

CRM Application For Jewel Management

CRM Application For Jewel Management

Salesforce

Introduction:

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. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?".

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organised something like this:

<https://youtu.be/r9EX3IGde5k>

MILESTONE-1

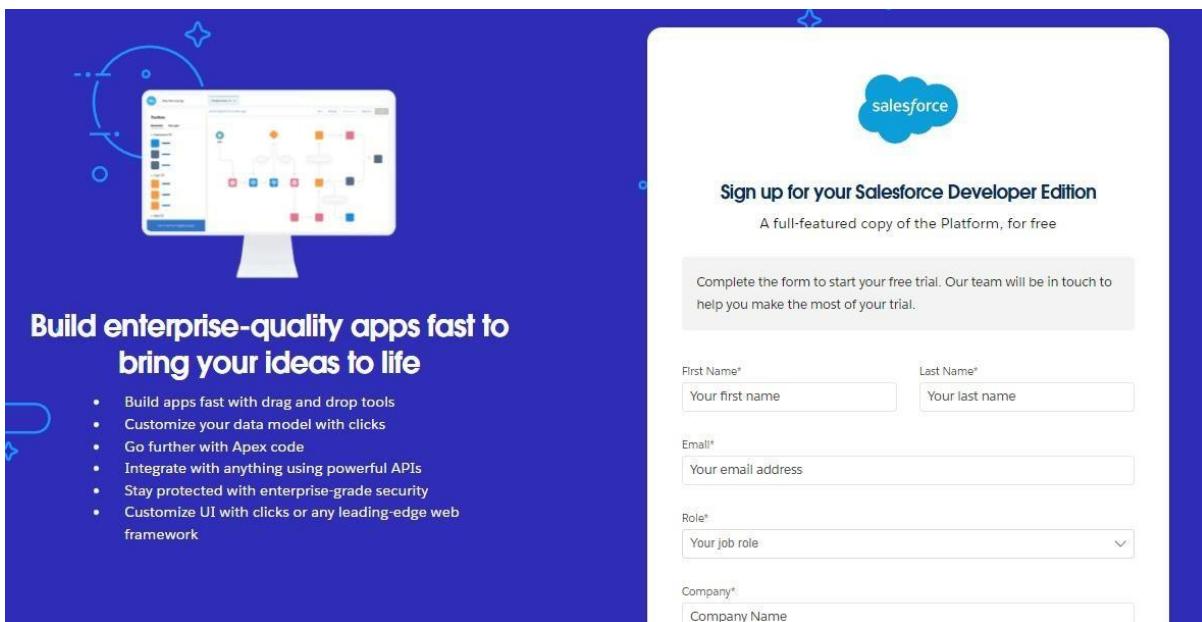
Creating Developer Account

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup> 2.

On the sign up form, enter the following details :

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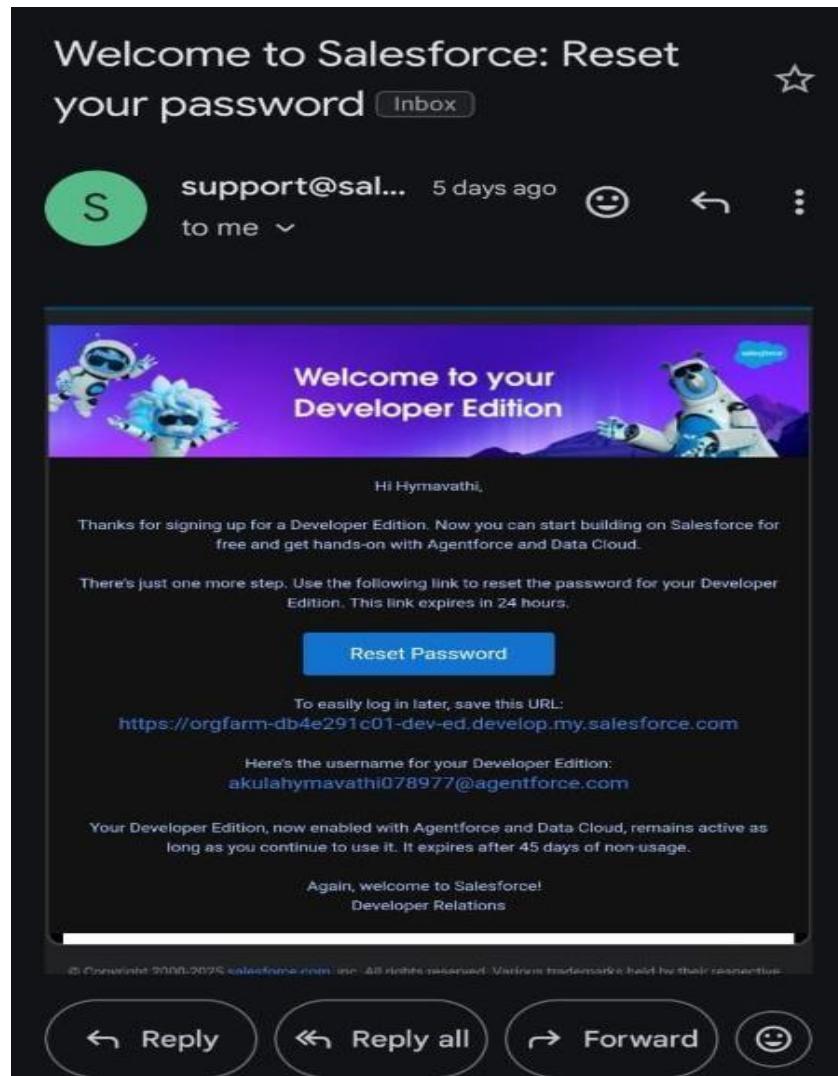


- 1. First name** : Nagarjuna
- 2. Last name** : Vemula
- 3. Email** : nvemula340@gmail.com
- 4. Role** : Developer
- 5. Company** : VR Siddhartha Engineering College-Vijayawada
- 6. County** : India
- 7. Postal Code** : 520017
- 8. Username** : nemula340568@agentforce.com

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.

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2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

Change Your Password

Enter a new password for lead@sb.oom.
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

* Confirm New Password
..... Match

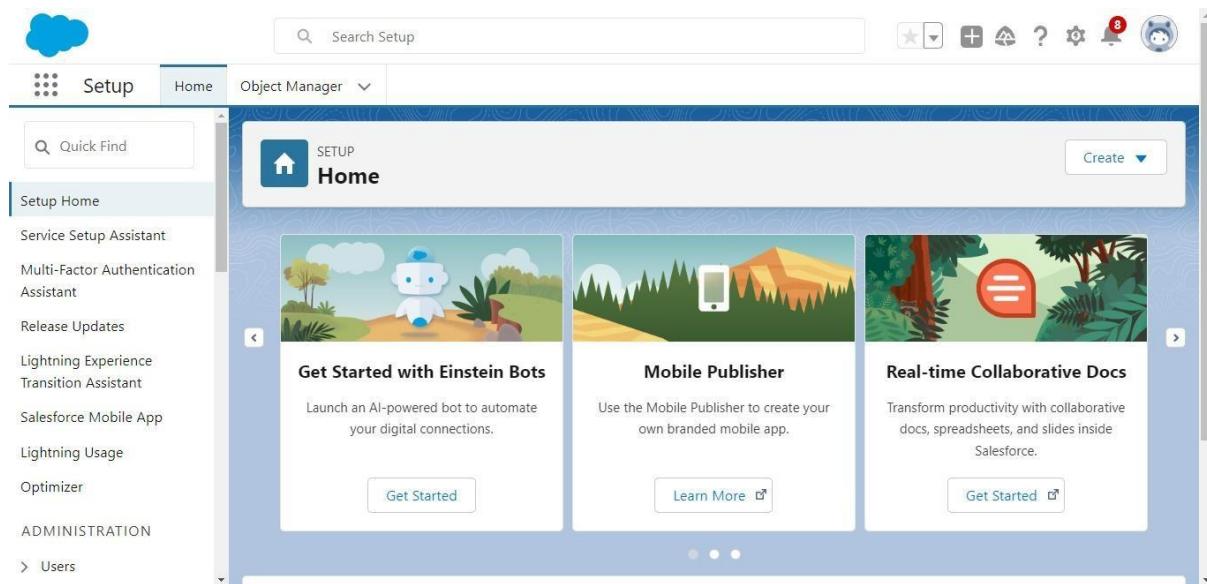
Security Question
In what city were you born?

* Answer
asdfghjkl

Change Password

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4.Then you will redirect to your salesforce setup page.



MILESTONE-2

Object

Create Jewel Customer Object

The purpose of creating a Jewel Customer custom object is to store and manage information about Customer. To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
2. Enter the label name >> Jewel Customer
3. Plural label name >> Jewel Customers
4. Enter Record Name Label and Format
 - Record Name >> Customer name
 - Data Type >> Text

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5. Click on Allow reports.
6. Allow search >> Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Jewel Customer'. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main panel is titled 'Details' and contains fields for 'Description', 'API Name' (set to 'Jewel_Customer__c'), 'Custom' (with a dropdown menu showing 'Singular Label' and 'Plural Label'), and 'Deployment Status' (set to 'Deployed'). There are also sections for 'Enable Reports' (checked), 'Track Activities', 'Track Field History', and 'Help Settings' (linking to 'Standard salesforce.com Help Window'). At the bottom right of the main panel are 'Edit' and 'Delete' buttons.

Create Item Object

The purpose of creating a Item object is to manage the inventory of gold and silver items. 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 >> Item
 2. Plural label name >> Items
 3. Enter Record Name Label and Format
 - Record Name >> Item Id
 - Data Type >> Auto Number
 - Display Format >> Item-{00}
 - Starting Number >> 1
2. Click on Allow reports.
3. Allow search >> Save.

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The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with icons for Home, Object Manager, and a search bar labeled "Search Setup". Below the navigation is a header bar with "SETUP > OBJECT MANAGER" and the object name "Item". On the left, a sidebar lists various setup categories: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled "Details" and contains fields for "Description", "API Name" (set to "Item__c"), "Custom" (set to "✓"), "Singular Label" (set to "Item"), "Plural Label" (set to "Items"), and "Enable Reports" (set to "✓"). There are also sections for "Track Activities", "Track Field History", "Deployment Status" (set to "Deployed"), "Help Settings", and a link to "Standard salesforce.com Help Window". At the bottom right of the main content area are "Edit" and "Delete" buttons. The URL in the browser address bar is: <https://orafarm-cd4eee998a-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/01IaK000000sVTR/AlohaSearchLayouts/view>.

Create Customer Order Object

The purpose of creating a Item object is to manage the inventory of gold and silver items.

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 >> Customer Order
 2. Plural label name >> Customer Orders
 3. Enter Record Name Label and Format
 - Record Name >> Customer Order No
 - Data Type >> Auto Number
 - Display Format >> Order - {0000}
 - Starting Number >> 1
2. Click on Allow reports.
3. Allow search >> Save.

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The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a cloud icon, 'Setup' (selected), 'Home', and 'Object Manager'. A search bar says 'Search Setup' and various global buttons are on the right. The main area shows 'SETUP > OBJECT MANAGER' and 'Customer Order'. On the left, a sidebar lists options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The main 'Details' section shows the API Name 'Customer_Order__c' and its label 'Customer Order'. It also shows 'Enable Reports' checked, 'Track Activities' unchecked, 'Track Field History' unchecked, 'Deployment Status' set to 'Deployed', and 'Help Settings' pointing to 'Standard salesforce.com Help Window'. Buttons 'Edit' and 'Delete' are at the top right.

Create Price Object

The purpose of creating a Item object is to manage the inventory of gold and silver items.

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 >> Price
 2. Plural label name >> Prices
 3. Enter Record Name Label and Format
 - Record Name >> Item Price
 - Data Type >> Text
2. Click on Allow reports.
3. Allow search >> Save.

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The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a cloud icon, 'Setup', 'Home', and 'Object Manager'. A search bar says 'Search Setup' with a magnifying glass icon. To the right are icons for star, plus, document, question mark, gear, bell, and refresh. The main area has a header 'SETUP > OBJECT MANAGER' and 'Price'. On the left is a sidebar with 'Details' selected and a list of options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main panel shows 'Details' for the Price object. It includes fields for Description, API Name (Price__c), Singular Label (Price), Plural Label (Prices), Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window.

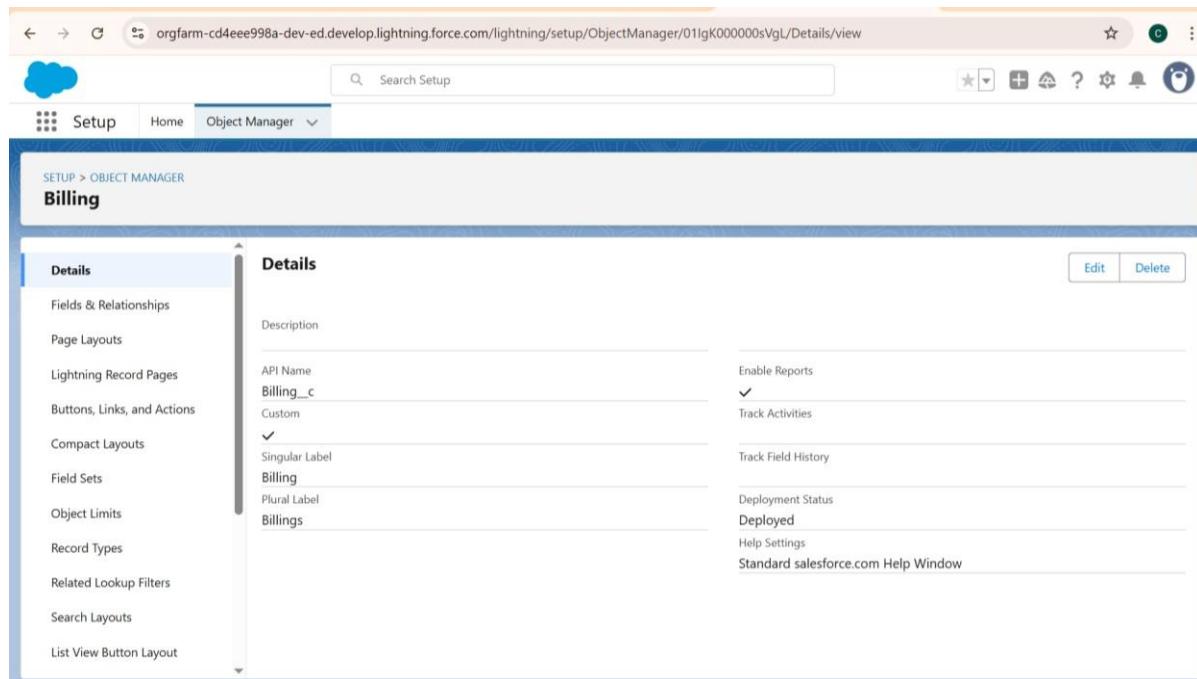
Create Billing Object

The purpose of creating a Item object is to manage the inventory of gold and silver items.

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 >> Billing
 2. Plural label name >> Billings
 3. Enter Record Name Label and Format
 - Record Name >> Billing Name
 - Data Type >> Text
2. Click on Allow reports.
3. Allow search >> Save.

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The screenshot shows the Salesforce Object Manager interface for the 'Billing' object. The left sidebar lists various configuration tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area displays the 'Details' tab for the 'Billing' object. It includes fields for Description, API Name (Billing_c), Singular Label (Billing), and Plural Label (Billings). Other settings shown include Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and a link to the Standard salesforce.com Help Window. Top navigation includes Setup, Home, and Object Manager, along with a search bar and various icons.

