Project Report on

CRM Application For Jewel Management - (Admin)

(DEVELOPER) - (Long-Term)

Milestone – 01: Create Salesforce Org

Goto **developers.salesforce.com/Signup**

Click on sign up.

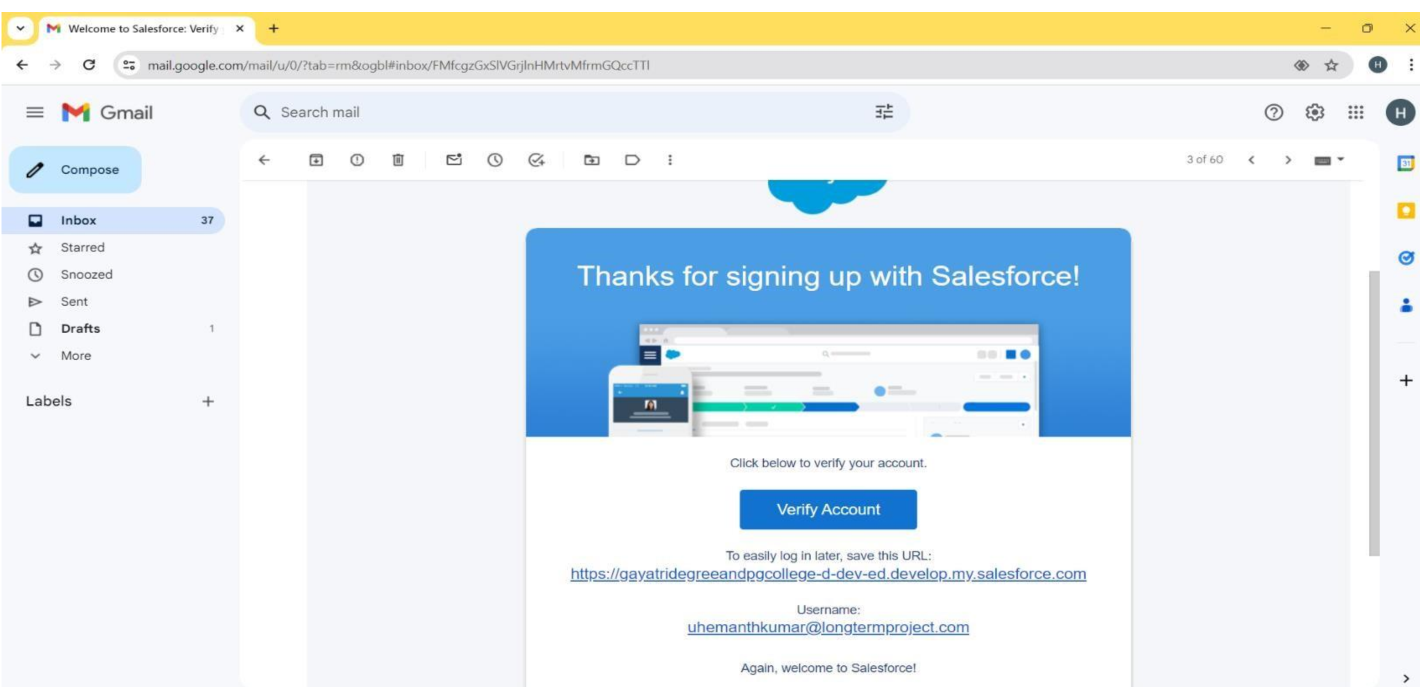
On the sign-up form, enter the following details:

1. First name & Last name – U Hemanth Kumar
2. Email –uhemanthkumar@gmail.com
3. Role: **Developer**
4. Company: GAYATRI DEGREE COLLEGE - TIRUPATI
5. County: India
6. Postal Code: 517501
7. Username: **hemanthkumar@longtermproject.com**

Account Activation

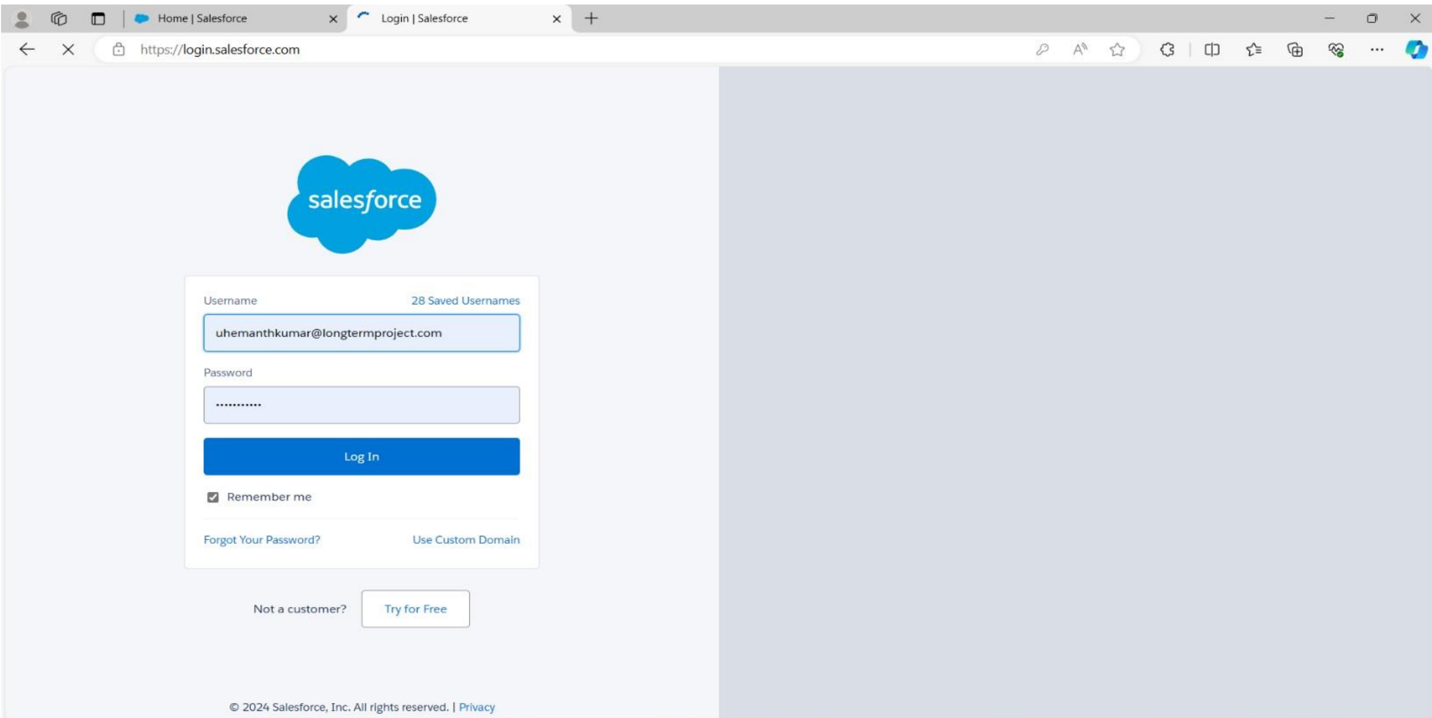
Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.

The email may take 5-10mins, as



Login to Your Salesforce Account

1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



Milestone – 02: Object Creation–

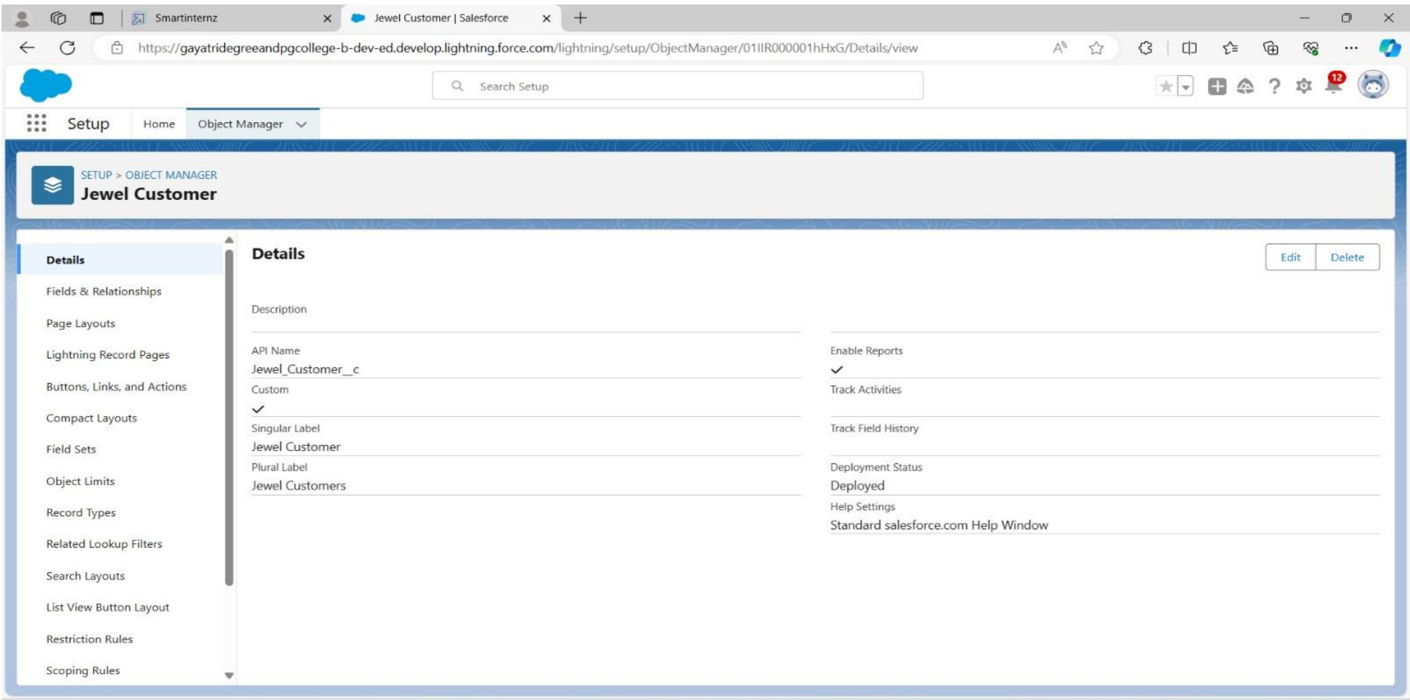
Jewel Customer

Click on the gear icon and then select Setup.

1. Click on the object manager tab just beside the home tab.
2. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
3. On the Custom Object Definition page, create the object as follow
4. Label: **Jewel Customer**
5. Plural Label: **Jewel Customers**
6. Record Name: **Customer Name**
7. Data Type: **Text**
8. Check the Allow Reports

9. Check the Allow Search

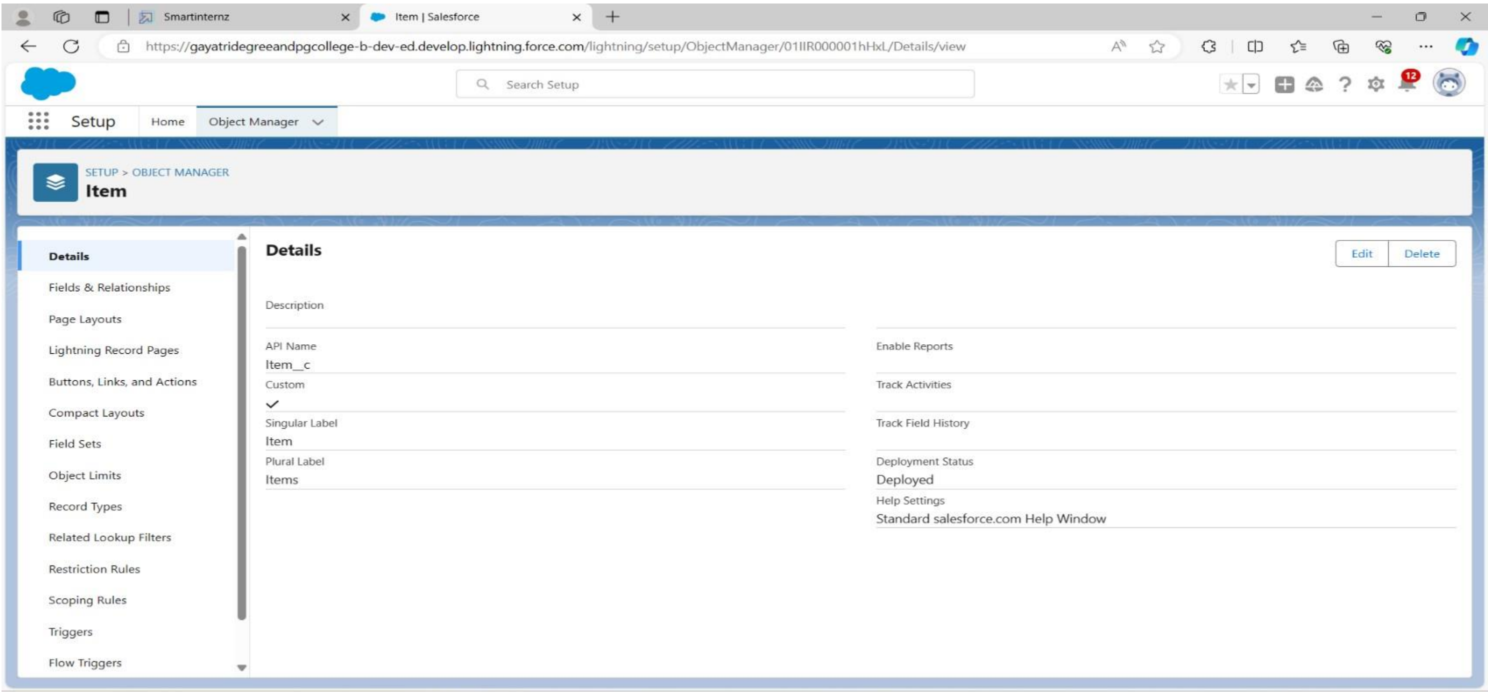
10. Click Save.



