

# **CRM Application for Jewel Management - (Developer)**

COLLEGE NAME: CHIKKANNA GOVERNMENT ARTS COLLEGE,TIRUPURCOLLEGE  
CODE: Bru06

TEAM ID: NM2025TMID26224

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# CRM Application for Jewel Management - (Developer)

- **INTRODUCTION**


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.


# ● My Profile







**JAYASURYA G**

 Home

 Projects

 Support



Last Login :

## PROFILE

---


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**CATEGORY** : Salesforce Developer

**PROJECT TITLE** : CRM Application for Jewel Management - (Developer)

**ROCKET CHAT USERNAME** : valarsurya65@gmail.com

**ROCKET CHAT PASSWORD** : 

**DOWNLOAD ROCKET CHAT** :  

# ● My Team Members



Dear Student,

Greetings from SmartBridge,

Your team has successfully enrolled for the project. Please find the team details below

**Team ID :** NM2025TMID26224

**Team Size :** 4

**Team Leader :** JAYASURYA G

**Team member :** PRASATH K

**Team member :** MARUTHACHALAM M

**Team member :** AYYANAR S

Regards,  
Team SmartBridge

# ● My Project

CRM Application For  
Jewel Management -  
(Developer)


## CRM Application For Jewel Management - (Developer)

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.

### What you'll learn

1. Real Time Salesforce Project
2. Data Modelling
3. Creating an Application
4. User Interface Customization
5. Object & Relationship in Salesforce
6. Formula fields and Validation rules.
7. Field Dependencies
8. Record Types
9. Cross object formula fields.
10. Conditional formatting.
11. Flows
12. Email alerts and email templates
13. Reports & Dashboards


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|---|---|
| First name  | Last name   |
| <input type="text" value="Jayasurya"/>            | <input type="text" value="G"/>                      |
| Job title   | Work email  |
| <input type="text" value="Salesforce"/>           | <input type="text" value="valarsurya65@gmail.com"/> |
| Company   | Country/Region                                      |
| <input type="text" value="Chikkanna Government"/> | <input type="text" value="India"/>                  |

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# ● Salesforce Login



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02:17

# ● Create A Object Jewel Costomer

The screenshot shows the Salesforce Lightning Setup interface. The browser address bar displays the URL: `orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The top navigation bar includes a search bar labeled "Search Setup" and several utility icons. Below the navigation bar, the "Object Manager" tab is selected. The main content area features the "Object Manager" header with a search bar containing "jew", a "Schema Builder" button, and a "Create" button. Below the header, a table lists two custom objects, both labeled "Jewel Customer".

| LABEL          | API NAME          | TYPE          | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|----------------|-------------------|---------------|-------------|---------------|----------|
| Jewel Customer | Customer_name__c  | Custom Object |             | 9/1/2025      | ✓        |
| Jewel Customer | Jewel_Customer__c | Custom Object |             | 9/1/2025      | ✓        |



# ● Create A Object Item

The screenshot shows the Salesforce Lightning Object Manager interface. The browser address bar displays the URL: `orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page header includes a search bar labeled "Search Setup" and a navigation menu with "Setup", "Home", and "Object Manager". The main content area is titled "Object Manager" with a sub-header "19 Items, Sorted by Label". A search bar contains the text "item". To the right of the search bar are buttons for "Schema Builder" and "Create". Below the header is a table listing various objects. The table has three columns: the object name, the API name, and the object type. The "item" object is highlighted in blue and is a Custom Object, created on 8/24/2025. The table is scrollable, and the URL at the bottom of the browser window is `https://orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/01lgL000001id0H/view`.

| Object Name                       | API Name                       | Object Type     |
|-----------------------------------|--------------------------------|-----------------|
| Duplicate Record Item             | DuplicateRecordItem            | Standard Object |
| Fulfillment Order Item Adjustment | FulfillmentOrderItemAdjustment | Standard Object |
| Fulfillment Order Item Tax        | FulfillmentOrderItemTax        | Standard Object |
| Incident Related Item             | IncidentRelatedItem            | Standard Object |
| Inventory Item Reservation        | InventoryItemReservation       | Standard Object |
| <u>item</u>                       | Item__c                        | Custom Object   |
| Learning Item                     | LearningItem                   | Standard Object |
| Orchestration Work Item           | FlowOrchestrationWorkItem      | Standard Object |
| Problem Related Item              | ProblemRelatedItem             | Standard Object |
| Return Order Item Adjustment      | ReturnOrderItemAdjustment      | Standard Object |
| Return Order Item Tax             | ReturnOrderItemTax             | Standard Object |

# ● Create A Object Customer Order

orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Search Setup

Setup Home Object Manager

**Object Manager**  
5 Items, Sorted by Label

Search: cust Schema Builder Create

| LABEL                          | API NAME                   | TYPE            | DESCRIPTION | LAST MODIFIED | DEPLOYED |   |
|--------------------------------|----------------------------|-----------------|-------------|---------------|----------|---|
| Custom Library                 | DataMaskCustomValueLibrary | Standard Object |             |               |          |   |
| Customer                       | Customer                   | Standard Object |             |               |          |   |
| <a href="#">CustomerOrder</a>  | CustomerOrder__c           | Custom Object   |             | 9/1/2025      | ✓        | ▼ |
| <a href="#">Jewel Customer</a> | Customer_name__c           | Custom Object   |             | 9/1/2025      | ✓        | ▼ |
| <a href="#">Jewel Customer</a> | Jewel_Customer__c          | Custom Object   |             | 9/1/2025      | ✓        | ▼ |

https://orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/01qL000001id6/view

# ● Create A Object Price

← → ↺ orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Search Setup

Setup Home Object Manager

SETUP  
**Object Manager**  
4 Items, Sorted by Label

price Schema Builder Create

| LABEL                            | API NAME                | TYPE            | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|----------------------------------|-------------------------|-----------------|-------------|---------------|----------|
| Cart Item Price Adjustment       | CartItemPriceAdjustment | Standard Object |             |               |          |
| <a href="#">Price</a>            | Price__c                | Custom Object   |             | 8/24/2025     | ✓        |
| <a href="#">Price Book</a>       | Pricebook2              | Standard Object |             |               |          |
| <a href="#">Price Book Entry</a> | PricebookEntry          | Standard Object |             |               |          |

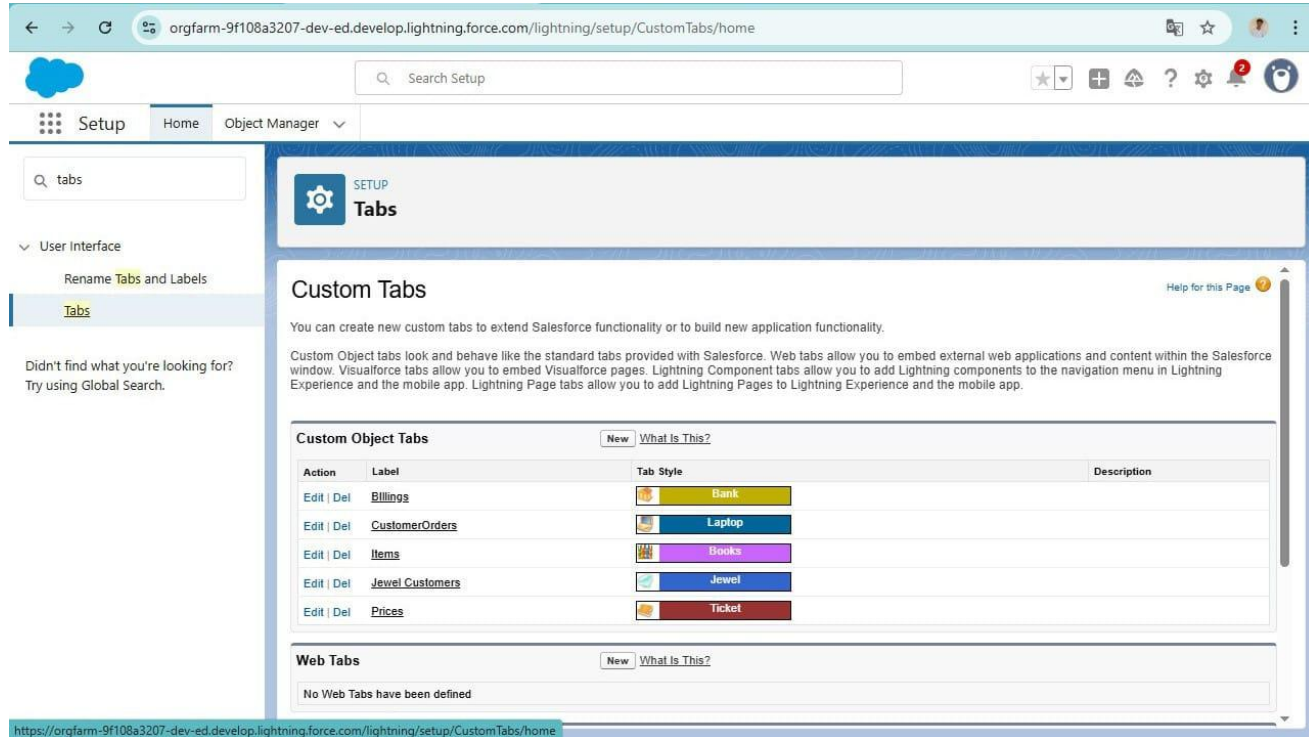
https://orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/01lgL000001idDB/view

