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.

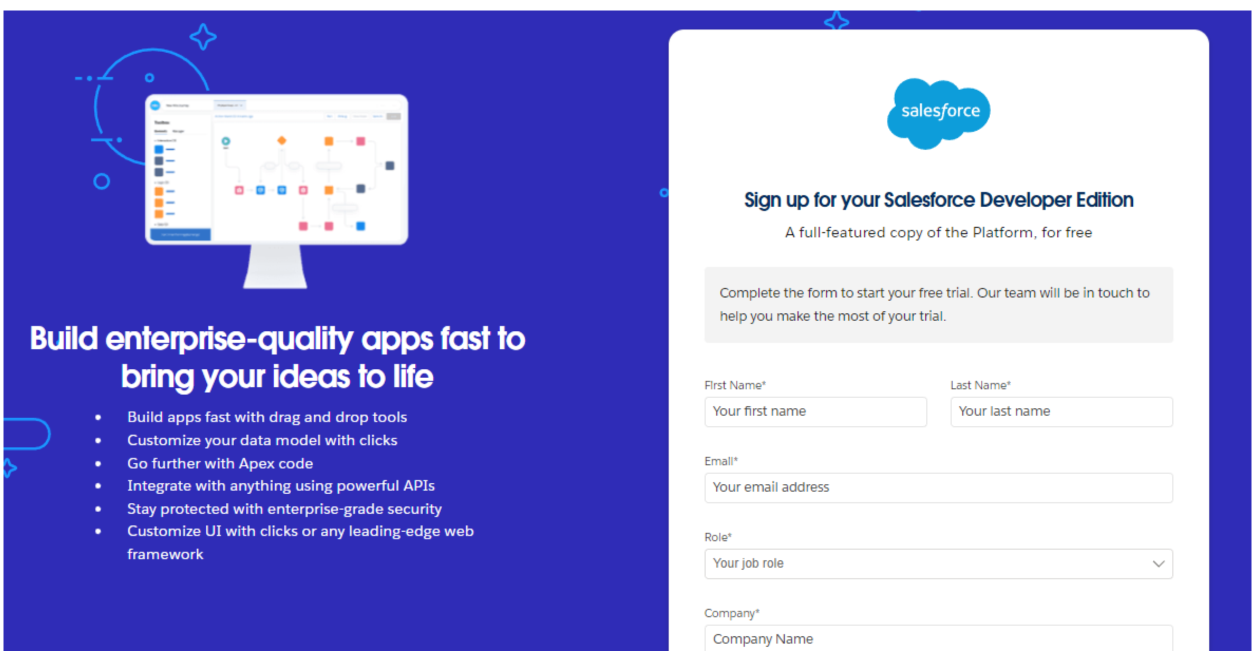
- we create the account by using the link: https://developer.salesforce.com/signup
- We need to give the following for the account creation:

1. First Name
2. Last Name
3. Email
4. Assign the Role as Developer
5. Country as India
6. Assign the PinCode

NOTE:

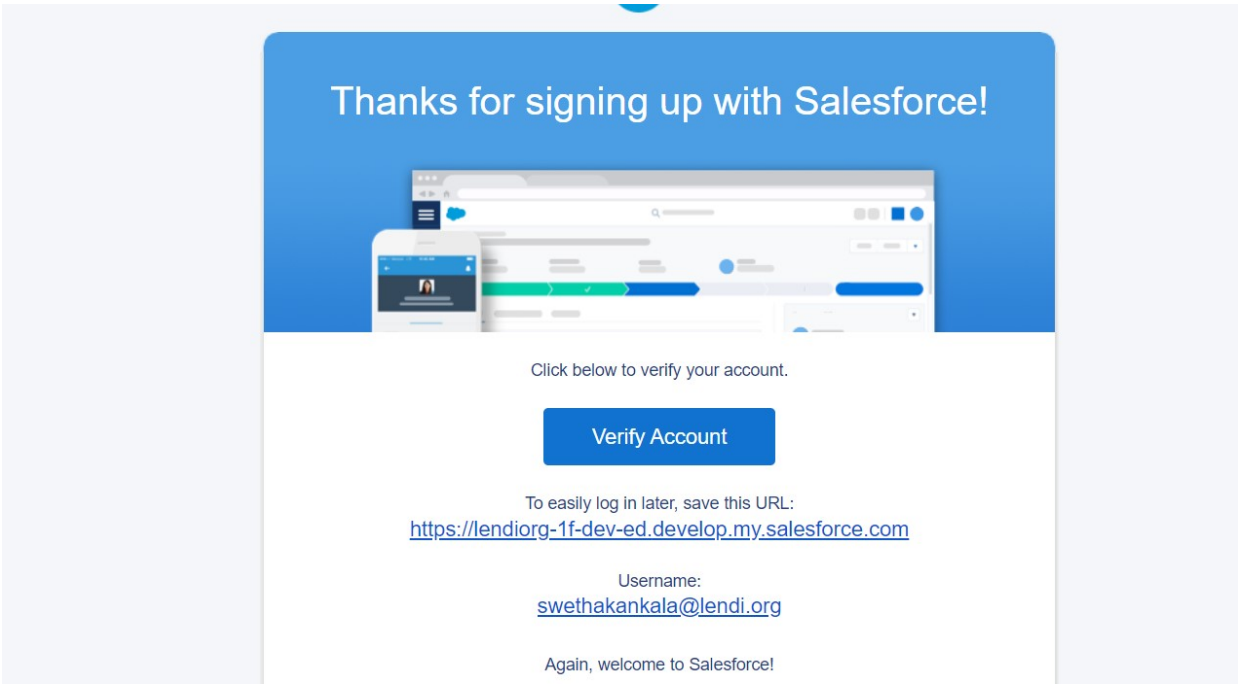
Username : should be a combination of your name and company

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.

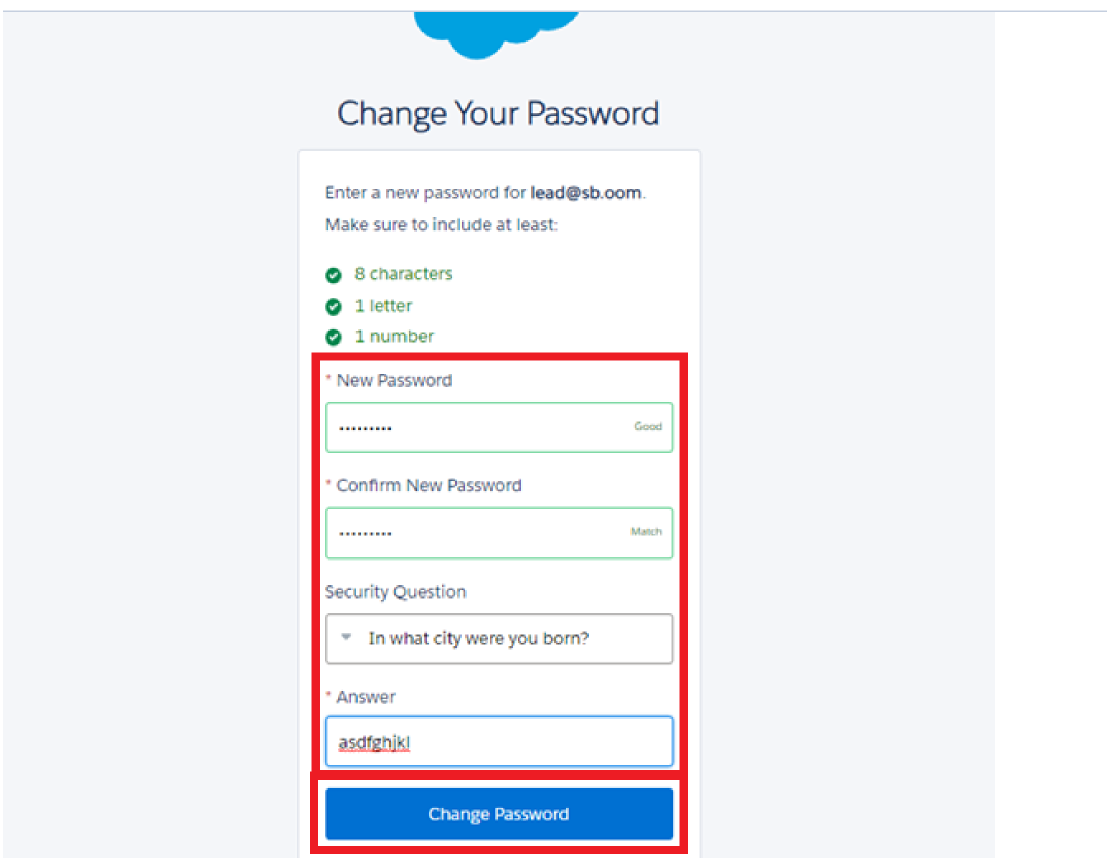


➤ **Account Activation:**

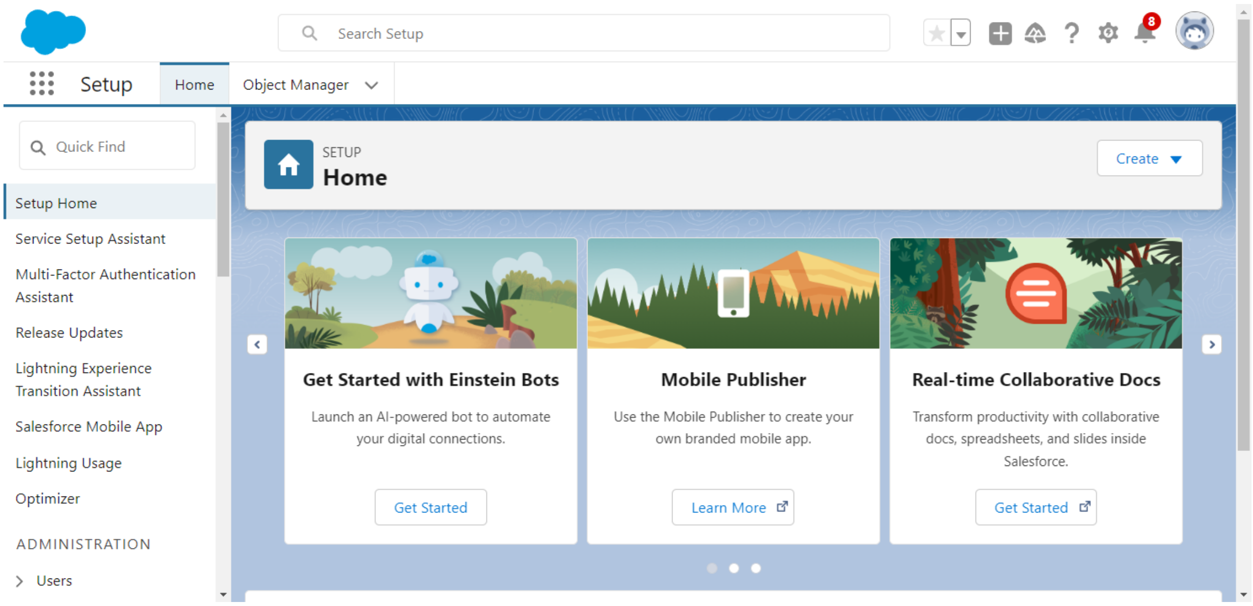
- Redirect to email inbox to check whether the mail is received for the developer account activation.
- Click on the Verify Account.



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



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



<u>MILESTONE-2: OBJECT</u>

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

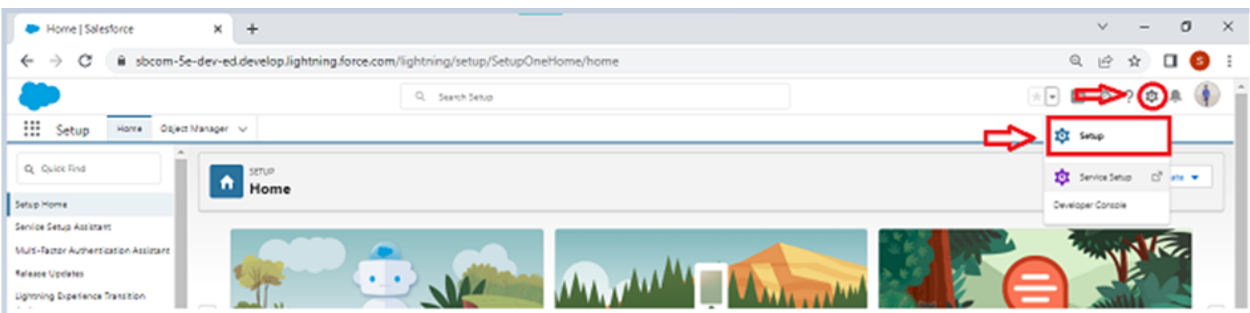
Examples:users, Leads, Reports, Dashboards.

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



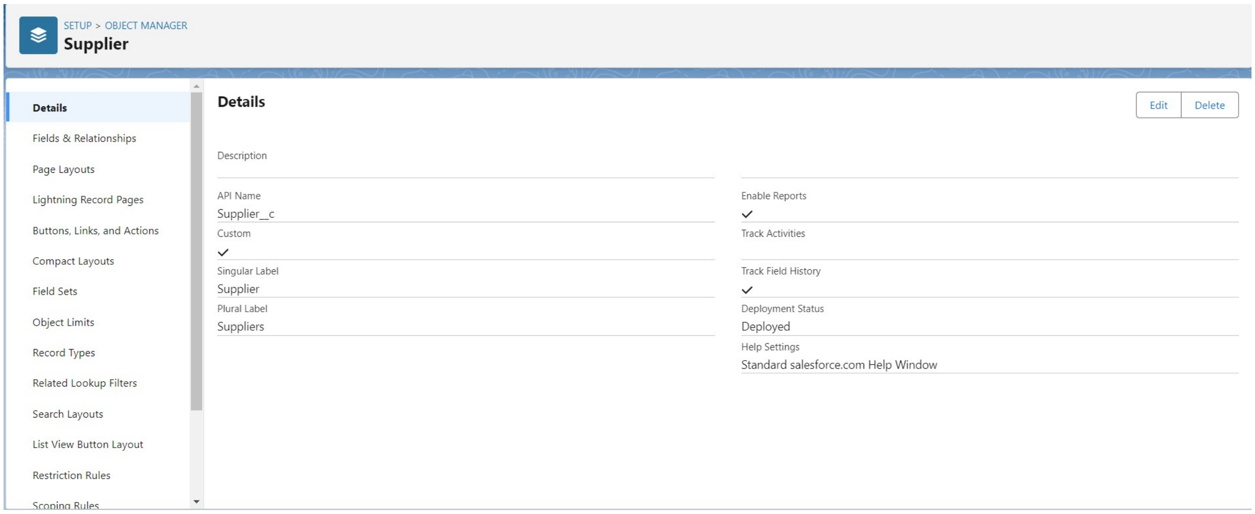
Here the Objects created under Objects for this Application:

- 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

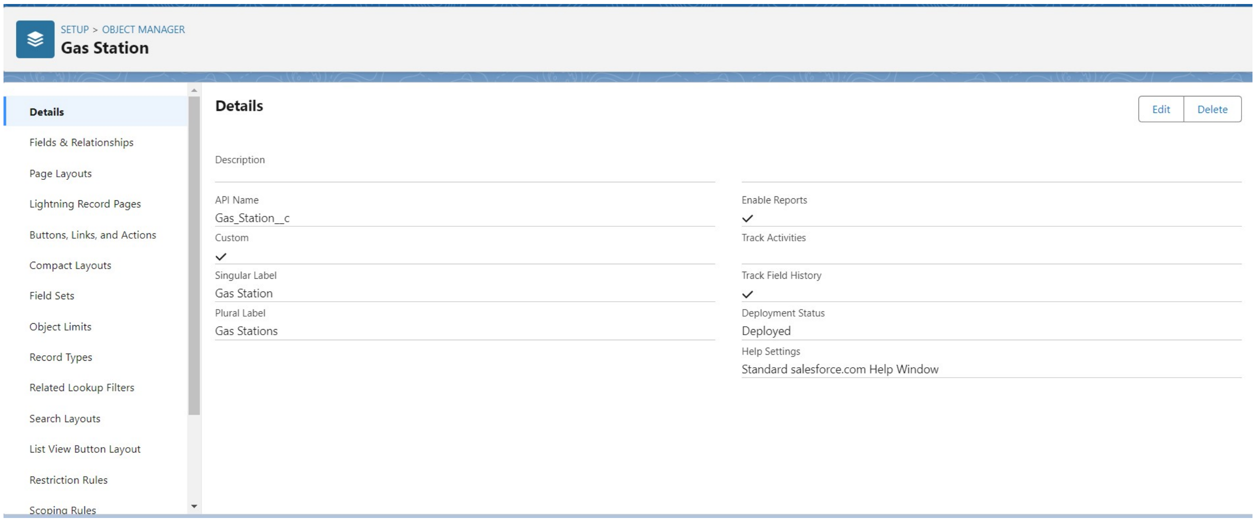
- Enter Record Name Label and Format
- Record Name ? Supplier Name
- Data Type ? Name
- Click on Allow reports and Track Field History.
- Allow search and then Save.



➤ Create Gas Station Object:

To create an object:

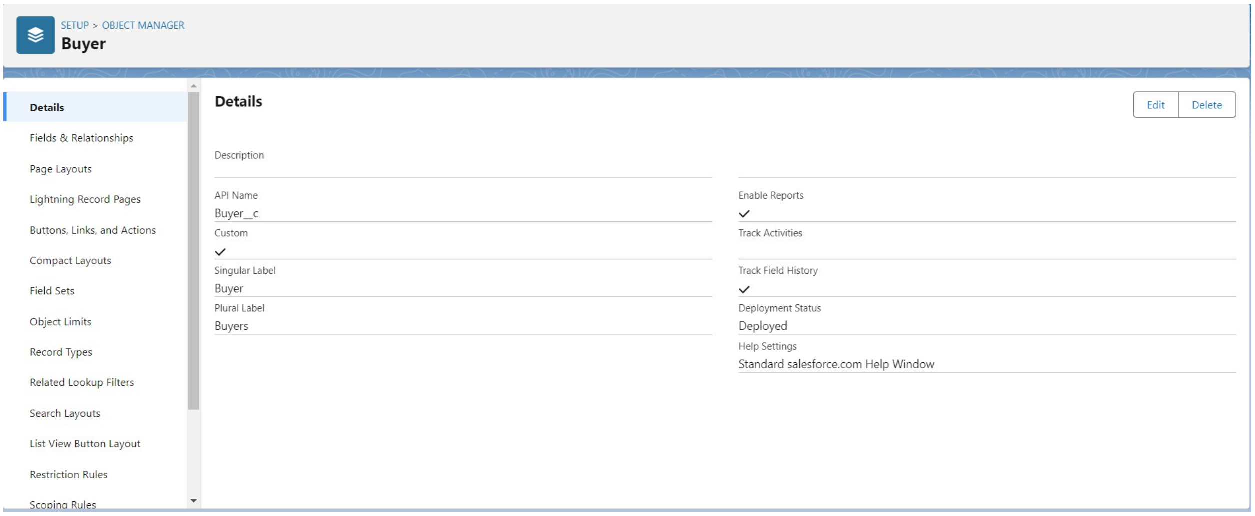
- From the setup page ? Click on Object Manager ? Click on Create ? Click on Custom Object.
- Enter the label name? Gas Station
- Plural label name? Gas Stations
- Enter Record Name Label and Format
- Record Name ? Gas Station
- Data Type ? Auto Number
- Display Format ? Gas-{000}
- Starting number ?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



➤ Create Buyers and Fuel Details Object:

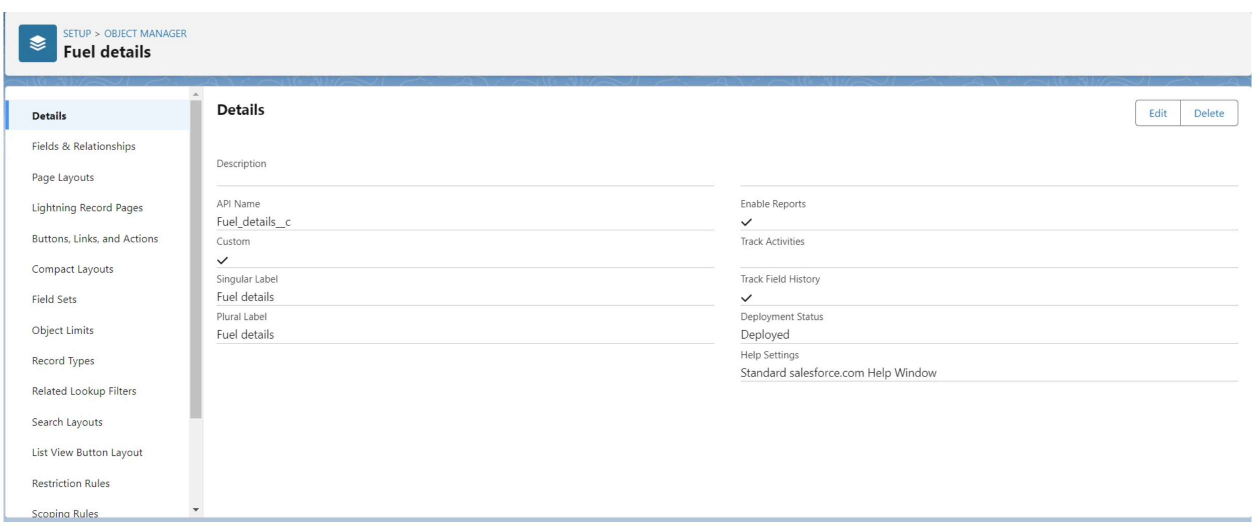
Buyers Object:

- 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.



