CRM application for jewel management

(developer)

By

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INTRODUCTION

About the project:

A “CRM Application for Jewel Management - (Admin)” aims to achieve several key objectives that ultimately contribute to the growth and efficiency of a jewelry business. The system specifically designed for jewelry business, allowing them to effectively track customer interactions, manage sales leads, and personalize marketing efforts optimize customer relationship and boost sales within the jewelry industry. Capture detailed customer information including demographics, purchase history, preferred jewelry types, special occasions, and contact details store and update customer data in real time to maintain accuracy.

The purpose of a CRM (Customer Relationship Management) system is to help businesses manage and improve their interactions with customers and potential customers. This overarching goal breaks down into several key objectives. CRM, or Customer Relationship Management, is a multifaceted concept that's essential for modern businesses. It's not just a piece of software it's a strategic approach to how a company interacts with its customers.The relationship between CRM (Customer Relationship Management) and CLV (Customer Lifetime Value) is very strong. CRM systems provide the tools and data necessary to effectively calculate, track, and ultimately increase CLV.

The Jewel Inventory System is a comprehensive software Solution designed to streamline and manage the inventory and sales processes of a jewellery store or a jewellery manufacturer. The system aims to provide an efficient and user-friendly solution to track and control the inventory of various jewellery items, maintain accurate records, and facilitate seamless sales transactions.

OBJECTIVES:

Creating an object in Salesforce organisation is essential for efficient data management and process automation.By defining custom objects, businesses can structure and store data specific to their needs, enabling streamlined workflows, personalised reporting, and enhanced user experiences. Objects serve as the foundation for organising and leveraging critical information within Salesforce.

IDEATION PHASE

In the ideation phase of developing a CRM application for jewelry management on Salesforce, the primary focus from a developer's perspective is to clearly define the core business use cases and begin mapping them to Salesforce's architecture.

The CRM will likely be used by jewelry store staff, sales reps, managers, and possibly repair technicians. Key requirements may include inventory management for high-value jewelry items, tracking customer purchases and preferences, managing warranties and repairs, and handling custom jewelry design requests.

These custom objects should be related to standard Salesforce entities such as Account and Contact to link jewelry purchases with customers. Additionally, relationships between items and their components (like gemstones) need to be modeled with care.

Automations will be critical to streamline processes, and Salesforce Flow can be used for tasks like warranty checks or appointment scheduling, while Apex triggers may handle more complex logic like dynamic pricing based on materials.

Developers should also focus on creating a clean, user-friendly interface using Lightning App Builder and Dynamic Forms, especially considering mobile use by sales staff on the showroom floor.From a tooling standpoint, developers should set up a Salesforce DX project using Scratch Orgs for modular and agile development, leverage Salesforce CLI and Visual Studio Code for coding, and manage versions using Git.

Ultimately, the goal of this ideation phase is to map out a scalable data model, define the core customizations, and plan the automation and integration points that will turn Salesforce into an effective, specialized CRM for jewelry business operations.

Salesforce key features and concepts utilized :

- Salesforce
- Object
- Tabs
- The Lightning App
- Fields
- Profiles
- Roles
- Users
- Page Layouts
- Record Types
- Permission Sets
- User Adoption

- ❖ Reports
- ❖ Dashboard
- ❖ Flow

<u>Salesforce</u>

Creating Developer Account:

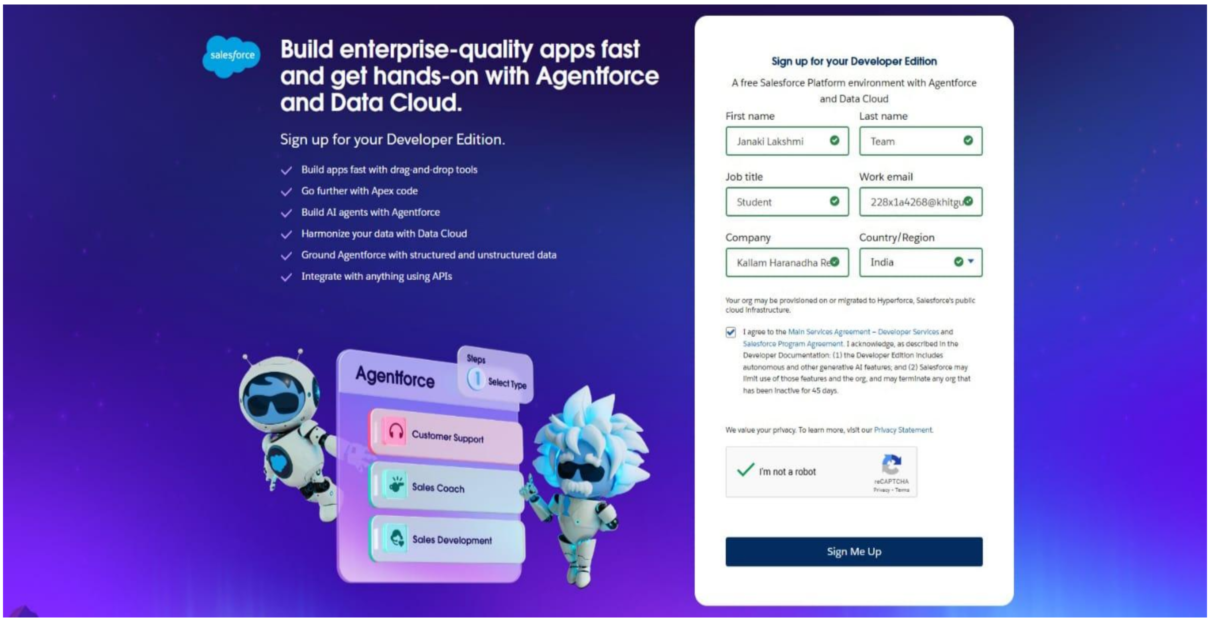
1)To create a developer account in Salesforce, follow these steps:

2)Go to Salesforce Developer Signup.

Fill in the signup form with the following details:

- First name & Last name
- Email
- Role: Developer
- Company: College Name
- Country: India
- Postal Code: Pin code

3)Click Sign me up



Activating the Account

Check the inbox of the email you used for signup.

Click on the verification link to activate your account (the email may take 5-10 minutes to arrive).

Click on Verify Account.

Set a password and answer a security question.

Click on Change Password.

You will be redirected to your Salesforce setup page.

Creating the Objects:

This report outlines the steps to create various custom objects in Salesforce, specifically for a Garage Management System. The objects include Customer Details, Appointments, Service Records, and Billing Details and Feedback. These objects will help streamline operations and improve data management within the system.

Customer Details Object

Navigation Path: From the setup page, click on Object Manager >> Create >> Custom Object.

Details:

