

CRM Application for Jewel Management

COLLEGE : KG COLLEGE OF ARTS AND SCIENCE

TEAM ID : NM2025TMID23751

TEAM SIZE : 4

TEAM MEMBERS DETAILS:

TEAM LEADER : ROSHAN KUMAR R
EMAIL : 2326ka41@kgcas.com

TEAM MEMBER : RUBIKA S
EMAIL : 2326ka42@kgcas.com

TEAM MEMBER : SABTHAMI S
EMAIL : 2326ka43@kgcas.com

TEAM MEMBER : SAKTHIDASAN N
EMAIL : 2326ka44@kgcas.com

1. INTRODUCTION

1.1 Project Overview:

This project involves the development of a CRM-based Jewel Management System using Salesforce. It streamlines operations like inventory tracking, price updates, billing, and customer management for a jewellery business. The project leverages Salesforce Lightning Platform to design custom objects, automate processes using Flows, and generate actionable insights via dashboards and reports.

1.2 Purpose:

The purpose is to replace manual processes with an automated, cloud-based Salesforce CRM that enables real-time stock updates, dynamic pricing, customer billing, and order tracking. The system enhances customer experience, operational accuracy, and business decision-making.

The purpose of this project is to design and implement a Salesforce-based CRM solution specifically for jewel businesses to:

- Centralize customer information and communication.
- Track and manage jewellery inventory (gold and silver).
- Enable personalized marketing and offers.
- Facilitate efficient order processing and billing.
- Improve customer retention through engagement automation.
- Generate detailed reports on sales, trends, and staff performance.

2. IDEATION PHASE

2.1 Problem Statement:

Traditional jewellery shops face problems like manual stock maintenance, lack of customer records, and inefficiencies in pricing and billing. There's also no integrated view of customer interactions. This leads to errors, delayed decision-making, and customer

dissatisfaction.

Many small to mid-sized jewellery retailers struggle with managing customer relationships, tracking sales, handling special orders, and maintaining inventory. Current manual systems or generic software often fall short of addressing the industry's unique needs.

2.2 Empathy Map Canvas:

Think & Feel

- “Are we missing out on leads because we’re not following up?”
- “I need to know who our high-value customers are.”

Hear

- “The customer wasn’t happy with the delay in their custom order.”
- “Can we send reminders for anniversaries and birthdays?”

See

- Registers with scribbled orders.
- Multiple Excel sheets for billing and inventory.

Say & Do

- “Call them about the pendant order tomorrow.”
- “Print out last year’s top customers list.”

Pain

- Losing customers due to lack of follow-up.
- No real-time inventory tracking.

Gain

- Higher customer satisfaction.
- More repeat purchases via automation.

2.3 Brainstorming:

The brainstorming phase focused on collecting diverse ideas from stakeholders—including jewel store owners, sales representatives, developers, and end-users—to define potential solutions and functionalities required in the CRM application. This collaborative ideation process aimed to understand the operational bottlenecks in the jewelry business and how Salesforce's cloud ecosystem could streamline them.

Ideas collected during brainstorming:

- Use of custom objects for Items, Billing, Orders, and Customers.
- Automate stock management with flows.
- Dashboard for daily performance insights.
- Notifications for low inventory.
- Implement record-triggered and scheduled flows.
- Introduce validation rules to prevent data inconsistencies.
- Plan separate dashboards for different roles (sales, inventory, admin).

3. Requirement Analysis:

3.1 Customer Journey Map:

The customer journey map outlines the stages a customer experiences, from the first interaction to post-purchase engagement. It helps identify gaps and opportunities where the CRM can automate and enhance customer experience.

Awareness Stage

- Customer browses website or social media.
- CRM captures leads using Web-to-Lead forms.

Consideration Stage

- Customer visits the store or requests a catalog.
- Salesforce auto-assigns a sales representative.
- Email/SMS with product recommendations is triggered.

Purchase Stage

- Customer places an order (in-store or online).
- CRM logs order and creates a sales opportunity.
- Invoice is generated using built-in templates.

Delivery Stage

- Customer receives order.
- CRM sends order tracking notifications and confirmations.

