CRM JEWEL MANAGEMENT

College:Ayyanthiruvalluvar Arts and Science College

Code : bru4m

TEAM ID : NM2025TMID2791

TEAM SIZE : 4

TEAM MEMBERS:

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Email

Team Member 3:AMULARASAN

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1.INTRODUCTION:

ProjectOverview

CRMApplicationforJewelManagement-(Developer)

The Jewel Inventory System is a comprehensive software Solution designed to streamline and manage the inventory and sales processes of a jewellery store or a jewellery manufacturer. The system aimstoprovideanefficientanduser-friendlysolutiontotrackandcontrol the inventory of various jewellery items, maintain accurate records, and facilitate seamless sales transactions.

Purpose

TheJewelGuardCRMapplicationisdesignedtostreamlineand optimizejewel managementfordevelopers,jewelers,andretailers.Its primary purpose is to:

1. TrackInventory:Manageandmonitorjewelstocklevels, including details like type, quantity, value, and location.

2. CustomerManagement:Storecustomerinformation,purchase history, and preferences to enhance customer relationships and targeted marketing.

3. SalesandOrderManagement:Automatesalesprocesses, track orders, and manage invoices and payments.

4. ReportingandAnalytics:Provideinsightsintosalestrends, inventory levels, and customer behavior to inform business decisions.

5. SecurityandCompliance:Ensuresecurestorageandhandling of sensitive customer and jewel data, adhering to industry regulations.

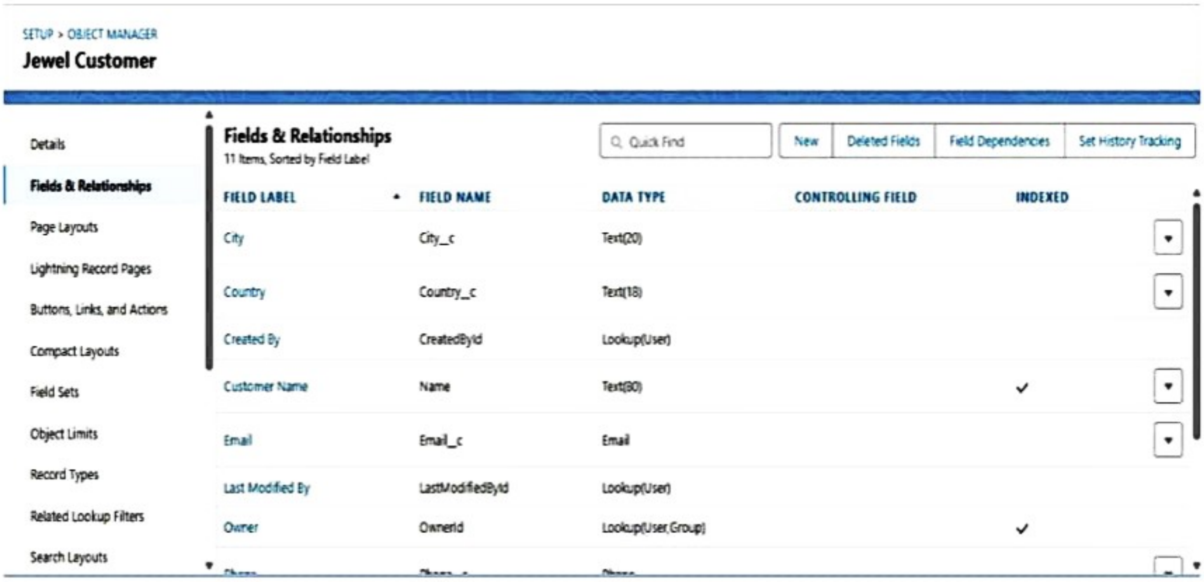
I . DEVELOPMENTPHASE

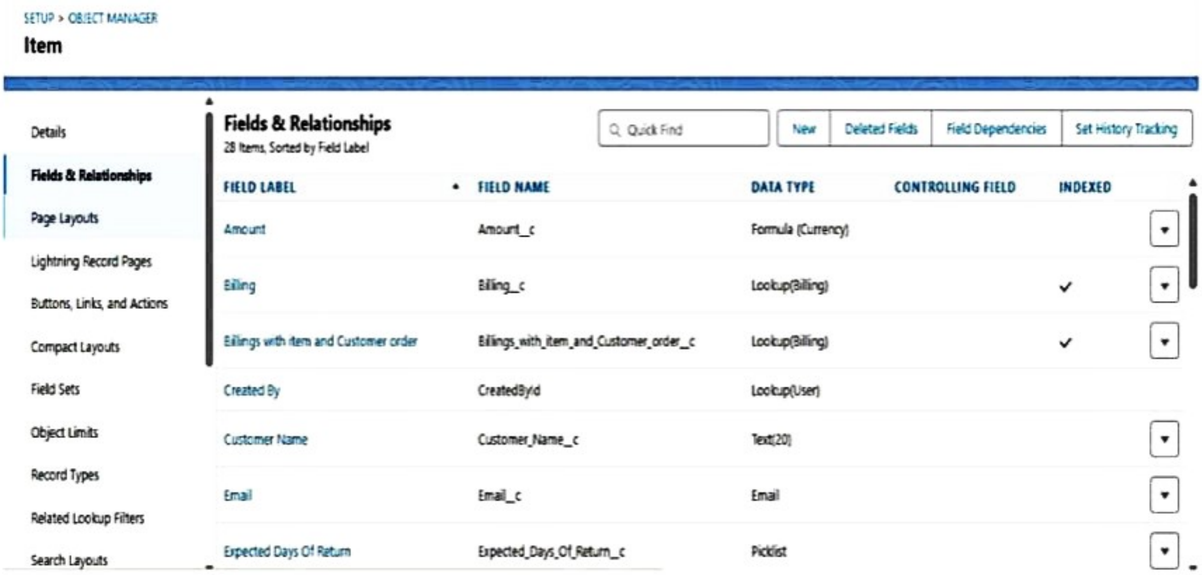
CreatingaSalesforceDeveloperAccount:

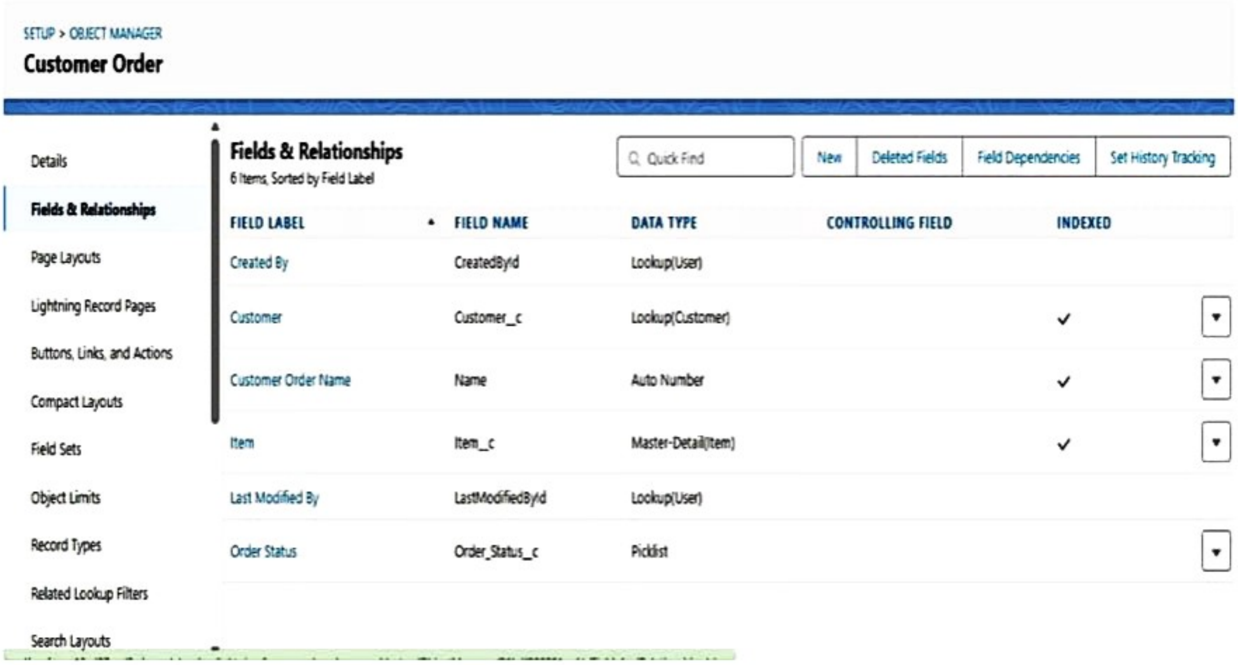
ByusingthisURL-https://www.salesforce.com/form/developer-signup/?d=pb

Created objects:

JewelCustomer,Item,CustomerOrder,Price,Billing







SETUP > OBJECT MANAGER

Customer Order

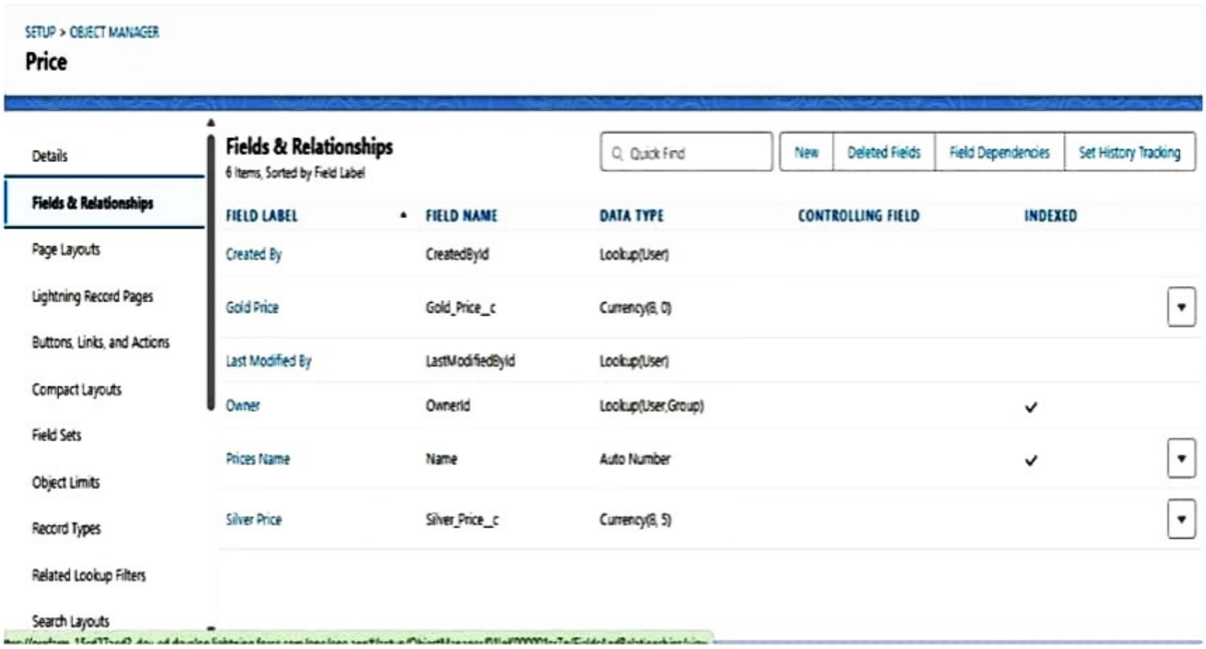
Details | Fields & Relationships | Page Layouts | Lightning Record Pages | Buttons, Links, and Actions | Compact Layouts | Field Sets | Object Limits | Record Types | Related Lookup Filters | Search Layouts

Fields & Relationships

6 Items, Sorted by Field Label

Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Customer)		✓
Customer Order Name	Name	Auto Number		✓
Item	Item__c	Master-Detail(Item)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Order Status	Order_Status__c	Picklist		



SETUP > OBJECT MANAGER

Price

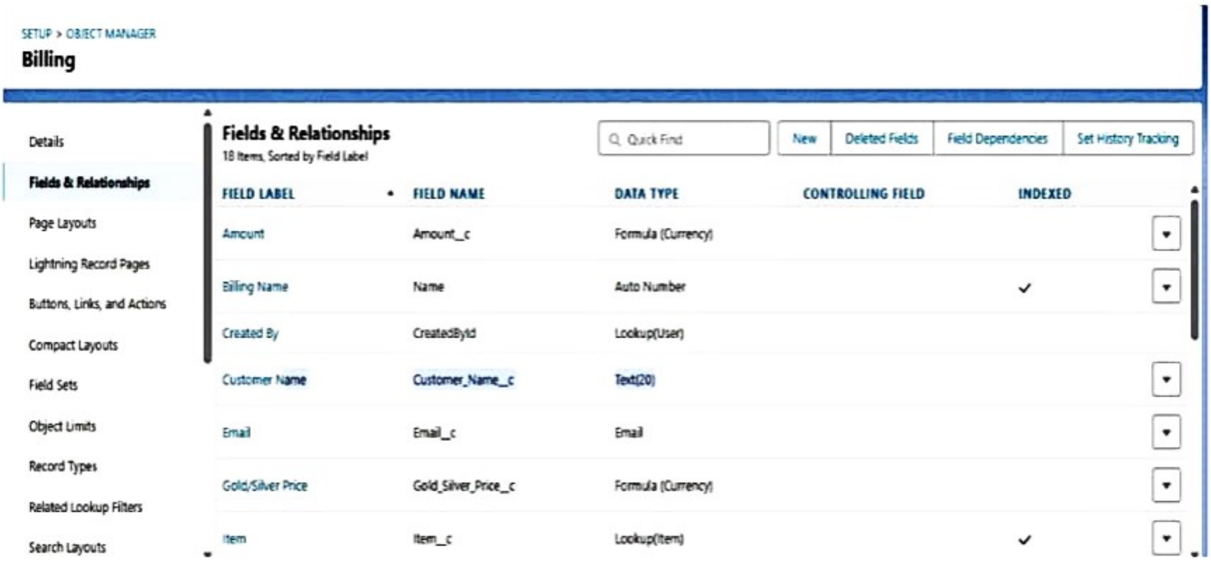
Details | Fields & Relationships | Page Layouts | Lightning Record Pages | Buttons, Links, and Actions | Compact Layouts | Field Sets | Object Limits | Record Types | Related Lookup Filters | Search Layouts

Fields & Relationships

6 Items, Sorted by Field Label

Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

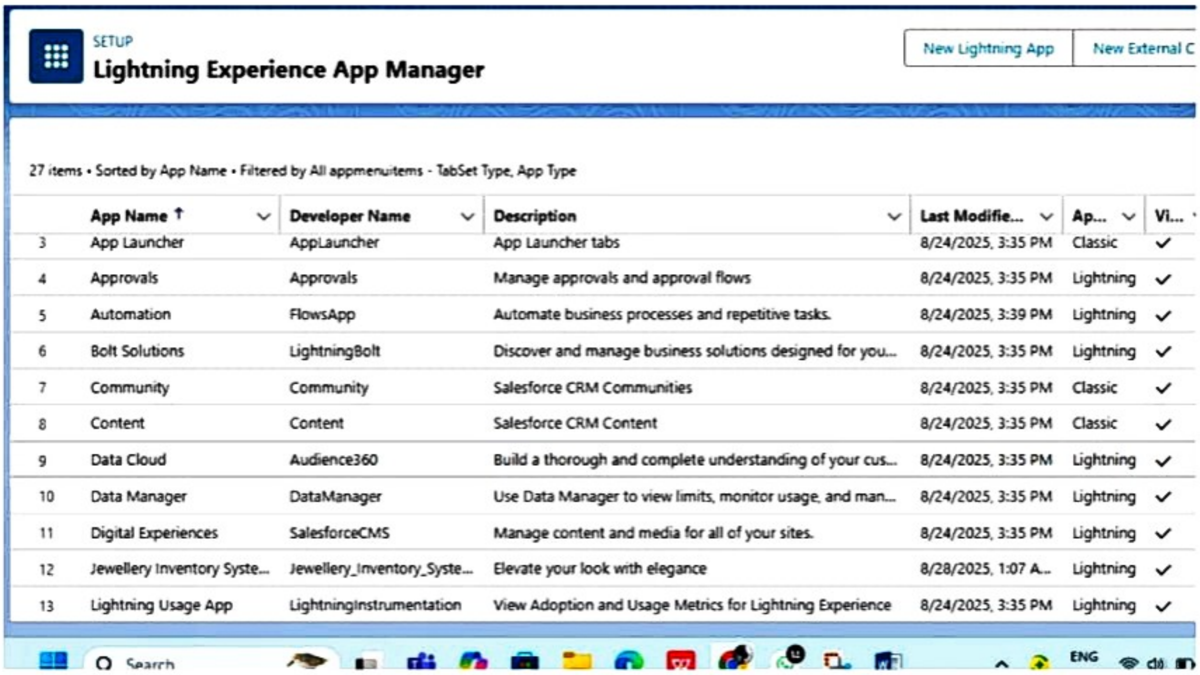
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Gold Price	Gold_Price__c	Currency(6, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Prices Name	Name	Auto Number		✓
Silver Price	Silver_Price__c	Currency(6, 5)		



▯ CreatingCustomTabs:⊠

JewelCustomer,Item,CustomerOrder,Price,Billing.

