

## **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>

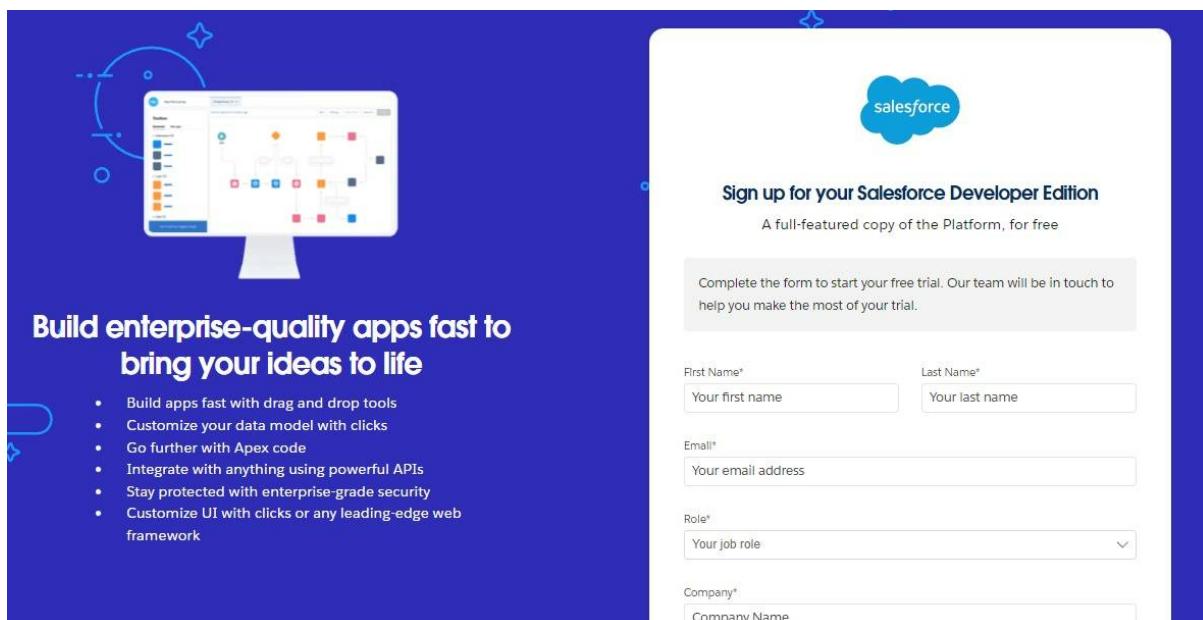
# CRM Application For Jewel Management

## 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 :

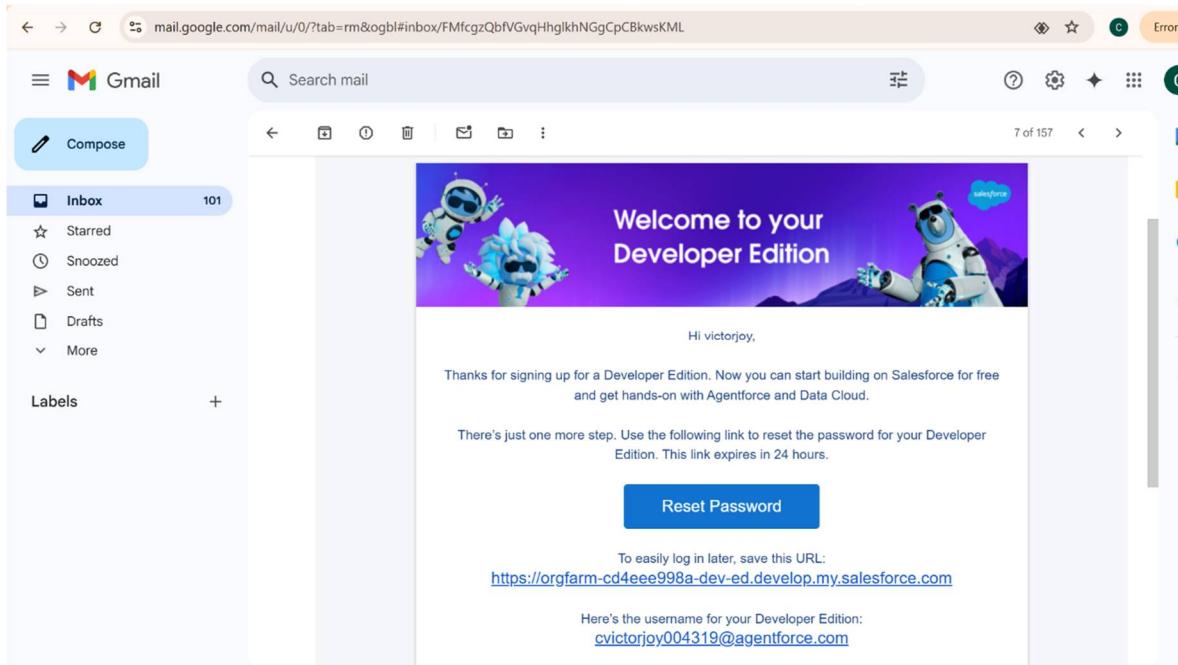


1. **First name** : Chokka
2. **Last name** : Victorjoy
3. **Email** : cvictorjoy004@gmail.com
4. **Role** : Developer
5. **Company** : Gayatri degree college-Tirupati
6. **County** : India
7. **Postal Code** : 517501
8. **Username** : victorjoy004319@agentforce.com

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## Account Activation

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



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

A screenshot of a 'Change Your Password' page. At the top, it says 'Change Your Password'. Below that, it asks 'Enter a new password for lead@sb.com. Make sure to include at least:'. There are four checked requirements: '8 characters', '1 letter', '1 number', and '1 symbol'. The form has three input fields: 'New Password' (containing 'Good'), 'Confirm New Password' (containing 'Match'), and 'Answer' (containing 'asdfghjk!'). A red box highlights the 'Change Password' button at the bottom.

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

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The screenshot shows the Salesforce Setup Home page. The left sidebar is titled "Setup" and includes links for "Quick Find", "Setup Home", "Service Setup Assistant", "Multi-Factor Authentication Assistant", "Release Updates", "Lightning Experience Transition Assistant", "Salesforce Mobile App", "Lightning Usage", and "Optimizer". Under "ADMINISTRATION", there is a link for "Users". The main content area is titled "SETUP Home" and features three cards: "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative Docs". Each card has a "Get Started" button.

# CRM Application For Jewel Management

## MILESTONE-2

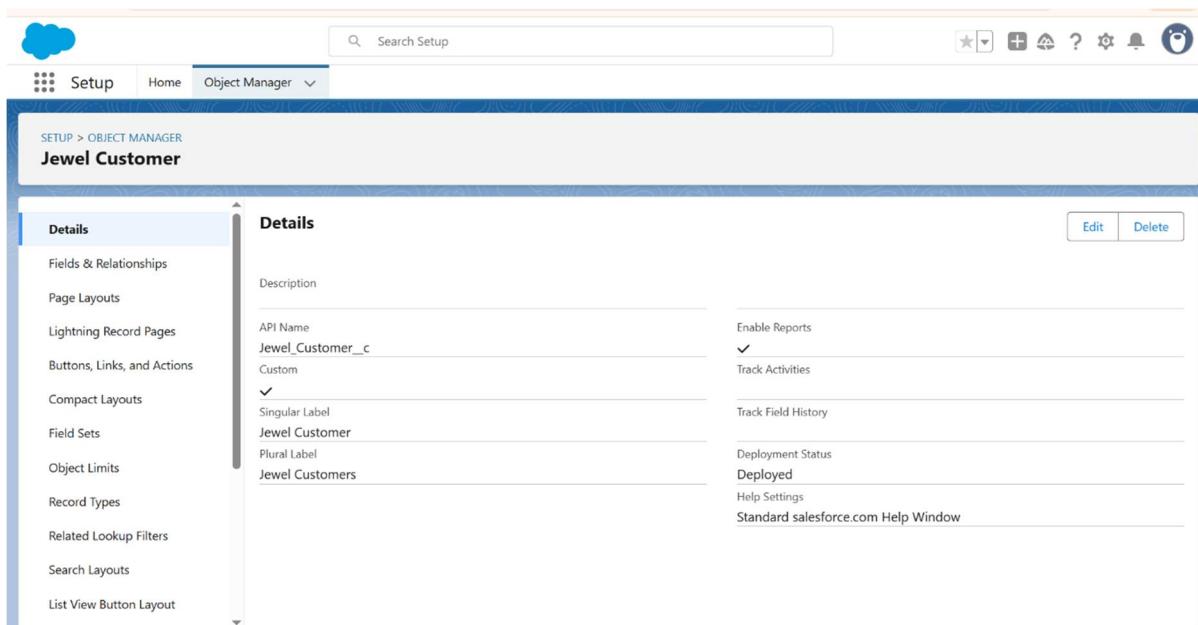
### Object

#### 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

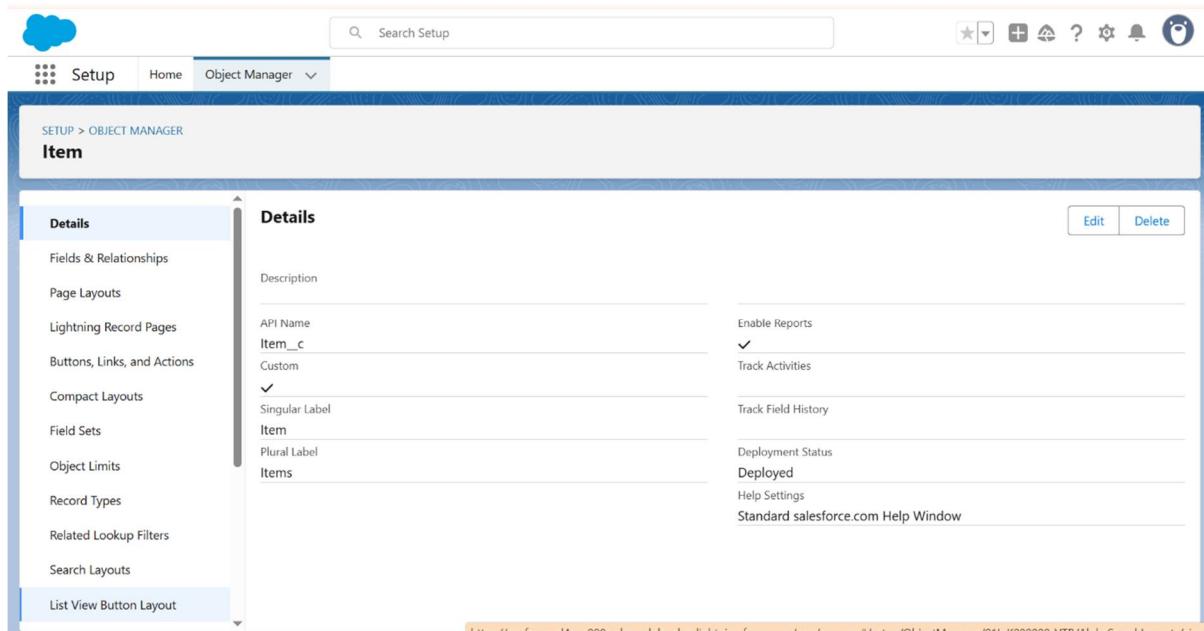
The purpose of creating a Item object is to manage the inventory of gold and silver items.

To create an object:

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

## CRM Application For Jewel Management

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.

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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, cloud, 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' section is expanded, showing fields such as 'API Name' (Customer\_Order\_\_c), 'Custom' (selected), 'Singular Label' (Customer Order), and 'Plural Label' (Customer Orders). On the right, there are sections for 'Edit' and 'Delete' buttons, 'Enable Reports' (checked), 'Track Activities', 'Track Field History', 'Deployment Status' (Deployed), 'Help Settings', and '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.

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The screenshot shows the Salesforce Setup interface. At the top, there's a blue header bar with a cloud icon, the word "Setup", "Home", and "Object Manager". A search bar says "Search Setup" and there are various icons on the right. Below the header, the title "SETUP > OBJECT MANAGER" and the object name "Price" are displayed. On the left, a sidebar lists various setup categories like "Fields & Relationships", "Page Layouts", etc. The main area is titled "Details" and contains fields for "Description", "API Name" (set to "Price\_c"), "Custom" (set to "✓"), "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"). Below these are "Help Settings" and a link to "Standard salesforce.com Help Window". At the bottom right 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 options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main 'Details' section shows the API Name as 'Billing\_\_c', which is custom and singularly labeled 'Billing'. It also shows the plural label 'Billings'. Other settings include enabling reports (checked), tracking activities, tracking field history, and a deployment status of 'Deployed'. Help settings point to the standard Salesforce help window.

