

# Project Report on

## CRM Application For Jewel Management - (Admin)

### (DEVELOPER) - (Long-Term)

**Milestone – 01:** Create Salesforce Org Goto

[developers.salesforce.com/Signup](https://developer.salesforce.com/signup)

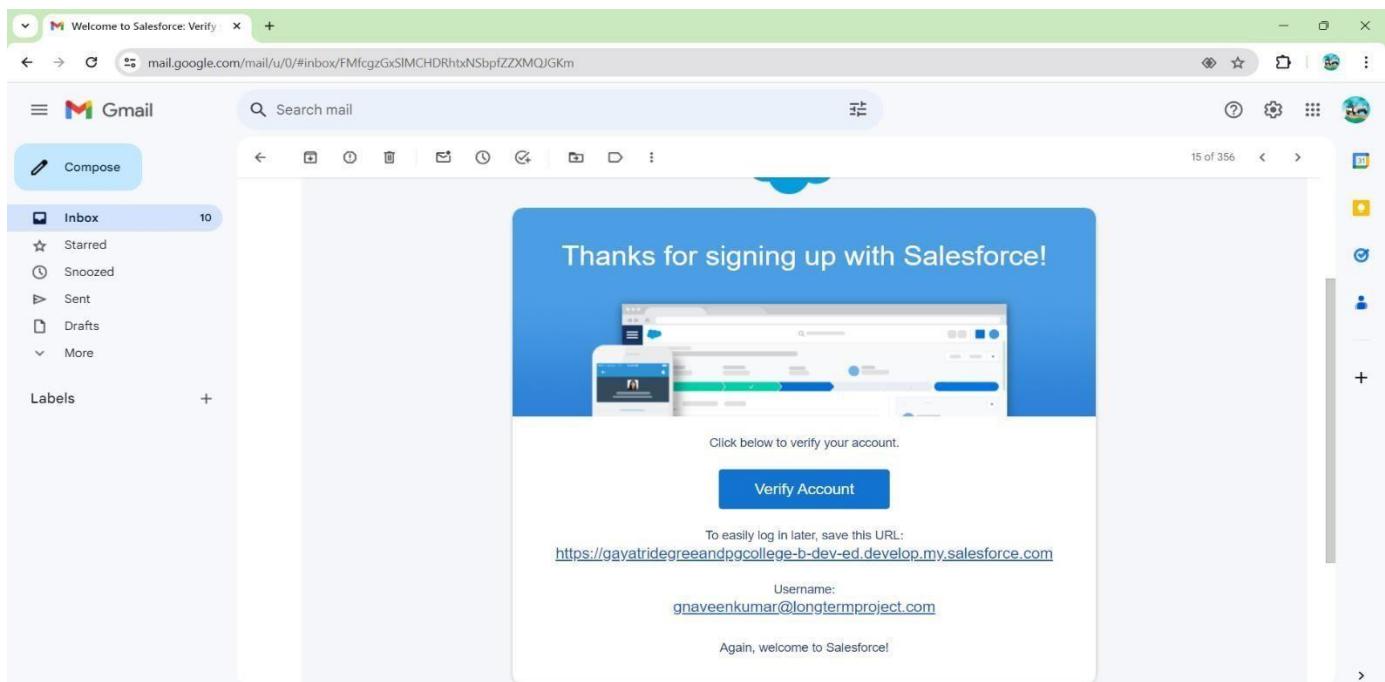
Click on sign up.

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

1. First name & Last name – G NAVEEN KUMAR
2. Email –gnaveenkumarnaveen520@gmail.com
3. Role: **Developer**
4. Company: GAYATRI DEGREE COLLEGE - TIRUPATI
5. County: India
6. Postal Code: 517501
7. Username: **gnaveenkumar@longtermproject.com**

