Jewelry Management CRM Application using Salesforce

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TEAM MEMBERS:

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Jewelry Management CRM:

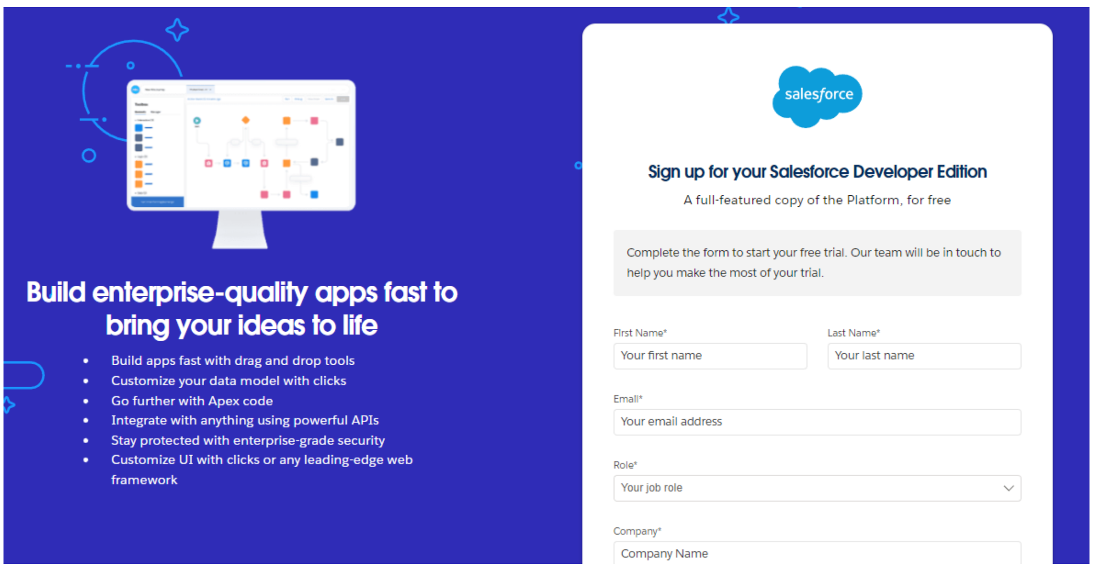
Utilizing Salesforce, our project streamlines jewelry inventory, sales, and customer management, ensuring efficiency, transparency, and better customer relationships.

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

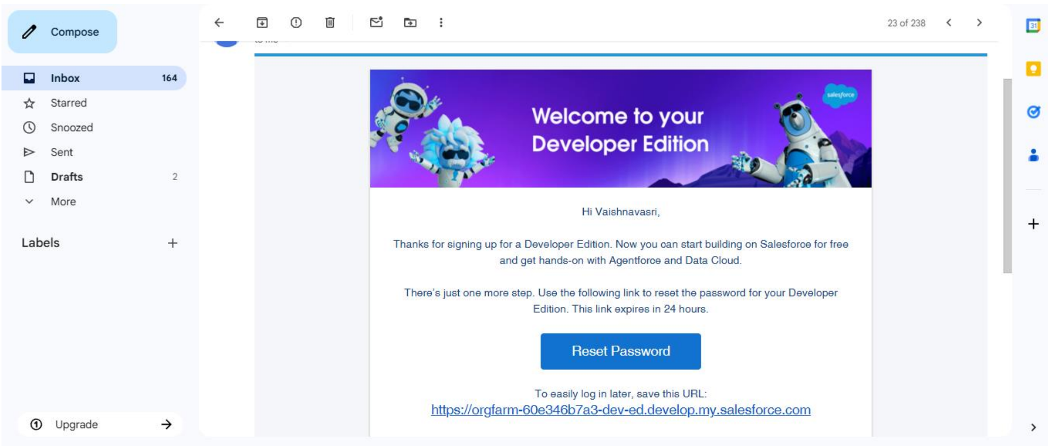
6. Postal Code : pin code

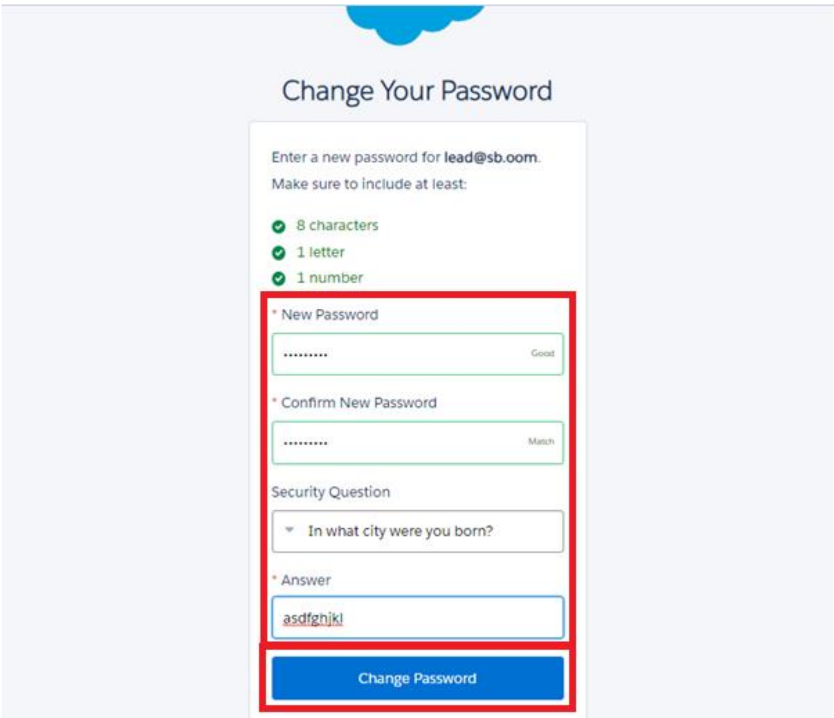
7. Username : should be a combination of your name and company

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.

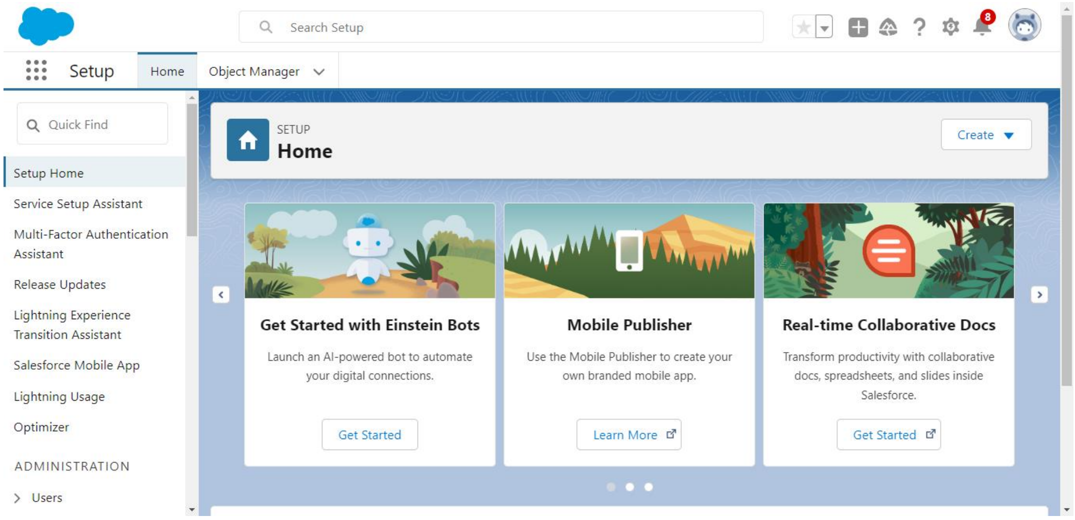




1. Click on Verify Account

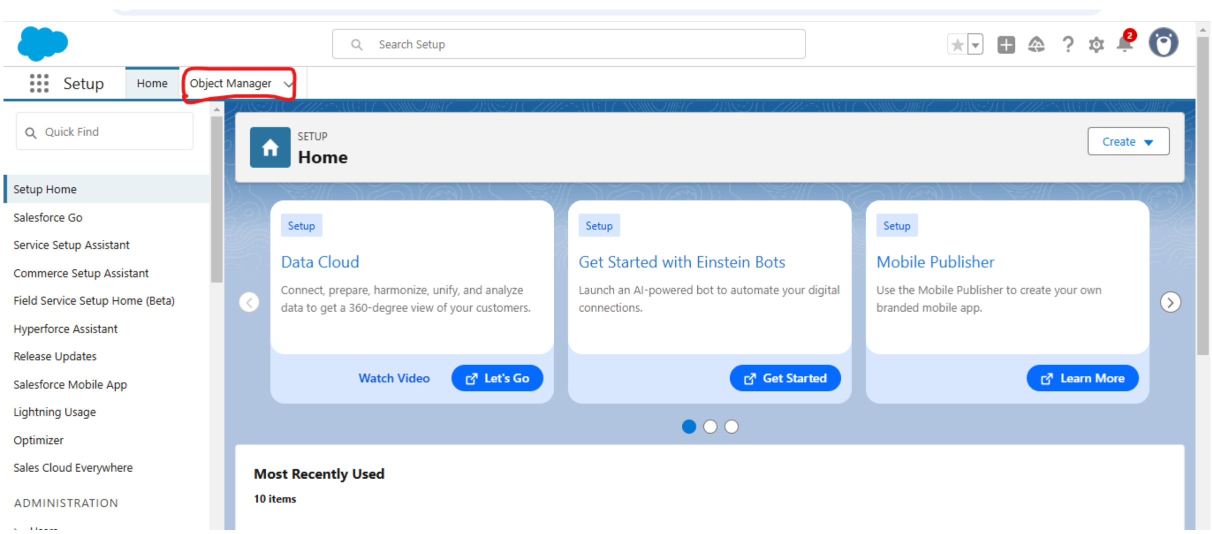
2. Give a password and answer a security question and click on change password.

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



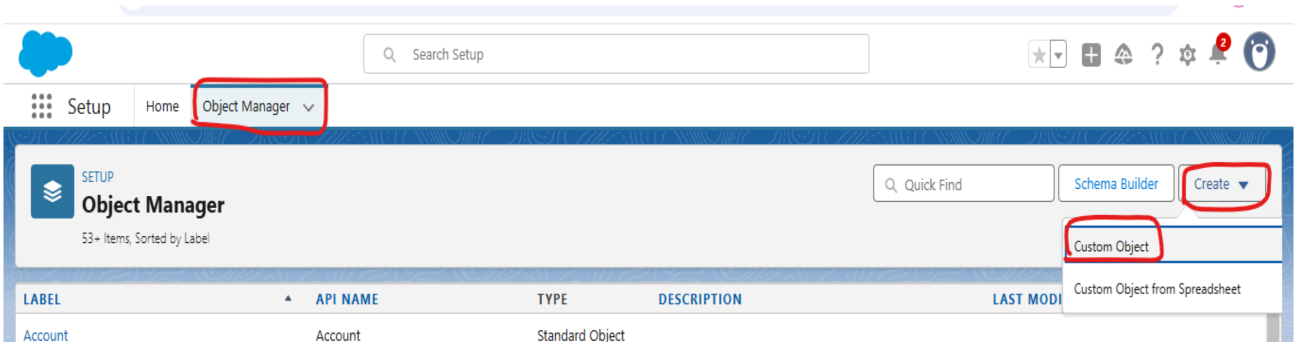
Milestone 2 : OBJECT :

To Navigate to Setup page:



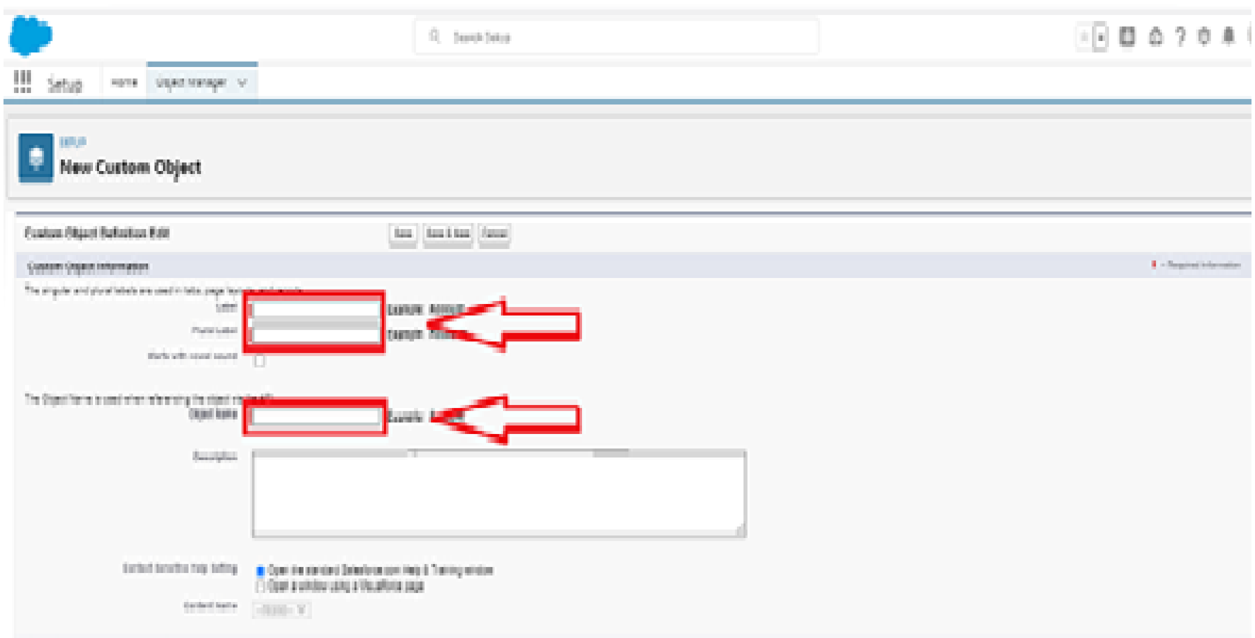
To create an object:

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



Enter the label name : Jewel Customer

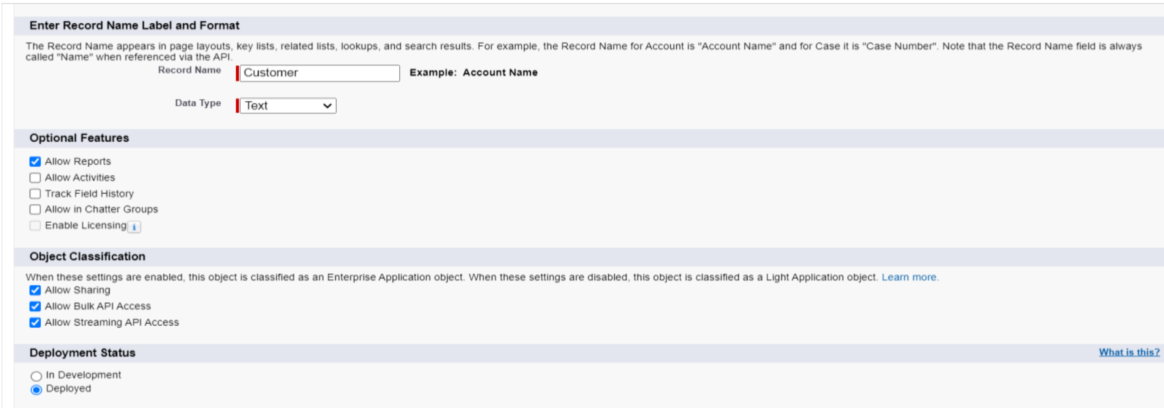
1.Plural label name : Jewel Customers



2. Enter Record Name Label and Format

•Record Name >> Customer name

•Data Type >> Text



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.

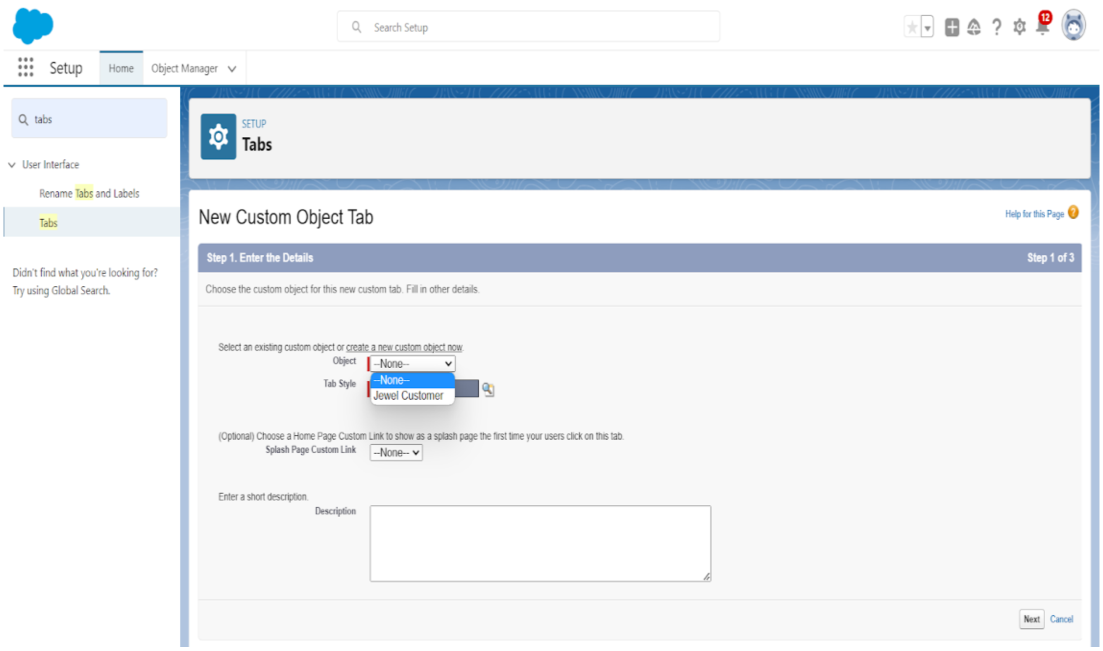
Milestone 3 : TABS :-

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)

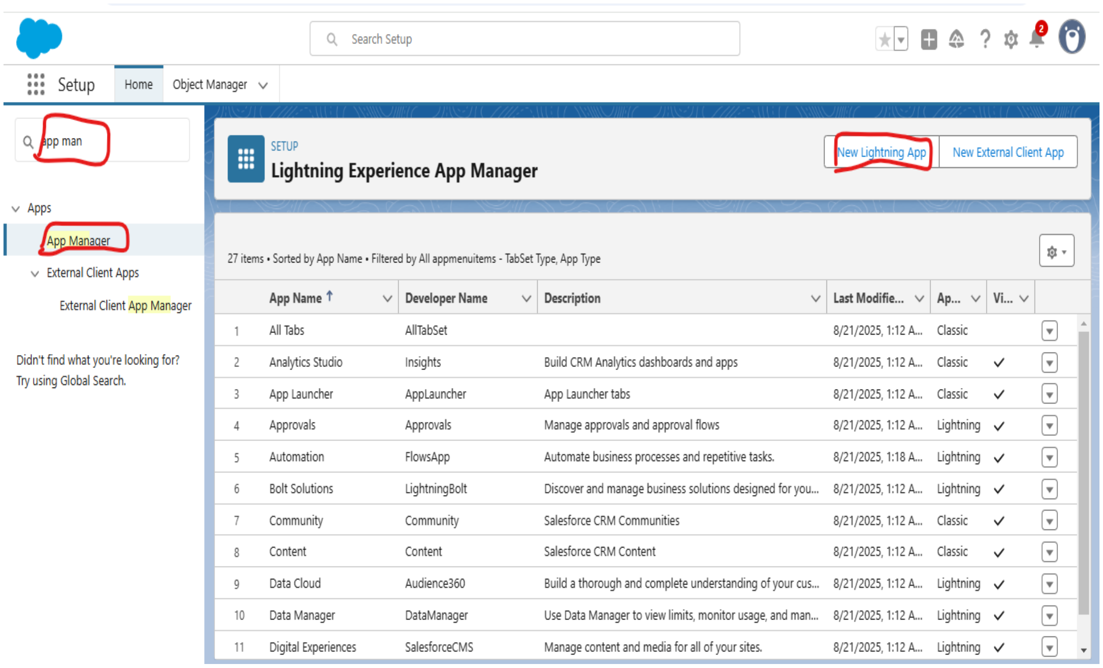
1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Item) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) keep it as default >> Save.

