

A CRM APPLICATION FOR JEWEL MANAGEMENT

By

L. Hemanth Kumar

224g5a3305@srit.ac.in

PROJECT ABSTRACT

A CRM Application for Jewel Management

The "CRM Application for Jewel Management" project aims to develop a sophisticated Customer Relationship Management (CRM) system tailored specifically for the jewelry industry. This application is designed to streamline the management of customer interactions, sales, and inventory, providing jewelers with a comprehensive tool to enhance customer service and operational efficiency. By integrating features such as customer profiles, purchase history, and personalized communication channels, the CRM application enables jewelers to deliver a more personalized shopping experience and build stronger, long-term relationships with their clientele.

In addition to its customer-focused functionalities, the application offers robust inventory management capabilities, allowing jewelers to track stock levels, manage suppliers, and analyze sales trends. The system's reporting and analytics tools provide valuable insights into sales performance and market trends, empowering businesses to make data-driven decisions and optimize their strategies. Overall, the CRM Application for Jewel Management is poised to transform how jewelers interact with their customers and manage their operations, driving growth and enhancing the customer.

INDEX PAGE

Topics	Page no
1. Salesforce	4 - 7
2. Object	8 - 14
3. Tabs	15 - 17
4. The Lightning App	18 - 19
5. Fields	20 – 29
6. Profiles	29 – 31
7. Roles	31- 35
8. Users	35– 37
9. Page Layouts	37 – 39
10. Record types	39– 41
11. Permission Sets	41– 42
12. User Adoptions	42– 43
13. Reports	44 – 45

14.Dashboards 45-50

15.Flows 50-53

1. 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 organized something like this:

<https://youtu.be/r9EX3lGde5k>

SALESFORCE:-

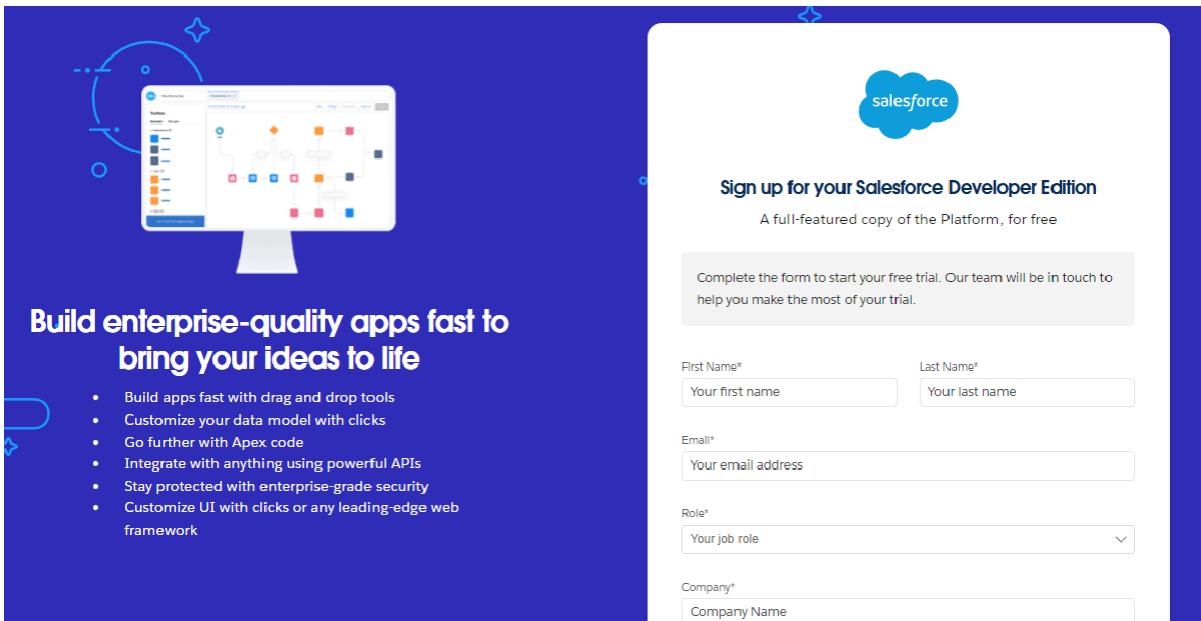
- Creating Developer Account
- Account Activation

TASK 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 :



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

Username : should be a combination of your name and company

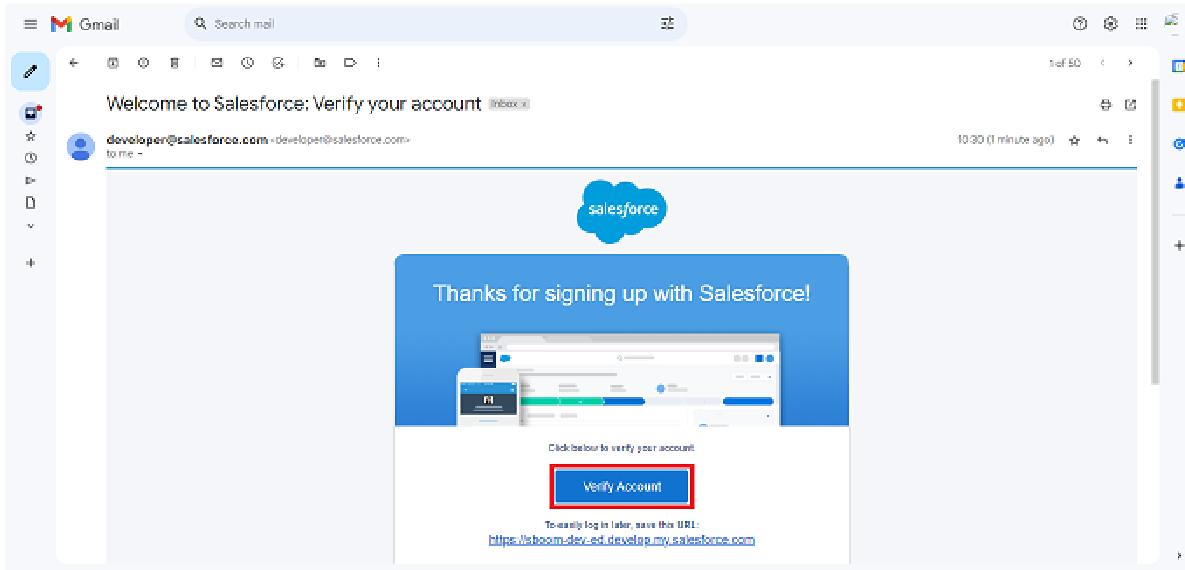
This need not be an actual email id, you can give anything in the format :

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 verifyaccount 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 changepassword.

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

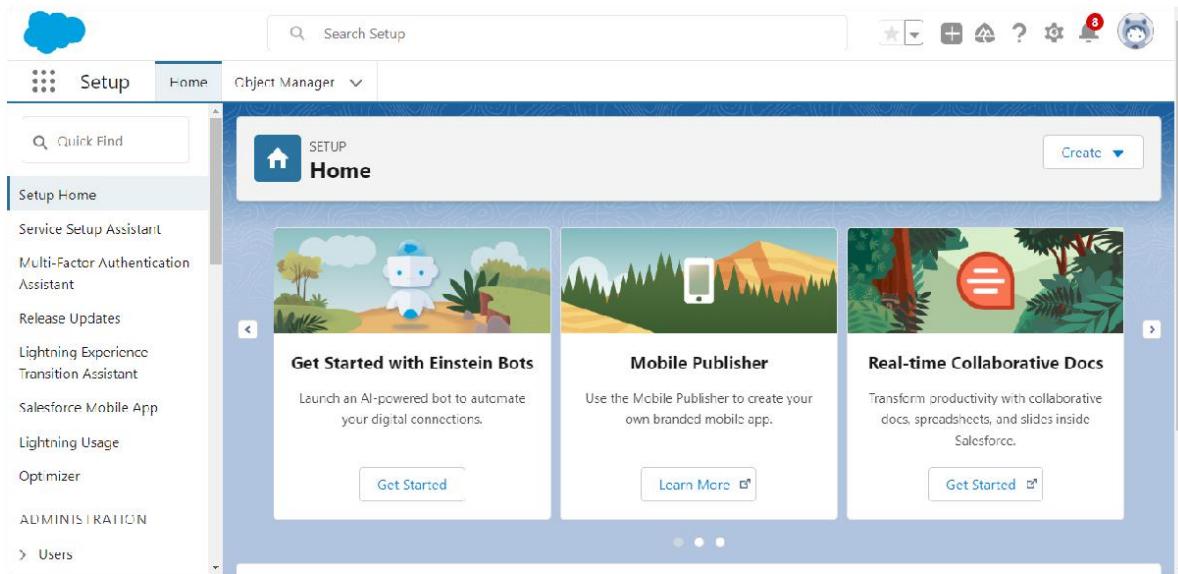
* Confirm New Password
..... Match

Security Question
▼ In what city were you born?

* Answer
asdfghjkl

Change Password

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



2. Object

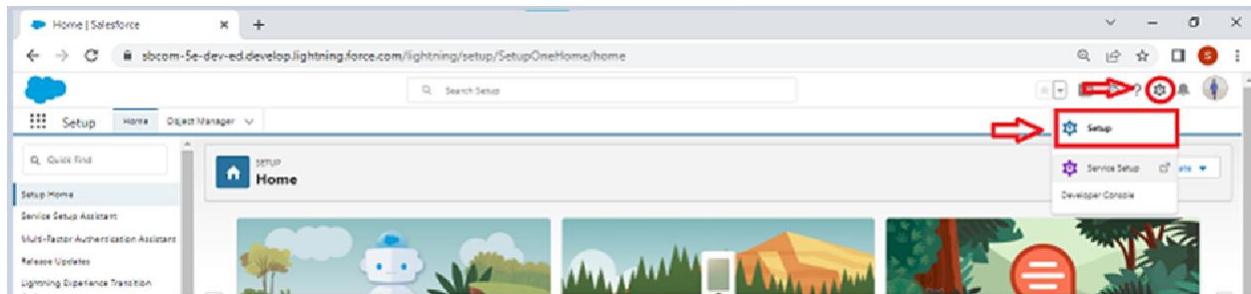
INTRODUCTION :-

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? Salesforce objects are of two types:

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

To Navigate to Setup page: Click on gear icon ? click setup.



