

GOVERNMENT ART'S AND SCIENCE COLLEGE
ANTHIYUR -638501

Department of computer science

Salesforce Developer With Agent Blazer
Champion

CRM Application For Jewel Management

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Introduction

Best Jewellery ERP CRM Software for 2025: Features & BenefitsA CRM application for jewelry management is specialized customer relationship management software designed for the jewelry industry to streamline operations, boost sales, and enhance customer loyalty. These systems centralize customer data, track purchase history, and manage customer preferences to enable personalized marketing, targeted services, and improved customer communication across multiple channels. By integrating sales, inventory, and customer service functions, a jewelry CRM provides a unified platform for deeper business insights, efficient operations, and ultimately, sustained growth.

Project Overview

A project overview for a CRM application in jewel management focuses on creating a centralized system to streamline customer interactions, manage sales and inventory, personalize marketing, and analyze customer behavior to drive growth and improve customer loyalty. Key components include a client database with purchase history, automated communication tools, sales tracking, inventory management, and reporting features. The goal is to provide a unified platform that enhances operational efficiency, boosts sales, and delivers personalized customer experiences.

T

Objects

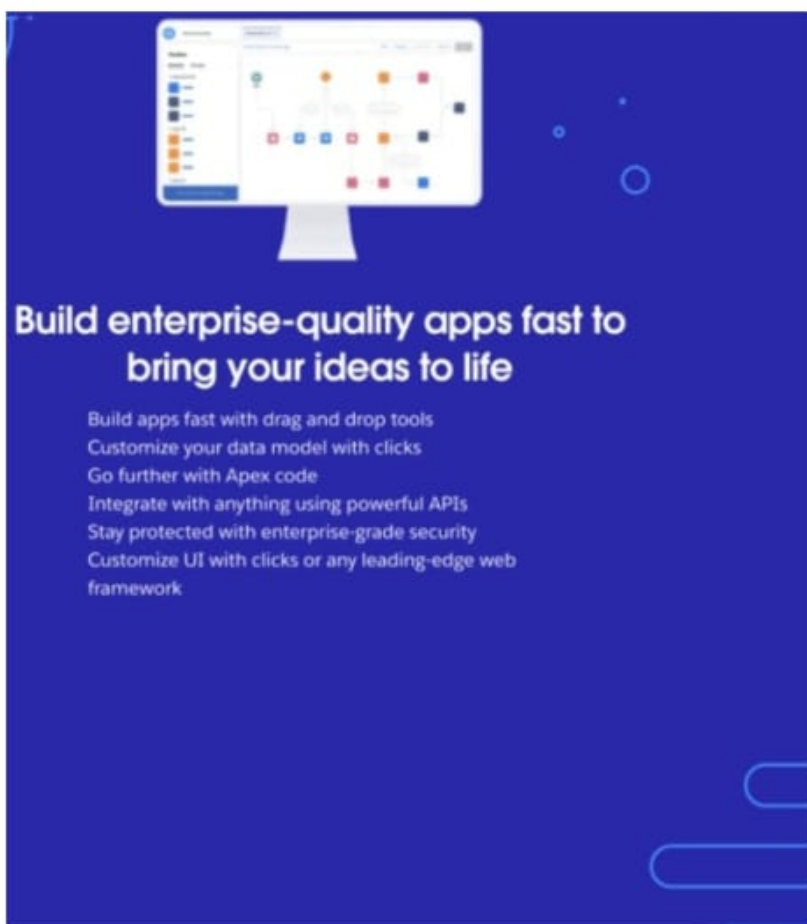
Project objectives are specific, measurable outcomes that define the purpose and success criteria of a project, guiding the team's actions and resource allocation. They are typically written using the SMART framework—Specific, Measurable, Achievable, Relevant, and Time-bound—to ensure clarity and trackability. By setting clear objectives, project managers align stakeholders, provide direction, and establish a basis for evaluating the project's success.


Salesforce

Creating Developer Account

Creating a developer org in salesforce.

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





Sign up for your Salesforce Developer Edition

A full-featured copy of the Platform, for free

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

First Name*

Last Name*

Email*

Role*

Company*

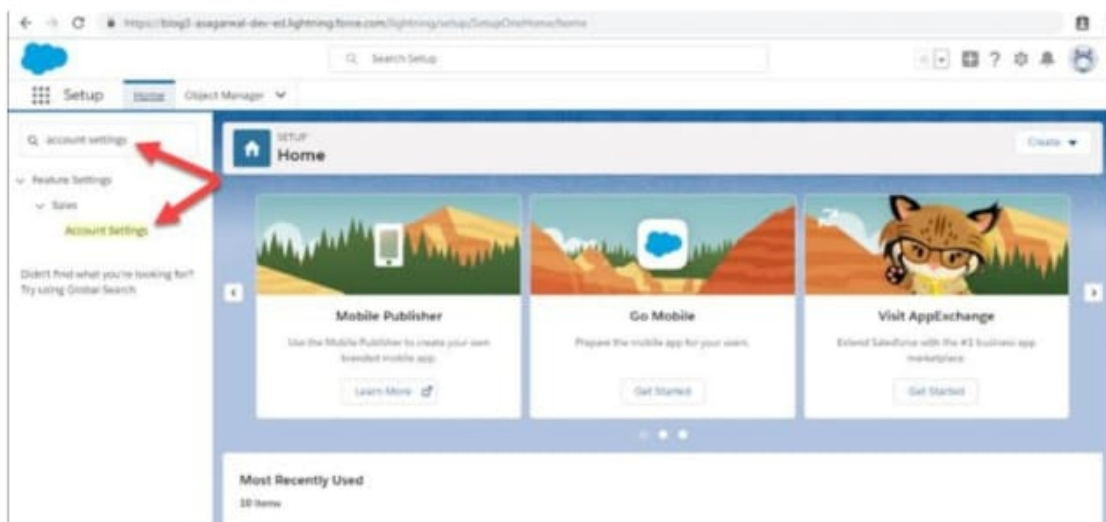
Country/Region*

Postal Code*

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.

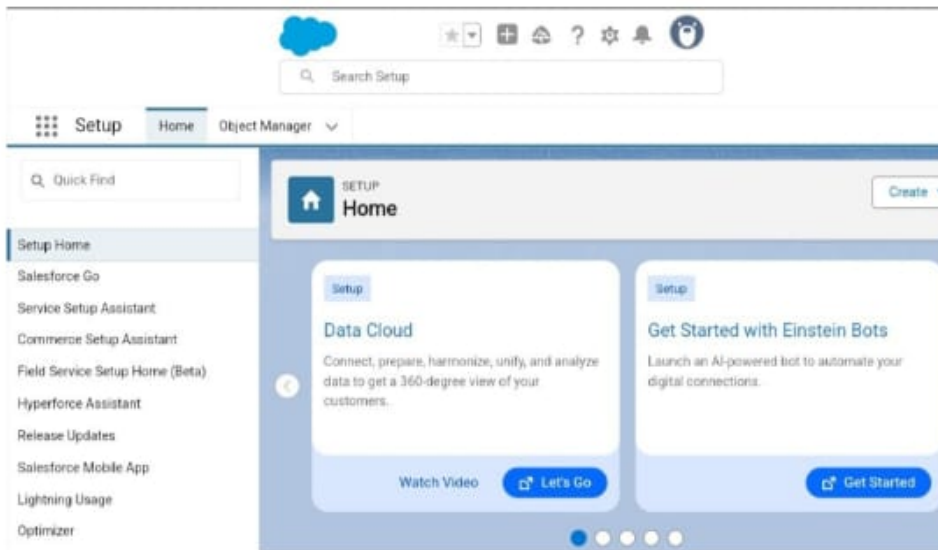
Account Activation

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



CREATE JEWEL CUSTOMER OBJECT

- The purpose of creating a Jewel Customer custom object is to store and manage information.
- From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.



- Enter the label name : Jewel CUSTOMER
- Plural label name : Jewel Customers

This screenshot shows the 'New Custom Object' page in Salesforce Setup. The page title is 'New Custom Object'. Below the title, there is a yellow banner with a message about permissions. The main section is 'Custom Object Definition Edit', which includes a 'Custom Object Information' tab. This tab contains fields for 'Label' (with an example 'Account'), 'Plural Label' (with an example 'Accounts'), 'Object Name' (with an example 'Account'), and a 'Description' text area. There are also checkboxes for 'Starts with vowel sound' and 'Context-Sensitive Help Setting'.

- Enter Record Name Label and Format
RECORD NAME >> CUSTOMER NAME
- DATA TYPE >> TEXT

Enter Record Name Label and Format

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

Record Name Example: Account Name

Data Type Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

☐ Allow Reports
☐ Allow Activities
☐ Track Field History
☐ Allow in Chatter Groups
☐ Enable Licensing [?](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#)

☒ Allow Sharing
☒ Allow Bulk API Access
☒ Allow Streaming API Access

Deployment Status [What is this?](#)

☐ In Development
☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#)

☐ Allow Search

Object Creation Options (Available only when custom object is first created)

☐ Add Notes and Attachments related list to default page layout
☐ Launch New Custom Tab Wizard after saving this custom object

- Click on Allow reports.
- Allow search and click Save.

Create Item Object

The purpose of creating a Item object is to manage the inventory of gold and silver items.

TO CREATE AN OBJECT:

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

- From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
- Enter the label name >> Item
- Plural label name >> Items
- Enter Record Name Label and Format
- Data Type >> Auto Number
- Display Format >> Item-{00}

Starting Number >> 1

- Click on Allow reports.

Allow search >> Save.

TABS

Creating a Custom Tab

To create a Tab:(Customer)

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

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'Tabs' entered. Under 'User Interface', 'Rename Tabs and Labels' is selected, and 'Tabs' is highlighted. The main content area is titled 'New Custom Object Tab' and shows 'Step 1 of 3: Enter the Details'. It prompts the user to 'Choose the custom object for this new custom tab. Fill in other details.' There are fields for 'Object' (set to 'None'), 'Tab Style' (set to 'None'), and 'Splash Page Custom Link' (set to 'None'). A description field is also present. A 'Next' button is at the bottom right.