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.



- The above mentioned objects are required for filling the Gas

Station Application.

<u>MILESTONE-3:TABS</u>

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

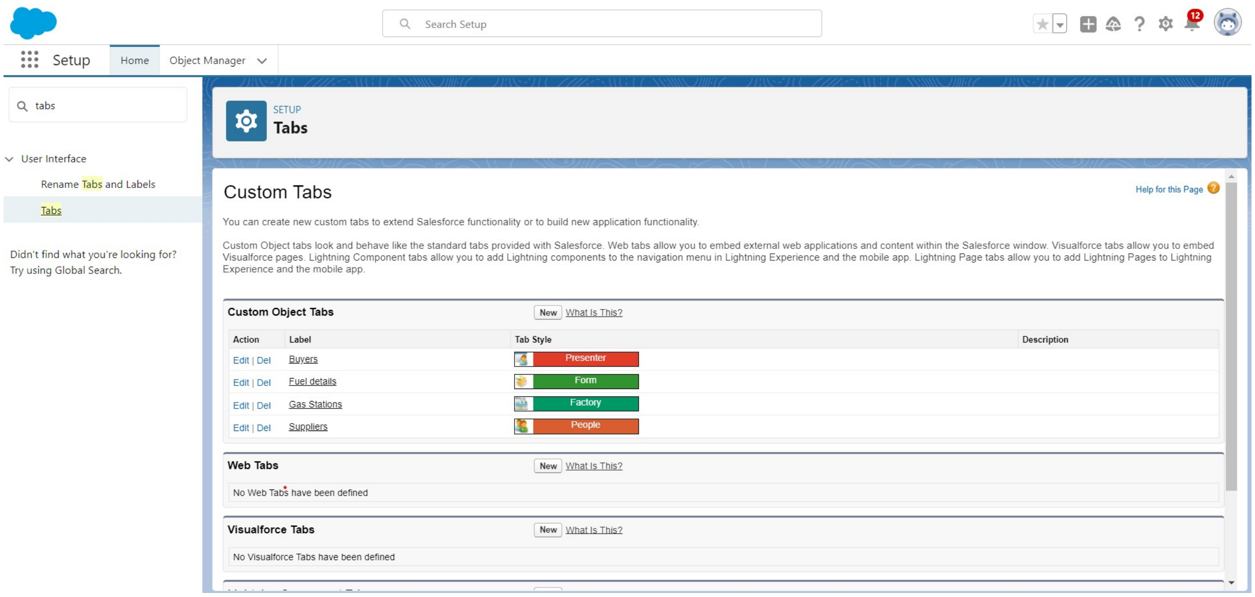
- Go to setup page?Search for tabs and then select tabs.
- Select Object(Gas Station)?Selecct the tab style as Factory.
- Uncheck the include tab.
- Make sure append tab to users is checked and the save.

3.To create Tab:Buyer

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



MILESTONE 4:The Lightning App

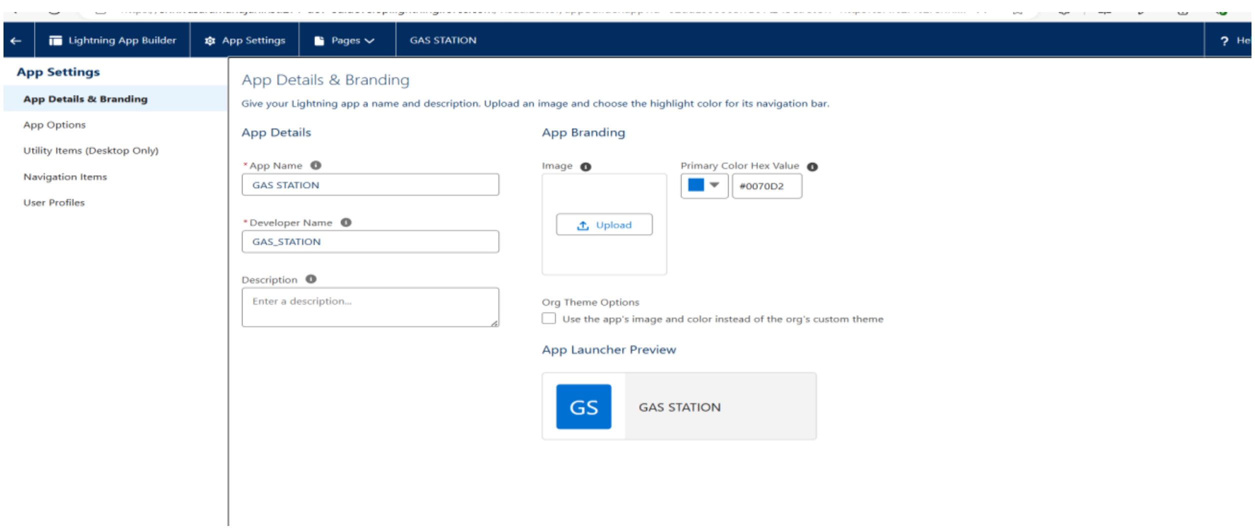
What is Lightning App:

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

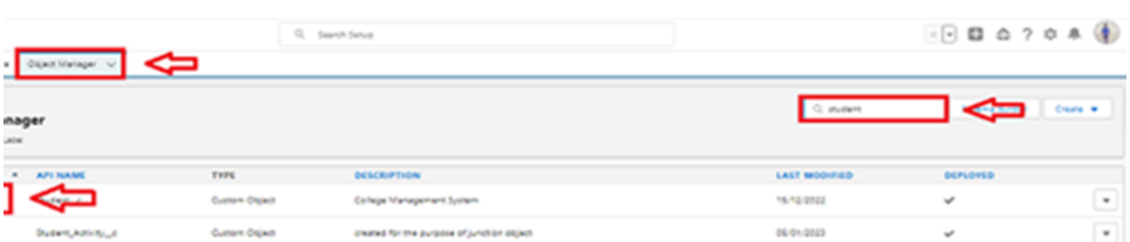
? Field Made During object Creation

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.

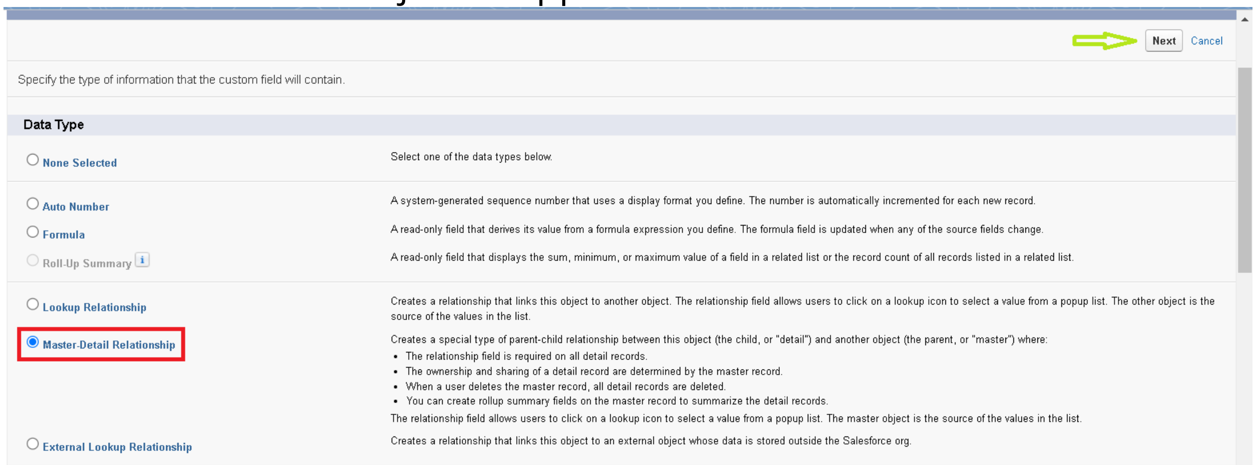
➤ **Creating Junction Object:**

- 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.



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.



- 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:

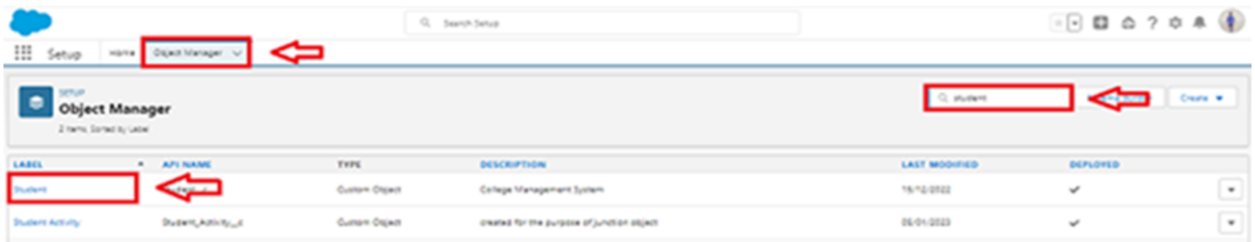
- To Create a Master-Detail relationship
- Go to the setup page ? click on object manager ? From drop down click edit for Buyer object.
- Click on fields & relationship ? click on New.
- Select “Master-Detail relationship” as data type and click Next.
- Select the related object “ Gas station ”.
- Give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

➤ Creating the number field in Fuel details object

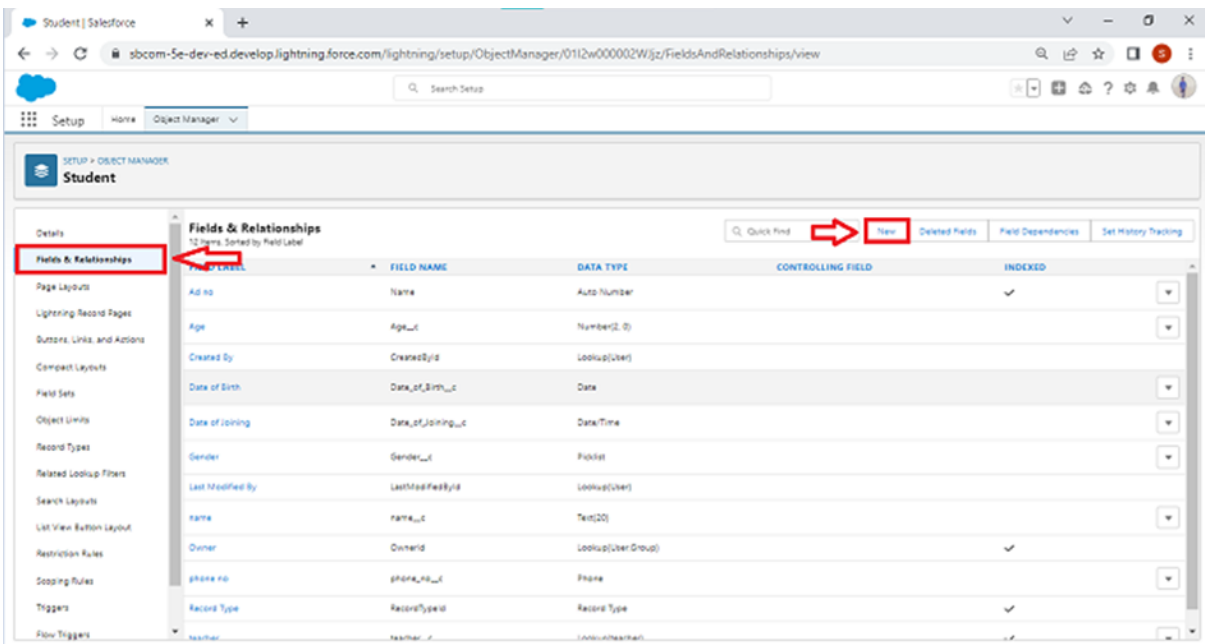
- Repeat the steps mentioned in the activity 1 and 2.
- Make sure that the datatype should as Number.

➤ Creating the Roll-up Summary

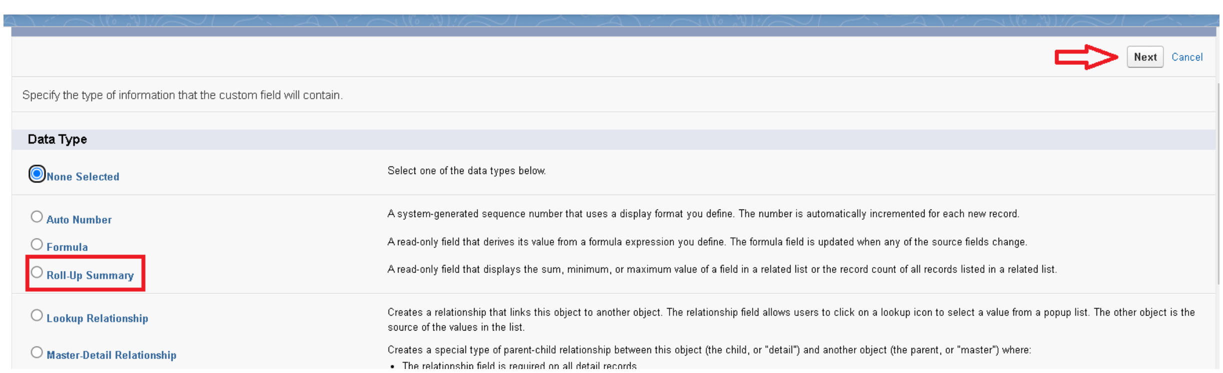
- Go to Setup,click on Object manager and give the object name as Supplier.



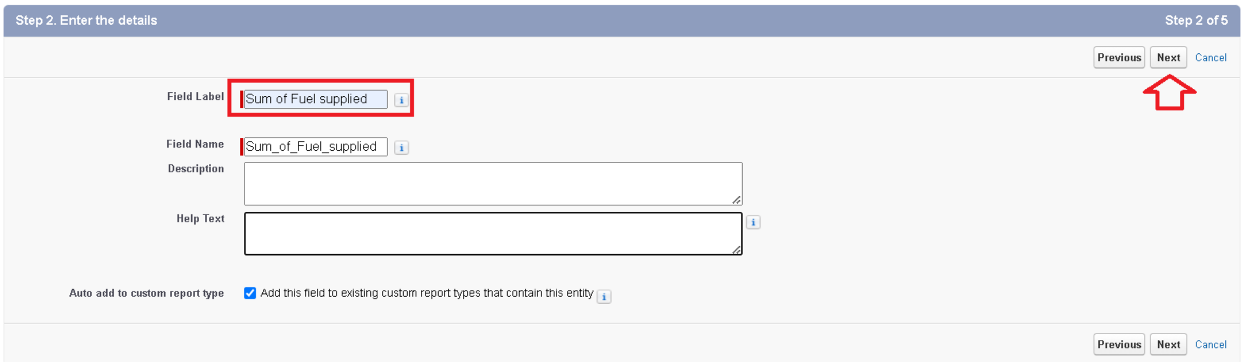
- click on Fields and Relationships and click on new.



- Select the data type as roll up summary.



Give the Field label as “ sum of Fuel supplied ”,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.
- 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

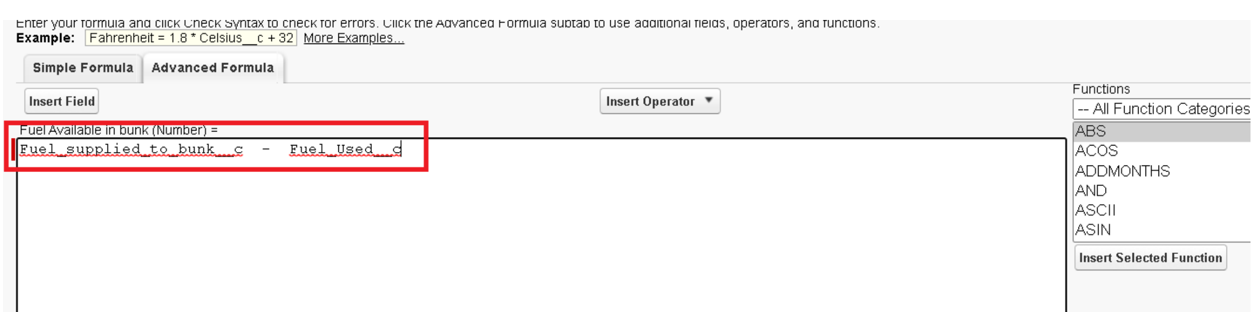
datatype in Buyer object.

- 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.

- 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



➤ Creating the Formula field in Buyer Object

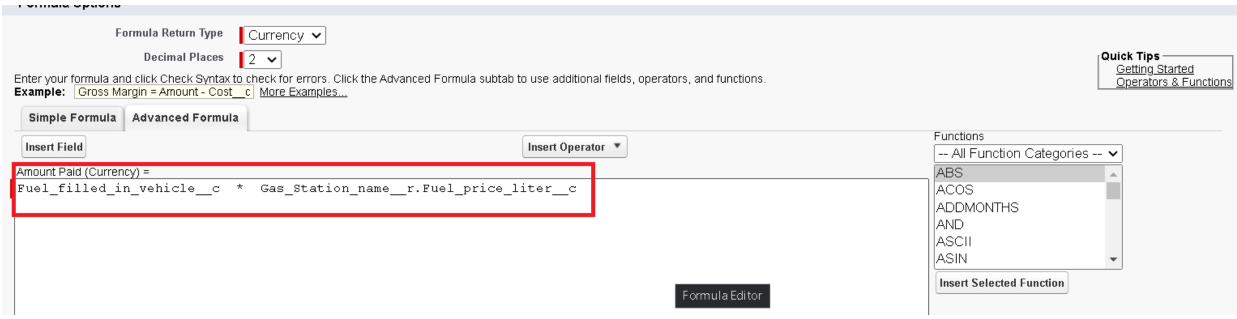
- Note : check wheather that the fields that mentioned in the formula field are created are not , if not go to activity 9 and create that fields mentioned in Buyer object
- Go to setup ? click on Object Manager ? type object name(Buyer) in search bar ? click on the object.
- Click on fields & relationship ? 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.

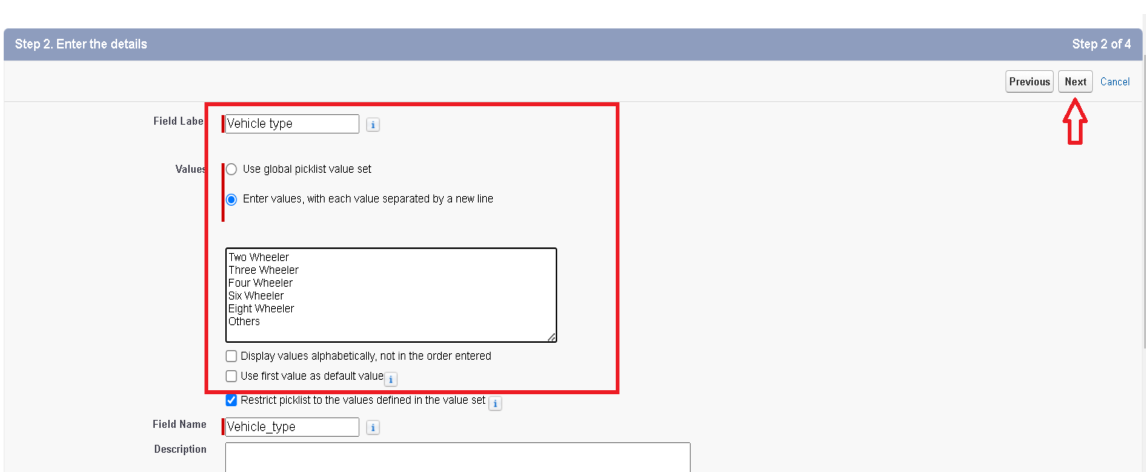
Insert fields formula should be :

- 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.

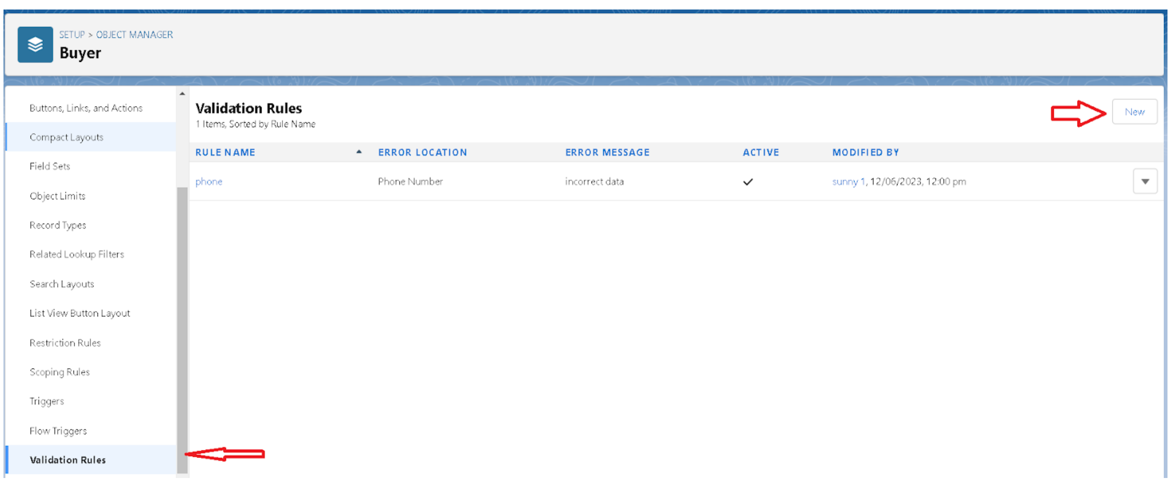


Click Next.

