

# **CRM Application for Jewel Management**

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

## **TEAM MEMBERS:**

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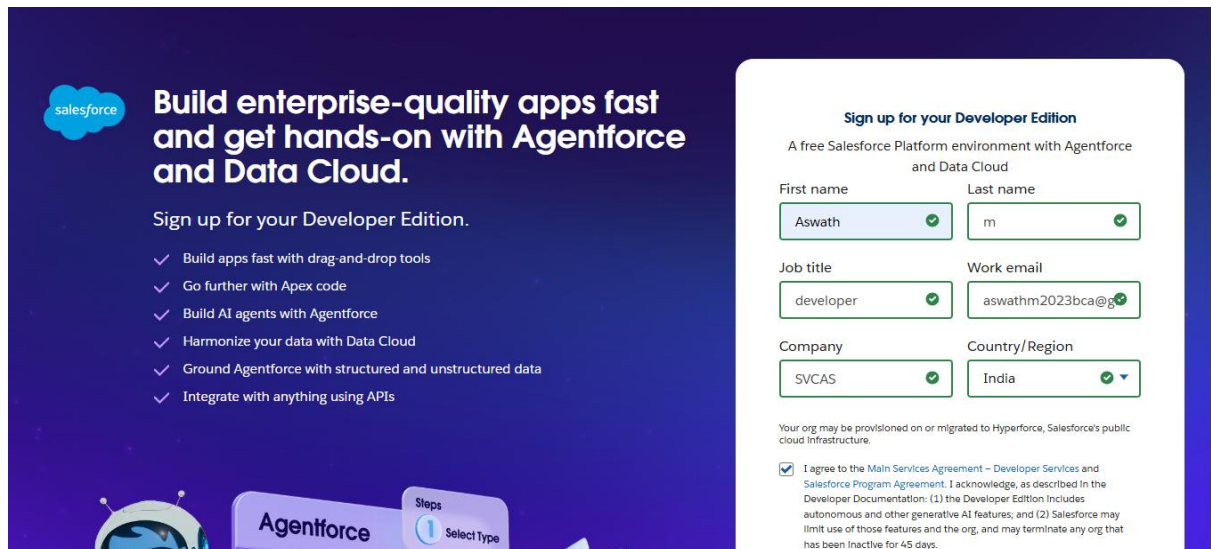
# Introduction :

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>



**Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.**

Sign up for your Developer Edition.

- ✓ Build apps fast with drag-and-drop tools
- ✓ Go further with Apex code
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- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs

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

First name: Aswath ✓ Last name: m ✓

Job title: developer ✓ Work email: aswathm2023bca@gmail.com ✓

Company: SVCAS ✓ Country/Region: India ✓

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☒ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

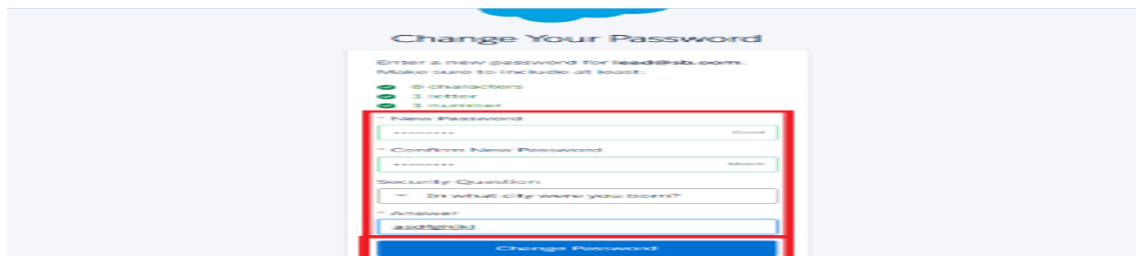
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

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.



**Change Your Password**

Enter a new password for lead@sb.com.  
Make sure to include at least:

- 8 characters
- 3 letters
- 3 numbers

New Password: [text input] ✓

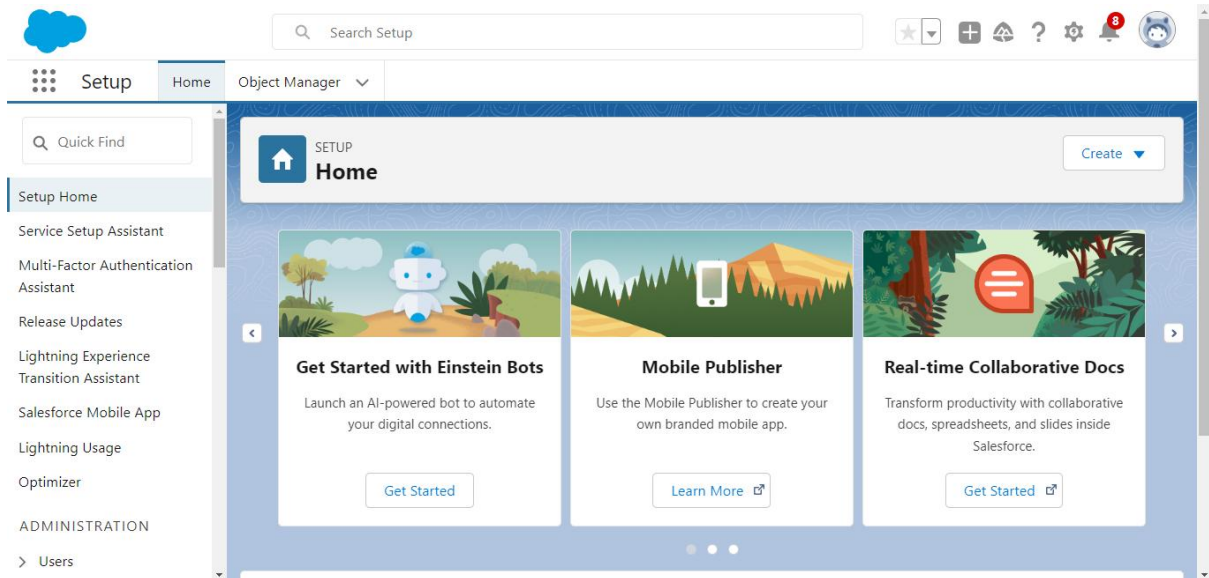
Confirm New Password: [text input] ✓

Security Question: [dropdown menu] In what city were you born?

