

# **CRM Application for Jewel Management**

**College Name:** Shree Venkateshwara Arts & Science College

## **TEAM MEMBERS:**

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# Introduction :

This project is about developing a Jewellery Inventory CRM system using Salesforce. It helps to manage customers, items, orders, prices, and billing in an easy way. The system improves data management, automates billing processes, and reduces manual work. It also provides useful reports and dashboards for business analysis.

## Module 1: Salesforce Setup & Objects

### Step 1: Create Developer Account

1. Go to <https://developer.salesforce.com/signup>

The screenshot shows the 'Sign up for your Developer Edition' page. The page has a dark blue header with the Salesforce logo and the text 'Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.' Below this, there's a call-to-action button 'Sign up for your Developer Edition.' To the right, there's a form with fields for First name (Vasantha), Last name (K), Job title (Developer), Work email (vasanthk2023bca), Company (Svasc), and Country/Region (India). Each field has a green checkmark icon indicating it's been filled correctly.

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

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

Click on sign me up after filling these.

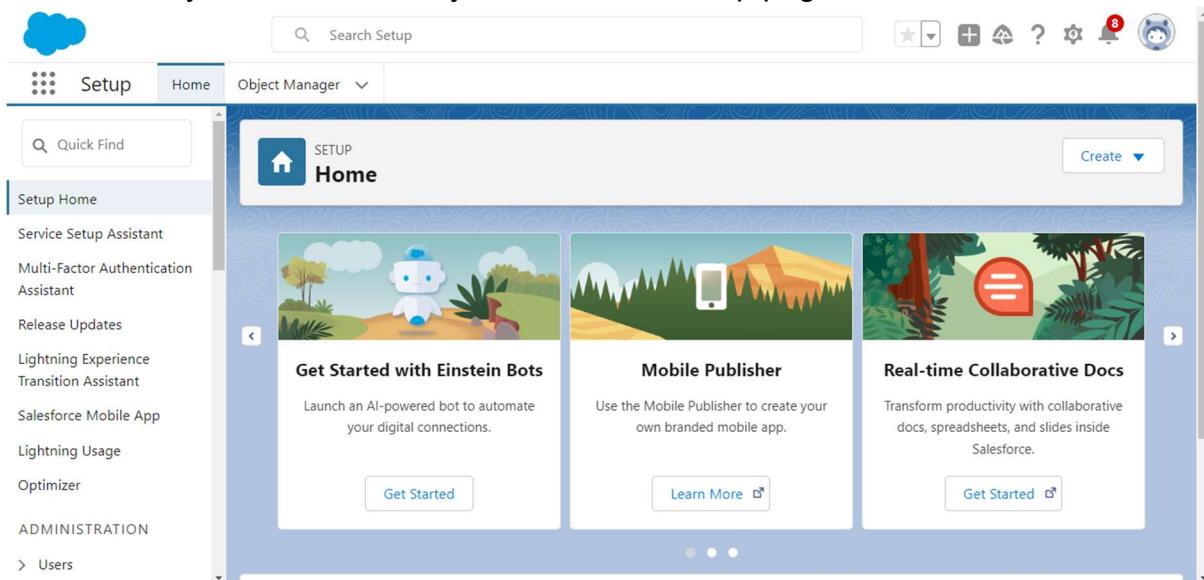
## Account Activation

### Step 2: Activate Account

1. Open your email → click **Reset Password**.
2. Set a new password & security question.
3. You'll be redirected to Salesforce Setup page.



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



## Create Jewel Customer Object

- Go to **Setup** → **Object Manager** → **Create** → **Custom Object**.
- **Create Jewel Customer Object**
  - Label: Jewel Customer
  - Record Name: Customer Name (Text)
  - Enable Reports & Search → Save.

Setup Home Object Manager ▾

Object Manager 51+ items, Sorted by Label

Quick Find Schema Builder Create ▾

Custom Object

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
				Custom Object from Spreadsheet

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

New Custom Object

Customer Record Name

Customer Plural Label

3. Enter Record Name Label and Format
  - Record Name >> Customer name
  - Data Type >> Text

Enter Record Name Label and Format

Record Name: Customer Example: Account Name

Data Type: Text

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status

In Development  Deployed

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

SETUP > OBJECT MANAGER  
Jewel Customer

Details	Details
Fields & Relationships	Description
Page Layouts	
Lightning Record Pages	API Name Jewel_Customer__c
Buttons, Links, and Actions	Custom
Compact Layouts	✓
Field Sets	Singular Label Jewel Customer
Object Limits	Plural Label Jewel Customers
Record Types	
Related Lookup Filters	Enable Reports
Search Layouts	✓
List View Button Layout	Track Activities
Restriction Rules	Track Field History
	Deployment Status Deployed
	Help Settings Standard salesforce.com Help Window

Jewl\_Customer Object Is Created .

## Create Item Object

- Label: Item
- Record Name: Item ID (Auto Number, format: Item-{00}, start: 1)

**Custom Object Information**

The singular and plural labels are used in tabs, page layouts, and reports.  
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label	Item	Example: Account
Plural Label	Items	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	Item	Example: Account
-------------	------	------------------

Description

- Enable Reports & Search → Save.

Create 3 more objects (same steps):

- **Customer Order** (Auto Number)
- **Price** (Auto Number)
- **Billing** (Auto Number)

LABEL	API NAME
Billing	Billing_c
Price	Price_c
Jewel Customer	Jewel_Customer_c
Item	Item_c
Order	Order_c

## Module 2: Tabs & Lightning App

### Step 1: Create Tabs

1. Go to Setup → Quick Find → Tabs → New (Custom Object Tab).

2. Create Tab for each object:
  - o Jewel Customer
  - o Item
  - o Customer Order
  - o Price
  - o Billing

Custom Object Tabs		<a href="#">New</a> <a href="#">What Is This?</a>
Action	Label	Tab Style
Edit   Del	<u>Billings</u>	 Computer
Edit   Del	<u>Items</u>	 Box
Edit   Del	<u>Jewel Customers</u>	 Jewel
Edit   Del	<u>Orders</u>	 Form
Edit   Del	<u>Prices</u>	 Sack

3. Select a tab style → keep default settings → Save.

## Step 2: Create Lightning App

1. Go to **Setup** → **Quick Find** → **App Manager** → **New Lightning App**.
2. Fill details:

**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 i  
Jewellery Inventory System

\* Developer Name i  
Jewellery\_Inventory\_System

Description i  
Enter a description...

