CRM Application for Jewel Management - (Developer)

College Name:KPR COLLEGE OF ARTS SCIENCE AND RESEARCH

College Code : bruaz

TEAMID : NM2025TMID21382

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Title : CRM Application for JewelManagement-(Developer)

ProjectOverview:

TheJewelInventorySystemisacomprehensivesoftwareSolutiondesigned tostreamlineandmanagetheinventoryandsalesprocessesofajewellerystore or ajewellerymanufacturer.Thesystemaimstoprovideanefficientanduser-friendly solution to track and control the inventory of various jewellery items, maintain accurateerecords,andfacilitateseamlesssalestransactions.

Objectives:

- **Efficient Inventory Management** – Accurately track jewellery itemsbytype,weight,purity,andpricing.
- **Real-Time Stock Monitoring**– Update inventory levels instantly to prevent stockouts or overstocking.
- **Sales and Billing Automation** – Automate invoicing, discounts, and payment tracking forfaster transactions.
- **SecureRecordKeeping**– Maintainaprotecteddatabaseofall inventoryandsalesactivities.
- **User-Friendly Interface** –Ensure easynavigation forusers with varyingtechnicalskills.
- **Reporting and Analytics** – Provide actionable insights through sales and inventory reports.
- **Role-BasedAccess Control** –Restrictsystemaccess basedon user roles to enhance security.

StudentOutcomes:

- PracticalInventoryManagementSkills– Studentslearntobuild systemsthattrackjewellerystockbykeyattributeslikeweightand purity.
- UnderstandingofRetailBusinessProcesses– Studentsgain insightintohowinventoryandsalesworkflowsoperatein a jewellery business.
- ApplicationDevelopmentLifecycle Experience – Students experiencethefullprojectcyclefromplanningtodeployme nt.
- DatabaseDesignandRecord-KeepingProficiency– Students developskillsindesigningsecureandstructureddatastora ge solutions.
- UserInterfaceandExperienceDesign– Studentslearntocreate intuitiveinterfacessuitedforreal-worldendusers.
- TeamworkandProjectCollaboration– Studentsenhance collaborationskillsbyworkingindevelopmentteams.
- ExposuretoIndustryToolsandConcepts – Studentsbecome familiarwithfeatureslikereporting,role-basedaccess,and optional barcode integration.

SystemRequirements:

HardwareRequirements:

- Computerwithmin/sum4GBRAM,Dual-coreprocessor
- Stableinternetconnection

SoftwareRequirements:

- SalesforceDeveloperEditionOrg
- ModernWebBrowser(e.g.,GoogleChrome,Firefox)

CreatingDeveloperAccount

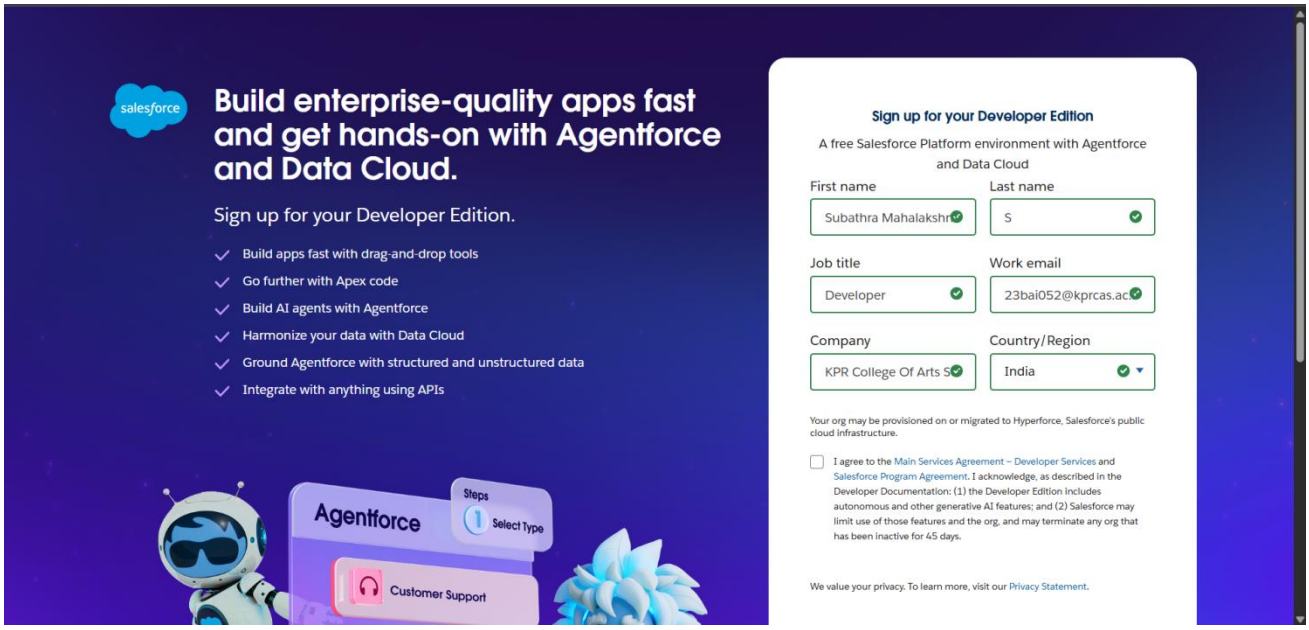
Creatingadeveloperorginsalesforce.

1. Gotohttps://developer.salesforce.com/signup
2. Onthesignupform,enterthefollowingdetails:
   3. Firstname&Lastname
   4. Email
   5. Role:Developer
   6. Company:CollegeName
   7. County:India
   8. PostalCode:pincode
   9. Username:shouldbeacombinationofyournameandcompan

y

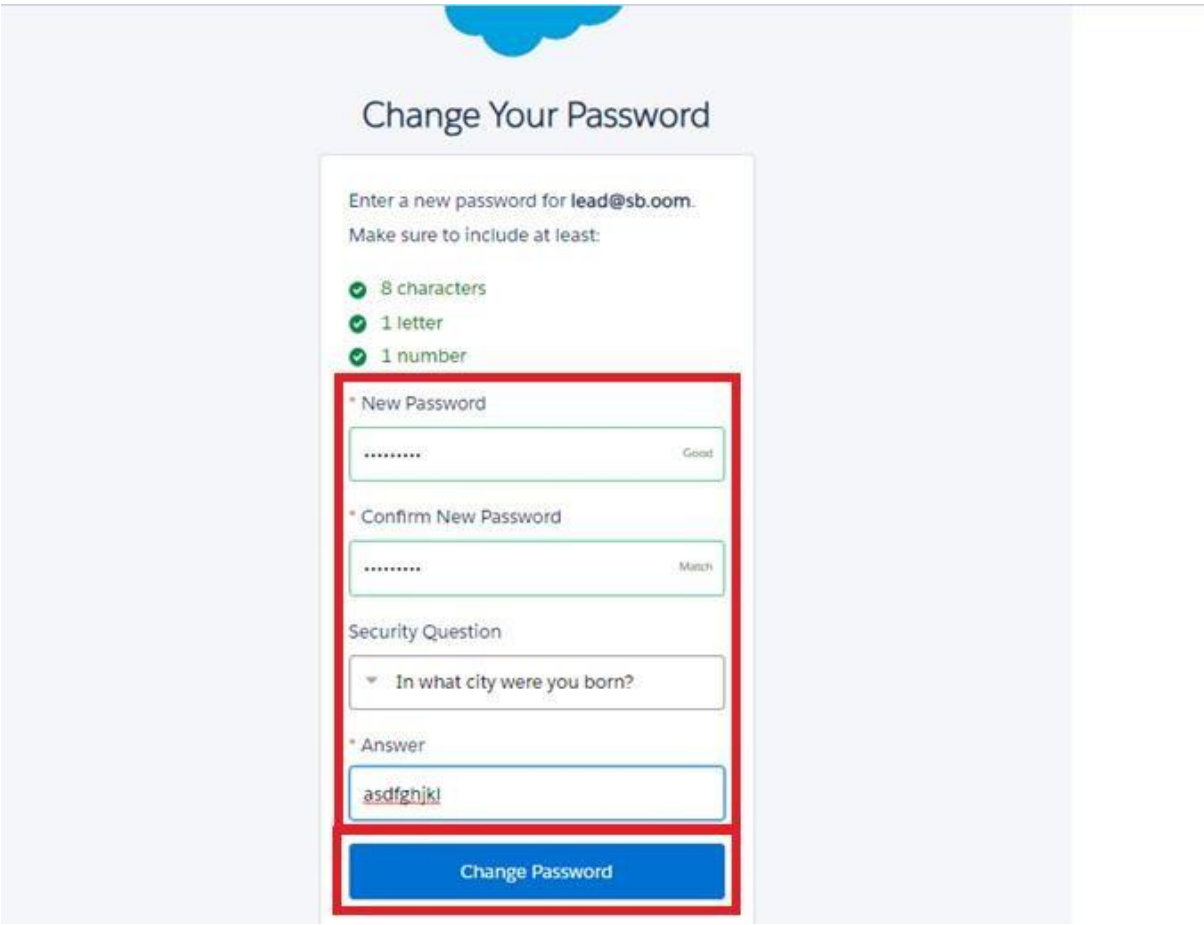
Thisneednotbeanactualemailid,youcangiveanythingintheformat :username@organization.com

Clickonsignmeupafterfillingthese.

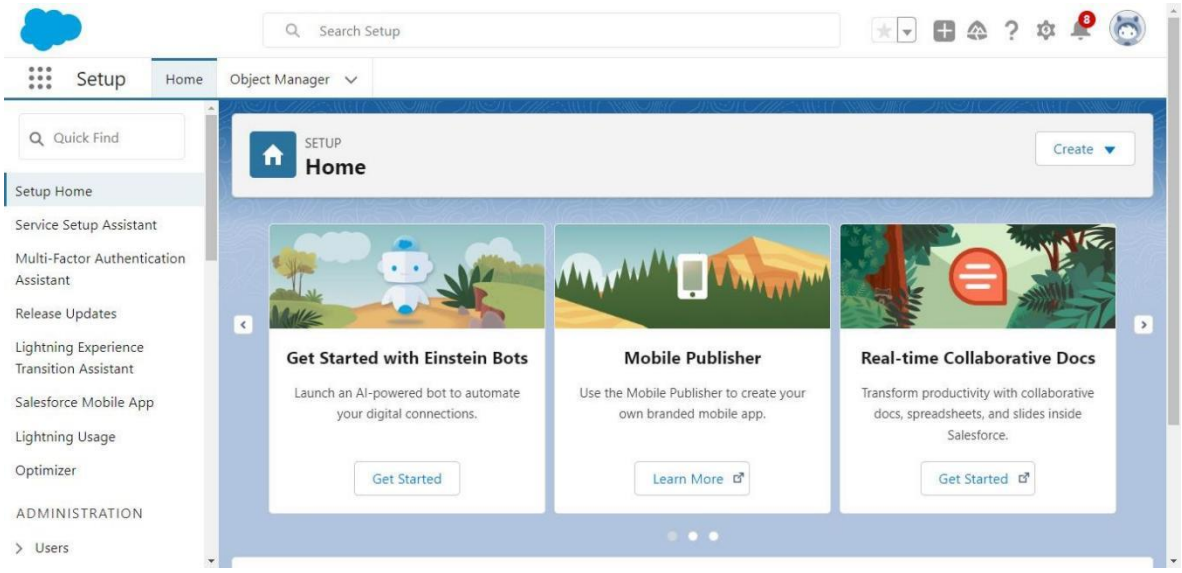


Account Activation

1. Gototheinboxoftheemailthatyouusedwhilesigningup.Clickonthe ResetPasswordtoactivateyouraccount.Theemailmaytake5-10mins.
2. ClickonResetPassword
3. Giveapasswordandanswerasecurityquestionandclickonchan ge password.



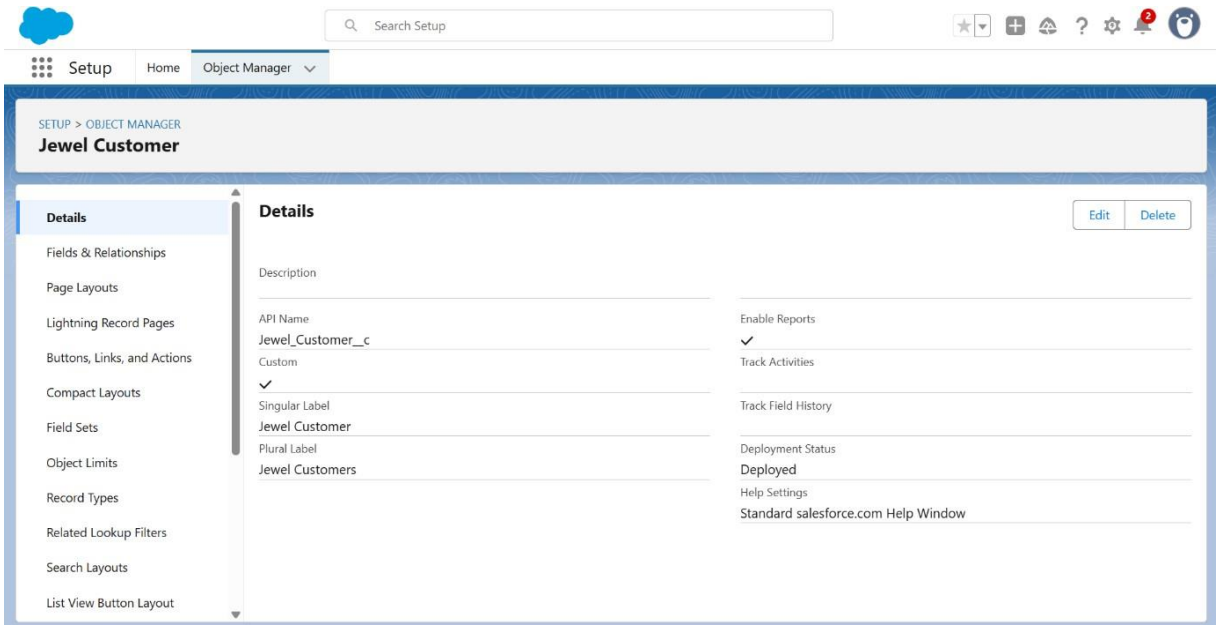
4. Thenyouwillredirecttoyoursalesforcesetuppage.



