

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

by

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## **PROJECT ABSTRACT**

Implementing a **Customer Relationship Management (CRM)** system in a gas station can significantly streamline operations and enhance customer service. By centralizing customer data, purchase history, and preferences, a CRM allows the gas station administration to provide personalized experiences, tailor promotions, and anticipate customer needs. This system can automate routine tasks, such as sending reminders for fuel refills or oil changes, thereby increasing customer loyalty and satisfaction. Additionally, a CRM can integrate with inventory management to ensure that the station is always stocked with necessary products, reducing downtime and improving overall efficiency.

From an administrative perspective, a **CRM** provides valuable insights through data analytics, enabling better decision-making and strategic planning. Administrators can track sales trends, customer behavior, and operational performance in real-time, identifying areas for improvement and potential growth opportunities. The system can also facilitate seamless communication between staff, ensuring that everyone is aligned with the station's goals and customer service standards. Ultimately, a well-implemented **CRM** system enhances the operational efficiency of a gas station, boosts customer satisfaction, and drives business growth by leveraging data-driven strategies.

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## **MILESTONE-1: SALESFORCE**

### **What is Salesforce:**

Salesforce is a cloud-based software company that helps businesses manage customer relationships and streamline operations. It offers a variety of services, including sales management, customer support, marketing automation, and data analytics, all within a single platform. This platform enables businesses to track customer interactions, automate routine tasks, and gain valuable insights from their data, improving decision-making and customer satisfaction. Renowned for its scalability, flexibility, and extensive customization options, Salesforce is widely used by companies of all sizes to enhance customer engagement and optimize business processes.



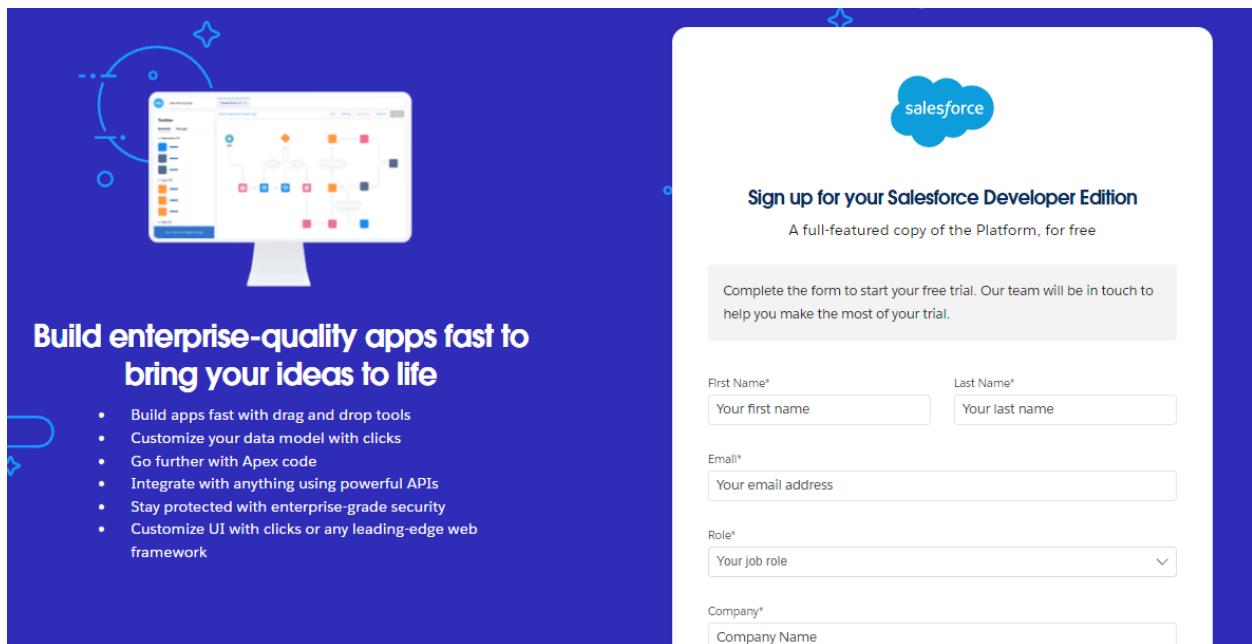
### **➤ Creating Developer Account:**

- First,to begin our project by creating the Developer Account.

- we create the account by using the link:  
[\*\*https://developer.salesforce.com/signup\*\*](https://developer.salesforce.com/signup)
- We need to give the following for the account creation:
  1. First Name
  2. Last Name
  3. Email
  4. Assign the Role as Developer
  5. Country as India
  6. Assign the PinCode

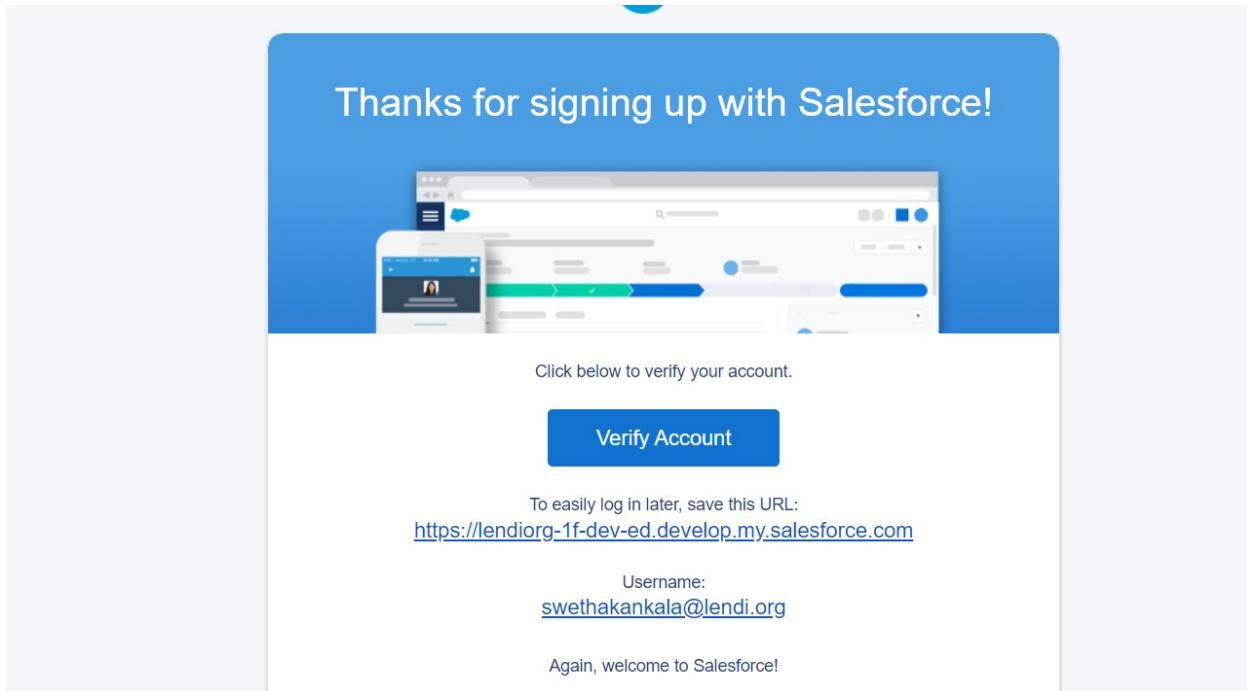
**NOTE:**

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.



► **Account Activation:**

- Redirect to email inbox to check whether the mail is received for the developer account activation.
- Click on the Verify Account.



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

The image shows a "Change Your Password" form. At the top, it says "Enter a new password for lead@sb.oom." and "Make sure to include at least:" followed by three requirements with checkmarks:

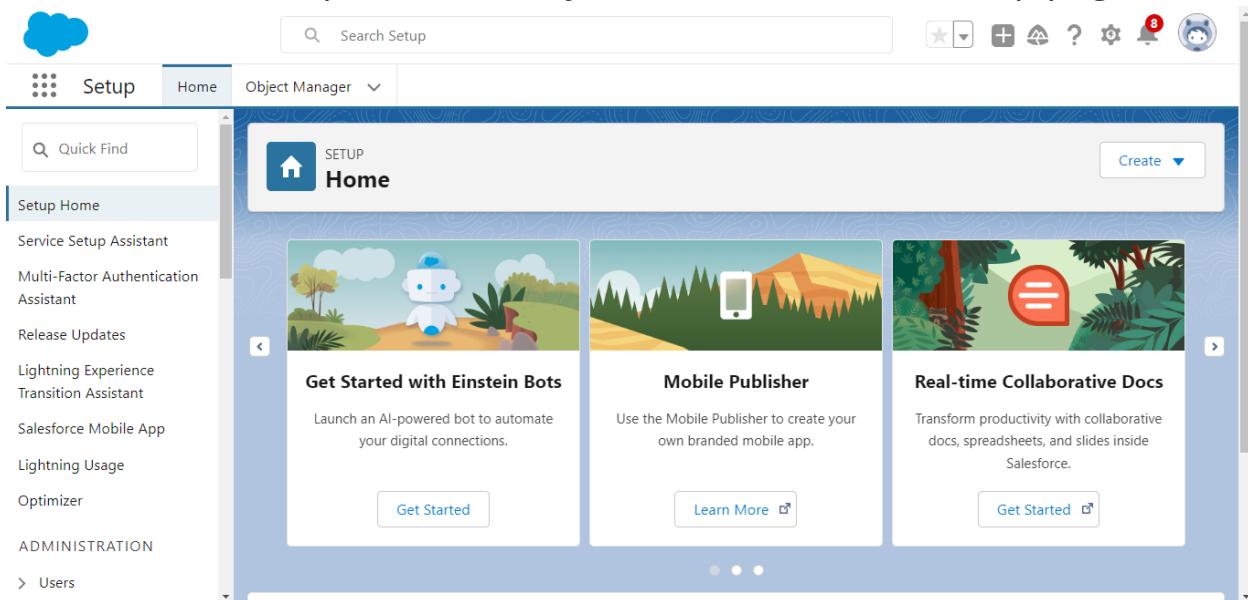
- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

Below these requirements are two password input fields:

- \* New Password: A green input field containing "\*\*\*\*\*" with a "Good" status message to its right.
- \* Confirm New Password: A green input field containing "\*\*\*\*\*" with a "Match" status message to its right.

Further down the form is a "Security Question" section with a dropdown menu showing "In what city were you born?". Below that is an "Answer" input field containing "asdfghjkl". At the bottom of the form is a large blue "Change Password" button.

- Then this step will redirect you to the salesforce Setup page.



## **MILESTONE-2: OBJECT**

### **What is an Object:**

In Salesforce, an "object" is a database table that stores data related to a specific type of information. Objects are fundamental components of the Salesforce data model and can be broadly categorized into two types: Standard Objects and Custom Objects.

### **Standard Objects:**

These are pre-defined by Salesforce and come with the platform

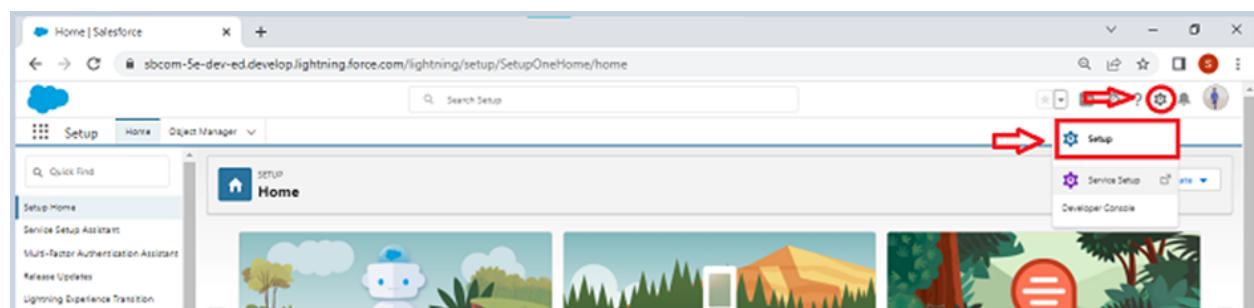
Examples:users, Leads, Reports, Dashboards.

## Custom Objects:

These are created by users to store information that is specific to their organization. Custom objects allow businesses to extend Salesforce's functionality to meet their unique requirements. For example, a company might create a custom object to track project details, inventory items, or event registrations.

To Navigate to Setup Page:

Click on gear icon?click Setup



Here the Objects created under Objects for this Application:

- Create a Supplier Object
- Create Gas Station Object
- Create Buyers and Fuel Details Object

### ► Create a Supplier Object:

- From the setup page?Click on Object Manager?Click on Create?Click on Custom Object.
- Enter the label name? Supplier
- Plural label name? Suppliers

- Enter Record Name Label and Format
- Record Name ? Supplier Name
- Data Type ? Name
- Click on Allow reports and Track Field History.
- Allow search and then Save.

