

# CRM Application for Jewel Manager

## Salesforce

### Introduction:

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

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

### What Is Salesforce?

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

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

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organised something like this:

<https://youtu.be/r9EX3IGde5k>

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## MILESTONE-1

### Creating Developer Account

Creating a developer org in salesforce.

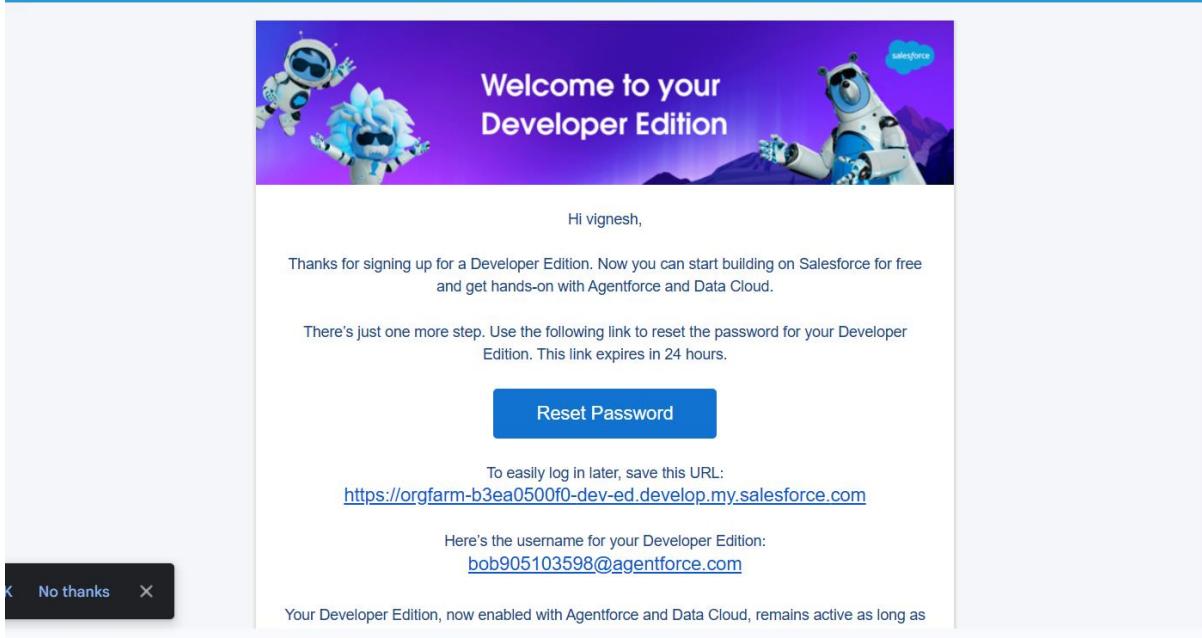
1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :

1. First name : VIGNESH
2. Last name : D
3. Email : bob905103@gmail.com
4. Role : Developer
5. Company : Gayatri degree college-Tirupati
6. County : India
7. Postal Code : 517501
8. Username : [bob905103598@agentforce.com](mailto:bob905103598@agentforce.com)

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## Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account

3. Give a password and answer a security question and click on change password.

The screenshot shows the "Change Your Password" page. It has a "salesforce" logo at the top. The main title is "Change Your Password". A sub-instruction says "Enter a new password for singlesignon@settings.com. Make sure to include at least:". There are four radio buttons for password complexity: "12 characters", "1 letter", "1 number", and "1 special character". Below these are fields for "New Password" and "Confirm New Password". Under "Security Question", it asks "In what city were you born?" with a dropdown menu showing "Answer". At the bottom, there's a "Change Password" button and a note: "Password was last changed on 13/06/2025, 2:07 pm." The footer says "© 2025 Salesforce, Inc. All rights reserved."

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

The screenshot shows the Salesforce Setup Home page. The left sidebar contains navigation links for Setup Home, Salesforce Go, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, and Sales Cloud Everywhere. The main content area features three cards: 'Data Cloud' (Setup), 'Get Started with Einstein Bots' (Setup), and 'Mobile Publisher' (Setup). Below these cards is a section titled 'Most Recently Used' which lists 10 items: 'UpdatePaidAmountTrigger' (Apex Trigger, Billing), 'BillingTrigger' (Apex Trigger, Billing), and 'UpdatePaidAmountTriggerHandler' (Apex Class, Billing).

NAME	TYPE	OBJECT
UpdatePaidAmountTrigger	Apex Trigger	Billing
BillingTrigger	Apex Trigger	Billing
UpdatePaidAmountTriggerHandler	Apex Class	Billing

# CRM Application for Jewel Manager

## MILESTONE-2

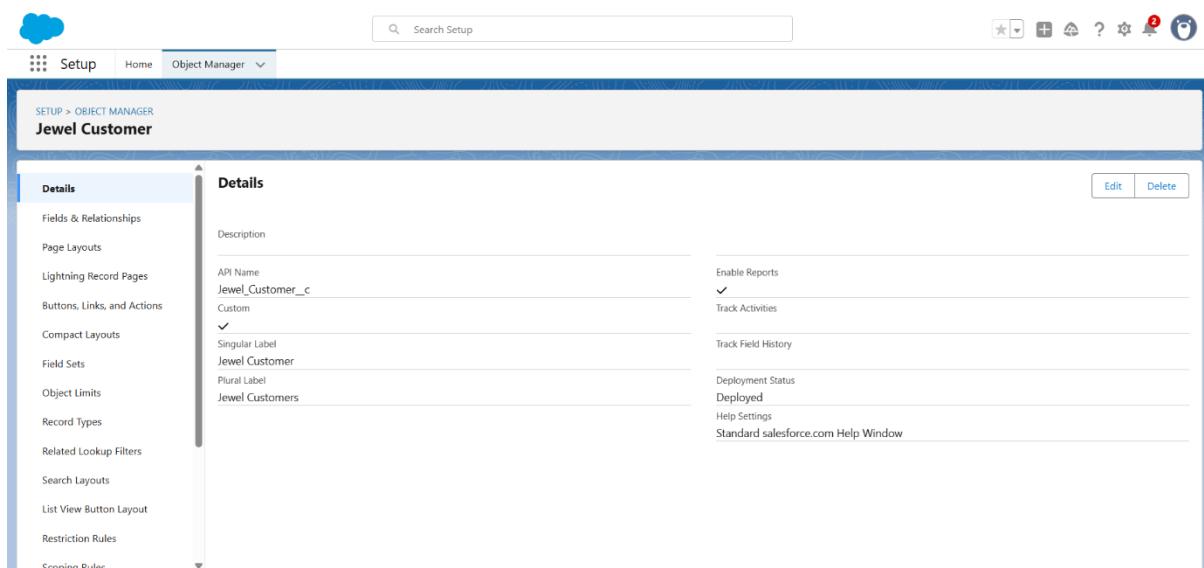
### Object

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



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## 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
  1. Record Name >> Item Id
  2. Data Type >> Auto Number
  3. Display Format >> Item-{00}
  4. Starting Number >> 1

2. Click on Allow reports.

3. Allow search >> Save.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A new object named 'Item' is being created. The 'Details' section on the right contains the following fields and values:

- Description: (empty)
- API Name: Item\_c
- Custom: ✓
- Singular Label: Item
- Plural Label: Items
- Enable Reports: ✓
- Track Activities: (empty)
- Track Field History: (empty)
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

The left sidebar lists various configuration options for the object, such as 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, and Scoping Rules.

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## 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

1. Record Name >> Customer Order No
2. Data Type >> Auto Number
3. Display Format >> Order - {0000}
4. Starting Number >> 1

4. Click on Allow reports.

5. Allow search >> Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Customer Order'. On the left, a sidebar lists various configuration options: 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, and Scoping Rules. The main content area is titled 'Details' and contains the following fields:

Description	API Name <b>Customer_Order_c</b>	Enable Reports <input checked="" type="checkbox"/>
Singular Label <b>Customer Order</b>	Custom	Track Activities <input type="checkbox"/>
Plural Label <b>Customer Orders</b>		Track Field History
		Deployment Status Deployed
		Help Settings
		Standard salesforce.com Help Window

At the bottom right of the main area are 'Edit' and 'Delete' buttons.

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## 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.
1. Enter the label name >> Price
2. Plural label name >> Prices
3. Enter Record Name Label and Format
  1. Record Name >> Item Price
  2. Data Type >> Text
4. Click on Allow reports.
5. Allow search >> Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Price'. On the left, a sidebar lists various object configuration options: 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, and Scoping Rules. The right side displays the 'Details' tab for the 'Price' object. It shows the following fields and settings:

- Description:** A text input field.
- API Name:** `Price__c`
- Custom:** A checkbox that is checked.
- Singular Label:** `Price`
- Plural Label:** `Prices`
- Enable Reports:** A checkbox that is checked.
- Track Activities:** A checkbox that is unchecked.
- Track Field History:** A checkbox that is unchecked.
- Deployment Status:** `Deployed`
- Help Settings:** `Standard salesforce.com Help Window`

At the bottom right of the details panel are 'Edit' and 'Delete' buttons.

