

**KALLAM HARANADHAREDDY INSTITUTE OF
TECHNOLOGY
(AUTONOMOUS)**

Project Title

CRM Application for Jewel Management - (Developer)

By

BADIPATLA VENKATA NAGA SIMHA VINAY

218x1a4205@khitguntur.ac.in

CHIGURUPATI DHANUSH KRISHNA VENKAT

218x1a4214@khitguntur.ac.in

PERALI CHANDRA SEKHAR

218x1a4242@khitguntur.ac.in

MEDISETTY KARTHIK

218x1a4234@khitguntur.ac.in

PROJECT OVERVIEW

The Jewel Inventory System is a sophisticated software solution meticulously crafted to revolutionize and optimize the inventory and sales operations of jewellery stores and manufacturers.

This all-encompassing system is engineered to deliver an efficient, user-centric experience that ensures precision and control in managing an extensive range of jewellery items.

The Jewel Inventory System enables businesses to streamline inventory management by easily tracking and monitoring stock levels, categorizing items, and managing inventory across multiple locations with unparalleled accuracy.

Additionally, it simplifies sales transactions through an intuitive interface that supports quick invoicing, real-time updates, and seamless integration with various payment gateways.

With its commitment to accuracy, the system maintains comprehensive and detailed records of inventory movements, sales history, and customer data to ensure transparency and informed decision-making.

Designed with the end-user in mind, the system offers a straightforward, easy-to-navigate interface that enhances productivity and reduces the learning curve.

By leveraging cutting-edge technology and innovative features, the Jewel Inventory System empowers businesses to maintain operational excellence, optimize resources, and drive growth.

- 1.** Real Time Salesforce Project.
- 2.** Data Modelling.
- 3.** Creating an application.
- 4.** User Interface Customization.
- 5.** Object & Relationship in Salesforce.
- 6.** Formula fields and Validation rules.
- 7.** Field Dependencies.
- 8.** Record Types.
- 9.** Cross object formula fields.
- 10.** Conditional formatting.
- 11.** Flows.
- 12.** Email alerts and email templates.
- 13.** Reports & Dashboards.

INDEX

S. No.	Topics
1.	Salesforce
2.	Object
3.	Tabs
4.	The Lightning App
5.	Fields
6.	Profiles
7.	Roles
8.	Users
9.	Page layouts
10.	Record Types
11.	Permission sets
12.	Trigger
13.	Permission sets
14.	User Adoption
15.	Reports
16.	Dashboards
17.	Flows

INTRODUCTION

Introduction to CRM Application for Jewel Management

Welcome to the future of jewellery business management with the “CRM Application for Jewel Management”, a cutting-edge solution meticulously crafted by Salesforce developers to transform the way jewellery stores and manufacturers operate. This application harnesses the power and versatility of Salesforce to deliver a seamless, efficient, and user-friendly platform designed to manage customer relationships, inventory, and sales processes with unparalleled precision.

Key Features

1. Customer Relationship Management:

In the glittering world of jewellery, building strong relationships with customers is paramount. Our CRM application empowers jewellery businesses to maintain comprehensive records of customer interactions, purchase history, and preferences. This invaluable data enables businesses to offer personalized services, ensuring customer loyalty and satisfaction.

2. Inventory Management:

Efficient inventory management is the cornerstone of a successful jewellery business. Our application provides real-time updates on inventory levels, allowing businesses to track and control their stock with ease. Say goodbye to stockouts and overstocking, and ensure that your inventory is always optimized.

3. Sales Automation:

Streamline your sales processes with our advanced sales automation features. The application facilitates seamless transactions, automates workflows, and sends email alerts, making it easier for staff to process purchases, returns, and exchanges. Increase your sales efficiency and reduce manual efforts.

4. Reporting and Analytics:

Data-driven decisions are the key to business growth. Our CRM application offers robust reporting and analytics capabilities, providing insightful reports and dashboards that visualize key business metrics such as sales performance, inventory levels, and customer behaviour. Identify opportunities for growth and make informed decisions with ease.

5. User-Friendly Interface:

We understand that a user-friendly interface is crucial for effective adoption. Our application boasts an intuitive and customizable interface, allowing staff to navigate and use the system effortlessly. Tailor fields, tabs, and page layouts to meet the specific needs of your jewellery business.

By implementing the “CRM Application for Jewel Management”, jewellery businesses can unlock a new level of operational efficiency, enhance customer satisfaction, and drive sales growth. This Salesforce-based solution is tailored to address the unique challenges of the jewellery industry, providing a competitive edge and setting the stage for sustained success.

Methodology

The development of the CRM Application for Jewel Management followed a structured and systematic approach, ensuring the delivery of a high-quality, efficient, and user-friendly solution. The following phases were critical to the successful implementation of the application:

1. Requirement Gathering and Analysis

Stakeholder Meetings: Engage with key stakeholders, including jewellery store owners, managers, and sales staff, to understand their needs, pain points, and expectations.

Requirement Documentation: Compile a comprehensive list of functional and non-functional requirements.

Feasibility Study: Evaluate the technical, operational, and financial aspects of the project.

2. Design and Planning

System Architecture: Define the overall structure, components, and their interactions.

User Interface Design: Create wireframes and prototypes for an intuitive and user-friendly design.

Project Plan: Develop a detailed project plan outlining the timeline, milestones, and resource allocation.

3. Development

Agile Development: Adopt an Agile approach, breaking the project into iterative cycles (sprints) for continuous improvement and timely feature delivery.

Coding: Implement the application using Salesforce development tools and technologies, adhering to best practices and coding standards.

Version Control: Utilize version control systems to manage code changes and maintain development progress history.

4. Testing

Unit Testing: Verify the functionality of individual components.

Integration Testing: Ensure seamless interaction between components and correct data flow.

User Acceptance Testing (UAT): Engage end-users to validate requirements and gather feedback for further improvements.

5. Deployment

Production Environment Setup: Configure the production environment with necessary hardware, software, and network infrastructure.

Data Migration: Migrate existing data from legacy systems, ensuring data integrity and accuracy.

Deployment: Deploy the application to the production environment.

6. Training and Support

User Training: Conduct training sessions to equip end-users with the knowledge and skills needed to effectively use the application.

Documentation: Create comprehensive user manuals and documentation.

Ongoing Support: Establish a support system to address post-deployment issues or questions.

7. Maintenance and Continuous Improvement

Monitoring: Continuously monitor application performance to identify and address issues promptly.

Updates and Enhancements: Release regular updates and enhancements based on user and feedback evolving business needs.

Review and Optimization: Periodically review application functionality and performance for optimization.

Implementation Details

Implementation Details

MODULE-1. SALESFORCE

Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you. Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster.

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyse, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

Creating Developer Account

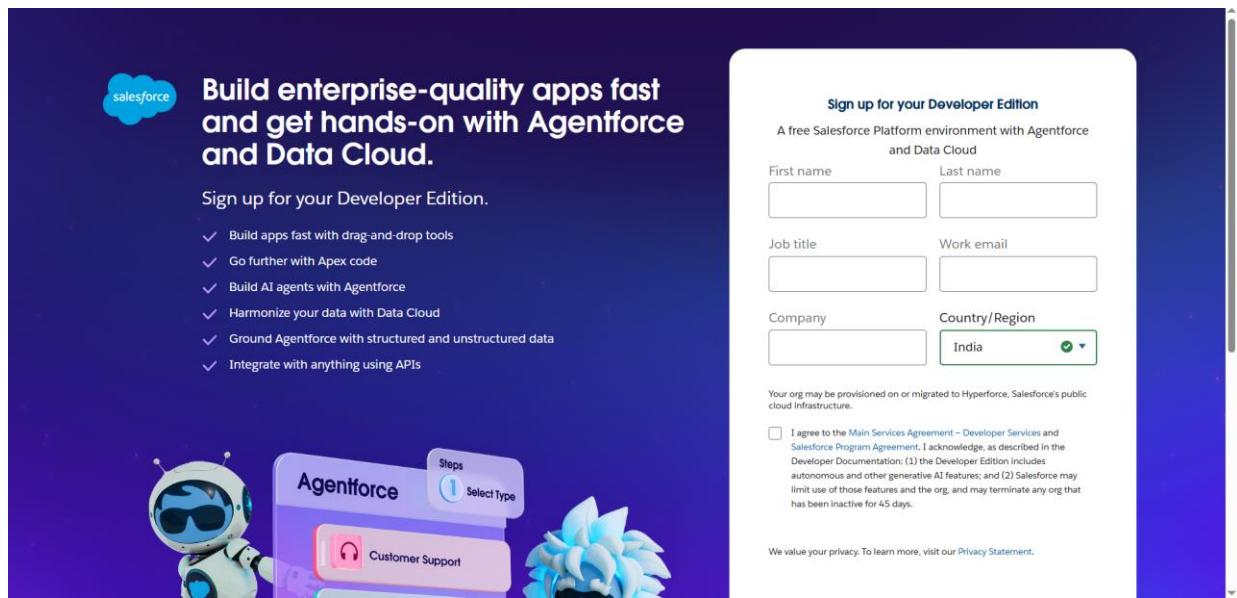
Creating a developer org in salesforce.

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 Name
5. Country: 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

Click on sign me up after filling these.



Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

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Agentforce Select type

Customer Support

Sign up for your Developer Edition

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First name Last name

Job title Work email

Company Country/Region India

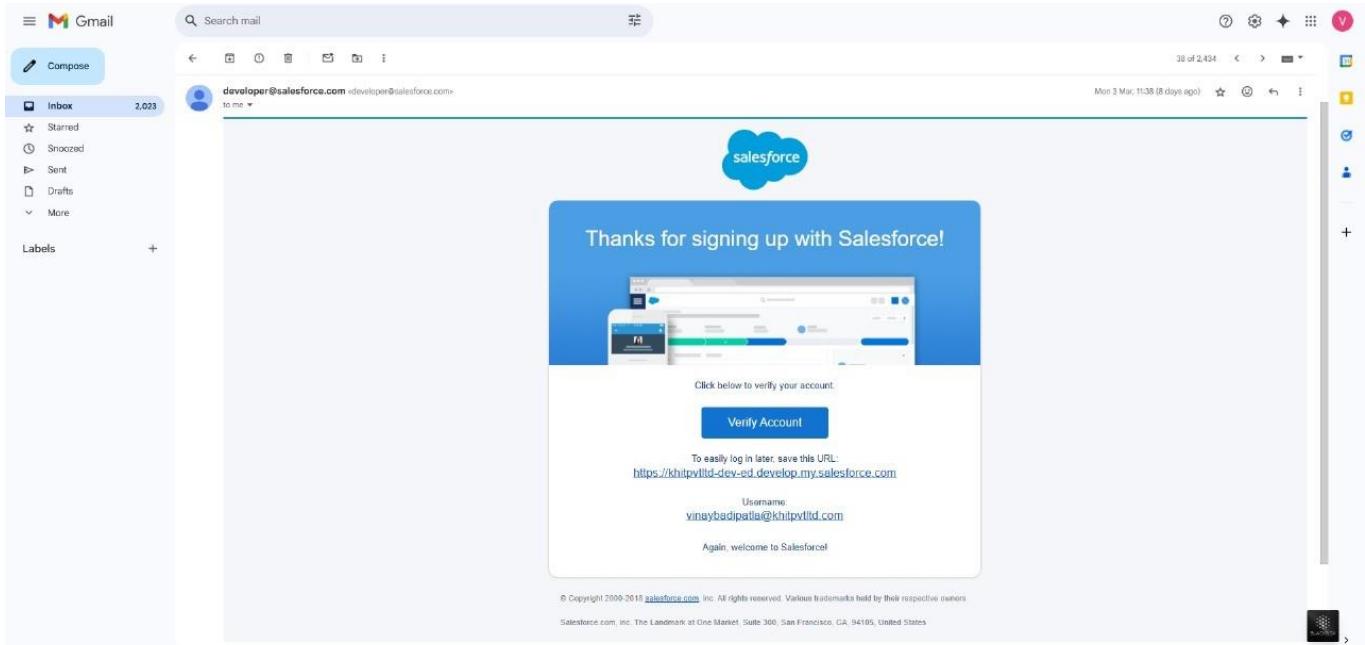
Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

We value your privacy. To learn more, visit our Privacy Statement.

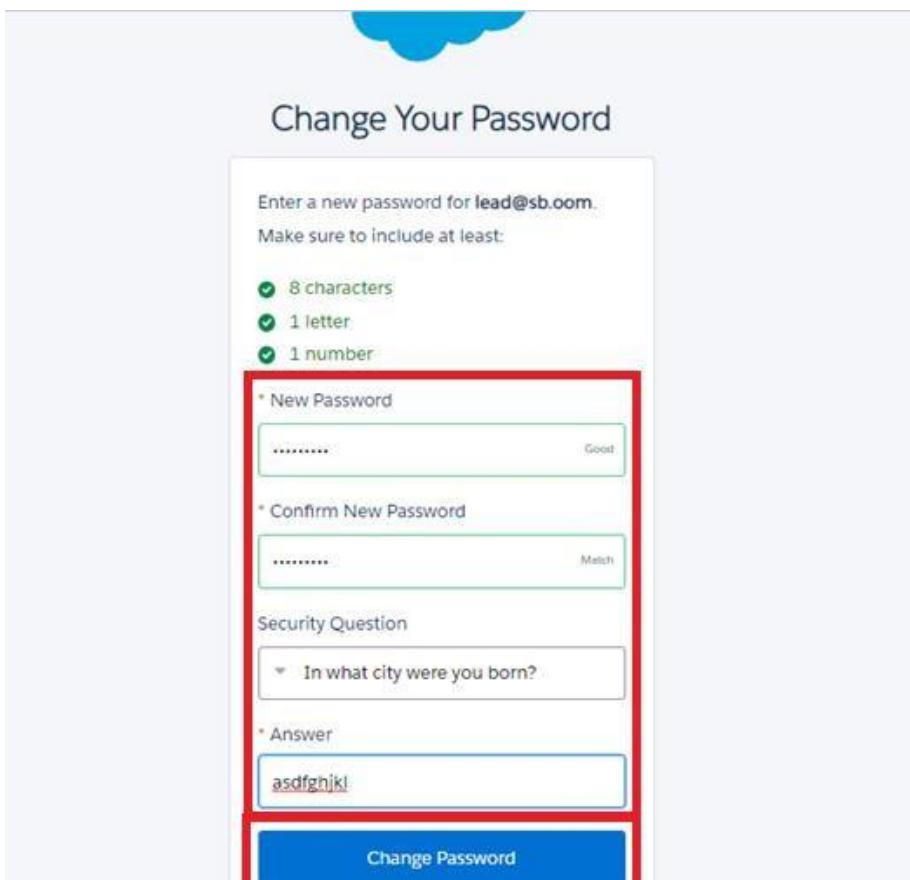
Account Activation

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.