SETUP > OBJECT MANAGER  
Supplier

Details	
Fields & Relationships	Description
Page Layouts	API Name Supplier__c Custom
Lightning Record Pages	Singular Label Supplier
Buttons, Links, and Actions	Plural Label Suppliers
Compact Layouts	
Field Sets	
Object Limits	
Record Types	
Related Lookup Filters	
Search Layouts	
List View Button Layout	
Restriction Rules	
Scoping Rules	

Edit    Delete

## ► Create Gas Station Object:

To create an object:

- From the setup page ? Click on Object Manager ? Click on Create ? Click on Custom Object.
- Enter the label name? Gas Station
- Plural label name? Gas Stations
- Enter Record Name Label and Format
- Record Name ? Gas Station
- Data Type ? Auto Number
- Display Format ? Gas-{000}
- Starting number ? 1
- Click on Allow reports and Track Field History,
- Allow search ? Save.

The screenshot shows the 'Object Manager' setup page for a 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 content area is titled 'Details' and contains fields for API Name ('Gas\_Station\_\_c'), Description ('Gas Station'), Singular Label ('Gas Station'), and Plural Label ('Gas Stations'). On the right, there are sections for 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' ('Deployed'), and 'Help Settings' ('Standard salesforce.com Help Window'). At the top right, there are 'Edit' and 'Delete' buttons.

## ► Create Buyers and Fuel Details Object:

### Buyers Object:

- From the setup page ? Click on Object Manager ? Click on Create ? Click on Custom Object.
- Label name ? Buyer
- Plural label name ? Buyers
- Display Format ? Buyer-{000}
- Starting number ? 1
- Click on Allow reports and Track Field History,
- Allow search ? Save.

SETUP > OBJECT MANAGER  
**Buyer**

**Details**

Description	
API Name	Buyer__c
Custom	✓
Singular Label	Buyer
Plural Label	Buyers
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

**Edit** **Delete**

## Fuel Details Object:

- From the setup page ? Click on Object Manager ? Click on Create ? Click on Custom Object.
- Label name ? Fuel details
- Plural label name ? Fuel details
- Display Format ? fuel-{000}
- Starting number ? 1
- Click on Allow reports and Track Field History,
- Allow search ? Save.

SETUP > OBJECT MANAGER  
**Fuel details**

**Details**

Description	
API Name	Fuel_details__c
Custom	✓
Singular Label	Fuel details
Plural Label	Fuel details
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

**Edit** **Delete**

- The above mentioned objects are required for filling the Gas

Station Application.

### **MILESTONE-3:TABS**

#### **What is a Tab?**

In Salesforce, a "tab" is a user interface component that provides a way to access different types of information and functionality within the platform. Tabs are designed to help users navigate Salesforce's features and data easily. There are several types of tabs in Salesforce, including:

- 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.

- 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.

- 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.

- Lightning Component Tabs :**

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

- 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:**

**1.To create Tab:Supplier:**

- Go to setup page ? type Tabs in Quick Find bar ? click on tabs ? New (under custom object tab)
- 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 .
- Make sure that Append tab to users' existing personal customizations is checked.
- Click save.

**2.To create Tab:Gas Station**

- Go to setup page?Search for tabs and then select tabs.
- Select Object(Gas Station)?Select the tab style as Factory.
- Uncheck the include tab.
- Make sure append tab to users is checked and the save.

**3.To create Tab:Buyer**

- Go to setup page?Search for tabs and then select tabs.
- Select Object(Buyer)?Select the tab style as presenter.
- Uncheck the include tab.
- Make sure append tab to users is checked and the save.

#### 4.To create Tab:Fuel details:

- Go to setup page?Search for tabs and then select tabs.
- Select Object(Fuel details)?Select the tab style as Form.
- Uncheck the include tab.
- Make sure append tab to users is checked and the save.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar shows 'User Interface' and 'Tabs'. The main area has a heading 'Custom Tabs' with a sub-section 'Custom Object Tabs'. A table lists four tabs: 'Buyers' (Presenter), 'Fuel details' (Form, highlighted in green), 'Gas Stations' (Factory), and 'Suppliers' (People). Below this are sections for 'Web Tabs' and 'Visualforce Tabs', both of which currently have no tabs defined.

Action	Label	Tab Style	Description
Edit   Del	Buyers	Presenter	
Edit   Del	Fuel details	Form	
Edit   Del	Gas Stations	Factory	
Edit   Del	Suppliers	People	

### MILESTONE 4:The Lightning App

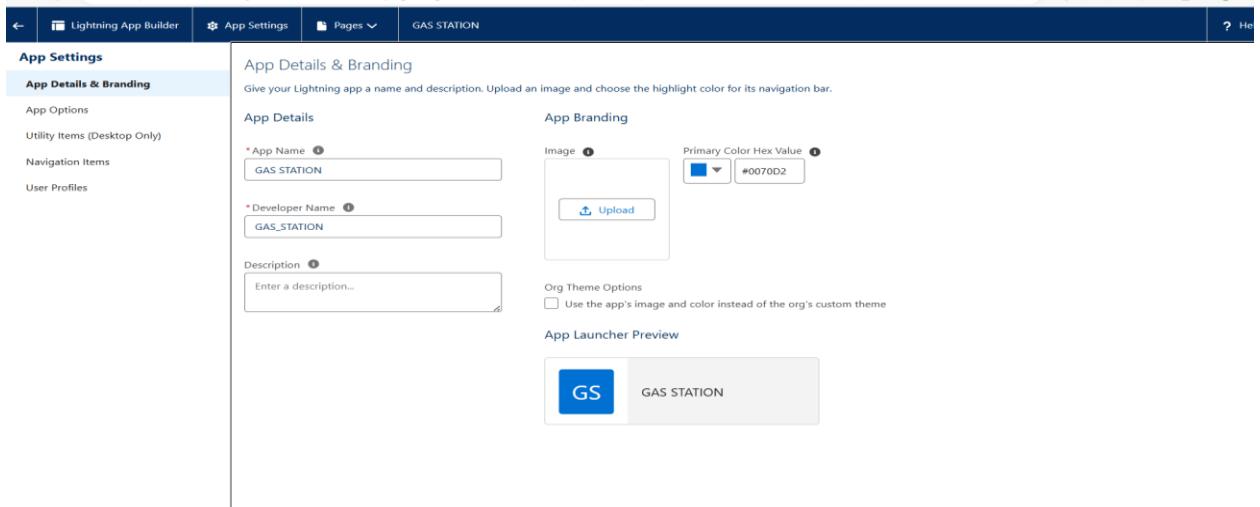
#### What is Lightning App:

A Lightning App in Salesforce is a collection of items that work together to serve a particular function for users. 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:

- Go to Setup page, search for App Manager and then select and click on New Lightning App.
- Assign the App Name as GAS STATION and retain Add option page and Utility items as Default and click on Next.
- To add Navigation Items. Select the required items from Search bar (Supplier, Gas Station, Buyer, Receipt) move it using the arrow button and click on Next.
- Finally, to add User Profile, search for System administrator and move with the help of arrow and the click save and finish.



## MILESTONE-5:FIELDS

In Salesforce, fields are the individual data points that make up the records within an object. Each field stores specific information about an aspect of the record. Fields are analogous to columns in a database table or attributes in a spreadsheet.

- ### ► Types of Fields
- Standard Fields

- 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:**

- Creating junction object as Fuel details with Supplier & Gas station
- To create junction object
- Go to the setup page ? click on object manager ? From drop down click edit for Fuel details object.

The screenshot shows the Salesforce Object Manager. A red box highlights the 'Object Manager' dropdown menu in the top-left corner, with a red arrow pointing to it. Another red box highlights the 'Create' button in the top-right corner, with a red arrow pointing to it. A third red box highlights the 'API NAME' column header in the table, with a red arrow pointing to it. The table lists two objects: 'Student\_Activity' and 'Student\_Activity'. The 'Student\_Activity' row has a red box around its entire row, with a red arrow pointing to it. The table includes columns for API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED.

API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Student_Activity	Custom Object	College Management System	15/10/2022	✓
Student_Activity	Custom Object	created for the purpose of junction object	06/01/2023	✓

Click on fields & relationship ? click on New.

- Select “Master-Detail relationship” as data type and click Next.
- Select the related object “ Supplier ” and click next.

The screenshot shows a configuration interface for a custom field. At the top, it says "Specify the type of information that the custom field will contain." Below that is a section titled "Data Type" with a sub-instruction "Select one of the data types below". There are several options:

- "None Selected"
- "Auto Number": A system-generated sequence number.
- "Formula": A read-only field derived from a formula.
- "Roll-Up Summary": A read-only field showing summary values from related records.
- "Lookup Relationship": Creates a relationship to another object.
- "Master-Detail Relationship": A special type of parent-child relationship, which is the selected option and highlighted with a red box.
- "External Lookup Relationship": A relationship to an external object.

At the bottom right of the interface are "Next" and "Cancel" buttons, with a yellow arrow pointing to the "Next" button.

- Give Field Label as “Supplier Name” and click Next.
- Next ? Next ? Save & New.
- Follow the steps to create the Gas Station Object.

### ► Creating a Master-Detail Relationship:

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

### ► Creating the number field in Fuel details object

- Repeat the steps mentioned in the activity 1 and 2.
- Make sure that the datatype should as Number.

## ► Creating the Roll-up Summary

- Go to Setup, click on Object manager and give the object name as Supplier.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar has tabs for 'Setup', 'Home', and 'Object Manager'. A red arrow points to the 'Object Manager' tab. The search bar at the top right contains the word 'Student', with a red box highlighting it. Below the search bar, there is a 'Create' button. The main table lists objects with columns for 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. The first object listed is 'Student'.

- click on Fields and Relationships and click on new.

The screenshot shows the 'Fields & Relationships' section for the 'Student' object. The left sidebar has links like 'Page Layouts', 'Lightning Record Pages', etc., with 'Fields & Relationships' highlighted by a red box. The main area is a grid titled 'Fields & Relationships' with columns for 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. A red box highlights the 'New' button in the top right corner of the grid.

- Select the data type as roll up summary.

The screenshot shows the 'Data Type' configuration screen. It asks to specify the type of information the custom field will contain. Below is a list of data types:

- None Selected
- Auto Number
- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship

Each data type has a brief description. The 'Roll-Up Summary' description states: "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." A red arrow points to the 'Next' button in the top right corner.

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

Step 2. Enter the details

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](#)

- Select the summarized object as “ Fuel details ”.
- Select the Rollup type as “sum”.

Step 3. Define the summary calculation

Select Object to Summarize

Master Object Supplier  
Summarized Object

I = Required Information

Select Roll-Up Type

COUNT  
 SUM   
 MIN  
 MAX

Field to Aggregate    
--None--  
Fuel supplied

Filter Criteria

All records should be included in the calculation  
 Only records meeting certain criteria should be included in the calculation

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

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

## ► Creating Formula Field in Gas Station Object

- Go to setup ? click on Object Manager ? type object name(Gas station ) in search bar ? click on the object.
- Click on fields & relationship ? click on New.
- Select Data type as "Formula" and click Next.
- 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`

DateTime Calculate a date/time, for example, by adding a number of hours or days to another date/time.  
Example: `New = 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`

- Under Advanced Formula write down the formula and click "Check Syntax" and Save.
- 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 [▼](#)

Fuel Available in bunk (Number) =  Fuel\_supplied\_to\_bunk\_c - Fuel\_Used\_c

Functions

-- All Function Categories

**ABS**

ACOS

ADDMONTHS

AND

ASCII

ASIN

[Insert Selected Function](#)

## ► 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
- Go to setup ? click on Object Manager ? type object name(Buyer) in search bar ? click on the object.
- Click on fields & relationship ? click on New.
- Select Data type as “Formula” and click Next.
- Give Field Label and Field Name as “Customer Name” and select formula return type as “TEXT” and click next.
- Insert field formula should be : First\_Name\_c + ' ' + Last\_Name\_c
- click “Check Syntax” and Save.

## ► Creating Cross Object 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.
- Go to setup ? click on Object Manager ? type object name(Buyer) in search bar ? click on the object.
- Click on fields & relationship ? click on New.
- Select Data type as “Formula” and click Next.
- 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  Previous Next Cancel

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)`

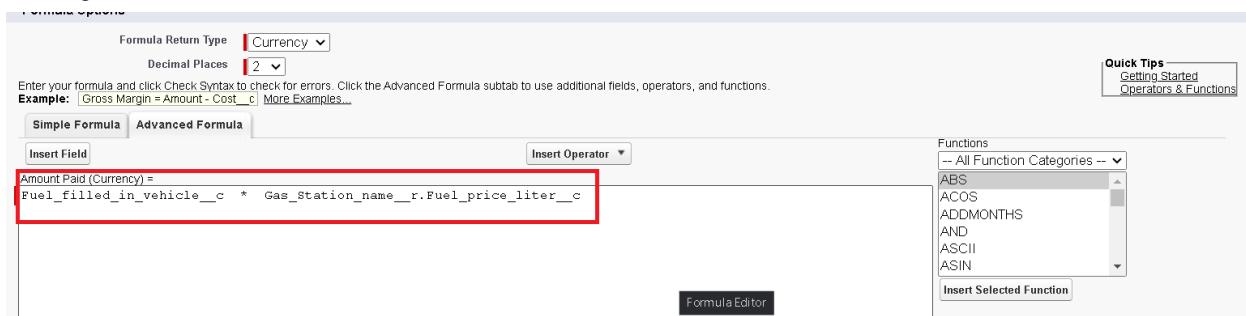
Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.  
Example: `(Event Date = CloseDate + 1)`

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)`

Insert fields formula should be :

- Fuel\_filled\_in\_vehicle\_\_c \*
- Gas\_Station\_name\_\_r.Fuel\_price\_liter\_\_c
- Under Advanced Formula write down the formula and click “Check Syntax” and Save.



