

CRM Application for Jewel Management

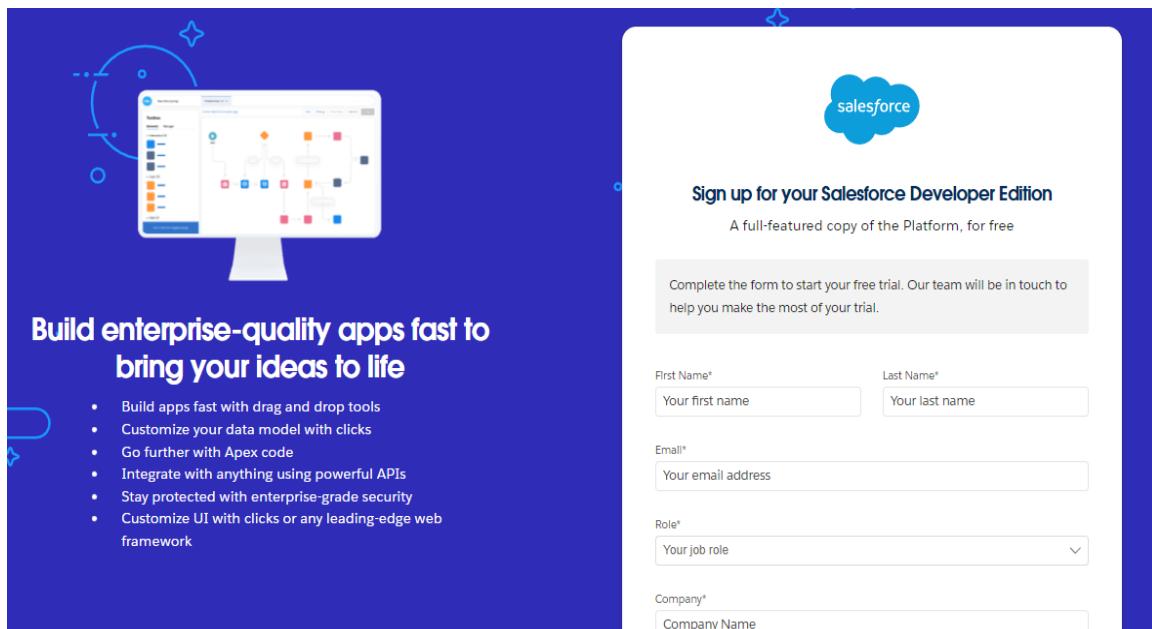
Description :

The CRM Application for Gem The executives (Administrator) in Salesforce is a complete arrangement custom-made for adornments organizations to really smooth out their tasks more. This application permits directors to have full command over the stage, permitting you to regulate all that from stock and client information to deals, exchanges, and administrations. Administrators can oversee client profiles, keeping records of inclinations, buy history interchanges, empowering more customized services. Administrators can likewise modify the framework to meet explicit business needs, relegate jobs and authorizations to staff, and make visual reports through dashboards to follow deals execution and patterns. This concentrated device works on functional efficiency, ensures consumer loyalty, and drives development, making it an optimal answer for organizations in the adornments area.

Task 1: Salesforce Account.

1.1: Creating Developer Account:

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :



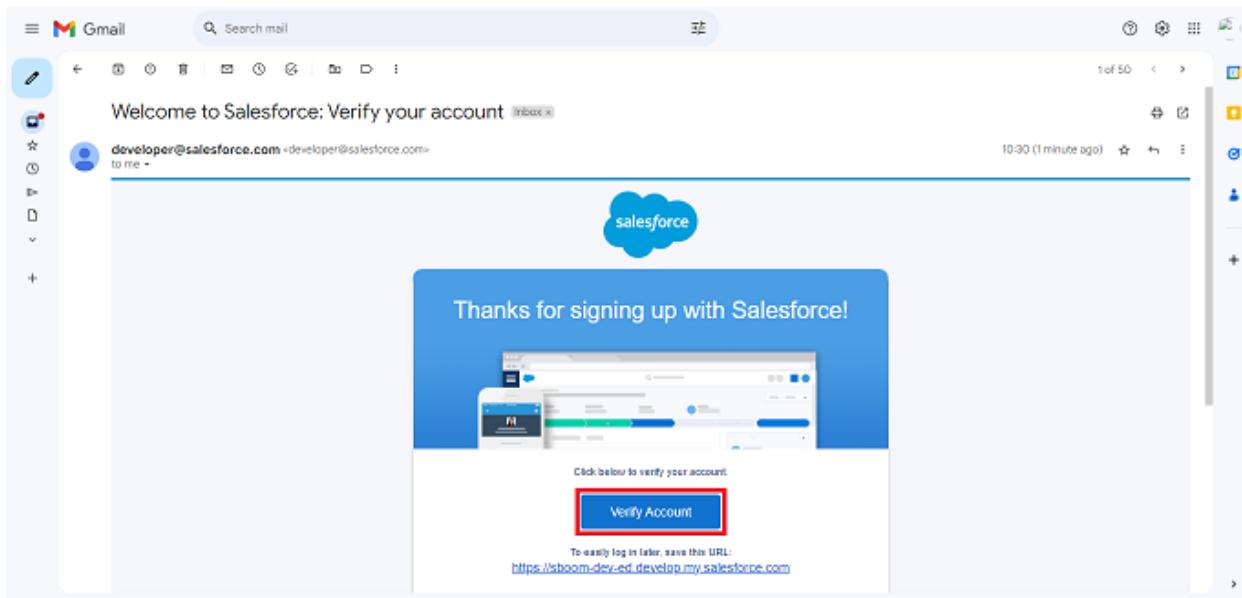
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

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

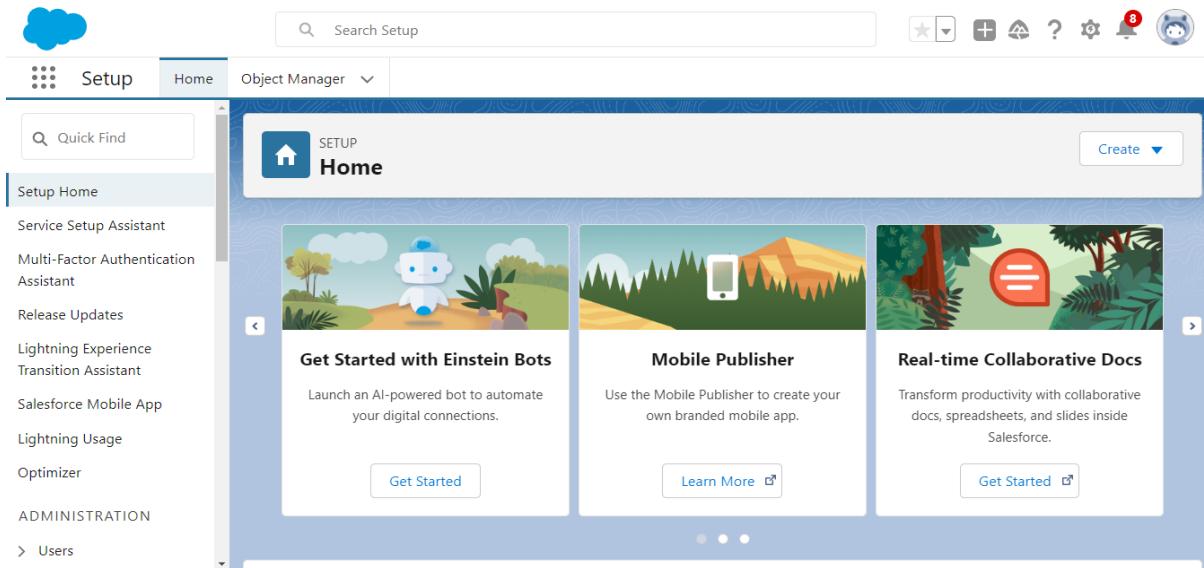
Click on sign me up after filling these.

1.2 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 5-10 mins.



