Project Name

Crm Application for Jewel Management - (admin)

By

SAMEER SYED

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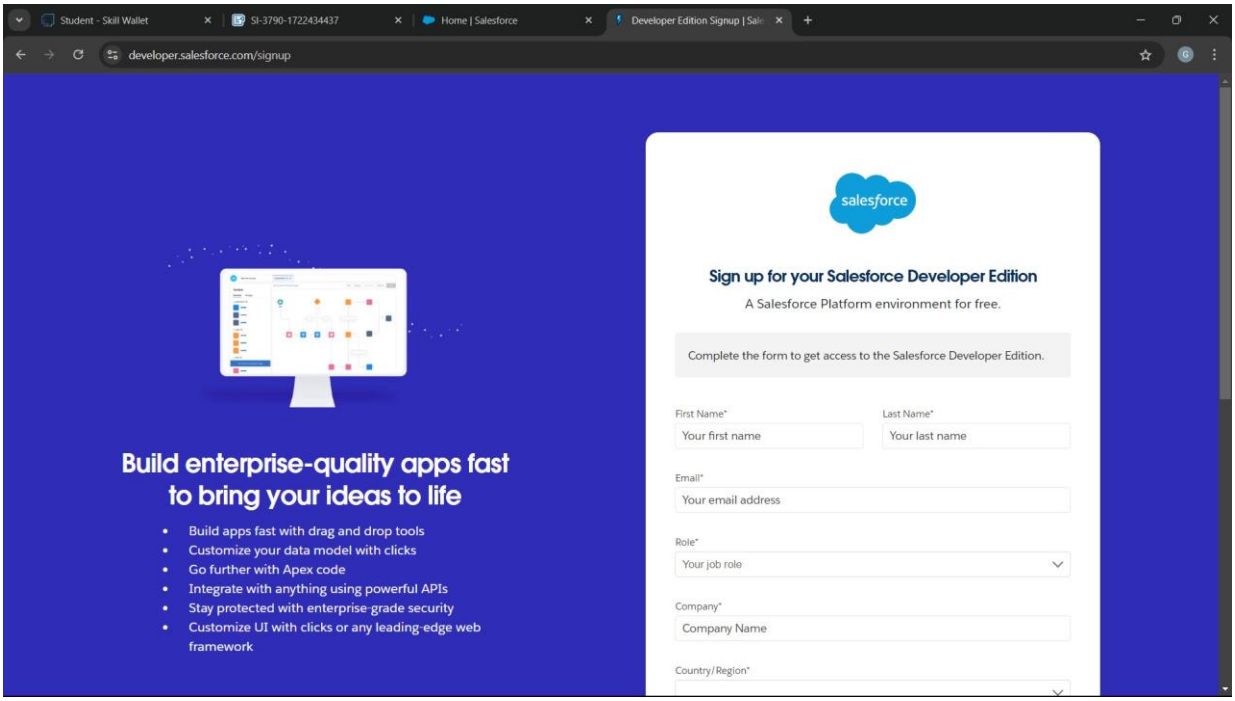
Task 1:

Creating Developer Account

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



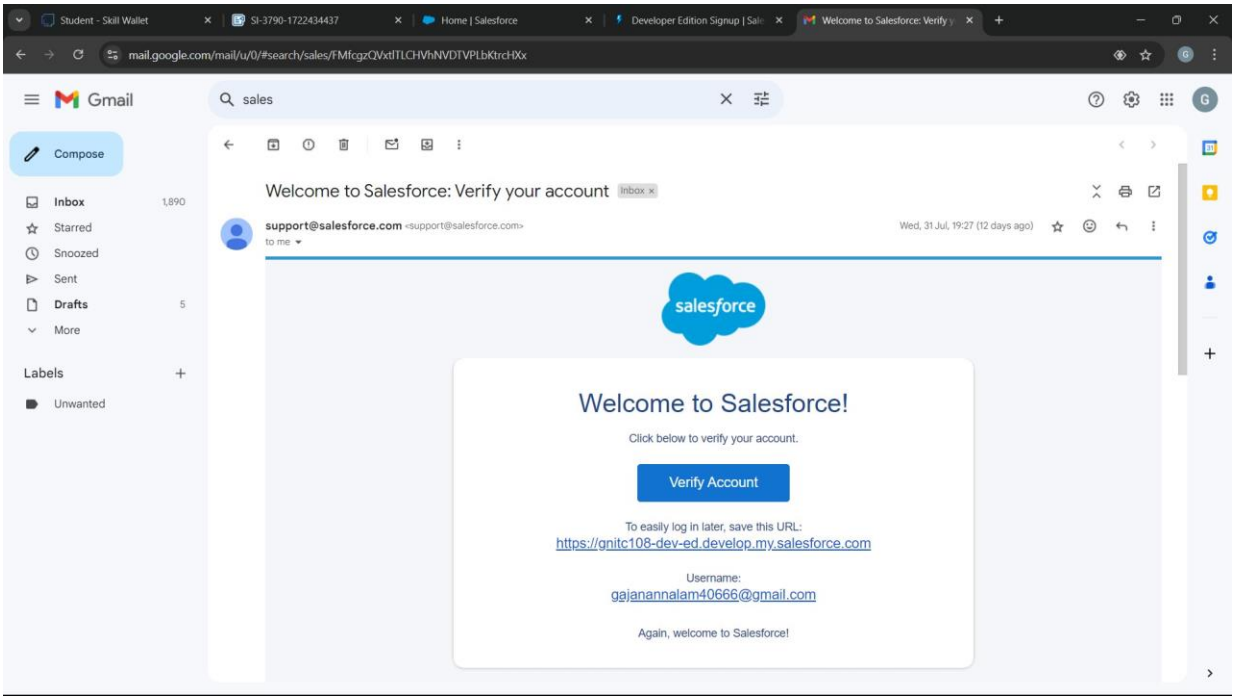
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

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

Task 2:

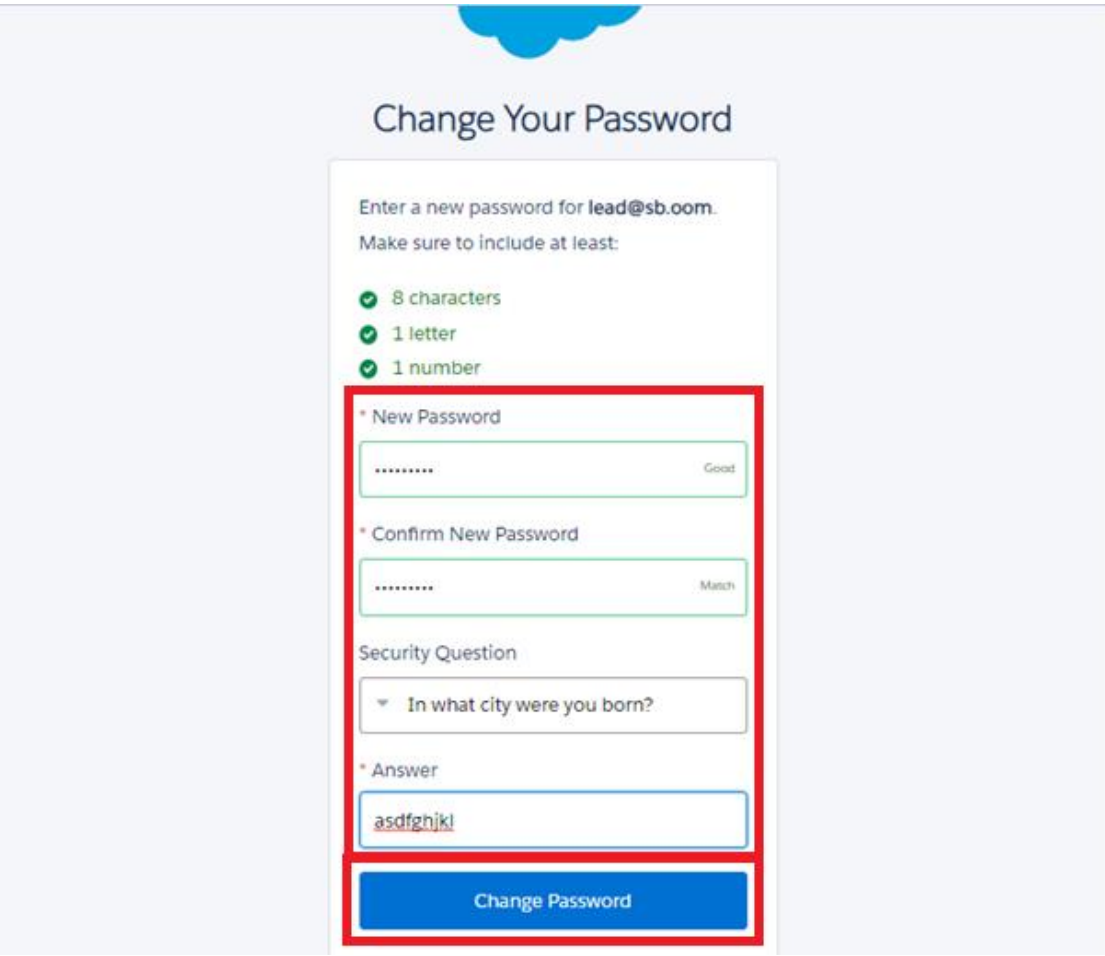
Account Activation

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.

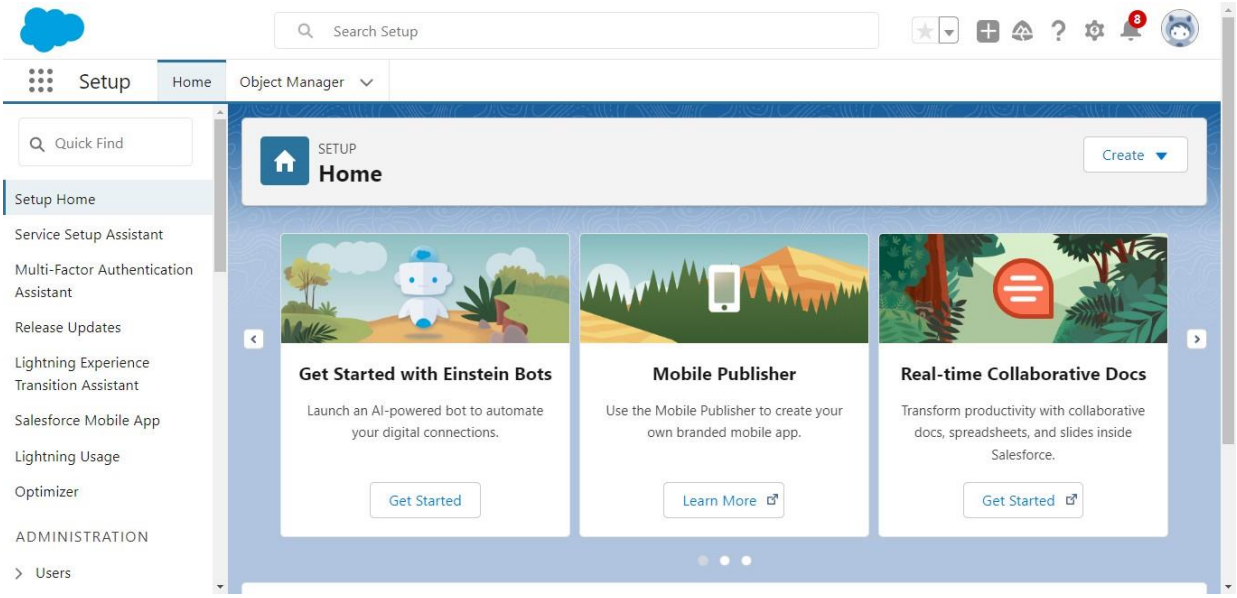


2.Click on Verify Account

3.Give a password and answer a security question and click on change password.



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



Task 3:

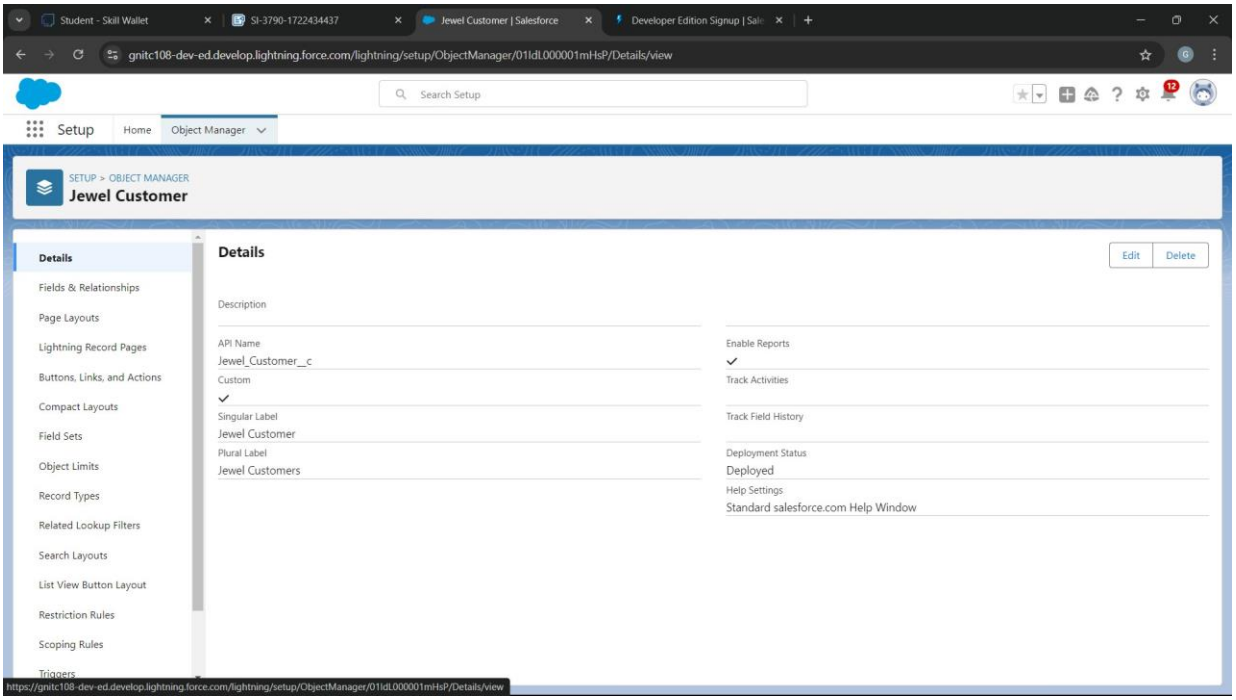
What is an Object?

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

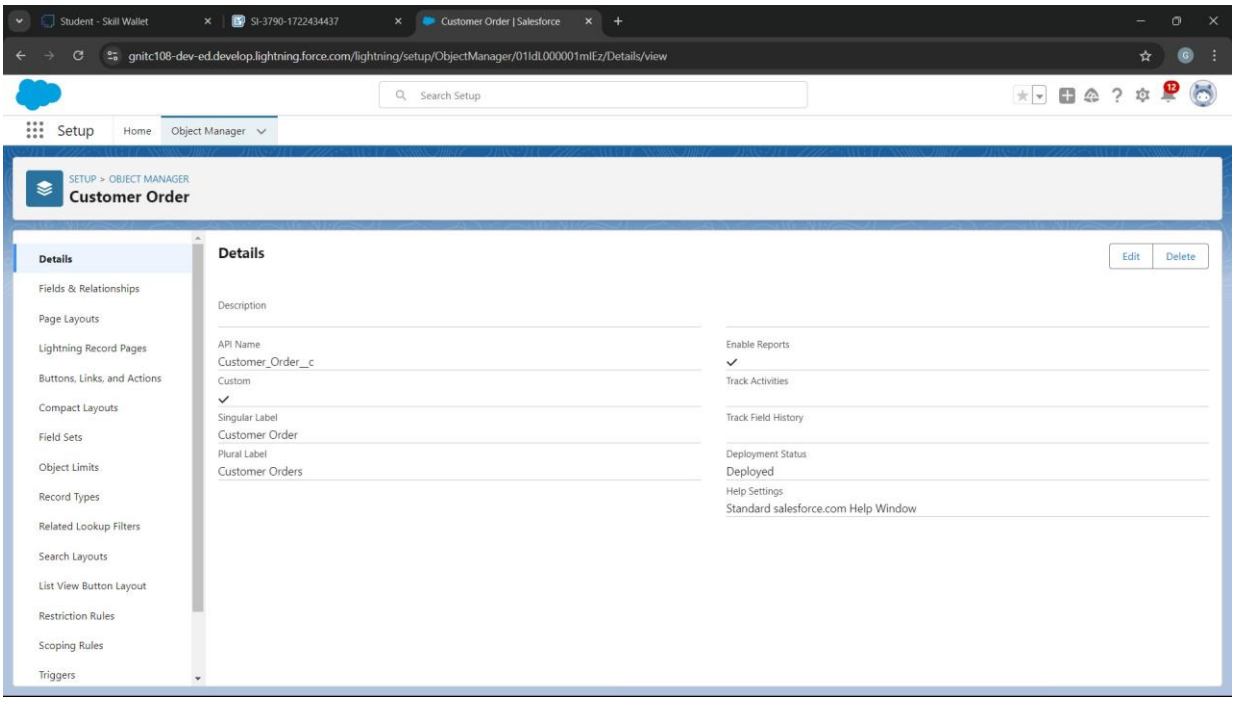
1. To create an object:
From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

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.

