

CRM APPLICATION FOR JEWEL MANAGEMENT



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INTRODUCTION:

Project Overview

Project Name:

CRM Application for Jewel Management

Overview:

The **CRM Application for Jewel Management** is a comprehensive software solution designed to streamline and automate the operations of jewelry businesses. This application aims to improve customer relationship management, enhance inventory control, optimize sales processes, and support better decision-making through data analytics.

Jewelry businesses handle a wide variety of products—such as gold, silver, diamond, and custom jewelry—which require precise tracking and customer-specific interactions. Traditional manual methods can lead to errors, customer dissatisfaction, and poor inventory management. This CRM application addresses those challenges by providing a centralized, user-friendly digital platform tailored specifically for the jewelry industry.

Target Users:

- Jewelry retail stores
- Jewelry chains and franchises
- Wholesale jewel distributors
- Boutique and custom jewel designers
- Workshop managers (for repair/service tracking)

Core Modules:

1. Customer Management
2. Product & Inventory Management
3. Sales & Order Processing
4. Billing & Invoicing

☑ **Benefits:**

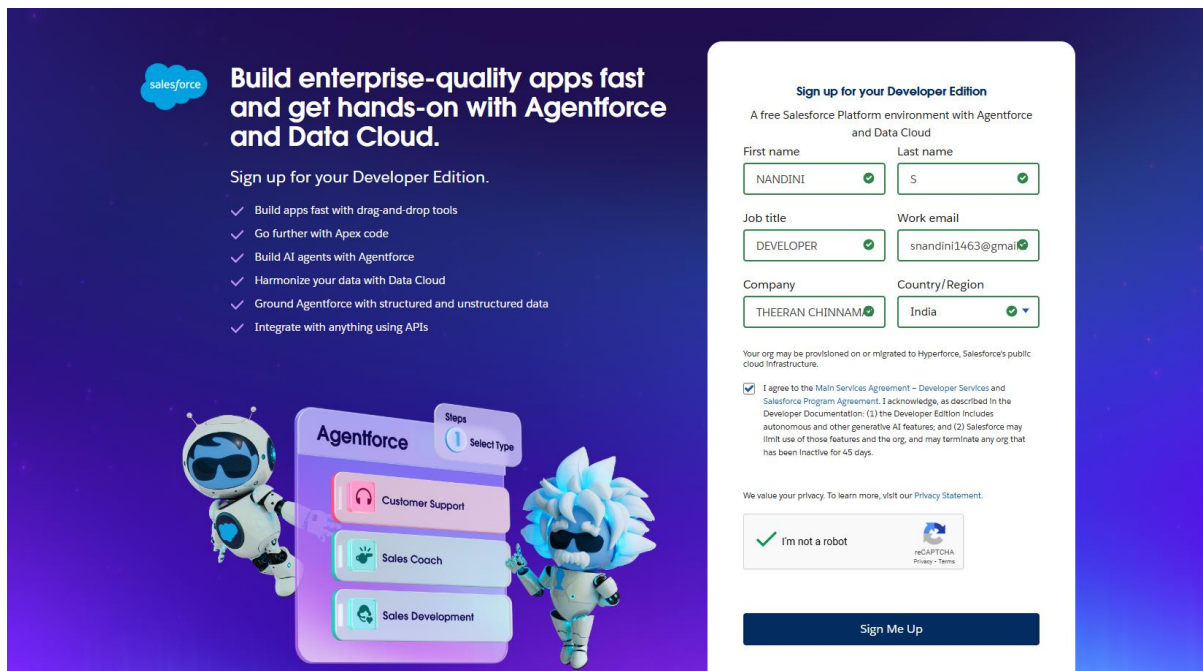
- Improved customer satisfaction through better service tracking and communication.
- Reduced errors and time in managing inventory and billing.
- Enhanced marketing through targeted messages and offers.
- Increased efficiency and profitability through automation and data-driven insights.



DEVELOPMENT PHASE:

Creating Developer Account:

By using this URL: <https://developer.salesforce.com/signup>



The image shows the Salesforce Developer Edition signup page. On the left, there's a blue header with the Salesforce logo and the text "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists five benefits: building apps fast with drag-and-drop tools, going further with Apex code, building AI agents with Agentforce, harmonizing data with Data Cloud, and integrating with APIs using APIs. There are two cartoon characters, one on the left and one on the right, both wearing space helmets. In the center, there's a "Steps" section with "1 Select Type" and three options: "Customer Support", "Sales Coach", and "Sales Development". On the right, there's a "Sign up for your Developer Edition" form. It includes fields for First name (NANDINI), Last name (S), Job title (DEVELOPER), Work email (snandini1463@gmail.com), Company (THEERAN CHINNAM), and Country/Region (India). Below the form, there's a checkbox for agreeing to the Main Services Agreement and a reCAPTCHA "I'm not a robot" checkbox. At the bottom right, there's a "Sign Me Up" button.

Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

Sign up for your Developer Edition.

- ✓ Build apps fast with drag-and-drop tools
- ✓ Go further with Apex code
- ✓ Build AI agents with Agentforce
- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs

Agentforce

Steps
1 Select Type

- Customer Support
- Sales Coach
- Sales Development

Sign up for your Developer Edition

A free Salesforce Platform environment with Agentforce and Data Cloud

First name: NANDINI ✓ Last name: S ✓


Job title: DEVELOPER ✓ Work email: snandini1463@gmail.com ✓

Company: THEERAN CHINNAM ✓ Country/Region: India ✓

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

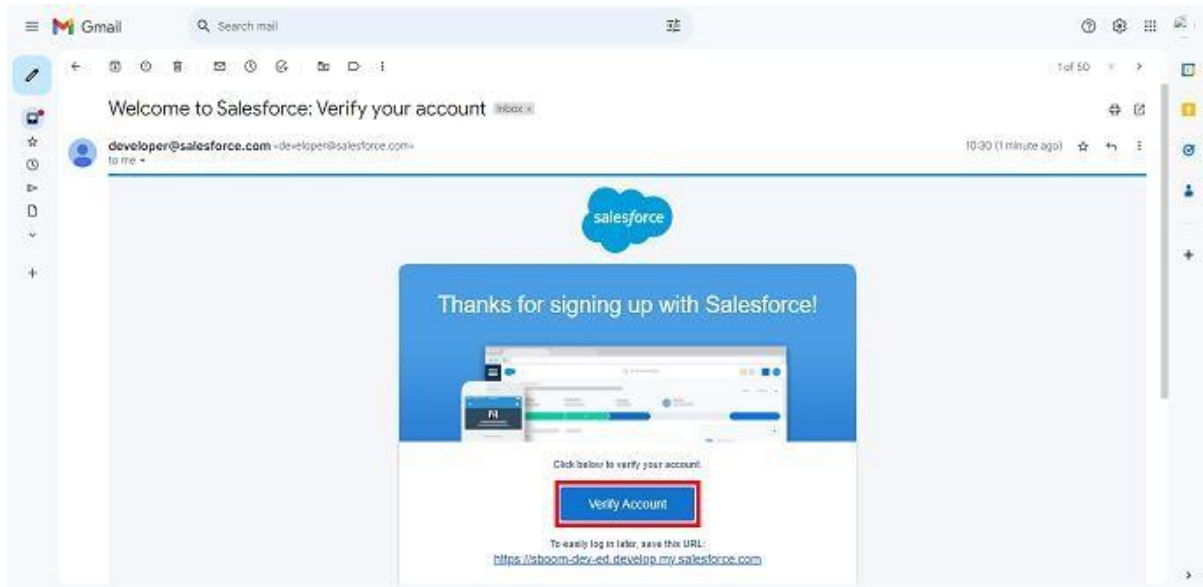
☒ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features, and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

We value your privacy. To learn more, visit our [Privacy Statement](#).

☒ I'm not a robot 

Sign Me Up

Account Activation:



Change Your Password

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

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

* New Password

..... Good

* Confirm New Password

..... Match


Security Question

▼ In what city were you born?

* Answer

asdfghjkl

Change Password



Search Setup

Setup Home Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App


Lightning Usage

Optimizer

ADMINISTRATION

> Users


SETUP Home Create



Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.


[Get Started](#)



Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

[Learn More](#)



Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

[Get Started](#)



Objectives of the Project

1. Enhance Customer Relationship Management

- To maintain comprehensive customer profiles including purchase history, preferences, contact details, and special dates for personalized services.

2. Streamline Sales and Order Processing

- To automate sales transactions, quotations, invoicing, and payment tracking to improve the overall customer buying experience.

3. Efficient Inventory Management

- To enable real-time tracking and management of jewelry items (gold, silver, diamonds, gemstones, etc.), including stock updates and alerts for low inventory.

4. Simplify Repair and Service Handling

- To manage customer repair requests and track the status of jewelry service orders with automatic updates and notifications.

5. Generate Accurate Billing and Invoices

- To produce professional, GST-compliant invoices with support for multiple payment methods and transaction histories.

6. Improve Customer Engagement and Retention

- To send personalized SMS/email campaigns, reminders for important dates, promotional offers, and festive greetings to strengthen customer loyalty.

7. Enable Role-Based Access and Security

- To manage different user roles (admin, sales staff, inventory manager) with appropriate access controls to ensure data security and operational efficiency.

8. Provide Analytical Reports and Dashboards

- To offer real-time reports on sales, inventory, and customer activity for better business decisions and strategy planning.

9. Ensure Data Backup and Reliability

- To maintain secure data storage with backup features to prevent data loss and ensure business continuity.