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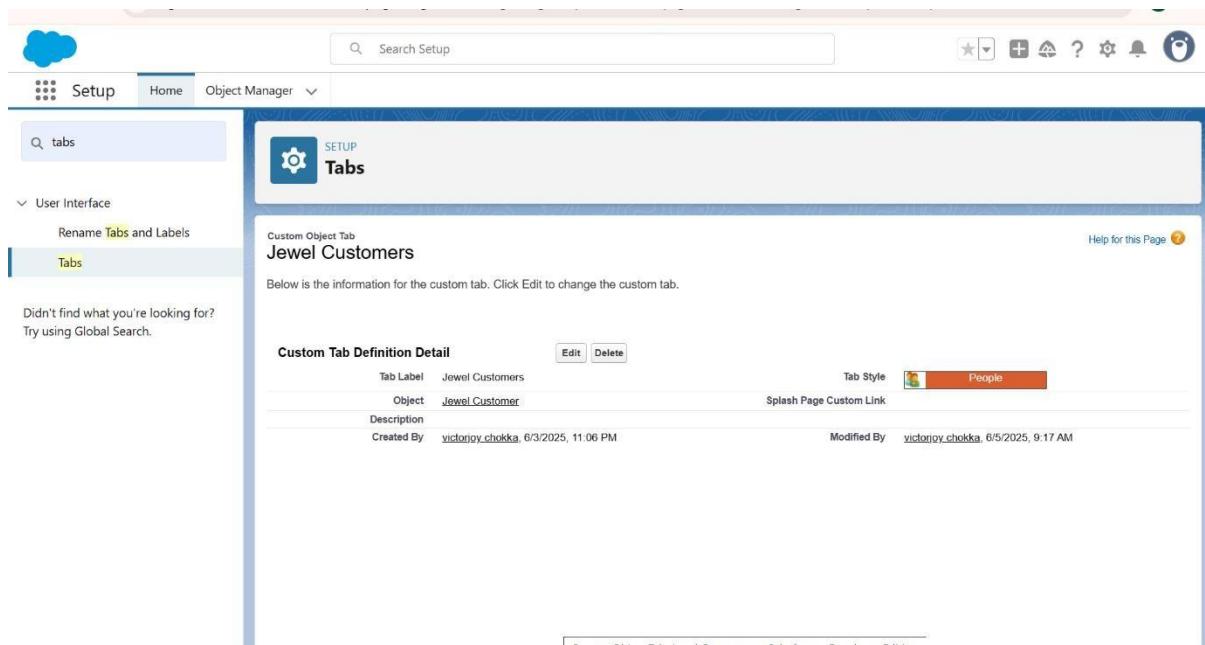
MILESTONE-3

Tabs

Creating a Custom Tab

To create a Tab:(Customer)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab).
2. Select Object(Jewel Customer) >> Select any tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) keep it as default >> Save.



To create a Tab:(Item)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Item) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) keep it as default >> Save.

Note: Now create tabs for Customer Order, Price, Billing objects.

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The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/setup/CustomTabs/home>. The page title is "Custom Tabs". The left sidebar has a search bar and links for "User Interface", "Rename Tabs and Labels", and "Tabs". The main content area displays "Custom Object Tabs" and "Web Tabs".

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Billings	Ticket	
Edit Del	Customer Orders	Postage	
Edit Del	Items	Box	
Edit Del	Jewel Customers	People	
Edit Del	Prices	Treasure chest	

Web Tabs

New | What Is This?

No Web Tabs have been defined.

MILESTONE-4

The Lightning App Create
a Lightning App

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To create a lightning app page:

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

2. Fill the app name in app details and branding as follow

App Name : Jewelry Inventory System.

Developer Name : This will auto populated

Description : Elevate your look with elegance

Image : optional (if you want to give any image you can otherwise not mandatory)

Primary colour hex value : keep this default.

3. Then click Next >> (App option page) Set Navigation Style as Console Navigation >> Next.

4. (Utility Items) keep it as default >> Next.

5. To Add Navigation Items: Search for the item in the (JewelCustomer, Item, CustomerOrder, Price, Billing, Reports, Dashboard) from the search bar and move it using the arrow button >> Next >> Next.

6. To Add User Profiles:

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

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Lightning App Builder App Settings Pages Jewelry Inventory System ? Help

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 Primary Color Hex Value



Clear

Org Theme Options

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

App Launcher Preview



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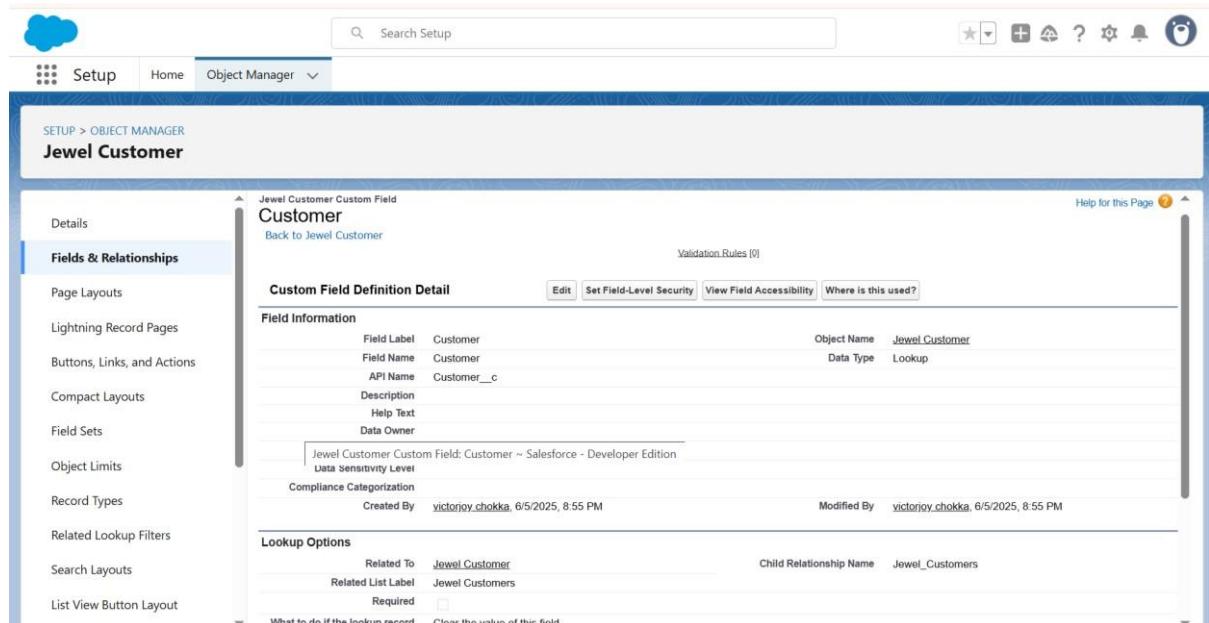
MILESTONE-5

Fields

Creating Lookup Relationship

To Create a relationship between Jewel Customer & Customer Order Objects.

1. Go to the setup page >> click on object manager >> type object name(Customer Order) in the quick find bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select "Lookup relationship" as data type and click Next.
4. Select the related object "Jewel Customer".
5. Give Field Label as "Customer" and click Next.
6. Next >> Next >> Save.



Creating a Master-Detail Relationship

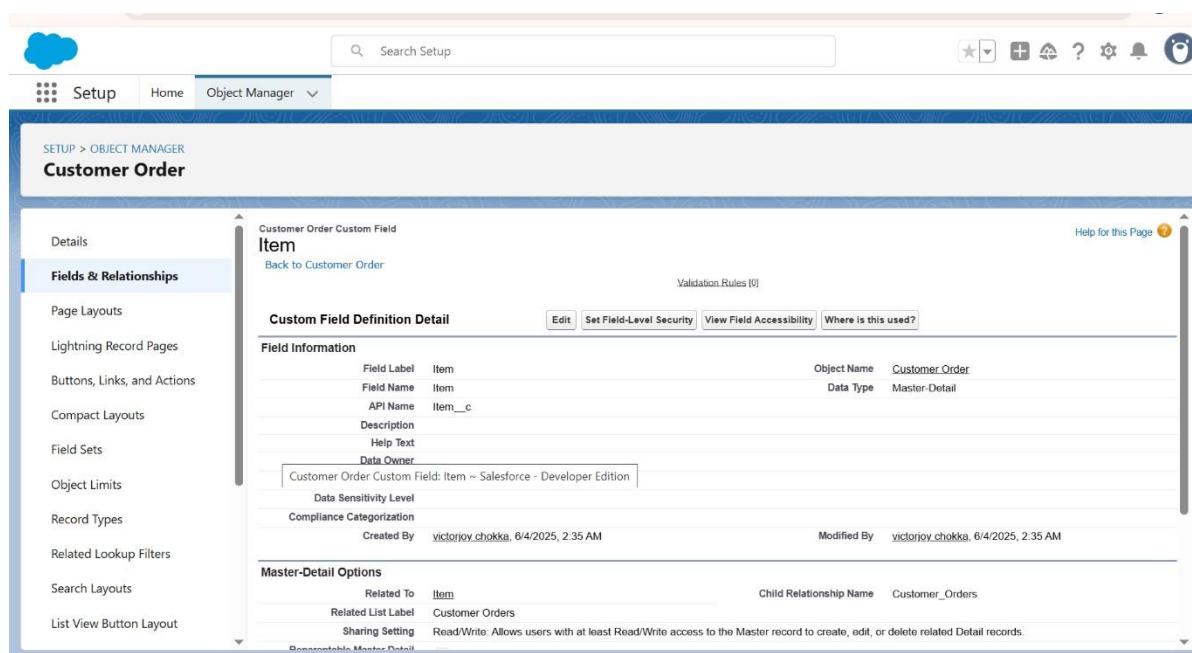
Master-detail relationship is a type of relationship between two objects where the master object controls certain behaviours and settings of the detail object. Here are a few use cases that demonstrate the use of master-detail relationships

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Creating Master-Detail Relationship between Item & Customer Order Object.

To Create a Master-Detail relationship :

1. Go to the setup page >> click on object manager >> type object name(Customer Order) in the quick find bar >> click on the object.
2. Click on fields & relationships >> click on New.
3. Select "Master-Detail relationship" as data type and click Next.
4. Select the related object " Item".
5. Give Field Label as "Item" and click Next.
6. Next >> Next >> Save.



Creating Text Field in Jewel Customer Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New

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3. Select Data type as "Text".
4. Click on Next
5. Fill the above as following:
 - o Field Label: City o Length : 20 o Field Name : gets auto generated o Click on Next >> Next >> Save and new.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a cloud icon, 'Search Setup', and various global buttons. The main header reads 'SETUP > OBJECT MANAGER' and 'Jewel Customer'. On the left, a sidebar lists options like 'Details', 'Fields & Relationships' (which is selected), and 'Page Layouts'. The main content area displays the 'Custom Field Definition Detail' for 'Jewel Customer Custom Field' named 'City'. It shows the field's properties: Field Label: City, Field Name: City, API Name: City__c, Description: Help Text, Data Owner: Field Usage, Data Sensitivity Level: Low, Compliance Categorization: Standard, Created By: victorjoy.chokka, 6/3/2025, 11:27 PM, Modified By: victorjoy.chokka, 6/3/2025, 11:27 PM. Under 'General Options', 'Required' is checked, while 'Unique' and 'Case Sensitive' are unchecked. A 'Help for this Page' link is also visible.

Creating the Phone field in object Jewel Customer

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as "Phone" and click Next.
4. Given the Field Label as " Phone".
5. Field Name will be auto populated, and click on Next? Next >> Save & new.

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The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named 'Phone' has been created for the 'Jewel Customer' object. The field is of type 'Phone' with the API name 'Phone__c'. It is labeled 'Phone' and has a help text of 'Data Owner'. The field is required and has a default value. The object name is 'Jewel Customer' and the data type is 'Phone'. The field was modified by 'victorjoy.chokka' on 6/3/2025, 11:27 PM.

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as "Email" and click Next.
4. Given the Field Label as " Email".
5. Field Name will be auto populated, and click on Next >> Next >> Save.

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named 'Email' has been created for the 'Jewel Customer' object. The field is of type 'Email' with the API name 'Email__c'. It is labeled 'Email' and has a help text of 'Data Owner'. The field is required and has a unique constraint. The object name is 'Jewel Customer' and the data type is 'Email'. The field was created by 'victorjoy.chokka' on 6/3/2025, 11:28 PM and modified by 'victorjoy.chokka' on 6/3/2025, 11:28 PM.

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Creating the number field in Item object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Number” and click Next.
4. Given the Field Label as “ Purity” and length as “ 2 ”.
5. Field Name will be auto populated, and click on Next >> Next >> Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. Below this, the 'SETUP > OBJECT MANAGER' path is shown. The main area is titled 'Item' and displays a 'Custom Field Definition Detail' for a field named 'Purity'. The 'Field Information' tab is selected, showing details like Field Label ('Purity'), Field Name ('Purity'), API Name ('Purity__c'), and Data Type ('Number'). Other tabs include 'Validation Rules [0]', 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'General Options' tab is also visible, with checkboxes for 'Required', 'Unique', and 'External ID'. On the left, a sidebar lists various customization options for the 'Item' object, such as 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', etc.

Creating Picklist Field in Item Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” ? New.
3. Select Data type as “Picklist” and click Next.
4. Enter Field Label as “Item Type”.
5. In values select “Enter values(Gold,Silver), with each value separated by a new line” and enter values as shown below.
6. Click Next >> Next >> Next >> Save .

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The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named 'Item Type' is being created for the 'Item' object. The field is of type 'Picklist' and has a length of 8 characters. It is required and has a default value. The field is used for Item Custom Field: Item Type - Salesforce - Developer Edition.

Creating Currency Field in Price Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Price) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Currency" and click Next.
4. Enter Field Label as "Gold Price" and length as " 8"and decimal 5.Field name will be auto generated.
5. Click Next >> Next >> Next >> Save .

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named 'Gold Price' is being created for the 'Price' object. The field is of type 'Currency' and has a length of 8 characters. It is required and has a default value. The field is used for Price Custom Field: Gold Price - Salesforce - Developer Edition.

Creating Formula Field(Cross Object) in Item Object

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To create fields in an object:

(Note: Create a Lookup Relationship in Item Object to Price Object with Field Name: Prices)

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Gold Price" and select formula return type as "Currency" and click next.
5. Under Advanced Formula write down the formula : Prices__r.Gold_price__c /10.
6. Click "Check Syntax" and Next >> Next >> Save & New.

The screenshot shows the Salesforce Setup interface for creating a custom field. The URL in the browser is <https://orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IgK00000sVTR/FieldsAndRelationships/00NgK0000131tt3/view>. The page title is "Item Custom Field Gold Price". The "Fields & Relationships" tab is selected in the sidebar. The main content area shows the "Custom Field Definition Detail" for the "Gold Price" field. The "Field Information" section includes details like Field Label (Gold Price), Field Name (Gold_Price), API Name (Gold_Price__c), and Data Type (Formula). The "Formula Options" section shows the formula as "Prices__r.Gold_Price__c / 10". The "Data Type" is set to "Formula" and "Decimal Places" is set to 2.

Creating Text Field in Jewel Customer Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.

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2. Now click on "Fields & Relationships" >> New
3. Select Data type as "Text".
4. Click on Next
5. Fill the above as following:
 - Field Label: State ○ Length : 20 ○ Field Name : gets auto generated ○ Click on Next >> Next >> Save and new.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, 'Setup', 'Home', 'Object Manager', and various global icons. The main title is 'SETUP > OBJECT MANAGER' followed by 'Jewel Customer'. On the left, a sidebar lists options like 'Details', 'Fields & Relationships' (which is selected), and other layout-related items. The main content area displays the 'Custom Field Definition Detail' for a field named 'State'. The 'Field Information' section shows the field label as 'State', field name as 'State', API name as 'State__c', and data type as 'Text'. It also shows the object name as 'Jewel Customer'. The 'General Options' section includes checkboxes for 'Required', 'Unique', and 'Case Sensitive'. At the bottom, it shows the creation and modification details: 'Created By' is 'victorjoy_chokka, 6/3/2025, 11:24 PM' and 'Modified By' is 'victorjoy_chokka, 6/3/2025, 11:24 PM'.

Creating Text Field in Jewel Customer Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Jewel Customer) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as "Text".
4. Click on Next
5. Fill the above as following:

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○ Field Label: Street ○ Length : 20 ○ Field

Name : gets auto generated ○ Click on

Next >> Next >> Save and new.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A custom field named 'Street' is being edited for the 'Jewel Customer' object. The field has a length of 20 characters and is of type Text. It is required and case sensitive. The field was created by 'victorjoy.chokka' on 6/3/2025, 11:25 PM.

