

RM Application for Jewel Management - (Admin)

Description:

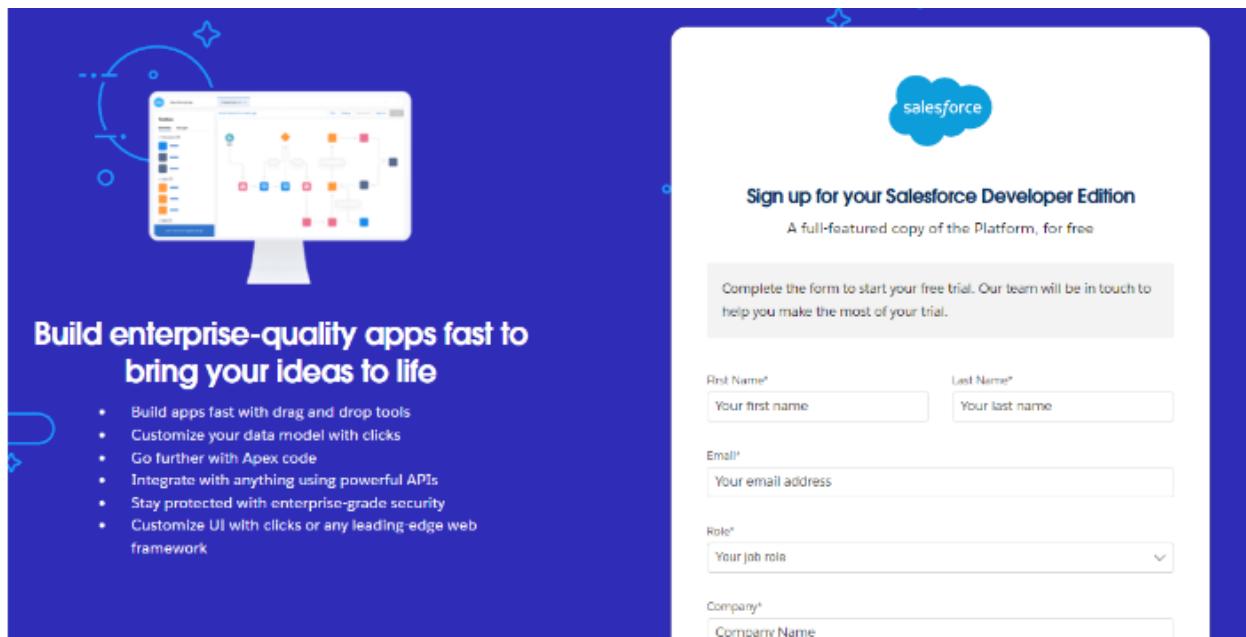
The **CRM Application for Jewel Management (Admin)** in Salesforce is a comprehensive solution tailored for jewelry businesses to streamline their operations more effectively. This application allows administrators to have full control over the platform, allowing you to oversee everything from inventory and customer data to sales, transactions, and services. Admins can manage **customer profiles**, keeping records of preferences, purchase history, and communications, enabling more personalized services. Admins can also customize the system to meet specific business needs, assign roles and permissions to staff, and create visual reports through dashboards to track sales performance and trends. This centralized tool helps improve operational efficiency, ensures customer satisfaction, and drives growth, making it an ideal solution for businesses in the jewelry sector.

Tasks:

1. Salesforce

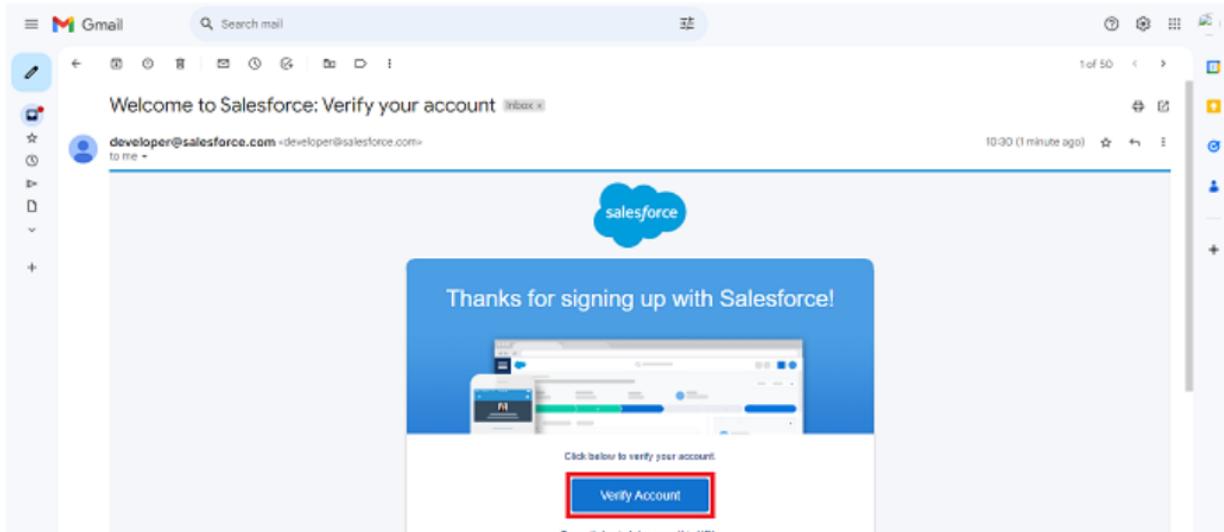
1.1 Creating Developer Account

- Creating a developer org in salesforce.
- Go to <https://developer.salesforce.com/signup> and fill the details.

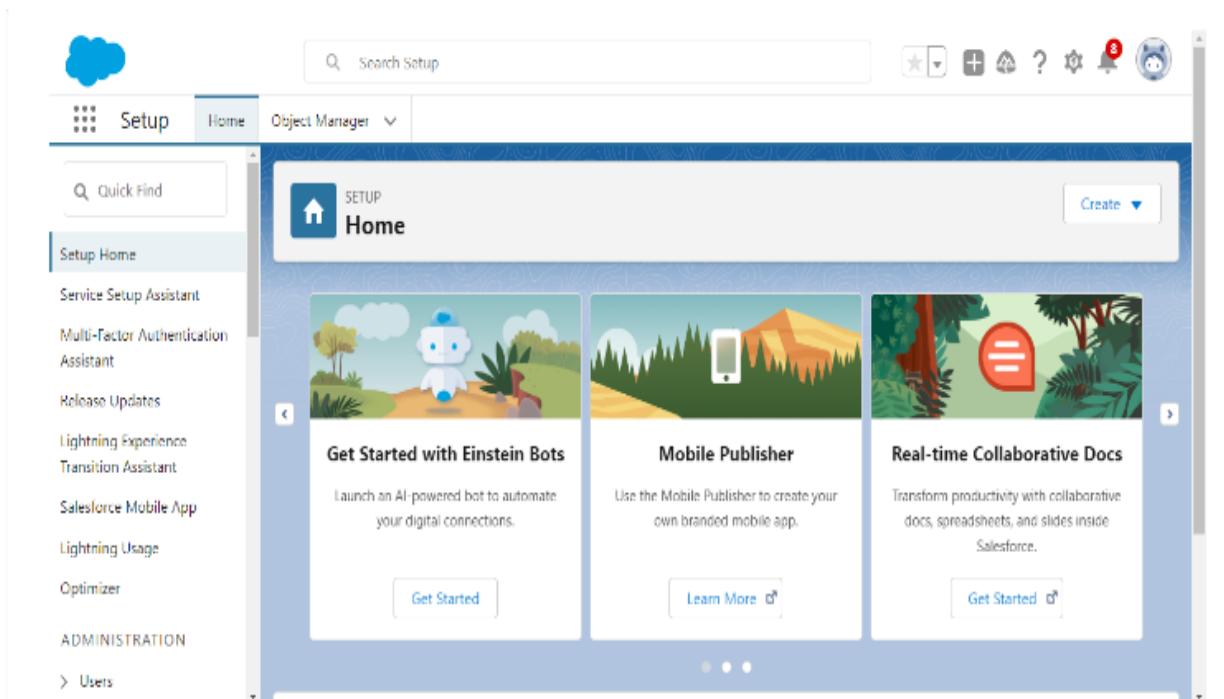


1.2 Account Activation

- Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10 mins.
- Click on Verify Account.
- Give a password and answer a security question and click on change password.



- Then you will redirect to your salesforce setup page.

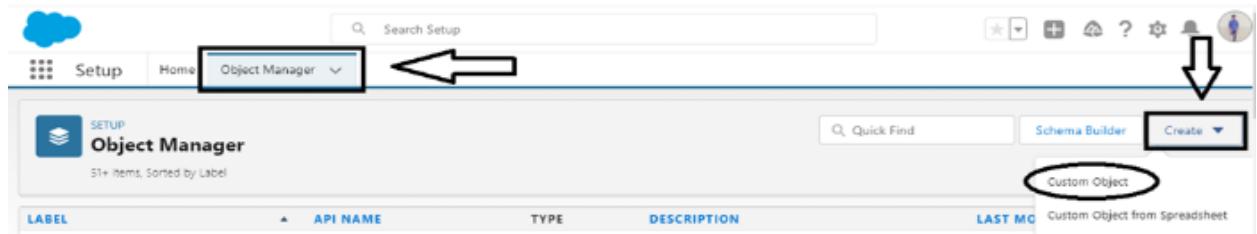


2.Objects

2.1 Create Jewel Customer Object

To create an object:

- 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.
- Enter Record Name, Label, and Format.
- Record Name --> Customer name.
- Data Type --> Text.
- Click on Allow reports.
- Allow search --> Save.

2.2 Create Item 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
- Record Name >> Item Id
- Data Type >> Auto Number
- Display Format >> Item-{00}
- Starting Number >> 1
- Click on Allow reports.
- Allow search >> Save.

We need to create 3 more objects with label names as Customer Order, Price, Billing.