To create a Tab:(Item)

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

The Lightning App

To create a lightning app page:

- Go to setup page >> search “app manager” in quick find >> select “app manager” >>
- click on New lightning App.

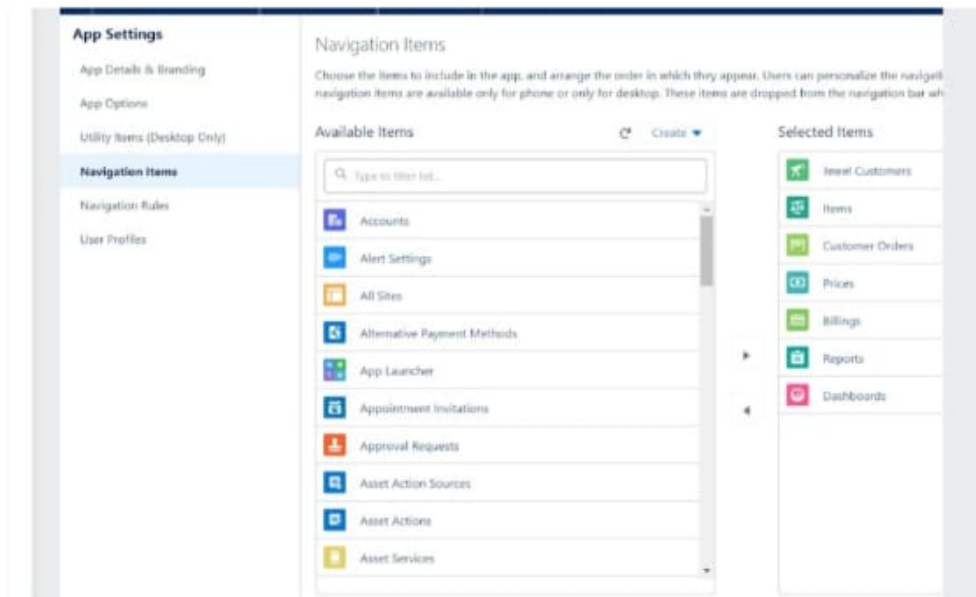
The screenshot shows the Salesforce Setup interface for the 'Lightning Experience App Manager'. The left sidebar has a search bar with 'App manager' entered. Under 'Apps', 'App Manager' is selected, and 'External Client App Manager' is highlighted. The main content area is titled 'Lightning Experience App Manager' and has buttons for 'New Lightning App' and 'New External Client App'. Below these is a table listing 27 items, sorted by App Name. The table has columns for App Name, Developer Name, Description, Last Modified, App Type, and a checkbox. The first row is 'All Tabs' with developer 'AllTabSet' and app type 'Classic'. The second row is 'Analytics Studio' with developer 'Insights' and app type 'Classic'. The third row is 'App Launcher' with developer 'AppLauncher' and app type 'Classic'. The fourth row is 'Approvals' with developer 'Approvals' and app type 'Lightning'. The fifth row is 'Automation' with developer 'FlowsApp' and app type 'Lightning'. The sixth row is 'Bolt Solutions' with developer 'LightningBolt' and app type 'Lightning'. The seventh row is 'Community' with developer 'Community' and app type 'Classic'.

| | App Name | Developer N... | Description | Last Modifie... | App ... | VL... |
|---|------------------|----------------|-------------------|-----------------|-----------|-------|
| 1 | All Tabs | AllTabSet | | 8/9/2025, 2:26 | Classic | |
| 2 | Analytics Studio | Insights | Build CRM Anal... | 8/9/2025, 2:26 | Classic | ✓ |
| 3 | App Launcher | AppLauncher | App Launcher t... | 8/9/2025, 2:26 | Classic | ✓ |
| 4 | Approvals | Approvals | Manage approv... | 8/9/2025, 2:26 | Lightning | ✓ |
| 5 | Automation | FlowsApp | Automate busi... | 8/9/2025, 2:33 | Lightning | ✓ |
| 6 | Bolt Solutions | LightningBolt | Discover and m... | 8/9/2025, 2:26 | Lightning | ✓ |
| 7 | Community | Community | Salesforce CR... | 8/9/2025, 2:26 | Classic | ✓ |

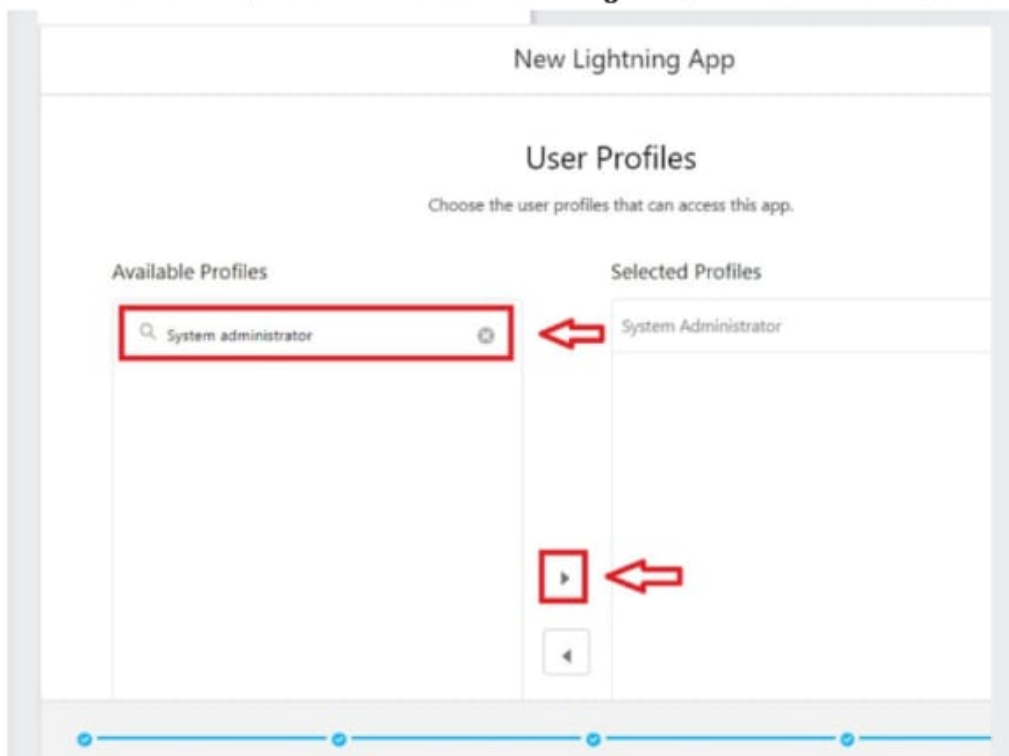
- Fill the app name in app details and branding as follow
App Name : Jewellery Inventory System.
 - Developer Name : This will auto populatedescription : Elevate your look with eleganed
Image :
 - optional (if you want to give any image you can otherwise not mandatory)
- Primary colour hex value : keep this default.

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

- **UTILITY ITEMS) KEEP IT AS DEFAULT >> NEXT.**
- **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.



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

FIELDS

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.
- Go to the setup page >> click on object manager >> type object name(Customer Order) in the quick find bar >> click on the object.
- Click on fields & relationship >> click on New.
- Select "Lookup relationship" as data type and click Next
- Select the related object " Jewel Customer ".
- Give Field Label as "Customer" and click Next.

Next >> Next >> Save.

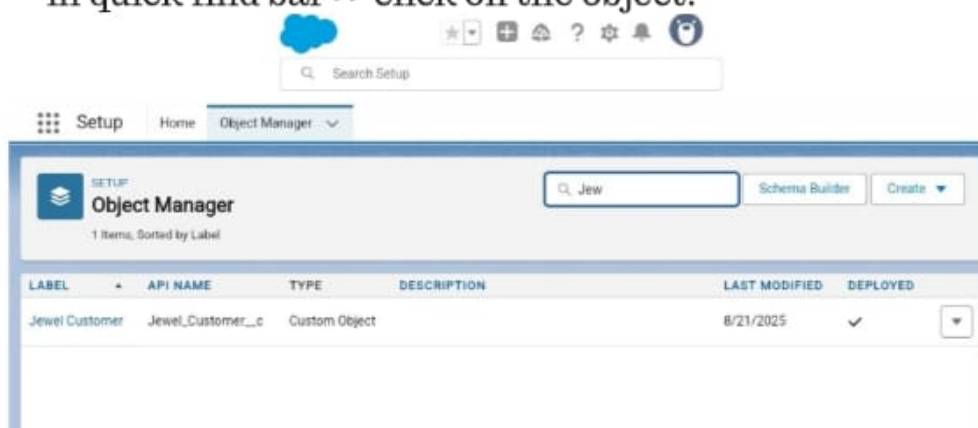
Creating a Master-Detail Relationship

- 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:

Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.



- Now click on “Fields & Relationships” >> New

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

Field Quick Find

New Deleted Fields Field Dependencies Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| City | City__c | Text(20) | | |
| Created By | CreatedById | Lookup(User) | | |
| Customer | Name | Text(80) | | ✓ |
| Email | Email__c | Email | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Phone | Phone__c | Phone | | |

- Select Data type as “Text”.

Phone

Picklist

Picklist (Multi-Select)

Text

Text Area

Text Area (Long)

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

- Click on Next

Setup > OBJECT MANAGER
Jewel Customer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Jewel Customer
New Custom Field

Help for this Page

Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

Field Label City

Please enter the maximum length for a text field below.

Length 18

Field Name City__c

Description

Help Text

Required ☐ Always require a value in this field in order to save a record

Fill the above as following:

Field Label: City

Length : 20

Field Name : gets auto generate Click on Next >> Next >> Save and new.

Creating the Phone field in object Jewel Customer

- Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.
- Now click on “Fields & Relationships” >> Select Data type as “Phone” and click Next.
- Given the Field Label as “ Phone”.

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the 'Jewel Customer' object is selected. The left sidebar shows a list of options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'New Custom Field' and shows 'Step 2 of 4: Enter the details'. The 'Field Label' is 'Phone', the 'Default Value' is 'Unchecked', and the 'Field Name' is 'Phone'. The 'Description' and 'Help Text' fields are empty.

