

**Application to make the gas filling station easy using CRM
(admin)**

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Abstract

This project focuses on developing an innovative application to optimize the management of gas filling stations using a Customer Relationship Management (CRM) system tailored for administrative tasks. The application aims to streamline key operational processes, including customer engagement, sales tracking, and inventory management, enhancing overall efficiency.

By leveraging a CRM platform, administrators will have access to real-time data and analytics, enabling them to monitor fuel levels, analyze sales trends, and maintain effective customer communication. Features such as automated reporting, customer feedback management, and targeted marketing campaigns will empower station managers to make informed decisions and improve customer satisfaction.

This application not only simplifies the daily operations of gas filling stations but also fosters stronger relationships with customers, driving loyalty and increasing revenue. By integrating CRM capabilities into gas station management, this project will ultimately enhance the operational effectiveness and competitiveness of filling stations in a dynamic market.

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Salesforce

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you. Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster.

1. Creating Developer Account

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Your job role

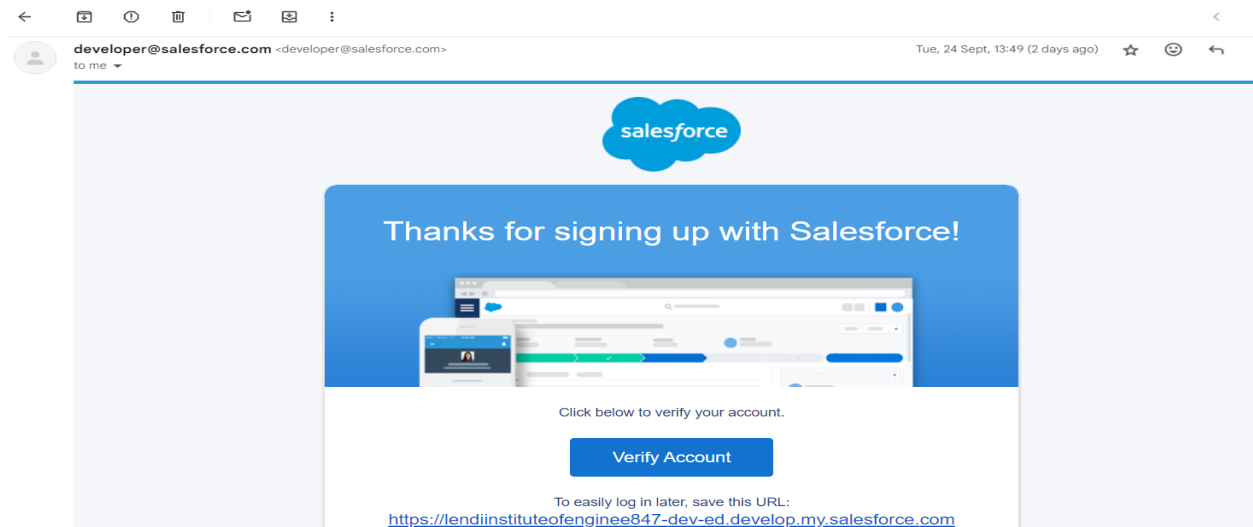
Company*
Company Name

1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. Country : India
6. Postal Code : pin code

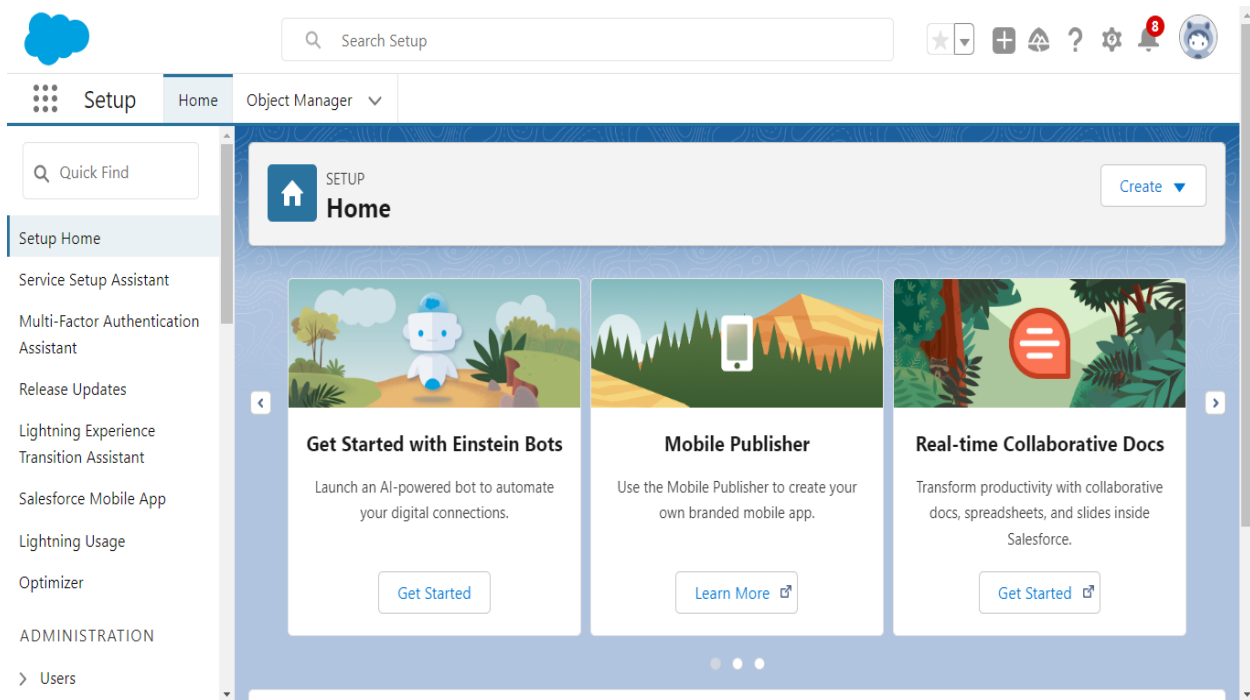
Username : should be a combination of your name and company

2.Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.
4. when you will redirect to your salesforce setup page.



2.Object

What Is an Object?