Label Name: Customer Details

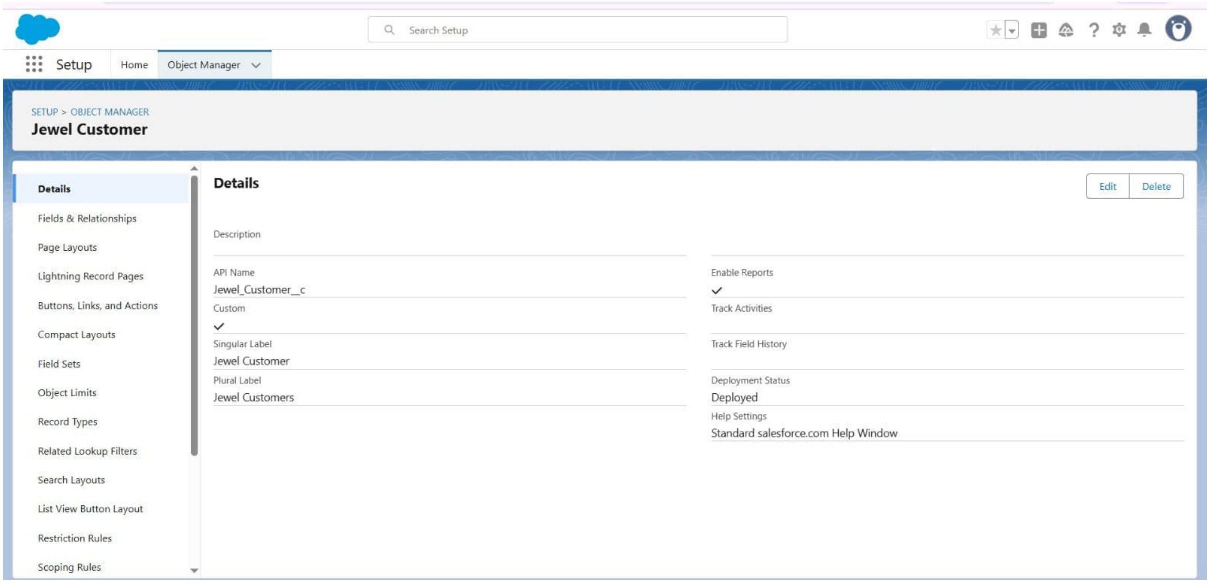
Plural Label Name: Customer Details

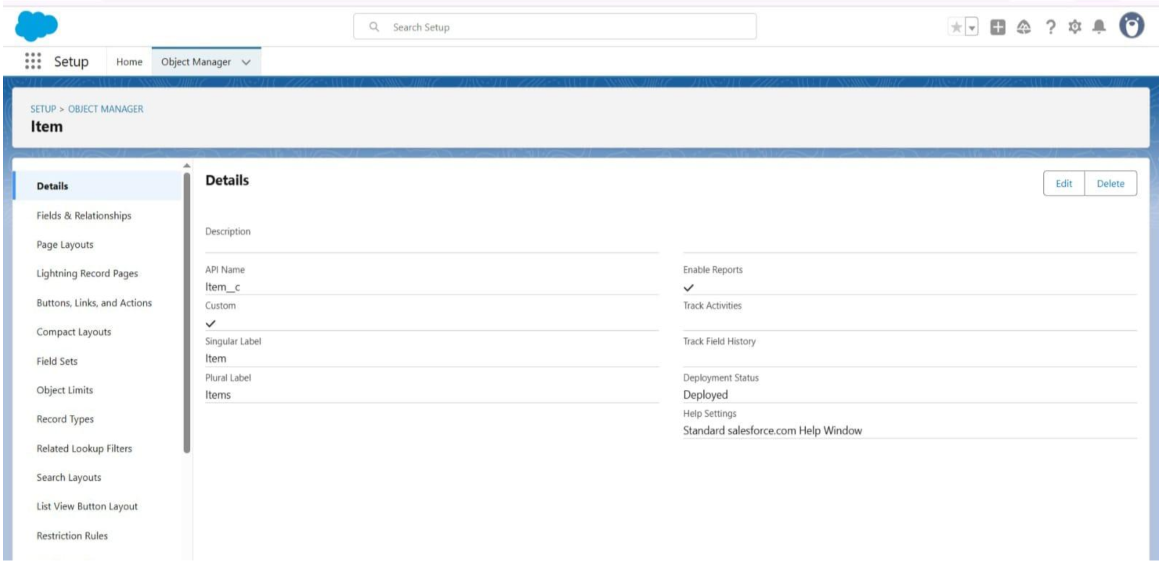
Record Name: Customer Name

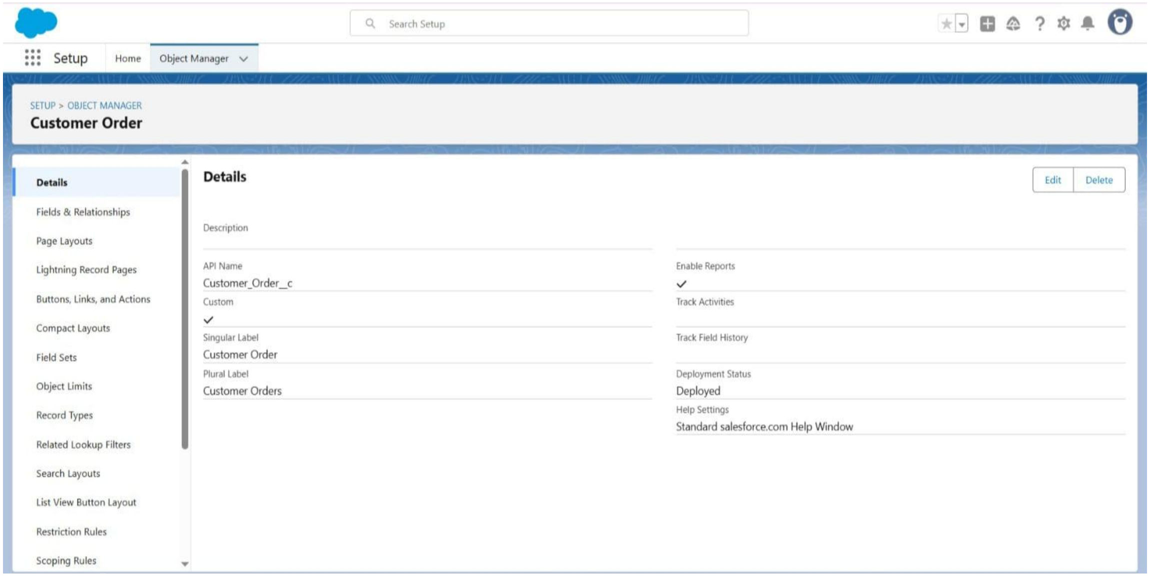
Data Type: Text

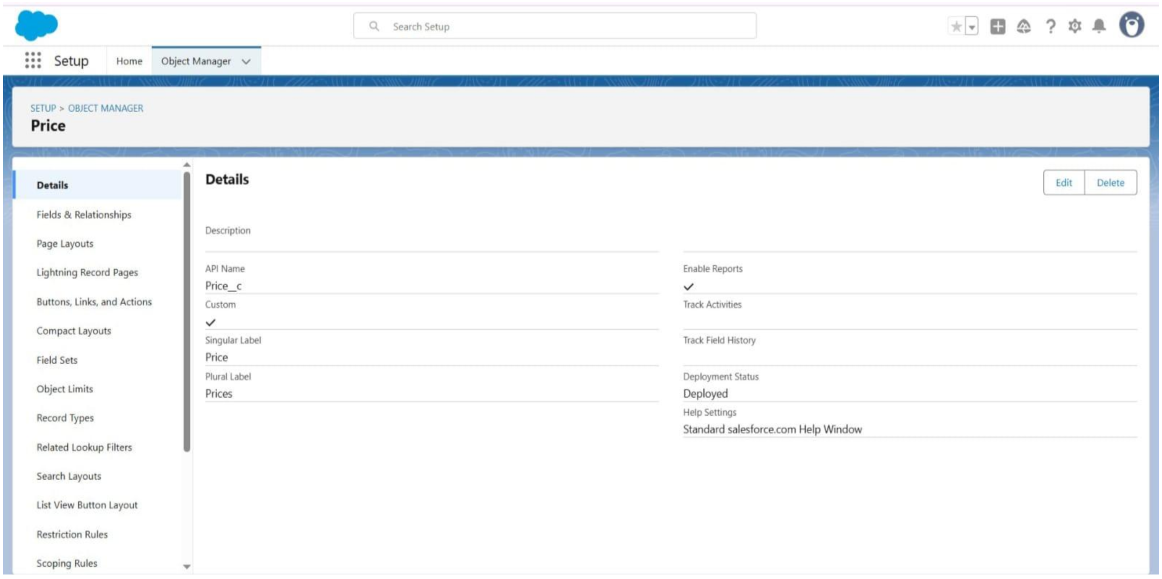
Options: Allow reports, Track Field History, Allow search

Save: Click Save to create the object




Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Item
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Details
Edit
Delete
Description
API Name
Item__c
Custom
Singular Label
Item
Plural Label
Items
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Customer Order
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Details
Edit
Delete
Description
API Name
Customer_Order__c
Custom
Singular Label
Customer Order
Plural Label
Customer Orders
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Price
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Details
Edit
Delete
Description
API Name
Price__c
Custom
Singular Label
Price
Plural Label
Prices
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

Tabs:

Creating a Custom Tab for Customer Details

Navigation Path: Go to the setup page.

Type "Tabs" in the Quick Find bar.

Click on "Tabs".

Click on "New" under the Custom Object Tabs.

Click Next.

Add to Profiles Page: Keep the default settings.

Click Next.

Add to Custom App: Uncheck "Include Tab".

Ensure "Append tab to users' existing personal customizations" is checked.

Click Save.

Creating Remaining Tabs (Appointments, Service Records, Billing Details and Feedback)

Repeat the above steps for each remaining object: Appointments, Service Records, and Billing Details and Feedback.

Navigation Path:

Go to the setup page.

Type "Tabs" in the Quick Find bar.

Click on "Tabs".

Click on "New" under the Custom Object Tabs.

Details for Each Object:

Select Object: Choose the respective object (Appointments, Service Records, Billing Details and Feedback).

Select Tab Style: Choose a suitable style for each object.

Click Next.

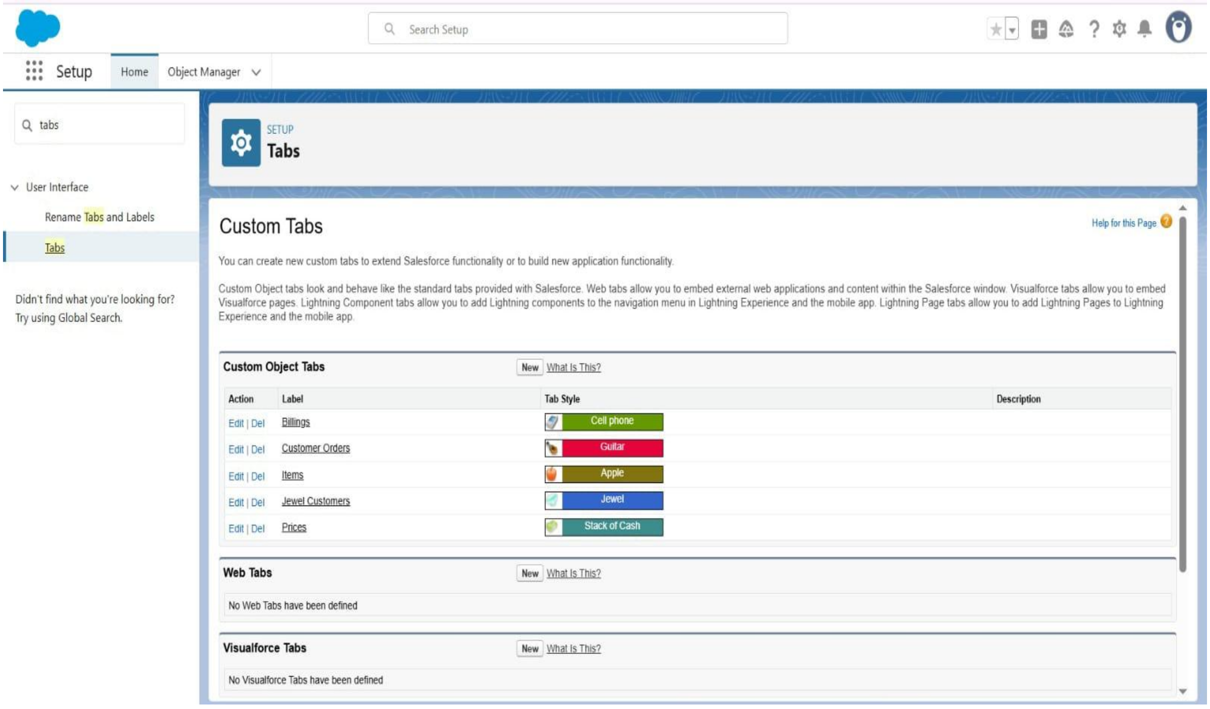
Add to Profiles Page: Keep the default settings.

Click Next.

Add to Custom App: Uncheck "Include Tab".

Ensure "Append tab to users' existing personal customizations" is checked.

Click Save.



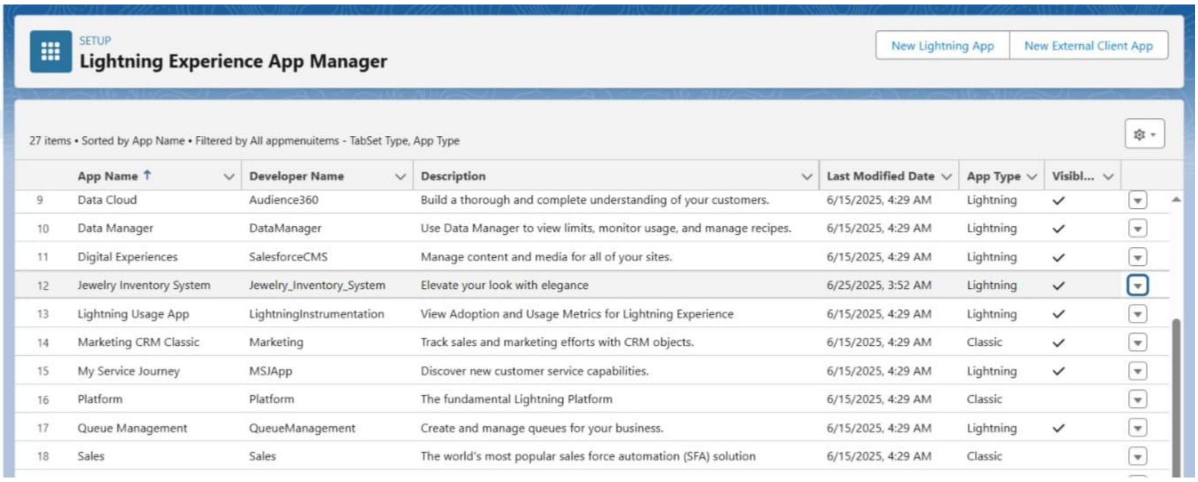
<u>The Lightning App:</u>

Creating a Lightning App in Salesforce for managing garage operations allows for streamlined processes and efficient management of various business aspects.

This guide outlines the steps to create the Garage Management Application, including adding essential navigation items and user profiles.