# ● Create A Object Billing

The screenshot shows the Salesforce Lightning Setup interface. The browser address bar displays the URL: `orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and several utility icons. Below the navigation bar, the "Setup" menu is open, showing "Home" and "Object Manager" (selected). The "Object Manager" page header includes the "SETUP" icon, the text "Object Manager", and a sub-header "1 Items, Sorted by Label". To the right of the header is a search bar containing "bil" and buttons for "Schema Builder" and "Create". The main content area displays a table with the following data:

| LABEL   | API NAME   | TYPE          | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|---------|------------|---------------|-------------|---------------|----------|
| Billing | Billing__c | Custom Object |             | 9/1/2025      | ✓        |

- Create A Tab Jewel Customer,Item, Customer Order, Price, Billing



The screenshot shows the Salesforce Setup interface for Custom Tabs. The left sidebar contains a search bar with 'tabs' and a list of navigation items: 'User Interface', 'Rename Tabs and Labels', and 'Tabs' (which is highlighted). The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title, there is a paragraph explaining that custom tabs can extend Salesforce functionality or build new application functionality. It further details that Custom Object tabs look like standard tabs, Visualforce tabs allow embedding pages, Lightning Component tabs add components to the navigation menu, and Lightning Page tabs add pages to Lightning Experience and the mobile app. The page is divided into two sections: 'Custom Object Tabs' and 'Web Tabs'. The 'Custom Object Tabs' section has a 'New' button and a 'What Is This?' link. It contains a table with five rows of tabs: 'Billing3' (Bank style), 'CustomerOrders' (Laptop style), 'Items' (Books style), 'Jewel Customers' (Jewel style), and 'Prices' (Ticket style). Each row includes 'Edit' and 'Del' links. The 'Web Tabs' section also has a 'New' button and a 'What Is This?' link, and it states 'No Web Tabs have been defined'.

orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

Search Setup

Setup Home Object Manager

Search tabs

User Interface

Rename Tabs and Labels

Tabs

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

### Custom Tabs

Help for this Page

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

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

#### Custom Object Tabs

New What Is This?

| Action     | Label           | Tab Style | Description |
|------------|-----------------|-----------|-------------|
| Edit   Del | Billing3        | Bank      |             |
| Edit   Del | CustomerOrders  | Laptop    |             |
| Edit   Del | Items           | Books     |             |
| Edit   Del | Jewel Customers | Jewel     |             |
| Edit   Del | Prices          | Ticket    |             |

#### Web Tabs

New What Is This?

No Web Tabs have been defined

https://orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

# ● Create A Lightning App

The screenshot shows the Salesforce Lightning Experience App Manager interface. The browser address bar displays the URL: `orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home`. The page header includes a search bar labeled "Search Setup" and navigation tabs for "Setup", "Home", and "Object Manager". The left sidebar contains a search bar with "app mana" and a list of navigation items: "Apps", "App Manager", "External Client Apps", and "External Client App Manager". The main content area is titled "Lightning Experience App Manager" and features two buttons: "New Lightning App" and "New External Client App". Below the header, a table lists 27 items, sorted by App Name. The table columns are: App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The table is filtered by "All appmenuitems - TabSet Type, App Type".

27 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

|    | App Name ↑                   | Developer Name               | Description                                  | Last Modified ...     | Ap...     | Vi... |
|----|------------------------------|------------------------------|--|-----------------------|-----------|-------|
| 3  | App Launcher                 | AppLauncher                  | App Launcher tabs                            | 8/12/2025, 12:34 A... | Classic   | ✓     |
| 4  | Approvals                    | Approvals                    | Manage approvals and approval flows          | 8/12/2025, 12:34 A... | Lightning | ✓     |
| 5  | Automation                   | FlowsApp                     | Automate business processes and repetiti...  | 8/12/2025, 12:41 A... | Lightning | ✓     |
| 6  | Bolt Solutions               | LightningBolt                | Discover and manage business solutions d...  | 8/12/2025, 12:34 A... | Lightning | ✓     |
| 7  | Community                    | Community                    | Salesforce CRM Communities                   | 8/12/2025, 12:34 A... | Classic   | ✓     |
| 8  | Content                      | Content                      | Salesforce CRM Content                       | 8/12/2025, 12:34 A... | Classic   | ✓     |
| 9  | Data Cloud                   | Audience360                  | Build a thorough and complete understand...  | 8/12/2025, 12:34 A... | Lightning | ✓     |
| 10 | Data Manager                 | DataManager                  | Use Data Manager to view limits, monitor ... | 8/12/2025, 12:34 A... | Lightning | ✓     |
| 11 | Digital Experiences          | SalesforceCMS                | Manage content and media for all of your ... | 8/12/2025, 12:34 A... | Lightning | ✓     |
| 12 | Jewellery Inventory Syste... | Jewellery_Inventory_Syste... | Elevate your look with elegance              | 9/1/2025, 9:25 AM     | Lightning | ✓     |
| 13 | Lightning Usage App          | LightningInstrumentation     | View Adoption and Usage Metrics for Ligh...  | 8/12/2025, 12:34 A... | Lightning | ✓     |
| 14 | Marketing CRM Classic        | Marketing                    | Track sales and marketing efforts with CR... | 8/12/2025, 12:34 A... | Classic   | ✓     |

# ● Customer Order Object In Fields

The screenshot shows the Salesforce Lightning Setup interface for the CustomerOrder object. The breadcrumb trail is SETUP > OBJECT MANAGER. The left sidebar contains a menu with the following items: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'CustomerOrder' and 'Fields & Relationships'. It indicates there are 6 items, sorted by Field Label. Above the table are buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. The table has five columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data rows are as follows:

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



# ● Object In Fields Item

orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000001id0H/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

**Item**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

**Fields & Relationships**  
22 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

| FIELD LABEL             | FIELD NAME                 | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|-------------------------|----------------------------|--------------------|-------------------|---------|
| Amount                  | Amount__c                  | Formula (Currency) |                   |         |
| Created By              | CreatedById                | Lookup(User)       |                   |         |
| Expected Days Of Return | Expected_Days_Of_Return__c | Picklist           | Priority          |         |
| Gold Price              | Gold_Price__c              | Formula (Currency) |                   |         |
| Item Id                 | Name                       | Auto Number        |                   | ✓       |
| Item Type               | Item_Type__c               | Picklist           |                   |         |
| KDM                     | KDM__c                     | Formula (Currency) |                   |         |
| Last Modified By        | LastModifiedById           | Lookup(User)       |                   |         |
| Making Charges          | Making_Charges__c          | Formula (Currency) |                   |         |
| Ornament                | Ornament__c                | Text(20)           |                   |         |





Search Setup



Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

### Fields & Relationships

22 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

|                   |                      |                    |   |  |
|-------------------|----------------------|--------------------|---|--|
| Ornament          | Ornament__c          | Text(20)           |   |  |
| Owner             | OwnerId              | Lookup(User,Group) | ✓ |  |
| Percentage        | Percentage__c        | Number(2, 0)       |   |  |
| Prices            | Prices__c            | Lookup(Price)      | ✓ |  |
| Priority          | Priority__c          | Picklist           |   |  |
| Purity            | Purity__c            | Number(2, 0)       |   |  |
| Purity Gold Price | Purity_Gold_Price__c | Formula (Currency) |   |  |
| Record Type       | RecordTypeId         | Record Type        | ✓ |  |
| Silver Price      | Silver_Price__c      | Formula (Number)   |   |  |
| Stone Weight      | Stone_Weight__c      | Number(5, 5)       |   |  |



