

TITLE: CRM Application for Jewel Management

Project Overview:

The Jewel Inventory System is a comprehensive software Solution designed to streamline and manage the inventory and sales processes of a jewellery store or a jewellery manufacturer. The system aims to provide an efficient and user-friendly solution to track and control the inventory of various jewellery items, maintain accurate records, and facilitate seamless sales transactions.

Objectives:

1. Enhance Customer Relationship Management

Build stronger, long-term relationships with customers by maintaining detailed customer profiles and interactions.

2. Streamline Sales and Order Management

Optimize the sales process from inquiry to order fulfilment for increased efficiency and accuracy.

3. Improve Inventory and Product Management

Ensure efficient handling of jewellery inventory and product details.

4. Enable Targeted Marketing and Campaign Management

Increase customer engagement and sales through data-driven marketing.

5. Boost Operational Efficiency

Reduce manual tasks and errors through automation and integration.

6. Provide Business Insights and Analytics

Use data to support strategic decisions and identify business trends.

7. Support Omnichannel Customer Experience

Provide a seamless experience to customers across all touchpoints.

8. Ensure Data Security and Compliance

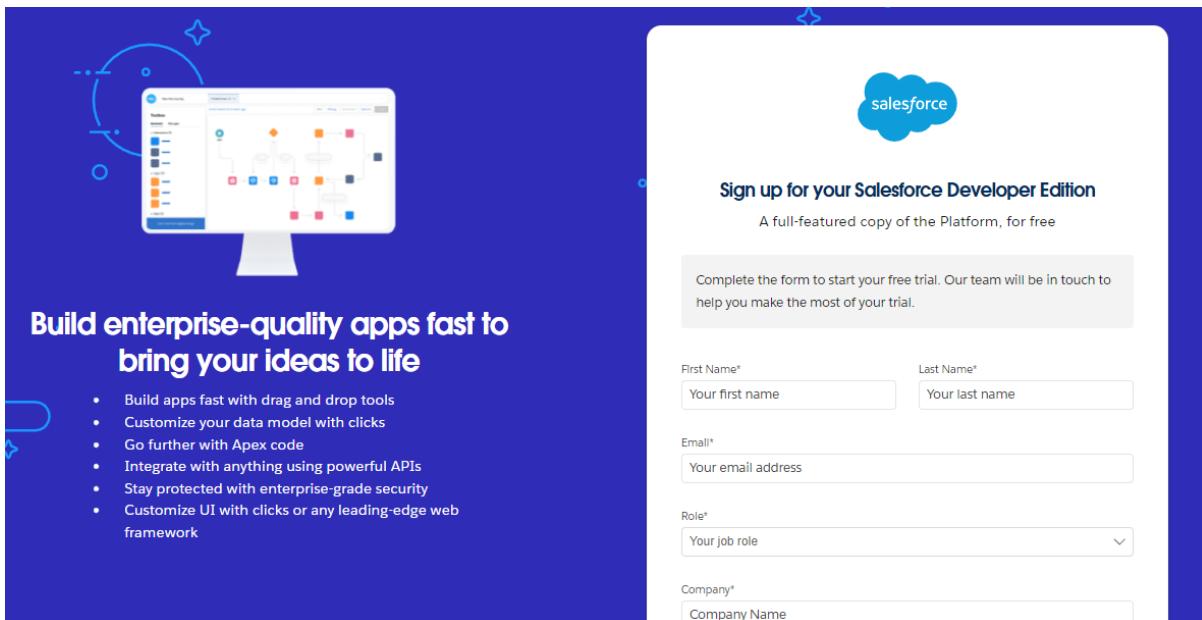
Protect sensitive customer and business data and ensure regulatory compliance.

Module: Salesforce

Activity 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
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.

Activity 2: Account Activation

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

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

asdfghjkl

Change Password

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

SETUP Home

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

Learn More

Get Started

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Module: Object

Activity 3: Create Jewel Customer Object

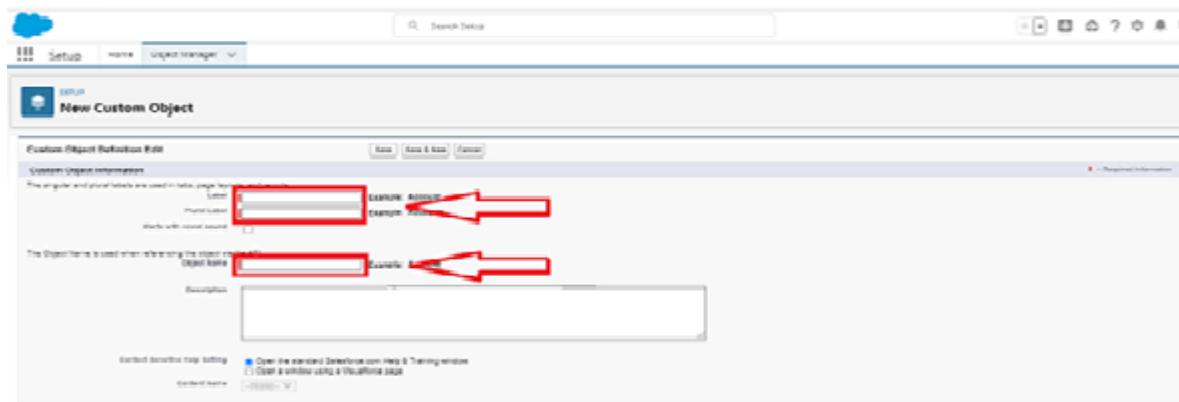
The purpose of creating a Jewel Customer custom object is to store and manage information about Customer.

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.



1. Enter the label name: Jewel Customer
2. Plural label name: Jewel Customers



3. Enter Record Name Label and Format

- Record Name >> Customer name
- Data Type >> Text

A screenshot of the 'Enter Record Name Label and Format' configuration page. It includes the following sections:

- Enter Record Name Label and Format**: A note explaining that the Record Name appears in various places like layouts and search results. A 'Record Name' field contains 'Customer' and a 'Data Type' dropdown shows 'Text'.
- Optional Features**: A section with checkboxes for 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'.
- Object Classification**: A section with checkboxes for 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'.
- Deployment Status**: A section with a radio button for 'In Development' and another for 'Deployed'.

2. Click on Allow reports.

3. Allow search and click Save.

Activity 4: Create Item Object

The purpose of creating an 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).

Module: Tabs

Activity 5: 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 allow you to add Lightning Pages to Lightning Experience and the mobile app.

The screenshot shows the Salesforce Setup interface with two main sections: 'Custom Object Tabs' and 'Web Tabs'. Both sections have a 'New' button and a 'What Is This?' link. Under 'Custom Object Tabs', it says 'No Custom Object Tabs have been defined'. Under 'Web Tabs', it says '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.

The screenshot shows the 'New Custom Object Tab' setup page. It's Step 1 of 3. The 'Object' dropdown is set to 'None' and the 'Tab Style' dropdown is set to 'None'. The 'Tab Style' dropdown has 'Jewel Customer' listed. There is an optional field for a 'Splash Page Custom Link' which is currently 'None'. A description field is present but empty. At the bottom are 'Next' and 'Cancel' buttons.

Activity 6: 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.

Module: The Lightning App

Activity 7: Create a Lightning App

To create a lightning app page:

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

The screenshot shows the Salesforce App Manager interface. The top navigation bar has tabs for 'Setup', 'Home', and 'Object Manager'. A red box highlights the 'App Manager' tab in the top left. Another red box highlights the 'Cloud (Appx Beta)' section in the center. A large red arrow points to the 'New Lightning App' button in the top right corner. The main area displays a table of existing apps, with columns for 'App Name', 'Developer Name', 'Description', 'Last Modified', 'App Type', and 'V...'. The table lists 13 items, including 'All Tabs', 'Analytics Studio', 'App Launcher', and various Salesforce applications like 'Chatter Desktop' and 'Content'.

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

App Name: Jewellery Inventory System.

Developer Name: This will auto generate

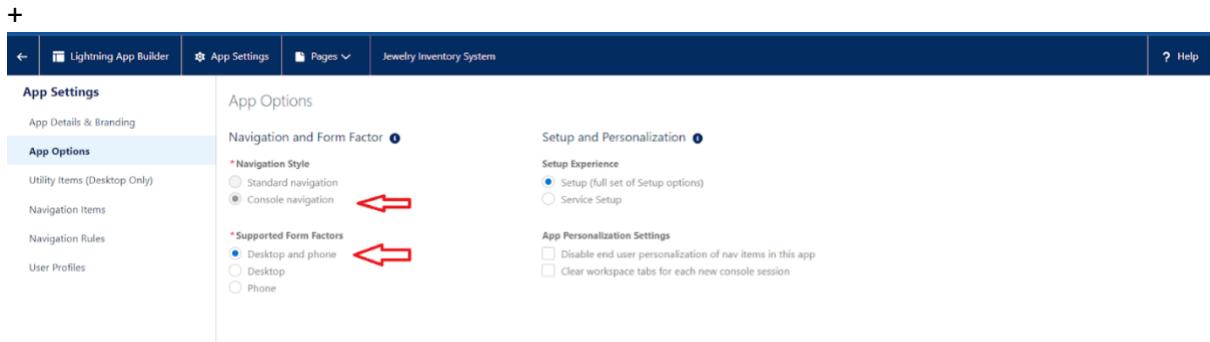
Description: Elevate your look with elegance

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

4. Primary colour hex value: keep this default.

The screenshot shows the 'New Lightning App' configuration dialog. The 'App Details' section contains fields for 'App Name' (Jewelry Inventory System), 'Developer Name' (Jewelry_Inventory_System), and 'Description' (Elevate your look with elegance). The 'App Branding' section includes a 'Primary Color Hex Value' field set to '#0070D2', an 'Image' upload button, and an 'Org Theme Options' checkbox. Below the dialog is a preview of the app launcher card, which features a blue square icon with 'JI', the app name 'Jewelry Inventory System', and the description 'Elevate your look with elegance'. At the bottom right of the dialog is a 'Next' button.

