

Fuel Station CRM Project

Problem statement: Fuel stations face challenges in efficiently managing suppliers, fuel inventory, customer transactions, loyalty programs, and reporting. Manual processes or disconnected systems often result in data errors, delayed decision-making, and missed business opportunities.

The goal of this CRM project is to create a centralized Salesforce-based solution for managing all aspects of a fuel station chain: suppliers, buyers, fuel stock, gas stations, customer details, and loyalty rewards. This system should streamline operations, improve customer service, and provide real-time insights into business performance.

Phase 1 – Problem Understanding & Industry Analysis

Objective: Establish a clear understanding of the industry challenges and define the scope of the CRM solution.

Requirement Gathering: A structured process involving direct discussions with administrators, suppliers, station managers, and buyers. The aim is to capture both functional and non-functional requirements, such as supplier onboarding, real-time stock management, buyer account maintenance, and loyalty program implementation. This ensures the CRM system is built around actual business needs.

Stakeholder Analysis: A detailed examination of all involved roles, including Admins (system governance), Suppliers (fuel providers), Gas Station Managers (daily operations), and Buyers (customers). Each role's expectations, challenges, and responsibilities are documented to ensure the system delivers value to every stakeholder.

Business Process Mapping: Mapping the complete workflow, starting from a fuel request raised by the station manager, moving through supplier approval and delivery, stock updates, and ending with customer transactions and reporting. This end-to-end visualization highlights inefficiencies and forms the basis for automation and system design.

Industry-Specific Use Cases: Identifying specialized needs of the oil and gas industry such as regulatory compliance, precise fuel supply monitoring, and supplier automation. These cases guide the customization of the CRM to handle industry challenges effectively.

AppExchange Exploration: Analyzing Salesforce's AppExchange marketplace to evaluate existing Oil & Gas solutions. Although these provide useful insights, a custom solution is chosen to meet the unique operational needs of fuel stations more effectively.

❖ **Outcome:** Clear understanding of project goals, requirements, and industry context to guide CRM design.

Phase 2 – Org Setup & Configuration

Objective: Prepare the Salesforce environment for fuel station CRM implementation.

Salesforce Edition: Selecting Sales Cloud Developer Edition to provide flexibility for customization, testing, and scalability. This edition serves as a robust foundation for building, experimenting, and deploying CRM functionalities.

Company Profile: Setting up company details, including regional settings, working hours, and official holidays. This ensures system processes like reporting and scheduling align with organizational operations.

User Setup: Creating user accounts for Admins, Suppliers, Gas Station Managers, and Buyers. Each account is configured with permissions suited to the role, ensuring secure and efficient task execution.

Roles & Profiles: Establishing a structured hierarchy where Admins have complete oversight, Suppliers manage deliveries, Station Managers oversee daily activities, and buyers access loyalty and purchase features. This structure ensures accountability and clarity.

Security: Configuring Organization-Wide Defaults (OWD), Sharing Rules, and Login Hours. These measures protect sensitive data and ensure that access is role-appropriate and compliant with security standards.

SETUP > OBJECT MANAGER

Supplier

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

Details

Description

API Name
Supplier_c
Custom
✓
Singular Label
Supplier
Plural Label
suppliers

Enable Reports
✓
Track Activities
✓
Track Field History
✓
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

Edit **Delete**

SETUP > OBJECT MANAGER

Buyer

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

Details

Description

API Name
Buyer_c
Custom
✓
Singular Label
Buyer
Plural Label
Buyers

Enable Reports
✓
Track Activities
✓
Track Field History
✓
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

Edit **Delete**

SETUP > OBJECT MANAGER

Gas station

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

Details

Description

API Name
Gas_station_c
Custom
✓
Singular Label
Gas station
Plural Label
Gas stations

Enable Reports
✓
Track Activities
✓
Track Field History
✓
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

Edit **Delete**

Fields & Relationships					
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Created By	CreatedById	Lookup(User)			
Fuel available in bunk	Fuel_available_in_bunk__c	Formula (Number)			
Fuel price/litre	Fuel_price_litre__c	Number(18, 0)			
Fuel supplied to bunk	Fuel_supplied_to_bunk__c	Roll-Up Summary (COUNT Fuel detail)			
Fuel used	Fuel_used__c	Roll-Up Summary (COUNT Fuel detail)			
Gas station Name	Name	Text(80)		✓	
Last Modified By	LastModifiedById	Lookup(User)			
Owner	OwnerId	Lookup(User,Group)		✓	

Sharing Settings			
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	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public: Read/Write	Public: Read/Write	✓
Individual	Public: Read/Write	Private	✓
Voice Call	Private	Private	✓
Activation Target	Private	Private	✓
Activation Target Internal Organization Access	Private	Private	✓

SEARCH SETUP

Setup | Home | Object Manager ▾

ETUP > OBJECT MANAGER
Fuel detail

Details

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

Details

Description
API Name: Fuel_detail_c
Custom: ✓
Singular Label: Fuel detail
Plural Label: Fuel details

Edit | Delete

Enable Reports: ✓
Track Activities
Track Field History: ✓
Deployment Status: Deployed
Help Settings: Standard salesforce.com Help Window

Search Setup

Setup | Home | Object Manager

SETUP > OBJECT MANAGER

Fuel detail

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Quick Find

New Deleted Fields Field Dependencies

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIE...
Created By	CreatedBy	Lookup(User)	
Fuel detail Name	Name	Text(80)	
Fuel supplied	Fuel_supplied_c	Number(18, 0)	
Gas station	Gas_station_c	Master-Detail(Gas station)	
Last Modified By	LastModifiedBy	Lookup(User)	
Supplier name	Supplier_name_c_c	Master-Detail(Supplier)	

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

Header: The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and various global navigation icons.

Left Sidebar: A sidebar titled "Company Settings" contains the following sections:

- Business Hours
- Calendar Settings
 - Public Calendars and Resources
- Company Information** (selected)
- Data Protection and Privacy
- Fiscal Year
- Holidays
- Language Settings
- My Domain

A message at the bottom of the sidebar says: "Didn't find what you're looking for? Try using Global Search."

Central Content Area: The main content area is titled "Company Information" and "Fuel Station". It displays the organization's profile with the following details:

Organization Detail		Edit	
Organization Name	Fuel Station	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division	India	Default Locale	English (India)
Fiscal Year Starts In	January	Default Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	376 KB (7%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) [View]
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgK00000BBvUT
		Organization Edition	Developer Edition

Page Header: The top right of the content area has a "Help for this Page" link with a question mark icon.

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

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Top Navigation:** Shows "Setup" as the active tab, along with "Home" and "Object Manager".
- Left Sidebar:** A navigation tree under "Users" with the following branches:
 - Roles** (selected)
 - Feature Settings**
 - Sales**
 - Contact Roles on Contracts
 - Contact Roles on Opportunities
 - Service**
 - Case Teams**
 - Case Team Roles
 - Contact Roles on Cases
- Middle Content:** The main area is titled "Creating the Role Hierarchy". It displays "Your Organization's Role Hierarchy" with a tree view.
 - Fuel Station**
 - bunks** (Edit | Del | Assign)
 - Add Role
 - Buyer** (Edit | Del | Assign)
 - Add Role
 - CEO** (Edit | Del | Assign)
 - Add Role
 - Fuel_Type_c** (Edit | Del | Assign)
 - Add Role
 - Fuel_managers** (Edit | Del | Assign)
 - Add Role
 - total income** (Edit | Del | Assign)
 - Add Role
- Help and Buttons:** Includes a "Help for this Page" link and a "Show in tree view" dropdown.

The screenshot shows the Salesforce Sharing Settings page in the Setup menu. The left sidebar has a search bar and navigation links for Setup, Home, and Object Manager. A search result for 'sharing' is shown under the 'Sharing' category. The main content area is titled 'Sharing Settings' and contains a table of sharing rules. Below the table are sections for 'Other Settings' and 'Lead Sharing Rules'.

