

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

by

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PROJECT ABSTRACT

This project focuses on developing a ****Salesforce-based CRM system**** to streamline and enhance the administrative operations of gas filling stations. The goal is to create a solution that simplifies day-to-day tasks such as inventory management, sales tracking, and customer relationship management. The CRM system will provide administrators with real-time data and insights into fuel stock levels, sales performance, and employee productivity. Additionally, it will include features like automated scheduling, mobile notifications, and reporting, allowing gas stations to operate more efficiently.

By integrating customer profiles and purchase histories, the CRM will also enable gas stations to offer personalized promotions and loyalty programs, improving customer satisfaction and retention. The solution will centralize all operational data, ensuring administrators can make informed decisions quickly. Ultimately, this **Salesforce CRM** will help gas stations reduce operational costs, optimize resource allocation, and deliver a better customer experience, while also driving profitability and long-term success.

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MILESTONE-1

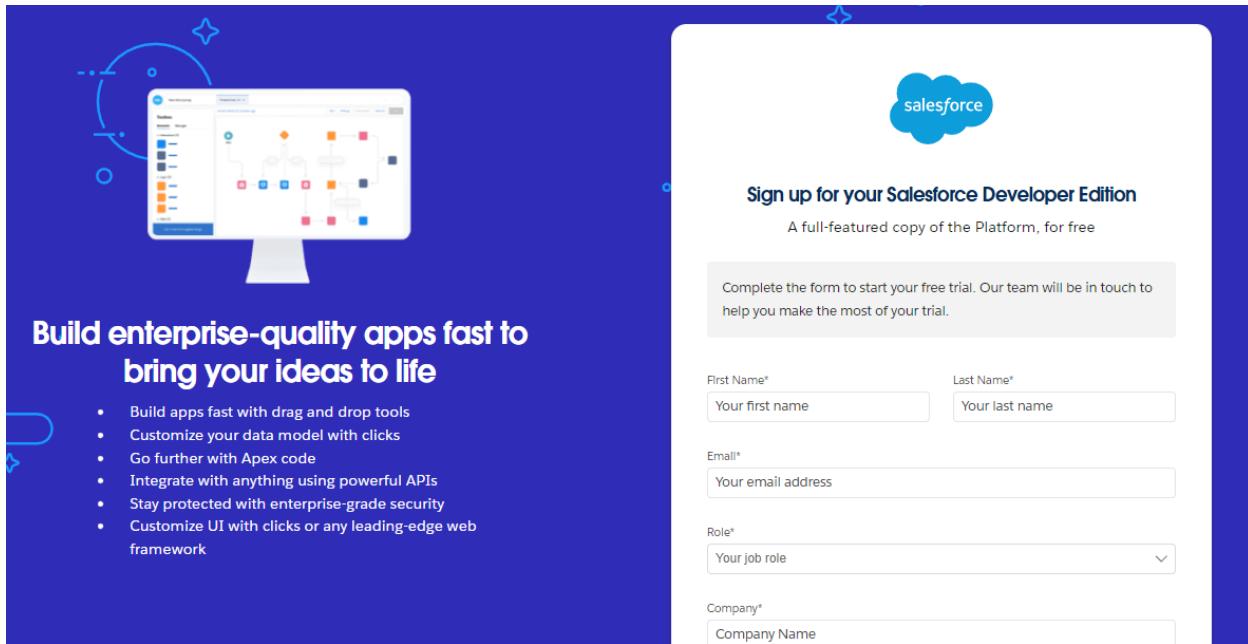
SALESFORCE

What is Salesforce?

Salesforce is a leading cloud-based Customer Relationship Management (CRM) platform that helps businesses manage their relationships and interactions with customers, streamline operations, and drive growth. It provides a wide range of tools and services for sales, marketing, customer service, analytics, and app development. With Salesforce, companies can track customer interactions, automate processes, analyze data, and create personalized experiences, all through a single, unified platform.



Steps to Create Developer Account:



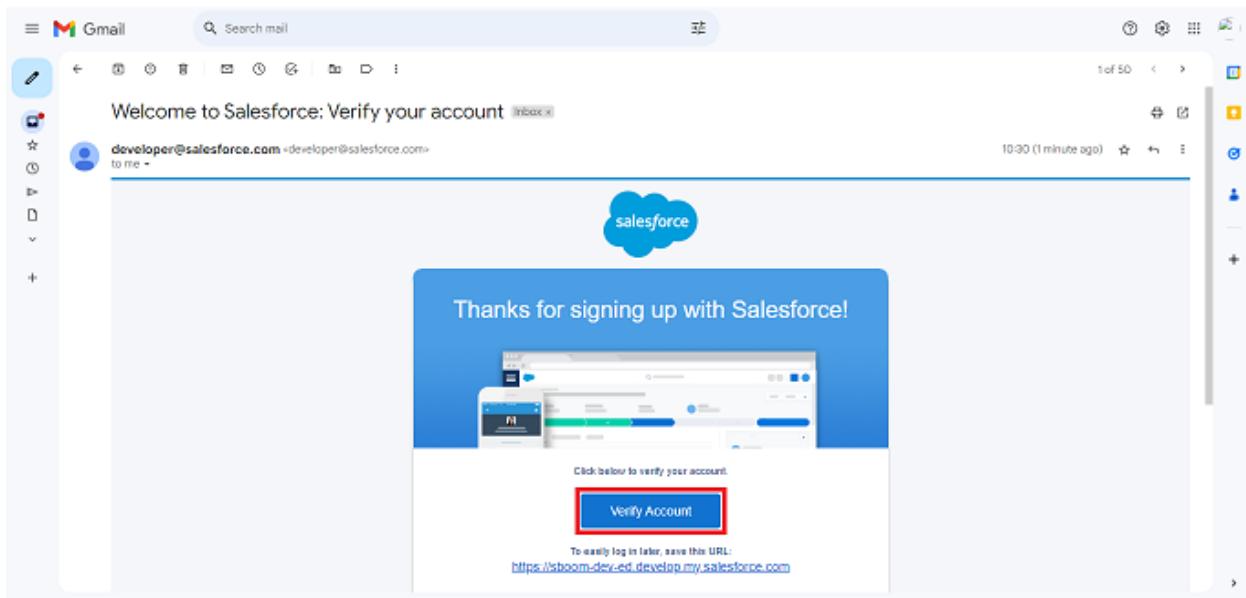
- Initially go to developer creation link, <https://developer.salesforce.com/signup>
- On the signup form, enter the following details:
 1. First Name
 2. Last Name
 3. Email
 4. Role: Developer
 5. Company: Respective College Name
 6. Country: India
 7. Postal Code: Pin Code of your respective area/location

NOTE:

Username : should be a combination of your name and company
This need not be an actual email id, you can give anything in the format :
username@organization.com
Click on sign me up after filling these.

Steps to Activate the Account:

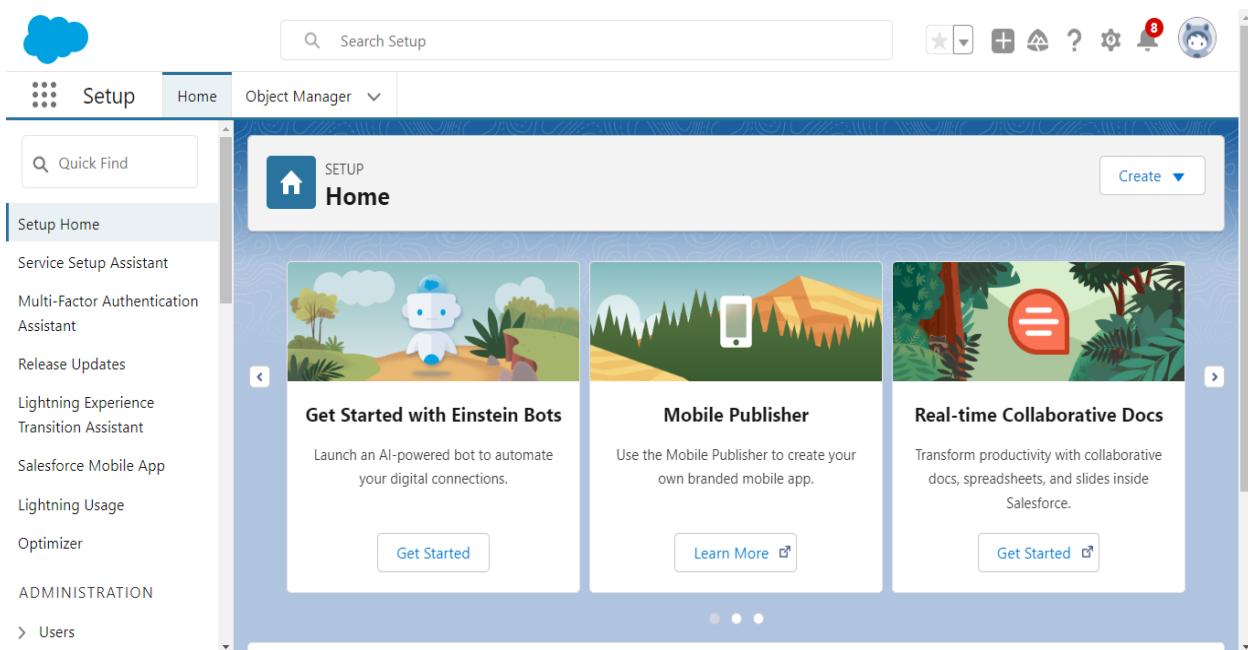
- Head over to your email inbox used during signup and locate the verification email. Click the link to activate your account. Allow 5-10 minutes for the email to appear.



- Click "Verify Account,"
- provide a new password, answer the security question, and confirm by selecting "Change Password."

A screenshot of a "Change Your Password" page. The title is "Change Your Password". It instructs the user to "Enter a new password for lead@sb.oom. Make sure to include at least:" followed by a list: "8 characters", "1 letter", and "1 number". A red box highlights the "New Password" field, which contains "..... Good". Another red box highlights the "Confirm New Password" field, which contains "..... Match". Below these are "Security Question" and "Answer" fields. The "Answer" field contains "In what city were you born? asdfghijkl". A red box highlights the "Change Password" button at the bottom.

- Once you're redirected to your Salesforce setup page, continue with the next steps.



MILESTONE-2

OBJECTS

what is an object?

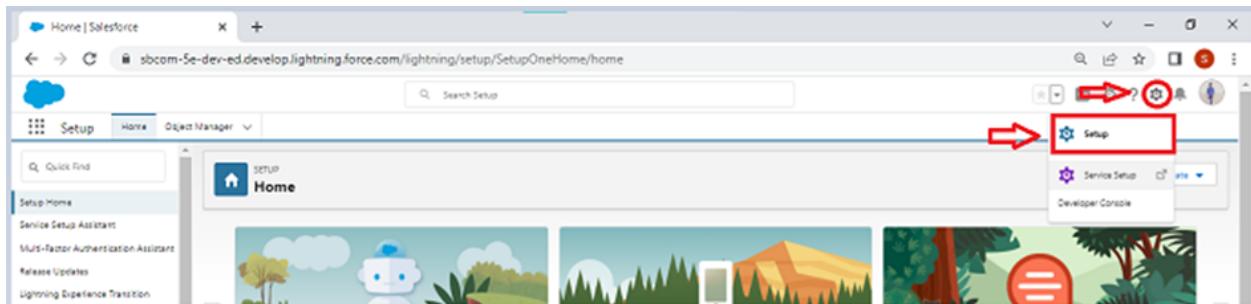
In Salesforce, an **object** is a database table that stores information. Objects are a fundamental part of Salesforce's data model, helping to organize and represent data in a structured way. Each object consists of **records** (rows) and **fields** (columns), similar to a spreadsheet.