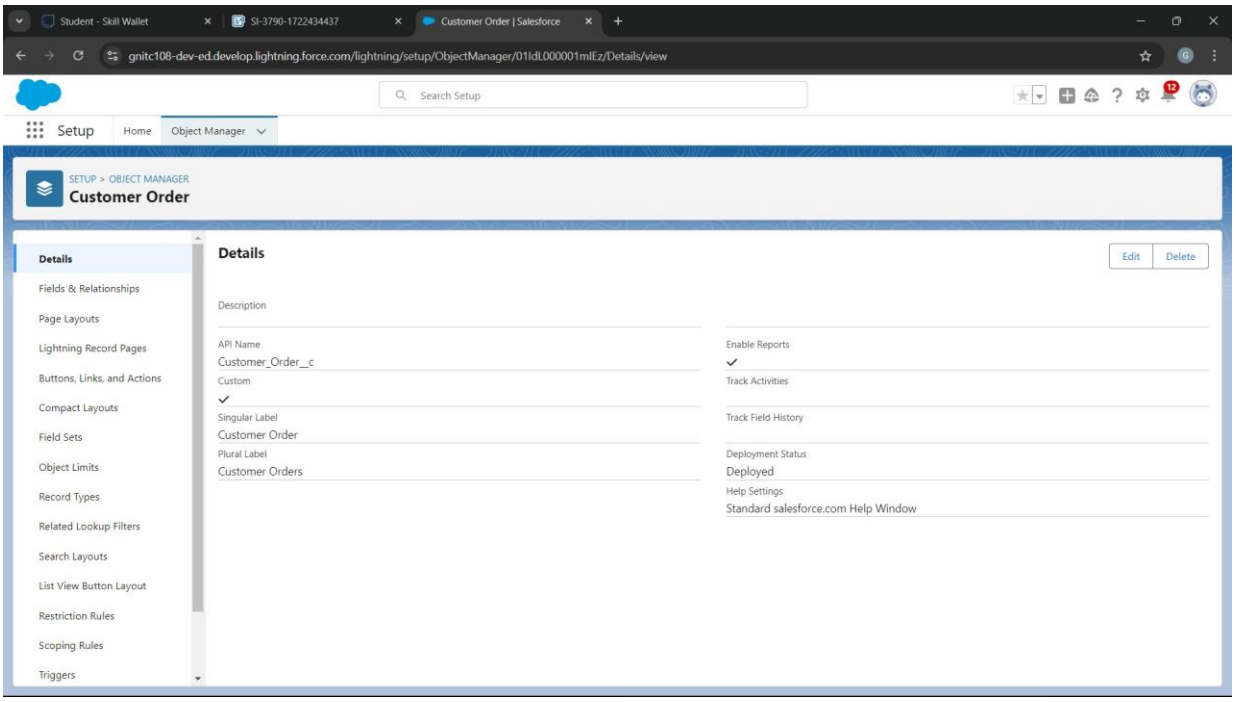


Create 3 more objects with label names as Customer Order,Price,Billing
(Use “Auto Number” as a data type for Customer Order,Price,Billing).

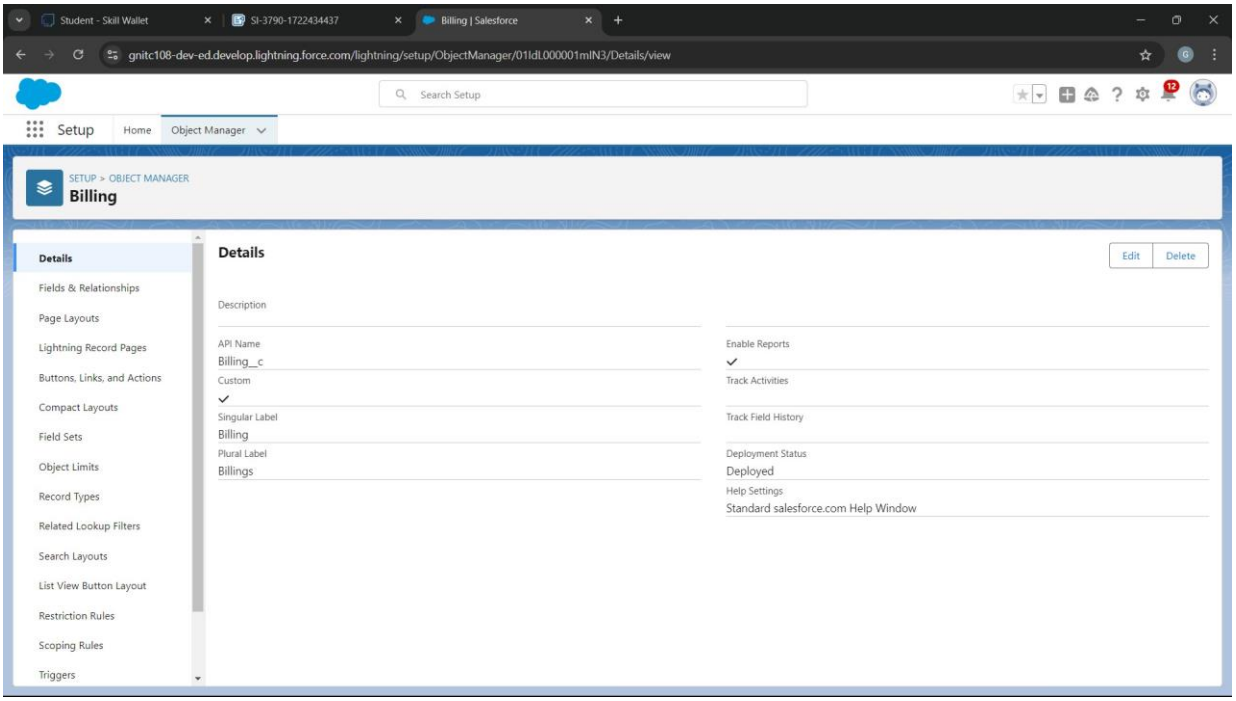
Customer Order



Price



Billing


Student - Skill Wallet
SI-3790-1722434437
Billing | Salesforce
gnitc108-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001mIN3/Details/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Details
Edit
Delete
Description
API Name
Billing__c
Custom
Singular Label
Billing
Plural Label
Billings
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

Task 4

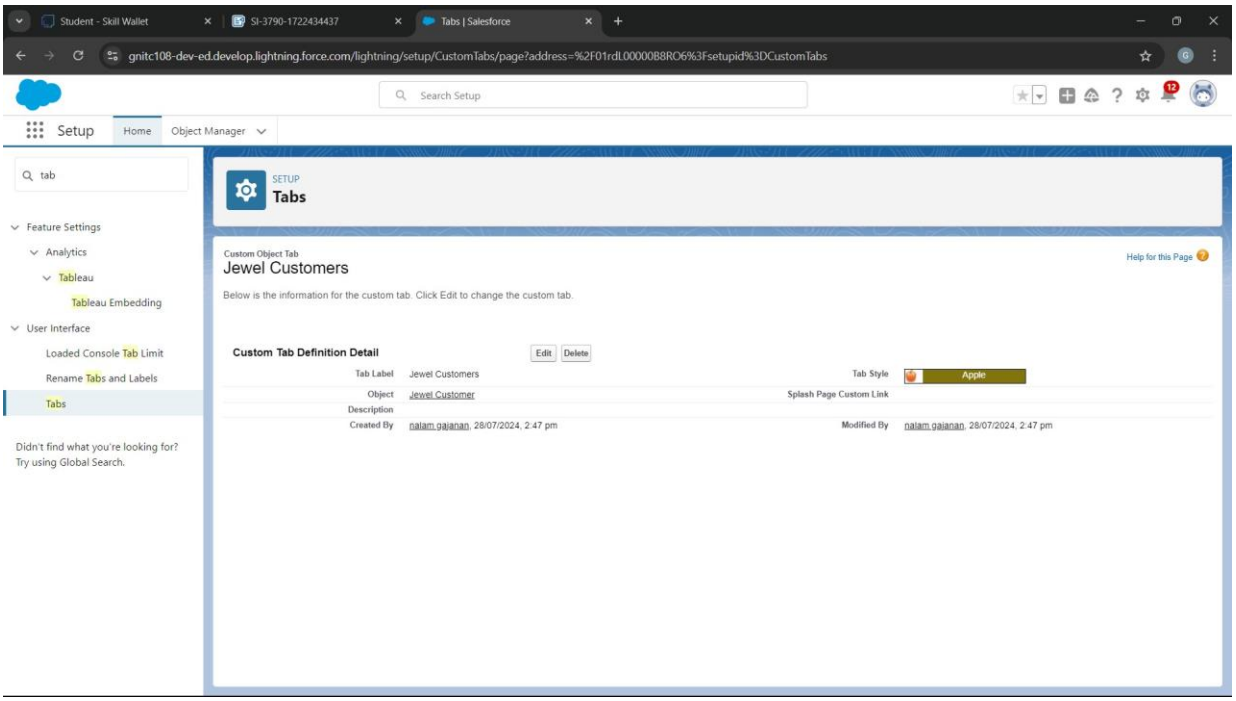
Tabs

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.

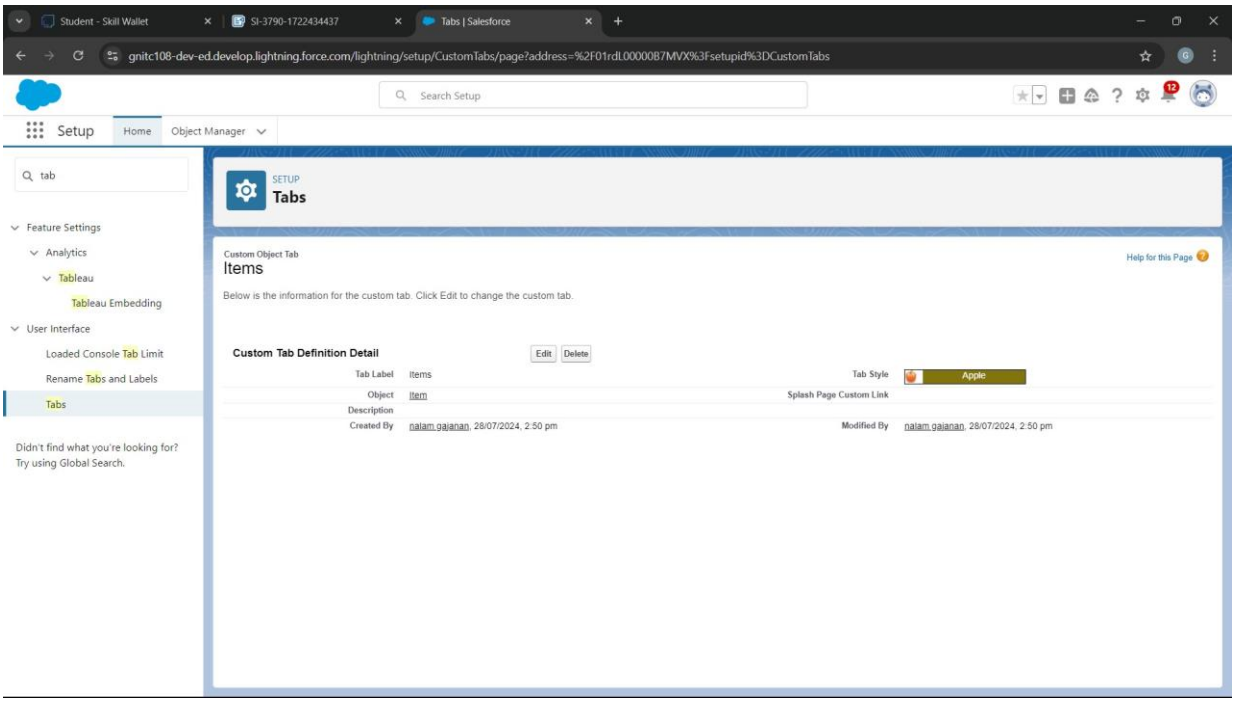
Creating a Custom Tab

To create a Tab:(Customer)

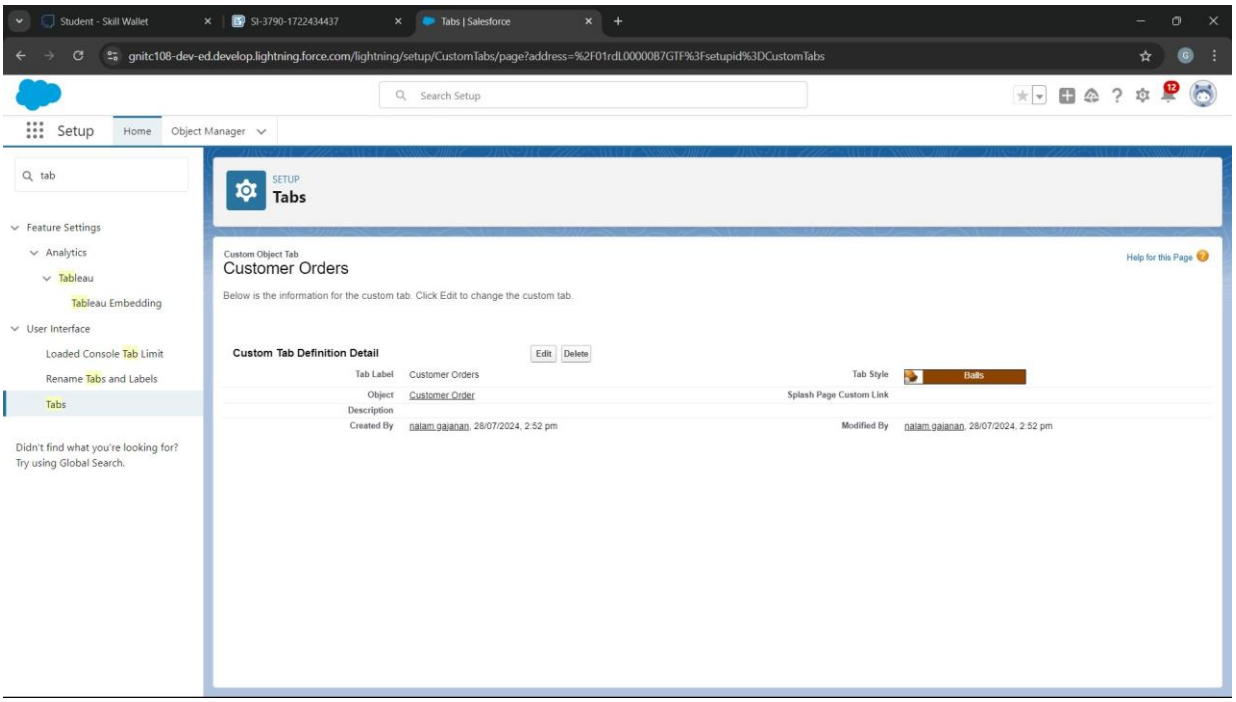
1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Jewel Customer) >> Select any tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) keep it as default >> Save.



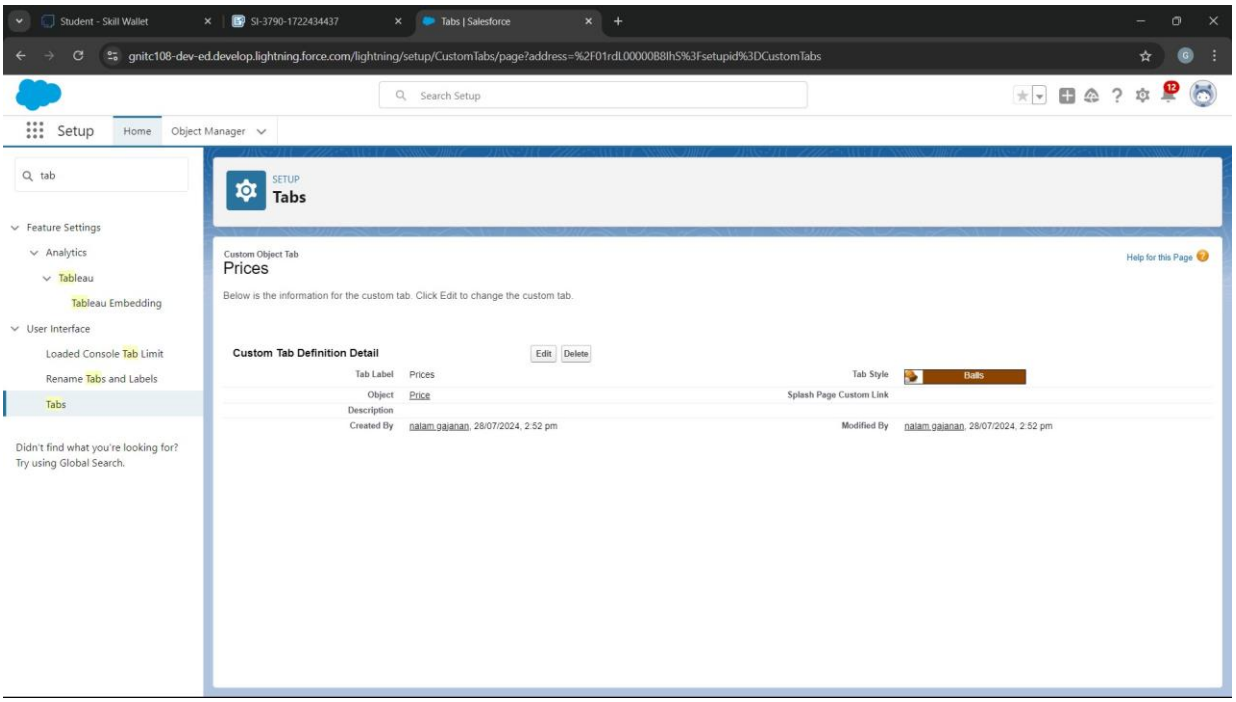
Create a Tab:(Item)



