

College Name: Emerald Heights College For women

College Code: br u12

Team ID : NM2025TMID25140

Team members : 4

Team lead:

SAKTHI PRIYA R

Team members:

RAHILA FARATH S

REHANA A

SHAMLA NASRIN M

TITLE: CRM Application for Jewel

Management (Developer)



Project Overview.

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

Objectives:

1. Enhance Customer Relationship Management

Build stronger, long-term relationships with customers by maintaining detailed customer profiles and interactions.

2. Streamline Sales and Order Management

Optimize the sales process from inquiry to order fulfilment for increased efficiency and accuracy.

3. Improve Inventory and Product Management

Ensure efficient handling of jewellery inventory and product details.

4. Enable Targeted Marketing and Campaign Management

Increase customer engagement and sales through data-driven marketing.

5. Boost Operational Efficiency

Reduce manual tasks and errors through automation and integration.

6. Provide Business Insights and Analytics

Use data to support strategic decisions and identify business trends.

7. Support Omnichannel Customer Experience

Provide a seamless experience to customers across all touchpoints.

8. Ensure Data Security and Compliance

Protect sensitive customer and business data and ensure regulatory compliance.

Module: Salesforce

Activity 1: Creating Developer Account

Creating a developer org in salesforce.

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

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*

Last Name*

Email*

Role*

Company*

1. First name & Last name
2. Email
3. Role: Developer
4. Company: College Name
5. County: India
6. Postal Code: pin code
7. User name: should be a combination of your name and company

This need not be an actual email id, you can give anything in the format: user name@organization.com

Click on sign me up after filling these.

Activity 2: Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the Reset Password to activate your account. The email may take 5-10mins.
2. Click on Reset Password
3. Give a password and answer a security question and click on change password.

Change Your Password

Enter a new password for lead@sb.oom.
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

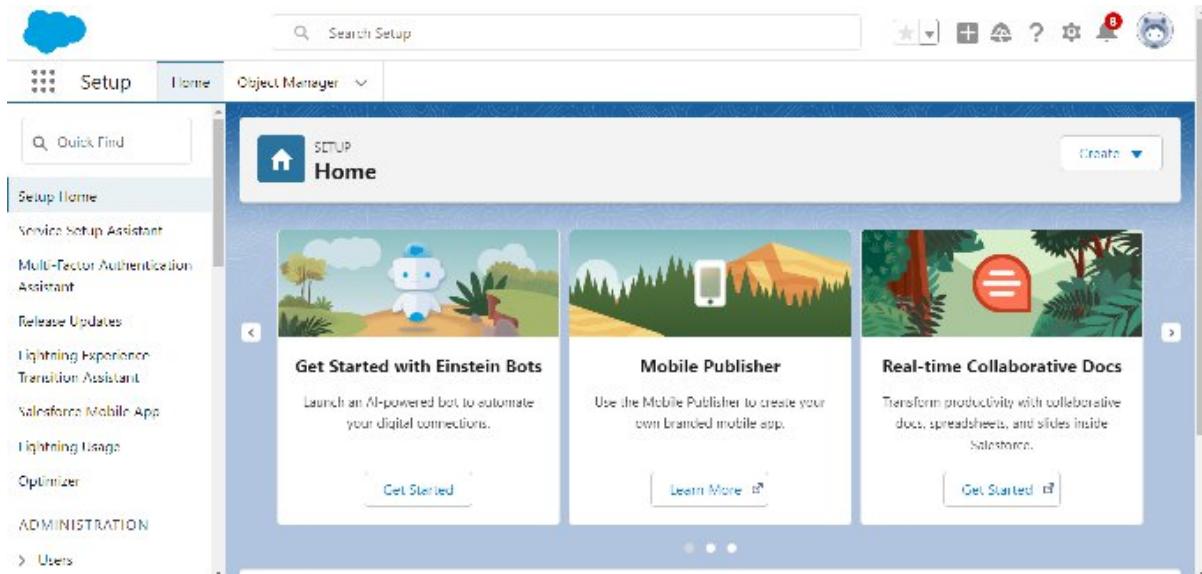
* Confirm New Password
..... Match

Security Question
In what city were you born?

* Answer
asdfghjkl

Change Password

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



The screenshot shows the Salesforce Setup Home page. The left sidebar is titled "Setup" and includes links for "Setup Home", "Service Setup Assistant", "Multi-Factor Authentication Assistant", "Release Updates", "Lightning Experience Transition Assistant", "Salesforce Mobile App", "Lightning Usage", "Optimizer", and "ADMINISTRATION". The main content area is titled "SETUP Home" and features three cards: "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative Docs". Each card has a "Get Started" button.

Module: Object

Activity 3: Create Jewel Customer Object

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

To create an object:

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

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER
Jewel Customer

Details

Details	
Fields & Relationships	Description
Page Layouts	API Name Jewel_Customer__c
Lightning Record Pages	Custom ✓
Buttons, Links, and Actions	Singular Label Jewel Customer
Compact Layouts	Plural Label Jewel Customers
Field Sets	Enable Reports ✓
Object Limits	Track Activities
Record Types	Track Field History
Related Lookup Filters	Deployment Status Deployed
Search Layouts	Help Settings Standard salesforce.com Help Window
List View Button Layout	
Restriction Rules	
Scoping Rules	
Object Access	
Triggers	
Flow Triggers	
Validation Rules	
Conditional Field Formatting	

Edit 1

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Details

Description

API Name
Item__c

Custom
✓

Singular Label
Item

Plural Label
Items

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

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

Setup | Home | Object Manager

Customer Order

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers
- Validation Rules
- Conditional Field Formatting

Details

Description

API Name: Customer_Order__c
Custom: ✓
Singular Label: Customer Order
Plural Label: Customer Orders

Enable Reports: ✓
Track Activities: ✓
Track Field History: ✓
Deployment Status: Deployed
Help Settings: Standard salesforce

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

Setup | Home | Object Manager

Price

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers
- Validation Rules
- Conditional Field Formatting

Details

Description

API Name: Price__c
Custom: ✓
Singular Label: Price
Plural Label: Prices

Enable Reports: ✓
Track Activities: ✓
Track Field History: ✓
Deployment Status: Deployed
Help Settings: Standard salesforce

Activity 4: Creating a Custom Tab

To create a Tab:(Customer)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external pages. Lightning Component tabs allow you to add Lightning components to the navigation bar. You can also allow users to add Lightning Pages to Lightning Experience and the mobile app.

The screenshot shows two sections of the Salesforce Setup interface:

- Custom Object Tabs:** A header says "Custom Object Tabs". Below it, a button labeled "New" is highlighted with a red box. A link "What Is This?" is also present. A message states "No Custom Object Tabs have been defined".
- Web Tabs:** A header says "Web Tabs". Below it, a button labeled "New" is highlighted with a red box. A link "What Is This?" is also present. A message states "No Web Tabs have been defined".

2. Select Object (Jewel Customer) >> Select any tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) keep it as default >> Save.

The screenshot shows the "New Custom Object Tab" setup wizard, Step 1 of 3:

- Step 1. Enter the Details:** A message says "Choose the custom object for the new custom tab. Fill in other details.".
- Select an existing custom object or create a new custom object now:**
 - Object:** A dropdown menu is open, showing "None" and "Jewel Customer". "Jewel Customer" is highlighted with a red box.
 - Tab Style:** A dropdown menu is open, showing "None" and "Jewel Customer". "None" is highlighted with a red box.
- (Optional) Assign a Home Page Custom Tab and Splash Page as a splash page the first time your user clicks on this tab:**
 - Splash Page Custom Link:** A dropdown menu is open, showing "None".
- Enter a short description:** A text input field labeled "Description" contains the placeholder "Jewel Customer".
- Next >** A "Next" button is visible at the bottom right.

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

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Breadcrumbs:** Shows "Setup" > "Customize" > "Custom Tabs".
- Section Header:** "Custom Tabs" with a "Help for this Page" link.
- Text:** "You can create new custom tabs to extend Salesforce functionality or to build new application functionality."
- Description:** "Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app."
- Table:** "Custom Object Tabs" table showing five entries:

Action	Label	Tab Style	Description
Edit Del	Billings	Laptop	
Edit Del	Customer Orders	Computer	
Edit Del	Items	Box	
Edit Del	Jewel Customers	Jewel	
Edit Del	Prices	Star	
- Section Header:** "Web Tabs" with "New" and "What Is This?" buttons.
- Text:** "No Web Tabs have been defined."
- Section Header:** "Visualforce Tabs" with "New" and "What Is This?" buttons.
- Text:** "No Visualforce Tabs have been defined."
- Section Header:** "Lightning Component Tabs" with "New" and "What Is This?" buttons.
- Text:** "No Lightning component tabs have been defined."
- Section Header:** "Lightning Page Tabs" with "New" and "What Is This?" buttons.
- Text:** "No Lightning Page Tabs have been defined."

Module: The Lightning App

Activity 5: Create a Lightning App

To create a lightning app page:

1. Go to setup page >> search "app manager" in quick find >> select "app manager" >>

2. click on new lightning App.

The screenshot shows the 'Lightning Experience App Manager' interface. At the top, there are tabs for 'Setup', 'Home', and 'Object Manager'. Below the tabs, there are two search bars: one for 'Search Setup' and another for 'Global Search'. A red box highlights the 'Global Search' bar. On the left, there's a sidebar with sections for 'Salesforce', 'Data', 'Apps', 'Custom', 'Lightning', and 'Mobile'. Under 'Apps', 'App Manager' and 'SalesMacade' are listed. A red box highlights 'App Manager'. In the center, there's a section titled 'Clone (App/Beta)' with a note about cloning existing apps. A red box highlights the 'Clone (App/Beta)' link. On the right, there are buttons for 'New Lightning App' and 'New Connected App', both highlighted with red boxes. Below these buttons is a note about enabling app cloning. The main area contains a table listing various apps, including 'All Tabs', 'Analytics Studio', 'App Launcher', 'Bolt Solutions', 'Chatter Desktop', 'Chatter Mobile for BlackBerry', 'College Management System', 'Community', 'Content', and 'Data Manager'. The table includes columns for 'App Name', 'Developer Name', 'Description', 'Last Modified', 'App Type', and 'VLR'.

3. Fill the app name in app details and branding as follow

App Name: Jewellery Inventory System.