II . CreateaLightningApp



SETUP
Lightning Experience App Manager

New Lightning App | New External C

27 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

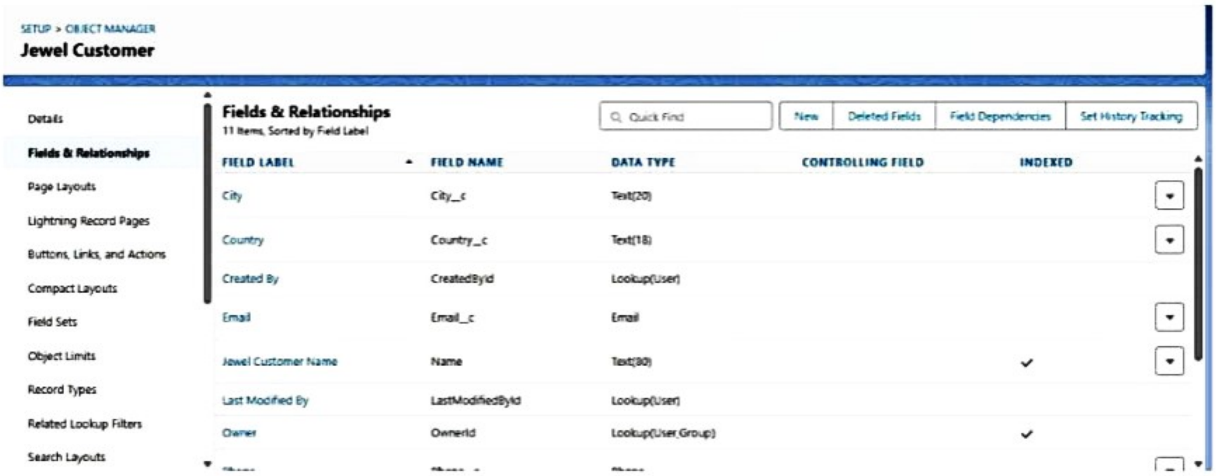
	App Name ↑	Developer Name	Description	Last Modifie...	Ap...	Vi...
3	App Launcher	AppLauncher	App Launcher tabs	8/24/2025, 3:35 PM	Classic	✓
4	Approvals	Approvals	Manage approvals and approval flows	8/24/2025, 3:35 PM	Lightning	✓
5	Automation	FlowsApp	Automate business processes and repetitive tasks.	8/24/2025, 3:39 PM	Lightning	✓
6	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for you...	8/24/2025, 3:35 PM	Lightning	✓
7	Community	Community	Salesforce CRM Communities	8/24/2025, 3:35 PM	Classic	✓
8	Content	Content	Salesforce CRM Content	8/24/2025, 3:35 PM	Classic	✓
9	Data Cloud	Audience360	Build a thorough and complete understanding of your cus...	8/24/2025, 3:35 PM	Lightning	✓
10	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and man...	8/24/2025, 3:35 PM	Lightning	✓
11	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	8/24/2025, 3:35 PM	Lightning	✓
12	Jewellery Inventory Syste...	Jewellery_Inventory_Syste...	Elevate your look with elegance	8/28/2025, 1:07 A...	Lightning	✓
13	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	8/24/2025, 3:35 PM	Lightning	✓

III . ConfiguredFieldsandRelationships

1. JewelCustomer

Fieldsin JewelCustomer

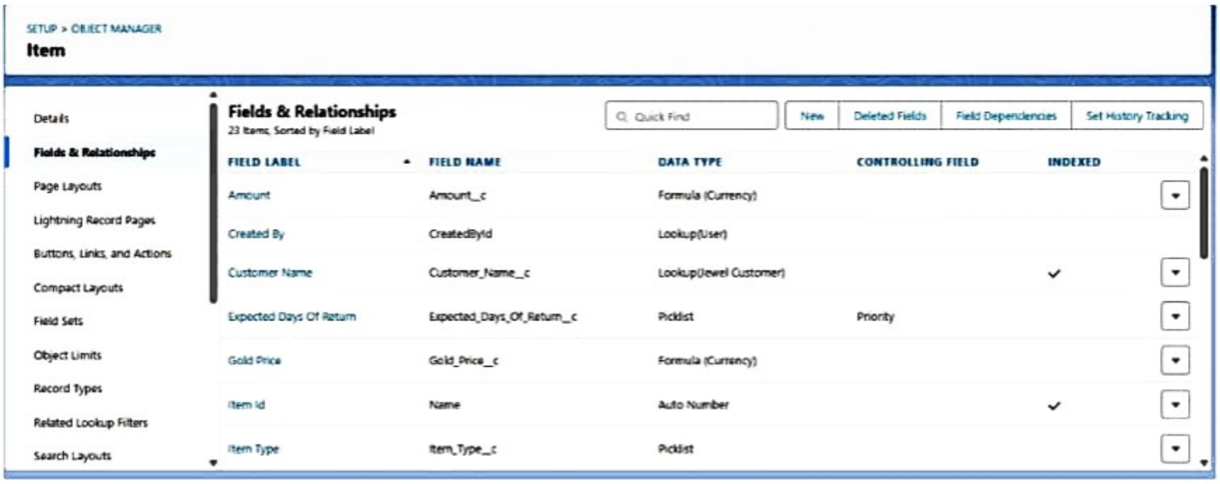
- Country
- State
- Phone
- Email
- Zip/Postalcode
- Street
- City



2. Item

Fieldsinitem

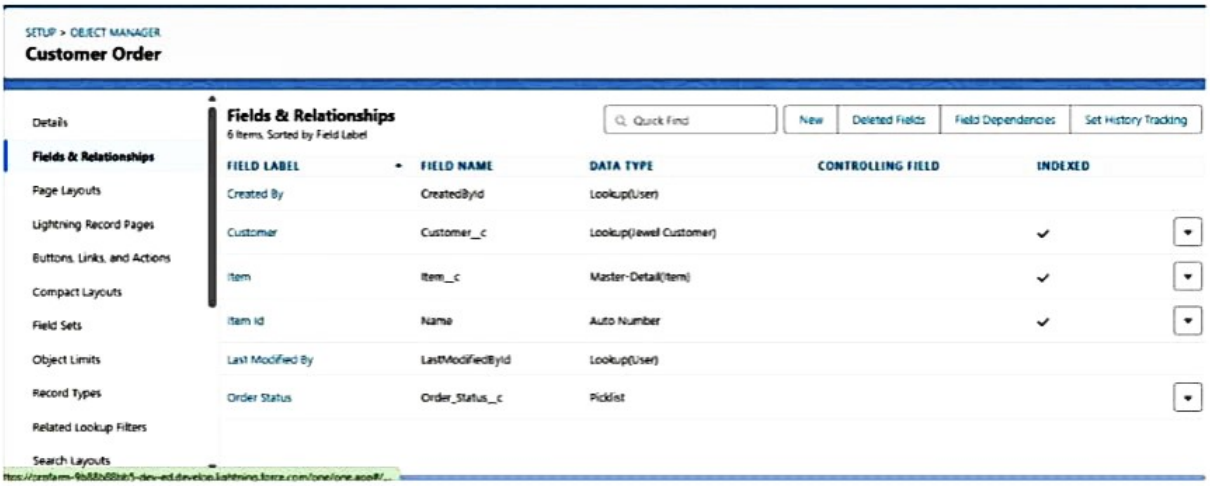
- CustomerName
- Ornaments
- Weight
- StoneWeight
- Percentage
- Stine/OtherPrice
- ExpecteddaysofReturn
- Priority
- SilverPrice
- PurityGoldPrice
- TotalWeight
- Amount
- KDM
- MakingCharges



3.CustomerOrder

FieldsinCustomerOrder

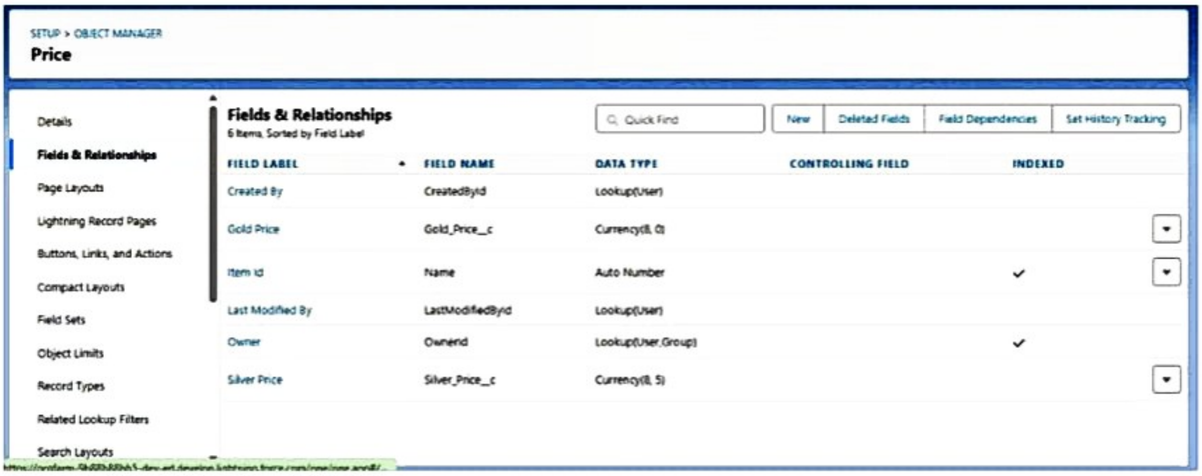
- OrderStatus



4.Price

FieldsinPrices

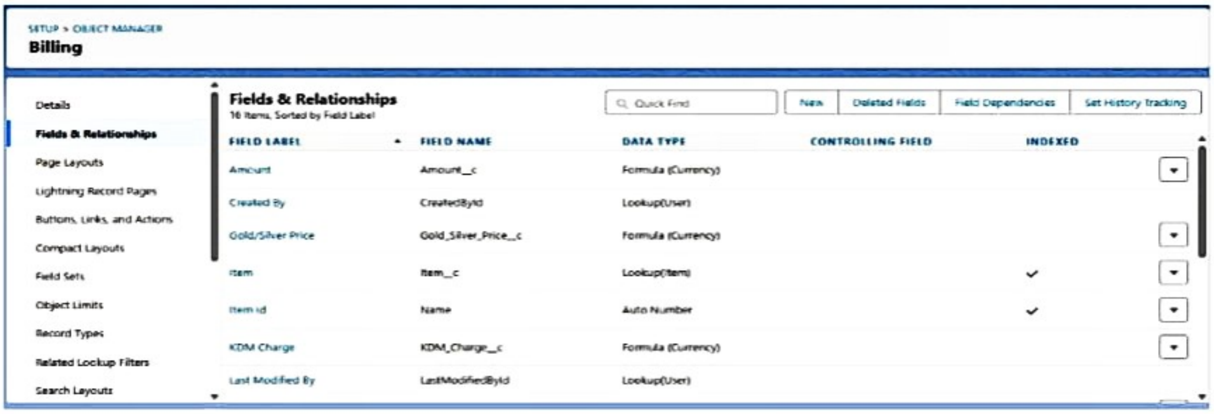
- GoldPrice
- SilverPrice



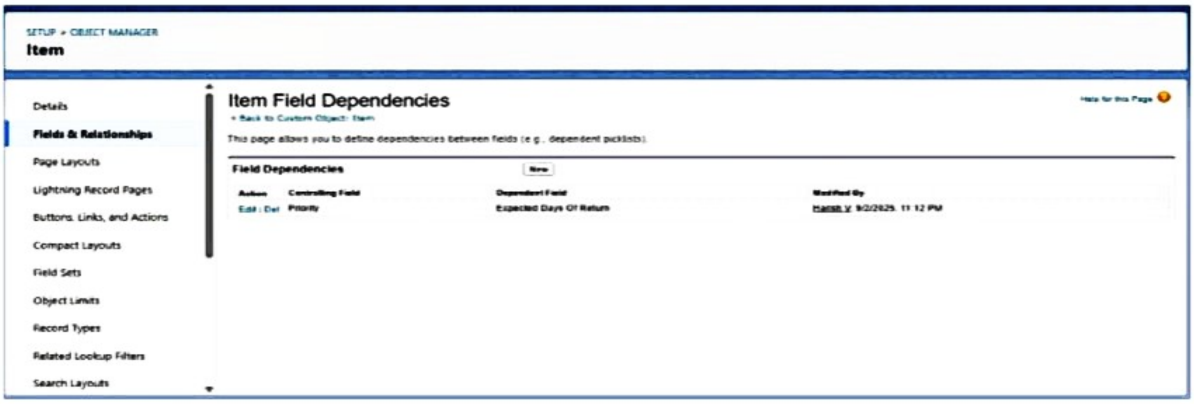
5. Billing

FieldsinBilling

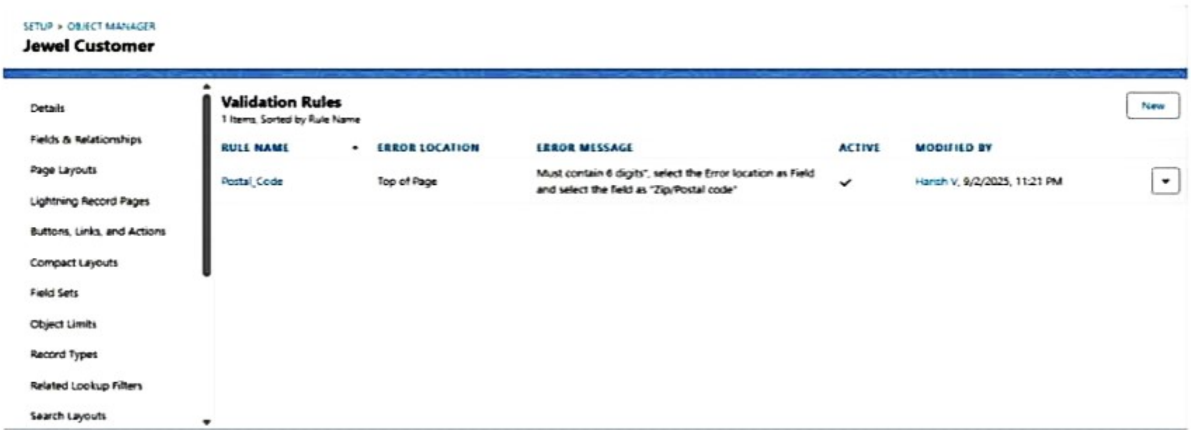
- CustomerName
- Ornaments
- Weight
- StoneWeight
- Percentage
- Stine/OtherPrice
- ExpecteddaysofReturn
- Priority
- SilverPrice
- PurityGoldPrice
- TotalWeight
- Amount
- KDM
- MakingCharges



