

# **Project Title: CRM**

## **JEWELLERY**

**College: -**

**Sri Shankarananda Giri Swamy Degree College**

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## **(1) Project Overview:**

A "CRM Jewellery Project" aims to develop a dedicated Customer Relationship Management (CRM) system specifically designed for a jewelry business, enabling them to effectively manage customer interactions, track purchase history, personalize marketing campaigns, and ultimately improve customer loyalty and sales by providing a centralized platform to access and analyze customer data across all touchpoints within the jewelry buying journey.

- 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 CRM is to gather consumer information and use it to enhance their experience. By connecting all channels onto a single platform, CRM helps companies personalize their products and services, including personalized marketing messages.

A CRM system helps businesses keep customer contact details up to date, track every customer interaction and manage customer accounts. It's also designed to help businesses improve customer relationships and Customer Lifetime Value (CLV)

## **(2) Objectives :**

### *Business Goals:*

The fundamental purpose of a CRM system is to improve the customer experience. Executing on this objective is the most sure-fire way to see positive results across your business. When you make improved customer satisfaction the main goal for your CRM, all other objectives work to support this goal.

The ultimate goal of customer relationship management and associated CRM systems is to efficiently manage and improve business relationships. There are stages in creating and leveraging customer relationships that break down the entire relationship life cycle into phases with distinct goals.

### **The 4 main objectives of a CRM**

- Centralizes information. One of the main objectives of a CRM is to centralize all customer-related information in a single, accessible system. ...
- Increases customer retention. ...
- Increases sales. ...
- Reduces costs.

### **Specific outcomes:**

When adapting a CRM project to the specific needs of a "CRM Jewel" project (assuming this refers to a business within the jewelry industry), there are unique considerations that will influence the specific outcomes and key deliveries.

## **(3) Salesforce Key Features and Concepts Utilized:**

Key features of Salesforce CRM include: contact management, lead management, opportunity management, sales forecasting, reporting and dashboards, automation through workflows, collaboration tools, cloud-based access, mobile accessibility, AI integration, campaign management, and a single source of truth for customer data, allowing businesses to track and manage customer interactions across all channels effectively; with core concepts like lead qualification, opportunity stages, and customer lifecycle management central to the platform.

♥ We used the following **Objects**:

- ❖ Jewel Customer
- ❖ Items
- ❖ Billing
- ❖ Prices
- ❖ Customer order

♥ We used **Tabs** such as

- Jewel Customer Tab
- Item Tab ..Etc

♥ We Created a Lightning App : **Jewellery Inventory System**

♥ We Created Fields such as :-

- ❖ **Lookup Relationship**
- ❖ **Master-Detailed Relationship**
- ❖ **Text,Phone,Email Fields in Jewel Customer Object**
- ❖ **Number Picklist Fields in Item Object**
- ❖ **Currency Fields in Price Object**
- ❖ **Formula Field (cross object)in Item Object**
- ❖ **Also Created some other Fields.**

♥ **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

↔ We Entered Objects as :-

- Jewel Customer
- Items
- Customer Order
- Prices
- Billing in schema Builders

♥ **Field Dependencies:-**

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.

We created New Field Dependencies , Controlling as "Priority" & Depending Field as "Expecting Days of Return".

♥ **Validation Rules :**

Created the validation rule for Postal Code field in Jewel Customer object.

♥ **Profiles :**

We Created 2 Profiles :

- ✓ Gold Smith Profile
- ✓ Worker Profiile

## ♥ **Roles :**

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organisation can have to data.

Added Goldsmith role in CEO Role & Added Worker Role which reports to Goldsmith .

## ♥ **Users:**

Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

- ★ Niklaus Mikaelson in Goldsmith Profile
- ★ Kol Mikaelson in Worker Profile
- ★ 2 more Users in Worker Profile

## ♥ **Page Layouts:**

Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

Created 2 Page layouts in Item object named as:-

- ❖ “Page Layout for Gold ”
- ❖ “Page layout for Silver”

## ♥ **Record Type:**

Record types allow administrators to create a different page layout with custom picklist fields and values for the same business process and various business processes.

Created Record Types in Item Object labeled as Gold & Silver.

♥ **Permission sets:**

A standard permission set consists of a group of common permissions for a particular feature associated with a permission set license.

We Created New Permission Sets & Labeled it as “**Per to Worker**” And in Item Object we enabled Gold & Silver object permission we selected “Read ,Edit & Create “. We added Assignments which we used under Worker Profile users.

♥ **User Adoption:**

*In Jewelry Inventory System we created Jewel Customers under Jewel Customer Tab.*

*We created some Records under “ Item, Prices, Customer orders & Billing”.*

♥ **Reports:**

By using Reports, we can examine our 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.

We created 3 reports:

- Prices Report
- Billings with item and Customer order Report.

- Item with Billings Report

**♥ *Dashboards:***

We created dashboards under “Item with Billings Report”, “Billings with item and Customer order Report”, “Prices Report”.

**♥ *Flows:***

Flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens

**We selected Record Triggered flow and “*Selected the Object as a “Billing” in the Drop-down list. Selected the Trigger Flow where as “A record is Created or Updated”. Selected the Optimize the flow for: “Actions and Related Records”***

## **(4) Detailed steps to Solution Design:**

We created objects:

- ◆ Jewel customer
- ◆ Item
- ◆ Billings
- ◆ Prices
- ◆ Customer Order

The screenshot shows the Salesforce Object Manager interface for the 'Item' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and displays 23 items, sorted by Field Label. The table includes columns for Field Name, Type, Description, and Validation Rules. Key fields shown include Owner (Lookup(User,Group)), Percentage (Number(2, 0)), Prices (Lookup(Price)), Priority (Picklist), Purity (Number(2, 0)), Purity Gold Price (Formula (Currency)), and Record Type (Record Type). The top right of the table has buttons for Quick Find, New, Deleted Fields, Field Dependencies, and Set History Tracking.

Field Label	Type	Description	Validation Rules
Owner	Lookup(User,Group)		✓
Percentage	Number(2, 0)		
Prices	Lookup(Price)		✓
Priority	Picklist		
Purity	Number(2, 0)		
Purity Gold Price	Formula (Currency)		
Record Type	Record Type		✓

Salesforce A... APSCHE Document 1 SmartInternz Smartinternz Jewelcrm Da... Jewel Cust... Google Pass

ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Qy000003YcFe/FieldsAndRelationships/view

Cloud Setup Home Object Manager Search Setup

SETUP > OBJECT MANAGER Jewel Customer

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

Fields & Relationships 11 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Country	Country__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Customer name	Name	Text(80)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Phone	Phone__c	Phone		
State	State__c	Text(20)		
Street	Street__c	Text(20)		
Zip/Postal code	Zip_Postal_code__c	Text(6)		

26°C Haze

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Salesforce A... APSCHE Document 1 SmartInternz Smartinternz Jewelcrm Da... Billing | Sales Google Pass

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Cloud Setup Home Object Manager Search Setup

SETUP > OBJECT MANAGER Billing

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

Fields & Relationships 14 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula(Currency)		
Billing Name	Name	Auto Number		
Created By	CreatedById	Lookup(User)		
Gold/Silver Price	Gold_Silver_Price__c	Formula(Currency)		
Item	Item__c	Lookup(Item)		
KDM Charge	KDM_Charge__c	Formula(Currency)		
Last Modified By	LastModifiedById	Lookup(User)		
Making Charges	Making_Charges__c	Formula(Currency)		
Ornament	Ornament__c	Formula(Text)		
Owner	OwnerId	Lookup(User,Group)		

https://ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/01Qy000003YhGv/FieldsAndRelationships/view

Top Stories Earthquake with... Search ENG IN 10:48 28-02-2025

## We used 2 Profiles :

\* Gold Smith Profile

\* Worker Profile

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. On the left, there's a search bar and a sidebar with 'Users' and 'Profiles' sections. The main area is titled 'Profile Edit Worker'. It shows the profile details: Name (Worker), User License (Salesforce Platform), and Description (empty). Under 'Custom App Settings', the 'Platform (standard\_\_Platform)' app is set to 'Visible' and 'Default'. Other apps like 'Analytics Studio (standard\_\_Insights)', 'App Launcher (standard\_\_AppLauncher)', and 'Jewellery Inventory System (Jewellery\_Inventory\_System)' are listed but not selected. The status bar at the bottom shows it's 30°C and sunny.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. On the left, there's a search bar and a sidebar with 'Users' and 'Profiles' sections. The main area is titled 'Profile Edit Gold Smith'. It shows the profile details: Name (Gold Smith), User License (Salesforce), and Description (empty). Under 'Custom App Settings', multiple apps are selected as 'Visible' and 'Default': 'All Tabs (standard\_\_AllTabSet)', 'Analytics Studio (standard\_\_Insights)', 'App Launcher (standard\_\_AppLauncher)', 'Approvals (standard\_\_Approvals)', 'My Service Journey (standard\_\_MSJApp)', 'Queue Management (standard\_\_QueueManagement)', 'Sales (standard\_\_LightningSales)', and 'Sales (standard\_\_Sales)'. The status bar at the bottom shows it's 30°C and sunny.

