

# Project Report on

## CRM Application For Jewel Management - (Admin)

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

**Milestone – 01:** Create Salesforce Org

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

Click on sign up.

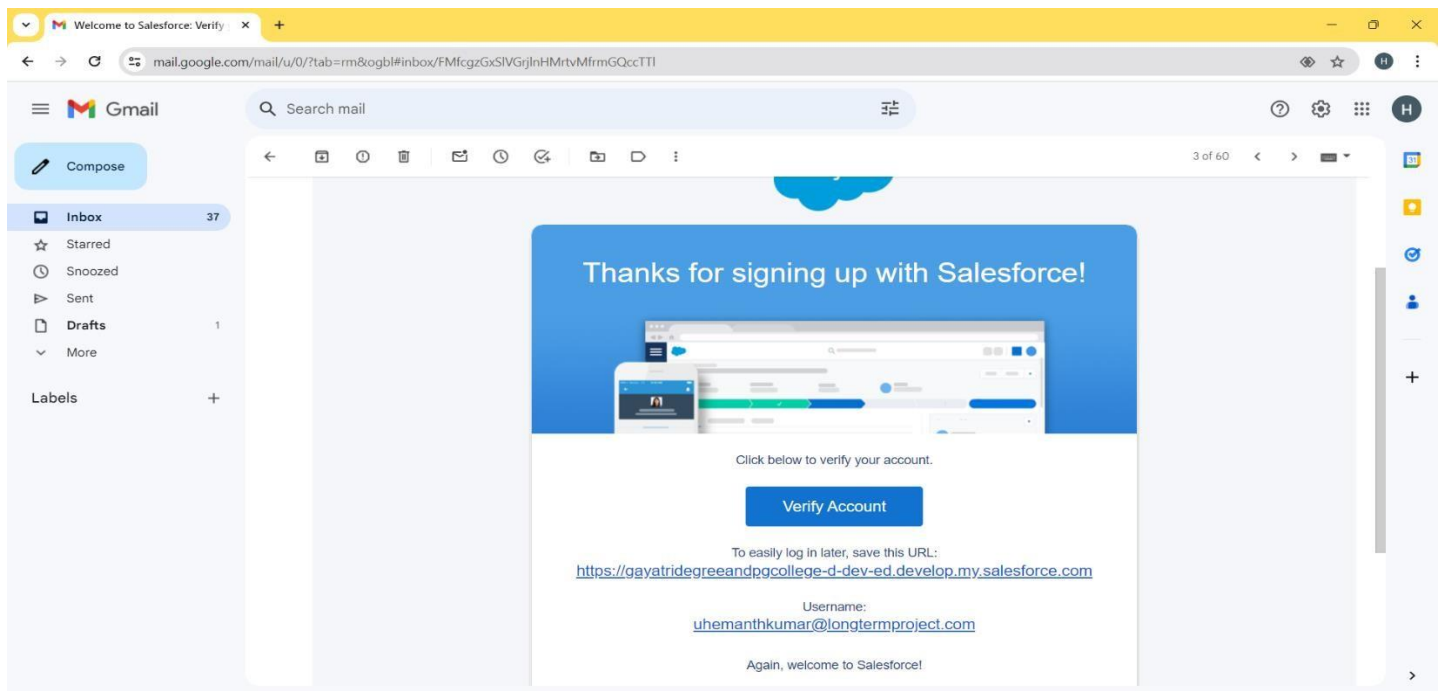
On the sign-up form, enter the following details:

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

### Account Activation

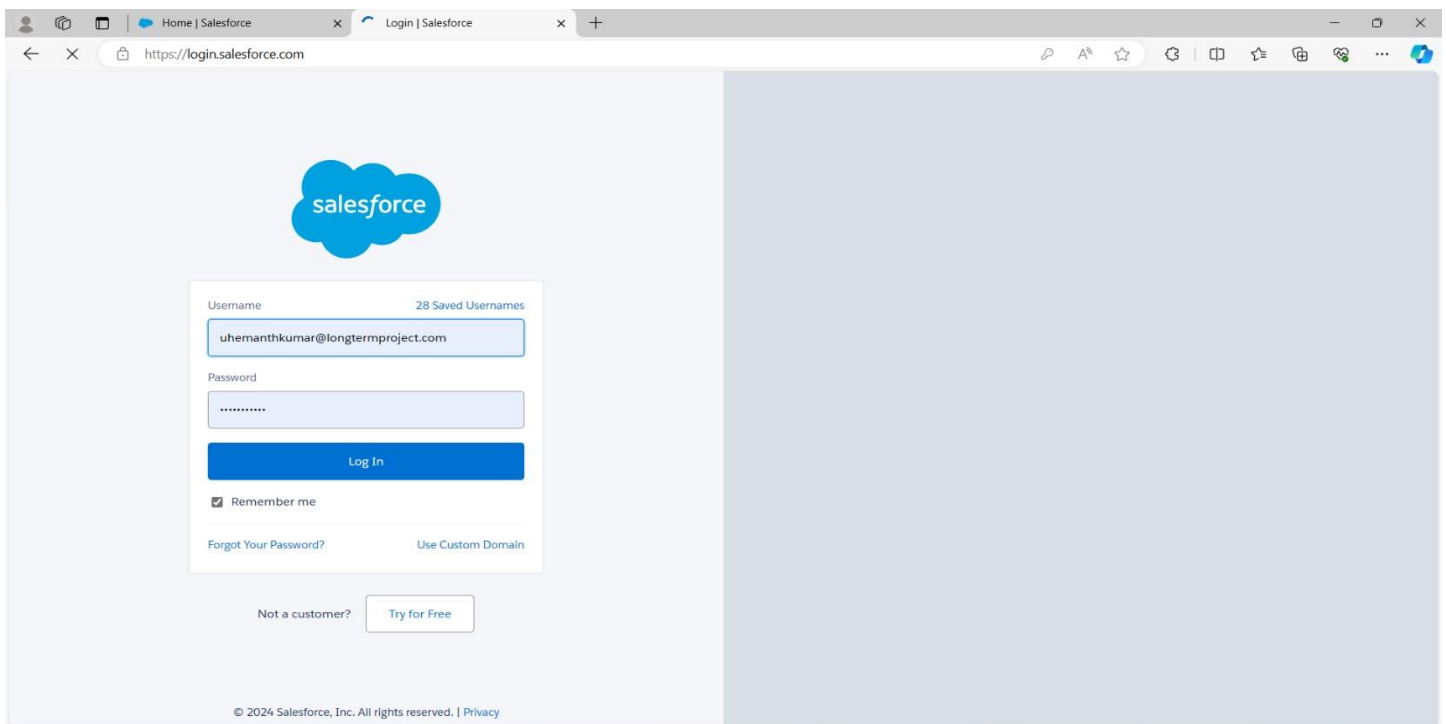
Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.