Developer Name: This will auto generate

Description: Elevate your look with elegance

Image: optional (if you want to give any image you can otherwise not mandatory)

4. Primary colour hex value: keep this default.

The screenshot shows the 'New Lightning App' configuration dialog. On the left, there's a sidebar with sections for 'Salesforce', 'Data', 'Apps', 'Custom', 'Lightning', and 'Mobile'. Under 'Apps', 'App Manager' is selected. The main area has two tabs: 'App Details' and 'App Branding'. In 'App Details', the 'App Name' is set to 'Jewelry_Inventory_System', 'Developer Name' is set to 'Jewelry_Inventory_System', and 'Description' is set to 'Elevate your look with elegance'. In 'App Branding', there's a 'Primary Color-Hex Value' field containing '#0070C0', which is highlighted with a red box. There's also a 'Image' section with a 'Upload' button and a preview area showing a blue square with the letters 'JI'. A checkbox for 'Org Theme Options' is checked, with the note 'Use the app's image and color instead of the org's custom theme'. Below this is an 'App Launcher Preview' section showing a preview of the app card with the name 'Jewelry_Inventory_System' and the description 'Elevate your look with elegance'. At the bottom right of the dialog, there's a 'Next' button.

5. Then click Next >> (App option page) Set Navigation Style as Console

Navigation >> Next.

+

The screenshot shows the 'App Options' section of the Lightning App Builder settings. Under 'Navigation and Form Factor', the 'Navigation Style' is set to 'Console navigation' (radio button selected) and 'Supported form factors' is set to 'Desktop and phone' (radio button selected). Red arrows point to both of these selected options.

4. (Utility Items) keep it as default >> Next.

The screenshot shows the 'Clone Lightning App Jewellery Inventory System' page in the App Manager. It displays the 'App Details & Branding' section. The 'App Name' is 'Jewellery Inventory System_clone', 'Developer Name' is 'Jewellery_Inventory_System_clone', and the 'Description' is 'Elevate your look with elegance'. In the 'App Branding' section, there is an 'Image' preview of two gold rings, a 'Primary Color Hex Value' set to '#0070D2', and an 'Org Theme Options' checkbox. Below this is the 'App Launcher Preview' section, which shows a thumbnail of the rings and the app's name and description.

Module: Fields

Activity 6: Creating Lookup Relationship

A Lookup relationship is a type of relationship in Salesforce that connects two objects together based on a field known as the Lookup field. It establishes a relationship between a child object and a parent object, allowing the child object to reference the parent object.

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

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

- Setup** button is active.
- Object Manager** is selected under the **Customer Order** object.
- Fields** tab is selected.
- Fields** table:
 - 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



Search Setup

Object Manager			
Setup	Home	Object Manager 	
SETUP > OBJECT MANAGER			
Billing			
Details	Fields  Quick Find 16 Items, Sort by Field Name		
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE
Page Layouts	Amount	Amount__c	Formula (Currency)
Lightning Record Pages	Billing Name	Name	Auto Number
Buttons, Links, and Actions	Created By	CreatedById	Lookup(User)
Compact Layouts	Gold/Silver Price	Gold_Silver_Price__c	Formula (Currency)
Field Sets	Item	Item__c	Lookup(Item)
Object Limits	KDM Charge	KDM_Charge__c	Formula (Currency)
Record Types	Last Modified By	LastModifiedById	Lookup(User)
Related Lookup Filters	Making Charges	Making_Charges__c	Formula (Currency)
Search Layouts	Ornament	Ornament__c	Formula (Text)
List View Button Layout	Owner	OwnerId	Lookup(User,Group)
Restriction Rules	Paid Amount	Paid_Amount__c	Currency(18, 0)
Scoping Rules	Paying Amount	Paying_Amount__c	Currency(18, 0)
Object Access	Stone weight	Stone_weight__c	Formula (Number)
Triggers	Stones/other price	Stones_other_price__c	Formula (Currency)
Flow Triggers	Total Amount	Total_Amount__c	Formula (Currency)
Validation Rules	Weight	Weight__c	Formula (Number)
Conditional Field Formatting			

Activity 7: Creating the number field in Item object

Fields <small>Quick Find 23 Items, Some may have been removed</small>				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLS
Page Layouts	Amount	Amount__c	Formula (Currency)	
Lightning Record Pages	Created By	CreatedById	Lookup(User)	
Buttons, Links, and Actions	Customer Name	Customer_Name__c	Lookup(Jewel Customer)	
Compact Layouts	Expected Days Of Return	Expected_Days_Of_Return__c	Picklist	Priority
Field Sets	Gold Price	Gold_Price__c	Formula (Currency)	
Object Limits	Item Id	Name	Auto Number	
Record Types	Item Type	Item_Type__c	Picklist	
Related Lookup Filters	KDM	KDM__c	Formula (Currency)	
Search Layouts	Last Modified By	LastModifiedById	Lookup(User)	
List View Button Layout	Making Charges	Making_Charges__c	Formula (Currency)	
Restriction Rules	Ornament	Ornament__c	Text(20)	
Scoping Rules	Owner	OwnerId	Lookup(User,Group)	
Object Access	Percentage	Percentage__c	Number(2, 0)	
Triggers	Prices	Prices__c	Lookup(Price)	
Flow Triggers	Priority	Priority__c	Picklist	
Validation Rules	Purity	Purity__c	Number(2, 0)	
Conditional Field Formatting	Purity Gold Price	Purity_Gold_Price__c	Formula (Currency)	
	Record Type	RecordTypeId	Record Type	
	Silver Price	Silver_Price__c	Formula (Number)	
	Stone Weight	Stone_Weight__c	Number(5, 5)	
	Stone/Other Price	Stone_Other_Price__c	Currency(8, 2)	
	Total Weight	Total_Weight__c	Formula (Number)	
	Weight	Weight__c	Number(8, 5)	

Activity 8: Creating Text Field in Jewel Customer Object

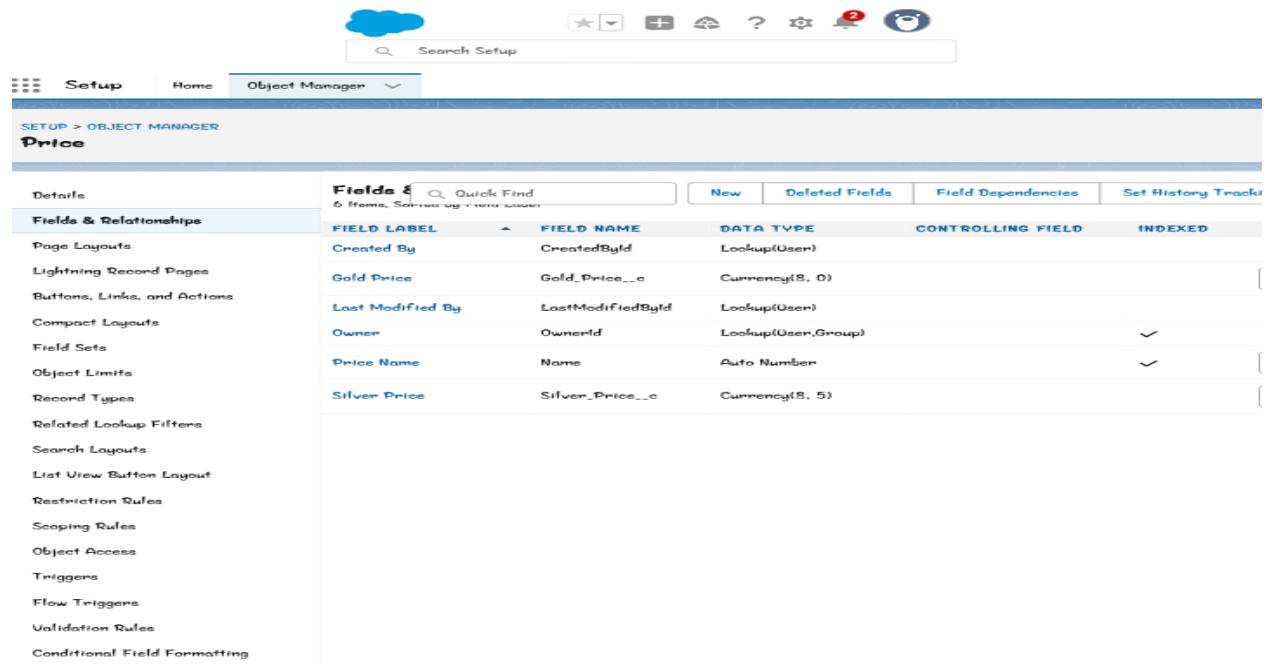
The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search Setup, Home, Object Manager.
- Breadcrumbs:** SETUP > OBJECT MANAGER **Jewel Customer**.
- Left sidebar (Details section):** Fields & Relationships, listing various configuration items like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, and Conditional Field Formatting.
- Table (Fields section):** Displays 11 items for the Jewel Customer object. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, and CONT.

FIELD LABEL	FIELD NAME	DATA TYPE	CONT
City	City_c	Text(20)	
Country	Country_c	Text(18)	
Created By	CreatedBy	Lookup(User)	
Customer Name	Name	Text(80)	
Email	Email_c	Email	
Last Modified By	LastModifiedBy	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)	

Activity 9: Creating Currency Field in Price Object

To create fields in an object:



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

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER
Price

Fields & Relationships

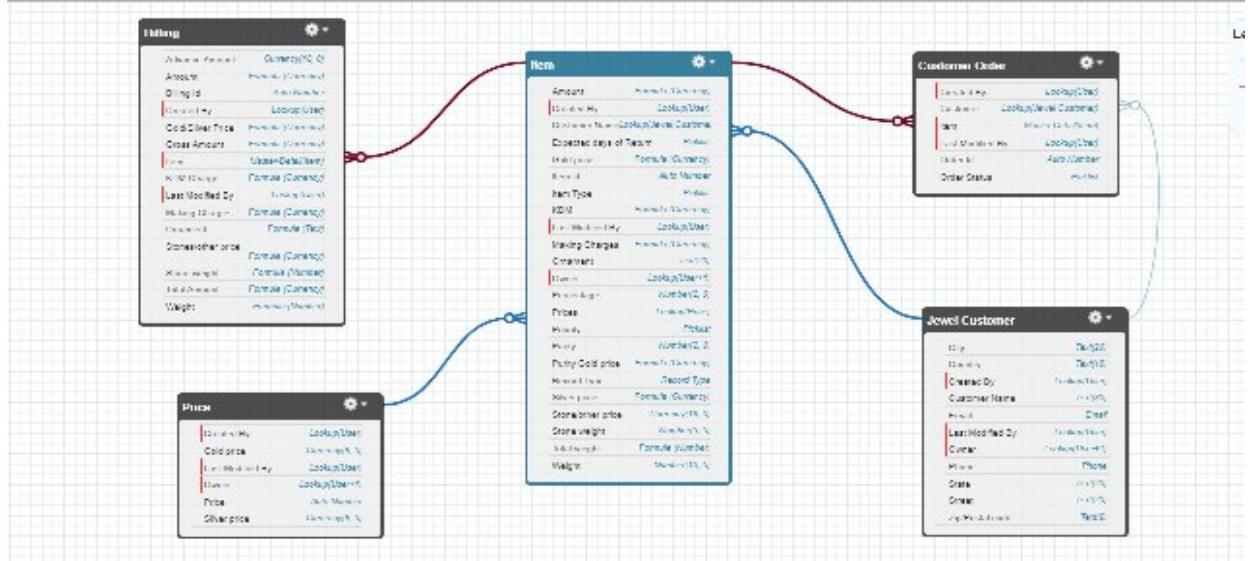
Details

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Gold Price	Gold_Price__c	Currency(\$, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)	✓	
Price Name	Name	Auto Number	✓	
Silver Price	Silver_Price__c	Currency(\$, 5)		

Activity 10: 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.