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.



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

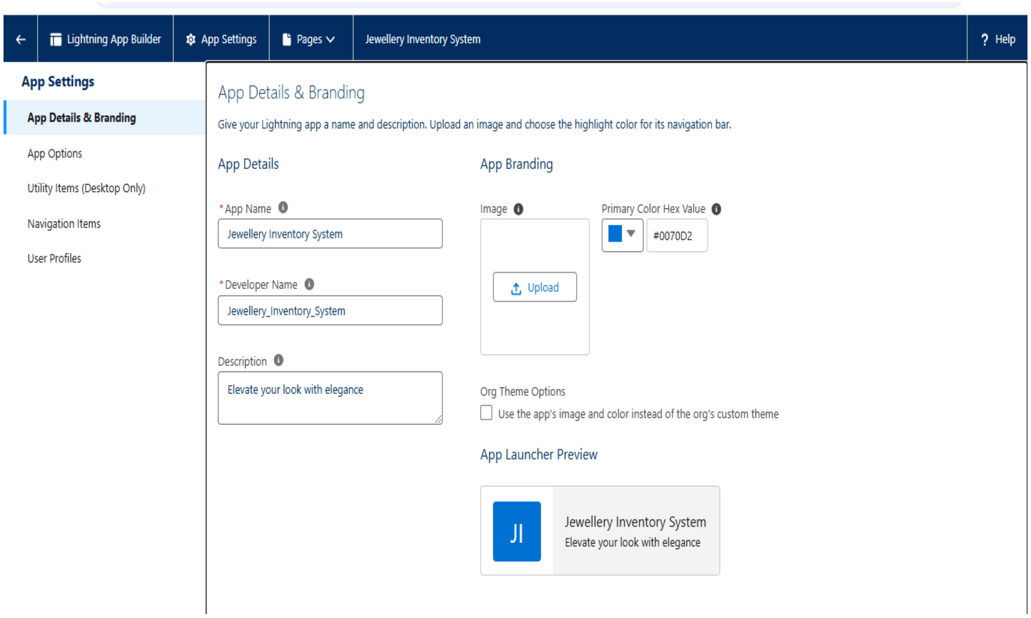
App Name : Jewellery Inventory System

Developer Name : This will auto populated

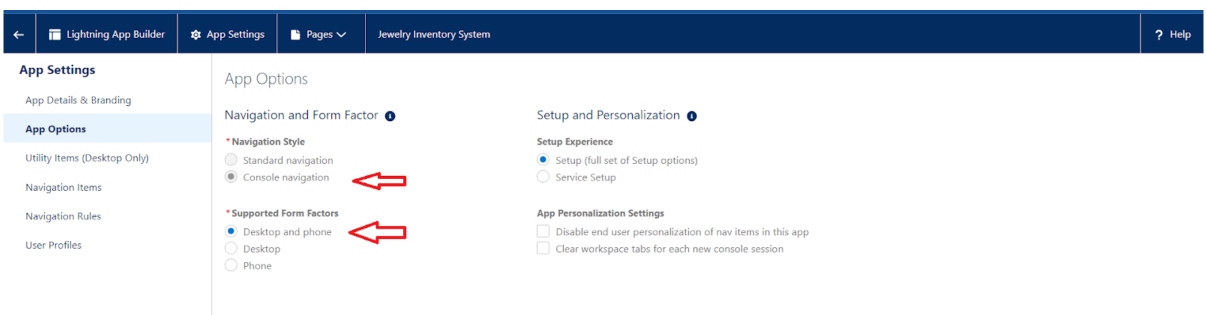
Description : Elevate your look with elegance

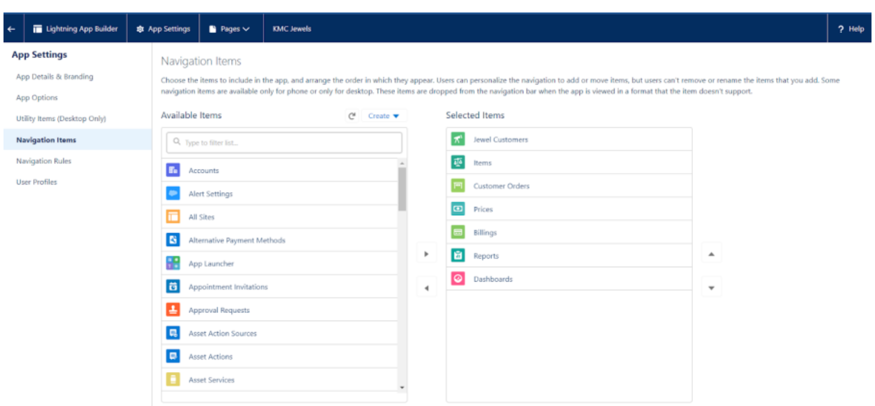
Image : optional (if you want to give any image you can otherwise not mandatory)

Primary colour hex value : keep this default.

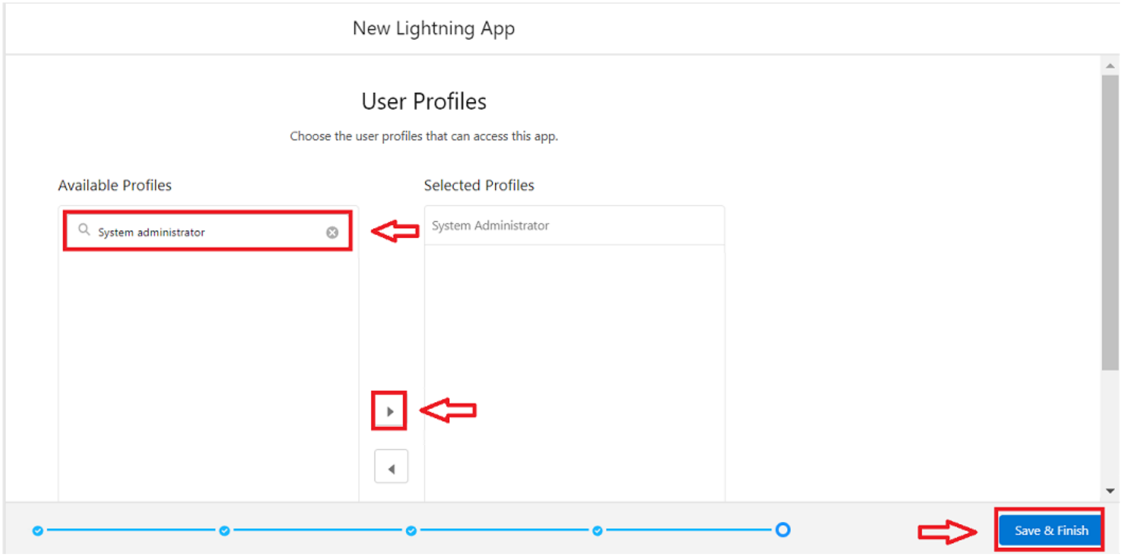


4.Then click Next >> (App option page)Set Navigation Style as Console Navigation >> Next.





4. 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.
5. To Add User Profiles:



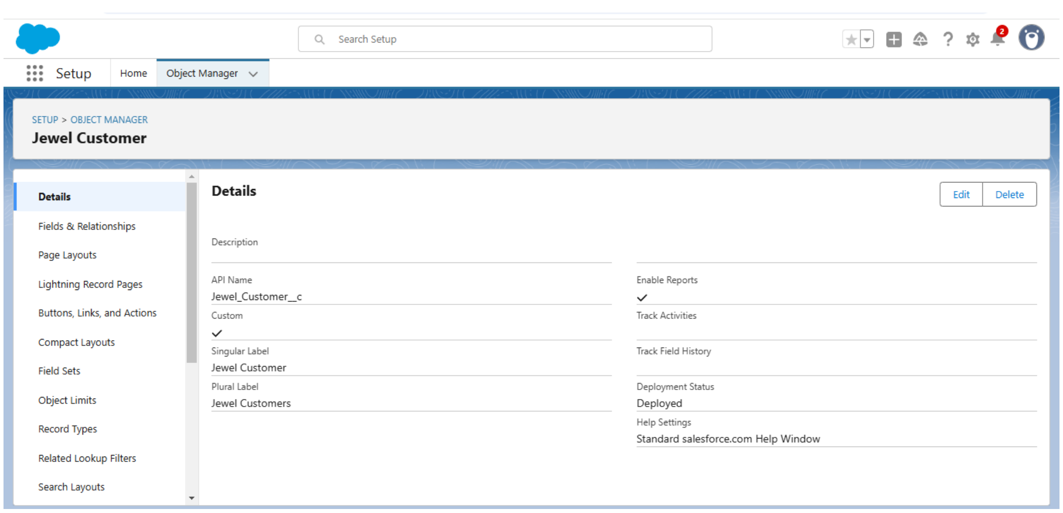
Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

Milestone 5: FIELDS :-

Creating Lookup Relationship

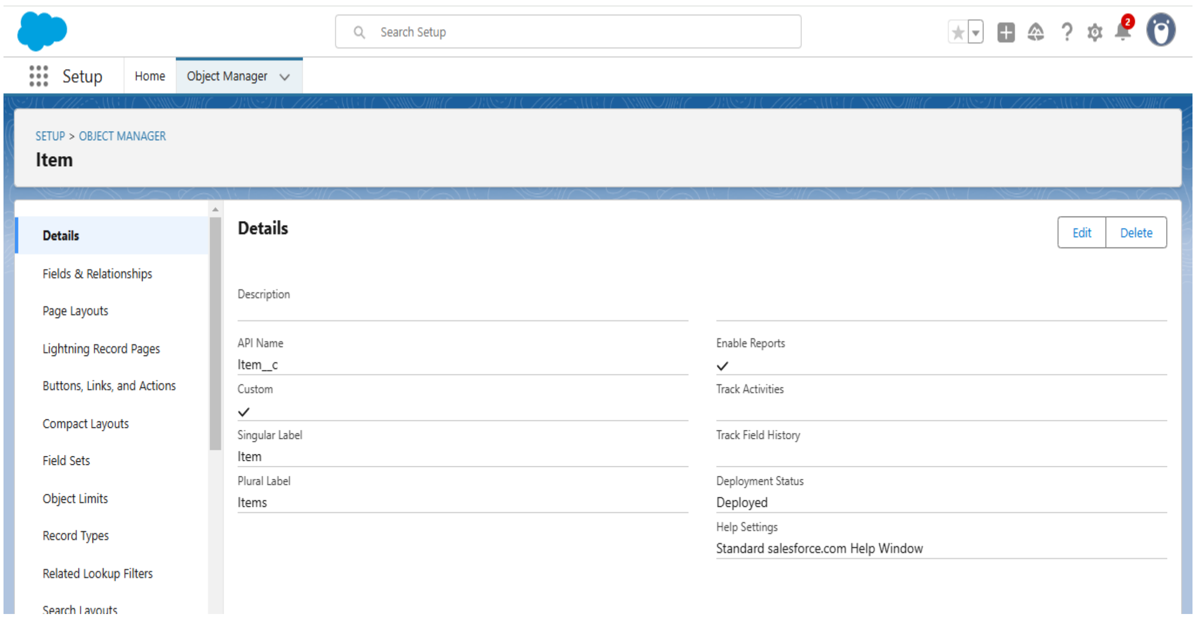
To Create a relationship between Jewel Customer & Customer Order Objects.

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

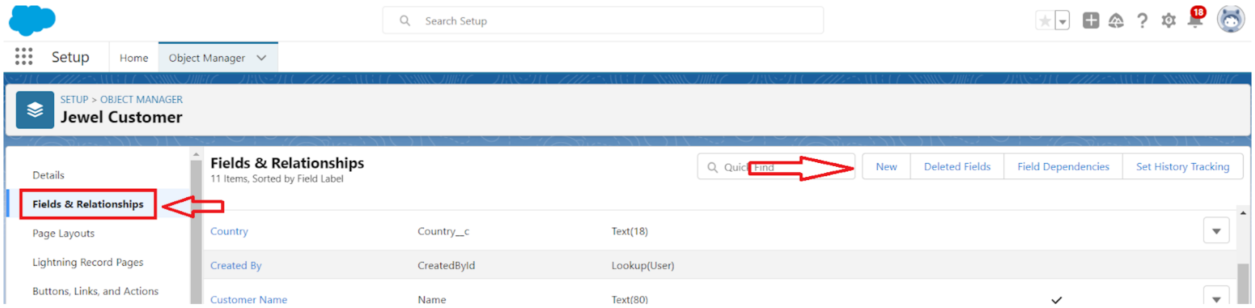
To Create a Master-Detail relationship :
1. Go to the setup page >> click on object manager >> type object name(Customer Order) in the quick find bar >> click on the object.
2.Click on fields & relationships >> click on New.
3.Select “Master-Detail relationship” as data type and click Next.
4.Select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



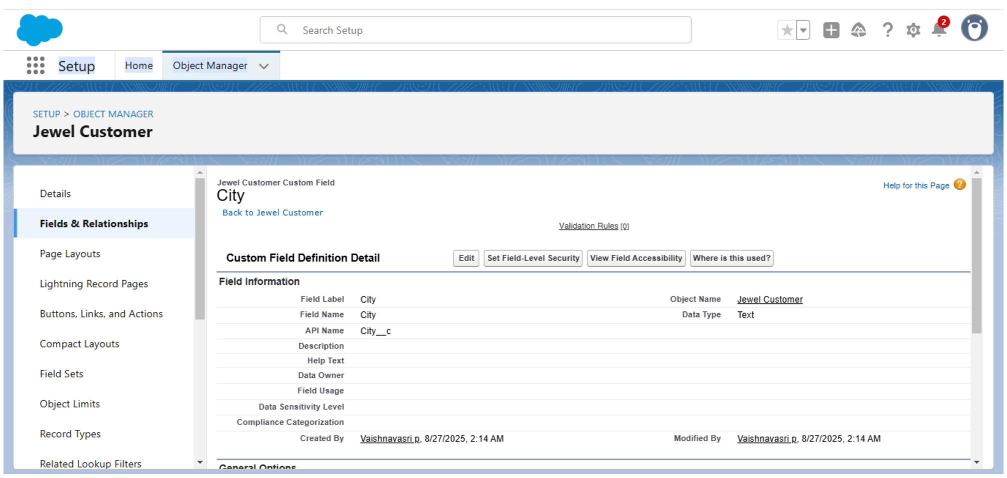
Creating Text Field in Jewel Customer Object

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.



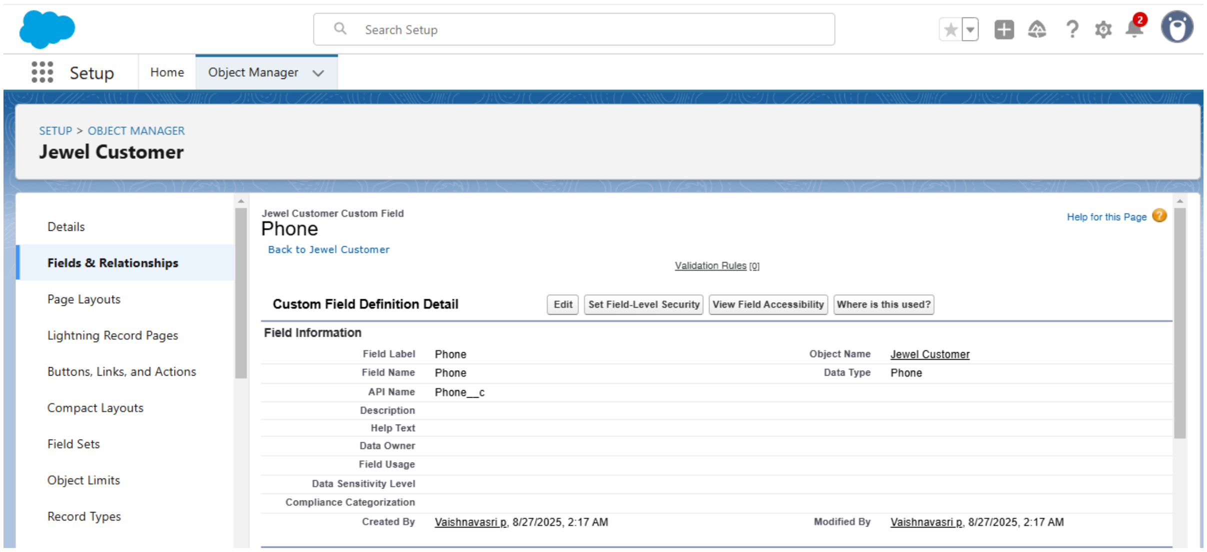
1. Select Data type as “Text”.
2. Click on Next
3. Fill the above as following:
4. Field Label: City
5. Length : 20
6. Field Name : gets auto generated
7. Click on Next >> Next >> Save and new.



