

# **CRM APPLICATION FOR JEWEL MANAGEMENT - ADMIN**

By-

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## **Project Abstract**

The CRM Application for Jewel Management is a comprehensive Salesforce-based solution designed to streamline inventory management and sales operations for jewellery stores. The project involved the creation of a custom application that efficiently tracks and manages over 200 jewellery items across five distinct categories.

Key features include the customization of over 10 objects, 3 user roles, and 5 profiles to ensure precise data management and user access control. Additionally, the project implemented 4 automated workflows that enhance operational efficiency by reducing manual intervention in critical business processes such as order tracking, inventory updates, and sales reports.

The application also integrates dashboards and reports that provide store owners with real-time insights into their inventory and sales performance. By leveraging Salesforce's robust customization and automation capabilities, this project offers a scalable, user-friendly solution tailored to the needs of jewellery businesses.

# Task 1. Salesforce

## ● Creating Developer Account

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First Name\*      Last Name\*  
Shruti      Choudhary

Email\*  
shrutichoudhary576@gmail.com

Role\*  
Developer

Company\*  
KIET Group of Institutions

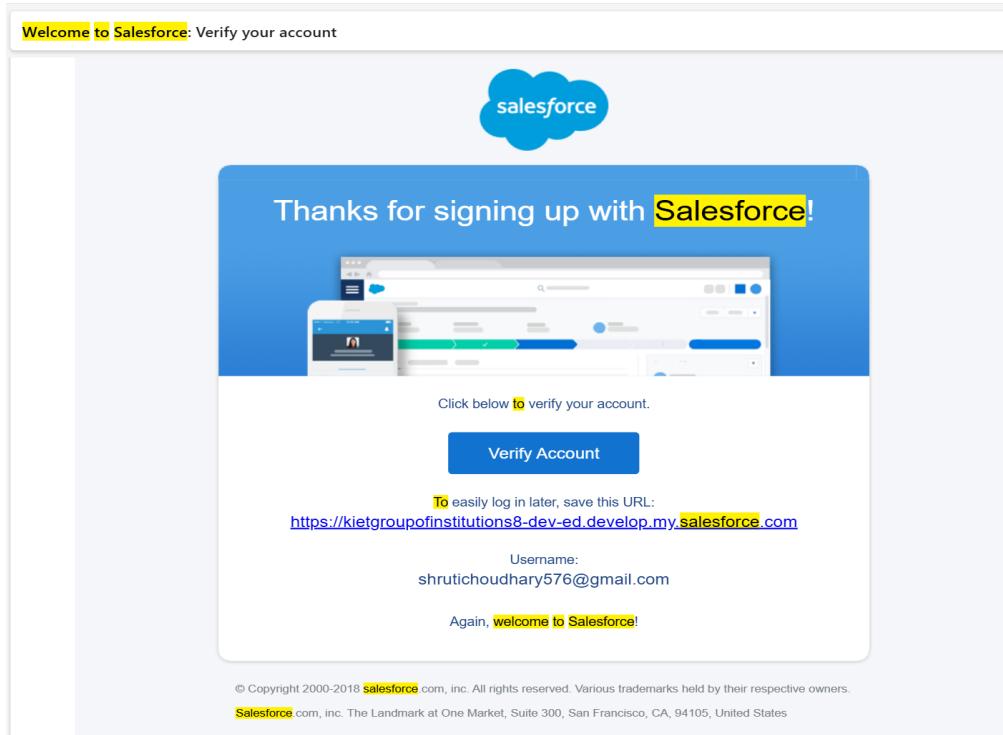
Country/Region\*  
India

State/Province\*  
Uttar Pradesh

Postal Code\*  
201206

Username\*

## ● Account Activation



# Task 2. Object

- Create Jewel Customer Object

The screenshot shows the 'Object Manager' section of the Salesforce setup. A new object is being created with the following details:

- Name:** Jewel Customer
- Label:** Jewel Customer
- Plural Label:** Jewel Customers
- Description:** (Empty)
- Record Name:** Jewel\_Customer
- Content Name:** None

- Create Item Object

The screenshot shows the 'Object Manager' section of the Salesforce setup. A new object is being created with the following details:

- Name:** Item
- Label:** Item
- Plural Label:** Items
- Description:** (Empty)
- Record Name:** Item
- Content Name:** None

|                |                  |               |            |   |
|----------------|------------------|---------------|------------|---|
| Customer Order | Customer_Order_c | Custom Object | 28/07/2024 | ▼ |
| Billing        | Billing_c        | Custom Object | 28/07/2024 | ▼ |
| Price          | Price_c          | Custom Object | 29/07/2024 | ▼ |

## Task 3. Tabs

- Creating a Custom 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 web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

| Action     | Label           | Tab Style   | Description |
|------------|-----------------|-------------|-------------|
| Edit   Del | Billings        | Camera      |             |
| Edit   Del | Customer Orders | Chess piece |             |
| Edit   Del | Items           | Bell        |             |
| Edit   Del | Jewel Customers | Fan         |             |
| Edit   Del | Prices          | Chip        |             |

## Task 4. The Lightning App

- Creating a Lightning App

Setup Home Object Manager ▾

Q app

Salesforce Mobile App

▽ Data

Mass Transfer Approval Requests

▽ Apps

App Manager

AppExchange Marketplace

▽ Connected Apps

Connected Apps OAuth Usage

SETUP Lightning Experience App Manager

New Lightning App New Connected App

24 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

| App Name ↑                      | Developer Name               | Description  | Last Modified ...    | App Type  | Vi... |
|---------------------------------|------------------------------|--|----------------------|-----------|-------|
| 7 Content                       | Content                      | Salesforce CRM Content                                       | 29/05/2024, 11:11 pm | Classic   | ▼     |
| 8 Data Manager                  | DataManager                  | Use Data Manager to view limits, monitor usage, and manag... | 29/05/2024, 11:11 pm | Lightning | ▼     |
| 9 Digital Experiences           | SalesforceCMS                | Manage content and media for all of your sites.              | 29/05/2024, 11:11 pm | Lightning | ▼     |
| 10 Jewellery Inventory Syste... | Jewellery_Inventory_Syste... | Elevate your look with elegance                              | 27/07/2024, 10:13 pm | Lightning | ▼     |
| 11 Lightning Usage App          | LightningInstrumentation     | View Adoption and Usage Metrics for Lightning Experience     | 29/05/2024, 11:11 pm | Lightning | ▼     |

## Task 5. Fields

### • Creating a Lookup relationship

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

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

| Fields & Relationships         |              |                        |                   |         |
|--------------------------------|--------------|------------------------|-------------------|---------|
| 6 Items, Sorted by Field Label |              |                        |                   |         |
| FIELD LABEL                    | ▲ FIELD NAME | DATA TYPE              | CONTROLLING FIELD | INDEXED |
| Created By                     | CreatedById  | Lookup(User)           |                   |         |
| Customer                       | Customer__c  | Lookup(Jewel Customer) |                   | ✓       |

### • Creating a Master Detail Relationship

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.

|                  |                  |                     |   |
|------------------|------------------|---------------------|---|
| Item             | Item__c          | Master-Detail(Item) | ✓ |
| Last Modified By | LastModifiedById | Lookup(User)        |   |
| Order Status     | Order_Status__c  | Picklist            | ▼ |

## • Creating Fields in Jewel Customer Object

### 1. City

| Fields & Relationships          |            |           |                   |         |
|---------------------------------|------------|-----------|-------------------|---------|
| 11 Items, Sorted by Field Label |            |           |                   |         |
| FIELD LABEL                     | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
| City                            | City__c    | Text(20)  |                   | ▼       |

### 2. Phone

|       |          |          |   |
|-------|----------|----------|---|
| Phone | Phone__c | Phone    | ▼ |
| State | State__c | Text(20) | ▼ |