(Note: Here use Data Type as "Auto Number")

3. Tabs

3.1 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 with the following details:

- Custom Object Tabs:** A page titled "Custom Object Tabs" with a "New" button highlighted by a red box. Below it, a message says "No Custom Object Tabs have been defined".
- Web Tabs:** A page titled "Web Tabs" with a "New" button highlighted by a red box. Below it, a message says "No Web Tabs have been defined".
- New Custom Object Tab:** A detailed view of the "Tabs" setup screen. It shows the "Setup" header with "Home" and "Object Manager" options. The left sidebar has "User Interface" expanded, with "Tabs" selected. The main area is titled "New Custom Object Tab" and "Step 1. Enter the Details".
 - Object:** A dropdown menu where "Jewel Customer" is selected, while "None" is also listed.
 - Tab Style:** A dropdown menu where "Jewel Customer" is selected, while "None" is also listed.
 - (Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab:** A dropdown menu showing "None".
 - Description:** A text input field containing the placeholder "Enter a short description".

3.2 To create a Tab:(Item)

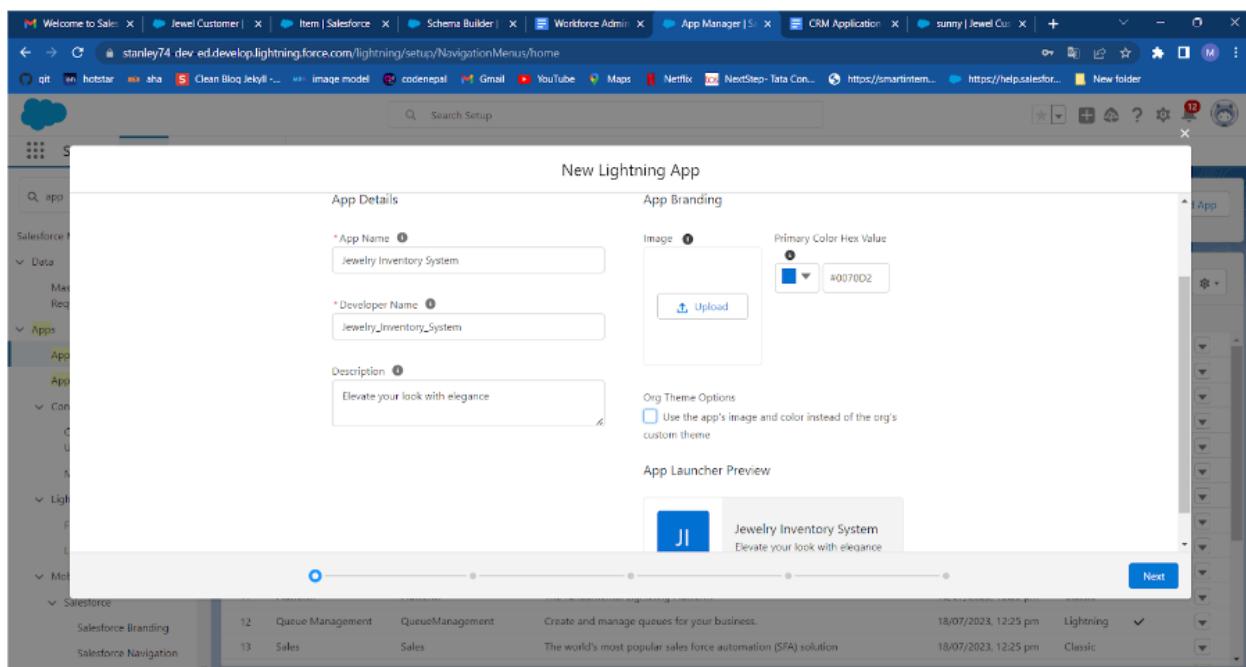
- Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New(under custom object tab)
- Select Object(Item) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) keep it as default >> Save.
- Note: Now create tabs for Customer Order, Price, Billing objects.

4. The Lighting App

4.1 Create a 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.
- Fill the app name in app details and branding as follow
 - App Name : Jewelry Inventory System.
 - Developer Name : This will auto populated
 - Description : Elevate your look with elegance
 - Image : optional (if you want to give any image you can otherwise not mandatory)
 - Primary color 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:

The screenshot shows the 'Navigation Items' section of the Lightning App Builder. On the left, there's a sidebar with 'App Settings' and 'Navigation Items' selected. The main area has two lists: 'Available Items' on the left and 'Selected Items' on the right. The 'Available Items' list contains various Salesforce objects like Accounts, Alert Settings, and Asset Services. The 'Selected Items' list contains specific items: Jewel Customers, Items, Customer Orders, Prices, Billings, Reports, and Dashboards. A search bar at the top of the available items list allows filtering.

- 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.
- To Add User Profiles:

The screenshot shows the 'User Profiles' configuration screen. It has two sections: 'Available Profiles' on the left and 'Selected Profiles' on the right. In the 'Available Profiles' section, 'System administrator' is listed and highlighted with a red box. An 'X' icon is to its right, with a red arrow pointing to it. Below the list is a search bar. Between the two sections is a right-pointing arrow. At the bottom right of the screen is a 'Save & Finish' button, which is also highlighted with a red box. A progress bar at the bottom indicates the process is nearly complete.

5.Fields

5.1 Creating Lookup Relationship

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.

5.2 Creating a Master-Detail Relationship

To Create a Master-Detail relationship :

- 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 & relationships >> click on New.
- Select “Master-Detail relationship” as data type and click Next.
- Select the related object “Item”.
- Give Field Label as “Item” and click Next.
- Next >> Next >> Save.

5.3 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.

The screenshot shows the Salesforce Object Manager. At the top, there's a search bar with 'jewel' typed into it. Below the search bar, the 'Object Manager' tab is selected. A red arrow points to the 'jewel' search result in the list. Another red arrow points to the 'Label' column where 'Jewel Customer' is listed. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The first row shows 'Jewel Customer' with an API name of 'Jewel_Customer__c', a type of 'Custom Object', and a last modified date of '7/18/2023'. The 'DEPLOYED' column contains a checkmark.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Jewel Customer	Jewel_Customer__c	Custom Object		7/18/2023	✓

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. Under 'Jewel Customer', the 'Fields & Relationships' section is active. At the top right of the list view, there is a 'New' button, which is highlighted with a red arrow. The list contains several fields: Country, Country__c, Text(18), Created By, CreatedById, Lookup(Used), and Customer Name, Name, Text(18).

- Select Data type as “Text”.

This screenshot shows the 'Data Types' selection screen. It lists several options with descriptions:

- Picklist: Allows users to select a value from a list you define.
- Picklist (Multi-Select): Allows users to select multiple values from a list you define.
- Text: Allows users to enter any combination of letters and numbers. This option is highlighted with a red box.
- Text Area: Allows users to enter up to 255 characters on separate lines.
- Text Area (Long): Allows users to enter up to 131,072 characters on separate lines.

- Click on Next.

The screenshot shows the 'Step 2: Enter the details' page for creating a new custom field. The 'Field Label' is set to 'City', 'Length' is set to 20, and 'Field Name' is set to 'City'. These three fields are all highlighted with red boxes. The page also includes a note about maximum length for text fields and navigation buttons for 'Previous', 'Next', and 'Cancel'.

- Fill the above as following:
- Field Label: City
- Length : 20
- Field Name : gets auto generated
- Click on Next >> Next >> Save and new.

5.4 Creating the Phone field in object Jewel Customer

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
- Select Data type as “Phone” and click Next.
- Given the Field Label as “ Phone”.
- Field Name will be auto populated, and click on Next >> Next >> Save & new.

5.5 Creating the Email field in object Jewel Customer

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
- 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.

5.6 Creating the number field in Item object

To create fields in an object:

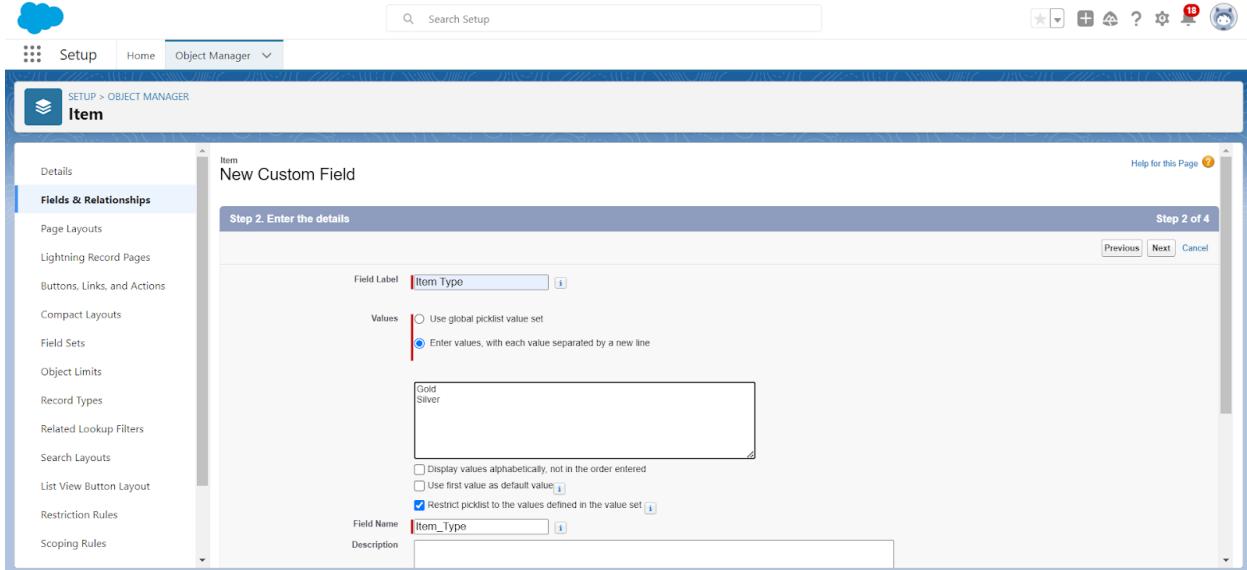
- Go to setup >> click on Object Manager >> type object name(Item) in quick find bar >> click on the object.
- Now click on “Fields & Relationships” >> New
- Select Data type as “Number” and click Next.
- Given the Field Label as “ Purity” and length as “ 2 ”.
- Field Name will be auto populated, and click on Next >> Next >> Save.