Object- Item

Click on the gear icon and then select Setup.

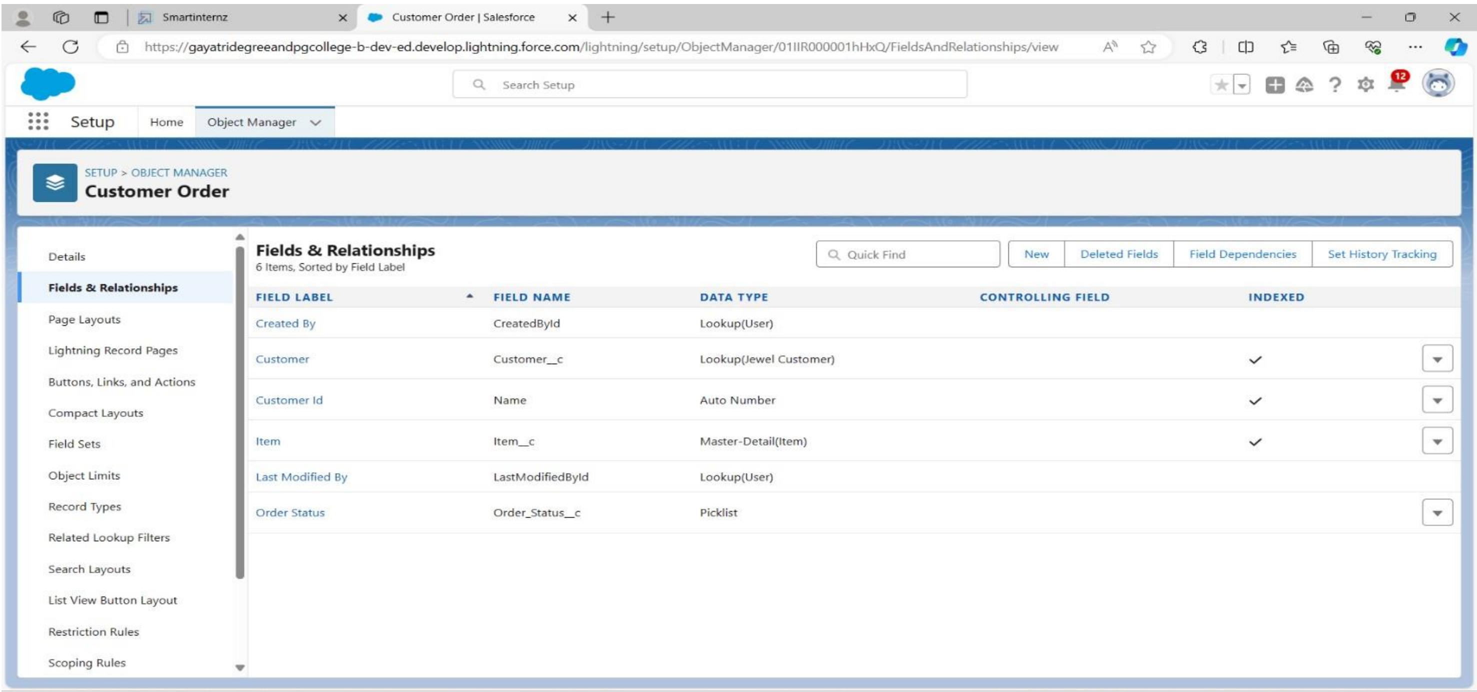
1. Click on the object manager tab just beside the home tab.
2. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
3. On the Custom Object Definition page, create the object as follows:
4. Label: **Item**
5. Plural Label: **Items**
6. Record Name -**Item Id**
7. Data Type – **Auto Number**
8. Display Format: Item-{00}
9. Starting Number: 1
10. Click on Allow reports, Allow search
11. Click Save.



Object- Customer Order

Click on the gear icon and then select Setup.

1. Click on the object manager tab just beside the home tab.
2. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
3. On the Custom Object Definition page, create the object as follows:
4. Label: **Customer Order**
5. Plural Label: **Customer Orders**
6. Record Name -**Customer Id**
7. Data Type – **Auto Number**
8. Display Format: Customer order-{00}
9. Starting Number: 1
10. Click on Allow reports, Allow search
11. Click Save.

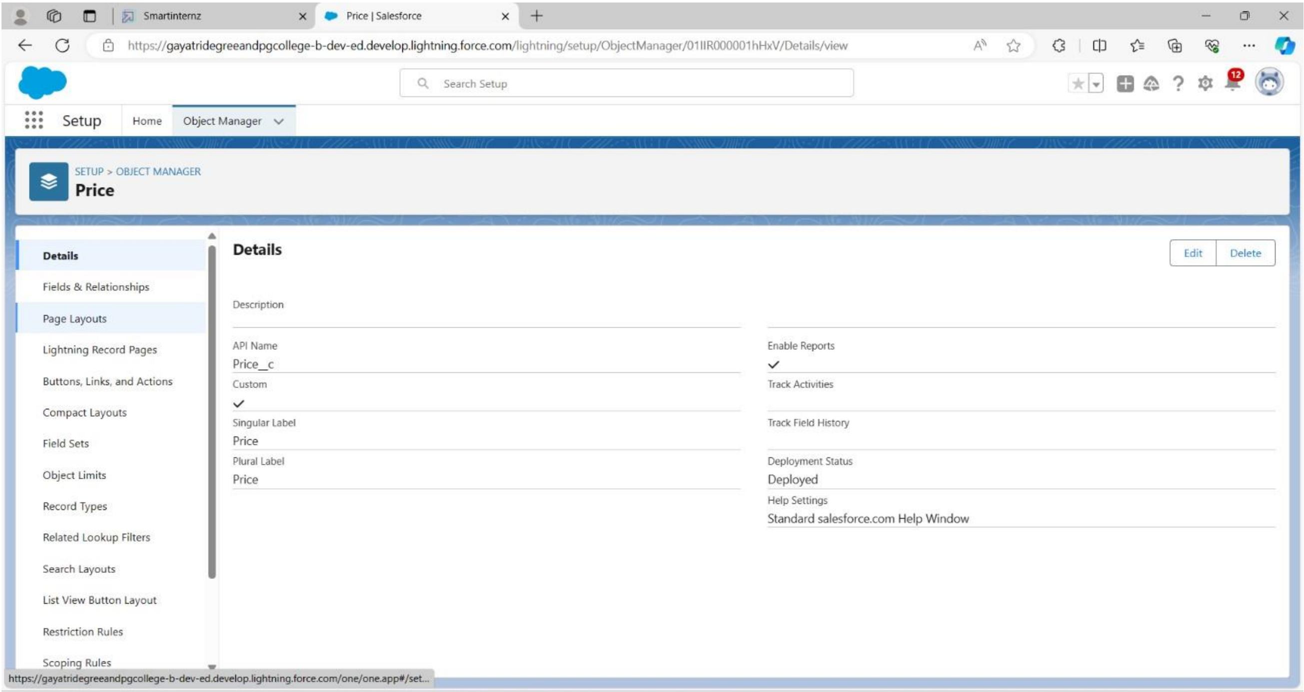


Object- Price

Click on the gear icon and then select Setup.

1. Click on the object manager tab just beside the home tab.
2. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
3. On the Custom Object Definition page, create the object as follows:
4. Label: **Price**
5. Plural Label: **Prices**
6. Record Name -**Price Id**
7. Data Type – **Auto Number**
8. Display Format: Price-{00}
9. Starting Number: 1
10. Click on Allow reports, Allow search

11. Click Save.



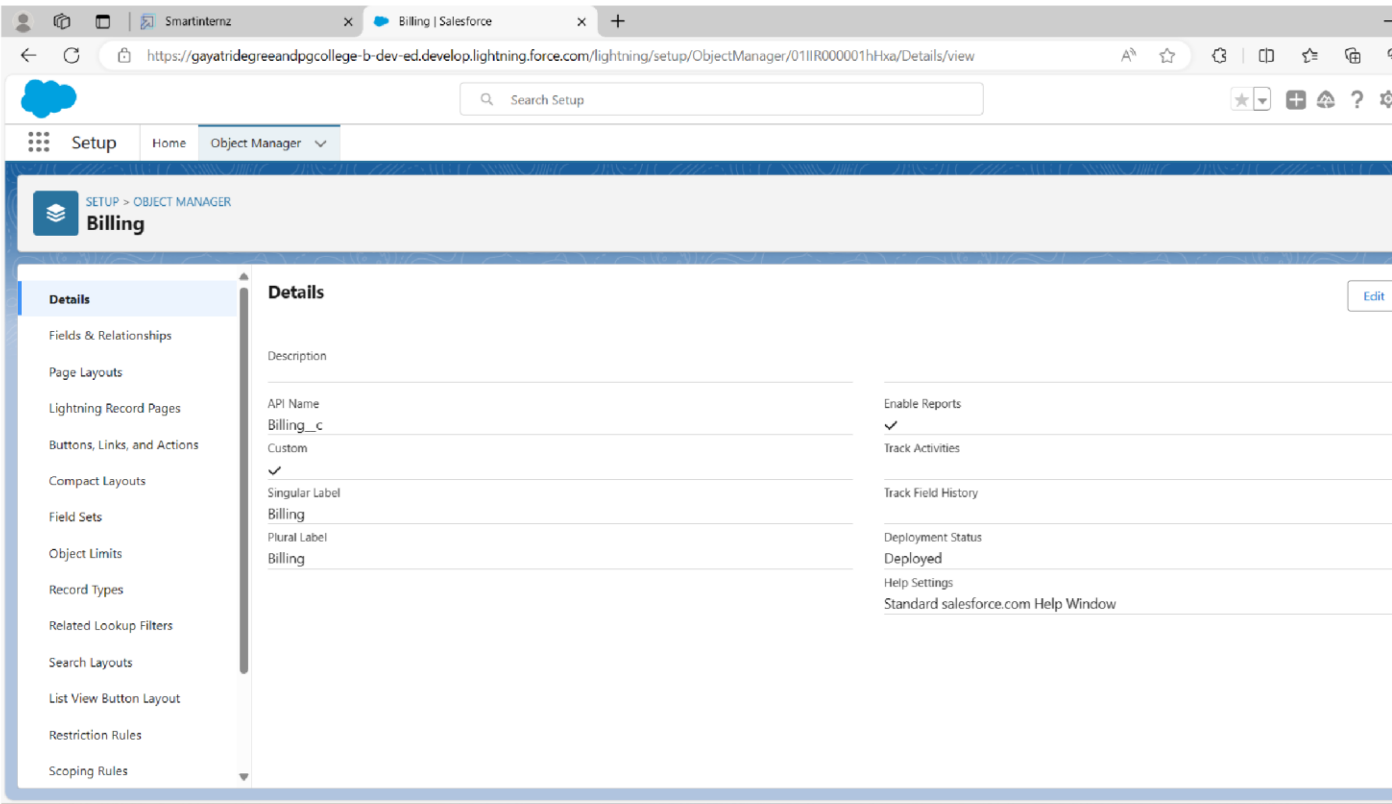
12.

Object- Billing

Click on the gear icon and then select Setup.

1. Click on the object manager tab just beside the home tab.
2. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
3. On the Custom Object Definition page, create the object as follows:
4. Label: **Billing**
5. Plural Label: **Billings**
6. Record Name -**Billing Id**
7. Data Type – **Auto Number**
8. Display Format: Billing-{00}
9. Starting Number: 1
10. Click on Allow reports, Allow search

11. Click Save.



12.

Milestone – 03: Creating A Custom Tab Now create a custom tab.

Click the Home tab.