Creating the Phone field in object Jewel Customer

To create fields in an object:

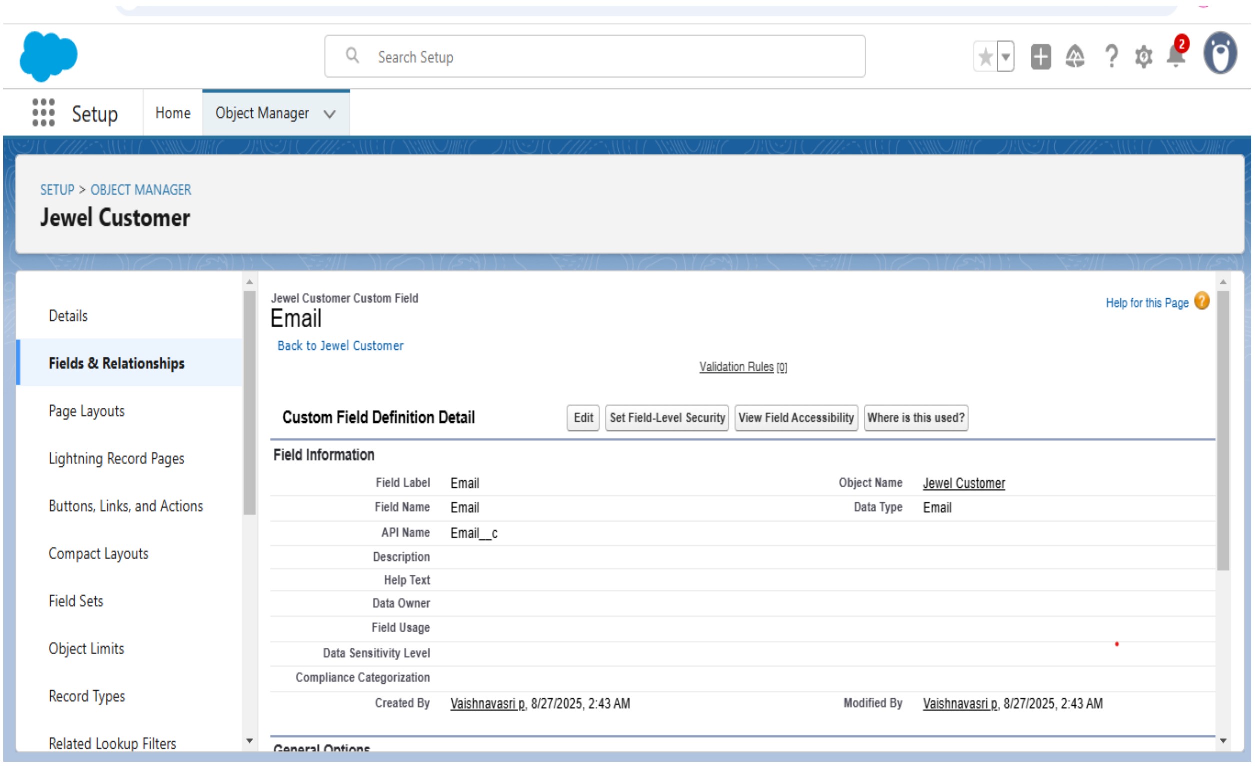
1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Phone” and click Next.
4. Given the Field Label as “ Phone”.
5. Field Name will be auto populated, and click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



Creating the Email field in object Jewel Customer

To create fields in an object:

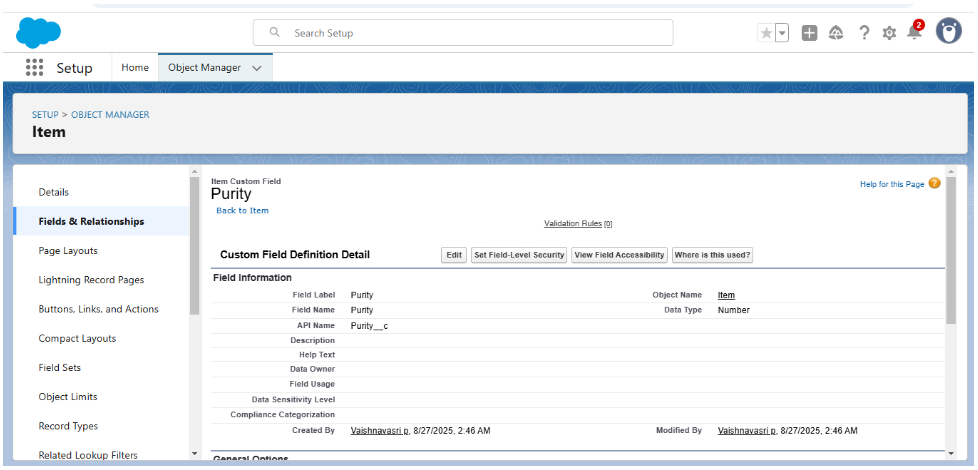
1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Email” and click Next.
4. Given the Field Label as “ Email”.
5. Field Name will be auto populated, and click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



Creating the number field in Item object

To create fields in an object:

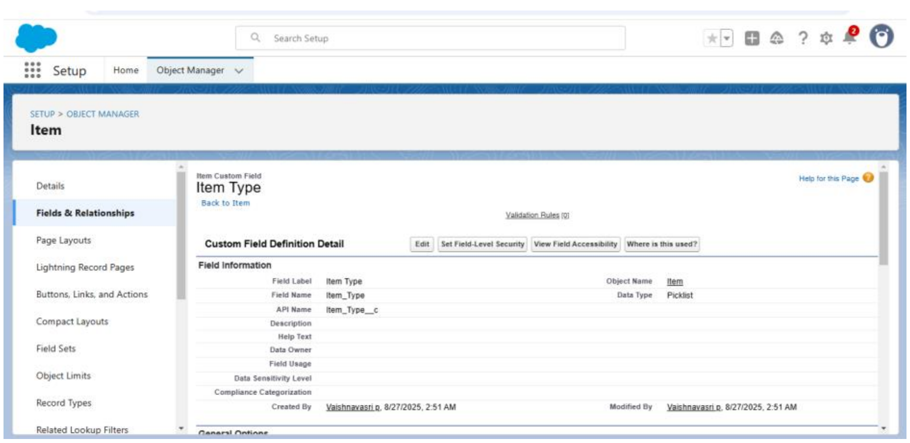
1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Number” and click Next.
4. Given the Field Label as “ Purity” and length as “ 2 ”.
5. Field Name will be auto populated,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



Creating Picklist Field in Item Object

To create fields in an object:

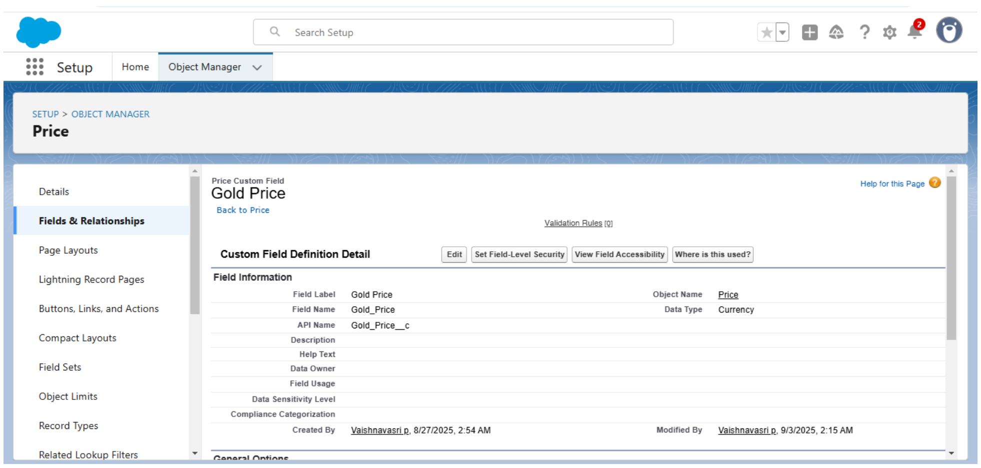
1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar>> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Picklist" and click Next.
4. Enter Field Label as "Item Type".
5. In values select "Enter values(Gold,Silver), with each 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 .

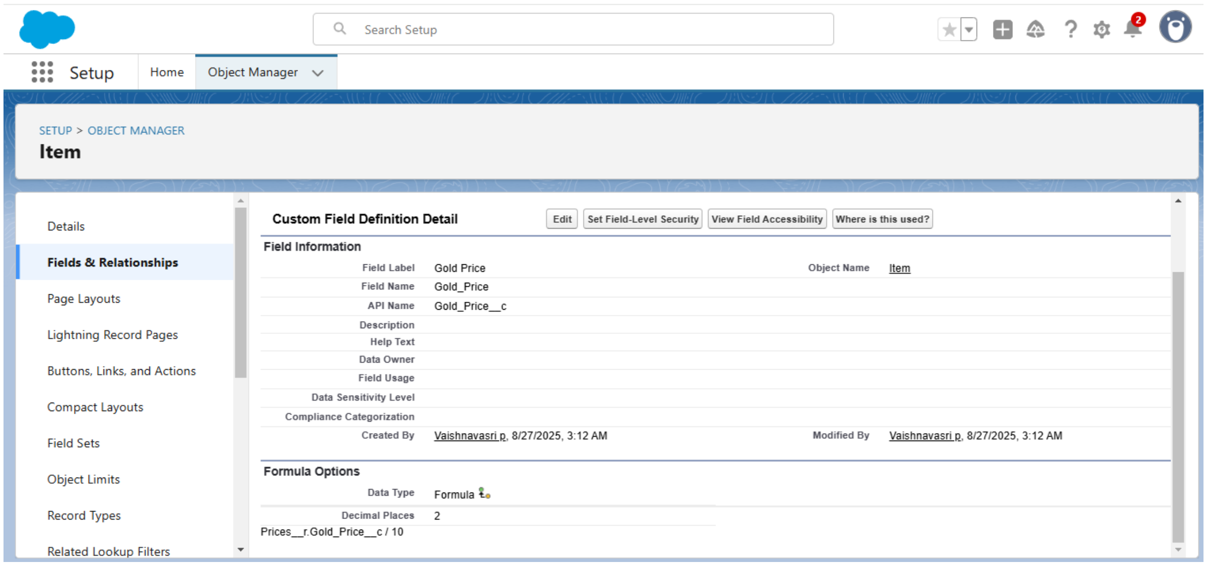


Creating Formula Field(Cross Object) in Item Object

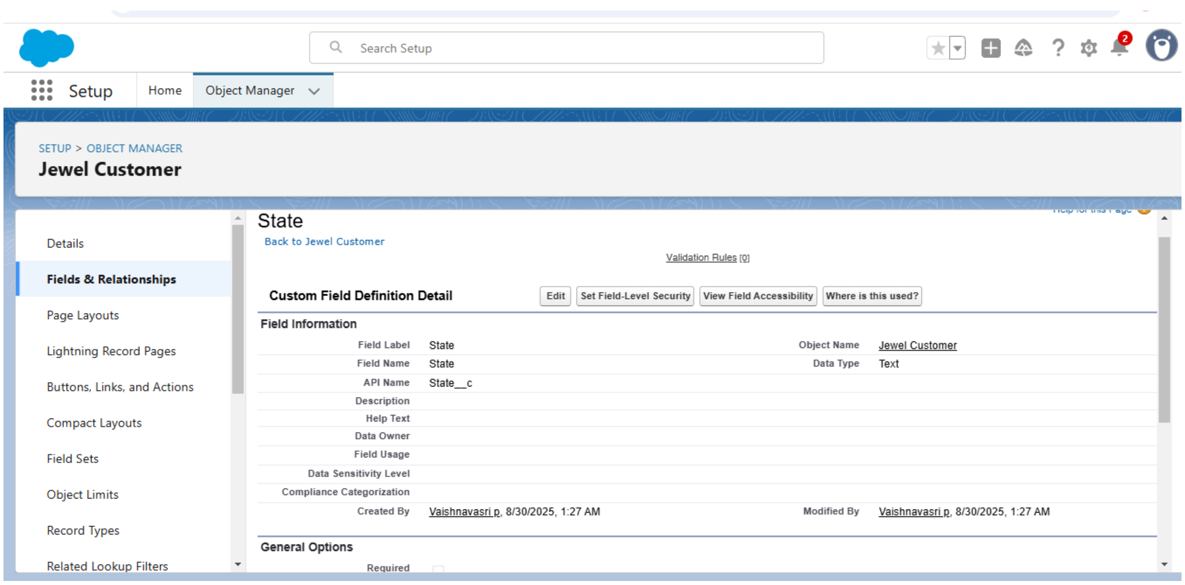
To create fields in an object:

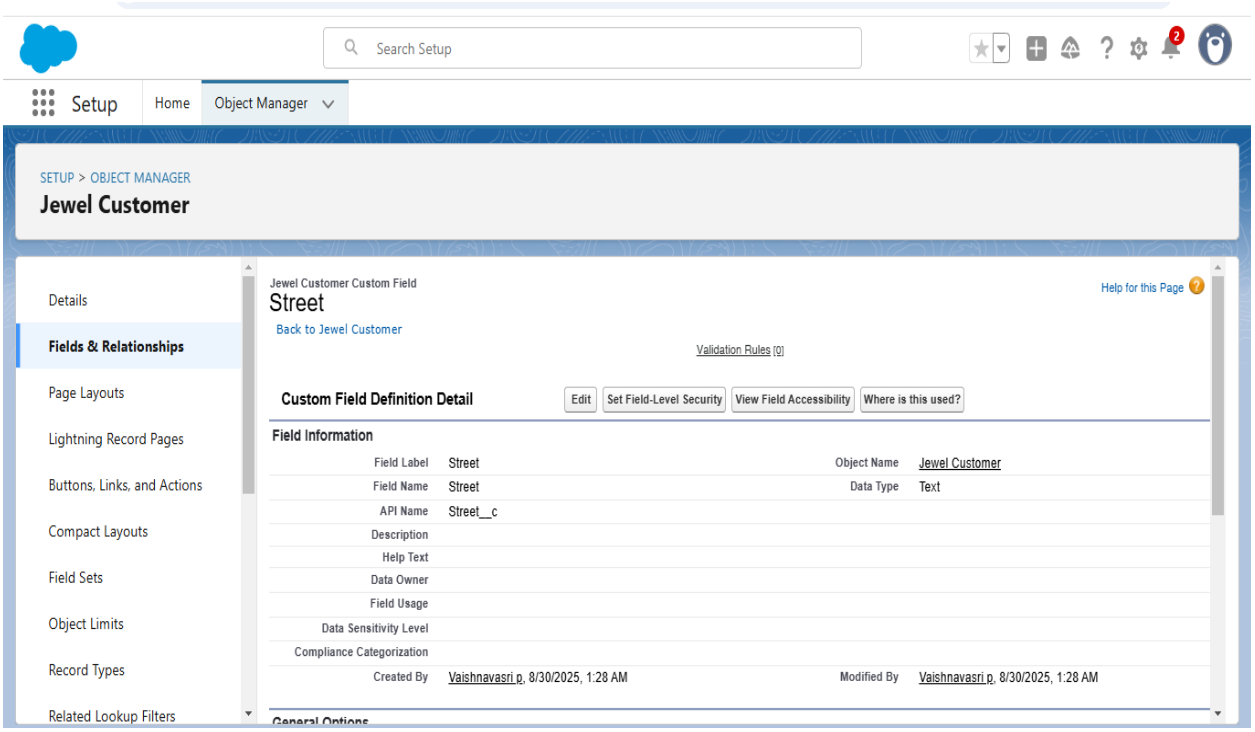
(Note:Create a Lookup Relationship in Item Object to Price Object with Field Name:Prices)

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.



Creating Remaining Fields in Objects

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Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
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Field Sets
Object Limits
Record Types
Related Lookup Filters
Jewel Customer Custom Field
Street
Back to Jewel Customer
Help for this Page
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Where is this used?
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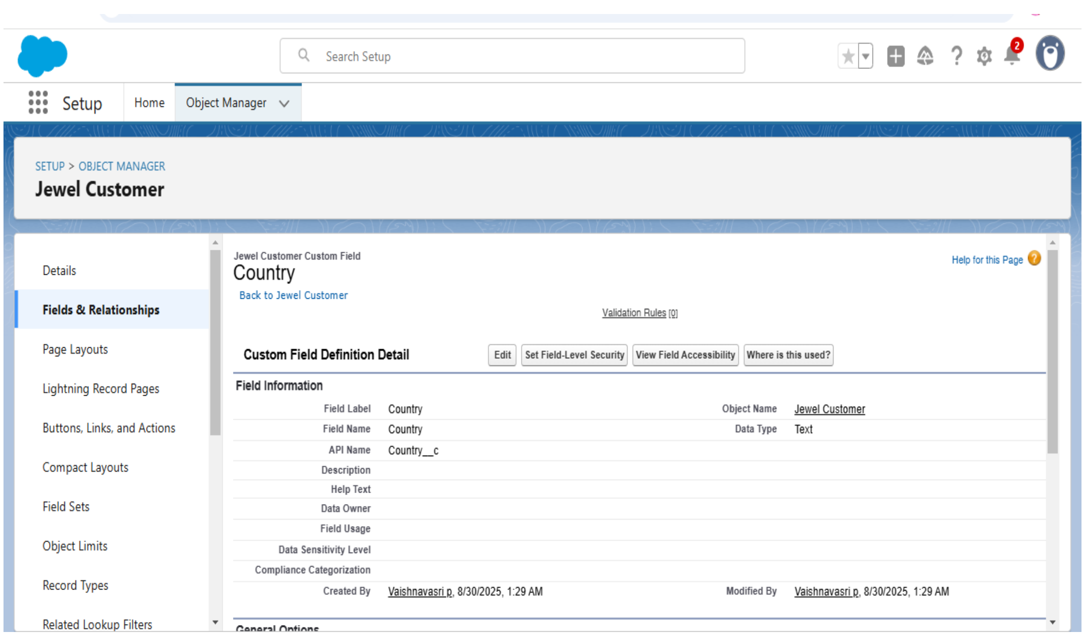
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Object Manager
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Jewel Customer
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Jewel Customer Custom Field
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Back to Jewel Customer
Help for this Page
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Where is this used?
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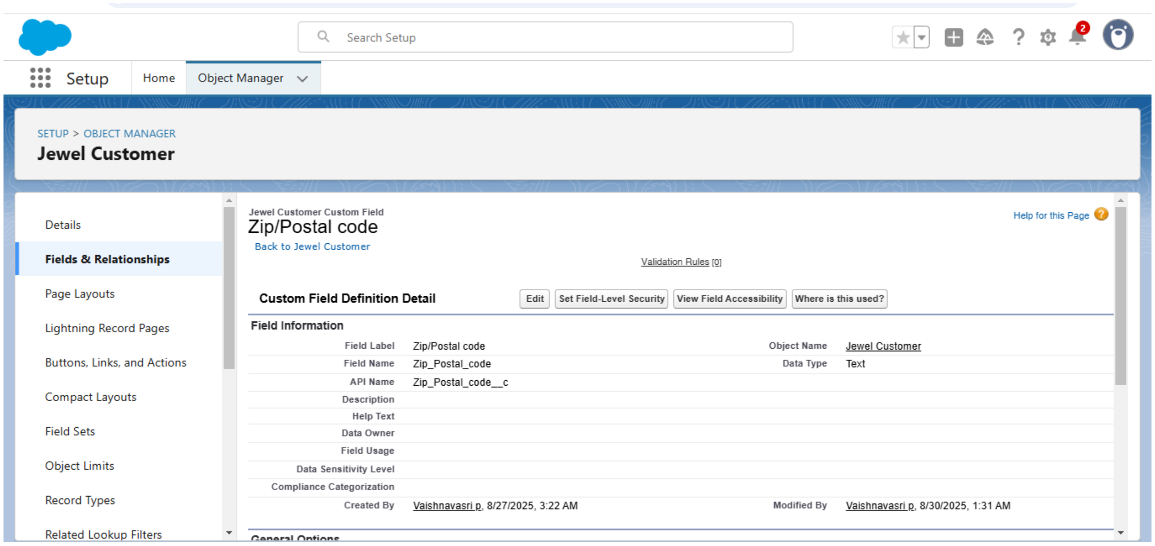
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Fields & Relationships
Page Layouts
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Buttons, Links, and Actions
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Field Sets
Object Limits
Record Types
Related Lookup Filters
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Back to Jewel Customer
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View Field Accessibility
Where is this used?
Field Information
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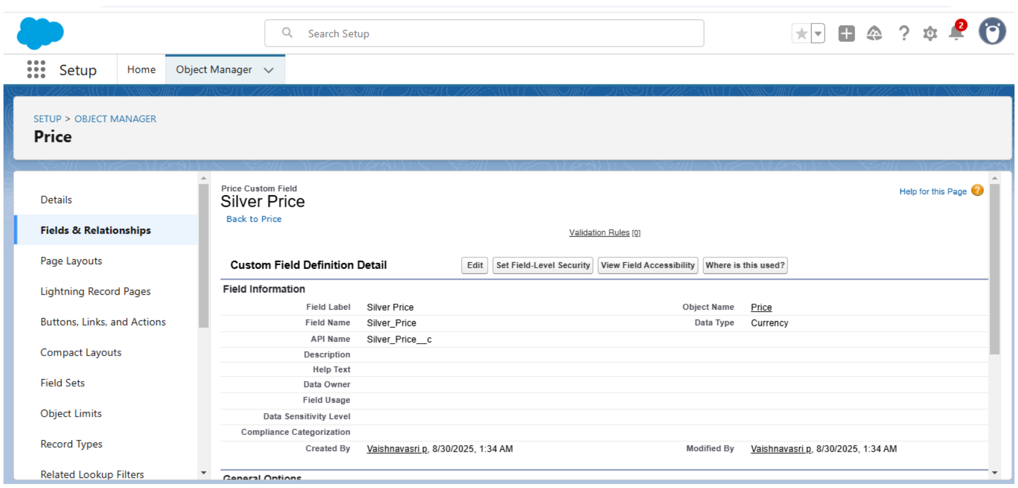
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Object Manager
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Price
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Fields & Relationships
Page Layouts
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Buttons, Links, and Actions
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Object Limits
Record Types
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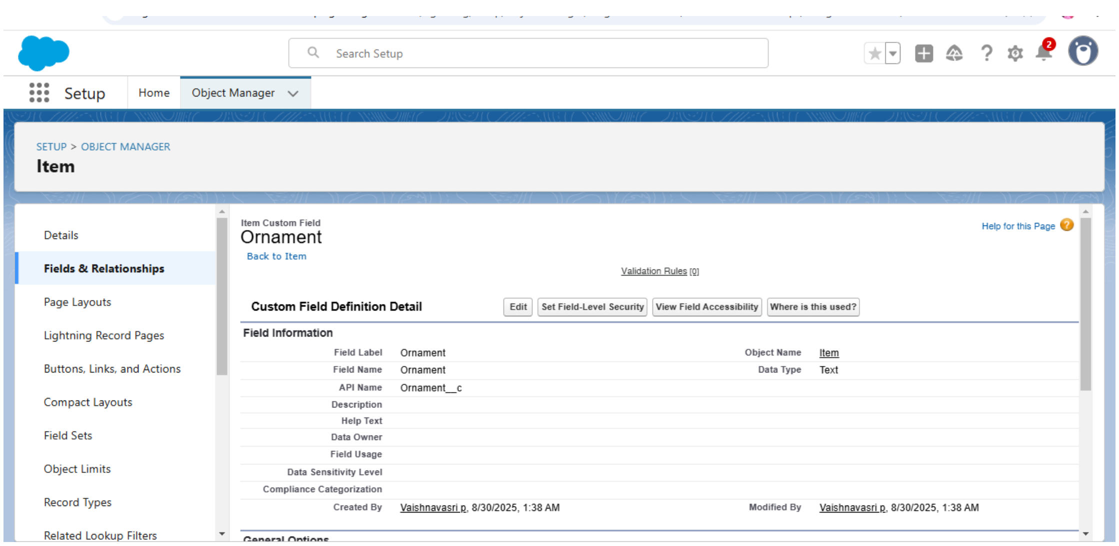
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Object Manager
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Item
Details
Fields & Relationships
Page Layouts
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Buttons, Links, and Actions
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Object Limits
Record Types
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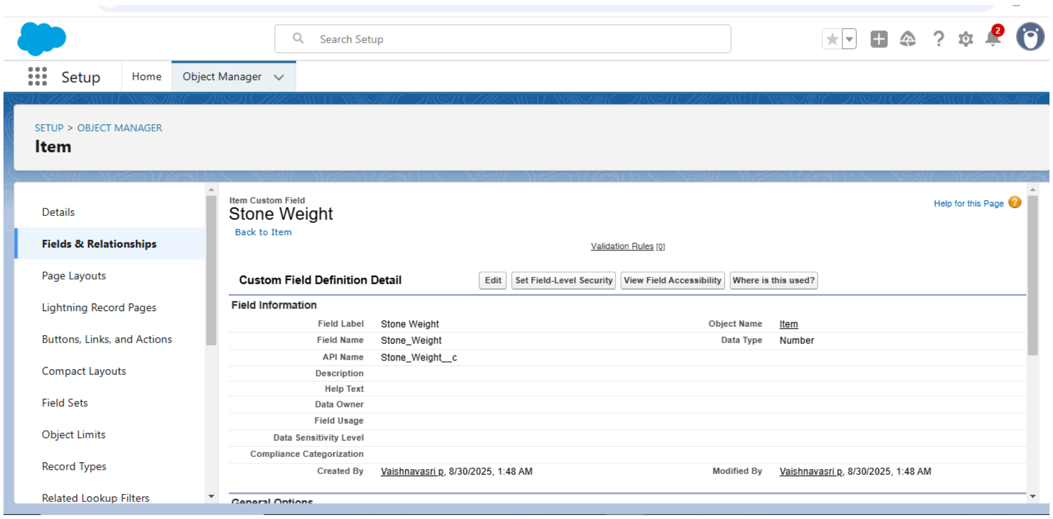