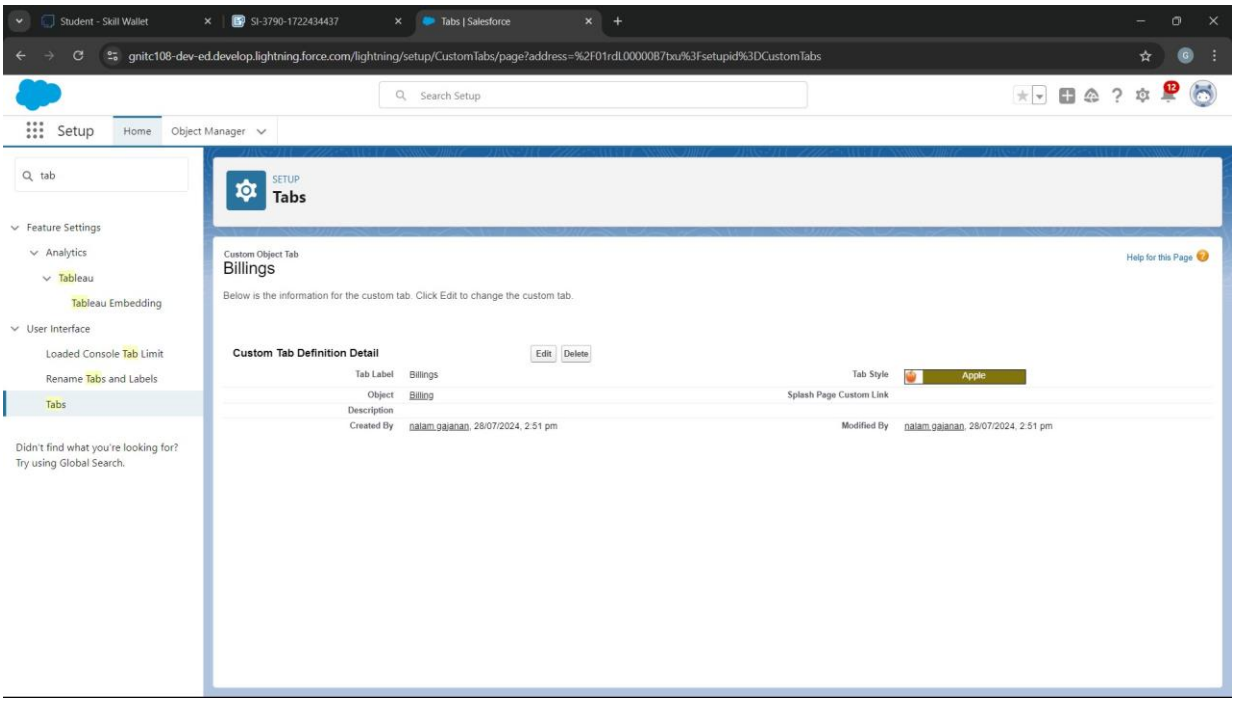
Create a Tab:(Customer Order)



Create a Tab:(Price)



Create a Tab:(Billing)



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

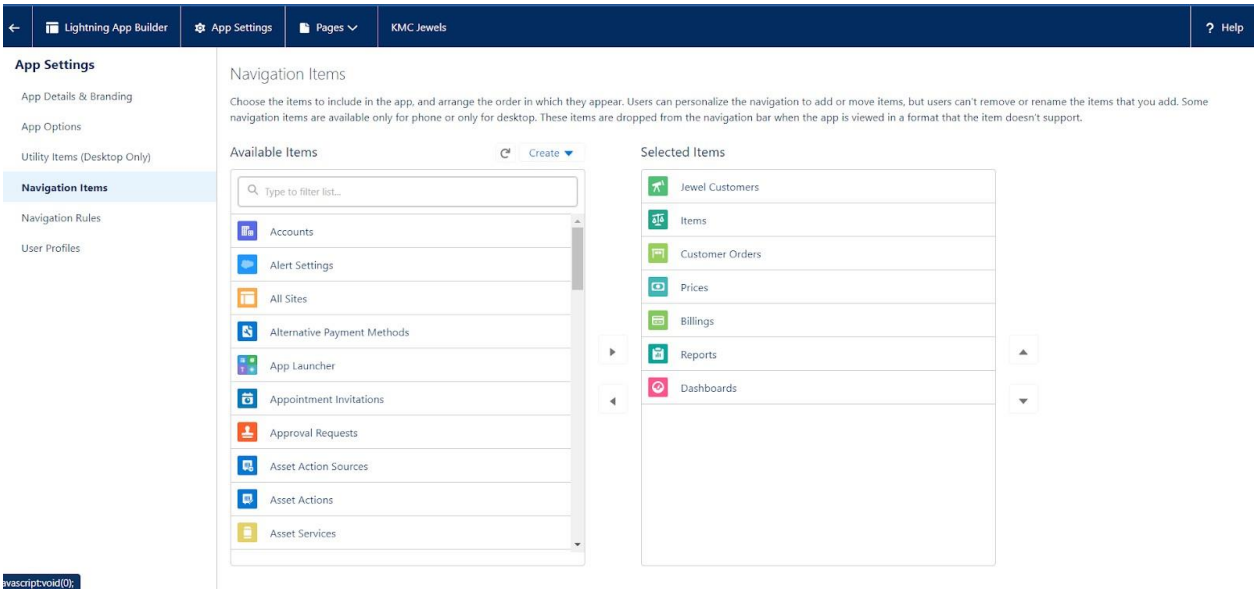
To create a lightning app page:
1. Go to setup page>>search “app manager” in quick find>>select “app manager”>>click on New lightning App.

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.

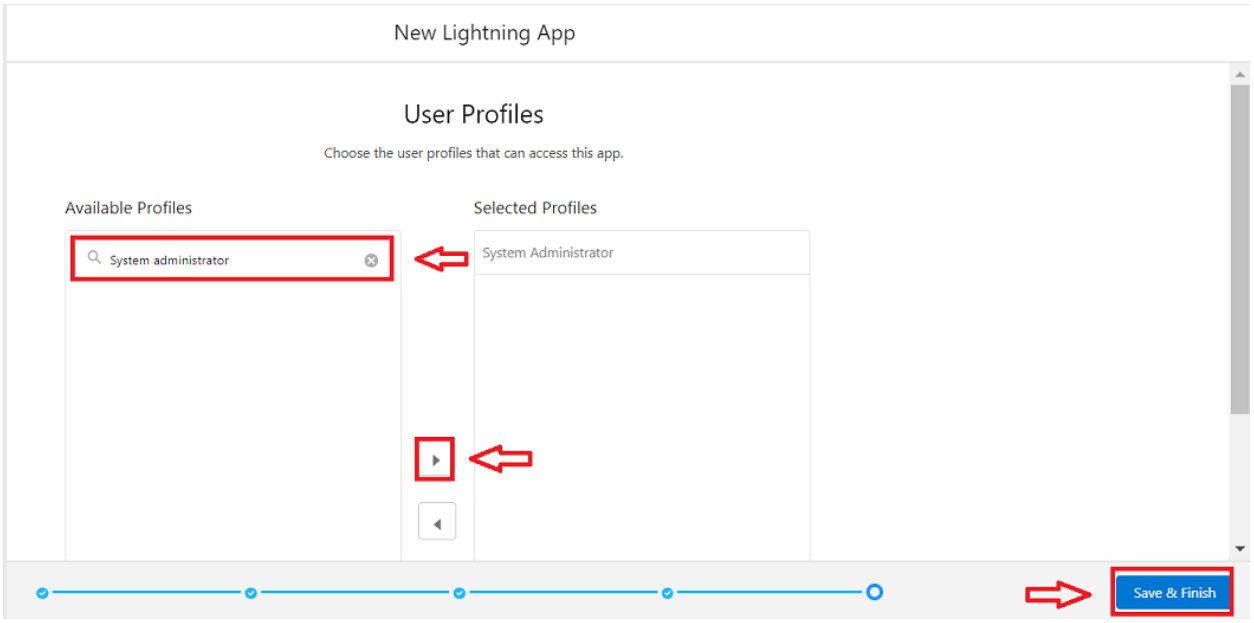
4.(Utility Items) keep it as default>>Next.

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

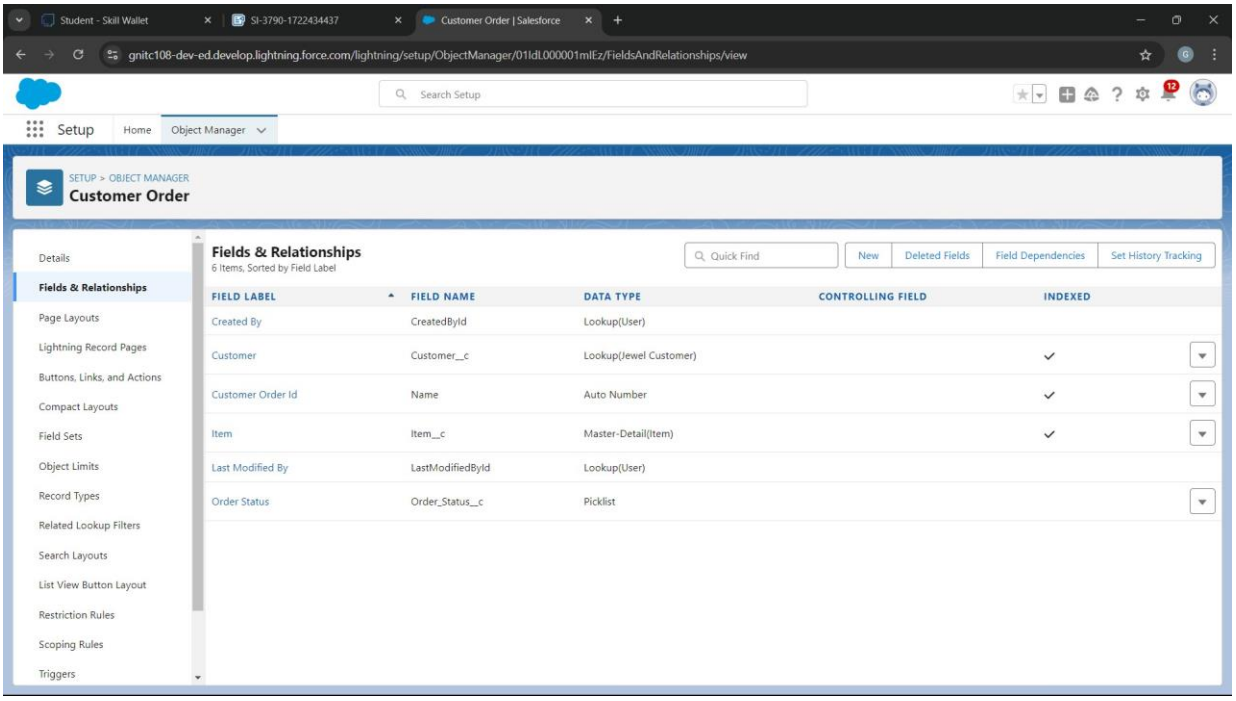
Custom Fields:
On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organiser or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision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

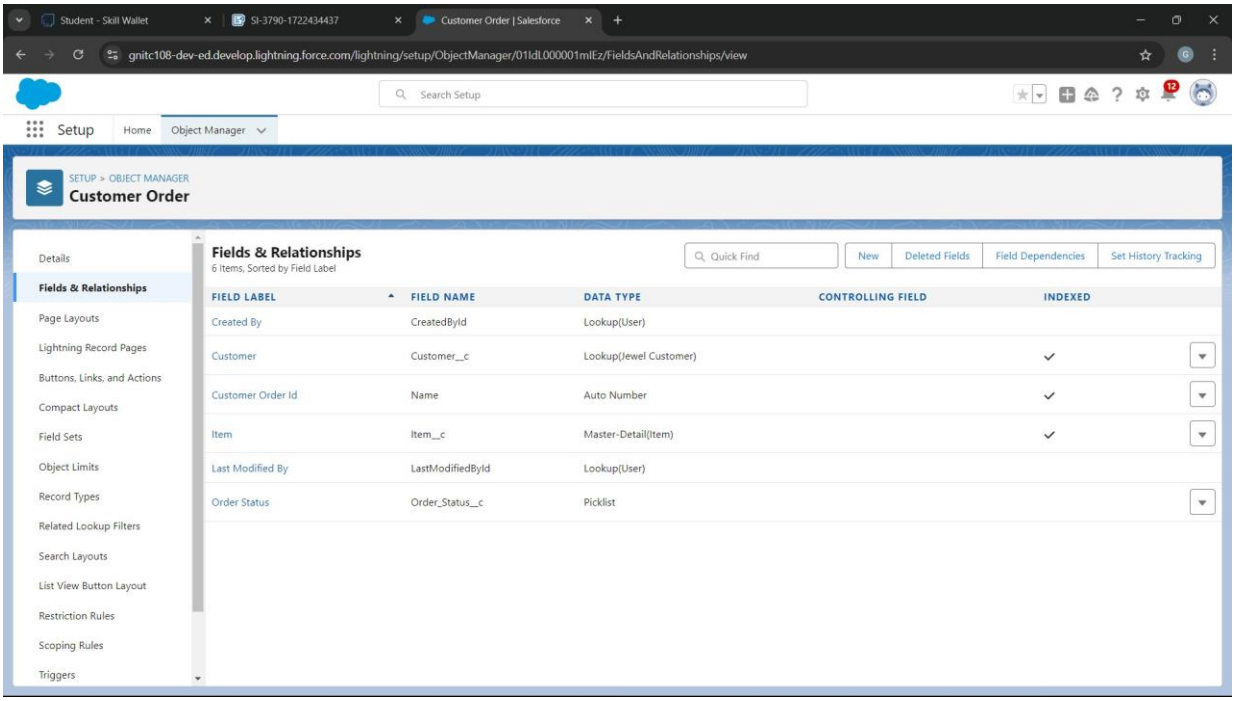


Creating a Master-Detail Relationship

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

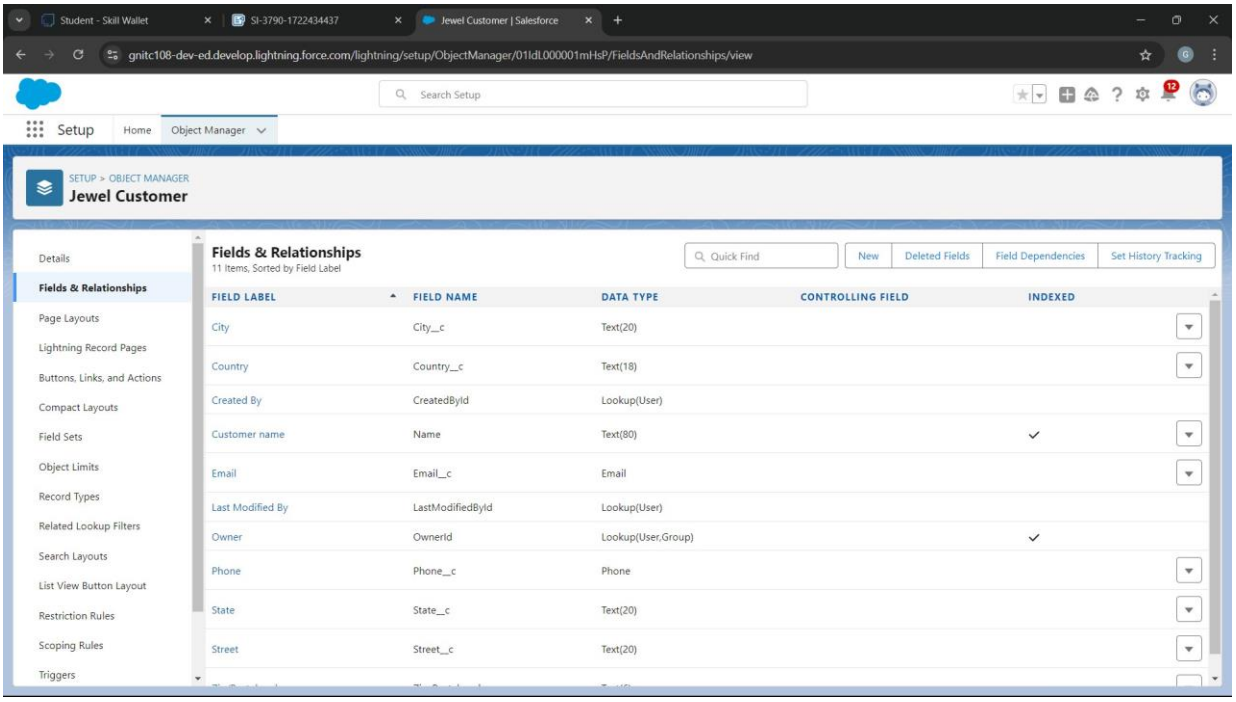
Create a Master-Detail relationship :
1. Go to the setup page >> click on object manager >> type object name(Customer Order) in the quick find bar >> click on the object.
2.Click on fields & relationships >> click on New.
3.Select “Master-Detail relationship” as data type and click Next.
4.Select the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



Creating Text Field in Jewel Customer Object

To create fields in an object:

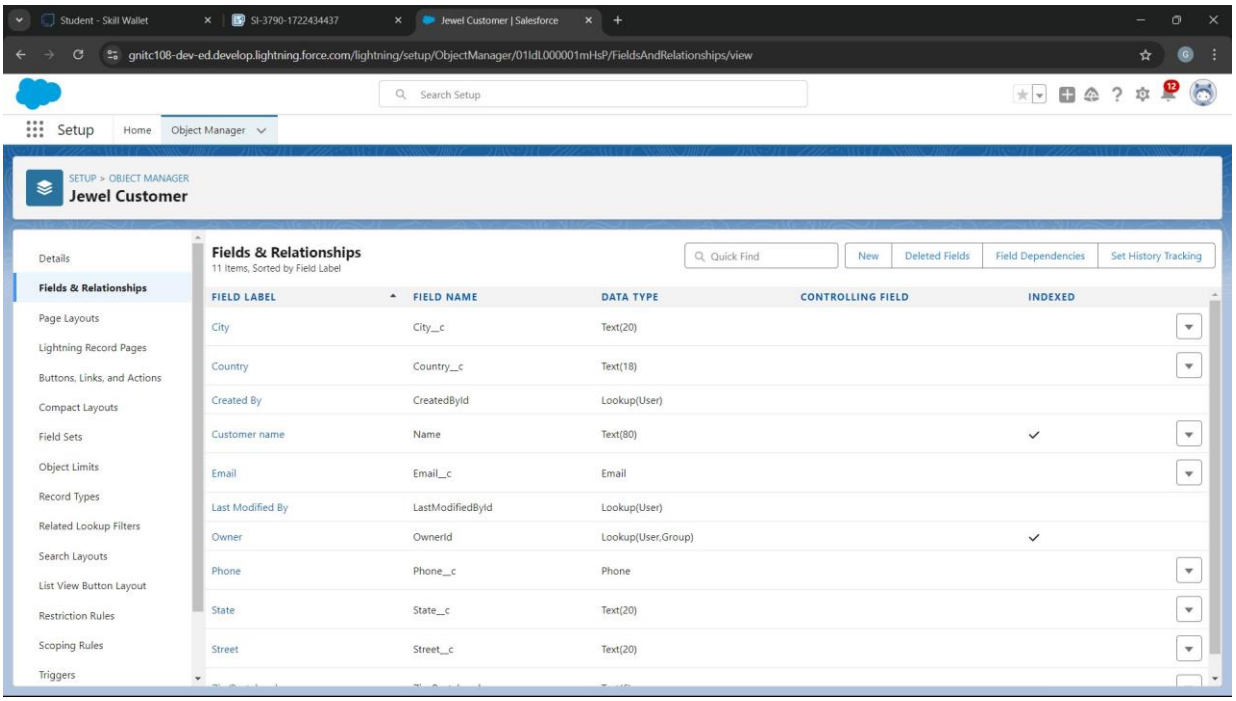
1. Go to setup >>click on Object Manager>> type object name(Jewel Customer) in quick find bar>> click on the object.
2. Now click on “Fields & Relationships” ? New
3. Select Data type as “Text”.
4. Click on Next
5. Fill the above as following:
    - Field Label: City
    - Length : 20
    - Field Name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



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”.