The email may take 5-10mins, as



## Login to Your Salesforce Account

1. Go to [salesforce.com](https://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–

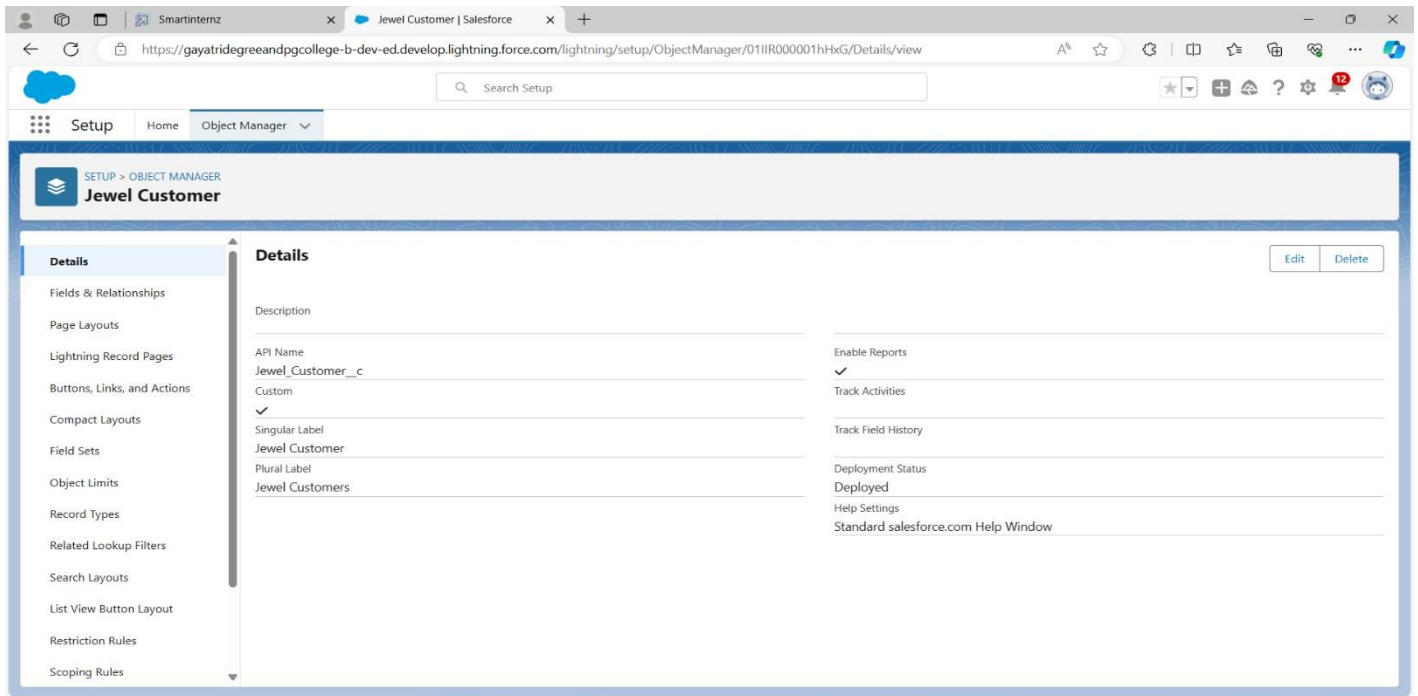
### Jewel Customer

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

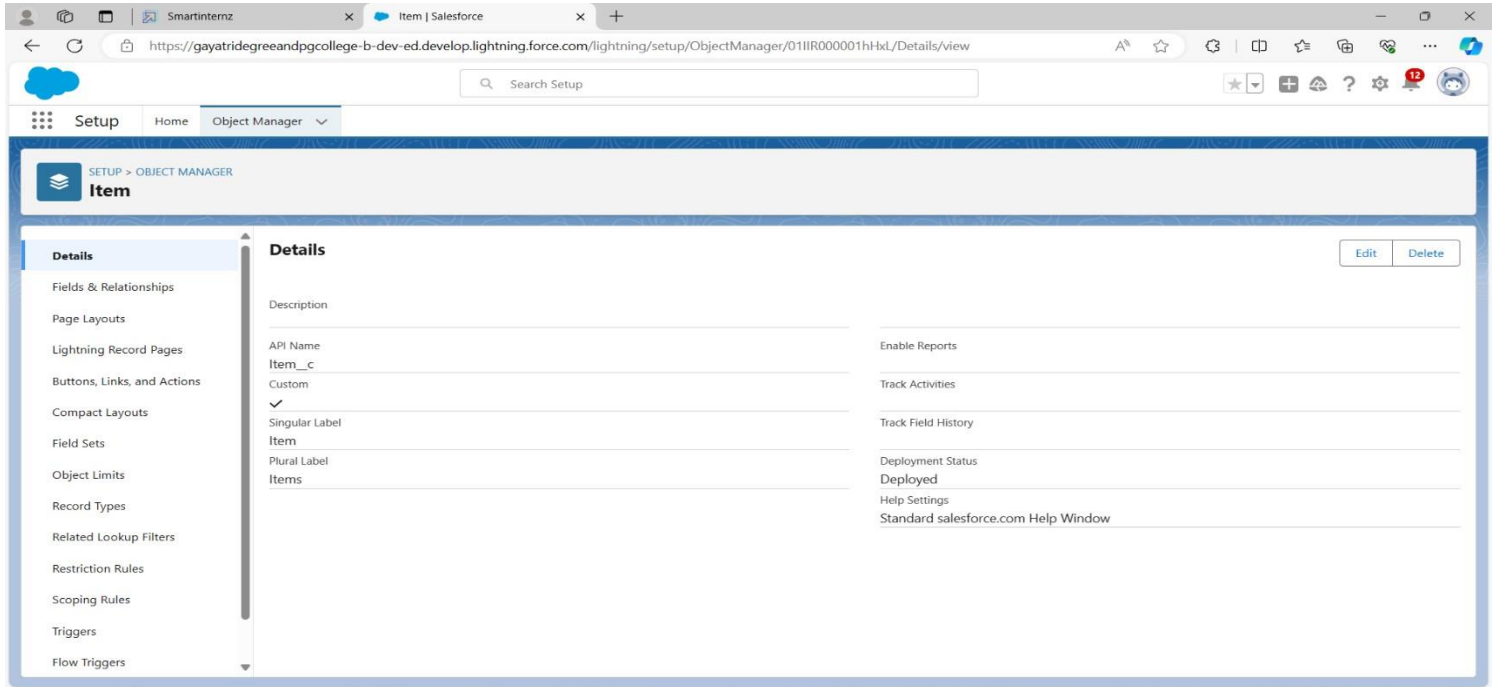
10. Click Save.



## Object- Item

Click on the gear icon and then select Setup.

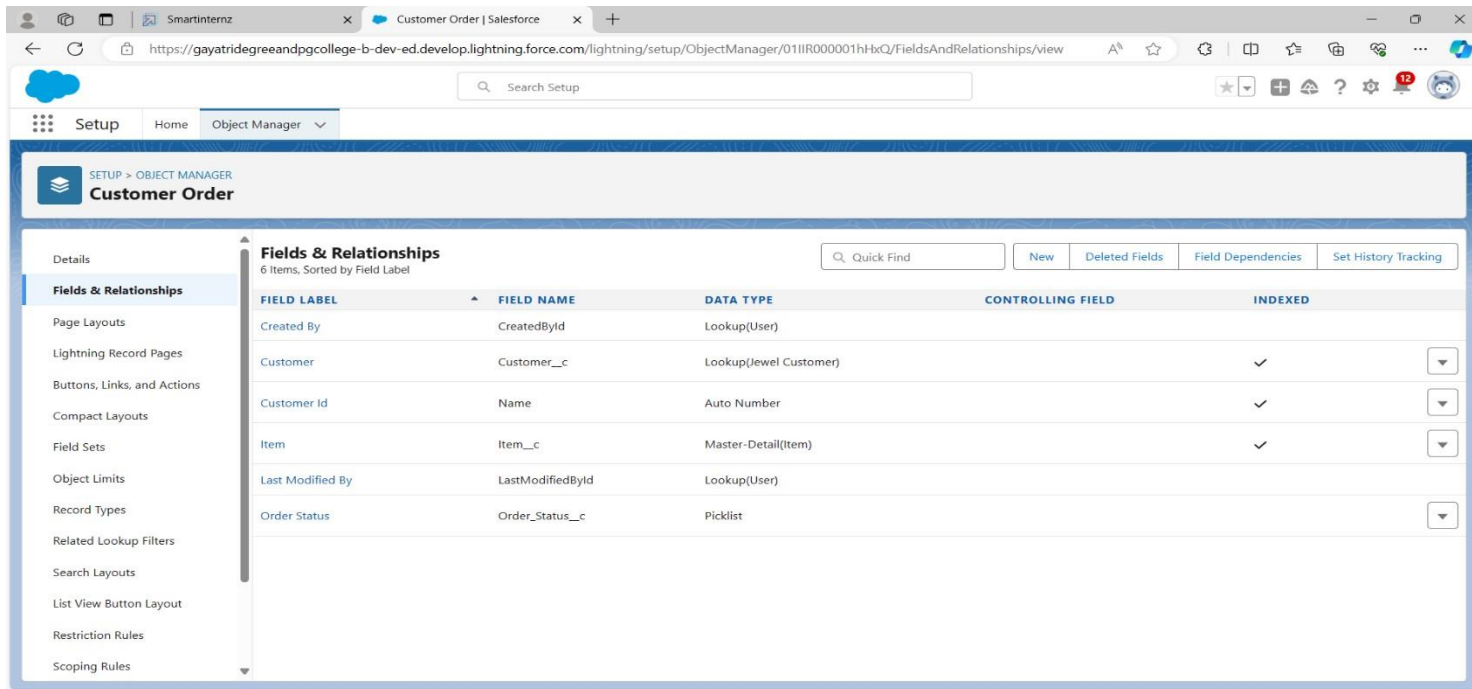
1. Click on the object manager tab just beside the home tab.
2. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
3. On the Custom Object Definition page, create the object as follows:
4. Label: **Item**
5. Plural Label: **Items**
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.

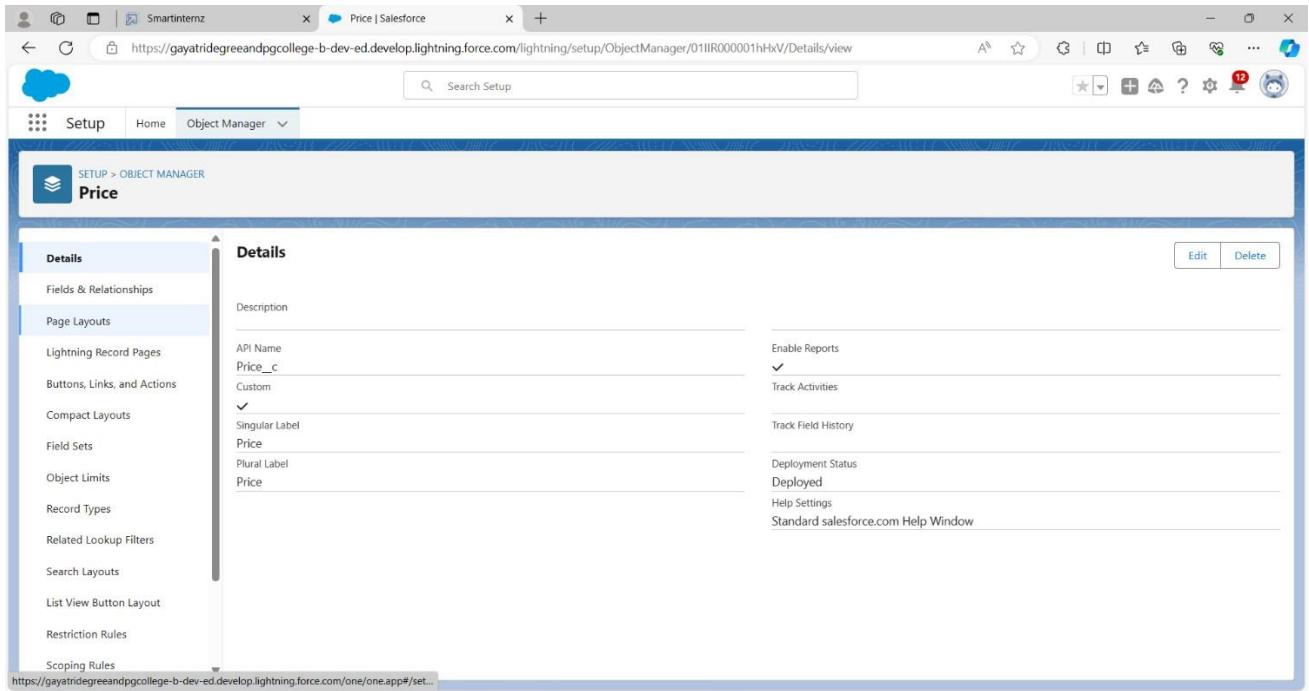


## Object- Price

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.