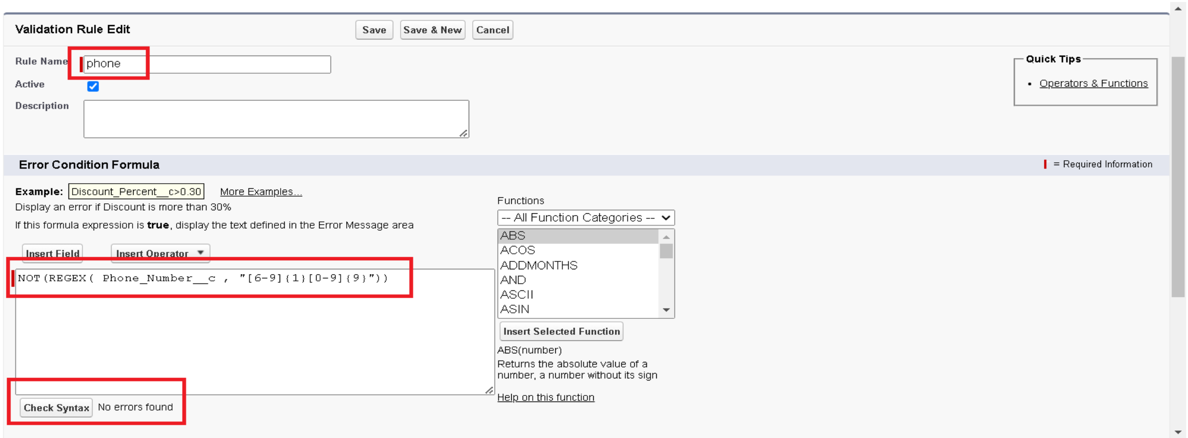
- Next ? Next ? Save & New.
- Repeat the process 1 and 2 steps .
- Enter Field Label as “Mode of payment”, under values select “Enter values, with each value separated by a new line" and enter values as shown below.
- The values are : credit card, debit card, net banking, upi, cash.
- Click Next.
- Next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

➤ Creating the validation rule

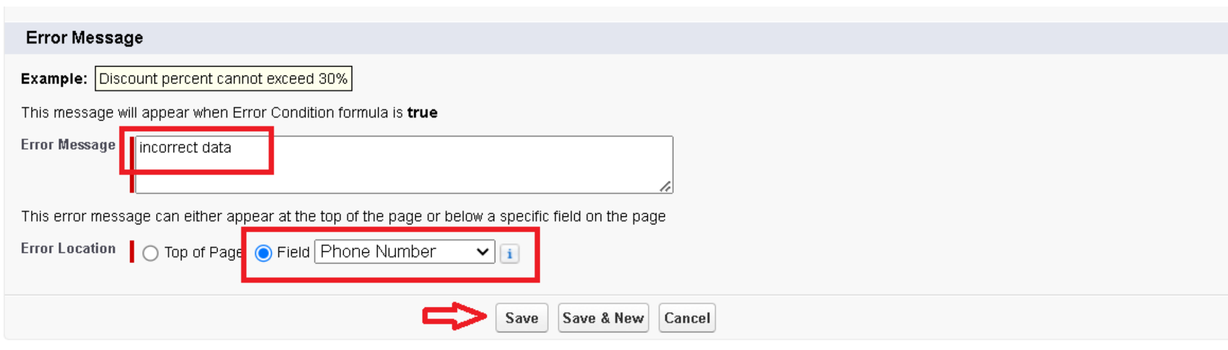
- Go to the setup page ? click on object manager ? From drop down click edit for Buyer object.
- Click on the validation rule ? click New.



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

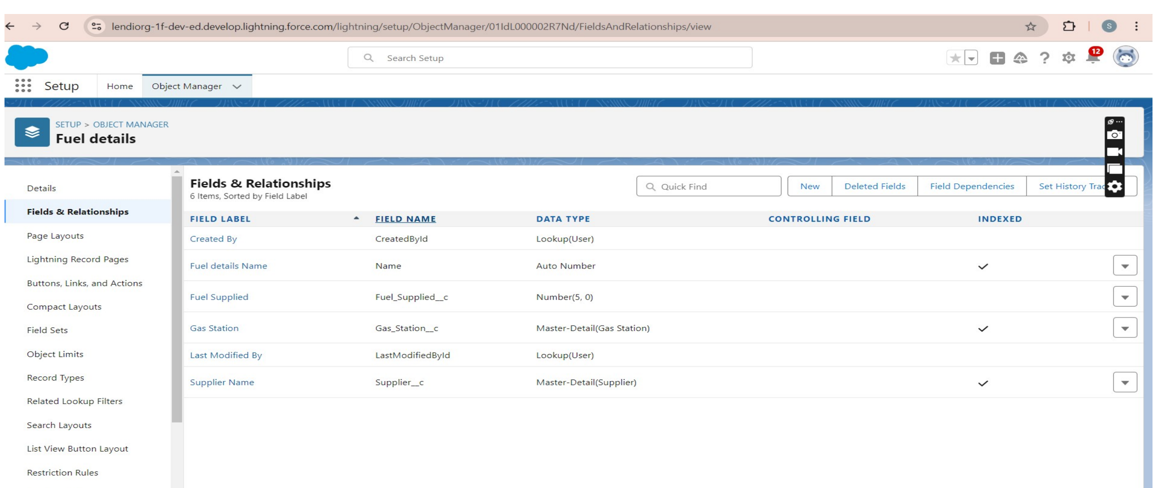


- Enter the Error Message as " incorrect data", select the Error location as Field and select the field as "phone number", and click Save.

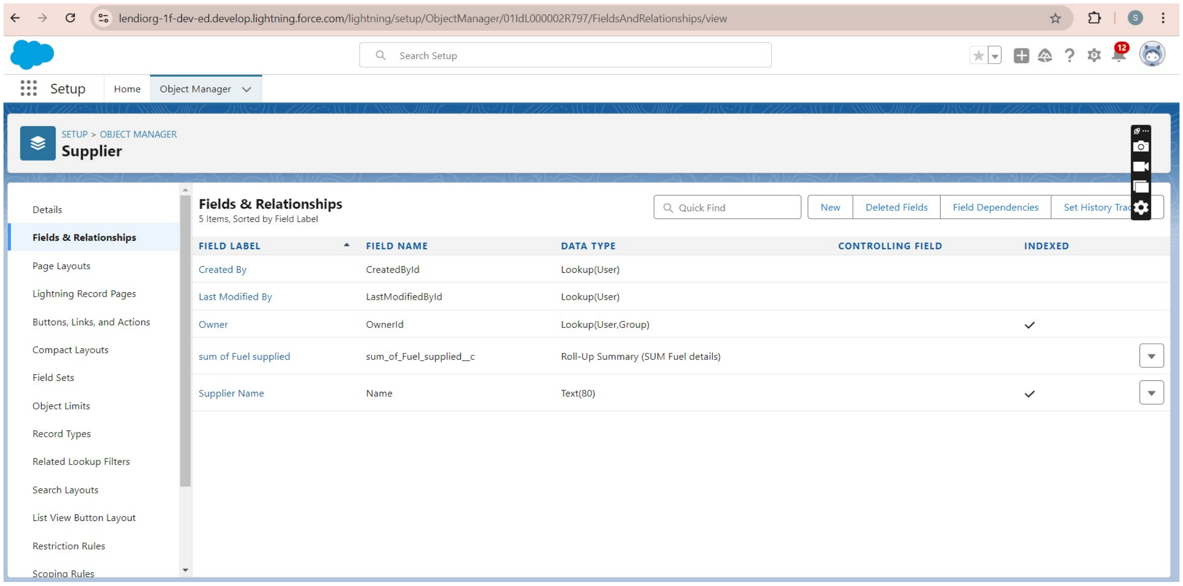


➤ Creating Remaining Fields in Objects

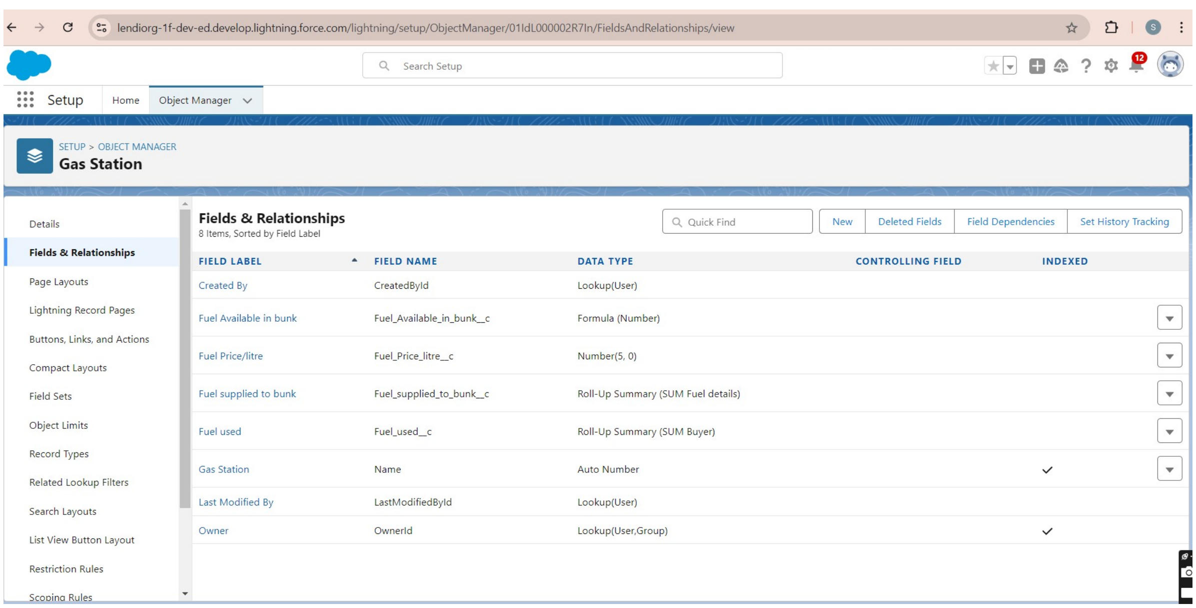
- Firstly,check whether fields under object Fuel Details is created or not.



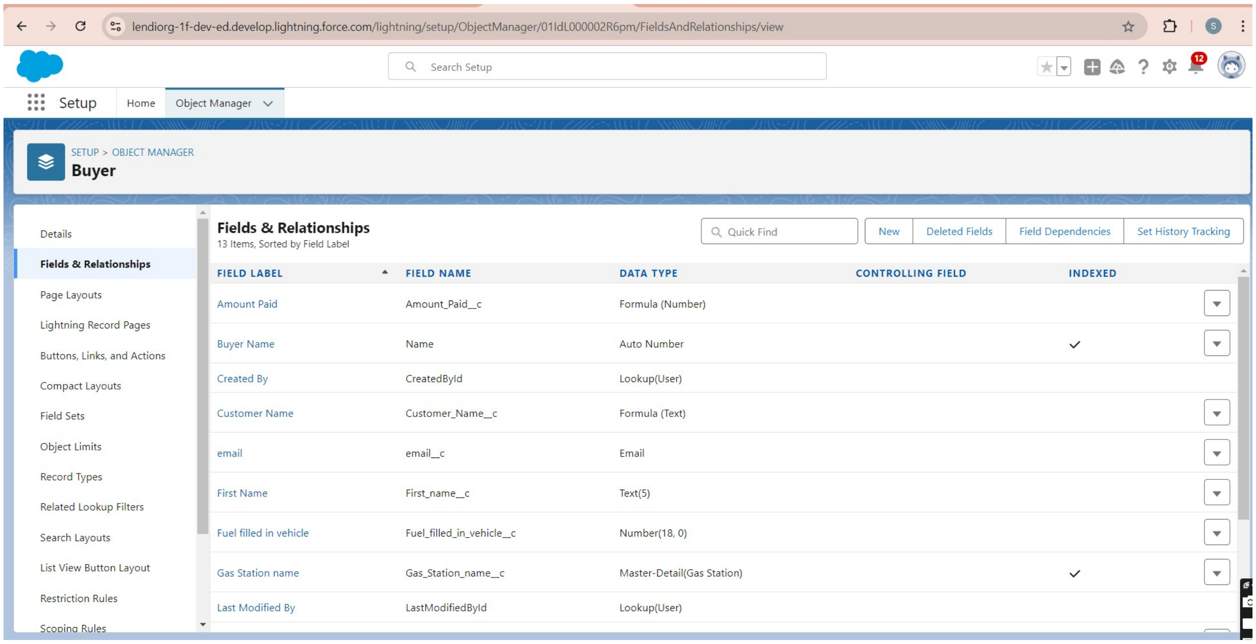
Then,check whether fields under object Supplier is created or not.



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



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

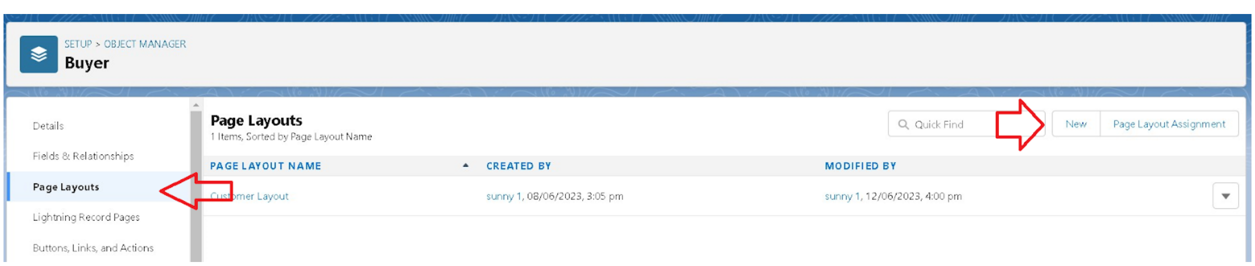


MILESTONE-6:PAGE LAYOUTS

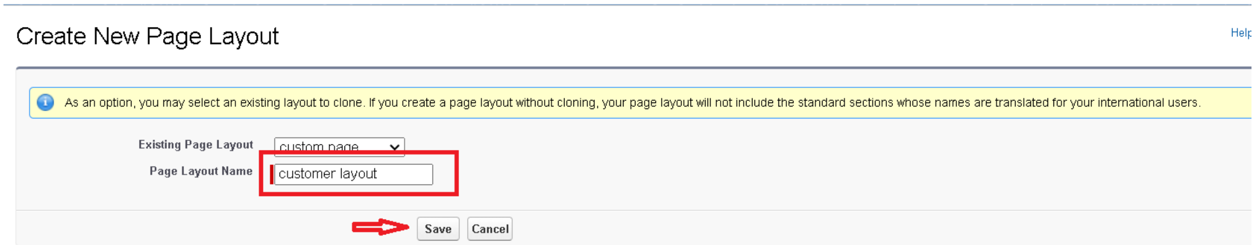
App Page Layout" refers to the configuration and design of an individual page within a Salesforce app. App Page Layouts determine the structure, appearance, and available features of a page in the app.

➤ **creating the page layout**

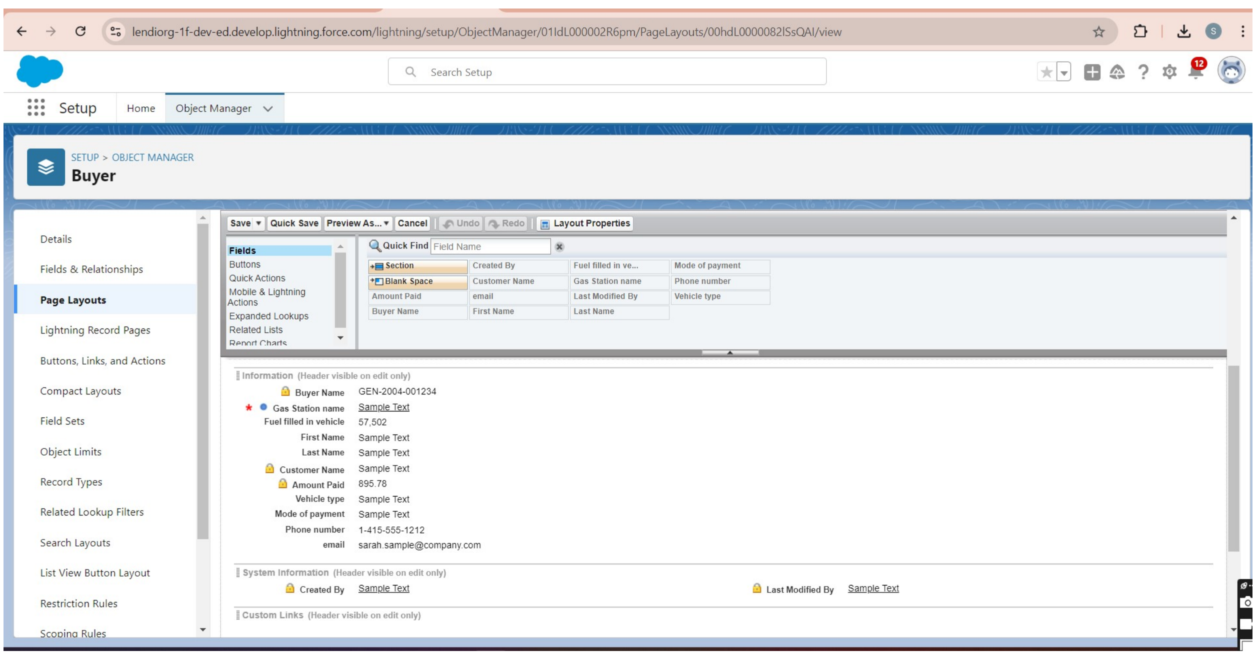
- Go to Setup ? Click on Object Manager ? Search for the object (Buyer) ? From drop down select the object and click on it.
- Click on Page layout ? Click on New.



- Select the existing page layout, and give the page layout name as “customer layout”, and click save.



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



- Now drag the fields to this section that mentioned , they are First name , last name , customer name , phone number, email, Gas station name.
- Follow the same process for another two sections as shown above they are 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

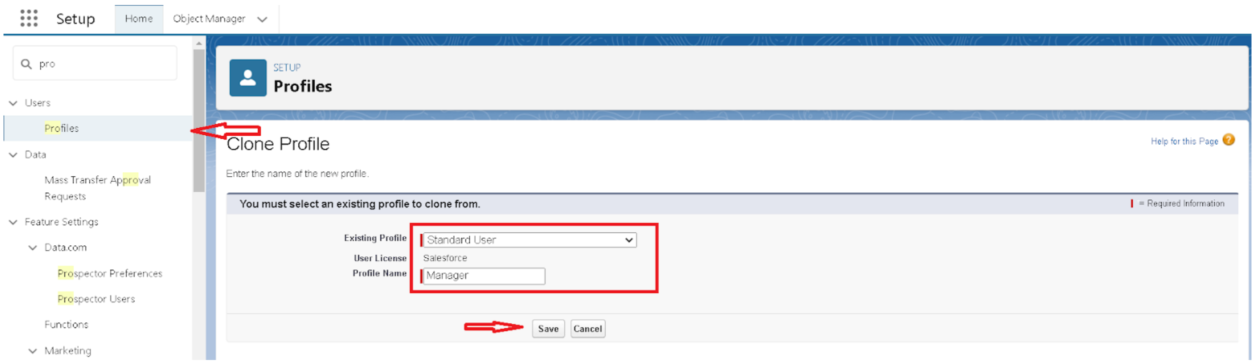
In Salesforce, a "Profile" is a collection of settings and permissions that define what a user can see and do within the Salesforce platform. Profiles control access to data, applications, and features, ensuring users have the necessary permissions to perform their job functions while maintaining the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

➤ Types of profiles in salesforce :

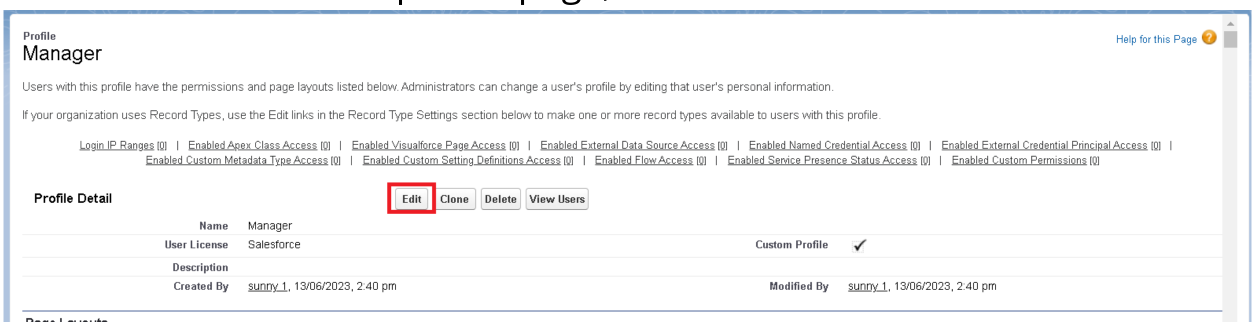
- **Standard profiles:**
- By default salesforce provides below standard profiles.
- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.
- We cannot deleted standard ones
- Each of these standard ones includes a default set of permissions for all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

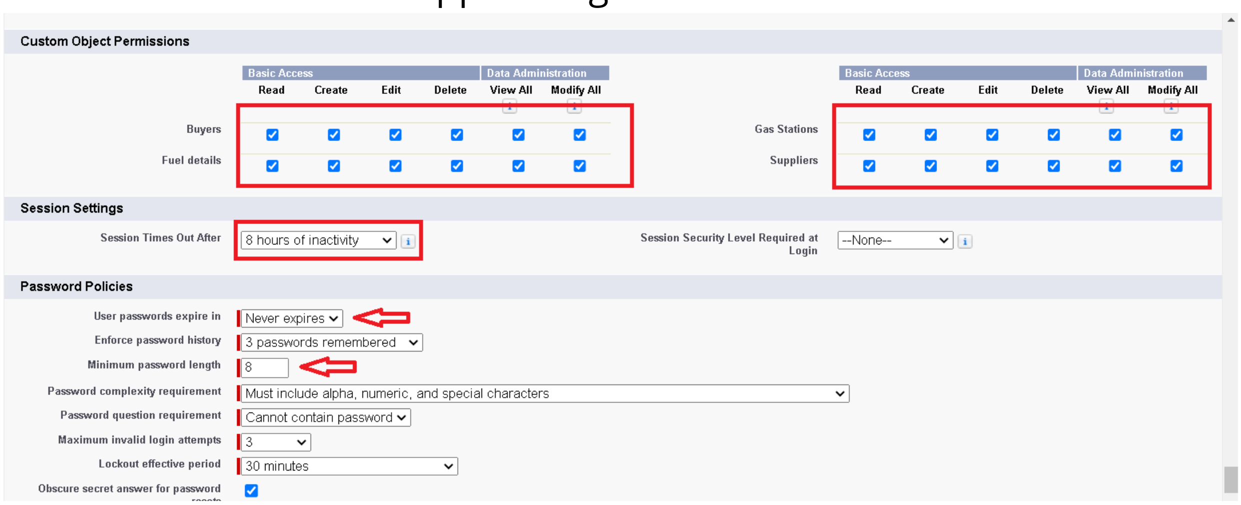
- Go to setup ? type profiles in quick find box ? click on profiles ? clone the desired profile (Standard User) ? enter profile name (Manager) ? Save.