Post-Purchase Stage

- Customer receives feedback form.
- Loyalty points are updated.
- Follow-up reminders for anniversaries, birthdays, etc.

3.2 Solution Requirements:

Defines both the functional (what the system should do) and non-functional (how the system performs) needs to fulfill business goals.

- Real-time item stock tracking
- Dynamic pricing management
- Billing with automated tax calculations
- Comprehensive dashboards and reports
- Data security and accessibility
- Integration with communication tools (email/SMS)
- Record ownership for audit and traceability

3.3 Data Flow Diagrams:

DFD illustrates how data moves between the system's components. This helps developers visualize dependencies and database interaction points.

Main Entities & Data Flow Points:

1. Customer submits a product inquiry.
2. Data flows to CRM Interface (Form or App).
3. CRM creates or updates Customer Object.
4. CRM logs sale and updates Sales Record.
5. Inventory count is adjusted in the Inventory Object.
6. Reports are updated to reflect real-time sales and stock.

3.4 Technology Stack:

Defines the tools and platforms used to develop, deploy, and manage the CRM system in Salesforce.

- Platform: Salesforce Lightning Experience.
- Logic: Apex Triggers, Validation Rules, Flow Builder.
- UI: Lightning Tabs, Pages, Reports, Dashboards.
- Database: Salesforce Standard & Custom Objects.
- Integration: Email Templates, Scheduled Flows, Approval Processes.

4.PROJECT DESIGN

4.1 Problem Solution Fit:

Problem: Manual processes and lack of centralized tracking

Solution: Salesforce CRM system automating every major jewelry workflow

4.2 Proposed Solution:

Five major custom objects: Item__c, Price__c, Jewel_Customer__c, Customer_Order__c, Billing__c

- Lightning app with navigation tabs
- Automated flows for inventory, billing, and notifications
- Dashboards visualizing sales, stock, and revenue performance

4.3: Solution Architecture:

Objects and Relationships:

- Jewel_Customer__c ↔ Customer_Order__c ↔ Billing__c ↔ Item__c ↔ Price__c
- Lookup and Master-Detail fields used to link records

- Formula fields for auto-calculations (e.g., total billing amount)
- Validation rules for quantity and price limits
- Record Types to distinguish Gold, Silver, and Diamond workflows

5. PROJECT PLANNING AND SCHEDULING

5.1 Project Planning:

The planning and scheduling phase involves defining the project's timeline, scope, team responsibilities, tools, and milestones. It ensures the project stays on track and aligns with business goals while delivering the CRM application in an efficient, scalable, and phased manner.

- Week 1: Requirement gathering, Use Case and ER Diagrams
- Week 2: Custom object creation, Page Layouts and Tab Setup
- Week 3: Flows and Automation Setup, Validation Rules
- Week 4: Reports and Dashboards, Testing and Review
- Week 5: Final Deployment, Documentation and User Training

6. PROJECT DEVELOPMENT PHASE - SALESFORCE GUIDED PROJECT

The development phase is the backbone of the CRM application, where core functionalities were implemented using Salesforce's declarative tools and programmatic capabilities. This phase was conducted in iterative sprints, following Agile methodology, and broken into several key activities.

6.1 Developer Environment Setup:

- Create Salesforce Developer Org via developer.salesforce.com/signup

Fill the required information, verify email, set password, and access Salesforce Setup.

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

Sign up for your Developer Edition.

- ✓ Build apps fast with drag-and-drop tools
- ✓ Go further with Apex code
- ✓ Build AI agents with Agentforce
- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs



Sign up for your Developer Edition

A free Salesforce Platform environment with Agentforce and Data Cloud

First name: Bobbadil Harshitha | Last name: Team

Job title: Salesforce Developer | Work email: bobbadiharshitha4@gmail.com

Company: Ideal Institute of Tech | Country/Region: India

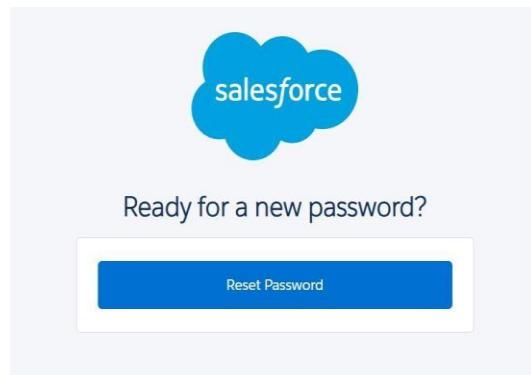
Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

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

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

I'm not a robot 

Sign Me Up





Change Your Password

Enter a new password for **streetcause178@sb.com**.

Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password

Good

* Confirm New Password

* Security Question

In what city were you born?

* Answer

*=required

Change Password

Password was last changed on 6/20/2025, 3:59 AM.

6.2 Custom Object Creation:

We create five main custom objects for Jewel Customer, Item, Customer Order, Price, Billing.

1. Jewel Customer

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A new object named 'Jewel Customer' is being created. The 'Details' tab is selected, showing the following configuration:

Setting	Value
Description	
API Name	Jewel_Customer__c
Custom	✓
Singular Label	Jewel Customer
Plural Label	Jewel Customers
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

The left sidebar lists other configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout.

2. Item

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The left sidebar lists various configuration options under 'Details'. The main 'Details' section shows the following configuration for the 'Item' object:

Description	
API Name	Item__c
Custom	✓
Singular Label	Item
Plural Label	Items
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons at the top right include 'Edit' and 'Delete'.

3. Customer Order

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The left sidebar lists various configuration options under 'Details'. The main 'Details' section shows the following configuration for the 'Customer Order' object:

Description	
API Name	Customer_Order__c
Custom	✓
Singular Label	Customer Order
Plural Label	Customer Orders
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons at the top right include 'Edit' and 'Delete'.

4. Price

The screenshot shows the Salesforce Setup interface for managing objects. The top navigation bar includes a cloud icon, a search bar labeled "Search Setup", and various global buttons. The main header says "SETUP > OBJECT MANAGER" and displays the object name "Price". On the left, a sidebar lists navigation options: 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, and List View Button Layout. The main content area is titled "Details" and contains the following fields:

Description	
API Name	Price_c
Custom	✓
Singular Label	Price
Plural Label	Prices
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons "Edit" and "Delete" are located in the top right corner of the details section.

5. Billing

The screenshot shows the Salesforce Setup interface for managing objects. The top navigation bar includes a cloud icon, a search bar labeled "Search Setup", and various global buttons. The main header says "SETUP > OBJECT MANAGER" and displays the object name "Billing". On the left, a sidebar lists navigation options: 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, and List View Button Layout. The main content area is titled "Details" and contains the following fields:

Description	
API Name	Billing_c
Custom	✓
Singular Label	Billing
Plural Label	Billings
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons "Edit" and "Delete" are located in the top right corner of the details section.

6.3 Creation of Tabs

We create five main custom tabs for Jewel Customer, Item, Customer Order, Price, Billing.

1. Jewel Customer

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with a search bar and links for 'Setup', 'Home', and 'Object Manager'. Under 'User Interface', the 'Tabs' link is selected. A message says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Custom Object Tab' and shows a tab named 'Jewel Customers' for the 'Jewel Customer' object. The 'Tab Style' is set to 'Airplane'. The 'Custom Tab Definition Detail' table includes columns for Tab Label (Jewel Customers), Object (Jewel Customer), Description, Created By (Bobbadli Harshitha Team), and Modified By (Bobbadli Harshitha Team). The creation date is 6/22/2025, 8:13 AM.

2. Item

The screenshot shows the Salesforce Setup interface. The sidebar and 'Tabs' selection are identical to the previous screenshot. The main content area is titled 'Custom Object Tab' and shows a tab named 'Items' for the 'Item' object. The 'Tab Style' is set to 'Alarm clock'. The 'Custom Tab Definition Detail' table includes columns for Tab Label (Items), Object (Item), Description, Created By (Bobbadli Harshitha Team), and Modified By (Bobbadli Harshitha Team). The creation date is 6/22/2025, 8:17 AM.