CreateJewelCustomerObject

ThepurposeofcreatingaJewelCustomercustomobjectistostoreandmanage information about Customer.
Tocreateanobject:

1. Fromthesetuppage>>ClickonObjectManager>>ClickonCreate> > Click on Custom Object.
2. Enterthelabelname:JewelCustomer
3. Plurallabelname:JewelCustomers
4. EnterRecordNameLabelandFormat
    - RecordName>>Customername
    - DataType>>Text
2. ClickonAllowreports.
3. AllowsearchandclickSave.



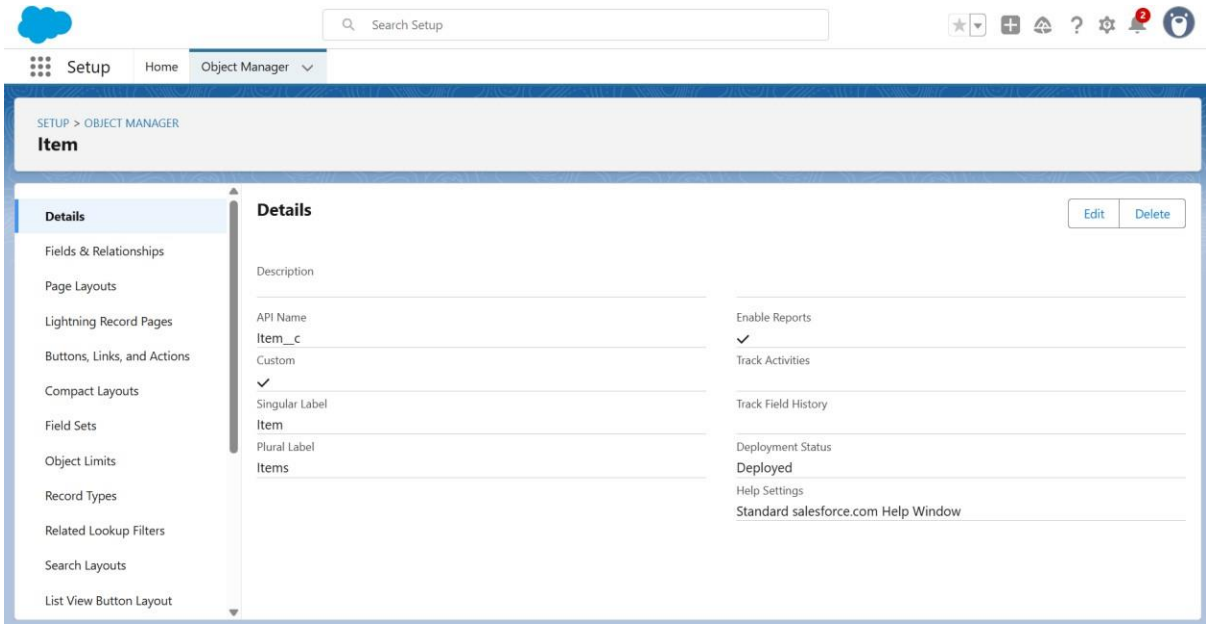
CreateItemObject

ThepurposeofcreatingaItemobjectistomanagetheinventoryofgoldand silver items.
Tocreateanobject:

1. From the setup page >>ClickonObjectManager>>Clickon Create>>Click on Custom Object.
    1. Enterthelabelname>>Item
    2. Plurallabelname>>Items
    3. EnterRecordNameLabelandFormat
        - RecordName>>ItemId
        - DataType>>AutoNumber
        - DisplayFormat>>Item-{00}

- StartingNumber>>1

2. ClickonAllowreports.
3. Allowsearch>>Save.

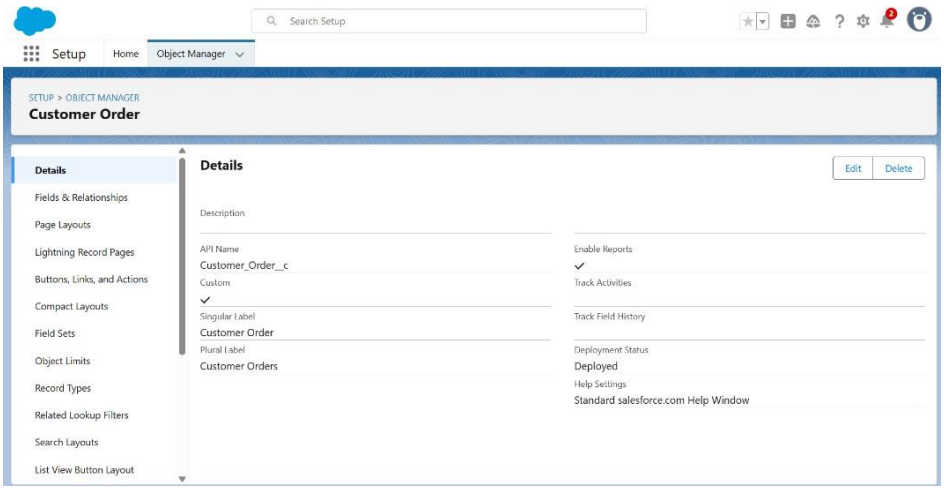


CreateCustomerOrderObject

ThepurposeofcreatingaItemobjectistomanagetheinventoryofgoldand silver items.

Tocreateanobject:

1. From the setup page >>ClickonObjectManager>>Clickon Create>>Click on Custom Object.
    1. Enterthelabelname>>CustomerOrder
    2. Plurallabelname>>CustomerOrders
    3. EnterRecordNameLabelandFormat
        - RecordName>>CustomerOrderId
        - DataType>>AutoNumber
        - DisplayFormat>>Item-{00}
        - StartingNumber>>1
2. ClickonAllowreports.
3. Allowsearch>>Save.

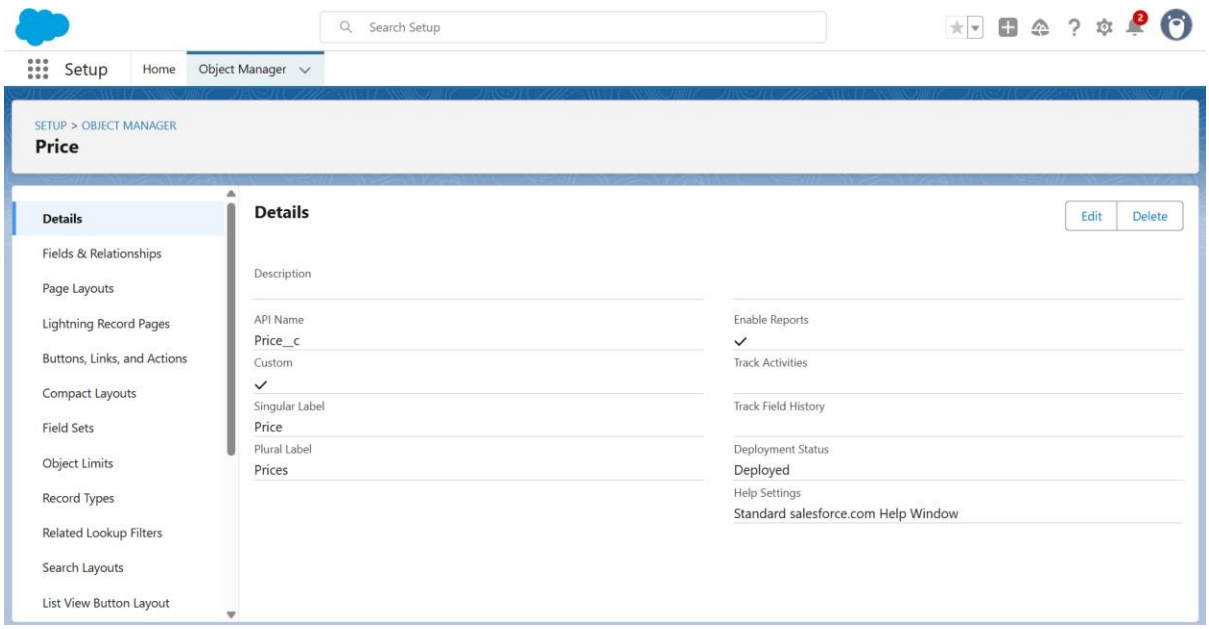


CreatePriceObject

ThepurposeofcreatingaItemobjectistomanagetheinventoryofgoldand silver items.

Tocreateanobject:

1. From the setup page >>ClickonObjectManager>>Clickon Create>>Click on Custom Object.
2. Enterthelabelname>>Price
3. Plurallabelname>>Prices
4. EnterRecordNameLabeland Format
    - RecordName>>PriceId
    - DataType>>AutoNumber
    - DisplayFormat>>Item-{00}
    - StartingNumber>>1
5. ClickonAllowreports.
6. Allowsearch>>Save.

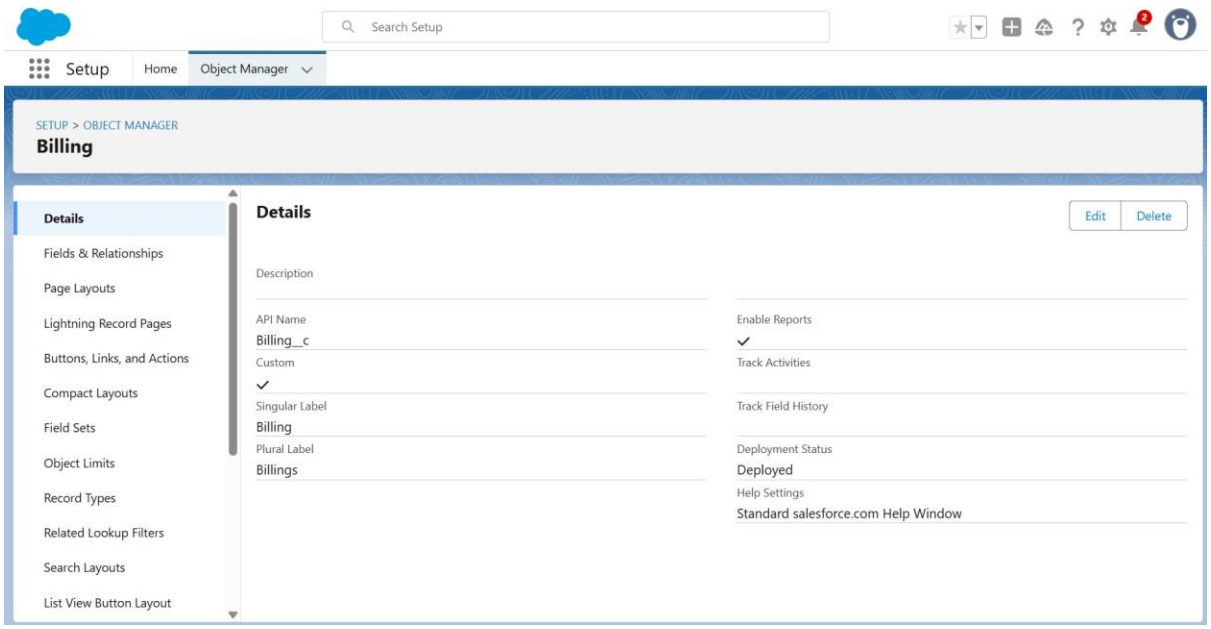


CreateBillingObject

ThepurposeofcreatingaItemobjectistomanagetheinventoryofgoldand silver items.

Tocreateanobject:

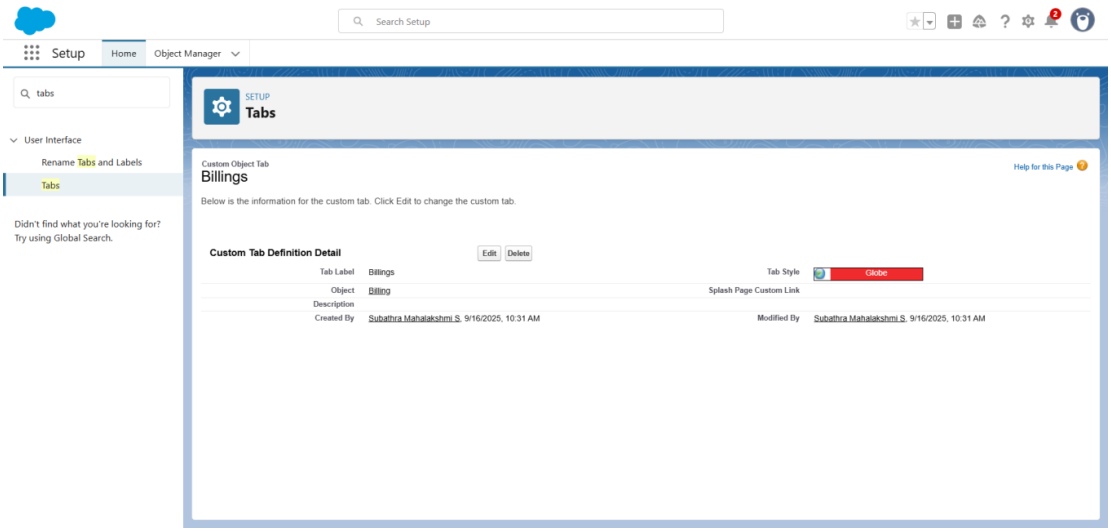
1. From the setup page >>ClickonObjectManager>>Clickon Create>>Click on Custom Object.
2. Enterthelabelname>>Billing
3. Plurallabelname>>Billings
4. EnterRecordNameLabeland Format
    - RecordName>>BillingId
    - DataType>>AutoNumber
    - DisplayFormat>>Item-{00}
    - StartingNumber>>1
5. ClickonAllowreports.
6. Allowsearch>>Save.



