

## **CRM Application for Jewel Management - (Developer)**

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**Title : CRM Application for Jewel Management - (Developer)**

**Project Overview :**

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.

## **Objectives :**

- **Efficient Inventory Management** – Accurately track jewellery items by type, weight, purity, and pricing.
- **Real-Time Stock Monitoring** – Update inventory levels instantly to prevent stock-outs or overstocking.
- **Sales and Billing Automation** – Automate invoicing, discounts, and payment tracking for faster transactions.
- **Secure Record Keeping** – Maintain a protected database of all inventory and sales activities.
- **User-Friendly Interface** – Ensure easy navigation for users with varying technical skills.
- **Reporting and Analytics** – Provide actionable insights through sales and inventory reports.
- **Role-Based Access Control** – Restrict system access based on user roles to enhance security.

## **Student Outcomes:**

- Practical Inventory Management Skills – Students learn to build systems that track jewellery stock by key attributes like weight and purity.
- Understanding of Retail Business Processes – Students gain insight into how inventory and sales workflows operate in a jewellery business.
- Application Development Lifecycle Experience – Students experience the full project cycle from planning to deployment.
- Database Design and Record-Keeping Proficiency – Students develop skills in designing secure and structured data storage solutions.
- User Interface and Experience Design – Students learn to create intuitive interfaces suited for real-world end users.
- Teamwork and Project Collaboration – Students enhance collaboration skills by working in development teams.
- Exposure to Industry Tools and Concepts – Students become familiar with features like reporting, role-based access, and optional barcode integration.

## **System Requirements :**

### **Hardware Requirements:**

- Computer with min/sum 4 GB RAM, Dual-core processor
- Stable internet connection

### **Software Requirements:**

- Salesforce Developer Edition Org
- Modern Web Browser (e.g., Google Chrome, Firefox)

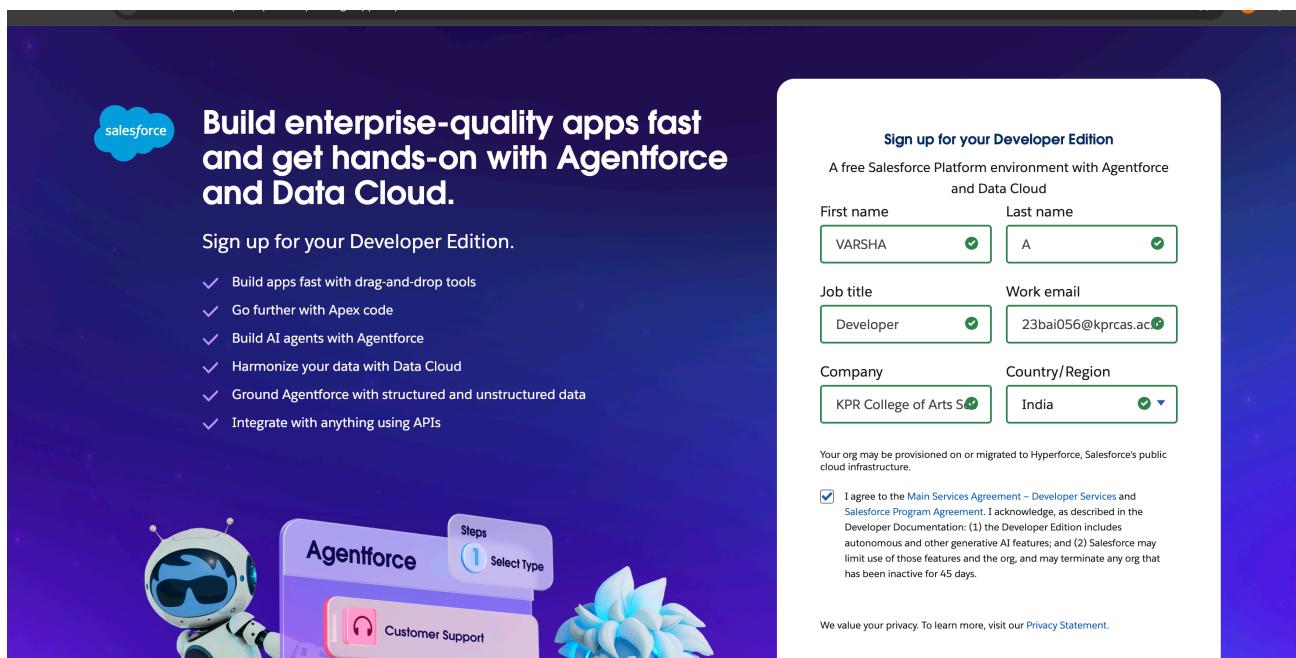
## Creating Developer Account

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :
  3. First name & Last name
  4. Email
  5. Role : Developer
  6. Company : College Name
  7. County : India
  8. Postal Code : pin code
  9. 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