3. Customer Order

The screenshot shows the Salesforce Setup interface. The left sidebar has 'User Interface' expanded, with 'Tabs' selected. The main area is titled 'Customer Orders' and contains the following details:

Custom Tab Definition Detail	
Tab Label	Customer Orders
Object	Customer Order
Description	
Created By	Bobbadi Harshitha Team 6/22/2025, 8:19 AM
Modified By	Bobbadi Harshitha Team 6/22/2025, 8:19 AM

Buttons at the top right include 'Edit' and 'Delete'. A 'Tab Style' section shows 'Fan' is selected. A note at the bottom says 'Below is the information for the custom tab. Click Edit to change the custom tab.'

4. Price

The screenshot shows the Salesforce Setup interface. The left sidebar has 'User Interface' expanded, with 'Tabs' selected. The main area is titled 'Prices' and contains the following details:

Custom Tab Definition Detail	
Tab Label	Prices
Object	Price
Description	
Created By	Bobbadi Harshitha Team 6/22/2025, 8:20 AM
Modified By	Bobbadi Harshitha Team 6/22/2025, 8:20 AM

Buttons at the top right include 'Edit' and 'Delete'. A 'Tab Style' section shows 'Fan' is selected. A note at the bottom says 'Below is the information for the custom tab. Click Edit to change the custom tab.'

5.Billing

The screenshot shows the Salesforce Setup interface. On the left, the navigation bar includes 'Setup', 'Home', and 'Object Manager'. A sidebar on the left has sections for 'User Interface' (with 'Rename Tabs and Labels' and 'Tabs' selected), 'Customize Home Page', 'Customize Navigation', and 'Customize Record Types'. A search bar at the top says 'Search Setup'. The main content area is titled 'SETUP Tabs' and shows a 'Custom Object Tab' named 'Billings'. It includes fields for 'Tab Label' (Billings), 'Object' (Billing), 'Description' (Blank), 'Created By' (Bobbadi Harshitha Team), and 'Modified By' (Bobbadi Harshitha Team). The 'Tab Style' is set to 'Boat'. A note below says 'Below is the information for the custom tab. Click Edit to change the custom tab.' There is also a 'Help for this Page' link.

So we get the required all custom tabs as below

The screenshot shows the Salesforce Setup interface with the 'Tabs' section selected in the sidebar. The main content area is titled 'Custom Tabs'. It contains a note: '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 web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.' Below this is a table titled 'Custom Object Tabs' with columns for 'Action', 'Label', 'Tab Style', and 'Description'. The table lists five tabs: 'Billings' (Boat style), 'Customer Orders' (Bell style), 'Items' (Alarm clock style), 'Jewel Customers' (Airplane style), and 'Prices' (Fan style). At the bottom, there is a section titled 'Web Tabs' with a note: 'No Web Tabs have been defined.'

Action	Label	Tab Style	Description
Edit Del	Billings	Boat	
Edit Del	Customer Orders	Bell	
Edit Del	Items	Alarm clock	
Edit Del	Jewel Customers	Airplane	
Edit Del	Prices	Fan	

6.4 Creation of Lightning App

App Name: Jewelry Inventory System

The screenshot displays two main sections of the Salesforce interface.