Answer: [text input] aswath ✓

**Change Password**

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

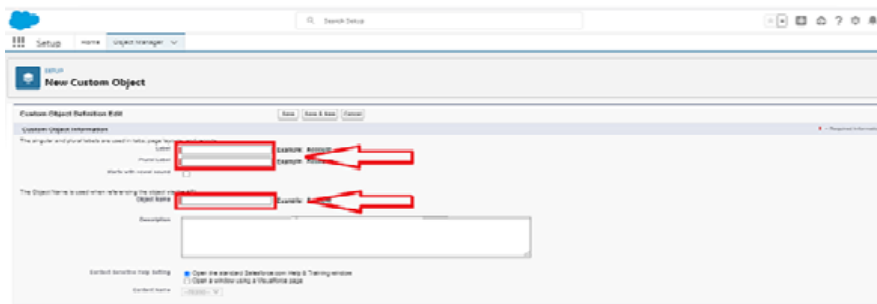


## Create Jewel Customer Object

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



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



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

**Enter Record Name Label and Format**

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

Record Name  Example: Account Name

Data Type

**Optional Features**

☒ Allow Reports  
☐ Allow Activities  
☐ Track Field History  
☐ Allow in Chatter Groups  
☐ Enable Licensing [i](#)

**Object Classification**

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

☒ Allow Sharing  
☒ Allow Bulk API Access  
☒ Allow Streaming API Access

**Deployment Status** [What is this?](#)

☐ In Development  
☒ Deployed

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

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

**Details**

Description

API Name  
Jewel\_Customer\_\_c

Custom  
✓

Singular Label  
Jewel Customer

Plural Label  
Jewel Customers

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Edit Delete

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  Example: Account

Plural Label  Example: Accounts

Starts with vowel sound ☐

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

Object Name  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:
  - Jewel Customer
  - Item
  - Customer Order
  - Price
  - Billing

Custom Object Tabs			New	What Is This?
Action	Label	Tab Style		
Edit   Del	Billings	 Computer		
Edit   Del	Items	 Box		
Edit   Del	Jewel Customers	 Jewel		
Edit   Del	Orders	 Form		
Edit   Del	Prices	 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

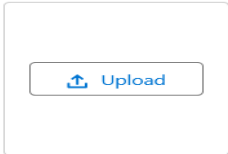
\* App Name ⓘ

\* Developer Name ⓘ


Description ⓘ

#### App Branding

Image ⓘ  

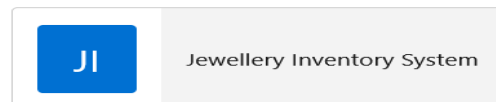


Primary Color Hex Value ⓘ  

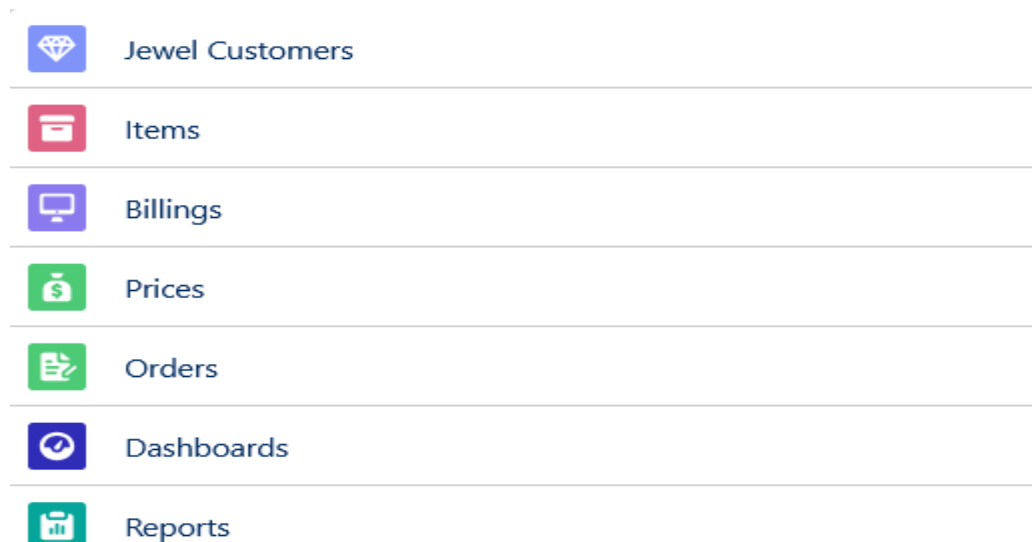


Org Theme Options  
☐ Use the app's image and color instead of the org's custom theme

#### App Launcher Preview



- App Name: **Jewellery Inventory System**
  - Description: *Elevate your look with elegance*
  - 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	<b>Fields &amp; Relationships</b> 7 Items. Sorted by Field Label			
<b>Fields &amp; Relationships</b>	<b>FIELD LABEL</b>	<b>FIELD NAME</b>	<b>DATA TYPE</b>	<b>CONTROLLING FIELD</b>
Page Layouts	Created By	CreatedById	Lookup(User)	
Lightning Record Pages	Customer	Customer__c	Lookup(Jewel Customer)	✓
Buttons, Links, and Actions	Customer Name	Customer_Name__c	Lookup(Jewel Customer)	✓
Compact Layouts	Item	Item__c	Master-Detail(Item)	✓
Field Sets	Last Modified By	LastModifiedById	Lookup(User)	
Object Limits	Order Id	Name	Auto Number	✓
Record Types	Order Status	Order_Status__c	Picklist	
Related Lookup Filters				
Search Layouts				