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.
4. Then you will redirect to your salesforce setup page.



Task 2: Creating Object.

2.1 Create Jewel Customer Object:

The purpose of creating a Jewel Customer custom object is to store and manage information about Customer.

To create an object:

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



1. Enter the label name >> Jewel Customer
2. Plural label name >> Jewel Customers
3. Enter Record Name, Label, and Format
 - Record Name --> Customer name
 - Data Type --> Text
4. Click on Allow reports.
5. Allow search --> Save.

2.2 Create Item Object:

The purpose of creating an Item object is to manage the inventory of gold and silver items.

To create an object:

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

Note:Create three more objects with label names as Customer Order,Price, and Billing.
(Use “Auto Number” as a data type for Customer Order,Price and Billing).

Task 3: Tabs.

3.1 Creating a Custom Tab:

To create a Tab:(Customer)

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

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external content, such as links to external websites. Lightning Component tabs allow you to embed Lightning components to the navigation bar. Lightning Pages tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

The screenshot shows the 'Custom Object Tabs' page in the Salesforce setup. At the top, there is a header with the title 'Custom Object Tabs' and two buttons: 'New' (which is highlighted with a red border) and 'What Is This?'. Below the header, a message states 'No Custom Object Tabs have been defined'. The page has a light gray background with a thin blue horizontal line separating the header from the main content area.

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

3.2 To create a Tab:(Item)

- Go to the setup page >> type Tabs in the 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.

Note: Now create tabs for Customer Order, Price, and Billing objects.

Task 4: Lighting App.

Create a Lightning App

To create a lightning app page:

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

App Name	Developer Name	Description	Last Modified	App Type
All Tabs	ArTabSet		04/12/2022, 10:13 am	Classic
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic
App Launcher	AppLauncher	App Launcher tabs	04/12/2022, 10:13 am	Classic
Bar Solutions	LightningBar	Discover and manage business solutions designed for your industry	04/12/2022, 10:18 am	Lightning
Chatter Desktop	Chatter/Desktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected to their social network from their desktop	29/12/2022, 4:04 pm	Connected (Managed)
Chatter Mobile for BlackBerry	ChatterForBlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view feed items, send messages, and more	29/12/2022, 4:05 pm	Connected (Managed)
College Management System	Nadeem	demo app	08/12/2022, 4:18 pm	Lightning
Community	Community	Salesforce CRM Communities	04/12/2022, 10:13 am	Classic
Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes	04/12/2022, 10:13 am	Lightning

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

App Name : Jewelry Inventory System.

Developer Name : This will be auto populated

Description : Elevate your look with elegance

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

Primary color hex value : keep this default.

New Lightning App

App Details

* App Name

* Developer Name

Description

App Branding

Image

Primary Color Hex Value

Upload

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

App Launcher Preview

Jewelry Inventory System
Elevate your look with elegance

Next

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

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

Navigation Rules

User Profiles

App Options

Navigation and Form Factor

* Navigation Style Standard navigation Console navigation (highlighted with a red arrow)

* Supported Form Factors Desktop and phone Desktop Phone (highlighted with a red arrow)

Setup and Personalization

Setup Experience

Setup (full set of Setup options) Service Setup

App Personalization Settings

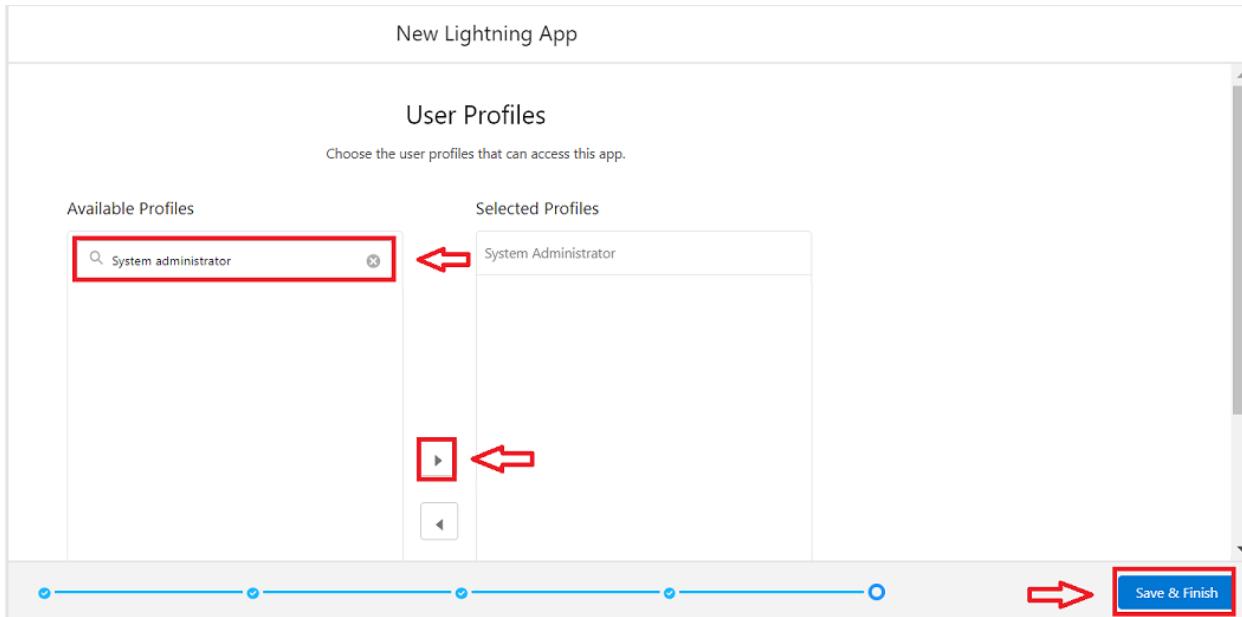
Disable end user personalization of nav items in this app

Clear workspace tabs for each new console session

4. (Utility Items) keep it as default>>Next.
5. To Add Navigation Items: Search for the item in the (JewelCustomer, Item, CustomerOrder, Price, Billing, Reports, Dashboard) from the search bar and move it using the arrow button>>Next>>Next.

The screenshot shows the 'Navigation Items' configuration screen in the Lightning App Builder. The 'Available Items' list includes: Accounts, Alert Settings, All Sites, Alternative Payment Methods, App Launcher, Appointment Invitations, Approval Requests, Asset Action Sources, Asset Actions, Asset Services, Jewel Customers, Items, Customer Orders, Prices, Billings, Reports, and Dashboards. The 'Selected Items' list contains: Jewel Customers, Items, Customer Orders, Prices, Billings, Reports, and Dashboards. A sidebar on the left shows navigation items like App Details & Branding, App Options, Utility Items (Desktop Only), Navigation Rules, and User Profiles.

6. To Add User Profiles:
- Search profiles (System administrator) in the search bar>>click on the arrow button>>save & finish.



Task 5: Fields.

5.1 Creating Lookup Relationship:

A Lookup relationship is a type of relationship in Salesforce that connects two objects together based on a field known as the Lookup field. It establishes a relationship between a child object and a parent object, allowing the child object to reference the parent object.

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

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

5.2 Creating a Master-Detail Relationship:

Master-detail relationship is a type of relationship between two objects where the master object controls certain behaviors and settings of the detail object. Here are a

few use cases that demonstrate the use of master-detail relationships.

Creating Master-Detail Relationship between Item & Customer Order Object.