**App Branding**

Image i

Primary Color Hex Value i  
 #0070D2

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

**App Launcher Preview**



- o App Name: **Jewellery Inventory System**
- o Description: *Elevate your look with elegance*
- o Keep default branding & color.

3. Set Navigation Style = **Console Navigation** → Next.
4. Keep Utility Items default → Next.



5. Add Navigation Items: **Jewel Customer, Item, Customer Order, Price, Billing, Reports, Dashboard** → Next.
6. Add User Profiles: Select **System Administrator** → Save & Finish.

## Module 3: Relationships & Fields

### Step 1: Create Lookup Relationship (Connect Jewel Customer ↔ Customer Order)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Jewel Customer)		✓

1. Go to **Setup** → **Object Manager** → **Customer Order**.
2. Click **Fields & Relationships** → **New**.
3. Select **Lookup Relationship** → Next.
4. Related Object = **Jewel Customer**.
5. Field Label = Customer → Next → Save.

### Step 2: Create Master-Detail Relationship (Connect Item ↔ Customer Order)

SETUP > OBJECT MANAGER Order					
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	Fields & Relationships 7 Items, Sorted by Field Label			<input type="button" value="Quick Find"/> <input type="button" value="New"/> <input type="button" value="Deleted Fields"/> <input type="button" value="Field Dependencies"/> <input type="button" value="Set History Tracking"/>	
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
	Created By	CreatedById	Lookup(User)		
	Customer	Customer__c	Lookup(Jewel Customer)	✓	▼
	Customer Name	Customer_Name__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		▼

1. Go to **Setup → Object Manager → Customer Order**.
2. Click **Fields & Relationships → New**.
3. Select **Master-Detail Relationship** → Next.
4. Related Object = **Item**.
5. Field Label = Item → Next → Save.

### Step 3: Create Fields in Jewel Customer Object

SETUP > OBJECT MANAGER Jewel Customer					
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	Fields & Relationships 11 Items, Sorted by Field Label			<input type="button" value="Quick Find"/> <input type="button" value="New"/> <input type="button" value="Deleted Fields"/> <input type="button" value="Field Dependencies"/> <input type="button" value="Set History Tracking"/>	
	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)		▼

1. City → Text(20)
2. Phone → Phone

### Step 4: Create Fields in Item Object

Priority	Priority__c	Picklist
Item Type	Item_Type__c	Picklist

1. Purity → Number(2)
2. Item Type → Picklist (Values: Gold, Silver)

### Step 5: Create Fields in Price Object

1. Gold Price → Currency(8,0)

## Step 6: Create Formula Field in Item Object

1. Lookup Relationship: Item ↔ Price (Field Name: Prices).
2. Create Formula Field: Gold Price → Formula Return Type = Currency.
3. Formula: Prices\_\_r.Gold\_price\_\_c / 10

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.  
Example: Gross Margin = Amount - Cost\_\_c | More Examples...

**Simple Formula**

Insert Field Insert Operator

Gold price (Currency) = Prices\_\_r.Gold\_price\_\_c / 10

Functions

- All Function Categories -
- ABS
- ACOS
- ADIMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function

Item New Custom Field Step 2 of 5

Field Label: Gold price Field Name: Gold\_price

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

Formula Return Type

None Selected

Select one of the data types below.

<input type="radio"/> Checkbox	Calculate a boolean value. Example: TODAY() > CloseDate
<input type="radio"/> Currency	Calculate a dollar or other currency amount and automatically format the field as a currency amount. Example: Gross Margin = Amount - Cost__c
<input type="radio"/> Date	Calculate a date, for example, by adding or subtracting days to other dates. Example: Reminder Date = CloseDate + 7
<input type="radio"/> Date/Time	Calculate a datetime, for example, by adding a number of hours or days to another datetime. Example: Next = NOW() + 1
<input type="radio"/> Number	Calculate a numeric value. Example: Fahrenheit = 1.8 * Celsius__c + 32 and automatically add the percent sign to the number.

click "Check Syntax" and Next >> Next >> Save & New.

## Module 4: Remaining Fields & Validation Rules

### Step 1: Add Remaining Fields

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Billing	Billing__c	Custom Object		9/4/2025	✓
Price	Price__c	Custom Object		9/4/2025	✓
Jewel Customer	Jewel_Customer__c	Custom Object		9/4/2025	✓
Item	Item__c	Custom Object		9/4/2025	✓
Order	Order__c	Custom Object		9/4/2025	✓

## ◆ Jewel Customer Object

- State → Text(20)
- Street → Text(20)
- Country → Text(18)
- Zip/Postal Code → Text(6)

SETUP > OBJECT MANAGER Jewel Customer					
Details	Fields & Relationships				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Owner	OwnerId	Lookup(User,Group)		✓
Lightning Record Pages	Customer name	Name	Text(80)		✓
Buttons, Links, and Actions	Last Modified By	LastModifiedById	Lookup(User)		
Compact Layouts	Created By	CreatedById	Lookup(User)		
Field Sets	Zip/Postal Code	Zip_Postal_Code__c	Text(6)		
Object Limits	Country	Country__c	Text(18)		
Record Types	Street	Street__c	Text(20)		
Related Lookup Filters	State	State__c	Text(20)		
Search Layouts	Phone	Phone__c	Phone		
List View Button Layout	City	City__c	Text(20)		
Restriction Rules	Email	Email__c	Email		

## ◆ Price Object

- Silver Price → Currency(8,5)

SETUP > OBJECT MANAGER Price					
Details	Fields & Relationships				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedBy	Lookup(User)		
Lightning Record Pages	Gold Price	Gold_Price__c	Currency(8, 0)		
Buttons, Links, and Actions	Last Modified By	LastModifiedById	Lookup(User)		
Compact Layouts	Owner	OwnerId	Lookup(User,Group)		✓
Field Sets	Price Id	Name	Auto Number		✓
Object Limits	Silver Price	Silver_Price__c	Currency(8,5)		

