

Project Name

Crm Application for Jewel Management - (admin)

By

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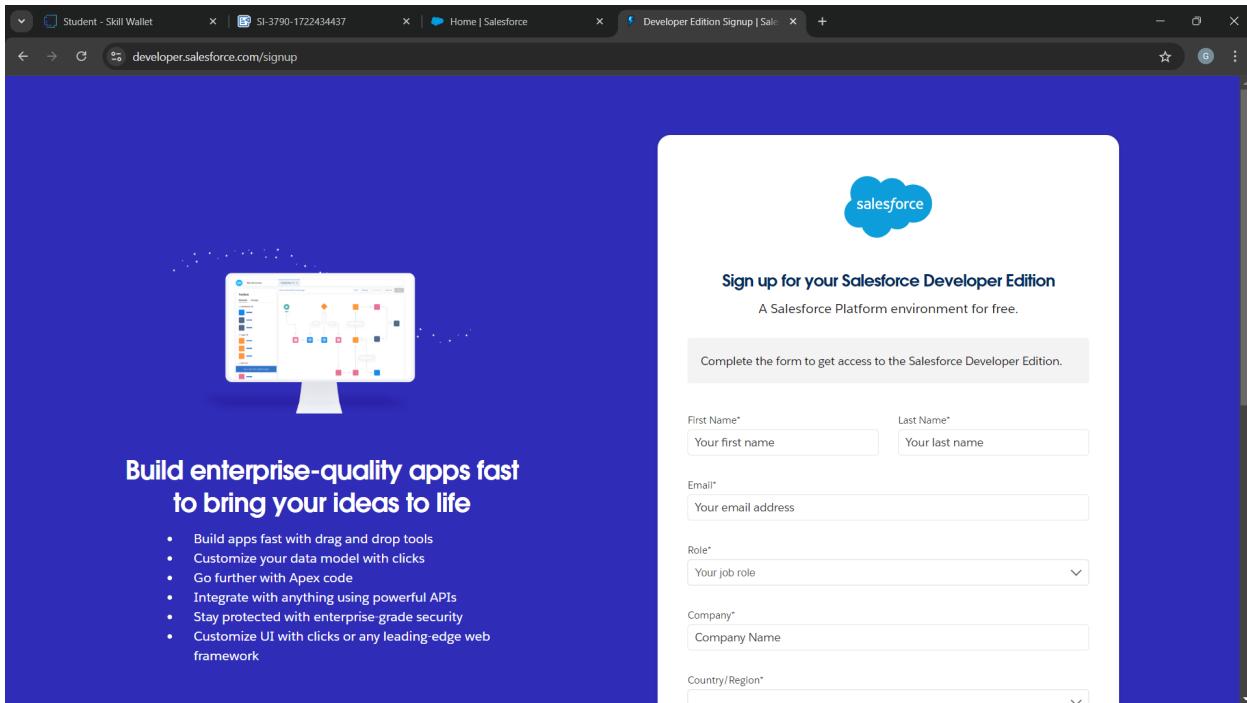
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Task 1:

Creating Developer Account

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



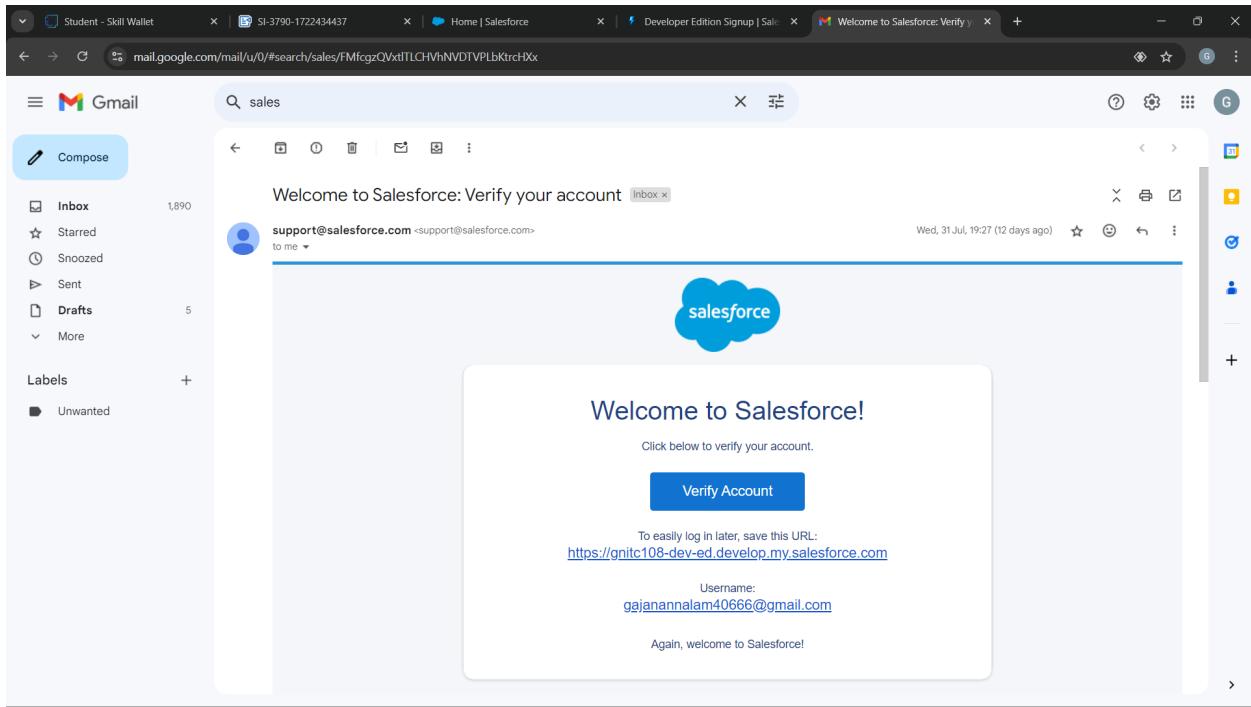
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format : username@organization.com
Click on sign me up after filling these.

Task 2:

Account Activation

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



2. Click on Verify Account

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

Change Your Password

Enter a new password for lead@sb.com.

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

Change Password

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

The screenshot shows the Salesforce Setup Home page. The top navigation bar includes a cloud icon, 'Setup' (selected), 'Home', 'Object Manager', and various global icons. The left sidebar has a 'Quick Find' search bar and links to 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', and 'ADMINISTRATION' (with a 'Users' link). The main content area features a 'SETUP Home' section with three cards: 'Get Started with Einstein Bots' (Launch an AI-powered bot to automate your digital connections. 'Get Started'), 'Mobile Publisher' (Use the Mobile Publisher to create your own branded mobile app. 'Learn More'), and 'Real-time Collaborative Docs' (Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce. 'Get Started').

Task 3:

What is an Object?

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

Create Jewel Customer Object

1. To create an object:

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

5. Click on Allow reports.

6. Allow search --> Save.

The screenshot shows the Salesforce Setup interface for creating a new object. The browser tabs at the top include 'Student - Skill Wallet', 'SI-3790-1722434437', 'Jewel Customer | Salesforce', and 'Developer Edition Signup | Sale'. The main window is titled 'SETUP > OBJECT MANAGER' and shows 'Jewel Customer' selected. On the left, a sidebar lists various object configuration options like Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, and Triggers. The right panel is titled 'Details' and contains fields for API Name ('Jewel_Customer__c'), Singular Label ('Jewel Customer'), Plural Label ('Jewel Customers'), Description (empty), Enable Reports (unchecked), Track Activities (unchecked), Track Field History (unchecked), Deployment Status ('Deployed'), and Help Settings ('Standard salesforce.com Help Window'). At the bottom of the right panel are 'Edit' and 'Delete' buttons. The URL in the address bar is <https://gnitc108-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01dL000001mHsP/Details/view>.

Create 3 more objects with label names as Customer Order, Price, Billing
(Use "Auto Number" as a data type for Customer Order, Price, Billing).

Customer Order

The screenshot shows the Salesforce Object Manager interface for the 'Customer Order' object. The left sidebar lists various configuration 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, List View Button Layout, Restriction Rules, Scoping Rules, and Triggers. The main 'Details' tab is selected, displaying the following information:

Setting	Value
Description	
API Name	Customer_Order__c
Custom	✓
Singular Label	Customer Order
Plural Label	Customer Orders
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the top right of the main area are 'Edit' and 'Delete' buttons.