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



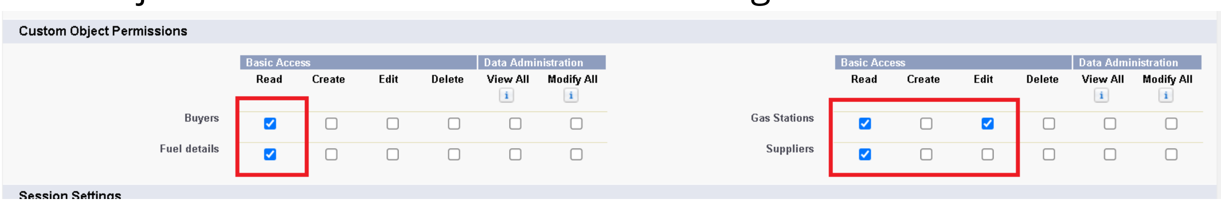
- Select the Custom App settings as default for the Gas station.



- 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:

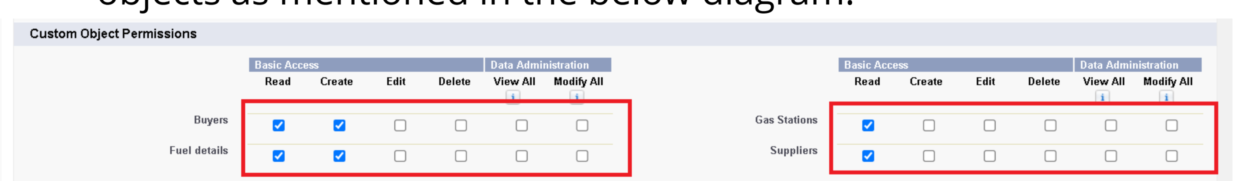
- Go to setup ? type profiles in quick find box ? click on profiles ? clone the desired profile (Salesforce Platform User) ? enter profile name (sales executive) ? Save.
- While still on the profile page, then click Edit.
- Select the Custom App settings as default for the Gas station.
- Scroll down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



- 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.



- And click save.

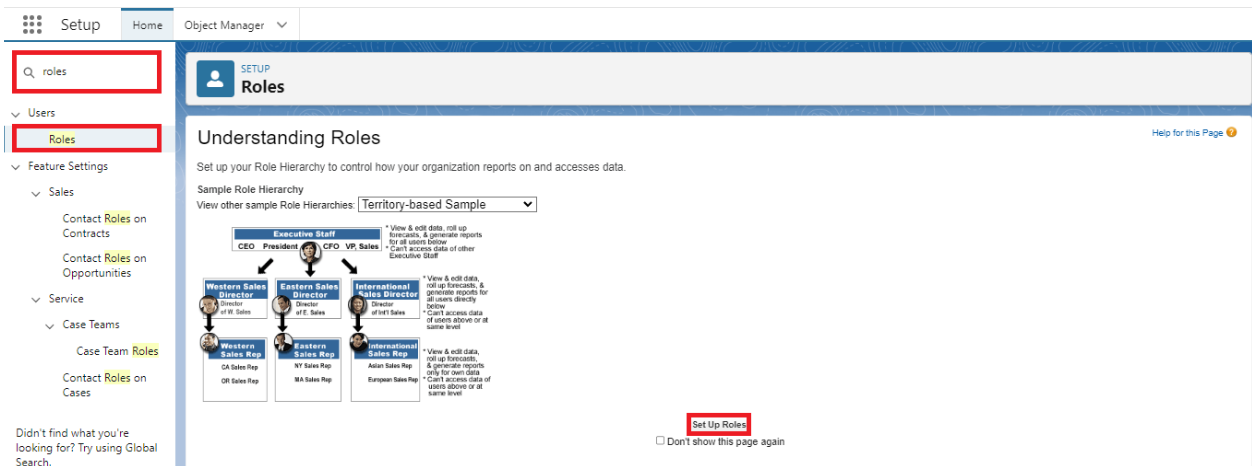
MILESTONE-8:ROLE AND ROLES HIERARCHY

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.

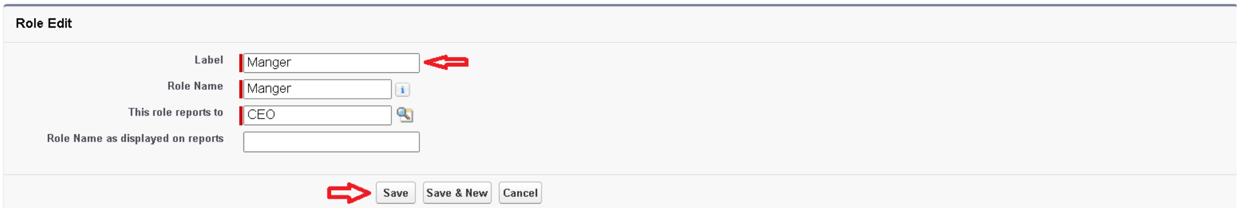
➤ Creating Manager Role:

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



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

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

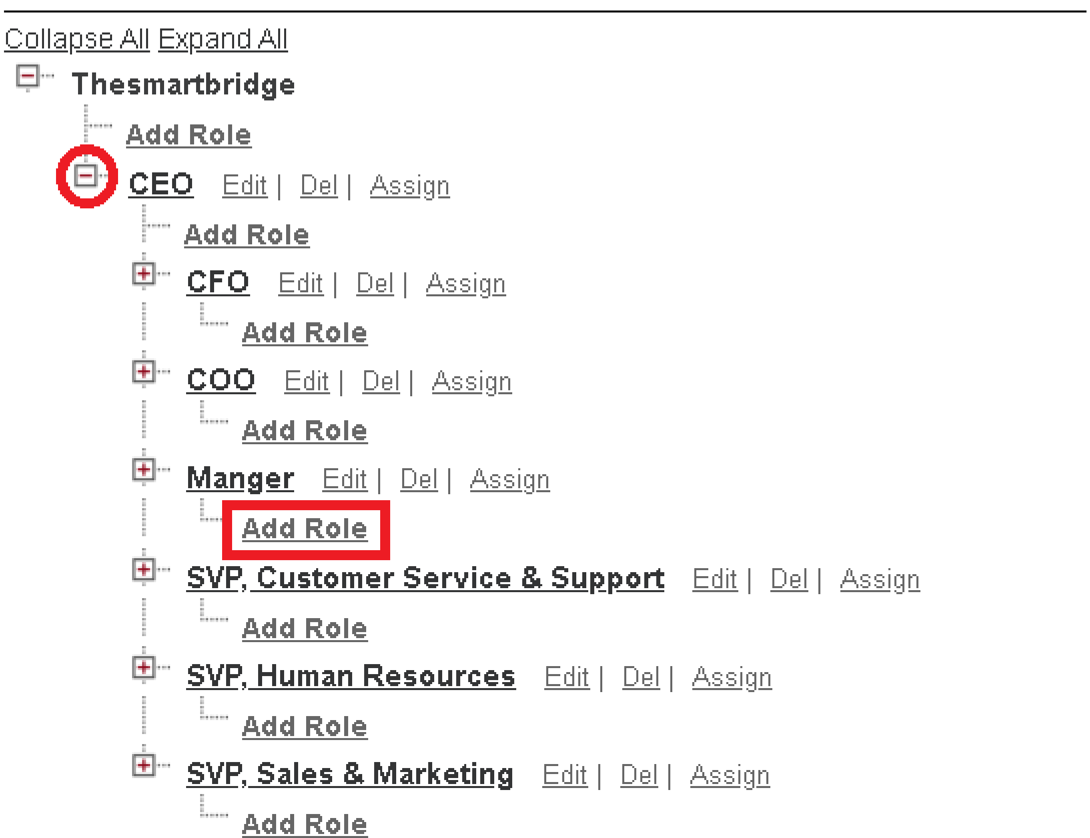


Then click on Save.

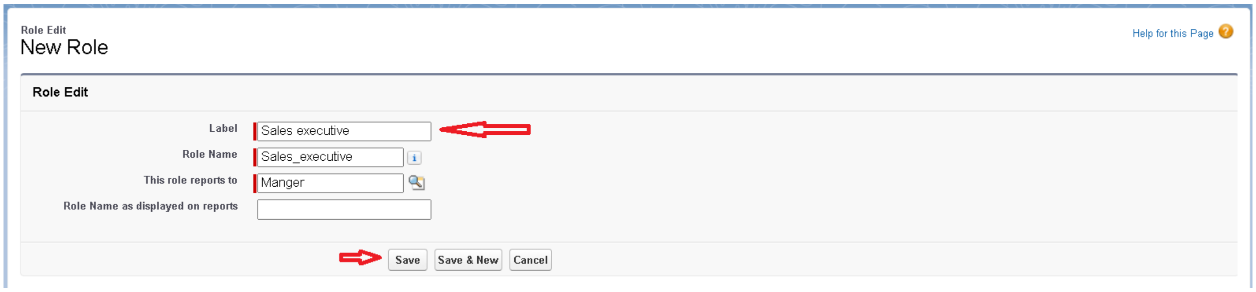
➤ Creating another roles:

Creating another two roles under manager :

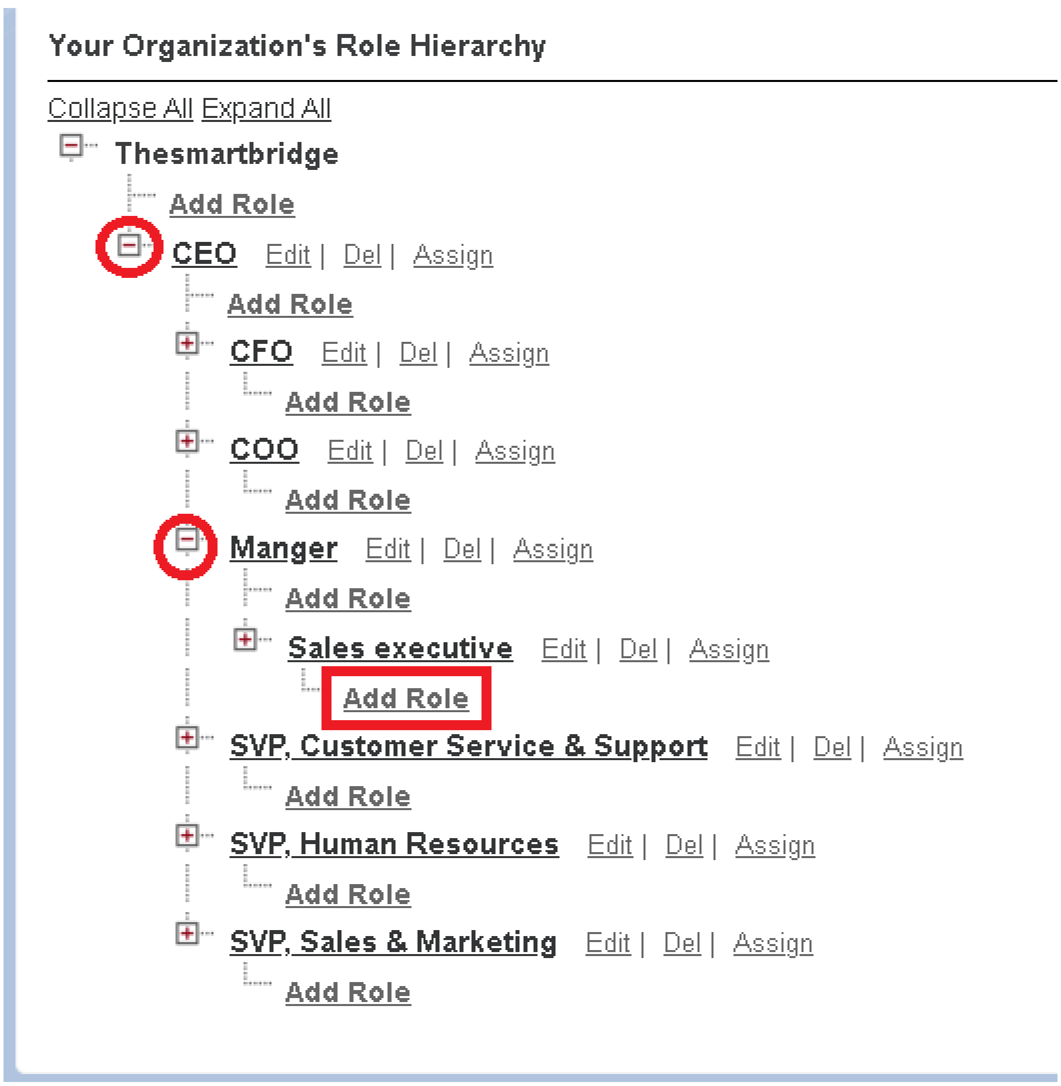
- Make sure to create labels as Sales Executive and Sales Person**.**
- Go to quick find ? Search for Roles ? click on set up roles.
- Click plus on CEO role, and click add role under manager.



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



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



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

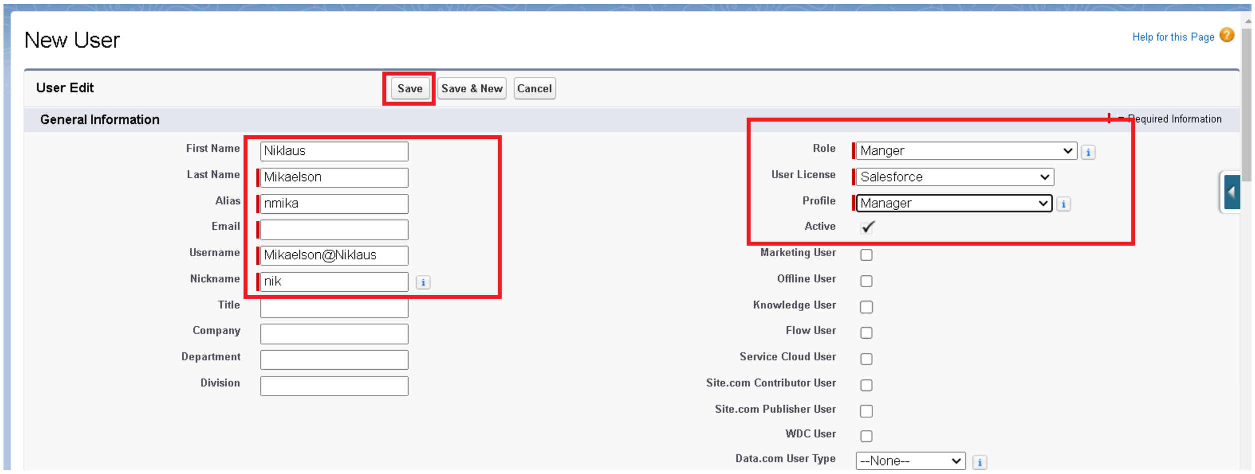
MILESTONE-9:USERS

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



- Then click on Save.

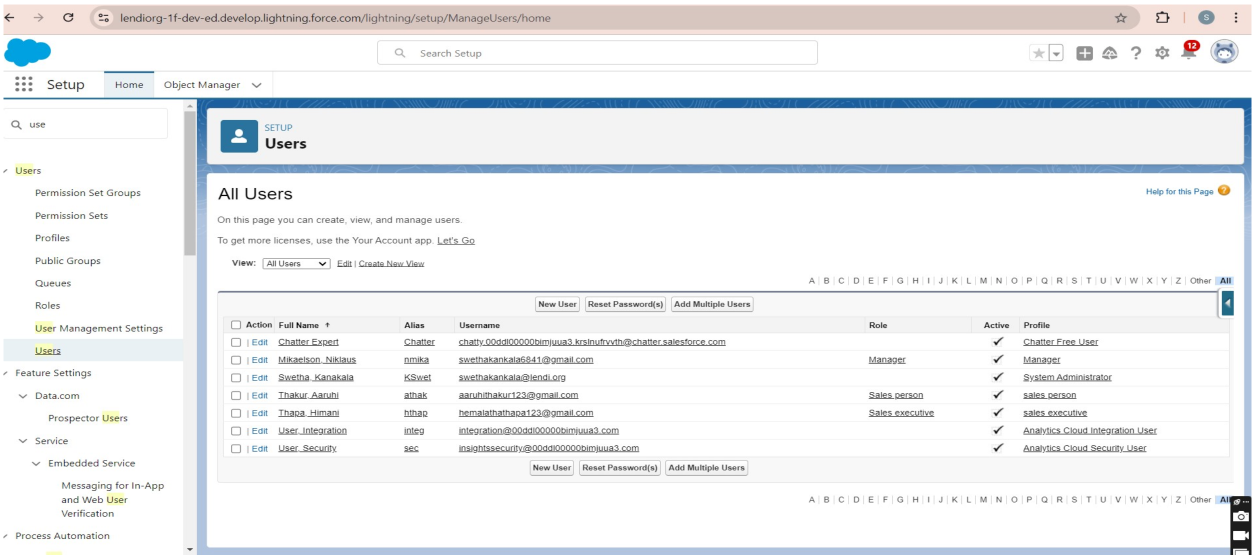
➤ **creating another users:**

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



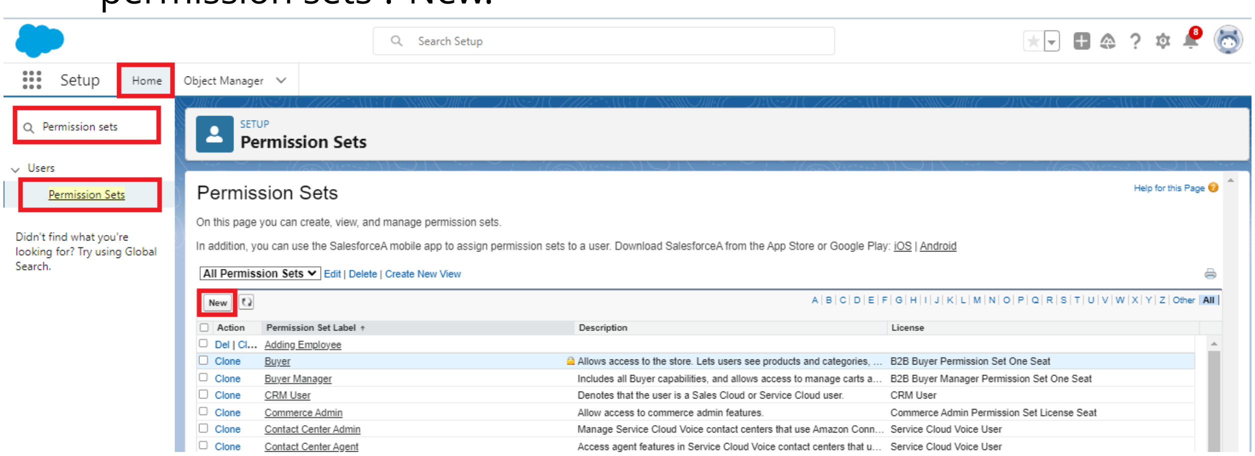
MILESTONE-10:PERMISSION SETS

What is permission sets:

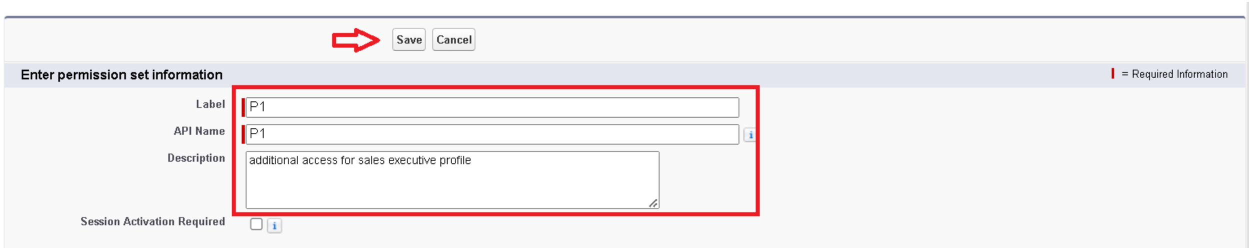
A standard permission set consists of a group of common permissions for a particular feature associated with a permission set license. Using a standard permission set saves you time and facilitates administration because you don't need to create the custom permission set.