## ► Creating Picklist Field in Buyer Object

- Go to setup ? click on Object Manager ? type object name(Buyer) in search bar ? click on the object.
- Click on fields & relationship ? click on New.
- Select Data type as “Picklist” and click Next.
- 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.
- The values are: two wheeler, three wheeler, four wheeler, six wheeler, eight wheeler and Others.

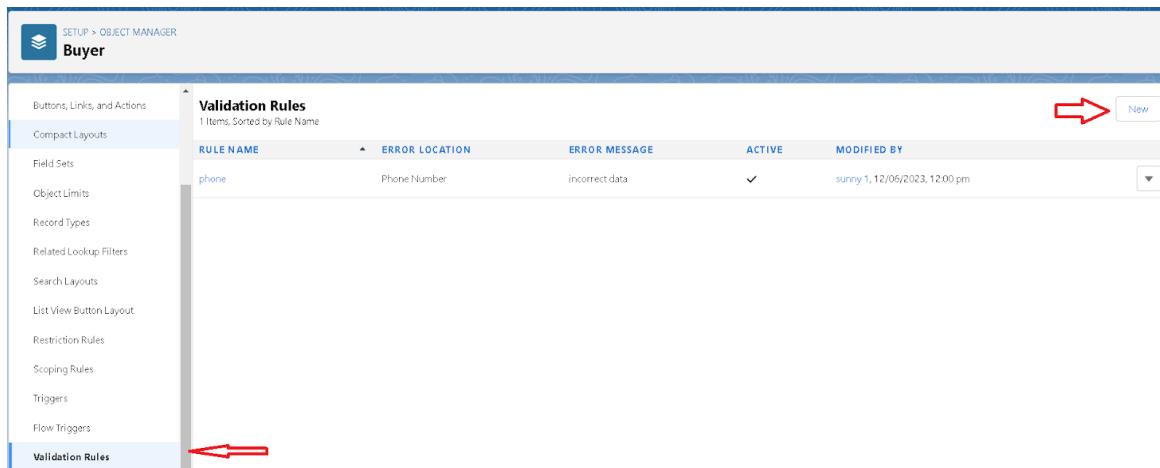
The screenshot shows the 'Step 2. Enter the details' page of the picklist creation wizard. The 'Field Label' is set to 'Vehicle type'. Under 'Values', the 'Enter values, with each value separated by a new line' option is selected, and a list of vehicle types ('Two Wheeler', 'Three Wheeler', 'Four Wheeler', 'Six Wheeler', 'Eight Wheeler', 'Others') is entered into the text area. A red box highlights this section. At the bottom, the 'Field Name' is set to 'Vehicle\_type' and the 'Description' field is empty. The 'Next' button is visible at the top right, with a red arrow pointing towards it.

Click Next.

- Next ? Next ? Save & New.
- Repeat the process 1 and 2 steps .
- 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.
- The values are : credit card, debit card, net banking, upi, cash.
- Click Next.
- Next ? Next ? Save & New.

## ► Creating the validation rule

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



- Enter the Rule name as “Phone ”.
- Insert the Error Condition Formula as :-
- NOT(REGEX( Phone\_Number\_c , "[6-9]{1}[0-9]{9}")).

**Validation Rule Edit**

Save | Save & New | Cancel

Rule Name: **phone**  Active

Description:

**Error Condition Formula**

Example: `Discount_Percent_c>0.30` More Examples...  
Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

**Insert Field** **Insert Operator**

**NOT (REGEX( Phone\_Number\_\_c , "[6-9](1)[0-9](9)") )**

Functions

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

**Insert Selected Function**

ABS(number)  
Returns the absolute value of a number, a number without its sign  
[Help on this function](#)

**Check Syntax** No errors found

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

**Error Message**

Example: Discount percent cannot exceed 30%

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

Error Message: **incorrect data**

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

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

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

## ► Creating Remaining Fields in Objects

- Firstly, check whether fields under object Fuel Details is created or not.

lending-1f-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01dL000002R7Nd/FieldsAndRelationships/view

Setup | Home | Object Manager

SETUP > OBJECT MANAGER  
**Fuel details**

Fields & Relationships					
FIELD LABEL		FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)			
Fuel details Name	Name	Auto Number			
Fuel Supplied	Fuel_Supplied__c	Number(5, 0)			
Gas Station	Gas_Station__c	Master-Detail(Gas Station)			
Last Modified By	LastModifiedById	Lookup(User)			
Supplier Name	Supplier__c	Master-Detail(Supplier)			

Then, check whether fields under object Supplier is created or not.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	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	Text(80)		

- Then, check whether fields under object Gas Station is created or not.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Fuel Available in bunk	Fuel_Available_in_bunk_c	Formula (Number)		
Fuel Price/litre	Fuel_Price_litre_c	Number(5, 0)		
Fuel supplied to bunk	Fuel_supplied_to_bunk_c	Roll-Up Summary (SUM Fuel details)		
Fuel used	Fuel_used_c	Roll-Up Summary (SUM Buyer)		
Gas Station	Name	Auto Number		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		

- Then, check whether fields under object Buyer is created or not.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid__c	Formula (Number)		
Buyer Name	Name	Auto Number		
Created By	CreatedById	Lookup(User)		
Customer Name	Customer_Name__c	Formula (Text)		
email	email__c	Email		
First Name	First_name__c	Text(5)		
Fuel filled in vehicle	Fuel_filled_in_vehicle__c	Number(18, 0)		
Gas Station name	Gas_Station_name__c	Master-Detail(Gas Station)		
Last Modified By	LastModifiedById	Lookup(User)		

## MILESTONE-6:PAGE LAYOUTS

"App Page Layout" refers to the configuration and design of an individual page within a Salesforce app. App Page Layouts determine the structure, appearance, and available features of a page in the app.

### ➤ creating the page layout

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

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Customer Layout	sunny 1, 08/06/2023, 3:05 pm	sunny 1, 12/06/2023, 4:00 pm

- Select the existing page layout, and give the page layout name as "customer layout", and 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: custom\_name

Page Layout Name: customer layout

**Save** **Cancel**

- Drag and drop the section field to Buyer details and create the section.
- Enter the section name as “Personal details”, ? click Ok.

SETUP > OBJECT MANAGER  
Buyer

Details  
Fields & Relationships  
**Page Layouts**  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

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

Information (Header visible on edit only)

- Buyer Name: GEN-2004-001234
- Gas Station name: Sample Text
- Fuel filled in vehicle: 57.502
- First Name: Sample Text
- Last Name: Sample Text
- Customer Name: Sample Text
- Amount Paid: 895.78
- Vehicle type: Sample Text
- Mode of payment: Sample Text
- Phone number: 1-415-555-1212
- Email: sarah.sample@company.com

System Information (Header visible on edit only)

- Created By: Sample Text
- Last Modified By: Sample Text

Custom Links (Header visible on edit only)

- Now drag the fields to this section that mentioned , they are First name , last name , customer name , phone number, email, Gas station name.
- Follow the same process for another two sections as shown above they are One section is “ vehicle info ” , drag the fields that are Fuel filled in vehicle, vehicle type.
- Another section is “Recepit details ”, and drag the fields that are Mode of payment , Amount paid.
- Then , Click save.

## **MILESTONE-7:PROFILES**

In Salesforce, a "Profile" is a collection of settings and permissions that define what a user can see and do within the Salesforce platform. Profiles control access to data, applications, and features, ensuring users have the necessary permissions to perform their job functions while maintaining the security and integrity of the data.

► Types of profiles in salesforce :

- **Standard profiles:**

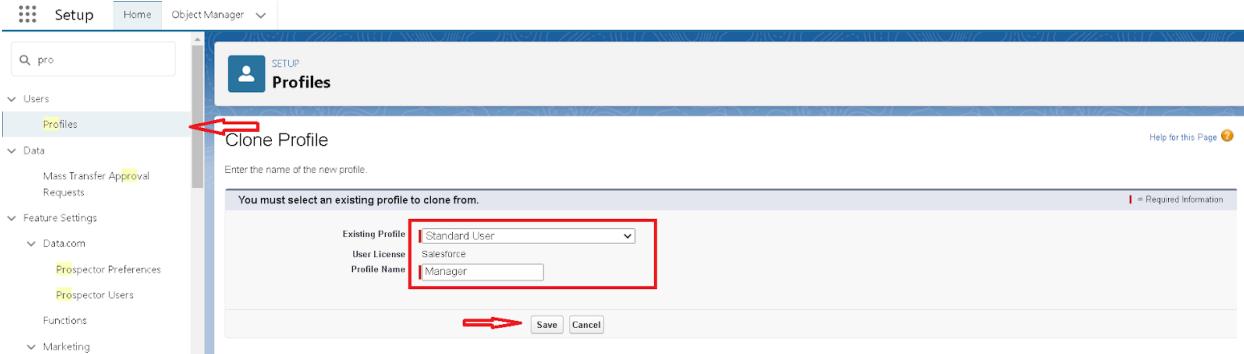
- By default salesforce provides below standard profiles.
- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.
- We cannot deleted standard ones
- Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

- **Custom Profiles:**

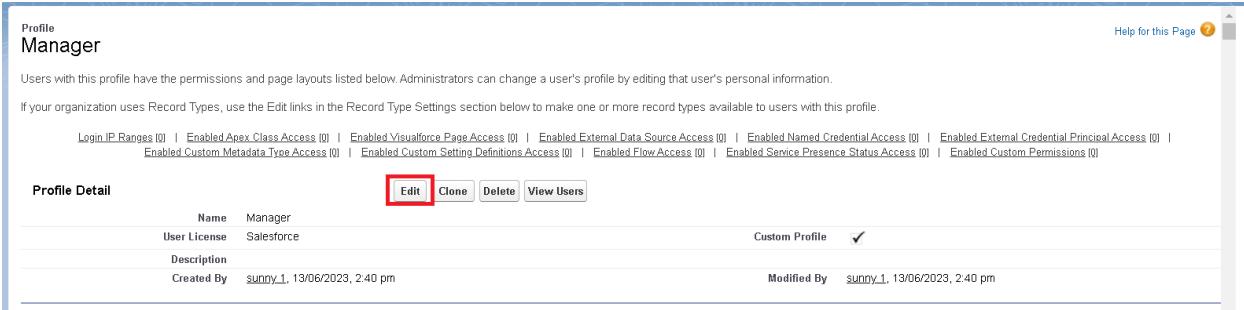
- Custom ones defined by us.
- They can be deleted if there are no users assigned with that particular one.

► **Manager Profile**

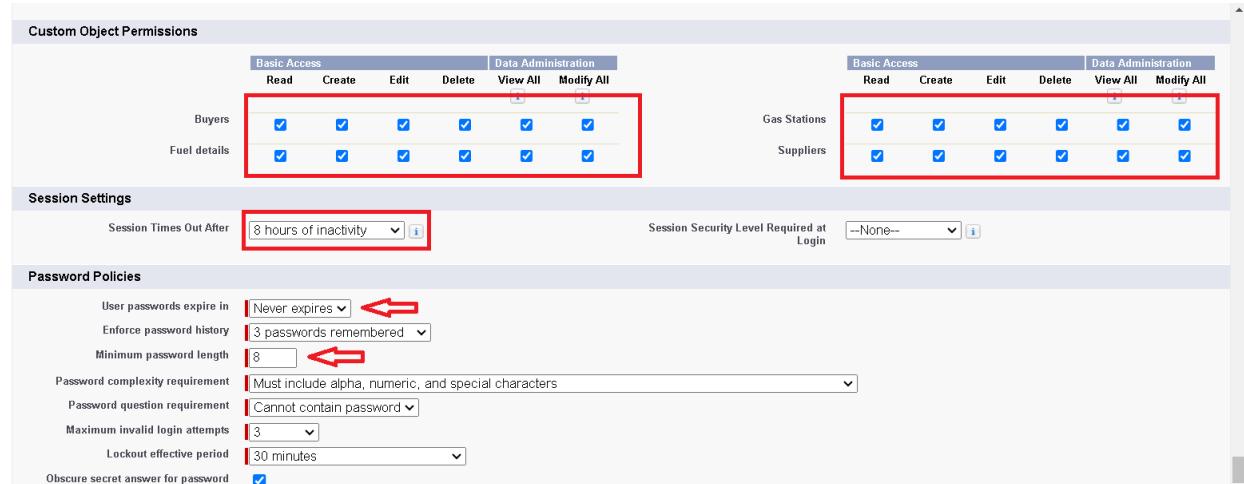
- Go to setup ? type profiles in quick find box ? click on profiles ? clone the desired profile (Standard User) ? enter profile name (Manager) ? Save.