FIELD NAME WILL BE AUTO POPULATED, AND CLICK ON NEXT >> NEXT >> SAVE & NEW.

CREATING THE EMAIL FIELD IN OBJECT JEWEL CUSTOMER

- Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.
- NOW CLICK ON “FIELDS & RELATIONSHIPS” >> NEW
- Select Data type as “Email” and click Next.
- Given the Field Label as “ Email”.
- Field Name will be auto populated, and click on Next >> Next >> Save.

CREATING PICKLIST FIELD IN ITEM OBJECT

- Go to setup >> click on Object Manager >> type object name(Item) in quick find bar>> click on the object.
- Now click on “Fields & Relationships” >> New
- Select Data type as “Picklist” and click Next.
- Enter Field Label as “Item Type”.
- 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 for creating a new custom field for the 'Item' object. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area is titled 'New Custom Field' and 'Step 2: Enter the details'. The 'Field Label' is 'Item Type'. The 'Values' section shows 'Use global picklist value set' selected, with a list of values: 'Gold' and 'Silver'. The 'Field Name' is 'Item_Type'. The 'Description' field is empty.

Click Next? Next ? Next ? Save .

Creating Currency Field in Price Object

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

The screenshot shows the Salesforce Setup interface for creating a new custom field for the 'Price' object. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area is titled 'New Custom Field' and 'Step 2: Enter the details'. The 'Field Label' is 'Gold price'. The 'Field Name' is 'Gold_price'. The 'Description' field is empty. The 'Help Text' field is empty.

- ENTER FIELD LABEL AS "GOLD PRICE" AND LENGTH AS " 8"AND DECIMAL 0.FIELD NAME WILL BE AUTO GENERATED

- CLICK NEXT >> NEXT >> NEXT >> SAVE .

Creating Formula Field(Cross Object) in Item Object

- Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
- Now click on "Fields & Relationships" >> New.
- Select Data type as "Formula" and click Next.
- Give Field Label and Field Name as "Gold Price" and select formula return type as "Currency" and click next.

The screenshot shows the Salesforce Setup interface. In the left sidebar, 'Setup' is selected, and 'Object Manager' is chosen from the dropdown. Under 'Object Manager', 'Item' is selected. The 'Fields & Relationships' tab is active, and the 'New Custom Field' wizard is in 'Step 2: Choose output type'. The 'Field Label' is 'Gold price'. The 'Auto add to custom report type' checkbox is checked. Under 'Formula Return Type', 'Currency' is selected. The right side of the screen provides examples for different return types: Boolean (e.g., `TODAY() > CloseDate`), Currency (e.g., `Gross Margin = Amount - Cost_c`), Date (e.g., `Summative Date + CloseDate - 7`), DateTime (e.g., `Next = NOW() + 1`), and Number (e.g., `Fahrenheit = 1.8 * Celsius_c + 32`).

- Under Advanced Formula write down the formula :Prices__r.Gold_price__c / 10.

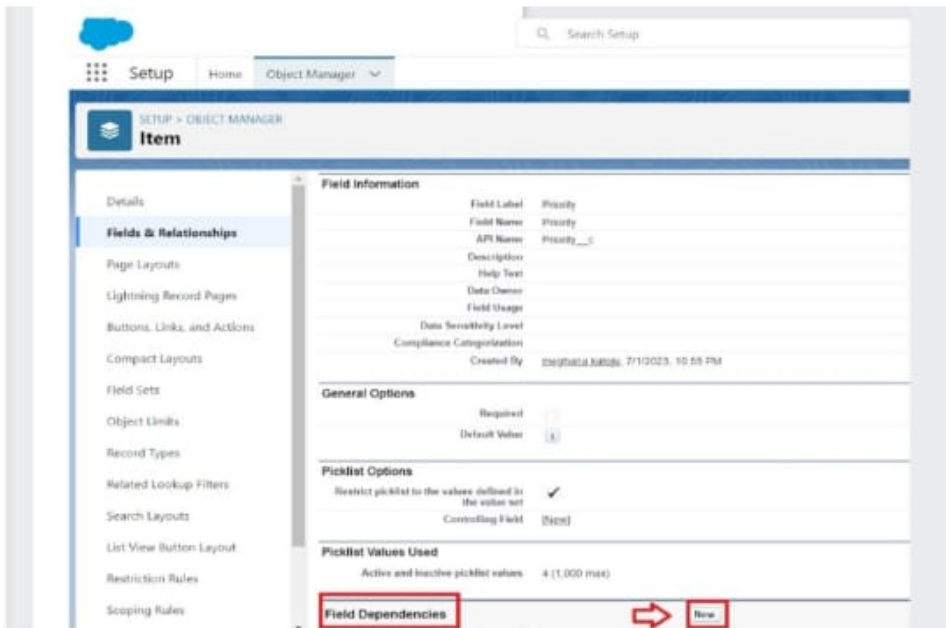
The screenshot shows the 'Step 3: Enter formula' screen of the 'New Custom Field' wizard. The 'Simple Formula' tab is selected. The formula entered in the text area is `:Prices__r.Gold_price__c / 10`. The 'Insert Field' button is visible, and the 'Insert Operator' dropdown is set to '/'. The right side of the screen provides instructions on how to use the formula builder, including a link to 'More Examples...'.

- click "Check Syntax" and Next >> Next >> Save & New.

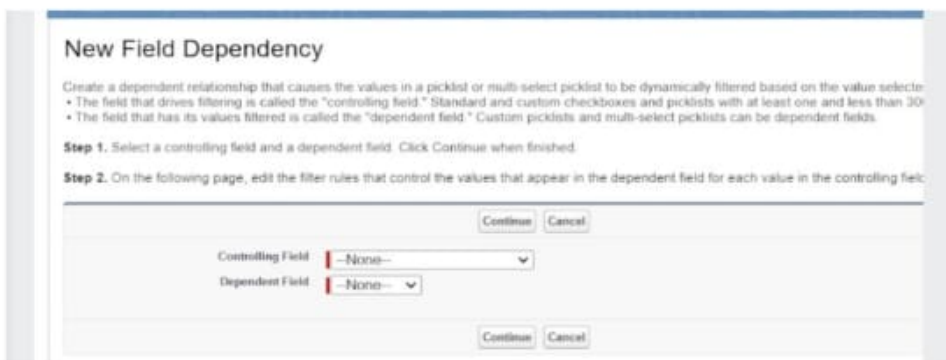
Creating the Field Dependencie

Use case:

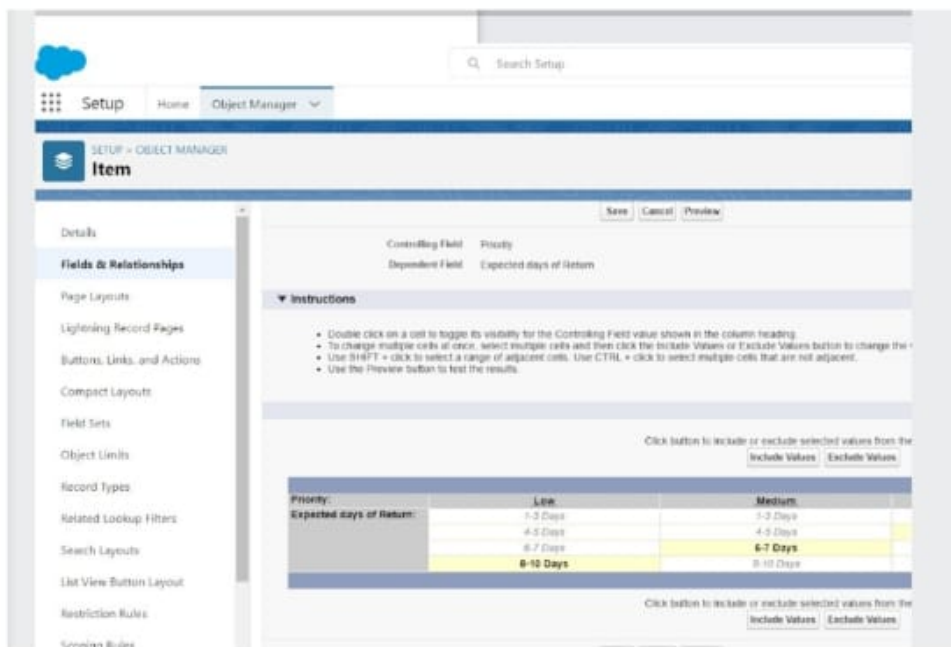
- Field Dependencies are used to create relationships between fields within an object. They allow you to control the visibility and availability of fields based on the values selected in other fields.
- Go to setup >> click on Object Manager >> type object name(Item) in quick find bar >> click on the object.
- Click on Fields & Relationships and click on the Priority field
- Search for Field Dependencies and click on New.



- **SELECT CONTROLLING FIELD AS "PRIORITY" AND DEPENDING FIELD AS "EXPECTED DAYS OF RETURN" >> CONTINUE.**

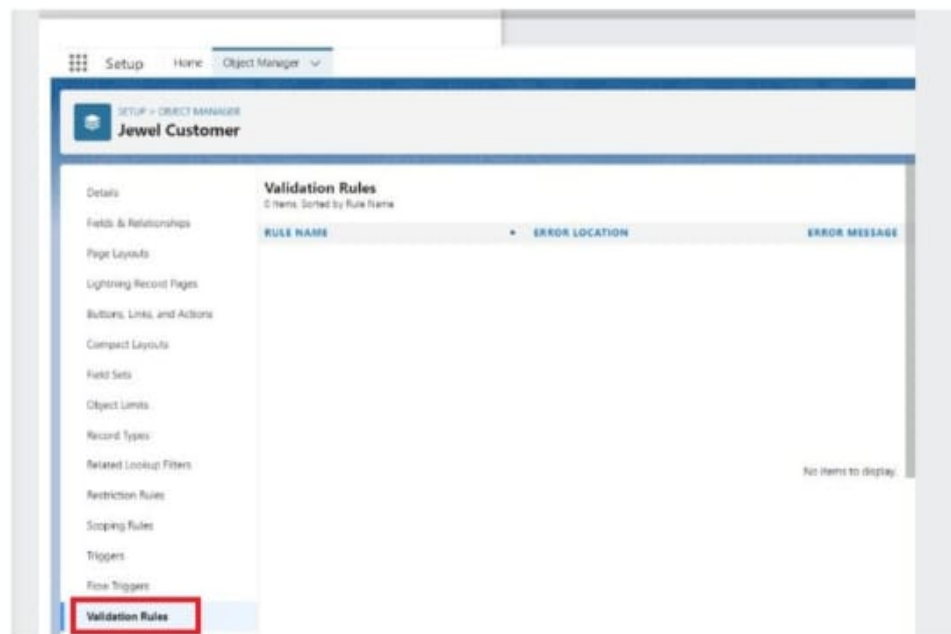


Select the "Expected Days of Return" values of related Priority values and Click on Include Values >> Save



Creating the validation rule

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



- Enter the Rule name as "Postal Code ".
- Insert the Error Condition Formula as : -
- Insert the Error Condition Formula as : -
- Insert the Error Condition Formula as : -
- AND(
- OR(
- LEN(Zip_Postal_code__c) <> 6,
- NOT(REGEX(Zip_Postal_code__c, "[0-9]{6}\$"))),
- NOT(ISBLANK(Zip_Postal_code__c))
-)
-)

Validation Rule Edit

Rule Name: 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

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

Functions

-- All Function Category

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

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

Help on this function

- 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.