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



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

Module: Fields

Activity 8: 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.

Activity 9: 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.

Activity 10: 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 Object Manager interface. At the top, there's a search bar with the text 'jewel'. Below it, a table lists objects. The first row, 'Jewel Customer', has its 'LABEL' column highlighted with a red arrow. The table columns are labeled: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The 'Jewel Customer' row also has a red arrow pointing to its API name, 'Jewel_Customer__c'. The object is described as a 'Custom Object'.

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

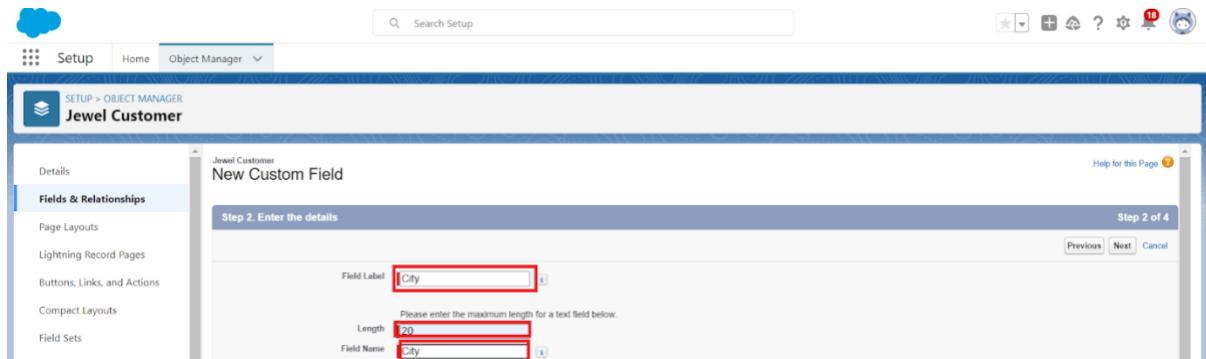
The screenshot shows the 'Fields & Relationships' page for the 'Jewel Customer' object. On the left, there's a sidebar with 'Details', 'Fields & Relationships' (which is highlighted with a red arrow), 'Page Layouts', 'Lightning Record Pages', and 'Buttons, Links, and Actions'. In the main area, there's a table with three rows: 'Country' (Type: Text(18)), 'Created By' (Type: Lookup(User)), and 'Customer Name' (Type: Text(80)). At the top right of the main area, there's a 'New' button with a red arrow pointing to it. The top navigation bar includes 'Search Setup' and various icons.

3. Select Data type as “Text”.

The screenshot shows a list of data types. The 'Text' option is selected and highlighted with a red border. The other options are: 'Picklist' (radio button not selected), 'Picklist (Multi-Select)' (radio button not selected), 'Text Area' (radio button not selected), and 'Text Area (Long)' (radio button not selected). Descriptions for each type are provided to the right of the radio buttons.

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

4. Click on Next

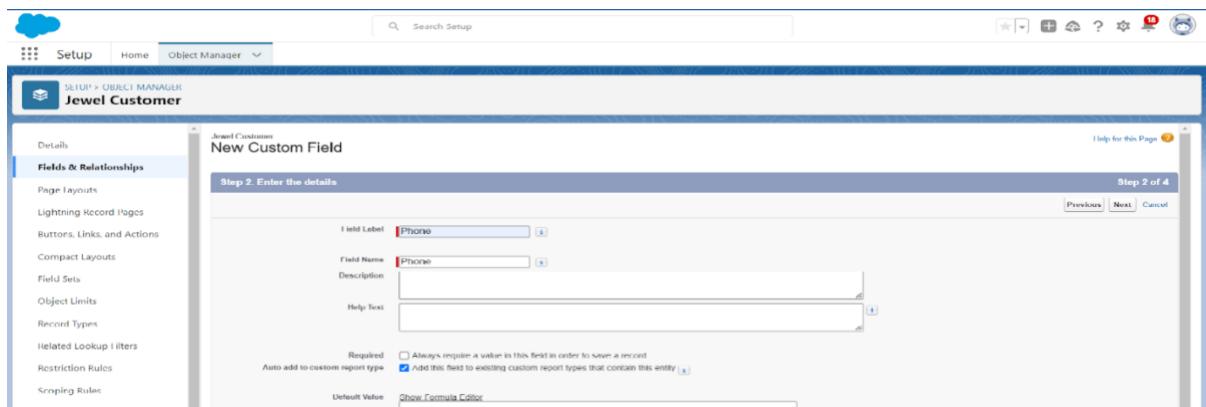


5. Fill the above as following:
 - Field Label: City
 - Length: 20
 - Field Name: gets auto generated
 - Click on Next >> Next >> Save and new.

Activity 11: 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”.



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

Activity 12: Creating the Email field in object Jewel Customer

To create fields in an object:

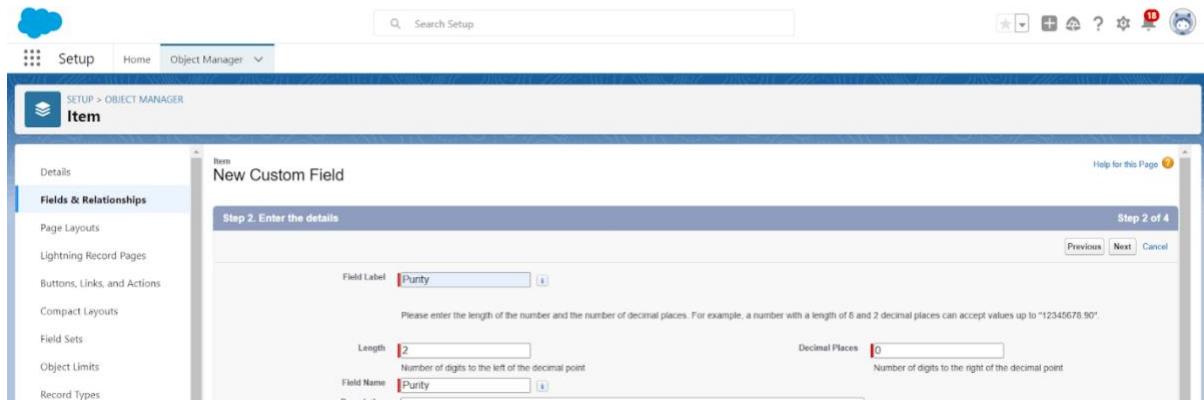
1. Go to setup >> click on Object Manager >> type object name (Jewel Customer) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New

3. Select Data type as “Email” and click Next.
4. Given the Field Label as “Email”.
5. Field Name will be auto populated, and click on Next >> Next >> Save.

Activity 13: 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.

Activity 14: 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.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A new custom field is being created for the 'Item' object. The field is named 'New Custom Field' and is of type 'Text'. The 'Values' section shows two entries: 'Gold' and 'Silver'. The 'Restrict picklist to the values defined in the value set' checkbox is checked. The 'Field Label' is 'Item Type'.

6. Click Next? Next? Next? Save.

Activity 15: 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 'Object Manager' selected. A new currency field is being created for the 'Price' object. The field is named 'Gold price' and has a length of 8 and 0 decimal places. The field name is auto-generated as 'Gold_price'.

4. Enter Field Label as “Gold Price” and length as “8”and decimal 0. Fields name will be auto generated.
5. Click Next >> Next >> Next >> Save.

Activity 16: 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.

The screenshot shows the Salesforce Setup interface. In the top navigation bar, there is a search bar labeled "Search Setup" and several icons. Below the bar, the "Setup" tab is selected, followed by "Home" and "Object Manager". On the left sidebar, under "Item" settings, "Fields & Relationships" is selected. A sub-menu for "Fields & Relationships" is open, listing options like 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, and Scoping Rules. The main content area is titled "Item New Custom Field" and is on "Step 2 of 6: Choose output type". It shows "Field Label" as "Gold price" and "Field Name" as "Gold_price". Under "Formula Return Type", "None Selected" is chosen, and a list of options is provided: Checkbox, Currency (selected), Date, Date/Time, and Number. Each option has a brief description and examples. At the bottom right of the step, there are "Previous", "Next", and "Cancel" buttons.