## ◆ Item Object

SETUP > OBJECT MANAGER Item					
Details	Fields & Relationships				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Amount	Amount__c	Formula (Currency)		
Lightning Record Pages	Created By	CreatedBy	Lookup(User)		
Buttons, Links, and Actions	Customer Name	Customer_Name__c	Lookup(Jewel Customer)		✓
Compact Layouts	Expected Days Of Return	Expected_Days_Of_Return__c	Picklist	Priority	
Field Sets	Gold Price	Gold_Price__c	Formula (Currency)		
Object Limits	Item Id	Name	Auto Number		✓
Record Types	Item Type	Item_Type__c	Picklist		
Related Lookup Filters	KDM	KDM__c	Formula (Currency)		
Search Layouts	Last Modified By	LastModifiedById	Lookup(User)		
List View Button Layout	Making Charges	Making_Charges__c	Formula (Currency)		
Restriction Rules	Ornament	Ornament__c	Text(20)		

- Customer Name → Lookup (Jewel Customer)
- Ornament → Text(20)
- Weight → Number(8,5)
- Stone Weight → Number(5,5)
- Percentage → Number(2,0)
- Stone/Other Price → Currency(8,2)
- Expected Days of Return → Picklist (1-3, 4-5, 6-7, 8-10 Days)
- Priority → Picklist (Low, Medium, High, Critical)
- Silver Price Formula → (Prices\_\_r.Silver\_price\_\_c / 1000)
- Purity Gold Price Formula → ((Prices\_\_r.Gold\_price\_\_c \* Purity\_\_c) / 24) / 10
- Total Weight Formula → (Weight\_\_c - Stone\_weight\_\_c)
- Amount Formula → IF(Gold, Total\_weight \* Purity\_Gold\_price, Total\_weight \* Silver\_price)
- KDM Formula → (Amount \* Percentage / 100)
- Making Charges Formula → IF(Gold, Weight \* 300, Weight \* 10)

SETUP > OBJECT MANAGER Item			
Fields & Relationships		23 items, Sorted by Field Label	
			Quick Find   New   Deleted Fields   Field Dependencies   Set History Tracking
Details	Making Charges	Making_Charges__c	Formula (Currency)
Fields & Relationships	Ornament	Ornament__c	Text(20)
Page Layouts	Owner	OwnerId	Lookup(User/Group)
Lightning Record Pages	Percentage	percentage__c	Number(2, 0)
Buttons, Links, and Actions	Price	Price__c	Lookup(Price)
Compact Layouts	Priority	Priority__c	Picklist
Field Sets	Purity	Purity__c	Number(2, 0)
Object Limits	Purity/Gold Price	Purity_Gold_Price__c	Formula (Currency)
Record Types	Record Type	RecordTypeId	Record Type
Related Lookup Filters	Silver Price	Silver_Price__c	Formula (Number)
Search Layouts	Stone Weight	Stone_Weight__c	Number(5, 5)
List View Button Layout	Stone/Other Price	Stone_Other_Price__c	Currency(8, 2)
Restriction Rules	Total Weight	Total_Weight__c	Formula (Number)
Scoping Rules	Weight	Weight__c	Number(8, 5)
Object Access			
Triggers			
Flow Triggers			
Validation Rules			
Conditional Field Formatting			

## ◆ Customer Order Object

- Order Status → Picklist (Started, Not Started, On Hold, Completed, Not Completed)

SETUP > OBJECT MANAGER Order				
Fields & Relationships		7 items, Sorted by Field Label		
		FIELD NAME	DATA TYPE	CONTROLLING FIELD
Details	Created By	CreatedById	Lookup(User)	
Fields & Relationships	Customer	Customer__c	Lookup(Jewel Customer)	
Page Layouts	Customer Name	Customer_Name__c	Lookup(Jewel Customer)	
Lightning Record Pages	Item	Item__c	Master-Detail(Item)	
Buttons, Links, and Actions	Last Modified By	LastModifiedById	Lookup(User)	
Compact Layouts	Order Id	Name	Auto Number	
Field Sets	Order Status	Order_Status__c	Picklist	
Object Limits				
Record Types				
Related Lookup Filters				
Search Layouts				

## ◆ Billing Object

- Lookup to Item
- Formulas (Ornament, Weight, Amount, Gold/Silver Price, KDM, Making Charges, Stone/Other Price, Total Amount)

FIELDS & RELATIONSHIPS					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Owner	OwnerId	Lookup(User Group)		✓
Lightning Record Pages	Billing Id	Name	Auto Number		✓
Buttons, Links, and Actions	Item	Item__c	Lookup(Item)		✓
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)		
Field Sets	Created By	CreateById	Lookup(User)		
Object Limits	Last Sent Email Body	Last_Sent_Email_Body__c	Long Text Area(2700)		
Record Types	Last Email Sent Date	Last_Email_Sent_Date__c	Date/Time		
Related Lookup Filters	Paid Amount	Paid_Amount__c	Currency(18, 0)		
Search Layouts	Paying Amount	Paying_Amount__c	Currency(18, 0)		
List View Button Layout	Total Amount	Total_Amount__c	Formula(Currency)		
Restriction Rules	KDM Change	KDM_Change__c	Formula(Currency)		
Scoping Rules	Gold/Silver Price	Gold_Silver_Price__c	Formula(Currency)		
Object Access	Making Charges	Making_Charges__c	Formula(Currency)		
Triggers	Amount	Amount__c	Formula(Currency)		
Flow Triggers	Weight	Weight__c	Formula(Number)		
Validation Rules	Stone Weight	Stone_Weight__c	Formula(Number)		
Conditional Field Formatting	Ornament	Ornament__c	Formula(Text)		
	Stones/Other Price	Stones_Other_Price__c	Formula(Currency)		

## Step 2: Field Dependencies

FIELDS & RELATIONSHIPS	
Page Layouts	Field Label: Expected Days Of Return
Lightning Record Pages	Field Name: Expected_Days_of_Return
Buttons, Links, and Actions	Description:
Compact Layouts	Help Text:
Field Sets	Data Owner: User
Object Limits	Field Usage: --None--
Record Types	Data Sensitivity Level: --None--
Related Lookup Filters	Compliance Categorization: Available Chosen
Search Layouts	

- Go to Setup → Object Manager → Item → Priority field → Field Dependencies → New.
- Controlling Field = Priority
- Dependent Field = Expected Days of Return
- Map values accordingly → Save.

