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CRM Application for Jewel Management

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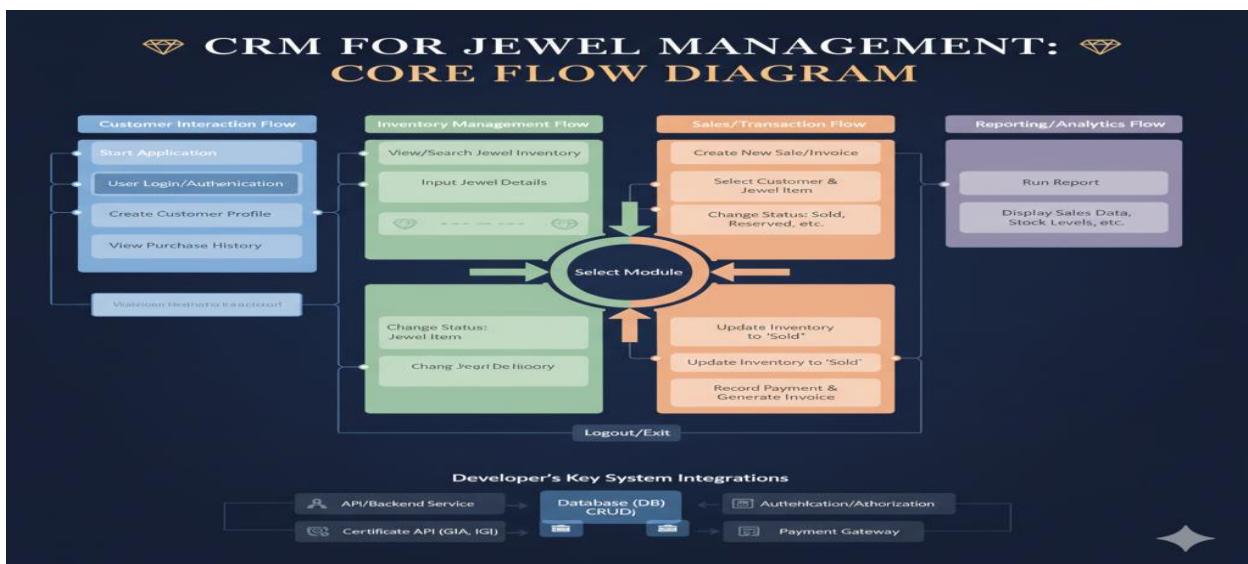
CRM Application for Jewel Management

User Story:

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

What you'll learn:

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



Milestone 1-Salesforce

Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you. Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?".

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

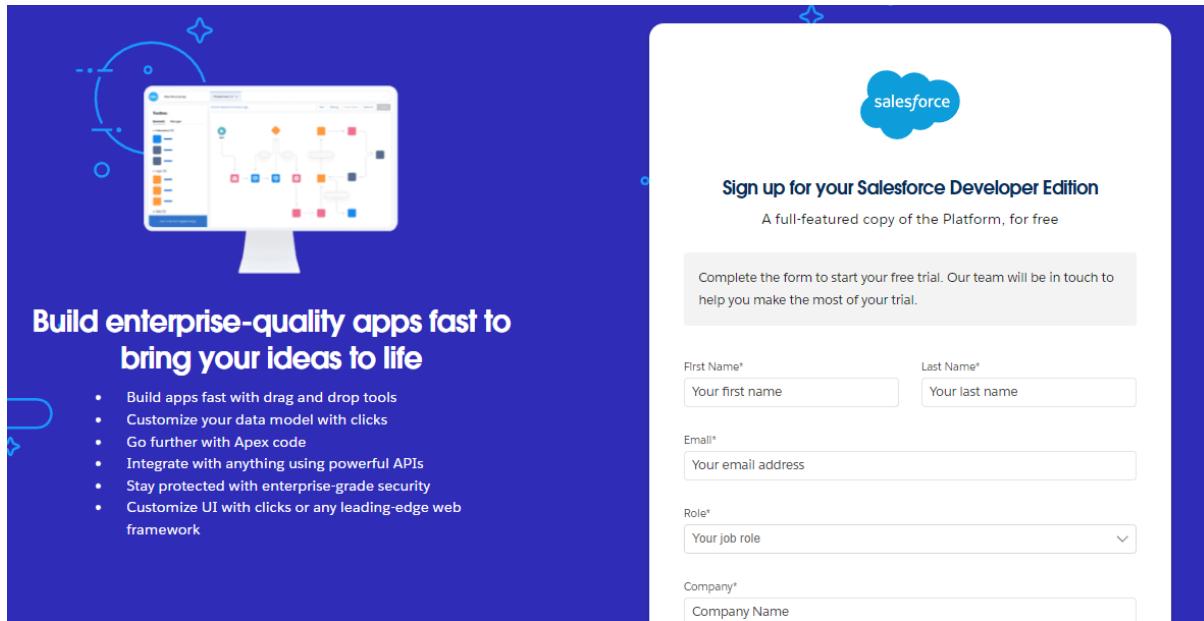
So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organised something like this:

<https://youtu.be/r9EX3IGde5k>

Creating Developer Account

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :



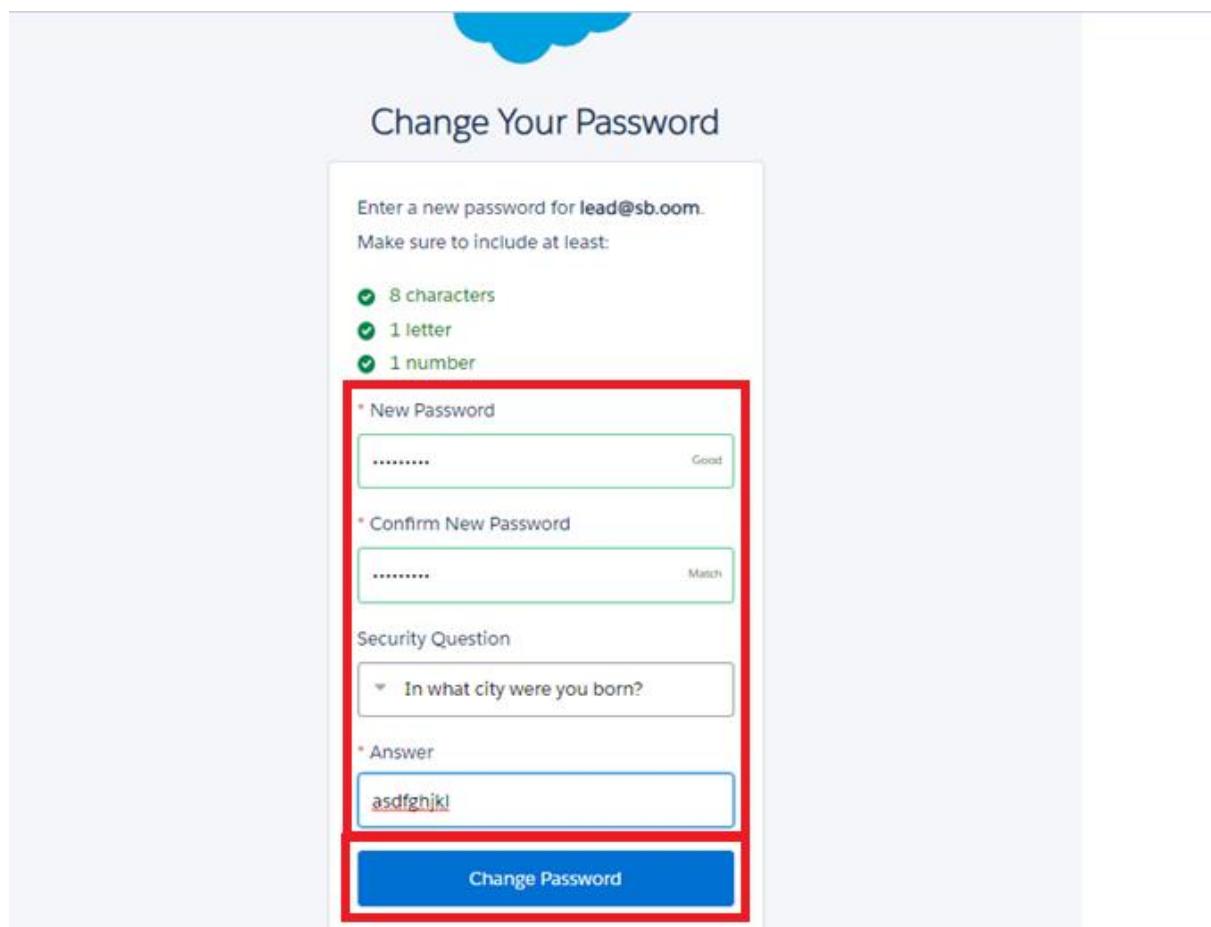
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format
: username@organization.com

Click on sign me up after filling these.

Account Activation

- Go to the inbox of the email that you used while signing up. Click on the Reset Password to activate your account. The email may take 5-10mins.
- Click on Reset Password
- Give a password and answer a security question and click on change password.



The image shows the 'Change Your Password' page in the Salesforce setup interface. At the top, it says 'Change Your Password'. Below that, it asks to enter a new password for 'lead@sb.oom' and lists requirements: '8 characters', '1 letter', and '1 number'. A red box highlights the password input fields and the security question/answer section. The 'Change Password' button is at the bottom.

