

CRM Application For Jewel Management

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Salesforce

Introduction:

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

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

What Is Salesforce?

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

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

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

<https://youtu.be/r9EX3IGde5k>

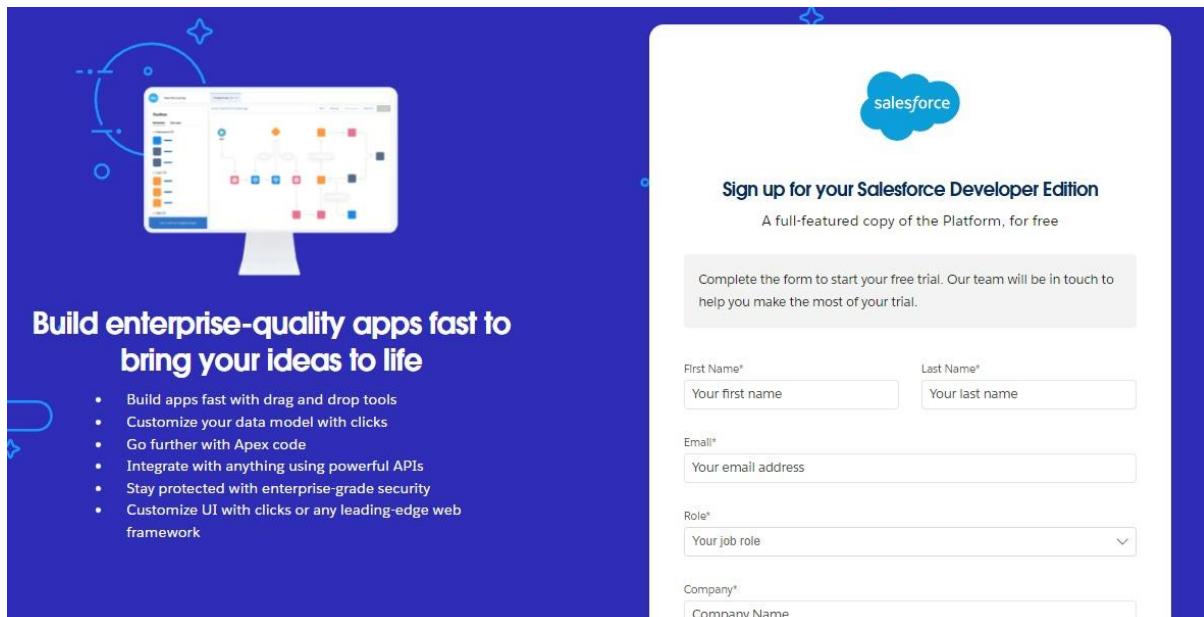
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MILESTONE-1

Creating Developer Account

Creating a developer org in salesforce.

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

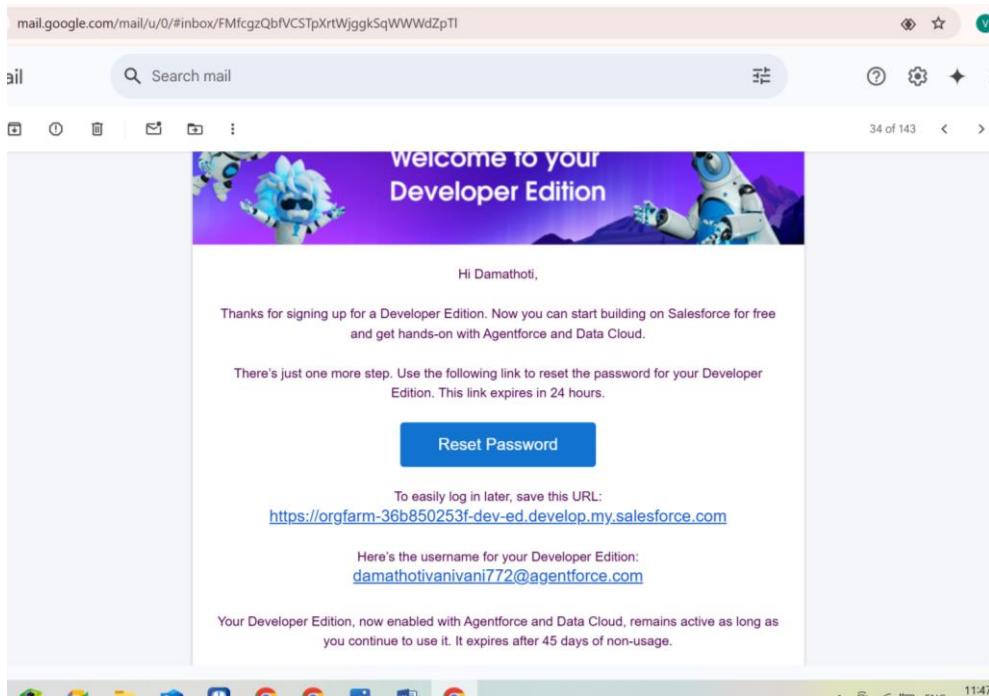


- 1. First name** : Damathoti
- 2. Last name** : Vani
- 3. Email** : damathotivanivani@gmail.com
- 4. Role** : Developer
- 5. Company** : Gayatri degree college-Tirupati
- 6. County** : India
- 7. Postal Code** : 517501
- 8. Username** : damathotivanivani730@agentforce.com

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Account Activation

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



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

The screenshot shows a 'Change Your Password' form. At the top, there's a blue decorative cloud icon. Below it, the title 'Change Your Password' is centered. The form instructions say: 'Enter a new password for lead@sb.oom. Make sure to include at least:'. There are four checked items: '8 characters', '1 letter', '1 number', and '1 symbol'. The 'New Password' field contains 'Good' and has a red border. The 'Confirm New Password' field contains 'Match' and also has a red border. Below these fields is a 'Security Question' section with the question 'In what city were you born?' and an 'Answer' field containing 'asdfghjkl'. A large blue 'Change Password' button at the bottom is also highlighted with a red border.

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

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The screenshot shows the Salesforce Setup Home page. The top navigation bar includes a cloud icon, the word "Setup", "Home", and "Object Manager". A search bar says "Search Setup" and there are various icons for configuration. The main content area is titled "SETUP Home" and features three cards:

- Get Started with Einstein Bots**: Launch an AI-powered bot to automate your digital connections. Includes a "Get Started" button.
- Mobile Publisher**: Use the Mobile Publisher to create your own branded mobile app. Includes a "Learn More" button.
- Real-time Collaborative Docs**: Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce. Includes a "Get Started" button.

The left sidebar has sections like "Quick Find", "Setup Home", "Service Setup Assistant", "Multi-Factor Authentication Assistant", "Release Updates", "Lightning Experience Transition Assistant", "Salesforce Mobile App", "Lightning Usage", "Optimizer", and "ADMINISTRATION". Under "ADMINISTRATION", "Users" is expanded.

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MILESTONE-2

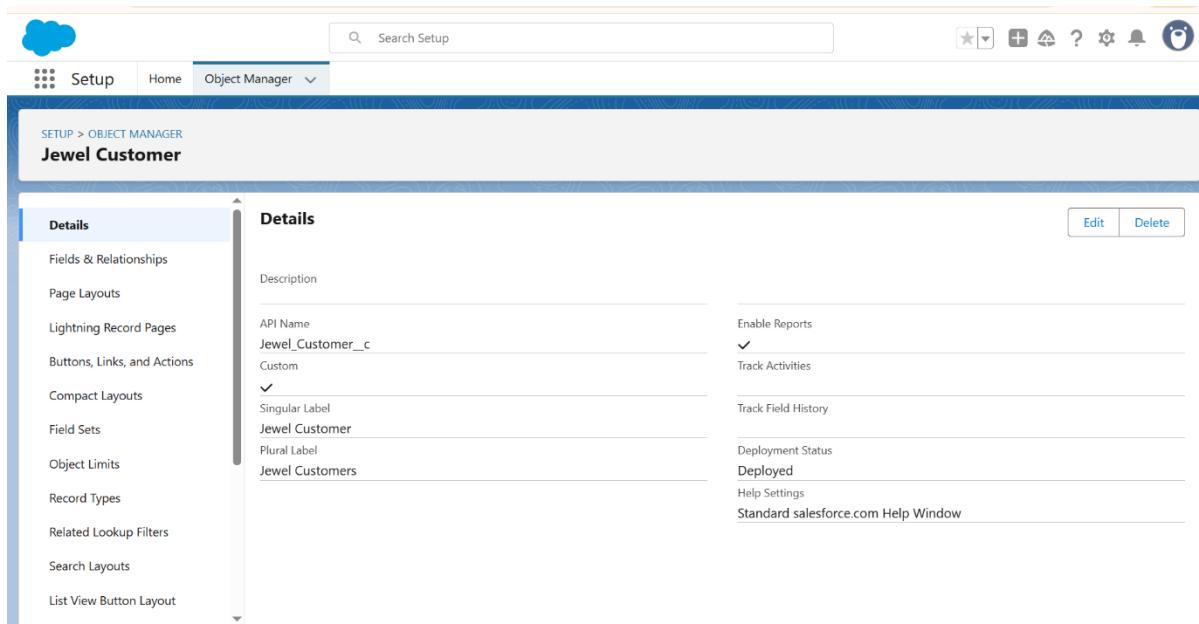
Object

Create Jewel Customer Object

The purpose of creating a Jewel Customer custom object is to store and manage information about Customer.

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
2. Enter the label name >> Jewel Customer
3. Plural label name >> Jewel Customers
4. Enter Record Name Label and Format
 - Record Name >> Customer name
 - Data Type >> Text
5. Click on Allow reports.
6. Allow search >> Save.



Create Item Object

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

To create an object:

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

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a cloud icon, a search bar labeled 'Search Setup', and various global buttons. Below the header, the breadcrumb path 'SETUP > OBJECT MANAGER' and the object name 'Item' are displayed. The main content area is divided into two columns: 'Details' on the left and 'Fields & Relationships' on the right. The 'Details' column contains fields for API Name ('Item_c'), Singular Label ('Item'), and Plural Label ('Items'). The 'Fields & Relationships' column lists various configuration 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. On the far right, there are 'Edit' and 'Delete' buttons. A URL at the bottom of the page is: <https://orafarm-cd4eee998a-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/01IqK000000sVTR/AlohaSearchLayouts/view>.

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, question mark, gear, and bell.

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

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 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 managing the setup.

The main area is titled 'SETUP > OBJECT MANAGER' and shows the 'Price' object details. On the left, a sidebar lists options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The 'Details' tab is selected, showing fields such as 'API Name' (Price_c), 'Custom' (selected), 'Singular Label' (Price), and 'Plural Label' (Prices). On the right, settings include 'Enable Reports' (checked), 'Track Activities', 'Track Field History', 'Deployment Status' (Deployed), 'Help Settings', and 'Standard salesforce.com Help Window'.

Create Billing Object

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

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
 1. Enter the label name >> Billing
 2. Plural label name >> Billings
 3. Enter Record Name Label and Format
 - Record Name >> Billing Name
 - Data Type >> Text
2. Click on Allow reports.
3. Allow search >> Save.