Gold Smith Profile

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

Setup

Home Object Manager

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Clone Profile

Enter the name of the new profile

You must select an existing profile to clone from.

Existing Profile: System Administrator

User License: Salesforce

Profile Name: Gold Smith

Save Cancel

- While still on the profile page, then click Edit.
- Scroll down to Custom Object Permissions and Give access permissions for Jewel Customer, Item, Customer Order, Prices, Billings .

| | Basic Access | | | | Data Administration | |
|------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| | Read | Create | Edit | Delete | View All | Modify All |
| Assets | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Asset Services | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Billings | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Book1 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Book2 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Bot Commands | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Brokers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Buyers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Candidates | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Customer Orders | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

- Scroll down and Click on Save.

Worker Profile

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

Roles

Creating Gold Smith Role

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

Setup Home Object Manager

Quick Find:

Left Sidebar: **Roles**

Understanding Roles

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

Sample Role Hierarchy: Territory-based Sample

View other sample Role Hierarchies:

Diagram illustrating a Sample Role Hierarchy (Territory-based Sample):

- Executive Role** (CEO, President, CFO, VP, Sales)
 - Western Sales Director** (Director of W. Sales)
 - Western Sales Rep** (SA Sales Rep, CR Sales Rep)
 - Eastern Sales Director** (Director of E. Sales)
 - Eastern Sales Rep** (SE Sales Rep, NE Sales Rep)
 - International Sales Director** (Director of Int'l Sales)
 - International Sales Rep** (ASIAN Sales Rep, European Sales Rep)

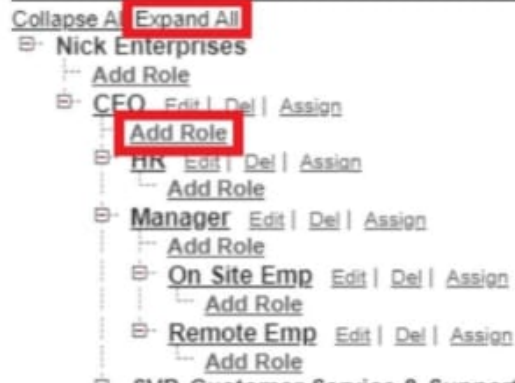
Notes:

- * View & edit data, not up: Associates & generate reports for all users below.
- * Can't access data of other: Executive Role
- * View & edit data, not up: Associates & generate reports for all users below.
- * Can't access data of other: Western Sales Director
- * View & edit data, not up: Associates & generate reports for all users below.
- * Can't access data of other: Eastern Sales Director
- * View & edit data, not up: Associates & generate reports for all users below.
- * Can't access data of other: International Sales Director

Buttons: **Set Up R**, ☐ Don't show this

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

Your Organization's Role Hierarchy



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

Setup Roles

Role Edit: Gold Smith

Role Edit

Label: Gold Smith

Role Name: Gold_Smith

This role reports to: CEO

Role Name as displayed on reports: Gold Smith

Save Save & New Cancel

USER

GO TO SETUP >> TYPE USERS IN QUICK FIND BOX >> SELECT USERS >> CLICK NEW USER.

FILL IN THE FIELDS

- FIRST NAME : NIKLAUSLAST
- LAST NAME : MIKAELSON
- ALIAS : GIVE A ALIAS NAME
- USERNAME : USERNAME SHOULD BE IN THIS FORM:
TEXT@TEXT.TEXT
- NICK NAME : GIVE A NICKNAME
- ROLE : GOLD SMITH
- PROFILES : GOLD SMITH

Manager

Search Setup

Users

User ID: Niklaus Mikaelson

User Edit

General Information

First Name: Niklaus

Last Name: Mikaelson

Alias: nmkg

Email: niklaus@mikaelson.org

Username: niklaus@mikaelson.org

Nickname: niklaus

Title:

Company:

Department:

Street:

Role: Worker

User License: Salesforce Platform

Profile: Worker

Action:

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Mobile App Developer User

ADC User

Tablet User Type

Database Metadata Addition Limit

Accountability Mode (Classic Only)

App-Generated Patches on Change

Load Lightning Pages While Scrolling

Debug Mode

Send App Warning Emails

Create User

- Go to setup >> type users in quick find box >> select users >> click New user.
- Fill in the fields

First Name : Kol

Last Name : Mikaelson

Alias : Give a Alias Name

Email id : Give your Personal Email id

Username : Username should be in this form: text@text.text

Nick Name : Give a Nicknam

Role : Worker

User licence : Salesforce Platforms

Profiles : Worker

page layout

To Create a Gold Page layout

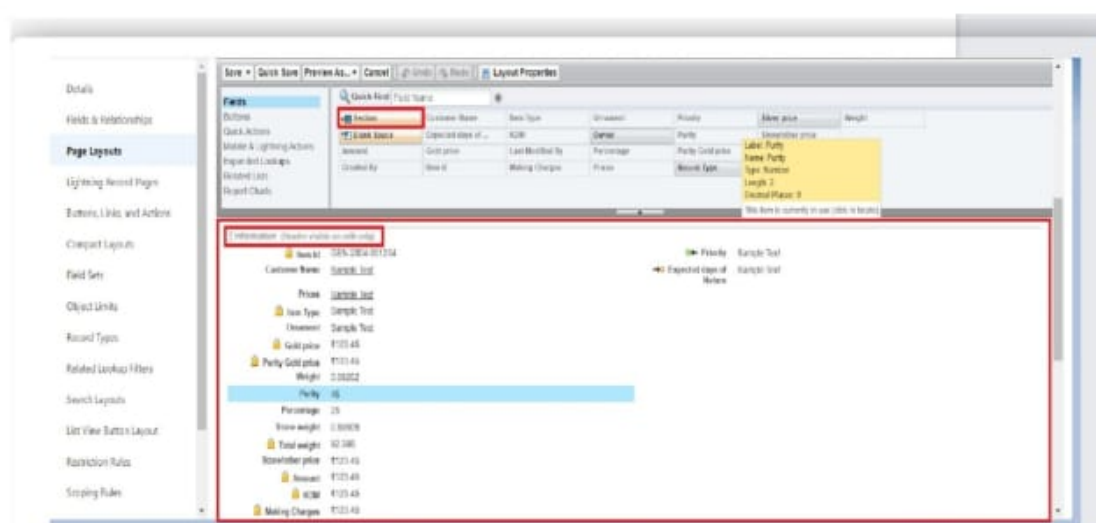
1. Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.
2. Click on Page layout >> Click on New.