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



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



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

## ► Sales executive Profile:

- 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.
- While still on the profile page, then click Edit.
- Select the Custom App settings as default for the Gas station.
- Scroll down to Custom Object Permissions and Give access permissions for Buyers, Fuel details , gas station and suppliers objects as mentioned in the below diagram.

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

- And click save.

## ► Sales person Profile:

- 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.
- While still on the profile page, then click Edit.
- Select the Custom App settings as default for the Gas station.
- Scroll down to Custom Object Permissions and Give access permissions for Buyers, Fuel details , gas station and suppliers objects as mentioned in the below diagram.

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

- And click save.

## **MILESTONE-8:ROLE AND ROLES HIERARCHY**

### **What is a Role:**

In Salesforce, a "Role" is a hierarchical position within an organization that defines a user's level of access to data based on their position in the hierarchy. Roles primarily control data visibility and access, especially in terms of record-level access. They are part of the Salesforce role hierarchy, which allows organizations to structure data access according to their organizational structure.

### **► Creating Manager Role:**

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

The screenshot shows the Salesforce Setup interface. In the left sidebar, under the 'Sales' category, the 'Roles' item is highlighted with a red box. The main content area displays a 'Sample Role Hierarchy' diagram. At the top is 'Executive Staff' (CEO, President, CFO, VP, Sales) with a note: 'View & edit data, roll up forecasts, & generate reports' and 'Can't access data of other Executive Staff'. Below it are three regional branches: 'Western Sales' (Director, Director of W. Sales), 'Eastern Sales' (Director, Director of E. Sales), and 'International' (Director, Director of Int'l Sales). Each branch has a note: 'View & edit data, roll up forecasts, & generate reports' and 'Can't access data of other users directly or at same level'. Under each branch are 'Sales Rep' and 'SALES REP' roles. A red box highlights the 'Set Up Roles' button at the bottom right of the page.

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

The screenshot shows the 'Your Organization's Role Hierarchy' page. At the top, there are 'Collapse All' and 'Expand All' buttons. The tree view shows a hierarchy starting with 'Nick Enterprises', followed by 'Add Role', 'CEO', 'HR', 'Manager', 'On Site Emp', and 'Remote Emp'. Under 'Manager', there is another 'Add Role' button. A red box highlights this second 'Add Role' button. Each node has 'Edit | Del | Assign' links.

- Give Label as “Manager” and Role name gets auto populated.

Role Edit

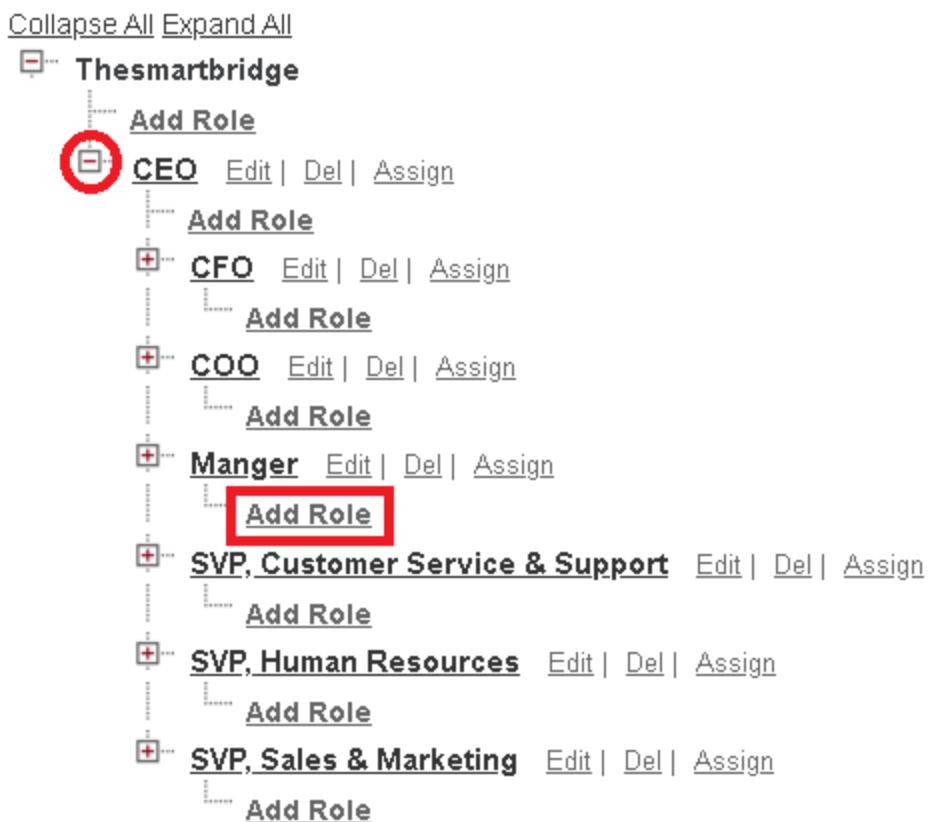
Label	Manger	
Role Name	Manger	
This role reports to	CEO	
Role Name as displayed on reports		
<input type="button" value="Save"/> <input type="button" value="Save &amp; New"/> <input type="button" value="Cancel"/>		

Then click on Save.

### ► Creating another roles:

#### Creating another two roles under manager :

- Make sure to create labels as Sales Executive and Sales Person.
- Go to quick find ? Search for Roles ? click on set up roles.
- Click plus on CEO role, and click add role under manager.



- Give Label as “sales executive” and Role name gets auto

populated. Then click on Save.

Role Edit  
New Role

Help for this Page

Role Edit

Label

Role Name

This role reports to

Role Name as displayed on reports

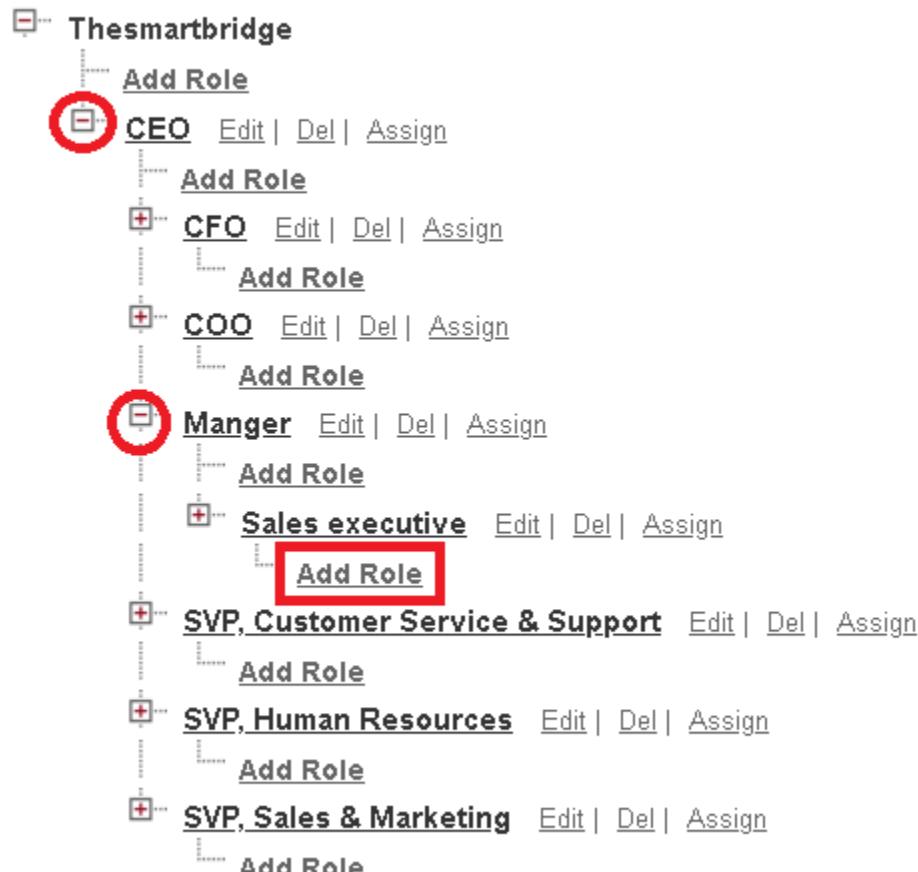
Save Save & New Cancel

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

#### Your Organization's Role Hierarchy

[Collapse All](#)

[Expand All](#)



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

## **MILESTONE-9:USERS**

### **What is an User:**

In Salesforce, a "User" refers to an individual who has a Salesforce account and can log in to access the Salesforce environment. Each user is associated with a specific license and is assigned various roles, profiles, and permissions that determine what they can see and do within Salesforce.

### **► Create User:**

- Go to setup ? type users in quick find box ? select users ? click New user.
- Fill in the fields
- First Name : Niklaus
- Last Name : Mikaelson
- Alias : Give a 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

New User

User Edit      Save      Save & New      Cancel

General Information

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

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

Marketing User      Offline User      Knowledge User      Flow User      Service Cloud User

Site.com Contributor User      Site.com Publisher User      WDC User      Data.com User Type: --None--

- Then click on Save.

### ► creating another users:

For creating another users, Name of our choice can be assigned, but make sure User 1 should be created with

- Role : sales executive
- User licence : Salesforce Platform
- Profile : sales executive

User 2 should be created with

- Role : sales person
- User licence : Salesforce Platform
- Profile : sales person

**All Users**

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app [Let's Go](#).

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty_00000000000000000000000000000000@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Mikaelsen_Niklaus	nmika	swethakankala6841@gmail.com	Manager	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	Swetha_Kankala	ksweet	swethakankala6841@gmail.org		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Thakur_Aaruhि	atthak	aaruhihavur123@gmail.com	Sales person	<input checked="" type="checkbox"/>	sales person
<input type="checkbox"/>	Thapa_Himani	htthaq	hemajiththaqa123@gmail.com	Sales executive	<input checked="" type="checkbox"/>	sales executive
<input type="checkbox"/>	User_Integration	integ	integration@00000000000000000000000000000000.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00000000000000000000000000000000.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

## MILESTONE-10:PERMISSION SETS

### What is 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:

- Go to setup ? type “permission sets” in quick search ? select permission sets ? New.

**Permission Sets**

On this page you can create, view, and manage permission sets.

In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download Salesforce from the App Store or Google Play: [iOS](#) | [Android](#)

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

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

Enter permission set information

Label: P1

API Name: P1

Description: additional access for sales executive profile

Session Activation Required:  [?](#)

**Save** **Cancel**

| = Required Information

- Under Apps Select object settings.

**Assigned Apps**  
Settings that specify which apps are visible in the app menu

**Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu

**Object Settings**  
Permissions to access objects and fields, and settings such as tab availability

**App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"

**Apex Class Access**  
Permissions to execute Apex classes

**Visualforce Page Access**  
Permissions to execute Visualforce pages

**External Data Source Access**  
Permissions to authenticate against external data sources

**Flow Access**  
Permissions to execute Flows

**Named Credential Access**  
Permissions to authenticate against named credentials

**Custom Permissions**  
Permissions to access custom processes and apps

**Custom Metadata Types**  
Permissions to access custom metadata types

**Custom Setting Definitions**  
Permissions to access custom settings

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

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"/> i

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"/>

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

All Users ▾

1 item selected

Full Name	Alias	Username	Role	Active	Profile
abd c	ac	ab@cdt.com	Sales executive	<input checked="" type="checkbox"/>	sales executive
Astro Nomical	anomi	astronomicalsecurity.2vhahccacrda.juzh67mibr0rgsa8l1dhzd@smart.com		<input type="checkbox"/>	Force.com - Free User
Brochan Pane	bpane	bpane.kh061622.nvopq5ltd9yi.cwkqyhudbsxb@smart.com		<input type="checkbox"/>	Break Glass Administrator
Chatter Expert	Chatter	chatty.00d5i00000dpzofeadnb26j1owcvnq@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Cirrus Cash Flow	cirr	cirrus@cashflow.com		<input type="checkbox"/>	System Administrator

Cancel | Next

- 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**

### **What is setup for OWD mean:**

Organizational Wide Defaults (OWD) in Salesforce define the baseline level of access to records for all users in the organization. This setting specifies the default sharing settings for different objects (such as Accounts, Contacts, Opportunities, etc.) and is used to restrict access to data at the most restrictive level. After setting OWD, you can grant additional access through roles, sharing rules, teams, and manual sharing.

### **► Create OWD Setting:**

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

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The left sidebar has a search bar with 'sharing' typed in. Below it, under 'Security', there are links for 'Guest User Sharing Rule Access Report' and 'Sharing Settings'. A red arrow points to the 'Sharing Settings' link. The main content area is titled 'Sharing Settings' and contains a table for 'Default Sharing Settings'. The table has columns for 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. The 'Edit' button is highlighted with a red box. The table rows show settings for Lead, Account and Contract, Contact, Order, and Asset. The 'Default Internal Access' column includes options like 'Public Read/Write/Transfer', 'Public Read/Write', 'Controlled by Parent', and 'Controlled by Child'. The 'Default External Access' column includes 'Private' and 'Controlled by Parent'. The 'Grant Access Using Hierarchies' column has checked boxes.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓

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

The screenshot shows a portion of the Salesforce setup interface under 'Sharing Settings'. It displays a list of objects (Work Plan Template, Work Step Template, Work Type, Work Type Group, Gas Station, Supplier) with their sharing levels. The 'Sharing Settings' dropdown is open, showing 'Public Read Only' and 'Public Read/Write' as options. The 'Public Read Only' option is selected and highlighted with a red box. At the bottom, there are buttons for 'Save' and 'Cancel', with 'Save' also highlighted with a red box.

