

CRM Application for Jewel Management - (Developer)

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1.INTRODUCTION

1.1 Project Overview

This project involves the development of a customized **Salesforce CRM application** tailored for jewelry businesses to manage their end-to-end operations, including customer relationship management, sales tracking, inventory management, and repair workflows. The system improves operational efficiency, enhances customer engagement, and provides detailed reporting and dashboards to support business decision-making.



1.2 Purpose

The main objective of the project is to develop a specialized CRM solution on Salesforce for managing the unique workflows of a jewelry business. It focuses on organizing customer information, tracking inventory and sales, and managing repair or custom orders efficiently.

DEVELOPMENT PHASE

Creating Developer Account:

By using this URL - <https://developer.salesforce.com/signup>

The screenshot shows the sign-up page for the Salesforce Developer Edition. The background is dark blue with white text. On the left, there's a large white cloud icon with the word "salesforce" inside it. Below the icon, the text reads: "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Underneath that, it says "Sign up for your Developer Edition." followed by a bulleted list of features. On the right, there's a white sign-up form with fields for First name (shreya), Last name (prakash), Job title (salesforce), Work email (23bcashreyaprakash@gmail.com), Company (salesforce), and Country/Region (India). At the bottom, there's a checkbox for agreeing to the Main Services Agreement and Program Agreement, with a note that the org may be provisioned on Hyperforce.

Sign up for your Developer Edition
A free Salesforce Platform environment with Agentforce and Data Cloud

First name shreya ✓ Last name prakash ✓

Job title salesforce ✓ Work email 23bcashreyaprakash@gmail.com

Company salesforce ✓ 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;

Created objects:

Jewel Customer, Item, Customer Order, Price, Billing.

The screenshot shows the 'Object Manager' section of the Salesforce setup. The object being viewed is 'Jewel Customer'. The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main 'Details' tab displays the following information:

Setting	Value
Description	[Empty]
API Name	Jewel_Customer__c
Custom	✓
Singular Label	Jewel Customer
Plural Label	Jewel Customers
Enable Reports	✓
Track Activities	[Empty]
Track Field History	[Empty]
Deployment Status	Deployed
Help Settings	[Empty]
Standard salesforce.com Help Window	[Empty]

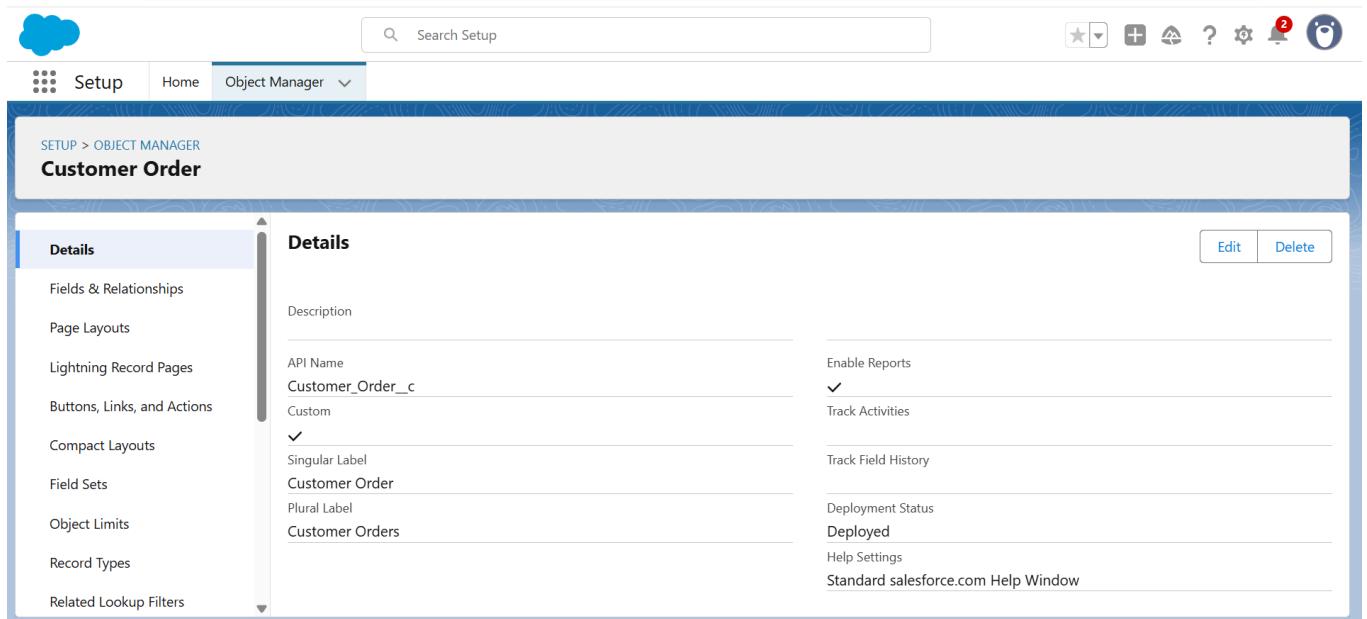
At the bottom right are 'Edit' and 'Delete' buttons.

