

CRM APPLICATION FOR JEWEL MANAGEMENT-(DEVELOPER)

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1.INTRODUCTION

1.1 Project Overview

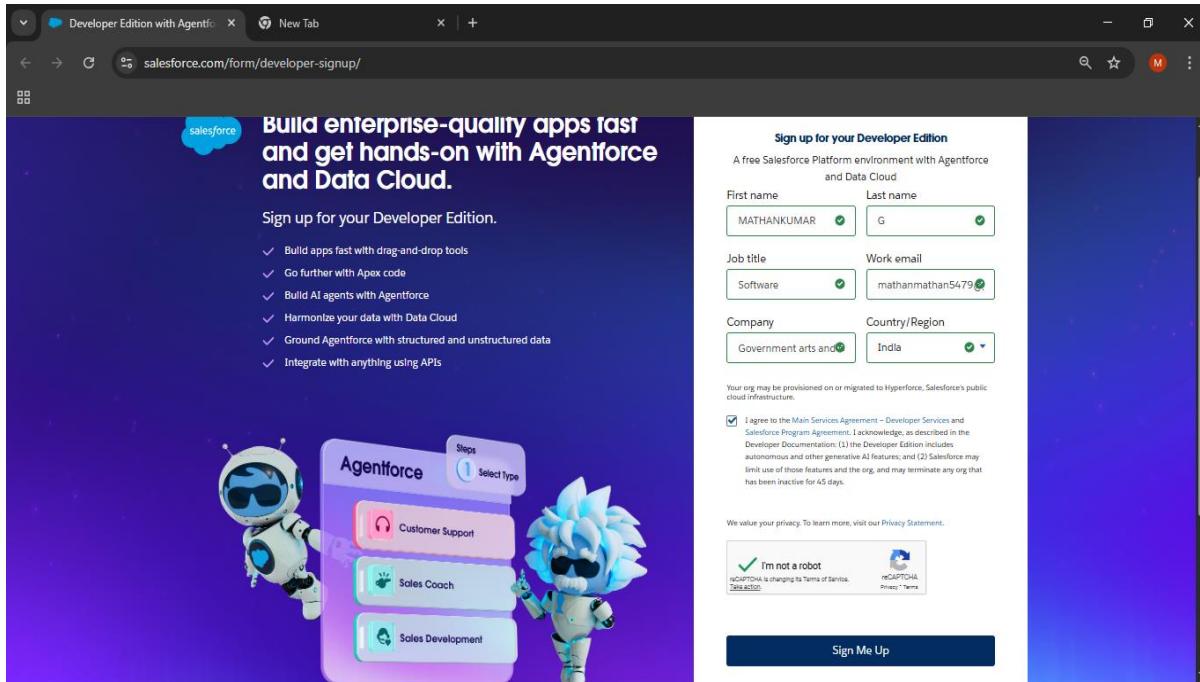
The jewelry industry requires precise management of customer relationships, inventory, sales, and after-sales services to remain competitive. Traditional

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.

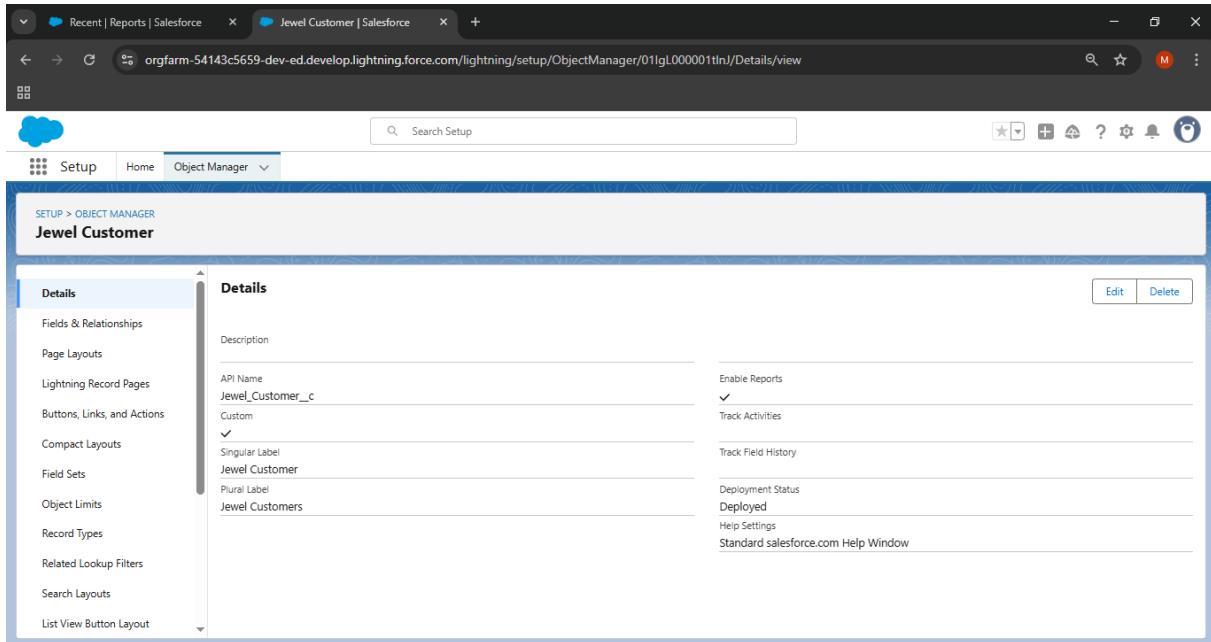
DEVELOPMENT PHASE

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.



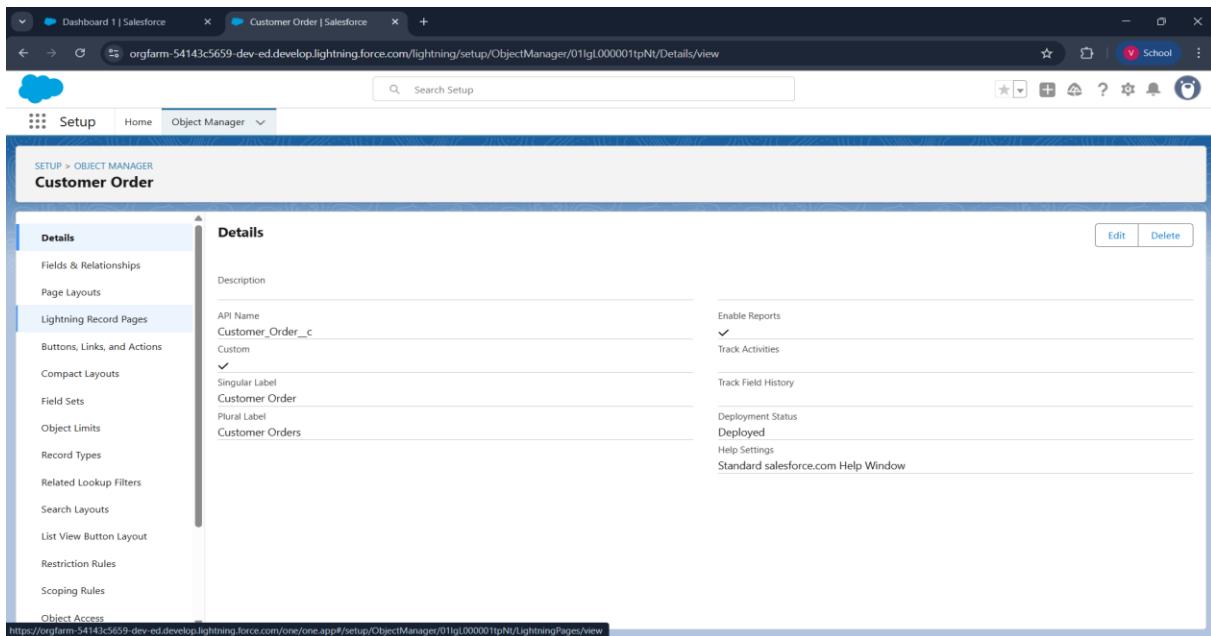
The screenshot shows the Salesforce Object Manager interface for creating a new object named "Jewel Customer".