CreatingaCustomTab

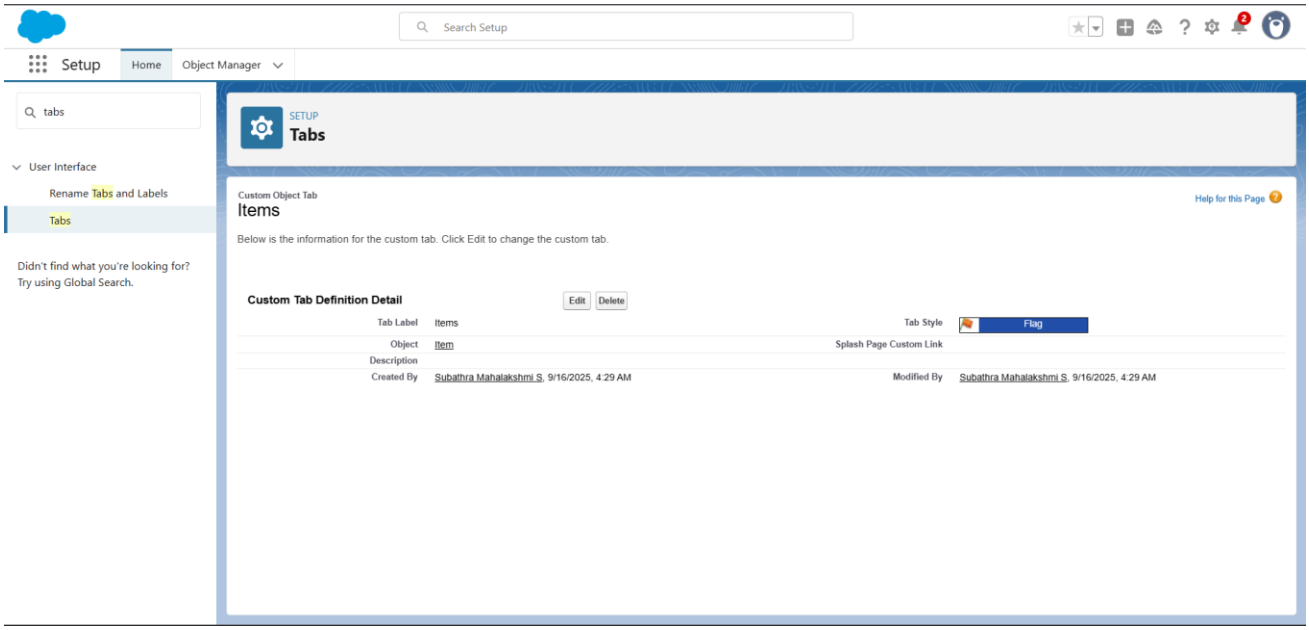
Tocreate aTab:(Customer)

1. Gotosetuppage>>typeTabsinQuickFindbar>>clickontabs>> New (under custom object tab)
2. SelectObject(JewelCustomer)>>Selectanytabstyle>>Next(Ad d toprofilespage)keepitasdefault>>Next(AddtoCustomApp) keep it as default >> Save.



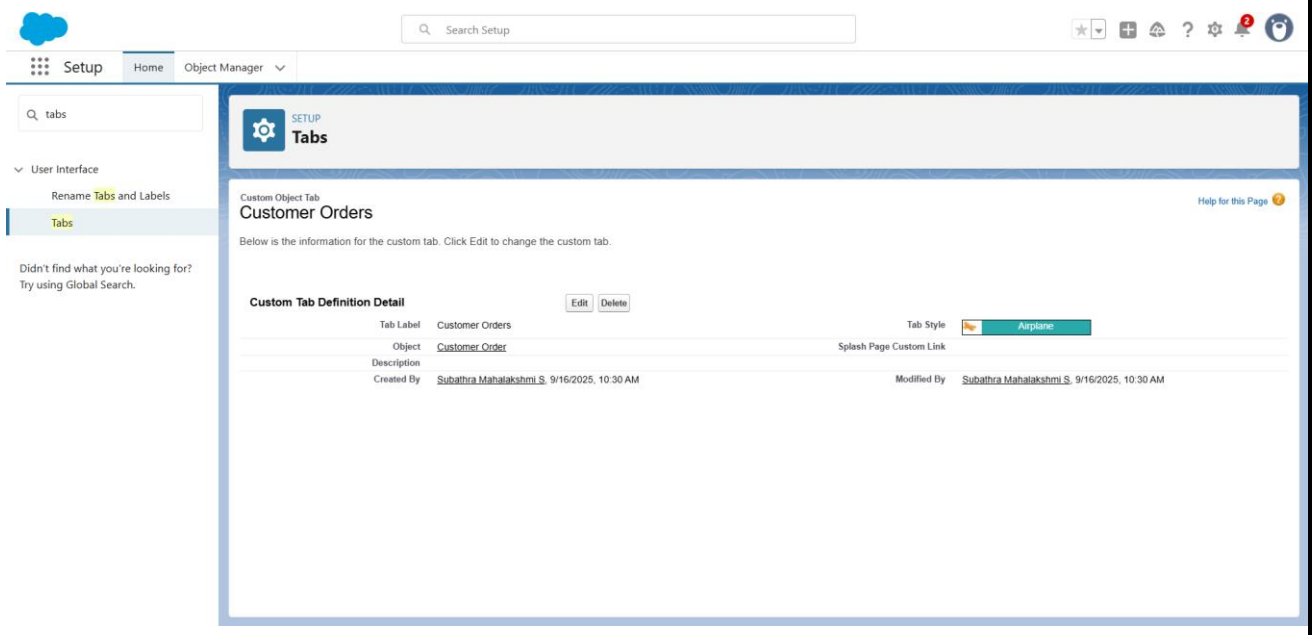
TocreateaTab:(Item)

1. Gotosetuppage>>typeTabsinQuickFindbar>>clickontabs>>New (under custom object tab)
2. SelectObject(Item)>>Selectthetabstyle>>Next(Addtoprofilespage) keepitasdefault>>Next(AddtoCustomApp)keepitasdefault>>Save.



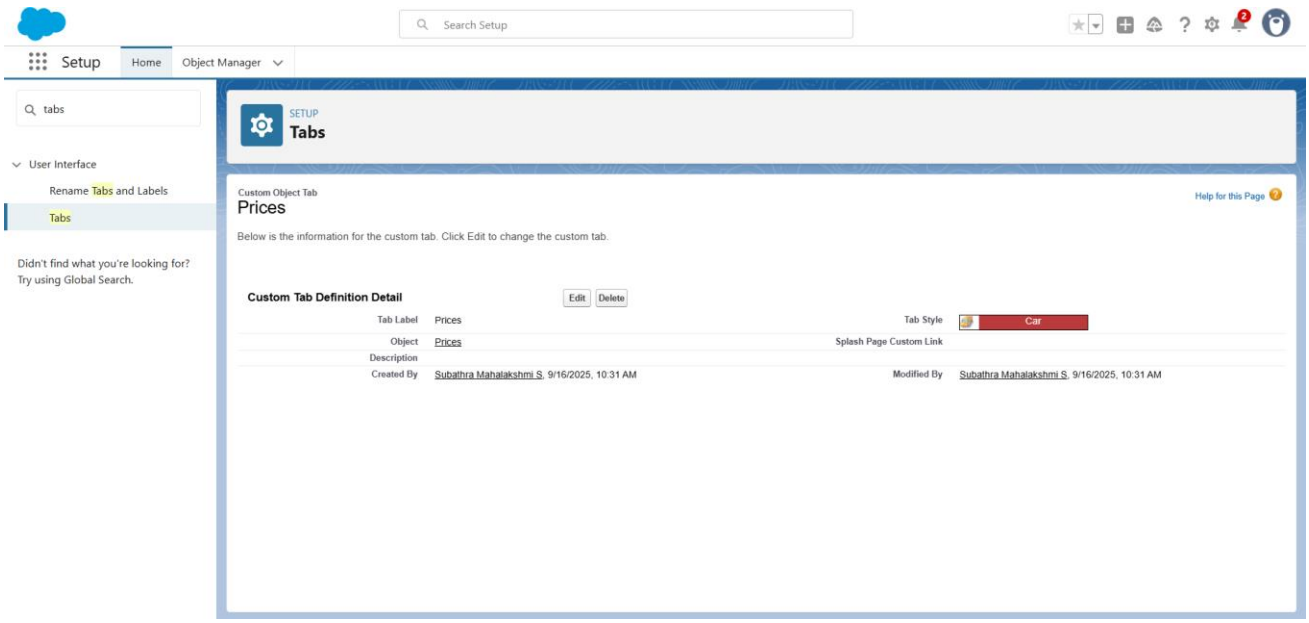
TocreateaTab:(CustomerOrder)

1. Gotosetuppage>>typeTabsinQuickFindbar>>clickontabs>>New (under custom object tab)
2. SelectObject(CustomerOrder)>>Selectthetabstyle>>Next(Addto profilespage)keepitasdefault>>Next(AddtoCustomApp)keepitas default >> Save.



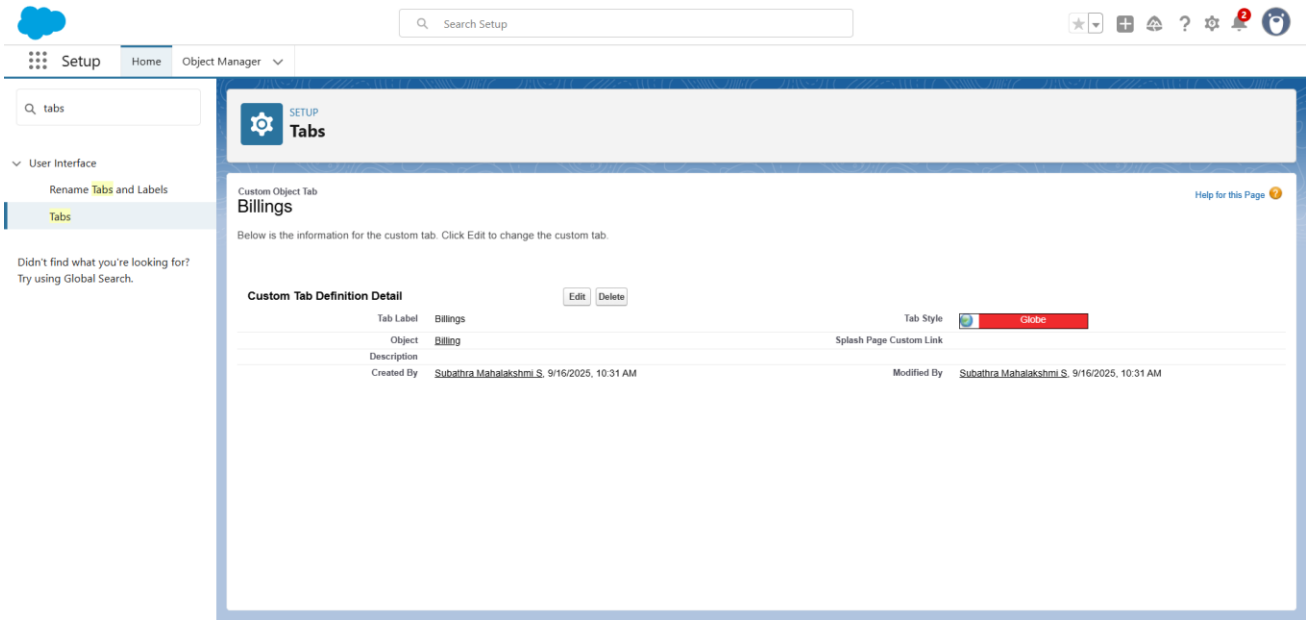
To create aTab:(Price)

1. Gotosetuppage>>typeTabsinQuickFindbar>>clickontabs>>New (under custom object tab)
2. SelectObject(Price)>>Selectthetabstyle>>Next(Addtoprofilespage)
   keepitasdefault>>Next(AddtoCustomApp)keepitasdefault>>Save.



To create aTab:(Billing)

1. Gotosetuppage>>typeTabsinQuickFindbar>>clickontabs>>New (under custom object tab)
2. SelectObject(Billing)>>Selectthetabstyle>>Next(Addtoprofiles page)keepitasdefault>>Next(AddtoCustomApp)keepitasdefault >>Save.



CreateaLightningApp

Tocreatealightningapppage:

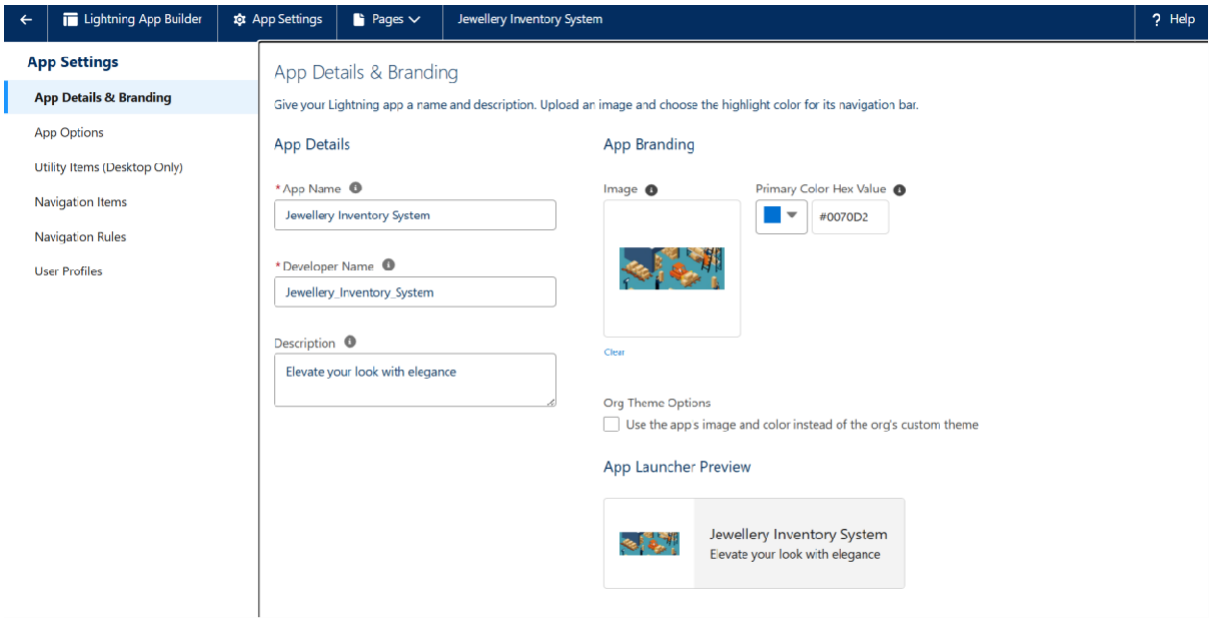
1. Gotosetuppage>>search“appmanager”inquickfind>>select“ap p manager” >>

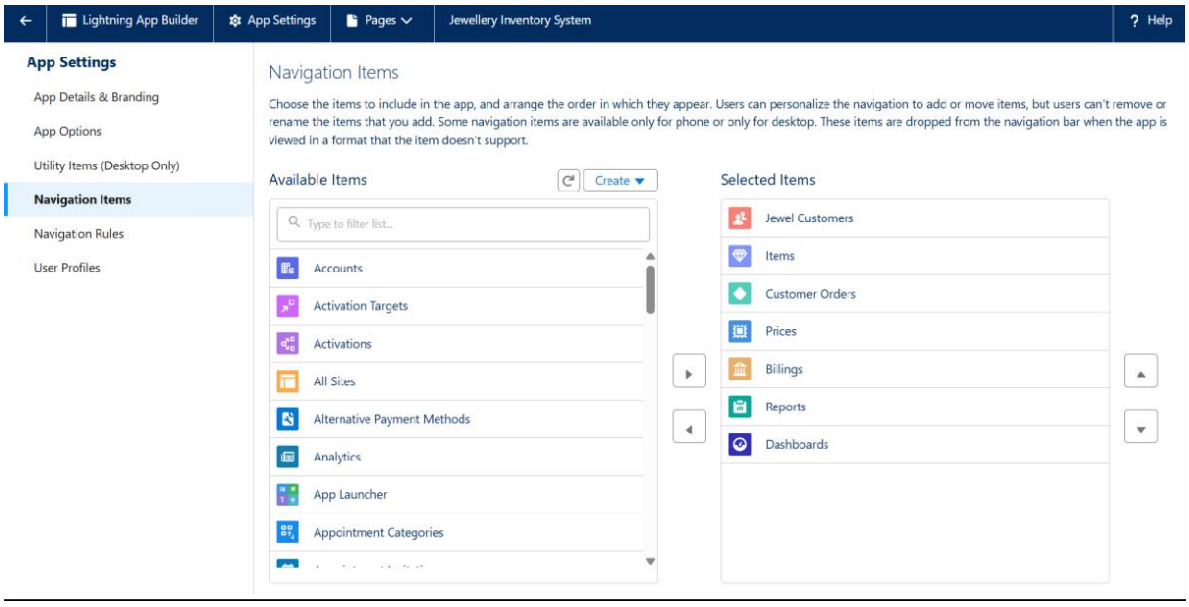
2. click on NewlightningApp.

