

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

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Index Page

Topics	Page No
Project Abstract	3
Introduction	4
Creating Developer Account	5
Creation of Objects	6
Creating Custom Tabs	7
A Lighting App	7
Creating Fields for the Objects	7
Creation of Page Layouts	13
Profiles	14
Role & Role Hierarchy	16
Users	19
Permission Sets	20
Setup for OWD	22
User Adoption	23
Reports	28
Dashboards	34
Flows	36

Project Abstract

In the modern era, efficient management of gas filling stations is crucial to ensure operational effectiveness and customer satisfaction. The implementation of a Customer Relationship Management (CRM) system tailored specifically for gas filling stations offers a comprehensive solution to streamline administrative tasks and enhance service delivery. This application integrates various functionalities to assist administrators in managing customer data, scheduling services, monitoring inventory, and generating reports.

The CRM system provides a centralised platform where administrators can track customer interactions, manage loyalty programs, and handle complaints or feedback seamlessly. It enables the automation of routine tasks such as billing, invoicing, and maintenance scheduling, thereby reducing manual effort and minimising errors. Additionally, the system offers robust analytics and reporting tools to help administrators make data-driven decisions, optimize resource allocation, and improve overall operational efficiency.

Key features of the CRM application include:

1. **Customer Management:** Storing and managing detailed customer profiles, purchase history, and preferences.
2. **Service Scheduling:** Automating service appointments and reminders for regular maintenance.
3. **Inventory Control:** Monitoring fuel levels, tracking supplies, and managing orders to ensure uninterrupted service.
4. **Billing and Invoicing:** Streamlining the billing process with automated invoice generation and payment tracking.
5. **Reporting and Analytics:** Generating insightful reports on sales, customer behaviour, and operational metrics to aid in strategic planning.

By leveraging this CRM application, gas filling station administrators can enhance customer satisfaction, improve operational efficiency, and drive business growth through better resource management and informed decision-making.

INTRODUCTION

A CRM-based application for managing a gas filling station can streamline the overall operations and improve customer experience. The CRM can help automate key tasks, improve communication, track customer interactions, and manage inventory efficiently.

Below is a brief overview of how a CRM could be utilised by an admin:

1. Customer Management:

- Customer Profiles: Store customer details (name, contact info, purchase history).
- Loyalty Programs: Track regular customers and offer discounts or rewards.
- Communication: Automated SMS or email notifications for reminders (next refill, promotions, etc.).

2. Order & Refill Management:

- Order Tracking: Log orders with status updates (pending, in-progress, completed).
- Refill Scheduling: Schedule gas refills and assign them to available technicians.
- Inventory Alerts: Notify when gas levels are low and need restocking.

3. Inventory & Asset Management:

- Inventory Tracking: Monitor gas stock in real time, including cylinder levels and tank capacity.
- Asset Maintenance: Log maintenance schedules for gas equipment (cylinders, pumps, etc.) and notify when service is due.

4. Billing & Invoicing:

- Automated Invoicing: Generate and send invoices for gas purchases automatically.
- Payment Tracking: Record payments and notify customers of outstanding bills.

5. Reports & Analytics:

- Sales Analysis: Generate reports on daily, weekly, or monthly gas sales.
- Customer Insights: Analyse customer data to understand preferences and improve services.
- Inventory Reports: Get reports on inventory levels to avoid stock outs.

6. Safety & Compliance:

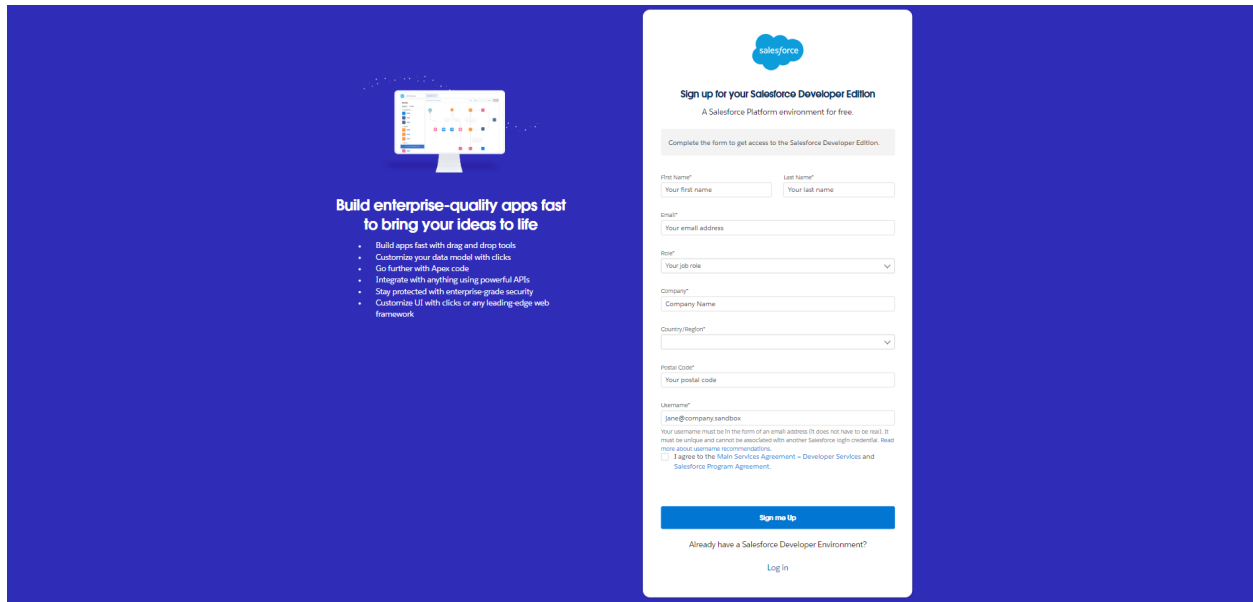
- Compliance Tracking: Ensure compliance with government regulations and maintain necessary documentation.
- Safety Alerts: Notify staff and customers of safety measures and maintenance checks.

By using a CRM system, the gas filling station can streamline operations, improve customer satisfaction, and ensure compliance with safety standards.

Setup Guide

1. Creating a Salesforce Developer Account:

1. Visit [Salesforce Developer Signup](#).



2. Fill out the signup form:
 - First Name & Last Name
 - Email
 - Role: Developer
 - Company: College Name
 - Country: India
 - Postal Code: Your Pin Code
 - Username: (e.g., [username@organization.com](#))

2. Account Activation

1. Check your email inbox for a verification email from Salesforce.
2. Click Verify Account.
3. Set up your password and security question, then click Change Password.

3. Creating Salesforce Objects

3.1 Supplier Object

1. Go to Object Manager > Create > Custom Object.
2. Configure the following:
 - Label Name: Supplier
 - Plural Label Name: Suppliers
 - Record Name: Supplier Name (Text)
3. Enable Allow Reports, Track Field History, and Allow Search.
4. Click Save.

3.2 Gas Station Object

1. Go to Object Manager > Create > Custom Object.
2. Configure the following:
 - Label Name: Gas Station
 - Plural Label Name: Gas Stations
 - Record Name: Gas Station (Auto Number)
 - Display Format: Gas-{000}, Starting Number: 1
3. Enable Allow Reports, Track Field History, and Allow Search.
4. Click Save.