Price

The screenshot shows the Salesforce Object Manager interface for the 'Customer Order' object. The left sidebar lists various configuration 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, List View Button Layout, Restriction Rules, Scoping Rules, and Triggers. The main 'Details' tab is selected, displaying the following information:

Setting	Value
Description	
API Name	Customer_Order__c
Custom	✓
Singular Label	Customer Order
Plural Label	Customer Orders
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the top right of the main area are 'Edit' and 'Delete' buttons.

Billing

The screenshot shows the Salesforce Object Manager Details page for the 'Billing' object. The URL in the browser is gnitc108-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01dL000001mIN3/Details/view. The page title is 'Billing | Salesforce'. The left sidebar lists various configuration tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, and Triggers. The main content area is titled 'Details' and contains the following fields:

Description	<input type="text"/>
API Name	<input type="text" value="Billing__c"/>
Custom	<input checked="" type="checkbox"/>
Singular Label	<input type="text" value="Billing"/>
Plural Label	<input type="text" value="Billings"/>
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input type="checkbox"/>
Track Field History	<input type="checkbox"/>
Deployment Status	<input type="text" value="Deployed"/>
Help Settings	<input type="text" value="Standard salesforce.com Help Window"/>

At the top right of the main content area are 'Edit' and 'Delete' buttons.

Task 4

Tabs

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

Creating a Custom Tab

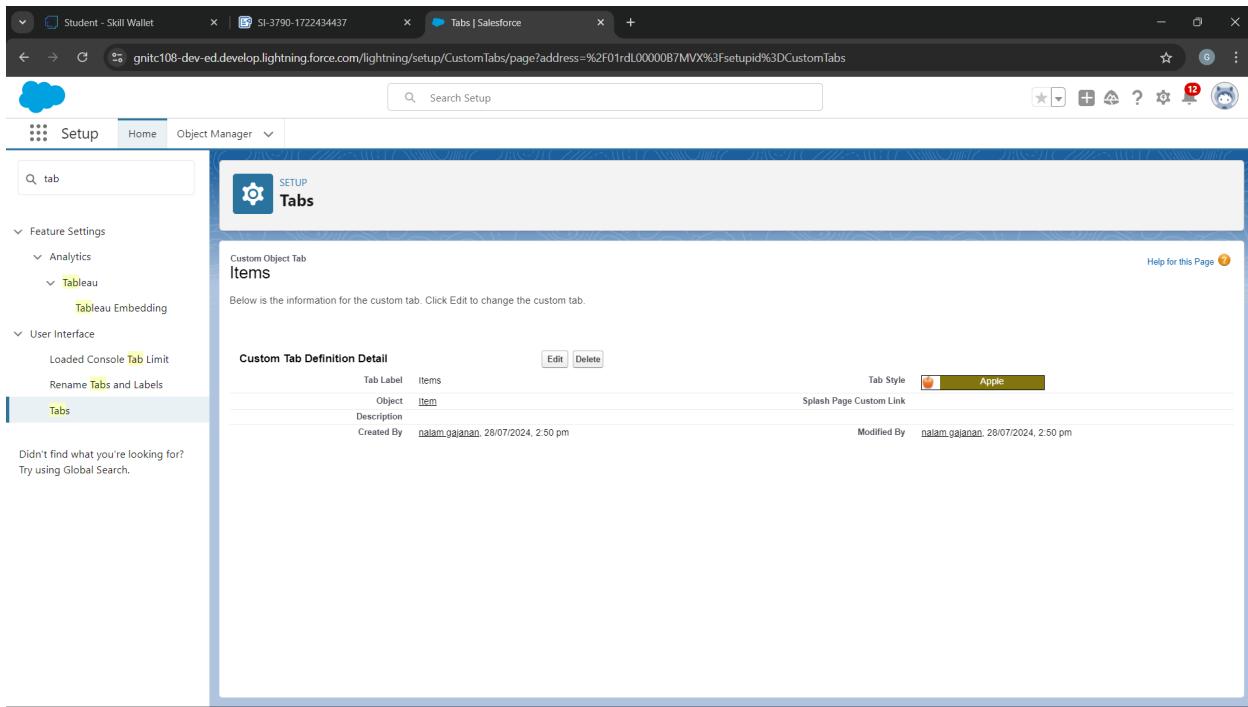
To create a Tab:(Customer)

- 1.Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom 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.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. On the left, the navigation sidebar is open, showing sections like Feature Settings (Analytics, Tableau, Tableau Embedding), User Interface (Loaded Console Tab Limit, Rename Tabs and Labels, Tabs), and Global Search. The 'Tabs' section is highlighted. The main content area displays a 'Custom Object Tab' for 'Jewel Customers'. The 'Custom Tab Definition Detail' table contains the following information:

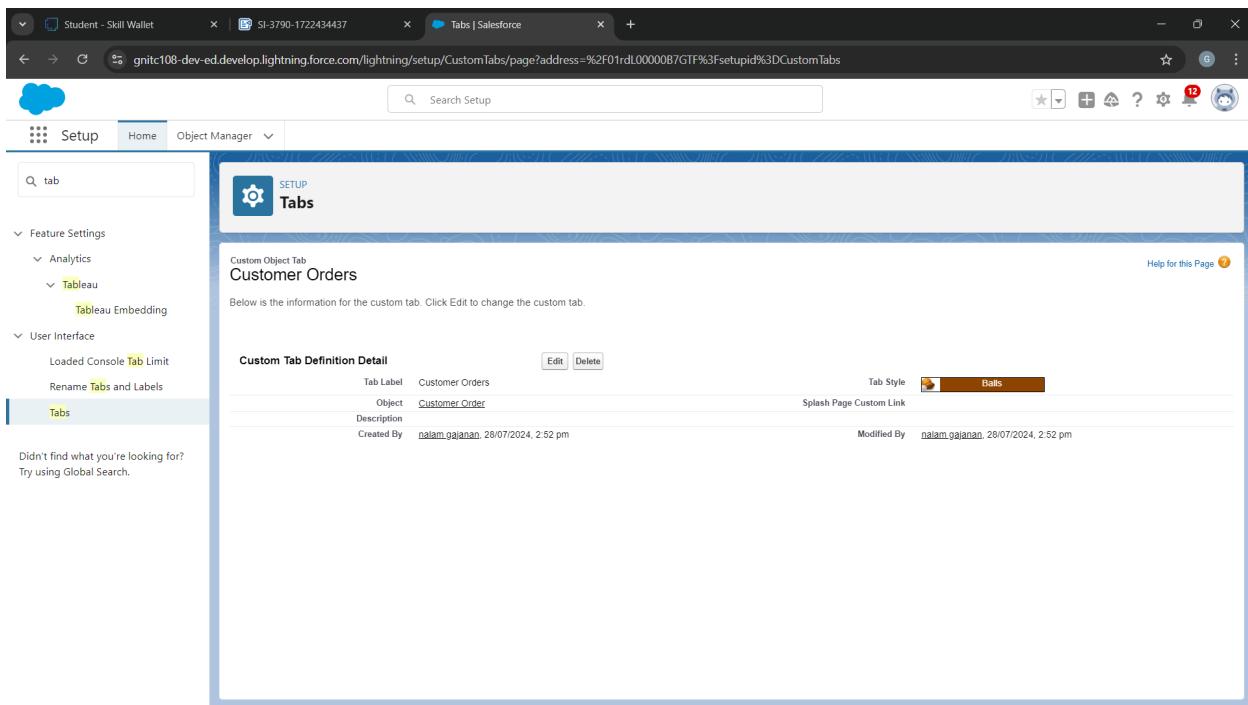
Tab Label	Jewel Customers	Edit	Delete
Object	Jewel Customer	Tab Style	Apple
Description		Splash Page Custom Link	
Created By	nalan_gajanan, 28/07/2024, 2:47 pm	Modified By	nalan_gajanan, 28/07/2024, 2:47 pm

Create a Tab:(Item)



The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. On the left, the 'Tabs' section of the navigation menu is highlighted. The main content area displays a 'Custom Tab Definition Detail' for a tab named 'Item'. The tab is defined for the 'Object' 'Item'. The 'Tab Style' is set to 'Apple'. The 'Created By' field shows 'nalam_gajanan' and the 'Created Date' is '28/07/2024, 2:50 pm'. The 'Modified By' field also shows 'nalam_gajanan' and the 'Modified Date' is '28/07/2024, 2:50 pm'. A note at the bottom of the page says ' Didn't find what you're looking for? Try using Global Search.'

