

# **Project Name**

**Crm Application for Jewel Management - (admin)**

**By**

**SAMEER SYED**

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# Task 1:

## Creating Developer Account

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

The screenshot shows the Salesforce Developer Edition Signup page. On the left, there is a graphic of a computer monitor displaying a Salesforce interface, with the text "Build enterprise-quality apps fast to bring your ideas to life" and a list of benefits:

- 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

On the right, the sign-up form is titled "Sign up for your Salesforce Developer Edition" and "A Salesforce Platform environment for free." It includes a note: "Complete the form to get access to the Salesforce Developer Edition." The form fields are:

- First Name\* (Your first name)
- Last Name\* (Your last name)
- Email\* (Your email address)
- Role\* (Your job role, dropdown menu)
- Company\* (Company Name)
- Country/Region\* (dropdown menu)

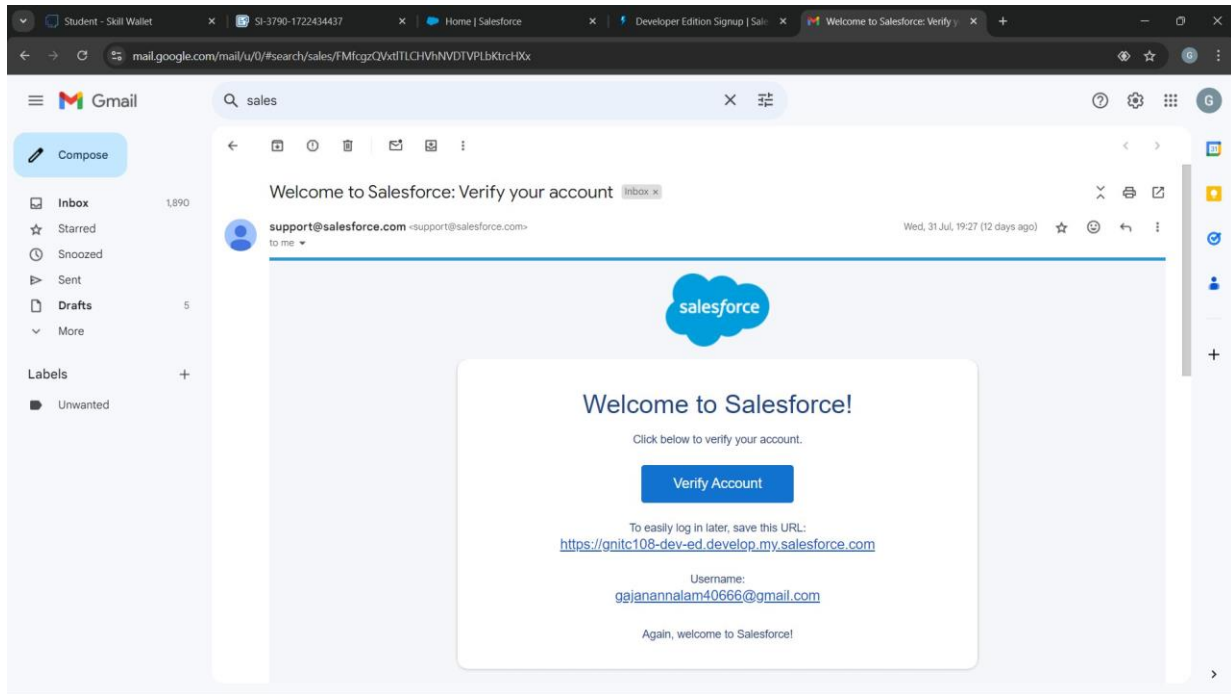
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format : username@organization.com Click on sign me up after filling these.

## Task 2:

### Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account

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

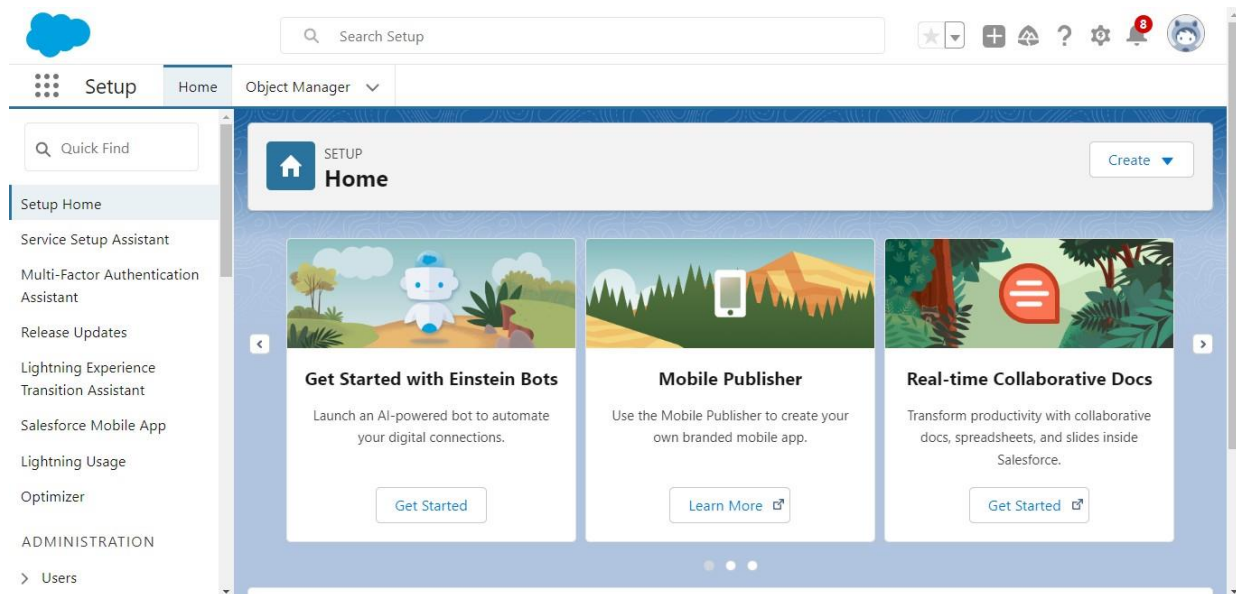
In what city were you born?

\* Answer

asdfghjkl

Change Password

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



## Task 3:

### What is an Object?

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects.

### Create Jewel Customer Object

1. To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

2. Enter the label name >> Jewel Customer

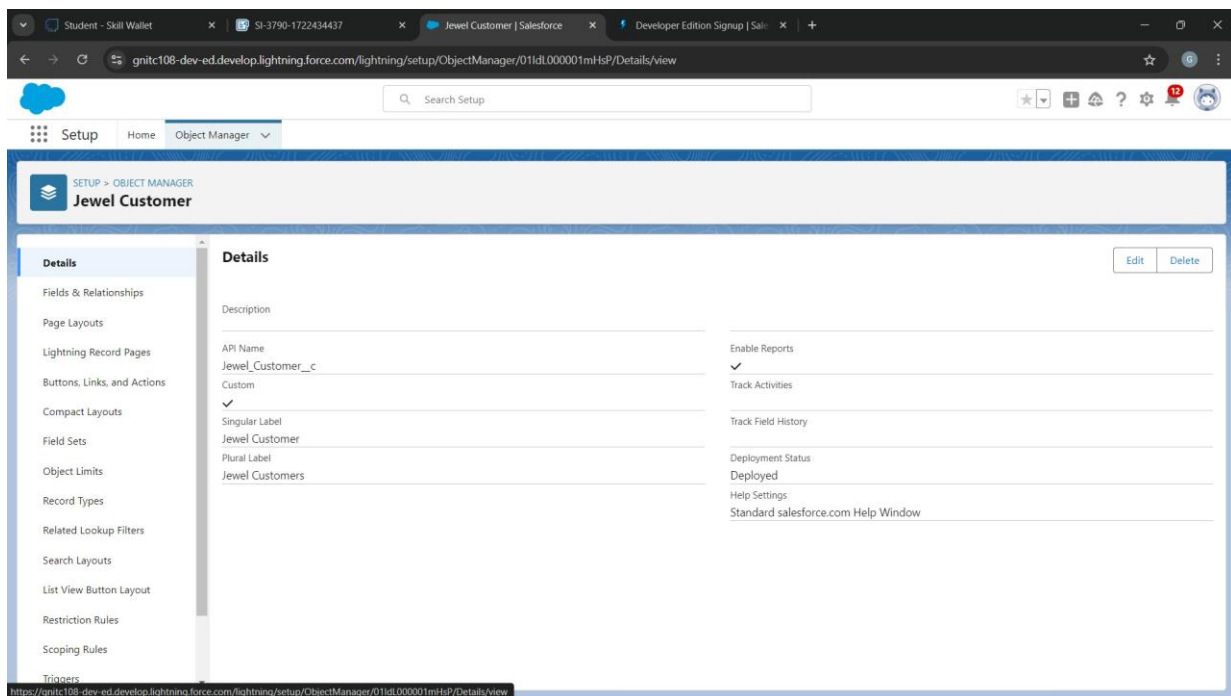
3. Plural label name >> Jewel Customers

4. Enter Record Name Label and Format

- Record Name --> Customer name
- Data Type --> Text

5. Click on Allow reports.

6. Allow search --> Save.



Create 3 more objects with label names as Customer Order, Price, Billing  
(Use "Auto Number" as a data type for Customer Order, Price, Billing).

# Customer Order

The screenshot shows the Salesforce Setup interface for the 'Customer Order' object. The browser address bar displays the URL: `gnitc108-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001mLEz/Details/view`. The page title is 'Customer Order'. On the left, a sidebar menu lists various configuration options: 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, and Triggers. The 'Details' section is active, showing a form with the following fields:

Field	Value
Description	
API Name	Customer_Order__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Customer Order
Plural Label	Customer Orders
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	<input type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

# Price

The screenshot shows the Salesforce Setup interface for the 'Price' object. The browser address bar displays the URL: `gnitc108-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001mLEz/Details/view`. The page title is 'Price'. The sidebar menu is identical to the previous screenshot. The 'Details' section is active, showing a form with the following fields:

Field	Value
Description	
API Name	Price__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Price
Plural Label	Prices
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	<input type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.



# Billing

The screenshot shows the Salesforce Setup interface for the Billing object. The browser address bar indicates the URL: `gnitc108-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001mlN3/Details/view`. The page title is "Billing" under the "Object Manager" section. A left-hand navigation menu lists various configuration options: 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, and Triggers. The "Details" section is currently selected and expanded, showing a list of fields and their values. The fields are organized into two columns. The first column includes Description, API Name (Billing\_\_c), Custom (checked), Singular Label (Billing), Plural Label (Billings), and a link to Billings. The second column includes Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and a link to Standard salesforce.com Help Window. At the top right of the details section, there are "Edit" and "Delete" buttons.