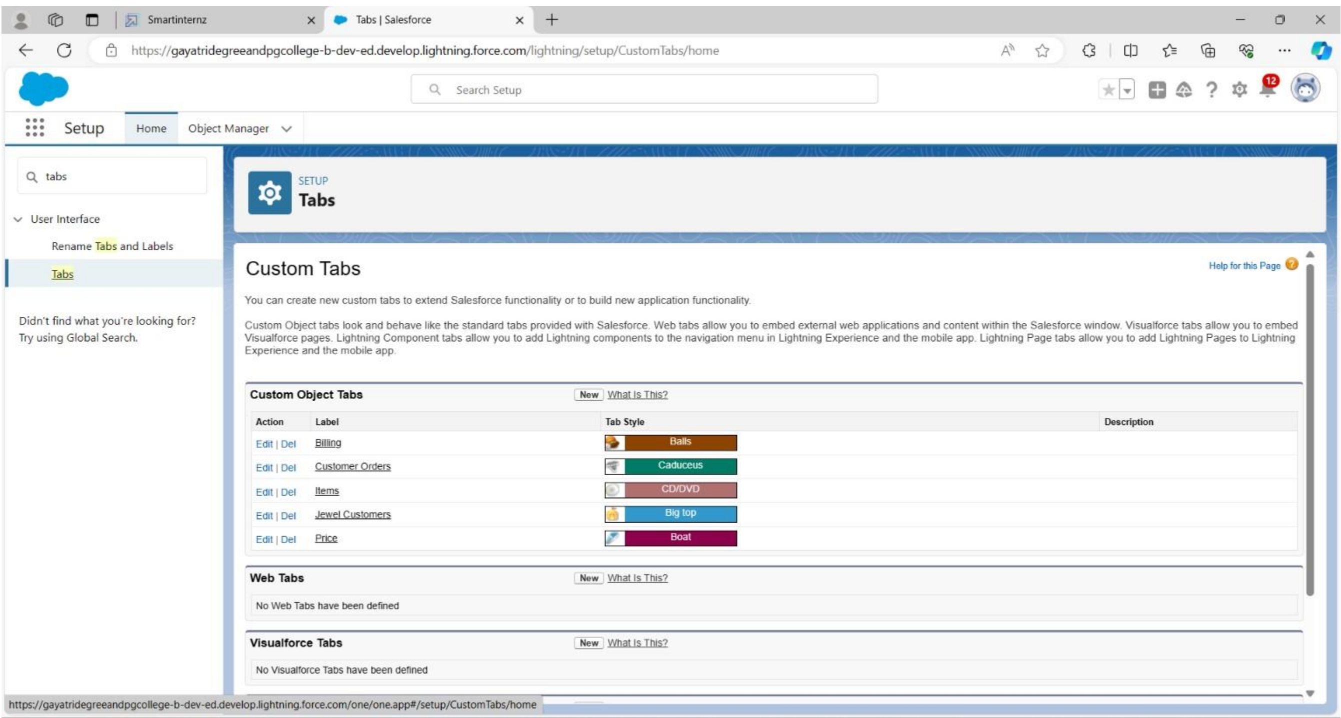
1. Enter Tabs in Quick Find and select Tabs.

2. Under Custom Object Tabs, click New.

3. For Object, select Jewel Customer.

4. For Tab Style, select any icon.

5. Next (Add to profiles page) keep it as default - Next (Add to Custom App) Keep it as default. 6. Click Save



Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “Item, Customer Order, Price Billing”.

Milestone – 04: Lightning App **Jewelry Inventory System**

1. From Setup, enter App Manager in the Quick Find and select App Manager.

2. Click New Lightning App.

3. Fill the app Name as **Jewelry Inventory System**

4. Upload a photo that related to App (it is not Mandatory)

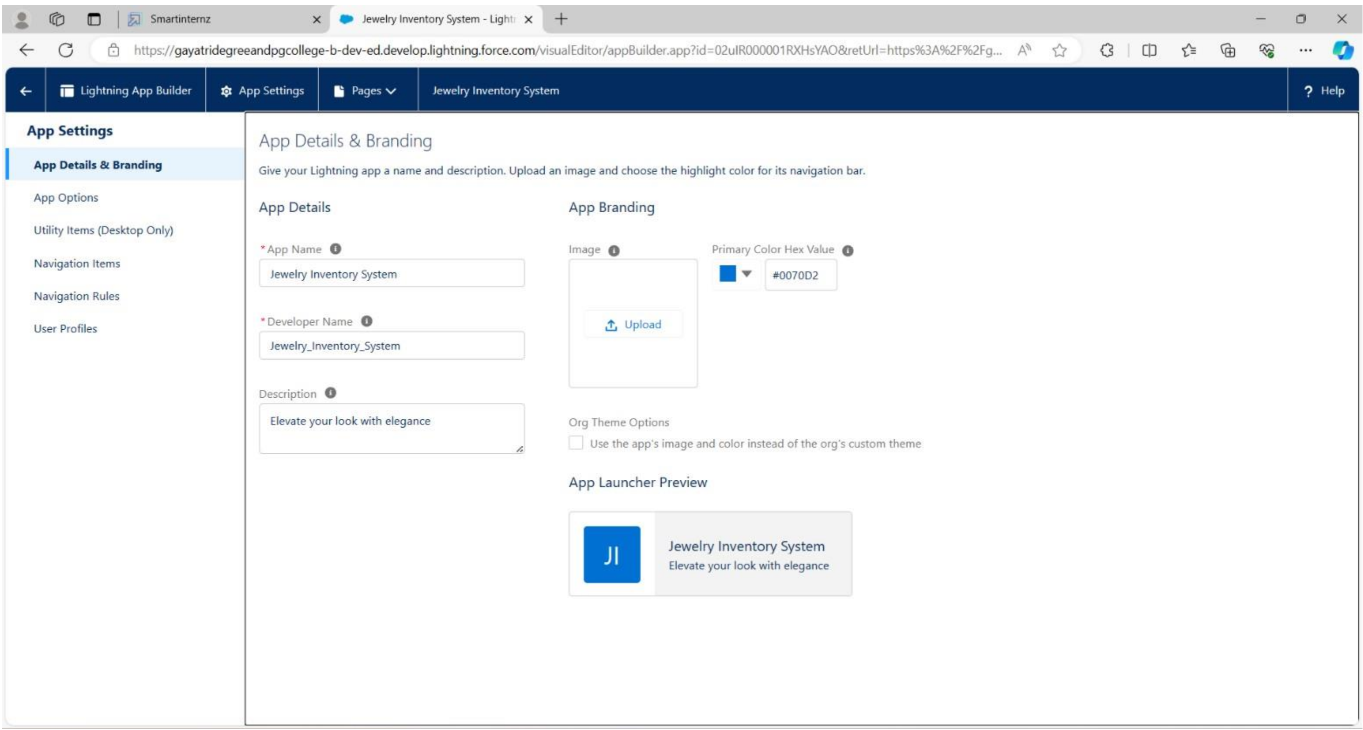
5. Description: Elevate your look with elegance
6. Under App Options, Set Navigation Style as Console Navigation

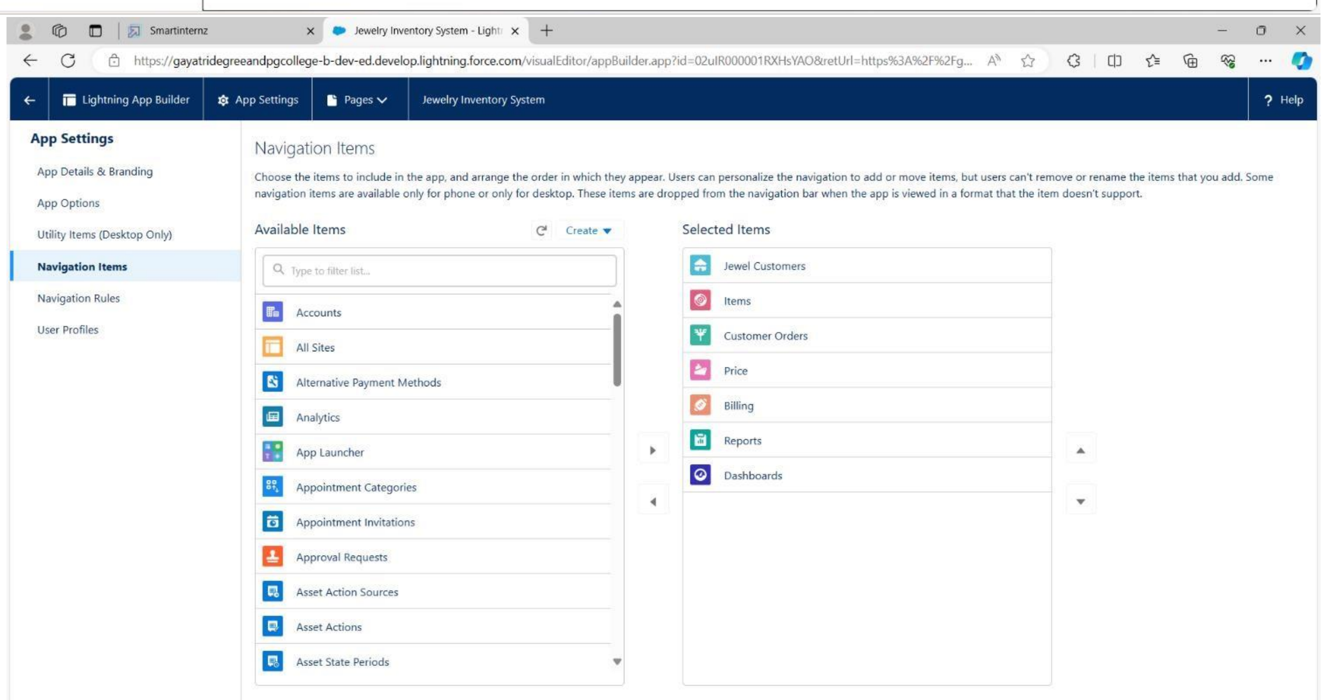
7. Under Utility Items, leave as is and click Next.

8. From Available Items, select **Jewel Customer, Item, Customer Orders, Price, Billing**, **Reports, Dashboards** and move them to Selected Items.

9. Click Next.

From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.





Milestone – 05: Fields

Create a relationship between Jewel Customer & Customer Order Objects.

1.Click the gear icon and select Setup. This launches Setup in a new tab.

2. Click the Object Manager tab next to Home.

3. Search for Customer Orders object click on it

4. Select Fields & Relationships from the left navigation

5. Click New

6. Select the Lookup as the Data Type, click next.

7. Related Object: Jewel Customer

8. Label: Customer

9. Click Next, Next, then Save & New.

Now Let's create a another field on Customer Order object

1. Click the Object Manager tab next to Home.

2. Search for Customer Orders object click on it

3. Select Fields & Relationships from the left navigation

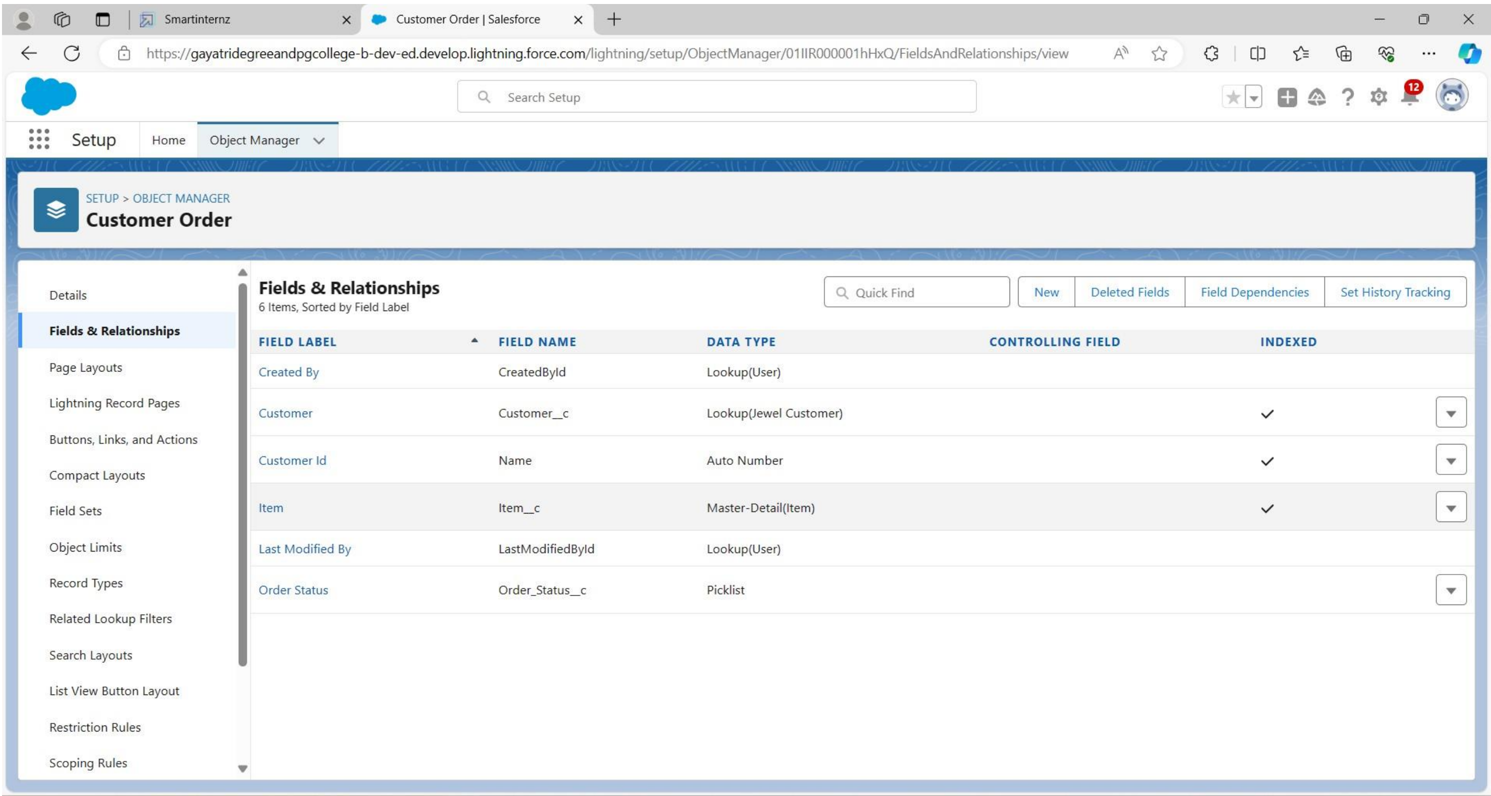
4. Click New

5. Select the Master detail as the Data Type, click next.

6. Related Object: Item

7. Label: Item

8. Click Next, Next, then Save

9. 