Enter a new password for lead@sb.oom.
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

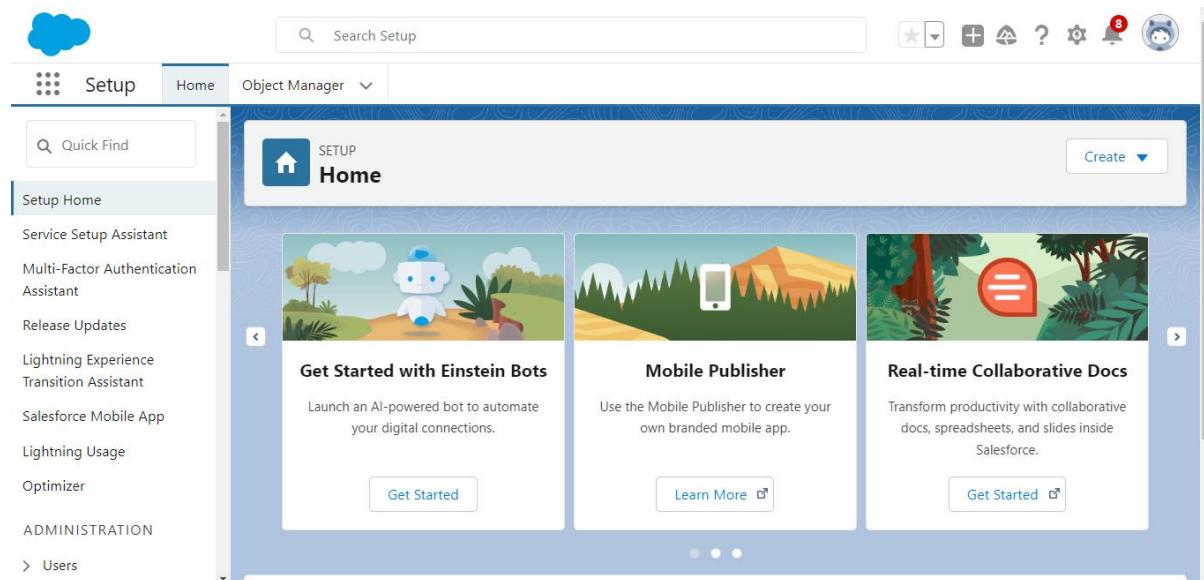
* Confirm New Password
..... Match

Security Question
In what city were you born?

* Answer
asdfghjkl

Change Password

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



The image shows the Salesforce Setup Home page. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (with a 'Users' link). The main content area features three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Each card has a 'Get Started' or 'Learn More' button.

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

> Users

SETUP Home

Get Started with Einstein Bots

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

Get Started

Mobile Publisher

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

Learn More

Real-time Collaborative Docs

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

Get Started

Milestone 2-Object

What Is an Object?

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

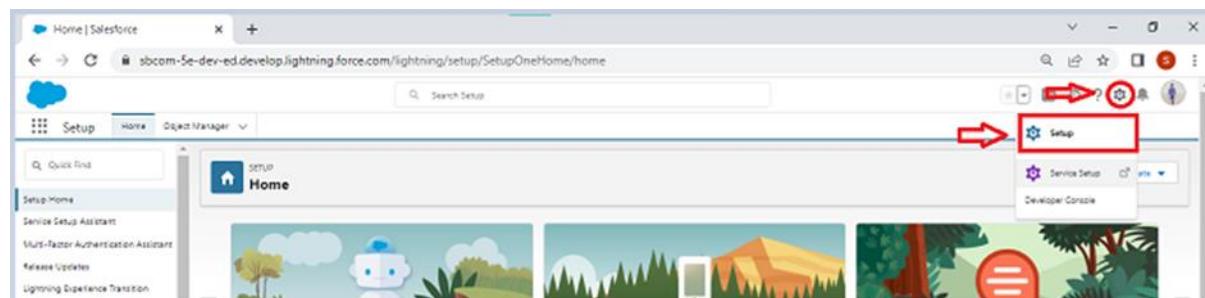
Salesforce objects are of two types:

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

Use Case:

Creating an object in Salesforce organisation is essential for efficient data management and process automation. By defining custom objects, businesses can structure and store data specific to their needs, enabling streamlined workflows, personalized reporting, and enhanced user experiences. Objects serve as the foundation for organizing and leveraging critical information within Salesforce. To Navigate to Setup page:

Click on gear icon >> click setup.



Create Jewel Customer Object:

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

To create an object:

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

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with tabs for 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' tab is currently selected. Below the navigation bar, there's a search bar labeled 'Search Setup' and a 'Quick Find' bar. The main content area is titled 'Object Manager' and shows a table with columns: 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', and 'LAST MODIFIED'. A single row is visible, labeled 'Custom Object' with a note 'Custom Object from Spreadsheet'. In the top right corner of the main content area, there's a 'Create' button with a dropdown menu. The 'Custom Object' option is highlighted with a red circle. A large blue arrow points from the 'Object Manager' tab in the navigation bar down to this 'Create' button.

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

The screenshot shows the 'New Custom Object' page in the Salesforce Setup. The 'Label' field contains 'Customer' and the 'Plural Label' field contains 'Customers'. Both fields are highlighted with a red border and have red arrows pointing to them from the left.

4. Enter Record Name Label and Format

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

Enter Record Name Label and Format

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

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

Optional Features

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

Object Classification

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

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

In Development
 Deployed

[What is this?](#)

- Click on Allow reports.

Create Item Object:

The purpose of creating a Item object is to manage the inventory of gold and silver items.

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
2. Enter the label name >> Item
3. Plural label name >> Items
4. Enter Record Name Label and Format
 - Record Name >> Item Id
 - Data Type >> Auto Number
 - Display Format >> Item-{00}

Click on Allow reports.

2. Allow search >> Save.

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

Milestone 3-Tabs

What is Tab?

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

Types of Tabs:

Custom Tabs:

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

Web Tabs:

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

Visualforce Tabs:

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

Lightning Component Tabs:

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

Lightning Page Tabs:

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

Use Case:

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

Creating a Custom Tab:

To create a Tab:(Customer)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)

Custom Tabs

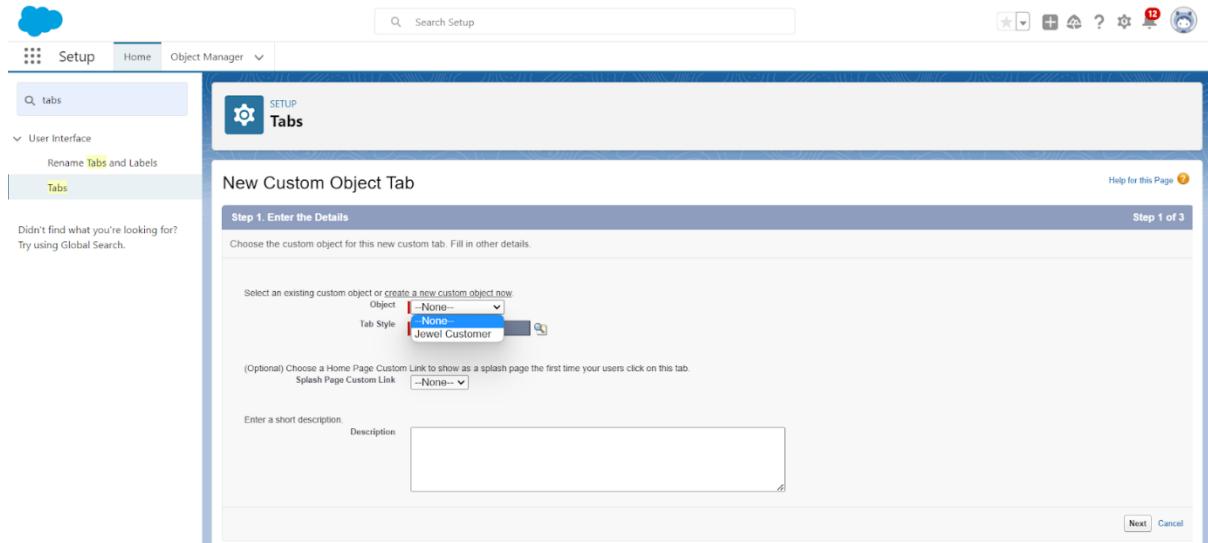
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

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

Custom Object Tabs	New	What Is This?
No Custom Object Tabs have been defined		

Web Tabs	New	What Is This?
No Web Tabs have been defined		

2. Select Object(Jewel Customer) >> Select any tab style >> Next (Add to profiles) keep it as default >> Next (Add to Custom App) keep it as default >> Save.



To create a Tab:(Item)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Item) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) keep it as default >> Save.

Note: Now create tabs for Customer Order, Price, Billing objects.

Milestone 4-The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps gives users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

Use Case:

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

Create a Lightning App:

To create a lightning app page:

- Go to setup page >> search “app manager” in quick find >> select “app manager” >>
- click on New lightning App.

The screenshot shows the Salesforce App Manager interface. At the top, there are three tabs: Setup, Home, and Object Manager. A red box highlights the 'Setup' tab. Below the tabs, there is a search bar with the placeholder 'Search Setup'. Another red box highlights the search bar. To the right of the search bar, there are several buttons: 'New Lightning App' (highlighted with a red arrow), 'New Connected App', and others. A third red box highlights the 'New Lightning App' button. On the left side of the main content area, there are two red boxes: one highlighting the 'Q: app manager' search result and another highlighting the 'App Manager' link below it. The main content area displays a table titled '35 Items > Sorted by App Name > Filtered by All appmanager - TabSetType'. The table has columns for App Name, Developer Name, Description, Last Modified, App Type, and various checkboxes. The first few rows show standard Salesforce apps like 'All Tabs', 'Analytics Studio', 'App Launcher', etc.

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

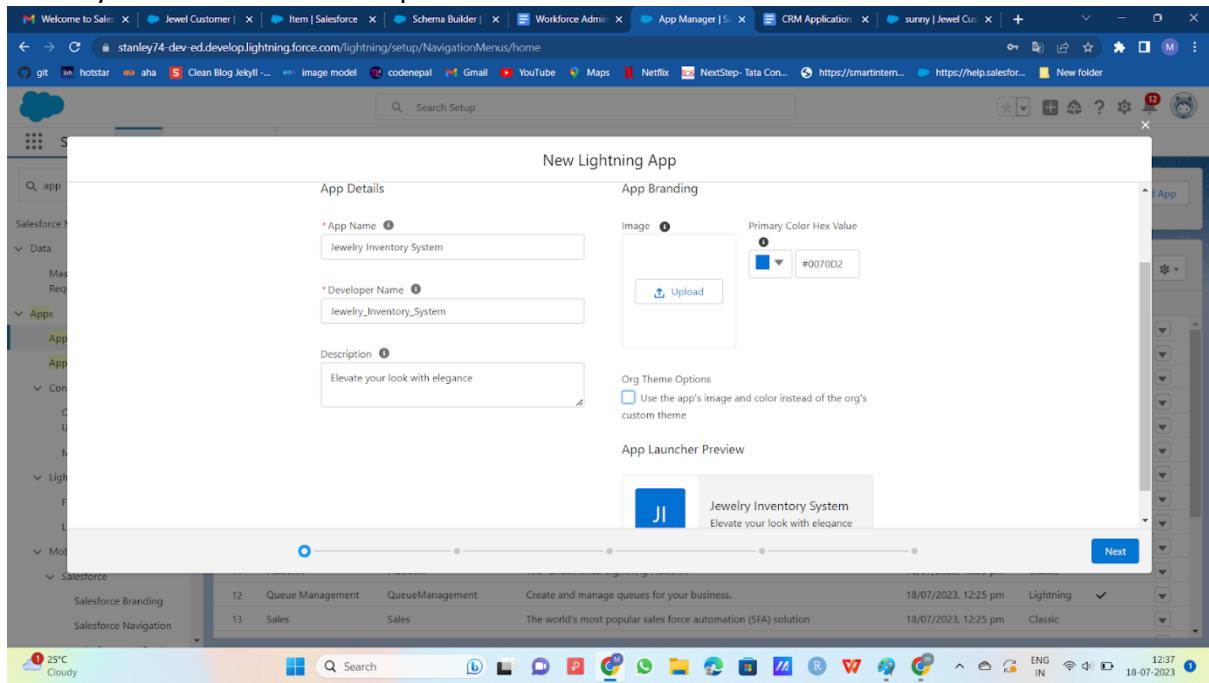
App Name : Jewellery Inventory System.