Salesforce objects are of two types:

1. **Standard Objects:** Predefined objects that come built-in with Salesforce. These objects are part of the core Salesforce functionality and cover common business scenarios.
2. **Custom Objects:** User-created objects that extend Salesforce functionality to suit specific business needs. You can create custom objects to store unique data that Salesforce's standard objects do not cover.

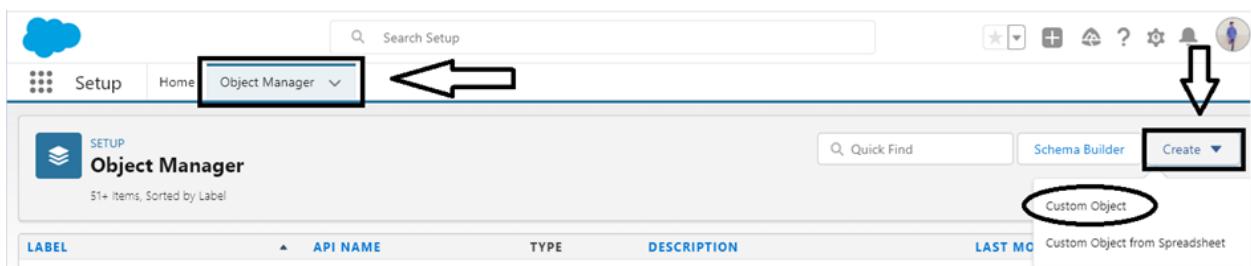
To Navigate to Setup page:

Click on gear icon ? click setup.



To create an object:

1. In the setup page, click Object Manager, select Create, and then click Custom Object.



2. On Custom object defining page:

3. Enter the label name, plural label name, click on Allow reports, Allow search.

The screenshot shows the 'New Custom Object' page in the Salesforce Setup. The 'Custom Object Definition Edit' section contains fields for 'Label' (Example: Account), 'Plural Label' (Example: Accounts), 'Object Name' (Example: Account), and 'Description'. Under 'Optional Features', the 'Allow Reports' checkbox is checked. In the 'Deployment Status' section, the 'Allow Search' checkbox is also checked. Arrows highlight the 'Plural Label' field, the 'Object Name' field, the 'Allow Reports' checkbox, and the 'Allow Search' checkbox.

4.click on save.

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 Object Manager interface. At the top, it says "SETUP > OBJECT MANAGER". Below that, the object name "Supplier" is displayed. On the left, there's a sidebar with various tabs like Details, Fields & Relationships, Page Layouts, etc. The "Details" tab is selected. In the main area, there are two sections: "Details" and "Advanced". The "Details" section contains fields for Description, API Name (Supplier__c), Singular Label (Supplier), and Plural Label (Suppliers). The "Advanced" section contains checkboxes for Enable Reports (checked), Track Activities, Track Field History (checked), Deployment Status (Deployed), and Help Settings. At the bottom right, there are "Edit" and "Delete" buttons.

Create Gas Station 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? Gas Station
2. Plural label name? Gas Stations
3. Enter Record Name Label and Format
 - Record Name ? Gas Station
 - Data Type ? Auto Number
 - Display Format ? Gas-{000}
 - Starting number ? 1

2. Click on Allow reports and Track Field History,
3. Allow search ? Save.

The screenshot shows the 'Object Manager' interface for creating a new custom object named 'Gas Station'. The left sidebar lists various configuration tabs: 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, and Scoping Rules. The main 'Details' tab is selected, showing the following configuration:

Setting	Value
Description	
API Name	Gas_Station__c
Custom	✓
Singular Label	Gas Station
Plural Label	Gas Stations
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the top right of the main area are 'Edit' and 'Delete' buttons.

Create Buyer and Fuel details Objects:

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

1. Use these display format for the Buyer

- label name ? Buyer
- Plural label name ? Buyers
- Display Format ? Buyer-{000}
- Starting number ? 1

2. Use these display format for the Fuel details

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

SETUP > OBJECT MANAGER
Buyer

Details	
Fields & Relationships	Description
Page Layouts	API Name Buyer_c Custom ✓ Singular Label Buyer
Lightning Record Pages	Plural Label Buyers
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	
Edit Delete	

SETUP > OBJECT MANAGER
Fuel details

Details	
Fields & Relationships	Description
Page Layouts	API Name Fuel_details_c Custom ✓ Singular Label Fuel details
Lightning Record Pages	Plural Label Fuel details
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	
Edit Delete	

MILESTONE-3

TABS

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

Types of Tabs:

1. Custom Tabs :

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

2. Web Tabs :

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

3. Visualforce Tabs :

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

4. Lightning Component Tabs :

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

5. Lightning Page Tabs :

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

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)

The screenshot shows the Salesforce Setup interface with the following highlights:

- Setup** button in the top left.
- Home** and **Customize** buttons in the top right.
- Search bar** containing "Tabs".
- Custom Tabs** section title.
- New** button in the top right of the table area.
- Table Headers**: Action, Label, Tab Style, Description.
- Table Data** (partial view):
 - Action: Edit | Del, Label: Accounts, Tab Style: Desk, Description: created to setup with student activity(junction object).
 - Action: Edit | Del, Label: Addresses, Tab Style: Anytime, Description: This tab is related to Hotel Reservation App.
 - Action: Edit | Del, Label: Classes, Tab Style: Classroom, Description: This tab is related to College Management System.
 - Action: Edit | Del, Label: Contacts, Tab Style: Joined, Description: This tab is related to Hotel Reservation App.
 - Action: Edit | Del, Label: Events, Tab Style: Anytime, Description: This tab is related to Hotel Reservation App.
 - Action: Edit | Del, Label: Leads, Tab Style: Phone, Description: This tab is related to Hotel Reservation App.
 - Action: Edit | Del, Label: Opportunities, Tab Style: Classroom, Description: This tab is related to Hotel Reservation App.
 - Action: Edit | Del, Label: Products, Tab Style: Computer, Description: This tab is related to Hotel Reservation App.
 - Action: Edit | Del, Label: Receipts, Tab Style: Desk, Description: This tab is related to Hotel Reservation App.
 - Action: Edit | Del, Label: Reasons, Tab Style: Highway Sign, Description: This tab is related to Hotel Reservation App.
 - Action: Edit | Del, Label: Reasons, Tab Style: Highway Sign, Description: This tab is related to Hotel Reservation App.
 - Action: Edit | Del, Label: Reasons, Tab Style: Anytime, Description: This tab is related to Hotel Reservation App.
 - Action: Edit | Del, Label: Reasons, Tab Style: Anytime, Description: This tab is related to Hotel Reservation App.

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.

The screenshot shows the "Step 1. Enter the Details" form with the following fields and highlights:

- Step 1 of 3** at the top right.
- Description**: 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** (highlighted with a red box).
- Tab Style**: **None** (highlighted with a red box).
- (Optional) Choose a Home Page Custom Link**: **Supplier** (highlighted with a red box).
- Description**: Enter a short description.
- Next** button at the bottom right with a red arrow pointing to it.

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**

Creating Remaining Tabs:

1. Now create the Tabs for the remaining Objects, they are " Gas station, Buyer, Fuel details".
2. Follow the same steps as mentioned in Activity -1 .

The screenshot shows the Salesforce Setup interface under the 'Tabs' section. It displays three sections: 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. The 'Custom Object Tabs' section lists four tabs: 'Buyers' (labeled 'Laptop'), 'Fuel details' (labeled 'Laptop'), 'Gas Stations' (labeled 'Laptop'), and 'suppliers' (labeled 'Laptop'). The 'Web Tabs' and 'Visualforce Tabs' sections are currently empty.

Action	Label	Tab Style	Description
Edit Del	Buyers	Laptop	
Edit Del	Fuel details	Laptop	
Edit Del	Gas Stations	Laptop	
Edit Del	suppliers	Laptop	

MILESTONE-4

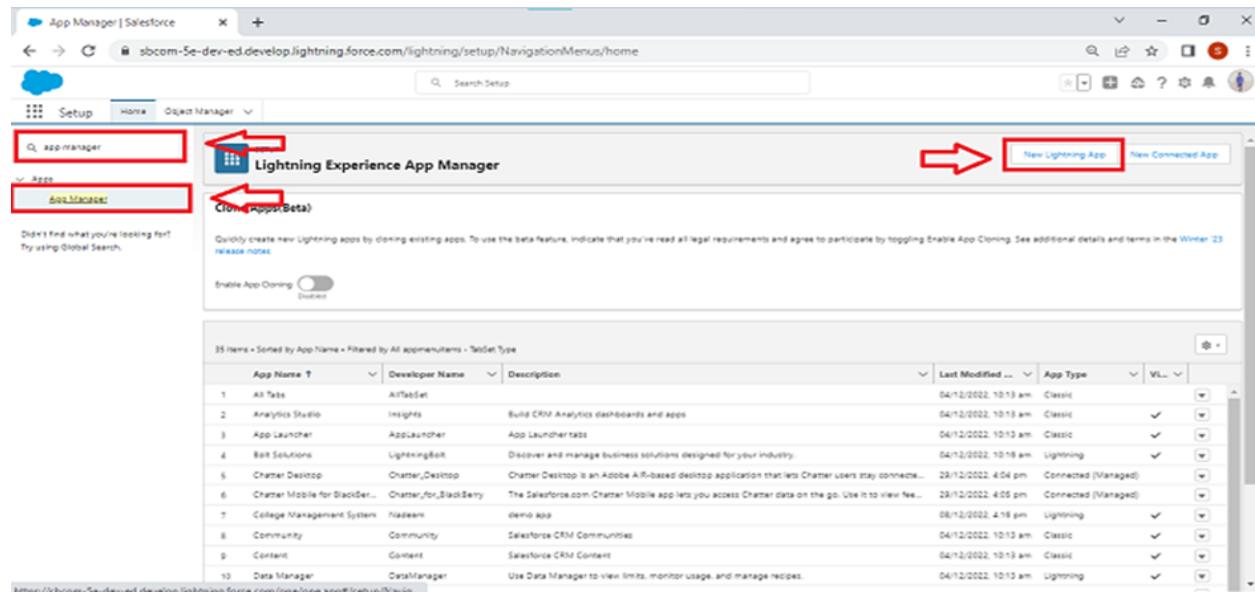
THE LIGHTNING APP

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.

Create a Lightning App:

To create a lightning app page:

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



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

New Lightning App

App Details & Branding

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

App Details

App Name (Required)

Developer Name

Description

App Branding

Image Primary Color Hex Value

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

App Launcher Preview

Next (Required)

3. To Add Navigation Items:

New Lightning App

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Type to filter list...

- Accounts
- Activities
- Alert Settings
- All Sites
- Alternative Payment Methods
- App Launcher
- Appointment Invitations

Selected Items

No items selected

Back (Required) Next (Required)

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

4. To Add User Profiles:

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Type to filter list...