Create a Tab:(Customer Order)



The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. On the left, the 'Tabs' section of the navigation menu is highlighted. The main content area displays a 'Custom Tab Definition Detail' for a tab named 'Customer Orders'. The tab is defined for the 'Object' 'Customer Order'. The 'Tab Style' is set to 'Balls'. The 'Created By' field shows 'nalam_gajanan' and the 'Created Date' is '28/07/2024, 2:52 pm'. The 'Modified By' field also shows 'nalam_gajanan' and the 'Modified Date' is '28/07/2024, 2:52 pm'. A note at the bottom of the page says ' Didn't find what you're looking for? Try using Global Search.'

Create a Tab:(Price)

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. On the left, the navigation sidebar includes 'Feature Settings' (Analytics, Tableau, Tableau Embedding), 'User Interface' (Loaded Console Tab Limit, Rename Tabs and Labels), and 'Tabs' (which is highlighted). A search bar at the top right says 'Search Setup'. The main content area displays a 'Custom Object Tab Prices' section. It shows a 'Custom Tab Definition Detail' table with the following data:

Tab Label	Prices	Tab Style	Balls
Object	Price	Splash Page Custom Link	
Description			
Created By	nalam_gajanan, 28/07/2024, 2:52 pm	Modified By	nalam_gajanan, 28/07/2024, 2:52 pm

Create a Tab:(Billing)

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. On the left, the navigation sidebar includes 'Feature Settings' (Analytics, Tableau, Tableau Embedding), 'User Interface' (Loaded Console Tab Limit, Rename Tabs and Labels), and 'Tabs' (which is highlighted). A search bar at the top right says 'Search Setup'. The main content area displays a 'Custom Object Tab Billings' section. It shows a 'Custom Tab Definition Detail' table with the following data:

Tab Label	Billings	Tab Style	Apple
Object	Billing	Splash Page Custom Link	
Description			
Created By	nalam_gajanan, 28/07/2024, 2:51 pm	Modified By	nalam_gajanan, 28/07/2024, 2:51 pm

Task 5 :

The Lightning App

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

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

Create a Lightning App

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 : Jewellery 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:

App Settings

App Details & Branding
App Options
Utility Items (Desktop Only)

Navigation Items

Navigation Rules
User Profiles

Navigation Items

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

Available Items

Selected Items

Jewel Customers
Items
Customer Orders
Prices
Billings
Reports
Dashboards

avascriptrtvoid();

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:

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Selected Profiles

System administrator

Save & Finish

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

Task 6 :

Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields :

- Standard Fields
- Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

>> Created By
>> Owner
>> Last Modified
>> Field Made During object Creation

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organiser or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

Use Case:

Now it's time for you to think out of the box for your organisation. You have successfully created the database objects for the organisation but now all eyes turn on you as you have to define what sort of information the objects store which you have created. As a life saver of your organisation you come up with the idea of creating fields to store different types of data.

Creating Lookup Relationship

A Lookup relationship is a type of relationship in Salesforce that connects two objects together based on a field known as the Lookup field. It establishes a relationship between a child object and a parent object, allowing the child object to reference the parent object.

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.

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

- Page Headers:** Student - Skill Wallet, SL-3790-1722434437, Customer Order | Salesforce.
- Search Bar:** Search Setup.
- Left Navigation:** Object Manager, Customer Order.
- Left Sidebar:** Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers.
- Table:** Fields & Relationships (6 Items, Sorted by Field Label). The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Jewel Customer)		✓
Customer Order Id	Name	Auto Number		✓
Item	Item__c	Master-Detail(Item)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Order Status	Order_Status__c	Picklist		

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

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.

The screenshot shows the Salesforce Setup interface for the Customer Order object. The left sidebar lists various configuration options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main content area is titled 'Fields & Relationships' and displays a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Jewel Customer)	✓	▼
Customer Order Id	Name	Auto Number	✓	▼
Item	Item__c	Master-Detail(Item)	✓	▼
Last Modified By	LastModifiedById	Lookup(User)		
Order Status	Order_Status__c	Picklist		▼

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: City
- Length : 20
- Field Name : gets auto generated
- Click on Next >> Next >> Save and new.

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

- Page Header:** Student - Skill Wallet, Si-3790-1722434437, Jewel Customer | Salesforce
- Search Bar:** Search Setup
- Navigation:** Setup > OBJECT MANAGER > Jewel Customer
- Left Sidebar:** Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers.
- Table:** Fields & Relationships (11 items, Sorted by Field Label)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City_c	Text(20)		
Country	Country_c	Text(18)		
Created By	CreatedById	Lookup(User)		
Customer name	Name	Text(80)		✓
Email	Email_c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone_c	Phone		
State	State_c	Text(20)		
Street	Street_c	Text(20)		

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”.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Country	Country__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Customer name	Name	Text(80)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Phone	Phone__c	Phone		
State	State__c	Text(20)		
Street	Street__c	Text(20)		

5.Field Name will be auto populated, and click on Next >> Next >> Save & new.

Creating the Email 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 “Email” and click Next.
- 4.Given the Field Label as “ Email”.

The screenshot shows the Salesforce Setup interface for the 'Object Manager'. The 'Jewel Customer' object is selected. The 'Fields & Relationships' tab is active. The table lists the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Country	Country__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Customer name	Name	Text(80)		✓
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
State	State__c	Text(20)		
Street	Street__c	Text(20)		

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".

The screenshot shows the Salesforce Setup interface for the 'Object Manager'. The 'Item' object is selected. The 'Fields & Relationships' tab is active. A new custom field is being created, currently on 'Step 2: Enter the details'. The configuration is as follows:

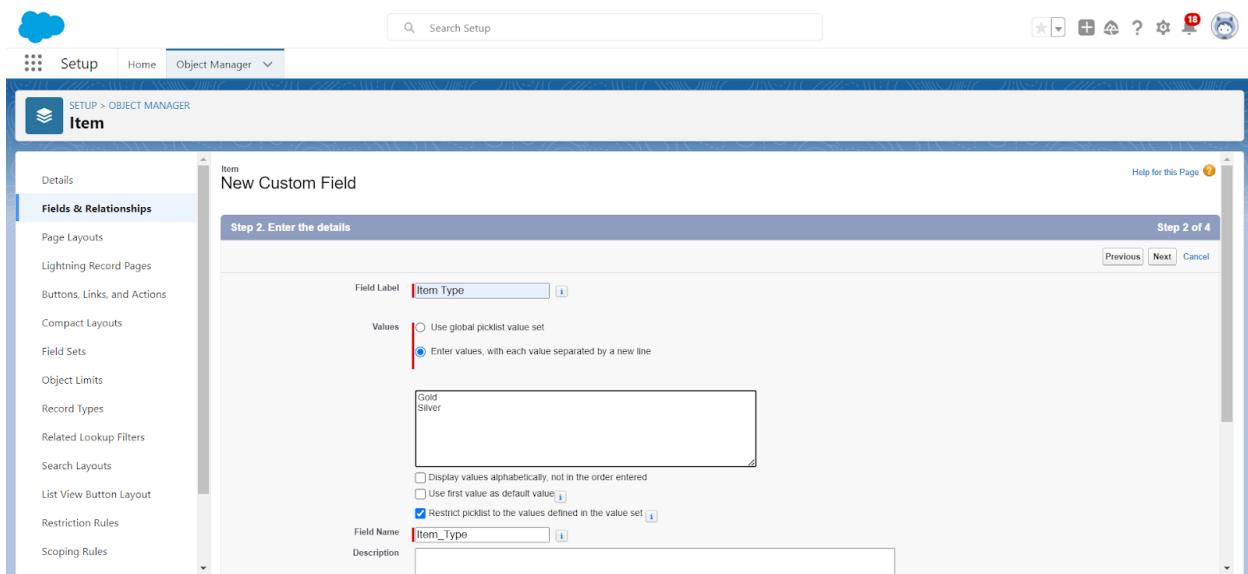
- Field Label: Purity
- Length: 2
- Decimal Places: 0

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

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

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.

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

- Object Manager:** Price
- Custom Field Definition Detail:**
 - Field Information:**

Field Label	Gold Price
Field Name	Gold_Price
API Name	Gold_Price__c
Description	Help Text
Data Owner	Field Usage
Data Sensitivity Level	Compliance Categorization
Created By	najam_gajanan 29/07/2024, 11:36 am
Modified By	najam_gajanan 29/07/2024, 11:36 am
 - General Options:** Required (checkbox checked)
 - Currency Options:** Length: 8, Decimal Places: 5
 - Validation Rules:** New (button)

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 .