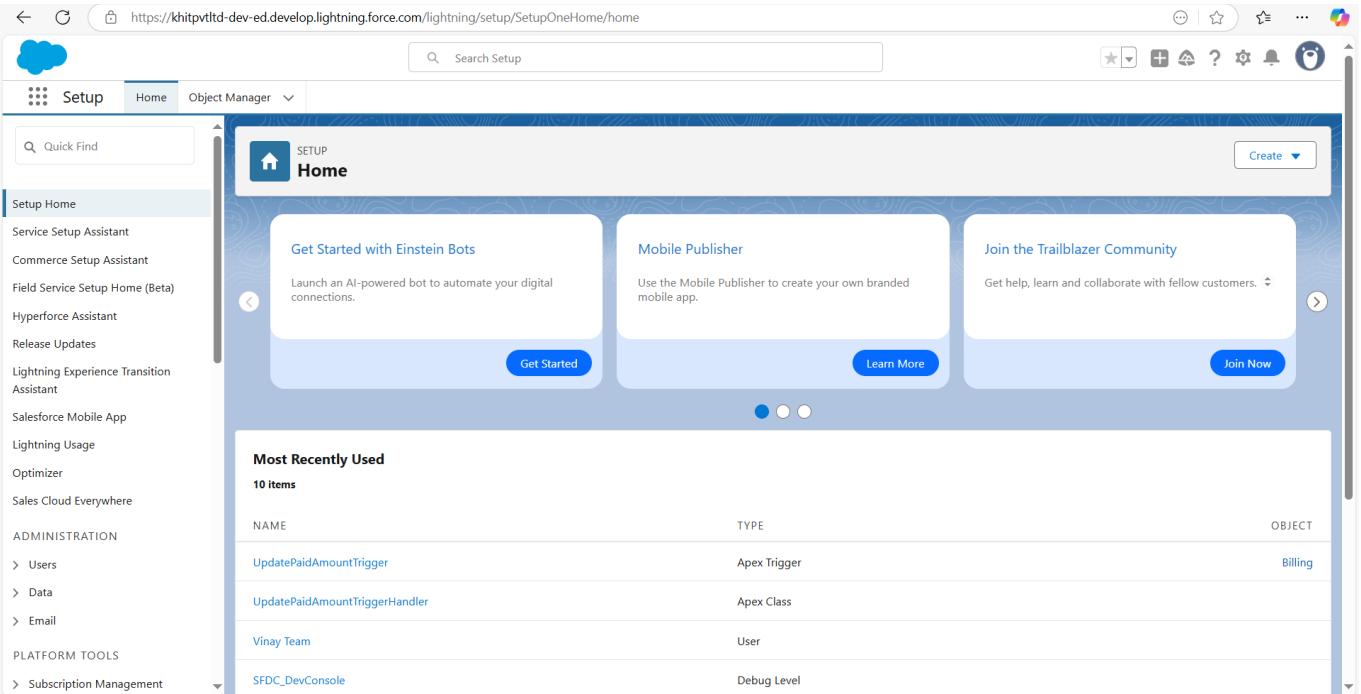
2. Click on Verify Account

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



The screenshot shows the Salesforce 'Change Your Password' page. At the top, it says 'Change Your Password'. Below that, it asks to enter a new password for lead@sb.oom. It specifies that the password must include at least 8 characters, 1 letter, and 1 number. A red box highlights the password input fields. The 'New Password' field contains '.....' and is labeled 'Good'. The 'Confirm New Password' field also contains '.....' and is labeled 'Match'. Below these are 'Security Question' and 'Answer' fields. The 'Security Question' dropdown is set to 'In what city were you born?'. The 'Answer' field contains 'asdfghjkl'. At the bottom is a blue 'Change Password' button.

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



The screenshot shows the Salesforce Setup Home page. The URL is https://khitptltd-dev-ed.lightning.force.com/lightning/setup/SetupOneHome/home. The page has a sidebar with links like Setup Home, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, Administration (Users, Data, Email), Platform Tools, and Subscription Management. The main content area shows 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Join the Trailblazer Community'. Below these are sections for 'Most Recently Used' items, showing 10 items with columns for NAME, TYPE, and OBJECT. Examples include 'UpdatePaidAmountTrigger' (Apex Trigger, Billing), 'UpdatePaidAmountTriggerHandler' (Apex Class, Billing), 'Vinay Team' (User, Billing), and 'SFDC_DevConsole' (Debug Level, Billing).

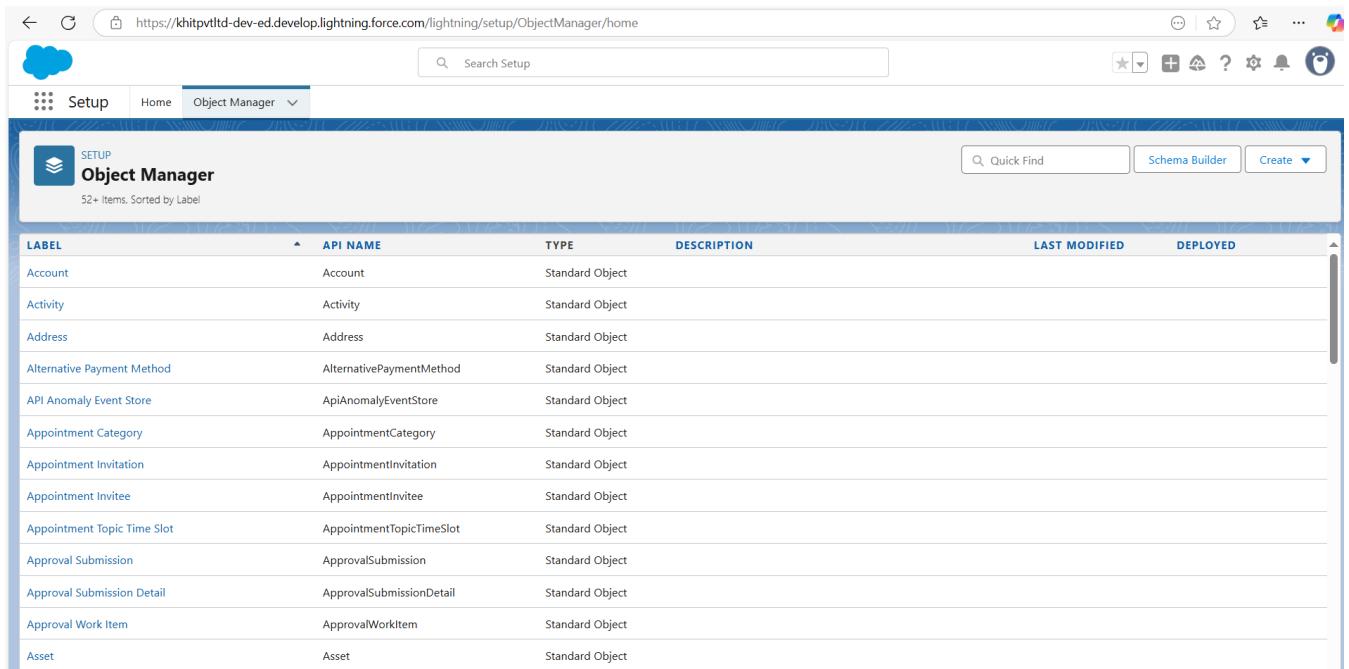
MODULE -2. Custom object creation

The custom objects that are created are –

1. Jewel Customer object
2. Item object
3. Order object
4. Price object
5. Billing object

To create custom object,

Go to salesforce org and click gear icon. Then go to object manager tab



The screenshot shows the Salesforce Object Manager page. At the top, there is a navigation bar with links for Setup, Home, and Object Manager. The main area is titled "Object Manager" and displays a table of standard objects. The columns in the table are labeled: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table lists various objects such as Account, Activity, Address, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Approval Submission, Approval Submission Detail, Approval Work Item, and Asset. Each row provides details about the object's API name, type (Standard Object), and last modified date.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Address	Address	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Approval Submission	ApprovalSubmission	Standard Object			
Approval Submission Detail	ApprovalSubmissionDetail	Standard Object			
Approval Work Item	ApprovalWorkItem	Standard Object			
Asset	Asset	Standard Object			

Label: Jewel Customer

1. Plural Label: Jewel Customer
2. Enter Record Name Label and Format
3. Record Name: customer name
4. Type: Text Data

5. Click on Allow Reports.

6. Save.

The screenshot shows the 'Object Manager' page for the 'Jewel Customer' object. On the left, a sidebar lists various configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main 'Details' tab is selected. The 'Details' section contains fields for Description, API Name (set to 'Jewel_Customer__c'), Custom (set to '✓'), Singular Label ('Jewel Customer'), and Plural Label ('Jewel Customers'). To the right, there are sections for Enable Reports (checkbox checked), Track Activities, Track Field History, Deployment Status (set to 'Deployed'), Help Settings, and Standard salesforce.com Help Window. At the bottom right are 'Edit' and 'Delete' buttons.

Now, repeat same steps to create Item, Order, Price, Billing Objects.

MODULE- 3. Tabs creation

Creating a Custom tab:

Go to setup page

Type Tabs in Quick Find bar

click on tabs

New (under custom object tab)

The screenshot shows the 'Custom Tabs' section of the Salesforce Setup page. The left sidebar has a search bar and links for User Interface, Rename Tabs and Labels, and Tabs. The 'Tabs' link is selected. The main area is titled 'Custom Tabs' with a sub-section 'Custom Object Tabs'. It displays a table with columns for Action, Label, Tab Style (with icons for Diamond, Computer, Car, Chip, and Fan), and Description. The table rows are: Edit | Del for Billings (Diamond style), Edit | Del for Customer Orders (Computer style), Edit | Del for Items (Car style), Edit | Del for Jewel Customers (Chip style), and Edit | Del for Prices (Fan style). Below this are sections for 'Web Tabs' (No Web Tabs have been defined) and 'Visualforce Tabs' (No Visualforce Tabs have been defined).

Select Object (Jewel Customer)

Select the tab style

Next (Add to profiles page) keep it as default

Next (Add to Custom App) keep it as default & save.

The screenshot shows the Salesforce Setup interface for creating a custom tab. The URL is https://khitptltd-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01rdM00000VQZsO%3Fsetupid%3DCustomTabs. The page title is 'Tabs'. On the left, there's a sidebar with 'User Interface' sections: 'Rename Tabs and Labels' and 'Tabs' (which is selected). A search bar at the top says 'Search Setup'. The main content area shows a 'Custom Object Tab' named 'Jewel Customers'. It includes fields for 'Tab Label' (Jewel Customers), 'Object' (Jewel Customer), 'Description' (empty), 'Created By' (Vinay Team), and 'Modified By' (Vinay Team). The 'Tab Style' is set to 'Chip'. There are 'Edit' and 'Delete' buttons at the top of the table row. A note below the tab name says 'Below is the information for the custom tab. Click Edit to change the custom tab.' A 'Help for this Page' link is also present.

Creating a Tab (Item):

Go to setup page

Type Tabs in Quick Find bar

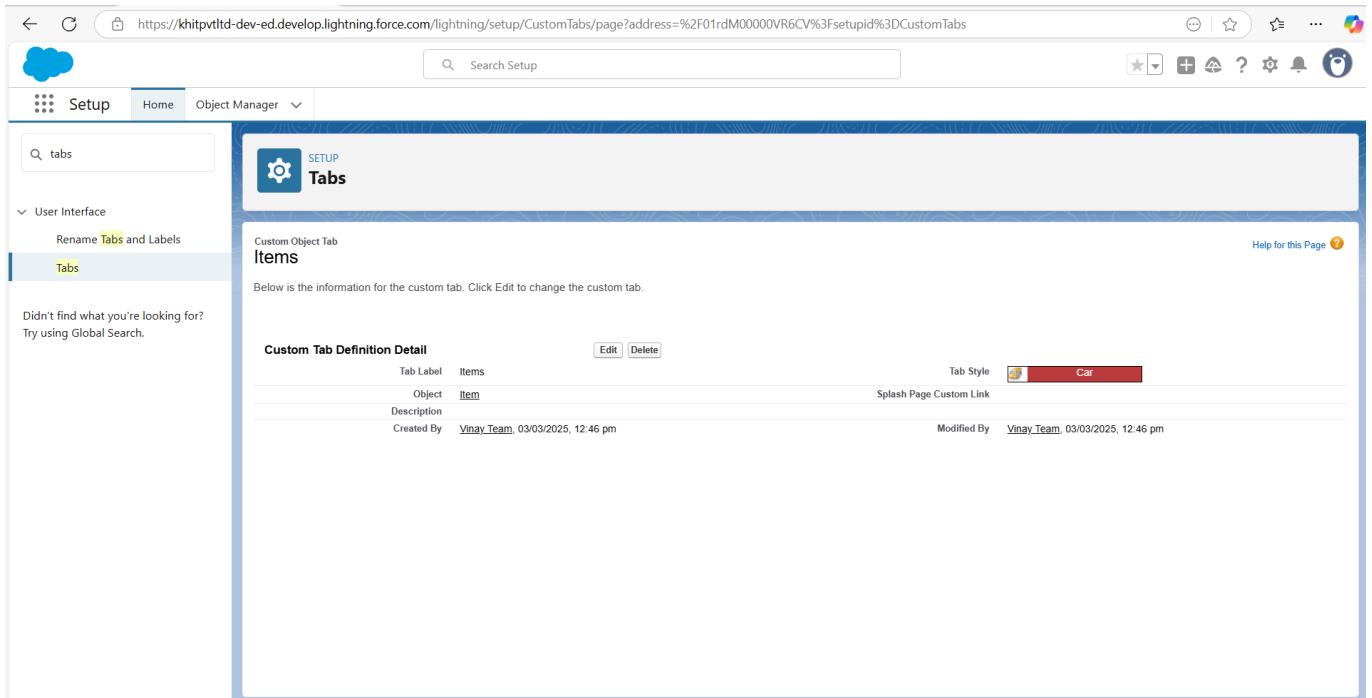
click on tabs New under custom object tab

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.



Repeat same steps for creating tabs for Customer Order, Price, Billing objects.

MODULE- 4. Create a Lightning app

To create a lightning app page:

Go to set up page.

Search app manager in quick find and

select app manager

Then click on “New Lightning app”

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

App Name: Jewellery Inventory System.

Developer Name: This will Auto Populates.

Description: Elevate your look with elegance.

Image: Optional.

Primary colour Hex: keep this default.

Then click Next.

Jewelry Inventory S... Jewel Customers ◆ Jewelry inventory ma... ◆ Jewelry inventory ma... ◆ Item-13 | Billing ◆ Vinay | Jewel Custom...

Vinay

Details

Customer Name: Vinay
City: guntur
Phone: 123456
Email: vinaybadipatla123@gmail.com
State: AP
Street: Old Guntur
Country: India
Zip/Postal code: 522001
Name: Vinay
Created By: Vinay Team, 06/03/2025, 2:27 pm

Owner: Vinay Team

Last Modified By: Vinay Team, 06/03/2025, 2:27 pm

Set Navigation Style as Console Navigation &Next.