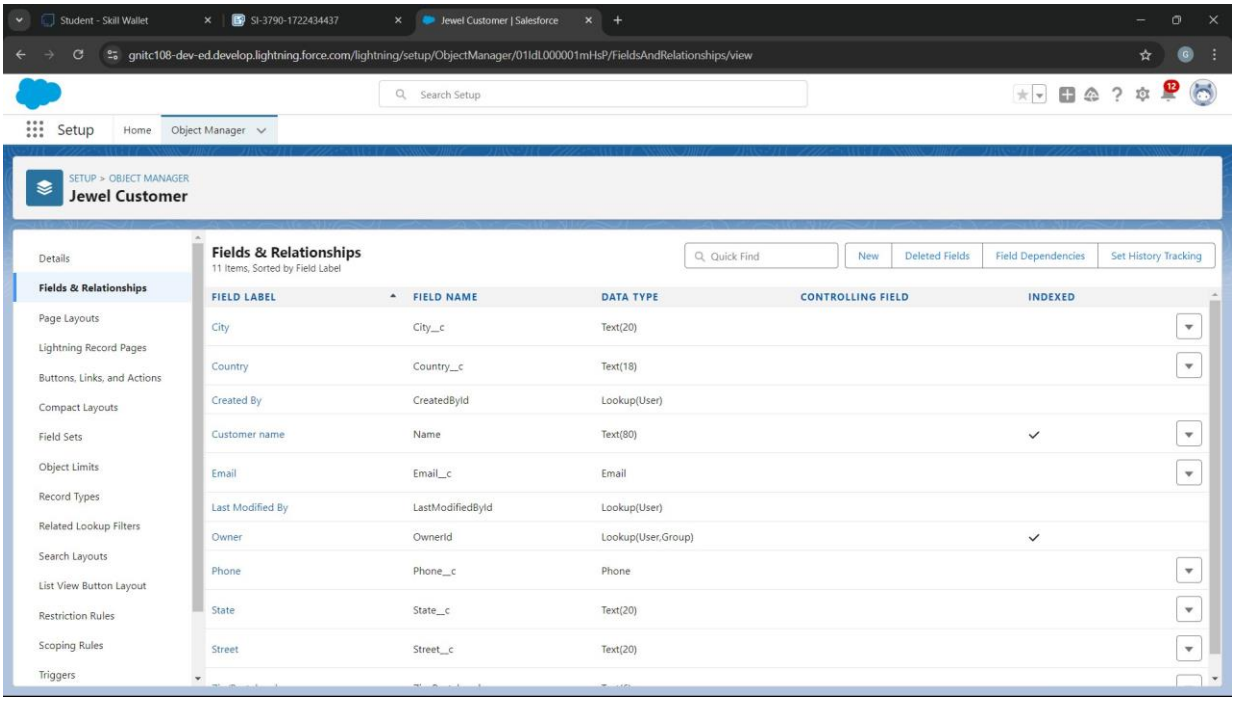


5.Field Name will be auto populated, and click on Next >> Next >> Save & new.

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

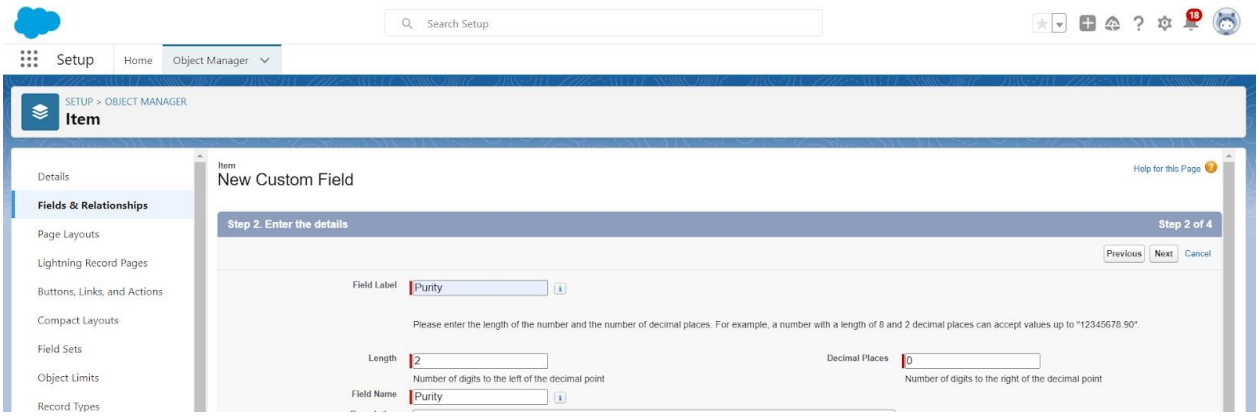
To create fields in an object:

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.

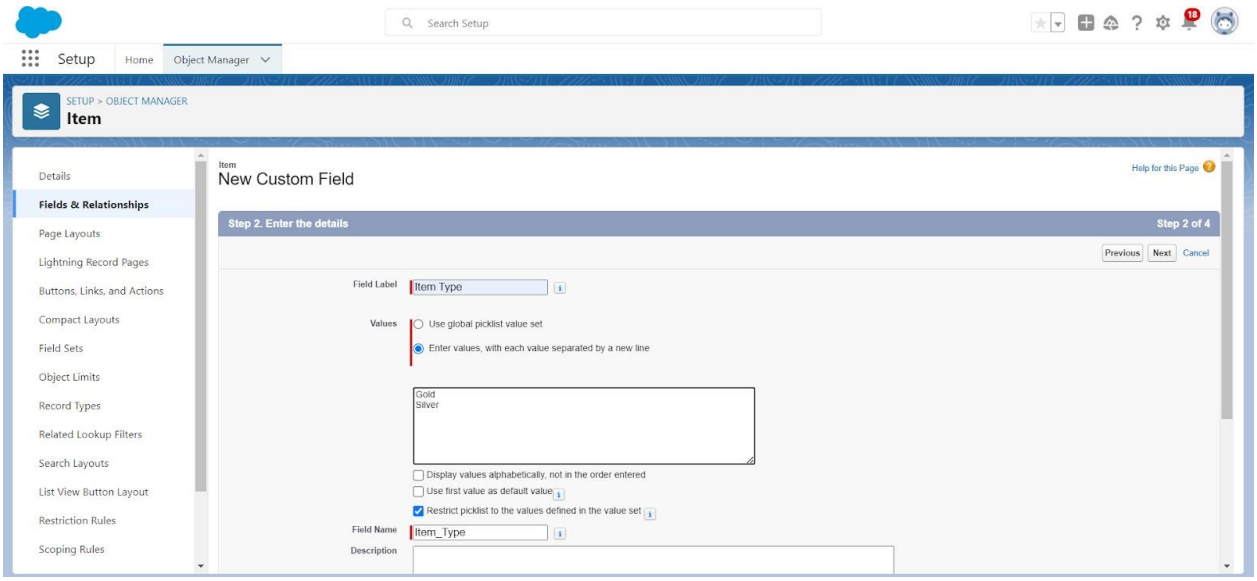
4.Given the Field Label as “ Purity” and length as “ 2 ”.



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

Creating Picklist Field in Item Object

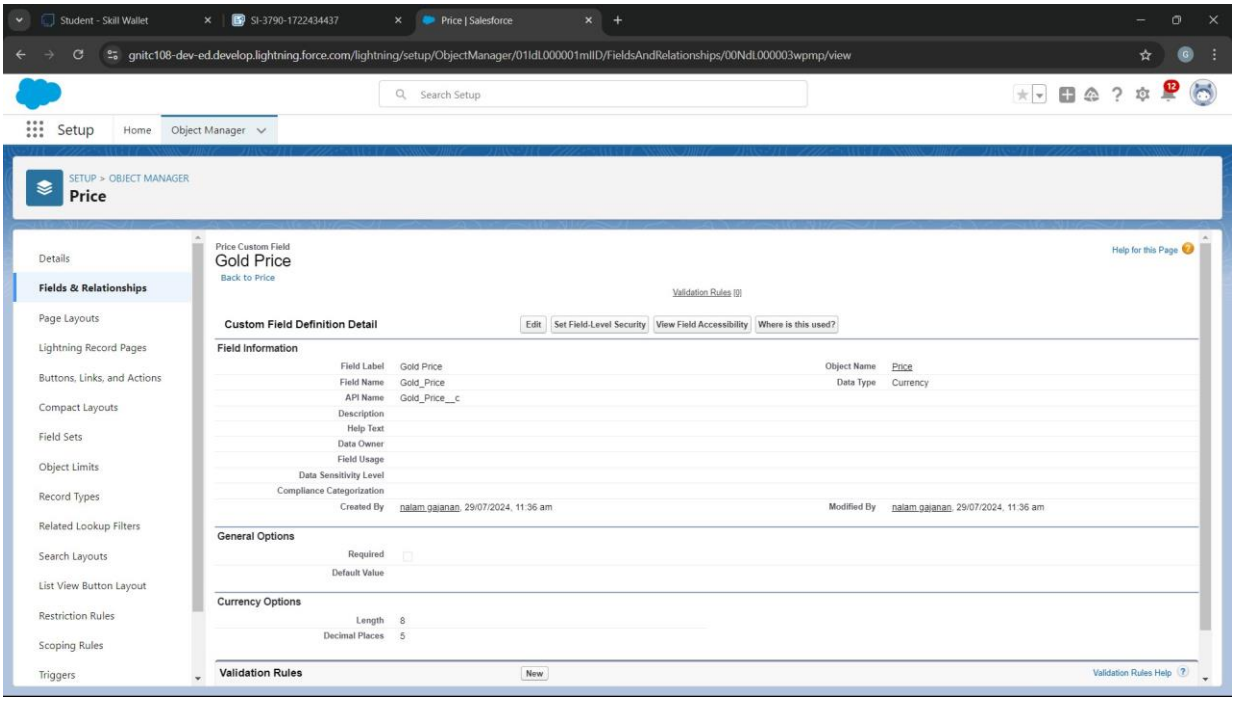
To create fields in an object:
1.Go to setup >> click on Object Manager >>type object name(Item) in quick find bar >> click on the object.
2.Now click on “Fields & Relationships” >> New.
3.Select Data type as “Picklist” and click Next.
4.Enter Field Label as “Item Type”.
5. In values select “Enter values(Gold,Silver),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



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

Creating Currency Field in Price Object

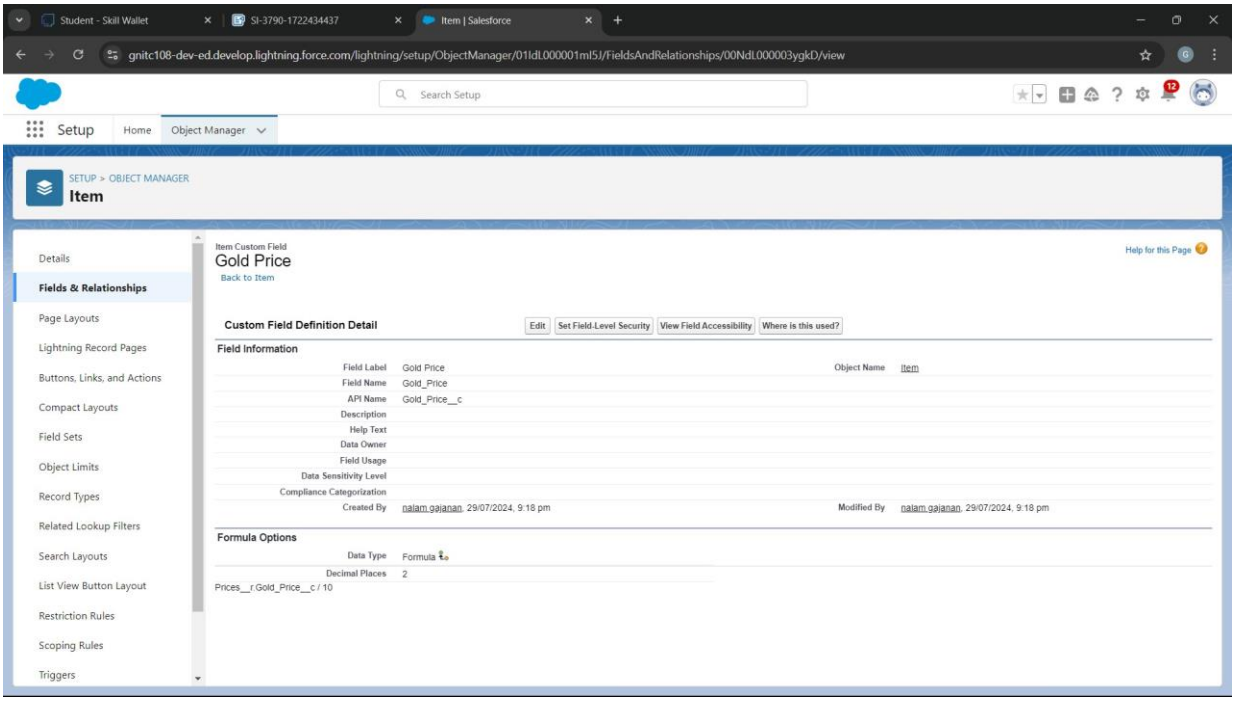
To create fields in an object:
1.Go to setup >> click on Object Manager >> type object name(Price) in quick find bar >> click on the object.
2.Now click on “Fields & Relationships” >> New.
3. Select Data type as “Currency” and click Next.



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.

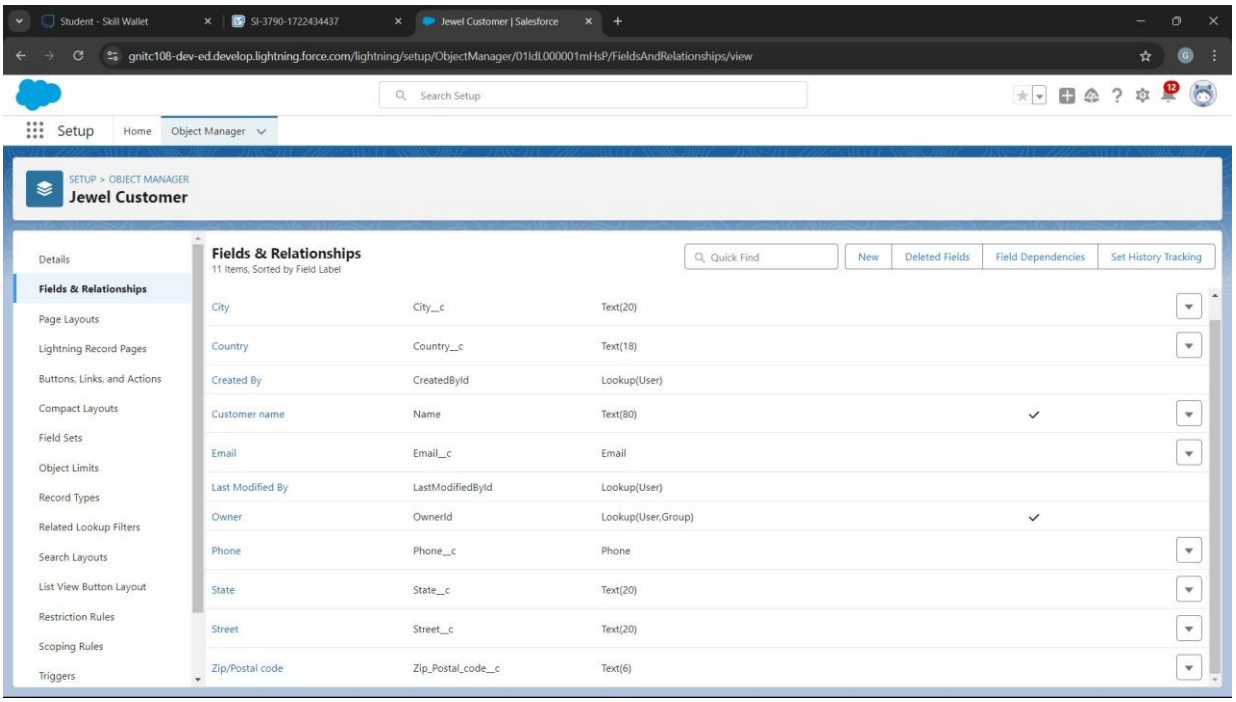


Creating Remaining Fields in Objects

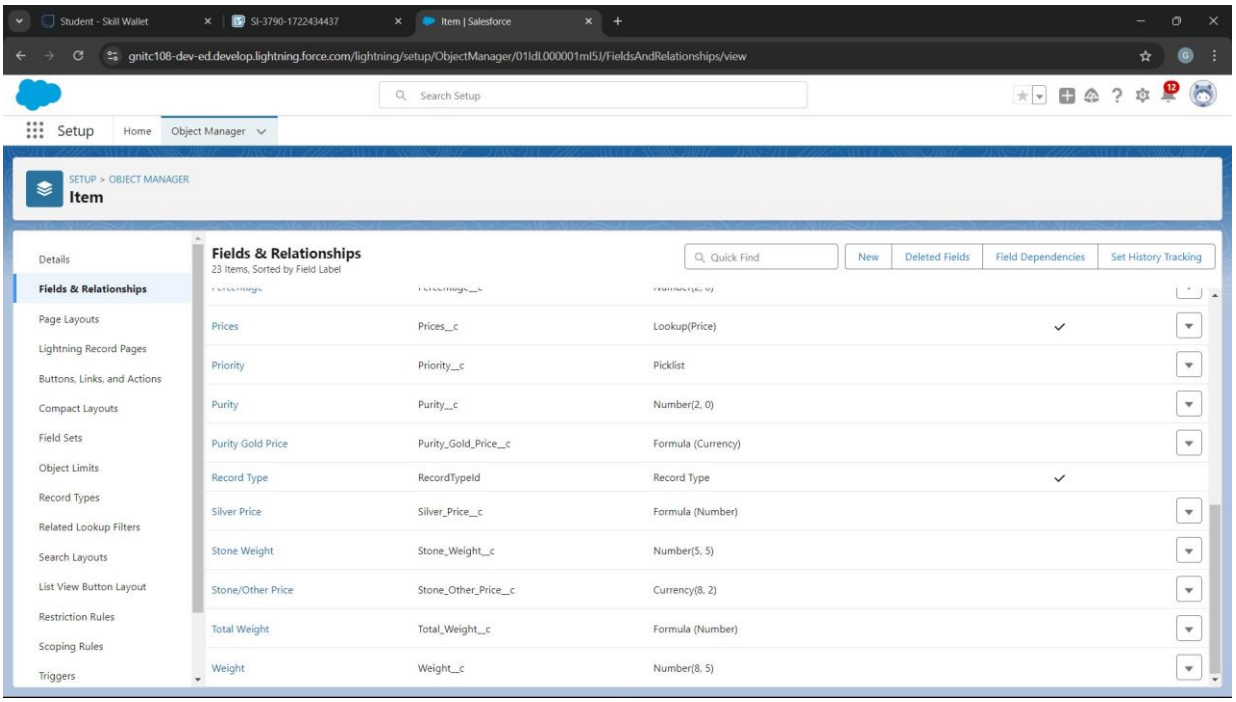
Now create the remaining fields using the data types mentioned.