- 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.

The screenshot shows the 'Sharing Settings' page in the Salesforce setup. The page title is 'Sharing Settings'. It includes a search bar and navigation links for Setup, Home, and Object Manager. A sidebar on the left shows a 'Sharing' section with 'Sharing Rule Access Report' and 'Sharing Settings' selected. The main content area displays a table of 'Default Sharing Settings' for various objects. The 'Edit' button in the top right corner of the table is highlighted with a red box. The 'Organization-Wide Defaults Help' link in the top right corner of the table is also highlighted with a red box.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓

- The overall page for Setup for OWD looks as mentioned above.

## MILESTONE-12:USER ADOPTION

### What is User Adoption:

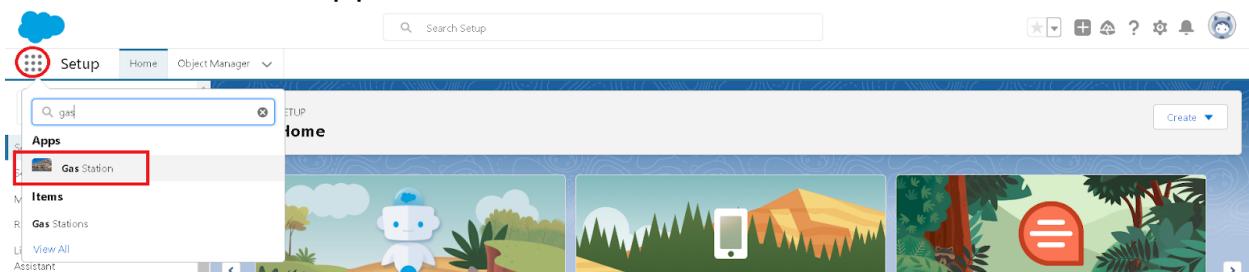
User adoption is a critical factor in the success of a Salesforce implementation. It ensures that users are effectively utilizing the

system, which in turn helps to achieve business goals and maximize the return on investment.

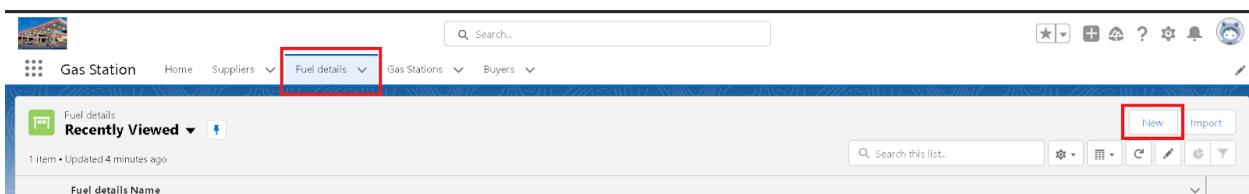
### ► create a record:

To create a record in junction object follow these steps

- Click on the app launcher locate at left side of the screen.



- Search for " Gas station" and click on it.



- Click on " fuel details tab".
- 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 ".

A screenshot of the 'New Fuel details' creation form. The title bar says 'New Fuel details'. Below it is a section titled 'Information'. In this section, there's a field for 'Fuel details Name'. Underneath it, there's a field for 'Supplier name' with a dropdown menu titled 'Search Suppliers...'. The dropdown menu shows 'Recent Suppliers' with 'Indian Oil' listed. Below the dropdown is a 'New Supplier' button, which has a red arrow pointing to it. At the bottom of the form are three buttons: 'Cancel', 'Save & New', and 'Save'.

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

New Supplier

Information

\* supplier Name: HP

Owner: sunny 1

Cancel Save & New **Save**

- 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

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

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

- Fill the remaining details in fuel detail record , and click save.
- Make sure to create other records for better view.

#### ► View a record:

- To create a record in junction object follow these steps :

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

Related **Details**

Fuel details Name  
Fuel-002

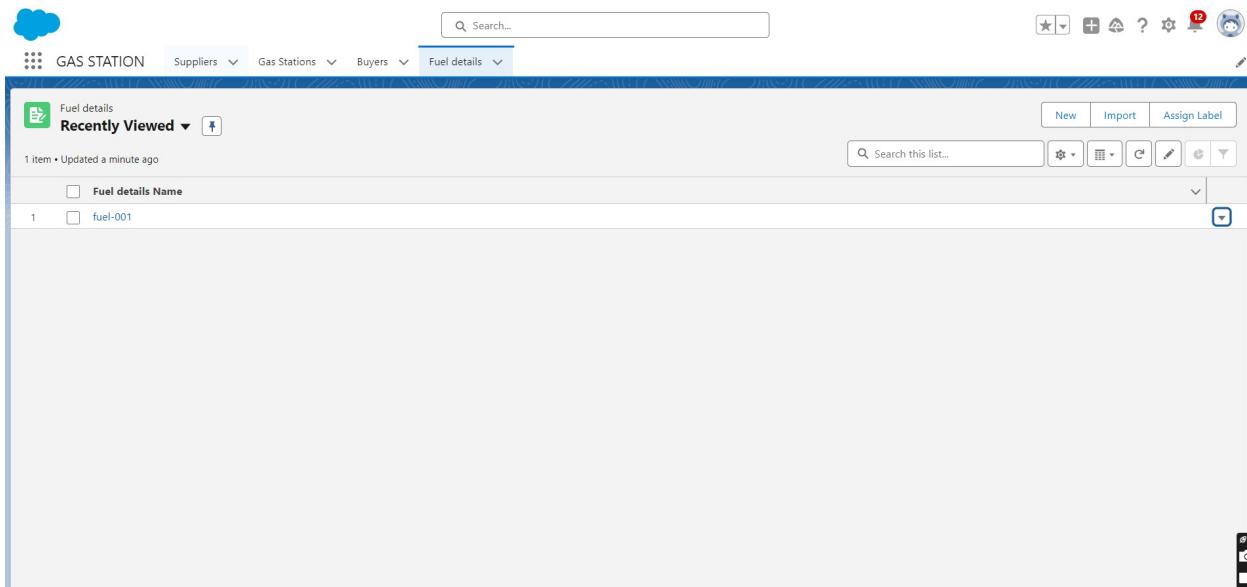
Supplier name  
[HP](#)

Fuel supplied  
80,000

Gas Station  
[Gas-002](#)

### ➤ Delete a record:

- To create a record in junction object follow these steps :
- Click on the app launcher locate at left side of the screen.
- Search for “ Gas station” and click on it.
- Click on “ fuel details tab”.
- Click on Arrow at right hand side on that Particular record.



- Click delete and delete again.

- only the undeleted records can be viewed.

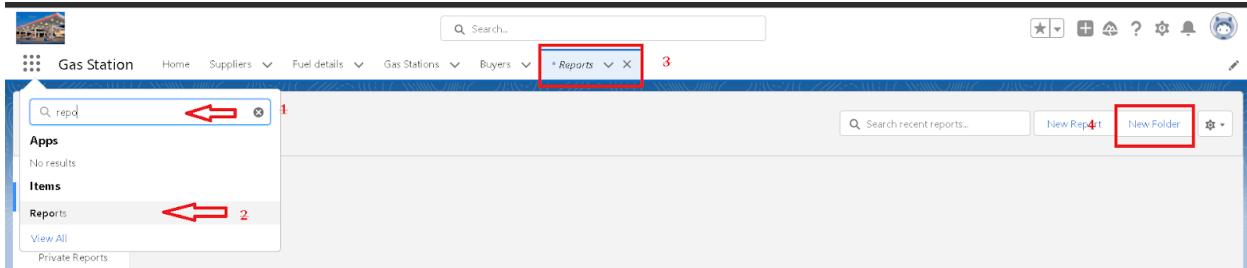
## **MILESTONE-13:REPORTS**

### **What are Reports:**

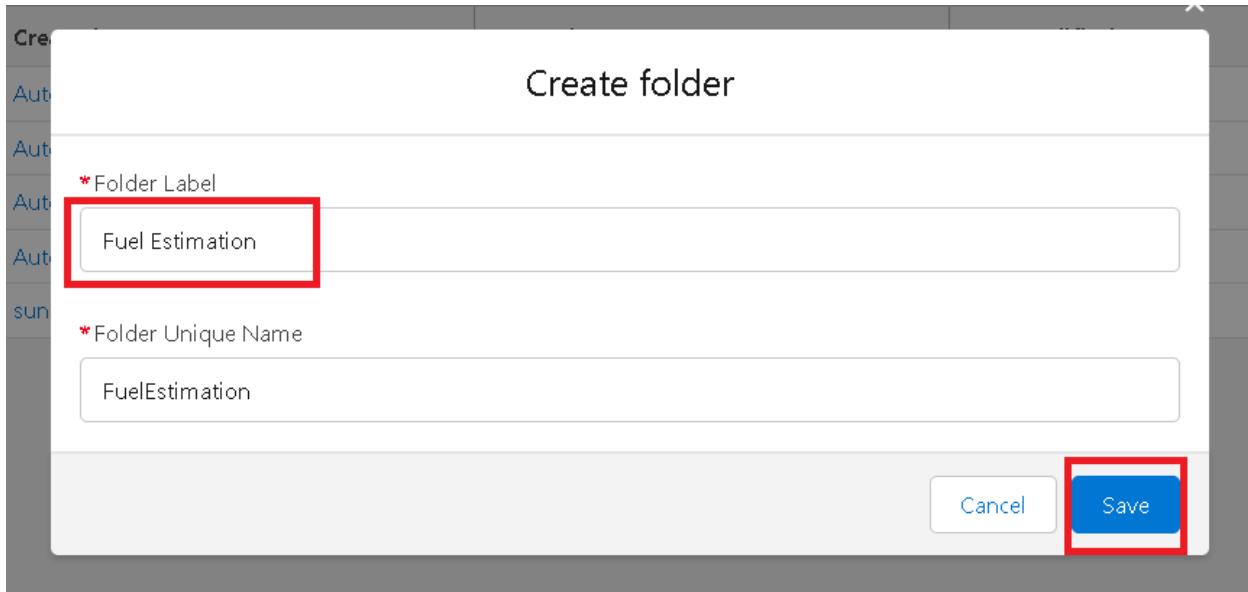
Reports in Salesforce are powerful tools that allow users to organize, analyze, and visualize their data. Salesforce reports help users make informed business decisions by providing insights into sales performance, customer behavior, operational efficiency.

#### **► create a report folder:**

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



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



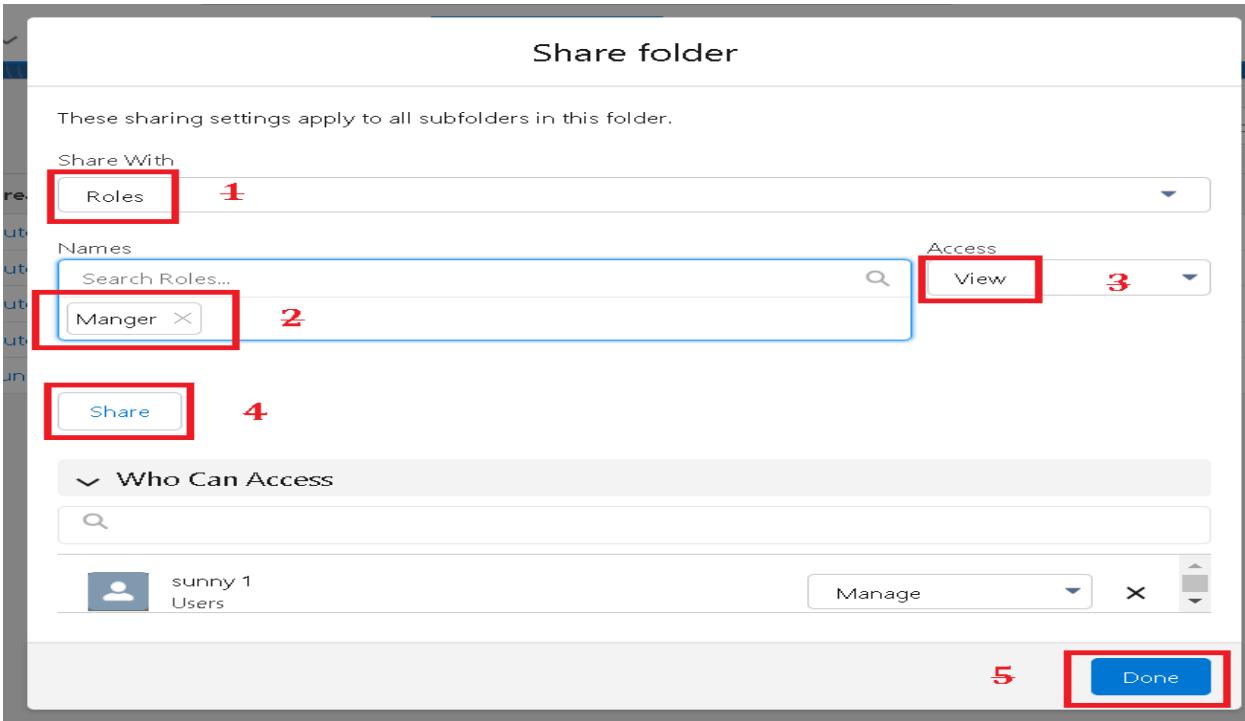
## ► Sharing a report folder:

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

	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	Einstein Bot Reports	Automated Process	3/9/2024, 11:18 am	Automated Process	3/9/2024, 11:18 am
Created by Me	Einstein Bot Reports Spring '23	Automated Process	3/9/2024, 11:18 am	Automated Process	3/9/2024, 11:18 am
Private Reports	Einstein Bot Reports Summer '23	Automated Process	3/9/2024, 11:18 am	Automated Process	3/9/2024, 11:18 am
Public Reports	Einstein Bot Reports Summer '22	Automated Process	3/9/2024, 11:18 am	Automated Process	3/9/2024, 11:18 am
All Reports	Einstein Bot Reports Winter '23	Automated Process	3/9/2024, 11:18 am	Automated Process	3/9/2024, 11:18 am
FOLDERS	Enablement Dashboard Reports Spring '24	Automated Process	3/9/2024, 11:18 am	Automated Process	3/9/2024, 11:18 am
All Folders	Enablement Dashboard Reports Summer '24	Automated Process	3/9/2024, 11:18 am	Automated Process	3/9/2024, 11:18 am
Created by Me	Fuel Estimation	Kanakala Swetha	8/9/2024, 3:37 pm	Kanakala Swetha	8/9/2024, 3:37 pm
Shared with Me					

- Select the share with as “roles”, in name field search for “manager”, give “view” as access for that role.

