

# **CRM APPLICATION FOR JEWEL MANAGEMENT-(DEVELOPER)**

College Name : Government Arts And Science College,Modakkurichi

College Code :BRUAB

**TEAM ID: NM2025TMID26336**

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## **1.INTRODUCTION**

### **1.1 Project Overview**

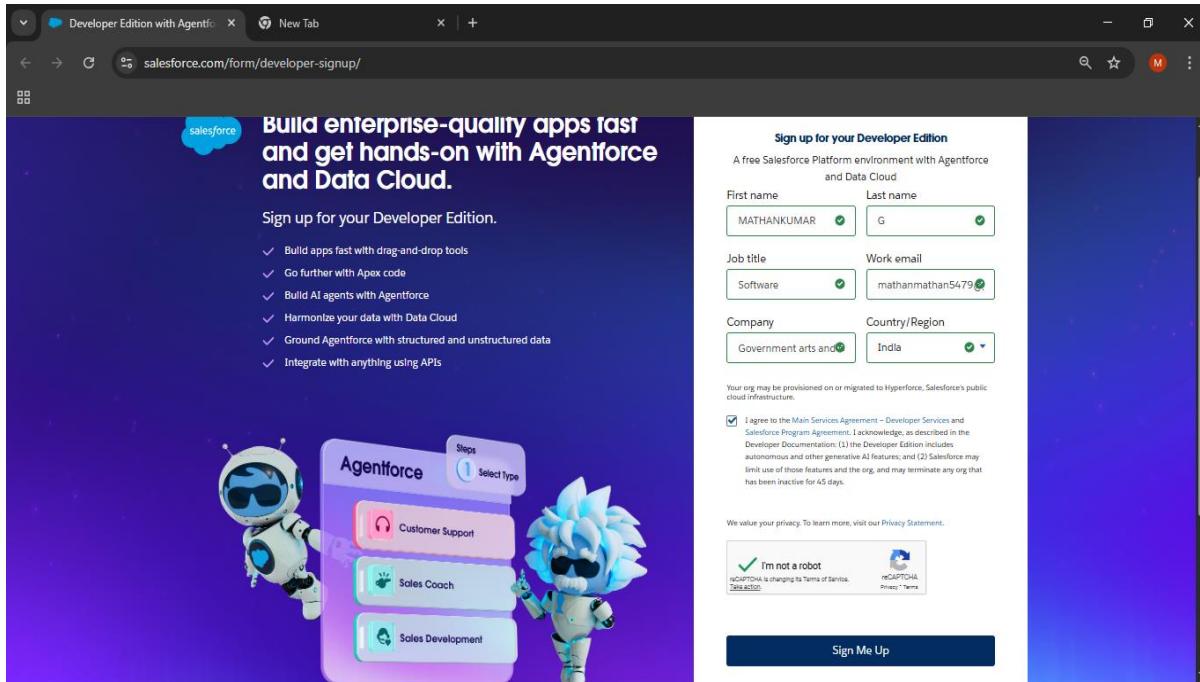
The jewelry industry requires precise management of customer relationships, inventory, sales, and after-sales services to remain competitive. Traditional

methods, such as manual records or standalone software, often lead to inefficiencies, lack of data visibility, and poor customer engagement. To address these challenges, a Salesforce-based CRM application for Jewel Management provides a modern, cloud-enabled, and intelligent solution tailored specifically to the jewel management.

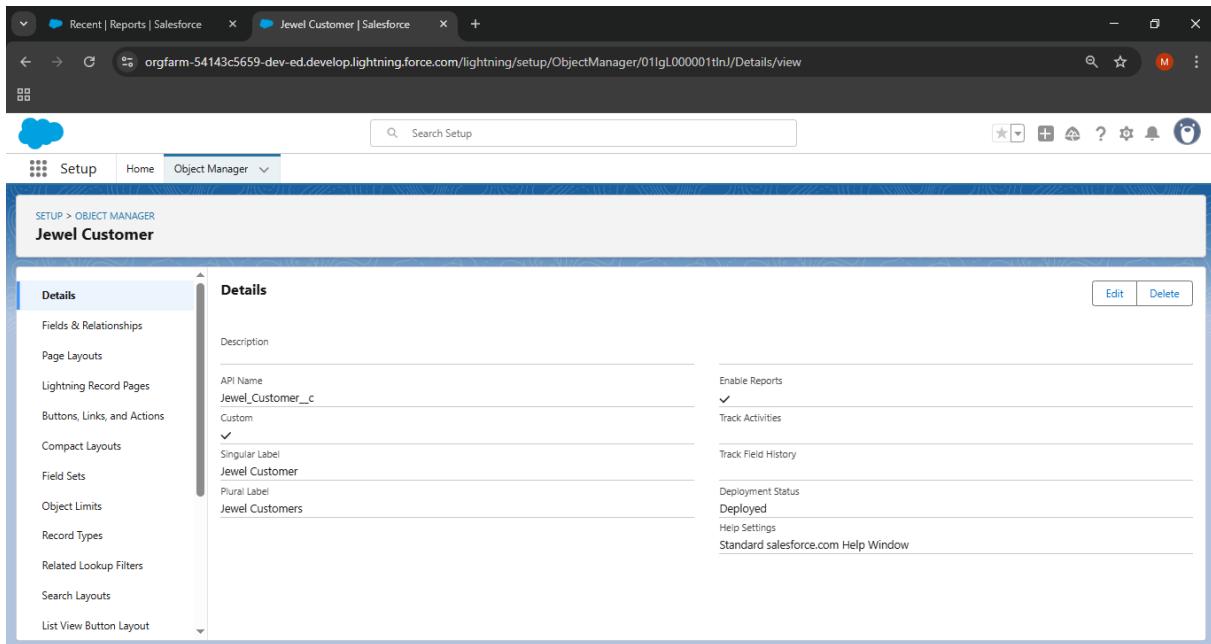
## DEVELOPMENT PHASE

### Creating Developer Account:

By using this URL - <https://www.salesforce.com/form/developer-signup/?d=pb>



# Create Objects:Jewel Customer, Customer Order, Item,Price,Billing.



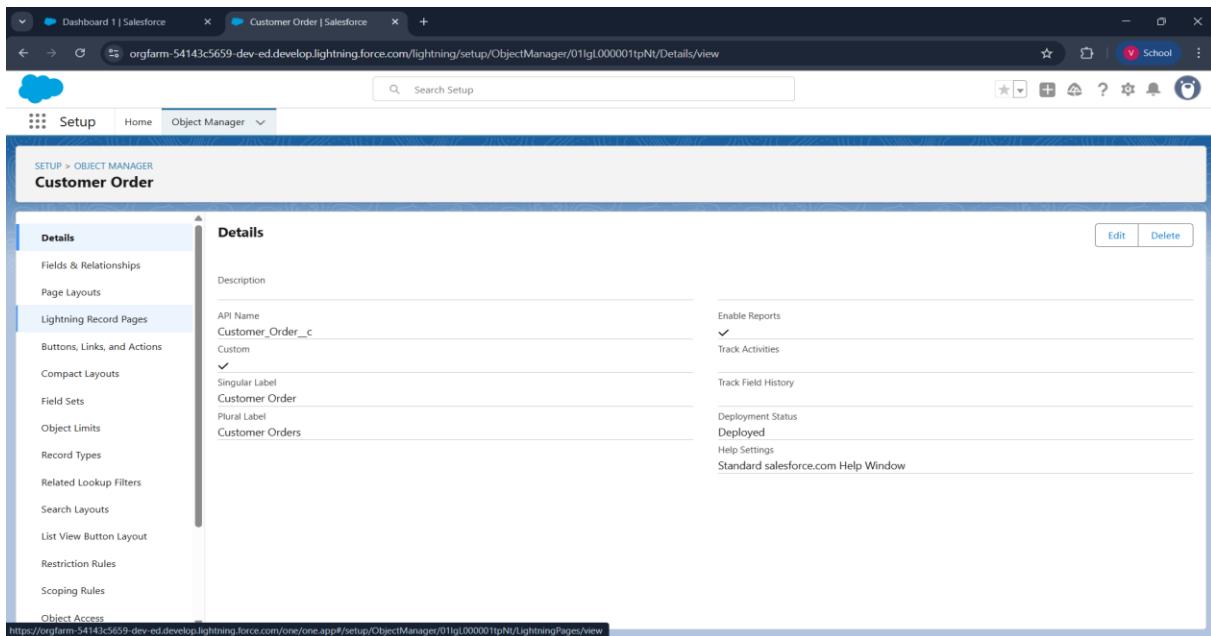
The screenshot shows the Salesforce Object Manager interface for creating a new object named "Jewel Customer".

**Object Details:**

- Description:** (Text input field)
- API Name:** `Jewel_Customer__c`
- Custom:**
- Singular Label:** `Jewel Customer`
- Plural Label:** `Jewel Customers`
- Enable Reports:**
- Track Activities:**
- Track Field History:**
- Deployment Status:** `Deployed`
- Help Settings:** Standard salesforce.com Help Window

**Object Manager Sidebar:**

- 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



The screenshot shows the Salesforce Object Manager interface for creating a new object named "Customer Order".

**Object Details:**

- Description:** (Text input field)
- API Name:** `Customer_Order__c`
- Custom:**
- Singular Label:** `Customer Order`
- Plural Label:** `Customer Orders`
- Enable Reports:**
- Track Activities:**
- Track Field History:**
- Deployment Status:** `Deployed`
- Help Settings:** Standard salesforce.com Help Window

**Object Manager Sidebar:**

- 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

Dashboard 1 | Salesforce Item | Salesforce

orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001tiOv/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Item

Details

Description

API Name: Item\_c  
Custom: ✓  
Singular Label: Item  
Plural Label: Items

Enable Reports: ✓  
Track Activities  
Track Field History  
Deployment Status: Deployed  
Help Settings: Standard salesforce.com Help Window

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

Edit Delete

Item

Dashboard 1 | Salesforce Price | Salesforce

orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001tqBt/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Price

Details

Description

API Name: Price\_c  
Custom: ✓  
Singular Label: Price  
Plural Label: Prices

Enable Reports: ✓  
Track Activities  
Track Field History  
Deployment Status: Deployed  
Help Settings: Standard salesforce.com Help Window

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

Edit Delete

Price

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various configuration options under 'Details'. The main area displays the 'Billing' object's details, including its API name ('Billing\_\_c'), singular label ('Billing'), and plural label ('Billings'). Other settings shown include 'Enable Reports' (unchecked), 'Track Activities' (checked), 'Track Field History' (unchecked), 'Deployment Status' (Deployed), and 'Help Settings'.