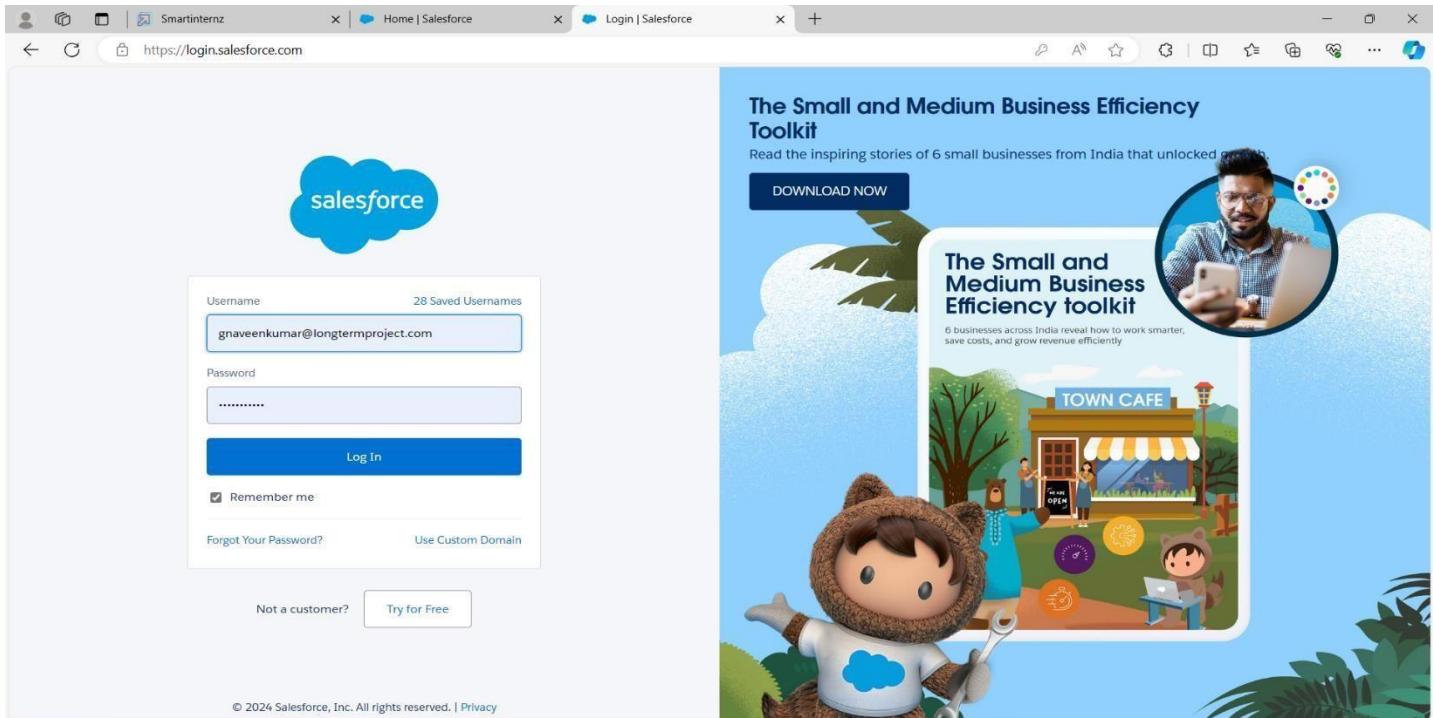
#### Account Activation

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.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. On the left, a sidebar lists various configuration options like Fields & Relationships, Page Layouts, and Record Types. The main 'Details' section shows the API Name as 'Item\_c'. Under the 'Custom' section, the Singular Label is set to 'Item' and the Plural Label is set to 'Items'. To the right, there are sections for Enable Reports, Track Activities, Track Field History, Deployment Status (set to 'Deployed'), and Help Settings (linking to the Standard salesforce.com Help Window). At the top right of the main area are 'Edit' and 'Delete' buttons.

## 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.

The screenshot shows the Salesforce Object Manager interface. The left sidebar has a 'Fields & Relationships' tab selected. The main area displays a table titled 'Fields & Relationships' with 6 items, sorted by Field Label. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

| FIELD LABEL      | FIELD NAME       | DATA TYPE              | CONTROLLING FIELD | INDEXED |
|------------------|------------------|------------------------|-------------------|---------|
| Created By       | CreatedById      | Lookup(User)           |                   |         |
| Customer         | Customer__c      | Lookup(Jewel Customer) |                   | ✓       |
| Customer Id      | Name             | Auto Number            |                   | ✓       |
| Item             | Item__c          | Master-Detail(Item)    |                   | ✓       |
| Last Modified By | LastModifiedById | Lookup(User)           |                   |         |
| Order Status     | Order_Status__c  | Picklist               |                   |         |

## 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.

The screenshot shows the Salesforce Setup interface for managing objects. The URL in the browser is https://gayatridegreeandpgcollege-b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lIR000001hXv/Details/view. The page title is "Price". On the left, there's a sidebar with tabs: "Setup", "Home", and "Object Manager". Under "Object Manager", the "Price" object is selected. The main content area has a "Details" tab selected. On the left, there's a list of configuration items: "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", and "Scoping Rules". On the right, the "Details" tab shows the following fields:

- Description: (empty)
- API Name: Price\_c
- Custom: ✓
- Singular Label: Price
- Plural Label: Price
- Enable Reports: ✓
- Track Activities: (unchecked)
- Track Field History: (unchecked)
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

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.

The screenshot shows the Salesforce Object Manager Details page for the 'Billing' object. The URL in the browser is <https://gayantridegreeandpgcollege-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lR000001hHxa/Details/view>. The page title is 'Billing | Salesforce'. The left sidebar lists various configuration tabs: 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, and Scoping Rules. The main content area is titled 'Details' and contains the following fields:

|                           |                         |                               |  |
|---------------------------|-------------------------|-------------------------------|--|
| Description               | API Name<br>Billing_c   | Custom<br>✓                   | Enable Reports<br>✓                                  |
| Singular Label<br>Billing | Plural Label<br>Billing | Track Activities              | Track Field History                                  |
|                           |                         | Deployment Status<br>Deployed | Help Settings<br>Standard salesforce.com Help Window |

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 Cutstomer.
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

| Action     | Label           | Tab Style | Description |
|------------|-----------------|-----------|-------------|
| Edit   Del | Billing         | Balls     |             |
| Edit   Del | Customer Orders | Caduceus  |             |
| Edit   Del | Items           | CD/DVD    |             |
| Edit   Del | Jewel Customers | Big top   |             |
| Edit   Del | Price           | Boat      |             |

### 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.

**App Details & Branding**

App Name: Jewelry Inventory System

Developer Name: Jewelry\_Inventory\_System

Description: Elevate your look with elegance

Primary Color Hex Value: #0070D2

App Launcher Preview:

**Navigation Items**

Available Items:

- Accounts
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions
- Asset State Periods