The screenshot shows the 'Object Manager' section of the Salesforce setup. The object being viewed is 'Item'. The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main 'Details' tab displays the following information:

Setting	Value
Description	[Empty]
API Name	Item__c
Custom	✓
Singular Label	Item
Plural Label	Items
Enable Reports	✓
Track Activities	[Empty]
Track Field History	[Empty]
Deployment Status	Deployed
Help Settings	[Empty]
Standard salesforce.com Help Window	[Empty]

At the bottom right are 'Edit' and 'Delete' buttons.

← → ⌂ orgfarm-91d1f169d9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xd6P/Details/view

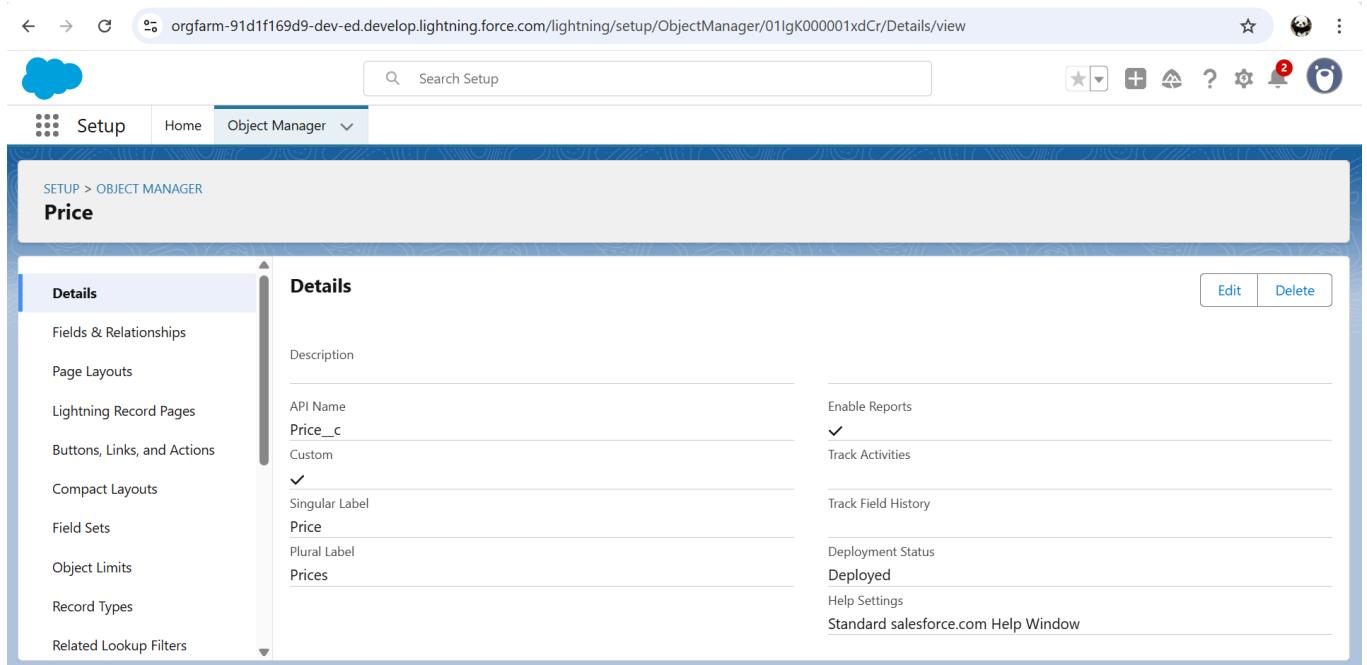


The screenshot shows the Salesforce Setup Object Manager interface for the 'Customer Order' object. The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main 'Details' tab displays the following settings:

Description	
API Name	Customer_Order__c
Custom	✓
Singular Label	Customer Order
Plural Label	Customer Orders
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the top right of the details panel are 'Edit' and 'Delete' buttons.

← → ⌂ orgfarm-91d1f169d9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xdCr/Details/view



The screenshot shows the Salesforce Setup Object Manager interface for the 'Price' object. The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main 'Details' tab displays the following settings:

Description	
API Name	Price__c
Custom	✓
Singular Label	Price
Plural Label	Prices
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the top right of the details panel are 'Edit' and 'Delete' buttons.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "SETUP > OBJECT MANAGER" followed by "Billing". On the left, a sidebar lists various configuration options under "Details": Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area displays the "Details" section for the "Billing" object. It includes fields for Description, API Name (set to "Billing__c"), Singular Label (set to "Billing"), Plural Label (set to "Billings"), and several checkboxes: "Enable Reports" (checked), "Track Activities" (unchecked), "Track Field History" (unchecked), and "Deployment Status" (set to "Deployed"). At the bottom right are "Edit" and "Delete" buttons.

- Created Custom tabs

The screenshot shows the Salesforce Custom Tabs page. The top navigation bar includes links for Setup, Home, and Object Manager. A search bar at the top has "tabs" typed into it. The main content area features a "Custom Tabs" section with a sub-header "Custom Object Tabs". Below this is a table listing five custom object tabs:

Action	Label	Tab Style	Description
Edit Del	Billings	Cup	
Edit Del	Customer.Orders	Bottle	
Edit Del	Items	Balls	
Edit Del	Jewel.Customers	Box	
Edit Del	Prices	Dice	

- Developed Lightning App with relevant tabs

orgfarm-91d1f169d9-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

New Lightning App

App Details

* App Name * Developer Name Description

App Branding

Image Primary Color Hex Value

Org Theme Options Use the app's image and color instead of the org's custom theme

Next

External Client Apps	8	Content	Content	Salesforce CRM Content	8/27/2025, 5:26 PM	Classic
	9	Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	8/27/2025, 5:26 PM	Lightning
OAuth Usage						

orgfarm-91d1f169d9-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

New Lightning App

Available Items

Type to filter list...