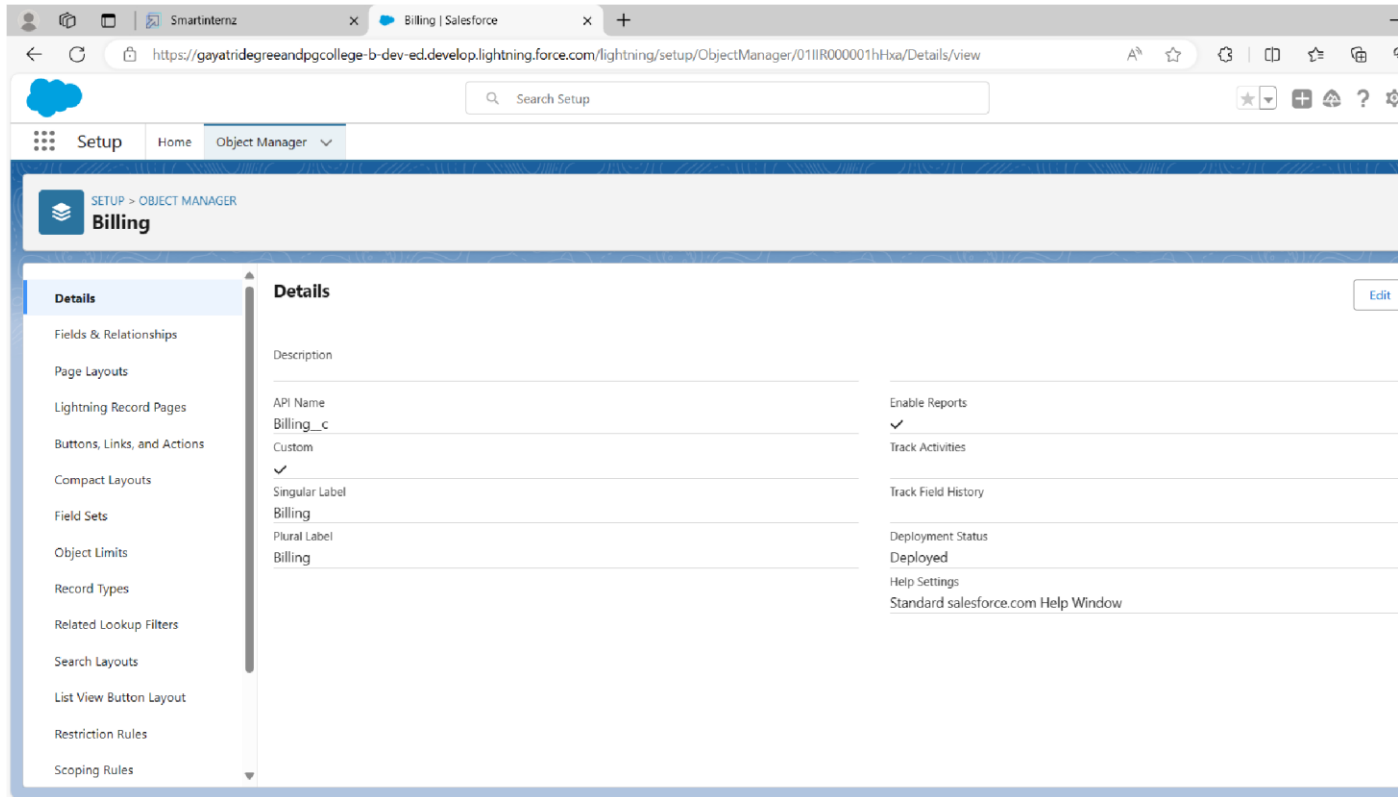
12. <https://gayatridegreeandpgcollege-b-dev-ed.develop.lightning.force.com/one/one.app#/set...>

## 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.

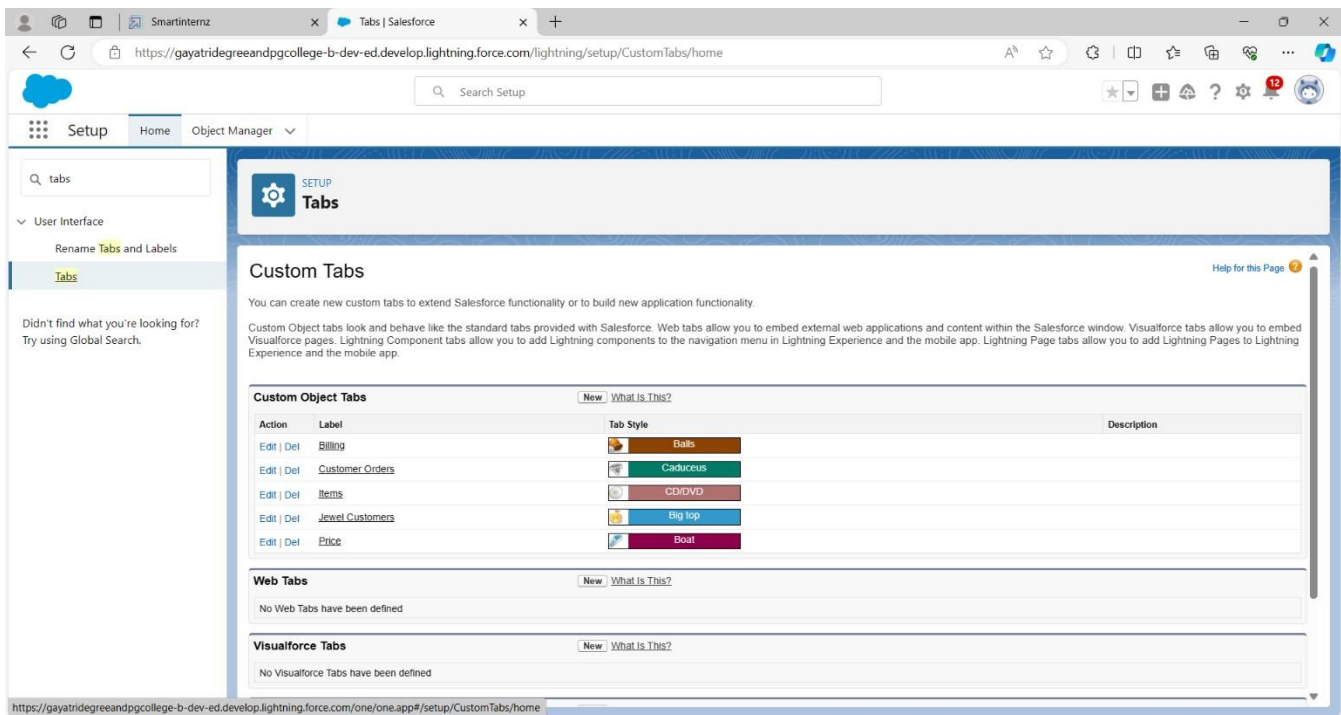


12.

## 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.

The screenshot shows the 'App Details & Branding' section of the Lightning App Builder. The left sidebar lists 'App Settings' with sub-items: 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', 'Navigation Rules', and 'User Profiles'. The main content area is titled 'App Details & Branding' and includes instructions: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' It contains two columns: 'App Details' and 'App Branding'. Under 'App Details', there are fields for 'App Name' (Jewelry Inventory System), 'Developer Name' (Jewelry\_Inventory\_System), and 'Description' (Elevate your look with elegance). Under 'App Branding', there is an 'Image' upload button, a 'Primary Color Hex Value' dropdown set to '#0070D2', and 'Org Theme Options' with a checkbox 'Use the app's image and color instead of the org's custom theme'. At the bottom, an 'App Launcher Preview' shows a blue icon with 'JI' and the app name and description.

The screenshot shows the 'Navigation Items' section of the Lightning App Builder. The left sidebar lists 'App Settings' with sub-items: 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items' (selected), 'Navigation Rules', and 'User Profiles'. The main content area is titled 'Navigation Items' and includes instructions: 'Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.' It contains two columns: 'Available Items' and 'Selected Items'. The 'Available Items' column has a search bar and a list of items: Accounts, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations, Approval Requests, Asset Action Sources, Asset Actions, and Asset State Periods. The 'Selected Items' column has a list of items: Jewel Customers, Items, Customer Orders, Price, Billing, Reports, and Dashboards. Arrows between the columns allow moving items back and forth.

