

CRM Application for Jewel Management

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Salesforce

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 you'll learn

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

Salesforce

Introduction

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?".

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organised something like this: <https://youtu.be/r9EX3IGde5k>

Creating Developer Account

Creating a developer org in salesforce.

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

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

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

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

Click on sign me up after filling these.

Account Activation

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.com.
Make sure to include at least:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

* New Password :
..... Good

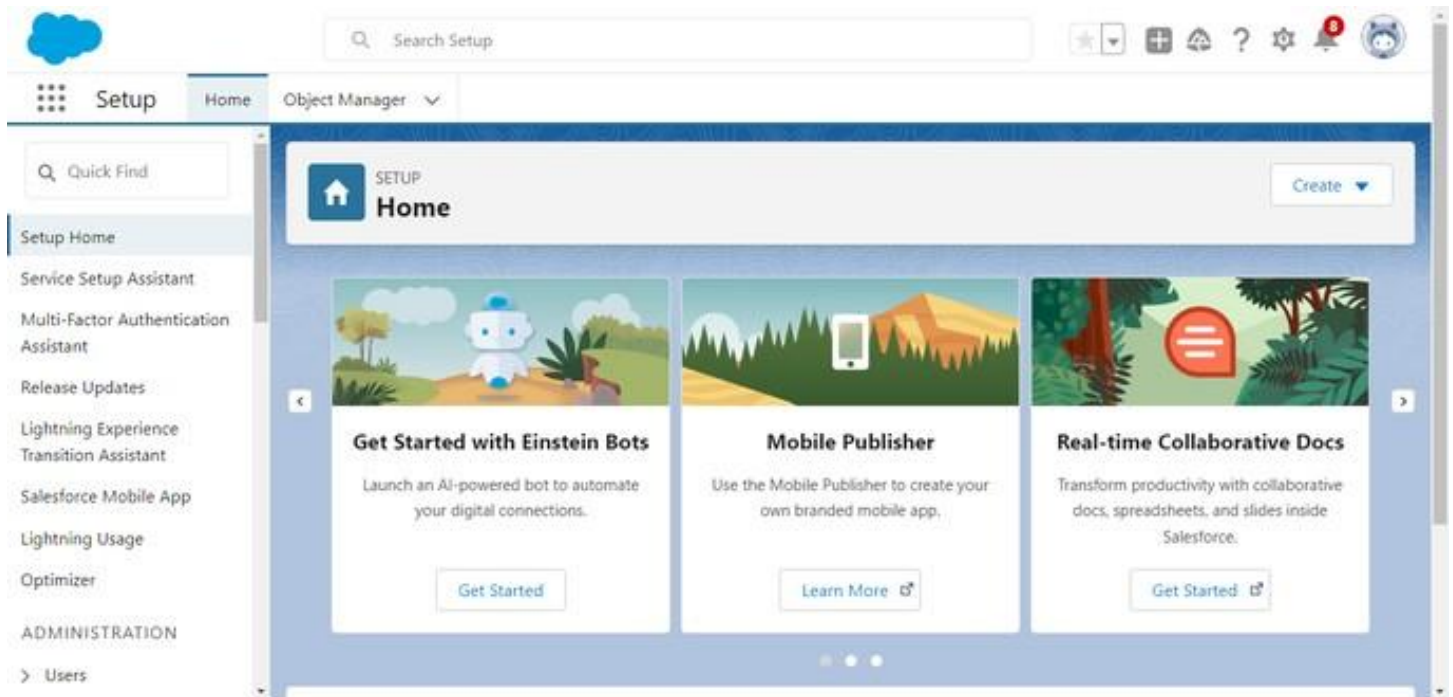
* Confirm New Password
..... Match

Security Question
= In what city were you born?

* Answer
asdfghjkl

Change Password

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



Object

What Is an Object?

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

Salesforce objects are of two types:

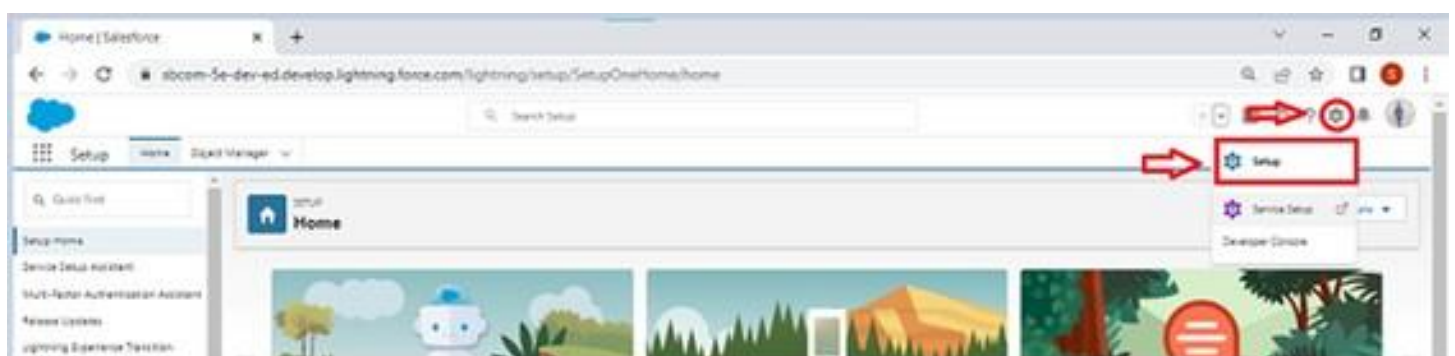
1. **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization.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

Use Case:

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

To Navigate to Setup page:

Click on gear icon >> click setup.



Create Jewel Customer Object

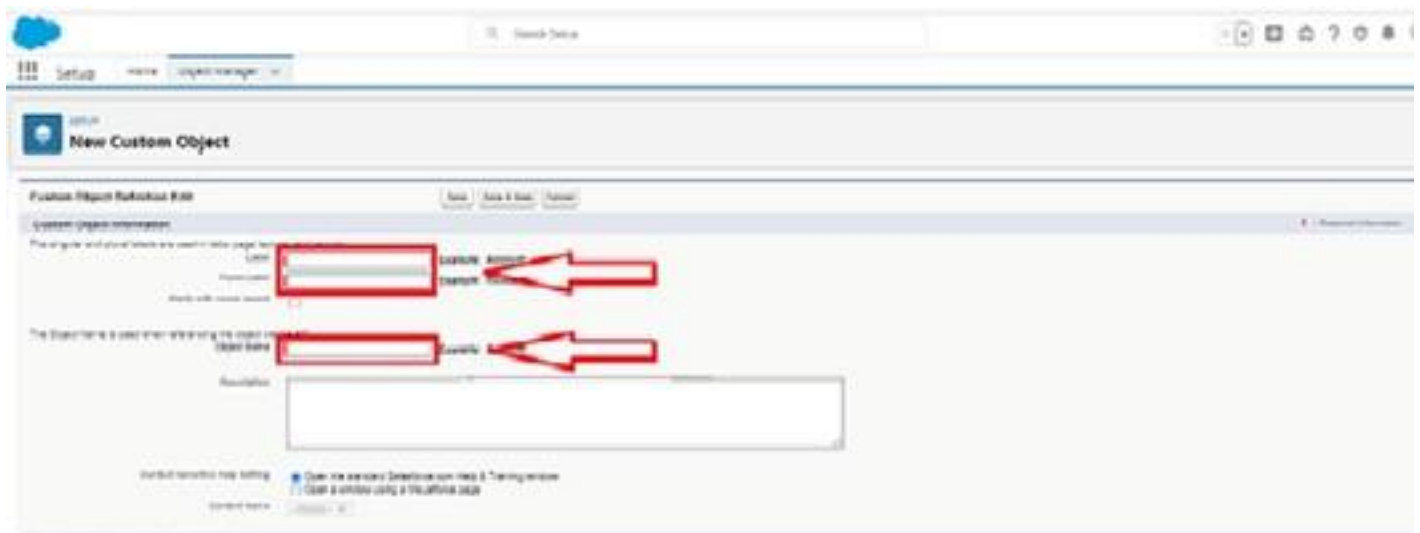
The purpose of creating a Jewel Customer custom object is to store and manage information about Customer.

To create an object:

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



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



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

Enter Record Name Label and Format

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

Record Name: Example: Account Name

Data Type:

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

1. Click on Allow reports.
2. Allow search and click Save.

Create Item Object

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

To create an object:

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

Note: Create 3 more objects with label names as Customer Order, Price, Billing

(Use "Auto Number" as a data type for Customer Order, Price, Billing).

Tabs

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

Types of Tabs:

1. Custom Tabs

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

1. Web Tabs

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

1. Visualforce Tabs

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

1. Lightning Component Tabs

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

1. Lightning Page Tabs

Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

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

Use Case:

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

Creating a Custom Tab

To create a Tab:(Customer)

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

Custom Tabs

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

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external content, such as Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation bar. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New [What Is This?](#)

No Custom Object Tabs have been defined

Web Tabs

New [What Is This?](#)

No Web Tabs have been defined

1. 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.

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Tabs' is selected under 'User Interface'. The main content area is titled 'New Custom Object Tab' and shows 'Step 1 of 3: Enter the Details'. The form includes a dropdown for 'Object' with 'None' selected, a dropdown for 'Tab Style' with 'None' selected, and a text box for 'Description'. The 'Next' button is visible at the bottom right.

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.

The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps gives users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

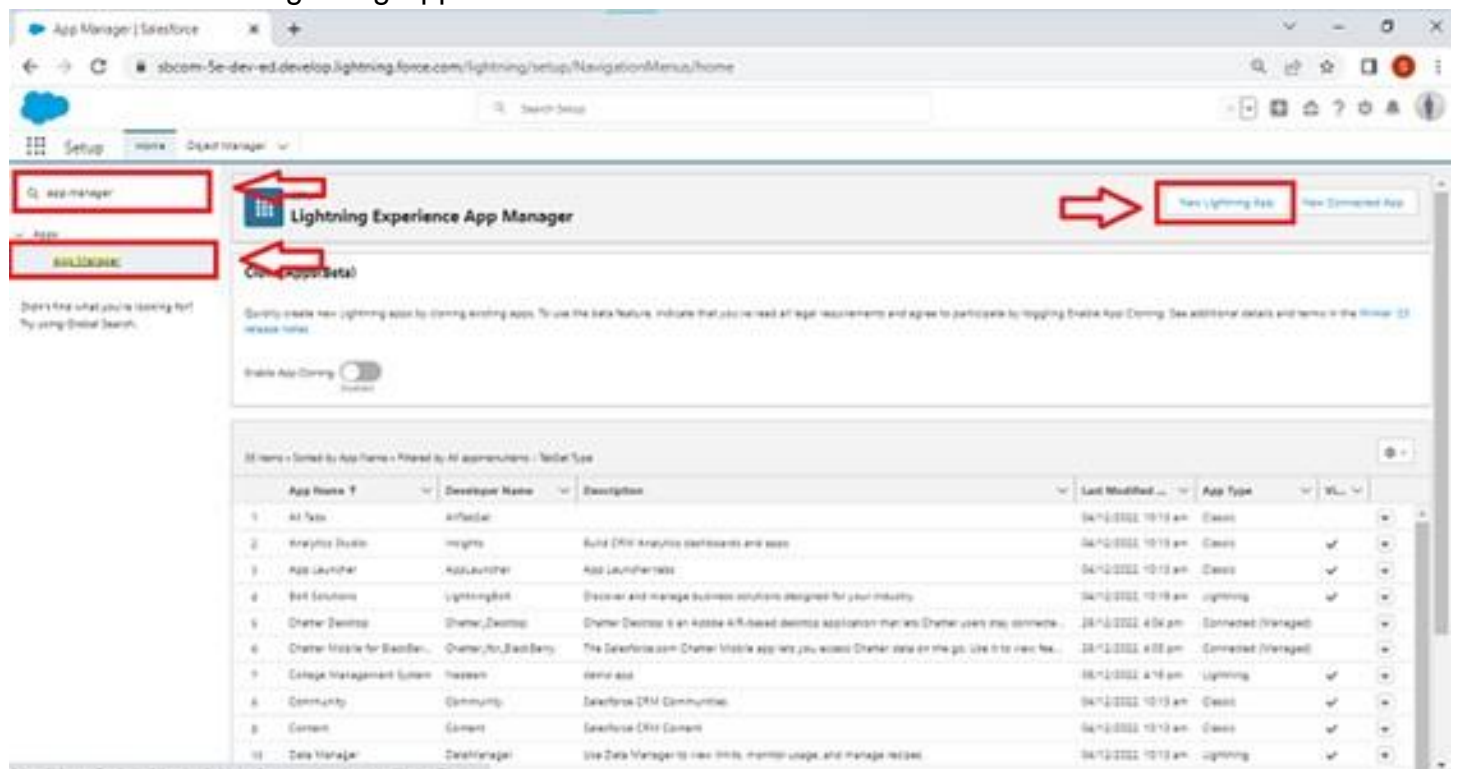
Use Case:

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

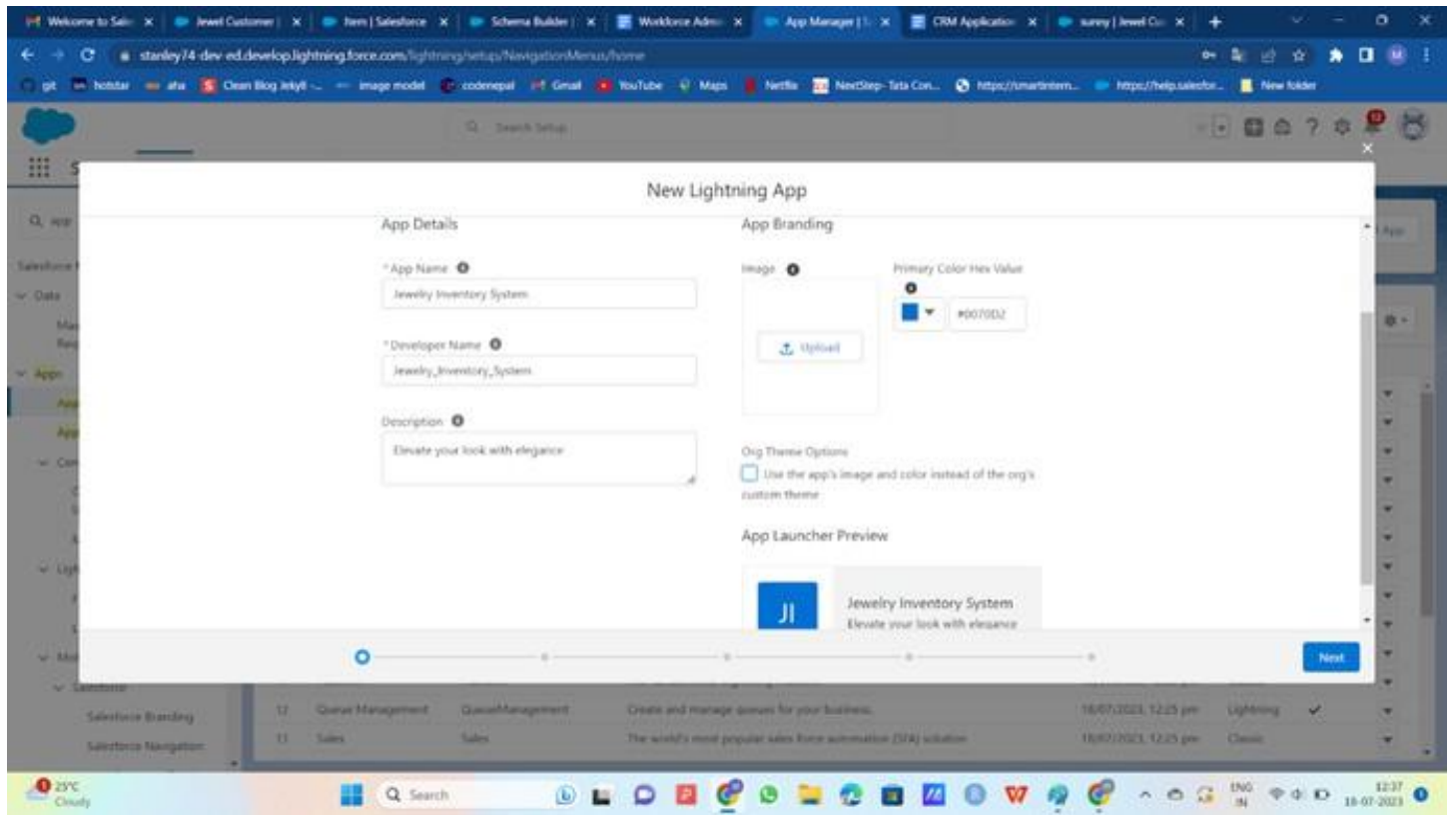
Create a Lightning App

To create a lightning app page:

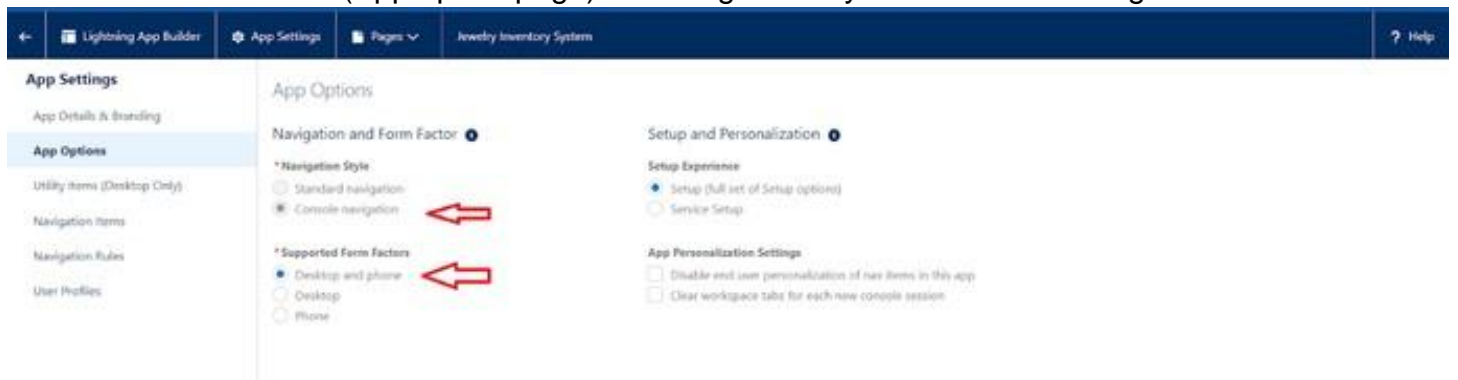
1. Go to setup page >> search “app manager” in quick find >> select “app manager” >>
2. click on New lightning App.



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 elegancel
Image : optional (if you want to give any image you can otherwise not mandatory)
Primary colour hex value : keep this default.

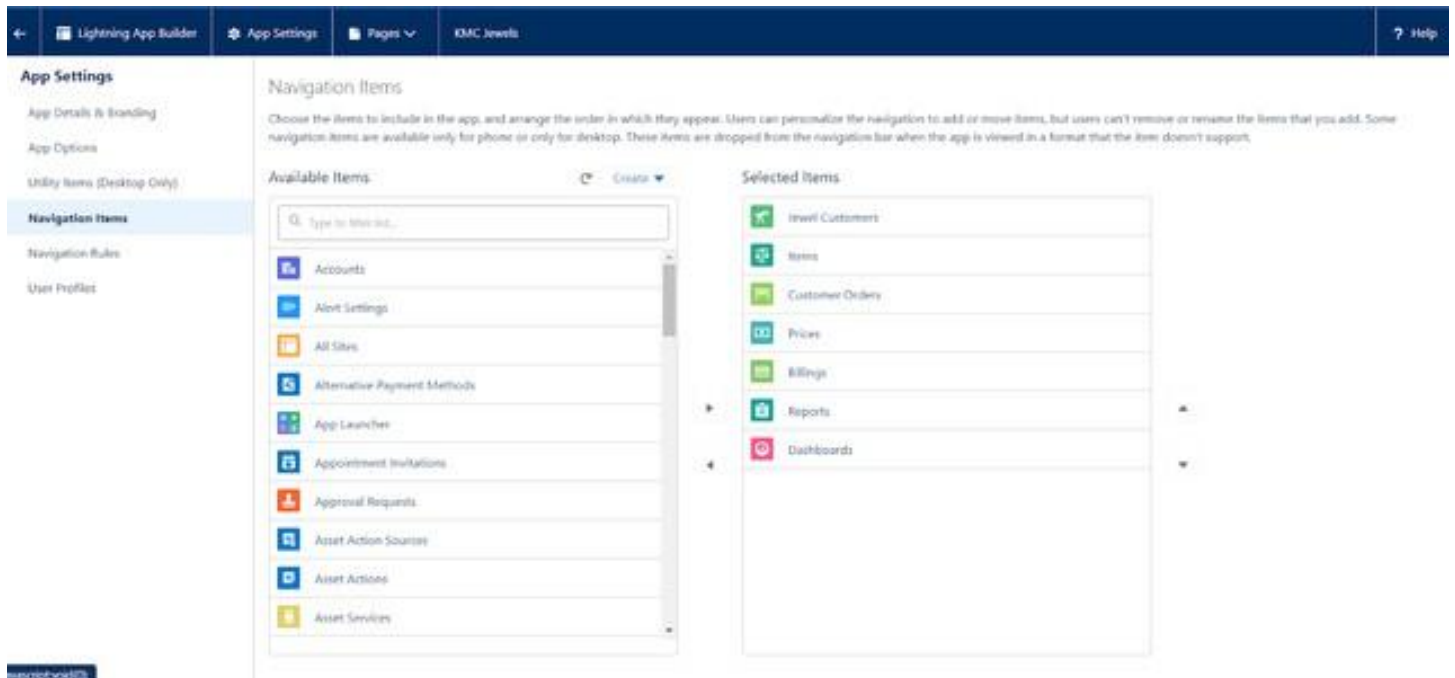


1. Then click Next >> (App option page) Set Navigation Style as Console Navigation >> Next.

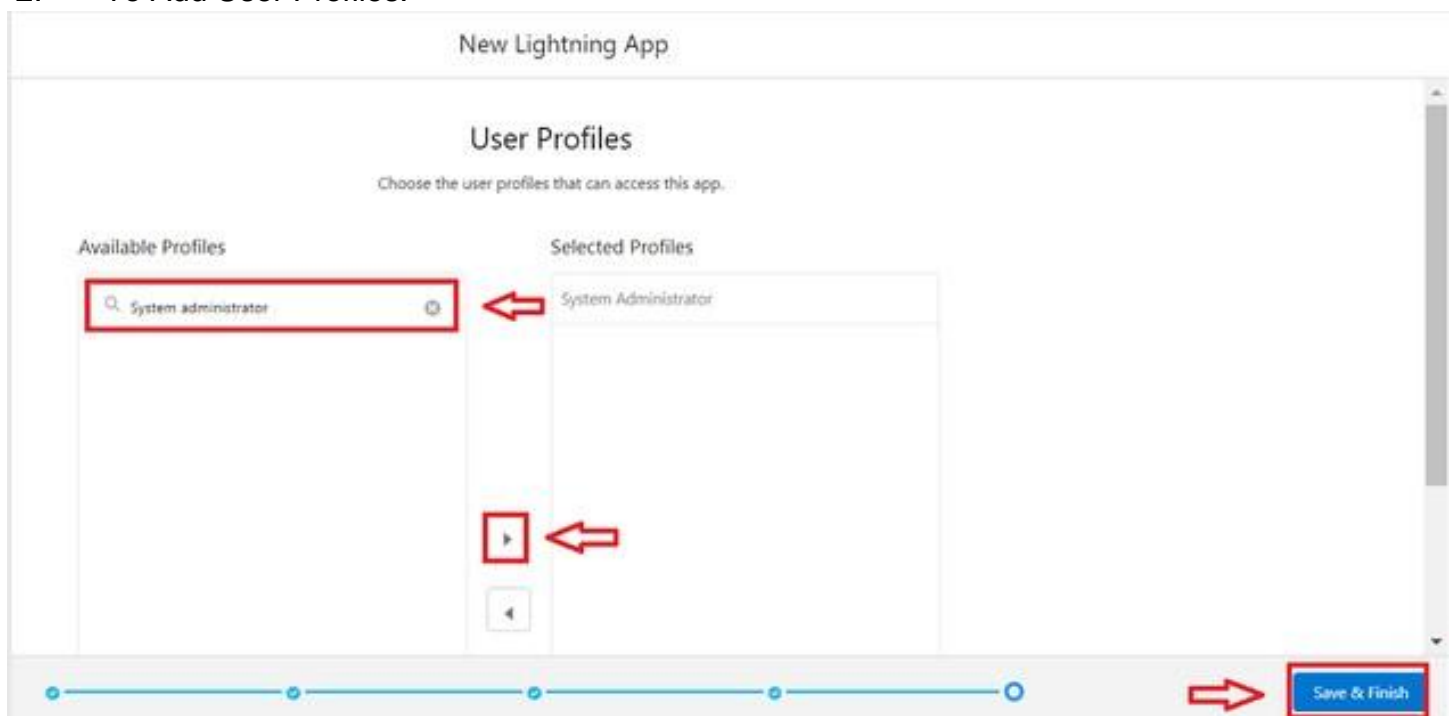


1. (Utility Items) keep it as default >> Next.

2. To Add Navigation Items:



1. 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.
2. To Add User Profiles:



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

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

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

>> Created By

>> Owner

>> Last Modified

>> Field Made During object Creation

Custom Fields:

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

Use Case:

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

Creating Lookup Relationship

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

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

1. Go to the setup page >> click on object manager >> type object name(Customer Order) in the quick find bar >> click on the object.
2. Click on fields & 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.

Creating a Master-Detail Relationship

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

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

To Create a Master-Detail relationship :

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

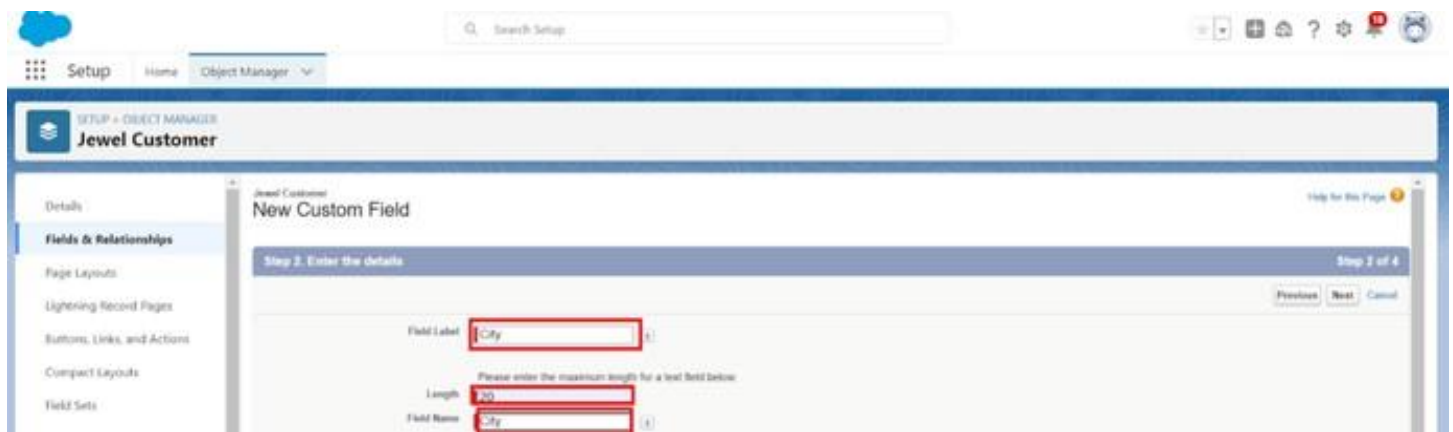
Creating Text Field in Jewel Customer Object

To create fields in an object:

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



1. Now click on “Fields & Relationships” >> New
2. Select Data type as “Text”. 3. Click on Next



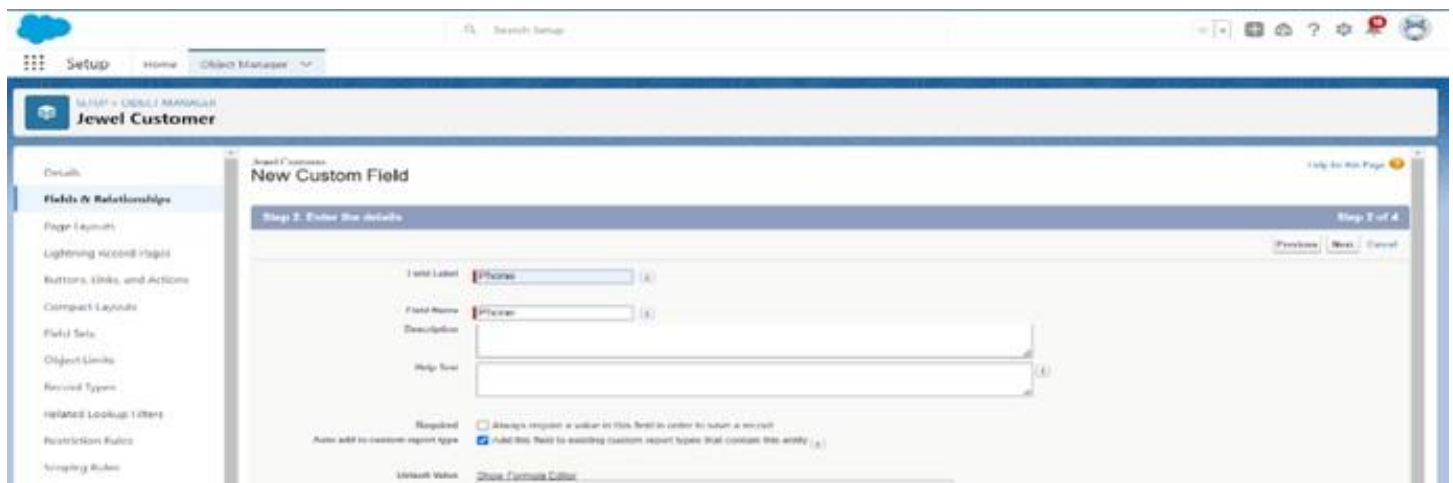
1. Fill the above as following:

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

Creating the Phone field in object Jewel Customer

To create fields in an object:

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



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

Creating the Email field in object Jewel Customer

To create fields in an object:

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.