➤ **Creating permission set:**

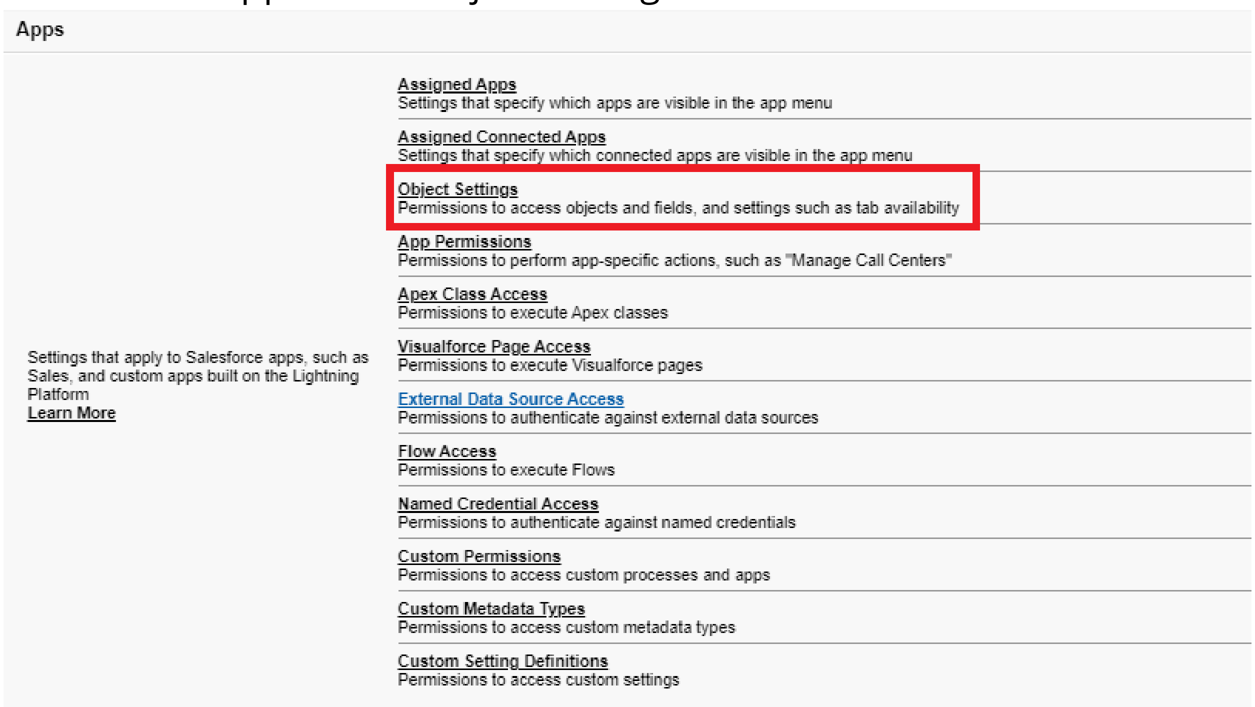
- Go to setup ? type “permission sets” in quick search ? select permission sets ? New.



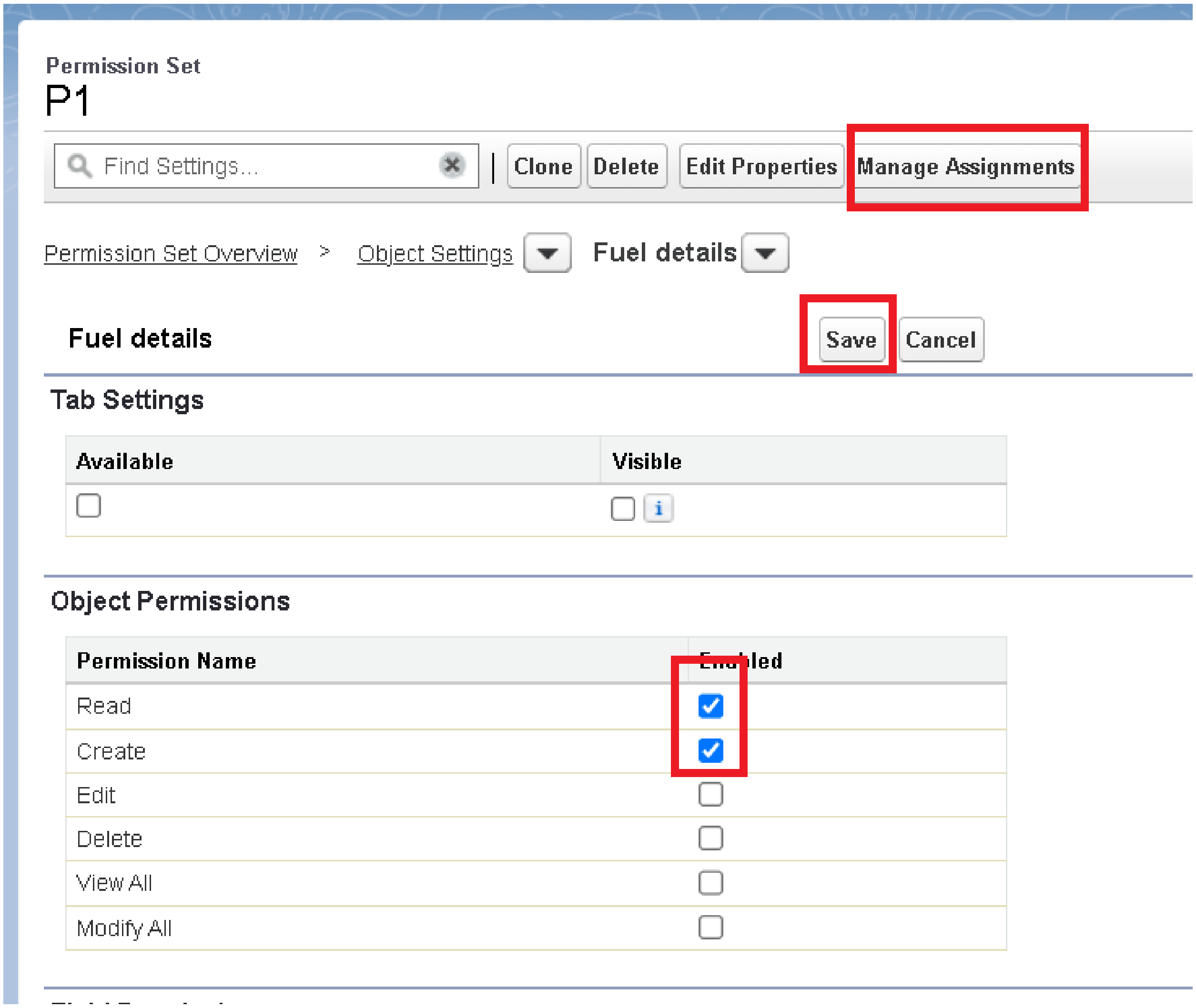
- Enter the label name as “P1”, API will be auto populated ? save.



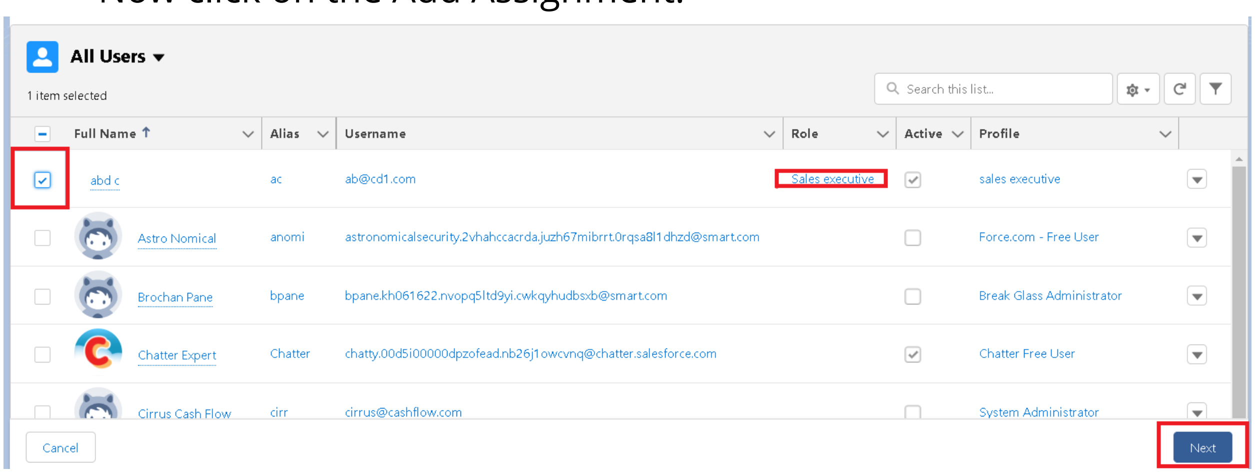
- Under Apps Select object settings.



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



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



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

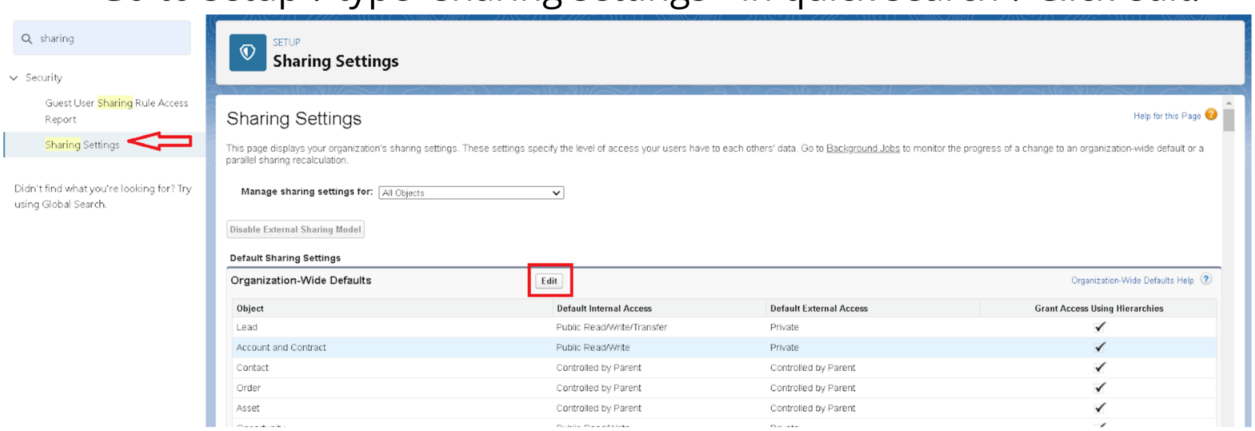
MILESTONE-11:SETUP FOR OWD

What is setup for OWD mean:

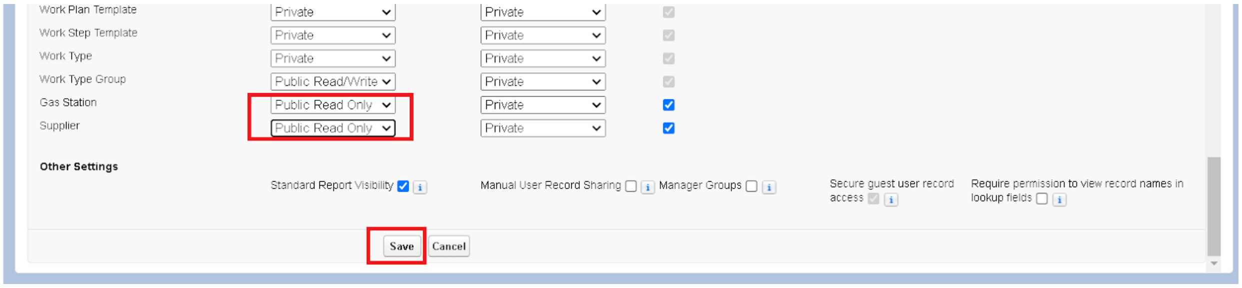
Organizational Wide Defaults (OWD) in Salesforce define the baseline level of access to records for all users in the organization. This setting specifies the default sharing settings for different objects (such as Accounts, Contacts, Opportunities, etc.) and is used to restrict access to data at the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

➤ **Create OWD Setting:**

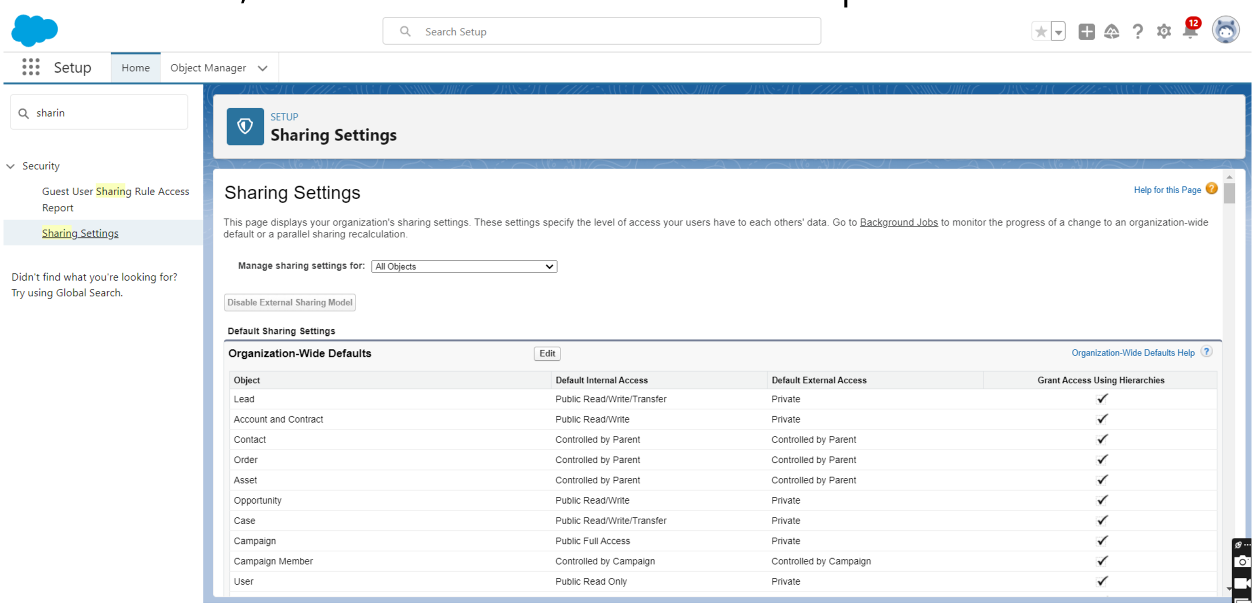
- Go to setup ? type “sharing settings ” in quick search ? Click edit.



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



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

MILESTONE-12:USER ADOPTION

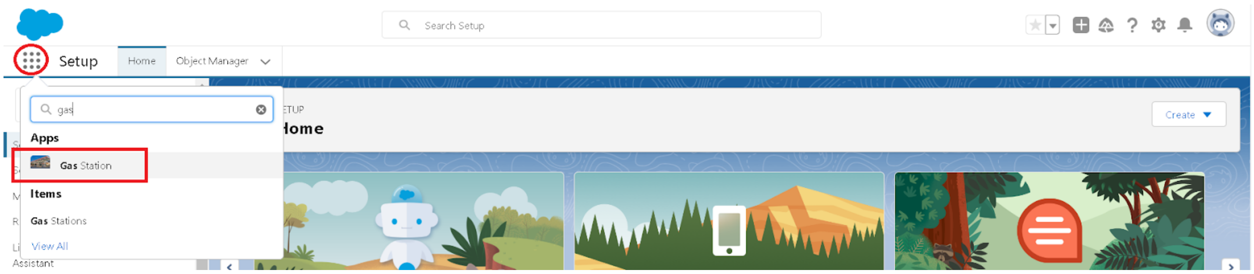
What is User Adoption:

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.

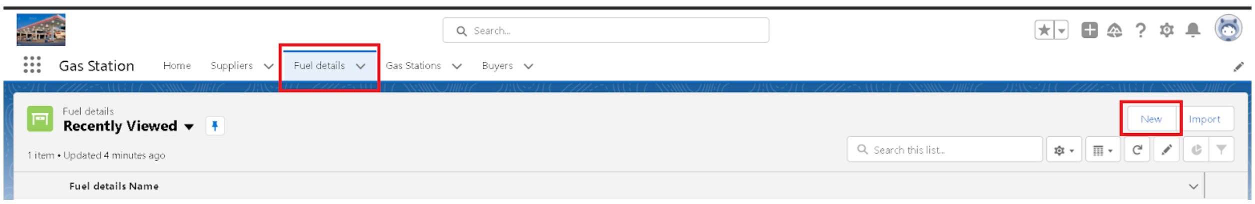
➤ **create a record:**

To create a record in junction object follow these steps

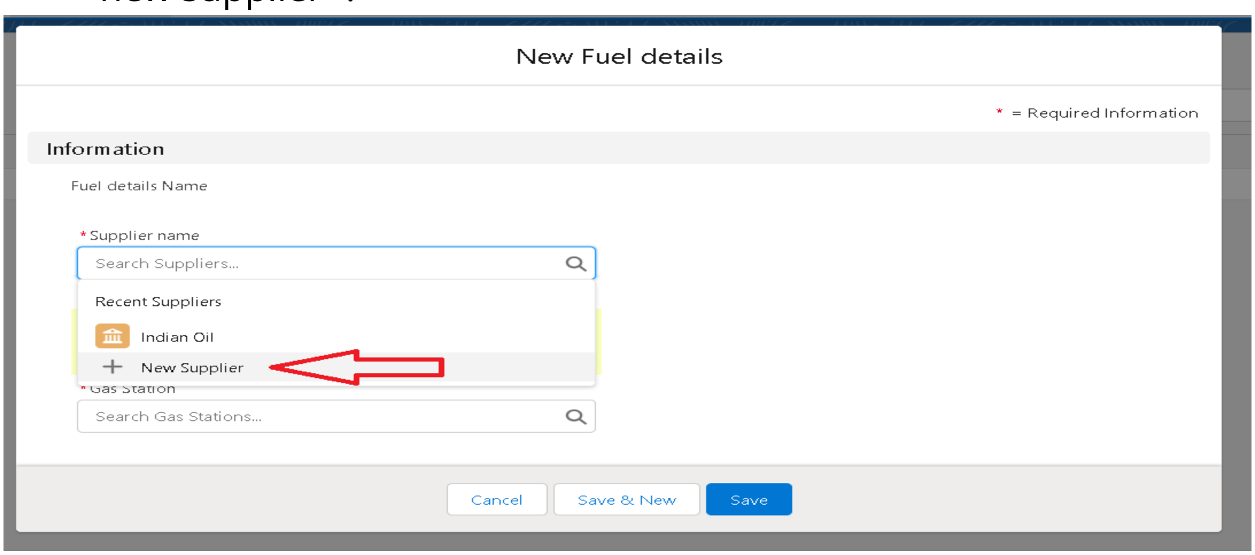
- Click on the app launcher locate at left side of the screen.



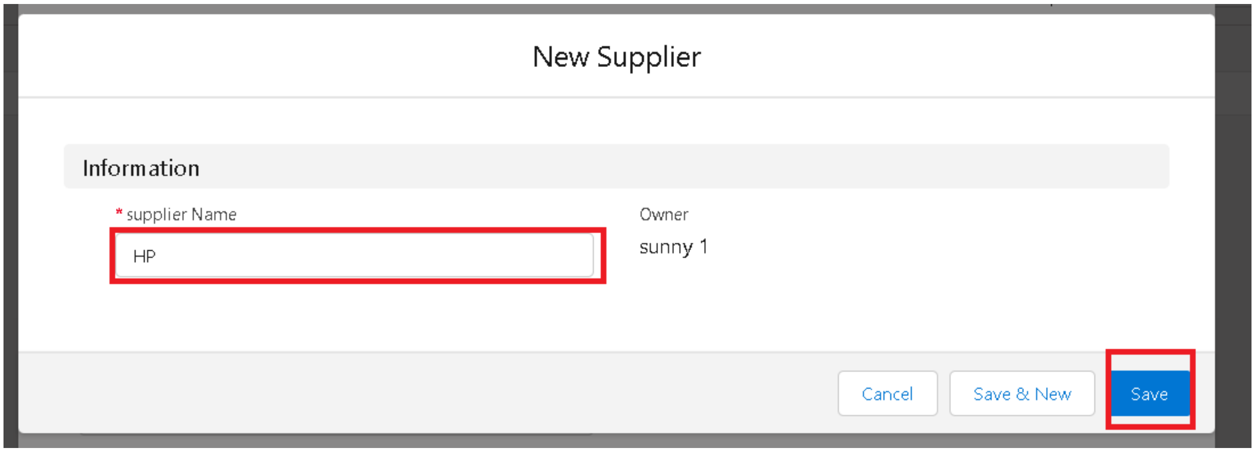
- Search for “ Gas station” and click on it.