### 3. Email

|                  |                  |              |   |
|------------------|------------------|--------------|---|
| Email            | Email__c         | Email        | ▼ |
| Last Modified By | LastModifiedById | Lookup(User) |   |

### 4. Order Status

| Customer Order              |                                |                  |                        |                   |
|-----------------------------|--------------------------------|------------------|------------------------|-------------------|
| Details                     | Fields & Relationships         |                  |                        |                   |
| Fields & Relationships      | 6 Items, Sorted by Field Label |                  |                        |                   |
| Page Layouts                | FIELD LABEL                    | FIELD NAME       | DATA TYPE              | CONTROLLING FIELD |
| Lightning Record Pages      | Created By                     | CreatedBy        | Lookup(User)           |                   |
| Buttons, Links, and Actions | Customer                       | Customer__c      | Lookup(Jewel Customer) | ✓                 |
| Compact Layouts             | Customer Order Name            | Name             | Auto Number            | ✓                 |
| Field Sets                  | Item                           | Item__c          | Master-Detail(Item)    | ✓                 |
| Object Limits               | Last Modified By               | LastModifiedById | Lookup(User)           |                   |
| Record Types                | Order Status                   | Order_Status__c  | Picklist               | ▼                 |
| Related Lookup Filters      |                                |                  |                        |                   |
| Search Layouts              |                                |                  |                        |                   |

**Picklist Options**

- Restrict picklist to the values defined in the value set
- Controlling Field: [New]

**Picklist Values Used**

Active and inactive picklist values: 5 (1,000 max)

**Field Dependencies**

No dependencies defined.

**Validation Rules**

No validation rules defined.

**Values**

| Action   | Values        | API Name      | Default                  | Chart Colors         | Modified By                            |
|--|---------------|---------------|--------------------------|----------------------|--|
| <input type="checkbox"/> Edit   Del   Deactivate | Started       | Started       | <input type="checkbox"/> | Assigned dynamically | Shruti Choudhary, 27/07/2024, 11:57 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | Not Started   | Not Started   | <input type="checkbox"/> | Assigned dynamically | Shruti Choudhary, 27/07/2024, 11:57 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | On Hold       | On Hold       | <input type="checkbox"/> | Assigned dynamically | Shruti Choudhary, 27/07/2024, 11:57 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | Completed     | Completed     | <input type="checkbox"/> | Assigned dynamically | Shruti Choudhary, 27/07/2024, 11:57 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | Not Completed | Not Completed | <input type="checkbox"/> | Assigned dynamically | Shruti Choudhary, 27/07/2024, 11:57 pm |

**Inactive Values**

## 5. More fields

Object name      Fields

Jewel Customer

Field Name      Data type

State      Text(20)

Street      Text(20)

Country      Text(18)

Zip/Postal code      Text(6)

| FIELD LABEL     | FIELD NAME        | DATA TYPE | CONTROLLING FIELD | INDEXED |
|-----------------|-------------------|-----------|-------------------|---------|
| City            | City_c            | Text(20)  |                   |         |
| Country         | Country_c         | Text(8)   |                   |         |
| State           | State_c           | Text(20)  |                   |         |
| Street          | Street_c          | Text(20)  |                   |         |
| Zip/Postal code | Zip_Postal_code_c | Text(6)   |                   |         |

# • Creating Fields in Item Object

## 1. Number Field

|                   |                      |                    |                                  |
|-------------------|----------------------|--------------------|----------------------------------|
| Purity            | Purity__c            | Number(2, 0)       | <input type="button" value="▼"/> |
| Purity Gold Price | Purity_Gold_Price__c | Formula (Currency) | <input type="button" value="▼"/> |

## 2. Picklist Field

|           |              |                    |                                  |
|-----------|--------------|--------------------|----------------------------------|
| Item type | Item_type__c | Picklist           | <input type="button" value="▼"/> |
| KDM       | KDM__c       | Formula (Currency) | <input type="button" value="▼"/> |

Item Custom Field  
**Item type**  
Back to Item

Validation Rules ⓘ

[Edit](#) | [Set Field Level Security](#) | [View Field Accessibility](#) | [Where is this used?](#)

**Custom Field Definition Detail**

|   |   |          |                          |                      |   |
|---|---|----------|--------------------------|----------------------|---|
| <b>Field Information</b>  | <b>Object Name</b> <b>Item</b><br><b>Data Type</b> <b>Picklist</b>  |          |                          |                      |   |
| Field Label <b>Item type</b>  |   |          |                          |                      |   |
| Field Name <b>Item_type__c</b>  |   |          |                          |                      |   |
| API Name <b>Item_type_c</b>   |   |          |                          |                      |   |
| Description   |   |          |                          |                      |   |
| Help Text   |   |          |                          |                      |   |
| Data Owner  |   |          |                          |                      |   |
| Field Usage   |   |          |                          |                      |   |
| Data Sensitivity Level  |   |          |                          |                      |   |
| Compliance Categorization   |   |          |                          |                      |   |
| Created By <a href="#">Shreya Choudhary</a> , 27/07/2024, 10:23 pm  | Modified By <a href="#">Shreya Choudhary</a> , 27/07/2024, 10:23 pm |          |                          |                      |   |
| <b>General Options</b>  |   |          |                          |                      |   |
| Required <input type="checkbox"/>   |   |          |                          |                      |   |
| Default Value <input type="text" value=""/>   |   |          |                          |                      |   |
| <b>Picklist Options</b>   |   |          |                          |                      |   |
| Restrict picklist to the values defined in the value set <input checked="" type="checkbox"/>  |   |          |                          |                      |   |
| Controlling Field <input type="text" value=""/>   |   |          |                          |                      |   |
| <b>Picklist Values Used</b>   |   |          |                          |                      |   |
| Active and inactive picklist values 2 (1,000 max)   |   |          |                          |                      |   |
| <b>Field Dependencies</b>   | <a href="#">Field Dependencies Help</a> ⓘ                           |          |                          |                      |   |
| No dependencies defined.  |   |          |                          |                      |   |
| <b>Validation Rules</b>   | <a href="#">Validation Rules Help</a> ⓘ                             |          |                          |                      |   |
| No validation rules defined.  |   |          |                          |                      |   |
| <b>Values</b>   | <a href="#">Values Help</a> ⓘ                                       |          |                          |                      |   |
| <a href="#">New</a>   <a href="#">Reorder</a>   <a href="#">Replace</a>   <a href="#">Printable View</a>   <a href="#">Chart Colors</a> ▾ |   |          |                          |                      |   |
| <a href="#">Delete Selected</a>   <a href="#">Deactivate Selected</a>   <a href="#">Replace Selected</a>                                  |   |          |                          |                      |   |
| <input type="checkbox"/> Action   | Values  | API Name | Default                  | Chart Colors         | Modified By   |
| <input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>  | Gold  | Gold     | <input type="checkbox"/> | Assigned dynamically | <a href="#">Shreya Choudhary</a> , 27/07/2024, 10:23 pm |
| <input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>  | Silver  | Silver   | <input type="checkbox"/> | Assigned dynamically | <a href="#">Shreya Choudhary</a> , 27/07/2024, 10:23 pm |

## 3. Formula Field

|            |               |                    |                                  |
|------------|---------------|--------------------|----------------------------------|
| Gold Price | Gold_Price__c | Formula (Currency) | <input type="button" value="▼"/> |
|            |               |                    | <input type="button" value="▼"/> |

Item Custom Field  
**Gold Price**

[Back to Item](#) [Help for this Page](#)

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**Custom Field Definition Detail**