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The screenshot shows the Salesforce Object Manager interface for the 'Billing' object. The top navigation bar includes links for Setup, Home, and Object Manager. A search bar is present at the top right. The main content area displays the 'Details' tab for the Billing object. On the left, a sidebar lists various configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main details section shows the API Name as 'Billing__c', which is custom and singularly labeled 'Billing'. Other settings include enabling reports (checked), tracking activities, tracking field history, and a deployment status of 'Deployed'. Help settings point to the standard salesforce.com 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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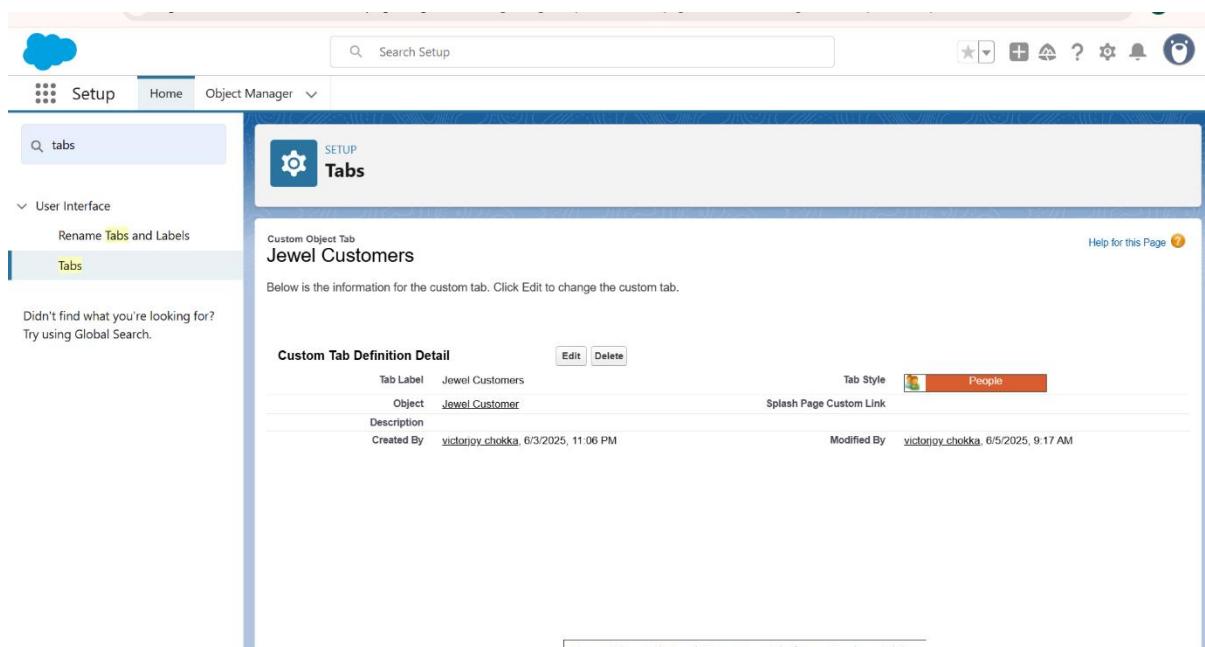
MILESTONE-3

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 page title is "Custom Tabs". The left sidebar has sections for "User Interface" and "Tabs", with "Tabs" selected. The main content area displays "Custom Object Tabs" and "Web Tabs".

Custom Object Tabs

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

Web Tabs

New	What Is This?
No Web Tabs have been defined	

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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

* 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

Jewelry Inventory System

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MILESTONE-5

Fields

Creating Lookup Relationship

To Create a relationship between Jewel Customer & Customer Order Objects.

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a cloud icon, a search bar labeled 'Search Setup', and various global buttons. The main header says 'SETUP > OBJECT MANAGER' and 'Jewel Customer'. On the left, a sidebar lists options like Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area displays the 'Customer' custom field for the 'Jewel Customer' object. It shows the field's details: Field Label: Customer, Field Name: Customer, API Name: Customer__c, Object Name: Jewel Customer, Data Type: Lookup. It also shows the field's history: Created By: victorjoy_chokka, 6/5/2025, 8:55 PM; Modified By: victorjoy_chokka, 6/5/2025, 8:55 PM. The 'Lookup Options' section indicates that the field is related to 'Jewel Customer' and has a child relationship name 'Jewel_Customers'. A note at the bottom says 'What to do if the lookup record Clear the value of this field.'

Creating a Master-Detail Relationship

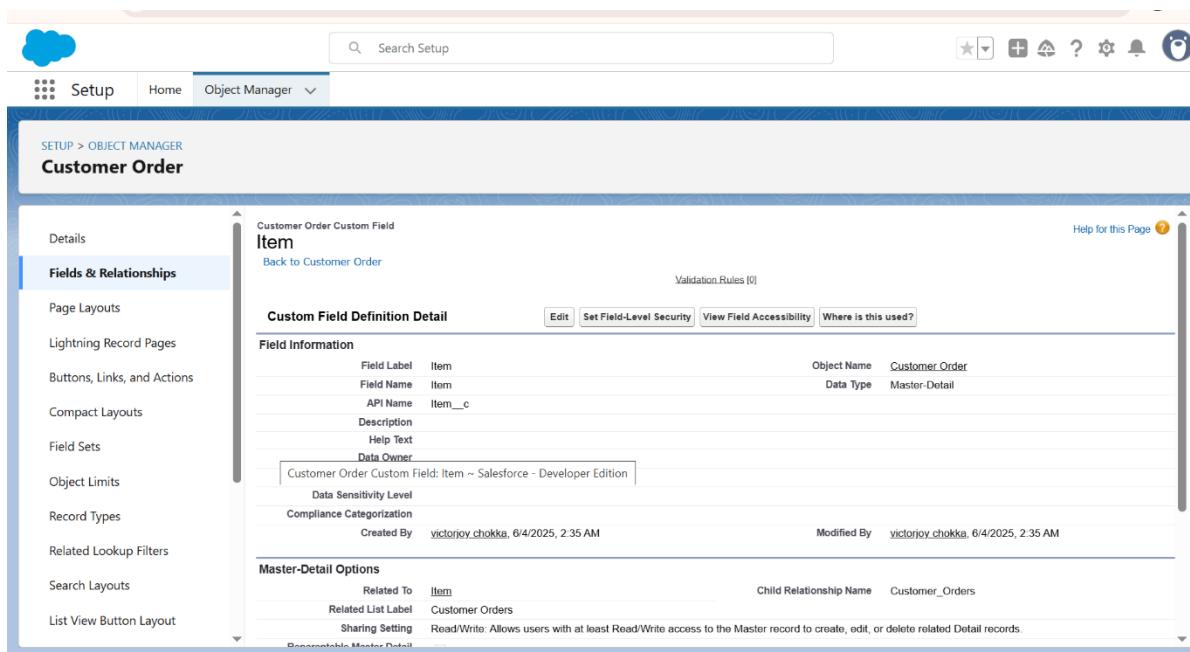
Master-detail relationship is a type of relationship between two objects where the master object controls certain behaviours and settings of the detail object. Here are a few use cases that demonstrate the use of master-detail relationships

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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 Setup interface. The top navigation bar includes a cloud icon, 'Setup', 'Home', 'Object Manager', and various global buttons. The main area is titled 'Jewel Customer' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists options like 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', etc. The central panel displays the 'Custom Field Definition Detail' for a field named 'City'. The 'Field Information' section shows: Field Label: City, Field Name: City, API Name: City__c, Object Name: Jewel Customer, Data Type: Text. The 'General Options' section includes checkboxes for Required, Unique, and Case Sensitive. A 'Validation Rules [0]' button 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 is titled 'FIELDS & RELATIONSHIPS' under 'Jewel Customer'. The main content area displays the 'Custom Field Definition Detail' for a field named 'Phone'. The 'Field Information' section shows the following details:

Field Label	Phone
Field Name	Phone
API Name	Phone_c
Description	(empty)
Help Text	(empty)
Data Owner	(empty)
Field Usage	(empty)
Data Sensitivity Level	(empty)
Compliance Categorization	(empty)

Below this, the 'General Options' section includes a 'Required' checkbox which is unchecked.

At the bottom right, it shows 'Modified By: victorjoy.chokka, 6/3/2025, 11:27 PM'.

To create fields in an object:

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

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

Field Label	Email
Field Name	Email
API Name	Email_c
Description	(empty)
Help Text	(empty)
Data Owner	(empty)
Field Usage	(empty)
Data Sensitivity Level	(empty)
Compliance Categorization	(empty)

Below this, the 'General Options' section includes 'Required' and 'Unique' checkboxes, both of which are unchecked.

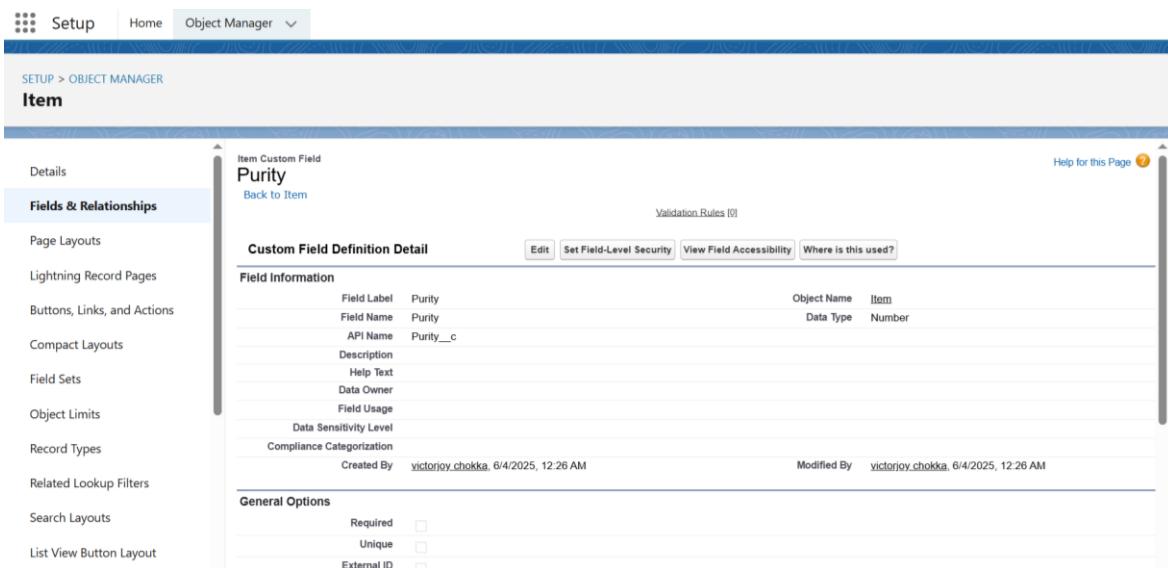
At the bottom right, it shows 'Created By: victorjoy.chokka, 6/3/2025, 11:28 PM' and 'Modified By: victorjoy.chokka, 6/3/2025, 11:28 PM'.

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Creating the number field in Item object

To create fields in an object:

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



Creating Picklist Field in Item Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" ? New.
3. Select Data type as "Picklist" and click Next.
4. Enter Field Label as "Item Type".
5. In values select "Enter values(Gold,Silver)", with each value separated by a new line" and enter values as shown below.
6. Click Next >> Next >> Next >> Save .

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The screenshot shows the Salesforce Setup interface under the Object Manager section for the 'Item' object. A custom field named 'Item Type' is being created. The 'Field Information' section shows the following details:

Field Label	Item Type	Object Name	Item
Field Name	Item_Type	Data Type	Picklist
API Name	Item_Type__c		
Description			
Help Text			
Data Owner			
Field Usage			

Other sections visible include 'General Options' (Required checked) and 'Last Modified By' (victorjoy.chokka, 6/4/2025, 12:27 AM).

Creating Currency Field in Price Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Price) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Currency" and click Next.
4. Enter Field Label as "Gold Price" and length as " 8"and decimal 5.Field name will be auto generated.
5. Click Next >> Next >> Next >> Save .

The screenshot shows the Salesforce Setup interface under the Object Manager section for the 'Price' object. A custom field named 'Gold Price' is being created. The 'Field Information' section shows the following details:

Field Label	Gold Price	Object Name	Price
Field Name	Gold_Price	Data Type	Currency
API Name	Gold_Price__c		
Description			
Help Text			
Data Owner			
Field Usage			

Other sections visible include 'General Options' (Required checked) and 'Last Modified By' (victorjoy.chokka, 6/3/2025, 11:31 PM).