## **Lightening App:**

The screenshot shows a browser window with multiple tabs open, including Salesforce, APSCHE, Document 1, SmartInternz, Smartinternz, Recently Viewed, Billing | Sale, Google Pass, and others. The main content area displays a 'Jewellery Inventory ...' page with a 'Recently Viewed' section. The section title is 'Jewel Customers Recently Viewed'. It shows a list of 2 items, both updated a few seconds ago, with the first item being 'Maha' and the second being 'Gowri'. The interface includes a search bar, a toolbar with buttons for New, Import, Change Owner, and Assign Label, and a footer with system status icons.

Jewel Customers  
Recently Viewed

2 items • Updated a few seconds ago

	Customer name
1	<input type="checkbox"/> Maha
2	<input type="checkbox"/> Gowri

New Import Change Owner Assign Label

Search this list...

26°C Haze

Search

ENG IN 10:55 28-02-2025

## Roles:

The screenshot shows the Salesforce Setup Roles page for the 'Gold Smith' role. The left sidebar shows the navigation menu under 'Users' with 'Roles' selected. The main content area displays the 'Role Detail' for 'Gold Smith'. The details include:

Label	Value	Role Name	Value
This role reports to	Installation & Repair Services	Role Name as displayed on reports	Gold_Smith
Modified By	Mahaboob bee Team, 21/02/2025, 6:32 pm	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		

Below the role detail, there is a table titled 'Users in Gold Smith Role' showing one user assigned to the role:

Action	Full Name	Alias	Username	Active
Edit	Niklaus Mikaelson	nmika	niku@apsche.com	✓

The screenshot shows the Salesforce Setup Roles page with a hierarchical list of roles. The left sidebar shows the navigation menu under 'Users' with 'Roles' selected. The main content area displays a tree view of roles:

- COO (Edit | Del | Assign)
  - Add Role
- SVP, Customer Service & Support (Edit | Del | Assign)
  - Add Role
  - Customer Support, International (Edit | Del | Assign)
    - Add Role
  - Customer Support, North America (Edit | Del | Assign)
    - Add Role
  - Installation & Repair Services (Edit | Del | Assign)
    - Add Role
    - Gold Smith (Edit | Del | Assign)
      - Add Role
      - Worker (Edit | Del | Assign)
        - Add Role
  - SVP, Human Resources (Edit | Del | Assign)
    - Add Role
  - SVP, Sales & Marketing (Edit | Del | Assign)
    - Add Role
  - VP, International Sales (Edit | Del | Assign)
    - Add Role
  - VP, Marketing (Edit | Del | Assign)
    - Add Role

At the bottom of the page, there is a note: 'Didn't find what you're looking for? Try using Global Search.'

# Users:

- *Niklaus Mikaelson*
- *Kol Mikaelson*

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected in the sidebar. The main page displays the 'User Edit' screen for a user named 'Niklaus Mikaelson'. The 'General Information' section contains the following details:

Field	Value
First Name	Niklaus
Last Name	Mikaelson
Alias	mnika
Email	gundagowripriya@gmail.com
Username	niku@apsche.com
Nickname	Niku
Title	
Company	
Department	
Division	

On the right side, there are sections for 'Role' (set to 'Gold Smith'), 'User License' (set to 'Salesforce'), and various checkboxes for other user types like Marketing User, Offline User, etc. Most checkboxes are unchecked except for 'Active' which is checked.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected in the sidebar. The main page displays the 'User Detail' screen for a user named 'Kol Mikaelson'. The 'User Detail' table shows the following information:

Name	Kol Mikaelson	Role	Worker
Alias	mika	User License	Salesforce Platform
Email	gundagowripriya@gmail.com [Verify]	Profile	Worker
Username	niku@apsche.com	Active	<input checked="" type="checkbox"/>
Nickname	miku	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+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>

Below the table, there are links for 'Permission Set Assignments', 'Public Group Membership', 'Queue Membership', 'Team', 'Managers in the Role Hierarchy', 'OAuth Apps', 'Third-Party Account Links', 'Installed Mobile Apps', 'Authentication Settings for External Systems', 'Login History', and 'User Provisioning Accounts'.

## We Created 2 Page layouts: Page Layout for Gold & Silver

The screenshot shows the Salesforce Setup interface for creating a page layout. The left sidebar is titled "Item" and includes sections for Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main area is titled "Page Layout for Silver" and contains a "Fields" section with a table and a "Layout Properties" tab. The table has columns for Field Name, Type, and Description. The "Layout Properties" tab shows the layout configuration.

The screenshot shows the Salesforce Setup interface for creating a page layout. The left sidebar is titled "Item" and includes sections for Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main area is titled "Page Layout for Gold" and contains a "Fields" section with a table and a "Layout Properties" tab. The table has columns for Field Name, Type, and Description. The "Layout Properties" tab shows the layout configuration. A "Information" section is visible at the bottom, listing various record details.

We created 3 Reports:

- ◆ **Prices Report**
- ◆ **Item with Billings Report**.
- ◆ **Billing with Items & Customer order**

The screenshot shows the Salesforce Lightning interface for report configuration. The title bar indicates the URL is [ssgsdegreecollege39-dev-ed.lightning.force.com/lightning/r/Report/00OdM00000AR3iPUAT/edit?queryScope=userFolders](https://ssgsdegreecollege39-dev-ed.lightning.force.com/lightning/r/Report/00OdM00000AR3iPUAT/edit?queryScope=userFolders). The main area is titled "REPORT" and shows the "Prices Report". The configuration pane on the left includes sections for "Fields", "Groups", and "Columns". The "Fields" section has "Outline" selected. The "Groups" section contains "GROUP ROWS" and "Add group...". The "Columns" section lists "Price", "Gold Price", and "Silver Price". The preview pane on the right shows a table with three rows of data:

	Price: Price	Gold Price	Silver Price
1	Price-03	₹123.45000	₹123.45000
2	Price-04	-	₹123.45000
3		₹123.45000	₹246.90000

The screenshot shows the Salesforce Lightning interface for report configuration. The title bar indicates the URL is [ssgsdegreecollege-cd-dev-ed.lightning.force.com/lightning/r/Report/00OQy00000CZGURMA5/view?queryScope=userFolders](https://ssgsdegreecollege-cd-dev-ed.lightning.force.com/lightning/r/Report/00OQy00000CZGURMA5/view?queryScope=userFolders). The main area is titled "Report: Billings with item Billings with Item Report". The configuration pane on the left shows a summary table with the following data:

Total Records	Total Amount	Total Total Amount	Total KDM Charge	Total Making Charges	Total Stones/Other Price	Total Stone Weight
3	₹7,25,600.00	₹9,12,160	₹1,12,560	₹34,000.00	₹40,000.00	40.00

The detailed table below lists items by Billing Name, Item ID, Amount, Ornament, Total Amount, KDM Charge, Making Charges, Stones/Other Price, and Stone Weight.