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

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**Field Information**

|                           |                                       |             |                                       |
|---------------------------|---------------------------------------|-------------|---------------------------------------|
| Field Label               | Gold Price                            | Object Name | Item                                  |
| Field Name                | Gold_Price                            |             |                                       |
| API Name                  | Gold_Price__c                         |             |                                       |
| Description               |                                       |             |                                       |
| Help Text                 |                                       |             |                                       |
| Data Owner                |                                       |             |                                       |
| Field Usage               |                                       |             |                                       |
| Data Sensitivity Level    |                                       |             |                                       |
| Compliance Categorization |                                       |             |                                       |
| Created By                | Shruti Choudhary, 29/07/2024, 6:37 pm | Modified By | Shruti Choudhary, 29/07/2024, 6:37 pm |

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**Formula Options**

|                              |         |
|------------------------------|---------|
| Data Type                    | Formula |
| Decimal Places               | 2       |
| Prices__r.Gold_price__c / 10 |         |

Field Label:Customer Name      Lookup Relationship with Jewel Customer Object

Ornament      Text(20)

Weight      Number  
(Length=8,Decimal=5)

Stone Weight      Number  
(Length=5,Decimal=5)

Percentage      Number  
(Length=2,Decimal=0)

Stone/Other Price      Currency  
(Length=8,Decimal=2)

Expected Days Of Return

- 1-3 Days
- 4-5 Days
- 6-7 Days
- 8-10 Days

Priority

- Picklist
- Low
- Medium
- High
- Critical

|                   |   |
|-------------------|---|
| Silver Price      | <p>Formula<br/>           (Return Type:Number)<br/>           (Decimal=3)</p> <hr/> $(\text{Prices\_r.Silver\_price\_c} / 1000)$  |
| Purity Gold Price | <p>Formula<br/>           (Return Type:Currency)<br/>           (Decimal=2)</p> <hr/> $((\text{Prices\_r.Gold\_price\_c} * \text{Purity\_c}) / 24) / 10$  |
| Total Weight      | <p>Formula<br/>           (Return Type:Number)<br/>           (Decimal=3)</p> <hr/> $(\text{Weight\_c} - \text{Stone_weight\_c})$   |
| Amount            | <p>Formula<br/>           (Return Type:Currency)<br/>           (Decimal=3)</p> <hr/> $\text{IF}(\text{ISPICKVAL}(\text{Item_Type\_c}, "Gold"), \text{Total_weight\_c} * \text{Purity_Gold_price\_c}, 0)$ |
| KDM               | <p>Formula<br/>           (Return Type:Currency)<br/>           (Decimal=0)</p> <hr/> $(\text{Amount\_c} * \text{Percentage\_c}) / 100$   |
| Making Charges    | <p>Formula<br/>           (Return Type:Currency)<br/>           (Decimal=0)</p> <hr/> $\text{IF}(\text{ISPICKVAL}(\text{Item_Type\_c}, "Gold"), \text{Weight\_c} * 300, \text{Weight\_c} * 10)$           |

**Fields & Relationships** (23 Items, Sorted by Field Label)

| FIELD LABEL             | FIELD NAME                | DATA TYPE              | CONTROLLING FIELD | INDEXED |
|-------------------------|---------------------------|------------------------|-------------------|---------|
| Amount                  | Amount_c                  | Formula (Currency)     |                   |         |
| Created By              | CreatedById               | 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            |                   | ✓       |
| Item type               | Item_type_c               | Picklist               |                   |         |
| KDM                     | KDM_c                     | Formula (Currency)     |                   |         |
| Last Modified By        | LastModifiedById          | Lookup(User)           |                   |         |
| Making Charges          | Making_Charges_c          | Formula (Currency)     |                   |         |

**Fields & Relationships** (23 Items, Sorted by Field Label)

| FIELD LABEL       | FIELD NAME          | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|-------------------|---------------------|--------------------|-------------------|---------|
| Ornament          | Ornament_c          | Text(20)           |                   |         |
| Owner             | OwnerId             | Lookup(User,Group) |                   | ✓       |
| Percentage        | Percentage_c        | Number(2, 0)       |                   |         |
| Prices            | Prices_c            | Lookup(Price)      |                   | ✓       |
| Priority          | Priority_c          | Picklist           |                   |         |
| Purity            | Purity_c            | Number(2, 0)       |                   |         |
| Purity Gold Price | Purity_Gold_Price_c | Formula (Currency) |                   |         |
| Record Type       | RecordTypeid        | Record Type        |                   | ✓       |
| Silver Price      | Silver_Price_c      | Formula (Number)   |                   |         |
| Stone Weight      | Stone_Weight_c      | Number(5, 5)       |                   |         |
| Stone/Other Price | Stone_Other_Price_c | Currency(8, 2)     |                   |         |

| FIELD LABEL  | FIELD NAME     | DATA TYPE        | CONTROLLING FIELD | INDEXED |
|--------------|----------------|------------------|-------------------|---------|
| Total Weight | Total_Weight_c | Formula (Number) |                   |         |
| Weight       | Weight_c       | Number(8, 5)     |                   |         |

## • Creating Field in Price Object

### 1. Currency Field

| Object Manager             |                         |                 |             |               |          |
|----------------------------|-------------------------|-----------------|-------------|---------------|----------|
| 4 Items, Sorted by Label   |                         |                 |             |               |          |
| LABEL                      | API NAME                | TYPE            | DESCRIPTION | LAST MODIFIED | DEPLOYED |
| Cart Item Price Adjustment | CartItemPriceAdjustment | Standard Object |             |               |          |
| Price                      | Price__c                | Custom Object   |             | 29/07/2024    | ✓        |

## 2. Silver Price

| Fields & Relationships |                  |                    |                   |         |  |
|------------------------|------------------|--------------------|-------------------|---------|--|
| FIELD LABEL            | FIELD NAME       | DATA TYPE          | CONTROLLING FIELD | INDEXED |  |
| Created By             | CreatedById      | Lookup(User)       |                   |         |  |
| Gold price             | Gold_price__c    | Currency(8, 5)     |                   |         |  |
| Last Modified By       | LastModifiedById | Lookup(User)       |                   |         |  |
| Owner                  | OwnerId          | Lookup(User,Group) |                   | ✓       |  |
| Price                  | Name             | Auto Number        |                   | ✓       |  |
| Silver Price           | Silver_Price__c  | Currency(8, 5)     |                   |         |  |

## • Creating Field in Billing Object

-----Task to be done

|                   |   |                    |  |
|-------------------|---|--------------------|--|
| Field Label:Item  | Lookup Relationship with Item Object                                  |                    |  |
| Ornament          | Formula<br>(Return Type:Text)   |                    |  |
| Stone weight      | Formula<br>(Return Type:Number)<br>(Decimal=2)                        | KDM Charge         | Formula<br>(Return Type:Currency)<br>(Decimal=0)<br>Item__r.KDM__c   |
| Weight            | Formula<br>Return Type:Number<br>(Decimal=2)                          | Making Charges     | Formula<br>(Return Type:Currency)<br>(Decimal=2)<br>Item__r.Making_Charges__c  |
| Amount            | Formula<br>(Return Type:Currency)<br>(Decimal=2)<br>Item__r.Amount__c | Stones/other price | Formula<br>(Return Type:Currency)<br>(Decimal=2)<br>Item__r.Stone_other_price__c   |
| Gold/Silver Price | Formula<br>(Return Type:Currency)                                     | Total Amount       | Formula<br>(Return Type:Currency)<br>(Decimal=0)<br>Amount__c +<br>KDM_Charge__c +<br>Stones_other_price__c +<br>Making_Charges__c |