Work Type	Private	Private	<input checked="" type="checkbox"/>
Work Type Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
Appointment	Public Read/Write	Private	<input checked="" type="checkbox"/>
Billing	Public Read/Write	Public Read Only	<input checked="" type="checkbox"/>
Buyer	Public Read/Write	Public Read Only	<input checked="" type="checkbox"/>
Fuel detail	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Gas station	Public Read/Write	Public Read Only	<input checked="" type="checkbox"/>
Medical Record	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Patient	Public Read/Write	Private	<input checked="" type="checkbox"/>
Supplier	Public Read/Write	Public Read Only	<input checked="" type="checkbox"/>

Other Settings

- Manager Groups: [i](#)
- Secure guest user record access: [i](#)
- Require permission to view record names in lookup fields: [i](#)

Lead Sharing Rules

✓Outcome: Outcome: A secure, well-configured Salesforce org ready for customization.

Phase 3 – Data Modeling & Relationships

Objective: Build a scalable CRM data structure for suppliers, stations, buyers, and transactions.

- **Custom Objects:** Gas Station, Supplier, Buyer, Fuel Details, Transactions.
- **Relationships:** Supplier → Fuel Details (Master-Detail), Gas Station → Fuel Details (Lookup), Buyer → Transactions (Lookup).
- **Fields:** Fuel Type, Quantity, Price, Date Supplied; Transactions → Amount, Buyer, Fuel Type, Purchase Date.
- **Layouts & Record Types:** Configure layouts for Gas Station and Buyer for better usability.

- **Schema Builder:** Relationships for various data
- **Junction objects:** Had multiple data suppliers
- **Compact layouts:** status, fuel details we added compact layouts

SEARCH SETUP

Setup Home Object Manager

SETUP > OBJECT MANAGER

Fuel detail

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Restriction Rules Scoping Rules Object Access Triggers

Quick Find New Deleted Fields Field Dependencies Set Hist

Created By	CreatedById	Lookup(User)
Field name	Field_name_c	Text(2)
Fuel detail name	Fuel_detail_name_c	Text(2)
Fuel detail Name	Name	Text(80) ✓
Fuel price/litre	Fuel_price_litre_c	Text(2)
Fuel supplied	Fuel_supplied_c	Number(18, 0)
Gas station	Gas_station_c	Master-Detail(Gas station) ✓
Last Modified By	LastModifiedById	Lookup(User)
Supplier name	Supplier_name_c_c	Master-Detail(Supplier) ✓

Setup Home Object Manager

SETUP > OBJECT MANAGER
Buyer

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Restriction Rules Scoping Rules Object Access Triggers

Quick Find New Deleted Fields Field Dependencies Set Hist 12 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIE...
Amount paid	Amount_paid_c	Formula (Text)	
Buyer Name	Name	Text(80)	
Created By	CreatedById	Lookup(User)	
Customer name	Customer_name_c	Formula (Text)	
Email	Email_c	Email	
First name	First_name_c	Text(2)	
Fuel filled in vechicle	Fuel_filled_in_vehcile_c	Number(18, 0)	
Last Modified By	LastModifiedById	Lookup(User)	
Last name	Last_name_c	Text(2)	

Setup Home Object Manager

SETUP > OBJECT MANAGER
Buyer

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Restriction Rules Scoping Rules Object Access Triggers

Quick Find New Deleted Fields Field Dependencies Set Hist 12 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIE...
Amount paid	Amount_paid_c	Formula (Text)	
Buyer Name	Name	Text(80)	
Created By	CreatedById	Lookup(User)	
Customer name	Customer_name_c	Formula (Text)	
Email	Email_c	Email	
First name	First_name_c	Text(2)	
Fuel filled in vechicle	Fuel_filled_in_vehcile_c	Number(18, 0)	
Last Modified By	LastModifiedById	Lookup(User)	
Last name	Last_name_c	Text(2)	

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Gas station

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Quick Find 8 items, sorted by Field Label

New Deleted Fields Field Dependencies Set History

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FILED
Created By	CreatedById	Lookup(User)	
Fuel available in bunk	Fuel_available_in_bunk_c	Formula (Number)	
Fuel price/litre	Fuel_price_litre_c	Number(18, 0)	
Fuel supplied to bunk	Fuel_supplied_to_bunk_c	Roll-Up Summary (COUNT Fuel detail)	
Fuel used	Fuel_used_c	Roll-Up Summary (COUNT Fuel detail)	
Gas station Name	Name	Text(80)	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Gas station

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Quick Find 8 items, sorted by Field Label

New Deleted Fields Field Dependencies Set History

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FILED
Created By	CreatedById	Lookup(User)	
Fuel available in bunk	Fuel_available_in_bunk_c	Formula (Number)	
Fuel price/litre	Fuel_price_litre_c	Number(18, 0)	
Fuel supplied to bunk	Fuel_supplied_to_bunk_c	Roll-Up Summary (COUNT Fuel detail)	
Fuel used	Fuel_used_c	Roll-Up Summary (COUNT Fuel detail)	
Gas station Name	Name	Text(80)	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Supplier

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

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Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Quick Find New Deleted Fields Field Dependencies Set History

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FILED	INTEGRATION
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Sun of fuel supplied	Sun_of_fuel_supplied__c	Roll-Up Summary (COUNT Fuel detail)		
Supplier Name	Name	Text(80)		✓

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Supplier

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

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Scoping Rules

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Quick Find New Deleted Fields Field Dependencies Set History

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FILED	INTEGRATION
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Sun of fuel supplied	Sun_of_fuel_supplied__c	Roll-Up Summary (COUNT Fuel detail)		
Supplier Name	Name	Text(80)		✓

SETUP > OBJECT MANAGER

Supplier

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

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

Fields

Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists

Quick Find Field Name	
Section	Owner
Blank Space	Sun of fuel supplied
Created By	Supplier Name
Last Modified By	

System Information (Header visible on edit only)

Created By Sample Text

Last Modified By Sample Text

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only)

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

Related Lists

Fuel details	New	Change Owner
Fuel detail: Fuel detail Name		
Sample Text		

SETUP > OBJECT MANAGER

Supplier

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

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

Fields

Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists

Quick Find Field Name	
Section	Owner
Blank Space	Sun of fuel supplied
Created By	Supplier Name
Last Modified By	

System Information (Header visible on edit only)

Created By Sample Text

Last Modified By Sample Text

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only)

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

Related Lists

Fuel details New Change Owner

Fuel detail: Fuel detail Name

Sample Text

SETUP > OBJECT MANAGER

Buyer

Details

Fields & Relationships

Page Layouts

- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

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

Fields

Section	Created By	Fuel filled in v...
Blank Space	Customer name	Last Modified By
Amount paid	Email	Last name
Buyer Name	First name	Owner

Quick Find Field Name

Information (Header visible on edit only)

Buyer Name	Sample Text	Owner	Sample Text
First name	Sample Text		
Last name	Sample Text		
Customer name	Sample Text		
phone number	1-415-555-1212		
Email	sarah.sample@company.com		
Fuel filled in vechicle	713		
Vechicles	Sample Text		
Amount paid	Sample Text		

System Information (Header visible on edit only)

Created By	Sample Text	Last Modified By	Sample Text
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Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only)

SETUP > OBJECT MANAGER

Buyer

Details

Fields & Relationships

Page Layouts

- Lightning Record Pages
- Buttons, Links, and Actions
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- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

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

Fields

Section	Created By	Fuel filled in v...
Blank Space	Customer name	Last Modified By
Amount paid	Email	Last name
Buyer Name	First name	Owner

Quick Find Field Name

Information (Header visible on edit only)

Buyer Name	Sample Text	Owner	Sample Text
First name	Sample Text		
Last name	Sample Text		
Customer name	Sample Text		
phone number	1-415-555-1212		
Email	sarah.sample@company.com		
Fuel filled in vechicle	713		
Vechicles	Sample Text		
Amount paid	Sample Text		

System Information (Header visible on edit only)

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

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only)

 Gas station suppliers ▾ Gas stations ▾ Buyers ▾ Fuel details ▾ Duplicate

 Gas station
petrol bunl

New Contact

Edit

Related

Details

Gas station Name

petrol bunl

Owner

 Miniki Mahalaxmi 

Fuel supplied to bunk

1

Fuel price/litre

10,000,000

Fuel used

1

Fuel available in bunk

9,999,999.00

Created By

 Miniki Mahalaxmi,

9/23/2025, 3:29 AM

Last Modified By

 Miniki Mahalaxmi,

9/23/2025, 3:29 AM

SETUP > OBJECT MANAGER

Fuel detail

Fuel detail Compact Layout
Fuel price/litre

« Back to Fuel detail

Compact Layout Detail	
Label	Fuel price/litre
API Name	Fuel_price_litre
Included Fields	Fuel detail name
Created By	Miniki Mahalaxmi, 9/25/2025, 8:28 PM
Modified By	Miniki Mahalaxmi, 9/25/2025, 8:28 PM

[Edit](#) [Clone](#) [Delete](#) [Compact Layout Assignment](#)

Help for this Page ?