Search Setup



SETUP > OBJECT MANAGER

## Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

### Fields & Relationships

22 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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

# ● Price Object In Fields

orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001idDB/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

## Price

Details

**Fields & Relationships**  
6 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

| FIELD LABEL      | FIELD NAME       | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Created By       | CreatedById      | Lookup(User)       |                   |         |
| Gold Price       | Gold_Price__c    | Currency(8, 0)     |                   |         |
| Last Modified By | LastModifiedById | Lookup(User)       |                   |         |
| Owner            | OwnerId          | Lookup(User,Group) |                   | ✓       |
| Price id         | Name             | Auto Number        |                   | ✓       |
| Silver Price     | Silver_Price__c  | Currency(8, 5)     |                   |         |

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

# ● Jewel Customer Object In Fields

The screenshot shows the Salesforce Object Manager interface for the 'Jewel Customer' object. The browser address bar indicates the URL: `orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000001ubYz/FieldsAndRelationships/view`. The page title is 'Jewel Customer' under the 'Object Manager' tab. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Search Layouts', 'List View Button Layout', 'Restriction Rules', 'Scoping Rules', 'Object Access', and 'Triggers'. The main content area is titled 'Fields & Relationships' and shows 11 items sorted by Field Label. A table lists the fields with columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. Fields include City, Country, Created By, Customer name, Email, Last Modified By, Owner, Phone, State, Street, and Zip/Postal code. The 'Owner' field is marked as indexed and has a checkmark in the Controlling Field column.

SETUP > OBJECT MANAGER  
**Jewel Customer**

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

**Fields & Relationships**  
11 Items, Sorted by Field Label

Quick Find: [ ] New Deleted Fields Field Dependencies Set History Tracking

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

# ● Billing Object In Fields

← → ↺ orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000001IdEn/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

## Billing

Details

**Fields & Relationships**

16 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

| FIELD LABEL       | FIELD NAME           | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|-------------------|----------------------|--------------------|-------------------|---------|
| Amount            | Amount__c            | Formula (Currency) |                   |         |
| Billing id        | Name                 | Auto Number        |                   | ✓       |
| Created By        | CreatedById          | Lookup(User)       |                   |         |
| Gold/Silver Price | Gold_Silver_Price__c | Formula (Currency) |                   |         |
| Item              | Item__c              | Lookup(Item)       |                   | ✓       |
| KDM Charge        | KDM_Charge__c        | Formula (Currency) |                   |         |
| Last Modified By  | LastModifiedById     | Lookup(User)       |                   |         |
| Making Charges    | Making_Charges__c    | Formula (Currency) |                   |         |



Search Setup



Setup

Home

Object Manager ▾

SETUP > OBJECT MANAGER

## Billing

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

### Fields & Relationships

16 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

|                    |                       |                    |   |
|--------------------|-----------------------|--------------------|---|
| Ornament           | Ornament__c           | Formula (Text)     | ▼ |
| Owner              | OwnerId               | Lookup(User,Group) | ✓ |
| Paid Amount        | Paid_Amount__c        | Currency(18, 0)    | ▼ |
| Paying Amount      | Paying_Amount__c      | Currency(18, 0)    | ▼ |
| Stone weight       | Stone_weight__c       | Formula (Number)   | ▼ |
| Stones/other price | Stones_other_price__c | Formula (Currency) | ▼ |
| Total Amount       | Total_Amount__c       | Formula (Currency) | ▼ |
| Weight             | Weight__c             | Formula (Number)   | ▼ |

# ● Create A Item Fields Dependencies

The screenshot shows the Salesforce Lightning Setup interface. The browser address bar displays the URL: `orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001id0H/FieldsAndRelationships/viewDependencyList`. The top navigation bar includes a search bar labeled "Search Setup" and several utility icons. Below the navigation bar, the "Object Manager" tab is selected, showing a breadcrumb trail: `SETUP > OBJECT MANAGER`. The main content area is titled "Item" and "Item Field Dependencies". A left-hand sidebar lists various setup options, with "Fields & Relationships" currently selected. The main content area contains a "Field Dependencies" table with a "New" button. The table has four columns: "Action", "Controlling Field", "Dependent Field", and "Modified By". One dependency is listed: "Priority" (Controlling Field) is dependent on "Expected Days Of Return" (Dependent Field), modified by "Jayasurya G." on "9/1/2025, 9:54 AM".

SETUP > OBJECT MANAGER

## Item

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

### Item Field Dependencies

[Back to Custom Object: Item](#)

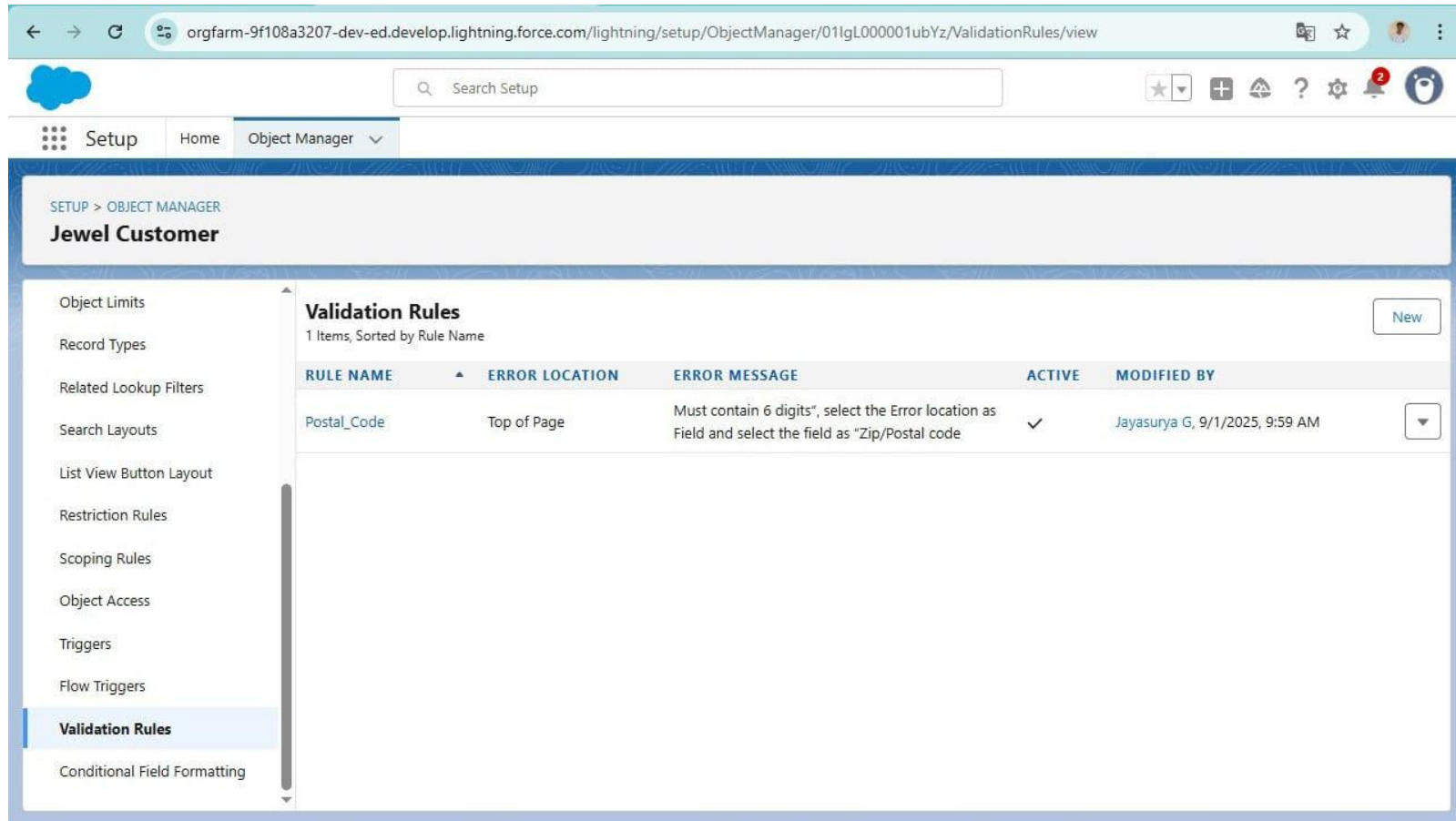
This page allows you to define dependencies between fields (e.g., dependent picklists).

