

1. Abstract:

CRM Application for Jewel Management - (Developer)

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

What we learnt?

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

2. Salesforce

2.1 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/r9EX3lGde5k>

2.3 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:

Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

Sign up for your Developer Edition.

- ✓ Build apps fast with drag-and-drop tools
- ✓ Go further with Apex code
- ✓ Build AI agents with Agentforce
- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs

Agentforce

Customer Support

Sales Coach

Steps
1 Select Type

Sign up for your Developer Edition

A free Salesforce Platform environment with Agentforce and Data Cloud

First name: Paul | Last name: Arul

Job title: Developer | Work email: meichizedek981@gmail.com

Company: User | Country/Region: India

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

We value your privacy. To learn more, visit our Privacy Statement.

I'm not a robot

reCAPTCHA is changing its terms of service.
Take action.

reCAPTCHA
Privacy - Terms

2.4 Account Activation

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

2. Click on Reset Password
3. Give a password and answer a security question and click on change password.

Change Your Password

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

- 8 characters
- 1 letter
- 1 number

* New Password

..... Good

* Confirm New Password

..... March

Security Question

In what city were you born?

* Answer

asdfghijkl

Change Password

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

Search Setup

Setup Home Object Manager

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

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Finally, the account is created and your salesforce application is configured into a developer edition. Go on to developing your CRM platform.

3.Creating Object:

3.1What 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

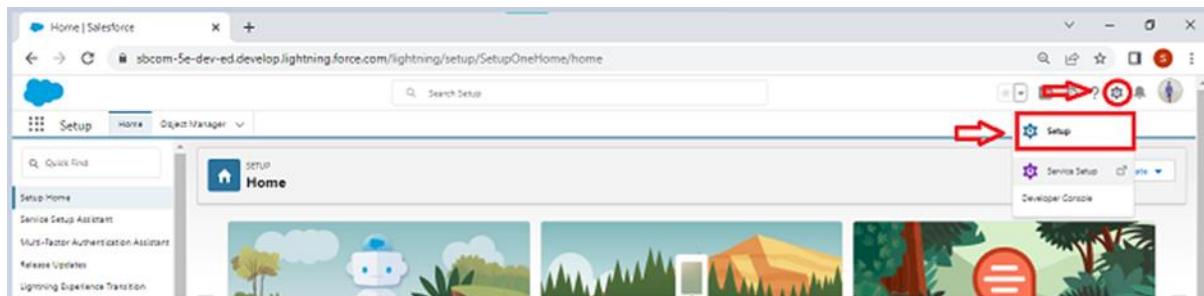
Salesforce objects are of two types:

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.

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.

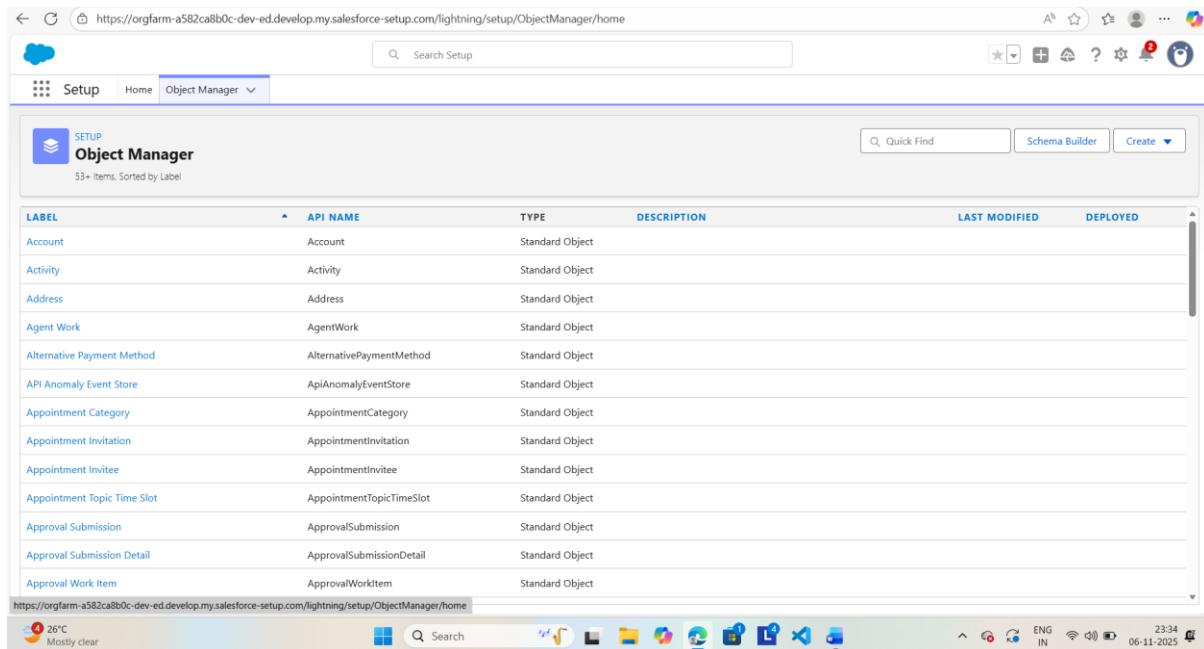


3.2 Create Jewel Customer Object

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

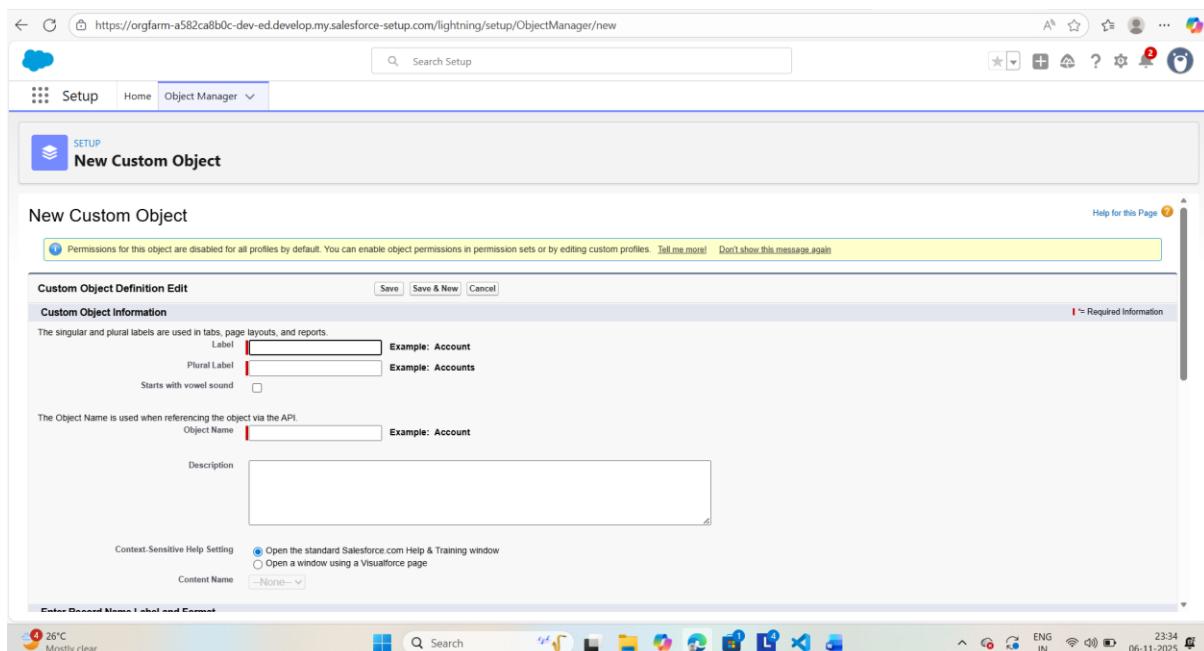
To create an object:

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



The screenshot shows the Salesforce Object Manager page. At the top, there is a search bar labeled "Search Setup". Below the header, there are tabs for "Setup", "Home", and "Object Manager". The main area is titled "Object Manager" and displays a list of 53+ items sorted by Label. The columns in the table are: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. Some of the entries include: Account (Account, Standard Object), Activity (Activity, Standard Object), Address (Address, Standard Object), Agent Work (AgentWork, Standard Object), Alternative Payment Method (AlternativePaymentMethod, Standard Object), API Anomaly Event Store (ApiAnomalyEventStore, Standard Object), Appointment Category (AppointmentCategory, Standard Object), Appointment Invitation (AppointmentInvitation, Standard Object), Appointment Invitee (AppointmentInvitee, Standard Object), Appointment Topic Time Slot (AppointmentTopicTimeSlot, Standard Object), Approval Submission (ApprovalSubmission, Standard Object), Approval Submission Detail (ApprovalSubmissionDetail, Standard Object), and Approval Work Item (ApprovalWorkItem, Standard Object). The bottom of the screen shows the Windows taskbar with various pinned icons and system status information.

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



The screenshot shows the "New Custom Object" page in the Salesforce setup. The title bar says "New Custom Object". There is a message at the top: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more](#) [Don't show this message again](#)". Below this is a "Custom Object Definition Edit" section with tabs for "Save", "Save & New", and "Cancel". The "Custom Object Information" tab is selected. It contains fields for "Label" (with example "Account") and "Plural Label" (with example "Accounts"). There is also a checkbox for "Starts with vowel sound". The "Object Name" field is populated with "Account" and has an example "Account". A "Description" text area is present. At the bottom, there are "Context-Sensitive Help Setting" options: "Open the standard Salesforce.com Help & Training window" (selected) and "Open a window using a Visualforce page". A "Content Name" dropdown is set to "-None-". The bottom of the screen shows the Windows taskbar with various pinned icons and system status information.

3. Enter Record Name Label and Format

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

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: Customer Example: Account Name

Data Type: Text

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing [?](#)

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

[What is this?](#)

- In Development
- Deployed

3. Click on Allow reports.

4. Allow search and click Save.

3.3 Creation of item object:

- Enter Record Name Label and Format
- Record Name >> Item Id
- Data Type >> Auto Number
- Display Format >> Item-{00}
- Starting Number >> 1
- Click on Allow reports.
- Allow search >> Save.
- Create 3 more objects with label names as Customer Order, Price, Billing
- (Use "Auto Number" as a data type for Customer Order, Price, Billing).

1. Tabs:

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.

To create a Tab:(Customer)

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

Custom Tabs

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

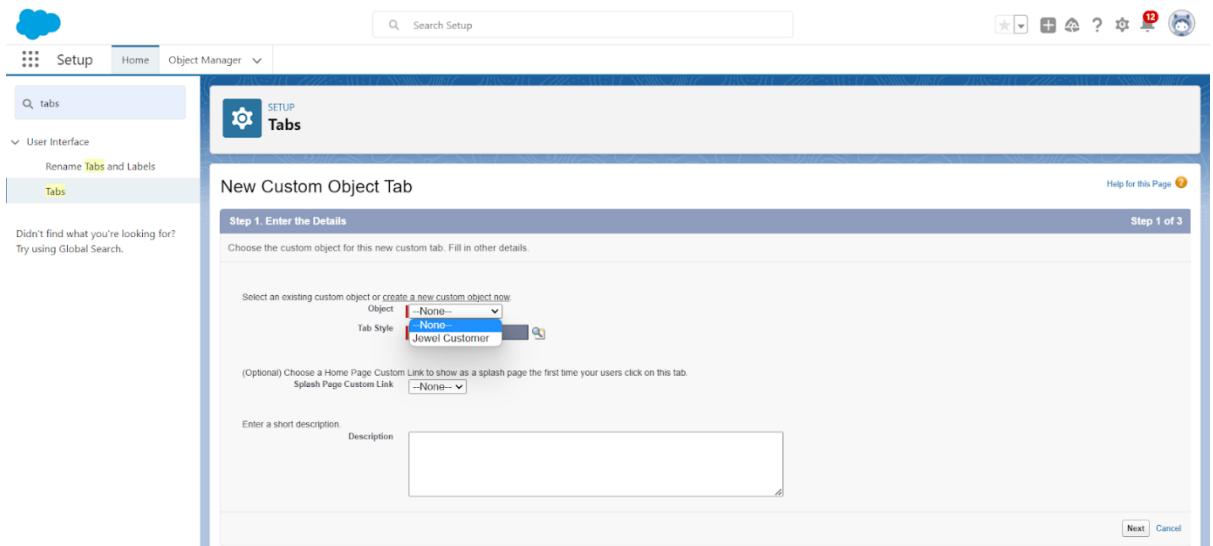
Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external pages. Lightning Component tabs allow you to add Lightning components to the navigation bar. You can also allow you to add Lightning Pages to Lightning Experience and the mobile app.