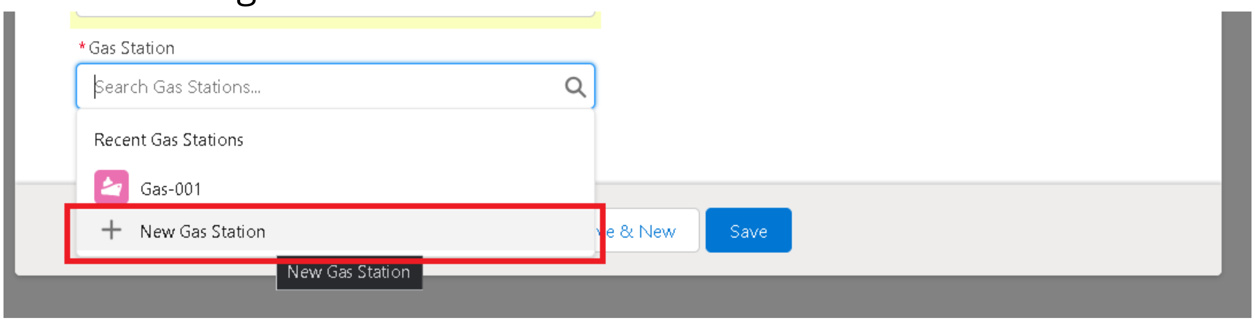
- Click on “ fuel details tab”.
- Click on new and fill the details as shown below figs, and click save.
- Creating the supplier record in fuel detail record, by clicking the “ new supplier ”.



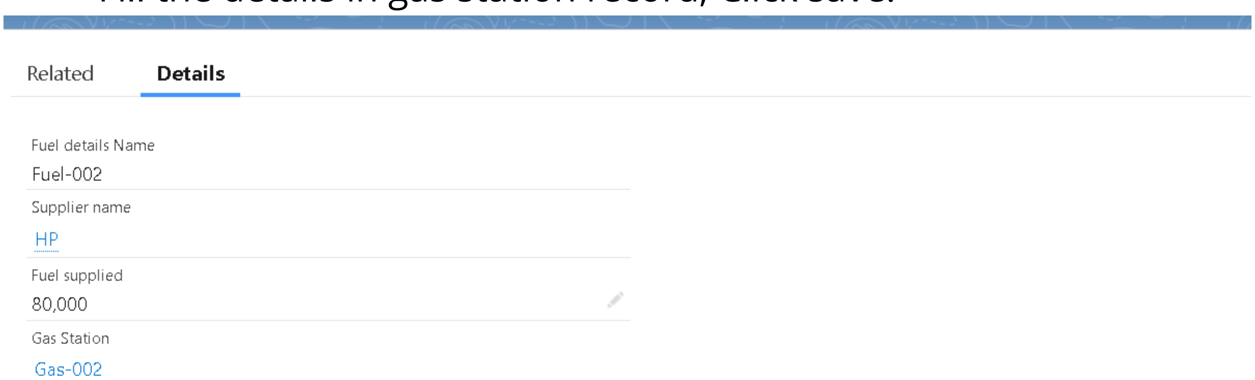
- Fill the details in supplier record and click on save.



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



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

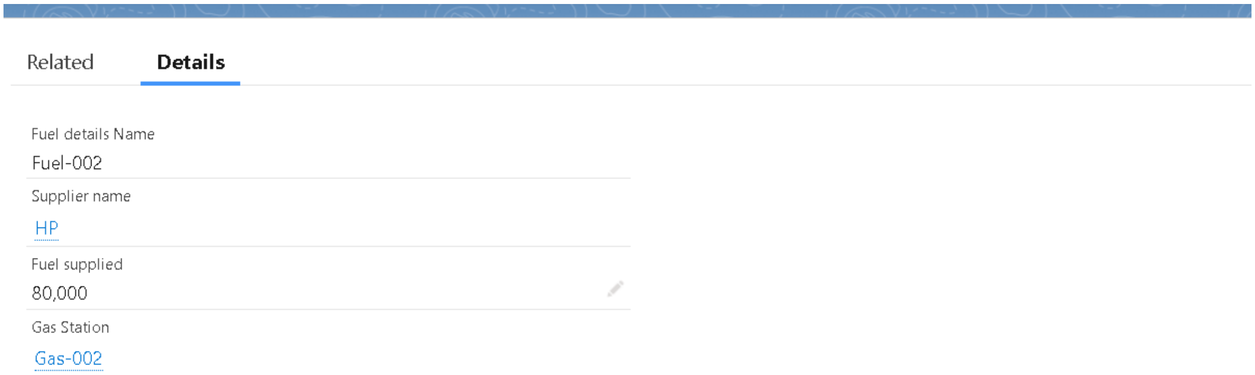


- Fill the remaining details in fuel detail record , and click save.
- Make sure to create other records for better view.

➢ **View a record:**

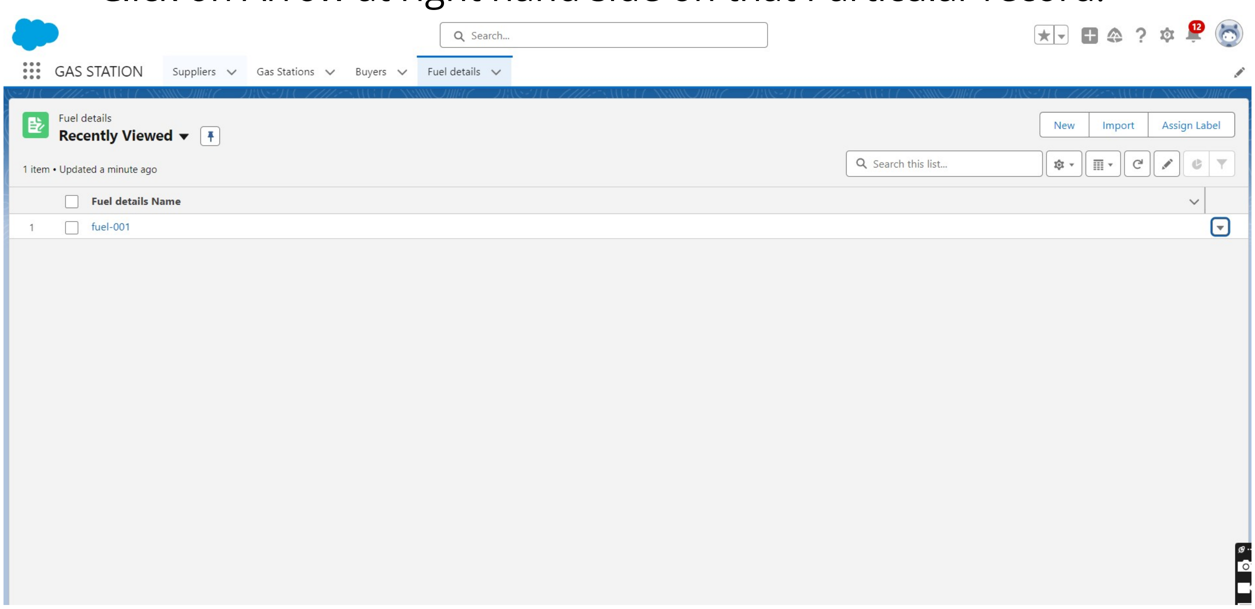
- To create a record in junction object follow these steps :

- 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.



➤ 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.

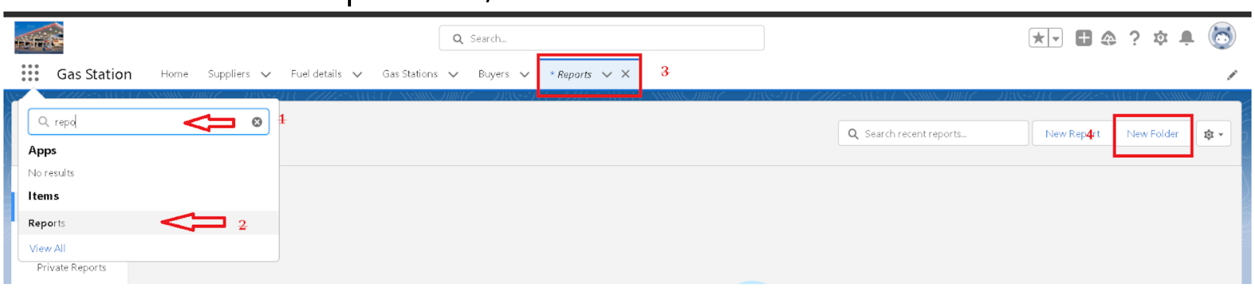
MILESTONE-13:REPORTS

What are Reports:

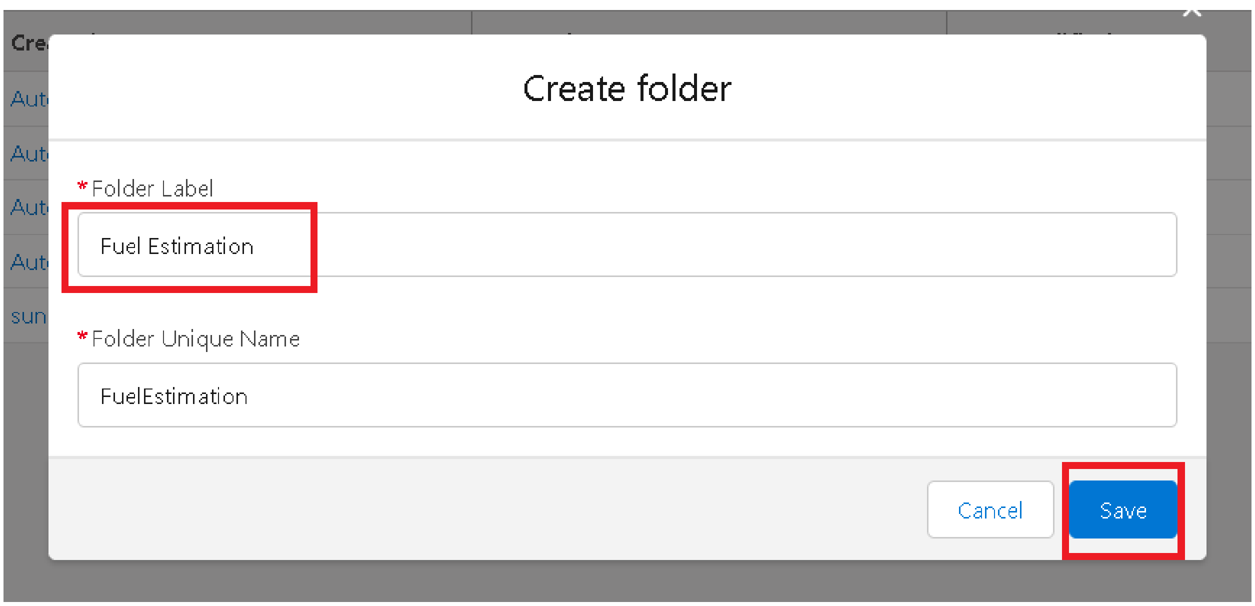
Reports in Salesforce are powerful tools that allow users to organize, analyze, and visualize their data. Salesforce reports help users make informed business decisions by providing insights into sales performance, customer behavior, operational efficiency.

➤ **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.

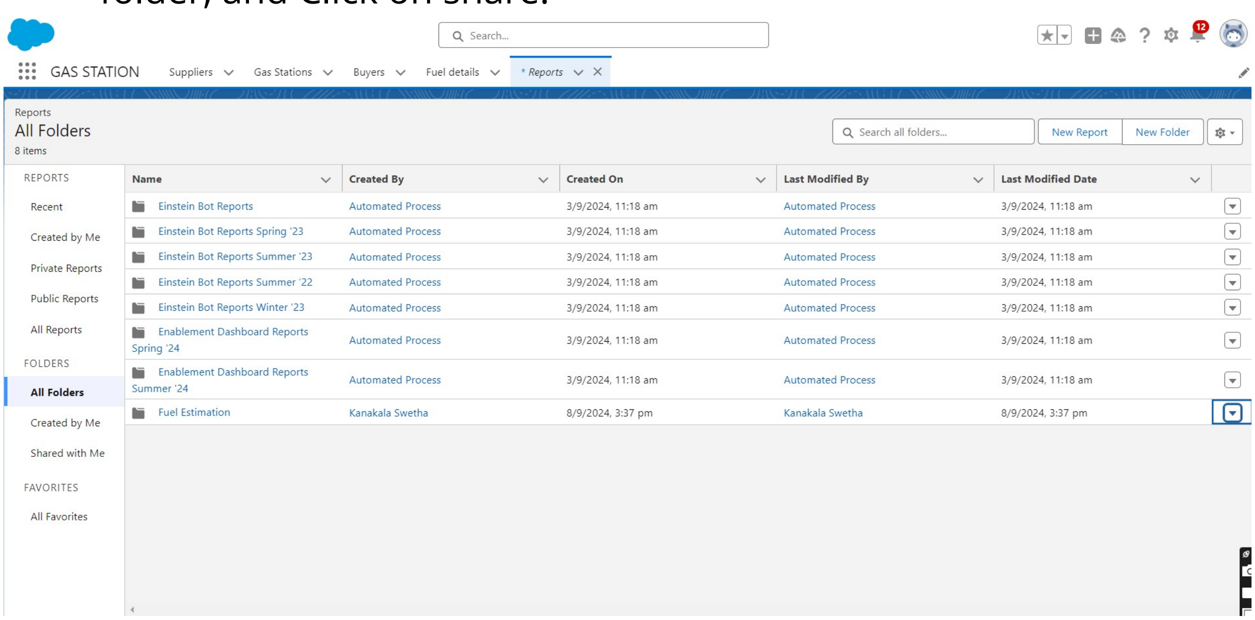


- Give the Folder label as "Fuel Estimation ", Folder unique name will be auto populated.
- Click save.



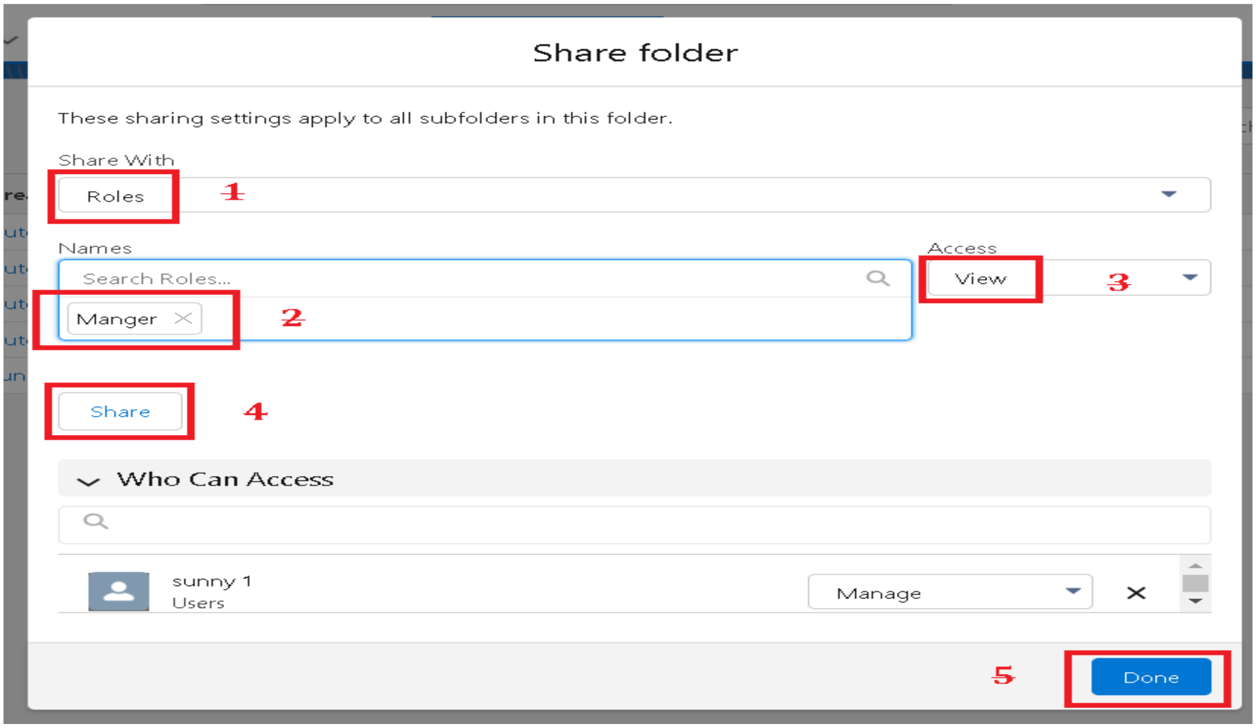
➤ Sharing a report folder:

- 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.



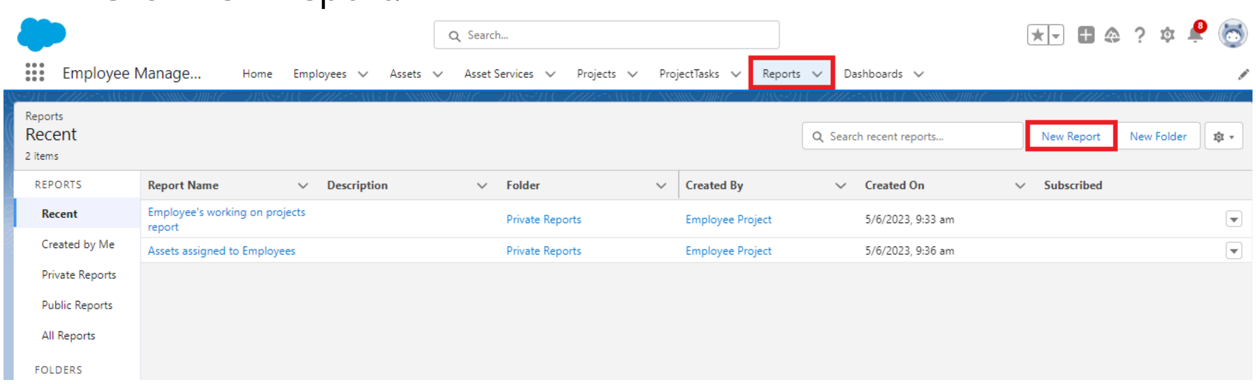
- Select the share with as “roles”, in name field search for “manager”, give “view” as access for that role.

- Then click share, and click on Done.

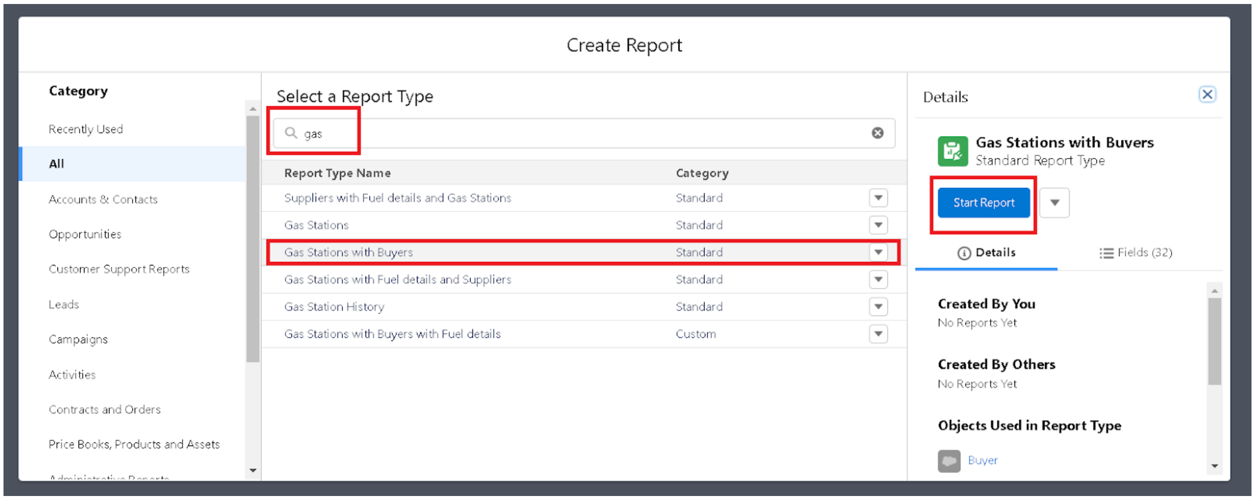


➤ Create Report:

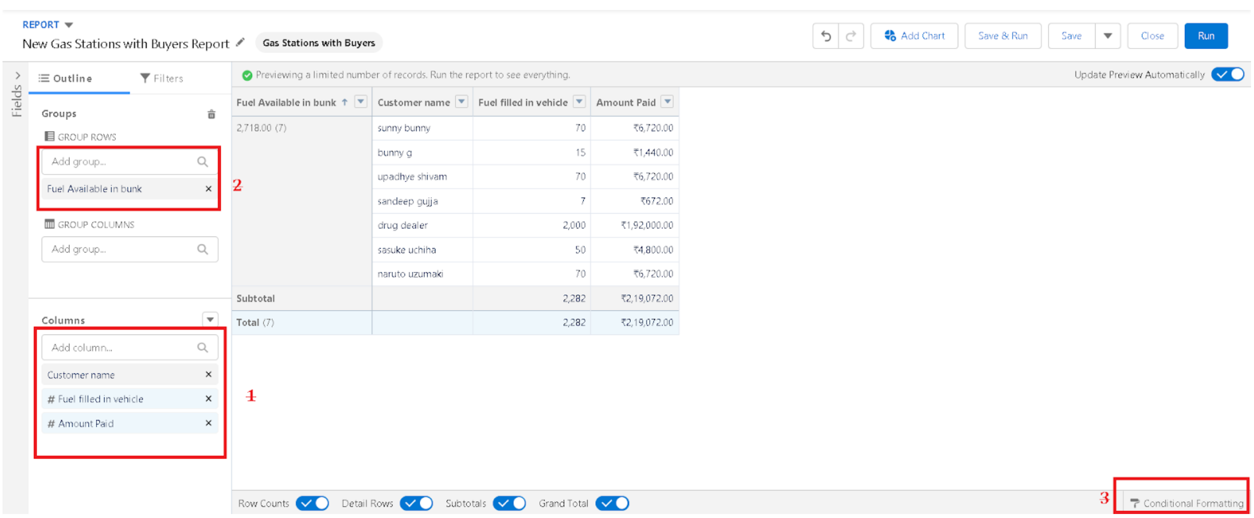
- Go to the app ? click on the reports tab
- Click New Report.