To Add Navigation Items.

search for the items in the (Jewel Customer, Item, Customer Order, Price, Billing, Reports, Dashboard) from the search bar and move it using the arrow button.

Lightning App Builder App Settings Pages Jewelry Inventory System

Navigation Items

Available Items

- Accounts
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests
- Approval Submission Details
- Approval Submissions
- Approval Work Items

Selected Items

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

To Add User Profiles: System Administrator.

The screenshot shows the 'User Profiles' section of the Lightning App Builder. On the left, a sidebar lists 'App Settings' options: App Details & Branding, App Options, Utility Items (Desktop Only), Navigation Items, Navigation Rules, and User Profiles, which is currently selected. The main area is titled 'User Profiles' and contains a sub-header: 'Choose the user profiles that can access this app.' Below this is a 'Available Profiles' list, which is currently empty (0). To the right is a 'Selected Profiles' list containing 'System Administrator' and 'Gold Smith'. There are arrows between the two lists for moving profiles between them.

Click Save & Finish.

MODULE-5. Fields

In Salesforce org, click gear icon on the top left and select Setup to open Setup.

From the object manager page, In the Quick Find box, Search for the custom object you just created: Customer Order

From the sidebar, click Fields & Relationships and click new.

Creating Lookup Relationship:

1. Go to the setup page and click on object manager then type object name (Customer Order) in the quick find bar and 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 and Save.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The object is 'Customer Order'. The 'Fields & Relationships' tab is selected. The step is 'Step 1. Choose the field type'. The 'Data Type' section shows the 'None Selected' option is currently selected. Other options include 'Auto Number', 'Formula', 'Roll-Up Summary', 'Lookup Relationship' (which is selected), and 'Master-Detail Relationship'. The 'Master-Detail Relationship' description states: 'Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where: • The relationship field is required on all detail records. • The ownership and sharing of a detail record are determined by the master record. • When a user deletes the master record, all detail records are deleted. • You can create roll-up summary fields on the master record to summarize the detail records.' The 'Next Step' button is visible at the bottom right.

Now repeat the same for Master-Detail Relationship.

Creating Text Field

For Jewel Customer Object, Create the following fields:

7. City (Data type: Text)
8. Phone (Data type: Phone)
9. Email (Data type: Email)

For Item Object, Create the following fields:

10. Purity (Data type: Number)
11. Item type (Data type: Picklist) (Values: Gold, Silver)
12. Gold Price (return type: Currency)
(formula: Prices__r.Gold_price__c /10)

For Price Object, Create the following fields:

13. Gold Price (Data type: Currency)

Creating Remaining Fields in Objects:

Now create the remaining fields using the data types mentioned.

s.no	Object name	Fields	
1	Jewel Customer	Field Name	Data type
			Text (20)
			Text (20)
			Text (18)
			Text (6)

2	Price	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center; padding: 10px;">Silver Price</td><td style="text-align: center; padding: 10px;">Currency (Length=8, Decimal=5)</td></tr> </table>	Silver Price	Currency (Length=8, Decimal=5)																								
Silver Price	Currency (Length=8, Decimal=5)																											
3	Item	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Field Label: Customer Name</td><td style="width: 50%;">Lookup Relationship with Jewel Customer Object</td></tr> <tr> <td>Ornament</td><td>Text (20)</td></tr> <tr> <td>Weight</td><td>Number (Length=8, Decimal=5)</td></tr> <tr> <td>Stone Weight</td><td>Number (Length=5, Decimal=5)</td></tr> <tr> <td>Percentage</td><td>Number (Length=2, Decimal=0)</td></tr> <tr> <td>Stone/Other Price</td><td>Currency (Length=8, Decimal=2)</td></tr> <tr> <td>Expected Days of Return</td><td> Picklist <table border="1" style="margin-top: 10px; border-collapse: collapse;"> <tr><td>1-3 Days</td></tr> <tr><td>4-5 Days</td></tr> <tr><td>6-7 Days</td></tr> <tr><td>8-10 Days</td></tr> </table> </td></tr> <tr> <td>Priority</td><td> Picklist <table border="1" style="margin-top: 10px; border-collapse: collapse;"> <tr><td>Low</td></tr> <tr><td>Medium</td></tr> <tr><td>High</td></tr> <tr><td>Critical</td></tr> </table> </td></tr> <tr> <td>Silver Price</td><td>Formula (Return Type: Number) (Decimal=3)</td></tr> </table>	Field Label: Customer Name	Lookup Relationship with Jewel Customer Object	Ornament	Text (20)	Weight	Number (Length=8, Decimal=5)	Stone Weight	Number (Length=5, Decimal=5)	Percentage	Number (Length=2, Decimal=0)	Stone/Other Price	Currency (Length=8, Decimal=2)	Expected Days of Return	Picklist <table border="1" style="margin-top: 10px; border-collapse: collapse;"> <tr><td>1-3 Days</td></tr> <tr><td>4-5 Days</td></tr> <tr><td>6-7 Days</td></tr> <tr><td>8-10 Days</td></tr> </table>	1-3 Days	4-5 Days	6-7 Days	8-10 Days	Priority	Picklist <table border="1" style="margin-top: 10px; border-collapse: collapse;"> <tr><td>Low</td></tr> <tr><td>Medium</td></tr> <tr><td>High</td></tr> <tr><td>Critical</td></tr> </table>	Low	Medium	High	Critical	Silver Price	Formula (Return Type: Number) (Decimal=3)
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Low																												
Medium																												
High																												
Critical																												
Silver Price	Formula (Return Type: Number) (Decimal=3)																											

			(Prices_r.Silver_price_c / 1000)
	Purity Gold Price	Formula (Return Type: Currency) (Decimal=2)	((Prices_r.Gold_price_c * Purity_c) / 24) / 10
	Total Weight	Formula (Return Type: Number) (Decimal=3)	(Weight_c - Stone_weight_c)
	Amount	Formula (Return Type: Currency) (Decimal=3)	IF(ISPICKVAL(Item_Type_c , "Gold"), Total_weight_c * Purity_Gold_price_c , Total_weight_c * Silver_price_c)
	KDM	Formula (Return Type: Currency) (Decimal=0)	(Amount_c * Percentage_c) / 100
	Making Charges	Formula (Return Type: Currency) (Decimal=0)	IF(ISPICKVAL(Item_Type_c , "Gold"), Weight_c * 300 , Weight_c * 10)
4	Customer Order	Order Status	<p>Picklist</p> <ul style="list-style-type: none"> Started Not Started On Hold Completed Not Completed

5	Billing	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Field Label: Item</td><td>Lookup Relationship with Item Object</td></tr> <tr> <td>Ornament</td><td> Formula (Return Type: Text) <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item_r.Ornament_c</div> </td></tr> <tr> <td>Stone weight</td><td> Formula (Return Type: Number) (Decimal=2) <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item_r.Stone_weight_c</div> </td></tr> <tr> <td>Weight</td><td> Formula Return Type: Number (Decimal=2) <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item_r.Total_weight_c</div> </td></tr> <tr> <td>Amount</td><td> Formula (Return Type: Currency) (Decimal=2) <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item_r.Amount_c</div> </td></tr> <tr> <td>Gold/Silver Price</td><td> Formula (Return Type: Currency) (Decimal=2) <div style="border: 1px solid black; padding: 5px; width: fit-content;">IF(ISPIKVAL(Item_r.Item_Type_c,"Gold"), Item_r.Gold_price_c , Item_r.Silver_price_c)</div> </td></tr> <tr> <td>KDM Charge</td><td> Formula (Return Type: Currency) (Decimal=0) <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item_r.KDM_c</div> </td></tr> <tr> <td>Making Charges</td><td> Formula (Return Type: Currency) (Decimal=2) <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item_r.Making_Charges_c</div> </td></tr> <tr> <td>Stones/other price</td><td> Formula (Return Type: Currency) (Decimal=2) <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item_r.Stone_other_price_c</div> </td></tr> <tr> <td>Total Amount</td><td> Formula (Return Type: Currency) (Decimal=0) <div style="border: 1px solid black; padding: 5px; width: fit-content;">Amount_c + KDM_Charge_c + Stones_other_price_c + Making_Charges_c</div> </td></tr> </table>	Field Label: Item	Lookup Relationship with Item Object	Ornament	Formula (Return Type: Text) <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item_r.Ornament_c</div>	Stone weight	Formula (Return Type: Number) (Decimal=2) <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item_r.Stone_weight_c</div>	Weight	Formula Return Type: Number (Decimal=2) <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item_r.Total_weight_c</div>	Amount	Formula (Return Type: Currency) (Decimal=2) <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item_r.Amount_c</div>	Gold/Silver Price	Formula (Return Type: Currency) (Decimal=2) <div style="border: 1px solid black; padding: 5px; width: fit-content;">IF(ISPIKVAL(Item_r.Item_Type_c,"Gold"), Item_r.Gold_price_c , Item_r.Silver_price_c)</div>	KDM Charge	Formula (Return Type: Currency) (Decimal=0) <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item_r.KDM_c</div>	Making Charges	Formula (Return Type: Currency) (Decimal=2) <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item_r.Making_Charges_c</div>	Stones/other price	Formula (Return Type: Currency) (Decimal=2) <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item_r.Stone_other_price_c</div>	Total Amount	Formula (Return Type: Currency) (Decimal=0) <div style="border: 1px solid black; padding: 5px; width: fit-content;">Amount_c + KDM_Charge_c + Stones_other_price_c + Making_Charges_c</div>
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Schema Builder:

1. Go to setup
2. Click on object manager
3. Schema Builder

The screenshot shows the Salesforce Object Manager page. At the top, there's a navigation bar with 'Setup' and 'Object Manager'. Below it is a search bar labeled 'Search Setup'. The main area is titled 'Object Manager' with a sub-header '52+ Items, Sorted by Label'. There are three buttons at the top right: 'Quick Find', 'Schema Builder', and 'Create'. A table lists various objects with columns for 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. Some objects listed include Account, Activity, Address, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Approval Submission, Approval Submission Detail, Approval Work Item, and Asset.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Address	Address	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Approval Submission	ApprovalSubmission	Standard Object			
Approval Submission Detail	ApprovalSubmissionDetail	Standard Object			
Approval Work Item	ApprovalWorkItem	Standard Object			
Asset	Asset	Standard Object			

4. Select objects then Enter Objects as “Jewel Customer, Item, Customer Order, Price, Billing objects” in quick box and select them.

The screenshot shows the Schema Builder interface. At the top, there's a navigation bar with 'Setup' and 'Object Manager'. Below it is a search bar labeled 'Search Setup'. The main area is titled 'Schema Builder' with a sub-header 'Help for this Page'. On the left, there's a sidebar with 'Elements' and 'Objects' tabs, and a dropdown 'Select objects to display on the builder'. A list of objects is shown with checkboxes: Appointment Invitee, Appointment Topic Time Slot, Approval Submission, Approval Submission Detail, Approval Work Item, Asset, Asset Action, Asset Action Source, Asset Relationship, Associated Location, Asset State Period, Assigned Resource, Async Operation Tracker, Authorization Form, Authorization Form Consent, Authorization Form Data Use, Authorization Form Text, Billing, Business Brand, and Buyer Group. In the center, three objects are displayed as cards: 'Customer Order', 'Jewel Customer', and 'Item'. Each card shows its fields and their types. 'Customer Order' fields include Created By (Lookup(User)), Customer Name (Lookup(Jewel Customer)), Customer Order (Auto Number), Item: Silver Price (Master-Detail(item)), Last Modified By (Lookup(User)), and Order Status (Formula (Picklist)). 'Jewel Customer' fields include City (Text(20)), County (Text(10)), Created By (Lookup(User)), Customer Name (Text(80)), Email (Email), Last Modified By (Lookup(User)), Name (Text(10)), Owner (Lookup(User+1)), Phone (Phone), State (Text(20)), Street (Text(20)), and Zip/Postal code (Text(6)). 'Item' fields include Amount (Formula (Currency)), Created By (Lookup(User)), Customer Name (Lookup(Jewel Customer)), Expected Days Of Return (Picklist), Gold Price (Formula (Currency)), Item Id (Auto Number), Item Type (Picklist), KDM (Formula (Currency)), Last Modified By (Lookup(User)), Making Charges (Formula (Currency)), Ornament (Text(20)), and Owner (Lookup(User+1)). Relationships are shown as lines connecting fields like Customer Order's 'Created By' to Customer's 'Created By' and 'Last Modified By'.

Creating the field Dependencies:

1. Go to setup and click on Object Manager then type object name (Item) in quick find bar and click on the object.
2. Click on Fields & Relationships and click on the Priority field. Search for Field Dependencies and click on New.

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

3. Select Controlling Field as “Priority” and Depending field as “Expected Days of Return” then continue.

Action	Controlling Field	Dependent Field	Modified By
Edit Del	Priority	Expected Days Of Return	Vinay Team, 05/03/2025, 11:05 am

4. Select the “Expected Days of Return” values of related Priority values and Click

on Include Values and Save.

The screenshot shows the Salesforce Lightning Setup interface. The top navigation bar includes links for Home, Object Manager, and a Search Setup bar. On the left, a sidebar lists various setup categories like Service Setup Assistant, Commerce Setup Assistant, and Field Service Setup Home (Beta). The main content area is titled "Edit Field Dependency" and shows a table for defining dependencies between fields. The table has columns for "Controlling Field" (Priority) and "Dependent Field" (Expected Days Of Return). Below the table, a section titled "Instructions" provides tips for using the dependency editor. A legend indicates that yellow boxes represent "Included Value" and white boxes represent "Excluded Value". At the bottom, there are buttons for "Include Values" and "Exclude Values".

Setup Home

Service Setup Assistant

Commerce Setup Assistant

Field Service Setup Home (Beta)

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Subscription Management

SEARCH

Search Setup

SETUP

Help for this Page

Controlling Field Priority
Dependent Field Expected Days Of Return

▼ Instructions

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use Shift + click to select a range of adjacent cells.
- Double click on a cell to include its value in the dependent picklist.
- Use the Preview button to test the results.

Legend

Excluded Value
Included Value

Click button to include or exclude selected values from the dependent picklist:

Showing Columns: 1 - 4 (of 4) < Previous | Next > [View All](#) [Go to](#)

Priority:	Low	Medium	High	Critical
Expected Days Of Return:	1-3 Days	1-3 Days	1-3 Days	1-3 Days
	4-5 Days	4-5 Days	4-5 Days	4-5 Days
	6-7 Days	6-7 Days	6-7 Days	6-7 Days
	8-10 Days	8-10 Days	8-10 Days	8-10 Days

Click button to include or exclude selected values from the dependent picklist:

Showing Columns: 1 - 4 (of 4) < Previous | Next > [View All](#)

Creating the validation rule:

1. To create the validation rules, go to object manager tab and select Jewel Customer object.
2. Then click on validation rules. Click new.
3. Enter the Rule name as “Postal Code”.