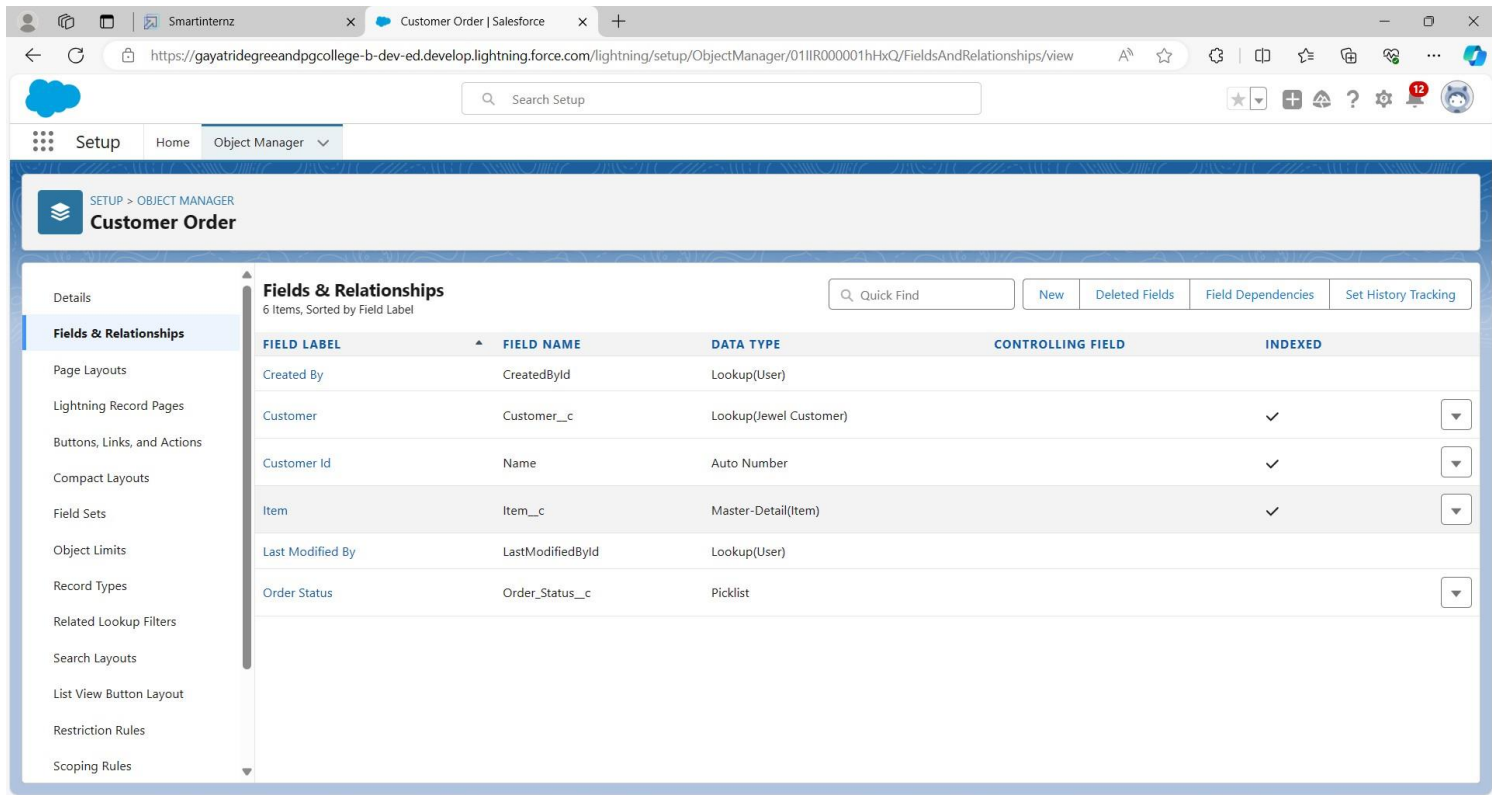
## **Milestone – 05: Fields**

**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. 

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		

## 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. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships (selected), 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 'Fields & Relationships' and shows a table of 13 items, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: City, Country, Created By, Customer Name, Email, Item Type, Last Modified By, Owner, Phone, and Purity. The 'Email' field is highlighted in blue. The 'Phone' field is also highlighted in blue. The 'Purity' field is highlighted in blue.

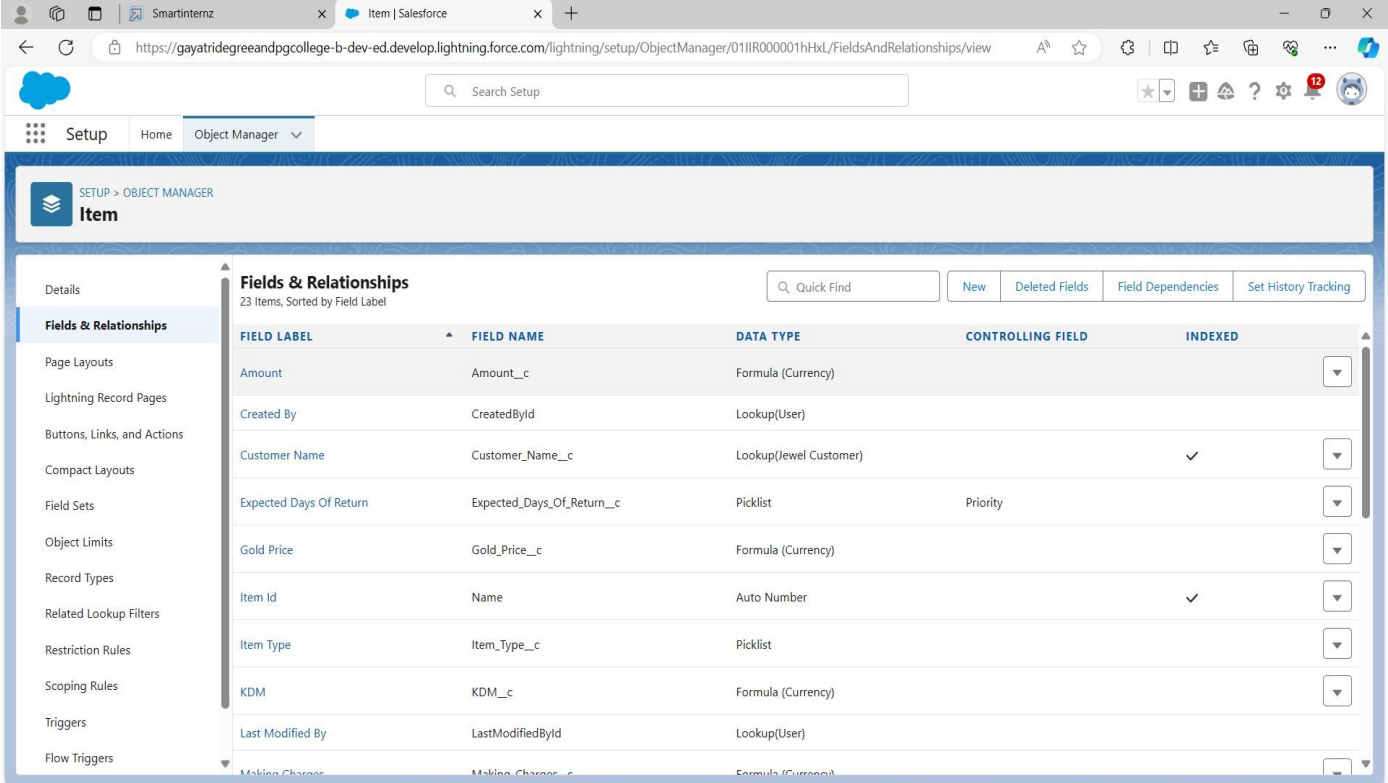
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Country	Country__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Email	Email__c	Email		
Item Type	Item_Type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	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

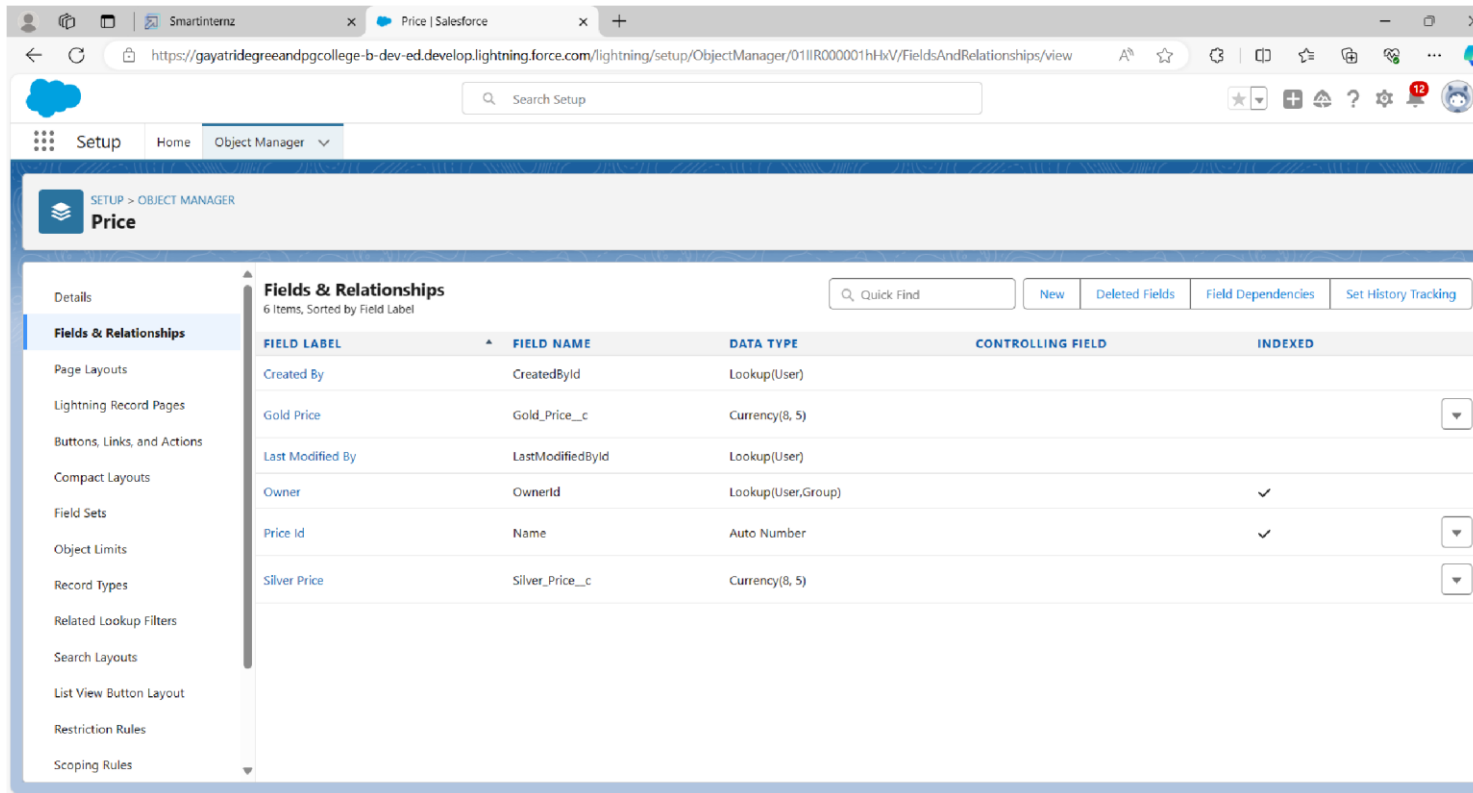
10. 