Steps to Create a Lightning App

Accessing App Manager:Begin by navigating to the setup page. In the Quick Find bar, search for "App Manager" and select it. Click on "New Lightning App" to start the creation process.



SETUP
Lightning Experience App Manager
New Lightning App | New External Client App

27 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

	App Name	Developer Name	Description	Last Modified Date	App Type	Visibl...
9	Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	6/15/2025, 4:29 AM	Lightning	✓
10	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	6/15/2025, 4:29 AM	Lightning	✓
11	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	6/15/2025, 4:29 AM	Lightning	✓
12	Jewelry Inventory System	Jewelry_Inventory_System	Elevate your look with elegance	6/25/2025, 3:52 AM	Lightning	✓
13	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	6/15/2025, 4:29 AM	Lightning	✓
14	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	6/15/2025, 4:29 AM	Classic	✓
15	My Service Journey	MSJApp	Discover new customer service capabilities.	6/15/2025, 4:29 AM	Lightning	✓
16	Platform	Platform	The fundamental Lightning Platform	6/15/2025, 4:29 AM	Classic	
17	Queue Management	QueueManagement	Create and manage queues for your business.	6/15/2025, 4:29 AM	Lightning	✓
18	Sales	Sales	The world's most popular sales force automation (SFA) solution	6/15/2025, 4:29 AM	Classic	

<u>Fields:</u>

1.Define the Core Use Case

2. Core Features to Plan

3. Technical Planning (Developer Focus)

4. Integration Planning

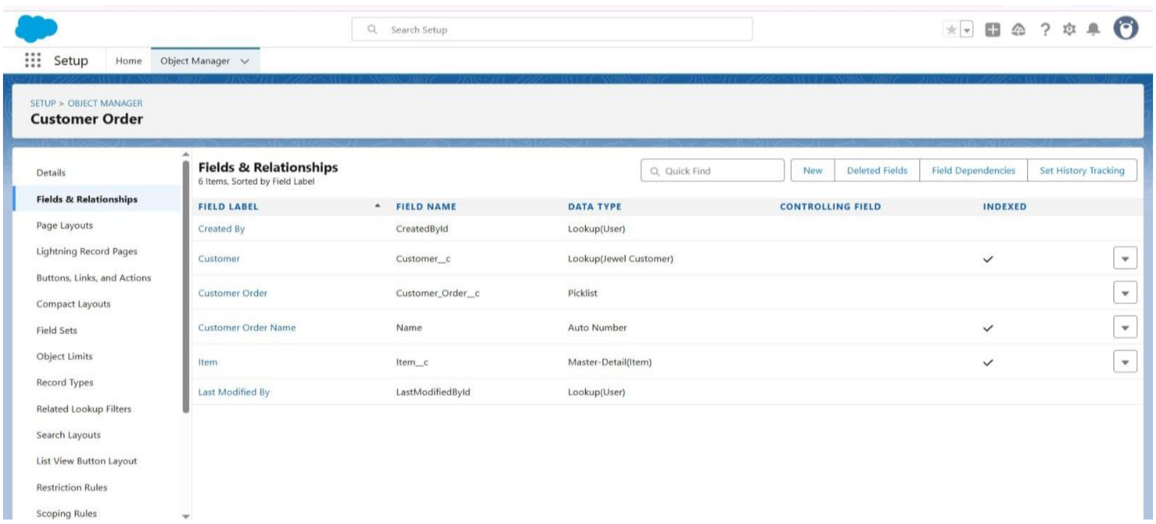
5. Security & Compliance

6. Tooling & Dev Environment

7.Standard Fields

8.Custom Fields

9.Field Types in Salesforce

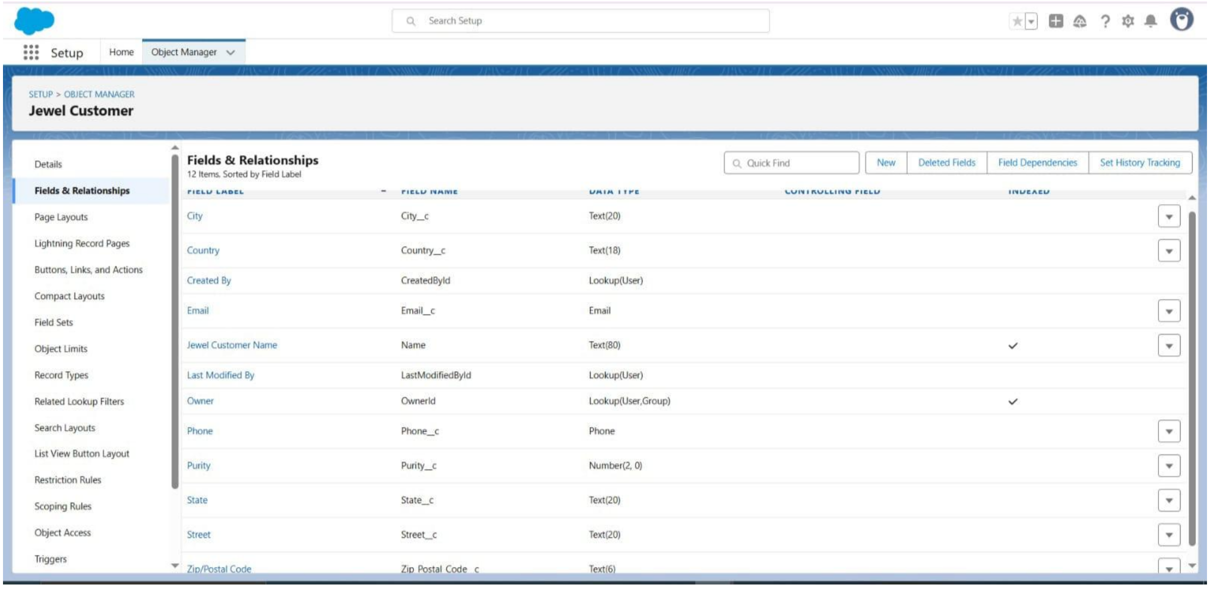


Search Setup
Setup | Home | Object Manager
SETUP > OBJECT MANAGER
Customer Order

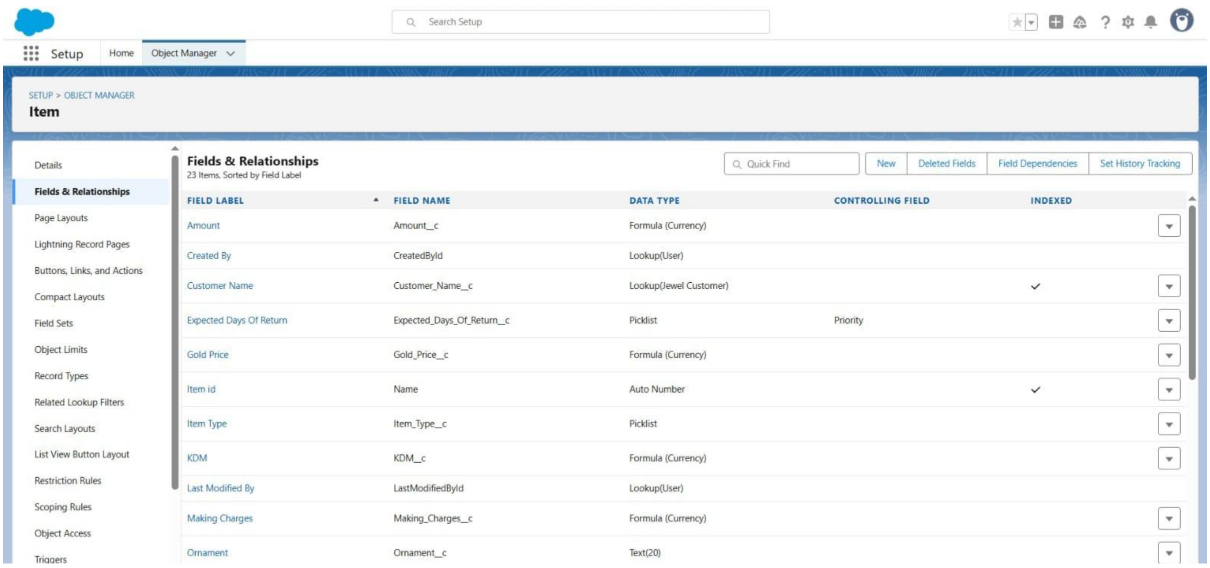
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules

Fields & Relationships
6 Items, Sorted by Field Label
Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

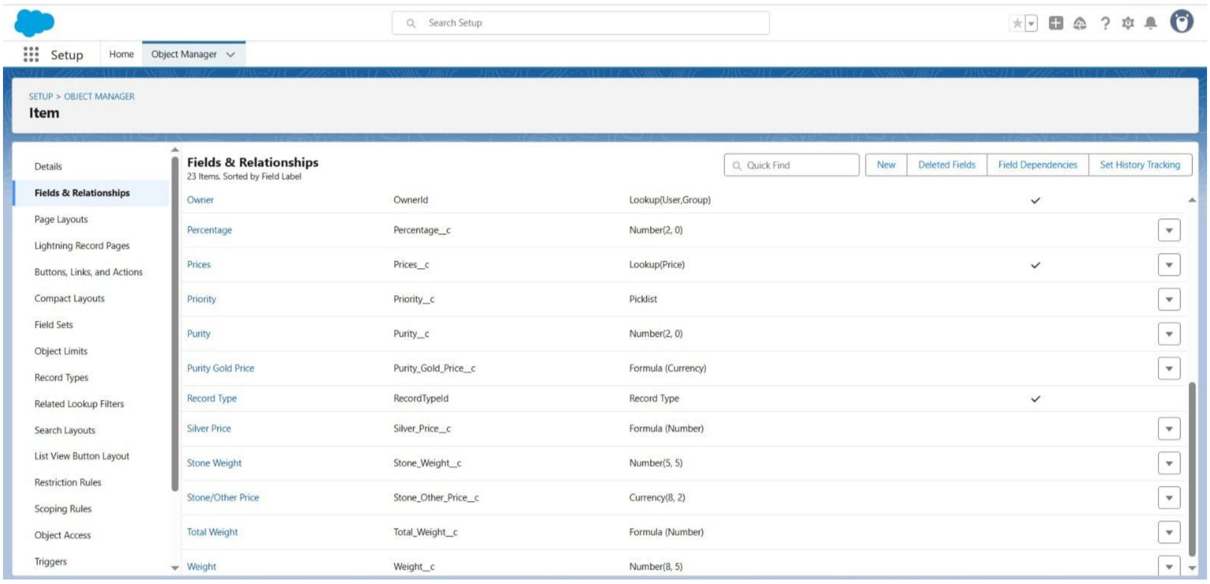
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Jewel Customer)		✓
Customer Order	Customer_Order__c	Picklist		
Customer Order Name	Name	Auto Number		✓
Item	Item__c	Master-Detail(Item)		✓
Last Modified By	LastModifiedById	Lookup(User)		