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

1.Create Supplier Object

To create an object:

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

Supplier

Custom Object Definition Edit

SaveSave & NewCancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label	<input type="text" value="Supplier"/>	Example: Account
Plural Label	<input type="text" value="Suppliers"/>	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name	<input type="text" value="Supplier Name"/>	Example: Account Name
-------------	--	-----------------------

Data Type **Warning:** If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

2.Create Gas Station Object

To create an object:

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

Gas Station

Custom Object Definition Edit

SaveSave & NewCancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label

Gas Station

Example: Account

Plural Label

Gas Stations

Example: Accounts

Starts with vowel sound

☐

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name

Gas Station

Example: Account Name

Data Type

Auto Number

Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Display Format

Gas-{000}

Example: A-{0000} [What Is This?](#)

Optional Features

☒ Allow Reports☐ Allow Activities☒ Track Field History☐ Allow in Chatter Groups☐ Enable Licensing [?](#)

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☒ Allow Search

SaveSave & NewCancel

3.Create Buyer and Fuel details Objects

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

1. Use these display format for the Buyer
 - label name ? Buyer
 - Plural label name ? Buyers
 - Display Format ? Buyer-{000}
 - Starting number ? 1
2. Use these display format for the Fuel details
 - label name ? Fuel details
 - Plural label name ? Fuel details
 - Display Format ? fuel-{000}
 - Starting number ? 1

Buyer

Custom Object Definition Edit

SaveSave & NewCancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label

Buyer

Example: Account

Plural Label

Buyers

Example: Accounts

Starts with vowel sound

☐

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name

Buyer Name

Example: Account Name

Data Type

Auto Number

Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Display Format

Buyer-{000}

Example: A-{0000} [What Is This?](#)

Fuel details

Custom Object Definition Edit

SaveSave & NewCancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label

Fuel details

Example: Account

Plural Label

Fuel details

Example: Accounts

Starts with vowel sound

☐

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name

Fuel details Name

Example: Account Name

Data Type

Auto Number

Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Display Format

fuel-{000}

Example: A-{0000} [What Is This?](#)

3.Tabs

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

Types of Tabs:

- 1.Custom Tabs
- 2.Web Tabs
- 3.Visual forcesTabs
- 4.Lightning Component Tabs
- 5.Lightning Page Tabs

1.Creating a Custom Tab

To create a Tab:(supplier)

1. Go to setup page ? type Tabs in Quick Find bar ? click on tabs ? New (under custom object tab)
2. Select Object(Supplier) ? Select the tab style ? Next (Add to profiles page) keep it as default ? Next (Add to Custom App) uncheck the include tab .
3. Make sure that Append tab to users' existing personal customizations is checked.
4. Click save.

Suppliers

Fill in the fields below to define the custom tab.

Custom Tab Definition Edit

Custom Object Tab Information ! Required Information

Tab Label	Suppliers
Object	Supplier
Tab Style	 Cell phone 

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link --None--

Enter a short description.

Description

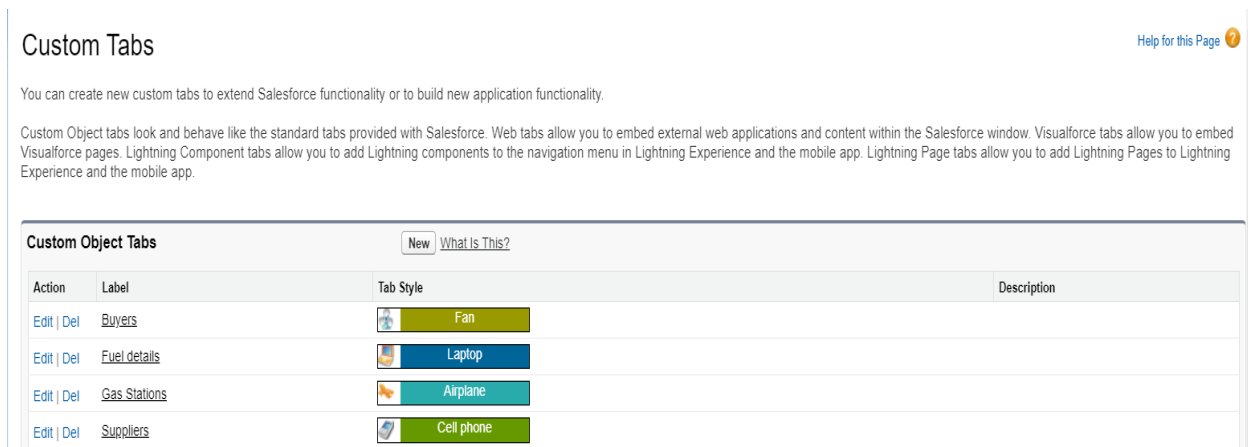
Save Cancel

2.Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “ Gas station, Buyer, Fuel details”.
2. By using the above same process create the reamaining tabs



After adding all the tabs the Custom tabs shown be like in below figure



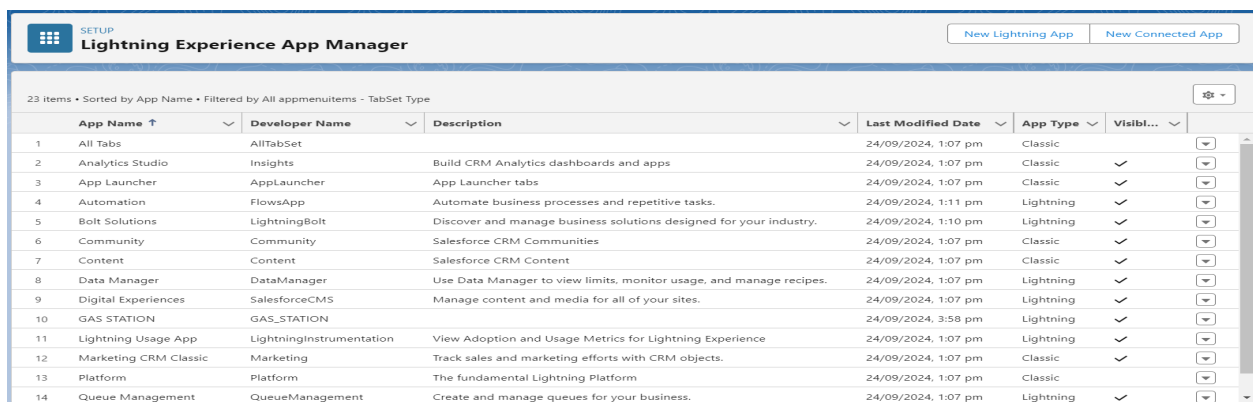
4.The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Create a Lightning App

