

## **CRM Application For Jewel Management**

### **CRM Application For Jewel Management**

#### **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>

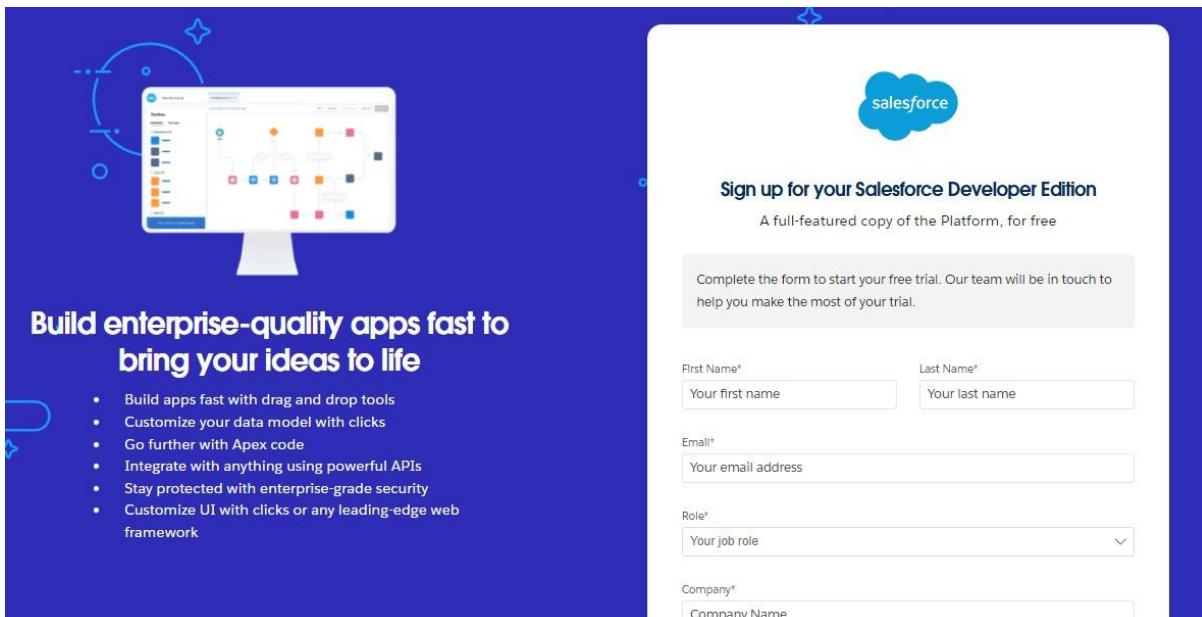
# CRM Application For Jewel Management

## 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 :

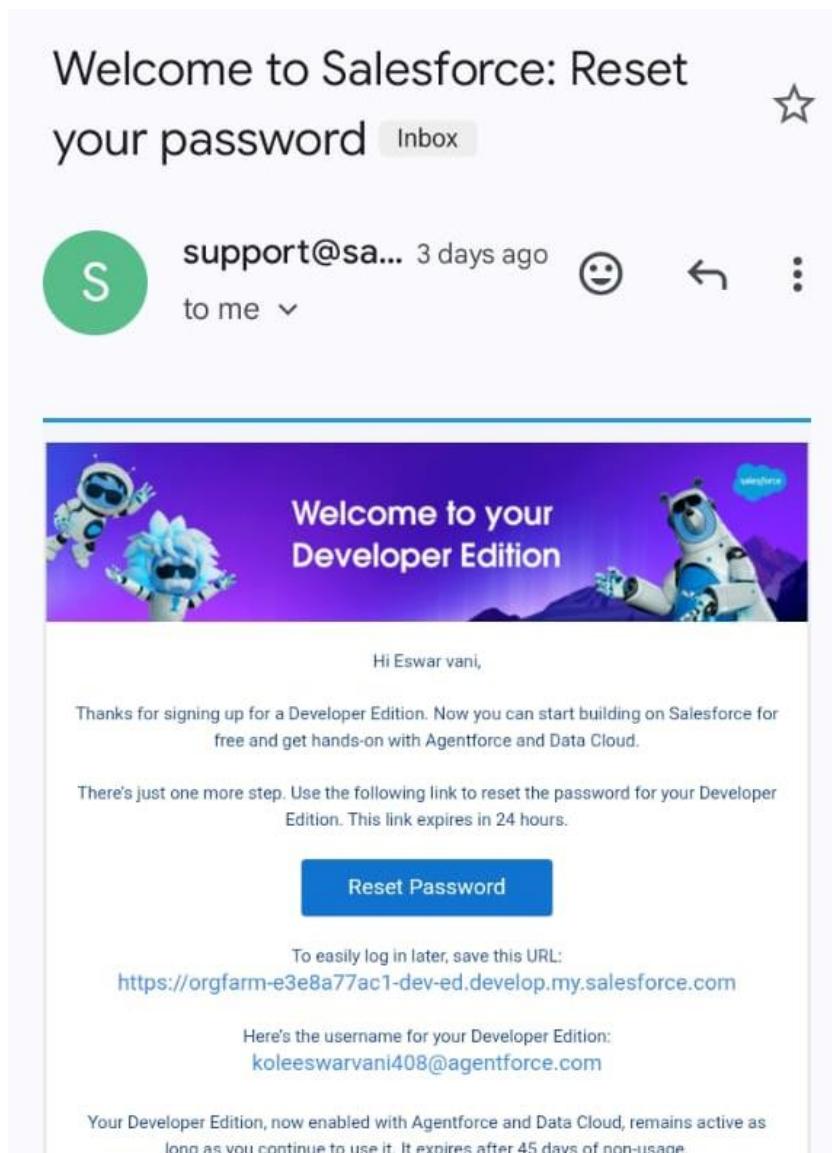


1. **First name** : Kole
2. **Last name** : Eswar vani
3. **Email** : [koleeswarvani@gmail.com](mailto:koleeswarvani@gmail.com)
4. **Role** : Developer
5. **Company** : Gayatri degree college-Tirupati
6. **County** : India
7. **Postal Code** : 517501
8. **Username** : [koleeswarvani408@agentforce.com](mailto:koleeswarvani408@agentforce.com)

## CRM Application For Jewel Management

### 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.

## CRM Application For Jewel Management

Change Your Password

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

- 8 characters
- 1 letter
- 1 number

\* New Password  
\*\*\*\*\*

\* Confirm New Password  
\*\*\*\*\*

Security Question  
In what city were you born?

\* Answer  
asdfghjkl

Change Password

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

Search Setup

Setup Home Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

SETUP Home

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

# CRM Application For Jewel Management

## MILESTONE-2

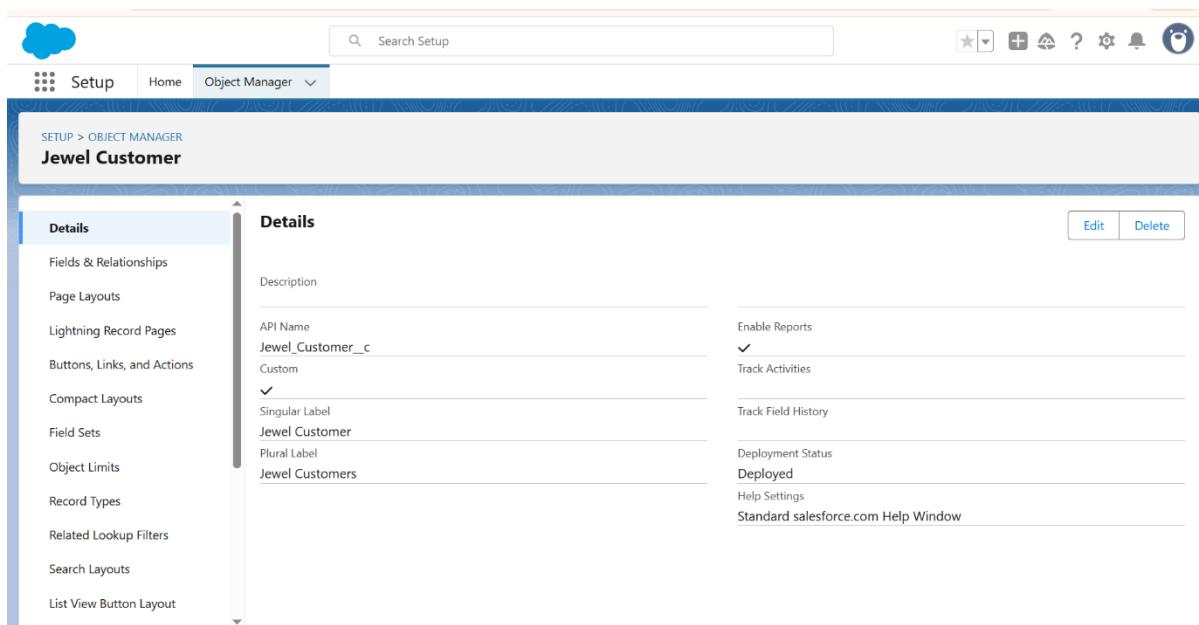
### Object

#### 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.



#### Create Item Object

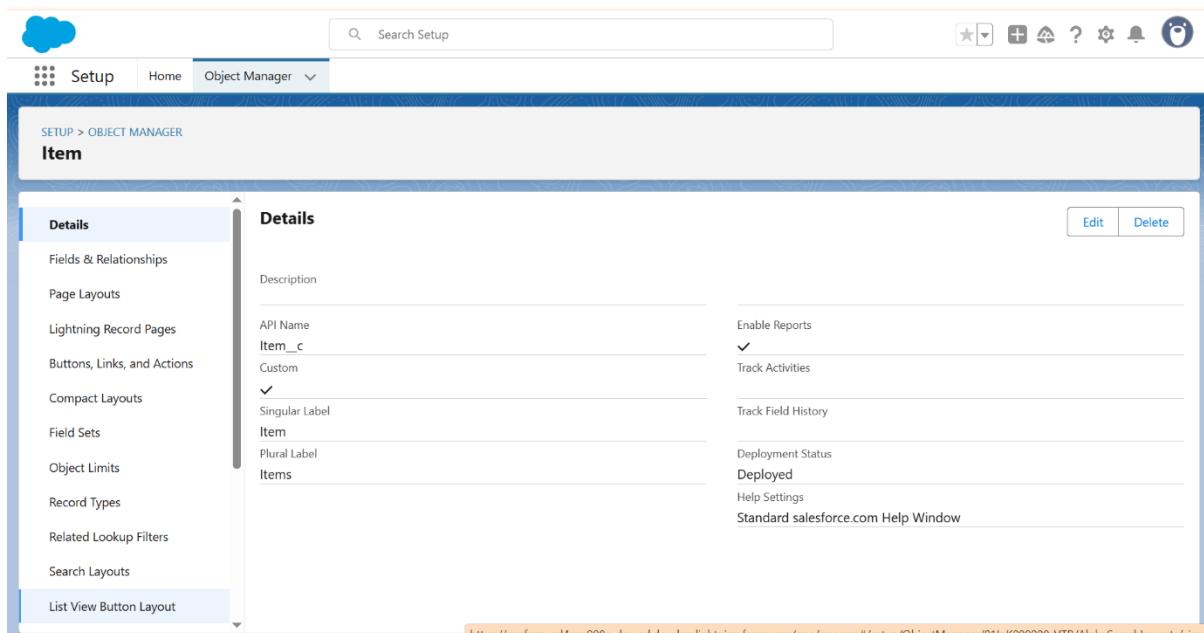
The purpose of creating a Item object is to manage the inventory of gold and silver items.

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

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



## Create Customer Order Object

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

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
  1. Enter the label name >> Customer Order
  2. Plural label name >> Customer Orders
  3. Enter Record Name Label and Format
    - Record Name >> Customer Order No
    - Data Type >> Auto Number
    - Display Format >> Order - {0000}
    - Starting Number >> 1
2. Click on Allow reports.
3. Allow search >> Save.

## CRM Application For Jewel Management

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with a cloud icon, 'Setup', 'Home', and 'Object Manager'. A search bar says 'Search Setup' with a magnifying glass icon. To the right are various icons for configuration, including a star, plus sign, question mark, gear, and bell.

The main area is titled 'Customer Order' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The 'Details' tab is selected. In the main pane, there's a 'Description' field and a 'Details' section containing fields for 'API Name' (set to 'Customer\_Order\_\_c'), 'Custom' (checked), 'Singular Label' (set to 'Customer Order'), 'Plural Label' (set to 'Customer Orders'), and other settings like 'Enable Reports' (checked), 'Track Activities', 'Track Field History', 'Deployment Status' (set to 'Deployed'), and 'Help Settings' (set to 'Standard salesforce.com Help Window').

### 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
    - Record Name >> Item Price
    - Data Type >> Text
2. Click on Allow reports.
3. Allow search >> Save.

# CRM Application For Jewel Management

The screenshot shows the Salesforce Setup interface. At the top, there's a blue header bar with the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons. Below the header, the main content area has a title "SETUP > OBJECT MANAGER" and a sub-title "Price". On the left, a sidebar lists various setup categories like "Fields & Relationships", "Page Layouts", and "Buttons, Links, and Actions". The main panel is titled "Details" and contains sections for "Description", "API Name" (set to "Price\_c"), "Custom", "Singular Label" (set to "Price"), and "Plural Label" (set to "Prices"). To the right of these are checkboxes for "Enable Reports" (checked), "Track Activities", "Track Field History", and "Deployment Status" (set to "Deployed"). At the bottom right of the main panel are "Edit" and "Delete" buttons.

## 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
    - Record Name >> Billing Name
    - Data Type >> Text
2. Click on Allow reports.
3. Allow search >> Save.

