

CRM APPLICATION FOR JEWEL MANAGEMENT - ADMIN

By- Nallu Sai

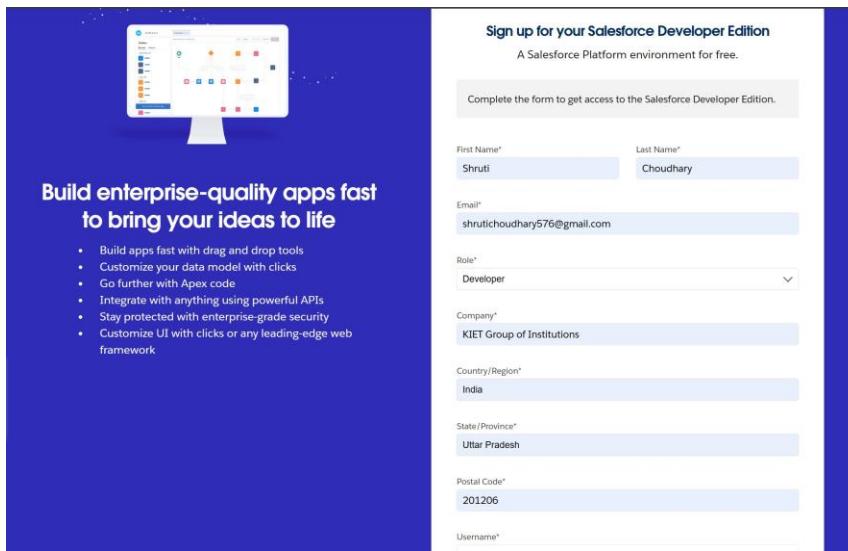
The CRM Application for Jewel Management is a comprehensive Salesforce-based solution designed to streamline inventory management and sales operations for jewellery stores. The project involved the creation of a custom application that efficiently tracks and manages over 200 jewellery items across five distinct categories.

Key features include the customization of over 10 objects, 3 user roles, and 5 profiles to ensure precise data management and user access control. Additionally, the project implemented 4 automated workflows that enhance operational efficiency by reducing manual intervention in critical business processes such as order tracking, inventory updates, and sales reports.

The application also integrates dashboards and reports that provide store owners with real-time insights into their inventory and sales performance. By leveraging Salesforce's robust customization and automation capabilities, this project offers a scalable, user-friendly solution tailored to the needs of jewellery businesses.

Task 1. Salesforce

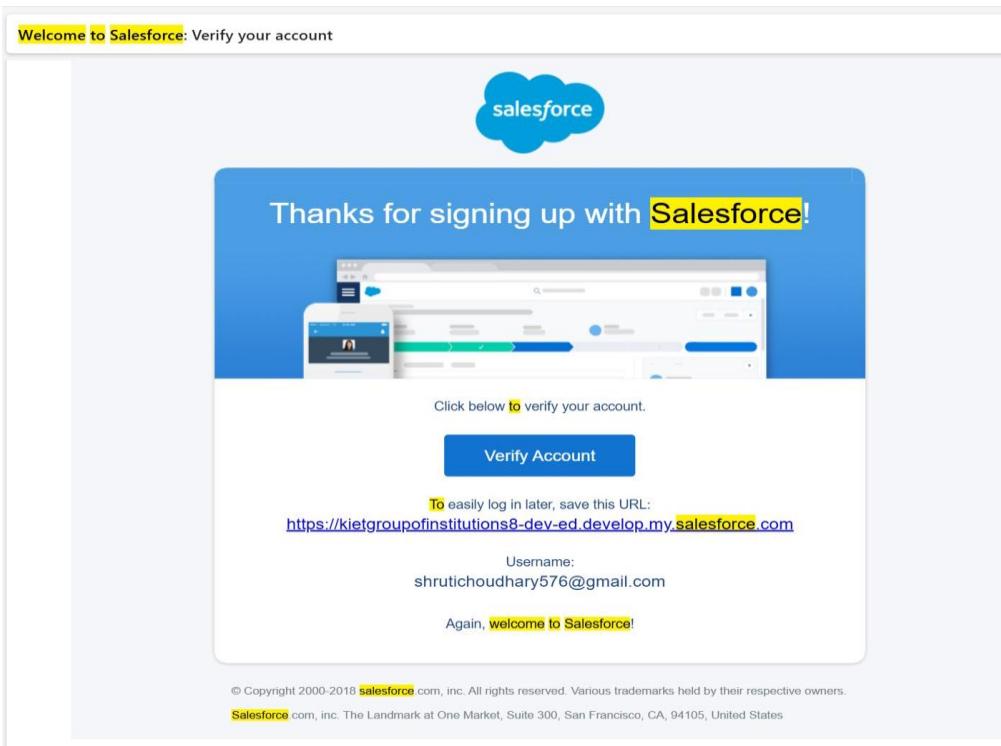
● Creating Developer Account



The screenshot shows the 'Sign up for your Salesforce Developer Edition' page. The page has a dark blue header and footer. The main content area is white with a light gray border. At the top, it says 'Sign up for your Salesforce Developer Edition' and 'A Salesforce Platform environment for free.' Below that is a sub-instruction: 'Complete the form to get access to the Salesforce Developer Edition.' The form fields are as follows:

First Name*	Last Name*
Shruti	Choudhary
Email*	shrutichoudhary576@gmail.com
Role*	Developer
Company*	KIET Group of Institutions
Country/Region*	India
State/Province*	Uttar Pradesh
Postal Code*	201206
Username*	[Field is empty]

● Account Activation



Task 2. Object

- Create Jewel Customer Object

Setup > OBJECT MANAGER

Jewel Customer

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: Jewel Customer **Example:** Account

Plural Label: Jewel Customers **Example:** Accounts

Starts with vowel sound:

Description:

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window
 Open a window using a Visualforce page

Content Name: None

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Customer name **Example:** Account Name