To create a lightning app page

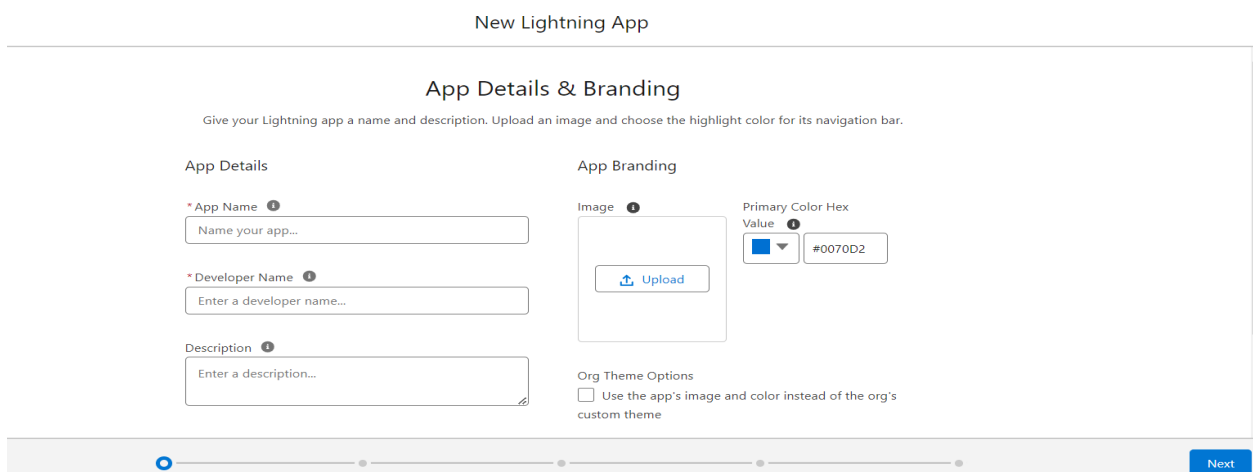
1.Go to setup page ? search “app manager” in quick find ? select “app manager” ? click on New lightning App.



The screenshot shows the 'Lightning Experience App Manager' interface. At the top, there are buttons for 'New Lightning App' and 'New Connected App'. Below the header, a table lists 23 items, sorted by App Name. The table has columns for App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. The items listed include All Tabs, Analytics Studio, App Launcher, Automation, Bolt Solutions, Community, Content, Data Manager, Digital Experiences, GAS STATION, Lightning Usage App, Marketing CRM Classic, Platform, and Queue Management.

	App Name	Developer Name	Description	Last Modified Date	App Type	Visibl...
1	All Tabs	AllTabSet		24/09/2024, 1:07 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	24/09/2024, 1:07 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	24/09/2024, 1:07 pm	Classic	✓
4	Automation	FlowsApp	Automate business processes and repetitive tasks.	24/09/2024, 1:11 pm	Lightning	✓
5	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	24/09/2024, 1:10 pm	Lightning	✓
6	Community	Community	Salesforce CRM Communities	24/09/2024, 1:07 pm	Classic	✓
7	Content	Content	Salesforce CRM Content	24/09/2024, 1:07 pm	Classic	✓
8	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	24/09/2024, 1:07 pm	Lightning	✓
9	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	24/09/2024, 1:07 pm	Lightning	✓
10	GAS STATION	GAS_STATION		24/09/2024, 3:58 pm	Lightning	✓
11	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	24/09/2024, 1:07 pm	Lightning	✓
12	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	24/09/2024, 1:07 pm	Classic	✓
13	Platform	Platform	The fundamental Lightning Platform	24/09/2024, 1:07 pm	Classic	✓
14	Queue Management	QueueManagement	Create and manage queues for your business.	24/09/2024, 1:07 pm	Lightning	✓

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



The screenshot shows the 'New Lightning App' setup page. The main heading is 'App Details & Branding'. Below this, there is a sub-heading 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' The form is divided into two main sections: 'App Details' and 'App Branding'. The 'App Details' section includes fields for 'App Name' (with a hint 'Name your app...'), 'Developer Name' (with a hint 'Enter a developer name...'), and 'Description' (with a hint 'Enter a description...'). The 'App Branding' section includes an 'Image' field with an 'Upload' button, a 'Primary Color Hex' field with a dropdown menu showing a blue color and the value '#0070D2', and an 'Org Theme Options' section with a checkbox labeled 'Use the app's image and color instead of the org's custom theme'. At the bottom of the page, there is a progress bar with four steps, and a 'Next' button is visible on the right.

App Details & Branding

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

App Details

* App Name ⓘ

* Developer Name ⓘ

Description ⓘ

App Branding

Image ⓘ

Upload

Primary Color Hex Value ⓘ

■ #0070D2

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

GS

GAS STATION

3.To Add Navigation Items:

New Lightning App

Navigation Items

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

Available Items

🔍 Type to filter list...

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

Selected Items

No items selected

Back Next

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

4.To Add User Profiles:

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles

🔍 Type to filter list...

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

Selected Profiles

No Profiles selected

Back Save & Finish

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

5.Fields

Types of Fields

1. Standard Fields
2. Custom Fields

1.Creating Junction Object

Creating junction object as Fuel details with Supplier & Gas station

To create junction object

1. Go to the setup page ? click on object manager ? From drop down click edit for Fuel details object.
2. Click on fields & relationship ? click on New.
3. Select "Master-Detail relationship" as data type and click Next.
4. Select the related object " Supplier " and click next.
5. Give Field Label as "Supplier Name" and click Next.
6. Next ? Next ? Save & New.
7. Follow the same steps from 1 to 3.
8. Select the related object " Gas station " and click Next.
9. Give Field Label as "Gas Station" and click Next.
- 10.Next ? Next ? Save.

2.Creating a Master-Detail Relationship

Creating Master-Detail Relationship between Buyer & Gas Station Object

To Create a Master-Detail relationship

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

3. Creating the number field in Fuel details object

Creating the number field in Fuel details object

1. Go to the setup page ? click on object manager ? From drop down click edit for Fuel details object.
2. Click on fields & relationship ? click on New.
3. Select Data type as “Number” and click Next.
4. Given the Field Label as “ Fuel Supplied ” and length as “ 5 ”.

The screenshot shows the 'New Custom Field' setup page for a number field. The page is titled 'Step 2. Enter the details' and 'Step 2 of 4'. It includes a 'Previous' button, a 'Next' button, and a 'Cancel' button. The form fields are as follows:

- Field Label:** Fuel Supplied
- Length:** 5 (Number of digits to the left of the decimal point)
- Decimal Places:** 0 (Number of digits to the right of the decimal point)
- Field Name:** Fuel_Supplied
- Description:** (Empty text area)
- Help Text:** (Empty text area)

Instructions: Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

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

4. Creating the Roll-up Summary

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

1. Go to setup ? click on Object Manager ? type object name(Supplier) in search bar ? click on the object.
2. Now click on “Fields & Relationships” ? New
3. Select the data type as “Rollup summary”, and click Next.
4. Give the Field label as “ sum of Fuel supplied”, Field Name will be Auto generated, and click Next.
5. Select the summarized object as “ Fuel details ”.
6. Select the Rollup type as “sum”.
7. Select the field to aggregate as “ Fuel supplied ”, and click Next ? Next ? Save.