3.3 Buyer and Fuel Details Objects

3.3.1 Buyer Object

1. Go to Object Manager > Create > Custom Object.
2. Configure the following:
 - Label Name: Buyer
 - Plural Label Name: Buyers
 - Display Format: Buyer-{000}, Starting Number: 1

3.3.2 Fuel Details Object

1. Go to Object Manager > Create > Custom Object.

2. Configure the following:
 - Label Name: Fuel details
 - Plural Label Name: Fuel details
 - Display Format: fuel-{000}, Starting Number: 1

4. Creating Custom Tabs

1. Go to Setup > Tabs > New (under Custom Object Tabs).
2. Select the object (e.g., Supplier), choose a tab style, and click Next.
3. Configure profile visibility as needed and click Next.
4. uncheck the include tab.
5. Make sure that the Append tab to users' existing personal customizations is checked.
6. Click Save.

Repeat for remaining objects (Gas station, Buyer, Fuel details).

5. Creating a Lightning App

1. Go to Setup > App Manager > New Lightning App.
2. Configure the app:
 - App Name: GAS STATION
 - Leave other settings as default and click Next.
3. Add navigation items (Supplier, Gas Station, Buyer, Receipt) and click Next.
4. Assign the System Administrator profile to the app and click Save & Finish.

6. Creating Fields for Objects

6.1 Junction Object

Fuel details with Supplier

1. Go to Setup > Object Manager > Fuel details > Fields & Relationships > New.
2. Select Master-Detail Relationship > Next
 - Object: Supplier

- . Field label: Supplier Name
- . Leave other settings as default and click Next.
- . Click Save & New.

Fuel details with Gas Station

1. Go to Setup > Object Manager > Fuel details > Fields & Relationships > New.
2. Select Master-Detail Relationship > Next
 - . Object: Gas station
 - . Field label: Gas Station
 - . Leave other settings as default and click Next.
 - . Click Save.

6.2 Master-Detail Relationship

Relationship between Buyer & Gas Station Object

1. Go to Setup > Object Manager > Buyer > Fields & Relationships > New.
2. Select Master-Detail Relationship > Next
 - . Object: Gas station
 - . Field label: Gas Station Name
 - . Leave other settings as default and click Next.
 - . Click Save

6.3 Number field in Fuel Details & Buyer Objects

Number field in Fuel Details Object

1. Go to Setup > Object Manager > Fuel details > Fields & Relationships > New.
2. Select Number > Next
 - . Field label: Fuel Supplied
 - . Length: 5
 - . Field Name will be auto populated.
 - . Leave other settings as default and click Next.
 - . Click Save.

Number field in Buyer Object

1. Go to Setup > Object Manager > Buyer > Fields & Relationships > New.
2. Select Number > Next
 - Field label: Fuel filled in vehicle
 - Length: 5
 - Field Name will be auto populated.
 - Leave other settings as default and click Next.
 - Click Save.

6.4 Creating Roll-Up Summary

Roll-up summary field on Supplier Object

1. Go to Setup > Object Manager > Supplier > Fields & Relationships > New.
2. Select Roll Up Summary > Next
 - Field label: Fuel Supplied
 - Field Name will be auto populated > Next
 - Summarized Object: Fuel Details
 - Roll type: Sum
 - Field to aggregate: Fuel Supplied
 - Leave other settings as default and click Next
 - Click Save.

Roll-up summary field on Gas Station Object

1. Go to Setup > Object Manager > Gas station > Fields & Relationships > New.
2. Select Roll Up Summary > Next
 - Field label: Fuel supplied to bunk
 - Field Name will be auto populated > Next
 - Summarized Object: Fuel Details
 - Roll type: Sum
 - Field to aggregate: Fuel Supplied
 - Leave other settings as default and click Next

- Click Save.

Roll-up summary field on Gas Station Object

1. Go to Setup > Object Manager > Gas station > Fields & Relationships > New.
2. Select Roll Up Summary > Next
 - Field label: Fuel used
 - Field Name will be auto populated > Next
 - Summarized Object: Buyer
 - Roll type: Sum
 - Field to aggregate: Fuel filled in vehicle
 - Leave other settings as default and click Next.
 - Click Save.

6.5 Creating Formula field in Gas Station Object

Field for Gas Station Object

1. Go to Setup > Object Manager > Gas station > Fields & Relationships > New.
2. Select Formula > Next
 - Field label: Fuel Available in Bunk
 - Field Name: Fuel Available in Bunk
 - Formula return type: Number > Next
 - Under Advanced Formula
 - Insert field formula : Fuel_supplied_to_bunk__c - Fuel_Used__c
 - Click "Check Syntax"
 - Click Save.

Field for Buyer Object

1. Go to Setup > Object Manager > Buyer > Fields & Relationships > New.
2. Select Formula > Next
 - Field label: Customer Name
 - Field Name: Customer Name
 - Formula return type: Text > Next
 - Under Advanced Formula

- . Insert field formula : First_Name__c + '' + Last_Name__c
- . Click "Check Syntax"
- . Click Save.

6.6 Creating Cross Object Formula Field in Buyer Object

1. Go to Setup > Object Manager > Buyer > Fields & Relationships > New.
2. Select Formula > Next
 - . Field label: Amount Paid
 - . Field Name: Amount Paid
 - . Formula return type: Number > Next
 - . Under Advanced Formula
 - . Insert field formula :

Fuel_filled_in_vehicle__c * Gas_Station_name__r.Fuel_price_liter__c
 - . Click "Check Syntax"
 - . Click Save.

6.7 Creating Picklist field in Buyer Object

1. Go to Setup > Object Manager > Buyer > Fields & Relationships > New.
2. Select Picklist > Next
 - . Field label: Vehicle type
 - . Under Values > "Enter values, with each value separated by a new line"
 - . The values are: two wheeler,

three wheeler,

four wheeler,

six wheeler,

eight wheeler and Others.
 - . click Next.
 - . Leave other settings as default and click Next.
 - . Click Save & New.

1. Go to Setup > Object Manager > Buyer > Fields & Relationships > New.
2. Select Picklist > Next
 - Field label: Mode of Payment
 - Under Values > "Enter values, with each value separated by a new line"
 - The values are: credit card,
debit card,
net banking,
upi,
cash.
 - click Next.
 - Leave other settings as default and click Next.
 - Click Save & New.

6.8 Creating The Validation Rule

1. Go to Setup > Object Manager > Buyer
2. Select Validation Rule > New
 - Rule Name: Phone
 - Insert the Error Condition Formula as :-
`NOT(REGEX(Phone_Number__c , "[6-9]{1}[0-9]{9}"))`
 - Error Message: incorrect data
 - Error Location: Field > Select "Phone Number"
 - Click Save.

6.9 Creating Remaining Fields in Buyer Object

Field Name	Data Type
First Name	Text
Last Name	Text
Customer Name	Formula
Phone Number	phone
email	email

7. Creating The Page Layouts


1. Go to Setup > Object Manager > Buyer > Page Layouts > New.
2. Select the existing page layout
3. page layout name: "Customer layout" > click save.