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The screenshot shows the Salesforce Object Manager interface for the 'Billing' object. The top navigation bar includes links for Setup, Home, and Object Manager. A search bar is present at the top right. The main content area displays the 'Details' tab for the Billing object. On the left, a sidebar lists various configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main panel shows the following details:

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

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

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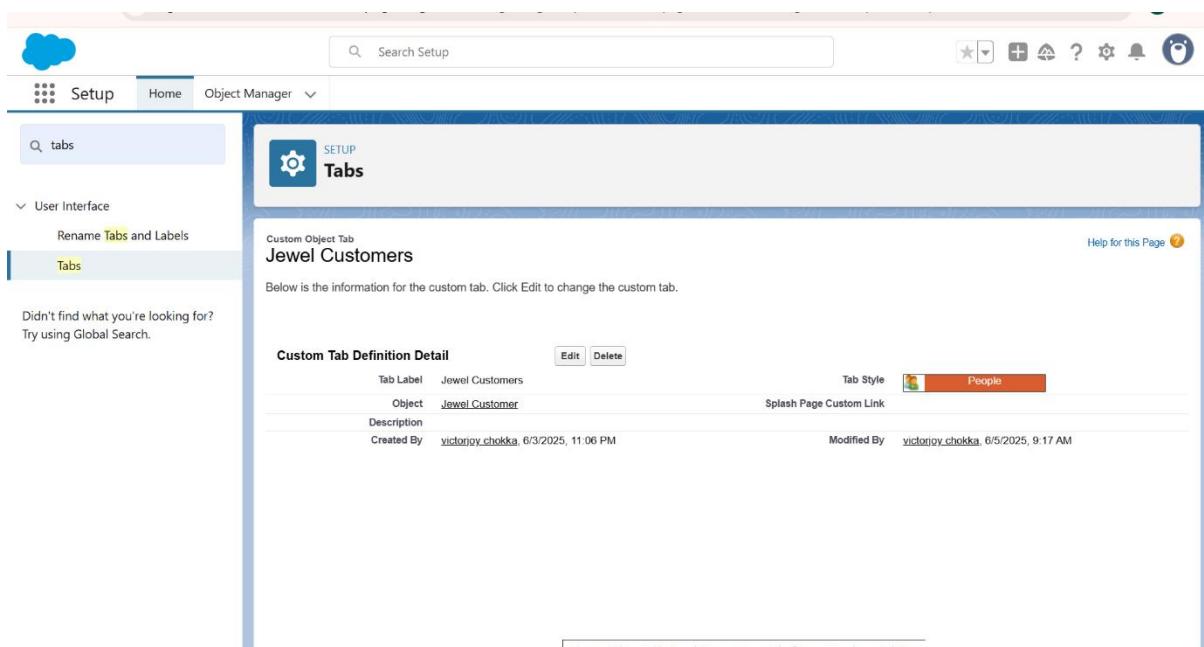
## MILESTONE-3

### 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.



#### To create a Tab:(Item)

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

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

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/setup/CustomTabs/home>. The page title is "Custom Tabs". The left sidebar shows "User Interface" and "Tabs" is selected. The main content area displays "Custom Object Tabs" and "Web Tabs".

**Custom Object Tabs**

Action	Label	Tab Style	Description
Edit   Del	Billings	Ticket	
Edit   Del	Customer Orders	Postage	
Edit   Del	Items	Box	
Edit   Del	Jewel Customers	People	
Edit   Del	Prices	Treasure chest	

**Web Tabs**

New	What Is This?
No Web Tabs have been defined	

## **CRM Application For Jewel Management**

### **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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Lightning App Builder App Settings

App Details & Branding

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



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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.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a cloud icon, a search bar labeled 'Search Setup', and various global buttons. The main header says 'SETUP > OBJECT MANAGER' and 'Jewel Customer'. On the left, a sidebar lists various setup options like Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, etc. The main content area shows the 'Customer' field definition. It has a 'Field Information' section with details: Field Label: Customer, Field Name: Customer, API Name: Customer\_\_c, Description: Help Text, Data Owner: [redacted]. Below this is a note: 'Jewel Customer Custom Field: Customer ~ Salesforce - Developer Edition'. There's also a 'Data Sensitivity Level' section. The 'Compliance Categorization' section shows 'Created By: victorjoy\_chokka, 6/5/2025, 8:55 PM' and 'Modified By: victorjoy\_chokka, 6/5/2025, 8:55 PM'. The 'Lookup Options' section shows 'Related To: Jewel Customer', 'Related List Label: Jewel Customers', and 'Required: [checkbox]'. At the bottom, there's a note: 'What to do if the lookup record Clear the value of this field.'

#### Creating a Master-Detail Relationship

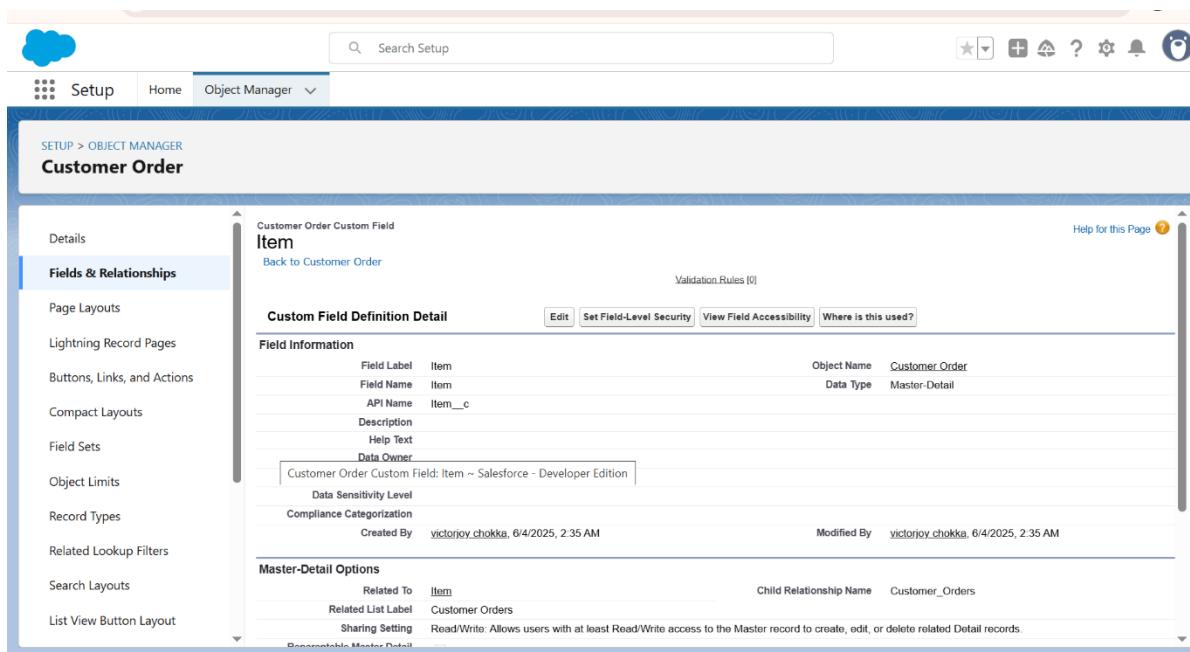
Master-detail relationship is a type of relationship between two objects where the master object controls certain behaviours and settings of the detail object. Here are a few use cases that demonstrate the use of master-detail relationships

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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.



### 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.

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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.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes a cloud icon, 'Setup', 'Home', 'Object Manager', and various global buttons. The main title is 'SETUP > OBJECT MANAGER' followed by 'Jewel Customer'. On the left, a sidebar lists options like 'Details', 'Fields & Relationships' (which is selected), and other layout-related items. The right pane displays the 'Custom Field Definition Detail' for a field named 'City'. The 'Field Information' section shows the field label as 'City', field name as 'City', API name as 'City\_\_c', and data type as 'Text'. It also shows the object name as 'Jewel Customer' and the created and modified by user as 'victorjoy.chokka'. The 'General Options' section includes checkboxes for 'Required', 'Unique', and 'Case Sensitive'.

### Creating the Phone field in object Jewel Customer

To create fields in an object:

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

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The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'FIELDS & RELATIONSHIPS' under 'Jewel Customer'. The main area displays the 'Custom Field Definition Detail' for a field named 'Phone'. The field information includes:

Field Label	Phone	Object Name	Jewel_Customer
Field Name	Phone	Data Type	Phone
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

General Options: Required (checkbox checked), Default Value (dropdown menu).

Modified By: victorjoy.chokka, 6/3/2025, 11:27 PM.

## To create fields in an object:

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

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'FIELDS & RELATIONSHIPS' under 'Jewel Customer'. The main area displays the 'Custom Field Definition Detail' for a field named 'Email'. The field information includes:

Field Label	Email	Object Name	Jewel_Customer
Field Name	Email	Data Type	Email
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

General Options: Required (checkbox checked), Unique (checkbox checked), External ID (checkbox checked).

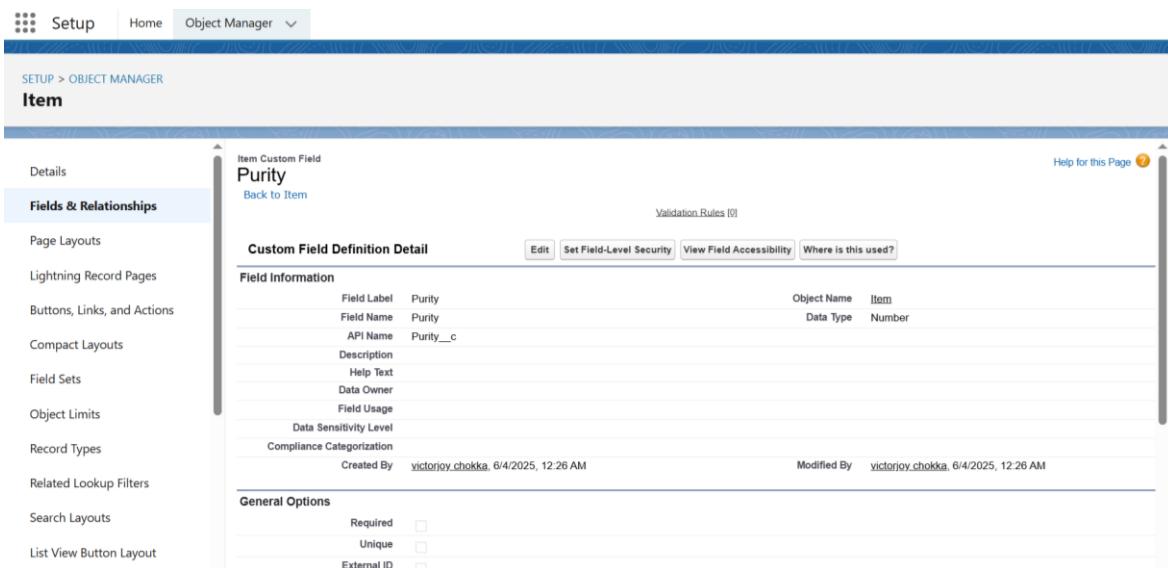
Created By: victorjoy.chokka, 6/3/2025, 11:28 PM. Modified By: victorjoy.chokka, 6/3/2025, 11:28 PM.

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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 Setup interface under the Object Manager for the 'Item' object. A custom field named 'Item Type' is being created. The field information includes:

- Field Label:** Item Type
- Field Name:** Item\_Type
- API Name:** Item\_Type\_\_c
- Data Type:** Picklist

The field is categorized under 'Compliance Categorization' and was created by 'victorjoy.chokka' on 6/4/2025, 12:27 AM. It was modified by 'victorjoy.chokka' on 6/4/2025, 12:27 AM.

## 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 Setup interface under the Object Manager for the 'Price' object. A custom field named 'Gold Price' is being created. The field information includes:

- Field Label:** Gold Price
- Field Name:** Gold\_Price
- API Name:** Gold\_Price\_\_c
- Data Type:** Currency

The field is categorized under 'Compliance Categorization' and was created by 'victorjoy.chokka' on 6/3/2025, 11:31 PM. It was modified by 'victorjoy.chokka' on 6/3/2025, 11:31 PM.

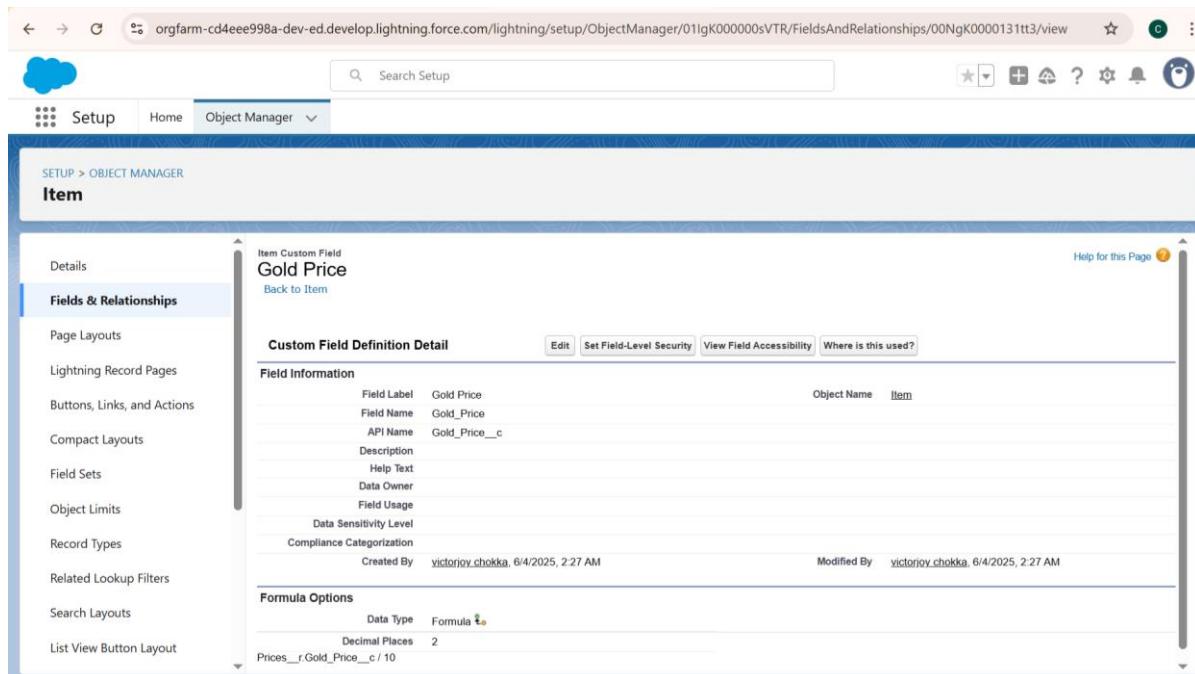
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### Creating Formula Field(Cross Object) in Item Object

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.