## Creating A Tab: Jewel Customer, Customer Order, Item, Price, Billing.

The screenshot shows the Salesforce Custom Tabs interface. The left sidebar has 'User Interface' expanded, with 'Tabs' selected. The main area is titled 'Custom Tabs' and contains a table for 'Custom Object Tabs'. The table lists five tabs: 'Billing' (Car tab style), 'Customer Orders' (Airplane tab style), 'Items' (Books tab style), 'Jewel Customers' (Jewel tab style), and 'Prices' (Postage tab style). Below this is a section for 'Web Tabs', which currently says 'No Web Tabs have been defined'.

Action	Label	Tab Style	Description
Edit   Del	Billing	Car	
Edit   Del	Customer Orders	Airplane	
Edit   Del	Items	Books	
Edit   Del	Jewel Customers	Jewel	
Edit   Del	Prices	Postage	

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The custom tab 'Jewel Customers' is displayed, defined for the 'Jewel Customer' object. The tab has a 'Jewel' style and a splash page custom link. It was created by MATHANKUMAR\_G on 8/31/2025 at 11:34 PM.

**Custom Tab Definition Detail**

Tab Label	Jewel Customers	Edit	Delete
Object	Jewel Customer	Tab Style	
Description		Splash Page Custom Link	Jewel
Created By	MATHANKUMAR_G 8/31/2025, 11:34 PM	Modified By	MATHANKUMAR_G 8/31/2025, 11:34 PM

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The custom tab 'Customer Orders' is displayed, defined for the 'Customer Order' object. The tab has an 'Airplane' style and a splash page custom link. It was created by MATHANKUMAR\_G on 8/31/2025 at 11:43 PM.

**Custom Tab Definition Detail**

Tab Label	Customer Orders	Edit	Delete
Object	Customer Order	Tab Style	
Description		Splash Page Custom Link	Airplane
Created By	MATHANKUMAR_G 8/31/2025, 11:43 PM	Modified By	MATHANKUMAR_G 8/31/2025, 11:43 PM

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar shows 'User Interface' and 'Tabs'. The main content area displays the 'Custom Object Tab Items' details. The tab label is 'Items', the object is 'Item', and the tab style is 'Books'. The tab was created by MATHANKUMAR\_G on 8/31/2025, 11:38 PM, and modified by the same user on 8/31/2025, 11:38 PM.

Tab Label	Object	Tab Style
Items	Item	Books

Created By: MATHANKUMAR\_G, 8/31/2025, 11:38 PM  
Modified By: MATHANKUMAR\_G, 8/31/2025, 11:38 PM

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar shows 'User Interface' and 'Tabs'. The main content area displays the 'Custom Object Tab Prices' details. The tab label is 'Prices', the object is 'Price', and the tab style is 'Postage'. The tab was created by MATHANKUMAR\_G on 8/31/2025, 11:45 PM, and modified by the same user on 8/31/2025, 11:45 PM.

Tab Label	Object	Tab Style
Prices	Price	Postage

Created By: MATHANKUMAR\_G, 8/31/2025, 11:45 PM  
Modified By: MATHANKUMAR\_G, 8/31/2025, 11:45 PM

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01rgL00000F0ZDH%3Fsetupid%3DCustomTabs>. The page title is "Tabs | Salesforce". The left sidebar shows "User Interface" with "Tabs" selected. The main content area displays a "Custom Tab Definition Detail" for a tab named "Billings". The tab is defined for the "Billing" object. It includes fields for Tab Label (Billings), Object (Billing), Description, Created By (MATHANKUMAR\_G, 8/31/2025, 11:47 PM), Modified By (MATHANKUMAR\_G, 8/31/2025, 11:47 PM), Tab Style (Car), and Splash Page Custom Link.

## Create A Lightning App :

The screenshot shows the Lightning App Builder interface with the URL <https://orgfarm-54143c5659-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02ugL000006EuA9QAK&retUrl=https%3A%2F%2Forgfarm-54143c5659-dev-e...>. The page title is "Jewellery Inventory System - Licenses". The left sidebar shows "App Settings" with "App Details & Branding" selected. The main content area displays "App Details & Branding" settings. Under "App Details", the "App Name" is set to "Jewellery Inventory System" and the "Developer Name" is set to "Jewellery\_Inventory\_System". Under "App Branding", there is an "Image" placeholder with a blue diamond icon, a "Primary Color Hex Value" set to "#0070D2", and a "Clear" button. Under "Org Theme Options", there is a checkbox for "Use the app's image and color instead of the org's custom theme". The "App Launcher Preview" section shows a preview card with the app name "Jewellery Inventory System" and the description "Elevate your look with elegance".

The screenshot shows the Lightning App Builder interface. On the left, there's a sidebar with sections like 'App Settings' (App Details & Branding, App Options, Utility Items (Desktop Only)), 'Navigation Items' (Navigation Rules, User Profiles), and 'Available Items' (Accounts, Activation Targets, Activations, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations). The main area is titled 'Navigation Items' with a sub-instruction: 'Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.' It shows a 'Selected Items' list containing 'Jewel Customers', 'Items', 'Customer Orders', 'Prices', 'Billings', 'Reports', and 'Dashboards'. Navigation arrows on the right allow moving items between lists.

## Creating Lookup Relationship:

The screenshot shows the Salesforce Setup interface under 'Object Manager'. A sidebar on the left lists options like 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 area is titled 'Customer Order' and shows the 'Customer' custom field definition. The 'Field & Relationships' tab is selected. The 'Custom Field Definition Detail' section includes fields for 'Field Label' (Customer), 'Field Name' (Customer), 'API Name' (Customer\_\_c), 'Description' (Help Text), 'Data Owner' (Field Usage), 'Data Sensitivity Level' (Compliance Categorization), 'Created By' (MATHANKUMAR\_G, 9/3/2025, 10:24 PM), 'Modified By' (MATHANKUMAR\_G, 9/3/2025, 10:24 PM), and 'Validation Rules'. The 'Lookup Options' section shows 'Related To' (Jewel Customer), 'Related List Label' (Customer Orders), and 'Required' (unchecked). A note at the bottom says 'What to do if the lookup record is deleted? Clear the value of this field.'

## Creating a Master-Detail Relationship:

The screenshot shows the Salesforce Object Manager interface for creating a custom field named 'Item'. The 'Fields & Relationships' tab is selected. In the 'Field Information' section, the 'Field Label' is 'Item', 'Field Name' is 'Item', 'API Name' is 'Item\_\_c', and 'Object Name' is 'Customer Order'. The 'Data Type' is 'Master-Detail'. Under 'Master-Detail Options', the 'Related To' field is set to 'Item' and the 'Child Relationship Name' is 'Customer\_Orders'. The 'Sharing Setting' is 'ReadWrite: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.' The 'Modified By' field shows the user 'MATHANKUMAR\_G' with the timestamp '9/3/2025, 10:27 PM'.

## Creating Text Field In Jewel Customer Object:

The screenshot shows the Salesforce Object Manager interface for creating a custom field named 'City' on the 'Jewel Customer' object. The 'Fields & Relationships' tab is selected. In the 'Field Information' section, the 'Field Label' is 'City', 'Field Name' is 'City', 'API Name' is 'City\_\_c', and 'Object Name' is 'Jewel Customer'. The 'Data Type' is 'Text'. Under 'General Options', the 'Required' checkbox is checked. The 'Modified By' field shows the user 'MATHANKUMAR\_G' with the timestamp '10/2/2025, 3:30 AM'.

## Creating the Phone field in object Jewel Customer:

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays the 'Jewel Customer Custom Field' for the 'Phone' field. The 'Field Information' section shows the field label as 'Phone', field name as 'Phone', API name as 'Phone\_\_c', and data type as 'Phone'. The 'Object Name' is 'Jewel Customer'. The 'Custom Field Definition Detail' section includes tabs for Edit, Set Field-Level Security, View Field Accessibility, and Where is this used?. The 'General Options' section shows 'Required' checked. The 'Validation Rules' tab is visible at the bottom.

## Creating The Email Field In Object Jewel Customer:

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays the 'Jewel Customer Custom Field' for the 'Email' field. The 'Field Information' section shows the field label as 'Email', field name as 'Email', API name as 'Email\_\_c', and data type as 'Email'. The 'Object Name' is 'Jewel Customer'. The 'Custom Field Definition Detail' section includes tabs for Edit, Set Field-Level Security, View Field Accessibility, and Where is this used?. The 'General Options' section shows 'Required' checked. The 'Validation Rules' tab is visible at the bottom.

## Creating The Number Field In Item Object:

The screenshot shows the Salesforce Setup interface for creating a custom field. The URL is <https://orgfarm-54143c5659-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL000001tiOv/FieldsAndRelationships/00NgL00001VjXiD/view>. The page title is "Item | Salesforce". The left sidebar shows "Object Manager" selected under "Setup > OBJECT MANAGER". The main content area is titled "Item Custom Field Purity" and "Back to Item". The "Custom Field Definition Detail" section includes tabs for "Edit", "Set Field-Level Security", "View Field Accessibility", and "Where is this used?". Under "Field Information", the field is defined as follows:

Field Label	Purity	Object Name	Item
Field Name	Purity	Data Type	Number
API Name	Purity__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Under "General Options", the "Required" checkbox is checked. Other options like "Unique", "External ID", and "AI Prediction" are available but unchecked.