● Create Item Object

The screenshot shows the 'Edit Custom Object' page for the 'Item' object. The left sidebar lists various configuration options under 'Details'. The main form contains fields for 'Custom Object Information' (Label: 'Item', Plural Label: 'Items'), 'Object Name' (set to 'Item'), and 'Description'. Under 'Enter Record Name Label and Format', it specifies 'Record Name' as 'Item Id'. A note states: 'The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.' Below this are three rows of object mappings:

Customer Order	Customer_Order__c	Custom Object	28/07/2024	✓
Billing	Billing__c	Custom Object	28/07/2024	✓
Price	Price__c	Custom Object	29/07/2024	✓

Task 3. Tabs

● Creating a Custom Tab

The screenshot shows the 'Custom Object Tabs' section for the 'Item' object. It includes a 'New' button and a 'What Is This?' link. The table lists tabs with their actions and labels:

Action	Label	Tab Style	Description
Edit Del	Billings	Camera	
Edit Del	Customer Orders	Chess piece	
Edit Del	Items	Bell	
Edit Del	Jewel Customers	Fan	
Edit Del	Prices	Chip	

Task 4. The Lightning App

● Creating a Lightning App

The screenshot shows the 'Lightning Experience App Manager' page within the Salesforce Setup interface. The left sidebar includes links for 'Salesforce Mobile App', 'Data', 'Apps' (with 'App Manager' selected), and 'Connected Apps'. The main content area displays a table of 24 items, sorted by App Name. The columns include App Name, Developer Name, Description, Last Modified, App Type, and Version. Notable entries include 'Content' (Developer: Content, Type: Classic), 'Data Manager' (Developer: DataManager, Type: Lightning), 'Digital Experiences' (Developer: SalesforceCMS, Type: Lightning), 'Jewellery Inventory Syst...' (Developer: Jewellery_Inventory_Syst..., Type: Lightning), and 'Lightning Usage App' (Developer: LightningInstrumentation, Type: Lightning).

Task 5. Fields

● Creating a Lookup relationship

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

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

The screenshot shows the 'Fields & Relationships' page in the Salesforce Setup. The top navigation bar includes 'Quick Find', 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. The main table lists two fields: 'Created By' (Field Label: 'Created By', Field Name: 'CreatedBy', Data Type: 'Lookup(User)'), and 'Customer' (Field Label: 'Customer', Field Name: 'Customer__c', Data Type: 'Lookup(Jewel Customer)'). The 'Customer' field has a checkmark in the 'INDEXED' column.

● Creating a Master Detail Relationship

Creating Master-Detail Relationship between Item & Customer Order Object.

To Create a Master-Detail relationship :

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

Item	Item__c	Master-Detail(Item)	▼
Last Modified By	LastModifiedByld	Lookup(User)	▼
Order Status	Order_Status__c	Picklist	▼

• Creating Fields in Jewel Customer Object

1. City

Fields & Relationships 11 Items, Sorted by Field Label				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		▼

2. Phone

Phone	Phone__c	Phone	▼
State	State__c	Text(20)	▼

3. Email

Email	Email__c	Email	▼
Last Modified By	LastModifiedByld	Lookup(User)	

4. Order Status

Customer Order

Fields & Relationships

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

Picklist Options

Restrict picklist to the values defined in the value set ✓
Controlling Field [New]

Picklist Values Used

Active and inactive picklist values 5 (1,000 max)

Field Dependencies

No dependencies defined.

Validation Rules

No validation rules defined.

Values

Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> Edit Del Deactivate	Started	Started	<input type="checkbox"/>	Assigned dynamically	Shruti Choudhary, 27/07/2024, 11:57 pm
<input type="checkbox"/> Edit Del Deactivate	Not Started	Not Started	<input type="checkbox"/>	Assigned dynamically	Shruti Choudhary, 27/07/2024, 11:57 pm
<input type="checkbox"/> Edit Del Deactivate	On Hold	On Hold	<input type="checkbox"/>	Assigned dynamically	Shruti Choudhary, 27/07/2024, 11:57 pm
<input type="checkbox"/> Edit Del Deactivate	Completed	Completed	<input type="checkbox"/>	Assigned dynamically	Shruti Choudhary, 27/07/2024, 11:57 pm
<input type="checkbox"/> Edit Del Deactivate	Not Completed	Not Completed	<input type="checkbox"/>	Assigned dynamically	Shruti Choudhary, 27/07/2024, 11:57 pm

Inactive Values

Delete Unused Values Inactive Values Help ?

5. More fields

Object name	Fields
Jewel Customer	
Field Name	Data type
State	Text(20)
Street	Text(20)
Country	Text(18)
Zip/Postal code	Text(6)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City_c	Text(20)		▼
Country	Country_c	Text(18)		▼
State	State_c	Text(20)		▼
Street	Street_c	Text(20)		▼
Zip/Postal code	Zip_Postal_code_c	Text(6)		▼

• Creating Fields in Item Object

1. Number Field

Purity	Purity_c	Number(2, 0)	▼
Purity Gold Price	Purity_Gold_Price_c	Formula (Currency)	▼

2. Picklist Field

Fields & Relationships			Quick Find	New	Deleted Fields	Field Dependencies	Set History Tracking
Item type	Item_type_c	Picklist	▼				
KDM	KDM_c	Formula (Currency)	▼				

Item Custom Field
Item type
Back to Item

Custom Field Definition Detail

Field information

Field Label	Item type
Field Name	Item_type
API Name	Item_type_c
Description	Help Text
Data Owner	Field Usage
Data Sensitivity Level	Compliance Categorization
Created By	Shruti Choudhary, 27/07/2024, 10:23 pm
Modified By	Shruti Choudhary, 27/07/2024, 10:23 pm

Validation Rules [0]

Edit | Set Field-Level Security | View Field Accessibility | Where is this used?

Object Name: Item
Data Type: Picklist

General Options

- Required:
- Default Value:

Picklist Options

- Restrict picklist to the values defined in the value set:
- Controlling Field:

Picklist Values Used

Active and inactive picklist values: 2 (1,000 max)

Field Dependencies

No dependencies defined.