SETUP > OBJECT MANAGER  
Billing

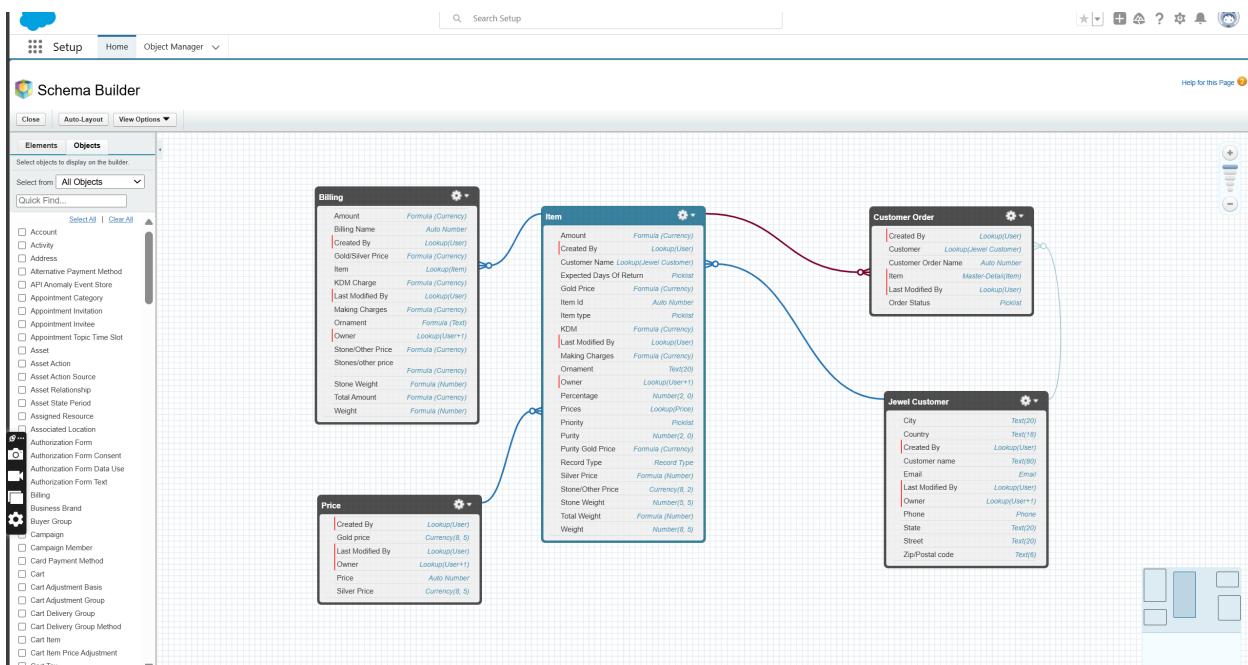
**Fields & Relationships**  
15 Items, Sorted by Field Label

| FIELD LABEL       | FIELD NAME          | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|-------------------|---------------------|--------------------|-------------------|---------|
| Amount            | Amount_c            | Formula (Currency) |                   |         |
| Billing Name      | Name                | Auto Number        |                   | ✓       |
| Created By        | CreatedById         | Lookup(User)       |                   |         |
| Gold/Silver Price | Gold_Silver_Price_c | Formula (Currency) |                   |         |
| Item              | Item_c              | Lookup(Item)       |                   | ✓       |
| KDM Charge        | KDM_Charge_c        | Formula (Currency) |                   |         |
| Last Modified By  | LastModifiedById    | Lookup(User)       |                   |         |
| Making Charges    | Making_Charges_c    | Formula (Currency) |                   |         |
| Ornament          | Ornament_c          | Formula (Text)     |                   |         |
| Owner             | OwnerId             | Lookup(User,Group) |                   | ✓       |
| Stone Weight      | Stone_Weight_c      | Formula (Number)   |                   |         |

|                         |                    |                      |                    |  |
|-------------------------|--------------------|----------------------|--------------------|--|
| Related Lookup Filters  | Stone Weight       | Stone_Weight_c       | Formula (Number)   |  |
| Search Layouts          | Stone/Other Price  | Stone_Other_Price_c  | Formula (Currency) |  |
| List View Button Layout | Stones/other price | Stones_other_price_c | Formula (Currency) |  |
| Restriction Rules       | Total Amount       | Total_Amount_c       | Formula (Currency) |  |
| Scoping Rules           | Weight             | Weight_c             | Formula (Number)   |  |
| Triggers                |                    |                      |                    |  |
| Flow Triggers           |                    |                      |                    |  |

## Schema Builder



## Creating the Field dependencies

## Step 1

The screenshot shows the Salesforce Object Manager for the 'Item' object. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, etc. The main area is titled 'Fields & Relationships' and contains four entries:

| Field Name | Label         | Type               |
|------------|---------------|--------------------|
| Owner      | Ownerid       | Lookup(User,Group) |
| Percentage | Percentage__c | Number(2, 0)       |
| Prices     | Prices__c     | Lookup(Price)      |
| Priority   | Priority__c   | Picklist           |

## Step 2

The screenshot shows the Salesforce Object Manager for the 'Item' object, specifically the 'Field Dependencies' section. The sidebar is the same as in Step 1. The main area shows a table of dependencies:

| Action     | Dependent Field         | Data Type | Modified By                           |
|------------|-------------------------|-----------|---------------------------------------|
| Edit   Del | Expected Days Of Return | Picklist  | Shruti Choudhary, 28/07/2024, 1:05 am |

## • Creating the Validation rules

The screenshot shows the Salesforce Object Manager for the 'Jewel Customer' object. The sidebar lists various setup categories. The main area is titled 'Validation Rules' and displays two rules:

| Rule Name                              | Error Location  | Error Message               | Active | Modified By                           |
|--|-----------------|-----------------------------|--------|---------------------------------------|
| Postal_Code                            | Zip/Postal code | Must contain 6 digits       | ✓      | Shruti Choudhary, 28/07/2024, 1:09 am |
| ValidationRule_For_JewelCustomerObject | Top of Page     | Please fill Required fields | ✓      | Shruti Choudhary, 29/07/2024, 6:57 pm |

# Task 6. Profiles

## ● Creating Goldsmith Profile

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected under 'Users'. The search bar at the top left contains 'profiles'. The main area displays a table titled 'Profiles' with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. Two profiles are listed: 'Gold Partner User' (User License: Gold Partner, Custom: checked) and 'Gold Smith' (User License: Salesforce, Custom: checked). A navigation bar at the bottom includes links for 'Edit', 'Clone', 'Delete', and 'View Users'.

The screenshot shows the Salesforce Setup interface with the 'Profile' tab selected under 'Users'. The search bar at the top left contains 'profiles'. The main area displays the 'Profile Detail' for 'Gold Smith'. The profile has a name of 'Gold Smith', a user license of 'Salesforce', and was created by 'Shruti Choudhary' on '28/07/2024, 1:14 am'. It was last modified by 'Shruti Choudhary' on '29/07/2024, 7:44 pm'. The 'Page Layouts' section shows various standard object layouts assigned to the profile. A vertical toolbar on the left side features icons for search, refresh, and other setup functions.

## ● Creating Worker Profile

The screenshot shows the Salesforce Setup interface with the following details:

- Setup Home:** The top navigation bar includes "Setup", "Home", and "Object Manager".
- Search Bar:** A search bar on the left sidebar contains the query "profiles".
- Left Sidebar:** Under "Users", the "Profiles" section is selected. A message says "Didn't find what you're looking for? Try using Global Search." Below it, another search bar also shows "profiles".
- Profiles Page:** The main content area is titled "Profiles" under "SETUP". It shows a table of profiles with columns: Action, Profile Name, User License, and Custom. One row is selected for "Work.com Only User" (User License: Work.com Only, Custom: checked).
- Worker Profile Detail:** A modal window titled "Worker Profile" provides detailed information about the selected profile. It includes fields for Name (Worker Profile), User License (Salesforce Platform), Description, Created By (Shruti Choudhary, 28/07/2024, 1:18 am), Modified By (Shruti Choudhary, 29/07/2024, 7:44 pm), and a "Profile Detail" section with tabs for Edit, Clone, Delete, and View Users.
- Page Layouts:** The "Page Layouts" section lists standard object layouts for various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, and Asset.