Details	
Description	
API Name	Billing__c
Custom	✓
Singular Label	Billing
Plural Label	Billings
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

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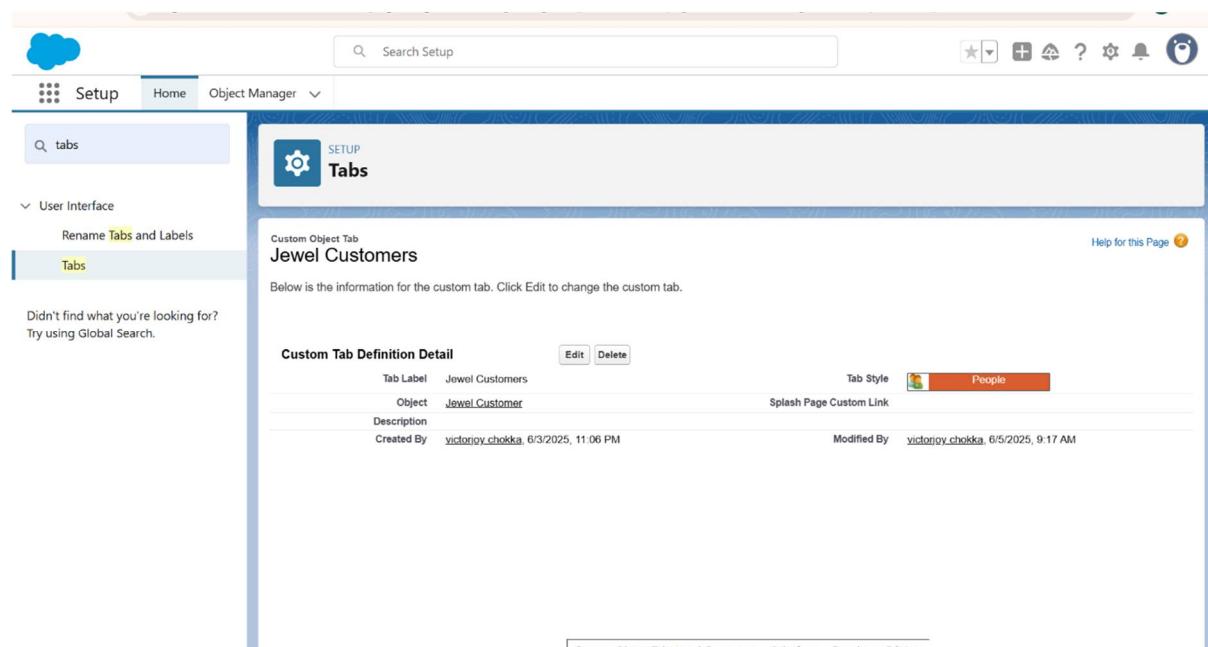
## MILESTONE-3

### Tabs

#### Creating a Custom Tab

To create a Tab:(Customer)

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



#### 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 left sidebar is collapsed, and the main content area is titled "Custom 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 | Pages | Jewelry Inventory System | Help

**App Settings**

**App Details & Branding**

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Details & Branding

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

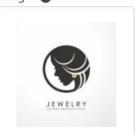
**App Details**

\* 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 Setup interface for creating a custom field. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Jewel Customer'. On the left, a sidebar lists various object settings like Page Layouts, Lightning Record Pages, Buttons, etc. The main content area is titled 'Customer' under 'Jewel Customer Custom Field'. It shows the 'Custom Field Definition Detail' with the following details:

- Field Information:** Field Label: Customer, Field Name: Customer, API Name: Customer\_\_c, Description: Help Text, Data Owner: [redacted].
- Validation Rules:** [empty]
- Created By:** victorjoy\_chokka, 6/5/2025, 8:55 PM
- Modified By:** victorjoy\_chokka, 6/5/2025, 8:55 PM
- Lookup Options:** Related To: Jewel Customer, Related List Label: Jewel Customers, Child Relationship Name: Jewel\_Customers, Required: checked.

A note at the bottom says 'What to do if the lookup record Clear the value of this field.'

#### Creating a Master-Detail Relationship

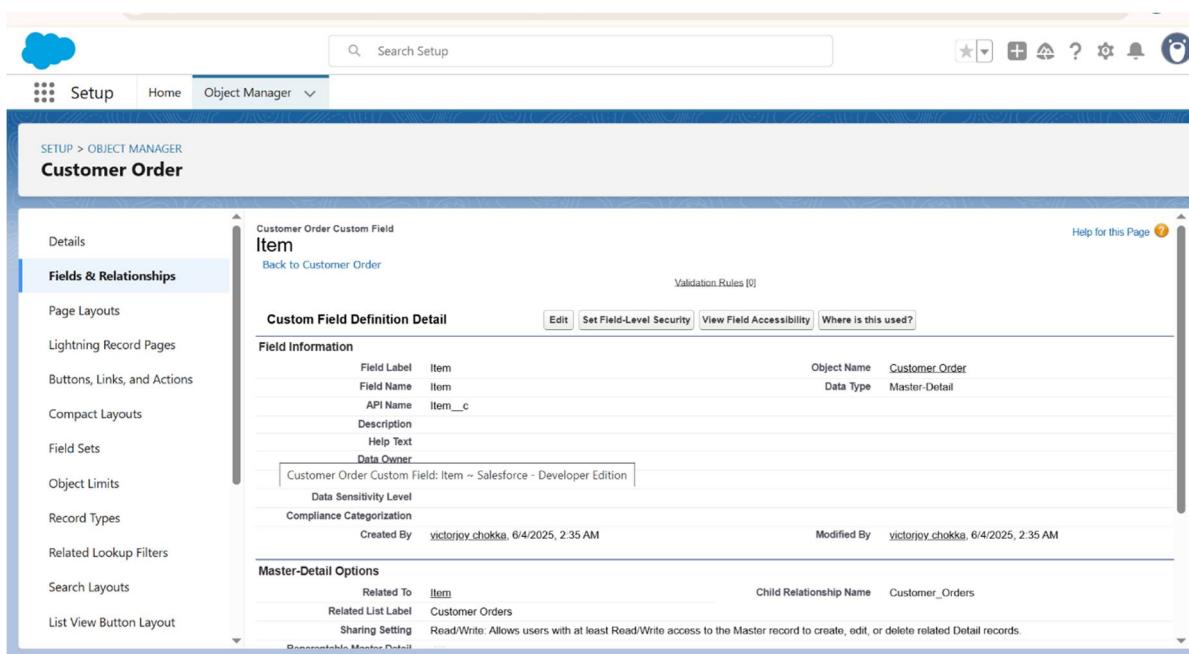
Master-detail relationship is a type of relationship between two objects where the master object controls certain behaviours and settings of the detail object. Here are a few use cases that demonstrate the use of master-detail relationships

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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 Object Manager interface. The top navigation bar includes a cloud icon, 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Jewel Customer'. On the left, a sidebar lists various setup options under 'Fields & Relationships'. The main content area displays the 'Custom Field Definition Detail' for a field named 'City'. The field information includes:

- Field Label: City
- Field Name: City
- API Name: City\_\_c
- Description: Help Text
- Data Owner: Field Usage
- Data Sensitivity Level: Compliance Categorization
- Created By: victorjoy.chokka, 6/3/2025, 11:27 PM
- Modified By: victorjoy.chokka, 6/3/2025, 11:27 PM

General Options include Required (unchecked), Unique (unchecked), and Case Sensitive (unchecked). Buttons at the top right of the detail page include 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. A 'Help for this Page' link is also present.

### 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 has 'Fields & Relationships' selected. The main area displays the 'Custom Field Definition Detail' for a field named 'Phone'. The 'Field Information' section shows the field label is 'Phone', field name is 'Phone', API name is 'Phone\_c', and data type is 'Phone'. The 'General Options' section shows 'Required' is unchecked. The page includes a navigation bar at the top with tabs like 'Setup', 'Home', and 'Object Manager'.

## 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.

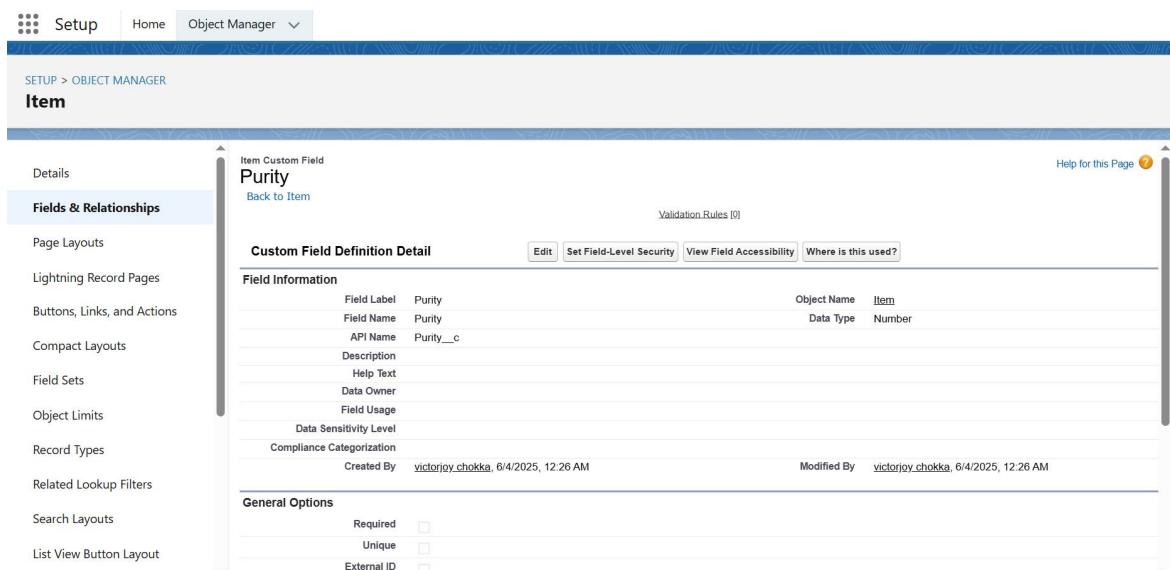
The screenshot shows the Salesforce Object Manager interface. The left sidebar has 'Fields & Relationships' selected. The main area displays the 'Custom Field Definition Detail' for a field named 'Email'. The 'Field Information' section shows the field label is 'Email', field name is 'Email', API name is 'Email\_c', and data type is 'Email'. The 'General Options' section shows 'Required' is unchecked. The page includes a navigation bar at the top with tabs like 'Setup', 'Home', and 'Object Manager'.

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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 section for the 'Item' object. A custom field named 'Item Type' is being created. The 'Field Label' is set to 'Item Type', 'Field Name' to 'Item\_Type', and 'API Name' to 'Item\_Type\_\_c'. The data type is specified as 'Picklist'. The 'General Options' section indicates that the field is required. The 'Created By' field shows 'victorjoy.chokka' and the 'Modified By' field also shows 'victorjoy.chokka'.

## 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 section for the 'Price' object. A custom field named 'Gold Price' is being created. The 'Field Label' is set to 'Gold Price', 'Field Name' to 'Gold\_Price', and 'API Name' to 'Gold\_Price\_\_c'. The data type is specified as 'Currency'. The 'General Options' section indicates that the field is required. The 'Created By' field shows 'victorjoy.chokka' and the 'Modified By' field also shows 'victorjoy.chokka'.