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)		

## 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
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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

	<div>1-3 Days</div> <div>4-5 Days</div> <div>6-7 Days</div> <div>8-10 Days</div>
Priority	<div>Picklist</div> <div>Low</div> <div>Medium</div> <div>High</div> <div>Critical</div>
Silver Price	<div>Formula</div> <div>(Return Type:Number)</div> <div>(Decimal=3)</div> <div>(Prices__r.Silver_price__c / 1000)</div>
Purity Gold Price	<div>Formula</div> <div>(Return Type:Currency)</div> <div>(Decimal=2)</div> <div>((Prices__r.Gold_price__c * Purity__c ) / 24) / 10</div>
Total Weight	<div>Formula</div> <div>(Return Type:Number)</div> <div>(Decimal=3)</div> <div>(Weight__c - Stone_weight__c)</div>
Amount	<div>Formula</div> <div>(Return Type:Currency)</div> <div>(Decimal=3)</div> <div>IF(ISPICKVAL( Item_Type__c ,"Gold"), Total_weight__c * Purity_Gold_price__c , Total_weight__c * Silver_price__c )</div>
KDM	<div>Formula</div> <div>(Return Type:Currency)</div> <div>(Decimal=0)</div>

			<div> <div>(Amount__c * Percentage__c )</div> <div>/ 100</div> </div>
		Making Charges	<div> <div>Formula</div> <div>(Return Type:Currency)</div> <div>(Decimal=0)</div> <div> <div>IF(ISPICKVAL(</div> <div>Item_Type__c</div> <div>,"Gold"), Weight__c * 300</div> <div>, Weight__c * 10 )</div> </div> </div>

4	Customer Order	<div> <div>Order Status</div> <div> <div>Picklist</div> <div> <div>Started</div> <div>Not Started</div> <div>On Hold</div> <div>Completed</div> <div>Not Completed</div> </div> </div> </div>
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5	Billing		
		Field Label:Item	Lookup Relationship with Item Object
		Orna ment	Formula (Return Type:Text)  <div>Item__r.Ornament__c</div>
		Stone weight	Formula (Return Type:Number) (Decimal=2)  <div>Item__r.Stone_weight__c</div>
		Wei ght	Formula Return Type:Number (Decimal=2)  <div>Item__r.Total_weight__c</div>

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

#### 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 ) ,

SETUP > OBJECT MANAGER  
Jewel Customer

Validation Rules  
2 Items, Sorted by Rule Name

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

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.
- 

## Milestone – 06: Profiles

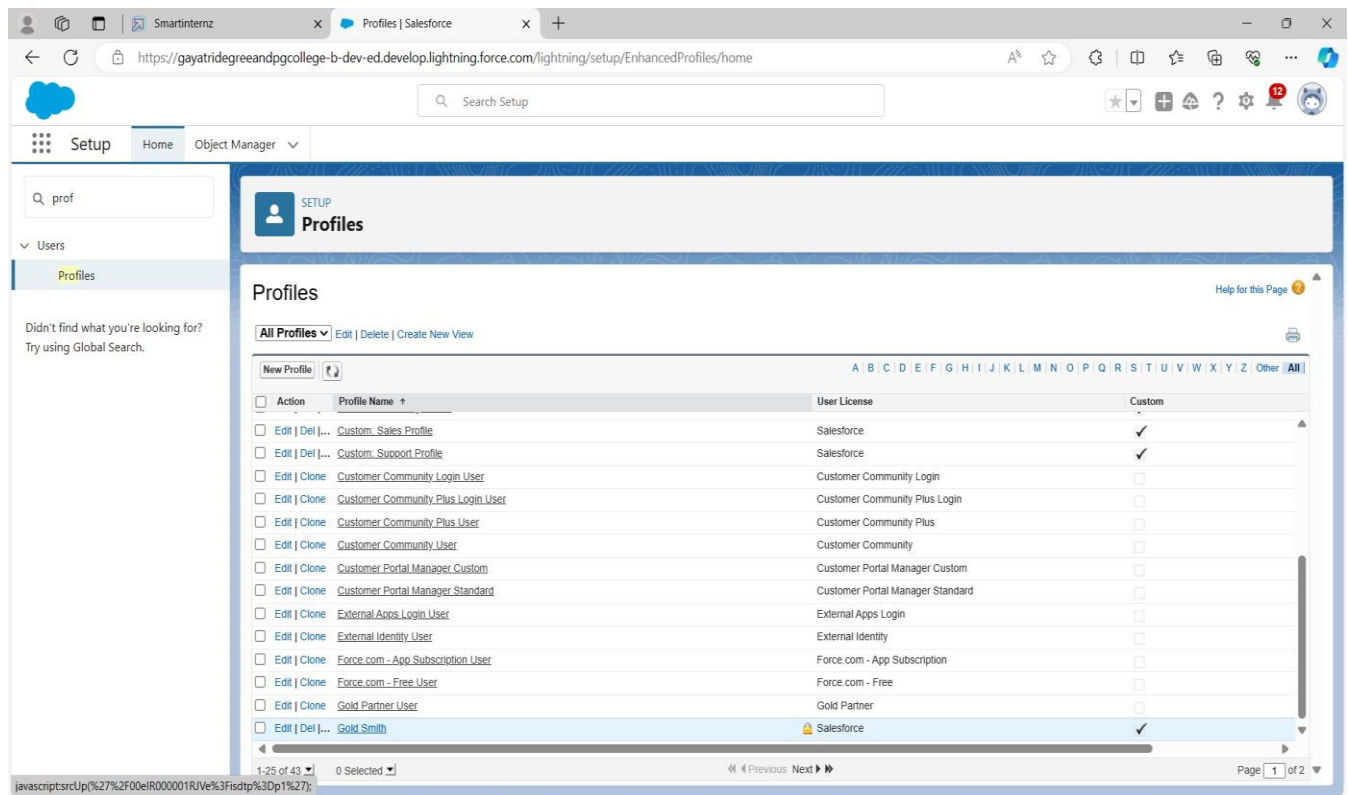
Gold Smith



The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with the following items: 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, and Flow Triggers. The main content area is titled 'Validation Rules' and shows '1 Items, Sorted by Rule Name'. Below this is a table with the following columns: RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, and MODIFIED BY. The table contains one row with the following data: RULE NAME: ValidationRule\_For\_Item, ERROR LOCATION: Top of Page, ERROR MESSAGE: Please fill Required fields, ACTIVE: ✓, MODIFIED BY: G NAVEEN KUMAR, 12/04/2024, 8:43 pm.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
ValidationRule_For_Item	Top of Page	Please fill Required fields	✓	G NAVEEN KUMAR, 12/04/2024, 8:43 pm