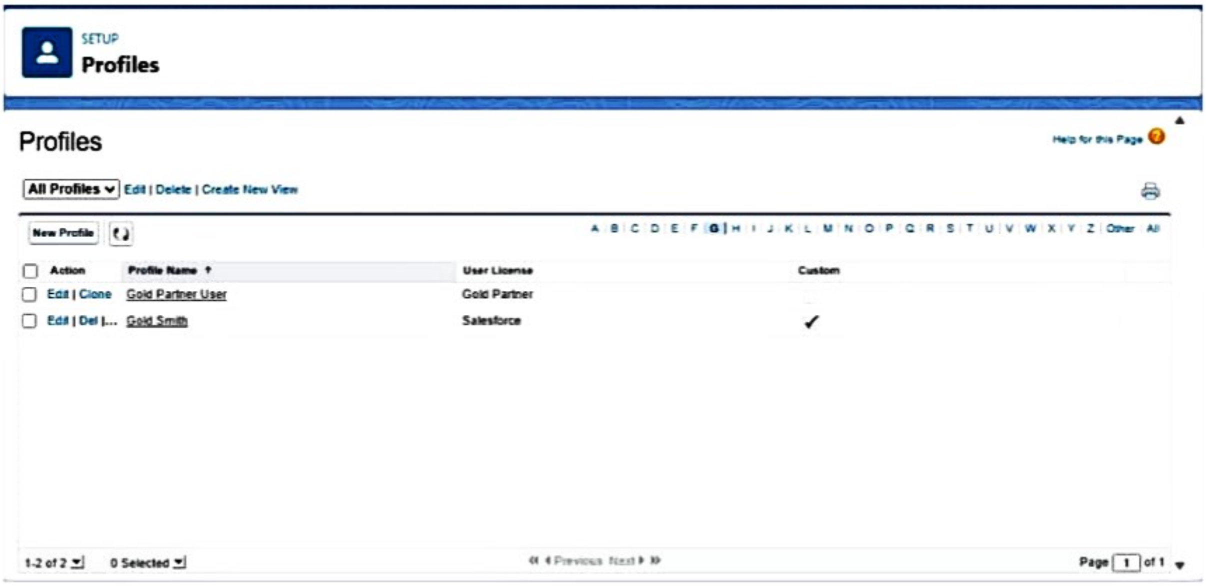
Tocreatea FieldDependenciesinitemobject



Tocreatea ValidationRulesinJewel Customer object

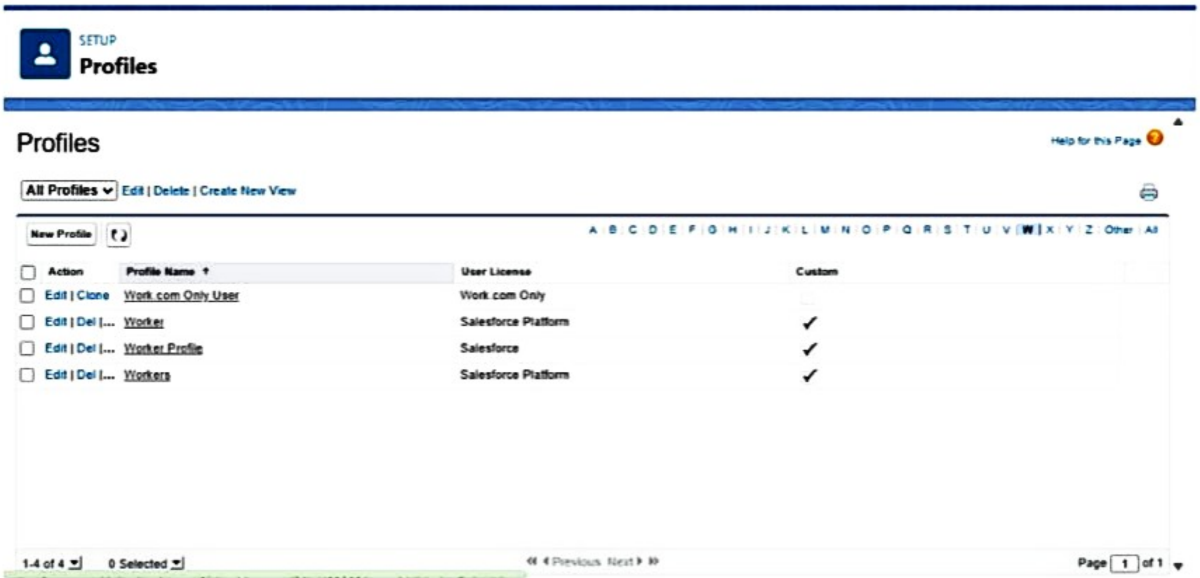


IV . CreateaGoldSmithProfile

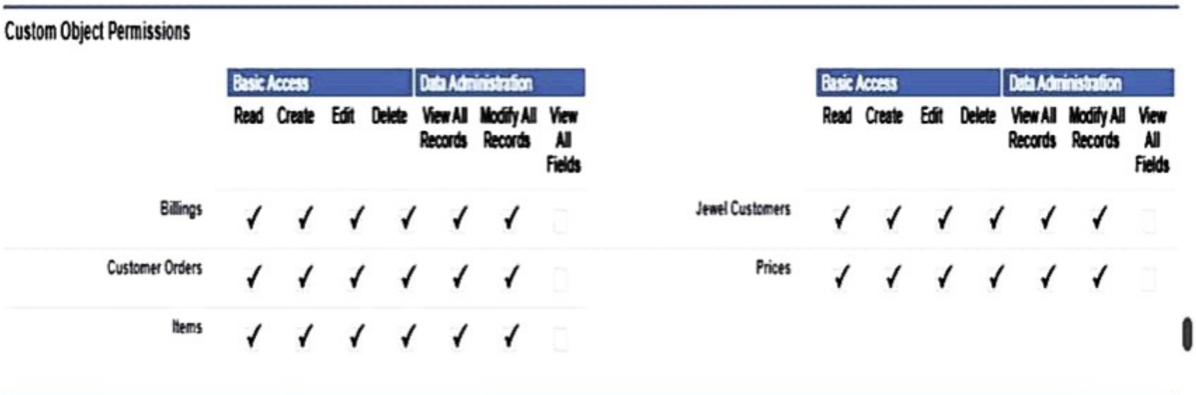


SelectthisinCustomObject Permissions

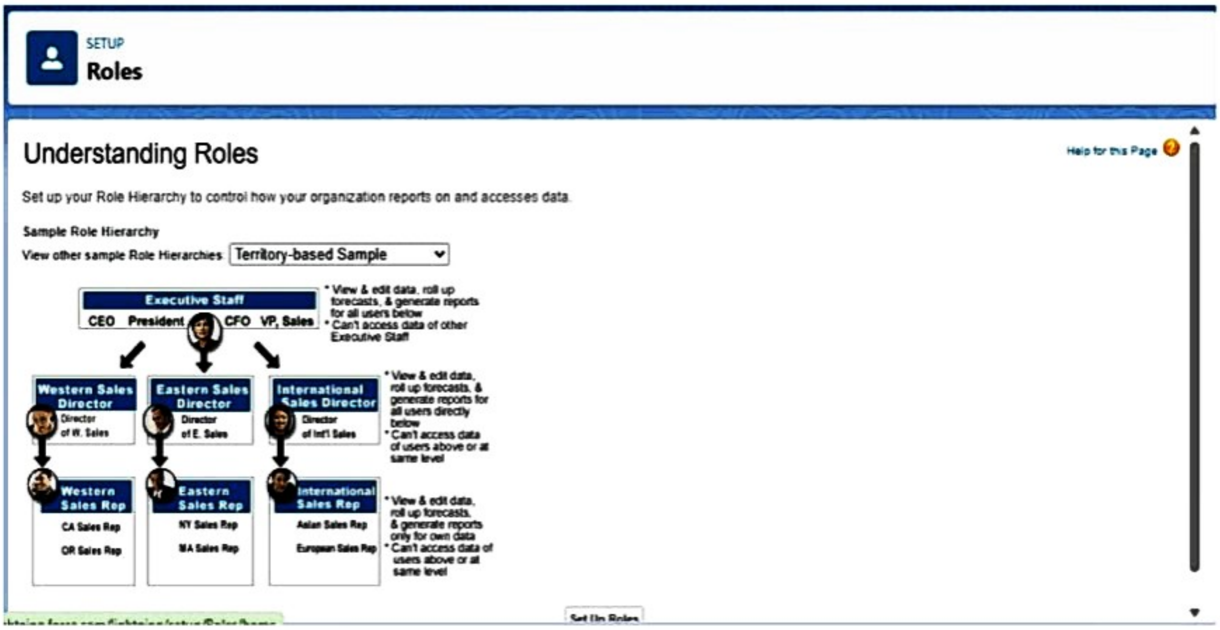
V . CreateaWorker Profile



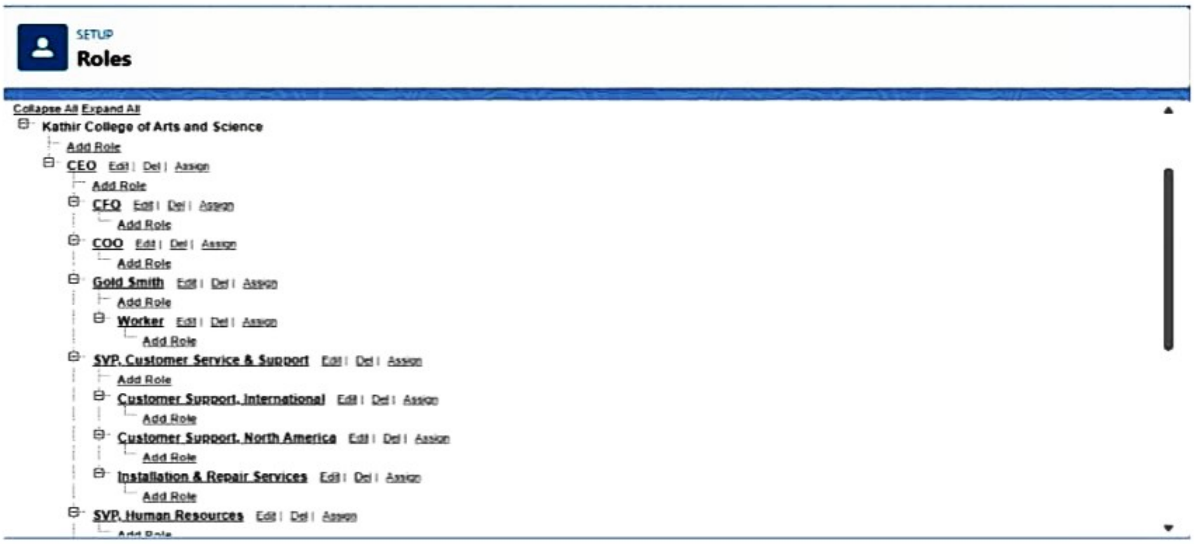
SelectthisinCustomObjectPermissions



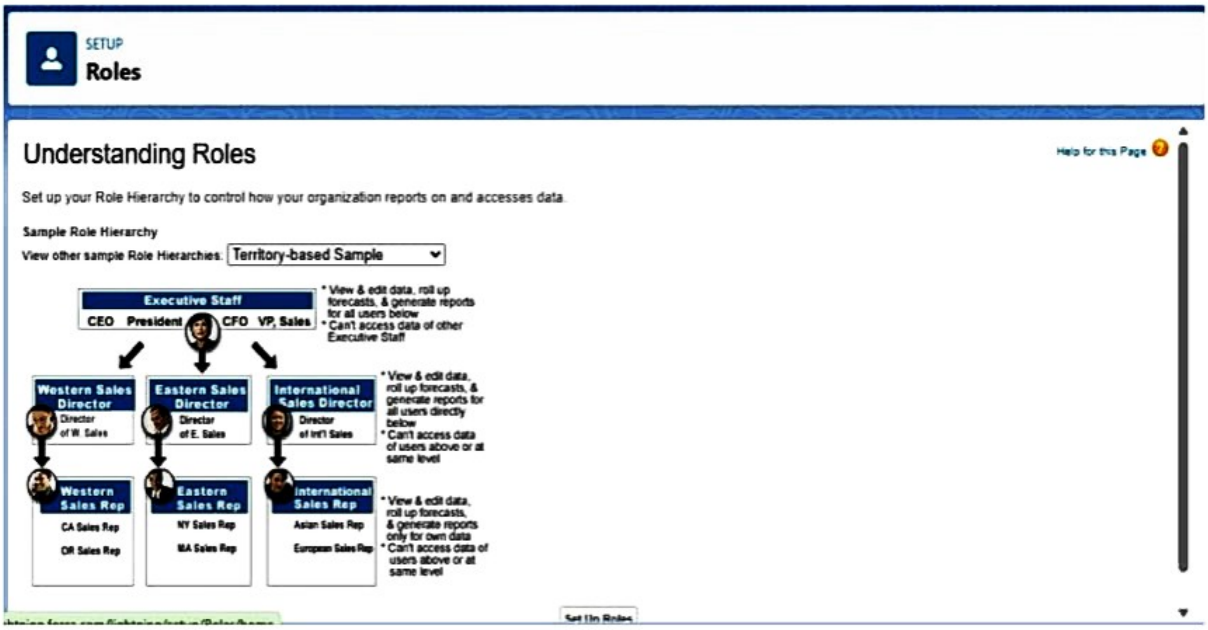
VI . CreatingRolefor GoldSmith



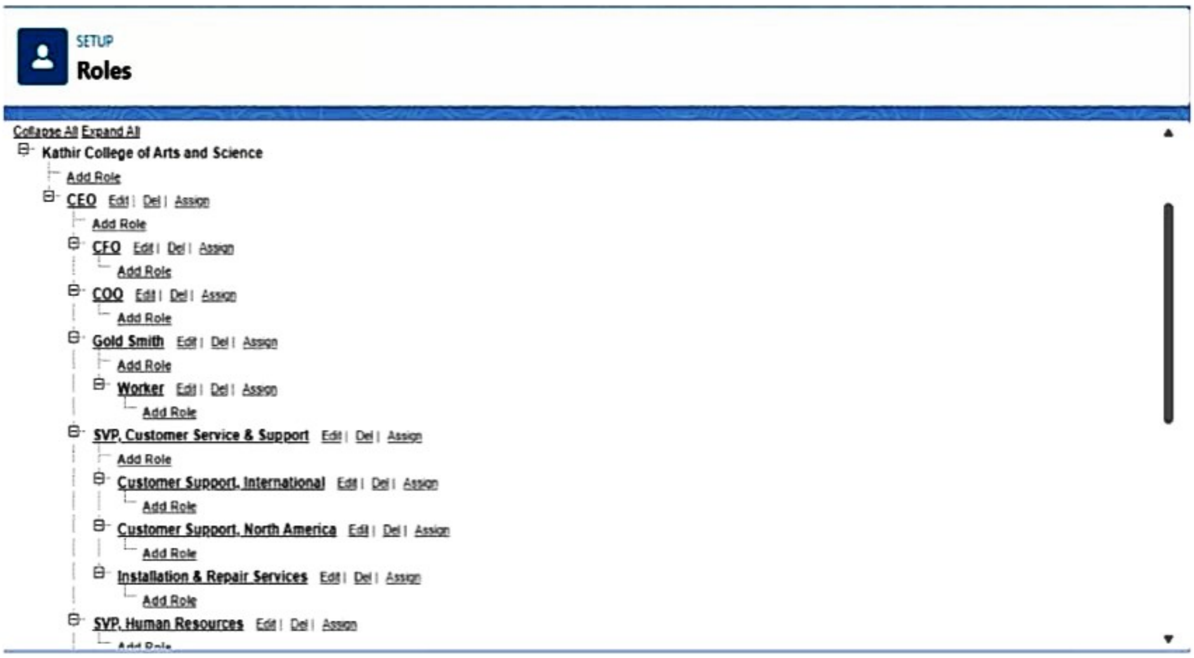
- RoleisCreatedforGold Smith



VII . CreatingRolefor Worker

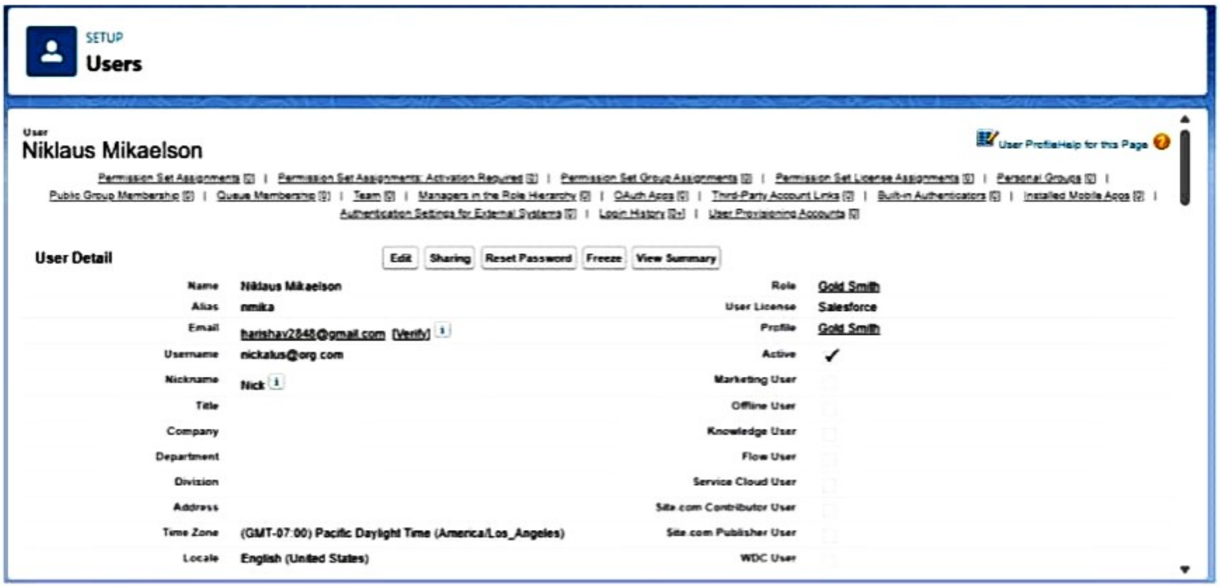


- RoleisCreatedforWorker

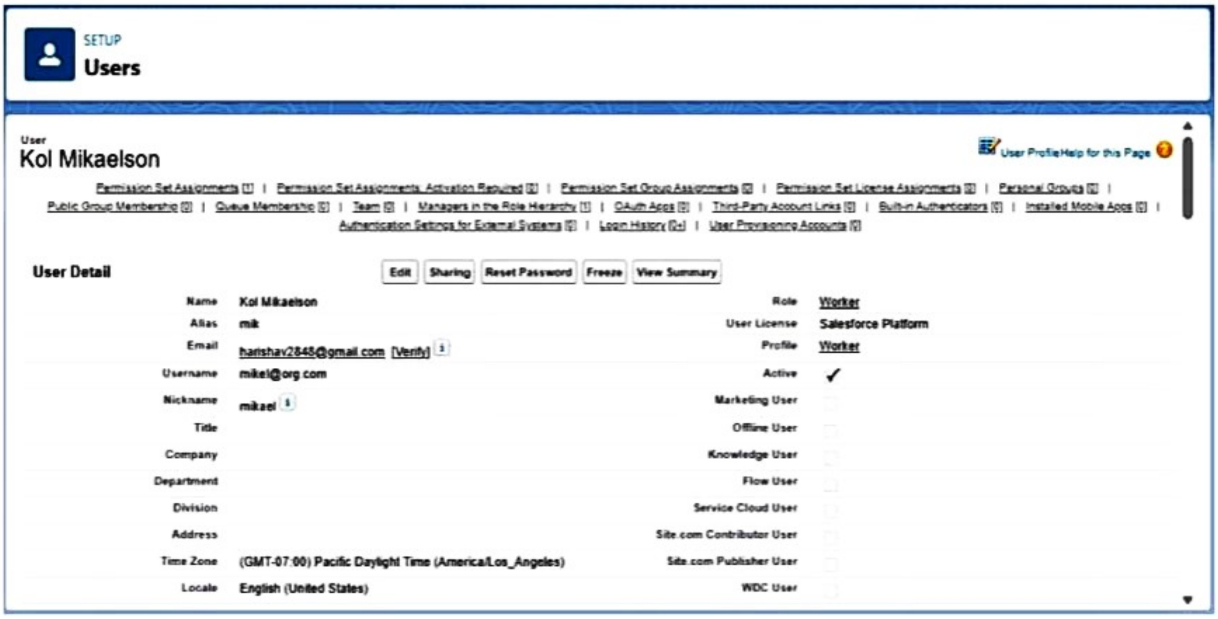


VIII . CreatingUser

- CreatinguserwiththeRoleasaGoldSmith



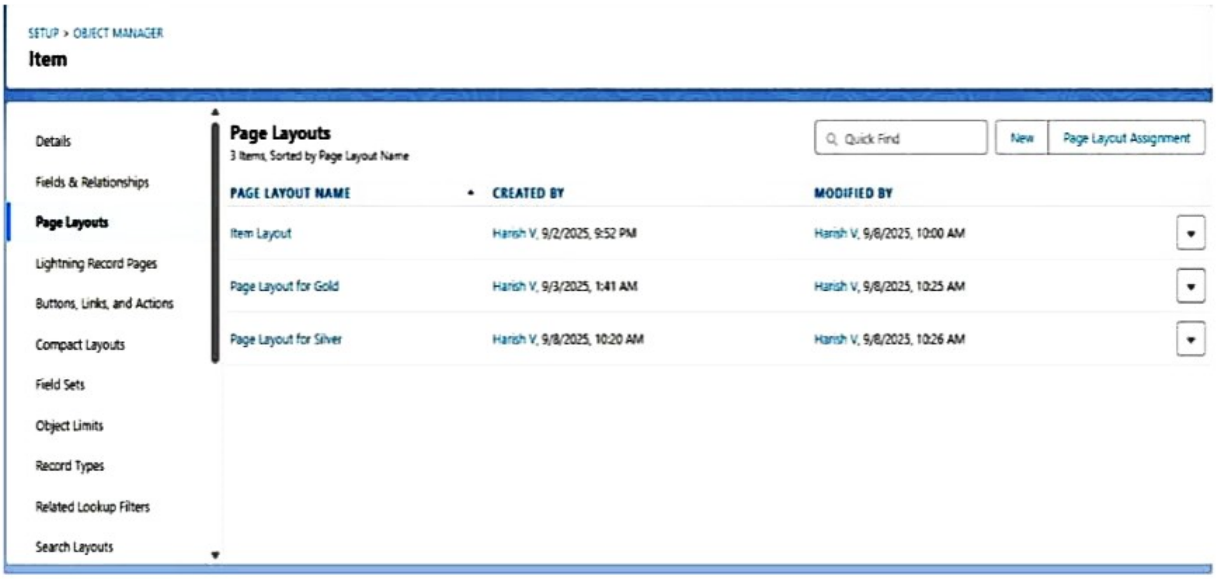
- CreatinguserwiththeRoleasa Worker