## Creating Picklist Field In Item Object:

The screenshot shows the Salesforce Setup interface for creating a custom field. The URL is <https://orgfarm-54143c5659-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL000001tiOv/FieldsAndRelationships/00NgL00001Vk6Pp/view>. The page title is "Item | Salesforce". The left sidebar shows "Object Manager" selected under "Setup > OBJECT MANAGER". The main content area is titled "Item Custom Field Item Type" and "Back to Item". The "Custom Field Definition Detail" section includes tabs for "Edit", "Set Field-Level Security", "View Field Accessibility", and "Where is this used?". Under "Field Information", the field is defined as follows:

Field Label	Item Type	Object Name	Item
Field Name	Item_Type	Data Type	Picklist
API Name	Item_Type__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Under "General Options", the "Required" checkbox is checked. A "Default Value" dropdown is also present. Under "Picklist Options", there is a list of items: "Electronics", "Clothing", "Books", "Groceries", and "Services".

## Creating Currency Field In Price Object:

The screenshot shows the Salesforce Setup interface for creating a custom field. The URL is <https://orgfarm-54143c5659-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL000001tqBt/FieldsAndRelationships/00NgL00001VjJUM/view>. The page title is "Price | Salesforce". The main content area displays the "Custom Field Definition Detail" for a field named "Gold Price". The "Field Information" section shows the following details:

- Field Label: Gold Price
- Field Name: Gold\_Price
- API Name: Gold\_Price\_c
- Description: Help Text
- Data Owner: Field Usage
- Data Sensitivity Level: Standard
- Compliance Categorization: Not Specified
- Created By: MATHANKUMAR\_G, 9/3/2025, 10:48 PM
- Modified By: MATHANKUMAR\_G, 9/3/2025, 10:48 PM

The "General Options" section indicates that the field is Required. The "Object Name" is listed as "Price" and the "Data Type" is "Currency". The sidebar on the left lists various setup options like Page Layouts, Lightning Record Pages, Buttons, etc., under the "Fields & Relationships" category.

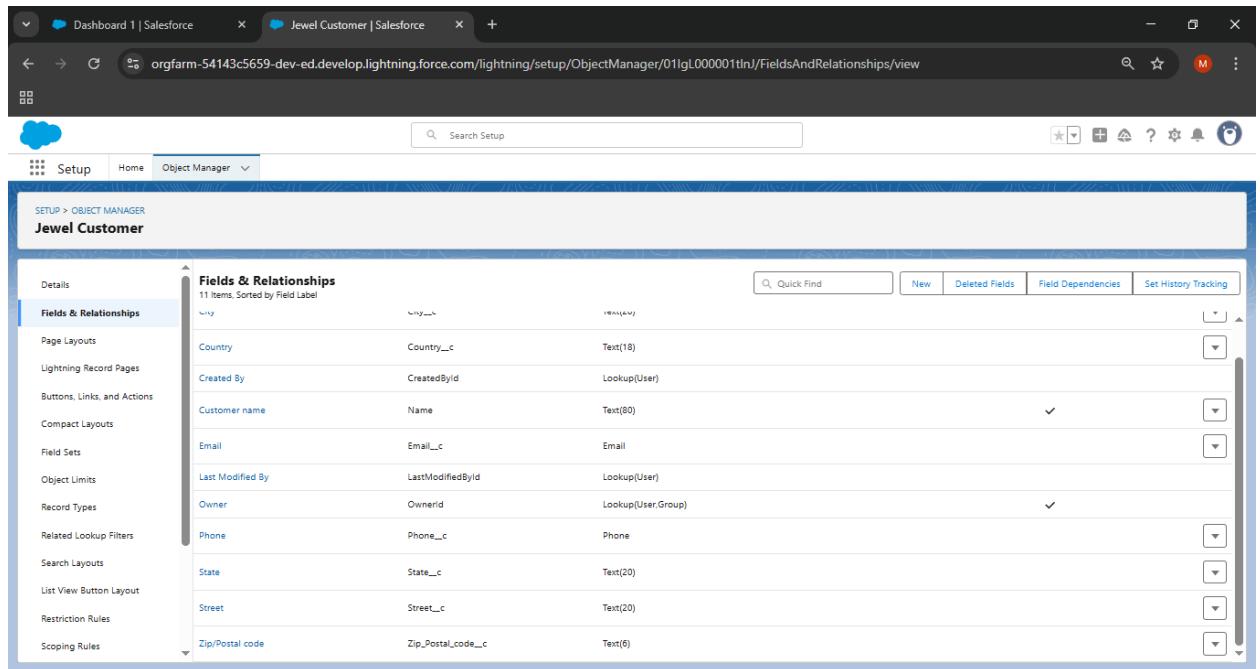
## Creating Formula Field(Cross Object) In Item Object:

The screenshot shows the Salesforce Setup interface for creating a custom formula field. The URL is <https://orgfarm-54143c5659-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL000001tiOv/FieldsAndRelationships/00NgL00001VhEp7/view>. The page title is "Item | Salesforce". The main content area displays the "Custom Field Definition Detail" for a field named "Gold Price". The "Field Information" section shows the following details:

- Field Label: Gold Price
- Field Name: Gold\_Price
- API Name: Gold\_Price\_c
- Description: Help Text
- Data Owner: Field Usage
- Data Sensitivity Level: Standard
- Compliance Categorization: Not Specified
- Created By: MATHANKUMAR\_G, 9/3/2025, 10:59 PM
- Modified By: MATHANKUMAR\_G, 9/3/2025, 10:59 PM

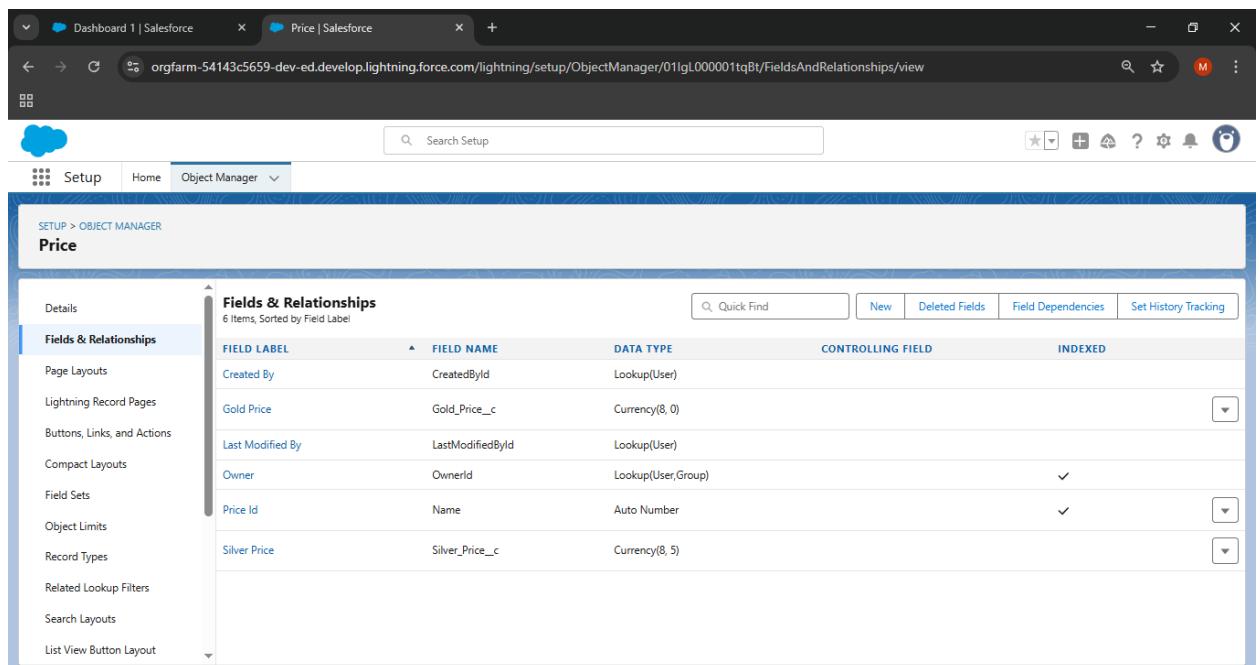
The "Formula Options" section specifies the Data Type as "Formula" and the Decimal Places as "2". The "Object Name" is listed as "Item". The sidebar on the left lists various setup options like Page Layouts, Lightning Record Pages, Buttons, etc., under the "Fields & Relationships" category.

# Creating Remaining Fields in Objects:



The screenshot shows the Salesforce Object Manager interface for the 'Jewel Customer' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area displays a table titled 'Fields & Relationships' with 11 items. The columns show Field Label, Field Name, Data Type, and Controlling Field. Fields listed include Country, Created By, Customer name, Email, Last Modified By, Owner, Phone, State, Street, and Zip/Postal code.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Country	Country__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Customer name	Name	Text(80)		✓
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
State	State__c	Text(20)		
Street	Street__c	Text(20)		
Zip/Postal code	Zip_Postal_code__c	Text(6)		



The screenshot shows the Salesforce Object Manager interface for the 'Price' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area displays a table titled 'Fields & Relationships' with 6 items. The columns show Field Label, Field Name, Data Type, Controlling Field, and Indexed status. Fields listed include Created By, Gold Price, Last Modified By, Owner, Price Id, and Silver Price.