Creating Formula Field(Cross Object) in Item Object

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.

Creating Remaining Fields in Objects

Now create the remaining fields using the data types mentioned.

S.no	Object name	Fields										
1	Jewel Customer	<table border="1"> <tr> <td>Field Name</td><td>Data type</td></tr> <tr> <td>State</td><td>Text(20)</td></tr> <tr> <td>Street</td><td>Text(20)</td></tr> <tr> <td>Country</td><td>Text(18)</td></tr> <tr> <td>Zip/Postal code</td><td>Text(6)</td></tr> </table>	Field Name	Data type	State	Text(20)	Street	Text(20)	Country	Text(18)	Zip/Postal code	Text(6)
Field Name	Data type											
State	Text(20)											
Street	Text(20)											
Country	Text(18)											
Zip/Postal code	Text(6)											

1. Fields for Jewel Customer

The screenshot shows the Salesforce Setup interface for the 'Jewel Customer' object. The left sidebar lists various setup categories like Details, Page Layouts, Lightning Record Pages, etc. The main content area is titled 'Fields & Relationships' and displays 11 items, sorted by Field Label. The fields listed are:

Field Name	Label	Type
City	City__c	Text(20)
Country	Country__c	Text(18)
Created By	CreatedBy	Lookup(User)
Customer name	Name	Text(80)
Email	Email__c	Email
Last Modified By	LastModifiedBy	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Phone	Phone__c	Phone
State	State__c	Text(20)
Street	Street__c	Text(20)
Zip/Postal code	Zip_Postal_code__c	Text(6)

2. Fields for Item

The screenshot shows the Salesforce Setup interface for the 'Item' object. The left sidebar lists various setup categories. The main content area is titled 'Fields & Relationships' and displays 23 items, sorted by Field Label. The fields listed are:

Field Name	Label	Type
Prices	Prices__c	Lookup(Price)
Priority	Priority__c	Picklist
Purity	Purity__c	Number(2, 0)
Purity Gold Price	Purity_Gold_Price__c	Formula (Currency)
Record Type	RecordTypeId	Record Type
Silver Price	Silver_Price__c	Formula (Number)
Stone Weight	Stone_Weight__c	Number(5, 5)
Stone/Other Price	Stone_Other_Price__c	Currency(8, 2)
Total Weight	Total_Weight__c	Formula (Number)
Weight	Weight__c	Number(8, 5)

2	Item	
	Field Label:Customer Name	Lookup Relationship with Jewel Customer Object
	Ornament	Text(20)
	Weight	Number (Length=8,Decimal=5)
	Stone Weight	Number (Length=5,Decimal=5)
	Percentage	Number (Length=2,Decimal=0)
	Stone/Other Price	Currency (Length=8,Decimal=2)

	Expected Days Of Return	Picklist <div style="border: 1px solid black; padding: 5px;"> 1-3 Days 4-5 Days 6-7 Days 8-10 Days </div>
	Priority	Picklist <div style="border: 1px solid black; padding: 5px;"> Low Medium High Critical </div>
	Silver Price	Formula (Return Type:Number) (Decimal=3) <div style="border: 1px solid black; padding: 5px;"> $(Prices_r.Silver_price_c / 1000)$ </div>
	Purity Gold Price	Formula (Return Type:Currency) (Decimal=2) <div style="border: 1px solid black; padding: 5px;"> $((Prices_r.Gold_price_c * Purity_c) / 24) / 10$ </div>

	Purity Gold Price	<p>Formula (Return Type:Currency) (Decimal=2)</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> $((Prices_r.Gold_price_c * Purity_c) / 24) / 10$ </div>
	Total Weight	<p>Formula (Return Type:Number) (Decimal=3)</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> $(Weight_c - Stone_weight_c)$ </div>
	Amount	<p>Formula (Return Type:Currency) (Decimal=3)</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> $IF(ISPICKVAL(Item_Type_c, "Gold"), Total_weight_c * Purity_Gold_price_c , Total_weight_c * Silver_price_c)$ </div>
	KDM	<p>Formula (Return Type:Currency) (Decimal=0)</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> $(Amount_c * Percentage_c) / 100$ </div>

	Making Charges	Formula (Return Type:Currency) (Decimal=0) IF(ISPICKVAL(Item_Type_c , "Gold"), Weight_c * 300 , Weight_c * 10)
--	----------------	---

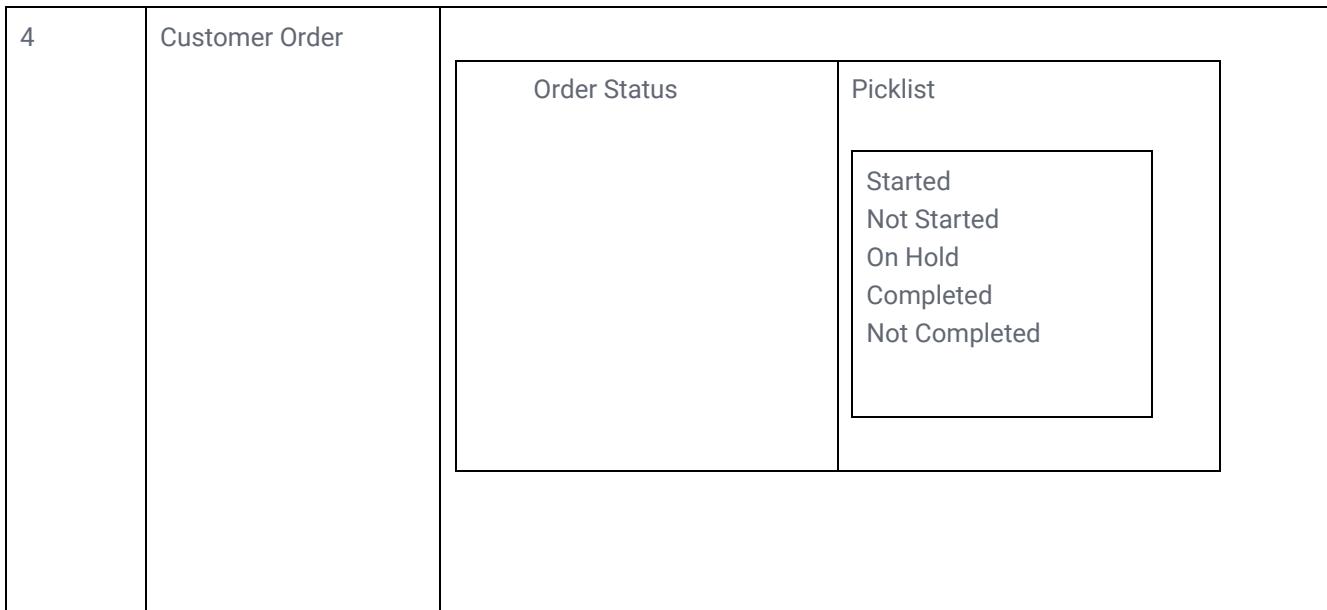
3.Fields for Price

3	Price	Silver Price	Currency (Length=8,Decimal=5)
---	-------	--------------	----------------------------------

The screenshot shows the Salesforce Object Manager interface for the 'Price' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays the 'Fields & Relationships' section with a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Gold Price	Gold_Price__c	Currency(8, 5)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Price	Name	Auto Number		✓
Silver Price	Silver_Price__c	Currency(8, 5)		

4.Fields for Customer Order



The screenshot shows the Salesforce Setup interface for the Customer Order object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main area displays the 'Fields & Relationships' section with the following table:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Jewel Customer)	✓	▼
Customer Order Id	Name	Auto Number	✓	▼
Item	Item__c	Master-Detail(Item)	✓	▼
Last Modified By	LastModifiedById	Lookup(User)		
Order Status	Order_Status__c	Picklist		▼