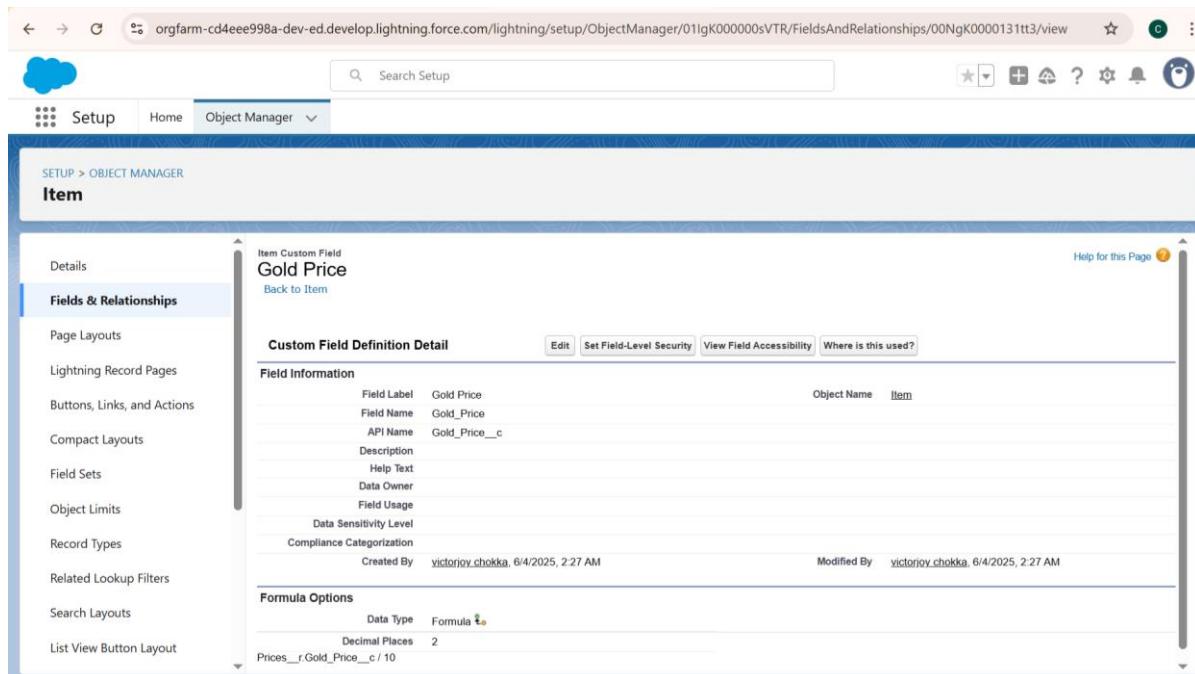
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Creating Formula Field(Cross Object) in Item Object

To create fields in an object:

(Note: Create a Lookup Relationship in Item Object to Price Object with Field Name: Prices)

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Gold Price" and select formula return type as "Currency" and click next.
5. Under Advanced Formula write down the formula : Prices_r.Gold_price_c /10.
6. Click "Check Syntax" and Next >> Next >> Save & New.



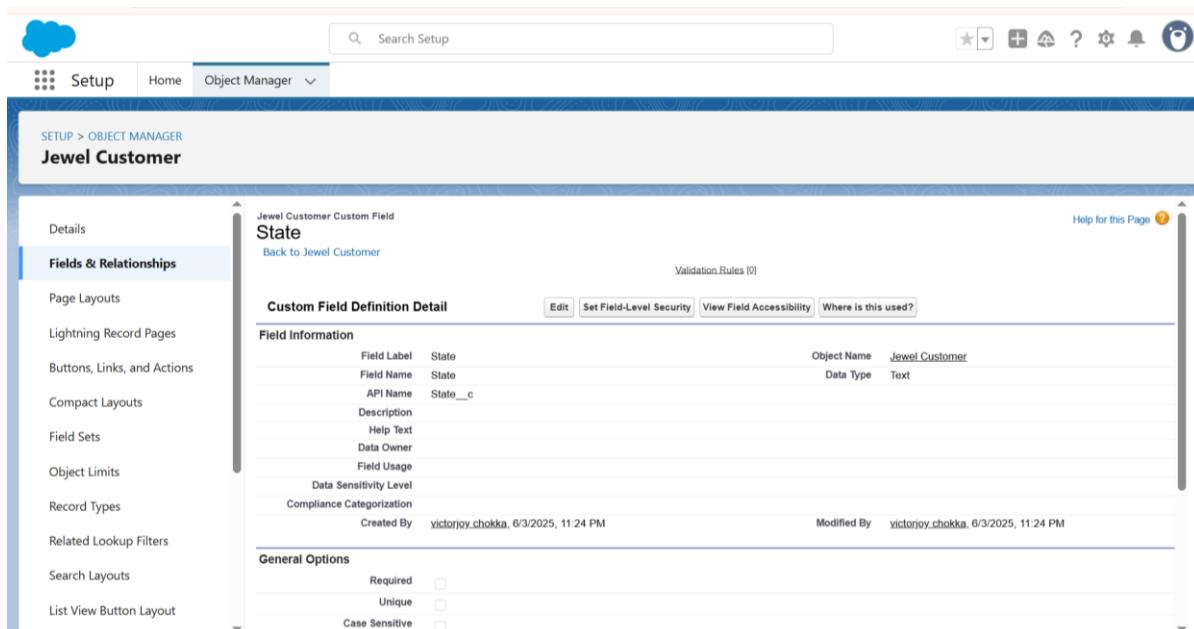
Creating Text Field in Jewel Customer Object

To create fields in an object:

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

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2. Now click on "Fields & Relationships" >> New
3. Select Data type as "Text".
4. Click on Next
5. Fill the above as following:
 - o Field Label: State
 - o Length : 20
 - o Field Name : gets auto generated
 - o Click on Next >> Next >> Save and new.



Creating Text Field in Jewel Customer Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Jewel Customer) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as "Text".
4. Click on Next
5. Fill the above as following:

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

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

Below this, the "Created By" field shows "victorjoy.chokka, 6/3/2025, 11:25 PM" and the "Modified By" field shows "victorjoy.chokka, 6/3/2025, 11:25 PM". The "General Options" section includes checkboxes for "Required", "Unique", and "Case Sensitive". A "Validation Rules [0]" link is also present.

Creating Text Field in Jewel Customer Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Text”.
4. Click on Next
5. Fill the above as following:
 - o Field Label: Country
 - o Length : 18
 - o Field Name : gets auto generated
 - o Click on Next >> Next >> Save and new.

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The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'Fields & Relationships' and lists various layout types. The main content area is titled 'Custom Field Definition Detail' for a field named 'Country'. The field information includes:

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

General Options include:

- Required:
- Unique:
- Case Sensitive:

Creating Text Field in Jewel Customer Object

To create fields in an object:

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

Click on Next >> Next >> Save and new

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The screenshot shows the Salesforce setup interface under 'Object Manager'. A custom field named 'Zip/Postal code' is being created for the 'Jewel Customer' object. The field information includes:

- Field Label:** Zip/Postal code
- Field Name:** Zip_Postal_code
- API Name:** Zip_Postal_code_c
- Description:** (empty)
- Help Text:** (empty)
- Data Owner:** (empty)
- Field Usage:** (empty)
- Data Sensitivity Level:** (empty)
- Compliance Categorization:** (empty)
- Created By:** victorjoy.chokka, 6/3/2025, 11:26 PM
- Modified By:** victorjoy.chokka, 6/3/2025, 11:26 PM

The 'General Options' section shows that 'Required' is checked.

Creating Currency Field in Price Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Price) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Currency" and click Next.
4. Enter Field Label as " Silver Price" and length as " 8"and decimal 5.Field name will be auto generated.
5. Click Next >> Next >> Next >> Save .

The screenshot shows the Salesforce setup interface under 'Object Manager'. A custom field named 'Silver Price' is being created for the 'Price' object. The field information includes:

- Field Label:** Silver Price
- Field Name:** Silver_Price
- API Name:** Silver_Price_c
- Description:** (empty)
- Help Text:** (empty)
- Data Owner:** (empty)
- Field Usage:** (empty)
- Data Sensitivity Level:** (empty)
- Compliance Categorization:** (empty)
- Created By:** victorjoy.chokka, 6/3/2025, 11:30 PM
- Modified By:** victorjoy.chokka, 6/3/2025, 11:30 PM

The 'General Options' section shows that 'Required' is checked.

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Creating Lookup Relationship

1. Go to the setup page >> click on object manager >> type object name (Item) in the quick find bar >> click on the object
2. Click on fields & relationship >> click on New.
3. Select "Lookup relationship" as data type and click Next.
4. Select the related object "Jewel Customer".
5. Give Field Label as "Customer Name" and click Next.
6. Next >> Next >> Save.

The screenshot shows the Salesforce Setup interface for creating a custom field. The URL in the address bar is <https://orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK00000sVTR/FieldsAndRelationships/00NgK000012zwDa/view>. The page title is "Item Custom Field Customer Name". The "Fields & Relationships" tab is selected in the sidebar. The main content area shows the "Custom Field Definition Detail" for "Customer Name". Key details include:

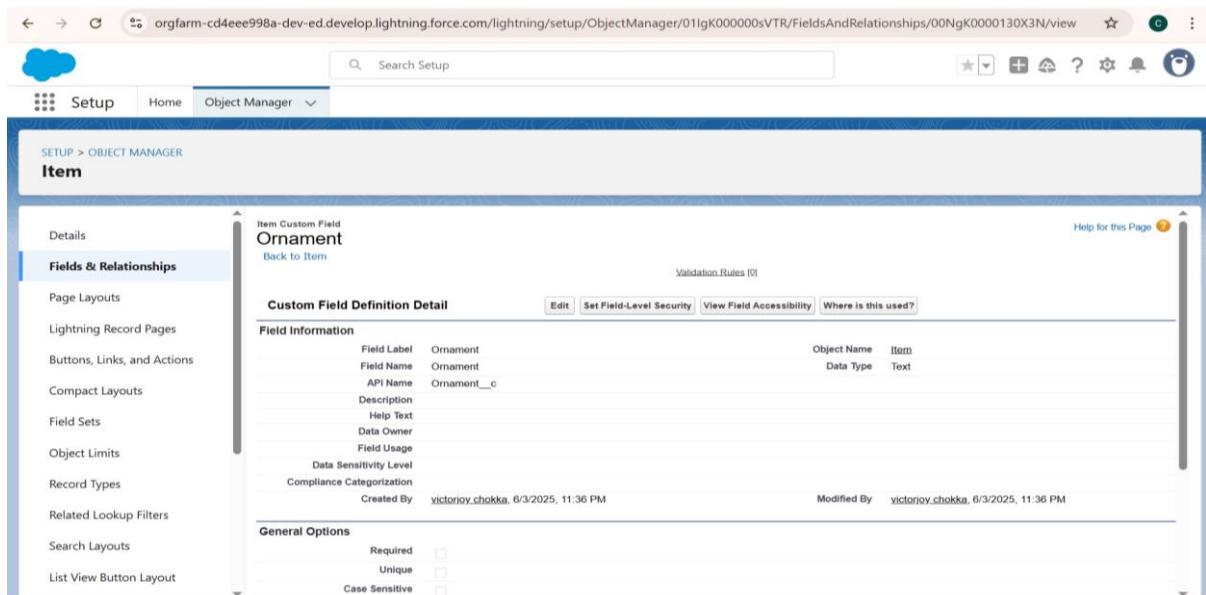
- Field Label:** Customer Name
- Object Name:** Item
- Data Type:** Lookup
- Related To:** Jewel Customer
- Related List Label:** Items
- Required:**

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.



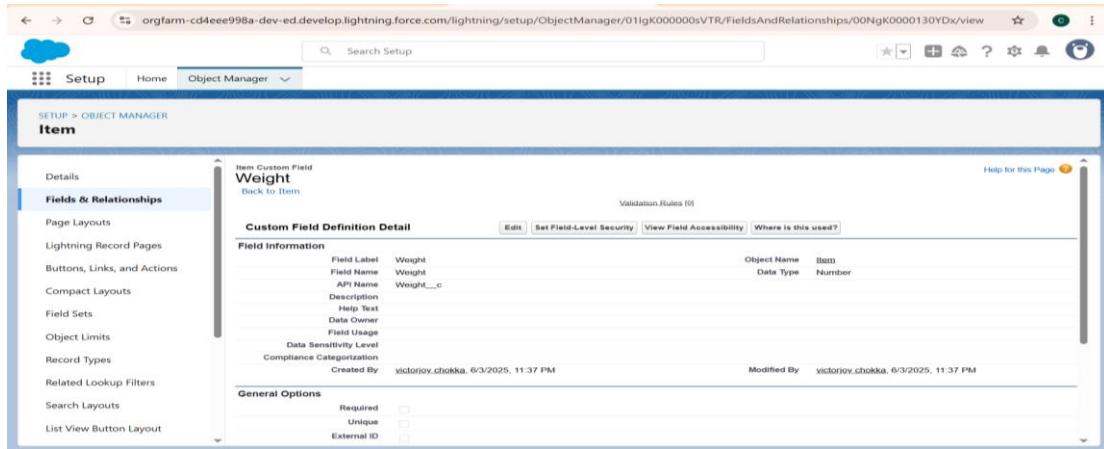
Creating the number field in Item object

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”.