Setup > OBJECT MANAGER  
**Billing**

**Details** Edit Delete

Description	
API Name	Enable Reports
Billing__c	✓
Custom	Track Activities
✓	
Singular Label	Track Field History
Billing	
Plural Label	Deployment Status
Billings	Deployed
	Help Settings
	Standard salesforce.com Help Window

# Task 4

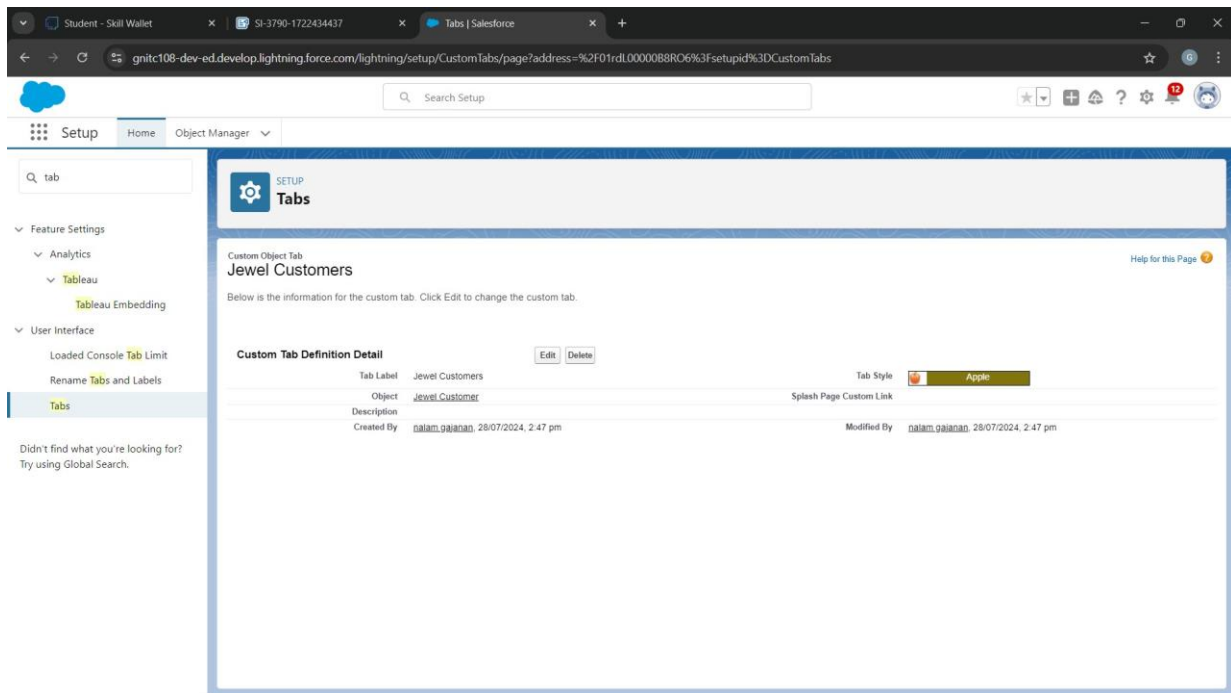
## Tabs

What is Tab: A tab is like a user interface that is used to build records for objects and to view the records in the objects.

## 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)
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.



## Create a Tab:(Item)

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'tab' entered and a navigation menu with 'Feature Settings', 'Analytics', 'Tableau', 'Tableau Embedding', 'User Interface', 'Loaded Console Tab Limit', 'Rename Tabs and Labels', and 'Tabs'. The main content area is titled 'SETUP Tabs' and shows the configuration for a custom tab named 'Items'. Below the title, it says 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' section includes a table with the following data:

Tab Label	Items	Tab Style	Apple
Object	Item	Splash Page Custom Link	
Description			
Created By	naiam.gajanan, 28/07/2024, 2:50 pm	Modified By	naiam.gajanan, 28/07/2024, 2:50 pm

Buttons for 'Edit' and 'Delete' are visible next to the 'Custom Tab Definition Detail' title.

## Create a Tab:(Customer Order)

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'tab' entered and a navigation menu with 'Feature Settings', 'Analytics', 'Tableau', 'Tableau Embedding', 'User Interface', 'Loaded Console Tab Limit', 'Rename Tabs and Labels', and 'Tabs'. The main content area is titled 'SETUP Tabs' and shows the configuration for a custom tab named 'Customer Orders'. Below the title, it says 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' section includes a table with the following data:

Tab Label	Customer Orders	Tab Style	Bliss
Object	Customer_Order	Splash Page Custom Link	
Description			
Created By	naiam.gajanan, 28/07/2024, 2:52 pm	Modified By	naiam.gajanan, 28/07/2024, 2:52 pm

Buttons for 'Edit' and 'Delete' are visible next to the 'Custom Tab Definition Detail' title.

## Create a Tab:(Price)

The screenshot shows the Salesforce Setup interface for a custom tab named 'Prices'. The left sidebar contains a search bar with 'tab' and a navigation menu with 'Feature Settings' (Analytics, Tableau), 'User Interface' (Loaded Console Tab Limit, Rename Tabs and Labels), and 'Tabs'. The main content area is titled 'SETUP Tabs' and shows the 'Custom Object Tab Prices' configuration. Below the title, it says 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' table lists the tab's properties.

Custom Tab Definition Detail		Tab Style
Tab Label	Prices	Balls
Object	Price	
Description		Splash Page Custom Link
Created By	najam.gajanan, 28/07/2024, 2:52 pm	Modified By
		najam.gajanan, 28/07/2024, 2:52 pm

## Create a Tab:(Billing)

The screenshot shows the Salesforce Setup interface for a custom tab named 'Billings'. The left sidebar contains a search bar with 'tab' and a navigation menu with 'Feature Settings' (Analytics, Tableau), 'User Interface' (Loaded Console Tab Limit, Rename Tabs and Labels), and 'Tabs'. The main content area is titled 'SETUP Tabs' and shows the 'Custom Object Tab Billings' configuration. Below the title, it says 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' table lists the tab's properties.

Custom Tab Definition Detail		Tab Style
Tab Label	Billings	Apple
Object	Billings	
Description		Splash Page Custom Link
Created By	najam.gajanan, 28/07/2024, 2:51 pm	Modified By
		najam.gajanan, 28/07/2024, 2:51 pm

## Task 5 :

### The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps gives users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

### Create a Lightning App

To create a lightning app page:

1. Go to setup page>>search "app manager" in quick find>>select "app manager">>click on New lightning App.

- 2.Fill the app name in app details and branding as follow

App Name : Jewellery Inventory System.

Developer Name : This will auto populated

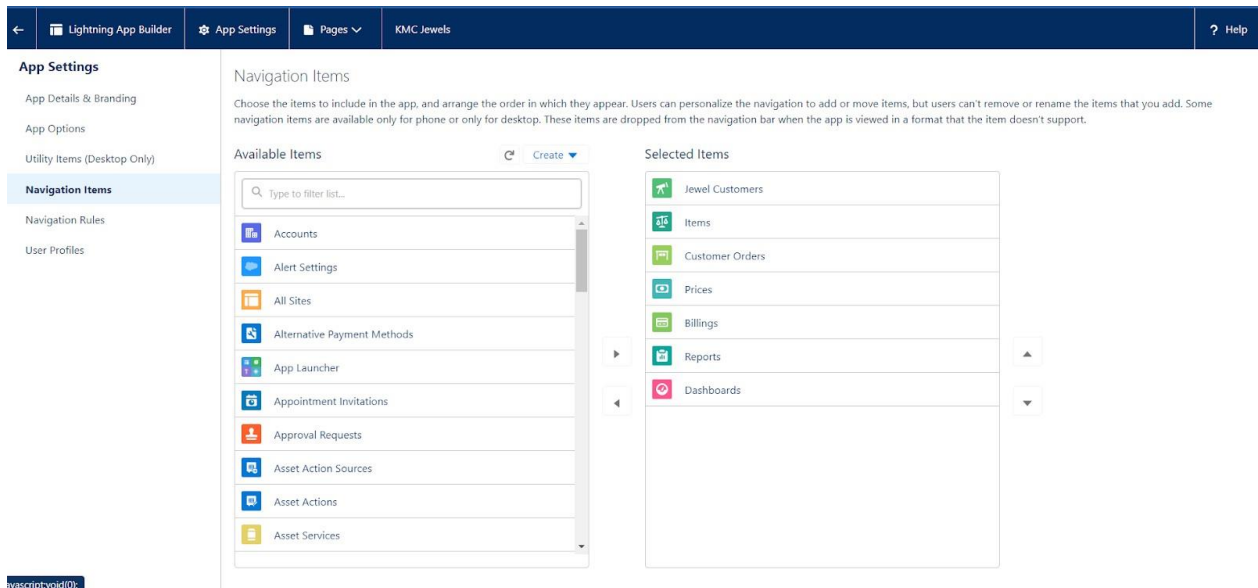
Description : Elevate your look with elegance

Image : optional (if you want to give any image you can otherwise not mandatory)Primary colour hex value : keep this default.

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

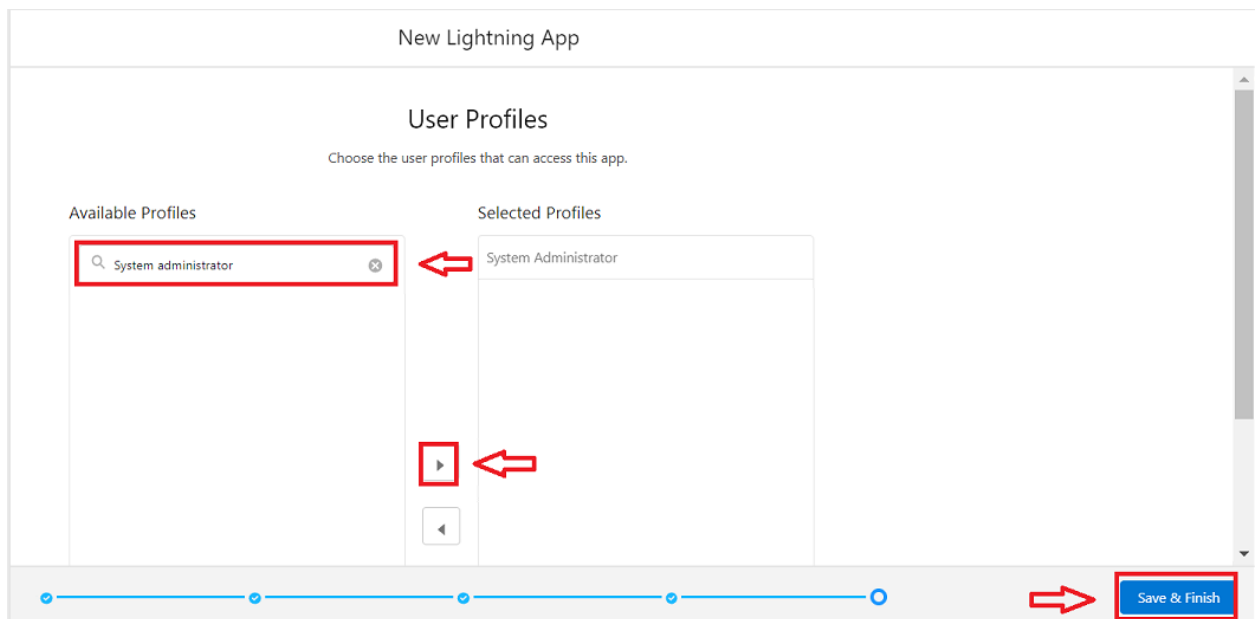
- 4.(Utility Items) keep it as default>>Next.

5. To Add Navigation Items:



Search for the item in the (JewelCustomer,Item,CustomerOrder,Price,Billing,Reports, Dashboard) from the search bar and move it using the arrow button>>Next>>Next.

6. To Add User Profiles:



Search profiles (System administrator) in the search bar>>click on the arrow button>>save & finish.