5	Billing	<table border="1" data-bbox="589 249 1478 1913"> <tbody> <tr> <td data-bbox="589 249 959 418">Field Label:Item</td><td data-bbox="959 249 1478 418">Lookup Relationship with Item Object</td></tr> <tr> <td data-bbox="589 418 959 692">Ornament</td><td data-bbox="959 418 1478 692"> Formula (Return Type:Text) <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">Item__r.Ornament__c</div> </td></tr> <tr> <td data-bbox="589 692 959 994">Stone weight</td><td data-bbox="959 692 1478 994"> Formula (Return Type:Number) (Decimal=2) <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">Item__r.Stone_weight__c</div> </td></tr> <tr> <td data-bbox="589 994 959 1269">Weight</td><td data-bbox="959 994 1478 1269"> Formula Return Type:Number (Decimal=2) <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">Item__r.Total_weight__c</div> </td></tr> <tr> <td data-bbox="589 1269 959 1537">Amount</td><td data-bbox="959 1269 1478 1537"> Formula (Return Type:Currency) (Decimal=2) <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">Item__r.Amount__c</div> </td></tr> <tr> <td data-bbox="589 1537 959 1913">Gold/Silver Price</td><td data-bbox="959 1537 1478 1913"> Formula (Return Type:Currency) (Decimal=2) <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">IF(ISPICKVAL(Item__r.Item_Type__c , "Gold"), Item__r.Gold_price__c ,</div> </td></tr> </tbody> </table>	Field Label:Item	Lookup Relationship with Item Object	Ornament	Formula (Return Type:Text) <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">Item__r.Ornament__c</div>	Stone weight	Formula (Return Type:Number) (Decimal=2) <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">Item__r.Stone_weight__c</div>	Weight	Formula Return Type:Number (Decimal=2) <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">Item__r.Total_weight__c</div>	Amount	Formula (Return Type:Currency) (Decimal=2) <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">Item__r.Amount__c</div>	Gold/Silver Price	Formula (Return Type:Currency) (Decimal=2) <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">IF(ISPICKVAL(Item__r.Item_Type__c , "Gold"), Item__r.Gold_price__c ,</div>
Field Label:Item	Lookup Relationship with Item Object													
Ornament	Formula (Return Type:Text) <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">Item__r.Ornament__c</div>													
Stone weight	Formula (Return Type:Number) (Decimal=2) <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">Item__r.Stone_weight__c</div>													
Weight	Formula Return Type:Number (Decimal=2) <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">Item__r.Total_weight__c</div>													
Amount	Formula (Return Type:Currency) (Decimal=2) <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">Item__r.Amount__c</div>													
Gold/Silver Price	Formula (Return Type:Currency) (Decimal=2) <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">IF(ISPICKVAL(Item__r.Item_Type__c , "Gold"), Item__r.Gold_price__c ,</div>													

		Item__r.Silver_price__c)
	KDM Charge	Formula (Return Type:Currency) (Decimal=0) Item__r.KDM__c
	Making Charges	Formula (Return Type:Currency) (Decimal=2) Item__r.Making_Charges__c
	Stones/other price	Formula (Return Type:Currency) (Decimal=2) Item__r.Stone_other_price__c
	Total Amount	Formula (Return Type:Currency) (Decimal=0) Amount__c + KDM_Charge__c + Stones_other_price__c + Making_Charges__c

5. Fields for Billing

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'Fields & Relationships' and lists various setup categories. The main content area is titled 'Fields & Relationships' and displays a table of fields for the 'Billing' object. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. There are 14 items listed.

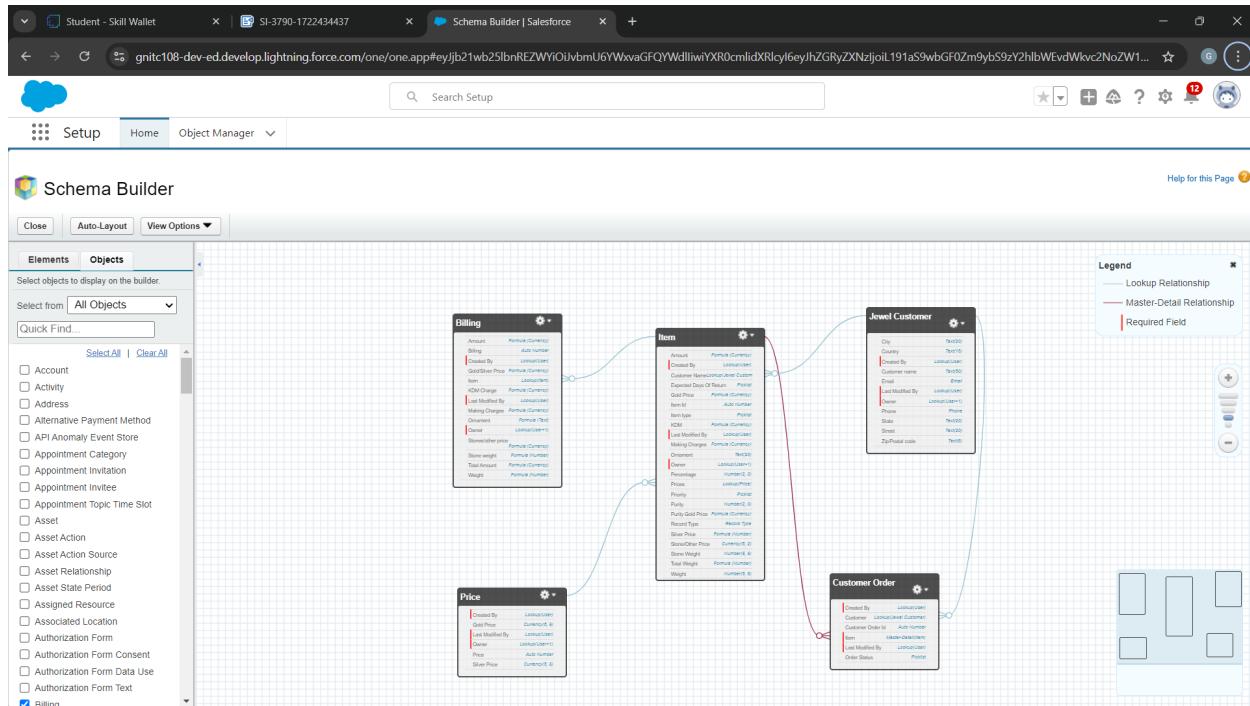
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Billing	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Gold/Silver Price	Gold_Silver_Price__c	Formula (Currency)		
Item	Item__c	Lookup(Item)		✓
KDM Charge	KDM_Charge__c	Formula (Currency)		
Last Modified By	LastModifiedById	Lookup(User)		
Making Charges	Making_Charges__c	Formula (Currency)		
Ornament	Ornament__c	Formula (Text)		
Owner	OwnerId	Lookup(User,Group)		✓

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.



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.

This screenshot shows the 'New Field Dependency' configuration page. It has two dropdown menus: 'Controlling Field' (set to 'None') and 'Dependent Field' (set to 'None'). Below the form are 'Continue' and 'Cancel' buttons.

Help for this Page

Create a dependent relationship that causes the values in a picklist or multi-select picklist to be dynamically filtered based on the value selected by the user in another field.

- The field that drives filtering is called the "controlling field." Standard and custom checkboxes and picklists with at least one and less than 300 values can be controlling fields.
- The field that has its values filtered is called the "dependent field." Custom picklists and multi-select picklists can be dependent fields.

Step 1. Select a controlling field and a dependent field. Click Continue when finished.

Step 2. On the following page, edit the filter rules that control the values that appear in the dependent field for each value in the controlling field.

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))

)

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.

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.

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.

SETUP > OBJECT MANAGER
Jewel Customer

Validation Rule Edit

Rule Name: **Postal Code**

Active:

Description:

Error Condition Formula

Example: **Discount_Percent_c>0.30** More Examples...

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

AND (OR (LEN(Zip_Postal_code_c) <> 6, NOT(REGEX(Zip_Postal_code_c, "^[0-9]{6}\$"))), NOT(ISBLANK(Zip_Postal_code_c)))

Functions: ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN

ABS(number)
Returns the absolute value of a number, a number without its sign

Check Syntax: No errors found

Error Message

Example: **Discount percent cannot exceed 30%**

This message will appear when Error Condition formula is true

Error Message: **Must contain 6 digits**

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

Error Location: Top of Page Field **Zip/Postal code**

Save Save & New Cancel

Task 7 :

Profiles

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

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 with the following details:

- Setup Home:** The top navigation bar shows "Student - Skill Wallet" and "SI-3790-1722434437".
- Search Bar:** A search bar at the top right contains the text "prof".
- Profile List:** On the left, under "Users", there is a "Profiles" section with a search bar containing "prof".
- Profile Detail:** The main content area shows the "Gold Smith" profile details:
 - Name:** Gold Smith
 - User License:** Salesforce
 - Description:** Not assigned
 - Created By:** nalam gajanan, 31/07/2024, 7:13 pm
 - Modified By:** nalam gajanan, 31/07/2024, 8:15 pm
- Page Layouts:** A table showing standard object layouts and their corresponding global page layouts:

Standard Object Layouts	Global	Location Group Assignment	Location Group Assignment Layout
Email Application	Not Assigned [View Assignment]	Macro	Macro Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Account	Account Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Order	Order Layout [View Assignment]

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 as worker profile>> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Items, Price and Customer Order objects.
4. Scroll down and Click on Save.