# CRM Application for Jewel Manager

## 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.
1. Enter the label name >> Billing
2. Plural label name >> Billings
3. Enter Record Name Label and Format
  1. Record Name >> Billing Name
  2. Data Type >> Text
4. Click on Allow reports.
5. Allow search >> Save.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A new object named 'Billing' is being created. The left sidebar lists various object configuration options like Fields & Relationships, Page Layouts, and Record Types. The main 'Details' section shows the API name as 'Billing\_c' and the singular label as 'Billing'. The plural label is also set to 'Billings'. Other settings include enabling reports and tracking activities. Deployment status is marked as 'Deployed'.

Details	
Description	
API Name	Billing_c
Custom	<input checked="" type="checkbox"/>
Singular Label	Billing
Plural Label	Billings
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

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## MILESTONE-3

### Tabs

### 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.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. A search bar at the top contains 'tabs'. On the left, a sidebar has 'User Interface' expanded, with 'Tabs' selected. The main content area displays a 'Custom Object Tab' for 'Jewel Customers'. The 'Custom Tab Definition Detail' section shows the following information:

Tab Label	Jewel Customers	Object	Jewel Customer	Tab Style	Airplane
Description				Splash Page Custom Link	
Created By	vignesh.D. 6/14/2025, 6:03 AM			Modified By	vignesh.D. 6/14/2025, 6:03 AM

At the bottom of the page, there is a URL: <https://orafarm-b3ea050010-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01iq000000x0f7/Details/view>.

**Note:** Now create tabs for Customer Order, Price, Billing objects.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. A search bar at the top contains 'tabs'. On the left, a sidebar has 'User Interface' expanded, with 'Tabs' selected. The main content area displays a 'Custom Tabs' section. The 'Custom Object Tab' section shows the following information:

Action	Label	Tab Style	Description
Link	Order	Card	
Edit	Customer Orders	Card	
Link	Price	Card	
Edit	Object Customers	Card	
Link	Billing	Card	

Below this, sections for 'Web Tabs' and 'Visualforce Tabs' show no tabs have been defined. At the bottom of the page, there is a URL: <https://orafarm-b3ea050010-dev-ed.develop.lightning.force.com/lightning/setup/CustomerTabs/01iq000000x0f7>.

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## MILESTONE-4

### The Lighting App

Create a Lightning App

To create a lightning app page:

1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.
2. Fill the app name in app details and branding as follow

App Name : Jewelry 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.

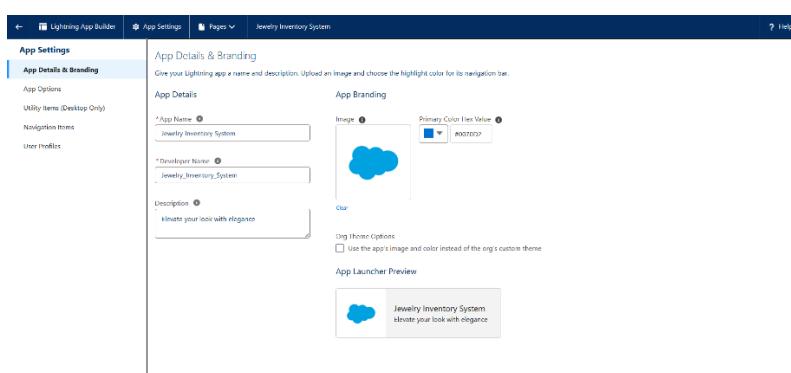
3. Then click Next >> (App option page) Set Navigation Style as Console Navigation >> Next.

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

5. To Add Navigation Items: 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.

6. To Add User Profiles:

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



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## MILESTONE-5

### Fields

#### 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.

**Customer Order Custom Field**

**Customer**

**Custom Field Definition Detail**

Field Label	Customer	Object Name	Customer_Order
Field Name	Customer	Data Type	Lookup
API Name	Customer__c		
Description	Help Text		
Data Owner	Data Owner		
Field Usage	Field Usage		
Data Sensitivity Level	Data Sensitivity Level		
Compliance Categorization	Compliance Categorization		
Created By	vignesh_D_6/14/2025, 6:11 AM	Modified By	vignesh_D_6/14/2025, 6:11 AM

**Lookup Options**

Related To	Jewel Customer	Child Relationship Name	Customer_Orders
Related List Label	Customer Orders		
Required	<input checked="" type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

**Lookup Filter**

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

### To Create a Master-Detail relationship :

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

The screenshot shows the Salesforce Setup interface for creating a custom field named 'Item' on the 'Customer Order' object. The 'Fields & Relationships' tab is selected in the sidebar. The main panel displays the 'Custom Field Definition Detail' for the 'Item' field. Key details shown include:

- Field Information:** Field Label: Item, Field Name: Item, API Name: Rem\_\_c, Description: Help Text, Data Owner: Field Usage, Data Sensitivity Level: Compliance Categorization.
- Object Name:** Customer Order
- Data Type:** Master-Detail
- Created By:** vignesh.D, 6/14/2025, 6:14 AM
- Modified By:** vignesh.D, 6/14/2025, 6:14 AM
- Master-Detail Options:** Related To: Item, Related List Label: Customer Orders, Sharing Setting: Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
- Lookup Filter:** Reparentable Master Detail:

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

**Jewel Customer Custom Field**

**Custom Field Definition Detail**

Field Information		General Options	
Field Label	City	Object Name	Jewel Customer
Field Name	City	Data Type	Text
API Name	City_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	vignesh.D. 6/14/2025, 6:15 AM	Modified By	vignesh.D. 6/14/2025, 6:15 AM
Required	<input type="checkbox"/>	Unique	<input type="checkbox"/>
Case Sensitive	<input type="checkbox"/>	External ID	<input type="checkbox"/>
Default Value			

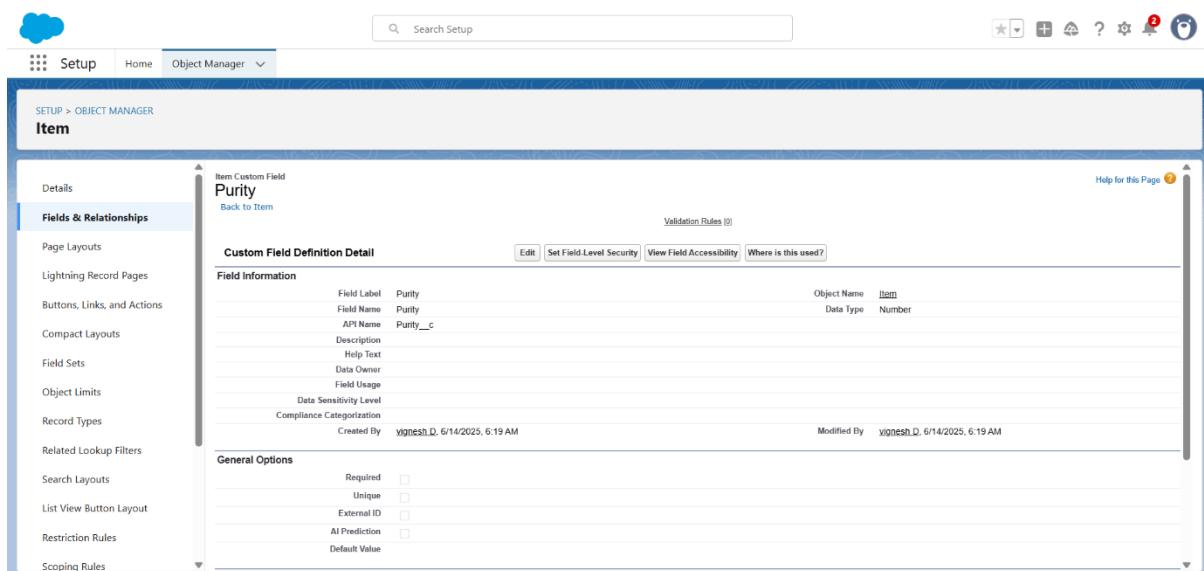
**Note:** Now create fields for Jewel Customer Phone(phone),Email(email).

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## 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 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 .

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The screenshot shows the Salesforce Object Manager interface. A custom field named 'Item Type' has been created for the 'Item' object. The field is defined as a picklist type with the API name 'Item\_Type\_\_c'. The 'Fields & Relationships' tab is selected in the sidebar.

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

The screenshot shows the Salesforce Object Manager interface. A custom field named 'Gold Price' has been created for the 'Price' object. The field is defined as a currency type with a length of 8 and 5 decimal places. The 'Fields & Relationships' tab is selected in the sidebar.

