

## **CRM JEWEL MANAGEMENT**

**College:Ayyanthiruvalluvar Arts and  
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**Code : bru4m**

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**TEAM SIZE : 4**

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## 1.INTRODUCTION:

### Project Overview

#### ***CRM Application for Jewel Management-(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 aimsto provide an efficient and user-friendly solution to track and control the inventory of various jewellery items, maintain accurate records, and facilitate seamless sales transactions.



## Purpose

The JewelGuard CRM application is designed to streamline and optimize jewel management for developers, jewelers, and retailers. Its primary purpose is to:

1. **Track Inventory:** Manage and monitor jewel stock levels, including details like type, quantity, value, and location.
2. **Customer Management:** Store customer information, purchase history, and preferences to enhance customer relationships and targeted marketing.
3. **Sales and Order Management:** Automates sales processes, track orders, and manage invoices and payments.
4. **Reporting and Analytics:** Provide insights into sales trends, inventory levels, and customer behavior to inform business decisions.
5. **Security and Compliance:** Ensure secure storage and handling of sensitive customer and jewel data, adhering to industry regulations.

# I. DEVELOPMENT PHASE

## Creating a Salesforce Developer Account:

By using this URL <https://www.salesforce.com/form/developer-signup/?d=pb>

### Created objects:

JewelCustomer, Item, CustomerOrder, Price, Billing

Fields & Relationships 11 Items, Sorted by Field Label					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	City	City_c	Text(20)		
Lightning Record Pages	Country	Country_c	Text(18)		
Buttons, Links, and Actions	Created By	CreatedById	Lookup(User)		
Compact Layouts	Customer Name	Name	Text(50)		
Field Sets	Email	Email_c	Email		
Object Limits	Last Modified By	LastModifiedById	Lookup(User)		
Record Types	Owner	OwnerId	Lookup(User,Group)		
Related Lookup Filters					
Search Layouts					

Fields & Relationships 28 Items, Sorted by Field Label					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Amount	Amount_c	Formula (Currency)		
Lightning Record Pages	Billing	Billing_c	Lookup(Billing)		
Buttons, Links, and Actions	Billings with item and Customer order	Billings_with_item_and_Customer_order_c	Lookup(Billing)		
Compact Layouts	Created By	CreatedById	Lookup(User)		
Field Sets	Customer Name	Customer_Name_c	Text(20)		
Object Limits	Email	Email_c	Email		
Record Types	Expected Days Of Return	Expected_Days_Of_Return_c	Picklist		
Related Lookup Filters					
Search Layouts					

SETUP &gt; 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






FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer_c	Lookup(Customer)		✓ <span style="float: right;">▼</span>
Customer Order Name	Name	Auto Number		✓ <span style="float: right;">▼</span>
Item	Item_c	Master-Detail(Item)		✓ <span style="float: right;">▼</span>
Last Modified By	LastModifiedById	Lookup(User)		
Order Status	Order_Status_c	Picklist		<span style="float: right;">▼</span>

SETUP &gt; 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






FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Gold Price	Gold_Price_c	Currency(8, 0)		<span style="float: right;">▼</span>
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Prices Name	Name	Auto Number		✓ <span style="float: right;">▼</span>
Silver Price	Silver_Price_c	Currency(8, 5)		<span style="float: right;">▼</span>

**Billing**

Details	Fields & Relationships				
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Amount	Amount_c	Formula (Currency)		
Lightning Record Pages	Billing Name	Name	Auto Number		
Buttons, Links, and Actions	Created By	CreatedById	Lookup(User)		
Compact Layouts	Customer Name	Customer_Name_c	Text(20)		
Field Sets	Email	Email_c	Email		
Object Limits	Gold/Silver Price	Gold_Silver_Price__c	Formula (Currency)		
Record Types	Item	Item_c	Lookup(Item)		
Related Lookup Filters					
Search Layouts					

**CreatingCustomTabs:**

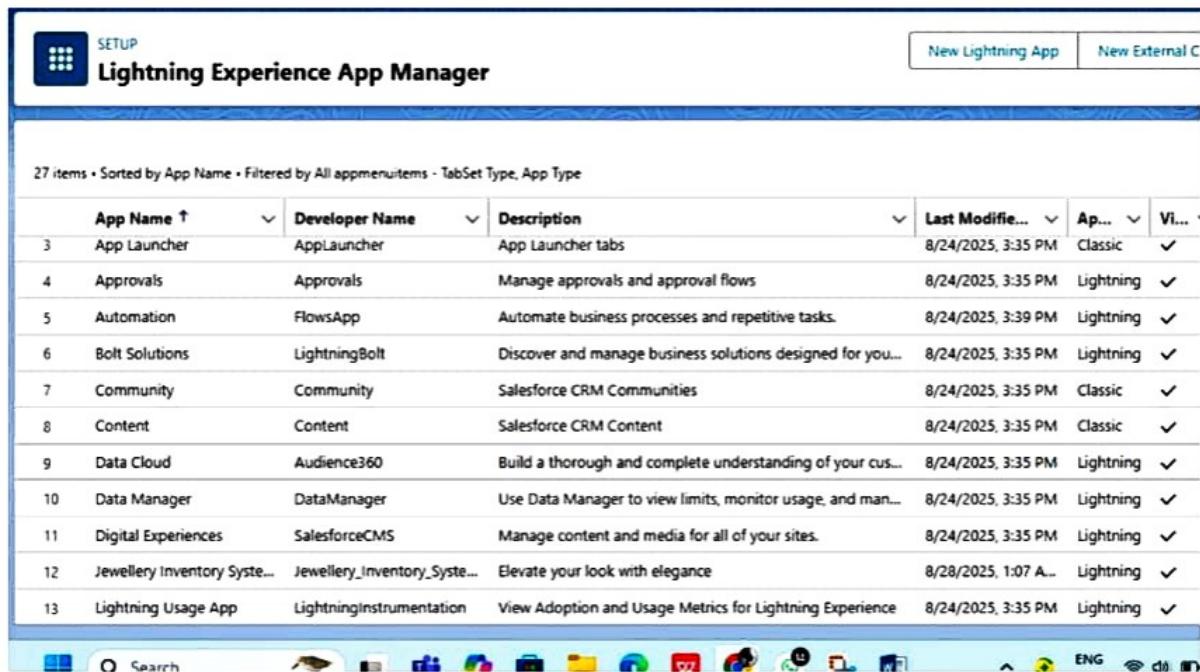
JewelCustomer,Item,CustomerOrder,Price,Billing.

The screenshot shows the 'Custom Object Tabs' section of the Salesforce Setup - Tabs page. It lists ten custom object tabs, each with an 'Edit | Del' link and a corresponding icon and label. The tabs are:

- Assets (Radar dish)
- Asset Services (Jewel)
- Billing (Trophy)
- Customer Orders (Hands)
- Employees (Star)
- Items (Heart)
- Jewel Customers (Moon)
- Prices (Locked)
- Projects (Headset)
- ProjectTasks (Stopwatch)

At the top of the page, there is a message: "Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app." Below the tabs, there is a "What Is This?" link and a "Description" column.

## II . CreateaLightningApp



The screenshot shows the Lightning Experience App Manager page. At the top, there's a header with a blue bar containing the 'SETUP' icon and the title 'Lightning Experience App Manager'. Below the header, a sub-header displays '27 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type'. On the right side of the header, there are two buttons: 'New Lightning App' and 'New External C'. The main content area is a table with 13 rows, each representing an app. The columns are: 'App Name' (sorted), 'Developer Name', 'Description', 'Last Modified', 'Ap...', and 'Vi...'. The table lists various built-in Salesforce apps like 'App Launcher', 'Approvals', 'Automation', etc. The last row shows the 'Lightning Usage App' developed by 'LightningInstrumentation'. The bottom of the screen features a standard Windows-style taskbar with icons for search, file operations, and system status.