Objects and fields involved in Co-Living:

OBJECT :-

- Create a custom object for Customer
- Create a custom object for Customer Order
- Create a custom object for Price
- Create a custom object for Billing

- Create a custom object for Item

TASK 1 :- Create a custom object for JewelCustomer

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as "Jewel Customer".
4. Fill in the plural label as "Jewel Customers".
5. Record name: "Customer name"
6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports .
8. In the Deployment Status section, ensure Deployed is selected.
9. In the Search Status section, select Allow Search.
10. Leave everything else as is, and click Save.

Enter Record Name Label and Format

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

Record Name	<input type="text" value="Customer"/>	Example: Account Name
Data Type	<input type="text" value="Text"/>	<input type="button" value="▼"/>

Optional Features

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

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

In Development
 Deployed

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.

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

Task-3:-Tabs

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

Types of Tabs:

1. Custom Tabs

Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

2. Web Tabs

Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.

3. Visualforce Tabs

Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

4. Lightning Component Tabs

Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

5. Lightning Page Tabs

Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

Use Case:

Creating Objects and storing Jewels data is the very first step in the requirements they want. Now to access the stored data by an Owner (Gold Smith) in the organisation Admin needs to create Tabs. By designing a dedicated Tab, businesses can improve user experience, simplify navigation, and provide quick access to critical information, enhancing productivity and ensuring efficient utilisation of Salesforce's capabilities.

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)

Custom Tabs

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

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external pages. Lightning Component tabs allow you to add Lightning components to the navigation bar. You can also use Lightning Pages to add Lightning Experience and the mobile app.

Custom Object Tabs

[New](#) [What Is This?](#)

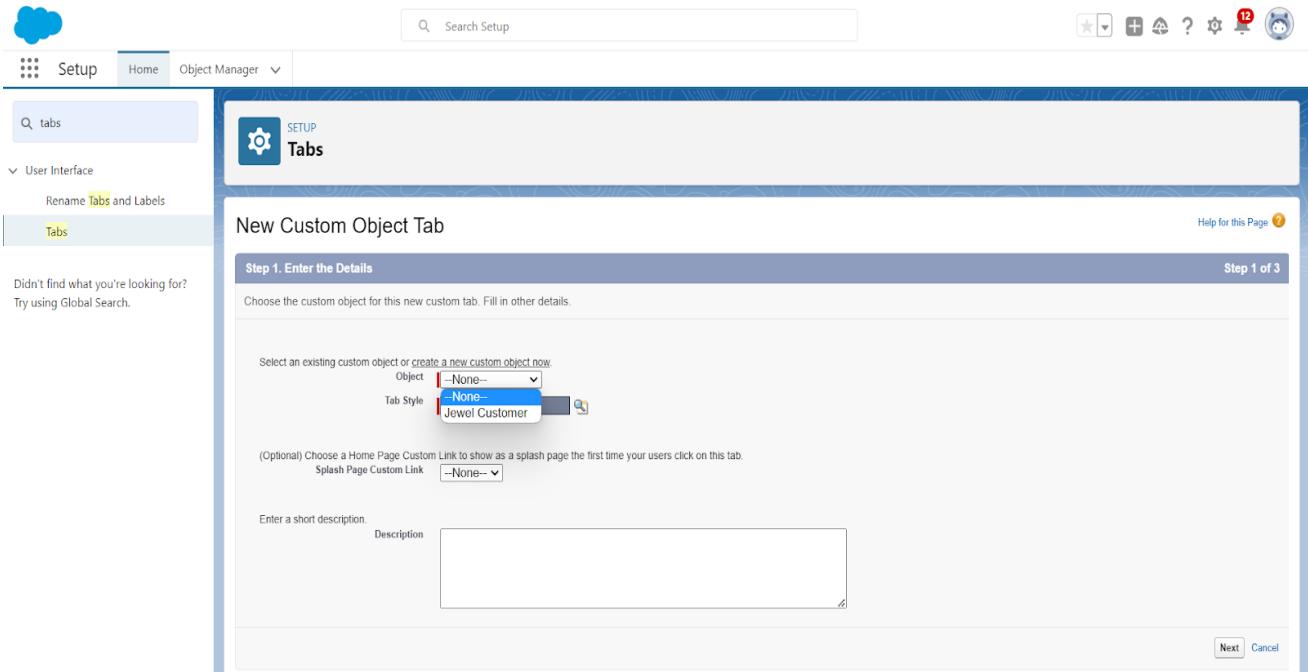
No Custom Object Tabs have been defined

Web Tabs

[New](#) [What Is This?](#)

No Web Tabs have been defined

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.

Task-4 : 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.

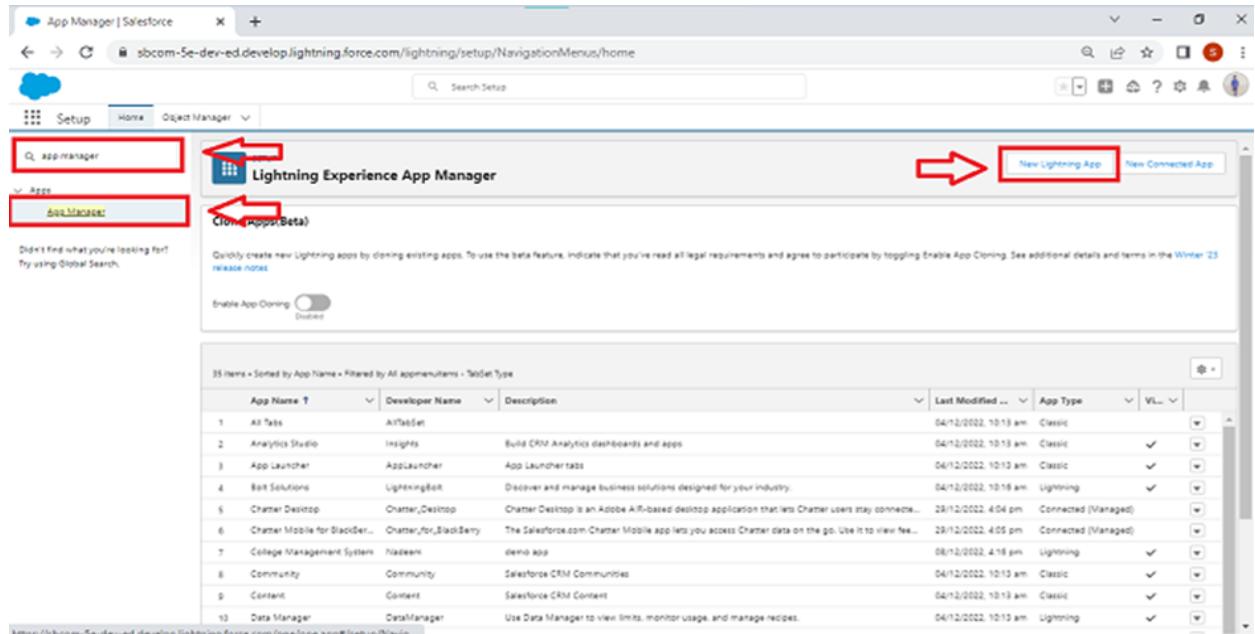
Use Case:

Well done you have reached close to your requirement by creating the objects to store the organization's data. Making a database for an organization is just not enough to reach out the requirements, the task is how the users at the organization can access the objects you have created for them. As an Admin for the organization it's your duty to make sure every user of the organization is able to access the data modelling structure.

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.



- Fill the app name in app details and branding as follow

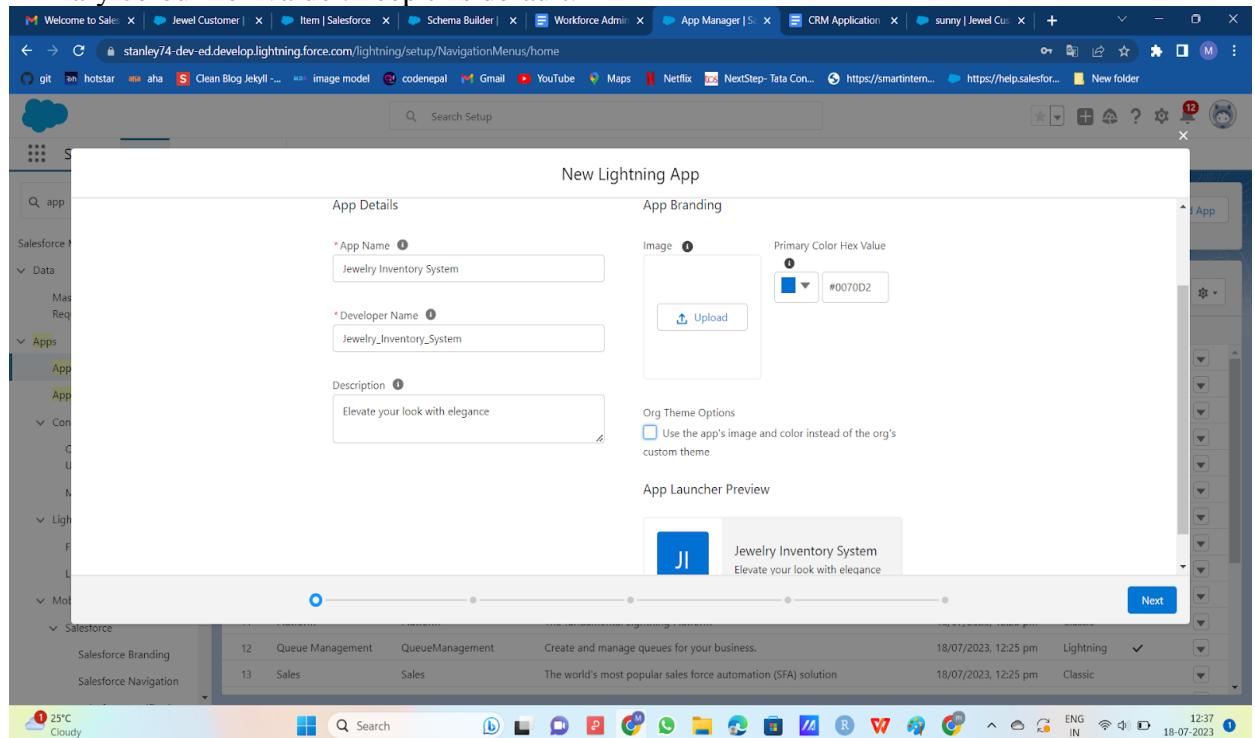
App Name : Jewellery Inventory System.