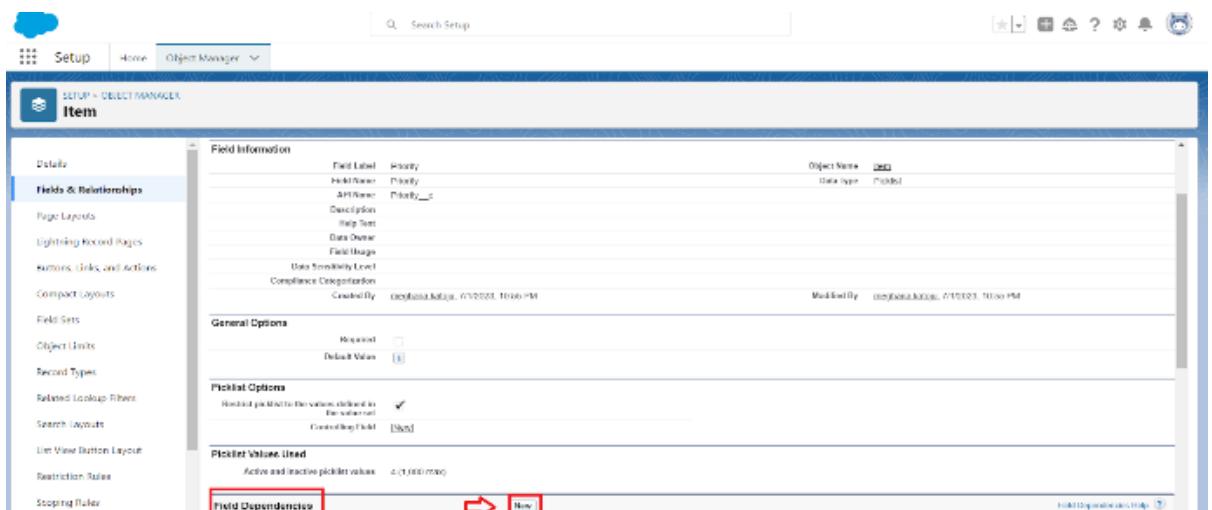


Activity 11: Creating the Field Dependencies

Use case:

Field Dependencies are used to create relationships between fields within an object. They allow you to control the visibility and availability of fields based on the values selected in other fields.

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Click on Fields & Relationships and click on the Priority field.
3. Search for Field Dependencies and click on New.



4. Select Controlling Field as “Priority” and Depending field as “Expected Days of Return” >> Continue.

New Field Dependency

[Help for this Page](#)

Create a dependent relationship that causes the values in a picklist or multi-select picklist to be dynamically filtered based on the value selected by the user in another field.
 • The field that drives filtering is called the “controlling field.” Standard and custom checkboxes and picklists with at least one and less than 300 values can be controlling fields.
 • The field that has its values filtered is called the “dependent field.” Custom picklists and multi-select picklists can be dependent fields.

Step 1. Select a controlling field and a dependent field. Click Continue when finished.

Step 2. On the following page, edit the filter rules that control the values that appear in the dependent field for each value in the controlling field.

		Continue	Cancel
Controlling Field	—None—		
Dependent Field	—None—		
<input type="button" value="Continue"/> <input type="button" value="Cancel"/>			

5. Select the “Expected Days of Return” values of related Priority values and Click on Include Values >> Save.

Activity 12: Creating the validation rule

Creating the validation rule for Postal Code field in Jewel Customer object

Note: check whether the fields mentioned in the formula field are created or not, if not go to activity 10 and create those fields mentioned in Jewel Customer object.

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

3. Enter the Rule name as "Postal Code".
4. Insert the Error Condition Formula as :-

AND(

OR(

LEN(Zip_Postal_code_c) <> 6, NOT(REGEX(Zip_Postal_code_c, "^[0-9]{6}\$"))),

NOT(ISBLANK(Zip_Postal_code_c))

)

)

Validation Rule Edit	
Rule Name	<input type="text" value="Postal Code"/>
Active	<input checked="" type="checkbox"/>
Description	<input type="text"/>
Error Condition Formula <small>Example: <input type="text" value="Discount_Percent_c>0.30"/> More Examples...</small> <small>If this formula expression is true, display the text defined in the Error Message area</small>	
<pre>AND(OR(LEN(Zip_Postal_code_c) <> 6, NOT(REGEX(Zip_Postal_code_c, "^[0-9]{6}\$"))), NOT(ISBLANK(Zip_Postal_code_c)))</pre>	
<input type="button" value="Check Syntax"/> <small>No errors found</small>	
Error Message <small>Example: <input type="text" value="Discount percent cannot exceed 30%"/></small> <small>This message will appear when Error Condition formula is true</small>	
Error Message <input type="text" value="Must contain 6 digits"/>	
<small>This error message can either appear at the top of the page or below a specific field on the page</small> Error Location <input type="radio"/> Top of Page <input checked="" type="radio"/> Field <input type="text" value="Zip/Postal code"/>	
<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="Cancel"/>	

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

NOTE:

Create One more Validation rule for Jewel Customer object.

- Enter Rule name as "ValidationRule For Jewel Customer Object".
- Insert the Error Condition Formula as :-

`OR(ISBLANK(City_c),
ISBLANK(Country_c),ISBLANK(Phone_c),ISBLANK(State_c),ISBLANK(Street_c))`

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

Create Validation rule for Item object.

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

`OR(ISBLANK(Amount_c), ISBLANK(Customer_Name_c),ISBLANK(Gold_price_c),ISBLANK(KDM_c),ISBLANK(Ornam ent_c),ISBLANK(Percentage_c),ISBLANK(Making_Charges_c),ISBLANK(Prices_c),ISBLANK(Stone_weight_c),ISBLANK(Silver_price_c),ISBLANK(Stone_other_p rice_c),ISBLANK(Stone_weight_c),ISBLANK(Weight_c))`

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

Module: Profiles

Activity 13: Gold Smith Profile

To create a new profile:

- Go to setup >> type profiles in quick find box >>click on profiles? clone the desired profile (System Administrator) >> enter profile name (Gold Smith) >> Save.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. A modal dialog titled 'Clone Profile' is open, asking for the 'Name of the new profile' (set to 'Gold Smith') and 'Select an existing profile to clone from' (set to 'System Administrator'). The sidebar on the left lists various setup categories like Release Updates, Lightning Experience Transition Assistant, and Administration.

- While still on the profile page, then click Edit.

3. Scroll down to Custom Object Permissions and Give access permissions for Jewel Customer, Item, Customer Order, Prices, Billings.

	Basic Actions	Read	Create	Edit	Delete	View All	Modify All
Asset	<input type="checkbox"/>						
Asset Services	<input type="checkbox"/>						
Utilities	<input checked="" type="checkbox"/>						
Book1	<input type="checkbox"/>						
Book2	<input type="checkbox"/>						
Unit Commands	<input type="checkbox"/>						
Roles	<input type="checkbox"/>						
Users	<input type="checkbox"/>						
Candidates	<input type="checkbox"/>						
Customer Order	<input checked="" type="checkbox"/>						

	Basic Actions	Read	Create	Edit	Delete	View All	Modify All
Book	<input checked="" type="checkbox"/>						
Jewel Customer	<input checked="" type="checkbox"/>						
Job Applications	<input type="checkbox"/>						
Job Postings	<input type="checkbox"/>						
Job Posting Sites	<input type="checkbox"/>						
Positions	<input type="checkbox"/>						
Prices	<input checked="" type="checkbox"/>						
Projects	<input type="checkbox"/>						
Project Tasks	<input type="checkbox"/>						
Properties	<input type="checkbox"/>						

4. Scroll down and Click on Save.

Profile
Gold Smith

Users with this profile have the permissions and page layouts below. Administrators can change a user's profile by editing user's personal information.

If your organization uses Record Types, use the Edit links in Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail

Name	Gold Smith	Edit	Clone	Delete	View Users
User License	Salesforce	Custom Profile ✓			
Description					
Created By	Sakthi Priya R.	8/31/2025, 3:58 AM	Modified By	Sakthi Priya R. 8/31/2025	

Page Layouts

Standard Object Layouts	Global	Location Group Assignment
Email Application	Global Layout (View Assignment)	Macro Layout (View Assignment)
Home Page Layout	Not Assigned (View Assignment)	Object Milestone Layout (View Assignment)
Account	Home Page Default (View Assignment)	Operating Hours Layout (View Assignment)
Alternative Payment Method	Account Layout (View Assignment)	Opportunity Layout (View Assignment)
Appointment Invitation	Alternative Payment Method Layout (View Assignment)	Opportunity Product Layout (View Assignment)
Asset	Appointment Invitation Layout (View Assignment)	Order Layout (View Assignment)
Asset Action	Asset Layout (View Assignment)	Order Product Layout (View Assignment)
Asset Action Source	Asset Action Layout (View Assignment)	Payment Layout (View Assignment)
Asset Relationship	Asset Action Source Layout (View Assignment)	Payment Authorization Layout (View Assignment)
Asset State Period	Asset Relationship Layout (View Assignment)	Payment Authorization Adjustment Layout (View Assignment)
Assigned Resource	Asset State Period Layout (View Assignment)	Payment Gateway Layout (View Assignment)
Associated Location	Assigned Resource Layout (View Assignment)	Payment Gateway Log Layout (View Assignment)
Async Operation Log	Associated Location Layout (View Assignment)	Payment Group Layout (View Assignment)
	Async Operation Log Layout (View Assignment)	

Activity 14: Worker Profile

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

Object Manager is selected in the sidebar.