The screenshot shows two sections of the Salesforce Setup interface:

- Custom Object Tabs:** A header "Custom Object Tabs" is followed by a "New" button (which is highlighted with a red box) and a "What Is This?" link. Below this, a message says "No Custom Object Tabs have been defined".
- Web Tabs:** A header "Web Tabs" is followed by a "New" button and a "What Is This?" link. Below this, a message says "No Web Tabs have been defined".

Fig: Tab Creation

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



4.1 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.

2. 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.

5.1 Creation of Lighting app:

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

The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar has a search bar and navigation links for Setup, Home, and Object Manager. Under the 'App Manager' section, there are categories for External Client Apps (External Client App Manager, Lightning Out 2.0 Apps, Lightning Out 2.0 App Manager). A message says ' Didn't find what you're looking for? Try using Global Search.' The main area displays a table titled 'Lightning Experience App Manager' with 28 items. The columns are: App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The table lists various apps like All Tabs, Analytics Studio, App Launcher, Approvals, Automation, Bolt Solutions, Community, Content, Data Cloud, Data Manager, Developer Edition, Digital Experiences, Jewellery Inventory System, and Lightning Usage App. The 'App Type' column indicates most are Classic, except for a few Lightning and Lightning (Managed) types. The 'Visibility' column shows checkboxes for each row.

App Name	Developer Name	Description	Last Modified	App Type	Vis...
1 All Tabs	AllTabSet		10/27/2025, 3:06 PM	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	10/27/2025, 3:06 PM	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	10/27/2025, 3:06 PM	Classic	✓
4 Approvals	Approvals	Manage approvals and approval flows	10/27/2025, 3:06 PM	Lightning	✓
5 Automation	FlowsApp	Automate business processes and repetitive tasks.	10/27/2025, 3:14 PM	Lightning	✓
6 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	10/27/2025, 3:06 PM	Lightning	✓
7 Community	Community	Salesforce CRM Communities	10/27/2025, 3:06 PM	Classic	✓
8 Content	Content	Salesforce CRM Content	10/27/2025, 3:06 PM	Classic	✓
9 Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	10/27/2025, 3:06 PM	Lightning	✓
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	10/27/2025, 3:06 PM	Lightning	✓
11 Developer Edition	Developer_Edition	Welcome to your Developer Edition Org.	10/27/2025, 3:38 PM	Lightning (Managed)	✓
12 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	10/27/2025, 3:06 PM	Lightning	✓
13 Jewellery Inventory System	Jewellery	Elevate your look with elegance	11/1/2025, 3:18 AM	Lightning	✓
14 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	10/27/2025, 3:06 PM	Lightning	✓

- 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.

The screenshot shows the 'New Lightning App' setup page. The 'App Details & Branding' section contains fields for 'App Name', 'Developer Name', 'Description', and 'App Branding'. The 'App Branding' section includes an 'Image' upload field and a 'Primary Color Hex Value' set to '#0070D2'. A progress bar at the bottom shows step 1 of 6 completed. The URL in the browser is https://orgfarm-a582ca8b0c-dev-ed.develop.my.salesforce-setup.com/lightning/setup/NavigationMenus/home.

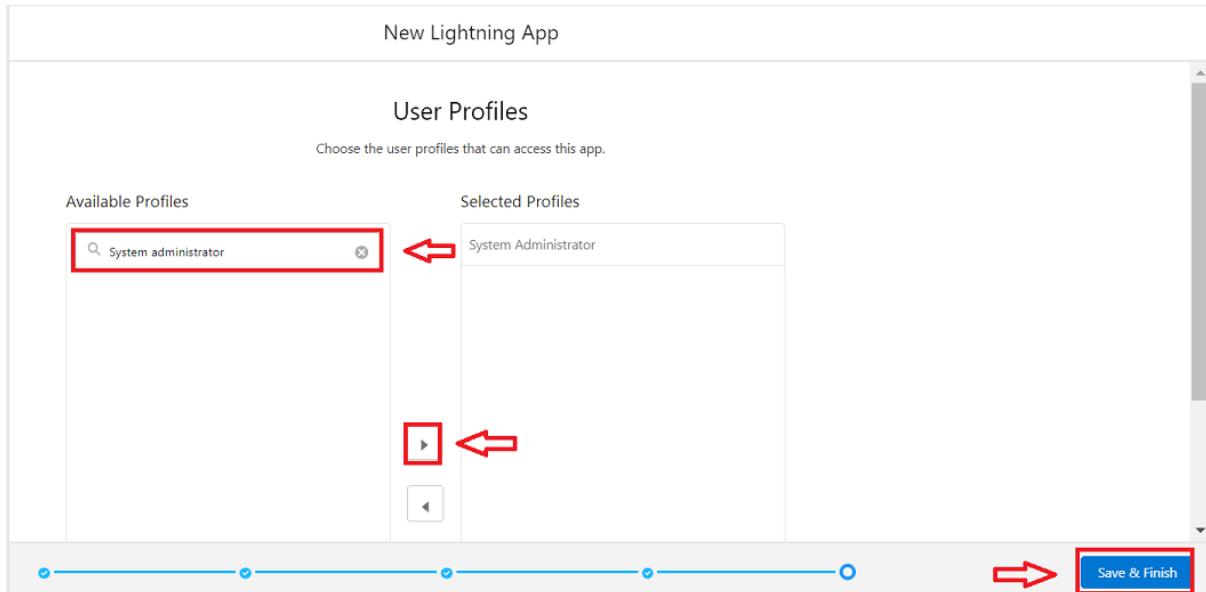
- Then click Next >> (App option page) Set Navigation Style as Console Navigation >> Next.

- Utility Items) keep it as default >> Next.

To Add Navigation Items:

The screenshot shows the 'Navigation Items' configuration screen. The 'Available Items' list includes: Accounts, Alert Settings, All Sites, Alternative Payment Methods, App Launcher, Appointment Invitations, Approval Requests, Asset Action Sources, Asset Actions, and Asset Services. The 'Selected Items' list includes: Jewel Customers, Items, Customer Orders, Prices, Billings, Reports, and Dashboards. The URL in the browser is https://orgfarm-a582ca8b0c-dev-ed.develop.my.salesforce-setup.com/lightning/setup/NavigationMenus/home.

5. 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.
6. To Add User Profiles:



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

6.Creating 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 :

1. Standard Fields
2. Custom Fields

6.1 Creating Lookup Relationship

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

1. Go to the setup page >> click on object manager >> type object name(Customer Order) in the quick find bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select “Lookup relationship” as data type and click Next.

4. Select the related object “Jewel Customer”.
5. Give Field Label as “Customer” and click Next.
6. Next >> Next >> Save.

6.2 Creating a Master-Detail Relationship

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.

6.3 Creating Text Field in Jewel Customer Object

To create fields in an object:

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

The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with the text 'jewel'. Below it, a table lists objects. The first row, 'Jewel Customer', is highlighted with a red box and has a red arrow pointing to its label. The table columns include Label, API Name, Type, Description, Last Modified, and Deployed.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Jewel Customer	Jewel_Customer__c	Custom Object		7/18/2023	

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

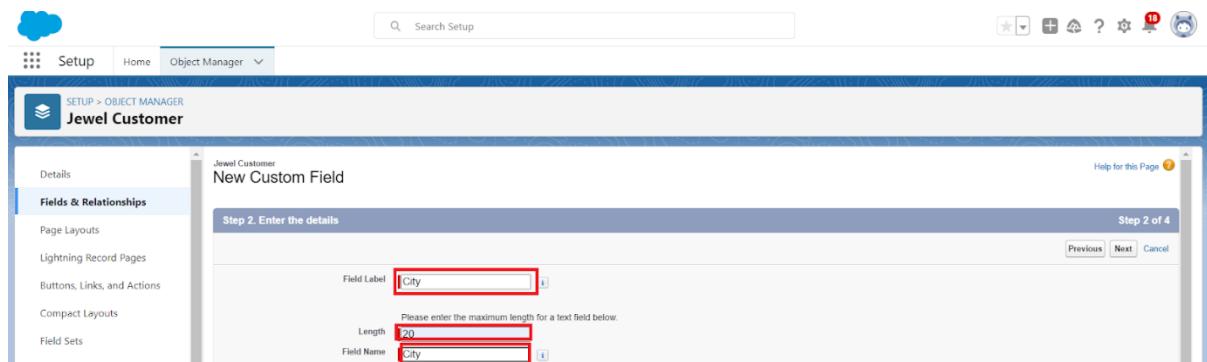
The screenshot shows the 'Fields & Relationships' page for the 'Jewel Customer' object. On the left, there's a sidebar with options like Details, Page Layouts, Lightning Record Pages, and Buttons, Links, and Actions. The main area is titled 'Fields & Relationships' and shows a table of existing fields. At the top right, there's a 'New' button. A red box and arrow highlight the 'Fields & Relationships' tab in the sidebar, and another red box and arrow highlight the 'New' button.

FIELD NAME	TYPE	DESCRIPTION
Country	Text(18)	
Created By	Lookup(User)	
Customer Name	Text(80)	

3. Select Data type as “Text”.

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

4. Click on Next



The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. Below it, 'Object Manager' is open, and 'Jewel Customer' is selected. On the left sidebar, 'Fields & Relationships' is selected. The main area shows 'Step 2. Enter the details' for creating a new custom field named 'New Custom Field'. The 'Field Label' is set to 'City', 'Length' is set to 20, and 'Field Name' is auto-generated as 'City'. The 'Field Label' input field is highlighted with a red box.

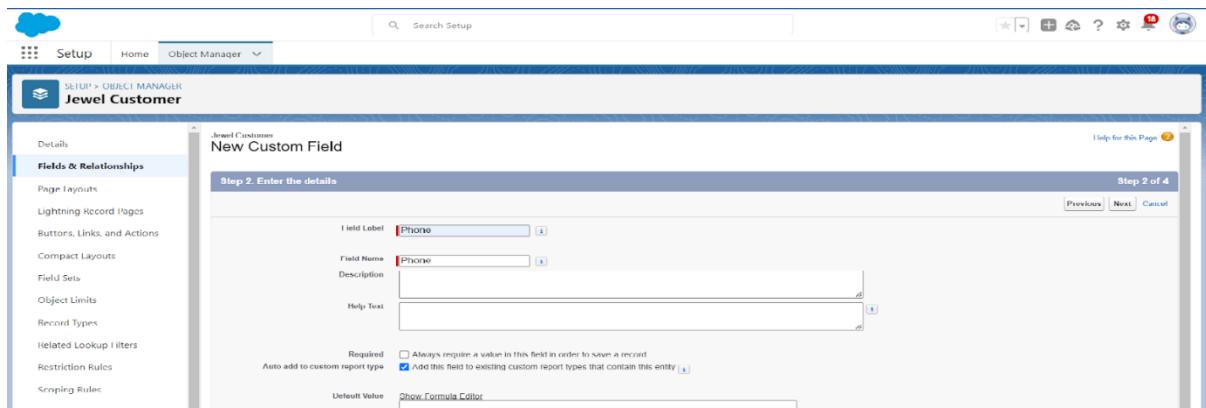
5. Fill the above as following:

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

6.4 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”.