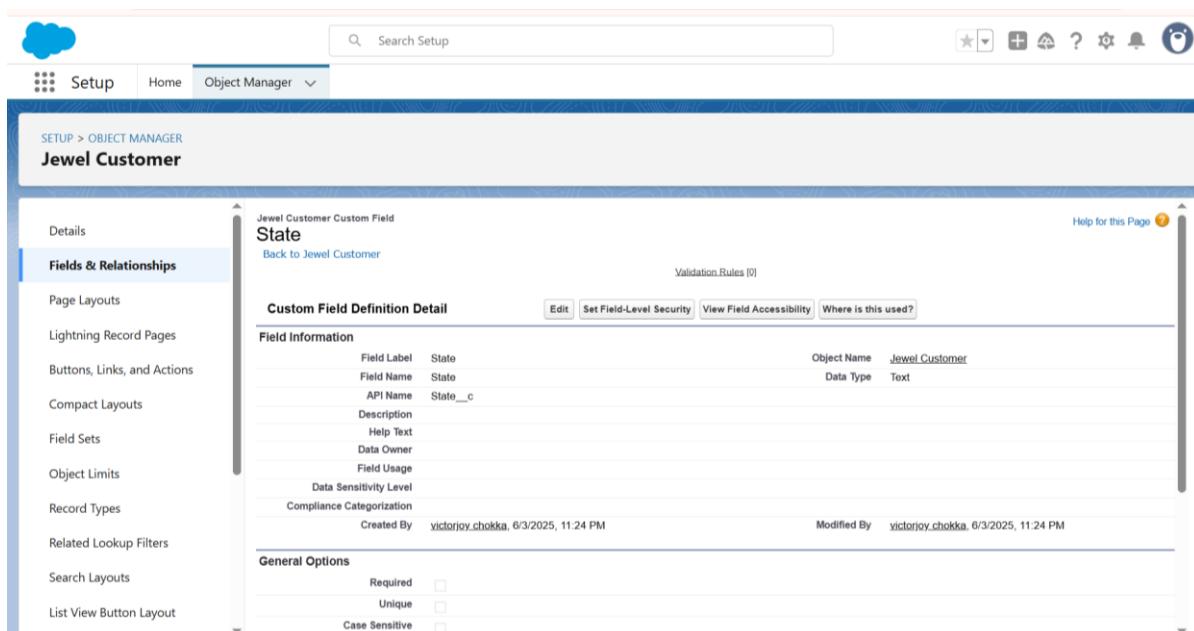
### Creating Text Field in Jewel Customer Object

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.

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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.



### 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:

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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.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a back arrow, forward arrow, search bar, and various setup icons. The main header says 'SETUP > OBJECT MANAGER' and 'Jewel Customer'. On the left, a sidebar lists options like Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area displays the 'Custom Field Definition Detail' for a field named 'Street'. The field information table includes:

Field Label	Street	Object Name	Jewel_Customer
Field Name	Street	Data Type	Text
API Name	Street_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	victorjoy.chokka, 6/3/2025, 11:25 PM	Modified By	victorjoy.chokka, 6/3/2025, 11:25 PM

Below the table, under 'General Options', there are checkboxes for Required, Unique, and Case Sensitive. A 'Validation Rules [0]' section is also present.

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

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The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "SETUP > OBJECT MANAGER" followed by "Jewel Customer". On the left, a sidebar titled "Fields & Relationships" lists various layout options like Page Layouts, Lightning Record Pages, and Field Sets. The main content area displays a "Custom Field Definition Detail" for a field named "Country". The field information includes:

Field Label	Country	Object Name	Jewel_Customer
Field Name	Country	Data Type	Text
API Name	Country_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	victorjoy.chokka, 6/3/2025, 11:25 PM	Modified By	victorjoy.chokka, 6/3/2025, 11:25 PM

Below this, under "General Options", there are checkboxes for Required, Unique, and Case Sensitive.

## Creating Text Field in Jewel Customer Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Jewel Customer) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as "Text".
4. Click on Next
5. Fill the above as following:
  - Field Label: Zip/Postal code
  - Length : 6
  - Field Name : gets auto generated

Click on Next >> Next >> Save and new

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The screenshot shows the Salesforce setup interface for creating a custom field. The object selected is 'Jewel Customer'. The field being created is named 'Zip/Postal code' with the API name 'Zip\_Postal\_code\_c'. The data type is set to 'Text'. Other details like description, help text, and data owner are also visible.

## 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 .

The screenshot shows the Salesforce setup interface for creating a custom field. The object selected is 'Price'. The field being created is named 'Silver Price' with the API name 'Silver\_Price\_c'. The data type is set to 'Currency'. Other details like description, help text, and data owner are also visible.

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## 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.

The screenshot shows the Salesforce Setup interface for creating a custom field. The URL is <https://orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK00000sVTR/FieldsAndRelationships/00NgK000012zwDa/view>. The page title is "Item Custom Field Customer Name". The "Fields & Relationships" tab is selected. The "Field Information" section shows the following details:

Field Label	Customer Name	Object Name	Item
Field Name	Customer_Name	Data Type	Lookup
API Name	Customer_Name__c		

The "Lookup Options" section shows:

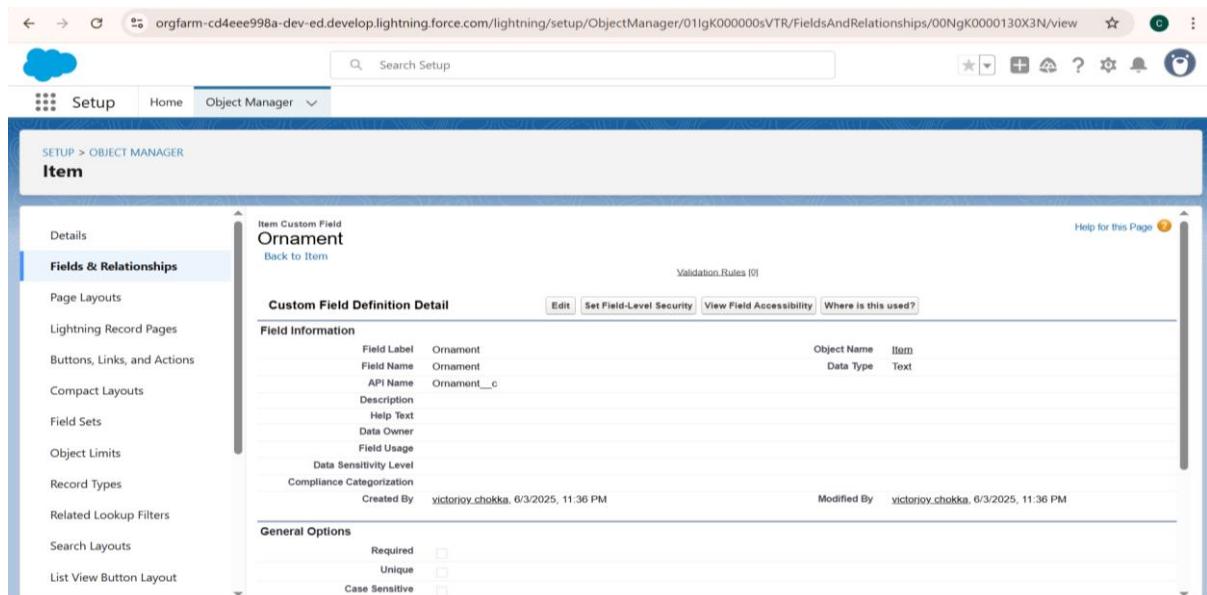
Related To	Jewel Customer	Child Relationship Name	Items
Related List Label	Items		
Required	<input type="checkbox"/>		

## Creating Text Field in Item Object

To create fields in an object:

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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.



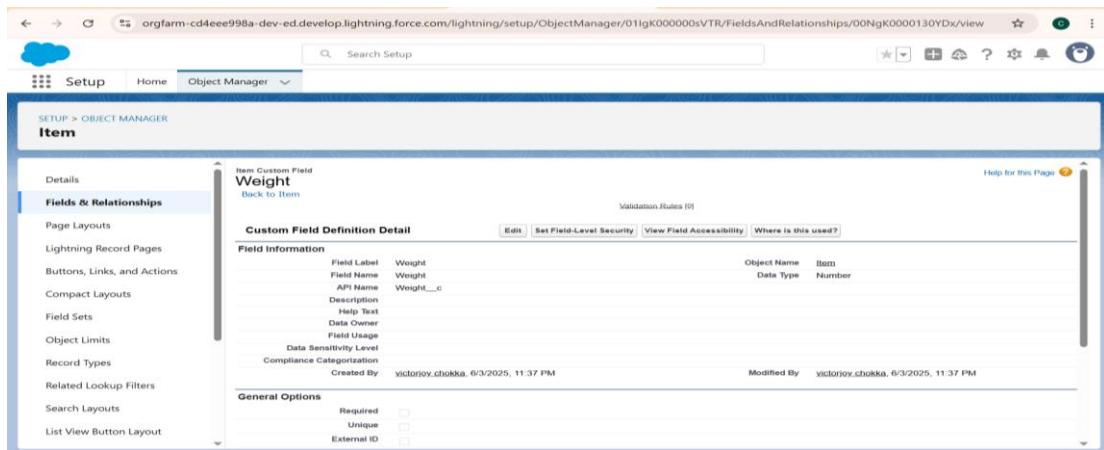
### Creating the number field in Item object

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

## CRM Application For Jewel Management

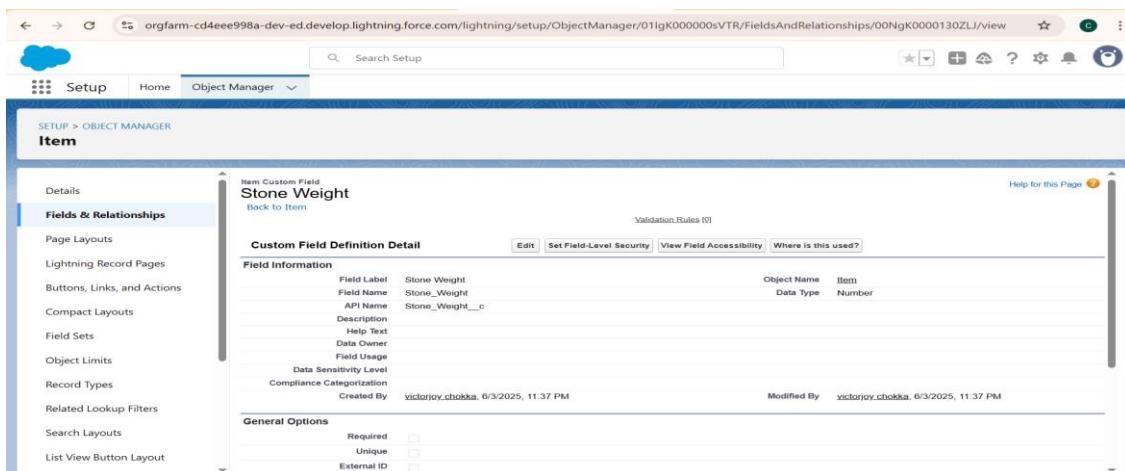
5. Field Name will be auto populated, and click on Next >> Next >> Save.



### 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.

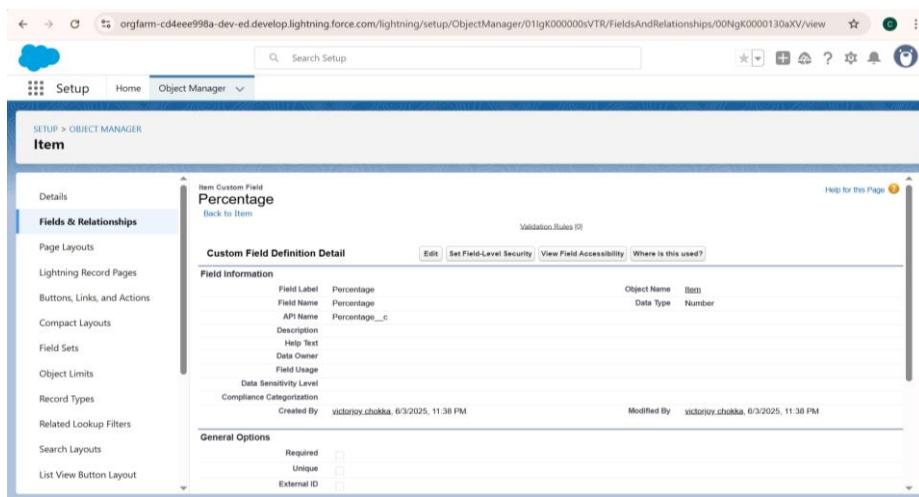


## CRM Application For Jewel Management

### 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.

# CRM Application For Jewel Management

The screenshot shows the Salesforce setup interface under 'Object Manager'. A custom field named 'Stone/Other Price' has been created for the 'Item' object. The field is of type 'Currency' and is labeled 'Stone/Other Price'. It has an API name of 'Stone\_Other\_Price\_c'. The 'General Options' section shows it is a custom field for the 'Salesforce - Developer Edition'.

## 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 .

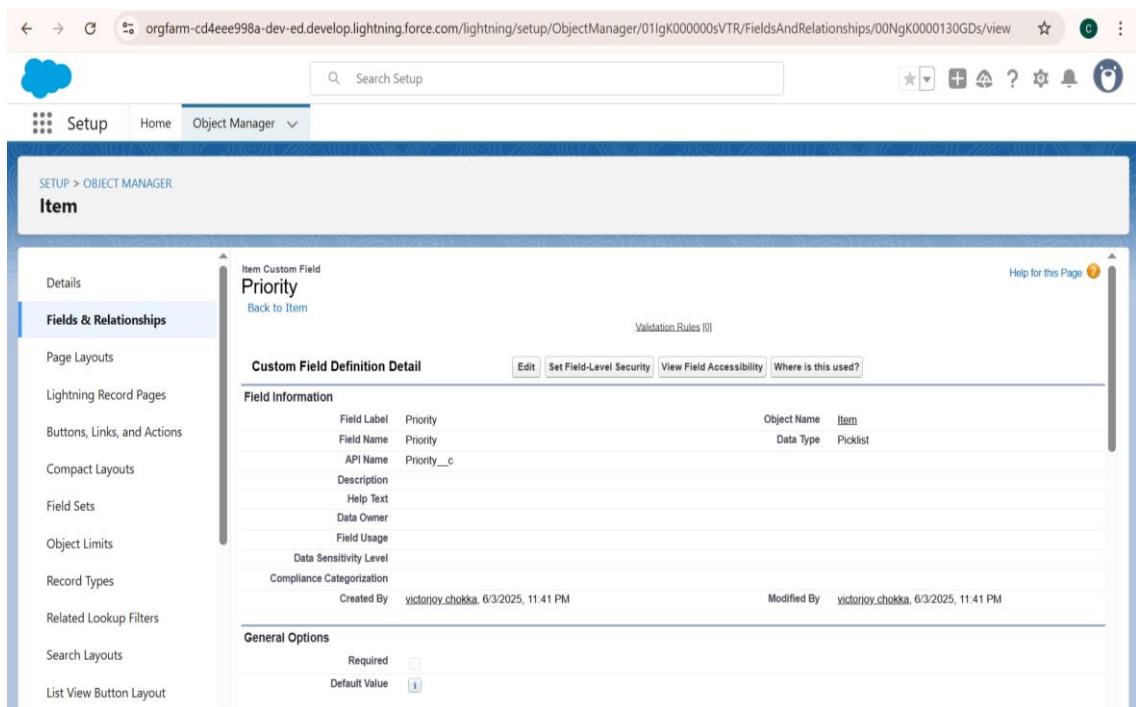
The screenshot shows the Salesforce setup interface under 'Object Manager'. A custom field named 'Expected Days Of Return' has been created for the 'Item' object. The field is of type 'Picklist' and is labeled 'Expected Days Of Return'. It has an API name of 'Expected\_Days\_Of\_Return\_c'. The 'General Options' section shows it is required and has a default value of '1'.