Profiles is selected in the main navigation.

Standard Platform User is the current profile being viewed.

Description: Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

Record Type Settings: If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail:

Name	Standard Platform User
User License	Salesforce Platform
Created By	salesforce.com, Inc. 7/31/2025, 6:05 PM
Custom Profile	<input type="checkbox"/>
Modified By	Sakshi Priya R. 8/31/2025, 6:40 AM

Page Layouts: A large table listing Standard Object Layouts and their corresponding Global, Lead, Location, Location Group, Location Group Assignment, Object Milestone, Operating Hours, Order, Order Product, Payment, Payment Authorization, Payment Authorization Adjustment, Payment Gateway, Payment Gateway Log, Payment Group, Payment Line Invoice, Price Book, Price Book Entry, Process Exception, Product, Product Consumption Schedule, and Refund layouts.

Standard Object	Layout Type	Layout Name	Description
Global	Global Layout	(View Assignment)	Global Layout (View Assignment)
Email Application	Not Assigned	(View Assignment)	Location Layout (View Assignment)
Home Page Layout	Home Page Default	(View Assignment)	Location Group Layout (View Assignment)
Account	Account Layout	(View Assignment)	Location Group Assignment Layout (View Assignment)
Alternative Payment Method	Alternative Payment Method Layout	(View Assignment)	Object Milestone Layout (View Assignment)
Appointment Invitation	Appointment Invitation Layout	(View Assignment)	Operating Hours Layout (View Assignment)
Asset	Asset Layout	(View Assignment)	Order Layout (View Assignment)
Asset Relationship	Asset Relationship Layout	(View Assignment)	Order Product Layout (View Assignment)
Assigned Resource	Assigned Resource Layout	(View Assignment)	Payment Layout (View Assignment)
Associated Location	Associated Location Layout	(View Assignment)	Payment Authorization Layout (View Assignment)
Async Operation Log	Async Operation Log Layout	(View Assignment)	Payment Authorization Adjustment Layout (View Assignment)
Authorization Form	Authorization Form Layout	(View Assignment)	Payment Gateway Layout (View Assignment)
Authorization Form Consent	Authorization Form Consent Layout	(View Assignment)	Payment Gateway Log Layout (View Assignment)
Authorization Form Data Use	Authorization Form Data Use Layout	(View Assignment)	Payment Group Layout (View Assignment)
Authorization Form Text	Authorization Form Text Layout	(View Assignment)	Payment Line Invoice Layout (View Assignment)
Business Brand	Business Brand Layout	(View Assignment)	Price Book Layout (View Assignment)
Campaign Member	Campaign Member Page Layout	(View Assignment)	Price Book Entry Layout (View Assignment)
Card Payment Method	Card Payment Method Layout	(View Assignment)	Process Exception Layout (View Assignment)
Cart	Cart Layout	(View Assignment)	Product Layout (View Assignment)
Cart Adjustment Basis	Cart Adjustment Basis Layout	(View Assignment)	Product Consumption Schedule Layout (View Assignment)
Cart Adjustment Group	Cart Adjustment Group Layout	(View Assignment)	Refund Layout (View Assignment)

Module: Roles

Activity 15: Creating Gold Smith Role

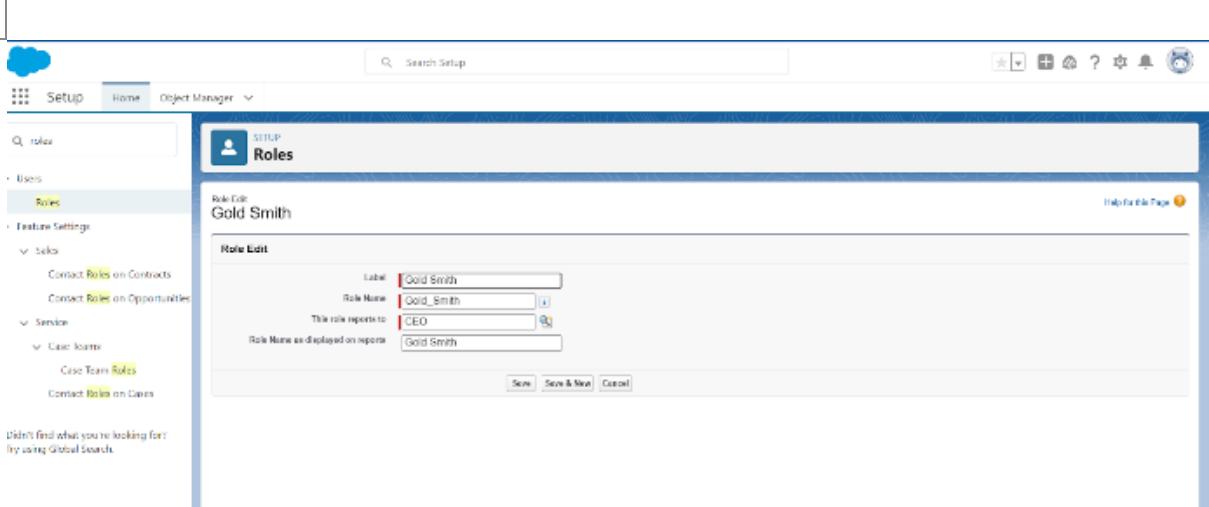
- From setup, go to quick find >> Search for Roles >> click on set up roles.

The screenshot shows the Salesforce Setup interface for managing Roles. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar is expanded, showing sections like 'Feature Settings', 'Users' (which is selected), 'Sobjects', 'Buttons & Forms', 'Custom Buttons', 'Custom Labels', and 'Contact Roles on Cases'. The main content area is titled 'Understanding Roles' and displays a 'Role Hierarchy' diagram. At the top of the hierarchy is 'Executive Staff', which branches down to 'Western Sales Rep', 'Eastern Sales Rep', 'International Sales Rep', and 'Sales Team Lead'. Each role is represented by a small icon of a person. Below the hierarchy, there are four boxes with detailed descriptions: 'Western Sales Rep' (Sales Lead, Sales Rep, Sales Rep), 'Eastern Sales Rep' (Sales Lead, Sales Rep, Sales Rep), 'International Sales Rep' (Sales Lead, Sales Rep, Sales Rep), and 'Sales Team Lead' (Sales Lead, Sales Rep, Sales Rep). A red box highlights the 'Executive Staff' role in the hierarchy. At the bottom right of the page, there is a red button labeled 'Set up Roles' and a checkbox for 'Don't show this page again'.

- Click on Expand All and click on add role under whom this role works.

The screenshot shows the 'Your Organization's Role Hierarchy' page. At the top, there is a 'Collapse All' and 'Expand All' button, with 'Expand All' highlighted with a red box. The main content area shows a hierarchical tree of roles under 'Nick Enterprises'. The 'CFO' node has an 'Edit | Del | Assign' button. The 'HR' node has an 'Edit | Del | Assign' button. The 'Manager' node has an 'Edit | Del | Assign' button and its own 'Add Role' button, which is also highlighted with a red box. The 'On Site Emp' and 'Remote Emp' nodes both have 'Edit | Del | Assign' buttons and their own 'Add Role' buttons, which are also highlighted with red boxes. The 'Add Role' buttons are located at the bottom of each node's list.

- Give Label as "Gold Smith" and Role name gets auto populated. Check to whom this role (Gold Smith) reports. Then click on Save.

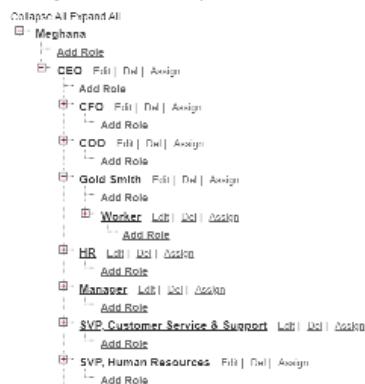


Activity 16: Create one more role as Worker which reports to Gold Smith

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



Help for this Page

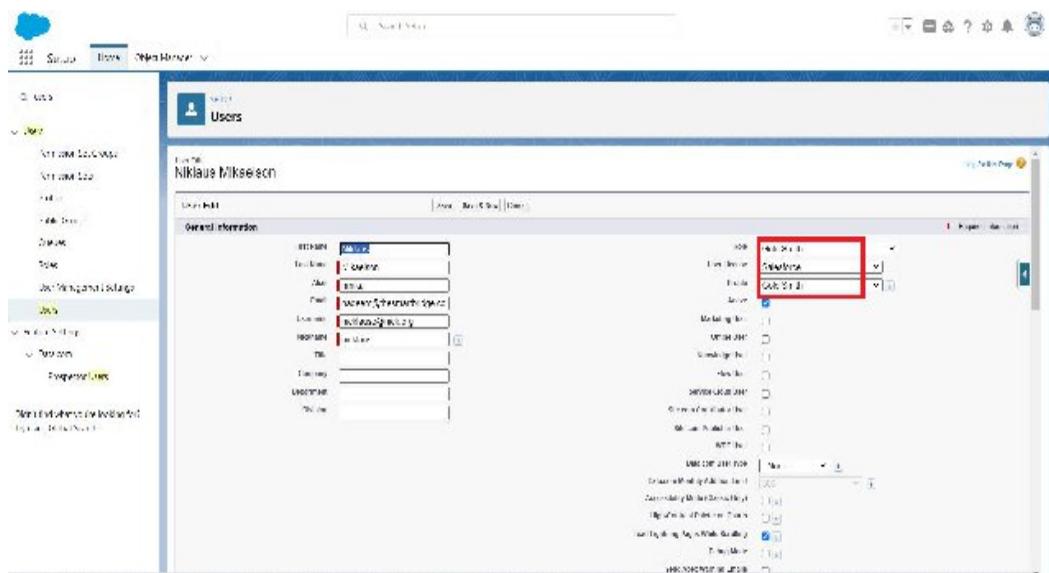
Show in tree view

Module: Users

Activity 17: Create User

1. Go to setup >> type users in quick find box >> select users >> click new user .
2. Fill in the fields
1. First Name : Niklaus
2. Last Name : Mikaelson
3. Alias : Give a Alias Name

4. Email id : Give your Personal Email id
5. User name : User name 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



Action	Full Name	Alias	Username	Role	Active	Profile
[Edit]	Chatter Expert	Chatty	chatty.00dg1000008j6hsuac.apecon2b83n16@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
[Edit]	EPIC_OrgFarm	epic	epic.3d2ab738end6@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
[Edit]	Mikaelson_dan	mida	damik@org.com	Worker	<input checked="" type="checkbox"/>	Worker Profile
[Edit]	Mikaelson_kol	mike	kolmik@org.com	Worker	<input checked="" type="checkbox"/>	Worker Profile
[Edit]	Mikaelson_niklaus	mika	niklaus@mike.com	Gold Smith	<input checked="" type="checkbox"/>	Gold Smith
[Edit]	Driya_R_Sakthi	sak	sakthiravi365257@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
[Edit]	User_Integration	Integ	integration@00dg1000008j6hsuac.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
[Edit]	User_Security	sec	insightsecurity@00dg1000008j6hsuac.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Module: Page layouts

Activity 18: To Create a Gold Page layout

The screenshot shows the Salesforce Page Layout Editor for a "Gold" page layout. At the top, there's a search bar and a "Manager" dropdown. The main area has tabs for "Page Layout for Gold" and "Layout Properties".