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

6.5 Creating the Email field in object Jewel Customer

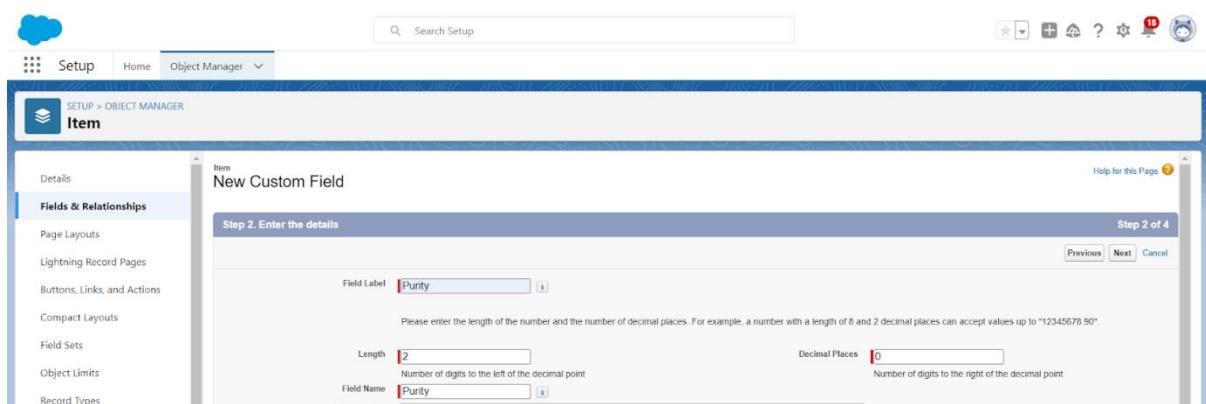
To create fields in an object:

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

6.6 Creating the number field in Item object

To create fields in an object:

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

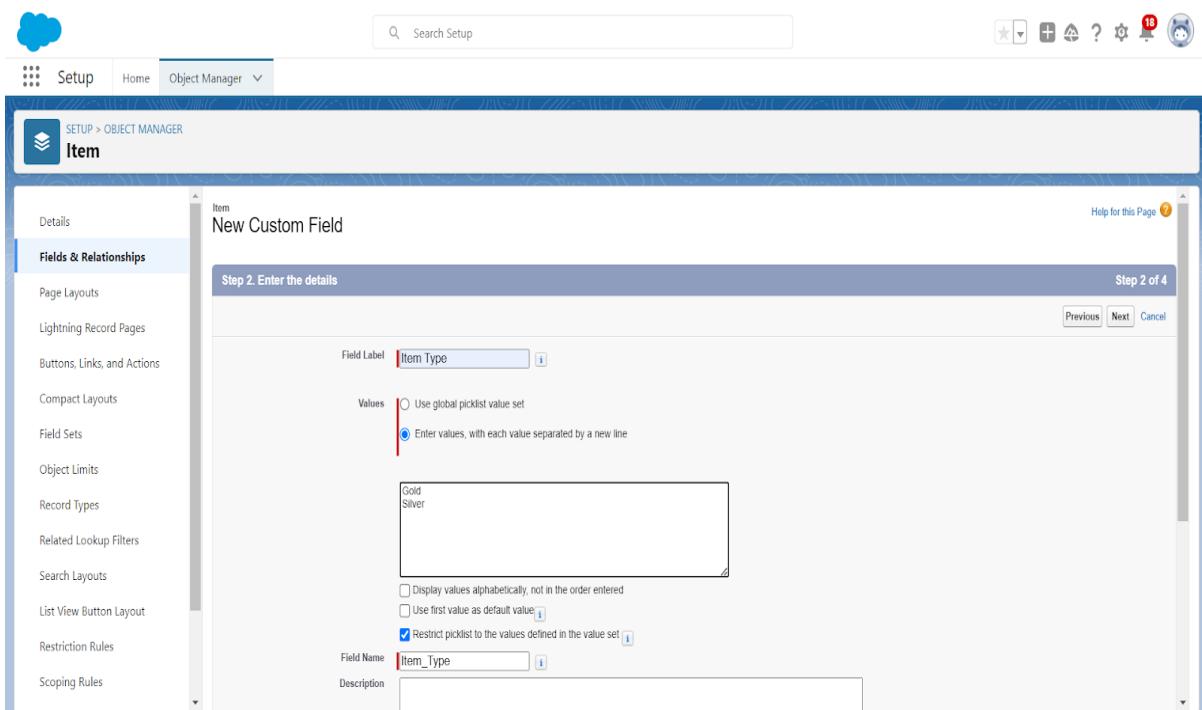


5. Field Name will be auto populated, and click on Next >> Next >> Save.

6.7 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.



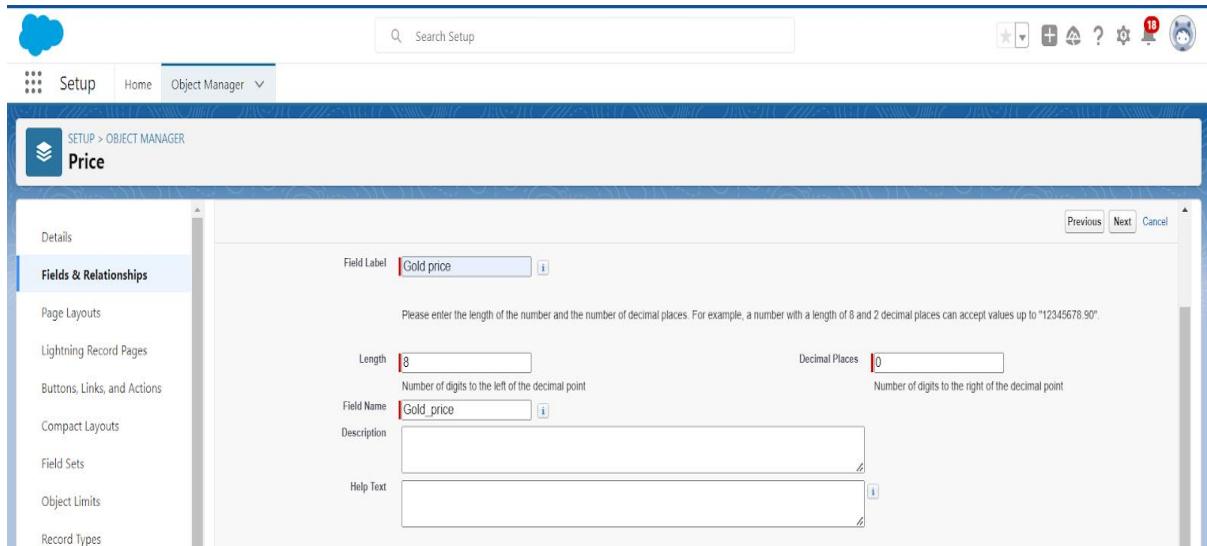
6. Click Next? Next? Next? Next? Save.

6.8 Creating Currency Field in Price Object

To create fields in an object:

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

3. Select Data type as “Currency” and click Next.



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

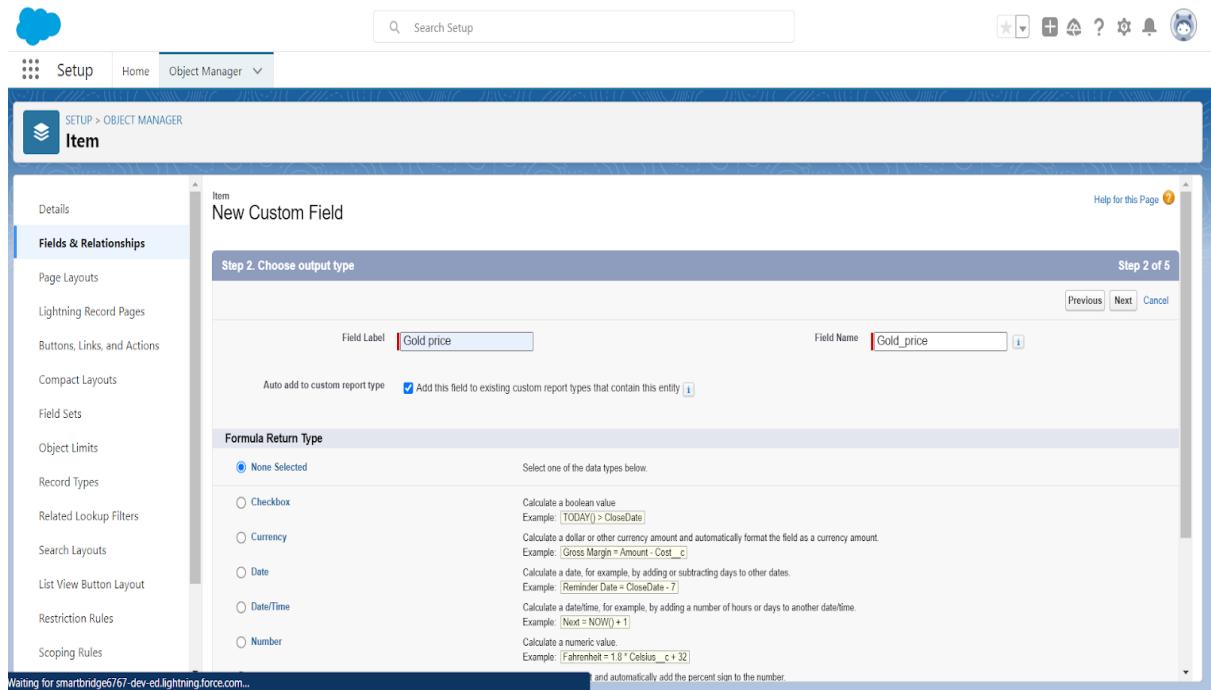
6.8 Creating Formula Field(Cross Object) in Item Object

To create fields in an object:

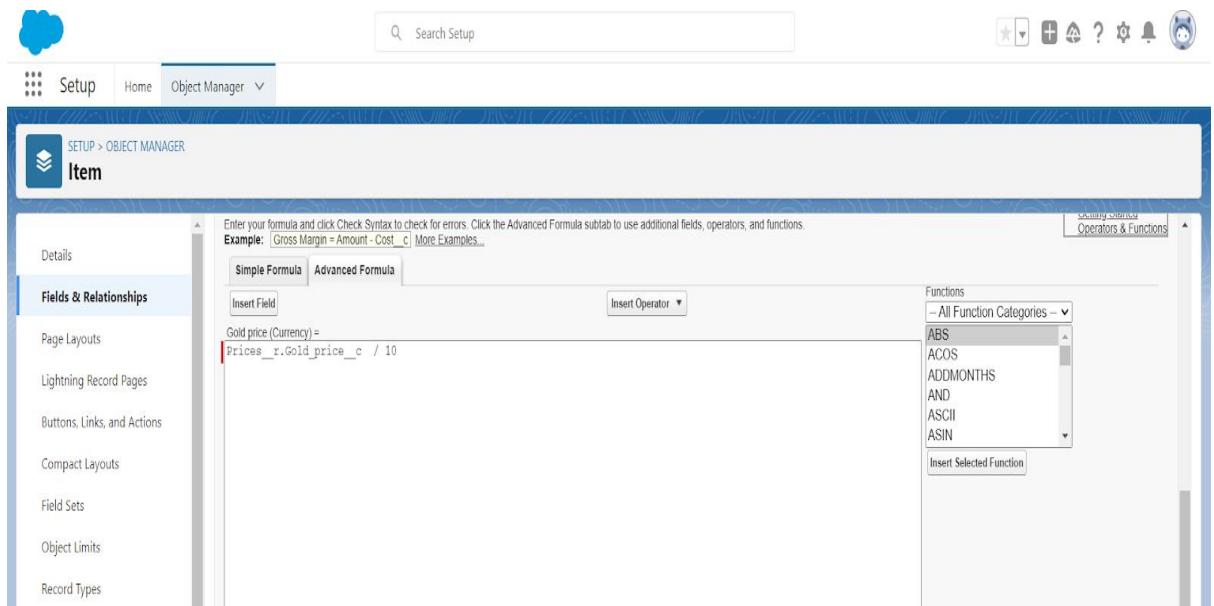
(Note:Create a Lookup Relationship in Item Object to Price Object with Field Name:Prices)

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select Data type as “Formula” and click Next.