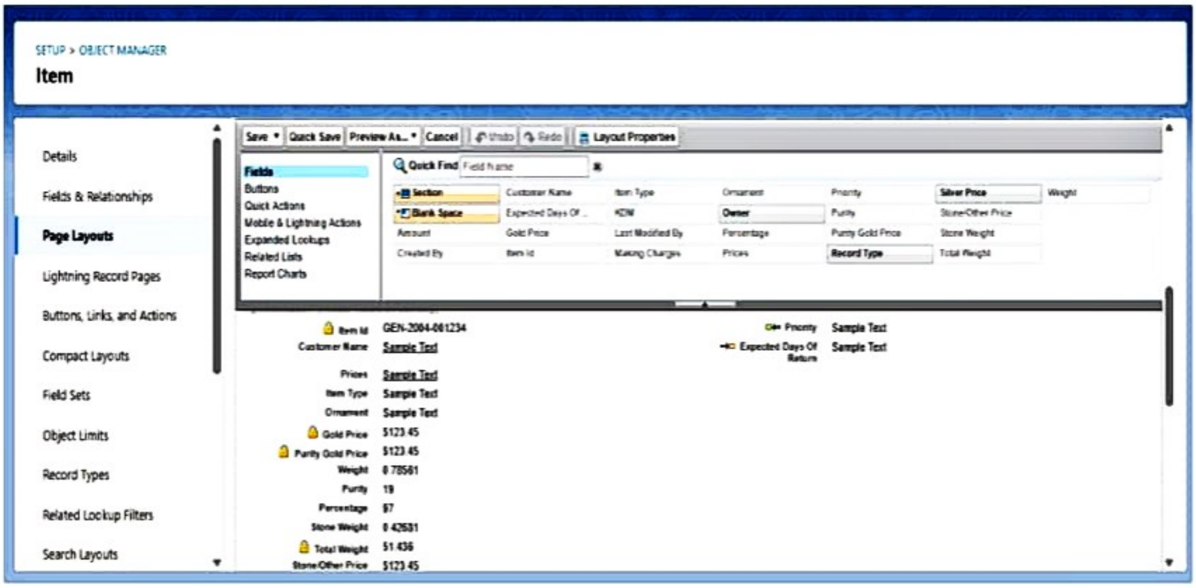


- Createtwomoreusersaswiththesameroleasworker

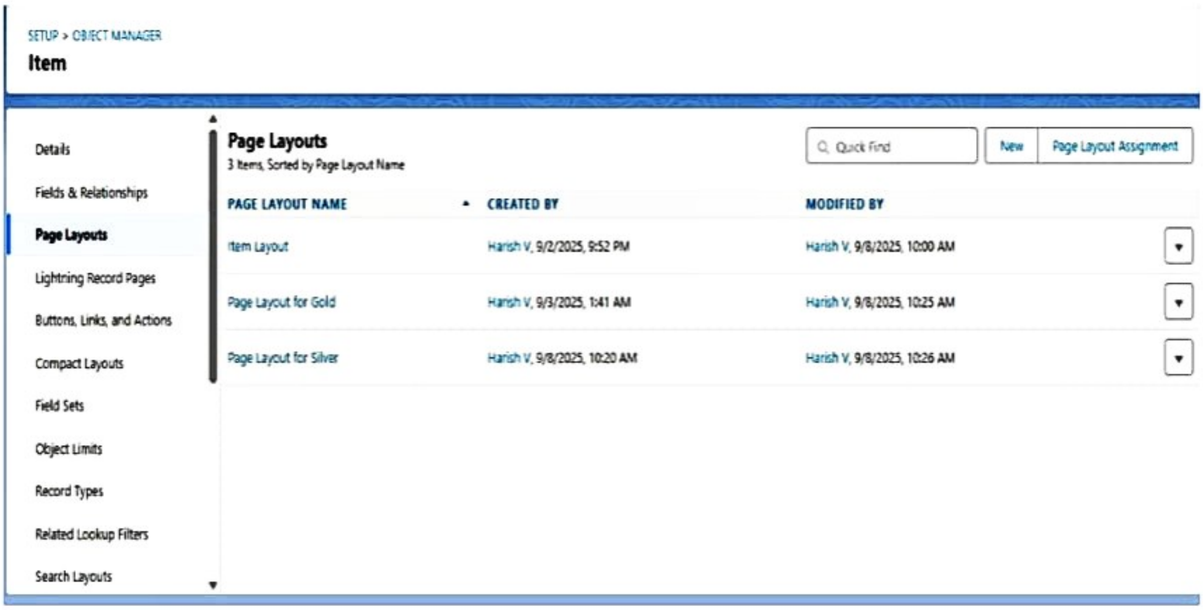
IX . CreatingPageLayouts

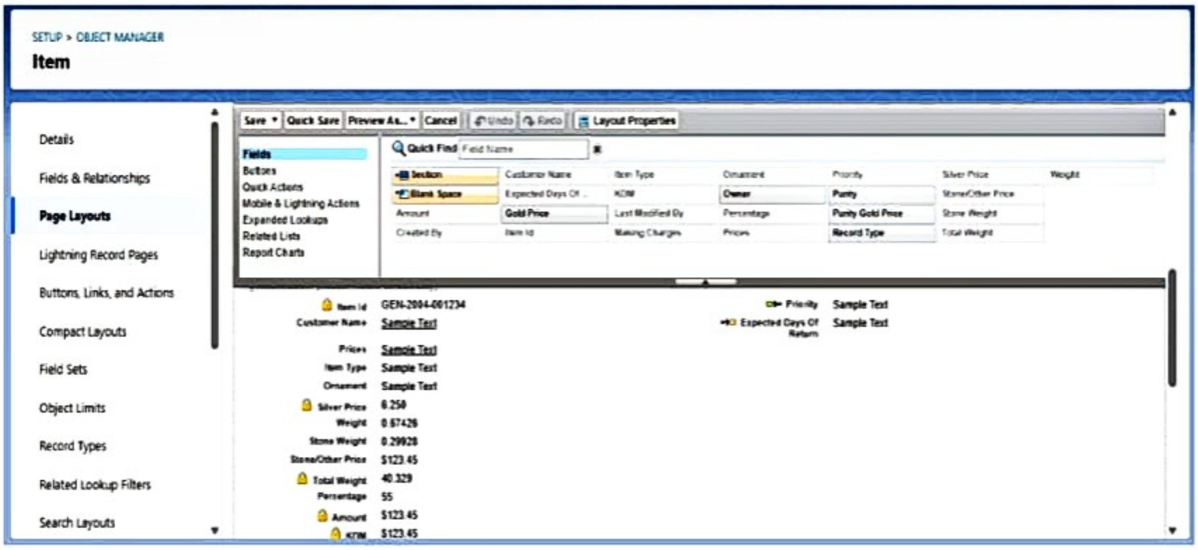
- Creat ingpa ge La yo ut forGold





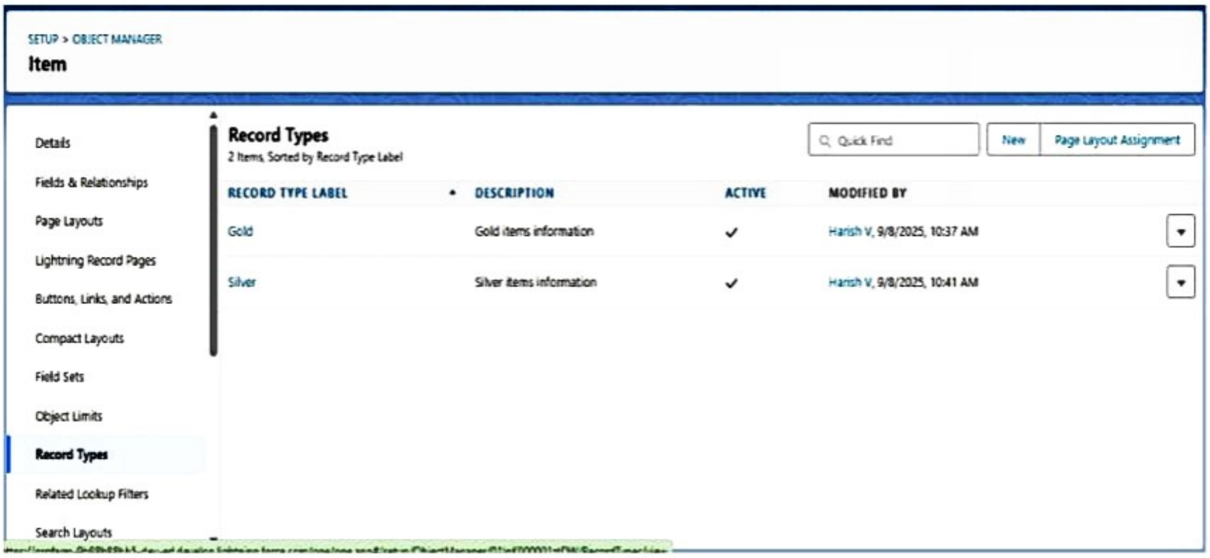
o CreatingpageLayoutfor Silver

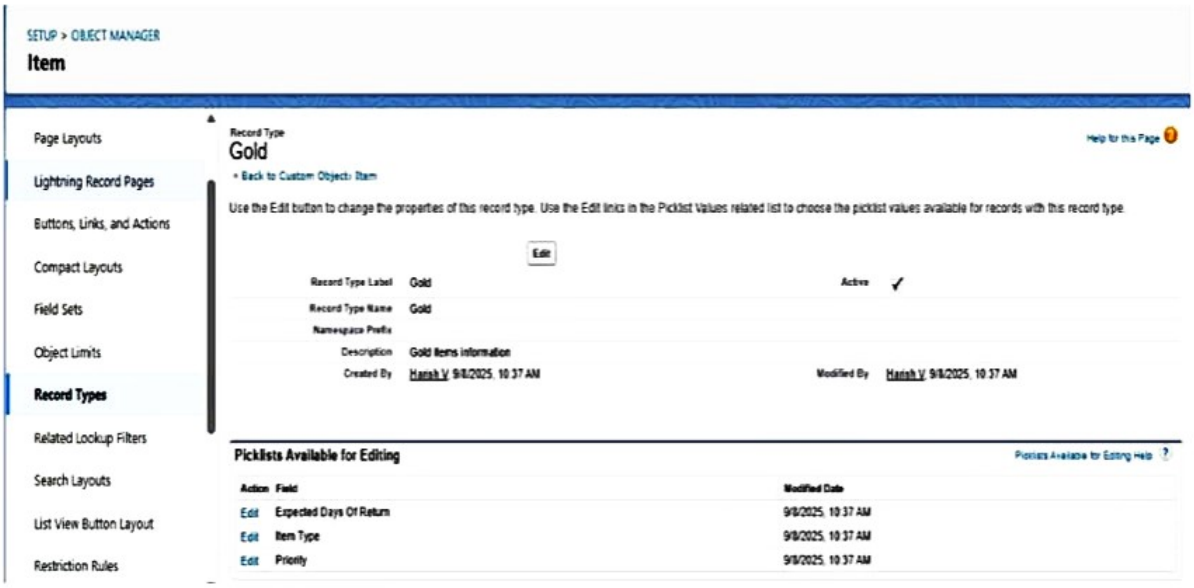




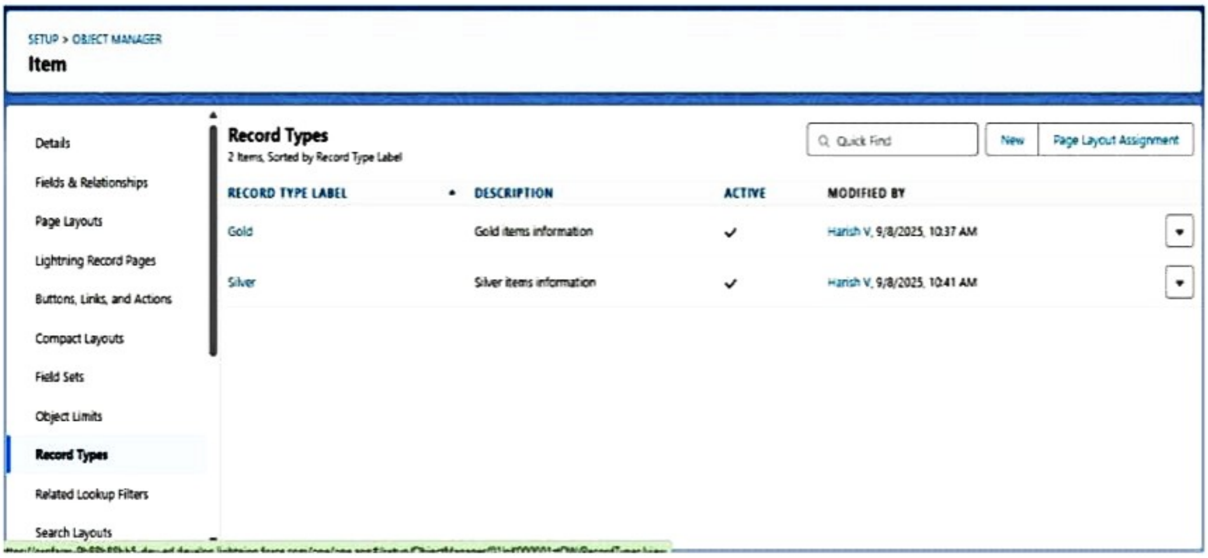
X . CreatingRecordType

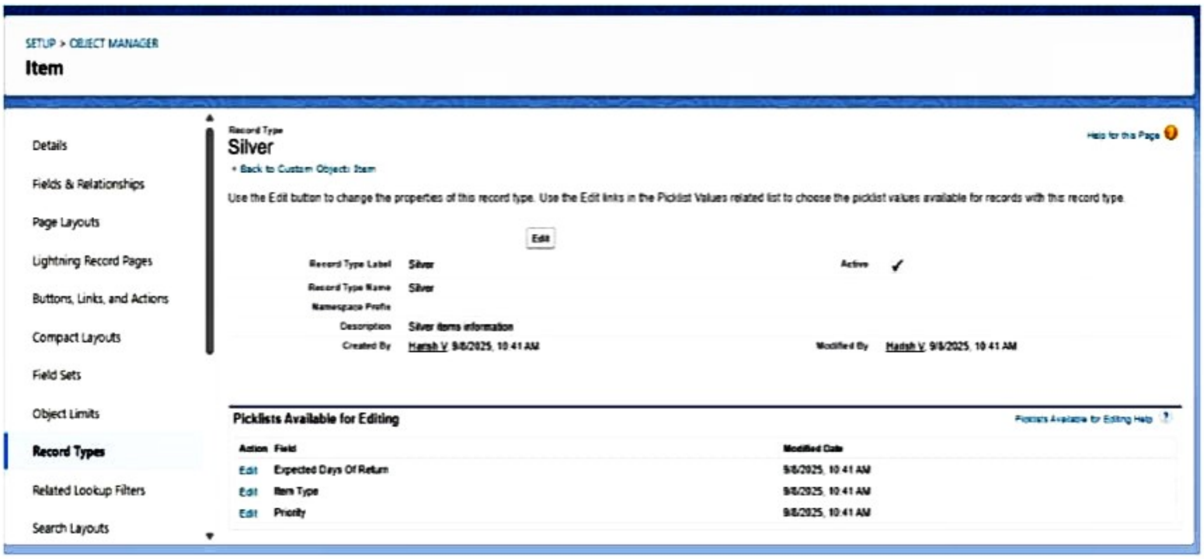
- Createrecordt ype fo rGold



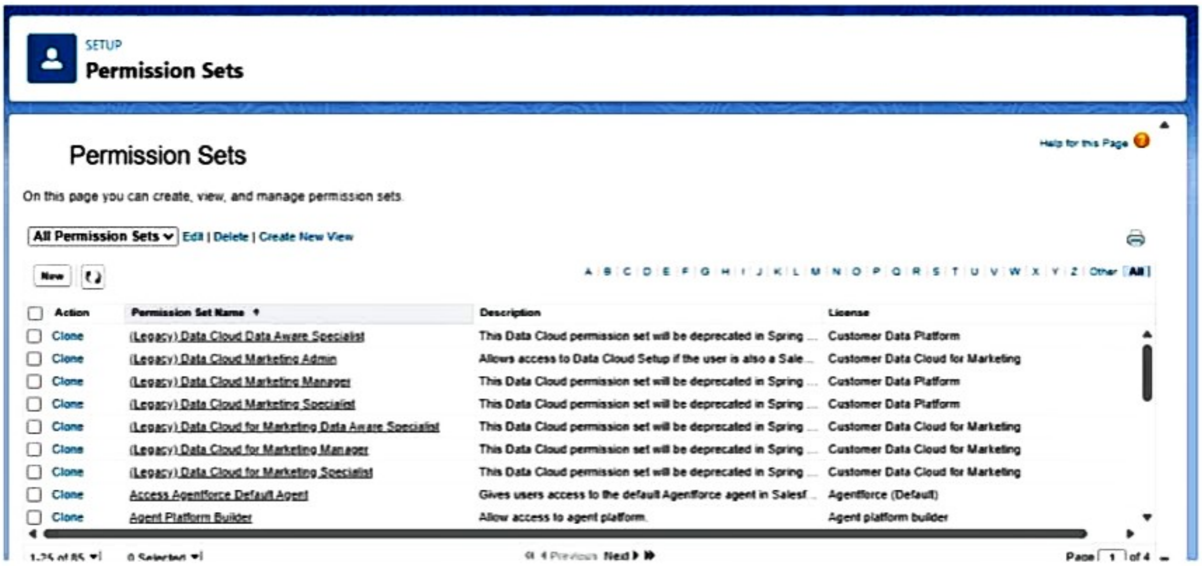


 CreateRecordtypefor Silver

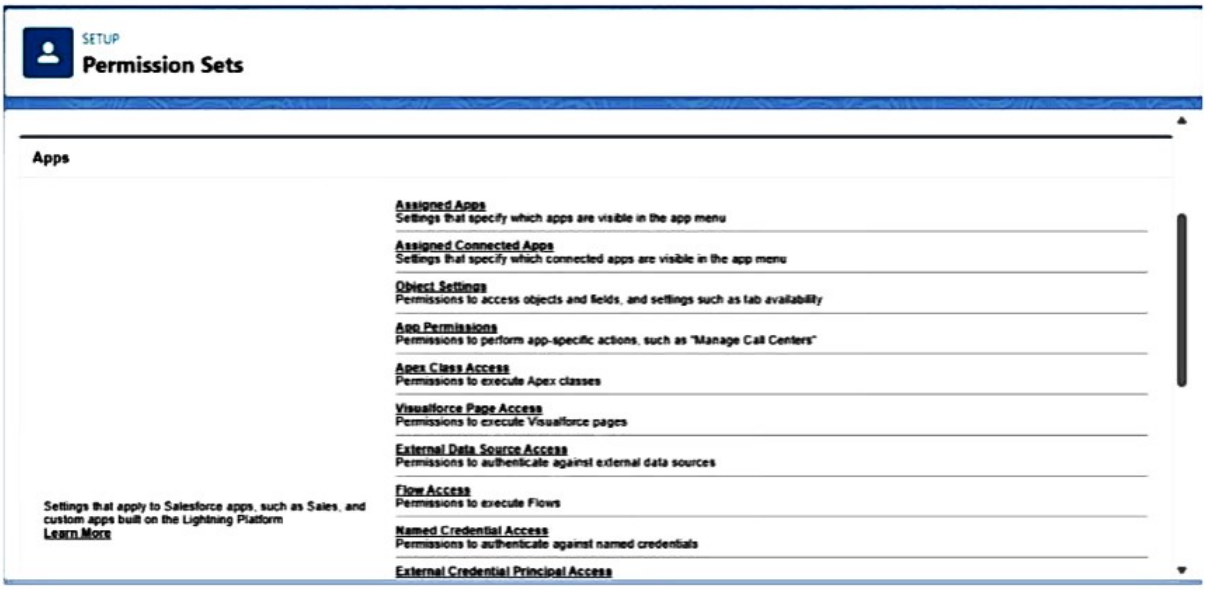




XI . Creatingpermissionset

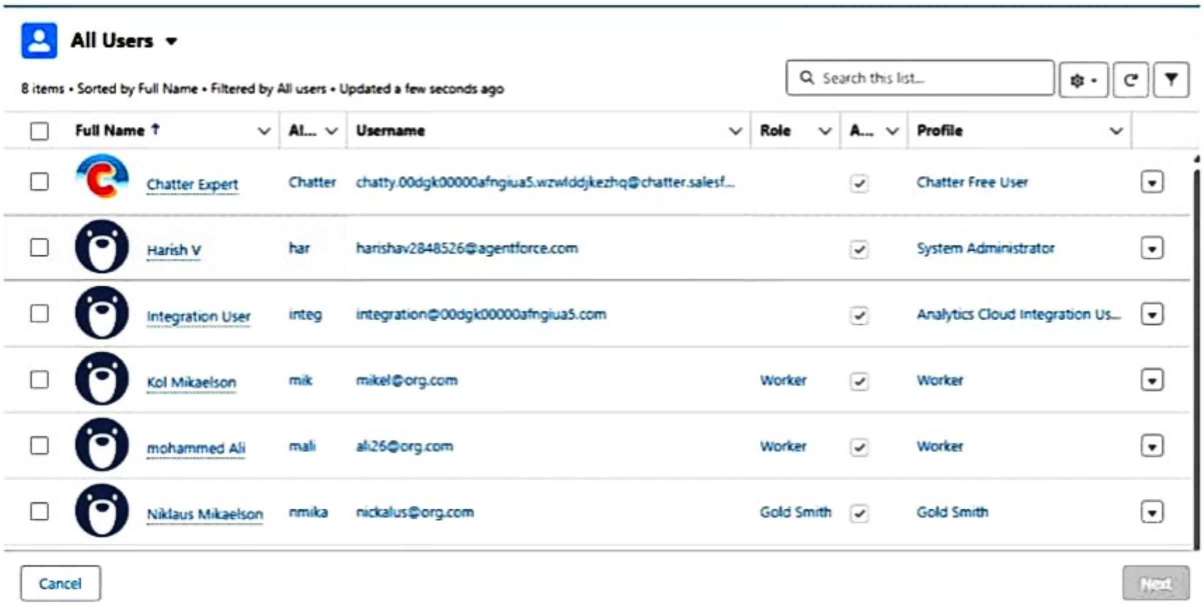


- CreatealabelnameasaPerto worker

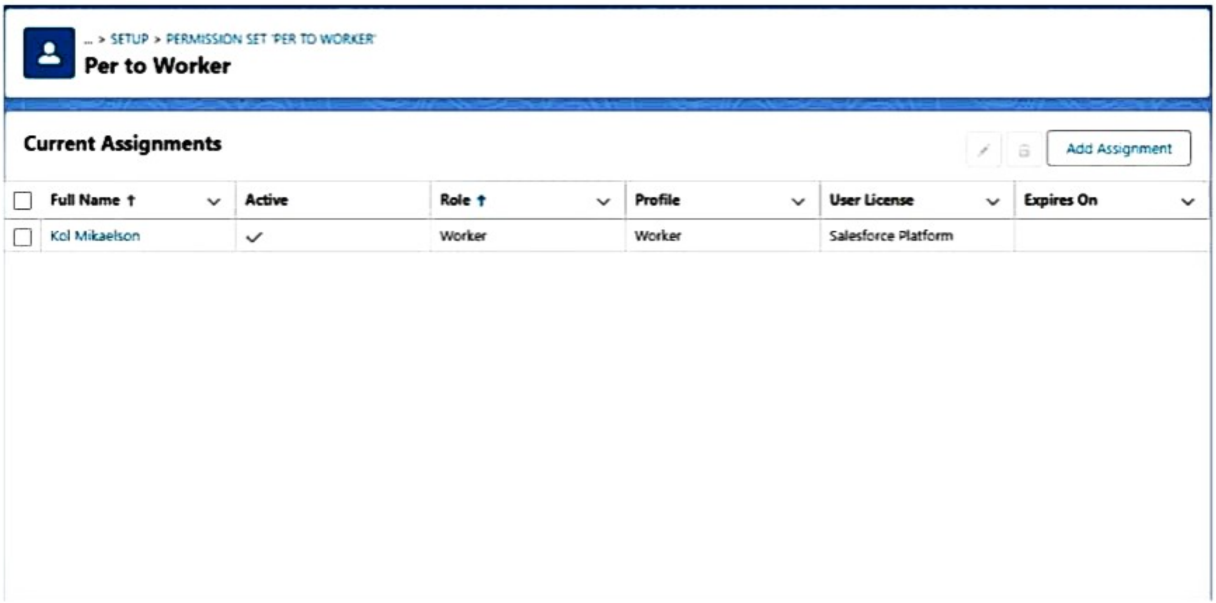


- ThenClickontheObject Setting.
- E nab let heGo lda ndS ilver inobject per mis s ion.