# CRM Application For Jewel Management

## 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 .

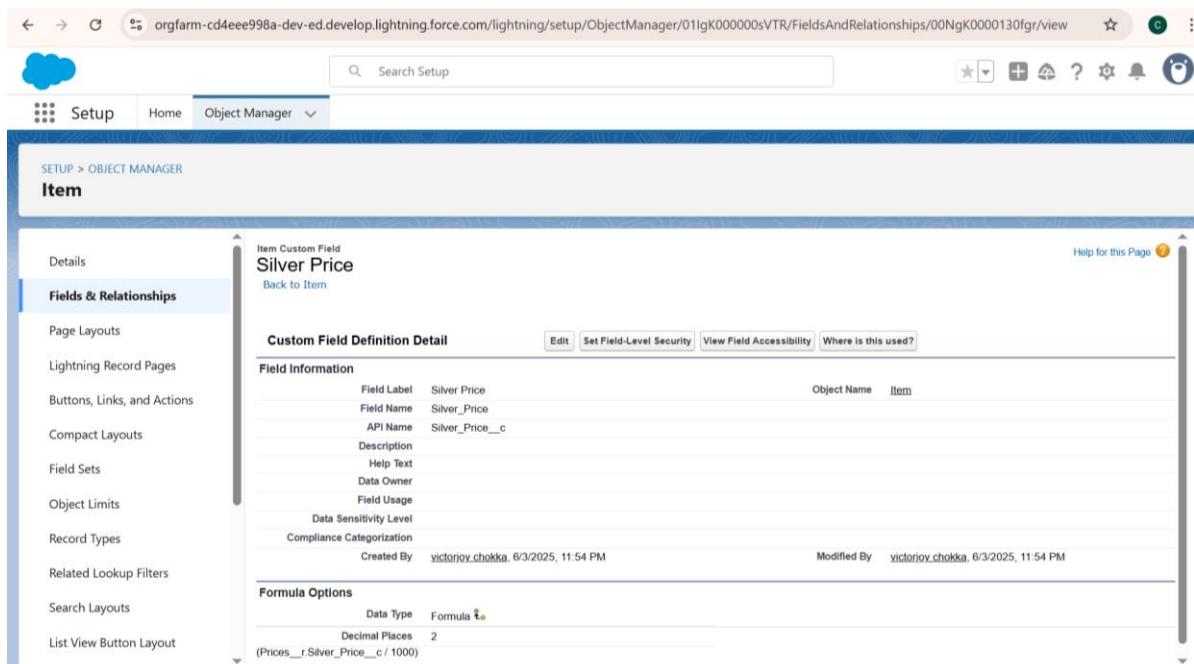


## Creating Formula Field in Item Object

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.

## CRM Application For Jewel Management

4. Give Field Label and Field Name as "Silver Price" and select formula return type as "Number" and Decimal as " 3 " and click next.
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.

# CRM Application For Jewel Management

The screenshot shows the Salesforce Setup interface under 'Object Manager' for the 'Item' object. A custom field named 'Purity Gold Price' is being edited. The 'Field Information' section shows the field label 'Purity Gold Price', field name 'Purity\_Gold\_Price\_c', and API name 'Purity\_Gold\_Price\_\_c'. The formula is defined as  $((Prices__r.Gold_Price__c * Purity__c) / 10)$ . The 'Formula Options' section indicates a decimal place of 2.

## 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.

The screenshot shows the Salesforce Setup interface under 'Object Manager' for the 'Item' object. A custom field named 'Total Weight' is being edited. The 'Field Information' section shows the field label 'Total Weight', field name 'Total\_Weight', and API name 'Total\_Weight\_\_c'. The formula is defined as  $(Weight__c - Stone_Weight__c)$ . The 'Formula Options' section indicates a decimal place of 3.

# CRM Application For Jewel Management

## 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 "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.

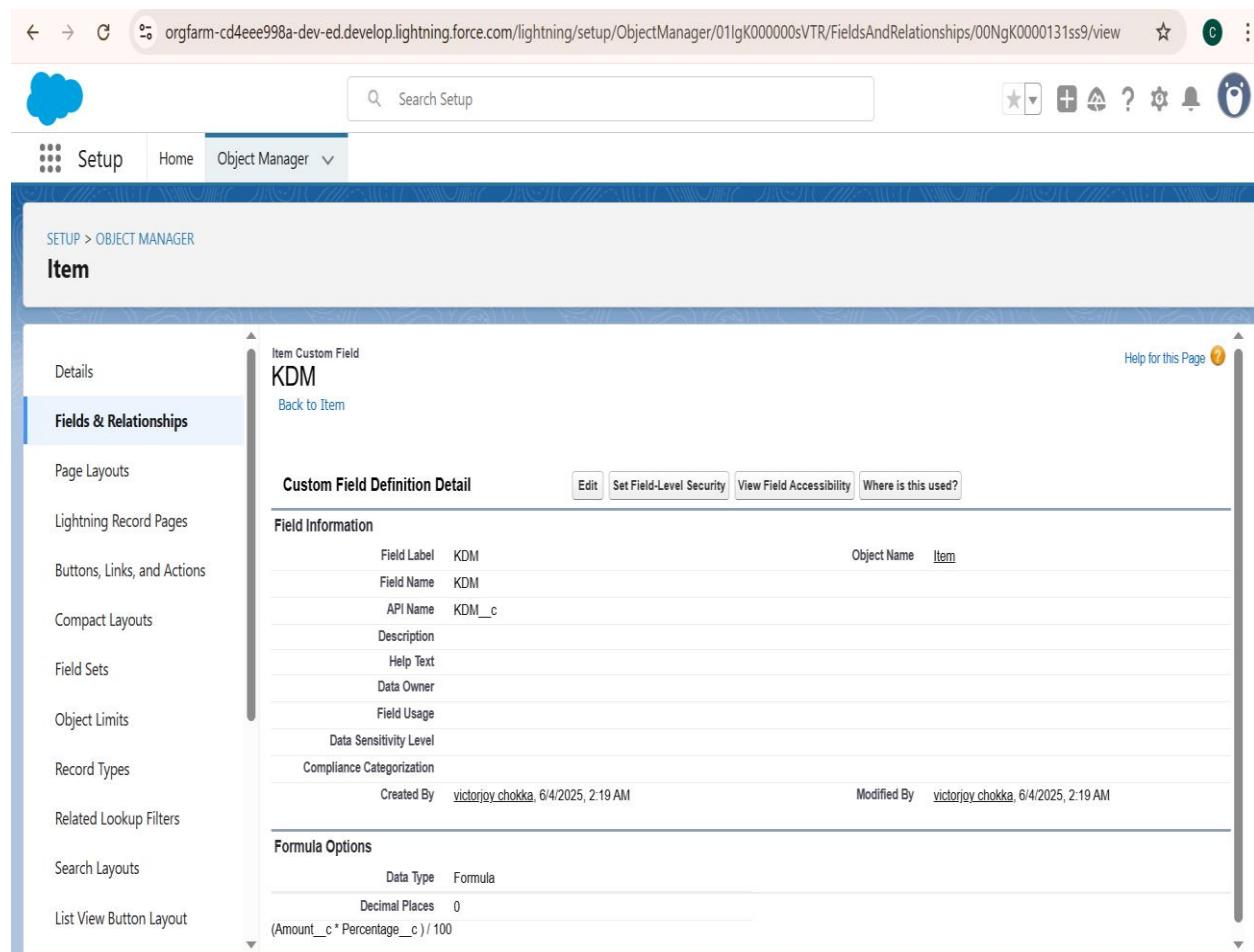
The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** orgfarm-cd4eee998a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK00000sVTR/FieldsAndRelationships/00NgK0000131GyA/view
- Navigation Bar:** Setup, Home, Object Manager
- Section:** SETUP > OBJECT MANAGER
- Object:** Item
- Field Definition:** Item Custom Field: Amount ~ Salesforce - Developer Edition
- Field Details:**
  - Field Label: Amount
  - Field Name: Amount
  - API Name: Amount\_c
  - Description: Help Text
  - Data Owner: (not specified)
  - Field Usage: (not specified)
  - Data Sensitivity Level: (not specified)
  - Compliance Categorization: (not specified)
- Created By:** victorjoy.chokka, 6/4/2025, 2:16 AM
- Modified By:** victorjoy.chokka, 6/4/2025, 2:16 AM
- Formula Options:**
  - Data Type: Formula
  - Decimal Places: 3
- Advanced Formula:** IF(ISPICKVAL( Item\_Type\_c , "Gold"), Total\_weight\_c \* Purity\_Gold\_Price\_c , Total\_weight\_c \* Silver\_Price\_c )

## CRM Application For Jewel Management

### 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 :  
$$(\text{Amount\_c} * \text{Percentage\_c}) / 100$$
6. Click "Check Syntax" and Next >> Next >> Save & New.



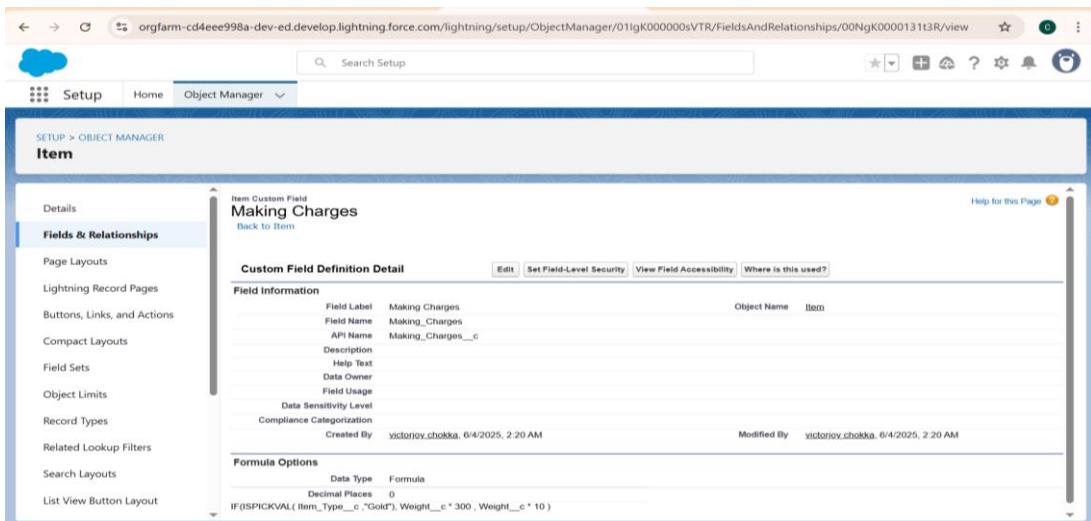
The screenshot shows the Salesforce Setup interface for creating a custom field. The URL in the browser is <https://orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK00000sVTR/FieldsAndRelationships/00NgK0000131ss9/view>. The page title is "SETUP > OBJECT MANAGER". The left sidebar shows navigation options like Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area displays the "Custom Field Definition Detail" for a field named "KDM". The "Field Information" section includes the Field Label "KDM", Field Name "KDM", API Name "KDM\_c", and a Description. It also shows the Object Name "Item". The "Formula Options" section shows the Data Type as "Formula" and the formula as  $(\text{Amount\_c} * \text{Percentage\_c}) / 100$ . Other sections visible include "Custom Field Definition Detail" buttons for Edit, Set Field-Level Security, View Field Accessibility, and Where is this used?.

### 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.

## CRM Application For Jewel Management

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.



## Creating Picklist Field in Customer Order 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 "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 .

# CRM Application For Jewel Management

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Fields & Relationships. The main content area is titled 'Customer Order Custom Field Order Status'. It shows the 'Custom Field Definition Detail' for 'Order Status'. Key details include:

- Field Label:** Order Status
- Field Name:** Order\_Status
- API Name:** Order\_Status\_\_c
- Data Type:** Picklist
- Object Name:** Customer\_Order
- Description:** (empty)
- Help Text:** (empty)
- Data Owner:** (empty)
- Field Usage:** (empty)
- Data Sensitivity Level:** (empty)
- Compliance Categorization:** (empty)
- Created By:** victorjoy.chokka, 6/4/2025, 2:22 AM
- Modified By:** victorjoy.chokka, 6/4/2025, 2:22 AM

## 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.

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Fields & Relationships. The main content area is titled 'Billing Custom Field Item'. It shows the 'Custom Field Definition Detail' for 'Item'. Key details include:

- Field Label:** Item
- Field Name:** Item
- API Name:** Item\_\_c
- Data Type:** Lookup
- Object Name:** Billing
- Description:** Billing Custom Field: Item ~ Salesforce - Developer Edition
- Help Text:** (empty)
- Data Owner:** (empty)
- Field Usage:** (empty)
- Data Sensitivity Level:** (empty)
- Compliance Categorization:** (empty)
- Created By:** victorjoy.chokka, 6/4/2025, 2:41 AM
- Modified By:** victorjoy.chokka, 6/4/2025, 2:41 AM

**Lookup Options:**

- Related To:** Item
- Related List Label:** Billings
- Required:** (checkbox)
- Child Relationship Name:** Billings

## CRM Application For Jewel Management

### 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.

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 'Billing'. On the left, a sidebar lists various customization options like 'Page Layouts', 'Lightning Record Pages', etc. The main content area displays the 'Custom Field Definition Detail' for a field named 'Ornament'. The 'Field Information' section shows the following details:

- Field Label: Ornament
- Field Name: Ornament
- API Name: Ornament\_\_c
- Description: Billing Custom Field: Ornament ~ Salesforce - Developer Edition
- Help Text: Field Usage, Data Sensitivity Level, Compliance Categorization
- Created By: victorjoy.chokka, 6/4/2025, 2:42 AM
- Modified By: victorjoy.chokka, 6/4/2025, 2:42 AM

The 'Formula Options' section shows the Data Type as 'Formula' with the formula 'Item\_\_r.Ornament\_\_c' entered. There are tabs at the top of the detail page: 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. A 'Help for this Page' link is also present.