Selected Items:

- Jewel Customers
- Items
- Customer Orders
- Price
- Billing
- Reports
- Dashboards

## **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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for Setup, Home, and Object Manager. The main title is "Customer Order". On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Fields & Relationships (which is currently selected). The main content area is titled "Fields & Relationships" and displays a table of fields for the Customer Order object. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The listed fields are:

| FIELD LABEL      | FIELD NAME     | DATA TYPE              | CONTROLLING FIELD | INDEXED |
|------------------|----------------|------------------------|-------------------|---------|
| Created By       | CreatedBy      | Lookup(User)           |                   |         |
| Customer         | Customer_c     | Lookup(Jewel Customer) |                   | ✓       |
| Customer Id      | Name           | Auto Number            |                   | ✓       |
| Item             | Item_c         | Master-Detail(Item)    |                   | ✓       |
| Last Modified By | LastModifiedBy | Lookup(User)           |                   |         |
| Order Status     | Order_Status_c | Picklist               |                   |         |

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.

The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Smartinternz, Jewel Customer | Salesforce
- Search Bar:** Search Setup
- Navigation:** Setup, Home, Object Manager
- Section:** SETUP > OBJECT MANAGER
- Object:** Jewel Customer
- Table:** Fields & Relationships (13 items, Sorted by Field Label)
- Columns:** FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, INDEXED
- Data:** A list of fields including City, Country, Created By, Customer Name, Email, Item Type, Last Modified By, Owner, Phone, and Purity.

| FIELD LABEL      | FIELD NAME       | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| City             | City_c           | Text(20)           |                   |         |
| Country          | Country_c        | Text(18)           |                   |         |
| Created By       | CreatedById      | Lookup(User)       |                   |         |
| Customer Name    | Name             | Text(80)           |                   | ✓       |
| Email            | Email_c          | Email              |                   |         |
| Item Type        | Item_Type_c      | Picklist           |                   |         |
| Last Modified By | LastModifiedById | Lookup(User)       |                   |         |
| Owner            | OwnerId          | Lookup(User,Group) |                   | ✓       |
| Phone            | Phone_c          | Phone              |                   |         |
| Purity           | Purity_c         | Number(2, 0)       |                   |         |

## **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

Smartinternz

Item | Salesforce

<https://gayatridegreeandpgcollege-b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IIR000001hHxL/FieldsAndRelationships/view>

Setup Home Object Manager

SETUP > OBJECT MANAGER Item

Details Fields & Relationships

Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Restriction Rules Scoping Rules Triggers Flow Triggers

Fields & Relationships 23 Items, Sorted by Field Label

| FIELD LABEL             | FIELD NAME                | DATA TYPE              | CONTROLLING FIELD | INDEXED |
|-------------------------|---------------------------|------------------------|-------------------|---------|
| Amount                  | Amount_c                  | Formula (Currency)     |                   |         |
| Created By              | CreatedById               | Lookup(User)           |                   |         |
| Customer Name           | Customer_Name_c           | Lookup(Jewel Customer) |                   | ✓       |
| Expected Days Of Return | Expected_Days_Of_Return_c | Picklist               | Priority          |         |
| Gold Price              | Gold_Price_c              | Formula (Currency)     |                   |         |
| Item Id                 | Name                      | Auto Number            |                   | ✓       |
| Item Type               | Item_Type_c               | Picklist               |                   |         |
| KDM                     | KDM_c                     | Formula (Currency)     |                   |         |
| Last Modified By        | LastModifiedById          | Lookup(User)           |                   |         |
| Making Charges          | Making_Charges_c          | Formula (Currency)     |                   |         |

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.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for Smartinternz, Price | Salesforce, and a search bar. Below the navigation is a header with a cloud icon, 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'SETUP > OBJECT MANAGER' and 'Price'. On the left, a sidebar lists various setup options under 'Fields & Relationships'. The main pane is titled 'Fields & Relationships' and displays a table of fields for the 'Price' object. The table columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The listed fields are:

| FIELD LABEL      | FIELD NAME       | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Created By       | CreatedById      | Lookup(User)       |                   |         |
| Gold Price       | Gold_Price__c    | Currency(8, 5)     |                   |         |
| Last Modified By | LastModifiedById | Lookup(User)       |                   |         |
| Owner            | OwnerId          | Lookup(User,Group) |                   | ✓       |
| Price Id         | Name             | Auto Number        |                   | ✓       |
| Silver Price     | Silver_Price__c  | Currency(8, 5)     |                   |         |

## 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                         | <p>Item</p> <table border="1"> <tr> <td data-bbox="246 192 670 312">Field Label:Customer Name</td><td data-bbox="670 192 1392 312">Lookup Relationship with Jewel Customer Object</td></tr> <tr> <td data-bbox="246 312 670 508">Ornament</td><td data-bbox="670 312 1392 508">Text(20)</td></tr> <tr> <td data-bbox="246 508 670 656">Weight</td><td data-bbox="670 508 1392 656">Number (Length=8,Decimal=5)</td></tr> <tr> <td data-bbox="246 656 670 819">Stone Weight</td><td data-bbox="670 656 1392 819">Number (Length=5,Decimal=5)</td></tr> <tr> <td data-bbox="246 819 670 960">Percentage</td><td data-bbox="670 819 1392 960">Number (Length=2,Decimal=0)</td></tr> <tr> <td data-bbox="246 960 670 1125">Stone/Other Price</td><td data-bbox="670 960 1392 1125">Currency (Length=8,Decimal=2)</td></tr> </table> | 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) |
| 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)   |                           |  |          |          |        |                             |              |                             |            |                             |                   |                               |
|                           |   |                           |  |          |          |        |                             |              |                             |            |                             |                   |                               |