- Clickonsavethepermissionandclickonthe Manageassignment
- NowclickontheAdd Assignment.

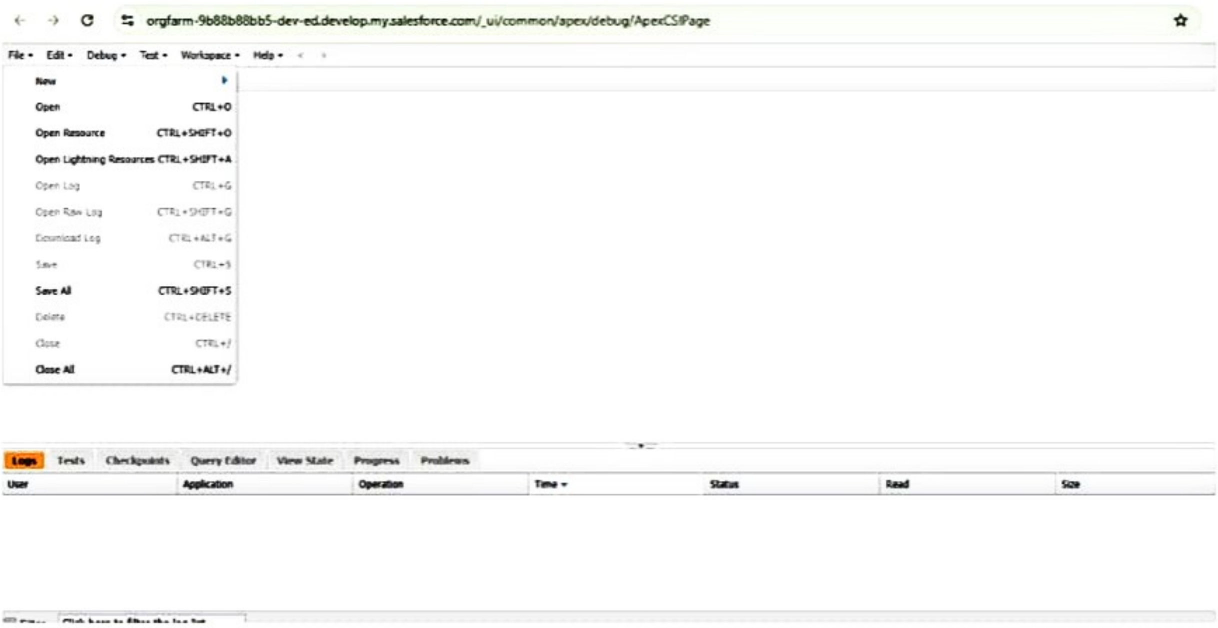


- Selecttheuseryoucreatedinthepreviousmilestone.
- Thenclickonnextand clickonAssign.

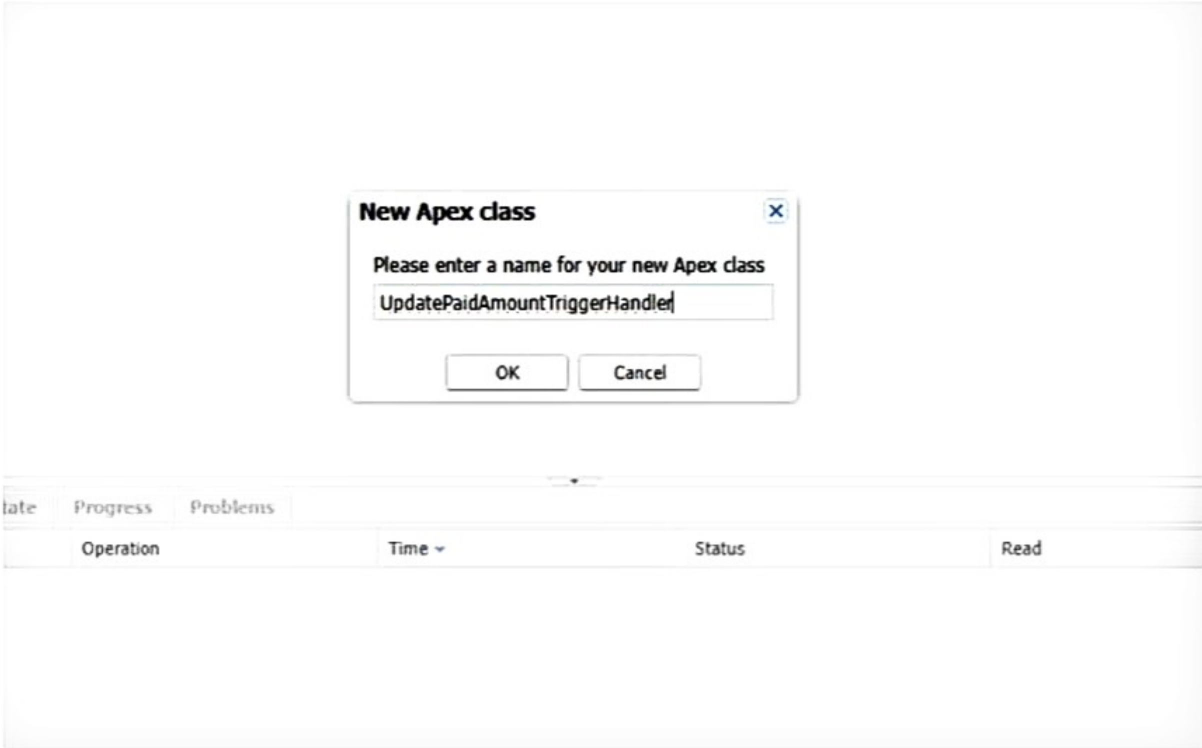


XII . Creating Trigger

- ☐ OpentheDeveloperConsoleinnewtab



- ☐ ClickOnfileSelect “NEW”.
- ☐ Selectthefileas“Apex Classes”
- ☐ EntertheNameas“UpdatePaidAmountTriggerHandler”

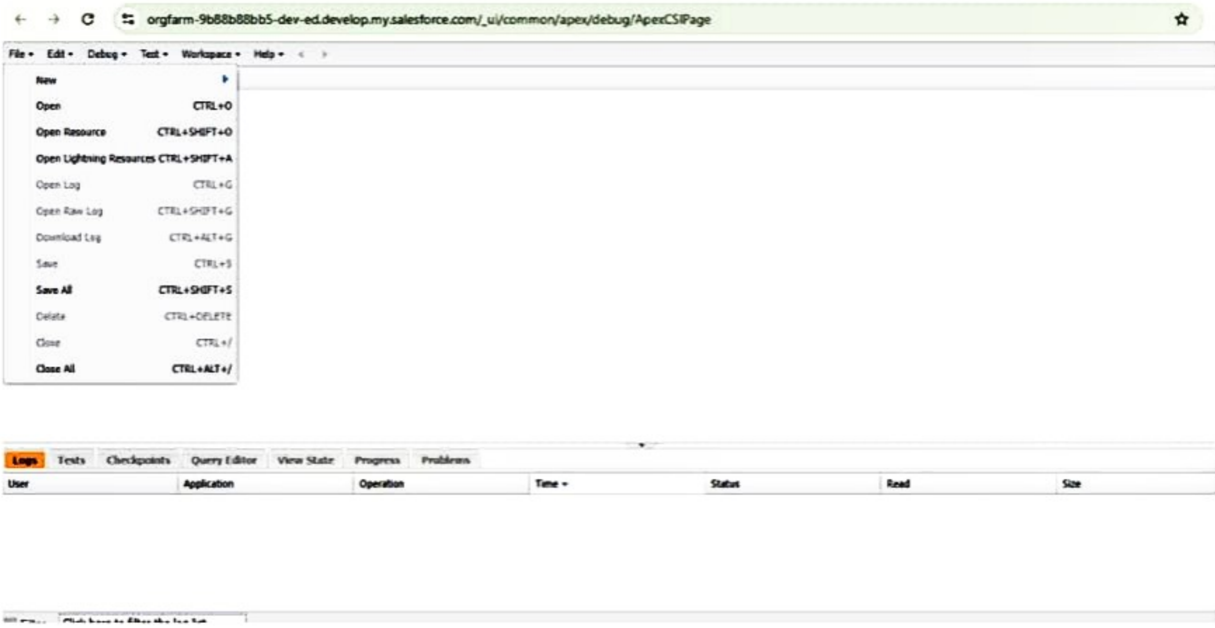


- InthisApexClassEntertheCodegivenbelow:

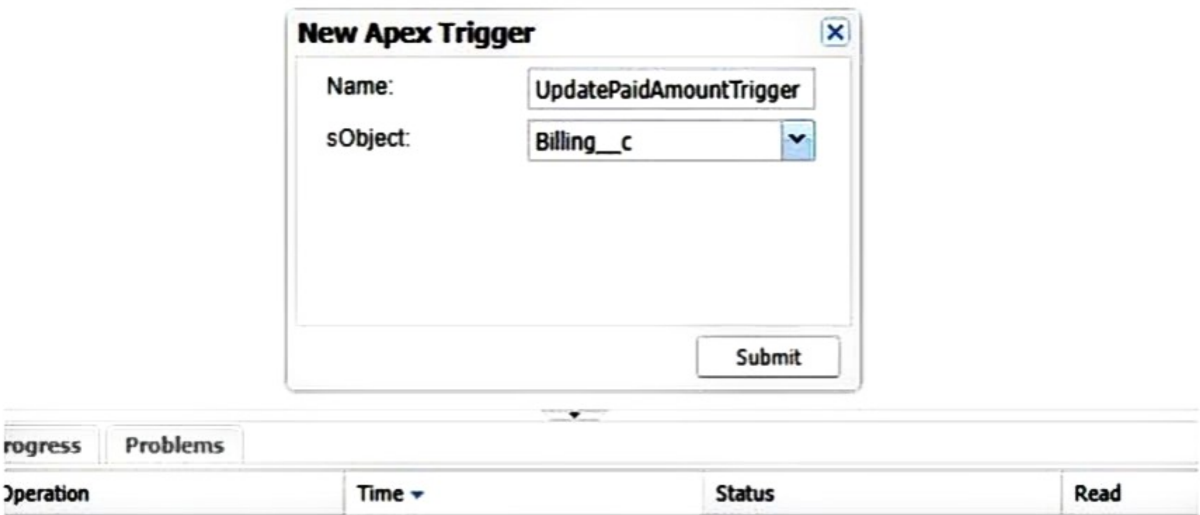
```
publicclassUpdatePaidAmountTriggerHandler{
  public static void handleBeforeInsert(List<Billing__c> newBillings) {
    for (Billing__c billing : newBillings) {
      billing.Paid_Amount__c = billing.Paying_Amount__c;
    }
  }

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