### 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

## CRM Application For Jewel Management

6. Click "Check Syntax" and Next >> Next >> Save & New.

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'SETUP > OBJECT MANAGER' and lists various object types like Details, Fields & Relationships, Page Layouts, etc. Under 'Fields & Relationships', 'Billing' is selected. The main content area shows a custom field named 'Stone weight' for the 'Billing' object. The 'Field Information' section includes details such as Field Label: 'Stone weight', Field Name: 'Stone\_weight', API Name: 'Stone\_weight\_\_c', and Data Type: 'Formula'. The 'Formula Options' section shows 'Data Type: Formula' and 'Decimal Places: 2'. The 'Help for this Page' button is visible at the top right.

### Creating Formula Field in Billing Object

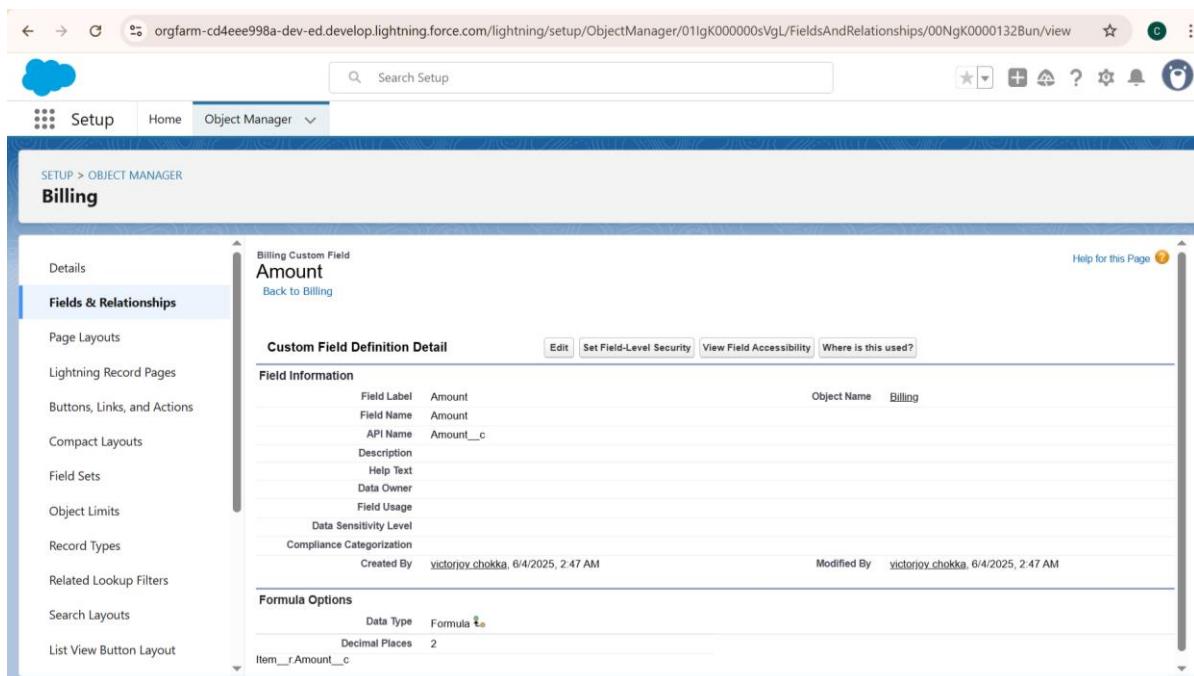
1. Go to setup >> click on Object Manager >> type object name (Billing) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Weight" and select formula return type as "Number" 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.

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'SETUP > OBJECT MANAGER' and lists various object types like Details, Fields & Relationships, Page Layouts, etc. Under 'Fields & Relationships', 'Billing' is selected. The main content area shows a custom field named 'Weight' for the 'Billing' object. The 'Field Information' section includes details such as Field Label: 'Weight', Field Name: 'Weight', API Name: 'Weight\_\_c', and Data Type: 'Formula'. The 'Formula Options' section shows 'Data Type: Formula' and 'Decimal Places: 2'. The 'Help for this Page' button is visible at the top right.

## CRM Application For Jewel Management

### 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.



### 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.

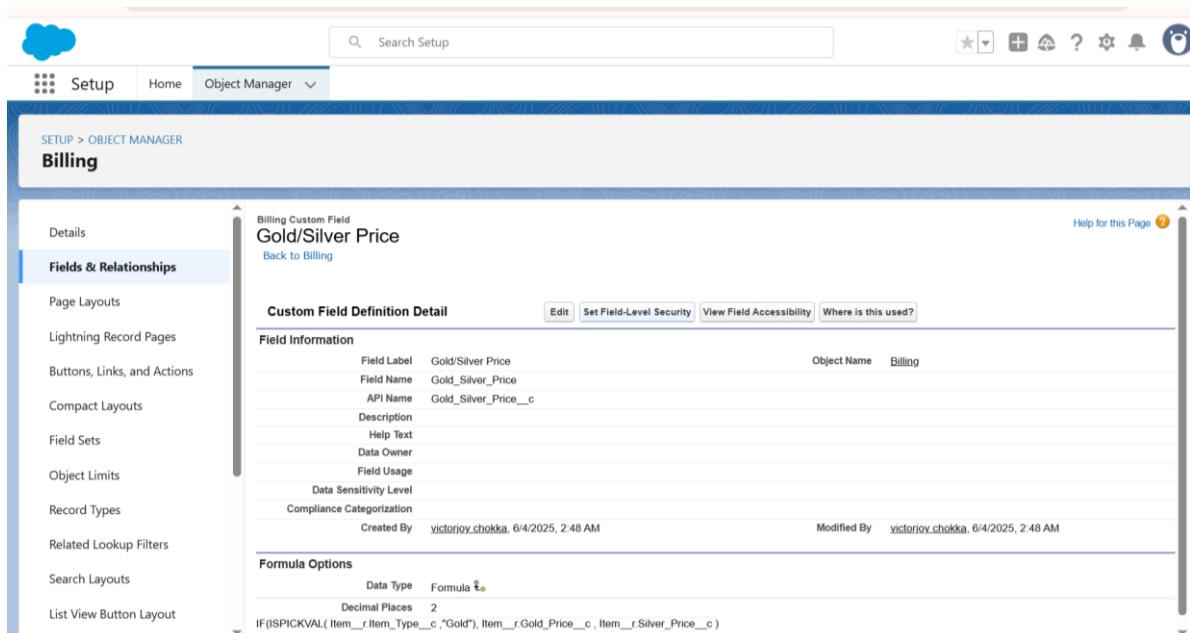
## CRM Application For Jewel Management

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.

# CRM Application For Jewel Management

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Fields & Relationships. Under 'Fields & Relationships', 'New' is selected. A search bar at the top right contains 'Search Setup'. The main content area displays a 'Custom Field Definition Detail' for a field named 'KDM Charge' on the 'Billing' object. The field information includes:

- Field Label: KDM Charge
- Field Name: KDM\_Charge
- API Name: KDM\_Charge\_\_c
- Description: Help Text
- Data Owner: Field Usage
- Data Sensitivity Level: Billing
- Compliance Categorization: Billing Custom Field: KDM Charge ~ Salesforce - Developer Edition
- Created By: victorjoy.chokka, 6/4/2025, 2:49 AM
- Modified By: victorjoy.chokka, 6/4/2025, 2:49 AM
- Formula: Item\_\_r.KDM\_\_c
- Data Type: Formula
- Decimal Places: 0

## 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
6. Click "Check Syntax" and Next >> Next >> Save & New.

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Fields & Relationships. Under 'Fields & Relationships', 'New' is selected. A search bar at the top right contains 'Search Setup'. The main content area displays a 'Custom Field Definition Detail' for a field named 'Making Charges' on the 'Billing' object. The field information includes:

- Field Label: Making Charges
- Field Name: Making\_Charges
- API Name: Making\_Charges\_\_c
- Description: Help Text
- Data Owner: Field Usage
- Data Sensitivity Level: Billing
- Compliance Categorization: Billing Custom Field: Making Charges ~ Salesforce - Developer Edition
- Created By: victorjoy.chokka, 6/4/2025, 2:51 AM
- Modified By: victorjoy.chokka, 6/4/2025, 2:51 AM
- Formula Options: Data Type: Formula, Decimal Places: 2
- Advanced Formula: Item\_\_r.Making\_Charges\_\_c

## CRM Application For Jewel Management

### 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.

The screenshot shows the Salesforce Setup interface for the Object Manager. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is 'SETUP > OBJECT MANAGER' followed by 'Billing'. On the left, a sidebar lists various configuration options like Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, etc. The main content area displays the 'Custom Field Definition Detail' for a field named 'Stones/other price'. The field information includes:  
Field Label: Stones/other price  
Object Name: Billing  
Field Name: Stones\_other\_price  
API Name: Stones\_other\_price\_c  
Description: (empty)  
Help Text: (empty)  
Data Owner: (empty)  
Field Usage: (empty)  
Data Sensitivity Level: (empty)  
Compliance Categorization: (empty)  
Created By: victorjoy.chokka, 6/4/2025, 2:53 AM  
Modified By: victorjoy.chokka, 6/4/2025, 2:53 AM  
Formula Options:  
Data Type: Formula  
Decimal Places: 2  
Advanced Formula: Item\_\_r.Stone\_other\_price\_\_c

# CRM Application For Jewel Management

## 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 screenshot shows the Salesforce Setup interface for creating a custom field. The URL is orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01igK000000sVgL/FieldsAndRelationships/00NgK0000131v0R/view. The page title is 'Billing Custom Field Total Amount'. The 'Field Information' section shows the following details:

Field Label	Total Amount
Field Name	Total_Amount
API Name	Total_Amount_c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	victorjoy.chokka, 6/4/2025, 2:54 AM
Modified By	victorjoy.chokka, 6/4/2025, 2:54 AM

The 'Formula Options' section shows:

Data Type	Formula
Decimal Places	0
Amount_c + KDM_Charge_c + Stones_other_price_c + Making_Charges_c	

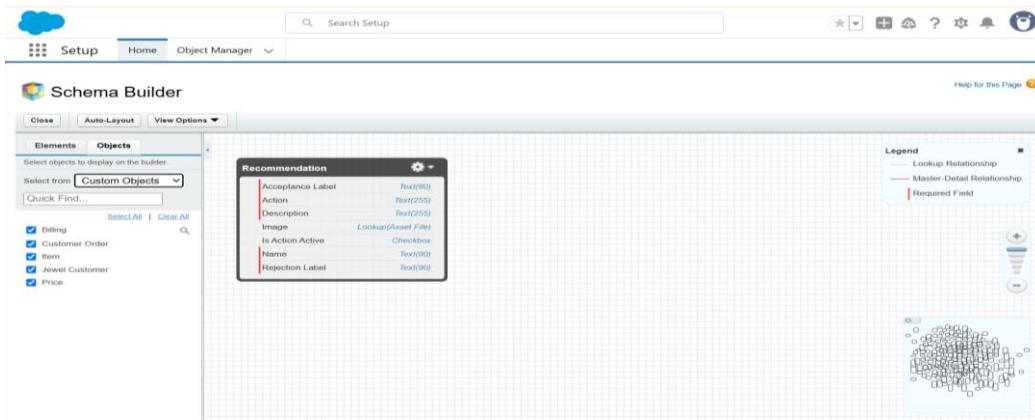
## Schema Builder

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.

## CRM Application For Jewel Management



### 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.
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.

# CRM Application For Jewel Management

## 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}$"))
    ),
    NOT(ISBLANK(Zip_Postal_code__c))
)

```

## CRM Application For Jewel Management

5. 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.

The screenshot shows the Salesforce Object Manager interface for the 'Jewel Customer' object. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, and Record Types. The main content area is titled 'Jewel Customer Validation Rule'. It displays the validation rule details:

Rule Name	Postal_Code	Status
Error Condition Formula	AND( OR( LEN(Zip_Postal_code_c) <> 6, NOT(REGEX(Zip_Postal_code_c, "[0-9]{6}\$")) ) NOT(ISBLANK(Zip_Postal_code_c)) )	Active ✓
Error Message	Must contain 6 digits	Error Location Zip/Postal code
Description	victorjoy_chokka, 6/4/2025, 3:13 AM	Modified By victorjoy_chokka, 6/4/2025, 3:13 AM
Created By	victorjoy_chokka	

### NOTE:

#### Create One more Validation rule for Jewel Customer object.

1. Enter Rule name as "ValidationRule For JewelCustomerObject".
2. Insert the Error Condition Formula as : -  