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)		

Dashboard 1 | Salesforce   Item | Salesforce

orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001tiOv/FieldsAndRelationships/view

Setup Home Object Manager

Item

SETUP > OBJECT MANAGER

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 23 items. Sorted by Field Label

Customer Name	Customer_Name__c	Lookup(Jewel Customer)	✓
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)	▼
Owner	OwnerId	Lookup(User/Group)	✓

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Dashboard 1 | Salesforce   Item | Salesforce

orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001tiOv/FieldsAndRelationships/view

Setup Home Object Manager

Item

SETUP > OBJECT MANAGER

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 23 items. Sorted by Field Label

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)	▼
Stone/Other Price	Stone_Other_Price__c	Currency(8, 2)	▼
Total Weights	Total_Weights__c	Formula (Number)	▼

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Dashboard 1 | Salesforce    Item | Salesforce

orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001tiOv/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

Item

SETUP > OBJECT MANAGER

Fields & Relationships

23 items, Sorted by Field Label

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)	▼

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Dashboard 1 | Salesforce    Customer Order | Salesforce

orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001tpNt/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

Customer Order

SETUP > OBJECT MANAGER

Fields & Relationships

6 items, Sorted by Field Label

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

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Screenshot of the Salesforce Object Manager Fields & Relationships page for the Billing object.

The page shows 16 items, sorted by Field Label. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

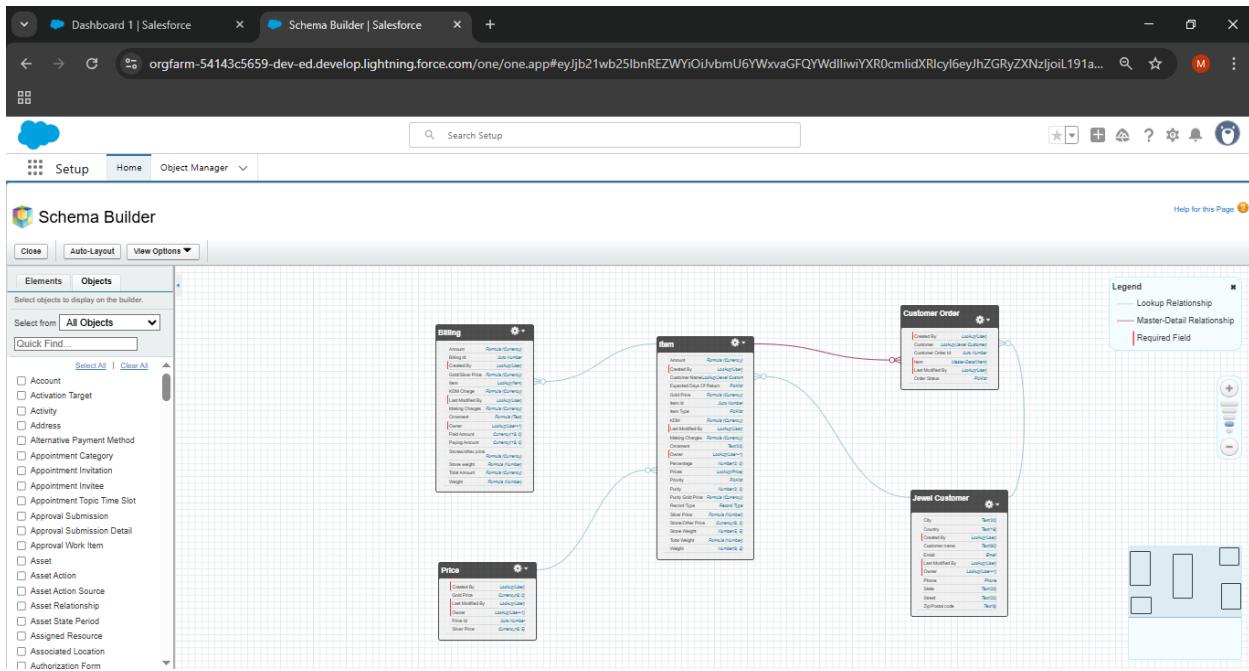
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Billing Id	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Gold/Silver Price	Gold_Silver_Price__c	Formula (Currency)		
Item	Item__c	Lookup(Item)		✓
KDM Charge	KDM_Charge__c	Formula (Currency)		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

Screenshot of the Salesforce Object Manager Fields & Relationships page for the Billing object.

The page shows 16 items, sorted by Field Label. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Making Charges	Making_Charges__c	Formula (Currency)		
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)		

# Schema Builder:



# Creating The Field Dependencies:

The screenshot shows the 'Edit Field Dependency' page in the Salesforce Setup. The left sidebar lists various setup categories like Sales Cloud Everywhere, Administration, and Platform Tools. The main form has a 'Controlling Field' dropdown set to 'Priority' and a 'Dependent Field' dropdown set to 'Expected Days Of Return'. Below these are 'Instructions' and a table for defining dependencies. The table has columns for 'Priority' and 'Expected Days Of Return'. The 'Priority' column has rows for 'Low', 'Medium', 'High', and 'Critical'. The 'Expected Days Of Return' column has rows for '1-2 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', and '8-10 Days'. A legend indicates that yellow cells represent 'Included Value' and white cells represent 'Excluded Value'. Buttons for 'Save', 'Cancel', and 'Preview' are at the top of the form.

## Creating The Validation Rule:

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, and Validation Rules. The main content area is titled 'Validation Rules' and shows two items: 'Postal\_Code' and 'ValidationRule\_For\_JewelCustomerObject'. The 'ValidationRule\_For\_JewelCustomerObject' row has columns: Rule Name (ValidationRule\_For\_JewelCustomerObject), Error Location (Top of Page), Error Message (Please fill Required fields), Active (✓), and Modified By (MATHANKUMAR G, 9/5/2025, 10:35 AM). A 'New' button is visible in the top right corner of the list.

## Create Gold Smith Profile:

The screenshot shows the Salesforce Profiles page. The left sidebar has a search bar and sections for Hyperforce Assistant, Users, Data, Feature Settings, Marketing, Sales, and Products. The 'Profiles' section is selected. The main content area shows a profile named 'Gold Smith' with a 'Profile Detail' table. The table includes fields for Name (Gold Smith), User License (Salesforce), Description, Created By (MATHANKUMAR G, 9/5/2025, 10:44 AM), Modified By (MATHANKUMAR G, 9/6/2025, 9:25 AM), and a 'Custom Profile' checkbox which is checked. Below the table is a 'Page Layouts' section showing standard object layouts for Global, Email Application, Home Page Layout, and Account objects, along with their respective global layouts and view assignment details.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar includes sections for Hyperforce Assistant, Users, Data, Feature Settings, Marketing, Sales, and Products. The main content area displays several tables and settings:

- Data Share Sagemaker Connections**: A grid of checkboxes for various objects.
- Data Share Snowflake Connections**: A grid of checkboxes for various objects.
- Data Share Targets**: A grid of checkboxes for various objects.
- Data Share Target Connection**: A grid of checkboxes for various objects.
- Work Plan Templates**, **Work Step Templates**, **Work Types**, **Work Type Groups**: Grids of checkboxes for various work-related components.
- Custom Object Permissions**: Grids for Billings, Customer Orders, Items, Jewel Customers, and Prices, defining permissions for Read, Create, Edit, Delete, View All Records, Modify All Records, and View All Fields.
- Session Settings**: Set to '2 hours of inactivity'.
- Password Policies**: Set to 'User passwords expire in 90 days'.

## Create Worker Profile:

The screenshot shows the Salesforce Setup interface with the 'Worker' profile creation page. The left sidebar includes sections for Hyperforce Assistant, Users, Data, Feature Settings, Marketing, Sales, and Products. The main content area shows the following details:

**Profile**  
**Worker**

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail

Name	Worker	Edit   Clone   Delete   View Users
User License	Salesforce Platform	Custom Profile <input checked="" type="checkbox"/>
Description		
Created By	MATHANKUMAR_G	9/5/2025, 11:00 AM
Modified By	MATHANKUMAR_G	

Page Layouts

Standard Object Layouts	Global	Lead
Email Application	Not Assigned [View Assignment]	Location Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Location Group Layout [View Assignment]
Account	Account Layout [View Assignment]	Location Group Assignment Layout [View Assignment]

The screenshot shows the Salesforce Setup interface under the Profiles section. On the left, the navigation bar includes links for Home, Object Manager, and a search bar labeled "Search Setup". The main content area displays "Custom Object Permissions" for several objects:

	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Billings	<input type="checkbox"/>						
Customer Orders	<input checked="" type="checkbox"/>						
Items	<input checked="" type="checkbox"/>						

Below the permissions table, there are sections for "Session Settings" and "Password Policies".

## Creating Gold Smith Role:

The screenshot shows the Salesforce Setup interface under the Roles section. On the left, the navigation bar includes links for Home, Object Manager, and a search bar labeled "Search Setup". The main content area displays the "Role Edit" screen for a role named "Gold Smith".

Label	Role Name	This role reports to	Role Name as displayed on reports
Gold Smith	Gold_Smith	CEO	Gold Smith

At the bottom of the screen are "Save", "Save & New", and "Cancel" buttons.

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

The screenshot shows the Salesforce Setup Roles page. In the left sidebar, under 'Users', 'Roles' is selected. The main area displays a 'Role Edit' form for a role named 'Worker'. The 'Label' field contains 'Worker', the 'Role Name' field also contains 'Worker', and the 'This role reports to' field has 'Gold Smith' selected. A note below says 'Role Name as displayed on reports' followed by a text input field. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

The screenshot shows the Salesforce Setup Roles page with the 'Roles' tab selected. The main area displays a 'Creating the Role Hierarchy' section. It shows a tree view of roles under 'Your Organization's Role Hierarchy'. The hierarchy includes 'Government arts and science college modakkurichi' at the top, which branches into 'CEO', 'CFO', 'COO', 'Gold Smith', and 'SVP\_Customer Service & Support'. 'Gold Smith' is expanded, showing it has a child role named 'Worker'. Other nodes like 'Customer Support, International' and 'Customer Support, North America' are also visible. A 'Show in tree view' button is located in the top right of the hierarchy area.