## Step 3: Validation Rules

### ◆ Jewel Customer Object

- Postal Code must be 6 digits :

```
AND( OR( LEN(Zip_Postal_code_c) <> 6,
NOT(REGEX(Zip_Postal_code_c, "^[0-9]{6}$")) ),
NOT(ISBLANK(Zip_Postal_code_c)) )
```

- Mandatory Fields (City, Country, Phone, State, Street) :

```
OR(ISBLANK(City_c), ISBLANK(Country_c), ISBLANK(Phone_c),
ISBLANK(State_c), ISBLANK(Street_c))
```

SETUP > OBJECT MANAGER Jewel Customer					
	Validation Rules				
	RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Page Layouts	Postal_Code	Zip/Postal Code	Must contain 6 digits	✓	Vasanth K, 9/4/2025, 10:15 PM
Lightning Record Pages	ValidationRule_For_JewelCustomerObject	Top of Page	Please fill Required fields	✓	Vasanth K, 9/4/2025, 10:16 PM
Buttons, Links, and Actions					
Compact Layouts					
Field Sets					
Object Limits					

### Item Object

- Required Fields Validation :

```
OR(ISBLANK(Amount_c), ISBLANK(Customer_Name_c),
ISBLANK(Gold_price_c), ISBLANK(KDM_c), ISBLANK(Ornament_c),
ISBLANK(Percentage_c), ISBLANK(Making_Charges_c), ISBLANK(Prices_c),
ISBLANK(Stone_weight_c), ISBLANK(Silver_price_c),
ISBLANK(Stone_other_price_c), ISBLANK(Weight_c))
```

SETUP > OBJECT MANAGER Item					
	Validation Rules				
	RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Page Layouts	ValidationRule_For_Item	Top of Page	Please fill Required fields	✓	Vasanth K, 9/4/2025, 10:21 PM
Lightning Record Pages					
Buttons, Links, and Actions					

## Module 5: Profiles, Roles & Users

## **Step 1: Create Gold Smith Profile**

1. Go to **Setup** → **Quick Find** → **Profiles**.

Profiles				<a href="#">Help for this Page</a>
<a href="#">All Profiles</a> <span>▼</span>		<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Create New View</a>		
<a href="#">New Profile</a>		<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Clone</a>
Action	Profile Name	User License	Custom	
<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Clone</a>	B2B Reordering Portal Buyer Profile	External Apps Login	✓	
<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Clone</a>	Salesforce API Only System Integrations	Salesforce Integration	✓	
<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Clone</a>	Read Only	Salesforce	✓	
<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Clone</a>	Custom_Sales_Profile	Salesforce	✓	
<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Clone</a>	Custom_Marketing_Profile	Salesforce	✓	
<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Clone</a>	Custom_Support_Profile	Salesforce	✓	
<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Clone</a>	Gold Smith	Salesforce	✓	
<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Clone</a>	Worker	Salesforce Platform	✓	
<a href="#">Edit</a>   <a href="#">Clone</a>	System Administrator	Salesforce	□	
<a href="#">Edit</a>   <a href="#">Clone</a>	Analytics Cloud Integration User	Analytics Cloud Integration User	□	
<a href="#">Edit</a>   <a href="#">Clone</a>	Chatter Free User	Chatter Free	□	
<a href="#">Edit</a>   <a href="#">Clone</a>	Analytics Cloud Security User	Analytics Cloud Integration User	□	
<a href="#">Edit</a>   <a href="#">Clone</a>	External Apps Login User	External Apps Login	□	
<a href="#">Edit</a>   <a href="#">Clone</a>	Minimum Access - Salesforce	Salesforce	□	
<a href="#">Edit</a>   <a href="#">Clone</a>	Standard Platform User	Salesforce Platform	□	
<a href="#">Edit</a>   <a href="#">Clone</a>	Customer Community Login User	Customer Community Login	□	
<a href="#">Edit</a>   <a href="#">Clone</a>	Cross Org Data Proxy User	XOrg Proxy User	□	

2. Clone **System Administrator** → Name it **Gold Smith** → Save.
  3. Edit Profile → Scroll to **Custom Object Permissions** → Give access to:
    - Jewel Customer
    - Item
    - Customer Order
    - Price
    - Billing

**SETUP Profiles**

Data Share Sagemaker Connections	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Data Share Snowflake Connections	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Data Share Targets	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Data Share Target Connection	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Work Plan Templates	<input checked="" type="checkbox"/>						
Work Step Templates	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Work Types	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Work Type Groups	<input checked="" type="checkbox"/>						

**Custom Object Permissions**

	Basic Access				Data Administration			Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Billing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>										
Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>										
Jewel Customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>												
Orders	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>										
Prices	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>										

**Session Settings**

Session Times Out After	2 hours of inactivity	<input type="button" value="Help"/>
Session Security Level Required at Login	None	<input type="button" value="Help"/>

**Password Policies**

User passwords expire in	90 days	<input type="button" value="Help"/>
Enforce password history	3 passwords remembered	<input type="button" value="Help"/>
Minimum password length	8	
Password complexity requirement	Must include alpha and numeric characters	

- #### 4. Save.

## Step 2: Create Worker Profile

Profile Edit  
Worker

Set the permissions and page layouts for this profile.