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Object Manager
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Fields & Relationships
Page Layouts
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Buttons, Links, and Actions
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Record Types
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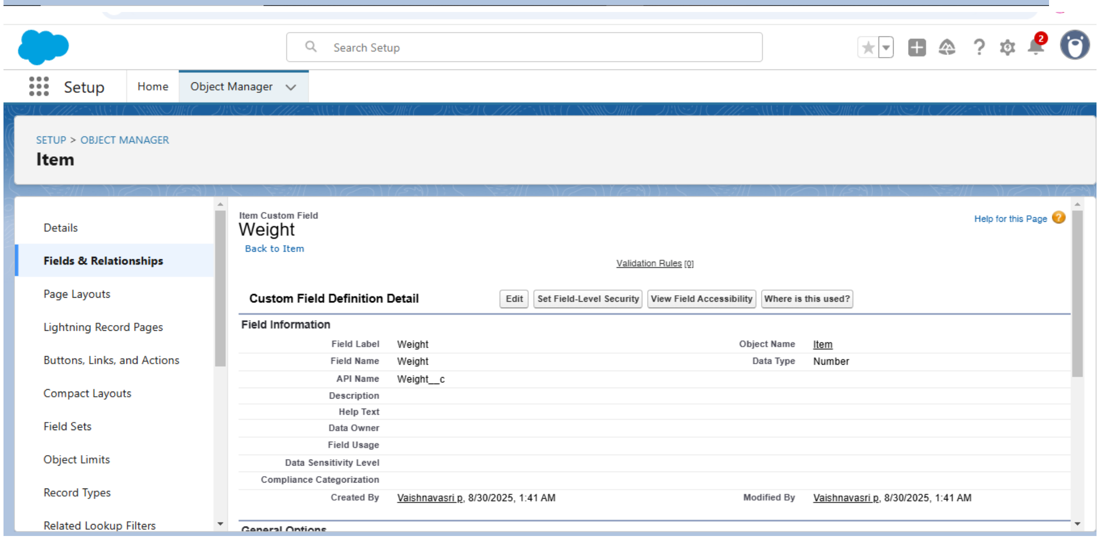

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Where is this used?
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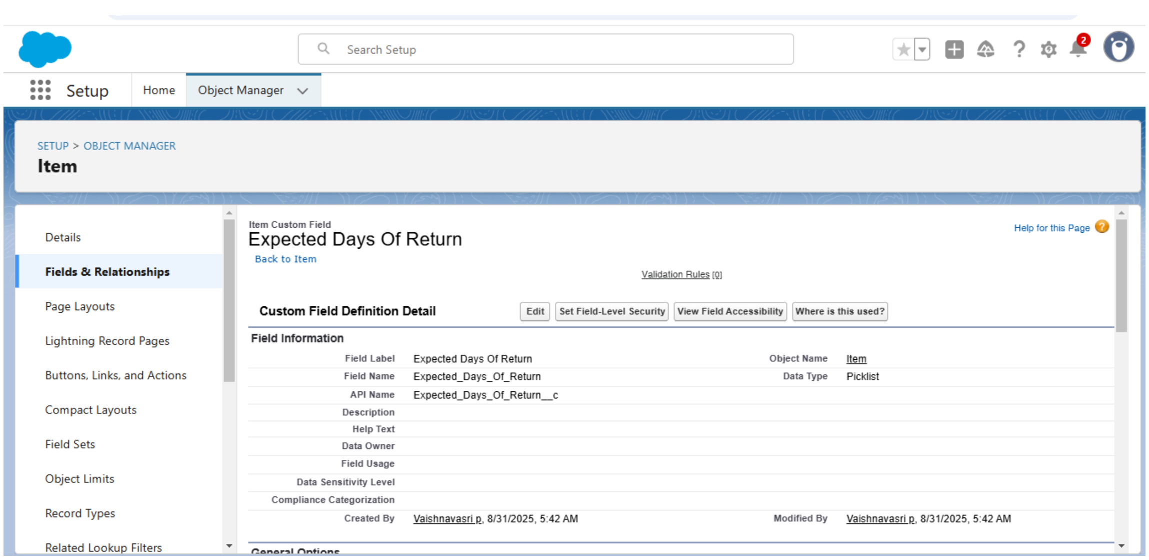

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Record Types
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Expected Days Of Return
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Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label Expected Days Of Return
Object Name Item
Field Name Expected_Days_Of_Return
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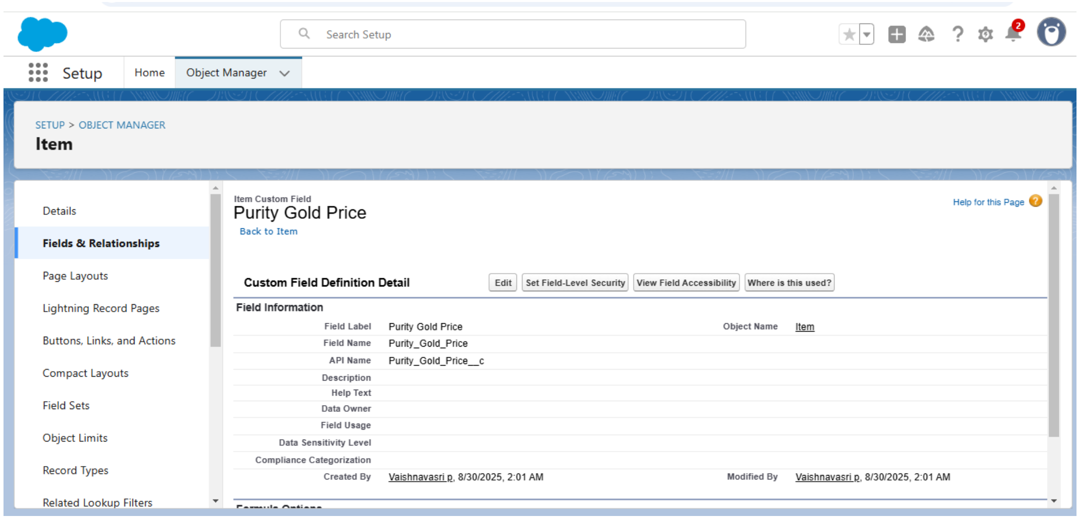
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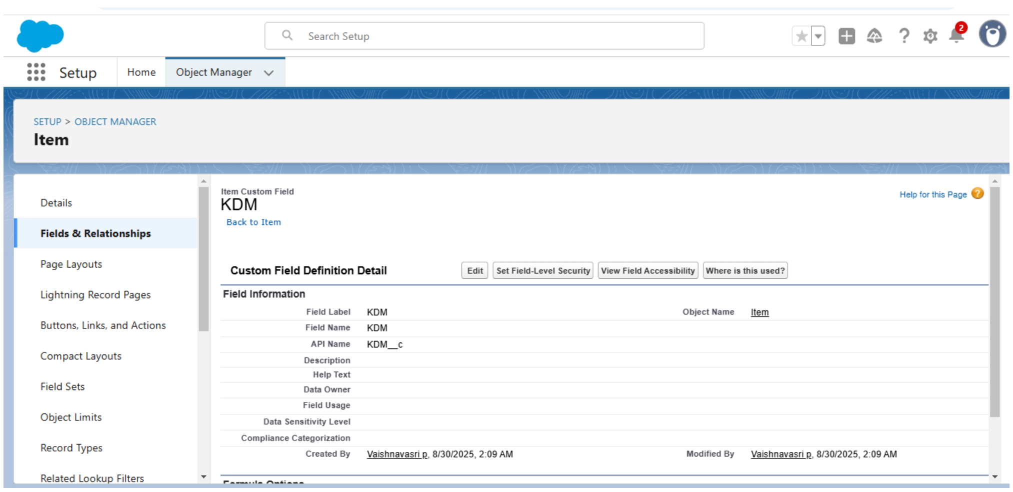
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Item
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Item Custom Field
Purity Gold Price
Back to Item
Help for this Page
Custom 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


Search Setup
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
KDM
Back to Item
Help for this Page
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
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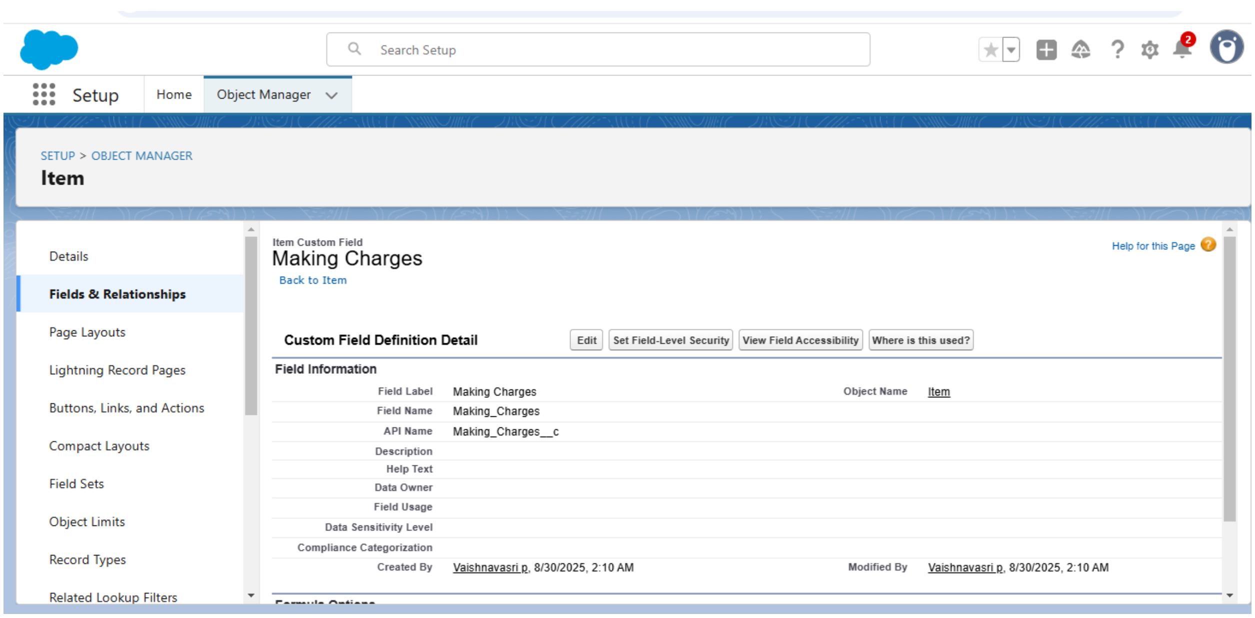
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Item
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Item Custom Field
Making Charges
Back to Item
Help for this Page
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
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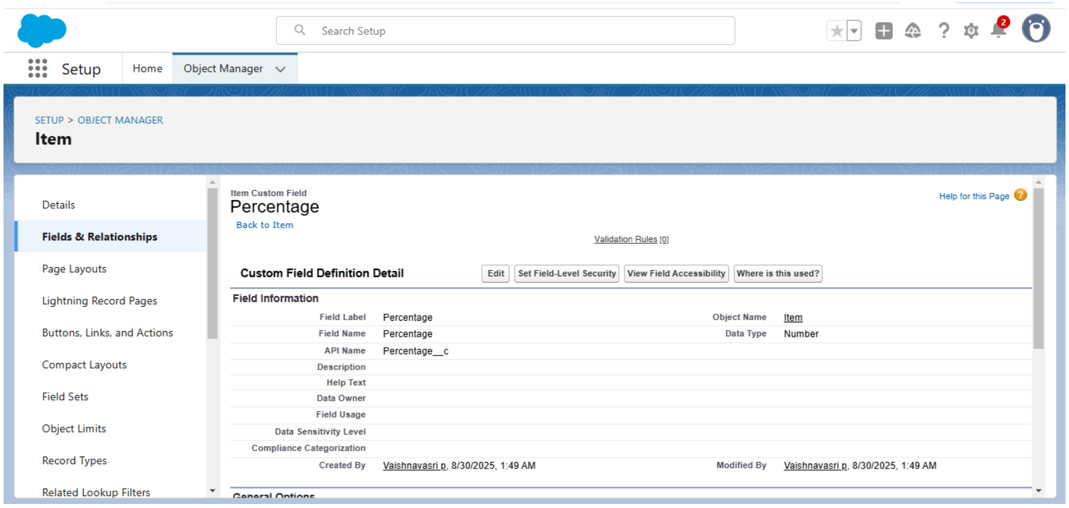
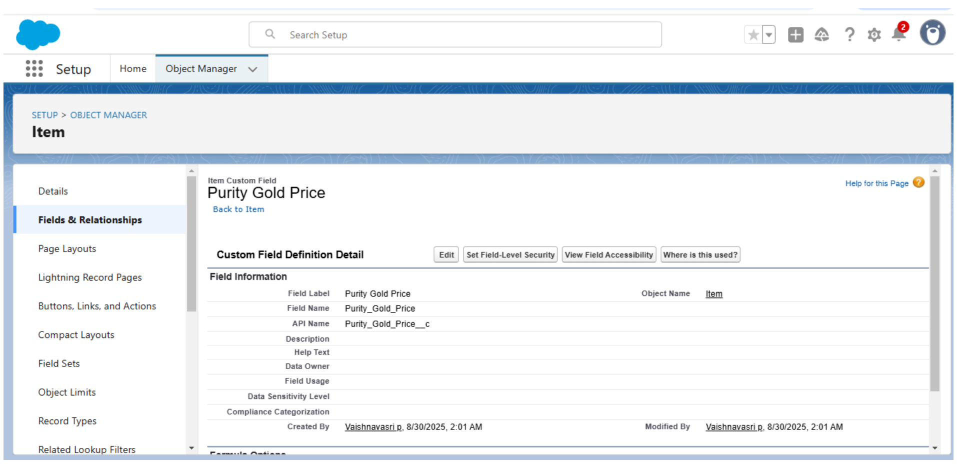
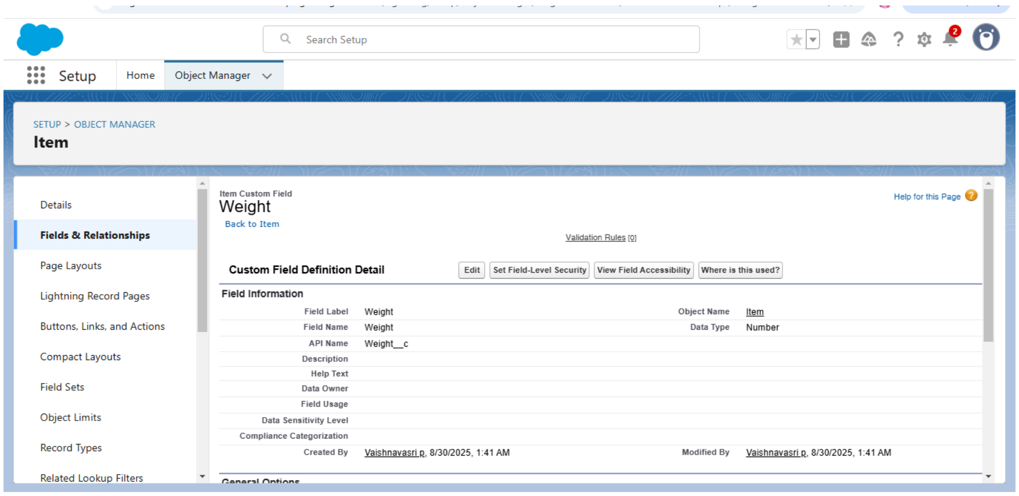
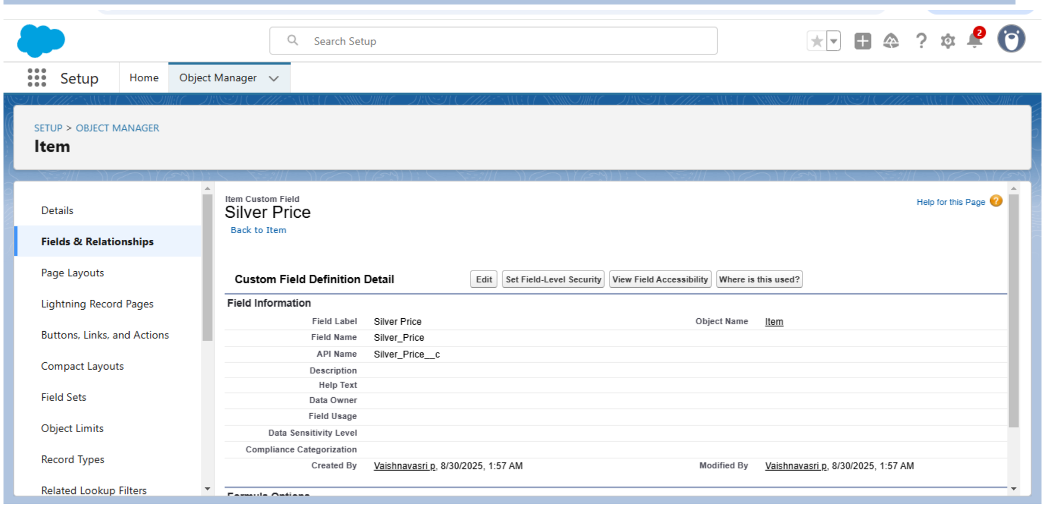
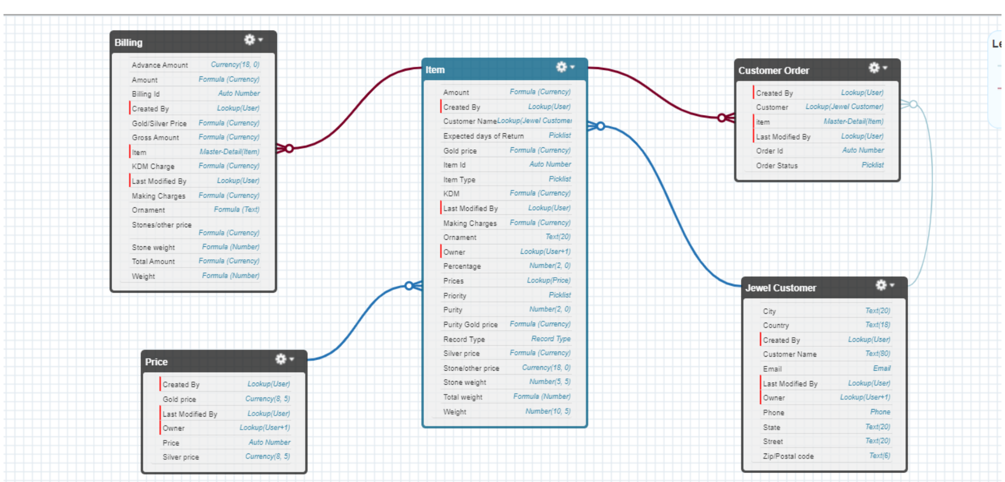