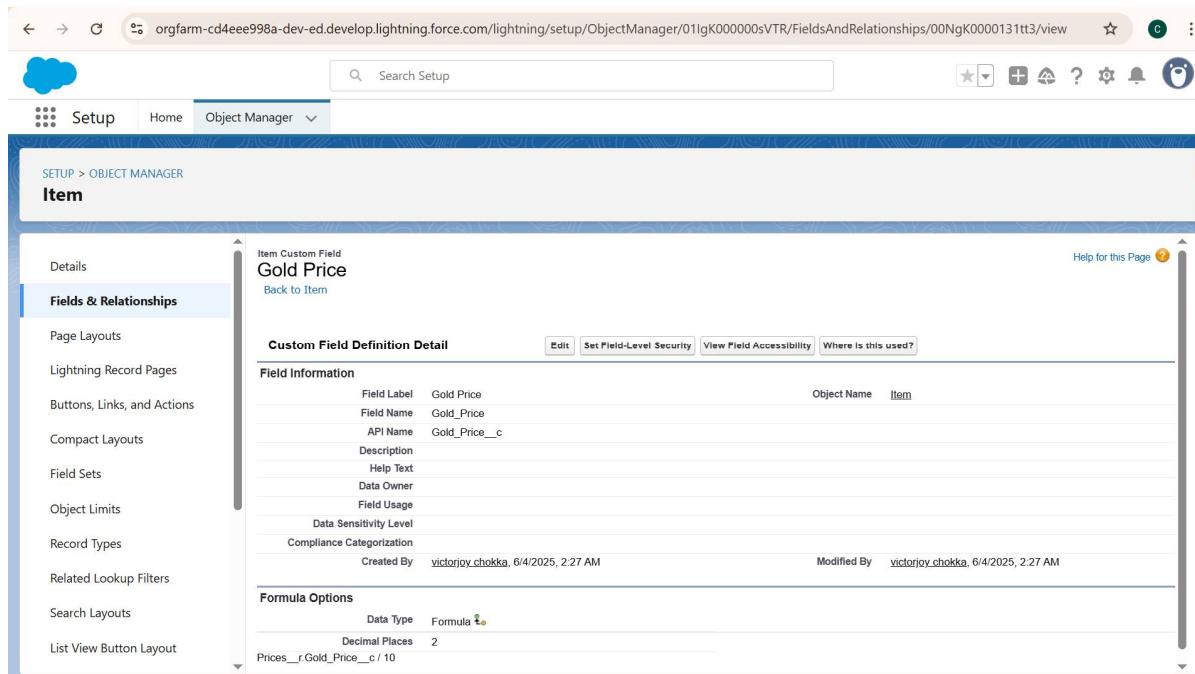
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## Creating Formula Field(Cross Object) in Item Object

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.



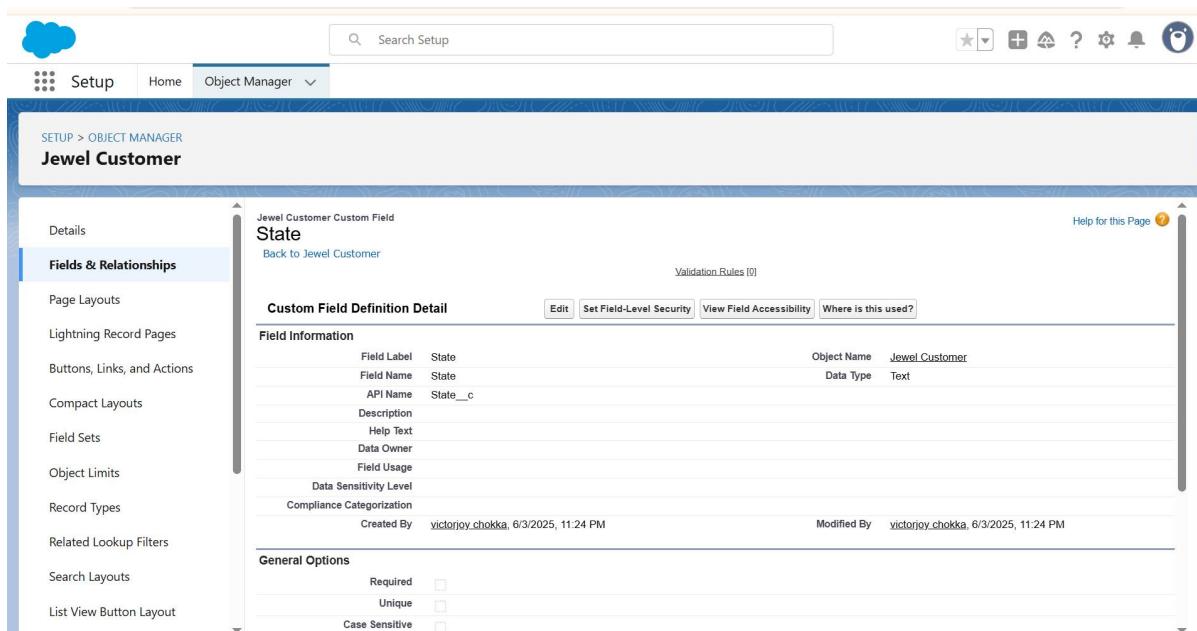
## Creating Text Field in Jewel Customer Object

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, etc. The main content area displays a 'Custom Field Definition Detail' for a field named 'Street'. The 'Field Information' section shows the following details:

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

The 'General Options' section includes 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:
  - 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 left sidebar is titled 'Fields & Relationships' and lists various layout types. The main content area is titled 'Jewel Customer Custom Field' and 'Country'. It displays the 'Custom Field Definition Detail' page for the 'Country' field. The 'Field Information' section shows the field label 'Country', field name 'Country', API name 'Country\_\_c', data type 'Text', and object name 'Jewel Customer'. The 'General Options' section includes checkboxes for 'Required', 'Unique', and 'Case Sensitive'. Navigation links include 'Back to Jewel Customer', 'Validation Rules [0]', 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. A help link 'Help for this Page' 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: Zip/Postal code
  - o Length : 6
  - o Field Name : gets auto generated

Click on Next >> Next >> Save and new

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The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Jewel Customer' and shows a 'Custom Field Definition Detail' for 'Zip/Postal code'. The 'Field Information' section includes fields for Field Label ('Zip/Postal code'), Field Name ('Zip\_Postal\_code'), API Name ('Zip\_Postal\_code\_c'), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By ('victorjoy.chokka, 6/3/2025, 11:26 PM'), and Modified By ('victorjoy.chokka, 6/3/2025, 11:26 PM'). The 'General Options' section includes checkboxes for Required, Unique, and Case Sensitive.

## 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 Object Manager interface. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Price' and shows a 'Custom Field Definition Detail' for 'Silver Price'. The 'Field Information' section includes fields for Field Label ('Silver Price'), Field Name ('Silver\_Price'), API Name ('Silver\_Price\_c'), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By ('victorjoy.chokka, 6/3/2025, 11:30 PM'), and Modified By ('victorjoy.chokka, 6/3/2025, 11:30 PM'). The 'General Options' section includes checkboxes for Required and Default Value.

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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 Object Manager interface. The left sidebar is titled 'Object Manager' and lists various customization options: Details, Fields & Relationships (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 is titled 'Customer Name' and shows the 'Custom Field Definition Detail' for the 'Customer Name' field. The 'Field Information' section displays the following details:

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

Below this, there is a note: 'Item Custom Field: Customer Name ~ Salesforce - Developer Edition'. The 'Lookup Options' section shows the following settings:

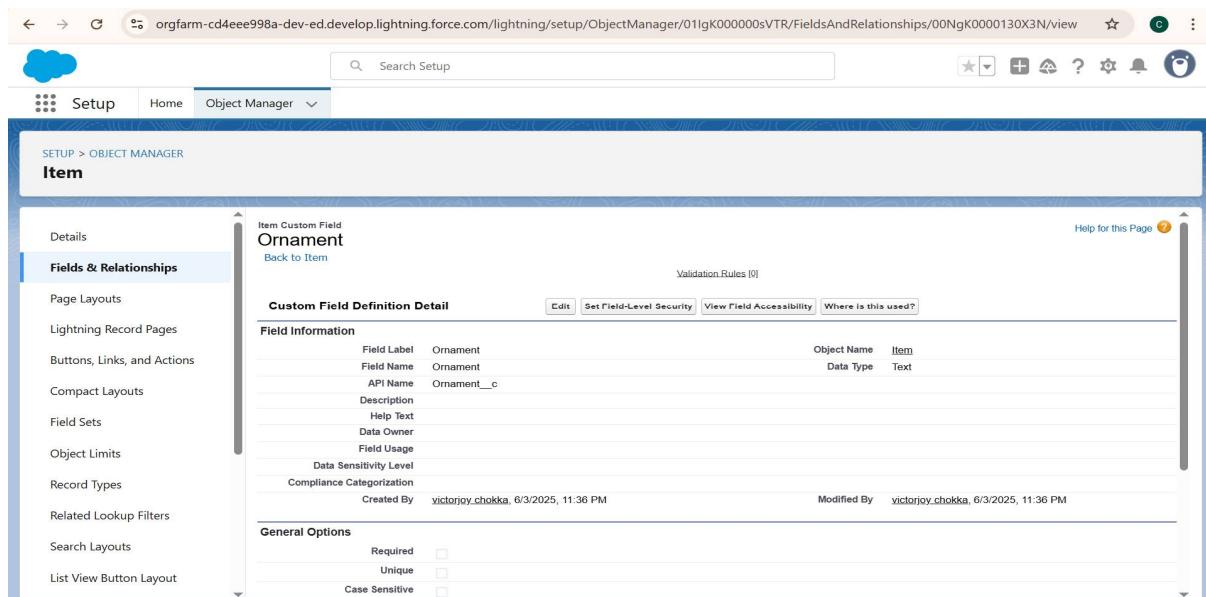
Related To	Jewel Customer	Child Relationship Name	Items
Related List Label	Items		
Required	<input type="checkbox"/>		

## 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.

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'FIELDS & RELATIONSHIPS' and lists various options like Page Layouts, Lightning Record Pages, Buttons, etc. The main content area is titled 'Item Custom Field Weight' and shows the 'Custom Field Definition Detail' page. The 'Field Information' section displays the following details:

Field Label	Weight	Object Name	Item
Field Name	Weight	Data Type	Number
API Name	Weight__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	victorjoy_chokka, 6/3/2025, 11:37 PM	Modified By	victorjoy_chokka, 6/3/2025, 11:37 PM

The 'General Options' section includes checkboxes for Required, Unique, and External ID.

### 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.

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'FIELDS & RELATIONSHIPS' and lists various options like Page Layouts, Lightning Record Pages, Buttons, etc. The main content area is titled 'Item Custom Field Stone Weight' and shows the 'Custom Field Definition Detail' page. The 'Field Information' section displays the following details:

Field Label	Stone Weight	Object Name	Item
Field Name	Stone_Weight	Data Type	Number
API Name	Stone_Weight__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	victorjoy_chokka, 6/3/2025, 11:37 PM	Modified By	victorjoy_chokka, 6/3/2025, 11:37 PM

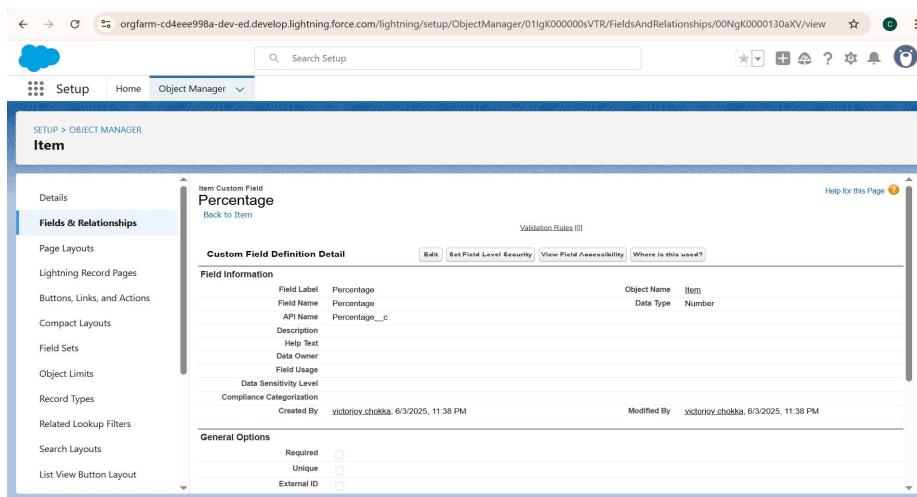
The 'General Options' section includes checkboxes for Required, Unique, and External ID.

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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 " Percentage" and length as " 2 " , Decimal as " 0 ".
5. Field Name will be auto populated, and click on Next >> Next >> Save.



## Creating the number field in Item object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as "Currency" and click Next.
4. Given the Field Label as " Stone/Other Price" and length as " 8 " , Decimal as " 2 ".
5. Field Name will be auto populated, and click on Next >> Next >> Save.