8. Follow the same steps for the Gas station Object from 1 to 3
9. Give the Field label as " Fuel supplied to bunk ",Field Name will be Auto generated, and click Next.
- 10.Select the summarized object as " Fuel details ".
- 11.Select the Rollup type as "sum".
- 12.Select the field to aggregate as " Fuel supplied ", and click Next ? Next ? Save.
- Note :** create the field as " Fuel filled in vehicle " using number datatype in Buyer
- 13.Follow the same steps for the Gas station Object from 1 to 3
- 14.Give the Field label as " Fuel used ",Field Name will be Auto generated, and click Next.
- 15.Select the summarized object as " Buyer".
- 16.Select the Rollup type as "sum".
- 17.Select the field to aggregate as " Fuel filled in vehicle ", and click Next ? Next ? Save.

5.Creating Formula Field in Gas Station Object

1. Go to setup ? click on Object Manager ? type object name(Gas station) in search bar ? click on the object.
2. Click on fields & relationship ? click on New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Fuel Available in bunk" and select formula return type as "Number" and click next.
5. Under Advanced Formula write down the formula and click "Check Syntax" and Save.
6. Insert field formula should be : Fuel_supplied_to_bunk__c - Fuel_Used__c

7.Creating the Formula field in Buyer Object

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

6. Creating Cross Object Formula Field in Buyer Object

1. Go to setup ? click on Object Manager ? type object name(Buyer) in search bar ? click on the object.
2. Click on fields & relationship ? click on New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Amount Paid " and select formula return type as "Number" and click next.
5. Insert fields formula should be :
`Fuel_filled_in_vehicle__c * Gas_Station_name__r.Fuel_price_liter__c`
6. Under Advanced Formula write down the formula and click "Check Syntax" and Save.

7. Creating Picklist Field in Buyer Object

1. Go to setup ? click on Object Manager ? type object name(Buyer) in search bar ? click on the object.
2. Click on fields & relationship ? click on New.
3. Select Data type as "Picklist" and click Next.
4. Enter Field Label as "Vehicle type", under values select "Enter values, with each value separated by a new line" and enter values as shown below.
5. The values are: two wheeler, three wheeler, four wheeler, six wheeler, eight wheeler and Others.
6. Click Next.
7. Next ? Next ? Save & New.
8. Repeat the process 1 and 2 steps .
9. Enter Field Label as "Mode of payment", under values select "Enter values, with each value separated by a new line" and enter values as shown below.
10. The values are : credit card, debit card, net banking, upi, cash.
11. Click Next.
12. Next ? Next ? Save & New.

8. Creating the validation rule

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

3. Enter the Rule name as "Phone ".
4. Insert the Error Condition Formula as : -
NOT(REGEX(Phone_Number__c , "[6-9]{1}[0-9]{9}"))).
5. Enter the Error Message as " incorrect data", select the Error location as Field and select the field as "phone number", and click Save.

9.Creating Remaining Fields in Objects

Creating Remaining Fields In Objects

s.no	Object name	Fields	
1	Fuel details	Field Name	Data type
		Fuel supplied	number
		Supplier name	Master details
		Gas station	Master details
2	Supplier	Sum of fuel supplied	Rollup summary (Fuel detail object)
3	Gas station	Fuel supplied to bunk	Rollup summary (Fuel detail object)
		Fuel Price/litre	Number (length = 5)
4	Buyer	First name	Text
		Last name	Text
		Customer name	Formula
		Phone number	phone
		email	email
		Fuel filled in vehicle	Number (length = 5)
		Vehicle type	picklist values <ul style="list-style-type: none"> • Two wheeler • Three wheeler • Four wheeler • Six wheeler • Eight wheeler • others
		Mode of payment	Picklist values <ul style="list-style-type: none"> • Credit card • Debit card • Net banking • UPI • Cash
		Amount paid	Formula

Check once if all remaining fields in objects are created or not.

6. Page layouts

creating the page layout

To Create a Page layout:

1. Go to Setup ? Click on Object Manager ? Search for the object (Buyer) ? From drop down select the object and click on it.
2. Click on Page layout ? Click on New.
3. Select the existing page layout, and give the page layout name as “customer layout”, and click save.

Create New Page Layout

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: Buyer Layout
Page Layout Name: customer layout

Save Cancel

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

Buyer Layout

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

Fields

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists
- Dashboard Charts

Quick Find Field Name

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	

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

Persoanl details

First name	Sample Text
Last name	Sample Text
Customer Name	Sample Text
Phone number	1-415-555-1212
email	sarah.sample@company.com
Gas Station name	Sample Text

vehicle info

Fuel filled in vehicle	87,172
Vehicle type	Sample Text

Recepit details

Mode of payment	Sample Text
Amount Paid	103.74

7.Profiles

1.To create a new profile:

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

Clone Profile Help for this Page ?

Enter the name of the new profile.

You must select an existing profile to clone from. ! Required Information

Existing Profile	Standard User
User License	Salesforce
Profile Name	<input type="text" value="Manager"/>

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

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

Profile Help for this Page ?

Standard User

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(0\)](#) | [Enabled Apex Class Access \(0\)](#) | [Enabled Visualforce Page Access \(0\)](#) | [Enabled External Data Source Access \(0\)](#) | [Enabled Named Credential Access \(0\)](#) | [Enabled External Credential Principal Access \(0\)](#) | [Enabled Custom Metadata Type Access \(0\)](#) | [Enabled Custom Setting Definitions Access \(0\)](#) | [Enabled Flow Access \(0\)](#) | [Enabled Service Presence Status Access \(0\)](#) | [Enabled Custom Permissions \(0\)](#)

Profile Detail

Name	Standard User		
User License	Salesforce	Custom Profile	<input type="checkbox"/>
Created By	salesforce.com, inc., 24/09/2024, 1:07 pm	Modified By	Lenka Urmila, 26/09/2024, 11:22 am

Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>
GAS STATION (GAS_STATION)	<input type="checkbox"/>	<input checked="" type="radio"/>	Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="radio"/>	Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Marketing CRM Classic (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input checked="" type="checkbox"/>	<input type="radio"/>

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

5.Change the session times out after should be “ 8 hours of inactivity”.

6.Change the password policies as mentioned :

7.User passwords expire in should be “ never expires ”.

8.Minimum password length should be “ 8 ”, and click save.

2.sales executive Profile

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

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

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

Session Settings

- 5.And click save.

3.sales person Profile

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

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

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

5. And click save.

8.Role & Role Hierarchy

1.Creating Manager Role

Creating Manager Role:

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

The screenshot shows the 'Roles' setup page. On the left is a sidebar with a search bar containing 'roles' and a navigation menu with 'Users', 'Roles' (highlighted), 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main content area is titled 'Understanding Roles' and includes a 'Sample Role Hierarchy' diagram. The diagram shows a hierarchy starting with 'Executive Staff' (CEO, President, CFO, VP, Sales) at the top. Below this are three branches: 'Western Sales Director', 'Eastern Sales Director', and 'International Sales Director'. Each director branch further divides into specific sales representatives (e.g., CA Sales Rep, NY Sales Rep, Asian Sales Rep). To the right of the diagram are three text boxes explaining permissions for each level. At the bottom right, there are buttons for 'Set Up Roles' and a checkbox for 'Don't show this page again'.