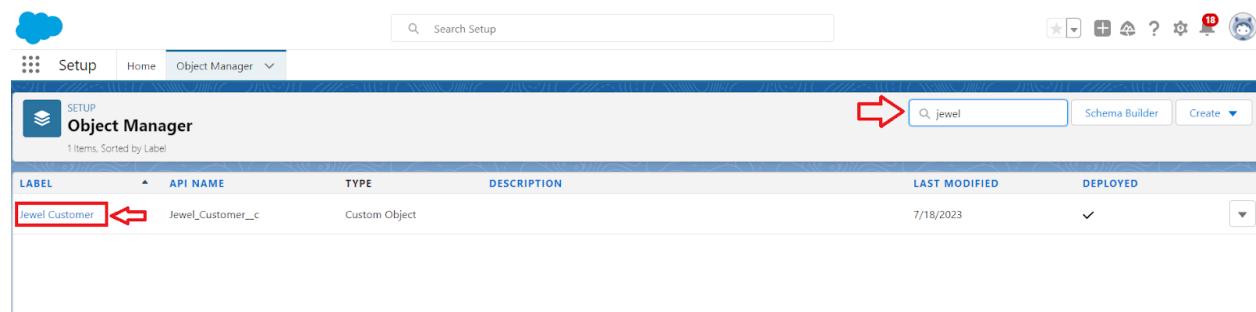
To Create a Master-Detail relationship:

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

5.3 Creating Text Field in Jewel Customer Object:

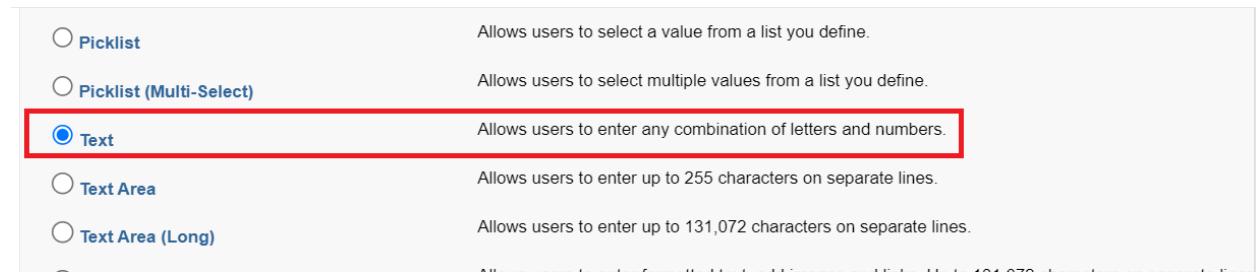
To create fields in an object:

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



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below it is a search bar containing 'jewel'. A red arrow points from the text 'Jewel Customer' in the question to the 'jewel' search term in the search bar. The main area displays a table with one row for 'Jewel Customer'. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The 'LABEL' column shows 'Jewel Customer' with a red box around it and a red arrow pointing to it. The 'API NAME' column shows 'Jewel_Customer__c'. The 'TYPE' column shows 'Custom Object'. The 'DESCRIPTION' column is empty. The 'LAST MODIFIED' column shows '7/18/2023'. The 'DEPLOYED' column has a dropdown arrow. The entire table is enclosed in a red border.

2. Now click on “Fields & Relationships” ? New
3. Select Data type as “Text”.

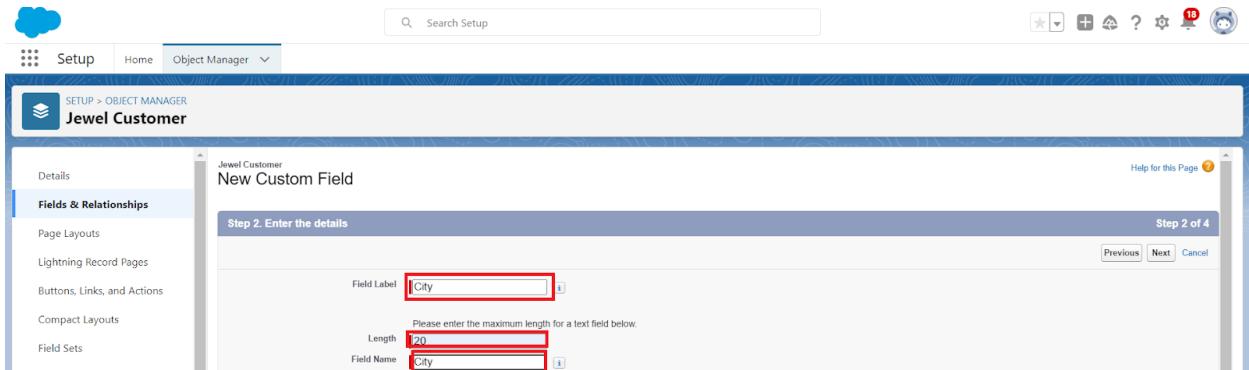


The screenshot shows a list of data types in the Salesforce setup. The 'Text' option is highlighted with a red box and a red arrow pointing to it. Other options include 'Picklist', 'Picklist (Multi-Select)', 'Text Area', and 'Text Area (Long)'. Each option has a brief description to its right.

<input type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input checked="" type="radio"/> Text	Allows users to enter any combination of letters and numbers.
<input type="radio"/> Text Area	Allows users to enter up to 255 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.

4. Click on Next
5. Fill the above as following:

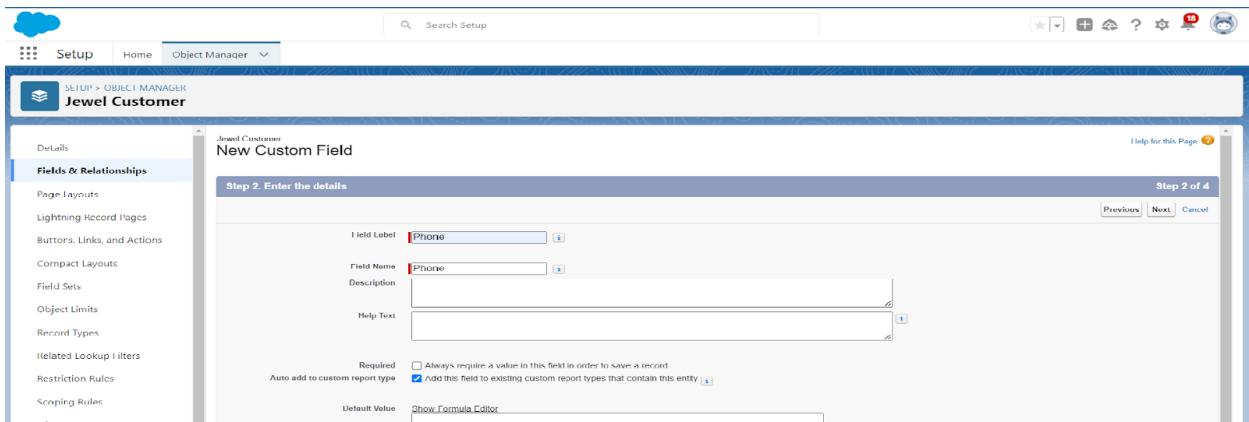
- Field Label: City
- Length : 20
- Field Name : gets auto generated
- Click on Next >> Next >> Save and new.



5.4 Creating the Phone field in object Jewel Customer:

To create fields in an object:

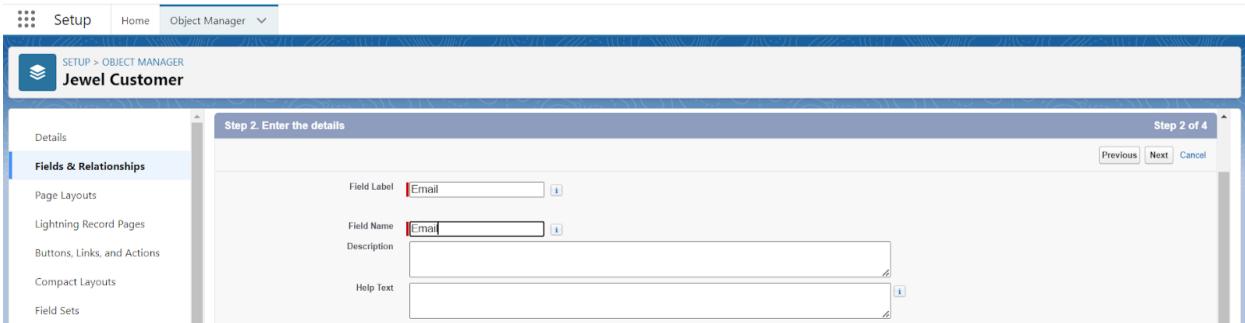
1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Phone” and click Next.
4. Given the Field Label as “ Phone”.
5. Field Name will be auto populated, and click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