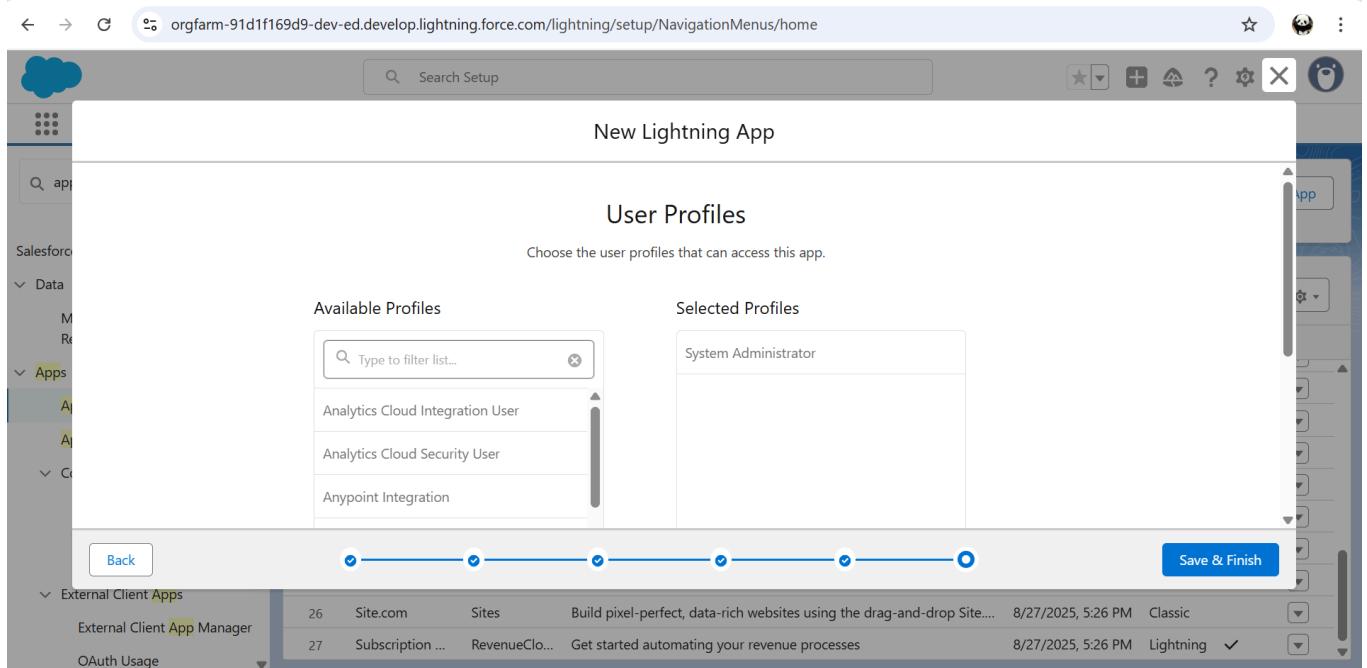
-
-
-
-
-
-

Selected Items

-
-
-
-
-
-
-

Back Next

External Client Apps	26	Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site...	8/27/2025, 5:26 PM	Classic
	27	Subscription ...	RevenueClo...	Get started automating your revenue processes	8/27/2025, 5:26 PM	Lightning
OAuth Usage						



- Created fields and relationships

orgfarm-91d1f169d9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xYrV/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Jewel Customer

Details Fields & Relationships 11 Items, Sorted by Field Label

FIELD LABEL FIELD NAME DATA TYPE CONTROLLING FIELD INDEXED

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City_c	Text(20)		
Country	Country_c	Text(18)		
Created By	CreatedById	Lookup(User)		
Customer name	Name	Text(80)		✓
Email	Email_c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		

orgfarm-91d1f169d9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xYrV/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Jewel Customer

Details Fields & Relationships 11 Items, Sorted by Field Label

FIELD LABEL FIELD NAME DATA TYPE

FIELD LABEL	FIELD NAME	DATA TYPE
Email	Email_c	Email
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Phone	Phone_c	Phone
State	State_c	Text(20)
Street	Street_c	Text(20)
Zip/Postal code	Zip_Postal_code_c	Text(6)

orgfarm-91d1f169d9-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xZNI/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Item

Details

Fields & Relationships

24 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Created By	CreatedBy	Lookup(User)		
Customer Name	Customer_Name_c	Lookup(Jewel Customer)		✓
Expected Days Of Return	Expected_Days_Of_Return_c	Picklist	Priority	
Gold Price	Gold_Price_c	Formula (Currency)		
Item Id	Name	Auto Number		✓

orgfarm-91d1f169d9-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xZNI/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Item