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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'. The 'Field Information' section shows details like Field Label ('Stone/Other Price'), Field Name ('Stone\_Other\_Price'), and API Name ('Stone\_Other\_Price\_c'). The 'General Options' section indicates 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 .

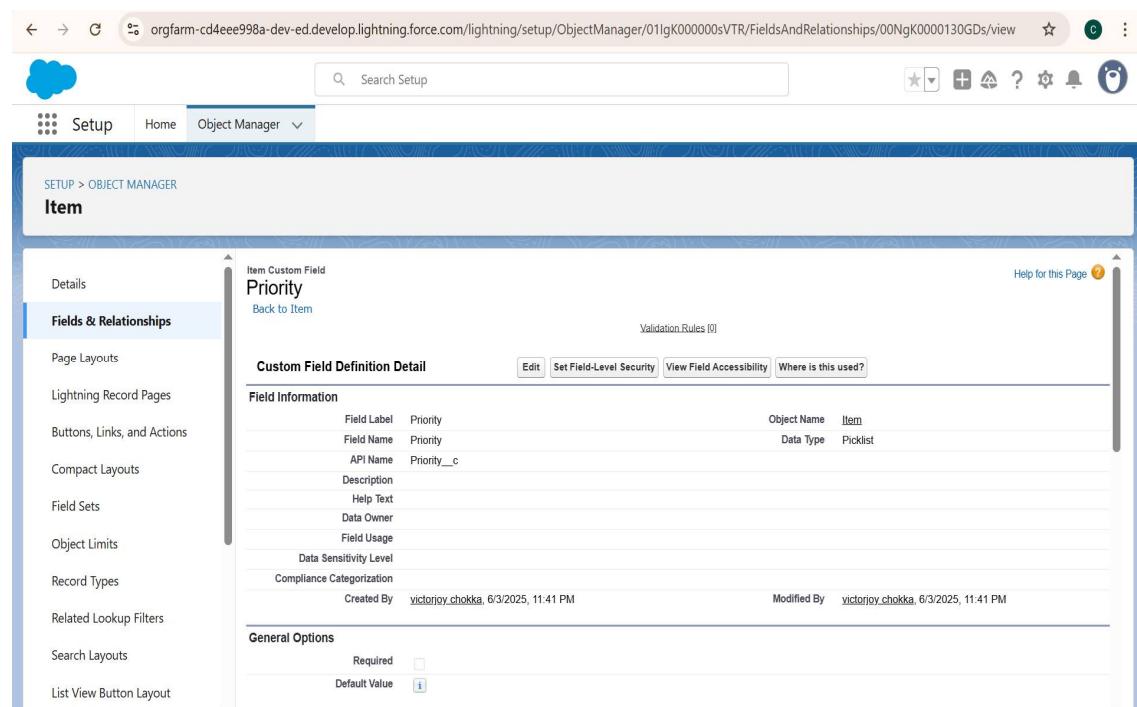
The screenshot shows the Salesforce Setup interface under 'Object Manager'. A custom field named 'Expected Days Of Return' has been created for the 'Item' object. The field is of type 'Picklist'. The 'Field Information' section shows details like Field Label ('Expected Days Of Return'), Field Name ('Expected\_Days\_Of\_Return'), and API Name ('Expected\_Days\_of\_Return\_c'). The 'General Options' section includes a 'Required' checkbox and a 'Default Value' dropdown.

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## Creating Picklist Field in Item Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" ? New.
3. Select Data type as "Picklist" and click Next.
4. Enter Field Label as "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 .

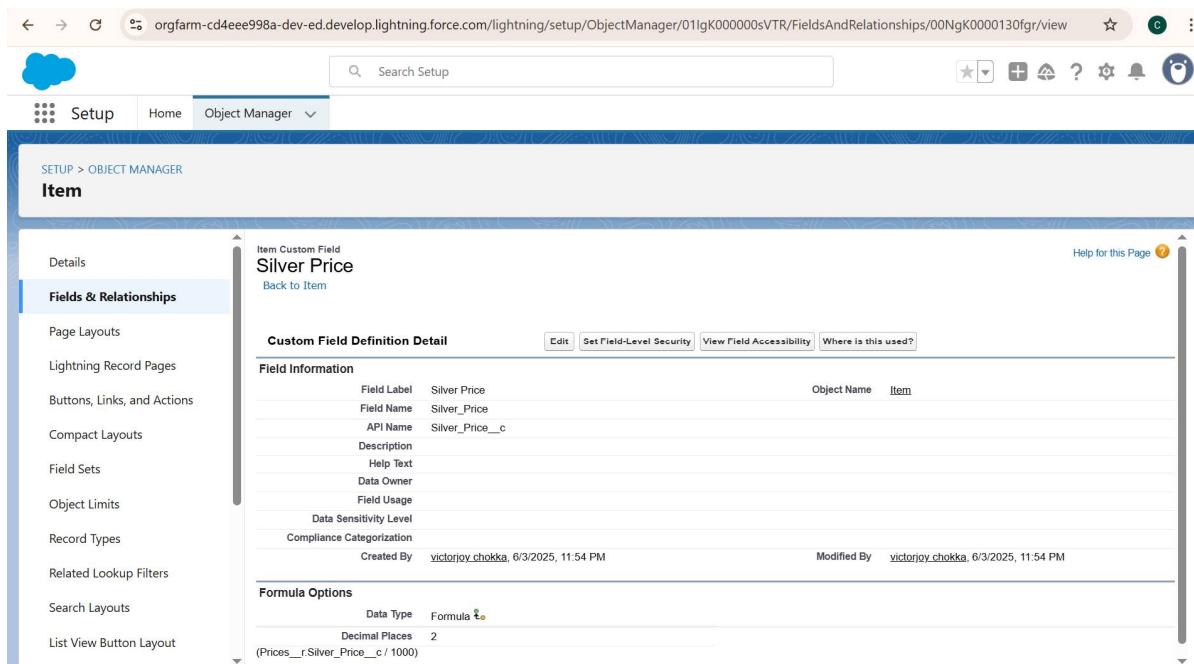


## Creating Formula Field in Item Object

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.

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The screenshot shows the Salesforce Setup interface under 'Object Manager'. A custom field named 'Purity Gold Price' has been created for the 'Item' object. The field information includes:

- Field Label:** Purity Gold Price
- Field Name:** Purity\_Gold\_Price
- API Name:** Purity\_Gold\_Price\_c
- Data Type:** Formula
- Decimal Places:** 2
- Formula:** ((Prices\_\_r.Gold\_Price\_\_c \* Purity\_\_c) / 10)

## 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'. A custom field named 'Total Weight' has been created for the 'Item' object. The field information includes:

- Field Label:** Total Weight
- Field Name:** Total\_Weight
- API Name:** Total\_Weight\_c
- Data Type:** Formula
- Decimal Places:** 3
- Formula:** (Weight\_\_c - Stone\_Weight\_\_c)

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## 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.

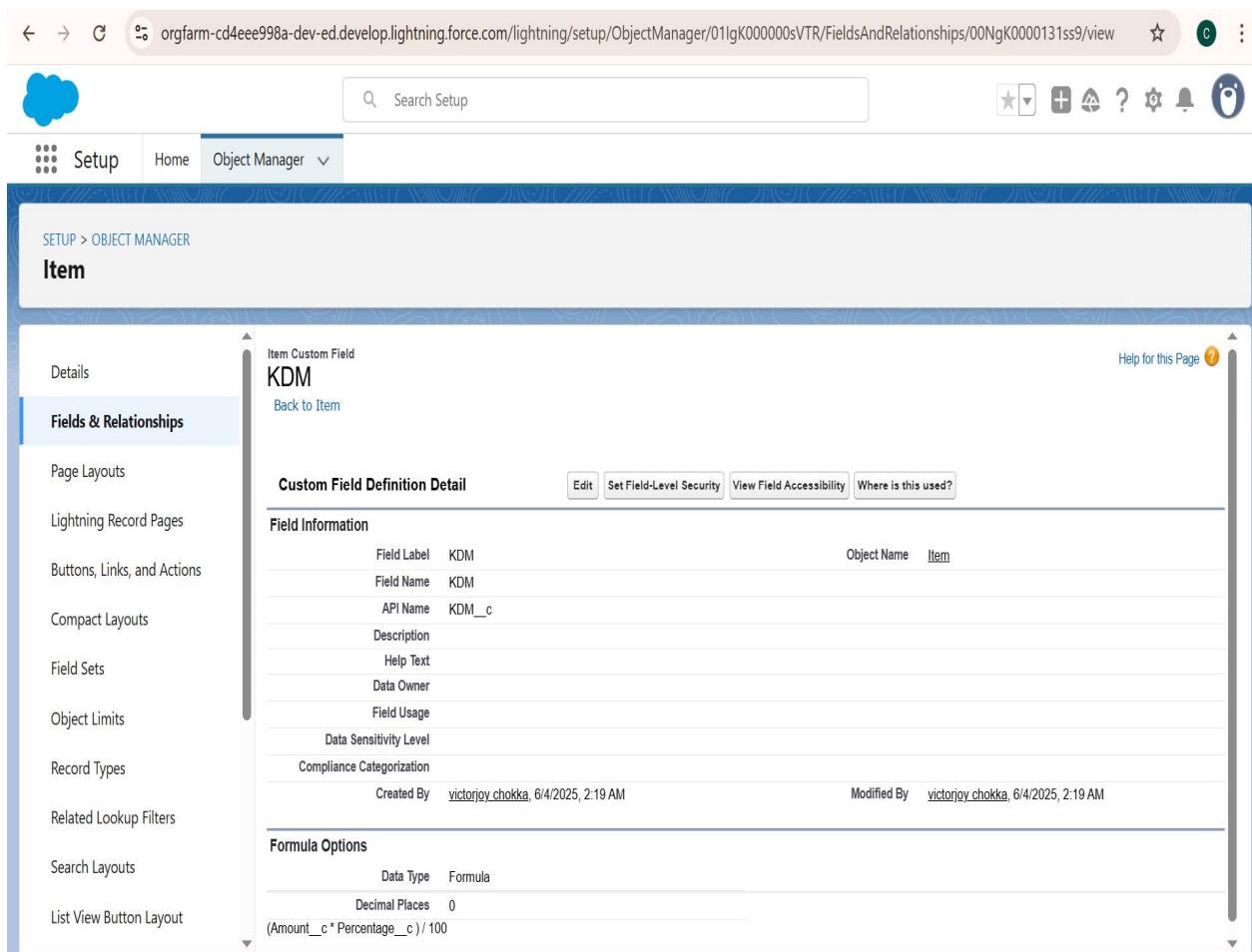
The screenshot shows the Salesforce Setup interface with the following details:

- 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:**
  - Name:** Amount
  - Type:** Item Custom Field
  - Description:** Item Custom Field: Amount ~ Salesforce - Developer Edition
  - Field Options:**
    - Field Label: Amount
    - Field Name: Amount
    - API Name: Amount\_c
    - Description
    - Help Text
    - Data Owner
    - Field Usage
    - Data Sensitivity Level
    - Compliance Categorization
  - 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
  - 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/01gK00000sVTR/FieldsAndRelationships/00NgK0000131ss9/view>. The page title is "SETUP > OBJECT MANAGER" and the object selected is "Item".