Developer Name : This will auto populated

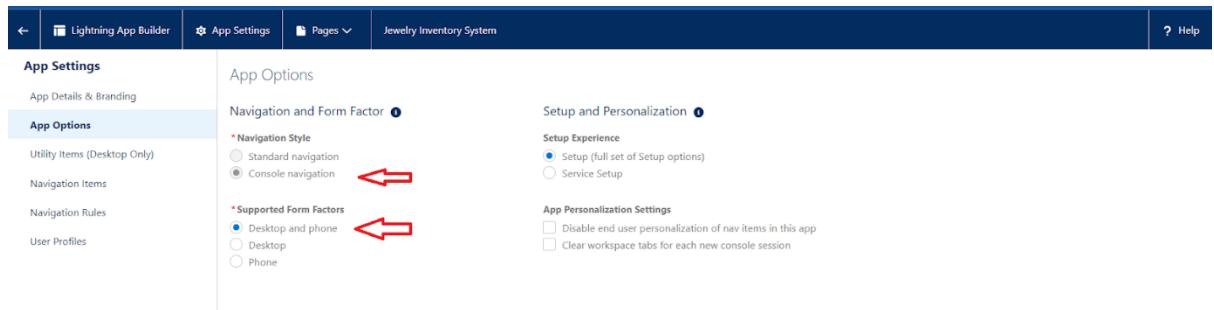
Description : Elevate your look with elegance

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

Primary colour hex value : keep this default.



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



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

➤ To Add Navigation Items:

The screenshot shows the 'Navigation Items' section of the Lightning App Builder. On the left, a sidebar lists 'App Settings' (App Details & Branding, App Options, Utility Items (Desktop Only), Navigation Items (selected), Navigation Rules, User Profiles). The main area has two panels: 'Available Items' (Accounts, Alert Settings, All Sites, Alternative Payment Methods, App Launcher, Appointment Invitations, Approval Requests, Asset Action Sources, Asset Actions, Asset Services) and 'Selected Items' (Jewel Customers, Items, Customer Orders, Prices, Billings, Reports, Dashboards). A search bar at the top of the available items panel contains the placeholder 'Type to filter list...'. A 'Create' button is visible at the top right of the available items panel.

Search for the item in the (JewelCustomer,Item,CustomerOrder,Price,Billing,Reports, Dashboard) from the search bar and move it using the arrow button ? Next? Next.

➤ To Add User Profiles:

The screenshot shows the 'User Profiles' configuration screen. It has two panels: 'Available Profiles' (System administrator) and 'Selected Profiles' (System Administrator). A red box highlights the search bar in the 'Available Profiles' panel, and a red arrow points to the right arrow button between the two panels. A red box highlights the 'Save & Finish' button at the bottom right. The title bar says 'New Lightning App'.

Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

Milestone 5-Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields:

- Standard Fields
- Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

>> Created By
>> Owner
>> Last Modified
>> Field Made During object Creation

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organiser or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

Use Case:

Now it's time for you to think out of the box for your organisation. You have successfully created the database objects for the organisation but now all eyes turn on you as you have to define what sort of information the objects store which you have created. As a life saver of your organisation you come up with the idea of creating fields to store different types of data.

Creating Lookup Relationship:

A Lookup relationship is a type of relationship in Salesforce that connects two objects together based on a field known as the Lookup field. It establishes a relationship between a child object and a parent object, allowing the child object to reference the parent object.

To Create a relationship between Jewel Customer & Customer Order Objects.

1. Go to the setup page >> click on object manager >> type object name(Customer Order) in the quick find bar >> click on the object.
2. Click on fields & relationships >> click on New.
3. Select “Lookup relationship” as data type and click Next.
4. Select the related object “Jewel Customer”.
5. Give Field Label as “Customer” and click Next.
6. Next >> Next >> Save.

Creating a Master-Detail Relationship:

Master-detail relationship is a type of relationship between two objects where the master object controls certain behaviours and settings of the detail object. Here are a few use cases that demonstrate the use of master-detail relationships

Creating Master-Detail Relationship between Item & Customer Order Object.

To Create a Master-Detail relationship :

1. Go to the setup page >> click on object manager >> type object name(Customer Order) in the quick find bar >> click on the object.
2. Click on fields & relationships >> click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. Select the related object “Item”.
5. Give Field Label as “Item” and click Next.
6. Next >> Next >> Save.

Creating Text Field in Jewel Customer Object:

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the

object.

The screenshot shows the Salesforce Object Manager page. At the top, there is a search bar with the placeholder "Search Setup". Below it, a table lists objects. The first object in the table is "jewel Customer", which is highlighted with a red arrow pointing to its label. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED.

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

The screenshot shows the "Fields & Relationships" page for the "Jewel Customer" object. The page title is "Fields & Relationships" with a subtitle "11 Items, Sorted by Field Label". There is a search bar at the top right with a red arrow pointing to it. A red box highlights the "Fields & Relationships" tab in the left sidebar. The main area displays several fields: "Country" (Type: Text(18)), "Created By" (Type: Lookup(User)), and "Customer Name" (Type: Text(80)).

3. Select Data type as “Text”.

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

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

4. Click on Next

The screenshot shows the "Step 2: Enter the details" page for creating a new custom field. The page title is "New Custom Field". The "Field Label" is set to "City" and the "Length" is set to "20". The "Field Name" is automatically generated as "City". A red box highlights the "Field Label" input field.

5. Fill the above as following:

- o Field Label: City
- o Length : 20
- o Field Name : gets auto generated
- o Click on Next >> Next >> Save and new.

Creating the Phone field in object Jewel Customer:

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Phone” and click Next.
4. Given the Field Label as “ Phone”.

The screenshot shows the Salesforce Object Manager interface. The left sidebar has a 'Fields & Relationships' section selected. The main area is titled 'Jewel Customer New Custom Field' and is on 'Step 2 of 4'. It shows the 'Field Label' as 'Phone' and the 'Field Name' as 'Phone'. There are checkboxes for 'Required' (unchecked), 'Always require a value in this field in order to save a record', and 'Auto add to custom report type' (unchecked). A checked box for 'Add this field to existing custom report types that contain this entity' is also present. At the bottom, there are 'Default Value' and 'Show Formula Editor' options.

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

Creating the Email field in object Jewel Customer:

To create fields in an object:

- Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.
- Now click on “Fields & Relationships” >> New
- Select Data type as “Email” and click Next.
- Given the Field Label as “ Email”.
- Field Name will be auto populated, and click on Next >> Next >> Save.

Creating the number field in Item object:

To create fields in an object:

- Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
- Now click on “Fields & Relationships” >> New
- Select Data type as “Number” and click Next.
- Given the Field Label as “ Purity” and length as “ 2 ”.

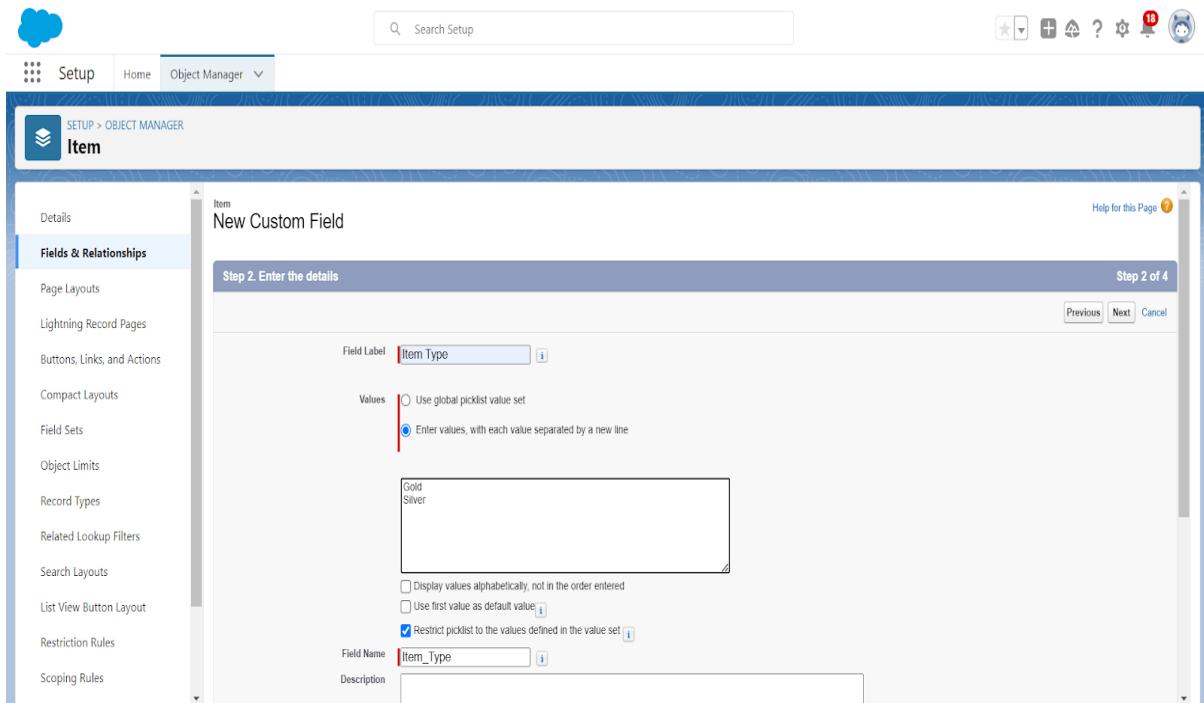


- Field Name will be auto populated, and click on Next >> Next >> Save.