|                   |  |  |
|-------------------|--|--|
|                   |  | <div style="border: 1px solid black; padding: 5px; text-align: center;">           1-3 Days<br/>           4-5 Days<br/>           6-7 Days<br/>           8-10 Days         </div>  |
| Priority          | Picklist   | <div style="border: 1px solid black; padding: 5px; text-align: center;">           Low<br/>           Medium<br/>           High<br/>           Critical         </div>  |
| Silver Price      | Formula<br>(Return Type:Number)<br>(Decimal=3)   | <div style="border: 1px solid black; padding: 5px; text-align: center;"> <math display="block">(\text{Prices\_r.Silver\_price\_c} / 1000)</math> </div>  |
| Purity Gold Price | Formula<br>(Return Type:Currency)<br>(Decimal=2) | <div style="border: 1px solid black; padding: 5px; text-align: center;"> <math display="block">((\text{Prices\_r.Gold\_price\_c} * \text{Purity\_c}) / 24) / 10</math> </div>  |
| Total Weight      | Formula<br>(Return Type:Number)<br>(Decimal=3)   | <div style="border: 1px solid black; padding: 5px; text-align: center;"> <math display="block">(\text{Weight\_c} - \text{Stone_weight\_c})</math> </div>   |
| Amount            | Formula<br>(Return Type:Currency)<br>(Decimal=3) | <div style="border: 1px solid black; padding: 5px; text-align: center;"> <math display="block">\text{IF}(\text{ISPICKVAL( Item_Type\_c } , \text{"Gold"}), \text{Total_weight\_c} * \text{Purity_Gold_price\_c} , \text{Total_weight\_c} * \text{Silver_price\_c})</math> </div> |
| KDM               | Formula<br>(Return Type:Currency)<br>(Decimal=0) |  |

|  |                |   |
|--|----------------|---|
|  |                | $(Amount\_c * Percentage\_c) / 100$   |
|  | Making Charges | <p>Formula<br/>         (Return Type:Currency)<br/>         (Decimal=0)</p> <pre>IF(ISPICKVAL(     Item_Type__c    , "Gold"), Weight__c * 300    , Weight__c * 10 )</pre> |

|               |                |   |         |             |         |           |               |          |
|---------------|----------------|---|---------|-------------|---------|-----------|---------------|----------|
| 4             | Customer Order | <p>Order Status</p> <table border="1"> <tr><td>Started</td></tr> <tr><td>Not Started</td></tr> <tr><td>On Hold</td></tr> <tr><td>Completed</td></tr> <tr><td>Not Completed</td></tr> </table> | Started | Not Started | On Hold | Completed | Not Completed | Picklist |
| Started       |                |   |         |             |         |           |               |          |
| Not Started   |                |   |         |             |         |           |               |          |
| On Hold       |                |   |         |             |         |           |               |          |
| Completed     |                |   |         |             |         |           |               |          |
| Not Completed |                |   |         |             |         |           |               |          |

|                  |   |  |                  |                                      |          |   |              |   |        |   |
|------------------|---|--|------------------|--------------------------------------|----------|---|--------------|---|--------|---|
| 5                | Billing   | <table border="1" data-bbox="266 196 1568 1127"> <tr> <td data-bbox="266 196 470 318">Field Label:Item</td><td data-bbox="470 196 1568 318">Lookup Relationship with Item Object</td></tr> <tr> <td data-bbox="266 318 470 566">Ornament</td><td data-bbox="470 318 1568 566"> <p>Formula (Return Type:Text)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item__r.Ornament__c</div> </td></tr> <tr> <td data-bbox="266 566 470 846">Stone weight</td><td data-bbox="470 566 1568 846"> <p>Formula (Return Type:Number) (Decimal=2)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item__r.Stone_weight__c</div> </td></tr> <tr> <td data-bbox="266 846 470 1127">Weight</td><td data-bbox="470 846 1568 1127"> <p>Formula<br/>Return Type:Number<br/>(Decimal=2)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item__r.Total_weight__c</div> </td></tr> </table> | Field Label:Item | Lookup Relationship with Item Object | Ornament | <p>Formula (Return Type:Text)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item__r.Ornament__c</div> | Stone weight | <p>Formula (Return Type:Number) (Decimal=2)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item__r.Stone_weight__c</div> | Weight | <p>Formula<br/>Return Type:Number<br/>(Decimal=2)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item__r.Total_weight__c</div> |
| Field Label:Item | Lookup Relationship with Item Object  |  |                  |                                      |          |   |              |   |        |   |
| Ornament         | <p>Formula (Return Type:Text)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item__r.Ornament__c</div>                         |  |                  |                                      |          |   |              |   |        |   |
| Stone weight     | <p>Formula (Return Type:Number) (Decimal=2)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item__r.Stone_weight__c</div>       |  |                  |                                      |          |   |              |   |        |   |
| Weight           | <p>Formula<br/>Return Type:Number<br/>(Decimal=2)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item__r.Total_weight__c</div> |  |                  |                                      |          |   |              |   |        |   |