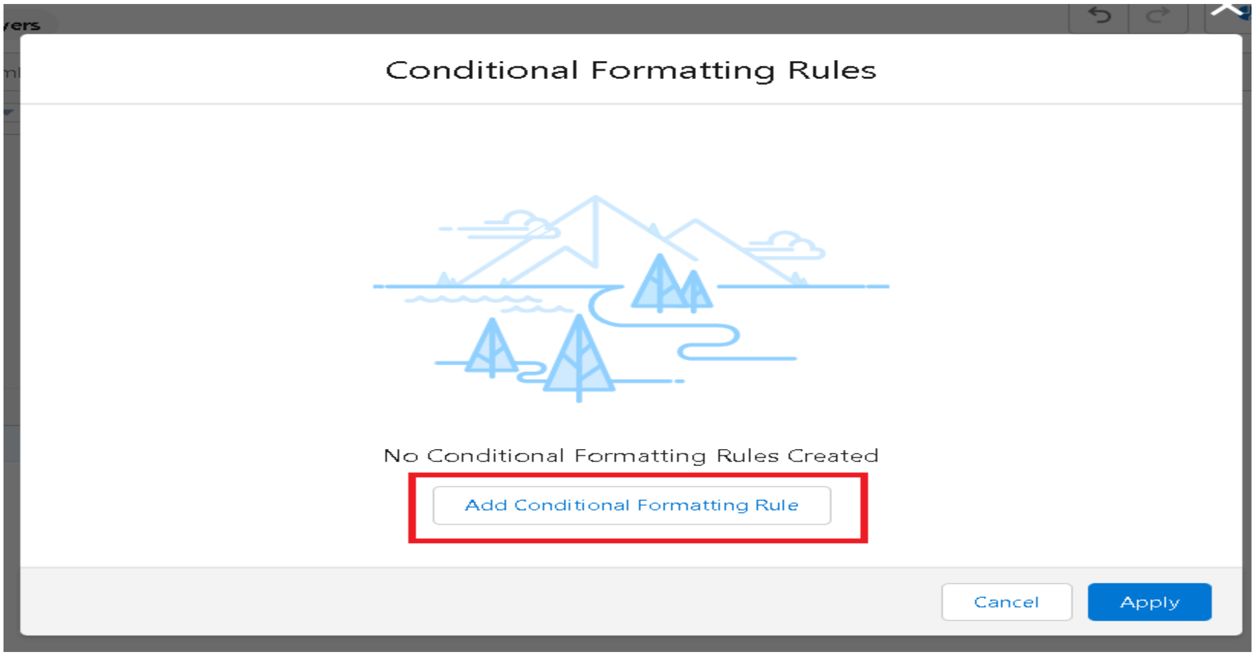
- select for report type, search for “Gas station with buyers” click on it. And click on start report.



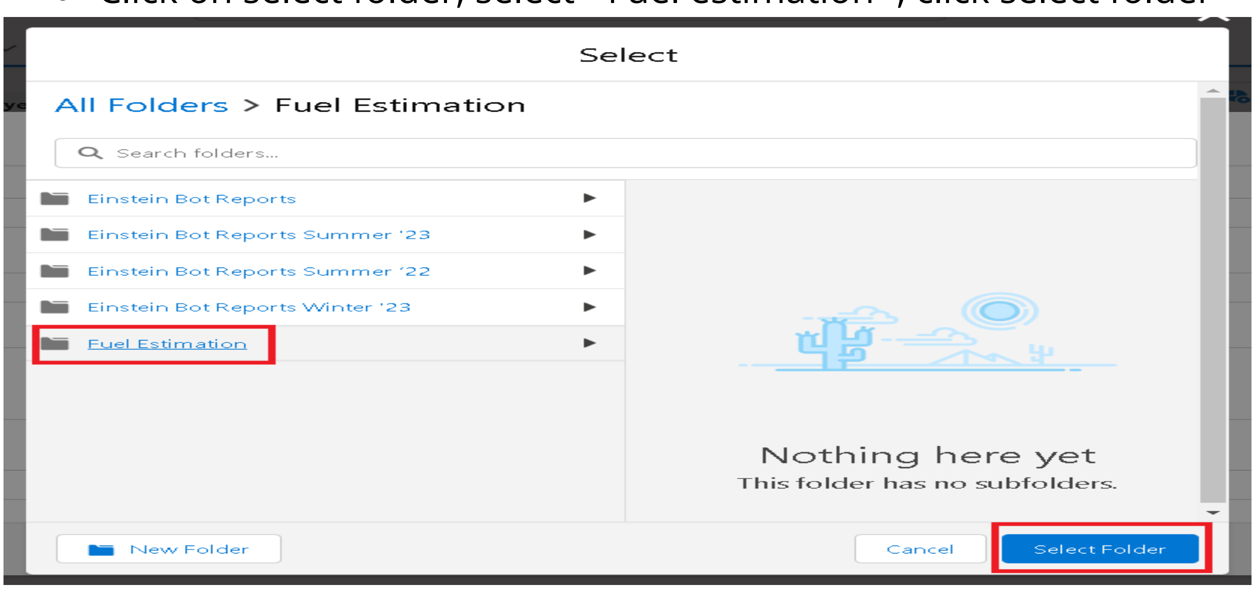
- Their outline pane is opened alredy, select the fields that mentioned below in column section.
  - Fuel filled in vehicle
  - Amount paid
- Remove the unnecessary fields.
- Select the fields that mentioned below in GROUP ROWS section.
  - Fuel Available in bunk
  - Customer name



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

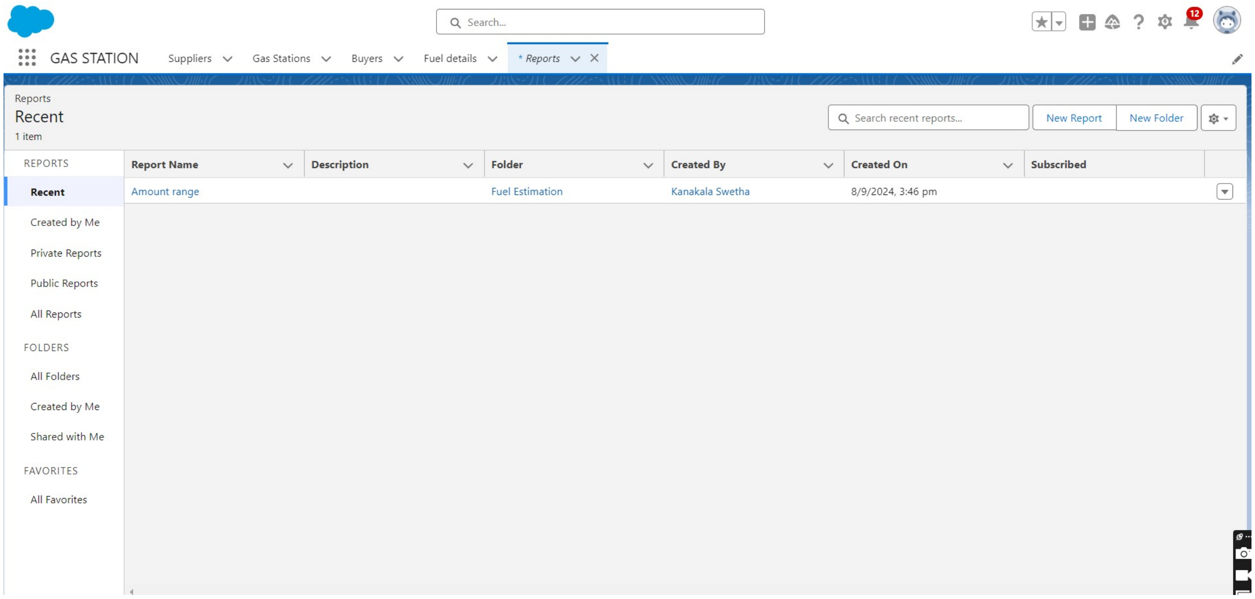


- Change the apply conditional formatting to " sum of Amount paid".
- Mention the range form " 1000 to 5000 ".
- Dont change the colours, and click on Done.
- Click apply.
- Click save, give the report name as "Amount range", report unique name will be auto populated.
- Click on select folder, select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



- Click save.

- Then the created Report is viewed.



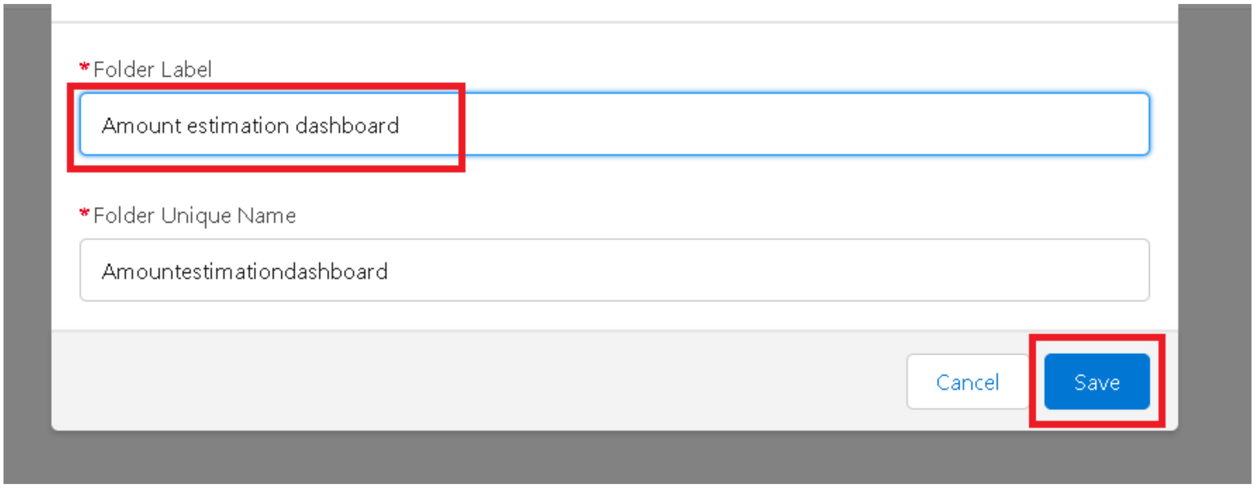
<u>MILESTONE-14:DASHBOARDS</u>

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:

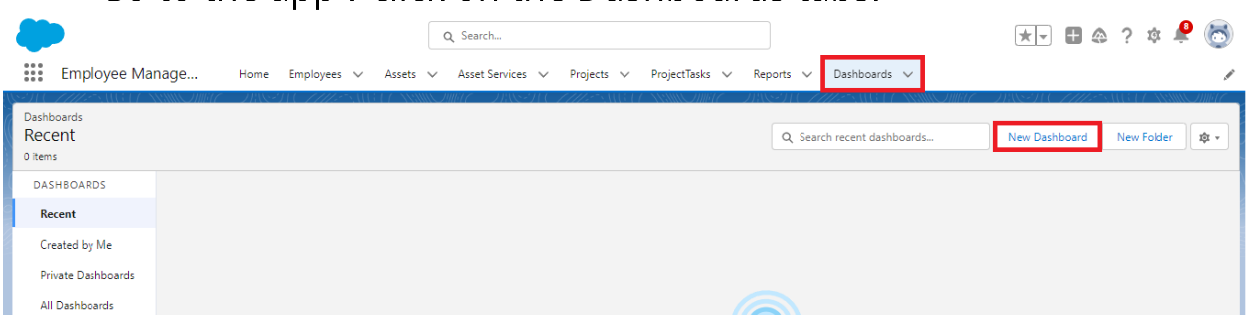
- Click on the app launcher and search for dashboard.
- Click on dashboard tab.
- Click new folder, give the folder label as “ Amount estimation dashboard”.



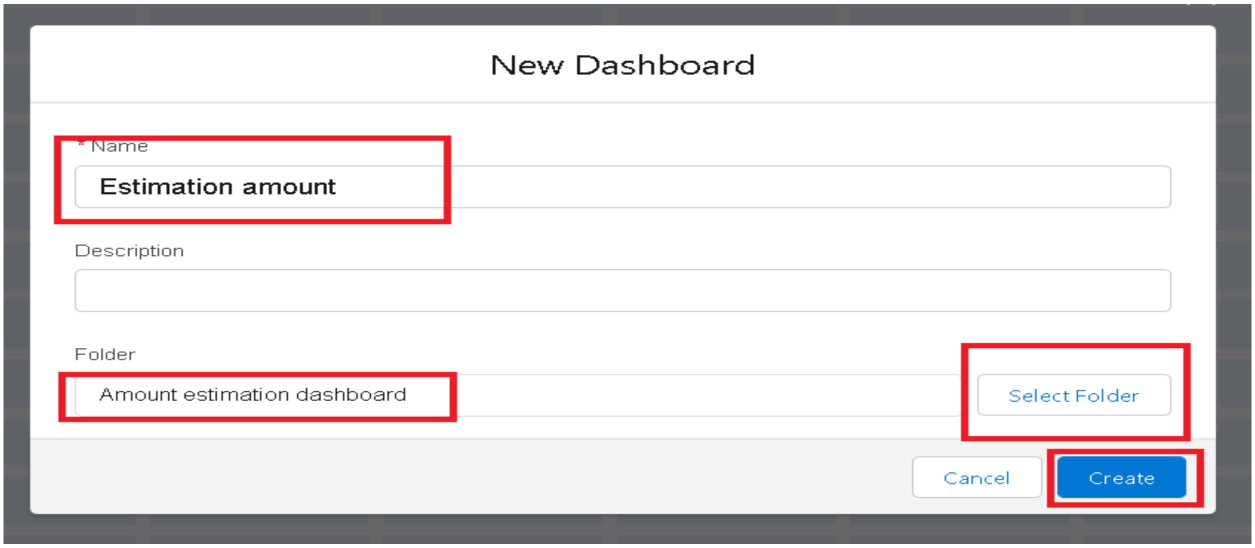
- Folder unique name will be auto populated.
- Click save.
- Follow the same steps, form milestone 12, and activity 2, and provide the sharing settings for the folder that just created.

➤ **Create Dashboard:**

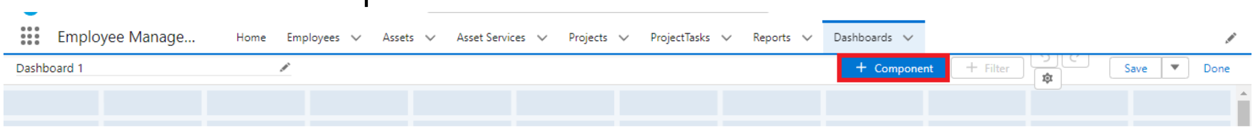
- Go to the app ? click on the Dashboards tabs.



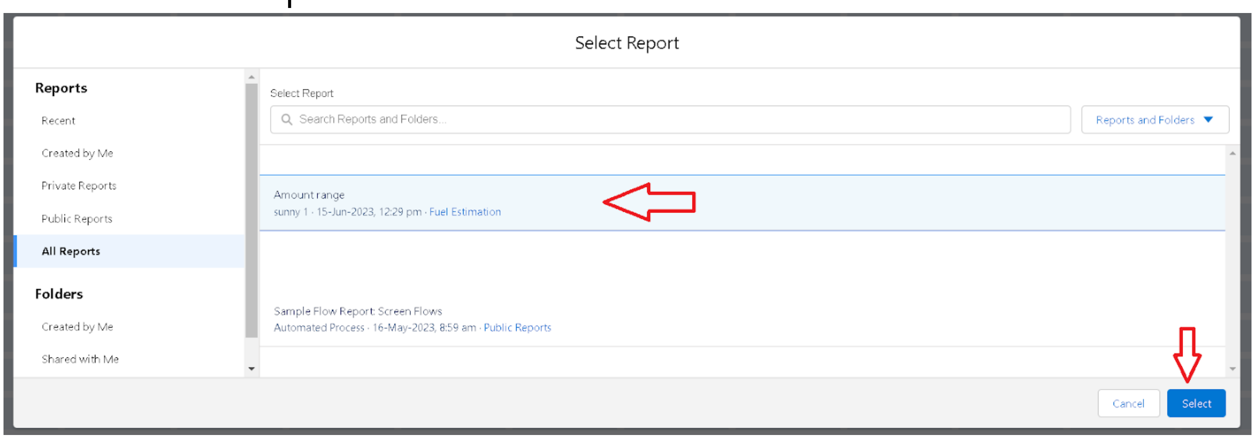
- Give a Name and select the folder that created, and click on create.



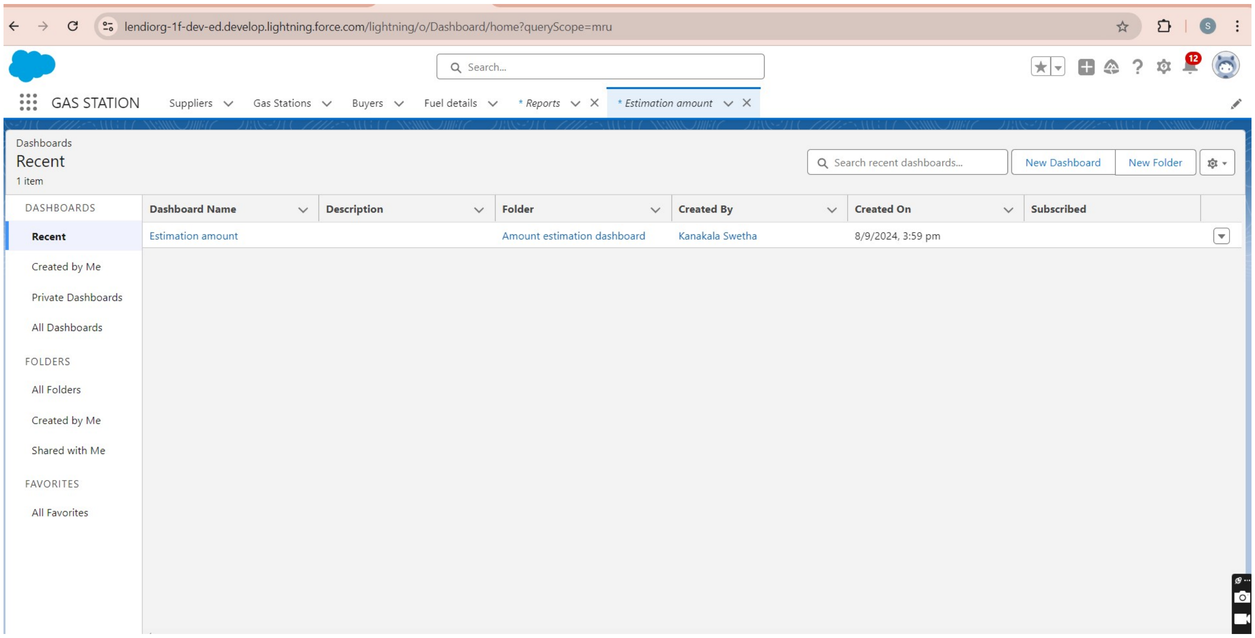
- Select add component.



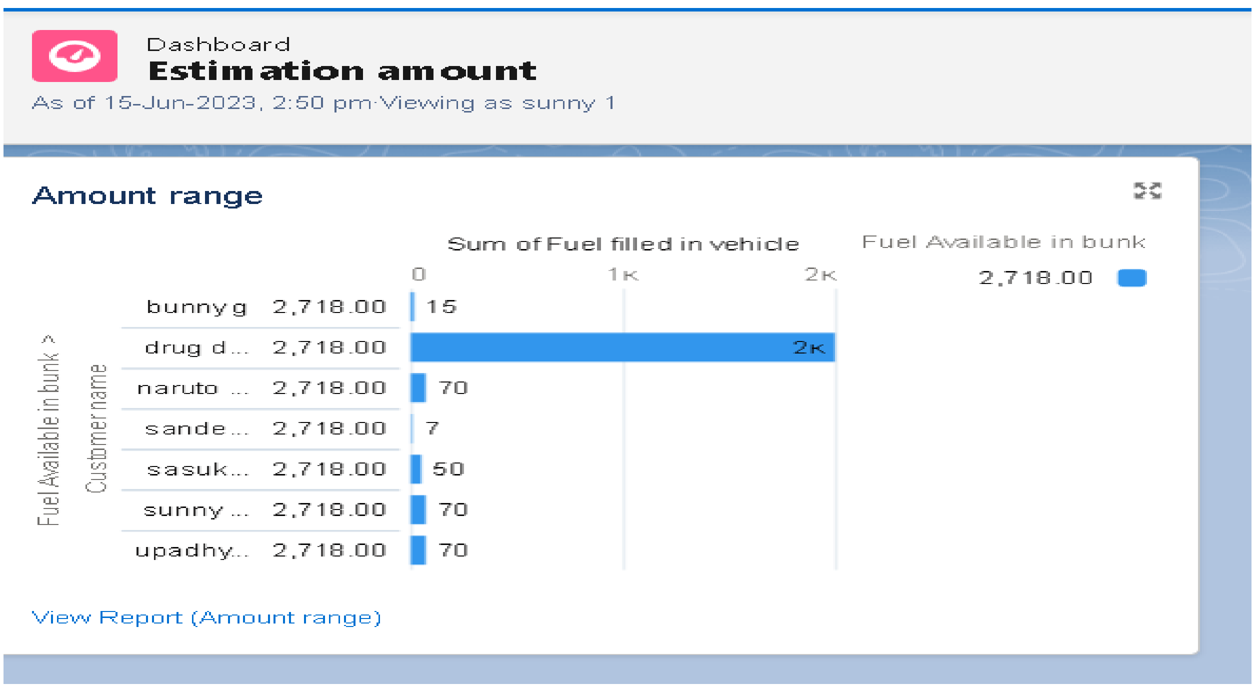
- Select a Report and click on select.