Validation Rules

No validation rules defined.

Values

Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> Edit Del Deactivate	Gold	Gold	<input type="checkbox"/> Assigned dynamically	<input type="checkbox"/>	Shruti Choudhary, 27/07/2024, 10:23 pm
<input type="checkbox"/> Edit Del Deactivate	Silver	Silver	<input type="checkbox"/> Assigned dynamically	<input type="checkbox"/>	Shruti Choudhary, 27/07/2024, 10:23 pm

New | Reorder | Replace | Printable View | Chart Colors | Delete Selected | Deactivate Selected | Replace Selected

Validation Rules Help ?

Values Help ?

3. Formula Field

Gold Price	Gold_Price__c	Formula (Currency)

Item Custom Field
Gold Price

Help for this Page 

[Back to Item](#)

Custom Field Definition Detail

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label Gold Price

Object Name [Item](#)

Field Name Gold_Price

API Name Gold_Price__c

Description

Help Text

Data Owner

Field Usage

Data Sensitivity Level

Compliance Categorization

Created By [Shruti Choudhary](#), 29/07/2024, 6:37 pm

Modified By [Shruti Choudhary](#), 29/07/2024, 6:37 pm

Formula Options

Data Type Formula 

Decimal Places 2

Prices__r.Gold_price__c / 10

Field Label:Customer Name

Lookup Relationship with Jewel Customer Object

Ornament

Text(20)

Weight

Number
(Length=8,Decimal=5)

Stone Weight

Number
(Length=5,Decimal=5)

Percentage

Number
(Length=2,Decimal=0)

Stone/Other Price

Currency
(Length=8,Decimal=2)

Expected Days Of Return

Picklist

- 1-3 Days
- 4-5 Days
- 6-7 Days
- 8-10 Days

Priority

Picklist

- Low
- Medium
- High
- Critical

Silver Price	<p>Formula (Return Type:Number) (Decimal=3)</p> <hr/> $(\text{Prices_r.Silver_price_c} / 1000)$
Purity Gold Price	<p>Formula (Return Type:Currency) (Decimal=2)</p> <hr/> $((\text{Prices_r.Gold_price_c} * \text{Purity_c}) / 24) / 10$
Total Weight	<p>Formula (Return Type:Number) (Decimal=3)</p> <hr/> $(\text{Weight_c} - \text{Stone_weight_c})$
Amount	<p>Formula (Return Type:Currency) (Decimal=3)</p> <hr/> $\text{IF}(\text{ISPICKVAL}(\text{Item_Type_c}, "Gold"), \text{Total_weight_c} * \text{Purity_Gold_price_c}$
KDM	<p>Formula (Return Type:Currency) (Decimal=0)</p> <hr/> $(\text{Amount_c} * \text{Percentage_c}) / 100$
Making Charges	<p>Formula (Return Type:Currency) (Decimal=0)</p> <hr/> $\text{IF}(\text{ISPICKVAL}(\text{Item_Type_c}, "Gold"), \text{Weight_c} * 300, \text{Weight_c} * 10)$

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Customer Name	Customer_Name_c	Lookup/Jewel Customer		✓
Expected Days Of Return	Expected_Days_of_Return_c	Picklist	Priority	
Gold Price	Gold_Price_c	Formula (Currency)		
Item Id	Name	Auto Number		✓
Item type	Item_type_c	Picklist		
KDM	KDM_c	Formula (Currency)		
Last Modified By	LastModifiedById	Lookup(User)		
Making Charges	Making_Charges_c	Formula (Currency)		

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Ornament	Ornament_c	Text(20)		
Owner	OwnerId	Lookup(User,Group)		✓
Percentage	Percentage_c	Number(2, 0)		
Prices	Prices_c	Lookup(Price)		✓
Priority	Priority_c	Picklist		
Purity	Purity_c	Number(2, 0)		
Purity Gold Price	Purity_Gold_Price_c	Formula (Currency)		
Record Type	RecordTypeId	Record Type		✓
Silver Price	Silver_Price_c	Formula (Number)		
Stone Weight	Stone_Weight_c	Number(5, 5)		
Stone/Other Price	Stone_Other_Price_c	Currency(8, 2)		

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Total Weight	Total_Weight_c	Formula (Number)		
Weight	Weight_c	Number(8, 5)		

● Creating Field in Price Object

1. Currency Field

Label	API Name	Type	Description	Last Modified	Deployed
Cart Item Price Adjustment	CartItemPriceAdjustment	Standard Object			
Price	Price__c	Custom Object		29/07/2024	✓

2. Silver Price

Fields & Relationships		Quick Find	New	Deleted Fields	Field Dependencies	Set History Tracking
Details	Fields & Relationships	6 Items, Sorted by Field Label				
Page Layouts	Created By	CreatedById	Lookup(User)			
Lightning Record Pages	Gold price	Gold_price__c	Currency(8, 5)			
Buttons, Links, and Actions	Last Modified By	LastModifiedById	Lookup(User)			
Compact Layouts	Owner	OwnerId	Lookup(User,Group)		✓	
Field Sets	Price	Name	Auto Number		✓	
Object Limits	Silver Price	Silver_Price__c	Currency(8, 5)			
Record Types						

- Creating Field in Billing Object

-----Task to be done

Field Label:Item	Lookup Relationship with Item Object		
Ornament	Formula (Return Type:Text)		
	Item__r.Ornament__c	KDM Charge	Formula (Return Type:Currency) (Decimal=0)
Stone weight	Formula (Return Type:Number) (Decimal=2)		Item__r.KDM__c
	Item__r.Stone_weight__c	Making Charges	Formula (Return Type:Currency) (Decimal=2)
Weight	Formula Return Type:Number (Decimal=2)		Item__r.Making_Charges__c
	Item__r.Total_weight__c	Stones/other price	Formula (Return Type:Currency) (Decimal=2)
Amount	Formula (Return Type:Currency) (Decimal=2)		Item__r.Stone_other_price__c
	Item__r.Amount__c	Total Amount	Formula (Return Type:Currency) (Decimal=0)
Gold/Silver Price	Formula (Return Type:Currency)		Amount__c + KDM_Charge__c + Stones_other_price__c + Making_Charges__c