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website
- Authenticated Website
- Contract Manager
- Cross Org Data Proxy User
- Custom: Sales Profile

Selected Profiles

No Profiles selected

Back (Required) Save & Finish (Required)

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

MILESTONE-5

FIELDS

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields :

- 1. Standard Fields**
- 2. Custom Fields**

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

- ? Created By**
- ? Owner**
- ? Last Modified**
- ? Field Made During object Creation**

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

Creating Junction Object:

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

Creating junction object as Fuel details with Supplier & Gas station

To create junction object :

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

The screenshot shows the Salesforce Object Manager interface. At the top, there is a search bar and a toolbar with various icons. Below the toolbar, the title 'Object Manager' is displayed, followed by a sub-header '2 items, Sorted by Label'. A red box highlights the 'Label' column for the 'Fuel details' object, and another red box highlights the 'API Name' column for the same object. The table lists two objects: 'Student' and 'Fuel details'. The 'Fuel details' object has a description 'created for the purpose of junction object'.

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

The screenshot shows the 'Fields & Relationships' section for the 'Supplier' object. On the left, there is a sidebar with various options like Details, Page Layouts, Lightning Record Pages, etc. A red box highlights the 'Fields & Relationships' option. The main area shows a table titled 'Fields & Relationships' with 5 items, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. A red box highlights the 'New' button at the top right of the table. The table data includes:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Sum of Fuel supplied	Sum_of_Fuel_supplied__c	Roll-Up Summary (SUM Fuel details)		
supplier Name	Name	Name		

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

Specify the type of information that the custom field will contain.

Data Type

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary (1) A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Master-Detail Relationship (1) Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
 The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
- External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

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

Buyer New Relationship

Step 2. Choose the related object

Select the other object to which this object is related

Related To:

Step 2 of 6

Help for this Page (1)

Previous Next Cancel

Previous Next Cancel

5. Give Field Label as “Supplier Name” and click Next.

6. Next ? Next ? Save & New.

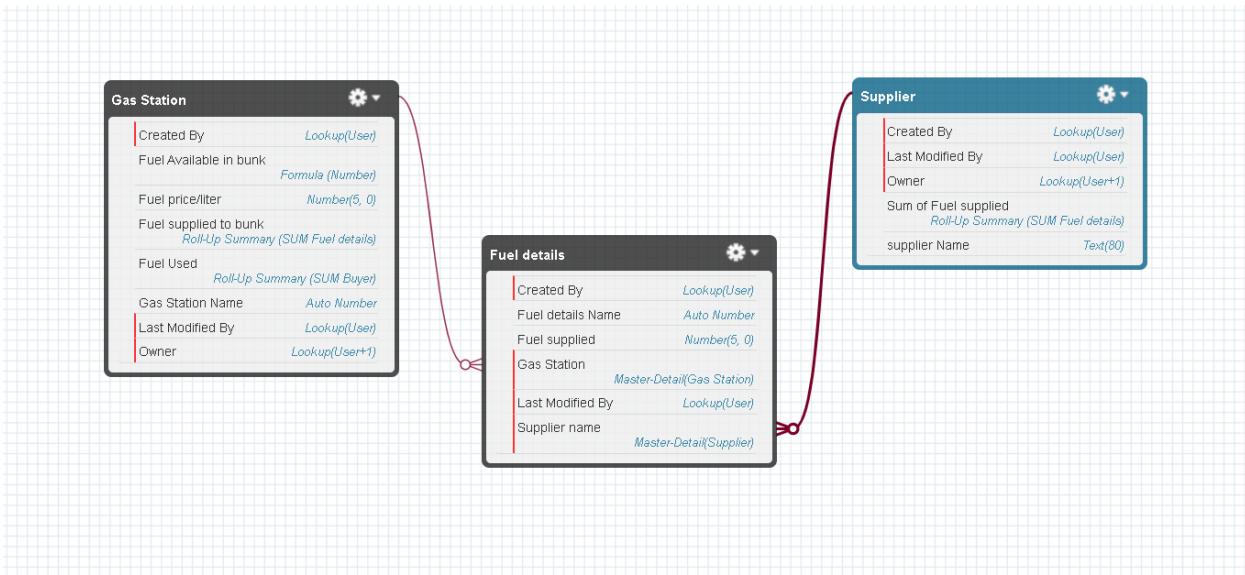
7. Follow the same steps from 1 to 3.

8. Select the related object “Gas station” and click Next.

9. Give Field Label as “Gas Station” and click Next.

10. Next ? Next ? Save.

11. Below their is an overview of junction object for better understanding.



Creating a Master-Detail Relationship

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

Creating Master-Detail Relationship between Buyer & Gas Station Object

To Create a Master-Detail relationship

1. Go to the **setup** page ? click on **object manager** ? From drop down click edit for **Buyer object**.
2. Click on **fields & relationship** ? click on New.
3. Select “**Master-Detail relationship**” as data type and click Next.
4. Select the related object “ **Gas station** ”.
5. Give Field Label as “**Gas Station name**” and click Next.
6. Next ? Next ? Save.

Creating the number field in Fuel details object

Creating the number field in Fuel details object

1. Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as “Number” and click Next.
3. Given the Field Label as “Fuel Supplied” and length as “5”.

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

Creating the Roll-up Summary

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

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

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

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

FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Name	Auto Number		
Age	Number(2,0)		
Created By	Lookup(User)		
Date of Birth	Date		
Date of Joining	Datetime		
Gender	Picklist		
Last Modified By	Lookup(User)		
Name	Text(20)		
Owner	Lookup(User Group)		
Phone No	Phone		
Record Type	Record Type		
Team	Lookup		

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

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or “detail”) and another object (the parent, or “master”) where:

- The relationship field is required on all detail records.

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

Step 2. Enter the details Step 2 of 5

Field Label

Field Name

Description

Help Text

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

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

5. Select the summarized object as “ **Fuel details** ”.
6. Select the Rollup type as “ **sum** ”.
7. Select the field to aggregate as “ **Fuel supplied** ”, and click Next ? Next ? Save.

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize
Master Object
Summarized Object

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

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

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

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

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

Creating Formula Field in Gas Station Object

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

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

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

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

Step 2. Choose output type

Step 2 of 5

Previous **Next** Cancel

Field Label Field Name

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

Formula Return Type

None Selected Select one of the data types below.

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

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

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

Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `Meeting = NOW() + 1`

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

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

5. Under Advanced Formula write down the formula and click “**Check Syntax**” and Save.
6. Insert field formula should be : **Fuel_supplied_to_bunk_c - Fuel_Used_c**

Enter your formula and click **Check Syntax** to check for errors. Click the Advanced formula subtab to use additional fields, operators, and functions.

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

Simple Formula Advanced Formula

Insert Field Insert Operator [\(i\)](#)

FuelAvailableInBunk(Number) = **Fuel_supplied_to_bunk_c - Fuel_Used_c**

Functions

-- All Function Categories
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

7. Creating the Formula field in Buyer Object

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

8. Go to setup ? click on Object Manager ? type object name(Buyer) in search bar ? click on the object.
9. Click on fields & relationship ? click on New.
10. Select Data type as “**Formula**” and click Next.
11. Give Field Label and Field Name as “**Customer Name**” and select formula return type as “**TEXT**” and click next.
12. Insert field formula should be : **First_Name_c + ' ' + Last_Name_c**
13. click “**Check Syntax**” and Save.

Creating Cross Object Formula Field in Buyer Object

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

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

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

Step 2. Choose output type Step 2 of 5

Field Label Field Name

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: `11am = NOW() + 4h`

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

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

5. Insert fields formula should be :

Fuel_filled_in_vehicle_c * Gas_Station_name_r.Fuel_price_liter_c

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

The screenshot shows the "Advanced Formula" tab selected in the formula editor. The formula entered is: `Amount_Paid_(Currency) = Fuel_filled_in_vehicle__c * Gas_Station_name__r.Fuel_price_liter__c`. A red box highlights this formula. To the right, a sidebar lists various functions like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, with "Insert Selected Function" at the bottom.

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.

The screenshot shows the "Step 2. Enter the details" screen. The "Field Label" is set to "Vehicle type". Under "Values", the "Enter values, with each value separated by a new line" option is selected, and a red box highlights the list of vehicle types: Two Wheeler, Three Wheeler, Four Wheeler, Six Wheeler, Eight Wheeler, Others. An arrow points to the "Next" button at the top right.

6. Click Next.
7. Next ? Next ? Save & New.
8. Repeat the process 1 and 2 steps .
9. Enter Field Label as “Mode of payment”, under values select “Enter values, with each value separated by a new line” and enter values as shown below.
10. The values are : credit card, debit card, net banking, upi, cash.
11. Click Next.
12. Next ? Next ? Save & New.

Creating the validation rule

Creating the validation rule for phone number field in Buyer object

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

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

The screenshot shows the Salesforce Object Manager interface for the 'Buyer' object. In the sidebar, the 'Validation Rules' tab is selected. The main area displays a table titled 'Validation Rules' with one item listed:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
phone	Phone Number	incorrect data	✓	sunny 1, 12/06/2023, 12:00 pm

3. Enter the Rule name as "**Phone**".
4. Insert the Error Condition Formula as :-

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

The screenshot shows the 'Validation Rule Edit' screen. The 'Rule Name' field is set to 'phone'. The 'Error Condition Formula' field contains the formula `NOT(REGEX(Phone_Number__c , "[6-9]{1}[0-9]{9}"))`. This formula is highlighted with a red box. To the right, a 'Functions' dropdown menu is open, showing various functions like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc., with 'ABS(number)' selected. A 'Check Syntax' button at the bottom left shows 'No errors found'.