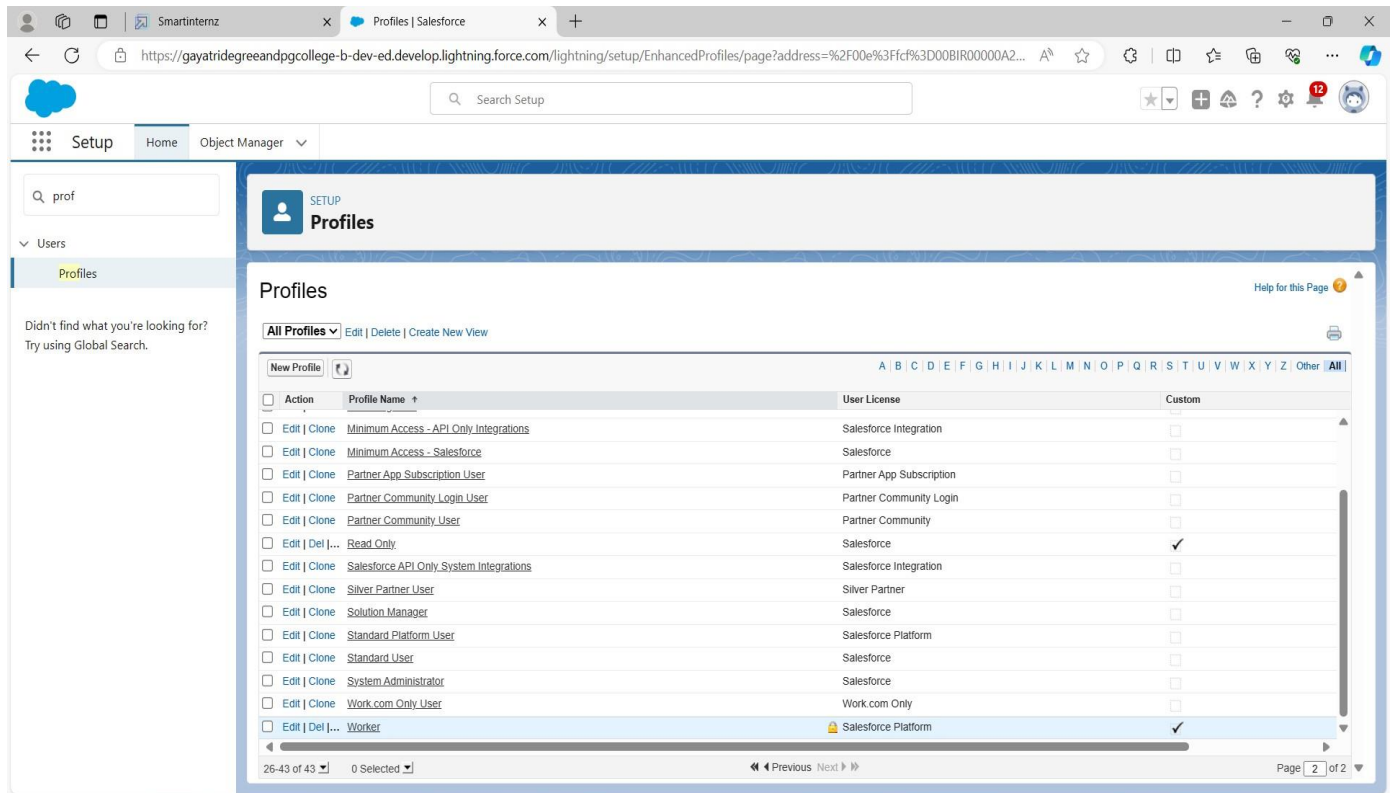
1. Go to setup - type profiles in quick find box - click on profiles - clone the desired profile (system administrator) - enter profile name (Gold Smith) - Save.
2. Scroll down to Custom Object Permissions and Give access permissions for Jewel Customer, Item, Customer Order, Prices, Billings objects.
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.

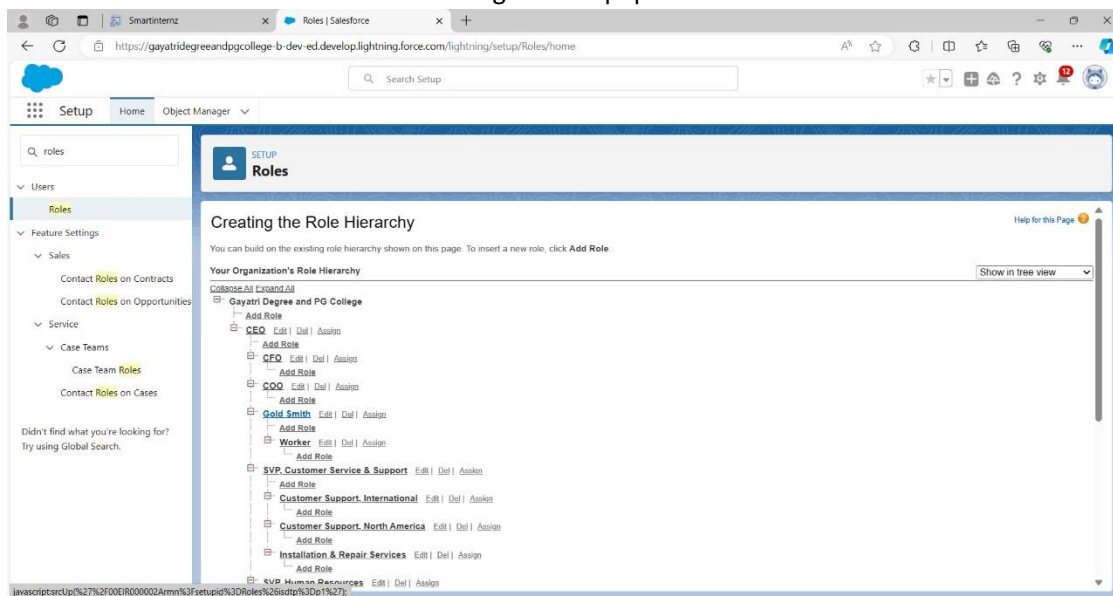


5.

## 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.



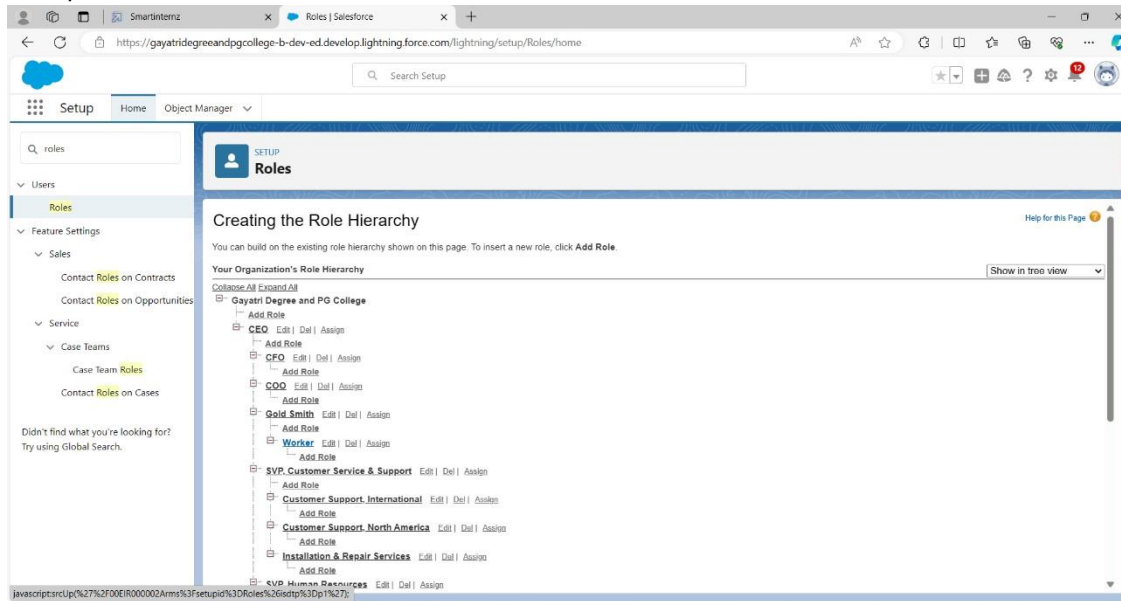
4.

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. 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 page for Users. The left sidebar contains the navigation menu with 'Users' selected. The main content area displays a table of all users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including Chatter Expert, Mikaelson Kim, Mikaelson Kol, Mikaelson Neel, Mikaelson Niklaus, Ummadi Hemanth Kumar, User Integration, and User Security. The 'Mikaelson Neel' user is highlighted in blue.

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00ddm0000004g3tuuaa.hezp4nuodock@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	Mikaelson Kim	kmika	ummadihemanthkumar1@gmail.com	Worker	✓	Worker Profile
<a href="#">Edit</a>	Mikaelson Kol	kmika	ummadihemanthkumar192@gmail.com	Worker	✓	Worker Profile
<a href="#">Edit</a>	Mikaelson Neel	kmika	ummadihemanthkumar19@gmail.com	Worker	✓	Worker Profile
<a href="#">Edit</a>	Mikaelson Niklaus	nmika	ummadihemanthkumar12@gmail.com	Gold Smith	✓	Gold Smith
<a href="#">Edit</a>	Ummadi Hemanth Kumar	HUmma	uhemanthkumar@longtermproject.com		✓	System Administrator
<a href="#">Edit</a>	User Integration	integ	integration@00ddm0000004g3tuuaa.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	sec	insightssecurity@00ddm0000004g3tuuaa.com		✓	Analytics Cloud Security User