5.5 Creating the Email field in object Jewel Customer:

To create fields in an object:

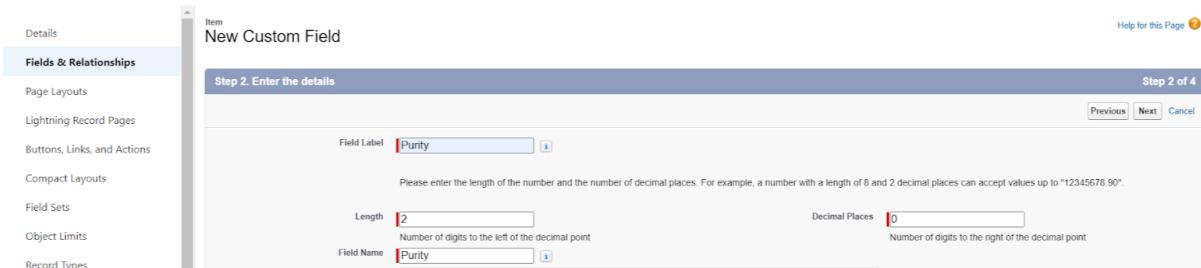
1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar>> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Email” and click Next.
4. Given the Field Label as “ Email”.
5. Field Name will be auto populated, and click on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



5.6 Creating the number field in Item object:

To create fields in an object:

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



5.7 Creating Picklist Field in Item Object:

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.

3. Select Data type as “Picklist” and click Next.
4. Enter Field Label as “Item Type”.
5. In values select “Enter values(Gold,Silver), with each value separated by a new line” and enter values as shown below.
6. Click Next > Next > Next > Save .

The screenshot shows the 'New Custom Field' setup page in Salesforce. The left sidebar has 'Fields & Relationships' selected. The main area is titled 'Step 2. Enter the details'. It shows the 'Field Label' as 'Item Type', 'Values' containing 'Gold' and 'Silver' (with the 'Enter values, with each value separated by a new line' option selected), and 'Field Name' as 'Item_Type'. There are also checkboxes for 'Display values alphabetically, not in the order entered', 'Use first value as default value', and 'Restrict picklist to the values defined in the value set' (which is checked).

5.8 Creating Currency Field in Price Object:

To create fields in an object:

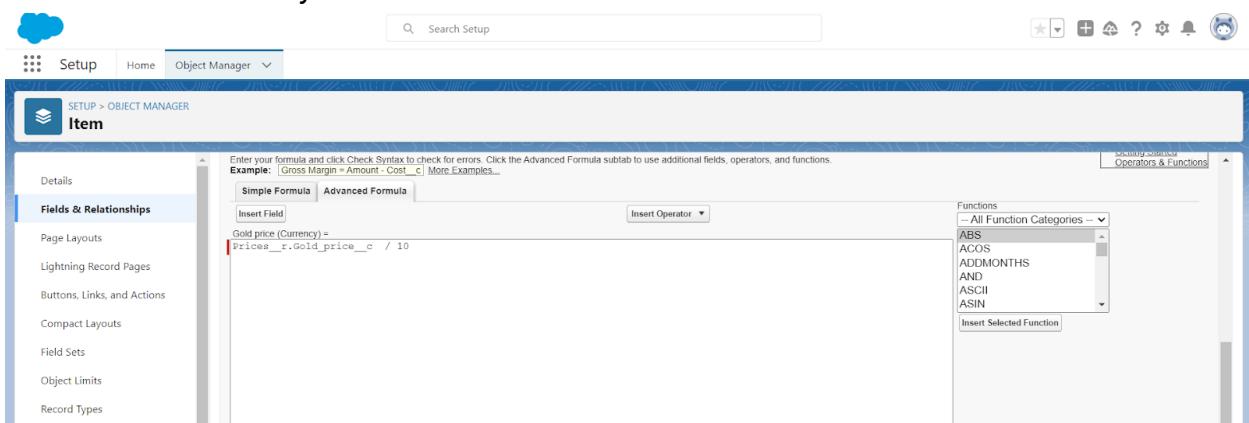
1. Go to setup >> click on Object Manager >> type object name(Price) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select Data type as “Currency” and click Next.
4. Enter Field Label as “Gold Price” and length as “ 8”and decimal 5.Field name will be auto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

The screenshot shows the 'Price' object's 'Fields & Relationships' setup page in Salesforce. The left sidebar has 'Fields & Relationships' selected. The main area shows the 'Field Label' as 'Gold price', 'Length' as '8', 'Decimal Places' as '0', and 'Field Name' as 'Gold_price'. There are also fields for 'Description' and 'Help Text'.

5.9 Creating Formula Field(Cross Object) in Item Object:

To create fields in an object:

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



5.10 Creating Remaining Fields in Objects:

Now create the remaining fields using the data types mentioned.

s.no	Object name	Fields										
1	Jewel Customer	<table border="1"> <thead> <tr> <th>Field Name</th><th>Data type</th></tr> </thead> <tbody> <tr> <td>State</td><td>Text (20)</td></tr> <tr> <td>Street</td><td>Text (20)</td></tr> <tr> <td>Country</td><td>Text (18)</td></tr> <tr> <td>Zip/Postal code</td><td>Text (6)</td></tr> </tbody> </table>	Field Name	Data type	State	Text (20)	Street	Text (20)	Country	Text (18)	Zip/Postal code	Text (6)
Field Name	Data type											
State	Text (20)											
Street	Text (20)											
Country	Text (18)											
Zip/Postal code	Text (6)											
2	Price	<table border="1"> <thead> <tr> <th>Silver Price</th><th>Currency (Length=8, Decimal=5)</th></tr> </thead> </table>	Silver Price	Currency (Length=8, Decimal=5)								
Silver Price	Currency (Length=8, Decimal=5)											

3	Item	
	Field Label: Customer Name	Lookup Relationship with Jewel Customer Object
	Ornament	Text (20)
	Weight	Number (Length=8, Decimal=5)
	Stone Weight	Number (Length=5, Decimal=5)
	Percentage	Number (Length=2, Decimal=0)
	Stone/Other Price	Currency (Length=8, Decimal=2)
	Expected Days of Return	Picklist <ul style="list-style-type: none"> 1-3 Days 4-5 Days 6-7 Days 8-10 Days
	Priority	Picklist <ul style="list-style-type: none"> Low Medium High Critical
	Silver Price	Formula

4	Customer Order	<table border="1"> <tr> <td>Order Status</td><td>Picklist</td></tr> <tr> <td></td><td> <ul style="list-style-type: none"> Started Not Started On Hold Completed Not Completed </td></tr> </table>	Order Status	Picklist		<ul style="list-style-type: none"> Started Not Started On Hold Completed Not Completed
Order Status	Picklist					
	<ul style="list-style-type: none"> Started Not Started On Hold Completed Not Completed 					

5	Billing	Field Label: Item	Lookup Relationship with Item Object
		Ornament	<p>Formula (Return Type: Text)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item r. Ornament c</div>
		Stone weight	<p>Formula (Return Type: Number) (Decimal=2)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item r. Stone weight c</div>
		Weight	<p>Formula Return Type: Number (Decimal=2)</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;">Item r. Total weight c</div>
		Amount	<p>Formula (Return Type: Currency)</p>