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Item
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Item Custom Field
Percentage
Back to Item
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
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


Search Setup
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
Purity Gold Price
Back to Item
Help for this Page
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



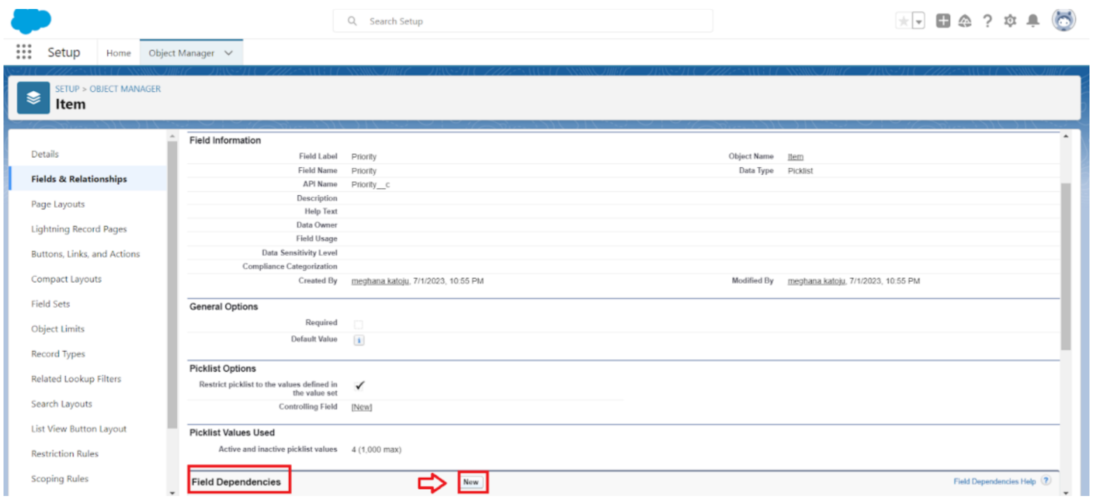


Schema Builder

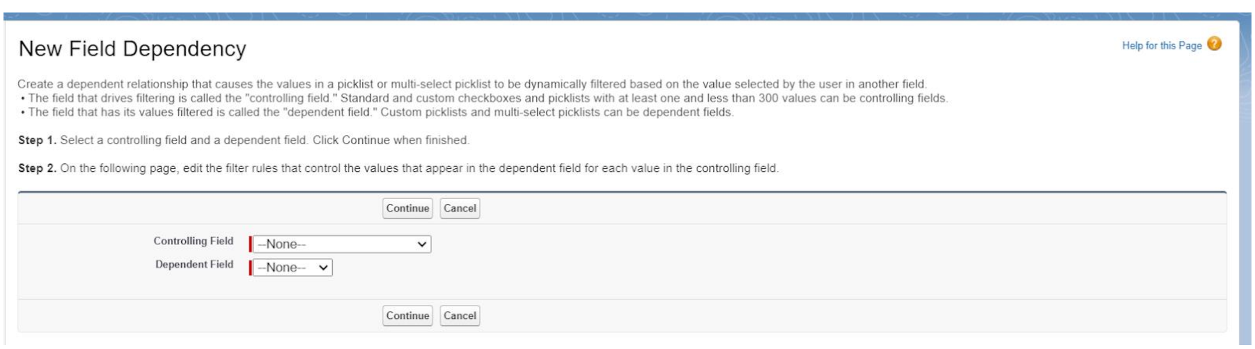


Creating the Field Dependencies

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.



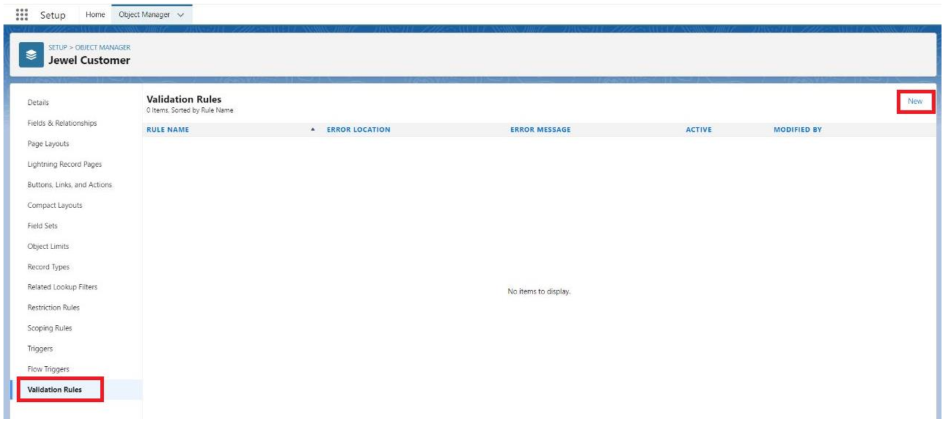
5.Select the “Expected Days of Return” values of related Priority values and Click on Include Values >> Save.

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.

2. Click on the validation rule >> click New.



3. Enter the Rule name as “Postal Code “.
4. Insert the Error Condition Formula as : -

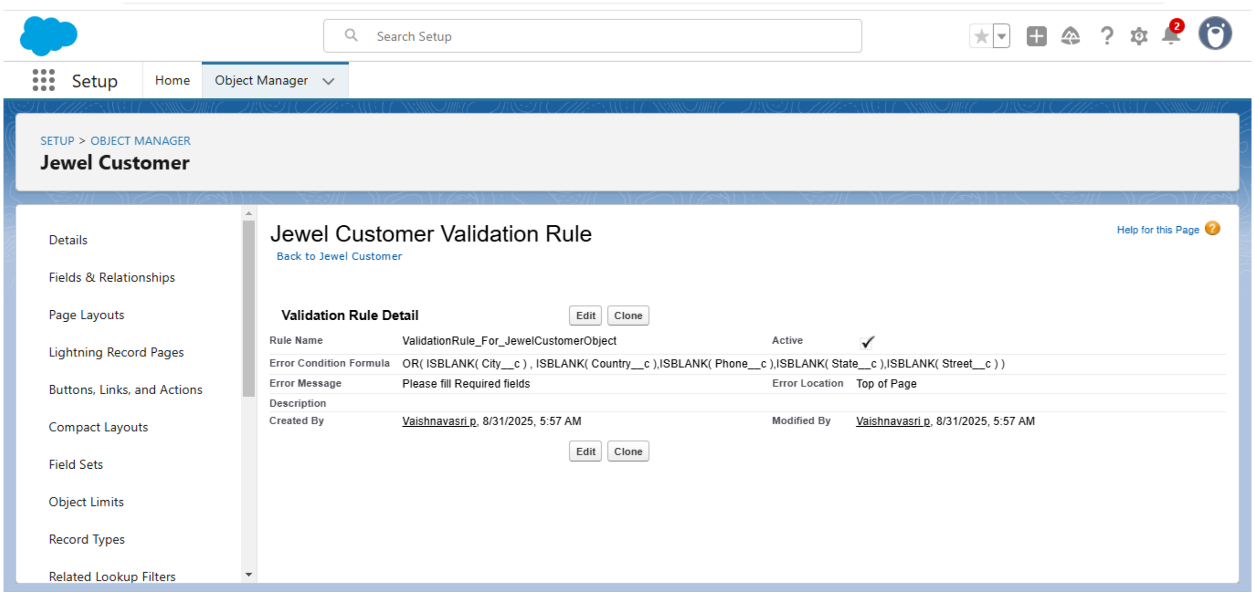
```
AND(
  OR(
    LEN( Zip_Postal_code__c ) <> 6, NOT(REGEX(Zip_Postal_code__c, "^[0-9]{6}$"))),
    NOT(ISBLANK(Zip_Postal_code__c))
  )
)
```

5.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:

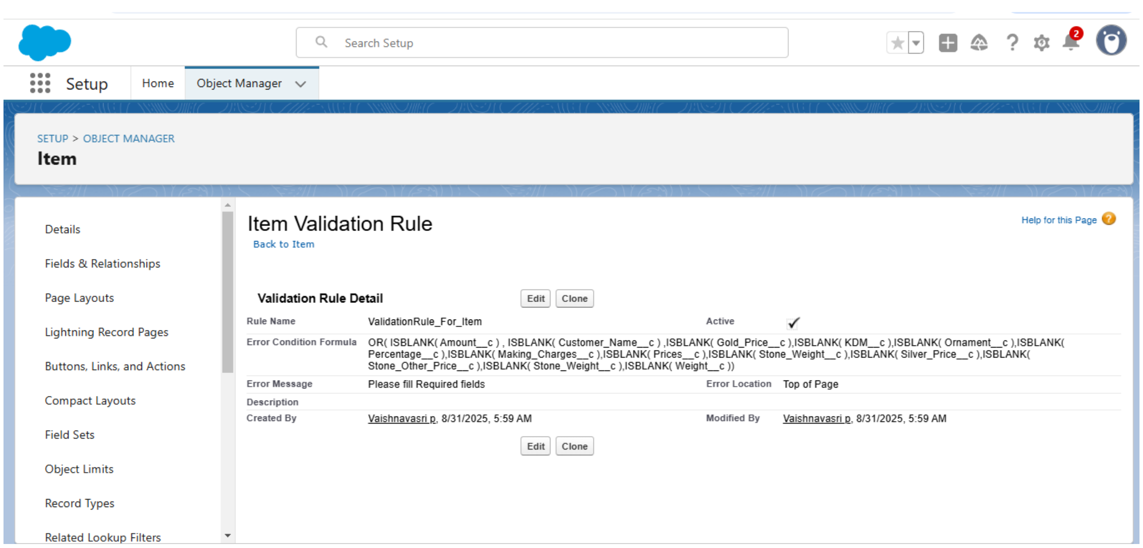
Create One more Validation rule for Jewel Customer object.

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



Activity 2:

1. Enter Rule name as “ValidationRule For Item“.
2. Insert the Error Condition Formula as : -
   OR(ISBLANK(Amount__c) , ISBLANK(Customer_Name__c) ,ISBLANK(Gold_price__c),ISBLANK(KDM__c),ISBLANK(Ornament__c),ISBLANK(Percentage__c),ISBLANK(Making_Charges__c), ISBLANK(Prices__c),ISBLANK(Stone_weight__c),ISBLANK(Silver_price__c),ISBLANK(Stone_other_price__c),ISBLANK(Stone_weight__c),ISBLANK(Weight__c))
3. Enter the Error Message as “Please fill Required fields”, select the Error location as Top of Page and click Save.

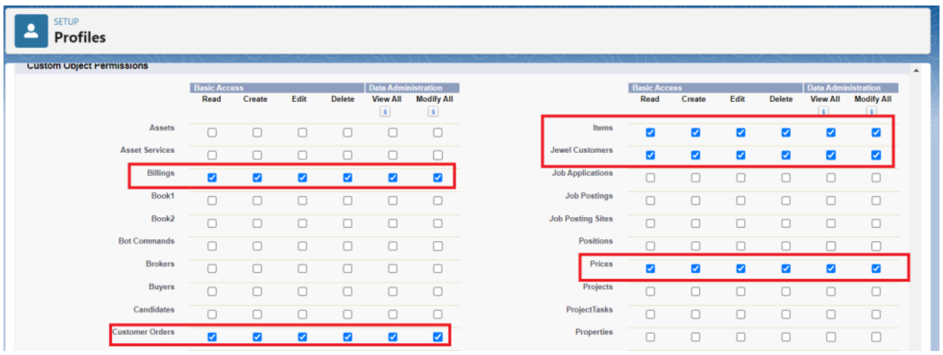


Milestone 6: Profiles

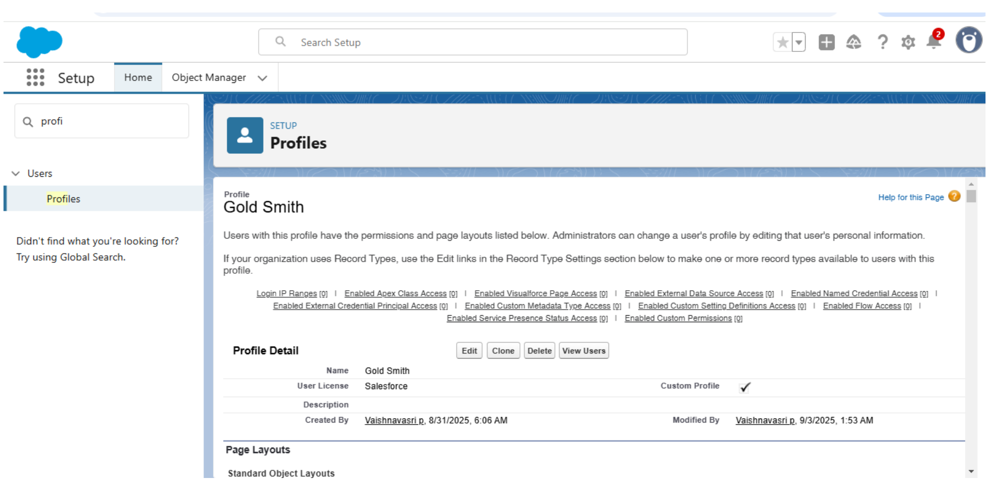
Gold Smith Profile

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 .

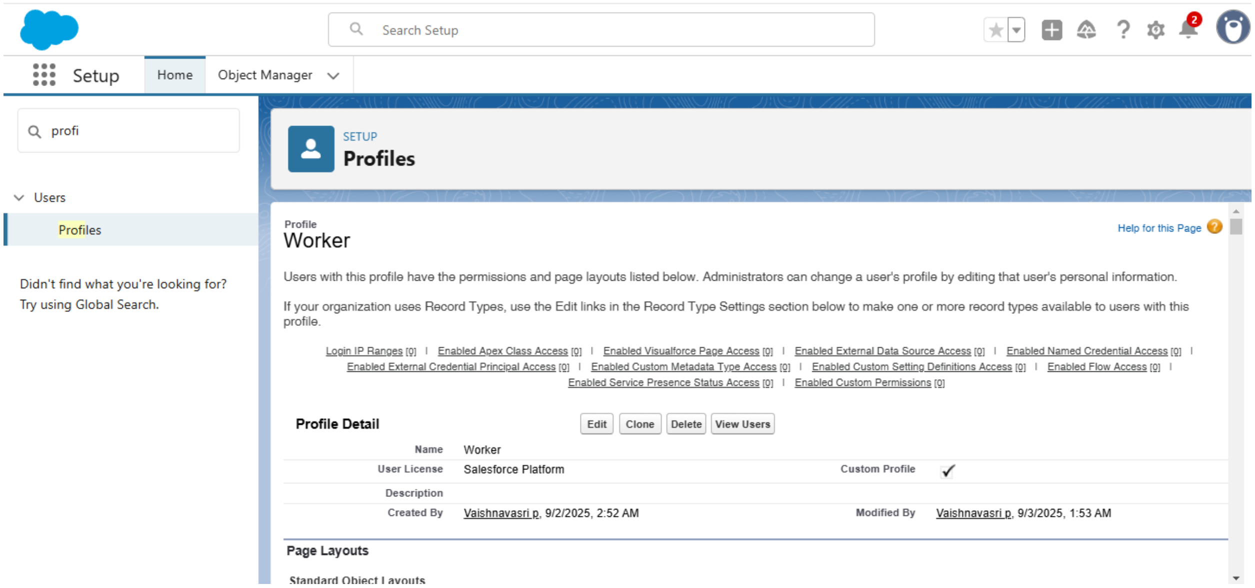


4.Scroll down and Click on Save.



