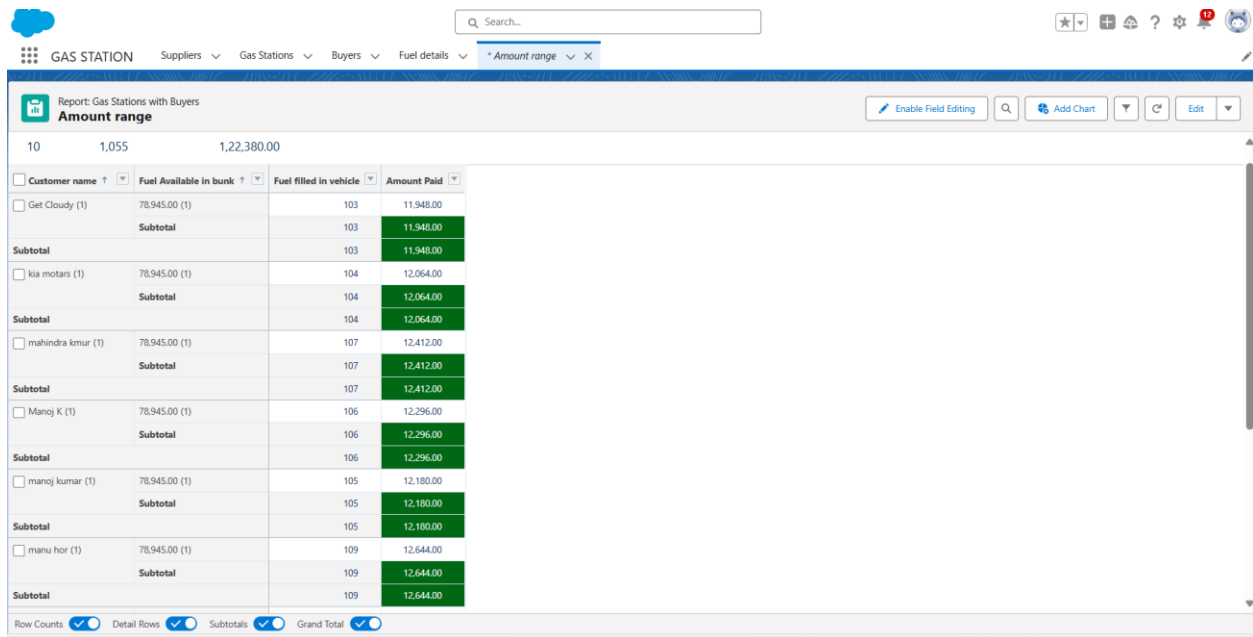
Users

Manage

5

Done

Activity 3: Create Report



Report: Gas Stations with Buyers
Amount range

10 1,055 1,22,380.00

Customer name	Fuel Available in bunk	Fuel filled in vehicle	Amount Paid
Get Cloudy (1)	78,945.00 (1)	103	11,948.00
Subtotal		103	11,948.00
kia motars (1)	78,945.00 (1)	104	12,064.00
Subtotal		104	12,064.00
mahindra kmur (1)	78,945.00 (1)	107	12,412.00
Subtotal		107	12,412.00
Manoj K (1)	78,945.00 (1)	106	12,296.00
Subtotal		106	12,296.00
manoj kumar (1)	78,945.00 (1)	105	12,180.00
Subtotal		105	12,180.00
manu hor (1)	78,945.00 (1)	109	12,644.00
Subtotal		109	12,644.00

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒

Milestone 14 – Dashboards

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

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.

*Folder Label

Amount estimation dashboard

*Folder Unique Name

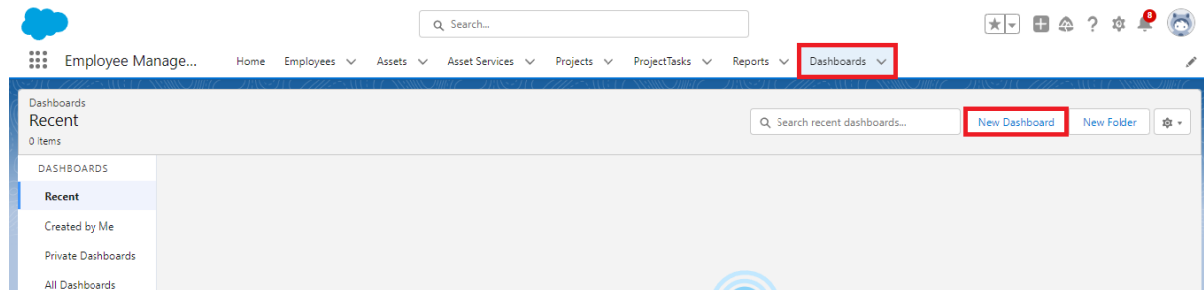
Amountestimationdashboard

Cancel Save

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

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.