Creating the number field in Item object

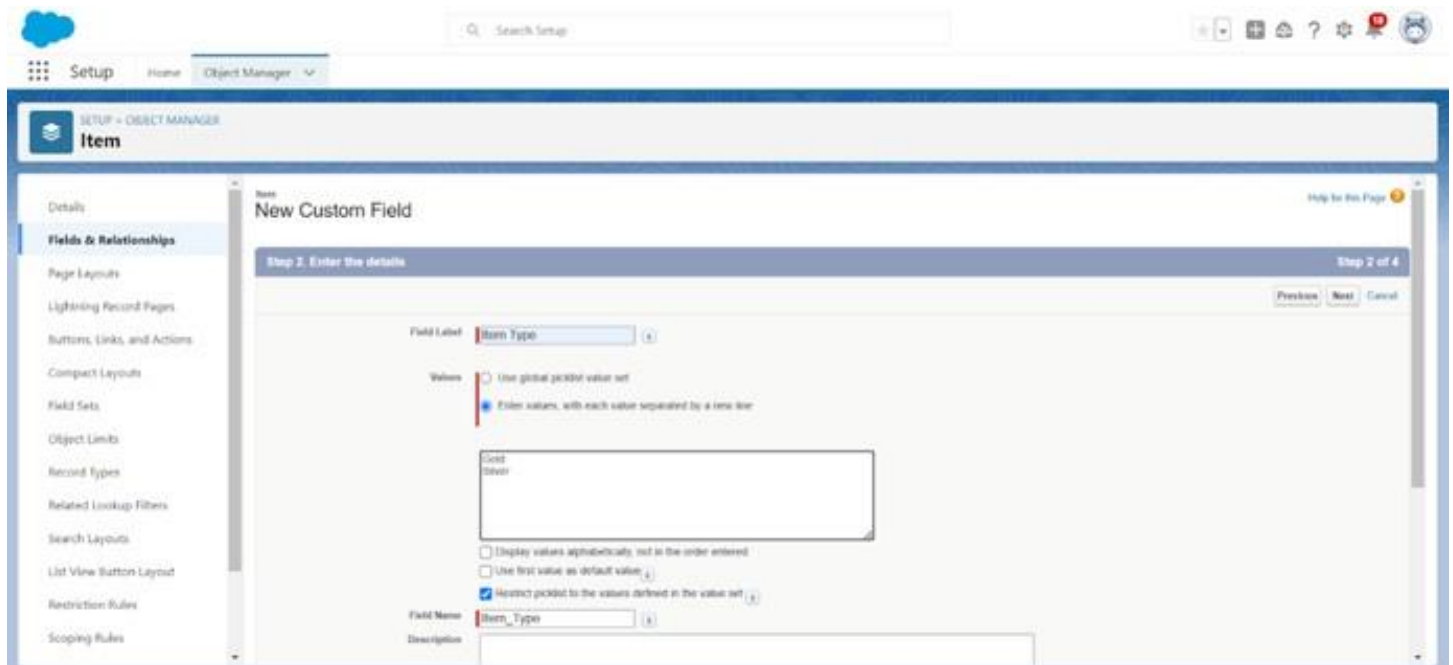
To create fields in an object:

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 ”.

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

Creating Picklist Field in Item 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.

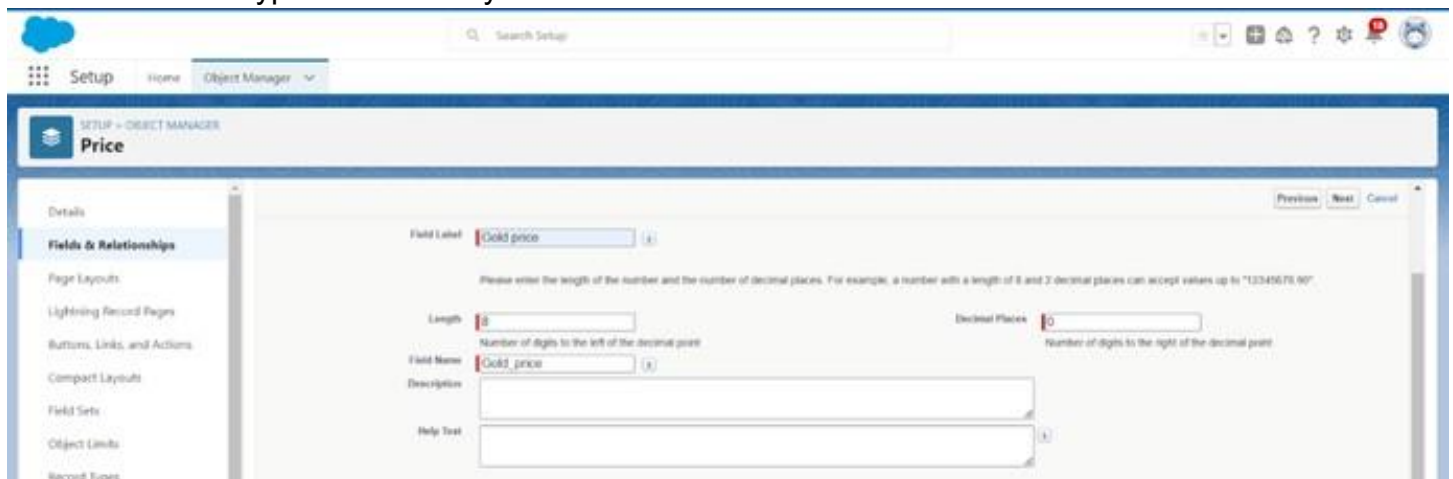


1. Click Next? Next ?Next ?Save .

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.



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

Creating Formula Field(Cross Object) in Item Object

To create fields in an object:

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

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

Setup - Object Manager - Item

New Custom Field

Step 2: Choose output type

Field Label: Gold price

Field Name: Gold_price

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

Formula Return Type

None Selected

Select one of the data types below:

- ☐ Boolean: Calculate a Boolean value. Example: `{!TODAYS} <= CloseDate`
- ☐ Currency: Calculate a dollar or other currency amount and automatically format the field as a currency amount. Example: `{!Gross Margin} * Amount * Cost__c`
- ☐ Date: Calculate a date, for example, by adding or subtracting days to other dates. Example: `{!CloseDate} + CloseDate - 7`
- ☐ Date/Time: Calculate a datetime, for example, by adding a number of hours or days to another datetime. Example: `{!Next} + NOW() + 1`
- ☐ Number: Calculate a numeric value. Example: `{!Revenue} * 1.9 * Cost__c + 12`

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

Setup - Object Manager - Item

New Custom Field

Step 3: Enter formula

Single Formula | Advanced Formula

Gold price (Currency) = Prices__r.Gold_price__c / 10

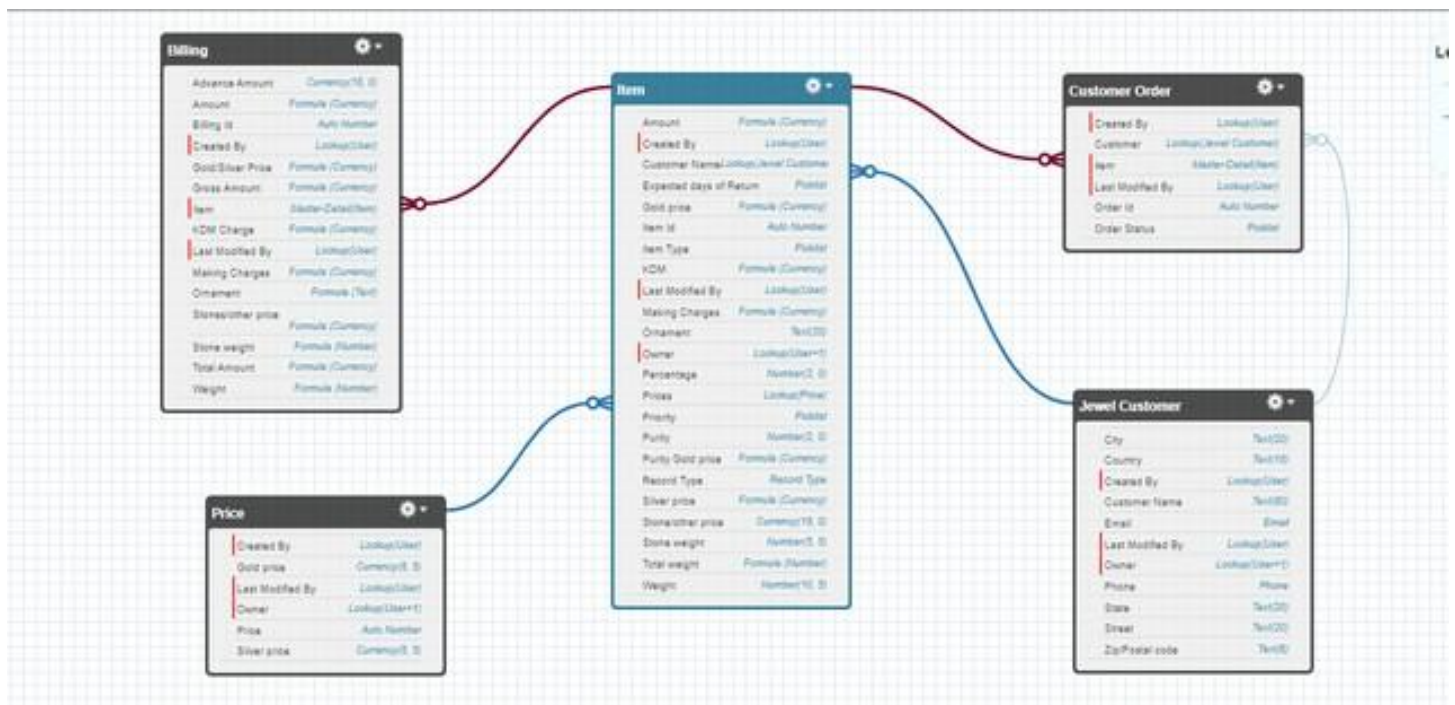
Functions

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

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

Creating Remaining Fields in Objects

Now create the remaining fields using the data types mentioned.

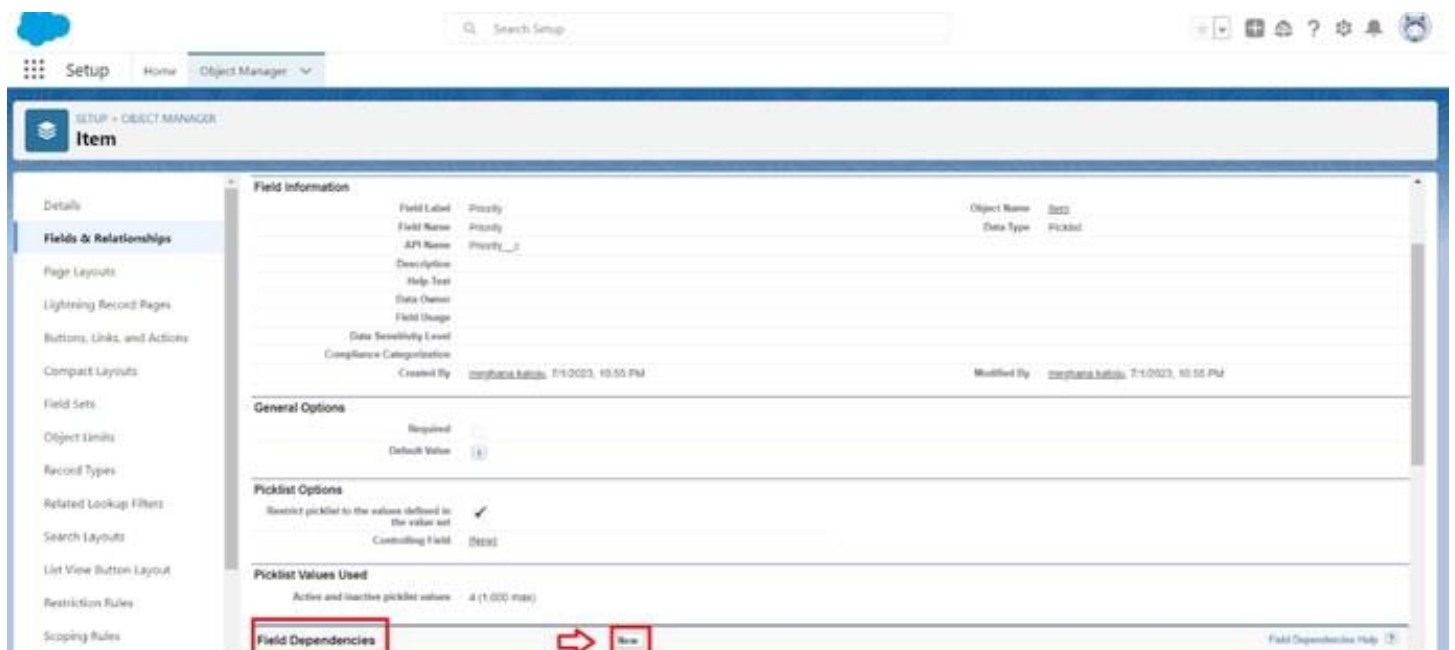


Creating the Field Dependencies

Use case:

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

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



Select Controlling Field as "Priority" and Depending field as "Expected Days of Return" >> Continue.