Worker Profile

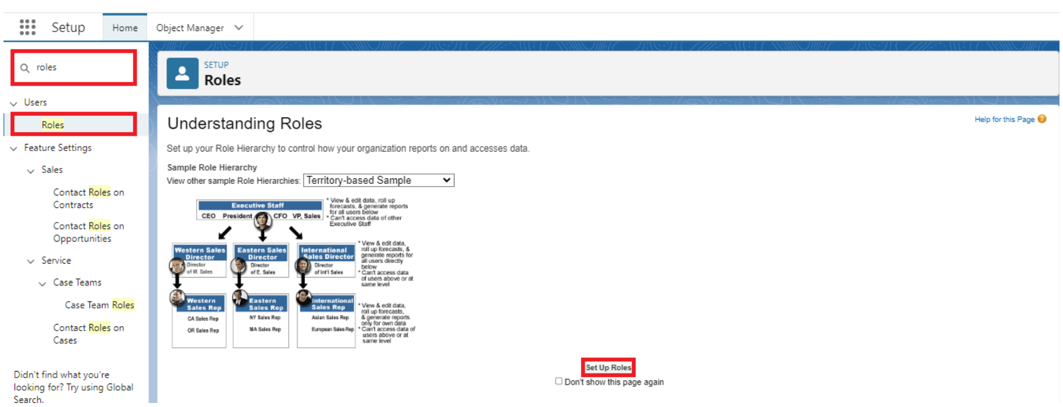
1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Salesforce Platform User) >> enter profile name () >> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Items,Price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



Milestone 7: Roles

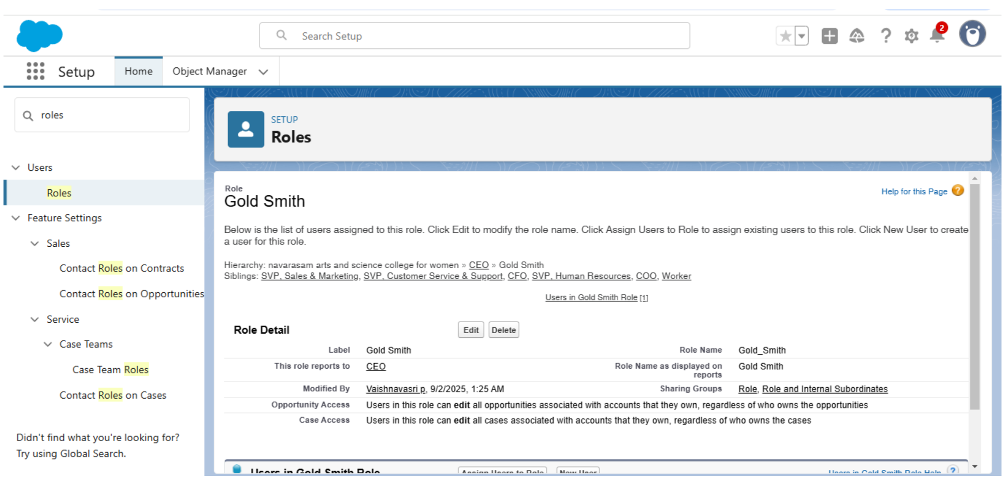
Creating Gold Smith Role

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

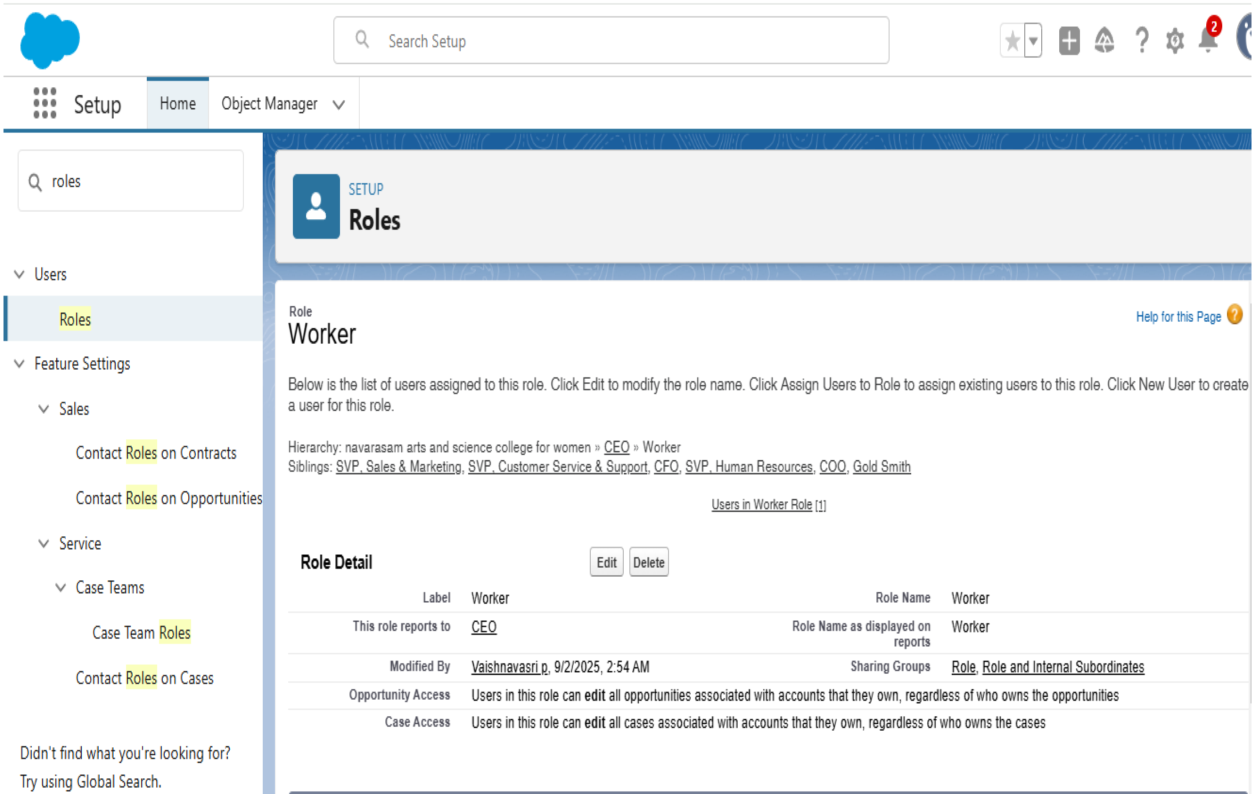


2. Click on Expand All and click on add role under whom this role works.

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



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



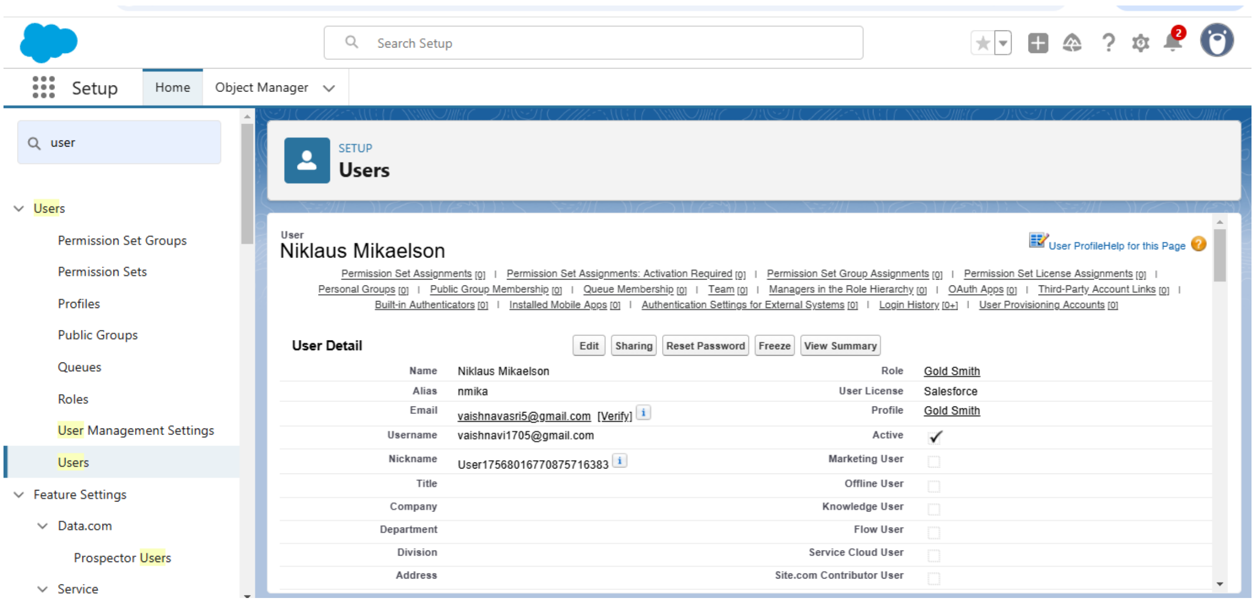
Milestone 8: Users

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

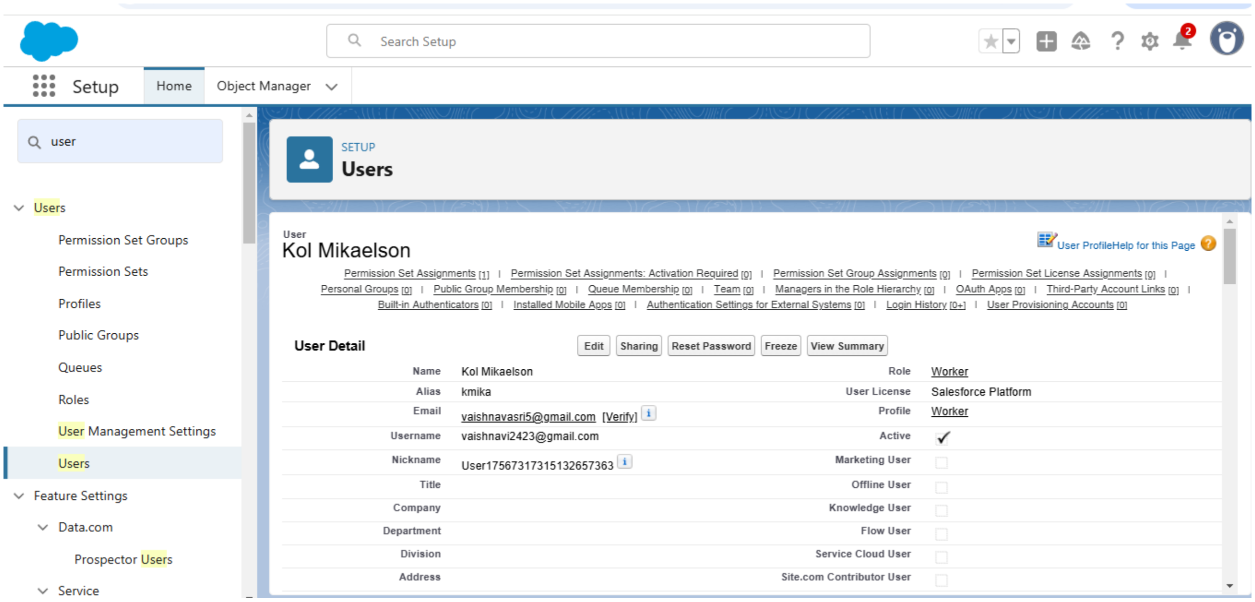


Activity 2:

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

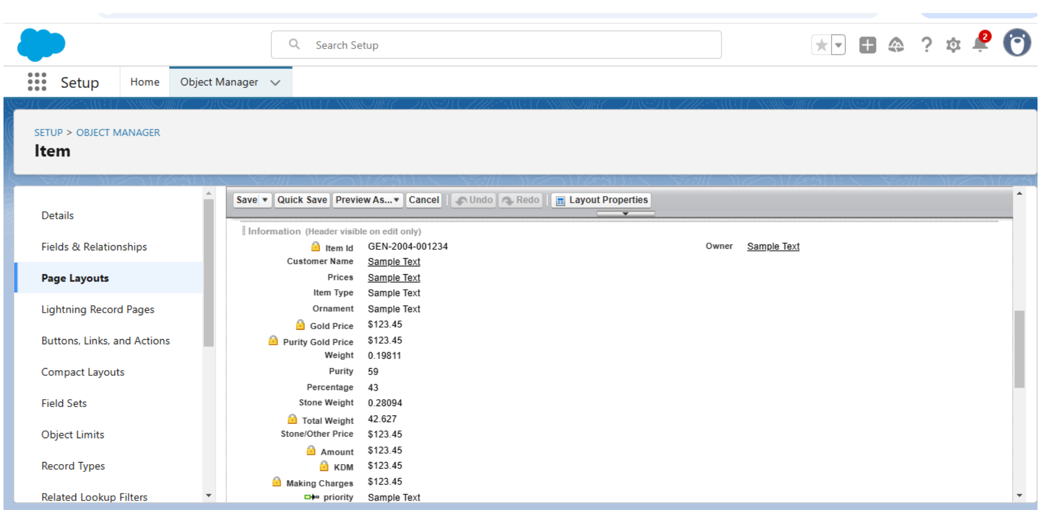
3. Save.



Milestone 9: Page layouts

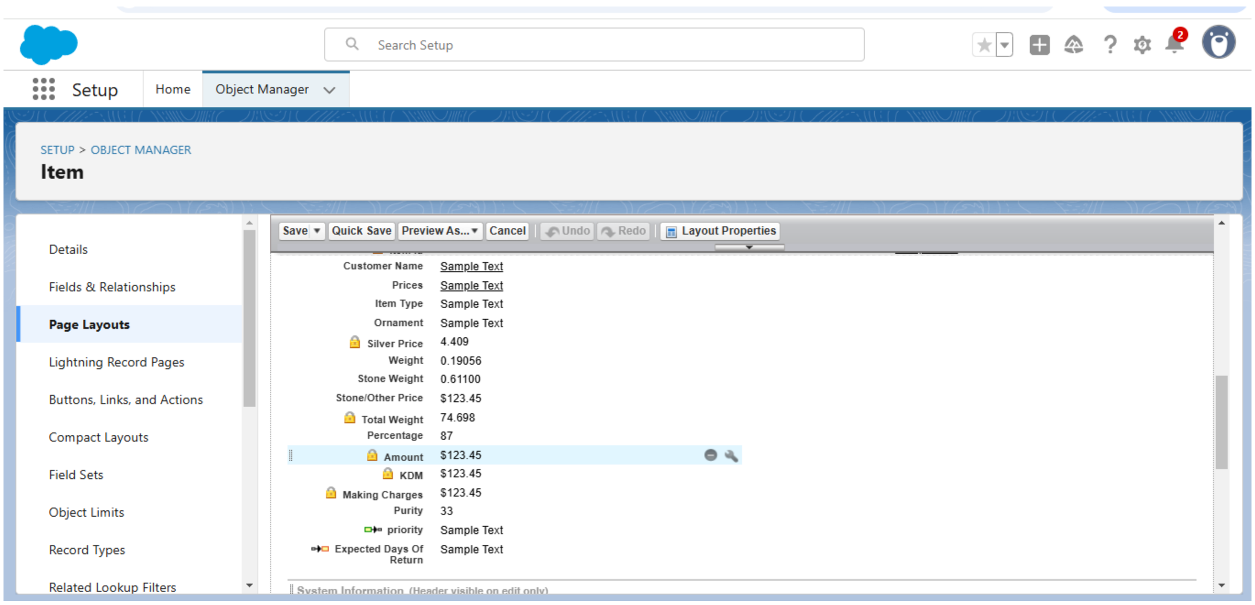
To Create a Gold Page layout

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

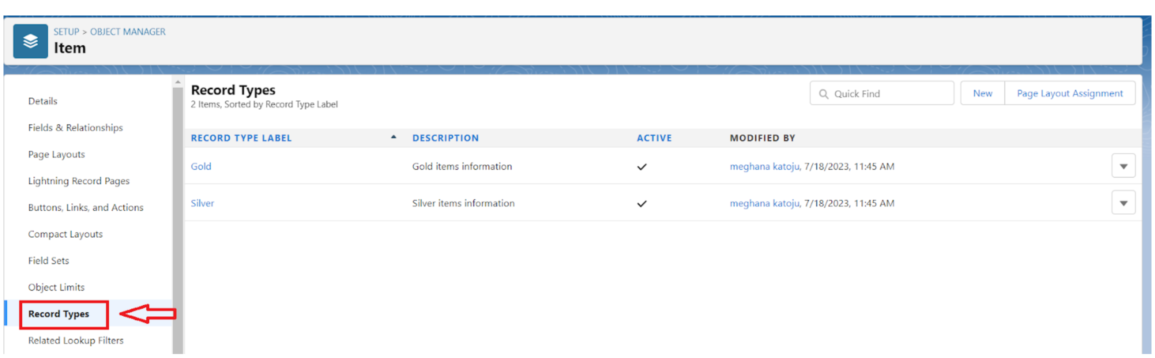
1. Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.
2. Click on Page layout >> Click on New.
3. Give Page layout Name as “Page Layout for Silver” and click on Save.
4. Arrange the field as shown in the Information Section ,remove fields which are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



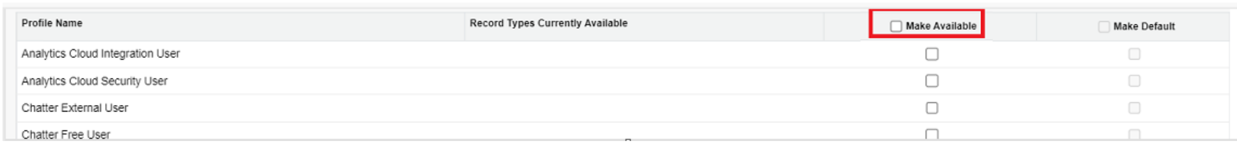
Milestone 10: Record Types

To create a Record Type

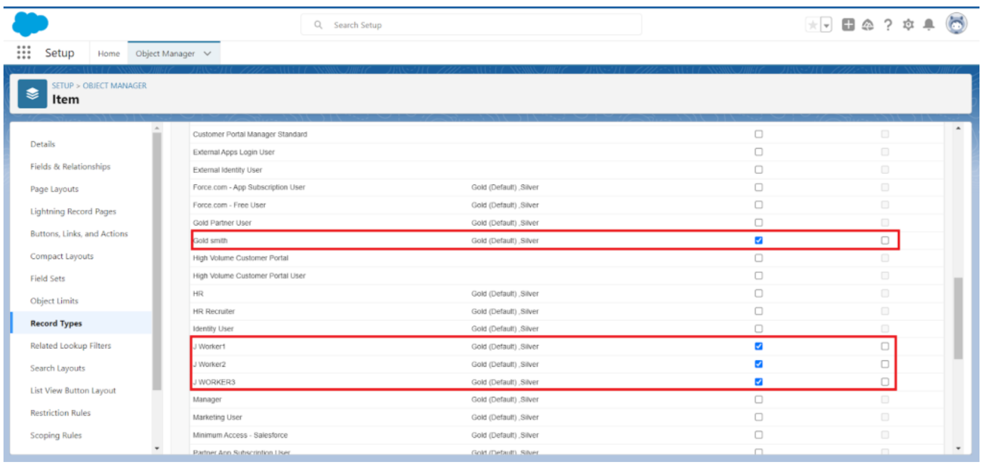
1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
2. Click on the Record Types >> click New.