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts**
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
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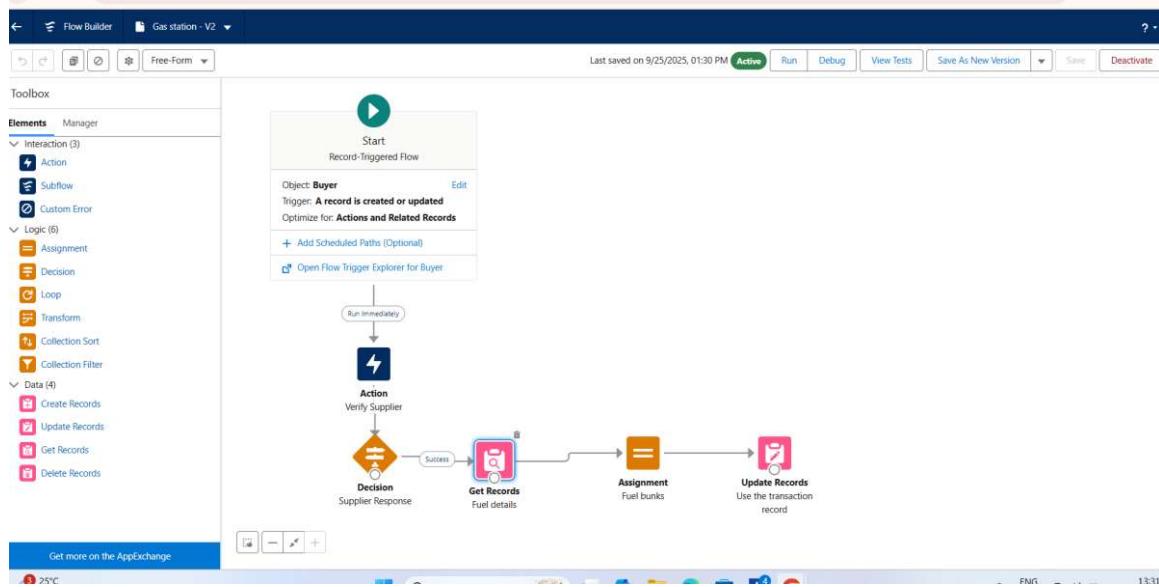
✓Outcome: Outcome: A robust Salesforce data model enabling accurate fuel station operations tracking.

Phase 4 – Process Automation (Admin)

Objective: Automate critical business workflows to improve efficiency.

- **Validation Rules:** Ensure Amount > 0, Fuel Quantity > 0.
- **Approval Processes:** Automate high-value supplier contract approvals.
- **Flows:** Automatically update stock after transactions.

- **Email Alerts:** Notify managers for low stock or pending approvals.
- **Reminders:** Send notifications for supplier reorders.
- **Custom notification:** Set up notification for agent to update fuel details.
- **Field updates:** After approval Fuel manager = "confirmed"
- **Workflow rules:** Auto-send email when buyer send bulk amount
- **Workflow rules:** Replaced by flow now



Setup Home Object Manager

Search: exter

Email
Send through External Email Services

Apps
External Client Apps
External Client App Manager
OAuth Usage
Settings

Integrations
External Data Sources
External Objects
External Services

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

SETUP
External Data Sources

External Data Source: FuelPricingAPI Help for this Page ?

Connect to another Salesforce org or a third-party database or content system.
[« Back to External Data Sources](#)

Edit **Validate and Sync** **Delete**

External Data Source	FuelPricingAPI
Name	FuelPricingAPI
Type	Salesforce Connect: OData 2.0

Parameters

URL	https://fuelpricing.gov/api
Connection Timeout (Seconds)	120
Writable External Objects	<input type="checkbox"/>
High Data Volume	<input type="checkbox"/>
Server	<input type="checkbox"/>

Search Setup

Setup Home Object Manager

SETUP
Object Manager

Fuel detail Validation Rule

Help for this Page ?

[Back to Fuel detail](#)

Validation Rule Detail		Edit	Clone
Rule Name	Fuel_supplied_today	Active	<input checked="" type="checkbox"/>
Error Condition Formula	Fuel_supplied__c >Fuel_supplied__c	Error Location	Top of Page
Error Message	Delivery date must be in the future for proper planning.		
Description			
Created By	Miniki Mahalaxmi , 9/22/2025, 11:54 PM	Modified By	Miniki Mahalaxmi , 9/22/2025, 11:54 PM
		Edit	Clone

Search Setup

Setup Home Object Manager

workflow rule

Process Automation Workflow Rules

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

SETUP Workflow Rules

Edit Rule Fuel_Type__c Help for this Page

Step 3: Specify Workflow Actions Step 3 of 3

Done

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria Fuel_supplied__c > Fuel_supplied__c
Evaluation Criteria Evaluate the rule when a record is created

Immediate Workflow Actions

No workflow actions have been added.
Add Actions

Time-Dependent Workflow Actions [See an example](#)

Info No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

Search Setup

Setup Home Object Manager

workflow rule

Process Automation Workflow Rules

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

SETUP Workflow Rules

Workflow Rule Fuel_Type__c Help for this Page ?

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Workflow Rule Detail Edit Clone Deactivate

Rule Name	Fuel_Type__c	Object	Fuel detail
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created
Description			
Rule Criteria	Fuel_supplied__c > Fuel_supplied__c		
Created By	Miniki Mahalaxmi, 9/22/2025, 11:57 PM	Modified By	Miniki Mahalaxmi, 9/22/2025, 11:57 PM

Workflow Actions Edit

Immediate Workflow Actions

No workflow actions have been added.

8 28°C

The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. A search bar at the top right contains the text 'Search Setup'. Below the navigation, there's a sidebar with a search field containing 'workflow rule' and a list of categories: 'Process Automation' and 'Workflow Rules', where 'Workflow Rules' is highlighted. A message below the sidebar says ' Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'SETUP Workflow Rules' and shows a 'Workflow Rule' named 'Fuel_Type__c'. A callout box provides information about migrating to Flow Builder. The 'Workflow Rule Detail' section shows the rule is active, evaluates when a record is created, and has a specific rule criteria. The 'Workflow Actions' and 'Immediate Workflow Actions' sections are empty. At the bottom left, there's a weather widget showing '8 28°C'.

Search Setup

Setup Home Object Manager

Search bar: approv

Approval Processes

SETUP

1. [View the checklist](#)
2. [View the checklist](#)
3. [Create a custom user hierarchical relationship field](#)
4. [Create email templates](#)
5. Create an approval process using either the Jump Start or Standard Wizard
6. Add Approval History Related List to all page layouts
7. Activate the process to deploy to your users

Manage Approval Processes For: Fuel detail

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

Create New Approval Process

Active Approval Processes Reorder

No approval processes available

Inactive Approval Processes

Action	Approval Process Name	Description
Edit Del	Fuel manager	

Search Setup

Setup Home Object Manager

email alerts

Process Automation

Workflow Actions

Email Alerts

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

SETUP Email Alerts

Email Alert
"Your fuel order for {Quantity__c} liters of {Fuel_Type__c} is approved."