# Create User Niklaus Mikaelson & Kol Mikaelson & 2 More Users:

User  
Niklaus Mikaelson

Name: Niklaus Mikaelson  
Alias: nmika  
Email: mathamathan5479@gmail.com (Verify)  
Username: niklaus5467@gmail.com  
Nickname: Niklaus  
Title:   
Company:   
Department:   
Division:   
Address:   
Time Zone: (GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)

Role: Gold Smith  
User License Profile: Gold Smith  
Active:

Marketing User:   
Offline User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:

User  
Kol Mikaelson

Name: Kol Mikaelson  
Alias: K milk  
Email: mathamathan5479@gmail.com (Verify)  
Username: mikaelson4357@gmail.com  
Nickname: Mikaelson  
Title:   
Company:   
Department:   
Division:   
Address:   
Time Zone: (GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)

Role: Worker  
User License Profile: Salesforce Platform  
Active:

Marketing User:   
Offline User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005gL000007KSDp%3Fnoredirect%3D1%26isUserEntityOverride%3D1>. The page title is "Users | Salesforce". The left sidebar is titled "Setup" and includes sections for User Management Settings, such as "Users" (which is selected), "Feature Settings" (with "Data.com" and "Prospector Users" sub-sections), "Service", and "Embedded Service". The main content area is titled "Users" and shows the "User Detail" page for a user named "Bharath kumar". The user's details include:

Name	Bharath kumar	Role	Worker
Alias	bkuma	User License	Salesforce Platform
Email	<a href="mailto:mathanmathan5479@gmail.com">mathanmathan5479@gmail.com</a> (Verify)	Profile	Worker
Username	bharath6743@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	Bharath	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005gL000007LFsr%3Fnoredirect%3D1%26isUserEntityOverride%3D1>. The page title is "Users | Salesforce". The left sidebar is identical to the first screenshot. The main content area is titled "Users" and shows the "User Detail" page for a user named "Andrew s". The user's details include:

Name	Andrew s	Role	Worker
Alias	as	User License	Salesforce Platform
Email	<a href="mailto:mathanmathan5479@gmail.com">mathanmathan5479@gmail.com</a> (Verify)	Profile	Worker
Username	andrew@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	Andrew	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>

## To Create a Gold Page layout:

The screenshot shows the Salesforce Setup interface for creating a page layout. The left sidebar is titled "SETUP > OBJECT MANAGER" and lists various options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The "Page Layouts" section is selected. The main area shows a "Fields" tab with a table of fields: Customer Name, Item Type, Ornament, Priority, Silver Price, and Weight. Below the table, there's an "Information" section with sample data for a record with ID GEN-200-001234. The "Information" section includes fields like Customer Name (Sample Text), Price (Sample Text), Item Type (Sample Text), Ornament (Sample Text), Gold Price (\$123.45), Weight (0.00451), Priority (45), Percentage (12), Stone Weight (0.21055), Total Weight (44.130), Stone/Other Price (\$123.45), Amount (\$123.45), KDM (\$123.45), and Making Charges (\$123.45). At the bottom, there's a "System Information" section with Last Modified By (Sample Text).

## To Create a Silver Page layout:

The screenshot shows the Salesforce Setup interface for creating a page layout, similar to the previous one but with different field values. The left sidebar and "Page Layouts" selection are the same. The main area shows a "Fields" tab with a table of fields: Customer Name, Item Type, Ornament, Priority, Silver Price, and Weight. Below the table, there's an "Information" section with sample data for a record with ID GEN-200-001234. The "Information" section includes fields like Customer Name (Sample Text), Price (Sample Text), Item Type (Sample Text), Ornament (Sample Text), Silver Price (\$8.707), Weight (0.46938), Stone Weight (0.01437), Stone/Other Price (\$123.45), Total Weight (09.913), Percentage (37), Amount (\$123.45), KDM (\$123.45), and Making Charges (\$123.45). At the bottom, there's a "System Information" section with Last Modified By (Sample Text).

## To create a Record Type Gold & Silver:

The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Item' object. A new Record Type named 'Gold' has been created. The details are as follows:

Field	Value
Record Type Label	Gold
Record Type Name	Gold
Namespace Prefix	
Description	Gold items information
Created By	MATHANKUMAR_G
Modified By	MATHANKUMAR_G
Active	✓

Below the main details, there is a section titled 'Picklists Available for Editing' which lists three fields:

Action	Field	Modified Date
Edit	Expected Days Of Return	9/8/2025, 8:09 AM
Edit	Item Type	9/8/2025, 8:09 AM
Edit	Priority	9/8/2025, 8:09 AM

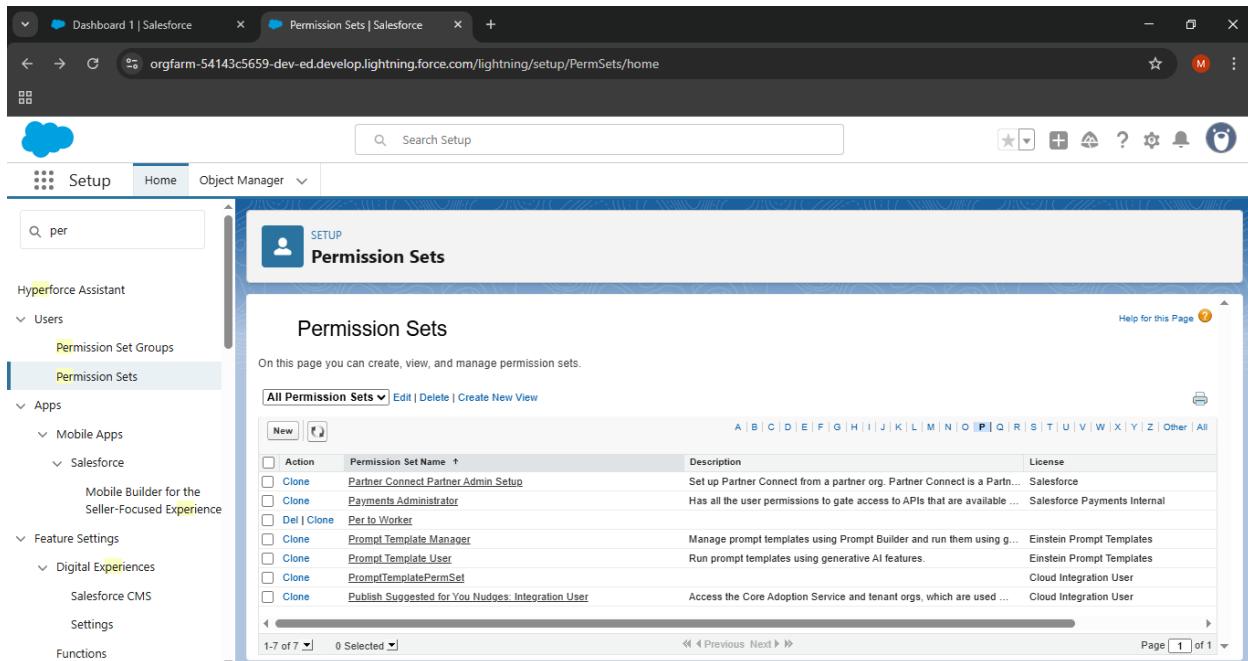
The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Item' object. A new Record Type named 'Silver' has been created. The details are as follows:

Field	Value
Record Type Label	Silver
Record Type Name	Silver
Namespace Prefix	
Description	Silver items information
Created By	MATHANKUMAR_G
Modified By	MATHANKUMAR_G
Active	✓

Below the main details, there is a section titled 'Picklists Available for Editing' which lists three fields:

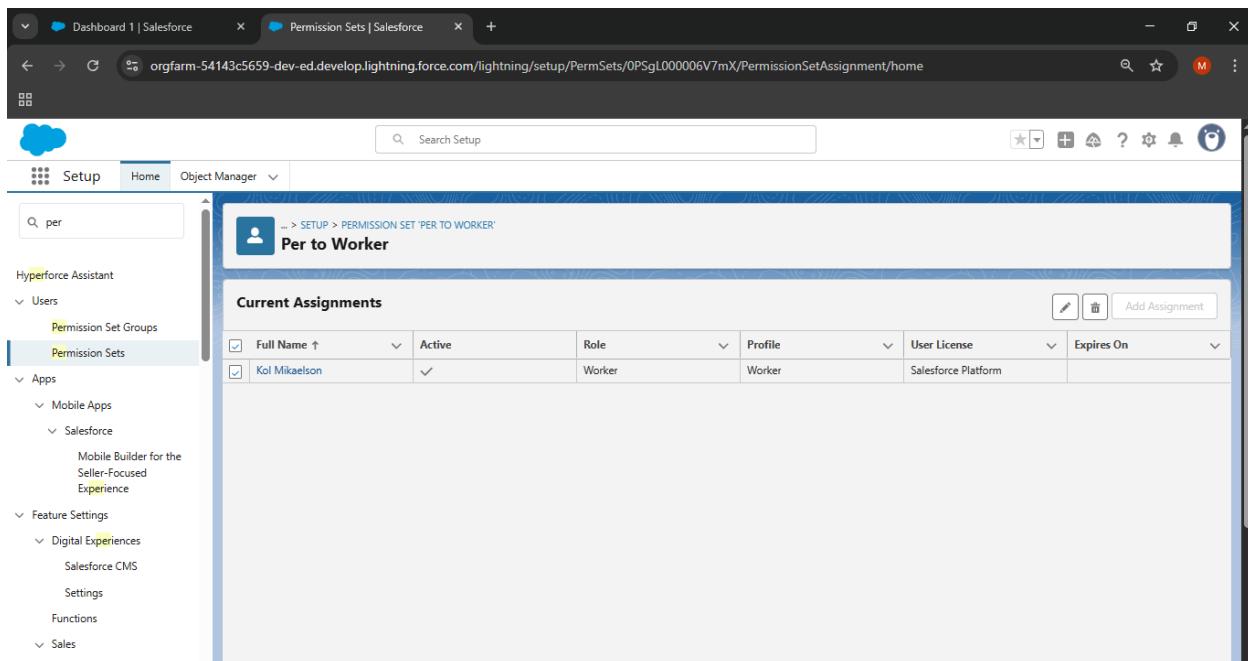
Action	Field	Modified Date
Edit	Expected Days Of Return	9/8/2025, 8:15 AM
Edit	Item Type	9/8/2025, 8:15 AM
Edit	Priority	9/8/2025, 8:15 AM