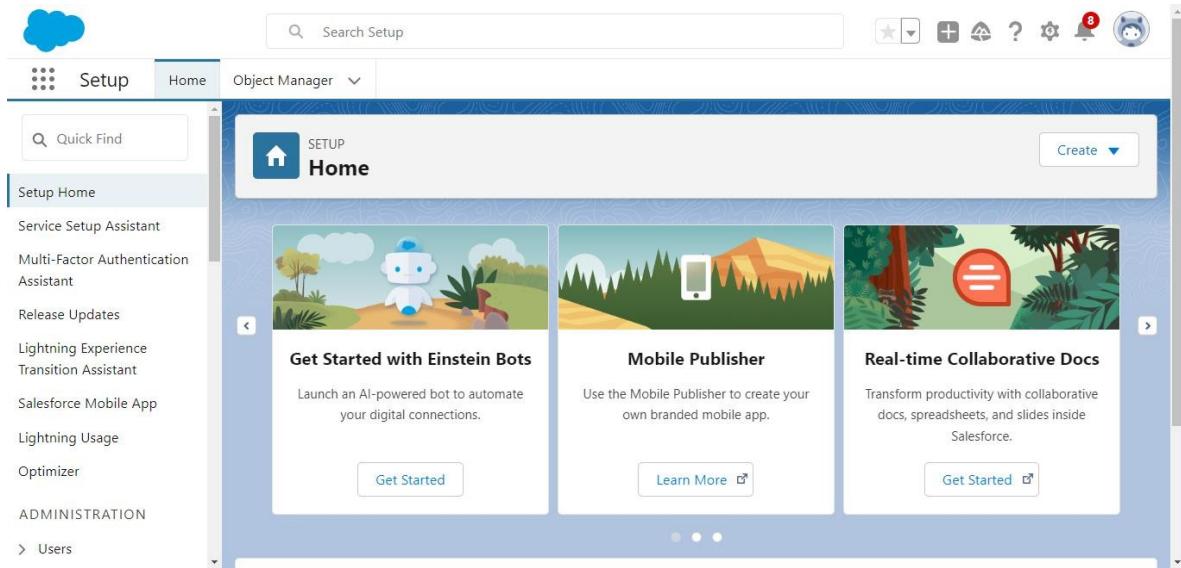
: username@organization.com

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

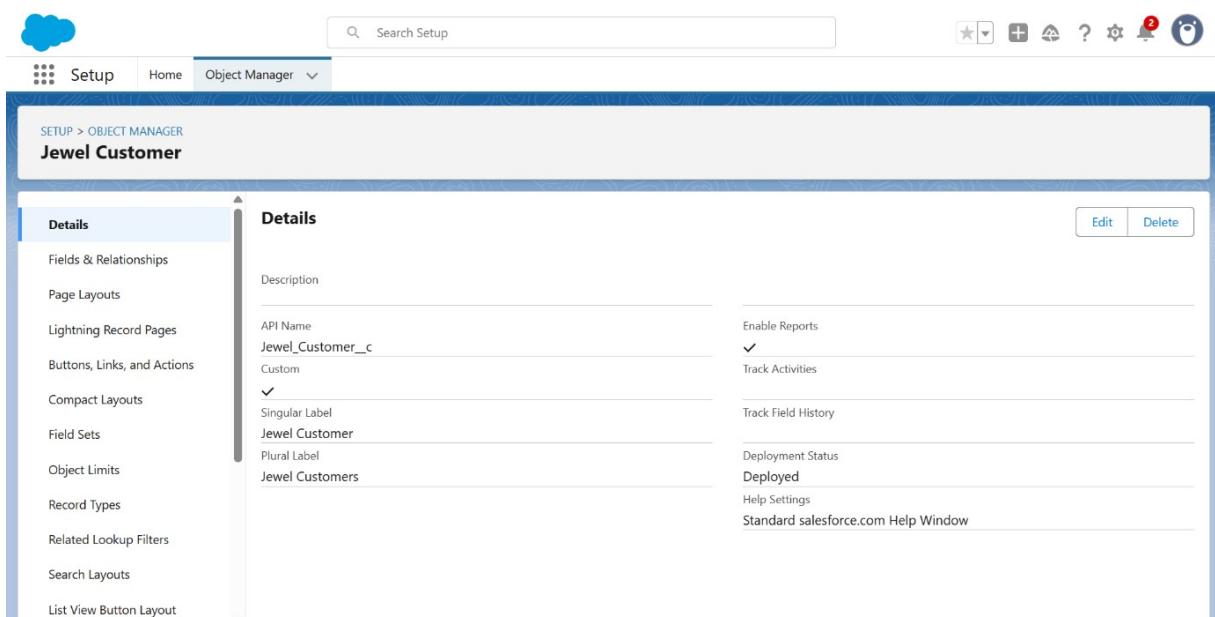


## Create Jewel Customer Object

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.
2. Enter the label name : Jewel Customer
3. Plural label name : Jewel Customers
4. Enter Record Name Label and Format
  - Record Name >> Customer name
  - Data Type >> Text
2. Click on Allow reports.
3. Allow search and click Save.

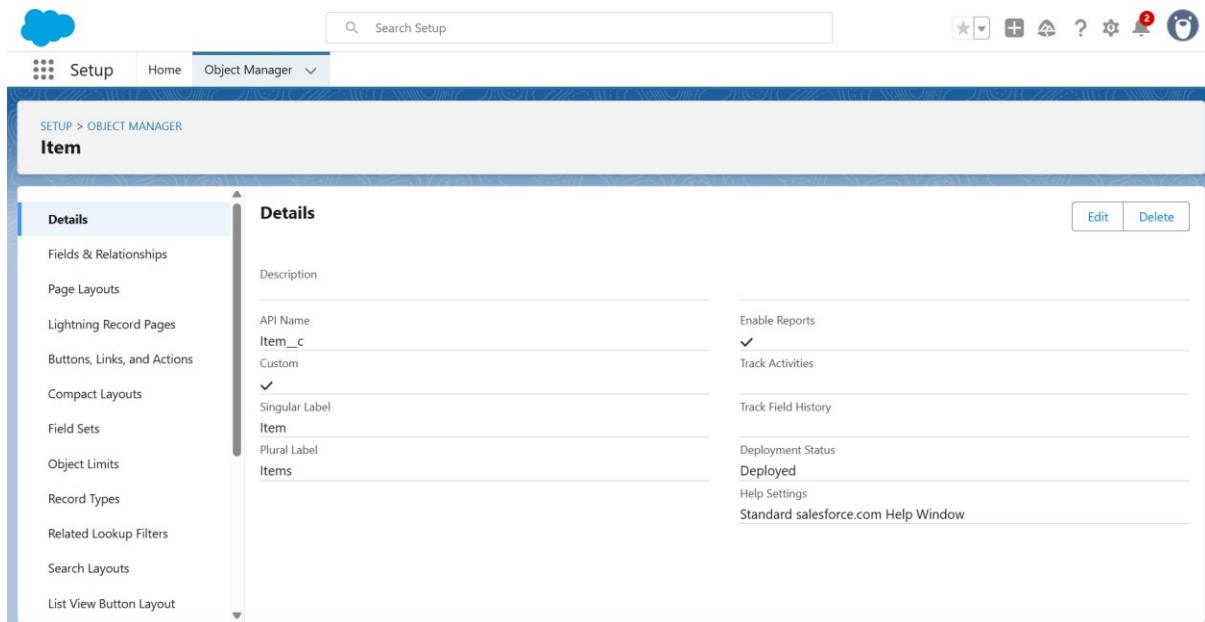


## Create Item Object

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.
  1. Enter the label name >> Item
  2. Plural label name >> Items
  3. Enter Record Name Label and Format
    - Record Name >> Item Id
    - Data Type >> Auto Number
    - Display Format >> Item-{00}
    - Starting Number >> 1
2. Click on Allow reports.
3. Allow search >> Save.



## Create Customer Order 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.
  1. Enter the label name >> Customer Order
  2. Plural label name >> Customer Orders
  3. Enter Record Name Label and Format
    - Record Name >> Customer Order Id
    - Data Type >> Auto Number
    - Display Format >> Item-{00}

- Starting Number >> 1
2. Click on Allow reports.
  3. Allow search >> Save.