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



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



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

6.9 Creating Remaining Fields in Objects

Now create the remaining fields using the data types mentioned.

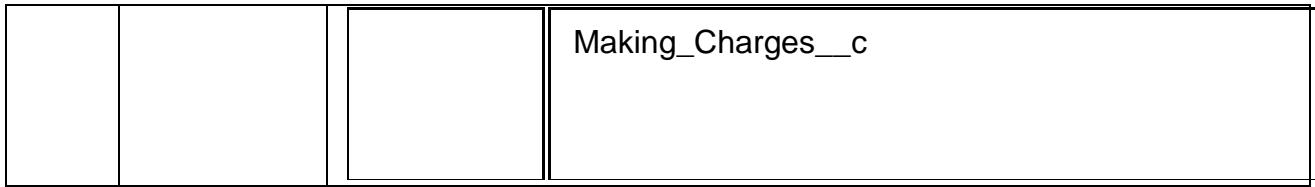
S.No	Object name	Fields	
1.	Jewel Customer	Field Name	Data type
		State	Text(20)
		Street	Text(20)
		Country	Text(18)
		Zip/Postal code	Text(6)
2.	Price	Silver Price	Currency (Length=8,Decimal=5)
3.	Item	Field Label:Customer Name	Lookup Relationship with Jewel Customer Object
		Ornament	Text(20)
		Weight	Number (Length=8,Decimal=5)
		Stone Weight	Number (Length=5,Decimal=5)
		Percentage	Number (Length=2,Decimal=0)
		Stone/Other Price	Currency (Length=8,Decimal=2)
		Expected Days Of Return	Picklist

			<div style="border: 1px solid black; padding: 5px; display: inline-block;"> 1-3 Days 4-5 Days 6-7 Days 8-10 Days </div>
	Priority	Picklist	<div style="border: 1px solid black; padding: 5px; display: inline-block;"> Low Medium High Critical </div>
	Silver Price	Formula (Return Type:Number) (Decimal=3)	<div style="border: 1px solid black; padding: 5px; display: inline-block;"> $(\text{Prices_r.Silver_price} \text{ _c} / 1000)$ </div>
	Purity Gold Price	Formula (Return Type:Currency) (Decimal=2)	<div style="border: 1px solid black; padding: 5px; display: inline-block;"> $((\text{Prices_r.Gold_price} \text{ _c} * \text{Purity_c}) / 24) / 10$ </div>
	Total Weight	Formula (Return Type:Number) (Decimal=3)	

		(Weight_c - Stone_weight_c)
	Amount	<p>Formula (Return Type:Currency) (Decimal=3)</p> <pre>IF(ISPICKVAL(Item_Type_c ,"Gold"), Total_weight_c * P urity_Gold_price_c , Total_weight_c * Si lver_price_c)</pre>
	KDM	<p>Formula (Return Type:Currency) (Decimal=0)</p> <pre>(Amount_c * Perc entage_c) / 100</pre>
	Making Charges	<p>Formula (Return Type:Currency) (Decimal=0)</p> <pre>IF(ISPICKVAL(Item_Type_c ,"Gold"), Weight_c</pre>

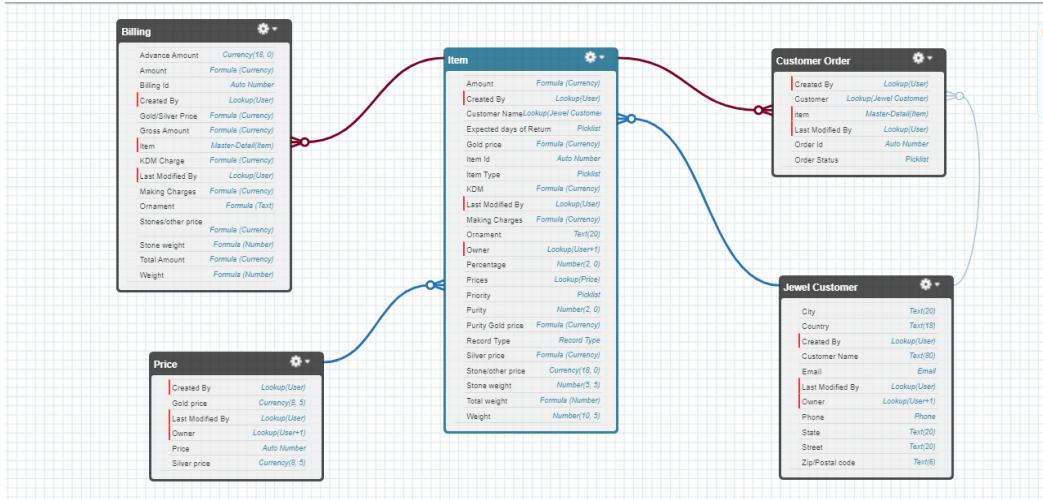
			* 300 , Weight_c * 10)
4.	Customer Order	Order Status	Picklist Started Not Started On Hold Completed Not Completed
5.	Billing	Field Label:Item	Lookup Relationship with Item Object
	Ornament	Ornament	Formula (Return Type:Text) Item__r.Ornament__c
	Stone weight	Stone weight	Formula (Return Type:Number) (Decimal=2) Item__r.Stone_weight__c
	Weight	Weight	Formula Return Type:Number (Decimal=2) Item__r.Total_weight__c

	Amount (Return Type:Currency)	Formula (Decimal=2) Item__r.Amount__c
	Gold/Silver Price	Formula (Return Type:Currency) (Decimal=2) IF(ISPICKVAL(Item__r.Item_Type__c , "Gold"), Item__r._c , Item__r.Silver_price__c)
	KDM Charge	Formula (Return Type:Currency) (Decimal=0) Item__r.KDM__c
	Making Charges	Formula (Return Type:Currency) (Decimal=2) Item__r.Making_Charges__c
	Stones/oth er price	Formula (Return Type:Currency) (Decimal=2) Item__r.Stone_other_price__c
	Total Amount	Formula (Return Type:Currency) (Decimal=0) Amount__c + KDM_Charge__c + Stones_other_price__c +



6.10 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.



6.11 Creating the Field Dependencies

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 Setup interface for the 'Item' object. The 'Fields & Relationships' tab is selected. In the 'Field Information' section, the field is named 'Priority' with API name 'Priority__c'. Under 'General Options', 'Required' is unchecked. In the 'Picklist Options' section, the checkbox 'Restrict picklist to the values defined in the value set' is checked. The 'Controlling Field' dropdown is set to '[New]'. At the bottom right, there is a red box around the 'Field Dependencies' button.

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

The screenshot shows the 'New Field Dependency' setup page. It displays two dropdown menus: 'Controlling Field' (set to 'Priority') and 'Dependent Field' (set to 'Expected days of Return'). Below the dropdowns are 'Continue' and 'Cancel' buttons. A red box highlights the 'Continue' button.

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

The screenshot shows the 'Field Dependencies' configuration page for the 'Priority' field. It lists 'Expected days of Return' under the 'Dependent Field' column. A legend indicates 'Excluded Value' (grey) and 'Included Value' (yellow). A red box highlights the 'Included Value' button in the legend. The 'Save' button is visible at the bottom.

6.12 Creating the validation rule

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.

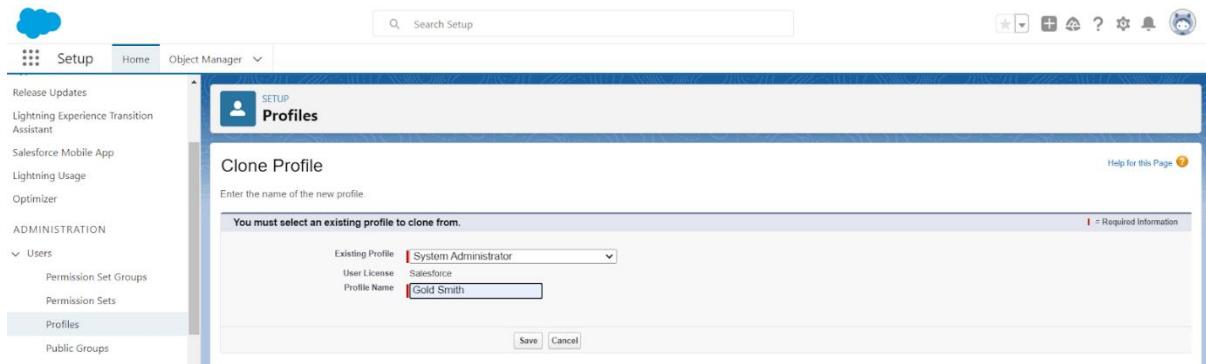
7.Fields

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.

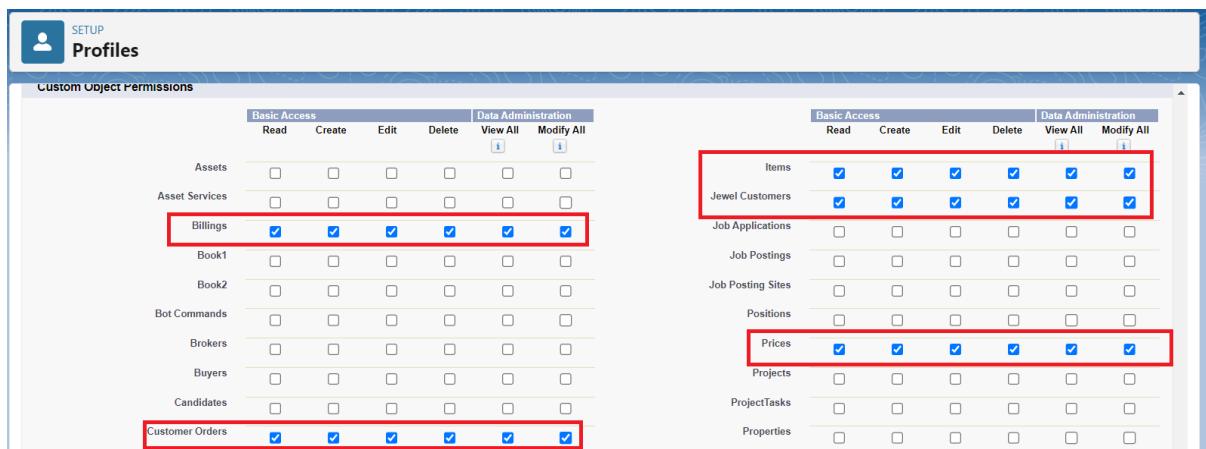
7.1 Gold Smith Profile

To create a new profile:

1. Go to setup >> type profiles in quick find box >>click on profiles ? clone the desired profile (System Administrator) >> enter profile name (Gold Smith) >> Save.