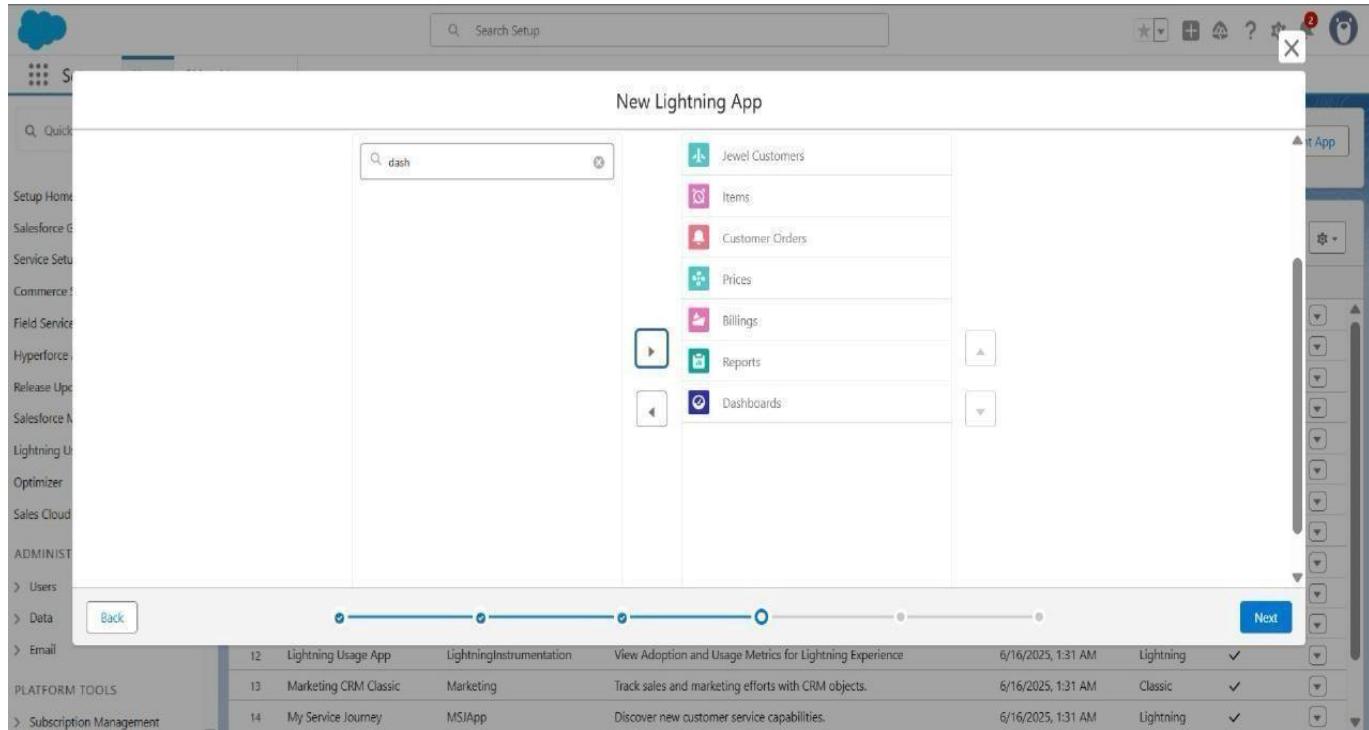
Lightning App Builder (Top Section):

- Header:** Shows the title "Lightning App Builder", "App Settings", "Pages", and the app name "jewelry Inventory System".
- Left Sidebar:** Titled "App Settings" with sub-options: "App Details & Branding", "App Options", "Utility Items (Desktop Only)", "Navigation Items", "Navigation Rules", and "User Profiles".
- Right Content Area:** "App Details & Branding" section.
 - App Details:** Fields include "App Name" (jewelry Inventory System), "Developer Name" (jewelry_Inventory_System), and "Description" (Elevate your look with elegance).
 - App Branding:** Includes an "Image" field with a blue square icon, a color picker set to "#0070D2", and a "Primary Color Hex Value" field (#0070D2).
 - Org Theme Options:** A checkbox for "Use the app's image and color instead of the org's custom theme".
 - App Launcher Preview:** Shows a preview card with the app logo (blue square with "jl"), the app name "jewelry Inventory System", and the description "Elevate your look with elegance".

Setup Home (Bottom Section):

- Header:** Shows the title "New Lightning App" and a "Next" button.
- Left Sidebar:** Shows a navigation tree with categories like "Setup Home", "Salesforce", "Service", "Commerce", "Field Service", "Hyperforce", "Release Up", "Salesforce N", "Lightning U", "Optimizer", "Sales Cloud", "ADMINIST", "Users", "Data", "Email", "PLATFORM TOOLS", and "Subscription Management".
- Right Content Area:** "App Options" section.
 - Navigation and Form Factor:** "Navigation Style" is set to "Console navigation". "Supported Form Factors" are "Desktop and phone".
 - Setup and Personalization:** "Setup Experience" is set to "Setup (full set of Setup options)". "App Personalization Settings" includes checkboxes for "Disable end user personalization of nav items in this app", "Clear workspace tabs for each new console session", and "Use Omni-Channel sidebar".