Item: Item Type	Billing: Billing Name	Item: Item Id	Amount	Ornament	Total Amount	KDM Charge	Making Charges	Stones/Other Price	Stone Weight
Gold (2)	Billing-01	Item-01	₹3,20,000.00	Necklace	₹3,77,000	₹22,000	₹15,000.00	₹10,000.00	10.00
	Billing-02	Item-02	₹4,00,000.00	Necklace	₹5,18,000	₹80,000	₹18,000.00	₹20,000.00	10.00
			₹7,20,000.00		₹8,95,000	₹1,12,000	₹33,000.00	₹30,000.00	20.00
Silver (1)	Billing-05	Item-03	₹5,600.00	Necklace	₹17,160	₹560	₹1,000.00	₹10,000.00	20.00
			₹5,600.00		₹17,160	₹560	₹1,000.00	₹10,000.00	20.00
<b>Total (3)</b>			<b>₹7,25,600.00</b>		<b>₹9,12,160</b>	<b>₹1,12,560</b>	<b>₹34,000.00</b>	<b>₹40,000.00</b>	<b>40.00</b>

The screenshot shows a Salesforce Lightning interface with a report titled "Billings with item and Customer order". The report displays 3 total records, all labeled "Billing-01", "Billing-02", and "Billing-05". The interface includes a top navigation bar with various tabs like "Salesforce Admin", "APSCHE LongTe...", "SmartInternz C...", "Smartinternz", "Billings with item", "Billing | Salesfor...", and "Document 1.doc". Below the navigation is a toolbar with search, filter, and charting options. The bottom of the screen shows a Windows taskbar with icons for weather (26°C Haze), search, and other applications.

## Dashboards:

The screenshot shows a Salesforce Lightning interface for dashboards. It lists recent dashboards such as "Jewelcrm Dashboard" and "Maha Team Dashboard". A sidebar on the left provides links to "Dashboards", "Recent", "Created by Me", "Private Dashboards", "All Dashboards", "Folders", "All Folders", "Created by Me", "Shared with Me", and "Favorites". The bottom of the screen shows a Windows taskbar with icons for weather (26°C Haze), search, and other applications.

Salesforce Admin | APSCHE L... | SmartInternz C... | Smartinternz | Jewelcrm Dashb... | Billing | Salesfor... | Document 1.docx | +

ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01ZQy000002pZU1MAM/view?queryScope=userFolders

Jewellery Inventory ... Dashboards Maha | ... Price -0... Item-01... Custom... Billing... Item-02... Gowri | ... Jewelcr... More

Dashboard **JewelCRM Dashboard**  
Last updated 4 days ago. Click here to refresh this dashboard to see the latest data.  
As of 28-Feb-2025, 0:59 pm Viewing as Maha Team SSGS

**Billings with Item Report**

Sum of Amount: ₹720k

Item: Item Type  
Gold Other

₹720K

[View Report \(Billings with Item Report\)](#)

**Prices Report**

Price: Price Name	Gold Price	Silver Price
Price -01	₹80.0000k	₹70.0000k
Price -02	₹60.0000k	₹50.0000k

[View Report \(Prices Report\)](#)

26°C Haze ENG IN 11:15 28-02-2025

Salesforce Admin | APSCHE L... | SmartInternz C... | Smartinternz | Maha Team Dashb... | Jewelcrm Dashb... | Billing | Salesfor... | Document 1.docx | +

ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01ZQy000002rK97MAE/view?queryScope=userFolders

Jewellery Inventory ... Dashboards Maha | ... Price -0... Item-01... Custom... Billing... Item-02... Gowri | ... Maha T... More

Dashboard **Maha Team Dashboard**  
As of 28-Feb-2025, 10:31 am Viewing as Maha Team SSGS

**Billings with item and Customer order**

Billing: Billing Name ↑

Billing-01  
Billing-02  
Billing-03  
Billing-04  
Billing-05

[View Report \(Billings with item and Customer order\)](#)

26°C Haze ENG IN 11:16 28-02-2025

## Validation Rules:

### Created Validation Rules under Jewel Customer & Items

The screenshot shows the 'Item Validation Rule' detail page in the Salesforce Object Manager. The page title is 'Item Validation Rule'. On the left, there is a sidebar with links: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area displays the validation rule details:

Field	Value
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 ) )
Error Message	'Please fill Required fields'
Description	
Created By	Maha Team SSGS, 26/02/2025, 2:28 pm
Modified By	Maha Team SSGS, 28/02/2025, 12:51 pm

The screenshot shows the 'Jewel Customer Validation Rule' detail page in the Salesforce Object Manager. The page title is 'Jewel Customer Validation Rule'. On the left, there is a sidebar with links: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area displays the validation rule details:

Field	Value
Rule Name	Postal_Code
Active	✓
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 ) ) )
Error Message	'Must contain 6 digits'
Description	
Created By	Maha Team SSGS, 26/02/2025, 2:24 pm
Modified By	Maha Team SSGS, 03/03/2025, 11:49 am

Salesforce Ac X | APSCHE X | SmartInternz X | Smartinternz X | Maha Team X | Jewel Custom X | Document 1 X | (37) Salesfor X | +

ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQty000003YcFe/ValidationRules/view

Cloud icon | Search Setup | Home | Object Manager

SETUP > OBJECT MANAGER  
**Jewel Customer**

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

**Validation Rules**  
2 items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Postal_Code	Zip/Postal code	"Must contain 6 digits"	✓	Maha Team SSGS, 26/02/2025, 2:24 pm
ValidationRule_For_JewelCustomerObject	Top of Page	"Please fill Required fields".	✓	Maha Team SSGS, 26/02/2025, 2:26 pm

28°C Mostly sunny | Search | Taskbar icons | ENG IN | 11:28 28-02-2025

W Mahateam Documentation X | Mahateam Documentation X | Mahateam Documentation X | Document 1 (2).pdf | Item | Salesforce X | +

ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQty000003YfDV/ValidationRules/view

Cloud icon | Search 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

**Validation Rules**  
1 items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
ValidationRule_For_Item	Top of Page	"Please fill Required fields"	✓	Maha Team SSGS, 28/02/2025, 12:51 pm

38°C Mostly sunny | Search | Taskbar icons | ENG US | 16:42 03-03-2025

Snipping Tool | Screenshot copied to clipboard | Automatically saved to screenshots folder | Markup and share

Salesforce App | APSCHE | SmartInternz | Smartinternz | Maha Team | Jewel Custom | Document 1 | (37) Salesfor | +

ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQty000003YcFe/ValidationRules/03dQy000007VbblIAK/view

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Jewel Customer

**Jewel Customer Validation Rule**

Back to Jewel Customer

**Validation Rule Detail**

Rule Name	ValidationRule_For_JewelCustomerObject	Active	✓
Error Condition Formula	OR(ISBLANK(City__c), ISBLANK(Country__c), ISBLANK(Phone__c), ISBLANK(State__c), ISBLANK(Street__c))	Error Location	Top of Page
Error Message	"Please fill Required fields".		
Description			
Created By	Maha Team SSGS, 26/02/2025, 2:26 pm	Modified By	Maha Team SSGS, 26/02/2025, 2:26 pm

Help for this Page

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

28°C Mostly sunny 11:29 28-02-2025

Salesforce App | APSCHE | SmartInternz | Smartinternz | Maha Team | Item | Salesfor | Document 1 | (37) Salesfor | +

ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQty000003YfDV/ValidationRules/03dQy000007VbTtIAK/view

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Item

**Item Validation Rule**

Back to Item

**Validation Rule Detail**

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_Offer_Price__c), ISBLANK(Stone_Weight__c), ISBLANK(Weight__c))	Error Location	Top of Page
Error Message	"Please fill Required fields".		
Description			
Created By	Maha Team SSGS, 26/02/2025, 2:28 pm	Modified By	Maha Team SSGS, 26/02/2025, 2:28 pm