## Creating permission set:



The screenshot shows the Salesforce Setup interface with the search bar set to "per". The left sidebar is collapsed. The main content area is titled "Permission Sets" and displays a list of permission sets. The list includes:

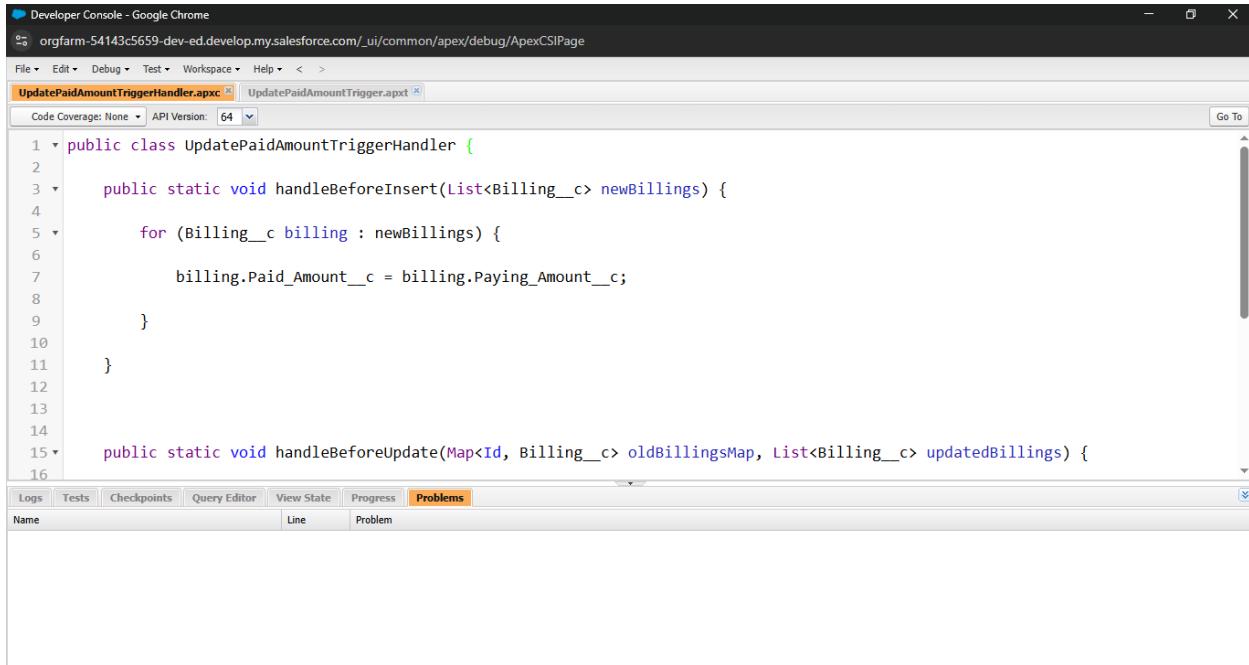
Action	Permission Set Name	Description	License
<input type="checkbox"/>	Clone	Partner Connect Partner Admin Setup	Set up Partner Connect from a partner org. Partner Connect is a Partn... Salesforce
<input type="checkbox"/>	Clone	Payments Administrator	Has all the user permissions to gate access to APIs that are available ... Salesforce Payments Internal
<input type="checkbox"/>	Del   Clone	Per to Worker	
<input type="checkbox"/>	Clone	Prompt Template Manager	Manage prompt templates using Prompt Builder and run them using g... Einstein Prompt Templates
<input type="checkbox"/>	Clone	Prompt Template User	Run prompt templates using generative AI features. Einstein Prompt Templates
<input type="checkbox"/>	Clone	PromptTemplatePermSet	Cloud Integration User
<input type="checkbox"/>	Clone	Publish Suggested for You Nudges_ Integration User	Access the Core Adoption Service and tenant orgs, which are used ... Cloud Integration User



The screenshot shows the "Current Assignments" section for the "Per to Worker" permission set. It lists one assignment:

Full Name	Active	Role	Profile	User License	Expires On
Kol Mikaelson	✓	Worker	Worker	Salesforce Platform	

## Create a Trigger Handler class:



The screenshot shows the Salesforce Developer Console in Google Chrome. The URL is orgfarm-54143c5659-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage. The tab title is 'UpdatePaidAmountTriggerHandler.apxc'. The code editor displays the following Apex code:

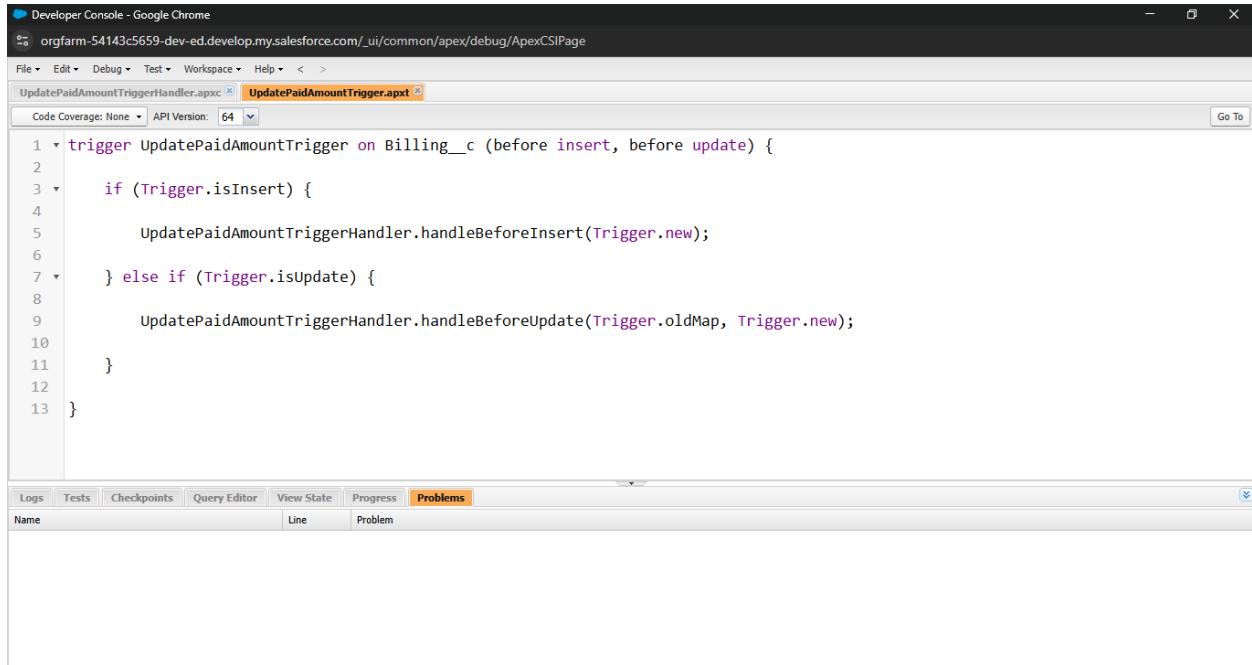
```
1 public class UpdatePaidAmountTriggerHandler {  
2     public static void handleBeforeInsert(List<Billing__c> newBillings) {  
3         for (Billing__c billing : newBillings) {  
4             billing.Paid_Amount__c = billing.Paying_Amount__c;  
5         }  
6     }  
7  
8     public static void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

The code implements two trigger handlers: one for insert operations that sets the Paid\_Amount\_\_c field to the Paying\_Amount\_\_c field, and another for update operations that adds the old Paid\_Amount\_\_c value to the new Paying\_Amount\_\_c value to calculate the total Paid\_Amount\_\_c.

## Source 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;  
        }  
    }  
}
```

## Create the trigger:



The screenshot shows the Salesforce Developer Console interface. The title bar reads "Developer Console - Google Chrome" and the URL is "orgfarm-54143c5659-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage". The main area displays the Apex code for the "UpdatePaidAmountTrigger.apxt" class. The code is as follows:

```
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);
    }
}
```

Below the code editor, there is a navigation bar with tabs: Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The "Problems" tab is currently selected. A table below the tabs lists problems, with columns for Name, Line, and Problem. The table is currently empty.