Details

Fields & Relationships

24 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Purity Gold Price	Purity_Gold_Price_c	Formula (Currency)		
Record Type	RecordTypeId	Record Type		✓
Silver Price	Silver_Price_c	Formula (Number)		
Stone Weight	Stone_Weight_c	Number(5, 5)		
Stone/Other Price	Stone_Other_Price_c	Currency(8, 2)		
Total Weight	Total_Weight_c	Formula (Number)		
Weight	Weight_c	Number(8, 5)		

← → ⌂ orgfarm-91d1f169d9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xd6P/FieldsAndRelationships/view



Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Customer Order

Details Fields & Relationships

Fields & Relationships

Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters

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

← → ⌂ orgfarm-91d1f169d9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xdCr/FieldsAndRelationships/view



Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Price

Details Fields & Relationships

Fields & Relationships

Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters

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

orgfarm-91d1f169d9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xdG5/FieldsAndRelationships/view

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Billing Name	Name	Auto Number		✓
Created By	CreatedBy	Lookup(User)		
Gold/Silver Price	Gold_Silver_Price__c	Formula (Currency)		
Item	Item__c	Lookup(Item)		✓
KDM Charge	KDM_Charge__c	Formula (Currency)		

orgfarm-91d1f169d9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xdG5/FieldsAndRelationships/view

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Paid Amount	Paid_Amount__c	Currency(18, 0)		
Paying Amount	Paying_Amount__c	Currency(18, 0)		
Stone weight	Stone_weight__c	Formula (Number)		
Stones/other price	Stones_other_price__c	Formula (Currency)		
Total Amount	Total_Amount__c	Formula (Currency)		
Weight	Weight__c	Formula (Number)		

- Schema Builder

- Created Validation rule

The screenshot shows the 'Validation Rule Edit' screen in the Salesforce Setup. The URL is <https://orgfarm-91d1f169d9-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xYrV/ValidationRules/03dgK000000O8E9/edit>. The page title is 'Jewel Customer'. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area contains fields for 'Validation Rule Edit': 'Name' (ValidationRule_For_JewelCustomerObject), 'Active' (checked), and 'Description'. Below this is the 'Error Condition Formula' section, which includes an example ('Discount_Percent_c>0.30'), a 'More Examples...' link, and a note about displaying an error if the formula is true. A formula editor shows the condition: 'OR(ISBLANK(City__c), ISBLANK(Country__c), ISBLANK(Phone__c), ISBLANK(State__c), ISBLANK(Street__c))'. To the right of the formula editor is a 'Functions' dropdown menu listing various mathematical and logical functions such as ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. A 'Quick Tips' box is also visible.

Profile

The screenshot shows the 'Clone Profile' screen in the Salesforce Setup. The URL is <https://orgfarm-91d1f169d9-dev-ed.lightning.force.com/lightning/setup/Profiles/clone>. The page title is 'Profiles'. On the left, a sidebar shows navigation links for Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (with sub-links for Users, Permission Set Groups, Permission Sets, Profiles, and Public Groups). The main area has a 'Clone Profile' header and a note: 'Enter the name of the new profile.' Below this is a form with a required field: 'You must select an existing profile to clone from.' The form fields are: 'Existing Profile' (dropdown set to 'System Administrator'), 'User License' (dropdown set to 'Salesforce'), and 'Profile Name' (text input field containing 'Gold Smith'). At the bottom are 'Save' and 'Cancel' buttons.

SETUP Profiles

Custom Object Permissions

	Basic Access					Data Administration	
	Read	Create	Edit	Delete	View All	Modify All	
Assets	<input type="checkbox"/>						
Asset Services	<input type="checkbox"/>						
Billings	<input checked="" type="checkbox"/>						
Book1	<input type="checkbox"/>						
Book2	<input type="checkbox"/>						
Bot Commands	<input type="checkbox"/>						
Brokers	<input type="checkbox"/>						
Buyers	<input type="checkbox"/>						
Candidates	<input type="checkbox"/>						
Customer Orders	<input checked="" type="checkbox"/>						
Items	<input checked="" type="checkbox"/>						
Jewel Customers	<input checked="" type="checkbox"/>						
Job Applications	<input type="checkbox"/>						
Job Postings	<input type="checkbox"/>						
Job Posting Sites	<input type="checkbox"/>						
Positions	<input type="checkbox"/>						
Prices	<input checked="" type="checkbox"/>						
Projects	<input type="checkbox"/>						
ProjectTasks	<input type="checkbox"/>						
Properties	<input type="checkbox"/>						

Inbox (566) - priyaa10052005@... - Student - relationcom759-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eQy00000Gknmz%2Fe%3FretURL%3D%252F... Profiles | Salesforce

Cloud icon, Search Setup, Home, Object Manager, Setup, Profiles, Help for this Page, Help icon.

Profiles search bar: profiles

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

Profiles: Profile Edit Worker

Profile Edit Worker

Name: Worker, User License: Salesforce Platform, Description: (empty), Custom Profile: checked.

Custom App Settings:

	Visible	Default		Visible	Default
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input type="radio"/>	Platform (standard_Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (App_launcher)	<input type="checkbox"/>	<input type="radio"/>	WDC (standard_Work)	<input type="checkbox"/>	<input type="radio"/>

System tray icons: Search, Microsoft Edge, File Explorer, Task View, Taskbar, Network, Battery, ENG IN, 07:11 PM, 17-09-2025.

