

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.

② We used the following **Objects:**

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

② We used **Tabs** such as

- Jewel Customer Tab
- Item Tab ..Etc

② We Created a Lightning App : **Jewellery Inventory System**

② **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.**

② **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

② We Entered Objects as :-

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

② **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”.

② **Validation Rules :**

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

③ **Profiles :**

We Created 2 Profiles :

- ✓ Gold Smith Profile
- ✓ Worker Profile

② 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 .

② 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

② 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”

② 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.

④ **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 C Silver object permission we selected “Read ,Edit C Create ”. We added Assignments which we used under Worker Profile users.

④ **User Adoption:**

In Jewlery Inventory System we created Jewel Customers under Jewel Customer Tab.

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

④ **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 Page Layouts, Lightning Record Pages, Buttons, etc. The main content area is titled 'Fields & Relationships' and displays 23 items, sorted by Field Label. Each row shows a field name, its type, and its formula or lookup relationship. The fields listed are: 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 interface includes standard Salesforce navigation and search tools.

Field	Type	Description
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 X APSCHE X Document 1 X Smartinternz X Smartinternz X Jewelcrm D X Jewel Custor X Google Pass X

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

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 ENG IN 10:47 28-02-2025

Salesforce A X APSCHE X Document 1 X Smartinternz X Smartinternz X Jewelcrm D X Billing | Sale X Google Pass X

ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Qy000003YhGv/FieldsAndRelationships/view

Cloud Setup Home Object Manager Search Setup

SETUP > OBJECT MANAGER Billing

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... ENG IN 10:48 28-02-2025

We used 2 Profile :

* Gold Smith Profile

* Worker Profile

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A search bar at the top right contains the text 'Search Setup'. The main area displays the 'Profile Edit' screen for the 'Worker' profile. The profile details are as follows:

Name	Value
Name	Worker
User License	Salesforce Platform
Description	[Empty]

Under 'Custom Profile', there is a checked checkbox. Below this, the 'Custom App Settings' section lists several app components with their visibility and default settings:

Component	Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>
Jewellery Inventory System (Jewellery_Inventory_System)	<input type="checkbox"/>	<input checked="" type="radio"/>
Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
WDC (standard__Work)	<input type="checkbox"/>	<input checked="" type="radio"/>

At the bottom of the page, there is a JavaScript error message: "javascript:srcUp(%27%2F00edM00000APPjp%2Fe%3FretURL%3D%252F00e%253Ffc%...)"

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A search bar at the top right contains the text 'Search Setup'. The main area displays the 'Profile Edit' screen for the 'Gold Smith' profile. The profile details are as follows:

Name	Value
Name	Gold Smith
User License	Salesforce
Description	[Empty]

Under 'Custom Profile', there is a checked checkbox. Below this, the 'Custom App Settings' section lists several app components with their visibility and default settings:

Component	Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>
Approvals (standard__Approvals)	<input type="checkbox"/>	<input type="radio"/>
My Service Journey (standard__MSJApp)	<input checked="" type="checkbox"/>	<input type="radio"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>

At the bottom of the page, there is a JavaScript error message: "javascript:srcUp(%27%2F00edM00000APOsb%2Fe%3FretURL%3D%252F00e%253Ffc%...)"

Lightening App:

The screenshot shows a browser window with multiple tabs open, including Salesforce, APSCHE, Document 1, Smartinternz, Recently Viewed, Billing | Sales, Google Pass, and others. The main content area displays a list titled "Recently Viewed" under "Jewel Customers". The list shows two items: "Maha" and "Gowri", each with a checkbox next to it. The interface includes standard Salesforce navigation and search tools.

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

Windows taskbar icons: File Explorer, Edge, Google Chrome, File, Camera, Task View, Start button, Network, Battery, Volume, Date/Time (28-02-2025), and a notification icon.

Roles:

The screenshot shows the Salesforce Setup Roles page for the 'Gold Smith' role. The left sidebar shows navigation under 'Users' and 'Roles'. The main content area displays the 'Role Detail' for 'Gold Smith', which includes fields for Label (Gold Smith), This role reports to (Installation & Repair Services), Modified By (Mahabooob bee Team), Opportunity Access (Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities), and Case Access (Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases). Below this is a table titled 'Users in Gold Smith Role' showing one user: Niklaus Mikaelson (nmika, niku@apsche.com, Active). A note at the bottom suggests using Global Search.

The screenshot shows the Salesforce Setup Roles page with a hierarchical list of roles. The tree view includes COO, SVP, Customer Service & Support, Customer Support, International, Customer Support, North America, Installation & Repair Services, Gold Smith, Worker, SVP, Human Resources, SVP, Sales & Marketing, VP, International Sales, VP, Marketing, and VP, Marketing. Each role has 'Edit | Del | Assign' options. The left sidebar shows navigation under 'Users' and 'Roles'. A note at the bottom suggests 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 'Active', 'Marketing User', 'Offline User', etc. A note at the top right indicates 'Required Information'.