Create New Page Layout Help

As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names are translated for your international users.

Existing Page Layout

Page Layout Name



4. section field: Buyer details > create the section.
5. section name: "Personal details" > click Ok.

Customer name Gas Station name Phone Number
Email
First Name

Section Properties

Section Name


Display Section Header On ☒ Detail Page ☒ Edit Page

Layout

☐ 1-Column ☒ 2-Column

Tab-key Order

☒ Left-Right ☐ Top-Down



6. Drag the fields to this section that is mentioned; they are
First name, last name, customer name, phone number, email, Gas station name.

7. 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 the vehicle, vehicle type.
9. Another section is “Receipt details ”, and drag the fields that are
Mode of payment, Amount paid.
10. Click save.

The screenshot shows a form layout editor interface. The top bar contains buttons: Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. On the left, a 'Fields' panel lists available fields: First Name, Last Name, Customer name, Phone Number, Email, Gas Station name, Fuel filled in vehicle, Vehicle type, Mode of payment, and Amount Paid. The main area displays a form with three sections: Personal Details, Vehicle Info, and Receipt details. A red box highlights the Personal Details and Vehicle Info sections. The Personal Details section includes fields for First Name, Last Name, Customer name, Phone Number, Email, and Gas Station name. The Vehicle Info section includes fields for Fuel filled in vehicle and Vehicle type. The Receipt details section includes fields for Mode of payment and Amount Paid.

8. Profiles

8.1 Manager Profile

1. Go to Setup > in the search bar, type profiles > click on profile > clone the desired profile (Standard User)
 - Profile name: Manager > Save.
2. In profile page > Edit

Profile Manager Help for this Page ?

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
5. Give access permissions for Buyers, Fuel details, gas station and supplier objects
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 " > Click Save.

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"/>		<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"/>		<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"/>		<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"/>		<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: ☒

8.2 Sales Executive Profile

1. Go to setup > in the search bar, type profiles > click on profile > clone the desired profile (Salesforce Platform User)

- . Profile name: sales executive > Save.
- 2. In the profile page > click Edit.
- 3. Select the Custom App settings as default for the Gas station.
- 4. Scroll down to Custom Object Permissions
- 5. Give access permissions for Buyers, Fuel details, gas station and supplier objects
- 6. Click Save.

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"/>

8.3 Sales Person Profile

- Go to setup > in the search bar, type profiles > click on profile > clone the desired profile (Salesforce Platform User)
 - . Profile name: sales person> Save.
2. In the profile page > click Edit.
3. Select the Custom App settings as default for the Gas station.
4. Scroll down to Custom Object Permissions
5. Give access permissions for Buyers, Fuel details, gas station and supplier objects
6. Click Save.

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"/>

9. Creating Role & Role Hierarchy

9.1 Creating Manager Role

- Go to setup > search for Roles > click on set up Roles
- Click on Expand All > click on add role under whom this role works.

- Label: Manager
- Role name generates itself.
- Click Save.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

[-] Nick Enterprises

 Add Role

[-] CEO [Edit](#) | [Del](#) | [Assign](#)

 Add Role

[-] HR [Edit](#) | [Del](#) | [Assign](#)

 Add Role

[-] Manager [Edit](#) | [Del](#) | [Assign](#)

 Add Role

[-] On Site Emp [Edit](#) | [Del](#) | [Assign](#)

 Add Role

[-] Remote Emp [Edit](#) | [Del](#) | [Assign](#)

 Add Role

[-] SVP, Customer Service & Support [Edit](#) | [Del](#) | [Assign](#)

9.2 Creating Another Roles Under Manager Role

1. Go to setup > search for Roles > click on set up Roles
2. Click plus on the CEO role. 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

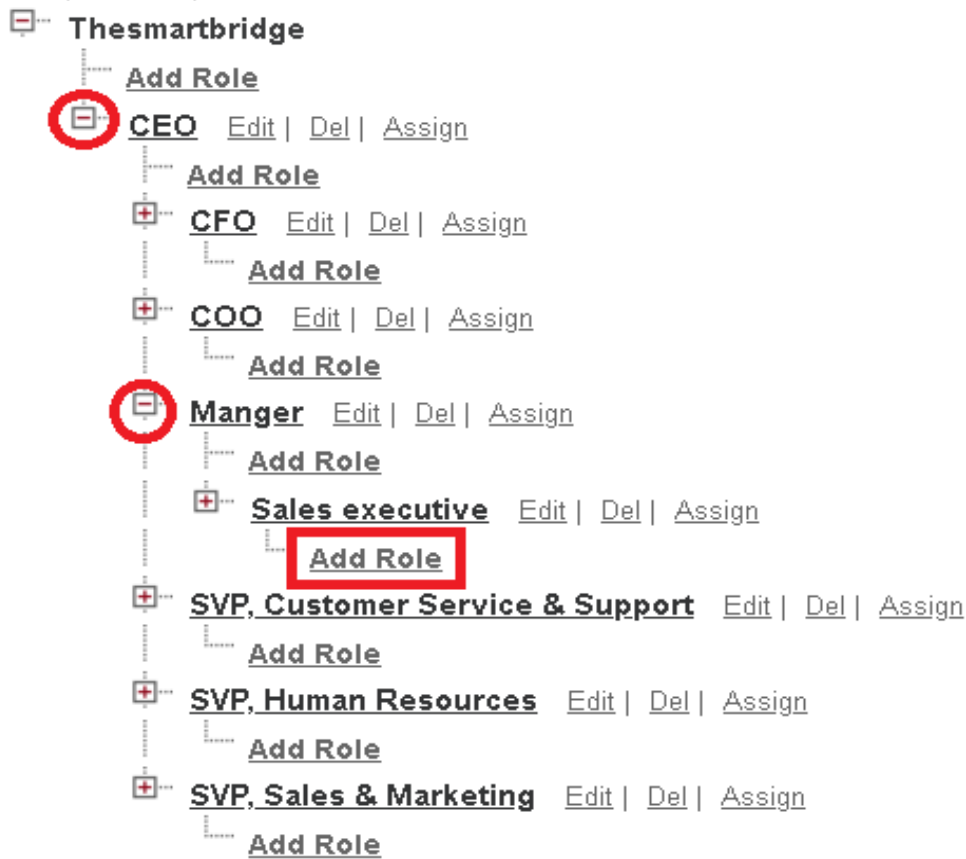
[-] SVP, Sales & Marketing [Edit](#) | [Del](#) | [Assign](#)

 Add Role

- . Label: sales executive
 - . Role name generates itself > Click Save.
3. Repeat the same steps for another role
 4. Click plus on CEO Role > Click plus on manager
 5. Click add role under sales executive