```
}
```

CreateaanotherTriggerwiththe"ApexTrigger"



- ☐ ClickOnfileSelect "NEW"
- ☐ Selectthefileas"Apex Trigger"
- ☐ EntertheNameas"UpdatePaidAmountTriggerHandler. SelecttheObjectas"Billing_c"
- ☐



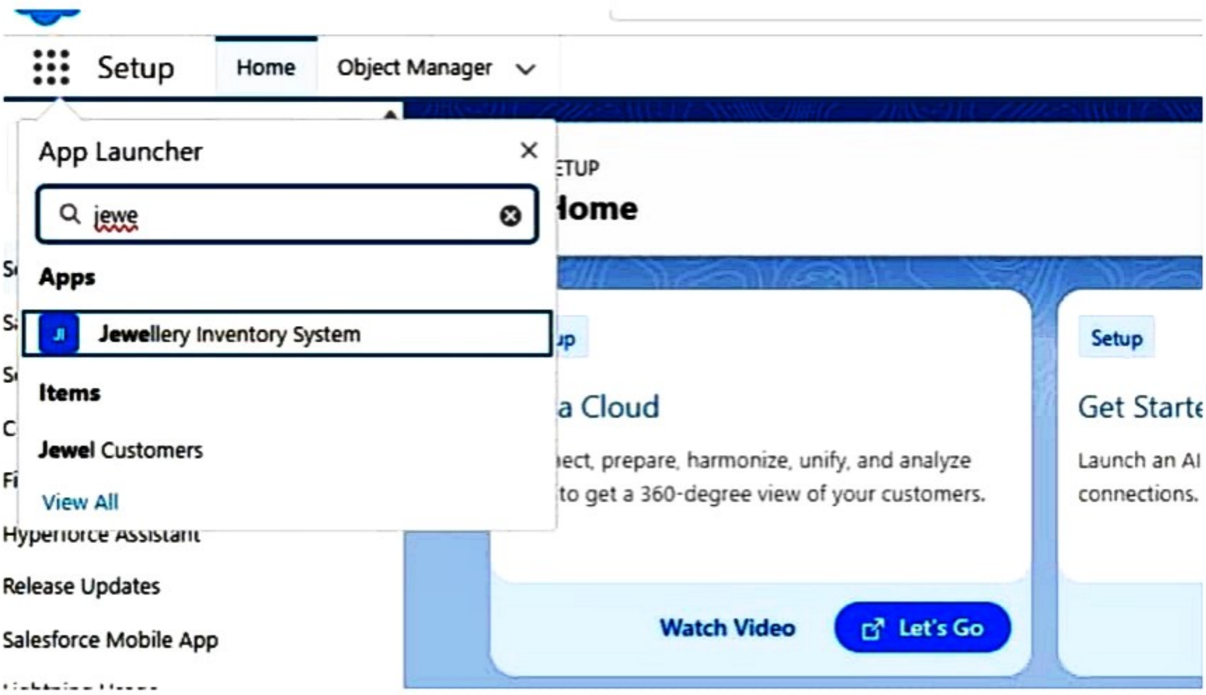
- Enterthecodegivenbelow:

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

XIII . User Adoption

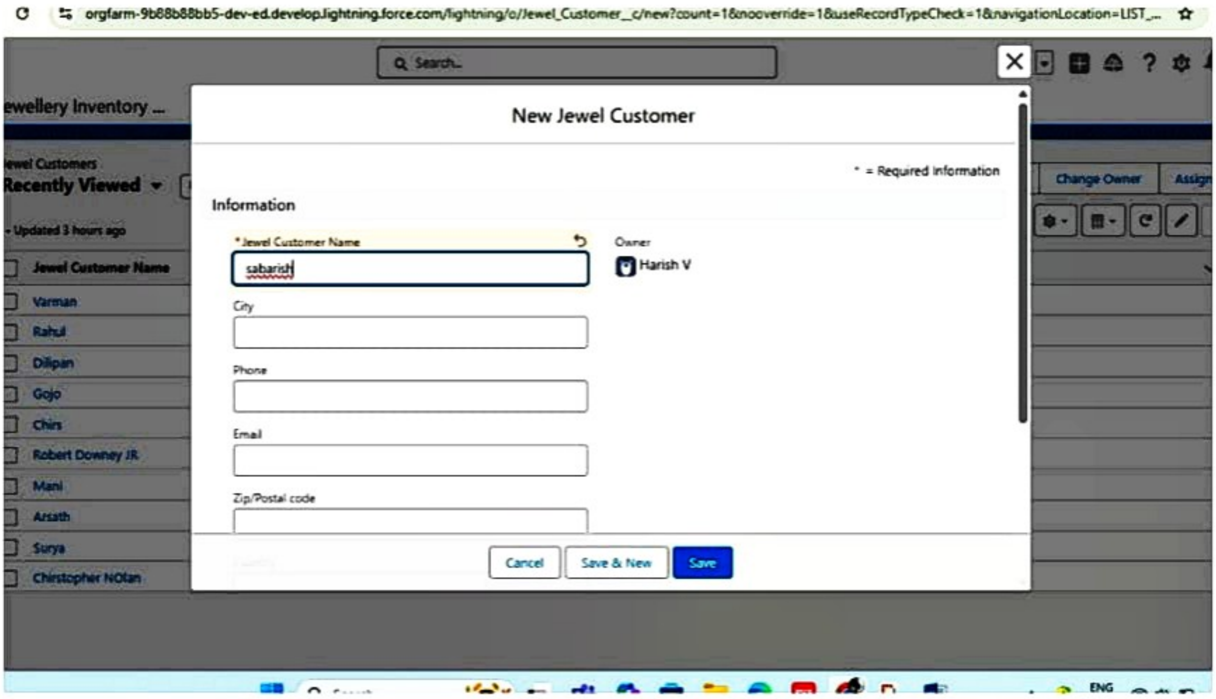
CreateaRecord(JewelCustomer)

- ClickonApplauncher.
- SearchJewelryInventorySystem&clickon it.



XIV . View theJewelryCustomer

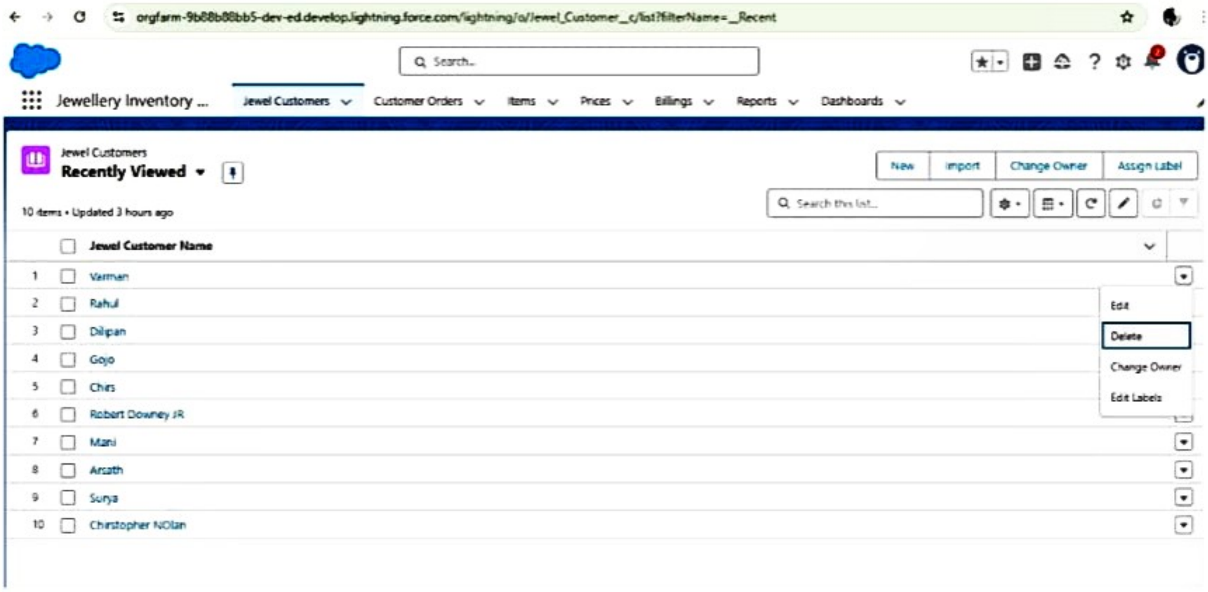
- ClickontheJewelCustomer Tab.
- Clickon “NEW”
- Clickonanyrecordname.youcanseethedetailsoftheJewelCustomer.



- FilltheDetailsincorrespondingColumns.
- T he nc licko nsave.

XV . DeleteaRecord(Jewel Customer)

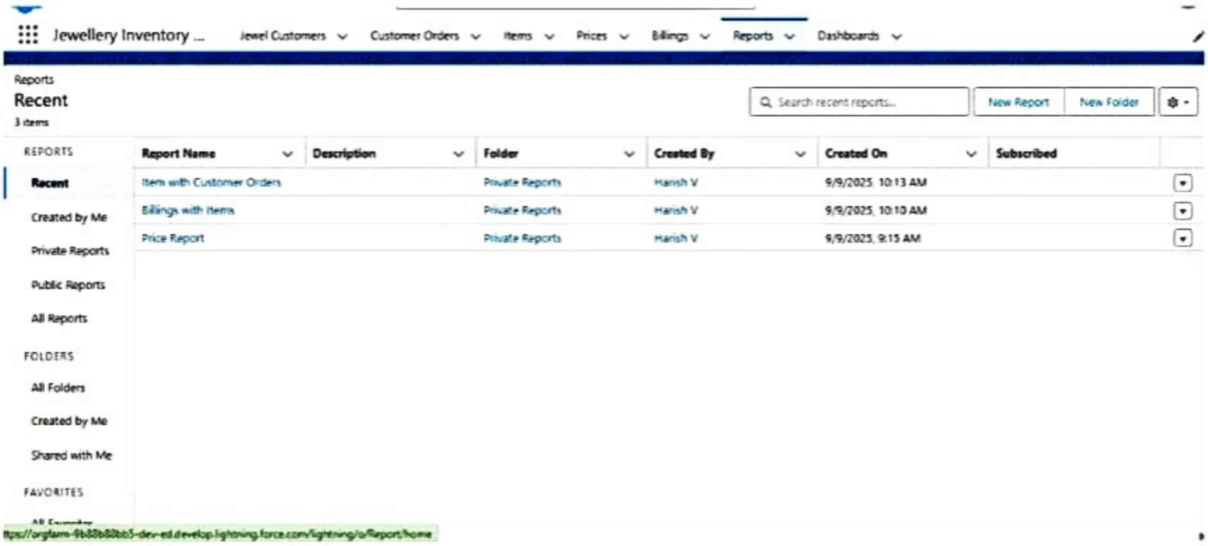
- Selectarecordwhichiswanttodelete



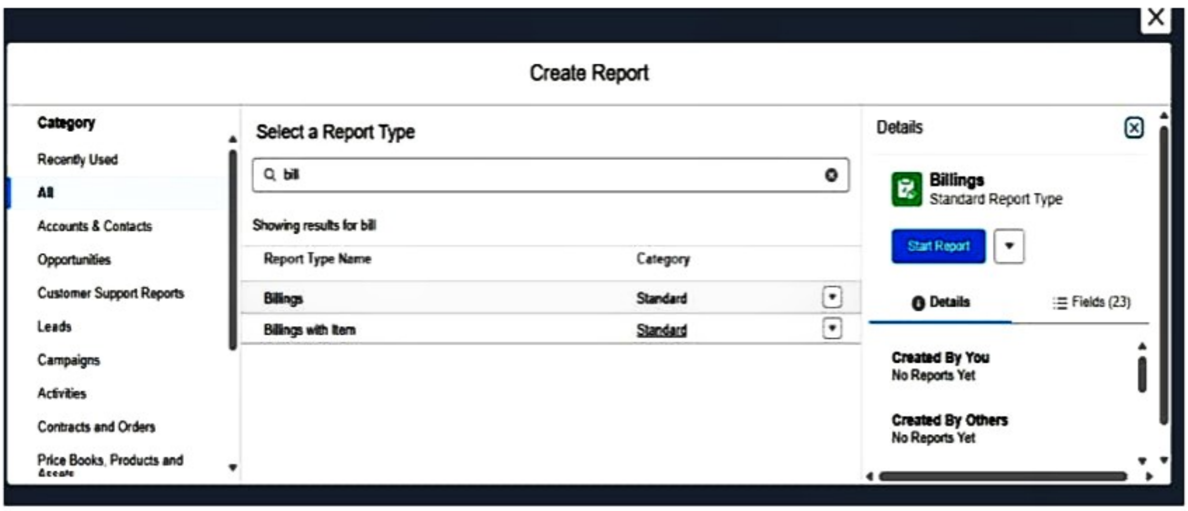
- ClickonDeletetodeletetheRecord

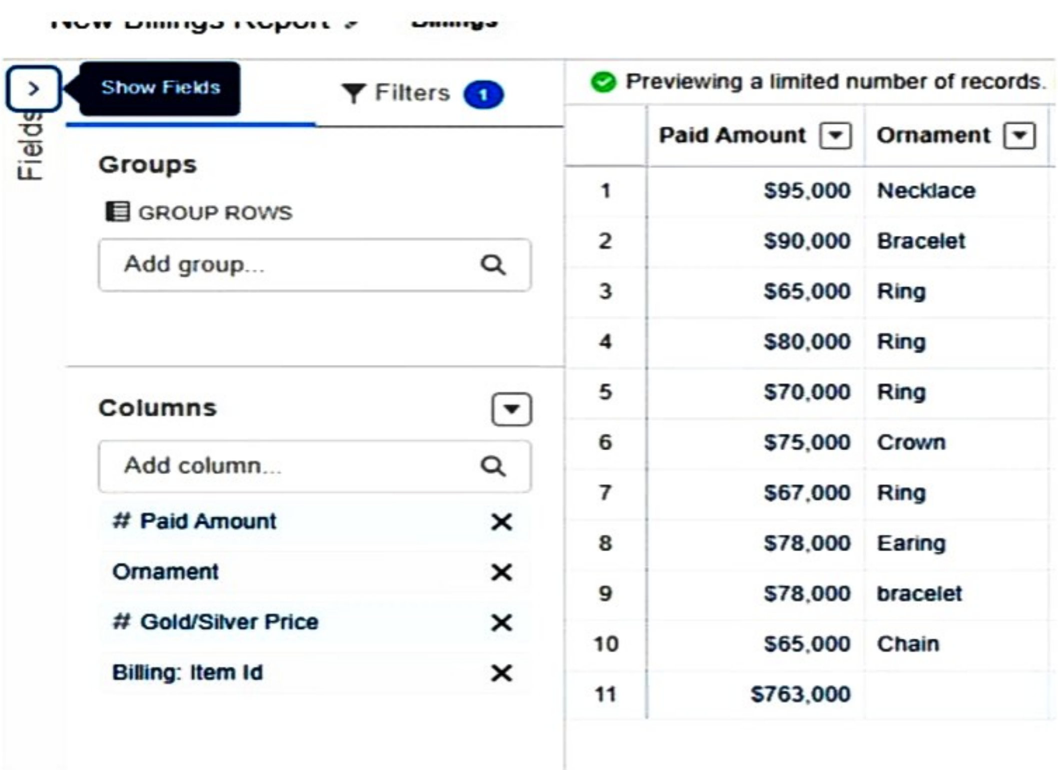
XVI . CreateReport

- Gototheappandclickonthereports tab
- ClickNew Report



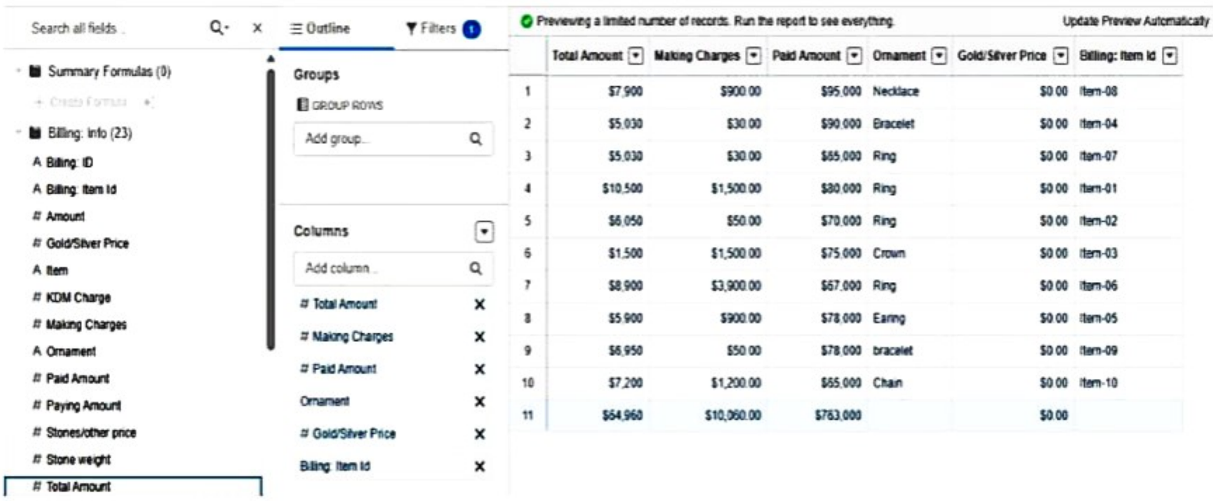
- Clickon"NEWREPORT".
- Se lectRecordt ypeasobject we created.
- ThenclickonStartReport.





☐ InthefieldsSelecttheObjectyouwantshowintheColumn☐

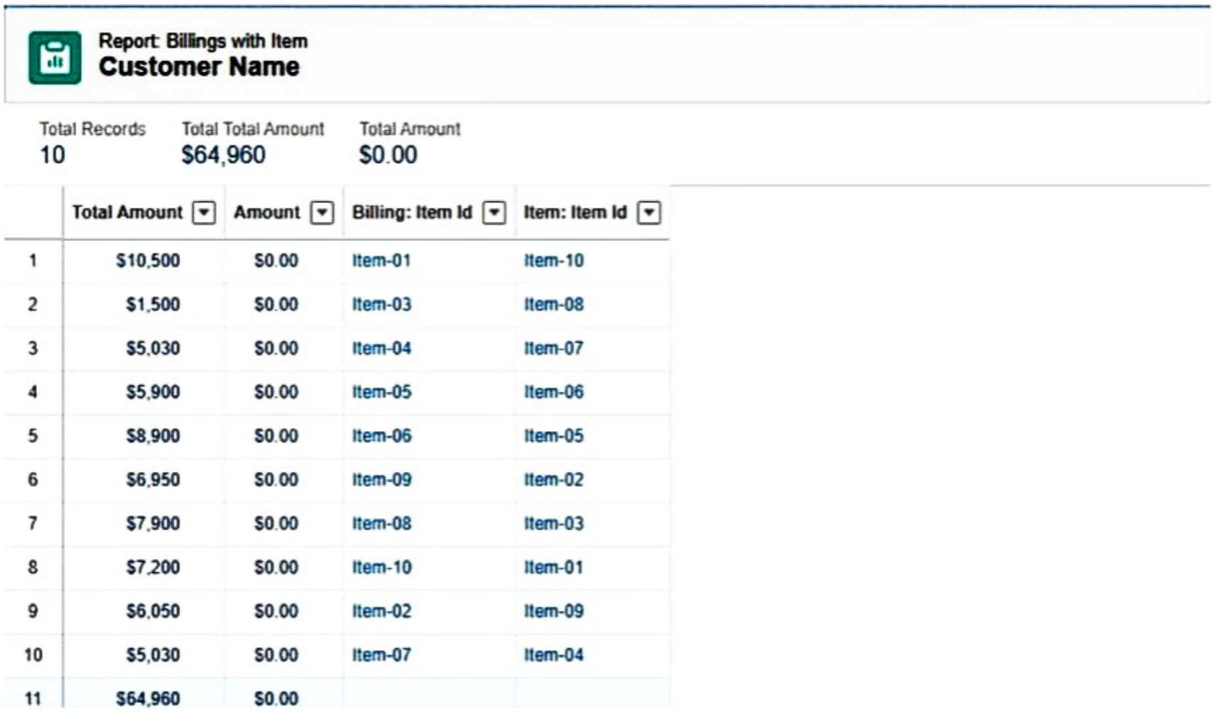
.



☐ ClickonSaveandrun.☐

.

- EntertheReportNameandClickon save.
- Thereportshowlikethisintheimage below.


Report: Billings with Item

Customer Name

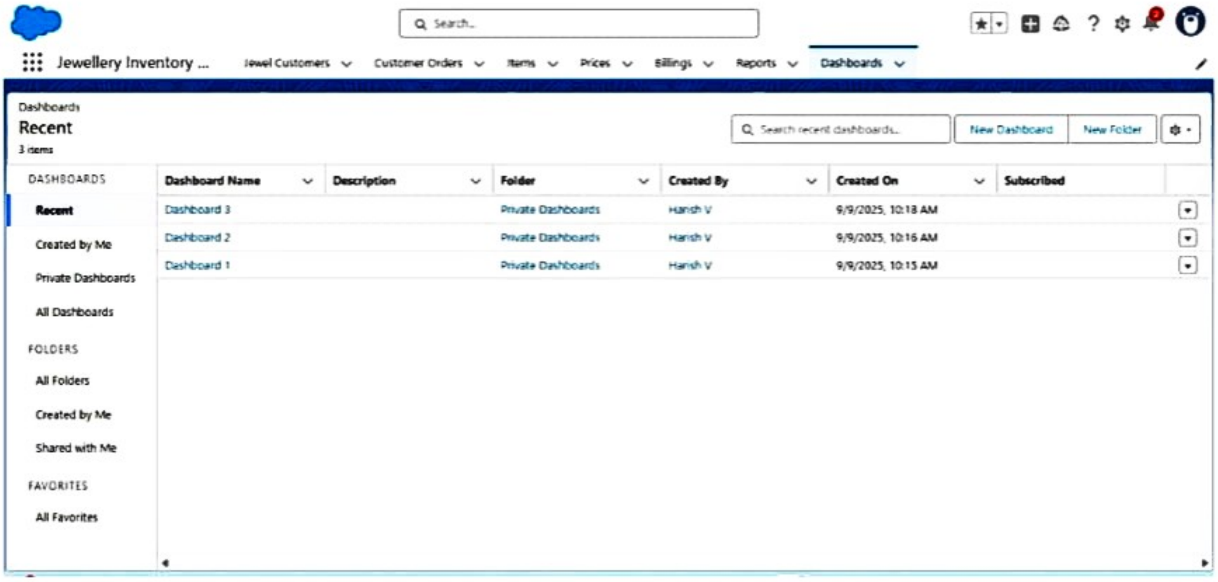
Total Records	Total Total Amount	Total Amount
10	$64,960	$0.00

	Total Amount	Amount	Billing: Item Id	Item: Item Id
1	$10,500	$0.00	Item-01	Item-10