New Field Dependency

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

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

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

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

Continue Cancel

Controlling Field: --None--

Dependent Field: --None--

Continue Cancel

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

Setup Home 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

Restriction Rules

Scoping Rules

Save Cancel Preview

Controlling Field: Priority
Dependent Field: Expected days of Return

Instructions

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Click button to include or exclude selected values from the dependent picklist

Include Values Exclude Values

Priority:	Low	Medium	High	Critical
Expected days of Return:	1-2 Days	1-2 Days	1-3 Days	1-2 Days
	4-5 Days	4-5 Days	4-5 Days	4-5 Days
	6-7 Days	6-7 Days	6-7 Days	6-7 Days
	8-10 Days	8-10 Days	8-10 Days	8-10 Days

Click button to include or exclude selected values from the dependent picklist

Include Values Exclude Values

Save Cancel Preview

Creating the validation rule

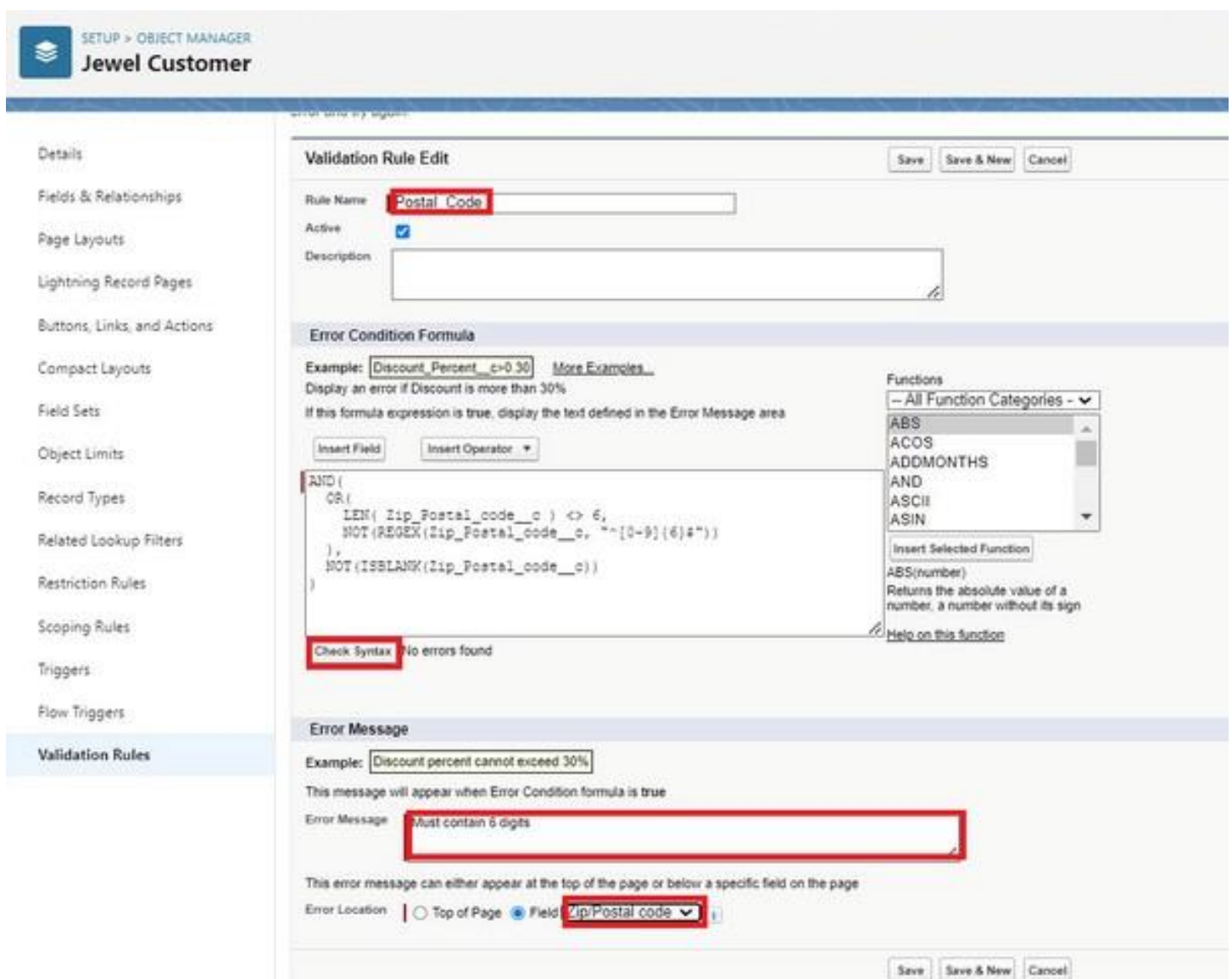
Creating the validation rule for Postal Code field in Jewel Customer object

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

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



1. Enter the Rule name as "Postal Code".
2. Insert the Error Condition Formula as : `-AND(OR(LEN(Zip_Postal_code__c) <> 6, NOT(REGEX(Zip_Postal_code__c, "[0-9]{6}$"))), NOT(ISBLANK(Zip_Postal_code__c)))`



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

NOTE:

Create One more Validation rule for Jewel Customer object.

1. Enter Rule name as “ValidationRuleForJewelCustomerObject “.
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 “ValidationRuleFor 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.

Profiles

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

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

We cannot deleted standard ones

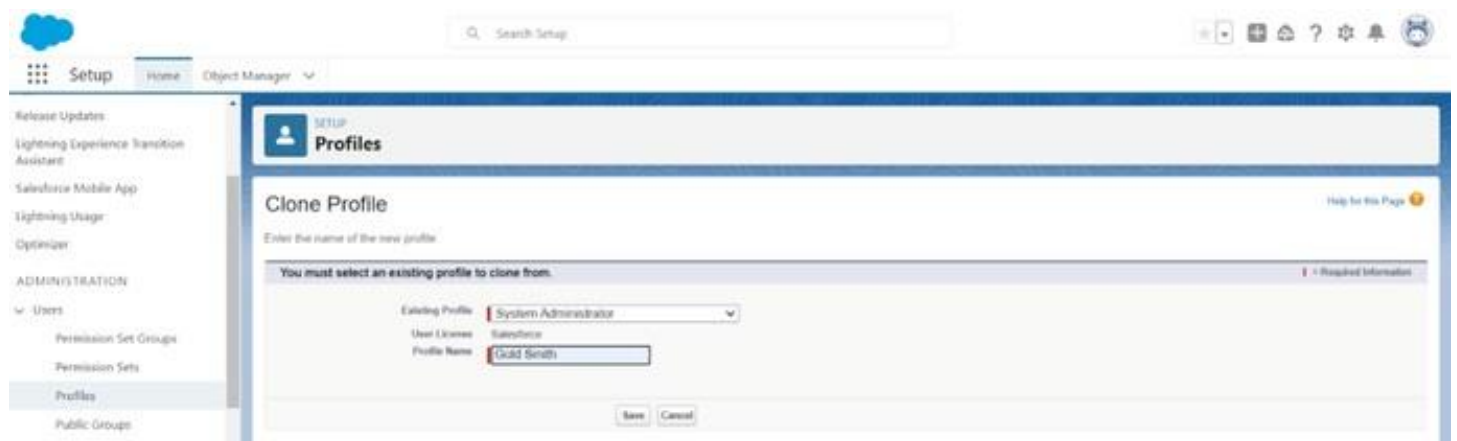
Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

Custom ones defined by us.

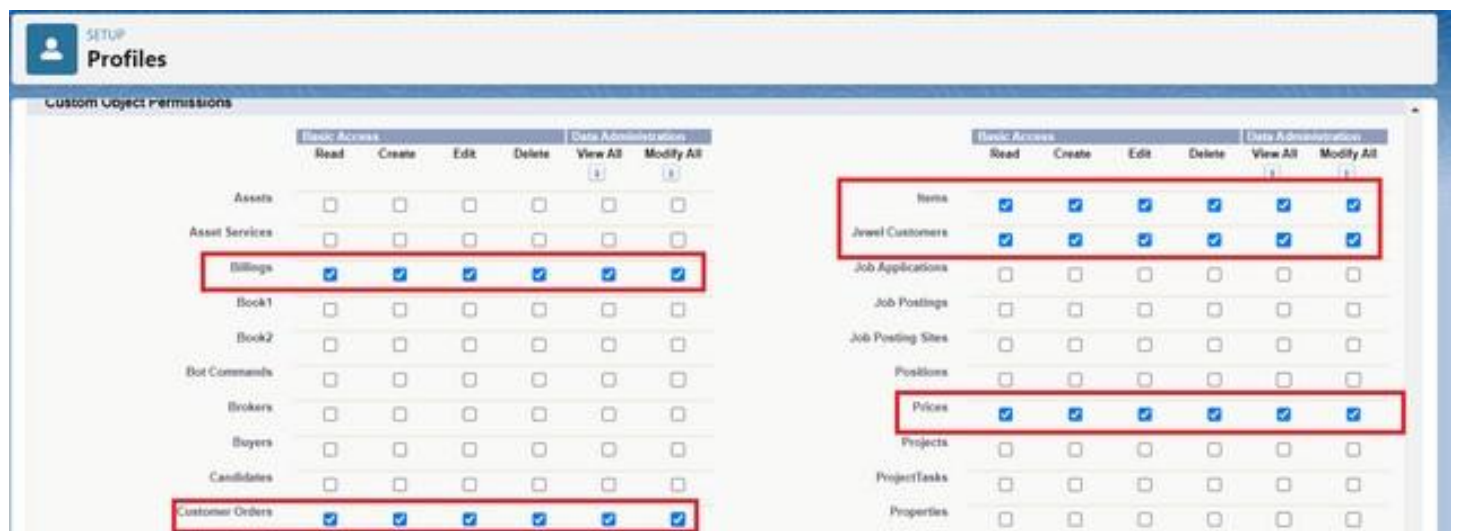
Use Case:

Gold Smith 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.



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



1. Scroll down and Click on Save.

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.

Roles

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

Use Case:

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

reating Gold Smith Role

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

The screenshot shows the Salesforce Setup interface for Roles. The left sidebar has a search bar with 'Roles' entered and the 'Roles' link highlighted. The main content area is titled 'Understanding Roles' and includes a 'Sample Role Hierarchy' section. The hierarchy is a tree diagram for 'Territory-based Sample' showing roles like 'Executive Staff', 'Western Sales', 'Eastern Sales', and 'International Sales' with their respective sub-roles. A 'Set Up Roles' button is located at the bottom right of the diagram.

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

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

[-] Nick Enterprises

[-] Add Role

[-] CEO Edit | Del | Assign

[-] Add Role

[-] HR Edit | Del | Assign

[-] Add Role

[-] Manager Edit | Del | Assign

[-] Add Role

[-] On Site Emp Edit | Del | Assign

[-] Add Role

[-] Remote Emp Edit | Del | Assign

[-] Add Role

[-] SVP Customer Service & Support Edit | Del | Assign

[-] Add Role

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

Setup Roles

Role Edit Gold Smith

Role Edit

Label: Gold Smith

Role Name: Gold_Smith

This role reports to: CEO

Role Name as displayed on reports: Gold Smith

Save Save & New Cancel

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

Creating the Role Hierarchy

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

Your Organization's Role Hierarchy

Show in tree view

[Collapse All](#) [Expand All](#)

[-] Meghana

[-] Add Role

[-] CEO Edit | Del | Assign

[-] Add Role

[-] CFO Edit | Del | Assign

[-] Add Role

[-] COO Edit | Del | Assign

[-] Add Role

[-] Gold_Smith Edit | Del | Assign

[-] Add Role

[-] Worker Edit | Del | Assign

[-] Add Role

[-] HR Edit | Del | Assign

[-] Add Role

[-] Manager Edit | Del | Assign

[-] Add Role

[-] SVP Customer Service & Support Edit | Del | Assign

[-] Add Role

[-] SVP Human Resources Edit | Del | Assign

[-] Add Role

Users

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

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

Create User

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

The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar contains a navigation menu with options like 'Users', 'Permission Set Groups', 'Profiles', and 'User Management Settings'. The main content area is titled 'Users' and shows the 'New User' form for 'Niklaus Mikaelson'. The form is divided into two sections: 'General Information' and 'Required Information'. The 'General Information' section includes fields for First Name, Last Name, Email, Username, Nickname, Title, Company, Department, and Division. The 'Required Information' section includes fields for Role, User License, Profile, and Action. The 'Role' field is highlighted with a red box, showing 'Gold Smith' selected. The 'User License' field is also highlighted with a red box, showing 'Salesforce' selected. The 'Profile' field is highlighted with a red box, showing 'Gold Smith' selected. The 'Action' field is highlighted with a red box, showing 'Add' selected. The 'Marketing User' checkbox is checked. The 'Office User' checkbox is checked. The 'Knowledge User' checkbox is checked. The 'Flow User' checkbox is checked. The 'Service Cloud User' checkbox is checked. The 'B2B.com Contributor User' checkbox is checked. The 'B2B.com Publisher User' checkbox is checked. The 'B2C User' checkbox is checked. The 'Data.com User Type' dropdown is set to 'None'. The 'Data.com Monthly Addition Limit' is set to 'None'. The 'Accessibility While Chassis' checkbox is checked. The 'High Contrast Palette on Chassis' checkbox is checked. The 'Low Lighting Pages While Scrolling' checkbox is checked. The 'Storing Mode' checkbox is checked. The 'Send Apex Warning Emails' checkbox is checked.

Save.