The left sidebar shows various setup options like 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 the "Item Custom Field KDM". The "Field Information" section includes:

- Field Label: KDM
- Field Name: KDM
- API Name: KDM\_c
- Description: (Amount\_c \* Percentage\_c) / 100
- Help Text: (Amount\_c \* Percentage\_c) / 100
- Data Owner: (Automatically assigned)
- Field Usage: (Automatically assigned)
- Data Sensitivity Level: (Automatically assigned)
- Compliance Categorization: (Automatically assigned)
- Created By: victorjoy\_chokka, 6/4/2025, 2:19 AM
- Modified By: victorjoy\_chokka, 6/4/2025, 2:19 AM

The "Formula Options" section shows:

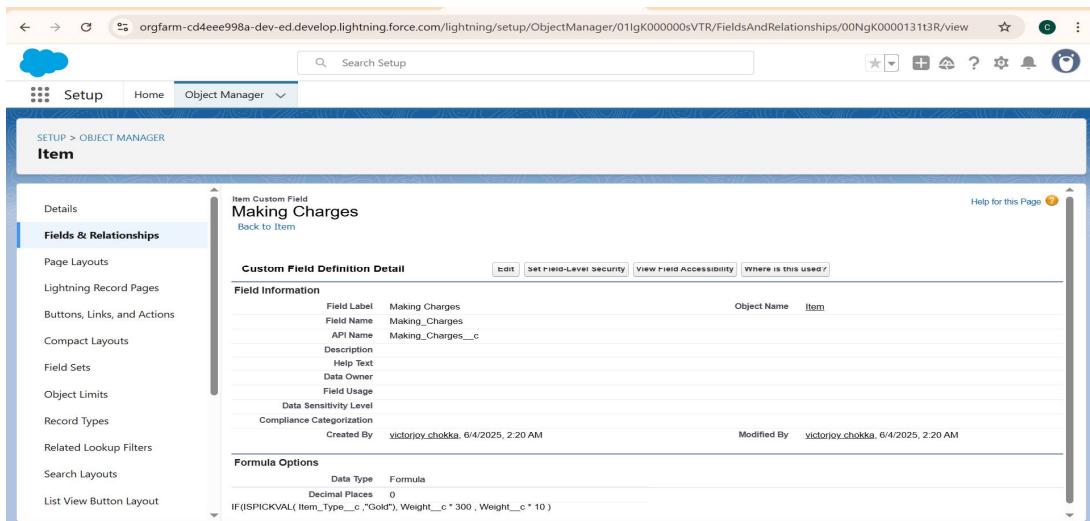
- Data Type: Formula
- Decimal Places: 0
- Formula:  $(\text{Amount\_c} * \text{Percentage\_c}) / 100$

## 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 .

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The screenshot shows the Salesforce Setup page with the 'Object Manager' selected. A custom field named 'Order Status' is being created for the 'Customer Order' object. The field is defined as a picklist type. The 'Field Information' section shows the field label 'Order Status', field name 'Order\_Status', API name 'Order\_Status\_\_c', and object name 'Customer Order'. The 'General Options' section indicates that the field is required. The 'Custom Field Definition Detail' tab is active.

## 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 Setup page with the 'Object Manager' selected. A custom field named 'Item' is being created for the 'Billing' object. The field is defined as a lookup type. The 'Field Information' section shows the field label 'Item', field name 'Item', API name 'Item\_\_c', and object name 'Billing'. The 'Lookup Options' section shows the related to object as 'Item' and the child relationship name as 'Billings'. The 'Custom Field Definition Detail' tab is active.

# 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 Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Billing'. On the left, there's a sidebar with options like 'Details', 'Fields & Relationships' (which is selected), and various layout-related items. The main content area is titled 'Billing Custom Field Ornament' with a 'Back to Billing' link. It shows the 'Custom Field Definition Detail' for 'Ornament'. Key details include:

- Field Information:** Field Label: Ornament, Field Name: Ornament, API Name: Ornament\_\_c, Description: Help Text.
- Help Text:** Billing Custom Field: Ornament ~ Salesforce - Developer Edition.
- 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.
- Formula Options:** Data Type: Formula, Formula: Item\_\_r.Ornament\_\_c.

## 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 'FIELDS & RELATIONSHIPS' under 'Billing'. The main content area displays a 'Custom Field Definition Detail' for a field named 'Stone weight'. The 'Field Information' section shows the field label as 'Stone weight', field name as 'Stone\_weight', and API name as 'Stone\_weight\_\_c'. The 'Formula Options' section indicates the data type is 'Formula' and decimal places are set to 2. The formula itself is 'Item\_\_r.Stone\_Weight\_\_c'. The 'Object Name' is listed as 'Billing'.

### Creating Formula Field in Billing Object

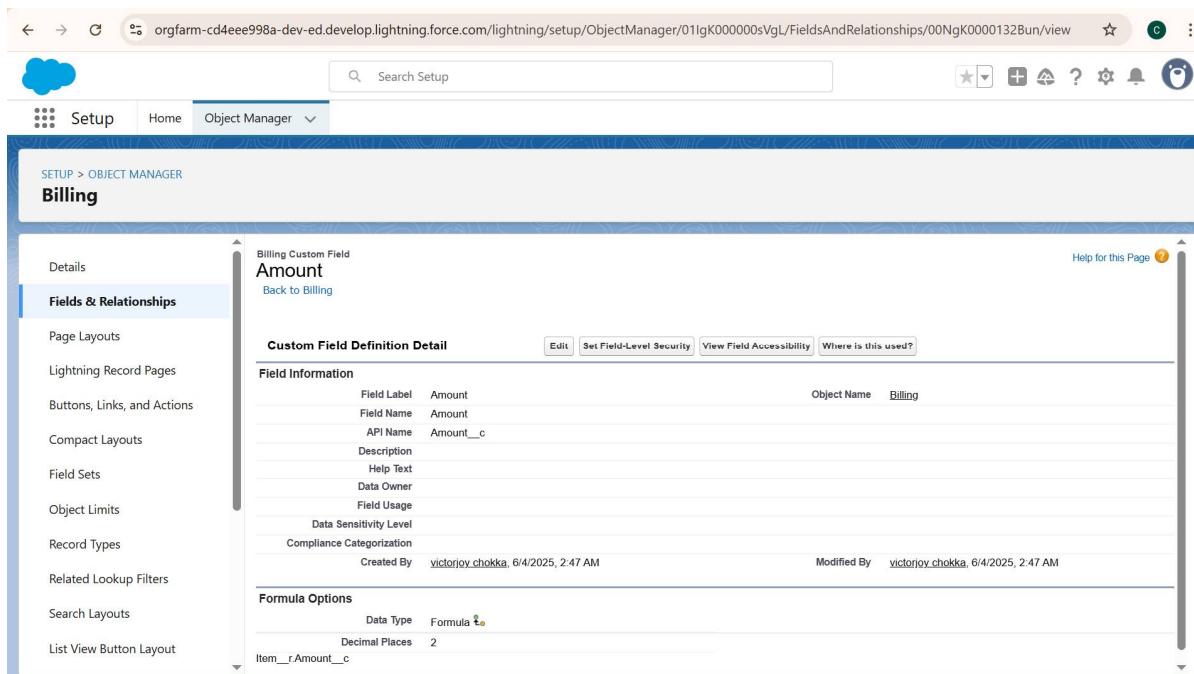
1. Go to setup >> click on Object Manager >> type object name (Billing) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Weight" and select formula return type as "Number" 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 'FIELDS & RELATIONSHIPS' under 'Billing'. The main content area displays a 'Custom Field Definition Detail' for a field named 'Weight'. The 'Field Information' section shows the field label as 'Weight', field name as 'Weight', and API name as 'Weight\_\_c'. The 'Formula Options' section indicates the data type is 'Formula' and decimal places are set to 2. The formula itself is 'Item\_\_r.Total\_Weight\_\_c'. The 'Object Name' is listed as 'Billing'.

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## Creating Formula Field in Billing Object

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

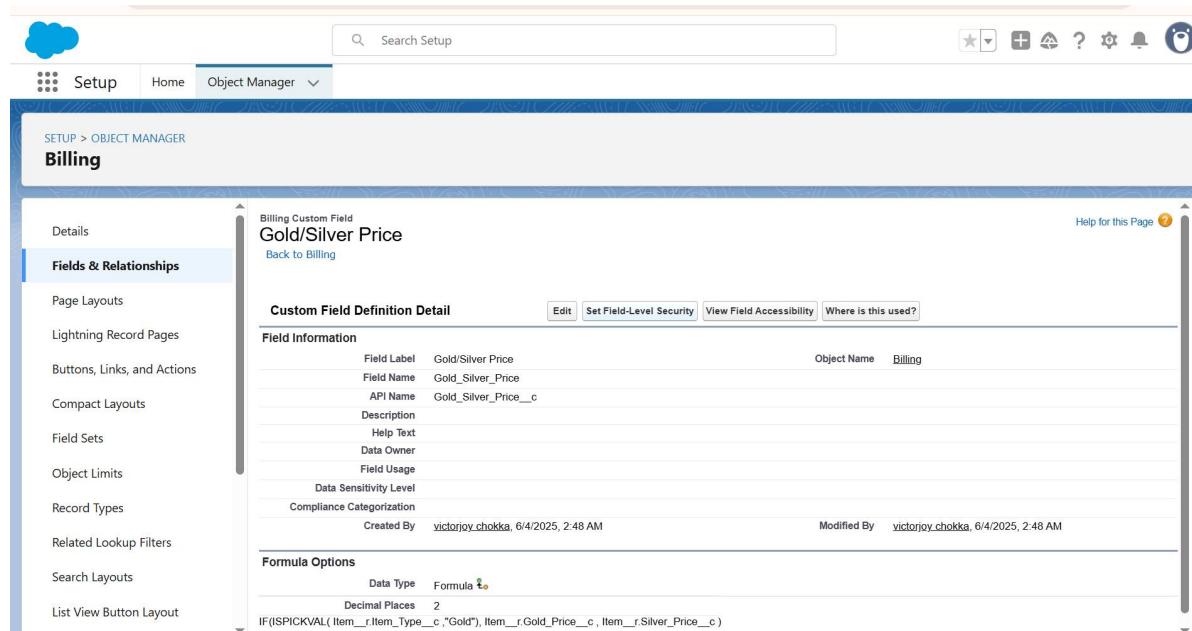
## CRM Application For Jewel Management

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.

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The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Billing' object. A custom field named 'KDM Charge' has been created. The field information includes:

- Field Label:** KDM Charge
- Field Name:** KDM\_Charge
- API Name:** KDM\_Charge\_c
- Description:** Help Text
- Data Type:** Formula
- Decimal Places:** 0

The formula used is `Item__r.KDM__c`.

## 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 Setup interface under the Object Manager for the 'Billing' object. A custom field named 'Making Charges' has been created. The field information includes:

- Field Label:** Making Charges
- Field Name:** Making\_Charges
- API Name:** Making\_Charges\_c
- Description:** Help Text
- Data Type:** Formula
- Decimal Places:** 2

The formula used is `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 Object Manager interface. 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 customization options: 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 'Billing Custom Field' titled 'Stones/other price'. It shows the 'Custom Field Definition Detail' with fields like Field Label (Stones/other price), Field Name (Stones\_other\_price), API Name (Stones\_other\_price\_\_c), and Data Type (Formula). Other details include Object Name (Billing), Description (Help Text), Data Owner (victorjoy.chokka), Field Usage (Data Sensitivity Level), Compliance Categorization (Created By victorjoy.chokka on 6/4/2025, 2:53 AM, Modified By victorjoy.chokka on 6/4/2025, 2:53 AM), and Formula Options (Decimal Places 2, Formula Item\_\_r.Stone\_other\_price\_\_c). A 'Help for this Page' link is also present.

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## Creating Formula Field in Billing Object

1. Go to setup >> click on Object Manager >> type object name (Billing) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "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 in the browser is <https://orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000000sVgL/FieldsAndRelationships/00NgK0000131v0R/view>. The page title is 'Custom Field Definition Detail' for the 'Total Amount' field on the 'Billing' object. The 'Field Information' section shows the field label 'Total Amount', field name 'Total\_Amount', and API name 'Total\_Amount\_c'. The 'Formula Options' section shows the formula 'Amount\_c + KDM\_Charge\_c + Stones\_other\_price\_c + Making\_Charges\_c'. The 'Object Name' is listed as 'Billing'.

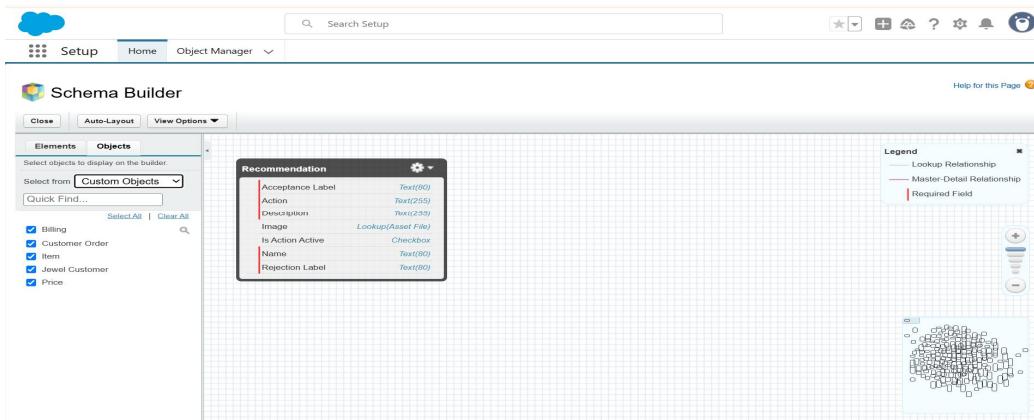
## Schema Builder

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.