## Task 7. Roles

- Creating Goldsmith Role

Setup Home Object Manager

roles

Users Roles

Feature Settings

Sales Contact Roles on Contracts Contact Roles on Opportunities

Service Case Teams Case Team Roles Contact Roles on Cases

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

**SETUP Roles**

### Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

**Sample Role Hierarchy**

View other sample Role Hierarchies: [Territory-based Sample](#)

```

graph TD
    CEO[CEO President] --> CFO[CFO VP, Sales]
    CFO --> COO[COO]
    COO --> ISD[International Sales Director]
    ISD --> WSD[Western Sales Director]
    ISD --> ESD[Eastern Sales Director]
    ISD --> ISD[International Sales Director]
    WSD --> WSR[Western Sales Rep]
    WSD --> CTR[CA Sales Rep]
    ESD --> ESR[NY Sales Rep]
    ESD --> MASR[MA Sales Rep]
    ISD --> ASR[Asian Sales Rep]
    ISD --> ESR[European Sales Rep]
  
```

\* View & edit data, roll up forecasts, & generate reports  
\* Add users directly  
\* Can't access data of other Executive staff

\* View & edit data, roll up forecasts, & generate reports  
\* Add users directly  
\* Can't access data of other Sales Director at same level

\* View & edit data, roll up forecasts, & generate reports  
\* Add users directly  
\* Can't access data of other Sales Director above or at same level

**Set Up Roles**

Don't show this page again

Setup Home Object Manager

roles

Users Roles

Feature Settings

Sales Contact Roles on Contracts Contact Roles on Opportunities

Service Case Teams Case Team Roles Contact Roles on Cases

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

**SETUP Roles**

### 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**

KIET Group of Institutions

- 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
- SVP, Customer Service & Support [Edit](#) [Del](#) [Assign](#)
- Add Role
- Customer Support, International [Edit](#) [Del](#) [Assign](#)
- Add Role
- Customer Support, North America [Edit](#) [Del](#) [Assign](#)
- Add Role
- Installation & Repair Services [Edit](#) [Del](#) [Assign](#)
- Add Role
- SVP, Human Resources [Edit](#) [Del](#) [Assign](#)
- Add Role
- SVP, Sales & Marketing [Edit](#) [Del](#) [Assign](#)
- Add Role
- VP, International Sales [Edit](#) [Del](#) [Assign](#)
- Add Role
- VP, Marketing [Edit](#) [Del](#) [Assign](#)
- Add Role
- Marketing Team [Edit](#) [Del](#) [Assign](#)
- Add Role
- VP, North American Sales [Edit](#) [Del](#) [Assign](#)
- Add Role
- Director, Channel Sales [Edit](#) [Del](#) [Assign](#)
- Add Role
- Channel Sales Team [Edit](#) [Del](#) [Assign](#)
- Add Role
- Director, Direct Sales [Edit](#) [Del](#) [Assign](#)
- Add Role
- Eastern Sales Team [Edit](#) [Del](#) [Assign](#)
- Add Role
- Western Sales Team [Edit](#) [Del](#) [Assign](#)
- Add Role

...

# Gold Smith Role

**Role Detail**

| Action | Full Name         | Alias | Username             | Active |
|--------|-------------------|-------|----------------------|--------|
| Edit   | Niklaus Mikaelson | nmika | nick783249@nick.nick | ✓      |

## Worker Role

**Role Detail**

| Action | Full Name           | Alias | Username         | Active |
|--------|---------------------|-------|------------------|--------|
| Edit   | Kol Mikaelson       | kmika | kola9368@ola.ola | ✓      |
| Edit   | Zach Dempsey        | zdemp | zachy@gmail.com  | ✓      |
| Edit   | Paxton Hall Yoshida | phall | paxton@gmail.com | ✓      |

## Task 8. Users

### ● Create User

#### Task to do:

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

User Detail

|                                 |   |                                   |   |
|---------------------------------|---|-----------------------------------|---|
| Name                            | Niklaus Mikaelson   | Role                              | Gold Smith                                    |
| Alias                           | nnika   | User License                      | Salesforce                                    |
| Email                           | shrutichoudhary576@gmail.com [Verify]   | Profile                           | Gold Smith                                    |
| Username                        | nick783249@nick.nick  | Active                            | <input checked="" type="checkbox"/>           |
| Nickname                        | User17221100140482313394  | Marketing User                    | <input type="checkbox"/>                      |
| Title                           |   | Offline User                      | <input type="checkbox"/>                      |
| Company                         |   | Knowledge User                    | <input type="checkbox"/>                      |
| Department                      |   | Flow User                         | <input type="checkbox"/>                      |
| Division                        |   | Service Cloud User                | <input type="checkbox"/>                      |
| Address                         | Radhey Shyam Vihar phase 6 , Muradnagar (gzb)<br>Ghaziabad 201206<br>Uttar Pradesh<br>India | Site.com Contributor User         | <input type="checkbox"/>                      |
| Time Zone                       | (GMT+05:30) India Standard Time (Asia/Kolkata)  | Site.com Publisher User           | <input type="checkbox"/>                      |
| Locale                          | English (India)   | WDC User                          | <input type="checkbox"/>                      |
| Language                        | English   | Mobile Push Registrations         | <input type="checkbox"/> View                 |
| Delegated Approver              |   | Data.com User Type                | <input type="checkbox"/> <a href="#">View</a> |
| Manager                         |   | Accessibility Mode (Classic Only) | <input type="checkbox"/> <a href="#">View</a> |
| Receive Approval Request Emails | Only if I am an approver  | Debug Mode                        | <input type="checkbox"/> <a href="#">View</a> |
| Federation ID                   |   | High-Contrast Palette on Charts   | <input type="checkbox"/> <a href="#">View</a> |

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.

User Detail

|                                     |  |                                      |   |
|-------------------------------------|--|--------------------------------------|---|
| Name                                | Kol Mikaelson                                  | Role                                 | Worker  |
| Alias                               | kmika  | User License                         | Salesforce Platform                           |
| Email                               | shrutichoudhary576@gmail.com [Verify]          | Profile                              | Worker Profile                                |
| Username                            | kola9368@ola.ola                               | Active                               | <input checked="" type="checkbox"/>           |
| Nickname                            | User17221100140482313394                       | Marketing User                       | <input type="checkbox"/>                      |
| Title                               |  | Offline User                         | <input type="checkbox"/>                      |
| Company                             |  | Knowledge User                       | <input type="checkbox"/>                      |
| Department                          |  | Flow User                            | <input type="checkbox"/>                      |
| Division                            |  | Service Cloud User                   | <input type="checkbox"/>                      |
| Address                             | Ghaziabad 201206<br>Uttar Pradesh<br>India     | Site.com Contributor User            | <input type="checkbox"/>                      |
| Time Zone                           | (GMT+05:30) India Standard Time (Asia/Kolkata) | Site.com Publisher User              | <input type="checkbox"/>                      |
| Locale                              | English (India)                                | WDC User                             | <input type="checkbox"/>                      |
| Language                            | English  | Mobile Push Registrations            | <input type="checkbox"/> View                 |
| Delegated Approver                  |  | Data.com User Type                   | <input type="checkbox"/> <a href="#">View</a> |
| Manager                             |  | Accessibility Mode (Classic Only)    | <input type="checkbox"/> <a href="#">View</a> |
| Receive Approval Request Emails     | Only if I am an approver                       | Debug Mode                           | <input type="checkbox"/> <a href="#">View</a> |
| Federation ID                       |  | High-Contrast Palette on Charts      | <input type="checkbox"/> <a href="#">View</a> |
| App Registration: One-Time Password | <a href="#">View</a>                           | Load Lightning Pages While Scrolling | <input checked="" type="checkbox"/>           |