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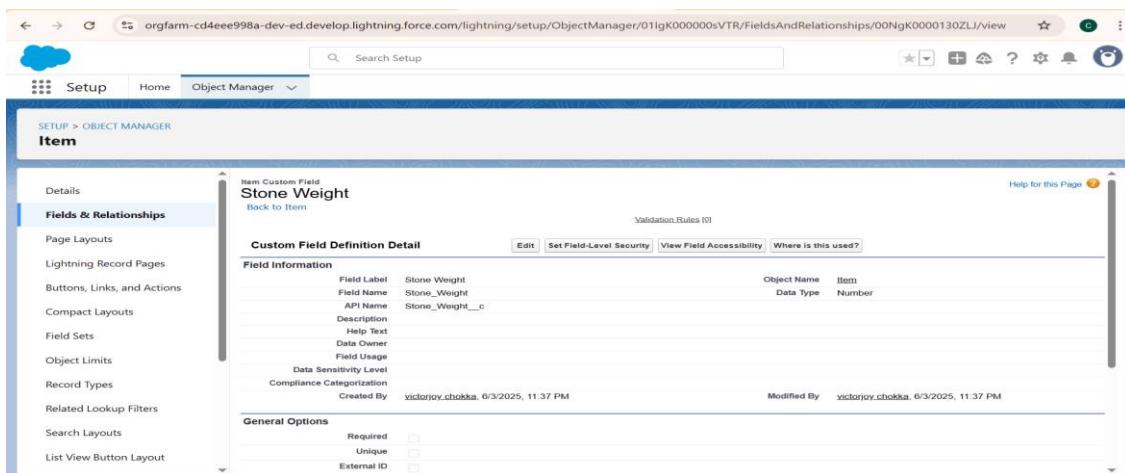
5. Field Name will be auto populated, and click on Next >> Next >> Save.



Creating the number field in Item object

To create fields in an object:

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

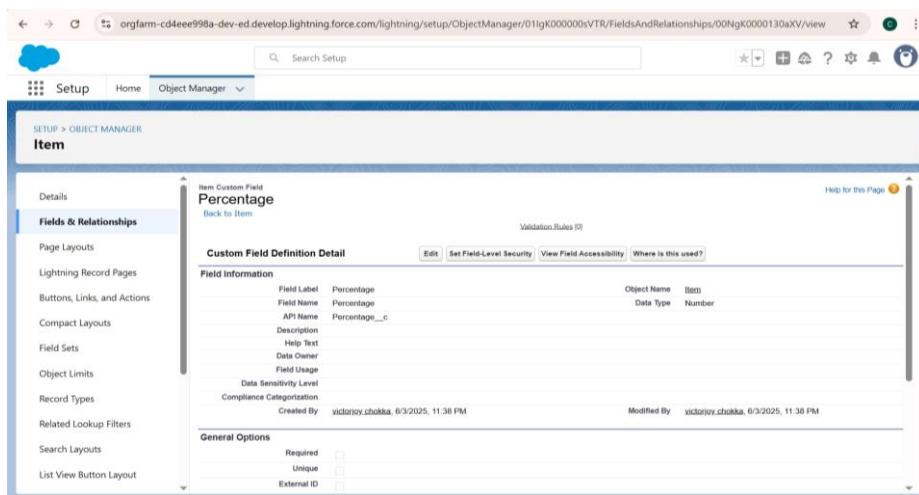


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Creating the number field in Item object

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 information includes:

- Field Label:** Stone/Other Price
- Field Name:** Stone_Other_Price
- API Name:** Stone_Other_Price_c
- Description:** Help Text
- Data Owner:** Field Usage
- Data Sensitivity Level:** Compliance Categorization
- Created By:** victorjoy.chokka, 6/3/2025, 11:39 PM
- Object Name:** Item
- Data Type:** Currency
- Modified By:** victorjoy.chokka, 6/3/2025, 11:39 PM

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 information includes:

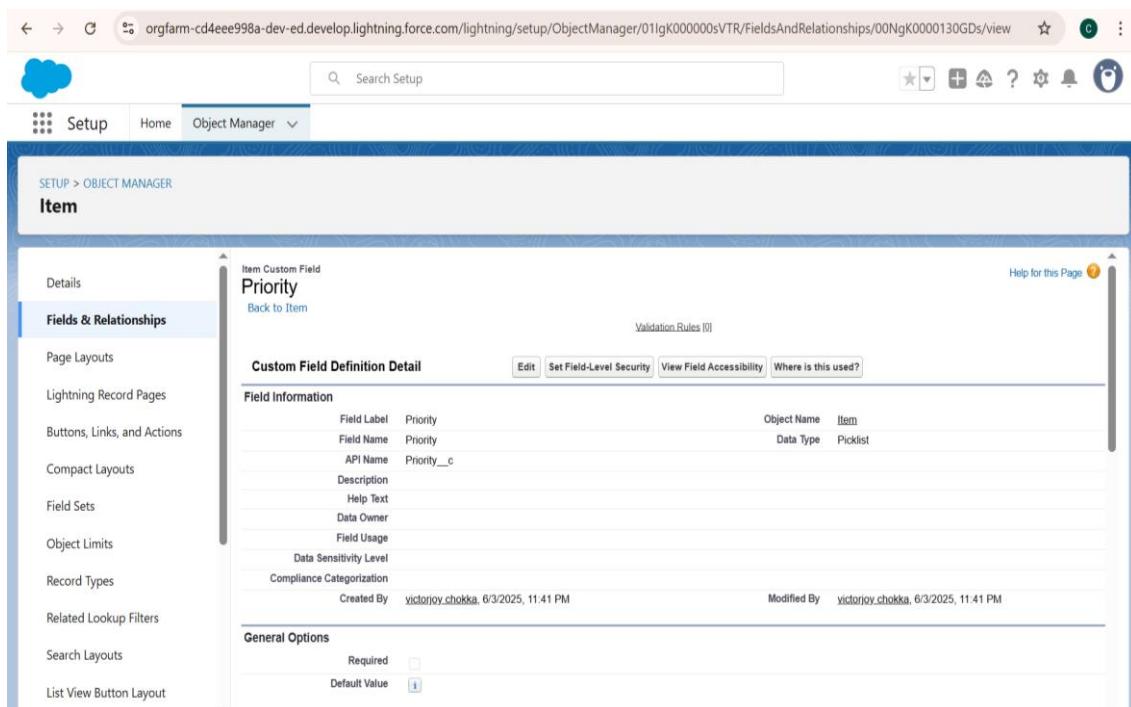
- Field Label:** Expected Days Of Return
- Field Name:** Expected_Days_Of_Return
- API Name:** Expected_Days_Of_Return_c
- Description:** Help Text
- Data Owner:** Field Usage
- Data Sensitivity Level:** Compliance Categorization
- Created By:** victorjoy.chokka, 6/3/2025, 11:40 PM
- Object Name:** Item
- Data Type:** Picklist
- Modified By:** victorjoy.chokka, 6/3/2025, 11:40 PM

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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 .

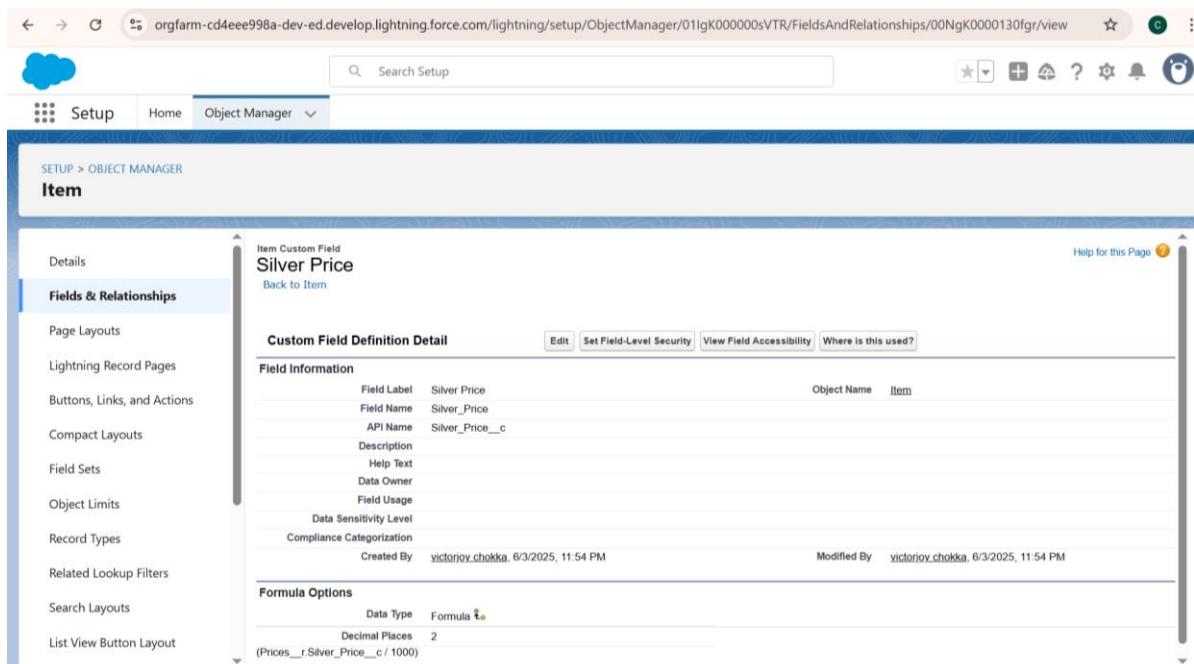


Creating Formula Field in Item Object

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.

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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_c
- API Name:** Purity_Gold_Price__c
- Data Type:** Formula
- Decimal Places:** 2
- Formula:** $((Prices__r.Gold_Price__c * Purity__c) / 10)$
- Created By:** victorjoy.chokka, 6/4/2025, 2:07 AM
- Modified By:** victorjoy.chokka, 6/4/2025, 2:07 AM

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:** $(Weight__c - Stone_Weight__c)$
- Created By:** victorjoy.chokka, 6/4/2025, 2:13 AM
- Modified By:** victorjoy.chokka, 6/4/2025, 2:13 AM

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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.

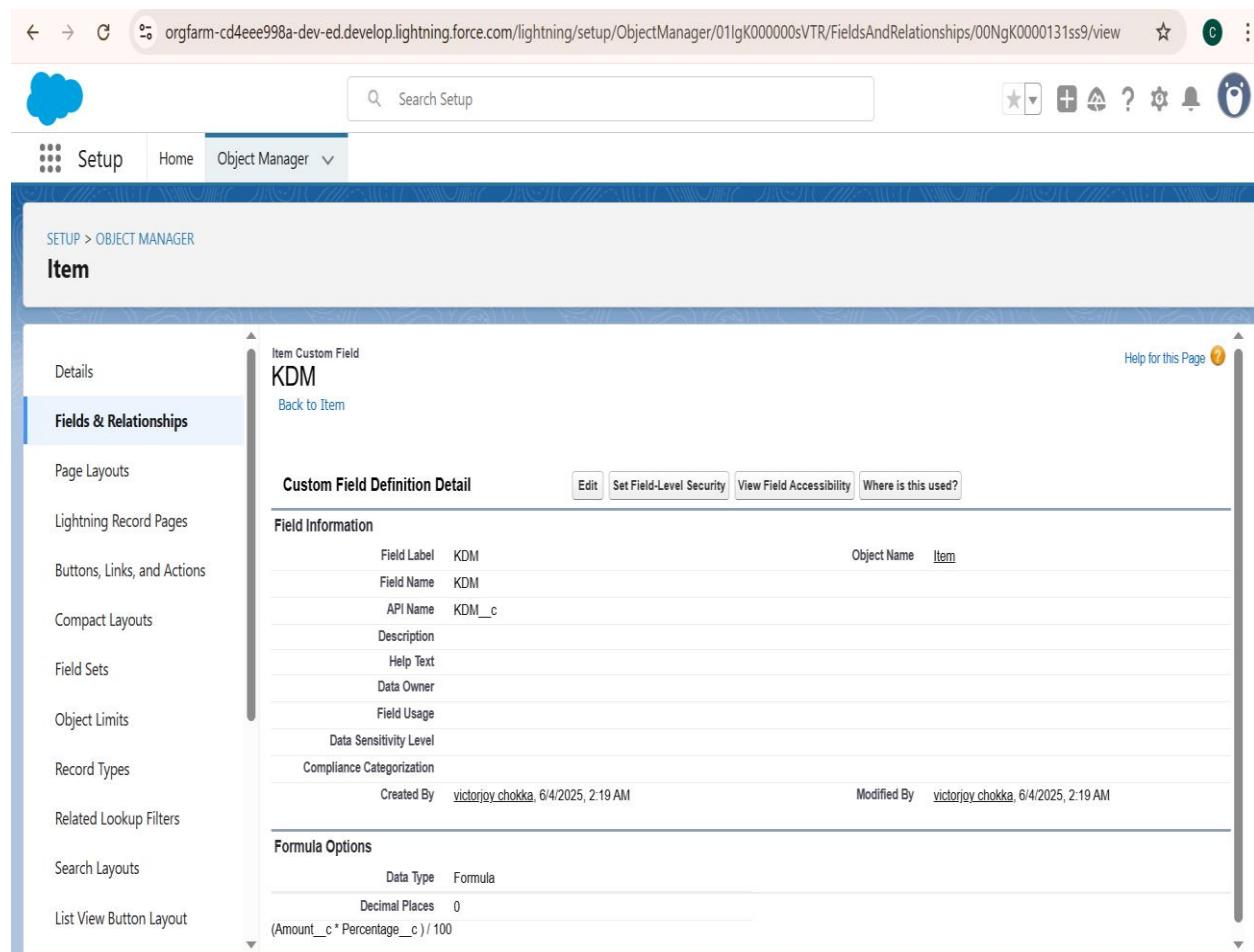
The screenshot shows the Salesforce Setup interface with the following details:

- 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:** Item Custom Field: Amount ~ Salesforce - Developer Edition
- Field Details:**
 - Field Label: Amount
 - Field Name: Amount
 - API Name: Amount_c
 - Description: Help Text
 - Data Owner: (not specified)
 - Field Usage: (not specified)
 - Data Sensitivity Level: (not specified)
 - Compliance Categorization: (not specified)
- Created By:** victorjoy.chokka, 6/4/2025, 2:16 AM
- Modified By:** victorjoy.chokka, 6/4/2025, 2:16 AM
- Formula Options:**
 - Data Type: Formula
 - Decimal Places: 3
- Advanced Formula:** IF(ISPICKVAL(Item_Type_c , "Gold"), Total_weight_c * Purity_Gold_Price_c , Total_weight_c * Silver_Price_c)

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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 "KDM" and select formula return type as "Currency" and Decimal as " 0 " and click next.
5. Under Advanced Formula write down the formula :
$$(\text{Amount_c} * \text{Percentage_c}) / 100$$
6. Click "Check Syntax" and Next >> Next >> Save & New.



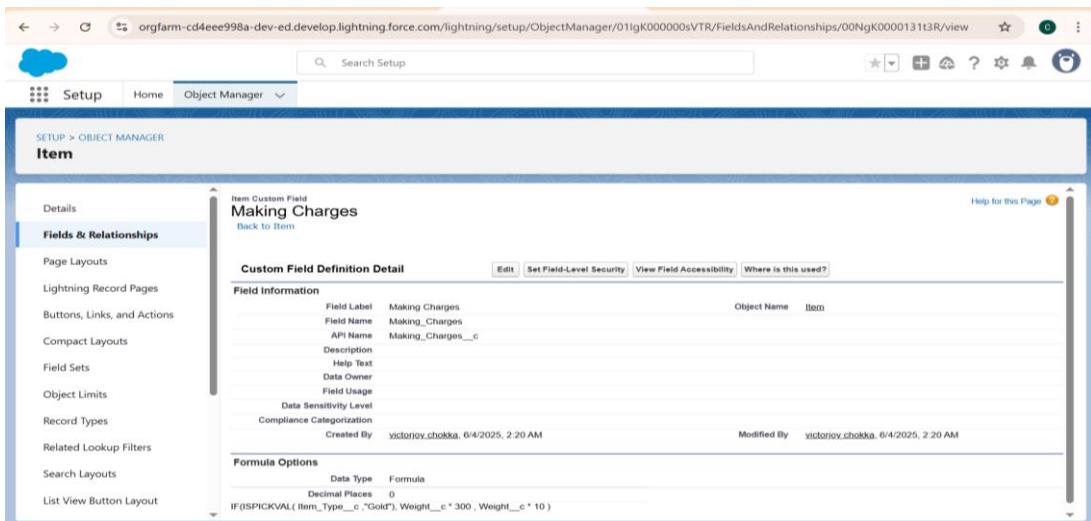
The screenshot shows the Salesforce Setup interface for creating a custom field. The URL in the browser is <https://orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK00000sVTR/FieldsAndRelationships/00NgK0000131ss9/view>. The page title is "SETUP > OBJECT MANAGER". The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

Creating Formula Field in Item Object

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

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

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

Creating Lookup Relationship

1. Go to the setup page >> click on object manager >> type object name (Billing) in the quick find bar >> click on the object
2. Click on fields & relationship >> click on New.
3. Select "Lookup relationship" as data type and click Next.
4. Select the related object "Item".
5. Give Field Label as "Item" and click Next.
6. Next >> Next >> Save.

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

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

Lookup Options:

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

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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 "Ornament" and select formula return type as "Text" and click next.
5. Under Advanced Formula write down the formula : Item__r.Ornament__c
6. Click "Check Syntax" and Next >> Next >> Save & New.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Billing'. On the left, there's a sidebar with options like 'Details', 'Fields & Relationships' (which is selected), and various layout-related items. The main content area displays a 'Custom Field Definition Detail' for a field named 'Ornament'. The 'Field Information' section shows the following details:

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

The 'Formula Options' section shows the data type as 'Formula' with the formula 'Item__r.Ornament__c' entered. There are also tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. A 'Help for this Page' link is also present.

Creating Formula Field in Billing Object

1. Go to setup >> click on Object Manager >> type object name (Billing) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Stone weight" and select formula return type as "Number" and Decimal as " 2 " and click next.
5. Under Advanced Formula write down the formula : Item__r.Stone_weight__c

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

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

Creating Formula Field in Billing Object

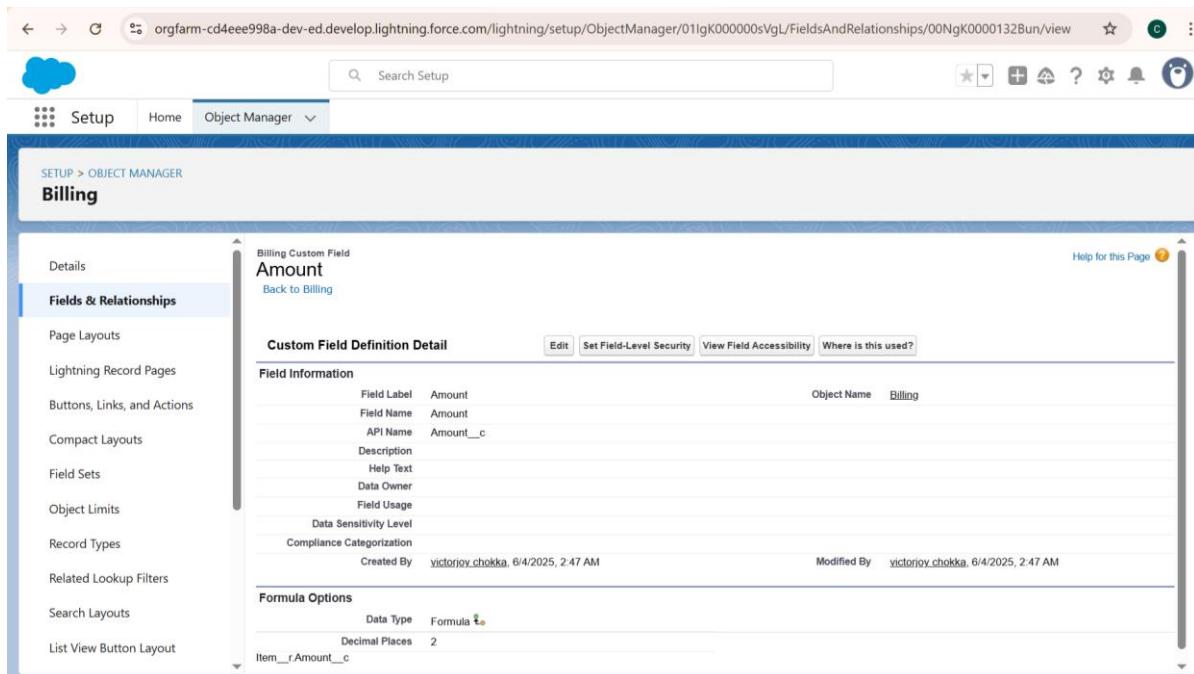
1. Go to setup >> click on Object Manager >> type object name (Billing) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Weight" and select formula return type as "Number" and Decimal as "2" and click next.
5. Under Advanced Formula write down the formula : Item__r.Total_weight__c
6. click "Check Syntax" and Next >> Next >> Save & New.

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

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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.

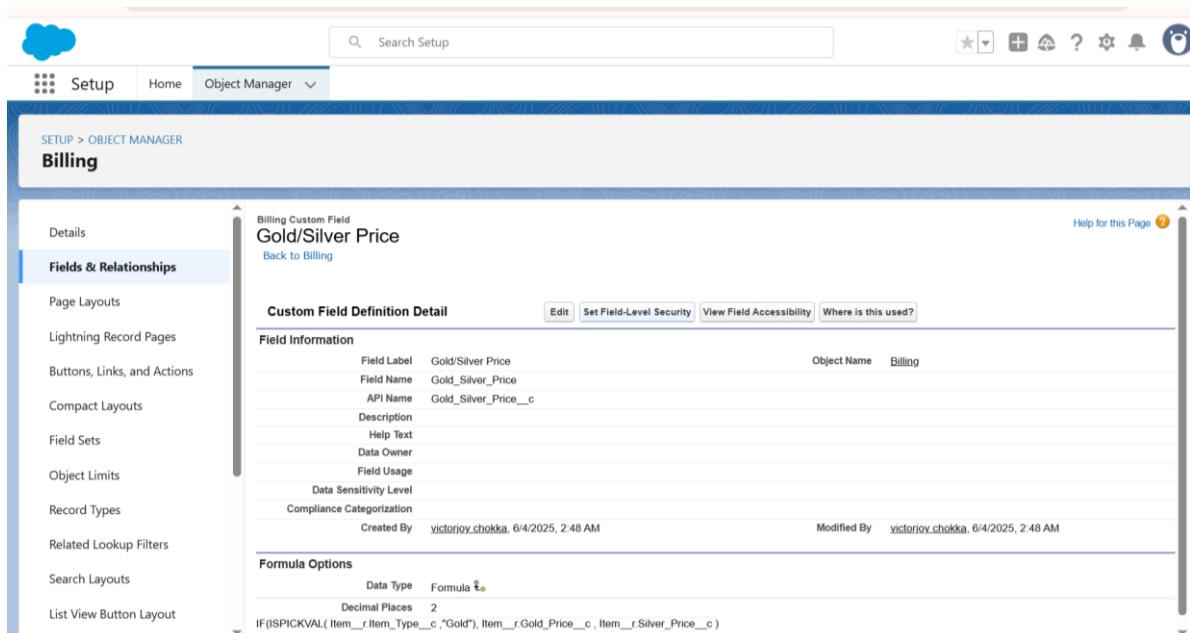
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4. Give Field Label and Field Name as "Gold/Silver Price" and select formula return type as "Currency" and Decimal as " 2 " and click next.

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 Object Manager interface. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Fields & Relationships. Under 'Fields & Relationships', 'New' is selected. A search bar at the top right contains 'Search Setup'. The main content area displays a 'Custom Field Definition Detail' for a field named 'KDM Charge' on the 'Billing' object. The field information includes its label ('KDM Charge'), name ('KDM_Charge'), and API name ('KDM_Charge__c'). It also shows the formula: 'Billing Custom Field: KDM Charge ~ Salesforce - Developer Edition'. The data type is set to 'Formula' with 'Decimal Places' at 0.

Creating Formula Field in Billing Object

1. Go to setup >> click on Object Manager >> type object name (Billing) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Making Charges" and select formula return type as "Currency" and Decimal as " 2 " and click next.
5. Under Advanced Formula write down the formula : Item__r.Making_Charges__c
6. Click "Check Syntax" and Next >> Next >> Save & New.

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Fields & Relationships. Under 'Fields & Relationships', 'New' is selected. A search bar at the top right contains 'Search Setup'. The main content area displays a 'Custom Field Definition Detail' for a field named 'Making Charges' on the 'Billing' object. The field information includes its label ('Making Charges'), name ('Making_Charges'), and API name ('Making_Charges__c'). It also shows the formula: 'Billing Custom Field: Making Charges ~ Salesforce - Developer Edition'. The data type is set to 'Formula' with 'Decimal Places' at 2.