## Task 6 :

### Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields :

- Standard Fields
- Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

>> Created By

>> Owner

>> Last Modified

>> Field Made During object Creation

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organiser or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

Use Case:

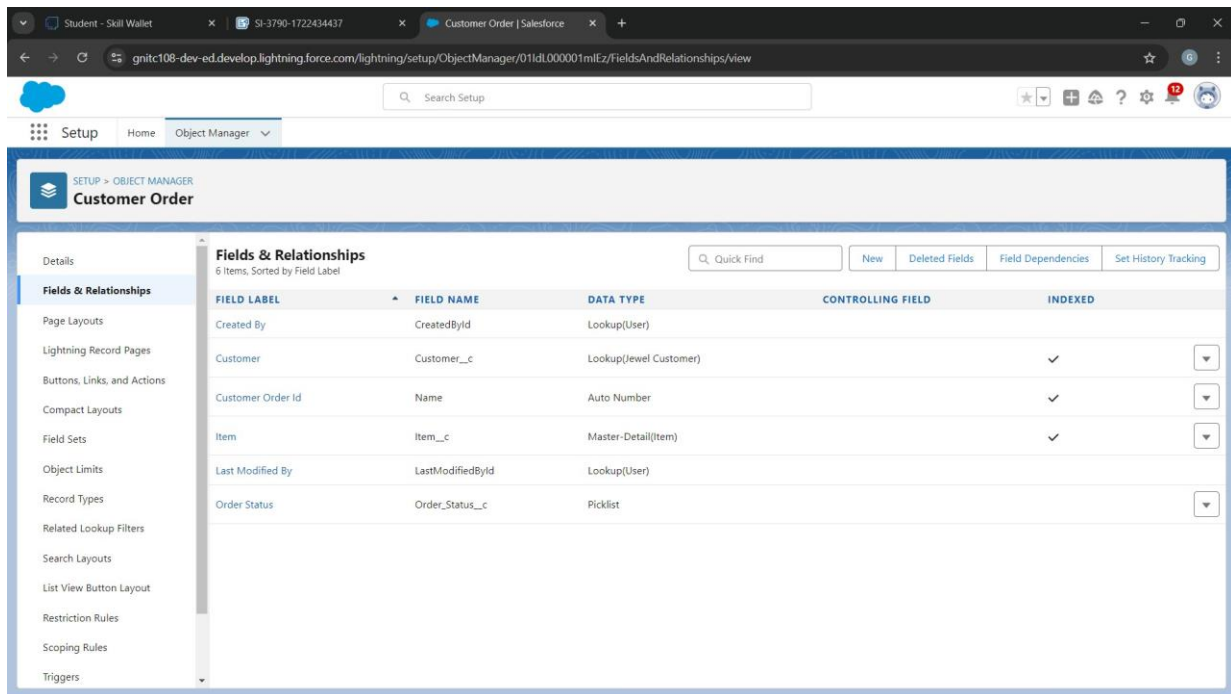
Now it's time for you to think out of the box for your organisation. You have successfully created the database objects for the organisation but now all eyes turn on you as you have to define what sort of information the objects store which you have created. As a life saver of your organisation you come up with the idea of creating fields to store different types of data.

# 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.

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 Salesforce Setup interface for the 'Customer Order' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Created By (Lookup(User)), Customer (Lookup(Jewel Customer)), Customer Order Id (Auto Number), Item (Master-Detail(Item)), Last Modified By (Lookup(User)), and Order Status (Picklist). The 'Customer' field is highlighted, indicating it is the selected lookup relationship.

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



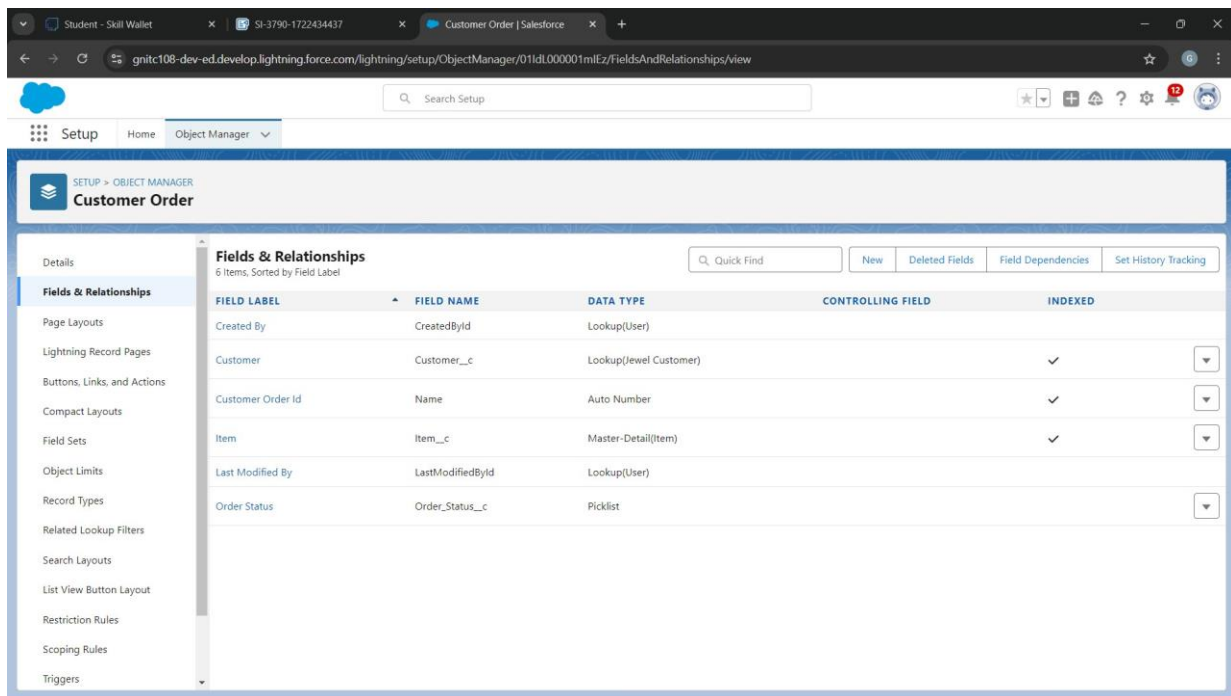
# Creating a Master-Detail Relationship

Master-detail relationship is a type of relationship between two objects where the master object controls certain behaviours and settings of the detail object. Here are a few use cases that demonstrate the use of master-detail relationships

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.



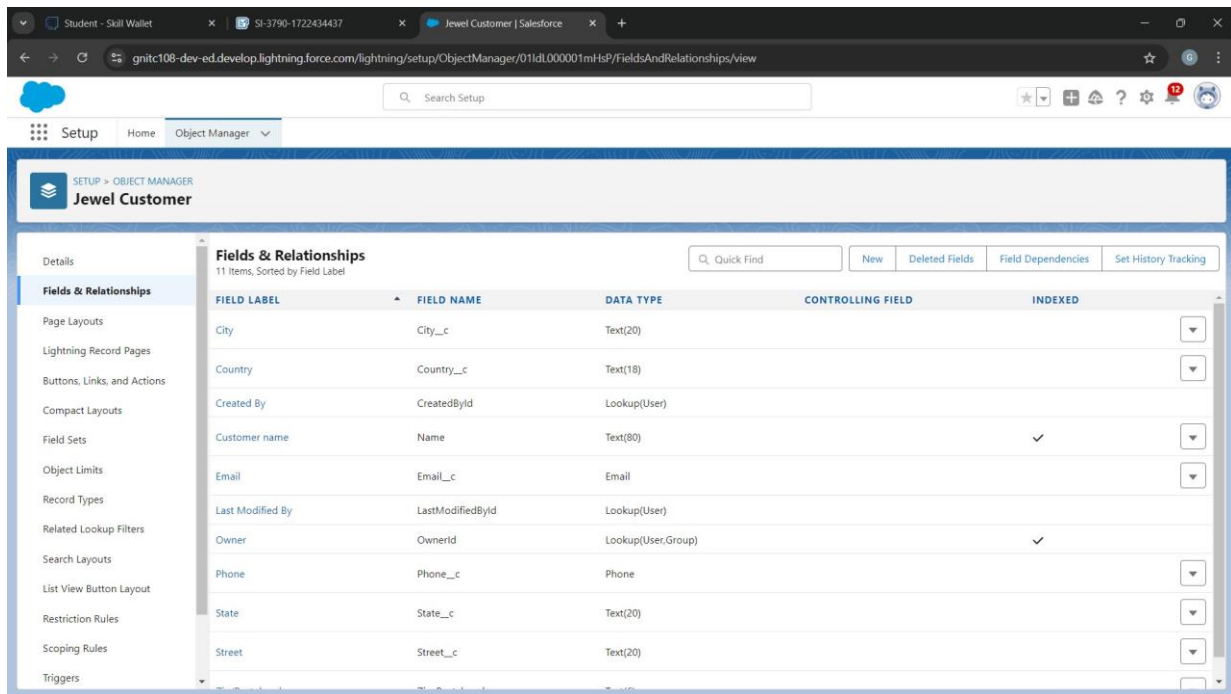
The screenshot shows the Salesforce Setup page for the 'Customer Order' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The 'Item' field is highlighted as a Master-Detail relationship.

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

# Creating Text Field in Jewel Customer Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Jewel Customer ) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" ? New
3. Select Data type as "Text".
4. Click on Next
5. Fill the above as following:
  - Field Label: City
  - Length : 20
  - Field Name : gets auto generated
  - Click on Next >> Next >> Save and new.



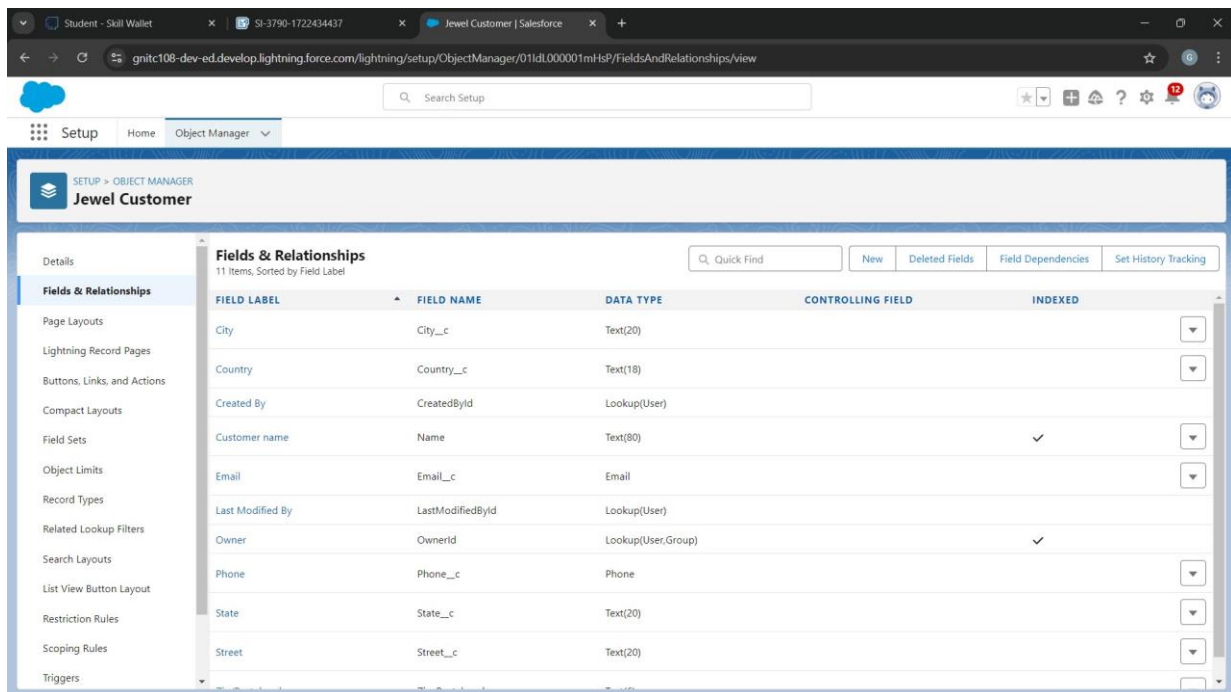
The screenshot shows the Salesforce Setup interface for the 'Jewel Customer' object. The 'Fields & Relationships' section is active, displaying a table of 11 fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

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

# Creating the Phone field in object Jewel Customer

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Jewel Customer ) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as "Phone" and click Next.
4. Given the Field Label as " Phone".