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.



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

App Options

Navigation and Form Factor

- Standard navigation
- Console navigation

Supported Form Factors

- Desktop and phone
- Desktop
- Phone

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

5.To Add Navigation Items:

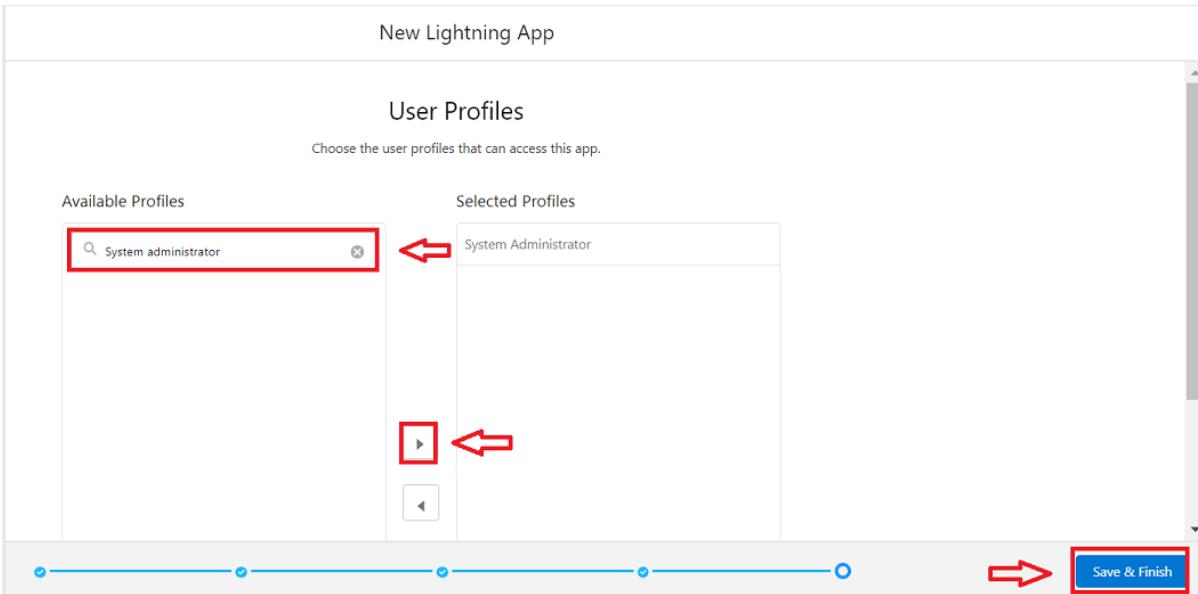
Navigation Items

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
Accounts	Jewel Customers
Alert Settings	Items
All Sites	Customer Orders
Alternative Payment Methods	Prices
App Launcher	Billings
Appointment Invitations	Reports
Approval Requests	Dashboard
Asset Action Sources	
Asset Actions	
Asset Services	

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.

Task5: 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 :

1. Standard Fields
2. 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.

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.

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.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. In the top right corner, there is a search bar containing the text 'jewel'. A red arrow points to this search bar. Below it, the results table has one item listed: 'jewel Customer' (Label), 'Jewel_Customer__c' (API Name), 'Custom Object' (Type), and '7/18/2023' (Last Modified). A red arrow also points to the 'jewel Customer' label in the table.

2. Now click on “Fields & Relationships” ? New

The screenshot shows the 'Fields & Relationships' section for the 'Jewel Customer' object. On the left, there are navigation links: Details, Fields & Relationships (which is highlighted with a red box), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions. On the right, there is a table of fields. A red arrow points to the 'New' button at the top right of the table. The table includes columns for Field Label, API Name, Type, and Description.

3. Select Data type as “Text”.

The screenshot shows a list of data type options. The 'Text' option is selected and highlighted with a red box. Other options include 'Picklist', 'Picklist (Multi-Select)', 'Text Area', and 'Text Area (Long)'. Each option has a brief description to its right.

- Picklist Allows users to select a value from a list you define.
- Picklist (Multi-Select) Allows users to select multiple values from a list you define.
- Text Allows users to enter any combination of letters and numbers.
- Text Area Allows users to enter up to 255 characters on separate lines.
- Text Area (Long) Allows users to enter up to 131,072 characters on separate lines.

4. Click on Next

The screenshot shows the 'Step 2. Enter the details' screen for creating a new custom field. The 'Field Label' is set to 'City' (highlighted with a red box). The 'Length' is set to '20' (highlighted with a red box). The 'Field Name' is also set to 'City'. The top right corner shows 'Step 2 of 4'.

5. Fill the above as following:

- o Field Label: City
- o Length : 20

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

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”.

Jewel Customer
New Custom Field
Step 2: Enter the details
Field Label: PPhone
Field Name: PPhone
Description:
Help Text:
Required: Always require a value in this field in order to save a record.
 Add this field to existing custom report types that contain this entity.
Default Value: Show Formula Editor
Step 2 of 4
Previous Next Cancel

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”.

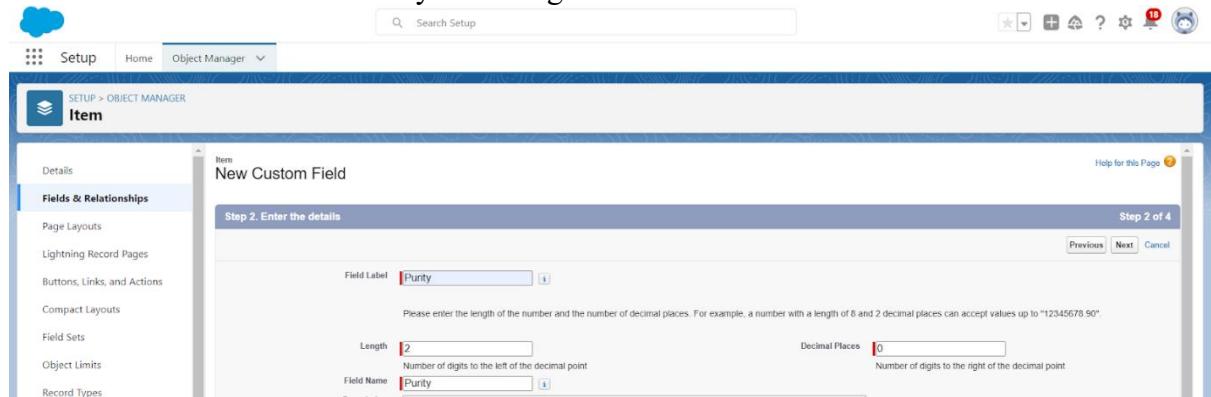
Jewel Customer
Step 2: Enter the details
Field Label: Email
Field Name: Email
Description:
Help Text:
Required: Always require a value in this field in order to save a record.
 Add this field to existing custom report types that contain this entity.
Default Value: Show Formula Editor
Step 2 of 4
Previous Next Cancel

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 “Number” and click Next.
4. Given the Field Label as “ Purity” and length as “ 2 ”.

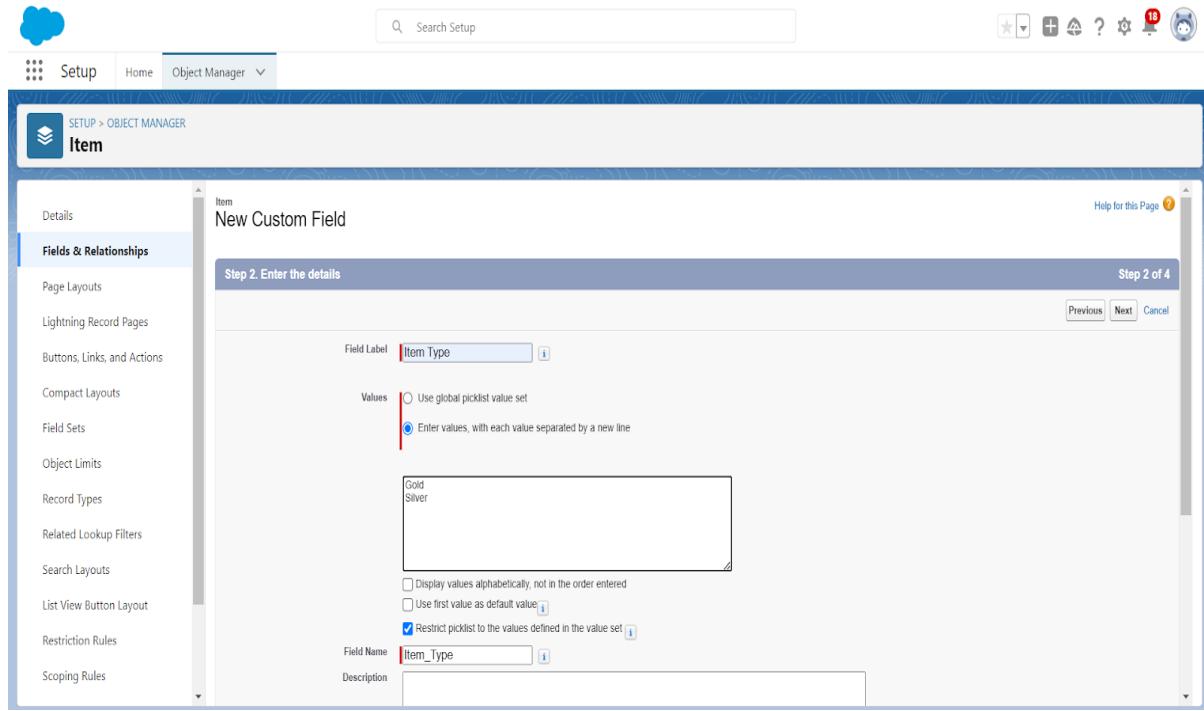


5. Field Name will be auto populated, and click on Next >> Next >> Save.

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.