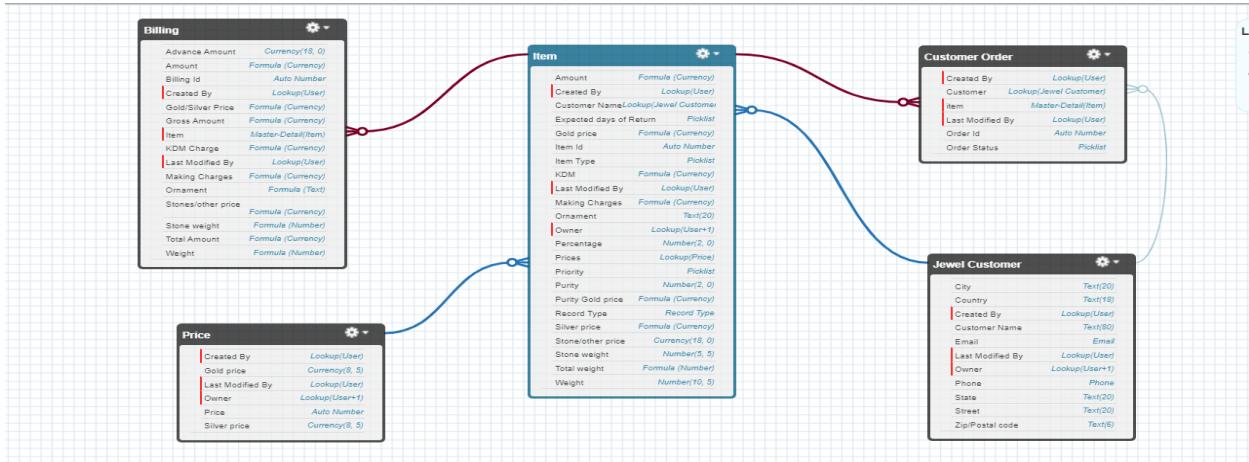
		(Decimal=2) Item r. Amount c
	Gold/Silver Price	Formula (Return Type: Currency) (Decimal=2) IF (ISPICKVAL (Item r. Item Type c, "Gold"), Item r. Gold price c, Item r. Silver price c)
	KDM Charge	Formula (Return Type: Currency) (Decimal=0) Item r. KDM c
	Making Charges	Formula (Return Type: Currency) (Decimal=2) Item r. Making Charges c
	Stones/other price	Formula (Return Type: Currency) (Decimal=2) Item r. Stone other price c
	Total Amount	Formula (Return Type: Currency) (Decimal=0) Amount c + KDM Charge c + Stones other price c + Making Charges c

5.11 Schema Builder:

Schema Builder is a powerful tool within Salesforce that allows you to visualize, explore, and design the relationships between objects in your Salesforce organization. It provides a graphical representation of the data model, making it easier to understand the structure and connections between different objects.

Creating Schema Builder

1. Go to setup >> click on Object Manager >> Schema Builder.
2. Select objects >> Enter Objects as “Jewel Customer,Item,Customer Order, Price, Billing objects” in quick box and select them.



5.12 Creating the Field Dependencies:

Use case:

Field Dependencies are used to create relationships between fields within an object. They allow you to control the visibility and availability of fields based on the values selected in other fields.

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar >>click on the object.
2. Click on Fields & Relationships and click on the Priority field.
3. Search for Field Dependencies and click on New.
4. Select Controlling Field as “Priority” and Depending field as “Expected Days of Return”>>Continue.

New Field Dependency

[Help for this Page](#)

Create a dependent relationship that causes the values in a picklist or multi-select picklist to be dynamically filtered based on the value selected by the user in another field.
 • The field that drives filtering is called the "controlling field." Standard and custom checkboxes and picklists with at least one and less than 300 values can be controlling fields.
 • The field that has its values filtered is called the "dependent field." Custom picklists and multi-select picklists can be dependent fields.

Step 1. Select a controlling field and a dependent field. Click Continue when finished.

Step 2. On the following page, edit the filter rules that control the values that appear in the dependent field for each value in the controlling field.

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

5.13 Creating the validation rule:

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

Note : check whether the fields mentioned in the formula field are created or not , if not go to activity 10 and create those fields mentioned in Jewel Customer object.

1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “Postal Code ”.

4. Insert the Error Condition Formula as :-

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

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

The screenshot shows the 'Validation Rule Edit' screen for the 'Postal Code' field of the 'Jewel Customer' object. The 'Rule Name' is set to 'Postal Code'. The 'Error Condition Formula' is defined as:

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

The formula is highlighted with a red box. A 'Check Syntax' button at the bottom left of the formula area shows 'No errors found'. To the right of the formula, a dropdown menu lists various functions like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc., with 'ABS' currently selected. Below the formula, an 'Error Message' section contains the text 'Must contain 6 digits' in a red box. The 'Error Location' is set to 'Field' and 'Zip/Postal code'. The 'Save' button at the top right is also highlighted with a red box.

NOTE: Create One more Validation rule for Jewel Customer object.

1. Enter Rule name as "ValidationRule For JewelCustomerObject".
2. Insert the Error Condition Formula as :-
OR(ISBLANK(City_c), ISBLANK(Country_c),ISBLANK(Phone_c),ISBLANK(State_c),ISBLANK(Street_c))
3. Enter the Error Message as "Please fill Required fields", select the Error location as Top of Page and click Save.

Create Validation rule for Item object:

1. Enter Rule name as "ValidationRule For Item".
2. Insert the Error Condition Formula as :- OR(ISBLANK(Amount_c), ISBLANK(Customer_Name_c),ISBLANK(Gold_price_c),ISBLANK(KDM_c),ISBLANK(Ornament_c),ISBLANK(Percentage_c),ISBLANK(Making_Charges_c),ISBLANK(Prices_c),ISBLANK(Stone_weight_c),ISBLANK(Silver_price_c),ISBLANK(Stone_other_price_c),ISBLANK(Stone_weight_c),ISBLANK(Weight_c))
3. Enter the Error Message as "Please fill Required fields", select the Error location as Top of Page and click Save.

Task 6: Profiles.

6.1 Gold Smith Profile:

To create a new profile:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (System Administrator) >> enter profile name (Gold Smith) >> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Jewel Customer,Item,Customer Order,Prices,Billings .
4. Scroll down and Click on Save.

The image consists of two side-by-side tables representing object permissions. Both tables have columns for Basic Access (Read, Create, Edit, Delete) and Data Administration (View All, Modify All). A red box highlights the 'Billings' row in the left table, and another red box highlights the 'Customer Orders' row in the left table, and the 'Prices' row in the right table.

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

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

6.2 Worker Profile:

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

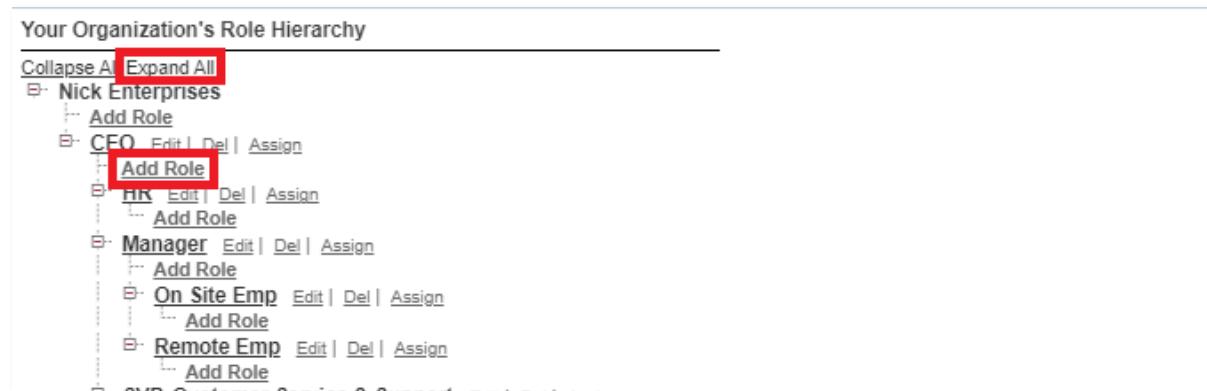
Task 7: Roles.