Help for this Page

Rules Using This Email Alert [0] | Approval Processes Using This Email Alert [0] | Entitlement Processes Using This Email Alert [0]

Email Alert Detail

Description: "Your fuel order for {Quantity__c} liters of {Fuel_Type__c} is approved." Edit Delete Clone

Unique Name: Your_fuel_order_for_Quantity_c_liters_of_Fuel_Type_c_is_approved

From Email Address: Current User's email address

Recipients: Role: Marketing Team
Role: Fuel manager
User: Security User

Additional Emails

Created By: Miniki Mahalaxmi, 9/23/2025, 12:06 AM

Edit Delete Clone

Search Setup

Setup Home Object Manager

notification builder

Notification Builder

Custom Notifications

Notification Delivery Settings

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

SETUP

Custom Notifications

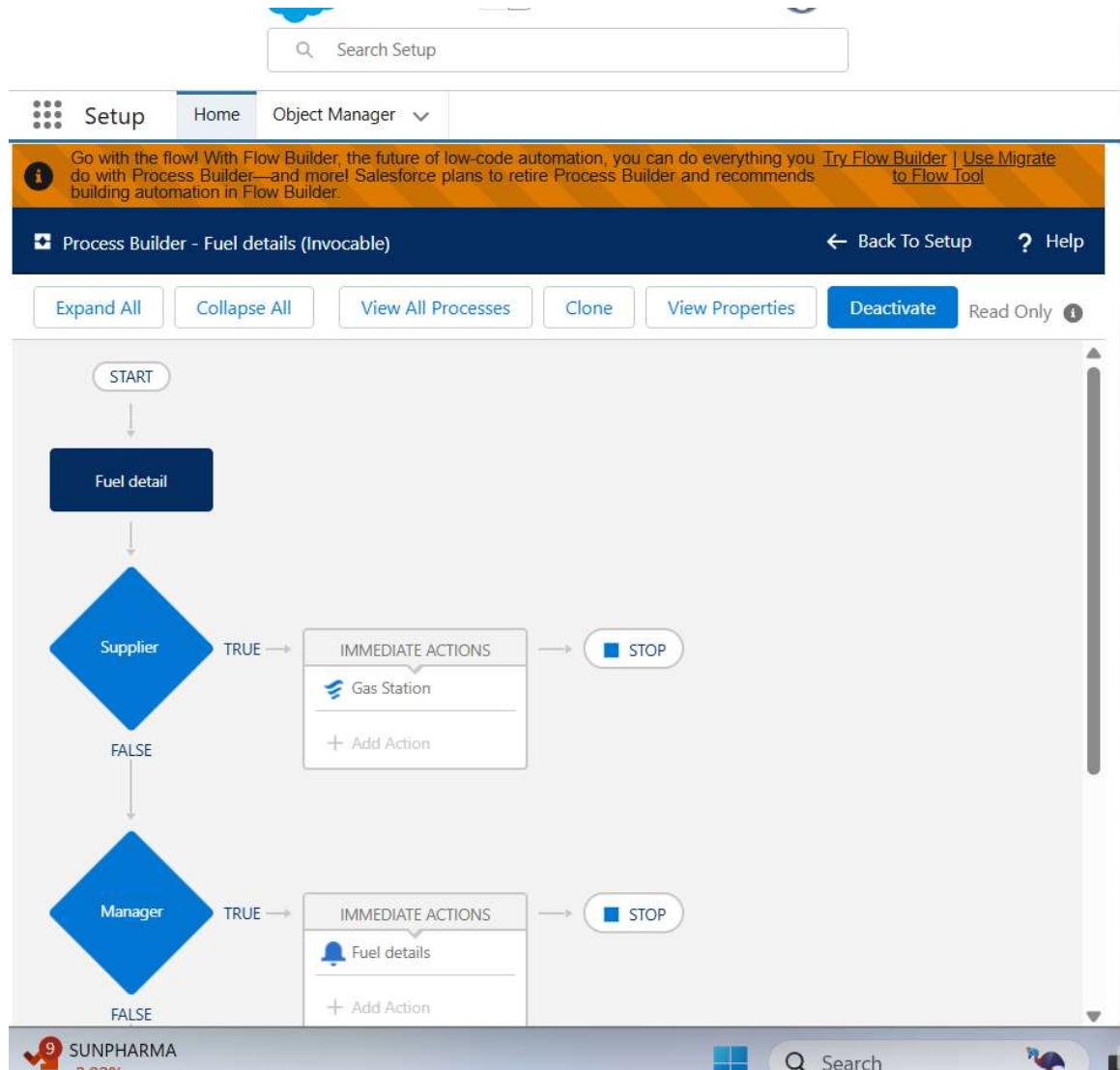
i When you create and use custom notifications, the title and body of the custom push notification may be saved to and processed by Google, Microsoft and/or Apple. Salesforce is not responsible for the privacy and security practices of third-party systems or applications like Google Cloud Messaging or Apple Push Notification Service.

Custom Notification Types

New

Send custom notifications using [Flows](#) or [Process Builder](#)

NOTIFICATION NAME	API NAME
enablement_coaching_feedback_ready	enablement_coaching_feedback_rea
Fuel order approved	Fuel_order_approved
Storage tanks	Storage_tanks



❖ Outcome: Reduced manual work with automated and reliable business processes.

Phase 5 – Apex Programming (Developer)

Objective: Implement advanced business logic with Salesforce Apex.

- **Triggers:** Prevent duplicate fuel supply entries.

```

trigger DeliveryTrigger on Delivery_c (before insert, before update) {
    DeliveryHandler.beforeSave(Trigger.new, Trigger.oldMap);
}

public class DeliveryHandler {
    public static void beforeSave(List<Delivery_c> newList, Map<Id, Delivery_c> oldMap) {
        // custom validation logic here
    }
}

```

- **SOQL:** Retrieve fuel stock and transaction details efficiently.

```

List<Delivery_c> deliveries = [SELECT Id, Delivery_Status_c FROM Delivery_c WHERE
Delivery_Status_c = 'Pending'];
SOSL – Search Across Customers and OrdersList<List<SObject>> results =
[FIND 'Kavya*' IN ALL FIELDS
RETURNING Customer_c(Id, Name), Order_c(Id, Status_c)];

```

- **Batch Apex:** Run nightly batch jobs for sales and fuel stock updates.

```

global class UpdateDeliveryBatch implements Database.Batchable<SObject> {
    global Database.QueryLocator start(Database.BatchableContext bc) {
        return Database.getQueryLocator('SELECT Id, Delivery_Status_c FROM Delivery_c');
    }
    global void execute(Database.BatchableContext bc, List<Delivery_c> scope) {
        for (Delivery_c d : scope) {
            d.Delivery_Status_c = 'Archived';
        }
        update scope;
    }
    global void finish(Database.BatchableContext bc) {}
}

```

- **Future Methods:** Enable asynchronous calls for supplier APIs.

- **Test Classes:** Ensure code reliability and maintain test coverage.

```

@isTest
private class DeliveryTriggerTest {
    @isTest static void testDuplicateDeliveryNumber() {
        // insert deliveries and check addError
    }
}

```

- **Apex Triggers:** prevent overlapping bookings for the same Fuel.

```

trigger DeliveryTrigger on Delivery__c (before insert, before update) {
    for (Delivery__c d : Trigger.new) {
        Boolean exists = [
            SELECT Id FROM Delivery__c
            WHERE Delivery_Number__c = :d.Delivery_Number__c
            AND Id != :d.Id
            LIMIT 1
        ] != null;
        if(exists) {
            d.addError('This Delivery Number already exists.');
        }
    }
}

```

- **Classes & Objects:** Create a BookingService class for reusable logic.

```

public class DeliveryService {
    public static void confirmDelivery(Id deliveryId) {
        Delivery__c d = [SELECT Id, Delivery_Status__c FROM Delivery__c WHERE Id =
        :deliveryId];
        d.Delivery_Status__c = 'Confirmed';
        update d;
    }
}

```

- **Collections:** Store multiple vehicle IDs in Set to avoid duplicates.

```
List<String> orderIds = new List<String>();  
Set<Id> customerIds = new Set<Id>();  
Map<Id, Order__c> orderMap = new Map<Id, Order__c>([SELECT Id, Status__c FROM  
Order__c]);
```

- **Asynchronous Processing:** Batch + Queueable + Future = async jobs.