5.7 Creating Picklist Field in Item Object

To create fields in an 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.



- Click Next >> Next >> Next >> Save .

5.8 Creating Currency Field in Price Object

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

5.9 Creating Formula Field(Cross Object) in Item Object

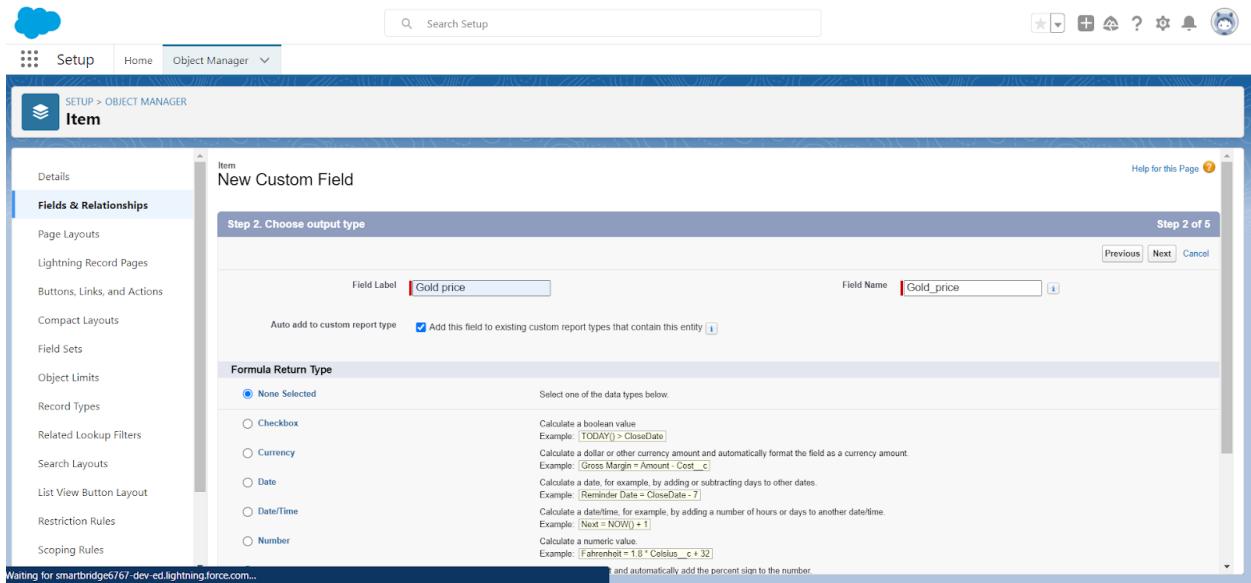
To create fields in an object:

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

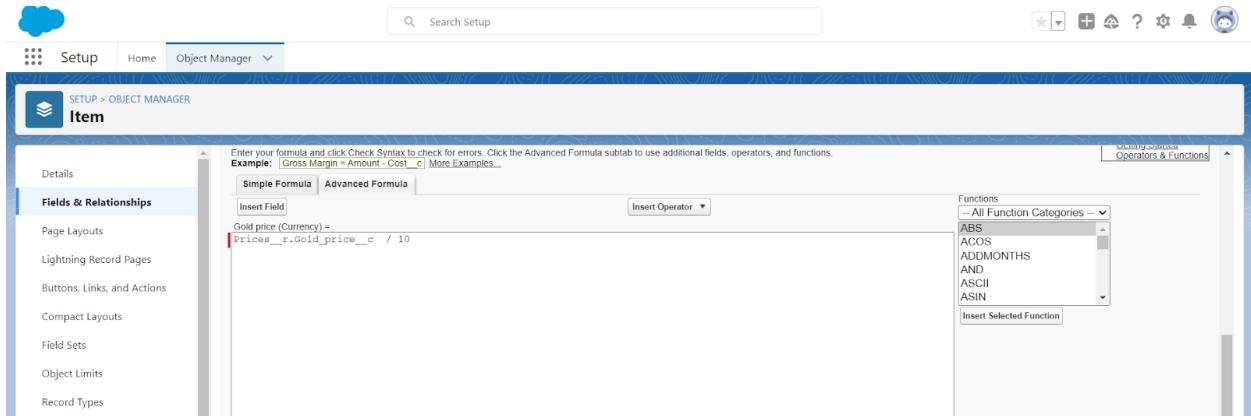
- 1. Go to setup >> click on Object Manager >> type object name(Item) in quick find

bar >> click on the object.

- 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.



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



- click “Check Syntax” and Next >> Next >> Save & New.

5.10 Creating Remaining Fields in Objects

- Now create the remaining fields using the data types mentioned.
- Note: Similarly create Fields for Jewel Customer, Price, Item, Billing, Customer Order Objects as shown in the above images provided .
- 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.

Jewel Customer		
1	Field Name	Data type
	State	Text(20)
	Street	Text(20)
	Country	Text(18)
	Zip/Postal code	Text(6)

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

3	Item	Field Label:Customer Name	Lookup Relationship with Jewel Customer Object
		Ornament	Text(20)
		Weight	Number (Length=8,Decimal=5)
		Stone Weight	Number (Length=5,Decimal=5)
		Percentage	Number (Length=2,Decimal=0)
		Stone/Other Price	Currency (Length=8,Decimal=2)
		Expected Days Of Return	Picklist 1-3 Days 4-5 Days 6-7 Days 8-10 Days
		Priority	Picklist Low Medium High Critical

Silver Price	Formula (Return Type:Number) (Decimal=3)
	$(Prices_r.Silver_price_c / 1000)$
Purity Gold Price	Formula (Return Type:Currency) (Decimal=2)
	$((Prices_r.Gold_price_c * Purity_c) / 24) / 10$
Total Weight	Formula (Return Type:Number) (Decimal=3)
	$(Weight_c - Stone_weight_c)$
Amount	Formula (Return Type:Currency) (Decimal=3)
	$IF(ISPICKVAL(Item_Type_c, "Gold"), Total_weight_c * Purity_Gold_price_c, Total_weight_c * Silver_price_c)$
KDM	Formula (Return Type:Currency) (Decimal=0)

		(Amount__c * Percentage__c) / 100
	Making Charges	Formula (Return Type:Currency) (Decimal=0)
		IF(ISPICKVAL(Item_Type__c , "Gold"), Weight__c * 300 , Weight__c * 10)
4	Customer Order	
	Order Status	Picklist
		Started Not Started On Hold Completed Not Completed
5	Billing	
	Field Label:Item	Lookup Relationship with Item Object
	Ornament	Formula (Return Type:Text)
		Item__r.Ornament__c

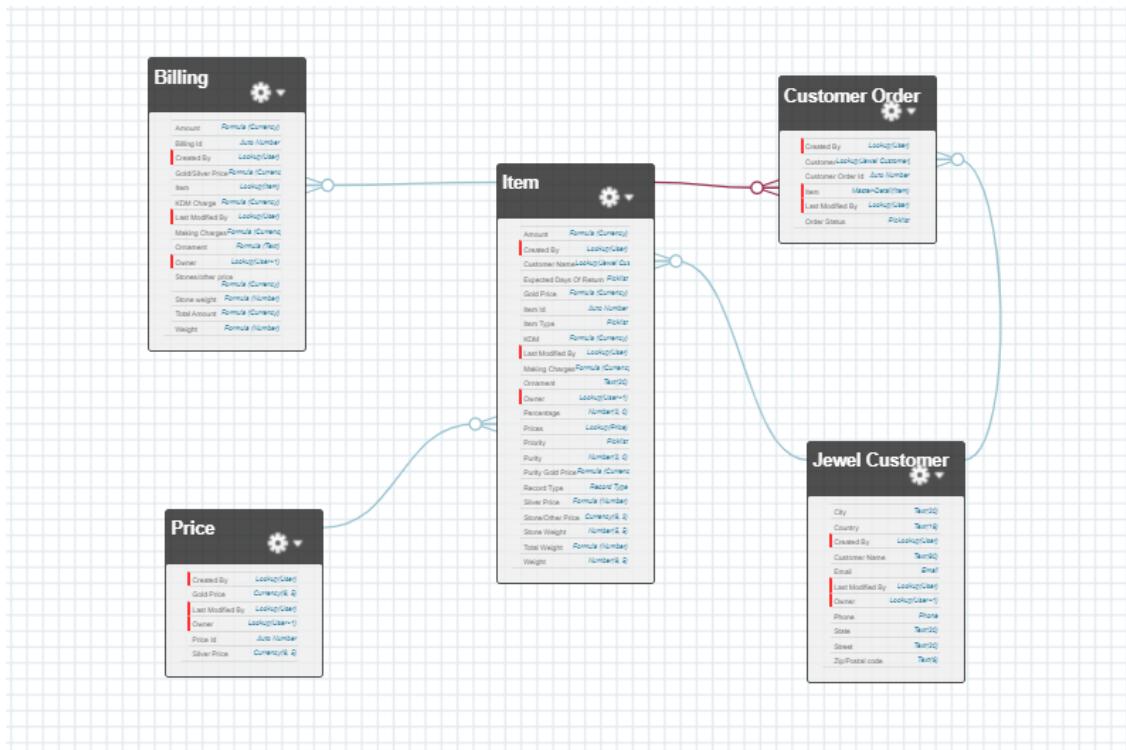
Stone weight	Formula (Return Type:Number) (Decimal=2)
	Item__r.Stone_weight__c
Weight	Formula Return Type:Number (Decimal=2)
	Item__r.Total_weight__c
Amount	Formula (Return Type:Currency) (Decimal=2)
	Item__r.Amount__c
Gold/Silver Price	Formula (Return Type:Currency) (Decimal=2) IF(ISPICKVAL(Item__r.Item_Type__c , "Gold"), Item__r.Gold_price__c , Item__r.Silver_price__c)
KDM Charge	Formula (Return Type:Currency) (Decimal=0)
	Item__r.KDM__c
Making Charges	Formula (Return Type:Currency) (Decimal=2)
	Item__r.Making_Charges__c