**Field Dependencies** [New](#)

| Action                                     | Controlling Field | Dependent Field         | Modified By                                      |
|--|-------------------|-------------------------|--|
| <a href="#">Edit</a>   <a href="#">Del</a> | Priority          | Expected Days Of Return | <a href="#">Jayasurya G.</a> , 9/1/2025, 9:54 AM |



# ● Create A Jewel Customer In Validation Rule



The screenshot shows the Salesforce Setup interface. The browser address bar displays the URL: `orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001ubYz/ValidationRules/view`. The top navigation bar includes a search bar labeled "Search Setup" and various utility icons. The left sidebar contains a menu with the following items: Setup, Home, Object Manager (selected), Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules (highlighted), and Conditional Field Formatting.

The main content area is titled "SETUP > OBJECT MANAGER" and "Jewel Customer". It displays the "Validation Rules" section, which shows "1 Items, Sorted by Rule Name". A "New" button is located in the top right corner of this section.

| RULE NAME   | ERROR LOCATION | ERROR MESSAGE   | ACTIVE | MODIFIED BY                    |
|-------------|----------------|---|--------|--------------------------------|
| Postal_Code | Top of Page    | Must contain 6 digits", select the Error location as Field and select the field as "Zip/Postal code | ✓      | Jayasurya G, 9/1/2025, 9:59 AM |



# ● Create A Gold Smith Profile

The screenshot shows the Salesforce Setup interface. The browser address bar displays the URL: `orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home`. The left sidebar contains the following navigation options:

- Hyperforce Assistant
- Users
- Profiles**
- Data
  - Mass Transfer Approval Requests
- Feature Settings
  - Approval Settings
- Data.com
  - Prospector Preferences
  - Prospector Users
- Functions
- Marketing
  - Lead Processes
- Sales
  - Products

The main content area is titled "Profiles" and includes a search bar with the text "pro". Below the search bar, there is a "New Profile" button and a "Help for this Page" link. The table below lists the profiles:

| Action                                    | Profile Name ↑                    | User License | Custom                              |
|---|-----------------------------------|--------------|-------------------------------------|
| <input type="checkbox"/> Edit   Clone     | <a href="#">Gold Partner User</a> | Gold Partner | <input type="checkbox"/>            |
| <input type="checkbox"/> Edit   Del   ... | <a href="#">Gold Smith</a>        | Salesforce   | <input checked="" type="checkbox"/> |

At the bottom of the page, there is a pagination bar showing "1-2 of 2" and "0 Selected". The page number "1" is highlighted, and the total number of pages is "1 of 1".

# ● Create A Worker Profile

orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Search Setup

Setup Home Object Manager

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Approval Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

SETUP Profiles

Profiles

Help for this Page

All Profiles Edit | Delete | Create New View

New Profile

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

| Action                                    | Profile Name ↑     | User License        | Custom                              |
|---|--------------------|---------------------|-------------------------------------|
| <input type="checkbox"/> Edit   Clone     | Work.com Only User | Work.com Only       | <input type="checkbox"/>            |
| <input type="checkbox"/> Edit   Del   ... | Worker Profile     | Salesforce Platform | <input checked="" type="checkbox"/> |

1-2 of 2 0 Selected

Page 1 of 1

# ● Creating Gold Smith Role

The screenshot shows the Salesforce Setup interface for the 'Roles' section. The browser address bar displays the URL: `orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/Roles/home`. The left sidebar contains a navigation menu with 'Setup', 'Home', and 'Object Manager'. The 'Roles' section is selected, showing a search bar with 'roles' and a list of categories: Users, Roles, Feature Settings, Sales, Service, and Case Teams. The main content area is titled 'Creating the Role Hierarchy' and includes a 'Help for this Page' link. Below the title, there is a text box stating: 'You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.' The 'Your Organization's Role Hierarchy' section shows a tree view of the role hierarchy. The hierarchy starts with 'Salesforce' at the top, followed by 'CEO', 'CFO', 'COO', 'Gold Smith', 'SVP, Customer Service & Support', 'SVP, Human Resources', and 'SVP, Sales & Marketing'. Each role in the hierarchy has an 'Add Role' link next to it. The 'Gold Smith' role is highlighted in blue. At the bottom of the page, there is a JavaScript source code snippet: `javascript:srcUp(%27%2F00EgL000003zyGr%3Fsetupid%3DRoles%26isdt%3Dp1%27);`

# ● Create A User

The screenshot shows the Salesforce Setup interface for managing users. The browser address bar displays the URL: `orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home`. The left sidebar contains navigation options: Setup, Home, Object Manager, and a search bar with 'users' entered. Below the sidebar, a list of user management options is shown, with 'Users' selected. The main content area, titled 'All Users', provides instructions on creating, viewing, and managing users, along with a link to 'Let's Go' for more licenses. A table lists existing users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table includes users like 'Chatter Expert', 'EPIC\_OrgFarm', 'G\_Jayasurya', 'Mikaelson\_Kol', 'Mikaelson\_Niklaus', 'User\_Integration', and 'User\_Security'. The 'Mikaelson\_Kol' and 'Mikaelson\_Niklaus' users are checked. At the bottom, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Search Setup

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

## SETUP Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users Edit Create New View

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

New User Reset Password(s) Add Multiple Users

| Action                                   | Full Name ↑       | Alias   | Username  | Role       | Active | Profile                          |
|--|-------------------|---------|---|------------|--------|----------------------------------|
| <input type="checkbox"/> Edit            | Chatter Expert    | Chatter | chatty.00dgl0000093yqxuag_vf06iol1yrgs@chatter.salesforce.com |            | ✓      | Chatter Free User                |
| <input type="checkbox"/> Edit            | EPIC_OrgFarm      | OEPIC   | epic.5607e9a961ca@orgfarm.salesforce.com                      |            | ✓      | System Administrator             |
| <input type="checkbox"/> Edit            | G_Jayasurya       | val     | valarsurya65777@agentforce.com                                |            | ✓      | System Administrator             |
| <input checked="" type="checkbox"/> Edit | Mikaelson_Kol     | mika    | valarsurya657@gmail.com                                       | Worker     | ✓      | Worker Profile                   |
| <input checked="" type="checkbox"/> Edit | Mikaelson_Niklaus | nmika   | valarsurya65@gmail.com  | Gold Smith | ✓      | Gold Smith                       |
| <input type="checkbox"/> Edit            | User_Integration  | integ   | integration@00dgl0000093yqxuag.com                            |            | ✓      | Analytics Cloud Integration User |
| <input type="checkbox"/> Edit            | User_Security     | sec     | insightssecurity@00dgl0000093yqxuag.com                       |            | ✓      | Analytics Cloud Security User    |

New User Reset Password(s) Add Multiple Users

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

# ● Create A Worker User

The screenshot shows the Salesforce Setup interface for managing users. The browser address bar indicates the URL: `orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home`. The left sidebar contains navigation options: Setup, Home, Object Manager, and a search bar for 'users'. The main content area is titled 'Users' and includes a 'Help for this Page' link. Below the title, there is a section for 'All Users' with instructions on creating, viewing, and managing users. A 'View: All Users' dropdown and a 'Create New View' link are present. A table lists the current users, with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table includes users like Chatter Expert, EPIC\_OrgFarm, G\_Jayasurya, Mikaelson\_Kol, Mikaelson\_Niklaus, User\_Integration, and User\_Security. At the bottom, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Search Setup

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

SETUP Users

Help for this Page

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users Edit Create New View

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

New User Reset Password(s) Add Multiple Users

| Action                                   | Full Name ↑       | Alias   | Username  | Role       | Active | Profile                          |
|--|-------------------|---------|---|------------|--------|----------------------------------|
| <input type="checkbox"/> Edit            | Chatter Expert    | Chatter | chatty.00dgl0000093yqxuag_yf06iol1yrgs@chatter.salesforce.com |            | ✓      | Chatter Free User                |
| <input type="checkbox"/> Edit            | EPIC_OrgFarm      | OEPIK   | epic.5607e9a961ca@orgfarm.salesforce.com                      |            | ✓      | System Administrator             |
| <input type="checkbox"/> Edit            | G_Jayasurya       | val     | valarsurya65777@agentforce.com                                |            | ✓      | System Administrator             |
| <input type="checkbox"/> Edit            | Mikaelson_Kol     | mika    | valarsurya657@gmail.com                                       | Worker     | ✓      | Worker Profile                   |
| <input checked="" type="checkbox"/> Edit | Mikaelson_Niklaus | nmika   | valarsurya65@gmail.com  | Gold Smith | ✓      | Gold Smith                       |
| <input type="checkbox"/> Edit            | User_Integration  | integ   | integration@00dgl0000093yqxuag.com                            |            | ✓      | Analytics Cloud Integration User |
| <input type="checkbox"/> Edit            | User_Security     | sec     | insightssecurity@00dgl0000093yqxuag.com                       |            | ✓      | Analytics Cloud Security User    |