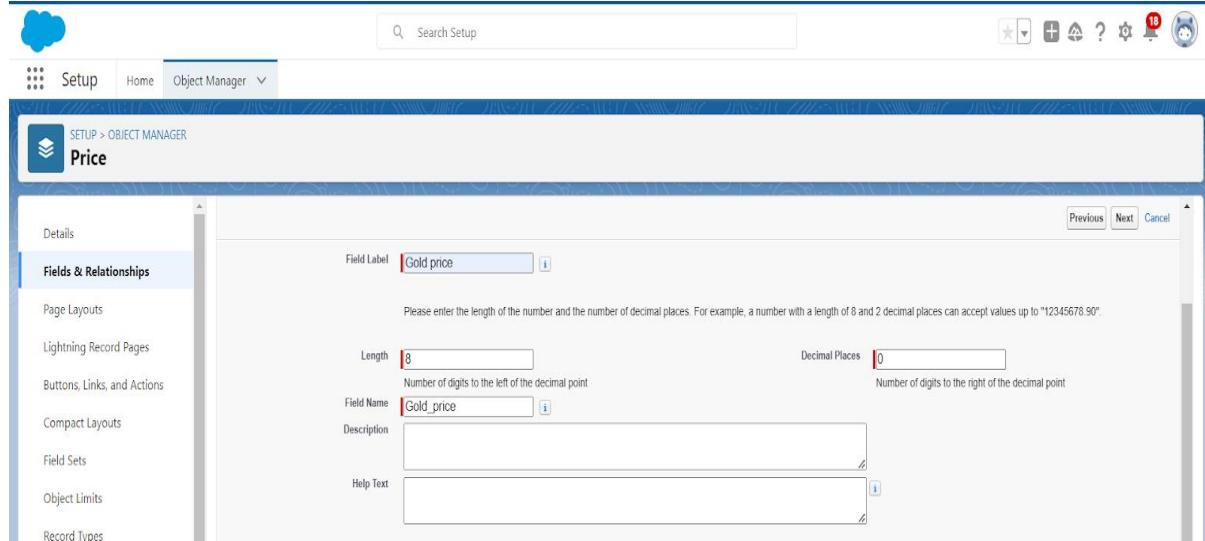


6. Click Next >> Next >> Next >> Save .

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.



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 .

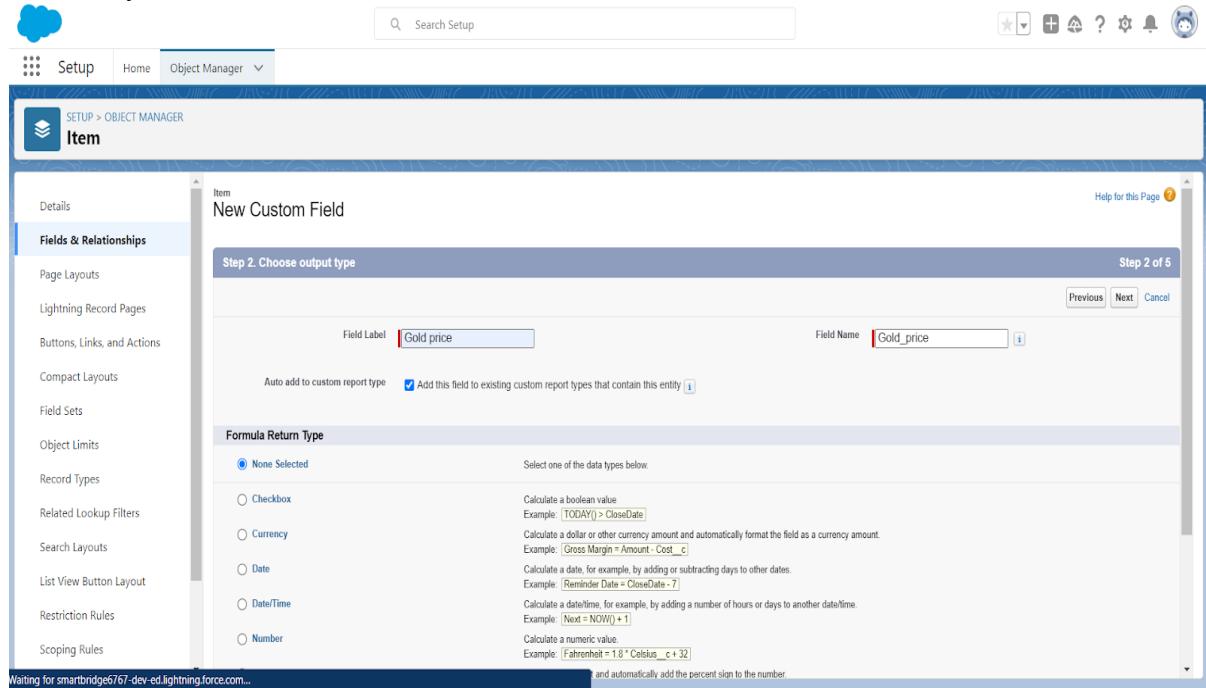
Creating Formula Field(Cross Object) in Item Object

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.

1. Now click on “Fields & Relationships” >> New.
2. Select Data type as “Formula” and click Next.
3. Give Field Label and Field Name as “Gold Price” and select formula return type as “Currency” and click next.



4. Under Advanced Formula write down the formula: Prices__r.Gold_price__c / 10.

5. 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"> <thead> <tr> <th>Field Name</th><th>Data type</th></tr> </thead> <tbody> <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> </tbody> </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)											

2	Price	
	Silver Price	Currency (Length=8,Decimal=5)

3	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; margin-top: 10px;"> 1-3 Days 4-5 Days 6-7 Days 8-10 Days </div>
		Priority	Picklist <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> Low Medium High Critical </div>
		Silver Price	Formula (Return Type:Number) (Decimal=3) <div style="border: 1px solid black; padding: 10px; margin-top: 10px;"> (Prices__r.Silver_price__c / 1000) </div>
		Purity Gold Price	Formula (Return Type:Currency) (Decimal=2) <div style="border: 1px solid black; padding: 10px; margin-top: 10px;"> ((Prices__r.Gold_price__c * Purity__c) / 24) / 10 </div>

	Total Weight	Formula (Return Type:Number) (Decimal=3)
		<div style="border: 1px solid black; padding: 5px; text-align: center;">(Weight_c - Stone_weight_c)</div>
	Amount	Formula (Return Type:Currency) (Decimal=3)
		<div style="border: 1px solid black; padding: 5px; text-align: center;">IF(ISPICKVAL(Item_Type_c , "Gold"), Total_weight_c * Purity_Gold_price_c , Total_weight_c * Silver_price_c)</div>
	KDM	Formula (Return Type:Currency) (Decimal=0)
		<div style="border: 1px solid black; padding: 5px; text-align: center;">(Amount_c * Percentage_c) / 100</div>
	Making Charges	Formula (Return Type:Currency) (Decimal=0)
		<div style="border: 1px solid black; padding: 5px; text-align: center;">IF(ISPICKVAL(Item_Type_c ,"Gold"), Weight_c * 300 , Weight_c * 10)</div>

4	Customer Order	Order Status	Picklist
			<div style="border: 1px solid black; padding: 5px; text-align: center;">Started Not Started On Hold Completed Not Completed</div>

5	Billi ng	Field Label:Item	Lookup Relationship with Item Object
---	-------------	---------------------	---

	Ornament	Formula (Return Type:Text)
		Item__r.Ornament__c
	Stone weight	Formula (Return Type:Number) (Decimal=2)
		Item__r.Stone_weight__c
	Weight	Formula Return Type:Number (Decimal=2)
		Item__r.Total_weight__c
	Amount	Formula (Return Type:Currency) (Decimal=2)
		Item__r.Amount__c
	Gold/Silver Price	Formula (Return Type:Currency) (Decimal=2)
		IF(ISPICKVAL(Item__r.Item_Type__c , "Gold"), Item__r.Gold_price__c , 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

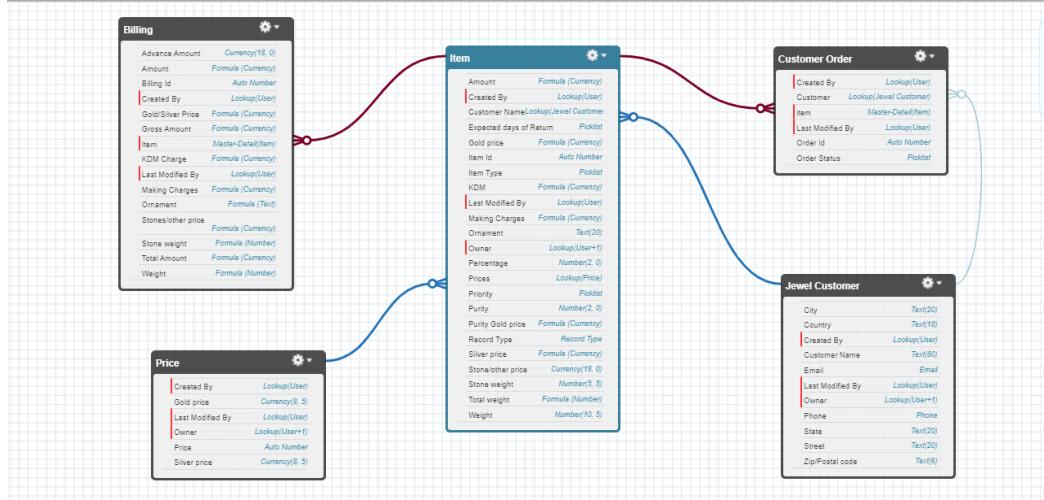
		<p>Total Amount</p> <p>(Return Type:Currency)</p> <p>Formula (Decimal=0)</p> <div style="border: 1px solid black; padding: 5px;"> <p>Amount_c + KDM_Charge_c + Stones_other_price_c + Making_Charges_c</p> </div>
--	--	---

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.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' for the 'Item' object. The 'Fields & Relationships' tab is active. On the right, the 'Field Information' section is displayed, showing details like Field Label (Priority), Field Name (Priority), API Name (Priority__c), Data Type (Picklist), and Created By (meghana.katou). Below this, the 'General Options' and 'Picklist Options' sections are shown. At the bottom of the page, there is a 'Field Dependencies' button, which is highlighted with a red box and has a red arrow pointing to it.

4. Select Controlling Field as “Priority” and Depending field as “Expected Days of Return”>>Continue.

The screenshot shows the 'New Field Dependency' setup page. It includes instructions for creating a dependent relationship. Step 1: Select a controlling field and a dependent field. 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. The main area contains two dropdown menus: 'Controlling Field' (set to 'None') and 'Dependent Field' (set to 'None').