2. While still on the profile page, then click Edit. Scroll down to Custom Object Permissions and Give access permissions for Jewel Customer,Item,Customer Order,Prices,Billings



3. Scroll down and Click on Save.

7.2 Worker Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Salesforce Platform User) >> enter profile name () >> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Items,Price and Customer Order objects.
4. Scroll down and Click on Save.

8.Roles:

8.1 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 Roles page. The left sidebar has a search bar and navigation links for Users, Roles, Feature Settings, Sales, Service, Case Teams, and Case Team Roles. The main area is titled 'Understanding Roles' with a sub-section 'Sample Role Hierarchy'. It shows a hierarchy from 'Executive Staff' down to 'Western Sales Rep', 'Eastern Sales Rep', and 'International Sales Rep'. Each node has a description of its permissions. A red box highlights the 'Roles' link in the sidebar and the 'Add Role' link under the 'CFO' node in the hierarchy tree.

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

This screenshot shows the expanded role hierarchy for 'Nick Enterprises'. The 'Expand All' button is highlighted with a red box. The hierarchy includes 'Add Role' under 'CFO', 'HR', 'Manager', and 'On Site Emp'. Each 'Add Role' node has its own 'Add Role' link. A red box highlights the 'Add Role' link under the 'CFO' node.

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

This screenshot shows the 'Role Edit' screen for 'Gold Smith'. The 'Label' field is set to 'Gold Smith'. The 'Role Name' field also contains 'Gold Smith'. The 'This role reports to' dropdown is set to 'CEO'. The 'Role Name as displayed on reports' field is also 'Gold Smith'. The bottom of the screen has 'Save', 'Save & New', and 'Cancel' buttons. A red box highlights the 'Label' field.

8.2 Create one more role as Worker which reports to Gold Smith.



9. 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:

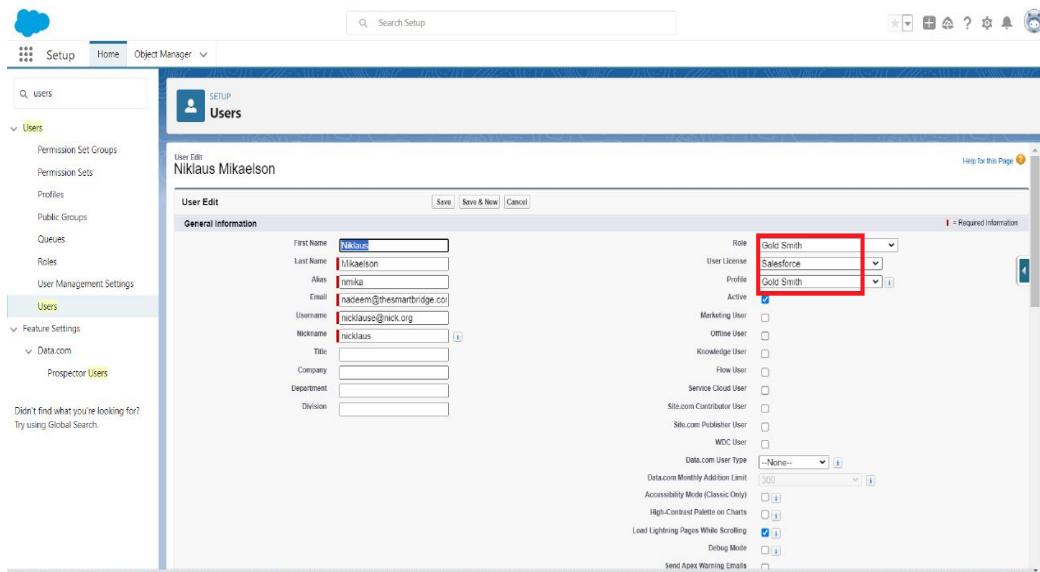
- Username
- Email Address
- User's First Name (optional)
- User's Last Name
- Alias
- Nickname
- Licence
- Profile
- Role (optional)

9.1 Create User

Go to setup >> type users in quick find box >> select users >> click New user.

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



10. Save.

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

10. 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.

10.1 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. The page layout list shows one item: 'Item Layout'. The 'Created By' column shows 'meghana katoju, 6/29/2023, 10:48 PM'. The 'Modified By' column shows 'meghana katoju, 7/18/2023, 11:45 AM'. The top right corner of the page layout list has a red box around the 'New' button.

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. Under 'Existing Page Layout', 'Item Layout' is selected. The 'Page Layout Name' field contains 'Page Layout for Gold', which is also highlighted with a red box. At the bottom are 'Save' and 'Cancel' buttons.

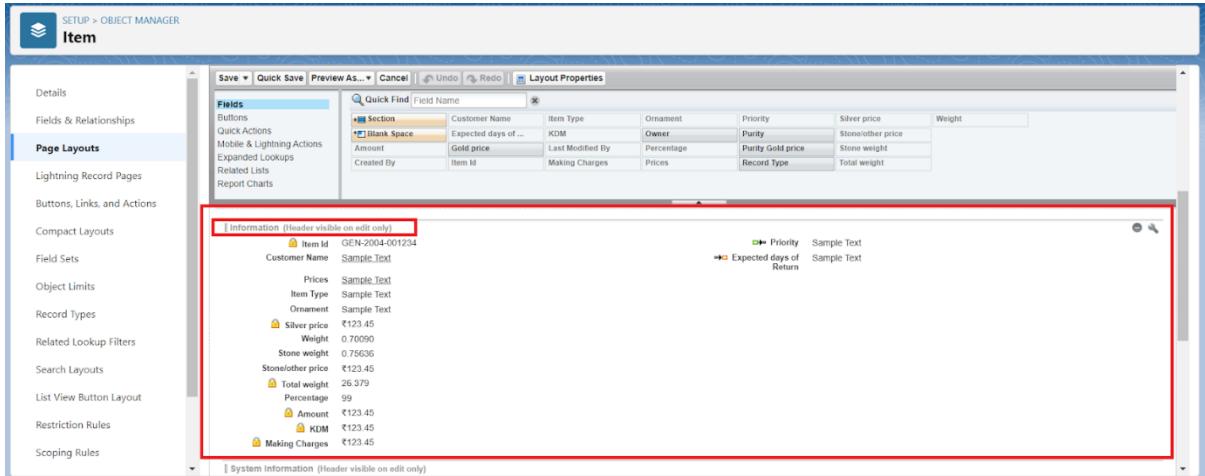
4. Arrange the field as shown in the Information Section ,remove fields which are related to Silver and click Ok.

The screenshot shows the 'Layout Properties' dialog for the 'Page Layout for Gold'. The 'Fields' section lists various fields: Item Id, Customer Name, Item Type, Ornament, Priority, Silver price, Weight, Expected days of Return, Price, Item Type, Ornament, Gold price, Purity Gold price, Label Purity, Name Purity, Type Number, Length 2, Decimal Places 0, and Record Type. The 'Information' section is highlighted with a red box and contains fields: Item Id, Customer Name, Price, Item Type, Ornament, Gold price, Purity Gold price, Weight, Percentage, Purity, Price, Item Id, Last Modified By, Percentage, Purity Gold price, Label Purity, Name Purity, Type Number, Length 2, Decimal Places 0, and Record Type. A yellow box highlights the 'Record Type' section. The bottom right corner of the dialog has a red box around the 'OK' button.

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

10.2 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.

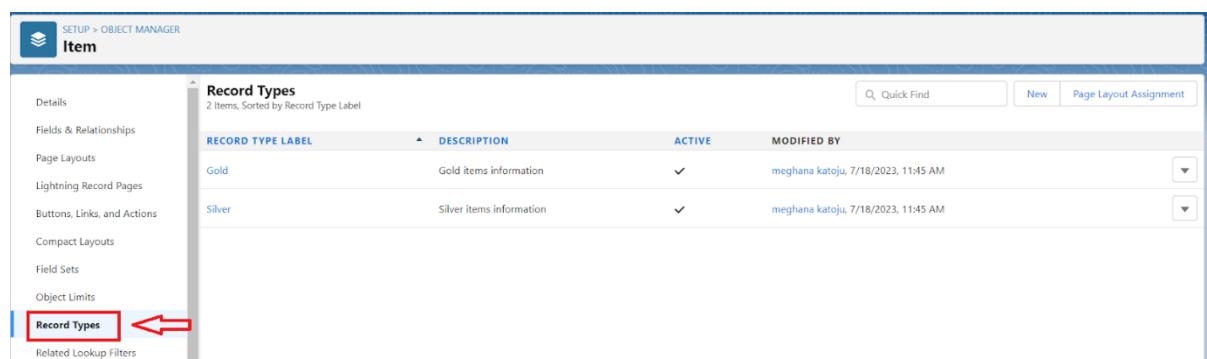


11. Record Types

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.

11.1 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.



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

SETUP > OBJECT MANAGER
Item

Edit Record Type
Gold

Enter a new name for the selected record type and click Save.

Record Type	
Record Type Label	<input type="text" value="Gold"/>
Record Type Name	<input type="text" value="Gold"/> <small>(A)</small>
Namespace Prefix	<input type="text" value="Gold items information"/>
Description	<input type="text" value="Gold items information"/>
Active	<input checked="" type="checkbox"/>
<small>I = Required Information</small>	
<small>Help for this Page <small>(1)</small></small>	
<small>Save Cancel</small>	

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

4. Uncheck for “Make Available”.

Profile Name	Record Types Currently Available	<input type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Analytics Cloud Integration User		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter External User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter Free User		<input type="checkbox"/>	<input type="checkbox"/>

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

SETUP > OBJECT MANAGER
Item

Customer Portal Manager Standard
External Apps Login User
External Identity User
Force.com - App Subscription User
Force.com - Free User
Gold Partner User
Gold smith
High Volume Customer Portal User
HR
HR Recruiter
Identity User
J Worker1
J Worker2
J Worker3
Manager
Marketing User
Minimum Access - Salesforce User
Partner Ann Subscription User

Record Type	Profile	<input checked="" type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Customer Portal Manager Standard		<input type="checkbox"/>	<input type="checkbox"/>
External Apps Login User		<input type="checkbox"/>	<input type="checkbox"/>
External Identity User		<input type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
Gold smith	Gold (Default), Silver	<input checked="" type="checkbox"/>	<input type="checkbox"/>
High Volume Customer Portal User		<input type="checkbox"/>	<input type="checkbox"/>
HR	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
HR Recruiter	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
Identity User	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
J Worker1	Gold (Default), Silver	<input checked="" type="checkbox"/>	<input type="checkbox"/>
J Worker2	Gold (Default), Silver	<input checked="" type="checkbox"/>	<input type="checkbox"/>
J Worker3	Gold (Default), Silver	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Manager	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
Marketing User	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce User	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
Partner Ann Subscription User	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>

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

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 ?

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

save&new

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.