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' section shows the following information:

Name	Value	Role	Value
Name	Kol Mikaelson	User License	Salesforce Platform
Alias	mika	Profile	Worker
Email	gundagowripriya@gmail.com [Verify]	Active	<input checked="" type="checkbox"/>
Username	niku@apsche.com	Marketing User	<input type="checkbox"/>
Nickname	Niku	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address		Site.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User	<input type="checkbox"/>
Locale	English (India)		

Below the table, links for 'Permission Set Assignments', 'Public Group Membership', and 'Queue Membership' are visible.

We Created 2 Pagelayouts: Page Layout for Gold & Silver

The screenshot shows the Salesforce Setup interface for the Item object. The left sidebar is expanded, showing various setup categories like Details, Fields & Relationships, and Page Layouts. Under Page Layouts, the 'Page Layout for Silver' is selected. The main area displays the page layout configuration for the Item object. The layout includes a header bar with Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties buttons. Below the header is a 'Fields' section containing a table with columns for Field Name, Type, and Description. The table includes fields such as Customer Name, Item Type, Ornament, Priority, Silver Price, and Weight. A 'Blank Space' field is also present. The 'Item Sample' panel below the table shows a sample record with values for Gold Price, Last Modified By, Percentage, Purity Gold Price, Stone Weight, and Total Weight. The 'Highlights Panel' and 'Quick Actions in the Salesforce Classic' sections are also visible.

The screenshot shows the Salesforce Setup interface for the Item object. The left sidebar is expanded, showing various setup categories like Details, Fields & Relationships, and Page Layouts. Under Page Layouts, the 'Page Layout for Gold' is selected. The main area displays the page layout configuration for the Item object. The layout includes a header bar with Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties buttons. Below the header is a 'Fields' section containing a table with columns for Field Name, Type, and Description. The table includes fields such as Customer Name, Item Type, Ornament, Priority, Silver Price, and Weight. A 'Blank Space' field is also present. The 'Information' panel below the table shows sample data for fields like Item Id, Item Type, Prices, Gold Price, Customer Name, Ornament, Weight, Stone Weight, Percentage, Stone/Other Price, and Expected Days Of Return. The 'Owner' field is also listed as Sample Text. The 'Highlights Panel' and 'Quick Actions in the Salesforce Classic' sections are also visible.

We created 3 Reports:

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

The screenshot shows the Salesforce Lightning interface for report building. The URL is ssgsdegreecollege39-dev-ed.lightning.force.com/lightning/r/Report/00OdM00000AR3iPUAT/edit?queryScope=userFolders. The report title is "Jewellery Inventory ...". The left sidebar shows "REPORT" and "Prices Report". The main area displays a preview of a limited number of records with columns: Price: Price, Gold Price, and Silver Price. The data rows are: 1. Price-03, ₹123.45000, ₹123.45000; 2. Price-04, -, ₹123.45000; 3. Price-03, ₹123.45000, ₹246.90000. The interface includes buttons for "Add Chart", "Save & Run", "Save", "Close", and "Run". A status bar at the bottom shows weather (Sunny), time (13:29), date (25-02-2025), and system info (ENG IN).

The screenshot shows the Salesforce Lightning interface for report building. The URL is ssgsdegreecollege-cd-dev-ed.lightning.force.com/lightning/r/Report/00OQy0000CZGURMA5/view?queryScope=userFolders. The report title is "Billings with Item Report". The main area displays a table with columns: Total Records, Total Amount, Total Total Amount, Total KDM Charge, Total Making Charges, Total Stones/Other Price, and Total Stone Weight. The data rows are: 1. Gold (2) Billing-01, Item-01, ₹3,20,000.00, Necklace, ₹3,77,000, ₹32,000, ₹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. Subtotal, , ₹7,20,000.00, , ₹8,95,000, ₹1,12,000, ₹33,000.00, ₹30,000.00, 20.00. 2. Silver (1) Billing-05, Item-03, ₹5,600.00, Necklace, ₹17,160, ₹560, ₹1,000.00, ₹10,000.00, 20.00. Subtotal, , ₹5,600.00, , ₹17,160, ₹560, ₹1,000.00, ₹10,000.00, 20.00. Total (3), , ₹7,25,600.00, , ₹9,12,160, ₹1,12,560, ₹34,000.00, ₹40,000.00, 40.00. The interface includes buttons for "Enable Field Editing", "Search", "Add Chart", "Edit", and "Row Counts", "Detail Rows", "Subtotals", "Grand Total". A status bar at the bottom shows weather (Haze), time (11:05), date (28-02-2025), and system info (ENG IN).

The screenshot shows a Salesforce Lightning interface. At the top, there are several tabs: 'Salesforce Admin', 'APSCHE LongTe...', 'Smartinternz Cr...', 'Smartinternz', 'Billings with item', 'Billing | Salesfor...', and 'Document 1.doc'. The current page is 'Billings with item'.