App Name ↑	Developer Name	Description	Last Modified	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☒

Fields & Relationships					11 items, Sorted by Field Label	<input type="button" value="Quick Find"/>	<input type="button" value="New"/>	<input type="button" value="Deleted Fields"/>	<input type="button" value="Field Dependencies"/>	<input type="button" value="Set History Tracking"/>
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED					
Page Layouts	City	City_c	Text(20)			<input type="button" value="▼"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>
Lightning Record Pages	Country	Country_c	Text(18)			<input type="button" value="▼"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>
Buttons, Links, and Actions	Created By	CreatedById	Lookup(User)			<input type="button" value="▼"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>
Compact Layouts	Email	Email_c	Email			<input type="button" value="▼"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>
Field Sets	Jewel Customer Name	Name	Text(30)			<input type="button" value="▼"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>
Object Limits	Last Modified By	LastModifiedById	Lookup(User)			<input type="button" value="▼"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>
Record Types	Owner	OwnerId	Lookup(User,Group)			<input type="button" value="▼"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>
Related Lookup Filters						<input type="button" value="▼"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>
Search Layouts						<input type="button" value="▼"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>

## 2. Item

### Fields in item

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

SETUP > OBJECT MANAGER  
Item

Fields & Relationships					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Amount	Amount__c	Formula (Currency)		
Lightning Record Pages	Created By	CreatedBy	Lookup(User)		
Buttons, Links, and Actions	Customer Name	Customer_Name__c	Lookup(Jewel Customer)		
Compact Layouts	Expected Days Of Return	Expected_Days_Of_Return__c	Picklist	Priority	
Field Sets	Gold Price	Gold_Price__c	Formula (Currency)		
Object Limits	Item Id	Name	Auto Number		
Record Types	Item Type	Item_Type__c	Picklist		
Related Lookup Filters					
Search Layouts					

### 3. CustomerOrder

Fields in CustomerOrder

☒ OrderStatus☒

SETUP > OBJECT MANAGER  
Customer Order

Fields & Relationships					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedBy	Lookup(User)		
Lightning Record Pages	Customer	Customer__c	Lookup(Jewel Customer)		
Buttons, Links, and Actions	Item	Item__c	Master-Detail(Item)		
Compact Layouts	Item Id	Name	Auto Number		
Field Sets	Last Modified By	LastModifiedBy	Lookup(User)		
Object Limits	Order Status	Order_Status__c	Picklist		
Record Types					
Related Lookup Filters					
Search Layouts					

### 4. Price

Fields in Prices

☒ GoldPrice☒

☒ SilverPrice☒

Fields & Relationships					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedBy	Lookup(User)		
Lightning Record Pages	Gold Price	Gold_Price__c	Currency(8, 0)		
Buttons, Links, and Actions	Item Id	Name	Auto Number		
Compact Layouts	Last Modified By	LastModifiedBy	Lookup(User)		
Field Sets	Owner	Owned	Lookup(User/Group)		
Object Limits	Silver Price	Silver_Price__c	Currency(8, 5)		
Record Types					
Related Lookup Filters					
Search Layouts					

## 5. Billing

### Fields in Billing

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

Fields & Relationships					
FIELD LABEL		FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount		Amount__c	Formula (Currency)		
Created By		CreatedById	Lookup(User)		
Gold/Silver Price		Gold_Silver_Price__c	Formula (Currency)		
Item		Item__c	Lookup(Item)		
Item Id		Name	Auto Number		
KDM Charge		KDM_Charge__c	Formula (Currency)		
Last Modified By		LastModifiedById	Lookup(User)		

## To create a Field Dependencies in Item object

Item Field Dependencies					
Field Dependencies		New		Here for this Page	
Action	Controlling Field	Dependent Field	Expected Days Of Return	Modified By	Harish V 9/2/2025, 11:12 PM
Ent : Del	Priority				

## To create a Validation Rules in Jewel Customer object

Validation Rules					
1 Items. Sorted by Rule Name					
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	New
Postal_Code	Top of Page	Must contain 6 digits", select the Error location as Field and select the field as "Zip/Postal code"		Harish V 9/2/2025, 11:21 PM	

## IV . Create a GoldSmith Profile

The screenshot shows the Salesforce 'Profiles' page under the 'SETUP' tab. The page title is 'Profiles'. At the top, there are buttons for 'New Profile' and a search bar. Below the search bar is a table with one row, showing a profile named 'Gold\_Smith' with a 'Gold Partner' license and 'Salesforce' as the custom setting. The table includes columns for 'Action', 'Profile Name', 'User License', and 'Custom'. At the bottom of the table, there are buttons for 'Edit | Clone' and 'Edit | Del | ...'. Navigation links at the bottom include 'A B C D E F G H I J K L M N O P Q R S T U V W X Y Z | Other | All' and a 'Help for this Page' link.

## Select this in Custom Object Permissions

The screenshot shows the 'Custom Object Permissions' page under the 'SETUP' tab. It displays two tables of permissions. The first table lists objects: Data Share Definitions, Data Share Sagemaker Connections, Data Share Snowflake Connections, Data Share Targets, and Data Share Target Connection. The second table lists objects: Work Plans, Work Plan Templates, Work Step Templates, Work Types, and Work Type Groups. Each object has a column for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All Records, Modify All Records, View All Fields). The 'Work Plans' row in the second table has a 'Work Plan' icon next to it. The 'Work Type Groups' row has a 'Work Type Group' icon next to it.

## V . Create a Worker Profile

The screenshot shows the Salesforce 'Profiles' page under the 'SETUP' tab. The page title is 'Profiles'. At the top, there are links for 'All Profiles', 'Edit', 'Delete', and 'Create New View'. A 'Help for this Page' link is also present. Below the header, there is a toolbar with a 'New Profile' button and other icons. The main content area displays a table of profiles:

Action	Profile Name	User License	Custom
<input type="checkbox"/>	<a href="#">Work.com Only User</a>	Work.com Only	
<input type="checkbox"/>	<a href="#">Worker</a>	Salesforce Platform	✓
<input type="checkbox"/>	<a href="#">Worker_Profile</a>	Salesforce	✓
<input type="checkbox"/>	<a href="#">Workers</a>	Salesforce Platform	✓

At the bottom of the table, there are pagination controls: '1-4 of 4' and '0 Selected'. To the right, there are 'Previous' and 'Next' buttons, and a 'Page 1 of 1' indicator.

Select this in Custom Object Permissions

The screenshot shows the 'Custom Object Permissions' page. The page title is 'Custom Object Permissions'. The main content area displays a table of object permissions:

Object	Basic Access							Data Administration						
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Billings	✓	✓	✓	✓	✓	✓	□	✓	✓	✓	✓	✓	✓	□
Customer Orders	✓	✓	✓	✓	✓	✓	□	✓	✓	✓	✓	✓	✓	□
Items	✓	✓	✓	✓	✓	✓	□							□
Jewel Customers	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	□
Prices	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	□

## VI . CreatingRolefor GoldSmith

**SETUP Roles**

### Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy  
View other sample Role Hierarchies: **Territory-based Sample**

\* View & edit data, roll up forecasts, & generate reports for all users directly below.  
\* Can't access data of other Executive Staff

\* View & edit data, roll up forecasts, & generate reports for all users directly below.  
\* Can't access data of users above or at same level

\* View & edit data, roll up forecasts, & generate reports only for own users.  
\* Can't access data of users above or at same level

**Get (In Roles)**

RoleisCreatedforGold Smith

**SETUP Roles**

**Collapse All Expand All**

- Kathir College of Arts and Science**
  - Add Role**
  - CEO** **Edit | Del | Assign**
    - Add Role**
  - CFO** **Edit | Del | Assign**
    - Add Role**
  - COO** **Edit | Del | Assign**
    - Add Role**
  - Gold\_Smith** **Edit | Del | Assign**
    - Add Role**
    - Worker** **Edit | Del | Assign**
      - Add Role**
  - SVP\_Customer\_Service & Support** **Edit | Del | Assign**
    - Add Role**
    - Customer\_Support\_International** **Edit | Del | Assign**
      - Add Role**
    - Customer\_Support\_North\_America** **Edit | Del | Assign**
      - Add Role**
    - Installation & Repair Services** **Edit | Del | Assign**
      - Add Role**
    - SVP\_Human\_Resources** **Edit | Del | Assign**
      - Add Role**

## VII . Creating Role for Worker

**SETUP Roles**

### Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy  
View other sample Role Hierarchies: **Territory-based Sample**

The screenshot shows a sample role hierarchy for a sales organization. At the top level, there is an 'Executive Staff' group containing 'CEO', 'President', 'CFO', and 'VP, Sales'. Arrows point down from this group to three regional 'Sales Director' roles: 'Western Sales Director', 'Eastern Sales Director', and 'International Sales Director'. Each of these directors has a list of 'Sales Rep' roles under them: 'Western Sales Rep' (with sub-reps 'CA Sales Rep' and 'OR Sales Rep'), 'Eastern Sales Rep' (with sub-reps 'NY Sales Rep' and 'MA Sales Rep'), and 'International Sales Rep' (with sub-reps 'Asian Sales Rep' and 'European Sales Rep'). To the right of each role, there is a list of permissions:

- Executive Staff:**
  - View & edit data, roll up forecasts, & generate reports for all users below
  - Can't access data of other Executive Staff
- Western Sales Director:**
  - View & edit data, roll up forecasts, & generate reports for all users directly below
  - Can't access data of users above or at same level
- Eastern Sales Director:**
  - View & edit data, roll up forecasts, & generate reports for all users directly below
  - Can't access data of users above or at same level
- International Sales Director:**
  - View & edit data, roll up forecasts, & generate reports only for own data
  - Can't access data of users above or at same level