10. Create a Scalable and User-Friendly System

- 11. To build an intuitive, scalable application that can adapt to the growing needs of a jewelry business—whether small or large.

Create Jewel Customer Object

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

SETUP

New Custom Object

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit

SaveSave & NewCancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label

Jewel Customer

Example: Account

Plural Label

Jewel Customers

Example: Accounts

Starts with vowel sound

☐

The Object Name is used when referencing the object via the API.

Object Name

Jewel_Customer

Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Content Name

None

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

Jewel Customer Name

Example: Account Name

Data Type

Text

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

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

☐ 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

SaveSave & NewCancel

Create Item Object

Customer order

SETUP > OBJECT MANAGER

Customer Order

Details

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

Edit Custom Object

Customer Order

Help for this Page

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Context Name

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.

Display Format Example: A-00000 What Is This?

Optional Features

☒ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing [i](#)

Optional Features

☒ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing [i](#)

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 th](#)

☐ 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

Save Save & New Cancel

, Price, Billing objects

Tabs:

A **Tab** is a user interface element used to

- **Create and view records** for objects.
- **Navigate** easily through Salesforce applications.

Types of Tabs in Salesforce:


1. **Custom Tabs**
 - Interface for custom objects you create.
 - Behave like standard tabs (e.g., Accounts, Contacts).
2. **Web Tabs**
 - Display **external web content** or applications inside Salesforce.
 - Useful for quick access to frequently used web tools.
3. **Visualforce Tabs**
 - Display **Visualforce pages**.
 - Useful for custom UI or logic.
4. **Lightning Component Tabs**
 - Add **Lightning components** to the navigation menu in Lightning Experience and Salesforce mobile app.
5. **Lightning Page Tabs**
 - Add **Lightning Pages** to mobile app navigation.
 - **Note:** Do not appear on the "All Tabs" page or in the "Available Tabs" list during app customization.

Use Case (Jewel Management CRM Application)

- Creating **Objects** to store **Jewels data** is a primary step.
- To allow **Owners (e.g., Goldsmiths)** to **access this data**, Admin needs to **create Tabs**.
- Benefits of Tabs:
 - Improved **user experience**.
 - Easier **navigation**.
 - Quick access to **critical data**.
 - Better **productivity** and **efficient utilization** of Salesforce.

To create a Tab:(Item)

Customer Order



 **SETUP**
Tabs

Edit Custom Object Tab
Customer Orders

Fill in the fields below to define the custom tab.

Custom Tab Definition Edit

Custom Object Tab Information

Tab Label	Customer Orders
Object	<u>Customer Order</u>
Tab Style	 Bell 


(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link **--None--** ▼


Enter a short description.

Description

Price:

 **SETUP**
Tabs



Edit Custom Object Tab
Prices

Help for this Page 

Fill in the fields below to define the custom tab.

Custom Tab Definition Edit

Custom Object Tab Information

Tab Label	Prices
Object	<u>Price</u>
Tab Style	 Desk 


(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link **--None--** ▼

Enter a short description.

Description

Billing:

 **SETUP**
Tabs

Edit Custom Object Tab

Billings

Help for this Page

Fill in the fields below to define the custom tab.

Custom Tab Definition Edit

Custom Object Tab Information

Tab Label

Object

Tab Style

Billings

Billing

Books

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link

--None--

Enter a short description.

Description

Save

Cancel

Create a Lightning App:

New lightning App:

Setup

Home

Object Manager

Q app manager

Apps

App Manager

External Client Apps

External Client App Manager

Didn't find what you're looking for? Try using Global Search.

SETUP

Lightning Experience App Manager

New Lightning App

New External Client App

27 Items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

	App Name	Developer Name	Description	Last Modified Date	App Type	Visible L...	
1	All Tabs	AllTabSet		8/25/2025, 2:56 PM	Classic		
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	8/25/2025, 2:56 PM	Classic	✓	
3	App Launcher	AppLauncher	App Launcher tabs	8/25/2025, 2:56 PM	Classic	✓	
4	Approvals	Approvals	Manage approvals and approval flows	8/25/2025, 2:56 PM	Lightning	✓	
5	Automation	FlowsApp	Automate business processes and repetitive tasks.	8/25/2025, 3:01 PM	Lightning	✓	
6	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	8/25/2025, 2:56 PM	Lightning	✓	
7	Community	Community	Salesforce CRM Communities	8/25/2025, 2:56 PM	Classic	✓	
8	Content	Content	Salesforce CRM Content	8/25/2025, 2:56 PM	Classic	✓	
9	Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	8/25/2025, 2:56 PM	Lightning	✓	
10	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	8/25/2025, 2:56 PM	Lightning	✓	
11	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	8/25/2025, 2:56 PM	Lightning	✓	
12	Jewellery Inventory System	Jewellery_Inventory_System	Elevate your look with elegance	9/1/2025, 1:25 AM	Lightning	✓	
13	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	8/25/2025, 2:56 PM	Lightning	✓	
14	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	8/25/2025, 2:56 PM	Classic	✓	

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name ⓘ
Jewellery Inventory System.