Creating Picklist Field in Item Object:

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar>> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select Data type as “Picklist” and click Next.
4. Enter Field Label as “Item Type”.
5. In values select “Enter values(Gold,Silver), with each value separated by a new line” and enter values as shown below.

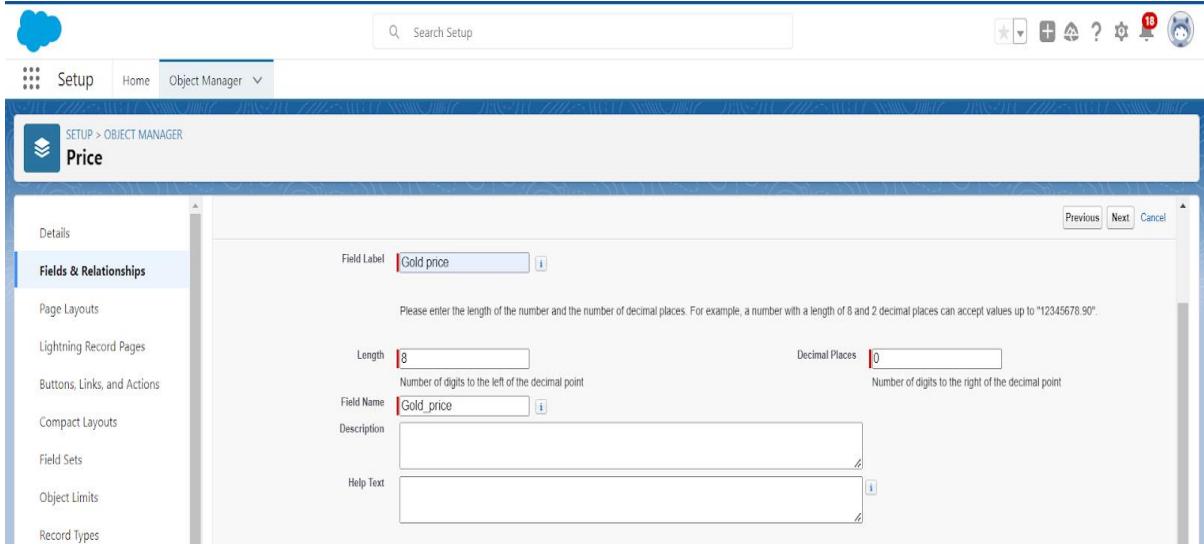


6. Click Next? Next? Next? Save.

Creating Currency Field in Price Object:

To create fields in an object:

- Go to setup >> click on Object Manager >> type object name(Price) in quick find bar >> click on the object.
- Now click on “Fields & Relationships” >> New.
- Select Data type as “Currency” and click Next.



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

Creating Formula Field (Cross Object) in Item Object:

- To create fields in an object:
- (Note:Create a Lookup Relationship in Item Object to Price Object with Field Name:Prices)
- Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
- Now click on “Fields & Relationships” >> New.
- Select Data type as “Formula” and click Next.

Give Field Label and Field Name as “Gold Price” and select formula return type as “Currency” and click next.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various object types like Page Layouts, Lightning Record Pages, etc. The main area is titled 'Item New Custom Field' and is on 'Step 2. Choose output type'. The 'Field Label' is set to 'Gold price' and the 'Field Name' is 'Gold_price'. Under 'Formula Return Type', 'None Selected' is chosen. A list of other options is provided: Checkbox (Calculate a boolean value), Currency (Calculate a dollar or other currency amount and automatically format the field as a currency amount), Date (Calculate a date, for example, by adding or subtracting days to other dates), Date/Time (Calculate a date/time, for example, by adding a number of hours or days to another date/time), and Number (Calculate a numeric value). A note at the bottom says 'and automatically add the percent sign to the number'.

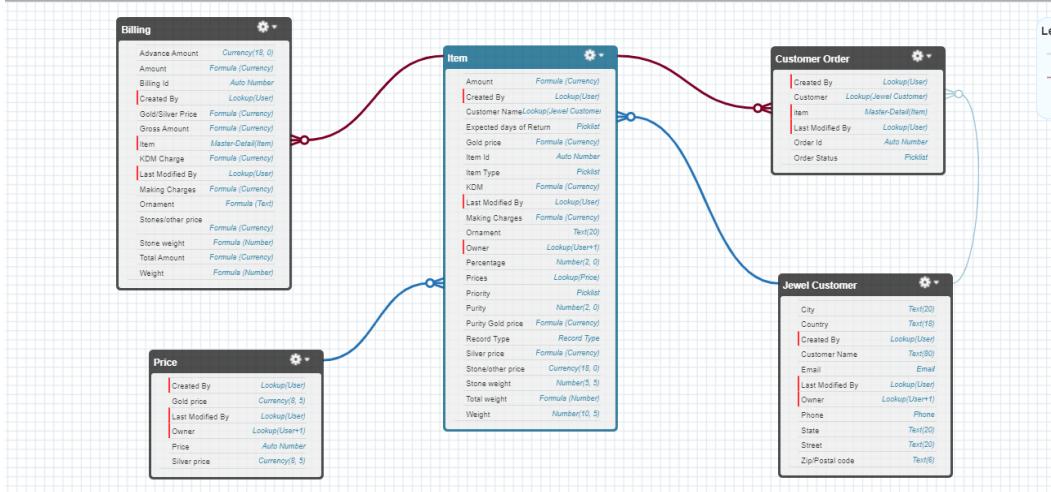
Under Advanced Formula write down the formula :Prices__r.Gold_price__c / 10.

The screenshot shows the 'Advanced Formula' subtab within the 'Item' setup page. The formula entered is 'Prices__r.Gold_price__c / 10'. The formula editor includes tabs for 'Simple Formula' and 'Advanced Formula', an 'Insert Field' button, an 'Insert Operator' dropdown, and a 'Functions' sidebar with categories like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. A note at the top says 'Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.' Examples shown include Gross Margin = Amount - Cost__c and Fahrenheit = 1.8 * Celsius__c + 32.

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

Schema Builder:

Schema Builder is a powerful tool within Salesforce that allows you to visualise, explore, and design the relationships between objects in your Salesforce organisation. It provides a graphical representation of the data model, making it easier to understand the structure and connections between different objects.



Creating the Field Dependencies:

Use case:

Field Dependencies are used to create relationships between fields within an object. They allow you to control the visibility and availability of fields based on the values selected in other fields.

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar >> click on the object.
2. Click on Fields & Relationships and click on the Priority field.
3. Search for Field Dependencies and click on New.

The screenshot shows the Salesforce Object Manager interface for the **Item** object. The page includes the following sections:

- Details**: Shows the object name **Item**, API name **Priority**, and priority level **Priority__c**.
- Fields & Relationships**: A sidebar with various configuration options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules.
- Field Information**: Displays the field's label, name, API name, description, help text, data owner, field usage, data sensitivity level, compliance categorization, and creation details (by meghana.katoju, 7/1/2023, 10:55 PM).
- General Options**: Includes options for Required (unchecked), Default Value, and Picklist Options.
- Picklist Options**: Includes options for Restrict picklist to the values defined in the value set (checked), Controlling Field (set to [None]), and Picklist Values Used (Active and inactive picklist values: 4 (1,000 max)).
- Field Dependencies**: A section where new dependencies can be created, indicated by a red box and a red arrow pointing to the "New" button.
- Help**: A link at the bottom right.

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

New Field Dependency

Create a dependent relationship that causes the values in a picklist or multi-select picklist to be dynamically filtered based on the value selected by the user in another field.

- The field that drives filtering is called the “controlling field.” Standard and custom checkboxes and picklists with at least one and less than 300 values can be controlling fields.
- The field that has its values filtered is called the “dependent field.” Custom picklists and multi-select picklists can be dependent fields.

Step 1. Select a controlling field and a dependent field. Click Continue when finished.

Step 2. On the following page, edit the filter rules that control the values that appear in the dependent field for each value in the controlling field.

	Continue	Cancel
Controlling Field	—None—	
Dependent Field	—None—	
	Continue	Cancel

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

Creating the validation rule:

Creating the validation rule for Postal Code field in Jewel Customer object

Note : check whether the fields mentioned in the formula field are created or not , if not go to activity 10 and create those fields mentioned in Jewel Customer object.

1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar>> click on the object.
2. Click on the validation rule >> click New.

The screenshot shows the Salesforce Object Manager interface for the 'Jewel Customer' object. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Validation Rules' and shows a table with one column: 'RULE NAME'. A red box highlights the 'New' button at the top right of the table.

3. Enter the Rule name as “Postal Code ”.
4. Insert the Error Condition Formula as :-

AND(

OR(

LEN(Zip_Postal_code__c) <> 6, NOT(REGEX(Zip_Postal_code__c, "[0-9]{6}")),
NOT(ISBLANK(Zip_Postal_code__c))

)

)

The screenshot shows the 'Validation Rule Edit' screen for the 'Postal Code' rule. The 'Rule Name' is set to 'Postal Code', and the 'Active' checkbox is checked. The 'Error Condition Formula' field contains the formula from the previous steps. The 'Error Message' field is set to 'Must contain 6 digits'. The 'Save' and 'Save & New' buttons are visible at the bottom.

5. Enter the Error Message as “Must contain 6 digits”, select the Error location as Field and select the field as “Zip/Postal code”, and click Save.

NOTE:

Create One more Validation rule for Jewel Customer object.

1. Enter Rule name as “ValidationRule For JewelCustomerObject ”.
2. Insert the Error Condition Formula as : -
OR(ISBLANK(City__c), ISBLANK(Country__c),ISBLANK(Phone__c),ISBLANK(State__c),ISBLANK(Street__c))
3. Enter the Error Message as “Please fill Required fields”, select the Error location as Top of Page and click Save.

Create Validation rule for Item object.

1. Enter Rule name as “ValidationRule For Item”.
2. Insert the Error Condition Formula as : -
OR(ISBLANK(Amount__c), ISBLANK(Customer_Name__c),ISBLANK(Gold_price__c),ISBLANK(KDM__c),ISBLANK(Ornament__c),ISBLANK(Percentage__c),ISBLANK(Making_Charges__c),ISBLANK(Prices__c),ISBLANK(Stone_weight__c),ISBLANK(Silver_price__c),ISBLANK(Stone_other_price__c),ISBLANK(Stone_weight__c),ISBLANK(Weight__c))
3. Enter the Error Message as “Please fill Required fields”, select the Error location as Top of Page and click Save.