**Help for this Page**

□ Role is Created for Worker □

**SETUP Roles**

**Collaps All Expand All**

- Kathir College of Arts and Science**
  - Add Role**
  - CEO** **Edit | Del | Assign**
    - Add Role**
  - CFO** **Edit | Del | Assign**
    - Add Role**
  - COO** **Edit | Del | Assign**
    - Add Role**
  - Gold Smith** **Edit | Del | Assign**
    - Add Role**
  - Worker** **Edit | Del | Assign**
    - Add Role**
  - SVP, Customer Service & Support** **Edit | Del | Assign**
    - Add Role**
  - Customer Support, International** **Edit | Del | Assign**
    - Add Role**
  - Customer Support, North America** **Edit | Del | Assign**
    - Add Role**
  - Installation & Repair Services** **Edit | Del | Assign**
    - Add Role**
  - SVP, Human Resources** **Edit | Del | Assign**
    - Add Role**

## VIII . CreatingUser

### □ CreatinguserwiththeRoleasaGoldSmith

The screenshot shows the Salesforce 'Users' setup page. A user named 'Niklaus Mikaelson' is selected. The 'User Detail' section displays the following information:

User Detail	Value	Role
Name	Niklaus Mikaelson	Gold Smith
Alias	mika	User License
Email	harishav2845@gmail.com [Verify]	Profile
Username	niklaus@org.com	Active
Nickname	Nick	Marketing User
Title		Offline User
Company		Knowledge User
Department		Flow User
Division		Service Cloud User
Address		Site.com Contributor User
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User
Locale	English (United States)	WDC User

### □ CreatinguserwiththeRoleasa Worker

The screenshot shows the Salesforce 'Users' setup page. A user named 'Kol Mikaelson' is selected. The 'User Detail' section displays the following information:

User Detail	Value	Role
Name	Kol Mikaelson	Worker
Alias	mik	User License
Email	harishav2845@gmail.com [Verify]	Profile
Username	mikel@org.com	Active
Nickname	mikael	Marketing User
Title		Offline User
Company		Knowledge User
Department		Flow User
Division		Service Cloud User
Address		Site.com Contributor User
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User
Locale	English (United States)	WDC User

### □ Createtwomoreusersaswiththesameroleasworker

## IX . Creating Page Layouts

### o Creating Page Layout for Gold

The screenshot shows the Salesforce Object Manager interface for the 'Item' object. On the left, a sidebar lists various settings 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, and Search Layouts. The main area is titled 'Page Layouts' and shows a table with three items: 'Item Layout' (Created by Harish V., 9/2/2025, 9:52 PM), 'Page Layout for Gold' (Created by Harish V., 9/3/2025, 1:41 AM), and 'Page Layout for Silver' (Created by Harish V., 9/8/2025, 10:20 AM). There are 'Quick Find', 'New', and 'Page Layout Assignment' buttons at the top right.

The screenshot shows the 'Page Layout Properties' editor for the 'Item' object. The top bar includes Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties buttons. The 'Fields' tab is selected, displaying a list of fields: Section, Blank Space, Customer Name, Item Type, Ornament, Priority, Silver Price, Weight, Amount, Expected Days Of Return, Purity, Purity Gold Price, Stone Weight, Gold Price, Last Modified By, Percentage, Prices, Record Type, and Total Weight. Below this is a preview pane showing a sample record with values like Item ID: GEN-2024-001234, Customer Name: Sample Text, etc. The sidebar on the left is identical to the one in the previous screenshot.

## o Creating page Layout for Silver

SETUP > OBJECT MANAGER

**Item**

**Page Layouts**

3 items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Item Layout	Harish V, 9/2/2025, 9:52 PM	Harish V, 9/8/2025, 10:00 AM
Page Layout for Gold	Harish V, 9/3/2025, 1:41 AM	Harish V, 9/8/2025, 10:25 AM
Page Layout for Silver	Harish V, 9/8/2025, 10:20 AM	Harish V, 9/8/2025, 10:26 AM

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

SETUP > OBJECT MANAGER

**Item**

**Page Layouts**

Fields

Section	Customer Name	Item Type	Omnichannel	Priority	Silver Price	Weight
Blank Space	Expected Days Of Return	KCWF	Owner	Purity	Stone/Other Price	
Amount	Gold Price	Last Modified By	Percentage	Purity Gold Price	Stone Weight	
Created By	Item ID	Making Charges	Prices	Record Type	Total Weight	

Customer Name: Sample Text  
Prices: Sample Text  
Item Type: Sample Text  
Omnichannel: Sample Text  
Silver Price: 6.259  
Weight: 0.67426  
Stone Weight: 0.29928  
Stone/Other Price: \$123.45  
Total Weight: 40.329  
Percentage: 55  
Amount: \$123.45  
KCFW: \$123.45

Save • Quick Save • Preview As... • Cancel • Undo • Redo • Layout Properties

## X . Creating Record Type

### □ Create record type for Gold

SETUP > OBJECT MANAGER

Item

Record Types

2 items. Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	Harish V, 9/8/2025, 10:37 AM
Silver	Silver items information	✓	Harish V, 9/8/2025, 10:41 AM

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

SETUP > OBJECT MANAGER

Item

Record Type  
Gold

Back to Custom Object Item

Help for this Page

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

Record Type Label	Gold	Active	
Record Type Name	Gold		
Namespace Prefix			
Description	Gold items information		
Created By	Harish V 9/8/2025, 10:37 AM	Modified By	Harish V 9/8/2025, 10:37 AM

Picklists Available for Editing

Action	Field	Modified Date
Edit	Expected Days Of Return	9/8/2025, 10:37 AM
Edit	Item Type	9/8/2025, 10:37 AM
Edit	Priority	9/8/2025, 10:37 AM

Picklists Available for Editing (4) [?](#)

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

## Create Record Type for Silver

SETUP > OBJECT MANAGER  
**Item**

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

**Record Types**  
2 items, Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	Harish V, 9/8/2025, 10:37 AM
Silver	Silver items information	✓	Harish V, 9/8/2025, 10:41 AM

SETUP > OBJECT MANAGER  
**Item**

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

**Record Type**  
**Silver**  
+ Back to Custom Object: Item

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

**Edit**

Record Type Label	Silver	Active	
Record Type Name	Silver		
Namespace Prefix			
Description	Silver items information		
Created By	Harish V 9/8/2025, 10:41 AM	Modified By	Harish V 9/8/2025, 10:41 AM

**Picklists Available for Editing**

Action	Field	Modified Date
Edit	Expected Days Of Return	9/8/2025, 10:41 AM
Edit	Item Type	9/8/2025, 10:41 AM
Edit	Priority	9/8/2025, 10:41 AM

## XI . Creating permission set

The screenshot shows the 'Permission Sets' page in the Salesforce setup. The header includes a user icon, 'SETUP', and the page title 'Permission Sets'. Below the title, a sub-header says 'On this page you can create, view, and manage permission sets.' A navigation bar at the top right includes 'All Permission Sets' with dropdown options, 'Edit | Delete | Create New View', and a 'Help for this Page' link. The main content area displays a table of permission sets. The columns are 'Action', 'Permission Set Name', 'Description', and 'License'. The table lists several permission sets, such as '(Legacy) Data Cloud Data Aware Specialist', '(Legacy) Data Cloud Marketing Admin', and 'Access Agentforce Default Agent'. The 'Description' column provides details about each set, and the 'License' column indicates the platform it applies to. The table has a header row with letters A through Z and 'Other [AM]'. At the bottom of the table, there are pagination controls showing '1 of 4'.

- Create a label name as a Perto worker

The screenshot shows the 'Apps' section of the 'Permission Sets' page. The header is 'Permission Sets'. The main content area is titled 'Apps' and contains a list of app-related permissions. Each item is a link with a brief description. The items include:

- [Assigned Apps](#)  
Settings that specify which apps are visible in the app menu
- [Assigned Connected Apps](#)  
Settings that specify which connected apps are visible in the app menu
- [Object Settings](#)  
Permissions to access objects and fields, and settings such as tab availability
- [App Permissions](#)  
Permissions to perform app-specific actions, such as "Manage Call Centers"
- [Apex Class Access](#)  
Permissions to execute Apex classes
- [Visualforce Page Access](#)  
Permissions to execute Visualforce pages
- [External Data Source Access](#)  
Permissions to authenticate against external data sources
- [Flow Access](#)  
Permissions to execute Flows
- [Named Credential Access](#)  
Permissions to authenticate against named credentials
- [External Credential Principal Access](#)

- Then Click on the Object Setting.
- Enable let he Go lda ndS ilver in object per mis s ion.