Creating Gold Smith Role:

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

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar has a search bar ('roles') and a 'Roles' link under the 'Users' category. The main content area is titled 'Understanding Roles' and describes setting up a Role Hierarchy. It shows a sample hierarchy with 'Executive Staff' at the top, followed by 'Western Sales Director', 'Eastern Sales Director', and 'International Sales Director'. Below them are 'Western Sales Rep', 'Eastern Sales Rep', and 'International Sales Rep'. Descriptions for each role level are provided. At the bottom right of the main content area is a 'Set Up Roles' button.

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



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

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

Task 8: Users.

8.1 Create User:

1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
 1. First Name : Nicklaus
 2. Last Name : Mikaelson
 3. Alias : Give a Alias Name
 4. Email id : Give your Personal Email id
 5. Username : Username should be in this form: text@text.text
 6. Nick Name : Give a Nickname
 7. Role : Gold Smith
 8. User license : Salesforce
 9. Profiles : Gold Smith
3. Save.

8.2 Create User:

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

Note: Create two more users as mentioned in activity 2 using the same profile.

Task 9: Page layouts.

9.1 To Create a Gold Page layout:

1. Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.
2. Click on Page layout >> Click on New.



The screenshot shows the 'Page Layouts' list view. At the top right, there are buttons for 'Quick Find', 'New' (which is highlighted with a red box), and 'Page Layout Assignment'. Below the header, there's a table with columns: 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. One row is visible, showing 'Item Layout' created by 'meghana katoju' on 6/29/2023 at 10:48 PM, last modified by 'meghana katoju' on 7/18/2023 at 11:45 AM.

3. Give Page layout Name as "Page Layout for Gold" and click on Save.



The screenshot shows the 'Create New Page Layout' dialog. It has a note at the top: 'As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names are translated for your international users.' Below this is a dropdown 'Existing Page Layout' set to 'Item Layout' and a text input 'Page Layout Name' containing 'Page Layout for Gold'. At the bottom are 'Save' and 'Cancel' buttons.

4. Arrange the field as shown in the Information Section ,remove fields which are related to Silver and click Ok.

The screenshot shows the Salesforce Page Layout Editor. On the left, there's a sidebar with various layout options like Details, Fields & Relationships, Page Layouts (which is selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main area has tabs for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. Under the Fields tab, there's a 'Fields' section with a 'Section' button highlighted in orange. Below it is a 'Blank Space' button. To the right is a table with columns: Customer Name, Item Type, Ornament, Priority, Silver price, and Weight. The 'Silver price' column contains the value 'Stone/other price'. A tooltip for 'Silver price' shows its label as 'Purity', type as 'Number', length as 2, and decimal places as 0. At the bottom of the page layout editor, there's a red box highlighting the 'Information' section, which contains a table of fields and their values. The 'Silver price' row is also highlighted with a blue bar at the top. The entire 'Information' section is enclosed in a red border.

5. Click Save.
6. Make sure your page layout looks like the picture above.

9.2 To Create a Silver Page layout:

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

The screenshot shows the Salesforce Page Layout Editor. The interface is similar to the previous one, with the 'Information' section highlighted by a red box. The 'Silver price' field is again highlighted with a yellow box and its properties are shown in a tooltip. The 'Information' section table includes fields like Item Id, Customer Name, Prices, Item Type, Ornament, Priority, Silver price, Weight, and so on. The 'Silver price' row is highlighted with a blue bar at the top. The entire 'Information' section is enclosed in a red border.

Task 10: Record Types.

To create a Record Type:

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

The screenshot shows the Salesforce Object Manager interface. The left sidebar has a 'Record Types' link highlighted with a red arrow. The main area displays a table titled 'Record Types' with two items: 'Gold' and 'Silver'. The 'Gold' item has a description of 'Gold items information' and was modified by 'meghana katoju' on 7/18/2023, 11:45 AM. The 'Silver' item has a similar description and modification details. The top right of the screen includes a 'Quick Find' bar, a 'New' button, and a 'Page Layout Assignment' link.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	meghana katoju, 7/18/2023, 11:45 AM
Silver	Silver items information	✓	meghana katoju, 7/18/2023, 11:45 AM

3. Select Existing Record as "Master", Record type Label as "Gold", Description as "Gold items information".

The screenshot shows the 'Edit Record Type' dialog for 'Gold'. The dialog title is 'Edit Record Type Gold'. It contains a note: 'Enter a new name for the selected record type and click Save.' Below this is a 'Record Type' section with fields: 'Record Type Label' (set to 'Gold'), 'Record Type Name' (set to 'Gold'), 'Namespace Prefix' (empty), 'Description' (set to 'Gold items information'), and 'Active' (checkbox checked). At the bottom are 'Save' and 'Cancel' buttons. A large red rectangle surrounds the entire dialog area.

4. Uncheck for "Make Available".
5. Scroll down and check for the Gold Smith, Worker & System Administrator profile and click on Next.
6. Select "Apply a different layout for each profile", and change page layout to "Page Layout for Gold" for Gold Smith, Worker and System Administrator >> save & new.

Note: Create another Record Type with name "Silver" following the steps from Activity1 (Use page layout for Silver).

Task 11: Permission Sets.

Creating permission set:

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets.

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

The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' and 'Home' are visible. Below them, a sidebar menu includes 'Permission sets' (which is highlighted with a red box) and 'Users'. Under 'Users', there is a 'Permission Sets' link (also highlighted with a red box). The main content area is titled 'Permission Sets' and contains a table of existing permission sets. At the top of this table, there is a 'New' button (highlighted with a red box). The table lists several permission sets, each with a checkbox, a label, a description, and a 'License' column. For example, the 'Buyer' permission set is described as allowing access to the store and managing carts, and it is associated with the 'B2B Buyer Permission Set One Seat' license.

2. Enter the label name as "Per to Worker", API will be auto populated >> save.
3. Under Apps Select object settings.

The screenshot shows the 'Apps' section in the Salesforce Setup interface. On the left, there is a sidebar with the text 'Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform' and a 'Learn More' link. The main content area is divided into several sections: 'Assigned Apps', 'Assigned Connected Apps' (which is highlighted with a red box), 'Object Settings' (also highlighted with a red box), 'App Permissions', 'Apex Class Access', 'Visualforce Page Access', 'External Data Source Access', 'Flow Access', 'Named Credential Access', 'Custom Permissions', 'Custom Metadata Types', and 'Custom Setting Definitions'. Each section provides a brief description of its purpose.

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

The screenshot shows the 'Permission Sets' page in Salesforce. The 'Items' tab is selected. Under 'Object Permissions', the 'Edit' row is highlighted with a red box. The 'Enabled' column for 'Edit' has three checked boxes: 'Read', 'Create', and 'Edit'. Other rows like 'Delete', 'View All', and 'Modify All' have empty checkboxes in the 'Enabled' column.

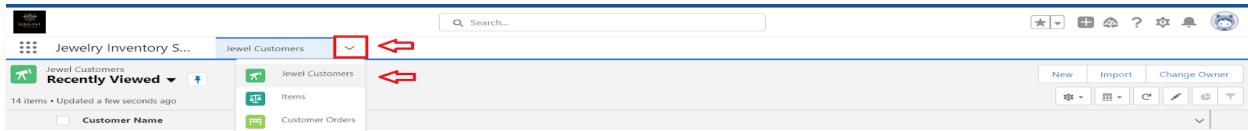
5. Click on Save.
 6. After saving the permission click on the Manage assignment
 7. Now click on the Add Assignment.
 8. Now select the users which you have created in user milestone, using Worker profile and click on Next >> Assign >> Done.

The screenshot shows the 'Select Users to Assign' screen. It lists users with checkboxes. For 'Mani deepak' and 'Megha Katoju Site Guest User', the 'Role' column contains a 'Worker' button, which is highlighted with a red box. The 'Profile' column shows their respective profiles: 'Chatter Free User' and 'Megha Katoju Profile'.

Task 12: User Adoption

12.1 Create a Record (Jewel Customer):

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



12.2 View a Record(Jewel Customer):

1. Click on App Launcher on the left side of the screen.
2. Search Jewelry Inventory System & click on it.
3. Click on the Jewel Customer Tab.
4. Click on any record name. you can see the details of the Jewel Customer.