Fields:

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists
- Report Charts

Layout Properties:

Field	Customer Name	Item Type	Omniture	Pmt
Expected Days Of ...	KDM	Last Modified By	Owner	Pur
Gold Price	Percentage	Making Charges	Prices	Rec
Item Id				

Item Sample:

Highlights Panel:
Customize the highlights panel for this page layout...

Quick Actions In the Salesforce Classic Publisher:

Actions in this section are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning Experience Actions:

Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Item Detail:

Standard Buttons: Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, Edit Labels.

Custom Links: (Header visible on detail only)

Mobile Cards (Salesforce mobile only):
Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

Related Lists:

Activity 19: To Create a Silver Page layout

The screenshot shows the Salesforce Object Manager for the "Item" object. The left sidebar lists various layout types: 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, and Screening Rules.

The "Page Layouts" section is selected, showing a list of existing layouts: Details, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, Report Charts, and a newly created "Silver".

Layout Properties:

Field	Customer Name	Item Type	Omniture	Pmt
Expected Days Of ...	KDM	Last Modified By	Owner	Pur
Gold Price	Percentage	Making Charges	Prices	Rec
Item Id				

Information (Header visible on detail only):

Field	Value
Customer Name	Sample Test
Item Type	Sample Test
Created	Sample Test
New price	\$123.45
Weight	0.7693
New weight	0.0638
Standard price	\$123.45
Total weight	28.579
Percentage	00
Amount	\$123.45
KDM	\$123.45
Making Charges	\$123.45

Page Layout for Silver

Save | Quick Save | Preview As... | Cancel | Undo | Redo | Layout Properties

Fields

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists
- Report Charts

Item Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher

Actions in this section are currently inherited from the global publisher layout. You can [override the global publisher layout](#) to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning Experience Actions

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Item Detail

Standard Buttons	Edit	Delete	Clone	Change Owner	Change Record Type	Printable View	Sharing	Sharing Hierarchy	Edit Labels
Custom Buttons									

Custom Links (Header visible on detail only)

Mobile Cards (Salesforce mobile only)

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

Related Lists

Module: Record Types

Activity 20: To create a Record Type

SETUP > OBJECT MANAGER

Item

Record Types

2 items, Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold Items Information	✓	meghana kunte, 7/18/2023, 11:45 AM
Silver	Silver Items Information	✓	meghana kunte, 7/18/2023, 11:45 AM

Record Types

Search Setup

Object Manager ▾

Record Type
Gold

« Back to Custom Object: Item

Help for this Page

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.

Edit

Record Type Label	Gold	Active	<input checked="" type="checkbox"/>
Record Type Name	Gold		
Namespace Prefix			
Description	Gold items information	Modified By	Sakthi Priya R, 8/31/2025, 5:23 AM
Created By	Sakthi Priya R, 8/31/2025, 5:23 AM	Modified Date	8/31/2025, 5:23 AM

Picklists Available for Editing

Action	Field	Modified Date
Edit	Expected Days Of Return	8/31/2025, 5:23 AM
Edit	Item Type	8/31/2025, 5:23 AM
Edit	Priority	8/31/2025, 5:23 AM

Picklists Available for Editing Help

The screenshot shows the Salesforce Record Type Manager. At the top, it says "Manager" and "Record Type Silver". Below that is a large pink area with a decorative pattern. On the right side, there's a "Help" link and a "Back to Custom Object: Item" link. The main content area displays the following information:

Record Type Label		Silver	Active	<input checked="" type="checkbox"/>			
Record Type Name	Silver						
Namespace Prefix							
Description	Silver items information						
Created By	<u>Sakthi Priya R</u>		8/31/2025, 5:25 AM	Modified By	<u>Sakthi Priya R</u>		8/31/2025, 5:25 AM

Below this, there's a section titled "Picklists Available for Editing" with a table:

Action	Field	Modified Date
Edit	Expected Days Of Return	8/31/2025, 5:25 AM
Edit	Item Type	8/31/2025, 5:25 AM
Edit	Priority	8/31/2025, 5:25 AM

Module: Permission sets

Activity 21: Creating permission set

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

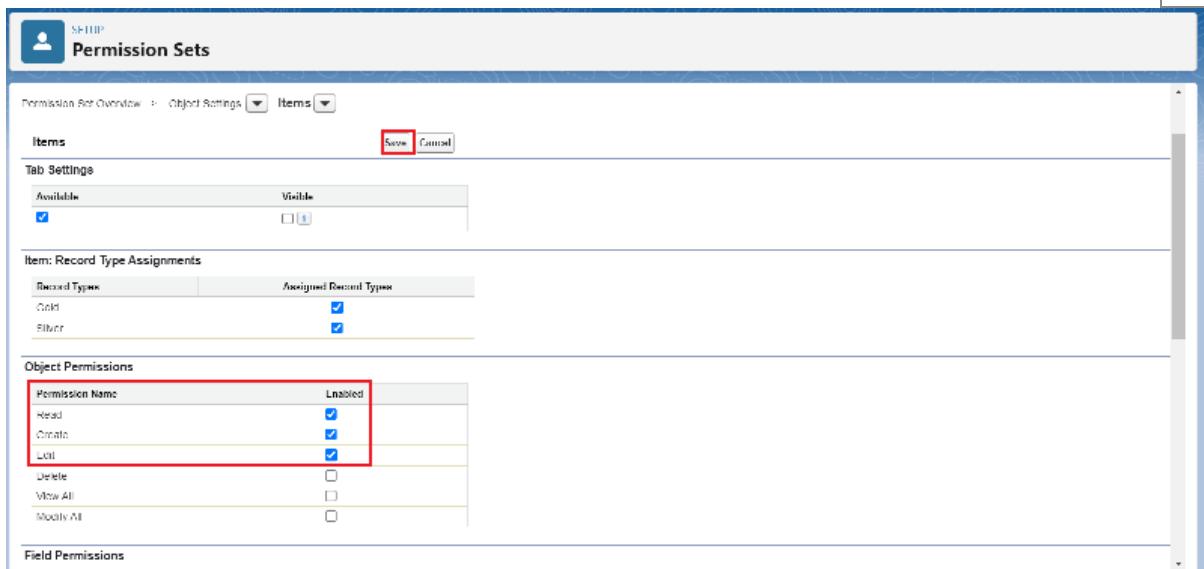
1. Go to setup >> type “permission sets” in quick search >> select permission sets >> New.

2. Enter the label name as "Per to Worker", API will be auto populated? save.

3.

4. Under Apps Select object settings.

4. Click on Items object? click on Edit? under Item: Record Type Assignments, enable Gold, Silver? Object permission check for read, edit and create.



5. Click on Save.
6. After saving the permission click on the Manage assignment
7. Now click on the Add Assignment.

... > PERMISSION SET 'PER TO WORKER' > MANAGE ASSIGNMENT EXPIRATION

Per to Worker

Select Users to Assign

All Users ▾

9 items • Sorted by Full Name • Filtered by All users • Updated a few seconds ago

Full Name	Role	Profile
Charter Expert	Chatter	Chatter Free User
Integration User	integ	Analytics Cloud Integration User
Mani deepak	mdeep	Worker
Megha Katoju Site Guest User	guest	Megha Katoju Profile
Meghana Katoju Site Guest User	guest	Meghana Katoju Profile

Cancel Next

8. Now select the users which you have created in user milestone, using worker profile and click on Next? Assign? Done.

... > PERMISSION SET 'PER TO WORKER' > MANAGE ASSIGNMENT EXPIRATION

Per to Worker

Select an Expiration Option For Assigned Users

No expiration date ⓘ

Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Mani deepak	Worker	Worker	✓	Salesforce Platform	Never Expires

Cancel Back Assign

Permission Sets

Permission Set Overview

Setting	Value
Description	Per to Worker
License	Standard
Session Duration	Default
Permission Set Groups	0
Added To	0

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sources

Flow Access
Permissions to execute Flows

Named Credential Access
Permissions to authenticate against named credentials

External Credential Principal Access
Permissions to authenticate with external credential principal mappings

Service Presence Statuses Access
Permissions to access Service Presence Statuses

Custom Permissions
Permissions to access custom processes and apps

Custom Metadata Types
Permissions to access custom metadata types

Custom Setting Definitions
Permissions to access custom

Module: Trigger

Activity 22: Create a Trigger Handler class

Trigger handler:

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

promotes modular coding practices and reduces the chances of code duplication.

CODE:

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

Activity 23: Create the trigger

CODE:

```
trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {  
    if (Trigger.isInsert) {  
        UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);  
    } else if (Trigger.isUpdate) {  
        UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap,  
                                                       Trigger.new);  
    }  
}
```

Module: User Adoption

Activity 24: Create a Record (Jewel Customer)

1. Click on App Launcher on the left side of the screen.
2. Search Jewellery Inventory System & click on it.

The screenshot shows the Salesforce Setup interface. At the top, there is a blue header bar with the word "Setup" in white. Below it is a navigation bar with tabs: "Home" (selected), "Object Manager", and a dropdown arrow. To the right of the navigation bar is a search bar with the placeholder "Search Setup" and a magnifying glass icon. Above the search bar is a blue cloud icon.