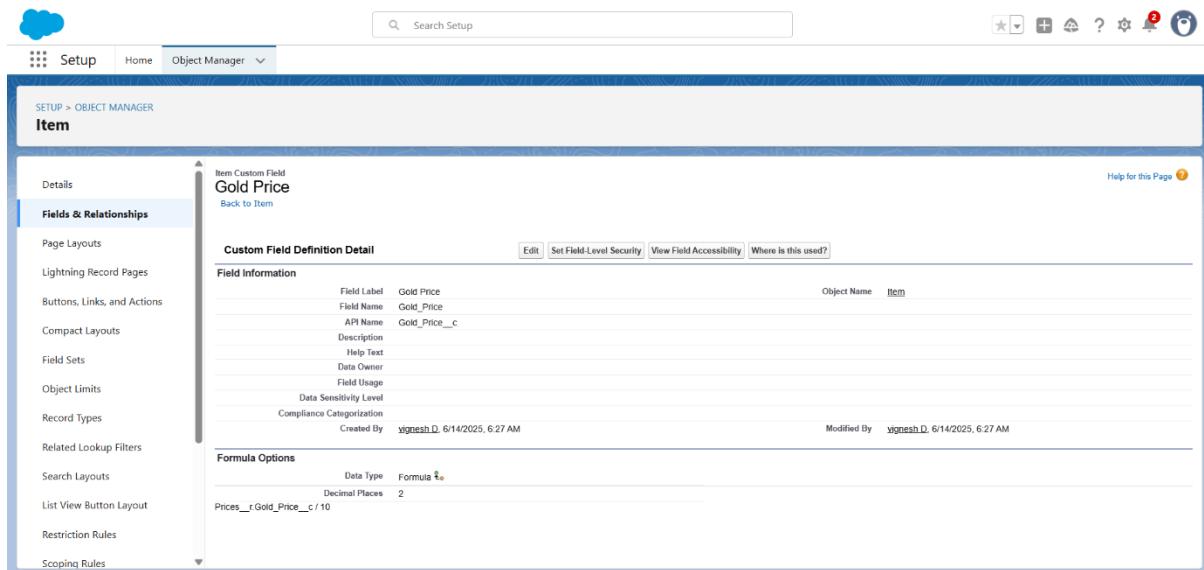
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## Creating Formula Field(Cross Object) in Item Object

### 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.
5. Under Advanced Formula write down the formula : Prices\_\_r.Gold\_price\_\_c /10.
6. Click “Check Syntax” and Next >> Next >> Save & New.

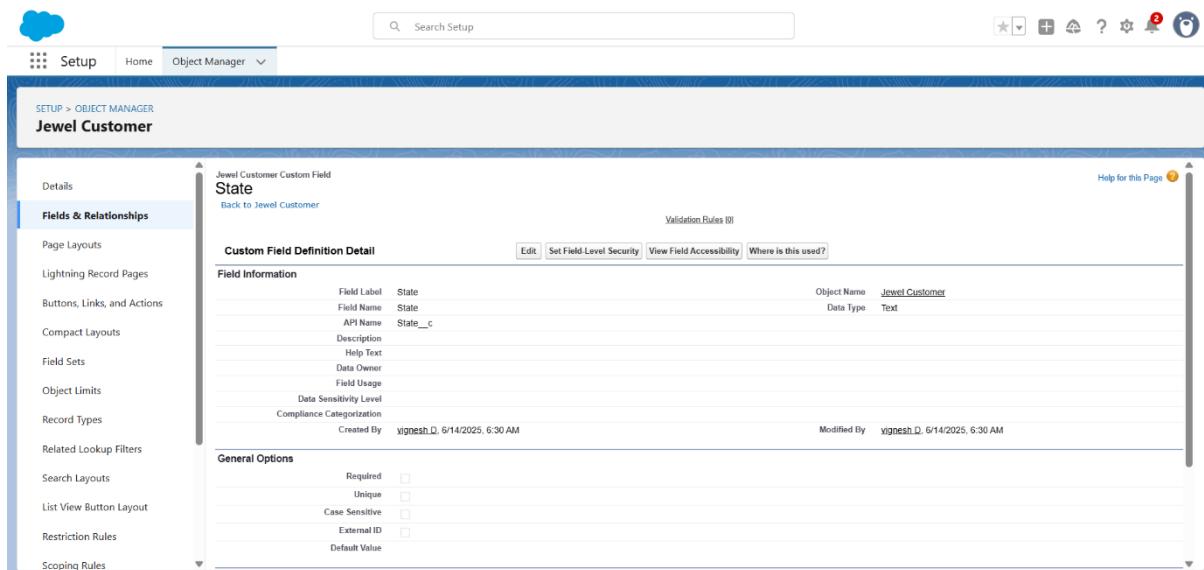


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## Creating Text Field in Jewel Customer Object

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



**Note:** create some text fields in jewel customer as:

Now click on “Fields & Relationships” >> New

Select Data type as “Text”.

Click on Next

Fill the above as following:

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

## **Creating Text Field in Jewel Customer Object**

Select Data type as “Text”.

Click on Next

Fill the above as following:

- o Field Label: Country
- o Length : 18
- o Field Name : gets auto generated
- o Click on Next >> Next >> Save and new.

## **Creating Text Field in Jewel Customer Object**

Select Data type as “Text”.

Click on Next

Fill the above as following:

- o Field Label: Zip/Postal code
- o Length : 6
- o Field Name : gets auto generated
- o Click on Next >> Next >> Save

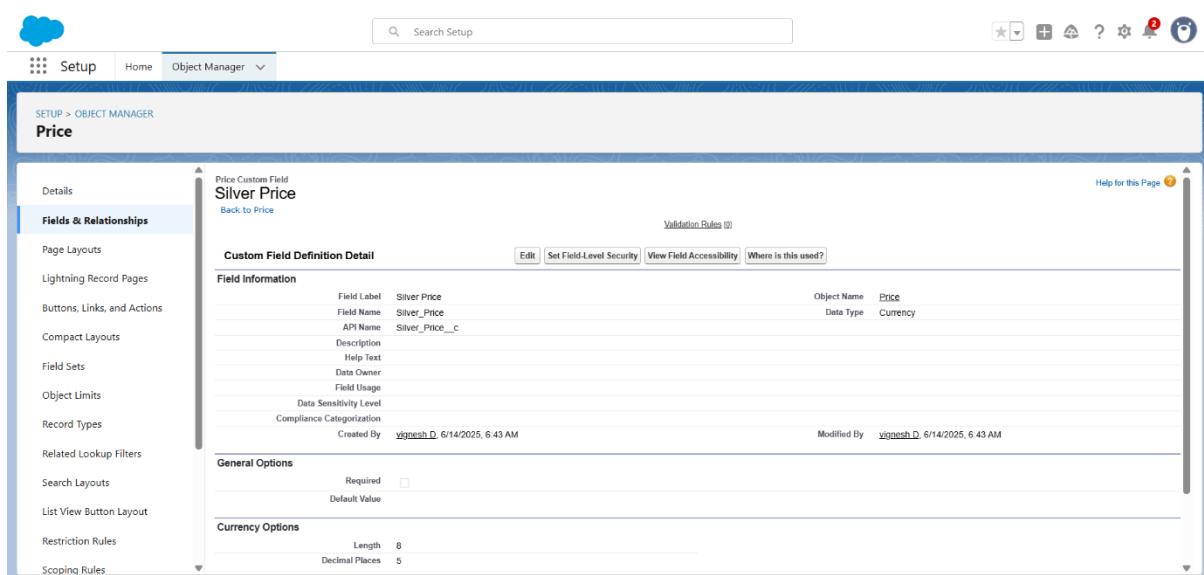
Field	Type	Length
Country	Country__c	Text(18)
Created By	CreatedById	Lookup(User)
Customer name	Name	Text(80)
Email	Email__c	Email
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Phone	Phone__c	Phone
State	State__c	Text(20)
Street	Street__c	Text(20)
Zip/Postal code	Zip_Postal_code__c	Text(6)

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



## Creating Lookup Relationship

1. Go to the setup page >> click on object manager >> type object name (Item) 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 Name” and click Next.
6. Next >> Next >> Save.

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The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Item Custom Field Customer Name'. It shows the 'Custom Field Definition Detail' page with the following details:

- Field Information:**
  - Field Label: Customer Name
  - Field Name: Customer\_Name
  - API Name: Customer\_Name\_c
  - Description: (empty)
  - Help Text: (empty)
  - Data Owner: (empty)
  - Field Usage: (empty)
  - Data Sensitivity Level: (empty)
  - Compliance Categorization: (empty)
  - Created By: vignesh\_D, 6/14/2025, 6:45 AM
  - Modified By: vignesh\_D, 6/14/2025, 6:45 AM
- Lookup Options:**
  - Related To: Jewel Customer
  - Related List Label: Items
  - Required:
  - What to do if the lookup record is deleted? Clear the value of this field.
- Lookup Filter:** (This section is collapsed)

**Note:** create some text fields in item object as:

## Creating Text 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 “Text”.
4. Click on Next
5. Fill the above as following:
  - o Field Label: Ornament
  - o Length : 20
  - o Field Name : gets auto generated
  - o Click on Next >> Next >> Save and new.

## 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.

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4. Given the Field Label as “ Weight ” and length as “ 8 ” , Decimal as “5”.

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 “ Stone Weight ” and length as “ 5 ” , Decimal as “5”.

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 “ Percentage” and length as “ 2 ” , Decimal as “ 0 ”.

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 “Currency” and click Next.

4. Given the Field Label as “ Stone/Other Price” and length as “ 8 ” , Decimal as “ 2 ”.

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

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## **Creating 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 “Expected Days Of Return”.
5. In values select “Enter values (1-3 Days, 4-5 Days, 6-7 Days, 8-10 Days), with each value separated by a new line” and enter values as shown below.
6. Click Next >> Next >> Next >> Save .