- Then click share, and click on Done.



## ► Create Report:

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

The screenshot shows the 'Reports' page. At the top, there's a navigation bar with icons and a 'Reports' tab (highlighted with a red box). Below the navigation is a search bar with 'Search...' and a 'New Report' button (highlighted with a red box). On the left, there's a sidebar with 'RECENT' and 'FOLDERS' sections. The main area shows a table of reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. Two reports are listed: 'Employee's working on projects report' and 'Assets assigned to Employees'.

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

Create Report

Category

Recently Used

All

- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contracts and Orders
- Price Books, Products and Assets

Select a Report Type

Report Type Name Category

Suppliers with Fuel details and Gas Stations	Standard
Gas Stations	Standard
<b>Gas Stations with Buyers</b>	<b>Standard</b>
Gas Stations with Fuel details and Suppliers	Standard
Gas Station History	Standard
Gas Stations with Buyers with Fuel details	Custom

Details

**Gas Stations with Buyers**  
Standard Report Type

Start Report

Fields (32)

Created By You  
No Reports Yet

Created By Others  
No Reports Yet

Objects Used in Report Type  
Buyer

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

REPORT ▾

New Gas Stations with Buyers Report Gas Stations with Buyers

Fields >

Groups

Add group...  2

Fuel Available in bunk

Columns

Add column...  4

Customer name

# Fuel filled in vehicle

# Amount Paid

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

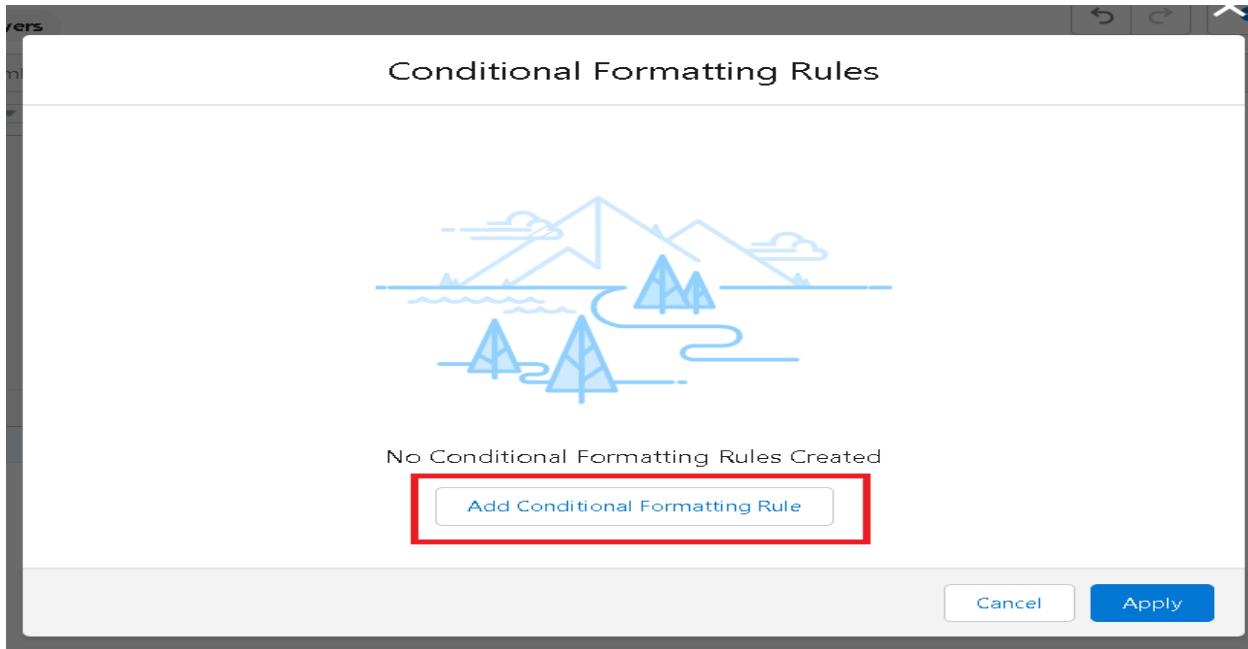
Update Preview Automatically

Fuel Available in bunk	Customer name	Fuel filled in vehicle	Amount Paid
2,18,00 (7)	sumy bunny	70	₹6,720.00
	bunny g	15	₹1,440.00
	upadhye shivam	70	₹6,720.00
	sandeep gujja	7	₹672.00
	drug dealer	2,000	₹19,200.00
	sasuke uchiha	50	₹4,800.00
	naruto uzumaki	70	₹6,720.00
	<b>Subtotal</b>		₹21,972.00
	<b>Total (7)</b>		₹21,972.00

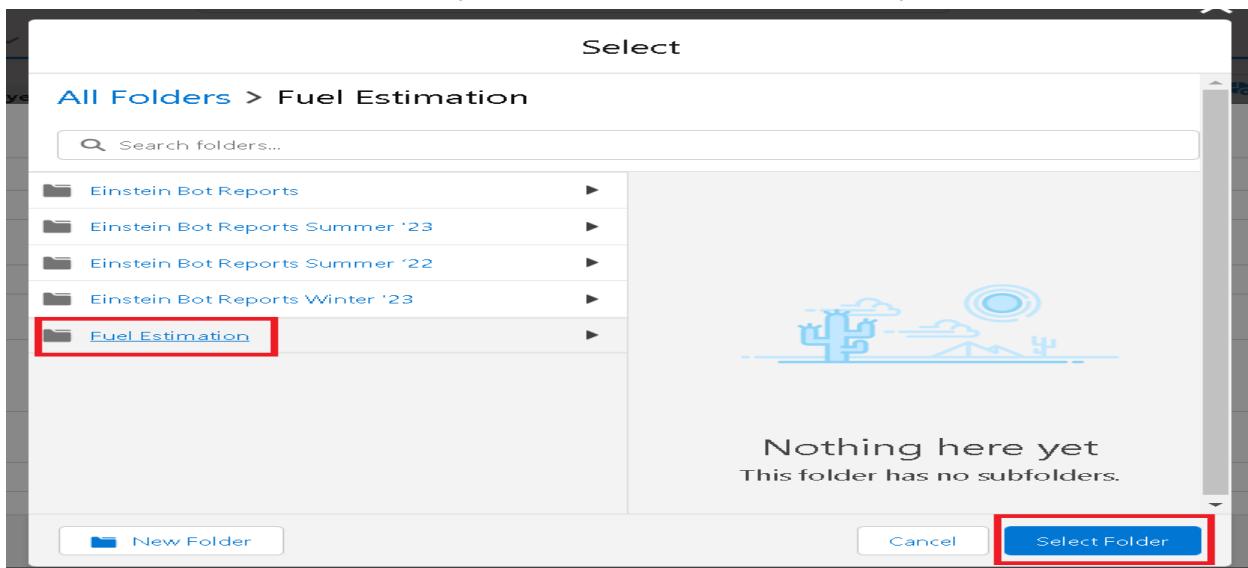
Row Counts  Detail Rows  Subtotals  Grand Total

3 Conditional Formatting

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



- Change the apply conditional formatting to “ sum of Amount paid”.
- Mention the range form “ 1000 to 5000 ”.
- Dont change the colours, and click on Done.
- Click apply.
- Click save, give the report name as “Amount range”, report unique name will be auto populated.
- Click on select folder, select “ Fuel estimation” , click select folder



- Click save.

- Then the created Report is viewed.

The screenshot shows the Salesforce Reports interface. At the top, there's a navigation bar with links for GAS STATION, Suppliers, Gas Stations, Buyers, Fuel details, Reports, and a search bar labeled 'Search...'. On the right side of the header are various icons for filtering, saving, and sharing. Below the header, the main area is titled 'Reports' and 'Recent'. It shows a table with one item: 'Amount range' under 'Report Name', 'Fuel Estimation' under 'Folder', 'Kanakala Swetha' under 'Created By', and '8/9/2024, 3:46 pm' under 'Created On'. To the left of the table is a sidebar with sections for 'Reports' (Recent, Created by Me, Private Reports, Public Reports, All Reports), 'Folders' (All Folders, Created by Me, Shared with Me), and 'Favorites' (All Favorites). There are also buttons for 'New Report' and 'New Folder'.

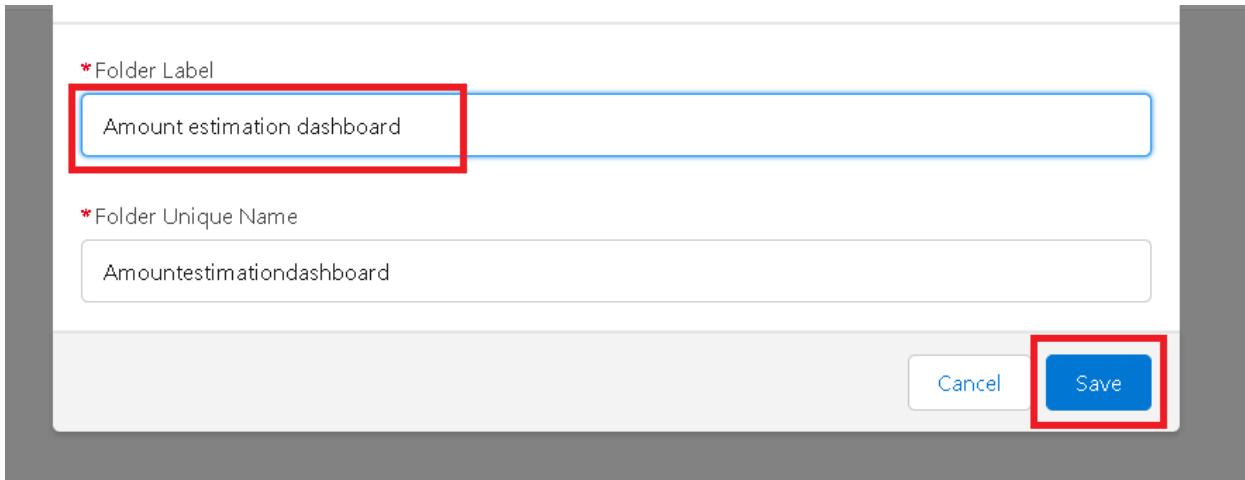
## MILESTONE-14:DASHBOARDS

### **What is a Dashboard:**

Dashboards in Salesforce are visual representations of data from reports, providing a snapshot of key metrics and performance indicators in a consolidated view. Dashboards help users and executives quickly understand data trends and make informed decisions. They are highly customizable and can be tailored to display the most relevant information for different roles and departments.

### **► Create Dashboard Folder:**

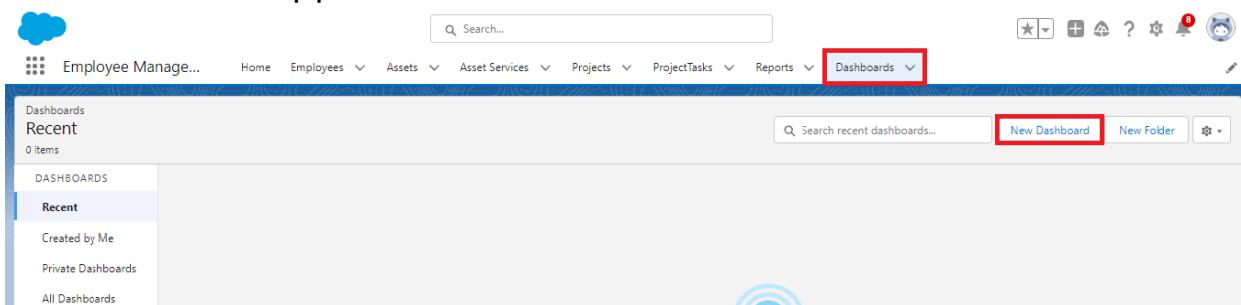
- Click on the app launcher and search for dashboard.
- Click on dashboard tab.
- Click new folder, give the folder label as "Amount estimation dashboard".