Stones/other price (Return Type:Currency) (Decimal=2) Item__r.Stone_other_price__c	Formula (Return Type:Currency) (Decimal=0) Amount_c + KDM_Charge_c + Stones_other_price_c + Making_Charges_c
Total Amount (Return Type:Currency) (Decimal=0)	Formula (Return Type:Currency) (Decimal=0) Amount_c + KDM_Charge_c + Stones_other_price_c + Making_Charges_c

5.11 Schema Builder

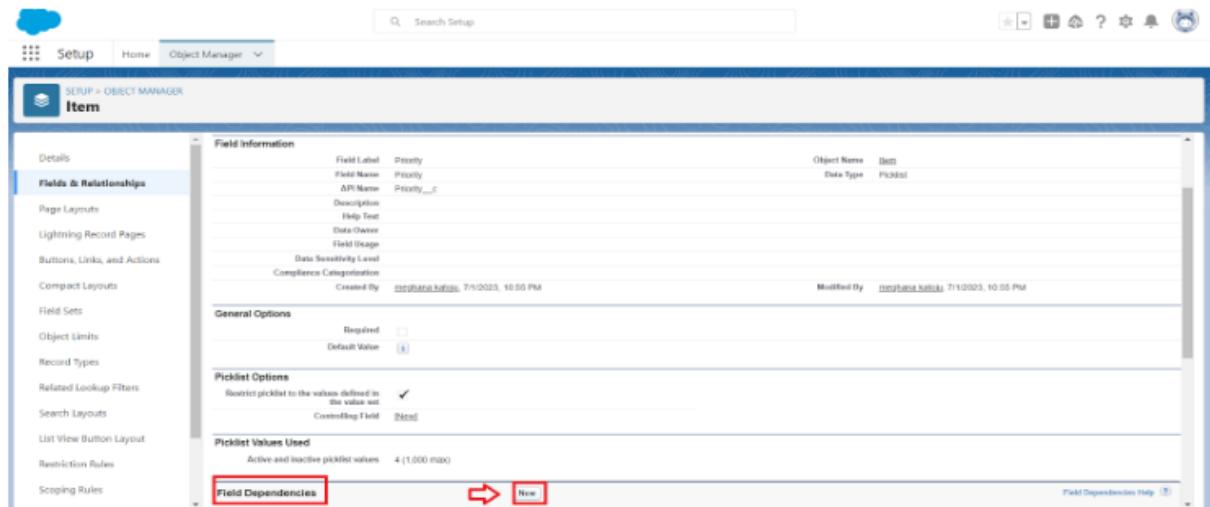
Creating Schema Builder

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

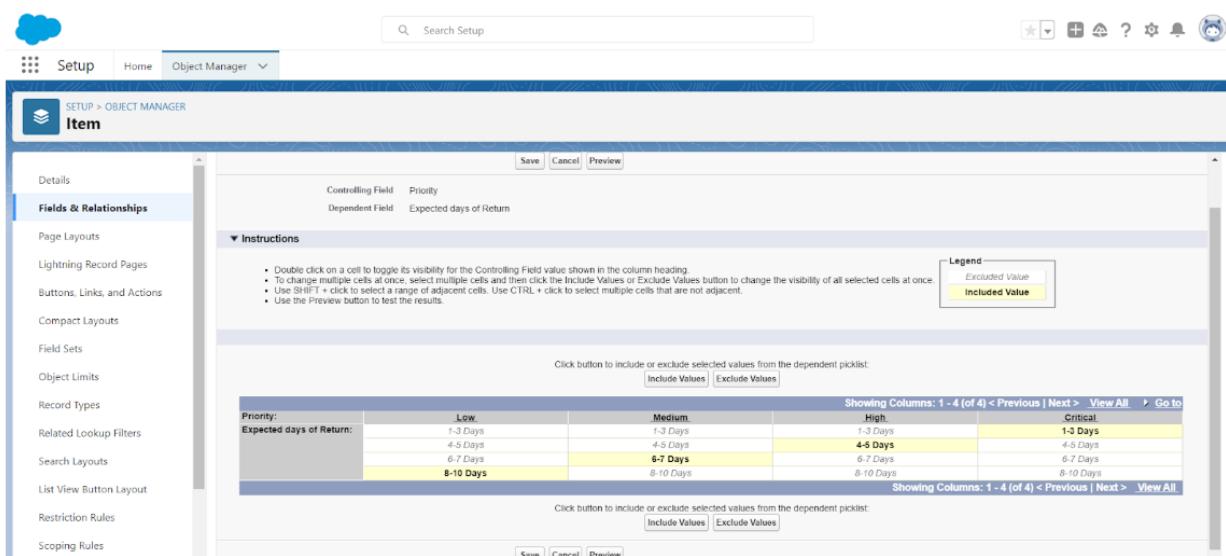


5.12 Creating the Field Dependencies

- 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.

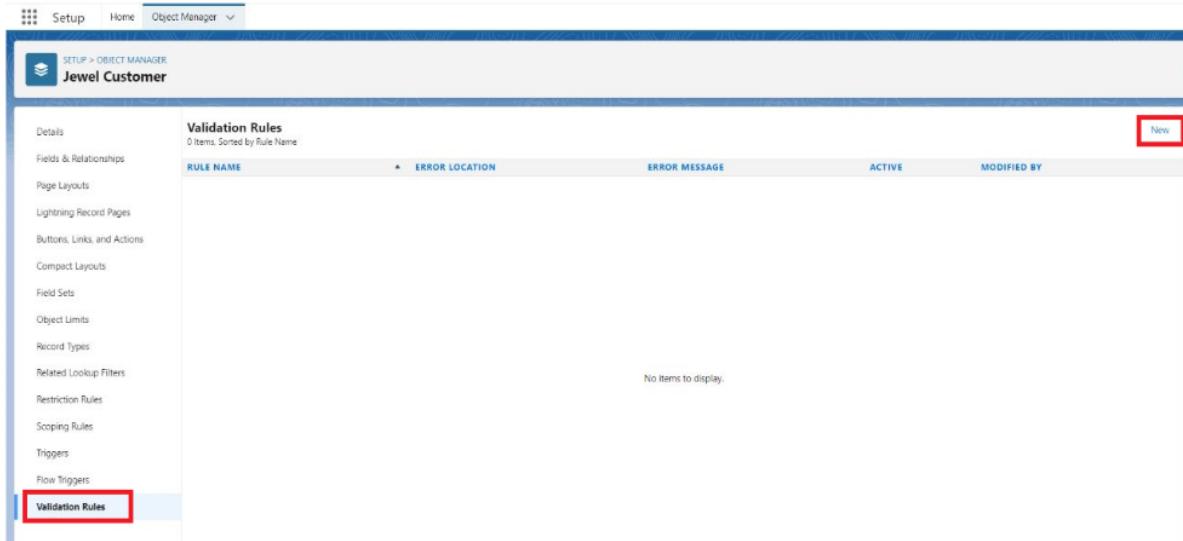


5.13 Creating the validation rule

Creating the validation rule for Postal Code field in Jewel Customer object

Note : check whether the fields mentioned in the formula field are created or not , if not go to activity 10 and create those fields mentioned in Jewel Customer object.

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

The screenshot shows the 'Validation Rule Edit' screen for the 'Jewel Customer' object. The 'Rule Name' is 'Postal Code'. The 'Error Condition Formula' is set to check if the 'Zip_Postal_code__c' field is not blank and contains exactly 6 digits. The 'Error Message' is 'Must contain 6 digits'. The 'Error Location' is set to 'Field' with 'Zip/Postal code' selected.

- 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.

NOTE:

- Create One more Validation rule for Jewel Customer object.
- Enter Rule name as "ValidationRule For JewelCustomerObject".
- Insert the Error Condition Formula as : -
OR(ISBLANK(City__c), ISBLANK(Country__c),ISBLANK(Phone__c),ISBLANK(State__c),ISBLANK(Street__c))
- Enter the Error Message as "Please fill Required fields", select the Error location as Top of Page and click Save.
- Create Validation rule for Item object.
- Enter Rule name as "ValidationRule For Item".
- Insert the Error Condition Formula as : -
OR(ISBLANK(Amount__c), ISBLANK(Customer_Name__c),ISBLANK(Gold_price__c),ISBLANK(KDM__c),ISBLANK(Ornament__c),ISBLANK(Percentage__c),ISBLANK(Making_Charges__c),ISBLANK(Prices__c),ISBLANK(Stone_weight__c),ISBLANK(Silver_price__c),ISBLANK(Stone_other_price__c)

),ISBLANK(Stone_weight__c),ISBLANK(Weight__c))

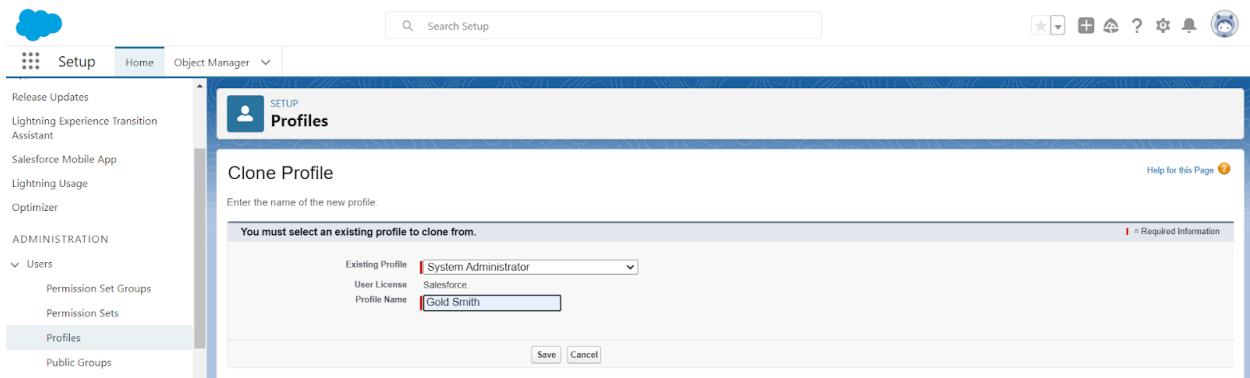
- Enter the Error Message as “Please fill Required fields”, select the Error location as Top of Page and click Save.