*Developer Name ⓘ
Jewellery_Inventory_System

Description ⓘ
Elevate your look with elegance

App Branding

Image ⓘ

Upload

Primary Color Hex
Value ⓘ

#0070D2

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

J I

Jewellery Inventory System.
Elevate your look with elegance

Next

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename them only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Create ▼

Type to filter list...

Accounts

Activation Targets

Activations

All Sites

Alternative Payment Methods

Analytics

App Launcher

Appointment Categories

Appointment Invitations

Approval Requests

Selected Items

Jewel Customers

Items

Customer Orders

Prices

Billings

Reports

Dashboards

▶

◀

▲

▼

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Type to filter list...

Analytics Cloud Integration User

Analytics Cloud Security User

Anypoint Integration

Authenticated Website

Authenticated Website

B2B Reordering Portal Buyer Profile

Contract Manager

Custom: Marketing Profile

Custom: Sales Profile

Custom: Support Profile

Selected Profiles

System Administrator

Creating Lookup Relationship:

SETUP > OBJECT MANAGER

Customer Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Specify the type of information that the custom field will contain.

Next

Data Type

☐ None Selected

Select one of the data types below.

☐ Auto Number

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☐ Formula

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

☐ Roll-Up Summary

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

☒ Lookup Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

☐ Master-Detail Relationship

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

☐ External Lookup Relationship

☐ Checkbox

Allows users to select a True (checked) or False (unchecked) value.

☐ Currency

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

☐ Date

Allows users to enter a date or pick a date from a popup calendar.

☐ Date/Time

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

SETUP > OBJECT MANAGER

Customer Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Customer Order

New Relationship

Help for this Page

Step 3. Enter the label and name for the lookup field

Step 3 of 6

Previous

Next

Cancel

Field Label

Customer

Field Name

Customer

Description

Help Text

Child Relationship Name

Customer_Orders1

Required

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

☒ Clear the value of this field. You can't choose this option if you make this field required.

☐ Don't allow deletion of the lookup record that's part of a lookup relationship.

☒ Add this field to existing custom report types that contain this entity

Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

[Show Filter Settings](#)

Previous

Next

Cancel

SETUP > OBJECT MANAGER

Customer Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Customer Order

New Relationship

Help for this Page

Step 2. Choose the related object

Step 2

Previous

Next

Cancel

Select the other object to which this object is related.