|                    |   |   |
|--------------------|---|---|
|                    | Amount<br><br>(Return Type:Currency)  | Formula<br><br>(Decimal=2)<br>Item_r.Amount_c |
| Gold/Silver Price  | Formula<br><br>(Return Type:Currency)<br><br>(Decimal=2)<br><br>IF(ISPICKVAL( Item_r.Item_Type_c , "Gold"), Item_r.Gold_price_c , Item_r.Silver_price_c ) |   |
| KDM Charge         | Formula<br><br>(Return Type:Currency)<br><br>(Decimal=0)<br>Item_r.KDM_c  |   |
| Making Charges     | Formula<br><br>(Return Type:Currency)<br><br>(Decimal=2)<br>Item_r.Making_Charges_c   |   |
| Stones/other price | Formula<br><br>(Return Type:Currency)<br><br>(Decimal=2)<br>Item_r.Stone_other_price_c  |   |
| Total Amount       | Formula<br><br>(Return Type:Currency)<br><br>(Decimal=0)<br><br>Amount_c +<br>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.

The screenshot shows the Salesforce Object Manager interface for the 'Jewel Customer' object. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Validation Rules' and displays two items:

| RULE NAME                              | ERROR LOCATION  | ERROR MESSAGE               | ACTIVE | MODIFIED BY                         |
|--|-----------------|-----------------------------|--------|-------------------------------------|
| Postal_Code                            | Zip/Postal code | Must contain 6 digits       | ✓      | G NAVEEN KUMAR, 12/04/2024, 8:41 pm |
| ValidationRule_For_JewelCustomerObject | Top of Page     | Please fill Required fields | ✓      | G NAVEEN KUMAR, 12/04/2024, 8:42 pm |

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.

The screenshot shows the Salesforce Object Manager interface for the 'Item' object. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main content area is titled 'Validation Rules' and shows one item: 'ValidationRule\_For\_Item' located at 'Top of Page' with the error message 'Please fill Required fields'. The status is 'ACTIVE' and it was modified by 'G NAVEEN KUMAR' on '12/04/2024, 8:43 pm'.

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.

The screenshot shows the Salesforce Profiles page. The search bar contains 'prof'. The 'Profiles' tab is selected. The main table lists various profiles with columns for Action, Profile Name, User License, and Status. The 'User License' column includes options like Salesforce, Customer Community Login, Customer Community Plus Login, Customer Portal Manager Custom, Customer Portal Manager Standard, External Apps Login, External Identity, Force.com - App Subscription, Force.com - Free, Gold Partner, and SalesForce. The 'Status' column indicates which profiles have access granted (checked boxes).

| Action                   | Profile Name                       | User License                     | Status                              |
|--------------------------|------------------------------------|----------------------------------|-------------------------------------|
| <input type="checkbox"/> | Custom: Sales Profile              | Salesforce                       | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | Custom: Support Profile            | Salesforce                       | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | Customer Community Login User      | Customer Community Login         | <input type="checkbox"/>            |
| <input type="checkbox"/> | Customer Community Plus Login User | Customer Community Plus Login    | <input type="checkbox"/>            |
| <input type="checkbox"/> | Customer Community Plus User       | Customer Community Plus          | <input type="checkbox"/>            |
| <input type="checkbox"/> | Customer Community User            | Customer Community               | <input type="checkbox"/>            |
| <input type="checkbox"/> | Customer Portal Manager Custom     | Customer Portal Manager Custom   | <input type="checkbox"/>            |
| <input type="checkbox"/> | Customer Portal Manager Standard   | Customer Portal Manager Standard | <input type="checkbox"/>            |
| <input type="checkbox"/> | External Apps Login User           | External Apps Login              | <input type="checkbox"/>            |
| <input type="checkbox"/> | External Identity User             | External Identity                | <input type="checkbox"/>            |
| <input type="checkbox"/> | Force.com - App Subscription User  | Force.com - App Subscription     | <input type="checkbox"/>            |
| <input type="checkbox"/> | Force.com - Free User              | Force.com - Free                 | <input type="checkbox"/>            |
| <input type="checkbox"/> | Gold Partner User                  | Gold Partner                     | <input type="checkbox"/>            |
| <input type="checkbox"/> | Gold Smith                         | SalesForce                       | <input checked="" type="checkbox"/> |

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.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The main area displays a list of profiles. The 'Worker' profile is highlighted with a blue selection bar at the bottom. The list includes various profiles like Minimum Access - API Only Integrations, Minimum Access - Salesforce, Partner App Subscription User, etc. The 'User License' column indicates which license each profile uses, such as Salesforce Integration, Salesforce, Partner App Subscription, etc. The 'Action' column contains links for Edit, Clone, and Delete.