New User Reset Password(s) Add Multiple Users

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

# ● Create A Gold Page Layout

The screenshot shows the Salesforce Lightning Setup interface. The browser address bar displays the URL: `orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000001id0H/PageLayouts/view`. The top navigation bar includes a search bar labeled "Search Setup" and several utility icons. Below the navigation bar, the "Object Manager" tab is selected, showing a breadcrumb trail: "SETUP > OBJECT MANAGER". The main content area is titled "Item" and displays a list of "Page Layouts". A left-hand sidebar contains a menu with options: "Details", "Fields & Relationships", "Page Layouts" (which is highlighted), "Lightning Record Pages", "Buttons, Links, and Actions", "Compact Layouts", "Field Sets", "Object Limits", "Record Types", "Related Lookup Filters", "Search Layouts", and "List View Button Layout". The "Page Layouts" section shows 3 items, sorted by Page Layout Name. The table below lists these items:

| PAGE LAYOUT NAME       | CREATED BY                       | MODIFIED BY                    |   |
|------------------------|----------------------------------|--------------------------------|---|
| Item Layout            | Jayasurya G, 8/24/2025, 11:23 PM | Jayasurya G, 9/1/2025, 7:10 PM | ▼ |
| Page Layout for Gold   | Jayasurya G, 9/1/2025, 11:06 AM  | Jayasurya G, 9/1/2025, 7:10 PM | ▼ |
| Page Layout for Silver | Jayasurya G, 9/1/2025, 6:31 PM   | Jayasurya G, 9/1/2025, 7:10 PM | ▼ |

# ● Create A Silver Page Layout

The screenshot shows the Salesforce Setup interface. The browser address bar displays the URL: `orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001id0H/PageLayouts/view`. The top navigation bar includes a search bar labeled "Search Setup" and several utility icons. Below the navigation bar, the "Object Manager" tab is selected, and the "Item" object is chosen. The left sidebar contains a list of setup categories, with "Page Layouts" highlighted. The main content area displays the "Page Layouts" section for the "Item" object, showing 3 items sorted by Page Layout Name. A table lists the page layouts with columns for Page Layout Name, Created By, and Modified By. Each row includes a dropdown arrow for actions.

SETUP > OBJECT MANAGER  
**Item**

Details  
Fields & Relationships  
**Page Layouts**  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout

**Page Layouts**  
3 Items, Sorted by Page Layout Name

Quick Find New Page Layout Assignment

| PAGE LAYOUT NAME       | CREATED BY                       | MODIFIED BY                    |   |
|------------------------|----------------------------------|--------------------------------|---|
| Item Layout            | Jayasurya G, 8/24/2025, 11:23 PM | Jayasurya G, 9/1/2025, 7:10 PM | ▼ |
| Page Layout for Gold   | Jayasurya G, 9/1/2025, 11:06 AM  | Jayasurya G, 9/1/2025, 7:10 PM | ▼ |
| Page Layout for Silver | Jayasurya G, 9/1/2025, 6:31 PM   | Jayasurya G, 9/1/2025, 7:10 PM | ▼ |



# ● Create A Record Types

The screenshot shows the Salesforce Lightning Setup interface. The browser address bar displays the URL: `orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001id0H/RecordTypes/view`. The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and several utility icons. Below the navigation bar, the "Object Manager" tab is selected, showing a breadcrumb trail: "SETUP > OBJECT MANAGER". The main content area is titled "Item" and displays the "Record Types" section for a specific object. On the left, a sidebar lists various setup options, with "Record Types" currently selected. The main area shows a table of record types with the following data:

| RECORD TYPE LABEL | DESCRIPTION              | ACTIVE | MODIFIED BY                    |
|-------------------|--------------------------|--------|--------------------------------|
| Gold              | Gold items information   | ✓      | Jayasurya G, 9/1/2025, 6:37 PM |
| Silver            | Silver items information | ✓      | Jayasurya G, 9/1/2025, 6:39 PM |

At the top of the table, it indicates "2 Items, Sorted by Record Type Label". Above the table, there are buttons for "New" and "Page Layout Assignment", and a "Quick Find" search box.



# ● Creating Permission Sets

The screenshot shows the Salesforce Lightning Setup interface for Permission Sets. The browser address bar displays the URL: `orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home`. The left sidebar contains navigation options: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets (selected), Custom Code, and Custom Permissions. The main content area is titled "Permission Sets" and includes a search bar, a "New" button, and a table of existing permission sets. The table has columns for Action, Permission Set Name, Description, and License. The "Per to Worker" permission set is highlighted. At the bottom, there is a pagination bar showing "1.7 of 7" and "0 Selected".

orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home

Search Setup

Setup Home Object Manager

Q permis

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

SETUP  
Permission Sets

Help for this Page

Permission Sets

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

All Permission Sets Edit Delete Create New View

New

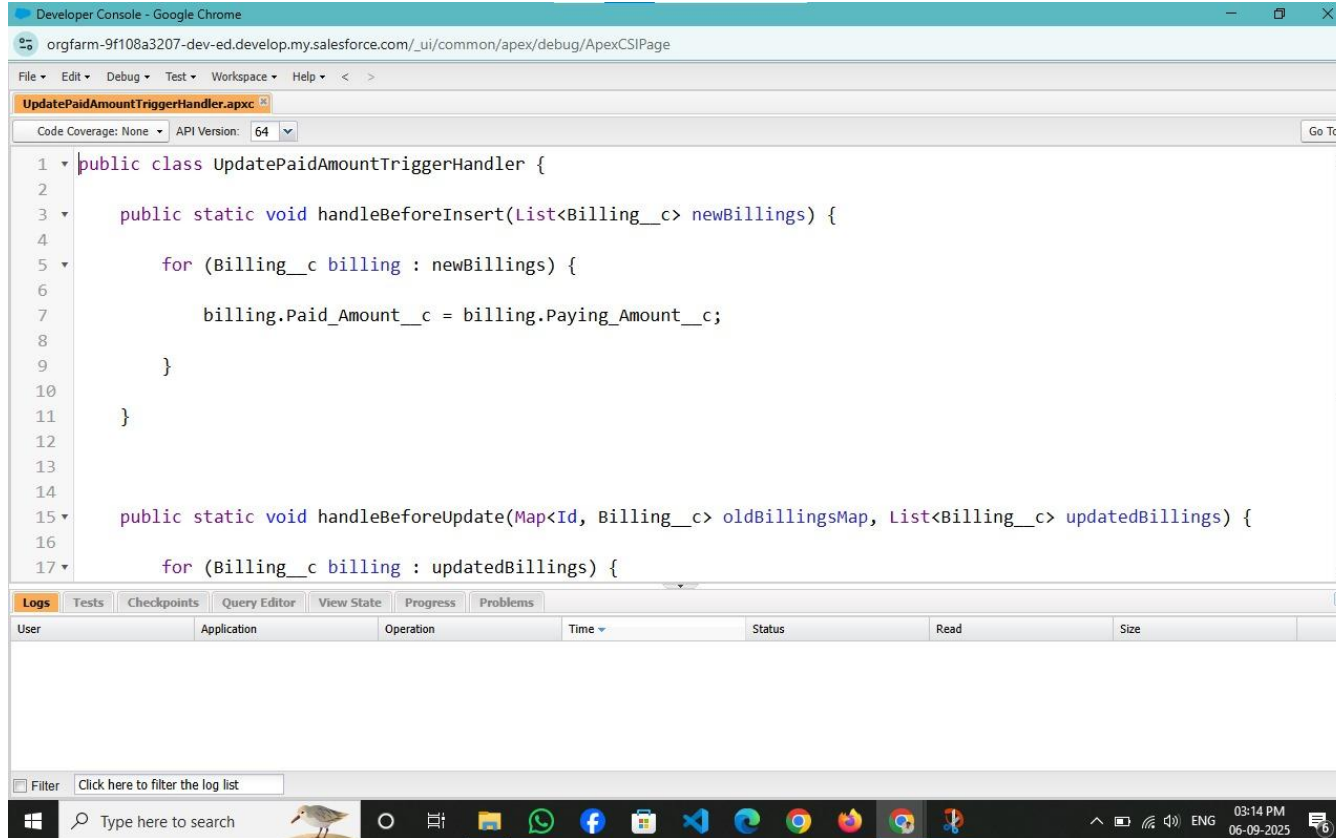
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