6.Profiles

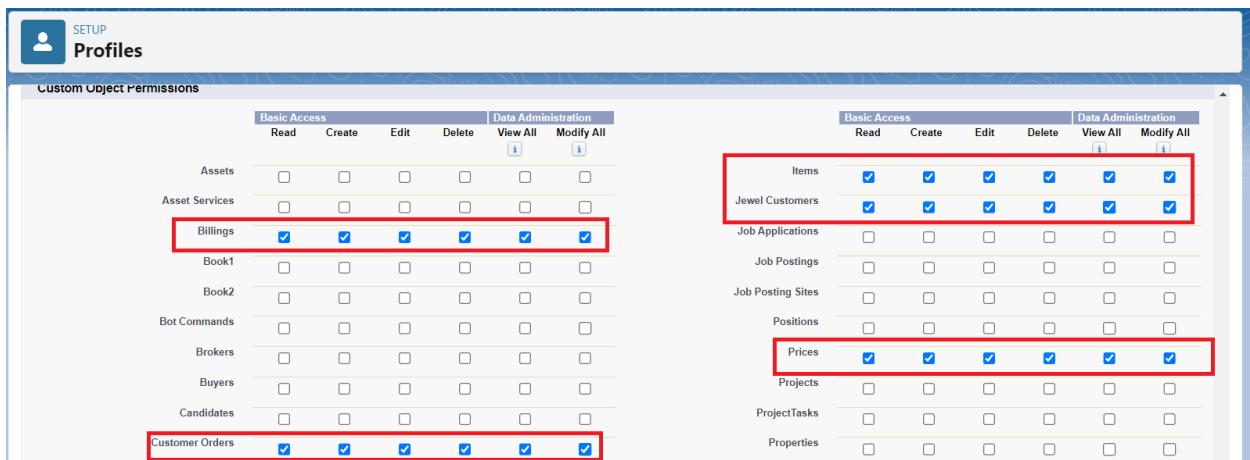
6.1 Gold Smith Profile

To create a new 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.



- 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 .



- Scroll down and Click on Save.

6.2 Worker Profile

- Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Salesforce Platform User) >> enter profile name as worker profile >> Save.
- 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.

7.Roles

7.1 Creating Gold Smith Role

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

The screenshot shows the 'Roles' page in the Salesforce Setup. The left sidebar has 'Roles' selected. The main area is titled 'Understanding Roles' and shows a 'Territory-based Sample' role hierarchy diagram. The hierarchy is as follows:

- Executive Staff
 - CEO, President, CFO, VP, Sales
 - Western Sales Director
 - Western Sales Rep (CA Sales Rep, Off Sales Rep)
 - Eastern Sales Director
 - Eastern Sales Rep (NY Sales Rep, MA Sales Rep)
 - International Sales Director
 - International Sales Rep (Asia Sales Rep, Europe Sales Rep)

A note on the right side of the diagram states:
* View & edit data, roll up forecasts, & generate reports for all users below this level.
* Can't access data for users above or at same level.

At the bottom right, there is a 'Set Up Roles' button and a checkbox for 'Don't show this page again'.

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

The screenshot shows the 'Your Organization's Role Hierarchy' page. The hierarchy is expanded to show multiple levels of roles. The 'Add Role' button is highlighted in red for each level.

- Nick Enterprises
 - Add Role
 - CFO
 - Edit | Del | Assign
 - Add Role
 - HR
 - Edit | Del | Assign
 - Add Role
 - Manager
 - Edit | Del | Assign
 - Add Role
 - On Site Emp
 - Edit | Del | Assign
 - Add Role
 - Remote Emp
 - Edit | Del | Assign
 - Add Role

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

The screenshot shows the Salesforce Setup interface under the 'Roles' section. On the left, there's a sidebar with navigation links like 'Users', 'Sales', 'Service', and 'Case Teams'. The main area is titled 'Role Edit' for 'Gold Smith'. It has fields for 'Label' (set to 'Gold Smith'), 'Role Name' (set to 'Gold_Smith'), 'This role reports to' (set to 'CEO'), and 'Role Name as displayed on reports' (set to 'Gold Smith'). At the bottom are 'Save', 'Save & New', and 'Cancel' buttons. A status message at the bottom left says 'Didn't find what you're looking for? Try using Global Search.'

Note:

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

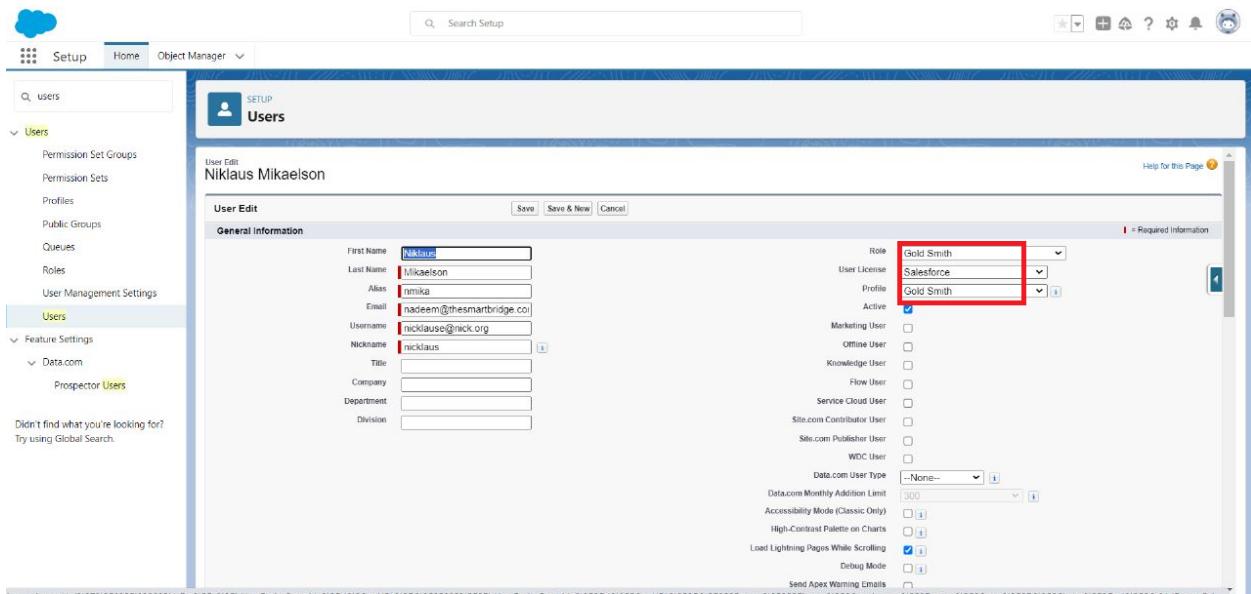
The screenshot shows the 'Your Organization's Role Hierarchy' page. It displays a tree structure of roles under 'Meghana'. The hierarchy includes 'CEO', 'CFO', 'COO', 'Gold Smith' (which has a 'Worker' child role), 'HR', 'Manager', 'SVP_Customer_Service & Support', and 'SVP_Human_Resources'. Each node has 'Edit', 'Del', and 'Assign' buttons. A 'Show in tree view' dropdown is visible on the right.

8.Users

8.1 Create User

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

- 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 Nickname
- Role : Gold Smith
- User license : Salesforce
- Profiles : Gold Smith
- Save.



8.2 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 Nickname
- Role : Worker

- User license : Salesforce Platform
- Profiles : Worker
- Save.

Note:

Create two more users as mentioned in activity 2 using the same profile.

9.Page layouts

9.1 To Create a Gold Page layout

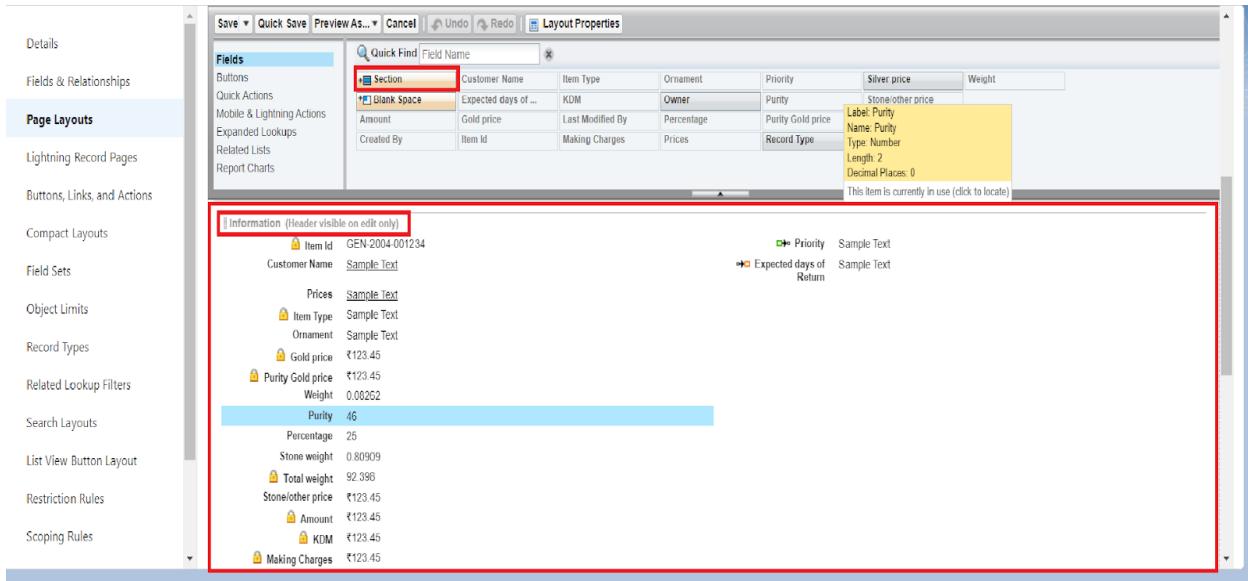
- Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.
- Click on Page layout >> Click on New.