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

The screenshot shows the "Advanced Formula" tab for the "Gold Price" field. The formula editor contains the text "Prices__r.Gold_price__c / 10". To the right of the editor, there is a "Functions" panel titled "Operators & Functions" with a dropdown menu "All Function Categories". A scrollable list of functions includes ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, and others. At the bottom of the functions panel, there is a button "Insert Selected Function". The top right corner of the screen has a "Help for this Page" link.

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

Activity 17: 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; width: fit-content;"> 1-3 Days 4-5 Days 6-7 Days 8-10 Days </div>
		Priority	Picklist <div style="border: 1px solid black; padding: 5px; width: fit-content;"> Low Medium High Critical </div>
		Silver Price	Formula (Return Type: Number) (Decimal=3) <div style="border: 1px solid black; padding: 5px; width: fit-content;"> (Prices__r.Silver_price__c / 1000) </div>

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

		<pre>IF(ISPICKVAL(Item_Type__c ,"Gold"), Weight__c * 300 , Weight__c * 10)</pre>
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4	Customer Order					
	<table border="1"> <tr> <td>Order Status</td> <td>Picklist</td> </tr> <tr> <td></td> <td> <ul style="list-style-type: none"> Started Not Started On Hold Completed Not Completed </td> </tr> </table>	Order Status	Picklist		<ul style="list-style-type: none"> Started Not Started On Hold Completed Not Completed 	
Order Status	Picklist					
	<ul style="list-style-type: none"> Started Not Started On Hold Completed Not Completed 					

5	Now create the remaining fields using the data types mentioned.											
	s.no	Object name										
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Street	Text (20)											
Country	Text (18)											
Zip/Postal code	Text (6)											

2	Price	<table border="1"> <tr> <td>Silver Price</td><td>Currency (Length=8,Decimal=5)</td></tr> </table>	Silver Price	Currency (Length=8,Decimal=5)															
Silver Price	Currency (Length=8,Decimal=5)																		
3	Item	<table border="1"> <tr> <td>Field Label: Customer Name</td><td>Lookup Relationship with Jewel Customer Object</td></tr> <tr> <td>Ornament</td><td>Text (20)</td></tr> <tr> <td>Weight</td><td>Number (Length=8,Decimal=5)</td></tr> <tr> <td>Stone Weight</td><td>Number (Length=5,Decimal=5)</td></tr> <tr> <td>Percentage</td><td>Number (Length=2,Decimal=0)</td></tr> <tr> <td>Stone/Other Price</td><td>Currency (Length=8,Decimal=2)</td></tr> <tr> <td>Expected Days Of Return</td><td> 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> </td></tr> <tr> <td></td><td>Priority</td><td>Picklist</td></tr> </table>	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
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	Priority	Picklist																	

					<img alt="A vertical stack	

			<pre>IF (ISPICKVAL (Item_Type__c,"Gold"), Total_weight__c* Purity_Gold_price__c , Total_weight__c * Silver_price__c)</pre>
KDM	Formula (Return Type: Currency) (Decimal=0)		<pre>(Amount__c * Percentage__c) / 100</pre>
Making Charges	Formula (Return Type: Currency) (Decimal=0)		<pre>IF(ISPICKVAL(Item_Type__c ,"Gold"), Weight__c * 300 , Weight__c * 10)</pre>

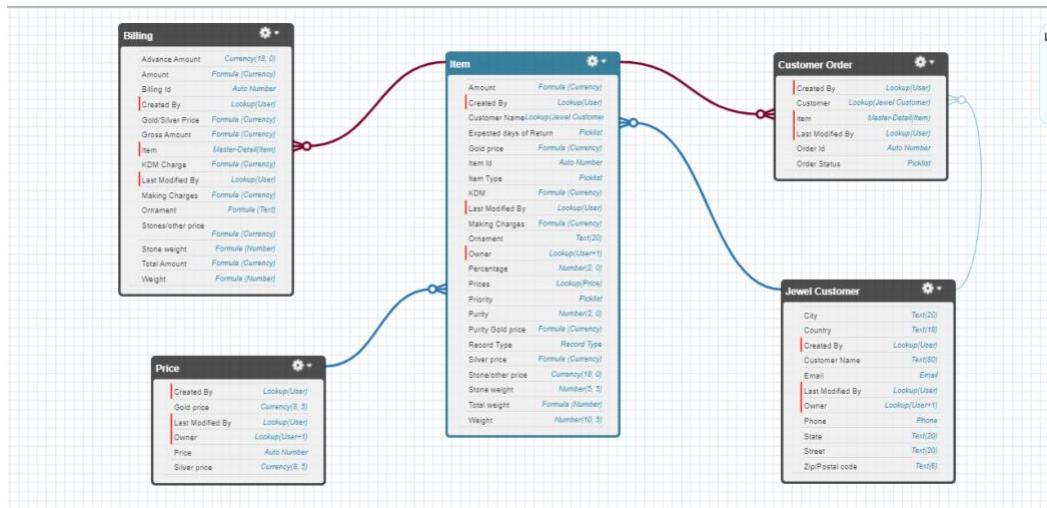
4	Customer Order	
	Order Status	<p>Picklist</p> <ul style="list-style-type: none"> Started Not Started On Hold Completed Not Completed

5	Billin g													
		<table border="1"> <tr> <td>Field Label: Item</td><td>Lookup Relationship with Item Object</td></tr> <tr> <td>Orname nt</td><td> <p>Formula (Return Type: Text)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item__r.Ornament__c</div> </td></tr> <tr> <td>Stone weight</td><td> <p>Formula (Return Type: Number) (Decimal=2)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item__r.Stone_weight__c</div> </td></tr> <tr> <td>Weigh t</td><td> <p>Formula Return Type: Number (Decimal=2)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item__r.Total_weight__c</div> </td></tr> <tr> <td>Amount</td><td> <p>Formula (Return Type: Currency) (Decimal=2)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item__r.Amount__c</div> </td></tr> <tr> <td>Gold/Silver Price</td><td> <p>Formula (Return Type: Currency) (Decimal=2)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">IF(ISPICKVAL(Item__r.Item_Type__c , "Gold"), Item__r.Gold_price__c , Item__r.Silve r_price__c)</div> </td></tr> </table>	Field Label: Item	Lookup Relationship with Item Object	Orname nt	<p>Formula (Return Type: Text)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item__r.Ornament__c</div>	Stone weight	<p>Formula (Return Type: Number) (Decimal=2)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item__r.Stone_weight__c</div>	Weigh t	<p>Formula Return Type: Number (Decimal=2)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item__r.Total_weight__c</div>	Amount	<p>Formula (Return Type: Currency) (Decimal=2)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item__r.Amount__c</div>	Gold/Silver Price	<p>Formula (Return Type: Currency) (Decimal=2)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">IF(ISPICKVAL(Item__r.Item_Type__c , "Gold"), Item__r.Gold_price__c , Item__r.Silve r_price__c)</div>
Field Label: Item	Lookup Relationship with Item Object													
Orname nt	<p>Formula (Return Type: Text)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item__r.Ornament__c</div>													
Stone weight	<p>Formula (Return Type: Number) (Decimal=2)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item__r.Stone_weight__c</div>													
Weigh t	<p>Formula Return Type: Number (Decimal=2)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item__r.Total_weight__c</div>													
Amount	<p>Formula (Return Type: Currency) (Decimal=2)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item__r.Amount__c</div>													
Gold/Silver Price	<p>Formula (Return Type: Currency) (Decimal=2)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">IF(ISPICKVAL(Item__r.Item_Type__c , "Gold"), Item__r.Gold_price__c , Item__r.Silve r_price__c)</div>													

		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

Activity 18: 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.

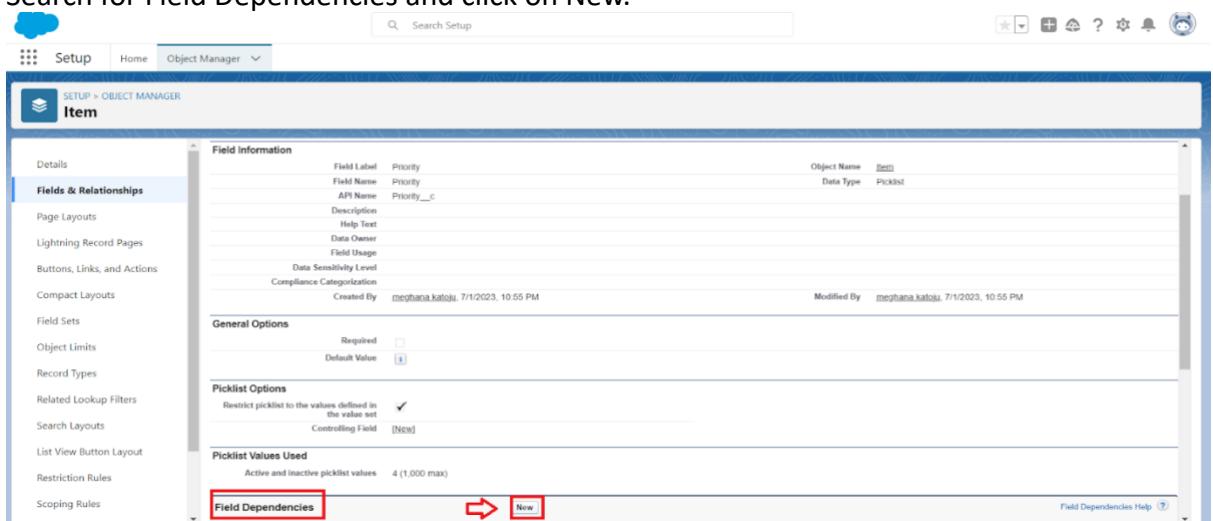


Activity 19: Creating the Field Dependencies

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.