## Source 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);
    }
}
```

## User Adoption

### Create a Record (Jewel Customer):

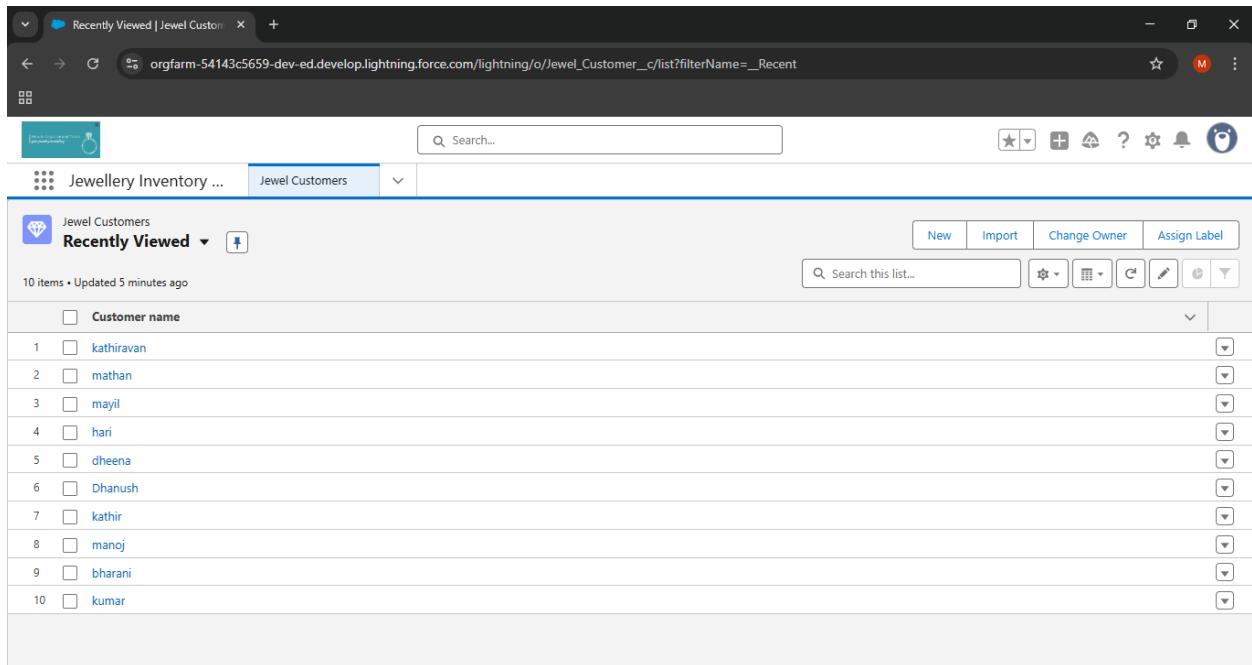
### View a Record(Jewel Customer):Delete a Record(Jewel Customer):

The screenshot shows the Salesforce Lightning interface for creating a new record. The top navigation bar displays "Recently Viewed | Jewel Cust..." and the URL "orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/o/Jewel\_Customer\_\_c/list?filterName=\_Recent". The page title is "Jewellery Inventory ... Jewel Customers". On the left, an App Launcher is open with a search bar containing "jeweller". The "Jewellery Inventory System" app is selected. The main list area shows 10 customer records with checkboxes and dropdown menus. The records are:

Index	Customer Name
4	hari
5	dheena
6	Dhanush
7	kathir
8	manoj
9	bharani
10	kumar

The screenshot shows the Salesforce Lightning interface displaying the "Recently Viewed" list for the "Jewel Customers" app. The top navigation bar and URL are identical to the previous screenshot. The page title is "Jewellery Inventory ... Jewel Customers". The left sidebar shows the "Recently Viewed" section with 10 items updated a minute ago, listing customer names: kathiravan, mathan, mayil, hari, dheena, Dhanush, kathir, manoj, bharani, and kumar. The main list area is empty, showing the "Jewel Customers" app icon and a "Search this list..." bar. A "New" button is visible at the top right.

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

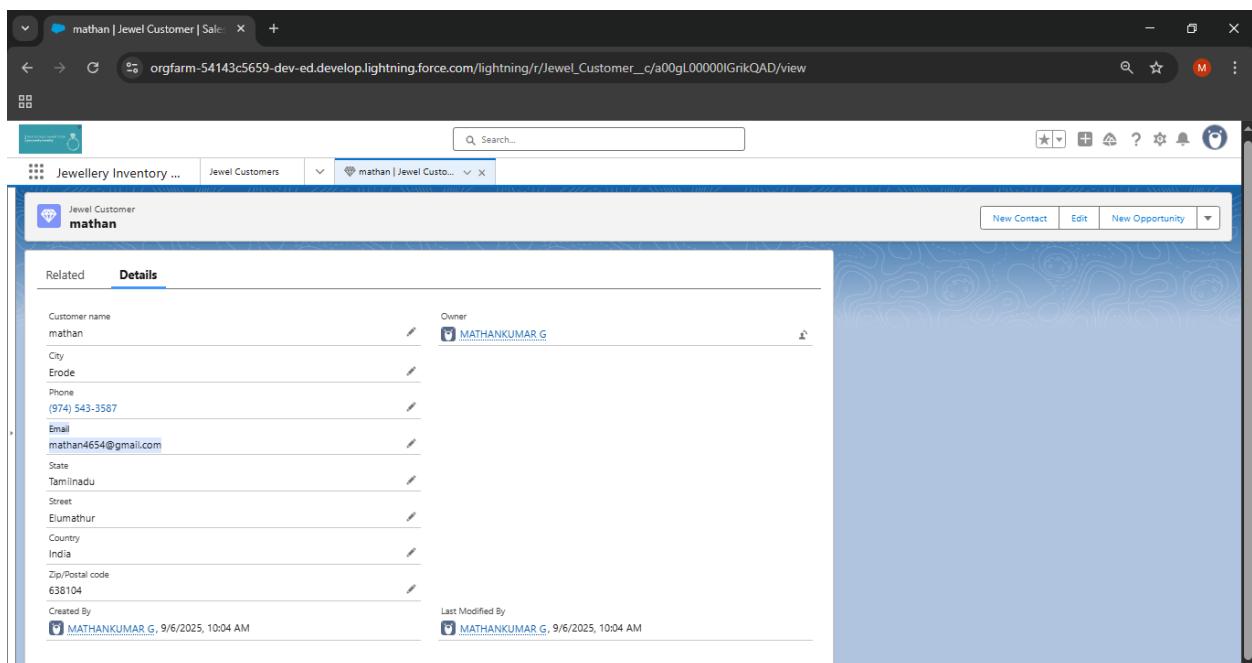


Jewellery Inventory ... Jewel Customers

Recently Viewed ▾

10 items • Updated 5 minutes ago

	Customer name	
1	kathiravan	▼
2	mathan	▼
3	mayil	▼
4	hari	▼
5	dheena	▼
6	Dhanush	▼
7	kathir	▼
8	manoj	▼
9	bharani	▼
10	kumar	▼



mathan | Jewel Customer | Sales

Jewellery Inventory ... Jewel Customers mathan | Jewel Cust...

Jewel Customer mathan

Related Details

Customer name	Owner
mathan	MATHANKUMAR G
City	Erode
Phone	(974) 543-3587
Email	mathan4654@gmail.com
State	TamilNadu
Street	Erumathur
Country	India
Zip/Postal code	638104
Created By	MATHANKUMAR G, 9/6/2025, 10:04 AM
Last Modified By	MATHANKUMAR G, 9/6/2025, 10:04 AM

Recently Viewed | Prices | Sales

orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/o/Price\_c/list?filterName=\_Recent

Jewellery Inventory ... Prices

Recently Viewed

10 items • Updated a few seconds ago

Price Id

1	Item-05
2	Item-10
3	Item-09
4	Item-08
5	Item-07
6	Item-06
7	Item-02
8	Item-03
9	Item-04
10	Item-01

New Import Change Owner Assign Label

Search this list...

Search...

Item-02 | Price | Salesforce

orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/r/Price\_c/a03gL00000BeSelQAF/view

Jewellery Inventory ... Prices

Item-02

Related Details

Price Id  
Item-02

Owner  
[MATHANKUMAR.G](#)

Gold Price  
\$50,000

Silver Price  
\$45,000.00000

Created By  
[MATHANKUMAR.G](#), 9/8/2025, 12:08 AM

Last Modified By  
[MATHANKUMAR.G](#), 9/8/2025, 12:08 AM

New Contact Edit New Opportunity

Recently Viewed | Items | Sales

orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/o/Item\_c/list?filterName=\_Recent

Jewellery Inventory ... Items

Items Recently Viewed

10 items • Updated a few seconds ago

	Item Id
1	Item-06
2	Item-10
3	Item-09
4	Item-08
5	Item-07
6	Item-05
7	Item-04
8	Item-03
9	Item-02
10	Item-01

New Import Change Owner Assign Label

Search this list...

Search...

Star More Help Bell User

Item-02 | Item | Salesforce

orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/r/Item\_c/a01gL00000Kwh1AQAR/view

Jewellery Inventory ... Items Item-02 | Item

Item Item-02

New Contact Edit New Opportunity

Related	Details
Item Id	Item-02
Purity	19
Item Type	Silver
Prices	Item-02
Gold Price	\$5,000.00
Customer Name	kumar
Ornament	silver Ring
Weight	25.00000

Owner MATHANKUMAR G

Recently Viewed | Customer Order

orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/o/Customer\_Order\_c/list?filterName=\_Recent

Jewellery Inventory ... Customer Orders

Customer Orders Recently Viewed

10 items • Updated a few seconds ago

	Customer Order Id
1	Item-05
2	Item-10
3	Item-09
4	Item-08
5	Item-07
6	Item-06
7	Item-04
8	Item-03
9	Item-02
10	Item-01

New Import Assign Label

Search this list...

Search...

Customer Orders

Item-02 | Customer Order | Sale

orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/r/Customer\_Order\_c/a02gL000005TteAQAS/view

Jewellery Inventory ... Customer Orders Item-02 | Customer Order

Customer Order  
**Item-02**

New Contact Edit New Opportunity

Related Details

Customer Order Id  
**Item-02**

Customer  
**kumar**

Item  
**Item-02**

Order Status  
**Completed**

Created By  
**MATHANKUMAR G.**, 9/8/2025, 12:10 AM

Last Modified By  
**MATHANKUMAR G.**, 9/8/2025, 12:10 AM

Recently Viewed | Billings | Sales

orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/o/Billing\_c/list?filterName=\_Recent

Jewellery Inventory ... Billings

Billings Recently Viewed

10 items • Updated a few seconds ago