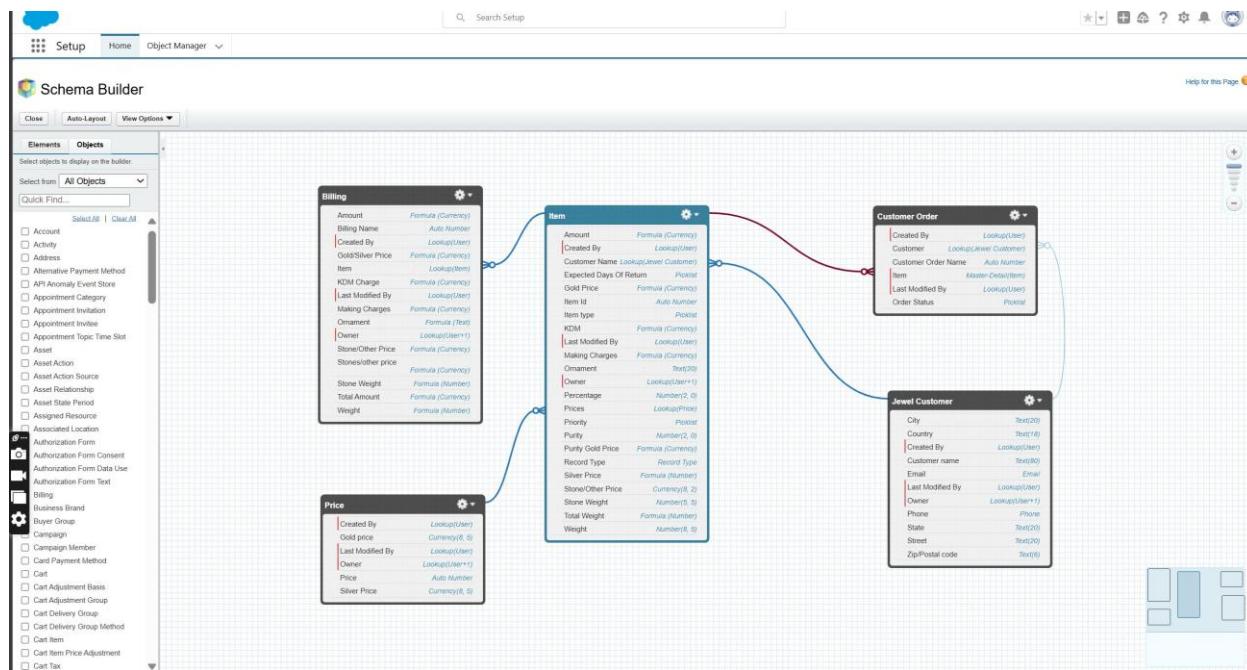
SETUP > OBJECT MANAGER
Billing

Fields & Relationships
15 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)		✓
Stone Weight	Stone_Weight_c	Formula (Number)		

Related Lookup Filters	Stone Weight	Stone_Weight_c	Formula (Number)
Search Layouts	Stone/Other Price	Stone_Other_Price_c	Formula (Currency)
List View Button Layout	Stones/other price	Stones_other_price_c	Formula (Currency)
Restriction Rules	Total Amount	Total_Amount_c	Formula (Currency)
Scoping Rules	Weight	Weight_c	Formula (Number)
Triggers			
Flow Triggers			

Schema Builder



• Creating the Field dependencies

Step 1

The screenshot shows the Salesforce Object Manager with the 'Item' object selected. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main content area is titled 'Fields & Relationships' and displays four field definitions:

Field Name	Label	Type
Owner	OwnerId	Lookup(User,Group)
Percentage	Percentage__c	Number(2, 0)
Prices	Prices__c	Lookup(Price)
Priority	Priority__c	Picklist

Step 2

The screenshot shows the 'Fields & Relationships' section for the 'Item' object. Under 'Field Dependencies', there is one entry:

Action	Dependent Field	Data Type	Modified By
Edit Del	Expected Days Of Return	Picklist	Shruti Choudhary, 28/07/2024, 1:05 am

• Creating the Validation rules

The screenshot shows the 'Validation Rules' page for the 'Jewel Customer' object. The sidebar includes categories like Details, Fields & Relationships, and Page Layouts. The main table lists two validation rules:

Rule Name	Error Location	Error Message	Active	Modified By
Postal_Code	Zip/Postal code	Must contain 6 digits	✓	Shruti Choudhary, 28/07/2024, 1:09 am
ValidationRule_For_JewelCustomerObject	Top of Page	Please fill Required fields	✓	Shruti Choudhary, 29/07/2024, 6:57 pm

Task 6. Profiles

● Creating Goldsmith Profile

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The page title is 'SETUP Profiles'. A search bar at the top left contains 'profiles'. Below it, a sidebar on the left shows 'Users' and 'Profiles' under the 'Profiles' section, with 'Profiles' being the active tab. A message says 'Didn't find what you're looking for? Try using Global Search.' The main content area displays a table titled 'Profiles' with one row:

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Gold Partner User	Gold Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Gold Smith	Salesforce	<input checked="" type="checkbox"/>

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The page title is 'SETUP Profiles'. A search bar at the top left contains 'profiles'. Below it, a sidebar on the left shows 'Users' and 'Profiles' under the 'Profiles' section, with 'Profiles' being the active tab. A message says 'Didn't find what you're looking for? Try using Global Search.' The main content area displays the 'Profile Detail' for 'Gold Smith':

Name	Gold Smith	User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description		Created By	Shruti Choudhary, 28/07/2024, 1:14 am	Modified By	Shruti Choudhary, 29/07/2024, 7:44 pm

Below the profile detail, there is a section titled 'Page Layouts' which lists various standard object layouts and their corresponding global or location group layouts.