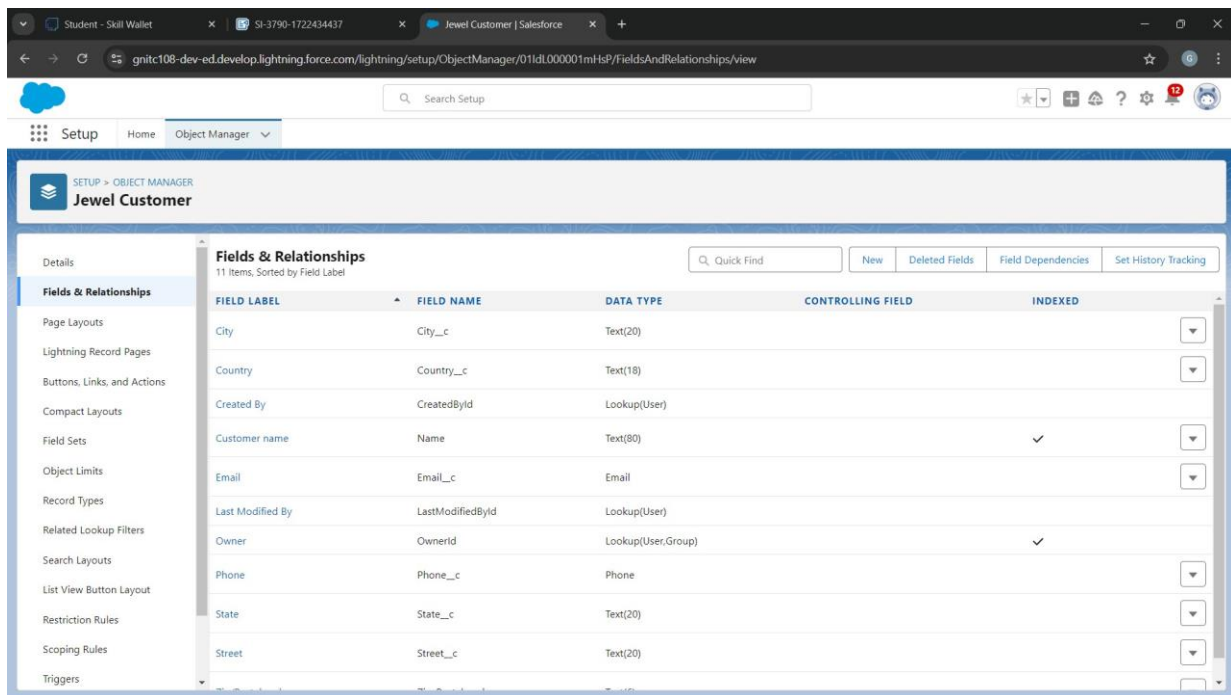


5. Field Name will be auto populated, and click on Next >> Next >> Save & new.

# Creating the Email field in object Jewel Customer

To create fields in an object:

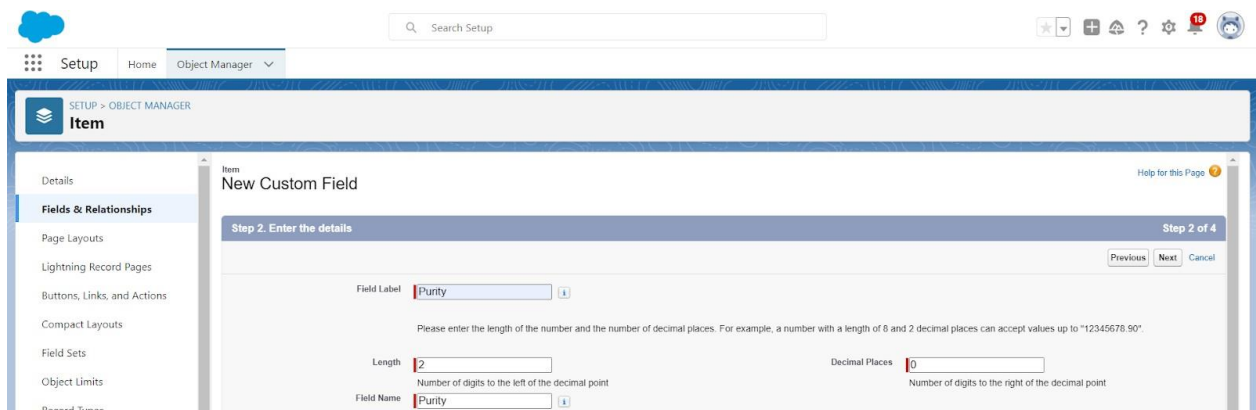
1. Go to setup >> click on Object Manager >> type object name(Jewel Customer ) in quick find bar>> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as "Email" and click Next.
4. Given the Field Label as " Email".



## Creating the number field in Item object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as "Number" and click Next.
4. Given the Field Label as "Purity" and length as "2".



5. Field Name will be auto populated, and click on Next >> Next >> Save.

# Creating Picklist Field in Item Object

To create fields in an object:

- 1.Go to setup >> click on Object Manager >>type object name(Item) in quick find bar >> click on the object.
- 2.Now click on “Fields & Relationships” >> New.
- 3.Select Data type as “Picklist” and click Next.
- 4.Enter Field Label as “Item Type”.
- 5.In values select “Enter values(Gold,Silver), with each value separated by a new line” and enter values as shown below.

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar and navigation tabs for Setup, Home, and Object Manager. The main content area is titled 'Item' and 'New Custom Field'. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The 'Fields & Relationships' section is active, showing a 'New Custom Field' wizard. The wizard is at 'Step 2 of 4: Enter the details'. The 'Field Label' is 'Item Type'. Under 'Values', the option 'Enter values, with each value separated by a new line' is selected, and the text area contains 'Gold' and 'Silver' on separate lines. Below this, there are checkboxes for 'Display values alphabetically, not in the order entered', 'Use first value as default value', and 'Restrict picklist to the values defined in the value set' (which is checked). The 'Field Name' is 'Item\_Type'.

6. Click Next >> Next >> Next >> Save

# Creating Currency Field in Price Object

To create fields in an object:

- 1.Go to setup >> click on Object Manager >> type object name(Price) in quick find bar >> click on the object.
- 2.Now click on “Fields & Relationships” >> New.
3. Select Data type as “Currency” and click Next.

The screenshot shows the Salesforce Setup interface for defining a custom field. The breadcrumb trail is: SETUP > OBJECT MANAGER > Price. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area is titled 'Price Custom Field Gold Price' and includes a 'Back to Price' link. Below this, there are tabs for 'Details', 'Validation Rules', 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Details' tab is active, showing the 'Custom Field Definition Detail'.

**Field Information**

Field Label	Gold Price	Object Name	Price
Field Name	Gold_Price	Data Type	Currency
API Name	Gold_Price__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	nalam.gajanan, 29/07/2024, 11:36 am		
Modified By	nalam.gajanan, 29/07/2024, 11:36 am		

**General Options**

Required	<input type="checkbox"/>
Default Value	

**Currency Options**

Length	8
Decimal Places	5

**Validation Rules**

There is a 'New' button to add a validation rule. A 'Validation Rules Help' link is also present.

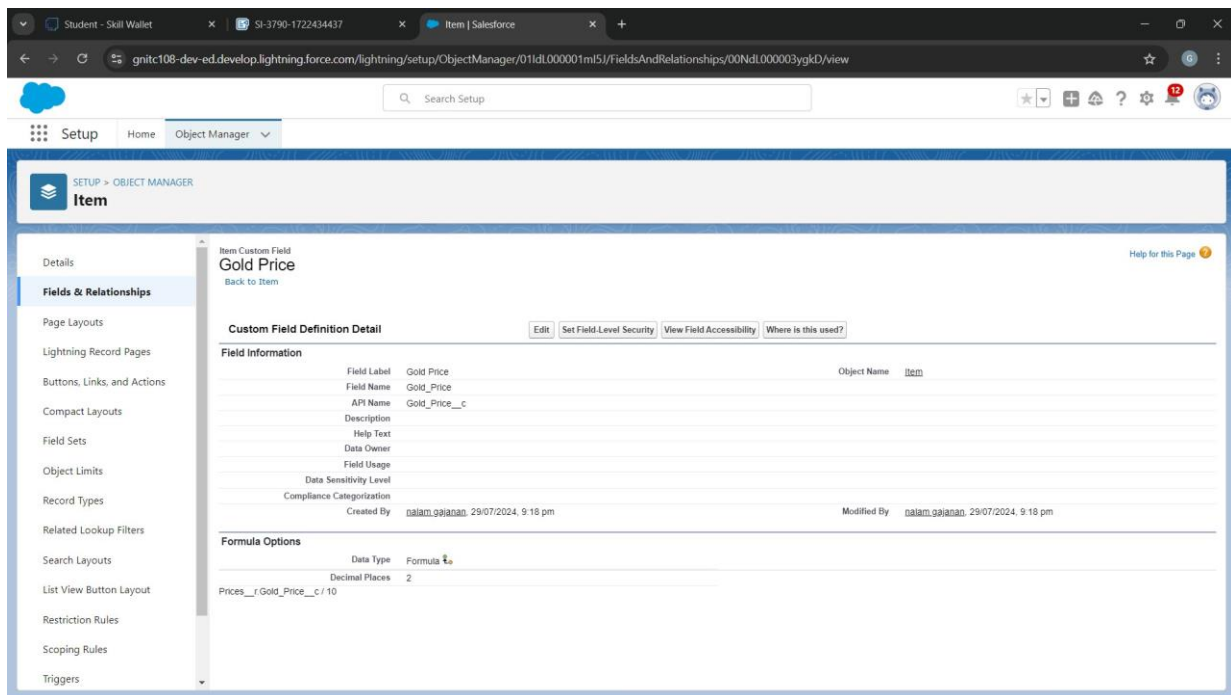
4. Enter Field Label as “Gold Price” and length as “ 8”and decimal 5.Field name will be auto generated.
- 5.Click Next >> Next >> Next >> Save .

## Creating Formula Field(Cross Object) in Item Object

To create fields in an object:

(Note:Create a Lookup Relationship in Item Object to Price Object with Field Name:Prices)

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar >> click on the object.
- 2.Now click on “Fields & Relationships” >> New.
- 3.Select Data type as “Formula” and click Next.
- 4.Give Field Label and Field Name as “Gold Price” and select formula return type as “Currency” and click next.
- 5.Under Advanced Formula write down the formula :Prices\_r.Gold\_price\_c / 10.
- 6.Click “Check Syntax” and Next >> Next >> Save & New.