**Items**

**Tab Settings**

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

**Item: Record Type Assignments**

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

**Object Permissions**

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

- Click on save the permission and click on the Manage assignment.
- Now click on the Add Assignment.

**All Users**

8 items • Sorted by Full Name • Filtered by All users • Updated a few seconds ago

<input type="checkbox"/> Full Name ↑	<input type="checkbox"/> AI... ↓	<input type="checkbox"/> Username	<input type="checkbox"/> Role	<input type="checkbox"/> A... ↓	<input type="checkbox"/> Profile	<input type="checkbox"/> Status
Chatter Expert	Chatter	chatty@0dgk0000afngiu5.wzwlddkjkezhq@chatter.salesforce.com	<input checked="" type="checkbox"/>	Chatter Free User	<input type="checkbox"/>	<input type="checkbox"/>
Harish V	har	harishav2848526@agentforce.com	<input checked="" type="checkbox"/>	System Administrator	<input type="checkbox"/>	<input type="checkbox"/>
Integration User	integ	integration@0dgk0000afngiu5.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration Us...	<input type="checkbox"/>	<input type="checkbox"/>
Kol Mikaelson	mik	mikel@org.com	Worker	<input checked="" type="checkbox"/>	Worker	<input type="checkbox"/>
mohammed Ali	mali	ali26@org.com	Worker	<input checked="" type="checkbox"/>	Worker	<input type="checkbox"/>
Niklaus Mikaelson	nmika	nickalus@org.com	Gold Smith	<input checked="" type="checkbox"/>	Gold Smith	<input type="checkbox"/>

**Cancel** **Next**

- Select the user you created in the previous milestone.
- Then click on next and click on Assign.

The screenshot shows the 'Per to Worker' setup page in Salesforce. At the top, there's a breadcrumb trail: ... > SETUP > PERMISSION SET 'PER TO WORKER'. Below it, the title 'Per to Worker' is displayed. Underneath, a section titled 'Current Assignments' lists one assignment:

Full Name	Active	Role	Profile	User License	Expires On
Kol Mikaelson	✓	Worker	Worker	Salesforce Platform	

At the bottom right of the table, there are buttons for 'Add Assignment' and other actions.

## XII . Creating Trigger

- Open the Developer Console in new tab

The screenshot shows the Salesforce developer console interface. At the top, the URL is orgfarm-9b88b88bb5-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage. The browser's address bar shows the same URL.

The interface includes a file menu with options like New, Open, Save, and Close, along with keyboard shortcuts. Below the menu is a toolbar with tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The Logs tab is currently selected.

User	Application	Operation	Time	Status	Read	Size

At the bottom, there's a status bar with the message 'Please log in to view this page'.

- Click on file Select "NEW".
- Select the file as "Apex Classes"
- Enter the Name as "UpdatePaidAmountTriggerHandler"



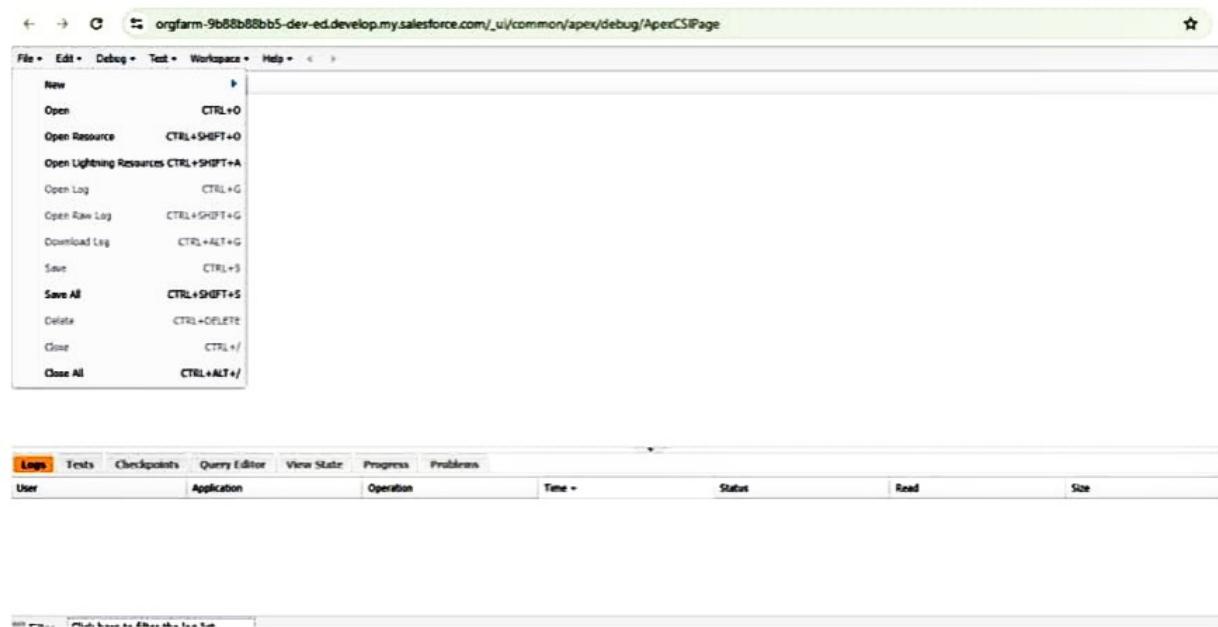
- In this Apex Class Enter the Code given below:

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

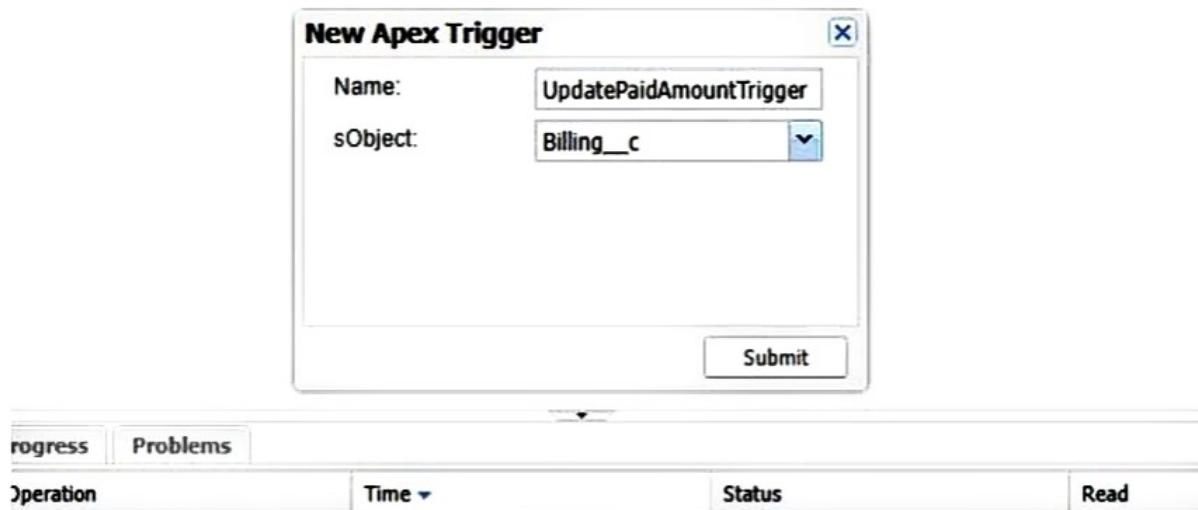
public static void handleBeforeUpdate(Map<Id, Billing>
List<Billing> updatedBillings) {
    for(Billing__c billing:updatedBillings){
        Billing__c oldBilling = oldBillingsMap.get(billing.Id);
        Decimal oldPaidAmount = oldBilling.Paid_Amount__c;
        billing.Paid_Amount__c = oldPaidAmount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

}

## Create another Trigger with the “Apex Trigger”



- Click On file Select “NEW”
- Select the file as “Apex Trigger”
- Enter the Name as “UpdatePaidAmountTriggerHandler.”
- Select the Object as “Billing\_c”
- 