Now Let's create a field on Jewel Customer object

1. Click the Object Manager tab next to Home.

2. Select: Jewel Customer.

3. Select Fields & Relationships from the left navigation

4. Click New

5. Select the Text as the Data Type, then click Next.

6. For Field Label enter City.

7. Length: 20

8. Click Next, Next, then Save & New.

Let's create another field Jewel Customer object

1. Click the gear icon and select Setup. This launches Setup in a new tab.

2. Click the Object Manager tab next to Home.

3. Select Jewel Customer.

4. Select Fields & Relationships from the left navigation

4. Click New & select data type as Phone, click Next

6. For Field Label enter Phone

7. Click Next, Next, then Save & New.

Now Let's create another field Jewel Customer object 1.

Click the gear icon and select Setup. This launches Setup in a new tab.

2. Click the Object Manager tab next to Home.

3. Select Jewel Customer.

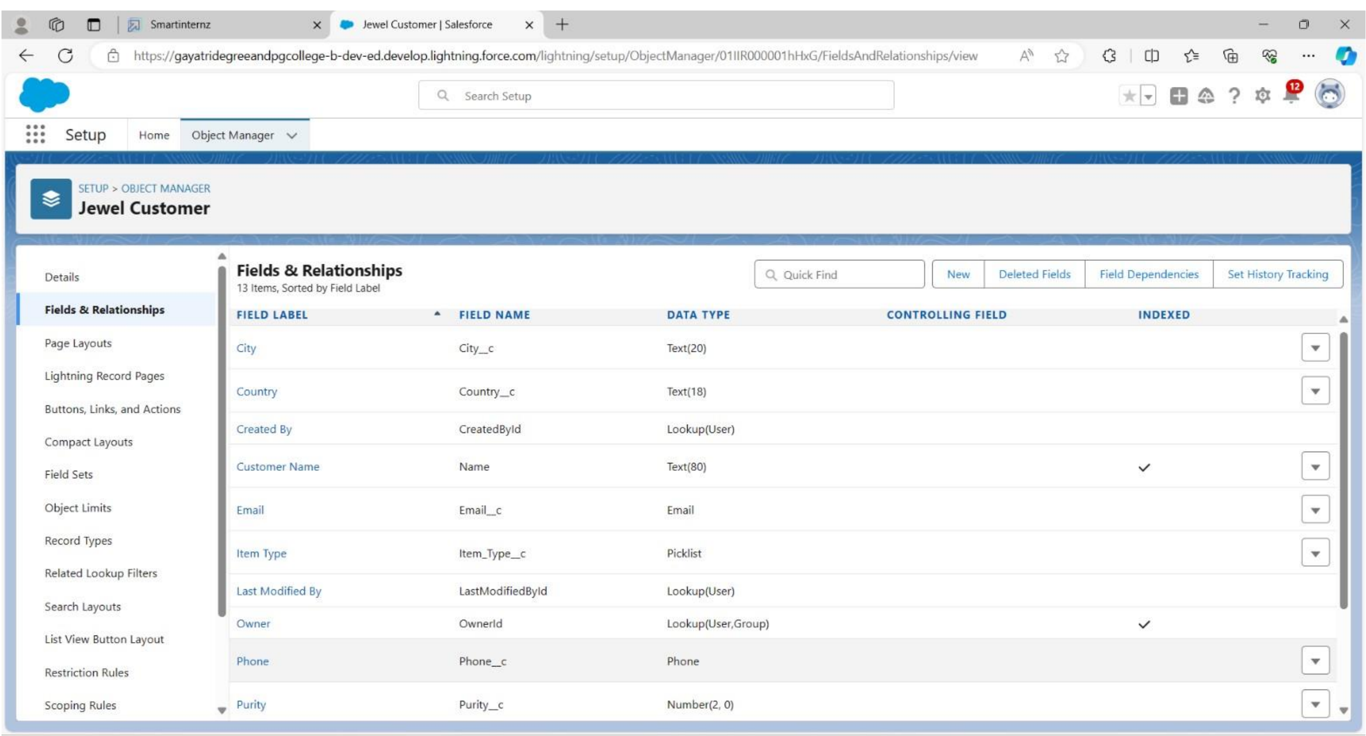
4. Select Fields & Relationships from the left navigation.

5. Click New

6. Select the Email as the Data Type, then click Next.

7. Give field label Email.

8. .Click Next, Next, then Save.



Creating The Field In Item Object

1. Click the gear icon and select Setup. This launches Setup in a new tab.

2. Click the Object Manager tab next to Home.

3. Select Item.

4. Select Fields & Relationships from the left navigation

5. Click New

6. Select the Number as the Data Type, then click Next.

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

8. Click Next, Next, then Save & New.

To Create a Fields & Relationship to an Item Object

1. Click the gear icon and select Setup. This launches Setup in a new tab.

2. Click the Object Manager tab next to Home.

3. Select Item.

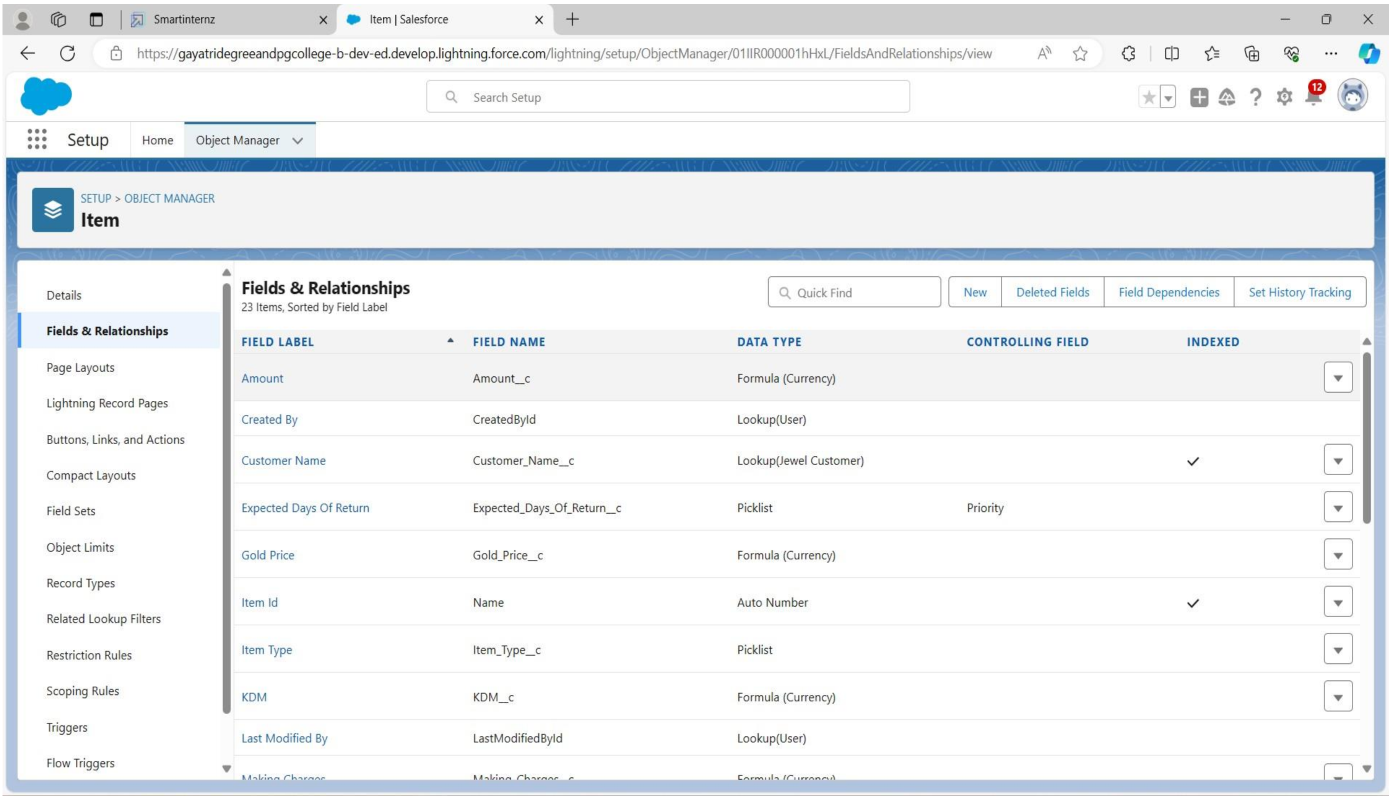
4. Select Fields & Relationships from the left navigation

5. Click New

6. Select the Picklist as the Data Type, then click Next.

7. Field label: Item Type

8. Enter values (Gold, Silver), with each value separated by a new line 9. Click Next, Next, Next then Save

10. 

To Create A Fields & Relationship To An Price Object

1. Click the gear icon and select Setup. This launches Setup in a new tab.

2. Click the Object Manager tab next to Home.

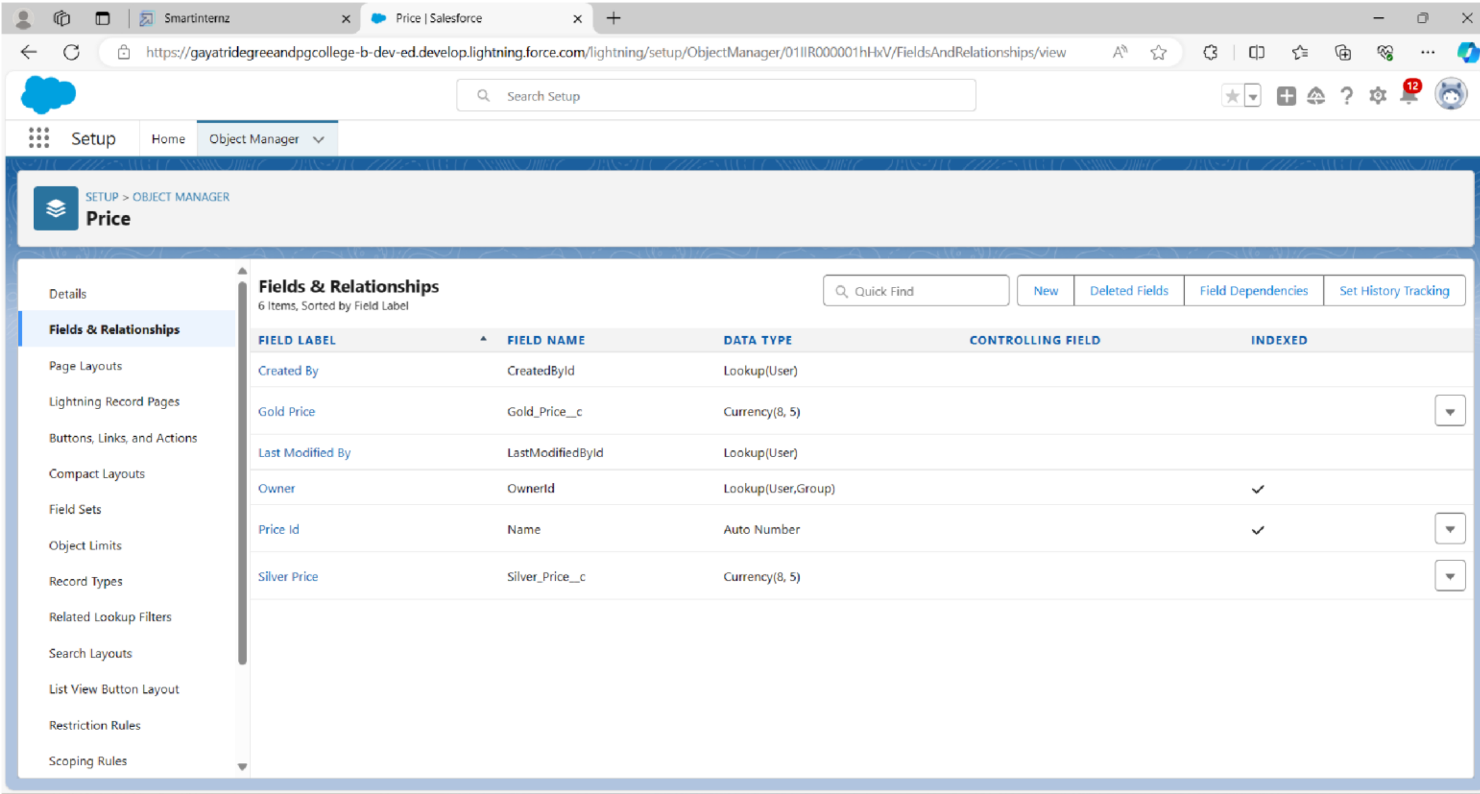
3. Select Price.

4. Select Fields & Relationships from the left navigation

5. Label: Gold Price

6. length as “ 8”and decimal 5
7. Click Next, Next, save.

8.



To Create a cross object field in Item Object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Item.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Formula as the Data Type, then click Next.
7. Give Field Label and Field Name as "Gold Price" and select formula return type as "Currency" and click next.
8. Under Advanced Formula write down the formula : Prices__r.Gold_price__c / 10.
9. click "Check Syntax" and Next >> Next >> Save & New.