Help for this Page

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

28°C Mostly sunny 11:30 28-02-2025

**Jewel Customer Validation Rule**

Rule Name: Postal\_Code

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))
)
```

Error Message: "Must contain 6 digits"

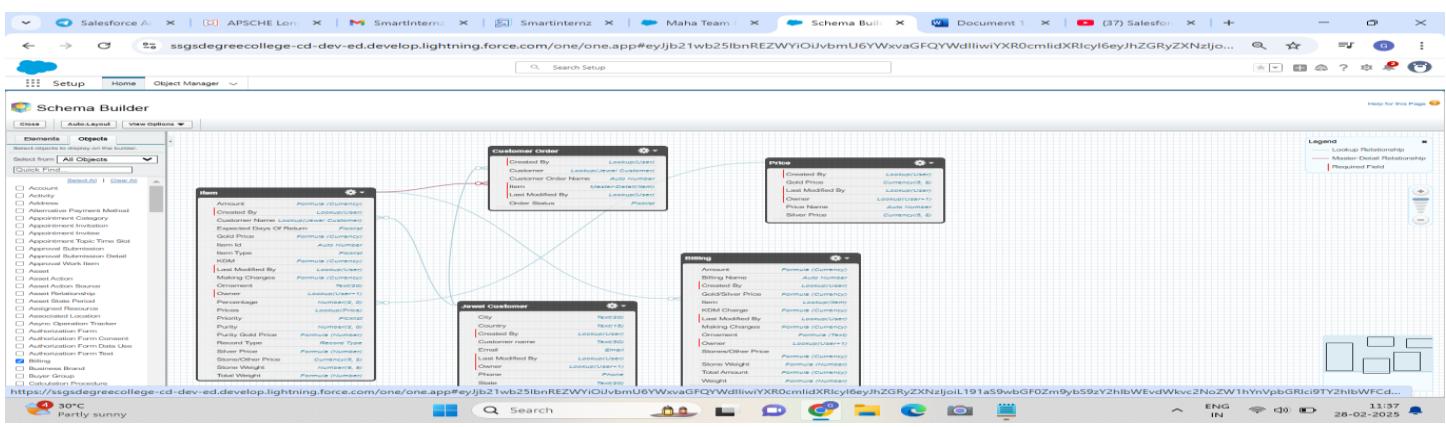
Description:

Created By: Maha Team SSGS, 28/02/2025, 2:24 pm

Modified By: Maha Team SSGS, 28/02/2025, 2:24 pm

## Schema Builder:

We created Schema Builders for Jewel Customer, Price, Item, Customer order & Billing.



## Field Dependencies:

# We created Field Dependencies under Item objects

The screenshot shows the Salesforce Setup interface with the URL [ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/setup/null/page?address=%2Fp%2Fdependency%2FEditDependencyUI%2Fe%3FtableEnumO...](https://ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/setup/null/page?address=%2Fp%2Fdependency%2FEditDependencyUI%2Fe%3FtableEnumO...). The page title is "Edit Field Dependency". It displays a grid for defining dependencies between fields. The columns are "Controlling Field" (Priority), "Dependent Field" (Expected Days Of Return), and "Value". The "Priority" column has rows: "Low", "1-3 Days", "4-5 Days", "4-5 Days", and "8-10 Days". The "Expected Days Of Return" column has rows: "8-10 Days", "1-3 Days", "4-5 Days", and "8-10 Days". A legend indicates that yellow cells represent "Included Value" and green cells represent "Excluded Value". The status bar at the bottom shows "30°C Partly sunny" and the date "28-02-2025".

Setup Home  
Service Setup Assistant  
Commerce Setup Assistant  
Field Service Setup Home (Beta)  
Hyperforce Assistant  
Release Updates  
Lightning Experience Transition Assistant  
Salesforce Mobile App  
Lightning Usage Optimizer  
Sales Cloud Everywhere  
ADMINISTRATION  
> Users  
> Data  
> Email  
PLATFORM TOOLS  
> Subscription Management  
> Apps  
> Feature Settings

Help for this Page

30°C Partly sunny

https://ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/setup/null/page?address=%2Fp%2Fdependency%2FEditDependencyUI%2Fe%3FtableEnumO... 28-02-2025

Setup Home Object Manager

Search Setup

Help for this Page

30°C Partly sunny

https://ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQty000003YfDV/FieldsAndRelationships/viewDependencyList 28-02-2025

Setup Home Object Manager

Search Setup

Help for this Page

30°C Partly sunny

https://ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQty000003YfDV/FieldsAndRelationships/viewDependencyList 28-02-2025

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

Item Field Dependencies

Back to Custom Object: Item

This page allows you to define dependencies between fields (e.g., dependent picklists).

Action	Controlling Field	Dependent Field	Modified By
Edit   Del	Priority	Expected Days Of Return	Maha Team SSSG, 28/02/2025, 4:36 pm

ENG IN 11:46 28-02-2025

## Tabs:

We created **Tabs** for **Jewel Customer, Prices, Items, Billing & Customer Order.**

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

- Header:** Document 1.docx, Smartinternz, Maha Team Dashboard | Salesforce, Tabs | Salesforce.
- Breadcrumbs:** ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home
- Search Bar:** Search Setup
- Left Navigation:** Setup, Home, Object Manager, User Interface (expanded), Rename Tabs and Labels, **Tabs**.
- Middle Content:**
  - Custom Tabs:** You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
  - Custom Object Tabs:** A table showing five custom tabs:

Action	Label	Tab Style	Description
Edit   Del	Billing	Balls	
Edit   Del	Customer Orders	Alarm clock	
Edit   Del	Items	Airplane	
Edit   Del	Jewel Customers	Apple	
Edit   Del	Prices	Heart	
  - Web Tabs:** No Web Tabs have been defined.
  - Visualforce Tabs:** No Visualforce Tabs have been defined.
- Bottom:** Weather (31°C, Partly sunny), Search bar, and various system icons.

# Flows: We created flows

Flow  
**Email Notification Flow**

Type  
Record—Run After Save

Associated Record  
Jewellery Inventory ...

Progress Status  
**Activated**

Last Modified Date  
26/02/2025, 9:53 pm

Flow Owner  
Maha Team SSGS

Related Details

Information

Flow Label	API Name
Email Notification Flow	Email_Notification_Flow
Description	Flow Type
	Record-Triggered After Save Flow
Associated Record	Created Date
	26/02/2025, 9:53 pm
Created By	Last Modified Date
Maha Team SSGS, 26/02/2025, 9:53 pm	26/02/2025, 9:53 pm
Last Modified	Subcategory
Maha Team SSGS, 26/02/2025, 9:53 pm	
Category	

https://ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/r/FlowRecord/2aFQy000006PqWDMA0/view

29°C Partly sunny Search ENG IN 11:52 28-02-2025

Flows  
**Recently Viewed**

1 item • Updated a few seconds ago

Flow Label	Flow Type	Progress Status	Associated Record	Description	Last Modified Date	Last Modified
Email Notification Flow	Record-Triggered After Save Flow	<b>Activated</b>			26/02/2025, 9:53 pm	MSSGS

Search this list...

29°C Partly sunny Search ENG IN 11:52 28-02-2025

## (5) Testing & Validation:

### User Interface Testing:

#### ♥ Record Types:-

We Created Record types in item object and labeled as “Gold” and “Silver”.

The screenshot shows the Salesforce Object Manager interface for the 'Item' object. The left sidebar has 'Record Types' selected. The main area displays two record types: 'Gold' and 'Silver'. The 'Gold' record type has a description of "'Gold items information'" and was created by 'Maha Team SSGS' on 26/02/2025, 6:09 pm. The 'Silver' record type has a description of 'Record for Silver' and was created by 'Maha Team SSGS' on 26/02/2025, 6:11 pm. The interface includes standard Salesforce navigation and search tools at the top.

The screenshot shows the details page for the 'Gold' record type under the 'Item' object. The left sidebar has 'Record Types' selected. The main area shows the record type properties: Record Type Label (Gold), Record Type Name (Gold), Namespace Prefix (None), Description ('Gold items information'), and Created By (Maha Team SSGS, 26/02/2025, 6:09 pm). It also shows the 'Active' status checked. 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. The interface includes standard Salesforce navigation and search tools at the top.

Record Type  
**Silver**  
+ Back to Custom Object: 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

Record Type Label: Silver  
Record Type Name: Silver  
Namespace Prefix:  
Description: Record for Silver  
Created By: Maha Team SSGS, 28/02/2025, 6:11 pm  
Modified By: Maha Team SSGS, 28/02/2025, 6:11 pm  
Status: Active

Picklists Available for Editing

Action	Field	Modified Date
Edit	Expected Days Of Return	28/02/2025, 6:11 pm
Edit	Item Type	28/02/2025, 6:11 pm
Edit	Priority	28/02/2025, 6:11 pm

## ❖ Permission Sets:-

We created permission sets and labeled as “Per to Worker” and selected object permissions for “Read ,Edit, Create”.

Document 1.doc Maha Team Dasi Permission Sets Email Notification Email Notification Smartinternz Smartinternz +

31°C Partly sunny Search ENG IN 18:09 28-02-2025

Setup Home Object Manager

Q permis

Users  
Permission Set Groups  
**Permission Sets**  
Custom Code  
Custom Permissions

Didn't find what you're looking for?  
Try using Global Search.

Permission Sets

Video Tutorial | Help for this Page

Find Settings... Clone Edit Properties Manage Assignments View Summary

**Permission Set Overview**

Description	permission for worker	API Name	Per_to_Worker
License		Namespace Prefix	
Session Activation Required	<input type="checkbox"/>	Created By	Maha Team SSGS, 28/02/2025, 8:57 pm
Permission Set Groups Added To	0	Last Modified By	Maha Team SSGS, 28/02/2025, 8:58 pm

**Apps**

- Assigned Apps**  
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu
- Object Settings**  
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**  
Permissions to execute Apex classes
- Visualforce Page Access**  
Permissions to execute Visualforce pages

6 33°C Mostly sunny Search ENG IN 18:29 28-02-2025

The screenshot shows the Salesforce Setup interface under the 'Permission Sets' tab. A search bar at the top has 'permis' typed into it. The left sidebar shows navigation options like 'Users', 'Permission Set Groups', and 'Custom Code'. The main content area is titled 'Permission Sets' and displays the 'Per to Worker' permission set. It includes sections for 'Tab Settings' (Available, Visible), 'Item: Record Type Assignments' (Gold, Silver record types assigned to Gold), and 'Object Permissions' (Read, Create, Edit, Delete permissions). Buttons for 'Save', 'Clone', 'Edit Properties', 'Manage Assignments', and 'View Summary' are visible.

## ♥ Profiles: -

We created 2 Profiles and given name as

- ❖ Gold Smith Profile
- ❖ Worker Profile

The screenshot shows the Salesforce Setup interface under the 'Profiles' tab. A search bar at the top has 'profil' typed into it. The left sidebar shows navigation options like 'Users' and 'Profiles'. The main content area is titled 'Profiles' and displays the 'Gold Smith' profile. It includes fields for 'Name' (Gold Smith), 'User License' (Salesforce), and 'Description'. The 'Custom App Settings' section lists various app settings with checkboxes for 'Visible' and 'Default'. Buttons for 'Save', 'Save & New', and 'Cancel' are visible.

Document 1.docx Maha Team Dashboard | Sales Profiles | Salesforce Smartinternz Smartinternz

ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eQy00000C9R0T%2Fe%3FretURL%3D%252F00...

Cloud Setup Home Object Manager

Search Setup

profil

Users Profiles

Didn't find what you're looking for? Try using Global Search.

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	