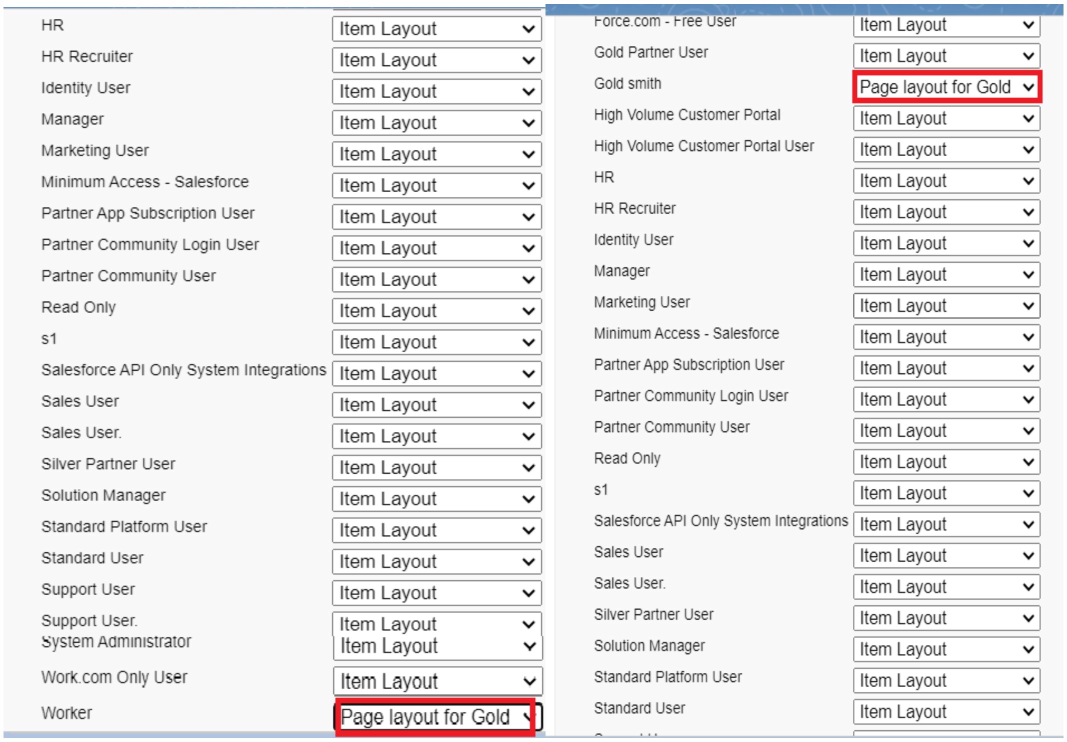
3. Select Existing Record as “Master”,Record type Label as “Gold”,Description as “Gold items information”.
4. Uncheck for “Make Available”.



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



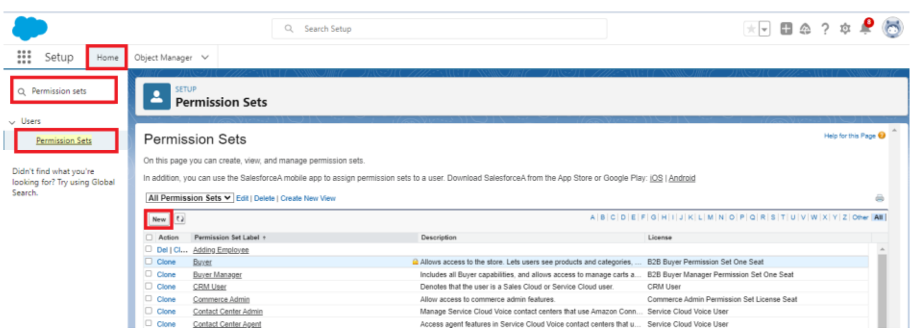
6.Select “Apply a different layout for each profile”, and change page layout to “Page Layout for Gold“for Gold Smith,Worker and System Administrator ? save & new.



Milestone 11: Permission sets

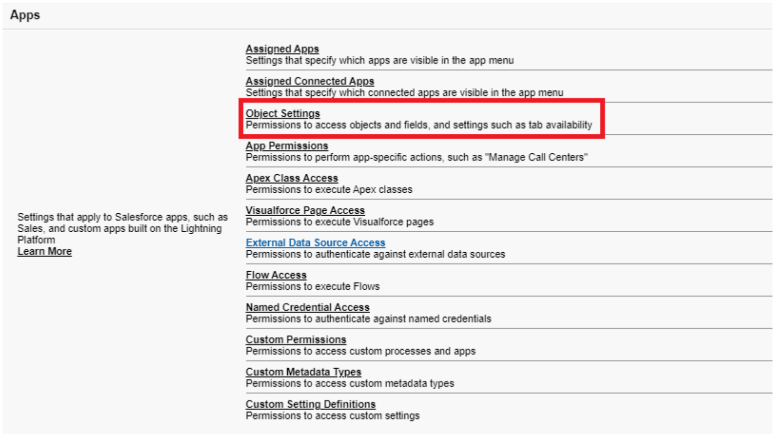
Creating permission set

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

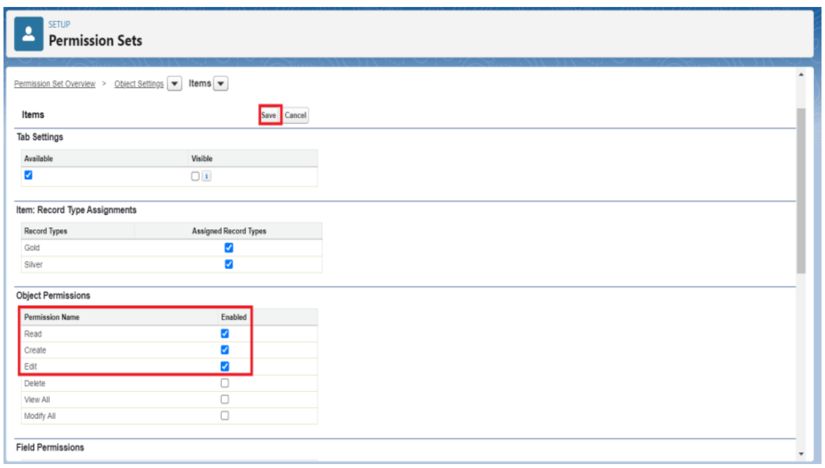


2.Enter the label name as “Per to Worker”, API will be auto populated ? Save.

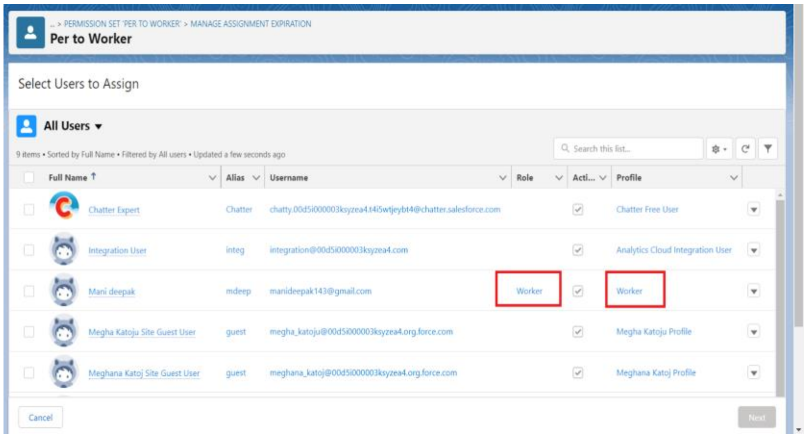
3.Under Apps Select object settings.



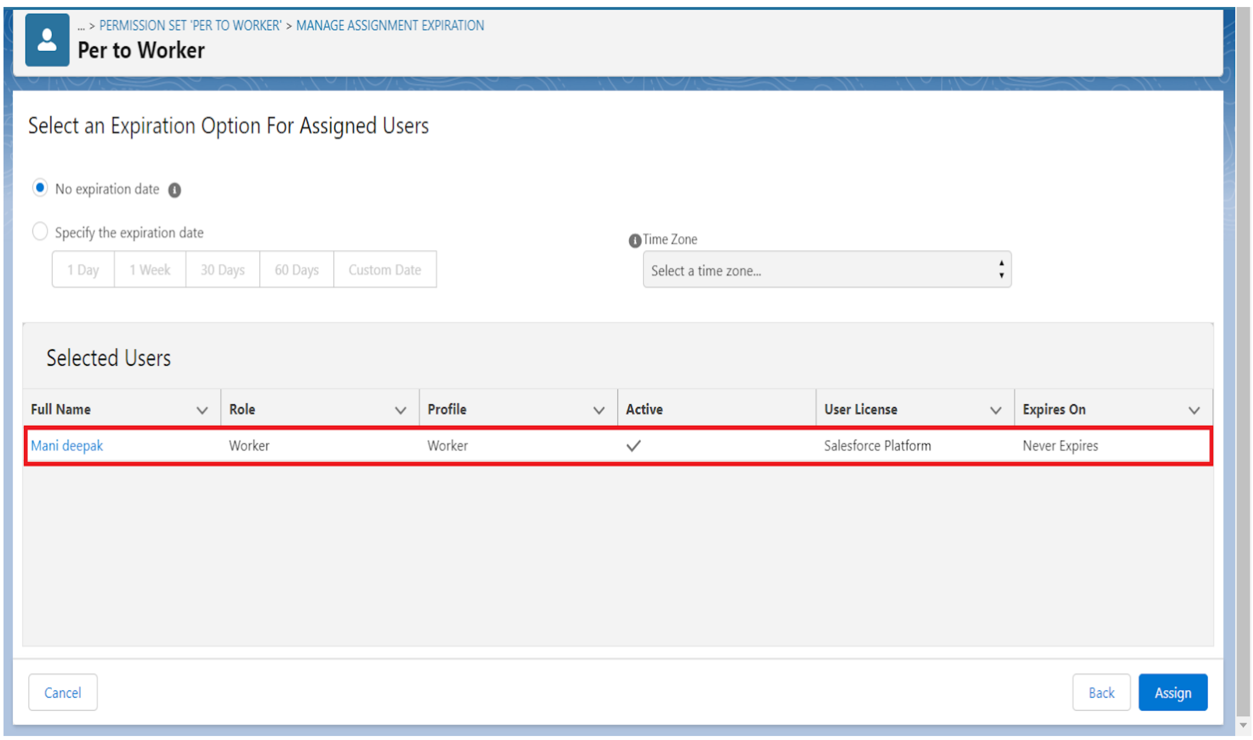
4. Click on Items object ? click on Edit ? under Item:Record Type Assignments,enable Gold,Silver ? Object permission check for read ,edit and create.



5. Click on Save.
6. After saving the permission click on the Manage assignment
7. Now click on the Add Assignment.



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



Milestone 12: Trigger

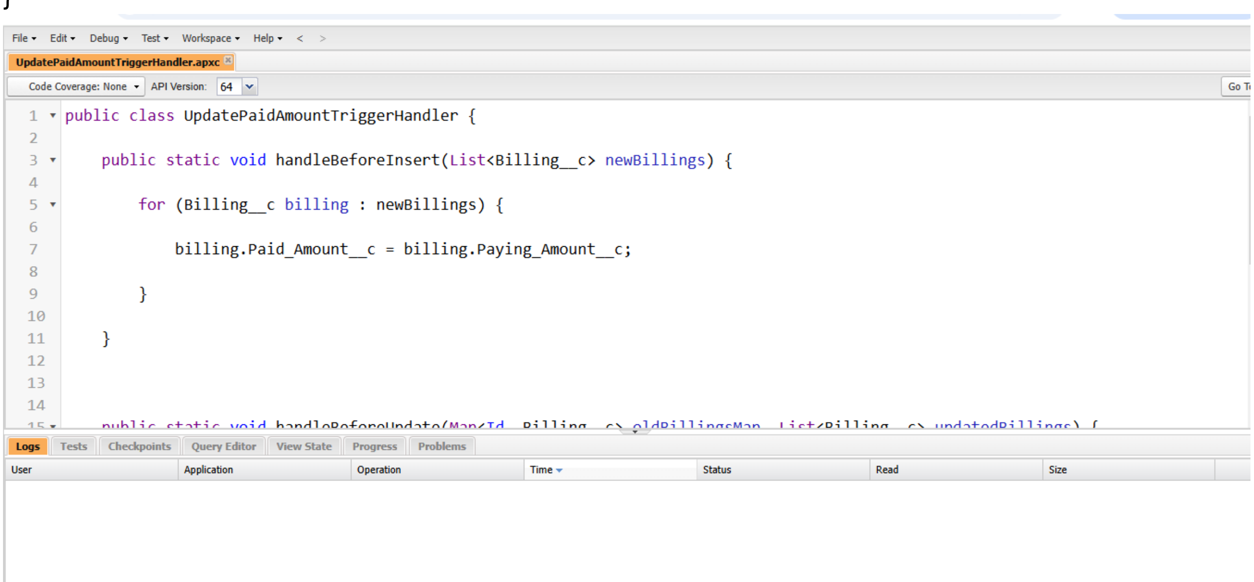
Create a Trigger Handler class

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;
        }
    }
}
```

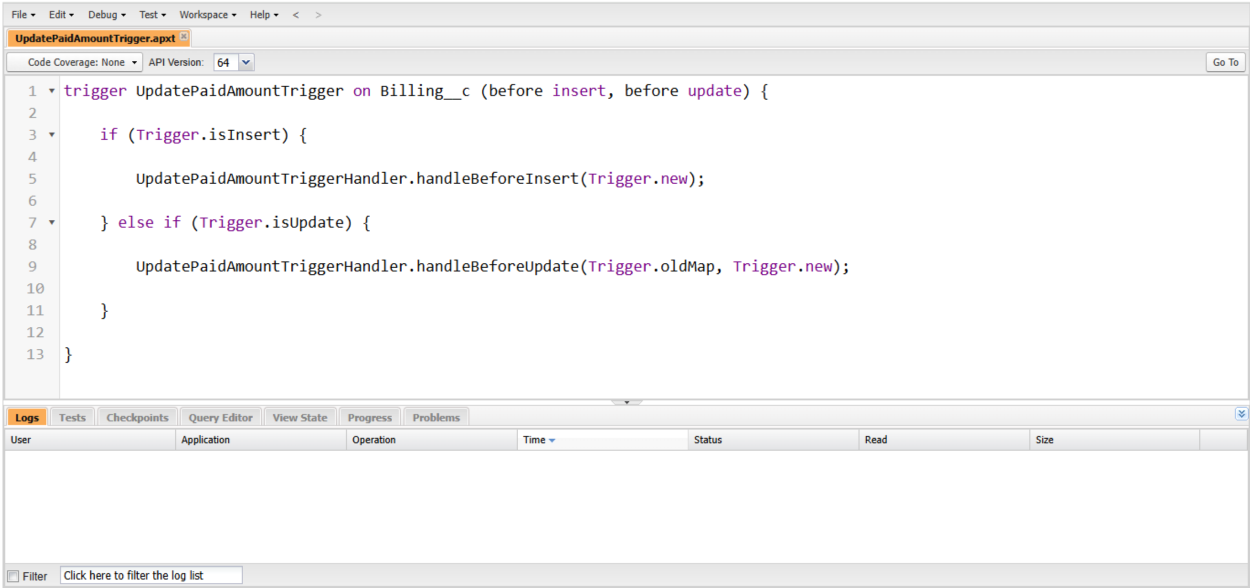


Create the trigger

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);
```

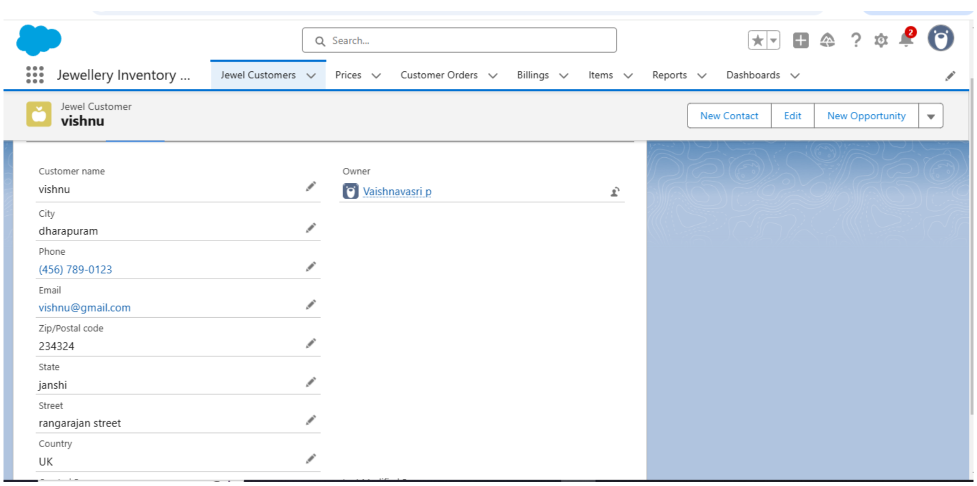
```
    }
}
```



Milestone 13: User Adoption

Create a Record (Jewel Customer)

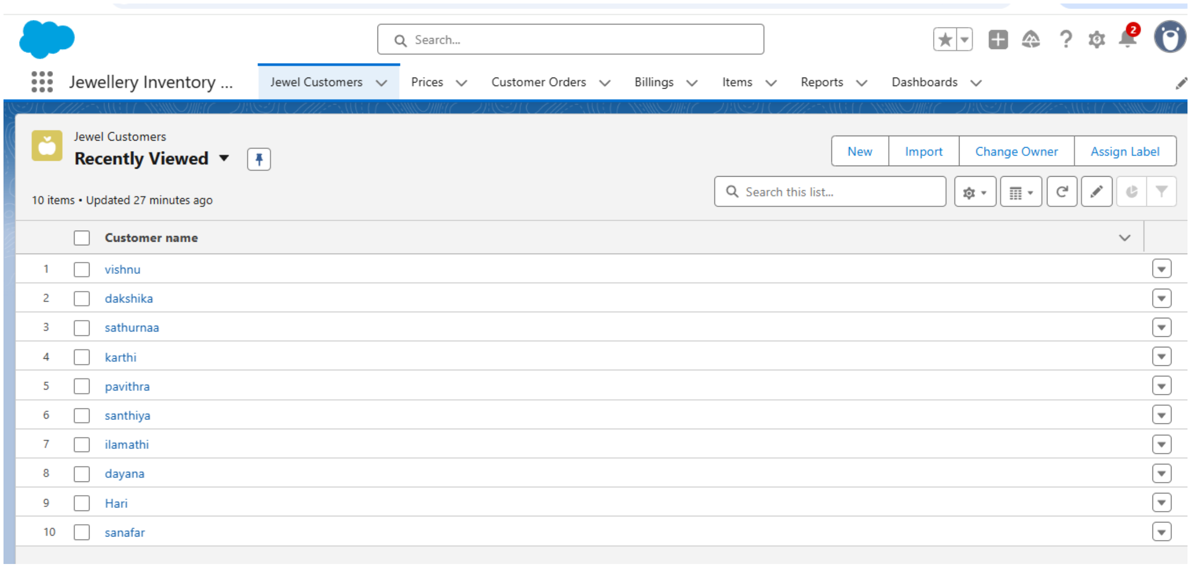
1. Click on App Launcher on the left side of the screen.
2. Search Jewelry Inventory System & click on it.
3. Click on Drop Down and Click on the Jewel Customer tab.
4. Click New.
5. Fill the Details and click on Save.



View a Record(Jewel Customer)

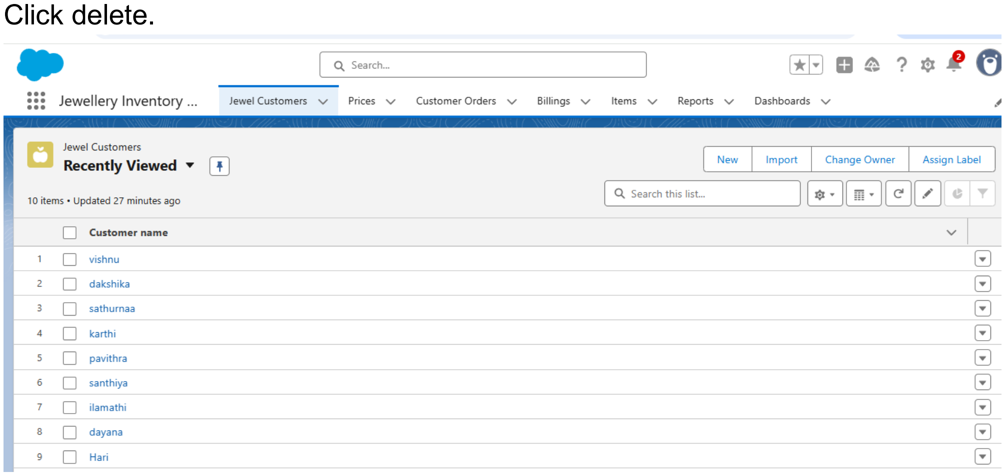
1. Click on App Launcher on the left side of the screen.