2	$1,500	$0.00	Item-03	Item-08
3	$5,030	$0.00	Item-04	Item-07
4	$5,900	$0.00	Item-05	Item-06
5	$8,900	$0.00	Item-06	Item-05
6	$6,950	$0.00	Item-09	Item-02
7	$7,900	$0.00	Item-08	Item-03
8	$7,200	$0.00	Item-10	Item-01
9	$6,050	$0.00	Item-02	Item-09
10	$5,030	$0.00	Item-07	Item-04
11	$64,960	$0.00		

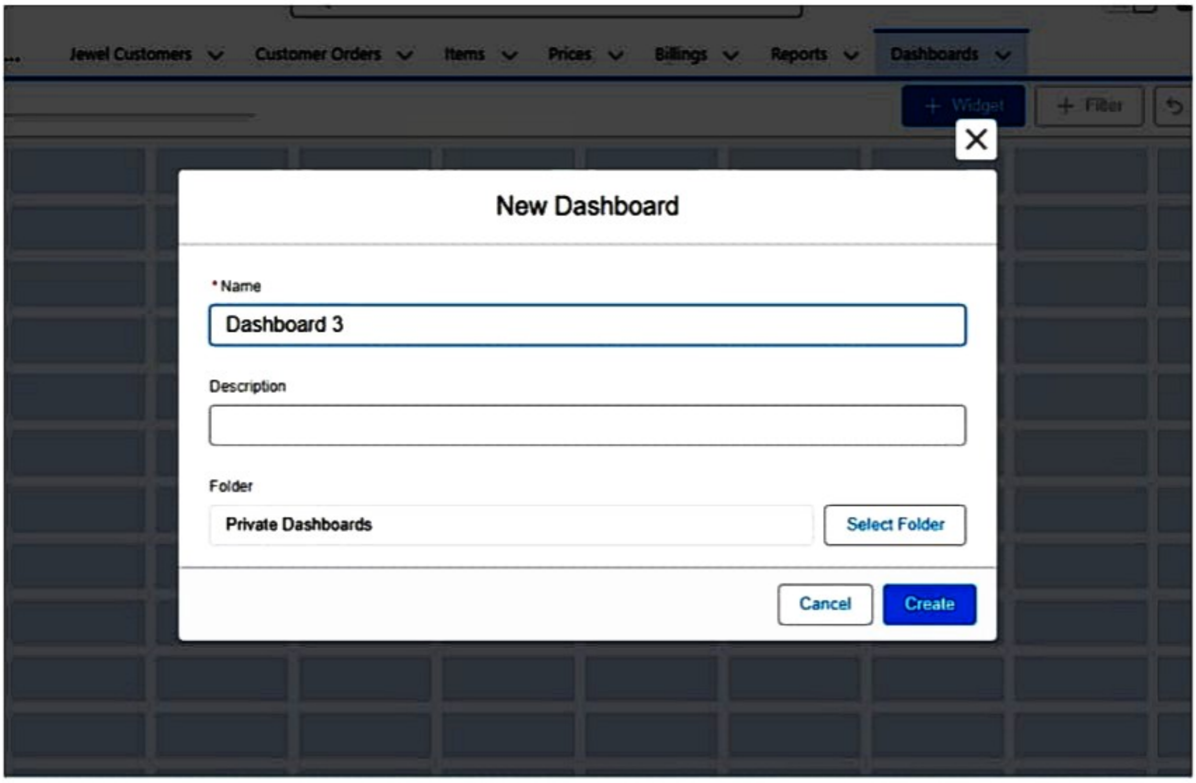
- Createaanothertworecord.
- Followthesamesteps.
- Recordtypeas:
  1. Itemwith Billings.
  2. BillingswithitemandCustomerorder.

XVII . Creating a Dashboard

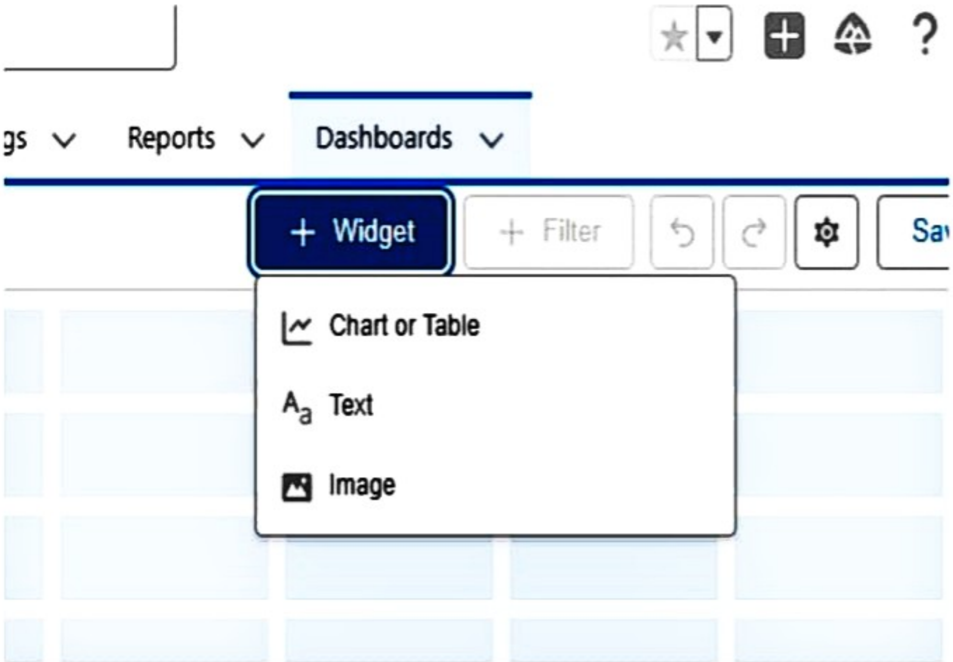
- GototheappclickontheDashboardstabs.



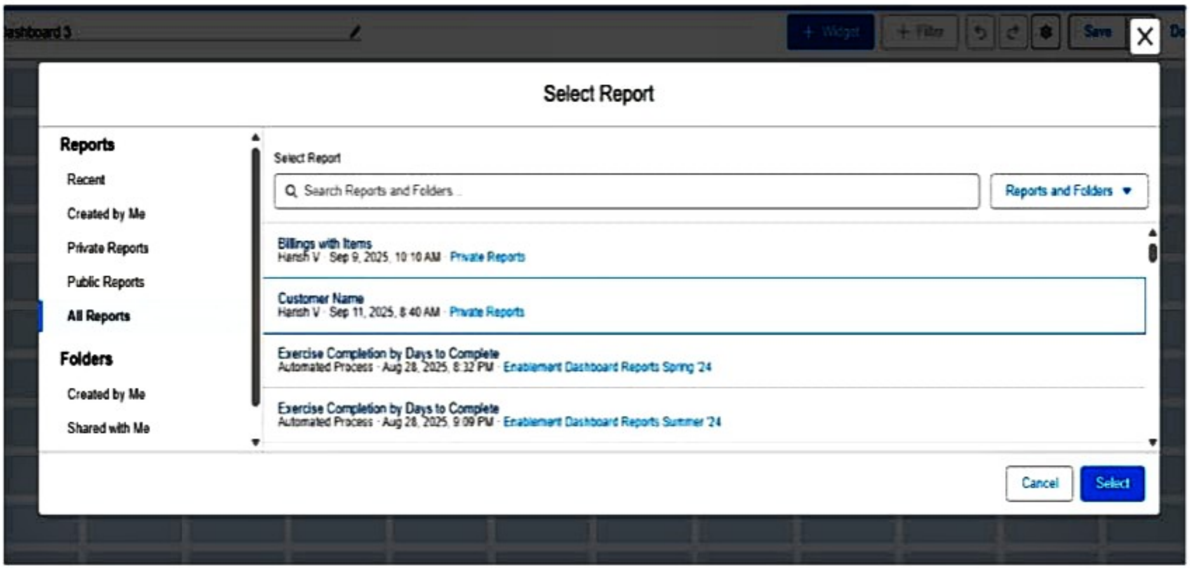
- Clickon"NEWDashboard".
- EntertheNameas"Dashboard1".
- Clickon Create.



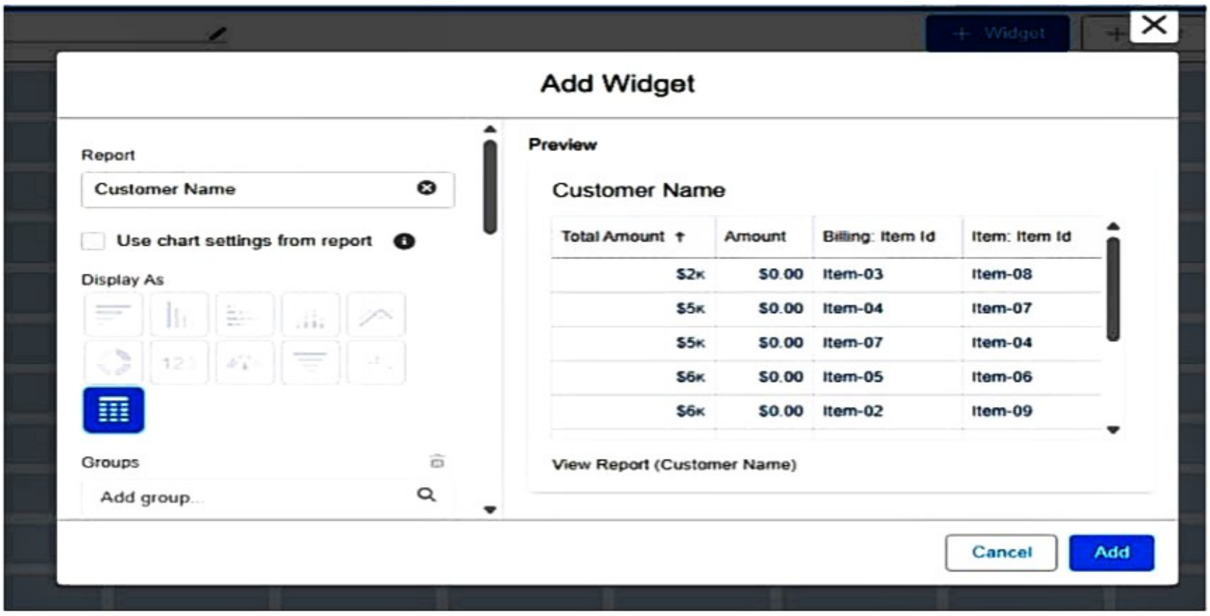
☐ ClickonWidgetandSelectChatandtables.

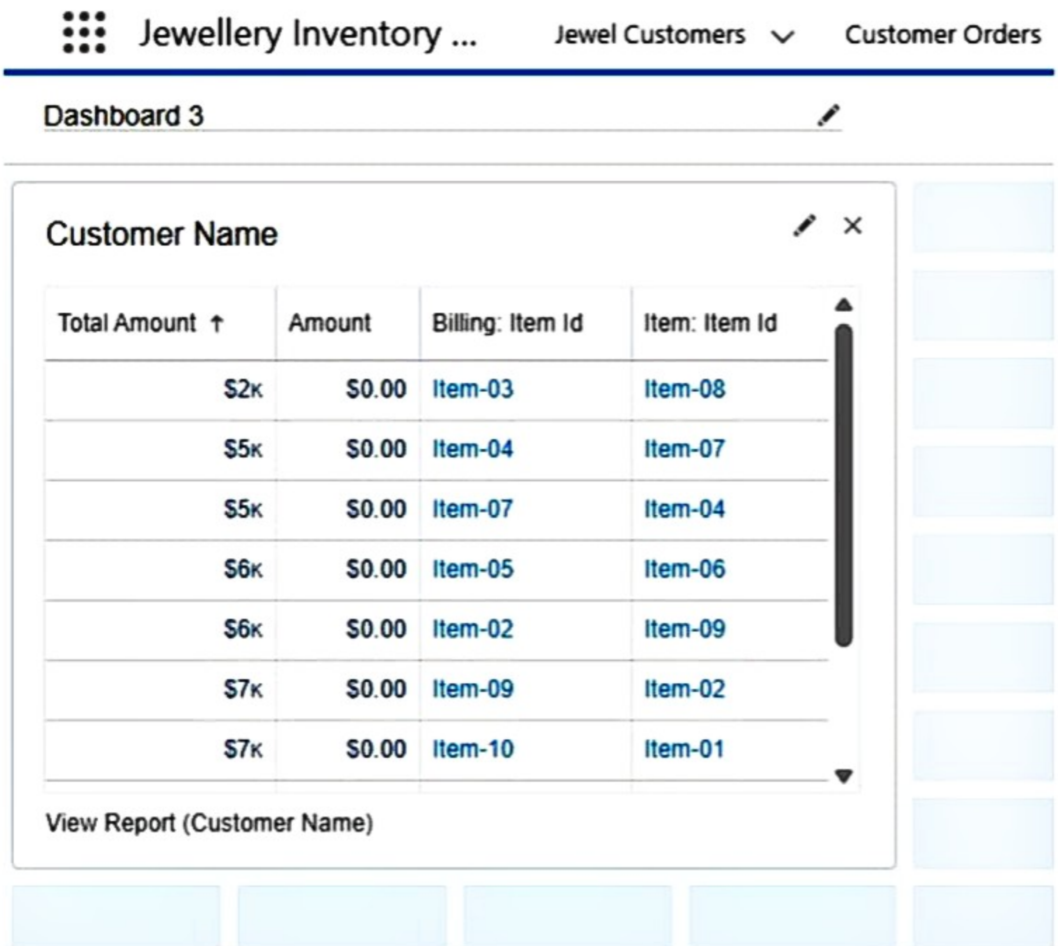


☐ SelecttheReportandClickonSelect



 Select“LightningTable”andClickon“ADD”

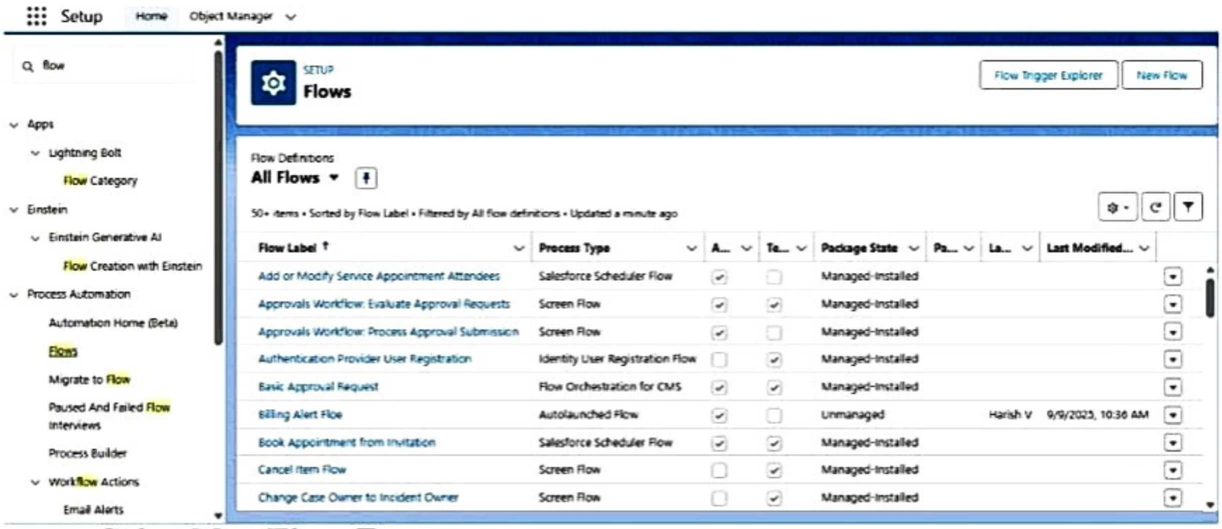




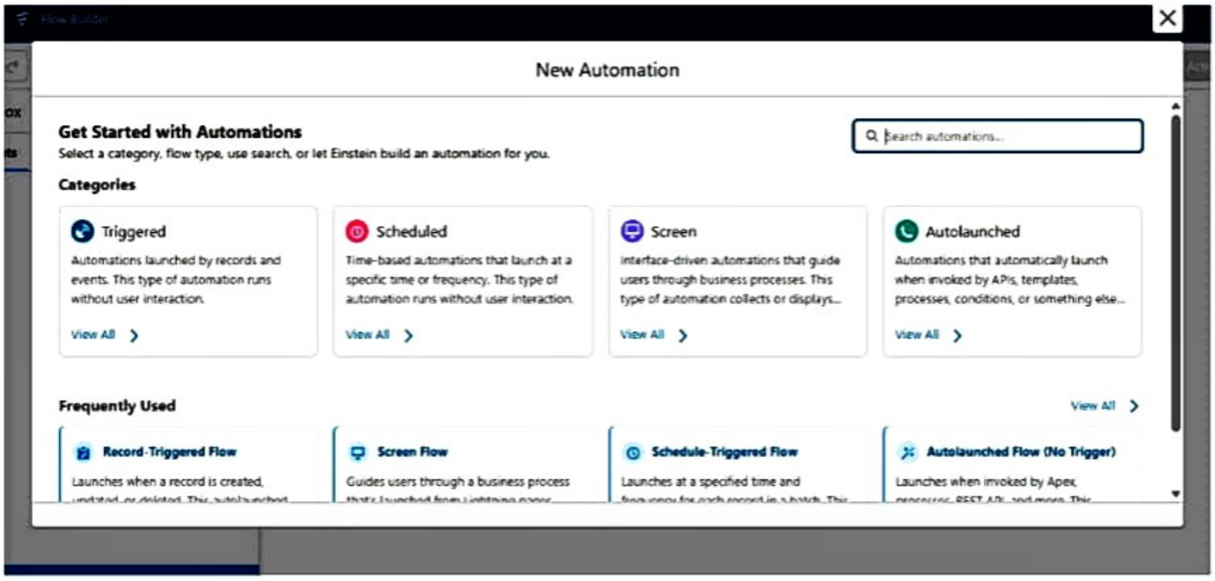
 ClickonSaveandDone.

XVIII . CreatingFlow

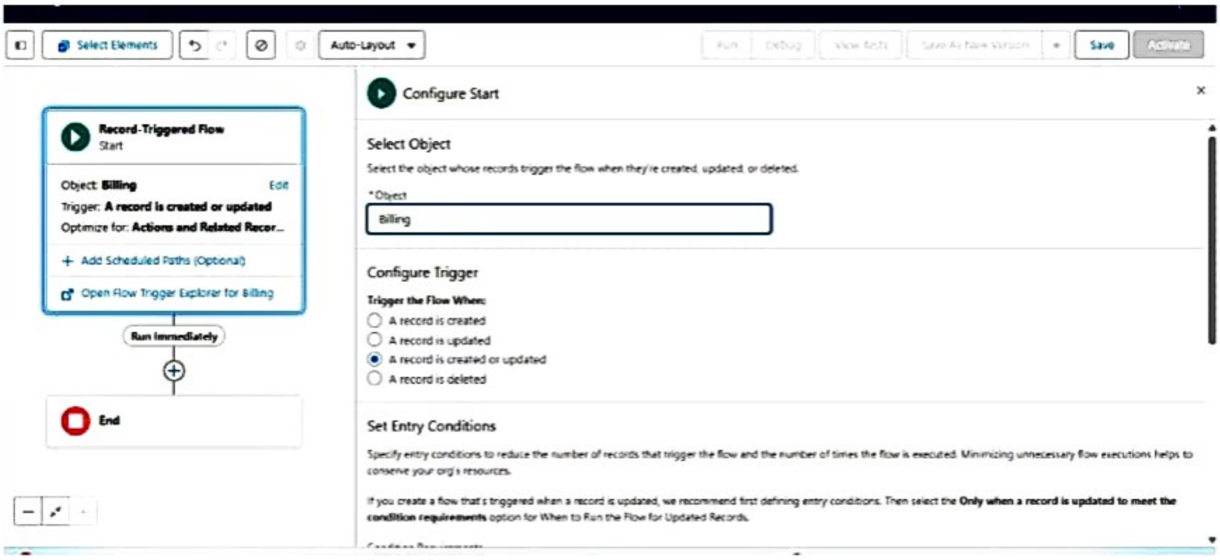
- ☐ InthesetpagesearchforFlowinthe“QuickfindBox”.



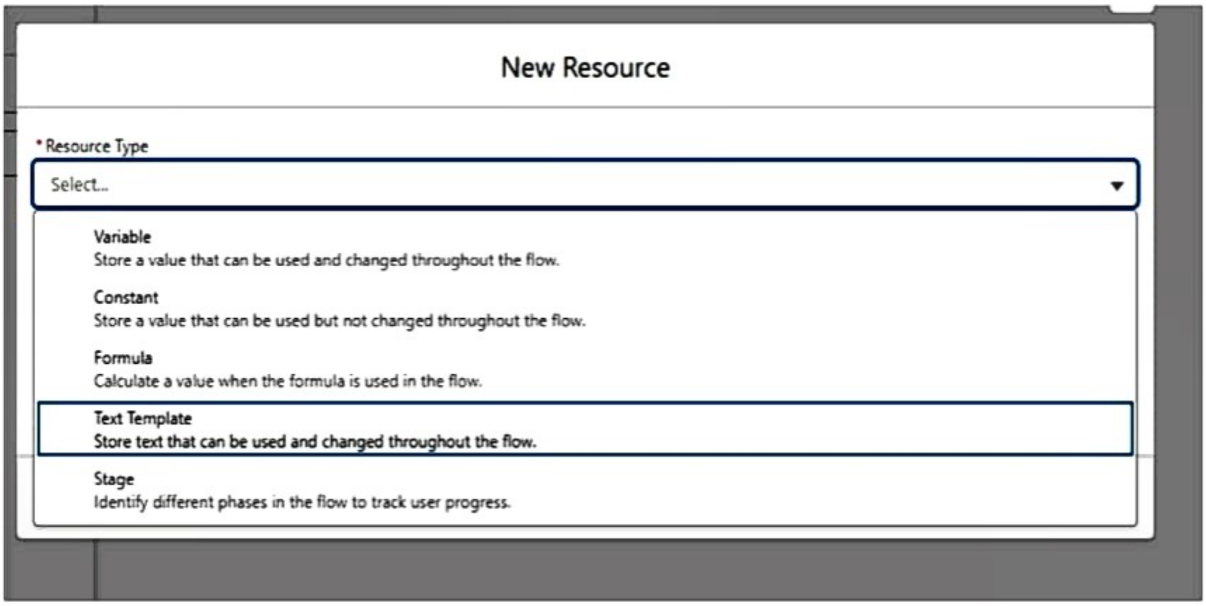
- ☐ SelectNewFlow.⊠
- ☐ SelecttheRecord-triggeredflowandClickonCreate

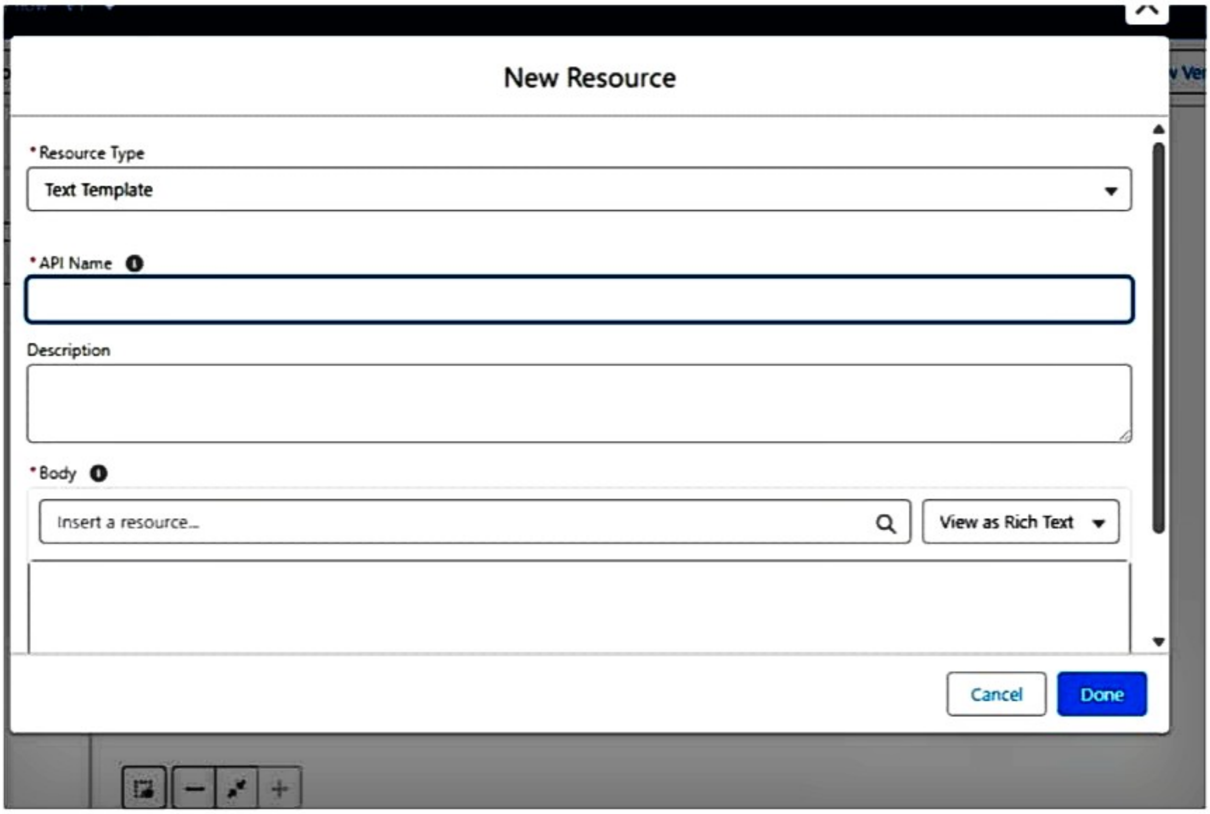


- ☐ SelecttheObjectasa“Billing”intheDropdownlist.⊠
- ☐ SelecttheTriggerFlowwhen:“ArecordisCreatedor Updated”.⊠
- ☐ SelecttheOptimisetheflowfor:“ActionsandRelatedRecords”and Click on Done.⊠



- ☐ ChangethemodeAutolayoutfromFree-Form.
- ☐ Nowselectthemangeroptioninthetoolbox,clickNewresource.
- ☐ Selecttheresourcetypeastexttemplate.