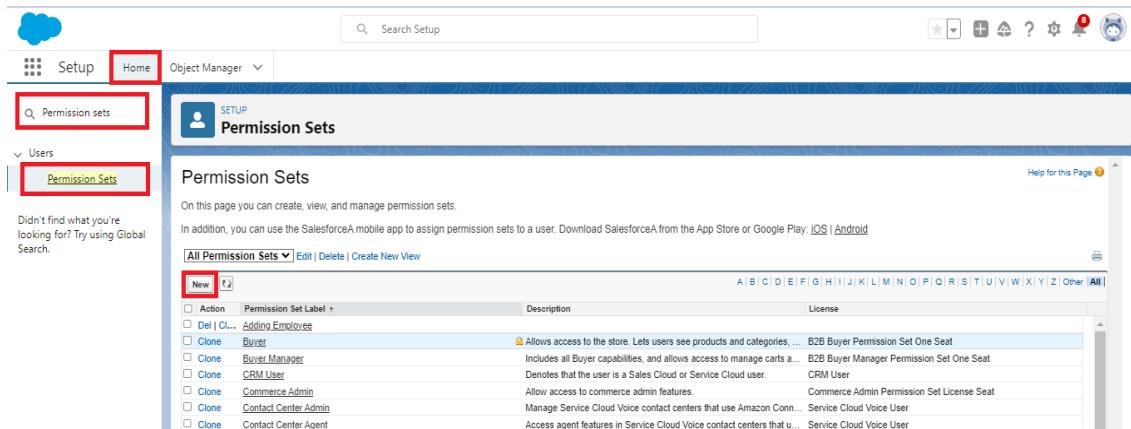
Note: Use page layout for Silver.

12. 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.

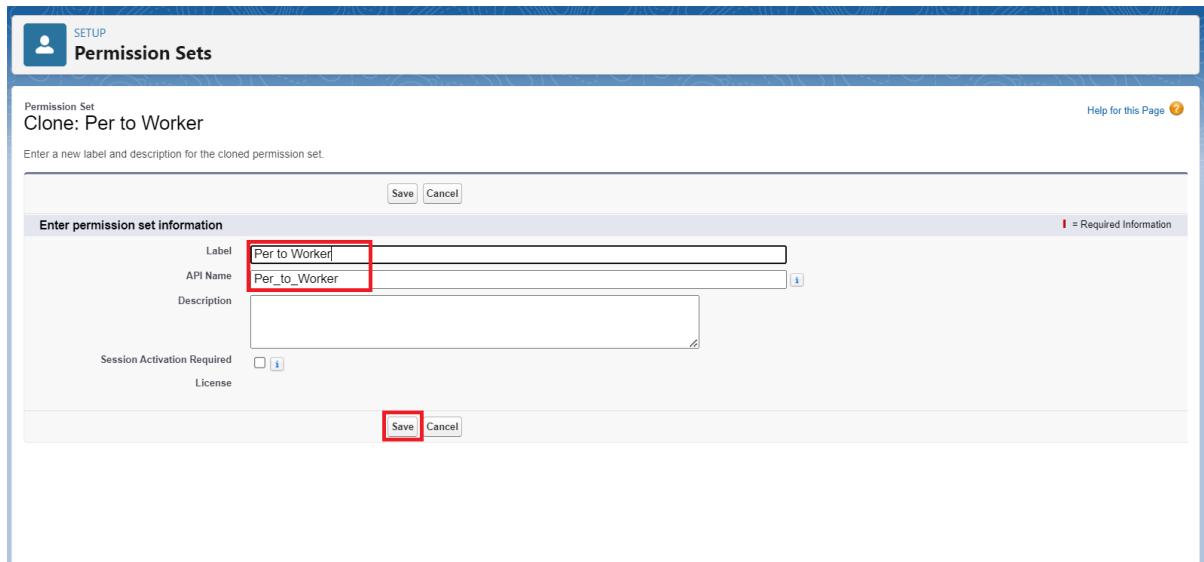
12.1 Creating permission set

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



The screenshot shows the Salesforce Setup interface. In the top left, there's a blue cloud icon followed by 'Setup' and 'Home'. Below these are two red boxes: one over the 'Permission sets' search bar and another over the 'Permission Sets' link under 'Users'. The main area is titled 'Permission Sets' and contains a table of existing permission sets. A red box highlights the 'New' button at the top left of the table. The table columns are 'Action', 'Permission Set Label', 'Description', and 'License'. One row is selected, showing 'Clone' for Action, 'Buyer' for Label, and a detailed description for the 'Buyer' permission set.

2. 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 page. At the top, it says 'Enter a new label and description for the cloned permission set.' Below that is a 'Save' and 'Cancel' button. The main form has fields for 'Label' (containing 'Per to Worker'), 'API Name' (containing 'Per_to_Worker'), 'Description' (empty), 'Session Activation Required' (unchecked), and 'License' (empty). A red box highlights the 'Label' input field. The bottom of the page has a 'Save' and 'Cancel' button again.

3. Under Apps Select object settings.

Apps

Assigned Apps Settings that specify which apps are visible in the app menu
Assigned Connected Apps Settings that specify which connected apps are visible in the app menu
Object Settings Permissions to access objects and fields, and settings such as tab availability
App Permissions Permissions to perform app-specific actions, such as "Manage Call Centers"
Apex Class Access Permissions to execute Apex classes
Visualforce Page Access Permissions to execute Visualforce pages
External Data Source Access Permissions to authenticate against external data sources
Flow Access Permissions to execute Flows
Named Credential Access Permissions to authenticate against named credentials
Custom Permissions Permissions to access custom processes and apps
Custom Metadata Types Permissions to access custom metadata types
Custom Setting Definitions Permissions to access custom settings

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

- 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

- Click on Save.
- After saving the permission click on the Manage assignment
- Now click on the Add Assignment.

Current Assignments

Add Assignment

Select Users to Assign

All Users ▾

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

Cancel Next

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

No expiration date i

Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone i Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Mani deepak	Worker	Worker	<input checked="" type="checkbox"/>	Salesforce Platform	Never Expires

Cancel Back Assign

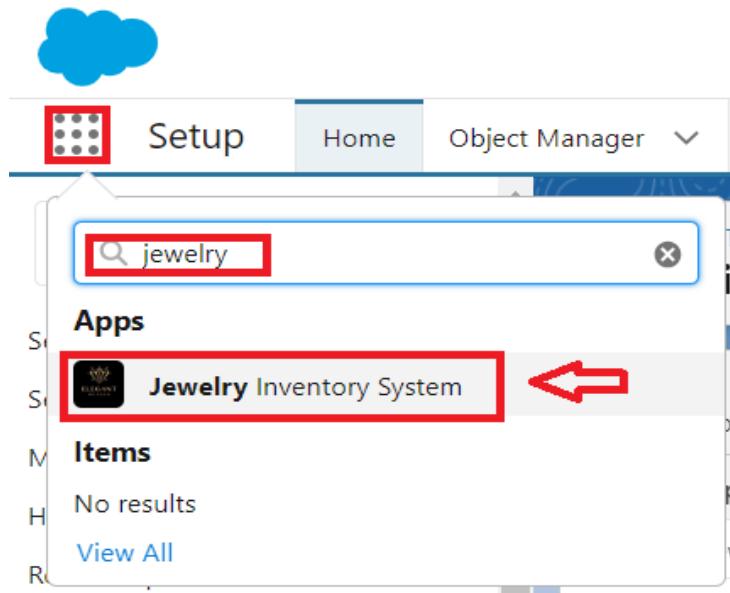
13. Trigger

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.

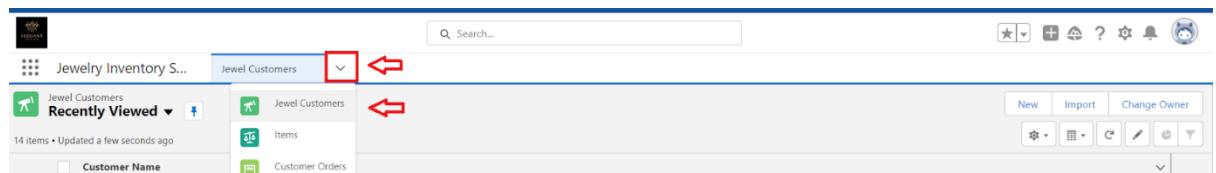
14. User Adoption

14.1 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.

14.2 View 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 the Jewel Customer Tab.
4. Click on any record name. you can see the details of the Jewel Customer.

14.3 Delete 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 the Jewel Customer Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete.

Note:

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

15. Reports

15.1 Create Report

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

	Folder	Created By	Created On	Subscribed
Private Reports	meghana katoju	7/19/2023, 4:34 AM		
Private Reports	meghana katoju	7/19/2023, 4:30 AM		
Private Reports	meghana katoju	7/19/2023, 4:27 AM		
DreamHouse Reports	meghana katoju	5/31/2022, 11:25 PM		
Private Reports	meghana katoju	7/12/2023, 8:45 PM		
Private Reports	meghana katoju	7/10/2023, 8:48 PM		
Private Reports	meghana katoju	7/12/2023, 12:03 AM		
Private Reports	meghana katoju	7/12/2023, 12:01 AM		
Private Reports	meghana katoju	7/11/2023, 11:49 PM		
Private Reports	meghana katoju	7/11/2023, 11:39 PM		
Private Reports	meghana katoju	6/20/2023, 11:19 PM		
Private Reports	meghana katoju	6/20/2023, 11:08 PM		

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

Report Type Name	Category
Price Books with Products	Standard
Items with Prices	Standard
Prices	Standard

4. Customise your report

The screenshot shows the Report Builder interface. On the left, the 'Fields' pane is open, displaying 'Groups' (with 'GROUP ROWS') and 'Columns' (with 'Add column...', 'Price: Price', '# Gold price', and '# Silver price'). A red box highlights the 'Add column...' button. The main area shows a preview grid with 10 rows and 4 columns. The columns are labeled 'Price: Price' (containing values p-022 through p-023), '# Gold price' (containing values ₹60,000.00000 through ₹609,950.00000), '# Silver price' (containing values ₹71,000.00000 through ₹714,200.00000), and an unlabeled fourth column. A message at the top right says 'To see the latest edits, refresh the preview. Refresh.' A red box highlights the 'Run' button in the top right corner.

- Add fields from the left pane as shown below.

5. Save or run it.

The screenshot shows the Report Builder interface after adding more columns. The 'Fields' pane now includes 'Price: Price', '# Gold price', and '# Silver price'. The preview grid now has 11 rows and 5 columns. The columns are labeled 'Price: Price' (p-022 through p-023), '# Gold price' (₹60,000.00000 through ₹609,950.00000), '# Silver price' (₹71,000.00000 through ₹714,200.00000), an unlabeled fourth column, and an unlabeled fifth column. A message at the top right says 'Previewing a limited number of records. Run the report to see everything.' A red box highlights the 'Run' button in the top right corner.

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

15.2 Reports

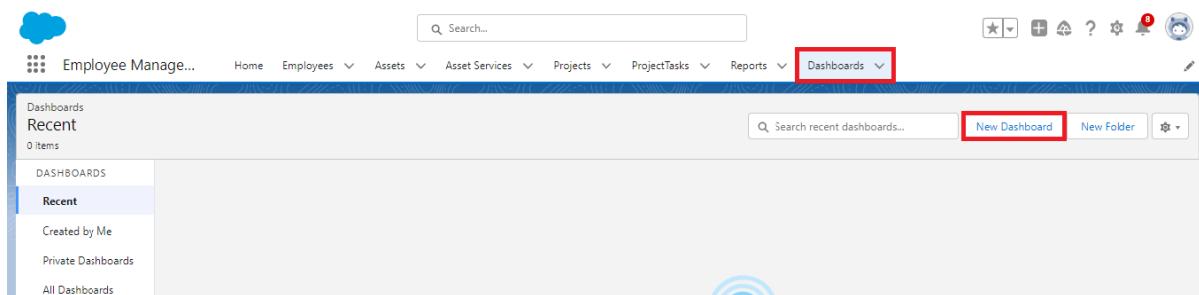
1. Create a report with report type: “Item with Billings”.
2. Create a report with report type: “Billings with item and Customer order”.

16. 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.