- Gold smith profile and work profile created.

- Role

The screenshot shows the Salesforce Setup interface under the 'Roles' section. A new role named 'Gold Smith' is being created. The 'Label' field contains 'Gold Smith', the 'Role Name' field contains 'Gold_Smith', and the 'This role reports to' dropdown is set to 'CEO'. The 'Role Name as displayed on reports' field also contains 'Gold Smith'. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

Creating the Role Hierarchy

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

The screenshot shows the 'Your Organization's Role Hierarchy' page. The 'Meghana' node has expanded to show its children: 'CEO', 'CFO', 'COO', 'Gold Smith', 'Worker', 'HR', 'Manager', 'SVP, Customer Service & Support', and 'SVP, Human Resources'. The 'Gold Smith' node is highlighted with a red box. The 'Add Role' button is visible next to each node.

- Goldsmith role created.

User Edit
Niklaus Mikaelson

General Information

First Name: Niklaus
Last Name: Mikaelson
Alias: nmika
Email: nadeem@thesmarbridge.co.in
Username: nicklause@nick.org
Nickname: nicklaus
Title:
Company:
Department:
Division:

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

Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
Site.com Publisher User:
WDC User:
Data.com User Type: --None--
Data.com Monthly Addition Limit: 300
Accessibility Mode (Classic Only): ⓘ
High-Contrast Palette on Charts: ⓘ
Load Lightning Pages While Scrolling: ⓘ
Debug Mode:
Send Apex Warning Emails:

User Edit
priya dharshini

General Information

First Name: priya
Last Name: dharshini
Alias: pdhar
Email: priyaa10052005@gmail.com
Username: priyaa10052005@gmail.com
Nickname: priyaa
Title:
Company:
Department:
Division:

Role: Worker
User License: Salesforce Platform
Profile: Worker
Active:

Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
Site.com Publisher User:
WDC User:
Data.com User Type: --None--

The screenshot shows the Salesforce Setup interface for managing users. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'User Edit' for the user 'abi kumar'. The 'General Information' section contains fields for First Name (abi), Last Name (kumar), Alias (akuma), Email (priyaa10052005@gmail.com), Username (pria10052005@gmail.com), Nickname (abisheck), Title, Company, Department, and Division. To the right of these fields are dropdown menus for Role (Worker), User License (Salesforce Platform), Profile (Worker), and Active status (checked). Other checkboxes include Marketing User, Offline User, Knowledge User, Flow User, and Service Cloud User. A 'Save' button is at the top right of the edit form.

- User Created.

Gold page layout

This screenshot shows the 'Page Layout Assignment' screen for the 'Item' object. The top navigation bar has 'SETUP > OBJECT MANAGER' and the 'Item' icon. The left sidebar shows 'Page Layouts' selected. The main content displays a table for 'Page Layouts' with one item: 'Item Layout' created by 'meghana katoju' on 6/29/2023. A red box highlights the 'New' button at the top right of the table header.

This screenshot shows the 'Create New Page Layout' dialog for the 'Item' object. The top navigation bar has 'SETUP > OBJECT MANAGER' and the 'Item' icon. The left sidebar shows 'Page Layouts' selected. The main content is titled 'Create New Page Layout' with a note about cloning layouts. It has two input fields: 'Existing Page Layout' (set to 'Item Layout') and 'Page Layout Name' (set to 'Page Layout for Gold'). A red box highlights the 'Page Layout Name' field.

The screenshot shows the Salesforce Page Layout editor for an 'Item' object. The left sidebar lists various layout categories: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules.

The main area displays the Page Layout configuration. At the top, there's a toolbar with Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties buttons. Below the toolbar is a 'Fields' section containing a table with columns: Section, Customer Name, Item Type, Ornament, Priority, Silver price, and Weight. A 'Quick Find' field is also present. A yellow callout box highlights the 'Purity' field, showing its properties: Label: Purity, Name: Purity, Type: Number, Length: 2, and Decimal Places: 0. A note at the bottom right says 'This item is currently in use (click to locate)'.

The main content area is a large red-bordered box containing the 'Information' section. This section includes fields like Item Id (GEN-2004-001234), Customer Name (Sample Text), Prices (Sample Text), Item Type (Sample Text), Ornament (Sample Text), Gold price (₹123.45), Purity Gold price (₹123.45), Weight (0.06252), Purity (46), Percentage (25), Stone weight (0.80909), Total weight (92.398), Stone/other price (₹123.45), Amount (₹123.45), KDM (₹123.45), and Making Charges (₹123.45).

Silver page layout

This screenshot shows the same Page Layout editor interface for the 'Item' object, but it displays the Gold page layout. The left sidebar and toolbar are identical to the Silver layout.

The main content area is a large red-bordered box containing the 'Information' section. This section includes fields like Item Id (GEN-2004-001234), Customer Name (Sample Text), Prices (Sample Text), Item Type (Sample Text), Ornament (Sample Text), Silver price (₹123.45), Weight (0.70090), Stone weight (0.75636), Total weight (26.379), Percentage (99), Amount (₹123.45), KDM (₹123.45), and Making Charges (₹123.45).