Customer Order

**Details**

Description

API Name  
Customer\_Order\_\_c  
Custom  
✓  
Singular Label  
Customer Order  
Plural Label  
Customer Orders

Enable Reports  
✓  
Track Activities

Track Field History

Deployment Status  
Deployed  
Help Settings  
Standard salesforce.com Help Window

Edit Delete

## Create Price 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 >> Price
3. Plural label name >> Prices
4. Enter Record Name Label and Format
  - Record Name >> Price Id
  - Data Type >> Auto Number
  - Display Format >> Item-{00}
  - Starting Number >> 1

5. Click on Allow reports.
6. Allow search >> Save.

Price

**Details**

Description

API Name  
Price\_\_c  
Custom  
✓  
Singular Label  
Price  
Plural Label  
Prices

Enable Reports  
✓  
Track Activities

Track Field History

Deployment Status  
Deployed  
Help Settings  
Standard salesforce.com Help Window

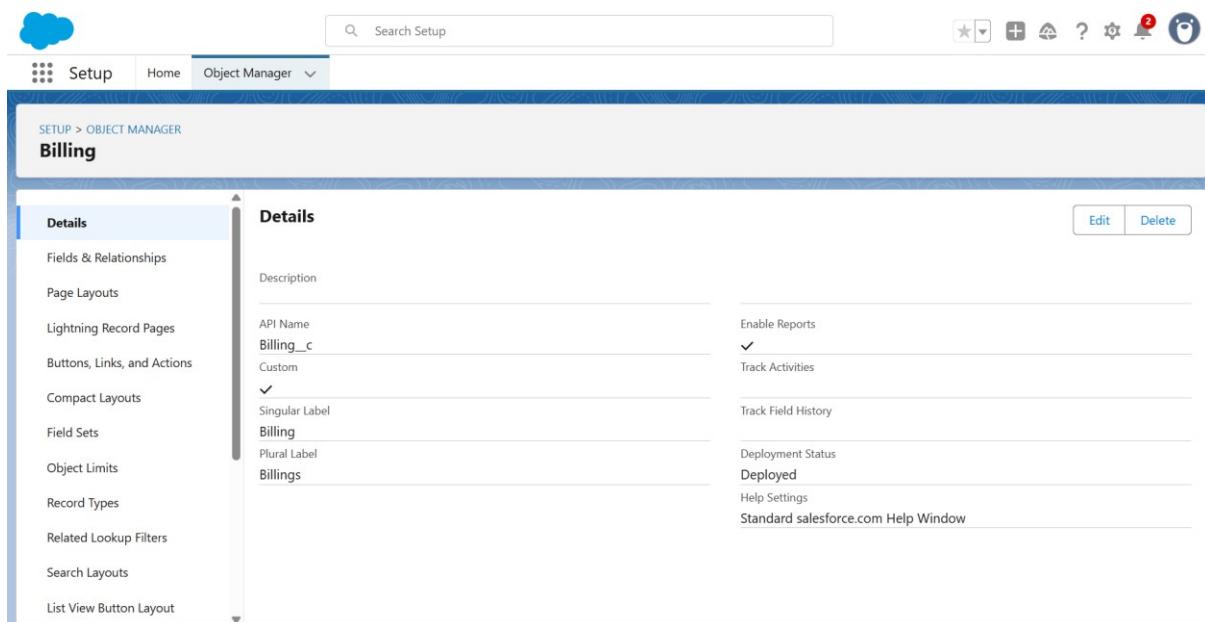
Edit Delete

## Create Billing Object

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

To create an object:

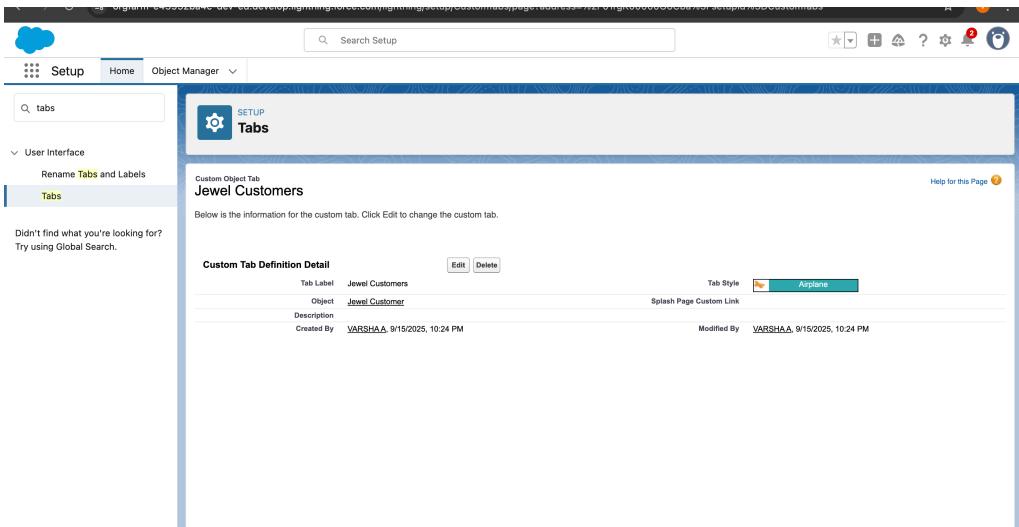
1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
2. Enter the label name >> Billing
3. Plural label name >> Billings
4. Enter Record Name Label and Format
  - Record Name >> Billing Id
  - Data Type >> Auto Number
  - Display Format >> Item-{00}
  - Starting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



## Creating a Custom Tab

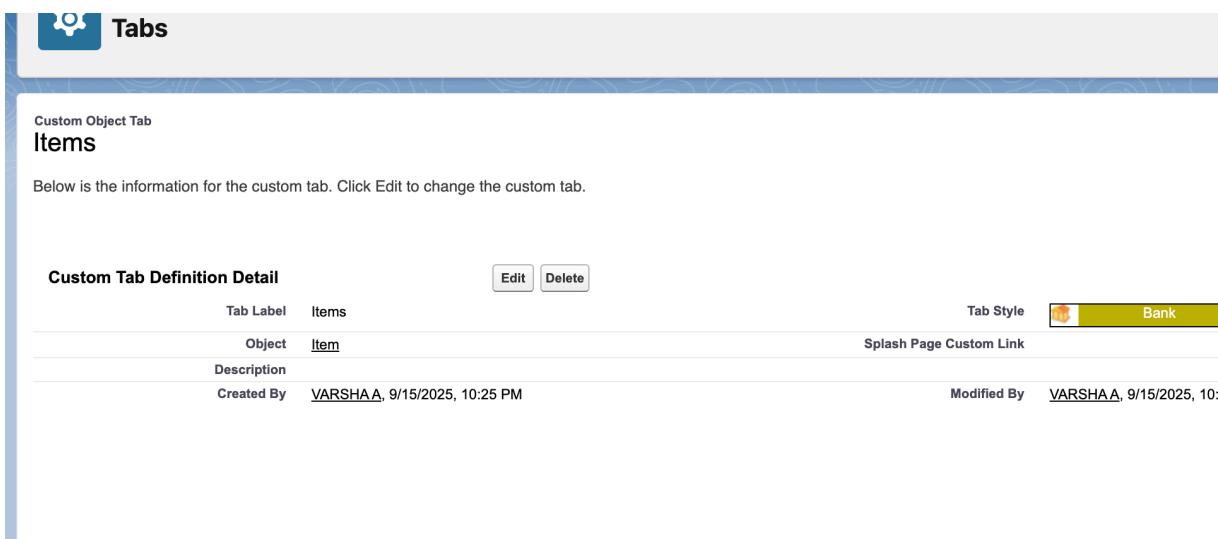
To create a Tab:(Customer)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. 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.