● Creating Worker Profile

The top screenshot shows the 'Profiles' page in the Setup section. It lists profiles with columns for Action, Profile Name, User License, and Status. The bottom screenshot shows the 'Worker Profile' detail page, which includes sections for Profile Detail (Name, User License, Description, Created By, Modified By), Page Layouts (Standard Object Layouts and Alternative Payment Method Layouts), and various assignment sections like Lead, Location, and Object Milestone.

Task 7. Roles

- **Creating Goldsmith Role**

Setup Home Object Manager

roles

Users Roles

Feature Settings

Sales Contact Roles on Contracts Contact Roles on Opportunities

Service Case Teams Case Team Roles Contact Roles on Cases

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

SETUP Roles

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy View other sample Role Hierarchies: [Territory-based Sample](#)

```

graph TD
    CEO[CEO President] --> CFO[CFO VP Sales]
    CFO --> WesternSalesDir[Western Sales Director]
    CFO --> EasternSalesDir[Eastern Sales Director]
    WesternSalesDir --> WesternSalesRep1[Western Sales Rep]
    WesternSalesDir --> WesternSalesRep2[Western Sales Rep]
    EasternSalesDir --> EasternSalesRep1[Eastern Sales Rep]
    EasternSalesDir --> EasternSalesRep2[Eastern Sales Rep]
    InternationalSalesDir[International Sales Director] --> InternationalSalesRep1[International Sales Rep]
    InternationalSalesDir --> InternationalSalesRep2[International Sales Rep]
    
```

- Executive Staff**
 - CEO President**: * View & edit data, roll up forecasts, & generate reports for all users directly or at level 1.
 - CFO VP Sales**: * Can't access data of other Executive Staff
- Western Sales Director** (Director of W. Sales)
 - Western Sales Rep** (CA Sales Rep OR Sales Rep): * View & edit data, roll up forecasts, & generate reports for all users directly or at level 1.
 - Western Sales Rep** (NY Sales Rep MA Sales Rep): * View & edit data, roll up forecasts, & generate reports for all users directly or at level 1.
- Eastern Sales Director** (Director of E. Sales)
 - Eastern Sales Rep** (NY Sales Rep MA Sales Rep): * View & edit data, roll up forecasts, & generate reports for all users directly or at level 1.
- International Sales Director** (Director of Int'l Sales)
 - International Sales Rep** (Asian Sales Rep European Sales Rep): * View & edit data, roll up forecasts, & generate reports for all users directly or at level 1.

[Set Up Roles](#)

Don't show this page again

Setup Home Object Manager

roles

Users Roles

Feature Settings

Sales Contact Roles on Contracts Contact Roles on Opportunities

Service Case Teams Case Team Roles Contact Roles on Cases

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

SETUP Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

- KIET Group of Institutions**
 - CEO** Edit | Del | Assign
 - CFO** Edit | Del | Assign
 - COO** Edit | Del | Assign
 - Gold Smith** Edit | Del | Assign
 - Worker** Edit | Del | Assign
 - SVP.Customer Service & Support** Edit | Del | Assign
 - Customer Support, International** Edit | Del | Assign
 - Customer Support, North America** Edit | Del | Assign
 - Installation & Repair Services** Edit | Del | Assign
- SVP.Human Resources** Edit | Del | Assign
- SVP.Sales & Marketing** Edit | Del | Assign
 - VP.International Sales** Edit | Del | Assign
 - VP.Marketing** Edit | Del | Assign
 - Marketing Team** Edit | Del | Assign
- VP.North American Sales** Edit | Del | Assign
 - Director.Channel Sales** Edit | Del | Assign
 - Channel Sales Team** Edit | Del | Assign
 - Director.Direct Sales** Edit | Del | Assign
 - Eastern Sales Team** Edit | Del | Assign
 - Western Sales Team** Edit | Del | Assign

Gold Smith Role

Role Gold Smith

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: KIET Group of Institutions > CEO > Gold Smith
Sharing Groups: Role, Role and Internal Subordinates

Action	Full Name	Alias	Username	Active
Edit	Niklaus Mikaelson	nmika	nick783249@nick.nick	✓

Worker Role

Role Worker

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: KIET Group of Institutions > CEO > Gold Smith > Worker
Sharing Groups: Role, Role and Internal Subordinates

Action	Full Name	Alias	Username	Active
Edit	Kol Mikaelson	kmika	kol09368@ola.ola	✓
Edit	Zach Dempsey	zdemo	zachy@gmail.com	✓
Edit	Paxton Hall Yoshida	phall	paxton@gmail.com	✓

Task 8. Users

● Create User

Task to do:

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

User
Niklaus Mikaelson

Permission Set Assignments (0) | Permission Set Assignments: Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Apps (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0) | User Provisioning Accounts (0)

User Detail

		Edit	Sharing	Reset Password	Freeze	View Summary
Name	Niklaus Mikaelson					Role Gold Smith
Alias	nmika					User License Salesforce
Email	shrutichoudhary576@gmail.com [Verify]					Profile Gold Smith
Username	nick783249@nick.nick					Active <input checked="" type="checkbox"/>
Nickname	User17221100140482313394					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	Radhey Shyam Vihar phase 6 , Muradnagar (gzb) Ghaziabad 201206 Uttar Pradesh India					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"/>
Language	English					Mobile Push Registrations View
Delegated Approver						Data.com User Type [i]
Manager						Accessibility Mode (Classic Only) <input type="checkbox"/> [i]
Receive Approval Request Emails	Only if I am an approver					Debug Mode <input type="checkbox"/> [i]
Federation ID						High-Contrast Palette on Charts <input type="checkbox"/> [i]