## Two more Users

User Detail

**Zach Dempsey**

Name: Zach Dempsey  
Alias: zdemp  
Email: shruti\_nblik@gmail.com (Verify)  
Username: zacky@gmail.com  
Nickname: User17221102743467136204  
Title:  
Company:  
Department:  
Division:  
Address: India  
Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)  
Locale: English (India)  
Language: English  
Delegated Approver:  
Manager:  
Receive Approval Request Emails: Only if I am an approver  
Federation ID:  
App Registration: One-Time Password Authenticator:  
App Registration: Salesforce Authenticator:

Role: Worker  
User License: Salesforce Platform Profile: Worker Profile  
Active: ✓  
Marketing User:   
Offline User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:   
Mobile Push Registrations: View  
Data.com User Type:   
Accessibility Mode (Classic Only):  ⓘ  
Debug Mode:  ⓘ  
High-Contrast Palette on Charts:  ⓘ  
Load Lightning Pages While Scrolling: ✓ ⓘ  
Salesforce CRM Content User: ✓

User Detail

**Paxton Hall Yoshida**

Name: Paxton Hall Yoshida  
Alias: phall  
Email: shruti\_nblik@gmail.com (Verify)  
Username: paxton@gmail.com  
Nickname: User17hhjijis221102743467136204  
Title:  
Company:  
Department:  
Division:  
Address: India  
Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)  
Locale: English (India)  
Language: English  
Delegated Approver:  
Manager:  
Receive Approval Request Emails: Only if I am an approver  
Federation ID:  
App Registration: One-Time Password Authenticator:  
App Registration: Salesforce Authenticator:

Role: Worker  
User License: Salesforce Platform Profile: Worker Profile  
Active: ✓  
Marketing User:   
Offline User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:   
Mobile Push Registrations: View  
Data.com User Type:   
Accessibility Mode (Classic Only):  ⓘ  
Debug Mode:  ⓘ  
High-Contrast Palette on Charts:  ⓘ  
Load Lightning Pages While Scrolling: ✓ ⓘ  
Salesforce CRM Content User: ✓

## Task 9. Page Layouts

Setup > OBJECT MANAGER > Item

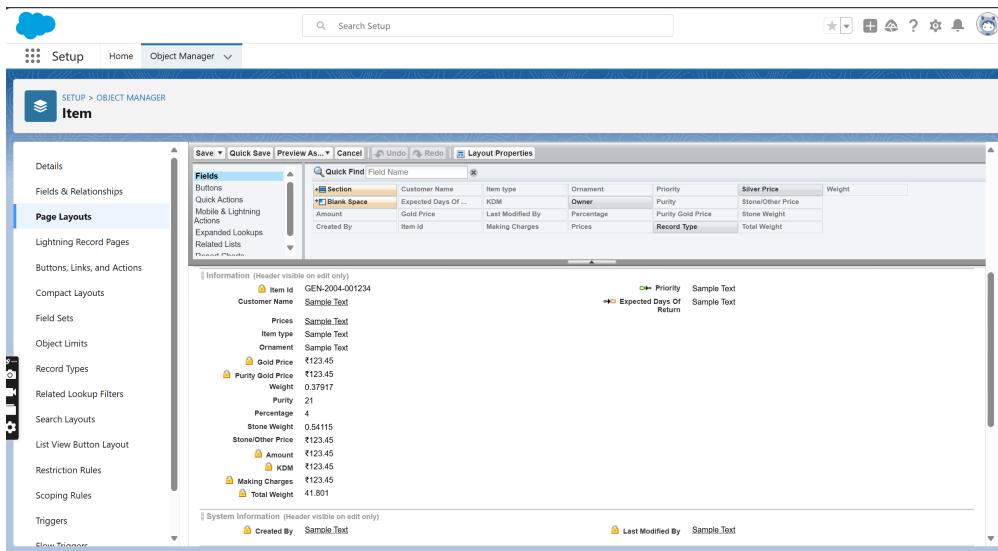
**Page Layouts**

3 items. Sorted by Page Layout Name

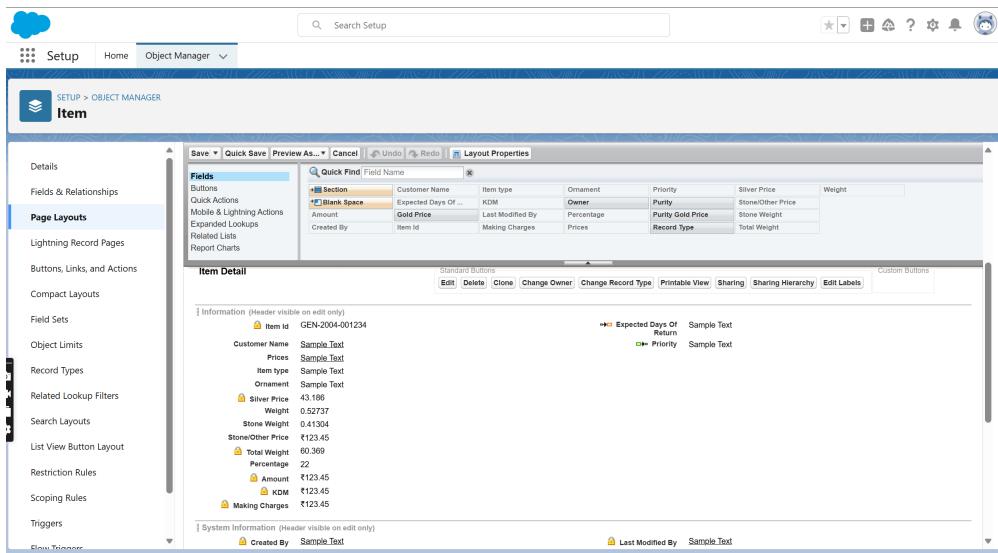
| PAGE LAYOUT NAME       | CREATED BY                            | MODIFIED BY                           |
|------------------------|---------------------------------------|---------------------------------------|
| Item Layout            | Shruti Choudhary, 27/07/2024, 9:24 pm | Shruti Choudhary, 29/07/2024, 6:45 pm |
| Page Layout for Gold   | Shruti Choudhary, 28/07/2024, 1:31 am | Shruti Choudhary, 29/07/2024, 7:33 pm |
| Page Layout for Silver | Shruti Choudhary, 28/07/2024, 1:44 am | Shruti Choudhary, 29/07/2024, 7:39 pm |

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  
Triggers

## ● Create a Gold page layout



## ● Create a Silver page layout



# Task 10. Record Types

The screenshot shows the Salesforce Setup interface for the 'Item' object. The left sidebar has 'Record Types' selected under 'Object Manager'. The main area displays a table titled 'Record Types' with two items: 'Gold' and 'Silver'. The 'Gold' record type is active and has a description of 'Gold items information'. The 'Silver' record type is also active and has a description of 'Silver items information'. Both records were modified by 'Shruti Choudhary' on 29/07/2024.

| RECORD TYPE LABEL | DESCRIPTION              | ACTIVE | MODIFIED BY                           |
|-------------------|--------------------------|--------|---------------------------------------|
| Gold              | Gold items information   | ✓      | Shruti Choudhary, 29/07/2024, 7:42 pm |
| Silver            | Silver items information | ✓      | Shruti Choudhary, 29/07/2024, 7:44 pm |

The screenshot shows the details for the 'Gold' record type. The left sidebar has 'Record Types' selected. The main area shows the 'Record Type Gold' page with fields like Record Type Label (Gold), Record Type Name (Gold), Namespace Prefix (None), Description (Gold items information), Created By (Shruti Choudhary), and Modified By (Shruti Choudhary). Below this, a 'Picklists Available for Editing' section lists three picklist values: 'Expected Days Of Return', 'Item type', and 'Priority'.