## 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.



## To create a Tab:( Customer Order)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Customer Order) >> Select the 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. In the top navigation bar, there are links for Home, Object Manager, and a search bar labeled "Search Setup". Below the navigation is a sidebar with a "User Interface" section containing "Rename Tabs and Labels" and "Tabs". A message at the bottom of the sidebar says, "Didn't find what you're looking for? Try using Global Search." The main content area is titled "SETUP Tabs" and shows a "Customer Orders" tab. The "Custom Tab Definition Detail" table includes columns for Tab Label (Customer Orders), Object (Customer Order), Description, Created By (VARSHAA, 9/15/2025, 10:28 PM), Tab Style (Books), and Modified By (VARSHAA, 9/15/2025, 10:28 PM). There are "Edit" and "Delete" buttons at the top of the table.

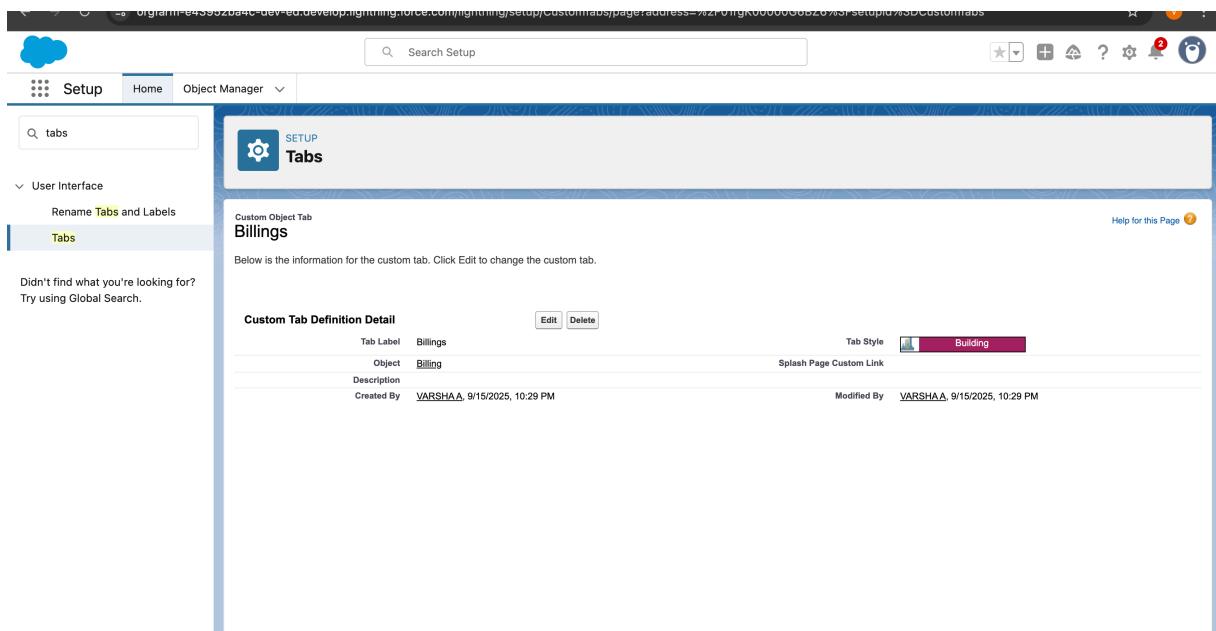
## To create a Tab:( Price)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Price) >> Select the 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. The main content area is titled "SETUP Tabs" and shows a "Price" tab. The "Custom Tab Definition Detail" table includes columns for Tab Label (Price), Object (Price), Description, Created By (VARSHAA, 9/15/2025, 10:29 PM), Tab Style (Can), and Modified By (VARSHAA, 9/15/2025, 10:29 PM). There are "Edit" and "Delete" buttons at the top of the table.

## To create a Tab:( Billing)

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



## 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.
3. Fill the app name in app details and branding as follow  
App Name : Jewellery Inventory System.  
Developer Name : This will auto populated  
Description : Elevate your look with elegance  
Image : optional (if you want to give any image you can otherwise not mandatory)  
Primary colour hex value : keep this default.
4. Then click Next >> (App option page) Set Navigation Style as Console Navigation >> Next.

5. (Utility Items) keep it as default >> Next.
6. To Add Navigation Items
7. 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.
8. To Add User Profiles:
9. Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

**App Details & Branding**

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

**App Details**

- \* App Name: Jewellery Inventory System
- \* Developer Name: Jewellery.Inventory.System
- Description: Elevate your look with elegance

**App Branding**

- Image: A small thumbnail image of a jewelry box.
- Primary Color Hex Value: #0070D2

**Org Theme Options**

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

**App Launcher Preview**

Jewellery Inventory System  
Elevate your look with elegance

**Navigation Items**

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

**Available Items**

- Accounts
- Activation Targets
- Activations
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories

**Selected Items**

- Jewel Customers
- Items
- Customer Orders
- Prices
- Billing
- Reports
- Dashboards

## Creating Lookup Relationship

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

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

## Creating a Master-Detail Relationship

### To Create a Master-Detail relationship :

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

## 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.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Text”.
4. Click on Next
5. Fill the above as following:
  - Field Label: City
  - Length : 20
  - Field Name : gets auto generated
  - Click on Next >> Next >> Save and new.

The screenshot shows the Salesforce Object Manager interface. On the left, there's a sidebar with various options like Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, and Validation Rules. The main area is titled 'Jewel Customer Custom Field' and shows a field named 'City'. It has a 'Field Label' of 'City', a 'Field Name' of 'City', and an 'API Name' of 'City\_\_c'. The 'Object Name' is 'Jewel Customer' and the 'Data Type' is 'Text'. There are tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. Below the field information, there are sections for 'General Options' (Required, Unique, Case Sensitive, External ID, Default Value) and 'Text Options' (Length set to 20). At the bottom, there's a 'Validation Rules' section with a 'New' button and a 'Validation Rules Help' link.