The screenshot shows the 'Object Manager' page for the 'Item' object. The left sidebar has tabs for 'Details', 'Fields & Relationships', 'Page Layouts' (which is selected and highlighted in blue), and 'Lightning Record Pages'. The main area is titled 'Page Layouts' and shows one item: 'Item Layout' created by 'meghana katoju' on 6/29/2023 at 10:48 PM, last modified by 'meghana katoju' on 7/18/2023 at 11:45 AM. At the top right of this section, there is a 'Quick Find' search bar and a 'New' button, which is highlighted with a red box.

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

The screenshot shows the 'Create New Page Layout' page. The left sidebar has tabs for 'Details', 'Fields & Relationships', 'Page Layouts' (selected), 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', and 'Field Sets'. The main area has a title 'Create New Page Layout' and a note: 'As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names are translated for your international users.' Below this, there is a dropdown 'Existing Page Layout' set to 'Item Layout' and an input field 'Page Layout Name' containing 'Page Layout for Gold'. At the bottom are 'Save' and 'Cancel' buttons.

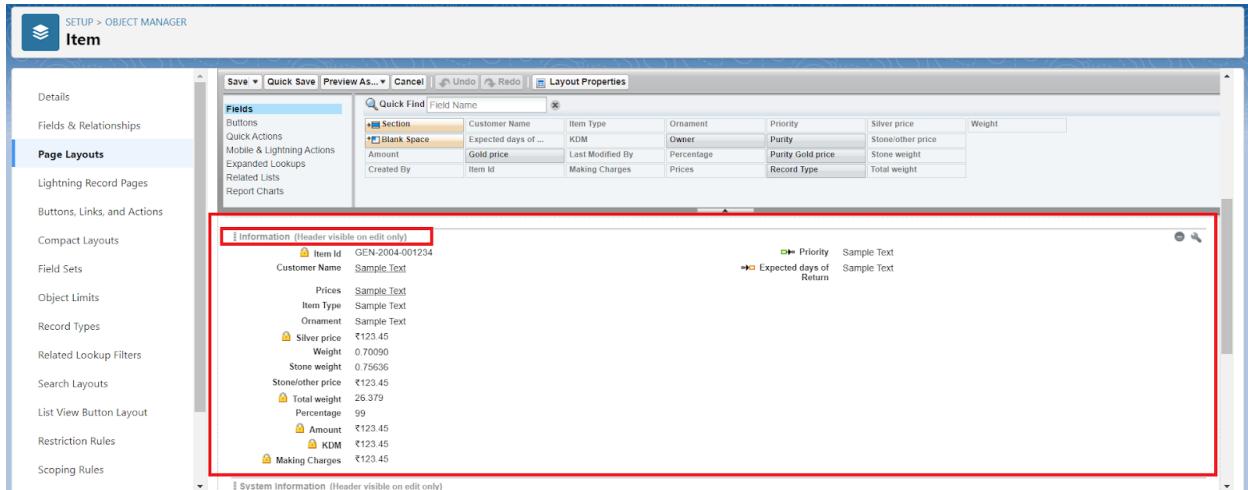
- Arrange the field as shown in the Information Section ,remove fields which are related to Silver and click Ok.



- Click Save.
- Make sure your page layout looks like the picture above.

9.2 To Create a Silver Page layout

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



10 Record Types

10.1 To create a Record Type

- Go to setup >> click on Object Manager >> type object name(Item) in quick find bar >> click on the object.
- Click on the Record Types >> click New

The screenshot shows the Salesforce Object Manager for the 'Item' object. On the left, a sidebar lists various settings like Details, Fields & Relationships, Page Layouts, etc., with 'Record Types' highlighted and a red arrow pointing to it. The main area displays a table titled 'Record Types' with two items: 'Gold' and 'Silver'. The 'Gold' record has a description 'Gold items information' and was modified by 'meghana katoju' on 7/18/2023, 11:45 AM. The 'Silver' record has a similar description and modification details. A 'Quick Find' bar at the top right contains fields for 'Q', 'Quick Find', 'New', and 'Page Layout Assignment'.

- Select Existing Record as "Master", Record type Label as "Gold", Description as "Gold items information".

The screenshot shows the 'Edit Record Type' dialog for the 'Gold' record. The dialog title is 'Edit Record Type Gold'. It contains fields for 'Record Type Label' (set to 'Gold'), 'Record Type Name' (set to 'Gold'), 'Namespace Prefix' (empty), 'Description' (set to 'Gold items information'), and 'Active' (checkbox checked). A note at the top says 'Enter a new name for the selected record type and click Save.' A red box highlights the entire dialog area. A help link 'Help for this Page' is visible in the top right corner.

- Uncheck for "Make Available".

The screenshot shows the 'Profile Name' page with a table titled 'Record Types Currently Available'. The table lists profiles: 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Chatter External User', and 'Chatter Free User'. For each profile, there are two checkboxes: 'Make Available' (unchecked) and 'Make Default' (unchecked). A red box highlights the 'Make Available' checkbox for the first profile.

- Scroll down and check for the Gold Smith,Worker & System Administrator profile and click on Next.
- 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.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The left sidebar lists various setup categories, and the main area displays a table of record types. The 'Record Types' category is currently selected. A red box highlights the 'Gold smith' record type, which is set to 'Gold (Default), Silver'. Another red box highlights three other record types: 'J Worker1', 'J Worker2', and 'J WORKER3', all of which are also set to 'Gold (Default), Silver'.

Record Type	Page Layout
Gold smith	Gold (Default), Silver
J Worker1	Gold (Default), Silver
J Worker2	Gold (Default), Silver
J WORKER3	Gold (Default), Silver
Manager	Gold (Default), Silver
Marketing User	Gold (Default), Silver
Minimum Access - Salesforce	Gold (Default), Silver
Partner, Ann Subscription User	Gold (Default), Silver

- Note: Create another Record Type with name “Silver” following the steps from Activity1(Use page layout for Silver).

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 ▾
Silver Partner User	Item Layout ▾
Solution Manager	Item Layout ▾
Standard Platform User	Item Layout ▾
Standard User	Item Layout ▾
...	

11 Permission sets

11.1 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.

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

The screenshot shows the Salesforce Setup interface. The top navigation bar has 'Setup' and 'Home' buttons. Below them is a search bar labeled 'Search Setup'. The left sidebar has a 'Permission Sets' button highlighted with a red box. Under 'Users', there is another 'Permission Sets' button also highlighted with a red box. The main content area is titled 'Permission Sets' and contains a table of existing permission sets. A 'New' button is visible at the top left of the table area, also highlighted with a red box. The table columns include 'Action', 'Permission Set Label', 'Description', and 'License'. One row is selected, showing 'Buyer' as the label and 'B2B Buyer Permission Set One Seat' as the license.

- Enter the label name as “Per to Worker”, API will be auto populated >> save.

The screenshot shows the 'Clone: Per to Worker' permission set creation page. At the top, it says 'Enter a new label and description for the cloned permission set.' Below that is a form with fields: 'Label' (containing 'Per to Worker'), 'API Name' (containing 'Per_to_Worker'), 'Description' (empty), 'Session Activation Required' (unchecked), and 'License' (empty). At the bottom of the form are 'Save' and 'Cancel' buttons, with 'Save' highlighted with a red box.

- Under Apps Select object settings.

Apps

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

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

- Click on Items object >> click on Edit >> under Item:Record Type Assignments, enable Gold,Silver >> Object permission check for read, edit and create.

SETUP **Permission Sets**

Permission Set Overview > Object Settings ▾ Items ▾

Items **Save** **Cancel**

Tab Settings

Available	Visible
<input checked="" type="checkbox"/>	<input type="checkbox"/>

Item: Record Type Assignments

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

Object Permissions

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

Field Permissions

- Click on Save.
- After saving the permission, click on the Manage assignment
- Now click on the Add Assignment.

Current Assignments

Add Assignment

Select Users to Assign

All Users

Full Name	Alias	Username	Role	Acti...	Profile
Chatter Expert	Chatter	chatty.00d5i000003ksyzea4.t4i5wtjeybt4@chatter.salesforce.com	<input checked="" type="checkbox"/>		Chatter Free User
Integration User	integ	integration@00d5i000003ksyzea4.com	<input checked="" type="checkbox"/>		Analytics Cloud Integration User
Mani deepak	mdeep	manideepak143@gmail.com	<input checked="" type="checkbox"/> Worker	<input checked="" type="checkbox"/> Worker	
Megha Katoju Site Guest User	guest	megha_katoju@00d5i000003ksyzea4.org.force.com	<input checked="" type="checkbox"/>		Megha Katoju Profile
Meghana Katoj Site Guest User	guest	meghana_katoj@00d5i000003ksyzea4.org.force.com	<input checked="" type="checkbox"/>		Meghana Katoj Profile

Cancel Next

- Now select the users which you have created in user milestone using Worker profile and click on Next > Assign > Done.