| Action      | Permission Set Name                                | Description   | License                      |
|-------------|--|---|------------------------------|
| Clone       | Partner Connect Partner Admin Setup                | Set up Partner Connect from a partner org. Partner Co...  | Salesforce                   |
| Clone       | Payments Administrator                             | Has all the user permissions to gate access to APIs th... | Salesforce Payments Internal |
| Del   Clone | Per to Worker                                      |   |                              |
| Clone       | Prompt Template Manager                            | Manage prompt templates using Prompt Builder and r...     | Einstein Prompt Templates    |
| Clone       | Prompt Template User                               | Run prompt templates using generative AI features.        | Einstein Prompt Templates    |
| Clone       | PromptTemplatePermSet                              |   | Cloud Integration User       |
| Clone       | Publish Suggested for You Nudges: Integration User | Access the Core Adoption Service and tenant orgs, wh...   | Cloud Integration User       |

1.7 of 7 0 Selected

Page 1 of 1

# ● Create a Trigger Handler class



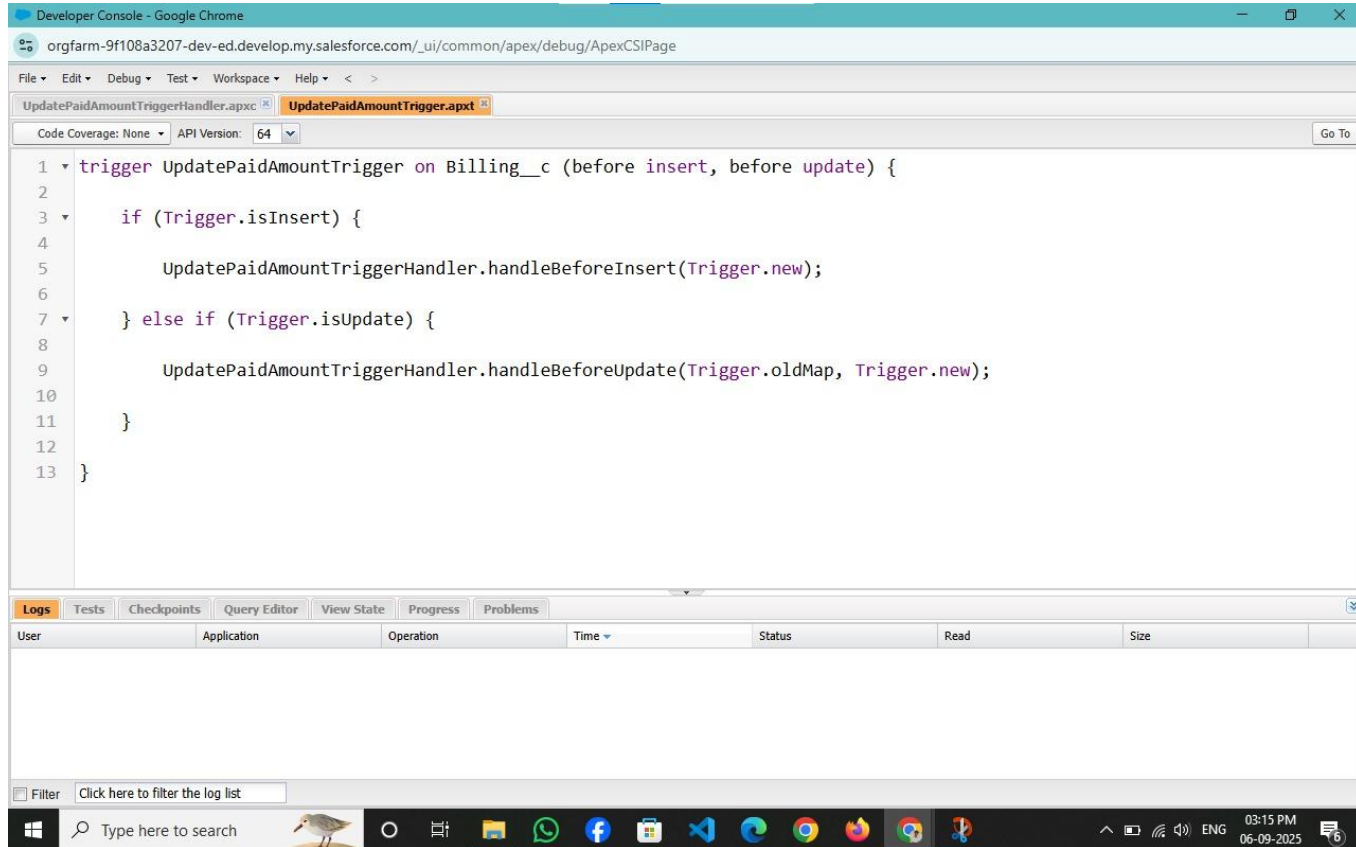
The screenshot displays the Salesforce Developer Console interface. The browser window at the top shows the URL: `orgfarm-9f108a3207-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage`. The editor is open to a file named `UpdatePaidAmountTriggerHandler.apxc`. The code defines a public class `UpdatePaidAmountTriggerHandler` with two static methods: `handleBeforeInsert` and `handleBeforeUpdate`. The `handleBeforeInsert` method iterates over a list of `Billing__c` objects and sets `Paid_Amount__c` to `Paying_Amount__c`. The `handleBeforeUpdate` method iterates over a list of `Billing__c` objects. Below the code editor, the 'Logs' tab is selected, showing a table with columns: User, Application, Operation, Time, Status, Read, and Size. The table is currently empty. At the bottom of the console, there is a search bar with the text 'Type here to search' and a system tray with various icons and the date/time '03:14 PM 06-09-2025'.

```
1 public class UpdatePaidAmountTriggerHandler {
2
3     public static void handleBeforeInsert(List<Billing__c> newBillings) {
4
5         for (Billing__c billing : newBillings) {
6
7             billing.Paid_Amount__c = billing.Paying_Amount__c;
8
9         }
10    }
11
12
13
14
15    public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap, List<Billing__c> updatedBillings) {
16
17        for (Billing__c billing : updatedBillings) {
```

| User | Application | Operation | Time | Status | Read | Size |
|------|-------------|-----------|------|--------|------|------|
|------|-------------|-----------|------|--------|------|------|

Filter Click here to filter the log list

# ● Create the trigger



The screenshot shows the Salesforce Developer Console in Google Chrome. The browser address bar displays the URL: `orgfarm-9f108a3207-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage`. The console's menu bar includes File, Edit, Debug, Test, Workspace, and Help. Two tabs are open: `UpdatePaidAmountTriggerHandler.apxc` and `UpdatePaidAmountTrigger.apxt`. The `UpdatePaidAmountTrigger.apxt` tab is active, showing the following Apex code:

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

Below the code editor, the 'Logs' tab is selected, displaying a table with the following columns: User, Application, Operation, Time, Status, Read, and Size. The table is currently empty. At the bottom of the console, there is a 'Filter' button and a link 'Click here to filter the log list'. The Windows taskbar at the very bottom shows the search bar, system icons, and the date/time '03:15 PM 06-09-2025'.