## **Creating 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 “Priority”.
5. In values select “Enter values (Low, Medium, High, Critical), with each value separated by a new line” and enter values as shown below.
6. Click Next >> Next >> Next >> Save .

## **Creating Formula 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 “Formula” and click Next.
4. Give Field Label and Field Name as “Silver Price” and select formula return type as “Number” and Decimal as “3” and click next.

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5. Under Advanced Formula write down the formula : (Prices\_\_r.Silver\_price\_\_c / 1000).

6. Click “Check Syntax” and Next >> Next >> Save & New.

## **Creating Formula Field in Item Object**

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

2. Now click on “Fields & Relationships” >> New.

3. Select Data type as “Formula” and click Next.

4. Give Field Label and Field Name as “Purity Gold Price” and select formula return type as “Currency” and Decimal as “ 2 ” and click next.

5. Under Advanced Formula write down the formula : ((Prices\_\_r.Gold\_price\_\_c \* Purity\_\_c ) / 24) / 10

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

## **Creating Formula Field in Item Object**

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

2. Now click on “Fields & Relationships” >> New.

3. Select Data type as “Formula” and click Next.

4. Give Field Label and Field Name as “Total Weight” and select formula return type as “Number” and Decimal as “ 3 ” and click next.

5. Under Advanced Formula write down the formula : (Weight\_\_c - Stone\_weight\_\_c)

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

## **Creating Formula Field in Item Object**

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

2. Now click on “Fields & Relationships” >> New.

3. Select Data type as “Formula” and click Next.

4. Give Field Label and Field Name as “Amount” and select formula return type as

# CRM Application for Jewel Manager

“Currency” and Decimal as “ 3 ” and click next.

5. Under Advanced Formula write down the formula : IF(ISPICKVAL( Item\_Type\_\_c , "Gold"), Total\_weight\_\_c \* Purity\_Gold\_price\_\_c , Total\_weight\_\_c \* Silver\_price\_\_c )
6. click “Check Syntax” and Next >> Next >> Save & New.

## **Creating Formula Field in Item Object**

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select Data type as “Formula” and click Next.
4. Give Field Label and Field Name as “KDM” and select formula return type as “Currency” and Decimal as “ 0 ” and click next.
5. Under Advanced Formula write down the formula :  

$$(Amount__c * Percentage__c) / 100$$
6. Click “Check Syntax” and Next >> Next >> Save & New.

## **Creating Formula Field in Item Object**

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select Data type as “Formula” and click Next.
4. Give Field Label and Field Name as “Making Charges” and select formula return type as “Currency” and Decimal as “ 0 ” and click next.
5. Under Advanced Formula write down the formula : IF(ISPICKVAL( Item\_Type\_\_c , "Gold"), Weight\_\_c \* 300 , Weight\_\_c \* 10 )
6. Click “Check Syntax” and Next >> Next >> Save & New.

**The fields are created as shown in the below image:**

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<https://orgfarm-b3ea050010-dev-ed.lightning.force.com/one/one.app#/setup/ObjectManager/01gK0000000X3/RecordTypes/view>

## Creating Picklist Field in Customer Order Object

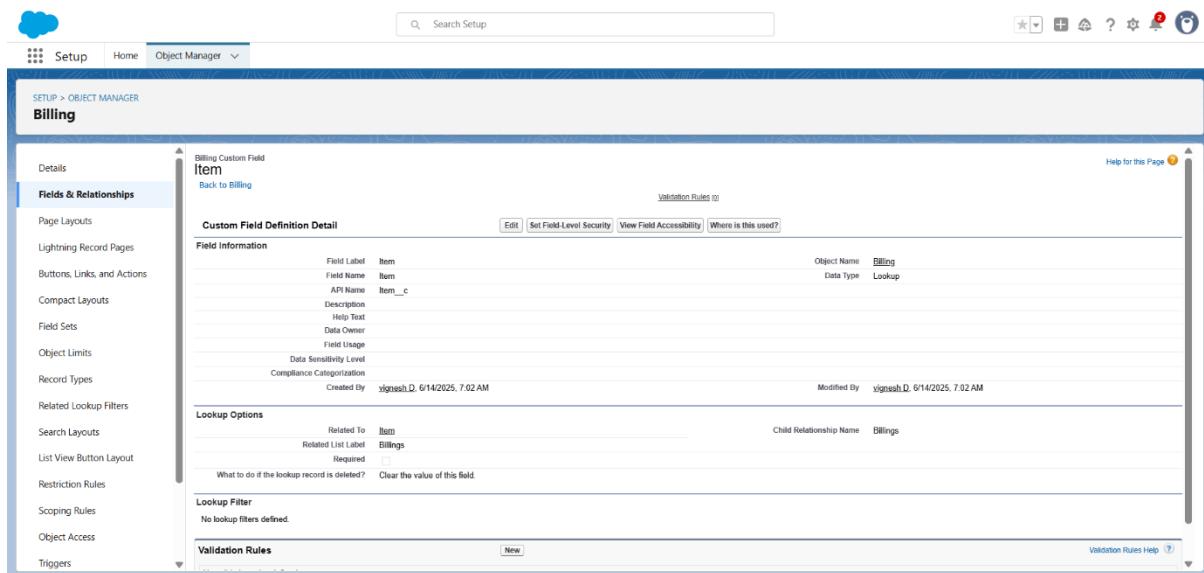
To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (**Customer Order**) 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 “Order Status”.
5. In values select “Enter values(Started, NotStarted, OnHold, Completed, Not Completed), with each value separated by a new line” and enter values as shown below.
6. Click Next >> Next >> Next >> Save

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## Creating Lookup Relationship

1. Go to the setup page >> click on object manager >> type object name (Billing) 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 “Item”.
5. Give Field Label as “Item” and click Next.
6. Next >> Next >> Save.



**Note:** create some fields in the billing object as:

### Creating Formula Field in Billing Object

1. Go to setup >> click on Object Manager >> type object name (Billing) 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 “Ornament” and select formula return type as “Text” and click next.
5. Under Advanced Formula write down the formula : Item\_\_r.Ornament\_\_c
6. Click “Check Syntax” and Next >> Next >> Save & New.

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## **Creating Formula Field in Billing Object**

1. Go to setup >> click on Object Manager >> type object name (Billing) 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 “Stone weight” and select formula return type as “Number” and Decimal as ” 2 ” and click next.
5. Under Advanced Formula write down the formula : Item\_\_r.Stone\_weight\_\_c
6. Click “Check Syntax” and Next >> Next >> Save & New.

## **Creating Formula Field in Billing Object**

1. Go to setup >> click on Object Manager >> type object name (Billing) 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 “Weight” and select formula return type as “Number” and Decimal as ” 2 ” and click next.
5. Under Advanced Formula write down the formula : Item\_\_r.Total\_weight\_\_c
6. click “Check Syntax” and Next >> Next >> Save & New.

## **Creating Formula Field in Billing Object**

1. Go to setup >> click on Object Manager >> type object name (Billing) 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 “Amount” and select formula return type as “Currency” and Decimal as ” 2 ” and click next.
5. Under Advanced Formula write down the formula : Item\_\_r.Amount\_\_c
6. click “Check Syntax” and Next >> Next >> Save & New.

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## **Creating Formula Field in Billing Object**

1. Go to setup >> click on Object Manager >> type object name (Billing) 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/Silver Price” and select formula return type as “Currency” and Decimal as “ 2 ” and click next.

5. Under Advanced Formula write down the formula :

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

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

## **Creating Formula Field in Billing Object**

1. Go to setup >> click on Object Manager >> type object name (Billing) 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 “KDM Charge” and select formula return type as “Currency” and Decimal as “ 0 ” and click next.

5. Under Advanced Formula write down the formula : Item\_\_r.KDM\_\_c

6. Click “Check Syntax” and Next >> Next >> Save & New.

## **Creating Formula Field in Billing Object**

1. Go to setup >> click on Object Manager >> type object name (Billing) 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 “Making Charges” and select formula return type as “Currency” and Decimal as “ 2 ” and click next.

5. Under Advanced Formula write down the formula : Item\_\_r.Making\_Charges\_\_c

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6. Click “Check Syntax” and Next >> Next >> Save & New.

## Creating Formula Field in Billing Object

1. Go to setup >> click on Object Manager >> type object name (Billing) 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 “Stones/other price” and select formula return type as “Currency” and Decimal as “ 2 ” and click next.