Create User

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

Note:

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

Page layouts

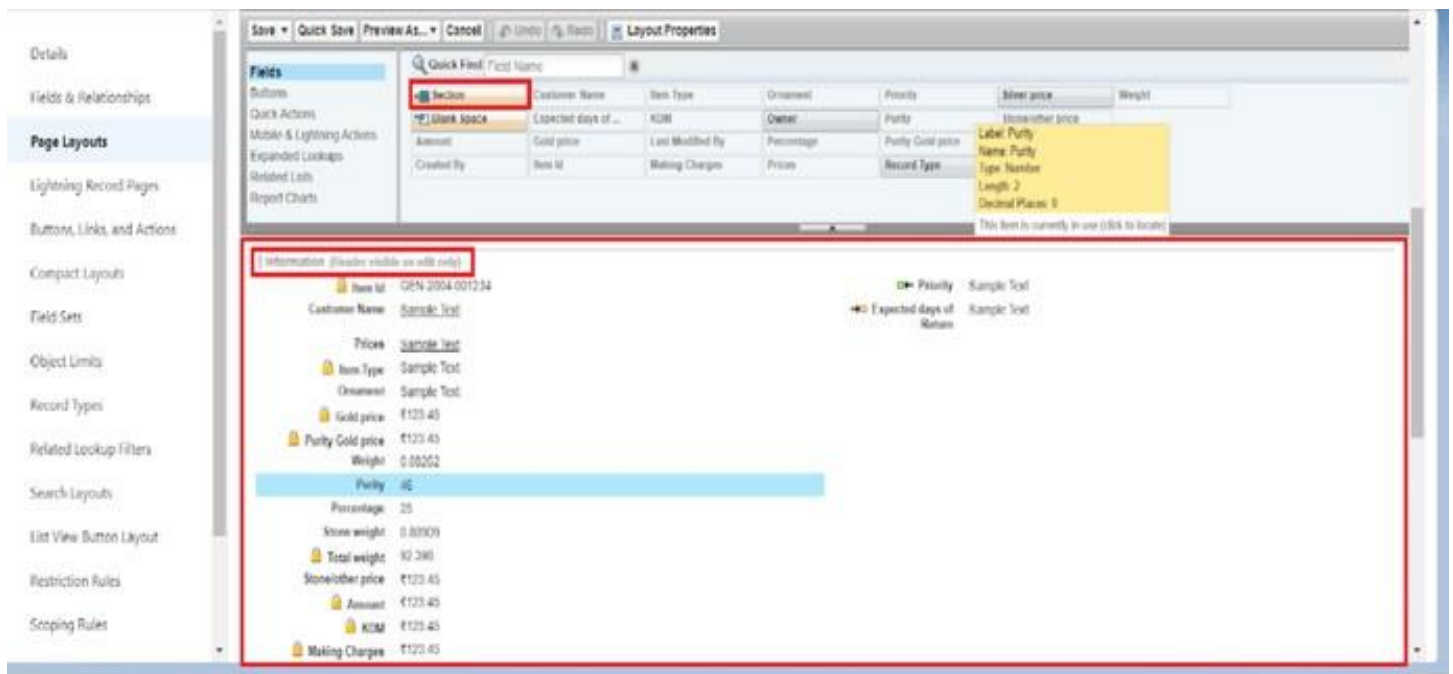
Page Layout in Salesforce allows us to customise the design and organise detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

Use Case:

Hurray!! you have completed the data model structure for your organisation but while looking at the detailed and edit pages it seems to be so clumsy, so decide to organise the page in a pleasant way for the sake of good and pleasant appearance and assemble all different kinds of information in different sections in order.

To Create a Gold Page layout

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

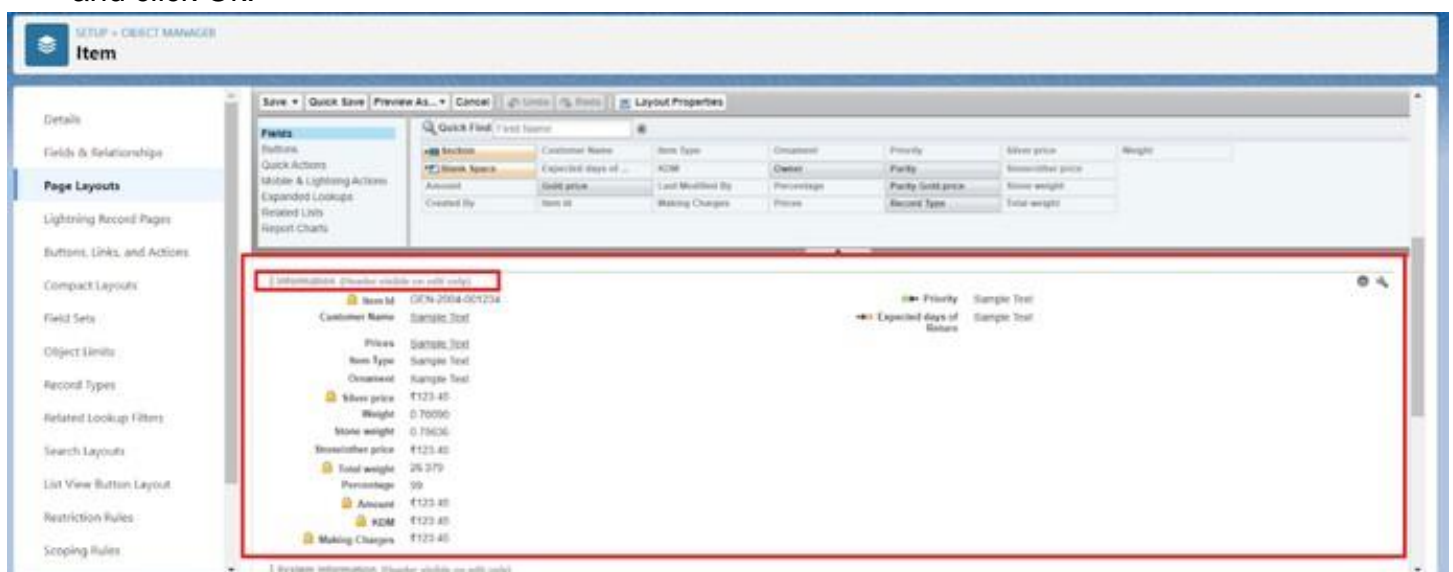


5. Click Save.

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

To Create a Silver Page layout

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



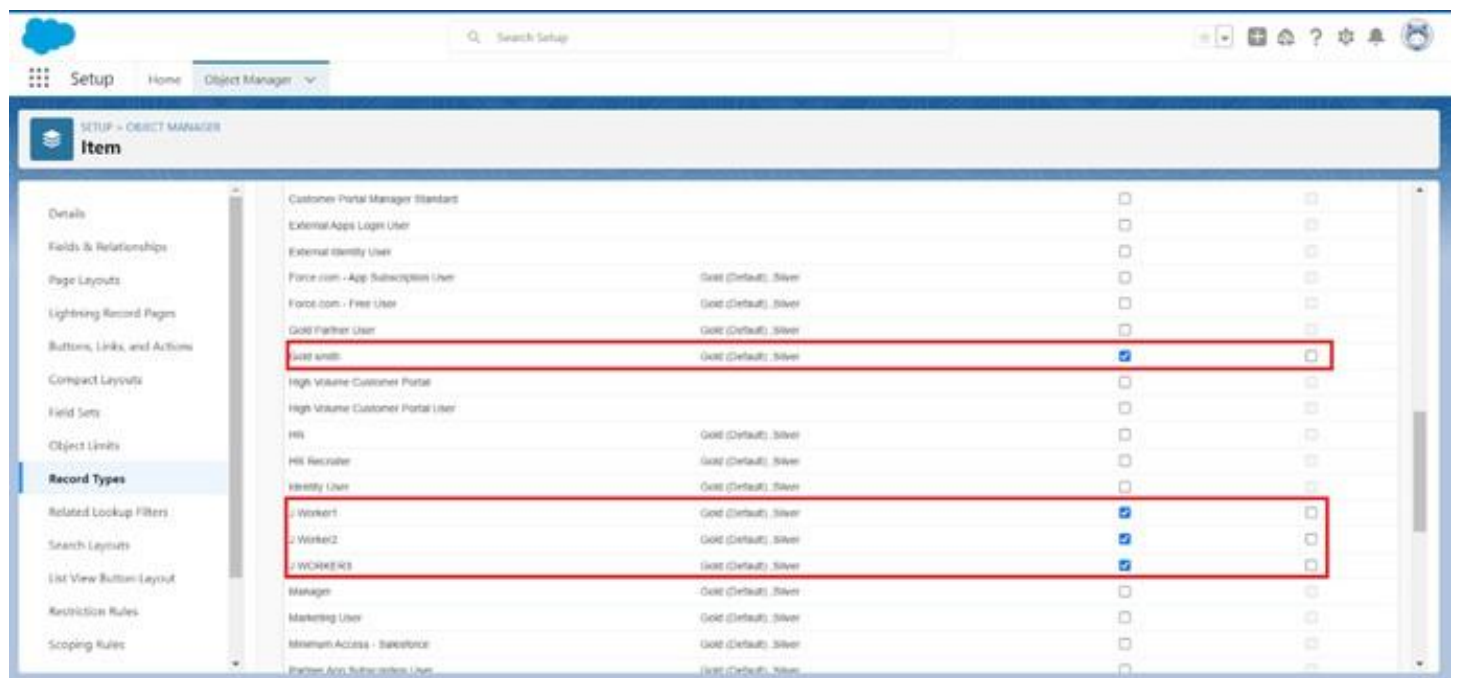
Record Types

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

Use Case:

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

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”.
4. Uncheck for “Make Available”.
5. Scroll down and check for the Gold Smith, Worker JW & System Administrator profile and click on Next.



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.

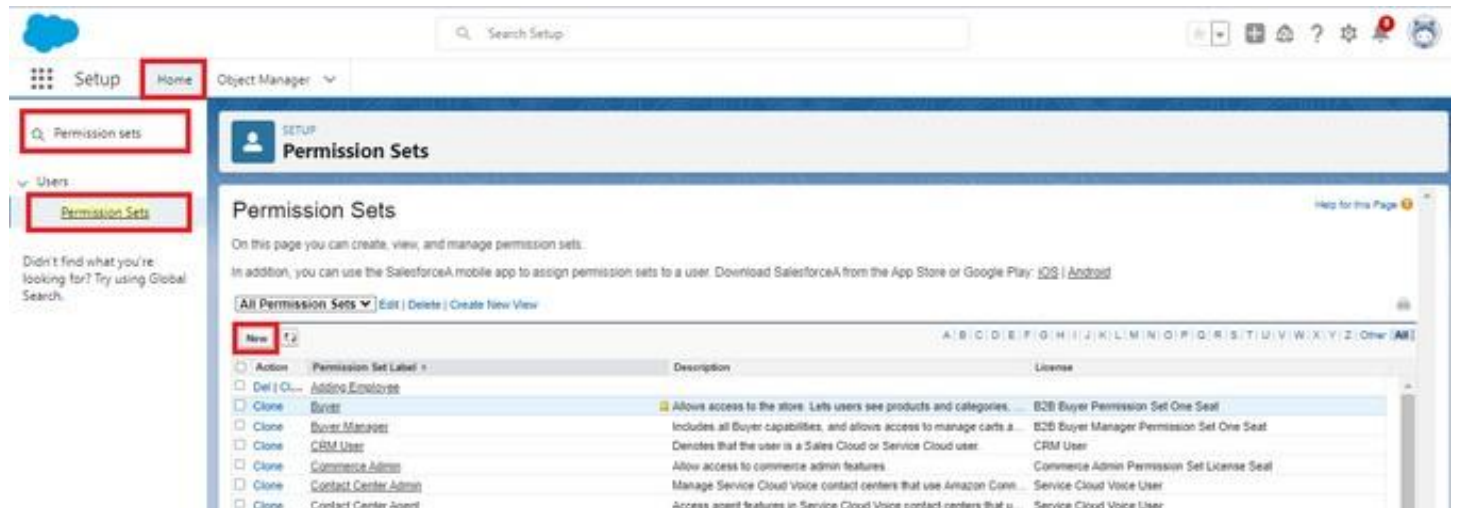
Permission sets

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

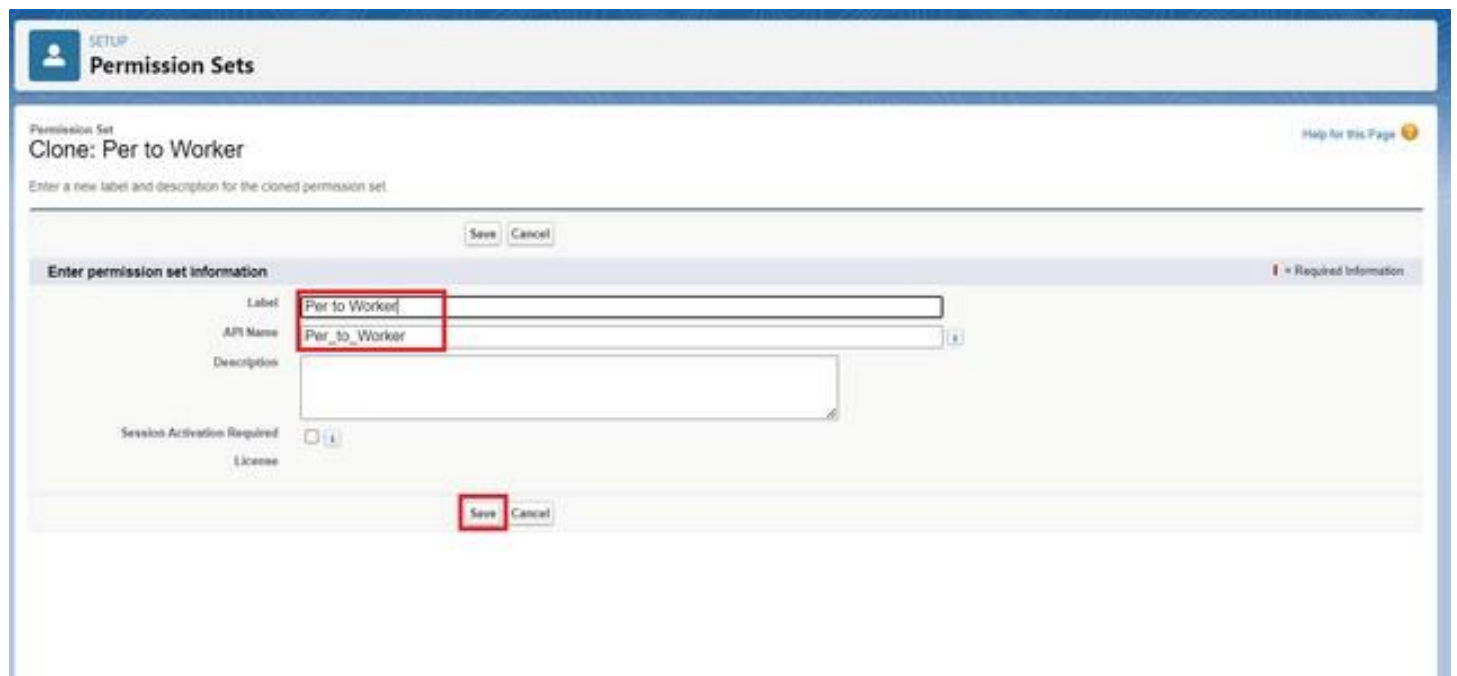
Creating permission set

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

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



2. Enter the label name as “Per to Worker”, API will be auto populated ? save.



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](#)

4. 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

1. Click on Save.
2. After saving the permission click on the Manage assignment
3. Now click on the Add Assignment.

PERMISSION SET 'PER TO WORKER' > MANAGE ASSIGNMENT EXPIRATION

Per to Worker

Select Users to Assign

All Users ▾

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

Search this list...