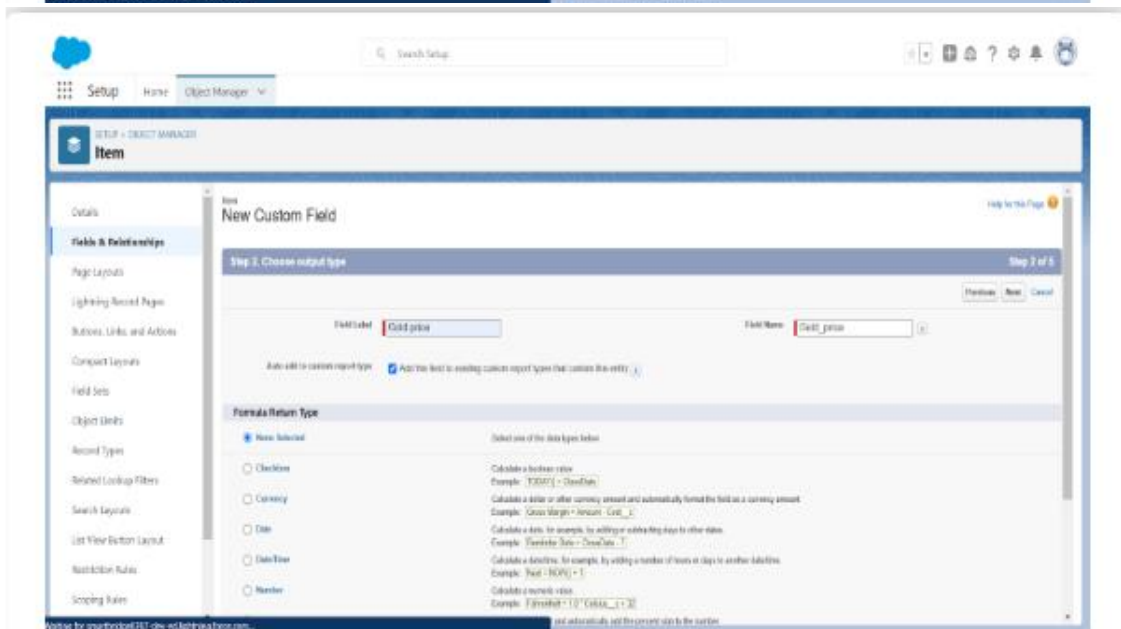
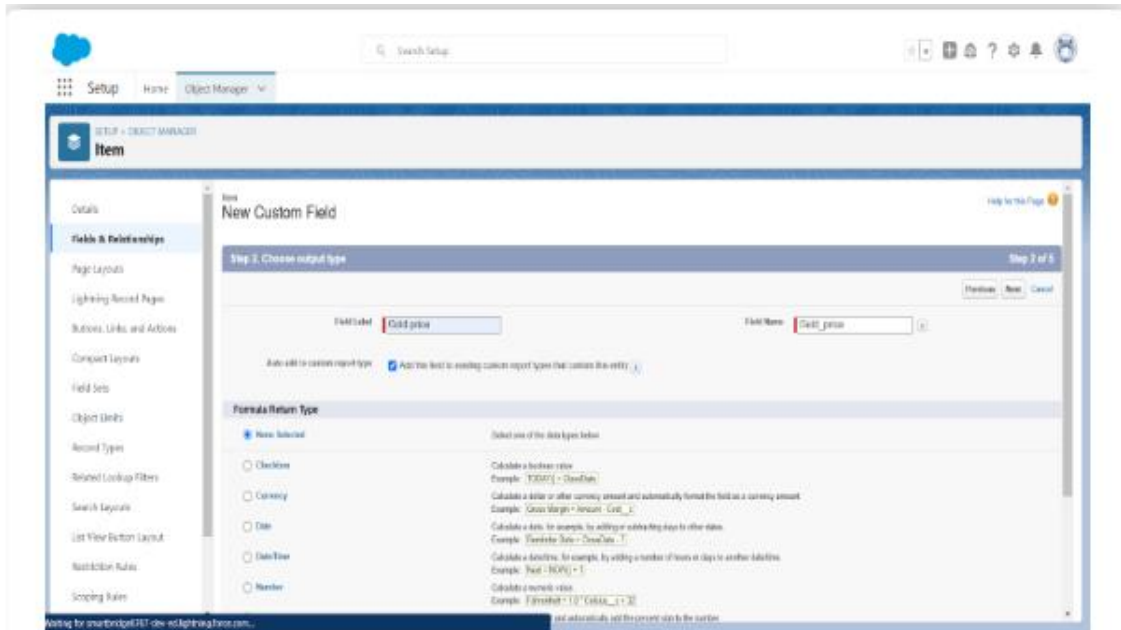
Related To

Jewel Customer

Previous

Next

Cancel



Gold Smith Profile

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile: **System Administrator**

New License Profile Name: **Gold Smith**

[Save](#) [Cancel](#)

	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"/>
Unlocks	<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"/>
Confidants	<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"/>

Users:

User Edit

[Save](#) [Save & New](#) [Cancel](#)

General Information

First Name: **Niklaus**

Last Name: **Mikaelson**

Alias: **nmika**

Email: **snandini1463@gmail.com**

Username: **snandini1463@gmail.com**

Nickname: **nandini**

Title:

Company:

Department:

Division:

Role: **Gold Smith**

User License: **Salesforce**

Profile: **Gold Smith**

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

Data.com User Type: **--None--**

Data.com Monthly Addition Limit: **300**

Accessibility Mode (Classic Only): ☐

High-Contrast Palette on Charts: ☐

Load Lightning Pages While Scrolling: ☒

Debug Mode: ☐

Send Apex Warning Emails: ☐

Make Setup My Default Landing Page: ☐

Quick Access Menu: ☒

Development Mode: ☐

Show View State in Development Mode: ☐

Mailing Address

Country

--None--

Street

City

State/Province

--None--

Zip/Postal Code

Single Sign On Information

Federation ID

Locale Settings

Time Zone

(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)

Locale

English (United States)

Language

English

Approver Settings

Delegated Approver

Manager

Receive Approval Request Emails

Only if I am an approver

☐ Generate new password and notify user immediately

Save

Save & New

Cancel

SETUP

Users

User Edit

Kol Mikaelson

Help for this Page

User Edit

Save

Save & New

Cancel

General Information

First Name

Kol

Last Name

Mikaelson

Alias

kmika

Email

snandini1463@gmail.com

Username

kmika@143.com

Nickname

kol

Title

Company

Department

Division

Role

Worker

User License

Salesforce Platform

Profile

Standard Platform User

Active

☒

Marketing User

☐

Offline User

☐

Knowledge User

☐

Flow User

☐

Service Cloud User

☐

Site.com Contributor User

☐

Site.com Publisher User

☐

WDC User

☐

Data.com User Type

--None--

Data.com Monthly Addition Limit

300

Accessibility Mode (Classic Only)