# ● Create a Record (Jewel Customer)

orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/o/Customer\_name\_\_c/list?filterName=\_\_Recent

Jewellery Inventory ... Items CustomerOrders Prices Billings Reports Dashboards Jewel Customers

Jewel Customers  
Recently Viewed

10 items • Updated a few seconds ago

Search this list...

|    | <input type="checkbox"/> Customer name |   |
|----|--|---|
| 1  | <input type="checkbox"/> madhan        | ▼ |
| 2  | <input type="checkbox"/> ajay          | ▼ |
| 3  | <input type="checkbox"/> elango        | ▼ |
| 4  | <input type="checkbox"/> drago         | ▼ |
| 5  | <input type="checkbox"/> maruthu       | ▼ |
| 6  | <input type="checkbox"/> kamal         | ▼ |
| 7  | <input type="checkbox"/> venkat        | ▼ |
| 8  | <input type="checkbox"/> jaya          | ▼ |
| 9  | <input type="checkbox"/> surya         | ▼ |
| 10 | <input type="checkbox"/> தமிழன்டா sk   | ▼ |

Type here to search

03:18 PM  
06-09-2025

# ● View a Record(Jewel Customer)

The screenshot displays a Salesforce Lightning interface for 'Jewel Customers'. The browser address bar shows the URL: `orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/o/Customer_name__c/list?filterName=__Recent`. The page header includes a search bar and navigation tabs for 'Jewellery Inventory ...', 'Items', 'CustomerOrders', 'Prices', 'Billings', 'Reports', 'Dashboards', and 'Jewel Customers'. The 'Jewel Customers' tab is active, showing a 'Recently Viewed' filter and a table with 10 items. The table columns are 'Customer name' and 'Assign Label'. The records listed are:

|    | Customer name               | Assign Label |
|----|-----------------------------|--------------|
| 1  | <a href="#">madhan</a>      |              |
| 2  | <a href="#">ajay</a>        |              |
| 3  | <a href="#">elango</a>      |              |
| 4  | <a href="#">drago</a>       |              |
| 5  | <a href="#">maruthu</a>     |              |
| 6  | <a href="#">kamal</a>       |              |
| 7  | <a href="#">venkat</a>      |              |
| 8  | <a href="#">jaya</a>        |              |
| 9  | <a href="#">surya</a>       |              |
| 10 | <a href="#">தமிழன்டா sk</a> |              |

A context menu is open over the table, showing the following options:

- + New Jewel Customer
- Recent records
  - [madhan](#)
  - [ajay](#)
  - [elango](#)
  - [drago](#)
  - [maruthu](#)
- + Open "Recently Viewed | J..." in New Tab

# ● Create a Record (Price)

orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/o/Price\_\_c/list?filterName=\_\_Recent

Jewellery Inventory ... Items CustomerOrders Prices Billings Reports Dashboards Jewel Customers

Prices  
Recently Viewed

10 items • Updated a few seconds ago

New Import Change Owner Assign Label

Search this list...

|    | <input type="checkbox"/> Price id |  |
|----|-----------------------------------|--|
| 1  | <input type="checkbox"/> Price-10 |  |
| 2  | <input type="checkbox"/> Price-09 |  |
| 3  | <input type="checkbox"/> Price-08 |  |
| 4  | <input type="checkbox"/> Price-07 |  |
| 5  | <input type="checkbox"/> Price-06 |  |
| 6  | <input type="checkbox"/> Price-05 |  |
| 7  | <input type="checkbox"/> Price-04 |  |
| 8  | <input type="checkbox"/> Price-03 |  |
| 9  | <input type="checkbox"/> Price-02 |  |
| 10 | <input type="checkbox"/> Price-01 |  |

https://orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/o/Price\_\_c/home

- Create a Record (Customer Order)

The screenshot displays a Salesforce Lightning interface for a custom object named 'CustomerOrders'. The browser address bar shows the URL: `orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/o/CustomerOrder_c/list?filterName=__Recent`. The navigation bar includes a search bar and a menu with options: Jewellery Inventory, Items, CustomerOrders (selected), Prices, Billings, Reports, Dashboards, and Jewel Customers. The main content area is titled 'CustomerOrders' and 'Recently Viewed'. It shows a list of 10 items, updated a few seconds ago. The list is filtered by 'Recently Viewed' and includes a search bar 'Search this list...'. The list table has columns for 'CustomerOrder id' and a dropdown menu. The list contains 10 items, each with a checkbox and a dropdown menu.

|    | <input type="checkbox"/> CustomerOrder id |   |
|----|---|---|
| 1  | <input type="checkbox"/> CustomerOrder-10 | ▼ |
| 2  | <input type="checkbox"/> CustomerOrder-09 | ▼ |
| 3  | <input type="checkbox"/> CustomerOrder-08 | ▼ |
| 4  | <input type="checkbox"/> CustomerOrder-07 | ▼ |
| 5  | <input type="checkbox"/> CustomerOrder-06 | ▼ |
| 6  | <input type="checkbox"/> CustomerOrder-05 | ▼ |
| 7  | <input type="checkbox"/> CustomerOrder-04 | ▼ |
| 8  | <input type="checkbox"/> CustomerOrder-03 | ▼ |
| 9  | <input type="checkbox"/> CustomerOrder-02 | ▼ |
| 10 | <input type="checkbox"/> CustomerOrder-01 | ▼ |

[https://orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/o/CustomerOrder\\_c/home](https://orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/o/CustomerOrder_c/home)

# ● Create a Record (Billing)

orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/o/Billing\_\_c/list?filterName=\_\_Recent

Jewellery Inventory ... Items CustomerOrders Prices Billings Reports Dashboards Jewel Customers

Billings Recently Viewed 10 items • Updated a few seconds ago

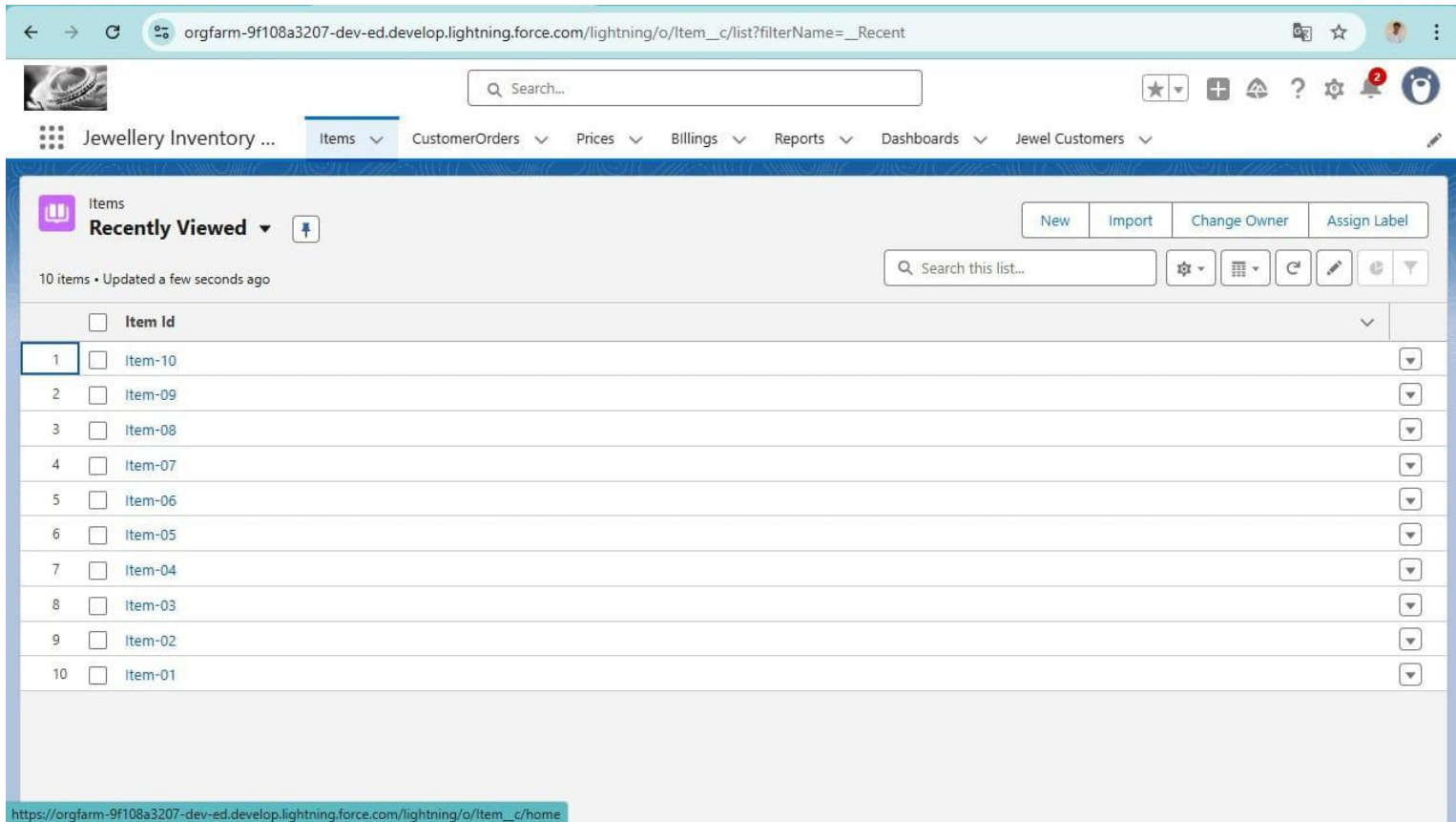
New Import Change Owner Assign Label

Search this list...