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	<b>Fields &amp; Relationships</b> 11 Items. Sorted by Field Label			
<b>Fields &amp; Relationships</b>	<b>FIELD LABEL</b>	<b>FIELD NAME</b>	<b>DATA TYPE</b>	<b>CONTROLLING FIELD</b>
Page Layouts	City	City__c	Text(20)	
Lightning Record Pages	Country	Country__c	Text(18)	
Buttons, Links, and Actions	Created By	CreatedById	Lookup(User)	
Compact Layouts	Customer name	Name	Text(80)	✓
Field Sets	Email	Email__c	Email	
Object Limits	Last Modified By	LastModifiedById	Lookup(User)	
Record Types	Owner	OwnerId	Lookup(User, group)	✓
Related Lookup Filters	Phone	Phone__c	Phone	
Search Layouts	State	State__c	Text(20)	
List View Button Layout				
Restriction Rules				

1. City → Text(20)
2. Phone → Phone



## Step 4: Create Fields in Item Object

Priority	Priority__c	Picklist
Item Type	Item_Type__c	Picklist

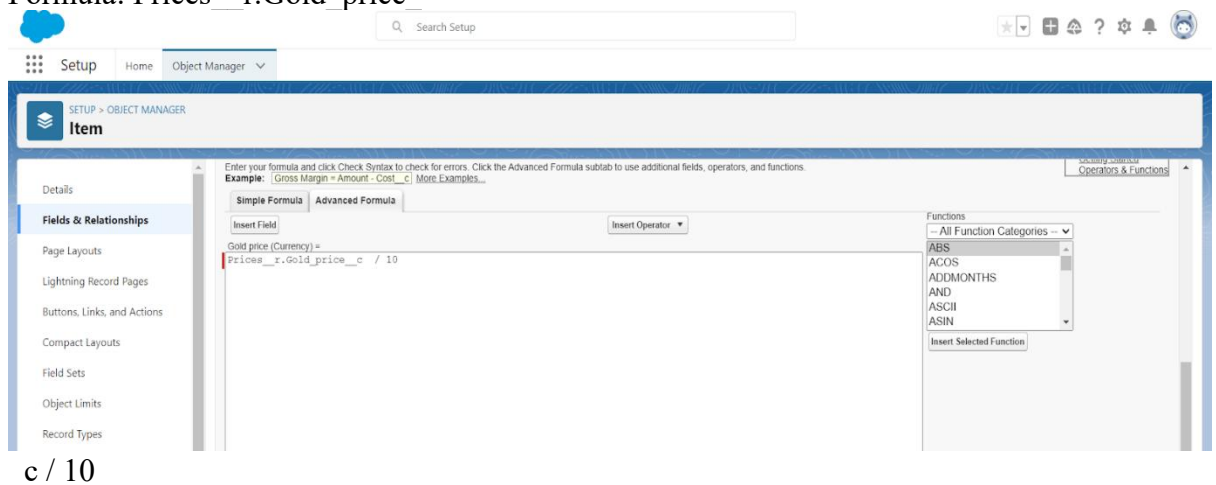
1. Purity → Number(2)
2. Item Type → Picklist (Values: Gold, Silver)

## 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



Setup - Object Manager - Item

Fields & Relationships

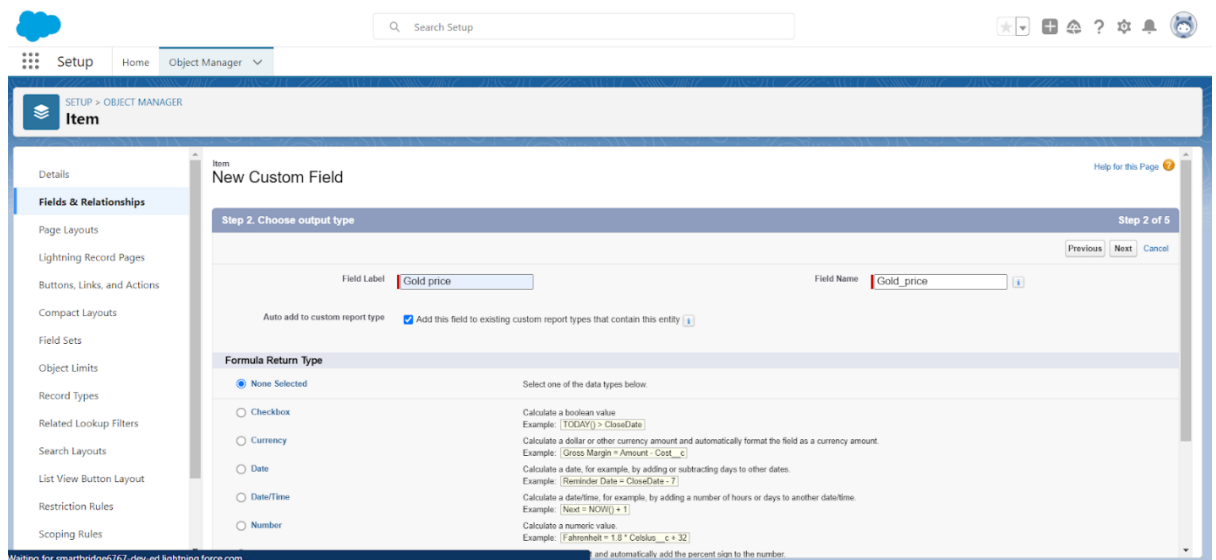
Advanced Formula

Gold price (Currency) =

Prices\_\_r.Gold\_price\_\_c / 10

Functions

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



Setup - Object Manager - Item

New Custom Field

Step 2. Choose output type

Field Label: Gold price

Field Name: Gold\_price\_\_c

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:

- ☐ Checkbox: Calculate a boolean value. Example: (GROSS\_MARGIN > 0) >> CloseDate
- ☐ Currency: Calculate a dollar or other currency amount and automatically format the field as a currency amount. Example: (GROSS\_MARGIN \* Amount\_\_c) - Cost\_\_c
- ☐ Date: Calculate a date, for example, by adding or subtracting days to other dates. Example: (Reminder Date - CloseDate - 7)
- ☐ DateTime: Calculate a datetime, for example, by adding a number of hours or days to another datetime. Example: (Next - NOW()) + 1
- ☐ Number: Calculate a numeric value. Example: (Fahrenheit = 1.8 \* Celsius\_\_c + 32)

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

## Module 4: Remaining Fields & Validation Rules

### Step 1: Add Remaining Fields

SETUP Object Manager					
52+ Items. Sorted by Deployed		Q Quick Find		Schema Builder	Create ▼
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 11 Items, Sorted by Indexed				
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		
Scoping Rules					
Object Access					

#### ◆ Price Object

- Silver Price → Currency(8,5)

SETUP > OBJECT MANAGER					
Price					
Details	Fields & Relationships 6 Items, Sorted by Field Label				
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedById	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)		
Record Types					

## ◆ Item Object

SETUP > OBJECT MANAGER					
Item					
Details	<b>Fields &amp; Relationships</b>		23 Items, Sorted by Field Label		
<b>Fields &amp; Relationships</b>	<b>FIELD LABEL</b>	<b>FIELD NAME</b>	<b>DATA TYPE</b>	<b>CONTROLLING FIELD</b>	<b>INDEXED</b>
Page Layouts	Amount	Amount__c	Formula (Currency)		
Lightning Record Pages	Created By	CreatedById	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					
Details	<b>Fields &amp; Relationships</b>		23 Items, Sorted by Field Label		
<b>Fields &amp; Relationships</b>	<b>FIELD LABEL</b>	<b>FIELD NAME</b>	<b>DATA TYPE</b>	<b>CONTROLLING FIELD</b>	<b>INDEXED</b>
Page Layouts	Making Charges	Making_Charges__c	Formula (Currency)		
Lightning Record Pages	Ornament	Ornament__c	Text(20)		
Buttons, Links, and Actions	Owner	OwnerId	Lookup(User Group)		✓
Compact Layouts	Percentage	Percentage__c	Number(2, 0)		
Field Sets	Price	Price__c	Lookup(Price)		✓
Object Limits	Priority	Priority__c	Picklist		
Record Types	Purity	Purity__c	Number(2, 0)		
Related Lookup Filters	Purity Gold Price	Purity_Gold_Price__c	Formula (Currency)		
Search Layouts	Record Type	RecordTypeId	Record Type		✓
List View Button Layout	Silver Price	Silver_Price__c	Formula (Number)		
Restriction Rules	Stone Weight	Stone_Weight__c	Number(5, 5)		
Scoping Rules	Stone/Other Price	Stone_Other_Price__c	Currency(8, 2)		
Object Access	Total Weight	Total_Weight__c	Formula (Number)		
Triggers	Weight	Weight__c	Number(8, 5)		
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					
Details	Fields & Relationships 7 Items, Sorted by Field Label				
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)		
Lightning Record Pages	Customer	Customer__c	Lookup(Jewel Customer)		✓
Buttons, Links, and Actions	Customer Name	Customer_Name__c	Lookup(Jewel Customer)		✓
Compact Layouts	Item	Item__c	Master-Detail(Item)		✓
Field Sets	Last Modified By	LastModifiedById	Lookup(User)		
Object Limits	Order Id	Name	Auto Number		✓
Record Types	Order Status	Order_Status__c	Picklist		
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)

SETUP > OBJECT MANAGER					
Billing					
Details	Fields & Relationships 18 Items, Sorted by Internal				
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	CreatedById	Lookup(User)		
Object Limits	Last Sent Email Body	Last_Sent_Email_Body__c	Long Text Area(2768)		
Record Types	Last Email Sent Date	Last_Email_Sent_Date__c	DateTime		
Related Lookup Filters	Paid Amount	Paid_Amount__c	Currency(16, 0)		
Search Layouts	Paying Amount	Paying_Amount__c	Currency(16, 0)		
List View Button Layout	Total Amount	Total_Amount__c	Formula (Currency)		
Restriction Rules	KDM Charge	KDM_Charge__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

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

Edit Item Custom Field

Expected Days Of Return

Custom Field Definition Edit

Change Field Type

Promote to Global Value Set

Save

Cancel

Field Information

Field Label

Expected Days Of Return

Data Type

Picklist

Field Name

Expected\_Days\_Of\_Return

Description

Help Text

Data Owner

User

Field Usage

--None--

Data Sensitivity Level

--None--

Compliance Categorization

Available

Chosen

- 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

1. 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)) )`
2. 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

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Validation Rules

2 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Postal_Code	Zip/Postal Code	Must contain 6 digits	✓	Vasanth K, 9/4/2025, 10:15 PM	▼
ValidationRule_For_JewelCustomerObject	Top of Page	Please fill Required fields	✓	Vasanth K, 9/4/2025, 10:16 PM	▼