☐

High-Contrast Palette on Charts

☐

Load Lightning Pages While Scrolling

☒

Debug Mode

☐

Make Setup My Default Landing Page

☐

Salesforce CRM Content User

☒

Receive Salesforce CRM Content Email Alerts

☒

Receive Salesforce CRM Content Alerts as Daily Digest

☒

Mailing Address

Country

--None--

Street

City

State/Province

--None--

Zip/Postal Code

Single Sign On Information

Federation ID

Locale Settings

Time Zone

(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)

Locale

English (United States)

Language

English

Approver Settings

Delegated Approver

Manager

Receive Approval Request Emails

Only if I am an approver

☐ Generate new password and notify user immediately

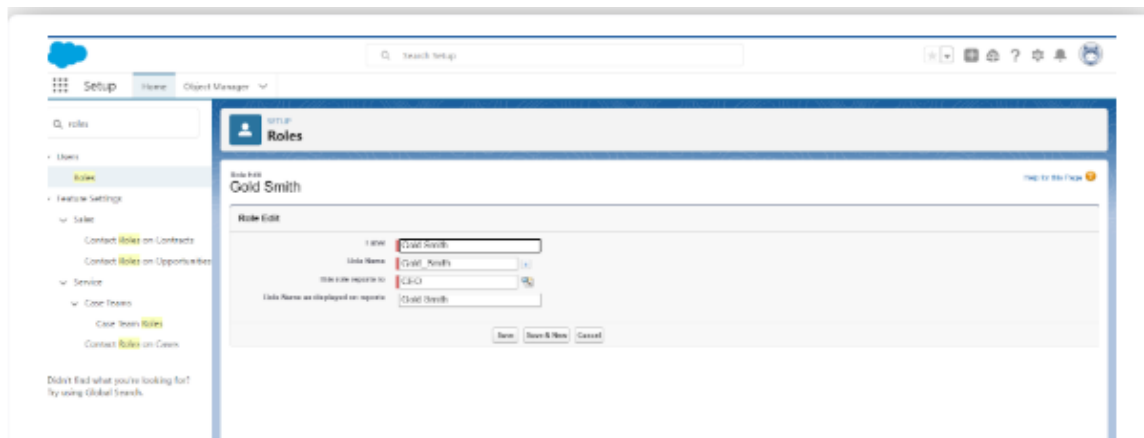
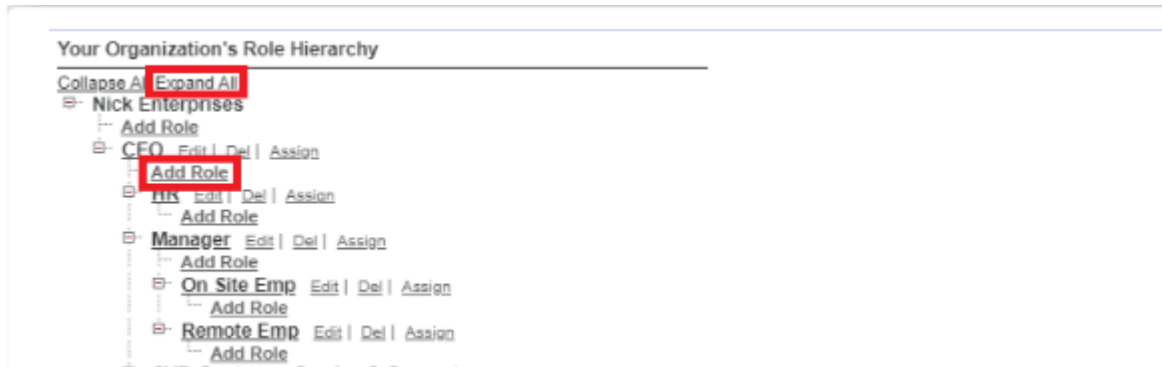
Save

Save & New

Cancel

Roles:

Creating Gold Smith Role



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.

To Create a Gold Page layout

SaveQuick SavePreview As...CancelUndoRedoLayout Properties

Fields

ButtonsQuick ActionsMobile & Lightning ActionsExpanded LookupsRelated ListsReport Charts

Quick FindField Name

SectionExpected Days Of ...OwnerRecord Type

Blank SpaceItem IdPrice

BillingItem TypePriority

Created ByLast Modified ByPurity

Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Item Detail

Standard ButtonsEditDeleteCloneChange OwnerChange Record TypePrintable ViewSharingSharing HierarchyEdit LabelsCustom Buttons

Information (Header visible on edit only)

Item IdGEN-2004-001234

Purity51

Item TypeSample Text

PriceSample Text

BillingSample Text

OwnerSample Text

PrioritySample Text

Expected Days Of ReturnSample Text

System Information (Header visible on edit only)

Created BySample Text

Last Modified BySample Text

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only)

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

Related Lists

To Create a Silver Page layout

SaveQuick SavePreview As...CancelUndoRedoLayout Properties

Fields

ButtonsQuick ActionsMobile & Lightning ActionsExpanded LookupsRelated ListsReport Charts

Quick FindField Name

SectionExpected Days Of ...OwnerRecord Type

Blank SpaceItem IdPrice

BillingItem TypePriority

Created ByLast Modified ByPurity

Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Item Detail

Standard ButtonsEditDeleteCloneChange OwnerChange Record TypePrintable ViewSharingSharing HierarchyEdit LabelsCustom Buttons

Information (Header visible on edit only)

Item IdGEN-2004-001234

Purity95

Item TypeSample Text

PriceSample Text

BillingSample Text

OwnerSample Text

PrioritySample Text

Expected Days Of ReturnSample Text

System Information (Header visible on edit only)

Created BySample Text

Last Modified BySample Text

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only)

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

Related Lists

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.