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

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is **true**

Error Message incorrect data

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

Error Location Top of Page Field **Phone Number** Phone Number

Save Save & New Cancel

Creating Remaining Fields in Objects

S.NO	Object Name	Fields										
1	Fuel Details	<table border="1"> <thead> <tr> <th>Field Name</th><th>Data Type</th></tr> </thead> <tbody> <tr> <td>Field Supplied</td><td>Number</td></tr> <tr> <td>Supplier name</td><td>Master details</td></tr> <tr> <td>Gas station</td><td>Master details</td></tr> </tbody> </table>	Field Name	Data Type	Field Supplied	Number	Supplier name	Master details	Gas station	Master details		
Field Name	Data Type											
Field Supplied	Number											
Supplier name	Master details											
Gas station	Master details											
2	Supplier	<table border="1"> <tbody> <tr> <td>Sum of fuel supplied</td><td>Rollup summary (Fuel detail object)</td></tr> </tbody> </table>	Sum of fuel supplied	Rollup summary (Fuel detail object)								
Sum of fuel supplied	Rollup summary (Fuel detail object)											
3	Gas Station	<table border="1"> <tbody> <tr> <td>Fuel Supplied to bunk</td><td>Rollup Summary (Fuel detail object)</td></tr> <tr> <td>Fuel Price/Litre</td><td>Number (length=5)</td></tr> <tr> <td>Fuel used</td><td>Rollup summary (Buyer object)</td></tr> <tr> <td>Fuel available in bunk</td><td>Formula</td></tr> </tbody> </table>	Fuel Supplied to bunk	Rollup Summary (Fuel detail object)	Fuel Price/Litre	Number (length=5)	Fuel used	Rollup summary (Buyer object)	Fuel available in bunk	Formula		
Fuel Supplied to bunk	Rollup Summary (Fuel detail object)											
Fuel Price/Litre	Number (length=5)											
Fuel used	Rollup summary (Buyer object)											
Fuel available in bunk	Formula											
4	BUyer	<table border="1"> <tbody> <tr> <td>First name</td><td>Text</td></tr> <tr> <td>Last name</td><td>Text</td></tr> <tr> <td>Customer name</td><td>Formula</td></tr> <tr> <td>Phone number</td><td>phone</td></tr> <tr> <td>email</td><td>email</td></tr> </tbody> </table>	First name	Text	Last name	Text	Customer name	Formula	Phone number	phone	email	email
First name	Text											
Last name	Text											
Customer name	Formula											
Phone number	phone											
email	email											

Fuel filled in vehicle	Number (length=5)
Vehicle type	picklist values <ul style="list-style-type: none"> • Two wheeler • Three wheeler • Four wheeler • Six wheeler • eight wheeler • others
Mode of payment	picklist values <ul style="list-style-type: none"> • Credit card • Debit card • Net banking • UPI • cash
Amount paid	Formula

MILESTONE-6

PAGE LAYOUTS

Page layouts

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

Creating the page layout

To Create a Page layout:

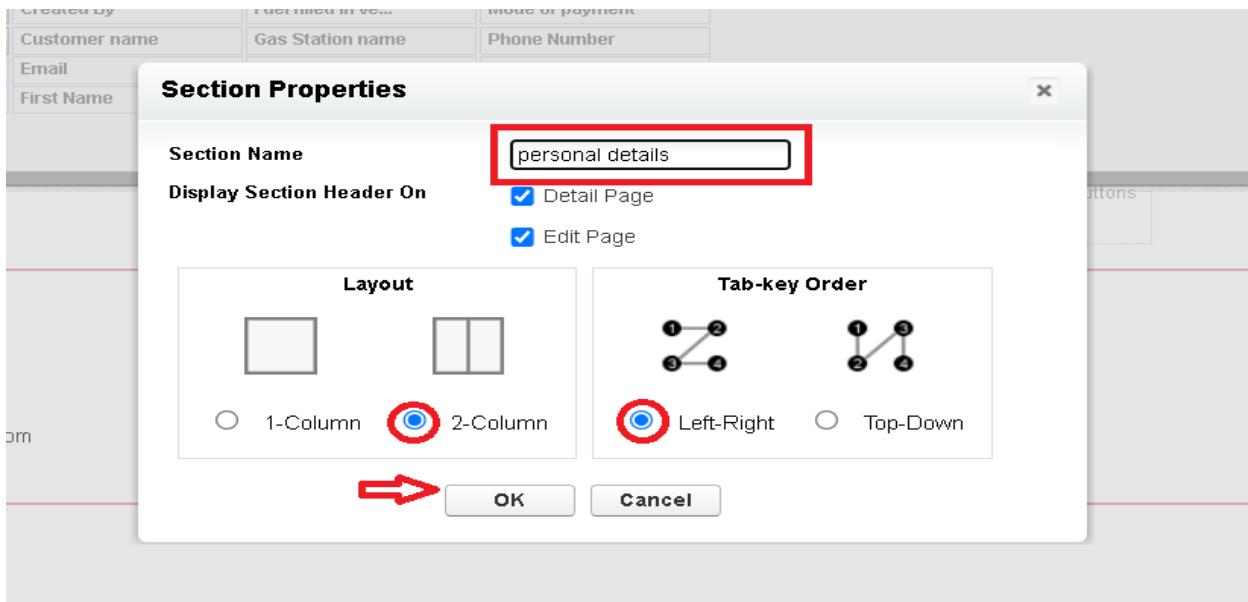
1. Go to Setup ? Click on Object Manager ? Search for the object (Buyer) ? From drop down select the object and click on it.
2. Click on Page layout ? Click on New

The screenshot shows the Salesforce Object Manager for the 'Buyer' object. The 'Page Layouts' tab is selected. A red arrow points to the 'Customer Layout' entry in the list. Another red arrow points to the 'New' button in the top right corner of the page layout list area.

3. Select the existing page layout, and give the page layout name as "**customer layout**", and click save.

The screenshot shows the 'Create New Page Layout' dialog box. It includes a note about cloning layouts and a dropdown for 'Existing Page Layout' set to 'custom page'. The 'Page Layout Name' field contains 'customer layout', which is highlighted with a red box. A red arrow points to the 'Save' button at the bottom.

4. Drag and drop the section field to Buyer details and create the section.
5. Enter the section name as "**Personal details**", ? click Ok.



6. Now drag the fields to this section that 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 vehicle, vehicle type.

9. Another section is “ **Recepit details** ” , and drag the fields that are

- Mode of payment , Amount paid.

10. Then , Click save.

Section	Created By	Fuel filled in ve...	Mode of payment
Customer name	Gas Station name	Phone Number	
Amount Paid	Email	Last Modified By	Vehicle type
Buyer number	First Name	Last Name	

MILESTONE-7

PROFILES

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:

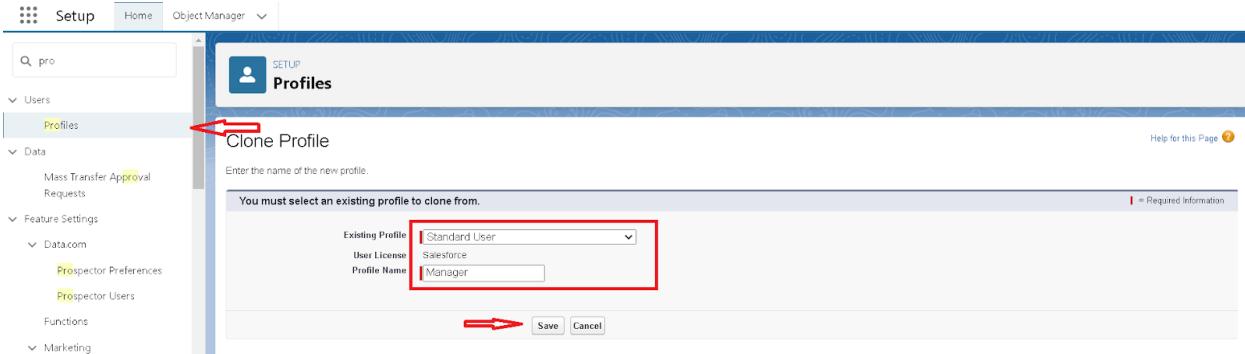
Custom ones defined by us.

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

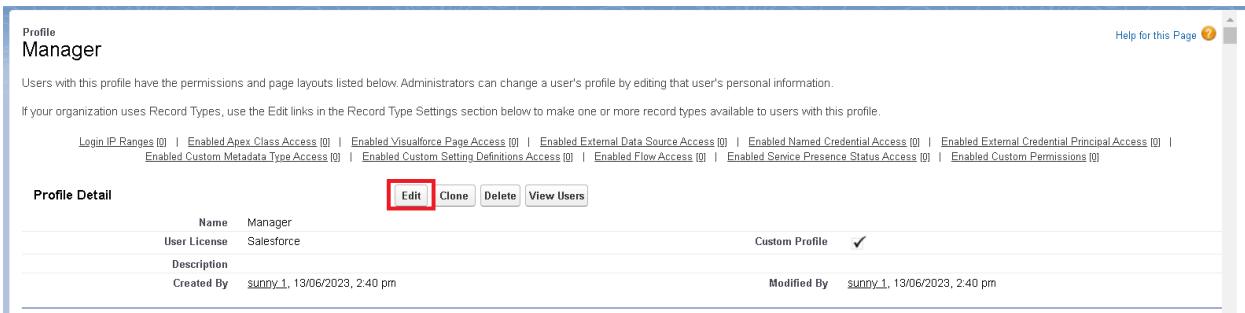
Manager Profile

To create a new profile:

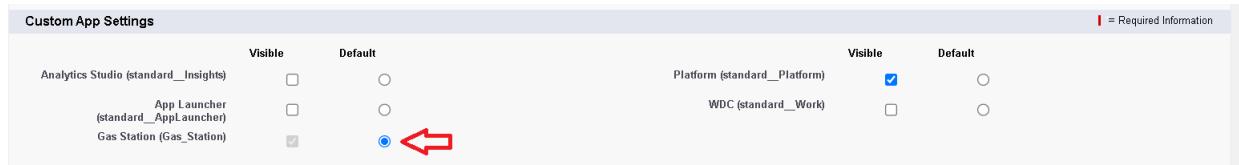
1. Go to setup ? type profiles in quick find box ? click on profiles ? clone the desired profile (Standard User) ? enter profile name (Manager) ? Save.



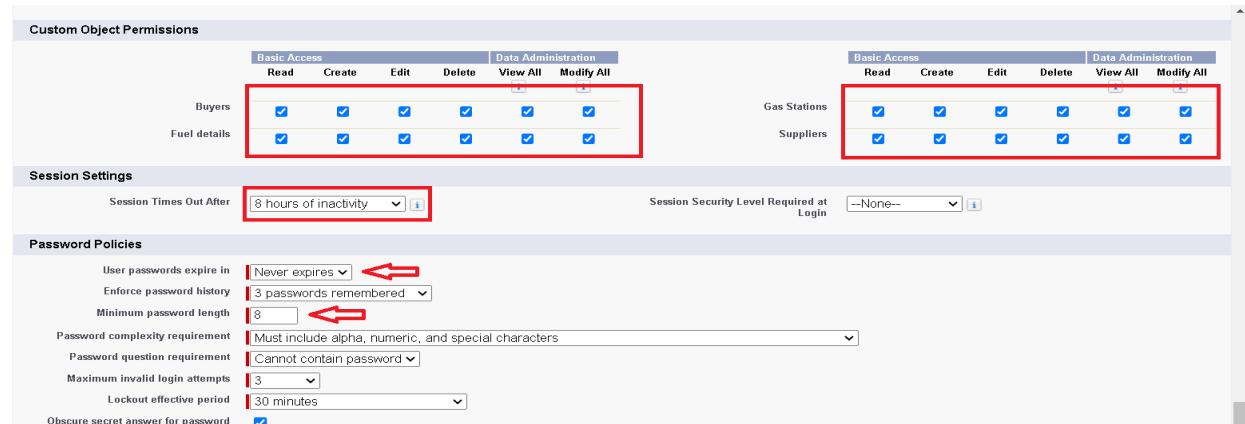
2. While still on the profile page, then click Edit.



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



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



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

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"/>	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Session Settings										
Gas Stations	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
Suppliers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. And click save.

sales person Profile

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

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

5. And click save.

MILESTONE-8

Role & Role Hierarchy

Role & Role Hierarchy

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

Creating Manager Role

Creating Manager Role:

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

The screenshot shows the Salesforce Setup interface. The left sidebar has a 'Roles' link highlighted with a red box. The main content area is titled 'Understanding Roles' and displays a 'Sample Role Hierarchy'. The hierarchy includes 'Executive Staff' at the top, followed by 'CEO', 'President', 'CFO', and 'VP_Sales'. Below them are 'Western Sales Director', 'Eastern Sales Director', and 'International Sales Director', each with their own team members. Arrows point from the higher-level roles to the lower-level ones. A legend on the right explains the icons: a person icon for users, a gear icon for feature settings, and a document icon for sales cases. At the bottom right of the content area is a 'Set Up Roles' button.

