

Jewelry Management CRM Application

using Salesforce

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College Code:638101

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Jewelry Management CRM:

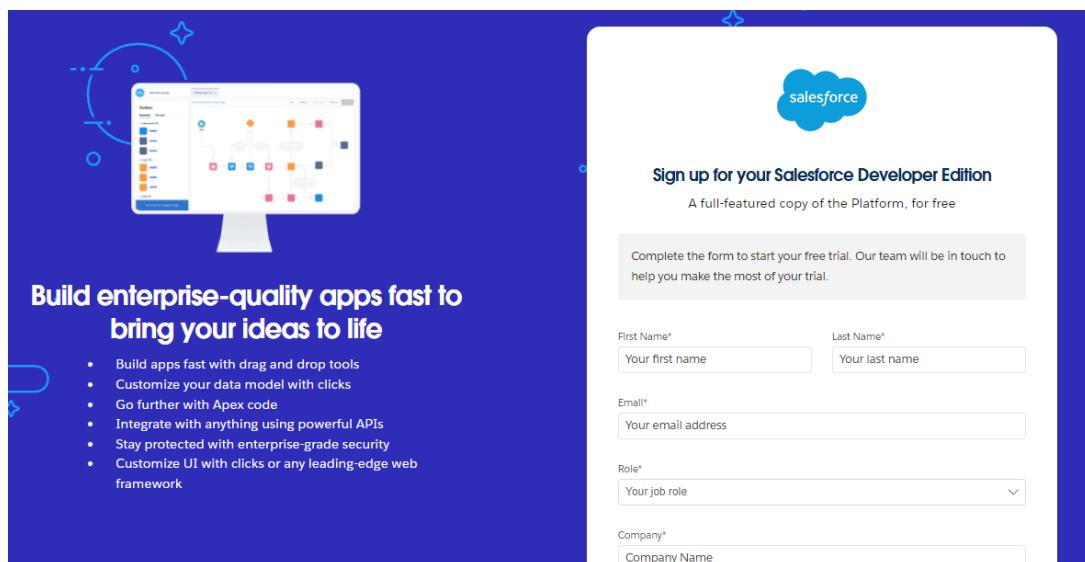
Utilizing Salesforce, our project streamlines jewelry inventory, sales, and customer management, ensuring efficiency, transparency, and better customer relationships.

Milestone 1: Salesforce developer account creation

Creating Developer Account:

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>



2. On the sign up form, enter the following details:

1. First name & Last name
2. Email
3. Role : Developer
4. Company : College or Comp
5. County : India

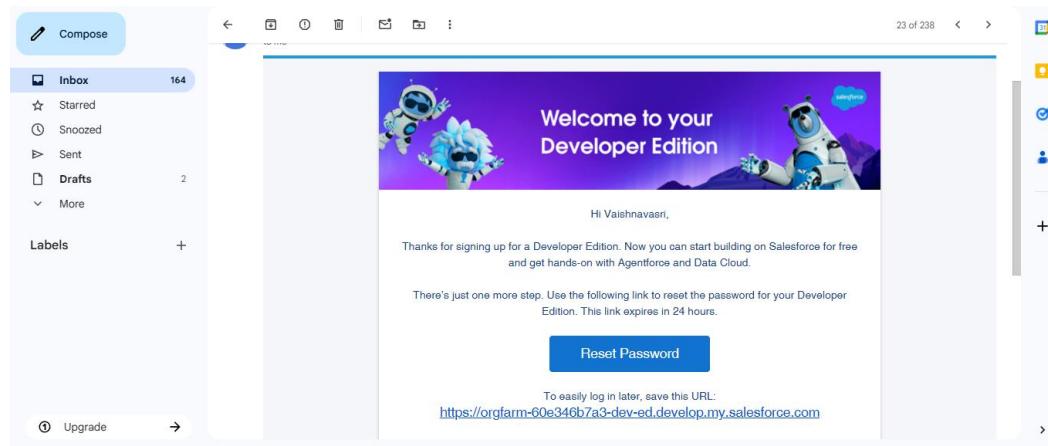
6. Postal Code : pin code

7. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format :
username@organization.com.

Account Activation:

1. 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.

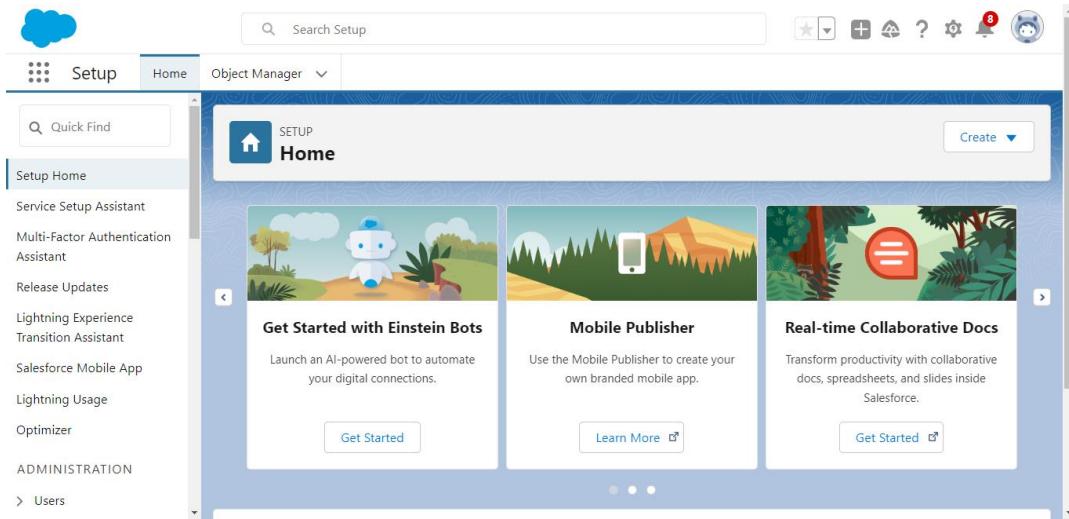


The screenshot shows the 'Change Your Password' page. It prompts the user to enter a new password for 'lead@sb.oom' and lists requirements: 8 characters, 1 letter, and 1 number. The 'New Password' field contains '.....' and is marked as 'Good'. The 'Confirm New Password' field also contains '.....' and is marked as 'Match'. Below these fields is a 'Security Question' section with the question 'In what city were you born?' and an 'Answer' field containing 'asdfghjkl'. A large red box highlights the 'New Password' and 'Confirm New Password' fields. At the bottom is a blue 'Change Password' button.

1. Click on Verify Account

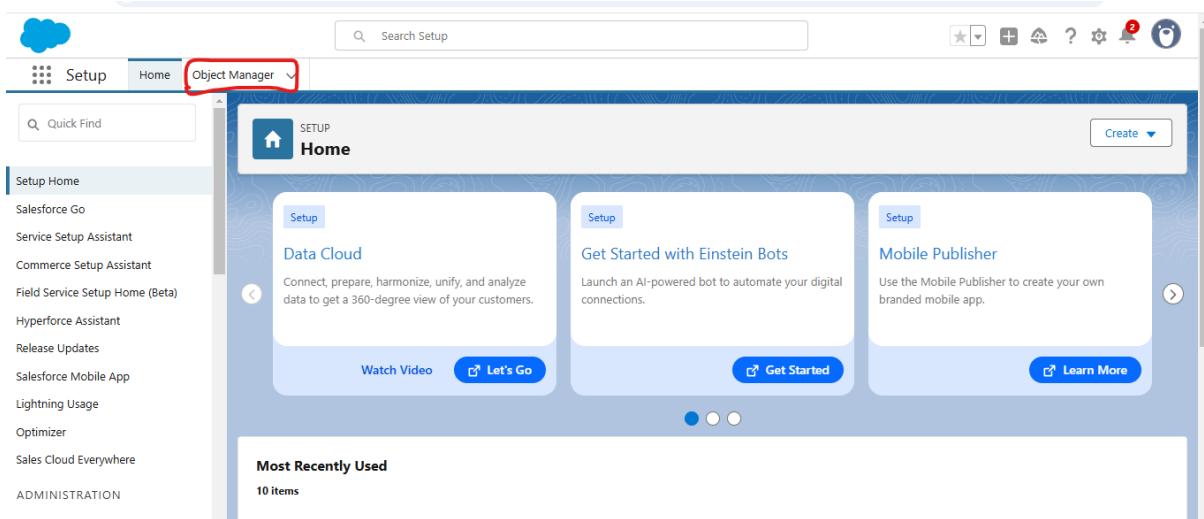
2. Give a password and answer a security question and click on change password.

3.Then you will redirect to your salesforce setup page.



Milestone 2 : OBJECT :

To Navigate to Setup page:



To create an object:

- 1.From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

Object Manager

53+ Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Account	Account	Standard Object		Custom Object from Spreadsheet

Enter the label name : Jewel Customer

1. Plural label name : Jewel Customers

New Custom Object

Custom Object Information

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

Label: JEWEL CUSTOMER

Object Name: Customer

Description:

Standard description page setting: Open the standard Description page Help & Training section

Contact Name: []

2. Enter Record Name Label and Format

- Record Name >> Customer name
- Data Type >> Text

The screenshot shows the 'Enter Record Name Label and Format' section where 'Record Name' is set to 'Customer' and 'Data Type' is 'Text'. Below this, under 'Optional Features', 'Allow Reports' is checked. In the 'Object Classification' section, 'Allow Sharing' and 'Allow Bulk API Access' are checked. Under 'Deployment Status', 'Deployed' is selected.

3.Allow search and click Save.

Activity 1:Create Item Object

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
1. Enter the label name >> Item
2. Plural label name >> Items
3. Enter Record Name Label and Format
 - Record Name >> Item Id
 - Data Type >> Auto Number
 - Display Format >> Item-{00}
 - Starting Number >> 1
2. Click on Allow reports.
3. Allow search >> Save.