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## 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

The screenshot shows the Salesforce Object Manager interface. A custom field named 'Priority' has been created for the 'Item' object. The field is defined as a picklist type with a label 'Priority'. The 'Fields & Relationships' sidebar on the left lists various configuration options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc.

## 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 :-

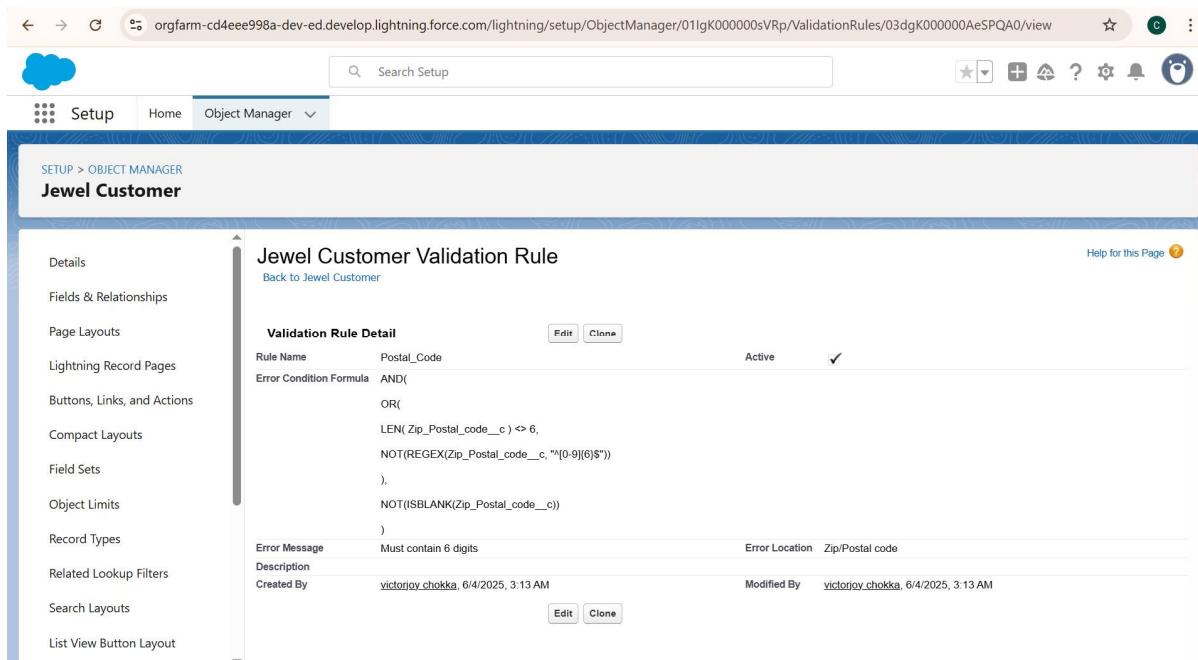
```

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.



### 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'. The rule details are as follows:

Field	Value
Rule Name	ValidationRule_For_JewelCustomerObject
Active	✓
Error Condition Formula	OR( ISBLANK( City__c ), ISBLANK( Country__c ),ISBLANK( Phone__c ),ISBLANK( State__c ),ISBLANK( Street__c ) )
Error Message	Please fill Required fields
Description	
Created By	victorjoy_chokka, 6/4/2025, 3:16 AM
Modified By	victorjoy_chokka, 6/4/2025, 3:16 AM

### 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 the 'Item' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the 'Item Validation Rule' detail page. The page title is 'Item Validation Rule'. It shows a validation rule named 'ValidationRule\_For\_Item' with the 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)). The rule is active and has an error message: 'Please fill Required fields'. The error location is set to 'Top of Page'. The record was created by 'victorjoy\_chokka' on 6/4/2025, 3:18 AM and modified by the same user on the same date and time.

# 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 Home, Object Manager, and a search bar labeled 'Search Setup'. The left sidebar has sections for Users and Profiles, with 'Profiles' currently selected. The main content area is titled 'SETUP Profiles' and displays the 'Gold Smith' profile. It shows the profile's name, user license (Salesforce), and creation details (by victorjoy\_chokka on 6/4/2025 at 3:20 AM). Below this, the 'Profile Detail' section includes buttons for Edit, Clone, Delete, and View Users. The 'Page Layouts' section lists standard object layouts for Global, Email Application, and Home Page Layout, along with their respective global and macro page assignments. A 'Custom Profile' checkbox is checked. At the bottom right, there is a 'Help for this Page' link.

#### 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". The main content area is titled "Worker". It displays a list of permissions and page layouts assigned to this profile. 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 lists three standard object layouts: Global (Global Layout [View Assignment]), Email Application (Not Assigned [View Assignment]), and Home Page Layout (Home Page Default [View Assignment]). The Lead column lists "Lead Layout [View Assignment]" for the Global layout, "Location Layout [View Assignment]" for the Email Application, and "Location Group Layout [View Assignment]" for the Home Page Layout. The Location and Location Group columns are also listed.

# 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.

The screenshot shows the Salesforce Setup Roles page. On the left, there's a sidebar with links like Setup Home, Service Setup Assistant, Commerce Setup Assistant, etc. The main area has a header 'SETUP Roles'. Below it, a section titled 'Role Gold Smith' shows the role details: Label 'Gold Smith', Role Name 'Gold\_Smith', and a note that it reports to 'None'. It also shows the 'Modified By' field as 'victoroy.chokka, 6/4/2025, 3:33 AM'. Under 'Opportunity Access', it says 'Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities'. Under 'Case Access', it says 'Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases'. At the bottom, there's a table titled 'Users in Gold Smith Role' with one row for 'Niklaus Mikaelson'.

#### 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 page includes a sidebar with links like Setup Home, Service Setup Assistant, and Administration. The main content area displays the 'Role Detail' for 'Worker', showing it reports to 'Gold Smith' and was modified by 'victoriroy.chokka' on 6/4/2025. It also lists 'Opportunity Access' and 'Case Access'. Below this, a table shows two users assigned to the 'Worker' role: Kol Mikaelson and Akkala Harathi.

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'. The left sidebar has a tree view with 'Users' selected under 'User Management Settings'. The main content area is titled 'Users' and shows a list of users. One user, 'Niklaus Mikaelson', is selected. The 'User Detail' section shows the following information:

Name	Niklaus Mikaelson	Role	Gold_Smith
Alias	nmika	User License	Salesforce
Email	cvictorjoy04@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="#">i</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 is collapsed, and the main area displays the 'User Detail' section for a user named 'Kol Mikaelson'. The user's details include:

Name	Kol Mikaelson	Role	Worker
Alias	kmika	User License	Salesforce Platform
Email	cvcitorjoy004@gmail.com [Verify]	Profile	Worker
Username	kol@mikaelson.com	Active	<input checked="" type="checkbox"/>
Nickname	mikael	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	<input type="checkbox"/>
Delegated Approver	Data.com User Type	<input type="checkbox"/>	

# 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 titled 'Setup' and includes sections for 'Users', 'Feature Settings', 'Service', and 'Embedded Service'. The 'Users' section is currently selected. The main content area displays the 'User Detail' for a user named 'Akkala Harathi'. The 'User Detail' table contains the following information:

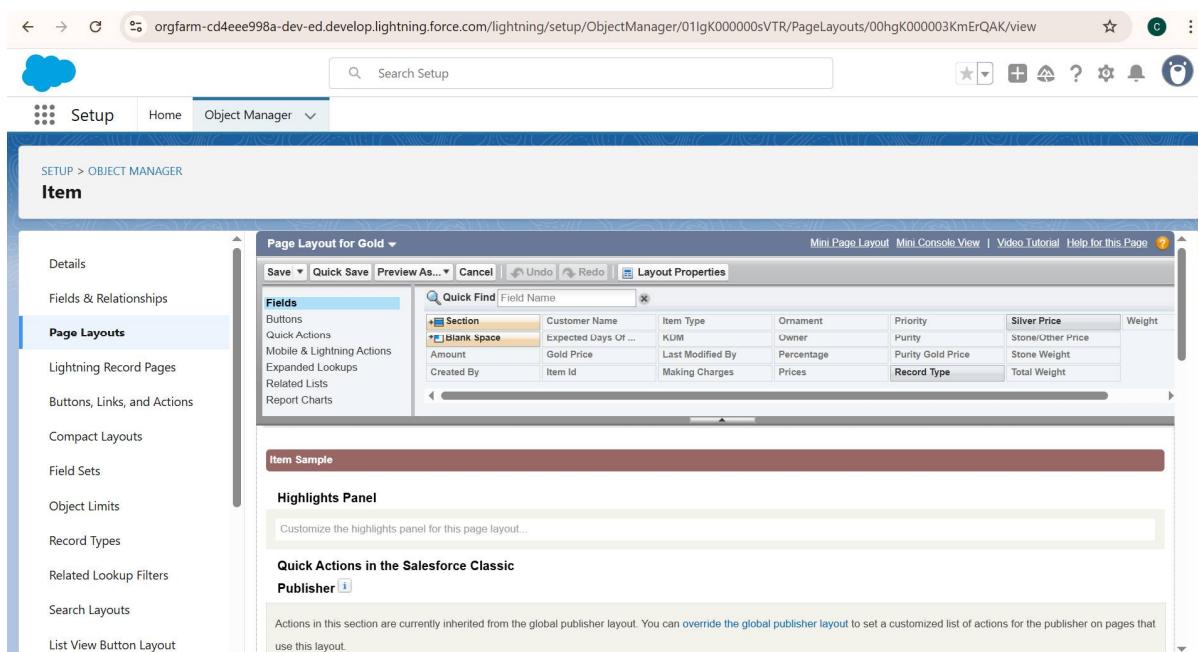
Name	Akkala Harathi	Role	Worker
Alias	ahara	User License	Salesforce Platform
Email	cviatorjoy004@gmail.com [Verify]	Profile	Worker
Username	akkala@harathi.com	Active	<input checked="" type="checkbox"/>
Nickname	harathi	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
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="#">View</a>

# 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 Object Manager interface for creating a new Page Layout. The left sidebar is open, showing the 'Page Layouts' section under 'Object Manager'. The main area is titled 'Page Layout for Silver' and contains a 'Fields' section with a table of fields. The 'Section' and 'Customer Name' fields are visible at the top, while 'Blank Space' and 'Gold Price' are highlighted in orange. Other fields listed include 'Item Type', 'Ornament', 'Priority', 'Silver Price', 'Stone/Other Price', 'Weight', 'Expected Days Of ...', 'KDM', 'Owner', 'Percentage', 'Record Type', 'Total Weight', 'Last Modified By', 'Prices', and 'Making Charges'. Below the table is an 'Item Sample' section, followed by a 'Highlights Panel' and a 'Quick Actions in the Salesforce Classic' section. The top navigation bar includes links for 'Search Setup', 'Layout Properties', and various system icons.

# 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 left sidebar menu is open, with 'Record Types' selected. The main content area displays a record type named 'Gold'. The record details are as follows:

Record Type Label	Gold
Record Type Name	Gold
Namespace Prefix	
Description	Gold items information
Created By	victorjoy_chokka, 6/4/2025, 9:37 PM
Modified By	victorjoy_chokka, 6/4/2025, 9:37 PM

Below the record details, there is a section 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

## 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 for the Object Manager. The left sidebar is titled 'SETUP > OBJECT MANAGER' and contains a list of options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types (which is selected), Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Item' and shows a record type named 'Silver'. The 'Record Type Label' is set to 'Silver'. The status is 'Active' with a checkmark. Below this, there is a table with columns 'Description' and 'Modified Date'. The table contains three rows: 'Expected Days Of Return' (modified 6/4/2025, 9:37 PM), 'Item Type' (modified 6/4/2025, 9:37 PM), and 'Priority' (modified 6/4/2025, 9:37 PM). A 'Help for this Page' link is located in the top right corner of the main content area.

# CRM Application For Jewel Management

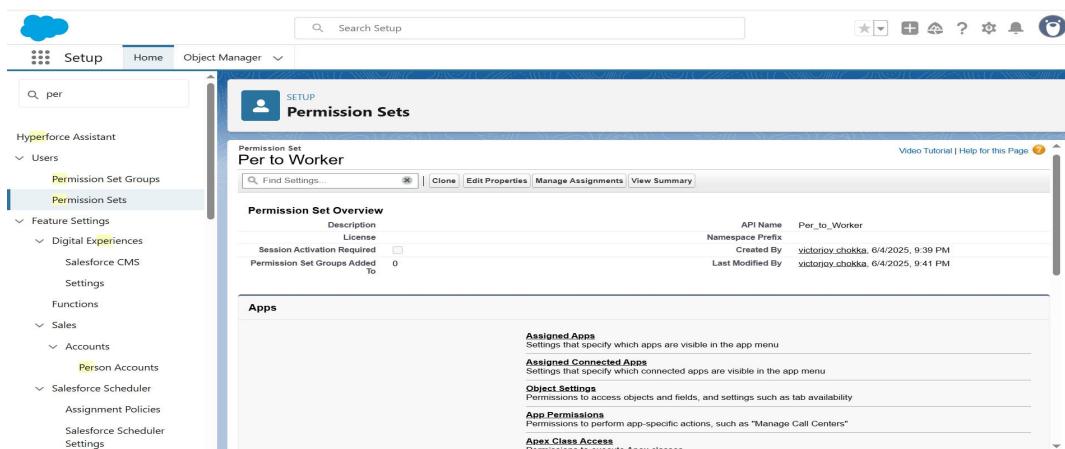
## MILESTONE-11

### 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

## 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);  
    }  
}
```

```
trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {
    if (Trigger.isInsert) {
        UpdatePaid...
    } else if (Trigger.isUpdate) {
        UpdatePaid...
    }
}
```