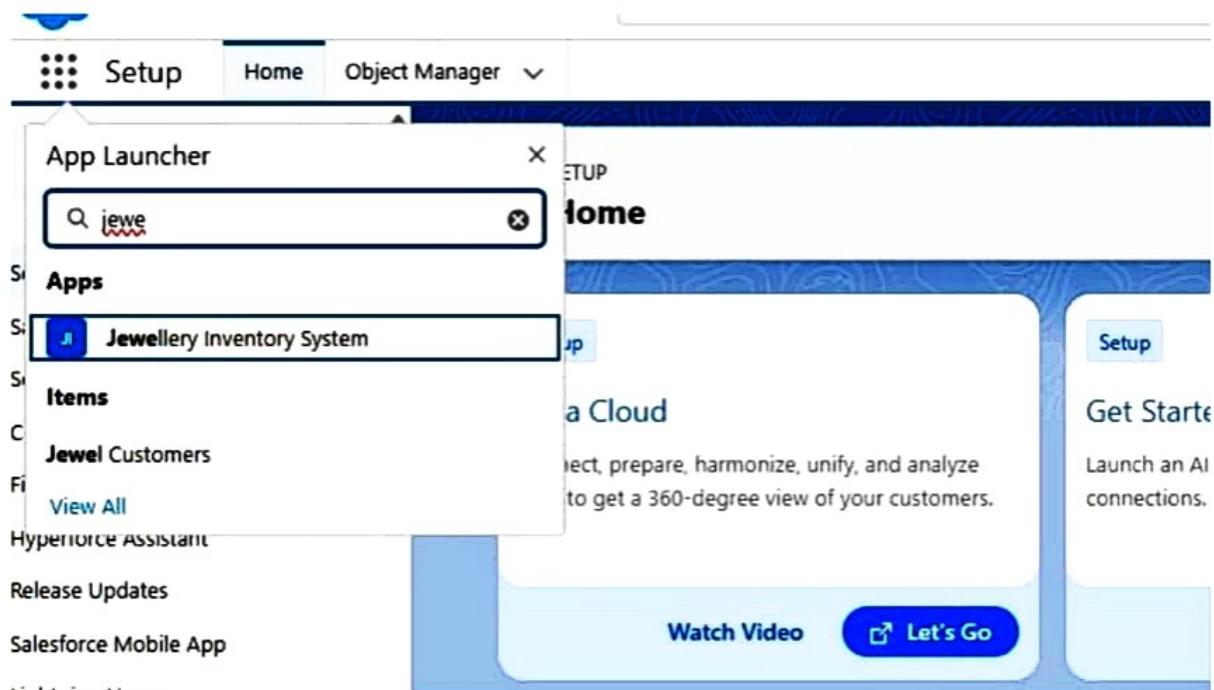
- Enter the code given below:

```
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

Create a Record (JewelCustomer)

- Click on App launcher.
- Search Jewelry Inventory System & click on it.



## XIV . View the Jewelry Customer

- Click on the JewelCustomer Tab.
- Click on “NEW”
- Click on any record name, you can see the details of the JewelCustomer.

The screenshot shows a Salesforce Lightning interface for creating a new customer. The title bar says "New Jewel Customer". The "Information" section contains fields for "Jewel Customer Name" (set to "sabarish"), "Owner" (set to "Harish V"), "City", "Phone", "Email", and "Zip/Postal code". There are three buttons at the bottom: "Cancel", "Save & New", and "Save". A note in the top right corner indicates that an asterisk (\*) means "Required Information". On the left, there's a sidebar titled "Recently Viewed" showing a list of names: Varman, Rahul, Dilipan, Gojo, Chirs, Robert Downey JR, Mani, Arscath, Surya, and Christopher NOLAN.

- Fill the Details in corresponding Columns.
- Then click on save.

The screenshot shows a list view of "Jewel Customers" in Salesforce Lightning. The header includes a "New" button and a search bar. The main area displays a table with columns for rank, checkbox, and customer name. The data is as follows:

	Jewel Customer Name
1	Varman
2	Rahul
3	Dilipan
4	Gojo
5	Chirs
6	Robert Downey JR

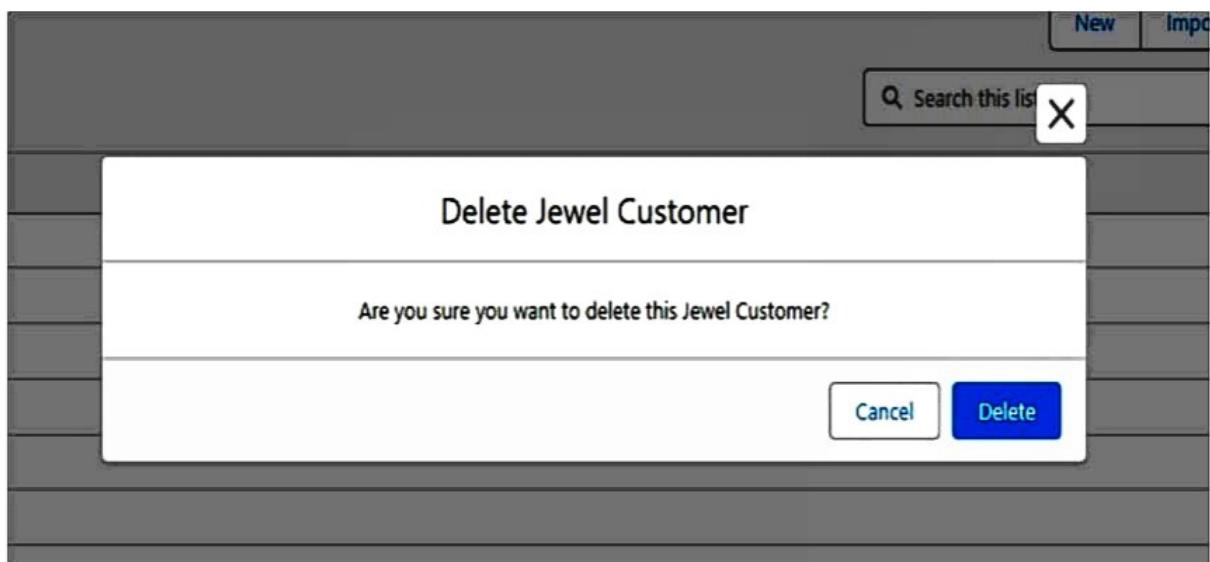
## XV . DeleteaRecord(Jewel Customer)

- Selectarecordwhichiswanttodelete

Jewellery Inventory ...    Jewel Customers    Customer Orders    Items    Prices    Billings    Reports    Dashboards

Recently Viewed

	Jewel Customer Name
1	Verman
2	Rahul
3	Dilipan
4	Goya
5	Chrs
6	Robert Downey JR
7	Mani
8	Arcath
9	Surya
10	Christopher Nolan



- ClickonDeletetodeletetheRecord

## XVI . CreateReport

- Go to the app and click on the reports tab
- Click New Report

The screenshot shows the 'Reports' section of the Salesforce interface. On the left, there's a sidebar with categories like 'Recent', 'Created by Me', 'Private Reports', etc. The main area displays a table of reports with columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. Three reports are listed:

Report Name	Description	Folder	Created By	Created On	Subscribed
Item with Customer Orders		Private Reports	Harish V	9/9/2025, 10:13 AM	<input checked="" type="checkbox"/>