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

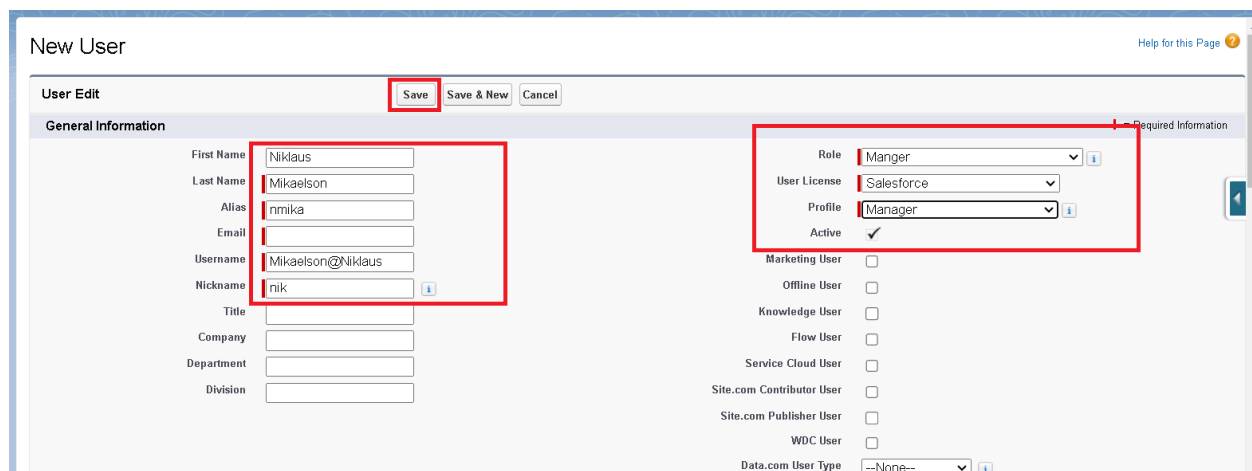


- . Label: sales person
- . Role name generates itself > Click Save.

10. Creation Of Users

10.1 Creating a user

1. Go to setup > in the search bar type users > select users > New user
 - First Name : Niklaus
 - Last Name : Mikaelson
 - Alias : Give an Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: text@text.text
 - Nick Name : Give a Nickname
 - Role : Manager
 - User licence : Salesforce
 - Profiles : Manager
2. Click Save.



New User

Help for this Page ?

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:

Required Information

Role: Manger
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--

10.2 Creating Another users

1. Follow the same steps from the 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

11. Creating Permission Sets

1. Go to setup > type permission sets > select permission sets > New
 - o. Label Name: P1
 - o. API will be auto populated > Save.
2. In the profile page > click Edit.
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

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

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

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"/>

- After saving the permission, click on the Manage assignment
- Now click on the Add Assignment.

Current Assignments **Add Assignment**

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

All Users ▾

1 item selected

Search this list...

	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.2vhahccacrdajuzh67mibr0rqsab11dhzd@smart.com		<input type="checkbox"/>	Force.com - Free User
<input type="checkbox"/>	Brochan Pane	bpane	bpane.kh061622.nvopq5ltd9yi.cwkqyhudbsxb@smart.com		<input type="checkbox"/>	Break Glass Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d5i00000dpzofead.nb26j1owcvnq@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Cirrus Cash Flow	cirr	cirrus@cashflow.com		<input type="checkbox"/>	System Administrator

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

12. Setup for OWD

Create OWD settings

1. Go to setup > type sharing settings > click edit.
2. Scroll down, change the default internal access to “public read-only” for Gas station and Supplier object.
3. Click Save.

Work Plan Template	Private	Private	<input checked="" type="checkbox"/>
Work Step Template	Private	Private	<input checked="" type="checkbox"/>
Work Type	Private	Private	<input checked="" type="checkbox"/>
Work Type Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
Gas Station	Public Read Only	Private	<input checked="" type="checkbox"/>
Supplier	Public Read Only	Private	<input checked="" type="checkbox"/>

Other Settings

Standard Report Visibility ☒ Manual User Record Sharing ☐ Manager Groups ☐ Secure guest user record access ☐ Require permission to view record names in lookup fields ☐

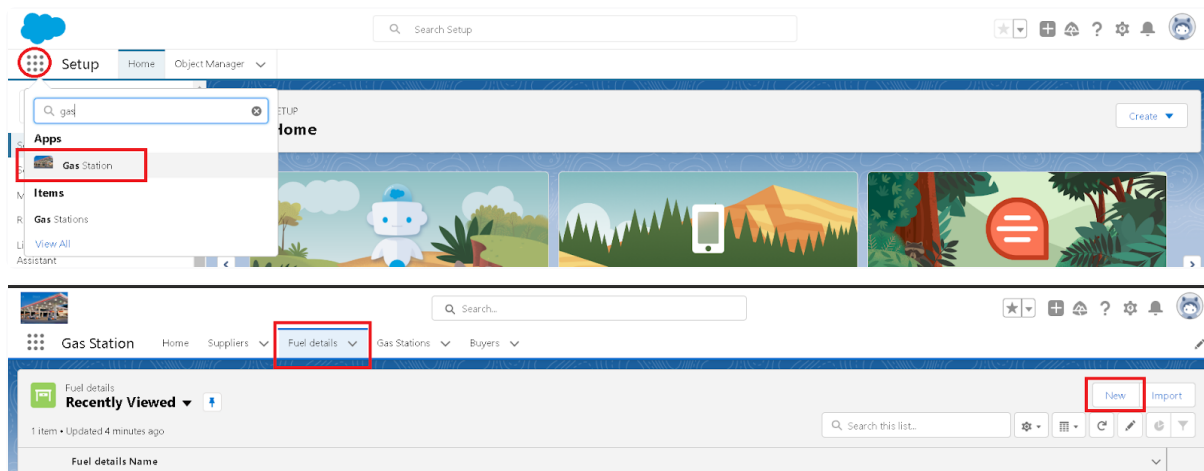
Save **Cancel**

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 the manager can see sales executive and sales person records; the sales executive can see the sales person records.

13. User Adoption

13.1 Create a Record

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



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

The screenshot shows the 'New Fuel details' form. At the top, there's a title 'New Fuel details' and a legend '* = Required Information'. Below this is the 'Information' section. It contains a 'Fuel details Name' field. The 'Supplier name' field is a dropdown menu with a search icon. The dropdown is open, showing 'Recent Suppliers' with 'Indian Oil' and a '+ New Supplier' option. A red arrow points to the '+ New Supplier' option. Below the dropdown is a 'Gas Station' search field. At the bottom, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

6. Fill out the details in the supplier record > Click Save.

The screenshot shows the 'New Supplier' form. It has a title 'New Supplier' and an 'Information' section. The 'supplier Name' field is highlighted with a red box and contains the text 'HP'. To the right of this field is the 'Owner' field, which contains the text 'sunny 1'. At the bottom right, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The 'Save' button is highlighted with a red box.