Navigation Items



6.5 Creation of Fields

1.Creating lookup relationship

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

The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "Customer Order New Relationship". Step 3 of 6 is displayed, titled "Step 3. Enter the label and name for the lookup field". The form fields include:

- Field Label:** Customer
- Field Name:** Customer
- Description:** (empty)
- Help Text:** (empty)
- Child Relationship Name:** Customer_Orders
- Required:** Always require a value in this field in order to save a record
 Clear the value of this field. You can't choose this option if you make this field required.
- What to do if the lookup record is deleted?** Don't allow deletion of the lookup record that's part of a lookup relationship.
 Add this field to existing custom report types that contain this entity
- Auto add to custom report type:** (checkbox checked)

Buttons at the bottom right include Previous, Next, and Cancel.

The screenshot shows the continuation of the relationship creation process. Step 6 of 6 is displayed, titled "Step 6. Add custom related lists". The form fields include:

- Field Label:** Customer
- Data Type:** Lookup
- Field Name:** Customer
- Description:** (empty)
- Related List Label:** Customer Orders
- Select Page Layouts:** Jewel Customer Layout
- Append related list to users' existing personal customizations:**

Buttons at the bottom right include Previous, Save & New, Save, and Cancel.

2. Creating a Master-Detail Relationship

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

SETUP > OBJECT MANAGER
Customer Order

Customer Order
New Relationship

Step 5 of 6

Field Label: Item
Data Type: Master-Detail
Field Name: Item
Description:

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Field: Page Layout Name
 Customer Order Layout

Previous Next Cancel

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
List View Button Layout
Restriction Rules
Scoping Rules

SETUP > OBJECT MANAGER
Customer Order

Customer Order
New Relationship

Step 6 of 6

Field Label: Item
Data Type: Master-Detail
Field Name: Item
Description:

Specify the title that the related list will have in all of the layouts associated with the parent.
Related List Label: Customer Orders

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List: Page Layout Name
 Item Layout

Append related list to users' existing personal customizations

Previous Save & New Save Cancel

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
List View Button Layout
Restriction Rules
Scoping Rules

3. Creating Text Field in Jewel Customer Object

The screenshot shows the Salesforce Setup interface for creating a new custom field. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Jewel Customer' under 'New Custom Field'. The left sidebar lists various configuration options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules.

Step 2. Enter the details (Step 2 of 4)

Field Label: City

Length: 20

Field Name: City

Description: (empty)

Help Text: (empty)

Required: Always require a value in this field in order to save a record

Unique: Do not allow duplicate values
 Treat "ABC" and "abc" as duplicate values (case insensitive)
 Treat "ABC" and "abc" as different values (case sensitive)

External ID: Set this field as the unique record identifier from an external system

Auto add to custom report type: Add this field to existing custom report types that contain this entity

Buttons at the bottom right: Previous, Next, Cancel

The screenshot shows the Salesforce Setup interface for creating a new custom field named 'City' for the 'Jewel Customer' object. The field is defined as a Text type with a label 'City'. It is being added to the 'Jewel Customer Layout'. The interface includes a sidebar with various setup options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages.

Field Label: City
Data Type: Text
Field Name: City
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
 Add Field Page Layout Name
 Jewel Customer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Step 4 of 4

Previous Save & New Save Cancel

4. Creating the Phone field in object Jewel Customer

The screenshot shows the Salesforce Setup interface for creating a new custom field named 'Phone' for the 'Jewel Customer' object. The field is defined as a Phone type with a label 'Phone'. It is being added to the 'Jewel Customer Layout'. The interface includes a sidebar with various setup options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages.