| Action                   | Profile Name                            | User License             | Custom                              |
|--------------------------|---|--------------------------|-------------------------------------|
| <input type="checkbox"/> | Minimum Access - API Only Integrations  | Salesforce Integration   | <input type="checkbox"/>            |
| <input type="checkbox"/> | Minimum Access - Salesforce             | Salesforce               | <input type="checkbox"/>            |
| <input type="checkbox"/> | Partner App Subscription User           | Partner App Subscription | <input type="checkbox"/>            |
| <input type="checkbox"/> | Partner Community Login User            | Partner Community Login  | <input type="checkbox"/>            |
| <input type="checkbox"/> | Partner Community User                  | Partner Community        | <input type="checkbox"/>            |
| <input type="checkbox"/> | Read Only                               | Salesforce               | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | Salesforce API Only System Integrations | Salesforce Integration   | <input type="checkbox"/>            |
| <input type="checkbox"/> | Silver Partner User                     | Silver Partner           | <input type="checkbox"/>            |
| <input type="checkbox"/> | Solution Manager                        | Salesforce               | <input type="checkbox"/>            |
| <input type="checkbox"/> | Standard Platform User                  | Salesforce Platform      | <input type="checkbox"/>            |
| <input type="checkbox"/> | Standard User                           | Salesforce               | <input type="checkbox"/>            |
| <input type="checkbox"/> | System Administrator                    | Salesforce               | <input type="checkbox"/>            |
| <input type="checkbox"/> | Work.com Only User                      | Work.com Only            | <input type="checkbox"/>            |
| <input type="checkbox"/> | Worker                                  | Salesforce Platform      | <input checked="" type="checkbox"/> |

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.

**Creating the Role Hierarchy**

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

**Your Organization's Role Hierarchy**

**Gayatri Degree and PG College**

- CEO
- CFO
- COO
- Gold Smith
- Worker

**SVP, Customer Service & Support**

- Customer Support, International
- Customer Support, North America
- Installation & Repair Services

**SVP, Human Resources**

**Help for this Page**

4. javascriptsrcUp(%27%2F00EIR00002Arms%3Fsetupid%3Droles%26isotp%3Dp1%27);

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.

**Creating the Role Hierarchy**

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

**Your Organization's Role Hierarchy**

**Gayatri Degree and PG College**

- CEO
- CFO
- COO
- Gold Smith
- Worker

**SVP, Customer Service & Support**

- Customer Support, International
- Customer Support, North America
- Installation & Repair Services

**SVP, Human Resources**

**Help for this Page**

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.

The screenshot shows the Salesforce Setup interface with the 'Users' object selected. The left sidebar includes links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and a 'Users' section which is currently active. The main content area is titled 'All Users' and contains a table of user records. The table columns are: Action, Full Name, Alias, Username, Role, Active, and Profile. A blue highlight is applied to the row for 'Mikaelson\_Niklaus' (Username: gnaiveenkumar), indicating it is the selected record.

| Action                   | Full Name         | Alias   | Username   | Role       | Active                              | Profile                          |
|--------------------------|-------------------|---------|--|------------|-------------------------------------|----------------------------------|
| <input type="checkbox"/> | Chatter_Expert    | Chatter | chatty.00dir000001u6s32aa.lleb7h0fglc@chatter.salesforce.com |            | <input checked="" type="checkbox"/> | Chatter Free User                |
| <input type="checkbox"/> | KUMAR_G_NAVEEN    | GKUMA   | gnaveenkumar@longtermproject.com                             |            | <input checked="" type="checkbox"/> | System Administrator             |
| <input type="checkbox"/> | Mikaelson_king    | kmika   | naveen12@gmail.com   | Worker     | <input checked="" type="checkbox"/> | Worker                           |
| <input type="checkbox"/> | Mikaelson_Kol     | nmika   | naveenkumarnaveen5@gmail.com                                 | Worker     | <input checked="" type="checkbox"/> | Worker                           |
| <input type="checkbox"/> | Mikaelson_neal    | nmika   | naveenkumar@gmail.com  | Worker     | <input checked="" type="checkbox"/> | Worker                           |
| <input type="checkbox"/> | Mikaelson_Niklaus | nmika   | gnaveenkumar.naveen@gmail.com                                | Gold Smith | <input checked="" type="checkbox"/> | Gold Smith                       |
| <input type="checkbox"/> | User_Integration  | integ   | integration@00dir000001u6s32aa.com                           |            | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <input type="checkbox"/> | User_Security     | sec     | insightssecurity@00dir000001u6s32aa.com                      |            | <input checked="" type="checkbox"/> | Analytics Cloud Security User    |

## 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

The screenshot shows the Salesforce Lightning Experience setup interface. The URL is https://gayatrigradeeandpgcollege-b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IIR000001hHxL/PageLayouts/view. The left sidebar has a 'Page Layouts' section selected. The main content area shows a table for 'Page Layouts' with the following data:

| PAGE LAYOUT NAME       | CREATED BY                           | MODIFIED BY                           |
|------------------------|--------------------------------------|---------------------------------------|
| Item Layout            | G NAVNEEN KUMAR, 12/04/2024, 1:11 pm | G NAVNEEN KUMAR, 12/04/2024, 5:34 pm  |
| Page Layout for Gold   | G NAVNEEN KUMAR, 12/04/2024, 8:59 pm | G NAVNEEN KUMAR, 19/04/2024, 10:31 am |
| Page Layout for Silver | G NAVNEEN KUMAR, 12/04/2024, 9:03 pm | G NAVNEEN KUMAR, 12/04/2024, 9:03 pm  |