	Billing Id
1	Item-10
2	Item-09
3	Item-08
4	Item-07
5	Item-06
6	Item-05
7	Item-04
8	Item-03
9	Item-02
10	Item-01

Item-02 | Billing | Salesforce

orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/r/Billing\_c/a04gL000009dM1QAM/view

Jewellery Inventory ... Billings Item-02 | Billing

Billing Item-02

Details

Billing Id	Item-02	Owner	MATHANKUMAR G
Item	<u>Item-02</u>		
Ornament	silver Ring		
Stone weight	0.60		
Weight	24.40		
Amount	\$1,096.00		
Gold/Silver Price	\$45.00		
KDM Charge	\$1,043		
Making Charges	\$250.00		
Stones/other price	\$1,900.00		

## Create Reports:

The screenshot shows the Salesforce Reports page. The URL is <https://orgfarm-54143c5659-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=mru>. The page title is "Recent | Reports | Salesforce". The main content area displays a list of recent reports under the "Recent" tab. The list includes:

Report Name	Description	Created By	Created On	Subscribed
New Prices Report	New Prices Report	MATHANKUMAR G	9/9/2025, 6:08 AM	
Billing with Item and Customer order	Billing with Item and Customer order	MATHANKUMAR G	9/10/2025, 12:35 AM	
New item with Billing Report	New item with Billing Report	MATHANKUMAR G	9/10/2025, 1:50 AM	

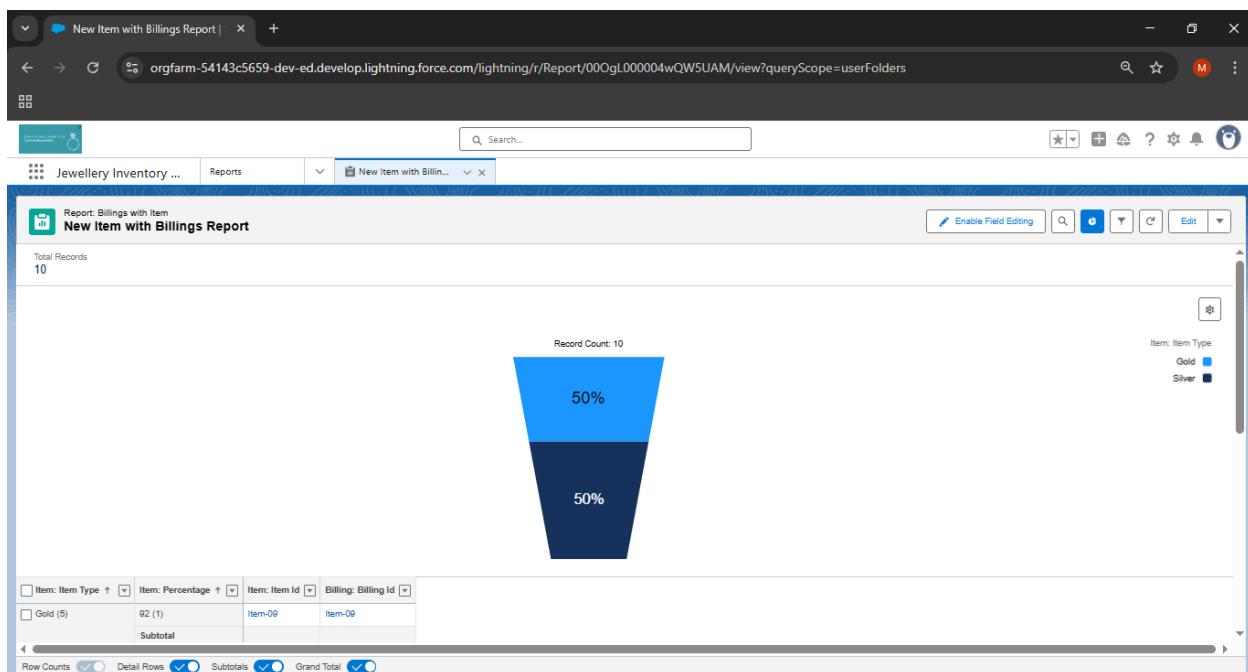
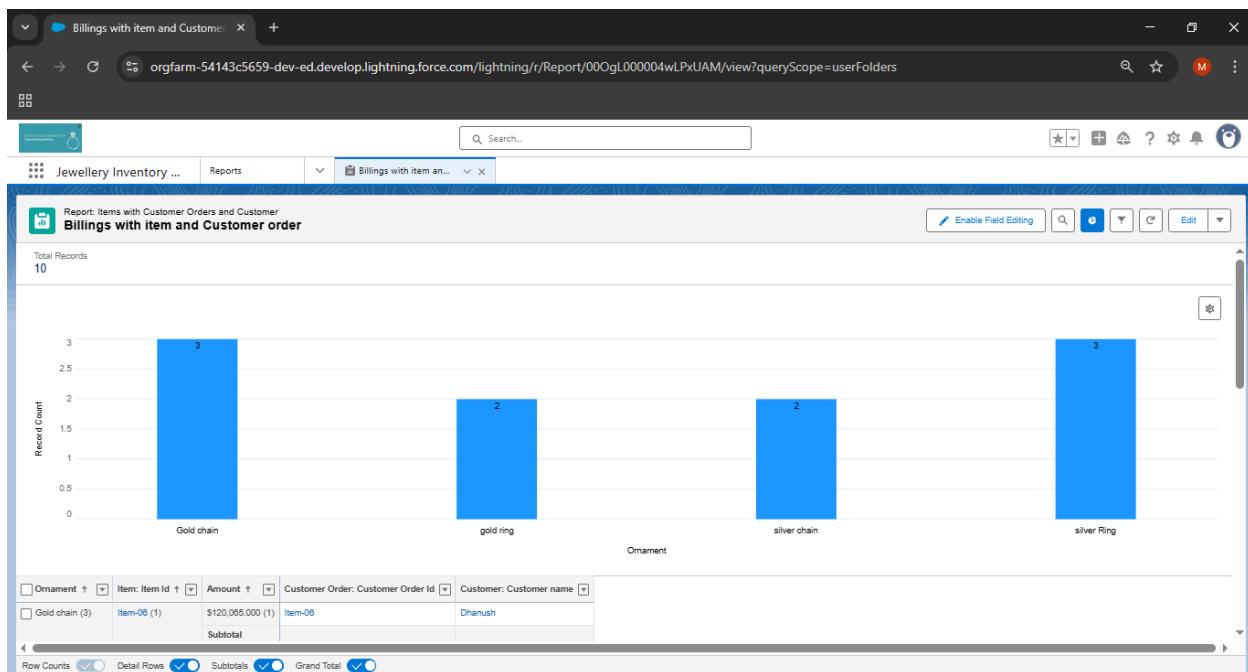
The left sidebar contains navigation links for Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), Folders (Folders, All Folders), and Favorites.

The screenshot shows the detail view of the "New Prices Report". The URL is <https://orgfarm-54143c5659-dev-ed.lightning.force.com/lightning/r/Report/00OgL000004unIJUQ/view?queryScope=userFolders>. The page title is "New Prices Report | Salesforce". The report summary shows:

Total Records	Total Gold Price	Total Silver Price
10	\$578,000	\$518,000.00000

The main content area displays a table of price records:

Price: Price Id	Gold Price	Silver Price
1 Item-01	\$45,000	\$35,000.00000
2 Item-04	\$57,000	\$52,000.00000
3 Item-05	\$58,000	\$54,000.00000
4 Item-02	\$50,000	\$45,000.00000
5 Item-03	\$55,000	\$50,000.00000
6 Item-06	\$59,000	\$55,000.00000
7 Item-09	\$64,000	\$57,000.00000
8 Item-07	\$62,000	\$56,000.00000
9 Item-08	\$63,000	\$56,000.00000
10 Item-10	\$65,000	\$58,000.00000
11	\$578,000	\$518,000.00000



## Create Dashboard:

The screenshot shows a Salesforce dashboard titled "Dashboard 1". It contains three main reports:

- New Item with Billings Report**: A funnel chart showing "Record Count: 10" with 50% in each stage.
- Billings with item and Customer order**: A bar chart showing "Record Count" for various items.
- New Prices Report**: A table showing "Price: Price Id" and "Gold Price" and "Silver Price" for items.

## Create A Flow:

The screenshot shows the Salesforce Flows setup page. The "Flows" tab is selected under "Process Automation". The page displays a list of flow definitions:

Flow Label	Process Type	Acti...	Tem...	Package State	Pac...	Last Modified By	Last Modified ...
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Approvals Workflow: Evaluate Approval Requests	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Approvals Workflow: Process Approval Submission	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Authentication Provider User Registration	Identity User Registration Flow	<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			
Billing Alert Flow	Auto-launched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged	MATHANKUMAR G	10/2/2025, 6:27 AM	
Book Appointment from Invitation	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 Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Chats Routed to Agents and Queues	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

Salesforce Flows Setup Page

**Billing Alert Flow**

**Flow Detail**

Flow Label	Billing Alert Flow	Flow API Name	Billing_Alert_Flow
Description		Namespace Prefix	
Environments	Default	Type	Autolaunched Flow
Active Version	1	URL	/flow/Billing_Alert_Flow
Trigger	Record—Run After Save	Activated/Deactivated By	MATHANKUMAR_G 9/12/2025, 2:48 AM
Modified By	MATHANKUMAR_G 10/2/2025, 6:27 AM	Created By	MATHANKUMAR_G 9/12/2025, 2:48 AM

**Flow Versions**

Action	Flow Label	Version	Description	Built with	Created Date	Type	Status	Progress Status	Run in Mode	API Version for Running the Flow	Log Metrics to Data Cloud
Open   Run   Deactivate	Billing Alert Flow	1		Flow Builder	9/12/2025, 2:48 AM	Autolaunched Flow	Active	Activated	Default Mode	64.0	

Salesforce Flow Builder - Billing Alert Flow - V1

**Start Record-Triggered Flow**

Object: Billing

Trigger: A record is created or updated

Optimize for: Actions and Related Records

**Action**

notice

Run Immediately

Flow Builder Tools: Undo, Redo, Save, Free-Form

Flow Builder Buttons: Run, Debug, View Tests, Save As New Version, Save, Deactivate

Toolbox Elements: Interaction (Action, Subflow, Custom Error), Logic (Assignment, Decision, Loop, Transform, Collection Sort, Collection Filter), Data (Create Records, Update Records)