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

1. Fields for Jewel Customer



2. Fields for Item



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)

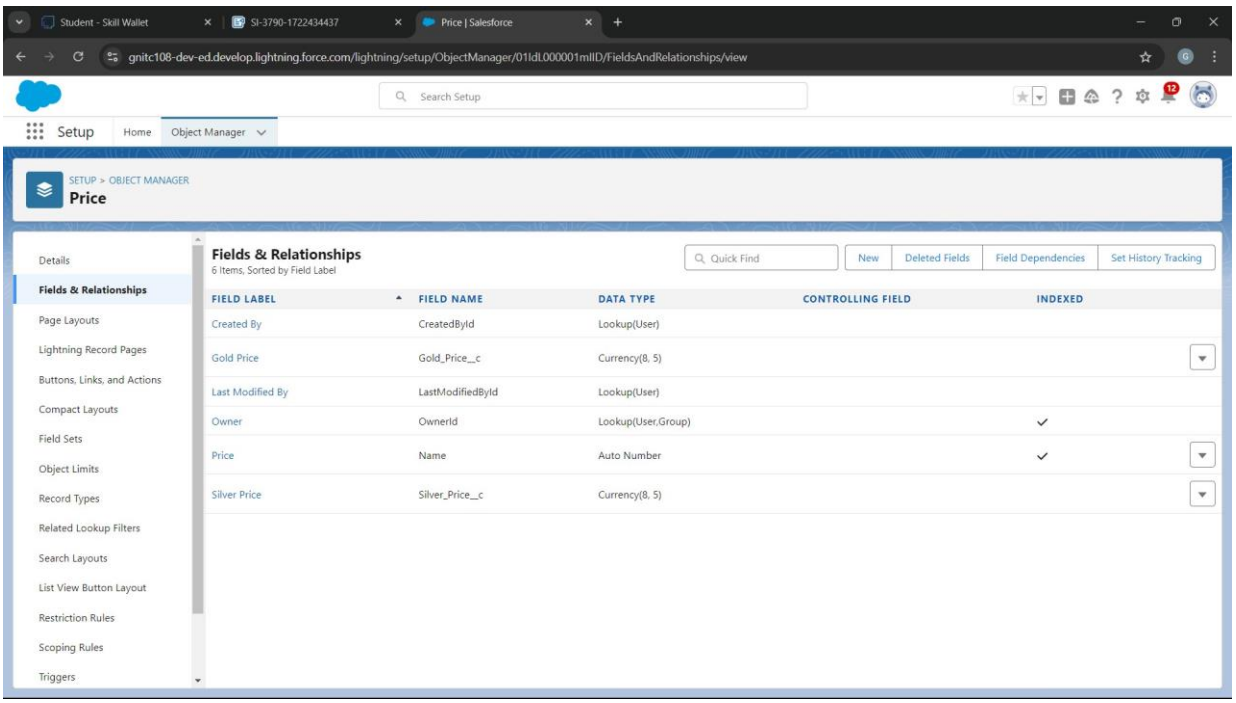
Expected Days Of Return	Picklist 1-3 Days 4-5 Days 6-7 Days 8-10 Days
Priority	Picklist Low Medium High Critical
Silver Price	Formula (Return Type:Number) (Decimal=3) (Prices__r.Silver_price__c / 1000)
Purity Gold Price	Formula (Return Type:Currency) (Decimal=2) ((Prices__r.Gold_price__c * Purity__c)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

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

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

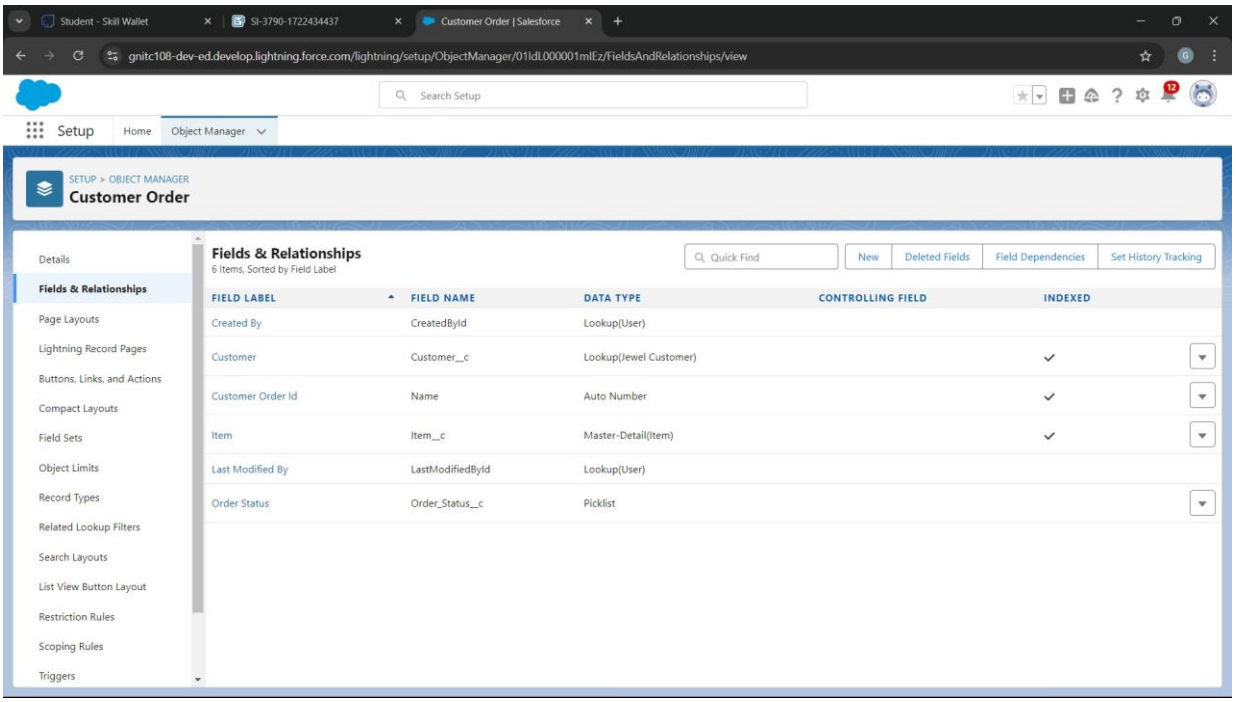
3.Fields for Price

3	Price	<table><tr><td>Silver Price</td><td>Currency (Length=8,Decimal=5)</td></tr></table>



4.Fields for Customer Order

4	Customer Order	Order Status: Picklist Started Not StartedOn Hold Completed Not Completed

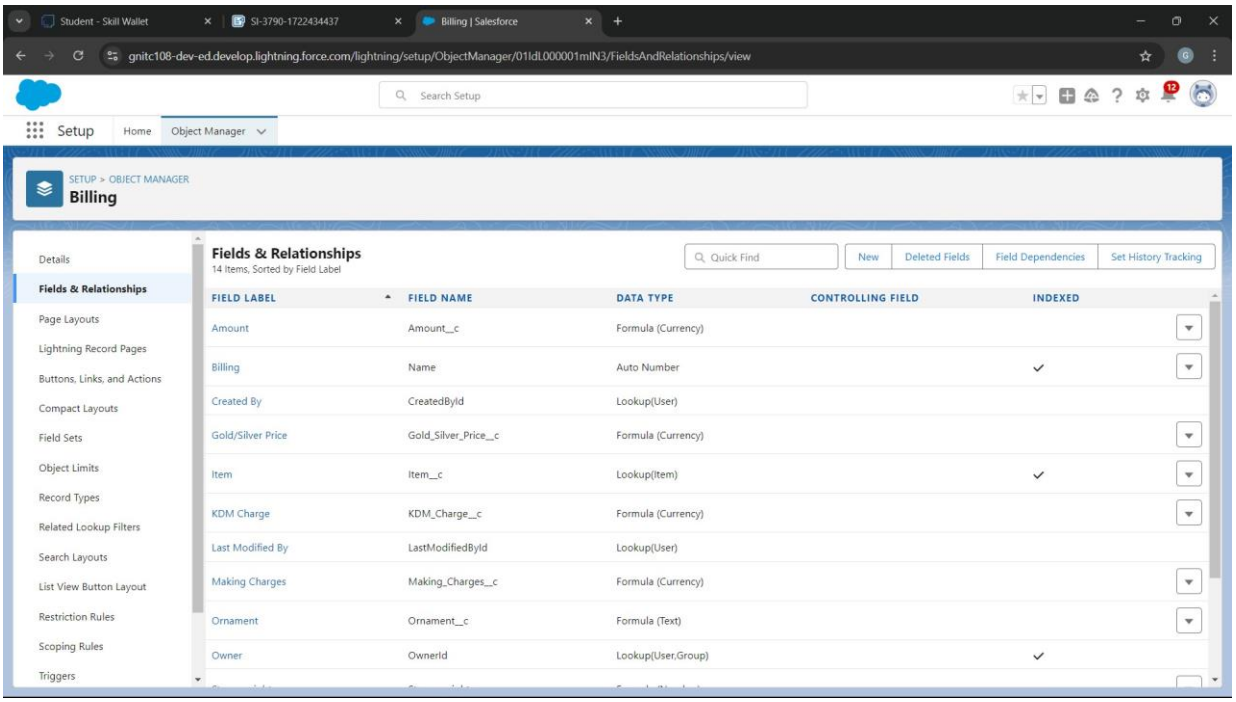


5	Billing	

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

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

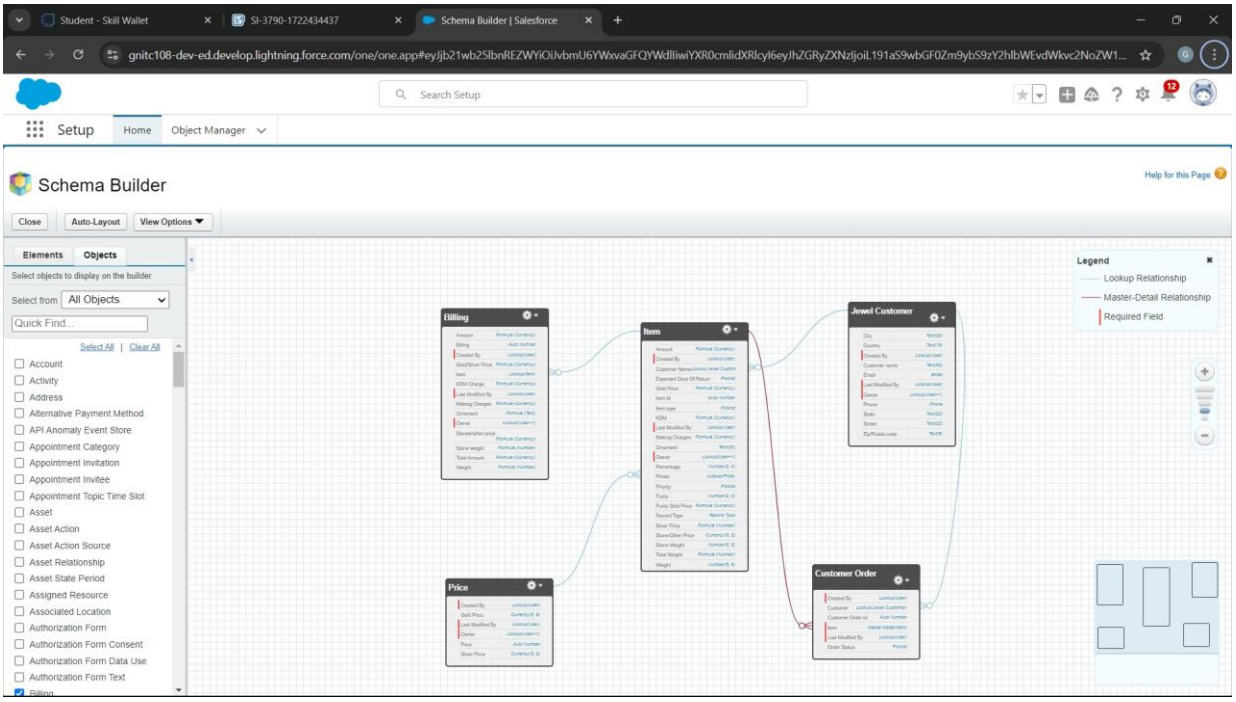
5. Fields for Billing



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:

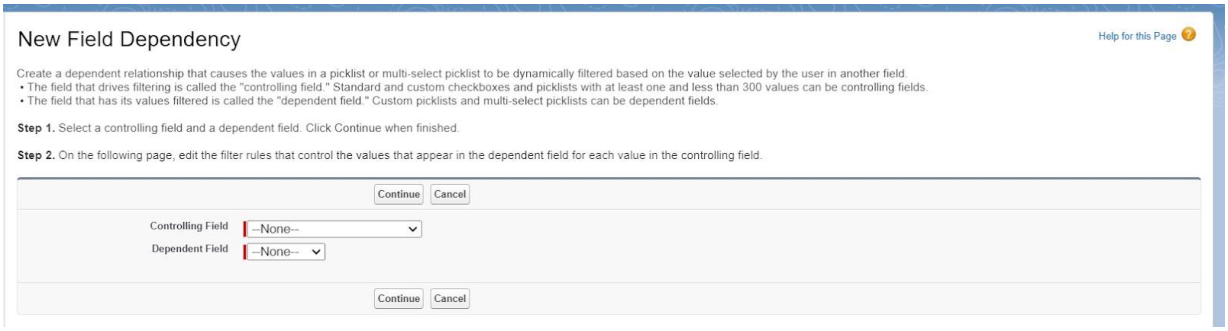
Field Dependencies are used to create relationships between fields within an object. They allow you to control the visibility and availability of fields based on the values selected in other fields.

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.



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.