To create a Record Type

Record Type

Silver

[Back to Custom Object: Item](#)

Help for this Page

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

Edit

Record Type Label	Silver	Active	✓
Record Type Name	Silver		
Namespace Prefix			
Description	Silver items information		
Created By	NANDINI S. 8/31/2025, 11:34 PM	Modified By	NANDINI S. 8/31/2025, 11:34 PM

Picklists Available for Editing

Picklists Available for Editing Help

Action	Field	Modified Date
Edit	Expected Days Of Return	8/31/2025, 11:34 PM
Edit	Item Type	8/31/2025, 11:34 PM
Edit	Priority	8/31/2025, 11:34 PM

Record Type

Gold

[Back to Custom Object: Item](#)

Help for this Page

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

Edit

Record Type Label	Gold	Active	✓
Record Type Name	Gold		
Namespace Prefix			
Description	Gold items information		
Created By	NANDINI S. 8/31/2025, 1:44 PM	Modified By	NANDINI S. 8/31/2025, 1:44 PM

Picklists Available for Editing

Picklists Available for Editing Help

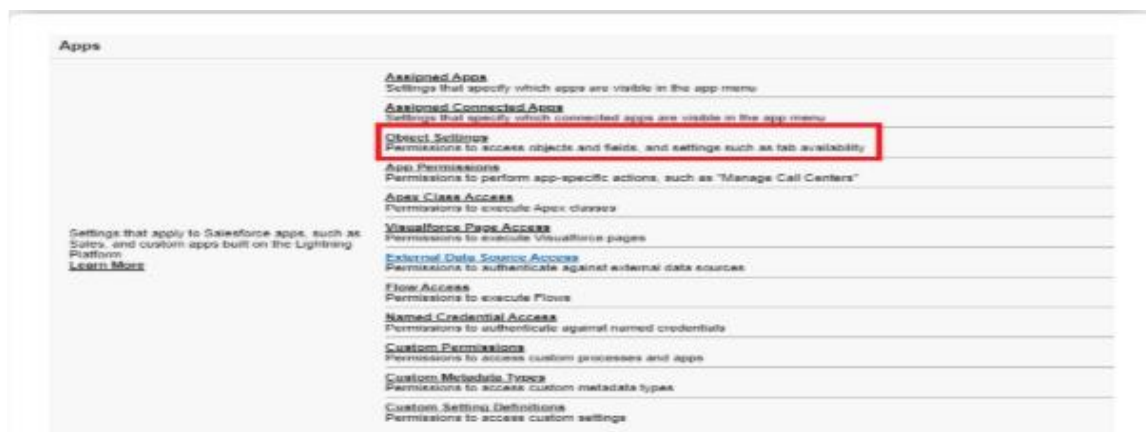
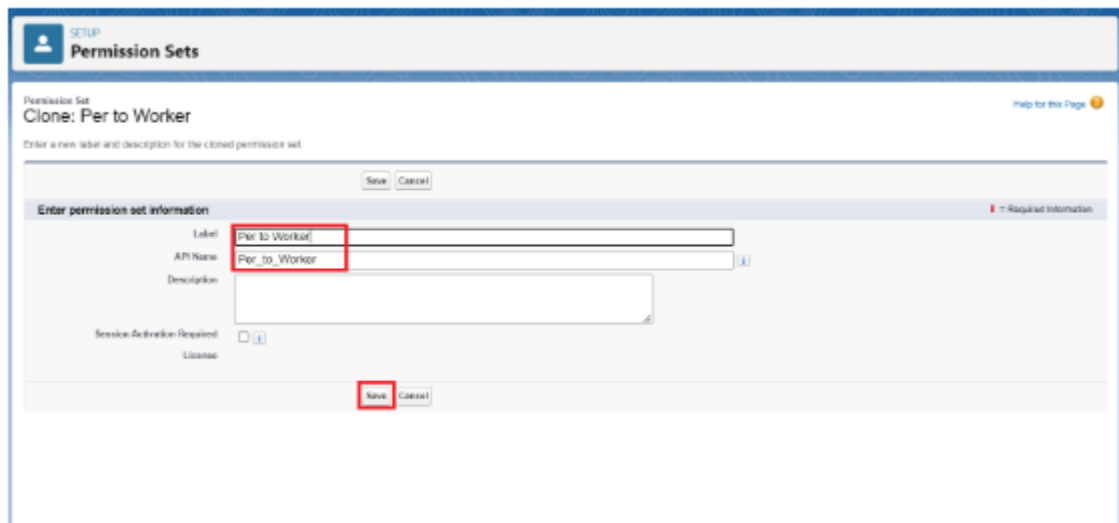
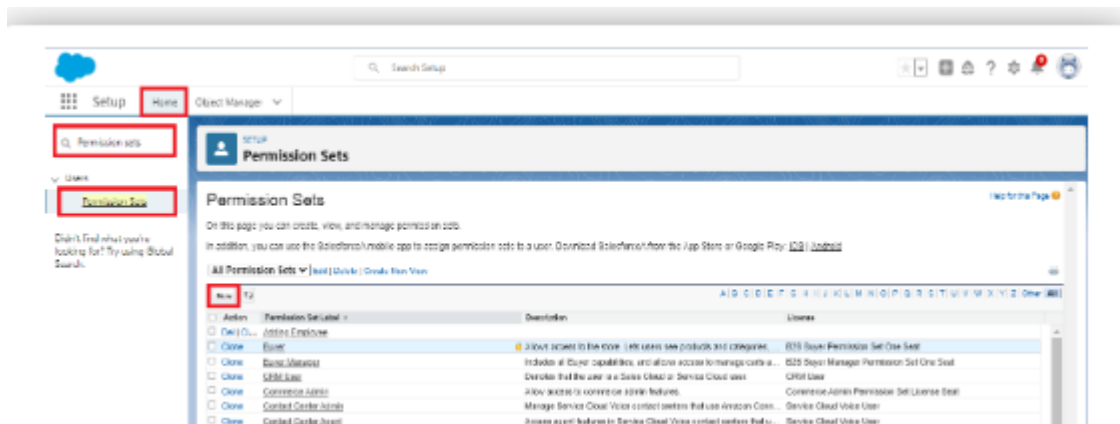
Action	Field	Modified Date
Edit	Expected Days Of Return	8/31/2025, 1:44 PM
Edit	Item Type	8/31/2025, 1:44 PM
Edit	Priority	8/31/2025, 1:44 PM