Select Users to Assign

All Users

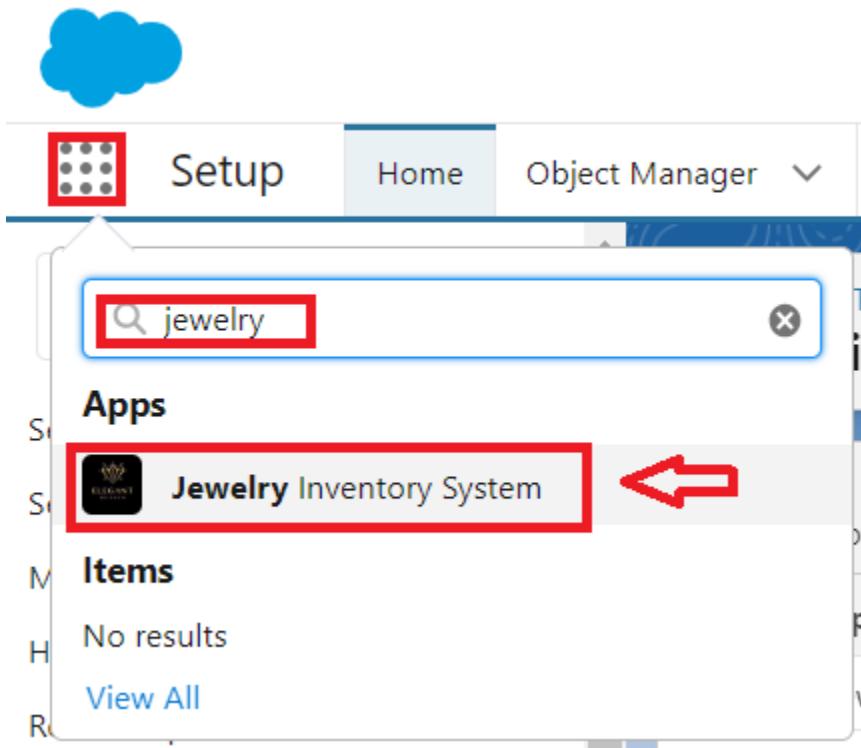
Full Name	Alias	Username	Role	Acti...	Profile
Chatter Expert	Chatter	chatty.00d5i000003ksyzea4.t4i5wtjeybt4@chatter.salesforce.com	<input checked="" type="checkbox"/>		Chatter Free User
Integration User	integ	integration@00d5i000003ksyzea4.com	<input checked="" type="checkbox"/>		Analytics Cloud Integration User
Mani deepak	mdeep	manideepak143@gmail.com	<input checked="" type="checkbox"/> Worker	<input checked="" type="checkbox"/> Worker	
Megha Katoju Site Guest User	guest	megha_katoju@00d5i000003ksyzea4.org.force.com	<input checked="" type="checkbox"/>		Megha Katoju Profile
Meghana Katoj Site Guest User	guest	meghana_katoj@00d5i000003ksyzea4.org.force.com	<input checked="" type="checkbox"/>		Meghana Katoj Profile

Cancel Next

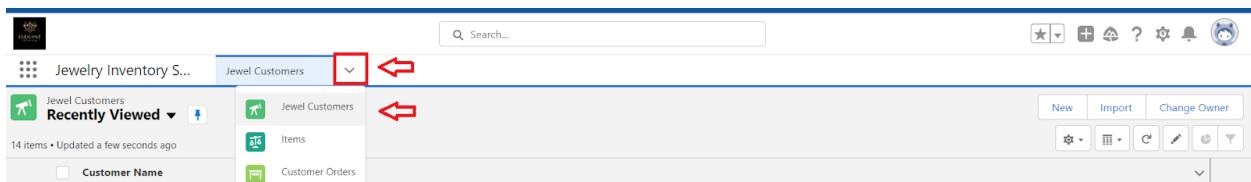
12 User Adoption

12.1 Create a Record (Jewel Customer)

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



- Click on Drop Down and Click on the Jewel Customer tab.
- Click New



12.2 View a Record(Jewel Customer)

- Click on App Launcher on the left side of the screen.
- Search Jewelry Inventory System & click on it.
- Click on the Jewel Customer Tab.
- Click on any record name. you can see the details of the Jewel Customer.

12.3 Delete a Record(Jewel Customer)

- Click on App Launcher on the left side of the screen.
- Search Jewelry Inventory System & click on it.
- Click on the Jewel Customer Tab.
- Click on Arrow at right hand side on that Particular record.
- Click delete.
- Note: Create at least 10 records for each of the objects: Jewel Customer, Price, Item, Customer Order, and Billing.

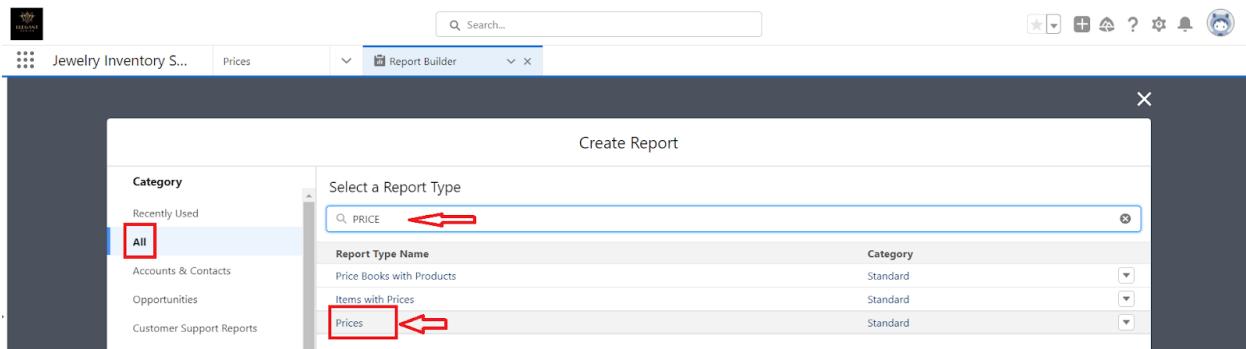
13.Reports

13.1 Create Report

- Go to the app >> click on the reports tab.
- Click New Report.

Folder	Created By	Created On	Subscribed
Private Reports	meghana katoju	7/19/2023, 4:34 AM	
Private Reports	meghana katoju	7/19/2023, 4:30 AM	
Private Reports	meghana katoju	7/19/2023, 4:27 AM	
DreamHouse Reports	meghana katoju	5/31/2022, 11:25 PM	
Private Reports	meghana katoju	7/12/2023, 8:45 PM	✓
Private Reports	meghana katoju	7/10/2023, 8:48 PM	
Private Reports	meghana katoju	7/12/2023, 12:03 AM	
Private Reports	meghana katoju	7/12/2023, 12:01 AM	
Private Reports	meghana katoju	7/11/2023, 11:49 PM	
Private Reports	meghana katoju	6/20/2023, 11:19 PM	
Private Reports	meghana katoju	6/20/2023, 11:08 PM	

- Select report type from the category or from the report type panel or from search panel ? click on start report.



- Customize your report
- Add fields from the left pane as shown below.
- Save or run it.

Jewellery Inventory ... Reports Report Builder

REPORT ▾

New Prices Report Prices

Previewing a limited number of records. Run the report to see everything.			
	Price: Price Id	Gold Price	Silver Price
1	Price-02	₹23,000.00000	₹1,000.00000
2	Price-06	₹32,000.00000	₹6,000.00000
3	Price-05	₹36,540.00000	₹5,000.00000
4	Price-01	₹54,000.00000	₹54,000.00000
5	Price-03	₹63,000.00000	₹2,500.00000
6	Price-04	₹65,325.00000	₹5,220.00000
7	Price-07	₹85,000.00000	₹2,000.00000
8	Price-08	₹63,500.00000	₹5,000.00000
9		₹4,22,365.00000	₹80,720.00000

Fields >

Outline ▼ **Filters 1**

Groups
GROUP ROWS
Add group... 🔍

Columns ▼
Add column... 🔍

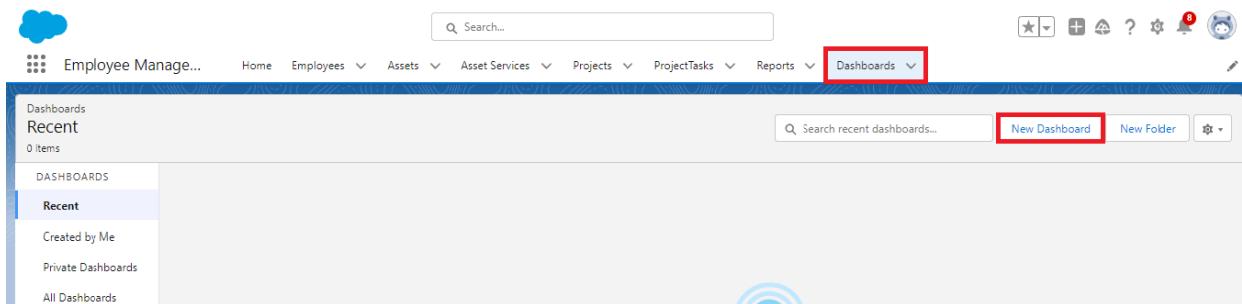
Price: Price Id X
Gold Price X
Silver Price X

- Note: Reports may get varied from the above pictures as the data might be different.
- Similarly, create the reports as mentioned in the above data, using the data given below:

- Create a report with report type: “Item with Billings”.
- Create a report with report type: “Billings with item and Customer order”.

14.Creating Dashboards

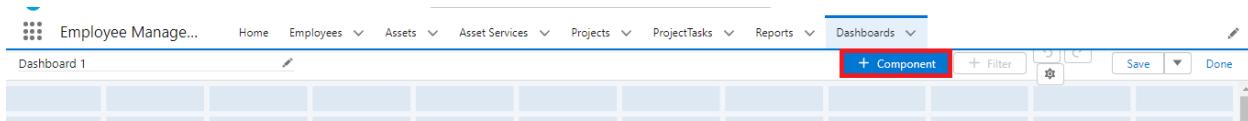
- Go to the app>>click on the Dashboards tabs.



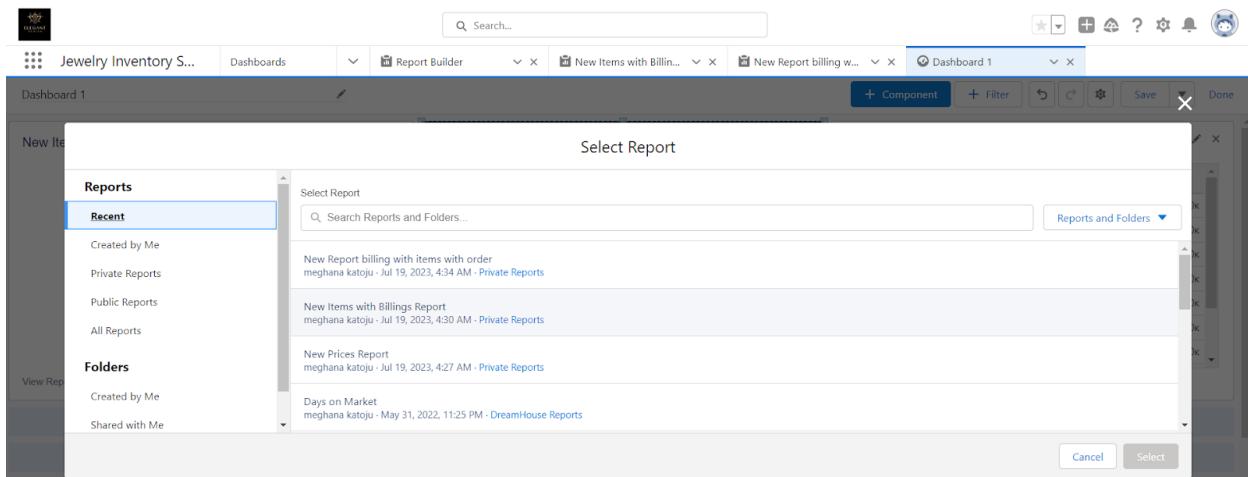
- Give a Name and click on Create.