New Field Dependency

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.

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

Controlling Field	Priority
Dependent Field	Expected days of Return

Instructions

Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
Use the Preview button to test the results.

Legend

- Excluded Value
- Included Value

Click button to include or exclude selected values from the dependent picklist.			
<input type="button" value="Include Values"/> <input type="button" value="Exclude Values"/>			
Priority:	Low	Medium	High
Expected days of Return:	1-3 Days 4-5 Days 6-7 Days 8-10 Days	1-3 Days 4-5 Days 6-7 Days 8-10 Days	1-3 Days 4-5 Days 6-7 Days 8-10 Days
	Showing Columns: 1 - 4 (of 4) < Previous Next > View All Go to		
	Showing Columns: 1 - 4 (of 4) < Previous Next > View All		

Activity 20: 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.

SETUP > OBJECT MANAGER
Jewel Customer

Validation Rules

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
No items to display.				

Validation Rules 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))
```

)

)

SETUP > OBJECT MANAGER
Jewel Customer

Validation Rule Edit

Rule Name: Postal Code	Save Save & New Cancel
Active: <input checked="" type="checkbox"/>	
Description:	
Error Condition Formula	
Example: Discount_Percent_c>0.30 More Examples... Display an error if Discount is more than 30% If this formula expression is true, display the text defined in the Error Message area	
<input type="button" value="Insert Field"/> <input type="button" value="Insert Operator"/> <pre>AND(OR(LEN(Zip_Postal_code__c) <> 6, NOT(REGEX(Zip_Postal_code__c, "^[0-9]{6}\$"))), NOT(ISBLANK(Zip_Postal_code__c)))</pre>	
<input type="button" value="Check Syntax"/> No errors found	
Functions	
-- All Function Categories - <input type="button" value="Insert Selected Function"/>	
ABS ACOS ADDMONTHS AND ASCII ASIN	
<input type="button" value="Insert Selected Function"/> ABS(number) Returns the absolute value of a number, a number without its sign	
Help on this function	
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: <input type="radio"/> Top of Page <input checked="" type="radio"/> Field Zip/Postal code	

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 : -

$$\text{OR(ISBLANK(City_c), ISBLANK(Country_c),ISBLANK(Phone_c),ISBLANK(State_c),ISBLANK(Street_c))}$$
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 : -

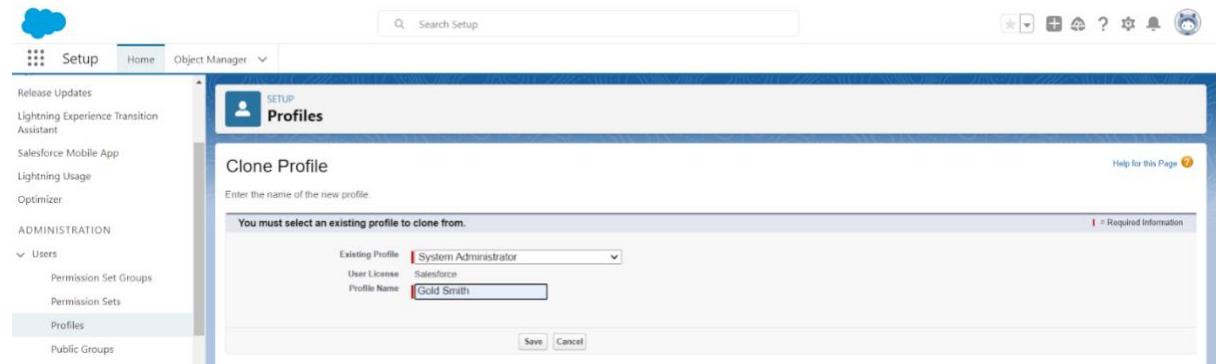
$$\text{OR(ISBLANK(Amount_c), ISBLANK(Customer_Name_c),ISBLANK(Gold_price_c),ISBLANK(KDM_c),ISBLANK(Ornament_c),ISBLANK(Percentage_c),ISBLANK(Making_Charges_c),ISBLANK(Prices_c),ISBLANK(Stone_weight_c),ISBLANK(Silver_price_c),ISBLANK(Stone_other_price_c),ISBLANK(Stone_weight_c),ISBLANK(Weight_c))}$$
3. Enter the Error Message as “Please fill Required fields”, select the Error location as Top of Page and click Save.

Module: Profiles

Activity 21: 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.

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"/>					
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.

Activity 22: 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 () >> 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.

Module: Roles

Activity 23: 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 interface with the 'Roles' page selected. The sidebar has a 'Roles' link highlighted with a red box. The main content area displays a 'Territory-based Sample' role hierarchy:

- Executive Staff** (CEO, President, CFO, VP, Sales)
 - Western Sales Director** (Director, M. Sales)
 - CA Sales Rep**, **OR Sales Rep**
 - Eastern Sales Director** (Director, E. Sales)
 - NY Sales Rep**, **MA Sales Rep**
 - International Sales Director** (Director, Int'l Sales)
 - Asian Sales Rep**, **European Sales Rep**

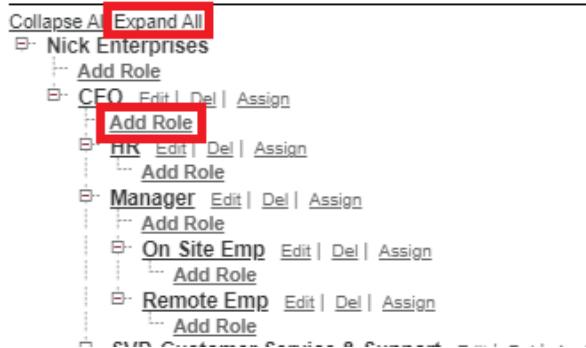
Each role level is described with its permissions:

- Executive Staff**: View & edit data, roll up forecasts, & generate reports for all users below or at same level of other Executive Staff.