Profile Edit		Save	Save & New	Cancel
Name	Worker			
User License	Salesforce Platform			
Description				
Custom Profile <input checked="" type="checkbox"/>				

1. Go to **Setup → Profiles**.
2. Clone **Salesforce Platform User** → Name it **Worker** → Save.

Basic Access				Data Administration				Basic Access				Data Administration			
Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields		Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>												
Billings				Items				Orders				Prices			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>												
Jewel Customers															

**Session Settings**

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

**Password Policies**

- User passwords expire in: 90 days
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 10
- Lockout effective period: 15 minutes
- Obfuscate secret answer for password resets:
- Require a minimum 1 day password lifetime:
- Don't immediately expire links in forgot password emails:

3. Edit Profile → Give access to:
  - o Item
  - o Price
  - o Customer Order
4. Save.

## Step 3: Create Roles

1. Go to **Setup → Roles → Set Up Roles → Expand All.**

The screenshot shows the 'Your Organization's Role Hierarchy' section. At the top, there is a button labeled 'Add Role'. Below it, the hierarchy is listed under the root node 'Svasc':

- Svasc**:
  - CEO**: Edit | Del | Assign
  - CFO**: Edit | Del | Assign
  - COO**: Edit | Del | Assign
  - Gold Smith**: Edit | Del | Assign
  - Worker**: Edit | Del | Assign
- SVP\_Customer Service & Support**: Edit | Del | Assign
- Customer Support, International**: Edit | Del | Assign
- Customer Support, North America**: Edit | Del | Assign
- Installation & Repair Services**: Edit | Del | Assign
- SVP\_Human Resources**: Edit | Del | Assign
- SVP\_Sales & Marketing**: Edit | Del | Assign
- VP\_International Sales**: Edit | Del | Assign
- VP\_Marketing**: Edit | Del | Assign
  - Marketing Team**: Edit | Del | Assign
- VP\_North American Sales**: Edit | Del | Assign

2. **Add Role:**
  - **Gold Smith** (Reports to higher role if needed).
  - **Worker** (Reto Gold Smith).
3. Save

## Step 4: Create Users

### ◆ Gold Smith User

- First Name: Niklaus
- Last Name: Mikaelson
- Alias, Email, Username: any valid format
- Role: Gold Smith
- User License: Salesforce
- Profile: Gold Smith

### ◆ Worker User

- First Name: Kol
- Last Name: Mikaelson
- Alias, Email, Username: any valid format
- Role: Worker
- User License: Salesforce Platform
- Profile: Worker

(Note: Create 2 more Worker users using same profile)

## Step 5: Create Page Layouts & Record Types

### ◆ Page Layouts

1. Go to **Setup → Object Manager → Item → Page Layouts → New.**
  - o Page Layout for Gold → Keep gold-related fields only.
  - o Page Layout for Silver → Keep silver-related fields only.

SETUP > OBJECT MANAGER Item			
Details	PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Fields & Relationships	Item Layout	Vasanth K, 9/4/2025, 6:56 PM	Vasanth K, 9/4/2025, 9:31 PM
Page Layouts	Page Layout for Gold	Vasanth K, 9/4/2025, 10:57 PM	Vasanth K, 9/4/2025, 10:58 PM
Lightning Record Pages	Page Layout for Silver	Vasanth K, 9/4/2025, 11:00 PM	Vasanth K, 9/4/2025, 11:01 PM
Buttons, Links, and Actions			
Compact Layouts			

### ◆ Record Types

1. Go to **Object Manager → Item → Record Types → New.**
  - o Record Type: **Gold** → Use “Page Layout for Gold”.
  - o Record Type: **Silver** → Use “Page Layout for Silver”.

SETUP > OBJECT MANAGER Item				
Details	RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Fields & Relationships	Gold	Gold items information	✓	Vasanth K, 9/4/2025, 11:06 PM
Page Layouts	Silver	Silver items information	✓	Vasanth K, 9/4/2025, 11:09 PM
Lightning Record Pages				
Buttons, Links, and Actions				
Compact Layouts				

## Step 6: Create Permission Set

1. Go to **Setup → Permission Sets → New.**
2. Label: **Per to Worker** → Save.
3. Under Object Settings → Items → Edit →
  - o Enable Record Types: Gold, Silver.
  - o Permissions: Read, Edit, Create.
4. Save.

SETUP Permission Sets	
Permission Set	Per to Worker
<input type="text"/> Find Settings...	<input type="button"/> Clone <input type="button"/> Edit Properties <input type="button"/> Manage Assignments <input type="button"/> View Summary
<b>Permission Set Overview</b>	
Description	API Name Per_to_Worker
License	Namespace Prefix
Session Activation Required <input type="checkbox"/>	Created By Vasanth K, 9/4/2025, 11:10 PM
Permission Set Groups Added To 0	Last Modified By Vasanth K, 9/4/2025, 11:13 PM

5. Assign this permission set to **Worker Users**.

## Module 6: Triggers, Flow, Reports & Dashboards

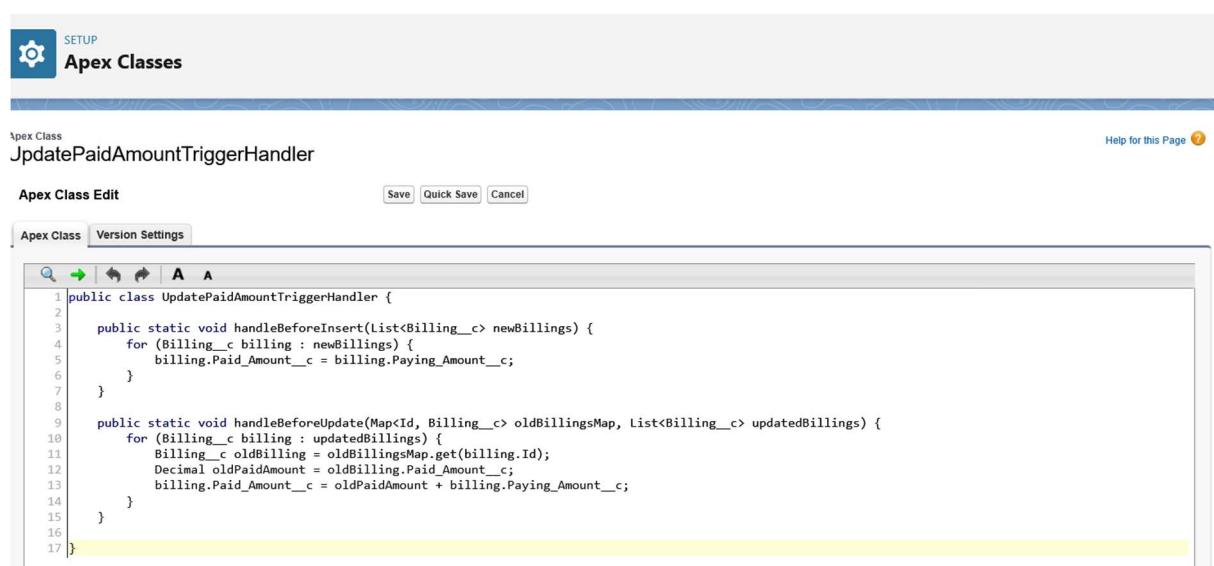
### Step 1: Create Trigger Handler Class