## Milestone – 9: Page Layout

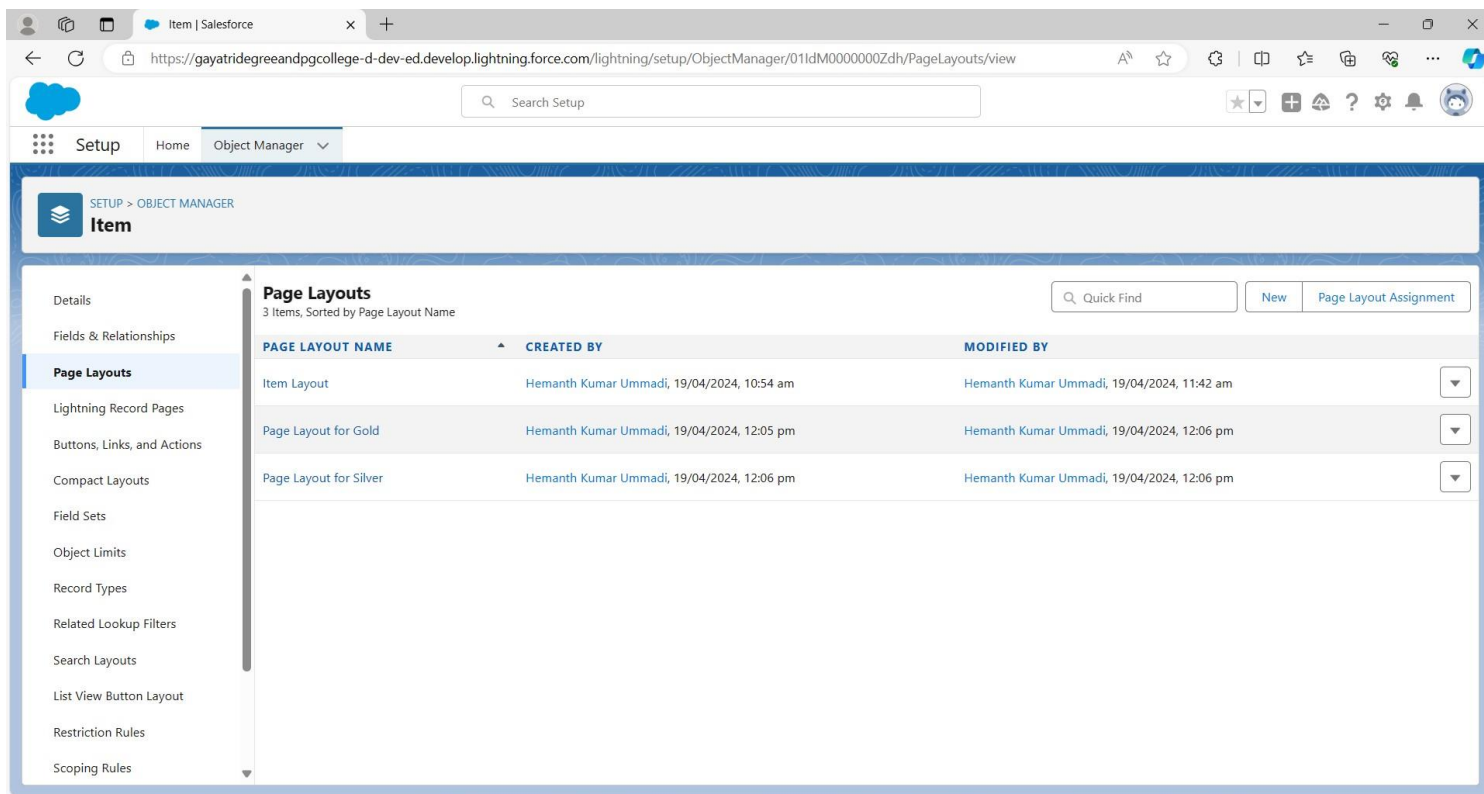
### To create a page layout for Gold

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 Setup interface. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts (selected), 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 'Page Layouts' and shows a table with 3 items, sorted by Page Layout Name. The table has columns for Page Layout Name, Created By, and Modified By. The items listed are: Item Layout, Page Layout for Gold, and Page Layout for Silver. Each item has a dropdown arrow to its right.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Item Layout	Hemanth Kumar Ummadi, 19/04/2024, 10:54 am	Hemanth Kumar Ummadi, 19/04/2024, 11:42 am
Page Layout for Gold	Hemanth Kumar Ummadi, 19/04/2024, 12:05 pm	Hemanth Kumar Ummadi, 19/04/2024, 12:06 pm
Page Layout for Silver	Hemanth Kumar Ummadi, 19/04/2024, 12:06 pm	Hemanth Kumar Ummadi, 19/04/2024, 12:06 pm