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

The screenshot shows the 'Creating the Role Hierarchy' page. It features a title 'Creating the Role Hierarchy' and a subtitle 'You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.' Below this is a section titled 'Your Organization's Role Hierarchy' with a 'Show in tree view' dropdown. The main content area displays a tree view of the role hierarchy for 'Lendi Institute of Engineering and Technology'. The tree shows a hierarchy starting with 'Lendi Institute of Engineering and Technology' at the top, followed by 'CEO', and then 'Add Role' under the CEO. The 'Add Role' button is highlighted. On the right side, there is a 'Help for this Page' link.

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

The screenshot shows the 'Role Edit' form. The form is titled 'Role Edit' and has a 'New Role' section. In this section, the 'Label' field is set to 'Manager'. The 'Role Name' field is also set to 'Manager'. The 'This role reports to' field is set to 'CEO'. The 'Role Name as displayed on reports' field is empty. At the bottom of the form, there are three buttons: 'Save', 'Save & New', and 'Cancel'.

2.Creating another roles

Creating another two roles under manager

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



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

Role Edit

New Role

Role Edit

Label	<input type="text" value="sales executive"/>
Role Name	<input type="text" value="sales_executive"/>
This role reports to	<input type="text" value="Manager"/>
Role Name as displayed on reports	<input type="text"/>

- 4.Repeat the same steps,another role.
- 5.Click plus on CEO role, and click plus on manager, and click add role under sales
- 6.give Label as “sales person” and Role name gets auto populated.
- 7.click on save.

9.Users

1.Create User

1. Go to setup ? type users in quick find box ? select users ? click New user.
2. Fill in the fields
 1. First Name : Niklaus
 2. Last Name : Mikaelson
 3. Alias : Give a Alias Name
 4. Email id : Give your Personal Email id
 5. Username : Username should be in this form: text@text.text
 6. Nick Name : Give a Nickname
 7. Role : Manager
 8. User licence : Salesforce
 9. Profiles : Manager

SETUP
Users

New User

User Edit Save Save & New Cancel

General Information

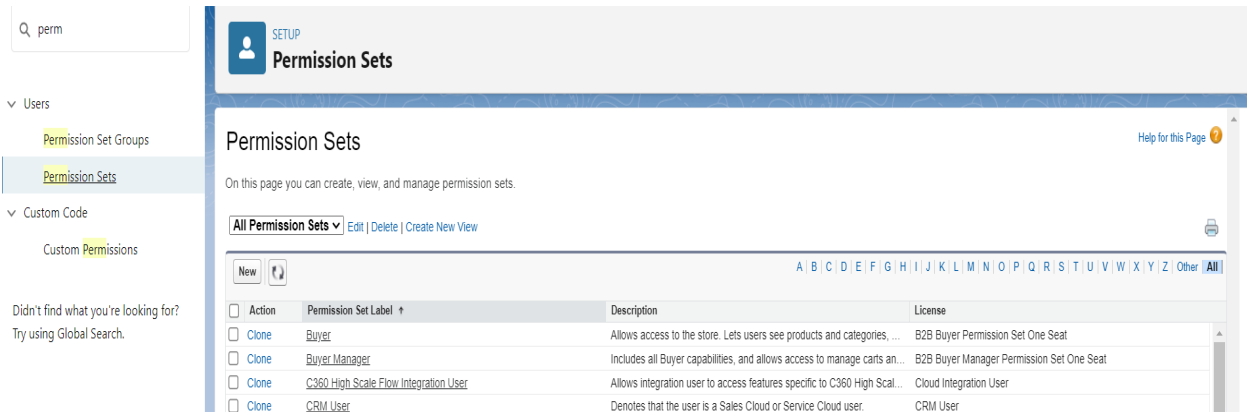
First Name	Niklaus
Last Name	Mikaelson
Alias	mik
Email	urmilalenska92@gmail.com
Username	urmilalenska9@gmail.com
Nickname	User172736943979163159
Title	
Company	
Department	
Division	

2.creating another users

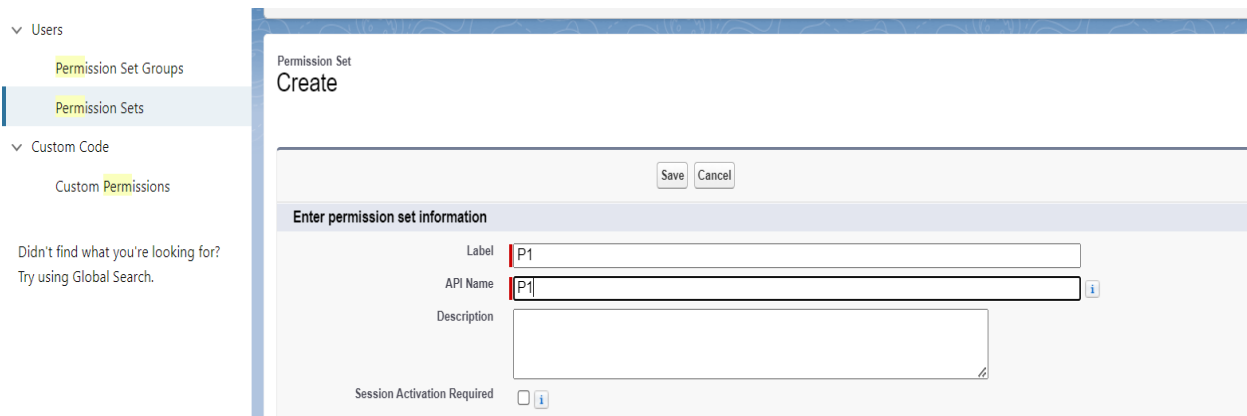
1. Follow the same steps from above activity and create another user using
 1. Role : sales executive
 2. User licence : Salesforce Platform
 3. Profile : sales executive
2. Repeat the steps and create another user using
 1. Role : sales person
 2. User licence : Salesforce Platform
 3. Profile : sales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

10. Permission sets

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



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



3. Under Apps Select object settings.
4. Click on Fuel details object ? click on Edit ? under object permission check for read and create.
5. Click on Save.
6. After saving the permission click on the Manage assignment
7. Now click on the Add Assignment.
8. Now select the users which you have created in user milestone, using sales executive profile and click on Next ? Assign? Done.

11.Setup For OWD

Create OWD Setting

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

Q sharing

Security

Guest User Sharing Rule Access Report

Sharing Settings

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

SETUP

Sharing Settings

Help for this Page

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects

Disable External Sharing Model

Default Sharing Settings

Organization-Wide Defaults

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	✓

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

Lead	Public Read/Write	Private	✓
Gas Station	Public Read Only	Private	✓
Supplier	Public Read Only	Private	✓

Other Settings

3.Click save.