Activity 2: Create customer Order Object

To create an object:

4. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
5. Enter the label name >> Customer Order
6. Plural label name >> Customer Orders
7. Enter Record Name Label and Format
8. Record Name >> Customer Orde
9. Data Type >> Auto Number
10. Display Format >> Customer Orde-{00}
11. Starting Number >> 1
12. Click on Allow reports.
13. Allow search >> Save

Activity 3: Create Price Object

To create an object:

2. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
4. Enter the label name >> price
5. Plural label name >> prices
6. Enter Record Name Label and Format
 - Record Name >> price
 - Data Type >> Auto Number
 - Display Format >> price-{00}
 - Starting Number >> 1
14. Click on Allow reports.
Allow search >> Save

Activity 4: Create Billing Object

To create an object:

3. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
7. Enter the label name >> Billing
8. Plural label name >> Billings
9. Enter Record Name Label and Format
 - Record Name >> Billing
 - Data Type >> Auto Number
 - Display Format >> Billing-{00}
 - Starting Number >> 1
15. Click on Allow reports.
Allow search >> Save.

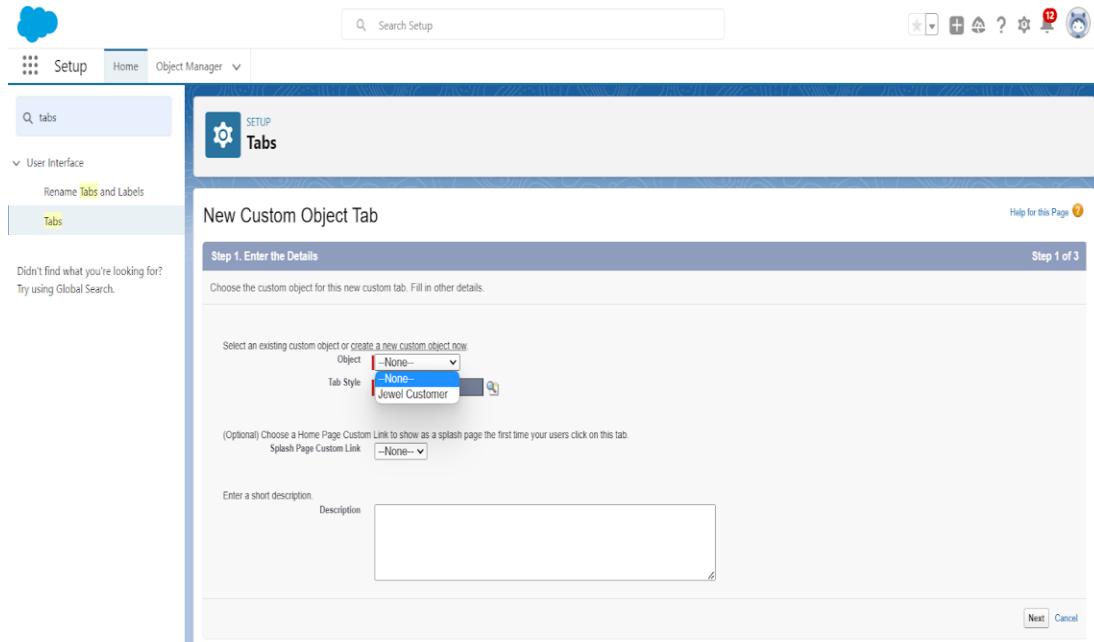
Milestone 3 : TABS :-

What is Tab: A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Activity 1: Creating a Custom Tab:-

To create a Tab:(Customer)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)



2. Select Object(Jewel Customer) >> Select any tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) keep it as default >> Save.

Activity 2: To create a Tab:(Item)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Item) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) keep it as default >> Save.

Milestone 4: THE LIGHTNING APP:-

Create a Lightning App:

To create a lightning app page:

1. Go to setup page >> search “app manager” in quick find >> select “app manager” >>
2. click on New lightning App.

The screenshot shows the Salesforce App Manager interface. The left sidebar has a search bar with 'app man' typed in, and the 'App Manager' link under the 'Apps' section is highlighted with a red box. The main content area is titled 'Lightning Experience App Manager' and displays a table of 27 items. At the top right of the table, there is a blue button labeled 'New Lightning App' with a red box around it. The table columns include App Name, Developer Name, Description, Last Modified, App Type, and various edit and delete icons.

App Name ↑	Developer Name	Description	Last Modified	Ap... ▾	Vi... ▾
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	8/21/2025, 1:12 A...	Classic	⋮
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	8/21/2025, 1:12 A...	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	8/21/2025, 1:12 A...	Classic	✓
4 Approvals	Approvals	Manage approvals and approval flows	8/21/2025, 1:12 A...	Lightning	✓
5 Automation	FlowsApp	Automate business processes and repetitive tasks.	8/21/2025, 1:18 A...	Lightning	✓
6 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for you...	8/21/2025, 1:12 A...	Lightning	✓
7 Community	Community	Salesforce CRM Communities	8/21/2025, 1:12 A...	Classic	✓
8 Content	Content	Salesforce CRM Content	8/21/2025, 1:12 A...	Classic	✓
9 Data Cloud	Audience360	Build a thorough and complete understanding of your cus...	8/21/2025, 1:12 A...	Lightning	✓
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and man...	8/21/2025, 1:12 A...	Lightning	✓
11 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	8/21/2025, 1:12 A...	Lightning	✓

3.Fill the app name in app details and branding as follow

App Name : Jewellery Inventory System

Developer Name : This will auto populated

Description : Elevate your look with elegance

Image : optional (if you want to give any image you can otherwise not mandatory)

Primary colour hex value : keep this default.

App Details & Branding

App Details

* App Name

* Developer Name

Description

App Branding

Image Primary Color Hex Value

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

App Launcher Preview

4. Then click Next >> (App option page) Set Navigation Style as Console Navigation >> Next.

App Options

Navigation and Form Factor

* Navigation Style Standard navigation Console navigation

* Supported Form Factors Desktop and phone Desktop Phone

Setup and Personalization

Setup Experience Setup (full set of Setup options) Service Setup

App Personalization Settings

Disable end user personalization of nav items in this app Clear workspace tabs for each new console session

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename 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.

Available Items

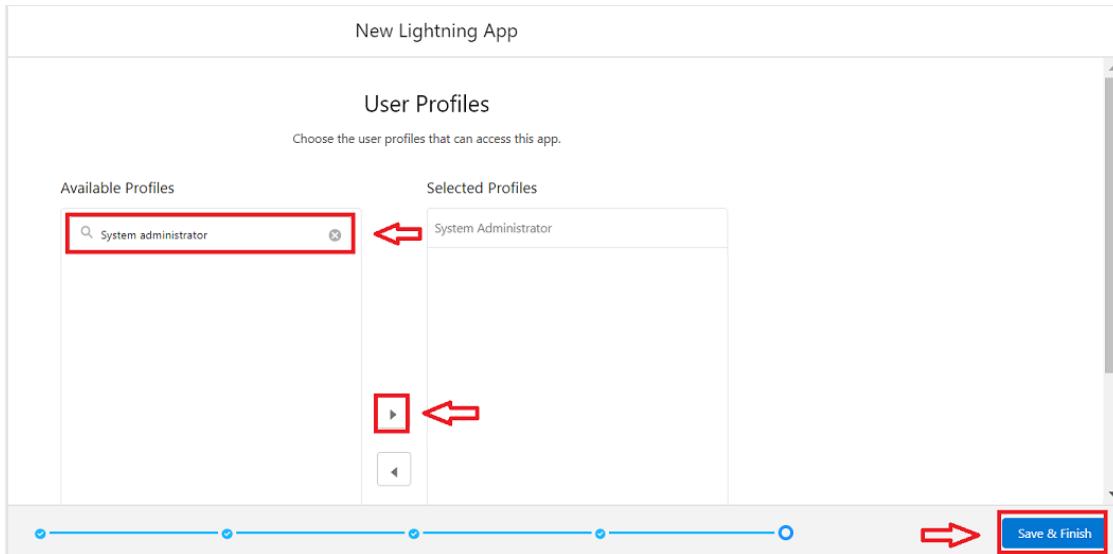
Type to filter list:

- Accounts
- Alert Settings
- All Sites
- Alternative Payment Methods
- App Launcher
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions
- Asset Services

Selected Items

- Jewel Customers
- Items
- Customer Orders
- Prices
- Billings
- Reports
- Dashboards

- Search for the item in the (JewelCustomer, Item, CustomerOrder, Price, Billing, Reports, Dashboard) from the search bar and move it using the arrow button ? Next? Next.
- To Add User Profiles:



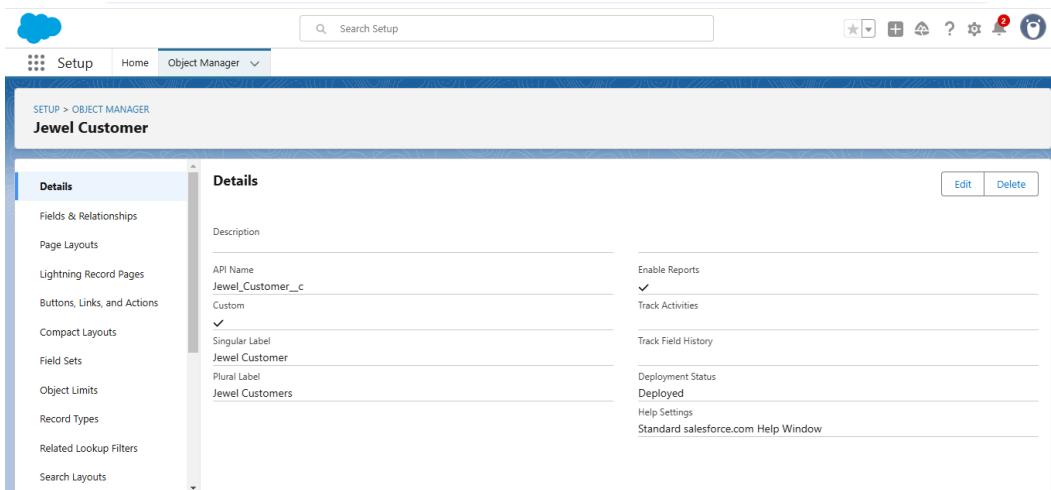
Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

Milestone 5: FIELDS :-

Creating Lookup Relationship

To Create a relationship between Jewel Customer & Customer Order Objects.

1. Go to the setup page >> click on object manager >> type object name(Customer Order) in the quick find bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select “Lookup relationship” as data type and click Next.
4. Select the related object “ Jewel Customer ”.
5. Give Field Label as “Customer” and click Next.
6. Next >> Next >> Save.