5. Under Advanced Formula write down the formula : Item\_\_r.Stone\_other\_price\_\_c

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

## Creating Formula Field in Billing Object

1. Go to setup >> click on Object Manager >> type object name (Billing) 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 “Total Amount” and select formula return type as “Currency” and Decimal as “ 0 ” and click next

5. Under Advanced Formula write down the formula : Amount\_\_c +

KDM\_Charge\_\_c + Stones\_other\_price\_\_c + Making\_Charges\_\_c

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

**The fields are created as shown in the below image:**

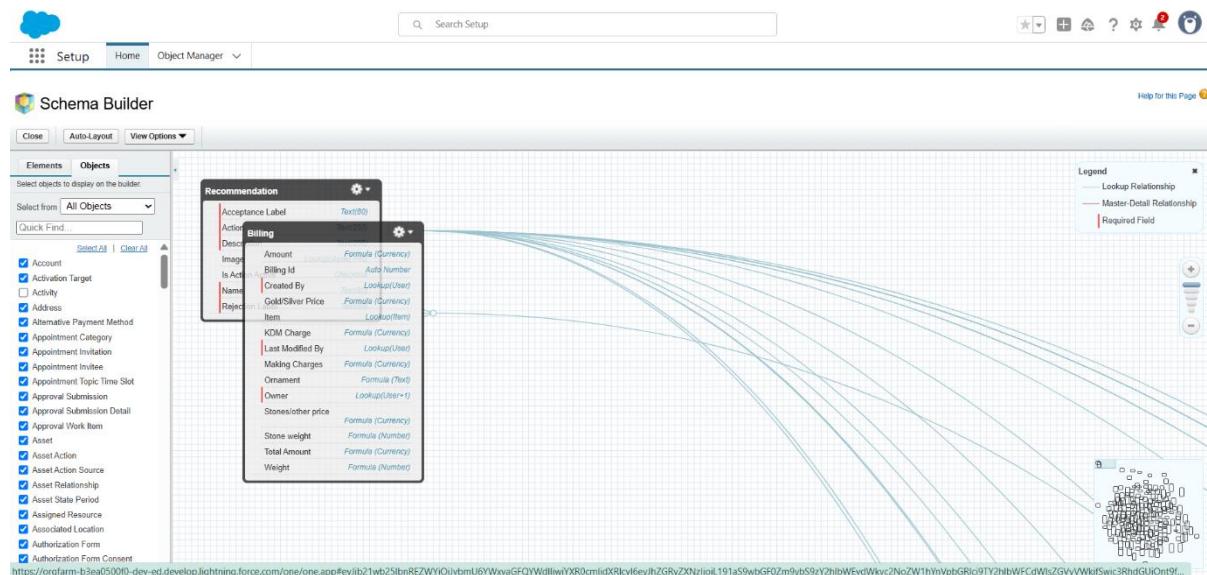
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		✓
Billing ID	Name	Auto Number		
Created By	CreatedBy	Lookup(Users)		
Gold/Silver Price	Gold_Silver_Price__c	Formula (Currency)		
Item	Item__c	Lookup(Item)		
KDM Charge	KDM_Charge__c	Formula (Currency)		
Last Modified By	LastModifiedBy	Lookup(Users)		
Making Charges	Making_Charges__c	Formula (Currency)		
Owner	Owner	Formula (Text)		
Stone weight	Stone_weight__c	Formula (Number)		✓
Stones/other price	Stones_other_price__c	Formula (Currency)		
Total Amount	Total_Amount__c	Formula (Currency)		
Weight	Weight__c	Formula (Number)		

# CRM Application for Jewel Manager Schema Builder

Schema Builder is a powerful tool within Salesforce that allows you to visualise, explore, and design the relationships between objects in your Salesforce organisation. It provides a graphical representation of the data model, making it easier to understand the structure and connections between different objects.

## Creating Schema Builder

1. Go to setup >> click on Object Manager >> Schema Builder.
2. Select objects >> Enter Objects as “Jewel Customer,Item,Customer Order, Price, Billing objects” in quick box and select them.



## Creating the Field Dependencies

### Use case:

Field Dependencies are used to create relationships between fields within an object.

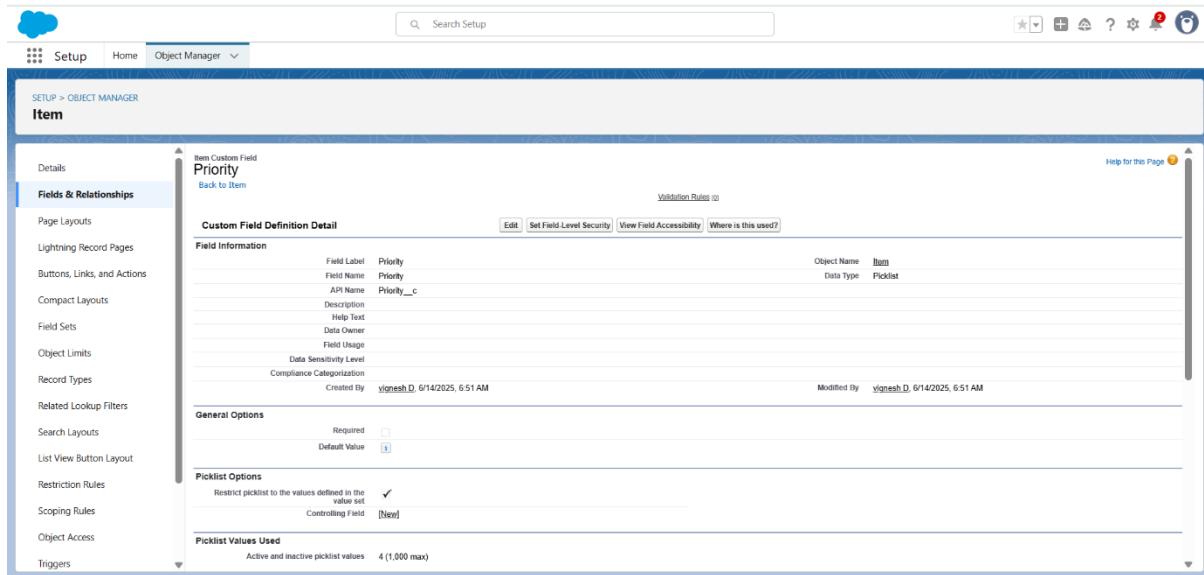
They allow you to control the visibility and availability of fields based on the values selected in other fields.

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

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4. Select Controlling Field as “Priority” and Depending field as “Expected Days of Return”? Continue.

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



## Creating the validation rule :

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

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

1. Go to setup >> click on Object Manager >> type object name (Jewel Customer ) in quick find bar >> click on the object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “Postal Code ”.
4. Insert the Error Condition Formula as :-

*AND(*

*OR(*

*LEN(Zip\_Postal\_code\_c) <> 6,*

*NOT(REGEX(Zip\_Postal\_code\_c, "^[0-9]{6}\$"))*

*),*

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*NOT(ISBLANK(Zip\_Postal\_code\_\_c))*

)

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

**NOTE:**Create One more Validation rule for Jewel Customer object.

- Enter Rule name as “ValidationRule For JewelCustomerObject ”.

- Insert the Error Condition Formula as :-

*OR( ISBLANK( City\_\_c ), ISBLANK( Country\_\_c ),ISBLANK( Phone\_\_c ),ISBLANK( State\_\_c ),ISBLANK( Street\_\_c ) )*

- Enter the Error Message as “Please fill Required fields”, select the Error location as

Top of Page and click Save.

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Create Validation rule for Item object.

1. Enter Rule name as “ValidationRule For Item”.

2. Insert the Error Condition Formula as :-

```
OR( ISBLANK( Amount__c ),  
ISBLANK( Customer_Name__c ),ISBLANK(  
Gold_price__c ),ISBLANK( KDM__c ),ISBLANK(  
Ornament__c ),ISBLANK( Percentage__c  
,ISBLANK( Making_Charges__c ),ISBLANK(  
Prices__c ),ISBLANK( Stone_weight__c  
,ISBLANK( Silver_price__c ),ISBLANK(  
Stone_other_price__c ),ISBLANK(  
Stone_weight__c ),ISBLANK( Weight__c ))
```

3. Enter the Error Message as “Please fill Required fields”, select the Error location as Top of Page and click Save.

The screenshot shows the Salesforce Object Manager interface for creating a new validation rule. The left sidebar lists various object settings like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "Item Validation Rule" under "Item". The "Validation Rule Detail" section contains the following information:

- Rule Name:** ValidationRule\_For\_Item
- Error Condition Formula:** OR( ISBLANK( Amount\_\_c ), ISBLANK( Customer\_Name\_\_c ), ISBLANK( Gold\_Price\_\_c ), ISBLANK( KDM\_\_c ), ISBLANK( Ornament\_\_c ), ISBLANK( Percentage\_\_c ), ISBLANK( Making\_Charges\_\_c ), ISBLANK( Prices\_\_c ), ISBLANK( Stone\_Weight\_\_c ), ISBLANK( Silver\_Price\_\_c ), ISBLANK( Stone\_Other\_Price\_\_c ), ISBLANK( Stone\_Weight\_\_c ), ISBLANK( Weight\_\_c ) )
- Error Message:** Please fill Required fields
- Description:** (empty)
- Created By:** vignesh D. 6/14/2025, 7:21 AM
- Modified By:** vignesh D. 6/14/2025, 7:21 AM

The "Active" checkbox is checked. The "Error Location" is set to "Top of Page".

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## MILESTONE-6

### Profiles

#### 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 Profiles page. The profile 'Gold Smith' is selected. The 'Profile Detail' section shows the profile's name, user license (Salesforce), and creation details. The 'Page Layouts' section lists various standard object layouts and their assignments. The 'Custom Object Permissions' section is visible at the bottom of the page.