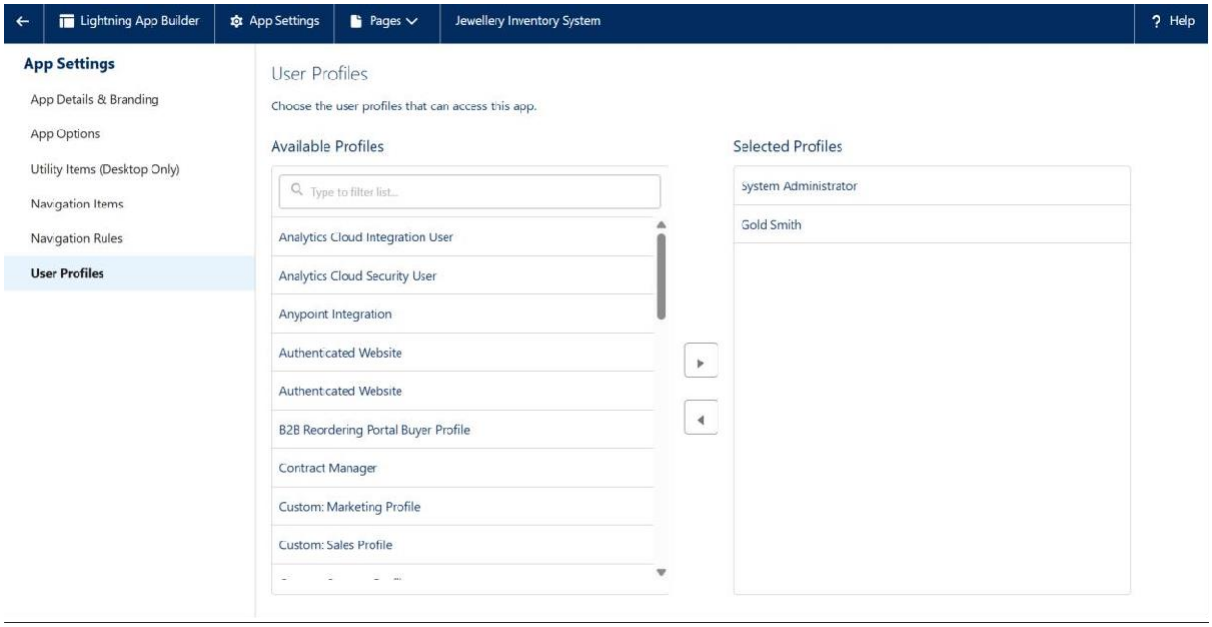
3. Filltheappnameinappdetailsandbrandingasfollo w AppName :Jewellery Inventory System.
   Developer Name : This will auto populated
   Description:Elevateyourlookwithelegance
   Image:optional(ifyouwanttogiveanyimageyoucanotherwisenot mandatory)
   Primarycolourhexvalue:keepthisdefault.
4. ThenclickNext>>(Appoptionpage)SetNavigationStyleasConsole Navigation >> Next.

5. (UtilityItems)keepitasdefault>>Next.
6. ToAddNavigationItems
7. 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.
8. ToAddUserProfiles:

9. Searchprofiles(Systemadministrator)inthesearchbar>>clickont he arrow button>> save&finish.







CreatingLookupRelationship

ToCreatearelationshipbetweenJewelCustomer&CustomerOrderObjects.

1. Gotothesetuppage>>clickonobjectmanager>>typeobject name(CustomerOrder)inthequickfindbar>>clickontheobjec t.
2. Clickonfields&relationship>>clickonNew.
3. Select“Lookuprelationship”asdatatypeandclickNext.
4. Selecttherelatedobject“JewelCustomer”.
5. GiveFieldLabelas“Customer”andclickNext.
6. Next>>Next>>Save.

CreatingaMaster-DetailRelationship

ToCreateaMaster-Detailrelationship:

1. Gotothesetuppage>>clickonobjectmanager>>typeobject name(CustomerOrder)inthequickfindbar>>clickontheobjec t.
2. Clickonfields&relationships>>clickonNew.
3. Select“Master-Detailrelationship”as datatypeandclickNext.
4. Selecttherelatedobject“Item”.
5. GiveFieldLabelas“Item”andclickNext.
6. Next>>Next>>Save.

CreatingTextFieldinJewelCustomerObject

Tocreatefieldsinanobject:
1. Gotosetup>>clickonObjectManager>>typeobjectname(JewelCustome r) in quick find bar >> click on the object.
2. Nowclickon“Fields&Relationships”>>New
3. SelectDatatypeas“Text”.
4. ClickonNext
5. Filltheaboveasfollowing:
   - FieldLabel:City
   - Length:20
   - FieldName:getsautogenerated
   - ClickonNext>>Next>>Saveandnew.

CreatingthePhonefieldinobjectJewelCustomer

Tocreatefieldsinanobject:
1. Gotosetup>>clickonObjectManager>>typeobjectname(Jewe l Customer) in quick findbar >> click on the object.
2. Nowclickon“Fields&Relationships”>>New
3. SelectDatatypeas“Phone”andclickNext.
4. GiventheFieldLabelas“Phone”.
5. FieldNamewillbeautopopulated,andclickonNext>>Next>>Save& new.

CreatingtheEmailfieldinobjectJewelCustomer

Tocreatefieldsinanobject:
1. Gotosetup>>clickonObjectManager>>typeobjectname(Jewe l Customer) in quick findbar >> click on the object.
2. Nowclickon“Fields&Relationships”>>New
3. SelectDatatypeas“Email”andclickNext.
4. GiventheFieldLabelas“Email”.
5. FieldNamewillbeautopopulated,andclickonNext>>Next>>Save.

Creatingthenumberfieldin Itemobject

Tocreatefieldsinanobject:
1. Gotosetup>>clickonObjectManager>>typeobjectname(Item)inquic k find bar? click on the object.
2. Nowclickon“Fields&Relationships”>>New
3. SelectDatatypeas“Number”andclickNext.
4. GiventheFieldLabelas“Purity”andlengthas“2”.
5. FieldNamewillbeautopopulated,andclickonNext>>Next>>Save.

CreatingPicklistFieldinItemObject

Tocreatefieldsinanobject:

1. Gotosetup>>clickonObjectManager>>typeobjectname(Item)inquic k find bar>> click on the object.
2. Nowclickon“Fields&Relationships”>>New.
3. SelectDatatypeas“Picklist”andclickNext.
4. EnterFieldLabelas“ItemType”.
5. Invaluesselect“Entervalues(Gold,Silver),witheachvalueseparatedb ya newline"andentervaluesasshownbelow.
6. ClickNext?Next?Next?Save.

CreatingCurrencyFieldinPriceObject

Tocreatefieldsinanobject:

1. Gotosetup>>clickonObjectManager>>typeobjectname(Price)inquic k find bar >> click on the object.
2. Nowclickon“Fields&Relationships”>>New.
3. SelectDatatypeas“Currency”andclickNext.
4. EnterFieldLabelas“GoldPrice”andlengthas“8”anddecimal0.Field name will be auto generated.
5. ClickNext>>Next>>Next>>Save .

Creating Formula Field(Cross Object) in Item

Object To create fields in an object:

(Note:CreateaLookupRelationshipinItemObjecttoPriceObjectwithField Name:Prices)

1. Gotosetup>>clickonObjectManager>>typeobjectname(Item)inquic k find bar? click on the object.
2. Nowclickon“Fields&Relationships”>>New.
3. SelectDatatypeas“Formula”andclickNext.
4. GiveFieldLabelandFieldNameas“GoldPrice”andselectformulareturn type as “Currency” and click next.
5. UnderAdvancedFormulawritedowntheformula :Prices_r.Gold_price_c/ 10.
6. click“CheckSyntax”andNext>> Next>>Save&New.

CreatingRemainingFieldsinObjects

Nowcreatetheremainingfieldsusingthedatatypesmentioned.

<table>
<tr><th>s.no</th><th>Objectname</th><th>Fields</th></tr>
<tr><td>1</td><td>JewelCustomer</td><td>
<table>
<tr><th>Field Name</th><th></th></tr>
<tr><td></td><td>Datatyp</td></tr>
<tr><td>e 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/Postalcode</td><td>Text(6)</td></tr>
</table>
</td></tr>
<tr><td>2</td><td>Price</td><td>
<table>
<tr><td>Silver Price</td><td>Currency (Length=8,Decimal=5)</td></tr>
</table>
</td></tr>
<tr><td>3</td><td>Item</td><td>
<table>
<tr><td>FieldLabel:CustomerName</td><td>LookupRelationshipwithJewelCustomer Object</td></tr>
<tr><td>Ornament</td><td>Text(20)</td></tr>
<tr><td>Weight</td><td>Number (Length=8,Decimal=5)</td></tr>
</table>
</td></tr>
</table>

Stone Weight	Number (Length=5,Decimal=5)
Percentage	Number (Length=2,Decimal=0)
Stone/OtherPrice	Currency (Length=8,Decimal=2)
ExpectedDaysOfReturn	Picklist 1-3Days 4-5Days 6-7Days 8-10Days
Priority	Picklist Low Medium High Critical
SilverPrice	Formula (ReturnType:Number) (Decimal=3) (Prices__r.Silver_price__c /1000)

PurityGoldPrice	Formula (ReturnType:Currency) (Decimal=2) ((Prices_r.Gold_price__c *Purity__c)/24)/ 10
TotalWeight	Formula (ReturnType:Number) (Decimal=3) (Weight_c-Stone_weight c)
Amount	Formula (ReturnType:Currency) (Decimal=3) IF(ISPICKVAL(Item_Typec,"G ol Total_weightc*Purity_Gold_pc,ri Total_weightc*Silver_price c _
KDM	Formula (ReturnType:Currency) (Decimal=0) (Amount_c *Perc entage_c) / 100
MakingCharges	Formula

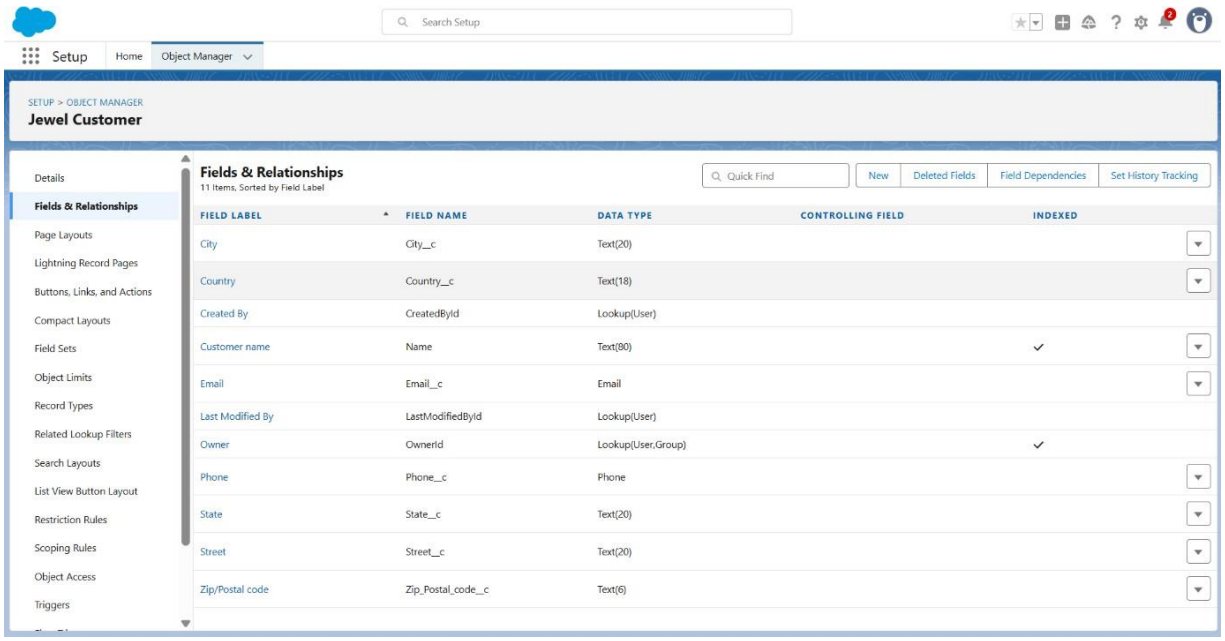
			(ReturnType:Currency) (Decimal=0) IF(ISPICKVAL(Item_Type__c ,"Gold"),Weight___c *300 ,Weight___c*10)