16.1 Create Dashboard

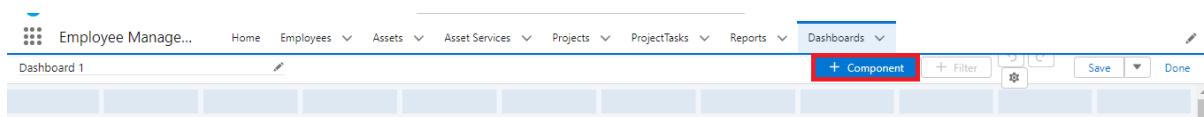
1. Go to the app >> click on the Dashboards tabs.



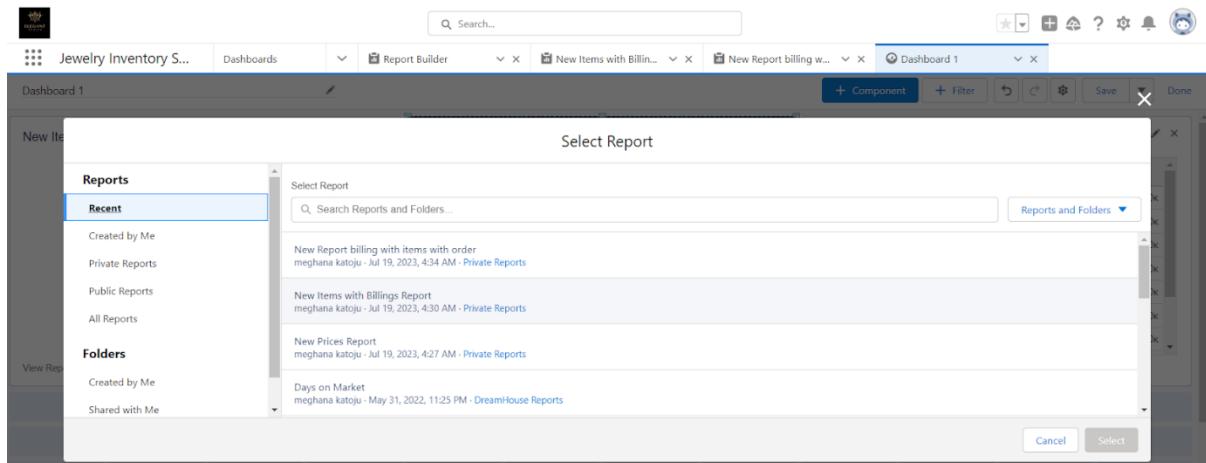
2. Give a Name and click on Create.

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

3. Select add component.

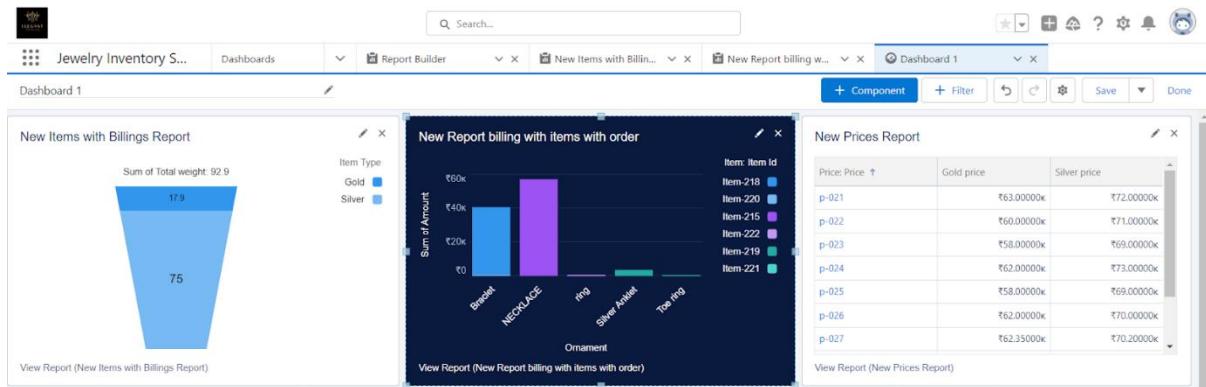


4. Select a Report and click on select.



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

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



17. 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.

17.1

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

The screenshot shows the Salesforce Setup interface. In the top left, there's a search bar with 'flows' typed in. Below it, under 'Process Automation', there's a link labeled 'Flows' which is highlighted with a red box and a number '2'. In the top right corner, there's a 'New Flow' button which is also highlighted with a red box and a number '3'.

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

The screenshot shows the 'New Flow' creation page. Under the 'Core' tab, there are several flow types listed: 'Screen Flow', 'Record-Triggered Flow' (which is highlighted with a red box and a number '1'), 'Schedule-Triggered Flow', 'Platform Event—Triggered Flow', 'Autolaunched Flow (No Trigger)', and 'Record-Triggered Orchestration'. At the bottom right of the page, there is a 'Create' button which is also highlighted with a red box and a number '2'.

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

Configure Trigger

Trigger the Flow When:

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

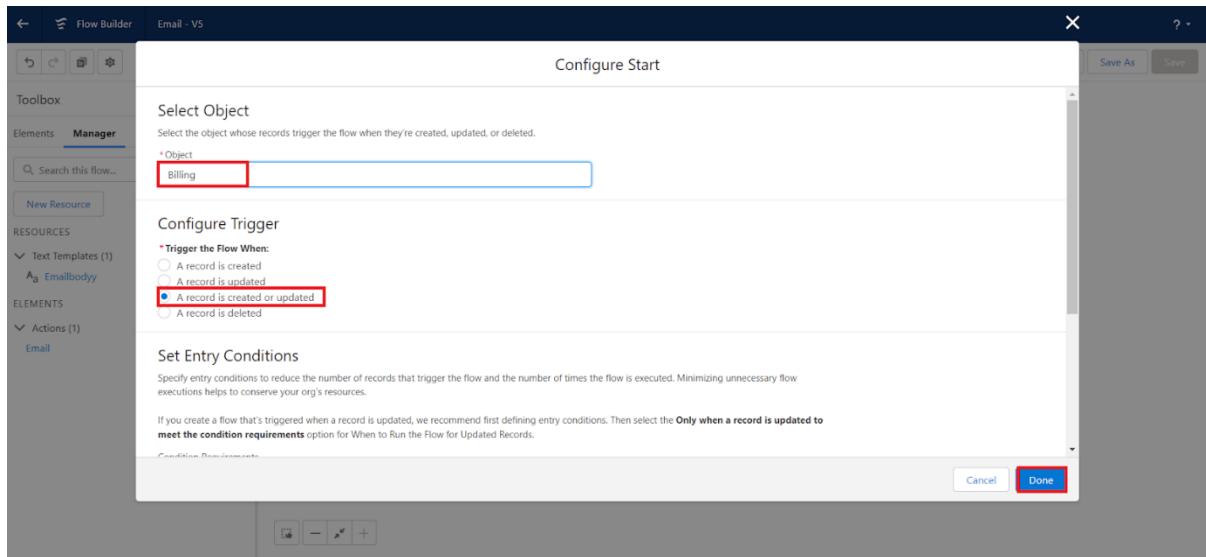
Set Entry Conditions

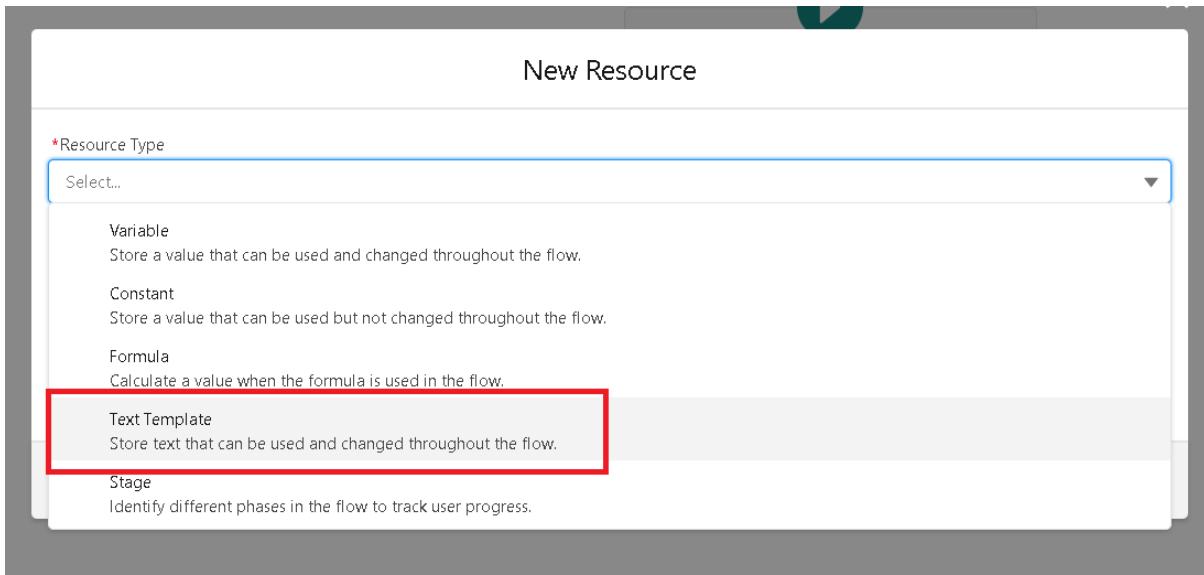
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

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.