Read	<input checked="" type="checkbox"/>					
View All Records	<input checked="" type="checkbox"/>					
Modify All Records	<input checked="" type="checkbox"/>					
View All Fields	<input checked="" type="checkbox"/>					
Individuals	<input checked="" type="checkbox"/>					
Inventory Reservations	<input checked="" type="checkbox"/>					
Work Type Groups	<input checked="" type="checkbox"/>					

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	
Read	<input checked="" type="checkbox"/>					
View All Records	<input checked="" type="checkbox"/>					
Modify All Records	<input checked="" type="checkbox"/>					
View All Fields	<input checked="" type="checkbox"/>					
Billing	<input checked="" type="checkbox"/>					
Customer Orders	<input checked="" type="checkbox"/>					
Items	<input checked="" type="checkbox"/>					

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	
Read	<input checked="" type="checkbox"/>					
View All Records	<input checked="" type="checkbox"/>					
Modify All Records	<input checked="" type="checkbox"/>					
View All Fields	<input checked="" type="checkbox"/>					
Jewel Customers	<input checked="" type="checkbox"/>					
Prices	<input checked="" type="checkbox"/>					

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	
Read	<input checked="" type="checkbox"/>					
View All Records	<input checked="" type="checkbox"/>					
Modify All Records	<input checked="" type="checkbox"/>					
View All Fields	<input checked="" type="checkbox"/>					
gunda gowripriya	<input checked="" type="checkbox"/>					
Internet access	<input checked="" type="checkbox"/>					

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	
Read	<input checked="" type="checkbox"/>					
View All Records	<input checked="" type="checkbox"/>					
Modify All Records	<input checked="" type="checkbox"/>					
View All Fields	<input checked="" type="checkbox"/>					
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>				
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>				
Jewellery Inventory System (Jewellery_Inventory_System)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	
Read	<input checked="" type="checkbox"/>					
View All Records	<input checked="" type="checkbox"/>					
Modify All Records	<input checked="" type="checkbox"/>					
View All Fields	<input checked="" type="checkbox"/>					
Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>				
WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>				

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	
Read	<input checked="" type="checkbox"/>					
View All Records	<input checked="" type="checkbox"/>					
Modify All Records	<input checked="" type="checkbox"/>					
View All Fields	<input checked="" type="checkbox"/>					
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>				
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>				
Jewellery Inventory System (Jewellery_Inventory_System)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	
Read	<input checked="" type="checkbox"/>					
View All Records	<input checked="" type="checkbox"/>					
Modify All Records	<input checked="" type="checkbox"/>					
View All Fields	<input checked="" type="checkbox"/>					
Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>				
WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>				

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	
Read	<input checked="" type="checkbox"/>					
View All Records	<input checked="" type="checkbox"/>					
Modify All Records	<input checked="" type="checkbox"/>					
View All Fields	<input checked="" type="checkbox"/>					
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>				
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>				
Jewellery Inventory System (Jewellery_Inventory_System)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	
Read	<input checked="" type="checkbox"/>					
View All Records	<input checked="" type="checkbox"/>					
Modify All Records	<input checked="" type="checkbox"/>					
View All Fields	<input checked="" type="checkbox"/>					
Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>				
WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>				

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	
Read	<input checked="" type="checkbox"/>					
View All Records	<input checked="" type="checkbox"/>					
Modify All Records	<input checked="" type="checkbox"/>					
View All Fields	<input checked="" type="checkbox"/>					
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>				
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>				
Jewellery Inventory System (Jewellery_Inventory_System)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	
Read	<input checked="" type="checkbox"/>					
View All Records	<input checked="" type="checkbox"/>					
Modify All Records	<input checked="" type="checkbox"/>					
View All Fields	<input checked="" type="checkbox"/>					
Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>				
WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>				

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	
Read	<input checked="" type="checkbox"/>					
View All Records	<input checked="" type="checkbox"/>					
Modify All Records	<input checked="" type="checkbox"/>					
View All Fields	<input checked="" type="checkbox"/>					
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>				
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>				
Jewellery Inventory System (Jewellery_Inventory_System)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	
Read	<input checked="" type="checkbox"/>					
View All Records	<input checked="" type="checkbox"/>					
Modify All Records	<input checked="" type="checkbox"/>					
View All Fields	<input checked="" type="checkbox"/>					
Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>				
WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>				

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	
Read	<input checked="" type="checkbox"/>					
View All Records	<input checked="" type="checkbox"/>					
Modify All Records	<input checked="" type="checkbox"/>					
View All Fields	<input checked="" type="checkbox"/>					
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>				
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>				
Jewellery Inventory System (Jewellery_Inventory_System)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	
Read	<input checked="" type="checkbox"/>					
View All Records	<input checked="" type="checkbox"/>					
Modify All Records	<input checked="" type="checkbox"/>					
View All Fields	<input checked="" type="checkbox"/>					
Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>				
WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>				

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	
Read	<input checked="" type="checkbox"/>					
View All Records	<input checked="" type="checkbox"/>					
Modify All Records	<input checked="" type="checkbox"/>					
View All Fields	<input checked="" type="checkbox"/>					
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>				
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>				
Jewellery Inventory System (Jewellery_Inventory_System)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	
Read	<input checked="" type="checkbox"/>					
View All Records	<input checked="" type="checkbox"/>					
Modify All Records	<input checked="" type="checkbox"/>					
View All Fields	<input checked="" type="checkbox"/>					
Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>				
WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>				

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	
Read	<input checked="" type="checkbox"/>					
View All Records	<input checked="" type="checkbox"/>					
Modify All Records	<input checked="" type="checkbox"/>					
View All Fields	<input checked="" type="checkbox"/>					
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>				
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>				
Jewellery Inventory System (Jewellery_Inventory_System)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	
Read	<input checked="" type="checkbox"/>					
View All Records	<input checked="" type="checkbox"/>					
Modify All Records	<input checked="" type="checkbox"/>					
View All Fields	<input checked="" type="checkbox"/>					
Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>				
WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>				

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	
Read	<					

Document 1.docx Maha Team Dashboard | Sales Profiles | Salesforce Smartinternz Smartinternz + - X

ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eQy00000C9RbZ%2Fe%3FretURL%3D%252F00...

Cloud Search Setup Object Manager

Setup Home Object Manager

Q profil

Users Profiles

Didn't find what you're looking for?  
Try using Global Search.

SETUP Profiles

Contact Point Emails User External Credentials

	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Billings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Customer Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Items	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Jewel Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Prices	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						

Custom Object Permissions

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: -None-

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Finance headline: India reported 11...

Search

ENG IN 18:42 28-02-2025

## ♥ Validation Rules: -

The screenshot shows the 'Validation Rule Edit' screen for an 'Item' object. The 'Rule Name' is 'ValidationRule\_For\_Item'. The 'Active' checkbox is checked. The 'Error Condition Formula' field contains the following code:

```
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( Price_c ), ISBLANK( Stone_Weight_c ), ISBLANK( Silver_Price_c ), ISBLANK( Stone_Other_Price_c ), ISBLANK( Stone_Weight_c ), ISBLANK( Weight_c ) )
```

An error message 'Error: Syntax error. Missing ')' is displayed below the formula. A tooltip for the 'ABS' function is visible on the right.

The screenshot shows the same 'Validation Rule Edit' screen, but now the formula is corrected:

```
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( Price_c ), ISBLANK( Stone_Weight_c ), ISBLANK( Silver_Price_c ), ISBLANK( Stone_Other_Price_c ), ISBLANK( Stone_Weight_c ), ISBLANK( Weight_c ) )
```

The 'Check Syntax' button shows 'No errors found'. The formula is now valid.

# Flows:

The screenshot shows the Flow Builder interface for a Record-Triggered Flow. The flow starts with a "Start" record-triggered flow element, which triggers an "Action Notice" element. The "Action Notice" element has a "Run Immediately" scheduled path. The flow is active and was last saved on 26/2/2025, 09:53 pm.

**Flow Details:**

- Object:** Billing
- Trigger:** A record is created or updated
- Optimize for:** Actions and Related Records
- Add Scheduled Paths (Optional)**
- Open Flow Trigger Explorer for Billing**

**Action Notice Element:**

- Run Immediately**

**Toolbox Elements:**

- Interaction (3): Action, Subflow, Custom Error
- Logic (6): Assignment, Decision, Loop, Transform, Collection Sort, Collection Filter
- Data (4): Create Records, Update Records, Get Records

The screenshot shows the configuration of the "Send Email" action within the flow. The "Edit Send Email" dialog is open, displaying the following settings:

- Body:** Emailbody (Included)
- CC Recipient Address List:** Not included
- Email Template ID:** Not included
- Log Email on Send:** Not included
- Recipient Address Collection:** Not included
- Recipient Address List:** ...Billing\_c > Item > Customer Name > Email (Included)

**Toolbox Elements:**

- 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

## ❖ **User Adoption:** -

We created some jewel customers, items ,billings ,prices ,customer orders in Jewelry Inventory System.

The screenshot shows a web browser window with multiple tabs open. The active tab is titled 'Jewel Customers' under 'Jewellery Inventory ...'. The page displays a list of recently viewed customers, each with a checkbox next to their name. The names listed are Nandkishore, Gowri, and Maha. At the top right of the list, there are buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. Below the list is a search bar and a toolbar with various icons. The system interface includes a header with the SSGS logo and a footer with system status information like weather and date.

The screenshot shows a detailed view of a customer record for 'Maha'. The title bar indicates the record is for 'Maha | Jewel Custom...'. The main area is titled 'Details' and contains fields for Customer name (Maha), Phone (09876543210), Email (gundagowripriya@gmail.com), Owner (Maha Team SSGS), Street (tilak Nagar), City (Guntakal), State (Andhra Pradesh), Country (India), Zip/Postal code (515801), and both Created By and Last Modified By (Maha Team SSGS). The bottom of the screen shows a standard Windows taskbar with various icons and system status indicators.

The screenshot shows a web browser window with multiple tabs open. The active tab is titled "Jewellery Inventory ... Jewel Customers". A sidebar on the left lists "Recently Viewed" items: "Customer name", "Nandkishore", "Gowri", and "Maha". A dropdown menu is open over the "Customer name" item, showing options like "Items", "Prices", "Customer Orders", "Billings", "Reports", and "Dashboards". The main content area displays a table with columns for "Customer name" and "Last Viewed". The table has three rows corresponding to the recently viewed items.