3. Give Page layout Name as “Page Layout for Gold” and click on Save and New.



4. Arrange the field as shown in the Information Section ,remove fields which are related to Silver and click Ok.

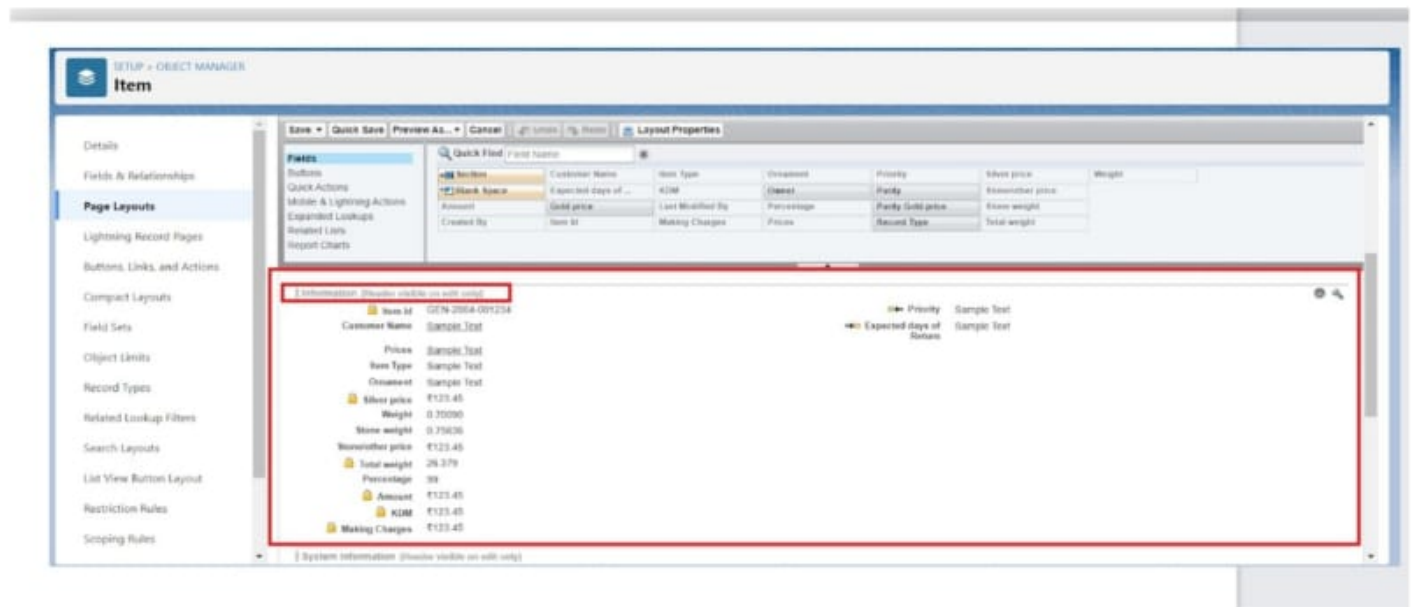


5. Click Save.

6. Make sure your page layout looks like the picture above.

To Create a Silver Page layout

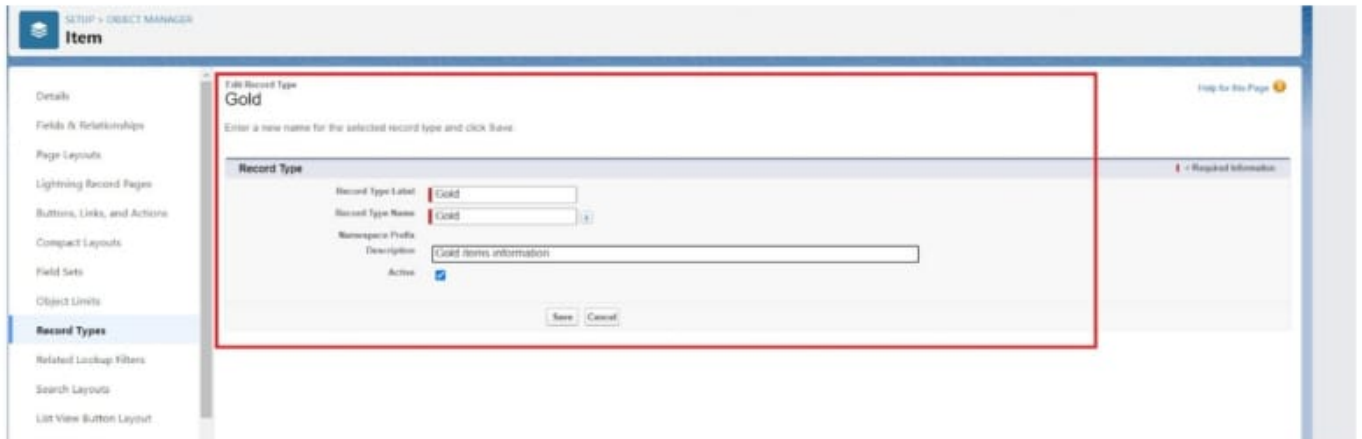
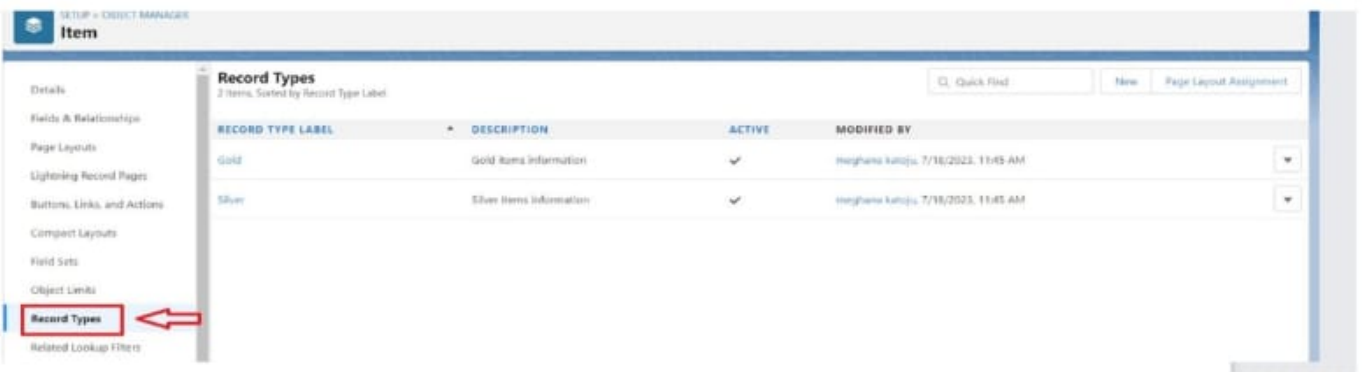
- 1.Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.
- 2.Click on Page layout >> Click on New.
- 3.Give Page layout Name as “Page Layout for Silver” and click on Save.
- 4.Arrange the field as shown in the Information Section ,remove fields which are related to Gold and click Ok.



Record type

To create a Record Type

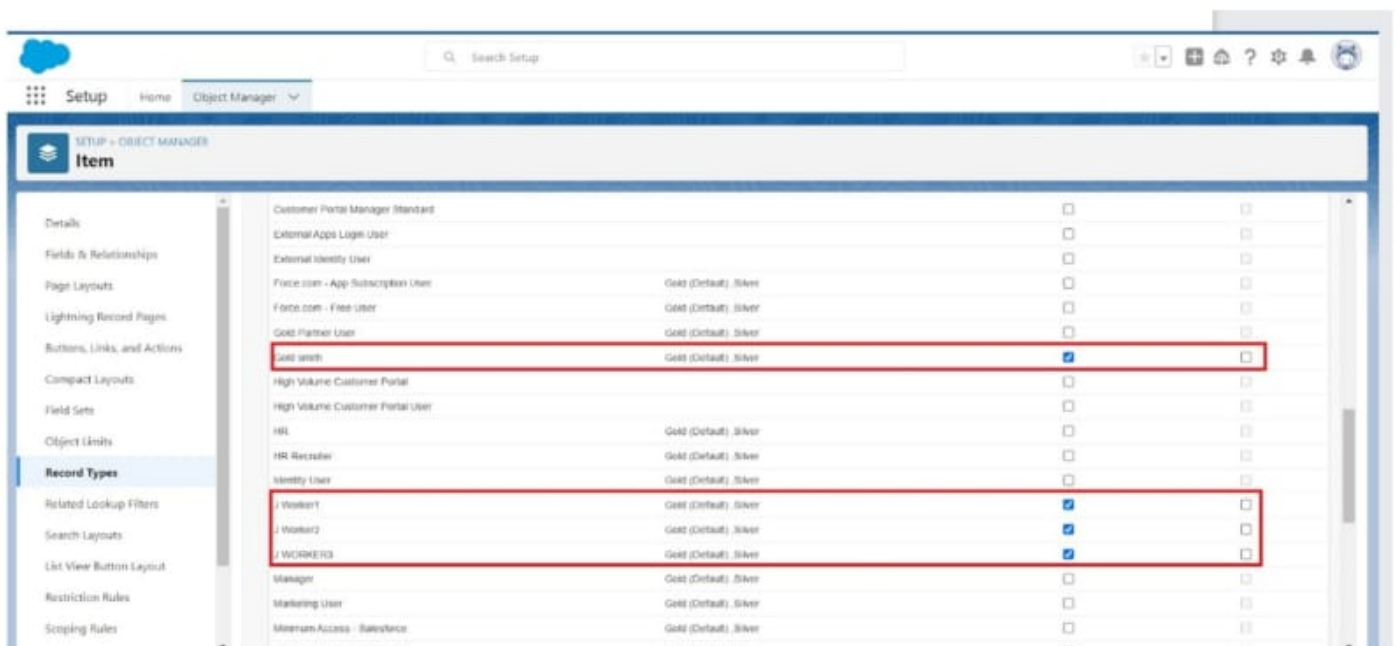
- 1.Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
- 2.Click on the Record Types >> click New.
- 3.Select Existing Record as “Master”,Record type Label as “Gold”,Description as “Gold items information”.



4. Uncheck for "Make Available".



5. Scroll down and check for the Gold Smith, Worker JW & System Administrator profile and click on next



6. Select “Apply a different layout for each profile”, and change page layout to “Page Layout for Gold” for Gold Smith, Worker and System Administrator ? save & new.

| | |
|---|------------------------|
| Force.com - Free User | Item Layout ▼ |
| Gold Partner User | Item Layout ▼ |
| Gold smith | Page layout for Gold ▼ |
| High Volume Customer Portal | Item Layout ▼ |
| High Volume Customer Portal User | Item Layout ▼ |
| HR | Item Layout ▼ |
| HR Recruiter | Item Layout ▼ |
| Identity User | Item Layout ▼ |
| Manager | Item Layout ▼ |
| Marketing User | Item Layout ▼ |
| Minimum Access - Salesforce | Item Layout ▼ |
| Partner App Subscription User | Item Layout ▼ |
| Partner Community Login User | Item Layout ▼ |
| Partner Community User | Item Layout ▼ |
| Read Only | Item Layout ▼ |
| s1 | Item Layout ▼ |
| Salesforce API Only System Integrations | Item Layout ▼ |
| Sales User | Item Layout ▼ |
| Sales User. | Item Layout ▼ |

| | |
|---|------------------------|
| Minimum Access - Salesforce | Item Layout ▼ |
| Partner App Subscription User | Item Layout ▼ |
| Partner Community Login User | Item Layout ▼ |
| Partner Community User | Item Layout ▼ |
| Read Only | Item Layout ▼ |
| s1 | Item Layout ▼ |
| Salesforce API Only System Integrations | Item Layout ▼ |
| Sales User | Item Layout ▼ |
| Sales User. | Item Layout ▼ |
| Silver Partner User | Item Layout ▼ |
| Solution Manager | Item Layout ▼ |
| Standard Platform User | Item Layout ▼ |
| Standard User | Item Layout ▼ |
| Support User | Item Layout ▼ |
| Support User. | Item Layout ▼ |
| System Administrator | Item Layout ▼ |
| Work.com Only User | Item Layout ▼ |
| Worker | Page layout for Gold ▼ |