- **Future Methods:** Call external insurance API async.

```
public class PaymentGateway {  
    @future(callout=true)  
    public static void processPayment(Id paymentId) {  
        // external API call for payment processing  
    }  
}
```

Search Setup

Setup Home Object Manager

apex class

Custom Code Apex Classes

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

SETUP Apex Classes

Estimate your organization's code coverage [i](#)

Compile all classes [i](#)

View: All [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L

Developer Console [New](#) Generate from WSDL [Run](#)

Action	Name	Namespace Prefix	Api Version	Status
Edit Del Security	Appointment		64.0	Activ
Edit Del Security	FuelService		64.0	Activ
Edit Del Security	FuelStationTest		64.0	Activ
Edit Del Security	FuelTransactionTrigger		64.0	Activ
Edit Del Security	PaymentGatewayService		64.0	Activ

4 500606

Search Setup

Setup Home Object Manager

apex

SETUP Apex Classes

View: All Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | C

Action Name Namespace Prefix API Version Status Size Without C

Edit Del Security	Appointment		64.0	Active	29
Edit Del Security	FuelService		64.0	Active	29
Edit Del Security	FuelStationTest		64.0	Active	33
Edit Del Security	FuelTransactionTrigger		64.0	Active	40
Edit Del Security	InsuranceStatus		64.0	Active	33
Edit Del Security	PaymentGatewayService		64.0	Active	698
Edit Del Security	SMSService		64.0	Active	719

Did you find what you're looking for?
Try using Global Search.

Apex Exception Email
Apex Settings
Apex Test Execution
Apex Test History
Apex Triggers
Apex Classes
Apex Flex Queue
Apex Jobs

Setup Home Object Manager

apex

Email
Apex Exception Email

Custom Code
Apex Classes
Apex Settings
Apex Test Execution
Apex Test History
Apex Triggers

Environments

Jobs
Apex Flex Queue
Apex Jobs

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

SETUP Apex Classes

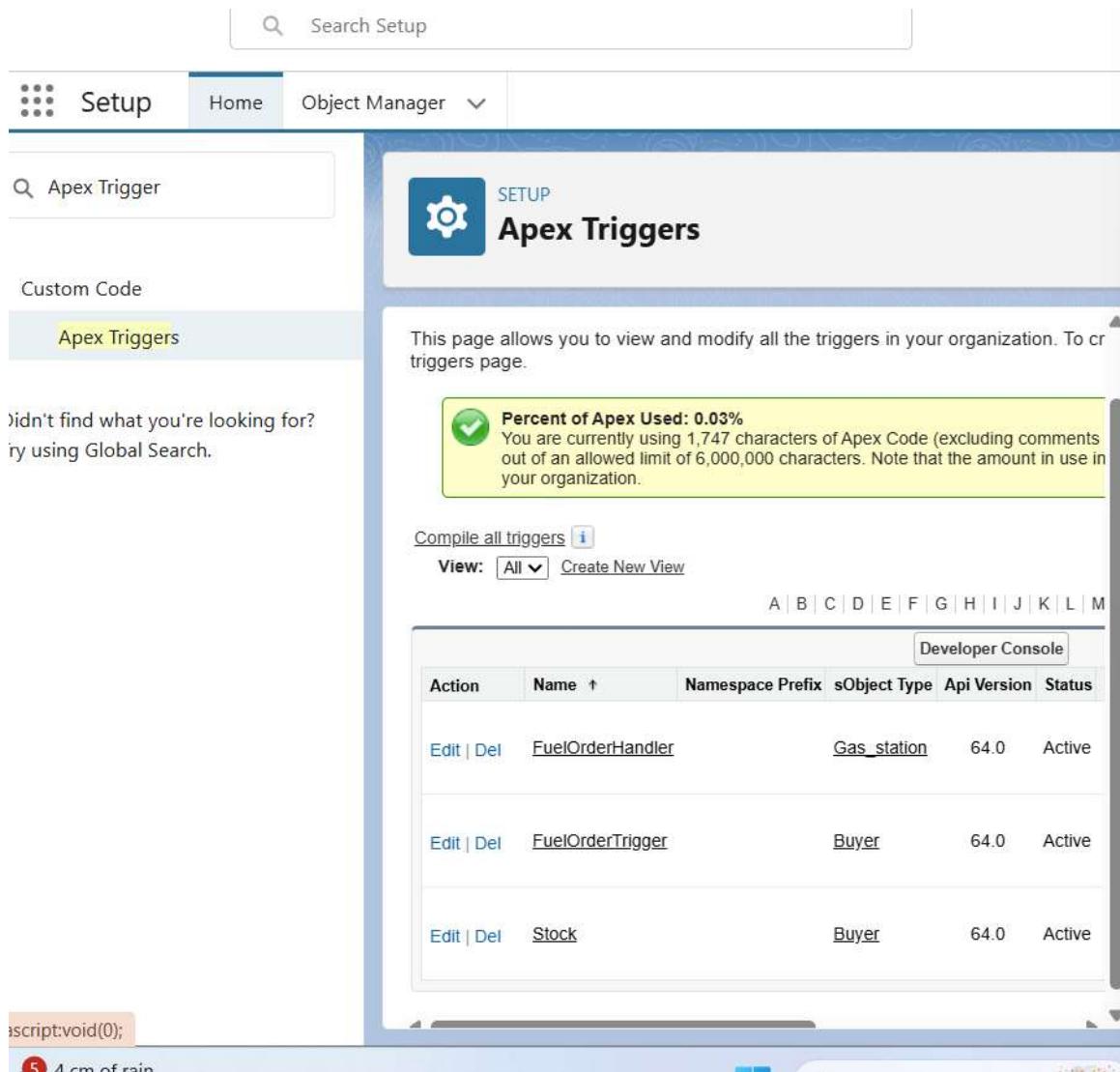
Action	Class Name	Namespace Prefix	Api Version	Created By
Open	Bunkservice	ExternalService	64.0	Miniki Mahalaxmi, 9/23/2025, 8:43 PM

Dynamic Apex Classes

Dynamic Apex extends your programming reach by interacting with Lightning Platform components.

View: All Create New View

Action	Class Name	Namespace Prefix	Api Version	Created By
Open	Bunkservice	ExternalService	64.0	Miniki Mahalaxmi, 9/23/2025, 8:43 PM



❖ Outcome: A scalable, high-performance backend with advanced business logic.

Phase 6 – User Interface Development

Objective: Deliver a user-friendly CRM experience with Lightning components.

- **Lightning App:** Create 'Fuel CRM' app with a professional interface.
- **Navigation Tabs:** Gas Station, Suppliers, Buyers, Transactions, Reports.
- **Dashboards:** Visualize Fuel Sales, Supplier Deliveries, and Buyer Loyalty.

- **Lightning Web Components (LWC):** Develop a search tool for fuel availability by station/date.
- **Record Pages:** Fuel → list of Booking types of fuel
- **Tabs:** Add Station & Bookings Fuels.
- **Events in LWC:** Child component (search form) → sends event to parent (results).
- **Utility Bar:** Quick “Fuel details” action.
- **Navigation Service:** After booking → navigate to the Booking record page.

Search... ✖

Gas station suppliers ▾ Gas stations ▾ Buyers ▾ * Dashboards ▾ X * More ▾ Edit

current stock levels by Fuel_Type__c) ✖ + Widget + Filter ↻ ⟳ ✖

Fuel_Transaction... ✖

View Report (Fuel Transaction __c))

Lightning App Builder Pages ▾ Fuel Supplied ? Help

Components Save

Recent Items: Report Chart, Rich Text, runtime_cdpdataModelTab, Scheduled Service Appointments, Tableau Pulse, Tableau View, Tabs, Visualforce.