The screenshot shows a web browser window with multiple tabs open. The active tab is titled "Billing-01 | Billing". The main content area displays the "Billing-01" record. The "Details" tab is selected, showing the following fields and their values:

Field	Value
Billing Name	Billing-01
Amount	₹3,20,000.00
Item	Item-01
Gold/Silver Price	₹8,000.00
KDM Charge	₹32,000
Making Charges	₹15,000.00
Stones/Other Price	₹10,00,000
Total Amount	₹3,77,000
Created By	Maha Team SSGS, 26/02/2025, 4:42 pm
Last Modified By	Maha Team SSGS, 26/02/2025, 4:42 pm

Document 1.docx Recently Viewed Email Notifications Email Notifications Smartinternz Smartinternz (37) demo video

ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/o/Price\_\_c/list?filterName=\_Recent

Jewellery Inventory ... Prices Nandkishore | Jewel ... Maha | Jewel Custom... Billing-01 | Billing

Prices Recently Viewed

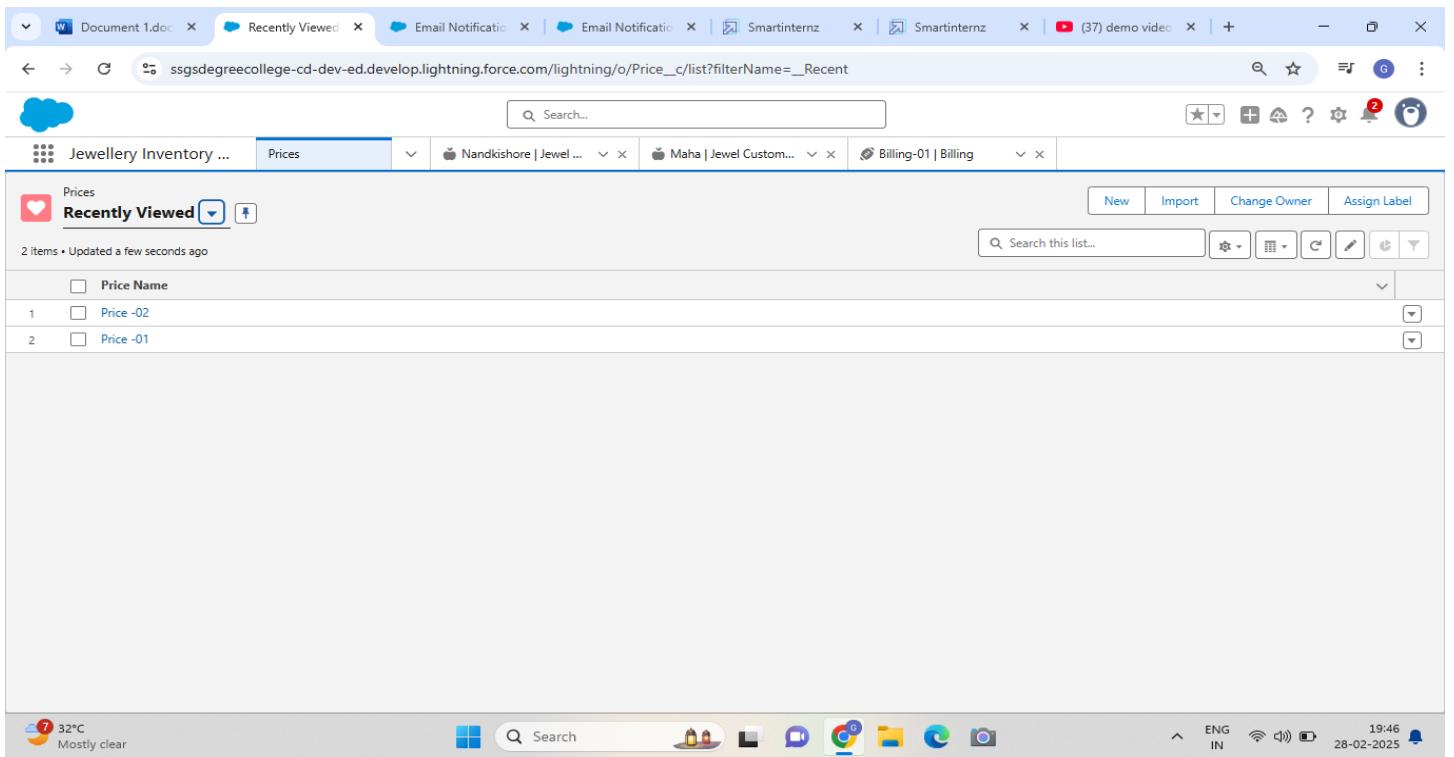
2 items • Updated a few seconds ago

	Price Name	
1	Price -02	
2	Price -01	

New Import Change Owner Assign Label

Search this list...

ENG IN 19:46 28-02-2025



## *(6). Key Scenarios Addressed by Salesforce in the Implementation Project:*

Salesforce implementation is a process of rolling out its core product — CRM (customer relationship management) system — to centralize all key business activities and communication.

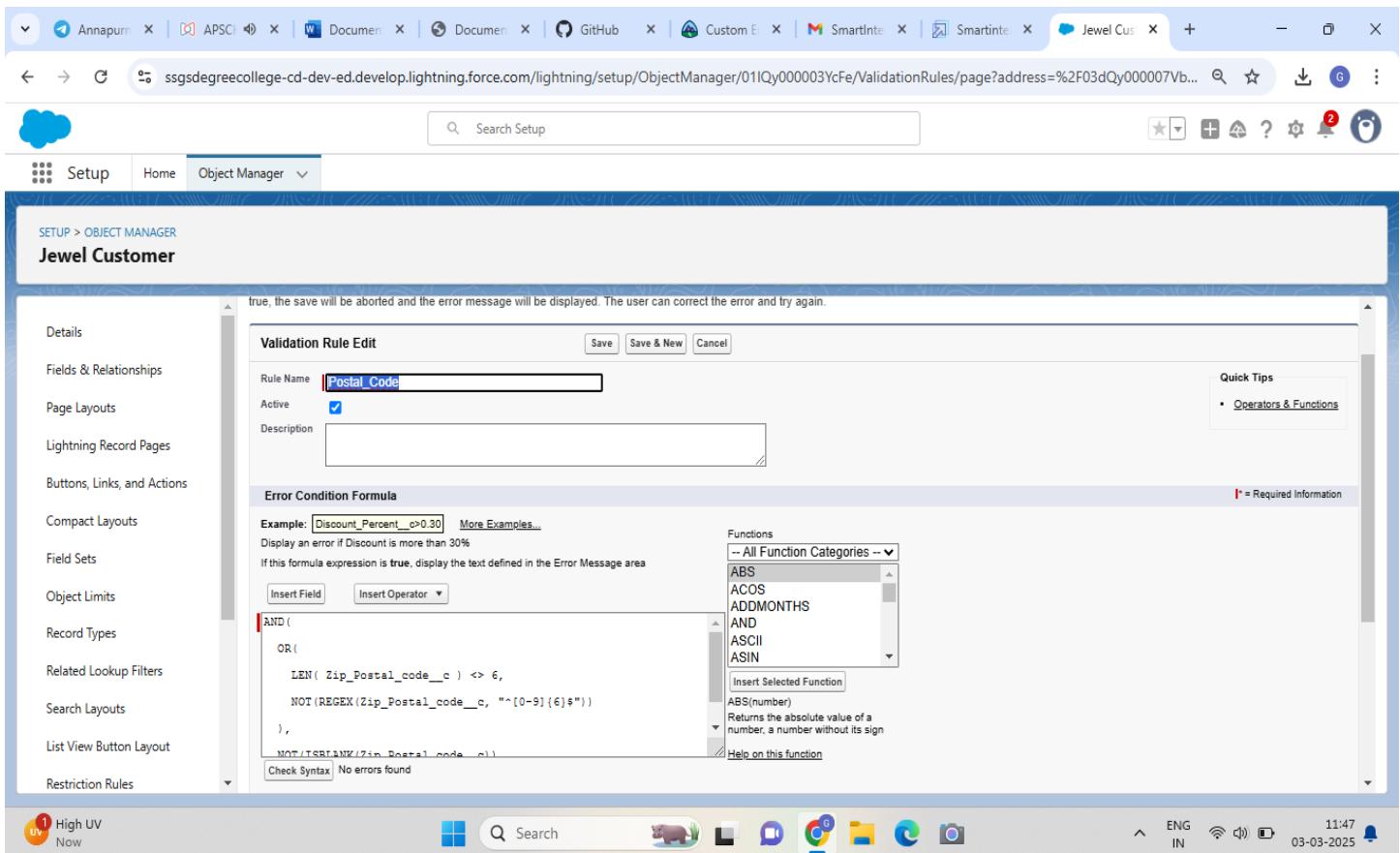
### **Validation Rules:-**

Created the validation rule for Postal Code field in Jewel Customer object .

In setup page ,in object manager selected jewel customer there we selected validation rules in that we entered the rule name as “postal Code ”. and inserted 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))  
)
```

We Entered the Error Message as “Must contain 6 digits”, selected the Error location as Field and selected the field as “Zip/Postal code”, and saved the rule.



Created One more Validation rule for Jewel Customer object.

Entered Rule name as “ValidationRule for JewelCustomerObject ”

## Question1: -What is the inserted Error Condition Formula?

**Solution:** -OR (ISBLANK( City\_\_c ),  
ISBLANK( Country\_\_c ),ISBLANK( Phone\_\_c ),ISBLANK( State\_\_c ),IS  
BLANK( Street\_\_c ))

## Question2: -What is the Error Message?

**Solution:** -The Error Message as “Please fill Required fields”.

The screenshot shows the 'Validation Rule Edit' screen in the Salesforce Setup. The 'Rule Name' is set to 'ValidationRule\_For\_JewelCustomerObject'. The 'Active' checkbox is checked. The 'Error Condition Formula' field contains the expression: `OR( ISBLANK( City__c ), ISBLANK( Country__c ), ISBLANK( Phone__c ), ISBLANK( State__c ), ISBLANK( Street__c ) )`. A tooltip for the `ABS` function is displayed, stating: 'Returns the absolute value of a number, a number without its sign'. The status bar at the bottom shows 'High UV Now' and the date '03-03-2025'.

Created Validation rule for Item object.

### **Question 3: -What is the entered rule?**

**Solution: -Entered Rule name as “ValidationRule for Item “.**

### **Question4: -What is the inserted Error Condition Formula?**

**Solution:-** 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 ))

### **Question5: -What is the Entered Error Message?**

**Solution:** -The Error message is “Please fill Required fields”.

**Validation Rule Edit**

Rule Name: ValidationRule\_For\_Item

Active:

Description:

Error Condition Formula

Example: Discount\_Percent\_c>0.30 [More Examples...](#)

If this formula expression is true, display the text defined in the Error Message area.