The main content area is titled "App Launcher". A search bar contains the text "Jew". Below the search bar, the results are listed under the heading "Apps". The first result is "Jewellery Inventory System", which has a small icon of a crown and a magnifying glass. Other results include "Items" and "Jewel Customers". At the bottom of the list is a blue link "View All".

To the right of the App Launcher, there is a sidebar with the title "Permission Set Overview". It shows the following details:

- Description: **Worker**
- License:
- Session Activation Required:
- Permission Set Groups Added To: 0

Below the sidebar is a section titled "Apps" which is currently empty.

A message at the bottom left says: "Didn't find what you're looking for? Try using Global Search."

3. Click on Drop Down and Click on the Jewel Customer tab.
4. Click new.

This screenshot shows the "Jewel Customers" list view within the "Jewelry Inventory System". The top navigation bar includes the system name, a dropdown menu, and various icons. The main area displays a table with columns: "Customer Name", "Recently Viewed", "Jewel Customers", and "Customer Details". The "Jewel Customers" column is highlighted with a red box and a red arrow pointing to it. The "Customer Details" column is also highlighted with a red box and a red arrow pointing to it. The table has a header row and several data rows. At the bottom right of the table are buttons for "New", "Import", and "Change Owner".

5. Fill the Details and click on Save.

Activity 25: View a Record (Jewel Customer)

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

Activity 26: Delete a Record (Jewel Customer)

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

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

The screenshot shows the Jewellery Inventory system's interface. At the top, there's a header with a search bar containing 'Search...' and a magnifying glass icon. To the right of the search bar are three icons: a star with a dropdown arrow, a plus sign, and a diamond with a dropdown arrow. Below the header, the title 'Jewellery Inventory ...' is displayed, followed by a tab labeled 'Jewel Customers'. On the far right, there's a dropdown menu and another diamond icon with a dropdown arrow.

The main content area is titled 'Jewel Customer person1'. It has two tabs: 'Related' and 'Details'. The 'Details' tab is currently selected. The form contains the following fields:

- Customer Name:** person1
- City:** Ooty
- Phone:** (978) 654-3219
- Email:** person123@gmail.com
- State:** Tamil Nadu
- Street:** indunagar
- Country:** India
- Zip/Postal code:** 643005
- Created By:** Sakthi Priya R.
- Created Date:** 8/31/2025, 6:54 AM
- Last Modified By:** Sakthi Priya R.
- Last Modified Date:** 8/31/2025, 6:54 AM


★
▼
+
...

Jewellery Inventory ...
Jewel Customers
▼
 person1

 Jewel Customers
Recently Viewed
▼


10 items · Updated a few seconds ago

	<input type="checkbox"/> Customer Name
1	<input type="checkbox"/> person 10
2	<input type="checkbox"/> person 9
3	<input type="checkbox"/> person 8
4	<input type="checkbox"/> person 7
5	<input type="checkbox"/> person 6
6	<input type="checkbox"/> person 5
7	<input type="checkbox"/> person 4
8	<input type="checkbox"/> person 3
9	<input type="checkbox"/> person 2
10	<input type="checkbox"/> person 1


★
▼
+
...

Jewellery Inventory ...
Customer Orders
▼
 person1

 Customer Order
customer-01

Related	Details
Customer Order Name	customer-01
Customer	person1 
Item	Item-01 
Order Status	Completed 
Created By	Sakthi Priya R. 
	8/31/2025, 7:22 AM
Last Modified By	Sakthi Priya R. 
	8/31/2025, 7:22 AM


Search...

Jewellery Inventory ...
Customer Orders
▼
 person1 ...

Customer Orders
Recently Viewed ▾



10 items · Updated a few seconds ago

	<input type="checkbox"/> Customer Order Name
1	<input type="checkbox"/> customer-10
2	<input type="checkbox"/> customer-09
3	<input type="checkbox"/> customer-08
4	<input type="checkbox"/> customer-07
5	<input type="checkbox"/> customer-06
6	<input type="checkbox"/> customer-05
7	<input type="checkbox"/> customer-04
8	<input type="checkbox"/> customer-03
9	<input type="checkbox"/> customer-02
10	<input type="checkbox"/> customer-01


Search...

Jewellery Inventory ...
Items
▼
 person1 ...
▼
X

Item
Item-01

Related	Details
Item Id Item-01	Owner  Sakthi Priya R. 
Customer Name person1	Priority Low 
Prices Price-10	Expected Days Of Return 8-10 Days 
Item Type Gold	
Ornament bangle	
Silver Price 0.780	
Weight 3.67000	
Purity 10	
Percentage 10	
Stone Weight 5.60000	
Total Weight -1.930	
Stone/Other Price \$2,000.00	
Amount -\$965.000	
KDM -\$97	
Making Charges \$1.101	
Created By  Sakthi Priya R. 8/31/2025, 7:11 AM	Last Modified By  Sakthi Priya R. 8/31/2025, 7:11 AM

Jewellery Inventory ...

Items

Recently Viewed ▾

10 items · Updated a few seconds ago

	<input type="checkbox"/> Item Id
1	<input type="checkbox"/> Item-10
2	<input type="checkbox"/> Item-09
3	<input type="checkbox"/> Item-08
4	<input type="checkbox"/> Item-07
5	<input type="checkbox"/> Item-06
6	<input type="checkbox"/> Item-05
7	<input type="checkbox"/> Item-04
8	<input type="checkbox"/> Item-03
9	<input type="checkbox"/> Item-02
10	<input type="checkbox"/> Item-01

Search...

Jewellery Inventory ...

Billing

Billing-01

Related Details

Billing Name	Billing-01
Item	Item-10
Ornament	bracelet
Stone weight	5.60
Weight	-1.93
Amount	-\$1.74
Gold/Silver Price	\$0.00
KDM Charge	\$0
Making Charges	\$36.70
Stones/other price	\$345.00
Total Amount	\$380
Paying Amount	\$20,000
Paid Amount	\$20,000
Created By	Sakthi Priya R.
Created On	8/31/2025, 7:28 AM
Last Modified By	Sakthi Priya R.
Last Modified On	8/31/2025, 7:28 AM

Search...

The image shows two side-by-side screens from a mobile application for managing a "Jewellery Inventory".

Left Screen (Price Entry):

- Header:** Jewellery Inventory ...
- Toolbar:** Prices, Search bar, and icons for star, plus, minus, question mark, and close.
- Section:** Price
- Entry:** Price-01
- Form Fields:**
 - Related: Price Name (Price-01)
 - Details: Owner (Sakthi Priya R.)
 - Gold Price: \$10,000
 - Silver Price: \$4,000.00000
 - Created By: Sakthi Priya R.
 - Last Modified By: Sakthi Priya R.
 - Date: 8/31/2025, 7:05 AM

Right Screen (Recently Viewed List):

- Header:** Jewellery Inventory ...
- Toolbar:** Prices, Search bar, and icons for star, plus, minus, question mark, and close.
- Section:** Prices
- Section:** Recently Viewed ▾
- Text:** 10 items · Updated a few seconds ago
- List:** A numbered list of 10 recently viewed items, each with a checkbox and a link:
 - 1 Price-10
 - 2 Price-09
 - 3 Price-08
 - 4 Price-07
 - 5 Price-06
 - 6 Price-05
 - 7 Price-04
 - 8 Price-03
 - 9 Price-02
 - 10 Price-01
- Text:** Search this

Jewellery Inventory ... **Billings** person1 ...

Billings Recently Viewed ▾

10 items · Updated a few seconds ago

	Billing Name
1	Billing-10
2	Billing-09
3	Billing-08
4	Billing-07
5	Billing-06
6	Billing-05
7	Billing-04
8	Billing-03
9	Billing-02
10	Billing-01

Module: Reports

Activity 27: Create Report

1. Go to the app >> click on the reports tab
2. Click New Report.

Jewelry Inventory S... **Reports**

Recent 12 items

REPORTS

Report Name	Folder	Created By	Created On	Subscribed
New Report Billing v order	Private Reports	meghana.konju	7/10/2023, 4:34 AM	
New Items with 0%	Private Reports	meghana.konju	7/10/2023, 4:30 AM	
New Price Report	Private Reports	meghana.konju	7/10/2023, 4:27 AM	
Days on Market	DreamHouse Reports	meghana.konju	5/9/2022, 11:25 PM	
New Billings with Re	Private Reports	meghana.konju	6/14/2023, 5:45 PM	✓
New Billings with Re	Private Reports	meghana.konju	7/10/2023, 8:08 PM	
All Reports	Private Reports	meghana.konju	7/10/2023, 12:51 AM	
New Opportunities R	Private Reports	meghana.konju	7/10/2023, 12:01 AM	
New Accounts Repor	Private Reports	meghana.konju	7/11/2023, 11:49 PM	
New orders Report	Private Reports	meghana.konju	6/11/2023, 11:59 PM	
New Billings with Pri	Private Reports	meghana.konju	6/20/2023, 11:08 PM	
Copy of New Report	Private Reports	meghana.konju	6/20/2023, 11:08 PM	
New Employees Report	Private Reports	meghana.konju	6/20/2022, 11:08 PM	

The screenshot shows the Odoo Reports interface for the Jewellery Inventory module. The top navigation bar includes a logo, search, and various icons. The main title is "Jewellery Inventory ...". Below it, there's a "Reports" tab and a search bar for recent reports. On the left, a sidebar lists categories like "Recent", "Created by Me", "Private Reports", "Public Reports", "All Reports", "Folders", "All Folders", "Created by Me", "Shared with Me", and "Favorites", "All Favorites". The main content area displays a table of reports with columns for Report Name, Description, Folder, and Created By. Three reports are listed: "Items with Customer Orders Report", "Billings with Item Report", and "Price Report", all categorized under "Private Reports" and created by "Sakthi Pr".

Report Name	Description	Folder	Created By
Items with Customer Orders Report		Private Reports	Sakthi Pr
Billings with Item Report		Private Reports	Sakthi Pr
Price Report		Private Reports	Sakthi Pr

The screenshot shows the results of the "Items with Customer Orders Report". The title is "Report: Items with Customer Orders" and the specific report is "Items with Customer Orders Report". It includes an "Enable Field Edit" button. The results table has two columns: "Item: Item Id" and "Customer Order: Customer Order Name". The table lists 10 items, each associated with a customer order. The total records are 10.

	Item: Item Id	Customer Order: Customer Order Name
1	Item-06	customer-06
2	Item-02	customer-02
3	Item-09	customer-09
4	Item-04	customer-04
5	Item-01	customer-01
6	Item-05	customer-05
7	Item-03	customer-03
8	Item-07	customer-07
9	Item-08	customer-08
10	Item-10	customer-10

Module: Dashboards

Activity 28: Create Dashboard

1. Go to the app >> click on the dashboard tab

- Click New dashboard.