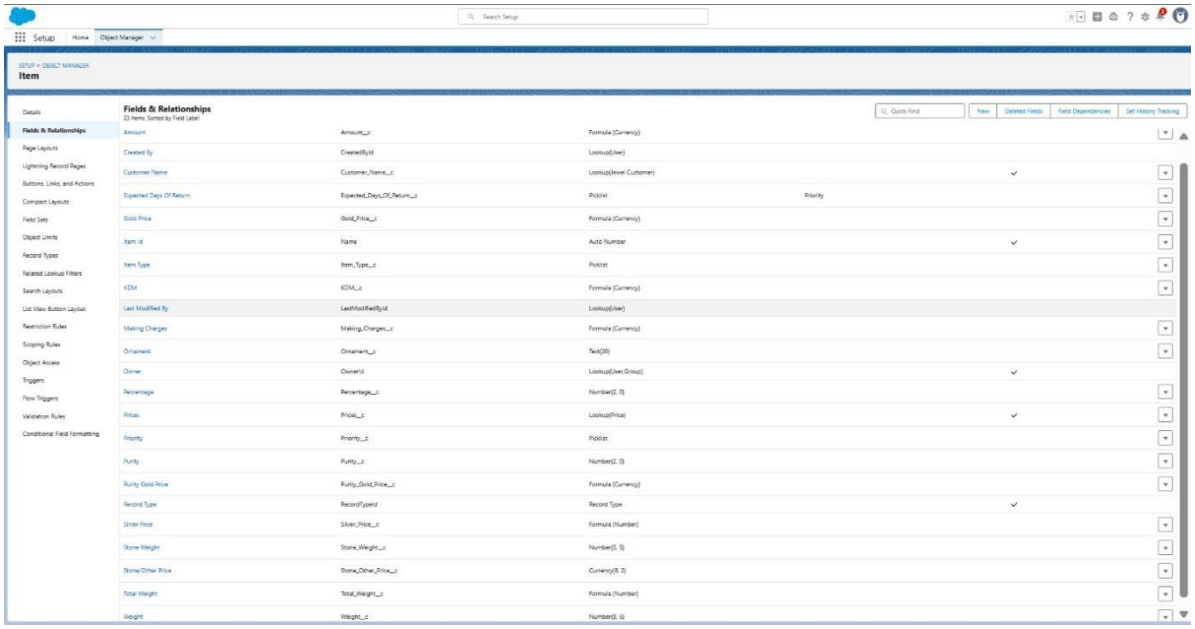
4	Customer Order	OrderStatus	Picklist Started NotStarted On Hold Completed NotCompleted

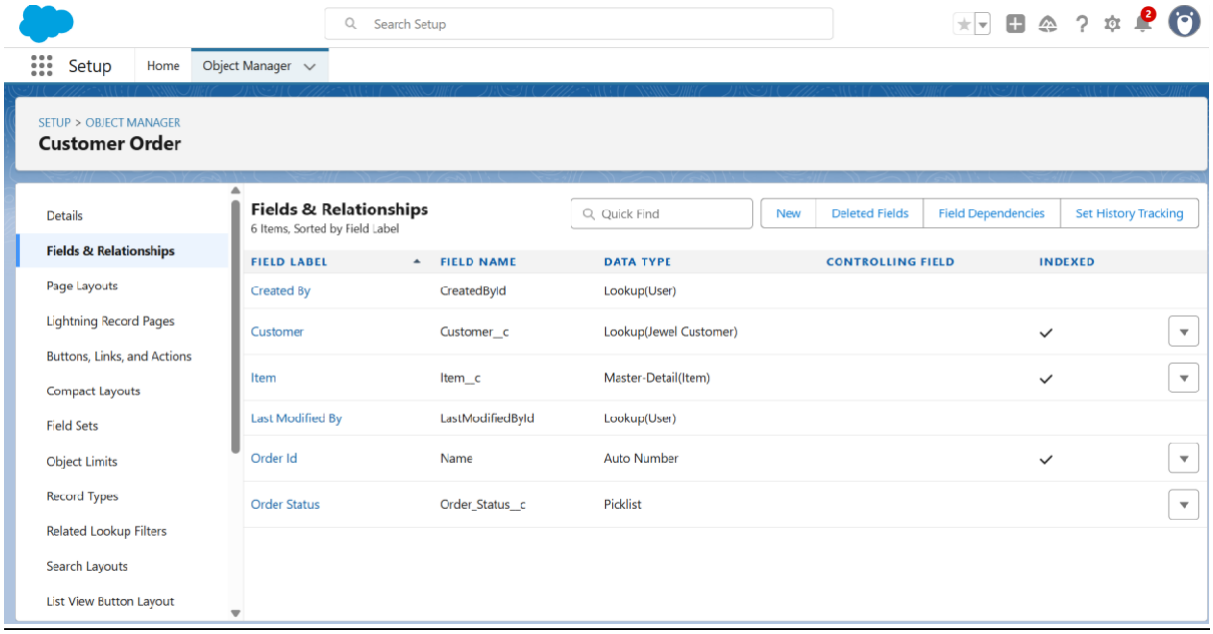
5	Billing		
		FieldLabel:Item	LookupRelationship with Item Object
		Ornament	Formula (ReturnType:Text) Item__r.Ornament_c

Stoneweight	Formula (ReturnType:Number) (Decimal=2) Item__r.Stone_weight__c
Weight	Formula ReturnType:Number(Decimal =2) Item__r.Total_weight__c
Amount	Formula (ReturnType:Currency) (Decimal=2) Item__r.Amount__c
Gold/SilverPrice	Formula (ReturnType:Currency) (Decimal=2) IF(ISPICKVAL(Item___r.Item_Type__c,"Gold"),Item___r.Gold_price__c , Item__r.Silver_price__c)
KDMCharge	Formula (ReturnType:Currency)

	(Decimal=0) Item__r.KDM__c
MakingCharges	Formula (ReturnType:Currency) (Decimal=2) Item__r.Making_Charges__c
Stones/otherprice	Formula (ReturnType:Currency) (Decimal=2) Item__r.Stone_other_pricec
TotalAmount	Formula (ReturnType:Currency) (Decimal=0) Amount__c + KDM_Charge_c+Stones_other_price__c+Making_Charges__c


Search Setup
Setup
Home
Object Manager
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
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Fields & Relationships
11 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
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)
Zip/Postal code
Zip_Postal_code__c
Text(6)


Setup
SETUP > OBJECT MANAGER
Item
Fields & Relationships


Search Setup
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Object Manager
SETUP > OBJECT MANAGER
Customer Order
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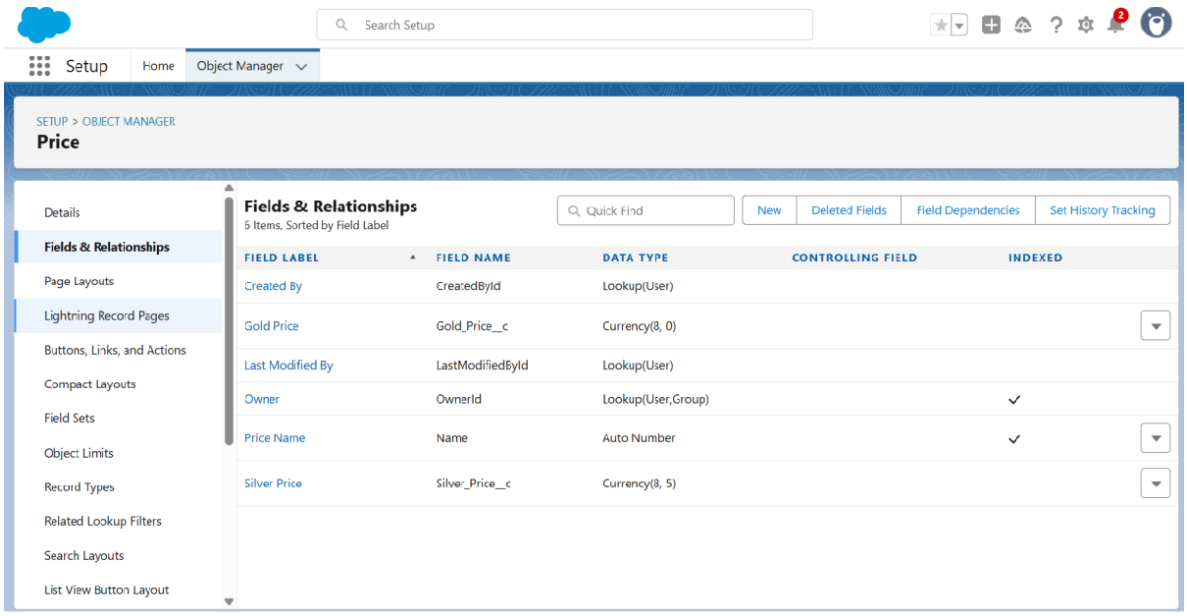
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Fields & Relationships
6 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
Customer
Customer__c
Lookup(Jewel Customer)
Item
Item__c
Master-Detail(Item)
Last Modified By
LastModifiedById
Lookup(User)
Order Id
Name
Auto Number
Order Status
Order_Status__c
Picklist


Search Setup
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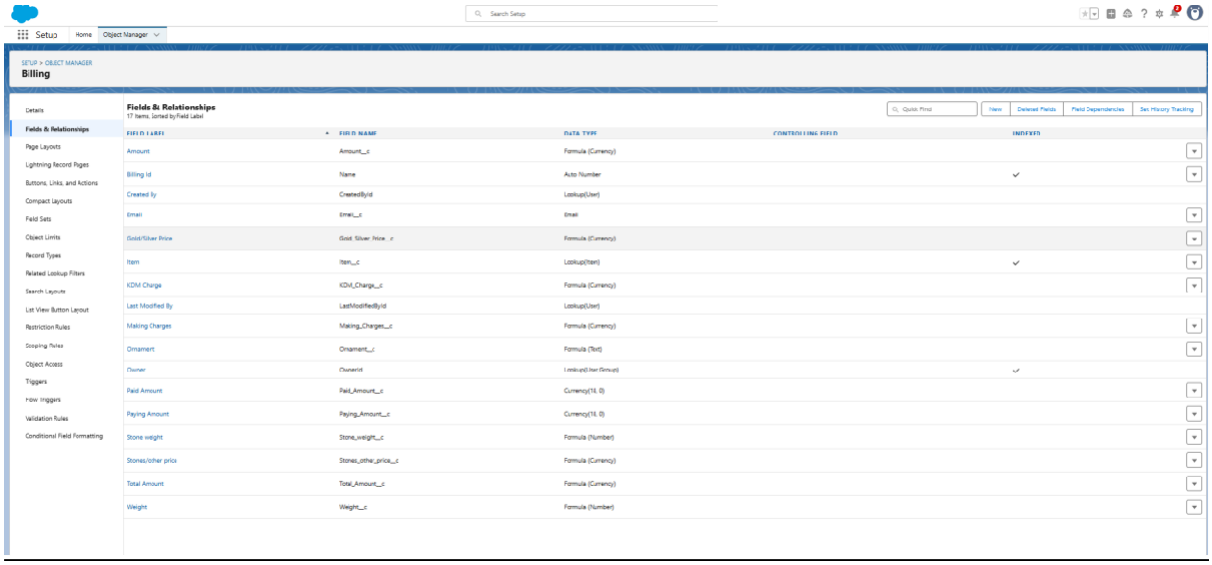
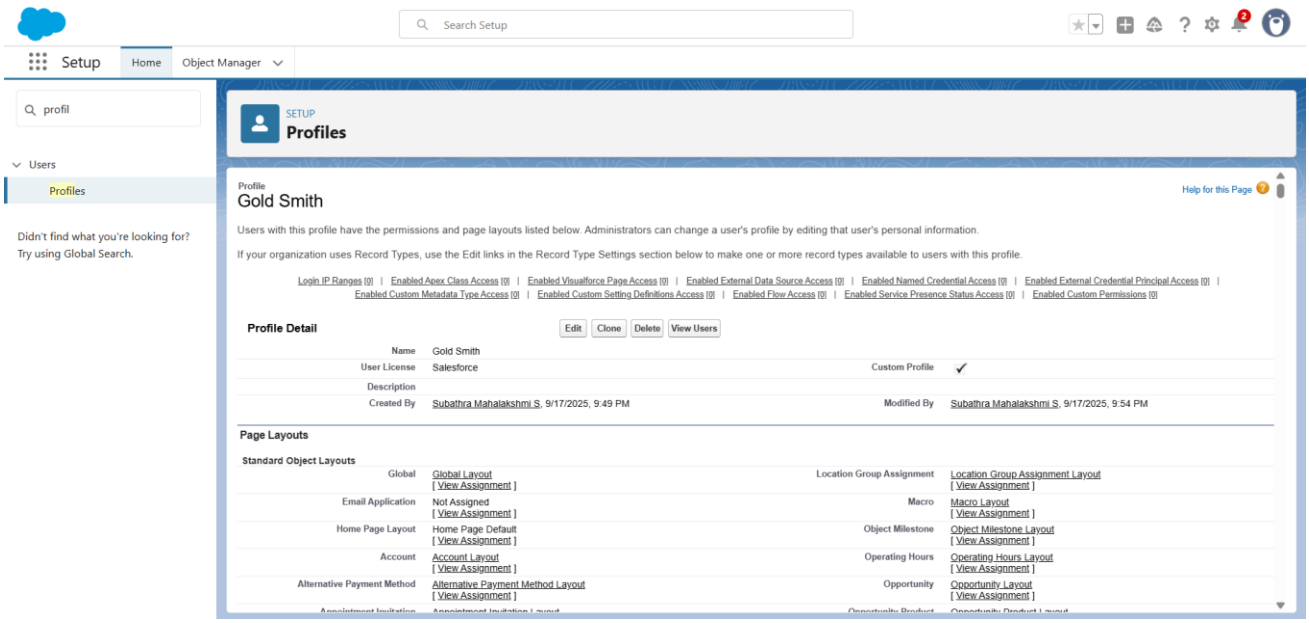
List View Button Layout
Fields & Relationships
5 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
Gold Price
Gold_Price__c
Currency(8, 0)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
Price Name
Name
Auto Number
Silver Price
Silver_Price__c
Currency(8, 5)