1. Go to setup >> type users in quick find box >> select users >> click New user.

2. Fill in the fields

- First Name : Kol
- Last Name : Mikaelson
- Alias : Give a Alias Name
- Email id : Give your Personal Email id
- Username : Username should be in this form: text@text.text
- Nick Name : Give a Nickname
- Role : Worker
- User licence : Salesforce Platform
- Profiles : Worker

3. Save.

User
Kol Mikaelson

Permission Set Assignments (0) | Permission Set Assignments: Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Apps (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0) | User Provisioning Accounts (0)

User Detail

		Edit	Sharing	Reset Password	Freeze	View Summary
Name	Kol Mikaelson					Role Worker
Alias	kmika					User License Salesforce Platform
Email	shrutichoudhary576@gmail.com [Verify]					Profile Worker Profile
Username	kola9368@ola.ola					Active <input checked="" type="checkbox"/>
Nickname	User17221100140482313394					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	Ghaziabad 201206 Uttar Pradesh India					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"/>
Language	English					Mobile Push Registrations View
Delegated Approver						Data.com User Type [i]
Manager						Accessibility Mode (Classic Only) <input type="checkbox"/> [i]
Receive Approval Request Emails	Only if I am an approver					Debug Mode <input type="checkbox"/> [i]
Federation ID						High-Contrast Palette on Charts <input type="checkbox"/> [i]
App Registration: One-Time Password	[i]					Load Lightning Pages While Scrolling <input checked="" type="checkbox"/>

Two more Users

Manager ▾

User Detail

Zach Dempsey

Name: Zach Dempsey
Alias: zdemp
Email: shruti.nbilik@gmail.com [Verify] [\[i\]](#)
Username: zachy@gmail.com
Nickname: User17221102743467136204 [\[i\]](#)
Title:
Company:
Department:
Division:
Address: India
Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale: English (India)
Language: English
Delegated Approver: Manager [\[i\]](#)
Receive Approval Request Emails: Only if I am an approver
Federation ID: [\[i\]](#)
App Registration: One-Time Password Authenticator [\[i\]](#)
App Registration: Salesforce Authenticator [\[i\]](#)

Role: Worker
User License Profile: Salesforce Platform Worker Profile
Active:
Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
Site.com Publisher User:
WDC User:
Mobile Push Registrations: [View](#)
Data.com User Type: [View](#)
Accessibility Mode (Classic Only): [\[i\]](#)
Debug Mode: [\[i\]](#)
High-Contrast Palette on Charts: [\[i\]](#)
Load Lightning Pages While Scrolling: [\[i\]](#)
Salesforce CRM Content User:

Paxton Hall Yoshida

Name: Paxton Hall Yoshida
Alias: phall
Email: shruti.nbilik@gmail.com [Verify] [\[i\]](#)
Username: paxton@gmail.com
Nickname: User17hhjlo221102743467136204 [\[i\]](#)
Title:
Company:
Department:
Division:
Address: India
Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale: English (India)
Language: English
Delegated Approver: Manager [\[i\]](#)
Receive Approval Request Emails: Only if I am an approver
Federation ID: [\[i\]](#)
App Registration: One-Time Password Authenticator [\[i\]](#)
App Registration: Salesforce Authenticator [\[i\]](#)

Role: Worker
User License Profile: Salesforce Platform Worker Profile
Active:
Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
Site.com Publisher User:
WDC User:
Mobile Push Registrations: [View](#)
Data.com User Type: [View](#)
Accessibility Mode (Classic Only): [\[i\]](#)
Debug Mode: [\[i\]](#)
High-Contrast Palette on Charts: [\[i\]](#)
Load Lightning Pages While Scrolling: [\[i\]](#)
Salesforce CRM Content User:

Task 9. Page Layouts

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER Item

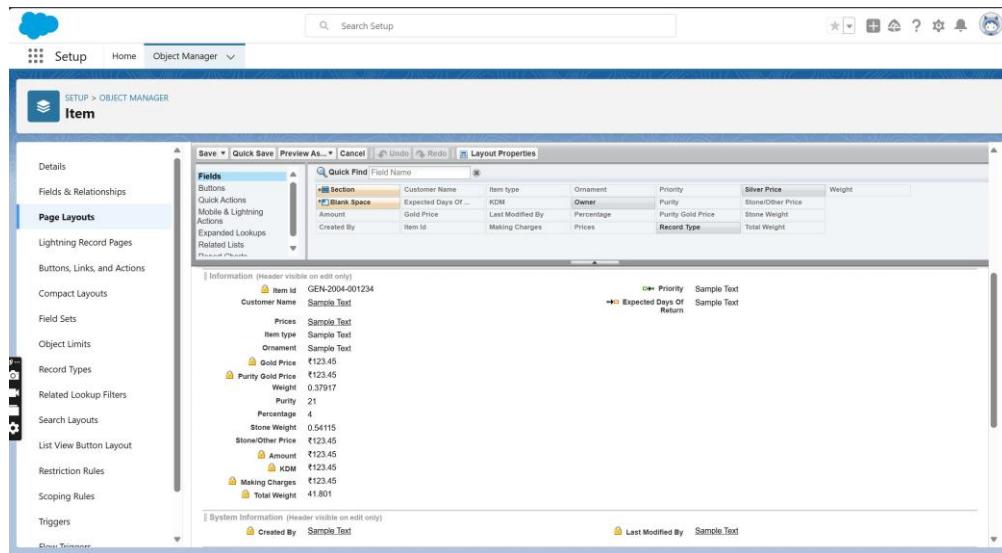
Page Layouts

J Items, Sorted by Page Layout Name

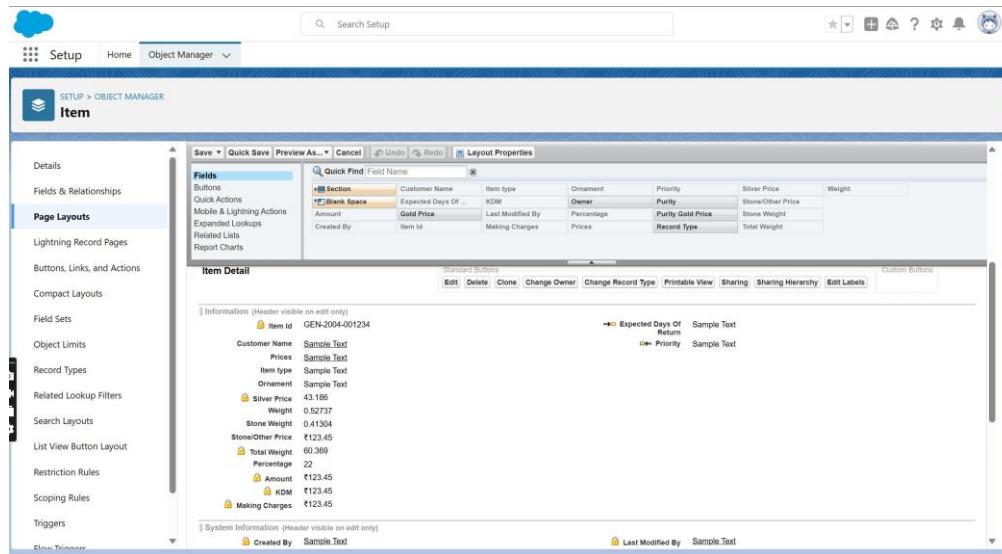
PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Item Layout	Shruti Choudhary, 27/07/2024, 9:24 pm	Shruti Choudhary, 29/07/2024, 6:45 pm
Page Layout for Gold	Shruti Choudhary, 28/07/2024, 1:31 am	Shruti Choudhary, 29/07/2024, 7:33 pm
Page Layout for Silver	Shruti Choudhary, 28/07/2024, 1:44 am	Shruti Choudhary, 29/07/2024, 7:39 pm

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
Triggers

● Create a Gold page layout



● Create a Silver page layout



Task 10. Record Types

Setup Home Object Manager

SETUP > OBJECT MANAGER Item

Record Types

2 Items, Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	Shruti Choudhary, 29/07/2024, 7:42 pm
Silver	Silver items information	✓	Shruti Choudhary, 29/07/2024, 7:44 pm

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters

SETUP > OBJECT MANAGER Item

Record Type Gold

Back to Custom Object: Item

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

Action	Field	Modified Date
Edit	Expected Days Of Return	28/07/2024, 1:40 am
Edit	Item type	28/07/2024, 1:40 am
Edit	Priority	28/07/2024, 1:40 am

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

SETUP > OBJECT MANAGER Item

Record Type Silver

Back to Custom Object: Item

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

Action	Field	Modified Date
Edit	Expected Days Of Return	29/07/2024, 7:44 pm
Edit	Item type	29/07/2024, 7:44 pm
Edit	Priority	29/07/2024, 7:44 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 Triggers

Task 11. Creating permission set

The image contains two screenshots of the Salesforce Setup interface, illustrating the process of creating a permission set.

Screenshot 1: Permission Sets Overview

This screenshot shows the "Permission Sets" page in the Setup menu. The sidebar on the left is collapsed. The main area displays a table of existing permission sets. One row is selected, showing details: "Per to Worker" (Permission Set Label), "Published Suggested for You Nudges; Integration User" (Description), and "Cloud Integration User" (License). Navigation links at the bottom include "New", "Edit", "Delete", and "Create New View". A help link "Help for this Page" is also present.

Action	Permission Set Label	Description	License
<input type="checkbox"/> Del Clone	Per to Worker	Published Suggested for You Nudges; Integration User	Cloud Integration User

Screenshot 2: Create New Permission Set

This screenshot shows the "Per to Worker" permission set being edited. The top navigation bar includes "Search Setup", "Home", and "Object Manager". The sidebar on the left shows "Users" and "Permission Sets" (which is selected). The main area displays the "Permission Set Per to Worker" configuration page. It includes sections for "Tab Settings", "Item: Record Type Assignments" (with a table showing "Gold" and "Silver" record types assigned to "Gold"), and "Object Permissions" (with a table listing permissions like Read, Create, Edit, Delete, View All, and Modify All, many of which are checked). Buttons for "Save" and "Cancel" are at the bottom right.

Task 12. User Adoption

- **Create a Record (Jewel Customer)**
- **View a Record(Jewel Customer)**
- **Delete a Record(Jewel Customer)**

Jewellery Inventory ... Jewel Customers

Recently Viewed ▾

9 items • Updated 11 minutes ago

	<input type="checkbox"/> Customer name
1	<input type="checkbox"/> Tokyo
2	<input type="checkbox"/> Dan Espinoza
3	<input type="checkbox"/> Lucifer Morningstar
4	<input type="checkbox"/> Ela
5	<input type="checkbox"/> nam
6	<input type="checkbox"/> shyam
7	<input type="checkbox"/> Ram
8	<input type="checkbox"/> radha
9	<input type="checkbox"/> Shruti

Task 13. Reports

Jewellery Inventory ... Reports

Reports Recent 2 items

REPORTS	Report Name	Folder	Created By	Created On
New Billings with Item F		Private Reports	Shruti Choudhary	29/7/2024, 7:48 pm
New Prices Report		Private Reports	Shruti Choudhary	28/7/2024, 2:33 am

FAVORITES All Favorites

Jewellery Inventory ... Reports Dashboard 1 Dashboard 1 Report Builder

REPORT ▾
New Prices Report **Prices**

Previewing a limited number of records. Run the report to see everything.