```
OR( ISBLANK( City_c ), ISBLANK( Country_c ),ISBLANK( Phone_c  
,ISBLANK( State_c ),ISBLANK( Street_c ) )
```
3. Enter the Error Message as "Please fill Required fields", select the Error location as Top of Page and click Save.

## CRM Application For Jewel Management

The screenshot shows the Salesforce Setup interface for the 'Jewel Customer' object. On the left, a sidebar lists various setup categories like Object Limits, Record Types, and Validation Rules. The 'Validation Rules' category is currently selected and highlighted in blue. The main content area displays the 'Jewel Customer Validation Rule' detail page. The rule is named 'ValidationRule\_For\_JewelCustomerObject'. The 'Error Condition Formula' is set to 'OR(ISBLANK( City\_\_c ), ISBLANK( Country\_\_c ),ISBLANK( Phone\_\_c ),ISBLANK( State\_\_c ),ISBLANK( Street\_\_c ))'. The error message is 'Please fill Required fields'. The rule is marked as 'Active'. The 'Error Location' is set to 'Top of Page'. The 'Created By' and 'Modified By' fields both show 'victorjoy\_chokka, 6/4/2025, 3:16 AM'. There are 'Edit' and 'Clone' buttons at the top right of the detail page.

### 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.

# CRM Application For Jewel Management

The screenshot shows the Salesforce Setup interface for managing validation rules. The top navigation bar includes links for Home, Object Manager, and a search bar labeled "Search Setup". The main title is "Item Validation Rule" under the "Item" section of the Object Manager.

The left sidebar lists various setup categories: 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, and List View Button Layout.

The "Validation Rule Detail" section displays the following information:

Rule Name	ValidationRule_For_Item	Active
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 ) )	<input checked="" type="checkbox"/>
Error Message	Please fill Required fields	Error Location
Description		Top of Page
Created By	victorjoy_chokka, 6/4/2025, 3:18 AM	Modified By
		victorjoy_chokka, 6/4/2025, 3:18 AM

Buttons for "Edit" and "Clone" are located at the top right of the detail section.

# CRM Application For Jewel Management

## 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 interface for managing Profiles. The top navigation bar includes links for Setup, Home, and Object Manager. A search bar is present at the top right. The main content area is titled 'SETUP Profiles' and displays the 'Gold Smith' profile. The profile details include its name ('Gold Smith'), user license ('Salesforce'), and creation information ('Created By: victorjoy\_chokka, 6/4/2025, 3:20 AM'). The 'Custom Profile' checkbox is checked. Below this, the 'Page Layouts' section lists standard object layouts for Global, Email Application, and Home Page Layout, along with their corresponding location group assignments. A 'Help for this Page' link is visible in the top right corner of the profile detail section.

#### 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.

## CRM Application For Jewel Management

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.

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egK000002O0iT>. The page title is "Profiles". The left sidebar shows "profiles" under "Users" and "Profiles" is selected. The main content area displays the "Worker" profile details. The "Profile Detail" section includes fields for Name (Worker), User License (Salesforce Platform), Description, Created By (victorjoy.chokka, 6/4/2025, 3:30 AM), Modified By (victorjoy.chokka, 6/5/2025, 8:55 PM), and a "Custom Profile" checkbox which is checked. The "Page Layouts" section shows standard object layouts for Global, Lead, and Location. The Global layout is set to "Global Layout [View Assignment]". The Lead layout is set to "Lead Layout [View Assignment]". The Location layout is set to "Location Layout [View Assignment]". The Location Group layout is set to "Location Group Layout [View Assignment]".

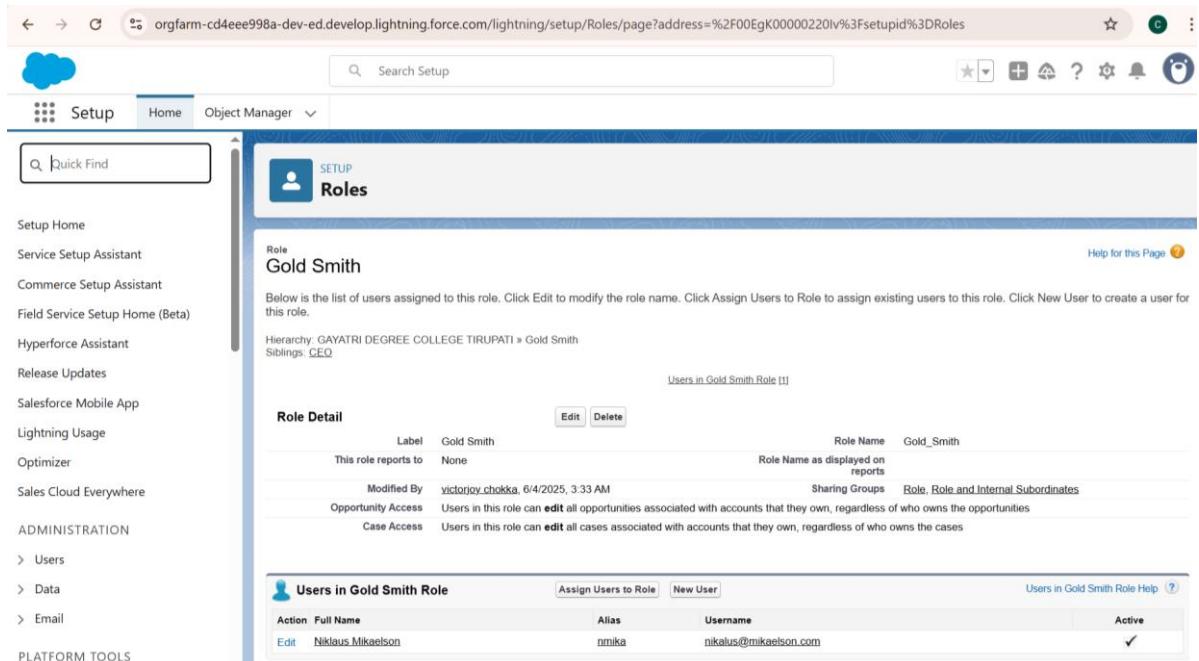
# CRM Application For Jewel Management

## 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.



#### 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.

# CRM Application For Jewel Management

The screenshot shows the Salesforce Setup Roles page for the 'Worker' role. The 'Role Detail' section displays the following information:

Label	Worker	Role Name	Worker
This role reports to	Gold Smith	Role Name as displayed on reports	
Modified By	victorjoy.chokka, 6/4/2025, 3:34 AM	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can <b>edit</b> all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can <b>edit</b> all cases associated with accounts that they own, regardless of who owns the cases		

The 'Users in Worker Role' section lists two users:

Action	Full Name	Alias	Username	Active
Edit	Kol Mikaelson	kmika	kol@mikaelson.com	✓
Edit	Akkala Harathi	ahara	akkala@harathi.com	✓

# CRM Application For Jewel Management

## 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. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar says 'Search Setup'. On the left, a sidebar menu is open under 'Users', showing options like 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Prospector'. Under 'User Management Settings', 'Users' is selected and highlighted with a blue bar. The main content area is titled 'User' and shows 'Niklaus Mikaelson'. The 'User Detail' section contains the following information:

Name	Niklaus Mikaelson	Role	Gold_Smith
Alias	nmika	User License	Salesforce
Email	cvictorjoy004@gmail.com [Verify]	Profile	Gold_Smith
Username	nikalus@mikaelson.com	Active	<input checked="" type="checkbox"/>
Nickname	nikumike	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">Edit</a>

# CRM Application For Jewel Management

## Create User

1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
  - First Name : Kol
  - Last Name : Mikaelson
  - Alias : Give a Alias Name
  - Email id : Give your Personal Email id
  - Username : Username should be in this form: text@text.text
  - Nick Name : Give a Nickname
  - Role : Worker
  - User licence : Salesforce Platform
  - Profiles : Worker
3. Save.

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar navigation bar is visible, with the 'Users' section currently selected. The main content area displays a 'User Detail' form for a user named 'Kol Mikaelson'. The form includes fields for Name, Alias, Email, Username, Nickname, and various user settings like Role, User License, and Profile. The 'Role' field is set to 'Worker', 'User License' to 'Salesforce Platform', and 'Profile' to 'Worker'. The 'Active' checkbox is checked. Other settings include Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, and Data.com User Type. The 'Edit' button is highlighted at the top of the form.

# CRM Application For Jewel Management

## Note:

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

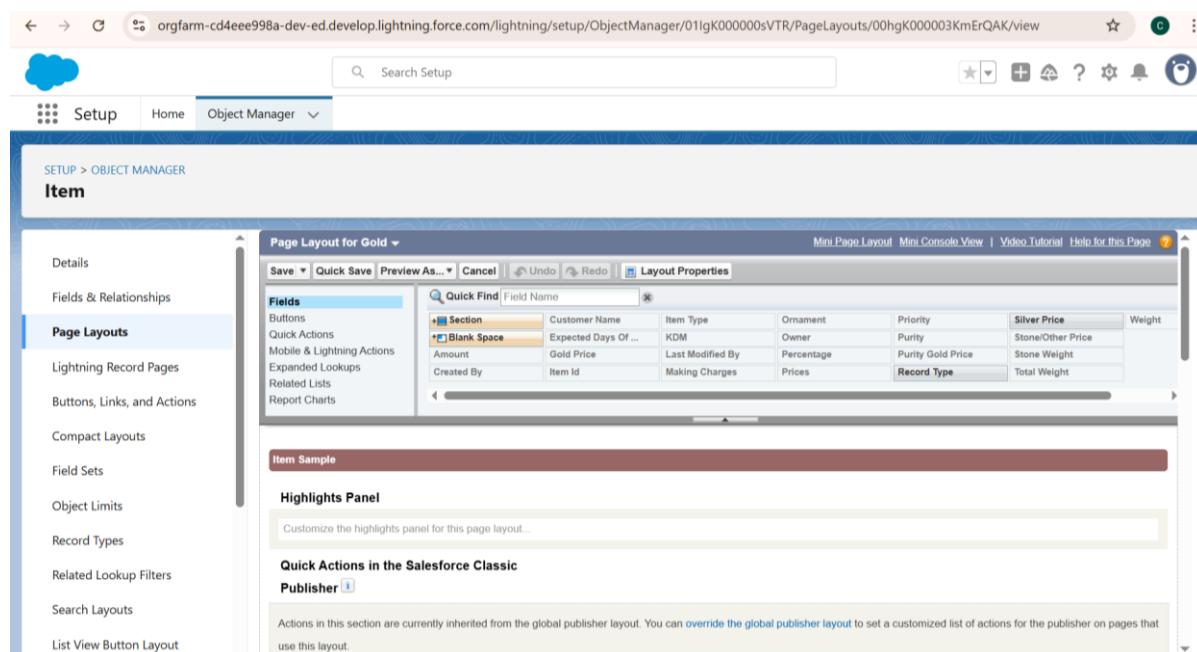
The screenshot shows the Salesforce Setup interface for managing users. The left sidebar is expanded, showing various categories under 'User Management Settings' and 'Users'. The main content area displays the 'User Detail' screen for a user named 'Akkala Harathi'. The 'Edit' button is highlighted. The user's details include Name: Akkala Harathi, Alias: ahara, Email: cvictorjoy004@gmail.com [Verify], Username: akkala@harathi.com, Nickname: harathi, Title: , Company: , Department: , Division: , Address: , Time Zone: (GMT-07:00) Pacific Daylight Time (America/Los\_Angeles), Locale: English (United States), Language: English, and Delegated Approver: . The 'Role' section shows 'Worker' selected. Other roles listed are Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, and Data.com User Type. The 'User License' is set to 'Salesforce Platform' and the 'Profile' is 'Worker'. The 'Active' checkbox is checked. The status bar at the bottom indicates 'Last Modified: 1 hour ago'.

# CRM Application For Jewel Management

## 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.



# CRM Application For Jewel Management

## 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 titled 'SETUP > OBJECT MANAGER' and has a 'Page Layouts' section selected. The main area is titled 'Page Layout for Silver' and contains a 'Fields' section with several fields listed: Section, Customer Name, Item Type, Ornament, Priority, Silver Price, Stone/Other Price, Weight, Blank Space, Expected Days Of ..., KDM, Owner, Purity, Gold Price, Last Modified By, Percentage, Purify Gold Price, Amount, Item Id, Making Charges, Prices, Record Type, Created By, Total Weight, and Report Charts. Below the fields is a 'Highlights Panel' with a note about Publisher quick actions. The top navigation bar includes links for Mini Page Layout, Mini Console View, Video Tutorial, and Help for this Page.

# CRM Application For Jewel Management

## 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 top navigation bar includes links for Setup, Home, and Object Manager. The main title is 'SETUP > OBJECT MANAGER Item'. On the left, a sidebar lists various object settings like Details, Fields & Relationships, Page Layouts, and Record Types (which is currently selected). The main content area displays the 'Record Type Gold' page. It shows the 'Record Type Label' as 'Gold', 'Record Type Name' as 'Gold', and 'Namespace Prefix' as 'Gold'. The 'Description' field contains 'Gold items information'. The 'Created By' field shows 'victorjoy.chokka, 6/4/2025, 9:37 PM' and the 'Modified By' field shows 'victorjoy.chokka, 6/4/2025, 9:37 PM'. A note at the bottom of the page says: 'Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.' Below this, a section titled 'Picklists Available for Editing' lists three fields: 'Expected Days Of Return', 'Item Type', and 'Priority', each with an 'Edit' link and a modified date of '6/4/2025, 9:37 PM'.

# CRM Application For Jewel Management

## 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. A new Record Type named 'Silver' has been created. The details are as follows:

- Record Type Label:** Silver
- Description:** Silver items information
- Created By:** victorjoy.chokka, 6/4/2025, 9:37 PM
- Modified By:** victorjoy.chokka, 6/4/2025, 9:37 PM
- Status:** Active (checked)

Below the main record type details, there is a table titled "Picklists Available for Editing" which lists three fields:

Action	Field	Modified Date
Edit	Expected Days Of Return	6/4/2025, 9:37 PM
Edit	Item Type	6/4/2025, 9:37 PM
Edit	Priority	6/4/2025, 9:37 PM

# CRM Application For Jewel Management

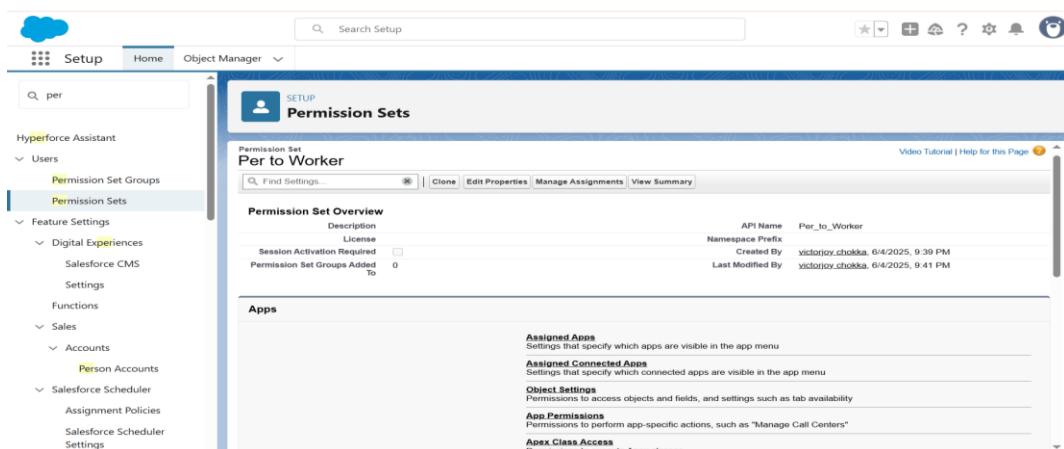
## MILESTONE-11

### 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.



## **CRM Application For Jewel Management**

### **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.

#### **Create a Trigger Handler class**

## CRM Application For Jewel Management

### **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 Management