## Creating Remaining Fields in Objects

Now create the remaining fields using the data types mentioned.

s.no	Object name	Fields	
1	Jewel Customer	Field Name	Data type
		State	Text(20)
		Street	Text(20)
		Country	Text(18)
		Zip/Postal code	Text(6)

# 1.Fields for Jewel Customer

The screenshot shows the Salesforce Setup interface for the 'Jewel Customer' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), 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, and Triggers. The main content area is titled 'Fields & Relationships' and shows 11 items sorted by Field Label. The table lists the following fields:

Field Label	Field Name	Field Type	Required	Actions
City	City__c	Text(20)		
Country	Country__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Customer name	Name	Text(80)	✓	
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)	✓	
Phone	Phone__c	Phone		
State	State__c	Text(20)		
Street	Street__c	Text(20)		
Zip/Postal code	Zip_Postal_code__c	Text(6)		

# 2.Fields for Item

The screenshot shows the Salesforce Setup interface for the 'Item' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), 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, and Triggers. The main content area is titled 'Fields & Relationships' and shows 23 items sorted by Field Label. The table lists the following fields:

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



2	Item		
		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 <div>1-3 Days 4-5 Days 6-7 Days 8-10 Days</div>
		Priority	Picklist <div>Low Medium High Critical</div>
		Silver Price	Formula (Return Type: Number) (Decimal=3) <div>(Prices_r.Silver_price__c / 1000)</div>
		Purity Gold Price	Formula (Return Type: Currency) (Decimal=2) <div>((Prices_r.Gold_price__c * Purity__c) / 24) / 10</div>

		Purity Gold Price	Formula (Return Type:Currency) (Decimal=2) <div>((Prices_r.Gold_price__c * Purity__c ) / 24) / 10</div>
		Total Weight	Formula (Return Type:Number) (Decimal=3) <div>(Weight_c - Stone_weight__c)</div>
		Amount	Formula (Return Type:Currency) (Decimal=3) <div>IF(ISPICKVAL( Item_Type_c ,"Gold"), Total_weight_c * Purity_Gold_price_c , Total_weight_c * Silver_price_c )</div>
		KDM	Formula (Return Type:Currency) (Decimal=0) <div>(Amount_c * Percentage__c ) / 100</div>

		Making Charges	Formula (Return Type:Currency) (Decimal=0) <div>IF(ISPICKVAL( Item_Type_c ,"Gold"), Weight_c * 300 , Weight_c * 10 )</div>

### 3.Fields for Price

3	Price		
		Silver Price	Currency (Length=8,Decimal=5)

Student - Skill Wallet

SI-3790-1722434437

Price | Salesforce

gnitc108-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001mILD/FieldsAndRelationships/view

Search Setup

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

Triggers

Fields & Relationships

6 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Gold Price	Gold_Price__c	Currency(8, 5)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Price	Name	Auto Number		✓
Silver Price	Silver_Price__c	Currency(8, 5)		

## 4.Fields for Customer Order

4	Customer Order	<table><tr><td>Order Status</td><td>Picklist</td></tr><tr><td></td><td><div>Started Not StartedOn Hold Completed Not Completed</div></td></tr></table>	Order Status	Picklist		<div>Started Not StartedOn Hold Completed Not Completed</div>
Order Status	Picklist					
	<div>Started Not StartedOn Hold Completed Not Completed</div>					

gnitc108-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ld.000001mlEz/FieldsAndRelationships/view				
Search Setup				
Setup Home Object Manager				
Customer Order				
Details	Fields & Relationships			
Fields & Relationships	6 Items, Sorted by Field Label			
Page Layouts	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD INDEXED
Lightning Record Pages	Created By	CreatedById	Lookup(User)	
Buttons, Links, and Actions	Customer	Customer__c	Lookup(Jewel Customer)	✓
Compact Layouts	Customer Order Id	Name	Auto Number	✓
Field Sets	Item	Item__c	Master-Detail(Item)	✓
Object Limits	Last Modified By	LastModifiedById	Lookup(User)	
Record Types	Order Status	Order_Status__c	Picklist	
Related Lookup Filters				
Search Layouts				
List View Button Layout				
Restriction Rules				
Scoping Rules				
Triggers				

5

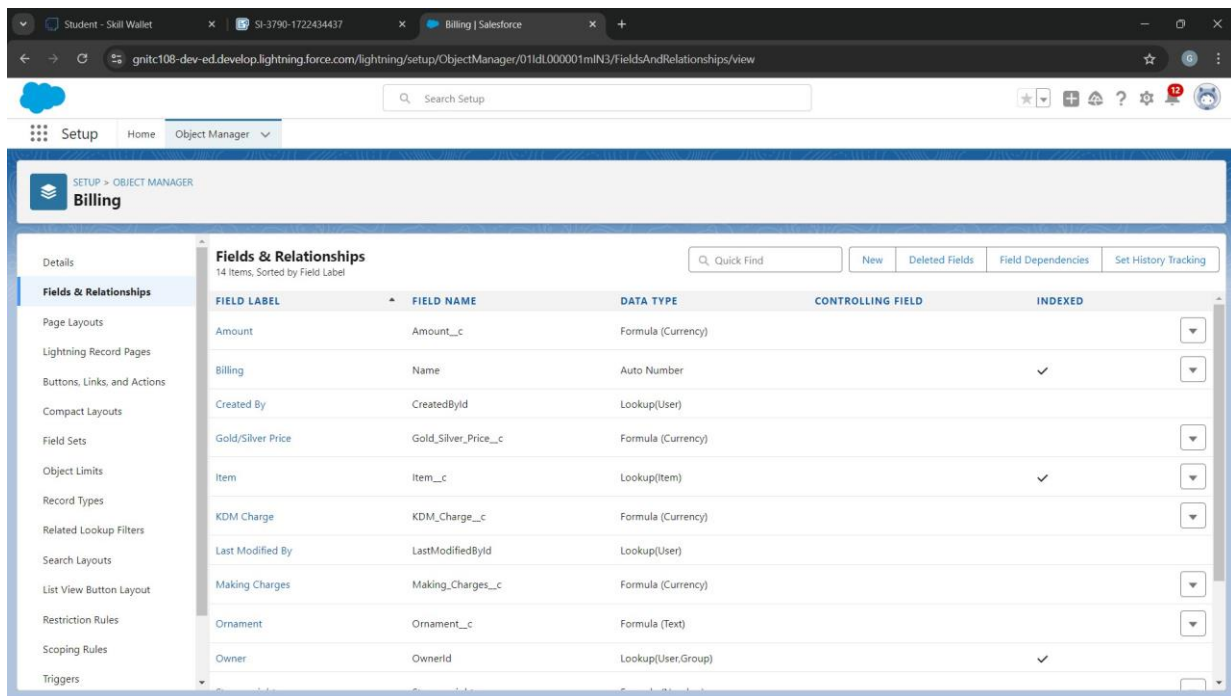
Billing

Field Label:Item	Lookup Relationship with Item Object
Ornament	Formula (Return Type:Text) <div>Item_r.Ornament__c</div>
Stone weight	Formula (Return Type:Number) (Decimal=2) <div>Item_r.Stone_weight__c</div>
Weight	Formula Return Type:Number (Decimal=2) <div>Item_r.Total_weight__c</div>
Amount	Formula (Return Type:Currency) (Decimal=2) <div>Item_r.Amount_c</div>
Gold/Silver Price	Formula (Return Type:Currency) (Decimal=2) <div>IF(ISPICKVAL( Item_r.Item_Type_c ,"Gold"), Item_r.Gold_price_c ,</div>

		<div>Item_r.Silver_price__c )</div>
KDM Charge	Formula (Return Type:Currency) (Decimal=0) <div>Item_r.KDM_c</div>	
Making Charges	Formula (Return Type:Currency) (Decimal=2) <div>Item_r.Making_Charges_c</div>	
Stones/other price	Formula (Return Type:Currency) (Decimal=2) <div>Item_r.Stone_other_price__c</div>	
Total Amount	Formula (Return Type:Currency) (Decimal=0) <div>Amount_c + KDM_Charge__c + Stones_other_price_c + Making_Charges_c</div>	



## 5.Fields for Billing



The screenshot shows the Salesforce Setup interface for the Billing object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, and Triggers. The main content area is titled 'Fields & Relationships' and shows a table of 14 items, sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Amount, Billing, Created By, Gold/Silver Price, Item, KDM Charge, Last Modified By, Making Charges, Ornament, and Owner.

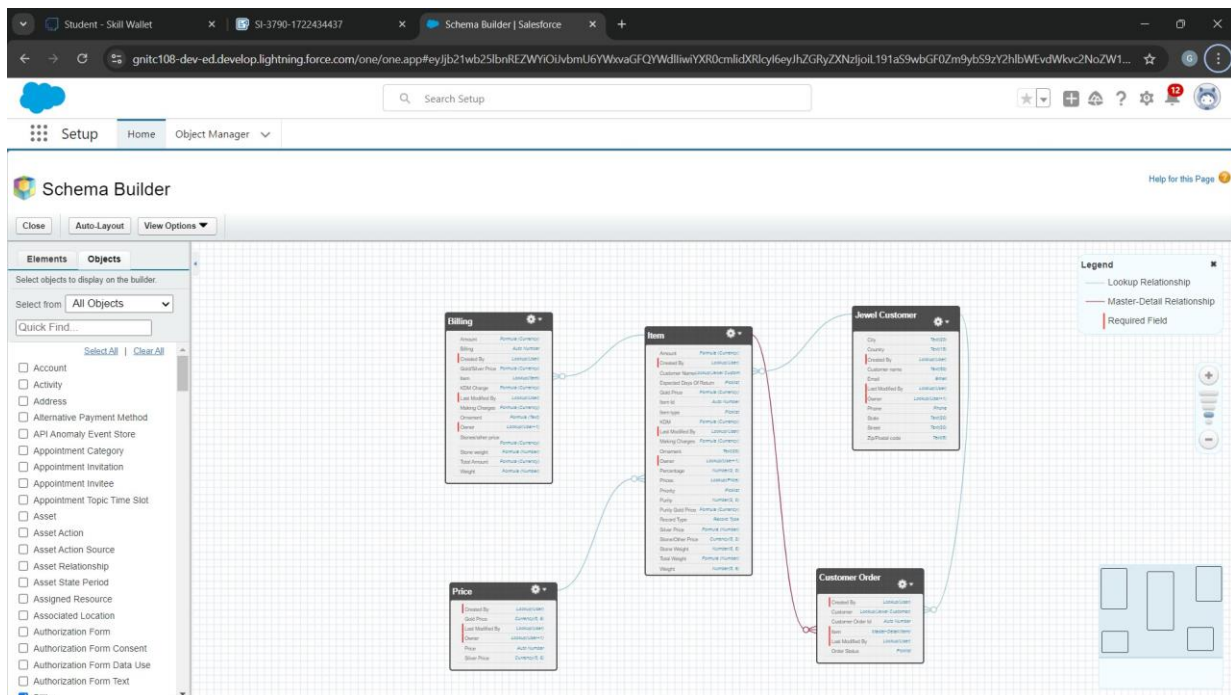
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Billing	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Gold/Silver Price	Gold_Silver_Price__c	Formula (Currency)		
Item	Item__c	Lookup(Item)		✓
KDM Charge	KDM_Charge__c	Formula (Currency)		
Last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

## 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.

Creating Schema Builder

1. Go to setup >> click on Object Manager >> Schema Builder.
2. Select objects >> Enter Objects as “Jewel Customer,Item,Customer Order, Price, Billing objects” in quick box and select them.