4.Extra information, By these every profile has their own access, according to their profile.

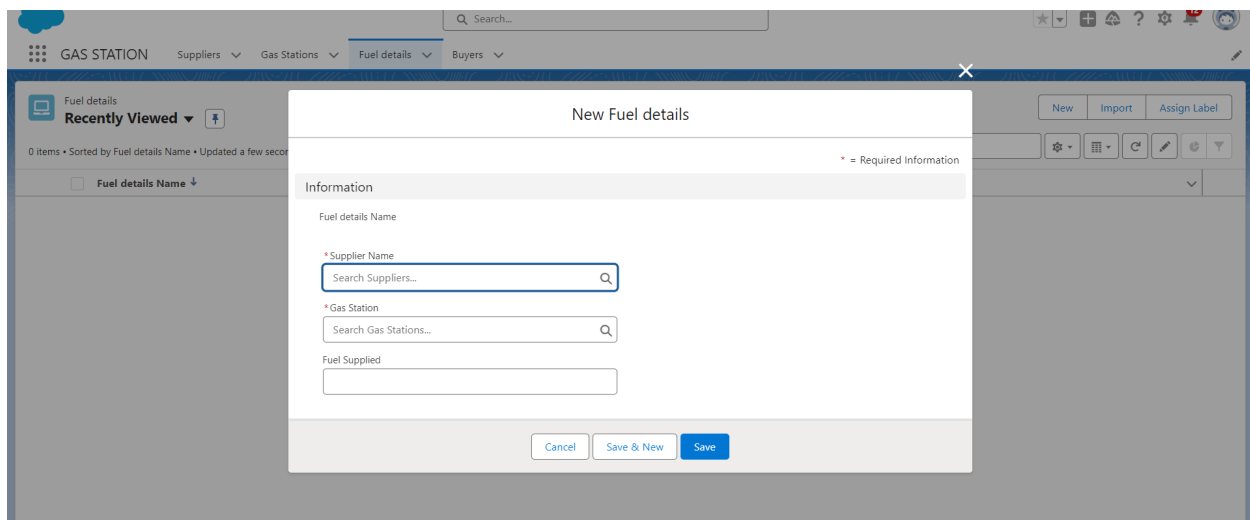
5.But in our case we created a roles and given the roles in such a way that manager can see sales executive and sales person records , sales executive can see the sales person records.

12.User Adoption

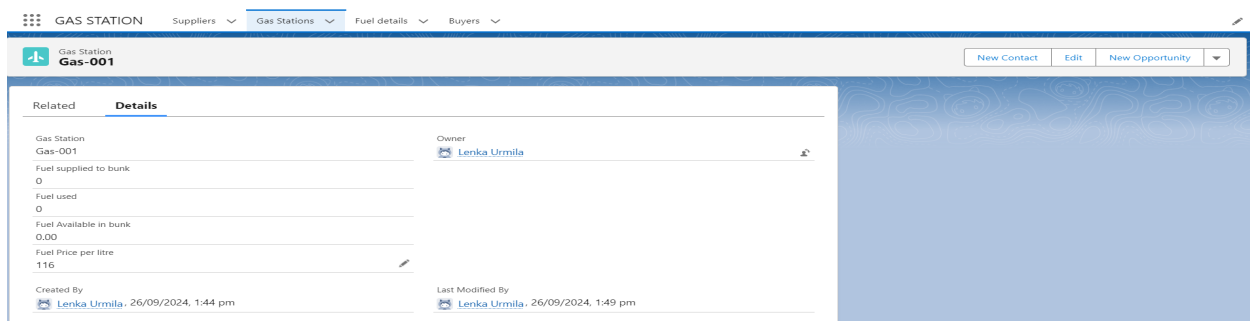
1.create a record

To create a record in junction object follow these steps

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



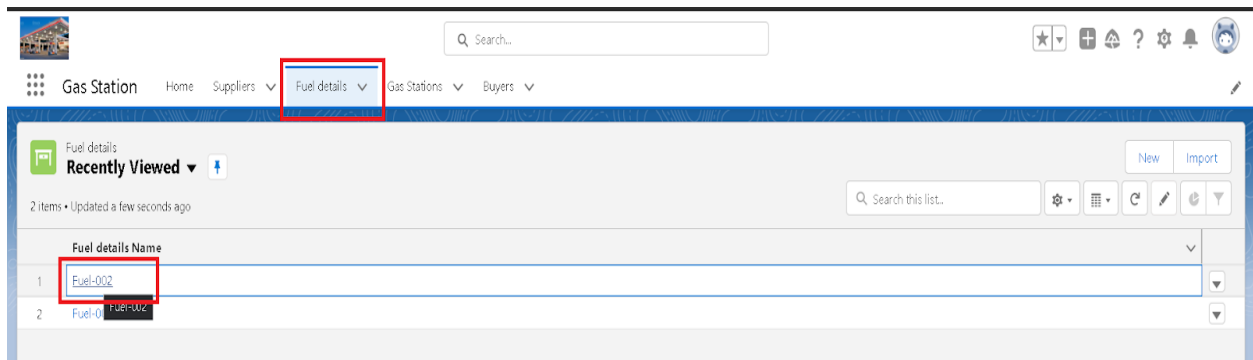
5. Creating the supplier record in fuel detail record, by clicking the “ new supplier ”.
6. Fill the details in supplier record and click on save.
7. Creating the Gas station record in fuel details record, by clicking on new gas station.
8. Fill the details in gas station record, Click save.
9. Fill the remaining details in fuel detail record , and click save.
- 10.Followed by these create 10 more records in Buyer object.