#### 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.

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The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The 'Worker' profile is displayed, which is assigned to the 'Salesforce Platform' user license. The 'Page Layouts' section lists assignments for various objects:

Object	Layout	Description
Global	Global Layout [View Assignment]	
Email Application	Not Assigned [View Assignment]	
Home Page Layout	Home Page Default [View Assignment]	
Account	Account Layout [View Assignment]	
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	
Appointment Invitation	Appointment Invitation Layout [View Assignment]	
Asset	Asset Layout [View Assignment]	
Asset Relationship	Asset Relationship Layout [View Assignment]	
Lead	Lead Layout [View Assignment]	
Location	Location Layout [View Assignment]	
Location Group	Location Group Layout [View Assignment]	
Location Group Assignment	Location Group Assignment Layout [View Assignment]	
Object Milestone	Object Milestone Layout [View Assignment]	
Operating Hours	Operating Hours Layout [View Assignment]	
Order	Order Layout [View Assignment]	
Order Product	Order Product Layout [View Assignment]	

# CRM Application for Jewel Manager

## MILESTONE-7

### Roles

#### 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.

The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. The 'Role Detail' section displays the following information:

- Role:** Gold Smith
- Label:** Gold Smith
- This role reports to:** None
- Modified By:** jgoyalsh\_0 8/14/2025, 7:27 AM
- Opportunity Access:** Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
- Case Access:** Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases
- Role Name as displayed on reports:** Gold\_Smith
- Sharing Groups:** Role, Role and Internal Subordinates

The 'Users in Gold Smith Role' section lists two users:

Action	Full Name	Alias	Username	Active
Edit	Niklaus Mikaelson	nmika	niklaus@mkika.com	✓
Edit	Charan Kumar	ckuma	charan@ckuma.com	✓

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

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 () reports. Then click on Save.

The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. The 'Role Detail' section displays the following information:

- Role:** Worker
- Label:** Worker
- This role reports to:** Gold\_Smith
- Modified By:** jgoyalsh\_0 8/14/2025, 7:27 AM
- Opportunity Access:** Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
- Case Access:** Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases
- Role Name as displayed on reports:** Worker
- Sharing Groups:** None, Role and Internal Subordinates

The 'Users in Worker Role' section lists one user:

Action	Full Name	Alias	Username	Active
Edit	Gautam Patel	gautam	gautam@patel.com	✓

# CRM Application for Jewel Manager

## MILESTONE-8

### Users

#### 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
10. Save.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A search bar at the top is empty. On the left, a sidebar lists categories like 'Permission Set Groups', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users' (which is currently selected). Below the sidebar, a message says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'User' and shows 'Niklaus Mikaelson'. It includes tabs for 'Permission Set Assignments', 'Activation Required', 'Assignment', 'License', 'Groups', 'Public Group Membership', 'Queue Membership', 'Team', 'Managers in the Role Hierarchy', 'OAuth Apps', 'Third-Party Account Links', 'Installed Mobile Apps', 'Authentication Settings for External Systems', 'Log History', and 'User Provisioning Accounts'. The 'User Detail' section contains fields for Name (Niklaus Mikaelson), Alias (nrmka), Email (bob05103@gmail.com), Username (niklaus@nrmka.com), Nickname (nicky), Title, Company, Department, Division, Address, Time Zone (GMT-07:00 Pacific Daylight Time (America/Los\_Angeles)), Locale (English (United States)), Language (English), Delegated Approver, Manager, and 'Receive Approval Request Emails' (Only if I am an approver). There are also sections for 'Federation ID', 'App Registration: One-Time Password', 'App Registration: Salesforce Authenticator', and 'Security Key (2DF or WebAuthn)'. A large number of checkboxes for various user roles and system settings are listed on the right, many of which are checked. At the bottom, there are links for 'Uninstall | Edit'.

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## 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 : Kol
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 : Worker
8. User licence : Salesforce Platform
9. Profiles : Worker

3. Save.

**Note:** Create One more users as mentioned in activity 2 using the same profile.

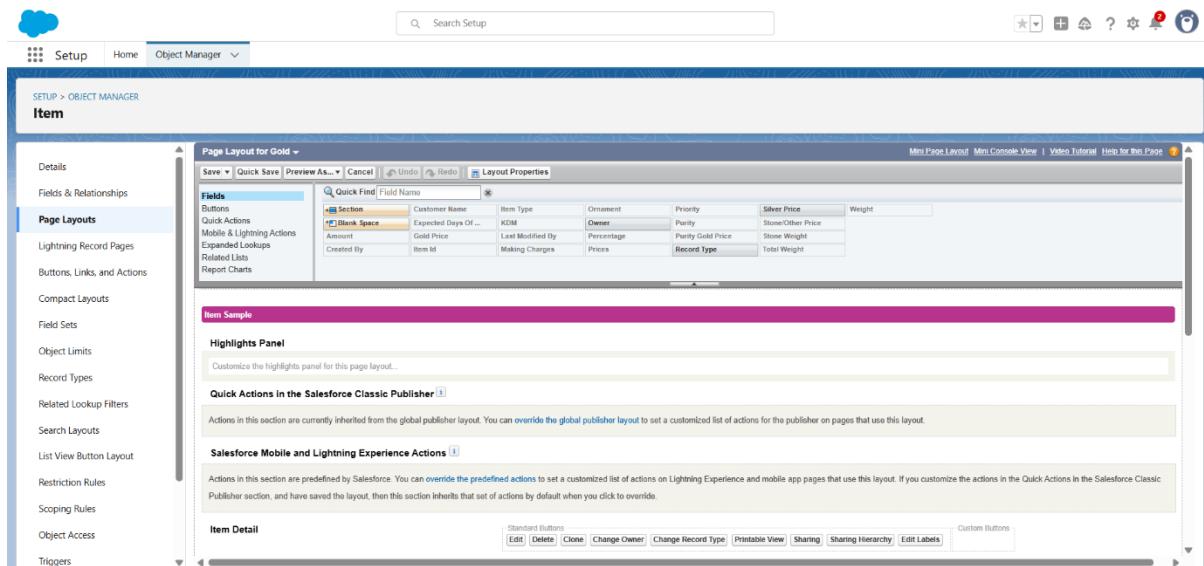
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## MILESTONE-9

### Page Layouts

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.
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.



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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.

The screenshot shows the Salesforce Setup interface for creating a new Page Layout. The left sidebar is collapsed, and the main area shows the 'Page Layouts' tab selected under 'Item'. The 'Fields' section is active, displaying a grid of fields. Some fields are highlighted in orange, such as 'Section', 'Expected Days Of...', 'Owner', 'Parity', 'Amount', 'Gold Price', 'Last Modified By', 'Percentage', 'Parity Gold Price', 'Created By', 'Item Id', 'Making Charges', 'Prices', 'Record Type', and 'Total Weight'. The 'Buttons' section is also visible. Below the grid, there are sections for 'Item Sample', 'Highlights Panel', 'Quick Actions in the Salesforce Classic Publisher', and 'Salesforce Mobile and Lightning Experience Actions'. At the bottom, there are standard buttons for Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, and Edit Labels.

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## MILESTONE-10

### Record Types

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 & 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 Object Manager interface. The left sidebar has a 'Record Types' section selected. The main area displays a record for 'Gold'. The record details are as follows:

- Record Type Label:** Gold
- Record Type Name:** Gold
- Namespace Prefix:** (empty)
- Description:** Gold Items Information
- Created By:** vignesh D (with timestamp 6/14/2025, 7:51 AM)
- Active:** checked
- Modified By:** vignesh D (with timestamp 6/14/2025, 7:51 AM)

Below the record details, there is a table titled 'Picklists Available for Editing' with three entries:

Action	Field	Modified Date
Edit	Expected Days Of Return	6/14/2025, 7:51 AM
Edit	Item Type	6/14/2025, 7:51 AM
Edit	Priority	6/14/2025, 7:51 AM

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**Note:** Create another Record Type with name “Silver” following the steps from Activity1

( Use page layout for Silver).

The screenshot shows the Salesforce Setup interface under the Object Manager section. A new Record Type named "Silver" has been created for the "Item" object. The details shown include:

- Record Type Label:** Silver
- Record Type Name:** Silver
- Namespace Prefix:** None
- Description:** Silver Items Information
- Created By:** vignesh D. (vignesh D. / 6/14/2025, 7:54 AM)
- Modified By:** vignesh D. (vignesh D. / 6/14/2025, 7:54 AM)
- Status:** Active (checkmark)

The "Picklists Available for Editing" section lists three fields:

Action	Field	Modified Date
Edit	Expected Days Of Return	6/14/2025, 7:54 AM
Edit	Item Type	6/14/2025, 7:54 AM
Edit	Priority	6/14/2025, 7:54 AM

The left sidebar shows the navigation path: SETUP > OBJECT MANAGER > Item > Record Types.

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## MILESTONE-11

### Permission Sets

#### Creating permission set

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

1. Go to setup >> type “permission sets” in quick search >> select permission sets >> New.
2. Enter the label name as “Per to Worker”, API will be auto populated >> save.
3. Under Apps Select object settings.
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.