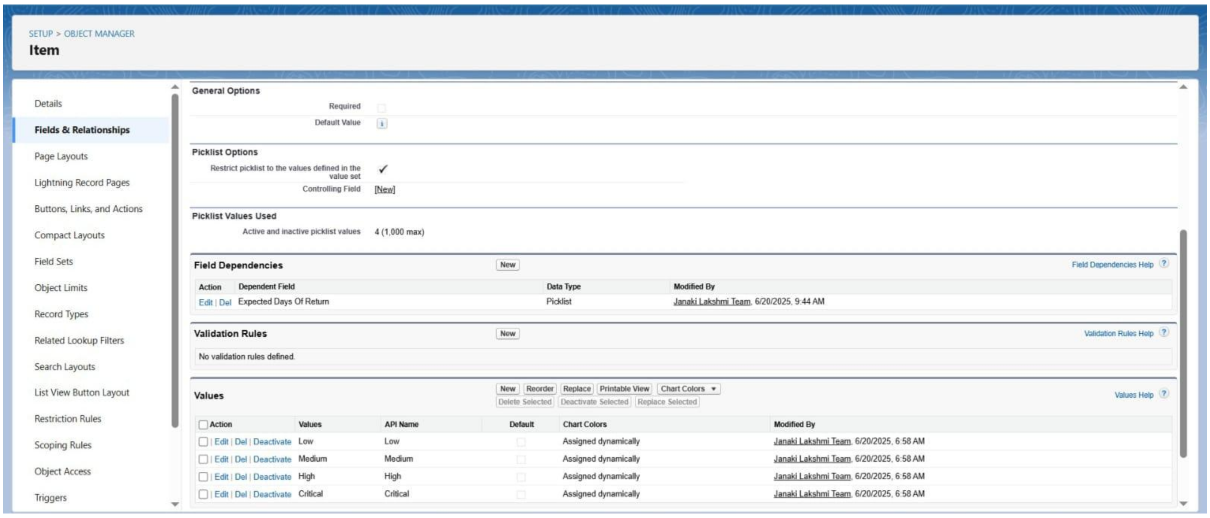
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Country	Country__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Jewel Customer Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
Purity	Purity__c	Number(2, 0)		
State	State__c	Text(20)		
Street	Street__c	Text(20)		
Zip/Postal Code	Zip_Postal_Code__c	Text(6)		



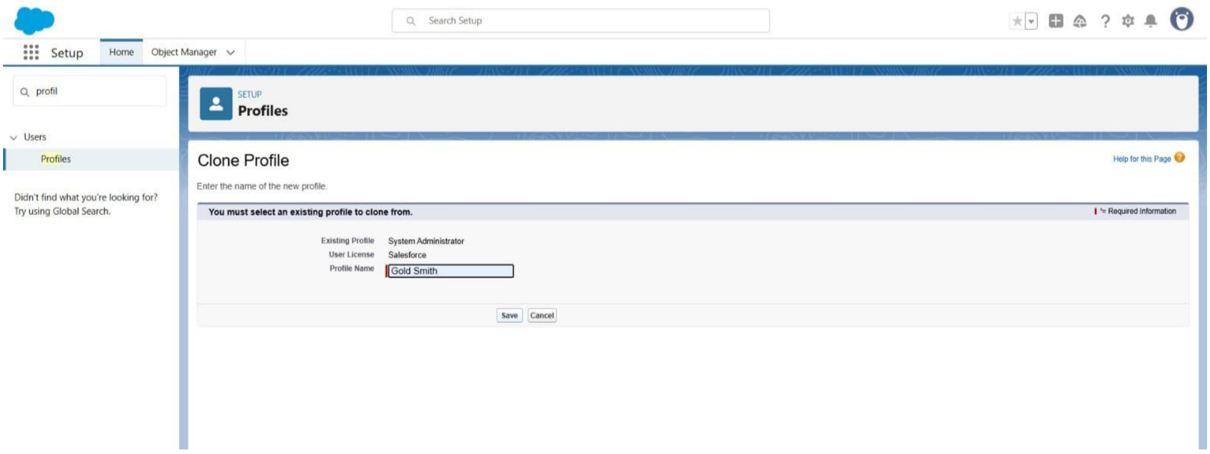
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Customer Name	Customer_Name__c	Lookup(Jewel Customer)		✓
Expected Days Of Return	Expected_Days_Of_Return__c	Picklist	Priority	
Gold Price	Gold_Price__c	Formula (Currency)		
Item id	Name	Auto Number		✓
Item Type	Item_Type__c	Picklist		
KDM	KDM__c	Formula (Currency)		
Last Modified By	LastModifiedById	Lookup(User)		
Making Charges	Making_Charges__c	Formula (Currency)		
Ornament	Ornament__c	Text(20)		

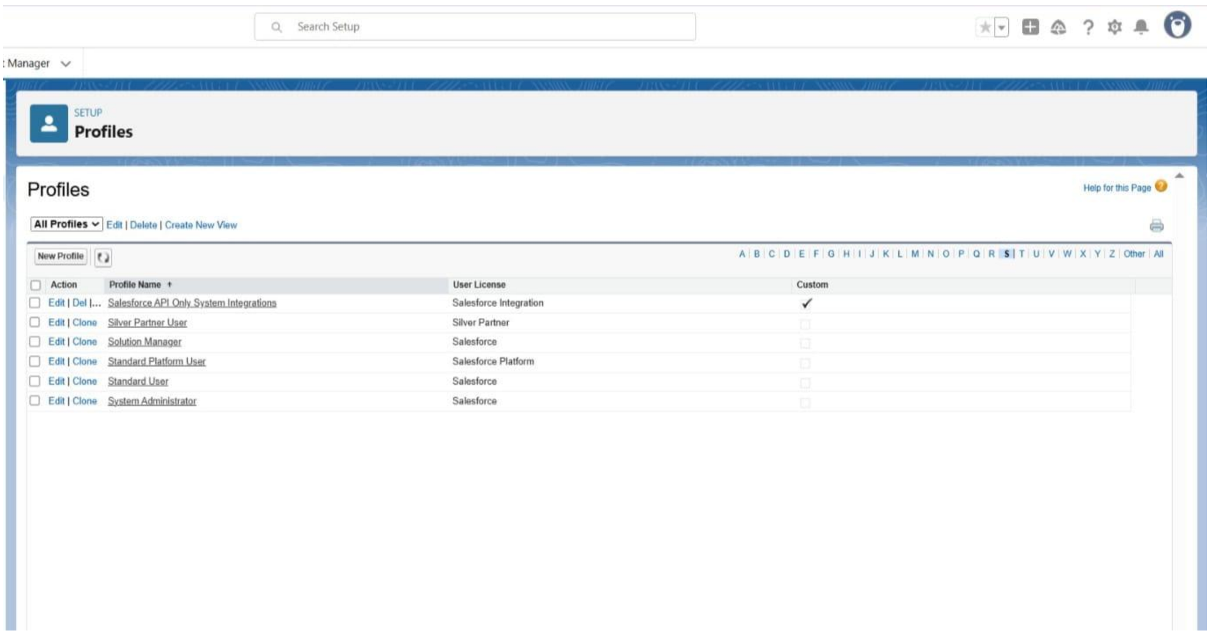


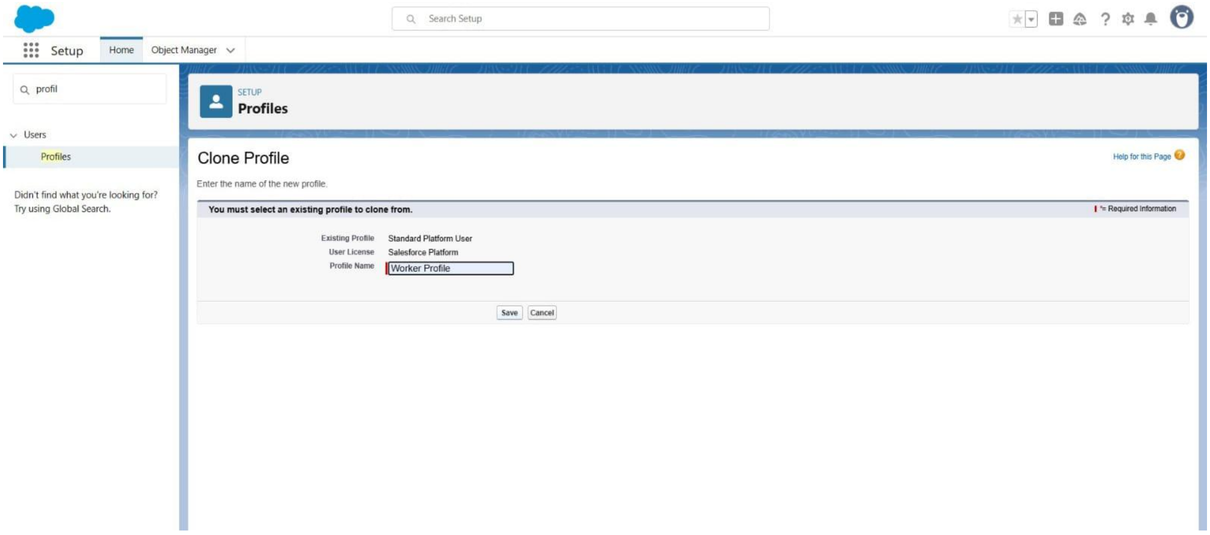
Owner	OwnerId	Lookup(User,Group)		✓
Percentage	Percentage__c	Number(2, 0)		
Prices	Prices__c	Lookup(Price)		✓
Priority	Priority__c	Picklist		
Purity	Purity__c	Number(2, 0)		
Purity Gold Price	Purity_Gold_Price__c	Formula (Currency)		
Record Type	RecordTypeId	Record Type		✓
Silver Price	Silver_Price__c	Formula (Number)		
Stone Weight	Stone_Weight__c	Number(5, 5)		
Stone/Other Price	Stone_Other_Price__c	Currency(8, 2)		
Total Weight	Total_Weight__c	Formula (Number)		
Weight	Weight__c	Number(8, 5)		


SETUP > OBJECT MANAGER
Item
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
General Options
Required
Default Value
Picklist Options
Restrict picklist to the values defined in the value set
Controlling Field [New]
Picklist Values Used
Active and inactive picklist values 4 (1,000 max)
Field Dependencies
New
Field Dependencies Help
Action Dependent Field Data Type Modified By
Edit | Del Expected Days Of Return Picklist Janaki Lakshmi Team, 6/20/2025, 9:44 AM
Validation Rules
New
Validation Rules Help
No validation rules defined.
Values
New Reorder Replace Printable View Chart Colors
Delete Selected Deactivate Selected Replace Selected
Values Help
Action Values API Name Default Chart Colors Modified By
Edit | Del | Deactivate Low Low Assigned dynamically Janaki Lakshmi Team, 6/20/2025, 6:58 AM
Edit | Del | Deactivate Medium Medium Assigned dynamically Janaki Lakshmi Team, 6/20/2025, 6:58 AM
Edit | Del | Deactivate High High Assigned dynamically Janaki Lakshmi Team, 6/20/2025, 6:58 AM
Edit | Del | Deactivate Critical Critical Assigned dynamically Janaki Lakshmi Team, 6/20/2025, 6:58 AM

Profiles:


Search Setup
Setup
Home
Object Manager
profil
Users
Profiles
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile.
You must select an existing profile to clone from.
= Required Information
Existing Profile System Administrator
User License Salesforce
Profile Name Gold Smith
Save Cancel

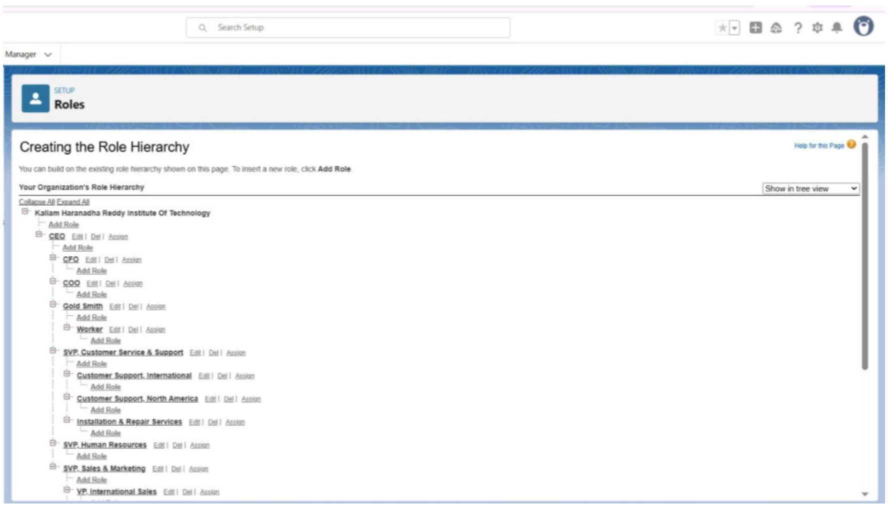

Search Setup
Manager
SETUP
Profiles
Profiles
Help for this Page
All Profiles
Edit | Delete | Create New View
New Profile
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
Action Profile Name User License Custom
Edit | Del |... Salesforce API Only System Integrations Salesforce Integration ✓
Edit | Clone Silver Partner User Silver Partner
Edit | Clone Solution Manager Salesforce
Edit | Clone Standard Platform User Salesforce Platform
Edit | Clone Standard User Salesforce
Edit | Clone System Administrator Salesforce



Roles:

In Salesforce, roles are a fundamental part of the platform's security model, primarily used to control record-level access based on a user's position within an organization. Users higher in the hierarchy automatically gain visibility into the records owned by users beneath them. For example, in a jewelry business CRM, a sales rep might only see their own sales records, a store manager would see records for their entire store, and a regional manager would see all store data in their region.

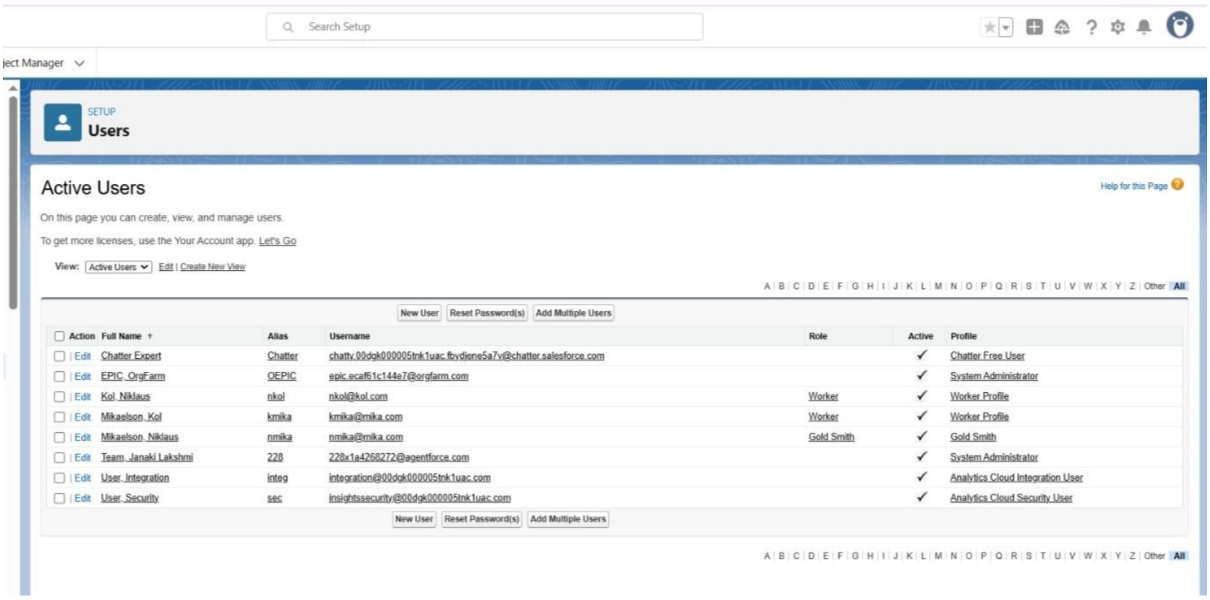
Roles are often used in combination with other sharing settings like organization-wide defaults (OWD), sharing rules, and manual sharing to fine-tune access. Roles are managed via Salesforce Setup, where administrators can create new roles, define hierarchies, and assign users to appropriate roles during or after user setup.



Users:

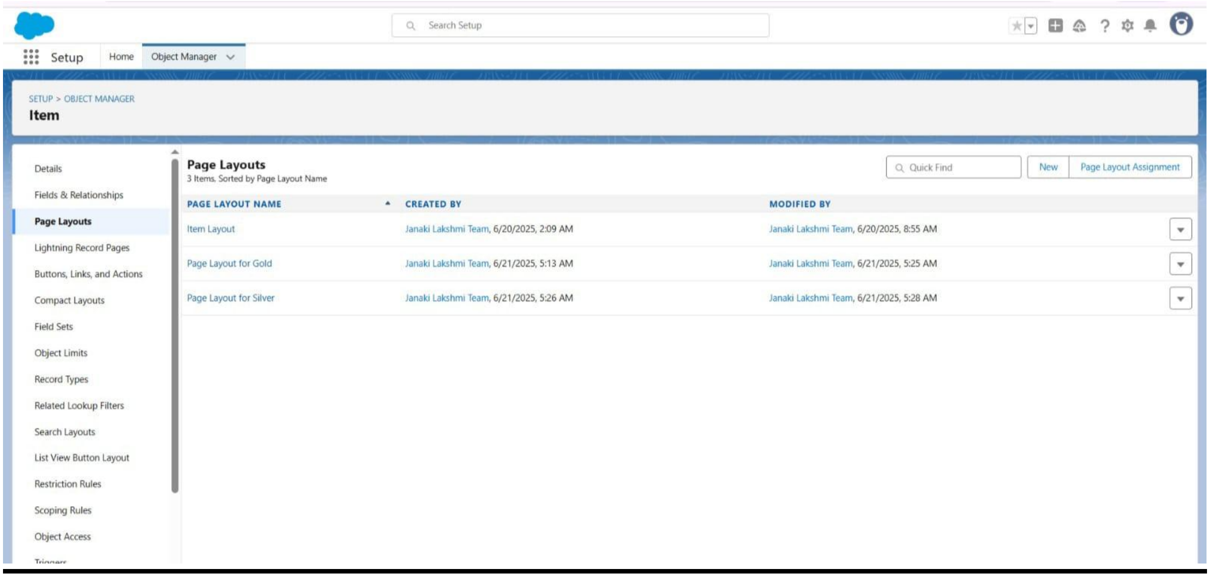
In Salesforce, **users** are individuals who have **access to the system** and interact with data, applications, and features based on the **permissions and roles** assigned to them. Each user is identified by a unique **username (email format)** and has a **user record** that includes details like name, email, role, profile, license, and login history.

A user in Salesforce represents a person who can log in and use the platform, whether it's an employee, partner, or community member.In addition to profiles, users may also have permission sets for extra access and a role that determines what records they can see based on the organization's role hierarchy. For example, in a jewelry CRM, a "Sales Rep" user might have access to customer and order objects but only see records they own, while a "Store Manager" can view records across the entire store.Users are also linked to a user license, which determines what features and objects they can access. Admins can create and manage users via the Setup menu, where they can activate/deactivate users, reset passwords, assign permission sets, and monitor login activity. Salesforce also supports different user types, including internal users (employees), external users (partners or customers), and automated users (like API integrations). Managing users effectively is crucial for maintaining system security, performance, and compliance.



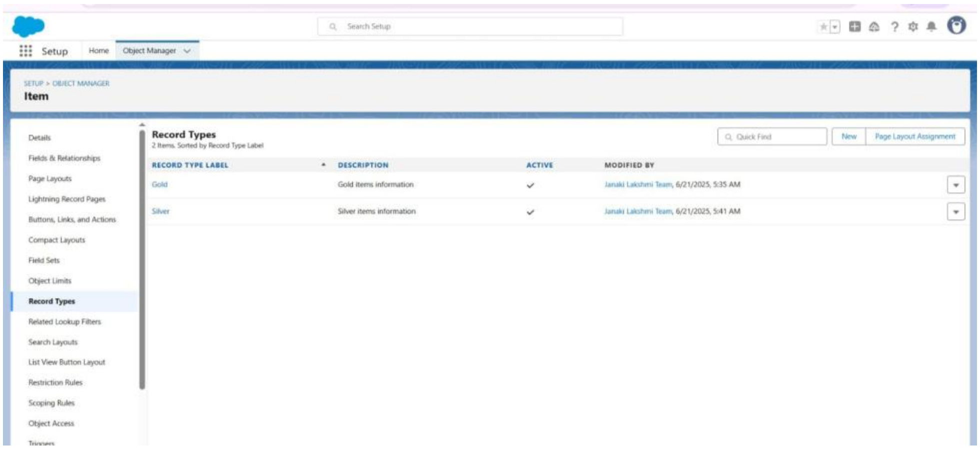
Page Layouts:

Page Layouts in Salesforce are used to customize how information is displayed on the record pages of standard and custom objects. They define the arrangement of fields, sections, related lists, custom buttons, links, and Visualforce or Lightning components. For example, in a jewelry CRM system, a Jewelry_Item page layout might include sections for basic item details, gemstone specifications, pricing, and repair history. Page Layouts also control which fields are read-only, required, or visible, ensuring users only see what's relevant to their role.