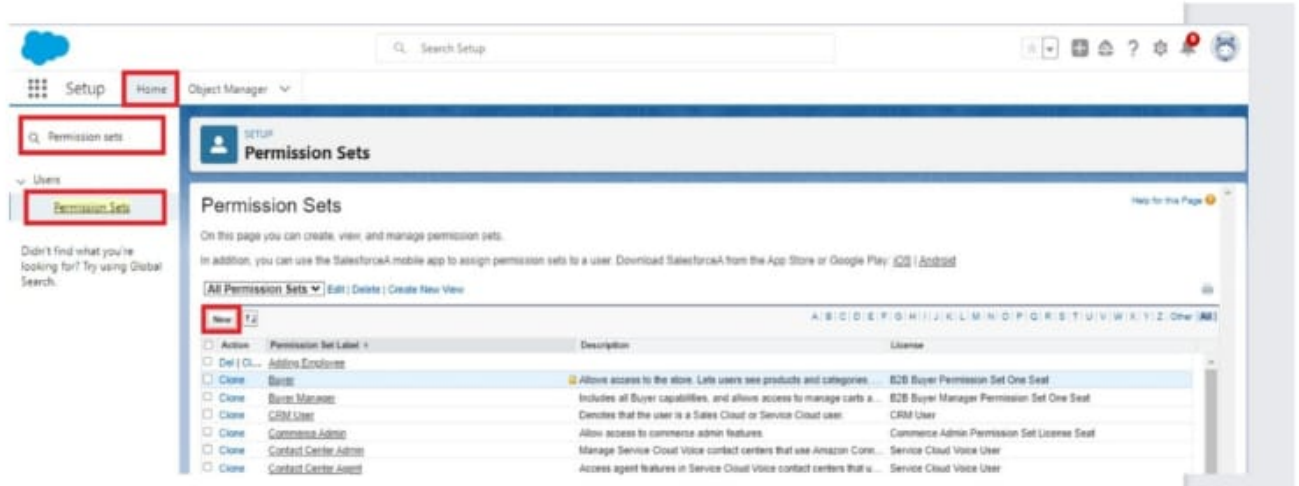
Activity 2: Create another Record Type with name “Silver” following the steps from Activity 1.

permission set

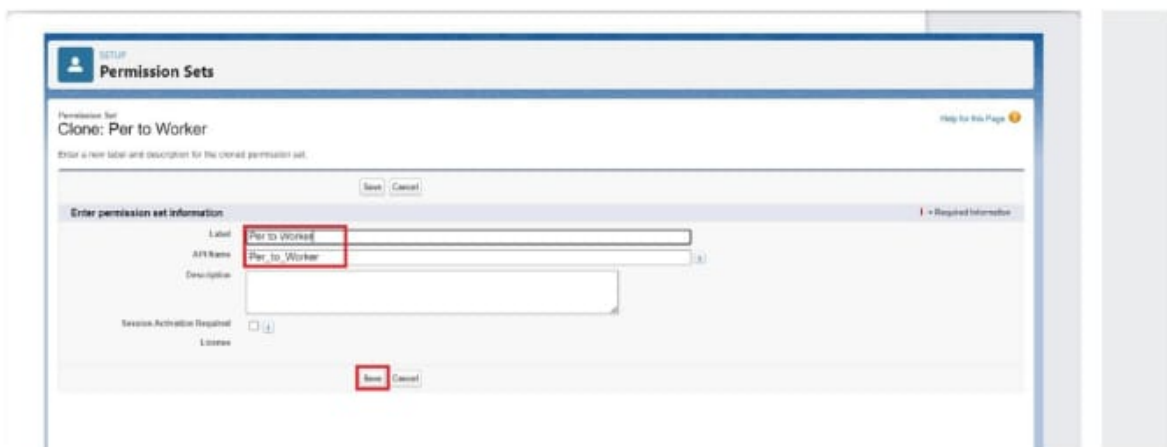
Creating permission set

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

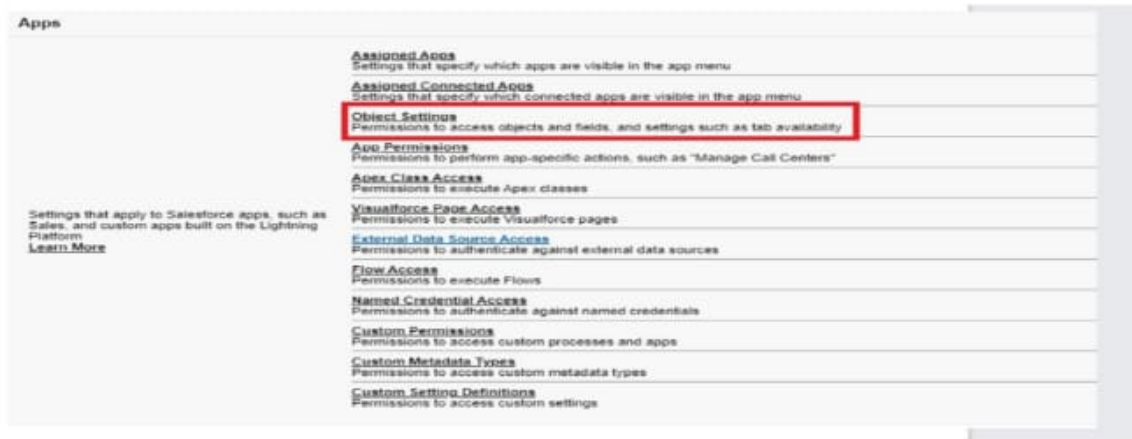
1. Go to setup >> type “permission sets” in quick search >> select permission sets >> New.



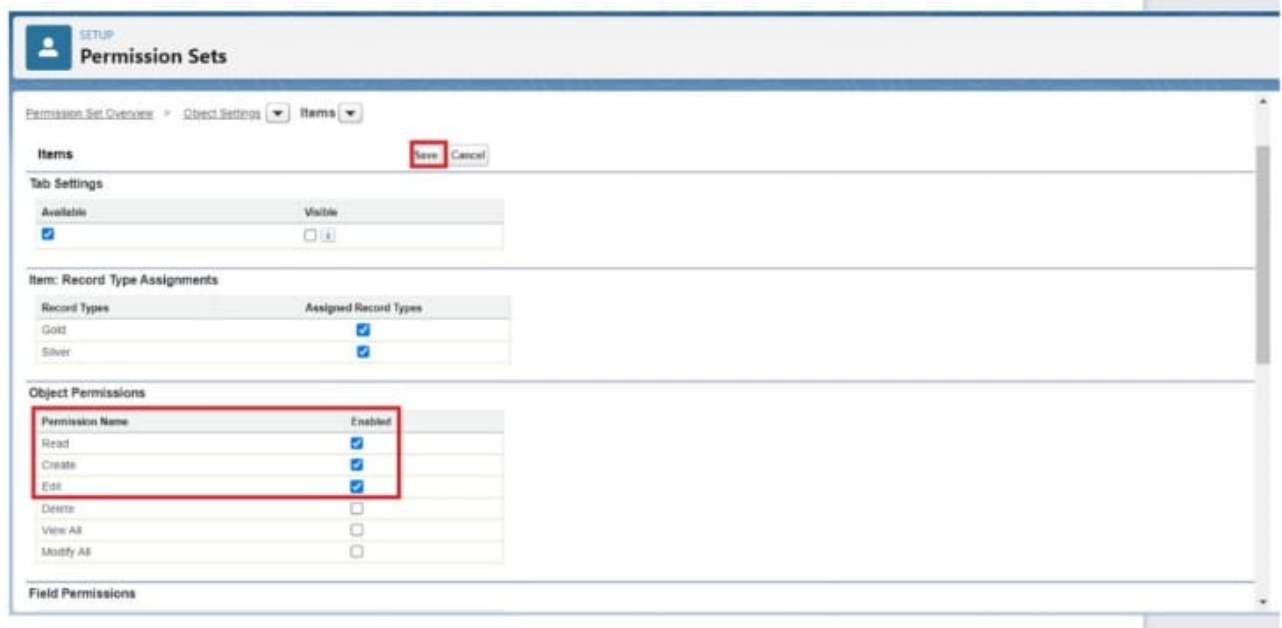
2. Enter the label name as “Per to Worker”, API will be auto populated?



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.

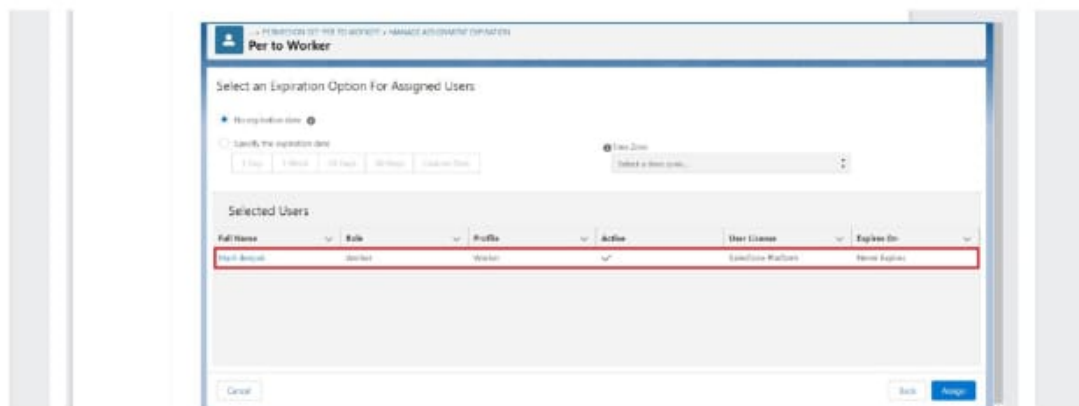
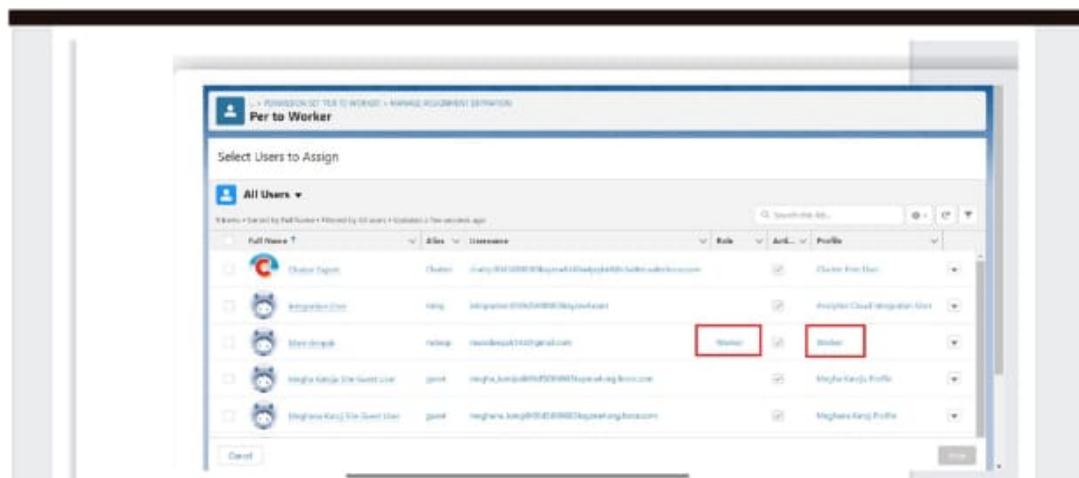


5. Click on Save.

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.