## 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.

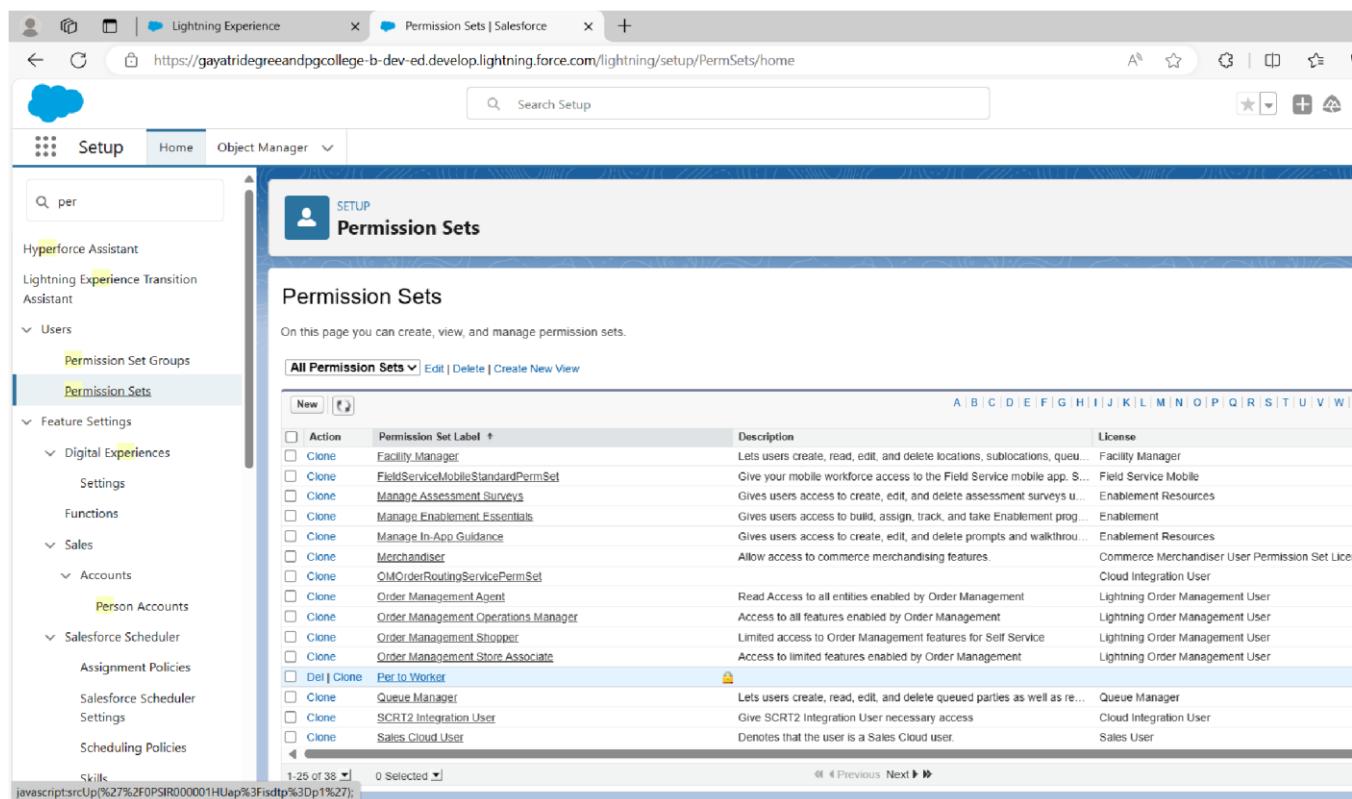
| RECORD TYPE LABEL | DESCRIPTION              | ACTIVE | MODIFIED BY                         |
|-------------------|--------------------------|--------|-------------------------------------|
| Gold              | Gold items information   | ✓      | G NAVEEN KUMAR, 19/04/2024, 3:07 pm |
| Silver            | Silver items information | ✓      | G NAVEEN KUMAR, 19/04/2024, 3:08 pm |

System Administrator >> save & new.

10.

## 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



The screenshot shows the Salesforce 'Permission Sets' page. The left sidebar has a 'Permission Sets' section selected. The main area displays a table of permission sets with columns for Action, Permission Set Label, Description, and License. The table includes rows for various roles like Facility Manager, Field Service Mobile, Enablement Resources, etc. A search bar at the top right is set to 'Search Setup'. The URL in the browser is https://gayatridegreeandpgcollege-b-dev-ed.lightning.force.com/lightning/setup/PermSets/home.

| Action                   | Permission Set Label | Description   | License   |
|--------------------------|----------------------|---|---|
| <input type="checkbox"/> | Clone                | Lets users create, read, edit, and delete locations, sublocations, que... | Facility Manager                                  |
| <input type="checkbox"/> | Clone                | Give your mobile workforce access to the Field Service mobile app. S...   | Field Service Mobile                              |
| <input type="checkbox"/> | Clone                | Gives users access to create, edit, and delete assessment surveys u...    | Enablement Resources                              |
| <input type="checkbox"/> | Clone                | Gives users access to build, assign, track, and take Enablement progr...  | Enablement  |
| <input type="checkbox"/> | Clone                | Gives users access to create, edit, and delete prompts and walkthrough... | Enablement Resources                              |
| <input type="checkbox"/> | Clone                | Allow access to commerce merchandising features.                          | Commerce Merchandiser User Permission Set License |
| <input type="checkbox"/> | Clone                | Read Access to all entities enabled by Order Management                   | Cloud Integration User                            |
| <input type="checkbox"/> | Clone                | Access to all features enabled by Order Management                        | Lightning Order Management User                   |
| <input type="checkbox"/> | Clone                | Limited access to Order Management features for Self Service              | Lightning Order Management User                   |
| <input type="checkbox"/> | Clone                | Access to limited features enabled by Order Management                    | Lightning Order Management User                   |
| <input type="checkbox"/> | Del   Clone          | Lets users create, read, edit, and delete queued parties as well as re... | Queue Manager                                     |
| <input type="checkbox"/> | Clone                | Give SCRT2 Integration User necessary access                              | Cloud Integration User                            |
| <input type="checkbox"/> | Clone                | Denotes that the user is a Sales Cloud user.                              | Sales User  |

14. Select the users that has created earlier with worker profile    15. Click on assign and done

16.