1. Go to **Developer Console** → **New Apex Class**.
2. Name: `UpdatePaidAmountTriggerHandler`.
3. Paste 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;
        }
    }
}
```



## Step 2: Create Trigger

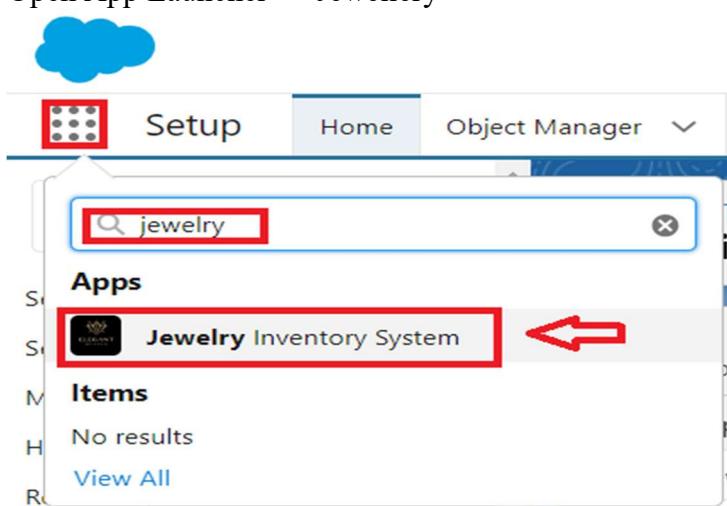
1. Go to Setup → Object Manager → Billing → Triggers → New.
2. Name: UpdatePaidAmountTrigger.
3. Paste the code and Save.