Functions

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function

ABS(number)  
Returns the absolute value of a number, a number without its sign

Check Syntax No errors found

## Jewelry Inventory System

**Question 1:-What is the ornament?**

**Solution:- Necklace**

**Question 2:-What is the price of a gold?**

**Solution:-\$800000**

**Question 3 :- What is the price of silver?**

**Solution :- \$700000**

## **Question 4:-What is the KDM charges?**

**Solution:** - ₹32,000

## **Question 5: -What is the stone/other price?**

**Solution:** -₹10,000

## **Question 6: -What is the percentage of Item?**

**Solution:** -10%

The screenshot shows a CRM application interface with a top navigation bar and a main details view for an item.

**Top Navigation Bar:**

- Jewellery Inventory ...
- Reports
- Maha | Jewel...
- Item-01 | Item
- Price -01 | Pr...
- Customer Or...
- Billing-01 | B...
- Maha Team ...
- Prices Report

**Main View:**

**Item-01**

Related	Details
Item Id	Percentage
Item-01	10
Customer Name	Prices
Maha	Price -01
Item Type	Gold Price
Gold	₹8,000.00
Ornament	Silver Price
Necklace	70.000
Weight	Purity Gold Price
50.00000	8,000.00
Total Weight	KDM
40.000	₹32,000
Stone Weight	Making Charges
10.00000	₹15,000
Purity	Stone/Other Price
24	₹10,000.00
Expected Days Of Return	Amount
4-5 Days	₹3,20,000.00
Priority	Owner
High	Maha Team SSGS
Created By	Last Modified By
Maha Team SSGS, 26/02/2025, 4:39 pm	Maha Team SSGS, 03/03/2025, 3:31 pm

<https://ssasdeareecolae-cd-dev-ed.develop.iahtnina.force.com/iahtnina/r/Item/c/a01Ov00000tE9S2IAK/view>

Jewellery Inventory ... Reports Maha | Jewel... Item-01 | Item Price -01 | Pr... Customer Or... Billing-01 | B...

## Billing Billing-01

Related	Details
Billing Name	Amount
Billing-01	₹3,20,000.00
Item	Gold/Silver Price
Item-01	₹8,000.00
Ornament	KDM Charge
Necklace	₹32,000
Stone Weight	Making Charges
10.00	₹15,000.00
Weight	Stones/Other Price
40.00	₹10,000.00
Owner	Total Amount
Maha Team SSGS	₹3,77,000
Created By	Last Modified By
Maha Team SSGS, 26/02/2025, 4:42 pm	Maha Team SSGS, 26/02/2025, 4:42 pm



Search...

Jewellery Inventory ... Reports Maha | Jewel... Item-01 | Item Price -01 | Pr... Customer Or... Billing-01 | B...



Related

**Details**

Customer name	Owner
Maha	<a href="#">Maha Team SSGS</a>
Phone	Street
09876543210	tilak Nagar
Email	City
<a href="mailto:gundagowripriya@gmail.com">gundagowripriya@gmail.com</a>	Guntakal
	State
	Andhra Pradesh
	Country
	India
	Zip/Postal code
	515801
Created By	Last Modified By
<a href="#">Maha Team SSGS</a> , 26/02/2025, 4:05 pm	<a href="#">Maha Team SSGS</a> , 26/02/2025, 9:57 pm

Jewellery Inventory ... Reports Maha | Jewel... Item-01 | Item Price -01 | Pr... Customer Or... Billing-01 | B... Search...

Customer Order  
**Customer Order -01**

Related **Details**

Customer Order Name  
Customer Order -01

Customer  
Maha

Item  
Item-01

Order Status  
Started

Created By  
 Maha Team SSGS, 26/02/2025, 4:41 pm

Last Modified By  
 Maha Team SSGS, 26/02/2025, 4:41 pm

Jewellery Inventory ... Reports Maha | Jewel... Item-01 | Item Price -01 | Pr... Customer Or... Billing-01 | B... Search...

Price  
**Price -01**

Related **Details**

Price Name  
Price -01

Gold Price  
₹80,000.00000

Silver Price  
₹70,000.00000

Created By  
 Maha Team SSGS, 26/02/2025, 4:09 pm

Owner  
 Maha Team SSGS

Last Modified By  
 Maha Team SSGS, 26/02/2025, 4:09 pm

**In Billing Object:-**

We created a field "Total Amount" the data type is "Formula" and the record type is "Currency".

## Question1:-What is the advanced formula?

**Solution:** Amount\_c + KDM\_Charge\_c + Stones\_other\_price\_c + Making\_Charges\_c

The screenshot shows the Salesforce Object Manager interface for creating a new field named "Total Amount".

- Left Sidebar:** Shows various setup categories like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc.
- Top Bar:** Includes a search bar, setup icon, and navigation links for Home and Object Manager.
- Form Fields:**
  - Decimal Places: Set to 0.
  - Description: Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.
  - Example: Gross Margin = Amount - Cost\_c [More Examples...]
  - Formula Editor:
    - Simple Formula tab is selected.
    - Advanced Formula tab is available.
    - Insert Field button.
    - Insert Operator dropdown.
    - Functions dropdown menu:
      - All Function Categories
      - ABS
      - ACOS
      - ADDMONTHS
      - AND
      - ASCII
      - ASIN
    - Insert Selected Function button.
  - Check Syntax button: No syntax errors in merge fields or functions. (Compiled size: 1,172 characters)

## **(7) Conclusion:**

CRM is a software system that helps businesses manage their interactions with customers, clients, and prospects. It provides a centralized platform for managing customer data, communication, and interactions across various touchpoints.

CRM enables jewelry businesses to gain a deeper understanding of their customers. By gathering and analyzing customer data, businesses can identify buying patterns, preferences, and behaviors. This insight allows businesses to tailor their marketing and sales efforts to meet the specific needs and wants of their customers.

CRM refers to Customer Relationship Management

It is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple to improve Business relationships. A CRM system helps companies stay connected to customers, streamline processes & improve Profitability.



Jewelry businesses face a multitude of challenges, from fierce competition to changing consumer preferences and limited budgets for marketing and advertising. It can be a tough market to navigate, but the good news is that implementing a customer relationship management (CRM) system can help overcome many of these challenges.

One of the biggest challenges facing jewelry businesses is the need to stay relevant and top of mind with customers. With so many options available, consumers are easily distracted and can quickly forget about your brand. A CRM system can help you stay top of mind by enabling you to communicate with customers on a regular basis and provide personalized recommendations based on their preferences.

Another challenge is managing inventory and ensuring that you have the right products available at the right time. A CRM system can help you keep track of inventory levels and alert you when products are running low or need to be restocked. This can help you avoid lost sales due to out-of-stock items and ensure that you always have a variety of products available to meet customer demand.

Finally, jewelry businesses face the challenge of attracting new customers and retaining existing ones. A CRM system can help you identify customer segments and target them with personalized marketing messages that resonate with their specific interests and preferences.

By providing personalized recommendations and rewards for loyalty, you can create a positive customer experience that keeps customers coming back and drives revenue growth.

The jewelry industry is all about creating an emotional connection with customers. It's not just about selling a piece of jewelry, it's about creating an experience that makes the customer feel special and valued. That's why customer experience and loyalty are critical in the jewelry industry.

A good CRM system can help you achieve this. By capturing customer data and tracking their preferences and purchase history, you can tailor your offerings to their individual needs and tastes. This can lead to a more personalized experience for the customer, making them feel like they are being taken care of and understood.

In addition, a CRM system can help you stay in touch with your customers through targeted marketing campaigns and personalized communications. By sending them offers and information that is relevant to their interests, you can increase the likelihood of repeat business and foster a sense of loyalty.

A jewelry CRM project is a business initiative that uses customer relationship management (CRM) software to improve customer service and sales.



CRM is a tool that allows businesses to manage relationships with their customers effectively. It provides a structured interaction and gives businesses a better way of understanding their customers

Thank You Mam.....