The main content area has a title 'Report: Billings' and a subtitle 'Billings with item and Customer order'. It displays a table with one column labeled 'Billing: Billing Name' containing three rows: 'Billing-01', 'Billing-02', and 'Billing-05'. There are buttons for 'Enable Field Editing', 'Add Chart', 'Edit', and 'More'.

The bottom status bar shows the weather as '26°C Haze', system language as 'ENG IN', and the date/time as '28-02-2025 11:07'.

DashBoard:

The screenshot shows a Salesforce Lightning interface. At the top, there are several tabs: 'Salesforce Admin', 'APSCHE Lon...', 'Smartinternz Cr...', 'Smartinternz', 'Recent | Dashbo...', 'Billing | Salesfor...', and 'Document 1.doc'. The current page is 'Recent | Dashbo...'. A sidebar on the left lists categories: 'Dashboards', 'Recent' (with 2 items), 'Created by Me', 'Private Dashboards', 'All Dashboards', 'Folders', 'All Folders', 'Created by Me', 'Shared with Me', 'Favorites', and 'All Favorites'.

The main content area shows a table of recent dashboards:

	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Jewelcrm Dashboard		Private Dashboards	Maha Team SSGS	26/2/2025, 9:40 pm	
Created by Me	Maha Team Dashboard		Private Dashboards	Maha Team SSGS	26/2/2025, 10:30 am	

The bottom status bar shows the weather as '26°C Haze', system language as 'ENG IN', and the date/time as '28-02-2025 11:15'.

Salesforce Admin | APSCHE L... | Smartinternz Cr... | 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

Jewelcrm Dashboard
Last refreshed 1 day ago. Refresh this dashboard to see the latest data.
As of 28-Feb-2025, 9:59 pm Viewing as Maha Team SSGS

Billings with Item Report

Sum of Amount: ₹720k

₹720K

Item: Item Type:
Gold
Other

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

Prices Report

Price: Price Name ↑	Gold Price	Silver Price
Price -01	₹80.00000k	₹80.00000k
Price -02	₹90.00000k	₹80.00000k

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

26°C Haze

Search

ENG IN 11:15 28-02-2025

Salesforce Admin | APSCHE L... | Smartinternz Cr... | Smartinternz | Maha Team 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... Jewelcr... More

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-05

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

26°C Haze

Search

ENG IN 11:16 28-02-2025

Validation Rules:

Created Validation Rules under Jewel Customer CI

The screenshot shows two validation rules created under the 'Jewel Customer' object in Salesforce.

Item Validation Rule

Validation Rule Detail	
Rule Name	ValidationRule_For_Item
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

Jewel Customer Validation Rule

Validation Rule Detail	
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, 26/02/2025, 2:24 pm
Modified By	Maha Team SSGS, 03/03/2025, 11:49 am

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

ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lQy000003YcFe/ValidationRules/view

Cloud Search Setup 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

4 28°C Mostly sunny ENG IN 11:28 28-02-2025

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

ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lQy000003YfDV/ValidationRules/view

Cloud Search Setup 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

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

2 38°C Mostly sunny ENG US 16:42 03-03-2025

Salesforce A X APSCHE X SmartInternz X Smartinternz X Maha Team X Jewel Cust... X Document 1 X (37) Salesfor... X +

ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Qy000003YcFe/ValidationRules/03dQy000007VbIbIAK/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 28/02/2025, 2:28 pm	Modified By	Maha Team SSGS 28/02/2025, 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