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

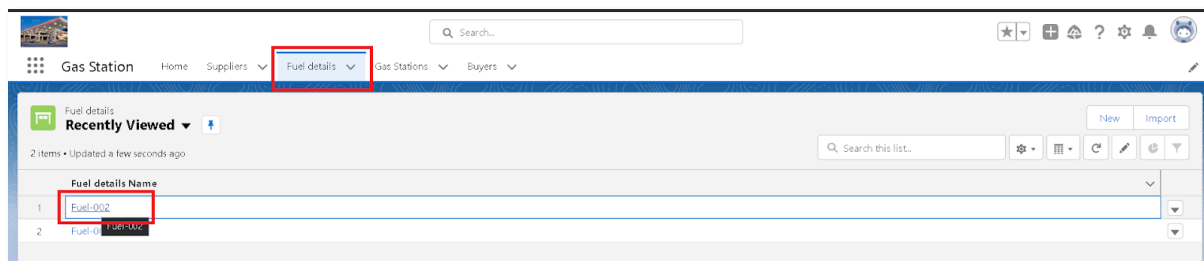
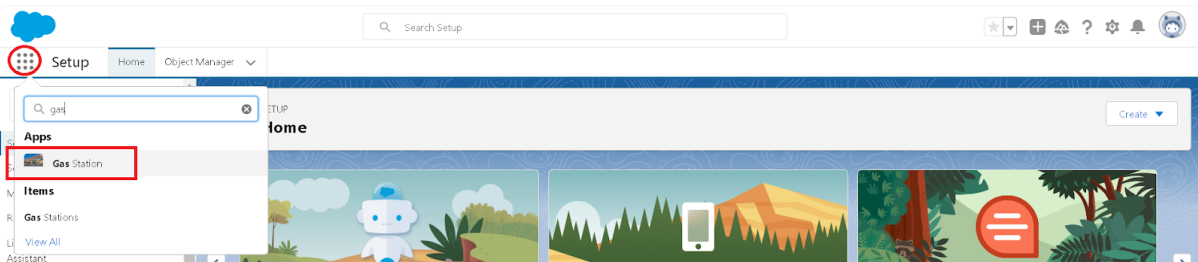
8. Fill out the details in the gas station record > Click Save.

9. Fill out the remaining details in the fuel detail record > Click Save.

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

13.2 View a Record

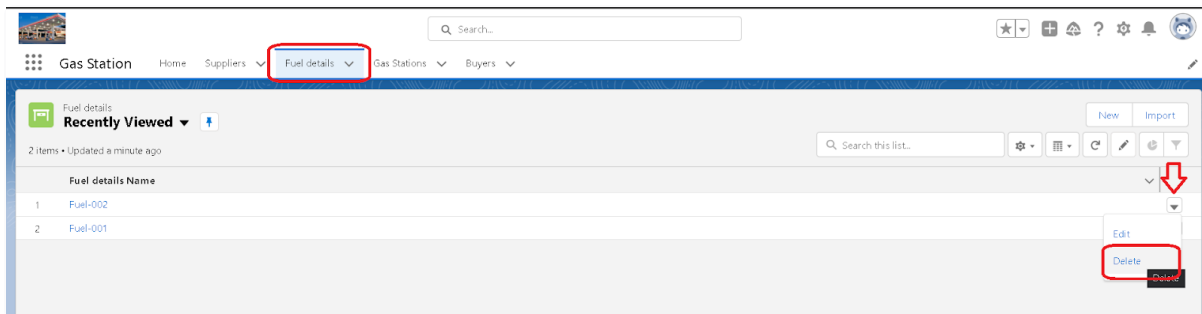
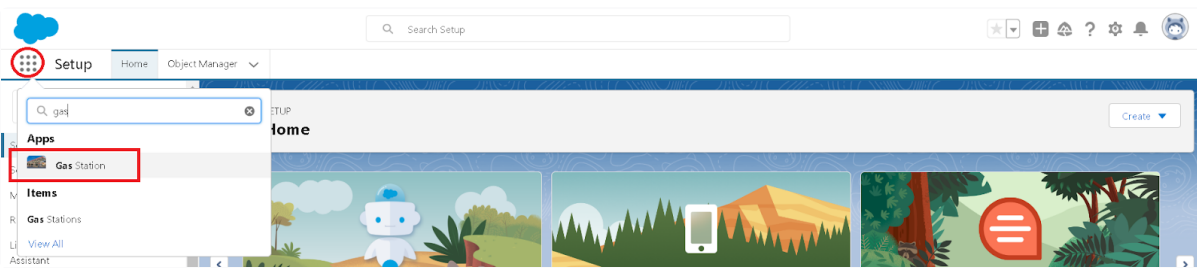
1. Click on the app launcher located at the left side of the screen.
2. Search for "Gas station" > click on it.
3. Click on the "fuel details tab".
4. Click on the records that are already created.



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

13.3 Delete a Record

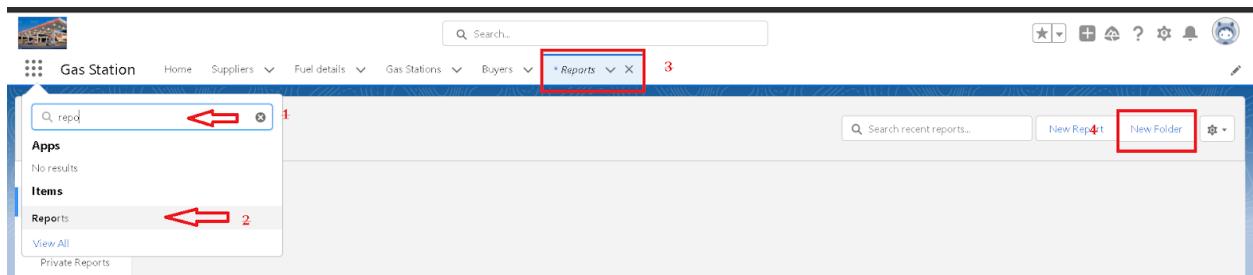
1. Click on the app launcher located at the left side of the screen.
2. Search for "Gas station" > click on it.
3. Click on the "fuel details tab".
4. Click on the Arrow at the right hand side on that Particular record.
5. Click delete and delete again.



14. Reports

14.1 Create a Report Folder

1. Click on the app launcher > search for reports.
2. Double click on the report > "reports tab" will be auto populated in the navigation bar.
3. Click on the report tab > click on a new folder.



- Folder label: Fuel Estimation
- Folder unique name will be auto populated.
- Click Save.

14.2 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 the Fuel estimation folder.
3. Click on share.
 - Share with: roles
 - name: manager (search for field)
 - Access: view
4. Click share > Click Done.

Gas Station Home Suppliers Fuel details Gas Stations Buyers Reports 1

Search...

Reports

All Folders 5 items

Search all folders... New Report New Folder

REPORTS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	Einstein Bot Reports	Automated Process	16/5/2023, 8:59 am	Automated Process	16/5/2023, 8:59 am
Created by Me	Einstein Bot Reports Summer '23	Automated Process	11/6/2023, 6:08 am	Automated Process	11/6/2023, 6:08 am
Private Reports	Einstein Bot Reports Summer '22	Automated Process	16/5/2023, 8:59 am	Automated Process	16/5/2023, 8:59 am
Public Reports	Einstein Bot Reports Winter '23	Automated Process	16/5/2023, 8:59 am	Automated Process	16/5/2023, 8:59 am
All Reports	Fuel Estimation	sunny 1	15/6/2023, 10:22 am	sunny 1	15/6/2023, 10:22 am

FOLDERS

All Folders 2

Created by Me

Shared with Me

FAVORITES

All Favorites

Favorite

Share 3

Rename

Delete

Share folder

These sharing settings apply to all subfolders in this folder.