Custom (1): Fuel Station Org

Custom - Managed (0)

Get more on the AppExchange

Fuel Info

Fuel Type: Diesel

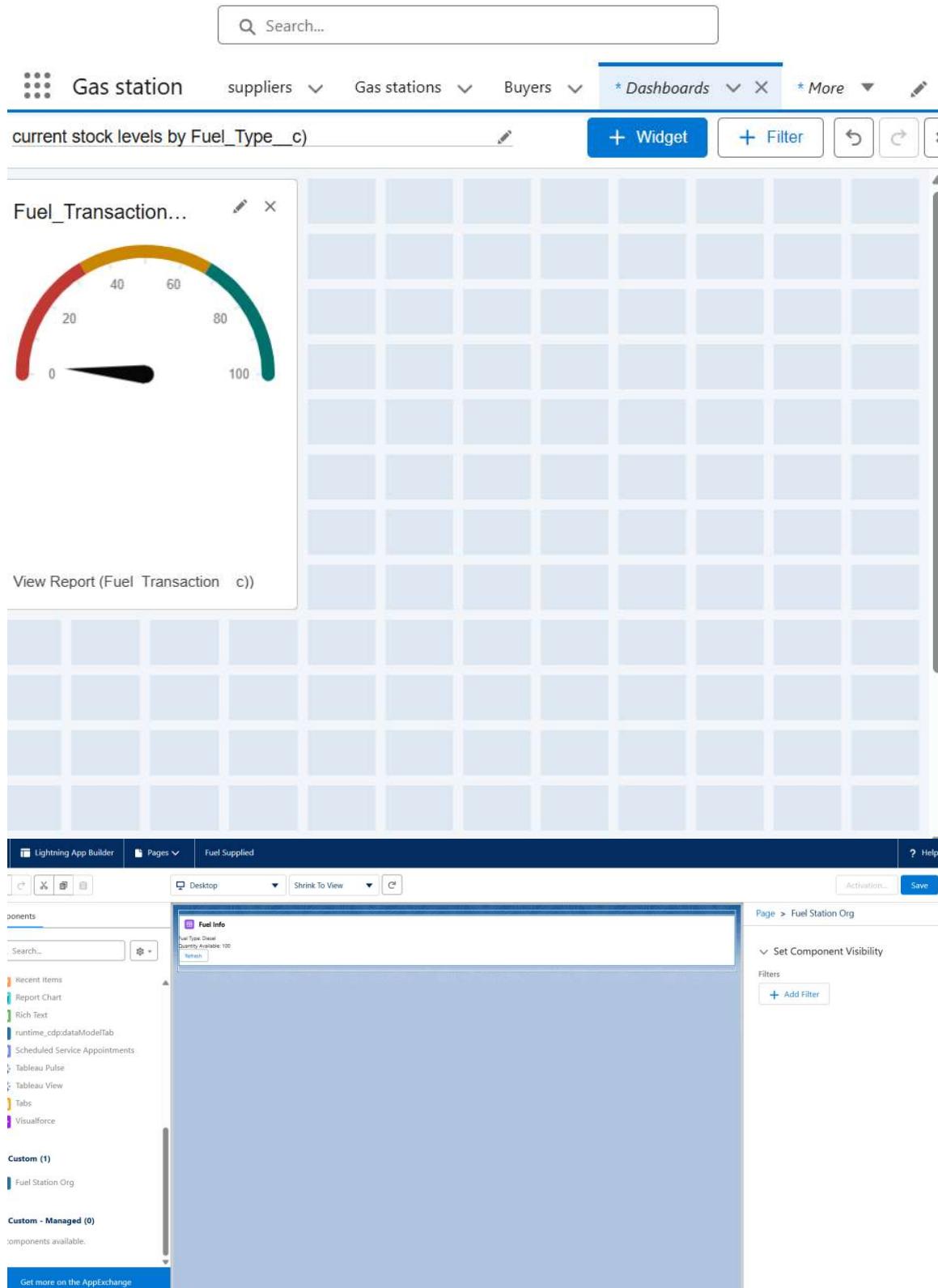
Quantity Available: 100

Refresh

Page > Fuel Station Org

Set Component Visibility

Add Filter



Pages ▾ Fuel Supplied

Activation: Fuel Supplied

PAGE SETTINGS LIGHTNING EXPERIENCE MOBILE NAVIGATION

Give this app page a name, set the page visibility, and choose an icon.

Name

Enter a name for your page.

Fuel Supplied

Icon

Choose an icon to represent your app in Lightning Experience mobile app.

 Change...

Page Activation

When you activate this page, a custom tab is created for it. You can manage the tab's visibility in Setup.

Activate for all users
 Activate for system administrators only

The screenshot shows a Visual Studio Code (VS Code) interface with the following details:

- Explorer View:** Shows the project structure under `force-app/main/default/lwc/fuel`. Files listed include `.husky`, `.sf`, `.sfdx`, `.vscode`, `config`, `force-app/main/default` (which is expanded), `applications`, `aura`, `classes`, `contentassets`, `flexipages`, `layouts`, `lwc\fuel` (which is expanded), `_tests_`, `fuel.html`, `fuel.js`, and `fuel.js-meta.xml`.
- Editor View:** The file `fuel.js-meta.xml` is open. The XML content is as follows:

```
<?xml version="1.0" encoding="UTF-8"?>
<LightningComponentBundle xml:space="preserve">
    <apiVersion>58.0</apiVersion>
    <isExposed>true</isExposed>
    <masterLabel>Fuel Station</masterLabel>
    <description>Simple Hello</description>
    <targets>
        <target>lightning_Home</target>
        <target>lightning_App</target>
    </targets>
</LightningComponentBundle>
```

- Salesforce CLI:** A sidebar panel titled "Salesforce CLI" displays the following log output:
- Created fuel
- LightningComponentBundle
- force-app\main\default\lwc\fuel\fuel.html
- Created fuel
- LightningComponentBundle
- force-app\main\default\lwc\fuel\fuel
- Bottom Status Bar:** Shows "Ln 11, Col 28" and "Spaces: 4" and "UTF-8".
- Bottom Right Panel:** A floating panel with the title "Build with agent mode." contains the following text:
- AI responses may be inaccurate.
- Generate instructions to onboard AI onto your codebase.

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Action	Label	Tab Style	Description
Edit Del	Buyers	Bank	
Edit Del	Fuel details	Alarm clock	
Edit Del	Gas stations	Camera	
Edit Del	suppliers	Bottle	

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

❖ Outcome: A modern and intuitive interface that enhances user adoption.

Phase 7 – Integration & External Access

Objective: Connect Salesforce with external systems for real-time data access.

- **Named Credentials:** Secure supplier API logins.
- **External Services:** Connect with external insurance verification.
- **REST Integration:** Fetch real-time fuel prices from external systems.
- **Platform Events:** Trigger alerts for low stock levels.
- **OAuth:** Enable secure buyer login via external portals.

- **Remote Site Settings:** Allow callouts to external domains.
- **Callouts:** Triggered when booking was created.
- **API Limits:** Monitor API calls/day.

Search Setup

Setup Home Object Manager

named

Security

Named Credentials

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

SETUP Named Credentials

Named Credentials External Credentials More ▾

1 Items · Sorted by Label New ▾

Label	Type	URL	Extern...	Actions
FuelSupplier...	Secured End...	https://supp...	Fuel Supplied	▼

https://orgfarm-6cc9db0b01-dev-ed.lightning.force.com/lightning/setup/NamedCredential/home

4 25°C

The screenshot displays the Salesforce Setup interface. At the top, there's a search bar with the placeholder "Search Setup". Below the search bar, the navigation bar includes "Setup" (which is highlighted in blue), "Home", and "Object Manager". A sidebar on the left is titled "Security" and contains a link to "Named Credentials". A message below the sidebar says, "Didn't find what you're looking for? Try using Global Search.". The main content area is titled "SETUP Named Credentials". It shows a table with one item. The table columns are "Label", "Type", "URL", "Extern...", and "Actions". The single row contains the values: "FuelSupplier...", "Secured End...", "https://supp...", "Fuel Supplied", and a dropdown arrow icon. At the bottom of the page, the URL "https://orgfarm-6cc9db0b01-dev-ed.lightning.force.com/lightning/setup/NamedCredential/home" is visible in the browser's address bar. The status bar at the bottom of the screen shows a notification with the number "4" and the temperature "25°C".