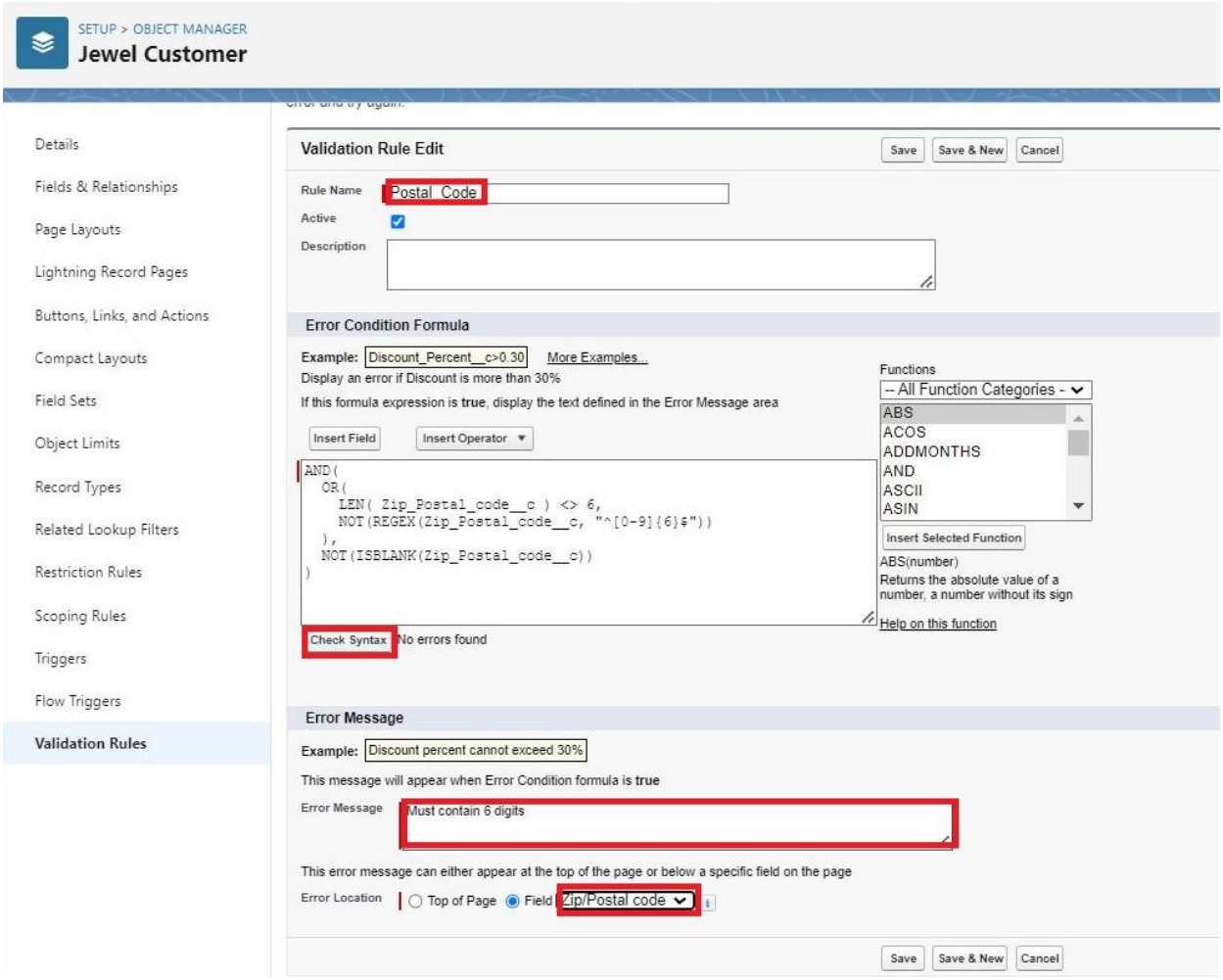
1.Enter Rule name as “ValidationRule For JewelCustomerObject “.2.Insert
the Error Condition Formula as : -

```
    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.


SETUP > OBJECT MANAGER
Jewel Customer
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
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 :

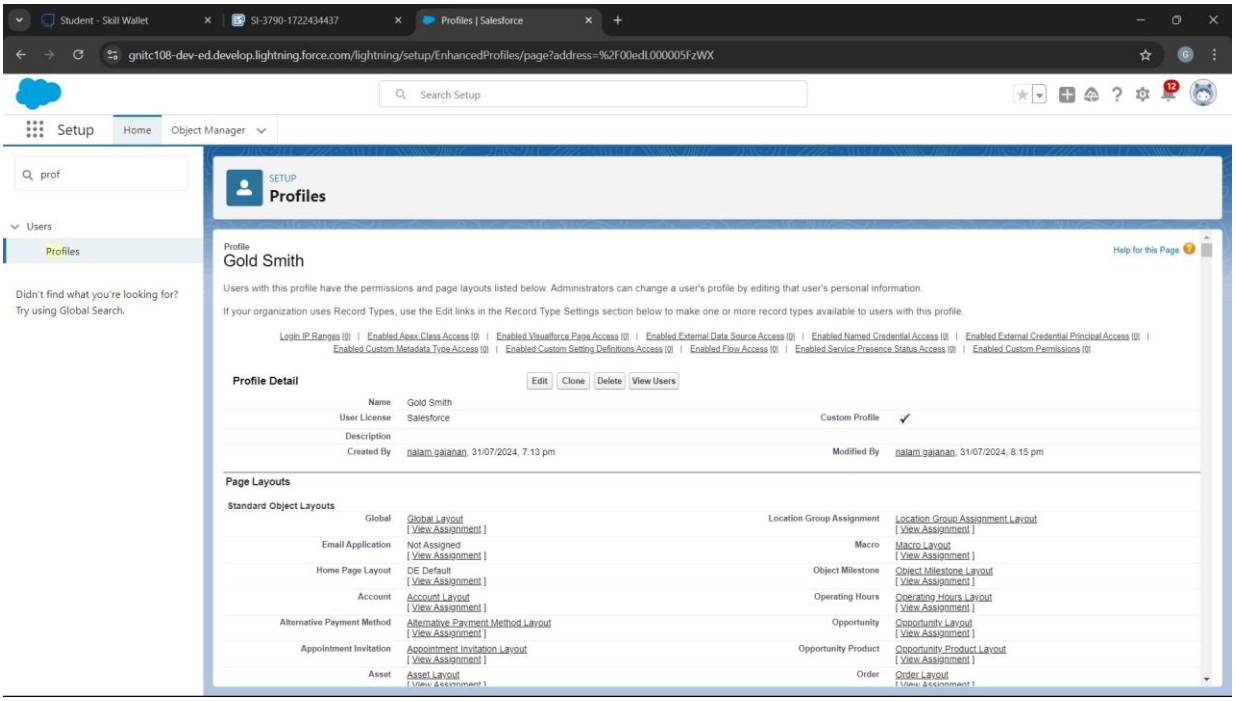
Profiles

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

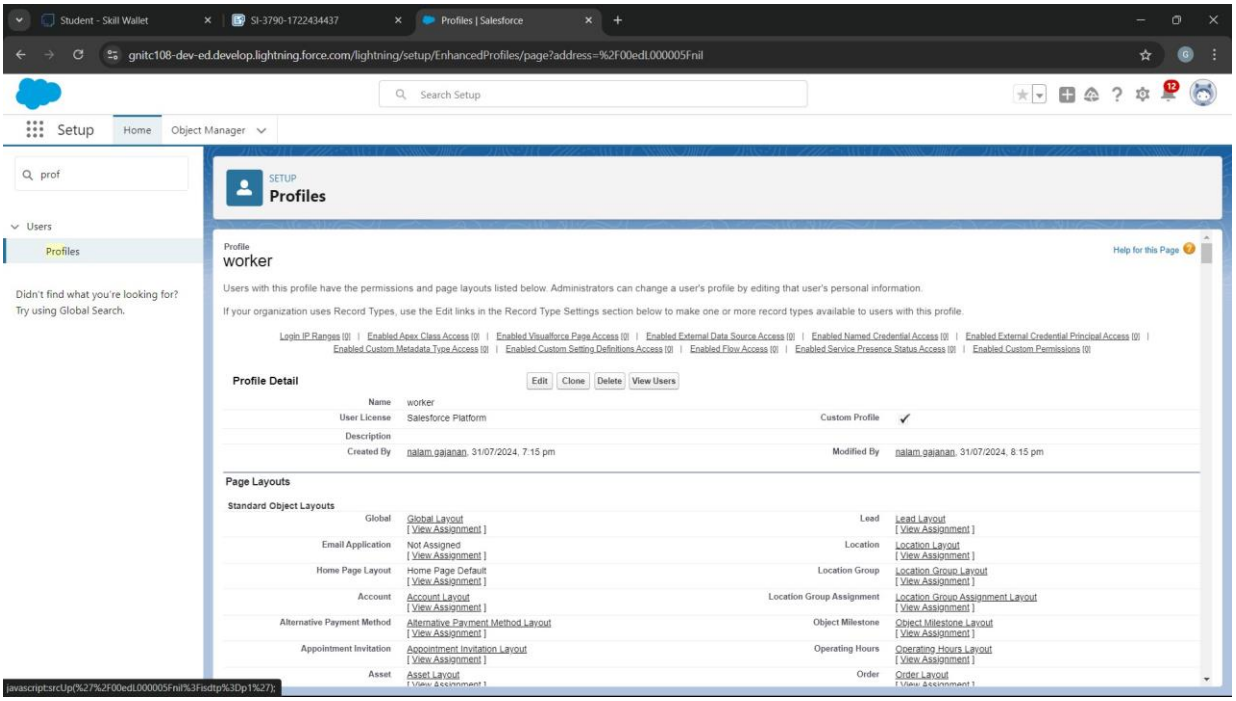
To create a new profile:

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.



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.



Task 8 :

Roles

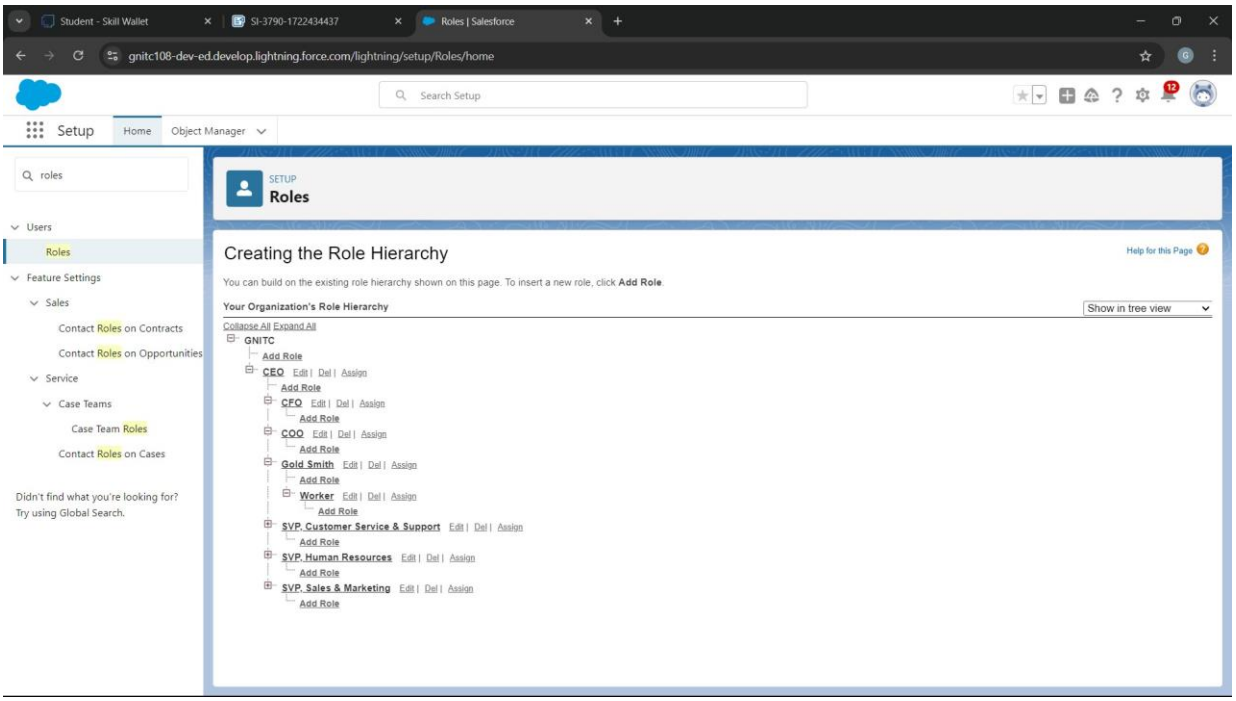
A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organisation can have to data. Simply put, it describes what a user could see within the Salesforce organisation.

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.

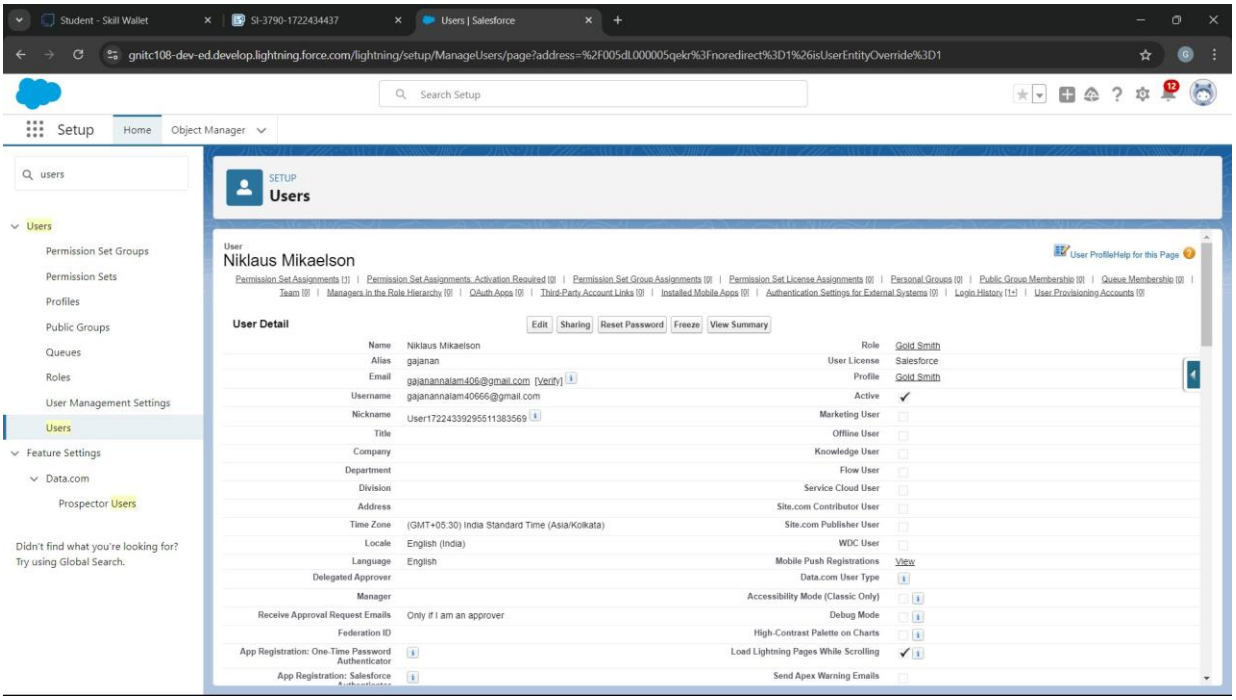


Task 9 :