Creating Remaining Fields In Objects

s.no	Object name	Fields

1	Jewel Customer	

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	<table><tr><td>Field Label:Item</td><td>Lookup Relationship with Item Object</td></tr><tr><td>Ornament</td><td>Formula (Return Type:Text) Item__r.Ornament__c</td></tr><tr><td>Stone weight</td><td>Formula (Return Type:Number) (Decimal=2) Item__r.Stone_weight__c</td></tr><tr><td>Weight</td><td>Formula Return Type:Number (Decimal=2) Item__r.Total_weight__c</td></tr></table>

Amount	Formula (Return Type:Currency) (Decimal=2) Item__r.Amount__c
Gold/Silver Price	Formula (Return Type:Currency) (Decimal=2) IF(ISPICKVAL(Item__r.Item_Type__c ,"Gold"), Item__r.Gold_price__c , Item__r.Silver_price__c)
KDM Charge	Formula (Return Type:Currency) (Decimal=0) Item__r.KDM__c
Making Charges	Formula (Return Type:Currency) (Decimal=2) Item__r.Making_Charges__c
Stones/other price	Formula (Return Type:Currency) (Decimal=2) Item__r.Stone_other_price__c
Total Amount	Formula (Return Type:Currency) (Decimal=0) Amount__c + KDM_Charge__c + Stones_other_price__c + Making_Charges__c

Creating Schema Builder

1. Click on Object Manager
2. Select Schema Builder
3. In select objects option click on custom object
4. Select Jewel Customer, Customer Orders, Item, Price, Billing object

Creating The Field Dependencies

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar >>click on the object.
2. Click on Fields & Relationships and click on the Priority field.
3. Search for Field Dependencies and click on New.
4. Select Controlling Field as “Priority” and Depending field as “Expected Days of Return”?Continue.
5. Select the “Expected Days of Return” values of related Priority values and Click on Include Values >> Save

Creating The Validation Rule

1. Go to the setup page - click on object manager - From drop down click Jewel Customer object.
2. Click on the validation rule - click New.
3. Enter the Rule name as “Postal Code”.

Enter the 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))
)

Create One more Validation rule for Jewel Customer object.

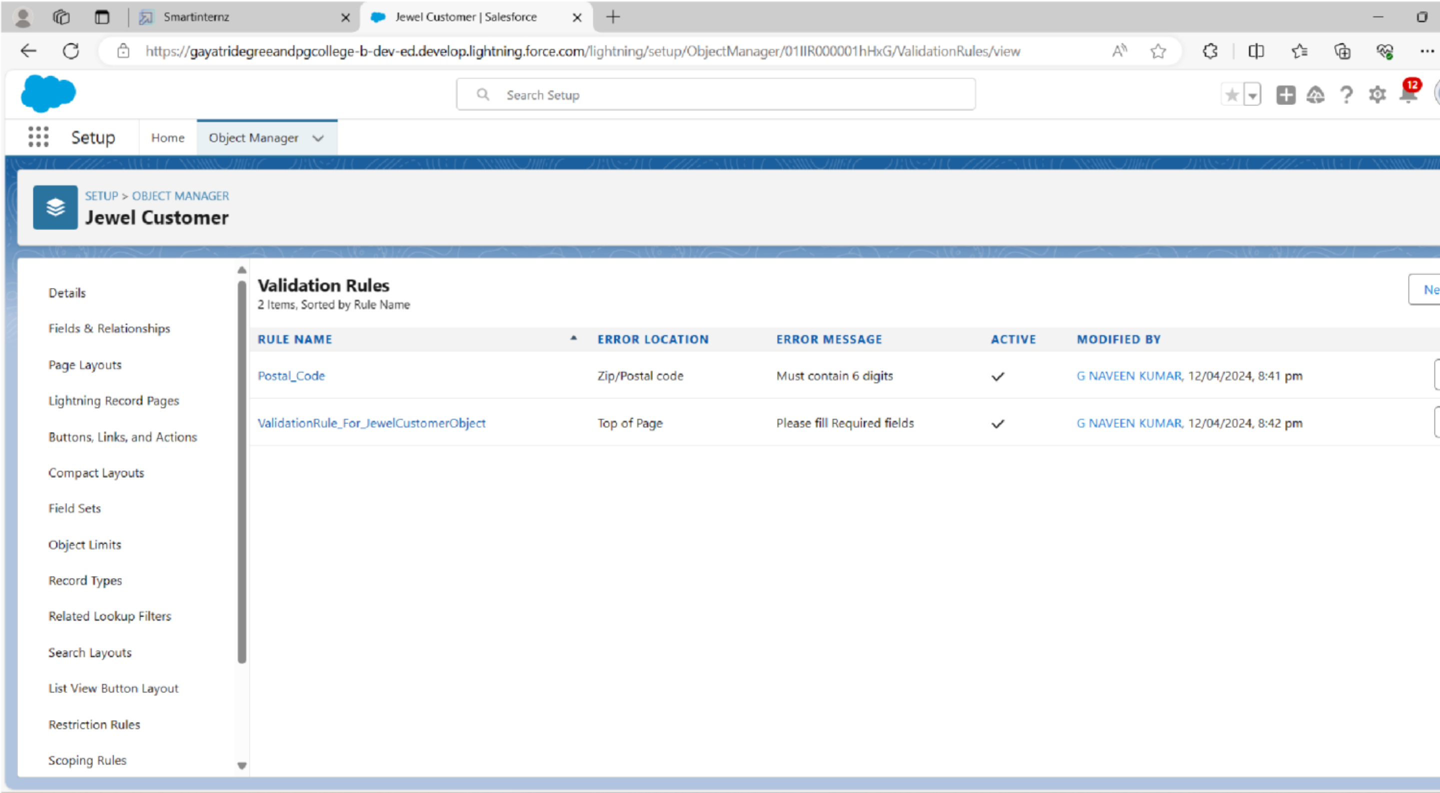
1. Enter Rule name as “ValidationRule For JewelCustomerObject “.
2. Insert the Error Condition Formula as : -

OR(ISBLANK(City__c) , ISBLANK(Country__c),ISBLANK(Phone__c),ISBLANK(State__c),ISBLANK(Street__c))

3. Enter the Error Message as “Please fill Required fields”, select the Error location as Top of Page and click Save.
4.

Create Validation rule for Item object.

1. Enter Rule name as “ValidationRule For Item“.
2. Insert the Error Condition Formula as : - OR(ISBLANK(Amount__c) ,

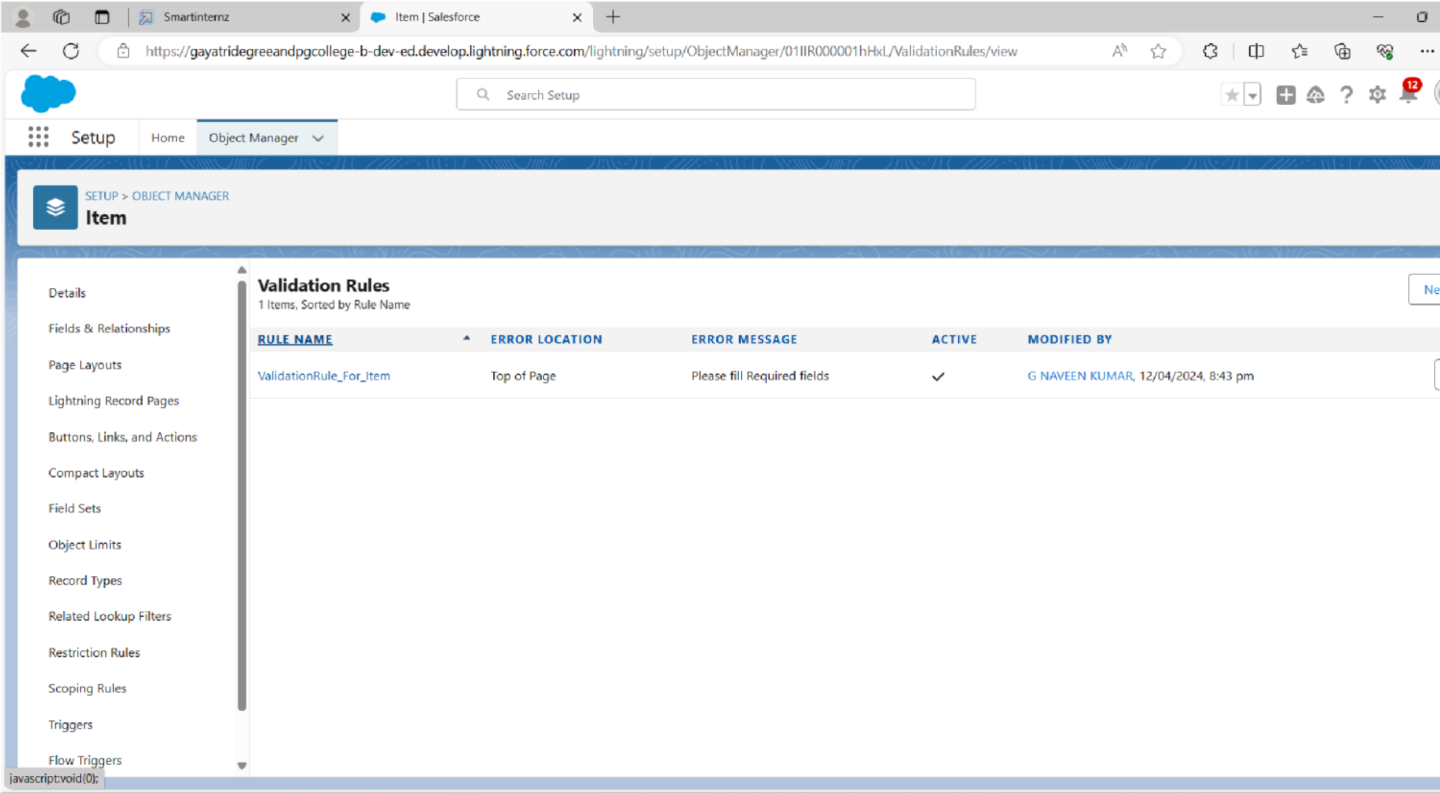


ISBLANK(Customer_Name__c) ,ISBLANK(Gold_price__c),ISBLANK(KDM__c),ISBLANK(Ornament__c),ISBLANK(Percentage__c),ISBLANK(Making_Charges__c),ISBLANK(Prices__c),ISBLANK(Stone_weight__c),ISBLANK(Silver_price__c),ISBLANK(Stone_other_price__c),ISBLANK(Stone_weight__c),ISBLANK(Weight__c))