|    | <input type="checkbox"/> Billing id |   |
|----|-------------------------------------|---|
| 1  | <input type="checkbox"/> Billing-11 | ▼ |
| 2  | <input type="checkbox"/> Billing-10 | ▼ |
| 3  | <input type="checkbox"/> Billing-09 | ▼ |
| 4  | <input type="checkbox"/> Billing-08 | ▼ |
| 5  | <input type="checkbox"/> Billing-07 | ▼ |
| 6  | <input type="checkbox"/> Billing-06 | ▼ |
| 7  | <input type="checkbox"/> Billing-05 | ▼ |
| 8  | <input type="checkbox"/> Billing-04 | ▼ |
| 9  | <input type="checkbox"/> Billing-03 | ▼ |
| 10 | <input type="checkbox"/> Billing-01 | ▼ |



# ● Create a Record (Item)



The screenshot displays a Salesforce Lightning interface for a 'Jewellery Inventory' system. The browser address bar shows the URL: `orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/o/Item_c/list?filterName=__Recent`. The page features a navigation bar with tabs for 'Items', 'CustomerOrders', 'Prices', 'Billings', 'Reports', 'Dashboards', and 'Jewel Customers'. The 'Items' tab is active, showing a 'Recently Viewed' section with a list of 10 items. The first item, 'Item-10', is highlighted. The interface includes a search bar, a 'New' button, and an 'Import' button. The table of items is as follows:

|    | <input type="checkbox"/> Item Id |   |
|----|----------------------------------|---|
| 1  | <input type="checkbox"/> Item-10 | ▼ |
| 2  | <input type="checkbox"/> Item-09 | ▼ |
| 3  | <input type="checkbox"/> Item-08 | ▼ |
| 4  | <input type="checkbox"/> Item-07 | ▼ |
| 5  | <input type="checkbox"/> Item-06 | ▼ |
| 6  | <input type="checkbox"/> Item-05 | ▼ |
| 7  | <input type="checkbox"/> Item-04 | ▼ |
| 8  | <input type="checkbox"/> Item-03 | ▼ |
| 9  | <input type="checkbox"/> Item-02 | ▼ |
| 10 | <input type="checkbox"/> Item-01 | ▼ |

The URL at the bottom of the page is: `https://orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/o/Item_c/home`

# ● Create a Reports

orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

Jewellery Inventory ... Items CustomerOrders Prices Billings Reports Dashboards Jewel Customers

Reports

Recent

4 items

Search recent reports...

New Report New Folder

| REPORTS         | Report Name                | Description | Folder          | Created By  | Created On         | Subscribed |
|-----------------|----------------------------|-------------|-----------------|-------------|--------------------|------------|
| Recent          | New Jewel Customers Report |             | Private Reports | Jayasurya G | 9/5/2025, 10:10 AM |            |
| Created by Me   | New Billings Report        |             | Private Reports | Jayasurya G | 9/5/2025, 10:09 AM |            |
| Private Reports | New Items Report           |             | Private Reports | Jayasurya G | 9/5/2025, 10:08 AM |            |
| Public Reports  | Price Report               |             | Private Reports | Jayasurya G | 9/1/2025, 8:04 PM  |            |
| All Reports     |                            |             |                 |             |                    |            |
| FOLDERS         |                            |             |                 |             |                    |            |
| All Folders     |                            |             |                 |             |                    |            |
| Created by Me   |                            |             |                 |             |                    |            |
| Shared with Me  |                            |             |                 |             |                    |            |
| FAVORITES       |                            |             |                 |             |                    |            |
| All Favorites   |                            |             |                 |             |                    |            |

https://orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/r/sObject/000G0000004IUY9UAM/view?queryScope=userFolders

# ● Create a Dashboard

The screenshot shows the Salesforce Lightning interface for a user named 'Jewellery Inventory ...'. The top navigation bar includes a search bar and various utility icons. The main content area displays the 'Dashboards' section, specifically the 'Recent' view. A table lists the recent dashboards, with columns for Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. The table shows two dashboards: 'Jayasurya' (Enablement Dashboard Spring '24) and 'Jayasurya' (Private Dashboards). The left sidebar contains navigation links for Dashboards, Folders, and Favorites.

orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru

Search...

Jewellery Inventory ... Items CustomerOrders Prices Billings Reports Dashboards Jewel Customers

Dashboards

Recent

2 items

Search recent dashboards...

New Dashboard New Folder

| DASHBOARDS         | Dashboard Name | Description                     | Folder      | Created By         | Created On | Subscribed |
|--------------------|----------------|---------------------------------|-------------|--------------------|------------|------------|
| Recent             | Jayasurya      | Enablement Dashboard Spring '24 | Jayasurya G | 9/5/2025, 10:00 AM |            |            |
| Created by Me      | Jayasurya      | Private Dashboards              | Jayasurya G | 9/5/2025, 10:01 AM |            |            |
| Private Dashboards |                |                                 |             |                    |            |            |
| All Dashboards     |                |                                 |             |                    |            |            |
| FOLDERS            |                |                                 |             |                    |            |            |
| All Folders        |                |                                 |             |                    |            |            |
| Created by Me      |                |                                 |             |                    |            |            |
| Shared with Me     |                |                                 |             |                    |            |            |
| FAVORITES          |                |                                 |             |                    |            |            |
| All Favorites      |                |                                 |             |                    |            |            |

https://orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/r/sObject/01ZgL000003dLxJUAU/view?queryScope=userFolders

# ● Create a Flow

The screenshot shows the Salesforce Lightning Setup interface. The browser address bar displays the URL: `orgfarm-9f108a3207-dev-ed.develop.lightning.force.com/lightning/setup/Flows/home`. The top navigation bar includes a search bar labeled "Search Setup" and a "Setup" tab. The left sidebar shows a navigation menu with "Process Automation" expanded, highlighting "Flows". Below this, "Identity" is also expanded, showing "Login Flows". A message states: "Didn't find what you're looking for? Try using Global Search."

The main content area displays "Flow Definitions" with a sub-header "All Flows". It indicates "50+ items" and shows sorting and filtering options. A table lists various flows, with "Billing" highlighted. The table columns are: Flow Label, Process Type, A..., Te..., Package State, P..., Last ..., and Last Modifie....

| Flow Label ↑                     | Process Type                     | A...                                | Te...                               | Package State     | P...        | Last ...           | Last Modifie... |
|----------------------------------|----------------------------------|-------------------------------------|-------------------------------------|-------------------|-------------|--------------------|-----------------|
| Add or Modify Service Appoin...  | Salesforce Scheduler Flow        | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Managed-Installed |             |                    |                 |
| Approvals Workflow: Evaluate ... | Screen Flow                      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |             |                    |                 |
| Approvals Workflow: Process ...  | Screen Flow                      | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Managed-Installed |             |                    |                 |
| Authentication Provider User ... | Identity User Registration Fl... | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Managed-Installed |             |                    |                 |
| Basic Approval Request           | Flow Orchestration for CMS       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |             |                    |                 |
| <b>Billing</b>                   | Autolaunched Flow                | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Unmanaged         | Jayasurya G | 9/2/2025, 10:17 PM |                 |
| Book Appointment from Invita...  | Salesforce Scheduler Flow        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |             |                    |                 |
| Cancel Item Flow                 | Screen Flow                      | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Managed-Installed |             |                    |                 |
| Change Case Owner to Incide...   | Screen Flow                      | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Managed-Installed |             |                    |                 |
| Chats Routed to Agents and ...   | Omni-Channel Flow                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |             |                    |                 |

At the bottom left, there is a small code snippet: `javascript:void(0);`

# ● CONCLUSION

- The CRM Application for Jewel Management successfully streamlines customer relationship handling, inventory tracking, and sales management for jewelry businesses. By integrating customer data, purchase history, and product catalog into a single system, the application enhances customer engagement and loyalty. It also reduces manual workload by automating billing, reminders, and follow-ups, thereby improving business efficiency.
- From a developer's perspective, the project demonstrates the practical use of CRM concepts in the jewelry domain, combining database management, user-friendly interfaces, and secure transaction handling. Overall, the system provides a reliable, scalable, and efficient solution for jewel management, ensuring long-term growth and customer satisfaction.

THANK YOU!