Creating a Master-Detail Relationship

To Create a Master-Detail relationship :

1. Go to the setup page >> click on object manager >> type object name(Customer Order) in the quick find bar >> click on the object.
2. Click on fields & relationships >> click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. Select the related object “ Item”.
5. Give Field Label as “Item” and click Next.
6. Next >> Next >> Save.

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with icons for Home, Object Manager, and other setup options. Below it, a search bar says "Search Setup". The main area is titled "SETUP > OBJECT MANAGER" and shows the "Item" object details. On the left, a sidebar lists various configuration options like Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main "Details" section shows fields such as Description, API Name (set to "Item__c"), Custom (checked), Singular Label (set to "Item"), Plural Label (set to "Items"), and several checkboxes for reports, activities, and history. At the bottom right of the main area are "Edit" and "Delete" buttons.

Creating Text Field in Jewel Customer Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.

1. Select Data type as “Text”.
2. Click on Next
3. Fill the above as following:
4. Field Label: City
5. Length : 20
6. Field Name : gets auto generated
7. Click on Next >> Next >> Save and new.

Field Label	City	Object Name	Jewel Customer
Field Name	City	Data Type	Text
API Name	City__c		

Creating the Phone field in object Jewel Customer

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Phone” and click Next.
4. Given the Field Label as “ Phone”.
5. Field Name will be auto populated, and click on Next >> Next >> Save & new.

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar with 'Search Setup' and various navigation icons. Below the header, the 'Object Manager' tab is selected. The main content area is titled 'SETUP > OBJECT MANAGER' and shows 'Jewel Customer'. On the left, a sidebar under 'Fields & Relationships' lists options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main panel shows a custom field named 'Phone' for the 'Jewel Customer' object. The field definition details include:

Field Label	Phone	Object Name	Jewel Customer
Field Name	Phone	Data Type	Phone
API Name	Phone__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Vaishnavasri.p, 8/27/2025, 2:17 AM	Modified By	Vaishnavasri.p, 8/27/2025, 2:17 AM

Creating the Email field in object Jewel Customer

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Email” and click Next.
4. Given the Field Label as “ Email”.
5. Field Name will be auto populated, and click on Next >> Next >> Save.

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

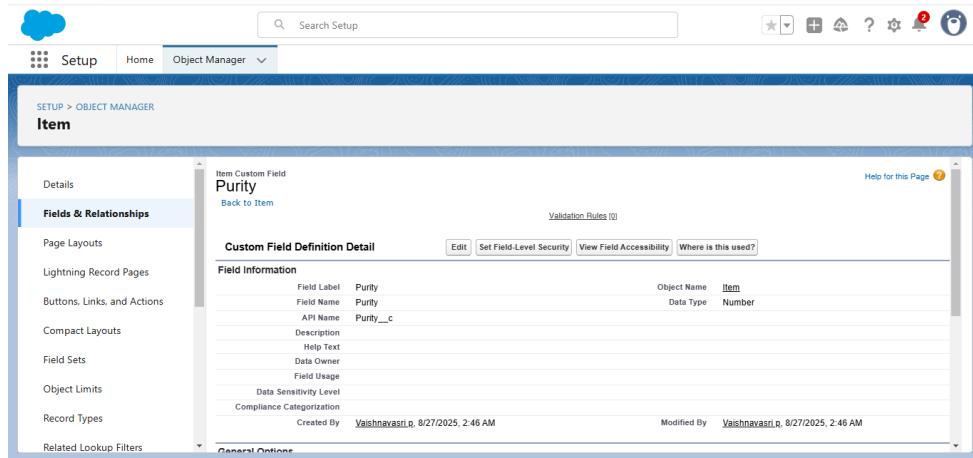
- Header:** Search Setup, Home, Object Manager
- Breadcrumb:** SETUP > OBJECT MANAGER
- Object Name:** Jewel Customer
- Section:** Fields & Relationships
- Field Definition Detail:**
 - Email** (Custom Field)
 - Back to Jewel Customer**
 - Validation Rules (0)**
 - Buttons:** Edit, Set Field-Level Security, View Field Accessibility, Where is this used?
- Field Information:**

Field Label	Email	Object Name	Jewel Customer
Field Name	Email	Data Type	Email
API Name	Email__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Vaishnavasri.p, 8/27/2025, 2:43 AM	Modified By	Vaishnavasri.p, 8/27/2025, 2:43 AM
- Related Navigation:** Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters.

Creating the number field in Item object

To create fields in an object:

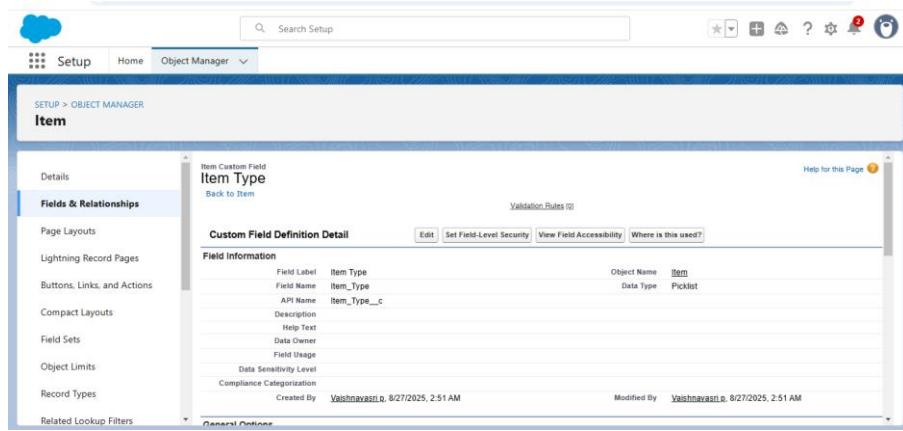
1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Number” and click Next.
4. Given the Field Label as “ Purity” and length as “ 2 ”.
5. Field Name will be auto populated,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



Creating Picklist Field in Item Object

To create fields in an object:

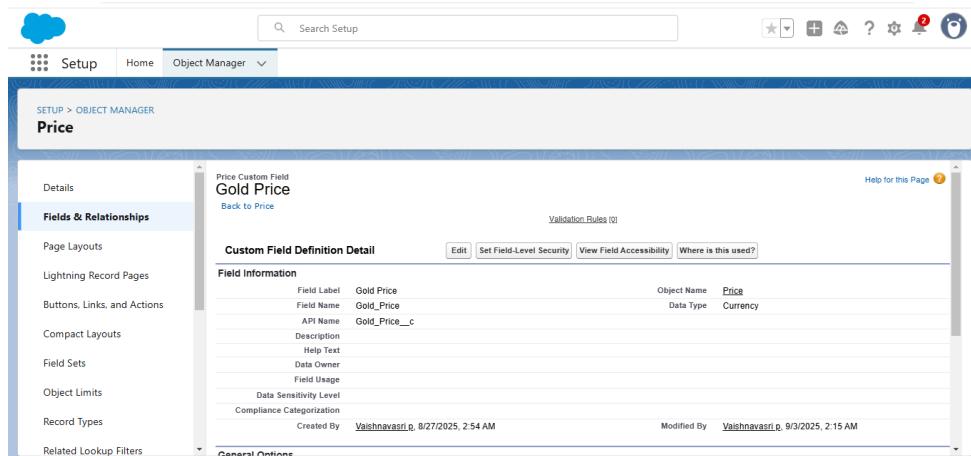
1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar>> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select Data type as “Picklist” and click Next.
4. Enter Field Label as “Item Type”.
5. In values select “Enter values(Gold,Silver), with each value separated by a new line” and enter values as shown below.
6. Click Next? Next ? Next ? Save .



Creating Currency Field in Price Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Price) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select Data type as “Currency” and click Next.
4. Enter Field Label as “Gold Price” and length as “ 8”and decimal 0.Field name will be auto generated.
5. Click Next >> Next >> Next >> Save .



Creating Formula Field(Cross Object) in Item Object

To create fields in an object:

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

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select Data type as “Formula” and click Next.
4. Give Field Label and Field Name as “Gold Price” and select formula return type as “Currency” and click next.
5. Under Advanced Formula write down the formula :Prices__r.Gold_price__c / 10.
6. click “Check Syntax” and Next >> Next >> Save & New.

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

Custom Field Definition Detail

Field Information

Field Label	Gold Price	Object Name	Item
Field Name	Gold_Price		
API Name	Gold_Price__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Formula Options

Data Type	Formula
Decimal Places	2
Prices__r.Gold_Price__c / 10	

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

Creating Remaining Fields in Objects

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

Custom Field Definition Detail

Field Information

Field Label	State	Object Name	Jewel Customer
Field Name	State	Data Type	Text
API Name	State__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

General Options

Required	<input type="checkbox"/>
----------	--------------------------

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A custom field named 'Street' is being edited for the 'Jewel Customer' object. The field has a label 'Street', a name 'Street', and an API name 'Street__c'. It is a text field with no validation rules.

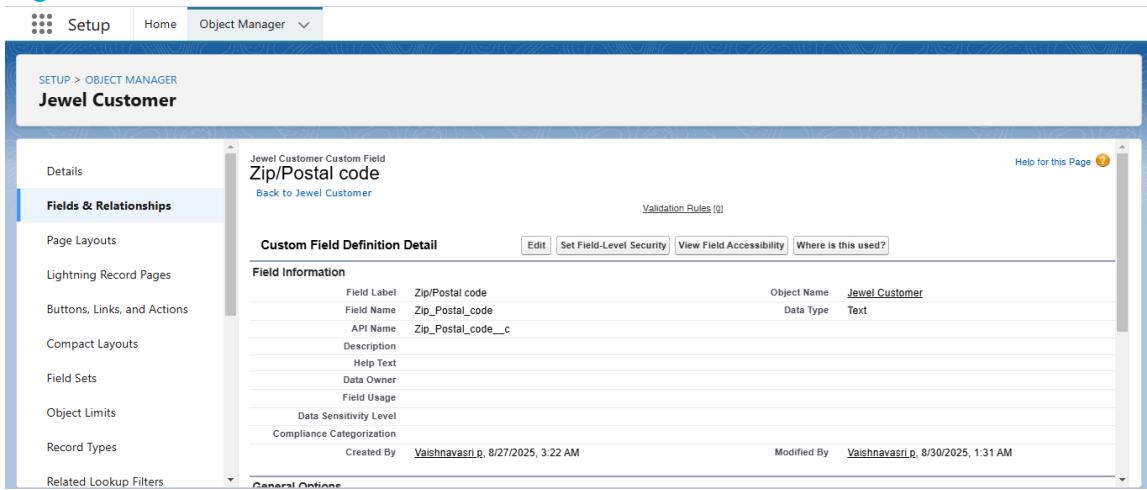
Custom Field Definition Detail

Field Label	Street	Object Name	Jewel Customer
Field Name	Street	Data Type	Text
API Name	Street__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Vaishnavasri.p, 8/30/2025, 1:28 AM	Modified By	Vaishnavasri.p, 8/30/2025, 1:28 AM

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A custom field named 'Country' is being edited for the 'Jewel Customer' object. The field has a label 'Country', a name 'Country', and an API name 'Country__c'. It is a text field with no validation rules.