Search Setup

Setup Home Object Manager

external

SETUP External Services

Add an External Service

Email

Send through External Email Services

Apps

External Client Apps

External Client App Manager

OAuth Usage

Settings

Integrations

External Data Sources

External Objects

External Services

Total Registrations Active Operations Total Operations Active Objects Total Objects

External Service Name ↑	D	Active Operations	Total Oper.
Bunkservice		1	1

1 Items · Sorted by External Service Name · Last refreshed a few seconds ago

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

25°C

Search

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar at the top. Below it, there are four main categories: Email, Apps, Integrations, and External Services. The External Services category is currently selected, indicated by a blue background. The main content area has a title "External Services" with a "SETUP" icon. It includes a button "Add an External Service". Below this is a summary table with five columns: Total Registrations, Active Operations, Total Operations, Active Objects, and Total Objects. Under "Total Registrations", it says "1 used of 150". Under "Active Operations", it says "1 used of 1,250". Under "Total Operations", it says "1 used of 10,000". Under "Active Objects", it says "0 used of 1,250". Under "Total Objects", it says "0 used of 10,000". Below the table, a message says "1 Items · Sorted by External Service Name · Last refreshed a few seconds ago". A table follows with columns "External Service Name ↑", "D", "Active Operations", and "Total Oper.". One row is shown for "Bunkservice" with values 1, 1, and 1 respectively. At the bottom left, there's a weather widget showing "25°C". At the bottom right, there's a search bar and a user profile icon.

Search Setup

Setup Home Object Manager

remo

SETUP Remote Site Settings

All Remote Sites Help for this Page

Custom Code

Remote Access

Security

Remote Site Settings

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

View: All Remote Sites Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other All

New Remote Site

Action	Remote Site Name	Namespace Prefix	Remote Site URL	Active	Created By
Edit Del	ApexDevNet	-	http://www.apexdevnet.com	✓	EPIC_OrgFarm
Edit Del	FuelService	-	https://insurance.example.com	✓	Mahalaxmi_Miniki

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other All

Search Setup

Setup Home Object Manager

remo

SETUP
Remote Site Settings

All Remote Sites Help for this Page ?

Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click New Remote Site.

View: All Remote Sites Create New View

Action	Remote Site Name	Namespace Prefix	Remote Site URL	Active	Created By
Edit Del	ApexDevNet	-	http://www.apexdevnet.com	<input checked="" type="checkbox"/>	EPIC_OrgFarm
Edit Del	FuelService	-	https://insurance.example.com	<input checked="" type="checkbox"/>	Mahalaxmi_Miniki

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

❖ Outcome: Seamless data exchange between Salesforce and external systems.

Phase 8 – Data Management & Deployment

Objective: Ensure data accuracy and prepare for deployment.

- **Data Import Wizard:** Load supplier and buyer information.
- **Data Loader:** Bulk upload large transaction datasets.
- **Duplicate Rules:** Prevent duplicate records for suppliers and buyers.
- **Data Backup:** Schedule weekly backups for recovery.

- **Change Sets:** Deploy configurations and customizations between environments.
- **Unmanaged vs Managed Packages:** Managed if you want to publish on AppExchange.
- **ANT Migration Tool:** Command-line deployment.
- **VS Code & SFDX:** Dev-friendly deployments.

Search Setup

Setup Home Object Manager

change

Apps

AppExchange Marketplace

Integrations

Change Data Capture

Identity

Token Exchange Handlers

didn't find what you're looking for?
try using Global Search.

SETUP

Change Data Capture

Select the entities that generate change event notifications on the default standard channel. Change Data Capture sends notifications for created, updated, deleted, and undeleted records. All custom objects and a subset of standard objects are supported.

Available Entities

Type to filter list...

Account (Account)
Account Clean Info (Account...)
Account Contact Role (Accou...)
Agent Work (AgentWork)
Appointment (Appointment_...)
Asset (Asset)
Asset Relationship (AssetRela...)
Assigned Resource (Assigned...)
Associated Location (Associa...)

Selected Entities

Buyer (Buyer_c)
Gas station (Gas_station_c)
Fuel detail (Fuel_detail_c)

AIRTELPP 6

Search Setup

Setup Home Object Manager

Choose data Edit mapping Start import Great job

Review & Start Import

Review your import information and click Start Import.

Your selections:

- Fuel details ✓
- Update existing records ✓
- Fuel_Detail_Fields.csv ✓

Your import will include:

Mapped fields	Unmapped fields
4	0

Help for this page ?

Search Setup

Setup Home Object Manager

Q duplic

d SETUP Duplicate Rules

All Duplicate Rules Help for this Page [Expand]

What Are Duplicate Rules? [Expand]

View: All Duplicate Rules ▾

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other [All]

New Rule ▾

Rule Name	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Fuel type	Gas station			<input type="checkbox"/> min		9/23/2025
Phone OR Email must be unique.	Patient			<input type="checkbox"/> min		9/14/2025
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	Account	Standard Account Matching Rule	<input checked="" type="checkbox"/> OEPIC		9/9/2025
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Contact	Standard Lead Matching Rule	<input checked="" type="checkbox"/> OEPIC		9/9/2025
Standard Lead	Identify leads that duplicate		Standard Lead Matching Rule	OEPIC		9/9/2025

https://orgfarm-6cc9db0b01-dev-ed.lightning.force.com/lightning/setup/DuplicateRules/home

Search Setup

Setup Home Object Manager

data exp

▼ Data Data Export

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

SETUP Data Export

Monthly Export Service

Help for this Page ?

Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export process manually or schedule it to run automatically. When an export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also available on this page for 48 hours, after which time they are deleted.

Next scheduled export:
A data export is currently in progress for your organization.

Export Now Schedule Export

Your export has been queued. You will receive an email notification when it is completed.

Scheduled By	Miniki Mahalaxmi
Schedule Date	9/23/2025
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1)

```
... Salesforce CLI ... | ☰ ×

Filter

Changed fuuel
LightningComponentBundle
force-app\main\default\lwc\fuuel\fuuel
.js
Changed fuuel
LightningComponentBundle
force-app\main\default\lwc\fuuel\fuuel
.js-meta.xml

10:58:43.547 Ended SFDX: Deploy This
Source to Org
Starting SFDX: Open Default Org
```

✓ Outcome: Reliable, duplicate-free data with a structured deployment strategy.

Phase 9 – Reporting, Dashboards & Security Review

Objective: Provide insights and enforce strong security.

- Reports: Tabular, Summary, Matrix, and Joined reports for sales, supplier performance, and buyer loyalty.
- **Report Types:** Standard and Custom report types for fuel station-specific insights.

Search Setup

Setup Home Object Manager

reports

Feature Settings

Analytics

Reports & Dashboards

Access Policies

Historical Trending

Report Types

Reporting Snapshots

Reports and Dashboards

Settings

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

SETUP

Custom Report Types

Fuel_detail

Below is the information for this custom report type. You can click the buttons on this to preview or update information for the custom report type

Preview Layout Edit Layout

Clone Delete Close

Details

D.. Fuel_detail
A.. Fuel_detail
D.. data is perfect
C.. Miniki Mahalaxmi, 24/09/2025, 02:47 pm
S... flow

Object ...

Fuel details (A)

A

A

9+ 29°C Haze

Search

Search Setup

Setup Home Object Manager

report

Feature Settings

- Analytics
 - Reports & Dashboards
 - Access Policies
 - Historical Trending
 - Report Types**
 - Reporting Snapshots
 - Reports and Dashboards
 - Settings
- Security
 - Guest User Sharing Rule Access
 - Report**

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

Custom Report Types

New Custom Report Type

15 items • Sorted by Label • Filtered by All custom report types • Updated a few seconds ago

L...	Name	Description	Category	Created By	Create Date
Appoint...	Appointm...	bjh	Flows	min	9/14/2025, ...
Billing ...	Billing_wit...	hjg	Flows	min	9/14/2025, ...
Fuel_de...	Fuel_detail	data is per...	Flows	min	9/24/2025, ...
Orchest...	flow_orche...	Find out w...	Other Rep...	autopro	9/9/2025, ...
Orchest...	flow_orche...	Find out w...	Other Rep...	autopro	9/9/2025, ...
Orchest...	flow_orche...	Find out w...	Other Rep...	autopro	9/9/2025, ...
Orchest...	flow_orche...	Find out w...	Other Rep...	autopro	9/9/2025, ...
Progra...	Program_...	Review yo...	Other Rep...	autopro	9/9/2025, ...
Progra...	Program_...	Review yo...	Other Rep...	autopro	9/9/2025, ...
Progra...	Program_T...	Report on ...	Other Rep...	autopro	9/9/2025, ...
Progra...	Program_T...	Report on ...	Other Rep...	autopro	9/9/2025, ...
Progra...	Program_P...	Report on ...	Other Rep...	autopro	9/9/2025, ...
Progra...	Program_P...	Report on ...	Other Rep...	autopro	9/9/2025, ...