- Folder unique name will be auto populated.
- Click save.
- Follow the same steps, from milestone 12, and activity 2, and provide the sharing settings for the folder that just created.

## ► Create Dashboard:

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



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

New Dashboard

\* Name  
Estimation amount

Description

Folder  
Amount estimation dashboard

Select Folder

Create

- Select add component.

- Select a Report and click on select.

Select Report

**Reports**

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

**Folders**

- Created by Me
- Shared with Me

Select Report

Search Reports and Folders...

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

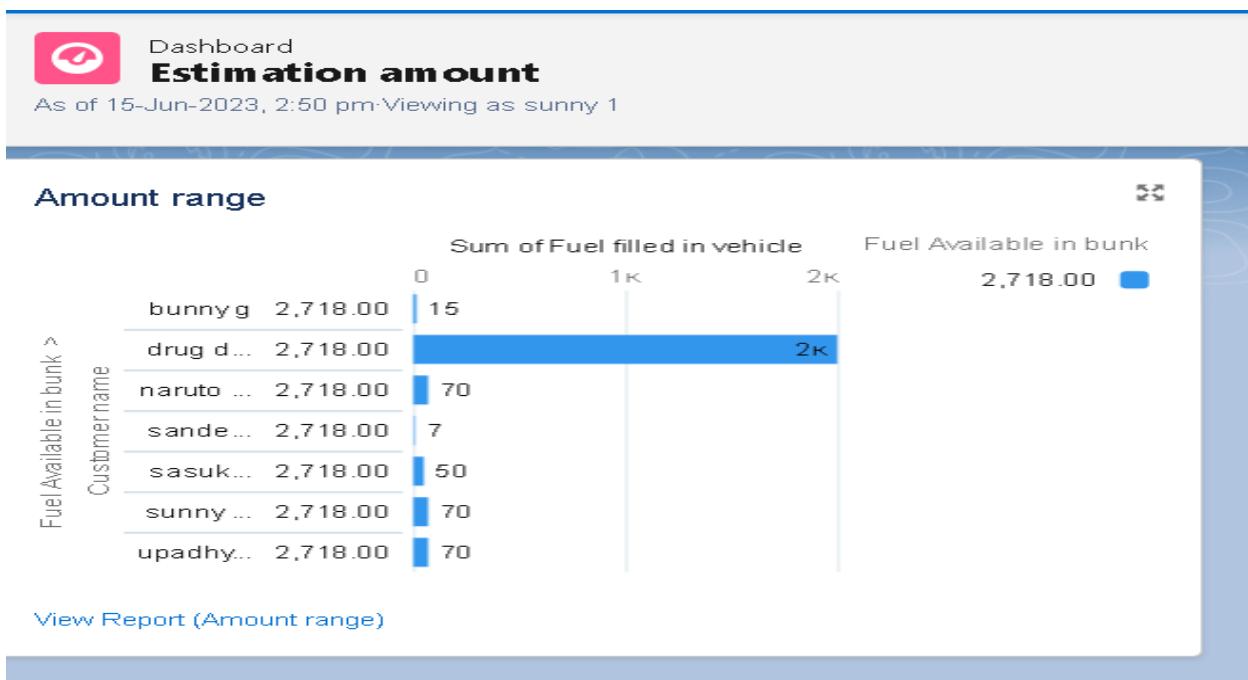
Sample Flow Report Screen Flows  
Automated Process - 16-May-2023, 8:59 am - Public Reports

Cancel Select

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

The screenshot shows a Salesforce Lightning dashboard titled "Estimation amount". The URL in the browser is "lendiorg-1f-dev-ed.lightning.force.com/lightning/o/Dashboard/home?queryScope=mrn". The dashboard has a header with a search bar and various navigation links: "Suppliers", "Gas Stations", "Buyers", "Fuel details", "Reports", and "Estimation amount". A sidebar on the left lists categories like "Dashboards", "Recent", "Created by Me", "Private Dashboards", "All Dashboards", "Folders", "All Folders", "Created by Me", "Shared with Me", "Favorites", and "All Favorites". The main content area displays a table with one row for the "Estimation amount" dashboard, showing it was created by Kanakala Swetha on 8/9/2024 at 3:59 pm. There is also a "New Dashboard" button.

- Providing the date, the preview is shown as mentioned below:



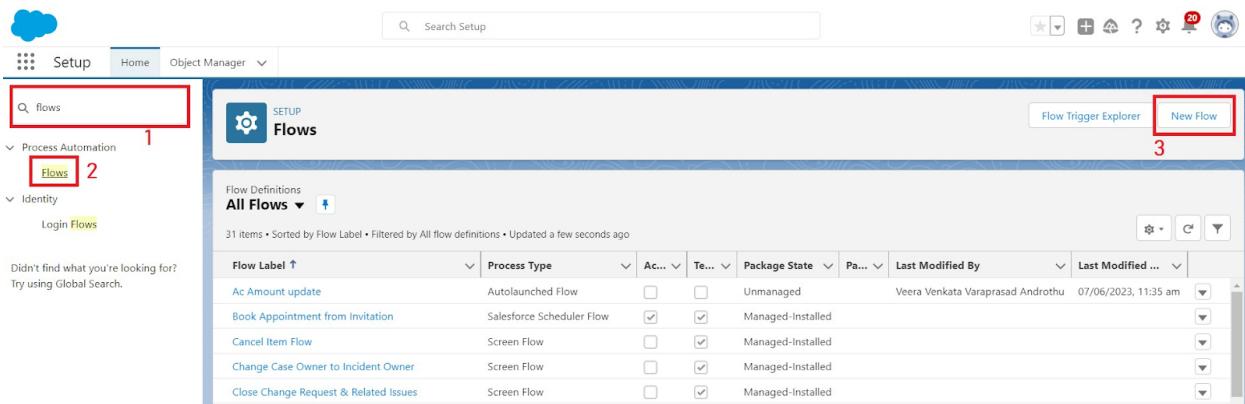
## MILESTONE-15: FLOWS

### What Flows mean:

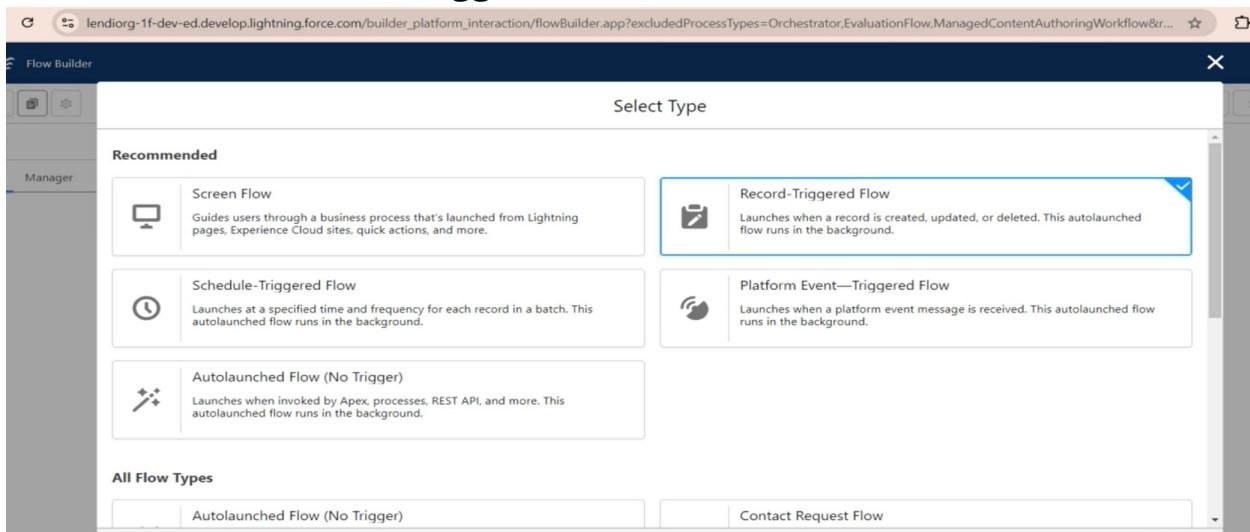
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

#### ► Create a Flow:

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

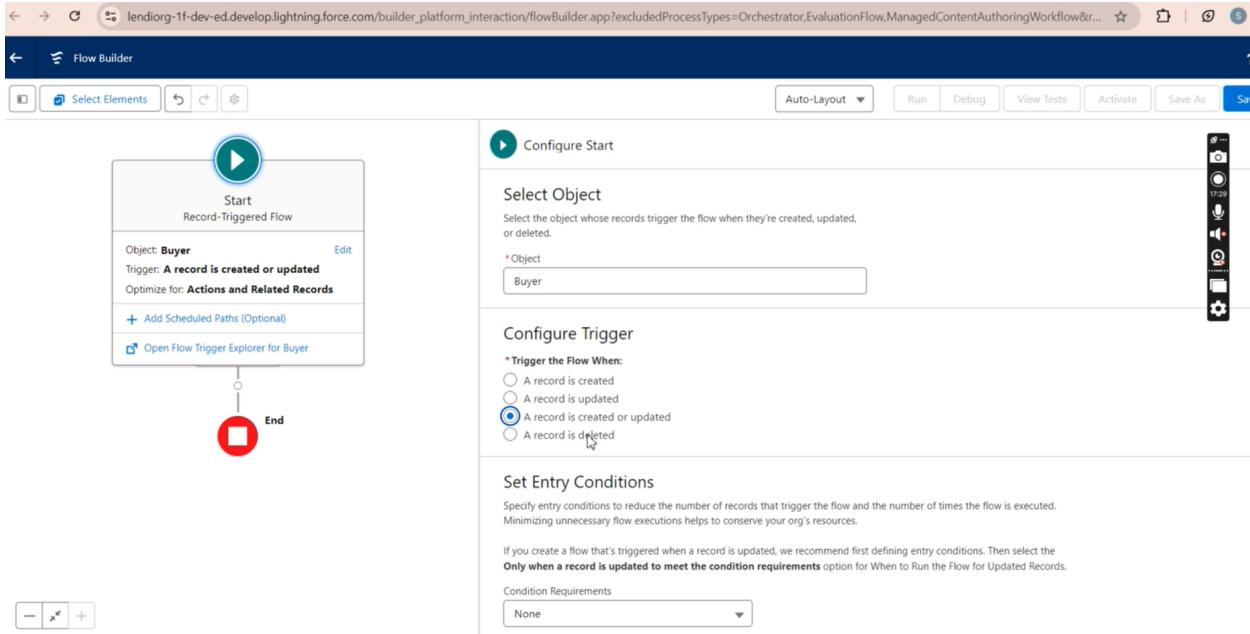


- Select the Record-triggered flow and Click on Create.



- Select the Object as a “buyer” in the Drop down list.

- Select the Trigger Flow when: “A record is Created or Updated”.
- Select the Optimize the flow for: “Actions and Related Records” and Click on Done



- Now change the mode from Auto-layout to free-form.
- Now select the manger option in toolbox, click New resource.
- Select the resource type as text template.
- Enter the API name as “ emailbody”.
- In body field paste the syntax that given below.