Custom Field Definition Detail

Field Label	Country	Object Name	Jewel Customer
Field Name	Country	Data Type	Text
API Name	Country__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Vaishnavasri.p, 8/30/2025, 1:29 AM	Modified By	Vaishnavasri.p, 8/30/2025, 1:29 AM



SETUP > OBJECT MANAGER
Jewel Customer

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Custom Field Definition Detail

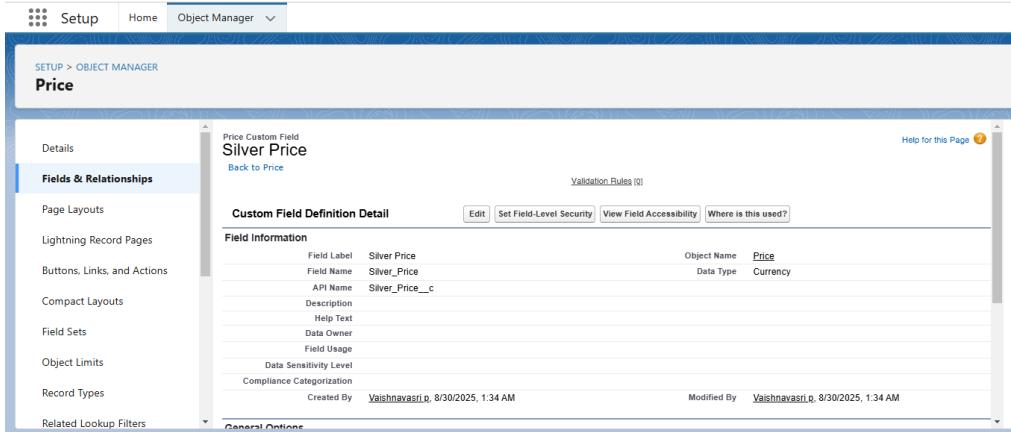
Field Information

Field Label	Zip/Postal code	Object Name	Jewel Customer
Field Name	Zip_Postal_code	Data Type	Text
API Name	Zip_Postal_code_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By: Vaishnavasri P, 8/27/2025, 3:22 AM Modified By: Vaishnavasri P, 8/30/2025, 1:31 AM

Validation Rules (0) Help for this Page (?)

General Options



SETUP > OBJECT MANAGER
Price

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Custom Field Definition Detail

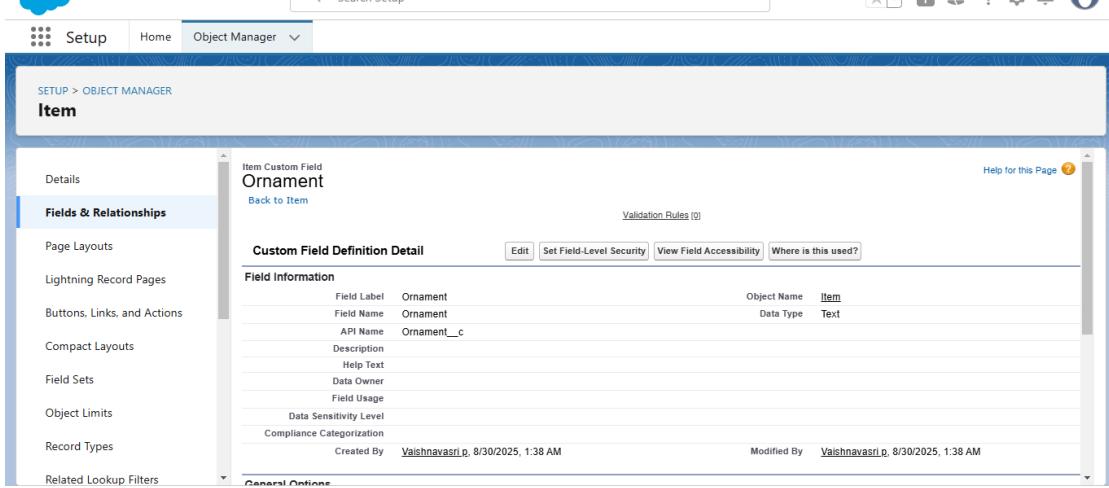
Field Information

Field Label	Silver Price	Object Name	Price
Field Name	Silver_Price	Data Type	Currency
API Name	Silver_Price_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By: Vaishnavasri P, 8/30/2025, 1:34 AM Modified By: Vaishnavasri P, 8/30/2025, 1:34 AM

Validation Rules (0) Help for this Page (?)

General Options



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

Custom Field Definition Detail

Field Information

Field Label	Ornament	Object Name	Item
Field Name	Ornament	Data Type	Text
API Name	Ornament_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By: Vaishnavasri P, 8/30/2025, 1:38 AM Modified By: Vaishnavasri P, 8/30/2025, 1:38 AM

Validation Rules (0) Help for this Page (?)

General Options

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

Item Custom Field
Stone Weight

Back to Item

Custom Field Definition Detail

Validation Rules (0)

Edit | Set Field-Level Security | View Field Accessibility | Where is this used?

Field Information

Field Label	Stone Weight	Object Name	Item
Field Name	Stone_Weight	Data Type	Number
API Name	Stone_Weight__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By: Vaishnavasri D, 8/30/2025, 1:48 AM Modified By: Vaishnavasri D, 8/30/2025, 1:48 AM

General Options

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

Item Custom Field
Weight

Back to Item

Custom Field Definition Detail

Validation Rules (0)

Edit | Set Field-Level Security | View Field Accessibility | Where is this used?

Field Information

Field Label	Weight	Object Name	Item
Field Name	Weight	Data Type	Number
API Name	Weight__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By: Vaishnavasri D, 8/30/2025, 1:41 AM Modified By: Vaishnavasri D, 8/30/2025, 1:41 AM

General Options

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

Item Custom Field
Expected Days Of Return

Back to Item

Custom Field Definition Detail

Validation Rules (0)

Edit | Set Field-Level Security | View Field Accessibility | Where is this used?

Field Information

Field Label	Expected Days Of Return	Object Name	Item
Field Name	Expected_Days_Of_Return	Data Type	Picklist
API Name	Expected_Days_Of_Return__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By: Vaishnavasri D, 8/31/2025, 5:42 AM Modified By: Vaishnavasri D, 8/31/2025, 5:42 AM

General Options

Setup Home Object Manager

SETUP > OBJECT MANAGER Item

Item Custom Field Purity Gold Price Back to Item

Custom Field Definition Detail Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Purity Gold Price	Object Name	Item
Field Name	Purity_Gold_Price		
API Name	Purity_Gold_Price_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Vaishnavasri.p, 8/30/2025, 2:01 AM	Modified By	Vaishnavasri.p, 8/30/2025, 2:01 AM

Related Lookup Filters

Setup Home Object Manager

SETUP > OBJECT MANAGER Item

Item Custom Field KDM Back to Item

Custom Field Definition Detail Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	KDM	Object Name	Item
Field Name	KDM		
API Name	KDM_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Vaishnavasri.p, 8/30/2025, 2:09 AM	Modified By	Vaishnavasri.p, 8/30/2025, 2:09 AM

Related Lookup Filters

Setup Home Object Manager

SETUP > OBJECT MANAGER Item

Item Custom Field Making Charges Back to Item

Custom Field Definition Detail Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Making Charges	Object Name	Item
Field Name	Making_Charges		
API Name	Making_Charges_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Vaishnavasri.p, 8/30/2025, 2:10 AM	Modified By	Vaishnavasri.p, 8/30/2025, 2:10 AM

Related Lookup Filters

SETUP > OBJECT MANAGER

Item

Fields & Relationships

Item Custom Field Percentage

Custom Field Definition Detail

Field Label	Percentage	Object Name	Item
Field Name	Percentage	Data Type	Number
API Name	Percentage__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Vaishnavasri P. 8/30/2025, 1:49 AM	Modified By	Vaishnavasri P. 8/30/2025, 1:49 AM

General Options

SETUP > OBJECT MANAGER

Item

Fields & Relationships

Item Custom Field Purity Gold Price

Custom Field Definition Detail

Field Label	Purity Gold Price	Object Name	Item
Field Name	Purity_Gold_Price	Data Type	Number
API Name	Purity_Gold_Price__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Vaishnavasri P. 8/30/2025, 2:01 AM	Modified By	Vaishnavasri P. 8/30/2025, 2:01 AM

General Options

Setup > Object Manager > Item

Item Custom Field Weight

Custom Field Definition Detail

Field Information	Object Name	Data Type
Field Label: Weight	Item	Number
Field Name: Weight		
API Name: Weight_c		
Description:		
Help Text:		
Data Owner:		
Field Usage:		
Data Sensitivity Level:		
Compliance Categorization:		
Created By: Vaishnavari_P_8/30/2025, 1:41 AM	Modified By: Vaishnavari_P_8/30/2025, 1:41 AM	