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

- Setup Tab:** The user is in the 'Permission Sets' section under the 'Users' category.
- Permission Set Overview:**
  - API Name:** Per\_to\_Worker
  - Description:** Not explicitly provided.
  - License:** Not explicitly provided.
  - Session Activation Required:** Unchecked.
  - Permission Set Groups Added To:** 0
  - Created By:** vijayash.D / 6/14/2025, 7:55 AM
  - Last Modified By:** vijayash.D / 6/14/2025, 7:57 AM
- Assigned Apps:**
  - Assigned Apps:** Settings that specify which apps are visible in the app menu.
  - Assigned Connected Apps:** Settings that specify which connected apps are visible in the app menu.
  - Object Settings:** Permissions to access objects and fields, and settings such as tab availability.
  - App Permissions:** Permissions to perform app-specific actions, such as "Manage Call Centers".
  - Apex Class Access:** Permissions to execute Apex classes.
  - Visualforce Page Access:** Permissions to execute Visualforce pages.
  - External Data Source Access:** Permissions to authenticate against external data sources.
  - Flow Access:** Permissions to execute Flows.

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## MILESTONE-12

### Trigger

**NOTE : create “Paid Amount”, “Paying Amount “ fields before create trigger.**

#### **Creating Currency(Paid Amount) Field in Billing Object**

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Billing) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select Data type as “Currency” and click Next.
4. Enter Field Label as “ Paid Amount” and length as “ 18 ”and decimal” 0 “.Field name will be auto generated.
5. Click Next >> Next >> Next >> Save .

#### **Creating Formula(Paying Amount) Field in Billing Object**

1. Go to setup >> click on Object Manager >> type object name (Billing) 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 “Paying Amount” and select formula return type as “Currency” and Decimal as ” 2 ” and click next.
5. Under Advanced Formula write down the formula : Total\_Amount\_\_c - Paid\_Amount\_\_c
6. click “Check Syntax” and Next >> Next >> Save & New.

# CRM Application for Jewel Manager

## Create a Trigger Handler class

### Trigger handler:

A trigger handler is a design pattern that organises trigger logic into separate classes.

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

1. Click the Gear icon >> click on Developer Console >> File>>New >>Apex class.
2. Give name for your new Apex class as “UpdatePaidAmountTriggerHandler >>”ok”.
3. Paste the code given below.

### 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;
        }
    }
}
```

# CRM Application for Jewel Manager

## Create the trigger :

1. Click the Gear icon >> click on Developer Console >> File>>New >>Apex Trigger.
2. Give name for your new Apex class as “UpdatePaidAmountTrigger >>”ok”.
3. Paste the code given below.

## 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);  
    }  
}
```

# CRM Application for Jewel Manager

## MILESTONE-13

### User Adoption

#### Create a Record (Jewel Customer)

1. Click on App Launcher on the left side of the screen.
2. Search Jewelry Inventory System & click on it.
3. Click on Drop Down and Click on the Jewel Customer tab.
4. Click New.
5. Fill the Details and click on Save.

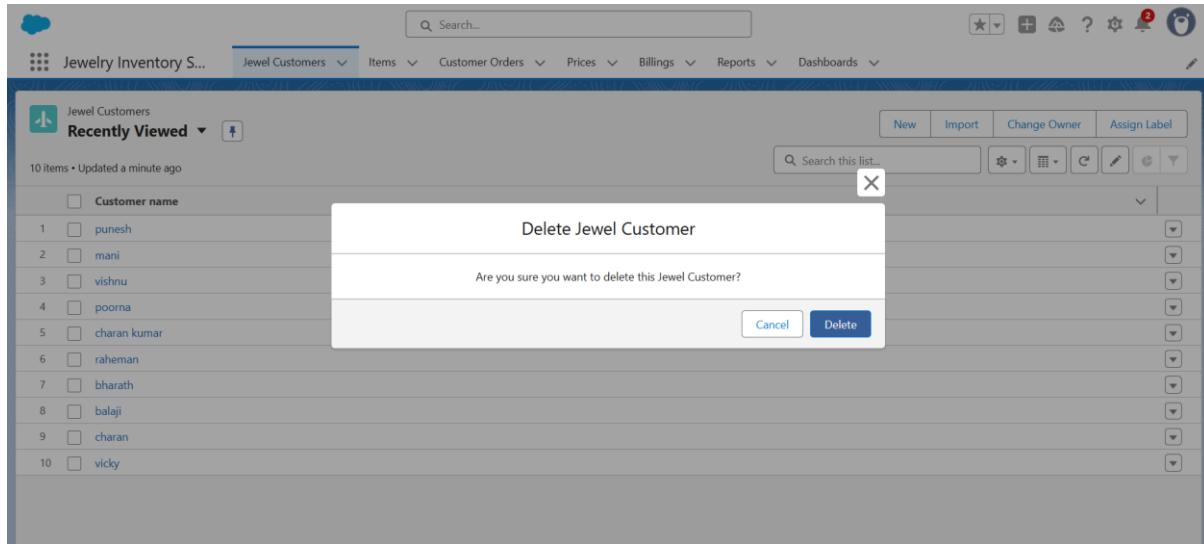
#### View a Record (Jewel Customer)

1. Click on App Launcher on the left side of the screen.
2. Search Jewelry Inventory System & click on it.
3. Click on the Jewel Customer Tab.
4. Click on any record name. you can see the details of the Jewel Customer.

# CRM Application for Jewel Manager

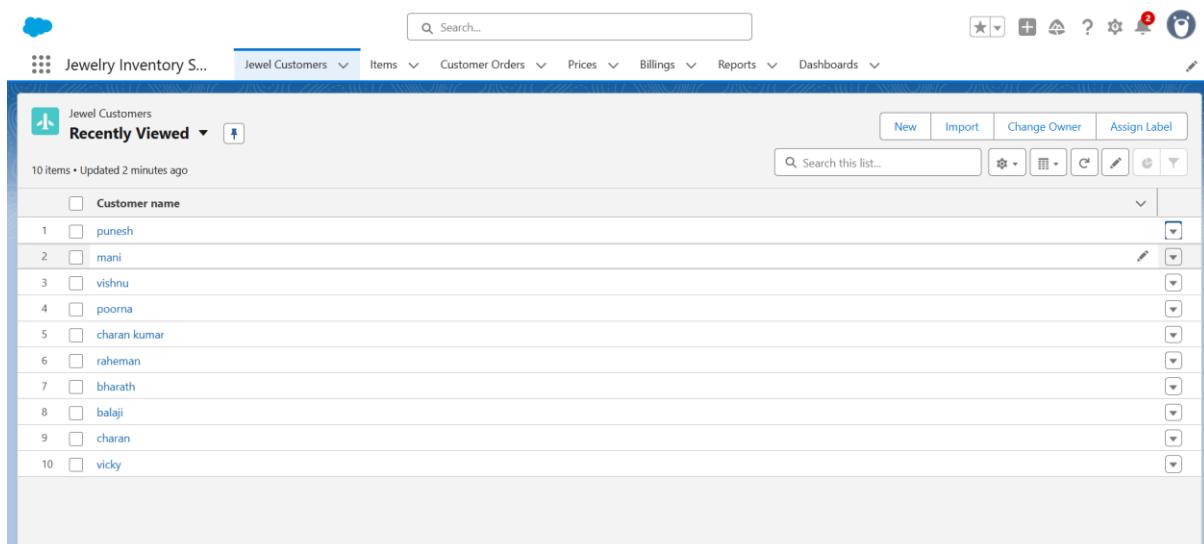
## Delete a Record (Jewel Customer)

1. Click on App Launcher on the left side of the screen.
2. Search Jewelry Inventory System & click on it.
3. Click on the Jewel Customer Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete.



**Note:** Create at least 10 records for each of the objects: Jewel Customer ,Price ,Item,

## Customer Order and Billing.



# CRM Application for Jewel Manager

**Items**

Recently Viewed ▾

10 items • Updated a few seconds ago

	Item Id
1	Item-10
2	Item-09
3	Item-08
4	Item-07
5	Item-06
6	Item-05
7	Item-04
8	Item-03
9	Item-02
10	Item-01

New Import Change Owner Assign Label

Search this list...

**Customer Orders**

Recently Viewed ▾

10 items • Updated a few seconds ago

	Customer Order Id
1	Customer Order-10
2	Customer Order-09
3	Customer Order-08
4	Customer Order-07
5	Customer Order-06
6	Customer Order-05
7	Customer Order-04
8	Customer Order-03
9	Customer Order-02
10	Customer Order-01

New Import Assign Label

Search this list...

**Prices**

Recently Viewed ▾

10 items • Updated a few seconds ago

	Price Id
1	Price-10
2	Price-09
3	Price-08
4	Price-07
5	Price-06
6	Price-05
7	Price-04
8	Price-03
9	Price-02
10	Price-01

New Import Change Owner Assign Label

Search this list...

**Billings**

Recently Viewed ▾

10 items • Updated a few seconds ago

	Billing Id
1	Billing-10
2	Billing-09
3	Billing-08
4	Billing-07
5	Billing-06
6	Billing-05
7	Billing-04
8	Billing-03
9	Billing-02
10	Billing-01

New Import Change Owner Assign Label

Search this list...

# CRM Application for Jewel Manager

## MILESTONE-14

### Reports

#### Create Report

1. Go to the app >> click on the reports tab.
2. Click New Report.
3. Select report type (New prices report) from category or from report type panel or from search panel >> click on start report.
4. Customise your report
  - Add fields from the left pane as shown below.
5. Save or run it.