The screenshot shows a 'New Dashboard' dialog box. At the top is the title 'New Dashboard'. Below it is a field labeled 'Name' with the value 'Dashboard 1'. There is a 'Description' field which is currently empty. Below that is a 'Folder' section with a dropdown menu showing 'Private Dashboards' and a 'Select Folder' button. At the bottom right of the dialog are two buttons: 'Cancel' and a large blue 'Create' button, which is also highlighted with a red box.

- Select add component.



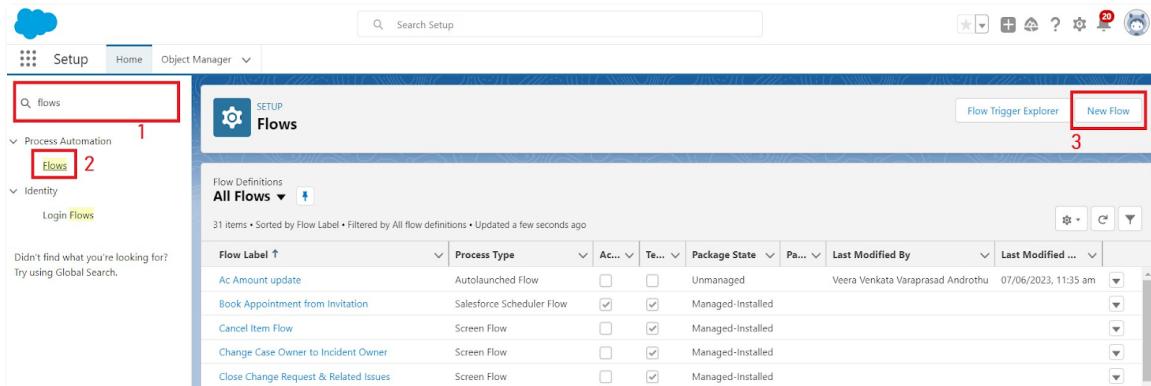
- Select a Report and click on select.



- Click Add, then click on Save and then click on Done.
- Note: Create another Dashboard as we discussed in activity 1.

15. Flows

- 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.

New Flow

Core All + Templates

1

2

Record-Triggered Flow
Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.

Schedule-Triggered Flow
Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.

Platform Event—Triggered Flow
Launches when a platform event message is received. This autolaunched flow runs in the background.

Autolaunched Flow (No Trigger)
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

Record-Triggered Orchestration
Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.

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 Optimize the flow for: “Actions and Related Records” and Click on Done.
- Now change the mode form Auto-layout to free-form.
- Now select the manger option in the toolbox, click New resource.

Configure Start

Select Object

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

*Object
Item

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 flow 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 is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

Cancel Done

- Select the resource type as text template.

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 flow 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 is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Done

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.

- Enter the API name a “ Email body”.

Edit Text Template

*** API Name** EmailBody

Description

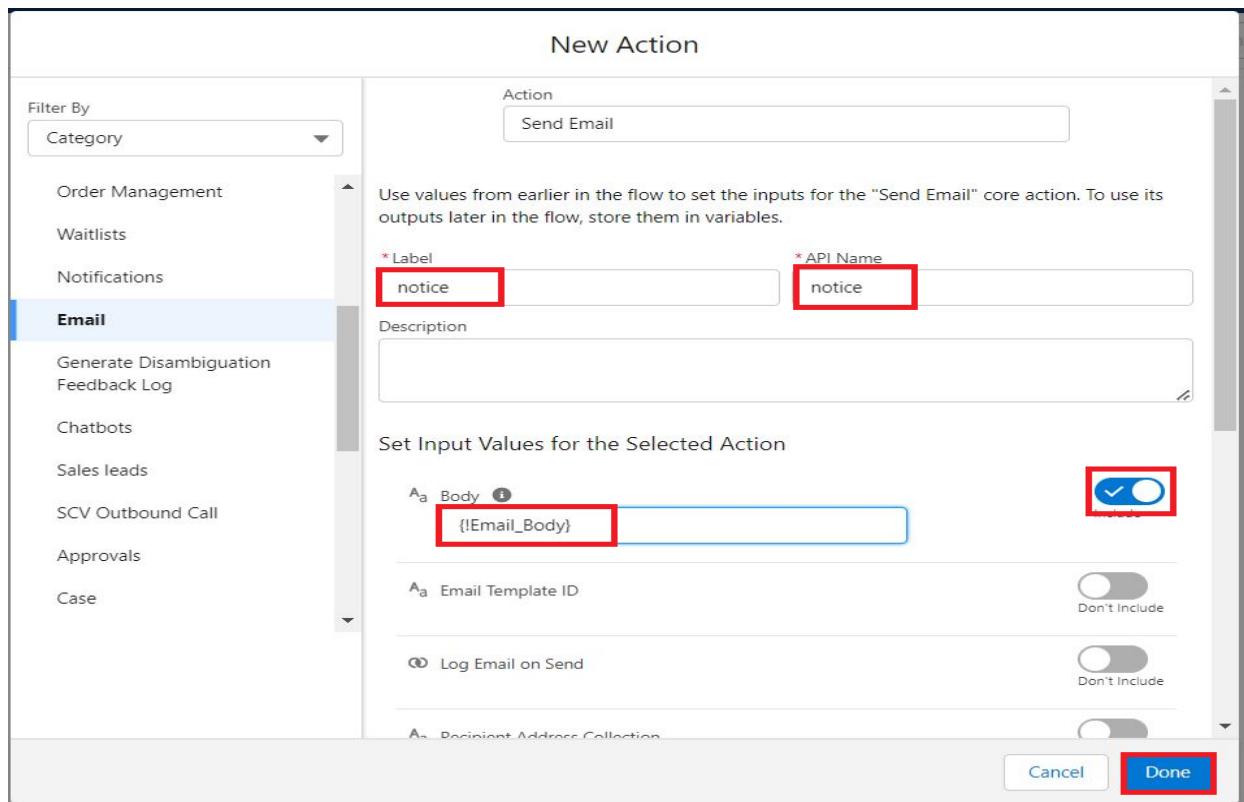
*** Body**

Insert a resource...

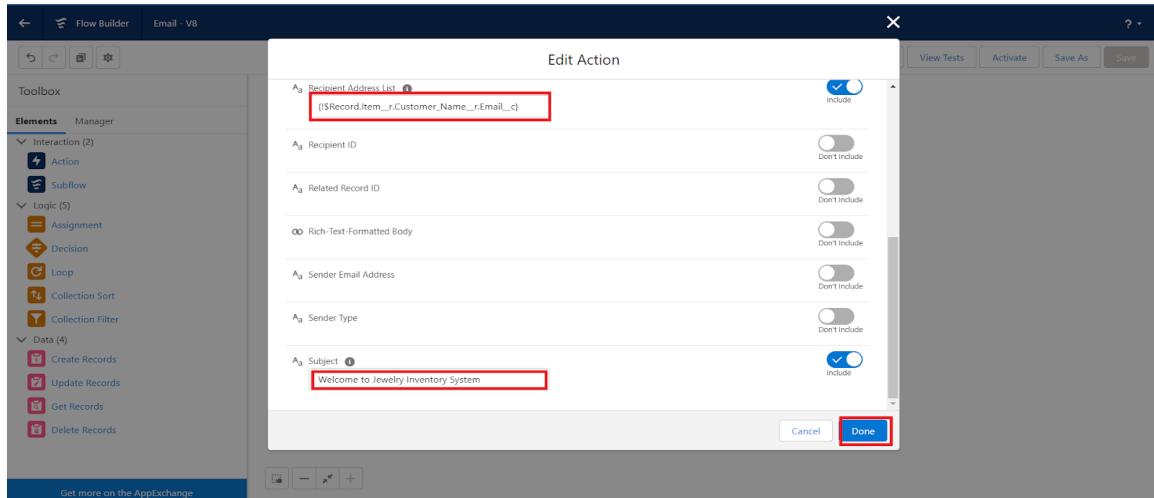
Hello
Customer Name: {!\$Record.Item__r.Customer_Name__r.Name}

Cancel Done

- Change the view as Rich Text>>View to Plain Text.
- In the body field paste the syntax that is given below.
- Hello
- Customer Name: {!\$Record.Item__r.Customer_Name__r.Name}
- Here are the details for the item you purchased with Jewelry Inventory System
- Item Type: {!\$Record.Item__r.Item_Type__c}
- Ornament: {!\$Record.Ornament__c}
- Weight: {!\$Record.Weight__c}grams
- Amount: {!\$Record.Amount__c}
- Click done.
- Now click on elements, and drag the action element into the preview pane.
- Their action bar will be opened in that search for “ send email ” and click on it.
- Give the label name as “ notice ”
- API name will be auto populated.
- Enable the body in set input values for the selected action.
- Select the text template that was created.



- Include the Recipient Address list, select the email from the record.
- `({$Record.Item_r.Customer_Namer.Email_c})`
- Include the subject as “Welcome to Jewelry Inventory System ”.
- Click done.



- Now drag the path from the start to the action element.
- Click on save. Given the Flow label , Flow API name will be auto populated.
- And click save, and click on activate.