## Creating the Phone field in object Jewel Customer

To create fields in an object:

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

SETUP > OBJECT MANAGER  
Jewel Customer

The screenshot shows the 'Object Manager' interface for the 'Jewel Customer' object. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The 'Fields & Relationships' section is selected. In the main area, a new custom field 'Phone' is being defined. The 'Field Information' section shows the field label 'Phone', field name 'Phone', API name 'Phone\_\_c', and data type 'Phone'. The 'General Options' section includes a 'Required' checkbox which is unchecked. The 'Validation Rules' section indicates 'No validation rules defined.' A note at the bottom right says 'Always show me ▾ more records per related list'.

## 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.

SETUP > OBJECT MANAGER  
Jewel Customer

The screenshot shows the 'Object Manager' interface for the 'Jewel Customer' object. The sidebar and field definition details are identical to the previous screenshot, but the field label is now 'Email' and the field name is 'Email'. The 'General Options' section includes checkboxes for 'Required' (unchecked), 'Unique' (unchecked), 'External ID' (unchecked), and 'Default Value'.

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

The screenshot shows the Salesforce Setup interface under 'SETUP > OBJECT MANAGER'. A sidebar on the left lists various object settings like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Item Custom Field Purity' for the 'Item' object. It shows the 'Custom Field Definition Detail' with the following details:

- Field Information:** Field Label: Purity, Field Name: Purity, API Name: Purity\_\_c, Description: (empty), Help Text: (empty), Data Owner: (empty), Field Usage: (empty), Data Sensitivity Level: (empty), Compliance Categorization: (empty).
- General Options:** Required:  (unchecked), Unique:  (unchecked), External ID:  (unchecked), AI Prediction:  (unchecked), Default Value: (empty).
- Number Options:** Length: 2, Decimal Places: 0.

Timestamps indicate the record was created by VARSHAA on 9/15/2025 at 10:41 PM and modified by VARSHAA on 9/15/2025 at 10:41 PM.

## Picklist Field in Item Object To create fields in an object:

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

## Creating Currency Field in Price Object

To create fields in an object:

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.

SETUP > OBJECT MANAGER  
Item

Details  Fields & Relationships  Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules Object Access Triggers	<b>Item Custom Field</b> <b>Item Type</b> <a href="#">Back to Item</a>		Help for this Page	
	<a href="#">Validation Rules (0)</a>			
	<b>Custom Field Definition Detail</b>			
	<a href="#">Edit</a> <a href="#">Set Field-Level Security</a> <a href="#">View Field Accessibility</a> <a href="#">Where is this used?</a>			
	<b>Field Information</b>			
	Field Label <b>Item Type</b> Field Name <b>Item_Type</b> API Name <b>Item_Type_c</b> Description Help Text Data Owner Field Usage Data Sensitivity Level Compliance Categorization		Object Name <b>Item</b> Data Type <b>Picklist</b> Created By <b>VARSHAA</b> , 9/15/2025, 10:42 PM Modified By <b>VARSHAA</b> , 9/15/2025, 10:42 PM	
	<b>General Options</b>			
	Required <input type="checkbox"/> Default Value <b>[New]</b>			
	<b>Picklist Options</b>			
	Restrict picklist to the values defined in the value set <input checked="" type="checkbox"/> Controlling Field <b>[New]</b>			
	<b>Picklist Values Used</b> Active and Inactive picklist values <b>2 (1,000 max)</b>			

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

## 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.

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 Object Access Triggers	<b>Item Custom Field</b> <b>Gold Price</b> <a href="#">Back to Item</a>		Help for this Page	
	<a href="#">Validation Rules (0)</a>			
	<b>Custom Field Definition Detail</b>			
	<a href="#">Edit</a> <a href="#">Set Field-Level Security</a> <a href="#">View Field Accessibility</a> <a href="#">Where is this used?</a>			
	<b>Field Information</b>			
	Field Label <b>Gold Price</b> Field Name <b>Gold_Price</b> API Name <b>Gold_Price_c</b> Description Help Text Data Owner Field Usage Data Sensitivity Level Compliance Categorization		Object Name <b>Item</b> Data Type <b>Currency</b> Created By <b>VARSHAA</b> , 9/15/2025, 11:15 PM Modified By <b>VARSHAA</b> , 9/15/2025, 11:15 PM	
	<b>General Options</b>			
	Required <input type="checkbox"/> Default Value			
	<b>Currency Options</b>			
	Length <b>8</b> Decimal Places <b>0</b>			
	<b>Validation Rules</b>			
	No validation rules defined. <a href="#">New</a> <a href="#">Validation Rules Help ?</a>			

5. Under Advanced Formula write down the formula

- :Prices\_\_r.Gold\_price\_\_c / 10.  
 6. click "Check Syntax" and Next >> Next >> Save & New.

### **Creating Remaining Fields in Objects**

Now create the remaining fields using the data types mentioned.

s.no	Object name	Fields	
1	Jewel Customer	Field Name	Data type

State                      Text(20)

Street                    Text(20)

Country                  Text(18)

Zip/Postal code        Text(6)

2	Price	Silver Price	Currency (Length=8,Decimal=5)
---	-------	--------------	----------------------------------

3	Item	Field Label:Customer Name	Lookup Relationship with Jewel Customer Object
---	------	---------------------------	--

	Ornament	Text(20)
	Weight	Number (Length=8,Decimal=5)

Stone Weight

Number  
(Length=5,Decimal=5)

Percentage

Number  
(Length=2,Decimal=0)

Stone/Other

Currency  
(Length=8,Decimal=2)

Price

Picklist

Expected Days Of Return

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

Priority

Picklist

Silver Price

Formula  
(Return Type: Number)

		(Decimal=3)	
			Low Medium High Critical
			(Prices_r.Silver_price_c / 1000)
	Purity Gold Price	Formula (Return Type:Currency) (Decimal=2)	$((Prices_r.Gold_price_c * Purity_c) / 24) / 10$
	Total Weight	Formula (Return Type:Number) (Decimal=3)	$(Weight_c - Stone_weight_c)$
	Amount	Formula (Return Type:Currency) (Decimal=3)	$IF(ISPIKVAL( Item_Type_c , "Gold" , 1 ) , Total_weight_c * Purity_Gold_pc , Total_weight_c * Silver_price_r)$

	KDM	Formula (Return Type:Currency) (Decimal=0)	
		$(\text{Amount\_c} * \text{Perc entage\_c}) / 100$	
Making Charges	Formula		