General Options

Setup > Object Manager > Item

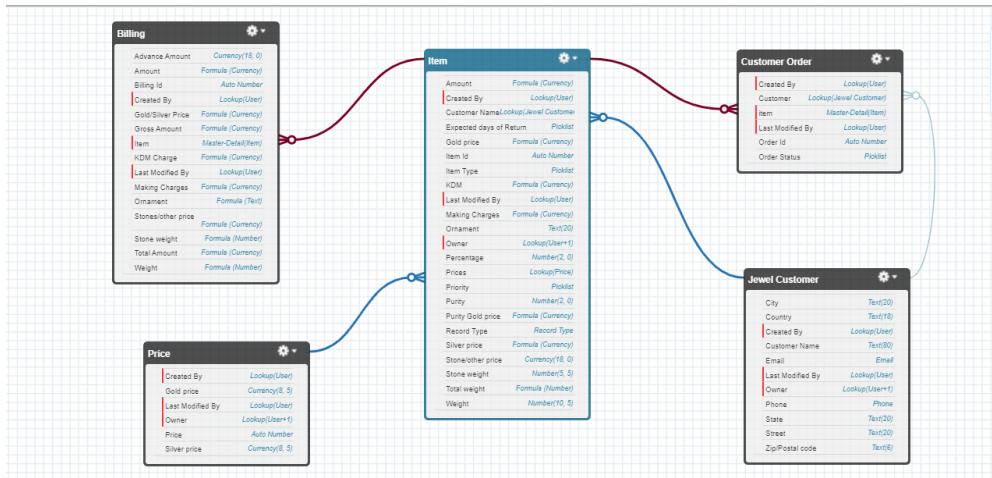
Item Custom Field Silver Price

Custom Field Definition Detail

Field Information	Object Name	Data Type
Field Label: Silver Price	Item	
Field Name: Silver_Price		
API Name: Silver_Price_c		
Description:		
Help Text:		
Data Owner:		
Field Usage:		
Data Sensitivity Level:		
Compliance Categorization:		
Created By: Vaishnavari_P_8/30/2025, 1:57 AM	Modified By: Vaishnavari_P_8/30/2025, 1:57 AM	

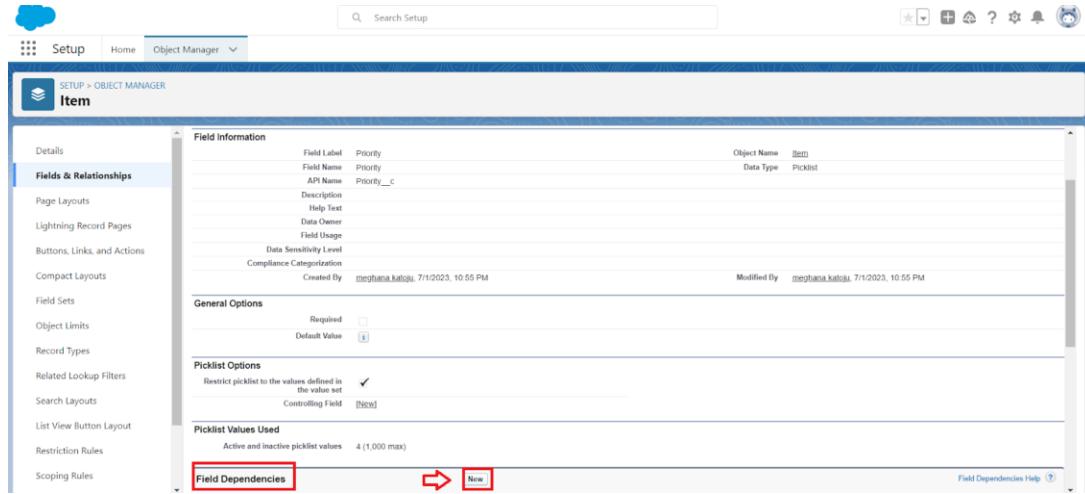
General Options

Schema Builder

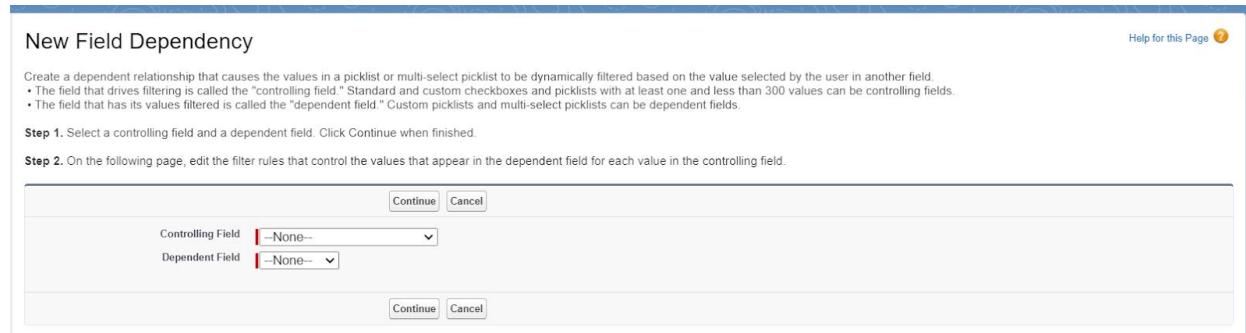


Creating the Field Dependencies

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.



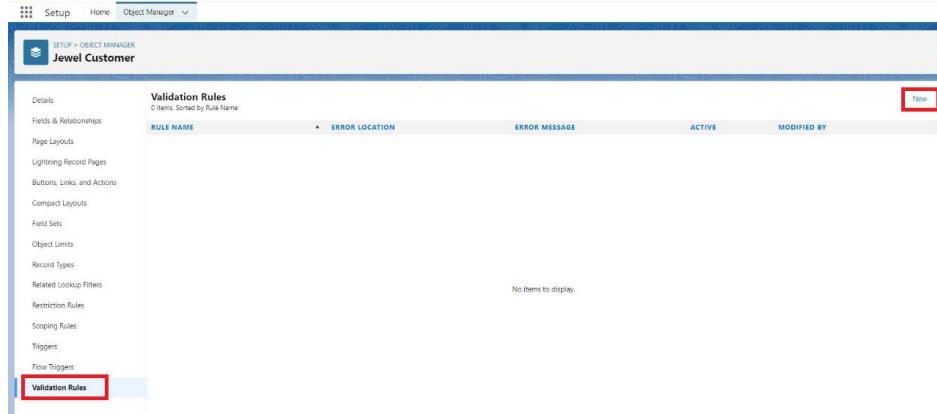
5. Select the "Expected Days of Return" values of related Priority values and Click on Include Values >> Save.

Creating the validation rule

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

1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar>> click on the object.

- Click on the validation rule >> click New.



- Enter the Rule name as "Postal Code".
- Insert the Error Condition Formula as :-

AND(

OR(

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

)

)

- Enter the Error Message as "Must contain 6 digits", select the Error location as Field and select the field as "Zip/Postal code", and click Save.

Activity 1:

Create One more Validation rule for Jewel Customer object.

- Enter Rule name as "ValidationRule For JewelCustomerObject".
- Insert the Error Condition Formula as :-
OR(ISBLANK(City__c),
ISBLANK(Country__c),ISBLANK(Phone__c),ISBLANK(State__c),ISBLANK(Street__c))
- Enter the Error Message as "Please fill Required fields", select the Error location as Top of Page and click Save

Activity 2:

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

$$\text{OR(ISBLANK(Amount_c), ISBLANK(Customer_Name_c), ISBLANK(Gold_price_c), ISBLANK(KDM_c), ISBLANK(Ornament_c), ISBLANK(Percentage_c), ISBLANK(Making_Charges_c), ISBLANK(Prices_c), ISBLANK(Stone_weight_c), ISBLANK(Silver_price_c), ISBLANK(Stone_other_price_c), ISBLANK(Stone_weight_c), ISBLANK(Weight_c))}$$
3. Enter the Error Message as “Please fill Required fields”, select the Error location as Top of Page and click Save.

Milestone 6: Profiles

Gold Smith Profile

To create a new profile:

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. 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 .

Object	Basic Access					Data Administration	
	Read	Create	Edit	Delete	View All	Modify All	
Assets	<input type="checkbox"/>						
Asset Services	<input type="checkbox"/>						
Billings	<input checked="" type="checkbox"/>						
Book1	<input type="checkbox"/>						
Book2	<input type="checkbox"/>						
Bot Commands	<input type="checkbox"/>						
Brokers	<input type="checkbox"/>						
Buyers	<input type="checkbox"/>						
Candidates	<input type="checkbox"/>						
Customer Orders	<input checked="" type="checkbox"/>						

Object	Basic Access					Data Administration	
	Read	Create	Edit	Delete	View All	Modify All	
Items	<input checked="" type="checkbox"/>						
Jewel Customers	<input checked="" type="checkbox"/>						
Job Applications	<input type="checkbox"/>						
Job Postings	<input type="checkbox"/>						
Job Posting Sites	<input type="checkbox"/>						
Positions	<input type="checkbox"/>						
Prices	<input checked="" type="checkbox"/>						
Projects	<input type="checkbox"/>						
ProjectTasks	<input type="checkbox"/>						
Properties	<input type="checkbox"/>						

4. Scroll down and Click on Save.

Profile
Gold Smith

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail

Name	Gold Smith	Edit	Clone	Delete	View Users
User License	Salesforce	Custom Profile <input checked="" type="checkbox"/>			
Description					
Created By	Vaishnavasri.p	Created On	8/31/2025, 6:06 AM	Modified By	Vaishnavasri.p
Page Layouts					

Worker Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Salesforce Platform User) >> enter profile name () >> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Items,Price and Customer Order objects.
4. Scroll down and Click on Save.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The search bar at the top contains 'profi'. The left sidebar shows 'Users' and 'Profiles' under 'Profiles'. The main content area displays the 'Worker' profile details. The 'Profile Detail' section includes fields for Name (Worker), User License (Salesforce Platform), Description, Created By (Vaishnavasri P.), and Modified By (Vaishnavasri P.). Below this is the 'Page Layouts' section, which is currently empty.

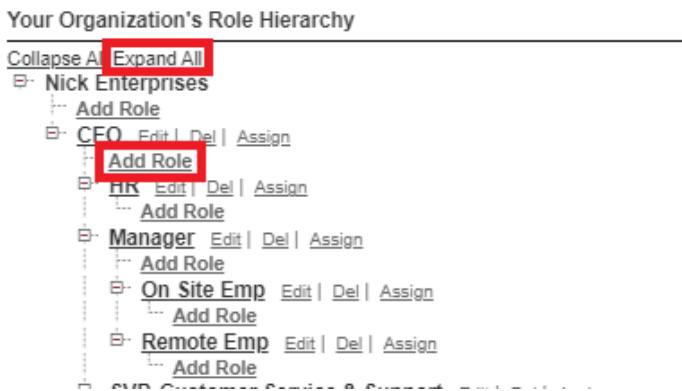
Milestone 7: Roles

Creating Gold Smith Role

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

The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. The search bar at the top contains 'roles'. The left sidebar shows 'Users' and 'Roles' under 'Roles'. The main content area displays a 'Sample Role Hierarchy' diagram. The hierarchy starts with 'Executive Staff' (CEO, President, CFO, VP, Sales) at the top level. Below them are 'Western Sales Director' (West Sales Manager, CA Sales Rep, OR Sales Rep) and 'Eastern Sales Director' (East Sales Manager, NY Sales Rep, MA Sales Rep). At the bottom level are 'International Sales Director' (International Sales Manager, Asian Sales Rep, European Sales Rep). A legend explains the icons: a person for View & edit data, a chart for View & generate reports, and a lock for Can't access data. A red box highlights the 'Set Up Roles' button at the bottom right.