The screenshot shows the details for the 'Silver' record type. The left sidebar has 'Record Types' selected. The main area shows the 'Record Type Silver' page with fields like Record Type Label (Silver), Record Type Name (Silver), Namespace Prefix (None), Description (Silver items information), Created By (Shruti Choudhary), and Modified By (Shruti Choudhary). Below this, a 'Picklists Available for Editing' section lists three picklist values: 'Expected Days Of Return', 'Item type', and 'Priority'.

## Task 11. Creating permission set

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. The page title is 'Permission Sets'. A table lists a single permission set named 'Per to Worker' with the description 'Publish Suggested for You Nudges: Integration User'. The table includes columns for Action (New, Del | Clone, Clone), Permission Set Label (Per to Worker), Description (Access the Core Adoption Service and tenant orgs, which are ...), and License (Cloud Integration User). Navigation links at the top include 'All Permission Sets', 'Edit', 'Delete', and 'Create New View'. A help link 'Help for this Page' is also present.

The screenshot shows the details of the 'Per to Worker' permission set. The page title is 'Permission Set Per to Worker'. It includes tabs for 'Find Settings...', 'Clone', 'Edit Properties', 'Manage Assignments', and 'View Summary'. The 'Items' tab is selected, showing 'Tab Settings' with 'Available' and 'Visible' sections, and 'Item: Record Type Assignments' where 'Gold' is assigned to 'Assigned Record Types'. The 'Object Permissions' section lists permissions like Read, Create, Edit, Delete, View All, and Modify All, with 'Read', 'Create', and 'Edit' checked as enabled.

## Task 12. User Adoption

- Create a Record (Jewel Customer)
- View a Record(Jewel Customer)
- Delete a Record(Jewel Customer)

Jewellery Inventory ... Jewel Customers

Jewel Customers Recently Viewed

9 items • Updated 11 minutes ago

|   | Customer name       |
|---|---------------------|
| 1 | Tokyo               |
| 2 | Dan Espinoza        |
| 3 | Lucifer Morningstar |
| 4 | Ela                 |
| 5 | nam                 |
| 6 | shyam               |
| 7 | Ram                 |
| 8 | radha               |
| 9 | Shruti              |

## Task 13. Reports

Jewellery Inventory ... Reports

Reports

Recent

2 items

| REPORTS       | Report Name              | Folder          | Created By       | Created On         |
|---------------|--------------------------|-----------------|------------------|--------------------|
| Recent        | New Billings with Item F | Private Reports | Shruti Choudhary | 29/7/2024, 7:48 pm |
| Created by Me | New Prices Report        | Private Reports | Shruti Choudhary | 28/7/2024, 2:33 am |

Shared with Me

FAVORITES

All Favorites

Jewellery Inventory ... Reports Dashboard 1 Dashboard 1 Report Builder

**REPORT ▾**  
New Prices Report **Prices**

Previewing a limited number of records. Run the report to see everything.

|    | Price: Price | Gold price         | Price: ID       |
|----|--------------|--------------------|-----------------|
| 1  | Item-02      | ₹10,00,000.0000    | a05dM000005cMQX |
| 2  | Item-10      | ₹9,35,678.00000    | a05dM000005cNGA |
| 3  | Item-01      | ₹53,000.00000      | a05dM000005cPlg |
| 4  | Item-03      | ₹35,00,000.00000   | a05dM000005cQxt |
| 5  | Item-08      | ₹9,73,462.00000    | a05dM000005cQxu |
| 6  | Item-04      | ₹5,77,509.00000    | a05dM000005cQzV |
| 7  | Item-05      | ₹63,468.00000      | a05dM000005cR17 |
| 8  | Item-06      | ₹63,42,873.00000   | a05dM000005cR2j |
| 9  | Item-07      | ₹30,000.00000      | a05dM000005cR4L |
| 10 | Item-09      | ₹34,687.00000      | a05dM000005cR5x |
| 11 |              | ₹1,35,10,677.00000 |                 |

Report: Prices  
**New Prices Report**

Total Records Total Gold price  
10 ₹1,35,10,677.00000

|    | Price: Price | Gold price         | Price: ID       |
|----|--------------|--------------------|-----------------|
| 1  | Item-02      | ₹10,00,000.00000   | a05dM000005cMQX |
| 2  | Item-10      | ₹9,35,678.00000    | a05dM000005cNGA |
| 3  | Item-01      | ₹53,000.00000      | a05dM000005cPlg |
| 4  | Item-03      | ₹35,00,000.00000   | a05dM000005cQxt |
| 5  | Item-08      | ₹9,73,462.00000    | a05dM000005cQxu |
| 6  | Item-04      | ₹5,77,509.00000    | a05dM000005cQzV |
| 7  | Item-05      | ₹63,468.00000      | a05dM000005cR17 |
| 8  | Item-06      | ₹63,42,873.00000   | a05dM000005cR2j |
| 9  | Item-07      | ₹30,000.00000      | a05dM000005cR4L |
| 10 | Item-09      | ₹34,687.00000      | a05dM000005cR5x |
| 11 |              | ₹1,35,10,677.00000 |                 |