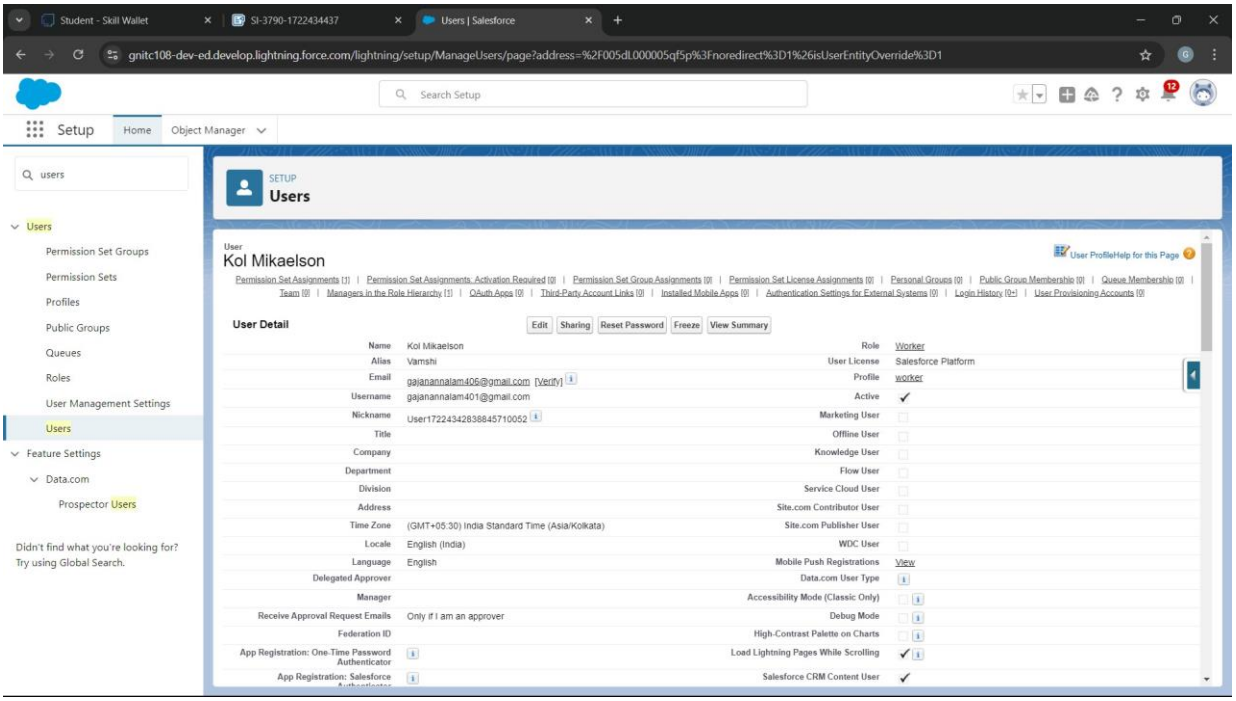
Users

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



Create User-2

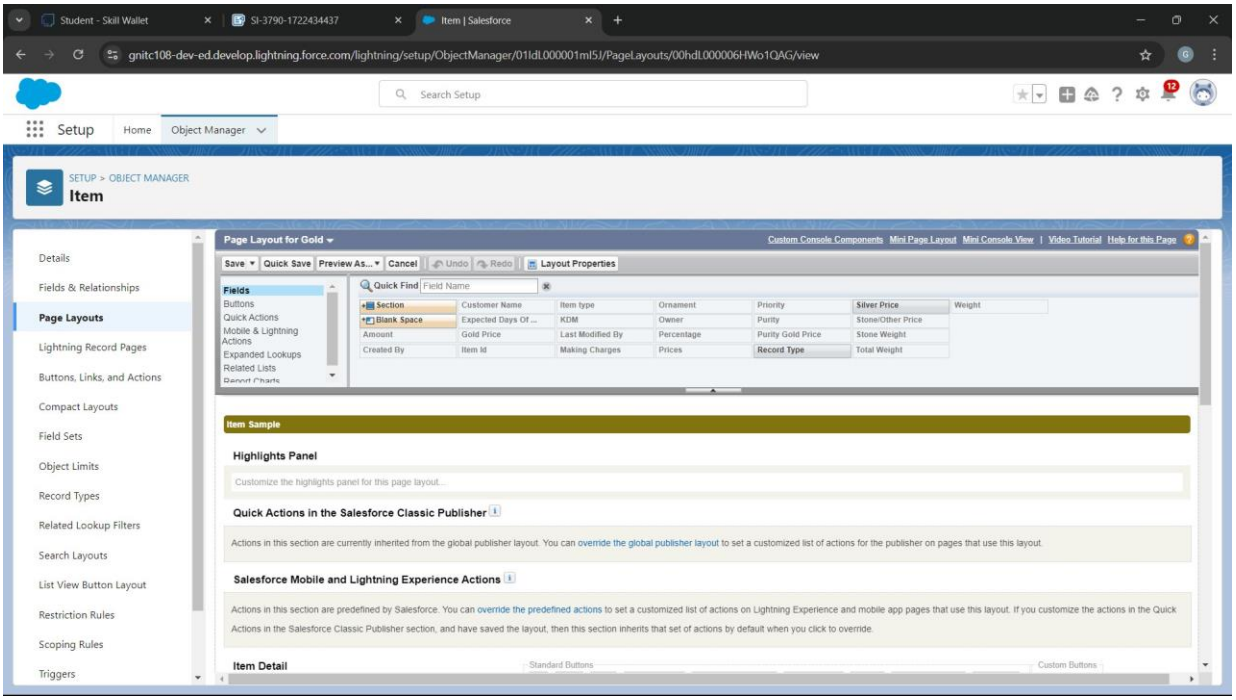


Task 10 :

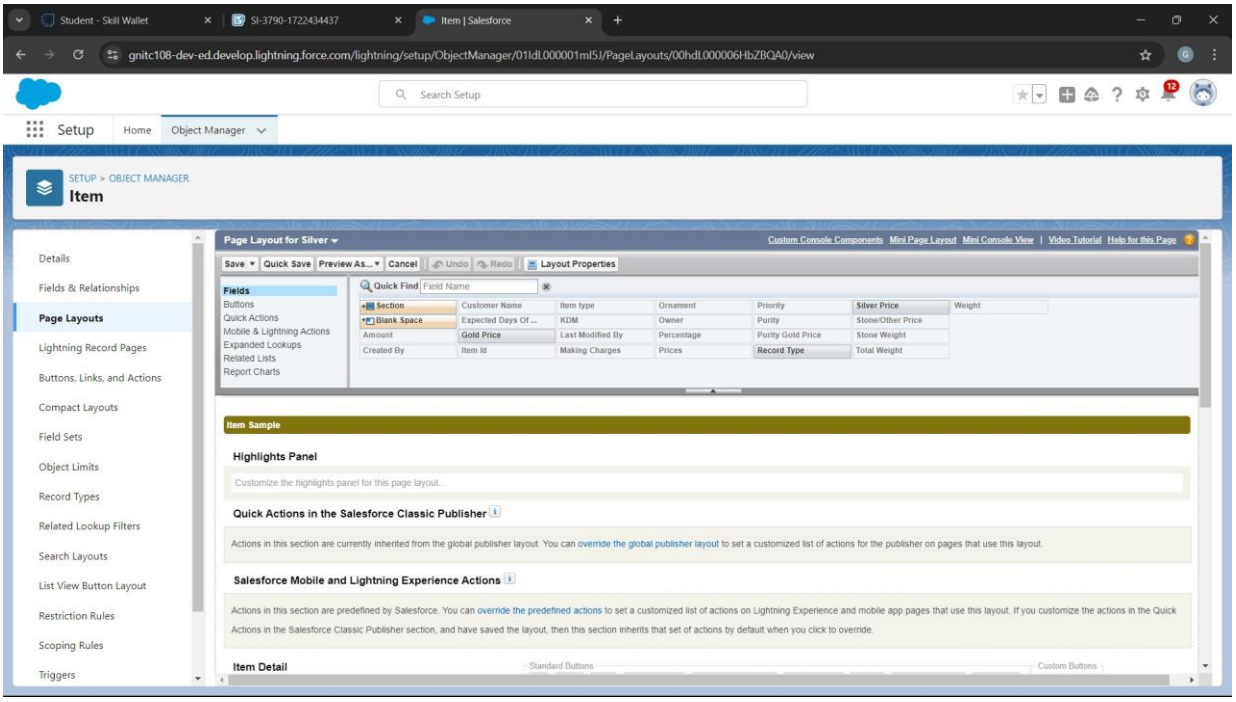
Page layouts

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



Silver Page layout

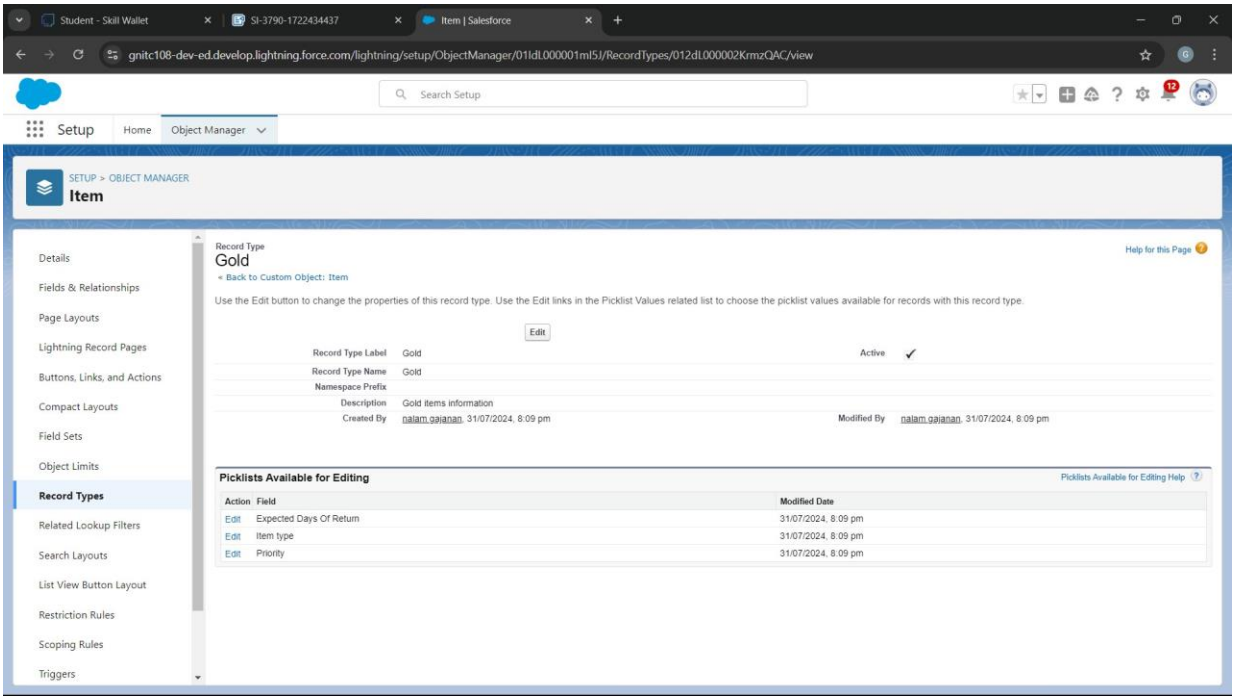


Task 12 :

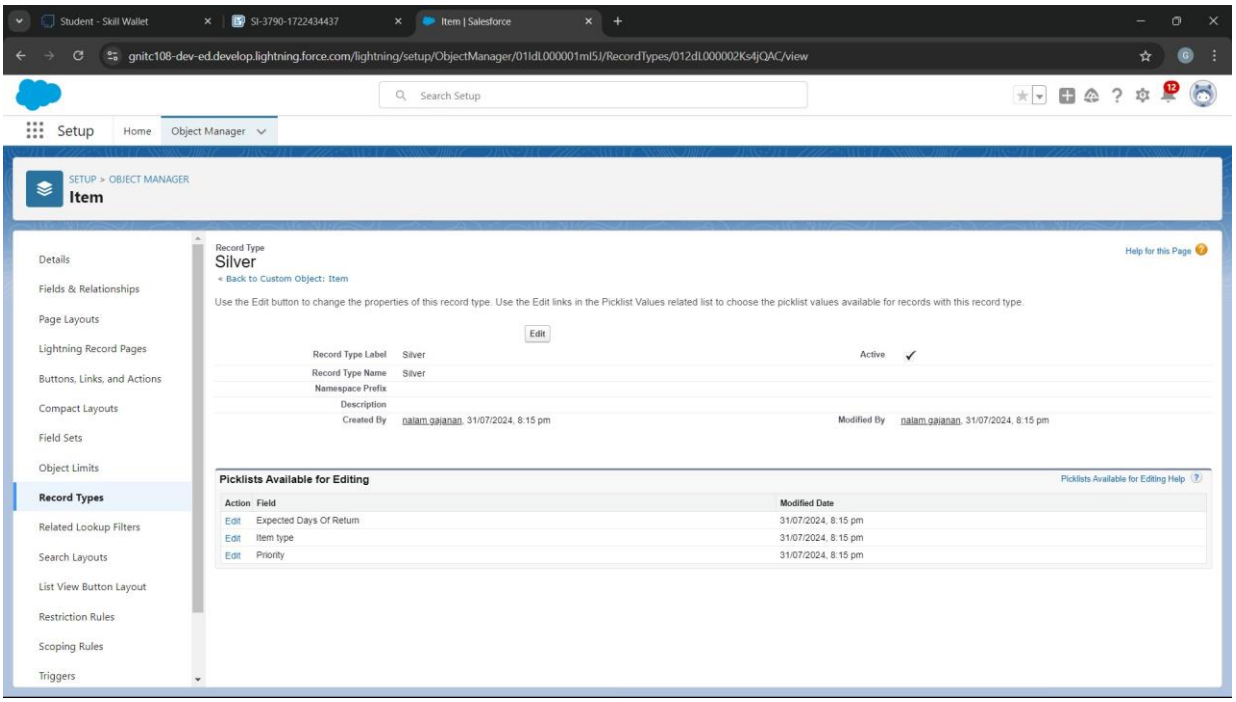
Record Types

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”



Create another Record Type with name “Silver”

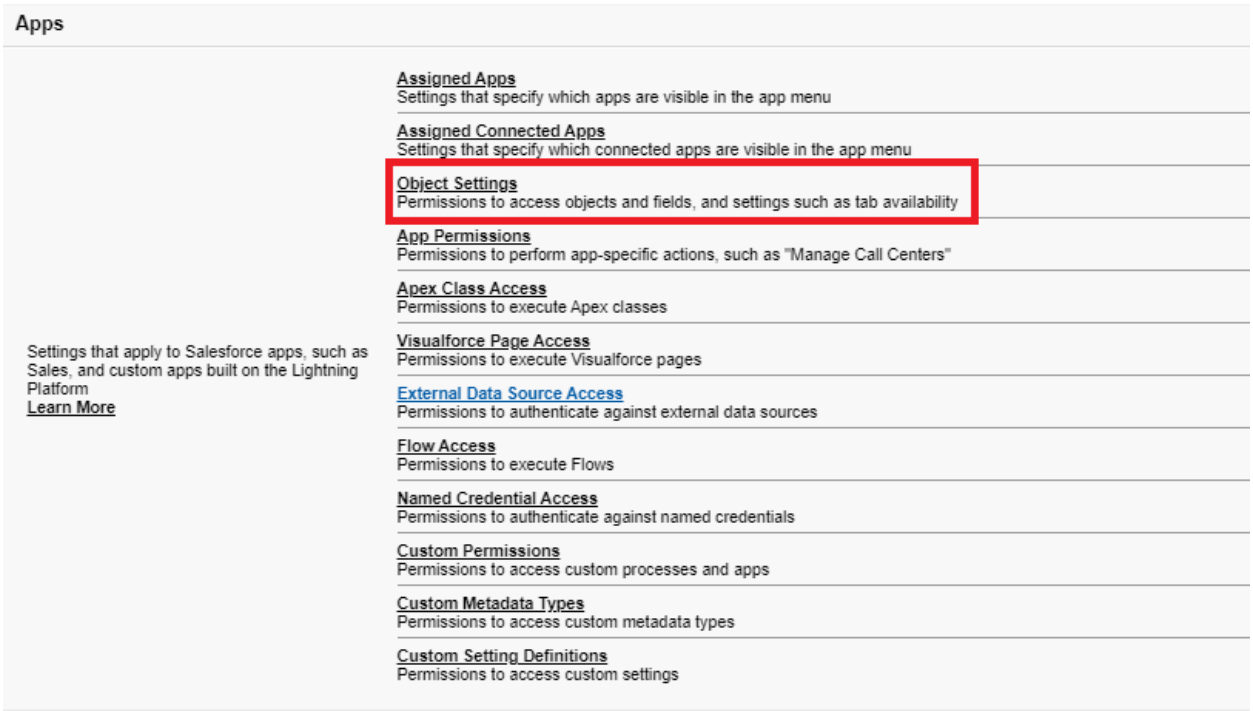


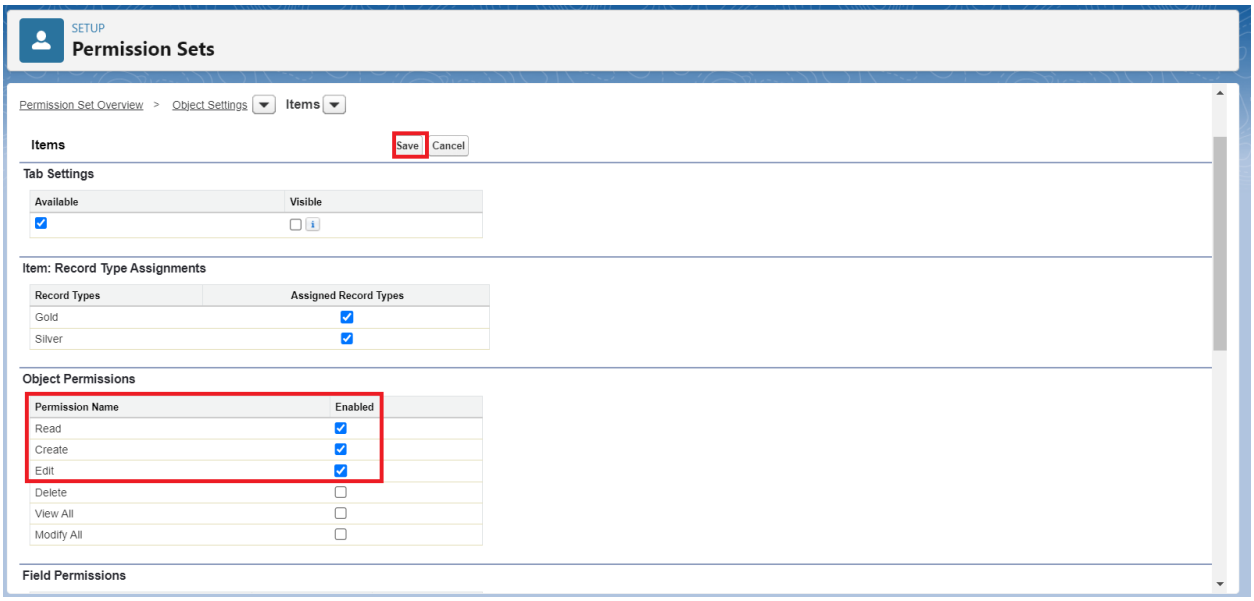
Task 13 :

Permission sets

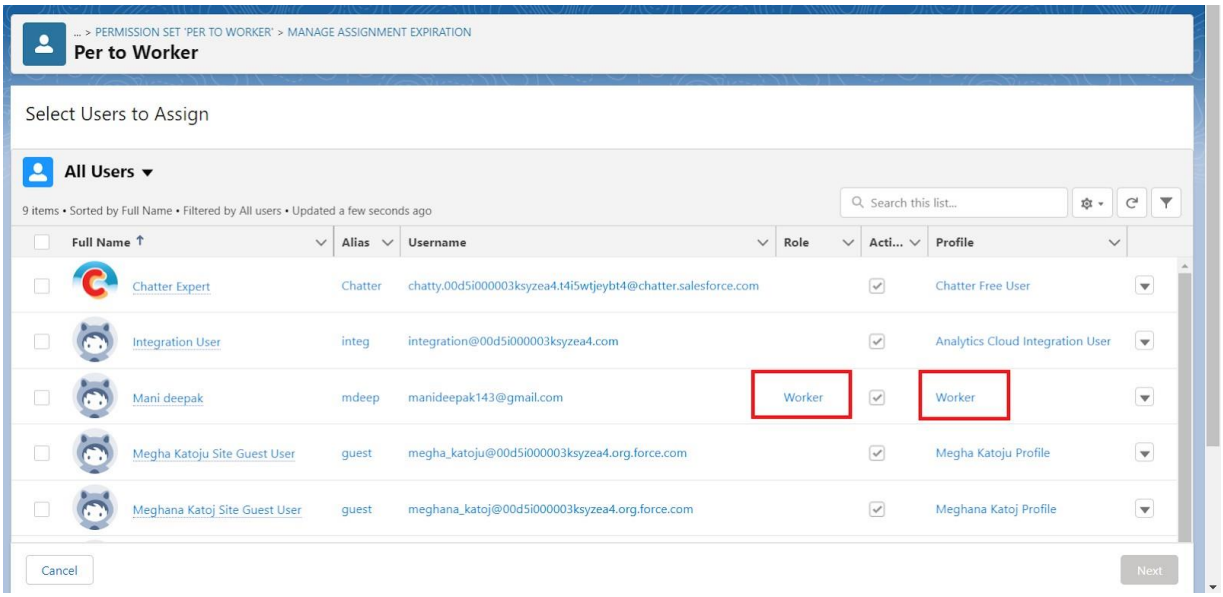
A standard permission set consists of a group of common permissions for a particular feature associated with a permission set licence. Using a standard permission set saves you time and facilitates administration because you don't need to create the custom permission set.

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.