Object Details:

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

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:** (Text input field)
- Track Field History:** (Text input field)
- Deployment Status:** `Deployed`
- Help Settings:** (Text input field)
- Standard Help Window:** (Text input field)

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' (checked), 'Track Activities' (checked), 'Track Field History', 'Deployment Status' (set to '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 sections for 'User Interface' and 'Tabs'. Under 'Tabs', there is a table titled 'Custom Object Tabs' showing five tabs: 'Billing' (Car style), 'Customer Orders' (Airplane style), 'Items' (Books style), 'Jewel Customers' (Jewel style), and 'Prices' (Postage style). Below this is a section for 'Web Tabs' which states '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 is associated with 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 is associated with 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 URL is <https://orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01rgL00000F0G7v%3Fsetupid%3DCustomTabs>. The page title is 'Tabs | Salesforce'. The main content area displays the 'Custom Tab Definition Detail' for the 'Items' tab. 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 MATHANKUMAR_G on 8/31/2025, 11:38 PM.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The URL is <https://orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01rgL00000F0bDT%3Fsetupid%3DCustomTabs>. The page title is 'Tabs | Salesforce'. The main content area displays the 'Custom Tab Definition Detail' for the 'Prices' tab. 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 MATHANKUMAR_G on 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), Modified By (MATHANKUMAR_G), 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-ed.develop.lightning.force.com%2FappBuilder.app%3Fid%3D02ugL000006EuA9QAK>. The page title is "Jewellery Inventory System - Lightning App Builder". 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 small logo, a "Primary Color Hex Value" set to "#0070D2", and a "Clear" button. Below these, there is an "Org Theme Options" section with a checkbox for "Use the app's image and color instead of the org's custom theme". At the bottom, there is an "App Launcher Preview" section showing a preview of the app icon and name.

The screenshot shows the Lightning App Builder interface. On the left, there's a sidebar with sections like 'App Details & Branding', 'App Options', and 'Utility Items (Desktop Only)'. The 'Navigation Items' section is currently selected. 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.' Below this, there are two lists: 'Available Items' (Accounts, Activation Targets, Activations, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations) and 'Selected Items' (Jewel Customers, Items, Customer Orders, Prices, Billings, Reports, Dashboards). Navigation arrows between the lists allow for reordering.

Creating Lookup Relationship:

The screenshot shows the Salesforce Setup interface under 'Object Manager'. A custom field named 'Customer' is being created for the 'Customer Order' object. The 'Fields & Relationships' tab is selected in the sidebar. The 'Custom Field Definition Detail' section shows the following details:

- Field Information**: Field Label: Customer, Field Name: Customer, API Name: Customer__c, Description: Help Text, Data Owner: Field Usage, Data Sensitivity Level: Low, Compliance Categorization: Standard, Created By: MATHANKUMAR_G, 9/3/2025, 10:24 PM, Modified By: MATHANKUMAR_G, 9/3/2025, 10:24 PM.
- Validation Rules**: None listed.
- Lookup Options**: Related To: Jewel Customer, Related List Label: Customer Orders, Required: Unchecked, Child Relationship Name: Customer_Orders.

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' on the 'Customer Order' object. The 'Fields & Relationships' tab is selected. In the 'Field Information' section, the field label is 'Item', the field name is 'Item', and the API name is 'Item__c'. The object name is 'Customer Order' and the data type is 'Master-Detail'. Under 'Master-Detail Options', the related to object is '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.'

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', the field name is 'City', and the API name is 'City__c'. The object name is 'Jewel Customer' and the data type is 'Text'. Under 'General Options', the 'Required' checkbox is checked. The sharing setting is 'Case Sensitive'.

Creating the Phone field in object Jewel Customer:

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled "Jewel Customer" and includes sections for 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, and List View Button Layout. The "Fields & Relationships" section is currently selected. On the right, the "Custom Field Definition Detail" for a field named "Phone" is displayed. The "Field Information" section shows the following details:

- Field Label: Phone
- Field Name: Phone
- API Name: Phone__c
- Description: Help Text
- Data Owner: Field Usage
- Data Sensitivity Level: Standard
- Compliance Categorization: Not Specified
- Created By: MATHANKUMAR_G, 9/3/2025, 10:31 PM
- Modified By: MATHANKUMAR_G, 9/3/2025, 10:31 PM

The "General Options" section includes a "Required" checkbox (unchecked) and a "Default Value" field. A "Validation Rules" section at the bottom contains a "New" button and a "Validation Rules Help" link.

Creating The Email Field In Object Jewel Customer:

The screenshot shows the Salesforce Object Manager interface, identical to the previous one but with a different custom field definition. The "Fields & Relationships" section is selected in the left sidebar. On the right, the "Custom Field Definition Detail" for a field named "Email" is displayed. The "Field Information" section shows the following details:

- Field Label: Email
- Field Name: Email
- API Name: Email__c
- Description: Help Text
- Data Owner: Field Usage
- Data Sensitivity Level: Standard
- Compliance Categorization: Not Specified
- Created By: MATHANKUMAR_G, 9/3/2025, 10:32 PM
- Modified By: MATHANKUMAR_G, 9/3/2025, 10:32 PM

The "General Options" section includes checkboxes for "Required" (unchecked), "Unique" (unchecked), "External ID" (unchecked), and a "Default Value" field. A "Validation Rules" section at the bottom contains a "New" button and a "Validation Rules Help" link.

Creating The Number Field In Item Object:

The screenshot shows the Salesforce Setup interface for creating a custom field. The left sidebar is titled 'Object Manager' and lists various options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Item Custom Field' and 'Purity'. 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			

Below this, the 'General Options' section includes checkboxes for Required, Unique, External ID, and AI Prediction. The 'Validation Rules' tab is visible at the top right.

Creating Picklist Field In Item Object:

The screenshot shows the Salesforce Setup interface for creating a custom field. The left sidebar is titled 'Object Manager' and lists various options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Item Custom Field' and 'Item Type'. 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			

Below this, the 'General Options' section includes checkboxes for Required and Default Value. The 'Picklist Options' tab is visible at the bottom.