Share With

Roles 1

Names

Search Roles...

Manger 2

Access

View 3

Share 4

Who Can Access

Search

sunny 1 Users

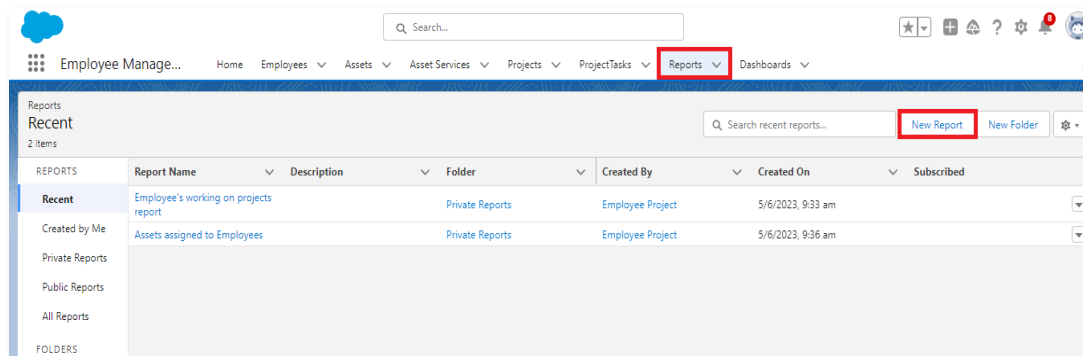
Manage

Done 5

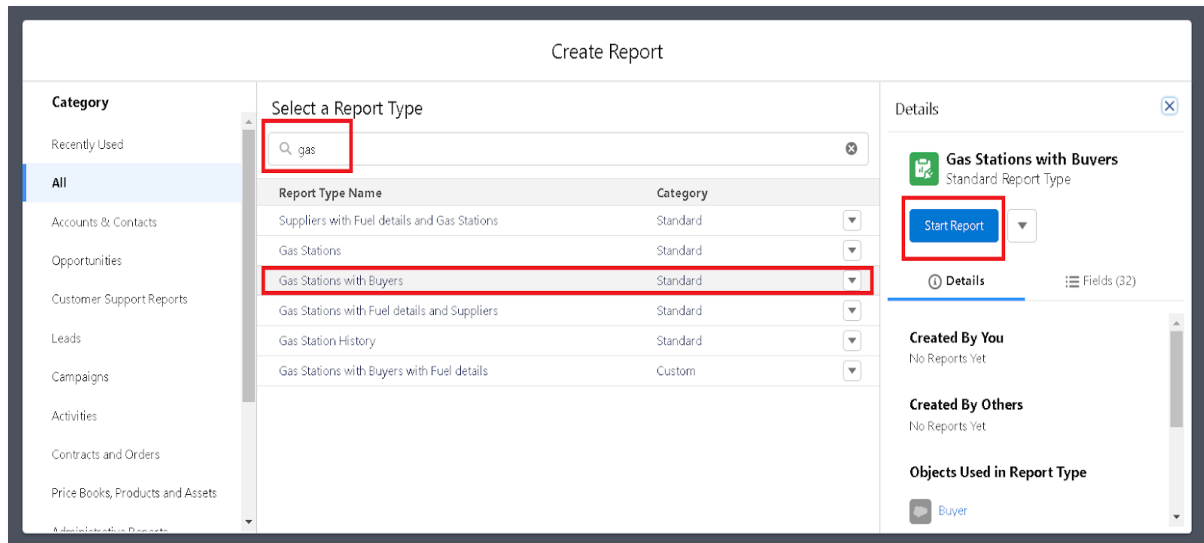
14.3 Create Report

Note : Before creating report, create latest “10” records in buyer object.

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 > click on start report



4. Their outline pane is opened already; select the fields that are mentioned below in the column section.
 1. Fuel filled in vehicle
 2. Amount paid
5. Remove the unnecessary fields.

6. Select the fields that are mentioned below in the GROUP ROWS section.

1. Fuel Available in bunk
2. Customer name

REPORT ▼
New Gas Stations with Buyers Report Gas Stations with Buyers

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Fields > Outline Filters

Groups

GROUP ROWS

Add group... Fuel Available in bunk

GROUP COLUMNS

Add group...

Columns

Add column... Customer name # Fuel filled in vehicle # Amount Paid

Fuel Available in bunk	Customer name	Fuel filled in vehicle	Amount Paid
2,718.00 (7)	sunny bunny	70	₹6,720.00
	bunny g	15	₹1,440.00
	upadhye shivam	70	₹6,720.00
	sandeep guja	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	₹2,19,072.00
Total (7)		2,282	₹2,19,072.00

Row Counts Detail Rows Subtotals Grand Total

Conditional Formatting

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

Add Conditional Formatting Rule

Cancel Apply

9. Change the apply conditional formatting to " sum of Amount paid ".

10. Mention the range form " 1000 to 5000 ".


11. Don't change the colours > click on Done.






12. Click apply.


viewing a limited number of records. Run the report to see everything.

Add Conditional Formatting Rule

Apply Conditional Formatting to ?

Sum of Amount Paid 


Range	Background Color	
<= 0 		X
> 0 to 5000 		X
> 5,000		X






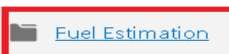
 Cancel Done


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

Select



All Folders > Fuel Estimation

 Search folders...

-  Einstein Bot Reports ▶
-  Einstein Bot Reports Summer '23 ▶
-  Einstein Bot Reports Summer '22 ▶
-  Einstein Bot Reports Winter '23 ▶
-  **Fuel Estimation** ▶ 



Nothing here yet
This folder has no subfolders.

 New Folder Cancel  Select Folder

ers Report **Gas Stations with Buyers** Add Chart Save & Run Save

Save Report

*Report Name
Amount range ← 1

Report Unique Name ⓘ
Amount_range_SNI ← 2


Report Description

Folder
Fuel Estimation 4

3 Select Folder

Cancel 5 Save

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

<div>  <div> Report: Gas Stations with Buyers Amount range </div> </div>				
Total Records	Total Fuel filled in vehicle	Total Amount Paid		
10	661	76,676.00		
<input type="checkbox"/> Fuel Available in bunk ↑ ▾	Customer Name ▾	Fuel filled in vehicle ▾	Amount Paid ▾	
<input type="checkbox"/> 79,339.00 (10)	Michael Brown	120	13,920.00	
	John Doe	70	8,120.00	
	Jane Smith	5	580.00	
	Bob Johnson	25	2,900.00	
	Alice Williams	15	1,740.00	
	Emily Jones	40	4,640.00	
	Sarah Davis	95	11,020.00	
	David Miller	255	29,580.00	
	Chris Garcia	30	3,480.00	
	Laura Martinez	6	696.00	
Subtotal		661	76,676.00	
Total (10)		661	76,676.00	