#### 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

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Validation Rules

1 Items, Sorted by Rule Name

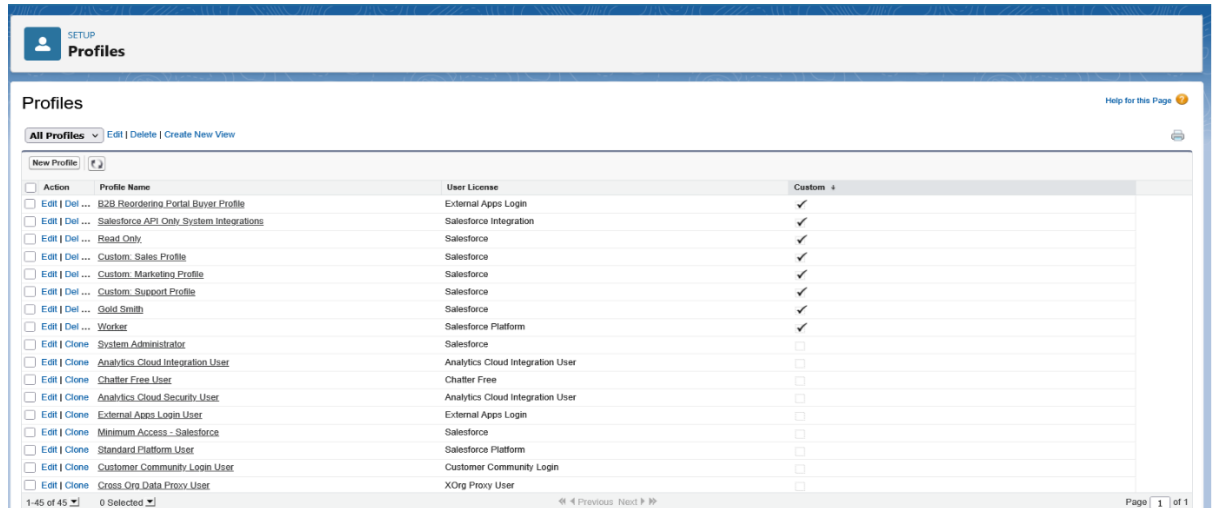
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
ValidationRule_For_Item	Top of Page	Please fill Required fields	✓	Vasanth K, 9/4/2025, 10:21 PM

New

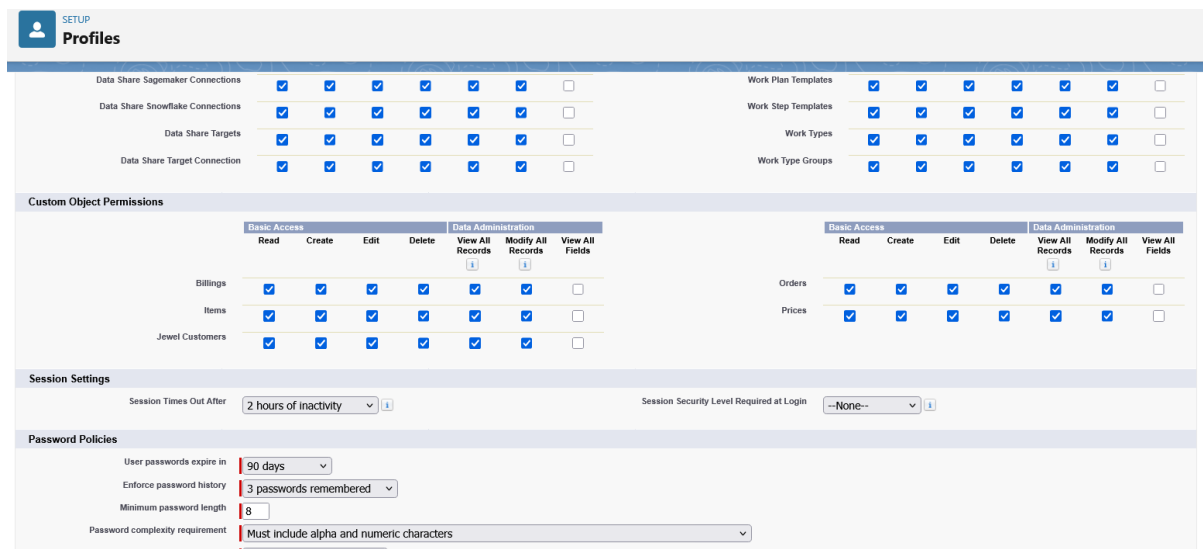
## Module 5: Profiles, Roles & Users

### Step 1: Create Gold Smith Profile

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



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



4. Save.

## Step 2: Create Worker Profile

### Profile Edit Worker

Set the permissions and page layouts for this profile.

**Profile Edit**

SaveSave & NewCancel

NameWorker

User LicenseSalesforce Platform

Description

Custom Profile ✓

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

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

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

**Session Settings**

Session Times Out After2 hours of inactivity

Session Security Level Required at Login--None--

**Password Policies**

User passwords expire in90 days

Enforce password history3 passwords remembered

Minimum password length8

Password complexity requirementMust include alpha and numeric characters

Password question requirementCannot contain password

Maximum invalid login attempts10

Lockout effective period15 minutes

Obscure secret answer for password resets☐

Require a minimum 1 day password lifetime☐

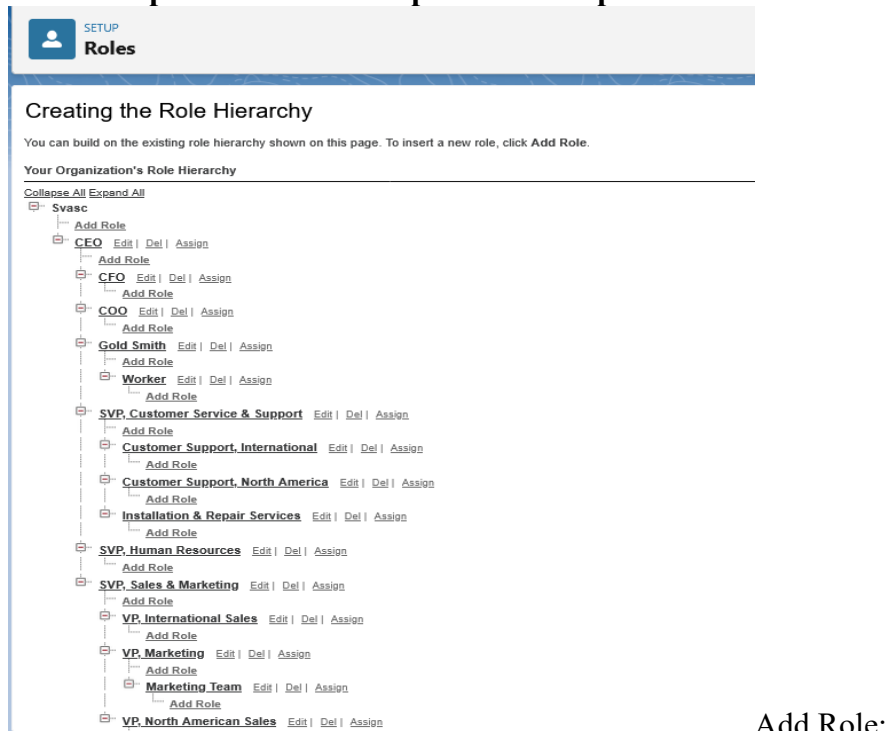
Don't immediately expire links in forgot password emails☐