2.View a record

To create a record in junction object follow these steps

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



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

3.Delete a record

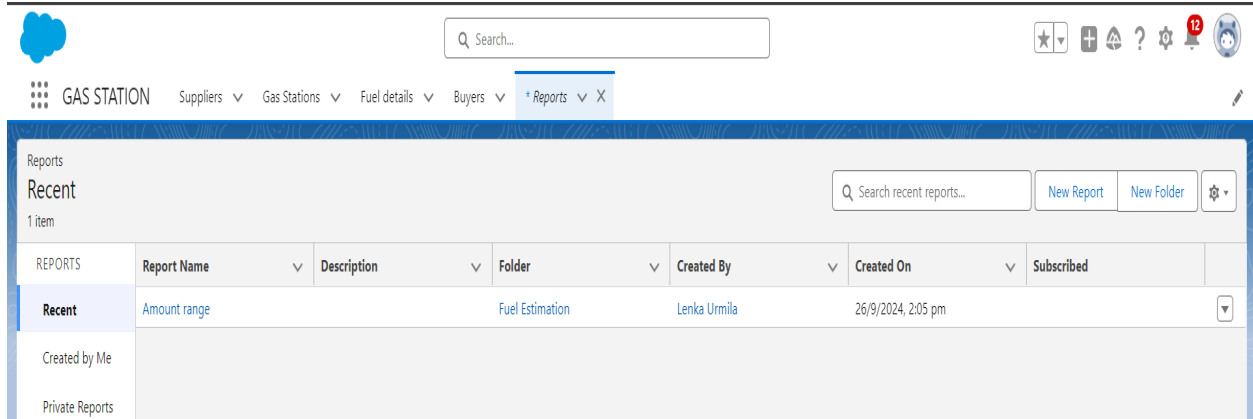
To create a record in junction object follow these steps

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

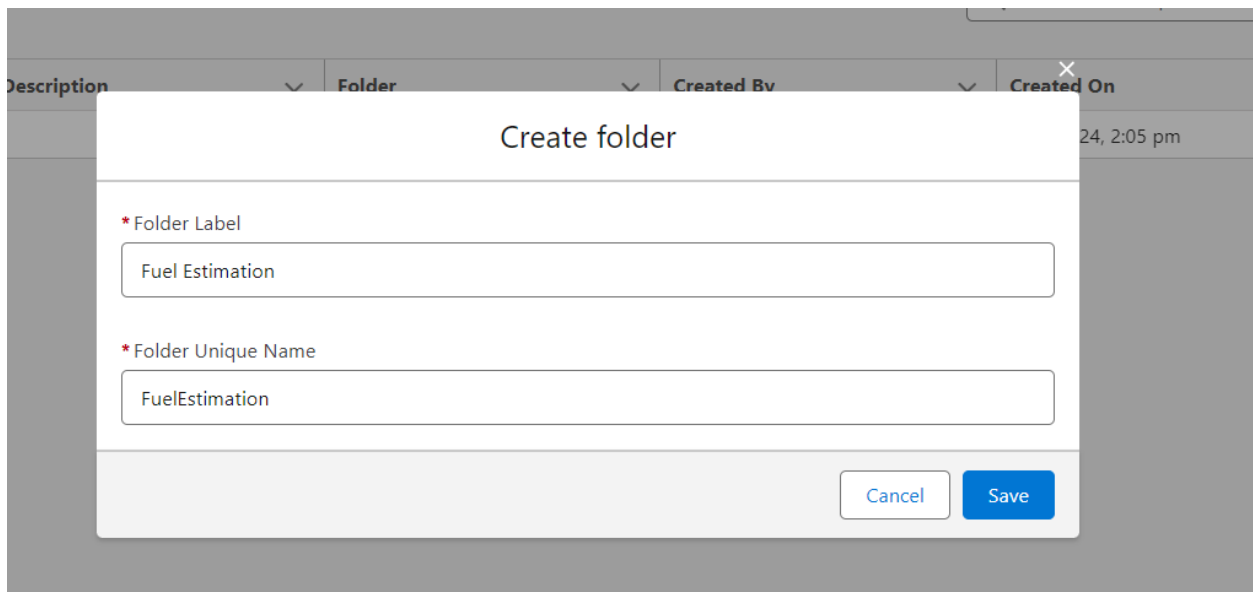
13.Reports

create a report folder

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



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



5. Click save.

2.Sharing a report folder

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

Reports

All Folders

8 items

Q Search all folders...

New Report

New Folder

REPORTS	Name	Created By	Created On	Last Modified By	Last Modified Date	
Recent	Einstein Bot Reports	Automated Process	24/9/2024, 1:07 pm	Automated Process	24/9/2024, 1:07 pm	
Created by Me	Einstein Bot Reports Spring '23	Automated Process	24/9/2024, 1:07 pm	Automated Process	24/9/2024, 1:07 pm	
Private Reports	Einstein Bot Reports Summer '23	Automated Process	24/9/2024, 1:07 pm	Automated Process	24/9/2024, 1:07 pm	
Public Reports	Einstein Bot Reports Summer '22	Automated Process	24/9/2024, 1:07 pm	Automated Process	24/9/2024, 1:07 pm	
All Reports	Einstein Bot Reports Winter '23	Automated Process	24/9/2024, 1:07 pm	Automated Process	24/9/2024, 1:07 pm	
FOLDERS	Enablement Dashboard Reports Spring '24	Automated Process	24/9/2024, 1:07 pm	Automated Process	24/9/2024, 1:07 pm	
All Folders	Enablement Dashboard Reports Summer '24	Automated Process	24/9/2024, 1:07 pm	Automated Process	24/9/2024, 1:07 pm	
Created by Me	Fuel Estimation	Lenka Urmila	26/9/2024, 1:56 pm	Lenka Urmila	26/9/2024, 1:56 pm	
Shared with Me						
FAVORITES						

Favorite

Share

Rename

Delete

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

Who Can Access

Lenka Urmila

Users

Manage

Manager

Roles

View

Done

3.Create Report

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

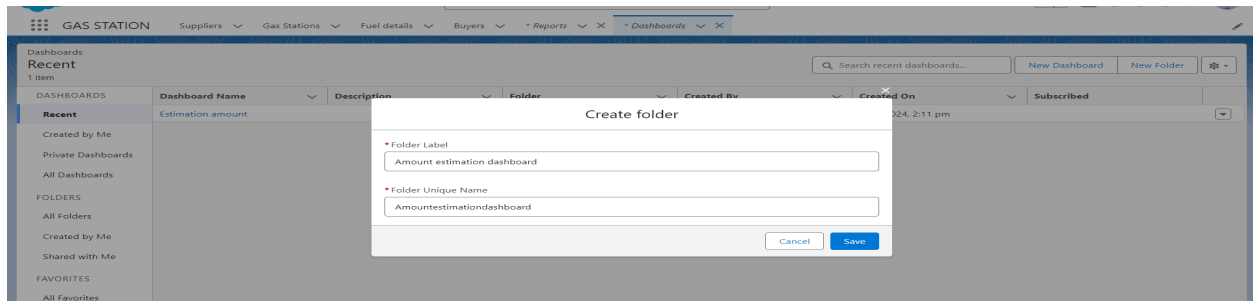
Try to fill every field in each record for better experience.