12.3 Delete a Record(Jewel Customer):

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

Note: Create at least 10 records for each of the objects: Jewel Customer, Price, Item, Customer Order and Billing.

Task 13: Reports

13.1 Create Report

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

Jewelry Inventory S... Reports

REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

REPORT NAME

New Report billing v order

New Items with Billir

New Prices Report

Days on Market

New Billings with It

New Billings with It

Report

New Opportunities v

Report

New Accounts Repor

New orders Report

New Billings with Price Report

Copy of New Report

New Employees Report

Jewel Customers

Items

Customer Orders

Prices

Billings

Reports

Folder

Created By

Created On

Subscribed

Search recent reports...

New Report

New Folder

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

Jewelry Inventory S... Prices Report Builder

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Select a Report Type

PRICE

Report Type Name

Price Books with Products

Items with Prices

Prices

Category

Standard

Standard

Standard

4. Customize your report

5. Add fields from the left pane as shown below.

Jewelry Inventory S... Prices Report Builder

REPORT ▾

New Prices Report ▾ Prices

Fields

Outline

Groups

GROUP ROWS

Add group...

Columns

Add column...

Price: Price

Gold price

Silver price

Price: Price

1 p-022

2 p-021

3 p-027

4 p-029

5 p-030

6 p-026

7 p-025

8 p-028

9 p-024

10 p-023

To see the latest edits, refresh the preview. Refresh

Add Chart

Save & Run

Save

Close

Run

Update Preview Automatically

6. Save or run it.

	Price: Price	Gold price	Silver price
1	p-022	₹60,000.00000	₹71,000.00000
2	p-021	₹63,000.00000	₹72,000.00000
3	p-027	₹62,350.00000	₹70,200.00000
4	p-029	₹58,700.00000	₹69,000.00000
5	p-030	₹66,000.00000	₹78,000.00000
6	p-026	₹62,000.00000	₹70,000.00000
7	p-025	₹58,000.00000	₹69,000.00000
8	p-028	₹59,900.00000	₹73,000.00000
9	p-024	₹62,000.00000	₹73,000.00000
10	p-023	₹58,000.00000	₹66,000.00000
11		₹609,950.00000	₹714,200.00000

Note: Reports may get varied from the above pictures as the data might be different.

13.2 Creating Report

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

Task 14 :Creating Dashboards

Go to the app>>click on the Dashboards tabs.

The screenshot shows the app's main navigation bar with various tabs like Home, Employees, Assets, Asset Services, Projects, ProjectTasks, Reports, and Dashboards. The 'Dashboards' tab is highlighted with a red box. Below the navigation, there's a sidebar titled 'DASHBOARDS' with categories: Recent, Created by Me, Private Dashboards, and All Dashboards. On the right, there's a search bar for recent dashboards and a button for 'New Dashboard'. A red box also highlights the 'New Dashboard' button.

1. Give a Name and click on

New Dashboard

* Name

Description

Folder

Create

2. Select add component.
3. Select a Report and click on select

The screenshot shows the 'Report Builder' interface with a 'Select Report' dialog open. The dialog lists recent reports under the 'Recent' tab. One report, 'New Report billing with items with order' by meghana katoju from Jul 19, 2023, at 4:34 AM, is selected. Other reports listed include 'New Items with Billings Report' and 'New Prices Report'. The 'Reports' tab is also visible.

4. Click Add, then click on Save and then click on Done.

Note: Create another Dashboard as we discussed in activity 1.

The screenshot shows the 'Dashboard 1' interface with three components added:

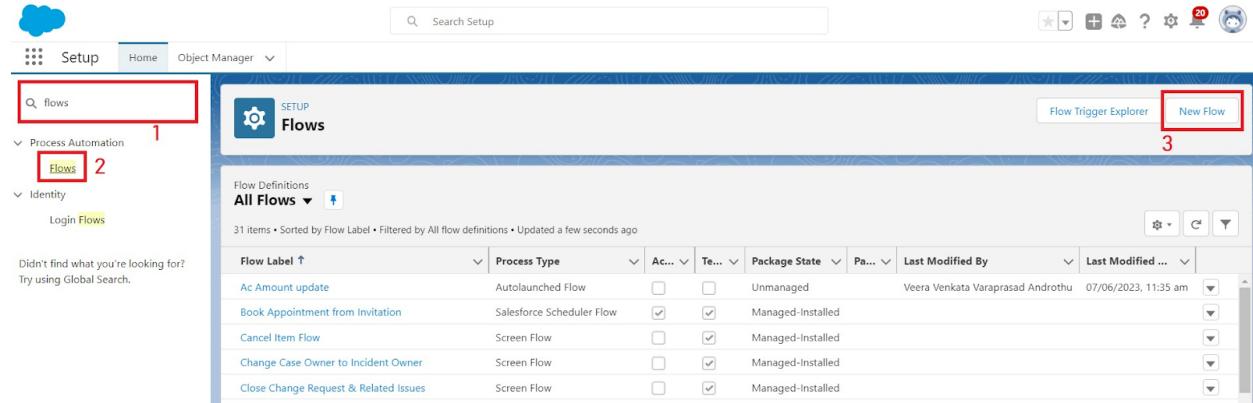
- New Items with Billings Report:** A funnel chart showing the sum of total weight: 92.9, with values 75 and 17.9.
- New Report billing with items with order:** A bar chart showing the sum of amount for various items: Brooch (~₹60k), NECKLACE (~₹80k), Ring (~₹10k), Silver Anklet (~₹5k), and Toe ring (~₹5k).
- New Prices Report:** A table listing item IDs, item names, gold prices, and silver prices.

Item	Item Id	Gold price	Silver price
Brooch	p-021	₹63,00000k	₹72,00000k
NECKLACE	p-022	₹60,00000k	₹71,00000k
Ring	p-023	₹58,00000k	₹69,00000k
Silver Anklet	p-024	₹62,00000k	₹73,00000k
Toe ring	p-025	₹58,00000k	₹69,00000k
	p-026	₹62,00000k	₹70,00000k
	p-027	₹62,35000k	₹70,20000k