Milestone 6-Profiles

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce:

Standard profiles:

By default salesforce provides below standard profiles.

- Contract Manager

Read Only

- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

We cannot deleted standard ones

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

Custom Profiles:

- Custom ones defined by us.
- They can be deleted if there are no users assigned with that particular one.

Use Case:

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

Milestone 7-Roles

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organisation can have to data. Simply put, it describes what a user could see within the Salesforce organisation.

Use Case:

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

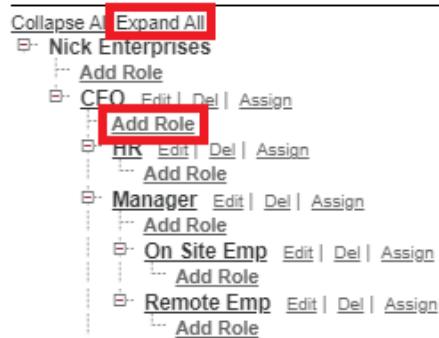
Creating Gold Smith Role:

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

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar contains 'roles'. The left sidebar has a tree view with 'Users' expanded, showing 'Roles' which is also highlighted with a red box. Other collapsed categories include 'Feature Settings', 'Service', 'Case Teams', and 'Contact Roles on Cases'. The main content area is titled 'Understanding Roles' and contains a sample role hierarchy diagram. At the bottom right of the main content area is a red box around the 'Set Up Roles' button.

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

Your Organization's Role Hierarchy



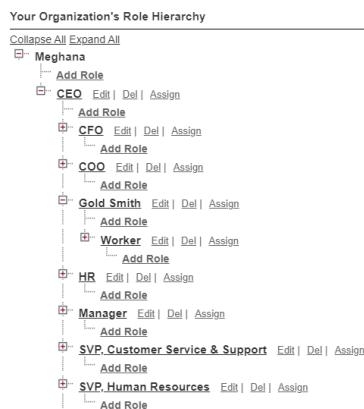
3. Give Label as "Gold Smith" and Role name gets auto populated. Check to whom this role (Gold Smith) reports. Then click on Save.

The screenshot shows the Salesforce Setup Roles page. On the left, there is a sidebar with navigation links like Setup, Home, Object Manager, and a search bar. The main area has a title 'SETUP Roles'. Below it, a sub-section titled 'Role Edit' shows a role named 'Gold Smith'. The 'Label' field contains 'Gold Smith', and the 'Role Name' field contains 'Gold_Smith'. A dropdown menu 'This role reports to' is set to 'CEO'. At the bottom, there are buttons for 'Save', 'Save & New', and 'Cancel'.

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

Creating the Role Hierarchy

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



Milestone 8-Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access. Each user account contains at least the following:

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

Create User:

1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
 1. First Name : Niklaus
 2. Last Name : Mikaelson
 3. Alias : Give a Alias Name
 4. Email id : Give your Personal Email id
 5. Username : Username should be in this form: text@text.text
 6. Nick Name : Give a Nickname
 7. Role : Gold Smith
 8. User licence : Salesforce

9. Profiles : Gold Smith

The screenshot shows the Salesforce Setup interface under the 'Users' section. On the left, there's a sidebar with options like 'Permission Set Groups', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. The main area is titled 'User Edit' for 'Niklaus Mikaelson'. It has tabs for 'General Information', 'Custom Object Permissions', 'Object Permissions', 'Email Address', 'Phone Number', 'Address', 'File Attachments', and 'Notes & Attachments'. Under 'General Information', fields include First Name ('Niklaus'), Last Name ('Mikaelson'), Alias ('nmika'), Email ('nadeem@thesmartbridge.co'), Username ('nicklaus@ack.org'), Nickname ('nicklaus'), Title (''), Company (''), Department (''), and Division (''). On the right, there are sections for 'Role' (set to 'Gold Smith'), 'User License' (set to 'Salesforce Platform'), 'Profile' (set to 'Salesforce Platform'), and 'Active' (checkbox checked). Below these are various user-related checkboxes and settings like 'Marketing User', 'Office User', etc.

1. Save.

Create User:

1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
 - First Name : Kol
 - Last Name : Mikaelson
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: text@text.text
 - Nick Name : Give a Nickname
 - Role : Worker
 - User licence : Salesforce Platform
 - Profiles : Worker
3. Save.

Note:

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

Milestone 9-Page layouts

Page Layout in Salesforce allows us to customise the design and organise detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

Use Case:

Hurray!! you have completed the data model structure for your organisation but while looking at the detailed and edit pages it seems to be so clumsy, so decide to organise the page in a

pleasant way for the sake of good and pleasant appearance and assemble all different kinds of information in different sections in order.

To Create a Gold Page layout:

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

The screenshot shows the Salesforce Object Manager for the 'Item' object. The 'Page Layouts' tab is selected. A table lists one item layout. At the top right, there are 'Quick Find', 'New', and 'Page Layout Assignment' buttons. The 'New' button is highlighted with a red box.

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

The screenshot shows the 'Create New Page Layout' dialog. It has a note about cloning existing layouts. Below it, there's a dropdown for 'Existing Page Layout' set to 'Item Layout' and a text input for 'Page Layout Name' containing 'Page Layout for Gold'. The 'Save' and 'Cancel' buttons are at the bottom.

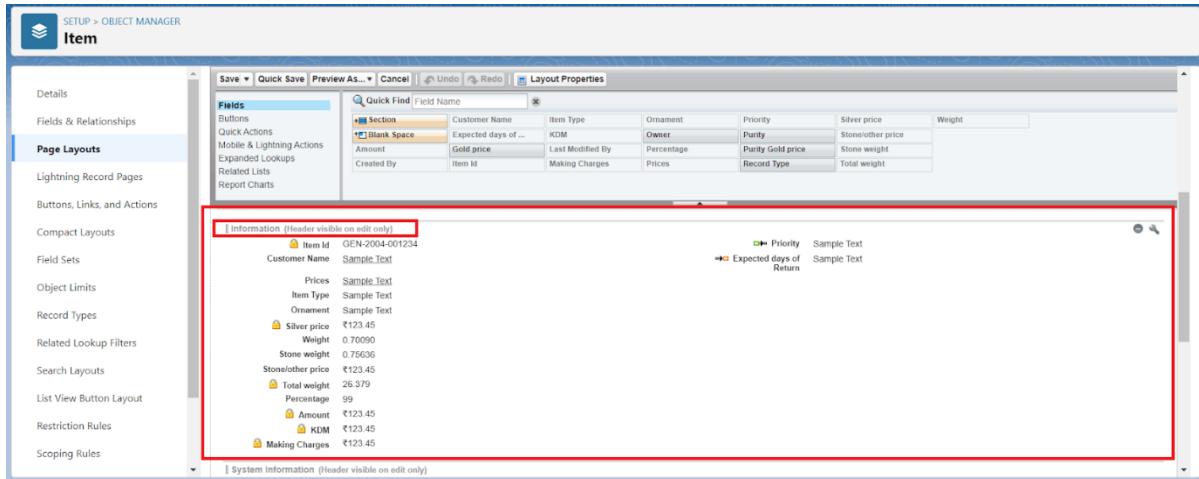
4. Arrange the field as shown in the Information Section ,remove fields which are related to Silver and click Ok.

The screenshot shows the 'Edit Page Layout' dialog. In the 'Fields' section, a table lists various fields like Item Id, Customer Name, etc. One row for 'Purity' is highlighted with a yellow box. A tooltip says 'This item is currently in use (click to locate)'. Below the table, a list of fields is shown, with 'Purity' also highlighted with a blue selection bar. A red box highlights the 'Information' header in the list.

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

To Create a Silver Page layout:

1. Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.
2. Click on Page layout >> Click on New.
3. Give Page layout Name as “Page Layout for Silver” and click on Save.
4. Arrange the field as shown in the Information Section ,remove fields which are related to Gold and click Ok.



Milestone 10-Record Types

Record Types are a way of grouping many records of one type for that object. These can be applied to any standard or custom object, and allow you to have a different page layout, fields, required fields, and picklist values. Record types allow administrators to create a different page layout with custom picklist fields and values for the same business process and various business processes.

Use Case:

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

To create a Record Type:

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
2. Click on the Record Types >> click New.

The screenshot shows the Salesforce Object Manager for the 'Item' object. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The 'Record Types' item is highlighted with a red box and a red arrow points to it from the left. The main content area displays a table titled 'Record Types' with two items: 'Gold' and 'Silver'. The 'Gold' record has a description of 'Gold items information' and was modified by 'meghana katoju' on 7/18/2023, 11:45 AM. The 'Silver' record has a similar description and modification details.

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

The screenshot shows the 'Edit Record Type' page for the 'Gold' record. The page title is 'Edit Record Type Gold'. It prompts the user to enter a new name for the selected record type and click Save. The form fields include 'Record Type Label' (set to 'Gold'), 'Record Type Name' (set to 'Gold'), 'Namespace Prefix' (empty), 'Description' (set to 'Gold items information'), and an 'Active' checkbox which is checked. A red box highlights the entire edit form area.

4. Uncheck for “Make Available”.

The screenshot shows the 'Profile Settings' page. It lists several profiles on the left: Analytics Cloud Integration User, Analytics Cloud Security User, Chatter External User, and Chatter Free User. To the right, there's a table titled 'Record Types Currently Available' with columns for 'Profile Name', 'Record Types Currently Available', 'Make Available' (checkbox), and 'Make Default' (checkbox). For each profile, there are four rows corresponding to the record types. The 'Make Available' checkboxes are currently checked for all rows. A red box highlights the 'Make Available' column header.