Field Information	Value
Field Label	Street
Field Name	Street
API Name	Street__c
Description	Help Text
Data Owner	Field Usage
Data Sensitivity Level	Compliance Categorization
Created By	victorjoy.chokka, 6/3/2025, 11:25 PM
Modified By	victorjoy.chokka, 6/3/2025, 11:25 PM

General Options	Value
Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
Case Sensitive	<input type="checkbox"/>

Creating Text Field in Jewel Customer Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as "Text".
4. Click on Next
5. Fill the above as following:

○ Field Label: Country ○ Length : 18 ○ Field

Name : gets auto generated ○ Click on

Next >> Next >> Save and new.

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The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A custom field named 'Country' is being edited for the 'Jewel Customer' object. The field is defined as a Text type with a label 'Country'. It has a unique API name 'Country__c'. The 'General Options' section includes checkboxes for 'Required', 'Unique', and 'Case Sensitive'.

Creating Text Field in Jewel Customer Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Jewel Customer) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as "Text".
4. Click on Next
5. Fill the above as following:
 - Field Label: Zip/Postal code ○
Length : 6 ○ Field Name : gets auto generated

Click on Next >> Next >> Save and new

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The screenshot shows the Salesforce Object Manager interface. A custom field named 'Zip/Postal code' is being created for the 'Jewel Customer' object. The field is defined with the following details:

- Field Label:** Zip/Postal code
- Field Name:** Zip_Postal_code
- API Name:** Zip_Postal_code_c
- Description:** Back to Jewel Customer
- Data Type:** Text
- Object Name:** Jewel Customer
- Created By:** victorjoy.chokka, 6/3/2025, 11:26 PM
- Modified By:** victorjoy.chokka, 6/3/2025, 11:26 PM

Creating Currency Field in Price Object To

create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Price) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Currency" and click Next.
4. Enter Field Label as " Silver Price" and length as " 8"and decimal 5.Field name will be auto generated.
5. Click Next >> Next >> Next >> Save .

The screenshot shows the Salesforce Object Manager interface. A custom field named 'Silver Price' is being created for the 'Price' object. The field is defined with the following details:

- Field Label:** Silver Price
- Field Name:** Silver_Price
- API Name:** Silver_Price_c
- Description:** Back to Price
- Data Type:** Currency
- Object Name:** Price
- Created By:** victorjoy.chokka, 6/3/2025, 11:30 PM
- Modified By:** victorjoy.chokka, 6/3/2025, 11:30 PM

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Creating Lookup Relationship

1. Go to the setup page >> click on object manager >> type object name (Item) in the quick find bar >> click on the object
2. Click on fields & relationship >> click on New.
3. Select "Lookup relationship" as data type and click Next.
4. Select the related object "Jewel Customer".
5. Give Field Label as "Customer Name" and click Next.
6. Next >> Next >> Save.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes links for Home, Object Manager, and various system icons. The main title is 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists options like Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area displays a custom field named 'Customer Name' for the 'Item' object. The 'Custom Field Definition Detail' section shows the field label 'Customer Name', field name 'Customer_Name', API name 'Customer_Name__c', object name 'Item', and data type 'Lookup'. It also shows validation rules, field-level security, and where it is used. The 'Field Information' section provides details about the field's creation and modification. The 'Lookup Options' section specifies the related object as 'Jewel Customer' and the related list label as 'Items'. A 'Help for this Page' link is also present.

Creating Text Field in Item Object

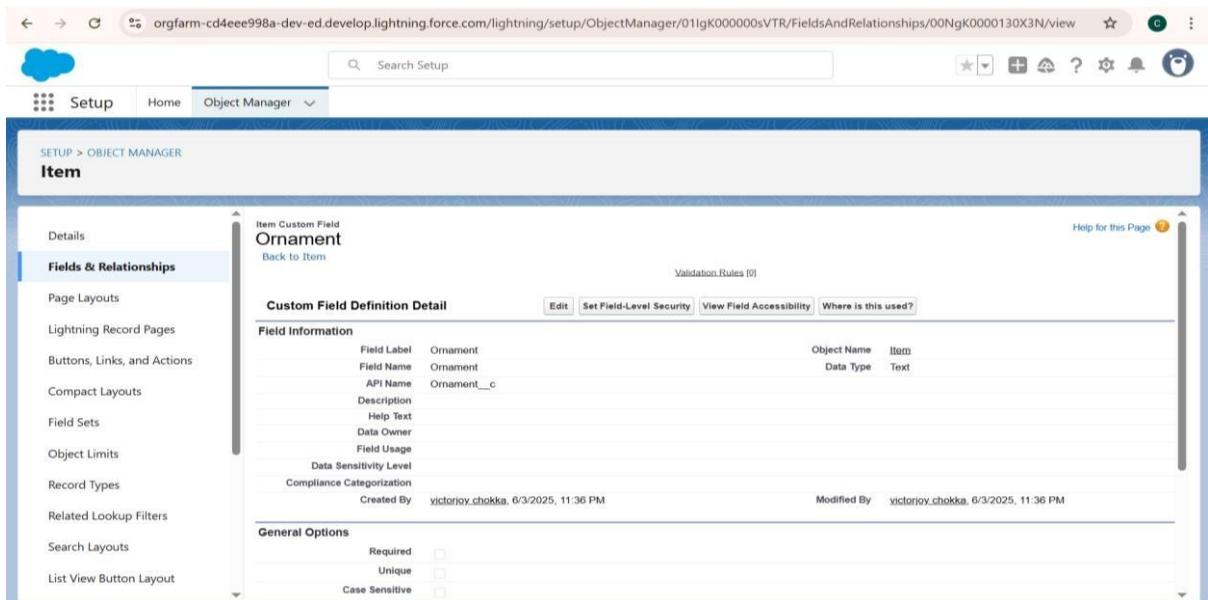
To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New

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3. Select Data type as "Text".
4. Click on Next
5. Fill the above as following:
 - o Field Label: Ornament o Length : 20

Field Name : gets auto generated o Click on Next >> Next >> Save and new.

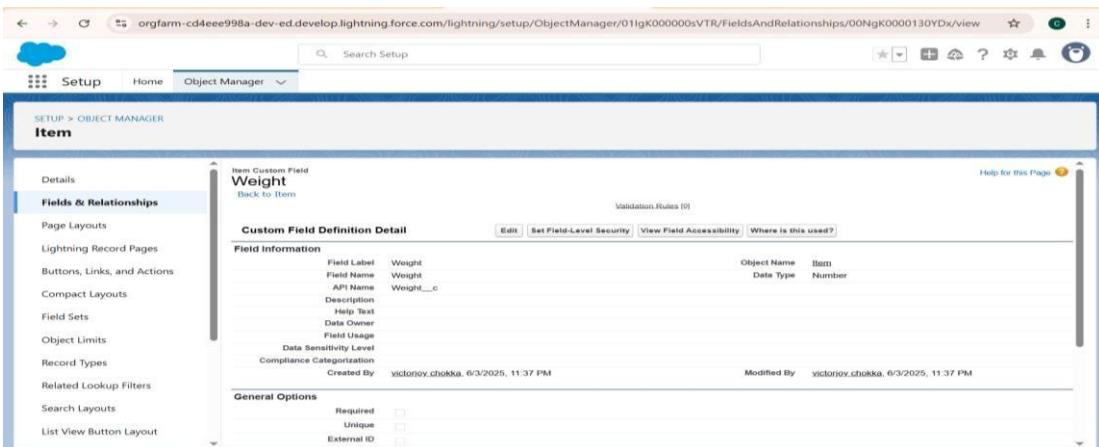


Creating the number field in Item object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as "Number" and click Next.
4. Given the Field Label as "Weight" and length as "8", Decimal as "5".
5. Field Name will be auto populated, and click on Next >> Next >> Save.

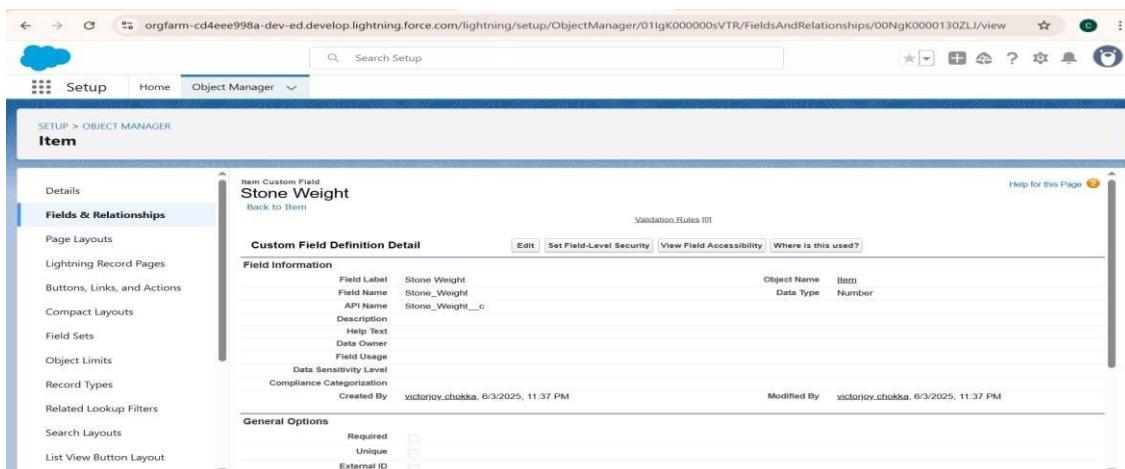
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Creating the number field in Item object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as "Number" and click Next.
4. Given the Field Label as " Stone Weight " and length as " 5 ", Decimal as "5".
5. Field Name will be auto populated, and click on Next >> Next >> Save.

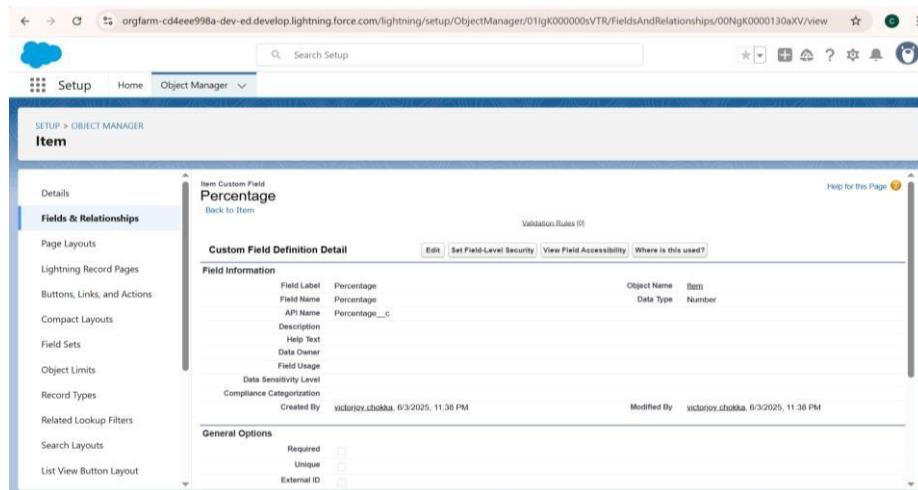


Creating the number field in Item object

To create fields in an object:

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1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as "Number" and click Next.
4. Given the Field Label as " Percentage" and length as " 2 " , Decimal as " 0 ".
5. Field Name will be auto populated, and click on Next >> Next >> Save.



Creating the number field in Item object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as "Currency" and click Next.
4. Given the Field Label as " Stone/Other Price" and length as " 8 " , Decimal as " 2 ".
5. Field Name will be auto populated, and click on Next >> Next >> Save.

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The screenshot shows the Salesforce Object Manager interface. A custom field named 'Stone/Other Price' has been created for the 'Item' object. The field is of type 'Currency'. The 'Field Information' section shows details like Field Label, Field Name, API Name, Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, and the date it was created by 'victorjoy.chokka'. The 'General Options' section includes 'Validation Rules [0]', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The left sidebar lists various setup options for the 'Item' object.

Creating Picklist Field in Item Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" ? New.
3. Select Data type as "Picklist" and click Next.
4. Enter Field Label as "Expected Days Of Return".
5. In values select "Enter values (1-3 Days, 4-5 Days, 6-7 Days, 8-10 Days), with each value separated by a new line" and enter values as shown below.
6. Click Next >> Next >> Next >> Save .

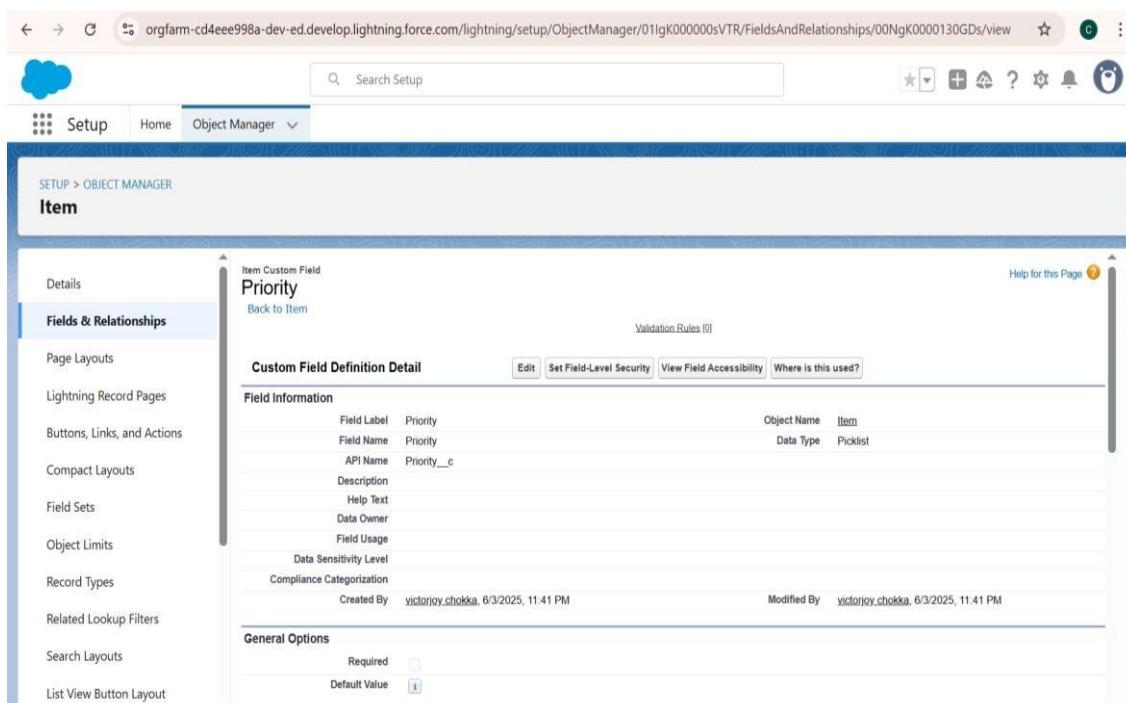
The screenshot shows the Salesforce Object Manager interface. A picklist field named 'Expected Days Of Return' has been created for the 'Item' object. The field is of type 'Picklist'. The 'Field Information' section shows details like Field Label, Field Name, API Name, Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, and the date it was created by 'victorjoy.chokka'. The 'General Options' section includes 'Validation Rules [0]', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The left sidebar lists various setup options for the 'Item' object.

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Creating Picklist Field in Item Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" ? New.
3. Select Data type as "Picklist" and click Next.
4. Enter Field Label as "Priority".
5. In values select "Enter values (Low, Medium, High, Critical), with each value separated by a new line" and enter values as shown below.
6. Click Next >> Next >> Next >> Save .