- Western Sales Director**: View & edit data, roll up forecasts, & generate reports for all users below or at same level of other Western Sales Directors.
- Eastern Sales Director**: View & edit data, roll up forecasts, & generate reports for all users below or at same level of other Eastern Sales Directors.
- International Sales Director**: View & edit data, roll up forecasts, & generate reports only for own data and for all users below or at same level of other International Sales Directors.

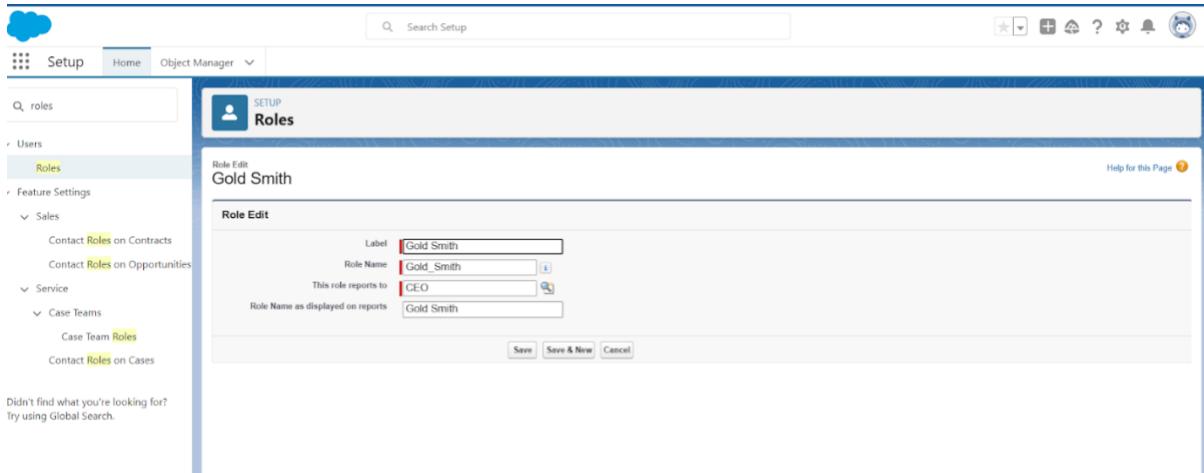
At the bottom right of the page, there is a 'Set Up Roles' button and a 'Don't show this page again' checkbox.

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

Your Organization's Role Hierarchy



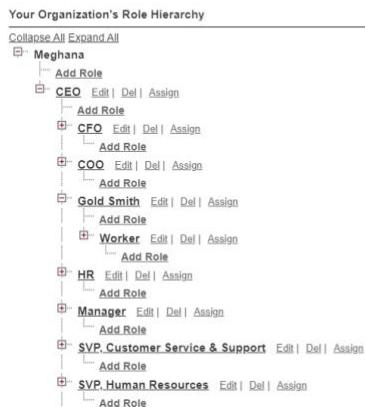
3. Give Label as “Gold Smith” and Role name gets auto populated. Check to whom this role (Gold Smith) reports. Then click on Save.



Activity 24: Create one more role as Worker which reports to Gold Smith

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.



Module: Users

Activity 25: 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 new user record is being created for 'Niklaus Mikaelson'. The 'Role' field is explicitly highlighted with a red box. Other fields like 'User License' and 'Profile' also show 'Gold Smith' selected. The 'General Information' tab is active, displaying various user details such as First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division.

1. Save.

Activity 26: 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 an 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.

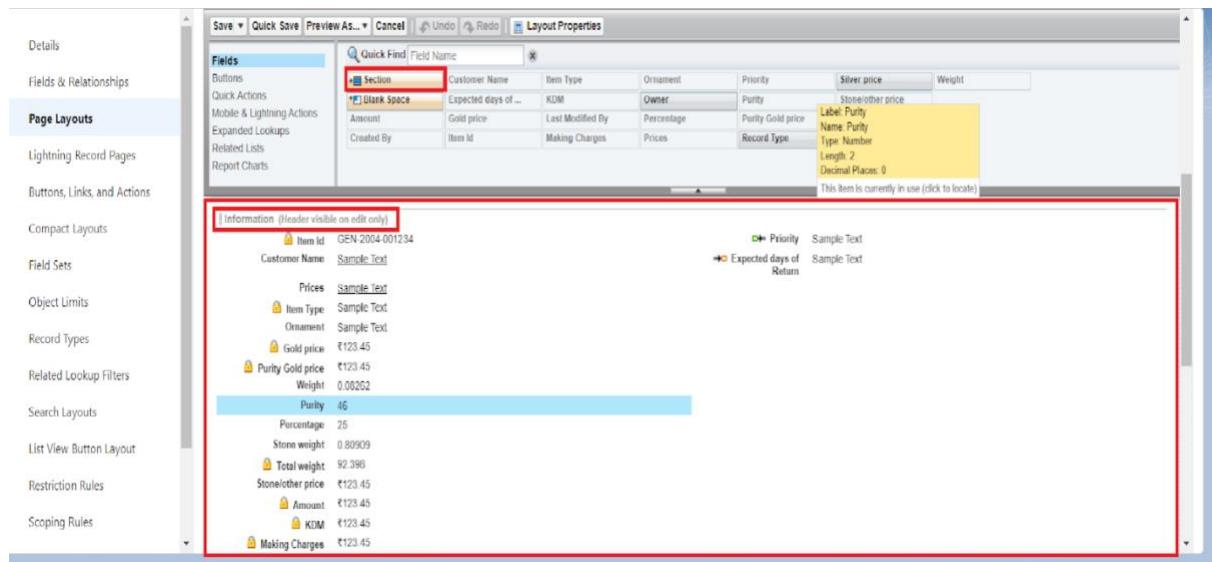
Module: Page layouts

Activity 27: To Create a Gold Page layout

1. Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.
2. Click on Page layout >> Click on New.

3. Give Page layout Name as "Page Layout for Gold" and click on Save and New.

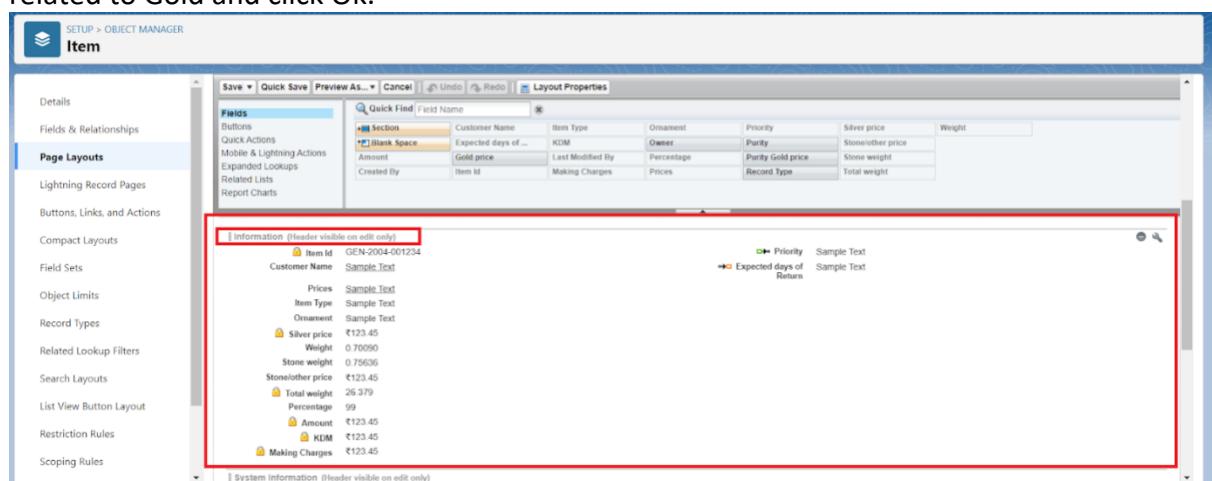
4. Arrange the field as shown in the Information Section, remove fields which are related to Silver and click Ok.



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

Activity 28: 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.



Module: Record Types

Activity 29: 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.

The screenshot shows the Salesforce Object Manager for the 'Item' object. The left sidebar has links for Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The 'Record Types' link is highlighted with a red box and a red arrow pointing to it. The main area displays a table titled 'Record Types' with two items: 'Gold' and 'Silver'. The 'Gold' record has a description of 'Gold items information' and was modified by 'meghana katoju, 7/18/2023, 11:45 AM'. The 'Silver' record has a description of 'Silver items information' and was modified by 'meghana katoju, 7/18/2023, 11:45 AM'.

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

The screenshot shows the 'Edit Record Type' page for 'Gold'. The left sidebar shows the 'Record Types' link is selected. The main form has fields for Record Type Label (set to 'Gold'), Record Type Name (set to 'Gold'), Namespace Prefix (empty), Description ('Gold items information'), and Active (checkbox checked). A red box highlights the entire edit form.

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 JW & System Administrator profile and click on Next.

Record Type	Access Level
Gold smith	<input checked="" type="checkbox"/> Gold (Default) .Silver
J Worker1	<input checked="" type="checkbox"/> Gold (Default) .Silver
J Worker2	<input checked="" type="checkbox"/> Gold (Default) .Silver
J WORKER3	<input checked="" type="checkbox"/> Gold (Default) .Silver

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.

User Profile	Page Layout
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

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
Support User	Item Layout
Support User.	Item Layout