## 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

The screenshot shows the Salesforce Reports page. At the top, there are three tabs: 'Smartinternz' (active), 'Reports | Salesforce', and 'Object Manager | Salesforce'. The URL in the address bar is 'gayatridgegreeandpgcollege-b-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=mru'. Below the tabs, there's a search bar with placeholder text 'Search...'. On the left, a sidebar menu includes sections for 'Recent', 'Reports' (with sub-sections like 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports'), 'Folders' (with sub-sections like 'All Folders', 'Created by Me', 'Shared with Me'), and 'Favorites' (with sub-sections like 'All Favorites'). The main content area displays a table of recent reports:

| Report Name                   | Description     | Folder         | Created By         | Created On | Subscribed |
|-------------------------------|-----------------|----------------|--------------------|------------|------------|
| New Items with Billing Report | Private Reports | G NAVEEN KUMAR | 19/4/2024, 8:49 pm |            |            |
| New Billing with Item Report  | Private Reports | G NAVEEN KUMAR | 19/4/2024, 8:46 pm |            |            |

## 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

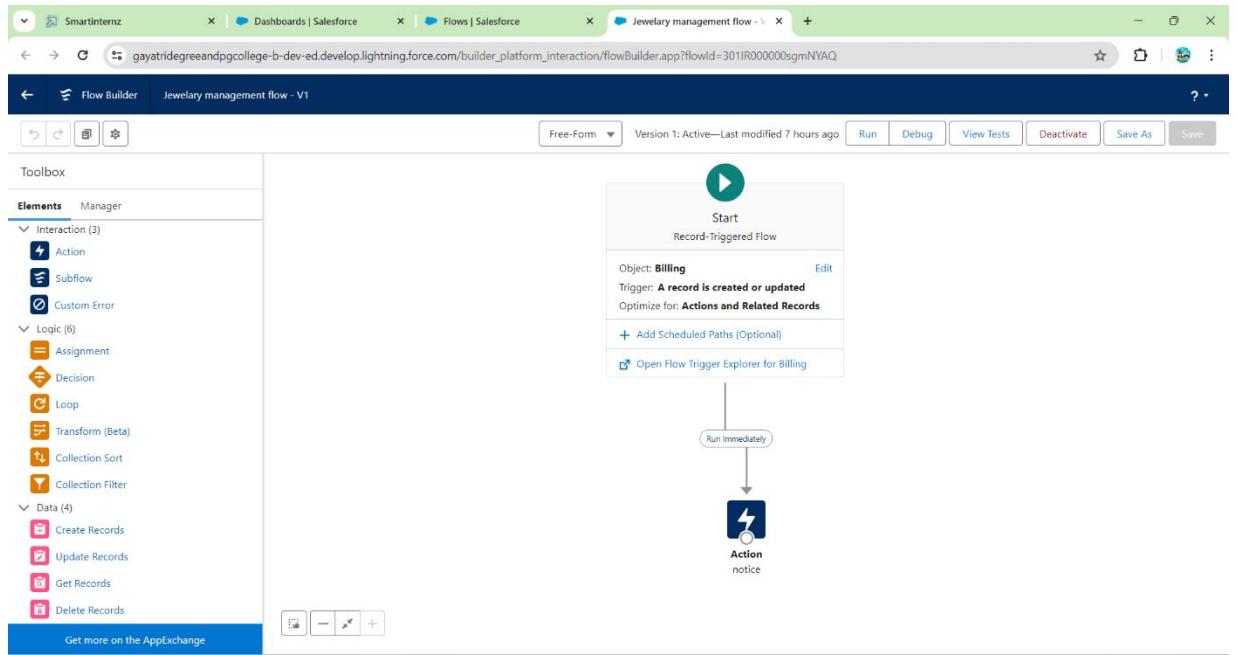
The screenshot shows the Salesforce Dashboards page. At the top, there are three tabs: 'Smartinternz' (active), 'Dashboards | Salesforce', and 'Object Manager | Salesforce'. The URL in the address bar is 'gayatridgegreeandpgcollege-b-dev-ed.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru'. Below the tabs, there's a search bar with placeholder text 'Search...'. On the left, a sidebar menu includes sections for 'Recent', 'Dashboards' (with sub-sections like 'Recent', 'Created by Me', 'Private Dashboards', and 'All Dashboards'), 'Folders' (with sub-sections like 'All Folders', 'Created by Me', 'Shared with Me'), and 'Favorites' (with sub-sections like 'All Favorites'). The main content area displays a table of recent dashboards:

| Dashboard Name     | Description        | Folder         | Created By         | Created On | Subscribed |
|--------------------|--------------------|----------------|--------------------|------------|------------|
| Jewelry management | Private Dashboards | G NAVEEN KUMAR | 19/4/2024, 9:08 pm |            |            |

## 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