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

- Page Header:** Student - Skill Wallet, SL-3790-1722434437, Profiles | Salesforce.
- Search Bar:** Search Setup.
- Left Navigation:** Setup, Home, Object Manager.
- Search Bar:** Q prof.
- Section:** Profiles
- Profile Detail:** worker
User License: Salesforce Platform
Description:
Created By: nalam.gajanan_ 31/07/2024, 7:15 pm
Modified By: nalam.gajanan_ 31/07/2024, 8:15 pm
- Page Layouts:** Standard Object Layouts, Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, Asset.
- Permissions:** Login IP Ranges, Enabled Apex Class Access, Enabled Visualforce Page Access, Enabled External Data Source Access, Enabled Named Credential Access, Enabled External Credential Principal Access, Enabled Custom Metadata Type Access, Enabled Custom Setting Definitions Access, Enabled Flow Access, Enabled Service Presence Status Access, Enabled Custom Permissions.

Task 8 :

Roles

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organisation can have to data. Simply put, it describes what a user could see within the Salesforce organisation.

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.

Note:

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

The screenshot shows the Salesforce Setup interface with the 'Roles' page open. The left sidebar shows navigation options like 'Setup', 'Home', and 'Object Manager'. Under 'Users', 'Roles' is selected. The main content area displays a tree view titled 'Creating the Role Hierarchy'. The hierarchy is as follows:

- GMTC
 - CEO
 - Add Role
 - CFO
 - Add Role
 - COO
 - Add Role
 - Gold Smith
 - Add Role
 - Worker
 - Add Role
 - SVP_Customer_Service & Support
 - Add Role
 - SVP_Human_Resources
 - Add Role
 - SVP_Sales & Marketing
 - Add Role

Task 9 :

Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Create User-1

The screenshot shows the Salesforce Setup interface for creating a new user. The URL in the browser is <https://gnitc108-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005dL000005qeK%3FnoRedirect%3D1%26isUserEntityOverride%3D1>.

The page title is "Users | Salesforce". The left sidebar shows the navigation menu under "Users":

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users** (selected)
- Feature Settings
- Data.com
- Prospector Users

The main content area displays the "User Detail" for a user named "Niklaus Mikaelson". The user's details include:

Field	Value	Action
Name	Niklaus Mikaelson	Role: Gold_Smith
Alias	gajanan	User License: Salesforce
Email	gajananalamb406@gmail.com (Verify) [i]	Profile: Gold_Smith
Username	gajananalamb40666@gmail.com	Active: <input checked="" type="checkbox"/>
Nickname	User17224339295511383569 [i]	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+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User: <input type="checkbox"/>
Locale	English (India)	WDC User: <input type="checkbox"/>
Language	English	Mobile Push Registrations: View
Delegated Approver	Manager	Data.com User Type: View
Receive Approval Request Emails	Only if I am an approver	Accessibility Mode (Classic Only): <input type="checkbox"/> [i]
Federation ID		Debug Mode: <input type="checkbox"/> [i]
App Registration: One-Time Password Authenticator	[i]	High-Contrast Palette on Charts: <input type="checkbox"/> [i]
App Registration: Salesforce Authentication	[i]	Load Lightning Pages While Scrolling: <input checked="" type="checkbox"/> [i]
		Send Apex Warning Emails: <input type="checkbox"/>

Create User-2

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

User Detail: Kol Mikaelson

Role: Worker

User License Profile: Salesforce Platform worker

Active: ✓

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

WDC User:

Mobile Push Registrations: 1624

Data.com User Type:

Accessibility Mode (Classic Only): ⓘ

Debug Mode: ⓘ

High-Contrast Palette on Charts: ⓘ

Load Lightning Pages While Scrolling: ✓ ⓘ

Salesforce CRM Content User: ✓ ⓘ

User Detail Fields:

- Name: Kol Mikaelson
- Alias: Vamsi
- Email: gjgajannalam406@gmail.com [\[Verify\]](#) ⓘ
- Username: gjgajannalam401@gmail.com
- Nickname: User17224342838845710052 ⓘ
- Title:
- Company:
- Department:
- Division:
- Address:
- Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale: English (India)
- Language: English
- Delegated Approver: Manager
- Receive Approval Request Emails: Only if I am an approver
- Federation ID:
- App Registration: One-Time Password Authenticator [\[View\]](#) ⓘ
- App Registration: Salesforce [\[View\]](#) ⓘ

Left Sidebar:

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users** (selected)
- Feature Settings
- Data.com
- Prospector Users

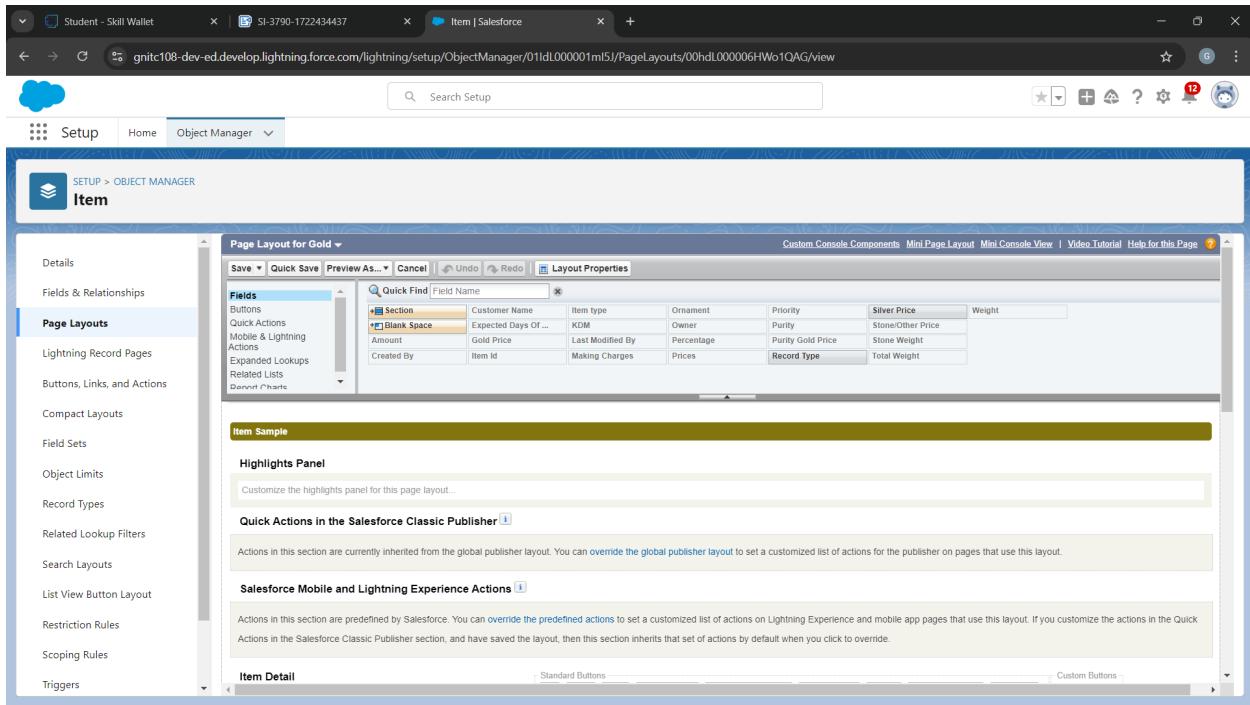
Bottom Message: Didn't find what you're looking for? Try using Global Search.