- 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. Check to whom this role (Gold Smith) reports. Then click on Save.

	Label	Role Name
This role reports to	CEO	Role Name as displayed on reports
Modified By	Vaishnavasri P.	Sharing Groups
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities	Role, Role and Internal Subordinates
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases	

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

The screenshot shows the Salesforce Setup interface. The top navigation bar includes a cloud icon, a search bar labeled "Search Setup", and various setup icons. The main menu bar has "Setup" selected, along with "Home" and "Object Manager". A sidebar on the left lists categories like "Users", "Roles" (which is selected and highlighted in yellow), "Feature Settings", "Sales", "Service", and "Case Teams". Under "Roles", there are links to "Contact Roles on Contracts" and "Contact Roles on Opportunities". The main content area displays the "Role Worker" page. It shows the role hierarchy ("Hierarchy: navarasam arts and science college for women » CEO » Worker") and siblings ("Siblings: SVP_Sales & Marketing, SVP_Customer Service & Support, CFO, SVP_Human Resources, COO, Gold Smith"). A link to "Assign Users to Role" is present. The "Role Detail" section shows the role name "Worker", its label "Worker", and its reporting relationship to "CEO". It also lists "Modified By" (Vaishnavasri P.), "Opportunity Access" (Users can edit all opportunities), and "Case Access" (Users can edit all cases). A "Sharing Groups" section lists "Role, Role and Internal Subordinates". A note at the bottom says "Users in Worker Role (1)".

Milestone 8: Users

Create User

Activity 1:

1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
 1. First Name : Niklaus
 2. Last Name : Mikaelson
 3. Alias : Give a Alias Name

4. Email id : Give your Personal Email id
5. Username : Username should be in this form: [text@text.text](#)
6. Nick Name : Give a Nickname
7. Role : Gold Smith
8. User licence : Salesforce
9. Profiles : Gold Smith

The screenshot shows the Salesforce Setup interface. The top navigation bar includes a cloud icon, a search bar labeled 'Search Setup', and various global buttons. The main content area is titled 'Users' and shows a detailed view of a user named 'Niklaus Mikaelson'. The 'User Detail' section contains fields for Name, Alias, Email, Username, Nickname, and various user roles like 'Role', 'User License', and 'Profile'. Below this, there are sections for 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', and 'Site.com Contributor User'. On the left sidebar, under 'User Management Settings', the 'Users' option is currently selected. Other options like 'Feature Settings', 'Data.com', 'Prospector Users', and 'Service' are also listed.

Activity 2:

1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
 - First Name : Kol
 - Last Name : Mikaelson
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: [text@text.text](#)
 - Nick Name : Give a Nickname
 - Role : Worker
 - User licence : Salesforce Platform
 - Profiles : Worker
3. Save.

Milestone 9: Page layouts

To Create a Gold Page layout

1. Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.
2. Click on Page layout >> Click on New.
3. Give Page layout Name as “Page Layout for Gold” and click on Save and New.
4. Arrange the field as shown in the Information Section ,remove fields which are related to Silver and click Ok.
5. Click Save.
6. Make sure your page layout looks like the picture above.

To Create a Silver Page layout

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

The screenshot shows the Salesforce Object Manager interface for the 'Item' object. The 'Page Layouts' tab is selected in the left sidebar. The main area displays the layout properties for the 'Item' record. A red arrow points to the 'Amount' field, which is highlighted in blue, indicating it is being edited or selected. Other visible fields include Customer Name, Price, Item Type, Ornament, Silver Price, Weight, Stone Weight, Stone/Other Price, Total Weight, Percentage, KDM, Making Charges, Purity, priority, and Expected Days Of Return. The status bar at the bottom indicates 'System Information (Header visible on edit only)'.

Milestone 10: Record Types

To create a Record Type

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

The screenshot shows the Salesforce Object Manager interface for the 'Item' object. The 'Record Types' link in the left sidebar is highlighted with a red box and a red arrow pointing to it. The main area displays a table titled 'Record Types' with two items: 'Gold' and 'Silver'. The 'Gold' record has a description of 'Gold items information' and was modified by 'meghana katoju' on 7/18/2023, 11:45 AM. The 'Silver' record has a description of 'Silver items information' and was also modified by 'meghana katoju' on the same date and time. The table includes columns for 'RECORD TYPE LABEL', 'DESCRIPTION', 'ACTIVE', and 'MODIFIED BY'.

3. Select Existing Record as “Master”, Record type Label as “Gold”, Description as “Gold items information”.
4. Uncheck for “Make Available”.

Profile Name	Record Types Currently Available	<input type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Analytics Cloud Integration User		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter External User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter Free User		<input type="checkbox"/>	<input type="checkbox"/>

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

Profile Name	Record Types Currently Available	<input checked="" type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Customer Portal Manager Standard		<input type="checkbox"/>	<input type="checkbox"/>
External Apps Login User		<input type="checkbox"/>	<input type="checkbox"/>
External Identity User		<input type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
Gold Smith	Gold (Default), Silver	<input checked="" type="checkbox"/>	<input type="checkbox"/>
High Volume Customer Portal		<input type="checkbox"/>	<input type="checkbox"/>
High Volume Customer Portal User		<input type="checkbox"/>	<input type="checkbox"/>
HR	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
HR Recruiter	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
Identity User	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
J Worker1	Gold (Default), Silver	<input checked="" type="checkbox"/>	<input type="checkbox"/>
J Worker2	Gold (Default), Silver	<input checked="" type="checkbox"/>	<input type="checkbox"/>
J Worker3	Gold (Default), Silver	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Manager	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
Marketing User	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
Partner Admin - Salesforce User	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>

6. 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.

HR	Item Layout	Item Layout
HR Recruiter	Item Layout	Item Layout
Identity User	Item Layout	Item Layout
Manager	Item Layout	Item Layout
Marketing User	Item Layout	Item Layout
Minimum Access - Salesforce	Item Layout	Item Layout
Partner App Subscription User	Item Layout	Item Layout
Partner Community Login User	Item Layout	Item Layout
Partner Community User	Item Layout	Item Layout
Read Only	Item Layout	Item Layout
s1	Item Layout	Item Layout
Salesforce API Only System Integrations	Item Layout	Item Layout
Sales User	Item Layout	Item Layout
Sales User.	Item Layout	Item Layout
Silver Partner User	Item Layout	Item Layout
Solution Manager	Item Layout	Item Layout
Standard Platform User	Item Layout	Item Layout
Standard User	Item Layout	Item Layout
Support User	Item Layout	Item Layout
Support User.	Item Layout	Item Layout
System Administrator	Item Layout	Item Layout
Work.com Only User	Item Layout	Item Layout
Worker	Page layout for Gold	Page layout for Gold

Milestone 11: Permission sets

Creating permission set

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

The screenshot shows the Salesforce Setup interface. The left sidebar has 'Permission Sets' selected. The main content area is titled 'Permission Sets' and displays a list of existing permission sets. A new permission set is being created, with the 'Action' field set to 'New' and the 'Permission Set Label' field containing 'Per to Worker'. Other fields shown include 'Description' and 'License'.

2. Enter the label name as “Per to Worker”, API will be auto populated ? Save.

- 3.Under Apps Select object settings.

Apps

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

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

SETUP **Permission Sets**

Permission Set Overview > Object Settings ▾ Items ▾

Items **Save** **Cancel**

Tab Settings

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

Item: Record Type Assignments

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

Object Permissions

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

Field Permissions

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

Select Users to Assign

All Users ▾

Full Name	Alias	Username	Role	Active	Profile
Chatter Expert	Chatter	chatty.00d5000003kyzea4@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
Integration User	integ	integration@00d5000003kyzea4.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Mani deepak	mdeep	manideepak143@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Worker
Megha Katoju Site Guest User	guest	megha_katoju@00d5000003kyzea4.org.force.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Megha Katoju Profile
Meghana Katoju Site Guest User	guest	meghana_katoju@00d5000003kyzea4.org.force.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Meghana Katoju Profile

Cancel Next

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

Select an Expiration Option For Assigned Users

No expiration date ⓘ

Specify the expiration date

1 Day	1 Week	30 Days	60 Days	Custom Date
-------	--------	---------	---------	-------------

ⓘ Time Zone

Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Mani deepak	Worker	Worker	<input checked="" type="checkbox"/>	Salesforce Platform	Never Expires