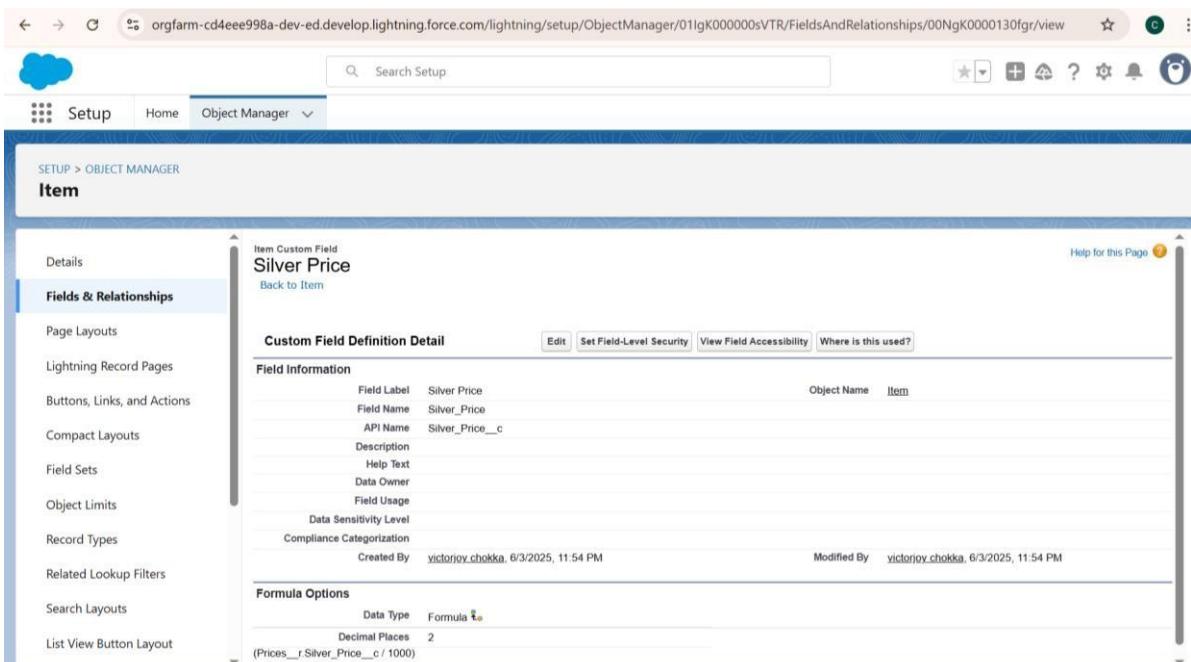


Creating Formula Field in Item Object

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.

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4. Give Field Label and Field Name as "Silver Price" and select formula return type as "Number" and Decimal as " 3 " and click next.
5. Under Advanced Formula write down the formula : (Prices__r.Silver_price__c / 1000).
6. Click "Check Syntax" and Next >> Next >> Save & New.



Creating Formula Field in Item Object

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Purity Gold Price" and select formula return type as "Currency" and Decimal as " 2 " and click next.
5. Under Advanced Formula write down the formula : ((Prices__r.Gold_price__c * Purity__c) / 24) / 10
6. click "Check Syntax" and Next >> Next >> Save & New.

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The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Item' object. A new custom field 'Purity Gold Price' is being created. The 'Field Information' section shows the field label 'Purity Gold Price', field name 'Purity_Gold_Price', and API name 'Purity_Gold_Price_c'. The 'Formula Options' section shows the formula $(Prices__r.Gold_Price__c * Purity__c) / 24$. Other details like Data Type (Formula), Decimal Places (2), and Created By (victorjoy.chokka) are also visible.

Creating Formula Field in Item Object

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Total Weight" and select formula return type as "Number" and Decimal as " 3 " and click next.
5. Under Advanced Formula write down the formula : $(Weight__c - Stone_Weight__c)$
6. click "Check Syntax" and Next >> Next >> Save & New.

The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Item' object. A new custom field 'Total Weight' is being created. The 'Field Information' section shows the field label 'Total Weight', field name 'Total_Weight', and API name 'Total_Weight_c'. The 'Formula Options' section shows the formula $(Weight__c - Stone_Weight__c)$. Other details like Data Type (Formula), Decimal Places (3), and Created By (victorjoy.chokka) are also visible.

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Creating Formula Field in Item Object

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Amount" and select formula return type as "Currency" and Decimal as " 3 " and click next.
5. Under Advanced Formula write down the formula : IF(ISPICKVAL(Item_Type_c , "Gold"), Total_weight_c * Purity_Gold_price_c , Total_weight_c * Silver_price_c)
6. click "Check Syntax" and Next >> Next >> Save & New.

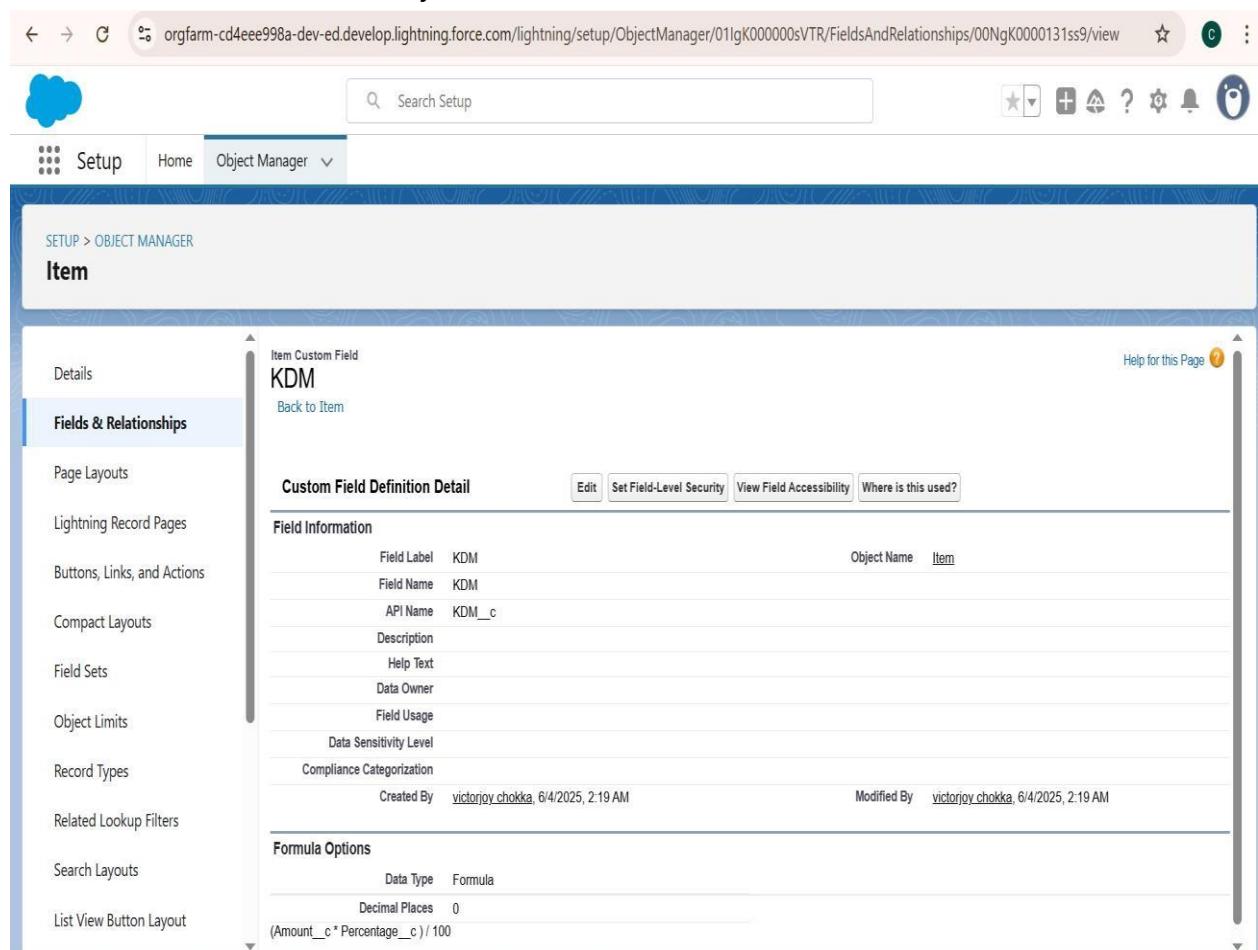
The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** orgfarm-cd4eee998a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK00000sVTR/FieldsAndRelationships/00NgK0000131GyA/view
- Navigation Bar:** Setup, Home, Object Manager
- Section:** SETUP > OBJECT MANAGER
- Object:** Item
- Field Definition:** Item Custom Field: Amount ~ Salesforce - Developer Edition
- Field Details:**
 - Field Label: Amount
 - Field Name: Amount
 - API Name: Amount_c
 - Description: Help Text
 - Data Owner: (not specified)
 - Field Usage: (not specified)
 - Data Sensitivity Level: (not specified)
 - Compliance Categorization: (not specified)
 - Created By: victorjoy_chokka, 6/4/2025, 2:16 AM
 - Modified By: victorjoy_chokka, 6/4/2025, 2:16 AM
- Formula Options:**
 - Data Type: Formula
 - Decimal Places: 3
 - Formula: IF(ISPICKVAL(Item_Type_c , "Gold"), Total_Weight_c * Purity_Gold_Price_c , Total_Weight_c * Silver_Price_c)

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Creating Formula Field in Item Object

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "KDM" and select formula return type as "Currency" and Decimal as " 0 " and click next.
5. Under Advanced Formula write down the formula:
:
 $(Amount_c * Percentage_c) / 100$
6. Click "Check Syntax" and Next >> Next >> Save & New.



The screenshot shows the Salesforce Setup interface for creating a custom field. The URL in the browser is <https://orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK00000sVTR/FieldsAndRelationships/00NgK0000131ss9/view>.

The page title is "SETUP > OBJECT MANAGER" and the specific object is "Item".

The left sidebar menu under "Fields & Relationships" includes options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout.

The main content area displays the "Custom Field Definition Detail" for the "KDM" field. It shows the following details:

Field Information	Object Name	Item	
Field Label	KDM		
Field Name	KDM		
API Name	KDM_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	victorjoy_chokka, 6/4/2025, 2:19 AM	Modified By	victorjoy_chokka, 6/4/2025, 2:19 AM

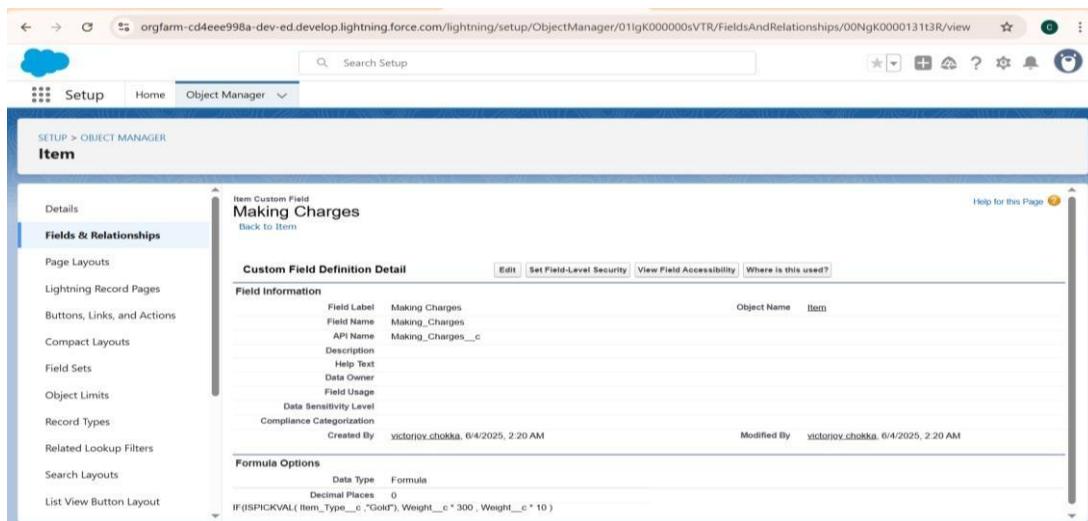
Under "Formula Options", the data type is set to "Formula" with 0 decimal places, and the formula is defined as $(Amount_c * Percentage_c) / 100$.

Creating Formula Field in Item Object

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.

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2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Making Charges" and select formula return type as "Currency" and Decimal as " 0 " and click next.
5. Under Advanced Formula write down the formula : IF(ISPICKVAL(Item_Type_c , "Gold"), Weight_c * 300 , Weight_c * 10)
6. Click "Check Syntax" and Next >> Next >> Save & New.



Creating Picklist Field in Customer Order Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" ? New.
3. Select Data type as "Picklist" and click Next.
4. Enter Field Label as "Order Status".
5. In values select "Enter values(Started, NotStarted, OnHold, Completed, Not Completed), with each value separated by a new line" and enter values as shown below.
6. Click Next >> Next >> Next >> Save .

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The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Customer Order'. On the left, a sidebar lists various setup options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The central panel displays the 'Custom Field Definition Detail' for 'Order Status'. Key details shown include:

Field Label	Order Status	Object Name	Customer Order
Field Name	Order_Status	Data Type	Picklist
API Name	Order_Status_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	victorjoy.chokka, 6/4/2025, 2:22 AM	Modified By	victorjoy.chokka, 6/4/2025, 2:22 AM

Creating Lookup Relationship

1. Go to the setup page >> click on object manager >> type object name (Billing) in the quick find bar >> click on the object
2. Click on fields & relationship >> click on New.
3. Select "Lookup relationship" as data type and click Next.
4. Select the related object "Item".
5. Give Field Label as "Item" and click Next.
6. Next >> Next >> Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Billing'. The left sidebar lists various setup options. The central panel displays the 'Custom Field Definition Detail' for 'Item'. Key details shown include:

Field Label	Item	Object Name	Billing
Field Name	Item	Data Type	Lookup
API Name	Item_c		

Creating Formula Field in Billing Object

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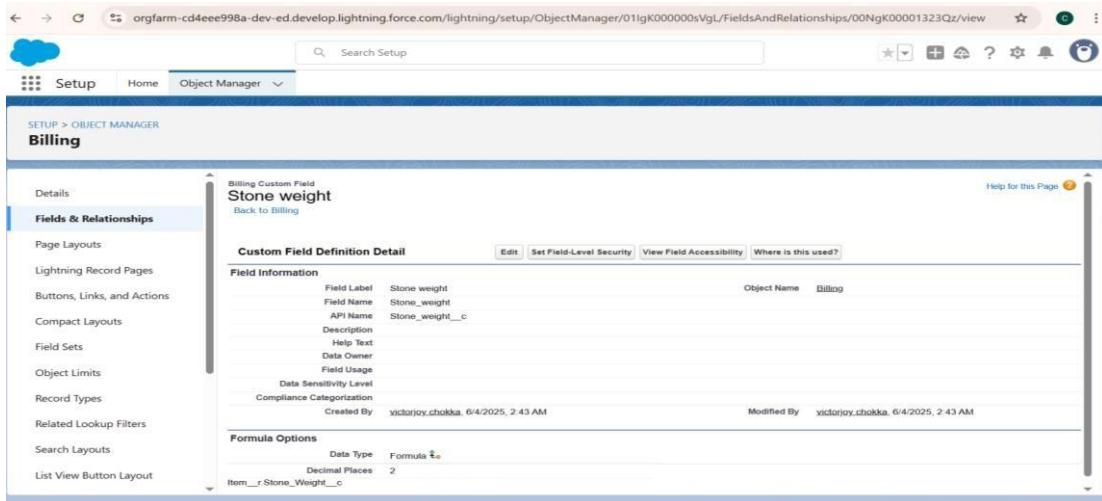
1. Go to setup >> click on Object Manager >> type object name (Billing) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Ornament" and select formula return type as "Text" and click next.
5. Under Advanced Formula write down the formula : Item__r.Ornament__c 6. Click "Check Syntax" and Next >> Next >> Save & New.

The screenshot shows the Salesforce Setup interface for creating a custom field. The URL in the browser is <https://orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK00000sVgL/FieldsAndRelationships/00NgK0000131sYo/view>. The page title is "Custom Field Definition Detail" for the Billing object. The left sidebar shows navigation options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area displays the "Ornament" custom field definition with its details: Field Label: Ornament, Field Name: Ornament, API Name: Ornament__c, Description: Help Text, and Advanced Formula: Item__r.Ornament__c. The "Object Name" is Billing. The "Created By" is victorjoy.chokka, and the "Modified By" is victorjoy.chokka. The "Data Type" is Formula.