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

**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--

Continue Cancel

# 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))  
)
```

5. 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.

## ***Create One more Validation rule for Jewel Customer object.***

1. Enter Rule name as "ValidationRule For JewelCustomerObject ". 2. Insert

the Error Condition Formula as :-

```
OR( ISBLANK( City_c ) , ISBLANK( Country_c ), ISBLANK( Phone_c ), ISBLANK( State_c ), ISBLANK(Street  
c ) )
```

3. 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.***

1. Enter Rule name as "ValidationRule For Item".

2. Insert the Error Condition Formula as :- OR( ISBLANK( Amount\_c ) , ISBLANK( Customer\_Name\_\_c ) , ISBLANK( Gold\_price\_\_c ), ISBLANK( KDM\_\_c ), ISBLANK( Ornament\_\_c ), ISBLANK( Percentage\_\_c ), ISBLANK( Making\_Charges\_c ), ISBLANK( Prices\_c ), ISBLANK( Stone\_weight\_c ), ISBLANK( Silver\_price\_c ), ISBLANK( Stone\_other\_price\_c ), ISBLANK( Stone\_weight\_c ), ISBLANK( Weight\_c ) )

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



- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers

Validation Rules

Error and try again.

Validation Rule Edit

Save Save & New Cancel

Rule Name **Postal Code**

Active ☒

Description

Error Condition Formula

Example: `Discount_Percent__c > 0.30` [More Examples...](#)

Display an error if Discount is more than 30%

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

Insert Field

Insert Operator

```
AND(  
  OR(  
    LEN( Zip_Postal_code__c ) <> 6,  
    NOT( REGEX( Zip_Postal_code__c, "^[0-9]{6}$" ) )  
  ),  
  NOT( ISBLANK( Zip_Postal_code__c ) )  
)
```

Check Syntax No errors found

Functions

-- All Function Categories --

ABS  
ACOS  
ADDMONTHS  
AND  
ASCII  
ASIN

Insert Selected Function

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

[Help on this function](#)

Error Message

Example: `Discount percent cannot exceed 30%`

This message will appear when Error Condition formula is true

Error Message **Must contain 6 digits**

This error message can either appear at the top of the page or below a specific field on the page

Error Location ☐ Top of Page ☒ Field **Zip/Postal code**

Save Save & New Cancel

# Task 7 :

## Profiles

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

## Gold Smith Profile

To create a new profile:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (System Administrator) >> enter profile name (Gold Smith) >> Save.
2. 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 .
4. Scroll down and Click on Save.

The screenshot shows the Salesforce Setup interface for the 'Gold Smith' profile. The browser address bar indicates the URL: `gnitc108-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00ed1.000005FzWX`. The left sidebar shows the 'Setup' menu with 'Profiles' selected. The main content area displays the 'Gold Smith' profile details, including a list of permissions and page layouts.

**Profile Detail**

Name	User License	Description	Created By	Modified By
Gold Smith	Salesforce		nalam.gajanan, 31/07/2024, 7:13 pm	nalam.gajanan, 31/07/2024, 8:15 pm

**Page Layouts**

Standard Object Layouts	Location Group Assignment
Global: Global Layout [View Assignment]	Location Group Assignment Layout [View Assignment]
Email Application: Not Assigned [View Assignment]	Macro: Macro Layout [View Assignment]
Home Page Layout: DE Default [View Assignment]	Object Milestone: Object Milestone Layout [View Assignment]
Account: Account Layout [View Assignment]	Operating Hours: Operating Hours Layout [View Assignment]
Alternative Payment Method: Alternative Payment Method Layout [View Assignment]	Opportunity: Opportunity Layout [View Assignment]
Appointment Invitation: Appointment Invitation Layout [View Assignment]	Opportunity Product: Opportunity Product Layout [View Assignment]
Asset: Asset Layout [View Assignment]	Order: Order Layout [View Assignment]

# Worker Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Salesforce Platform User) >> enter profile name as worker profile>> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Items,Price and Customer Order objects.
4. Scroll down and Click on Save.

The screenshot shows the Salesforce Setup interface for the 'worker' profile. The left sidebar contains the 'Setup' menu with 'Profiles' selected. The main content area displays the 'worker' profile details, including its name, user license, and page layouts. The 'Page Layouts' section is expanded, showing a grid of layouts for various objects. The 'Standard Object Layouts' section includes layouts for Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, and Asset. The 'Custom Object Layouts' section includes layouts for Lead, Location, Location Group, Location Group Assignment, Object Milestone, Operating Hours, and Order. The 'Profile Detail' section shows the profile was created by 'nalam.gajanan' on 31/07/2024 at 7:15 pm and modified by the same user on 31/07/2024 at 8:15 pm. The 'Page Layouts' section shows the following layouts assigned to the profile:

Object	Layout
Global	Global Layout [View Assignment]
Lead	Lead Layout [View Assignment]
Email Application	Not Assigned [View Assignment]
Location	Location Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]
Location Group	Location Group Layout [View Assignment]
Account	Account Layout [View Assignment]
Location Group Assignment	Location Group Assignment Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]
Object Milestone	Object Milestone Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]
Operating Hours	Operating Hours Layout [View Assignment]
Asset	Asset Layout [View Assignment]
Order	Order Layout [View Assignment]

## Task 8 :

### Roles

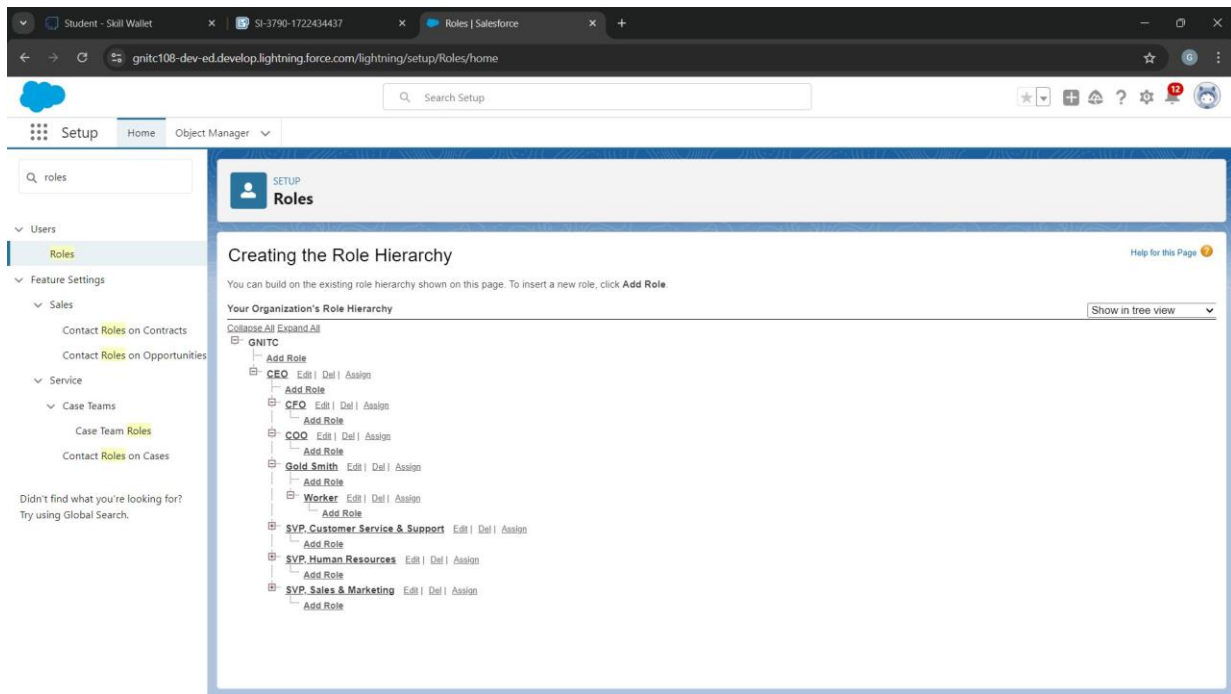
A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organisation can have to data. Simply put, it describes what a user could see within the Salesforce organisation.

### Creating Gold Smith Role

1. From setup >> Go to quick find >> Search for Roles >> click on set up roles.
2. Click on Expand All and click on add role under whom this role works.
3. Give Label as "Gold Smith" and Role name gets auto populated. Check to whom this role (Gold Smith) reports. Then click on Save.

Note:

Create one more role as Worker which reports to Gold Smith.



The screenshot shows the Salesforce Setup interface for Roles. The left sidebar contains a search bar with "roles" and a navigation menu with categories like Users, Feature Settings, Sales, Service, and Case Teams. The main content area is titled "Roles" and "Creating the Role Hierarchy". It displays a tree view of the organization's role hierarchy. The hierarchy starts with "GNITC" at the top, followed by "CEO", "COO", "Gold Smith", "Worker", and "SVP" roles. Each role has an "Add Role" button next to it. The "Gold Smith" role is highlighted, and the "Worker" role is shown as a child of "Gold Smith".