The screenshot shows the Salesforce Object Manager Validation Rule Edit screen for the 'Jewel Customer' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Jewel Customer Validation Rule'. It includes a description of validation rules and a 'Validation Rule Edit' form. The 'Rule Name' field contains 'Postal_Code'. The 'Active' checkbox is checked. The 'Description' field is empty. On the right, there's a 'Quick Tips' section with 'Operators & Functions'. Below it is an 'Error Condition Formula' section with an example 'Discount_Percent_c>0.30' and a 'More Examples...' link. A note says 'Display an error if Discount is more than 30%'. A formula editor shows the following code:
AND(
OR(
LEN(Zip_Postal_code__c) <> 6,
NOT(REGEX(Zip_Postal_code__c, "^[0-9]{6}\$"))
,
NOT(ISBLANK(Zip_Postal_code__c)))

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. Also enter the error message as shown below.
6. Now create one more validation rule for jewel customer object.
7. Enter Rule name as “Validation Rule for Jewel Customer Object “.

Insert the Error Condition Formula as: -

“OR(ISBLANK(City_c), ISBLANK(Country_c),ISBLANK(Phone_c),ISBLANK(State_c),ISBLANK(Street_c))”

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

Create Validation rule for Item object.

Enter Rule name as “Validation Rule for Item”.

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))

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

MODULE-6. Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

1.Standard profiles:

By default, salesforce provides below standard profiles.

1. Contract Manager
2. Read Only
3. Marketing User
4. Solutions Manager
5. Standard User
6. System Administrator.

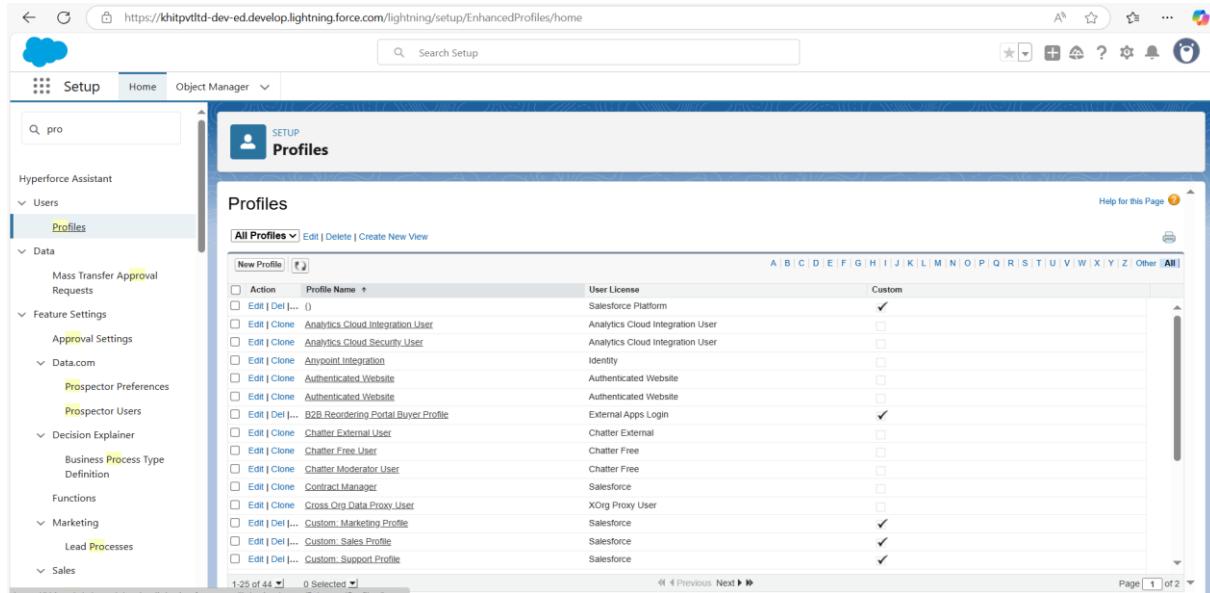
We cannot delete standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

2. Custom Profiles:

Custom ones defined by us.

They can be deleted if there are no users assigned with that particular one.



The screenshot shows the Salesforce Setup interface with the URL <https://khitptltd-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/home>. The left sidebar has a search bar with 'pro' typed in. Under 'Hyperforce Assistant', the 'Profiles' link is selected. The main content area is titled 'Profiles' and shows a table of profiles. The columns are 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Custom' column contains checked boxes for several profiles, such as 'Salesforce Platform', 'Analytics Cloud Integration User', and 'Salesforce'. There are also uncheckable boxes for other profiles like 'Authenticated Website' and 'External Apps Login'. The table includes a header row with letters A through Z and a 'All' button. At the bottom, there are navigation links for 'Previous' and 'Next' pages, and a page number indicator 'Page 1 of 2'.

Gold Smith Profile

1. Navigate to Setup

Access the Setup menu by clicking on the gear icon (⚙️) usually located in the upper right-hand corner of the screen.

2. Find Profiles

In the Quick Find box on the left-hand side, type profiles.
Click on the Profiles link that appears in the search results.

3. Clone System Administrator Profile

In the Profiles list, locate the System Administrator profile.

Click on the Clone action next to it.

A dialog box will appear. Enter Gold Smith as the new profile name.

Click on Save to create the new profile.

4. Edit the "Gold Smith" Profile

After saving, you will be redirected to the profile page for Gold Smith. Click on the Edit button at the top of the page.

The screenshot shows the Salesforce Setup interface with the URL <https://khttpvtltd-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edM00000Ar217>. The left sidebar is collapsed, showing sections like 'Users' (with 'Profiles' selected), 'Data', 'Feature Settings', 'Decision Explainer', 'Marketing', 'Sales', and 'Products'. The main content area is titled 'Profiles' and shows a profile for 'Gold Smith'. The profile details are: Name: Gold Smith, User License: Salesforce, Description: Vinay_Team, Created By: Vinay_Team (05/03/2025, 11:49 am), Modified By: Vinay_Team (06/03/2025, 12:35 pm). Below this is a 'Page Layouts' section showing assignments for various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, and Appointment Invitation across different record types like Invoice, Lead, Legal Entity, Location, and Location Group.

5. Set Custom Object Permissions

Scroll down the profile page to the Custom Object Permissions section. For each of the following objects, set the appropriate access permissions:

Jewel Customer: Assign desired access permissions (e.g., Read, Create, Edit, Delete).

Item: Assign desired access permissions.

Customer Order: Assign desired access permissions.

Prices: Assign desired access permissions.

Billings: Assign desired access permissions.

6. Save the Profile

Once all permissions are set, scroll down to the bottom of the page.

Click on the Save button to apply the changes.

Worker Profile

1. Navigate to Setup

Access the Setup menu by clicking on the gear icon (⚙️) usually located in the upper right-hand corner of the screen.

2. Find Profiles

In the Quick Find box on the left-hand side, type profiles.

Click on the Profiles link that appears in the search results.

3. Clone Salesforce Platform User Profile

In the Profiles list, locate the Salesforce Platform User profile.

Click on the Clone action next to it.

A dialog box will appear. Enter Worker as the new profile name.

Click on Save to create the new profile.

4. Edit the "Worker" Profile

After saving, you will be redirected to the profile page for Worker.

Click on the Edit button at the top of the page.

The screenshot shows the Salesforce Lightning Experience interface. The top navigation bar includes a back arrow, a refresh icon, a search bar with the placeholder 'Search Setup', and a gear icon for settings. The URL in the address bar is <https://khitptltd-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edM00000Ar2ab>. The main content area has a blue header with the title 'Profiles'. On the left, there's a sidebar with a 'Setup' tab and other categories like 'Users', 'Data', 'Feature Settings', 'Data.com', 'Decision Explainer', 'Marketing', and 'Sales'. The 'Profiles' tab is currently selected. The main body shows a table for 'Profile Detail' with columns for Name (Worker), User License (Salesforce Platform), Description, Created By (Vinay_Team), Modified By (Vinay_Team), and a 'Custom Profile' checkbox which is checked. Below this is a 'Page Layouts' section with tables for 'Standard Object Layouts' and 'Custom Object Layouts'. The 'Standard Object Layouts' table includes rows for Global, Email Application, Home Page Layout, Account, Alternative Payment Method, and Appointment Invitation. The 'Custom Object Layouts' table includes rows for Fulfillment Order Item Tax, Fulfillment Order Product, Idea, Individual, Invoice, and Invoice Line. Each row shows the layout name and a 'View Assignment' link. The bottom of the page has a 'Help for this Page' link and a scroll bar.

5. Set Custom Object Permissions

Scroll down the profile page to the Custom Object Permissions section. For each of the following objects, set the appropriate access permissions:

Items: Assign desired access permissions (e.g., Read, Create, Edit, Delete).

Price: Assign desired access permissions.

Customer Order: Assign desired access permissions.

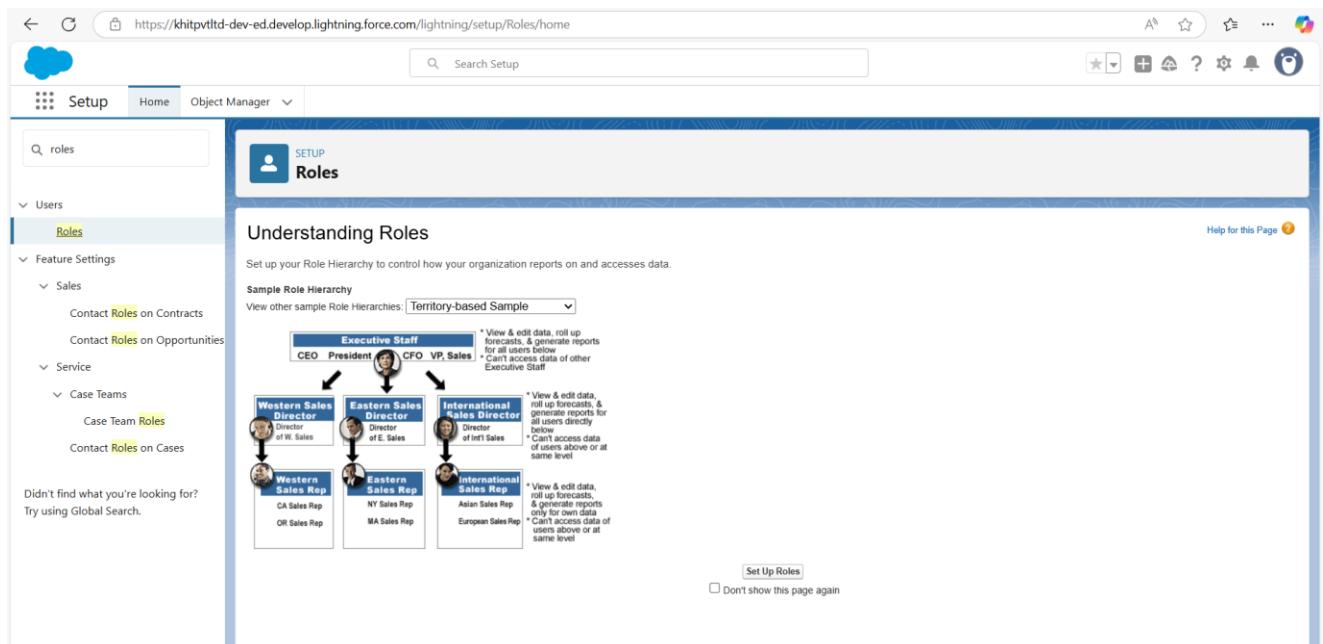
6. Save the Profile

Once all permissions are set, scroll down to the bottom of the page.

Click on the Save button to apply the changes.

MODULE-7. Roles

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organisation can have to data. Simply put, it describes what a user could see within the Salesforce organisation.



Creating Gold Smith Role

1. Navigate to Setup

Access the Setup menu by clicking on the gear icon () usually located in the upper right-hand corner of the screen.

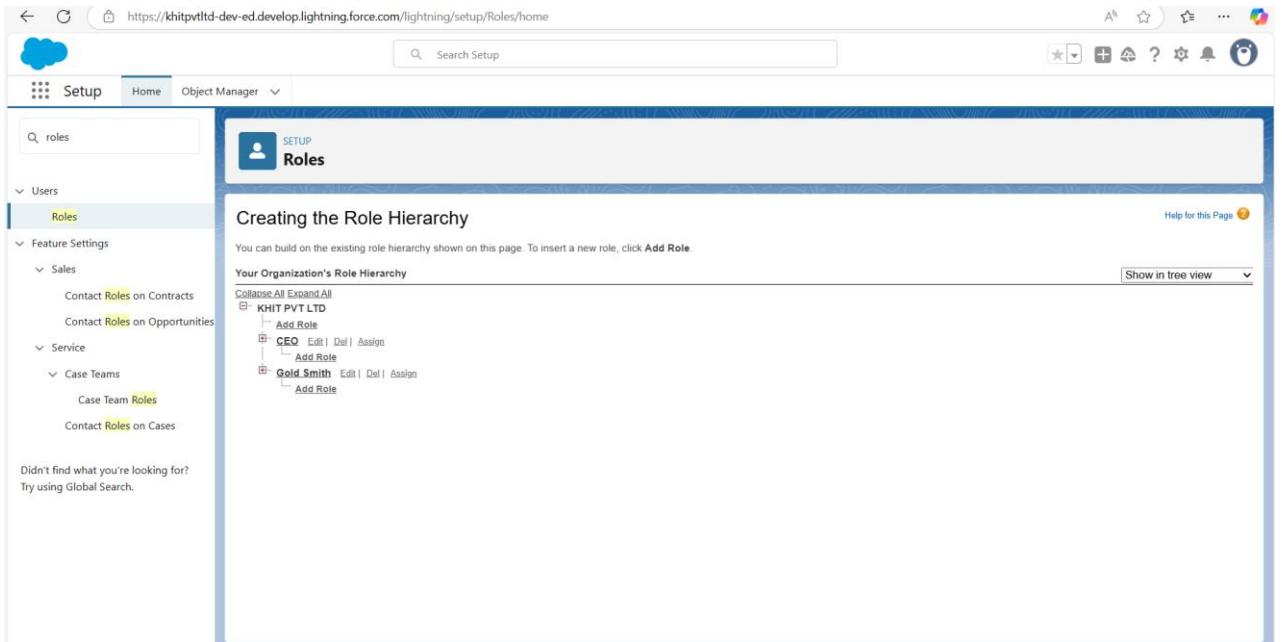
2. Search for Roles

In the Quick Find box on the left-hand side, type roles.

Click on the Set Up Roles link that appears in the search results.

3. Expand Roles Hierarchy

On the Roles page, click on the Expand All button to view the full hierarchy of roles.



The screenshot shows the Salesforce Setup - Roles page. The left sidebar has a search bar and navigation links for Users, Roles, Feature Settings, Sales, Service, and Case Teams. The main content area is titled "Creating the Role Hierarchy" and displays "Your Organization's Role Hierarchy". It shows a hierarchical tree starting with "KHIT PVT LTD" which has "CEO" and "Gold Smith" as children. Each node has "Edit | Del | Assign" options. A "Show in tree view" dropdown is visible in the top right. A message at the bottom left says "Didn't find what you're looking for? Try using Global Search."