5. Click on Save.
6. After saving the permission click on the Manage assignment
7. Now click on the Add Assignment.
8. Now select the users which you have created in user milestone, using Worker profile and click on Next >> Assign >> Done.



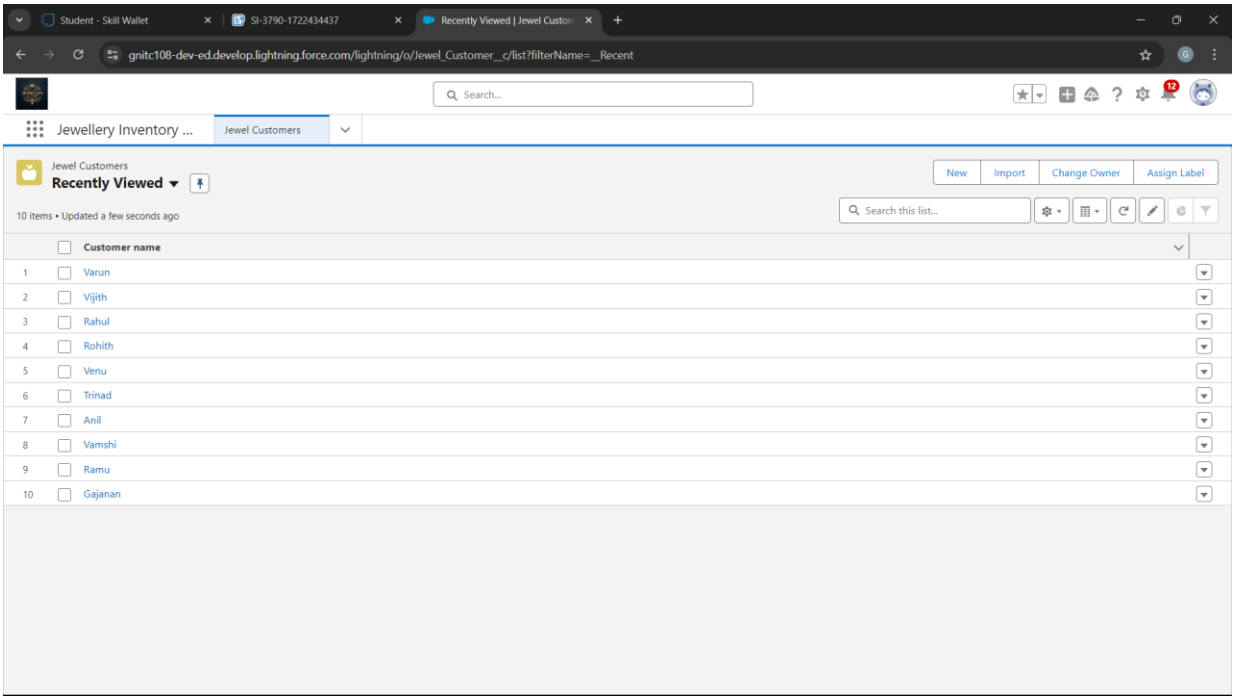
Task 14 :

User Adoption

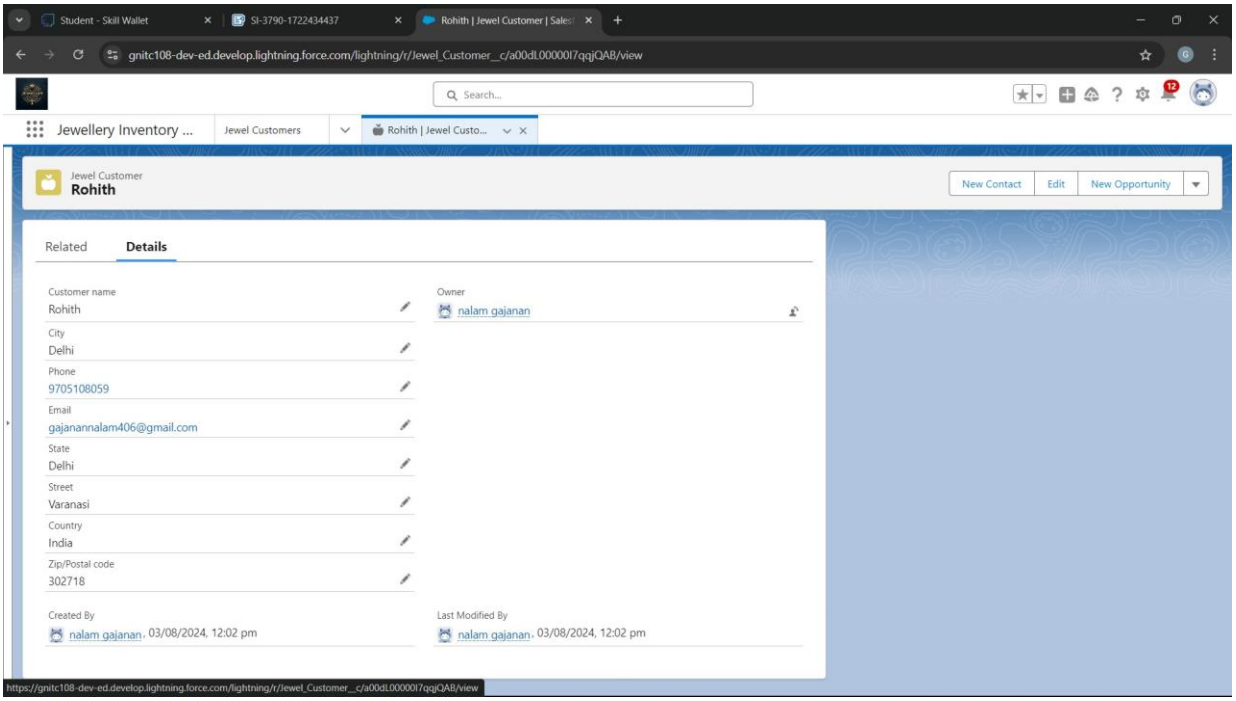
Use Case:

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)



View a Record(Jewel Customer)

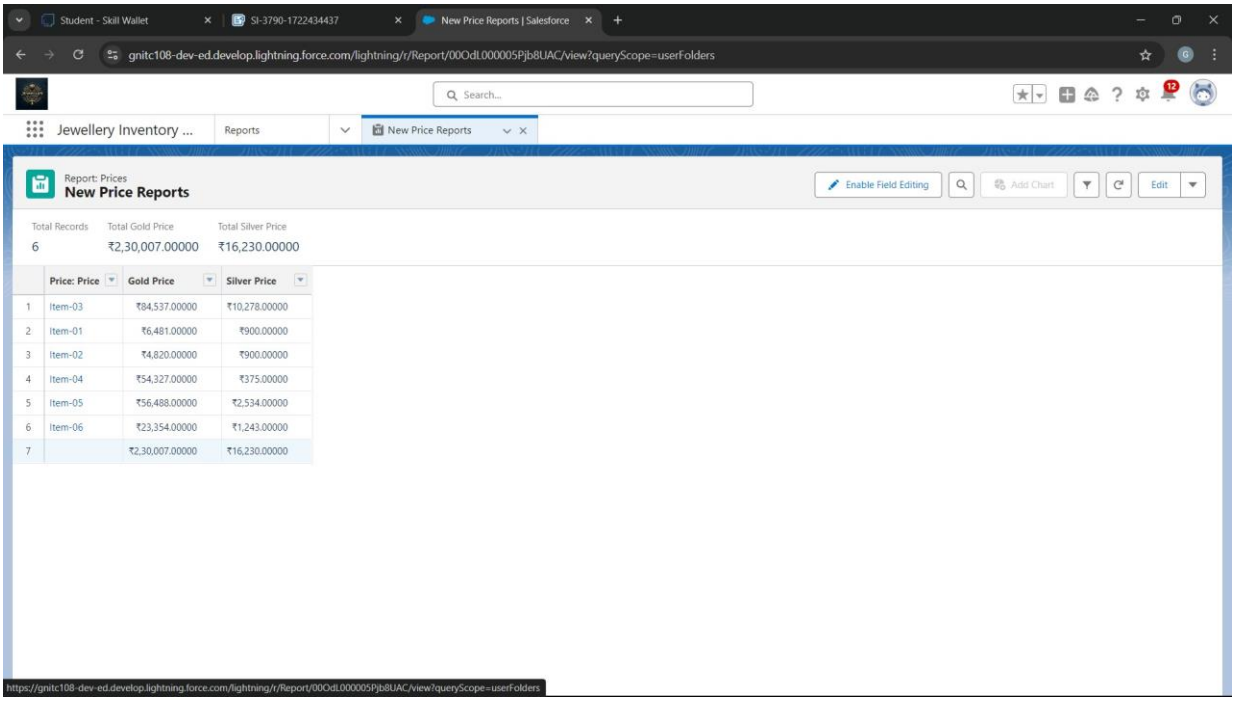


Task 15 :

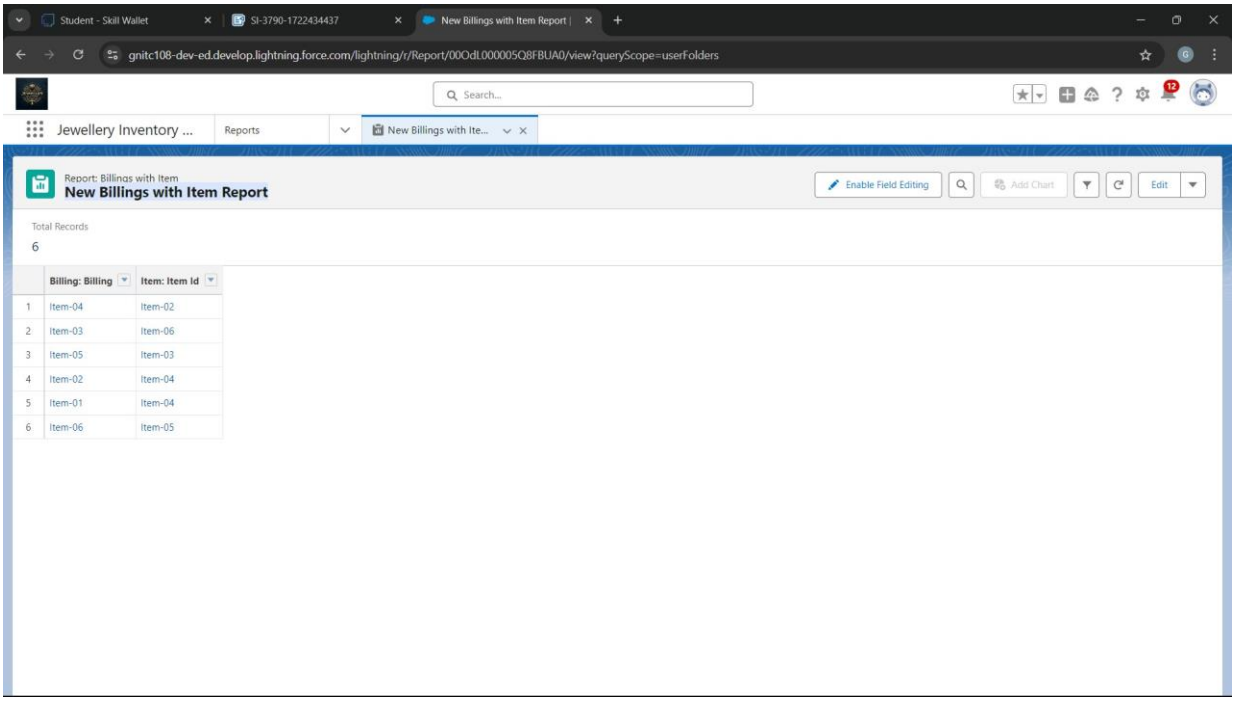
Reports

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.

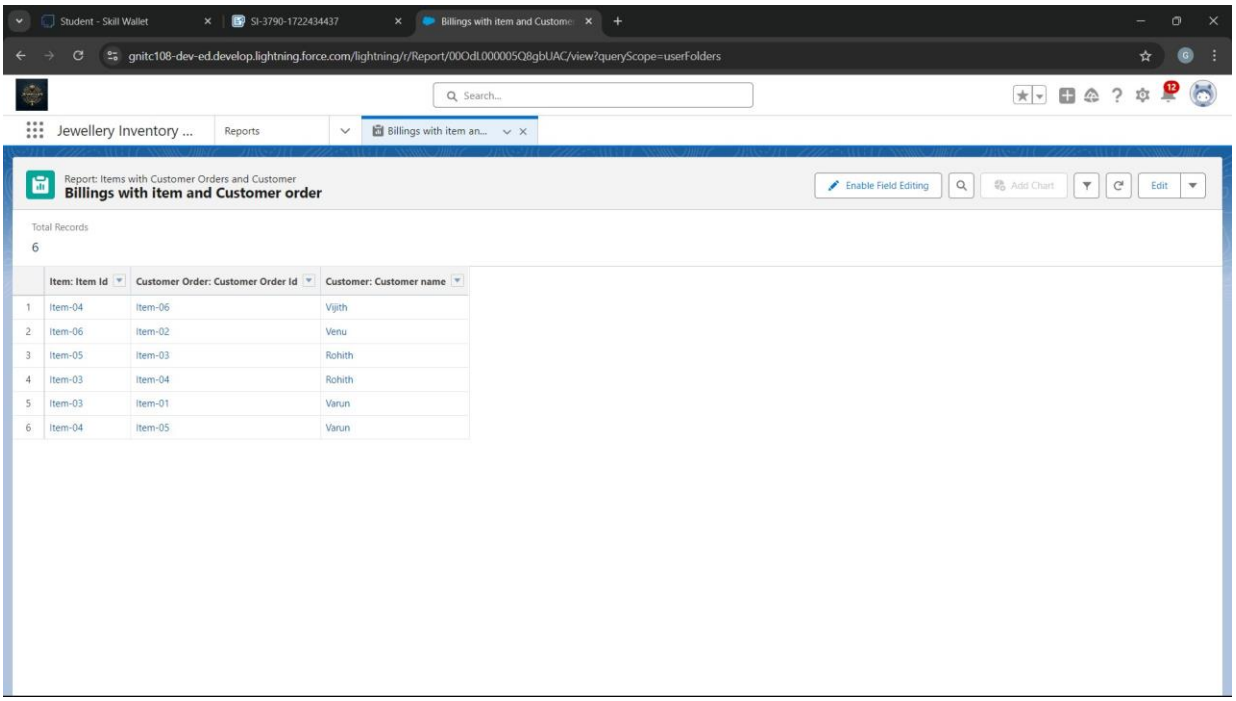
Create Report (New Price Reports)



Create Report (New Billings With Item Report)



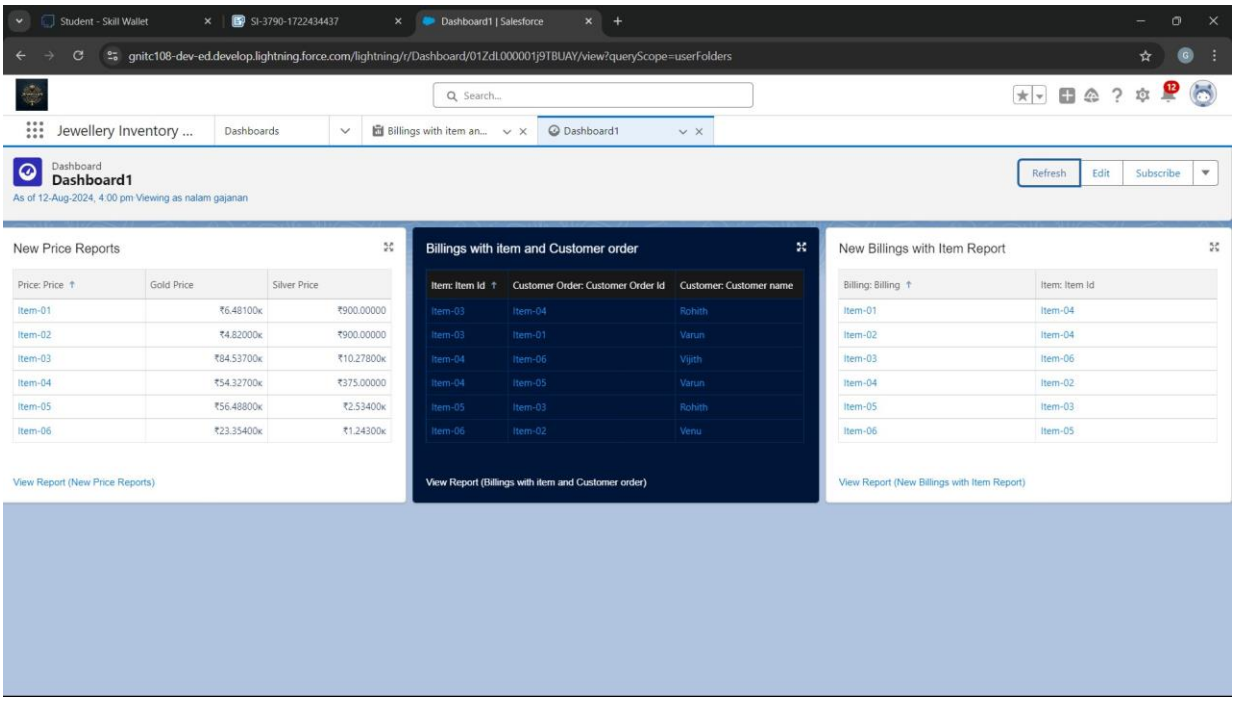
Create Report (Billings with Items and Customer Order)



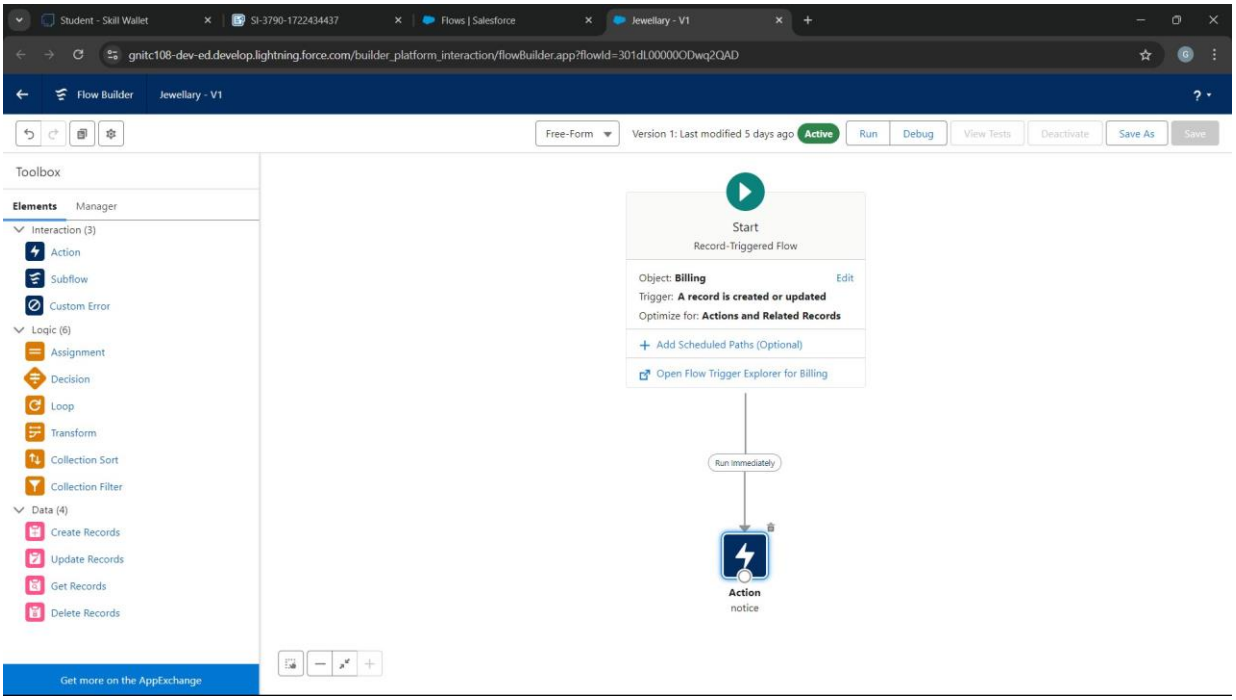
Task 16 :

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.



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.