Trigger

Create a Trigger Handler class

Trigger handler

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

CODE:

```
public class UpdatePaidAmountTriggerHandler {

    public static void handleBeforeInsert(List<Billing_c> newBillings) {

        for (Billing_c billing : newBillings) {

            billing.Paid_Amount_c = billing.Paying_Amount_c;

        }

    }

    public static void handleBeforeUpdate(Map<Id, Billing_c> oldBillingsMap, List<Billing_c> updatedBillings) {

        for (Billing_c billing : updatedBillings) {

            Billing_c oldBilling = oldBillingsMap.get(billing.Id);

            Decimal oldPaidAmount = oldBilling.Paid_Amount_c;

            billing.Paid_Amount_c = oldPaidAmount + billing.Paying_Amount_c;

        }

    }

}
```

Create the trigger

CODE:

```
trigger UpdatePaidAmountTrigger on Billing_c (before insert,  
before update) {
```

```
    if (Trigger.isInsert) {
```

```
        UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger  
.new);
```

```
    } else if (Trigger.isUpdate) {
```

```
        UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigg  
er.oldMap, Trigger.new);
```

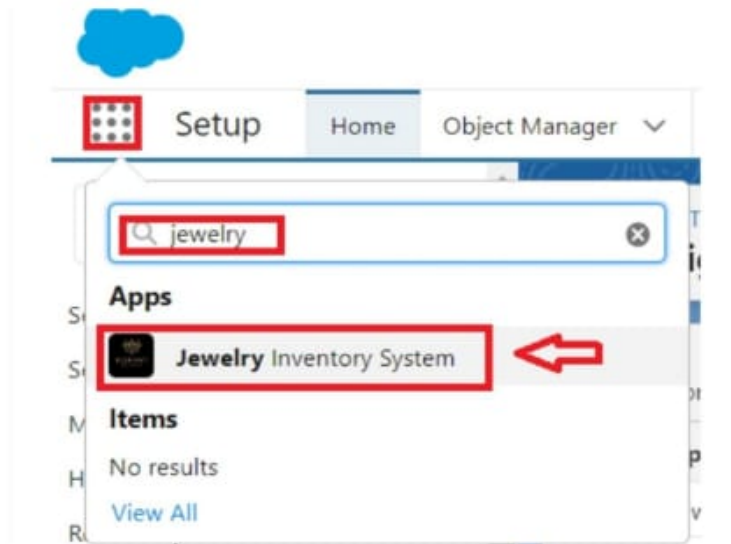
```
    }
```

```
}
```

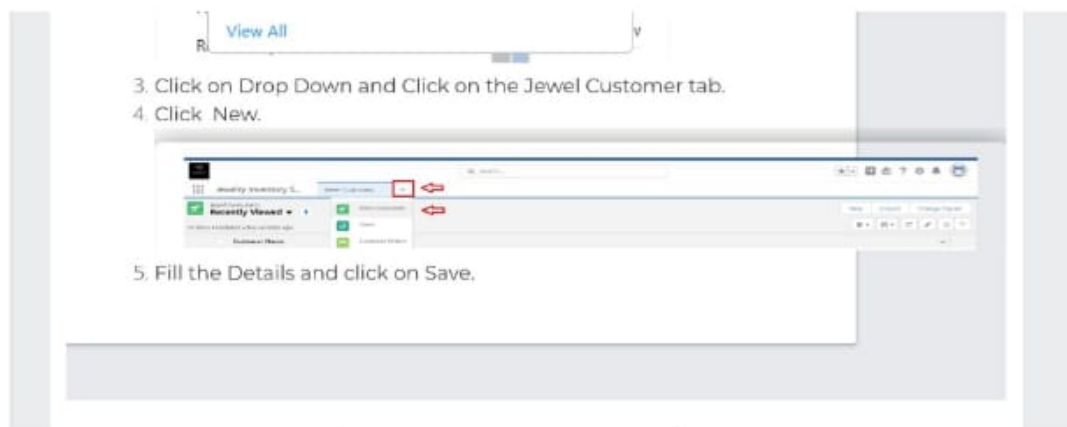

User Adoption

Create a Record (Jewel Customer)