GoldSmithProfile

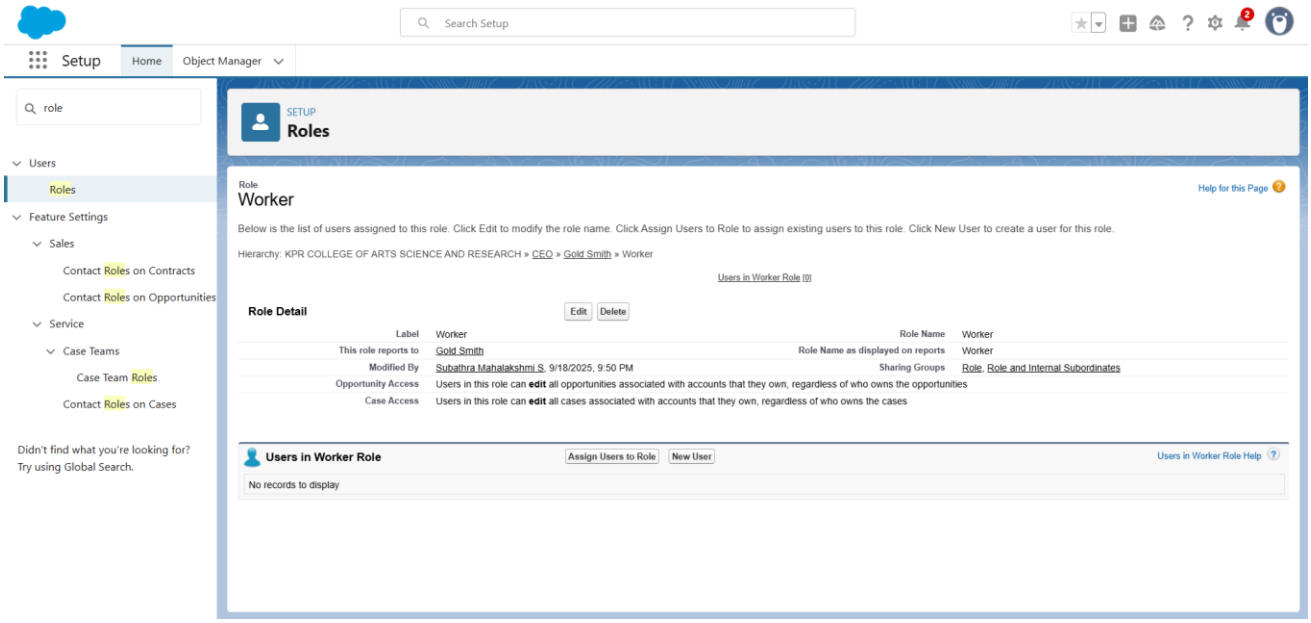
Tocreateanewprofile:

1. Gotosetup>>typeprofilesinquickfindbox>>clickonprofiles?clonethe desiredprofile(SystemAdministrator)>>enterprofilename(GoldSmith) >> Save.
2. Whilestillontheprofilepage,thenclickEdit.
3. ScrolldowntoCustomObjectPermissionsandGiveaccesspermissionsf or Jewel Customer,Item,CustomerOrder,Prices,Billings .
4. ScrolldownandClickonSave.



WorkerProfile

1. Gotosetup>>typeprofilesinquickfindbox>>clickonprofiles>>clone the desiredprofile (SalesforcePlatformUser) >> enter profile name (Worker) >> Save.
2. Whilestillontheprofilepage,thenclickEdit.
3. ScrolldowntoCustomObjectPermissionsandGiveaccesspermissionsf or Items,Price and Customer Order objects.
4. ScrolldownandClickonSave.

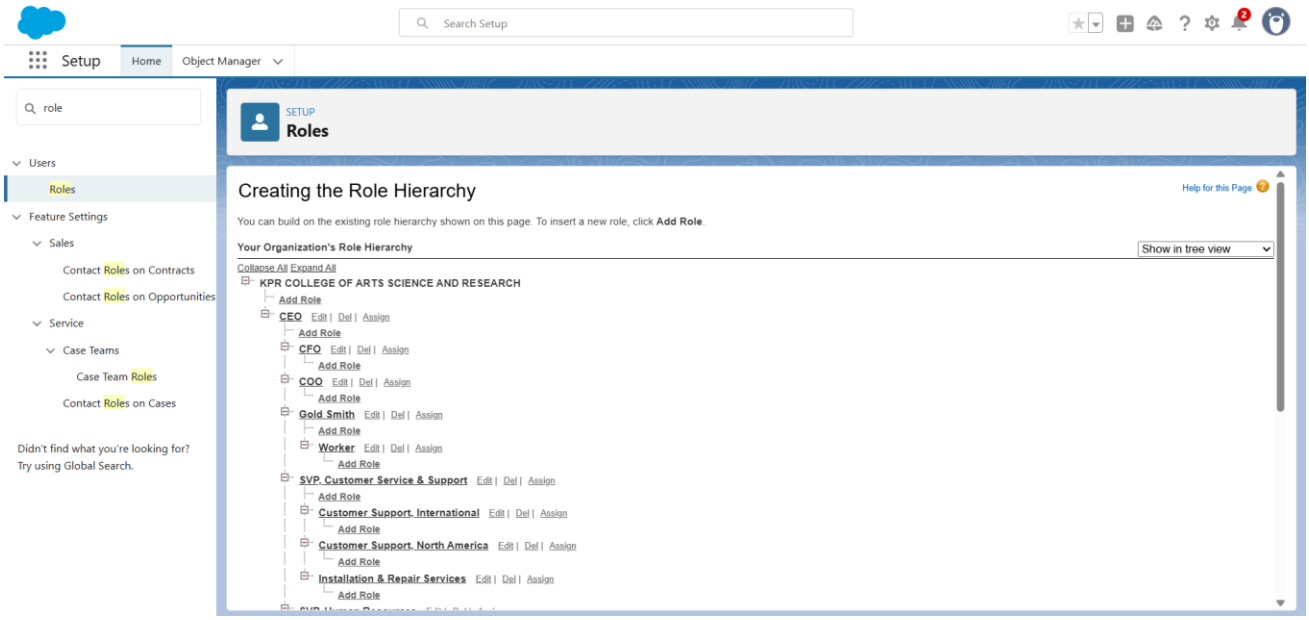


CreatingGoldSmithRole

1. Fromsetup,Gotoquickfind>>SearchforRoles>>clickonsetuproles.
2. ClickonExpandAllandclickonaddroleunderwhomthisroleworks.
3. GiveLabelas“GoldSmith”andRolenamegetsautopopulated.Checkto whom this role (Gold Smith) reports. Then click on Save.

CreatingWorkerRole

1. Fromsetup,Gotoquickfind>>SearchforRoles>>clickonsetuproles.
2. ClickonExpandAllandclickonaddroleunderwhomthisroleworks.
3. GiveLabelas“Worker”andRolenamegetsautopopulated.Checktowhom this role (Gold Smith) reports. Then click on Save.



CreateUser

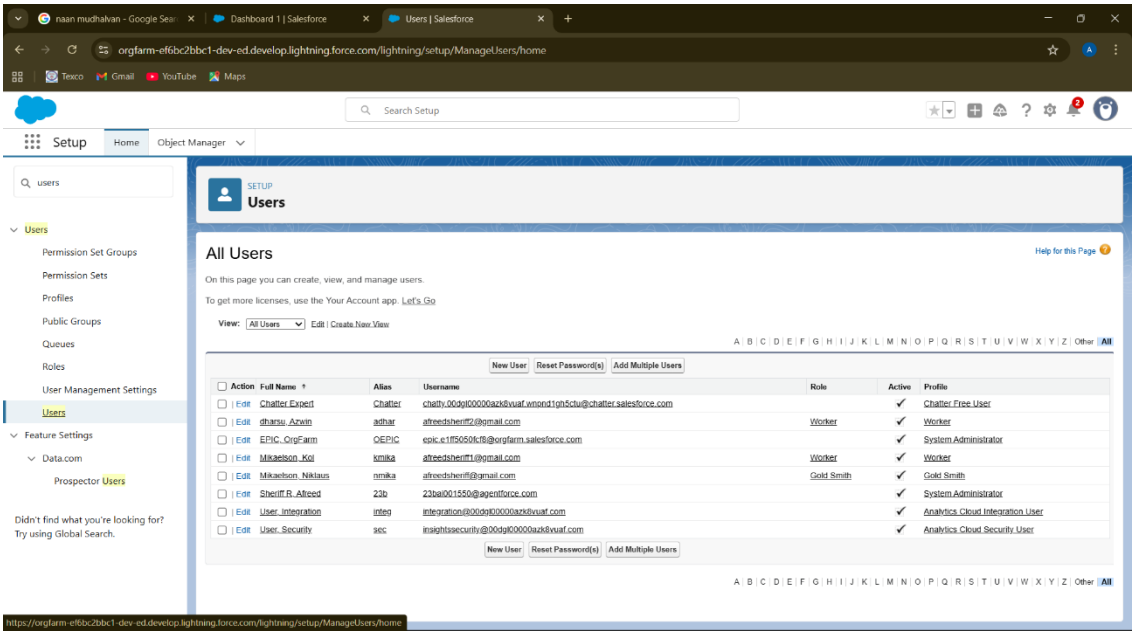
1. Gotosetup>>typeusersinquickfindbox>>selectusers>>clickNew user.
2. Fillinthefields
    1. FirstName :Niklaus
    2. LastName :Mikaelson
    3. Alias :GiveaAliasName
    4. Emailid :GiveyourPersonalEmailid
    5. Username :Usernameshouldbeinthisform:text@text.text
    6. NickName:GiveaNickname
    7. Role :Gold Smith
    8. Userlicence:Salesforce
    9. Profiles :Gold Smith

CreateUser

1. Gotosetup>>typeusersinquickfindbox>>selectusers>>clickNew user.
2. Fillinthefields
    - FirstName:Kol
    - LastName:Mikaelson
    - Alias :GiveaAlias Name
    - Emailid:GiveyourPersonalEmailid
    - Username:Usernameshouldbeinthisform:text@text.text
    - NickName:GiveaNickname
    - Role:Worker

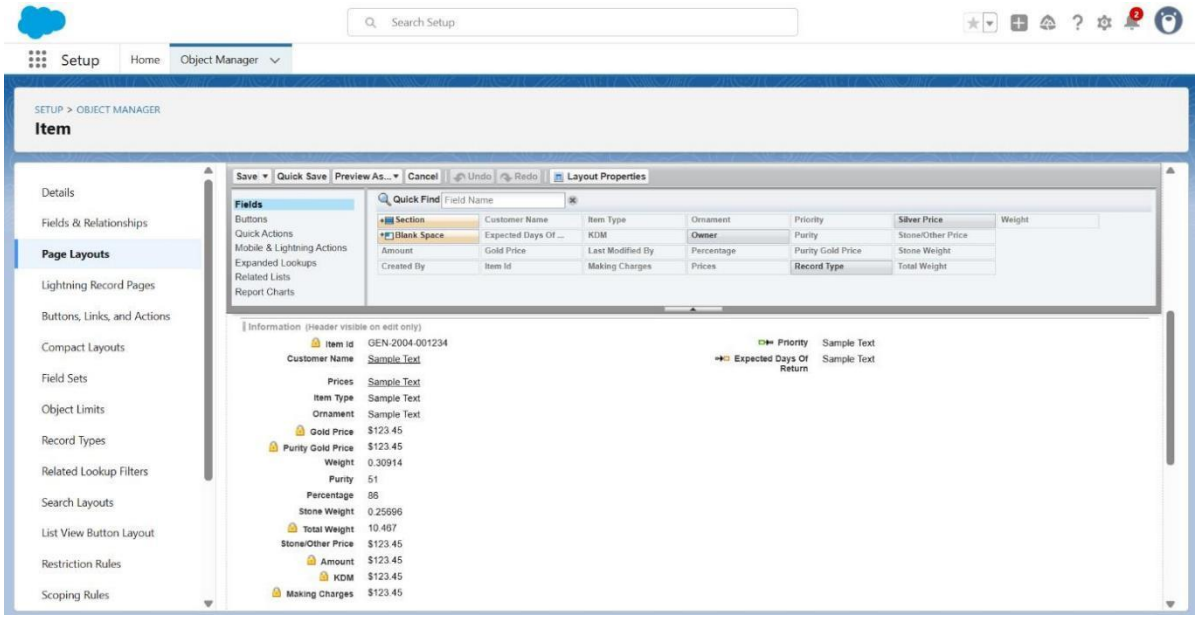
- Userlicence:SalesforcePlatform
- Profiles:Worker

3. Save.



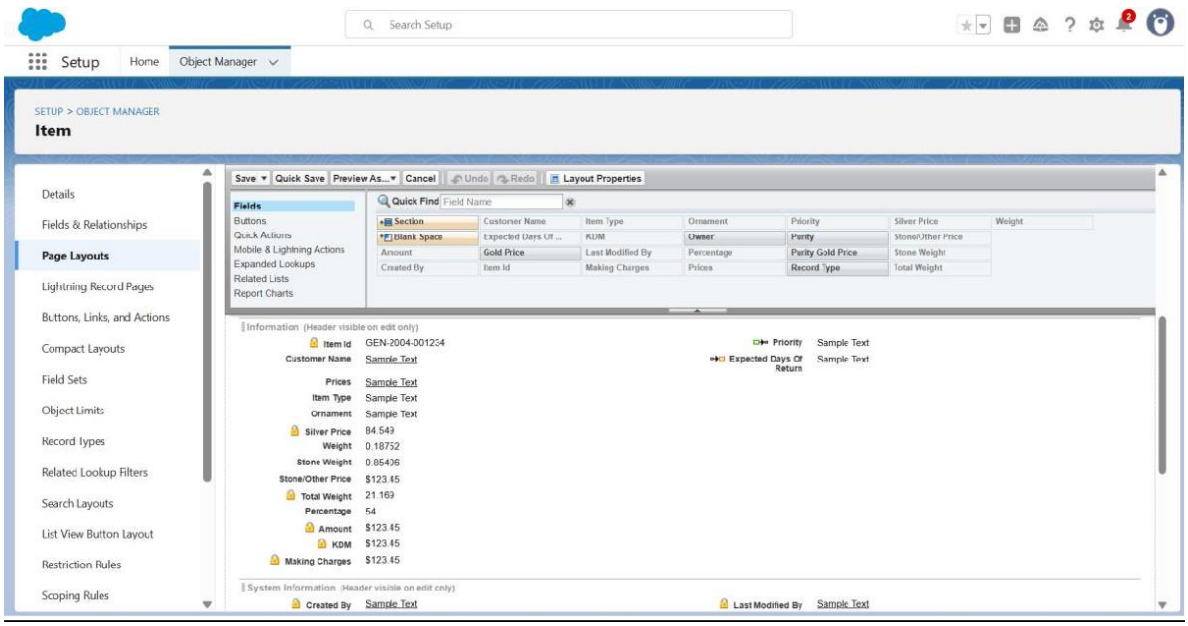
ToCreateaGoldPage layout

1. GotoSetup>>ClickonObjectManager>>Searchfortheobject(Item)>> From drop down click on Edit.
2. ClickonPagelayout>>ClickonNew.
3. GivePagelayoutNameas“PageLayoutforGold”andclickonSaveand New.
4. ArrangethefieldasshownintheInformationSection,removefieldswhich are related to Silver and click Ok.
5. ClickSave.
6. Makesureyourpagelayoutlookslikethepictureabove.