```
graph TD
    GNITC[GNITC] --> CEO[CEO]
    GNITC --> COO[COO]
    GNITC --> Gold_Smith[Gold Smith]
    GNITC --> Worker[Worker]
    GNITC --> SVP_Customer_Service[SVP Customer Service & Support]
    GNITC --> SVP_Human_Resources[SVP Human Resources]
    GNITC --> SVP_Sales_Marketing[SVP Sales & Marketing]
```

## Task 9 :

### Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

### Create User-1

The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Users' and displays the 'User Detail' for 'Niklaus Mikaelson'. The user's profile is shown with fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Federation ID, App Registration: One-Time Password Authenticator, App Registration: Salesforce, Role, User License, 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, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, and Send Apex Warning Emails. The user is currently active and has the role of 'Gold Smith'.

User Detail	
Name	Niklaus Mikaelson
Alias	gajanan
Email	gajanannalam406@gmail.com
Username	gajanannalam4066@gmail.com
Nickname	User17224339295511383569
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	
Manager	
Receive Approval Request Emails	Only if I am an approver
Federation ID	
App Registration: One-Time Password Authenticator	
App Registration: Salesforce	
Role	Gold Smith
User License	Salesforce
Profile	Gold Smith
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	<a href="#">View</a>
Data.com User Type	<a href="#">1</a>
Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">1</a>
Debug Mode	<input type="checkbox"/> <a href="#">1</a>
High-Contrast Palette on Charts	<input type="checkbox"/> <a href="#">1</a>
Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> <a href="#">1</a>
Send Apex Warning Emails	<input type="checkbox"/>



# Create User-2

The screenshot shows the Salesforce Setup interface for creating a new user. The browser address bar displays the URL: `gnitc108-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005dL000005qf5p%3FnoRedirect%3D1%26isUserEntityOverride%3D1`. The left sidebar contains the navigation menu with 'Users' selected. The main content area shows the 'User Detail' for 'Kol Mikaelson'.

**User Detail**

Name	Kol Mikaelson	Role	Worker
Alias	Vamshi	User License	Salesforce Platform
Email	pajanannalam406@gmail.com	Profile	Worker
Username	pajanannalam401@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17224342638845710052	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">1</a>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">1</a>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> <a href="#">1</a>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> <a href="#">1</a>
App Registration: One-Time Password Authenticator	<a href="#">1</a>	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> <a href="#">1</a>
App Registration: Salesforce Authenticator	<a href="#">1</a>	Salesforce CRM Content User	<input checked="" type="checkbox"/>

## Task 10 :

### Page layouts

Page Layout in Salesforce allows us to customise the design and organise detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

### Gold Page layout

The screenshot shows the Salesforce Page Layout editor for the 'Gold' object. The interface includes a left sidebar with navigation options like 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Search Layouts', 'List View Button Layout', 'Restriction Rules', 'Scoping Rules', and 'Triggers'. The main area displays the 'Page Layout for Gold' with a table of fields and sections. The table lists fields such as 'Customer Name', 'Item type', 'Ornament', 'Priority', 'Silver Price', 'Weight', 'Expected Days Of ...', 'KDM', 'Owner', 'Purity', 'Stone/Other Price', 'Stone Weight', 'Total Weight', 'Last Modified By', 'Percentage', 'Purity Gold Price', 'Record Type', 'Making Charges', 'Prices', and 'Total Weight'. Below the table, there are sections for 'Item Sample', 'Highlights Panel', 'Quick Actions in the Salesforce Classic Publisher', 'Salesforce Mobile and Lightning Experience Actions', and 'Item Detail'. The 'Item Detail' section shows 'Standard Buttons' and 'Custom Buttons'.

Fields	Customer Name	Item type	Ornament	Priority	Silver Price	Weight
Blank Space	Expected Days Of ...	KDM	Owner	Purity	Stone/Other Price	Stone Weight
Amount	Gold Price	Last Modified By	Percentage	Purity Gold Price	Record Type	Total Weight
Created By	Item Id	Making Charges	Prices			

# Silver Page layout

The screenshot shows the Salesforce Page Layout editor for the 'Silver' layout. The interface includes a sidebar with navigation options: Details, Fields & Relationships, Page Layouts (selected), 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, and Triggers.

The main area displays the 'Page Layout for Silver' with a 'Fields' section containing a table of fields:

Quick Find	Field Name	Field Name	Field Name	Field Name	Field Name	Field Name	Field Name	Field Name
Section	Customer Name	Item type	Ornament	Priority	Silver Price	Weight		
Blank Space	Expected Days Of ...	KDM	Owner	Purity	Stone/Other Price			
Amount	Gold Price	Last Modified By	Percentage	Purity Gold Price	Stone Weight			
Created By	Item Id	Making Charges	Prices	Record Type	Total Weight			

Below the fields section, there are sections for 'Highlights Panel', 'Quick Actions in the Salesforce Classic Publisher', 'Salesforce Mobile and Lightning Experience Actions', and 'Item Detail'.

## Task 12 :

### Record Types

Record Types are a way of grouping many records of one type for that object. These can be applied to any standard or custom object, and allow you to have a different page layout, fields, required fields, and picklist values. Record types allow administrators to create a different page layout with custom picklist fields and values for the same business process and various business processes.

### Create Record Type with name “Gold”

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with the following items: 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, and Triggers. The 'Record Types' section is selected and highlighted.

The main content area displays the configuration for the 'Gold' Record Type for the 'Item' object. The title is 'Record Type Gold' with a link to 'Back to Custom Object: Item'. Below the title, there is a message: '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.'

The configuration details are as follows:

Property	Value	Active
Record Type Label	Gold	<input checked="" type="checkbox"/>
Record Type Name	Gold	
Namespace Prefix		
Description	Gold Items information	
Created By	naam.gajanan	
Created Date	31/07/2024, 8:09 pm	
Modified By	naam.gajanan	
Modified Date	31/07/2024, 8:09 pm	

Below the configuration details, there is a section titled 'Picklists Available for Editing' with a link to 'Picklists Available for Editing Help'. This section contains a table with the following data:

Action	Field	Modified Date
<a href="#">Edit</a>	Expected Days Of Return	31/07/2024, 8:09 pm
<a href="#">Edit</a>	Item type	31/07/2024, 8:09 pm
<a href="#">Edit</a>	Priority	31/07/2024, 8:09 pm

# Create another Record Type with name “Silver”

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SI-3790-1722434437

Item | Salesforce

gnitc108-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000001ml5J/RecordTypes/012dL000002Ks4jQAC/view

Setup

Home

Object Manager

Item

SETUP > OBJECT MANAGER

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

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.

Edit

Record Type Label

Silver

Active

✓

Record Type Name

Silver

Namespace Prefix

Description

Created By

naiam.saijagan

31/07/2024, 8:15 pm

Modified By

naiam.saijagan

31/07/2024, 8:15 pm

Picklists Available for Editing

Picklists Available for Editing Help

Action	Field	Modified Date
Edit	Expected Days Of Return	31/07/2024, 8:15 pm
Edit	Item type	31/07/2024, 8:15 pm
Edit	Priority	31/07/2024, 8:15 pm