3. Enter the Error Message as “Please fill Required fields”, select the Error location as Top of Page and click Save.
4.

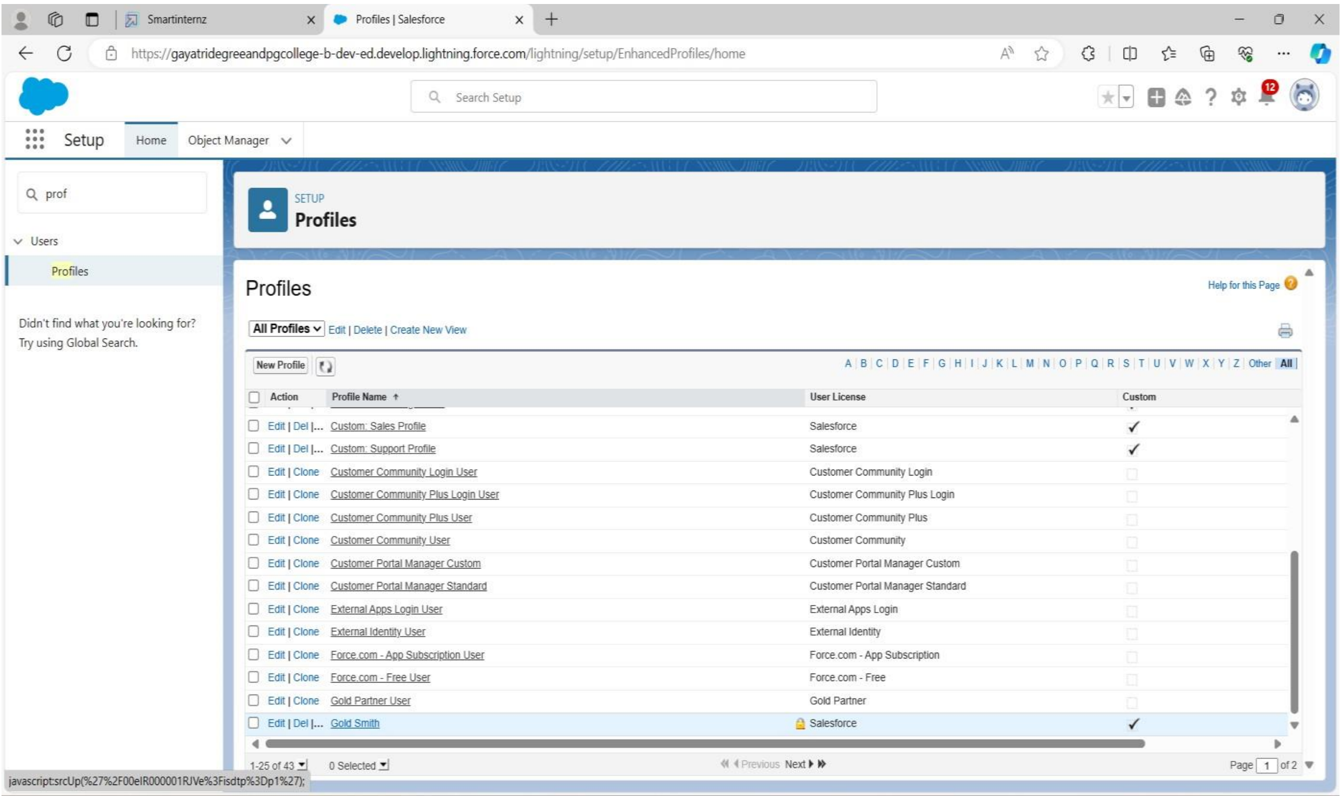
Milestone – 06: Profiles

Gold Smith



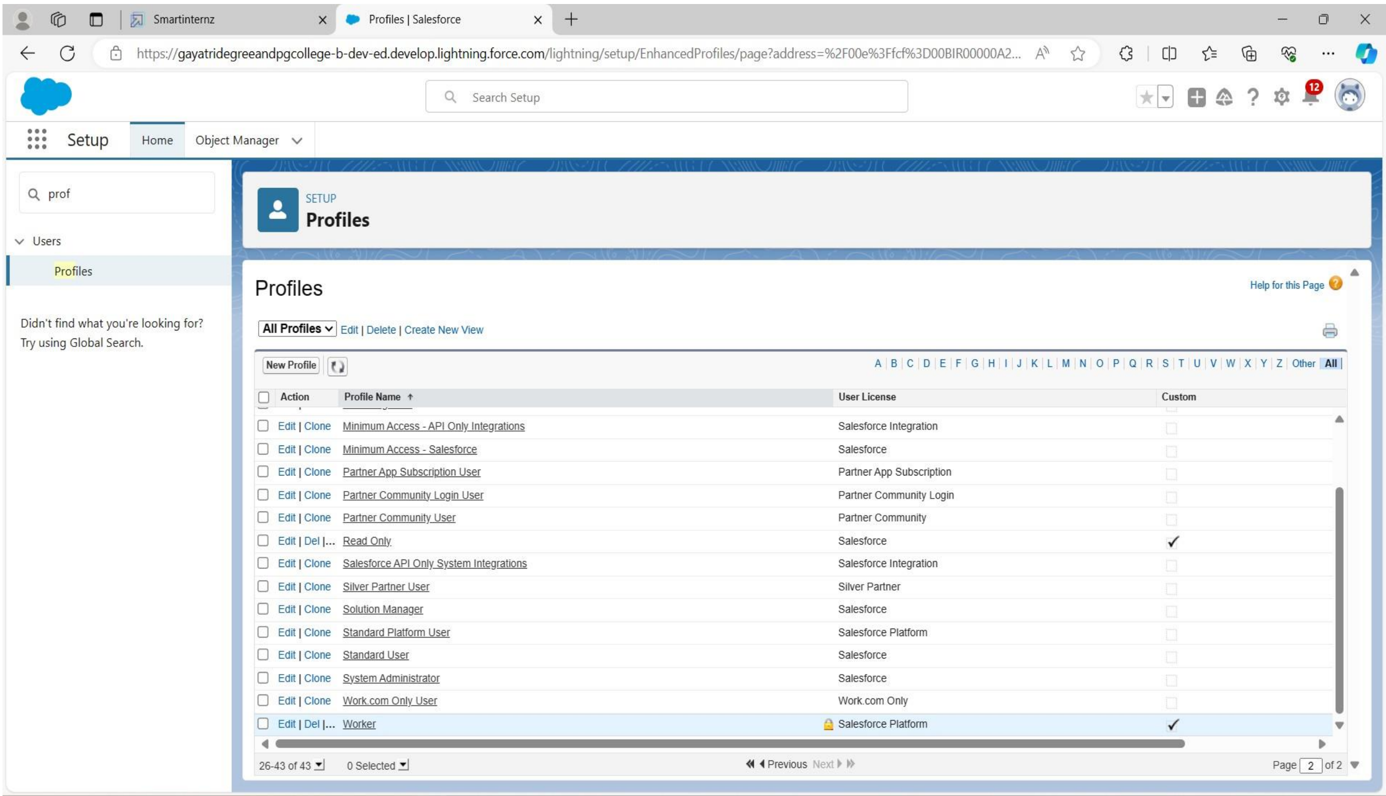
1. Go to setup - type profiles in quick find box - click on profiles - clone the desired profile (system administrator) - enter profile name (Gold Smith) - Save.

2. Scroll down to Custom Object Permissions and Give access permissions for Jewel Customer, Item, Customer Order, Prices, Billings objects.
3. Give Access and Save it.

4. 

Worker Profile:

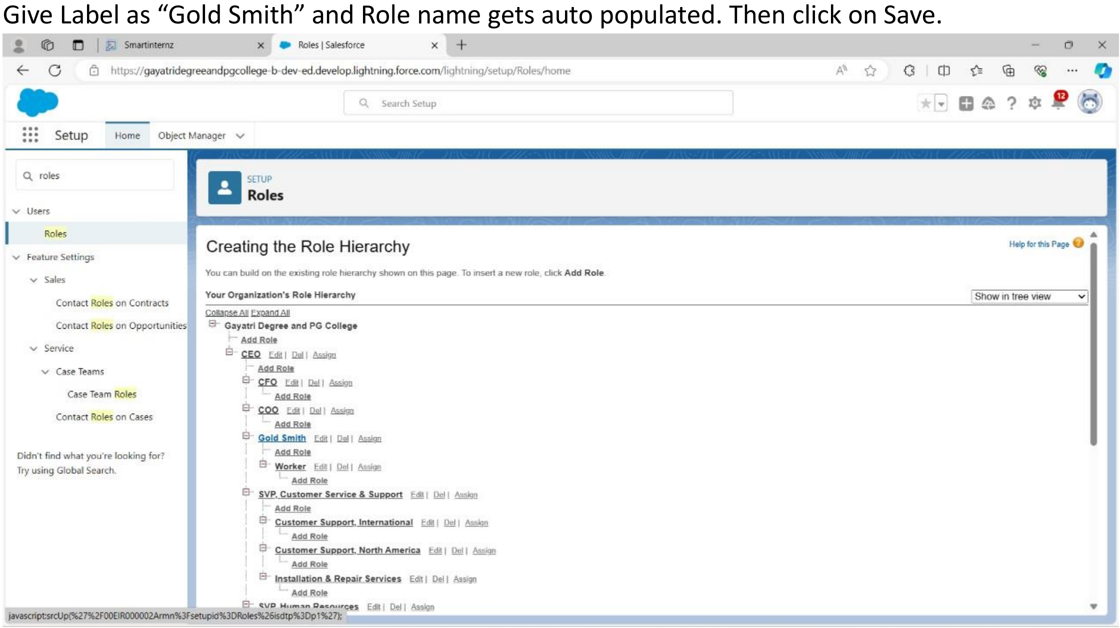
1. Go to setup - type profiles in quick find box -click on profiles - clone the desired profile (Standard Platform User) - enter profile name (Worker Profile) -Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Jewel Customer, item, Customer Order, Prices, Billings .objects.
4. Give Access and Save it.

5. 

Milestone – 07: Role

Creating Gold Smith Role

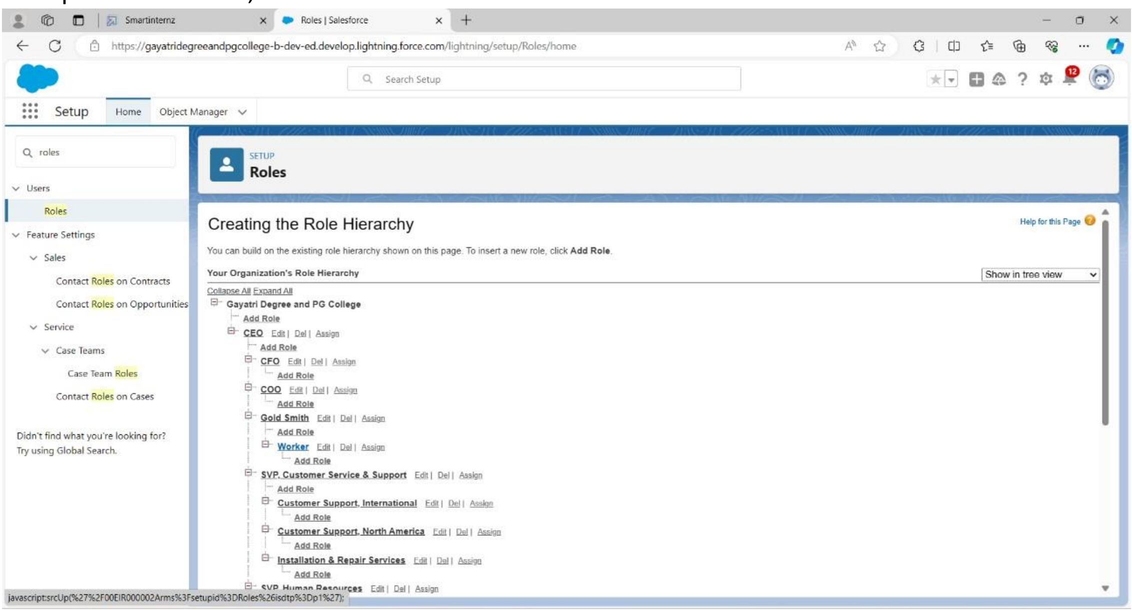
1. Go to quick find - Search for Roles - click on set up roles.
2. Click on Expand All and click on add role under whom this role works.
3. Give Label as “Gold Smith” and Role name gets auto populated. Then click on Save.

4. 

5. Click and save it.

Creating Worker roles:

Creating another two roles under manager

1. Go to quick find - Search for Roles - click on set up roles.
2. Click plus on CEO role, and click add role under Gold Smith.
3. 

4. Give Label as “Worker” and Role name gets auto populated. Then click on Save.

Milestone – 08: Users

Create User

1. Go to setup - type users in quick find box - select users -click New user.
2. Fill in the fields
3. First Name : Niklaus
4. Last Name : Mikaelson
5. Alias : Give a Alias Name
6. Email id : Give your Personal Email id
7. Username : Username should be in this form: text@text.text
8. Nick Name : Give a Nickname
9. Role : Gold Smith
10. User licence : Salesforce
11. Profiles : Gold Smith

Save it.

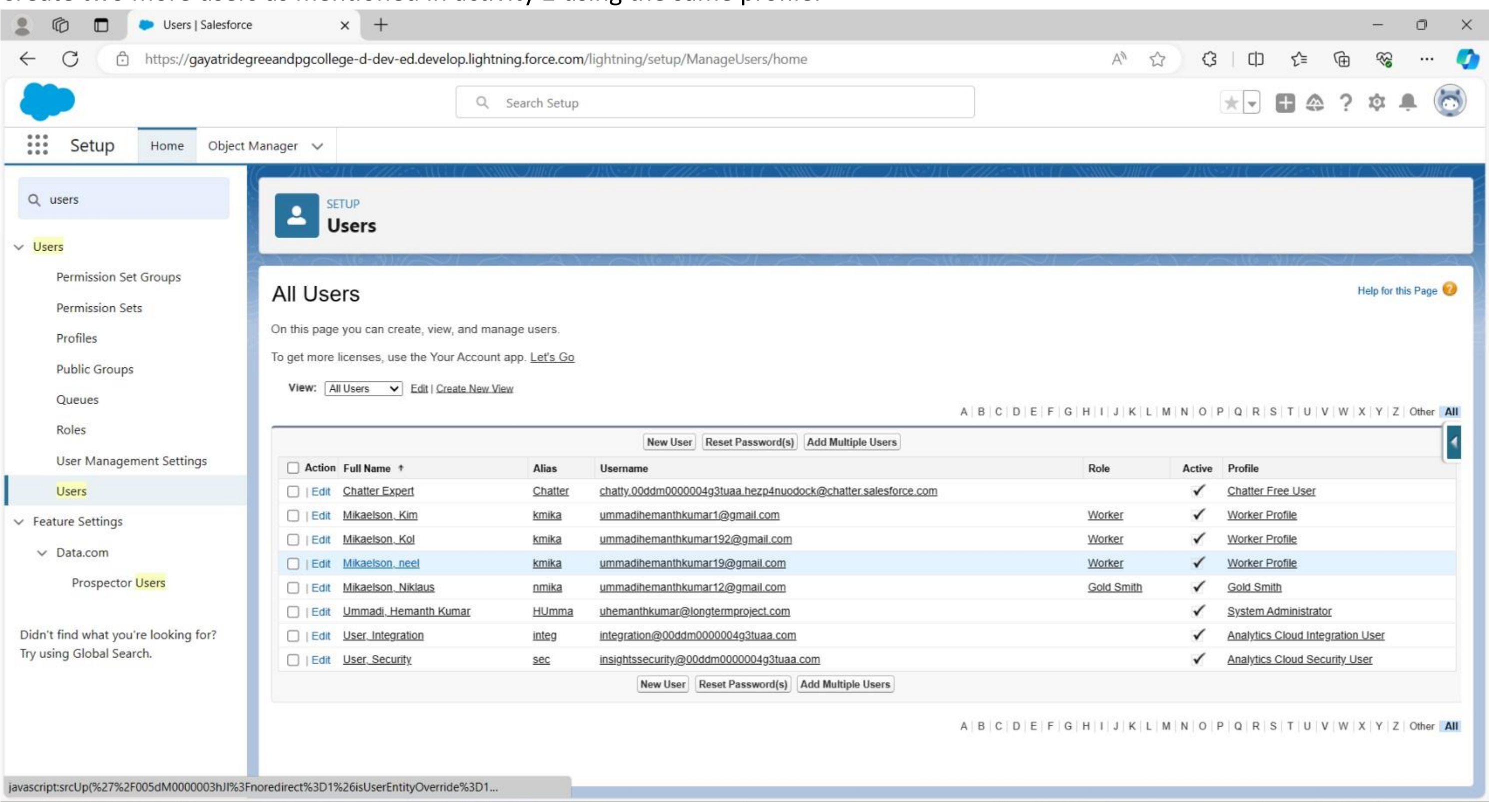
Activity 2: creating another users

1. Go to setup -type users in quick find box - select users -click New user.

2. Fill in the fields
3. First Name : Kol
4. Last Name : Mikaelson
5. Alias : Give a Alias Name
6. Email id : Give your Personal Email id
7. Username : Username should be in this form: text@text.text
8. Nick Name : Give a Nickname
9. Role : Worker
10. User licence : Salesforce Platform 11. Profiles : Worker
12. Save.