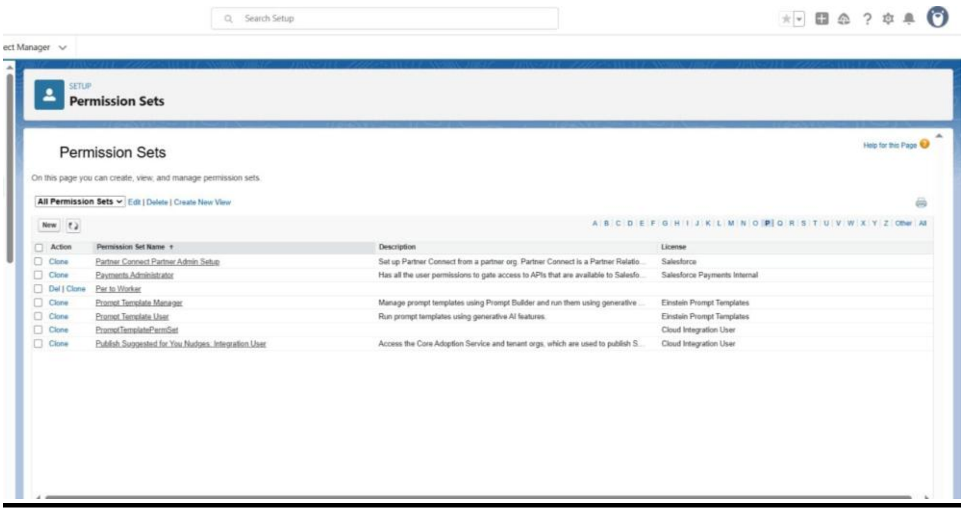
Record Types:

In Salesforce, record types allow you to create different business processes, page layouts, and picklist values for the same object, helping tailor the system to varied user needs or product lines within one organization. They are especially useful when a single object serves multiple purposes that require distinct data capture or workflows**.**



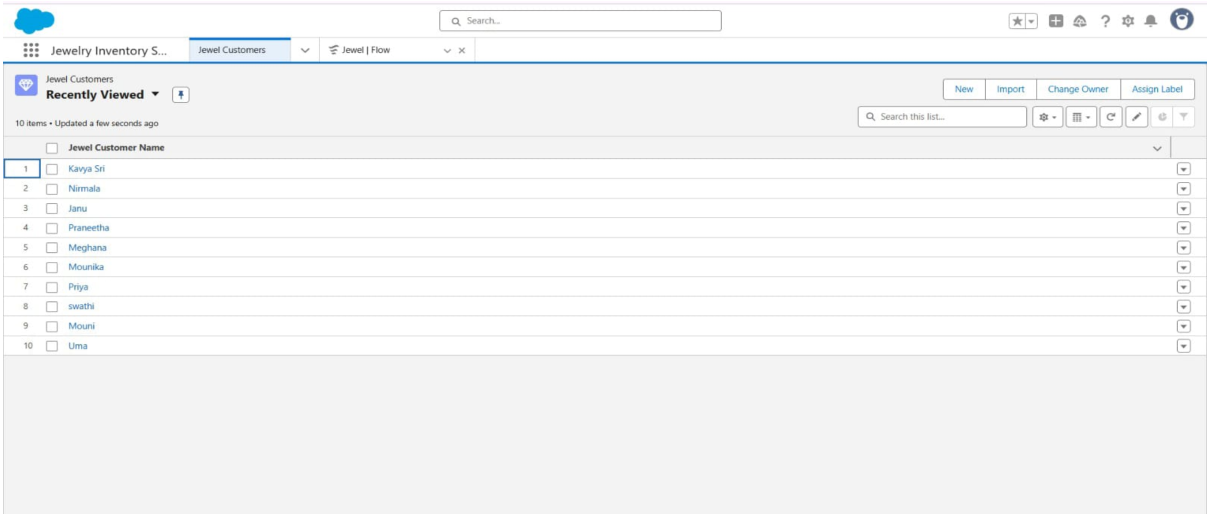
Permission Sets :

A standard permission set consists of a group of common permissions for a particular feature associated with a permission set licence. Using a standard permission set saves you time and facilitates administration because you don't need to create the custom permission set. We created permission sets and labeled as “Per to Worker “and selected object permissions for “Read, Edit, Create”.



User Adoption:

As a new Administrator, you perform user management tasks like creating and editing users, resetting passwords, granting permissions, configuring data access, and much more. We created some jewel customers, items, billings, prices,customer orders in Jewelry Inventory System



Reports:

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others.

Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce

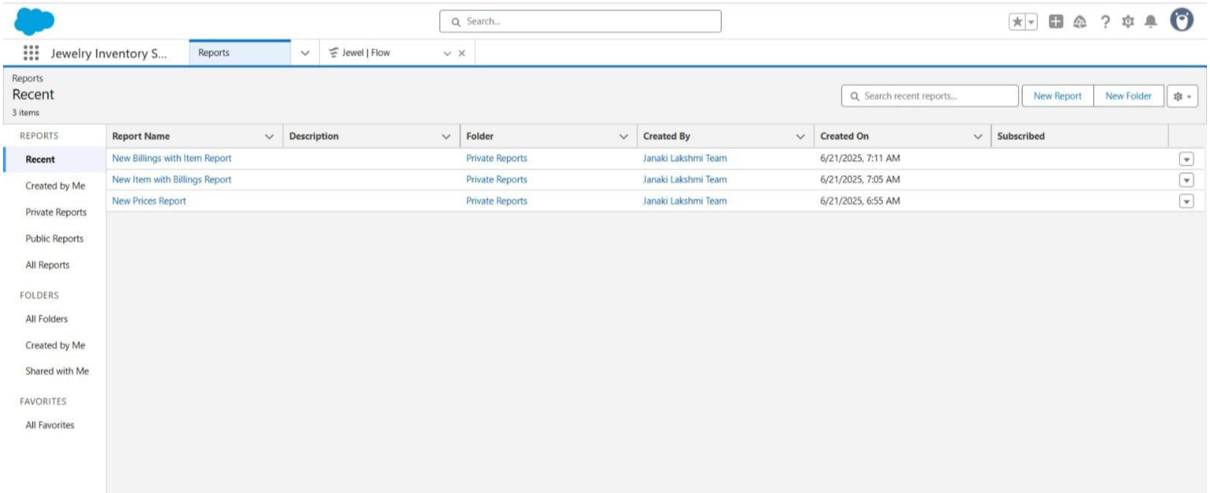
1. Tabular
2. Summary
3. Matrix
4. Joined Reports

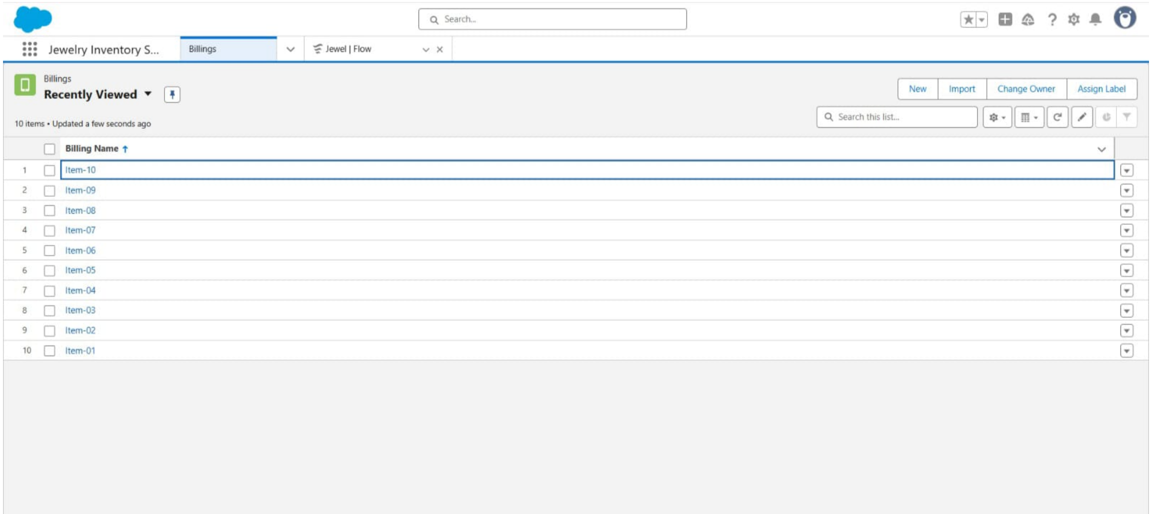
The GoldSmith of an organisation wants to have a brief data on Gold Items,Silver Items,Customer Orders and Billings.

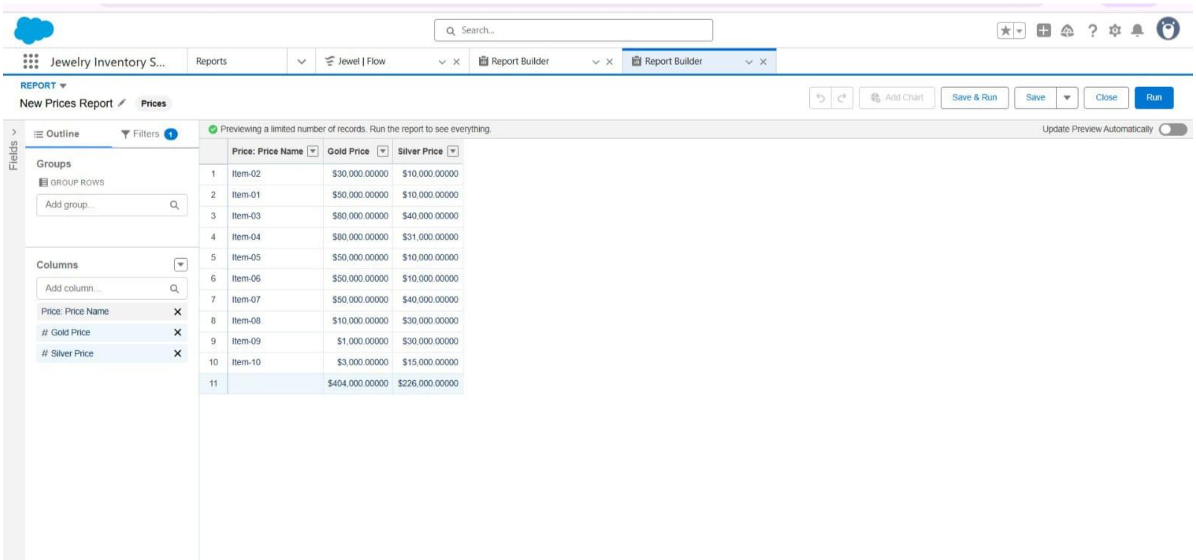
So he can have a clear picture of his organisation and be able to make any decisions required based on this data.