5. Scroll down and check for the Gold Smith,Worker JW & System Administrator profile and click on Next.

Record Type	Description	Status
Customer Portal Manager Standard		<input type="checkbox"/>
External Apps Login User		<input type="checkbox"/>
External Identity User		<input type="checkbox"/>
Force.com - App Subscription User	Gold (Default) ,Silver	<input type="checkbox"/>
Force.com - Free User	Gold (Default) ,Silver	<input type="checkbox"/>
Gold Partner User	Gold (Default) ,Silver	<input type="checkbox"/>
Gold smith	Gold (Default) ,Silver	<input checked="" type="checkbox"/>
High Volume Customer Portal		<input type="checkbox"/>
High Volume Customer Portal User		<input type="checkbox"/>
HR	Gold (Default) ,Silver	<input type="checkbox"/>
HR Recruiter	Gold (Default) ,Silver	<input type="checkbox"/>
Identity User	Gold (Default) ,Silver	<input type="checkbox"/>
J Worker1	Gold (Default) ,Silver	<input checked="" type="checkbox"/>
J Worker2	Gold (Default) ,Silver	<input checked="" type="checkbox"/>
J WORKER3	Gold (Default) ,Silver	<input checked="" type="checkbox"/>
Manager	Gold (Default) ,Silver	<input type="checkbox"/>
Marketing User	Gold (Default) ,Silver	<input type="checkbox"/>
Minimum Access - Salesforce	Gold (Default) ,Silver	<input type="checkbox"/>
Partner App Subscription User		<input type="checkbox"/>
Partner Community Login User		<input type="checkbox"/>
Partner Community User		<input type="checkbox"/>
Read Only		<input type="checkbox"/>
s1		<input type="checkbox"/>
Salesforce API Only System Integrations		<input type="checkbox"/>
Sales User		<input type="checkbox"/>
Sales User.		<input type="checkbox"/>
Silver Partner User		<input type="checkbox"/>
Solution Manager		<input type="checkbox"/>
Standard Platform User		<input type="checkbox"/>
Standard User		<input type="checkbox"/>

6. Select “Apply a different layout for each profile”, and change page layout to “Page Layout for Gold”for Gold Smith,Worker and System Administrator ? save & new.

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

HR	Item Layout
HR Recruiter	Item Layout
Identity User	Item Layout
Manager	Item Layout
Marketing User	Item Layout
Minimum Access - Salesforce	Item Layout
Partner App Subscription User	Item Layout
Partner Community Login User	Item Layout
Partner Community User	Item Layout
Read Only	Item Layout
s1	Item Layout
Salesforce API Only System Integrations	Item Layout
Sales User	Item Layout
Sales User.	Item Layout
Silver Partner User	Item Layout
Solution Manager	Item Layout
Standard Platform User	Item Layout
Standard User	Item Layout
Support User	Item Layout
Support User.	Item Layout
System Administrator	Item Layout
Work.com Only User	Item Layout
Worker	Page layout for Gold

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

Note: Use page layout for Silver.

Milestone 11-Permission sets

A standard permission set consists of a group of common permissions for a particular feature associated with a permission set licence. Using a standard permission set saves you time and facilitates administration because you don't need to create the custom permission set.

Creating permission set:

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets.

Go to setup >> type “permission sets” in quick search >> select permission sets >> New.

The screenshot shows the Salesforce Setup Home page. The 'Home' tab is selected. In the sidebar, 'Permission sets' is highlighted with a red box. Under 'Users', 'Permission Sets' is also highlighted with a red box. The main content area is titled 'Permission Sets' and contains a table of existing permission sets like 'Buyer', 'Buyer Manager', 'CRM User', etc. A 'New' button is visible at the top left of the table.

- Enter the label name as "Per to Worker", API will be auto populated ? save.

The screenshot shows the 'Clone: Per to Worker' permission set creation screen. It has fields for 'Label' (Per to Worker) and 'API Name' (Per_to_Worker), both highlighted with red boxes. The 'Save' button at the bottom is also highlighted with a red box.

- Under Apps Select object settings.

The screenshot shows the 'Object Settings' section under 'Apps'. This section is highlighted with a red box. Other sections like 'Assigned Apps', 'Assigned Connected Apps', 'App Permissions', etc., are also listed below it.

- Click on Items object ? click on Edit ? under Item:Record Type Assignments,enable Gold,Silver ? Object permission check for read ,edit and create.

SETUP

Permission Sets

Permission Set Overview > Object Settings **Items**

Items **Save** **Cancel**

Tab Settings

Available	Visible
<input checked="" type="checkbox"/>	<input type="checkbox"/>

Item: Record Type Assignments

Record Types	Assigned Record Types
Gold	<input checked="" type="checkbox"/>
Silver	<input checked="" type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

4. Click on Save.
5. After saving the permission click on the Manage assignment
6. Now click on the Add Assignment.

Current Assignments

Add Assignment

... > PERMISSION SET 'PER TO WORKER' > MANAGE ASSIGNMENT EXPIRATION

Per to Worker

Select Users to Assign

All Users

9 items • Sorted by Full Name • Filtered by All users • Updated a few seconds ago

Full Name ↑	Alias ↓	Username	Role	Action	Profile
Chatter Expert	Chatter	chatty.00d5i000003ksyzea4.t4i5wtjeybt4@chatter.salesforce.com	<input checked="" type="checkbox"/>	Chatter Free User	
Integration User	integ	integration@00d5i000003ksyzea4.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration User	
Mani deepak	mdeep	manideepak143@gmail.com	<input checked="" type="checkbox"/>	Worker	Worker
Megha Katoju Site Guest User	guest	megha_katoju@00d5i000003ksyzea4.org.force.com	<input checked="" type="checkbox"/>	Megha Katoju Profile	
Meghana Katoj Site Guest User	guest	meghana_katoj@00d5i000003ksyzea4.org.force.com	<input checked="" type="checkbox"/>	Meghana Katoj Profile	

Add Assignment

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

Full Name	Role	Profile	Active	User License	Expires On
Mani deepak	Worker	Worker	✓	Salesforce Platform	Never Expires

Milestone 12-Trigger

Use Case:

Trigger and Trigger handler is designed to handle scenarios where we used to update the "Paid Amount" field on a custom object called "Billing" based on the value in a field named "Paying Amount" during both record insertion and update operations. It Calculates and updates the "Paid Amount" field based on the existing "Paid Amount" and the new "Paying Amount" during record updates. This approach ensures that the "Paid Amount" accurately reflects the payments made by customers and provides a history of changes to the "Paid Amount" over time.

Trigger:

A trigger is a piece of Apex code that automatically runs before or after specific events, like record insertion, update, or deletion. Triggers are used to customise and automate actions in response to these events.

Create a Trigger Handler class:

Trigger handler:

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

CODE:

```
public class UpdatePaidAmountTriggerHandler {
    public static void handleBeforeInsert(List<Billing__c> newBillings) {
```

```

        for (Billing__c billing : newBillings) {
            billing.Paid_Amount__c = billing.Paying_Amount__c;
        }
    }

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

```

Create the trigger:

CODE:

```

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

```

Milestone 13-User Adoption

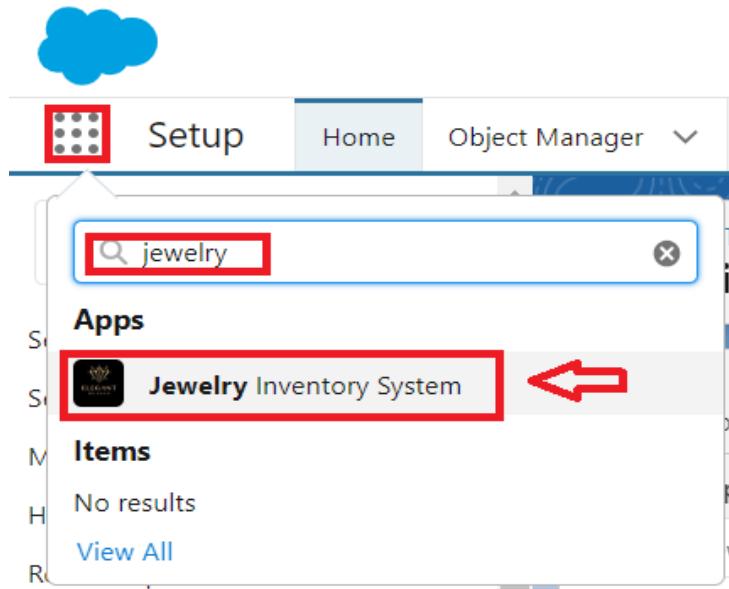
Use Case:

As a new Administrator, you perform user management tasks like creating and editing users, resetting passwords, granting permissions, configuring data access, and much more. In this unit, you will learn about users and how you add users to your Salesforce org.

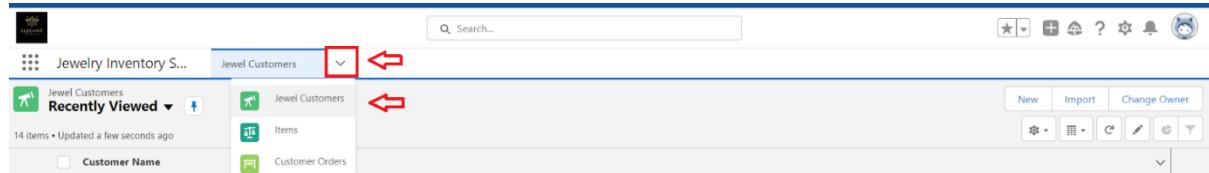
Create a Record (Jewel Customer):

1. Click on App Launcher on the left side of the screen.

2. Search Jewelry Inventory System & click on it.



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



5. Fill the Details and click on Save.

View a Record(Jewel Customer):

- Click on App Launcher on the left side of the screen.
- Search Jewelry Inventory System & click on it.
- Click on the Jewel Customer Tab.
- Click on any record name. you can see the details of the Jewel Customer.

Delete a Record(Jewel Customer):

- Click on App Launcher on the left side of the screen.
- Search Jewelry Inventory System & click on it.
- Click on the Jewel Customer Tab.
- Click on Arrow at right hand side on that Particular record.
- Click delete.