- Gold and Silver layout created.

SETUP > OBJECT MANAGER

Item

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types 
Related Lookup Filters

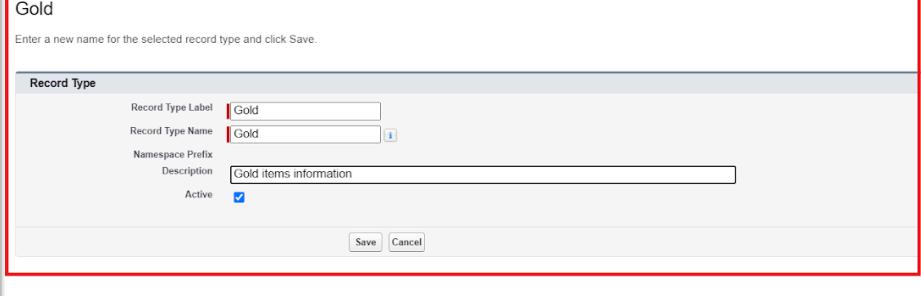
Quick Find New Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	meghana katoju, 7/18/2023, 11:45 AM
Silver	Silver items information	✓	meghana katoju, 7/18/2023, 11:45 AM

Setup Home Object Manager

SETUP > OBJECT MANAGER

Item

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

Help for this Page 

Required Information

Edit Record Type Gold

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

Record Type

Record Type Label	Gold
Record Type Name	Gold
Namespace Prefix	
Description	Gold items information
Active	<input checked="" type="checkbox"/>

Save Cancel

Profile Name Record Types Currently Available 

Profile Name	Record Types Currently Available	Make Available	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"/>

Setup > OBJECT MANAGER

Item

Record Type	Description	Access Level		
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			<input 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	Gold (Default), Silver		<input type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	Gold (Default), Silver		<input type="checkbox"/>	<input type="checkbox"/>

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 ▾

- Record type created.

Salesforce Setup interface showing the Permission Sets page.

Setup tab is selected.

Permission Sets link is highlighted with a red box.

Permission Sets section header.

Help for this Page link.

Users section with **Permission Sets** link highlighted with a red box.

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

Table of existing permission sets:

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Adding_Employee	Allows access to the store. Lets users see products and categories, ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer	Includes all Buyer capabilities, and allows access to manage carts a...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	CRM User	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Commerce Admin	Manage Service Cloud Voice contact centers that use Amazon Conn...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Admin	Access agent features in Service Cloud Voice contact centers that u...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent		

New button.

Clone: Per to Worker dialog box:

Enter new label and description for the cloned permission set.

Help for this Page link.

Enter permission set information:

- Label:** Per to Worker (highlighted with a red box)
- API Name:** Per_to_Worker (highlighted with a red box)
- Description:** (empty text area)
- Session Activation Required:** (highlighted with a red box)
- License:** (empty text area)

Save and Cancel buttons.

Apps

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

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

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

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

Per to Worker

Select Users to Assign

All Users ▾

Full Name ↑	Alias	Username	Role	Acti...	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 type="checkbox"/> Worker	<input checked="" type="checkbox"/>	<input 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

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

Per to Worker

Select an Expiration Option For Assigned Users

No expiration date ⓘ

Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date Time Zone 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

- Permission set created.

Trigger handler class

```
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;
    }
}
}