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



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

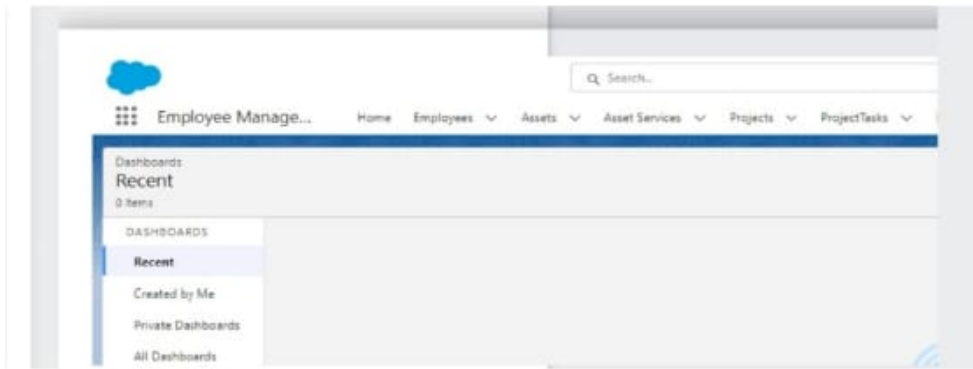


5. Fill the Details and click on Save.

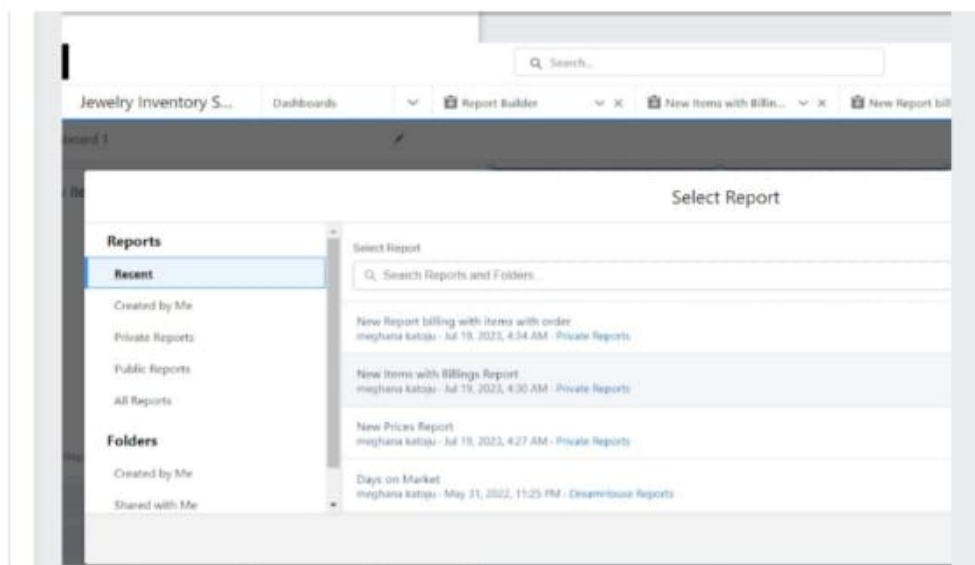
DASHBOARDS

CREATE DASHBOA

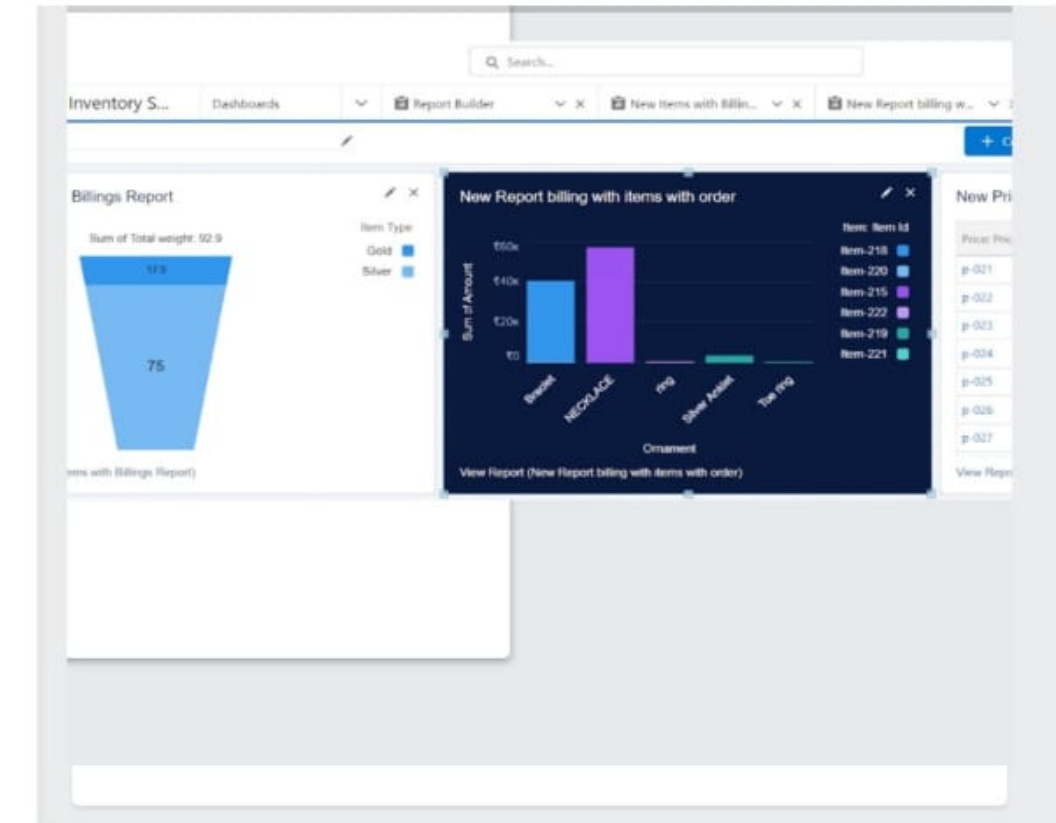
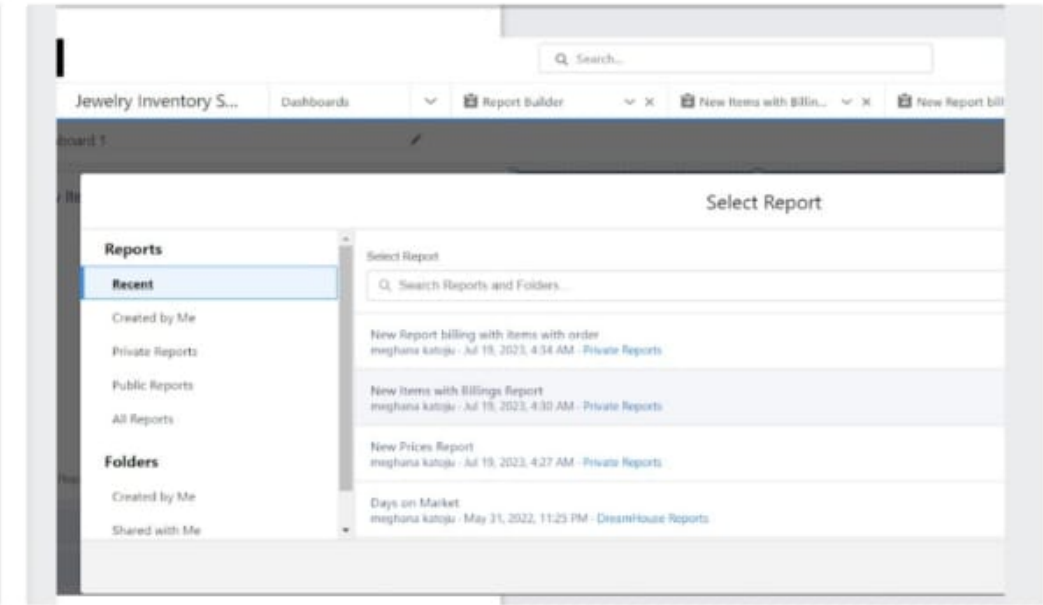
- Go to the app >> click on the Dashboards tabs.



Give a Name and click on Create.

A screenshot of a 'New Dashboard' form. The title 'New Dashboard' is at the top right. Below it, there are three input fields: 'Name' (with a red asterisk indicating it's required), 'Description', and 'Folder'. The 'Name' field contains the text 'Dashboard 1'. The 'Folder' field contains the text 'Private Dashboards'. There is a blue 'Create' button on the right side of the form.

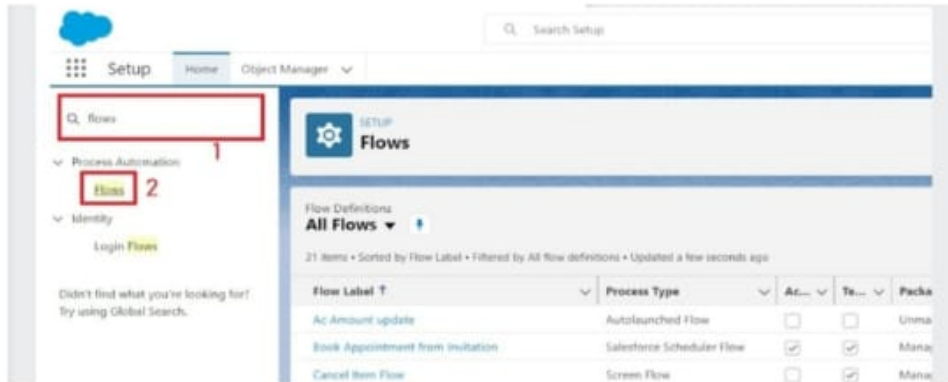
ACTIVITY 2: CREATE ANOTHER DASHBOARD AS WE DISCUSSED IN ACTIVITY 1.



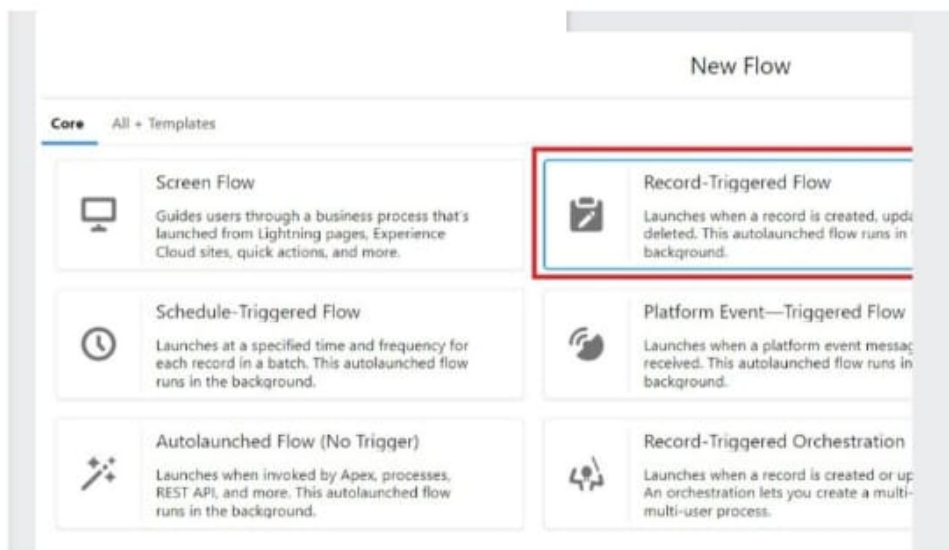
FLOWS

Create a Flow

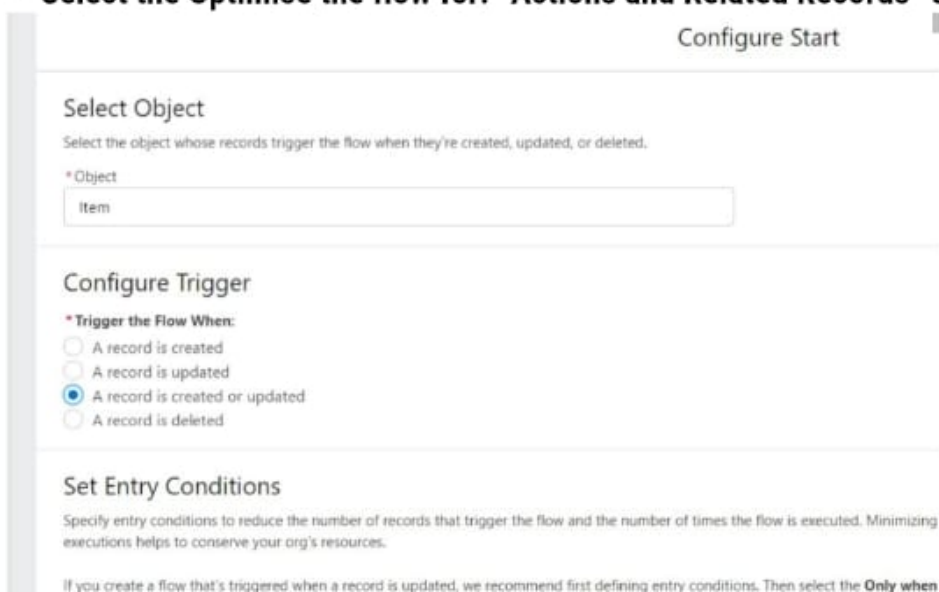
- Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.



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



- Select the Object as a "Billing" in the Drop down list.
- Select the Trigger Flow when: "A record is Created or Updated".
- Select the Optimise the flow for: "Actions and Related Records" and Click on Done



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

Configure Start

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

* Object
Billing

Configure Trigger
* Trigger the Flow When:

☐ A record is created
☒ A record is updated
☐ A record is created or updated
☐ A record is deleted

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

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

New Resource

* Resource Type
Select...

Variable
Store a value that can be used and changed throughout the flow.

Constant
Store a value that can be used but not changed throughout the flow.

Formula
Calculate a value when the formula is used in the flow.

Text Template
Store text that can be used and changed throughout the flow.

Stage
Identify different phases in the flow to track user progress.

Edit Text Template

* API Name
EmailBody

Description

* Body ⓘ
Insert a resource...

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

- Change the view as Rich Text ? View to Plain Text.
- In the body field paste the syntax that is given below.
- Now click on elements, and drag the action element into the preview pane.
- Give the label name as "notice"
- Enable the body in set input values for the selected action
- Select the text template that was created.

Save the flow

*Flow Label

*Flow API Name

Description

[Show Advanced](#)

Flow Builder Email - V8

Free-Form Version 8: Inactive—Last modified

Toolbox

Elements Manager

- Interaction (2)
 - Action
 - Subflow
- Logic (8)
 - Assignment
 - Decision
 - Loop
 - Collection Sort
 - Collection Filter
- Data (4)
 - Create Records
 - Update Records
 - Get Records
 - Delete Records

Get more on the AppExchange

Start

Record-triggered IT

Object: **Billing**

Trigger: **A record is created or**

Optimize for: **Actions and Data**

+ Add Scheduled Paths (Opti

Open Flow Trigger Explorer

Run immediately

Action Email