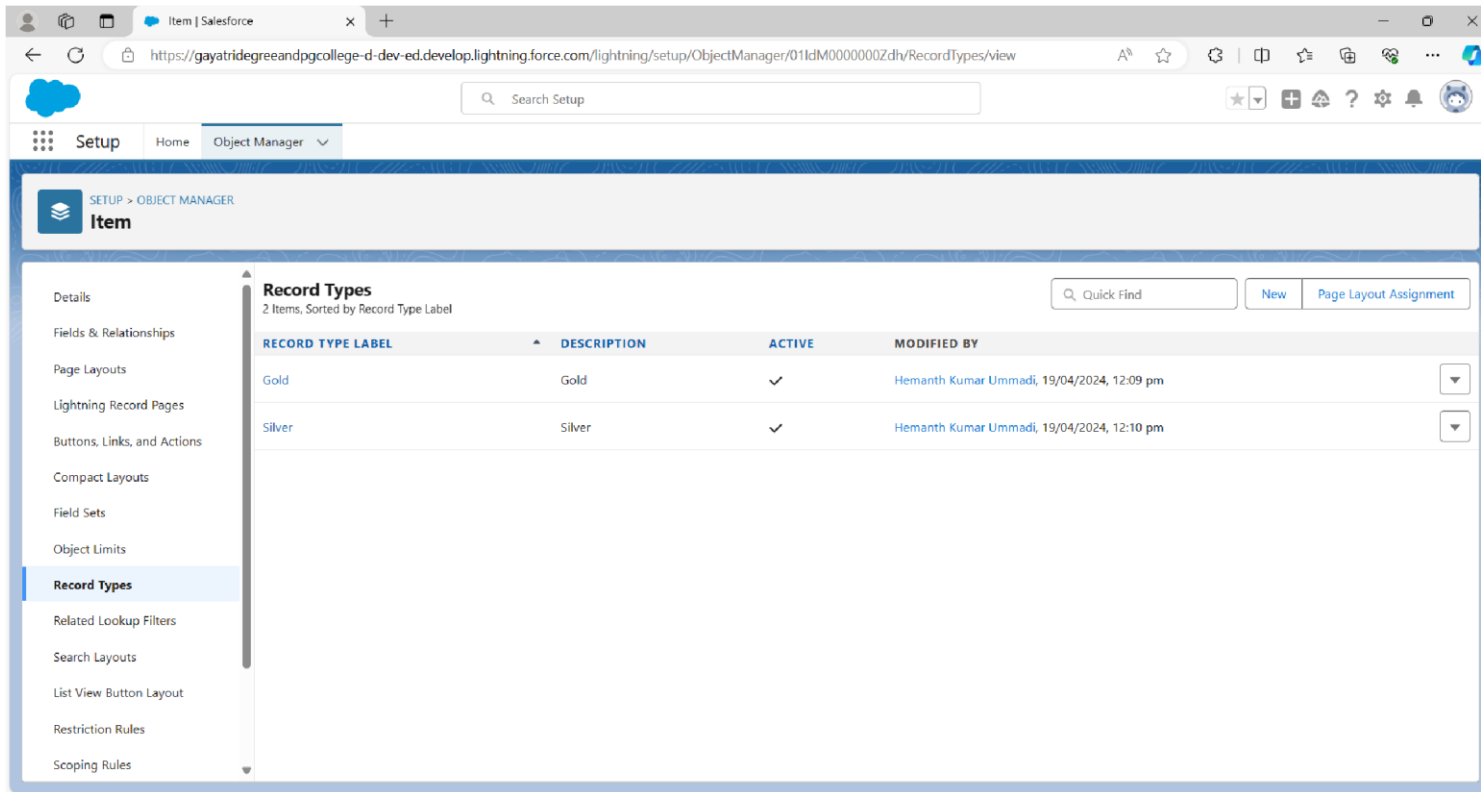
## Milestone-10: Record Types

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

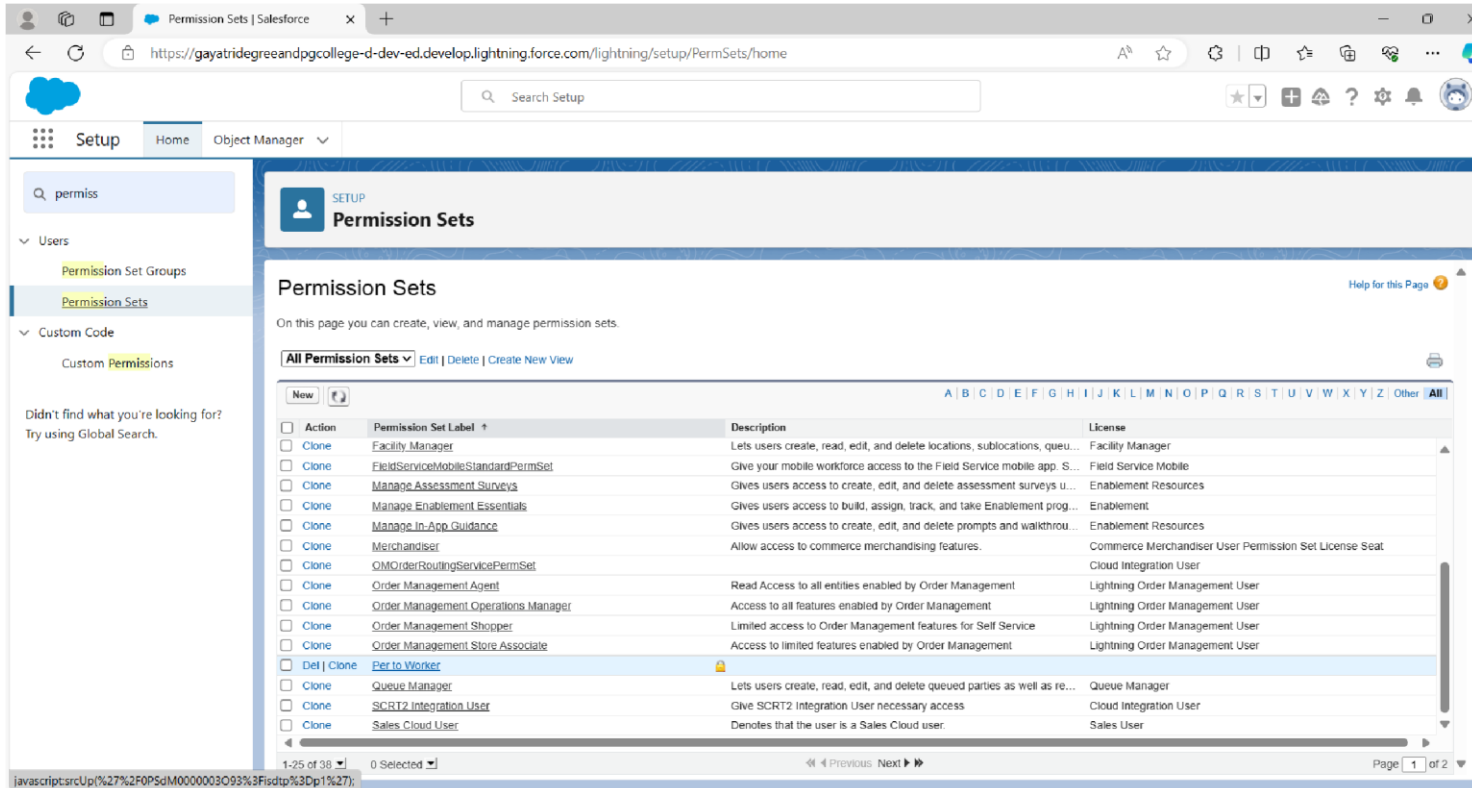


3. Click on new
4. Existing Record: Master
5. Label: Gold
6. Description: Gold items information
7. Uncheck for “Make Available”
8. Scroll down and check for the Gold Smith, Worker & System Administrator profile and click on Next.
9. Select “Apply a different layout for each profile”, and change page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

## 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

The screenshot shows the Salesforce Reports page. The browser tabs include 'Smartinternz' and 'Reports | Salesforce'. The address bar shows a URL from 'gayatridegreeandpgcollege-d-dev-ed.develop.lightning.force.com'. The page header includes a search bar and navigation icons. The main content area is titled 'Reports' and 'Recent' with '2 items'. A table lists the reports:

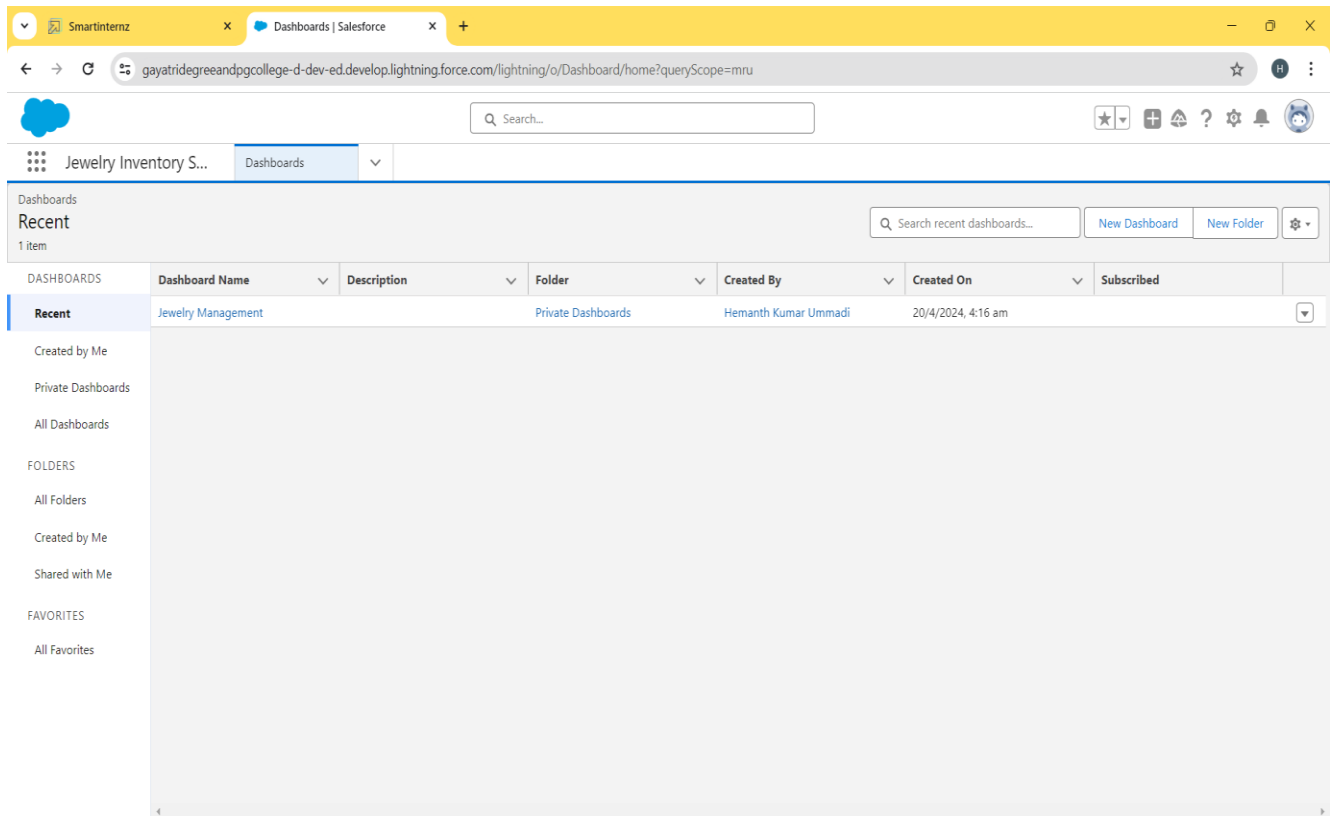
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Items with Billing Report		Private Reports	Hemanth Kumar Ummadi	19/4/2024, 8:51 pm	
Created by Me	New Billings with Item Report		Private Reports	Hemanth Kumar Ummadi	19/4/2024, 8:14 pm	

On the left sidebar, there are sections for 'REPORTS' (Recent, Created by Me, Private Reports, Public Reports, All Reports), 'FOLDERS' (All Folders, Created by Me, Shared with Me), and 'FAVORITES' (All Favorites).

## 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



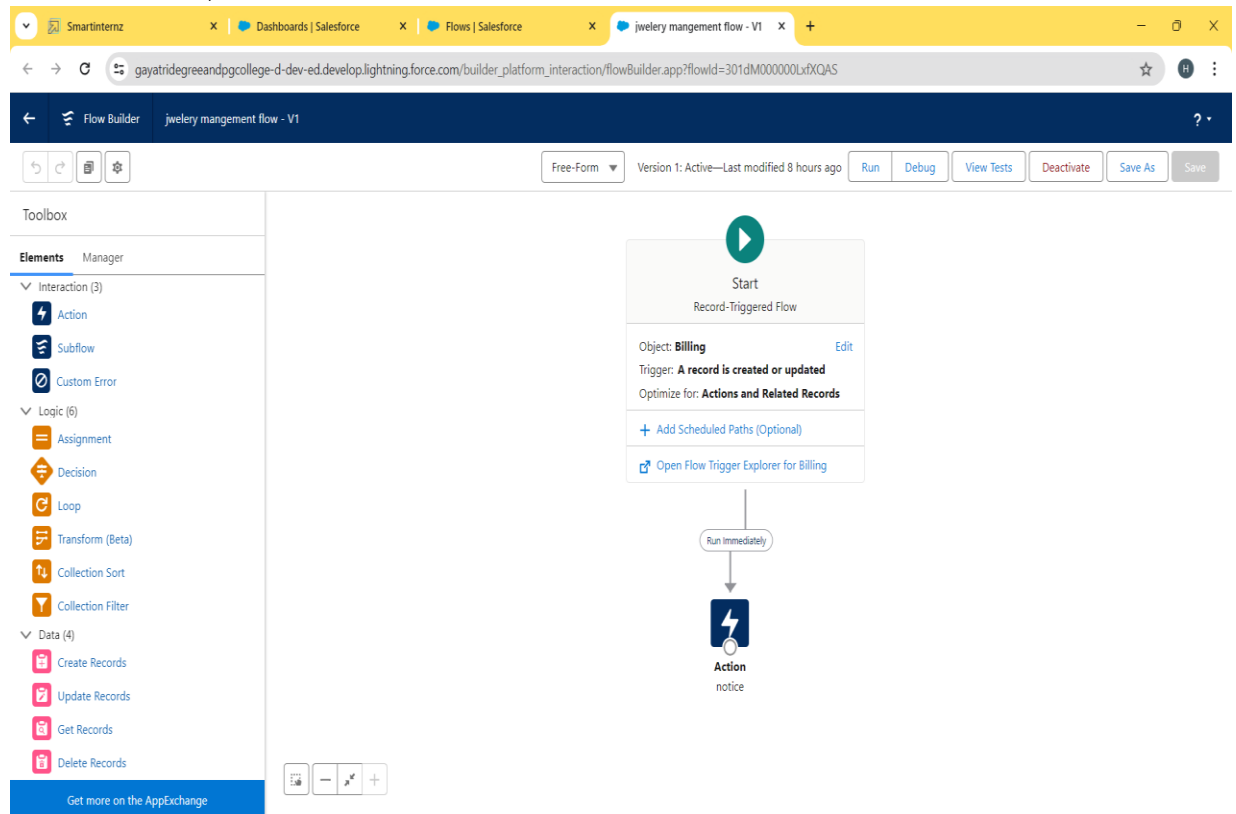
7.

## 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**