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

The screenshot shows the 'Your Organization's Role Hierarchy' page. The top left has a 'Collapse All' and 'Expand All' button, with 'Expand All' highlighted with a red box. The main area shows a hierarchical list of roles under 'Nick Enterprises': 'CFO', 'HR', 'Manager', 'On Site Emp', 'Remote Emp', and 'SVP'. Under 'Manager', there is an 'Add Role' link highlighted with a red box. Other links like 'Edit', 'Del', and 'Assign' are also visible next to the role names.

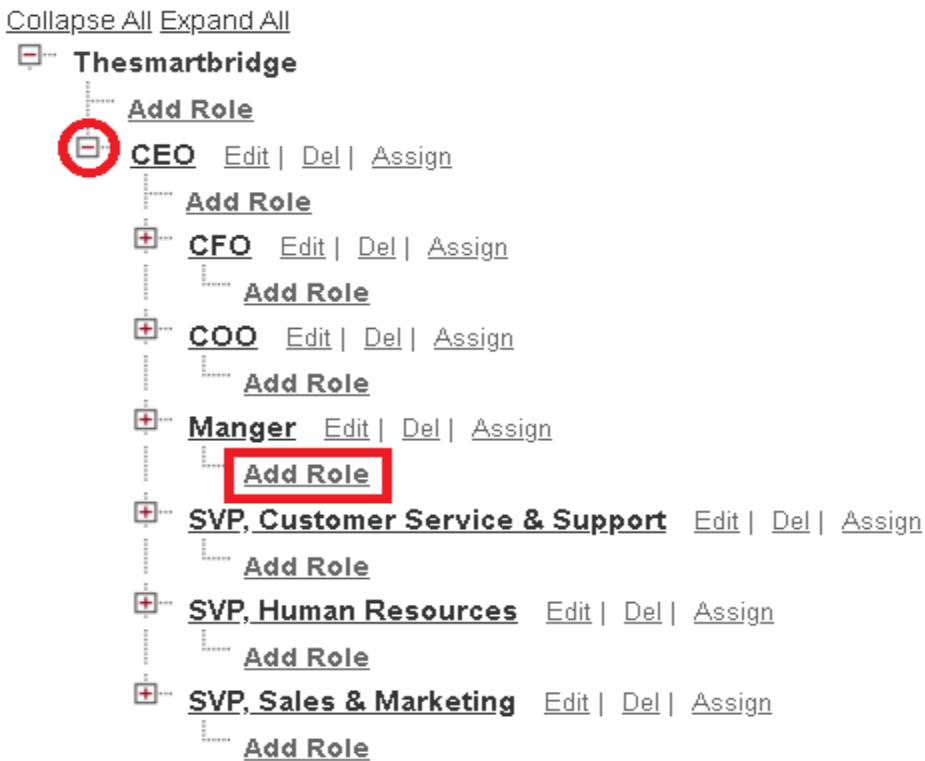
3. Give Label as “**Manager**” and Role name gets auto populated. Then click on Save

The screenshot shows the 'Role Edit' interface. At the top, there's a 'Label' input field containing 'Manger' with a red arrow pointing to it. Below it is a 'Role Name' input field also containing 'Manger'. Underneath these are two dropdown menus: 'This role reports to' (set to 'CEO') and 'Role Name as displayed on reports' (empty). At the bottom right, there are three buttons: 'Save' (highlighted with a red arrow), 'Save & New', and 'Cancel'.

Creating another roles

Creating another two roles under manager

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



3. Give Label as “**sales executive**” and Role name gets auto populated. Then click on Save.
4. Repeat the same steps,another role.
5. Click plus on CEO role, and click plus on manager, and click add role under sales executive

Your Organization's Role Hierarchy

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



The smartbridge

[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](#)



Sales executive [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](#)

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

Save

Role Edit
New Role

Help for this Page

Role Edit

Label:	Sales person
Role Name:	Sales_person
This role reports to:	Sales executive
Role Name as displayed on reports:	<input type="text"/>

[Save](#) [Save & New](#) [Cancel](#)

MILESTONE-9

Users

Users

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

Create User

1. Go to setup ? type users in quick find box ? select users ? click New user.
2. Fill in the fields

1. First Name : Niklaus
2. Last Name : Mikaelson
3. Alias : Give a Alias Name
4. Email id : Give your Personal Email id
5. Username : Username should be in this form: **text@text.text**
6. Nick Name : Give a Nickname
7. Role : Manager
8. User licence : Salesforce
9. Profiles : Manager

New User

User Edit

Save Save & New Cancel

General Information

First Name: Niklaus
Last Name: Mikaelson
Alias: nmilka
Email:
Username: Mikaelson@Niklaus
Nickname: nik

Required Information

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

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

3. Save.

creating another users

1. Follow the same steps from above activity and create another user using

1. Role : sales executive
2. User licence : Salesforce Platform
3. Profile : sales executive

2. Repeat the steps and create another user using

1. Role : sales person
2. User licence : Salesforce Platform
3. Profile : sales person

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The left sidebar includes links for Setup, Home, Object Manager, and various system settings like Permission Set Groups, Profiles, and Roles. The main content area displays a list of users under the heading 'All Users'. The table includes columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The profiles listed are Chatter Free User, Manager, sales executive, sales person, System Administrator, Analytics Cloud Integration User, and Analytics Cloud Security User.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty_00dns0000037qc42ai.eo55a3akhid@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Mikaelson Niklaus	nmika	sireeshakandi7@gmail.com	Manager	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	Mikaelson Niklaus	mika	sireesha@kandi.com	sales executive	<input checked="" type="checkbox"/>	sales executive
<input type="checkbox"/>	Mikaelson Niklaus	nmika	kandi@sireesha.com	sales person	<input checked="" type="checkbox"/>	sales person
<input type="checkbox"/>	Sireesha Kandi	KSire	sireeshakandi@lendi.org	System Administrator	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	User Integration	integ	integration@00dns0000037qc42ai.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User Security	sec	insightsecurity@00dns3000037qc42ai.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

MILESTONE-10

PERMISSION SETS

Permission sets

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

Creating permission set

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

1. Go to setup ? type “**permission sets**” in quick search ? select permission sets ?

New.

The screenshot shows the Salesforce Setup page. The top navigation bar includes 'Search Setup', 'Object Manager', and various icons. The left sidebar has 'Setup' selected, followed by 'Permission sets', 'Users', and 'Permission Sets'. A message at the bottom left says ' Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Permission Sets' and contains a sub-section 'Permission Sets'. It says 'On this page you can create, view, and manage permission sets.' Below this is a note about using the Salesforce mobile app. At the bottom of the list, there's a 'New' button highlighted with a red box. The table lists several permission sets:

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

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

Save | Cancel

Enter permission set information

Label: P1

API Name: P1

Description: additional access for sales executive profile

Session Activation Required:

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**
Object Settings Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes
- Visualforce Page Access**
Permissions to execute Visualforce pages
- External Data Source Access**
Permissions to authenticate against external data sources
- Flow Access**
Permissions to execute Flows
- Named Credential Access**
Permissions to authenticate against named credentials
- Custom Permissions**
Permissions to access custom processes and apps
- Custom Metadata Types**
Permissions to access custom metadata types
- Custom Setting Definitions**
Permissions to access custom settings

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

Permission Set P1

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

Permission Set Overview > Object Settings ▾ **Fuel details** ▾

Fuel details

Tab Settings

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

Object Permissions

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

5. Click on Save.

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

All Users

1 item selected

Full Name ↑	Alias	Username	Role	Active	Profile
<input checked="" type="checkbox"/> abd c	ac	ab@cdt.com	Sales executive	<input checked="" type="checkbox"/>	sales executive
<input type="checkbox"/> Astro Nomical	anomi	astronomicalsecurity.2vhahccacrda.juzh67mibr0rgsa0l1dhzd@smart.com	<input type="checkbox"/>	Force.com - Free User	
<input type="checkbox"/> Brochan Pane	bpane	bpane.kh061622.nvopq5ltd9ylcwkqyhudbsxb@smart.com	<input type="checkbox"/>	Break Glass Administrator	
<input type="checkbox"/> Chatter Expert	Chatter	chatty.00d5i00000dpzofeadnb26j1owcvnq@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

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

MILESTONE-11

SETUP FOR OWD

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

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

The screenshot shows the Salesforce Setup interface. In the top-left corner, there's a search bar with the text "sharing". Below it, the "SETUP" icon is visible. On the left side, there's a sidebar with a tree structure. Under the "Security" node, the "Sharing Settings" item is highlighted with a red arrow pointing to it. The main content area is titled "Sharing Settings". It contains a message about displaying organization-wide sharing settings. Below that is a "Manage sharing settings for:" dropdown set to "All Objects". There's also a "Disable External Sharing Model" button. The "Default Sharing Settings" section is titled "Organization-Wide Defaults". It has a table with columns: "Object", "Default Internal Access", "Default External Access", and "Grant Access Using Hierarchies". The table rows show settings for Lead, Account and Contract, Contact, Order, and Asset. The "Edit" button in the header of this table is also highlighted with a red box.

2. Scroll down, change the default internal access to “**public read-only**” for Gas Station AND supplier object.

The screenshot shows a configuration page with various dropdown menus and checkboxes. The 'Gas Station' and 'Supplier' dropdowns are both set to 'Public Read Only' and are highlighted with a red box. The 'Save' button at the bottom left is also highlighted with a red box.

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**

- Click save.
- Extra information, By these every profile has their own access, according to their profile.
- 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.