Full Name ↑	Alias	Username	Role	Act...	Profile
Chatter Expert	Chatter	chatty.00d5i000003kyyza4145wtjeyb44@chatter.salesforce.com		✓	Chatter Free User
Integration User	integ	integration@00d5i000003kyyza4.com		✓	Analytics Cloud Integration User
Mani deepak	mdeep	manideepak143@gmail.com	Worker	✓	Worker
Megha Katoju Site Guest User	gorist	megha_katoju@00d5i000003kyyza4.org.force.com		✓	Megha Katoju Profile
Meghana Katoj Site Guest User	guest	meghana_katoj@00d5i000003kyyza4.org.force.com		✓	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.

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	✓	Salesforce Platform	Never Expires

Cancel Back Assign

Trigger

Use Case:

Trigger and Trigger handler is designed to handle scenarios where we used to update the "Paid Amount" field on a custom object called "Billing" based on the value in a field named "Paying Amount" during both record insertion and update operations. It Calculates and updates the "Paid Amount" field based on the existing "Paid Amount" and the new "Paying Amount" during record updates. This

approach ensures that the "Paid Amount" accurately reflects the payments made by customers and provides a history of changes to the "Paid Amount" over time.

Trigger :

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

Create a Trigger Handler class

Trigger handler:

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

CODE:

```
public class UpdatePaidAmountTriggerHandler {    public static void
handleBeforeInsert(List<Billing__c>newBillings) {        for (Billing__c
billing : newBillings) {            billing.Paid_Amount__c =
billing.Paying_Amount__c;
        }
    }

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

Create the trigger

CODE:

```

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

```

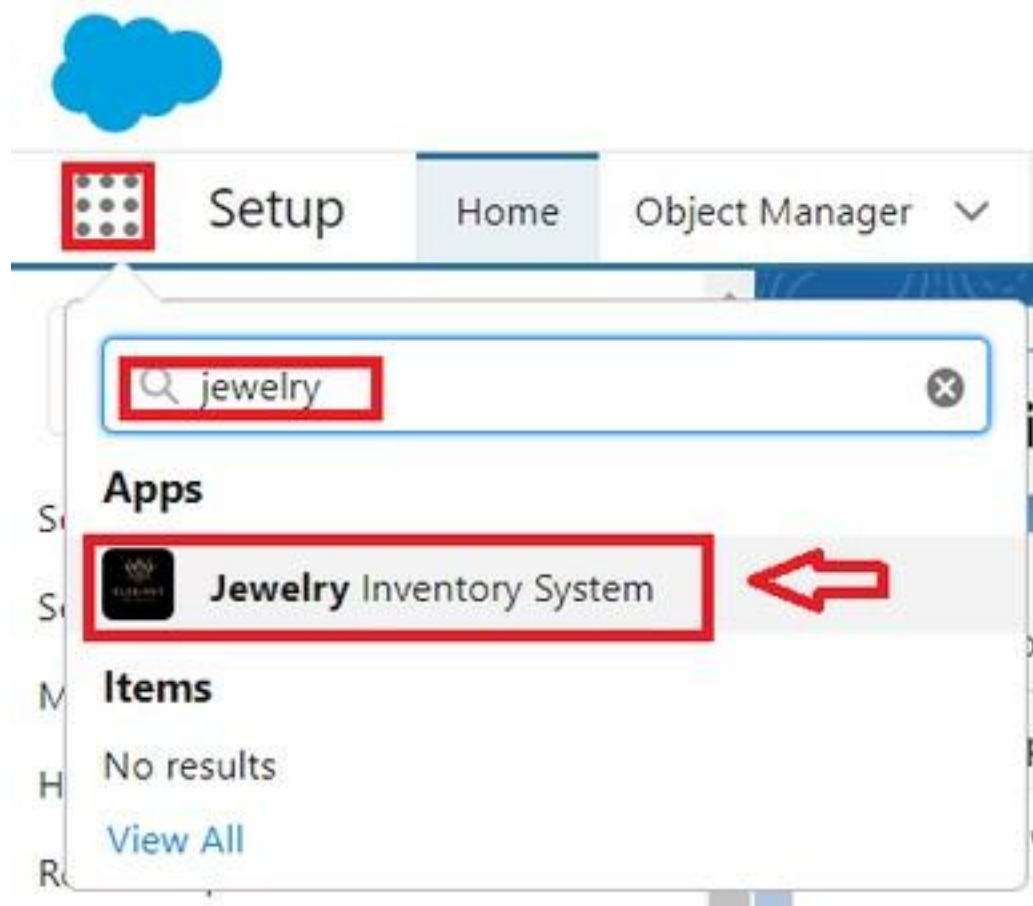
User Adoption

Use Case:

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

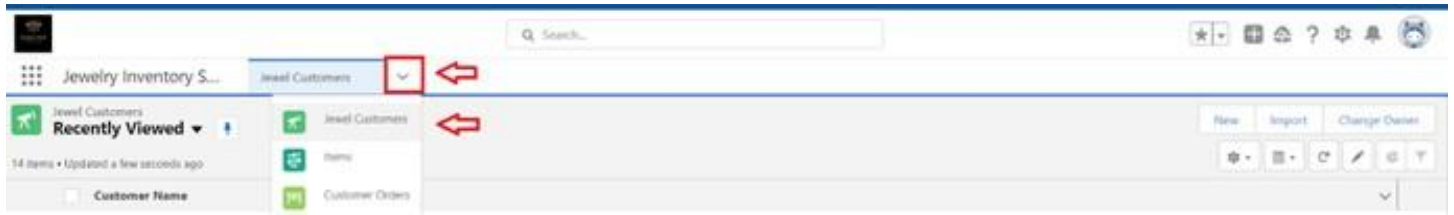
Create a Record (Jewel Customer)

1. Click on App Launcher on the left side of the screen.
2. Search Jewelry Inventory System & click on it.



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

4. Click New.



5. Fill the Details and click on Save.

View a Record(Jewel Customer)

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.

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.

Reports

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

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

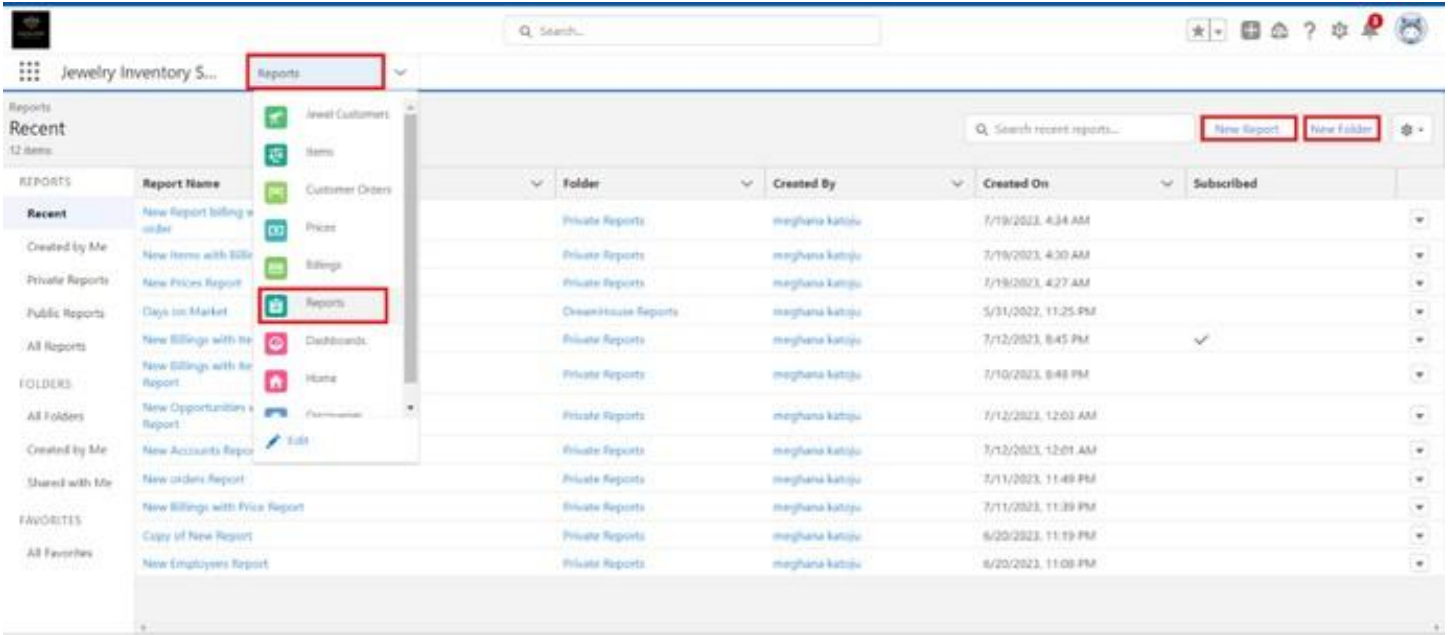
Use Case: The GoldSmith of an organisation wants to have a brief data on Gold

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

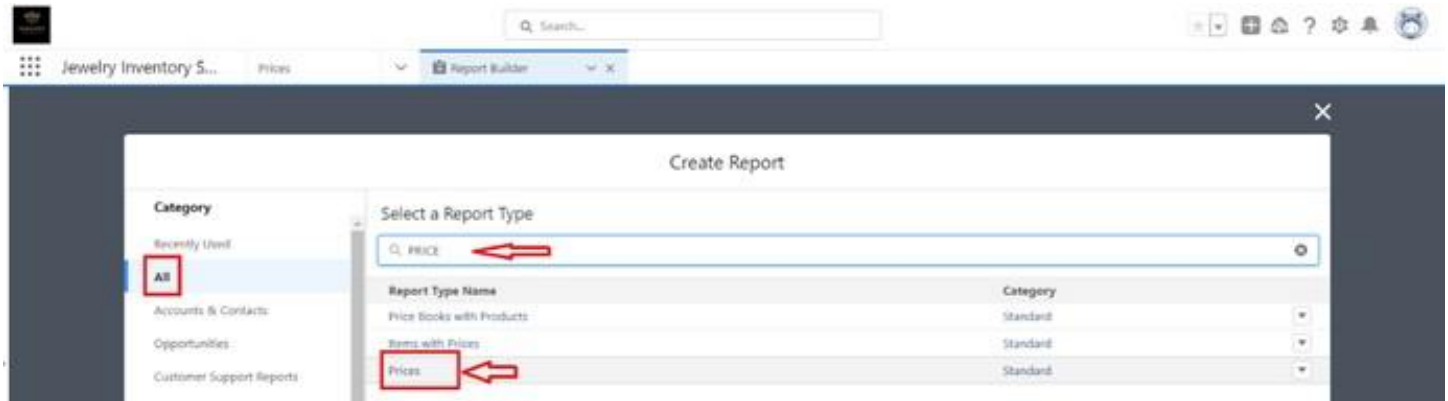
Let's create a Report.

Create Report

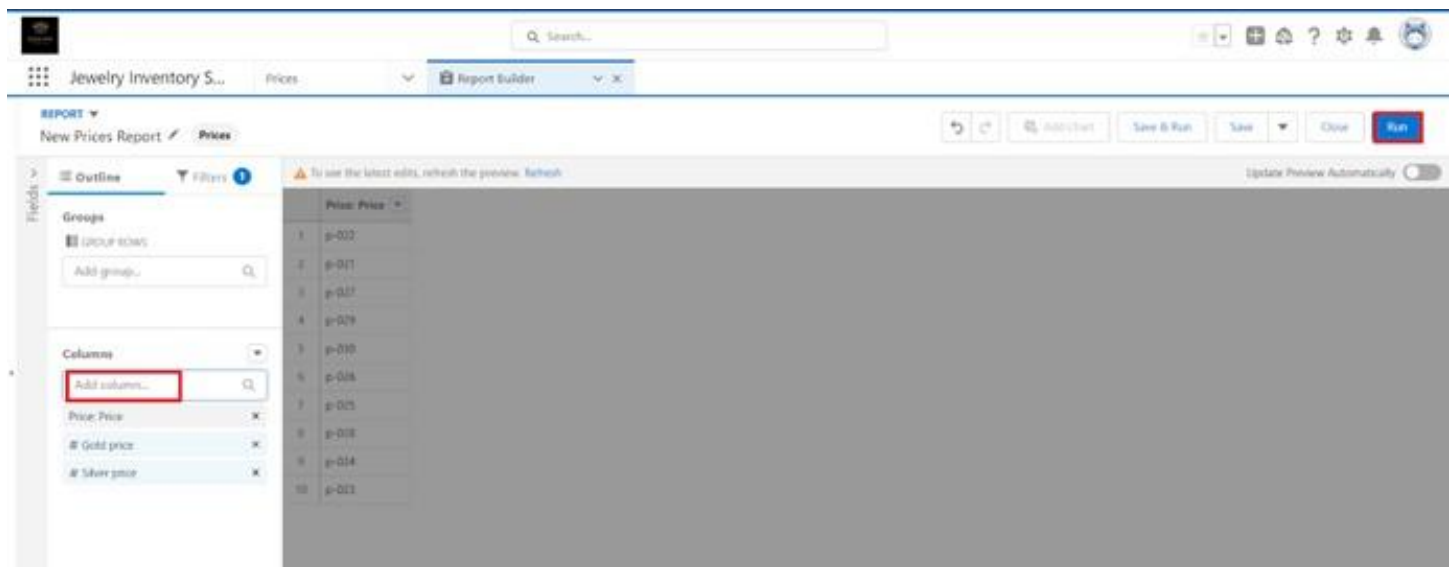
- 1.Go to the app >> click on the reports tab
- 2.Click New Report.



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

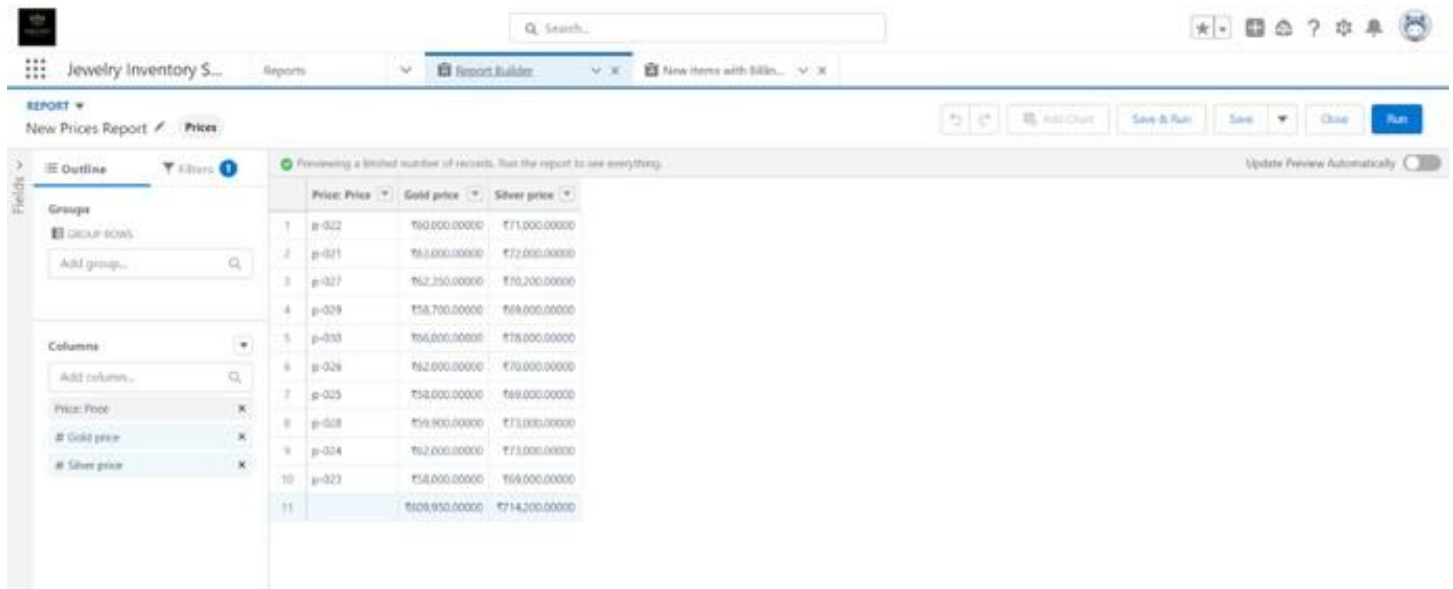


- 4.Customise your report



- Add fields from the left pane as shown below.

5. Save or run it.



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

Reports

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

Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify

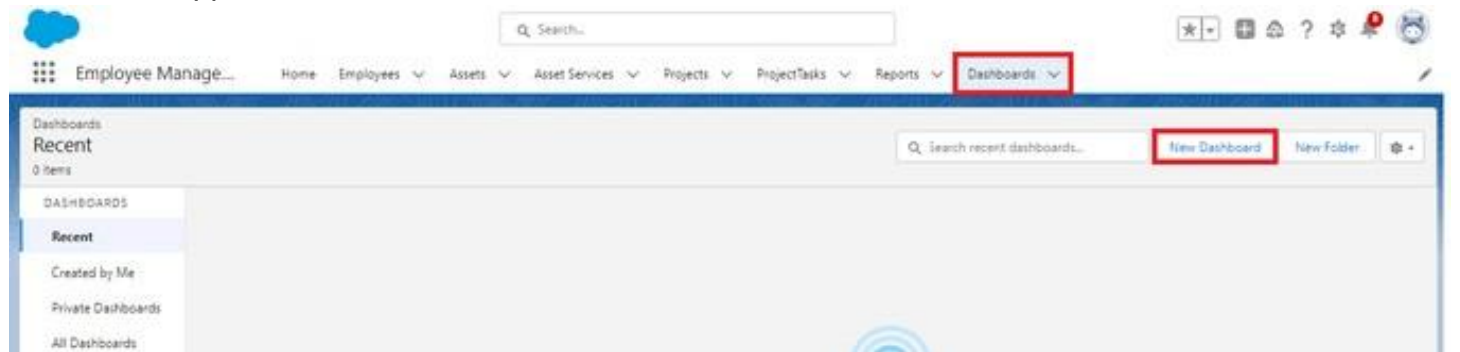
trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

Use Case:

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

Create Dashboard

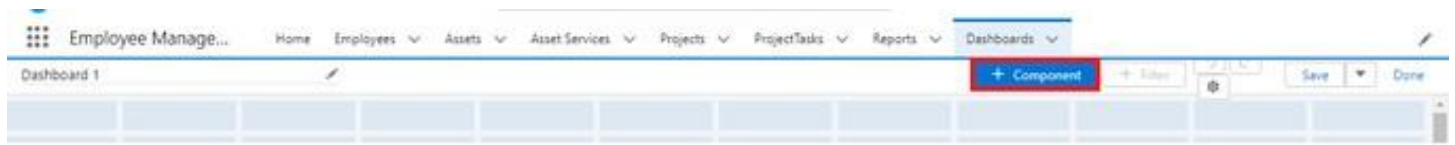
1.Go to the app >> click on the Dashboards tabs.



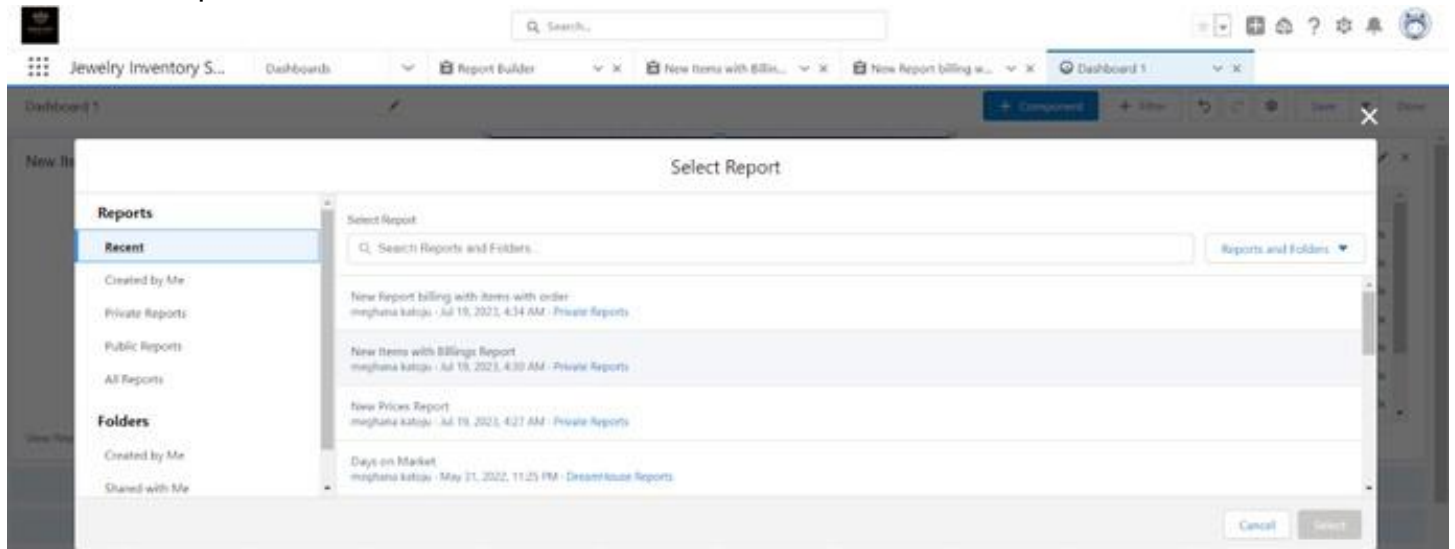
2.Give a Name and click on Create.

A screenshot of a 'New Dashboard' form. The form has a title 'New Dashboard' at the top. Below the title, there are three main sections: 'Name', 'Description', and 'Folder'. The 'Name' section has a text input field containing 'Dashboard 1'. The 'Description' section has a text input field that is empty. The 'Folder' section has a dropdown menu showing 'Private Dashboards' and a 'Select Folder' button. At the bottom right of the form, there are two buttons: 'Cancel' and 'Create'. The 'Create' button is highlighted with a red rectangular box.

3.Select add component.

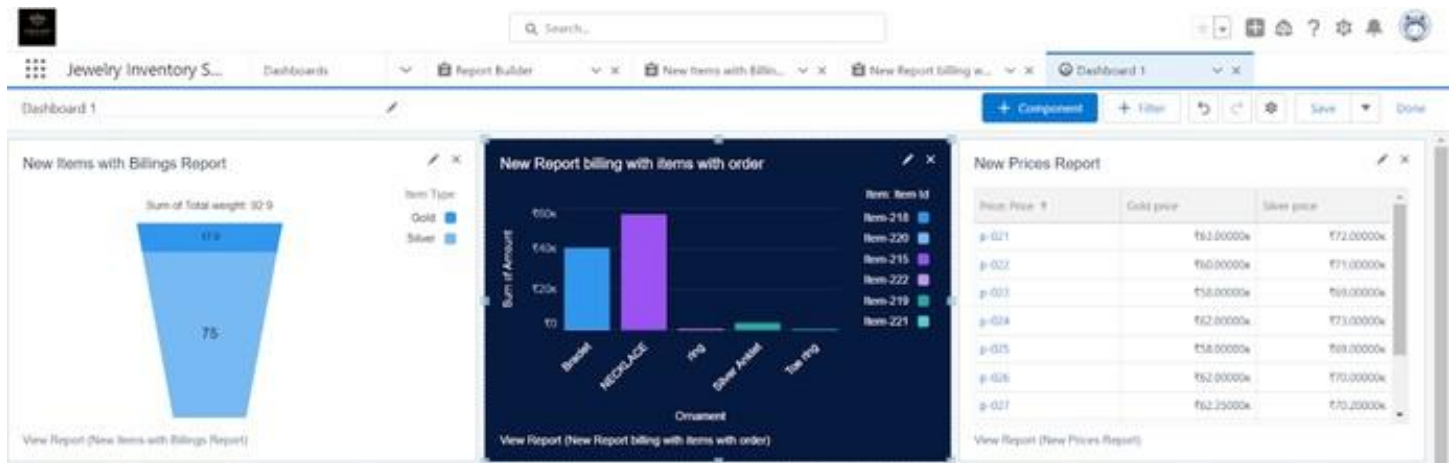


4. Select a Report and click on select.



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

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



Flows

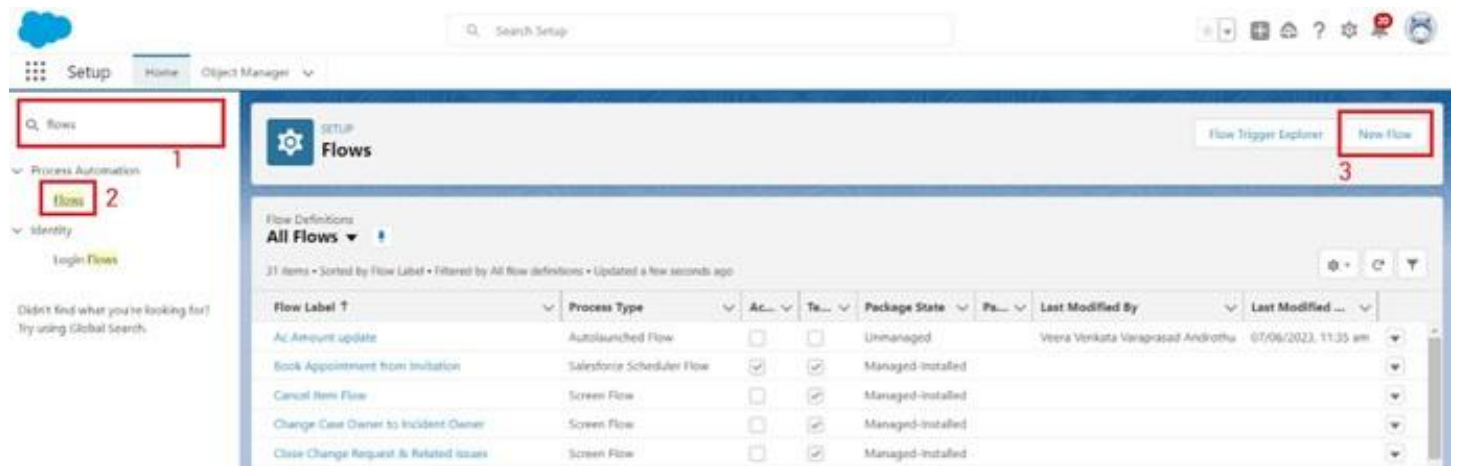
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Use Case:

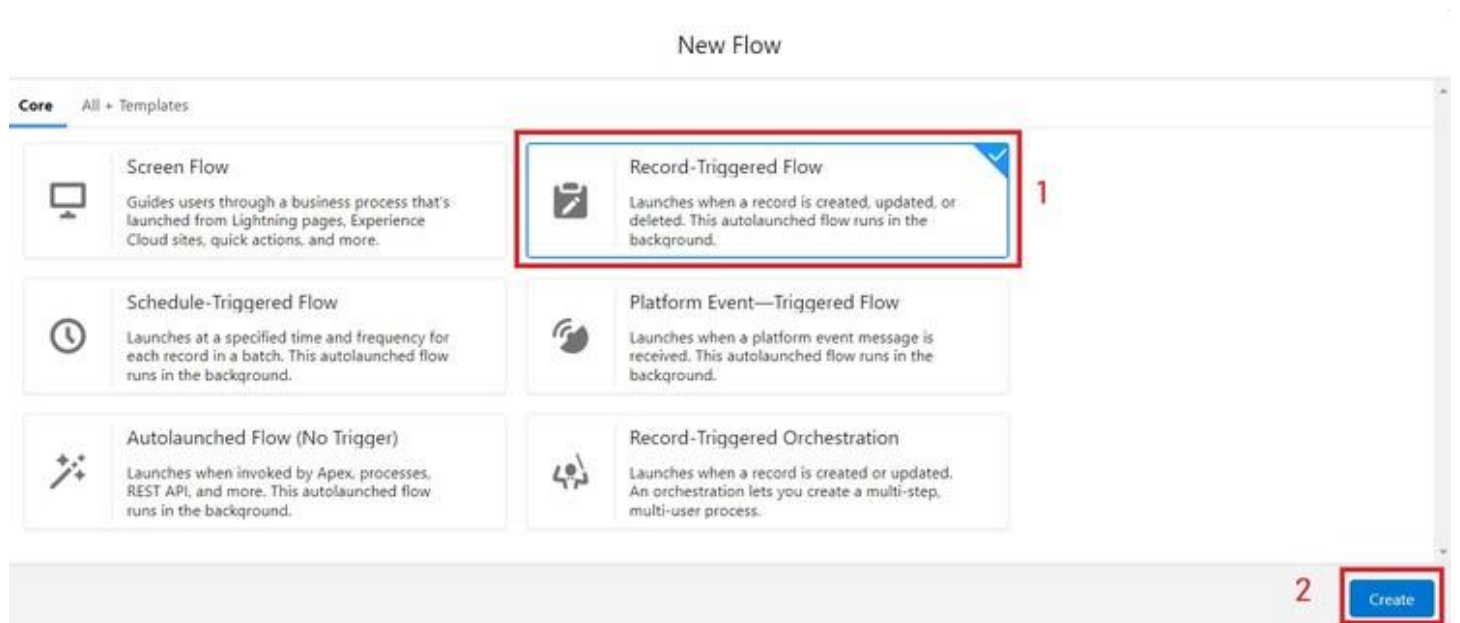
Flows, also known as Salesforce Flows or Visual Flows, are powerful declarative automation tools in Salesforce that allow users to create and manage complex business processes without the need for code. Flows are designed using a drag-and-drop interface, making them easy to use for both administrators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

Create a Flow

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



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



3.Select the Object as a “Billing” in the Drop down list.