4	Customer Order	Order Status	Picklist
			Started Not Started On Hold Completed Not Completed

		(Return Type:Currency) (Decimal=0)
		<div style="border: 1px solid black; padding: 10px;">           IF(ISPICKVAL(              Item_Type_c              ,"Gold"), Weight_c              * 300              , Weight_c * 10 )         </div>

5	Billin g	<table border="1"> <tr> <td>Field Label:Item</td><td>Lookup Relationship with Item Object</td></tr> <tr> <td>Ornament</td><td>           Formula            (Return Type:Text)             Item__r.Ornament__c         </td></tr> </table>	Field Label:Item	Lookup Relationship with Item Object	Ornament	Formula (Return Type:Text)  Item__r.Ornament__c
Field Label:Item	Lookup Relationship with Item Object					
Ornament	Formula (Return Type:Text)  Item__r.Ornament__c					

	KDM Charge	<p>Formula (Return Type:Currency)</p> <p>Formula (Return Type:Number) (Decimal=2)</p>
Weight		<div style="border: 1px solid black; padding: 5px;">Item__r.Stone_weight_c</div>
		<p>Formula Return Type: Number (Decimal=2)</p>
		<div style="border: 1px solid black; padding: 5px;">Item__r.Total_weight_c</div>
Amount		<p>Formula (Return Type:Currency) (Decimal=2)</p> <div style="border: 1px solid black; padding: 5px;">Item__r.Amount_c</div>

**Gold/Silver Price**

Formula  
(Return Type:Currency)  
(Decimal=2)

```
IF(ISPICKVAL( Item__r.Item_Type__c , "Gold"), Item__r.Gold_price__c ,  
Item__r.Silver_price__c )
```

	(Decimal=0)  Item__r.KDM__c	
Making Charges	Formula (Return Type:Currency) (Decimal=2)  Item__r.Making_Charges__c	
Stones/other price	Formula (Return Type:Currency) (Decimal=2)  Item__r.Stone_other_price__c	
Total Amount	Formula (Return Type:Currency) (Decimal=0)  Amount__c + KDM_Charge__c + Stones_other_price__c + Making_Charges__c	



Setup | Home | Object Manager

SETUP > OBJECT MANAGER  
Jewel Customer

**Fields & Relationships**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Country	Country__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Customer name	Name	Text(80)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Phone	Phone__c	Phone		
State	State__c	Text(20)		
Street	Street__c	Text(20)		
Zip/Postal code	Zip_Postal_code__c	Text(6)		

Setup | Home | Object Manager

SETUP > OBJECT MANAGER  
Item

**Fields & Relationships**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula(Currency)		
Created By	CreatedBy	Lookup(User)		
Customer Name	CustomerName__c	Lookup(Jewel Customer)		
Delayed Days Of Return	Expected_Days_of_Return__c	Positive	Priority	
Gold Price	Gold_Price__c	Formula(Currency)		
Item ID	Name	Auto Number		
Item Type	Item_Type__c	Positive		
KDM	KDM__c	Formula(Currency)		
Last Modified By	LastModifiedById	Lookup(User)		
Making Charges	Making_Charge__c	Formula(Currency)		
Owner	Owner	Lookup(User,Group)		
Percentage	Percentage__c	Number[0, 1]		
Price	Price__c	Lookup(Price)		
Priority	Priority__c	Positive		
Purity	Purity__c	Number[0, 1]		
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[0, 1]		
Stone/Other Price	Stone_Other_Price__c	Currency[0, 1]		
Total Weight	Total_Weight__c	Formula(Number)		
Weight	Weight__c	Number[0, 1]		

The screenshot shows the Salesforce Setup interface for the 'Customer Order' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Customer Order'. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The 'Fields & Relationships' section is selected and displays a table of fields:

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

The screenshot shows the Salesforce Setup interface for the 'Price' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Price'. The left sidebar shows standard setup options. The 'Fields & Relationships' section is selected and displays a table of fields:

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

Fields & Relationships					
	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INFLUX	
Amount	Amount_L	Formula (Currency)			
Billing Id	Name	Auto Number			
Created by	CreatedById	Lookup(User)			
Email	Email_L	Email			
GoldSilver Price	Gold_Silver_Price__r	Formula (Currency)			
Item	Item_L	Lookup(Item)			
KDM Charge	KDM_Charge_L	Formula (Currency)			
Last Modified By	LastModifiedById	Lookup(User)			
Making Charges	Making_Charges_L	Formula (Currency)			
Ornament	Ornament_L	Formula (Text)			
Owner	Owner	Lookup(Users)			
Paid Amount	Paid_Amount_L	Currency(14, 2)			
Paying Amount	Paying_Amount_L	Currency(14, 2)			
Stone weight	Stone_weight_L	Formula (Number)			
StoneOther price	Stone_other_price_L	Formula (Currency)			
Total Amount	Total_Amount_L	Formula (Currency)			
Weight	Weight_L	Formula (Number)			

## Gold Smith Profile

To create a new profile:

1. Go to setup >> type profiles in quick find box >>click on profiles ? clone the desired profile (System Administrator) >> enter profile name (Gold Smith) >> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Jewel Customer,Item,Customer Order,Prices,Billings .
4. Scroll down and Click on Save.

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

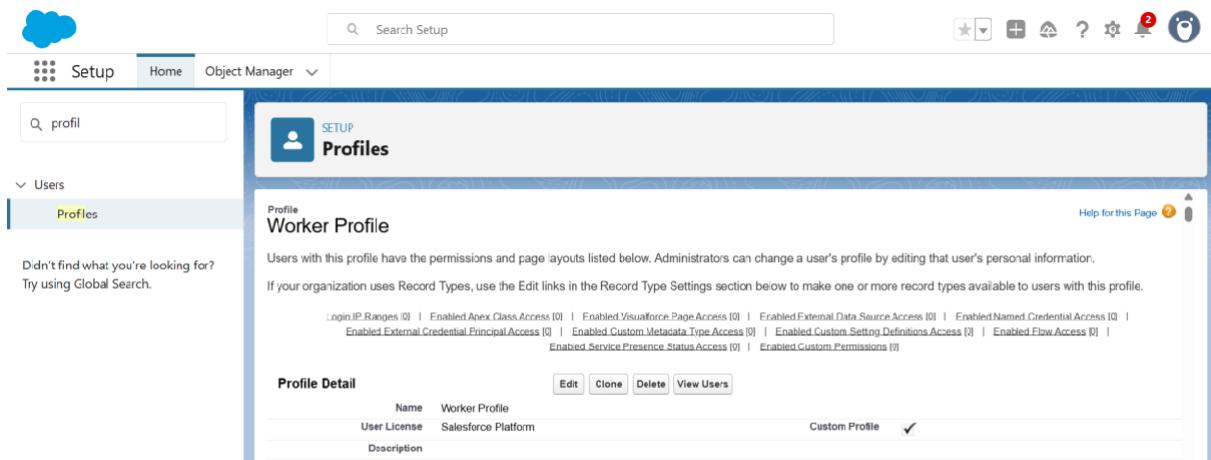
- Page Header:** orgfarm-e43952ba4c-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egK0000054WWH
- Left Navigation:** Setup, Home, Object Manager, profile
- Search Bar:** profile
- Section:** Profiles
- Profile Name:** Gold Smith
- Description:** Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.
- Permissions (Enabled):**
  - Login IP Ranges [0]
  - Enabled Apex Class Access [0]
  - Enabled Visualforce Page Access [0]
  - Enabled External Data Source Access [0]
  - Enabled Named Credential Access [0]
  - Enabled External Credential Principal Access [0]
  - Enabled Custom Metadata Type Access [0]
  - Enabled Custom Setting Definitions Access [0]
  - Enabled Flow Access [0]
  - Enabled Service Presence Status Access [0]
  - Enabled Custom Permissions [0]
- Profile Detail:**