	Price: Price Id	Gold Price	Silver Price
1	Price-01	\$110.00000	\$100.00000
2	Price-10	\$1,000.00000	\$1,000.00000
3	Price-07	\$600.00000	\$600.00000
4	Price-02	\$100.00000	\$100.00000
5	Price-03	\$200.00000	\$200.00000
6	Price-04	\$300.00000	\$300.00000
7	Price-05	\$400.00000	\$400.00000
8	Price-06	\$500.00000	\$500.00000
9	Price-08	\$700.00000	\$700.00000
10	Price-09	\$900.00000	\$900.00000
11		\$4,810.00000	\$4,800.00000

**Note:** create two more reports like New Prices Report, New Report

	Price: Price Id	Gold Price	Silver Price
1	Price-01	\$110.00000	\$100.00000
2	Price-10	\$1,000.00000	\$1,000.00000
3	Price-07	\$600.00000	\$600.00000
4	Price-02	\$100.00000	\$100.00000
5	Price-03	\$200.00000	\$200.00000
6	Price-04	\$300.00000	\$300.00000
7	Price-05	\$400.00000	\$400.00000
8	Price-06	\$500.00000	\$500.00000
9	Price-08	\$700.00000	\$700.00000
10	Price-09	\$900.00000	\$900.00000
11		\$4,810.00000	\$4,800.00000

# CRM Application for Jewel Manager

The screenshot shows a report titled "Items with Customer Orders and Customer". The report preview displays the following data:

Item: Item Id	Customer Order: Customer Order Id	Customer: Customer name
1 Item-04	Customer Order-04	poorna
2 Item-07	Customer Order-07	vicky
3 Item-01	Customer Order-01	punesh
4 Item-06	Customer Order-06	charan
5 Item-05	Customer Order-05	charan kumar
6 Item-10	Customer Order-10	raheman
7 Item-09	Customer Order-09	balaji
8 Item-08	Customer Order-08	bharath
9 Item-03	Customer Order-03	vishnu
10 Item-02	Customer Order-02	mani

## MILESTONE-15

## Dashboards

### Create Dashboard

1. Go to the app >> click on the Dashboards tabs.
2. Give a Name as "Jewel Management" 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 dashboard titled "Dashboard 1" contains the following reports:

- New Report**: Displays a list of items with their corresponding customer orders and customer names.
- New Billings with Item Report**: Displays a list of billings with their item details.
- New Prices Report**: Displays a list of prices with their gold and silver price details.

Sample data from the reports:

Item: Item Id	Customer Order: Customer Order Id	Customer: Customer name
Item-01	Customer Order-01	punesh
Item-02	Customer Order-02	mani
Item-03	Customer Order-03	vishnu
Item-04	Customer Order-04	poorna
Item-05	Customer Order-05	charan kumar
Item-06	Customer Order-06	charan
Item-07	Customer Order-07	vicky

Billing: Billing Id	Item: Item Id
Billing-01	Item-01
Billing-02	Item-02
Billing-03	Item-03
Billing-04	Item-04
Billing-05	Item-05
Billing-06	Item-06
Billing-07	Item-07

Price: Price Id	Gold Price	Silver Price
Price-01	\$110.00000	\$100.00000
Price-02	\$100.00000	\$100.00000
Price-03	\$200.00000	\$200.00000
Price-04	\$300.00000	\$300.00000
Price-05	\$400.00000	\$400.00000
Price-06	\$500.00000	\$500.00000
Price-07	\$600.00000	\$600.00000

# CRM Application for Jewel Manager

## MILESTONE-16

### Flows

#### 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. Enter the API name as “ Email body”.
10. Change the view as Rich Text >> View to Plain Text.
11. In the body field paste the syntax that is given below.

Hello

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

Here are the details for the item you purchased with Jewelry Inventory System

Item Type: {!\$Record.Item\_\_r.Item\_Type\_\_c}

Ornament: {!\$Record.Ornament\_\_c}

Weight: {!\$Record.Weight\_\_c}grams

Amount: {!\$Record.Amount\_\_c}

12. Click done.

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

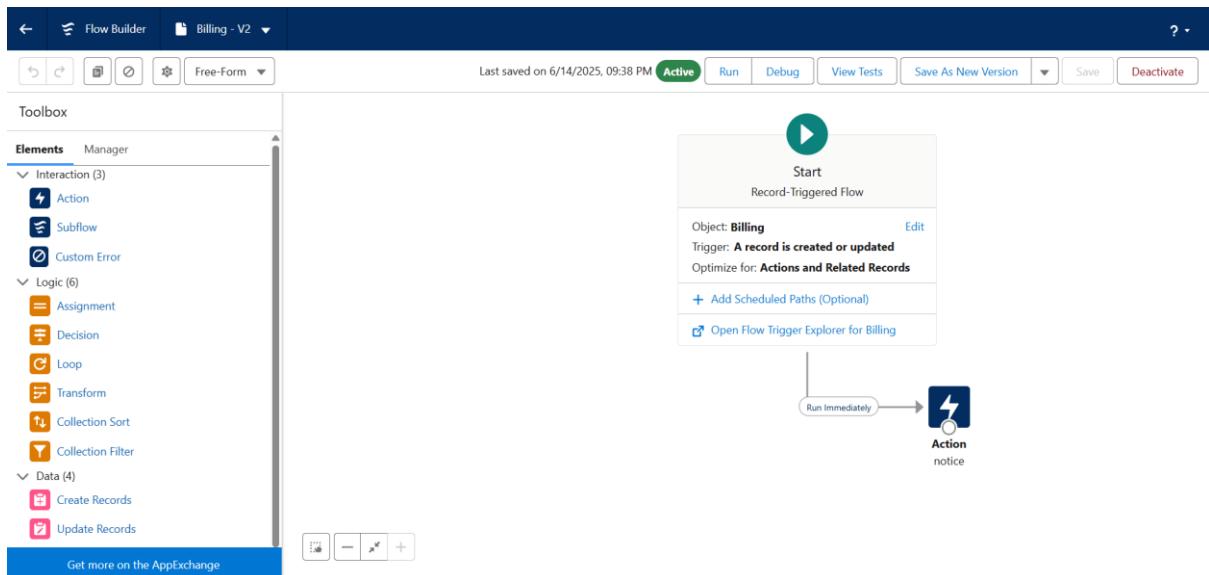
14. Their action bar will be opened in that search for “ send email ” and click on it.

15. Give the label name as “ notice”

16. API name will be auto populated.

# CRM Application for Jewel Manager

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



# CRM Application for Jewel Manager

Final output of Jewel Inventory System App Launcher

The CRM application interface shows three recently viewed lists:

- Jewel Customers** (List 1): A list of customer names. Item 1 (punesh) is selected.
- Items** (List 2): A list of item IDs. Item 10 (Item-10) is selected.
- Customer Orders** (List 3): A list of customer order IDs. Item 1 (Customer Order-10) is selected.

Each list includes a search bar, a toolbar with New, Import, Change Owner, and Assign Label buttons, and a detailed view section at the bottom.

List	Viewed Item
Jewel Customers	punesh
Items	Item-10
Customer Orders	Customer Order-10

# CRM Application for Jewel Manager

**Prices**

Recently Viewed ▾

10 items • Updated a few seconds ago

Price Id
1 Price-10
2 Price-09
3 Price-08
4 Price-07
5 Price-06
6 Price-05
7 Price-04
8 Price-03
9 Price-02
10 Price-01

**Billings**

Recently Viewed ▾

10 items • Updated a few seconds ago

Billing Id
1 Billing-10
2 Billing-09
3 Billing-08
4 Billing-07
5 Billing-06
6 Billing-05
7 Billing-04
8 Billing-03
9 Billing-02
10 Billing-01

**Reports**

Recent

4 items

Report Name	Description	Folder	Created By	Created On	Subscribed
New Report		Private Reports	vignesh D	6/14/2025, 8:52 AM	
New Prices Report		Private Reports	vignesh D	6/14/2025, 8:49 AM	
New Billings with Item Report		Private Reports	vignesh D	6/14/2025, 8:51 AM	
New Billings with Item Report		Private Reports	vignesh D	6/14/2025, 8:51 AM	

**Dashboard 1**

As of Jun 15, 2025, 3:34 AM | Viewing as vignesh D

**New Report**

Item, Item...	Customer Order, Customer Or...	Customer, Customer ...
Item-01	Customer Order-01	punesh
Item-02	Customer Order-02	manu
Item-03	Customer Order-03	vishnu
Item-04	Customer Order-04	poorna
Item-05	Customer Order-05	charan kumar
Item-06	Customer Order-06	charan
Item-07	Customer Order-07	vicky

**New Billings with Item Report**

Billing, Billing Id ↑	Item, Item Id
Billing-01	Item-01
Billing-02	Item-02
Billing-03	Item-03
Billing-04	Item-04
Billing-05	Item-05
Billing-06	Item-06
Billing-07	Item-07

**New Prices Report**

Price, Price Id ↑	Gold Price	Silver Price
Price-01	\$110 00000	\$100 00000
Price-02	\$100 00000	\$100 00000
Price-03	\$200 00000	\$200 00000
Price-04	\$300 00000	\$300 00000
Price-05	\$400 00000	\$400 00000
Price-06	\$500 00000	\$500 00000
Price-07	\$600 00000	\$600 00000