9+ 24°C

The screenshot shows a 'Create Report' dialog box with a dark blue header bar at the top containing navigation items: 'Gas station', 'suppliers', 'Gas stations', 'Buyers', 'Reports', 'More', and a pencil icon.

The main area of the dialog is titled 'Create Report' and contains a sidebar on the left labeled 'Category' with the following sections:

- Activities
- Contracts and Orders
- Price Books, Products and Assets
- Administrative Reports
- File and Content Reports
- Individuals
- Other Reports** (highlighted with a blue border)
- Hidden Report Types

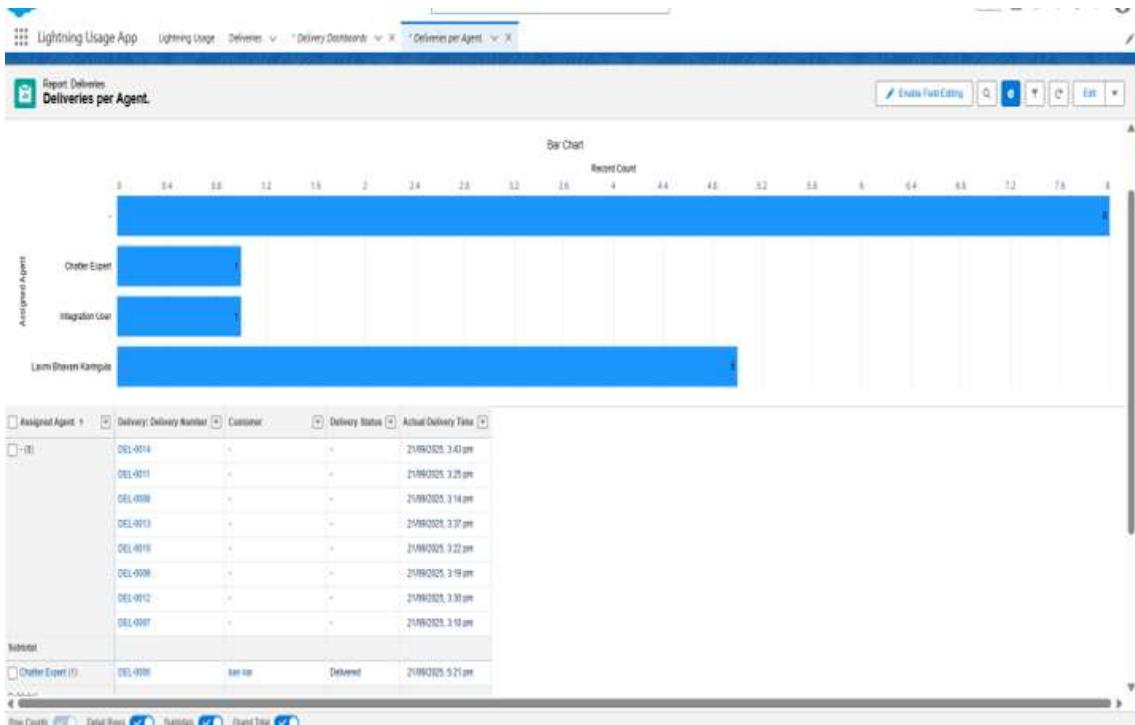
The central part of the dialog is titled 'Select a Report Type' and includes a search bar labeled 'Search Report Types...'. Below the search bar is a list of report types categorized by type (Standard or Custom) and history (Supplier, Gas station, Buyer, Fuel detail, Orchestration).

Type	History	Category
Supplier History	Standard	Supplier History
Gas stations	Standard	Gas stations
Gas stations with Fuel det...	Standard	Gas stations with Fuel det...
Gas station History	Standard	Gas station History
Buyers	Standard	Buyers
Buyer History	Standard	Buyer History
Fuel detail History	Standard	Fuel detail History
Orchestration Run Logs S...	Custom	Orchestration Run Logs S...
Orchestration Work Items ...	Custom	Orchestration Work Items ...
Orchestration Step Runs ...	Custom	Orchestration Step Runs ...
Orchestration Stage Runs	Custom	Orchestration Stage Runs

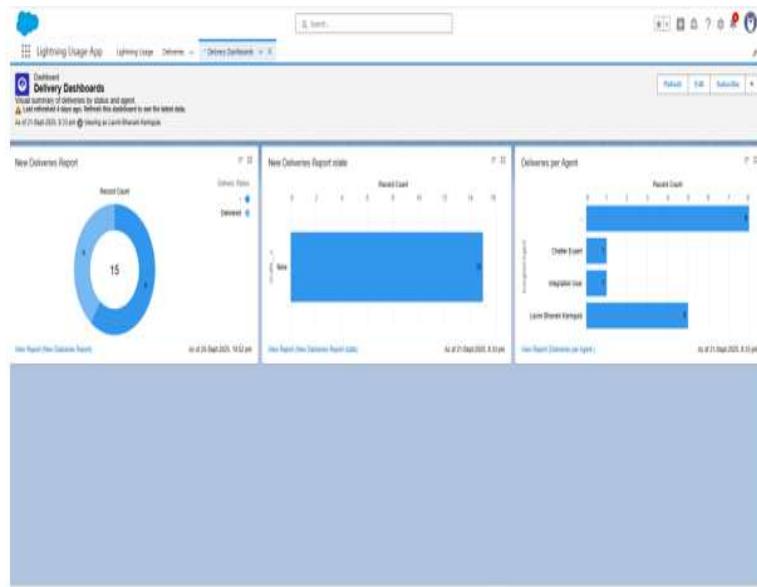
The right side of the dialog is titled 'Details' and contains three sections:

- Fuel data...** Standard R... (with a green icon)
- Start Report** (a blue button)
- Details** (a link)
- Created By You** (No Reports Yet)
- Created By Others** (No Reports Yet)
- Objects Used in Report Type** (with a downward arrow)

- **Dynamic Dashboards:** Role-based visibility for Admin, Manager, Supplier, Buyer.



- **Dashboards:** Revenue trends, Stock usage, Supplier performance, Buyer loyalty programs.



- **Field-Level Security (FLS):** Restrict sensitive data like pricing and customer PII.
- **Sharing Settings:** Configure OWD and Sharing Rules for secure data visibility.
- **Session Settings:** Define session duration, MFA, and timeouts.
- **Login IP Ranges:** Restrict logins to authorized networks.

- **Audit Trail:** Monitor configuration changes and maintain compliance.

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar labeled "Search Setup". Below it, the navigation bar includes "Setup", "Home", and "Object Manager". A sidebar on the left contains a search bar with "reports" and a tree view of features: Feature Settings, Analytics, Reports & Dashboards (which is expanded to show Access Policies, Historical Trending, Report Types, Reporting Snapshots, Reports and Dashboards, and Settings). A message at the bottom of the sidebar says "Didn't find what you're looking for? Try using Global Search." At the bottom of the screen, there are weather icons (9+ 29°C Haze), a search bar, and a decorative graphic.

Custom Report Types

Fuel_detail

Below is the information for this custom report type. You can click the buttons on this to preview or update information for the custom report type

Details

- D.. Fuel_detail
- A.. Fuel_detail
- D.. data is perfect
- C.. Miniki Mahalaxmi, 24/09/2025, 02:47 pm
- S... flow

Object ...

Fuel details (A)

A

A

❖ Outcome: Powerful analytics and dashboards with role-based security and compliance monitoring.

Phase 10 – Final Presentation & Demo Day

Objective: Showcase the final CRM solution to stakeholders.

- Pitch: Present the problem, solution, and business benefits.
- Demo: Walk through key flows – creating transactions, updating stock, generating reports.
- Documentation: Deliver a comprehensive User and Admin guide.

- Showcase: Publish project details on LinkedIn or professional portfolio.
- ❖ Outcome: Outcome: A successful project delivery with clear demonstration of value and professional presentation.