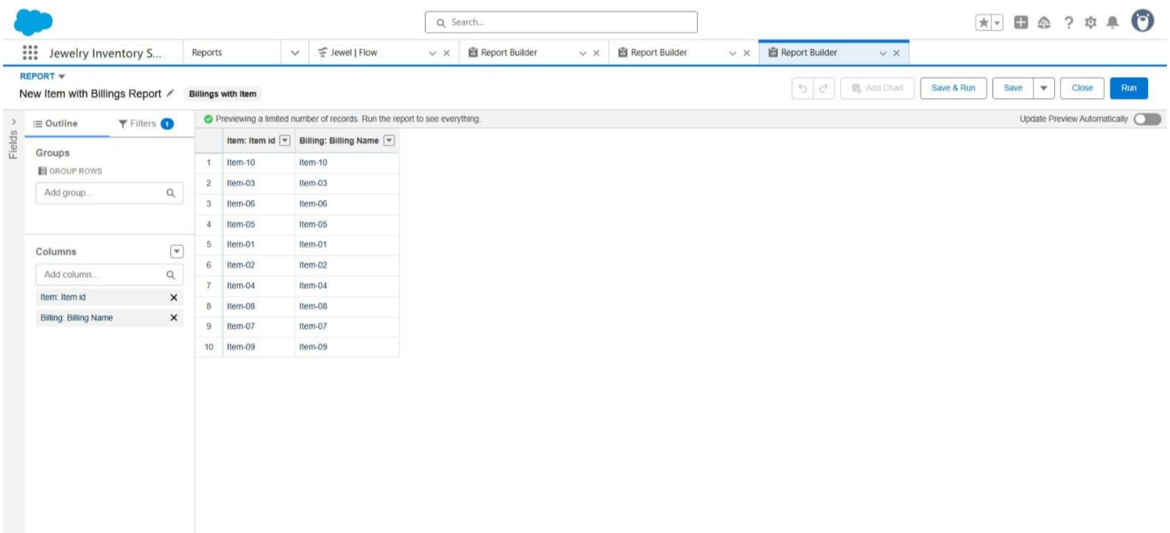
We created 3 Reports:

- Prices Report
- Item with Billings Report
- Billing with Items & Customer order

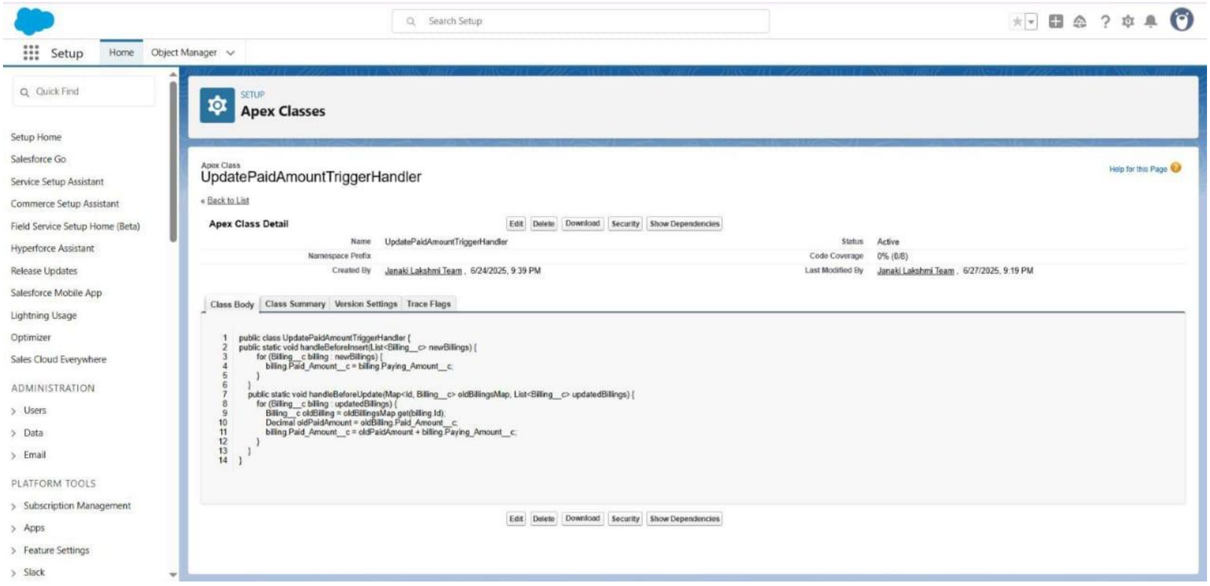


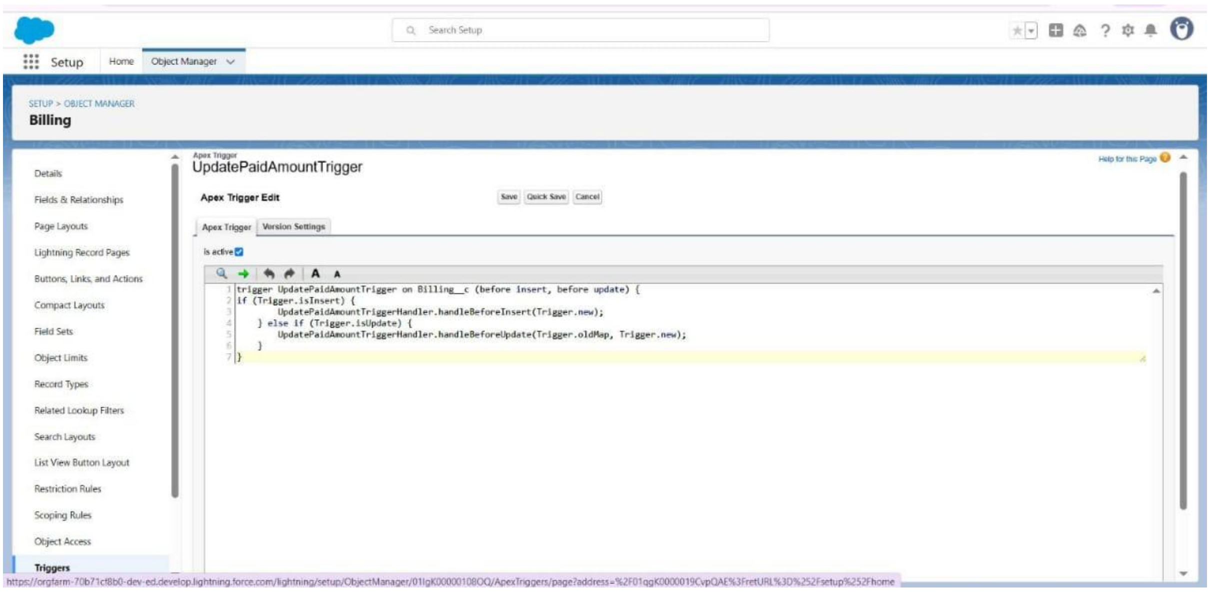

Search...
Jewelry Inventory S...
Billings
Jewel | Flow
Billings
Recently Viewed
New
Import
Change Owner
Assign Label
10 items • Updated a few seconds ago
Search this list...
Billing Name
1 Item-10
2 Item-09
3 Item-08
4 Item-07
5 Item-06
6 Item-05
7 Item-04
8 Item-03
9 Item-02
10 Item-01


Search...
Jewelry Inventory S...
Reports
Jewel | Flow
Report Builder
Report Builder
REPORT
New Prices Report
Prices
Add Chart
Save & Run
Save
Close
Run
Fields
Outline
Filters 1
Previewing a limited number of records. Run the report to see everything.
Update Preview Automatically
Groups
GROUP ROWS
Add group...
Columns
Add column...
Price: Price Name
Gold Price
Silver Price
Price: Price Name | Gold Price | Silver Price
1 Item-02 $30,000.00000 $10,000.00000
2 Item-01 $50,000.00000 $10,000.00000
3 Item-03 $80,000.00000 $40,000.00000
4 Item-04 $80,000.00000 $31,000.00000
5 Item-05 $50,000.00000 $10,000.00000
6 Item-06 $50,000.00000 $10,000.00000
7 Item-07 $50,000.00000 $40,000.00000
8 Item-08 $10,000.00000 $30,000.00000
9 Item-09 $1,000.00000 $30,000.00000
10 Item-10 $3,000.00000 $15,000.00000
11 $404,000.00000 $226,000.00000


Search...
Jewelry Inventory S...
Reports
Jewel | Flow
Report Builder
Report Builder
Report Builder
REPORT
New Item with Billings Report
Billings with Item
Add Chart
Save & Run
Save
Close
Run
Fields
Outline
Filters 1
Previewing a limited number of records. Run the report to see everything.
Update Preview Automatically
Groups
GROUP ROWS
Add group...
Columns
Add column...
Item: Item id
Billing: Billing Name
Item: Item id | Billing: Billing Name
1 Item-10 Item-10
2 Item-03 Item-03
3 Item-06 Item-06
4 Item-05 Item-05
5 Item-01 Item-01
6 Item-02 Item-02
7 Item-04 Item-04
8 Item-08 Item-08
9 Item-07 Item-07
10 Item-09 Item-09

Triggers:

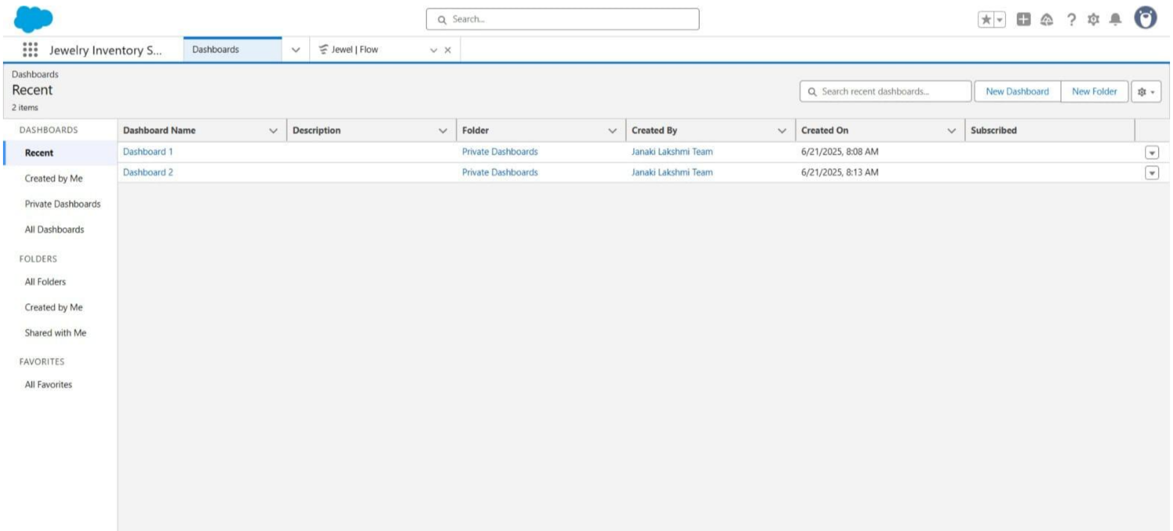

Setup
Home
Object Manager
SETUP
Apex Classes
Apex Class
UpdatePaidAmountTriggerHandler
Apex Class Detail
Name UpdatePaidAmountTriggerHandler
Status Active
Code Coverage 0% (0/8)
Created By Janaki Lakshmi Team , 6/24/2025, 9:39 PM
Last Modified By Janaki Lakshmi Team , 6/27/2025, 9:19 PM
Class Body
Class Summary
Version Settings
Trace Flags
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;
}
}
}