Creating Formula Field in Billing Object

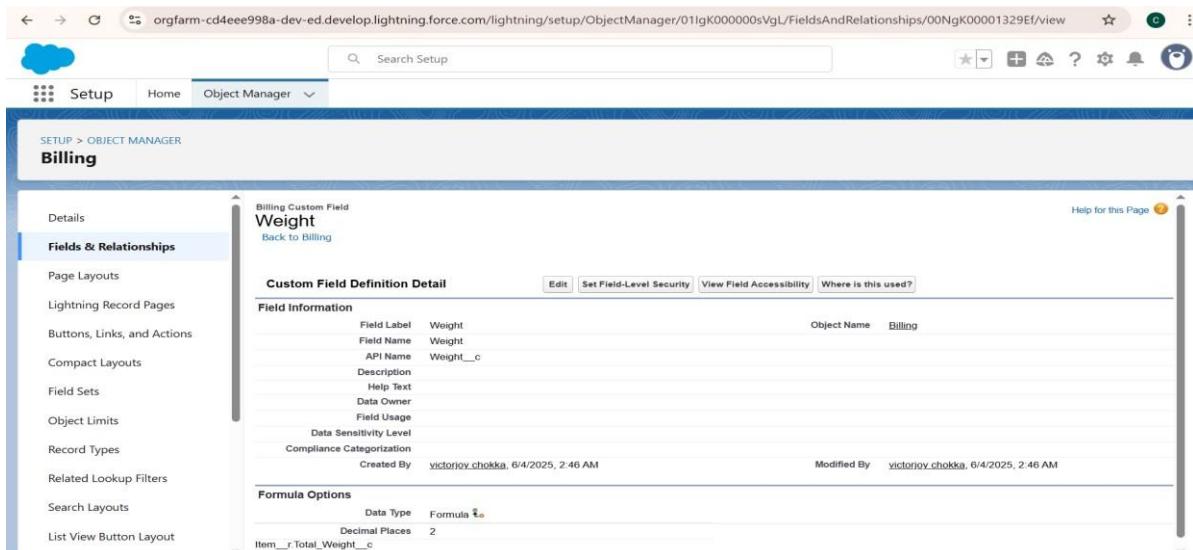
1. Go to setup >> click on Object Manager >> type object name (Billing) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Stone weight" and select formula return type as "Number" and Decimal as "2" and click next.
5. Under Advanced Formula write down the formula : Item__r.Stone_weight__c
6. Click "Check Syntax" and Next >> Next >> Save & New.

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Creating Formula Field in Billing Object

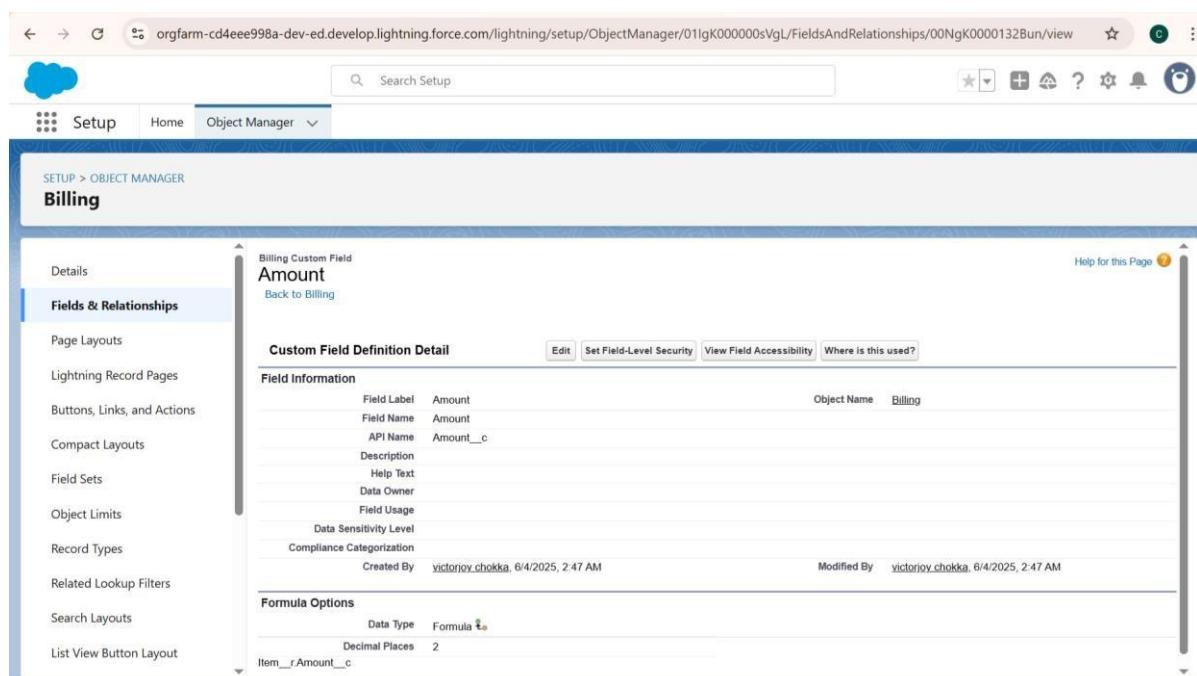
1. Go to setup >> click on Object Manager >> type object name (Billing) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Weight" and select formula return type as "Number" and Decimal as " 2 " and click next.
5. Under Advanced Formula write down the formula : Item__r.Total_weight__c
6. click "Check Syntax" and Next >> Next >> Save & New.



Creating Formula Field in Billing Object

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1. Go to setup >> click on Object Manager >> type object name (Billing) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Amount" and select formula return type as "Currency" and Decimal as " 2 " and click next.
5. Under Advanced Formula write down the formula : Item__r.Amount__c
6. click "Check Syntax" and Next >> Next >> Save & New.



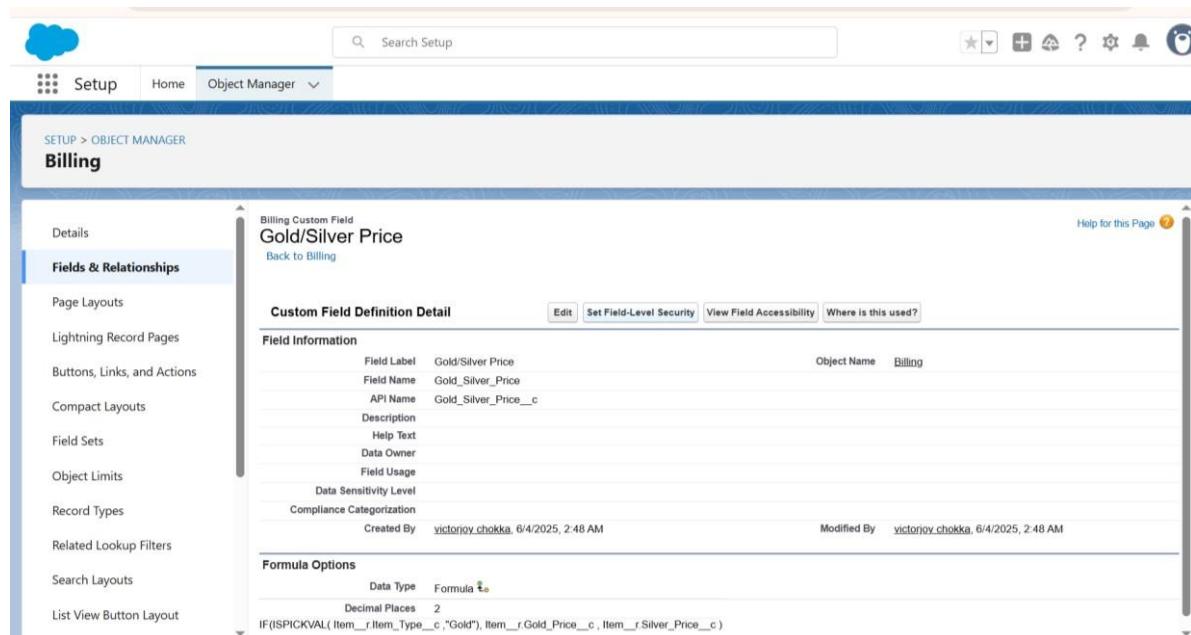
Creating Formula Field in Billing Object

1. Go to setup >> click on Object Manager >> type object name (Billing) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Gold/Silver Price" and select formula return type as "Currency" and Decimal as " 2 " and click next.
5. Under Advanced Formula write down the formula :

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```
IF(ISPICKVAL( Item__r.Item_Type__c , "Gold"), Item__r.Gold_Price__c , Item__r.Silver_Price__c )
```

6. click “Check Syntax” and Next >> Next >> Save & New.



Creating Formula Field in Billing Object

1. Go to setup >> click on Object Manager >> type object name (Billing) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select Data type as “Formula” and click Next.
4. Give Field Label and Field Name as “KDM Charge” and select formula return type as “Currency” and Decimal as “0” and click next.
5. Under Advanced Formula write down the formula : Item__r.KDM__c
6. Click “Check Syntax” and Next >> Next >> Save & New.

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The screenshot shows the Salesforce setup interface under 'Object Manager'. A custom field named 'KDM Charge' is being created for the 'Billing' object. The 'Field Information' section shows the following details:

Field Label	KDM Charge	Object Name	Billing
Field Name	KDM_Charge		
API Name	KDM_Charge__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	victorjoy.chokka, 6/4/2025, 2:49 AM	Modified By	victorjoy.chokka, 6/4/2025, 2:49 AM
Formula	Billing Custom Field: KDM Charge ~ Salesforce - Developer Edition		
Data Type	Formula		
Decimal Places	0		

Creating Formula Field in Billing Object

1. Go to setup >> click on Object Manager >> type object name (Billing) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Making Charges" and select formula return type as "Currency" and Decimal as " 2 " and click next.
5. Under Advanced Formula write down the formula : Item__r.Making_Charges__c
6. Click "Check Syntax" and Next >> Next >> Save & New.

The screenshot shows the Salesforce setup interface under 'Object Manager'. A custom field named 'Making Charges' is being created for the 'Billing' object. The 'Field Information' section shows the following details:

Field Label	Making Charges	Object Name	Billing
Field Name	Making_Charges		
API Name	Making_Charges__c		
Description			
Help Text			
Data Owner			
Billing Custom Field: Making Charges ~ Salesforce - Developer Edition			
Data Sensitivity Level			
Compliance Categorization			
Created By	victorjoy.chokka, 6/4/2025, 2:51 AM	Modified By	victorjoy.chokka, 6/4/2025, 2:51 AM
Formula Options			
Data Type	Formula		
Decimal Places	2		

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Creating Formula Field in Billing Object

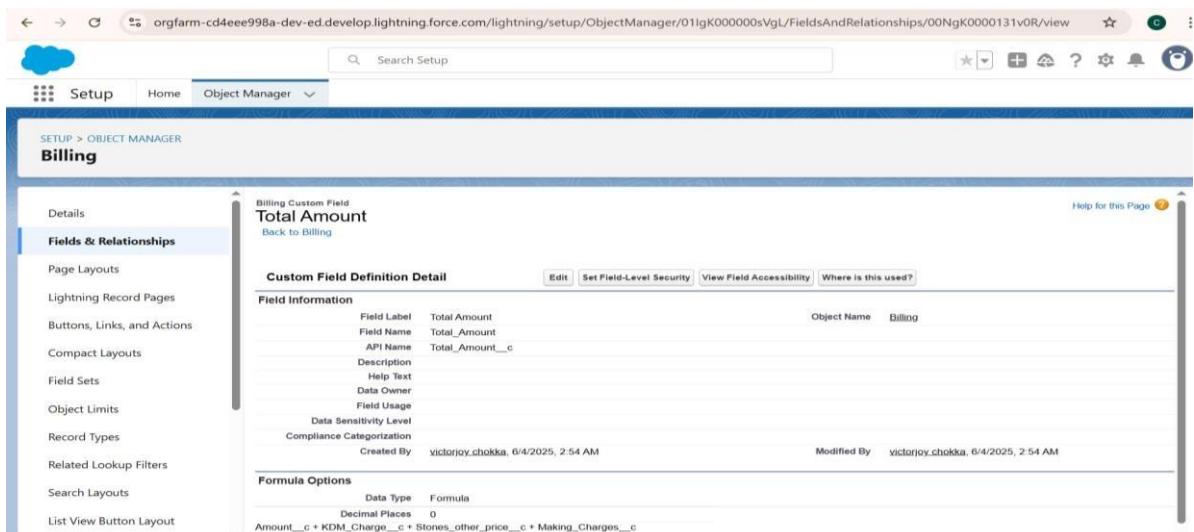
1. Go to setup >> click on Object Manager >> type object name (Billing) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Stones/other price" and select formula return type as "Currency" and Decimal as " 2 " and click next.
5. Under Advanced Formula write down the formula : Item__r.Stone_other_price__c
6. click "Check Syntax" and Next >> Next >> Save & New.

The screenshot shows the Salesforce Object Manager interface. The left sidebar menu is visible with options like Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area displays a custom field named 'Stones/other price' for the 'Billing' object. The 'Custom Field Definition Detail' section includes fields for Field Label ('Stones/other price'), Field Name ('Stones_other_price'), API Name ('Stones_other_price__c'), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By ('victorjoy.chokka, 6/4/2025, 2:53 AM'), Modified By ('victorjoy.chokka, 6/4/2025, 2:53 AM'), and a formula definition. The formula is defined as 'Item__r.Stone_other_price__c'. The 'Data Type' is set to 'Formula' with 'Decimal Places' set to '2'.

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Creating Formula Field in Billing Object

1. Go to setup >> click on Object Manager >> type object name (Billing) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Total Amount" and select formula return type as "Currency" and Decimal as " 0 " and click next
5. Under Advanced Formula write down the formula : Amount_c + KDM_Charge_c + Stones_other_price_c + Making_Charges_c
6. click "Check Syntax" and Next >> Next >> Save & New.



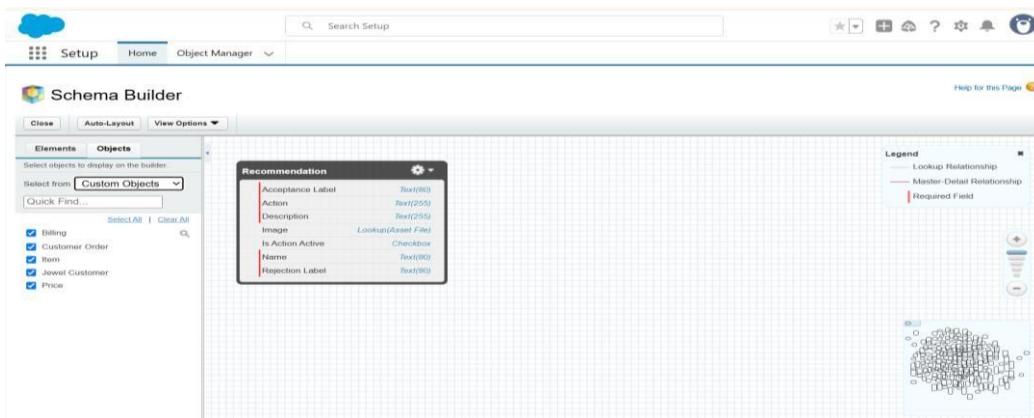
Schema Builder

Schema Builder is a powerful tool within Salesforce that allows you to visualise, explore, and design the relationships between objects in your Salesforce organisation. It provides a graphical representation of the data model, making it easier to understand the structure and connections between different objects.

Creating Schema Builder

1. Go to setup >> click on Object Manager >> Schema Builder.
2. Select objects >> Enter Objects as "Jewel Customer,Item,Customer Order, Price, Billing objects" in quick box and select them.

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Creating the Field Dependencies

Use case:

Field Dependencies are used to create relationships between fields within an object. They allow you to control the visibility and availability of fields based on the values selected in other fields.

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar >>click on the object.
2. Click on Fields & Relationships and click on the Priority field.
3. Search for Field Dependencies and click on New.
4. Select Controlling Field as "Priority" and Depending field as "Expected Days of Return"? Continue.
5. Select the "Expected Days of Return" values of related Priority values and Click on Include Values >> Save.

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The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'FIELDS & RELATIONSHIPS' and lists various options like Page Layouts, Lightning Record Pages, Buttons, etc. The main content area is titled 'Priority' under 'Item Custom Field'. It shows the 'Custom Field Definition Detail' page with tabs for Edit, Set Field-Level Security, View Field Accessibility, and Where is this used?. The 'Field Information' section includes details such as Field Label: Priority, Field Name: Priority, API Name: Priority__c, Description: Help Text, Data Owner: Data Usage, Data Sensitivity Level: Compliance Categorization, Created By: victorjoy.chokka, 6/3/2025, 11:41 PM, and Modified By: victorjoy.chokka, 6/3/2025, 11:41 PM. The 'General Options' section shows Required checked and Default Value as [New]. The 'Picklist Options' section has Restriction Rules checked, with Controlling Field set to [New]. The 'Picklist Values Used' section shows 4 active and inactive picklist values. The 'Field Dependencies' section lists an action for 'Expected Days Of Return' with Data Type Picklist and Modified By victorjoy.chokka, 6/4/2025, 3:10 AM. The 'Validation Rules' section is currently empty.

Creating the validation rule :

Creating the validation rule for Postal Code field in Jewel Customer object Note

: check whether the fields mentioned in the formula field are created or not , if not go to activity 10 and create those fields mentioned in Jewel Customer object.

1. Go to setup >> click on Object Manager >> type object name (Jewel Customer) in quick find bar >> click on the object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as "Postal Code ".
4. Insert the Error Condition Formula as :-

AND(

OR(