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

Milestone 14-Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce:

- Tabular
- Summary
- Matrix
- Joined Reports

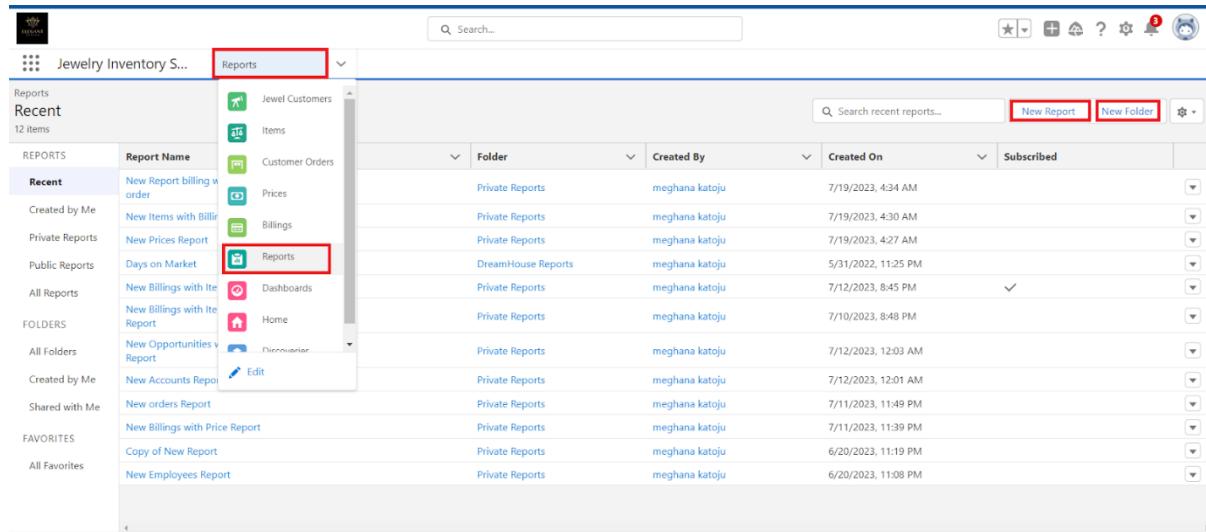
Use Case:

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

Let's create a Report.

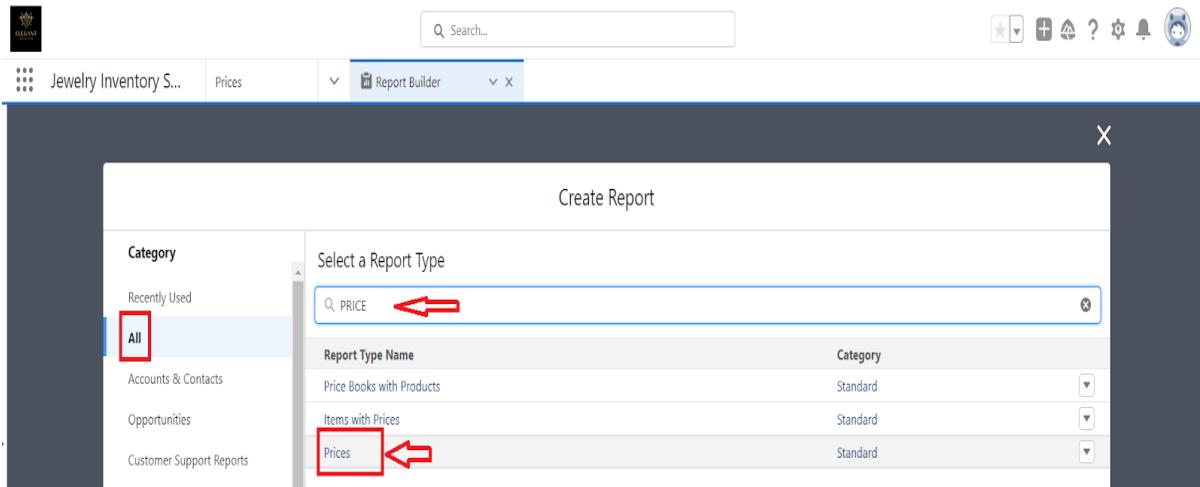
Create Report:

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



The screenshot shows the Salesforce Reports page for the 'Jewelry Inventory S...' app. The left sidebar has sections for Reports, Recent, Reports (Recent), Created by Me, Private Reports, Public Reports, All Reports, Folders, All Folders, Created by Me, Shared with Me, Favorites, and All Favorites. The main area shows a list of reports with columns for Folder, Created By, Created On, and Subscribed. A search bar at the top right has 'New Report' and 'New Folder' buttons highlighted with red boxes. A context menu is open over a report titled 'Days on Market', with options like 'Edit' highlighted.

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



4. Customise your report

Add fields from the left pane as shown below. Save or run it

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

Reports:

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

Milestone 15-Dashboards

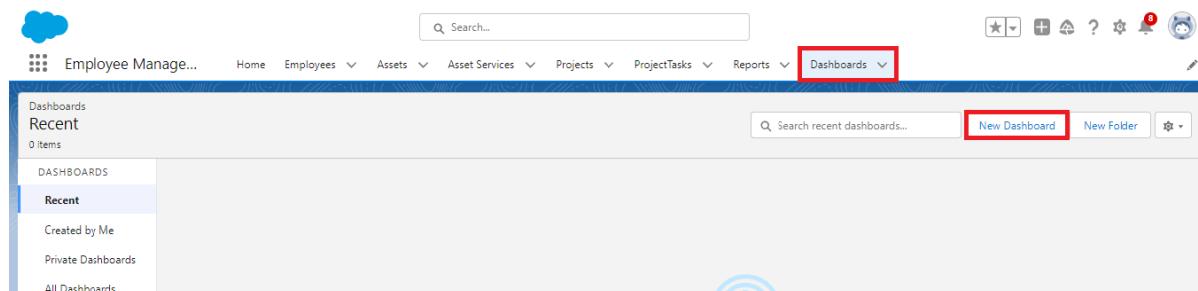
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing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

Use Case:

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

Create Dashboard:

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



2. Give a Name and click on Create.

A screenshot of the 'New Dashboard' creation dialog. The title bar says 'New Dashboard'. There are three input fields: 'Name' (containing 'Dashboard 1'), 'Description' (an empty text area), and 'Folder' (containing 'Private Dashboards'). To the right of the 'Folder' field is a 'Select Folder' button. At the bottom right of the dialog are two buttons: 'Cancel' and 'Create', with 'Create' also having a red box around it.

3. Select add component.

4. Select a Report and click on select.

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

Activity 2: Create another Dashboard as we discussed in activity 1.

Milestone 16-Flows

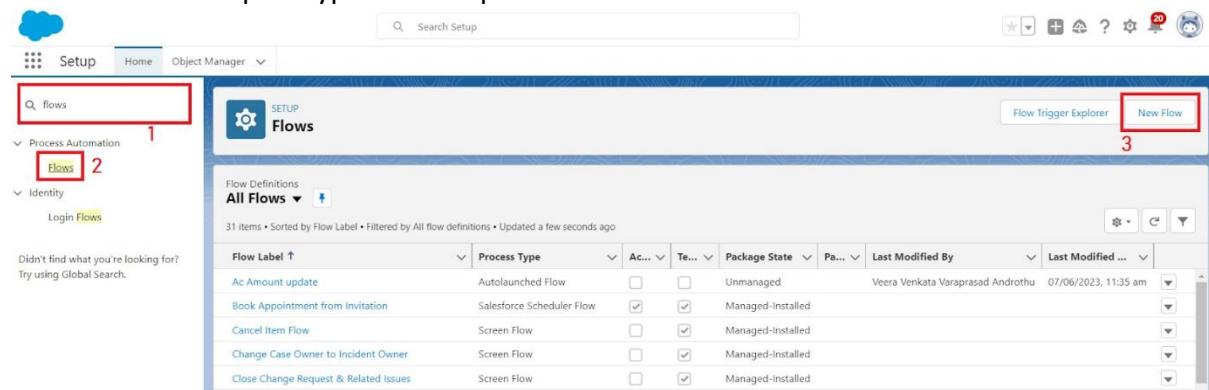
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Use Case:

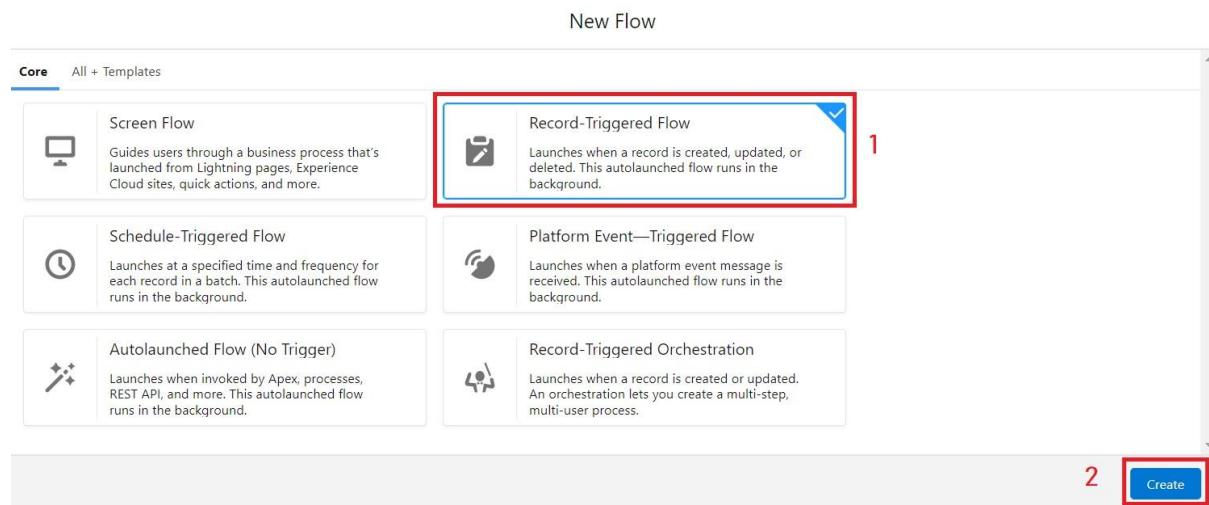
Flows, also known as Salesforce Flows or Visual Flows, are powerful declarative automation tools in Salesforce that allow users to create and manage complex business processes without the need for code. Flows are designed using a drag-and-drop interface, making them easy to use for both administrators and developers. They can be used for various automation tasks like email triggers including data entry, record updates, and guided user interactions.

Create a Flow:

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



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



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

Configure Start

Select Object

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

* Object
Item

Configure Trigger

* Trigger the Flow When:

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

Set Entry Conditions

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

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

Condition Requirements

Cancel Done

6. Now change the mode from Auto-layout to free-form.
7. Now select the manger option in the toolbox, click New resource.
8. Select the resource type as text template.