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.



Delete a Record(Jewel Customer)

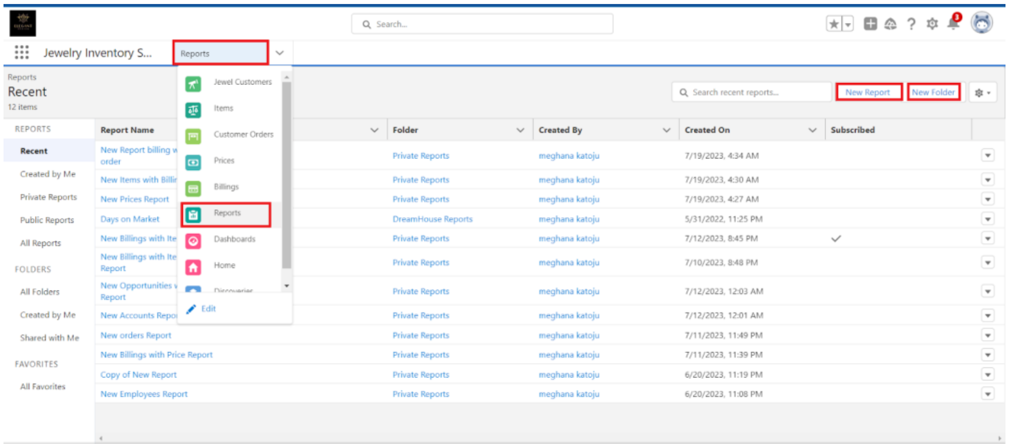
1. Click on App Launcher on the left side of the screen.
2. Search Jewelry Inventory System & click on it.
3. Click on the Jewel Customer Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete.



Milestone 14: Reports

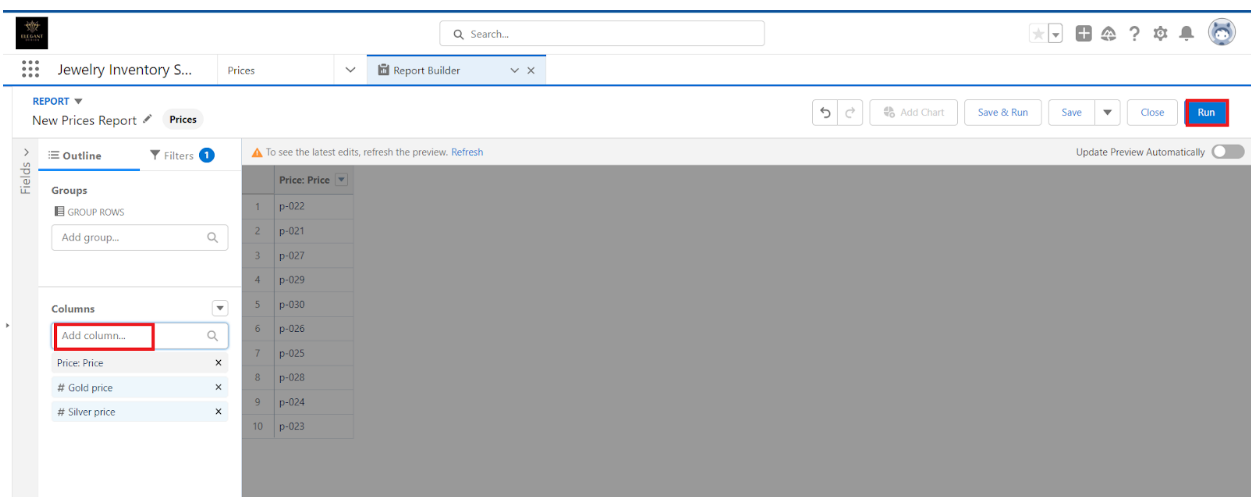
Create Report

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



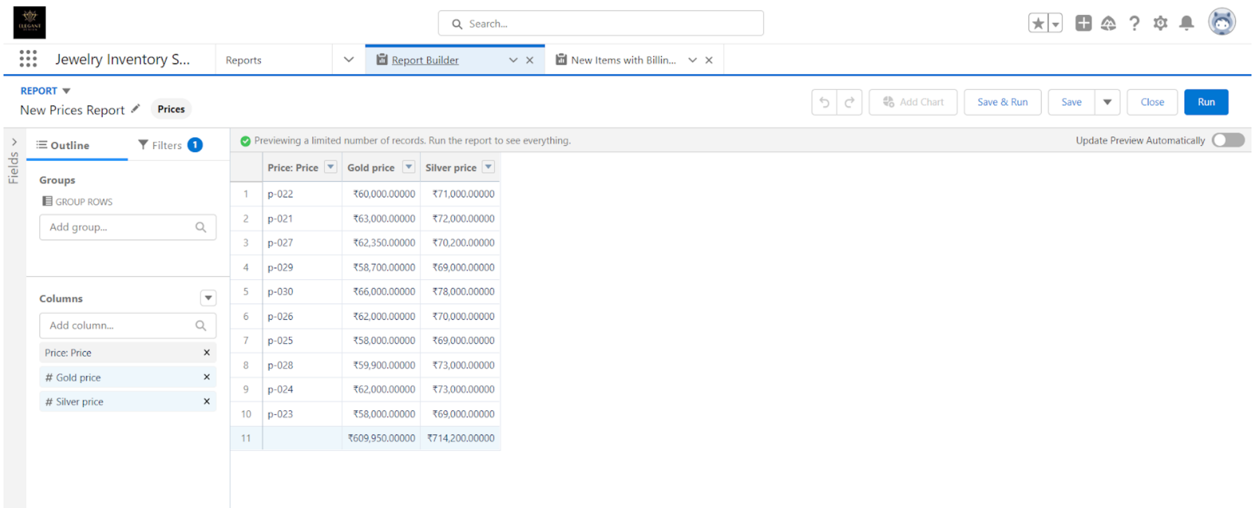
3. Select report type from category or from report type panel or from search panel ? click on start report.

4.Customise your report



- Add fields from the left pane as shown below.

5. Save or run it.



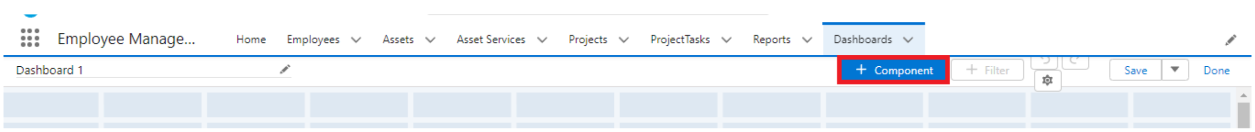
Reports

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

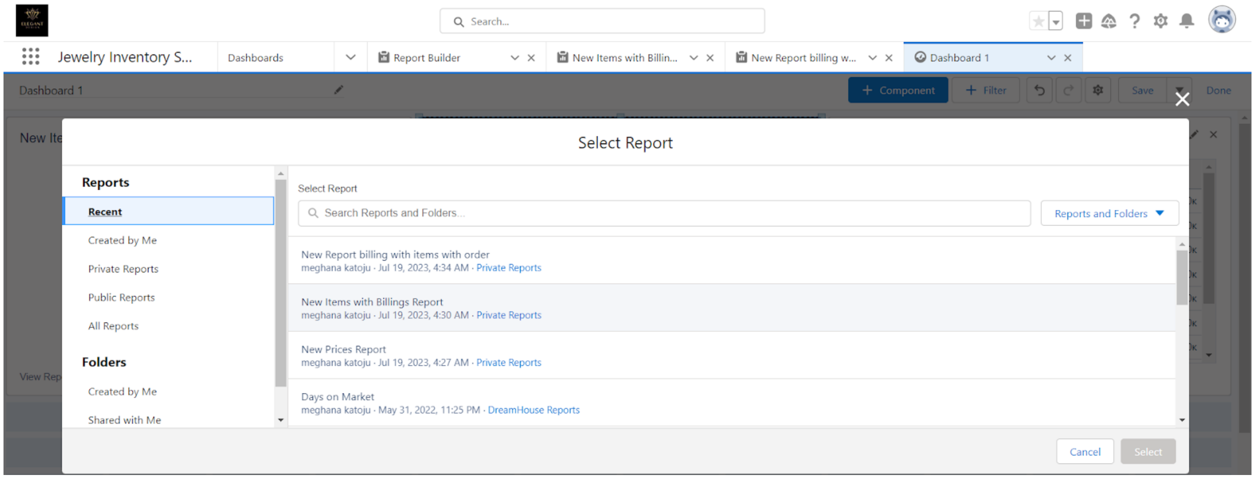
Milestone 15: Dashboards

Create Dashboard

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

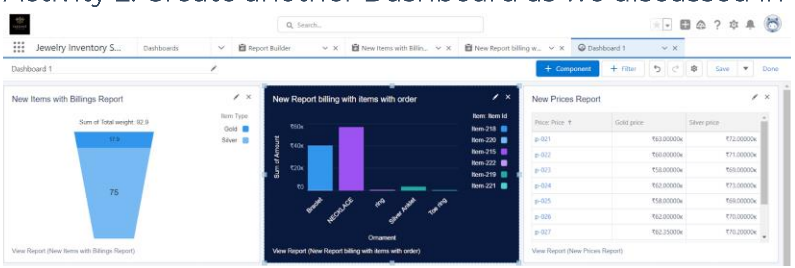


4. Select a Report and click on select.



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

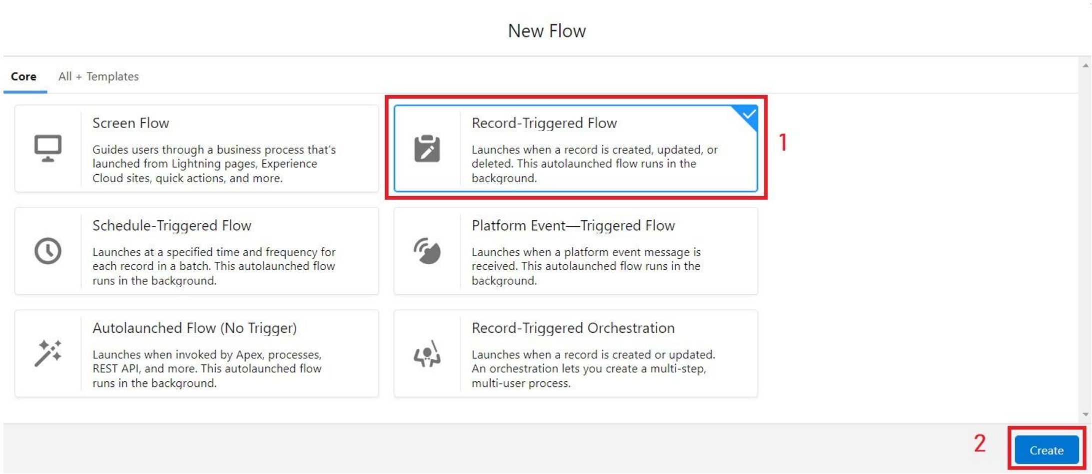
Activity 2: Create another Dashboard as we discussed in



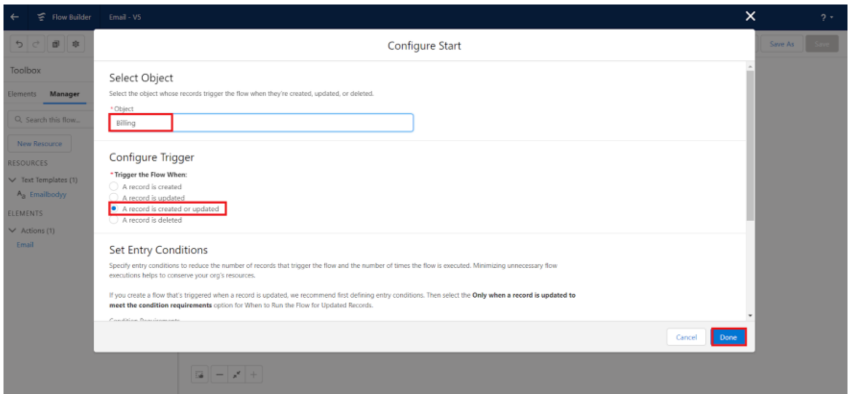
Milestone 16: Flows

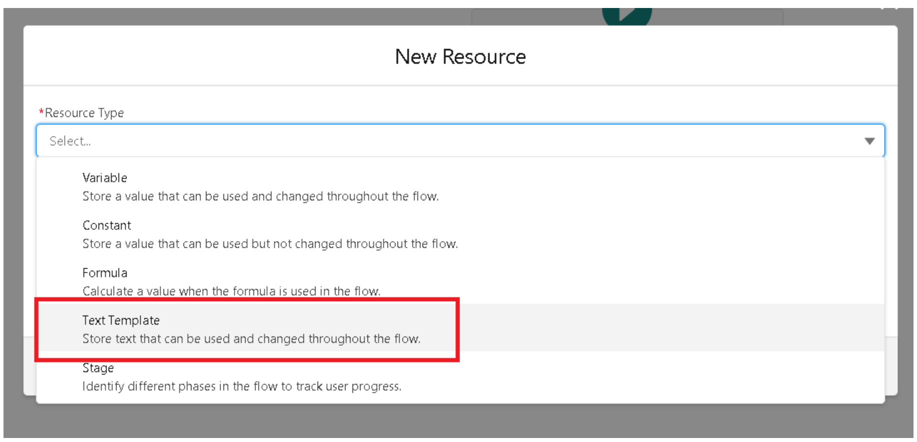
Create a Flow

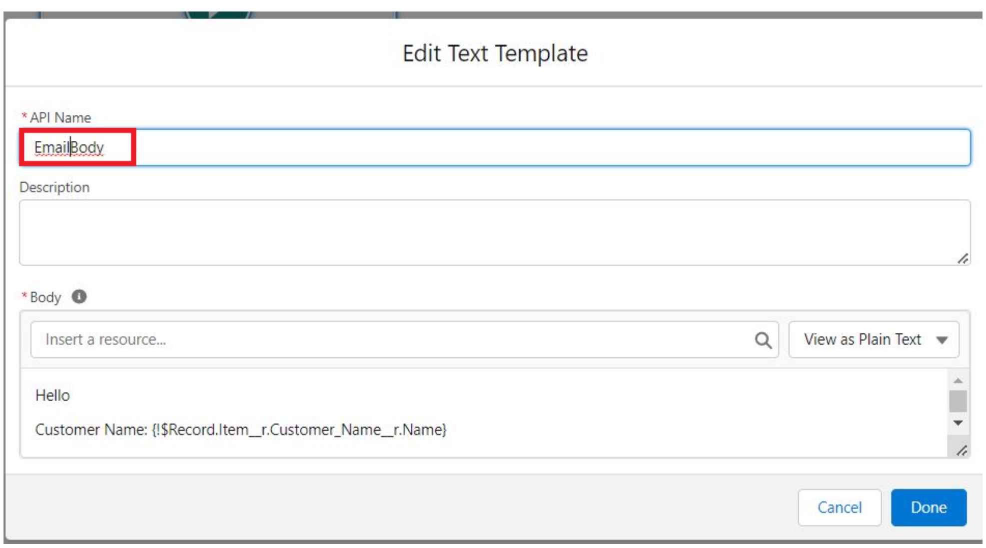
1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.
2. Select the Record-triggered flow and Click on Create.



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



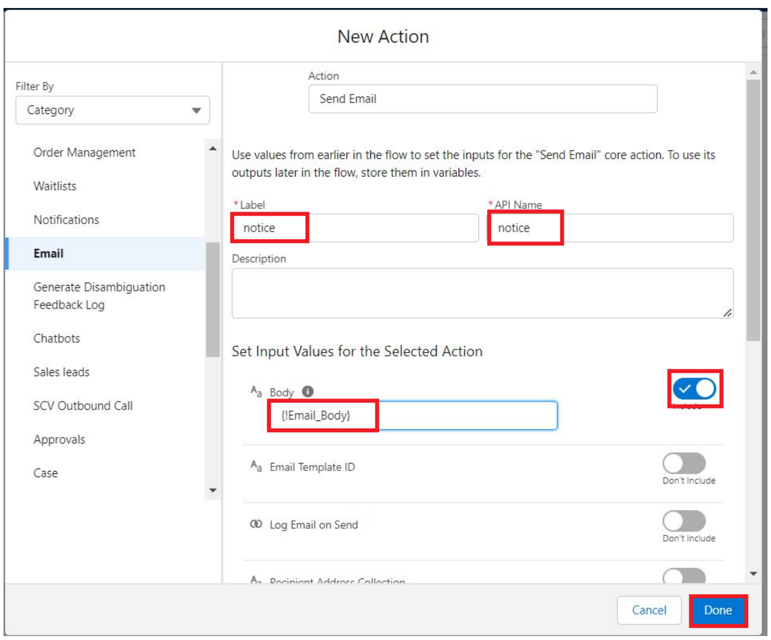




10. Change the view as Rich Text ? View to Plain Text.
11. In the body field paste the syntax that is given below.

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}

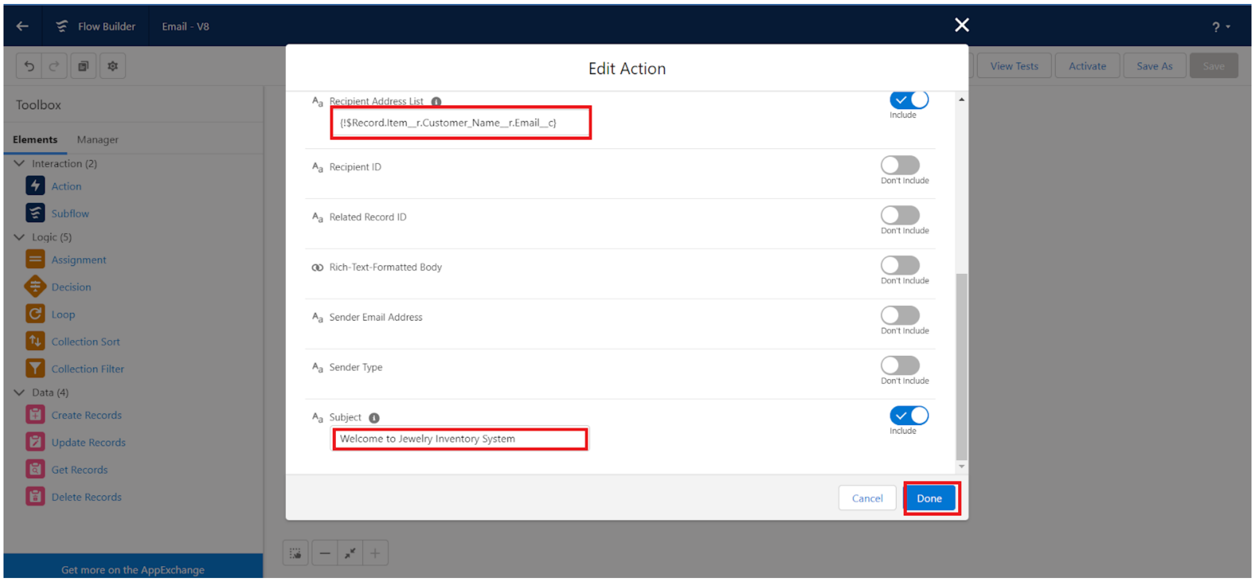
12. Click done.
13. Now click on elements, and drag the action element into the preview pane.
14. Their action bar will be opened in that search for " send email " and click on it.
15. Give the label name as " notice"
16. API name will be auto populated.
17. Enable the body in set input values for the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