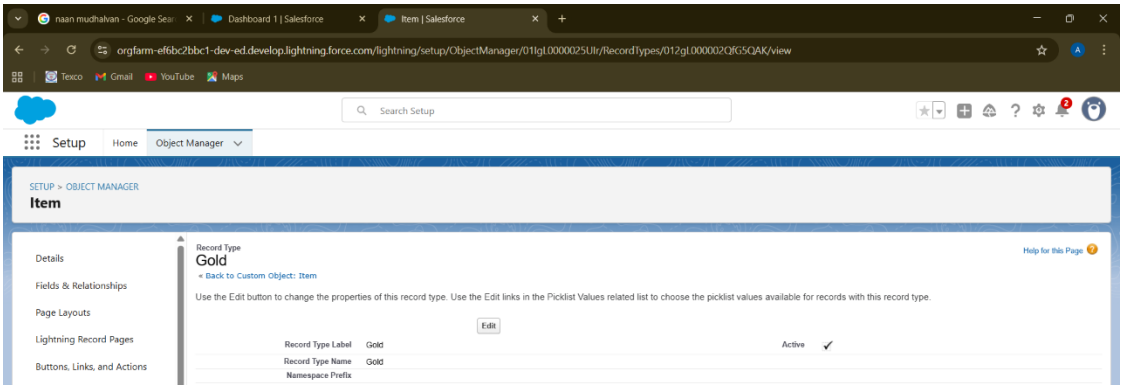
ToCreateaSilverPagelayout

1. GotoSetup>>ClickonObjectManager>>Searchfortheobject(Item)>> From drop down click on Edit.
2. ClickonPagelayout>>ClickonNew.
3. GivePagelayoutNameas“PageLayoutforSilver”andclickonSave.
4. ArrangethefieldasshownintheInformationSection,removefieldswhich are related to Goldand click Ok.



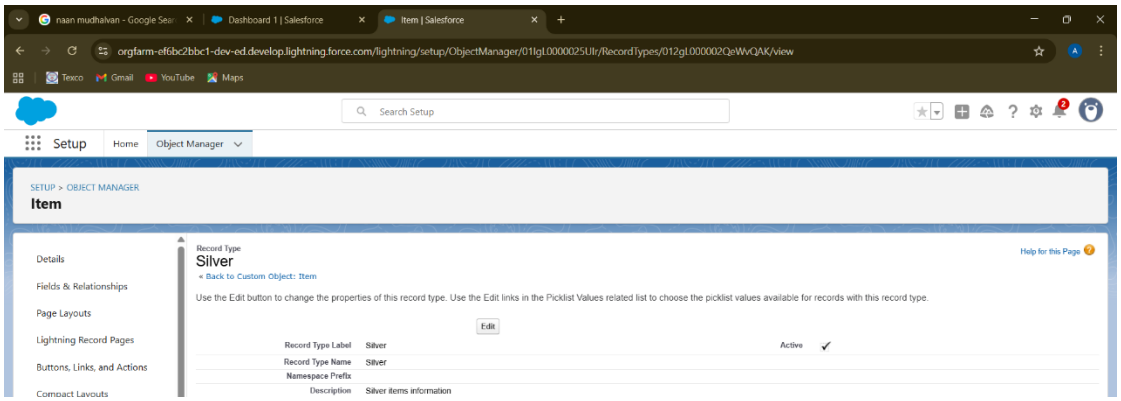
TocreateaRecordType

1. Gotosetup>>clickonObjectManager>>typeobjectname(Item)inquick find bar? click on the object.
2. ClickontheRecordTypes>>clickNew.
3. SelectExistingRecordas“Master”,RecordtypeLabelas“Gold”,Descriptionas “Gold items information”.
4. Uncheckfor“MakeAvailable”.
5. ScrolldownandcheckfortheGoldSmith,WorkerJW&System Administrator profile and click on Next.
6. Select“Applyadifferentlayoutforeachprofile”,andchangepagelayoutto “PageLayoutforGold“forGoldSmith,WorkerandSystemAdministrator? save & new.



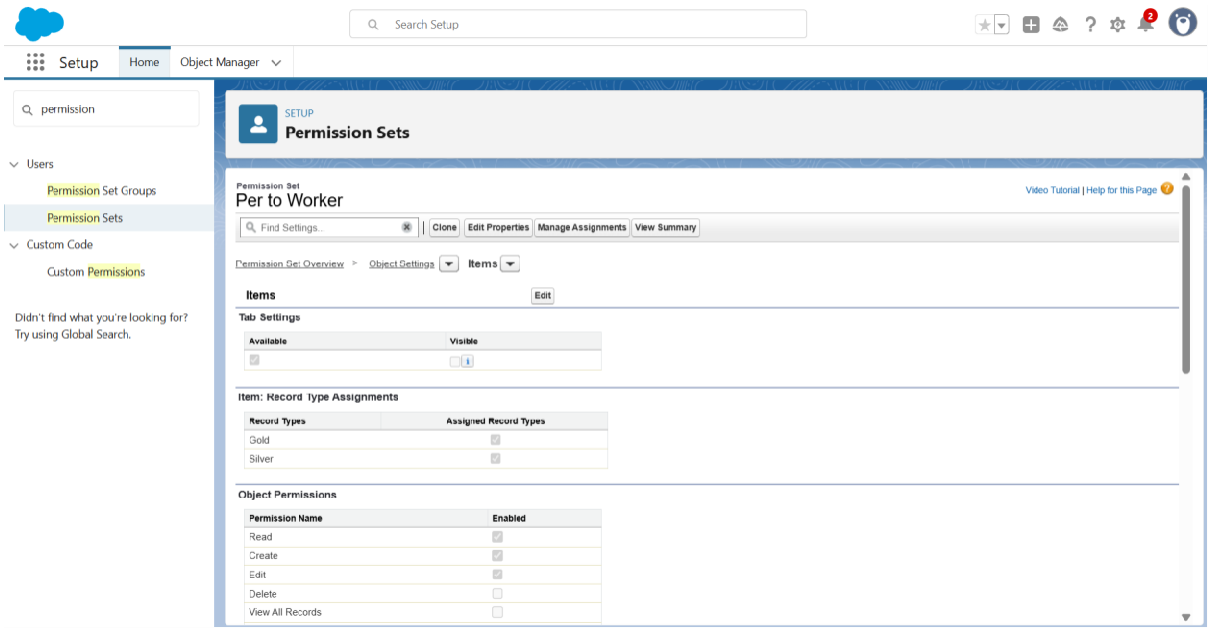
TocreateaRecordType

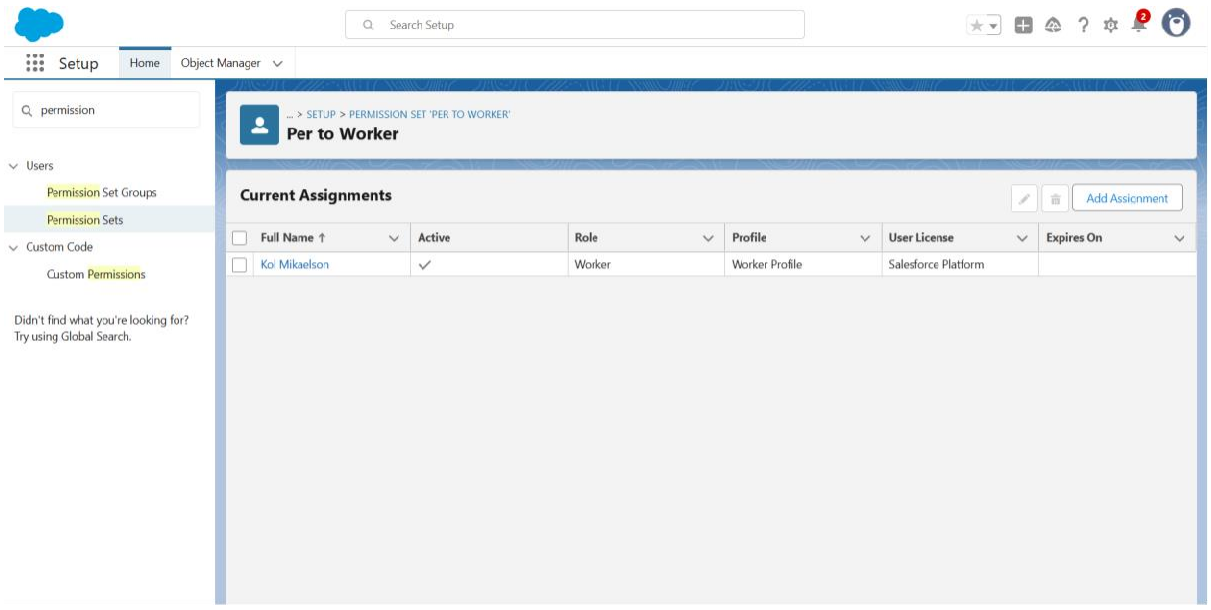
1. Gotosetup>>clickonObjectManager>>typeobjectname(Item)inquick find bar? click on the object.
2. ClickontheRecordTypes>>clickNew.
3. SelectExisting Recordas “Master”,RecordtypeLabelas “Silver”,Descriptionas “Silver items information”.
4. Uncheckfor“MakeAvailable”.
5. ScrolldownandcheckfortheGoldSmith,WorkerJW&System Administrator profile and click on Next.
6. Select“Applyadifferentlayoutforeachprofile”,andchangepagelayoutto “PageLayoutforSilver“forGoldSmith,WorkerandSystemAdministrator? save & new.



Creatingpermissionset

1. Gotosetup>>type“permissionsets”inquicksearch>>selectpermissio n sets >> New.
2. Enterthelabelnameas“PertoWorker”,APIwillbeautopopulated?save.
3. UnderAppsSelectobjectsettings.
4. Click on Items object ? click on Edit ? under Item:Record Type Assignments,enableGold,Silver?Objectpermissioncheckforread,edita nd create.
5. ClickonSave.
6. AftersavingthepermissionclickontheManageassignment
7. NowclickontheAddAssignment.
8. Nowselecttheuserswhichyouhavecreatedinusermileston e, usingWorker profile and click on Next ? Assign? Done.





CreateaTriggerHandlerclass

CODE:

```
publicclassUpdatePaidAmountTriggerHandler{
    public static void handleBeforeInsert(List<Billing
        _____c>newBillings){ for (Billing
        _____cbilling:newBillings){
            billing.Paid_Amountc=billing.Paying_Amount c;
        }
    }

    public static void handleBeforeUpdate(Map<Id, Billing
_____c>oldBillingsMap, List<Billing
_____c>updatedBillings) {
        for(Billing_cbilling:updatedBillings){
```

```
            Billing_coldBilling=oldBillingsMap.get(billing.Id);
            Decimal oldPaidAmount =
            oldBilling.Paid_Amount_____c;
            billing.Paid_Amountc=oldPaidAmount+billing.Paying_Amount__c;
        }
    }
}
```

Createthetrigger

CODE:

```
trigger UpdatePaidAmountTrigger on Billing
    _____c(beforeinsert,beforeupdate)
    { if (Trigger.isInsert) {
        UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);
    } else if (Trigger.isUpdate) {
        UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap,
Trigger.new);
    }
}
```

CreateaRecord(JewelCustomer)

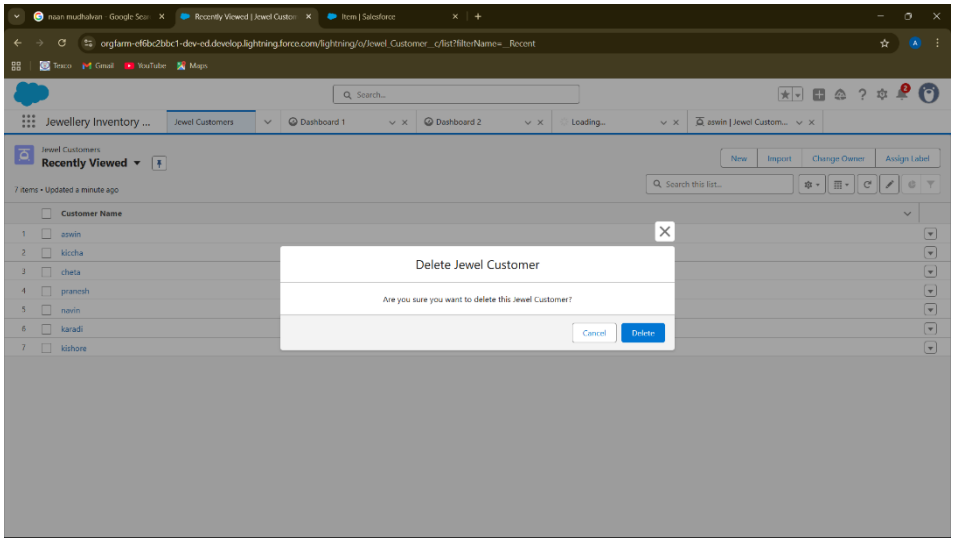
1. ClickonAppLauncherontheleftsideofthescreen.
2. SearchJewelryInventorySystem&clickonit.
3. ClickonDropDownandClickontheJewelCustomertab.
4. ClickNew.
5. FilltheDetailsandclickonSave.

ViewaRecord(JewelCustomer)

1. ClickonAppLauncherontheleftsideofthescreen.
2. SearchJewelryInventorySystem&clickonit.
3. ClickontheJewelCustomerTab.
4. Clickonanyrecordname.youcanseethedetailsoftheJewelCustomer.