Flow Builder Email - V5

Configure Start

Save As Save

Select Object

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

* Object
Billing

Configure Trigger

* Trigger the Flow When:

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

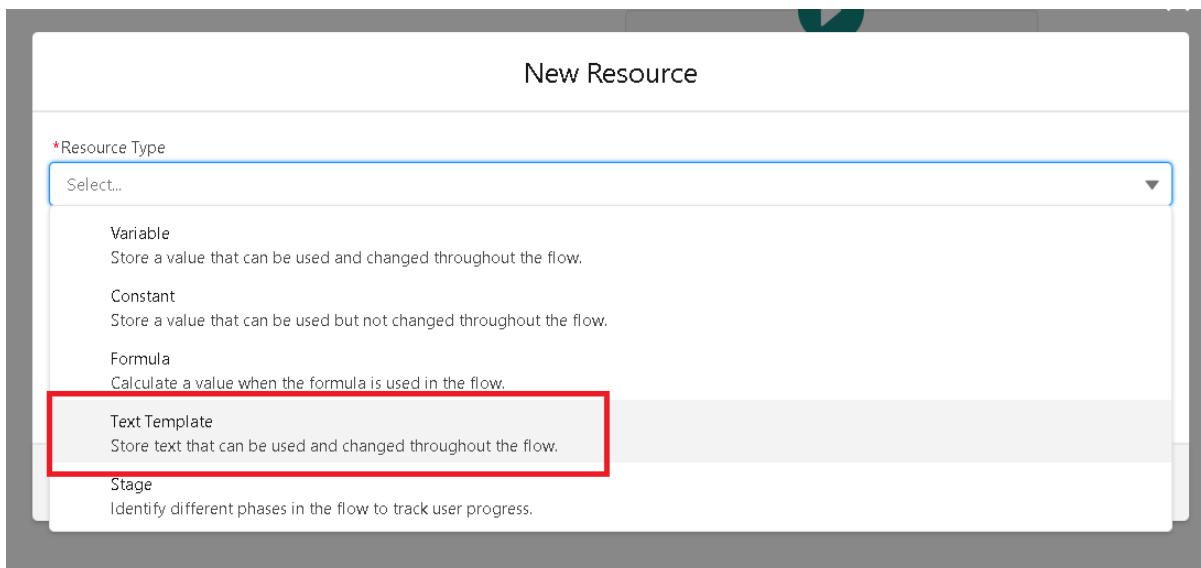
Set Entry Conditions

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

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

Condition Requirements

Cancel Done



9. Enter the API name as "Email body".

The screenshot shows the 'Edit Text Template' dialog box. The 'API Name' field contains 'EmailBody' and is highlighted with a red box. The 'Description' field is empty. The 'Body' section contains the following text:
Hello
Customer Name: {!\$Record.Item__r.Customer_Name__r.Name}

10. Change the view as Rich Text ? View to Plain Text.

11. In the body field paste the syntax that is given below.

Hello

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

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

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

Ornament: {!\$Record.Ornament__c}

Weight: {!\$Record.Weight__c}grams

Amount: {!\$Record.Amount__c}

12. Click done.

13. Now click on elements, and drag the action element into the preview pane.

14. Their action bar will be opened in that search for “ send email ” and click on it.
15. Give the label name as “ notice”
16. API name will be auto populated.
17. Enable the body in set input values for the selected action.
18. Select the text template that was created.

New Action

Filter By

Category

- Order Management
- Waitlists
- Notifications
- Email**
- Generate Disambiguation
- Feedback Log
- Chatbots
- Sales leads
- SCV Outbound Call
- Approvals
- Case

Action

Send Email

Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.

* Label	* API Name
notice	notice

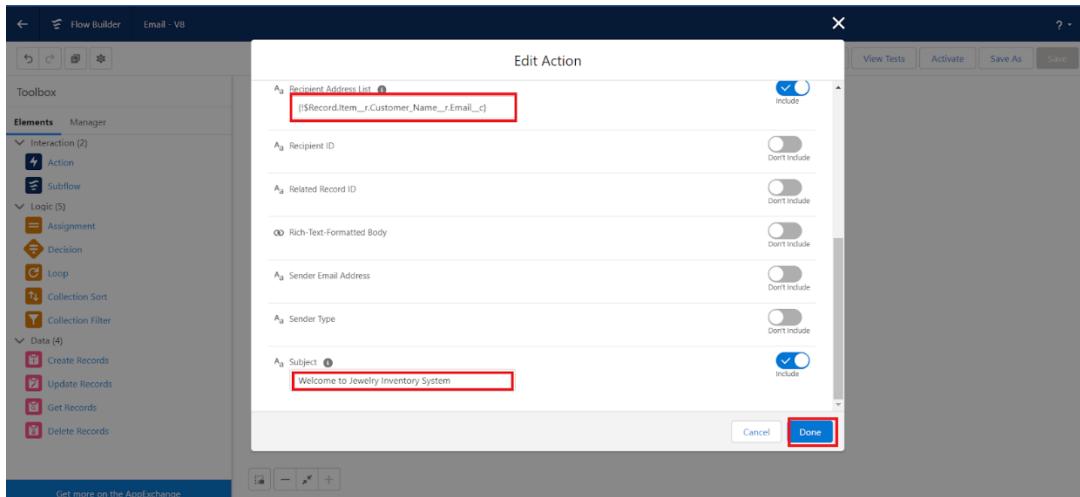
Description

Set Input Values for the Selected Action

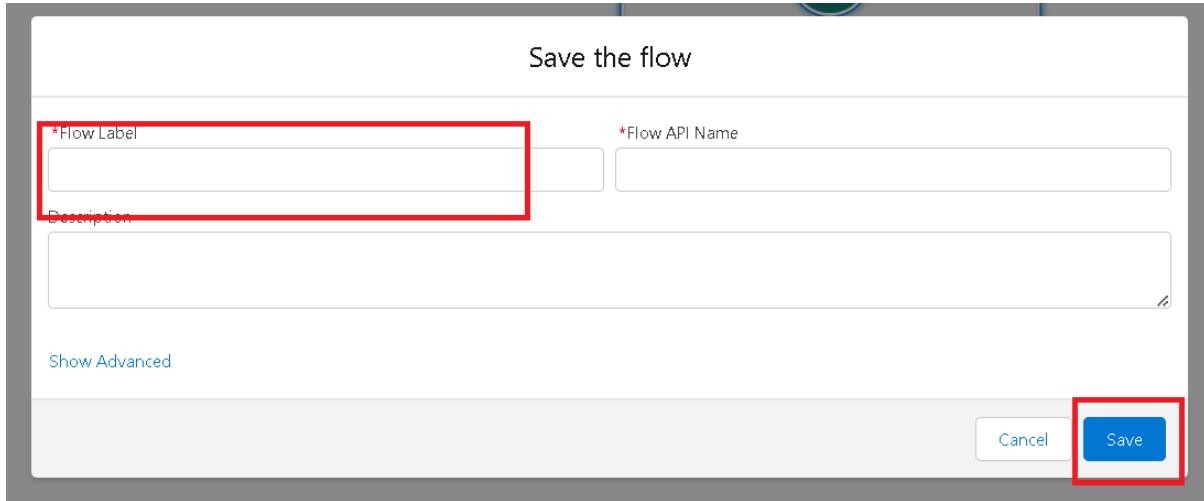
Aa Body	<input type="text" value="{{!Email_Body}}"/>	<input checked="" type="checkbox"/>
Aa Email Template ID	<input type="checkbox"/>	Don't Include
@@ Log Email on Send	<input type="checkbox"/>	Don't Include
An Recipient Address Collection	<input type="checkbox"/>	

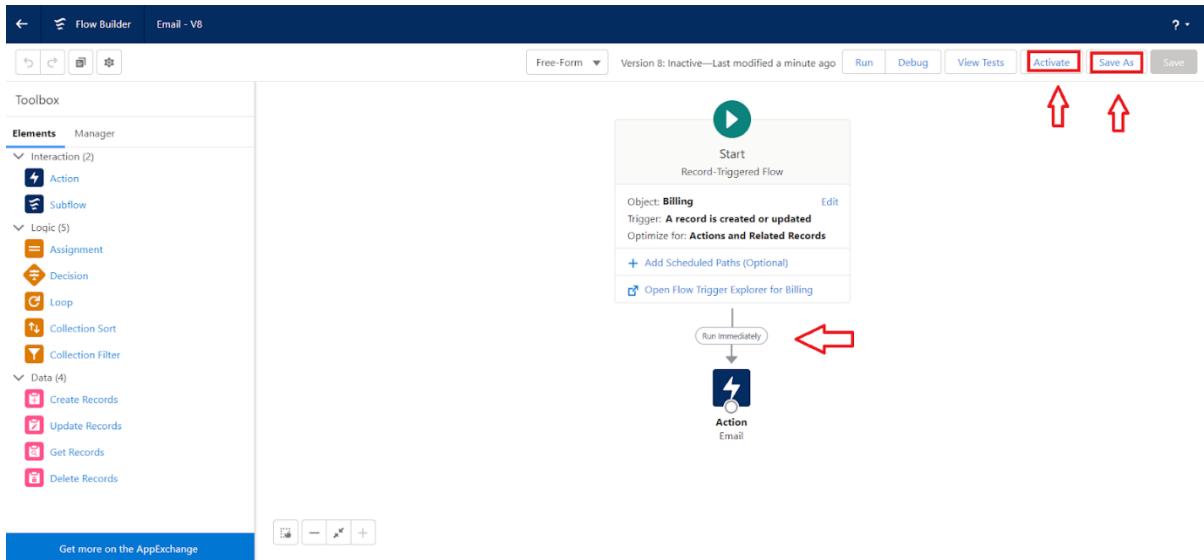
Cancel **Done**

19. Include Recipient Address list, select the email form the record.
 $\{!$Record.Item_r.Customer_Namer.Email_c\}$
20. Include the subject as “Welcome to Jewelry Inventory System ”.
21. Click done.



22. Now drag the path from the start to the action element.
23. Click on save. Given the Flow label , Flow Api name will be auto populated.
24. And click save, and click on activate.





Conclusion:

The development of a CRM (Customer Relationship Management) application for jewelry management provides an efficient, centralized solution for handling customer interactions, sales, inventory, and after-sales services within the jewelry business. By integrating features such as customer data tracking, purchase history management, personalized marketing, and automated notifications, the system enhances customer satisfaction and loyalty while improving operational efficiency.

This CRM application not only streamlines day-to-day business processes but also provides valuable insights through data analytics, enabling better decision-making and targeted marketing strategies. Overall, it bridges the gap between traditional jewelry management and modern digital practices, ensuring sustainable growth, improved productivity, and a superior customer experience.