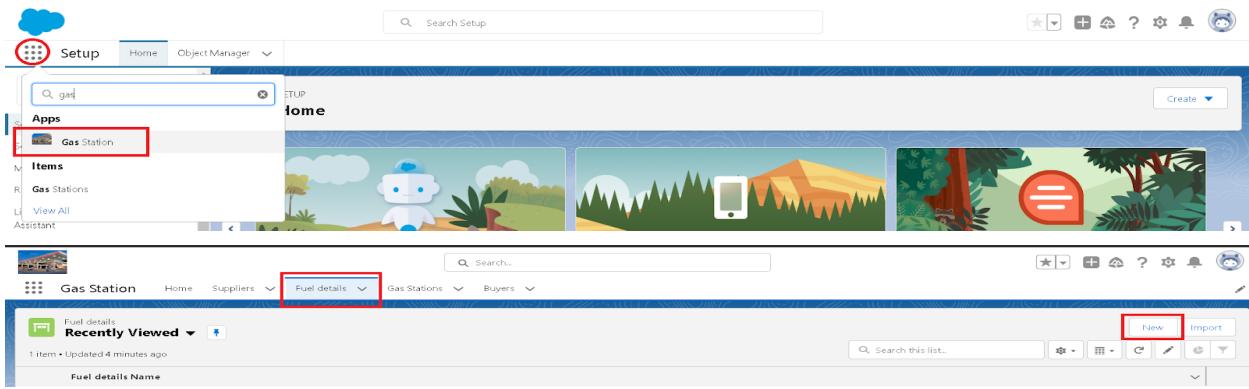
MILESTONE-12

USER ADOPTION

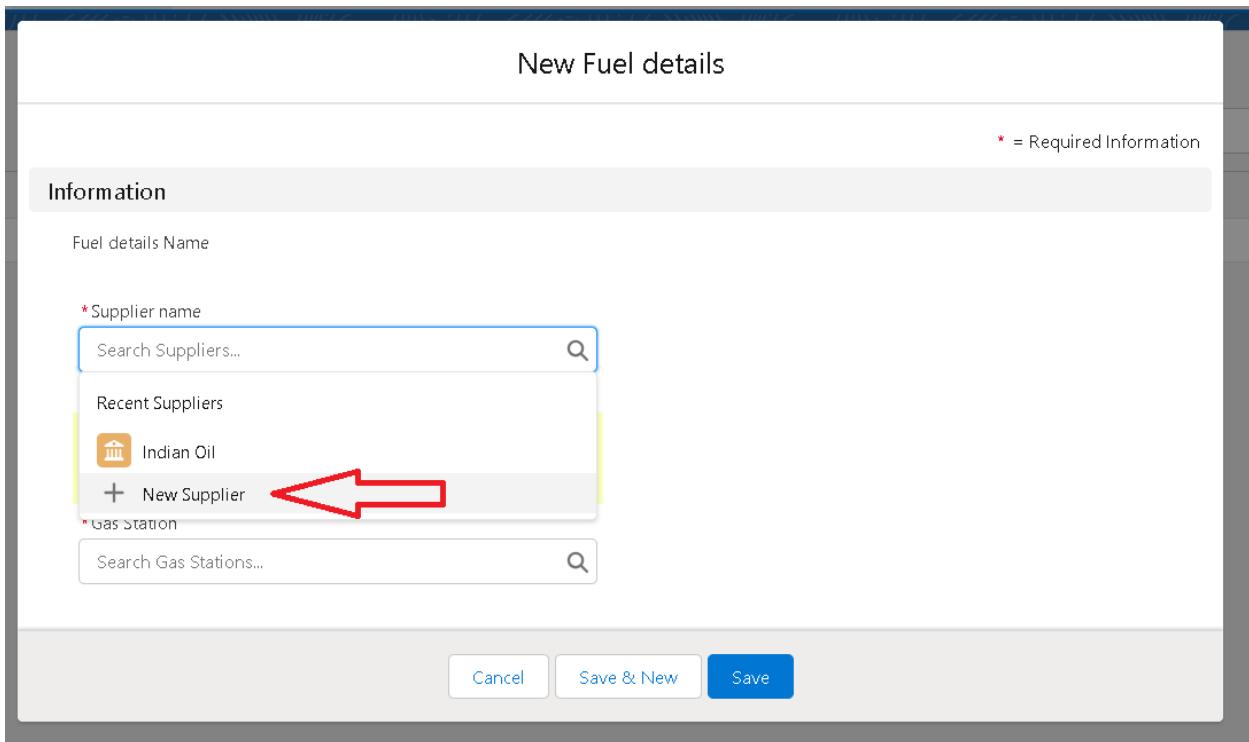
create a record

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.



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



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

New Supplier

Information

* supplier Name

HP

Owner

sunny 1

Cancel Save & New **Save**

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

* Gas Station

Search Gas Stations...

Recent Gas Stations

Gas-001

+ New Gas Station **New Gas Station** Save & New **Save**

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

New Gas Station

Information

Gas Station Name

Owner

sunny 1

Fuel price/liter

116

Cancel Save & New **Save**

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

Related **Details**

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

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

View a record

To create a record in junction object follow these steps

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

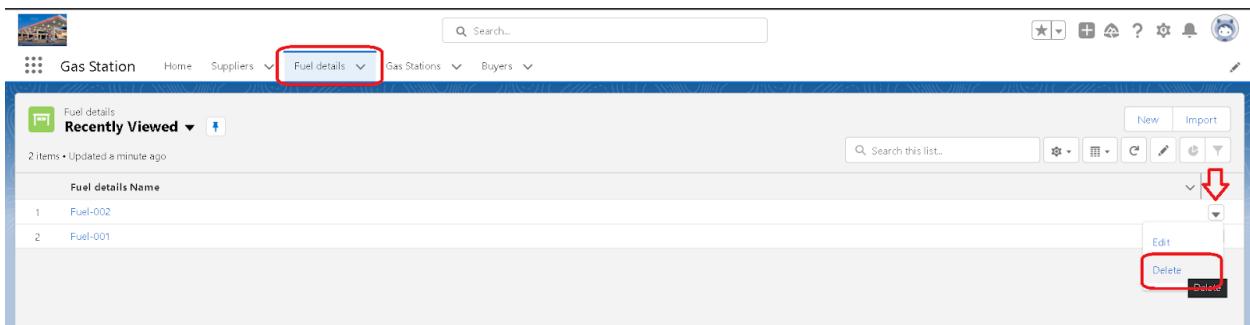
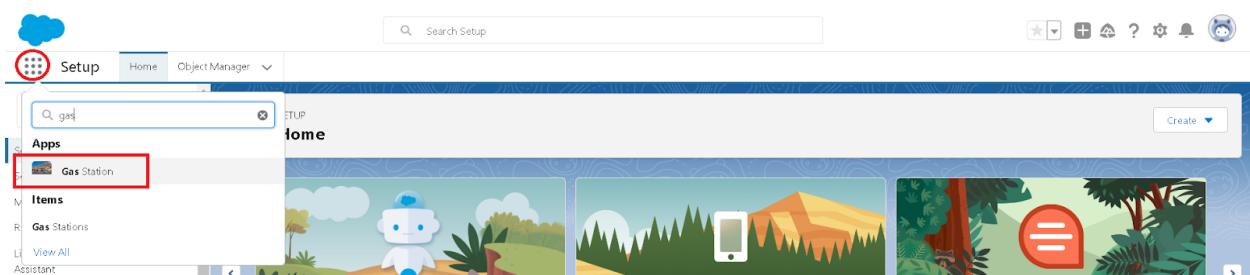
Related **Details**

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

Delete a record

To create a record in junction object follow these steps

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



MILESTONE-13

REPORTS

Reports

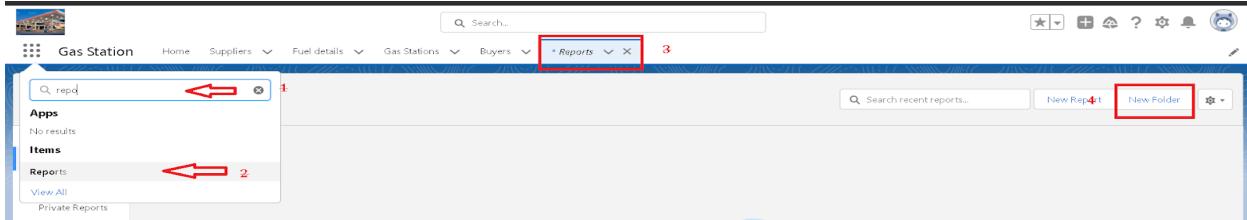
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce

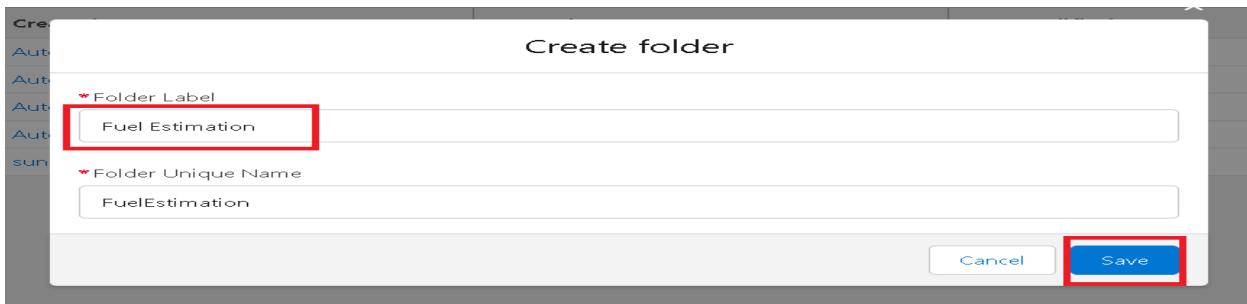
1. Tabular
2. Summary
3. Matrix
4. Joined Reports

create a report folder

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



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



Sharing a report folder

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

The screenshot shows the 'Gas Station' application interface. At the top, there's a navigation bar with links like Home, Suppliers, Fuel details, Gas Stations, Buyers, and Reports. The 'Reports' tab is currently selected, indicated by a red box. On the left, a sidebar lists categories: Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), Folders (All Folders, created by Me, Shared with Me), and Favorites (All Favorites). A red box highlights the 'All Folders' button. The main area displays a table of 'Reports' with columns for Name, Created By, Created On, Last Modified By, and Last Modified Date. One row in the table is highlighted with a red box. A context menu is open over this row, with a red box highlighting the 'Share' option.

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

The screenshot shows the 'Share folder' dialog box. It starts with a message: 'These sharing settings apply to all subfolders in this folder.' Under 'Share With', there's a 'Roles' input field (step 1) containing 'Manger' (step 2). To the right, there's an 'Access' dropdown set to 'View' (step 3). Below this, a 'Share' button is highlighted (step 4). At the bottom, there's a 'Who Can Access' section with a user named 'sunny 1' (step 5) and a 'Done' button.

Create Report

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

Try to fill every field in each record for better experience.

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

The screenshot shows the 'Reports' section of the Microsoft Dynamics 365 interface. The 'Reports' tab is selected, and the 'New Report' button is highlighted with a red box. The page displays a list of recent reports under the 'Recent' category, including 'Employee's working on projects report' and 'Assets assigned to Employees'. There are also sections for 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports'. A sidebar on the left lists 'FOLDERS'.

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

The screenshot shows the 'Create Report' dialog. In the 'Select a Report Type' section, the search bar contains 'gas' and the result 'Gas Stations with Buyers' is highlighted with a red box. To the right, the 'Details' pane shows the selected report 'Gas Stations with Buyers' (Standard Report Type) with a 'Start Report' button highlighted with a red box. Other sections in the details pane include 'Created By You' (No Reports Yet), 'Created By Others' (No Reports Yet), and 'Objects Used in Report Type' (Buyer).

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

REPORT ▾

New Gas Stations with Buyers Report / Gas Stations with Buyers

Fields >

Outline **Filters**

Groups

- GROUP ROWS**
 - Add group... 2
 - Fuel Available in bunk 2
- GROUP COLUMNS**
 - Add group... 4

Columns

- Add column... 4
- Customer name x
- # Fuel filled in vehicle x
- # Amount Paid x

Fuel Available in bunk 1 Customer name 1 Fuel filled in vehicle 1 Amount Paid 1

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

Fuel Available in bunk	Customer name	Fuel filled in vehicle	Amount Paid
2,718.00 (7)	sunny bunny	70	₹6,720.00
	bunny g	15	₹1,440.00
	upadhye shivam	70	₹6,720.00
	sandeep gujja	7	₹672.00
	drug dealer	2,000	₹11,200.00
	sasuke uchiha	50	₹4,800.00
	naruto uzumaki	70	₹6,720.00
			Subtotal
			2,282
			Total (7) ₹21,072.00

Row Counts Detail Rows Subtotals Grand Total

Update Preview Automatically

Conditional Formatting 3

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

Conditional Formatting Rules

No Conditional Formatting Rules Created

Add Conditional Formatting Rule 4

Cancel Apply

9. Change the apply conditional formatting to “**sum of Amount paid**”.
10. Mention the range from “**1000 to 5000**”.
11. Don't change the colours, and click on Done.
12. Click apply.