System Administrator	Item Layout
Work.com Only User	Item Layout
Worker	Page layout for Gold

Activity 2: Create another Record Type with name “Silver” following the steps from Activity1.

Note: Use page layout for Silver.

Module: Permission sets

Activity 30: 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.

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

- Setup Tab:** The "Setup" tab is highlighted with a red box.
- Object Manager:** The "Object Manager" dropdown is open, showing "Permission Sets" which is also highlighted with a red box.
- Search Bar:** A search bar at the top contains the text "Permission Sets".
- Permission Sets Page:**
 - Header:** Shows "Permission Sets" and a "New" button with a red box around it.
 - Submenu:** Under "Users", "Permission Sets" is highlighted with a red box.
 - Text:** "Didn't find what you're looking for? Try using Global Search."
 - Table:** Displays a list of permission sets with columns: Action, Permission Set Label, Description, and License.
 - Table Data:**

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
 - Page Navigation:** Includes links for "A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other" and a "Help for this Page" link.

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

Permission Set
Clone: Per to Worker

Enter permission set information

Label	Per to Worker
API Name	Per_to_Worker
Description	
Session Activation Required	<input type="checkbox"/>
License	

Save Cancel

3. Under Apps Select object settings.

Apps

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

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform [Learn More](#)

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 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.

The screenshot shows the 'Current Assignments' section with a blue header bar containing the 'Add Assignment' button, which is highlighted with a red box. Below the header is a blue decorative graphic. The main area is titled 'Per to Worker' and shows a list of users under 'Select Users to Assign'. The list includes columns for Full Name, Alias, Username, Role, Active, and Profile. Two specific users, 'Mani deepak' and 'Meghana Katoj Site Guest User', have their 'Role' and 'Profile' fields highlighted with red boxes. At the bottom right of the list area are 'Cancel' and 'Next' buttons.

8. Now select the users which you have created in user milestone, using worker profile and click on Next? Assign? Done.

The screenshot shows the 'Select an Expiration Option For Assigned Users' screen. It features a radio button for 'No expiration date' (selected) and another for 'Specify the expiration date' with options like 1 Day, 1 Week, 30 Days, 60 Days, and Custom Date. A 'Time Zone' dropdown is also present. Below this is a table titled 'Selected Users' with columns for Full Name, Role, Profile, Active, User License, and Expires On. A single user row, 'Mani deepak', is selected and highlighted with a red box. At the bottom are 'Cancel' and 'Assign' buttons.

Module: Trigger

Activity 31: Create a Trigger Handler class

Trigger handler:

A trigger handler is a design pattern that organises trigger logic into separate classes. This helps in keeping code organised, reusable, and easier to maintain. The trigger handler class contains methods that handle the specific logic for different trigger events, improving code structure and readability. This approach is particularly useful for complex triggers or projects with multiple triggers, as it promotes modular coding practices and reduces the chances of code duplication.

CODE:

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

Activity 32: Create the trigger

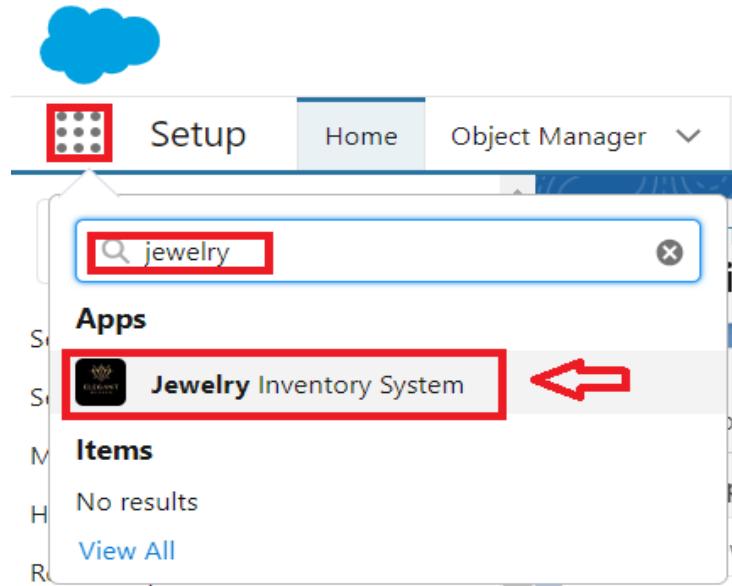
CODE:

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

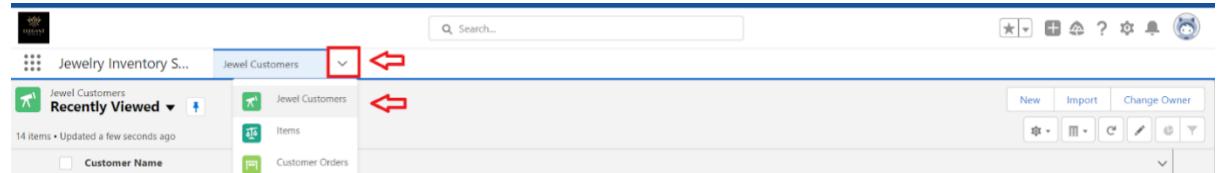
Module: User Adoption

Activity 33: Create a Record (Jewel Customer)

1. Click on App Launcher on the left side of the screen.