The screenshot shows the Salesforce Apex Editor with the URL [https://orgfarm-cd4eee998a-dev-ed.develop.my.salesforce.com/\\_ui/common/apex/debug/ApexCSIPage](https://orgfarm-cd4eee998a-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage). The trigger code for `UpdatePaidAmountTrigger.apxt` is displayed. A context menu is open over the line `UpdatePaid...`, showing options like Open, Find, Find All, Copy, Paste, Delete, and Insert. The 'Open' option is highlighted. A tooltip for 'Open' indicates it will open the selected item in the developer console. The 'Entities' tab of the sidebar is selected, showing the trigger's details: Entity Type is 'Triggers', Name is 'UpdatePaidAmountTrig...', and Namespace is 'Billing'. The 'Related' tab shows relationships: 'Billing\_\_c' is an SObject with a reference to the trigger, and 'UpdatePaid...' is an ApexClass with a reference to the trigger.

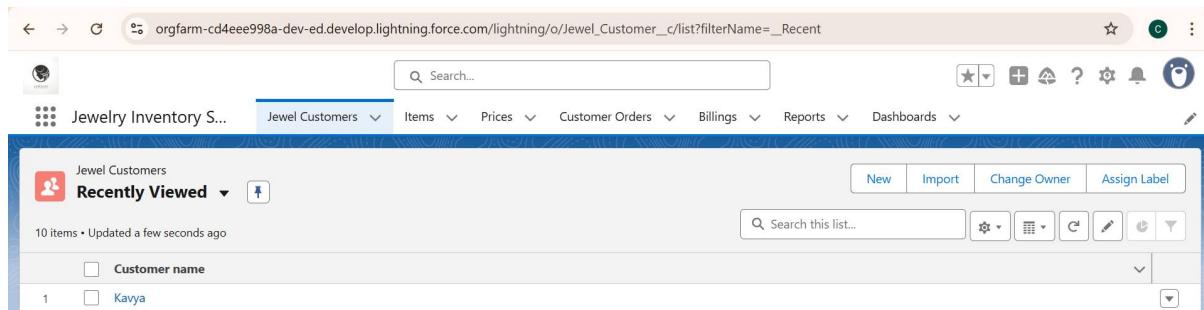
# CRM Application For Jewel Management

## MILESTONE-13

### User Adoption

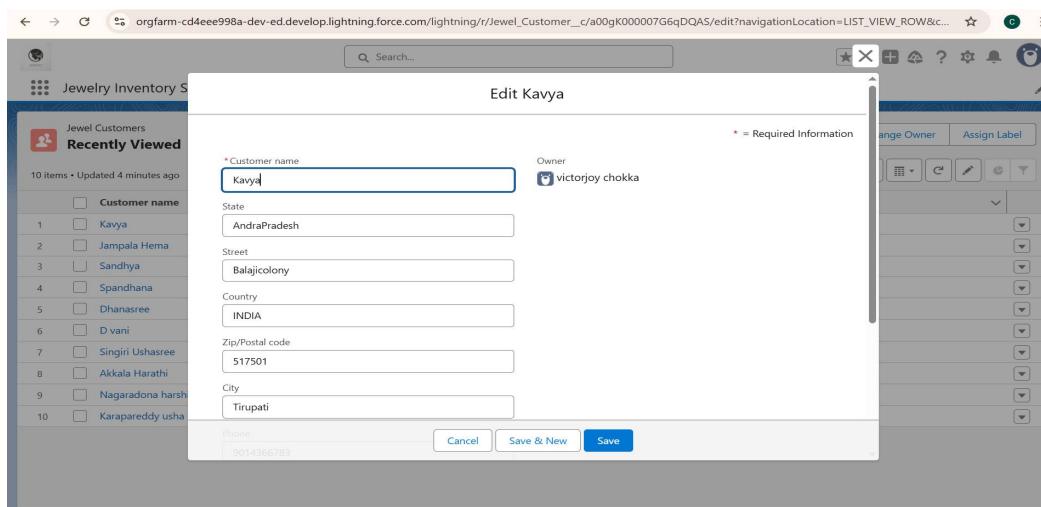
#### Create a Record (Jewel Customer)

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)

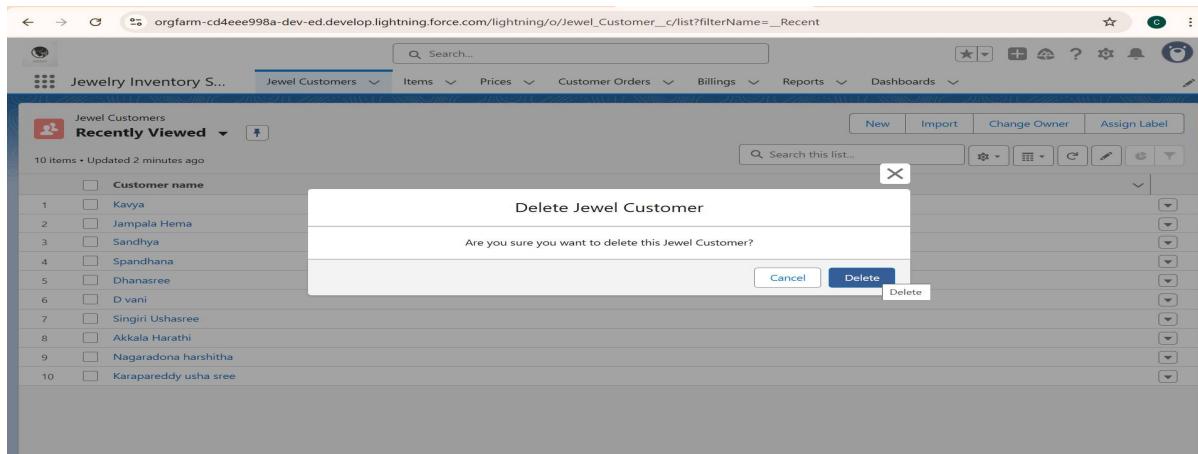
1. Click on App Launcher on the left side of the screen.
2. Search Jewelry Inventory System & click on it.
3. Click on the Jewel Customer Tab.
4. Click on any record name. you can see the details of the Jewel Customer.



# CRM Application For Jewel Management

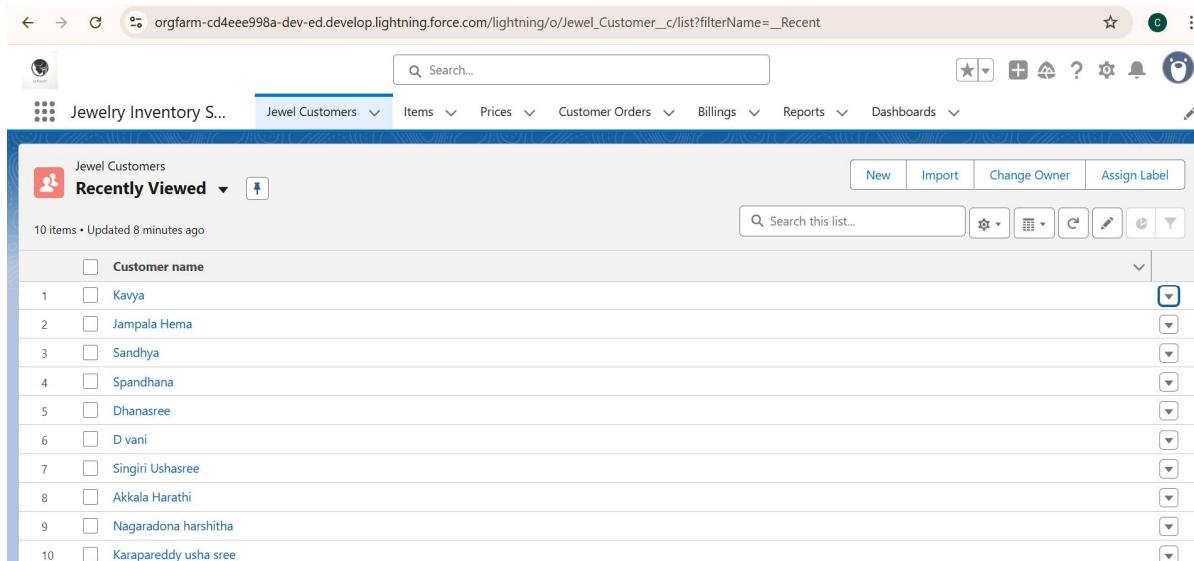
## Delete a Record (Jewel Customer)

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' list view in the CRM application. The title bar indicates the URL is `orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/o/Item__c/list?filterName=_Recent`. 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 toolbar with buttons for New, Import, Change Owner, and Assign Label. A 'Recently Viewed' section is displayed, showing a list of 10 items, each with a checkbox and a link. The items are numbered 1 through 10 and labeled 'Item-01' through 'Item-10'. The interface has a light blue header and a white body with a grey sidebar on the left.

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

The screenshot shows the 'Prices' list view in the CRM application. The title bar indicates the URL is `orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/o/Price__c/list?filterName=_Recent`. 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 toolbar with buttons for New, Import, Change Owner, and Assign Label. A 'Recently Viewed' section is displayed, showing a list of 10 prices, each with a checkbox and a link. The prices are numbered 1 through 10 and labeled 'Dhanasree' through 'Nagaradona harshitha'. The interface has a light blue header and a white body with a grey sidebar on the left.

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

# 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 for filtering, sorting, and actions. Below the toolbar, a header bar includes links for 'Jewelry Inventory S...', 'Customer Orders' (which is highlighted in blue), 'Billings', 'Reports', and 'Dashboards'. On the left, a sidebar displays a 'Recently Viewed' section with a list of 10 items, each with a checkbox and a link to 'Order - 0010', 'Order - 0009', 'Order - 0008', 'Order - 0007', 'Order - 0006', 'Order - 0005', 'Order - 0004', 'Order - 0003', 'Order - 0002', and 'Order - 0001'. The main content area lists 10 items under 'Customer Order No' from 1 to 10, each with a checkbox and a link to 'Order - 0010', 'Order - 0009', 'Order - 0008', 'Order - 0007', 'Order - 0006', 'Order - 0005', 'Order - 0004', 'Order - 0003', 'Order - 0002', and 'Order - 0001'. The interface has a light blue and white color scheme.

The screenshot shows the 'Billings' list view. The layout is identical to the Customer Orders view, with a search bar, toolbar, and header bar. The 'Billings' tab is highlighted in blue. The sidebar on the left shows a 'Recently Viewed' section with a list of 10 items, each with a checkbox and a link to 'Nagaradona harshitha', 'Singiri Ushasree', 'Karapareddy usha sree', 'Dhanasree', 'D vani', 'Sandhya', 'Jampala Hema', 'Nagaradona harshitha', 'Kavya', and 'Akkala Harathi'. The main content area lists 10 items under 'Billing Name' from 1 to 10, each with a checkbox and a link to the same names. The interface maintains the same light blue and white theme.