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



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



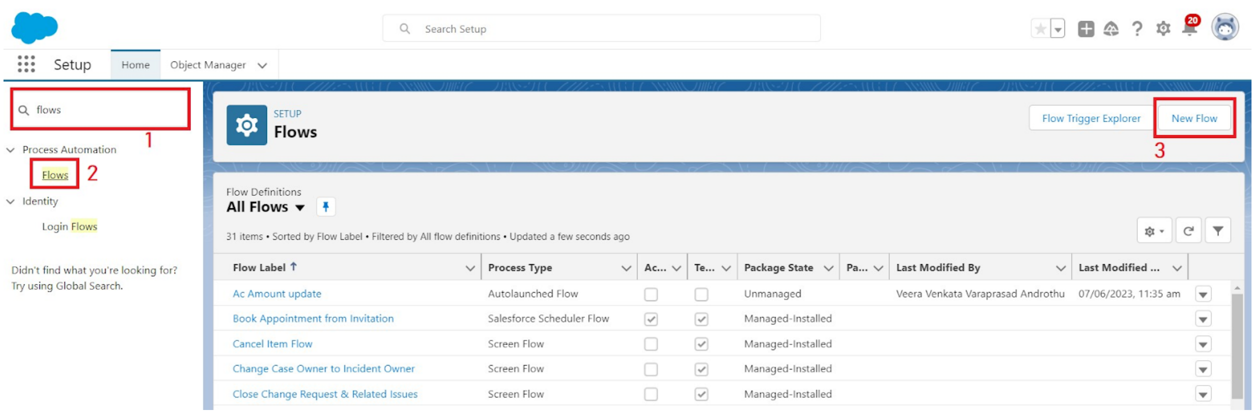
<u>MILESTONE-15:FLOWS</u>

What Flows mean:

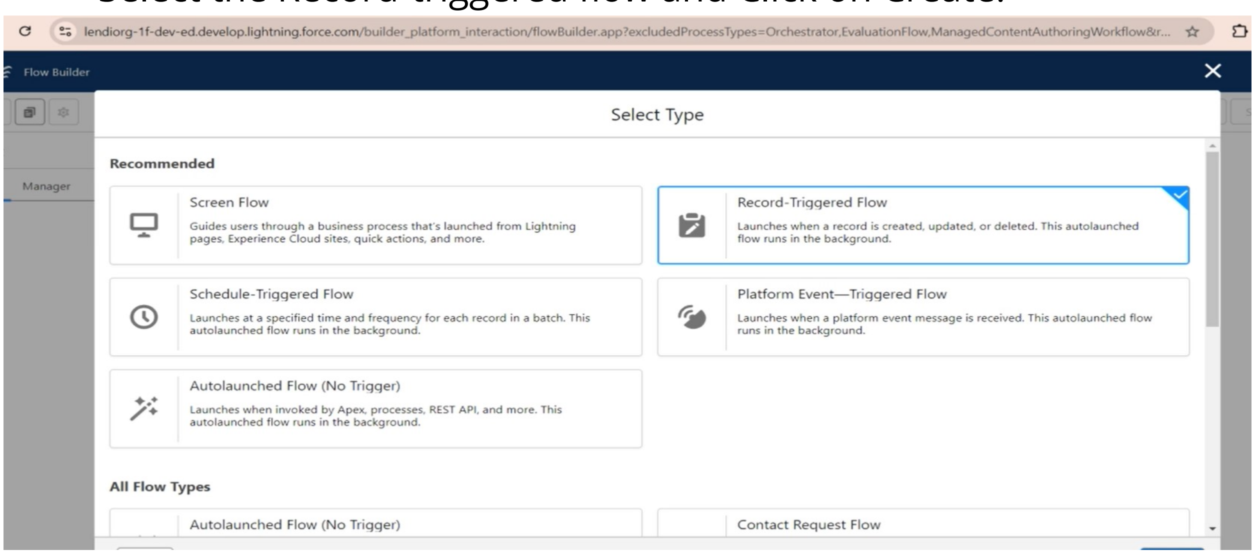
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

➤ Create a Flow:

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

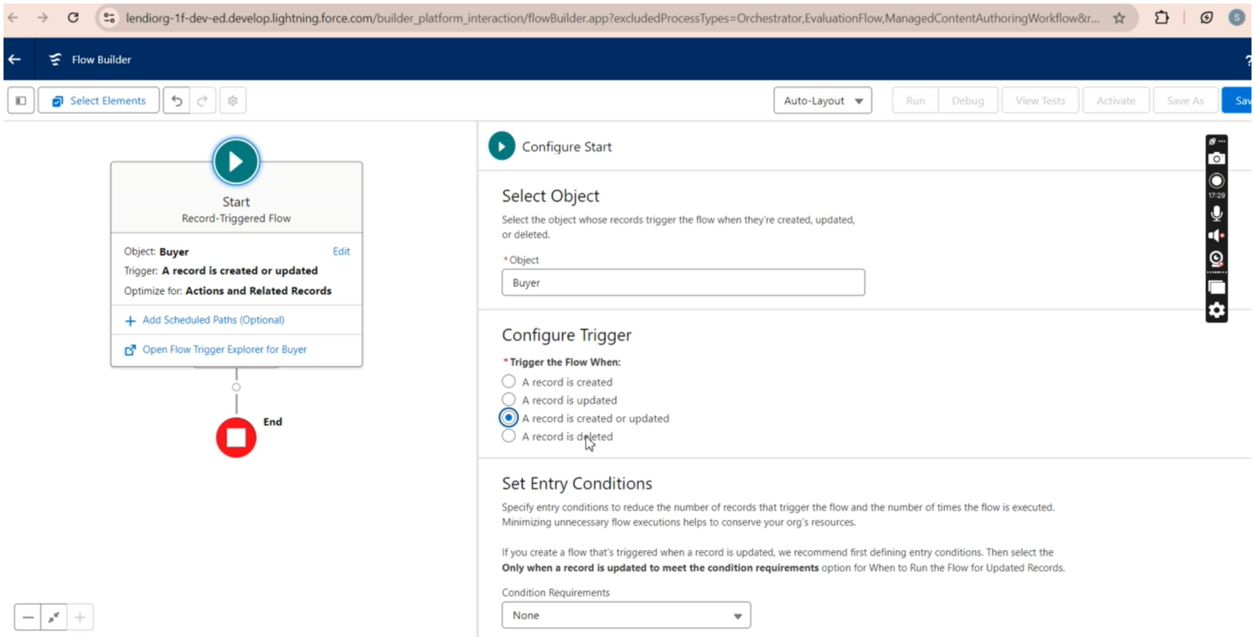


- Select the Record-triggered flow and Click on Create.



- 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 form 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 :

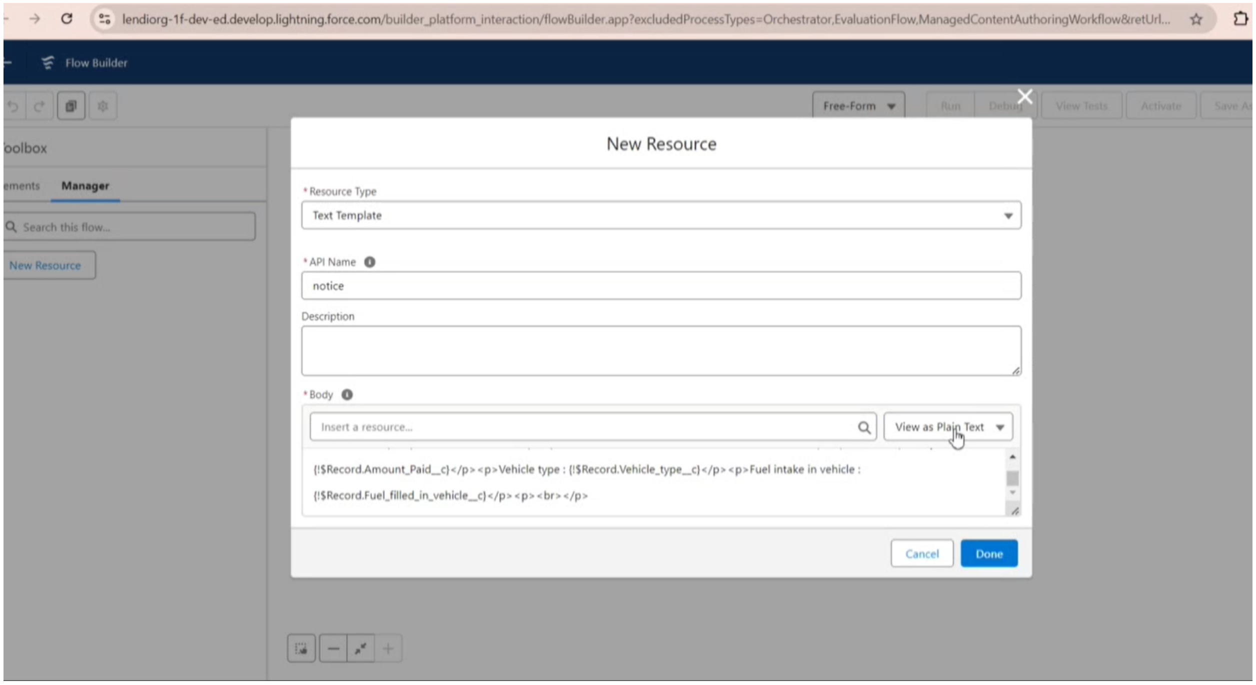
Customer name : {!$Record.Customer_name__c}

Amount paid by Customer : {!$Record.Amount_Paid__c}

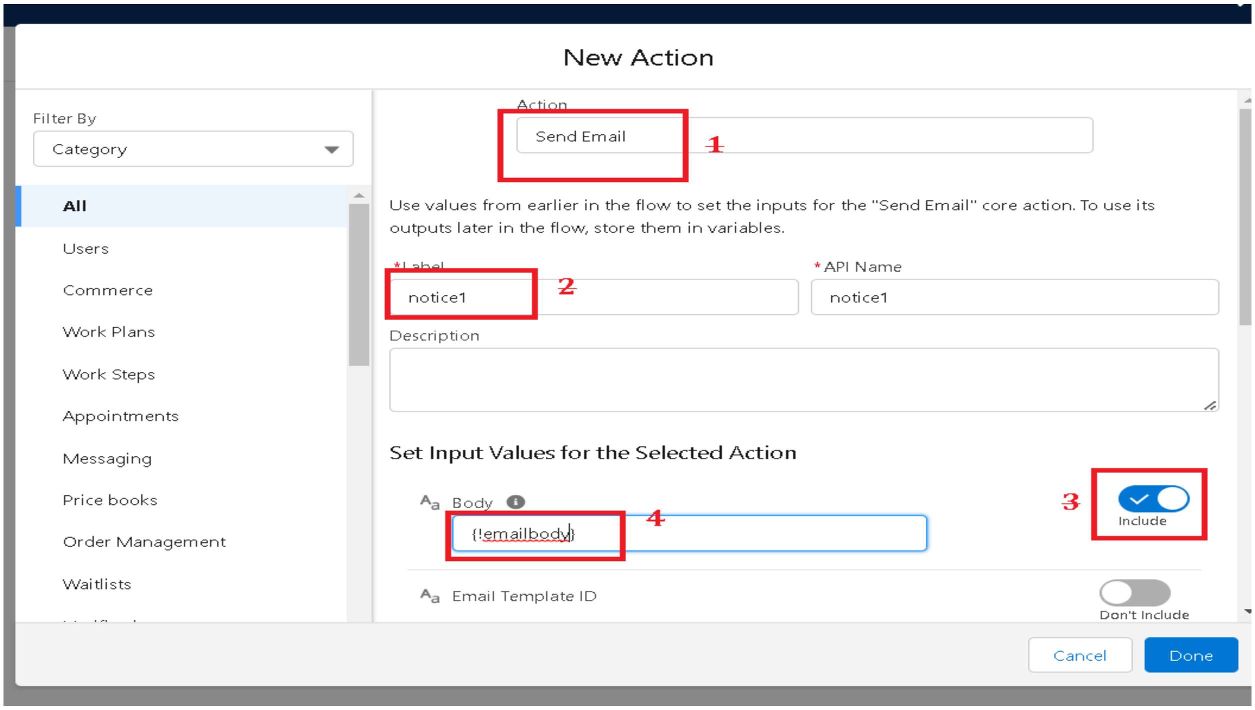
Vehicle type : {!$Record.Vehicle_type__c}

Fuel intake in vehicle : {!$Record.Fuel_filled_in_vehicle__c}

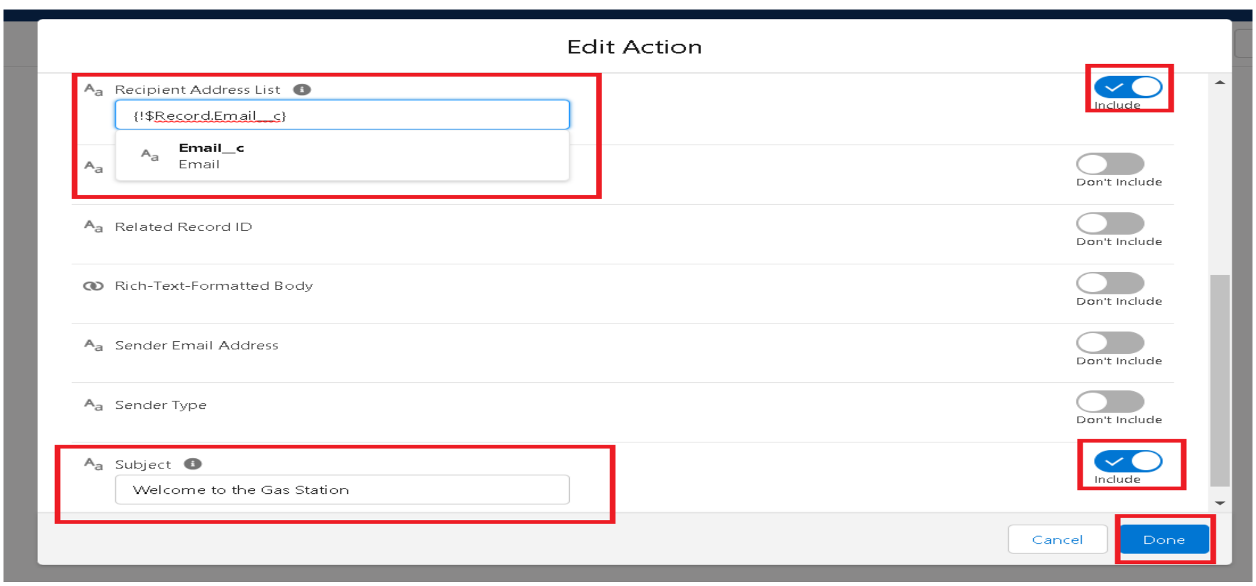
- Change the view as Rich Text ? View to Plain Text.



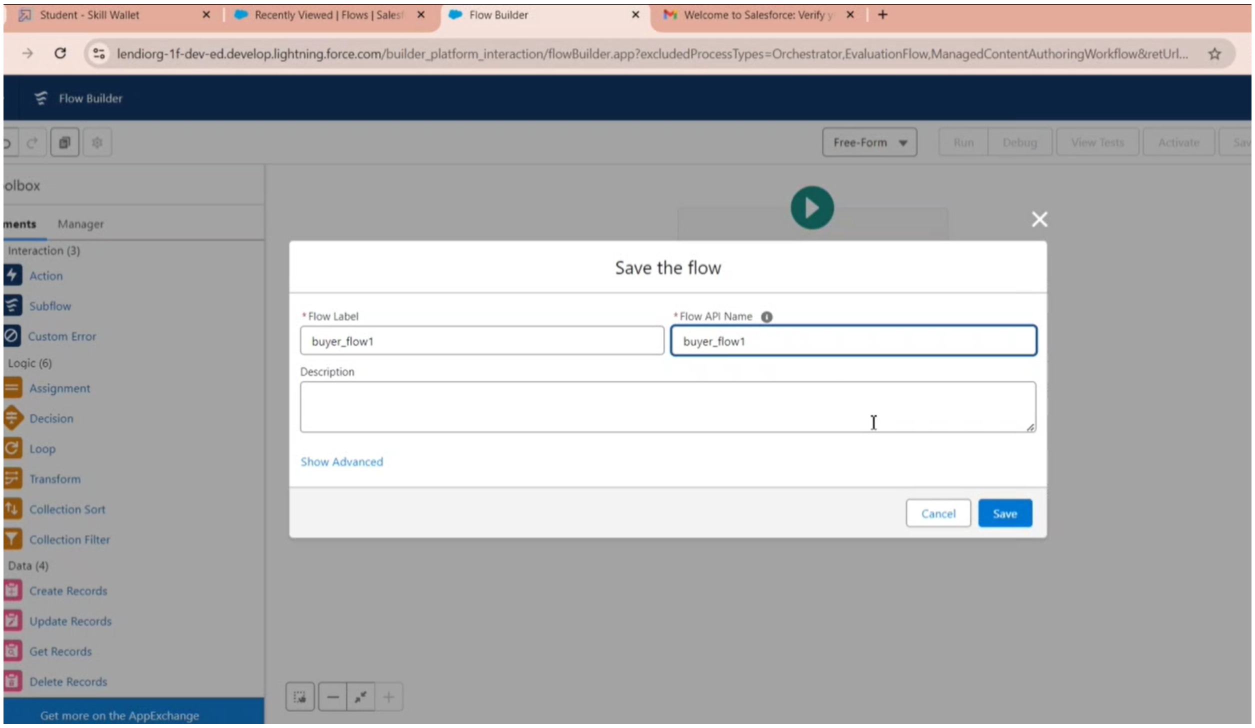
- Click done.
- Now click on elements, and drag the action element into the preview pane.
- Their action bar will be opened in that search for “ send email ” and click on it.
- Give the label name as “ notice”
- API name will be auto populated.
- Enable the body in set input values for the selected action.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



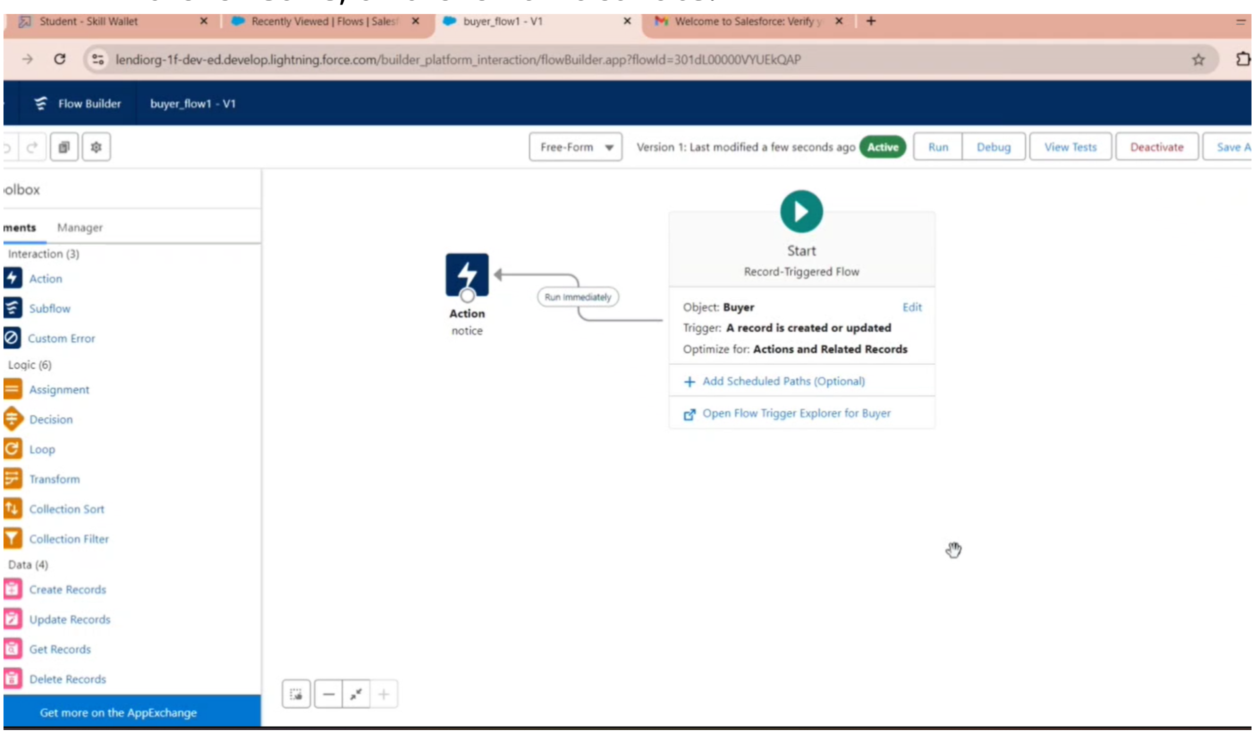
- Include recipient address list select the email form the record.
- Include subject as “ welcome to gas station”.
- Click done



- 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.