4.Select the Trigger Flow when: “A record is Created or Updated”.

5.Select the Optimise the flow for: “Actions and Related Records” and Click on Done.

Configure Start

Select Object

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

* Object

Item

Configure Trigger

* Trigger the Flow When:

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

Set Entry Conditions

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

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

Condition Requirements

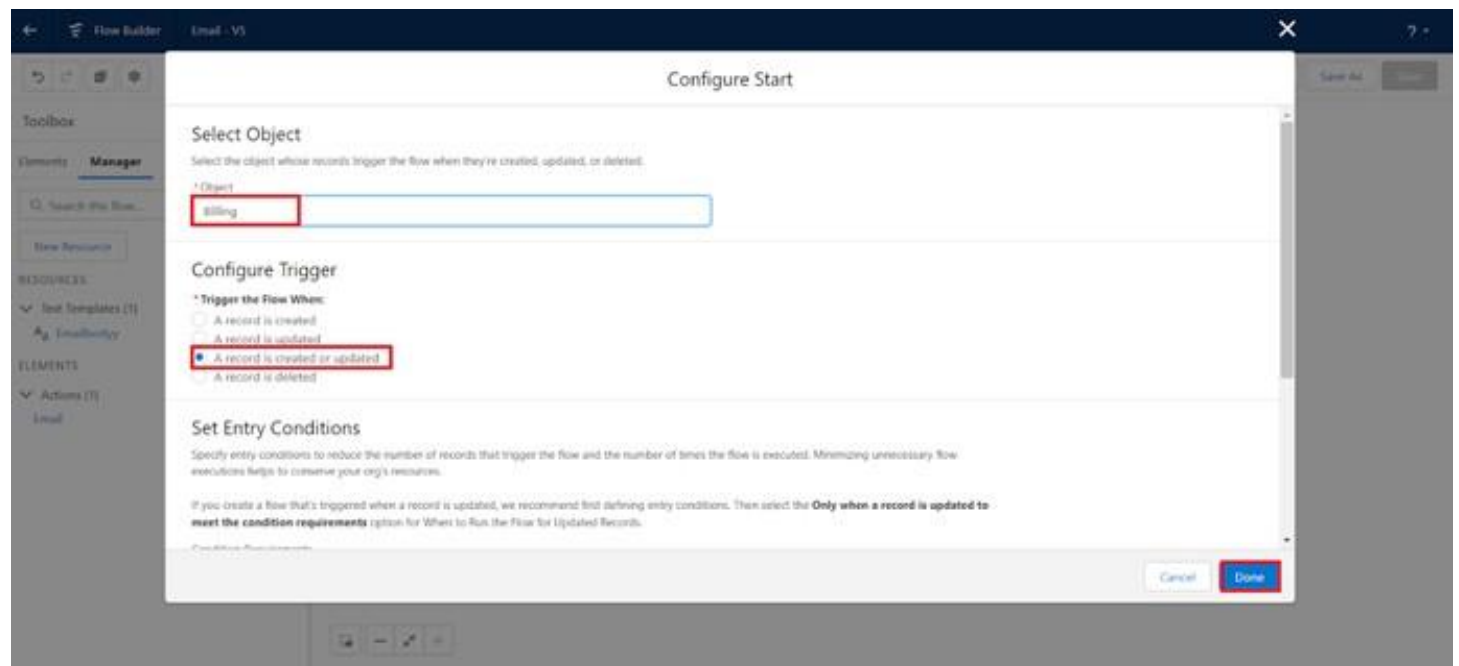
Cancel

Done

6. Now change the mode from Auto-layout to free-form.

7. Now select the manager option in the toolbox, click New resource.

8. Select the resource type as text template.



New Resource

*Resource Type

Select...

- Variable
Store a value that can be used and changed throughout the flow.
- Constant
Store a value that can be used but not changed throughout the flow.
- Formula
Calculate a value when the formula is used in the flow.
- Text Template
Store text that can be used and changed throughout the flow.
- Stage
Identify different phases in the flow to track user progress.

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

Edit Text Template

* API Name

EmailBody

Description

* Body ⓘ

Insert a resource... View as Plain Text ▼

Hello

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

Cancel Done

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.

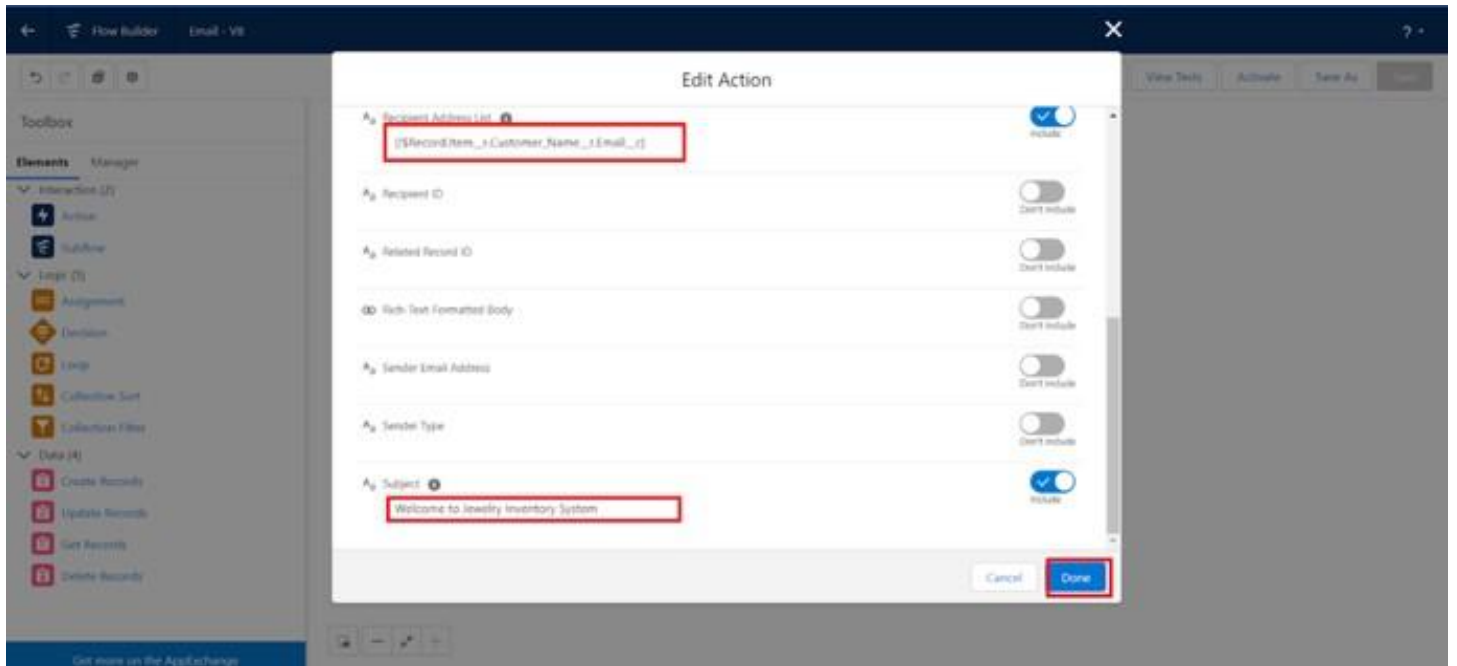
The screenshot shows the 'New Action' dialog in Salesforce. On the left, a sidebar lists categories: Order Management, Waitlists, Notifications, Email (selected), Generate Disambiguation, Feedback Log, Chatbots, Sales leads, SCV Outbound Call, Approvals, and Case. The main area is titled 'New Action' and shows the 'Send Email' action selected. Below the action name, there is a description: 'Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.' The 'Label' field is set to 'notice' and the 'API Name' field is also set to 'notice'. The 'Description' field is empty. Under the 'Set Input Values for the Selected Action' section, the 'Body' input is set to '{Email_Body}'. The 'Email Template ID' field is empty. The 'Log Email on Send' toggle is enabled. At the bottom right, there are 'Cancel' and 'Done' buttons.

19.Include Recipient Address list, select the email form the record.

{{!\$Record.Item_r.Customer_Namer.Email_c}}

20.Include the subject as “Welcome to Jewelry Inventory System ”.

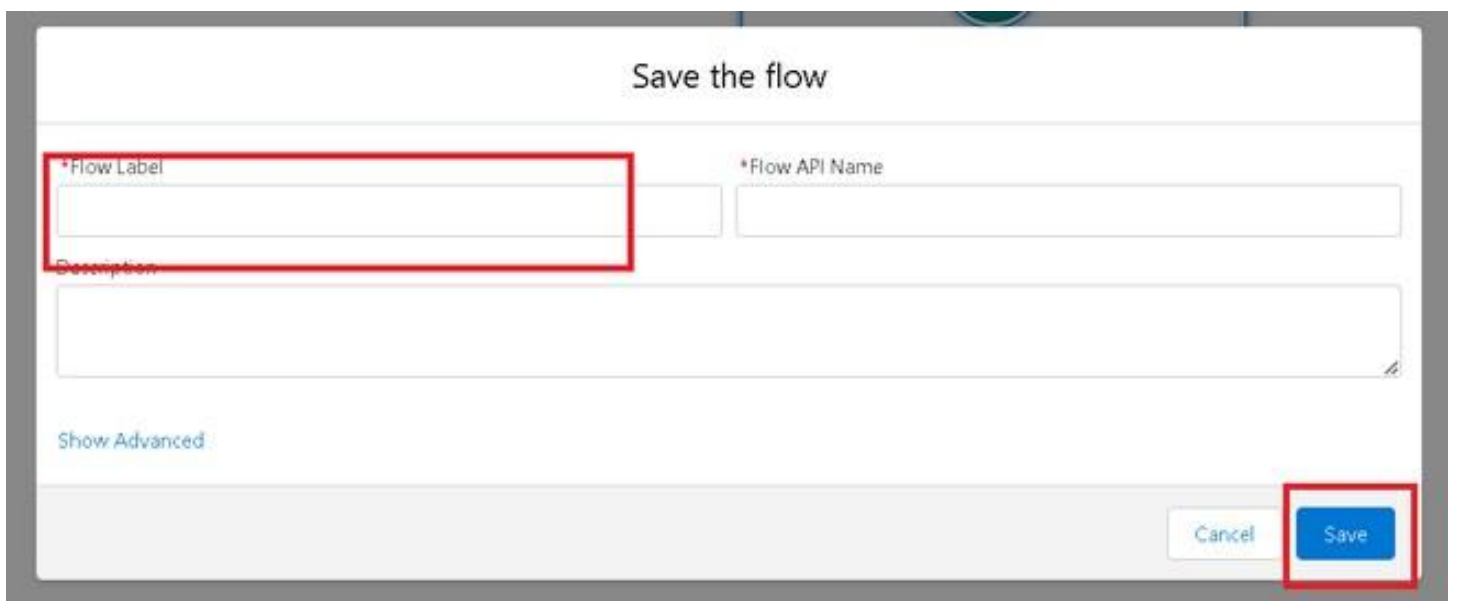
21.Click done.



22.Now drag the path from the start to the action element.

23.Click on save. Given the Flow label , Flow Api name will be auto populated.

24.And click save, and click on activate.



Flow BuilderEmail - V8

Free-FormVersion 8: Inactive—Last modified a minute agoRunDebugView TestsActivateSave AsLink

Toolbox

ElementsManager

Interaction (2)

ActionSubflow

Logic (5)

AssignmentDecisionLogicCollection SortCollection Filter

Data (4)

Create RecordsUpdate RecordsGet RecordsDelete Records

Get more on the AppExchange

Start

Record Triggered Flow

Object: BillingEdit

Trigger: A record is created or updated

Optimize for Actions and Related Records

+ Add Scheduled Paths (Optional)

Open Flow Trigger Explorer for Billing

Run immediately

Action

Email