Hello {!\$Record.Customer\_name\_c},

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

#### RECEPIT DETAILS :

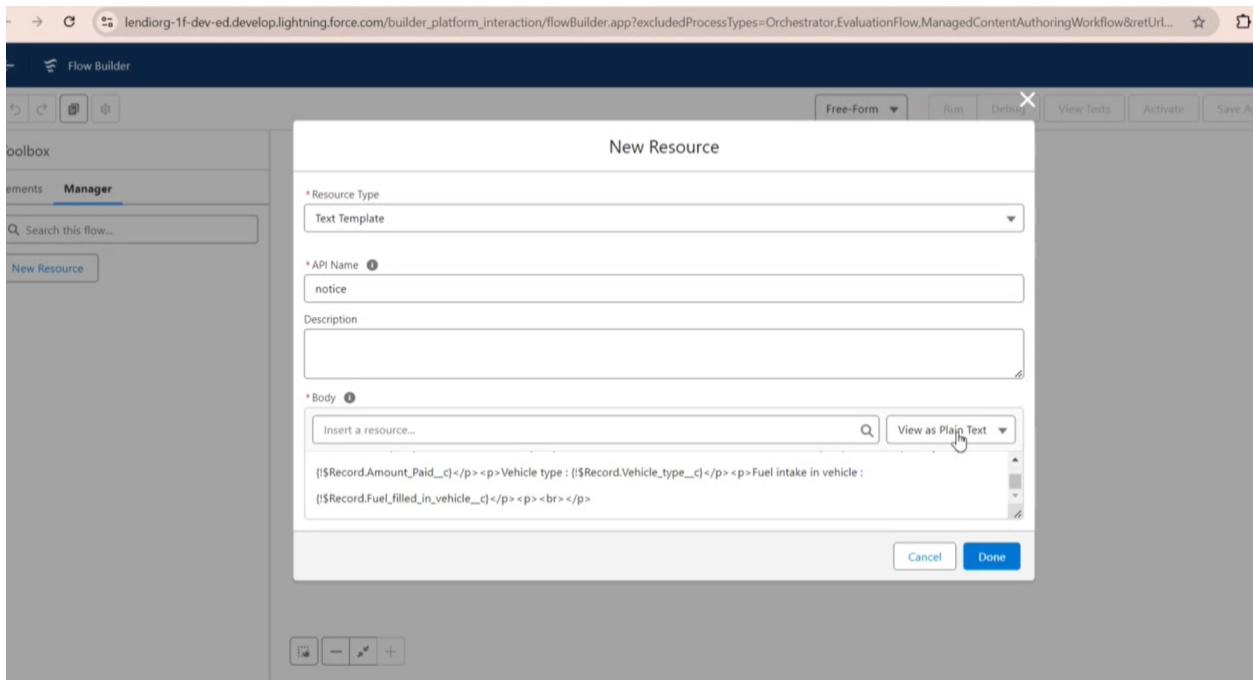
Customer name : {!\$Record.Customer\_name\_c}

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

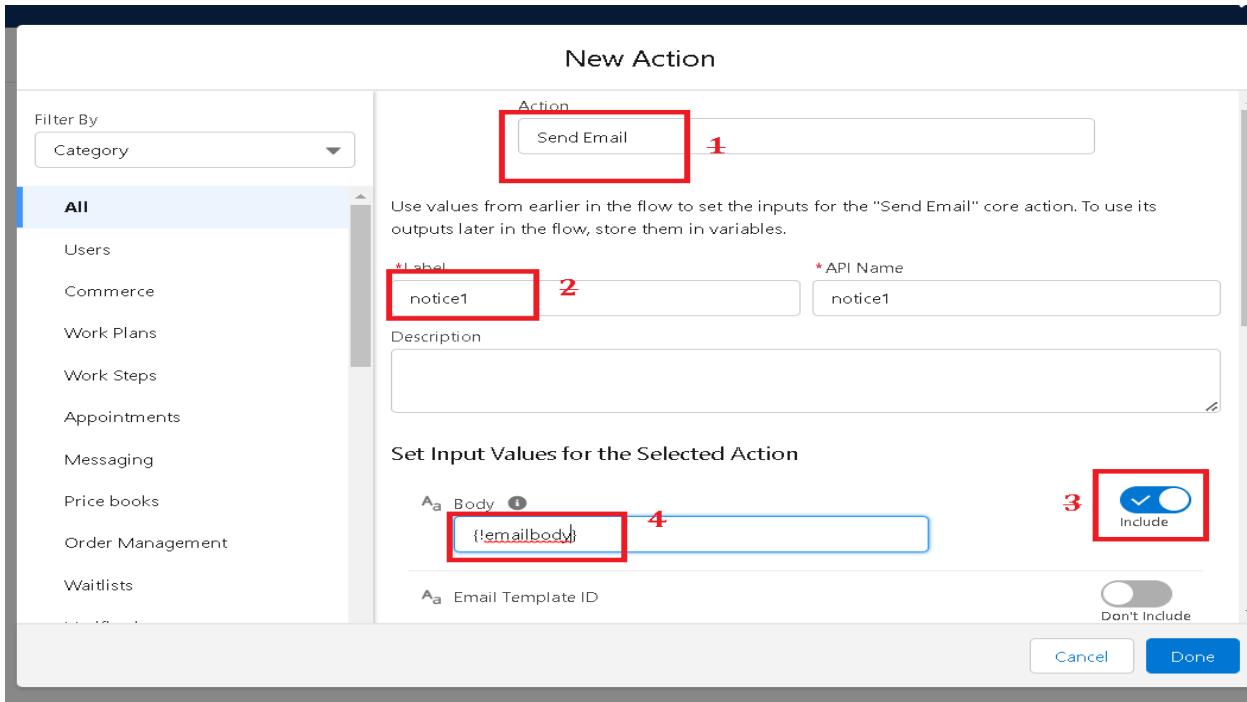
Vehicle type : {!\$Record.Vehicle\_type\_c}

Fuel intake in vehicle : {!\$Record.Fuel\_filled\_in\_vehicle\_c}

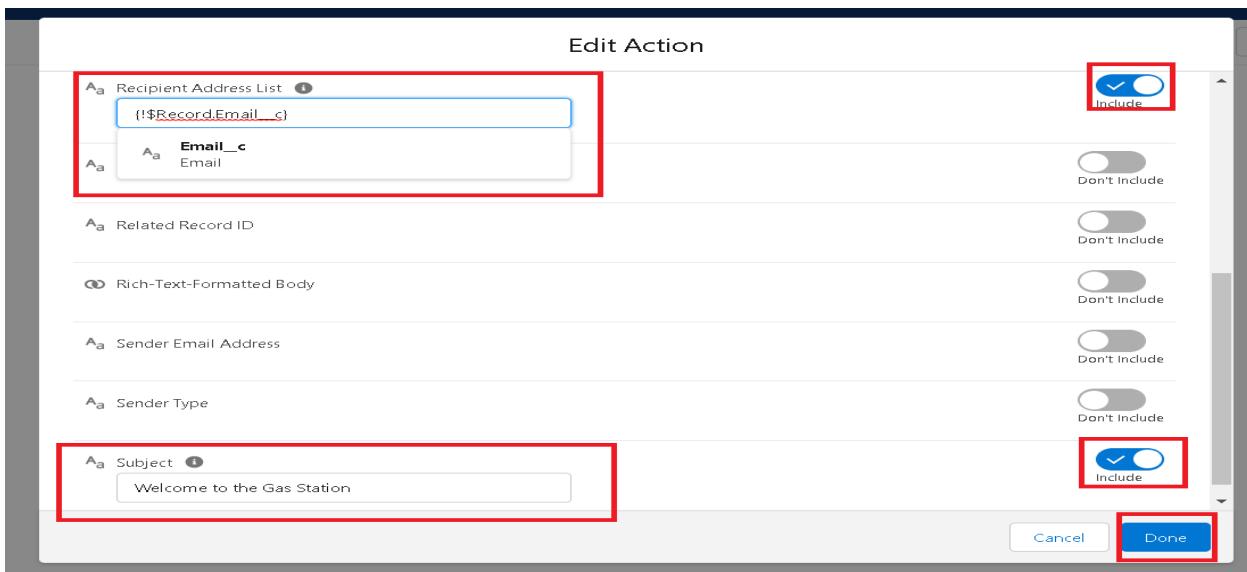
- Change the view as Rich Text ? View to Plain Text.



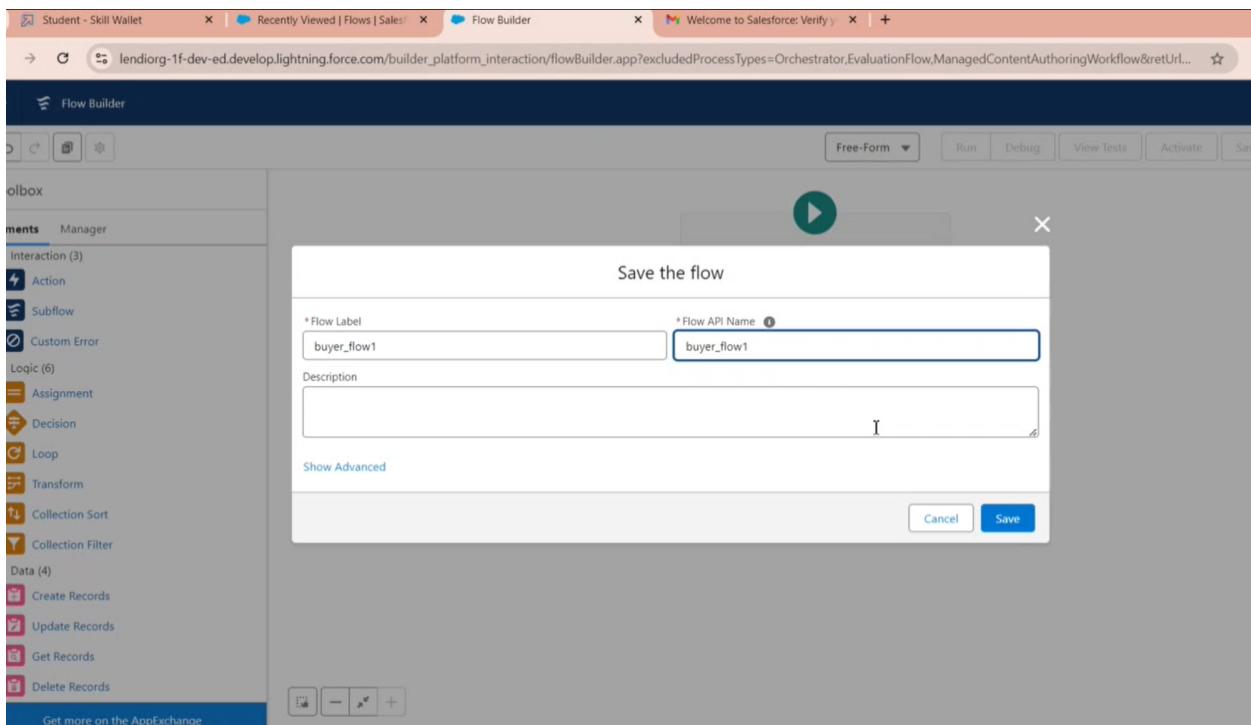
- Click done.
- Now click on elements, and drag the action element into the preview pane.
- Their action bar will be opened in that search for “ send email ” and click on it.
- Give the label name as “ notice”
- API name will be auto populated.
- Enable the body in set input values for the selected action.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



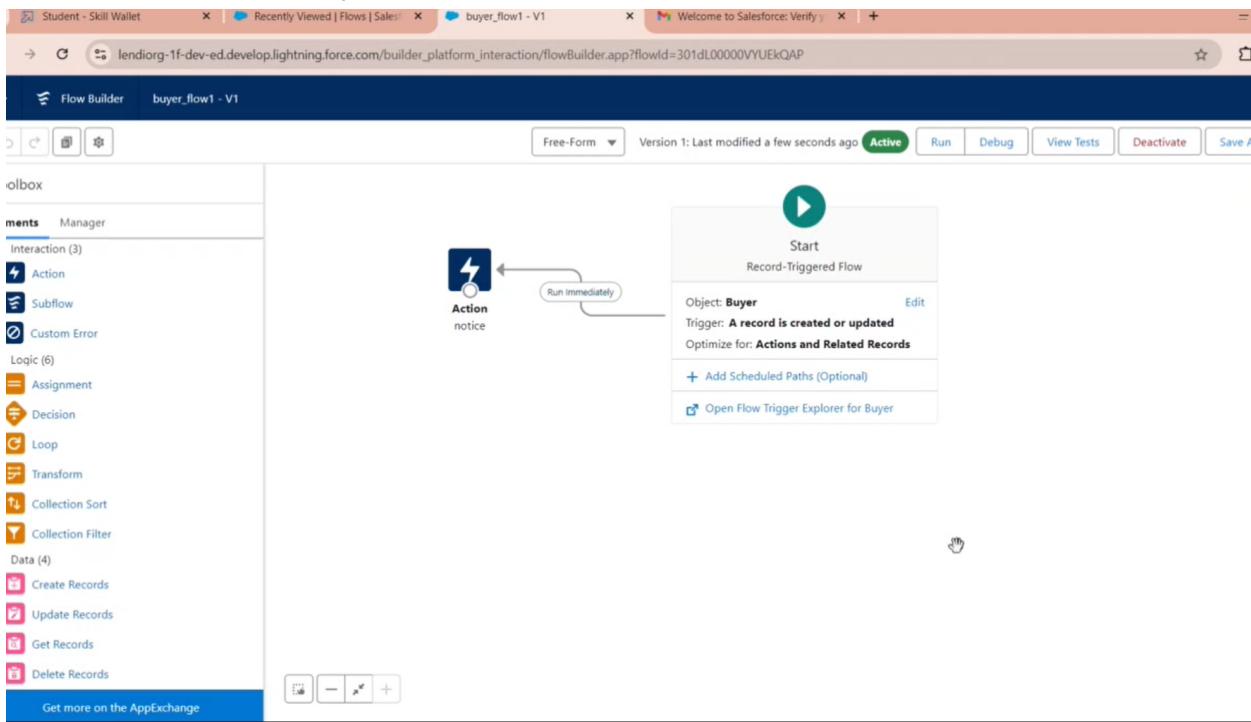
- Include recipient address list select the email form the record.
- Include subject as “ welcome to gas station”.
- Click done



- Now drag the path form the start to action element.
- Click on save. Give the Flow label , Flow Api name will be autopopulated.



- And click save, and click on activate.



- This process completes the creation of Flows.