4. Add New Role

Under the role to which the "Gold Smith" role will report, click on the Add Role button.

5. Configure the New Role

Label: Enter Gold Smith.

Role Name: This field will auto-populate based on the Label.

Reports In the new role configuration page, fill in the following fields:

to: Select the role to which "Gold Smith" will report.

6. Save the New Role

Click on the Save button to create the new role.

MODULE-8. **Users**

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

The user account identifies the user, and the user account settings determine what features and records the user can access.

Each user account contains at least the following:

1. Username
2. Email Address
3. User's First Name (optional)
4. User's Last Name
5. Alias
6. Nickname
7. Licence
8. Profile
9. Role (optional)

The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar shows navigation options like 'Setup', 'Home', and 'Object Manager'. The main area displays a table of users with the following data:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter.Expert	Chatter	chatty_00ddm00000i2noxuar.5txbufcupip@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Jobs_Steve	sjobs	216x1a4290@khiltguntur.ac.in	Worker	✓	0
<input type="checkbox"/> Edit	Kors_Michael	mkors	prathyushat165@gmail.com	Worker	✓	0
<input type="checkbox"/> Edit	Mikaelson_Kol	kmika	vinaybadipatla123@gmail.com	Worker	✓	0
<input type="checkbox"/> Edit	Mikaelson_Niklaus	nmika	vinaybadipatla1234@gmail.com	Gold_Smith	✓	Gold Smith
<input type="checkbox"/> Edit	Team_Vinay	vTeam	vinaybadipatla@khiltvltl.com		✓	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00ddm00000i2noxuar.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightsssecurity@00ddm00000i2noxuar.com		✓	Analytics Cloud Security User

Create User

1. Go to Setup Menu:

Log in to your Salesforce account.

Click on the gear icon in the upper right corner of the screen.

Select Setup from the dropdown menu.

2. Navigate to Users:

Click on Users under User Management.

3. Create a New User:

Click on the New User button at the top of the Users page.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, a sidebar lists various setup categories like 'Permission Set Groups', 'Profiles', 'Public Groups', etc., with 'User Management Settings' expanded. Under 'User Management Settings', the 'Users' option is selected. The main content area displays the 'User Detail' form for a user named 'Niklaus Mikaelson'. The form includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Federation ID, and App Registration. To the right of the form, there is a list of active profiles for this user, including 'Gold Smith', 'Salesforce', and 'Gold Smith'. Other profile options like 'Marketing User', 'Offline User', 'Knowledge User', etc., are listed with checkboxes. At the bottom right of the form, there are checkboxes for 'Mobile Push Registrations', 'Data.com User Type', 'Accessibility Mode (Classic Only)', 'Debug Mode', 'High-Contrast Palette on Charts', and 'Load Lightning Pages While Scrolling'.

4. Fill in the Required Fields:

First Name: Enter the first name (e.g., Niklaus).

Last Name: Enter the last name (e.g., Mikaelson).

Alias: Enter an alias name (a short name or abbreviation).

Email: Enter your personal email address.

Username: Enter a username in the format of vivek@khit.com (e.g., niklaus.mikaelson@company.com).

Nickname: Enter a nickname.

Role: Select Gold Smith from the dropdown menu.

User License: Select Salesforce from the dropdown menu.

Profile: Select Gold Smith from the dropdown menu.

5. Save the New User:

After filling in all the required fields, click the Save button at the bottom of the page.

User 2

1. Go to Setup Menu:

Log in to your Salesforce account.

Click on the gear icon in the upper right corner of the screen.

Select Setup from the dropdown menu.

2. Navigate to Users:

In the Quick Find box on the left side of the Setup screen, type Users.

Click on Users under User Management.

3. Create a New User:

Click on the New User button at the top of the Users page.

4. Fill in the Required Fields for the First User:

First Name: Kol

Last Name: Mikaelson

Alias: Enter an alias name (a short name or abbreviation).

Email: Enter your personal email address.

Username: Enter a username in the format of vivek@khit.com (e.g., kol.mikaelson@company.com).

Nickname: Provide a nickname.

Role: Select Worker from the dropdown menu.

User License: Select Salesforce Platform from the dropdown menu.

Profile: Select Worker from the dropdown menu.

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with various setup categories like Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. Under User Management Settings, the 'Users' section is selected. The main content area is titled 'User Detail' for a user named 'Michael Kors'. The 'Role' is set to 'Worker'. Other details include 'Email' (prathyusha1165@gmail.com), 'Nickname' (User17411578480627431688), 'Title' (Marketing User), and 'Active' status (checked). There are tabs for 'Edit', 'Sharing', 'Reset Password', 'Freeze', and 'View Summary'. A 'User ProfileHelp for this Page' link is also present.

5. Save the New User:

After filling in all the required fields, click the Save button at the bottom of the page.

MODULE-9. Page layouts

Page Layout in Salesforce allows us to customise the design and organise detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

To Create a Gold Page layout

1. Go to Setup Menu:

Log in to your Salesforce account.

Click on the gear icon in the upper right corner of the screen.

Select Setup from the dropdown menu.

2. Navigate to Object Manager:

In the Quick Find box on the left side of the Setup screen, type Object Manager.
Click on Object Manager.

3. Search for the Object (Item):

In the Object Manager, use the search bar to find the object named Item.
From the dropdown menu next to the object, click on Edit.

The screenshot shows the Salesforce Object Manager interface for the 'Item' object. The left sidebar lists various setup categories, and the main area shows the 'Fields' section for the 'Gold' page layout. A table displays fields such as Customer Name, Item Type, Ornament, Priority, Silver Price, and Weight. A specific field, 'Total Weight', is highlighted with a yellow box. The 'Item Sample' panel below provides a preview of sample data for these fields.

4. Create a New Page Layout:

Click on Page Layout in the left sidebar.

Click on the New button to create a new page layout.

5. Name the Page Layout:

In the Page Layout Name field, enter the name Page Layout for Gold.

Click on the Save button.

6. Arrange the Fields:

In the Information Section, arrange the fields as shown in the example.

Remove any fields that are related to Silver.

Click Ok to confirm the changes.

7. Save the Page Layout:

After arranging the fields and making the necessary changes, click the Save button.

To Create a Sliver Page layout

1. Go to Setup Menu:

Log in to your Salesforce account.

Click on the gear icon in the upper right corner of the screen.

Select Setup from the dropdown menu.

2. Navigate to Object Manager:

In the Quick Find box on the left side of the Setup screen, type Object Manager.

Click on Object Manager.

3. Search for the Object (Item):

In the Object Manager, use the search bar to find the object named Item.

From the dropdown menu next to the object, click on Edit.

The screenshot shows the Salesforce Setup interface for managing objects. The top navigation bar includes links for Home, Object Manager, and a search bar. The main content area is titled 'SETUP > OBJECT MANAGER' and shows the 'Item' object. On the left, a sidebar lists various setup categories. The 'Page Layouts' category is currently selected. The main workspace displays the 'Silver' page layout for the 'Item' object. It features a 'Fields' section with a table showing fields like Customer Name, Item Type, and Price, each with a 'Layout Properties' button. Below this is a 'Highlights Panel' with sections for Percentage (99), Item Type (Sample Text), Last Modified By (Sample Text), Owner (Sample Text), and Item Id (GEN-2004-001234). At the bottom, a note states: 'Actions in this section are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for the publisher on pages that use this layout.'

4. Create a New Page Layout:

Click on Page Layout in the left sidebar.

Click on the New button to create a new page layout.

5. Name the Page Layout:

In the Page Layout Name field, enter the name Page Layout for Silver.

Click on the Save button.

6. Arrange the Fields:

In the Information Section, arrange the fields as shown in the example.

Remove any fields that are related to Gold.

Click Ok to confirm the changes.

7. Save the Page Layout:

After arranging the fields and making the necessary changes,

click the Save button.

MODULE-10. Record Types

Record Types are a way of grouping many records of one type for that object. These can be applied to any standard or custom object, and allow you to have a different page layout, fields, required fields, and picklist values. Record types allow administrators to create a different page layout with custom picklist fields and values for the same business process and various business processes

1. Go to Setup Menu:

Log in to your Salesforce account.

Click on the gear icon in the upper right corner of the screen.

Select Setup from the dropdown menu.

2. Navigate to Object Manager:

In the Quick Find box on the left side of the Setup screen, type Object Manager.

Click on Object Manager.

3. Search for the Object (Item):

Use the search bar in the Object Manager to find the object named Item.

Click on the object from the search results.

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'SETUP > OBJECT MANAGER' and contains a list of options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types (which is selected), Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Record Type Gold' and includes a link to 'Back to Custom Object: Item'. It displays the following details:

Record Type Label	Gold
Record Type Name	Gold
Namespace Prefix	
Description	Gold items information
Created By	Vinay_Team
Modified By	Vinay_Team
Active	✓

Below this, there is a section titled 'Picklists Available for Editing' with the following data:

Action	Field	Modified Date
Edit	Expected Days Of Return	05/03/2025, 2:24 pm
Edit	Item Type	05/03/2025, 2:24 pm
Edit	Priority	05/03/2025, 2:24 pm

4. Edit the Object:

From the dropdown menu next to the object, click on Edit.

5. Create a New Record Type:

Click on Record Types in the left sidebar.

Click on the New button to create a new record type.

6. Fill in the Required Fields:

Select Existing Record Type: Choose Master.

Record Type Label: Enter Gold.

Description: Enter Gold items information.

7. Manage Profile Availability:

Uncheck the Make Available checkbox.

Scroll down and check the boxes for the profiles Gold Smith, Worker, and System Administrator.

Click on Next.

8. Apply Different Layout for Each Profile:

Select Apply a different layout for each profile.

Change the page layout to Page Layout for Gold for the profiles Gold Smith, Worker, and System Administrator.

Click on Save & New.

Creating Another Record Type

Follow the same steps as above to create a new record type with the

Record Type Label: Silver

Description: Silver items information

Page Layout: Use Page Layout for Silver

MODULE-11. Permission sets

A standard permission set consists of a group of common permissions for a particular feature associated with a permission set licence. Using a standard permission set saves you time and facilitates administration because you don't need to create the custom permission set.

The screenshot shows the Salesforce Setup interface for managing Permission Sets. The left sidebar includes sections for Hyperforce Assistant, Lightning Experience Transition Assistant, Users (with Permission Set Groups and Permission Sets selected), Feature Settings (Digital Experiences, Sales, Accounts, Salesforce Scheduler), and Scheduling Policies. The main content area is titled 'Permission Sets' and displays a table of existing permission sets. The table columns are Action, Permission Set Name, Description, and License. The table lists various permission sets such as 'Authenticated Payer', 'Buyer', 'Buyer Manager', 'C360 High Scale Flow Integration User', 'CRM User', 'Commerce Admin', 'Commerce Session', 'Contact Center Admin', 'Contact Center Agent', 'Contact Center Agent (Partner Telephony)', 'Contact Center Bring Your Own Channel User', 'Contact Center Supervisor', 'Contact Center Supervisor (Partner Telephony)', and 'Data Cloud Home Oro Integration User'. The 'Description' column provides a brief overview of the permissions granted by each set, and the 'License' column indicates the specific license required for each.

Creating permission set

1. Go to Setup Menu:

Log in to your Salesforce account.

Click on the gear icon in the upper right corner of the screen.

Select Setup from the dropdown menu.

2. Navigate to Permission Sets:

In the Quick Find box on the left side of the Setup screen, type Permission Sets.

Click on Permission Sets.

3. Create a New Permission Set:

Click on the New button to create a new permission set.

Label: Enter the label name as Per to Worker.

The API Name will be auto-populated.

Description	API Name	Namespace Prefix
Session Activation Required	Per_to_Worker	Vinay_Team
Permission Set Groups Added To	0	Vinay_Team, 05/03/2025, 3:11 pm
		Last Modified By

Apps

- Assigned Apps
- Assigned Connected Apps
- Object Settings
- App Permissions
- Apex Class Access
- Visualforce Page Access
- External Data Source Access

4. Configure Object Settings:

Under Apps, select Object Settings.

Click on the Item object.

Click on Edit.

5. Set Record Type Assignments:

Under Item: Record Type Assignments, enable Gold and Silver.

In the Object Permissions, check the boxes for Read, Edit, and Create.

Click on the Save button.

6. Manage Assignments:

After saving the permission set, click on Manage Assignments.

Click on the Add Assignment button.

7. Assign Users:

Select the users which you have created in the user milestone, using the Worker profile.

Click on Next.

Click on Assign.

Click on Done.

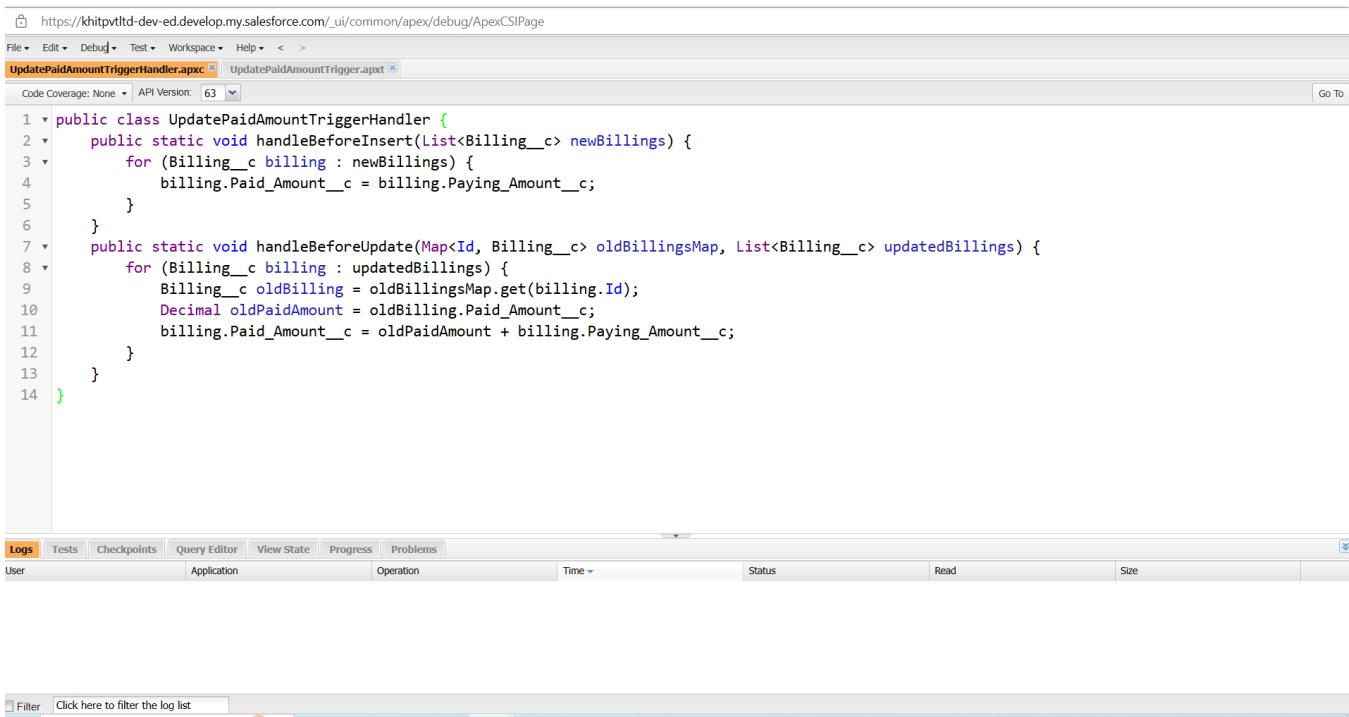
MODULE-12. Trigger

A trigger is a piece of Apex code that automatically runs before or after specific events, like record insertion, update, or deletion. Triggers are used to customise and automate actions in response to these events.