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 "Object Name" is listed as "Price" and the "Data Type" is "Currency". The "General Options" section indicates that the field is "Required". The "Formula Options" section is collapsed. On the left sidebar, under "Fields & Relationships", the "Page Layouts" section is expanded, showing options like 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.

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 "Object Name" is listed as "Item" and the "Data Type" is "Formula". The "Formula Options" section shows a formula: `Prices__r.Gold_Price__c / 10`, with "Decimal Places" set to 2. The "General Options" section indicates that the field is "Required". The "Formula Options" section is expanded. On the left sidebar, under "Fields & Relationships", the "Page Layouts" section is expanded, showing options like 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.

Creating Remaining Fields in Objects:

The screenshot shows the Salesforce Object Manager interface for the 'Jewel Customer' object. The left sidebar contains navigation links such as 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, and Scoping Rules. The main content area is titled 'Fields & Relationships' and lists 11 items, sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

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 contains navigation links such as 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, and List View Button Layout. The main content area is titled 'Fields & Relationships' and lists 6 items, sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

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.

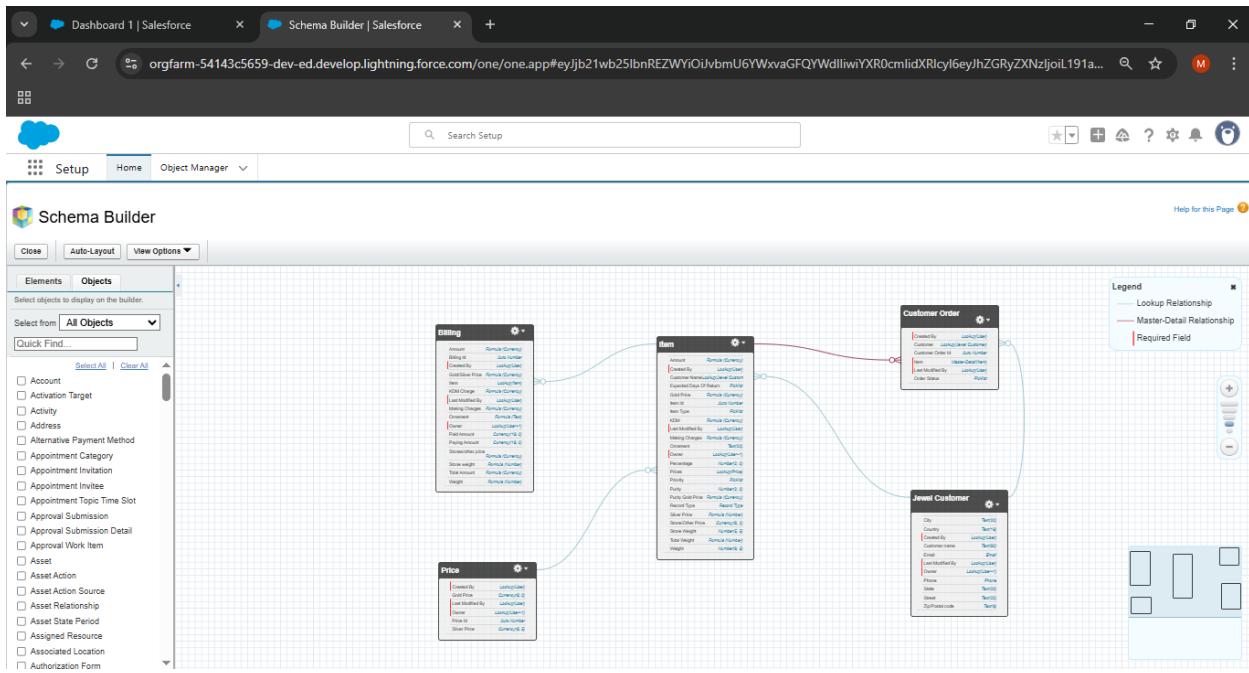
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Billing Id	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Gold/Silver Price	Gold_Silver_Price__c	Formula (Currency)		
Item	Item__c	Lookup(Item)		✓
KDM Charge	KDM_Charge__c	Formula (Currency)		
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, with rows for Low, Medium, High, and Critical levels. A legend indicates that yellow cells represent 'Included Value' and grey cells represent 'Excluded Value'. Buttons at the bottom allow users to include or exclude values from the dependent picklist.

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 profile types.
- Data Share Snowflake Connections**: Similar grid for Snowflake connections.
- Data Share Targets**: Grid for Data Share Targets.
- Data Share Target Connection**: Grid for Data Share Target Connections.
- Work Plan Templates**, **Work Step Templates**, **Work Types**, **Work Type Groups**: Grids for Work-related configurations.
- Custom Object Permissions**: Grids for Billings, Customer Orders, Items, Jewel Customers, and Prices.
- Session Settings**: Set session times out after 2 hours of inactivity and session security level required at login to None.
- Password Policies**: Set user passwords to expire in 90 days.

Create Worker Profile:

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

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	Custom Profile	✓
User License	Salesforce Platform	Created By	MATHANKUMAR_G_ 9/5/2025, 11:00 AM
Description		Modified By	MATHANKUMAR_G_ 10/1/2025, 6:15 AM
Page Layouts			
Standard Object Layouts			
Global	Global Layout [View Assignment]	Lead	Lead Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Location	Location Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Location Group	Location Group Layout [View Assignment]
Account	Account Layout [View Assignment]	Location Group 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: Billings, Customer Orders, Items, Sellers, Streaming Channels, User External Credentials, Contact Point Addresses, Contact Point Consents, and Contact Point Emails. Each object has a grid of permissions for Read, Create, Edit, Delete, View All Records, Modify All Records, and View All Fields. The "Customer Orders" object is highlighted with yellow rows. Below the permissions, there are sections for "Session Settings" (Session Times Out After: 2 hours of inactivity) and "Password Policies" (User passwords expire in: 90 days, Enforce password history: 3 passwords remembered).

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". The "Role Edit" section contains fields for Label (Gold Smith), Role Name (Gold_Smith), This role reports to (CEO), and Role Name as displayed on reports (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, followed by 'CEO', 'CFO', 'COO', 'Gold Smith', and 'Worker'. 'Worker' is the newly created role. Other entries include 'SVP_Customer Service & Support' and 'Customer Support, International' under 'Customer Support, North America'. Action buttons (Edit, Del, Assign) are available for each role node.