Note:

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



Milestone – 9: Page Layout

To create a page layout for Gold

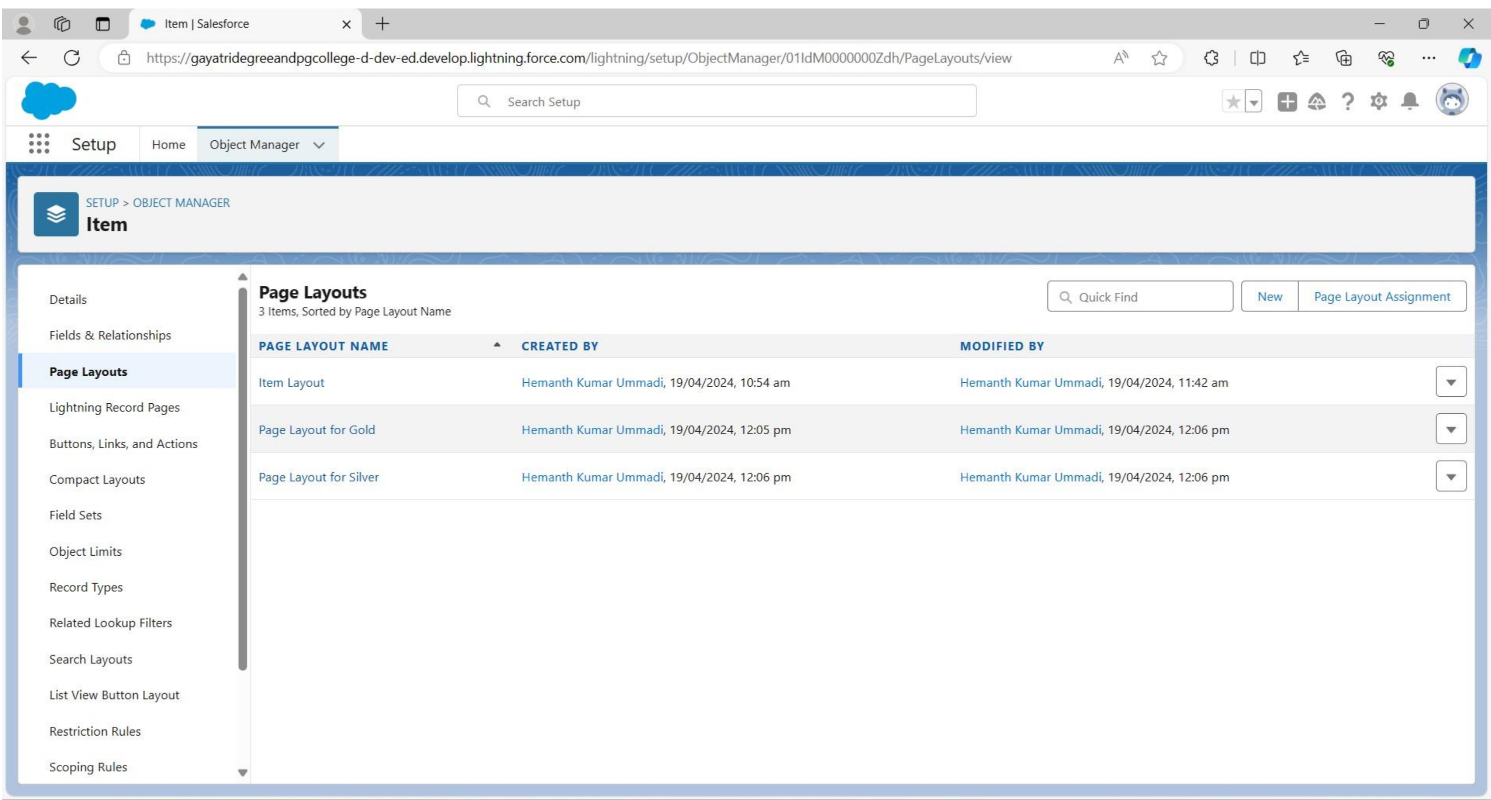
1. Go to setup, click on object manager search for item object click on it
2. Select page layout option in item object
3. Click on new
4. Page layout name: Page layout for Gold

5. Click on save
6. Remove the fields related to silver
7. Click ok and save it

To create a page layout for Silver

1. Go to setup, click on object manager search for item object click on it

2. Select page layout option in item object
3. Click on new
4. Page layout name: Page layout for Silver
5. Click on save
6. Remove the fields related to Gold
7. Click ok and save it



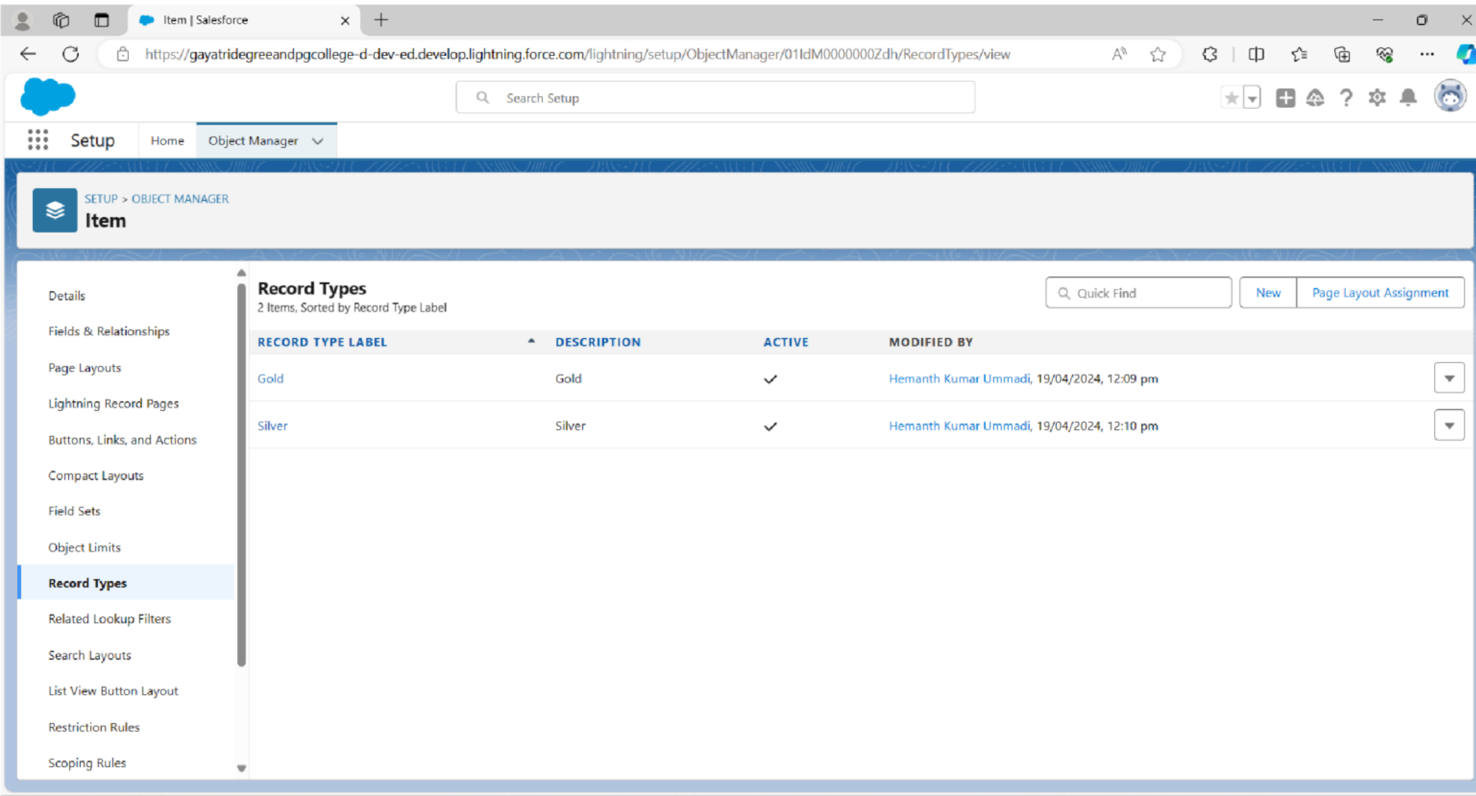
Milestone-10: Record Types

1. Go to setup, click on object manager, search for Item object click on it
2. In item object click on Record Types
3. Click on new
4. Existing Record: Master

5. Label: Gold
6. Description: Gold items information
7. Uncheck for “Make Available”
8. Scroll down and check for the Gold Smith, Worker & System Administrator profile and click on Next.
9. 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.

Create Silver Record Type

1. Go to setup, click on object manager, search for Item object click on it
2. In item object click on Record Types

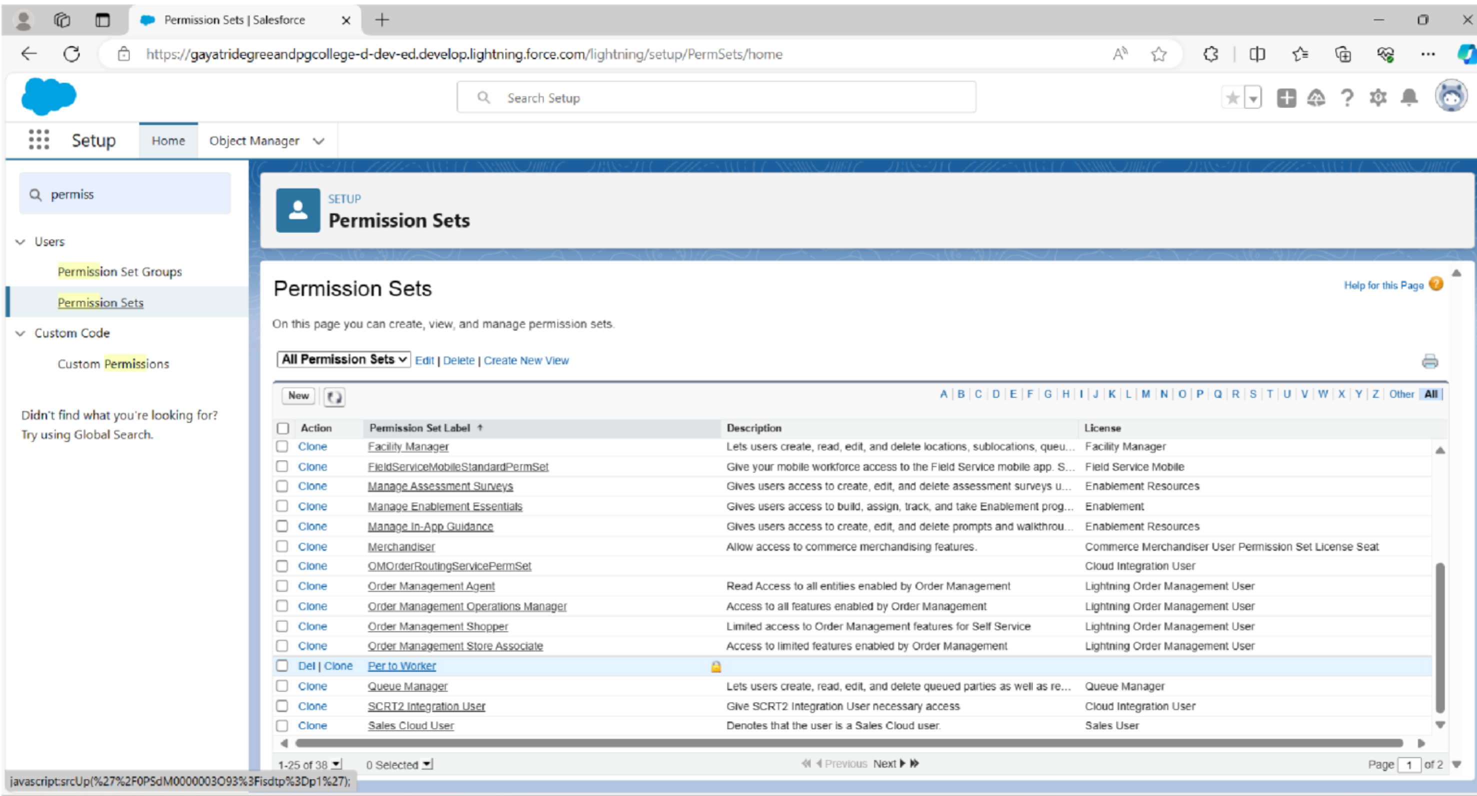


3. Click on new
4. Existing Record: Master
5. Label: Gold
6. Description: Gold items information
7. Uncheck for “Make Available”
8. Scroll down and check for the Gold Smith, Worker & System Administrator profile and click on Next.
9. Select “Apply a different layout for each profile”, and change page layout to “Page Layout for Gold“ for Gold Smith, Worker and System Administrator >> save & new.