```

1  public class UpdatePaidAmountTriggerHandler {
2
3     public static void handleBeforeInsert(List<Billing__c> newBillings) {
4
5         for (Billing__c billing : newBillings) {
6             billin
7                 Entity Type          Entities          Related
8                     Classes           Name       Namespace
9                     Triggers          UpdatePaidAmountTrig...
10                    Pages            Paid_Amount
11                    Page Components    ApexTrigger
12                    Objects           Paying_Amo...
13                    Static Resources   CustomField...
14                    Packages          Billing__c
15
16         }
17
18         for (Billing__c billing : newBillings) {
19             Billing__c oldBilling = oldBillingsMap.get(billing.Id);
20
21             Decimal oldPaidAmount = oldBilling.Paid_Amount__c;
22
23             billing.Paid_Amount__c = oldPaidAmount + billing.Paying_Amount__c;
24
}

```

## 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);
    }
}

```

```

1  trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {
2
3     if (Trigger.isInsert) {
4
5         UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);
6
7     } else if (Trigger.isUpdate) {
8         UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap,
9             Trigger.new);
10
11
12
13
}

```

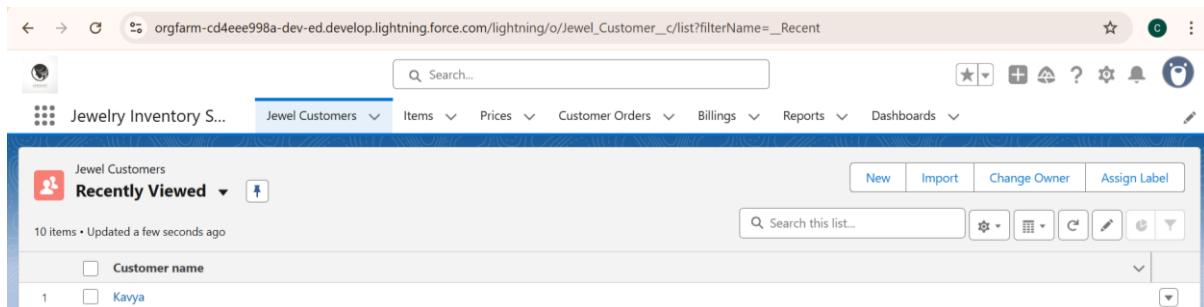
# CRM Application For Jewel Management

## MILESTONE-13

### User Adoption

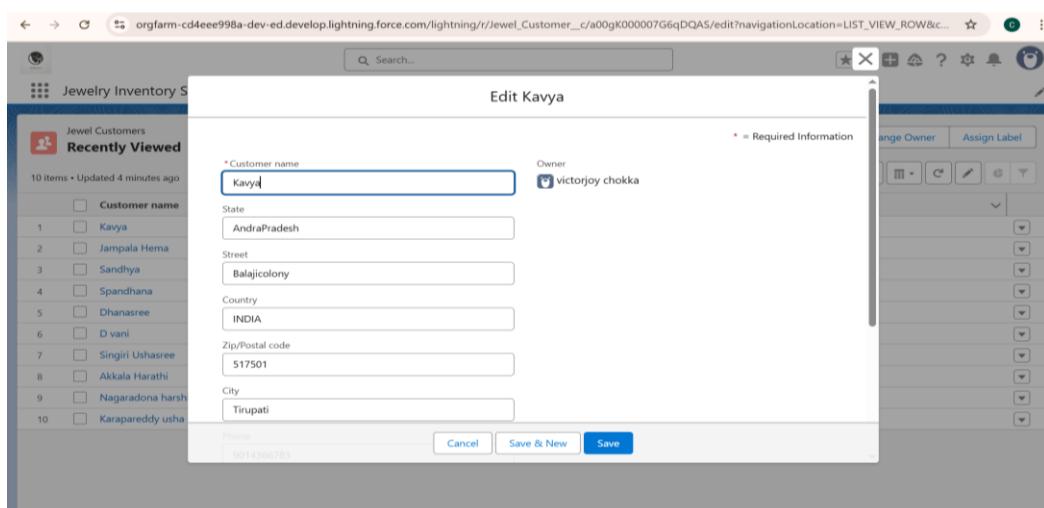
#### Create a Record (Jewel Customer)

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)

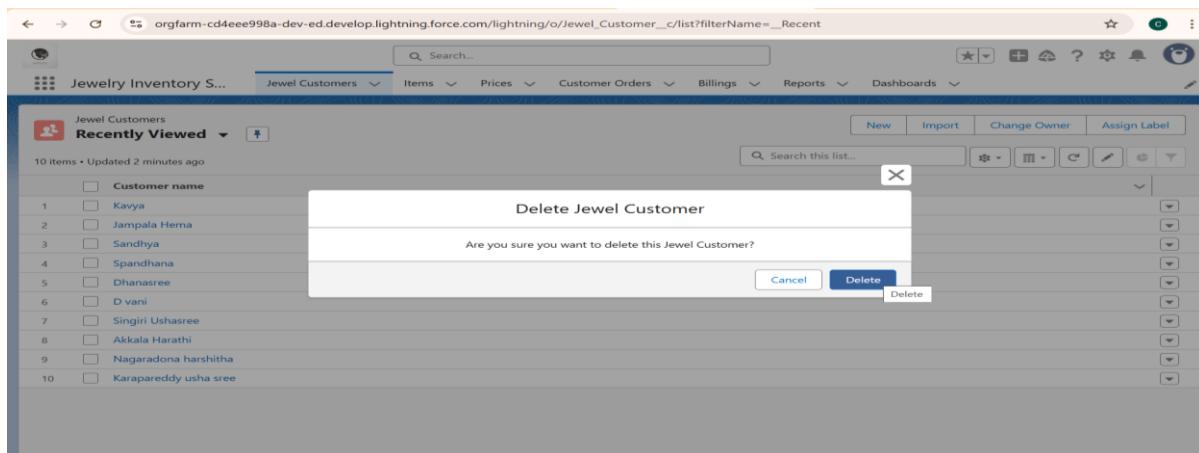
1. Click on App Launcher on the left side of the screen.
2. Search Jewelry Inventory System & click on it.
3. Click on the Jewel Customer Tab.
4. Click on any record name. you can see the details of the Jewel Customer.



# CRM Application For Jewel Management

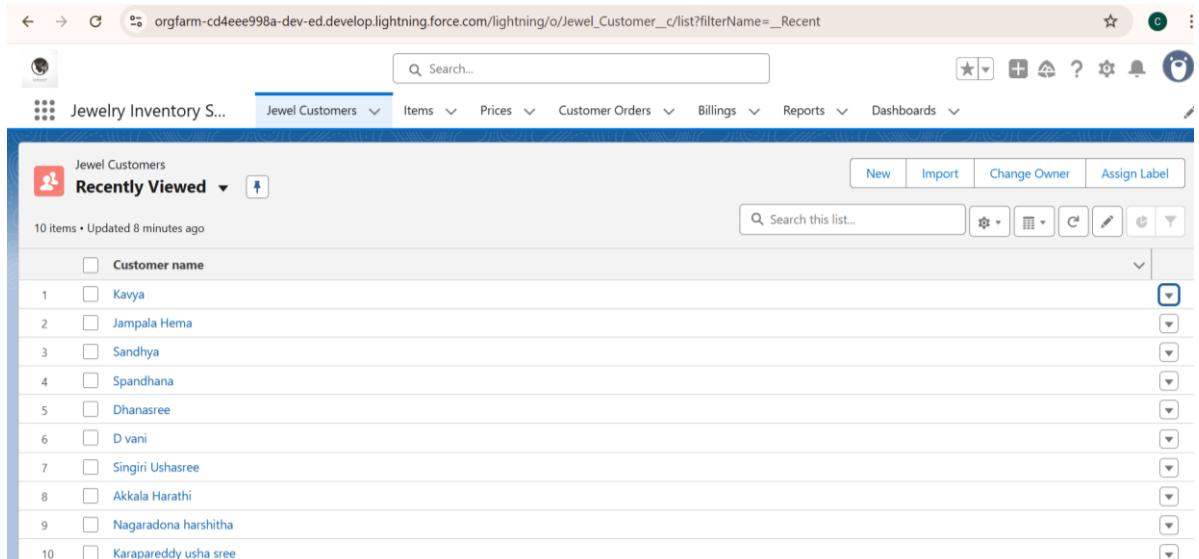
## Delete a Record (Jewel Customer)

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 Management

The screenshot shows the 'Items' section of the CRM application. The title bar indicates the URL is [https://orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/o/Item\\_\\_c/list?filterName=\\_Recent](https://orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/o/Item__c/list?filterName=_Recent). The page header includes a search bar, a star icon, and various navigation links: Jewelry Inventory S..., Jewel Customers, Items, Prices, Customer Orders, Billings, Reports, Dashboards.

The main content area is titled 'Items' and 'Recently Viewed'. It displays a list of 10 items, each with a checkbox and a link. The items are numbered 1 to 10 and labeled 'Item-01' through 'Item-10'. A note at the top says '10 items • Updated a few seconds ago'. To the right of the list are several icons for filtering, searching, and other actions. A large empty space is visible below the list.

Item Id	Link
1	<a href="#">Item-01</a>
2	<a href="#">Item-02</a>
3	<a href="#">Item-03</a>
4	<a href="#">Item-04</a>
5	<a href="#">Item-05</a>
6	<a href="#">Item-06</a>
7	<a href="#">Item-07</a>
8	<a href="#">Item-08</a>
9	<a href="#">Item-09</a>
10	<a href="#">Item-10</a>

The screenshot shows the 'Prices' section of the CRM application. The title bar indicates the URL is [https://orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/o/Price\\_\\_c/list?filterName=\\_Recent](https://orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/o/Price__c/list?filterName=_Recent). The page header includes a search bar, a star icon, and various navigation links: Jewelry Inventory S..., Jewel Customers, Items, Prices, Customer Orders, Billings, Reports, Dashboards.

The main content area is titled 'Prices' and 'Recently Viewed'. It displays a list of 10 prices, each with a checkbox and a link. The prices are numbered 1 to 10 and labeled 'Dhanasree' through 'Nagaradona harshitha'. A note at the top says '10 items • Updated a few seconds ago'. To the right of the list are several icons for filtering, searching, and other actions. A large empty space is visible below the list.

Item Price	Link
1	<a href="#">Dhanasree</a>
2	<a href="#">D vani</a>
3	<a href="#">Kavya</a>
4	<a href="#">Spandhana</a>
5	<a href="#">Singiri Ushasree</a>
6	<a href="#">Jampala Hema</a>
7	<a href="#">Sandhya</a>
8	<a href="#">Karapareddy usha sree</a>
9	<a href="#">Akkala Harathi</a>
10	<a href="#">Nagaradona harshitha</a>

# CRM Application For Jewel Management

The screenshot shows the 'Customer Orders' list view. At the top, there is a search bar with placeholder text 'Search...' and a toolbar with various icons. Below the toolbar, a navigation bar includes links for 'Jewelry Inventory S...', 'Customer Orders' (which is highlighted in blue), 'Billings', 'Reports', and 'Dashboards'. A sub-header 'Recently Viewed' is displayed above the main list. The main list contains 10 items, each with a checkbox and a link to 'Order - 0010' through 'Order - 0001'. The items are numbered 1 to 10.

Customer Order No
1 Order - 0010
2 Order - 0009
3 Order - 0008
4 Order - 0007
5 Order - 0006
6 Order - 0005
7 Order - 0004
8 Order - 0003
9 Order - 0002
10 Order - 0001

The screenshot shows the 'Billings' list view. The interface is similar to the Customer Orders view, with a search bar, toolbar, and navigation bar. The 'Billings' link in the navigation bar is highlighted in blue. A sub-header 'Recently Viewed' is shown above the list. The main list contains 10 items, each with a checkbox and a link to 'Nagaradona harshitha' through 'Akkala Harathi'. The items are numbered 1 to 10.

Billing Name
1 Nagaradona harshitha
2 Singiri Ushasree
3 Karapareddy usha sree
4 Dhanasree
5 D vani
6 Sandhya
7 Jampala Hema
8 Nagaradona harshitha
9 Kavya
10 Akkala Harathi

# CRM Application For Jewel Management

## MILESTONE-14

### Reports

#### Create Report

1. Go to the app >> click on the reports tab.
2. Click New Report.
3. Select report type (Item with Prices) 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.

The screenshot shows the Salesforce Lightning interface for creating a report. The top navigation bar includes links for Jewelry Inventory S..., Jewel Customers, Items, Prices, Customer Orders, Billings, Reports, and Dashboards. The 'Reports' tab is selected. A sub-menu for 'REPORT' is open, showing 'New Items with Prices Report' and 'Items with Prices'. The main content area is titled 'Items with Prices' and shows a table with 11 rows of data. The table has columns for Item: Item Id, Prices: Item Price, Prices: Gold Price, and Prices: Silver Price. The data includes items like Item-04, Item-10, Item-01, etc., with their respective prices. On the left, there's a sidebar with 'Outline' and 'Filters' sections, and a note about previewing a limited number of records. The bottom right of the table has a 'Run' button.

	Item: Item Id	Prices: Item Price	Prices: Gold Price	Prices: Silver Price
1	Item-04	Nagaradona harshitha	\$10,000.00000	\$15,000.00000
2	Item-10	Nagaradona harshitha	\$10,000.00000	\$15,000.00000
3	Item-01	Kavya	\$1,000.00000	\$2,000.00000
4	Item-09	Singiri Ushasree	\$10,000.00000	\$20,000.00000
5	Item-02	Jampala Hema	\$5,000.00000	\$15,000.00000
6	Item-03	Sandhya	\$7,000.00000	\$3,000.00000
7	Item-08	Karapareddy usha sree	\$5,000.00000	\$20,000.00000
8	Item-05	Akkala Harathi	\$10,000.00000	\$35,000.00000
9	Item-06	D vani	\$5,000.00000	\$4,000.00000
10	Item-07	Dhanasree	\$800.00000	\$2,000.00000
11			\$53,800.00000	\$116,000.00000

#### Reports

1. Go to the app >> click on the reports tab.
2. Click New Report.
3. Select report type (Billing with Item) 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.

# CRM Application For Jewel Management

**New Billings with Item Report**

	Gold/Silver Price
1	\$1,000.00
2	\$15.00
3	\$100.00
4	\$1,000.00
5	\$15.00
6	\$700.00
7	\$500.00
8	\$1,000.00
9	\$4.00
10	\$2.00
11	<b>\$4,336.00</b>

1. Go to the app >> click on the reports tab.
2. Click New Report.
3. Select report type (Item with Customer Orders) 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.