## Task 13 :

### Permission sets

A standard permission set consists of a group of common permissions for a particular feature associated with a permission set licence. Using a standard permission set saves you time and facilitates administration because you don't need to create the custom permission set.

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. 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.

Apps	
Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform <a href="#">Learn More</a>	<a href="#">Assigned Apps</a> Settings that specify which apps are visible in the app menu
	<a href="#">Assigned Connected Apps</a> Settings that specify which connected apps are visible in the app menu
	<a href="#">Object Settings</a> Permissions to access objects and fields, and settings such as tab availability
	<a href="#">App Permissions</a> Permissions to perform app-specific actions, such as "Manage Call Centers"
	<a href="#">Apex Class Access</a> Permissions to execute Apex classes
	<a href="#">Visualforce Page Access</a> Permissions to execute Visualforce pages
	<a href="#">External Data Source Access</a> Permissions to authenticate against external data sources
	<a href="#">Flow Access</a> Permissions to execute Flows
	<a href="#">Named Credential Access</a> Permissions to authenticate against named credentials
	<a href="#">Custom Permissions</a> Permissions to access custom processes and apps
	<a href="#">Custom Metadata Types</a> Permissions to access custom metadata types
	<a href="#">Custom Setting Definitions</a> Permissions to access custom settings

**SETUP**  
**Permission Sets**

Permission Set Overview > Object Settings ▾ Items ▾

**Items** Save Cancel

**Tab Settings**

Available	Visible
<input checked="" type="checkbox"/>	<input type="checkbox"/> <a href="#">i</a>

**Item: Record Type Assignments**

Record Types	Assigned Record Types
Gold	<input checked="" type="checkbox"/>
Silver	<input checked="" type="checkbox"/>

**Object Permissions**

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

**Field Permissions**

- Click on Save.
- After saving the permission click on the Manage assignment
- Now click on the Add Assignment.
- 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 Users to Assign

**All Users ▾**

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

Search this list...

	Full Name ↑	Alias	Username	Role	Acti...	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d5i000003ksyzea4.14i5wtjeybt4@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Integration User	integ	integration@00d5i000003ksyzea4.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Mani deepak	mdeep	manideepak143@gmail.com	Worker	<input checked="" type="checkbox"/>	Worker
<input type="checkbox"/>	Megha Katoju Site Guest User	guest	megha_katoju@00d5i000003ksyzea4.org.force.com		<input checked="" type="checkbox"/>	Megha Katoju Profile
<input type="checkbox"/>	Meghana Katoj Site Guest User	guest	meghana_katoj@00d5i000003ksyzea4.org.force.com		<input checked="" type="checkbox"/>	Meghana Katoj Profile

Cancel Next

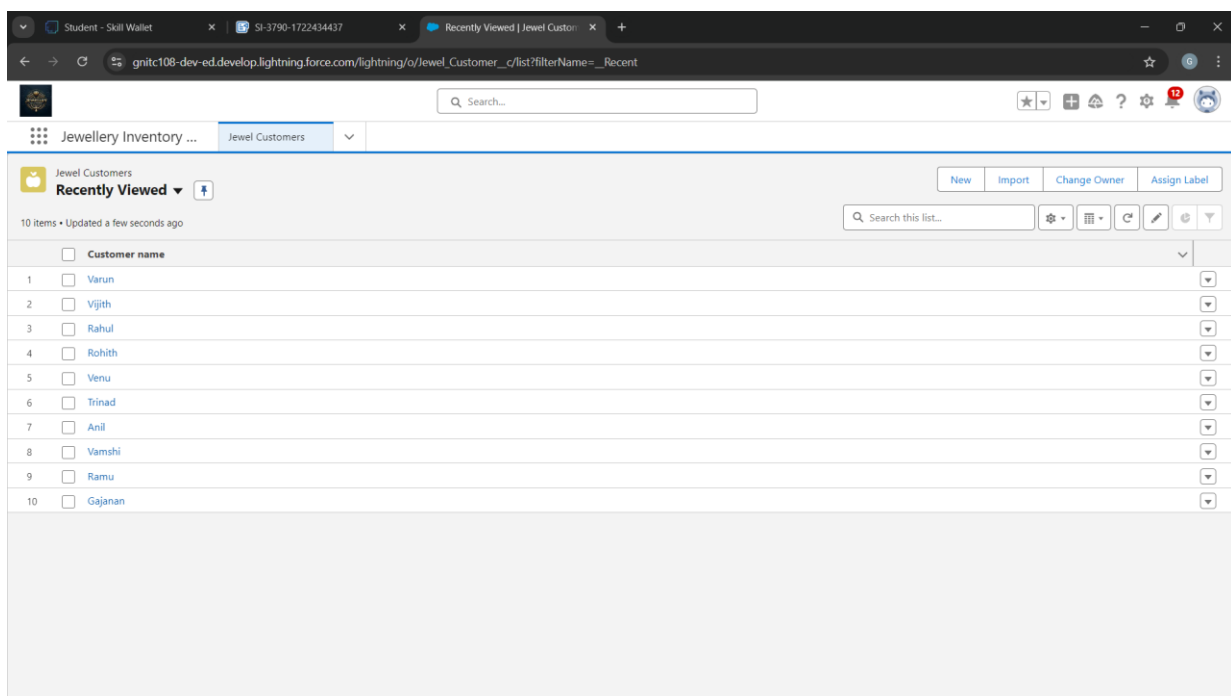
## Task 14 :

### User Adoption

Use Case:

As a new Administrator, you perform user management tasks like creating and editing users, resetting passwords, granting permissions, configuring data access, and much more. In this unit, you will learn about users and how you add users to your Salesforce org.

### Create a Record (Jewel Customer)



The screenshot displays the Salesforce interface for the 'Jewel Customers' list view. The browser address bar shows the URL: `gnitc108-dev-ed.develop.lightning.force.com/lightning/o/jewel_Customer_c/list?filterName=_Recent`. The page header includes the 'Jewellery Inventory ...' navigation menu and a search bar. The main content area shows the 'Jewel Customers' list with 10 items. The list is titled 'Recently Viewed' and includes a search bar and action buttons (New, Import, Change Owner, Assign Label). The list items are as follows:

	<input type="checkbox"/> Customer name	
1	<input type="checkbox"/> Varun	
2	<input type="checkbox"/> Vijith	
3	<input type="checkbox"/> Rahul	
4	<input type="checkbox"/> Rohith	
5	<input type="checkbox"/> Venu	
6	<input type="checkbox"/> Trinad	
7	<input type="checkbox"/> Anil	
8	<input type="checkbox"/> Vamshi	
9	<input type="checkbox"/> Ramu	
10	<input type="checkbox"/> Gajanan	



Student - Skill Wallet

Si-3790-1722434437

Rohith | Jewel Customer | Sales

gnitic108-dev-ed.develop.lightning.force.com/lightning/r/Jewel\_Customer\_.../view

☆ 6

Search...

★ + ? ⚙️ 🔔 12 🐙

Jewellery Inventory ...

Jewel Customers

Rohith | Jewel Custo...

Jewel Customer

Rohith

New Contact Edit New Opportunity

RelatedDetails

Customer name

Rohith

City

Delhi

Phone

9705108059

Email

gajannalam406@gmail.com

State

Delhi

Street

Varanasi

Country

India

Zip/Postal code

302718

Owner

nalam gajanan

Created By

nalam gajanan 03/08/2024, 12:02 pm

Last Modified By

nalam gajanan 03/08/2024, 12:02 pm

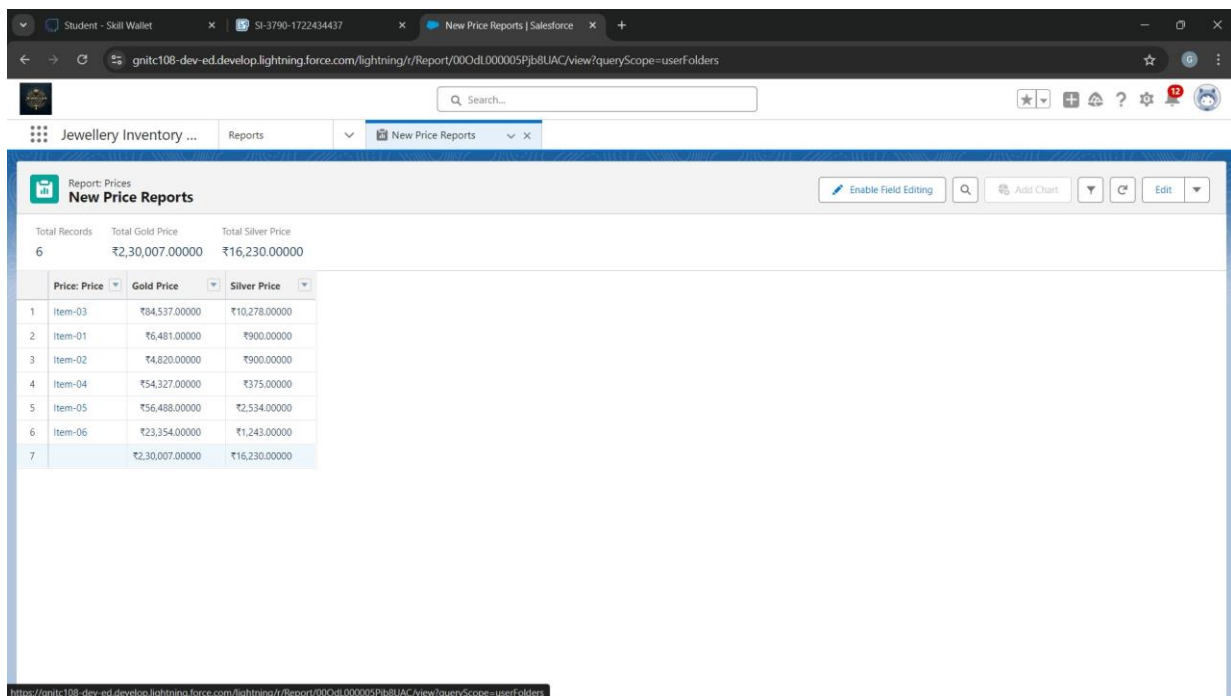
https://gnitic108-dev-ed.develop.lightning.force.com/lightning/r/Jewel\_Customer\_.../view

## Task 15 :

### Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

### Create Report (New Price Reports)



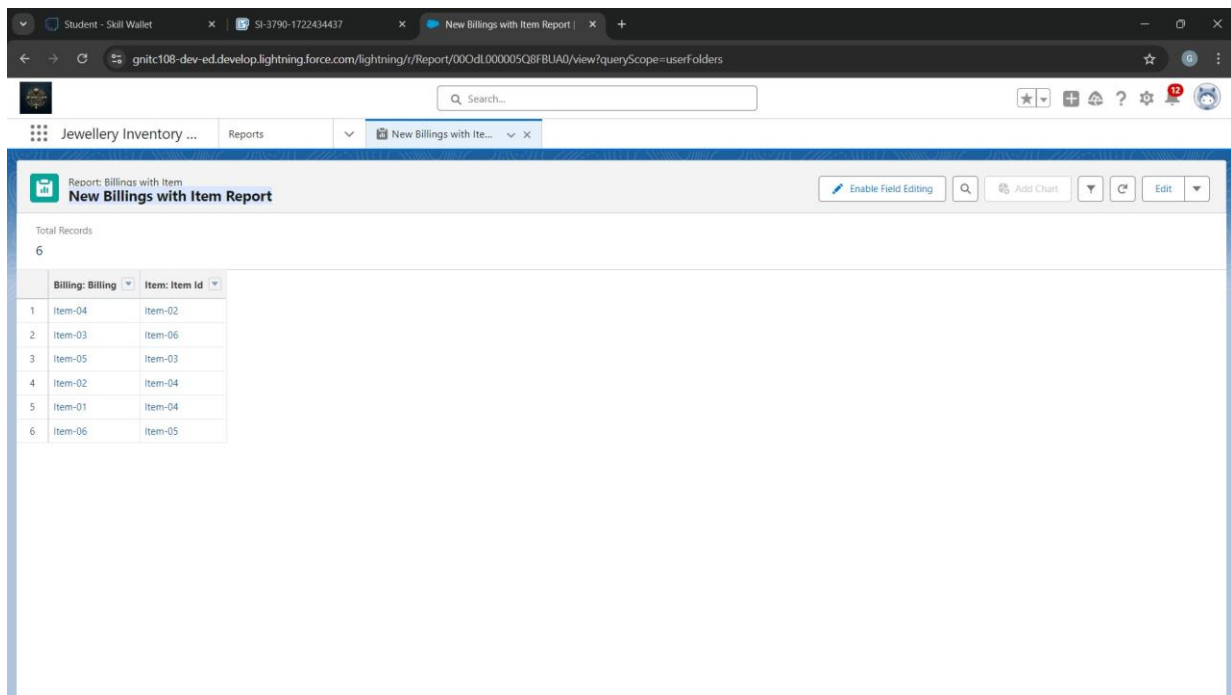
The screenshot shows a Salesforce report titled "New Price Reports" under the "Jewellery Inventory" category. The report displays a table with 6 records, showing item prices and their corresponding gold and silver prices. The table is filtered by "Price: Price" and "Gold Price". The report also includes a summary section with "Total Records", "Total Gold Price", and "Total Silver Price".

	Price: Price	Gold Price	Silver Price
1	Item-03	₹84,537.00000	₹10,278.00000
2	Item-01	₹6,481.00000	₹900.00000
3	Item-02	₹4,820.00000	₹900.00000
4	Item-04	₹54,327.00000	₹375.00000
5	Item-05	₹56,488.00000	₹2,534.00000
6	Item-06	₹23,354.00000	₹1,243.00000
7		₹2,30,007.00000	₹16,230.00000

Summary:

Total Records	Total Gold Price	Total Silver Price
6	₹2,30,007.00000	₹16,230.00000

### Create Report (New Billings With Item Report)

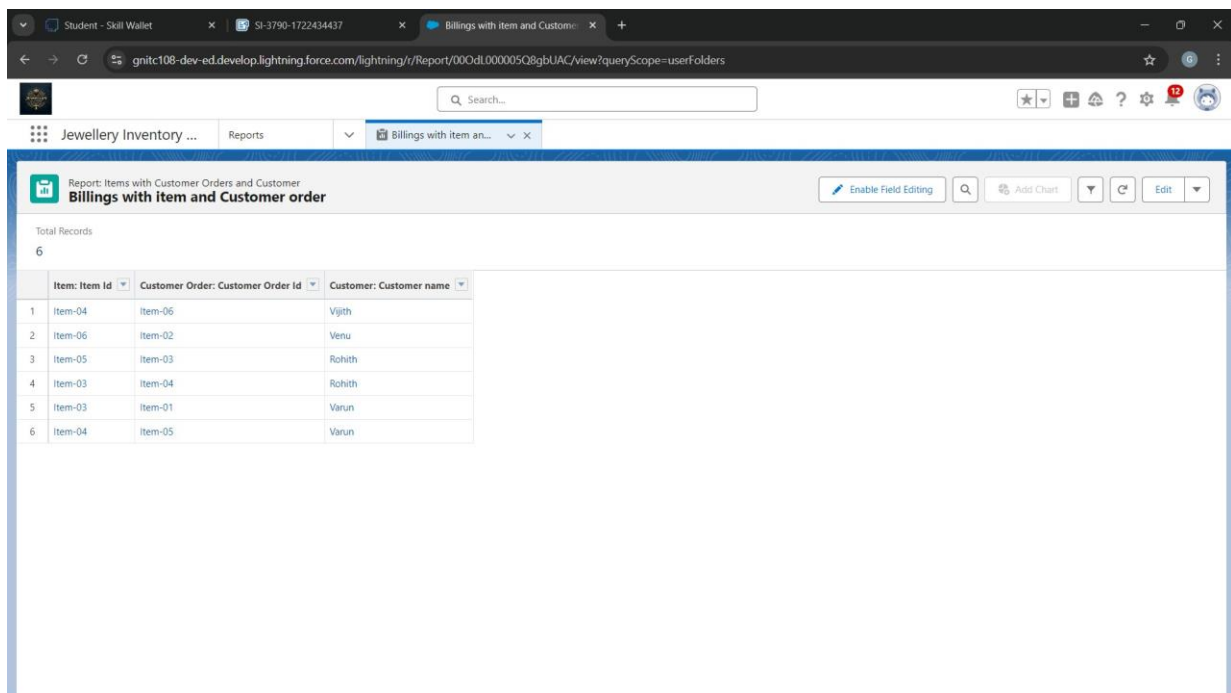


Report: Billings with Item  
**New Billings with Item Report**

Total Records: 6

	Billing: Billing	Item: Item Id
1	Item-04	Item-02
2	Item-03	Item-06
3	Item-05	Item-03
4	Item-02	Item-04
5	Item-01	Item-04
6	Item-06	Item-05

## Create Report (Billings with Items and Customer Order)



Report: Items with Customer Orders and Customer  
**Billings with item and Customer order**

Total Records: 6

	Item: Item Id	Customer Order: Customer Order Id	Customer: Customer name
1	Item-04	Item-06	Vijith
2	Item-06	Item-02	Venu
3	Item-05	Item-03	Rohith
4	Item-03	Item-04	Rohith
5	Item-03	Item-01	Varun
6	Item-04	Item-05	Varun

## Task 16 :

# Creating Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

The screenshot shows a Salesforce dashboard interface. At the top, there's a navigation bar with a search bar and several tabs: 'Jewellery Inventory ...', 'Dashboards', 'Billings with Item an...', and 'Dashboard1'. Below the navigation bar, the dashboard title 'Dashboard1' is displayed, along with a timestamp 'As of 12-Aug-2024, 4:00 pm' and a user name 'Viewing as nalam gajanan'. There are three buttons: 'Refresh', 'Edit', and 'Subscribe'. The dashboard contains three report widgets:

- New Price Reports:** A table with columns 'Price: Price ↑', 'Gold Price', and 'Silver Price'. It lists items from Item-01 to Item-06 with their respective prices.
- Billings with Item and Customer order:** A table with columns 'Item: Item Id ↑', 'Customer Order: Customer Order Id', and 'Customer: Customer name'. It lists items from Item-03 to Item-06 with their corresponding order IDs and customer names.
- New Billings with Item Report:** A table with columns 'Billing: Billing ↑' and 'Item: Item Id'. It lists items from Item-01 to Item-06 with their corresponding billing IDs.

Each report widget has a 'View Report' link below it.

## Task 17 :

### Flows

In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