The screenshot shows the 'Jewellery Inventory' application's dashboard creation interface. At the top, there's a navigation bar with icons for search, refresh, and settings. Below it is a header bar with tabs for 'Dashboards' and 'Recent'. A sidebar on the left lists categories like 'Dashboards', 'Recent', 'Created by Me', 'Private Dashboards', 'All Dashboards', 'Folders', 'All Folders', 'Created by Me', 'Shared with Me', 'Favorites', and 'All Favorites'. The main area displays two dashboards: 'Dashboard 2' and 'Dashboard 1'. 'Dashboard 2' has a single card showing a ring. 'Dashboard 1' is currently being configured, with its title set to 'Dashboard 1'. The configuration panel includes sections for 'Dashboard Name' (set to 'Dashboard 1'), 'Description' (empty), and a preview area. The preview area shows the title 'Jewellery Inventory ...' and the subtitle 'Dashboard 1'. It also displays a message: 'refreshed 3 days ago. Refresh this dashboard to see the latest data.' and the timestamp 'Sep 1, 2025, 12:09 AM'. A user profile 'Viewing as Sakthi Priya R' is shown. The preview area contains a table titled 'Billings with Item Report' with two columns: 'Billing' and 'Item'. The data is as follows:

Billing	Item
Billing-01	Item-10
Billing-02	Item-09
Billing-03	Item-08
Billing-04	Item-07
Billing-05	Item-06
Billing-06	Item-06
Billing-07	Item-05

[View Report \(Billings with...\)](#) As of Sep 1, 2025, 12:09 AM

Module: Flows

Activity 29: Create a Flow

- Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.

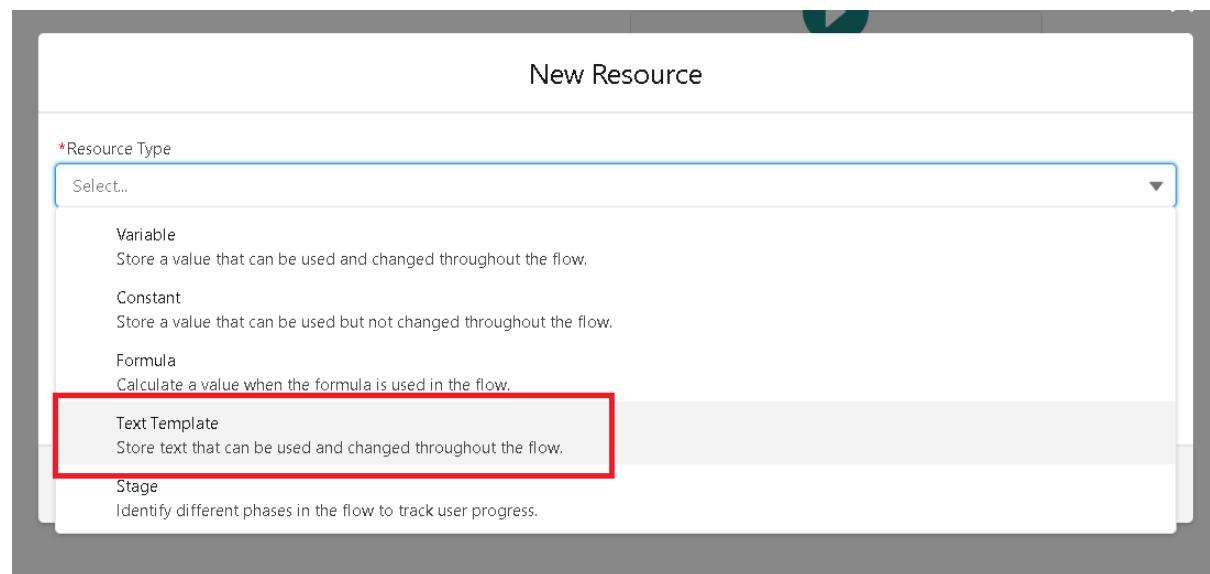
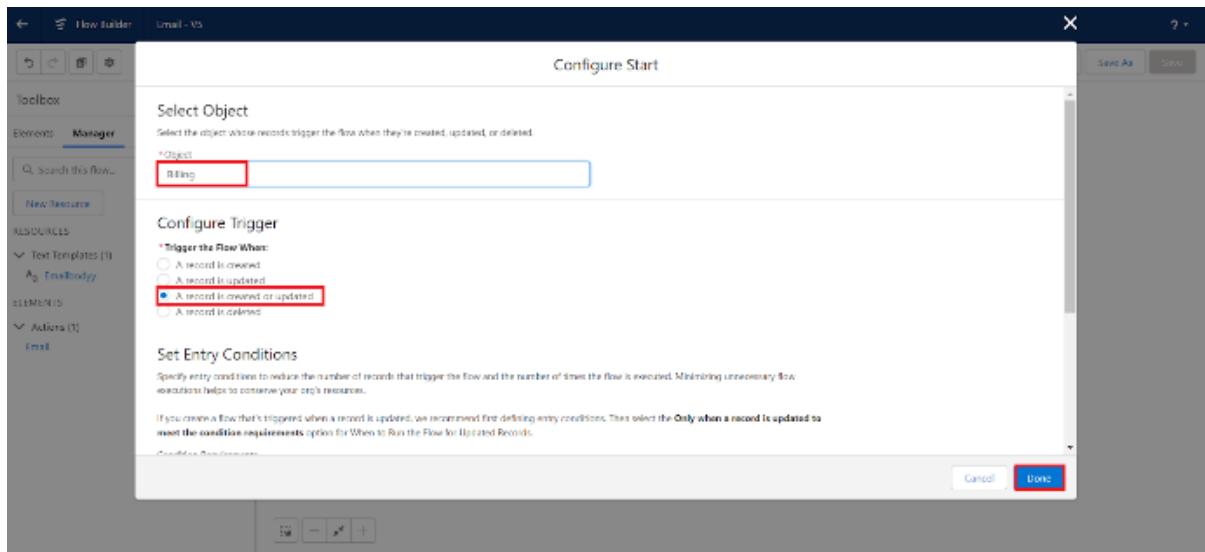
2. Select the Record-triggered flow and Click on Create.

3. Select the Object as a "Billing" in the drop down list.

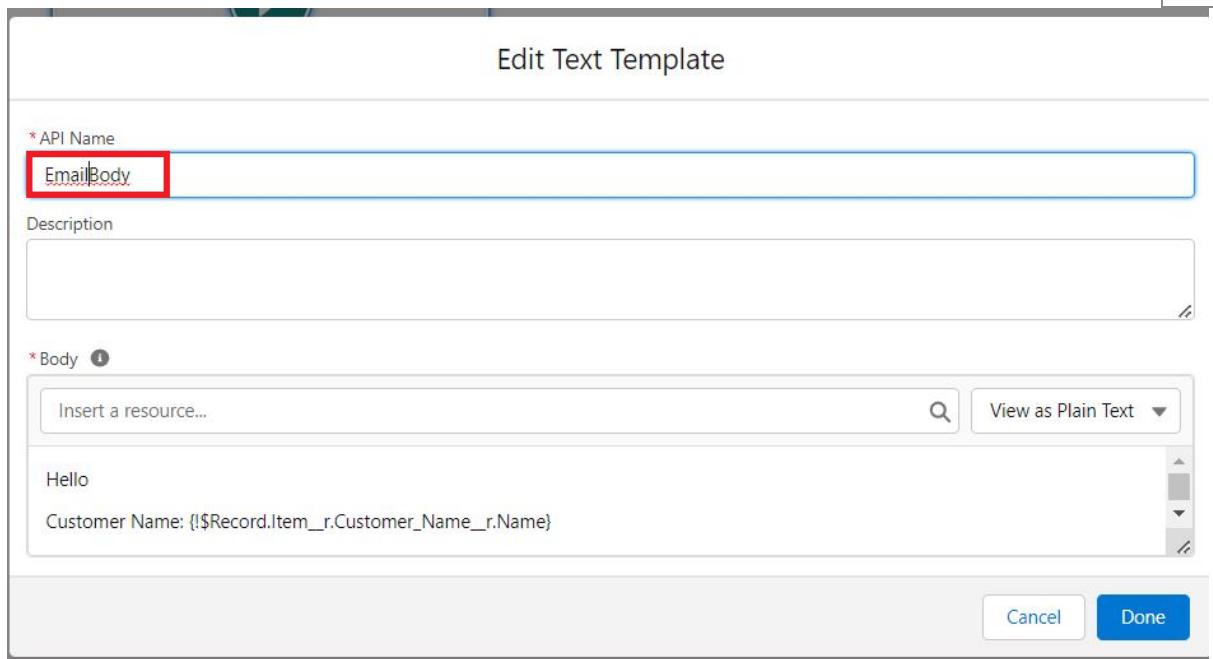
4. Select the Trigger Flow when: "A record is Created or Updated".

5. Select the Optimise the flow for: "Actions and Related Records" and Click on Done.

- Now change the mode for m Auto-layout to free-form.
- Now select the manger option in the toolbox, click new resource.
- Select the resource type as text template.



- Enter the API name as "Email body".