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Creating Formula Field in Billing Object

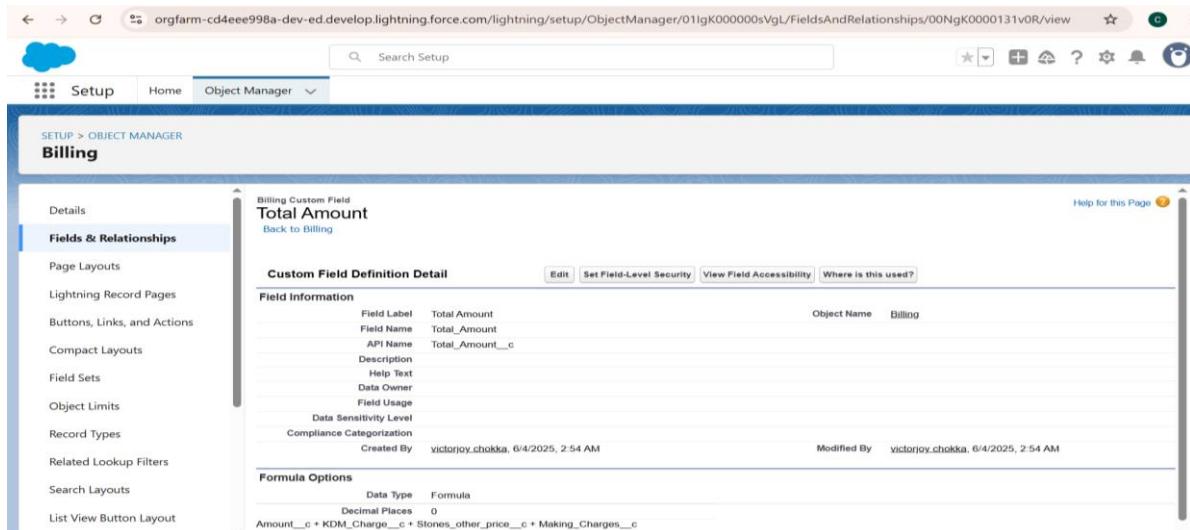
1. Go to setup >> click on Object Manager >> type object name (Billing) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Stones/other price" and select formula return type as "Currency" and Decimal as " 2 " and click next.
5. Under Advanced Formula write down the formula : Item__r.Stone_other_price__c
6. click "Check Syntax" and Next >> Next >> Save & New.

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

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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.



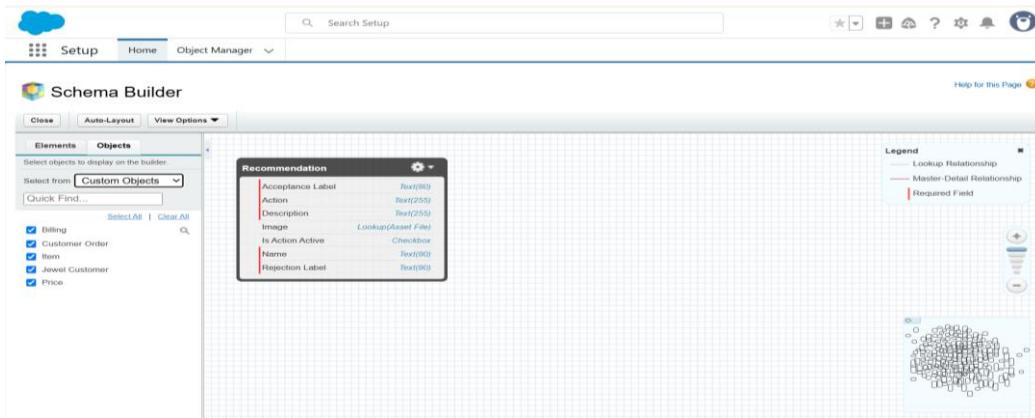
Schema Builder

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" is being created for the "Item" object. The field is defined as a picklist type with a default value of "1". Validation rules are being configured, with one rule named "Postal Code" being created for the "Zip_Postal_code_c" field.

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

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

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

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

NOTE:

Create One more Validation rule for Jewel Customer object.

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

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

CRM Application For Jewel Management

The screenshot shows the Salesforce Object Manager interface for the 'Jewel Customer' object. On the left, a sidebar lists various setup options like Object Limits, Record Types, and Validation Rules. The 'Validation Rules' option is selected. The main content area displays a validation rule named 'ValidationRule_For_JewelCustomerObject'. The rule is active and has the error condition formula: OR(ISBLANK(City__c), ISBLANK(Country__c), ISBLANK(Phone__c), ISBLANK(State__c), ISBLANK(Street__c)). The error message is 'Please fill Required fields'. The error location is set to 'Top of Page'. The rule was created by 'victorjoy_chokka' on 6/4/2025, 3:16 AM and modified by the same user on the same date.

Create Validation rule for Item object.

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

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

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

CRM Application For Jewel Management

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

The left sidebar lists various setup categories: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout.

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

Rule Name	ValidationRule_For_Item	Active
Error Condition Formula	OR(ISBLANK(Amount__c), ISBLANK(Customer_Name__c), ISBLANK(Gold_Price__c), ISBLANK(KDM__c), ISBLANK(Ornament__c), ISBLANK(Percentage__c), ISBLANK(Making_Charges__c), ISBLANK(Prices__c), ISBLANK(Stone_Weight__c), ISBLANK(Silver_Price__c), ISBLANK(Stone_Other_Price__c), ISBLANK(Stone_Weight__c), ISBLANK(Weight__c))	<input checked="" type="checkbox"/>
Error Message	Please fill Required fields	Error Location
Description		Top of Page
Created By	victorjoy_chokka, 6/4/2025, 3:18 AM	Modified By
		victorjoy_chokka, 6/4/2025, 3:18 AM

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

CRM Application For Jewel Management

MILESTONE-6

Profiles

Gold Smith Profile

To create a new profile:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (System Administrator) >> enter profile name (Gold Smith) >> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Jewel Customer, Item, Customer Order, Prices, Billings .
4. Scroll down and Click on Save.

The screenshot shows the Salesforce Setup Profiles page. The URL is orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egK000002OYn. The page title is "SETUP Profiles". On the left, there's a sidebar with "Setup", "Home", and "Object Manager". Under "Profiles", "Gold Smith" is selected. The main content area shows the "Profile Detail" for "Gold Smith". It includes fields for Name (Gold Smith), User License (Salesforce), Description, Created By (victorjoy_chokka, 6/4/2025, 3:20 AM), and Modified By (victorjoy_chokka, 6/6/2025, 10:29 AM). There are buttons for "Edit", "Clone", "Delete", and "View Users". Below this, the "Page Layouts" section shows "Standard Object Layouts" for Global, Email Application, and Home Page Layout, each with their respective assignments. There are also sections for "Location Group Assignment" and "Object Milestone". A "Help for this Page" link is at the top right.

Worker Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Salesforce Platform User) >> enter profile name (Worker) >> Save.
2. While still on the profile page, then click Edit.

CRM Application For Jewel Management

3. Scroll down to Custom Object Permissions and Give access permissions for Items, Price and Customer Order objects.
4. Scroll down and Click on Save.

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-cd4eee998a-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egK000002O0iT>. The page title is "Profiles". The left sidebar shows "profiles" under "Users" and "Profiles" is selected. The main content area displays the "Worker" profile details. The "Profile Detail" section includes fields for Name (Worker), User License (Salesforce Platform), Description, Created By (victorjoy.chokka, 6/4/2025, 3:30 AM), Modified By (victorjoy.chokka, 6/5/2025, 8:55 PM), and a "Custom Profile" checkbox which is checked. The "Page Layouts" section shows standard object layouts for Global, Lead, and Location. The Global layout is set to "Global Layout [View Assignment]". The Lead layout is set to "Lead Layout [View Assignment]". The Location layout is set to "Location Layout [View Assignment]". The Location Group layout is set to "Location Group Layout [View Assignment]". Buttons at the top right include "Edit", "Clone", "Delete", and "View Users". A note at the bottom states: "Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile." A link "Help for this Page" is also present.

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, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, ADMINISTRATION (with sub-links for Users, Data, Email), and PLATFORM TOOLS. The main area has a header 'SETUP Roles'. Below it, a section titled 'Role Gold Smith' shows the role details: Label 'Gold Smith', This role reports to 'None', Modified By 'victorjoy.chokka, 6/4/2025, 3:33 AM', Opportunity Access 'Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities', Case Access 'Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases', Role Name 'Gold_Smith', Role Name as displayed on reports 'Gold_Smith', Sharing Groups 'None', and Role, Role and Internal Subordinates 'None'. At the bottom, a table titled 'Users in Gold Smith Role' lists one user: Niklaus Mikaelson (Full Name), nmika (Alias), nikalus@mikaelson.com (Username), and Active (checkbox checked). There are buttons for Assign Users to Role and New User.

Note:

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

1. From setup >> Go to quick find >> Search for Roles >> click on set up roles.
2. Click on Expand All and click on add role under whom this role works.
3. Give Label as "Worker" and Role name gets auto populated. Check to whom this role () reports. Then click on Save.

CRM Application For Jewel Management

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

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

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

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

CRM Application For Jewel Management

MILESTONE-8

Users

Create User

1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
 1. First Name : Niklaus
 2. Last Name : Mikaelson
 3. Alias : Give a Alias Name
 4. Email id : Give your Personal Email id
 5. Username : Username should be in this form: text@text.text
 6. Nick Name : Give a Nickname
 7. Role : Gold Smith
 8. User licence : Salesforce
 9. Profiles : Gold Smith
 10. Save.

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded to show the 'Users' section under 'Setup'. The main content area displays the 'User Detail' page for a user named 'Niklaus Mikaelson'. The 'User Detail' table contains the following information:

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

CRM Application For Jewel Management

Create User

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

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

CRM Application For Jewel Management

Note:

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

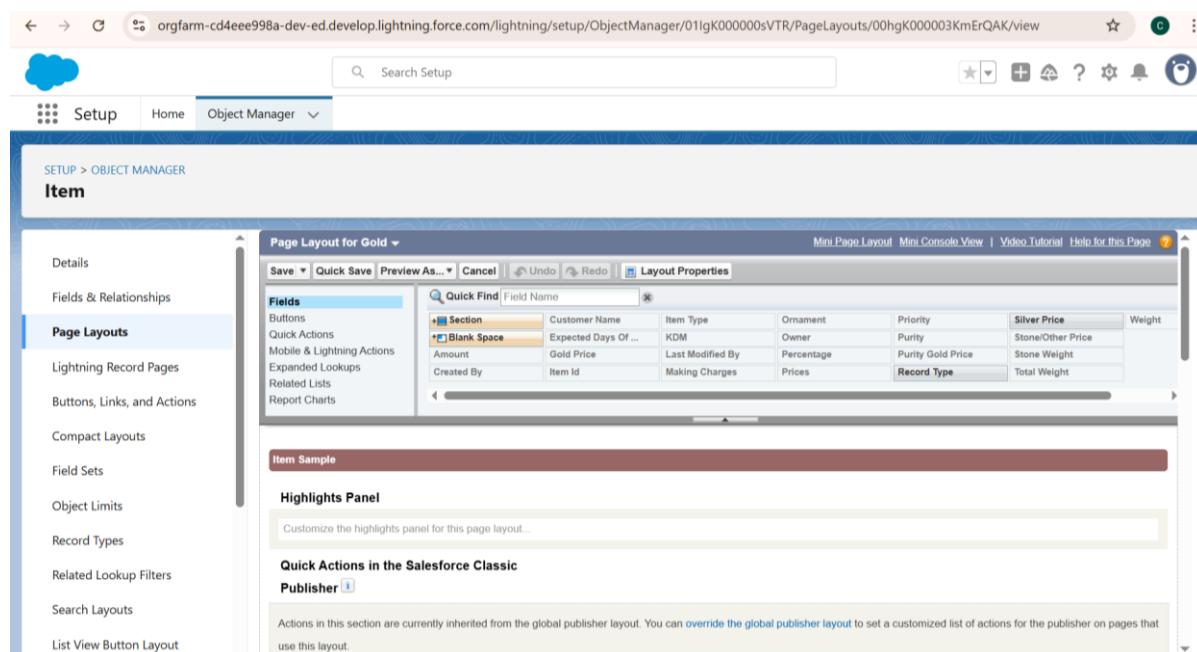
The screenshot shows the Salesforce Setup interface for managing users. The left sidebar is titled 'Setup' and includes sections for 'Users', 'Feature Settings', 'Prospector', 'Service', and 'Embedded Service'. The 'Users' section is currently selected. The main content area displays the 'User Detail' screen for a user named 'Akkala Harathi'. The 'User Detail' section contains fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, and Delegated Approver. To the right of these fields is a grid of checkboxes for various user roles and profiles, such as 'Worker', 'Salesforce Platform', 'Worker', 'Marketing User', etc. The 'Email' field shows 'cvictorjoy004@gmail.com [Verify]'. The 'Time Zone' is set to '(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)'. The 'Locale' is 'English (United States)'. The 'Language' is 'English'. The 'Delegated Approver' field is empty. The 'Role' column includes 'Worker', 'Salesforce Platform', 'Worker', 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Mobile Push Registrations', and 'Data.com User Type'. The 'Profile' column includes 'cvictorjoy004@gmail.com [Verify]', 'akkala@harathi.com', 'harathi [Link]', 'Company', 'Department', 'Division', 'Address', '(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)', 'English (United States)', 'English', and 'cvictorjoy004@gmail.com [Verify]'. The 'Active' checkbox is checked. The 'Edit' button is at the top of the detail section. The 'Sharing', 'Reset Password', 'Freeze', and 'View Summary' buttons are also present.