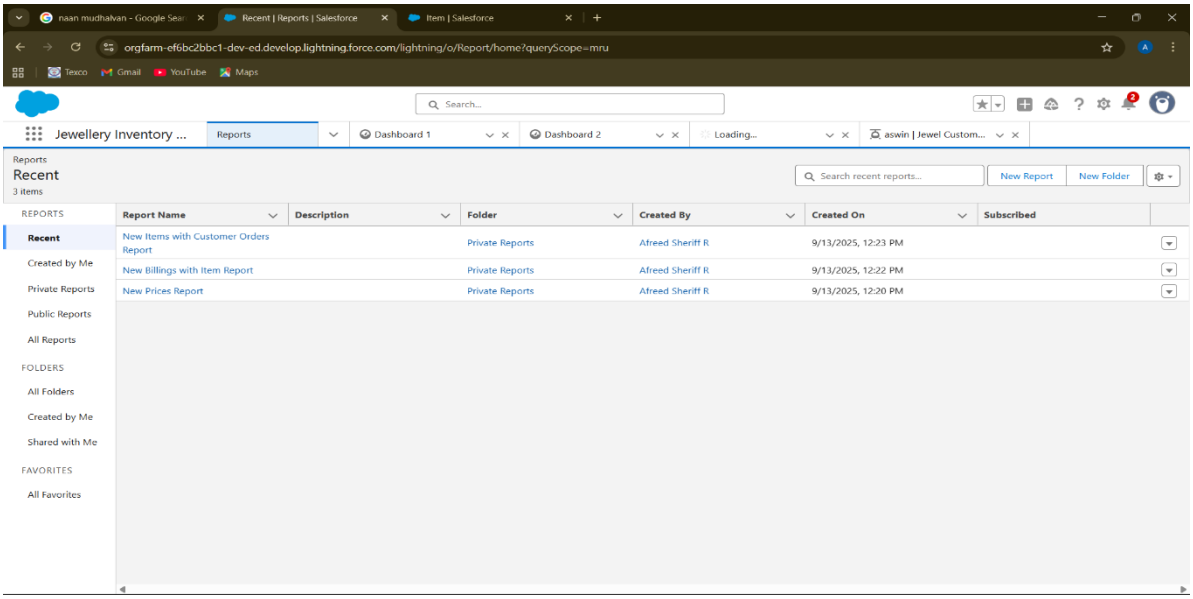
DeleteaRecord(JewelCustomer)

1. ClickonAppLauncherontheleftsideofthescreen.
2. SearchJewelryInventorySystem&clickonit.
3. ClickontheJewelCustomerTab.
4. ClickonArrowatrighthandsideonthatParticularrecord.
5. Clickdelete.



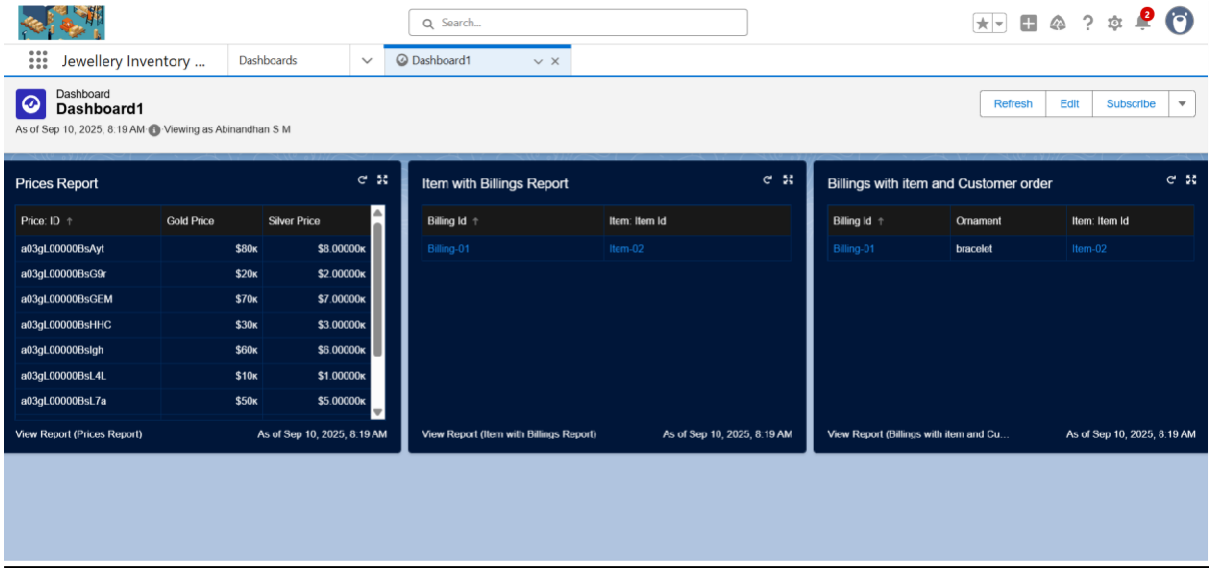
Create Report

1. Gototheapp>>clickonthereports tab
2. ClickNewReport.
3. Selectreporttypefromcategoryorfromreporttypepanelorfromsearch panel ? click on start report.
4. Customiseyourreport
5. Addfieldsfromtheleftpaneasshown.
6. Saveorrunit.
7. Createareportwithreporttype:“ItemwithBillings”.
8. Createareportwithreporttype:“BillingswithitemandCustomerorder”.



Create Dashboard

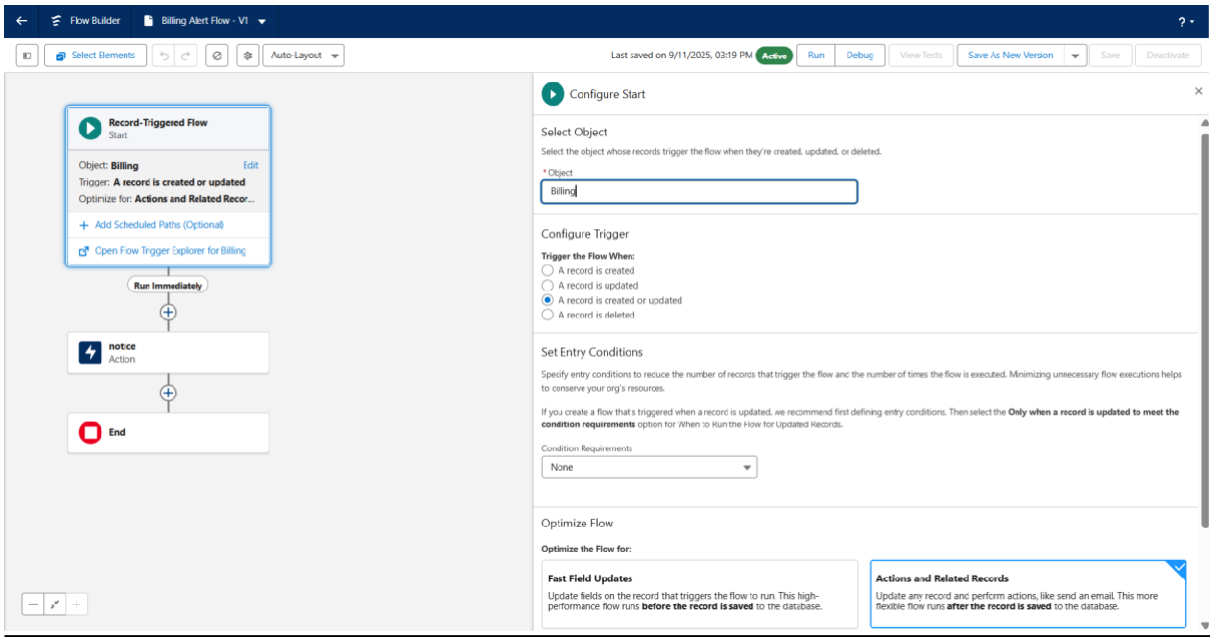
1. Gototheapp>>clickontheDashboardstabs.
2. GiveaNameandclickonCreate.
3. Selectaddcomponent.
4. SelectaReportandclickonselect.
5. ClickAddthenclickonSaveandthenclickonDone.

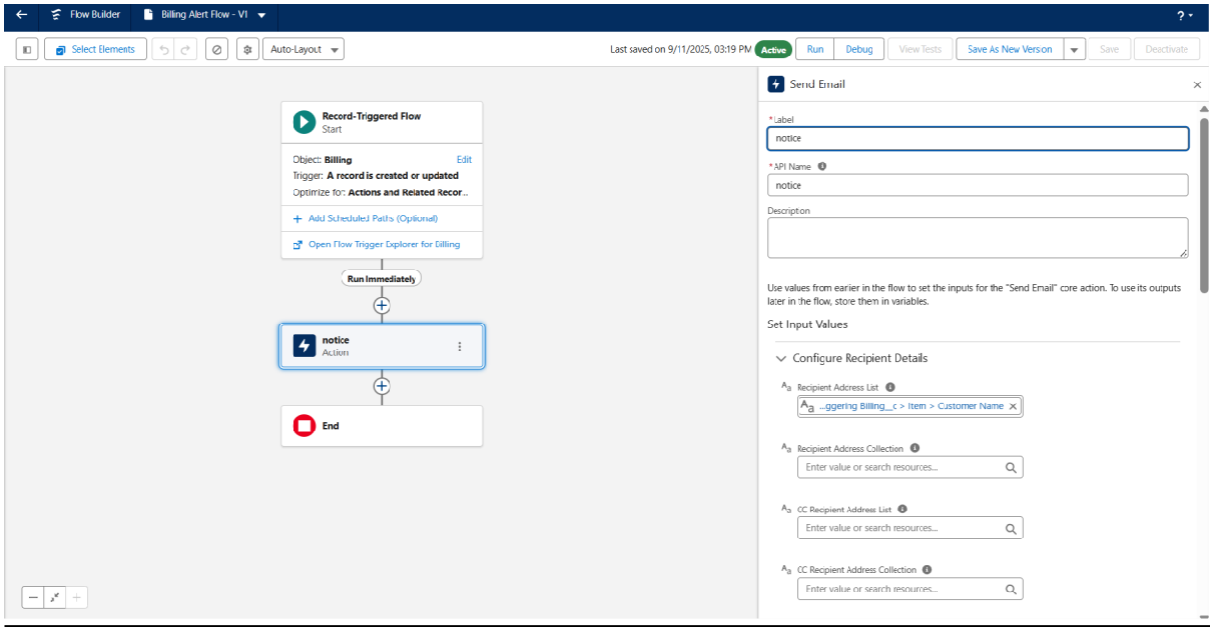


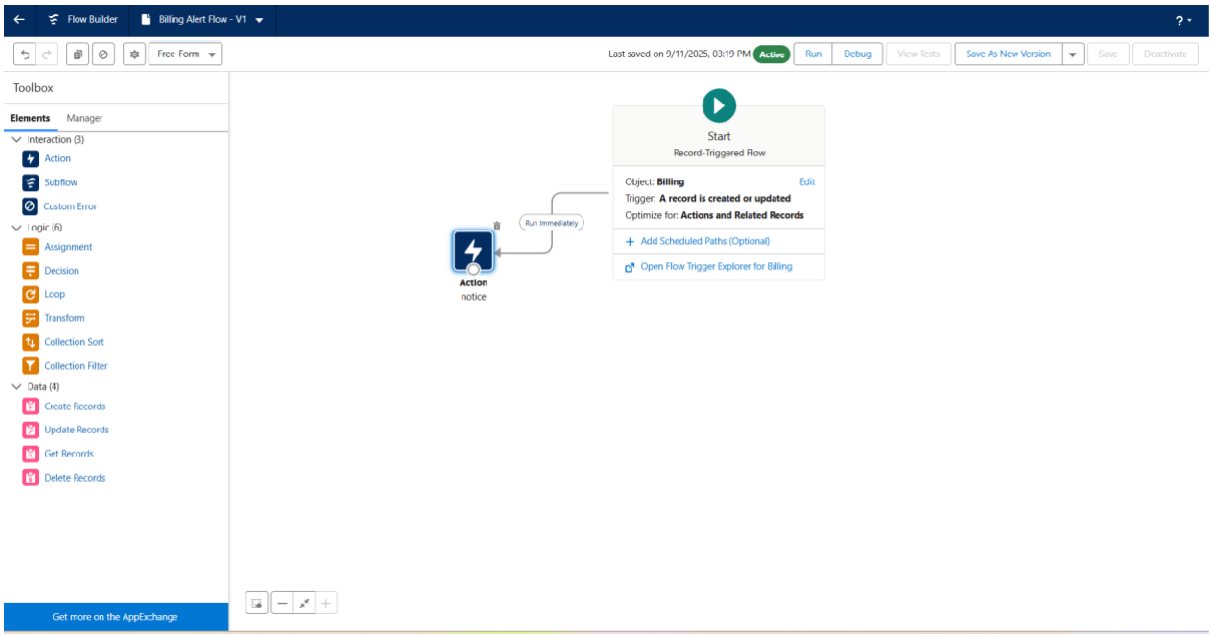
CreateaFlow

1. Gotosetup>>typeFlowinquickfindbox>>ClickontheFlowand Select the New Flow.
2. SelecttheRecord-triggeredflowandClickonCreate.
3. SelecttheObjectasa“Billing”intheDropdownlist.
4. SelecttheTriggerFlowwhen:“ArecordisCreatedorUpdated”.
5. SelecttheOptimisetheflowfor:“ActionsandRelatedRecords”andClick on Done.
6. NowchangethemodeformAuto-layouttofree-form.
7. Nowselectthemangeroptioninthetoolbox,clickNewresource.
8. Selecttheresourcetypeastexttemplate.
9. ChangetheviewasRichText?ViewtoPlainText.
10. Inthebodyfieldpastethesyntaxthatisgivenbelow.
    Hello
    CustomerName:{!$Record.Itemr.Customer_Name_r.Name}
    HerearethedetailsfortheitemyoupurchasedwithJewelleryInventory System
    Item Type: {!$Record.Item
    _____r.Item_Type_c}
    Ornament: {!$Record.Ornament
    _____c}
    Weight: {!$Record.Weight
    _____c}gram
    sAmount: {!$Record.Amount
    _____c}
11. Clickdone.
12. Nowclickonelements,anddragtheactionelementintothepreview pane.
13. Theiractionbarwillbeopenedinthatsearchfor“sendemail”and click on it.
14. Givethelabelnameas“notice”
15. APInamewillbeautopopulated.

16. Enablethebodyinsetinputvaluesfortheselectedaction.
17. Selectthetexttemplatethatwascreated.
18. IncludeRecipientAddresslist,selecttheemailformtherecor d. ({!$Record.Item_r.Customer_Namer.Email_c})
19. Includethesubjectas“WelcometoJewelryInventorySystem”.
20. Clickdone.
21. Nowdragthepathfromthestarttotheactionelement.
22. Clickonsave.GiventheFlowlabel,FlowApinamewillbeauto populated.
23. Andclicksave,andclickonactivate.






Flow Builder
Billing Alert Flow - V1
Free Form
Last saved on 9/11/2025, 03:19 PM
Active
Run
Debug
View Tests
Save As New Version
Save
Deactivate
Toolbox
Elements
Manager
Interaction (3)
Action
Subflow
Custom Error
Logic (6)
Assignment
Decision
Loop
Transform
Collection Sort
Collection Filter
Data (4)
Create Records
Update Records
Get Records
Delete Records
Get more on the AppExchange
Start
Record-Triggered Flow
Object: Billing
Edit
Trigger: A record is created or updated
Optimize for: Actions and Related Records
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Billing
Run Immediately
Action
notice