Name	Gold Smith	Custom Profile	✓
User License	Salesforce		
Description			
Created By	VARSHA_A, 9/15/2025, 11:40 PM	Modified By	VARSHA_A, 9/15/2025, 11:40 PM
- Page Layouts:**

Standard Object Layouts	Global	Location Group Assignment	Location Group Assignment Layout
Email Application	Global Layout [View Assignment]	Macro	Macro Layout [View Assignment]
Home Page Layout	Not Assigned [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Account	Home Page Default [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Alternative Payment Method	Account Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Appointment Invitation	Alternative Payment Method Layout [View Assignment]	Opportunity Product	Opportunity Product Layout
	Appointment Invitation Layout		

## 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 (Worker) >> 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.



## Creating Gold Smith Role

1. From setup ,Go to quick find >> Search for Roles >> click on set up roles.
2. Click on Expand All and click on add role under whom this role works.
3. Give Label as “Gold Smith” and Role name gets auto populated. Check to whom this role (Gold Smith) reports. Then click on Save.

## Creating Worker Role

1. From setup ,Go to quick find >> Search for Roles >> click on set up roles.
2. Click on Expand All and click on add role under whom this role works.
3. Give Label as “Worker” and Role name gets auto populated. Check to whom this role (Gold Smith) reports. Then click on Save.

The screenshot shows the Salesforce Setup interface for managing roles. The left sidebar has a search bar and navigation links for Setup, Home, and Object Manager. Under 'Users', 'Roles' is selected. The main content area is titled 'Roles' and shows the 'Creating the Role Hierarchy' section. It displays a tree view of roles under 'Your Organization's Role Hierarchy'. The tree includes nodes like 'KPR College of Arts Science and Research' which contains 'CEO', 'CFO', 'COO', 'Gold.Smith', and 'SVP.Customer Service & Support'. Other nodes include 'Customer Support, International' and 'Customer Support, North America'. Each node has 'Edit | Del | Assign' options. A 'Help for this Page' link is at the top right, and a 'Show in tree view' dropdown is on the right.

## Create User

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

## 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.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit	Chatter Expert	Chatter	chatty.00dgj00000aqp6duav.4hz1umrsyda@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>   Edit	EPC_OrgFarm	QEPIC	epic.ts7a464c0923@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>   Edit	Mikeelscn_Kel	kmika	ab01@salesforce.org	Worker	<input checked="" type="checkbox"/>	Worker Profile
<input type="checkbox"/>   Edit	Mikeelscn_Niklaus	nmika	abi@salesforce.org	Gold Smith	<input checked="" type="checkbox"/>	Gold Smith
<input type="checkbox"/>   Edit	S.M_Abinandhan	23b	23bda00135@agenforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>   Edit	User_Integration	integ	integration@0000000000aqp6duav.com		<input checked="" type="checkbox"/>	Analytics.Cloud Integration User
<input type="checkbox"/>   Edit	User_Security	sec	insightssecurity@00dgj00000aqp6duav.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

## 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.

SETUP > OBJECT MANAGER  
Item

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

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

**Fields**

Section	Customer Name	Item Type	Ornament	Priority	Silver Price	Weight
Blank Space	KOM	Owner	Purity	Stone/Other Price		
Amount	Gold Price	Last Modified By	Percentage	Purity Gold Price	Stone Weight	
Created By	Item Id	Making Charges	Prices	Record Type	Total Weight	

Information (Header visible on edit only)

Customer Name	Sample Text
Prices	Sample Text
Item Type	Sample Text
Ornament	Sample Text
Gold Price	\$123.45
Purity Gold Price	\$123.45
Weight	0.30914
Purity	51
Percentage	86
Stone Weight	0.25696
Total Weight	10.467
Stone/Other Price	\$123.45
Amount	\$123.45
KDM	\$123.45
Making Charges	\$123.45

Priority Sample Text  
Expected Days Of Return Sample Text

## 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.

SETUP > OBJECT MANAGER  
Item

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

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

**Fields**

Section	Customer Name	Item Type	Ornament	Priority	Silver Price	Weight
Blank Space	KUM	Owner	Purity	Stone/Other Price		
Amount	Gold Price	Last Modified By	Percentage	Purity Gold Price	Stone Weight	
Created By	Item Id	Making Charges	Prices	Record Type	Total Weight	

Information (Header visible on edit only)

Customer Name	Sample Text
Prices	Sample Text
Item Type	Sample Text
Ornament	Sample Text
Silver Price	\$4.549
Weight	0.18752
Stone Weight	0.05436
Stone/Other Price	\$123.45
Total Weight	21.169
Percentage	54
Amount	\$123.45
KDM	\$123.45
Making Charges	\$123.45

Priority Sample Text  
Expected Days Of Return Sample Text

System Information (Header visible on edit only)

Created By	Sample Text
LastModified By	Sample Text

## To create a Record Type

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
2. Click on the Record Types >> click New.
3. Select Existing Record as “Master”,Record type Label as “Gold”,Description as “Gold items information”.
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 ? save & new.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. Under 'Item', a new record type 'Gold' is being created. The details show:

Record Type Label	Gold
Record Type Name	Gold
Namespace Prefix	
Description	Gold items information

The 'Active' checkbox is checked. The 'Edit' button is visible at the top right of the form.