Setup Home Object Manager

SETUP > OBJECT MANAGER

Item

Back to Item

Item Validation Rule

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

ENG IN 11:29 28-02-2025

Setup Home Object Manager

SETUP > OBJECT MANAGER

Item

Back to Item

Item Validation Rule

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

Setup Home Object Manager

SETUP > OBJECT MANAGER

Item

Back to Item

Item Validation Rule

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

ENG IN 11:30 28-02-2025

The screenshot shows the Salesforce Object Manager interface for the 'Jewel Customer' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the 'Validation Rule Detail' for the 'Postal_Code' field. The rule is defined as follows:

```
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"
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 C
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.... The page title is "Edit Field Dependency". It displays a grid where the "Controlling Field" is "Priority" and the "Dependent Field" is "Expected Days Of Return". The "Legend" indicates that yellow cells represent "Included Value" and white cells represent "Excluded Value". The "Instructions" section provides guidance on how to use the grid. The bottom right corner of the window shows the date and time as 28-02-2025.

Edit Field Dependency

Controlling Field: Priority
Dependent Field: Expected Days Of Return

Legend: Excluded Value Included Value

Instructions:

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- Use the **Inclusion** or **Exclusion** button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells.
- Double click on a cell to toggle its visibility for the Dependent field.
- Use the **Preview** button to test the results.

Priority: Expected Days Of Return: Legend: Excluded Value Included Value

Priority	1-3 Days	3-5 Days	4-5 Days	5-10 Days	8-10 Days	10+ Days
Priority	1-3 Days	3-5 Days	4-5 Days	5-10 Days	8-10 Days	10+ Days
Expected Days Of Return	1-3 Days	3-5 Days	4-5 Days	5-10 Days	8-10 Days	10+ Days

Showing Columns: 1 - 4 (of 4) < Previous | Next > View All

Item

Item Field Dependencies

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

Showing Columns: 1 - 4 (of 4) < Previous | Next > View All

Tabs:

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

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected in the sidebar. The main content area displays the 'Custom Tabs' page, which lists custom object tabs, web tabs, and visualforce tabs. The 'Custom Object Tabs' section shows five tabs: 'Billings' (Balls style), 'Customer Orders' (Alarm clock style), 'Items' (Airplane style), 'Jewel Customers' (Apple style), and 'Prices' (Heart style). The 'Web Tabs' and 'Visualforce Tabs' sections are currently empty.

Action	Label	Tab Style	Description
Edit Del	Billings	Balls	
Edit Del	Customer Orders	Alarm clock	
Edit Del	Items	Airplane	
Edit Del	Jewel Customers	Apple	
Edit Del	Prices	Heart	

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

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

Flows
Recently Viewed

1 item • Updated a few seconds ago

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

29°C Partly sunny 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. On the left, the 'Record Types' section is selected. It 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 a search bar at the top and various navigation tabs like Setup, Home, and Object Manager.

The screenshot shows the details page for the 'Gold' record type under the 'Item' object. The 'Record Type Label' is set to 'Gold'. The 'Record Type Name' is also 'Gold'. The 'Namespace Prefix' is empty. The 'Description' is "'Gold items information'". The 'Created By' field shows 'Maha Team SSGS, 26/02/2025, 6:09 pm'. The 'Modified By' field shows 'Maha Team SSGS, 26/02/2025, 6:09 pm'. Below this, there is a section titled 'Picklists Available for Editing' which lists three fields: 'Expected Days Of Return', 'Item Type', and 'Priority'. Each field has an 'Edit' link next to it. The interface includes a search bar at the top and various navigation tabs like Setup, Home, and Object Manager.

Document 1.docx | Maha Team Dashboard | Item | Salesforce | Email Notification | Email Notification | Smartinternz | Smartinternz | +

ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lQy000003YfDV/RecordTypes/012Qy000005b79QIAQ/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Item

Record Type
Silver [Edit](#)

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, 26/02/2025, 6:11 pm
Modified By: Maha Team SSGS, 26/02/2025, 6:11 pm

Active ✓

Picklists Available for Editing

Action	Field	Modified Date
Edit	Expected Days Of Return	26/02/2025, 6:11 pm
Edit	Item Type	26/02/2025, 6:11 pm
Edit	Priority	26/02/2025, 6:11 pm

Help for this Page

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

♥ Permission Sets :-

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

Document 1.docx | Maha Team Dashboard | Permission Sets | Email Notification | Email Notification | Smartinternz | Smartinternz | +

ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PSQy00000DsicU

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 Set Overview

Description	API Name
permission for worker	Per_to_Worker

Namespace Prefix: Maha Team SSGS
Created By: Maha Team SSGS, 26/02/2025, 8:57 pm