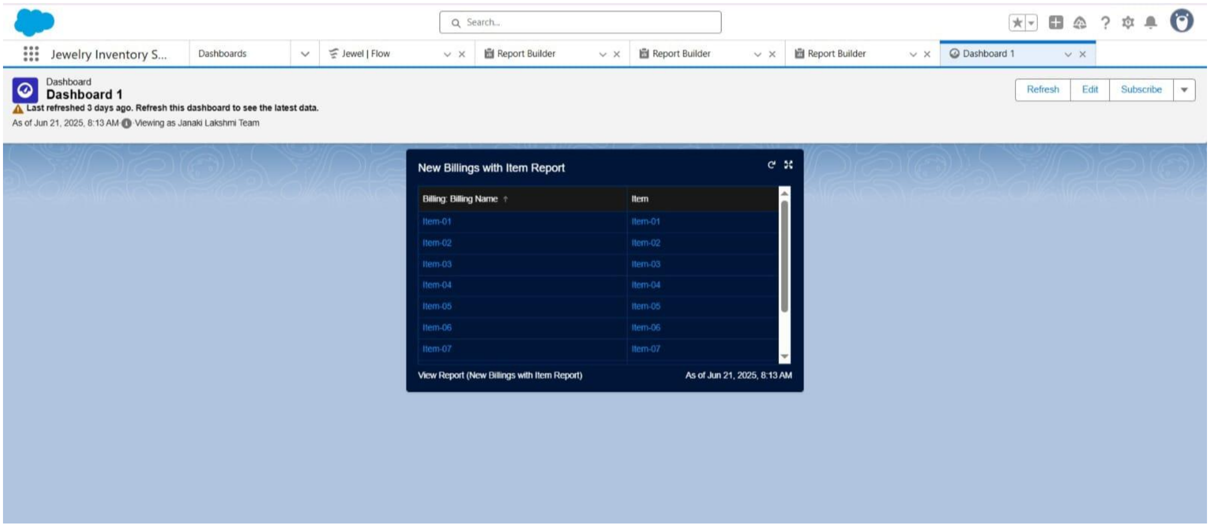

Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing
Apex Trigger
UpdatePaidAmountTrigger
Apex Trigger Edit
Save
Quick Save
Cancel
Apex Trigger
Version Settings
Is active
trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {
if (Trigger.isInsert) {
UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);
} else if (Trigger.isUpdate) {
UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap, Trigger.new);
}
}
Details
Fields & Relationships
Page Layouts
Triggers

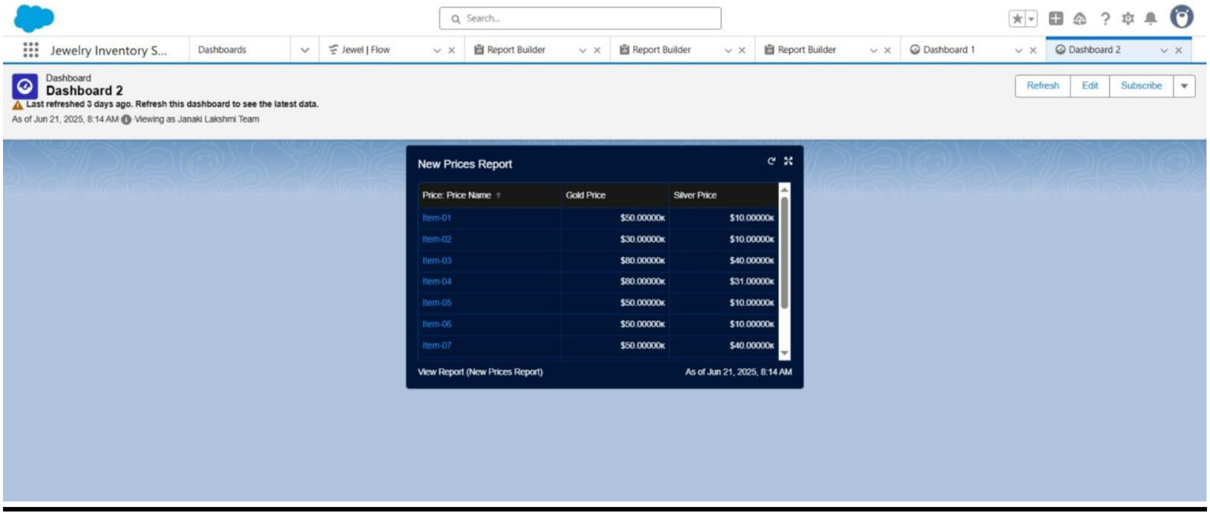
Dashboard:

In Salesforce, a dashboard is a powerful visualization tool that provides a real-time, interactive summary of key metrics and data trends from reports. It helps users and decision-makers quickly assess performance, monitor KPIs (Key Performance Indicators), and gain insights at a glance — all without needing to dig into raw data.

A dashboard is made up of components, such as charts, graphs, tables, gauges, and metrics, each based on an underlying report. For example, in a jewelry CRM, a dashboard might include components showing monthly sales by store, inventory levels of high-value items, top-selling gemstones, and open repair requests by status. You can group these visuals into sections to create a clear, informative layout tailored to different roles — such as store managers, sales reps, or executives.







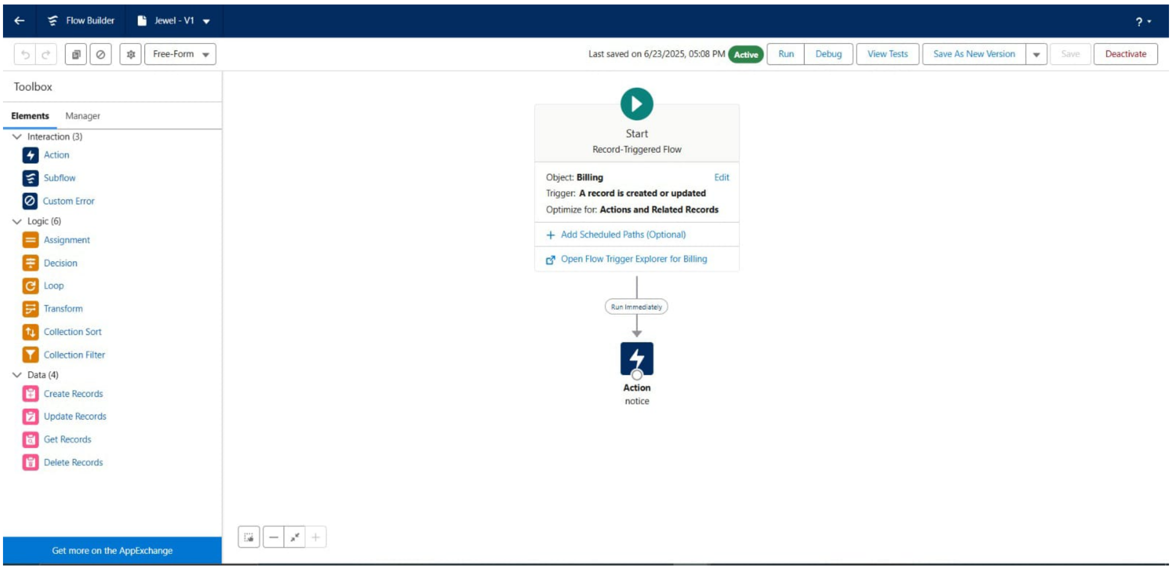
<u>Flows:</u>

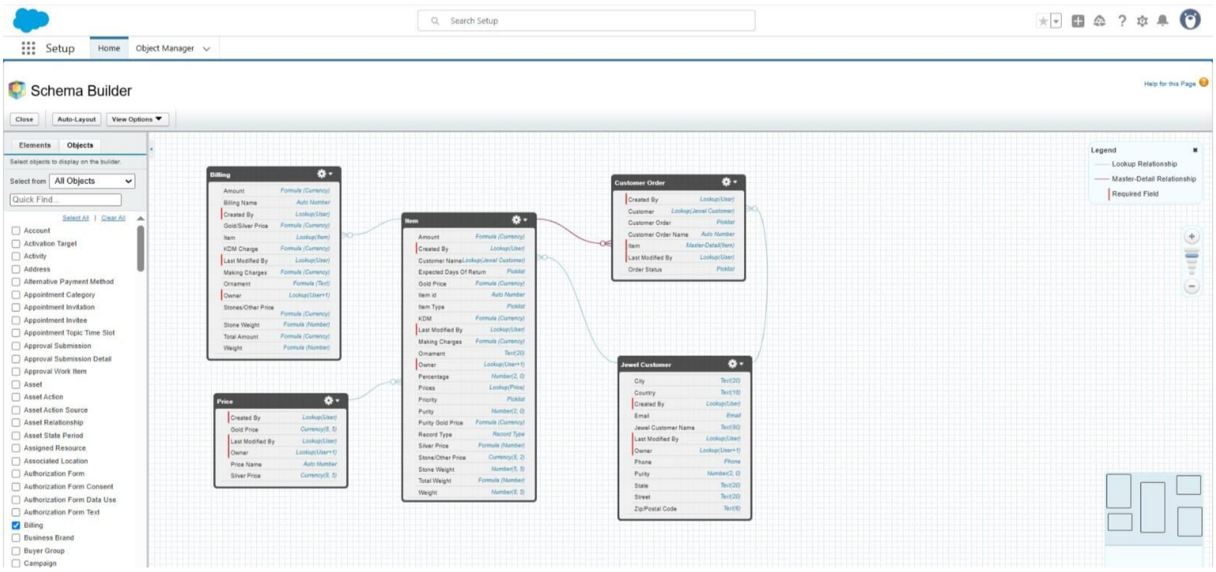
In Salesforce, Flows are powerful automation tools that allow you to create logic-based processes without writing code.

Using Flow Builder, admins and developers can design workflows that interact with data, guide users through screens, automate tasks, and handle complex business logic across objects.

There are several types of flows, each designed for specific use cases:

1. Screen Flows – Interactive flows that guide users through multi-step processes via screens (e.g., collecting information for a custom jewelry order).
2. Record-Triggered Flows – Automatically run when a record is created, updated, or deleted (e.g., send a confirmation email when a new repair request is logged).
3. Scheduled Flows – Run at a set time and frequency (e.g., weekly check on low stock items).
4. Autolaunched Flows – Can be called from Apex, buttons, or other flows; they run in the background without user interaction.
5. Platform Event-Triggered Flows – React to platform events for real-time integration scenarios.


Flow Builder
Jewel - V1
Free-Form
Last saved on 6/23/2025, 05:08 PM
Active
Run
Debug
View Tests
Save As New Version
Save
Deactivate
Toolbox
Elements
Manager
Interaction (3)
Action
Subflow
Custom Error
Logic (6)
Assignment
Decision
Loop
Transform
Collection Sort
Collection Filter
Data (4)
Create Records
Update Records
Get Records
Delete Records
Get more on the AppExchange
Start
Record-Triggered Flow
Object: Billing
Edit
Trigger: A record is created or updated
Optimize for: Actions and Related Records
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Billing
Run Immediately
Action
notice


Search Setup
Setup
Home
Object Manager
Schema Builder
Help for this Page
Close
Auto-Layout
View Options
Elements
Objects
Select from
All Objects
Quick Find...
Legend
Lookup Relationship
Master-Detail Relationship
Required Field
Billing
Item
Customer Order
Price
Jewel Customer

Conclusion :

In my point of view, the implementation of Salesforce is a complex process that requires careful planning, execution, and testing. Throughout this project, we have outlined the key steps involved in implementing Salesforce, including requirements gathering, solution design, testing and validation, and deployment. We have also identified key scenarios addressed by Salesforce in the implementation process, including sales, marketing, service, commerce, analytics, and integration scenarios.

By following the steps outlined in this project and addressing the key scenarios, organizations can ensure a successful Salesforce implementation that meets their business needs and drives user adoption