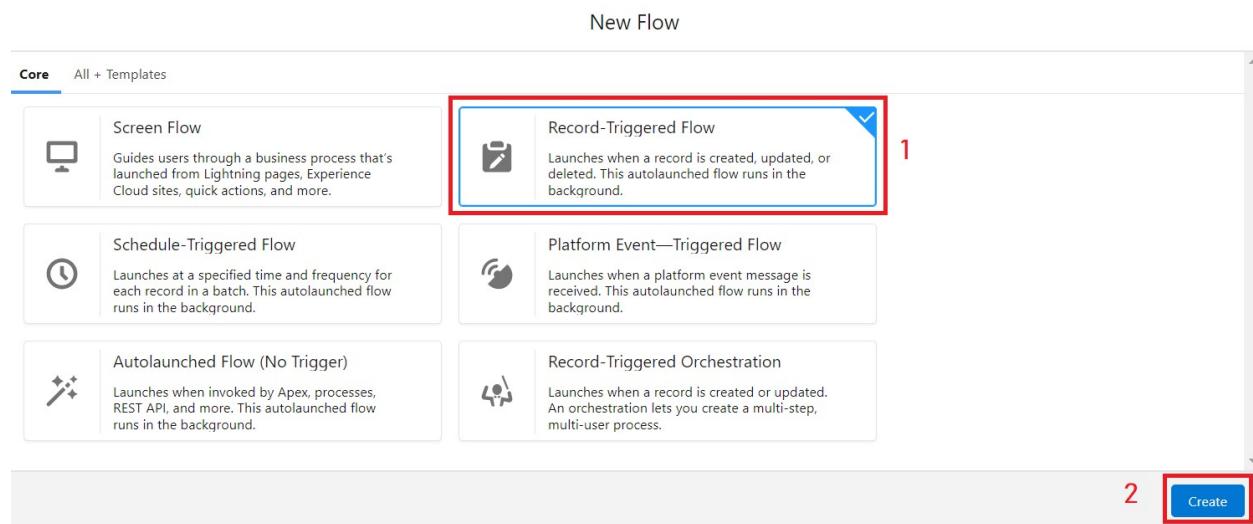
Task 14:Flows

14.1 Create a Flow

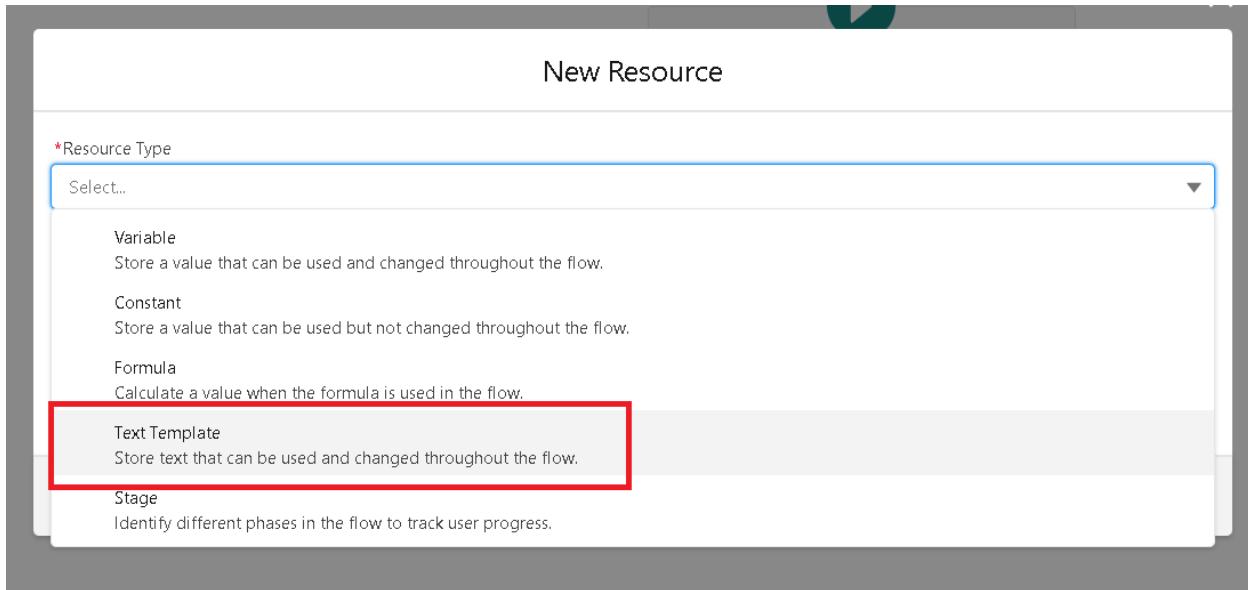
Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.



2. Select the Record-triggered flow and Click on Create.



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



8. Enter the API name as “ Email body”.

The screenshot shows the 'Edit Text Template' interface. The 'API Name' field is filled with 'EmailBody' and is highlighted with a red box. The 'Body' field contains the following text:

```
Hello  
Customer Name: {!$Record.Item__r.Customer_Name__r.Name}
```

At the bottom right, there are 'Cancel' and 'Done' buttons.

10. Change the view as Rich Text>>View to Plain Text.

11. In the body field paste the syntax that is given below.

Hello

Customer Name: {!\$Record.Item__r.Customer_Name__r.Name}

Here are the details for the item you purchased with Jewelry Inventory System

Item Type: {!\$Record.Item__r.Item_Type__c}

Ornament: {!\$Record.Ornament_c}

Weight: {!\$Record.Weight_c}grams

Amount: {!\$Record.Amount_c}

12. Click done.

13. Now click on elements, and drag the action element into the preview pane.

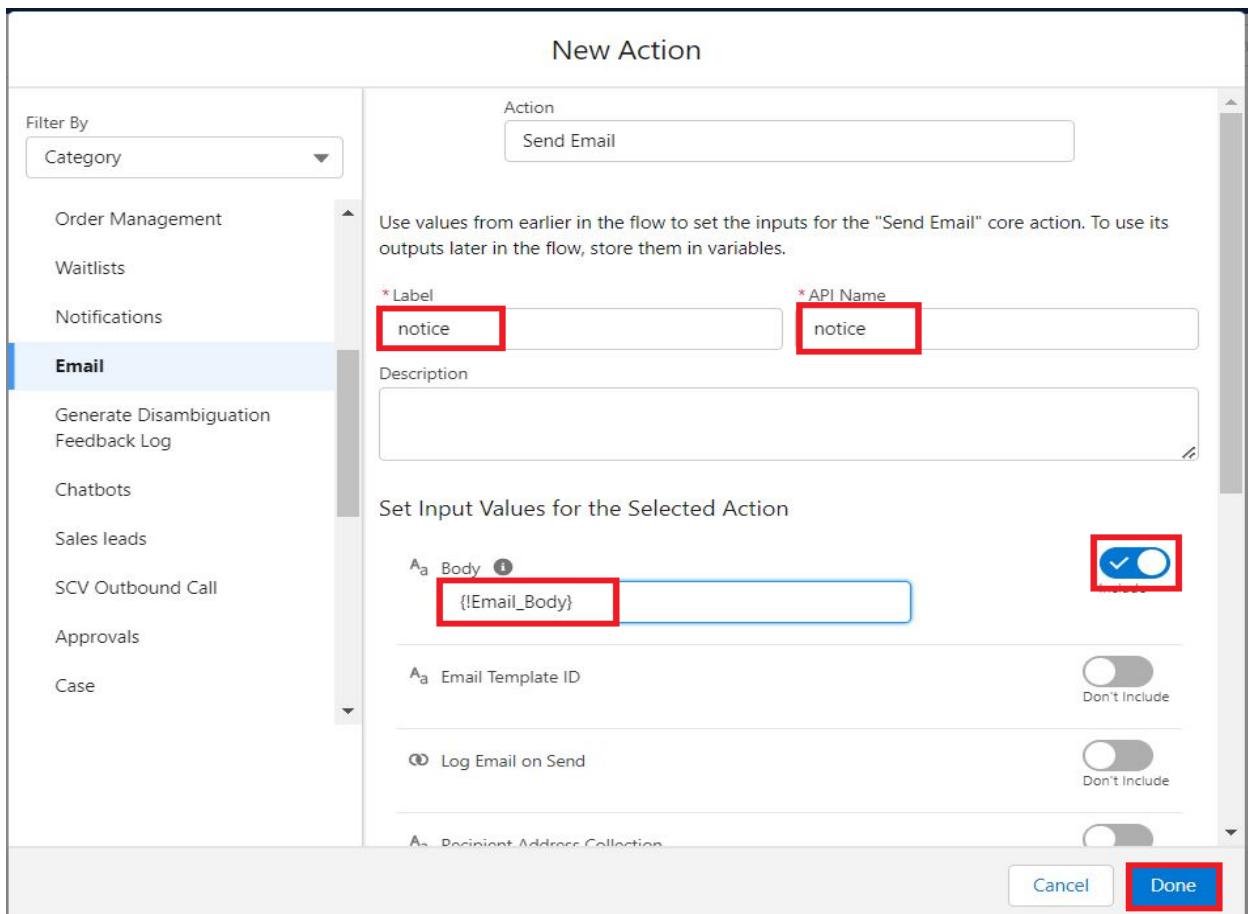
14. Their action bar will be opened in that search for " send email " and click on it.

15. Give the label name as " notice "

16. API name will be auto populated.

17. Enable the body to set input values for the selected action.

18. Select the text template that was created.



19. Include Recipient Address list; select the email from the record.

({!!\$Record.Item_r.Customer_Namer.Email_c})

20. Include the subject as "Welcome to Jewelry Inventory System".

21. Click done.

22. Now drag the path from the start to the action element. Click on save.

23. Given the Flow label ,Flow Api name will be auto populated.

24. And click save, and click on activate.