Create a Trigger Handler class

Trigger handler:

A trigger handler is a design pattern that organises trigger logic into separate classes. This helps in keeping code organised, reusable, and easier to maintain. The trigger handler class contains methods that handle the specific logic for different trigger events as it promotes modular coding practices and reduces the chances of code duplication.



The screenshot shows the Salesforce Apex code editor interface. The URL in the address bar is https://khttpvld-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The tab bar shows "UpdatePaidAmountTriggerHandler.apx" is the active file. The code editor displays the following Apex class:

```
1 public class UpdatePaidAmountTriggerHandler {
2     public static void handleBeforeInsert(List<Billing__c> newBillings) {
3         for (Billing__c billing : newBillings) {
4             billing.Paid_Amount__c = billing.Paying_Amount__c;
5         }
6     }
7     public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap, List<Billing__c> updatedBillings) {
8         for (Billing__c billing : updatedBillings) {
9             Billing__c oldBilling = oldBillingsMap.get(billing.Id);
10            Decimal oldPaidAmount = oldBilling.Paid_Amount__c;
11            billing.Paid_Amount__c = oldPaidAmount + billing.Paying_Amount__c;
12        }
13    }
14 }
```

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. The log table has columns for User, Application, Operation, Time, Status, and Read. A filter bar at the bottom says "Click here to filter the log list".

```

1 trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {
2     if (Trigger.isInsert) {
3         UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);
4     } else if (Trigger.isUpdate) {
5         UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap, Trigger.new);
6     }
7 }

```

The screenshot shows the Salesforce Developer Console interface. At the top, there's a navigation bar with links like File, Edit, Debug, Test, Workspace, Help, and a URL bar pointing to https://khitptltd-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. Below the navigation bar is a tabs section with "UpdatePaidAmountTriggerHandler.apxc" selected. Underneath the tabs, there's a "Code Coverage: None" and "API Version: 63" dropdown. The main area contains the Apex code shown above. At the bottom of the developer console, there's a logs tab and a table for monitoring application operations.

MODULE-13. Permission sets

A standard permission set consists of a group of common permissions for a particular feature associated with a permission set licence. Using a standard permission set saves you time and facilitates administration because you don't need to create the custom permission set.

Creating permission set

1. Go to Setup Menu:

Log in to your Salesforce account.

Click on the gear icon in the upper right corner of the screen.

Select Setup from the dropdown menu.

2. Navigate to Permission Sets:

In the Quick Find box on the left side of the Setup screen, type Permission Sets.

Click on Permission Sets.

3. Create a New Permission Set:

Click on the New button to create a new permission set.

Label: Enter the label name as Per to Worker.

The API Name will be auto-populated.

The screenshot shows the Salesforce Setup interface with the URL <https://khitptltd-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PsdM00000Bnvq6%3Fs%3DEntityPermissions%26o%3D01IdM000004VT8H>. The left sidebar shows various setup categories like Hyperforce Assistant, Lightning Experience Transition Assistant, Users, Feature Settings, and Sales. The main content area is titled 'Permission Sets' and shows a permission set named 'Per to Worker'. It includes sections for Tab Settings, Item: Record Type Assignments (listing Gold and Silver), and Object Permissions (listing Read, Create, Edit, Delete, and View All Records, all of which are checked).

4. Configure Object Settings:

Under Apps, select Object Settings.

Click on the Item object.

Click on Edit.

5. Set Record Type Assignments:

Under Item: Record Type Assignments, enable Gold and Silver.

In the Object Permissions, check the boxes for Read, Edit, and Create.

Click on the Save button.

6. Manage Assignments:

After saving the permission set, click on Manage Assignments.

Click on the Add Assignment button.

7. Assign Users:

Select the users which you have created in the user milestone, using the Worker profile.

Click on Next.

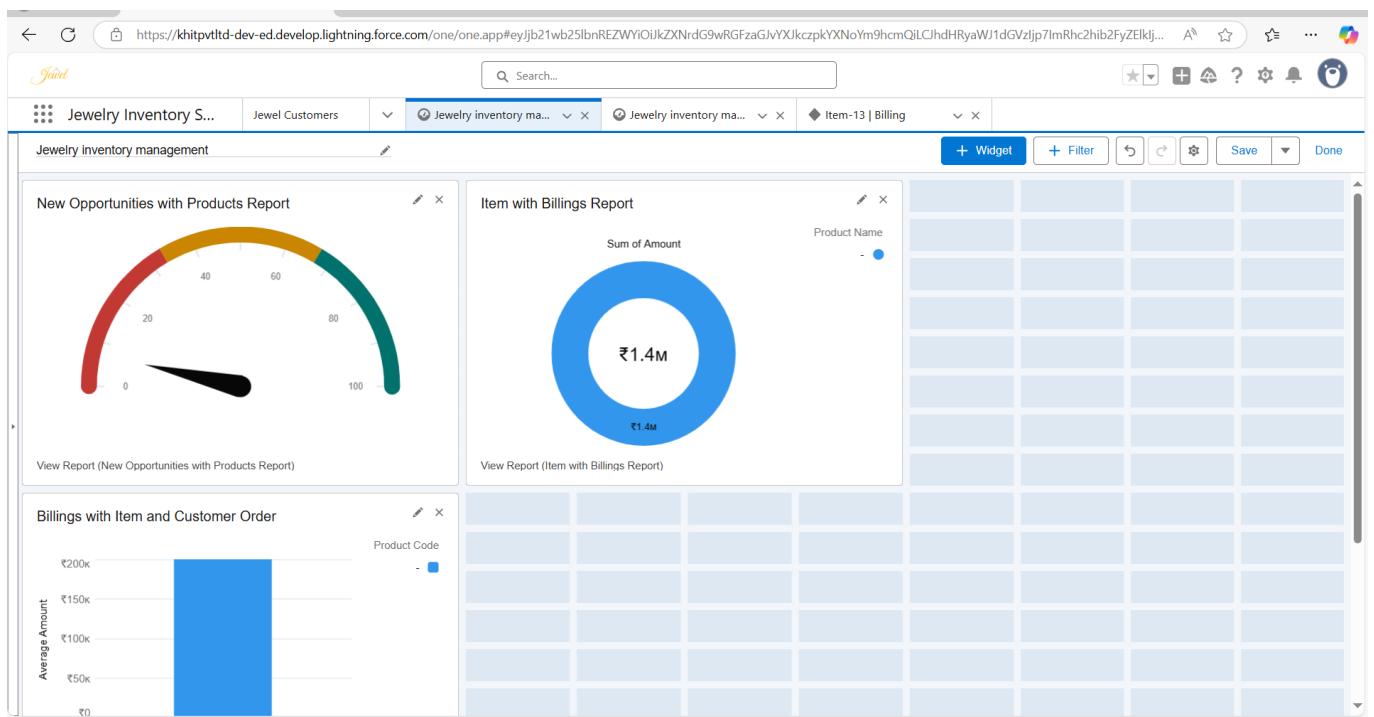
Click on Assign.

Click on Done.

MODULE-14. User Adoption

As a new Administrator, you perform user management tasks like creating and editing users, resetting passwords, granting permissions, configuring data access, and much more. In this unit, you will learn about users and how you add users to your Salesforce org.

Create a Record (Jewel Customer)



1. Open App Launcher:

Log in to your Salesforce account.

On the left side of the screen, click on the App Launcher icon.

2. Search for Jewellery Inventory System:

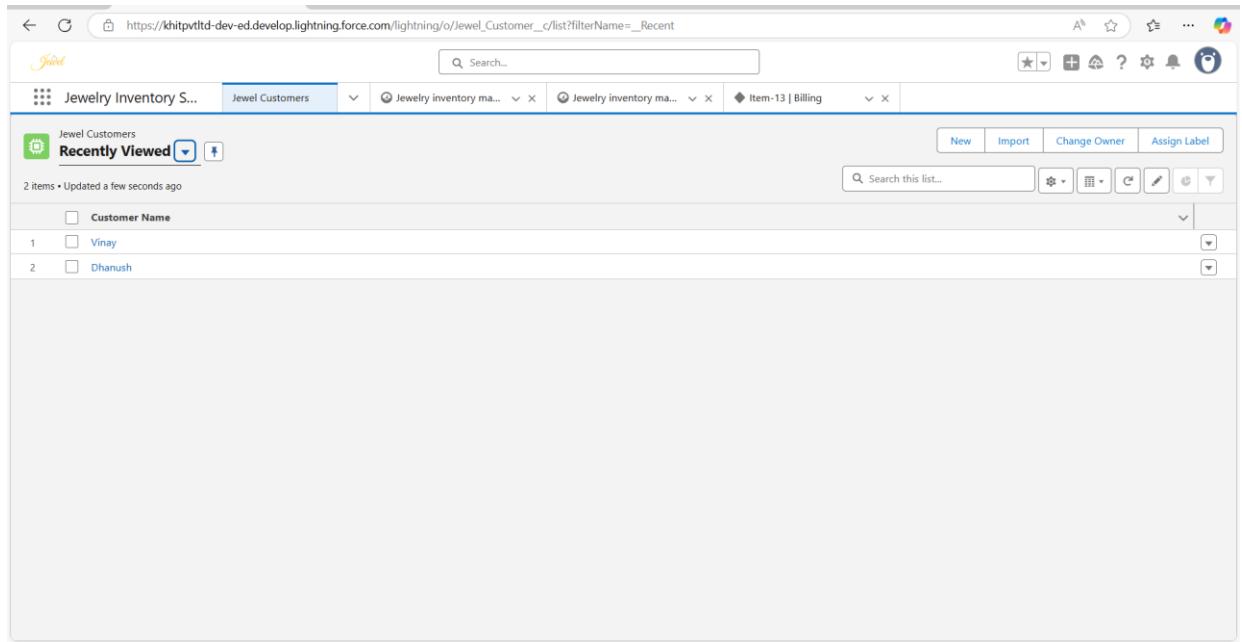
In the search bar within the App Launcher, type Jewellery Inventory System.

Click on the Jewellery Inventory System from the search results.

3. Navigate to Jewel Customer Tab:

Click on the dropdown menu within the Jewellery Inventory System.

Select the Jewel Customer tab from the dropdown menu.



4. Fill in the Required Details:

Enter all the required details for the new Jewel Customer.

Ensure that all mandatory fields are filled correctly.

5. Save the New Jewel Customer:

After filling in all the required details, click on the Save button to create the new Jewel Customer record.

Deleting a Jewel Customer Record in Salesforce Jewellery Inventory System

1. Open App Launcher:

Log in to your Salesforce account.

On the left side of the screen, click on the App Launcher icon.

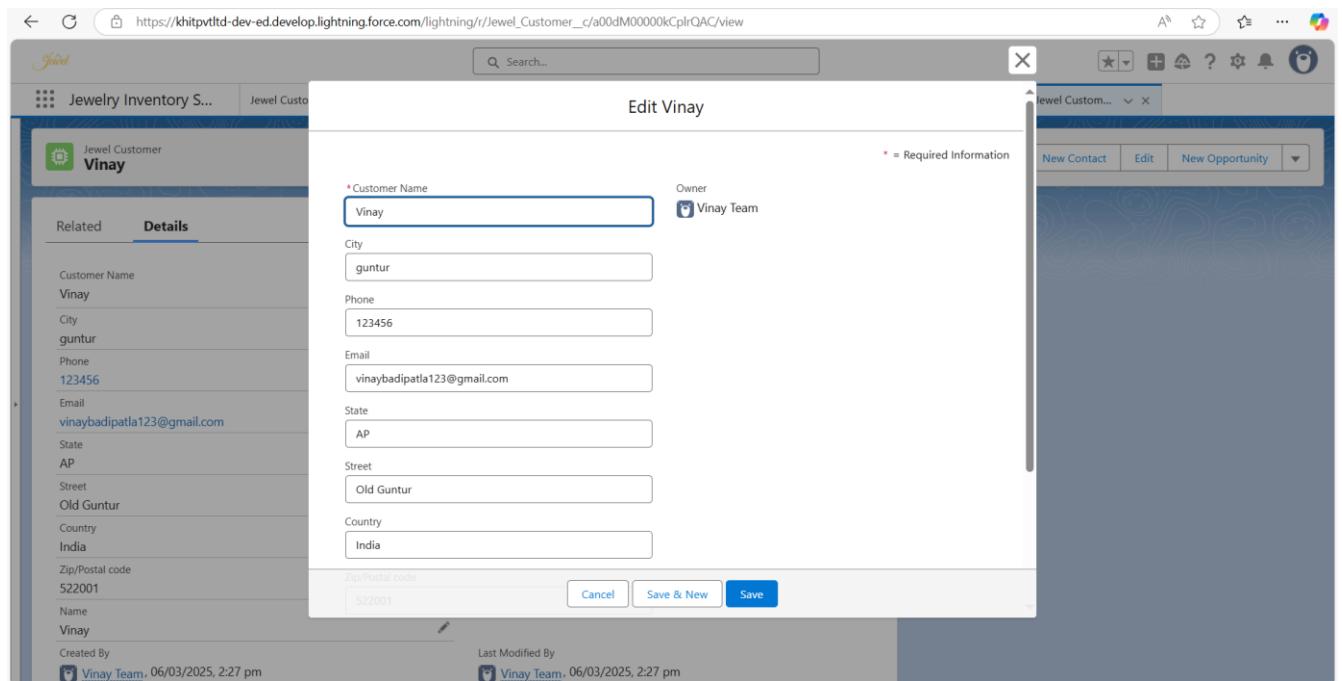
2. Search for Jewellery Inventory System:

In the search bar within the App Launcher, type Jewellery Inventory System.

Click on the Jewellery Inventory System from the search results.

3. Navigate to Jewel Customer Tab:

Click on the Jewel Customer tab within the Jewellery Inventory System.



3. Delete the Desired Jewel Customer Record:

Locate the record you want to delete.

Click on the arrow on the right-hand side of that particular record.

Select Delete from the dropdown menu.