```

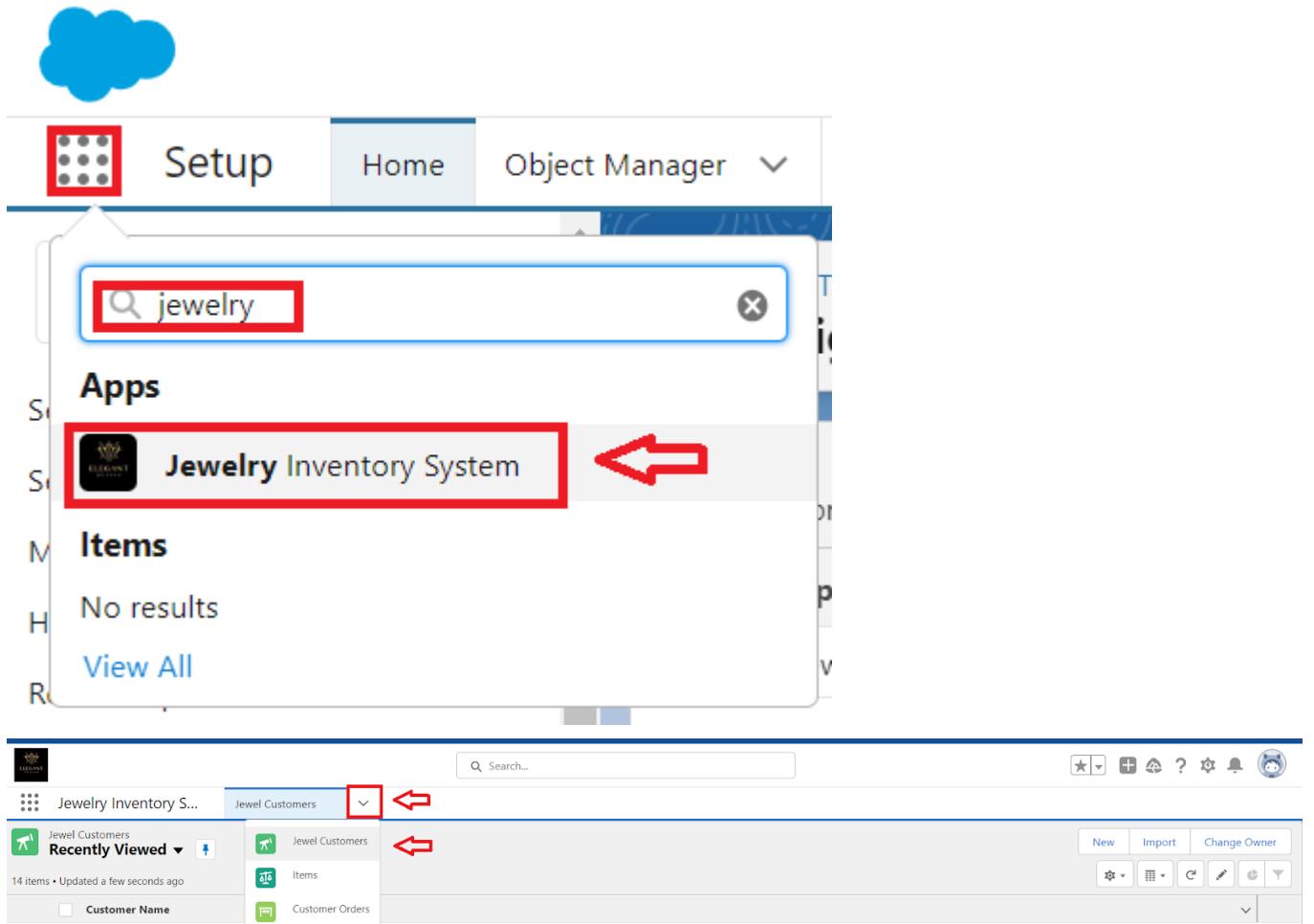
Trigger

```

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

```

User Adoption



- Created record.

Create reports

The screenshot shows the Jewelry Inventory Software interface. On the left, there's a sidebar with categories like Reports, Recent, Folders, and Favorites. Under Reports, 'Recent' is selected, showing items such as 'New Report billing w/order', 'New Items with Billin...', 'New Prices Report', and 'Days on Market'. A red box highlights the 'Reports' button in the sidebar. The main area displays a list of reports with columns for Folder, Created By, Created On, and Subscribed status. A search bar at the top right allows searching for recent reports.

This screenshot is nearly identical to the one above, showing the same sidebar and report list. The 'Reports' button in the sidebar is highlighted with a red box. The main report list shows various entries, including 'Private Reports' and 'DreamHouse Reports'.

The screenshot shows the 'Report Builder' dialog box. It has a title 'Create Report' and a 'Select a Report Type' section. In the search bar, 'C PRICE' is typed, with a red arrow pointing to it. Below the search bar, 'Prices' is listed in the results, also with a red arrow pointing to it. To the right, there are sections for 'Report Type Name' (set to 'Price Books with Products') and 'Category' (set to 'Standard').

The screenshot shows two views of a report builder interface. The top view displays the 'Outline' section where users can define groups and columns. The bottom view shows the 'Preview' section where the report's output is displayed as a table.

Outline Section (Top View):

- Groups:** Contains a 'GROUP ROWS' item with an 'Add group...' button.
- Columns:** Contains three items: 'Price: Price' (highlighted with a red box), '# Gold price', and '# Silver price'.
- Preview Message:** 'To see the latest edits, refresh the preview. Refresh.'
- Buttons:** 'Update Preview Automatically' switch (off).

Preview Section (Bottom View):

- Message:** 'Previewing a limited number of records. Run the report to see everything.'
- Table Headers:** 'Price: Price', 'Gold price', 'Silver price'.
- Data Rows:**

	Price: Price	Gold price	Silver price
1	p-022	₹60,000.00000	₹71,000.00000
2	p-021	₹63,000.00000	₹72,000.00000
3	p-027	₹62,350.00000	₹70,200.00000
4	p-029	₹58,700.00000	₹69,000.00000
5	p-030	₹66,000.00000	₹78,000.00000
6	p-026	₹62,000.00000	₹70,000.00000
7	p-025	₹58,000.00000	₹69,000.00000
8	p-028	₹59,900.00000	₹73,000.00000
9	p-024	₹62,000.00000	₹73,000.00000
10	p-023	₹58,000.00000	₹69,000.00000
11		₹609,950.00000	₹714,200.00000
- Buttons:** 'Update Preview Automatically' switch (off).

- Reports Created.
- Created dashboards

New Dashboard

* Name

Dashboard 1

Description

Folder

Private Dashboards

Select Folder

Cancel

Create

Jewelry Inventory S... Dashboards Report Builder New Items with Billin... New Report billing w... Dashboard 1

Dashboard 1

New Items with Billings Report

Recent

Created by Me

Private Reports

Public Reports

All Reports

View Report

Reports

Folders

Created by Me

Shared with Me

Select Report

Search Reports and Folders...