Last Modified By: Maha Team SSGS, 26/02/2025, 8:58 pm

Apps

Assigned Apps
Assigned Connected Apps
Object Settings
App Permissions
Apex Class Access
Visualforce Page Access

Video Tutorial | Help for this Page

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

The screenshot shows the Salesforce Setup interface under the 'Permission Sets' section. A search bar at the top has 'permis' typed into it. On the left, a sidebar shows 'Users' and 'Permission Set Groups'. The main area displays the 'Permission Set' for 'Per to Worker'. It includes tabs for 'Find Settings...', 'Clone', 'Edit Properties', 'Manage Assignments', and 'View Summary'. Below these are sections for 'Items', 'Tab Settings', 'Item: Record Type Assignments', and 'Object Permissions'. Under 'Object Permissions', the 'Read', 'Create', 'Edit', and 'Delete' permissions are listed for the 'Gold' record type. The status bar at the bottom indicates it's 33°C and mostly sunny.

♥ Profiles :-

We created 2 Profiles and given name as

- ❖ Gold Smith Profile
- ❖ Worker Profile

The screenshot shows the Salesforce Setup interface under the 'Profiles' section. A search bar at the top has 'profil' typed into it. On the left, a sidebar shows 'Users' and 'Profiles'. The main area displays the 'Profile Edit' screen for 'Gold Smith'. It includes fields for 'Name' (set to 'Gold Smith'), 'User License' (set to 'Salesforce'), and 'Description'. A 'Custom Profile' checkbox is checked. Below this is a 'Custom App Settings' section with two tables of application settings. The first table lists 'All Tabs (standard__AllTabSet)', 'Analytics Studio (standard__Insights)', 'App Launcher (standard__AppLauncher)', 'Approvals (standard__Approvals)', 'Automation (standard__FlowsApp)', and 'Bolt Solutions (standard__LightningBolt)'. The second table lists 'My Service Journey (standard__MSJApp)', 'Queue Management (standard__QueueManagement)', 'Sales (standard__Sales)', 'Sales Console (standard__SalesConsole)', and 'Salesforce Chatter (standard__Chatter)'. The status bar at the bottom indicates it's 33°C and mostly sunny.

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

Search Setup

Setup Home Object Manager

Q profil

Users Profiles

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

Profiles

Individuals Inventory Reservations Work Type Groups

Custom Object Permissions

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

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

gunda gowri priya Internet access

33°C Mostly sunny

Search

ENG IN 18:36 28-02-2025

This screenshot shows the 'Profiles' setup page in Salesforce. It displays a grid of permissions for various profiles (Individuals, Inventory Reservations, Work Type Groups) across different custom objects (Billing, Customer Orders, Items). The 'Custom Object Permissions' section includes columns for Basic Access, Create, Edit, Delete, Data Administration, View All Records, Modify All Records, and View All Fields. Below this, there are sections for Session Settings and Password Policies, including password expiration, history, length, and complexity requirements. The bottom of the screen shows the Windows taskbar with various pinned icons and system status.

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

Search Setup

Setup Home Object Manager

Q profil

Users Profiles

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

Profile Edit

Worker Profile

Set the permissions and page layouts for this profile.

Profile Edit

Name: Worker Profile

User License: Salesforce Platform

Description:

Custom Profile: ✓

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>
Jewellery Inventory System (Jewellery_Inventory_System)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>			

Service Provider Access

Tab Settings

Finance headline India reported 11...

Search

ENG IN 18:42 28-02-2025

This screenshot shows the 'Profile Edit' page for the 'Worker Profile' in Salesforce. It includes fields for Name, User License (Salesforce Platform), and Description. The 'Custom App Settings' section maps various standard objects to specific apps, such as Analytics Studio and Platform. The bottom of the screen shows the Windows taskbar with pinned icons and system status.

Document 1.docx Maha Team Dashboard | Sales Smartinternz Smartinternz

ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eQy0000C9RbZ%2Fe%3FretURL%3D%252F00...

Search Setup

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

Custom Object Permissions

	Basic Access				Data Administration			Basic Access				Data Administration		
	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
Billing	<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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>											
Items	<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"/>						
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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prices	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>											

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

6 Finance headline
India reported 11...

Search

ENG IN 18:42 28-02-2025

♥ Validation Rules:-

The screenshot shows the Salesforce Validation Rule Editor for the 'Item' object. The rule name is 'ValidationRule_For_Item'. The formula is:

```
OR( ISBLANK( Amount_c ), ISBLANK( Customer_Name_c ), ISBLANK( Gold_Price_c ), ISBLANK( KGM_c ), ISBLANK( Ornament_c ), ISBLANK( Percentage_c ), ISBLANK( Making_Charges_c ), ISBLANK( Prices_c ), ISBLANK( Stone_Other_Price_c ), ISBLANK( Stone_Weight_c ), ISBLANK( Weight_c ) )
```

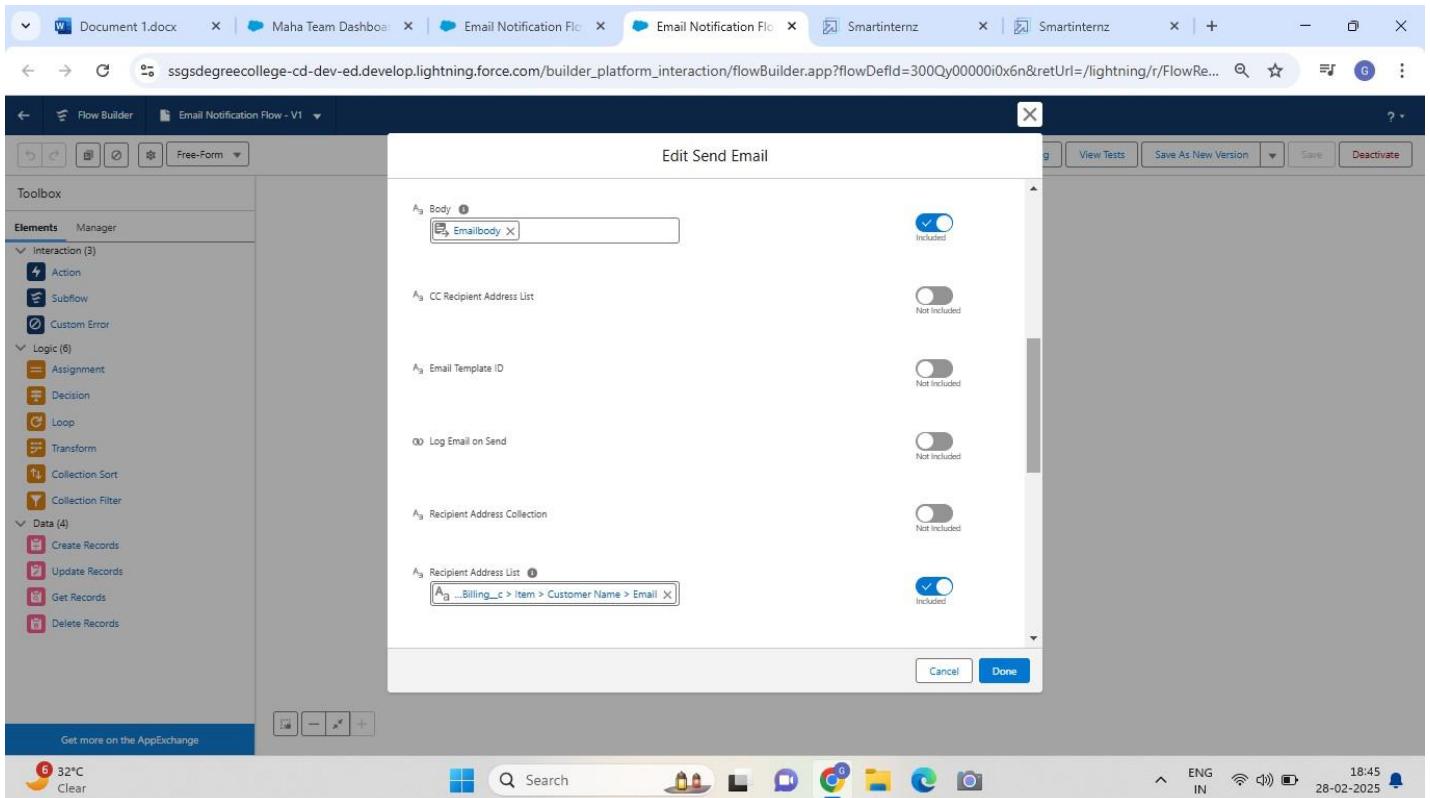
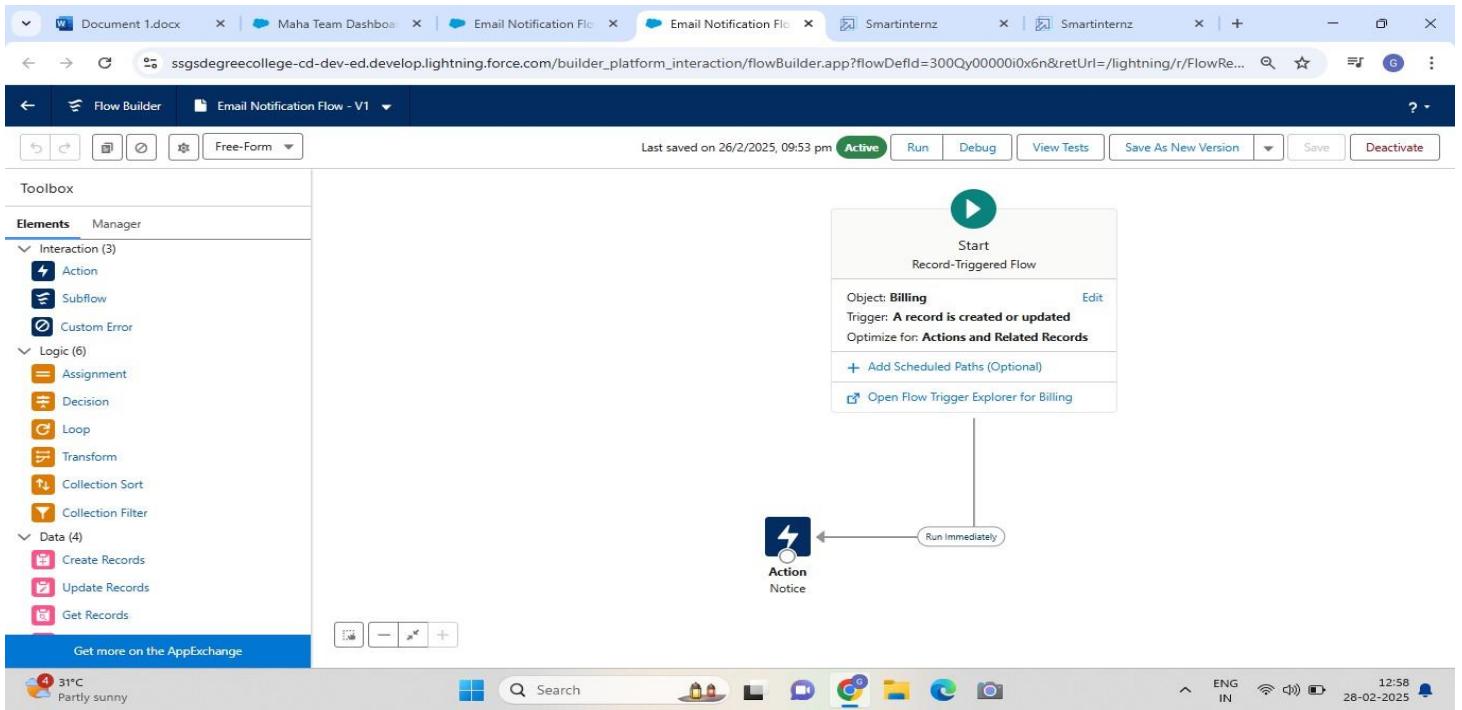
An error message is displayed: "Check Syntax Error: Syntax error. Missing ')'". A tooltip for the 'ABS' function is visible on the right.

The screenshot shows the same Validation Rule Editor after the formula was corrected. The formula now includes parentheses around each term:

```
OR( ISBLANK( Amount_c ), ISBLANK( Customer_Name_c ), ISBLANK( Gold_Price_c ), ISBLANK( KGM_c ), ISBLANK( Ornament_c ), ISBLANK( Percentage_c ), ISBLANK( Making_Charges_c ), ISBLANK( Prices_c ), ISBLANK( Stone_Other_Price_c ), ISBLANK( Stone_Weight_c ), ISBLANK( Weight_c ) )
```

The error message is now gone, and the status bar indicates "No errors found".

Flows:



❖ 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 'Jewellery Inventory ...' and shows a list of 'Jewel Customers'. The list is titled 'Recently Viewed' and contains three items: Nandkishore, Gowri, and Maha. Each item has a checkbox next to it. The browser interface includes a search bar, a toolbar with various icons, and a status bar at the bottom showing weather, language, and date.

The screenshot shows a detailed view of a 'Jewel Customer' named 'Maha'. The view is divided into 'Related' and 'Details' sections. In the 'Details' section, the customer's information is listed: 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 Last Modified By (Maha Team SSGS, 26/02/2025, 9:57 pm). The browser interface is similar to the previous screenshot, with a toolbar and a status bar at the bottom.

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, including "Customer name": Nandkishore, Gowri, and Maha. The main content area displays a list of "Jewel Customers" with columns for Name, Status, and Actions. Buttons for "New", "Import", "Change Owner", and "Assign Label" are visible at the top right.

The screenshot shows a web browser window with multiple tabs open. The active tab is titled "Billing-01 | Billing". The page displays a "Billing" record with the ID "Billing-01". The "Details" tab is selected, showing various fields: Billing Name (Billing-01), Item (Item-01), Ornament (Necklace), Stone Weight (10.00), Weight (40.00), Owner (Maha Team SSGS), Created By (Maha Team SSGS, 26/02/2025, 4:42 pm), Amount (₹3,20,000.00), Gold/Silver Price (₹8,000.00), KDM Charge (₹32,000), Making Charges (₹15,000.00), Stones/Other Price (₹10,000.00), and Total Amount (₹3,77,000). The last modified by field also shows the same information. Navigation buttons for "New Contact", "Edit", and "New Opportunity" are at the top right.

Screenshot of a web browser showing a Salesforce Lightning interface for a Jewelry Inventory system.

The browser tabs include: Document 1.doc, Recently Viewed, Email Notifications, Email Notifications, Smartinternz, Smartinternz, and (37) demo video.

The main page title is "ssgsdegreecollege-cd-dev-ed.lightning.force.com/lightning/o/Price__c/list?filterName=_Recent".

The page header includes a search bar, a star icon, a refresh icon, a notification bell with 2 notifications, and a user profile icon.

The navigation bar shows "Jewellery Inventory ..." and "Prices".

The main content area displays a "Recently Viewed" list:

	Price Name	Actions
1	Price -02	[Edit] [Delete]
2	Price -01	[Edit] [Delete]

Buttons at the top right of the list area include: New, Import, Change Owner, and Assign Label.

The bottom status bar shows weather information (32°C, Mostly clear), a search bar, and system status indicators (ENG IN, battery level, date: 28-02-2025, time: 19:46).

(c). 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.

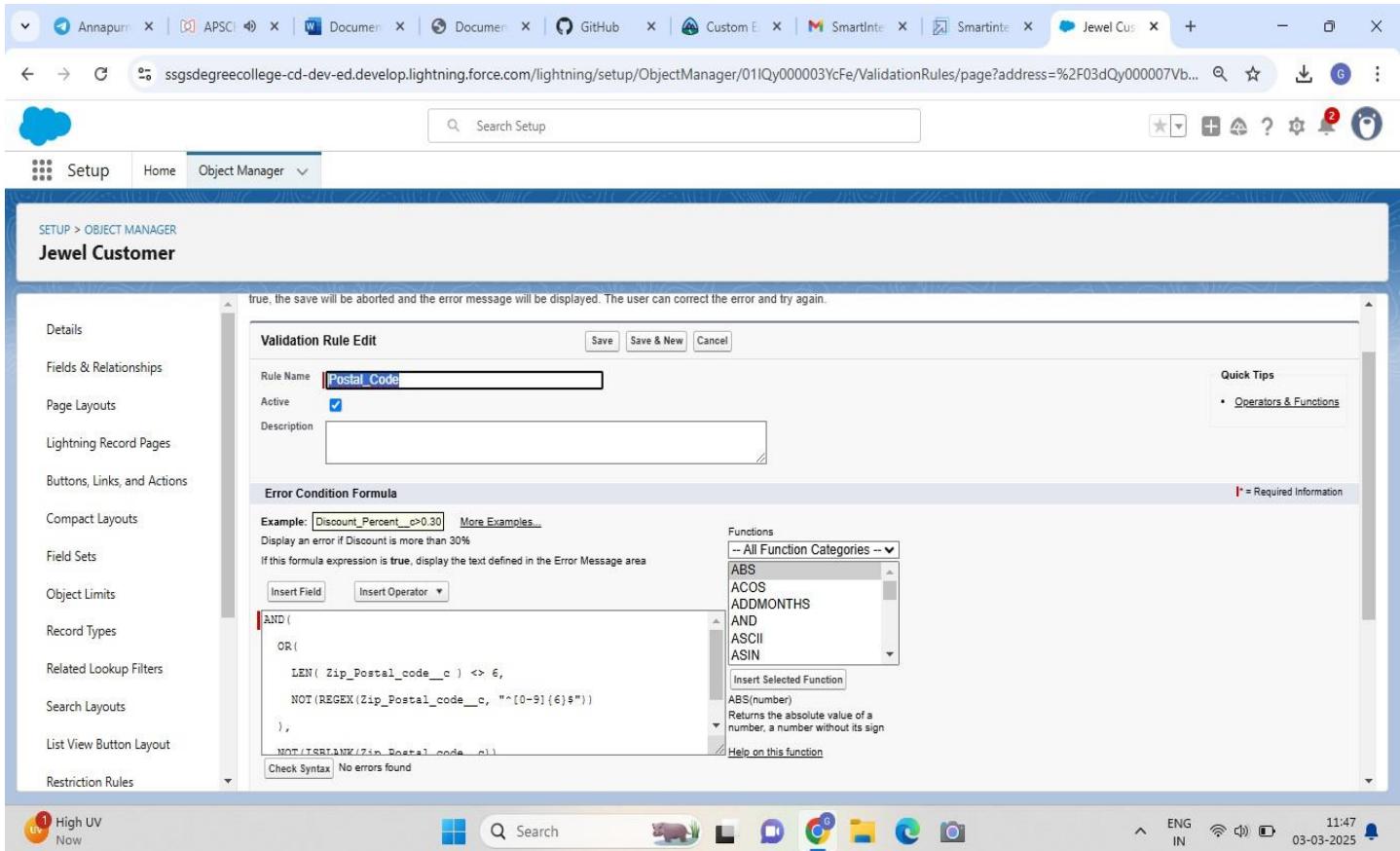
Validation Rules:-

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 Salesforce Object Manager interface. A validation rule is being edited for the 'Jewel Customer' object. The validation rule name is 'ValidationRule_For_JewelCustomerObject'. The error condition formula is set to `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))`. The formula editor dropdown lists various functions such as ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc.

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:

```
OR( ISBLANK( Amount_c ), ISBLANK( Customer_Name_c ), ISBLANK( Gold_Price_c ), ISBLANK( KOM_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 ) )
```

Functions:

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

Quick Tips: Operators & Functions

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

Check Syntax: No errors found

Jewellery 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 containing links like 'Jewellery Inventory ...', 'Reports', 'Maha | Jewel...', 'Item-01 | Item', 'Price -01 | Pr...', 'Customer Or...', 'Billing-01 | B...', 'Maha Team ...', 'Prices Report', and various icons for search, filters, and help.

The main content area displays a table titled 'Item-01' with two tabs: 'Related' and 'Details'. The 'Details' tab is selected, showing the following data:

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

The URL at the bottom of the page is: <https://ssosdeereecolleoe-cd-dev-ed.develop.liahtnina.force.com/liahtnina/r/Item/c/a01Ov00000tE952IAK/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

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

Jewel Customer
Maha

Related Details

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

Search...

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

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

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" on the "Billing" object. The "Fields & Relationships" tab is selected. The formula editor is open, showing the expression:

```
Amount_c + KDM_Charge_c + Stones_other_price_c + Making_Charges_c
```

The formula builder interface includes a "Decimal Places" dropdown set to 0, a note about checking syntax, and a "Check Syntax" button at the bottom which reports "No syntax errors in merge fields or functions. (Compiled size: 1,172 characters)". A "Functions" sidebar on the right lists various mathematical and logical functions like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc.

(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