SaveSave & NewCancel

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

## Step 3: Create Roles

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



The screenshot shows the 'Roles' setup page in Salesforce. At the top, there's a 'SETUP Roles' header. Below it, the title 'Creating the Role Hierarchy' is followed by a note: 'You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.' The main section is titled 'Your Organization's Role Hierarchy' and shows a tree structure. The root is 'Svasc', which has a sub-role 'CEO'. 'CEO' has sub-roles 'CFO' and 'COO'. 'CFO' has a sub-role 'Gold Smith'. 'Gold Smith' has a sub-role 'Worker'. 'Worker' has a sub-role 'SVP, Customer Service & Support'. 'SVP, Customer Service & Support' has sub-roles 'Customer Support, International' and 'Customer Support, North America'. 'Customer Support, North America' has a sub-role 'Installation & Repair Services'. 'Installation & Repair Services' has a sub-role 'SVP, Human Resources'. 'SVP, Human Resources' has a sub-role 'SVP, Sales & Marketing'. 'SVP, Sales & Marketing' has sub-roles 'VP, International Sales' and 'VP, Marketing'. 'VP, Marketing' has a sub-role 'Marketing Team'. 'Marketing Team' has a sub-role 'VP, North American Sales'. Each role in the hierarchy has an 'Add Role' button next to it. To the right of the hierarchy, there is a text label 'Add Role:'.

2.
  - **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

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

SETUP > OBJECT MANAGER			
Item			
Details	<b>Page Layouts</b> 3 Items, Sorted by Page Layout Name		
Fields & Relationships			
Page Layouts			
Lightning Record Pages			
Buttons, Links, and Actions			
Compact Layouts			
	<b>PAGE LAYOUT NAME</b>	<b>CREATED BY</b>	<b>MODIFIED BY</b>
	Item Layout	Vasanth K, 9/4/2025, 6:56 PM	Vasanth K, 9/4/2025, 9:31 PM
	Page Layout for Gold	Vasanth K, 9/4/2025, 10:57 PM	Vasanth K, 9/4/2025, 10:58 PM
	Page Layout for Silver	Vasanth K, 9/4/2025, 11:00 PM	Vasanth K, 9/4/2025, 11:01 PM

### ◆ Record Types

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

SETUP > OBJECT MANAGER			
Item			
Details	<b>Record Types</b> 2 Items, Sorted by Record Type Label		
Fields & Relationships			
Page Layouts			
Lightning Record Pages			
Buttons, Links, and Actions			
Compact Layouts			
	<b>RECORD TYPE LABEL</b>	<b>DESCRIPTION</b>	<b>ACTIVE</b>
	Gold	Gold Items Information	✓
	Silver	Silver Items Information	✓

## Step 6: Create Permission Set

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

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

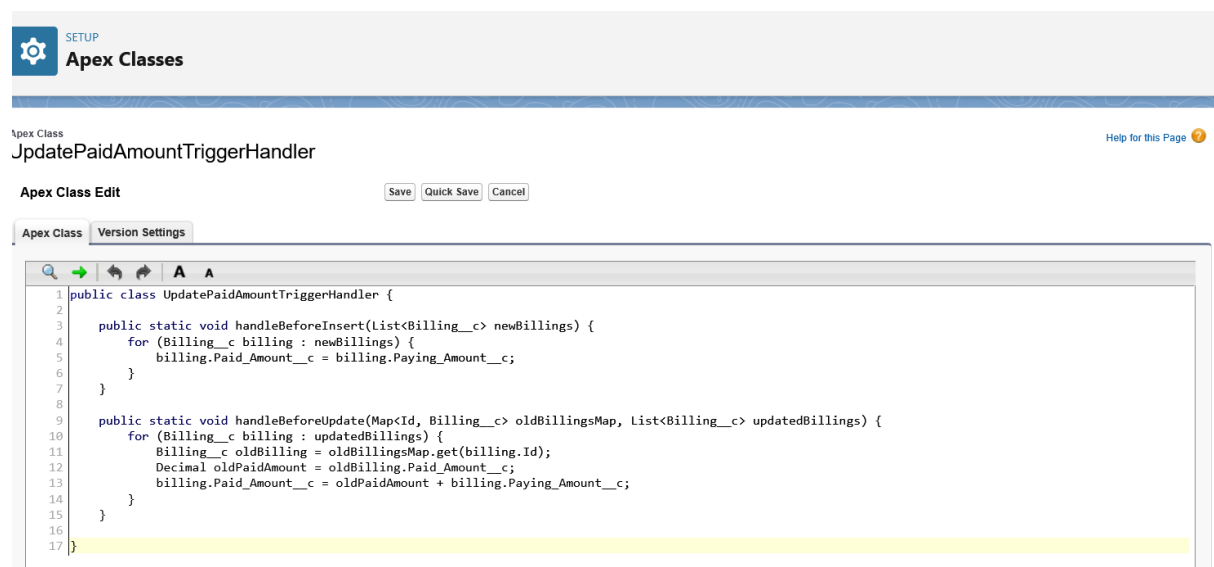
- Assign this permission set to **Worker Users**.