Row Counts ☒
Detail Rows ☒
Subtotals ☒
Grand Total ☒

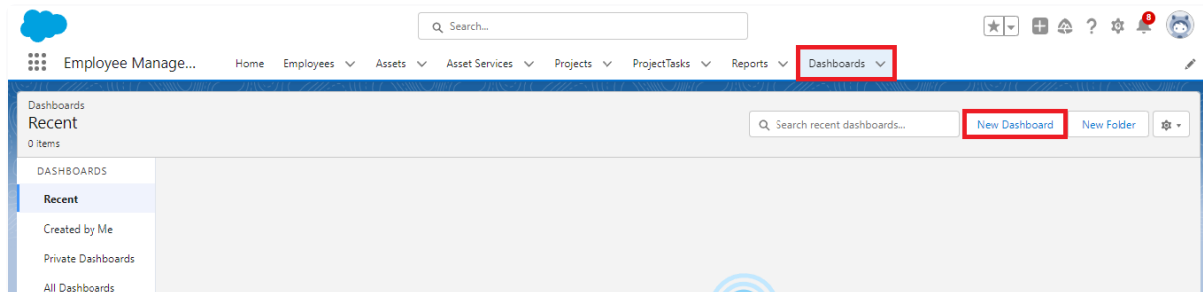
15. Dashboards

15.1 Create Dashboard Folder

1. Click on the app launcher > search for dashboard > click on it.
2. Click new folder
3. Give the folder label: " Amount estimation dashboard".
4. Folder unique name will be auto populated.
5. Click save.

15.2 Create Dashboard

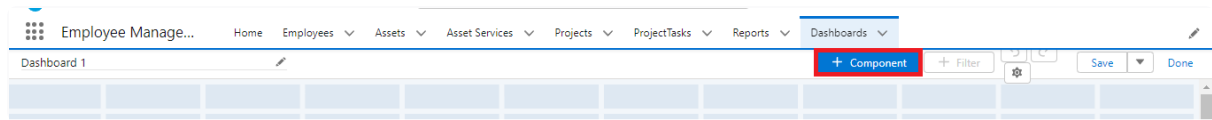
1. Go to the app > click on the Dashboards tabs.



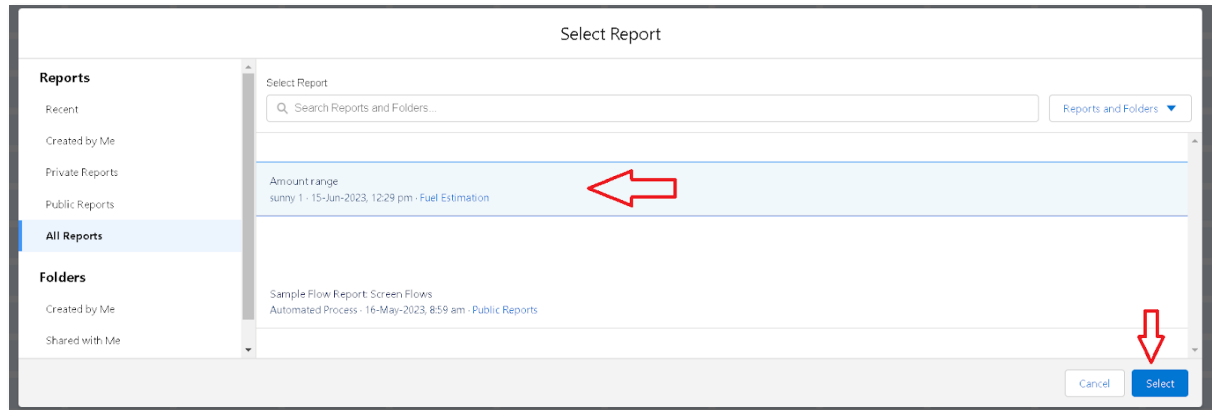
2. Give a Name "Estimation Amount" > select the folder that created > click on create.

A screenshot of the 'New Dashboard' form. The form has three main input fields: 'Name', 'Description', and 'Folder'. The 'Name' field contains 'Estimation amount'. The 'Folder' field contains 'Amount estimation dashboard'. There are 'Select Folder', 'Cancel', and 'Create' buttons at the bottom right. Red boxes highlight the 'Name' field, the 'Folder' field, the 'Select Folder' button, and the 'Create' button.