Task 10 :

Page layouts

Page Layout in Salesforce allows us to customise the design and organise detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

Gold Page layout



Silver Page layout

The screenshot shows the Salesforce Setup interface for the 'Item' object. The left sidebar navigation includes 'Details', 'Fields & Relationships', 'Page Layouts' (which is selected), 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Search Layouts', 'List View Button Layout', 'Restriction Rules', 'Scoping Rules', and 'Triggers'. The main content area is titled 'Page Layout for Silver'. It features a toolbar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. A 'Fields' section displays a table with columns: Field Name, Customer Name, Item type, Ornament, Priority, Silver Price, Weight, Section, Expected Days Of..., KDM, Owner, Purity, Stone/Other Price, Blank Space, Gold Price, Last Modified By, Percentage, Purity Gold Price, Stone Weight, Amount, Created By, Item Id, Making Charges, Prices, Record Type, and Total Weight. Below this is a 'Highlights Panel' with the sub-section 'Quick Actions in the Salesforce Classic Publisher'. It states: 'Actions in this section are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for the publisher on pages that use this layout.' There is also a 'Salesforce Mobile and Lightning Experience Actions' section with a note: 'Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.' At the bottom are sections for 'Standard Buttons' and 'Custom Buttons'.

Task 12 :

Record Types

Record Types are a way of grouping many records of one type for that object. These can be applied to any standard or custom object, and allow you to have a different page layout, fields, required fields, and picklist values. Record types allow administrators to create a different page layout with custom picklist fields and values for the same business process and various business processes.

Create Record Type with name “Gold”

The screenshot shows the Salesforce Setup interface for creating a new Record Type. The URL in the browser is <https://gnitc108-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01dL000001mISJ/RecordTypes/012dL000002KrmzQAC/view>.

The left sidebar navigation menu includes:

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

The main content area displays the Record Type details for "Gold".

Field	Value	Created By	Modified By	Modified Date
Record Type Label	Gold	natam.gajanan	natam.gajanan	31/07/2024, 8:09 pm
Record Type Name	Gold			
Namespace Prefix				
Description	Gold items information			
Created By	natam.gajanan	31/07/2024, 8:09 pm		
Modified By	natam.gajanan	31/07/2024, 8:09 pm		
Active	✓			

Picklists Available for Editing

Action	Field	Modified Date
Edit	Expected Days Of Return	31/07/2024, 8:09 pm
Edit	Item type	31/07/2024, 8:09 pm
Edit	Priority	31/07/2024, 8:09 pm

Create another Record Type with name “Silver”

The screenshot shows the Salesforce Setup interface for creating a new Record Type. The URL in the browser is gnitec108-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01Id000001m5j/RecordTypes/012dL000002Ks4jQAC/view.

The page title is "Item | Salesforce". The left sidebar shows the "Record Types" section selected. The main content area displays the "Record Type Silver" details. The record type is labeled "Silver" and is active. It was created by "nalam_gajanan" on 31/07/2024, 8:15 pm, and modified by the same user on the same date and time.

Below the main details, there is a table titled "Picklists Available for Editing" showing three entries:

Action	Field	Modified Date
Edit	Expected Days Of Return	31/07/2024, 8:15 pm
Edit	Item type	31/07/2024, 8:15 pm
Edit	Priority	31/07/2024, 8:15 pm

Task 13 :

Permission sets

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

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.

Apps
<p>Assigned Apps Settings that specify which apps are visible in the app menu</p> <p>Assigned Connected Apps Settings that specify which connected apps are visible in the app menu</p> <p>Object Settings Permissions to access objects and fields, and settings such as tab availability</p> <p>App Permissions Permissions to perform app-specific actions, such as "Manage Call Centers"</p> <p>Apex Class Access Permissions to execute Apex classes</p> <p>Visualforce Page Access Permissions to execute Visualforce pages</p> <p>External Data Source Access Permissions to authenticate against external data sources</p> <p>Flow Access Permissions to execute Flows</p> <p>Named Credential Access Permissions to authenticate against named credentials</p> <p>Custom Permissions Permissions to access custom processes and apps</p> <p>Custom Metadata Types Permissions to access custom metadata types</p> <p>Custom Setting Definitions Permissions to access custom settings</p>

SETUP

Permission Sets

Permission Set Overview > Object Settings > Items

Items

Tab Settings

Available	Visible
<input checked="" type="checkbox"/>	<input type="checkbox"/>

Item: Record Type Assignments

Record Types	Assigned Record Types
Gold	<input checked="" type="checkbox"/>
Silver	<input checked="" type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

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.

... > PERMISSION SET 'PER TO WORKER' > MANAGE ASSIGNMENT EXPIRATION

Per to Worker

Select Users to Assign

All Users

9 items • Sorted by Full Name • Filtered by All users • Updated a few seconds ago

<input type="checkbox"/>	Full Name ↑	Alias	Username	Role	Acti...	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d5i000003ksyzea4.t4i5wtjeybt4@chatter.salesforce.com	<input checked="" type="checkbox"/>	Chatter Free User	
<input type="checkbox"/>	Integration User	integ	integration@00d5i000003ksyzea4.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration User	
<input type="checkbox"/>	Mani deepak	mdeep	manideepak143@gmail.com	<input checked="" type="checkbox"/>	Worker	
<input type="checkbox"/>	Megha Katoju Site Guest User	guest	megha_katoju@00d5i000003ksyzea4.org.force.com	<input checked="" type="checkbox"/>	Megha Katoju Profile	
<input type="checkbox"/>	Meghana Katoj Site Guest User	guest	meghana_katoj@00d5i000003ksyzea4.org.force.com	<input checked="" type="checkbox"/>	Meghana Katoj Profile	

Cancel **Next**

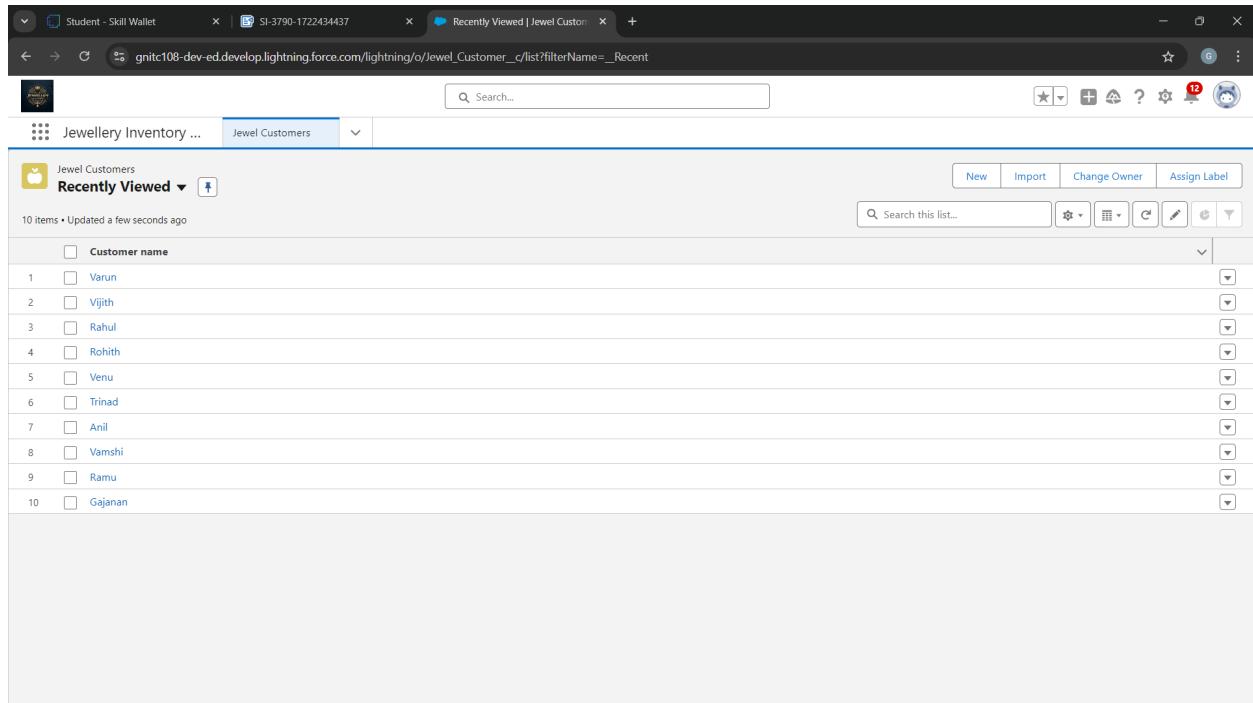
Task 14 :

User Adoption

Use Case:

As a new Administrator, you perform user management tasks like creating and editing users, resetting passwords, granting permissions, configuring data access, and much more. In this unit, you will learn about users and how you add users to your Salesforce org.