New Report billing with items with order
meghana katoju - Jul 19, 2023, 4:34 AM - Private Reports

New Items with Billings Report
meghana katoju - Jul 19, 2023, 4:30 AM - Private Reports

New Prices Report
meghana katoju - Jul 19, 2023, 4:27 AM - Private Reports

Days on Market
meghana katoju - May 31, 2022, 11:25 PM - DreamHouse Reports

Cancel Select

Jewelry Inventory S... Dashboards Report Builder New Items with Billin... New Report billing w... Dashboard 1

Dashboard 1

New Items with Billings Report

Sum of Total weight: 92.9

Item Type

Gold

Silver

Bracelet

NECKLACE

ring

Silver Anklet

Toe ring

Ornament

New Report billing with items with order

Item: Item Id

Item-218

Item-220

Item-215

Item-222

Item-219

Item-221

Sum of Amount

Price: Price ↑

Gold price

Silver price

p-021

p-022

p-023

p-024

p-025

p-026

p-027

View Report (New Items with Billings Report)

View Report (New Report billing with items with order)

View Report (New Prices Report)

- Created flows

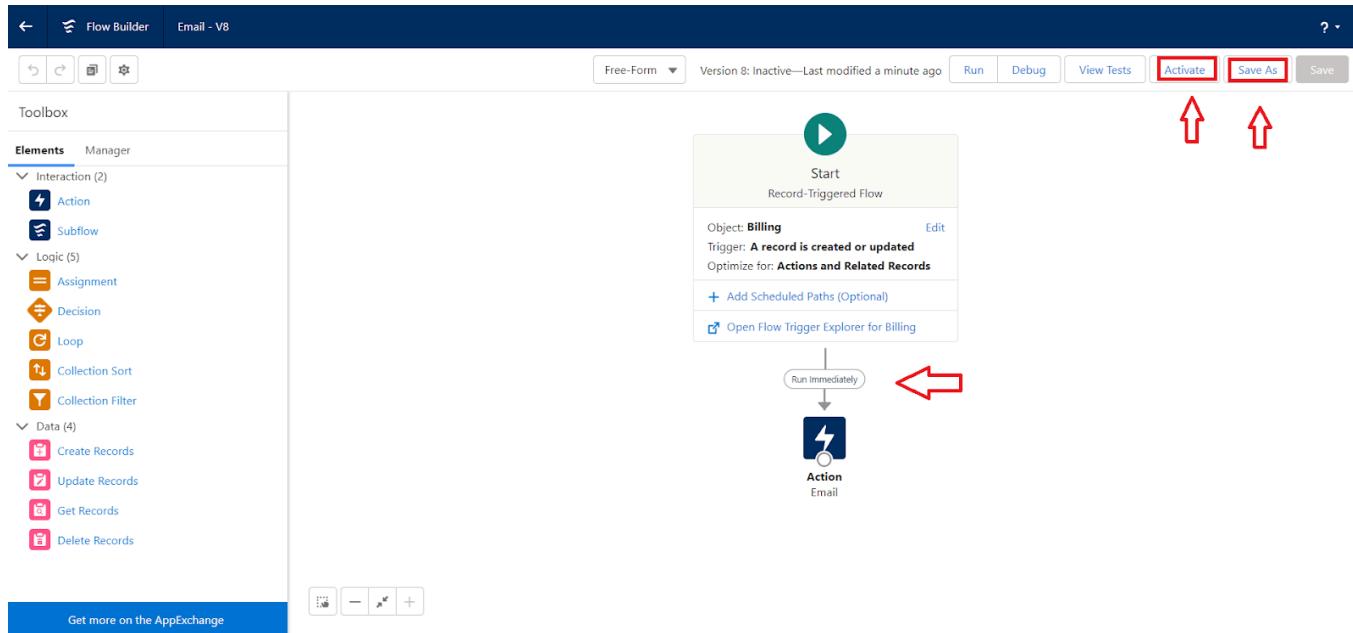
The screenshot shows two main sections of the Salesforce Setup interface:

Top Section (Setup -> Flows):

- Search bar: Q flows (1)
- Category navigation: Process Automation (1), Flows (2)
- Header: SETUP Flows
- Buttons: Flow Trigger Explorer, New Flow (3)
- Table: Flow Definitions (All Flows) showing 31 items. Columns include Flow Label, Process Type, Ac..., Te..., Package State, Pa..., Last Modified By, and Last Modified ...

Bottom Section (New Flow):

- Section title: New Flow
- Filter: Core, All + Templates
- List of flow types:
 - Screen Flow (Icon: Computer monitor)
 - Record-Triggered Flow (Icon: Database)** (1): Described as launching when a record is created, updated, or deleted. This autolaunched flow runs in the background.
 - Schedule-Triggered Flow (Icon: Clock)
 - Platform Event—Triggered Flow (Icon: Signal tower)
 - Autolaunched Flow (No Trigger) (Icon: Cogs)
 - Record-Triggered Orchestration (Icon: People)
- Action button: Create (2)



Conclusion

The CRM Application for Jewel Management streamlined customer handling, sales tracking, and inventory control for jewelry businesses. As a developer, I contributed to building a user-friendly, efficient system tailored to industry needs. The project enhanced operational efficiency and improved customer relationship management.