**New Items with Customer Orders Report**

	Item: Item Id	Customer Order: Customer Order No	Expected Days Of Return	Prices
1	Item-05	Order - 0005	-	Akkala Harathi
2	Item-01	Order - 0001	-	Kavya
3	Item-02	Order - 0002	-	Jampala Hema
4	Item-03	Order - 0003	-	Sandhya
5	Item-04	Order - 0004	-	Nagaradona harshitha
6	Item-06	Order - 0006	-	D vani
7	Item-07	Order - 0007	-	Dhanasree
8	Item-08	Order - 0008	-	Karapareddy usha sree
9	Item-09	Order - 0009	-	Singiri Ushasree
10	Item-10	Order - 0010	-	Nagaradona harshitha

# CRM Application For Jewel Management

## 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 screenshot shows a Salesforce Lightning CRM dashboard titled 'Jewel Management'. The dashboard has three main components:

- New Items with Prices Report:** A table showing items and their prices.

Item: It...	Prices: Item Price	Prices: Gol...	Prices: Silve...
Item-01	Kavya	\$1.00000k	\$2.00000k
Item-02	Jampala Hema	\$5.00000k	\$15.00000k
Item-03	Sandhya	\$7.00000k	\$3.00000k
Item-04	Nagaradona harshitha	\$10.00000k	\$15.00000k
Item-05	Akkala Harathi	\$10.00000k	\$35.00000k
Item-06	D vani	\$5.00000k	\$4.00000k
Item-07	Dhanasree	\$800.00000	\$2.00000k
- New Items with Customer Orders Report:** A table showing customer orders and their details.

It...	Customer Order: Custo...	Expected D...	Prices
Item-01	Order - 0001	-	Kavya
Item-02	Order - 0002	-	Jampala Hema
Item-03	Order - 0003	-	Sandhya
Item-04	Order - 0004	-	Nagaradona harshitha
Item-05	Order - 0005	-	Akkala Harathi
- New Billings with Item Report:** A table showing gold and silver prices.

Gold/Silver Price ↑
\$2.00
\$4.00
\$15.00
\$15.00
\$100.00
\$500.00
\$700.00

## **CRM Application For Jewel Management**

### **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}

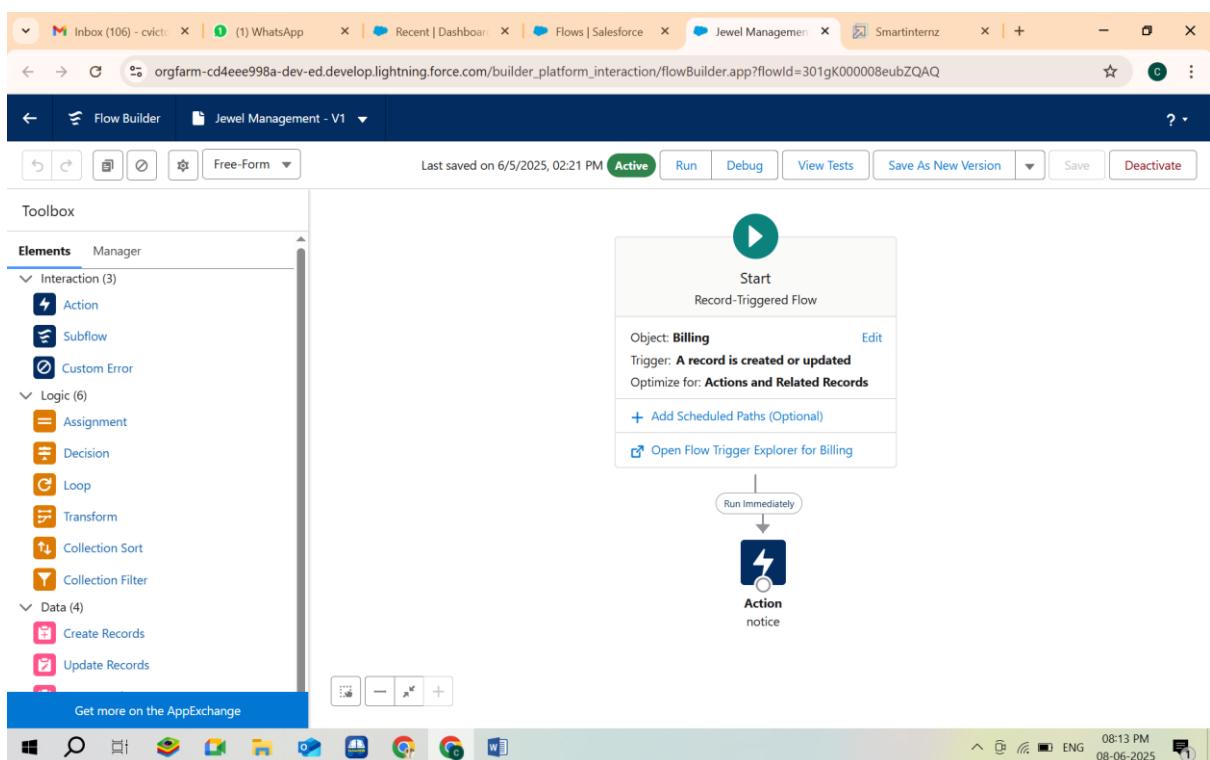
Weight: {!\$Record.Weight\_\_c}grams

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 Management

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 Management

## OUTPUT:

### Jewel Management Tab:

The screenshot shows the 'Jewel Customers' list view. At the top, there are navigation tabs: Jewelry Inventory S..., Jewel Customers, Items, Prices, Customer Orders, Billings, Reports, and Dashboards. Below the tabs, there's a search bar and a toolbar with buttons for New, Import, Change Owner, and Assign Label. A 'Recently Viewed' section is shown with a dropdown menu. The main list displays 10 items, each with a checkbox and a customer name: Kavya, Jampala Hema, Sandhya, Spandhana, Dhanasree, D vani, Singiri Ushasree, Akkala Harathi, Nagaradona harshitha, and Karapareddy usha sree.

### New Jewel Management Details:

The screenshot shows the 'New Jewel Customer' detail page. The title bar says 'New Jewel Customer'. The main form has a 'Information' section with required fields marked with a red asterisk (\*). The fields include: Customer name (Nagaradona harshitha), State (AndhraPradesh), Street (Balajicolon), Country (INDIA), Zip/Postal code (517501), and City (Tirupati). To the right of the form, there's a sidebar with buttons for Change Owner and Assign Label. The background shows a list of recently viewed customers, identical to the one in the previous screenshot.

# CRM Application For Jewel Management

## Items Tab:

The screenshot shows the 'Items' tab in a CRM application. The top navigation bar includes links for 'Jewelry Inventory S...', 'Jewel Customers', 'Items', 'Prices', 'Customer Orders', 'Billings', 'Reports', and 'Dashboards'. A search bar at the top right contains the placeholder 'Search...'. Below the navigation is a section titled 'Recently Viewed' with a dropdown arrow. It displays a list of 10 items, each with a checkbox next to its name: Item-01, Item-02, Item-03, Item-04, Item-05, Item-06, Item-07, Item-08, Item-09, and Item-10. To the right of the list are several small icons for actions like New, Import, Change Owner, and Assign Label. A search bar labeled 'Search this list...' is also present.

## New Item Details:

The screenshot shows a 'New Item: Gold' detail page. The title 'New Item: Gold' is at the top center. Below it is a section titled 'Information' with a note '\* = Required Information'. The form fields include: 'Item Id' (checkbox), 'Customer Name' (dropdown menu showing 'Nagaradona harshitha'), 'Ornament' (text input 'Necklace'), 'Weight' (text input '700.00000'), 'Stone Weight' (text input '5.00000'), and 'Percentage' (text input '50'). On the right side of the form, there are buttons for 'Cancel', 'Save & New', and 'Save'. The background shows the same 'Recently Viewed' list of items as the previous screenshot.

# CRM Application For Jewel Management

## Prices Tab:

The screenshot shows the 'Prices' tab in a CRM application. The top navigation bar includes links for Jewelry Inventory S..., Jewel Customers, Items, Prices (selected), Customer Orders, Billings, Reports, and Dashboards. A search bar at the top right contains the placeholder 'Search...'. Below the navigation is a toolbar with buttons for New, Import, Change Owner, and Assign Label. A 'Recently Viewed' section displays a list of 10 items, each with a checkbox and a name: Dhanasree, D vani, Kavya, Spandhana, Singiri Ushasree, Jampala Hema, Sandhya, Karapareddy usha sree, Akkala Harathi, and Nagaradona harshitha. A message at the top indicates '10 items • Updated a few seconds ago'. To the right of the list is a search bar labeled 'Search this list...' and a set of filter and sort icons.

## New Price Tab Details:

The screenshot shows the 'New Price' dialog box. The title bar says 'New Price'. The left sidebar shows the same 'Recently Viewed' list of 10 items as the previous screen. The main form has a 'Required Information' section with three fields: 'Item Price' (Nagaradona harshitha), 'Silver Price' (\$1,500.00000), and 'Gold Price' (\$1,400.00000). To the right of the form is a 'Change Owner' and 'Assign Label' section. At the bottom of the dialog are 'Cancel', 'Save & New', and 'Save' buttons.

# CRM Application For Jewel Management

## Customer Orders Tab:

Customer Orders

Recently Viewed

10 items • Updated a few seconds ago

Customer Order No

1 Order - 0010  
2 Order - 0009  
3 Order - 0008  
4 Order - 0007  
5 Order - 0006  
6 Order - 0005  
7 Order - 0004  
8 Order - 0003  
9 Order - 0002  
10 Order - 0001

New Import Assign Label

Search this list...

## New Customer Order Details:

New Customer Order

\* = Required Information

Information

Customer Order No

Customer: Nagaradona harshitha

Item: Item-03

Cancel Save & New Save

10 items • Updated 2 minutes ago

Customer Order No

1 Order - 0010  
2 Order - 0009  
3 Order - 0008  
4 Order - 0007  
5 Order - 0006  
6 Order - 0005  
7 Order - 0004  
8 Order - 0003  
9 Order - 0002  
10 Order - 0001

Import Assign Label

# CRM Application For Jewel Management

## Billings Tab:

The screenshot shows the Billings tab in a CRM application. The top navigation bar includes links for Jewelry Inventory S..., Jewel Customers, Items, Prices, Customer Orders, Billings (which is the active tab), Reports, and Dashboards. Below the navigation is a search bar and a toolbar with options like New, Import, Change Owner, and Assign Label. A "Recently Viewed" section lists 10 items, each with a checkbox and a name: Nagaradona harshitha, Singiri Ushasree, Karapareddy usha sree, Dhanasree, D vani, Sandhya, Jampala Hema, Nagaradona harshitha, Kavya, and Akkala Harathi. A message at the bottom indicates the list was updated a few seconds ago.

## New Billing Tab Details:

The screenshot shows the "New Billing" dialog box. The title bar says "New Billing". The "Information" section contains fields for "Billing Name" (Nagaradona harshitha), "Item" (Item-01), and "Paid Amount" (\$1,000). A note indicates that the "Billing Name" field is required. The dialog has "Cancel", "Save & New", and "Save" buttons at the bottom. The background shows the same Billings list as the previous screenshot, with the "Recently Viewed" section showing the same 10 items.

# CRM Application For Jewel Management

## Reports Tab:

The screenshot shows the 'Reports' tab in a CRM application. The left sidebar lists categories: 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'Folders', 'All Folders', 'Created by Me', 'Shared with Me', and 'Favorites', 'All Favorites'. The main area displays a table of recent reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. Three reports are listed:

Report Name	Description	Folder	Created By	Created On	Subscribed
New Items with Customer Orders Report		Private Reports	victorjoy chokka	6/5/2025, 12:06 AM	
New Billings with Item Report		Private Reports	victorjoy chokka	6/4/2025, 11:28 PM	
New Items with Prices Report		Private Reports	victorjoy chokka	6/5/2025, 12:08 AM	

## New Reports Tab Details:

The screenshot shows the 'New Reports Tab' for a specific report titled 'New Items with Customer Orders Report'. The top bar includes a search field, navigation icons, and tabs for Reports, Dashboards, and a pen icon. The main area shows the report title and a table of data.

Total Records: 10

Item: Item Id	Customer Order: Customer Order No	Expected Days Of Return	Prices
1 Item-05	Order - 0005	-	Akkala Harathi
2 Item-01	Order - 0001	-	Kavya
3 Item-02	Order - 0002	-	Jampala Hema
4 Item-03	Order - 0003	-	Sandhya
5 Item-04	Order - 0004	-	Nagaradona harshitha
6 Item-06	Order - 0006	-	D vani
7 Item-07	Order - 0007	-	Dhanasree
8 Item-08	Order - 0008	-	Karapareddy usha sree
9 Item-09	Order - 0009	-	Singiri Ushasree
10 Item-10	Order - 0010	-	Nagaradona harshitha

# CRM Application For Jewel Management

## Dashboards Tab:

The screenshot shows the 'Dashboards' tab in the CRM application. The top navigation bar includes links for Jewelry Inventory S..., Jewel Customers, Items, Prices, Customer Orders, Billings, Reports, and Dashboards. A search bar and various icons are also present. The main area displays a table titled 'Recent' with columns for Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. One entry is visible: 'Jewel Management' (Private Dashboards, created by victorjoy chokka on 6/5/2025, 12:10 AM). On the left, a sidebar lists categories like 'Recent', 'Created by Me', 'Private Dashboards', 'All Dashboards', 'Folders', 'All Folders', 'Created by Me', 'Shared with Me', 'Favorites', and 'All Favorites'.

## New Dashboards Details:

The screenshot shows a specific dashboard titled 'Jewel Management'. The top navigation bar and sidebar are identical to the previous screenshot. The dashboard itself has a title 'Dashboard Jewel Management' and a note 'Last refreshed 6 days ago. Refresh this dashboard to see the latest data.' It also shows the date 'As of Jun 5, 2025, 12:15 AM Viewing as victorjoy chokka'. Below the title, there are three report cards: 'New Items with Prices Report' (listing items like Kavya, Jampala Hema, Sandhya, etc. with their prices), 'New Items with Customer Orders Report' (listing orders like Order - 0001, Order - 0002, etc. with their details), and 'New Billings with Item Report' (listing gold/silver prices from \$2.00 to \$700.00). Each report card includes a 'View Report' link at the bottom.