	Price: Price	Gold price	Price: ID
1	Item-02	₹10,00,000.0000	a05dM000005cMQX
2	Item-10	₹9,35,678.00000	a05dM000005cNGA
3	Item-01	₹53,000.00000	a05dM000005cPIg
4	Item-03	₹35,00,000.00000	a05dM000005cQxt
5	Item-08	₹9,73,462.00000	a05dM000005cQxu
6	Item-04	₹5,77,509.00000	a05dM000005cQzV
7	Item-05	₹63,468.00000	a05dM000005cR17
8	Item-06	₹63,42,873.00000	a05dM000005cR2j
9	Item-07	₹30,000.00000	a05dM000005cR4L
10	Item-09	₹34,687.00000	a05dM000005cR5x
11		₹1,35,10,677.00000	

Report: Prices
New Prices Report

Total Records Total Gold price
10 ₹1,35,10,677.00000

	Price: Price	Gold price	Price: ID
1	Item-02	₹10,00,000.00000	a05dM000005cMQX
2	Item-10	₹9,35,678.00000	a05dM000005cNGA
3	Item-01	₹53,000.00000	a05dM000005cPIg
4	Item-03	₹35,00,000.00000	a05dM000005cQxt
5	Item-08	₹9,73,462.00000	a05dM000005cQxu
6	Item-04	₹5,77,509.00000	a05dM000005cQzV
7	Item-05	₹63,468.00000	a05dM000005cR17
8	Item-06	₹63,42,873.00000	a05dM000005cR2j
9	Item-07	₹30,000.00000	a05dM000005cR4L
10	Item-09	₹34,687.00000	a05dM000005cR5x
11		₹1,35,10,677.00000	

Task 14. Creating Dashboards

The screenshot shows the Salesforce interface for creating a new dashboard. At the top, there's a blue header bar with a cloud icon, the text "Jewellery Inventory ...", and a "Dashboards" button. Below the header is a sidebar titled "Recent" which lists "1 item". The main area is titled "DASHBOARDS" and has a sub-section "Recent" which contains "Dashboard 1". To the right of "Dashboard 1", there's a vertical list of icons and names: "Jewel Customers", "Items", "Customer Orders", "Billings", "Reports", "Dashboards" (which is highlighted), and "Prices". At the bottom of this list is a "Edit" button.

The screenshot shows a dashboard titled "Dashboard 1". The top navigation bar includes a search bar, a "Dashboards" button, and tabs for "New Prices Report" and "Dashboard 1" (which is active). The dashboard content area contains two reports: "New Billings with Item Report" and "New Prices Report".

New Billings with Item Report

Billing: Billing Name ↑	Item: Item Id
Item-01	Item-10
Item-02	Item-09
Item-03	Item-08
Item-04	Item-07
Item-05	Item-06
Item-06	Item-10
Item-07	Item-09

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

New Prices Report

Price: Price ↑	Gold price	Price: ID
Item-01	₹53.00000k	a05dM0000005cP1g
Item-02	₹1.00000m	a05dM0000005cMQX
Item-03	₹3.50000m	a05dM0000005cQxt
Item-04	₹577.50900k	a05dM0000005cQzV
Item-05	₹63.46800k	a05dM0000005cR17
Item-06	₹6.34287M	a05dM0000005cR2j
Item-07	₹30.00000k	a05dM0000005cR4L

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

Task 15. Flows

The screenshot shows the Salesforce Setup Home page. On the left, there's a sidebar with a search bar and sections for Process Automation (Flows), Identity (Login Flows), and Global Search. The main area features a "Get Started with Einstein Bots" module with a cartoon character, a "Mobile Publisher" module with a smartphone icon, and a "Real-time Collaborative Docs" module with a document icon. Each module has a "Get Started" button.

This screenshot shows the "Flow Builder" interface with the "Select Type" dialog open. The "Recommended" section highlights the "Record-Triggered Flow" type, which is selected and outlined in blue. Other options shown include Screen Flow, Schedule-Triggered Flow, Autolaunched Flow (No Trigger), and Record-Triggered Orchestration. The "All Flow Types" section shows two more options: Autolaunched Flow (No Trigger) and Autolaunched Orchestration (No Trigger). A "Create" button is visible at the bottom right of the dialog.

This screenshot shows the "Flow Definitions" list view. It displays 43 items, sorted by Flow Label and filtered by All flow definitions, updated 2 minutes ago. The table includes columns for Flow Label, Process Type, A..., Te..., Package State, Pa..., Last Modifi..., and Last Modified The "Process Type" column shows various types like Autolaunched Flow, Screen Flow, and Salesforce Scheduler Flow. The "Package State" column indicates whether flows are Managed-Installed or Unmanaged. The "Last Modified By" column shows the name of the last modifier and the date and time (e.g., Shruti Choudha... 29/07/2024, 8:09 pm).

Flow Label	Process Type	A...	Te...	Package State	Pa...	Last Modifi...	Last Modified ...
Deploy Data Kit Component	Autolaunched Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Discount Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Enablement: Send Feedback Ready Notification	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Enroll or Unenroll Service Appointment Attendees	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Even Exchange Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Exchanges with RMA Returns	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Find Contact Associated with Messaging Session	Individual-Object Linking Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Flow Created	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged	Shruti Choudha...	29/07/2024, 8:09 pm	
Generate Appointment Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Generate Payment Link	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Inbound Cancel Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Inbound Modify Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Inbound New Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Inbound New Guest Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

*Object
 Billing

Configure Trigger

*Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated
- A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements
 None

[Cancel](#) [Done](#)

Configure Start

A record is created

A record is updated

 A record is created or updated

A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements
 None

*** Optimize the Flow for:**

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

[Cancel](#) [Done](#)

Edit Send Email

Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.

* Label	* API Name
notice	notice

Description

Send Email emailSimple-emailSimple

Set Input Values for the Selected Action

- Add Threading Token to Body Not Included
- Add Threading Token to Subject Not Included
- Body Included
Emailbody

Cancel **Done**

Flow Builder Flow Created - V2

Free-Form Version 2: Last modified a few seconds ago **Active** Run Debug View Tests Deactivate Save As Save

Toolbox

Elements Manager

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

Start Record-Triggered Flow

Object: Billing [Edit](#)

Trigger: A record is created or updated

Optimize for: Actions and Related Records

+ Add Scheduled Paths (Optional)

[Open Flow Trigger Explorer for Billing](#)

Run Immediately

Action notice

THANK YOU