Billing with Items		Private Reports	Harish V	9/9/2025, 10:10 AM	<input checked="" type="checkbox"/>
Price Report		Private Reports	Harish V	9/9/2025, 9:15 AM	<input checked="" type="checkbox"/>

- Click on "NEWREPORT".
- Select Record type as object we created.
- Then click on Start Report.

The screenshot shows the 'Create Report' dialog box. On the left, there's a sidebar with categories like 'Recently Used', 'All', 'Accounts & Contacts', 'Opportunities', etc. The main area has a search bar with 'Q. Bill' and a table with columns 'Report Type Name' and 'Category'. Two items are listed: 'Billings' under 'Standard' and 'Billings with Item' also under 'Standard'. To the right, there's a 'Details' panel showing 'Billings' as a 'Standard Report Type' with a 'Start Report' button. Below that, there are sections for 'Created By You' (No Reports Yet) and 'Created By Others' (No Reports Yet). At the bottom, there's a 'Fields (23)' link.

**Now Billing's Report**

**Show Fields** **Filters 1**

**Groups**  
GROUP ROWS  
Add group...

**Columns**  
Add column...   
# Paid Amount   
Ornament   
# Gold/Silver Price   
Billing: Item Id

**Previewing a limited number of records.**

	Paid Amount	Ornament
1	\$95,000	Necklace
2	\$90,000	Bracelet
3	\$65,000	Ring
4	\$80,000	Ring
5	\$70,000	Ring
6	\$75,000	Crown
7	\$67,000	Ring
8	\$78,000	Earing
9	\$78,000	bracelet
10	\$65,000	Chain
11	\$763,000	

In the fields Select the object you want to show in the Column

Search all fields    **Filters 1**

**Groups**  
GROUP ROWS  
Add group...

**Columns**  
Add column...   
# Total Amount   
# Making Charges   
# Paid Amount   
Ornament   
# Gold/Silver Price   
Billing: Item Id

**Previewing a limited number of records. Run the report to see everything.**

	Total Amount	Making Charges	Paid Amount	Ornament	Gold/Silver Price	Billing: Item Id
1	\$7,900	\$900.00	\$95,000	Necklace	\$0.00	Item-08
2	\$5,030	\$30.00	\$90,000	Bracelet	\$0.00	Item-04
3	\$5,030	\$30.00	\$65,000	Ring	\$0.00	Item-07
4	\$10,500	\$1,500.00	\$80,000	Ring	\$0.00	Item-01
5	\$6,050	\$50.00	\$70,000	Ring	\$0.00	Item-02
6	\$1,500	\$1,500.00	\$75,000	Crown	\$0.00	Item-03
7	\$8,900	\$3,900.00	\$67,000	Ring	\$0.00	Item-06
8	\$5,900	\$900.00	\$78,000	Earing	\$0.00	Item-05
9	\$6,950	\$50.00	\$78,000	bracelet	\$0.00	Item-09
10	\$7,200	\$1,200.00	\$65,000	Chain	\$0.00	Item-10
11	\$64,960	\$10,060.00	\$763,000		\$0.00	

Click on Save and run

Save Report

(0)