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

Conditional Formatting Rules (7)

Add Conditional Formatting Rule

Apply Conditional Formatting to 1

Sum of Amount Paid	2
--------------------	---

Range

<=	0 2	Background Color 2	x
> 0 to	5,000 2	Background Color 2	x
>	5,000	Background Color 2	x

Background Color

Cancel Done 3

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

15. click on save.



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

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

MILESTONE-14

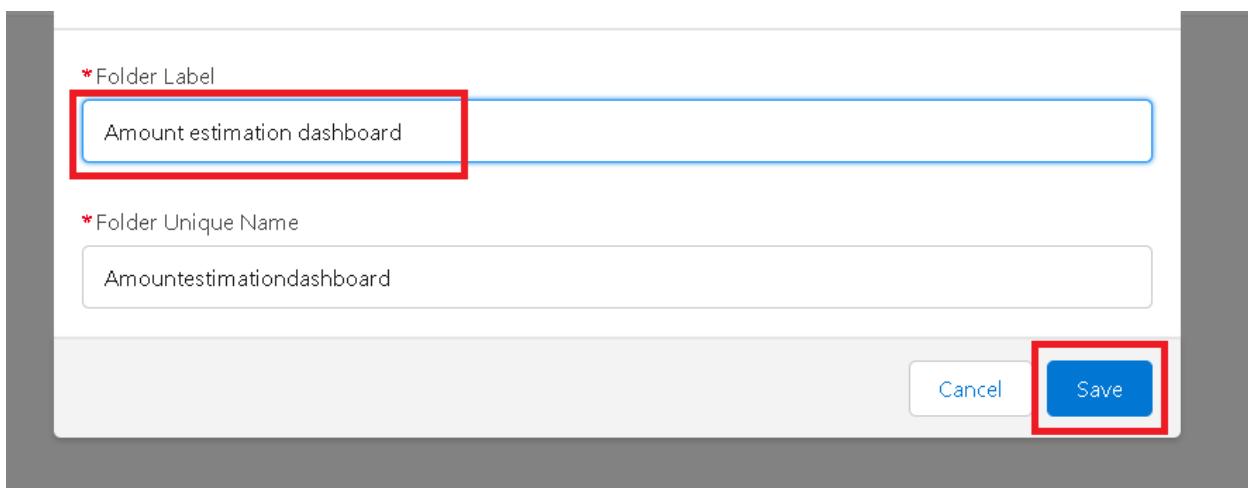
DASHBOARDS

Dashboards

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

Create Dashboard Folder

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



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

Create Dashboard

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

The screenshot shows the Employee Management application interface. At the top, there is a navigation bar with various tabs: Home, Employees, Assets, Asset Services, Projects, ProjectTasks, Reports, and Dashboards. The 'Dashboards' tab is currently selected and highlighted with a red box. Below the navigation bar, there is a search bar labeled 'Search...' and a toolbar with several icons. On the left, there is a sidebar titled 'Dashboards Recent' with options like 'Recent', 'Created by Me', 'Private Dashboards', and 'All Dashboards'. The main area is a large, empty space with a placeholder icon.

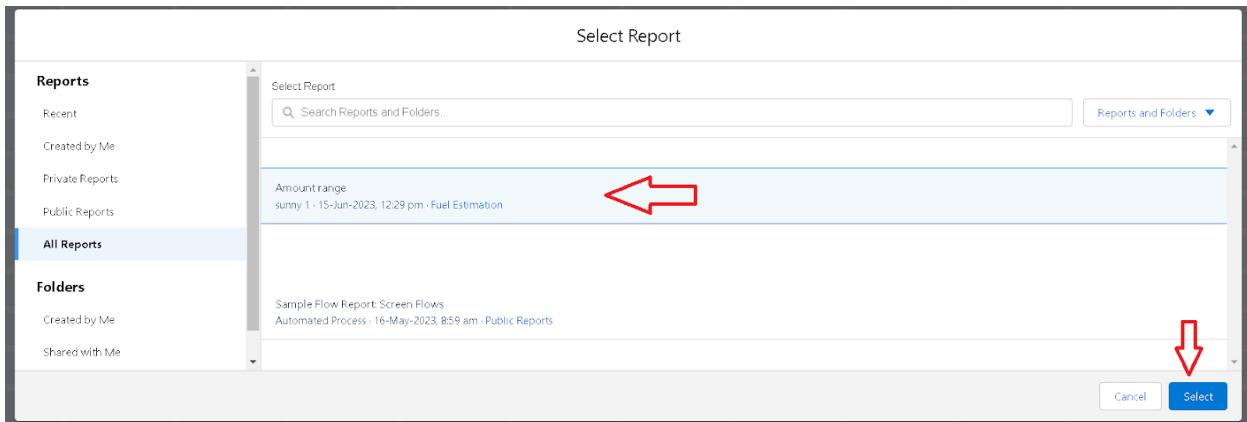
2. Give a Name and select the folder that created, and click on create.

The screenshot shows a 'New Dashboard' dialog box. It has fields for 'Name' (containing 'Estimation amount') and 'Description' (empty). Under 'Folder', it shows 'Amount estimation dashboard' in a dropdown menu, which is also highlighted with a red box. To the right of the dropdown is a 'Select Folder' button. At the bottom right are 'Cancel' and 'Create' buttons, with 'Create' also highlighted with a red box.

3. Select add component.

The screenshot shows the dashboard editor interface. At the top, there is a navigation bar with tabs: Home, Employees, Assets, Asset Services, Projects, ProjectTasks, Reports, and Dashboards. The 'Dashboards' tab is selected. Below the navigation bar, there is a search bar labeled 'Search...' and a toolbar with icons for 'Save' and 'Done'. The main area is a grid-based dashboard editor. In the top right corner of the editor, there is a blue button labeled '+ Component' which is highlighted with a red box.

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.

The screenshot shows a report titled 'Estimation amount' with a subtitle 'As of 15-Jun-2023, 2:50 pm Viewing as sunny 1'. The main section is titled 'Amount range' and displays a horizontal bar chart. The chart has three columns: 'Customer name', 'Fuel Available in bunk', and 'Sum of Fuel filled in vehicle'. The 'Fuel Available in bunk' column shows values like 2,718.00 for 'bunnyg', 2,718.00 for 'drug d...', etc. The 'Sum of Fuel filled in vehicle' column shows values like 15, 2k, 70, 7, 50, 70, 70. The chart has major ticks at 0, 1k, and 2k. A blue button labeled '2,718.00' is visible on the right. A link 'View Report (Amount range)' is at the bottom.

Customer name	Fuel Available in bunk	Sum of Fuel filled in vehicle
bunnyg	2,718.00	15
drug d...	2,718.00	2k
naruto ...	2,718.00	70
sande...	2,718.00	7
sasuk...	2,718.00	50
sunny ...	2,718.00	70
upadhy...	2,718.00	70

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

MILESTONE-15

FLows

Flows

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

Create a Flow

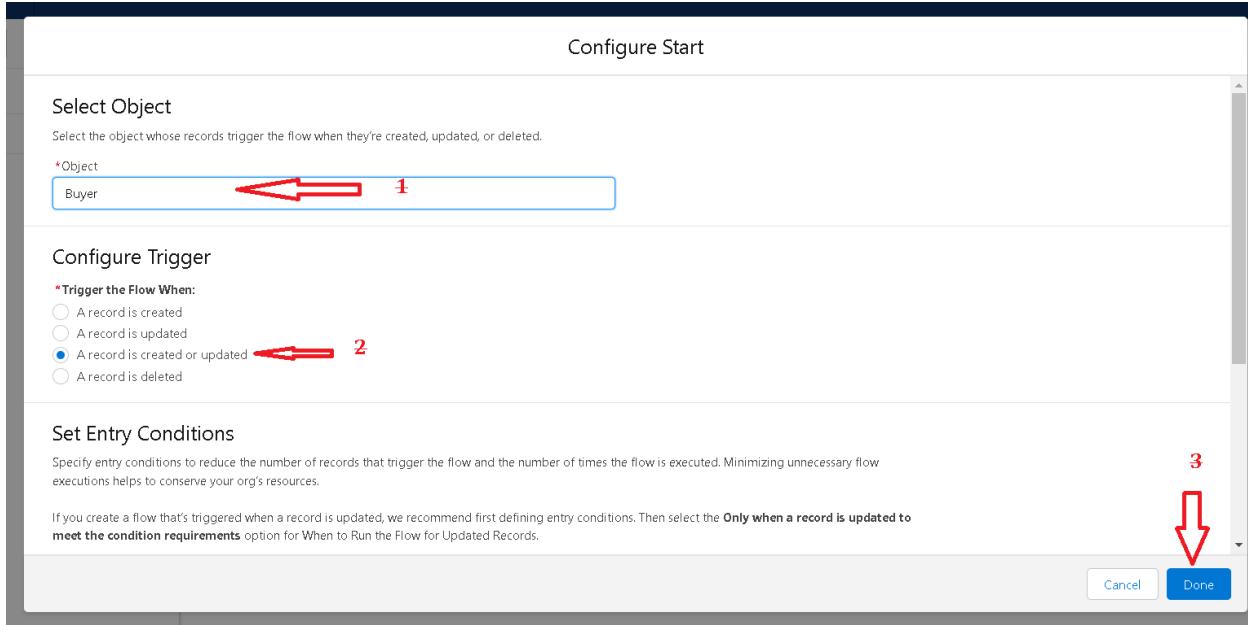
1. Go to setup ? type Flow in quick find box ? Click on the Flow and Select the New Flow.

The screenshot shows the Salesforce Setup interface. In the left sidebar, 'Process Automation' is expanded, and 'Flows' is selected. The main area displays a list of flow definitions. At the top right of the main area, there is a 'New Flow' button, which is also highlighted with a red box.