## 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);  
    }  
}
```

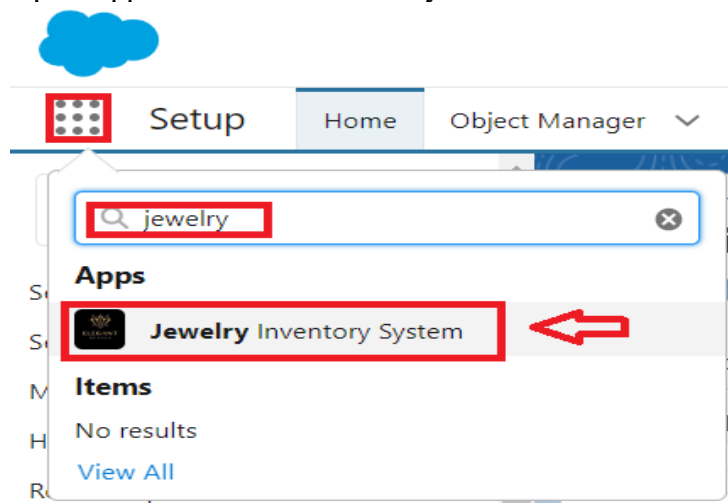
[SETUP](#) > [OBJECT MANAGER](#)

## Billing

Details	<b>Triggers</b> <span>1 Items. Sorted by Label</span> <input type="text"/> Quick Find <button>New</button>			
Fields & Relationships	LABEL	API VERSION	SIZE WITHOUT COMMENTS	MODIFIED BY
Page Layouts	UpdatePaidAmountTrigger	64.0	310	Vasanth K, 9/4/2025, 11:26 PM
Lightning Record Pages				
Buttons, Links, and Actions				
Compact Layouts				

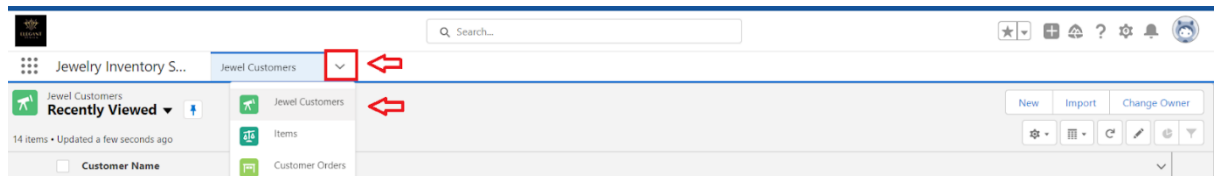
### Step 3: Create Records

1. Open App Launcher → Jewellery



- ## 2. Inventory System.

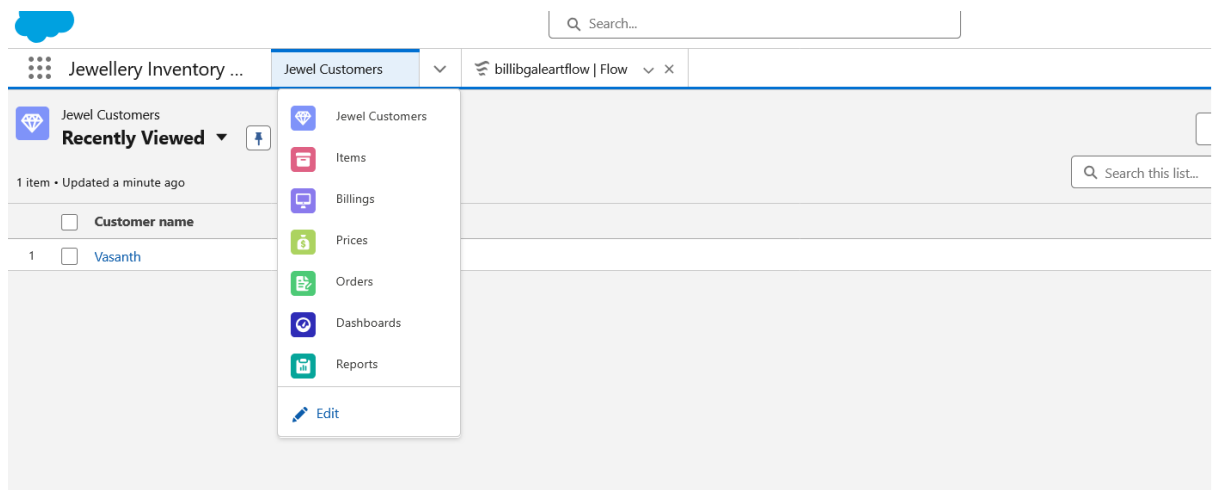
3. Create minimum 10 records for each object: Jewel Customer, Price, Item, Customer Order, Billing.
4. • Click on Drop Down and Click on the Jewel Customer tab.
5. • Click New.



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							
Recent							
2 items							
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed	
Recent	New Items Report		Private Reports	Vasanth K	9/4/2025, 11:45 PM		
Created by Me	New Jewel Customers Report		Private Reports	Vasanth K	9/4/2025, 11:42 PM		
Private Reports							
Public Reports							
All Reports							
FOLDERS							
All Folders							
Created by Me							
Shared with Me							
FAVORITES							

- Items with Billings
- 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.

Recent						
1 item						
Q Search recent dashboards... New Dashboard New Folder						
DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	GoldSmith Overview	Details	Private Dashboards	Vasanth K	9/4/2025, 11:40 PM	
Created by Me						

## Step 6: Create Flow (Email Automation)

1. Setup → Flows → New Flow.

The screenshot shows the Salesforce Setup interface. In the left sidebar, 'Setup' is selected, and 'Flows' is highlighted under 'Process Automation'. The main content area displays 'All Flows' with a table of existing flows. A 'New Flow' button is visible in the top right corner.

Flow Label	Process Type	Ac...	Te...	Package State	Pa...	Last Modified By	Last Modified ...
Ac Amount update	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Veera Venkata Varaprasad Androthu	07/06/2023, 11:35 am