Create User Niklaus Mikaelson & Kol Mikaelson:

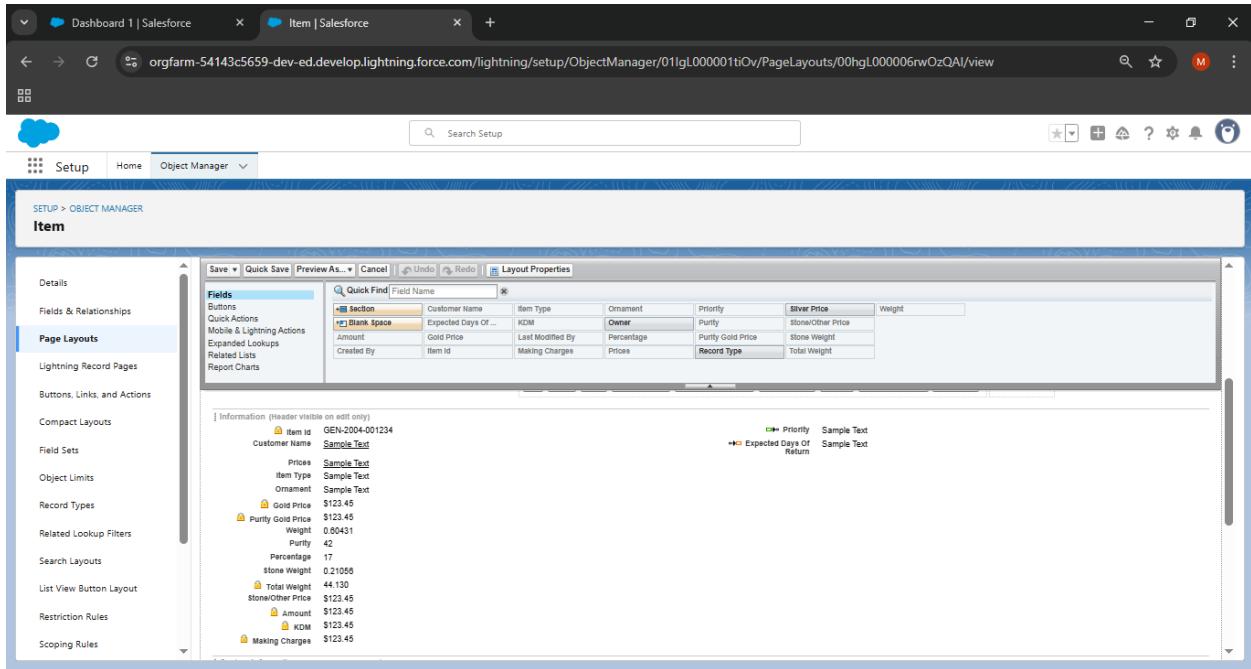
The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar is collapsed, and the main area displays the 'Users' setup page. The user being created is named 'Niklaus Mikaelson'. The 'User Detail' section shows the following information:

Name	Niklaus Mikaelson	Role	Gold Smith
Alias	nmika	User License	Salesforce
Email	mathamathan5479@gmail.com [Verify]	Profile	Gold Smith
Username	niklaus5467@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	Niklaus	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"/>

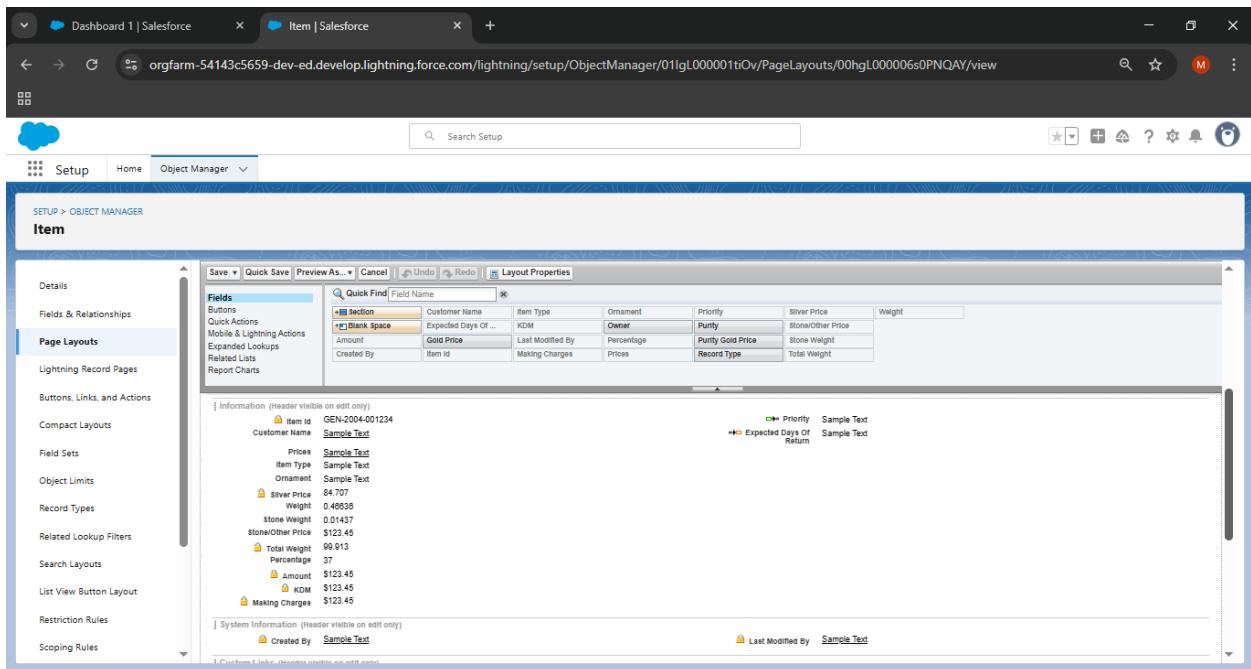
The screenshot shows the Salesforce Setup interface for creating another new user. The left sidebar is collapsed, and the main area displays the 'Users' setup page. The user being created is named 'Kol Mikaelson'. The 'User Detail' section shows the following information:

Name	Kol Mikaelson	Role	Worker
Alias	K milk	User License	Salesforce Platform
Email	mathamathan5479@gmail.com [Verify]	Profile	Worker
Username	mikaelson4357@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	Mikaelson	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:



To Create a Silver Page layout:



To create a Record Type Gold & Silver:

The screenshot shows the Salesforce Object Manager interface. The left sidebar is collapsed. The main area displays the 'Item' object details. The record type is set to 'Gold'. The 'Record Types' section is selected in the sidebar.

Record Type Gold
Back to Custom Object: Item

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

Record Type Label	Gold	Active	✓		
Record Type Name	Gold				
Namespace Prefix					
Description	Gold items information				
Created By	MATHANKUMAR_G	9/8/2025, 8:09 AM	Modified By	MATHANKUMAR_G	10/1/2025, 8:23 AM

Picklists Available for Editing

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 Object Manager interface. The left sidebar is collapsed. The main area displays the 'Item' object details. The record type is set to 'Silver'. The 'Record Types' section is selected in the sidebar.