CRM Application For Jewel Management

MILESTONE-9 Page Layouts

To Create a Gold Page layout

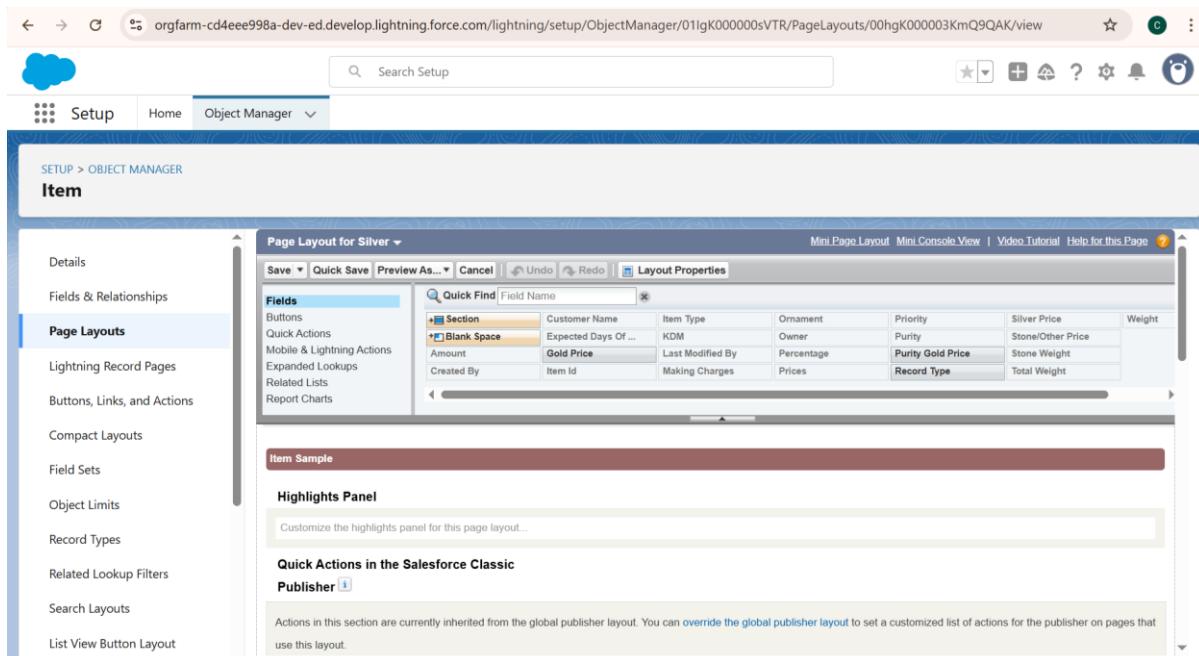
1. Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.
2. Click on Page layout >> Click on New.
3. Give Page layout Name as "Page Layout for Gold" and click on Save.
4. Arrange the field as shown in the Information Section ,remove fields which are related 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.



CRM Application For Jewel Management

MILESTONE-10

Record Types

To create a Record Type

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Click on the Record Types >> click New.
3. Select Existing Record as "Master", Record type Label as "Gold", Description as "Gold items information".
4. Uncheck for "Make Available".
5. Scroll down and check for the Gold Smith, Worker & System Administrator profile and click on Next.
6. Select "Apply a different layout for each profile", and change page layout to "Page Layout for Gold" for Gold Smith, Worker and System Administrator >> save & new.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is 'SETUP > OBJECT MANAGER Item'. On the left, a sidebar menu lists various object settings like Details, Fields & Relationships, Page Layouts, and Record Types (which is currently selected). The main content area displays the 'Record Type Gold' page. It shows the Record Type Label is set to 'Gold', the Record Type Name is 'Gold', and the Description is 'Gold items information'. The status is 'Active' with a checked checkbox. Below this, a section titled 'Picklists Available for Editing' lists three fields: 'Expected Days Of Return', 'Item Type', and 'Priority', each with an 'Edit' link and a modified date of '6/4/2025, 9:37 PM'.

CRM Application For Jewel Management

Note:

Create another Record Type with name "Silver" following the steps from Activity1
(Use page layout for Silver).

The screenshot shows the Salesforce Setup interface under the Object Manager. A new Record Type named 'Silver' has been created. The details are as follows:

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

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

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

CRM Application For Jewel Management

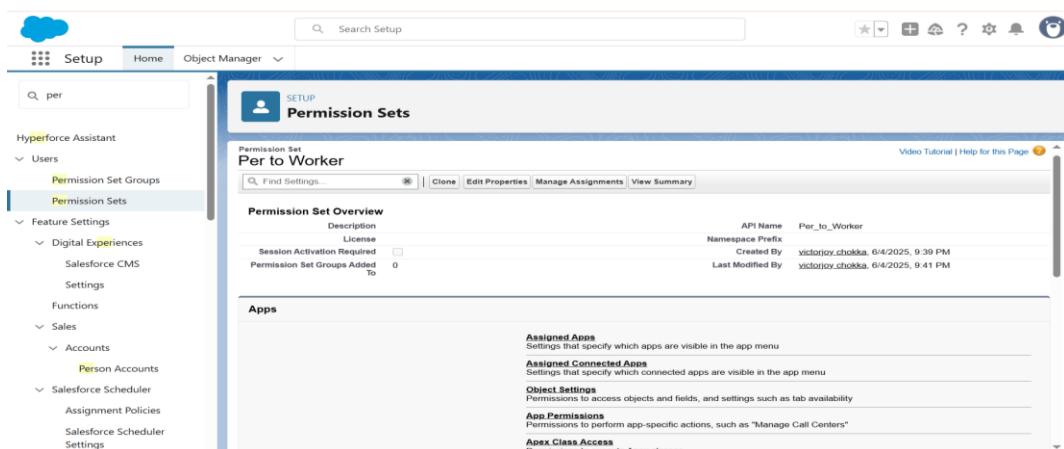
MILESTONE-11

Permission Sets

Creating permission set

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

1. Go to setup >> type "permission sets" in quick search >> select permission sets >> New.
2. Enter the label name as "Per to Worker", API will be auto populated >> save.
3. Under Apps Select object settings.
4. Click on Items object >> click on Edit >> under Item: Record Type Assignments, enable Gold, Silver >> Object permission check for read ,edit and create.
5. Click on Save.
6. After saving the permission click on the Manage assignment
7. Now click on the Add Assignment.
8. Now select the users which you have created in user milestone, using Worker profile and click on Next >> Assign >> Done.



CRM Application For Jewel Management

MILESTONE-12

Trigger

NOTE : create "Paid Amount", "Paying Amount " fields before create trigger.

Creating Currency(Paid Amount) Field in Billing Object

To create fields in an object:

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

Creating Formula(Paying Amount) Field in Billing Object

1. Go to setup >> click on Object Manager >> type object name (Billing) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "Paying Amount" and select formula return type as "Currency" and Decimal as " 2 " and click next.
5. Under Advanced Formula write down the formula : Total_Amount_c - Paid_Amount_c
6. click "Check Syntax" and Next >> Next >> Save & New.

Create a Trigger Handler class

CRM Application For Jewel Management

Trigger handler:

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

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

CODE:

```
public class UpdatePaidAmountTriggerHandler {  
    public static void handleBeforeInsert(List<Billing__c> newBillings) {  
        for (Billing__c billing : newBillings) {  
            billing.Paid_Amount__c = billing.Paying_Amount__c;  
        }  
    }  
  
    public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap,  
                                         List<Billing__c> updatedBillings) {  
        for (Billing__c billing : updatedBillings) {  
            Billing__c oldBilling = oldBillingsMap.get(billing.Id);  
            Decimal oldPaidAmount = oldBilling.Paid_Amount__c;  
            billing.Paid_Amount__c = oldPaidAmount + billing.Paying_Amount__c;  
        }  
    }  
}
```

CRM Application For Jewel Management

```

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

```

Create the trigger :

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

CODE:

trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {

```

if (Trigger.isInsert) {
    UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);
} else if (Trigger.isUpdate) {
    UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap,
Trigger.new);
}
}
```

```

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

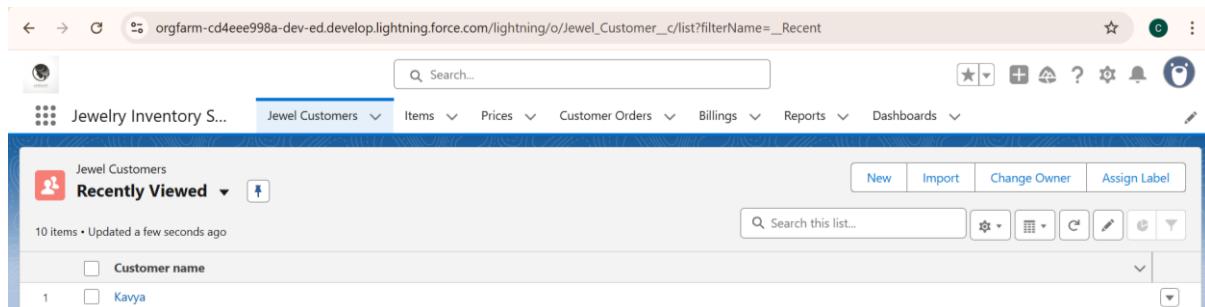
CRM Application For Jewel Management

MILESTONE-13

User Adoption

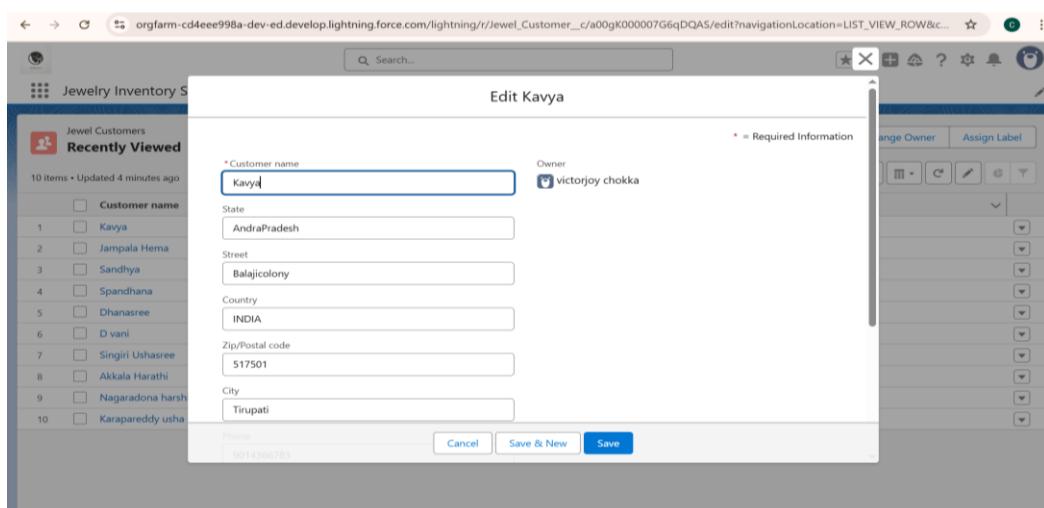
Create a Record (Jewel Customer)

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



View a Record (Jewel Customer)

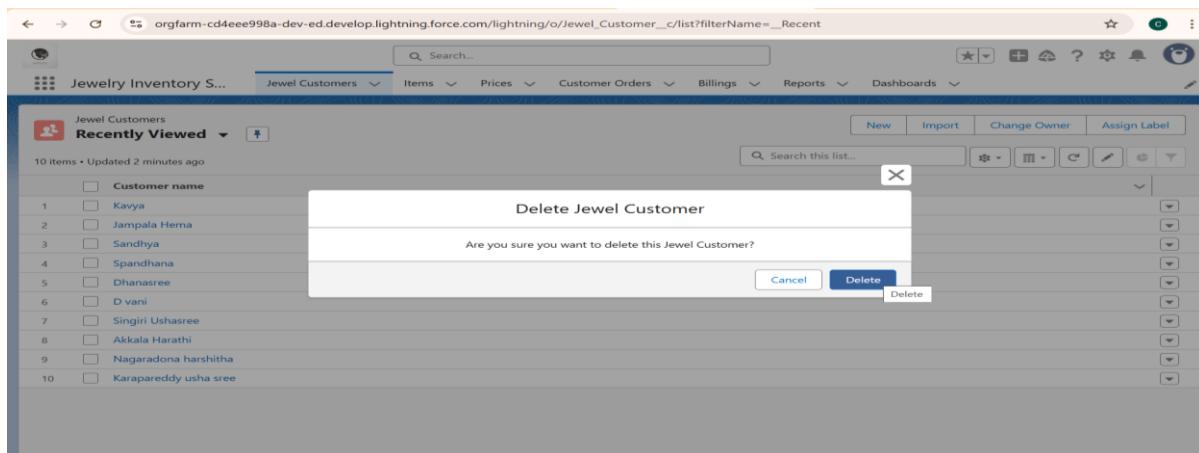
1. Click on App Launcher on the left side of the screen.
2. Search Jewelry Inventory System & click on it.
3. Click on the Jewel Customer Tab.
4. Click on any record name. you can see the details of the Jewel Customer.



CRM Application For Jewel Management

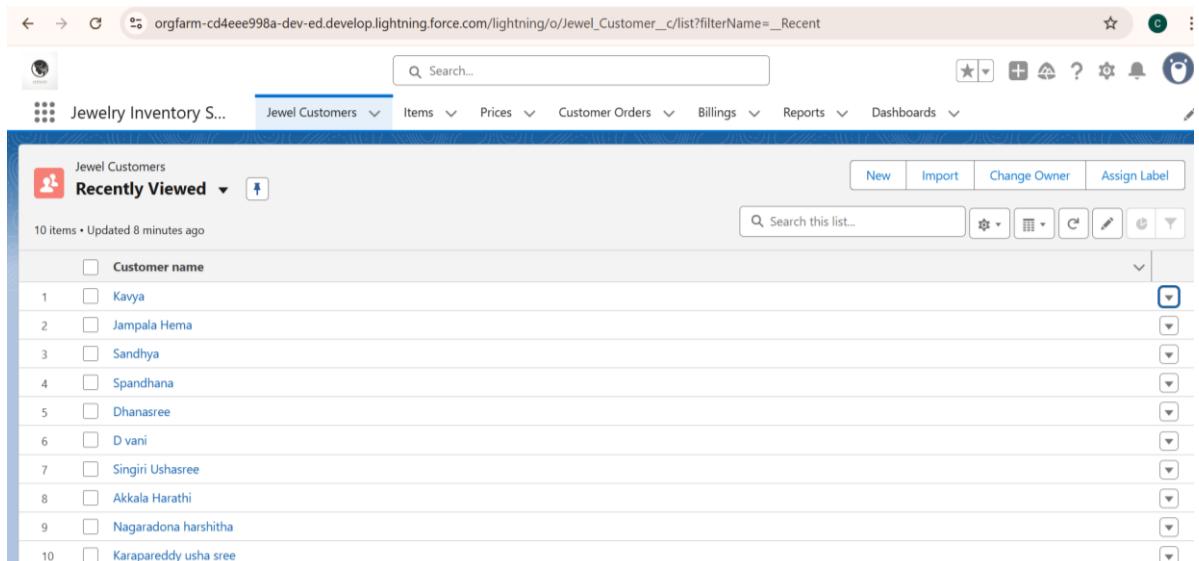
Delete a Record (Jewel Customer)

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



Note:

Create at least 10 records for each of the objects: Jewel Customer ,Price ,Item, Customer Order and Billing.



CRM Application For Jewel Management

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

The main content area is titled 'Items' and shows a list titled 'Recently Viewed'. It displays 10 items, each with a checkbox and a link: Item-01, Item-02, Item-03, Item-04, Item-05, Item-06, Item-07, Item-08, Item-09, and Item-10. A note at the top says '10 items • Updated a few seconds ago'. To the right of the list are several icons for filtering, sorting, and other actions. A search bar at the top right says 'Search this list...'.

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

The main content area is titled 'Prices' and shows a list titled 'Recently Viewed'. It displays 10 items, each with a checkbox and a link: Dhanasree, D vani, Kavya, Spandhana, Singiri Ushasree, Jampala Hema, Sandhya, Karapareddy usha sree, Akkala Harathi, and Nagaradona harshitha. A note at the top says '10 items • Updated a few seconds ago'. To the right of the list are several icons for filtering, sorting, and other actions. A search bar at the top right says 'Search this list...'.

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This screenshot shows the 'Customer Orders' list view. The top navigation bar includes links for Jewelry Inventory S..., Jewel Customers, Items, Prices, Customer Orders (which is selected), Billings, Reports, and Dashboards. A search bar at the top right says 'Search...'. Below the navigation is a toolbar with 'New', 'Import', and 'Assign Label' buttons. On the left, a sidebar lists 'Recently Viewed' items. The main area displays a table with 10 items, each with a checkbox and a link to 'Order - 0010' through 'Order - 0001'. A search bar at the bottom of the list says 'Search this list...'.

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

This screenshot shows the 'Billings' list view. The top navigation bar includes links for Jewelry Inventory S..., Jewel Customers, Items, Prices, Customer Orders, Billings (which is selected), 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. On the left, a sidebar lists 'Recently Viewed' items. The main area displays a table with 10 items, each with a checkbox and a link to 'Nagaradona harshitha' through 'Akkala Harathi'. A search bar at the bottom of the list says 'Search this list...'.

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

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

Reports

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

CRM Application For Jewel Management

New Billings with Item Report

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

New Items with Customer Orders Report

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

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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 dashboard titled "Jewel Management". The dashboard has three main components:

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

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

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

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

CRM Application For Jewel Management

MILESTONE-16

Flows

Create a Flow

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.
2. Select the Record-triggered flow and Click on Create.
3. Select the Object as a "Billing" in the Drop down list.
4. Select the Trigger Flow when: "A record is Created or Updated".
5. Select the Optimise the flow for: "Actions and Related Records" and Click on Done.
6. Now change the mode form Auto-layout to free-form.
7. Now select the manger option in the toolbox, click New resource.
8. Select the resource type as text template.
9. Enter the API name as " Email body".
10. Change the view as Rich Text >> View to Plain Text.
11. In the body field paste the syntax that is given below.

Hello

Customer Name: {!\$Record.Item__r.Customer_Name__r.Name}

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

Item Type: {!\$Record.Item__r.Item_Type__c}

Ornament: {!\$Record.Ornament__c}

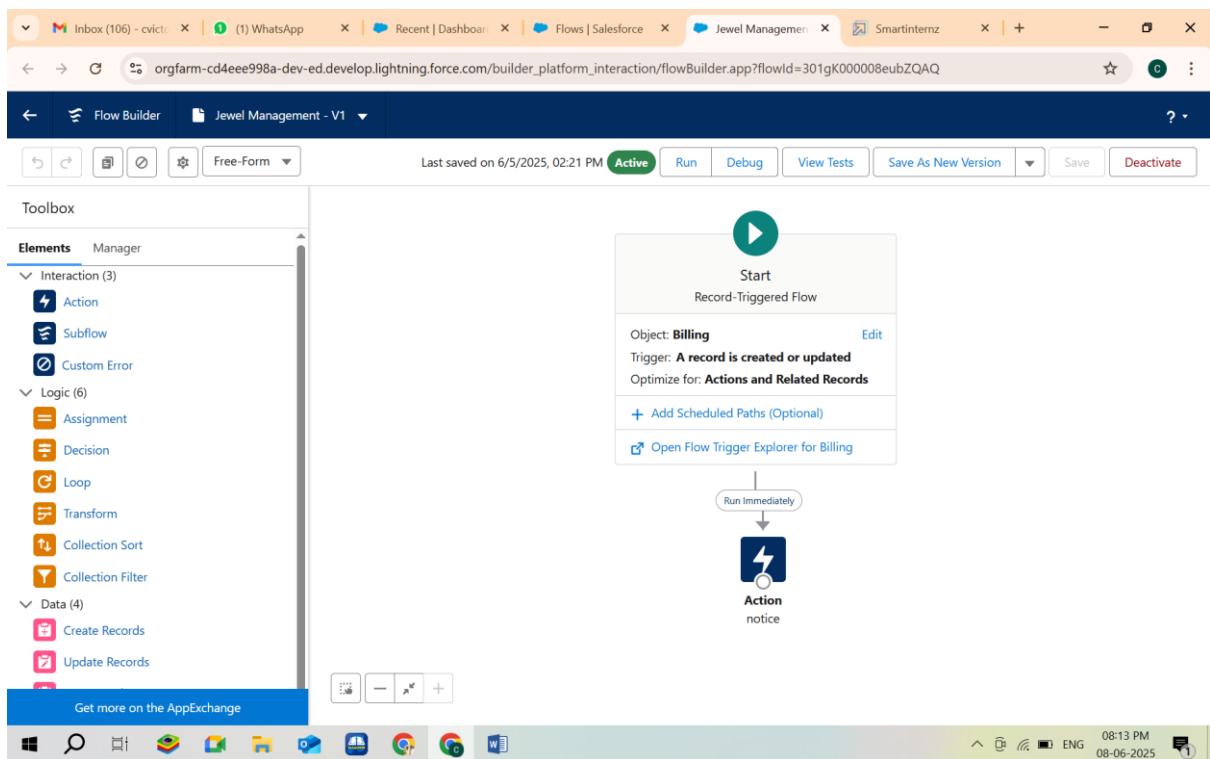
Weight: {!\$Record.Weight__c}grams

Amount: {!\$Record.Amount__c}

12. Click done.
13. Now click on elements, and drag the action element into the preview pane.
14. Their action bar will be opened in that search for " send email " and click on it.
15. Give the label name as " notice"
16. API name will be auto populated.

CRM Application For Jewel Management

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



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OUTPUT:

Jewel Management Tab:

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

New Jewel Management Details:

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

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Items Tab:

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

New Item Details:

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

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Prices Tab:

The screenshot shows the 'Prices' tab in a CRM application. The top navigation bar includes links for Jewelry Inventory S..., Jewel Customers, Items, Prices (selected), Customer Orders, Billings, Reports, and Dashboards. A search bar and various tool icons are also present. The main area displays a list titled 'Recently Viewed' with 10 items, each with a checkbox and a name: Dhanasree, D vani, Kavya, Spandhana, Singiri Ushasree, Jampala Hema, Sandhya, Karapareddy usha sree, Akkala Harathi, and Nagaradona harshitha. A toolbar at the top right of the list area includes 'New', 'Import', 'Change Owner', and 'Assign Label' buttons.

New Price Tab Details:

The screenshot shows the 'New Price' dialog box in the CRM application. The title bar says 'New Price'. The left sidebar shows the 'Recently Viewed' list with 10 items. The main form has a section labeled 'Information' with fields for 'Item Price' (Nagaradona harshitha), 'Silver Price' (\$1,500.00000), and 'Gold Price' (\$1,400.00000). A note indicates that the 'Owner' field is required, and it shows 'victorjoy chokka' assigned. At the bottom are 'Cancel', 'Save & New', and 'Save' buttons.

CRM Application For Jewel Management

Customer Orders Tab:

Customer Orders

Recently Viewed

10 items • Updated a few seconds ago

Customer Order No

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

New Import Assign Label

Search this list...

New Customer Order Details:

New Customer Order

* = Required Information

Information

Customer Order No

Customer: Nagaradona harshitha

Item: Item-03

Cancel Save & New Save

10 items • Updated 2 minutes ago

Customer Order No

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

Import Assign Label

CRM Application For Jewel Management

Billings Tab:

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

New Billing Tab Details:

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

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Reports Tab:

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

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

New Reports Tab Details:

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

Total Records: 10

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

CRM Application For Jewel Management

Dashboards Tab:

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

New Dashboards Details:

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