5. Select the “Expected Days of Return” values of related Priority values and Click on Include Values >> Save.

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(

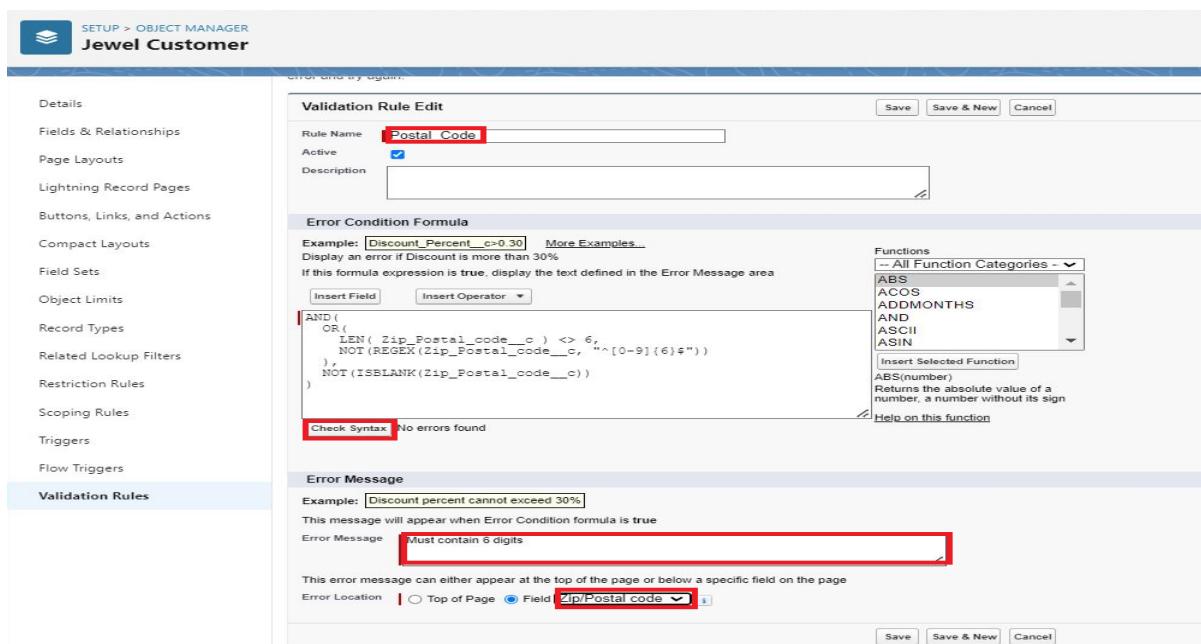
LEN(Zip_Postal_code__c) <> 6,

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.

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.

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.

Task6: 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.

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

We cannot deleted standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

2. Custom Profiles:

Custom ones defined by us.

They can be deleted if there are no users assigned with that particular one.

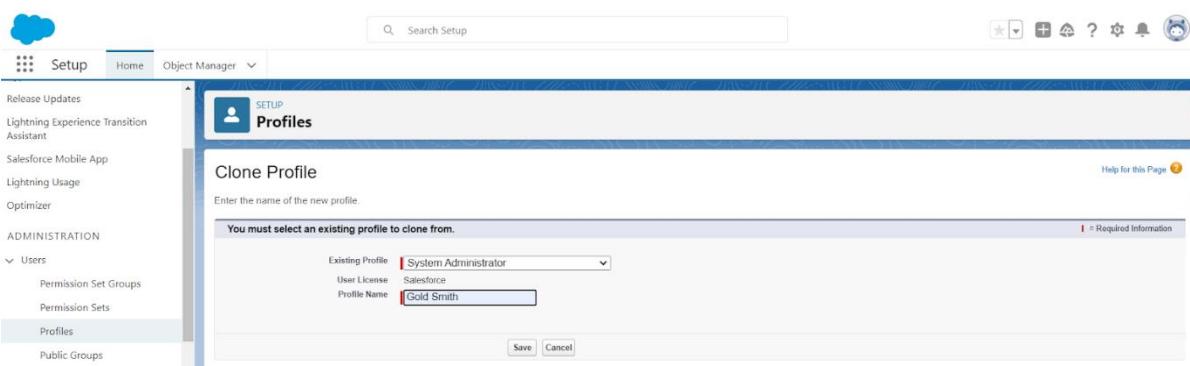
Use Case:

Great work Admin, you have done so good till now. The GoldSmith wants to differentiate the users based on their functionalities, position and based on this those users need to have the minimum access to the database object in the organisation. Now it's time to use your Admin skills to focus on the users, their functionality and position in the organisation in order to achieve the Goldsmith Smith requirements.

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 .

The screenshot shows the 'Custom Object Permissions' section under the 'Profiles' tab in the Salesforce setup. It displays two tables of permissions for various objects.

Object	Basic Access					Data Administration	
	Read	Create	Edit	Delete	View All	Modify All	
Assets	<input type="checkbox"/>						
Asset Services	<input type="checkbox"/>						
Billings	<input checked="" type="checkbox"/>						
Book1	<input type="checkbox"/>						
Book2	<input type="checkbox"/>						
Bot Commands	<input type="checkbox"/>						
Brokers	<input type="checkbox"/>						
Buyers	<input type="checkbox"/>						
Candidates	<input type="checkbox"/>						
Customer Orders	<input checked="" type="checkbox"/>						

Object	Basic Access					Data Administration	
	Read	Create	Edit	Delete	View All	Modify All	
Items	<input checked="" type="checkbox"/>						
Jewel Customers	<input checked="" type="checkbox"/>						
Job Applications	<input type="checkbox"/>						
Job Postings	<input type="checkbox"/>						
Job Posting Sites	<input type="checkbox"/>						
Positions	<input type="checkbox"/>						
Prices	<input checked="" type="checkbox"/>						
Projects	<input type="checkbox"/>						
ProjectTasks	<input type="checkbox"/>						
Properties	<input type="checkbox"/>						

4. Scroll down and Click on Save.

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.

Task7: 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.

Use Case:

You have successfully fulfilled the 1st requirement i.e., differentiating the users based on the functionality. Now comes the 2nd task of differentiating the users based on their position, using your excellent admin skills and expanding the custom roles for the organisation and assigning it to the users.

Creating Gold Smith Role

1. From setup >> Go to quick find >> Search for Roles >> click on set up roles.

The screenshot shows the Salesforce Setup Roles page. The left sidebar has a search bar and navigation sections for Users, Roles, Feature Settings, Sales, Service, and Case Teams. The main content area is titled 'Understanding Roles' with a sub-section 'Sample Role Hierarchy'. It shows a hierarchical tree starting from 'Executive Staff' (CEO, President, CFO, VP, Sales) which branches into 'Western Sales Director' (Director, VP, Sales), 'Eastern Sales Director' (Director, VP, Sales), and 'International Sales Director' (Director, VP, Sales). These further branch into 'Western Sales Rep' (CA Sales Rep, OR Sales Rep), 'Eastern Sales Rep' (NY Sales Rep, MA Sales Rep), and 'International Sales Rep' (Asian Sales Rep, European Sales Rep). A legend on the right explains the icons: a person for View & edit data, a chart for Roll up forecasts & generate reports, and a lock for Can't access data of other Executive Staff. There are 'Set Up Roles' and 'Don't show this page again' buttons at the bottom.

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

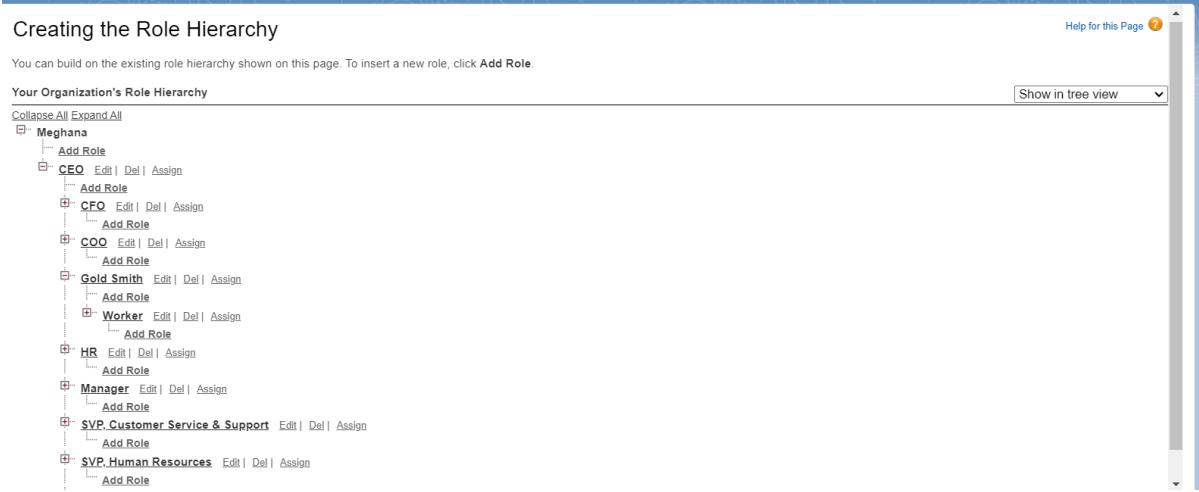
The screenshot shows the 'Your Organization's Role Hierarchy' page. The tree structure starts with 'Nick Enterprises' which contains 'Add Role', 'CFO' (with Edit, Del, Assign buttons), 'HR' (with Edit, Del, Assign buttons), 'Manager' (with Edit, Del, Assign buttons), 'On Site Emp' (with Edit, Del, Assign buttons), and 'Remote Emp' (with Edit, Del, Assign buttons). The 'Add Role' button under each category is highlighted with a red box.

3. Give Label as “Gold Smith” and Role name gets auto populated. Check to whom this role (Gold Smith) reports. Then click on Save.

The screenshot shows the 'Role Edit' page for 'Gold Smith'. The 'Role Edit' section includes fields for 'Label' (set to 'Gold Smith'), 'Role Name' (auto-filled as 'Gold_Smith'), 'This role reports to' (set to 'CEO'), and 'Role Name as displayed on reports' (set to 'Gold Smith'). At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

Note:

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



Task8: 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.

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. Each user account contains at least the following:

- Username
- Email Address
- User's First Name (optional)
- User's Last Name
- Alias
- Nickname
- Licence
- Profile
- Role (optional)

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

The screenshot shows the Salesforce Setup interface under the 'Users' section. A user named 'Niklaus Mikaelson' is being edited. The 'Role' field is set to 'Gold Smith', 'User License' to 'Salesforce', and 'Profile' to 'Gold Smith', all of which are highlighted with red boxes. Other fields like First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, and various checkboxes for Marketing User, Offline User, Knowledge User, How User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Data.com User Type are visible.