```
LEN( Zip_Postal_code__c ) <> 6,  
NOT(REGEX(Zip_Postal_code__c, "^[0-9]{6}$"))  
,  
NOT(ISBLANK(Zip_Postal_code__c))
```

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-)
5. Enter the Error Message as "Must contain 6 digits", select the Error location as Field and select the field as "Zip/Postal code", and click Save.

The screenshot shows the Salesforce Object Manager interface for the 'Jewel Customer' object. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area displays a validation rule named 'Postal_Code'. The validation formula is:

```
AND(
    OR(
        LEN(Zip_Postal_code__c) <> 6,
        NOT(REGEX(Zip_Postal_code__c, "[0-9]{6}"))
    ),
    NOT(ISBLANK(Zip_Postal_code__c))
)
```

The error message is 'Must contain 6 digits' and the error location is 'Zip/Postal code'. The rule was created by 'victorjoy.chokka' on 6/4/2025, 3:13 AM.

NOTE:

Create One more Validation rule for Jewel Customer object.

1. Enter Rule name as "ValidationRule For JewelCustomerObject".
2. Insert the Error Condition Formula as :-

```
OR( ISBLANK( City__c ), ISBLANK( Country__c ), ISBLANK( Phone__c ), ISBLANK( State__c ), ISBLANK( Street__c ) )
```
3. Enter the Error Message as "Please fill Required fields", select the Error location as Top of Page and click Save.

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The screenshot shows the Salesforce Object Manager interface for the 'Jewel Customer' object. On the left, a sidebar lists various setup options like Object Limits, Record Types, and Validation Rules. The 'Validation Rules' option is selected. The main content area displays the 'Jewel Customer Validation Rule' detail page. The rule is named 'ValidationRule_For_JewelCustomerObject' and is active. The error condition formula is set to 'OR(ISBLANK(City__c), ISBLANK(Country__c), ISBLANK(Phone__c), ISBLANK(State__c), ISBLANK(Street__c))'. The error message is 'Please fill Required fields'. The created by user is 'victorjoy_chokka' and the modified by user is also 'victorjoy_chokka'. The error location is specified as 'Top of Page'. There are 'Edit' and 'Clone' buttons at the top right of the detail page.

Create Validation rule for Item object.

1. Enter Rule name as "ValidationRule For Item".
2. Insert the Error Condition Formula as :-

```
OR( ISBLANK( Amount_c ) ,  
ISBLANK( Customer_Name_c ),ISBLANK(  
Gold_price_c ),ISBLANK( KDM_c ),ISBLANK(  
Ornament_c ),ISBLANK( Percentage_c  
,ISBLANK( Making_Charges_c ),ISBLANK(  
Prices_c ),ISBLANK( Stone_weight_c  
,ISBLANK( Silver_price_c ),ISBLANK(  
Stone_other_price_c ),ISBLANK(  
Stone_weight_c ),ISBLANK( Weight_c ))
```

3. Enter the Error Message as "Please fill Required fields", select the Error location as Top of Page and click Save.

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The screenshot shows the Salesforce Setup interface for managing validation rules. The URL is orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IgK000000sVTR/ValidationRules/03dgK000000AeYrQAK/view. The page title is "Item Validation Rule". The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the "Validation Rule Detail" for "ValidationRule_for_Item". The rule is active and has the following details:

Field	Value
Rule Name	ValidationRule_for_Item
Error Condition Formula	OR(ISBLANK(Amount__c), ISBLANK(Customer_Name__c), ISBLANK(Gold_Price__c), ISBLANK(KDM__c), ISBLANK(Ornament__c), ISBLANK(Making_Charges__c), ISBLANK(Prices__c), ISBLANK(Stone_Weight__c), ISBLANK(Silver_Price__c), ISBLANK(Stone_Other_Price__c), ISBLANK(Stone_Weight__c), ISBLANK(Weight__c))
Error Message	Please fill Required fields
Description	victorjoy_chokka, 6/4/2025, 3:18 AM
Created By	victorjoy_chokka
Modified By	victorjoy_chokka
Modified Date	6/4/2025, 3:18 AM

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Profiles

Gold Smith Profile

To create a new profile:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (System Administrator) >> enter profile name (Gold Smith) >>

Save.

2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Jewel Customer, Item, Customer Order, Prices, Billings .
4. Scroll down and Click on Save.

The screenshot shows the Salesforce Setup interface for managing profiles. The URL in the browser is orgfarm-cd4eee998a-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egK000002O0Yn. The page title is "Profiles". A sub-header says "Profile Gold Smith". The main content area displays the profile details for "Gold Smith", including its name, user license (Salesforce), and creation date (6/4/2025, 3:20 AM). It also shows the "Custom Profile" checkbox is checked. Below this, the "Page Layouts" section lists standard object layouts for Global, Email Application, and Home Page Layout, along with their respective global layouts and location group assignments. At the bottom right of the page, there is a "Help for this Page" link.

Worker Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Salesforce Platform User) >> enter profile name (Worker) >> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Items,

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Price and Customer Order objects.

4. Scroll down and Click on Save.

The screenshot shows the Salesforce Setup interface for managing profiles. The URL is orgfarm-cd4eee998a-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egK000002O0It. The left sidebar has 'Setup' selected. The main area is titled 'Profiles' and shows the 'Worker' profile. It includes sections for 'Profile Detail' (Name: Worker, User License: Salesforce Platform, Description: null, Created By: victorjoy_chokka, 6/4/2025, 3:30 AM), 'Page Layouts' (Standard Object Layouts: Global - Global Layout [View Assignment], Email Application - Not Assigned [View Assignment], Home Page Layout - Home Page Default [View Assignment]; Lead - Lead Layout [View Assignment], Location - Location Layout [View Assignment], Location Group - Location Group Layout [View Assignment]), and a 'Custom Profile' checkbox which is checked. Buttons at the top right include 'Edit', 'Clone', 'Delete', and 'View Users'.

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Roles

Creating Gold Smith Role

1. From setup >> Go to quick find >> Search for Roles >> click on set up roles.
2. Click on Expand All and click on add role under whom this role works.
3. Give Label as "Gold Smith" and Role name gets auto populated. Check to whom this role (Gold Smith) reports. Then click on Save.

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The screenshot shows the Salesforce Setup Roles page. On the left, there's a sidebar with various setup links like Setup Home, Service Setup Assistant, etc. The main area displays the 'Role' details for 'Gold Smith'. It shows the role name 'Gold Smith', a label 'Gold Smith', and a note that it reports to 'None'. There are sections for Opportunity Access and Case Access. Below this, a table lists 'Users in Gold Smith Role' with one entry: 'Niklaus Mikaelson' (alias nmika, username nikalus@mikaelson.com). A link 'Assign Users to Role' is also visible.

Note:

Create one more role as Worker which reports to Gold Smith.

1. From setup >> Go to quick find >> Search for Roles >> click on set up roles.
2. Click on Expand All and click on add role under whom this role works.
3. Give Label as "Worker" and Role name gets auto populated. Check to whom this role () reports. Then click on Save.

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The screenshot shows the Salesforce Setup Roles page for the 'Worker' role. The 'Role Detail' section displays the following information:

Label	Worker	Role Name	Worker
This role reports to	Gold_Smith	Role Name as displayed on reports	
Modified By	victorjoy_chokka, 6/4/2025, 3:34 AM	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

The 'Users in Worker Role' section lists two users:

Action	Full Name	Alias	Username	Active
Edit	Kol Mikaelson	knika	kol@mikaelson.com	✓
Edit	Akkala Harathi	ahara	akkala@harathi.com	✓

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Users

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 : Gold Smith
 8. User licence : Salesforce
 9. Profiles : Gold Smith
10. Save.

The screenshot shows the Salesforce Setup interface. The left sidebar navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. Under 'User Management Settings', the 'Users' section is selected. The main content area displays a 'User Detail' page for 'Niklaus Mikaelson'. The 'User Detail' table contains the following information:

Name	Niklaus Mikaelson	Role	Gold Smith
Alias	nmika	User License	Salesforce
Email	cvcitorjoy004@gmail.com [Verify]	Profile	Gold Smith
Username	nikalus@mikaelson.com	Active	<input checked="" type="checkbox"/>
Nickname	nikumike	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	Edit

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Create User

1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
 - First Name : Kol
 - Last Name : Mikaelson
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: text@text.text
 - Nick Name : Give a Nickname
 - Role : Worker
 - User licence : Salesforce Platform
 - Profiles : Worker
3. Save.

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar is collapsed, and the main area displays the 'Users' page under the 'User Management Settings' category. A search bar at the top right contains the text 'Search Setup'. The main content area shows a user record for 'Kol Mikaelson' with the following details:

User Detail		Role	
Name	Kol Mikaelson	User License	Salesforce Platform
Alias	kmika	Profile	Worker
Email	cvcitorjoy004@gmail.com [Verify]	Active	<input checked="" type="checkbox"/>
Username	kol@mikaelson.com	Marketing User	<input type="checkbox"/>
Nickname	mikael	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address		Site.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	WDC User	<input type="checkbox"/>
Locale	English (United States)	Mobile Push Registrations	<input type="checkbox"/>
Language	English	Data.com User Type	<input type="checkbox"/>
Delegated Approver			

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Note: Create One more users as mentioned in activity 2 using the same profile.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main panel displays the 'User Detail' for a user named 'Akkala Harathi'. The user's name is listed as 'Akkala Harathi' with an alias 'ahara'. The email address is 'cvictorjoy004@gmail.com' with a verify link. The username is 'akkala@harathi.com' and the nickname is 'harathi'. The role is set to 'Worker' and the user license is 'Salesforce Platform'. The profile is 'Worker' and the active status is checked. Other settings include Marketing User (unchecked), Offline User (unchecked), Knowledge User (unchecked), Flow User (unchecked), Service Cloud User (unchecked), Site.com Contributor User (unchecked), Site.com Publisher User (unchecked), WDC User (unchecked), Mobile Push Registrations (View), and Data.com User Type (Data.com User). The left sidebar shows various setup categories like Permission Set Groups, Profiles, Public Groups, Roles, and User Management Settings, with 'Users' also being selected.

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Page Layouts

To Create a Gold Page layout

1. Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.
2. Click on Page layout >> Click on New.
3. Give Page layout Name as "Page Layout for Gold" and click on Save.
4. Arrange the field as shown in the Information Section ,remove fields which are related to Silver and click Ok.
5. Click Save.
6. Make sure your page layout looks like the picture above.

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The screenshot shows the Salesforce Setup interface for the Item object. The left sidebar has 'Page Layouts' selected. The main area displays the 'Page Layout for Gold' configuration. It includes a 'Fields' section with various fields like Customer Name, Item Type, Ornament, Priority, and Silver Price. There's also a 'Highlights Panel' and a 'Quick Actions in the Salesforce Classic Publisher' section.

To Create a Silver Page layout

1. Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.
2. Click on Page layout >> Click on New.
3. Give Page layout Name as "Page Layout for Silver" and click on Save.
4. Arrange the field as shown in the Information Section ,remove fields which are related to Gold and click Ok.

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The screenshot shows the Salesforce Object Manager interface for the 'Item' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The 'Page Layouts' option is selected. The main area displays the 'Page Layout for Silver' configuration. It includes a toolbar with Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. A 'Fields' section lists Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, Report Charts, and a 'Section' item. A 'Customer Name' field is highlighted. Other fields shown include Item Type, Ornament, Priority, Silver Price, Weight, Expected Days Of ..., KDM, Owner, Purity, Stone/Other Price, Amount, Gold Price, Last Modified By, Percentage, Purity Gold Price, Stone Weight, Created By, Item Id, Making Charges, Prices, Record Type, and Total Weight. Below the fields is an 'Item Sample' section and a 'Highlights Panel' for customization. A note about Publisher actions is also present.

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Record Types

To create a Record Type

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Click on the Record Types >> click New.
3. Select Existing Record as "Master", Record type Label as "Gold", Description as "Gold items information".

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4. Uncheck for "Make Available".
5. Scroll down and check for the Gold Smith, Worker & System Administrator profile and click on Next.
6. Select "Apply a different layout for each profile", and change page layout to "Page Layout for Gold" for Gold Smith, Worker and System Administrator >> save & new.

The screenshot shows the Salesforce Setup Object Manager interface. The left sidebar has a 'Record Types' section selected. The main content area displays the 'Gold' record type details. The 'Edit' button is visible above the table. The table contains the following data:

Field	Value	Modified Date
Record Type Label	Gold	6/4/2025, 9:37 PM
Record Type Name	Gold	6/4/2025, 9:37 PM
Namespace Prefix		6/4/2025, 9:37 PM
Description	Gold items information	6/4/2025, 9:37 PM
Created By	victorjoy.chokka, 6/4/2025, 9:37 PM	6/4/2025, 9:37 PM
Modified By	victorjoy.chokka, 6/4/2025, 9:37 PM	

Below the table, there is a 'Picklists Available for Editing' section with three entries:

Action	Field	Modified Date
Edit	Expected Days Of Return	6/4/2025, 9:37 PM
Edit	Item Type	6/4/2025, 9:37 PM
Edit	Priority	6/4/2025, 9:37 PM

Note:

Create another Record Type with name "Silver" following the steps from Activity1
(Use page layout for Silver).

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The screenshot shows the Salesforce Object Manager interface. The left sidebar has a 'Record Types' section selected, listing various options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the properties of the 'Silver' record type under the 'Item' object. The record type label is 'Silver', and it is active. The description is 'Silver items information'. It was created by 'victorjoy_chokka' on 6/4/2025, 9:37 PM, and modified by the same user at the same time. A table titled 'Picklists Available for Editing' lists three fields: 'Expected Days Of Return', 'Item Type', and 'Priority', all of which were last modified on 6/4/2025, 9:37 PM.

Action	Field	Modified Date
Edit	Expected Days Of Return	6/4/2025, 9:37 PM
Edit	Item Type	6/4/2025, 9:37 PM
Edit	Priority	6/4/2025, 9:37 PM

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Permission Sets

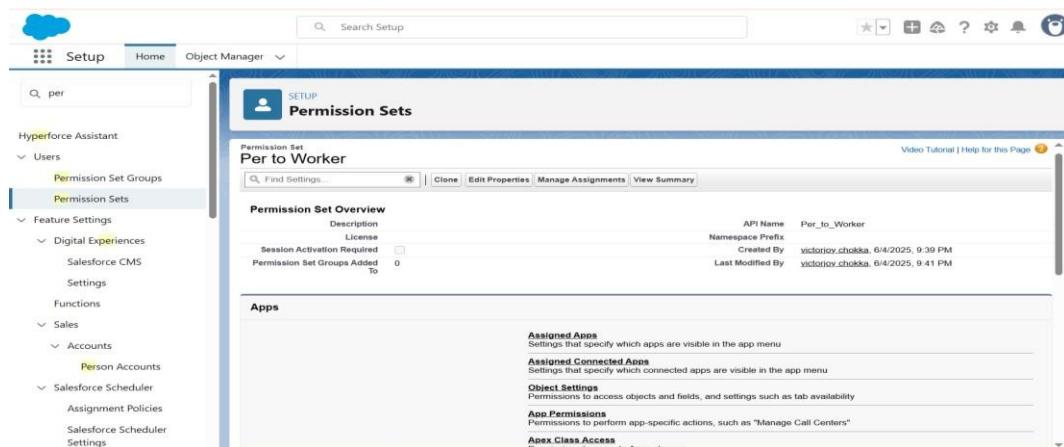
Creating permission set

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without

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changing their profiles. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets.

1. Go to setup >> type "permission sets" in quick search >> select permission sets >> New.
2. Enter the label name as "Per to Worker", API will be auto populated >> save.
3. Under Apps Select object settings.
4. Click on Items object >> click on Edit >> under Item: Record Type Assignments, enable Gold, Silver >> Object permission check for read ,edit 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 Worker profile and click on Next >> Assign >> Done.



Trigger

NOTE : create "Paid Amount", "Paying Amount " fields before create trigger.

Creating Currency(Paid Amount) Field in Billing Object

To create fields in an object:

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1. Go to setup >> click on Object Manager >> type object name (Billing) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Currency" and click Next.
4. Enter Field Label as " Paid Amount" and length as " 18 "and decimal" 0 ".Field name will be auto generated.
5. Click Next >> Next >> Next >> Save .

Creating Formula(Paying Amount) Field in Billing Object

1. Go to setup >> click on Object Manager >> type object name (Billing) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Paying Amount" and select formula return type as "Currency" and Decimal as " 2 " and click next.
5. Under Advanced Formula write down the formula : Total_Amount_c - Paid_Amount_c
6. click "Check Syntax" and Next >> Next >> Save & New.

Create a Trigger Handler class

Trigger handler:

A trigger handler is a design pattern that organises trigger logic into separate classes. This helps in keeping code organised, reusable, and easier to maintain. The trigger handler class contains methods that handle the specific logic for different trigger events, improving code structure and readability. This approach is particularly useful

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for complex triggers or projects with multiple triggers, as it promotes modular coding practices and reduces the chances of code duplication.

1. Click the Gear icon >> click on Developer Console >> File >> New >> Apex class.
2. Give name for your new Apex class as "UpdatePaidAmountTriggerHandler >>"ok".
3. Paste the code given below.

CODE:

```
public class UpdatePaidAmountTriggerHandler {    public static void
handleBeforeInsert(List<Billing__c> newBillings) {        for (Billing__c
billing : newBillings) {            billing.Paid_Amount__c =
billing.Paying_Amount__c;
}
}

public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap,
List<Billing__c> updatedBillings) {        for (Billing__c billing : updatedBillings) {
Billing__c oldBilling = oldBillingsMap.get(billing.Id);        Decimal
oldPaidAmount = oldBilling.Paid_Amount__c;        billing.Paid_Amount__c
= oldPaidAmount + billing.Paying_Amount__c;
}
}
}
```

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```

1 * public class UpdatePaidAmountTriggerHandler {
2
3     public static void handleBeforeInsert(List<Billing__c> newBillings) {
4
5         for (Billing__c billing : newBillings) {
6             billing.
7         }
8     }
9
10    public static void handleBeforeUpdate(Map<Id, Billing__c> updatedBillings) {
11
12        for (Billing__c oldBilling : updatedBillings.values()) {
13            Billing__c oldBilling = oldBillingsMap.get(billing.Id);
14
15            Decimal oldPaidAmount = oldBilling.Paid_Amount__c;
16
17            billing.Paid_Amount__c = oldPaidAmount + billing.Paying_Amount__c;
18
19        }
20
21    }
22
23
24}

```

Create the trigger :

1. Click the Gear icon >> click on Developer Console >> File>>New >>Apex Trigger.
2. Give name for your new Apex class as "UpdatePaidAmountTrigger >>"ok".
3. Paste the code given below.

CODE:

```

trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {
    if (Trigger.isInsert) {
        UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);
    } else if (Trigger.isUpdate) {
        UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap,
Trigger.new);
    }
}

```

```

1 * trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {
2
3     if (Trigger.isInsert) {
4
5         UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);
6
7     } else if (Trigger.isUpdate) {
8
9         UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap,
Trigger.new);
10
11    }
12
13}

```

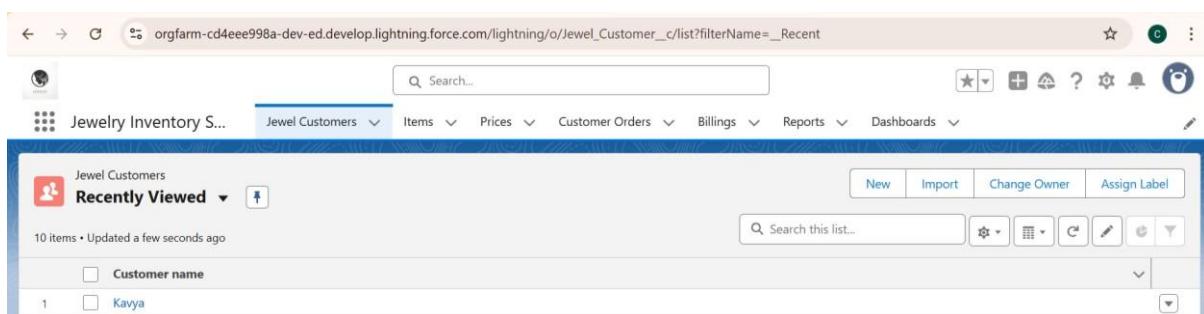
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User Adoption

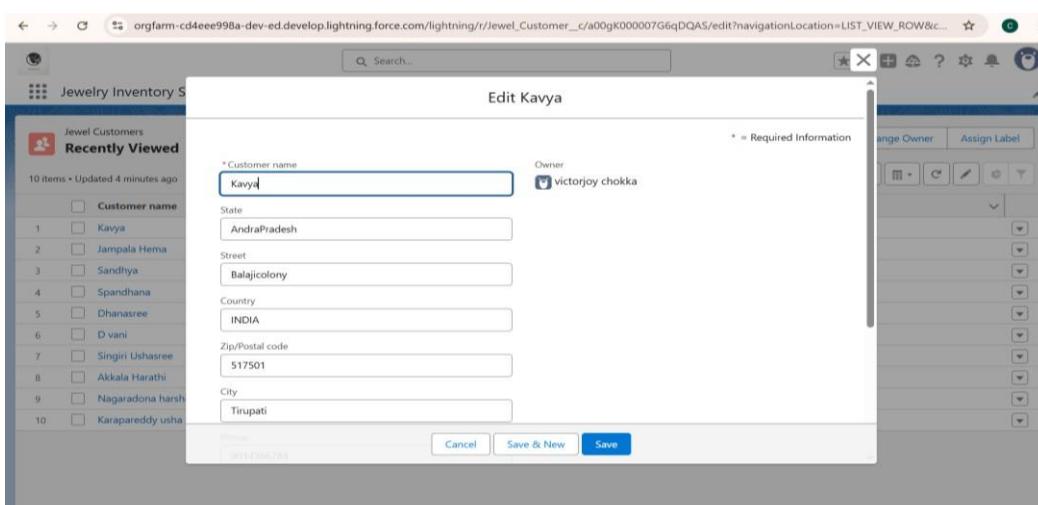
Create a Record (Jewel Customer)

1. Click on App Launcher on the left side of the screen.
2. Search Jewelry Inventory System & click on it.
3. Click on Drop Down and Click on the Jewel Customer tab.
4. Click New.
5. Fill the Details and click on Save.



View a Record (Jewel Customer)

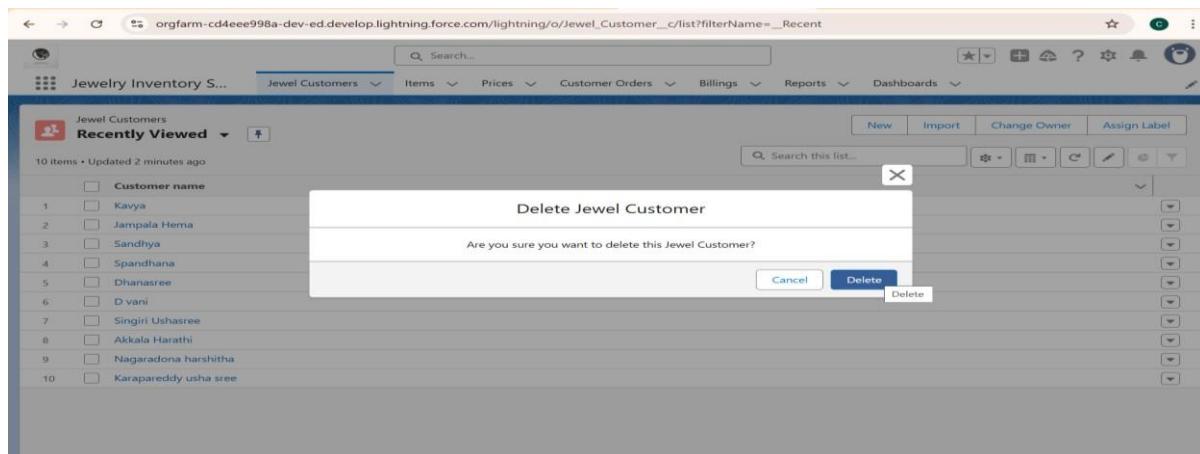
1. Click on App Launcher on the left side of the screen.
2. Search Jewelry Inventory System & click on it.
3. Click on the Jewel Customer Tab.
4. Click on any record name. you can see the details of the Jewel Customer.



Delete a Record (Jewel Customer)

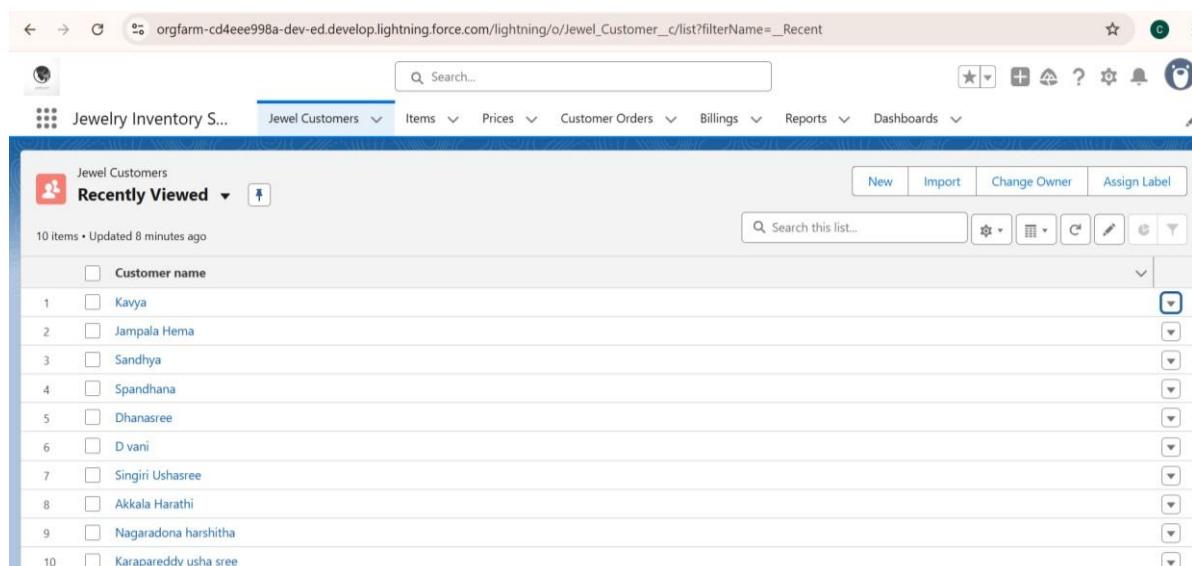
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1. Click on App Launcher on the left side of the screen.
2. Search Jewelry Inventory System & click on it.
3. Click on the Jewel Customer Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete.



Note:

Create at least 10 records for each of the objects: Jewel Customer ,Price ,Item, Customer Order and Billing.



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The screenshot shows the CRM application interface for managing jewel items. The top navigation bar includes links for Jewelry Inventory S..., Jewel Customers, Items, Prices, Customer Orders, Billings, Reports, and Dashboards. The 'Items' tab is selected. A sidebar on the left lists categories: 'Recently Viewed' (selected), 'Items' (selected), 'Prices', 'Customer Orders', 'Billings', 'Reports', and 'Dashboards'. The main content area displays a list titled 'Recently Viewed' with 10 items, each with a checkbox and a dropdown menu. The items are numbered 1 through 10 and labeled 'Item-01' through 'Item-10'. A search bar at the top right allows searching within the list.

The screenshot shows the CRM application interface for managing jewel prices. The top navigation bar includes links for Jewelry Inventory S..., Jewel Customers, Items, Prices, Customer Orders, Billings, Reports, and Dashboards. The 'Prices' tab is selected. A sidebar on the left lists categories: 'Recently Viewed' (selected), 'Items' (selected), 'Prices' (selected), 'Customer Orders', 'Billings', 'Reports', and 'Dashboards'. The main content area displays a list titled 'Recently Viewed' with 10 items, each with a checkbox and a dropdown menu. The items are numbered 1 through 10 and labeled 'Dhanasree' through 'Nagaradona harshitha'. A search bar at the top right allows searching within the list.

CRM Application For Jewel Management

The screenshot shows the 'Customer Orders' page in a web browser. The URL is https://orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/o/Customer_Order__c/list?filterName=_Recent. The page title is 'Customer Orders'. The top navigation bar includes links for 'Jewelry Inventory S...', 'Jewel Customers', 'Items', 'Prices', 'Customer Orders' (which is highlighted in blue), 'Billings', 'Reports', and 'Dashboards'. A search bar at the top right contains the placeholder 'Search...'. Below the navigation is a section titled 'Recently Viewed' with a dropdown arrow. It displays a list of 10 recent customer orders, each with a checkbox and a link: 1. Order - 0010, 2. Order - 0009, 3. Order - 0008, 4. Order - 0007, 5. Order - 0006, 6. Order - 0005, 7. Order - 0004, 8. Order - 0003, 9. Order - 0002, 10. Order - 0001. To the right of the list are several icons for actions like 'New', 'Import', 'Assign Label', and search/filter.

The screenshot shows the 'Billings' page in a web browser. The URL is https://orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/o/Billing__c/list?filterName=_Recent. The page title is 'Billings'. The top navigation bar includes links for 'Jewelry Inventory S...', 'Jewel Customers', 'Items', 'Prices', 'Customer Orders', 'Billings' (which is highlighted in blue), 'Reports', and 'Dashboards'. A search bar at the top right contains the placeholder 'Search...'. Below the navigation is a section titled 'Recently Viewed' with a dropdown arrow. It displays a list of 10 recent billings, each with a checkbox and a link: 1. Nagaradona harshitha, 2. Singiri Ushasree, 3. Karapareddy usha sree, 4. Dhanasree, 5. D vani, 6. Sandhya, 7. Jampala Hema, 8. Nagaradona harshitha, 9. Kavya, 10. Akkala Harathi. To the right of the list are several icons for actions like 'New', 'Import', 'Change Owner', 'Assign Label', and search/filter.

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Reports

CRM Application For Jewel Management

Create Report

1. Go to the app >> click on the reports tab.
2. Click New Report.
3. Select report type (Item with Prices) from category or from report type panel or from search panel >> click on start report.
4. Customise your report
 - Add fields from the left pane as shown below.
5. Save or run it.