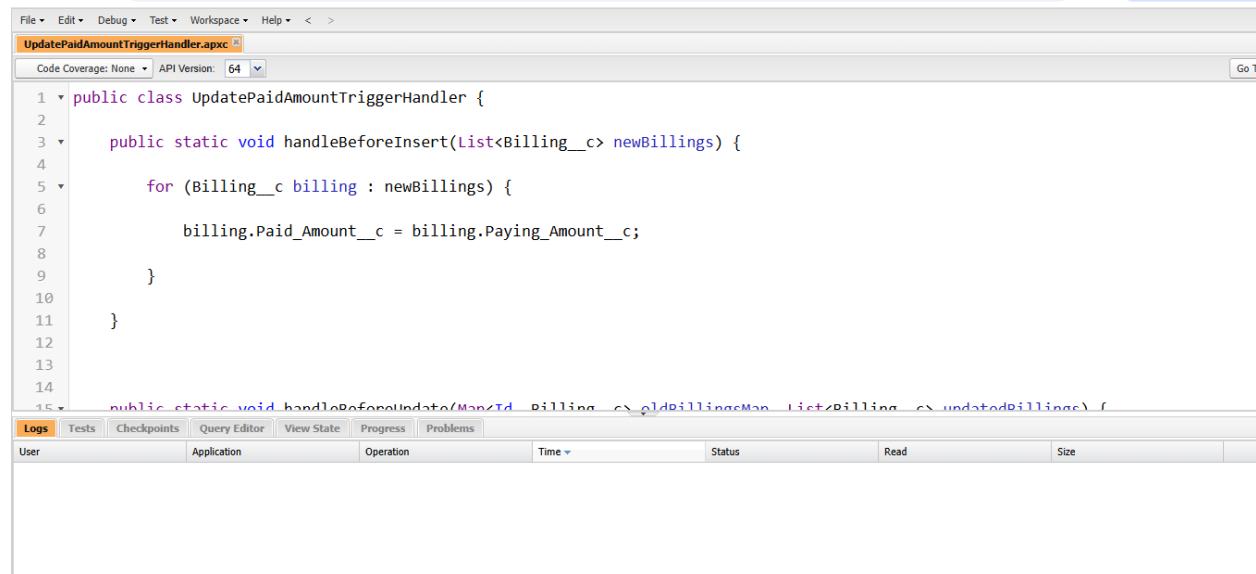
Cancel Back Assign

Milestone 12: Trigger

Create a Trigger Handler class

CODE:

```
public class UpdatePaidAmountTriggerHandler {  
  
    public static void handleBeforeInsert(List<Billing__c> newBillings) {  
        for (Billing__c billing : newBillings) {  
            billing.Paid_Amount__c = billing.Paying_Amount__c;  
        }  
    }  
  
    public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap, List<Billing__c> updatedBillings) {  
        for (Billing__c billing : updatedBillings) {  
            Billing__c oldBilling = oldBillingsMap.get(billing.Id);  
            Decimal oldPaidAmount = oldBilling.Paid_Amount__c;  
            billing.Paid_Amount__c = oldPaidAmount + billing.Paying_Amount__c;  
        }  
    }  
}
```



Create the trigger

CODE:

```
trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {  
    if (Trigger.isInsert) {  
        UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);  
    } else if (Trigger.isUpdate) {  
        UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap, Trigger.new);  
    }  
}
```

```
}
```

```

trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {
    if (Trigger.isInsert) {
        UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);
    } else if (Trigger.isUpdate) {
        UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap, Trigger.new);
    }
}

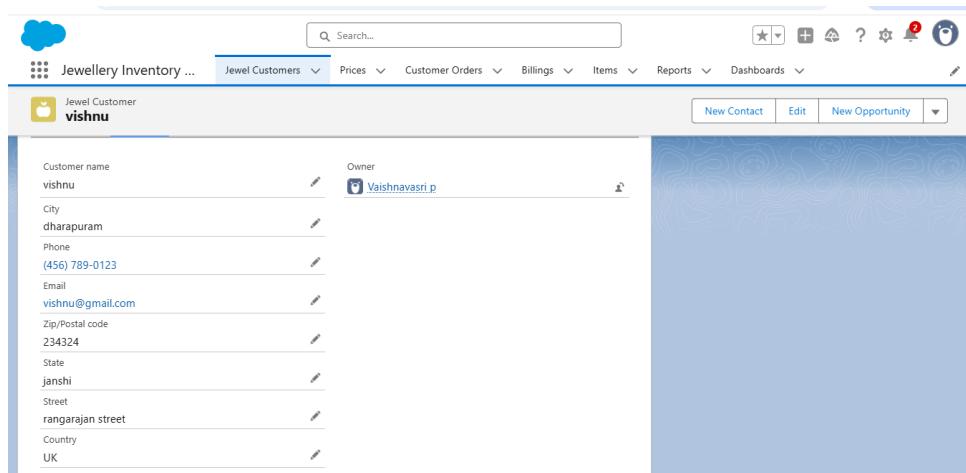
```

The screenshot shows the Salesforce IDE interface. At the top, there's a menu bar with File, Edit, Debug, Test, Workspace, Help, and a Go To button. Below the menu is a toolbar with tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The main area displays the code for the `UpdatePaidAmountTrigger.apxt` file. The code itself is a trigger on the `Billing__c` object that handles both insert and update events by calling a `handleBeforeInsert` or `handleBeforeUpdate` method from a `UpdatePaidAmountTriggerHandler`. Below the code editor is a log viewer with tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The Logs tab is selected, showing a blank list.

Milestone 13: User Adoption

Create 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 Drop Down and Click on the Jewel Customer tab.
4. Click New.
5. Fill the Details and click on Save.



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.

Jewellery Inventory ...

Jewel Customers

Recently Viewed

Customer name

	Customer name	Actions
1	vishnu	▼
2	dakshika	▼
3	sathurnaa	▼
4	karthi	▼
5	pavithra	▼
6	santhiya	▼
7	ilamathi	▼
8	dayana	▼
9	Hari	▼
10	sanafar	▼

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.

Jewellery Inventory ...

Jewel Customers

Recently Viewed

Customer name

	Customer name	Actions
1	vishnu	▼
2	dakshika	▼
3	sathurnaa	▼
4	karthi	▼
5	pavithra	▼
6	santhiya	▼
7	ilamathi	▼
8	dayana	▼
9	Hari	▼

Milestone 14: Reports

Create Report

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

The screenshot shows the Jewelry Inventory Software interface. The top navigation bar has a search bar and several icons. The 'Reports' tab is highlighted with a red box. The sidebar on the left is titled 'Recent' and lists '12 Items'. Under 'REPORTS', there are sections for 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'Folders', 'All Folders', 'Created by Me', 'Shared with Me', and 'Favorites'. The 'Recent' section contains items like 'New Report billing w/ order', 'New Items with Bill...', 'New Prices Report', 'Days on Market', 'New Billings with It...', 'New Billings with It...', 'New Opportunities Report', 'New Accounts Report', 'New orders Report', 'New Billings with Price Report', 'Copy of New Report', and 'New Employees Report'. A red box highlights the 'Reports' category in the sidebar. The main area displays a table of reports with columns: 'Folder', 'Created By', 'Created On', and 'Subscribed'. The table lists various reports created by meghana katoju on different dates.

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

4. Customise your report

The screenshot shows the Jewelry Inventory Software Report Builder for a 'New Prices Report'. The top navigation bar includes a search bar and various icons. The main area is titled 'Jewelry Inventory S... Prices' and shows a preview of the report. The left pane is titled 'REPORT' and shows 'Outline' and 'Filters'. The 'Outline' section has a 'Groups' section with 'GROUP ROWS' and an 'Add group...' button. The 'Columns' section has an 'Add column...' button highlighted with a red box. Below it are columns for 'Price: Price' (p-022, p-021, p-027, p-029, p-030, p-026, p-025, p-028, p-024, p-023). The right side of the screen shows the report preview with a list of 10 rows. The top right of the preview area has buttons for 'Add Chart', 'Save & Run', 'Save', 'Close', and 'Run' (highlighted with a red box).

- Add fields from the left pane as shown below.
5. Save or run it.

The screenshot shows the Report Builder interface with the following details:

- Report Title:** New Prices Report
- Report Type:** Prices
- Preview Message:** Previewing a limited number of records. Run the report to see everything.
- Update Preview Automatically:** A toggle switch is turned off.
- Table Data:**

	Price: Price	Gold price	Silver price
1	p-022	₹60,000.0000	₹71,000.0000
2	p-021	₹63,000.0000	₹72,000.0000
3	p-027	₹62,350.0000	₹70,200.0000
4	p-029	₹58,700.0000	₹69,000.0000
5	p-030	₹66,000.0000	₹78,000.0000
6	p-026	₹62,000.0000	₹70,000.0000
7	p-025	₹58,000.0000	₹69,000.0000
8	p-028	₹59,900.0000	₹73,000.0000
9	p-024	₹62,000.0000	₹73,000.0000
10	p-023	₹58,000.0000	₹69,000.0000
11		₹609,950.0000	₹714,200.0000

Reports

1. Create a report with report type: "Item with Billings".
2. Create a report with report type: "Billings with item and Customer order".

Milestone 15: Dashboards

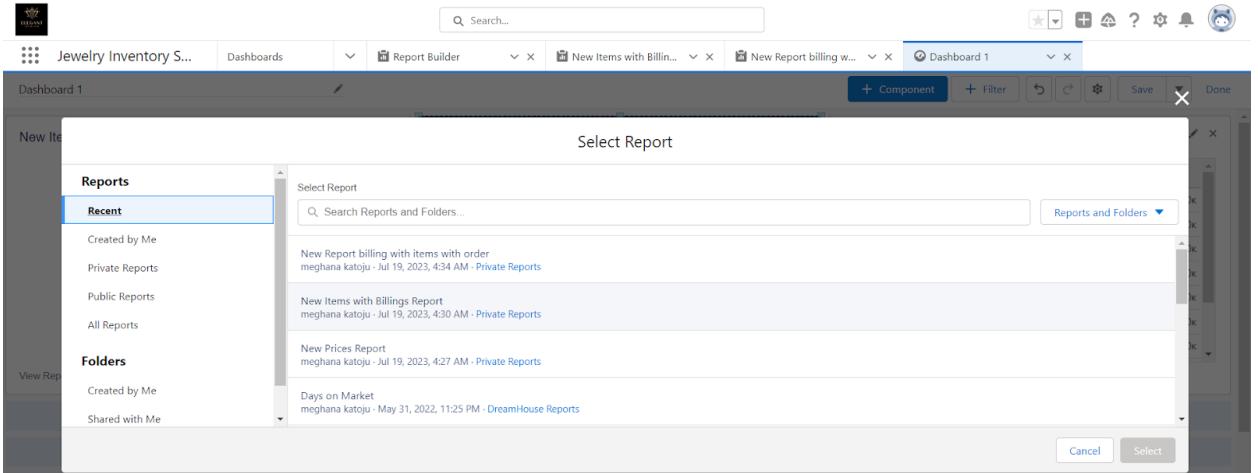
Create Dashboard

1. Go to the app >> click on the Dashboards tabs.
2. Give a Name and click on Create.
3. Select add component.

The screenshot shows the Dashboard creation interface with the following details:

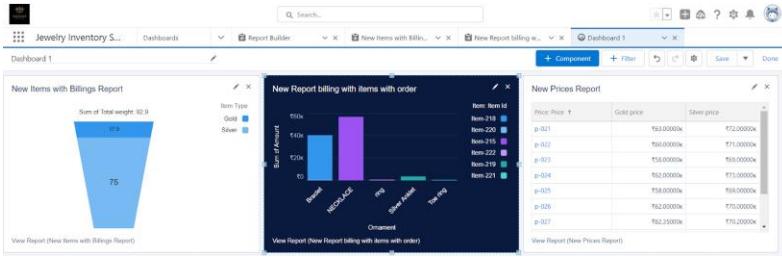
- Dashboard Name:** Dashboard 1
- Add Component Button:** A red box highlights the '+ Component' button in the top right corner of the dashboard area.