Creating Multiple Records

To create at least 10 records for each of the following objects: Jewel Customer, Price, Item, Customer Order, and Billing, follow the steps below:

1. Open App Launcher:

Log in to your Salesforce account.

Click on the App Launcher icon.

2. Navigate to Each Object:

For each object (Jewel Customer, Price, Item, Customer Order, and Billing):

Search for the object name in the App Launcher.

Click on the object from the search results.

3. Create New Records:

For each object, click on the New button.

Click on the Save button.

MODULE-15. Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

Create Report

1. Go to the App:

Log in to your Salesforce account.

Navigate to the app where you want to create the report.

2. Navigate to Reports Tab:

Click on the Reports tab within the app.

The screenshot shows the Salesforce Reports tab interface. The top navigation bar includes links for Home, Reports, and various reports like 'Jewelry Inventory S...', 'Billings with Item and Customer Order', 'Item with Billings Report', and 'New Opportunities with Products Report'. The main area displays a table of recent reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed status. The 'Recent' section is currently selected. The sidebar on the left provides navigation links for Reports, Recent, Private Reports, Public Reports, All Reports, Folders, All Folders, and Favorites.

Report Name	Description	Folder	Created By	Created On	Subscribed
Billings with Item and Customer Order	Private Reports	Vinay Team	6/3/2025, 10:52 am		
Item with Billings Report	Private Reports	Vinay Team	6/3/2025, 10:46 am		
New Opportunities with Products Report	Private Reports	Vinay Team	6/3/2025, 11:05 am		

3. Create a New Report:

Click on the New Report button.

4. Select Report Type:

You can select the report type from the category list, the report type panel, or the search panel.

Click on Start Report to begin creating the report.

5. Customize Your Report:

Add fields from the left pane to your report as needed.

Drag and drop fields into the report layout.

Customize the report by adding filters, groupings, and summaries.

6. Save or Run the Report:

After customizing your report, you can either save it or run it.

Click on the Save button to save your report.

Click on the Run button to generate the report and view the results.

MODULE-16. Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

The screenshot shows the Salesforce Lightning interface with the URL <https://khttpvtltd-dev-ed.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru>. The top navigation bar includes a back button, forward button, search bar, and various icons. The main content area is titled 'Dashboards' and shows a table of recent dashboards. The table has columns for Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. Two entries are visible:

Dashboards	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Jewelry inventory management		Private Dashboards	Vinay Team	6/3/2025, 2:53 pm	<input type="checkbox"/>
Created by Me	Jewelry management		Private Dashboards	Vinay Team	6/3/2025, 2:48 pm	<input type="checkbox"/>

On the left sidebar, there are sections for Dashboards (Recent, Created by Me, Private Dashboards, All Dashboards), Folders (All Folders, Created by Me, Shared with Me), and Favorites (All Favorites).

Create Dashboard

1. Go to the App:

Log in to your Salesforce account.

Navigate to the app where you want to create the dashboard.

2. Navigate to Dashboards Tab:

Click on the Dashboards tab within the app.

3. Create a New Dashboard:

Click on the New Dashboard button.

Enter a name for the dashboard.

Click on the Create button.

4. Add a Component:

Click on the Add Component button.

5. Select a Report:

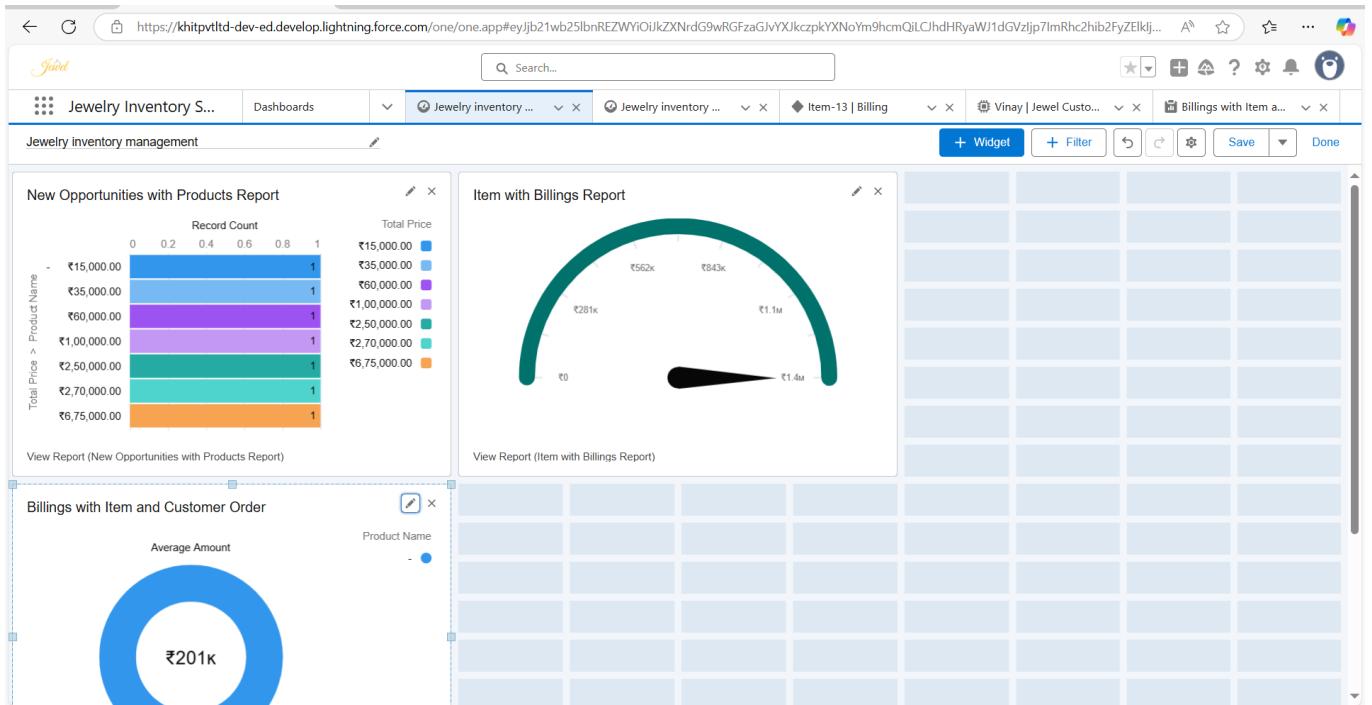
Choose the report you want to use for the dashboard component.

Click on Select.

6. Configure the Component:

Customize the component settings as needed.

Click on Add to add the component to the dashboard.



7. Save and Finish:

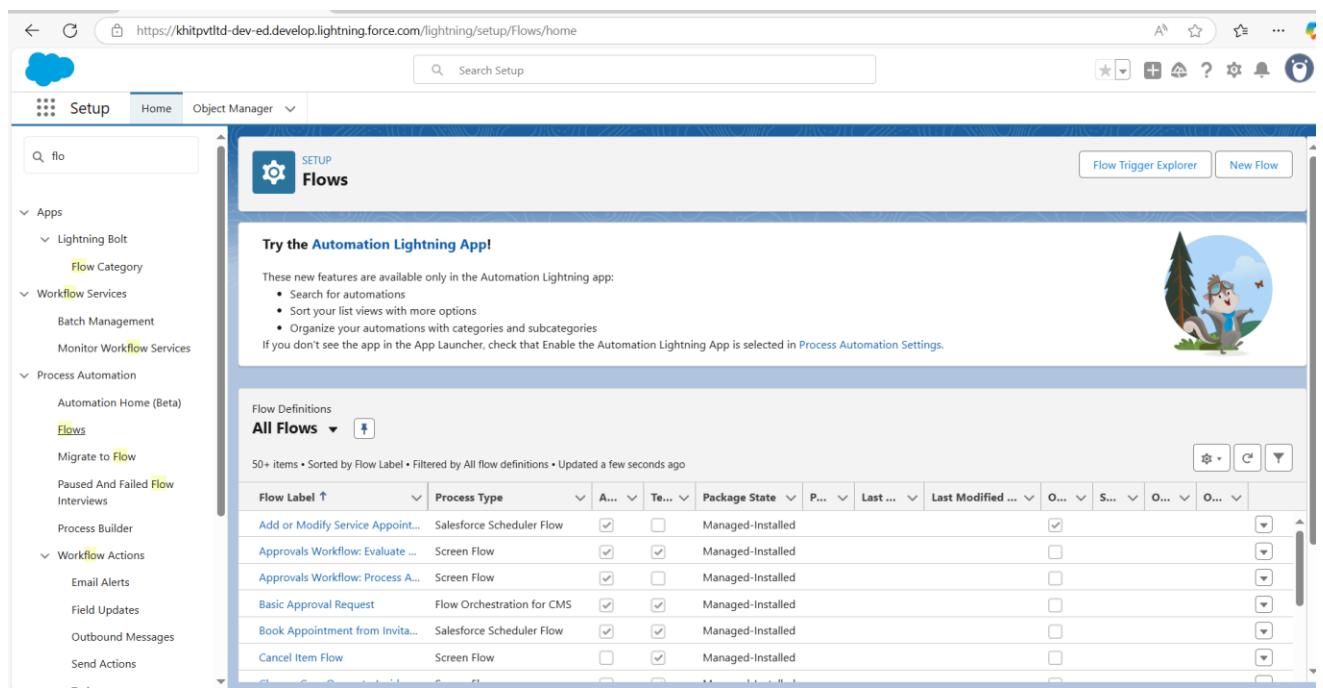
Click on the Save button to save the dashboard.

Click on the Done button to complete the setup.

MODULE-17. Flows

In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps.

Flows are built using a visual interface and can be created without any coding knowledge.



The screenshot shows the Salesforce Setup interface for the Flows section. The left sidebar contains navigation links for Apps (Lightning Bolt, Workflow Services, Process Automation), Flow Category, and Flows. The main content area is titled "Flows" and features a "Try the Automation Lightning App!" section with a cartoon character. Below this is a "Flow Definitions" table with columns for Flow Label, Process Type, Package State, and Last Modified. The table lists several flows, including "Add or Modify Service Appointment", "Approvals Workflow: Evaluate", "Approvals Workflow: Process A...", "Basic Approval Request", "Book Appointment from Invita...", and "Cancel Item Flow".

Flow Label	Process Type	Package State
Add or Modify Service Appointment	Salesforce Scheduler Flow	Managed-Installed
Approvals Workflow: Evaluate	Screen Flow	Managed-Installed
Approvals Workflow: Process A...	Screen Flow	Managed-Installed
Basic Approval Request	Flow Orchestration for CMS	Managed-Installed
Book Appointment from Invita...	Salesforce Scheduler Flow	Managed-Installed
Cancel Item Flow	Screen Flow	Managed-Installed

Create a Flow

1. Go to Setup Menu:

Log in to your Salesforce account.

Click on the gear icon in the upper right corner of the screen.

Select Setup from the dropdown menu.

2. Navigate to Flow:

In the Quick Find box on the left side of the Setup screen, type Flow.

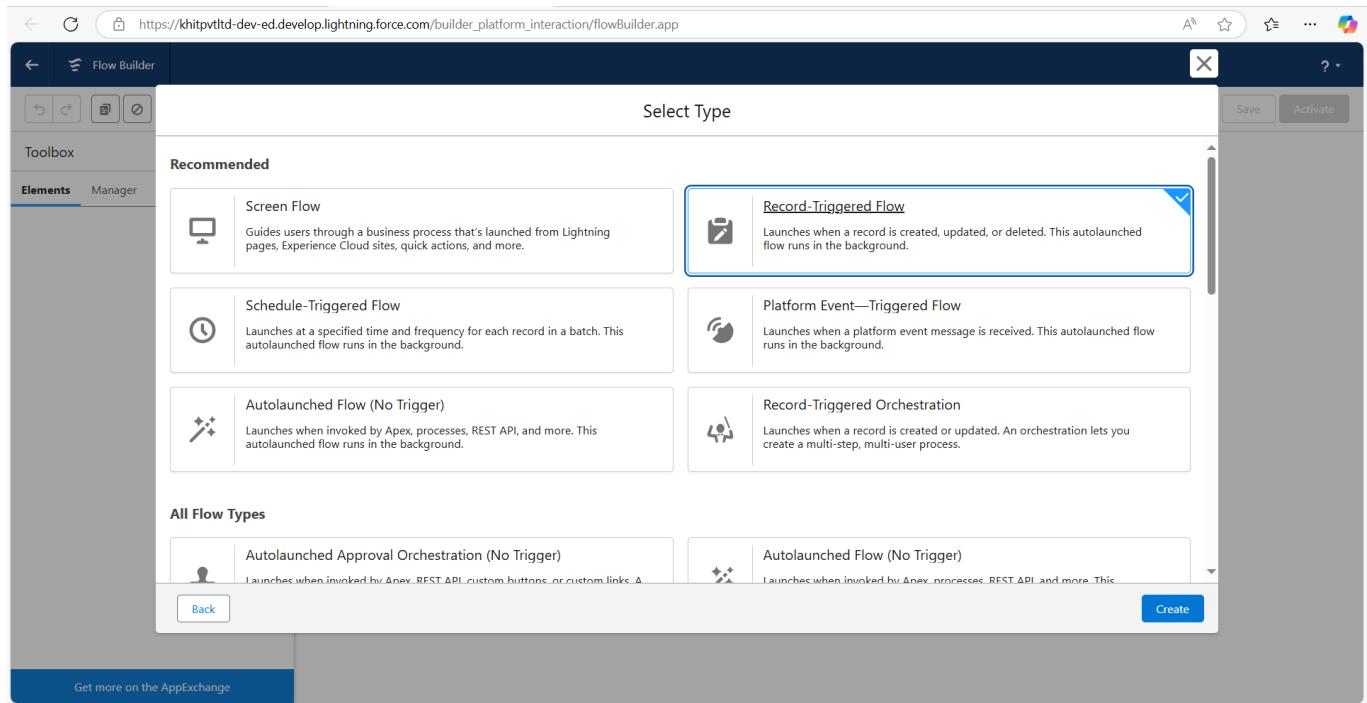
Click on Flows.

Click on the New Flow button.

3. Create a Record-triggered Flow:

Select Record-triggered Flow.

Click on Create.