\* Report Name  
Customer Naem

Report Unique Name

Report Description

- Enter the Report Name and Click on save.
- The report shows like this in the image below.

Report: Billings with Item  
**Customer Name**

Total Records	Total Total Amount	Total Amount
10	\$64,960	\$0.00
<input type="button" value="Total Amount"/> <input type="button" value="Amount"/> <input type="button" value="Billing: Item Id"/> <input type="button" value="Item: Item Id"/>		
1	\$10,500	\$0.00
2	\$1,500	\$0.00
3	\$5,030	\$0.00
4	\$5,900	\$0.00
5	\$8,900	\$0.00
6	\$6,950	\$0.00
7	\$7,900	\$0.00
8	\$7,200	\$0.00
9	\$6,050	\$0.00
10	\$5,030	\$0.00
11	\$64,960	\$0.00

- Create another two record.
- Follow the same steps.
- Record type as:
  1. Item with Billings.
  2. Billings with item and Customer order.

## XVII . Creating a Dashboard

- Go to the app click on the Dashboard tab.

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Dashboard 3		Private Dashboards	Harsh V	9/9/2025, 10:18 AM	
Dashboard 2		Private Dashboards	Harsh V	9/9/2025, 10:16 AM	
Dashboard 1		Private Dashboards	Harsh V	9/9/2025, 10:15 AM	

- Click on "NEW Dashboard".
- Enter the Name as "Dashboard 3".
- Click on Create.

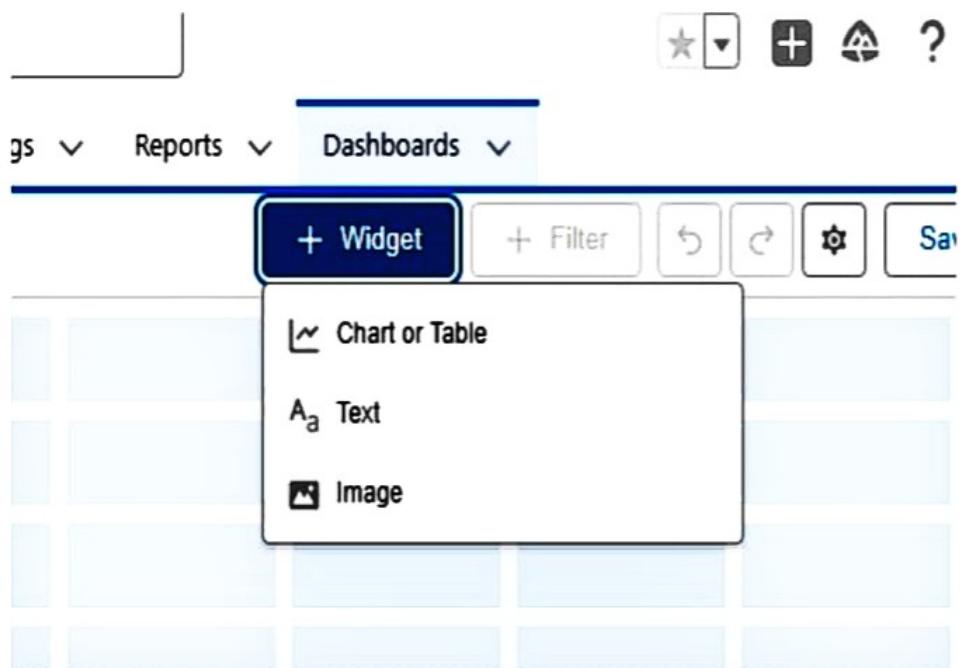
New Dashboard

\* Name  
Dashboard 3

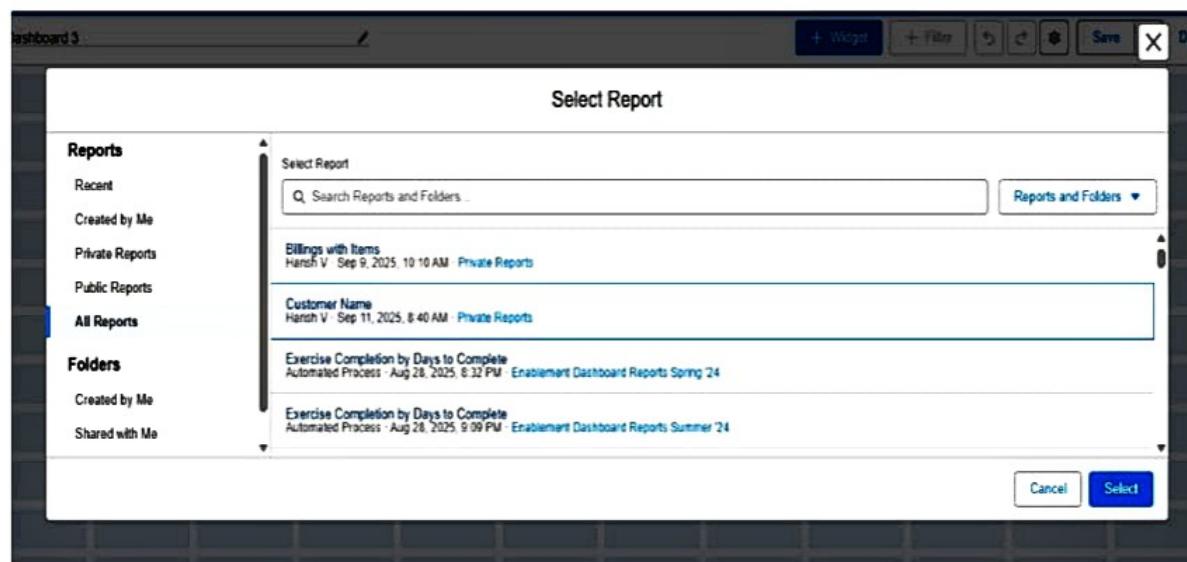
Description

Folder  
Private Dashboards

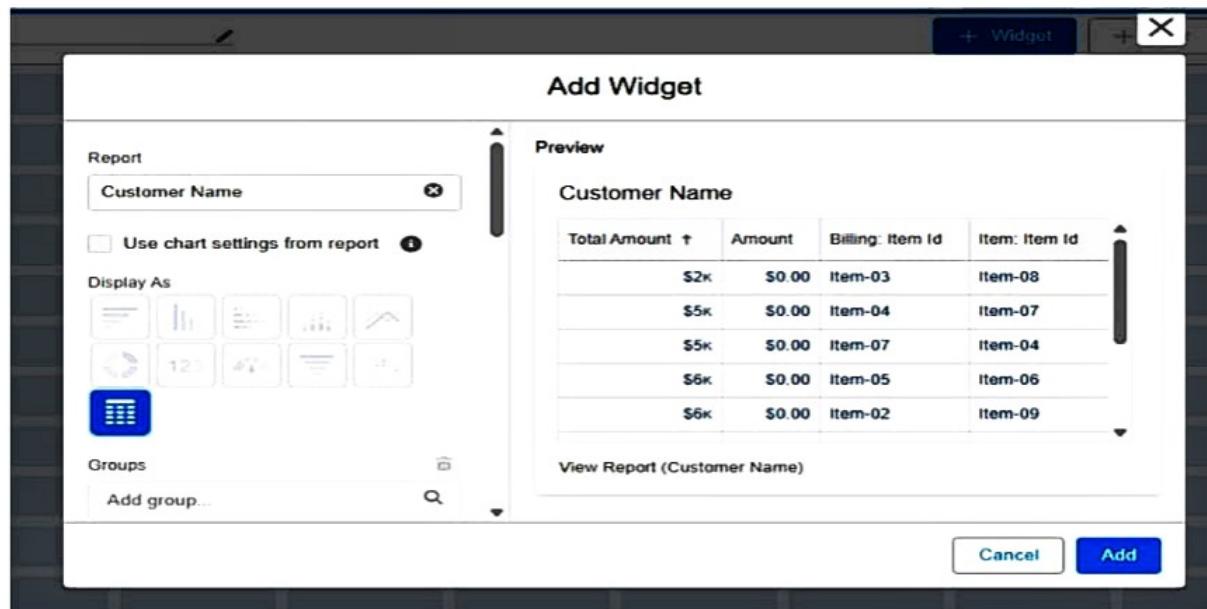
- Click on Widget and Select Chat and tables.



- Select the Report and Click on Select



- Select “LightningTable” and Click on “ADD”



Jewellery Inventory ...    Jewel Customers ▼    Customer Orders

Dashboard 3

Customer Name

Total Amount	Amount	Billing: Item Id	Item: Item Id
\$2k	\$0.00	Item-03	Item-08
\$5k	\$0.00	Item-04	Item-07
\$5k	\$0.00	Item-07	Item-04
\$6k	\$0.00	Item-05	Item-06
\$6k	\$0.00	Item-02	Item-09
\$7k	\$0.00	Item-09	Item-02
\$7k	\$0.00	Item-10	Item-01

[View Report \(Customer Name\)](#)

- Click on Save and Done

## XVIII . Creating Flow

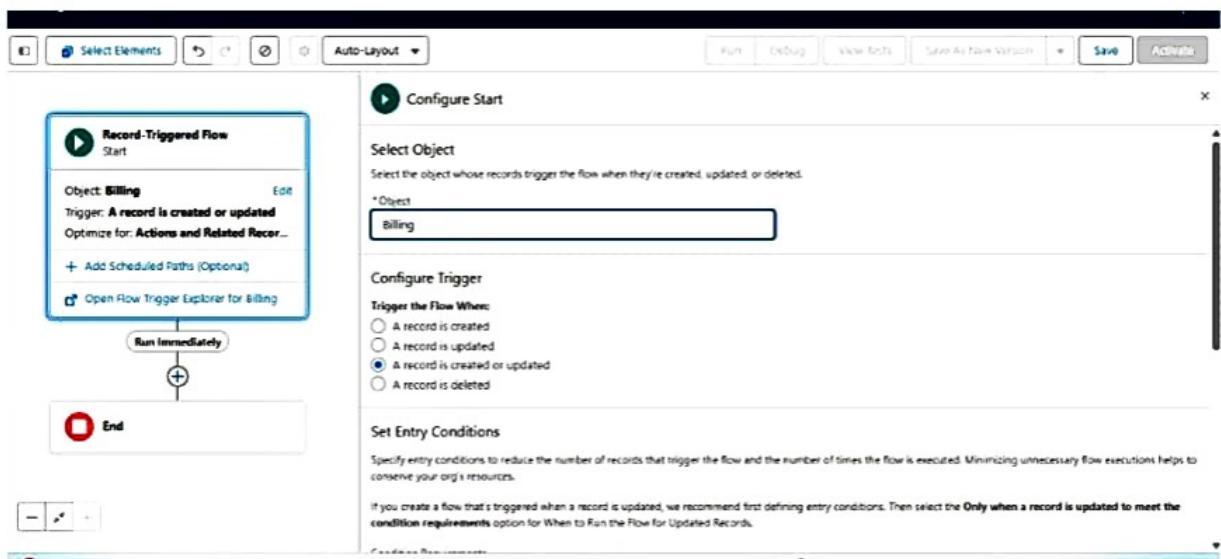
- In the set pages search for Flow in the “Quickfind Box”.

The screenshot shows the Salesforce Setup interface with the 'Flows' tab selected. On the left, there's a sidebar with categories like Apps, Einstein, Process Automation, and Flows. Under Flows, 'Flow Category' is expanded, showing 'Flow Creation with Einstein'. The main area displays a table titled 'Flow Definitions All Flows'. The columns include 'Flow Label', 'Process Type', 'A...', 'T...', 'Package State', 'Pa...', 'La...', and 'Last Modified...'. There are 50+ items listed, such as 'Add or Modify Service Appointment Attendees', 'Approvals Workflow Evaluate Approval Requests', and 'Basic Approval Request'.