3. Save.

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.

Note:

Create two more users as mentioned in activity 2 using the same profile.

Task9: 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.

Use Case:

Hurray!! you have completed the data model structure for your organisation but while looking at the detailed and edit pages it seems to be so clumsy, so decide to organise the page in a pleasant way for the sake of good and pleasant appearance and assemble all different kinds of information in different sections in order.

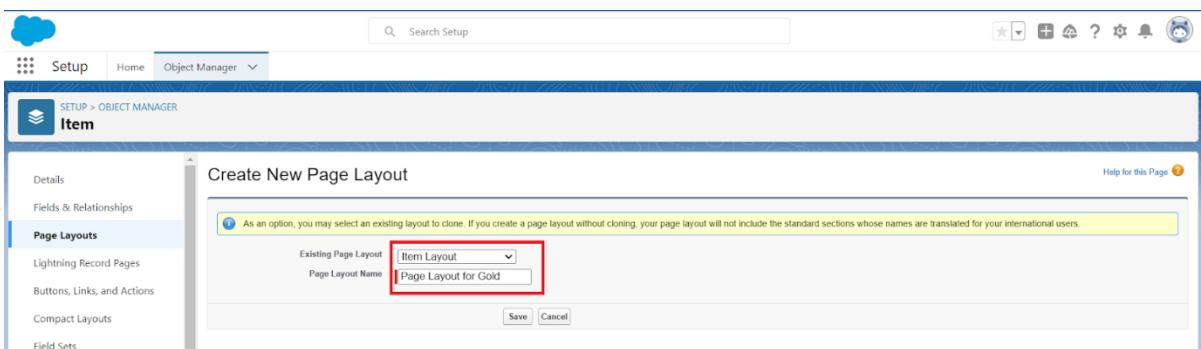
To Create a Gold Page layout

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.



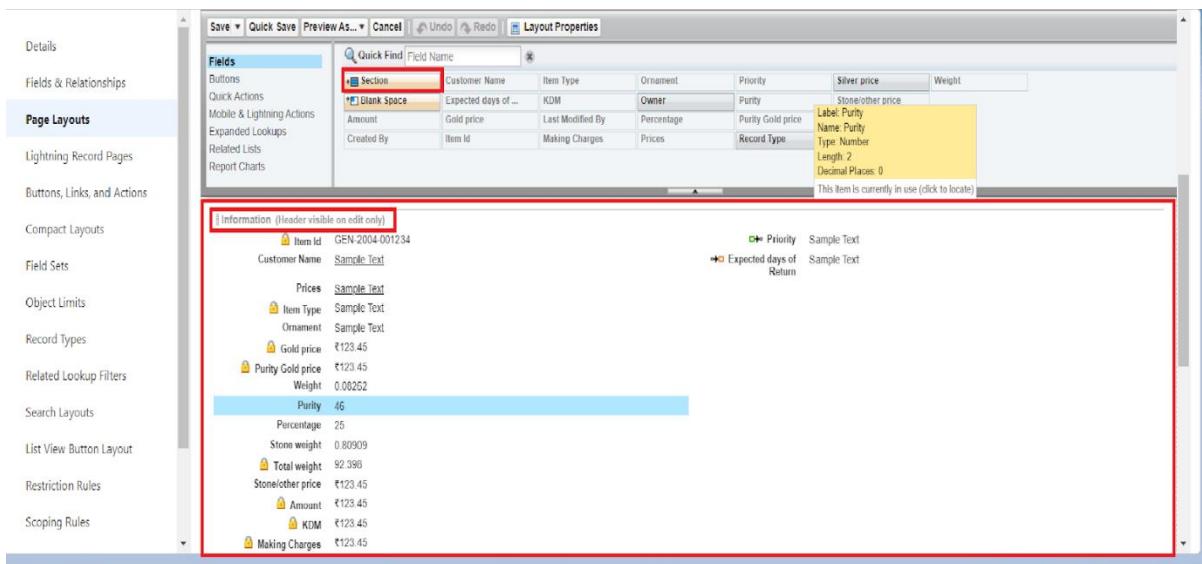
The screenshot shows the Salesforce Object Manager for the 'Item' object. The 'Page Layouts' tab is selected. The list view displays one item: 'Item Layout'. The 'Created By' column shows 'meghana katoju, 6/29/2023, 10:48 PM' and the 'Modified By' column shows 'meghana katoju, 7/18/2023, 11:45 AM'. The top right of the list view has a 'New' button, which is highlighted with a red box.

3. Give Page layout Name as “Page Layout for Gold” and click on Save.



The screenshot shows the 'Create New Page Layout' dialog box. On the left, the navigation bar includes 'Setup', 'Home', and 'Object Manager'. The 'Page Layouts' tab is selected. The main area shows a message about cloning layouts. Below it, there are two input fields: 'Existing Page Layout' (set to 'Item Layout') and 'Page Layout Name' (set to 'Page Layout for Gold'). At the bottom are 'Save' and 'Cancel' buttons. A red box highlights the 'Page Layout Name' input field.

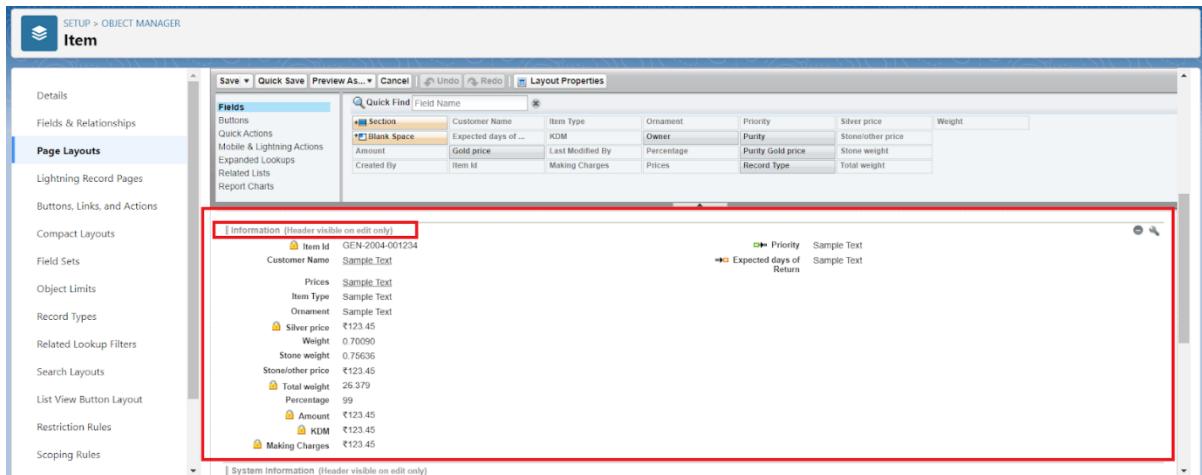
4. Arrange the field as shown in the Information Section ,remove fields which are related to Silver and click Ok.



5. Click Save.
6. Make sure your page layout looks like the picture above.

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.



Task10: 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.

Use Case:

All things done for the organisation. But some of the organisations feel it difficult to fill up all the details while creating a record, so GoldSmith assigned you a task to create different forms for Gold and Silver records based on their mode of work. As an Admin, you know how to achieve this.

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.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	meghana katoju, 7/18/2023, 11:45 AM
Silver	Silver items information	✓	meghana katoju, 7/18/2023, 11:45 AM

3. Select Existing Record as “Master”, Record type Label as “Gold”, Description as “Gold items information”.

Record Type Label	Gold
Record Type Name	Gold
Namespace Prefix	
Description	Gold items information
Active	<input checked="" type="checkbox"/>

4. Uncheck for “Make Available”.

Profile Name	Record Types Currently Available	<input type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Analytics Cloud Integration User		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter External User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter Free User		<input type="checkbox"/>	<input type="checkbox"/>

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 interface under Object Manager. On the left, a sidebar lists various configuration categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Item' and shows a table of record types. A red box highlights the 'Make Available' checkboxes for four specific profiles: 'Gold Smith', 'J Worker1', 'J Worker2', and 'J WORKER3'. These profiles are grouped under the 'Identity User' category. Other profiles listed include Customer Portal Manager Standard, External Apps Login User, External Identity User, Force.com - App Subscription User, Force.com - Free User, Gold Partner User, HR, HR Recruiter, Manager, Marketing User, Minimum Access - Salesforce, and Partner Ann Subscription User. Each profile has a status column indicating 'Gold (Default) Silver'.

Force.com - Free User	Item Layout ▾
Gold Partner User	Item Layout ▾
Gold smith	Page layout for Gold ▾
High Volume Customer Portal	Item Layout ▾
High Volume Customer Portal User	Item Layout ▾
HR	Item Layout ▾
HR Recruiter	Item Layout ▾
Identity User	Item Layout ▾
Manager	Item Layout ▾
Marketing User	Item Layout ▾
Minimum Access - Salesforce	Item Layout ▾
Partner App Subscription User	Item Layout ▾
Partner Community Login User	Item Layout ▾
Partner Community User	Item Layout ▾
Read Only	Item Layout ▾
s1	Item Layout ▾
Salesforce API Only System Integrations	Item Layout ▾
Sales User	Item Layout ▾
Sales User.	Item Layout ▾
Silver Partner User	Item Layout ▾
Solution Manager	Item Layout ▾
Standard Platform User	Item Layout ▾
Standard User	Item Layout ▾
...	

Note: Create another Record Type with name “Silver” following the steps from Activity1(Use page layout for Silver).

Task11: 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.

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 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.

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download Salesforce from the App Store or Google Play: [iOS](#) | [Android](#)

[All Permission Sets](#) | [Edit](#) | [Delete](#) | [Create New View](#)

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Adding Employee		
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products and categories, ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts a...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Conn...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that u...	Service Cloud Voice User

2. Enter the label name as “Per to Worker”, API will be auto populated >> save.

Clone: Per to Worker

Enter a new label and description for the cloned permission set.