3. Select add component.

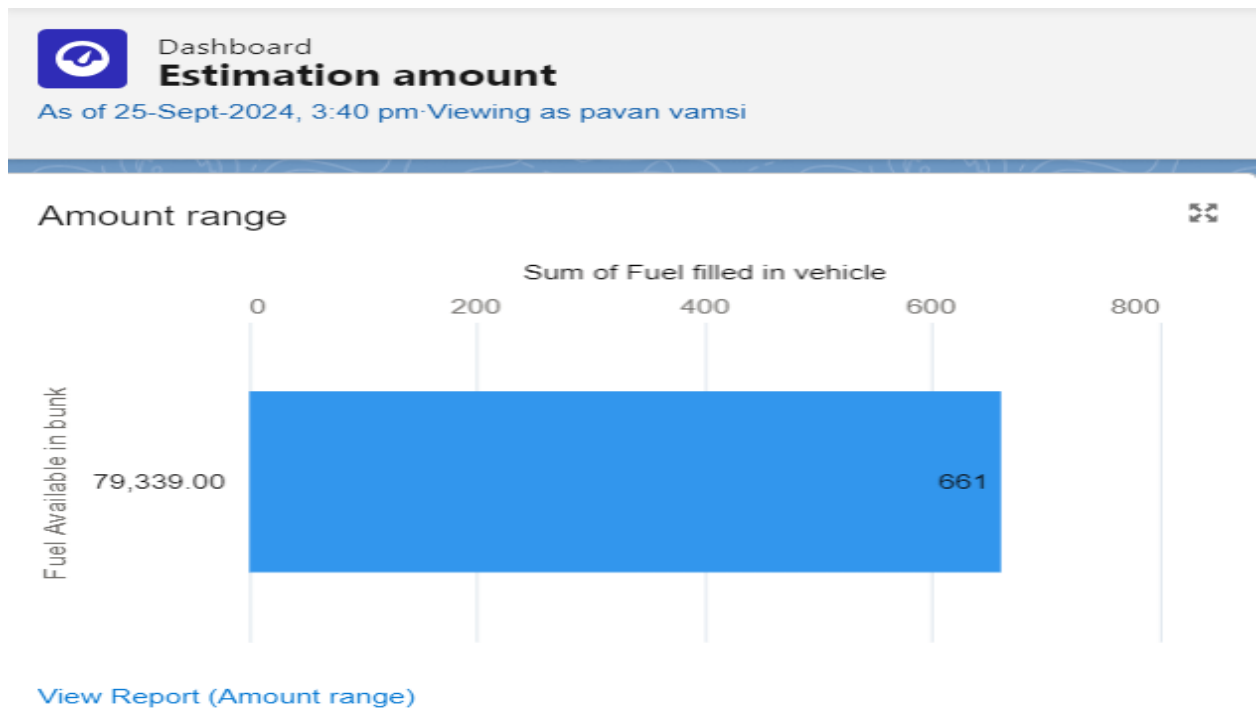


4. Select a Report and click on select.



5. Click Add > click Save > click Done.

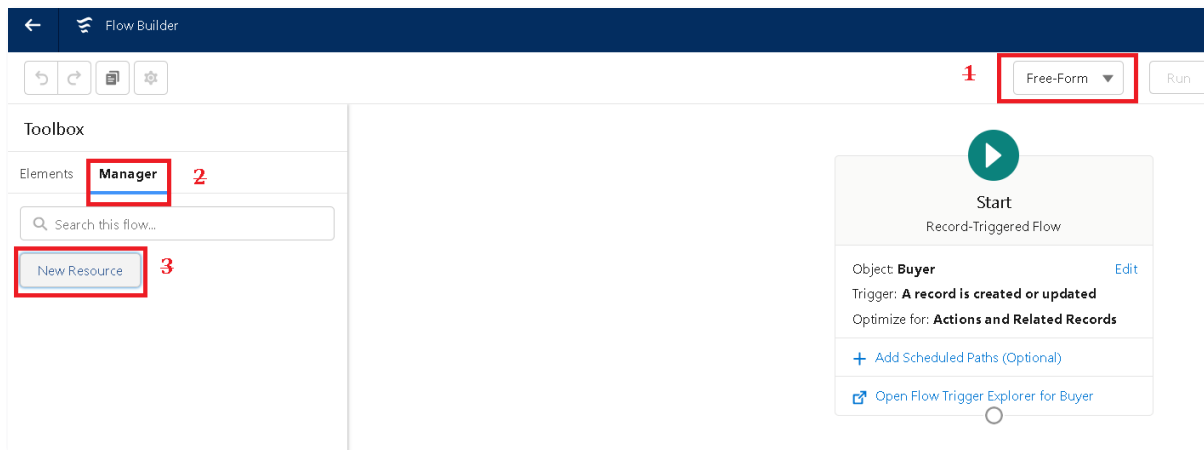
6. Preview is shown below.



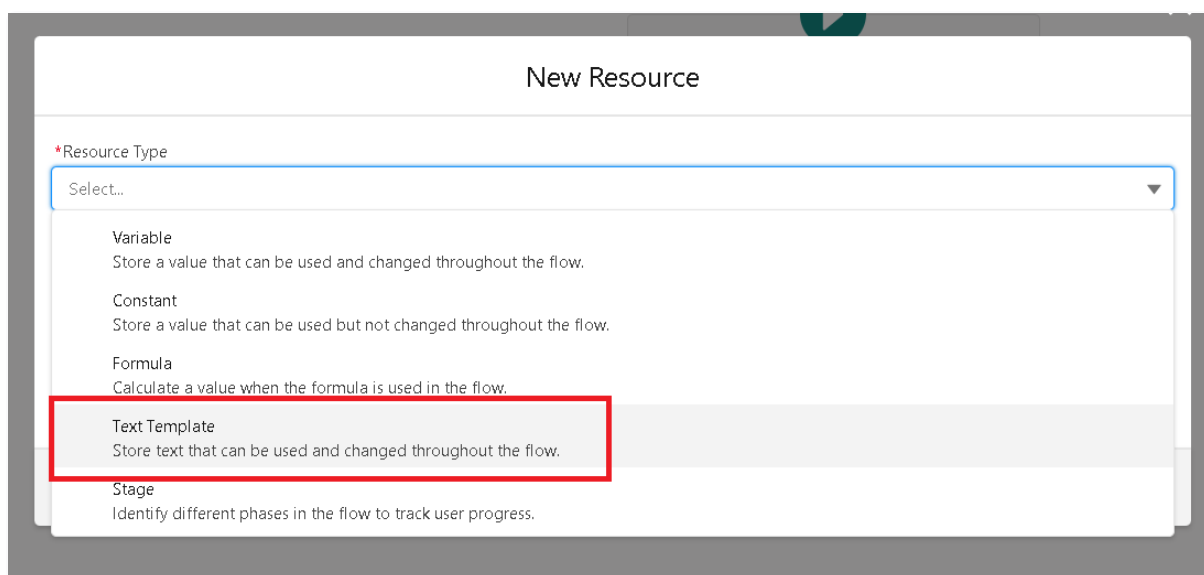
16. Flows

Create a Flow

1. Go to setup > type Flow in the quick find box > Click on the Flow > Select the New Flow.
2. Select the Record-triggered flow > Click on Create.
3. Object: "buyer" in the Drop down list.
4. Select the Trigger Flow when: "A record is Created or Updated".
5. Select the Optimize the flow for: "Actions and Related Records" > Click Done.
6. change the mode from "Auto-layout" to "free-form".
7. select the manager option in the toolbox > click New resource.



8. Select the resource type as text template.



9. API name: emailbody.

10. In the body field, paste the syntax that is given below.

Hello {!\$Record.Customer_name__c},

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

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. 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 " > click on it.

15. label name: notice

16. API name will be auto populated.

17. Enable the body to set input values for the selected action.

18. Select the text template that created.

New Action

Filter By

Category ▾

- All
- Users
- Commerce
- Work Plans
- Work Steps
- Appointments
- Messaging
- Price books
- Order Management
- Waitlists

Action

Send Email 1

Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.

*Label

notice1 2

*API Name

notice1

Description

Set Input Values for the Selected Action

A_a Body ⓘ

{!emailbody} 4

3 Include

A_a Email Template ID

☐ Don't include

Cancel

Done

19. Include recipient address list select the email form the record.

20. Include subject as " welcome to gas station".

21. Click done.

Edit Action

A_a Recipient Address List ⓘ

{!\$Record.Email_c}

A_a Email_c

A_a Email

A_a Related Record ID

Rich-Text-Formatted Body

A_a Sender Email Address

A_a Sender Type

A_a Subject ⓘ

Welcome to the Gas Station

Include

☐ Don't include

☐ Don't include

☐ Don't include

☐ Don't include

☐ Don't include

Include

Cancel

Done

22. Drag the path from the start to the action element.

23. Click on save > Give the Flow label; the Flow Api name will be auto-populated.

24. And click save, and click on activate.

Free-Form

Version 1: Last modified 2 months ago

Active

Run

Debug

View Tests

Deactivate

Save As

Save

Start

Record-Triggered Flow

Object: **Buyer**

Trigger: **A record is created or updated**

Optimize for: **Actions and Related Records**

+ Add Scheduled Paths (Optional)

Open Flow Trigger Explorer for Buyer

Run Immediately

Action

notice

Flow

Gas Station

Type

Record—Run After Save

Associated Record


Progress Status

Activated

Last Modified Date

29/07/2024, 9:59 am

Flow Owner

 pavan va...

Related

Details

Information

Flow Label

Gas Station

Description

Associated Record

Created By

[pavan vamsj](#), 29/07/2024, 9:59 am

Last Modified

[pavan vamsj](#), 29/07/2024, 9:59 am

Category

API Name

Gas_Station

Flow Type

Record-Triggered After Save Flow

Created Date

29/07/2024, 9:59 am

Last Modified Date

29/07/2024, 9:59 am

Subcategory

Thank You