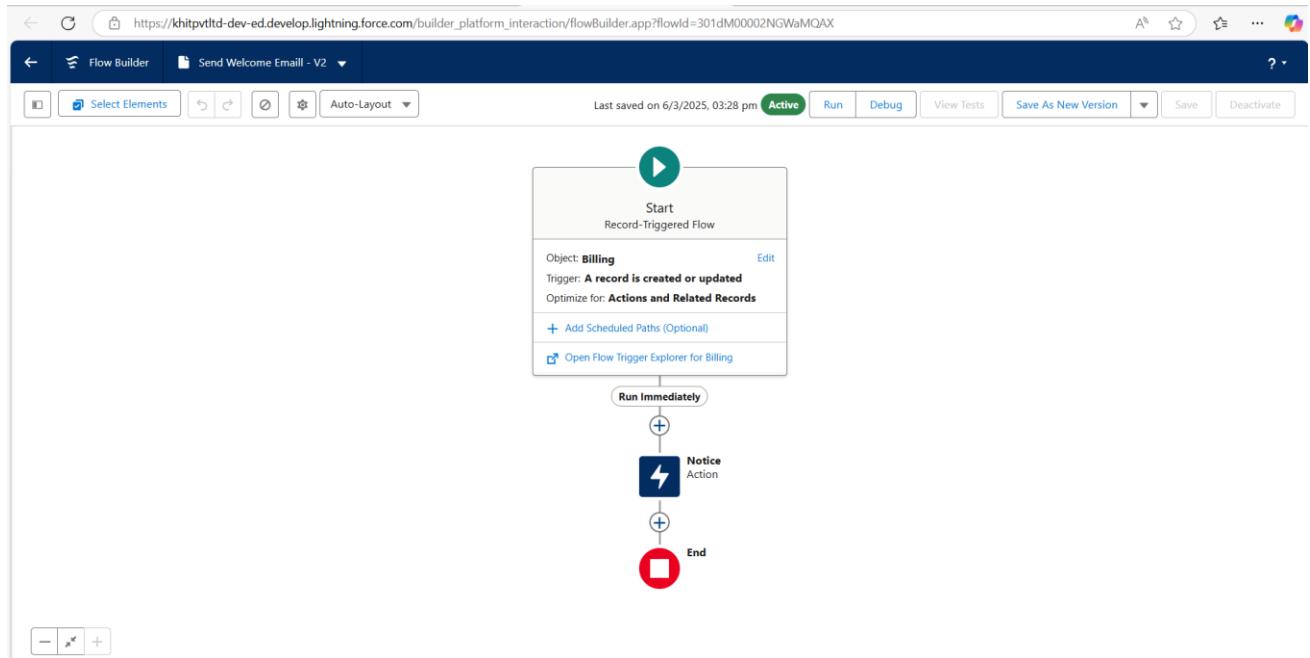
4. Select Object and Trigger:

Select the object Billing from the dropdown list.

Select the trigger When a record is created or updated.

Optimize the flow for Actions and Related Records.

Click on Done.



5. Switch to Free-form Mode:

Change the mode from Auto-layout to Free-form.

6. Create a New Resource:

In the toolbox, click on Manager.

Click on New Resource.

Select the resource type as Text Template.

The screenshot shows the Flow Builder interface in "Free-Form" mode. The flow structure is identical to the one in Auto-layout mode, starting with a "Start" record-triggered flow step, followed by a "Run Immediately" connector, a "Notice Action" step, and an "End" connector.

7. Configure Text Template:

Enter the API name as email body.

Change the view to Rich Text and then to Plain Text.

In the body field, paste the following syntax:

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 }

Click on Done.

8. Add Action Element:

Click on Elements.

Drag the Action element into the preview pane.

In the action bar, search for Send Email and click on it.

9. Configure Action Element:

Give the label name as Notice.

The API name will be auto-populated.

Enable the body in Set Input Values for the Selected Action.

Select the text template that was created.

10. Configure the Email Action:

Drag and drop the Action Element onto the Flow canvas.

Select the action type as "Send Email" or similar action based on your Salesforce version and configuration.

In the action configuration, specify the following:

Recipient Address:

Use the merge field { !\$Record.Item_r.Customer_Namer.Email_c } to dynamically pull the customer's email address.

Subject Line:

Enter the subject as "Welcome to Jewellery Inventory System".

Body of Email (optional):

You can further customize the body of the email with any additional message or dynamic data.

11. Connect the Start to the Action Element:

Drag a path from the Start element to the Action Element in the Flow Builder.

12. Save and Activate the Flow:

After configuring all necessary elements, click Save.

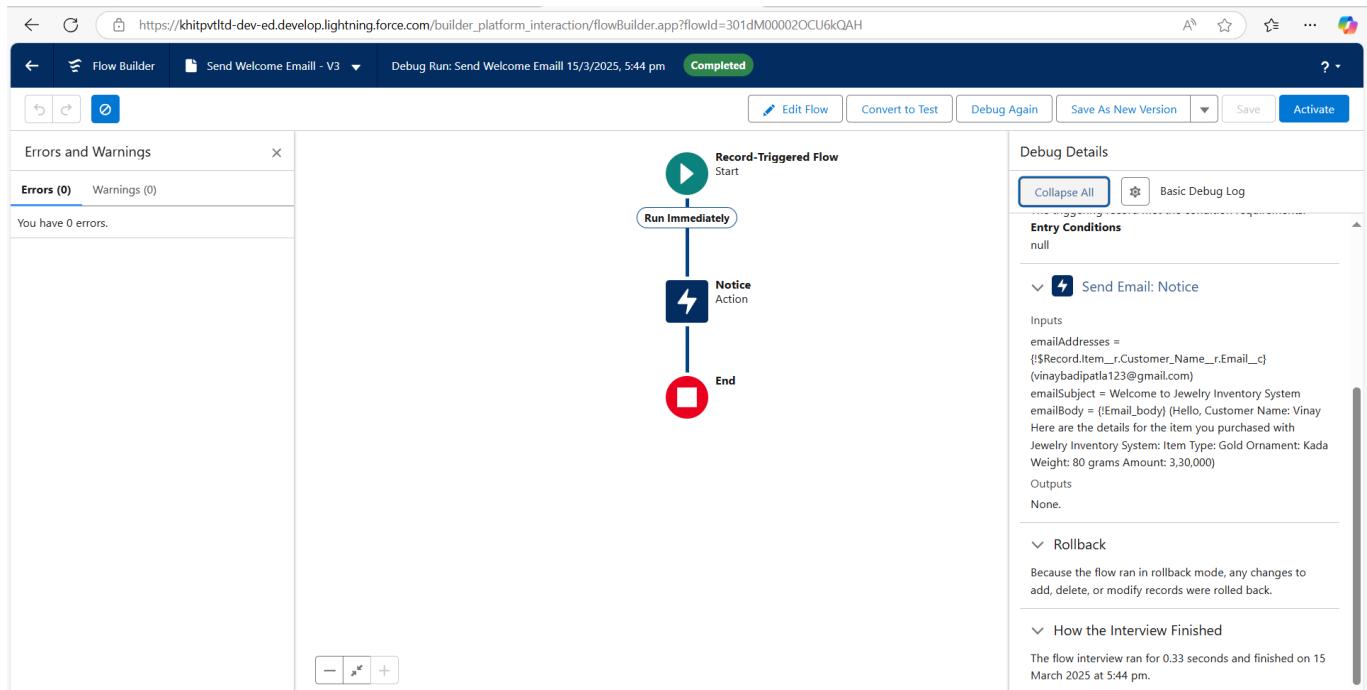
Upon saving, Salesforce will automatically populate the Flow Label and Flow API Name.

Click Save to save the Flow.

Click Activate to activate the Flow.

13. Test the Flow:

Run a test to ensure that the customer receives the email with the correct subject and email address.



Outcomes

The implementation of the CRM Application for Jewel Management has delivered significant benefits and improvements for jewelry businesses. The key outcomes of this project include:

1. Enhanced Customer Relationship Management

Improved Customer Satisfaction: The application enables personalized services and targeted marketing efforts, fostering customer loyalty and satisfaction.

Comprehensive Customer Records: Maintains accurate records of customer interactions, purchase history, and preferences, allowing for better customer engagement.

2. Optimized Inventory Management

Real-Time Inventory Updates: Provides real-time updates on inventory levels, preventing stockouts and overstocking, ensuring optimal stock levels.

Efficient Stock Management: Facilitates efficient tracking and control of inventory across multiple locations, reducing inventory carrying costs and losses.

3. Streamlined Sales Processes

Automation of Sales Workflows: Automates sales workflows, reducing manual efforts and increasing sales efficiency.

Seamless Transactions: Enables staff to process purchases, returns, and exchanges with ease, ensuring a smooth sales process.

4. Data-Driven Decision Making

Insightful Reporting: Generates detailed reports and dashboards that provide a clear visualization of key business metrics such as sales performance, inventory levels, and customer behavior.

Informed Business Strategies: Allows for informed decision-making based on accurate data, leading to better business strategies and growth opportunities.

5. Improved User Experience

Intuitive Interface: Offers a user-friendly interface, making it easy for staff to navigate and use the system effectively.

Customizability: Allows for customizable fields, tabs, and page layouts to meet the specific needs of the jewelry business.

6. Increased Operational Efficiency

Reduction in Manual Processes: Reduces manual processes and paperwork, leading to increased productivity and efficiency.

Optimized Business Operations: Streamlines and optimizes business operations, resulting in cost savings and improved profitability.

7. Scalability and Flexibility

Scalable Solution: Provides a scalable solution that can grow with the business, accommodating increasing inventory and customer base.

Flexible Customization: Offers flexibility and customization, allowing for future enhancements and integrations with other systems.

By leveraging the CRM Application for Jewel Management, jewelry businesses have experienced substantial improvements in their operations, customer relationships, and overall business performance. This Salesforce-based solution has proven to be a valuable asset, providing a competitive edge and setting the stage for sustained success in the market.

Challenges and Solutions

Challenge 1: Complex Inventory Management

Description: Managing a diverse inventory of jewelry items with varying attributes (e.g., material, size, design) posed a significant challenge. Ensuring accurate tracking and control of inventory across multiple locations was critical.

Solution: Implemented a robust inventory management module that provides real-time updates on stock levels and facilitates efficient tracking of items. Customizable attributes were added to categorize and manage different types of jewelry accurately.

Challenge 2: Integration with Legacy Systems

Description: Integrating the new CRM application with existing legacy systems used by jewelry businesses was a complex task. Ensuring seamless data migration and interoperability was essential to avoid disruptions.

Solution: Developed custom integration tools and APIs to facilitate smooth data migration and communication between the CRM application and legacy systems. Thorough testing was conducted to ensure data integrity and seamless integration.

Challenge 3: User Adoption and Training

Description: Ensuring that staff members adopted the new CRM application and effectively used its features was a critical challenge. Resistance to change and lack of familiarity with new technology needed to be addressed.

Solution: Conducted comprehensive training sessions and workshops to educate staff on using the CRM application. Created user-friendly documentation and guides to assist users in navigating the system. Provided ongoing support to address any issues or questions.

Challenge 4: Scalability and Performance

Description: Designing a scalable solution that could handle the growing inventory and customer base of jewelry businesses was essential. Ensuring the application's performance under high load conditions was also a challenge.

Solution: Architected the application with scalability in mind, utilizing Salesforce's robust infrastructure and cloud capabilities. Implemented performance optimization techniques to ensure the application could handle high volumes of data and users efficiently.

Challenge 5: Customization and Flexibility

Description: Jewelry businesses have unique requirements and processes, necessitating a high degree of customization and flexibility in the CRM application. Addressing these diverse needs without compromising the system's integrity was challenging.

Solution: Developed a flexible and customizable application framework that allows businesses to tailor fields, tabs, and page layouts to their specific needs. Provided a range of configuration options to accommodate different business processes and workflows.

Challenge 6: Security and Compliance

Description: Ensuring the security of sensitive customer and inventory data was paramount. Compliance with industry regulations and data protection standards was also necessary.

Solution: Implemented robust security measures, including encryption, access controls, and regular security audits. Ensured compliance with relevant industry regulations and data protection standards to safeguard sensitive information.

Future Recommendations

To ensure the continued success and evolution of the CRM Application for Jewel Management, the following recommendations are suggested for future development and enhancement:

1. Enhanced Mobile Accessibility

Mobile App Development: Develop a mobile version of the CRM application to provide staff with on-the-go access to key features and functionalities. This will enhance flexibility and productivity, especially for sales representatives and managers.

Responsive Design: Ensure that the CRM application is fully optimized for mobile devices, providing a seamless user experience across different screen sizes and platforms.

2. Integration with E-commerce Platforms

E-commerce Integration: Integrate the CRM application with popular e-commerce platforms to streamline online sales processes and synchronize inventory levels. This will enable jewelry businesses to manage both online and offline sales more efficiently.

Omnichannel Support: Provide support for omnichannel retail strategies, allowing customers to have a consistent shopping experience across various channels, including online stores, physical stores, and social media.

3. Enhanced Security and Data Protection

Advanced Security Measures: Continuously update and enhance security measures to protect sensitive customer and business data. Implement advanced encryption, multi-factor authentication, and regular security audits.

Compliance with Regulations: Ensure compliance with evolving data protection regulations and industry standards to maintain trust and credibility with customers.

4. Customer Self-Service Portal

Self-Service Portal: Develop a customer self-service portal that allows customers to access their purchase history, track orders, and manage their preferences. This will enhance customer satisfaction and reduce the workload on customer support teams.

Chatbot Integration: Integrate AI-powered chatbots to provide instant support and assistance to customers, addressing their queries and concerns in real-time.

5. Continuous User Training and Support

Ongoing Training Programs: Implement continuous training programs to keep staff updated on new features and best practices for using the CRM application. This will ensure effective utilization and maximize the benefits of the system.

Dedicated Support Team: Establish a dedicated support team to provide ongoing assistance and address any issues or questions that arise. Regular feedback sessions can help identify areas for improvement.

6. Customization and Flexibility

Customizable Modules: Offer customizable modules and features that allow businesses to tailor the CRM application to their specific needs and workflows. This will ensure the system remains relevant and adaptable to changing business requirements.

Third-Party Integrations: Provide seamless integration with third-party applications and tools, enabling businesses to extend the functionality of the CRM application and create a unified ecosystem.

By implementing these future recommendations, the CRM Application for Jewel Management can continue to evolve and meet the dynamic needs of jewelry businesses, ensuring sustained success and a competitive edge in the market.

Conclusion

The CRM Application for Jewel Management represents a significant advancement in the way jewelry businesses manage their operations, customer relationships, and inventory. By leveraging the powerful capabilities of Salesforce, this comprehensive solution addresses the unique challenges faced by the jewelry industry and provides a platform for sustained success.

The application offers a range of features that enhance customer satisfaction, optimize inventory management, streamline sales processes, and enable data-driven decision-making. With its intuitive and user-friendly interface, jewelry businesses can effortlessly navigate and utilize the system, resulting in increased productivity and efficiency.

Throughout the development process, careful consideration was given to the specific needs of jewelry businesses, ensuring that the application is both customizable and scalable. This flexibility allows businesses to tailor the system to their unique requirements and accommodate future growth and changes.

The successful implementation of the CRM Application for Jewel Management has yielded numerous benefits, including improved customer relationships, efficient inventory management, and enhanced operational efficiency. By continuously evolving and integrating advanced technologies, the application will remain a valuable asset for jewelry businesses, providing a competitive edge in the market.

As the jewelry industry continues to evolve, this CRM application will serve as a cornerstone for innovation and excellence, empowering businesses to achieve their goals and thrive in an ever-changing landscape. With its robust features, seamless integration, and future-ready design, the CRM Application for Jewel Management sets the stage for a new era of success and growth in the jewelry business.

THANK YOU