Enter permission set information	
Label	<input type="text" value="Per to Worker"/>
API Name	<input type="text" value="Per_to_Worker"/>
Description	<input type="text"/>
Session Activation Required	<input type="checkbox"/>
License	<input type="text"/>

[Save](#) [Cancel](#)

3. Under Apps Select object settings.

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sources

Flow Access
Permissions to execute Flows

Named Credential Access
Permissions to authenticate against named credentials

Custom Permissions
Permissions to access custom processes and apps

Custom Metadata Types
Permissions to access custom metadata types

Custom Setting Definitions
Permissions to access custom 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.

Permission Sets

Permission Set Overview > Object Settings ▾ Items ▾

Items Save Cancel

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.

Current Assignments

Add Assignment

.. > 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

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

Cancel Next

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

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

Cancel Next

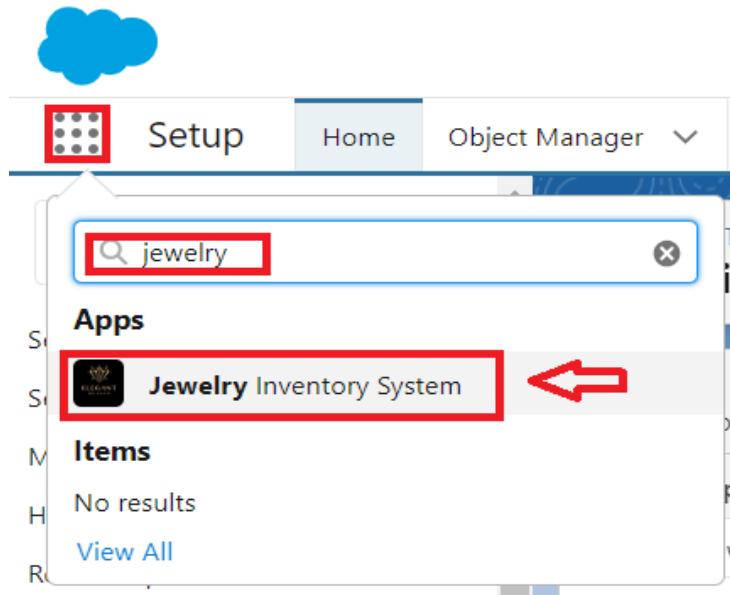
Task12: User Adoption

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)

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.

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)

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.

Task13: 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.

Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

Use Case:

The GoldSmith of an organisation wants to have a brief data on Gold Items,Silver Items,Customer Orders and Billings. So he can have a clear picture of his organisation and be able to make any decisions required based on this data. So he calls you on this task and wants you to represent the data in an appropriate way.

Create Report

1. Go to the app >> click on the reports tab.
2. Click New Report.

Jewelry Inventory S... Reports

Recent
12 items

REPORTS	Report Name	Folder	Created By	Created On	Subscribed
Recent	New Report billing w/ order	Private Reports	meghana katoju	7/19/2023, 4:34 AM	
Created by Me	New Items with Billin...	Private Reports	meghana katoju	7/19/2023, 4:30 AM	
Private Reports	New Prices Report	Private Reports	meghana katoju	7/19/2023, 4:27 AM	
Public Reports	Days on Market	DreamHouse Reports	meghana katoju	5/31/2022, 11:25 PM	
All Reports	New Billings with It...	Private Reports	meghana katoju	7/12/2023, 8:45 PM	✓
FOLDERS	New Billings with It...	Private Reports	meghana katoju	7/10/2023, 8:48 PM	
All Folders	New Opportunities v...	Private Reports	meghana katoju	7/12/2023, 12:03 AM	
Created by Me	New Accounts Repo...	Private Reports	meghana katoju	7/12/2023, 12:01 AM	
Shared with Me	New orders Report	Private Reports	meghana katoju	7/11/2023, 11:49 PM	
FAVORITES	New Billings with Price Report	Private Reports	meghana katoju	7/11/2023, 11:39 PM	
All Favorites	Copy of New Report	Private Reports	meghana katoju	6/20/2023, 11:19 PM	
	New Employees Report	Private Reports	meghana katoju	6/20/2023, 11:08 PM	

3. Select report type from category or from report type panel or from search panel ? click on start report

Jewelry Inventory S... Prices Report Builder

Create Report

Category	Select a Report Type
Recently Used	Q PRICE
All	Report Type Name Category
Accounts & Contacts	Price Books with Products Standard
Opportunities	Items with Prices Standard
Customer Support Reports	Prices Standard

4. Customise your report
5. Add fields from the left pane as shown below.

The screenshot shows the Report Builder interface. On the left, the 'Fields' pane is open, displaying 'Outline' and 'Filters'. Under 'Groups', there is a section for 'GROUP ROWS' with an 'Add group...' button. Under 'Columns', there is a section with 'Add column...' highlighted by a red box. To the right, a preview area shows a list of items with columns for 'Price: Price' and '# Gold price'.

	Price: Price	# Gold price
1	p-022	
2	p-021	
3	p-027	
4	p-029	
5	p-030	
6	p-026	
7	p-025	
8	p-028	
9	p-024	
10	p-023	

5. Save or run it.

The screenshot shows the Report Builder interface after adding columns. The preview area now displays the full data with three columns: 'Price: Price', 'Gold price', and 'Silver price'.

	Price: Price	Gold price	Silver price
1	p-022	₹60,000,00000	₹7,100,00000
2	p-021	₹63,000,00000	₹72,000,00000
3	p-027	₹62,350,00000	₹70,200,00000
4	p-029	₹58,700,00000	₹69,000,00000
5	p-030	₹66,000,00000	₹78,000,00000
6	p-026	₹62,000,00000	₹70,000,00000
7	p-025	₹58,000,00000	₹69,000,00000
8	p-028	₹59,900,00000	₹73,000,00000
9	p-024	₹62,000,00000	₹73,000,00000
10	p-023	₹58,000,00000	₹69,000,00000
11		₹609,950,00000	₹714,200,00000

Note: Reports may get varied from the above pictures as the data might be different.

Creating Report

1. Create a report with report type: “Item with Billings”.
2. Create a report with report type: “Billings with item and Customer order”

Task14: Creating Dashboards

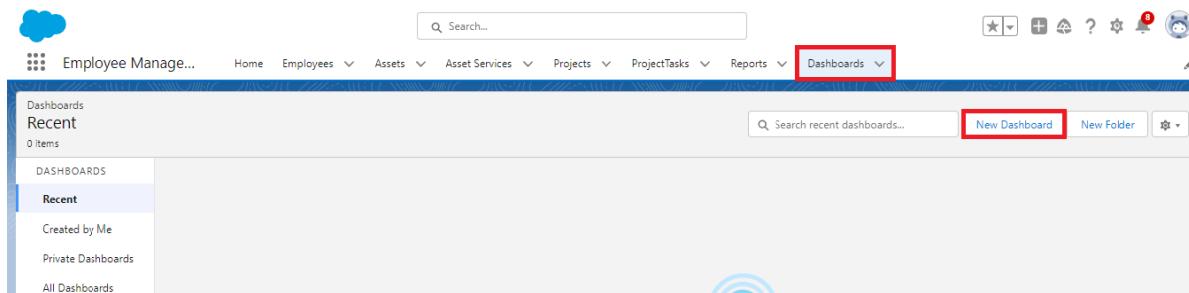
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing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

Use Case:

As an Admin for the organisation you keep pushing yourself to reach out the business requirements to take the organisation to peak heights and all your superiors are very much impressed with your efforts and work dedication. In addition with reports you make an ease for the GoldSmith in viewing the reports with data visualisation. So he doesn't have to search for the data he wants to check.

Creating Dashboards

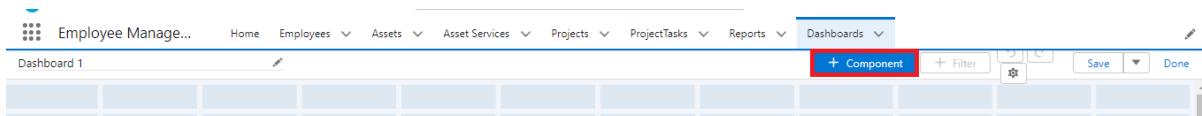
Go to the app>>click on the Dashboards tabs.



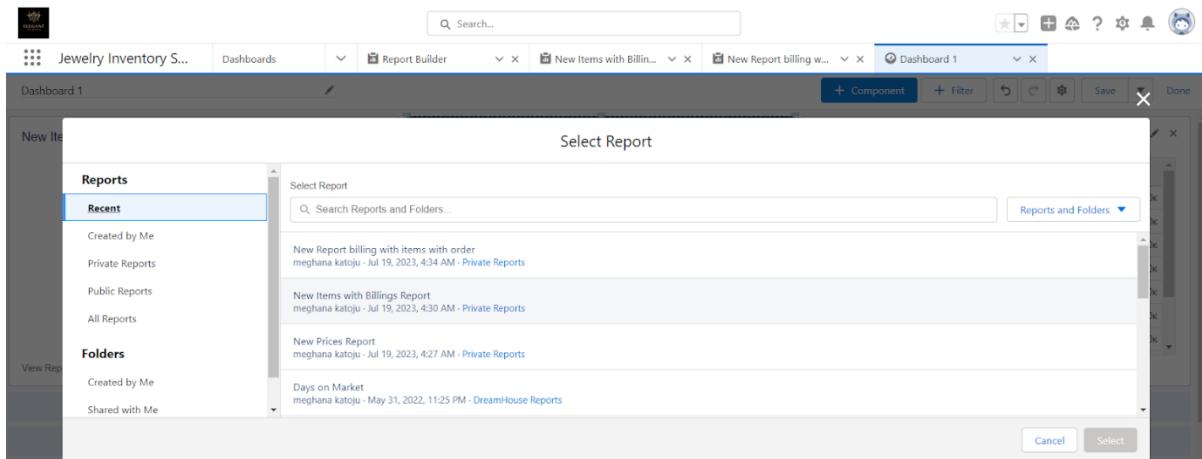
1. Give a Name and click on Create.

A screenshot of a 'New Dashboard' creation form. The title 'New Dashboard' is at the top. There are three input fields: 'Name' (containing 'Dashboard 1'), 'Description' (an empty text area), and 'Folder' (containing 'Private Dashboards'). A 'Select Folder' button is next to the folder dropdown. At the bottom right are 'Cancel' and 'Create' buttons, with 'Create' highlighted with a red box.