Permission sets

A standard permission set consists of a group of common permissions for a particular feature associated with a permission set licence.


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.




User Adoption







Create a Record (Jewel Customer)













Jewel Customers

Recently Viewed 

[New](#)
[Import](#)
[Change Owner](#)
[Assign Label](#)

9 items • Updated a few seconds ago

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

Reports

Report: Prices

Price Report

Field Editing Enabled

Add Chart

Edit

Total Records

1

	Price: ID	Price: Price Name
1	a03gL00000E1N1N	9000

Dashboards

New Dashboard

* Name

dashboard 2

Description

jewel

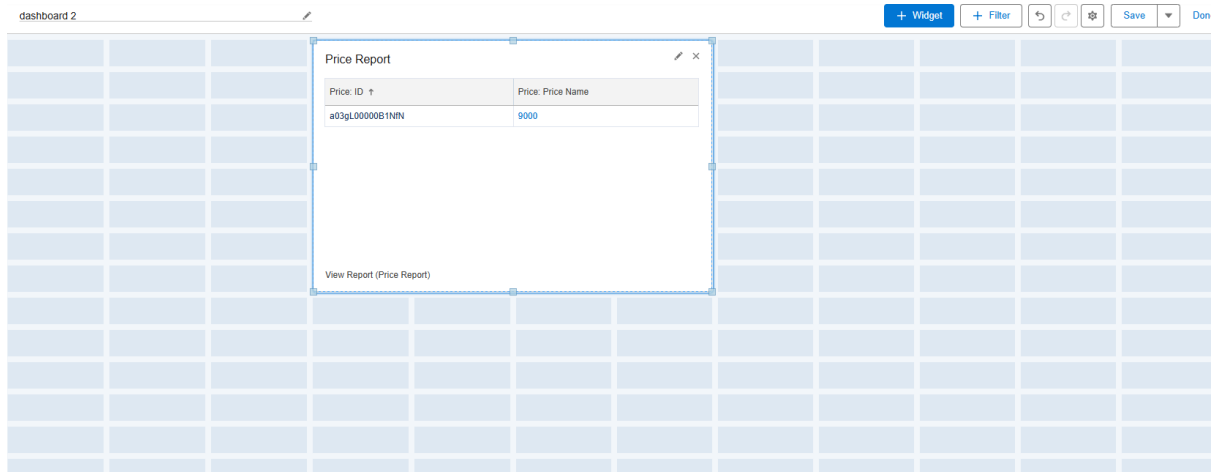
Folder

Private Dashboards

Select Folder

Cancel

Create



Flows

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.