Milestone-11: Permission Sets

1. Go to setup click on home tab

2. Search for permission sets click on it
3. Click on new
4. Label: Per to Worker
5. Click on save
6. Scroll down to object settings click on it



7. Select item object
8. Click edit
9. under Item: Record Type Assignments, enable Gold, Silver
10. Object permission check for read ,edit and create.
11. Click save
12. After saving click on Manage Assignments
13. Now click on add assignments
14. Select the users that has created earlier with worker profile 15. Click on assign and done

Milestone-12: User Adoption

Create a record (Jewel Customer)

1. In app launcher search for Jewelry inventory system click on it
2. Click on drop down click jewel customer tab
3. Click on new
4. Fill the details and save it

View a record (Jewel Customer)

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

Delete a record (Jewel Customer)

1. Click on App Launcher on the left side of the screen.
2. Search Jewelry Inventory System & click on it.
3. Click on the Jewel Customer Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete.

Note: Create at least 10 records for each of the objects: Jewel Customer, Price, Item, Customer Order and Billing.

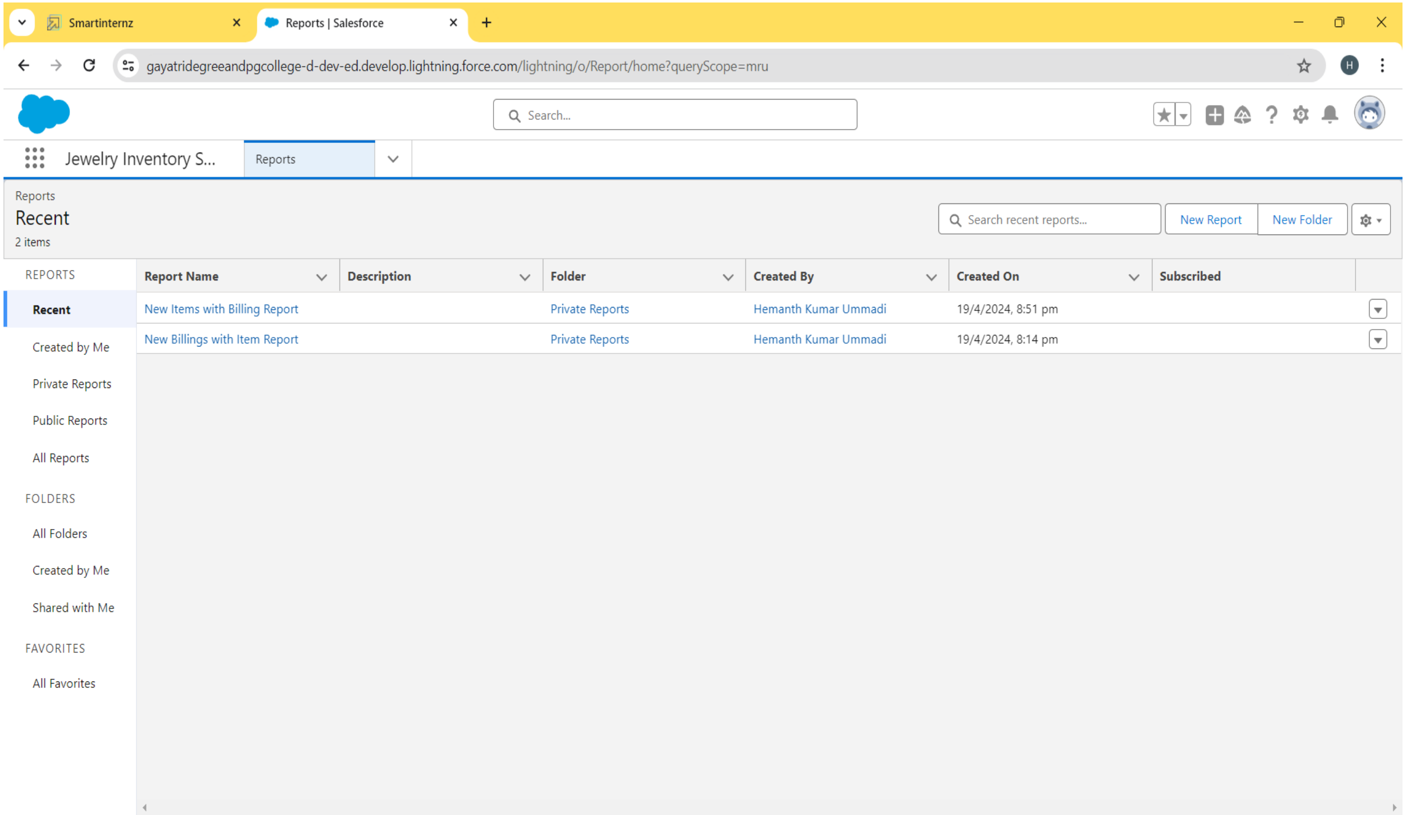
Milestone-13: Reports

Create a Report

1. In app launcher search for reports click on it
2. Click on new report
3. Select items with billings
4. Click on stat report
5. Save and run

Create another Report

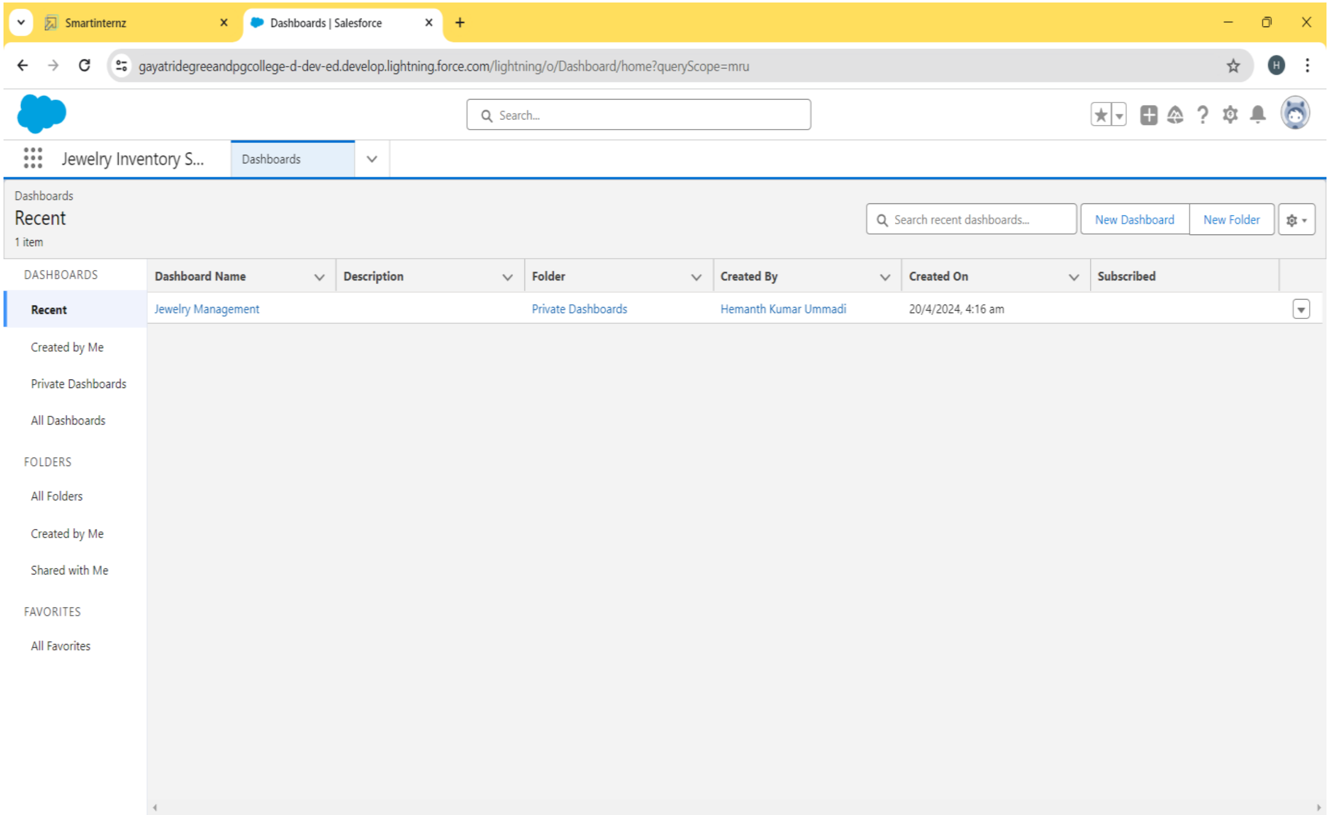
1. In app launcher search for reports click on it
2. Click on new report
3. Select billings with items
4. Click on stat report
5. Save and run



Milestone-14: Dashboards

Create a dashboards

1. In app launcher search for dashboards click on it
2. Click on new dashboards
3. Give a name to it
4. Add the component
5. Select the report
6. Click save and done

7. 

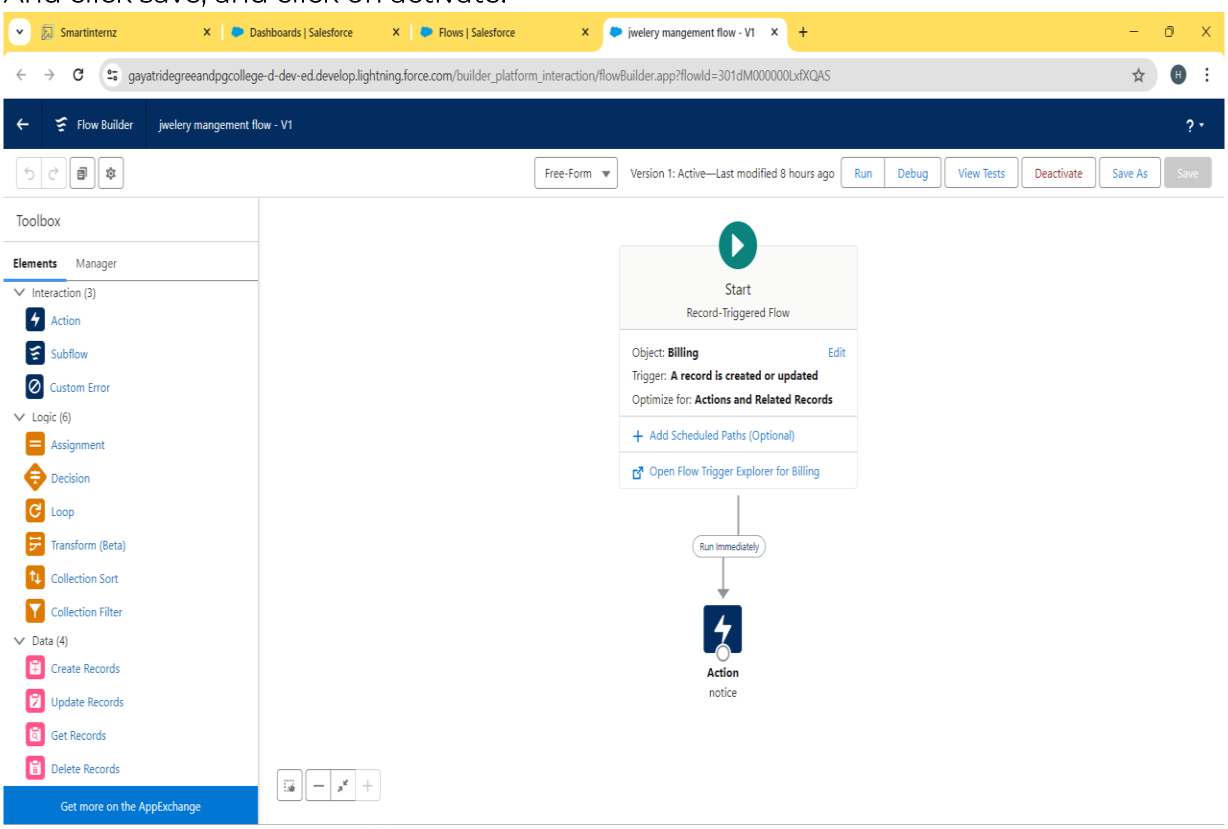
Milestoner-15: Flows

Create a flow

1. In setup gear click on home tab
2. Search for flows in quick find box
3. Select flows
4. Click on new flows
5. Select Record triggered flow
6. Select the Object as a “Billing” in the Drop down list.
7. Select the Trigger Flow when: “A record is Created or Updated”.
8. Select the Optimize the flow for: “Actions and Related Records” and Click on Done.
9. Now change the mode form Auto-layout to free-form.
10. Now select the manger option in the toolbox, click New resource.
11. Select the resource type as text template.
12. Enter the API name as “ Email body”.
13. Change the view as Rich Text ? View to Plain Text.
14. In the body field paste the syntax that is given below.
    Hello
    Customer Name: {!$Record.Item__r.Customer_Name__r.Name}
    Here are the details for the item you purchased with Jewelry Inventory SystemItem Type:
    {!$Record.Item__r.Item_Type__c}
    Ornament: {!$Record.Ornament__c}

Weight: {!$Record.Weight__c}grams
Amount: {!$Record.Amount__c}

15. Click done.
16. Now click on elements, and drag the action element into the preview pane.
17. Their action bar will be opened in that search for “ send email ” and click on it.
18. Give the label name as “ notice”
19. API name will be auto populated.
20. Enable the body in set input values for the selected action
21. Select the text template that was created.
22. Include Recipient Address list, select the email form the record.({!$Record.Item_r.Customer_Namer.Email_c})
23. Include the subject as “Welcome to Jewelry Inventory System ”.
24. Click done
25. Now drag the path from the start to the action element.
26. Click on save. Given the Flow label , Flow Api name will be auto populated.
27. And click save, and click on activate.



The End