# 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.

	Item: Item Id	Prices: Item Price	Prices: Gold Price	Prices: Silver Price
1	Item-04	Nagaradona harshitha	\$10,000.0000	\$15,000.0000
2	Item-10	Nagaradona harshitha	\$10,000.0000	\$15,000.0000
3	Item-01	Kavya	\$1,000.0000	\$2,000.0000
4	Item-09	Singiri Ushasree	\$10,000.0000	\$20,000.0000
5	Item-02	Jampala Hema	\$5,000.0000	\$15,000.0000
6	Item-03	Sandhya	\$7,000.0000	\$3,000.0000
7	Item-08	Karapareddy usha sree	\$5,000.0000	\$20,000.0000
8	Item-05	Akkala Harathi	\$10,000.0000	\$35,000.0000
9	Item-06	D vani	\$5,000.0000	\$4,000.0000
10	Item-07	Dhanasree	\$800.0000	\$2,000.0000
11			\$53,800.0000	\$116,000.0000

#### 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.

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The screenshot shows a Salesforce Lightning interface for a 'Jewelry Inventory S...' app. The top navigation bar includes links for 'Jewel Customers', 'Items', 'Prices', 'Customer Orders', 'Billings', 'Reports' (which is the active tab), and 'Dashboards'. A search bar and various icons are also present.

The main content area is titled 'Report: Billings with Item New Billings with Item Report'. It shows a table with 11 rows of data:

	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	\$4,336.00

Total Records: 10 Total Gold/Silver Price: \$4,336.00

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.

The screenshot shows a Salesforce Lightning interface for a 'Jewelry Inventory S...' app. The top navigation bar includes links for 'Jewel Customers', 'Items', 'Prices', 'Customer Orders', 'Billings', 'Reports' (which is the active tab), and 'Dashboards'. A search bar and various icons are also present.

The main content area is titled 'Report: Items with Customer Orders New Items with Customer Orders Report'. It shows a table with 10 rows of data:

	Item: Item Id	Customer Order: Customer Order No	Expected Days Of Return	Prices
1	Item-05	Order - 0005	-	Akkala Harathl
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

Total Records: 10

# 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: Ite...	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.

Ite...	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 billings with item details.

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}

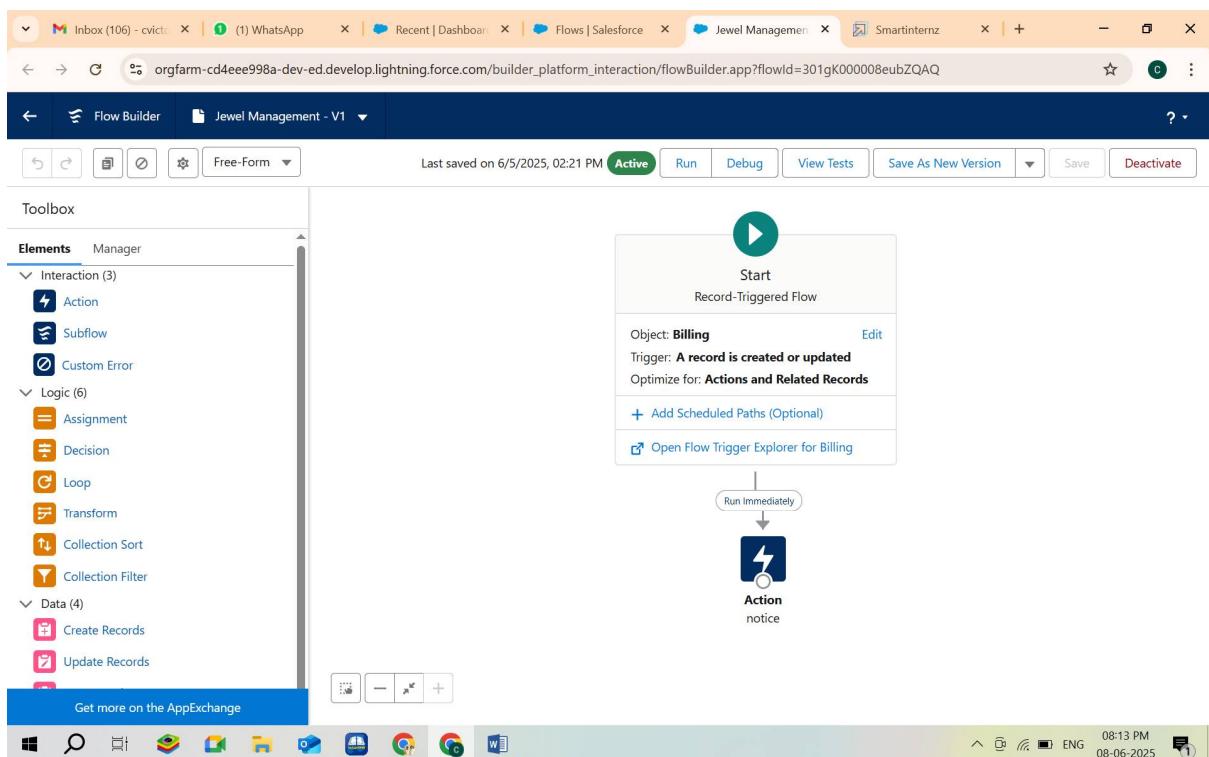
Weight: {!\$Record.Weight\_\_c}grams

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 in a Salesforce Lightning interface. 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 navigation icons are also present. The main content area displays a table with 10 items, each showing a checkbox and a customer name. The names listed are 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 in a Salesforce Lightning interface. The top navigation bar includes links for Jewelry Inventory S..., New Jewel Customer, and other tabs like Inbox and WhatsApp. The main content area shows a form titled 'New Jewel Customer' with sections for 'Information' and 'Owner'. The 'Information' section contains fields for Customer name (Nagaradona harshitha), State (AndhraPradesh), Street (Balajicolon), Country (INDIA), Zip/Postal code (517501), and City (Tirupati). A note indicates that \* = Required Information. The 'Owner' section shows victorjoy chokka. At the bottom of the form are buttons for Cancel, Save & New, and Save. The background shows a list of recently viewed customers on the left.

# CRM Application For Jewel Management

## Items Tab:

The screenshot shows the 'Items' tab in a CRM application. At the top, there's a navigation bar with links like 'Jewelry Inventory S...', 'Jewel Customers', 'Items', 'Prices', 'Customer Orders', 'Billings', 'Reports', and 'Dashboards'. Below the navigation is a search bar and a toolbar with buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. A sub-header 'Recently Viewed' is displayed above 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'. To the right of the list is a detailed view panel with a search bar and various filter and edit icons.

## New Item Details:

The screenshot shows a 'New Item' dialog box titled 'New Item: Gold'. The dialog is divided into sections: 'Information' and 'Stone/Other Price'. The 'Information' section contains fields for 'Item Id' (checkbox), 'Customer Name' (set to 'Nagaradona harshitha'), 'Ornament' (set to 'Necklace'), 'Weight' (set to '700.00000'), 'Stone Weight' (set to '5.00000'), and 'Percentage' (set to '0'). The 'Owner' field is populated with 'victorjoy chokka'. A note at the top right indicates '\* = Required Information'. At the bottom of the dialog are 'Cancel', 'Save & New', and 'Save' buttons. The background shows the 'Items' tab with a list of 10 items.

# CRM Application For Jewel Management

## Prices Tab:

The screenshot shows the 'Prices' tab in a CRM application. At the top, there's a navigation bar with links for 'Jewelry Inventory S...', 'Jewel Customers', 'Items', 'Prices' (which is the active tab), 'Customer Orders', 'Billings', 'Reports', and 'Dashboards'. Below the navigation is a search bar and a toolbar with icons for 'New', 'Import', 'Change Owner', and 'Assign Label'. The main area is titled 'Recently Viewed' and lists 10 items, each with a checkbox and a name: 1. Dhanasree, 2. D vani, 3. Kavya, 4. Spandhana, 5. Singiri Ushasree, 6. Jampala Hema, 7. Sandhya, 8. Karapareddy usha sree, 9. Akkala Harathi, and 10. Nagaradona harshitha. A message at the top says '10 items • Updated a few seconds ago'.

## New Price Tab Details:

The screenshot shows the 'New Price' dialog box in the CRM application. The title bar says 'New Price'. The dialog has a section labeled 'Information' with fields for 'Item Price' (set to 'Nagaradona harshitha'), 'Silver Price' (set to '\$1,500.00000'), and 'Gold Price' (set to '\$1,400.00000'). It also shows the 'Owner' as 'victorjoy chokka'. At the bottom of the dialog 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

## Customer Orders Tab:

The screenshot shows the 'Customer Orders' tab in a CRM application. At the top, there's a navigation bar with links for Jewelry Inventory S..., Jewel Customers, Items, Prices, Customer Orders (which is highlighted in blue), Billings, Reports, and Dashboards. Below the navigation is a sub-header for 'Customer Orders' with a 'Recently Viewed' section showing 10 items updated a few seconds ago. Each item in the list has a checkbox and a link labeled 'Order - 0001' through 'Order - 0010'. To the right of the list are various filters and search fields. At the bottom right of the main area, there are buttons for 'New', 'Import', and 'Assign Label'.

## New Customer Order Details:

The screenshot shows a 'New Customer Order' dialog box. The title is 'New Customer Order'. Inside the dialog, there's a note '\* = Required Information'. The 'Information' section contains two required fields: 'Customer' (set to 'Nagaradona harshitha') and 'Item' (set to 'Item-03'). At the bottom of the dialog are three buttons: 'Cancel', 'Save & New', and 'Save'. To the left of the dialog, there's a sidebar titled 'Recently Viewed' showing a list of 10 customer orders from 001 to 010. The entire interface is part of a larger CRM application with a similar header and navigation bar as the previous screenshot.

# 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. A search bar at the top right says "Search...". Below the navigation is a toolbar with "New", "Import", "Change Owner", and "Assign Label" buttons. 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. To the right of the list are several small icons for filtering and sorting.

## New Billing Tab Details:

The screenshot shows the "New Billing" dialog box. The title bar says "New Billing" and there is a note "\* = Required Information". The "Information" section contains three fields: "Billing Name" (set to "Nagaradona harshitha"), "Item" (set to "Item-01"), and "Paid Amount" (set to "\$1,000"). To the right of the form, the "Owner" field is set to "victorjoy chokka". At the bottom of the dialog are "Cancel", "Save & New", and "Save" buttons. The background shows the same Billings tab interface as the previous screenshot, with the "Recently Viewed" list partially visible.

# CRM Application For Jewel Management

## Reports Tab:

The screenshot shows the 'Reports' tab in the CRM application. On the left, there's a sidebar with categories: 'Recent' (3 items), 'REPORTS' (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. The first three rows are visible:

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	<input type="checkbox"/>	
New Billings with Item Report	Private Reports	victorjoy chokka	6/4/2025, 11:28 PM	<input type="checkbox"/>	
New Items with Prices Report	Private Reports	victorjoy chokka	6/5/2025, 12:08 AM	<input type="checkbox"/>	

## New Reports Tab Details:

The screenshot shows a report detail page titled 'New Items with Customer Orders Report'. At the top, there are buttons for 'Enable Field Editing', 'Add Chart', and 'Edit'. Below the title, it says 'Total Records 10'. The table has columns: Item: Item Id, Customer Order: Customer Order No, Expected Days Of Return, and Prices. The data is as follows:

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	-	Karaparedy usha sree
9 Item-09	Order - 0009	-	Singiri Ushasree
10 Item-10	Order - 0010	-	Nagaradona harshitha

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## Dashboards Tab:

Screenshot of the Dashboards tab in the CRM application. The page shows a list of recent dashboards, including 'Jewel Management' which was created by victorjoy chokka on June 5, 2025, at 12:10 AM. The interface includes a search bar, navigation links for Jewelry Inventory, Jewel Customers, Items, Prices, Customer Orders, Billings, Reports, and Dashboards.

## New Dashboards Details:

Screenshot of the 'Jewel Management' dashboard. It displays three reports:

- New Items with Prices Report**: A table showing items and their prices.
- New Items with Customer Orders Report**: A table showing customer orders and their details.
- New Billings with Item Report**: A table showing billings for Gold/Silver Price.