1. Go to the app ? click on the reports tab
2. Click New Report.
3. select for report type, search for “Gas station with buyers” click on it. And click on start report.
4. Their outline pane is opened already, select the fields that mentioned below in column section.
 1. Fuel filled in vehicle
 2. Amount paid
5. Remove the unnecessary fields.
6. Select the fields that mentioned below in GROUP ROWS section.
 1. Fuel Available in bunk
 2. Customer name
7. Click on conditional formatting located at the bottom of the preview pane.
8. Click on add conditional formatting rule.
9. Change the apply conditional formatting to “ sum of Amount paid ”.
10. Mention the range form “ 1000 to 5000 ”.
11. Dont change the colours, and click on Done.
12. Click apply.
13. Click save, give the report name as “Amount range”, report unique name will be auto populated.
14. Click on select folder, select “ Fuel estimation” , click select folder
15. Click save.
16. Click save & run , then the preview will be shown below.

14.Dashboards

1.Create Dashboard Folder

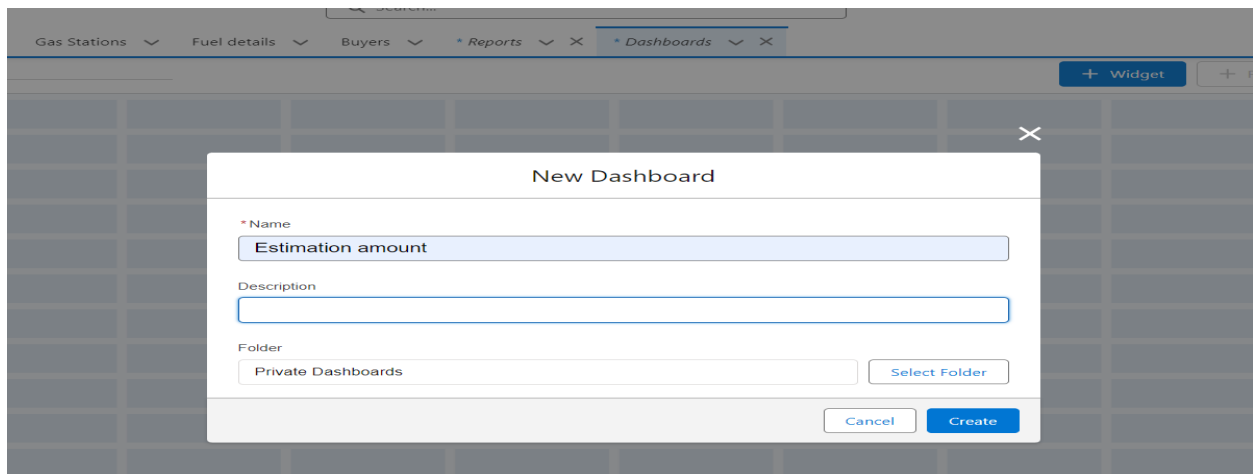
1. Click on the app launcher and search for dashboard.
2. Click on dashboard tab.
3. Click new folder, give the folder label as “ Amount estimation dashboard”.
4. Folder unique name will be auto populated.
5. Click save



Follow the same steps, and provide the sharing settings for the folder that just created.

2.Create Dashboard

1. Go to the app ? click on the Dashboards tabs.
2. Give a Name and select the folder that created, and click on create.



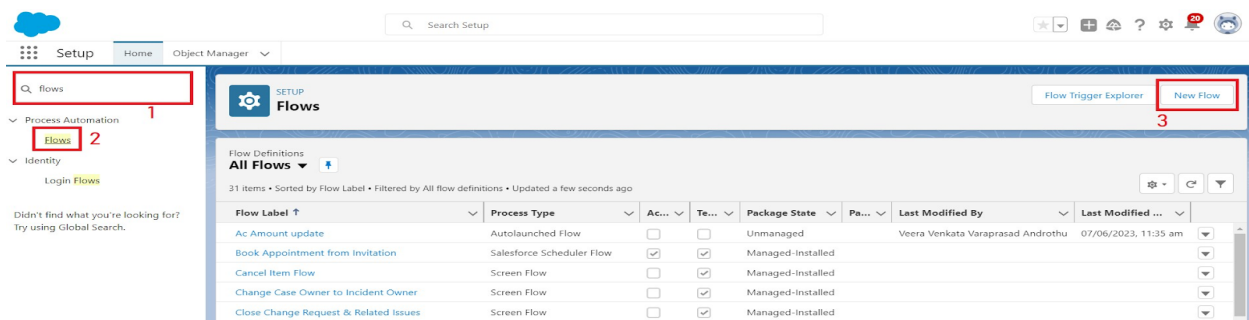
3. Select add component.
4. Select a Report and click on select.
5. Click Add then click on Save and then click on Done.
6. Preview is shown below.

15.Flows

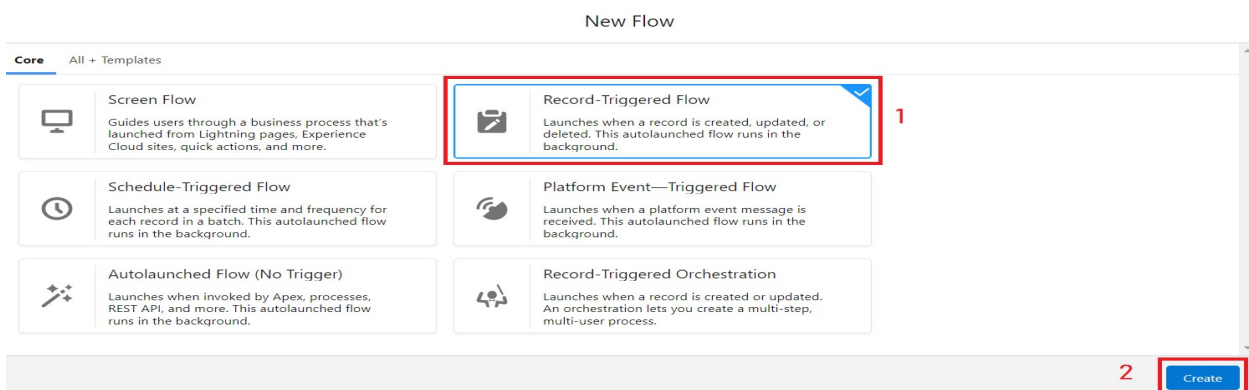
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Create a Flow

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



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



3. Select the Object as a "buyer" in the Drop down list.
4. Select the Trigger Flow when: "A record is Created or Updated".
5. Select the Optimize the flow for: "Actions and Related Records".
6. Now change the mode form Auto-layout to free-form.
7. Now select the manger option in toolbox, click New resource.
8. Select the resource type as text template.
9. Enter the API name as "emailbody".

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

Hello {!\$Record.Customer_name__c},

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

RECEPIT DETAILS :

Customer name : {!\$Record.Customer_name__c}

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

Vehicle type : {!\$Record.Vehicle_type__c}

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

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

12. Click done.

13. Now click on elements, and drag the action element into the preview pane.

14. Their action bar will be opened in that search for " send email " and click on it.

15. Give the label name as " notice"

16. API name will be auto populated.

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

18. Select the text template that created

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

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

21. Click done.