```
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);  
    }  
}
```

The screenshot shows the Salesforce Object Manager interface. On the left, there's a sidebar with links like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, and Compact Layouts. The main area is titled 'Triggers' under the 'Billing' object. It shows one item: 'UpdatePaidAmountTrigger'. The table has columns for LABEL, API VERSION, SIZE WITHOUT COMMENTS, and MODIFIED BY. The entry for 'UpdatePaidAmountTrigger' has a label of 'UpdatePaidAmountTrigger', an API version of '64.0', a size of '310', and was modified by 'Vasanth K' on '9/4/2025, 11:26 PM'. There are 'Quick Find' and 'New' buttons at the top right of the table.

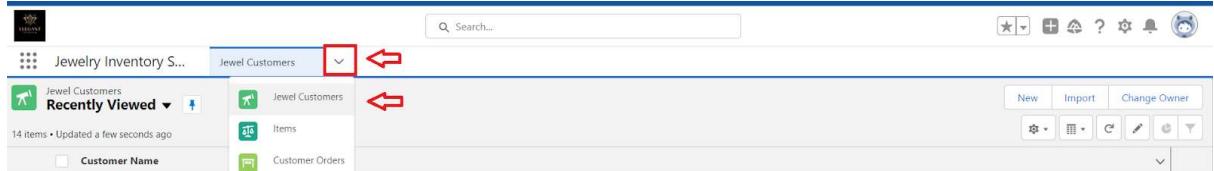
## Step 3: Create Records

1. Open App Launcher → Jewellery



2. Inventory System.

3. Create minimum 10 records for each object: Jewel Customer, Price, Item, Customer Order, Billing.
4. • Click on Drop Down and Click on the Jewel Customer tab.
5. • Click New.



6. • Fill the Details and click on Save.

## Step 4: Create Reports

1. Go to Reports tab → New Report.
2. Select Report Type → Start Report.
3. Add fields → Save/Run.
4. Example reports:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Items Report		Private Reports	Vasanth K	9/4/2025, 11:45 PM	<input checked="" type="checkbox"/>
Created by Me	New Jewel Customers Report		Private Reports	Vasanth K	9/4/2025, 11:42 PM	<input checked="" type="checkbox"/>
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						

- o Items with Billings
- o Billings with Item & Customer Order

## Step 5: Create Dashboard

1. Go to Dashboards tab → New Dashboard.
2. Enter name → Create.
3. Add Component → Select Report → Save & Done.
4. Create at least 2 dashboards.

The screenshot shows the 'Dashboards' section of the Salesforce setup. A single dashboard named 'GoldSmith Overview' is listed under the 'Recent' category. The dashboard details are: Description: Details, Folder: Private Dashboards, Created By: Vasanth K, Created On: 9/4/2025, 11:40 PM. There is also a 'Created by Me' section below.

## Step 6: Create Flow (Email Automation)

1. Setup → Flows → New Flow.

The screenshot shows the 'Flows' section of the Salesforce setup. The 'All Flows' list is displayed, showing various flows like 'Ac Amount update', 'Book Appointment from Invitation', etc. A red box highlights the 'New Flow' button in the top right corner of the list area, labeled '3'. To the left, the navigation sidebar shows 'flows' selected under 'Process Automation' (labeled '1') and 'Flows' (labeled '2').

2. Select Record-Triggered Flow.

The screenshot shows the 'New Flow' creation wizard. Under the 'Core' tab, the 'Record-Triggered Flow' option is selected and highlighted with a red box (labeled '1'). Below it, other flow types are listed: 'Screen Flow', 'Schedule-Triggered Flow', 'Autolaunched Flow (No Trigger)', and 'Record-Triggered Orchestration'. At the bottom right, a large red box surrounds the 'Create' button (labeled '2').

### 3. Object = Billing → Trigger = Created/Updated.

Configure Start

Select Object

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