4. Select a Report and click on select.



- Click Add then click on Save and then click on Done.

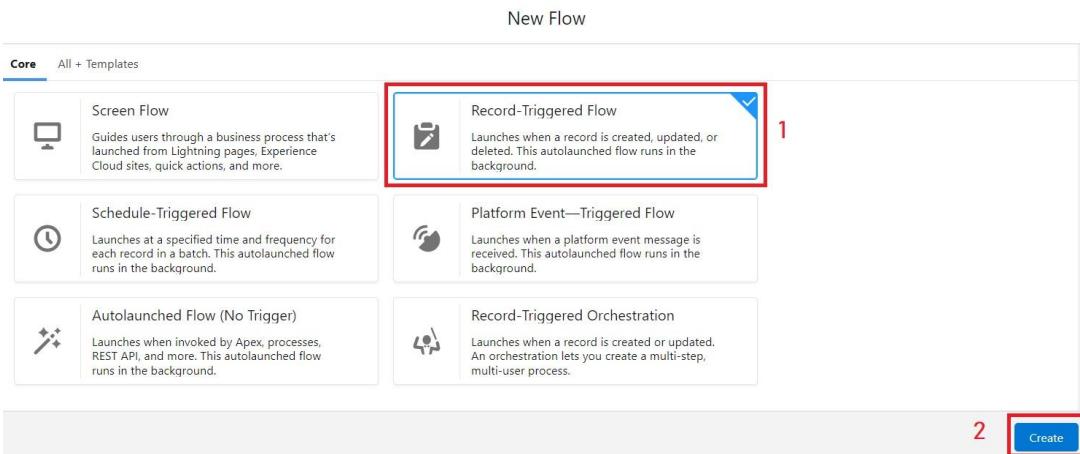
Activity 2: Create another Dashboard as we discussed in



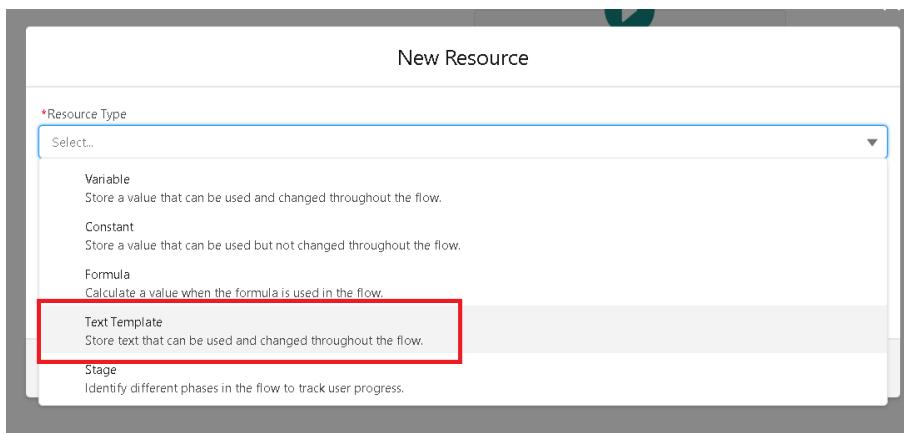
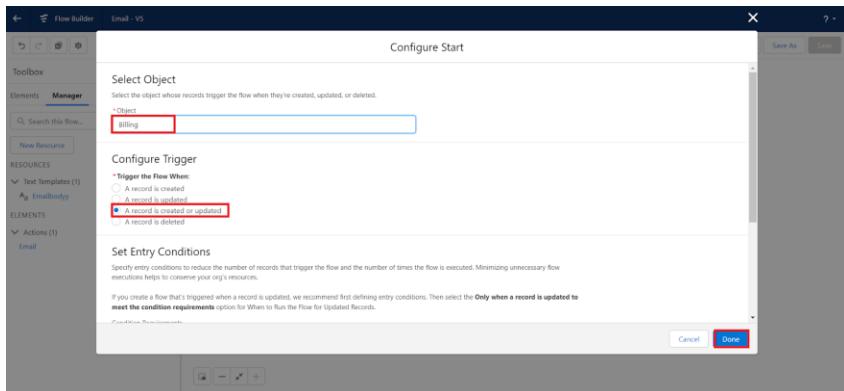
Milestone 16: Flows

Create a Flow

- Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.
- Select the Record-triggered flow and Click on Create.



3. Select the Object as a “Billing” in the Drop down list.
4. Select the Trigger Flow when: “A record is Created or Updated”.
5. Select the Optimise the flow for: “Actions and Related Records” and Click on Done.
6. Now change the mode form Auto-layout to free-form.
7. Now select the manger option in the toolbox, click New resource.
8. Select the resource type as text template

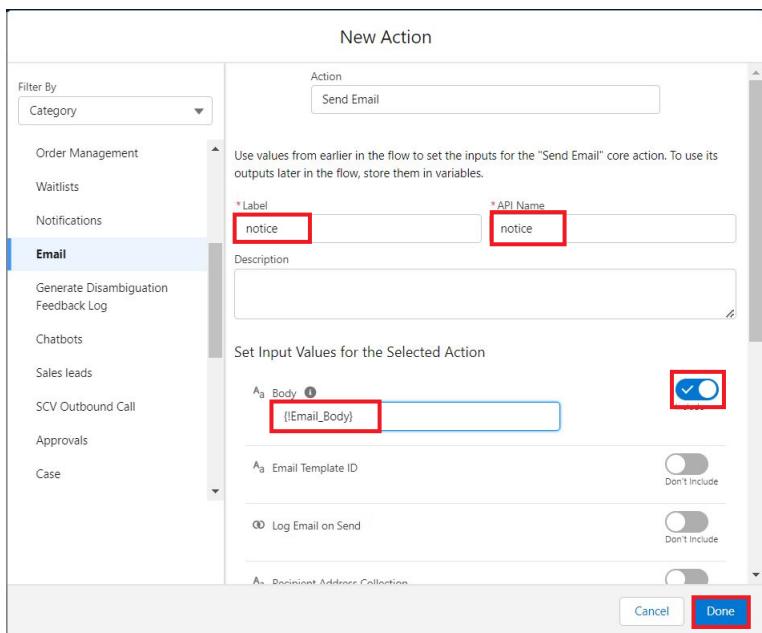


The screenshot shows the 'Edit Text Template' dialog. The 'API Name' field is filled with 'EmailBody' and highlighted with a red box. The 'Body' section contains the text 'Hello' and 'Customer Name: {!\$Record.Item__r.Customer_Name__r.Name}'.

10. Change the view as Rich Text ? View to Plain Text.
 11. In the body field paste the syntax that is given below.

```
Hello
Customer Name: {!$Record.Item__r.Customer_Name__r.Name}
Here are the details for the item you purchased with Jewellery Inventory System
Item Type: {!$Record.Item__r.Item_Type__c}
Ornament: {!$Record.Ornament__c}
Weight: {!$Record.Weight__c}grams
Amount: {!$Record.Amount__c}
```

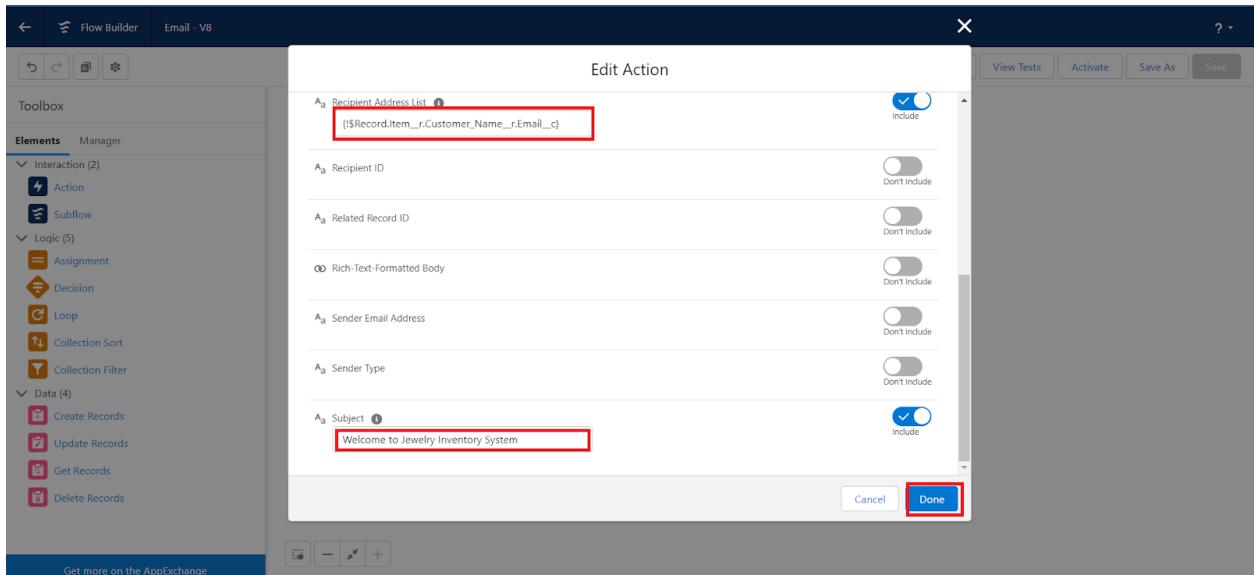
12. Click done.
13. Now click on elements, and drag the action element into the preview pane.
14. Their action bar will be opened in that search for “ send email ” and click on it.
15. Give the label name as “ notice ”
16. API name will be auto populated.
17. Enable the body in set input values for the selected action.
18. Select the text template that was created.



19. Include Recipient Address list, select the email form the record.

`({$Record.Item__r.Customer_Namer.Email_c})`

20. Include the subject as “Welcome to Jewelry Inventory System ”.
21. Click done



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