New Dashboard

*** Name**

Estimation amount

Description

Folder

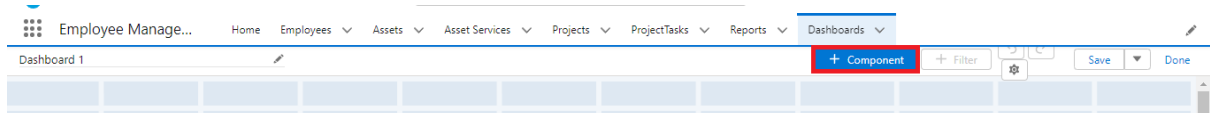
Amount estimation dashboard

Select Folder

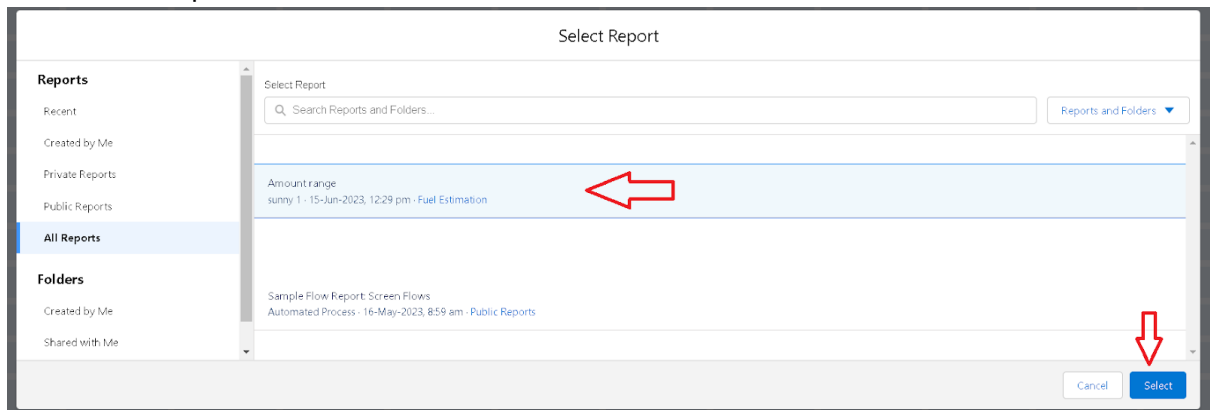
Cancel

Create

3. Select add component.



4. Select a Report and click on select.



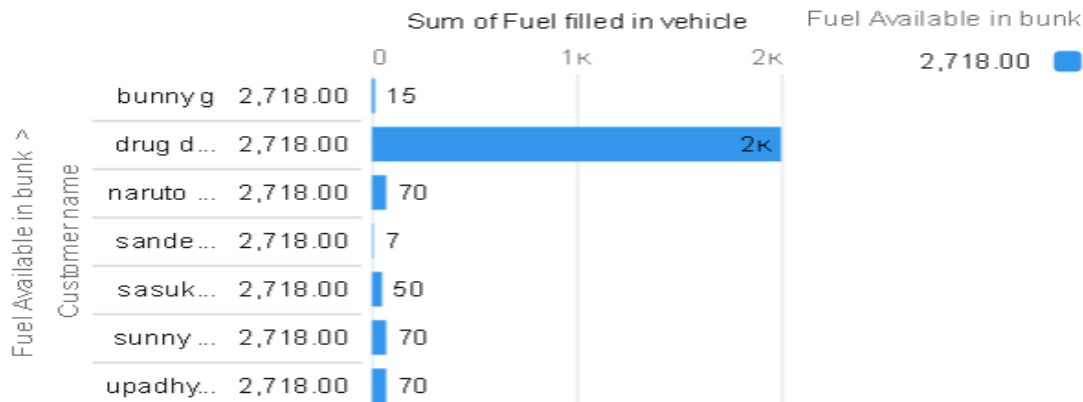
5. Click Add then click on Save and then click on Done.
6. Preview is shown below.



Dashboard Estimation amount

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

Amount range

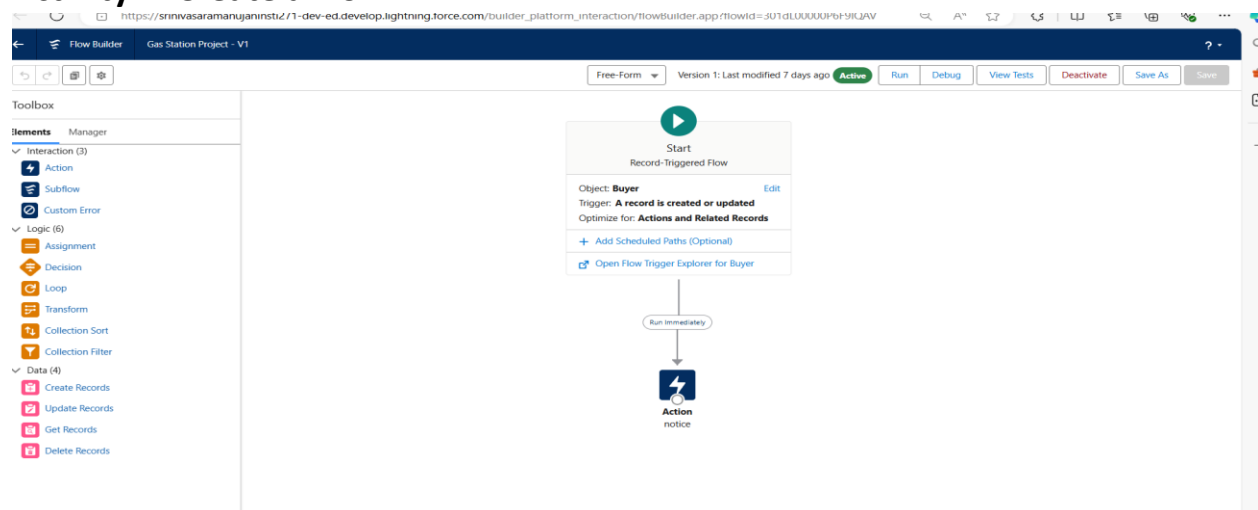


[View Report \(Amount range\)](#)

Milestone 15 – Flows

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

Activity 1: Create a Flow



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.