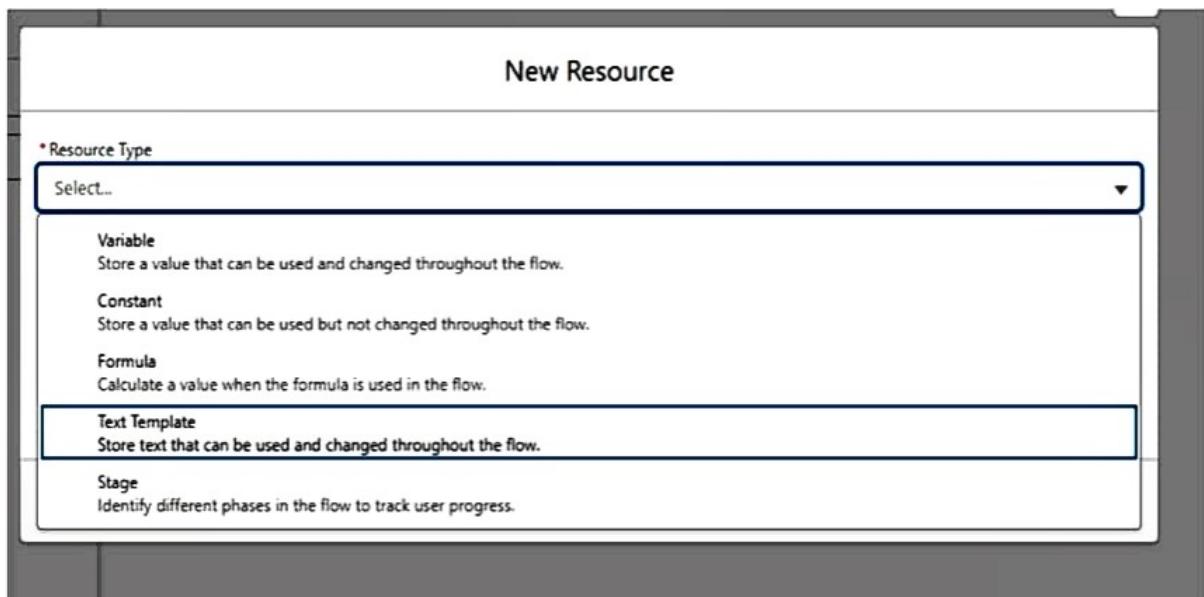
- Select New Flow.☒
- Select the Record-triggered flow and Click on Create

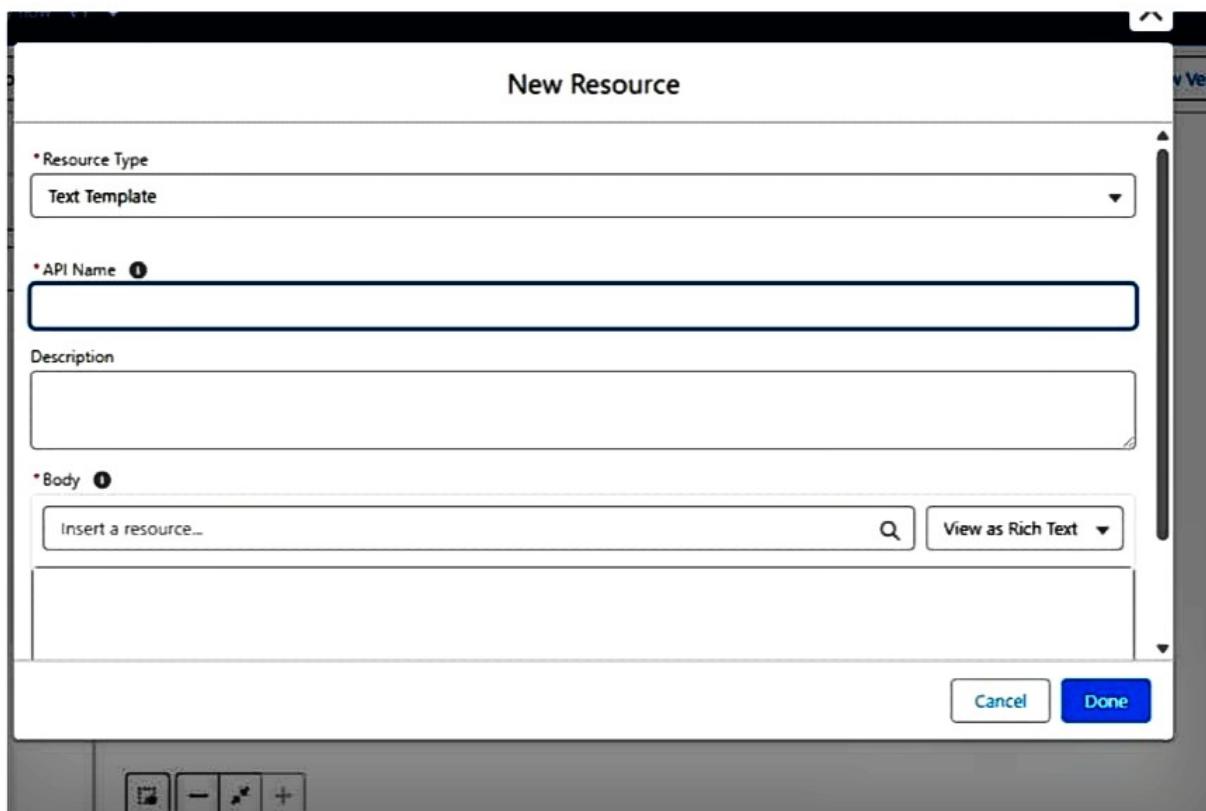
The screenshot shows the 'Flow Builder' window with the title 'New Automation'. It features a 'Get Started with Automations' section with a search bar. Below it are four categories: 'Triggered', 'Scheduled', 'Screen', and 'Autolaunched'. Each category has a description and a 'View All' link. Underneath these is a 'Frequently Used' section with four items: 'Record-Triggered Flow', 'Screen Flow', 'Schedule-Triggered Flow', and 'Autolaunched Flow (No Trigger)'. Each item has a brief description and a 'View All' link.

- Select the Object as a “Billing” in the dropdown list.☒
- Select the Trigger Flow when: “A record is Created or Updated”.☒
- Select the Optimise the flow for: “Actions and Related Records” and Click on Done.☒



- Change the mode Autolayout from Free-Form. ✅
- Now select the manager option in the toolbox, click New resource. ✅
- Select the resource type as Text template. ✅
- Select the Text template. ✅
- 





- In the API name enter as "Emailbody".
- In the Body enter this :

Hello

CustomerName:{!\$Record.Item\_r.Customer\_Name\_r.Name}

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

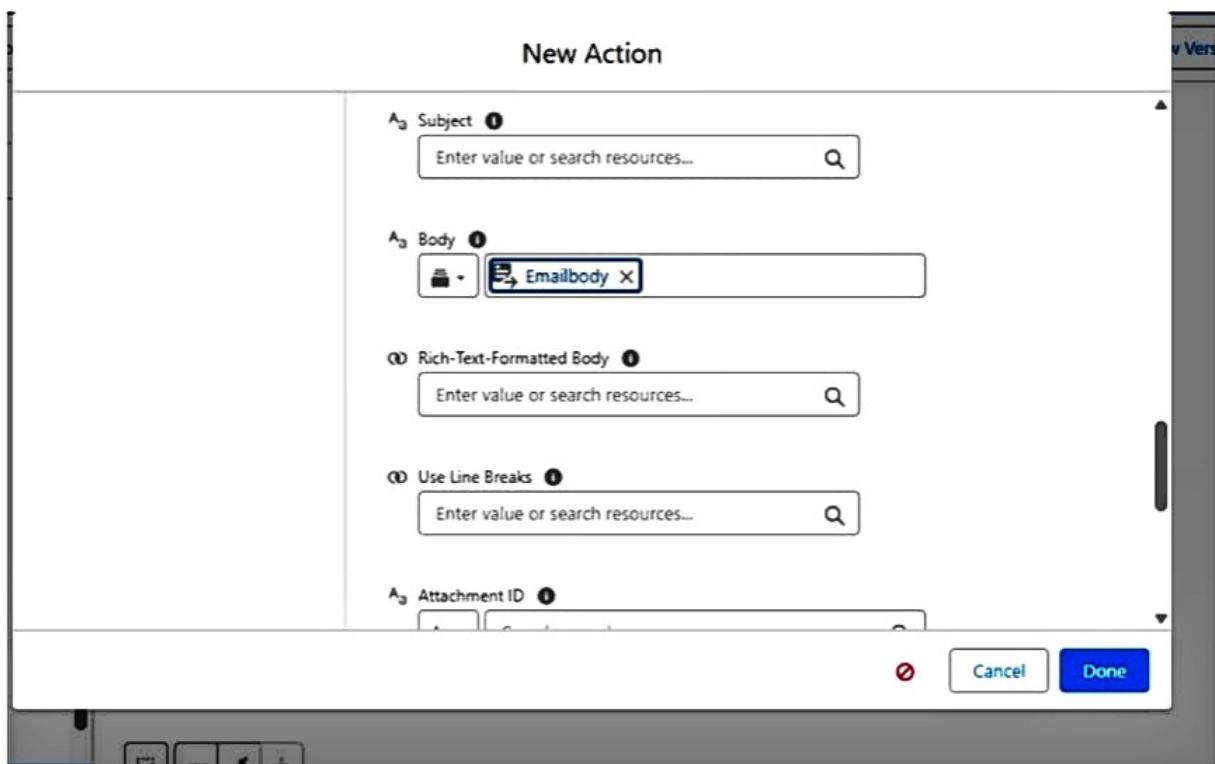
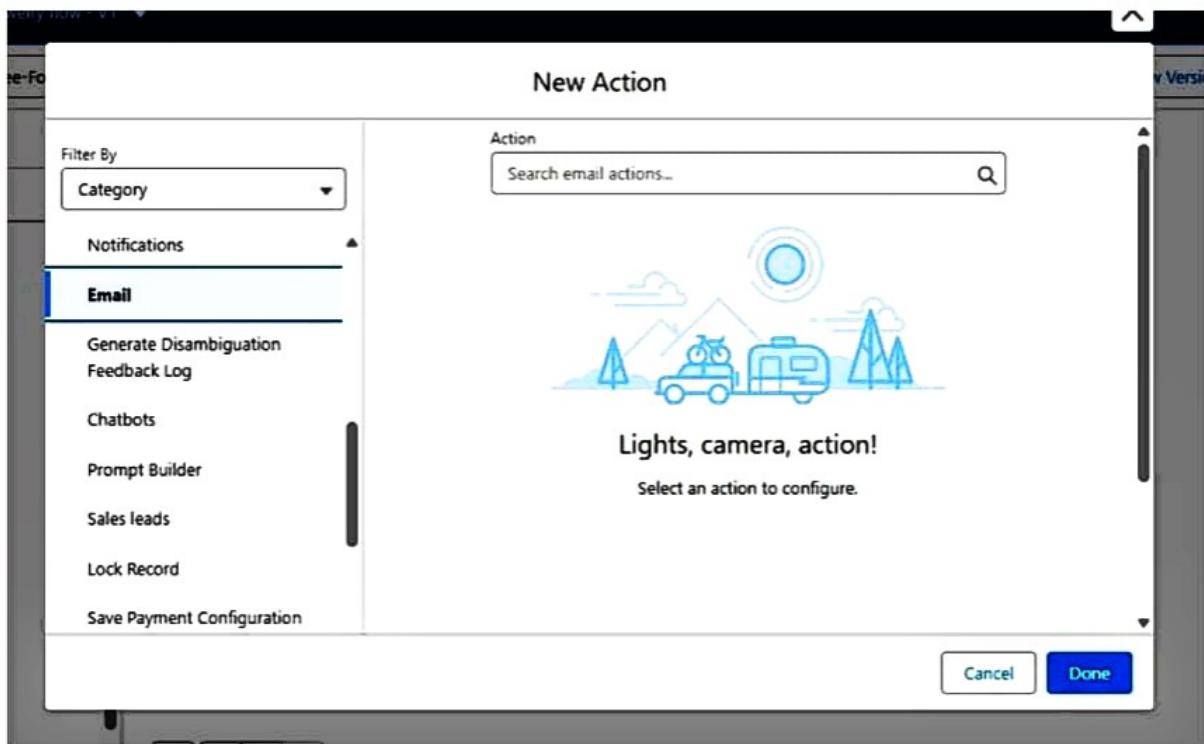
Item Type: {!\$Record.Item\_r.Item\_Type\_c}

Ornament: {!\$Record.Ornament\_c}

Weight: {!\$Record.Weight\_c} grams

Amount: {!\$Record.Amount\_c}

- Now click on Do nea nd Click on Element.
- Drag the Action to the panel.
- Their action bar will be opened in that search for "sendemail" and click on it.
- Give the label name as "notice"
- API name will be auto populated.
- Enable the body in set input values for the selected action.
- Select the text template that was created
- 
-



- Enter the recipient as: "Select triggering record then CustomerName > then Email field."
- Then click on done
- Now drag the path from the start to the action element.

- Click on save. Given the Flow label, Flow API name will be auto populated.
- And click save, and click on 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.