## To create a Record Type

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
2. Click on the Record Types >> click New.
3. Select Existing Record as “Master”,Record type Label as “Silver”,Description as “Silver 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 Silver“for Gold Smith,Worker and System Administrator ? save & new.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. Under 'Item', a new record type 'Silver' is being created. The details show:

Record Type Label	Silver
Record Type Name	Silver
Namespace Prefix	
Description	Silver items information

The 'Active' checkbox is checked. The 'Edit' button is visible at the top right of the form.

## Creating permission set

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.
  4. Click on Items object ? click on Edit ? under Item:Record Type Assignments,enable Gold,Silver ? Object permission check for read ,edit and create.
  5. Click on Save.
  6. After saving the permission click on the Manage assignment
  7. Now click on the Add Assignment.
  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

Find Settings | Clone | Edit Properties | Manage Assignments | View Summary

Permission Set Overview > Object Settings | Items

Items

Tab Settings

Available Visible

Record Types Assigned Record Types

Gold Silver

Object Permissions

Permission Name Enabled

Read Create Edit Delete View All Records

... > SETUP > PERMISSION SET 'PER TO WORKER'

Per to Worker

Current Assignments

Full Name ↑	Active	Role	Profile	User License	Expires On
Ko Mikaelson	✓	Worker	Worker Profile	Salesforce Platform	

Add Assignment

## Create a Trigger Handler class

### CODE:

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

## Create the trigger

### CODE:

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

## 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.

Customer name	Status	Actions
sample9		
sample8		
sample7		
sample6		
sample5		
Abhinandhan		
Sample2		
sample4		
Sample3		

## 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.

Delete Jewel Customer

Are you sure you want to delete this Jewel Customer?

Cancel Delete

Customer name	Status	Actions
sample9		
sample8		
sample7		
sample6		
sample5		
Abhinandhan		
Sample2		
sample4		
Sample3		

## 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
5. Add fields from the left pane as shown.
6. Save or run it.
7. Create a report with report type: “Item with Billings”.
8. Create a report with report type: “Billings with item and Customer order”.

The screenshot shows the 'Reports' section of a software application. On the left, there's a sidebar with categories: 'RECENT', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', and 'FAVORITES', 'All Favorites'. The main area displays a table with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. There are three items listed:

Report Name	Description	Folder	Created By	Created On	Subscribed
Billings with item and Customer order		Private Reports	Abinandhan S M	9/10/2025, 8:17 AM	<input checked="" type="checkbox"/>
Item with Billings Report		Private Reports	Abinandhan S M	9/10/2025, 8:14 AM	<input checked="" type="checkbox"/>
Prices Report		Private Reports	Abinandhan S M	9/10/2025, 7:25 AM	<input checked="" type="checkbox"/>

## Create Dashboard

1. Go to the app >> click on the Dashboards tabs.
2. Give a Name and click on Create.
3. Select add component.
4. Select a Report and click on select.
5. Click Add then click on Save and then click on Done.

The screenshot shows the 'Dashboards' section of the application. At the top, there's a header with a search bar and various icons. Below it, a navigation bar shows 'Jewellery Inventory ...' and 'Dashboards'. A sub-header 'Dashboard1' is shown with a close button. The main area contains three cards representing different reports:

- Prices Report**: A table with columns 'Price ID', 'Gold Price', and 'Silver Price'. Data rows include:

Price ID	Gold Price	Silver Price
a03gL00000BsAy	\$80k	\$8.0000k
a03gL00000BsG9r	\$20k	\$2.0000k
a03gL00000BsGEM	\$70k	\$7.0000k
a03gL00000BsHHC	\$30k	\$3.0000k
a03gL00000BsIgh	\$60k	\$6.0000k
a03gL00000BsL4L	\$10k	\$1.0000k
a03gL00000BsL7a	\$50k	\$5.0000k
- Item with Billings Report**: A table with columns 'Billing Id' and 'Item: Item Id'. Data rows include:

Billing Id	Item: Item Id
Billing-01	Item-02
- Billings with item and Customer order**: A table with columns 'Billing Id', 'Oraiment', and 'Item: Item Id'. Data rows include:

Billing Id	Oraiment	Item: Item Id
Billing-01	bracelet	Item-02

At the bottom of each card, there are buttons for 'View Report', 'Edit', and 'Subscribe'.

## 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.
6. Now change the mode form Auto-layout to free-form.
7. Now select the manger option in the toolbox, click New resource.
8. Select the resource type as text template.
9. Change the view as Rich Text ? View to Plain Text.
10. 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}

11. Click done.

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

13. Their action bar will be opened in that search for “ send email ” and click on it.

14. Give the label name as “ notice”

15. API name will be auto populated.

16. Enable the body in set input values for the selected action.
  17. Select the text template that was created.
  18. Include Recipient Address list, select the email form the record. ({! \$Record.Item\_r.Customer\_Namer.Email\_c})
  19. Include the subject as "Welcome to Jewelry Inventory System".
  20. Click done.
  21. Now drag the path from the start to the action element.
  22. Click on save. Given the Flow label , Flow Api name will be auto populated.
23. And click save, and click on activate.

The screenshot shows the Flow Builder interface with a flow titled "Billing Alert Flow - VI". The flow starts with a "Record-Triggered Flow" Start element, which triggers on "A record is created or updated" for the object "Billing". The flow then branches to an "Action" element labeled "notice". After the action, the flow ends. On the right side, there is a "Configure Start" panel with tabs for "Object", "Trigger", "Entry Conditions", and "Optimize Flow". The "Object" tab shows "Billing" selected. The "Trigger" tab shows "A record is created or updated" selected. The "Entry Conditions" tab is collapsed. The "Optimize Flow" tab shows options for "Fast Field Updates" and "Actions and Related Records".

This screenshot shows the same flow as above, but with an additional "Send Email" action attached to the "notice" action. The "Send Email" action has a label "notice" and an API name "notice". The "Recipient Address List" field is set to "Billing\_\_c > Item > Customer Name". The "Configure Recipient Details" section shows fields for "Recipient Address Collection", "CC Recipient Address List", and "CC Recipient Address Collection".

Flow Builder    Billing Alert Flow - V1    Last saved on 9/11/2025, 03:19 PM (Active)    Run    Debug    View Logs    Save As New Version    Save    Deactivate

Toolbox

**Elements** Manage:

- Interaction (3)
  - Action
  - Subflow
  - Custom Error
- Trigger (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    Trigger: A record is created or updated    Optimize for: Actions and Related Records

+ Add Scheduled Paths (Optional)

Open Flow Trigger Explorer for Billing

Action notice

Run immediately.

Get more on the AppExchange

```
graph TD; Start((Start)) -- "Record-Triggered Flow" --> ActionNotice{Action notice}; ActionNotice -- "Run immediately." --> End((End))
```