Record Type Silver
Back to Custom Object: Item

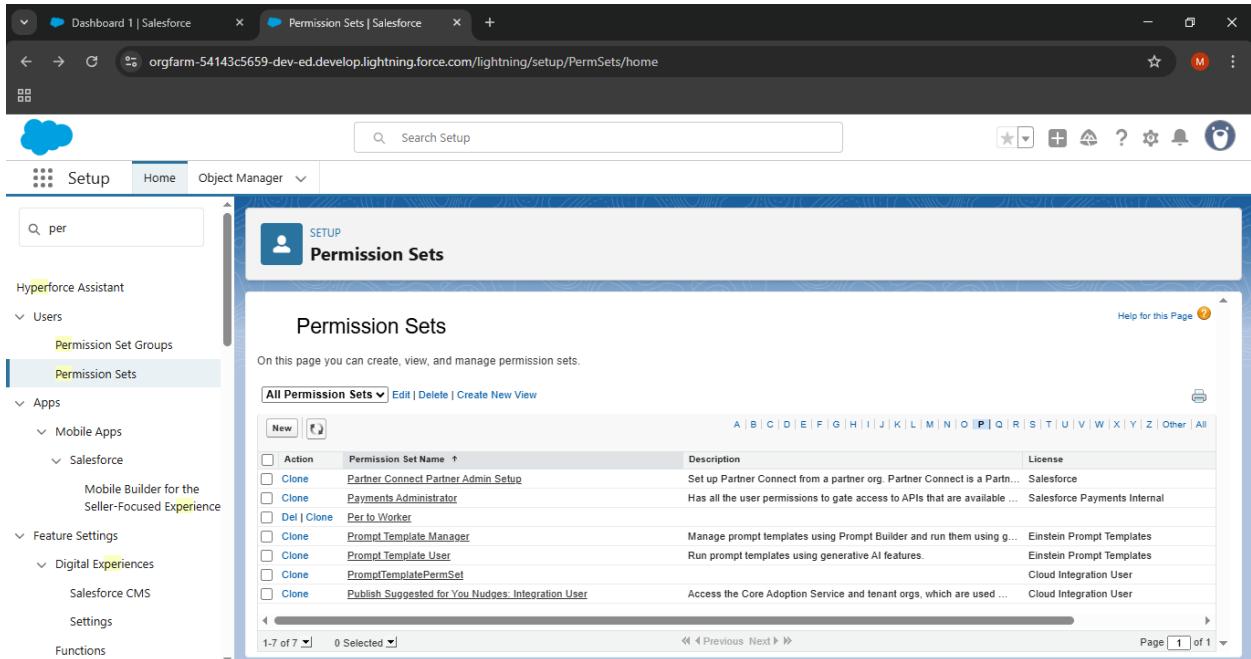
Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

Record Type Label	Silver	Active	✓		
Record Type Name	Silver				
Namespace Prefix					
Description	Silver items information				
Created By	MATHANKUMAR_G	9/8/2025, 8:15 AM	Modified By	MATHANKUMAR_G	9/8/2025, 8:15 AM

Picklists Available for Editing

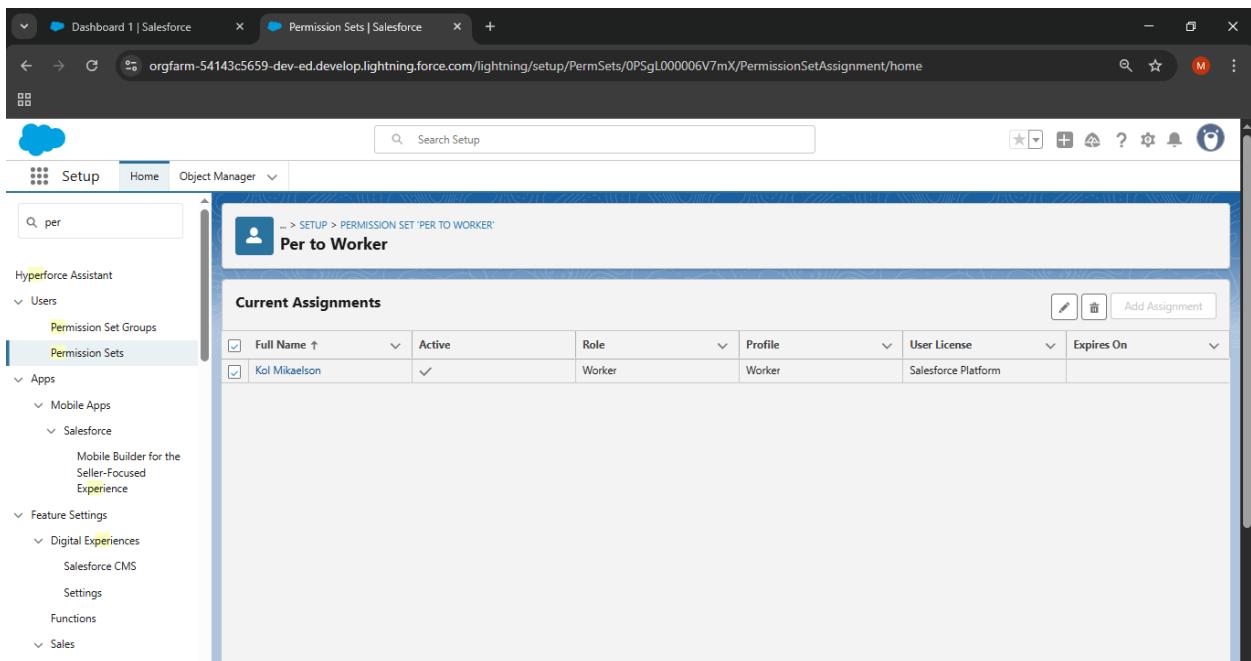
Action	Field	Modified Date
Edit	Expected Days Of Return	9/8/2025, 8:15 AM
Edit	Item Type	9/8/2025, 8:15 AM
Edit	Priority	9/8/2025, 8:15 AM

Creating permission set:



The screenshot shows the Salesforce Setup interface for managing Permission Sets. The left sidebar is collapsed, and the main area displays a list of permission sets. The list includes:

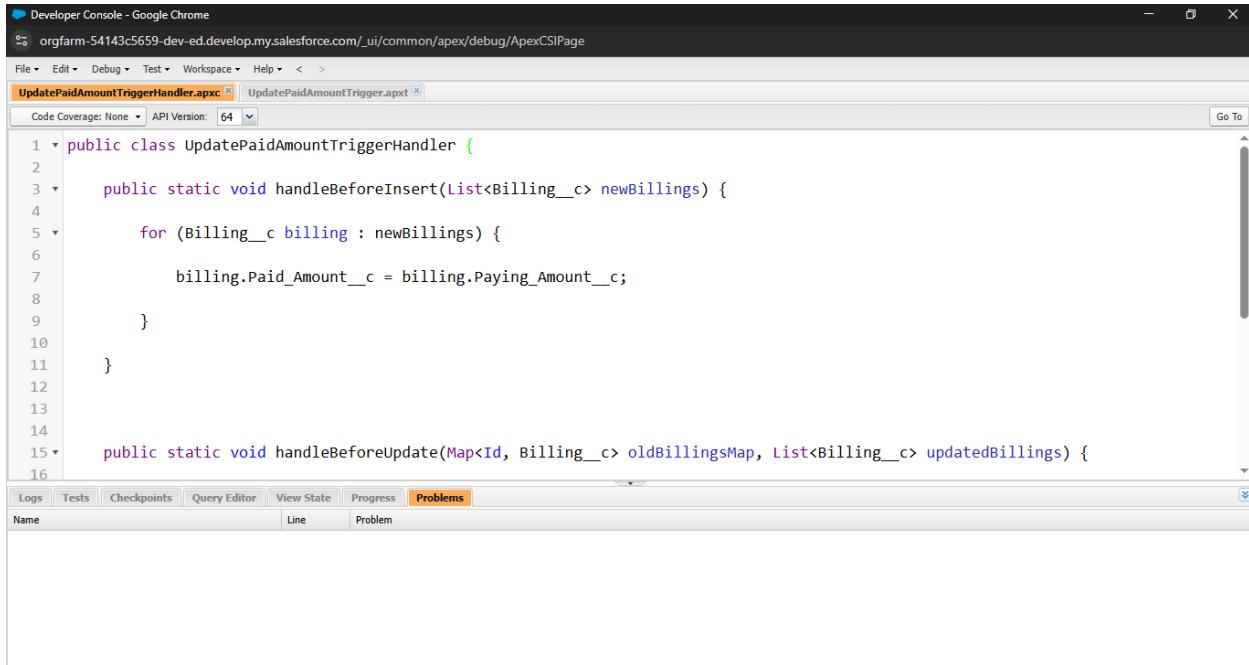
Action	Permission Set Name	Description	License
<input type="checkbox"/>	Clone	Partner Connect Partner Admin Setup	Set up Partner Connect from a partner org. Partner Connect is a Partn... Salesforce
<input type="checkbox"/>	Clone	Payments Administrator	Has all the user permissions to gate access to APIs 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 assignment details for the 'Per to Worker' permission set. The current assignments table lists one user, Kol Mikaelson, who is active, has a Worker role, and is assigned to the Worker profile and Salesforce Platform license. The table includes columns for Full Name, Active, Role, Profile, User License, and Expires On.

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 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 tabs at the top are "UpdatePaidAmountTriggerHandler.apxc" (selected) and "UpdatePaidAmountTrigger.apxt". The code editor displays the following Apex code:

```
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
```

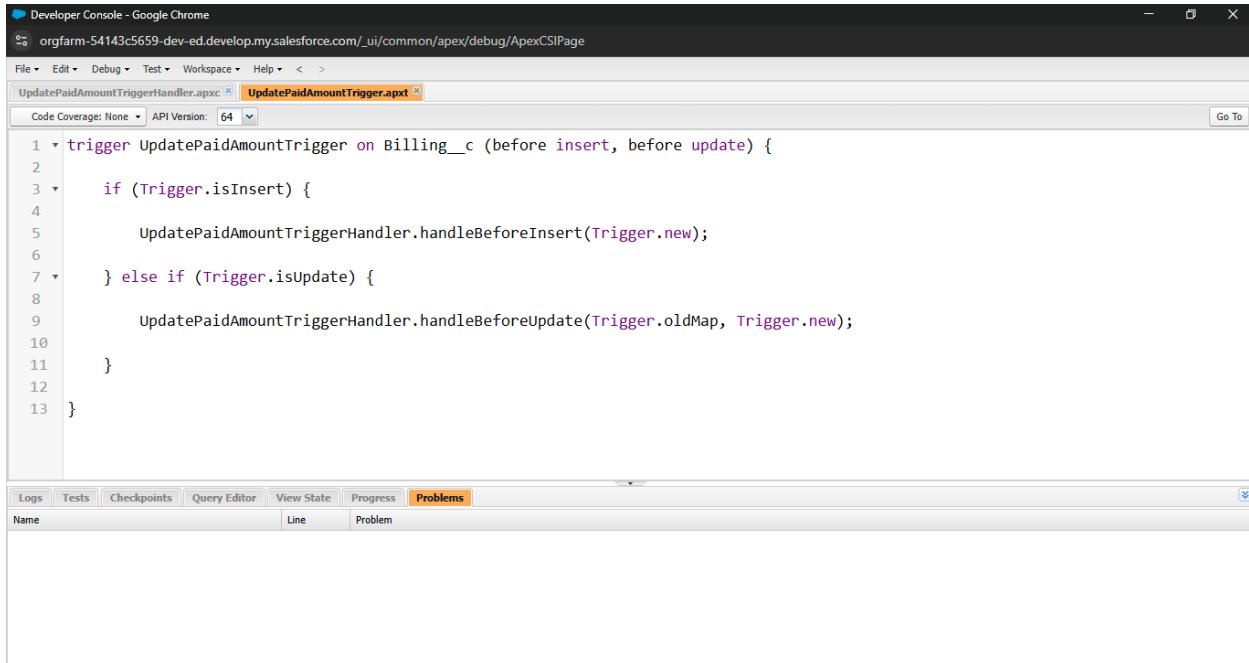
Below the code editor is a navigation bar with tabs: Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems (selected). The Problems tab shows a table with columns: Name, Line, and Problem. The table is currently empty.

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 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 trigger:

```
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);
    }
}
```

The code editor has tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The Problems tab is selected, showing no errors.

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):

Recently Viewed | Jewel Custom

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

Jewellery Inventory ... Jewel Customers

App Launcher

Search...

New Import Change Owner Assign Label

Search this list...

Apps

Jewellery Inventory System

Items

No results

View All

4	<input type="checkbox"/> hari	hari
5	<input type="checkbox"/> dheena	dheena
6	<input type="checkbox"/> Dhanush.	Dhanush.
7	<input type="checkbox"/> kathir	kathir
8	<input type="checkbox"/> manoj	manoj
9	<input type="checkbox"/> bharani	bharani
10	<input type="checkbox"/> kumar	kumar

Recently Viewed | Jewel Custom

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

Jewellery Inventory ... Jewel Customers

Jewel Customers Recently Viewed

10 items • Updated a minute ago

Customer name

1	<input type="checkbox"/> kathiravan	kathiravan
2	<input type="checkbox"/> mathan	mathan
3	<input type="checkbox"/> mayil	mayil
4	<input type="checkbox"/> hari	hari
5	<input type="checkbox"/> dheena	dheena
6	<input type="checkbox"/> Dhanush.	Dhanush.
7	<input type="checkbox"/> kathir	kathir
8	<input type="checkbox"/> manoj	manoj
9	<input type="checkbox"/> bharani	bharani
10	<input type="checkbox"/> kumar	kumar