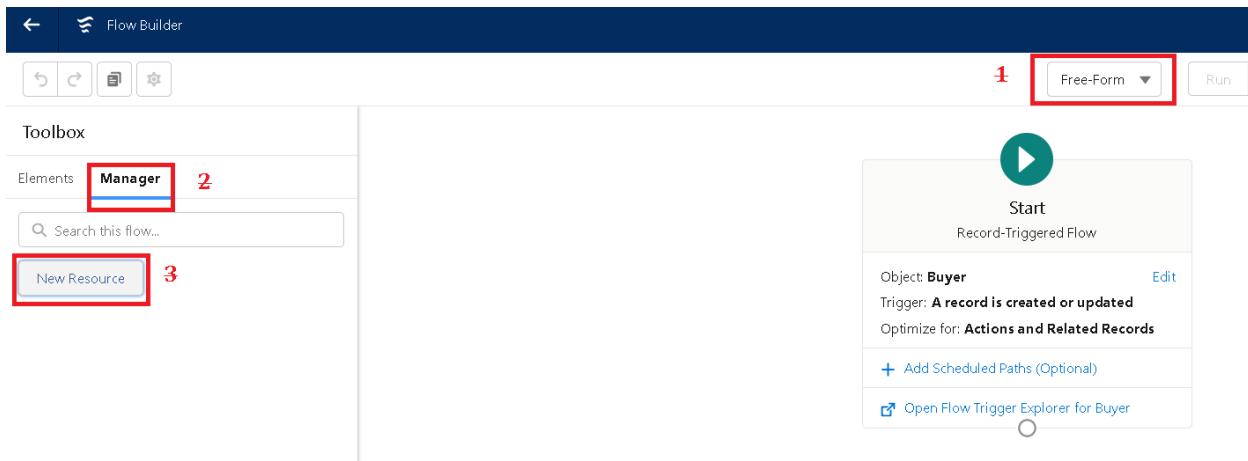
2. Select the Record-triggered flow and Click on Create.

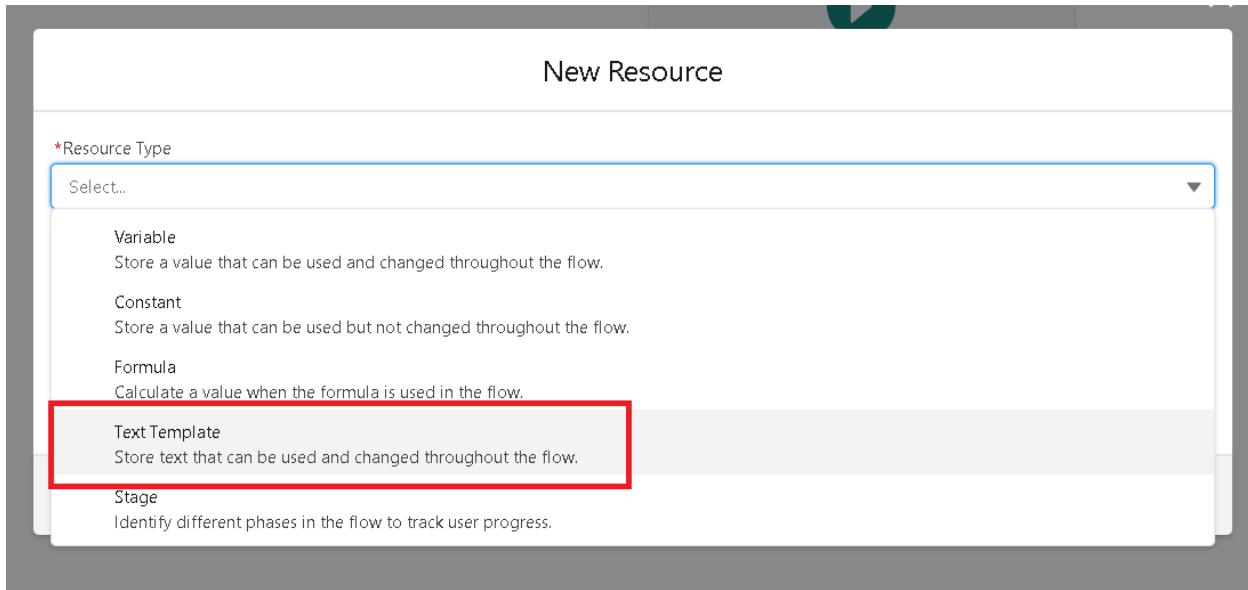
The screenshot shows the 'New Flow' creation page. Under the 'Core' tab, several flow types are listed: Screen Flow, Record-Triggered Flow, Schedule-Triggered Flow, Platform Event—Triggered Flow, Autolaunched Flow (No Trigger), and Record-Triggered Orchestration. The 'Record-Triggered Flow' option is highlighted with a red box. At the bottom right of the page, there is a large blue 'Create' button, which is also highlighted with a red box.

3. Select the Object as a “**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**” and Click on Done



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





9. Enter the API name as “ **emailbody** ”.

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

Hello {!\$Record.Customer_name_c},

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

RECEPIT DETAILS :

Customer name : {!\$Record.Customer_name_c}

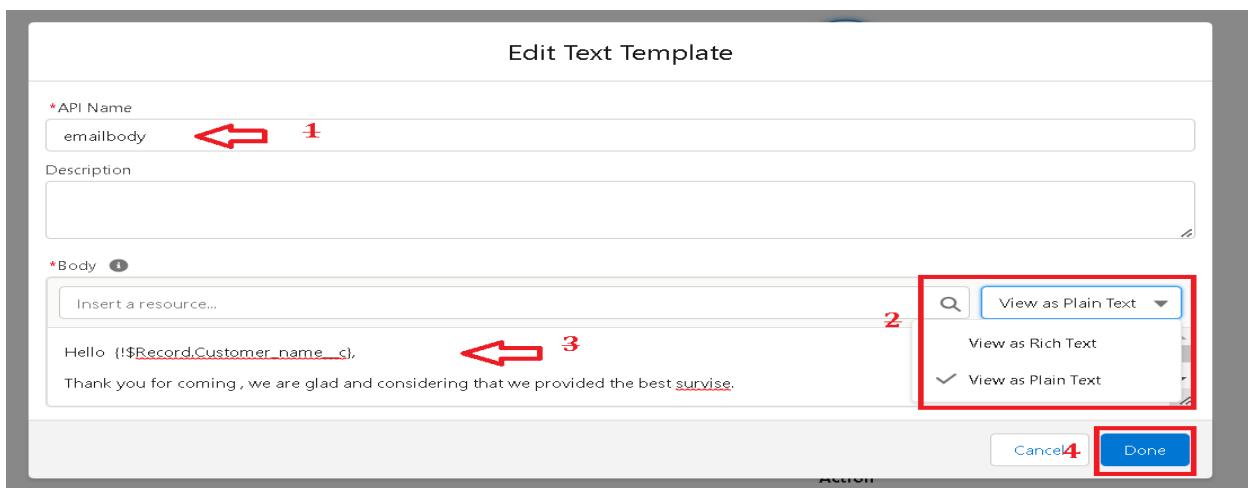
Amount paid by Customer : {!\$Record.Amount_Paid_c}

Vehicle type : {!\$Record.Vehicle_type_c}

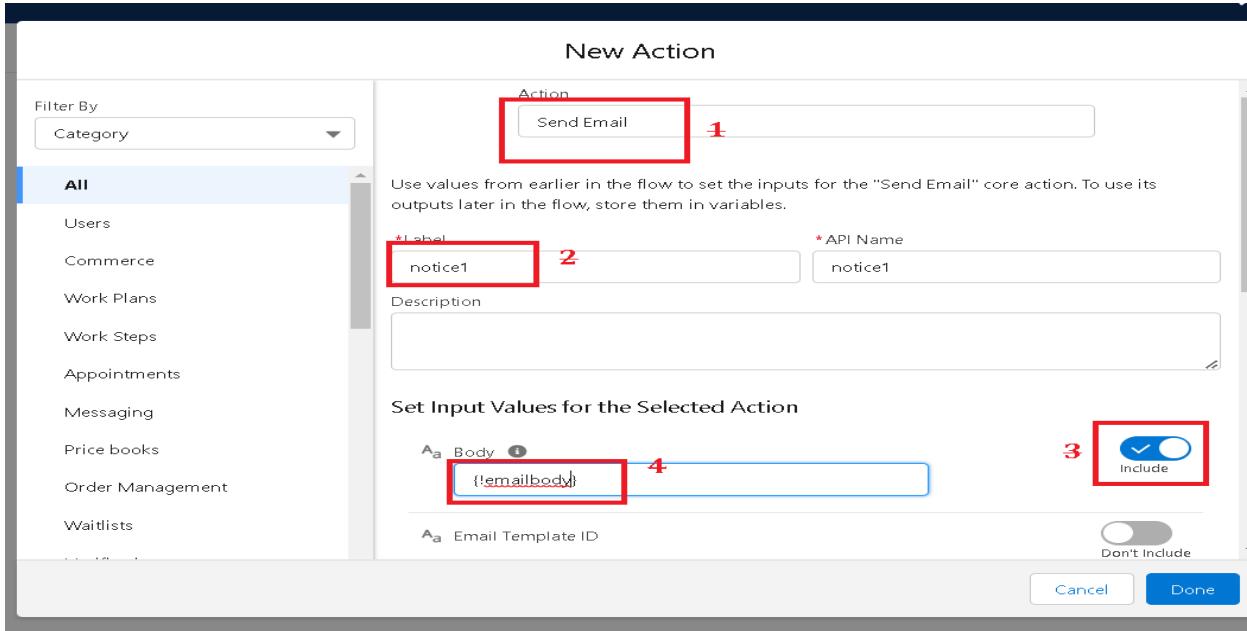
Fuel intake in vehicle : {!\$Record.Fuel_filled_in_vehicle_c}

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

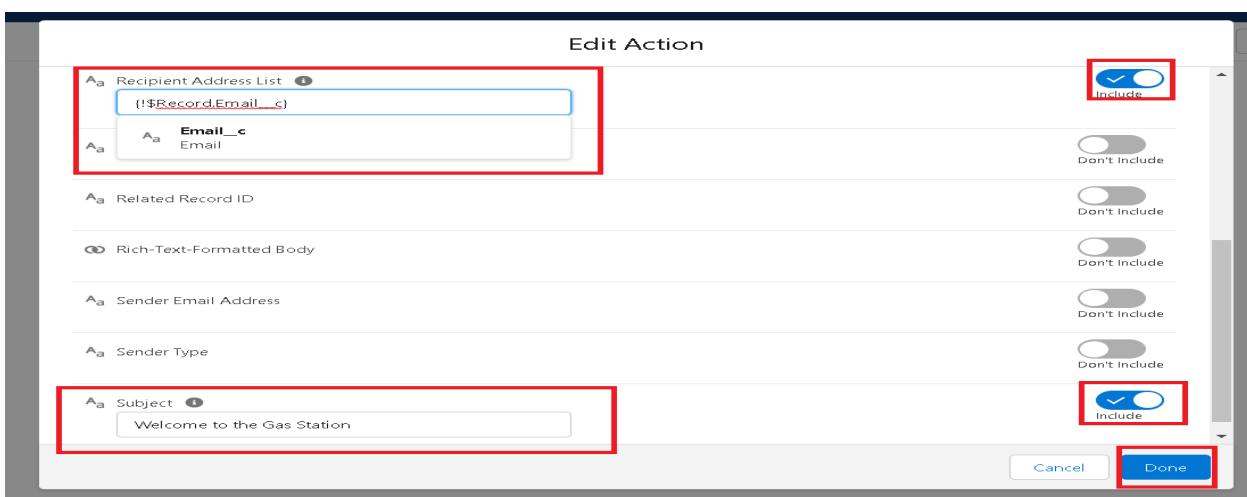
12. Click done.



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



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



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

Save the flow

*Flow Label *Flow API Name
Description

Show Advanced

Cancel Save

Free-Form ▼ Version 8: Active—Last modified a few seconds ago Run Debug View Tests Deactivate Save As Save