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Close Change Request & Related Issues	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

2. Select Record-Triggered Flow.

The screenshot shows the 'New Flow' dialog in Salesforce. The 'Record-Triggered Flow' option is selected, indicated by a blue checkmark and a red box. The 'Create' button is visible at the bottom right.

Flow Type	Description
Screen Flow	Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.
Schedule-Triggered Flow	Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.
Autolaunched Flow (No Trigger)	Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.
Record-Triggered Flow	Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
Platform Event—Triggered Flow	Launches when a platform event message is received. This autolaunched flow runs in the background.
Record-Triggered Orchestration	Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.

### 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 - VS

Toolbox

Elements

Manager

Search this flow...

New Resource

RESOURCES

Text Templates (1)

Emailbody

ELEMENTS

Actions (1)

Email

### 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

Description

\* Body ⓘ

Insert a resource... View as Plain Text ▼

Hello

Customer Name: {!\$Record.Item\_\_r.Customer\_Name\_\_r.Name}

Cancel Done

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

### New Action

Filter By  
Category ▼

- Order Management
- Waitlists
- Notifications
- Email**
- Generate Disambiguation
- Feedback Log
- Chatbots
- Sales leads
- SCV Outbound Call
- Approvals
- Case

Action

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

Description

Set Input Values for the Selected Action

A<sub>a</sub> Body ⓘ

{!Email\_Body}

☒

A<sub>a</sub> Email Template ID

☐ Don't Include

Log Email on Send

☐ Don't Include

A<sub>a</sub> Recipient Address Collection

☐

Cancel Done

### Save the flow

**\*Flow Label**

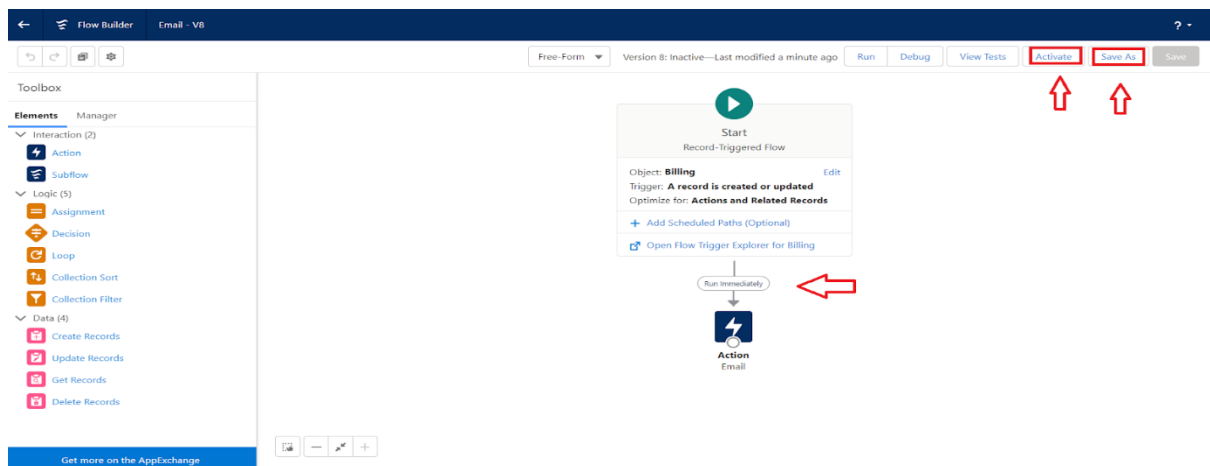
**\*Flow API Name**

Description

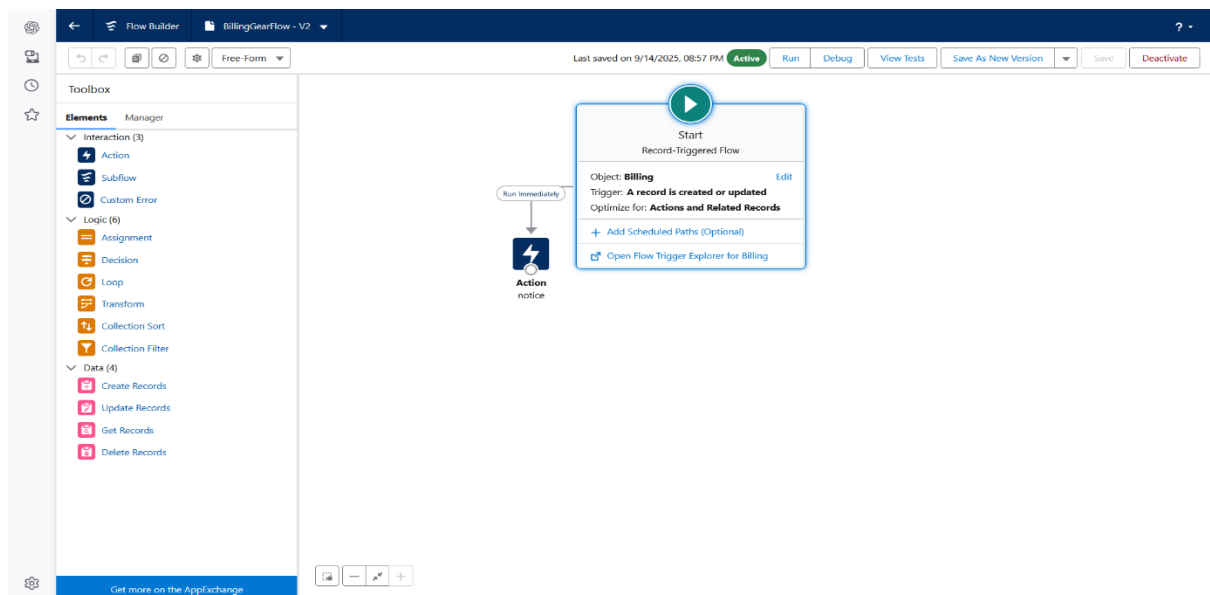
Show Advanced

Cancel
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.