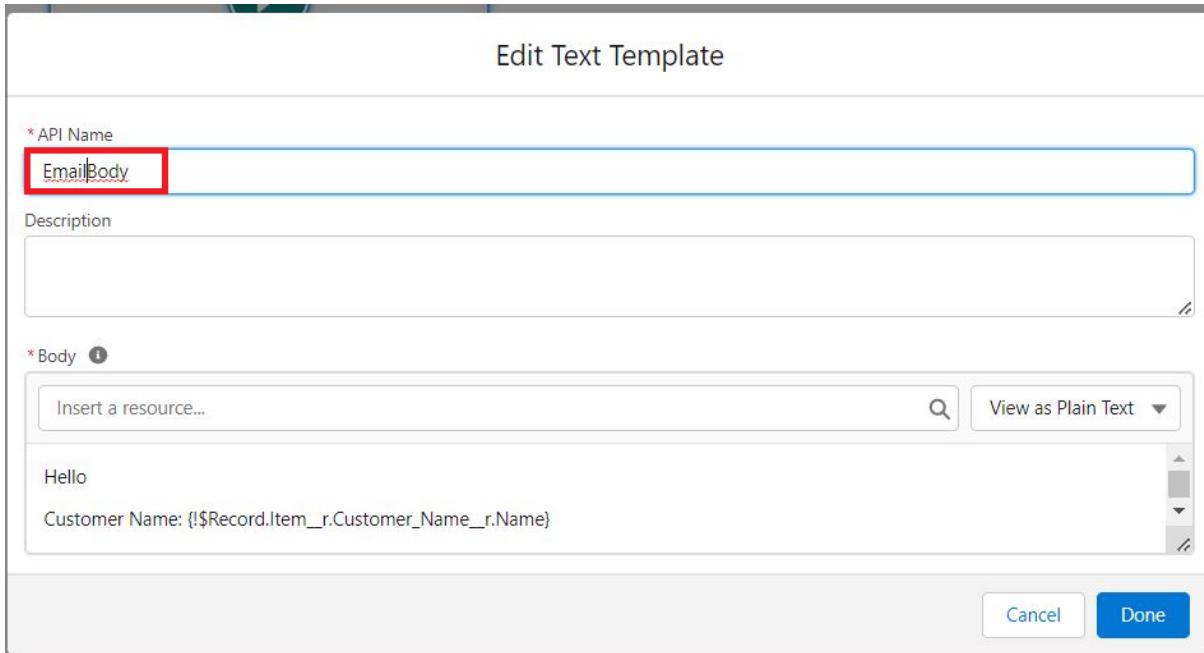
Condition Requirements

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





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



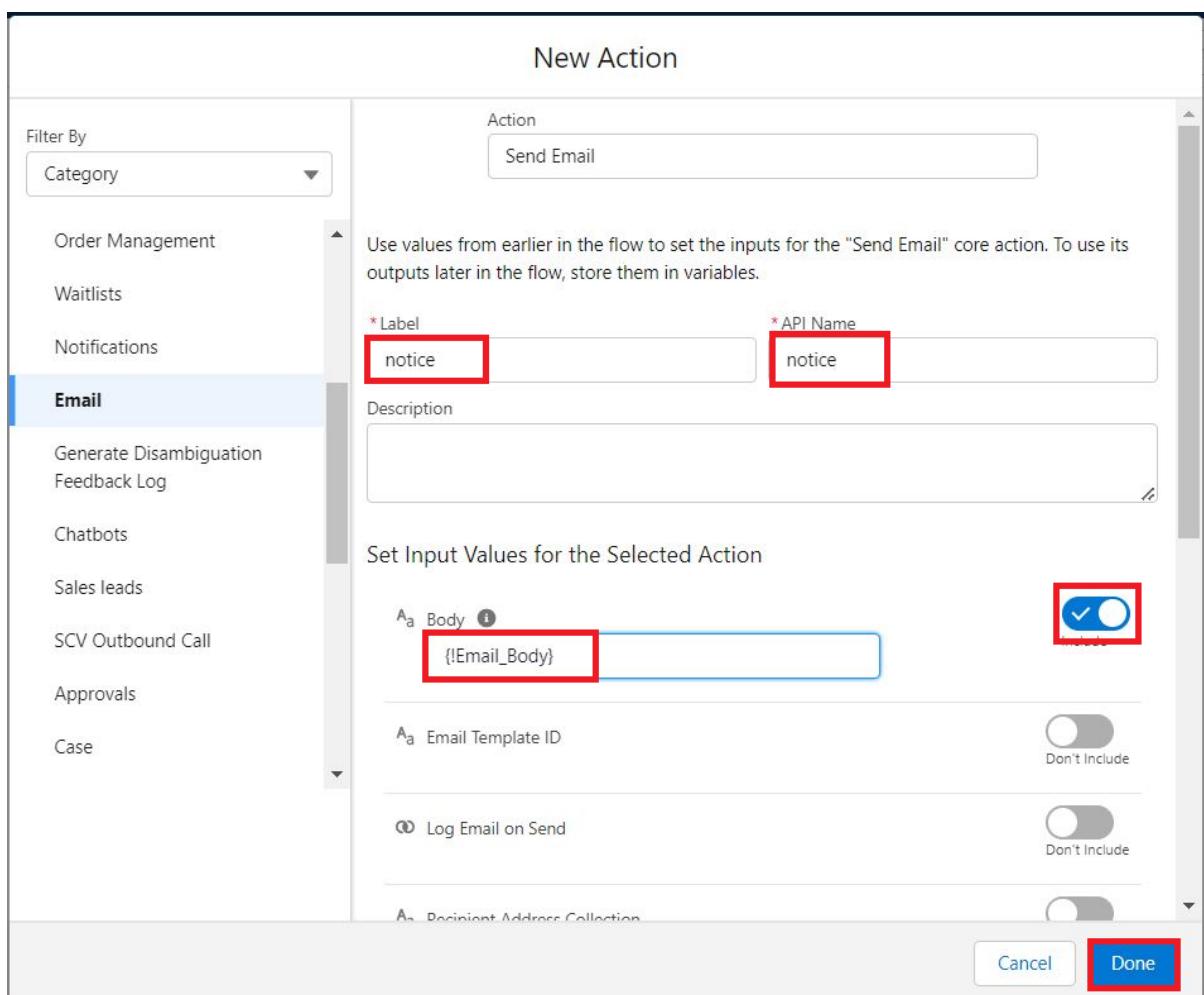
10. Change the view as Rich Text ? View to Plain Text.

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

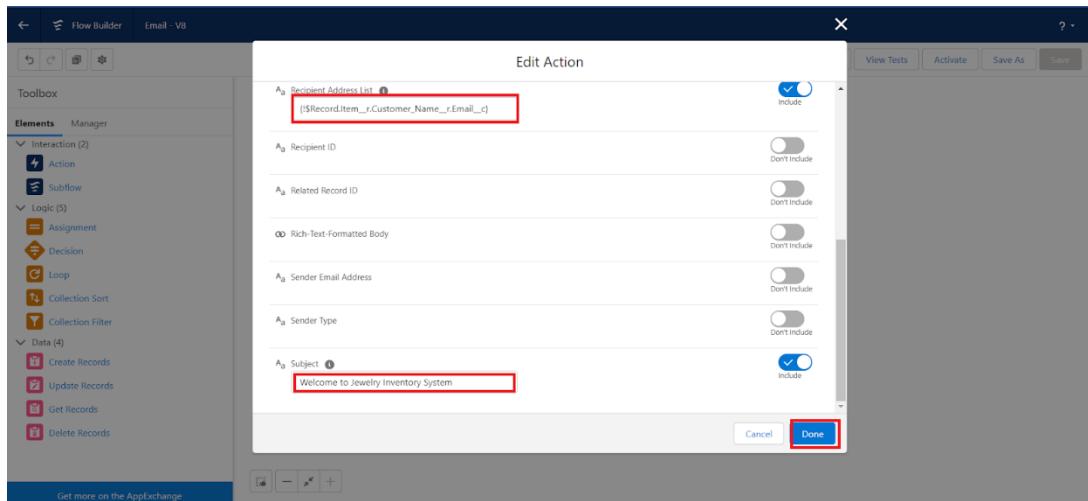
- Hello
- Customer Name: {!\$Record.Item__r.Customer_Name__r.Name}
- Here are the details for the item you purchased with Jewellery Inventory System
- Item Type: {!\$Record.Item__r.Item_Type__c}
- Ornament: {!\$Record.Ornament__c}
- Weight: {!\$Record.Weight__c} grams

Amount: {!\$Record.Amount_c}

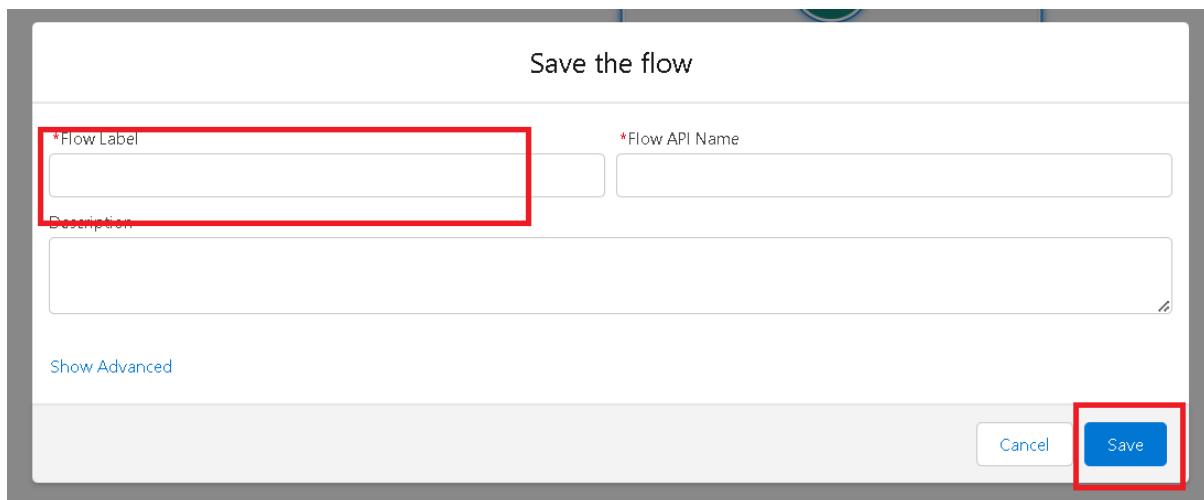
12. Click done.
13. Now click on elements, and drag the action element into the preview pane.
14. Their action bar will be opened in that search for “ send email ” and click on it.
15. Give the label name as “ notice”
16. API name will be auto populated.
17. Enable the body in set input values for the selected action.
18. Select the text template that was created.

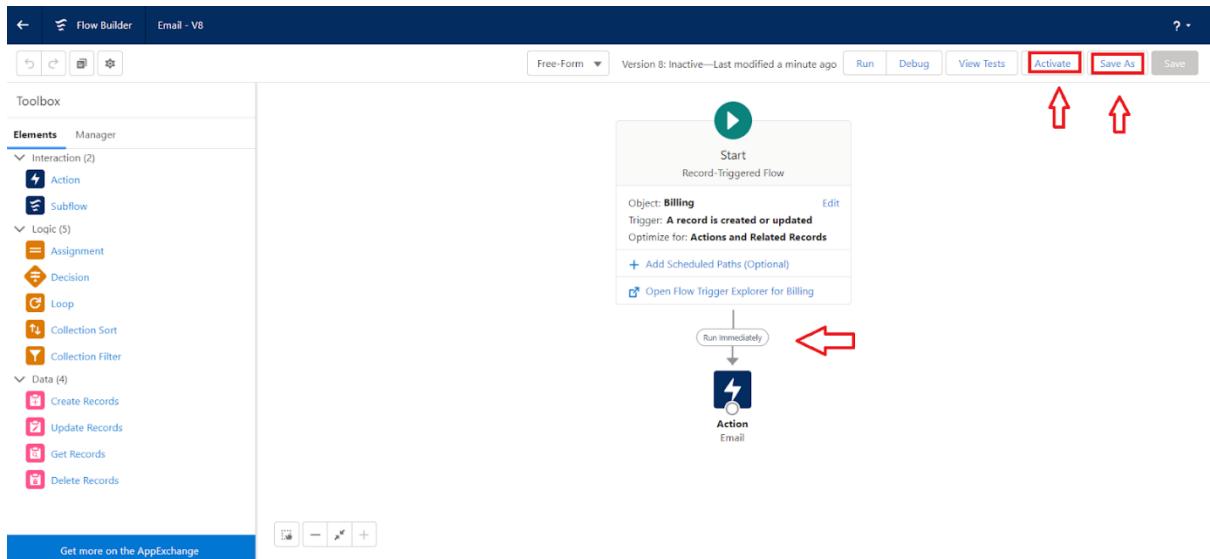


19. Include Recipient Address list, select the email from the record.
({!!\$Record.Item_r.Customer_Namer.Email_c})
20. Include the subject as “Welcome to Jewelry Inventory System ”.
21. Click done.



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.





18.CONCLUSION

- From a developer's perspective, building a **CRM Application for Jewel Management** provides immense value by streamlining customer relations, automating sales processes, and integrating inventory with client data. It empowers jewel businesses with personalized services, secure data handling, and data-driven decision-making. However, the development process also comes with challenges such as high customization demands, integration complexities, security concerns, and ongoing maintenance.
- Overall, a well-designed CRM for jewel management can serve as a **powerful technological bridge** between jewelers and customers, enhancing business efficiency and customer satisfaction. For developers, it offers both **opportunities to innovate** in a niche industry and **responsibilities to ensure reliability, security, and scalability** of the solution.

For the overview of the project,

- I. **Salesforce Login:** [Login | Salesforce](https://login.salesforce.com)
- II. **Smartintenz Task Space:** <https://nme.smartinternz.com/>