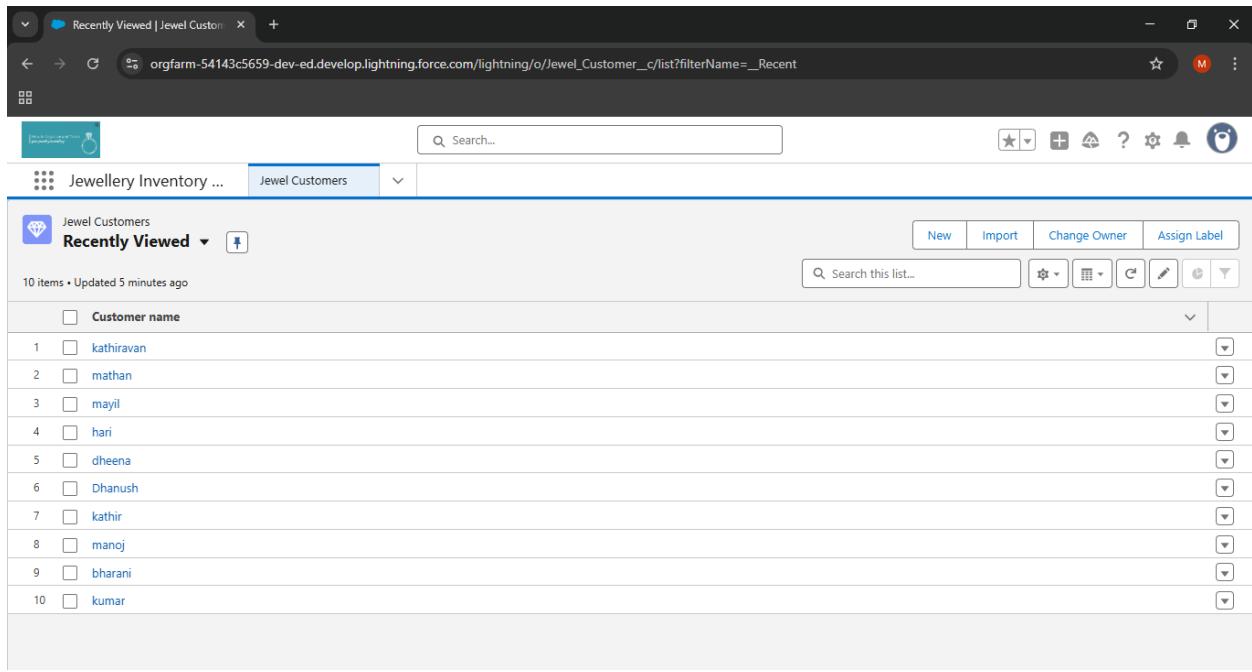
New Import Change Owner Assign Label

Search this list...

Items Customer Orders Prices Billings Reports Dashboards Edit

https://orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/o/jewel_Customer_c/home

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

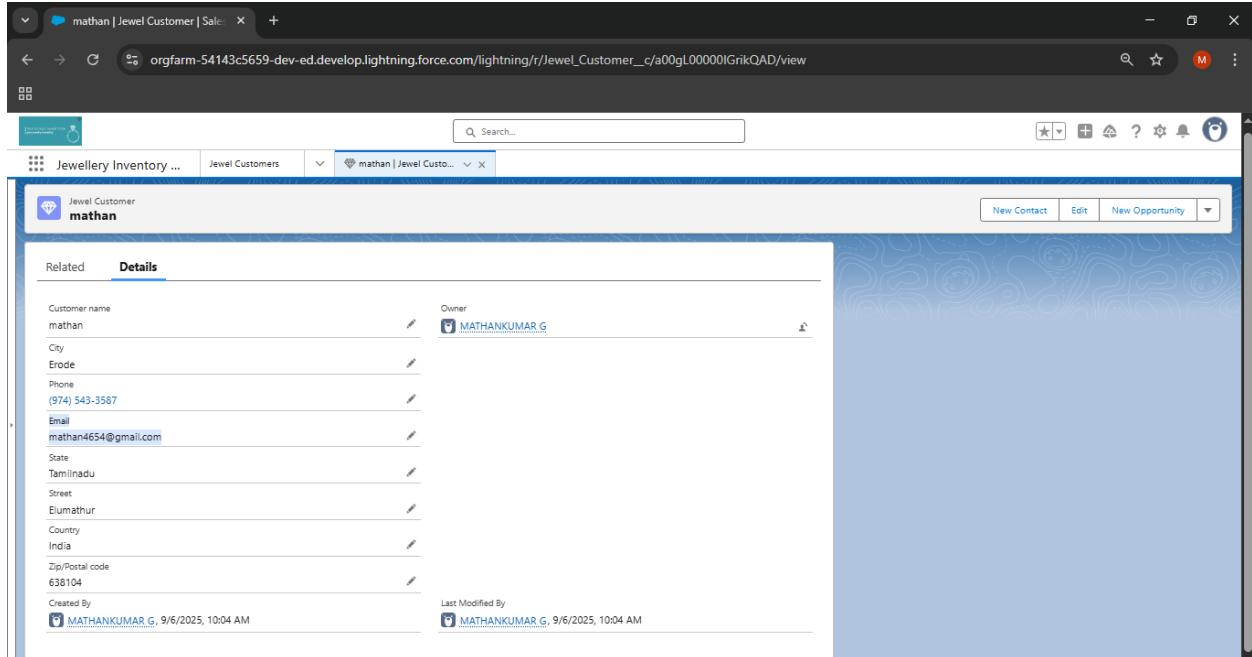


The screenshot shows the 'Recently Viewed' list of Jewel Customers. The list contains 10 items, all labeled 'Customer name'. The names listed are: kathiravan, mathan, mayil, hari, dheena, Dhanush, kathir, manoj, bharani, and kumar. Each item has a checkbox next to it and a dropdown arrow icon to its right.

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	▼



The screenshot shows the details of a specific Jewel Customer record for 'mathan'. The record includes fields for Customer name, City, Phone, Email, State, Street, Country, Zip/Postal code, Created By, and Last Modified By. The owner of the record is listed as 'MATHANKUMAR G'.

mathan | Jewel Customer | Sales

Jewel Customer
mathan

Details

Customer name	Owner
mathan	MATHANKUMAR G
City	Erode
Phone	(974) 543-3587
Email	mathan4654@gmail.com
State	Tamilnadu
Street	Eumathur
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

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 | Price

Price
Item-02

New Contact Edit New Opportunity

Related Details

Price Id	Item-02	Owner	MATHANKUMAR.G
Gold Price	\$50,000	Last Modified By	MATHANKUMAR.G, 9/8/2025, 12:08 AM
Silver Price	\$45,000.00000		
Created By	MATHANKUMAR.G, 9/8/2025, 12:08 AM		

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 Import Change Owner Assign Label

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

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

New Import Assign Label

Search this list...

Customer Order Id

Item-05

Item-10

Item-09

Item-08

Item-07

Item-06

Item-04

Item-03

Item-02

Item-01

Item-02 | Customer Order | Sales

orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/r/Customer_Order_c/a02gL000005TteAQAS/view

Jewellery Inventory ... Customer Orders

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

New Import Change Owner Assign Label

Search this list...