2. Search Jewellery Inventory System & click on it.



3. Click on Drop Down and Click on the Jewel Customer tab.
4. Click new.



5. Fill the Details and click on Save.

Activity 34: View a Record (Jewel Customer)

1. Click on App Launcher on the left side of the screen.
2. Search Jewellery 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.

Activity 35: Delete a Record (Jewel Customer)

1. Click on App Launcher on the left side of the screen.
2. Search Jewellery 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.

Module: Reports

Activity 36: Create Report

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

The screenshot shows the 'Reports' section of the Jewelry Inventory System. The 'Reports' tab is active. In the top right, there's a search bar with 'Search...' and a red box around the 'New Report' button. Below it is another search bar with 'Search recent reports...' and a red box around its 'New Report' button. The main area is a grid of reports with columns for 'Folder', 'Created By', 'Created On', and 'Subscribed'. A red box highlights the 'Reports' icon in the sidebar under 'Customer Orders'.

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

The screenshot shows the 'Create Report' dialog. It has a sidebar with 'Category' sections like 'Recently Used' and 'All' (highlighted with a red box). The main area is titled 'Select a Report Type' with a search bar containing 'PRICE' (highlighted with a red arrow). Below it is a list of report types: 'Price Books with Products', 'Items with Prices', and 'Prices' (highlighted with a red box).

4. Customise your report

The screenshot shows the Report Builder interface. On the left, the 'Fields' pane is open, displaying 'Groups' (with 'GROUP ROWS' selected) and 'Columns' (with 'Add column...' highlighted). In the center, a preview table shows 10 rows of data under the columns 'Price: Price', 'Gold price', and 'Silver price'. The 'Run' button is highlighted in blue at the top right.

	Price: Price	Gold price	Silver price
1	p-022	₹60,000.0000	₹71,000.0000
2	p-021	₹63,000.0000	₹72,000.0000
3	p-027	₹62,350.0000	₹70,000.0000
4	p-029	₹58,700.0000	₹69,000.0000
5	p-030	₹66,000.0000	₹78,000.0000
6	p-028	₹62,000.0000	₹70,000.0000
7	p-025	₹58,000.0000	₹69,000.0000
8	p-028	₹59,900.0000	₹73,000.0000
9	p-024	₹62,000.0000	₹73,000.0000
10	p-023	₹58,000.0000	₹69,000.0000
11		₹609,950.0000	₹714,200.0000

- Add fields from the left pane as shown below.

5. Save or run it.

The screenshot shows the Report Builder interface after saving or running the report. The 'Fields' pane remains the same, but the preview table now displays 11 rows of data, indicating that all records have been previewed. The 'Run' button is highlighted in blue at the top right.

	Price: Price	Gold price	Silver price
1	p-022	₹60,000.0000	₹71,000.0000
2	p-021	₹63,000.0000	₹72,000.0000
3	p-027	₹62,350.0000	₹70,000.0000
4	p-029	₹58,700.0000	₹69,000.0000
5	p-030	₹66,000.0000	₹78,000.0000
6	p-028	₹62,000.0000	₹70,000.0000
7	p-025	₹58,000.0000	₹69,000.0000
8	p-028	₹59,900.0000	₹73,000.0000
9	p-024	₹62,000.0000	₹73,000.0000
10	p-023	₹58,000.0000	₹69,000.0000
11		₹609,950.0000	₹714,200.0000

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

Activity 37: Reports

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

Module: Dashboards

Activity 38: Create Report

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

The screenshot shows the Jewelry Inventory System interface. The top navigation bar has a search bar and various icons. Below it, a left sidebar lists categories like Reports, Recent, Folders, and Favorites. The main area displays a grid of reports with columns for Folder, Created By, Created On, and Subscribed. A context menu is open over a report titled 'Reports', with options like 'Edit' highlighted by a red box. The top right corner has a 'New Report' button.

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