- ☐ Selectthetexttemplate.
- ☐





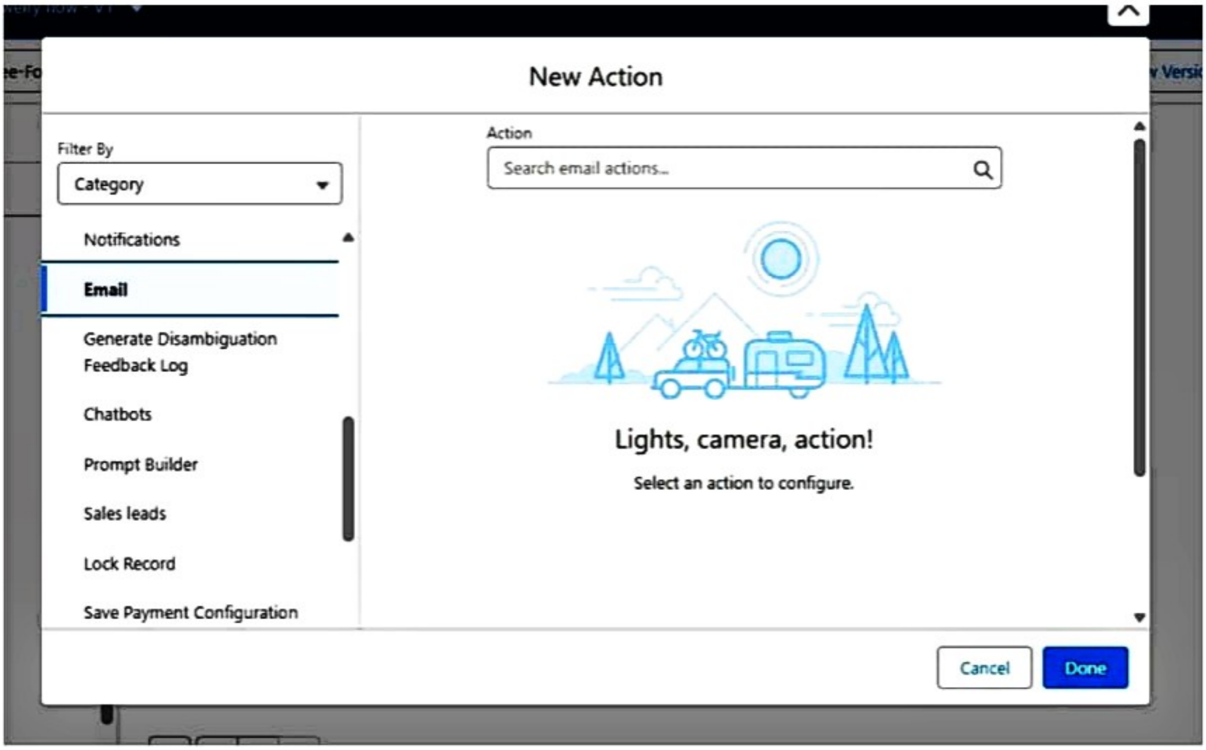
□ IntheAPInameenteras “Emailbody”.⊠
□ I nt he Bod ye nte rthis :⊠

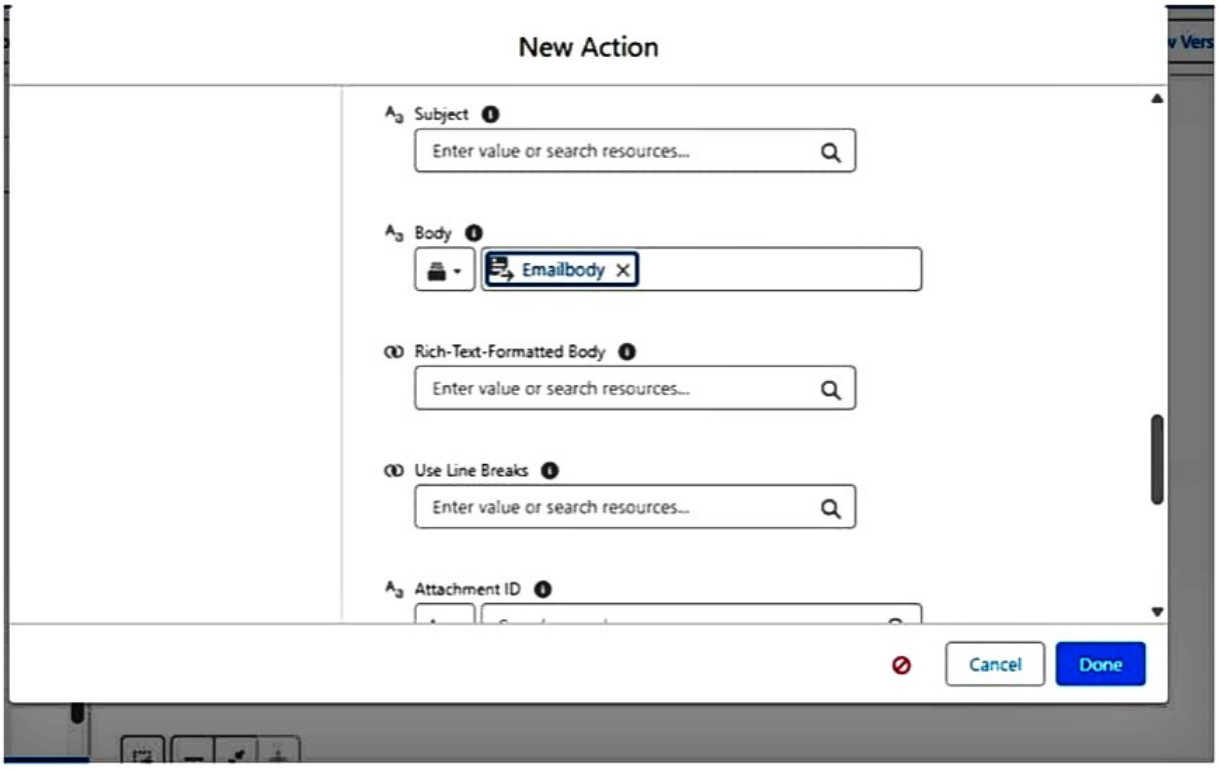
Hello
CustomerName:{!$Record.Item__r.Customer_Name__r.Name}
Herearethedetailsfortheitemyoupurchasedwith Jewellery Inventory System
Item Type: {!$Record.Item__r.Item_Type__c}
Ornament: {!$Record.Ornament__c}
Weight: {!$Record.Weight__c} grams
Amount: {!$Record.Amount__c}

□ Nowclicko nDo nea ndC licko n Ele me nt. ⊠
□ DragtheActiontothe panel.⊠
□ Theiractionbarwillbeopenedinthatsearchfor“sendemail”andclick on it.⊠
Givethelabelnameas“notice”⊠
□ APInamewillbeautopopulated.⊠
□ Enablethebodyinsetinputvaluesfortheselected action.⊠
Selectthetexttemplatethatwas created⊠

□

□





- ☐ Entertherecipientas:“SelecttriggeringrecordthenCustomerName> then
- ☐ Email field.”
  Thenclickondone
- ☐ Nowdragthepathfromthestarttotheactionelement.

 Clickonsave.GiventheFlowlabel,FlowApinamewillbeauto populated.

 Andclicksave,andclickon activate.

2. CONCLUSION :

The JewelGuard CRM application will revolutionize jewel management by providing a comprehensive platform for inventory tracking, customer management, sales automation, and data analysis. By implementing this CRM, jewelers and retailers can:

- Enhance operational efficiency
- Improve customer satisfaction and loyalty
- Increase sales and revenue
- Make informed business decisions
- Ensure secure and compliant data handling

With JewelGuard CRM, developers can build a robust and scalable solution that meets the unique needs of the jewelry industry, driving business growth and success.