2. Select add component.

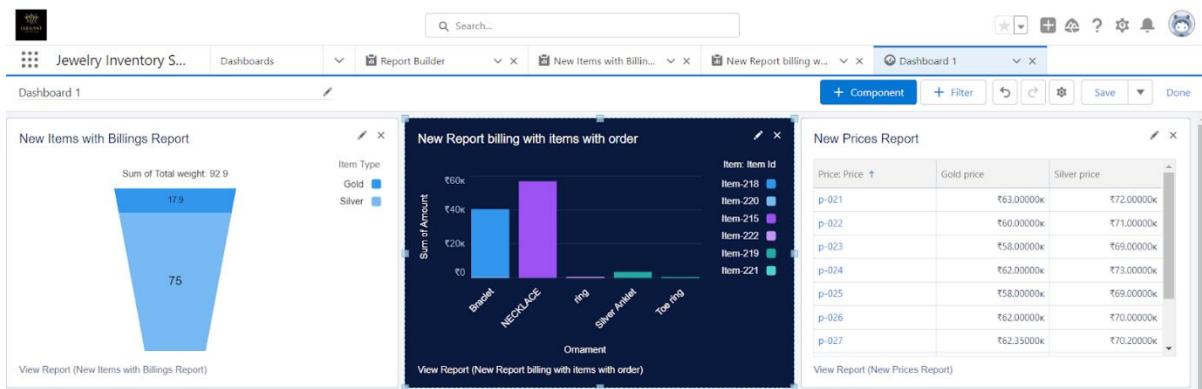


3. Select a Report and click on select.



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

Note: Create another Dashboard as we discussed in activity 1.



Task15: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.

Use Case:

Flows, also known as Salesforce Flows or Visual Flows, are powerful declarative automation tools in Salesforce that allow users to create and manage complex business processes without the need for code. Flows are designed using a drag-and-drop interface, making them easy to use for both

administrators and developers. They can be used for various automation tasks like email triggers including data entry, record updates, and guided user interactions.

Create a Flow

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

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

3. Select the Object as a “Billing” in the Drop down list.

4. Select the Trigger Flow when: “A record is Created or Updated”.

5. Select the Optimize the flow for: “Actions and Related Records” and Click on Done.

6. Now change the mode from Auto-layout to free-form.

7.Now select the manger option in the toolbox, click New resource.

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object
Item

Configure Trigger

* Trigger the Flow When:

A record is created
 A record is updated
 A record is created or updated
 A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

Cancel Done

6. Select the resource type as text template.

The screenshot shows the Salesforce Flow Builder Manager interface. At the top, there's a toolbar with icons for back, forward, search, and save. The title bar says "Flow Builder" and "Email - V5". On the left, a sidebar titled "Manager" lists "Text Templates (1)" containing "Emailbody", and "Actions (1)" containing "Email". The main area is titled "Configure Start" and contains three sections: "Select Object" (with "Billing" selected), "Configure Trigger" (with "A record is created or updated" selected), and "Set Entry Conditions" (with a note about minimizing unnecessary flow executions). At the bottom right of this section are "Cancel" and "Done" buttons, with "Done" highlighted by a red box. Below this is a "New Resource" dialog box titled "New Resource". It has a field labeled "*Resource Type" with a dropdown menu open. The menu items are: "Variable" (description: "Store a value that can be used and changed throughout the flow."), "Constant" (description: "Store a value that can be used but not changed throughout the flow."), "Formula" (description: "Calculate a value when the formula is used in the flow."), "Text Template" (description: "Store text that can be used and changed throughout the flow.", this item is also highlighted by a red box), and "Stage" (description: "Identify different phases in the flow to track user progress."). The "Done" button from the previous screen is also visible at the bottom right of the "New Resource" dialog.

9. Enter the API name as “ Email body”.

Edit Text Template

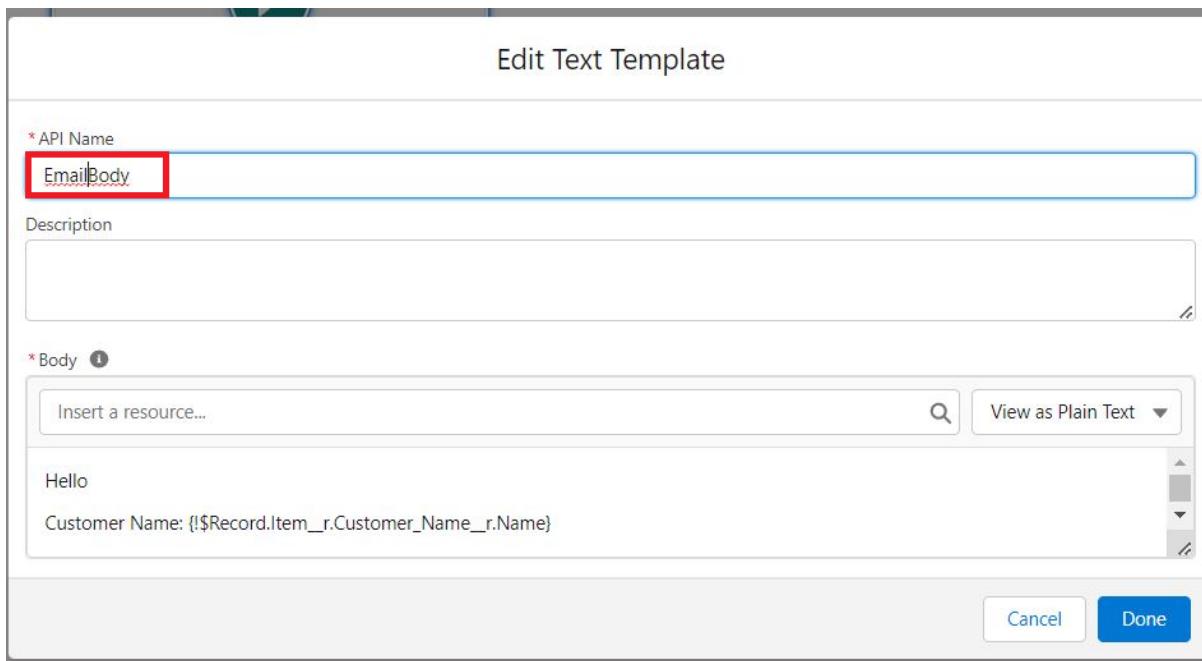
* API Name
EmailBody

Description

* Body

Insert a resource...

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



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.

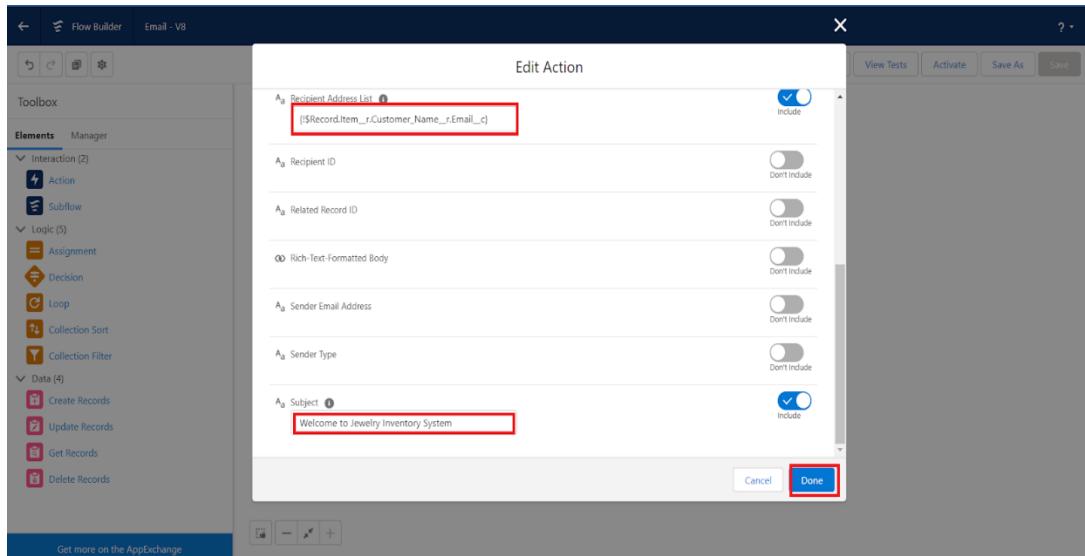
The screenshot shows the 'New Action' configuration interface. On the left, there's a sidebar with a 'Filter By' dropdown set to 'Category' and a list of categories including 'Order Management', 'Waitlists', 'Notifications', and 'Email'. The 'Email' category is selected and highlighted in blue. On the right, the main panel shows the 'Action' set to 'Send Email'. A note above the input fields says: 'Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.' Below this, there are two input fields: '*Label' containing 'notice' and '*API Name' also containing 'notice', both of which are highlighted with red boxes. A 'Description' field is present but empty. The next section, 'Set Input Values for the Selected Action', contains several input fields and toggle switches. The first row has 'Body' with value '{!Email_Body}' (highlighted with a red box), a checked toggle switch (highlighted with a red box), and a 'Don't Include' toggle switch. The second row has 'Email Template ID' and a 'Don't Include' toggle switch. The third row has 'Log Email on Send' and a 'Don't Include' toggle switch. The fourth row has 'Recipient Address Collection' and a 'Don't Include' toggle switch. At the bottom right are 'Cancel' and 'Done' buttons, with 'Done' being highlighted with a red box.

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 ”.

20. 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.

22. And click save, and click on activate.

The screenshot shows the Salesforce Flow Builder interface. At the top, a modal window titled "Save the flow" is displayed. It contains fields for "Flow Label" (with a red box around it) and "Flow API Name". Below these is a "Description" text area. At the bottom right of the modal are "Cancel" and "Save" buttons, with "Save" being highlighted by a red box. In the background, the main flow editor window is visible. It shows a "Record-Triggered Flow" for the "Billing" object, triggered by "A record is created or updated". The flow starts with a "Start" step, followed by a "Run Immediately" step, which then triggers an "Action" step of type "Email". The toolbar at the top of the editor has buttons for "Run", "Debug", "View Tests", "Activate" (highlighted by a red box), "Save As" (highlighted by a red box), and "Save". Red arrows point from the "Activate" and "Save As" buttons in the toolbar up towards the "Save" button in the modal. Another red arrow points from the "Save" button in the modal down towards the "Action" step in the flow diagram.

THANK YOU