Billings Item-02

Owner MATHANKUMAR G

Billing Id: Item-02
Item: Item-02
Ornament: silver Ring
Stone weight: 0.60
Weight: 24.40
Amount: \$1,098.00
Gold/Silver Price: \$45.00
KDM Charge: \$1,043
Making Charges: \$250.00
Stones/other price: \$1,400.00

Item-02 | Billing | Salesforce

orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/r/Billing__c/a04gL000009dM1QAM/view

Jewellery Inventory ... Billings

Billing Item-02

Related Details

Billing Id: Item-02
Item: Item-02
Ornament: silver Ring
Stone weight: 0.60
Weight: 24.40
Amount: \$1,098.00
Gold/Silver Price: \$45.00
KDM Charge: \$1,043
Making Charges: \$250.00
Stones/other price: \$1,400.00

New Contact Edit New Opportunity

Create Reports:

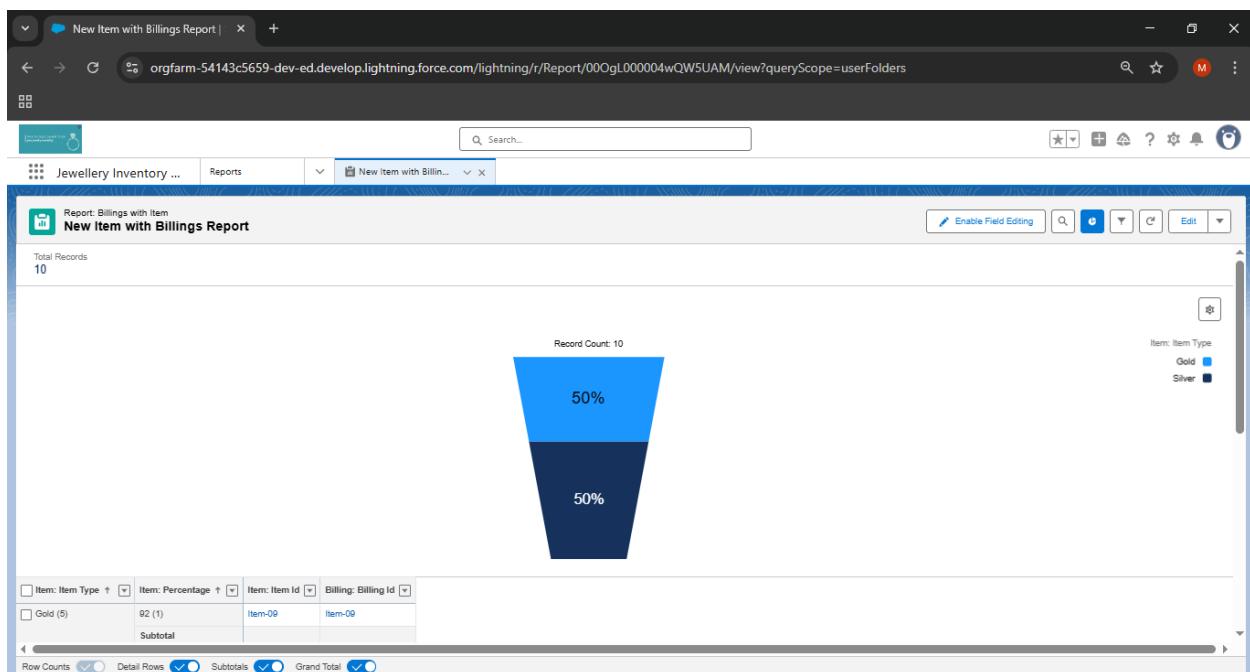
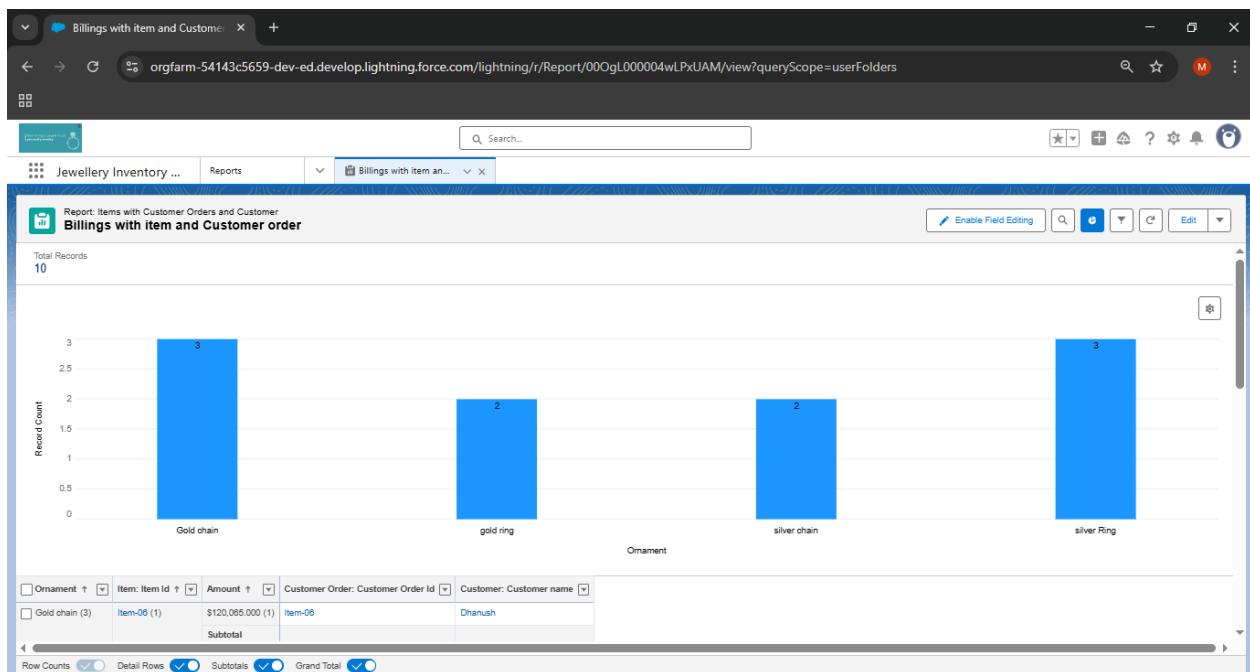
The screenshot shows the Salesforce Reports page. The top navigation bar includes links for 'Recent | Reports | Salesforce' and the current URL 'orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mr'. The main content area displays a table of recent reports. The columns are: Report, Description, F., Created By, Created On, and Subscribed. The reports listed are:

Report	Description	F.	Created By	Created On	Subscribed
New Prices Report	Private Report	MATHANKUMAR G	9/9/2025, 6:08 AM		
Billing with item and Customer order	Private Report	MATHANKUMAR G	9/10/2025, 12:35 AM		
New Item with Billings Report	Private 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', 'All Folders', 'Created by Me', 'Shared with Me', and 'Favorites'.

The screenshot shows the detail view of the 'New Prices Report'. The top navigation bar includes links for 'New Prices Report | Salesforce' and the current URL 'orgfarm-54143c5659-dev-ed.develop.lightning.force.com/lightning/r/Report/00OgL000004unIJUAQ/view?queryScope=userFolders'. The main content area displays the report title 'Report: Prices New Prices Report' and summary statistics: Total Records 10, Total Gold Price \$578,000, and Total Silver Price \$518,000.00000. Below this is a table with columns: Price, Price Id, Gold Price, and Silver Price. The table data is as follows:

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)