\* Object  
Item

Configure Trigger

\* Trigger the Flow When:

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

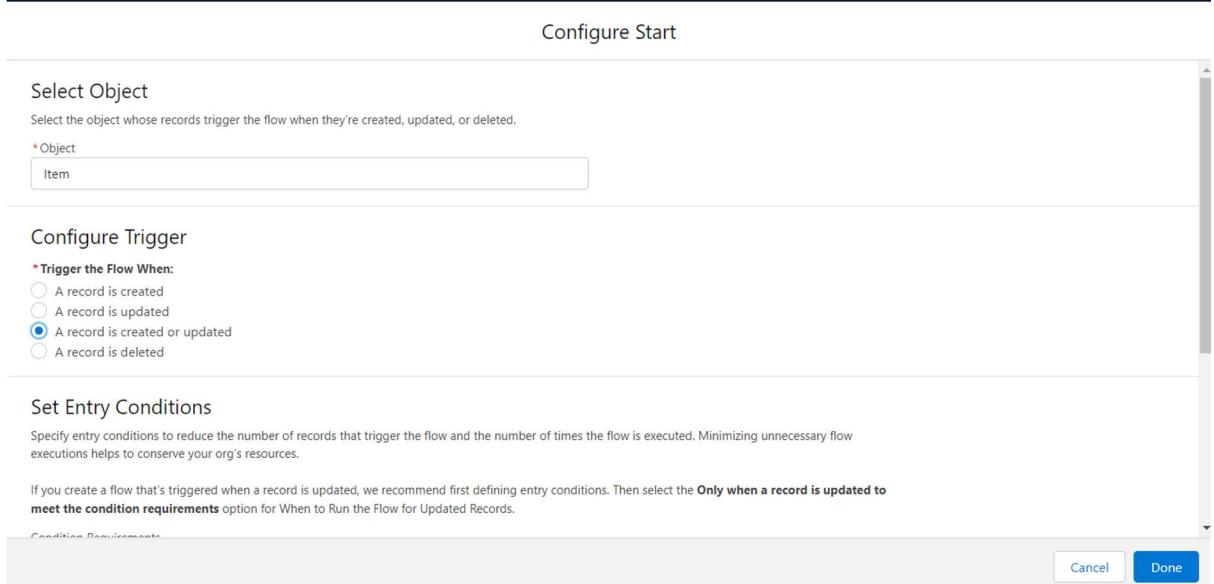
Set Entry Conditions

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

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

Condition Requirements

Cancel Done



### 4. Add Text Template → Email Body.

Flow Builder Email - V5

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

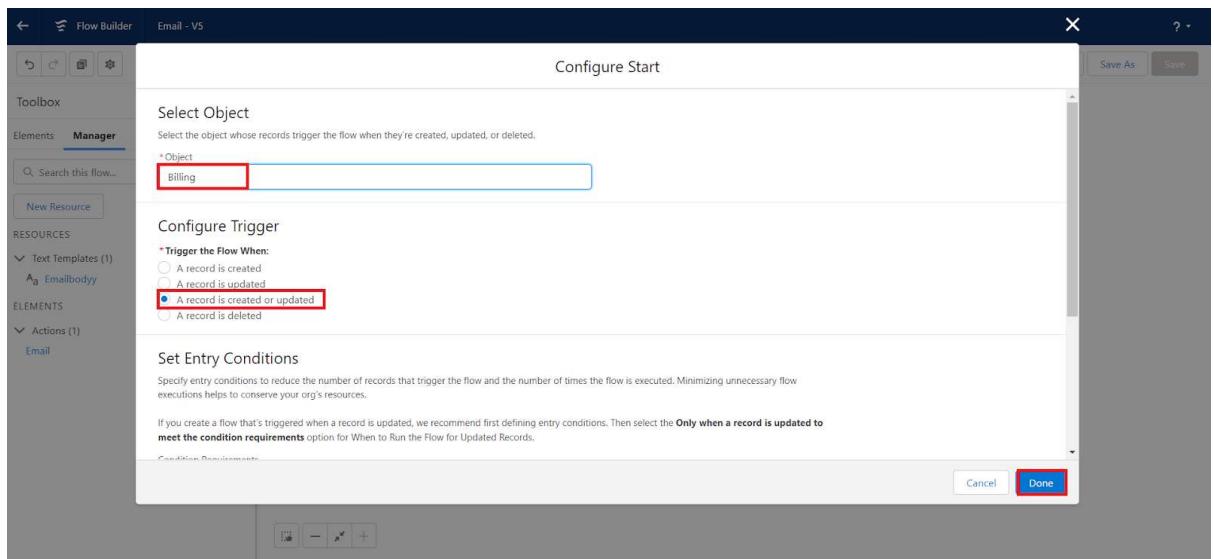
Set Entry Conditions

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

Cancel Done



New Resource

\* Resource Type  
Select...

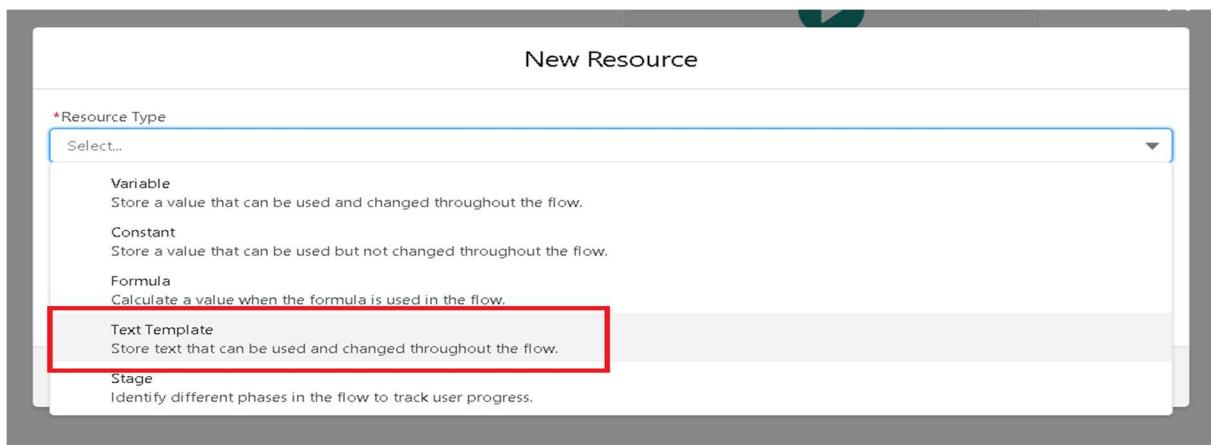
Variable  
Store a value that can be used and changed throughout the flow.

Constant  
Store a value that can be used but not changed throughout the flow.

Formula  
Calculate a value when the formula is used in the flow.

Text Template  
Store text that can be used and changed throughout the flow.

Stage  
Identify different phases in the flow to track user progress.



**Edit Text Template**

* API Name	<input type="text" value="EmailBody"/>
Description	<input type="text"/>
* Body	<input type="text" value="Hello"/> Customer Name: {!\$Record.Item__r.Customer_Name__r.Name}
<a href="#">Cancel</a> <a href="#" style="background-color: #0078d4; color: white; border: 1px solid #0078d4; padding: 2px 10px;">Done</a>	

5. Add Action → Send Email → Fill subject, body, recipient.

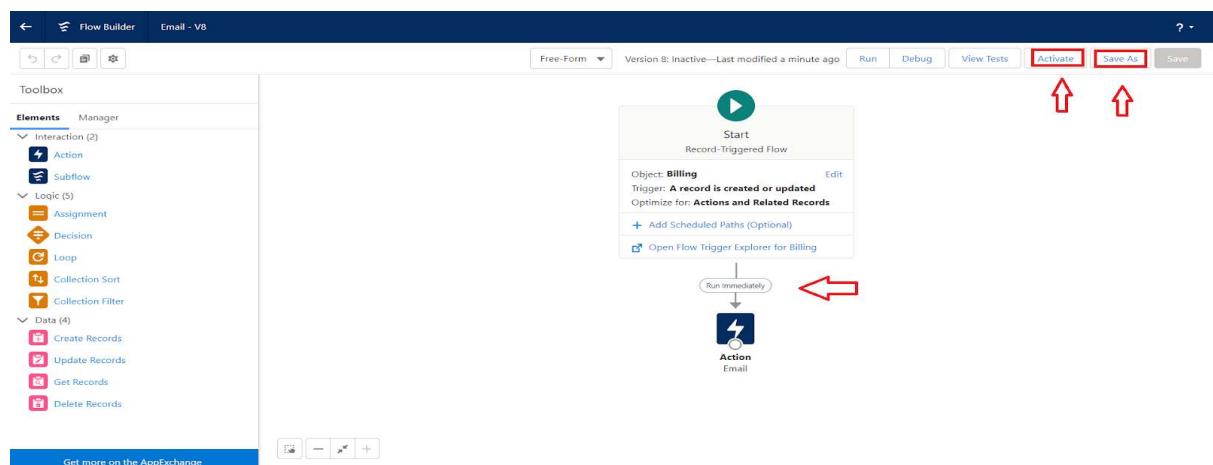
**New Action**

Filter By Category  Order Management Waitlists Notifications <b>Email</b> Generate Disambiguation Feedback Log Chatbots Sales leads SCV Outbound Call Approvals Case	Action 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 <input type="text" value="notice"/> * API Name <input type="text" value="notice"/> Description <input type="text"/>  Set Input Values for the Selected Action Aa Body <input type="text" value="={!Email_Body}"/> <input checked="" type="checkbox"/> Aa Email Template ID <input checked="" type="checkbox" value="Don't Include"/> QD Log Email on Send <input checked="" type="checkbox" value="Don't Include"/> Aa Recipient Address Collection <input type="checkbox"/> <a href="#">Cancel</a> <a href="#" style="background-color: #0078d4; color: white; border: 1px solid #0078d4; padding: 2px 10px;">Done</a>
--	---

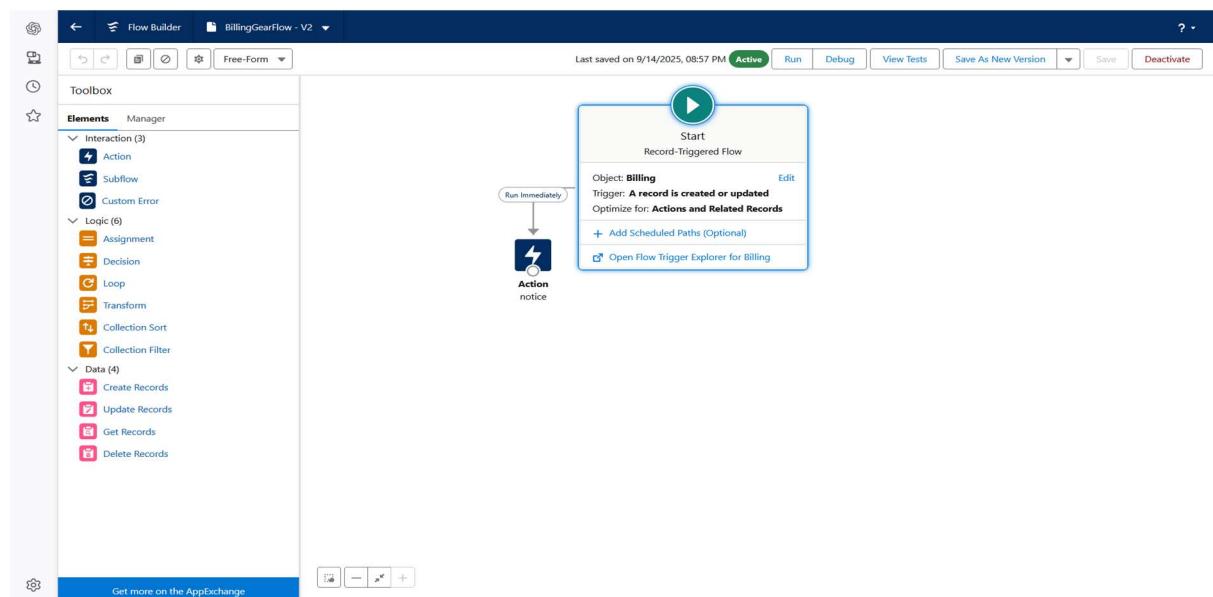
**Save the flow**

*Flow Label  <input type="text"/>	*Flow API Name  <input type="text"/>
Description  <input type="text"/>	
<a href="#">Show Advanced</a>	
<input type="button" value="Cancel"/> <input style="background-color: #0070C0; color: white; border: 1px solid #0070C0; border-radius: 5px; padding: 2px 10px;" type="button" value="Save"/>	

## 6. Connect elements → Save → Activate.



**Flow Is Activated :**



# Conclusion

By completing this project, we learned the practical use of Salesforce. We created objects, fields, relationships, and validation rules to manage data correctly. We also implemented triggers, flows, and dashboards to automate tasks and analyze information. This project gave us hands-on experience to apply CRM solutions in real-world business needs.