The screenshot shows the Report Builder interface with the 'Create Report' dialog open. On the left, there's a sidebar with a 'Category' section containing 'Recently Used' and 'All' (which is selected and highlighted with a red box). The main area is titled 'Select a Report Type' and contains a search bar with 'Q PRICE' and a list of report types. The first item in the list, 'Prices', is also highlighted with a red box and has a red arrow pointing to it. The dialog has an 'X' button in the top right corner.

4. Customise your report

The screenshot shows the Report Builder interface. On the left, the 'Fields' pane is open, displaying 'Groups' (with 'GROUP ROWS' selected) and 'Columns' (with 'Add column...' highlighted). The main area shows a preview grid with 10 rows and 3 columns. The columns are labeled 'Price: Price', 'Gold price', and 'Silver price'. The data in the grid is as follows:

	Price: Price	Gold price	Silver price
1	p-022	₹60,000.0000	₹71,000.0000
2	p-021	₹63,000.0000	₹72,000.0000
3	p-027	₹62,350.0000	₹70,000.0000
4	p-029	₹58,700.0000	₹69,000.0000
5	p-030	₹66,000.0000	₹78,000.0000
6	p-028	₹62,000.0000	₹70,000.0000
7	p-025	₹58,000.0000	₹69,000.0000
8	p-028	₹59,900.0000	₹73,000.0000
9	p-024	₹62,000.0000	₹73,000.0000
10	p-023	₹58,000.0000	₹69,000.0000
11		₹609,950.0000	₹714,200.0000

- Add fields from the left pane as shown below.

5. Save or run it.

The screenshot shows the Report Builder interface with the preview grid now fully populated with data. The columns are labeled 'Price: Price', 'Gold price', and 'Silver price'. The data in the grid is as follows:

	Price: Price	Gold price	Silver price
1	p-022	₹60,000.0000	₹71,000.0000
2	p-021	₹63,000.0000	₹72,000.0000
3	p-027	₹62,350.0000	₹70,000.0000
4	p-029	₹58,700.0000	₹69,000.0000
5	p-030	₹66,000.0000	₹78,000.0000
6	p-028	₹62,000.0000	₹70,000.0000
7	p-025	₹58,000.0000	₹69,000.0000
8	p-028	₹59,900.0000	₹73,000.0000
9	p-024	₹62,000.0000	₹73,000.0000
10	p-023	₹58,000.0000	₹69,000.0000
11		₹609,950.0000	₹714,200.0000

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

Module: Flows

Activity 39: Create a Flow

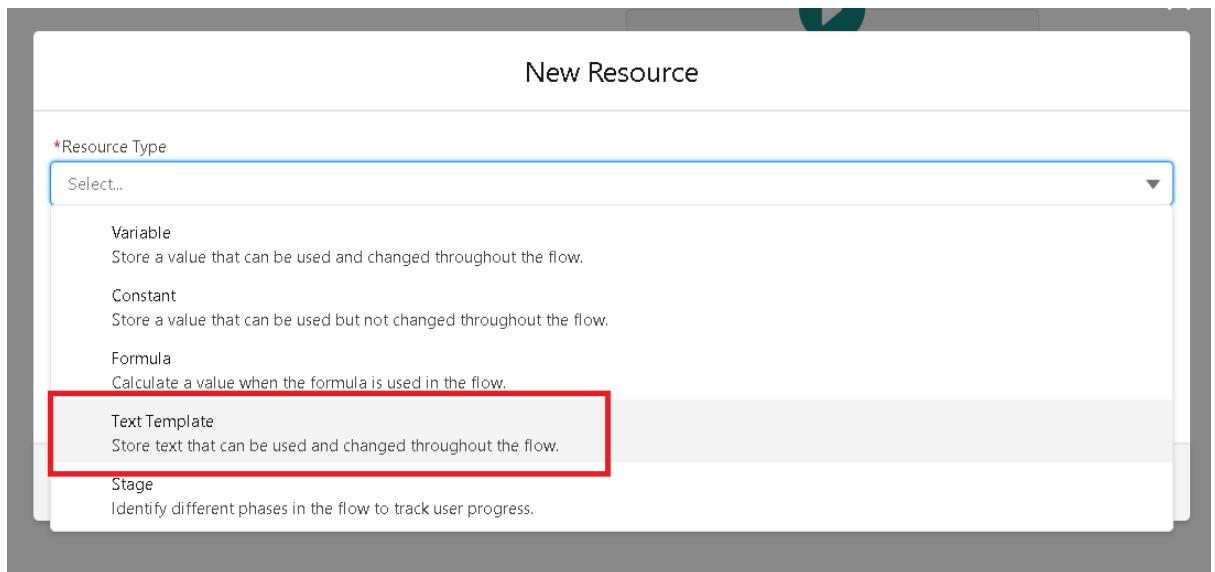
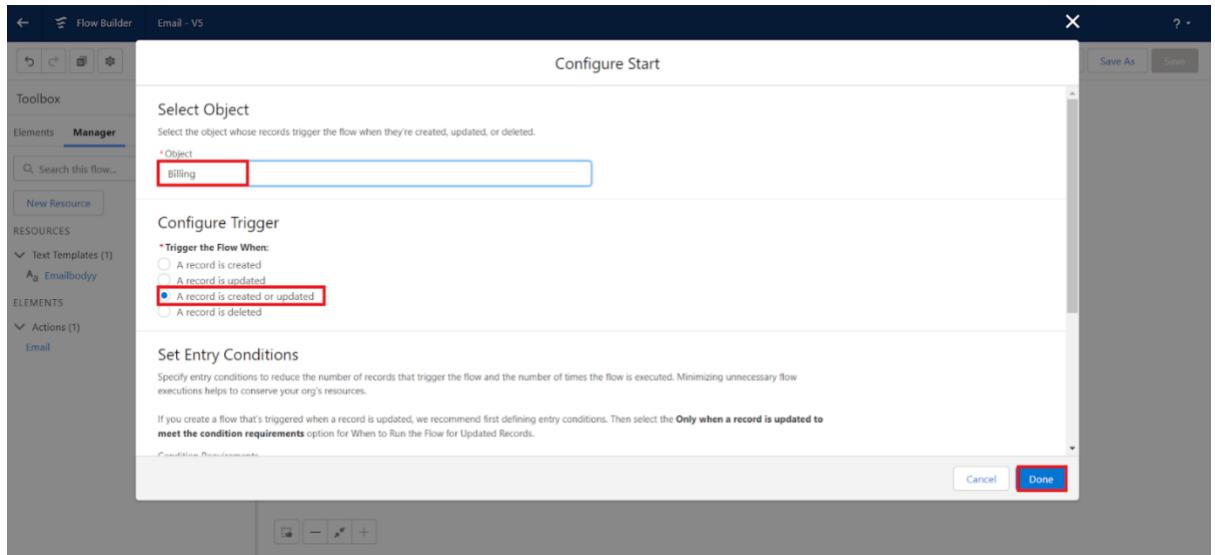
- Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.

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

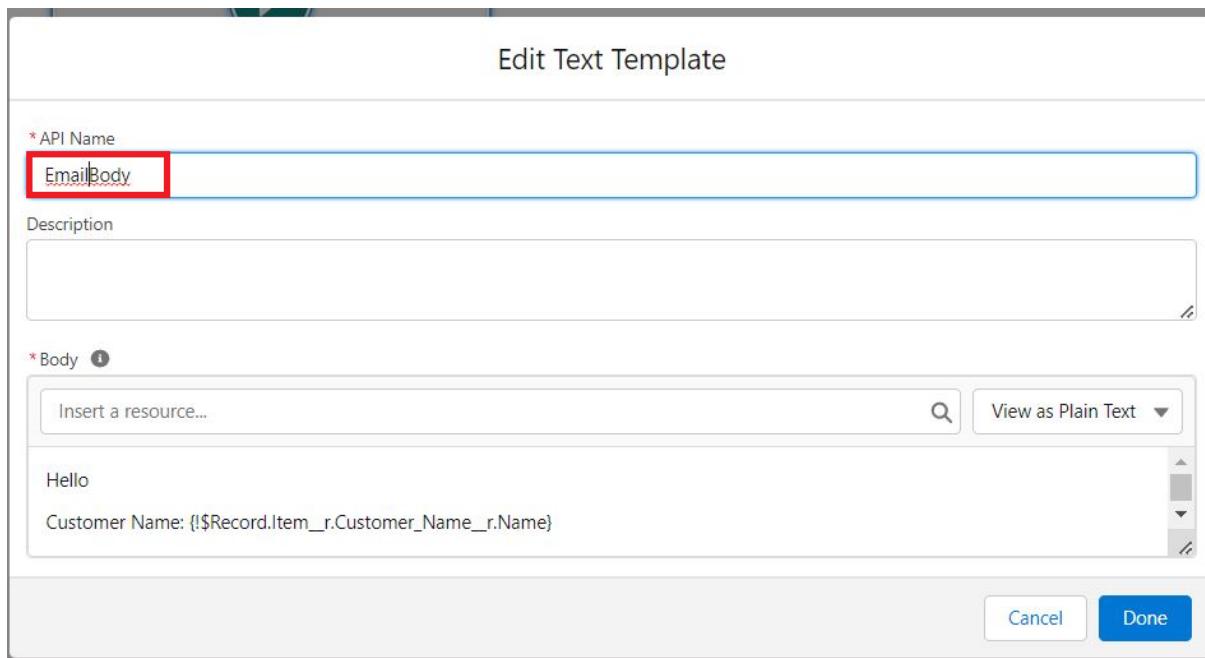
3. Select the Object as a “Billing” in the drop down list.
4. Select the Trigger Flow when: “A record is Created or Updated”.
5. Select the Optimise the flow for: “Actions and Related Records” and Click on Done.

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

7. Now select the manager option in the toolbox, click new resource.
8. Select the resource type as text template.



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



10. Change the view as Rich Text? View to Plain Text.
11. In the body field paste the syntax that is given below.

Hello

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

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

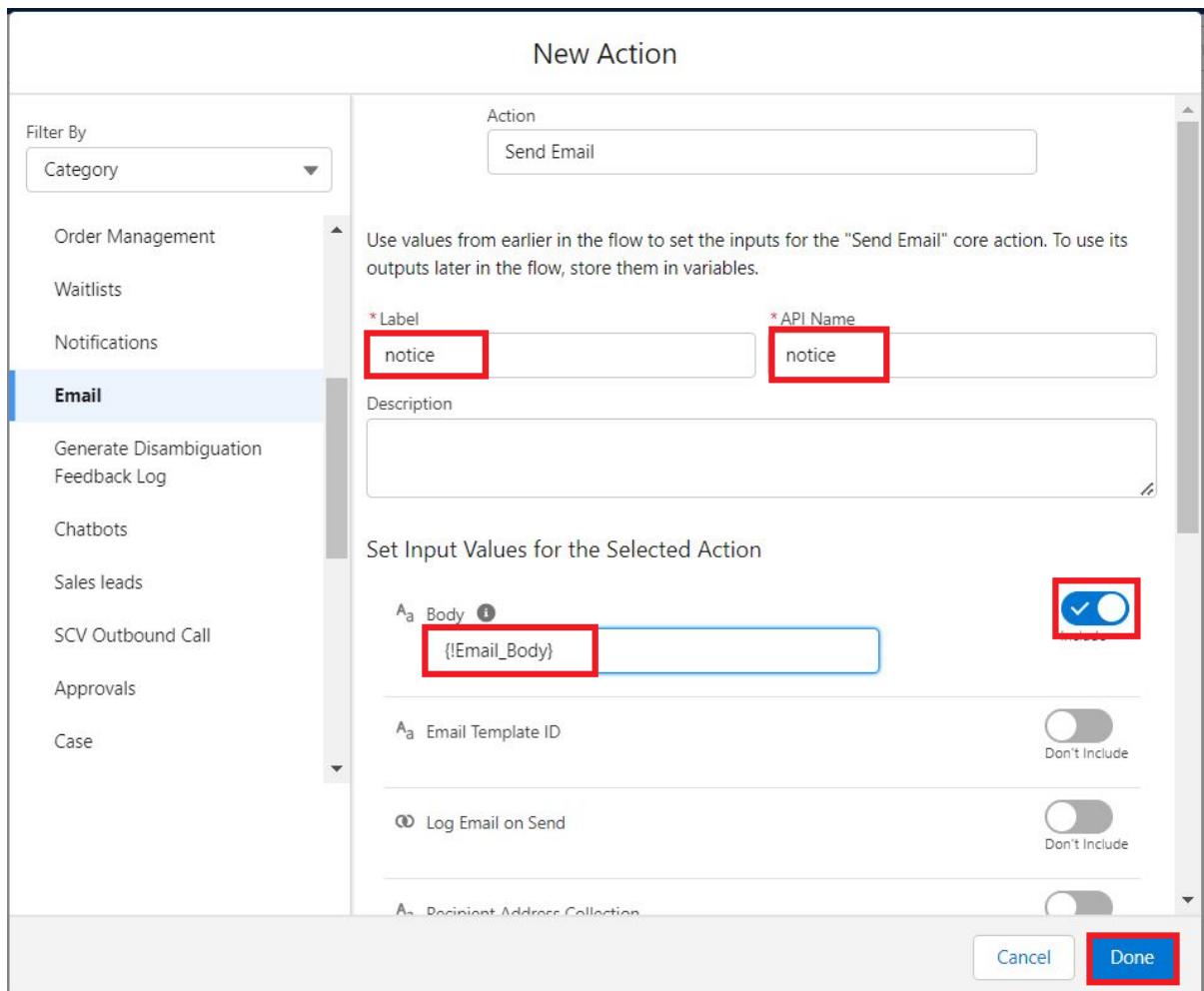
Item Type: {!\$Record.Item__r.Item_Type__c}

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.

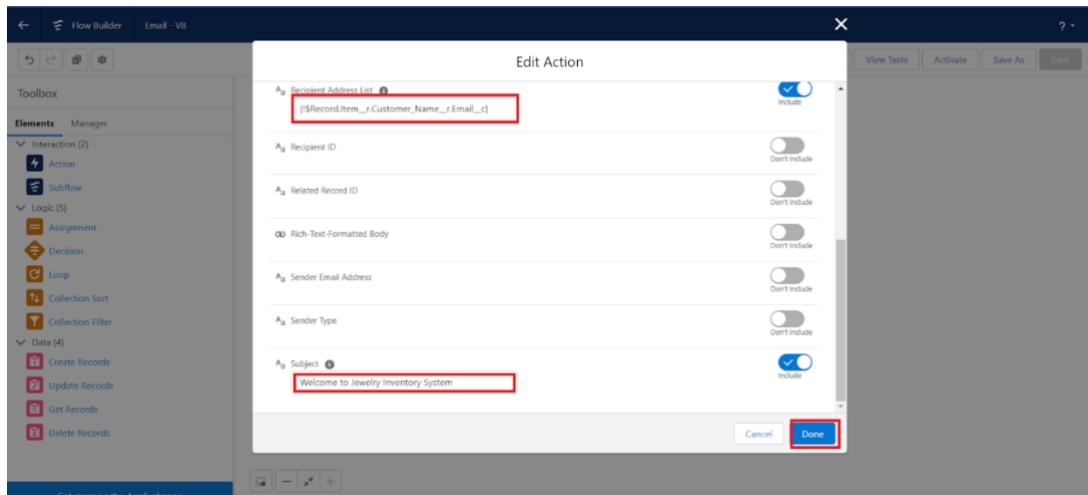


19. Include Recipient Address list, select the email from the record.

({!\$Record.Item_r.Customer_Namer.Email_c})

20. Include the subject as “Welcome to Jewellery Inventory System”.

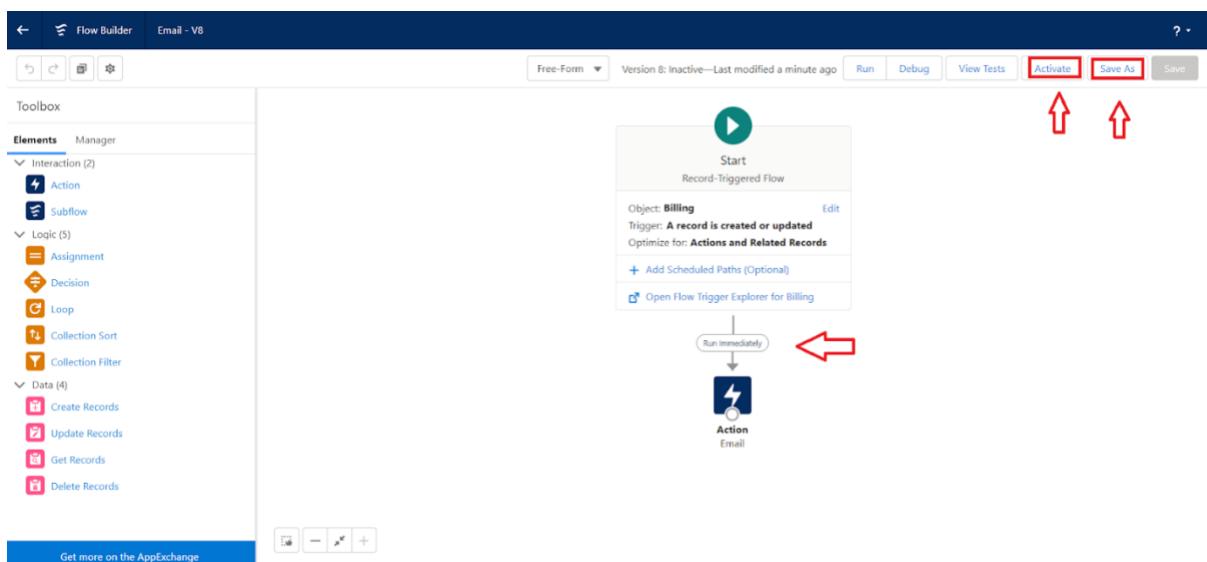
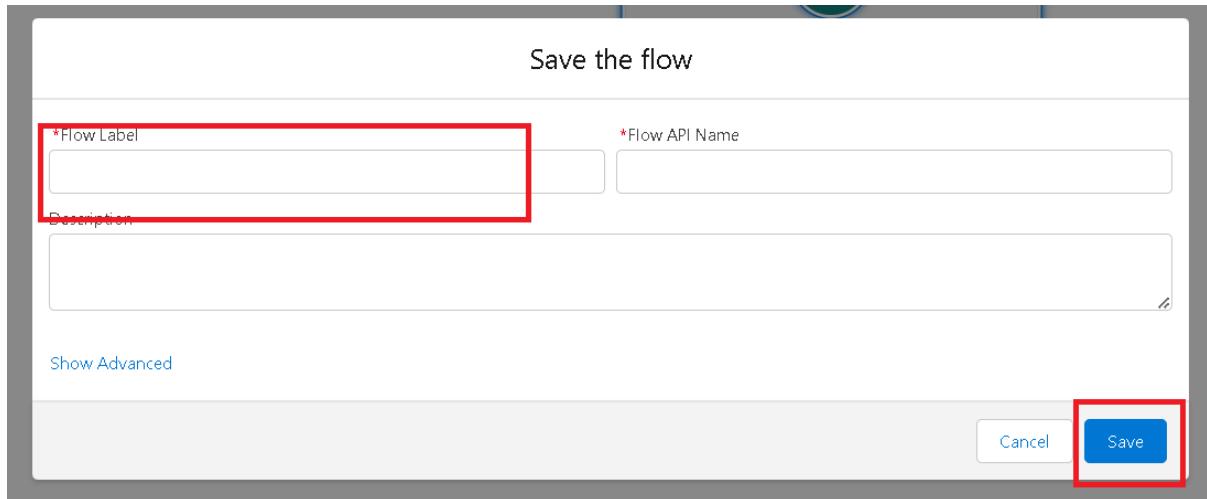
21. Click done.



22. Now drag the path from the start to the action element.

23. Click on save. Given the Flow label, Flow Api name will be auto populated.

24. And click save, and click on activate.



Conclusion

The CRM Application for Jewel Management successfully streamlines customer interactions, sales, inventory, and marketing in one integrated platform. It enhances customer experience, boosts operational efficiency, and provides valuable business insights. With a strong foundation now in place, the system is ready to scale and support future growth in a competitive jewellery market.