The screenshot shows the Salesforce Lightning interface for creating a report. The top navigation bar includes links for Jewel Customers, Items, Prices, Customer Orders, Billings, Reports, and Dashboards. The current page is 'REPORTS' under 'New Items with Prices Report'. The 'Fields' pane on the left lists 'Groups' (with 'GROUP ROWS' and 'Add group...') and 'Columns' (with 'Item: Item Id', 'Prices: Item Price', '# Prices: Gold Price', and '# Prices: Silver Price'). The main preview area shows a table with 11 rows of data:

	Item: Item Id	Prices: Item Price	Prices: Gold Price	Prices: Silver Price
1	Item-04	Nagaradona harshitha	\$10,000.00000	\$15,000.00000
2	Item-10	Nagaradona harshitha	\$10,000.00000	\$15,000.00000
3	Item-01	Kavya	\$1,000.00000	\$2,000.00000
4	Item-09	Singiri Ushasree	\$10,000.00000	\$20,000.00000
5	Item-02	Jampala Hema	\$5,000.00000	\$15,000.00000
6	Item-03	Sandhya	\$7,000.00000	\$3,000.00000
7	Item-08	Karapareddy usha sree	\$5,000.00000	\$20,000.00000
8	Item-05	Akkala Harathi	\$10,000.00000	\$35,000.00000
9	Item-06	D vani	\$5,000.00000	\$4,000.00000
10	Item-07	Dhanasree	\$800.00000	\$2,000.00000
11			\$53,800.00000	\$116,000.00000

Reports

1. Go to the app >> click on the reports tab.
2. Click New Report.
3. Select report type (Billing with Item) from category or from report type panel or from search panel >> click on start report.
4. Customise your report
 - Add fields from the left pane as shown below.
5. Save or run it.

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New Billings with Item Report

	Gold/Silver Price
1	\$1,000.00
2	\$15.00
3	\$100.00
4	\$1,000.00
5	\$15.00
6	\$700.00
7	\$500.00
8	\$1,000.00
9	\$4.00
10	\$2.00
11	\$4,336.00

1. Go to the app >> click on the reports tab.
2. Click New Report.
3. Select report type (Item with Customer Orders) from category or from report type panel or from search panel >> click on start report.
4. Customise your report
 - Add fields from the left pane as shown below.
5. Save or run it.

New Items with Customer Orders Report

	Item: Item Id	Customer Order: Customer Order No	Expected Days Of Return	Prices
1	Item-05	Order - 0005	-	Akkala Harathi
2	Item-01	Order - 0001	-	Kavya
3	Item-02	Order - 0002	-	Jampala Hema
4	Item-03	Order - 0003	-	Sandhya
5	Item-04	Order - 0004	-	Nagaradona harshitha
6	Item-06	Order - 0006	-	D vani
7	Item-07	Order - 0007	-	Dhanasree
8	Item-08	Order - 0008	-	Karapareddy usha sree
9	Item-09	Order - 0009	-	Singiri Ushasree
10	Item-10	Order - 0010	-	Nagaradona harshitha

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CRM Application For Jewel Management

Dashboards

Create Dashboard

1. Go to the app >> click on the Dashboards tabs.
2. Give a Name as "Jewel Management" 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.

The screenshot shows a Salesforce Lightning dashboard titled 'Jewel Management'. The dashboard has three components:

- New Items with Prices Report:** A table showing items and their prices. The data is as follows:

Item: Ite...	Prices: Item Price	Prices: Gol...	Prices: Silve...
Item-01	Kavya	\$1.0000k	\$2.0000k
Item-02	Jampala Hema	\$5.0000k	\$15.0000k
Item-03	Sandhya	\$7.0000k	\$3.0000k
Item-04	Nagaradona harshitha	\$10.0000k	\$15.0000k
Item-05	Akkala Harathi	\$10.0000k	\$35.0000k
Item-06	D vani	\$5.0000k	\$4.0000k
Item-07	Dhanasree	\$800.00000	\$2.0000k

[View Report \(New Items with Prices Report\)](#)

- New Items with Customer Orders Report:** A table showing items and their corresponding customer orders. The data is as follows:

Item...	Customer Order: Custo...	Expected D...	Prices
Item-01	Order - 0001	-	Kavya
Item-02	Order - 0002	-	Jampala Hema
Item-03	Order - 0003	-	Sandhya
Item-04	Order - 0004	-	Nagaradona harshitha
Item-05	Order - 0005	-	Akkala Harathi

[View Report \(New Items with Customer Orders Report\)](#)

- New Billings with Item Report:** A table showing billings with item details. The data is as follows:

Gold/Silver Price ↑
\$2.00
\$4.00
\$15.00
\$15.00
\$100.00
\$500.00
\$700.00

[View Report \(New Billings with Item Report\)](#)

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Flows

Create a Flow

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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 "Billing" in the Drop down list.
4. Select the Trigger Flow when: "A record is Created or Updated".
5. Select the Optimise the flow for: "Actions and Related Records" and Click on Done.
6. Now change the mode form Auto-layout to free-form.
7. Now select the manger option in the toolbox, click New resource.
8. Select the resource type as text template.
9. Enter the API name as " Email body".
10. Change the view as Rich Text >> View to Plain Text.
11. In the body field paste the syntax that is given below.

Hello

Customer Name: {!\$Record.Item__r.Customer_Name__r.Name}

Here are the details for the item you purchased with Jewelry Inventory System

Item Type: {!\$Record.Item__r.Item_Type__c}

Ornament: {!\$Record.Ornament__c}

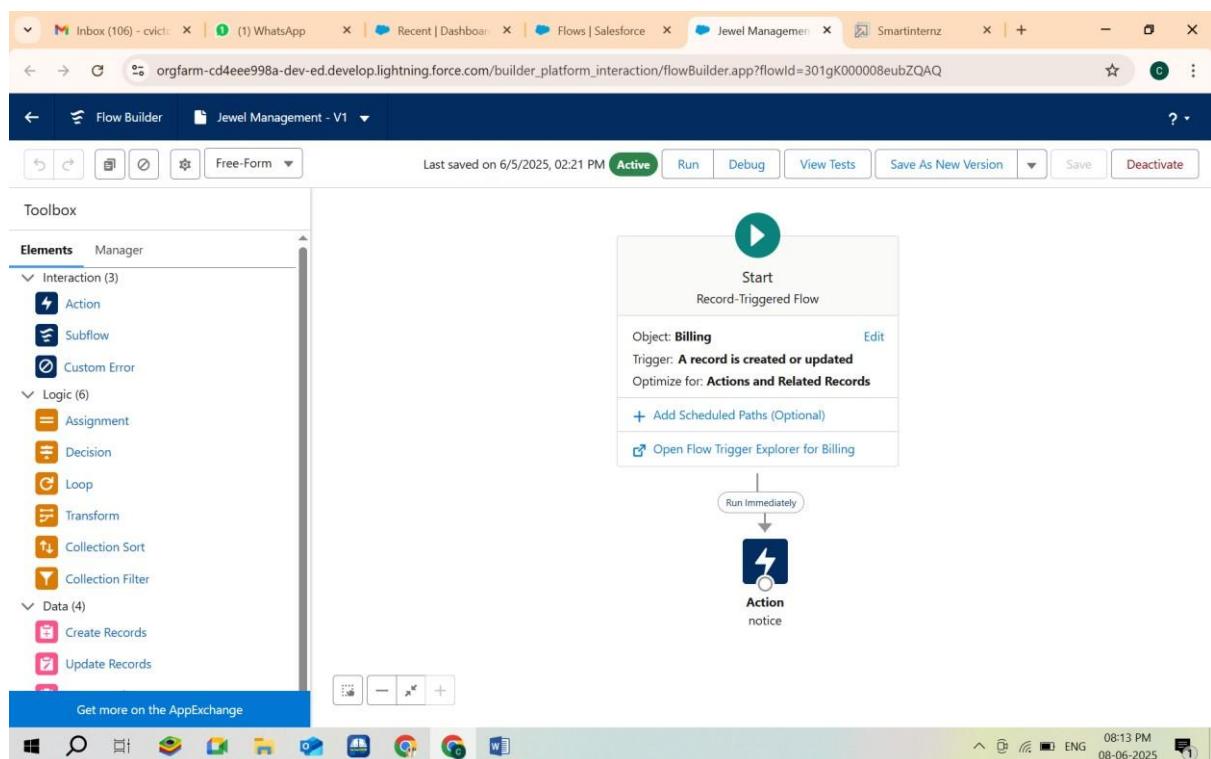
Weight: {!\$Record.Weight__c}grams

Amount: {!\$Record.Amount__c}

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 was created.

CRM Application For Jewel Management

19. Include Recipient Address list, select the email form the record.
({!!\$Record.Item_r.Customer_Namer.Email_c})
20. Include the subject as "Welcome to Jewelry Inventory System".
21. Click done.
22. Now drag the path from the start to the action element.
23. Click on save. Given the Flow label , Flow Api name will be auto populated.
24. And click on save and click Activate.



OUTPUT:

Jewel Management Tab:

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The screenshot shows a list of recently viewed jewel customers. The list includes:

- 1 Kavya
- 2 Jampala Hema
- 3 Sandhya
- 4 Spandhana
- 5 Dhanasree
- 6 D vani
- 7 Singiri Ushasree
- 8 Akkala Harathi
- 9 Nagaradona harshitha
- 10 Karapareddy usha sree

New Jewel Management Details:

The screenshot shows the 'New Jewel Customer' form being filled out. The information entered is:

Information	
*Customer name	Nagaradona harshitha
State	AndhraPradesh
Street	Balajicolon
Country	INDIA
Zip/Postal code	517501
City	Tirupati

The owner of the customer is listed as 'victorjoy chokka'.

Items Tab:

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The screenshot shows a list of recently viewed items. The header includes a search bar, navigation icons, and tabs for Jewelry Inventory S..., Jewel Customers, Items (selected), Prices, Customer Orders, Billings, Reports, and Dashboards. The main area displays a table with columns for Item Id and Name. The table contains 10 items, each with a checkbox and a dropdown menu icon. The items are numbered 1 to 10 and labeled Item-01 through Item-10.

New Item Details:

The screenshot shows the creation of a new item named "Gold". The modal window has a title "New Item: Gold". It contains a form with fields for Information, Owner, and Price. The "Information" section includes fields for Customer Name (Nagaradona harshitha), Ornament (Necklace), Weight (700.00000), Stone Weight (5.00000), and Percentage (50). The "Owner" section shows victorjoy chokka. At the bottom are buttons for Cancel, Save & New, and Save.

Prices Tab:

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The screenshot shows a CRM application interface for jewel management. The top navigation bar includes links for Jewelry Inventory S..., Jewel Customers, Items, Prices (selected), Customer Orders, Billings, Reports, and Dashboards. A search bar and various tool icons are also present. The main content area displays a 'Recently Viewed' list under the 'Prices' tab, showing 10 items updated a few seconds ago. The list includes items like Dhanasree, D vani, Kavya, Spandhana, Singiri Ushasree, Jampala Hema, Sandhya, Karapareddy usha sree, Akkala Harathi, and Nagaradona harshitha, each with a checkbox next to it.

New Price Tab Details:

The screenshot shows the 'New Price' dialog box overlaid on the Jewelry Inventory system. The dialog has fields for 'Information' including 'Item Price' (set to Nagaradona harshitha), 'Silver Price' (\$1,500.00000), and 'Gold Price' (\$1,400.00000). The 'Owner' field is set to victorjoy chokka. At the bottom are 'Cancel', 'Save & New', and 'Save' buttons. The background shows the same 'Recently Viewed' list of items as the previous screenshot.

Customer Orders Tab:

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The screenshot shows the 'Customer Orders' list view. At the top, there's a search bar and a toolbar with icons for New, Import, and Assign Label. Below the toolbar, a sub-header says 'Recently Viewed'. A message indicates '10 items • Updated a few seconds ago'. The main list displays 10 customer orders, each with a checkbox and a link labeled 'Order - <order_id>'. To the right of the list are several small icons for filtering and sorting.

New Customer Order Details:

The screenshot shows the 'New Customer Order' detail view. The title bar says 'New Customer Order'. On the left, a sidebar lists 'Recently Viewed' customer orders. The main form has a section titled 'Information' with fields for 'Customer Order No.' (containing 'Order - 0010'), 'Customer' (set to 'Nagaradona harshitha'), and 'Item' (set to 'Item-03'). A note at the top right says '* = Required Information'. At the bottom are three buttons: 'Cancel', 'Save & New', and 'Save'.

Billings Tab:

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The screenshot shows the CRM application interface with the Billings tab selected. On the left, there's a sidebar titled 'Billings' with a 'Recently Viewed' section containing 10 items. The main area displays a table with columns for Billing Name, Owner, and other details. The table includes rows for various names like Nagaradona harshitha, Singiri Ushasree, etc.

New Billing Tab Details:

The screenshot shows the 'New Billing' form. It has fields for 'Billing Name' (set to 'Nagaradona harshitha'), 'Item' (set to 'Item-01'), and 'Paid Amount' (\$1,000). The form also shows the owner as 'victorjoy chokka'. At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.

Reports Tab:

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REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Items with Customer Orders Report		Private Reports	victorjoy chokka	6/5/2025, 12:06 AM	
Created by Me	New Billings with Item Report		Private Reports	victorjoy chokka	6/4/2025, 11:28 PM	
Public Reports	New Items with Prices Report		Private Reports	victorjoy chokka	6/5/2025, 12:08 AM	
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

New Reports Tab Details:

Item: Item Id	Customer Order: Customer Order No	Expected Days Of Return	Prices
1 Item-05	Order - 0005	-	Akkala Harathi
2 Item-01	Order - 0001	-	Kavya
3 Item-02	Order - 0002	-	Jampala Hema
4 Item-03	Order - 0003	-	Sandhya
5 Item-04	Order - 0004	-	Nagaradona harshitha
6 Item-06	Order - 0006	-	D vani
7 Item-07	Order - 0007	-	Dhanasree
8 Item-08	Order - 0008	-	Karapareddy usha sree
9 Item-09	Order - 0009	-	Singiri Ushasree
10 Item-10	Order - 0010	-	Nagaradona harshitha

Dashboards Tab:

CRM Application For Jewel Management

The screenshot shows the CRM application's dashboard management interface. The top navigation bar includes links for 'Jewelry Inventory S...', 'Dashboards', 'Recent', and other categories like 'Customer Orders', 'Billings', 'Reports'. Below the navigation is a search bar and a toolbar with icons for star, plus, question, gear, and bell. The main content area is titled 'Recent' and shows a table of recent dashboards. One row is selected, showing details: 'Dashboard Name' is 'Jewel Management', 'Folder' is 'Private Dashboards', 'Created By' is 'victorjoy chokka', and 'Created On' is '6/5/2025, 12:10 AM'. To the left of the table is a sidebar with sections for 'DASHBOARDS', 'FOLDERS', and 'FAVORITES', each listing options like 'Created by Me', 'Shared with Me', and 'All Favorites'.

New Dashboards Details:

The screenshot shows a specific dashboard titled 'Jewel Management'. The dashboard header includes a refresh button, edit button, and subscribe dropdown. A message indicates it was last refreshed 6 days ago. The dashboard body contains three reports:

- New Items with Prices Report:**

Item: Ite...	Prices: Item Price	Prices: Gol...	Prices: Silve...
Item-01	Kavya	\$1.00000k	\$2.00000k
Item-02	Jampala Hema	\$5.00000k	\$15.00000k
Item-03	Sandhya	\$7.00000k	\$3.00000k
Item-04	Nagaradona harshitha	\$10.00000k	\$15.00000k
Item-05	Akkala Harathi	\$10.00000k	\$35.00000k
Item-06	D vani	\$5.00000k	\$4.00000k
Item-07	Dhanasree	\$800.00000	\$2.00000k
- New Items with Customer Orders Report:**

It...	Customer Order: Custo...	Expected D...	Prices
Item-01	Order - 0001	-	Kavya
Item-02	Order - 0002	-	Jampala Hema
Item-03	Order - 0003	-	Sandhya
Item-04	Order - 0004	-	Nagaradona harshitha
Item-05	Order - 0005	-	Akkala Harathi
- New Billings with Item Report:**

Gold/Silver Price ↑
\$2.00
\$4.00
\$15.00
\$15.00
\$100.00
\$500.00
\$700.00