10. Change the view as Rich Text? View to Plain Text.

11. In the body field paste the syntax that is given below.

Hello

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

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

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

Ornament: {\$Record.Ornament__c}

Weight: {\$Record.Weight__c} grams

Amount: {\$Record.Amount__c}

12. Click done.

13. Now click on elements, and drag the action element into the preview pane.

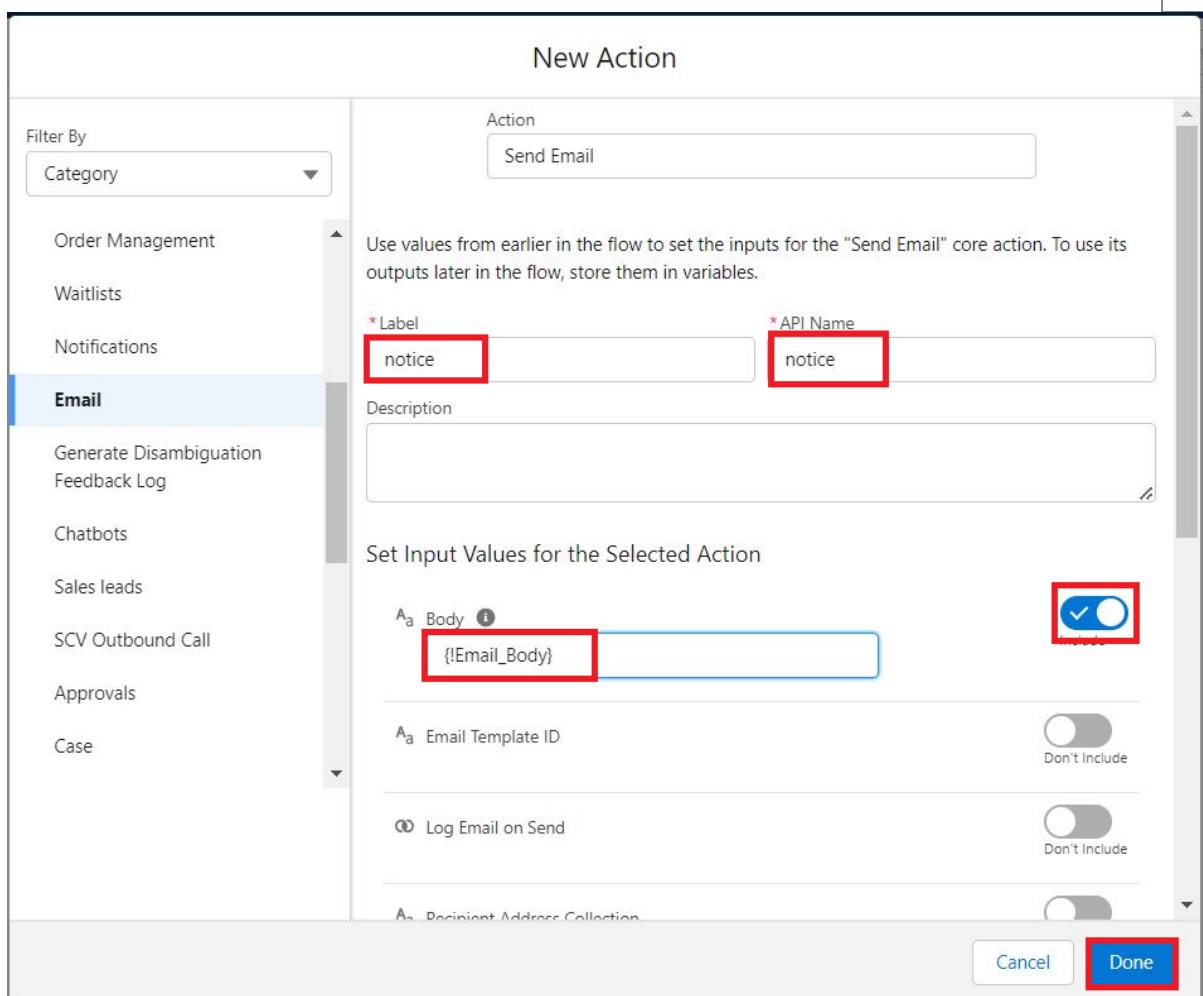
14. Their action bar will be opened in that search for "send email" and click on it.

15. Give the label name as "notice"

16. API name will be auto populated.

17. Enable the body in set input values for the selected action.

18. Select the text template that was created.

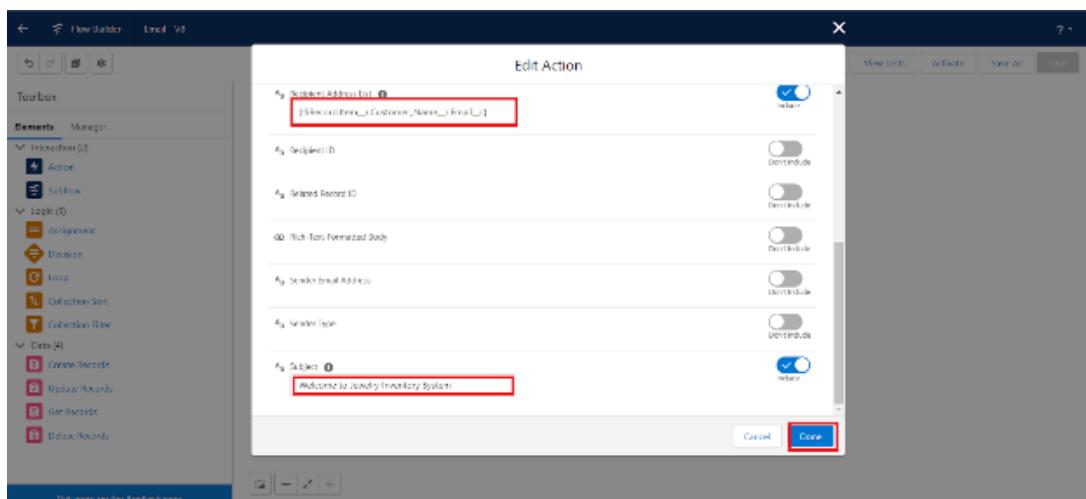


19. Include Recipient Address list, select the email from the record.

`({!!$Record.Item_r.Customer_Namer.Email_c})`

20. Include the subject as “Welcome to Jewellery Inventory System”.

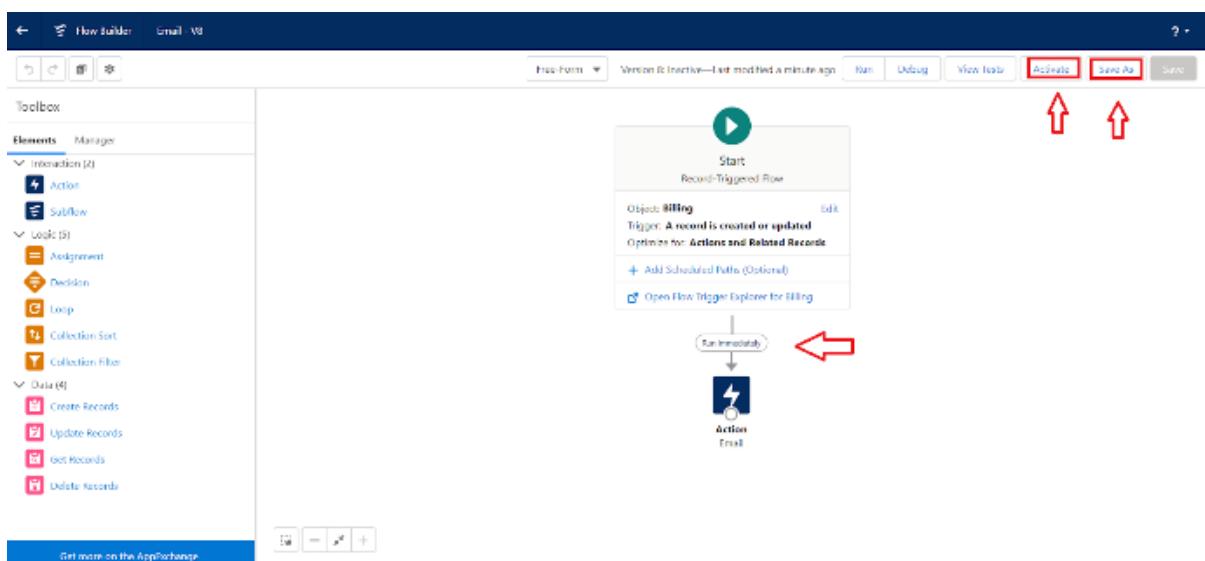
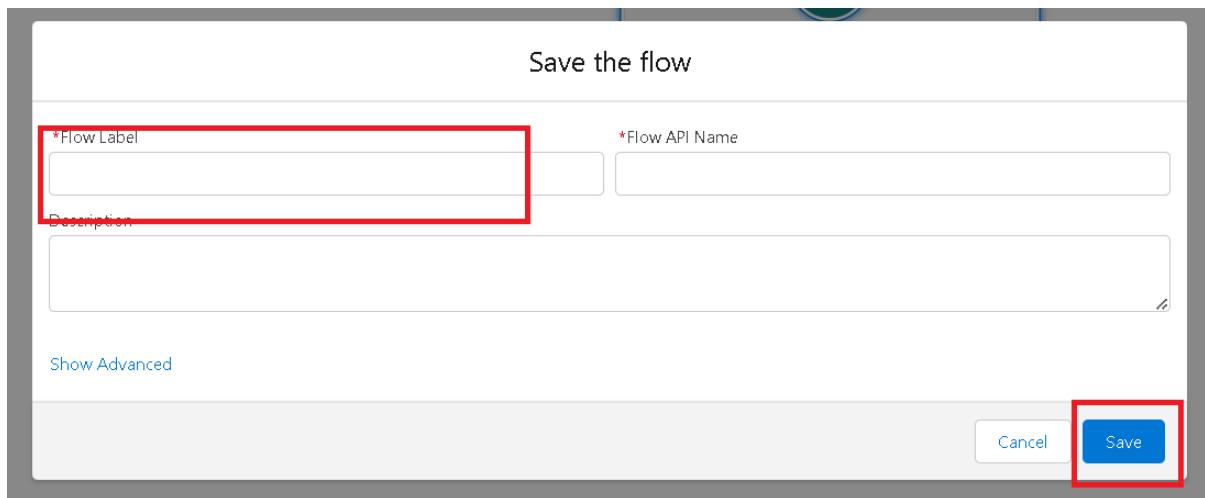
21. Click done.



22. Now drag the path from the start to the action element.

23. Click on save. Given the Flow label, Flow API name will be auto populated.

24. And click save, and click on activate.



Student Learning Outcomes

- Hands-on skills in Salesforce development and CRM customization.
- Improved problem-solving through real-time use case implementation.
- Team collaboration in handling requirement analysis, development, and testing.
- Exposure to industry-relevant tools and project lifecycle management.

System Requirements:

Hardware Requirements:

- Computer with min/ sum 4 GB RAM, Dual-core processor
- Stable internet connection

Software Requirements:

- Salesforce Developer Edition Org
- Modern Web Browser (e.g., Google Chrome, Firefox)

Benefits of CRM in Jewellery Management

Better customer satisfaction

Increased repeat sales with loyalty programs

Real-time tracking of stock and sales

Automated promotions during peak seasons

Improved decision-making with analytics

Conclusion

The CRM Application for Jewel Management successfully streamlines customer interactions, sales, inventory, and marketing in one integrated platform. It enhances customer experience, boosts operational efficiency, and provides valuable business insights. With a strong foundation now in place, the system is ready to scale and support future growth in a competitive jewellery market.