# Task 14. Creating Dashboards

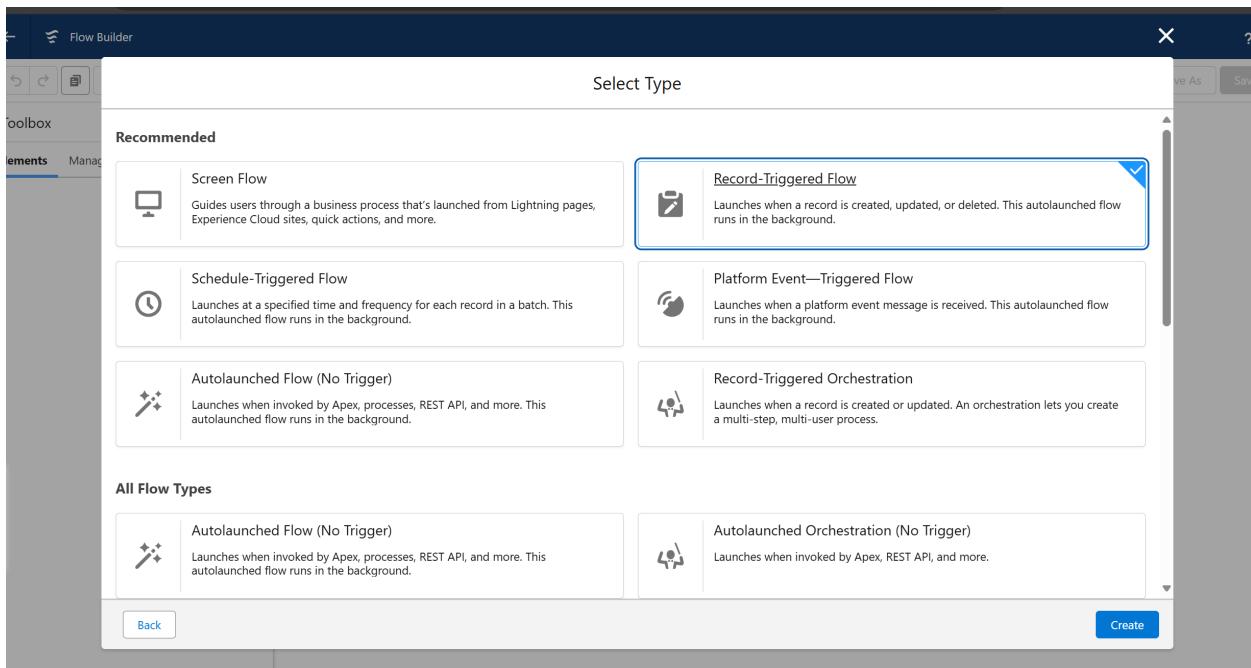
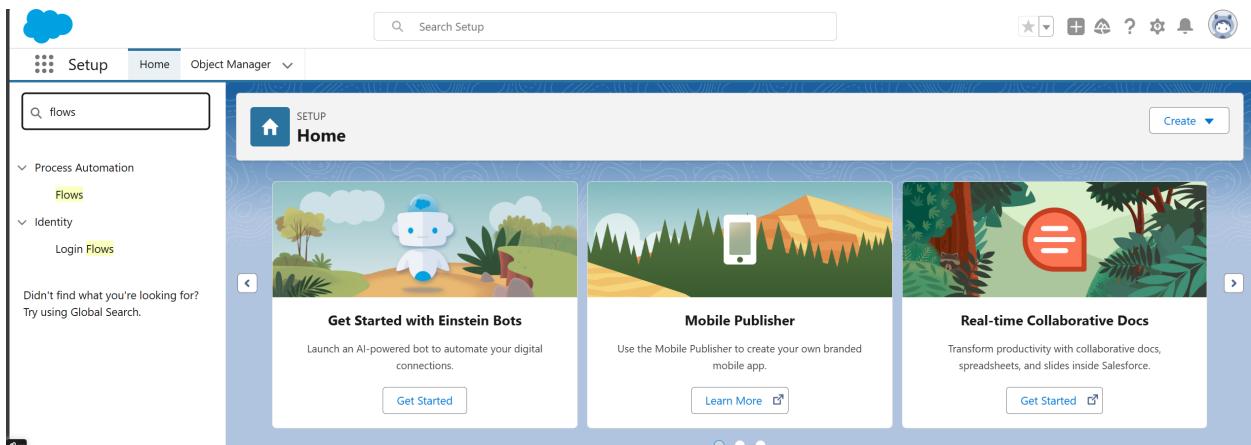
The screenshot shows the 'Jewellery Inventory' application interface. At the top, there is a blue cloud icon, a search bar with placeholder text 'Search...', and a navigation bar with tabs for 'Dashboards', 'Recent', and a clock icon. Below the navigation bar, there are sections for 'Dashboards', 'Recent', and 'Folders'. The 'Recent' section lists 'Dashboard 1' (selected), 'Created by Me', 'Private Dashboards', and 'All Dashboards'. The 'Folders' section lists 'All Folders' and 'Created by Me'. To the right, a sidebar lists various dashboard categories with icons: 'Jewel Customers', 'Items', 'Customer Orders', 'Billings', 'Reports', 'Dashboards' (selected), and 'Prices'. At the bottom right of the sidebar, there is an 'Edit' button.

The screenshot shows the 'Dashboard 1' view within the 'Jewellery Inventory' application. The top navigation bar includes a blue cloud icon, a search bar, and tabs for 'Dashboards', 'New Prices Report', and 'Dashboard 1' (selected). The main content area contains two reports: 'New Billings with Item Report' and 'New Prices Report'. The 'New Billings with Item Report' table has columns for 'Billing: Billing Name' and 'Item: Item Id'. The 'New Prices Report' table has columns for 'Price: Price', 'Gold price', and 'Price: ID'. Both tables show data for items 01 through 07. At the bottom of each report table, there is a link to 'View Report'.

| Billing: Billing Name ↑ | Item: Item Id |
|-------------------------|---------------|
| Item-01                 | Item-10       |
| Item-02                 | Item-09       |
| Item-03                 | Item-08       |
| Item-04                 | Item-07       |
| Item-05                 | Item-06       |
| Item-06                 | Item-10       |
| Item-07                 | Item-09       |

| Price: Price ↑ | Gold price  | Price: ID       |
|----------------|-------------|-----------------|
| Item-01        | ₹53.0000k   | a05dM000005cPlg |
| Item-02        | ₹1.00000m   | a05dM000005cMQX |
| Item-03        | ₹3.50000m   | a05dM000005cQxt |
| Item-04        | ₹577.50900k | a05dM000005cQzV |
| Item-05        | ₹63.46800k  | a05dM000005cR17 |
| Item-06        | ₹6.34287m   | a05dM000005cR2j |
| Item-07        | ₹30.00000k  | a05dM000005cR4L |

# Task 15. Flows



Flow Definitions

All Flows 

43 items • Sorted by Flow Label • Filtered by All flow definitions • Updated 2 minutes ago

| Flow Label ↑                                     | Process Type                   | A...                                | Te...                               | Package State     | Pa...             | Last Modifi...      | Last Modified ... |
|--|--------------------------------|-------------------------------------|-------------------------------------|-------------------|-------------------|---------------------|-------------------|
| Deploy Data Kit Component                        | Autolaunched Flow              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |                   |                     |                   |
| Discount Flow                                    | Screen Flow                    | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Managed-Installed |                   |                     |                   |
| Enablement: Send Feedback Ready Notification     | Autolaunched Flow              | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Managed-Installed |                   |                     |                   |
| Enroll or Unenroll Service Appointment Attendees | Salesforce Scheduler Flow      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |                   |                     |                   |
| Even Exchange Flow                               | Screen Flow                    | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Managed-Installed |                   |                     |                   |
| Exchanges with RMA Returns                       | Screen Flow                    | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Managed-Installed |                   |                     |                   |
| Find Contact Associated with Messaging Session   | Individual-Object Linking Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |                   |                     |                   |
| Flow Created                                     | Autolaunched Flow              | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Unmanaged         | Shruti Choudha... | 29/07/2024, 8:09 pm |                   |
| Generate Appointment Invitation                  | Salesforce Scheduler Flow      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |                   |                     |                   |
| Generate Payment Link                            | Screen Flow                    | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |                   |                     |                   |
| Inbound Cancel Appointment                       | Salesforce Scheduler Flow      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |                   |                     |                   |
| Inbound Modify Appointment                       | Salesforce Scheduler Flow      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |                   |                     |                   |
| Inbound New Appointment                          | Salesforce Scheduler Flow      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |                   |                     |                   |
| Inbound New Guest Appointment                    | Salesforce Scheduler Flow      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |                   |                     |                   |

### Configure Start

Select Object

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

\* Object  
Billing

Configure Trigger

\* Trigger the Flow When:

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

Set Entry Conditions

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

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

Condition Requirements  
None

Configure Start

\* A record is created

- 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  
None

\* Optimize the Flow for:

**Fast Field Updates**

Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.

**Actions and Related Records**

Update any record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

Cancel Done

### Edit Send Email

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

|         |              |
|---------|--------------|
| * Label | * API Name ⓘ |
| notice  | notice       |

Description

**Send Email ⓘ**  
emailSimple-emailSimple

Set Input Values for the Selected Action

- Ⓐ Add Threading Token to Body  Not Included
- Ⓑ Add Threading Token to Subject  Not Included
- Ⓐ Body ⓘ  Included  
Emailbody

**Cancel** **Done**

← ⚡ Flow Builder Flow Created - V2

Free-Form Version 2: Last modified a few seconds ago **Active** Run Debug View Tests Deactivate Save As Save

Toolbox

**Elements Manager**

- Interaction (3)
  - Action
  - Subflow
  - Custom Error
- Logic (6)
  - Assignment
  - Decision
  - Loop
  - Transform
  - Collection Sort
  - Collection Filter
- Data (4)
  - Create Records
  - Update Records
  - Get Records
  - Delete Records

Start Record-Triggered Flow

Object: Billing Edit  
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 notice

Get more on the AppExchange

# THANK YOU