Create a Record (Jewel Customer)



The screenshot shows a web browser window with three tabs open. The active tab is titled 'Recently Viewed | Jewel Customer' and displays a list of recently viewed customers. The URL in the address bar is 'gnitc108-dev-ed.lightning.force.com/lightning/o/Jewel_Customer_c/list?filterName=__Recent'. The page header includes the 'Jewellery Inventory ...' navigation item and a 'Jewel Customers' tab. On the right side of the page, there are buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. A search bar at the top right contains the placeholder 'Search...'. Below the search bar are icons for filtering, sorting, and other actions. The main content area lists 10 items under the heading 'Recently Viewed' with the sub-heading 'Customer name'. The list items are numbered 1 through 10 and include names such as Varun, Vijith, Rahul, Rohith, Venu, Trinad, Anil, Vamshi, Ramu, and Gajanan, each preceded by a small checkbox icon.

Customer name
1 Varun
2 Vijith
3 Rahul
4 Rohith
5 Venu
6 Trinad
7 Anil
8 Vamshi
9 Ramu
10 Gajanan

View a Record(Jewel Customer)

The screenshot shows a Salesforce Lightning interface for viewing a customer record. The top navigation bar includes tabs for 'Student - Skill Wallet', 'SI-3790-172244437', and 'Rohith | Jewel Customer | Sales'. The URL in the address bar is https://gnitc108-dev-ed.lightning.force.com/lightning/r/Jewel_Customer__c/a00dL00000l7qqjQAB/view. The page title is 'Jewellery Inventory ...' and the sub-page title is 'Jewel Customers'. A search bar is at the top right.

The main content area displays the 'Details' tab for a 'Jewel Customer' record named 'Rohith'. The record contains the following fields:

Field	Value
Customer name	Rohith
City	Delhi
Phone	9705108059
Email	gajanannalam406@gmail.com
State	Delhi
Street	Varanasi
Country	India
Zip/Postal code	302718
Created By	nalam gajanan , 03/08/2024, 12:02 pm
Last Modified By	nalam gajanan , 03/08/2024, 12:02 pm

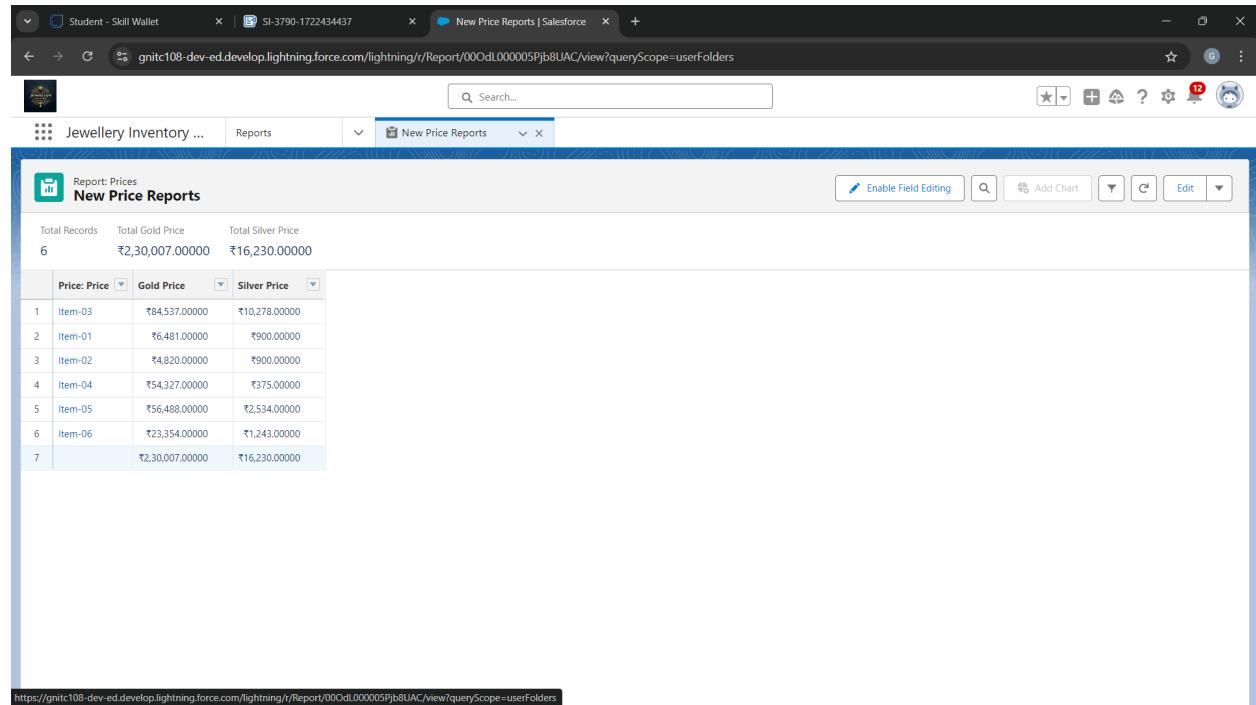
At the bottom left, the URL is repeated: https://gnitc108-dev-ed.lightning.force.com/lightning/r/Jewel_Customer__c/a00dL00000l7qqjQAB/view.

Task 15 :

Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Create Report (New Price Reports)



The screenshot shows a Salesforce report titled "Report: Prices New Price Reports". The report displays a table with the following data:

	Price: Price	Gold Price	Silver Price
1	Item-03	₹84,537.00000	₹10,278.00000
2	Item-01	₹6,481.00000	₹900.00000
3	Item-02	₹4,820.00000	₹900.00000
4	Item-04	₹54,327.00000	₹375.00000
5	Item-05	₹56,488.00000	₹2,534.00000
6	Item-06	₹23,354.00000	₹1,243.00000
7		₹2,30,007.00000	₹16,230.00000

The report also shows summary statistics at the top:

- Total Records: 6
- Total Gold Price: ₹2,30,007.00000
- Total Silver Price: ₹16,230.00000

The URL of the report is: <https://gnitc108-dev-ed.lightning.force.com/lightning/r/Report/00OdL000005Pjb8UAC/view?queryScope=userFolders>

Create Report (New Billings With Item Report)

The screenshot shows a Salesforce Lightning interface with a report titled "Report: Billings with Item New Billings with Item Report". The report displays 6 total records. The columns are "Billing: Billing" and "Item: Item Id". The data is as follows:

	Billing: Billing	Item: Item Id
1	Item-04	Item-02
2	Item-03	Item-06
3	Item-05	Item-03
4	Item-02	Item-04
5	Item-01	Item-04
6	Item-06	Item-05

Create Report (Billings with Items and Customer Order)

The screenshot shows a Salesforce Lightning interface with a report titled "Report: Items with Customer Orders and Customer Billings with item and Customer order". The report displays 6 total records. The columns are "Item: Item Id", "Customer Order: Customer Order Id", and "Customer: Customer name". The data is as follows:

	Item: Item Id	Customer Order: Customer Order Id	Customer: Customer name
1	Item-04	Item-06	Vijith
2	Item-06	Item-02	Venu
3	Item-05	Item-03	Rohith
4	Item-03	Item-04	Rohith
5	Item-03	Item-01	Varun
6	Item-04	Item-05	Varun

Task 16 :

Creating Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

The screenshot shows a Salesforce dashboard titled "Dashboard1". The dashboard contains three reports:

- New Price Reports**: A table showing price comparisons between Gold and Silver for six items. The data is as follows:

Price: Price ↑	Gold Price	Silver Price
Item-01	₹6,48100k	₹900,00000
Item-02	₹4,82000k	₹900,00000
Item-03	₹84,53700k	₹10,27800k
Item-04	₹54,32700k	₹375,00000
Item-05	₹56,48800k	₹2,53400k
Item-06	₹23,35400k	₹1,24300k

[View Report \(New Price Reports\)](#)

- Billings with item and Customer order**: A table showing billings with item and customer order details. The data is as follows:

Item: Item Id ↑	Customer Order: Customer Order Id	Customer: Customer name
Item-03	Item-04	Rohith
Item-03	Item-01	Varun
Item-04	Item-06	Vijith
Item-04	Item-05	Varun
Item-05	Item-03	Rohith
Item-06	Item-02	Venu

[View Report \(Billings with item and Customer order\)](#)

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

Billing: Billing ↑	Item: Item Id
Item-01	Item-04
Item-02	Item-04
Item-03	Item-06
Item-04	Item-02
Item-05	Item-03
Item-06	Item-05

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

Task 17 :

Flows

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