Field Label: Phone
Data Type: Phone
Field Name: Phone
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
 Add Field Page Layout Name
 Jewel Customer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Step 4 of 4

Previous Save & New Save Cancel

5. Creating the Email field in object Jewel Customer

The screenshot shows the Salesforce Setup interface for creating a new custom field named 'Email' for the 'Jewel Customer' object. The 'Fields & Relationships' tab is selected. Step 4 of 4 is shown, titled 'Add to page layouts'. The field details are: Field Label: Email, Data Type: Email, Field Name: Email. The 'Add Field - Page Layout Name' section contains two checked options: 'Add Field - Page Layout Name' and 'Jewel Customer Layout'. A note says: 'Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.' Below the layout selection is a note: 'To change the location of this field on the page, you will need to customize the page layout.' At the bottom, there are buttons for 'Previous', 'Save & New', 'Save', and 'Cancel'.

6. Creating the number field in Item object

The screenshot shows the Salesforce Setup interface for creating a new custom field named 'Purity' for the 'Item' object. The 'Fields & Relationships' tab is selected. Step 4 of 4 is shown, titled 'Add to page layouts'. The field details are: Field Label: Purity, Data Type: Number, Field Name: Purity. The 'Add Field - Page Layout Name' section contains two checked options: 'Add Field - Page Layout Name' and 'Item Layout'. A note says: 'Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.' Below the layout selection is a note: 'To change the location of this field on the page, you will need to customize the page layout.' At the bottom, there are buttons for 'Previous', 'Save & New', 'Save', and 'Cancel'.

7. Creating Picklist Field in Item Object

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar is titled 'Fields & Relationships' under 'Item'. The main area is titled 'New Custom Field' and is on 'Step 4, Add to page layouts'. The field details are:

Field Label	Item Type
Data Type	Picklist
Field Name	Item_Type
Description	(empty)

Below the field details, it says: "Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout." There are two checkboxes: "Add Field" (checked) and "Page Layout Name" (checked). A note says: "When finished, click Save & New to create more custom fields, or click Save if you are done." At the bottom right are buttons: Previous, Save & New, Save, and Cancel.

8. Creating Currency Field in Price Object

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar is titled 'Fields & Relationships' under 'Price'. The main area is titled 'New Custom Field' and is on 'Step 3, Establish field-level security'. The field details are:

Field Label	Gold Price
Data Type	Currency
Field Name	Gold_Price
Description	(empty)

Below the field details, it says: "Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field level security." A table lists profiles with checkboxes for 'Visible' and 'Read Only':

Field-Level Security for Profile	Visible	Read Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

9. Creating Formula Field(Cross Object) in Item Object

The screenshot shows the Salesforce Setup interface for creating a new field. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Item' under 'Fields & Relationships'. A formula editor is open, showing the formula `Gold Price = Gold Price / 10`. The formula bar includes 'Simple Formula' and 'Advanced Formula' tabs, and buttons for 'Insert Field', 'Insert Operator', and 'Functions'. A sidebar on the right provides 'Quick Tips' for getting started and using operators/functions.

The screenshot shows the configuration of a new custom field named 'Gold Price'. The left sidebar shows the 'Item' section under 'Fields & Relationships'. The main area is titled 'New Custom Field' and is on 'Step 5. Add to page layouts'. It shows the field's details: Field Label 'Gold Price', Data type 'Formula', Field Name 'Gold_Price', and Description. Below this, it says 'Select the page layouts that should include this field.' and lists 'Page Layout Name' and 'Item Layout' with checkboxes. At the bottom, there are buttons for 'Previous', 'Save & New', 'Save', and 'Cancel'.

10. Creating Remaining Fields in Objects

Creating remaining fields in the objects

1.Jewel Customer : State, Street, Country, Zip/Postal code

SETUP > OBJECT MANAGER

Jewel Customer

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City_c	Text(20)		
Country	Country_c	Text(16)		
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Email	Email_c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone_c	Phone		

2.Price : Silver Price

SETUP > OBJECT MANAGER

Price

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Gold Price	Gold_Price_c	Currency(8, 5)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
price Id	Name	Auto Number		✓
Silver Price	Silver_Price_c	Currency(8, 5)		

3.Item : Field Label-Customer Name, Ornament, Weight, Stone Weight, Percentage, Stone/Other Price, Expected Days of Return, Priority, Silver Price, Purity Gold Price, Total weights, Amount, KDM, Making Charges.

Item

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

4.Customer Order: Order Status

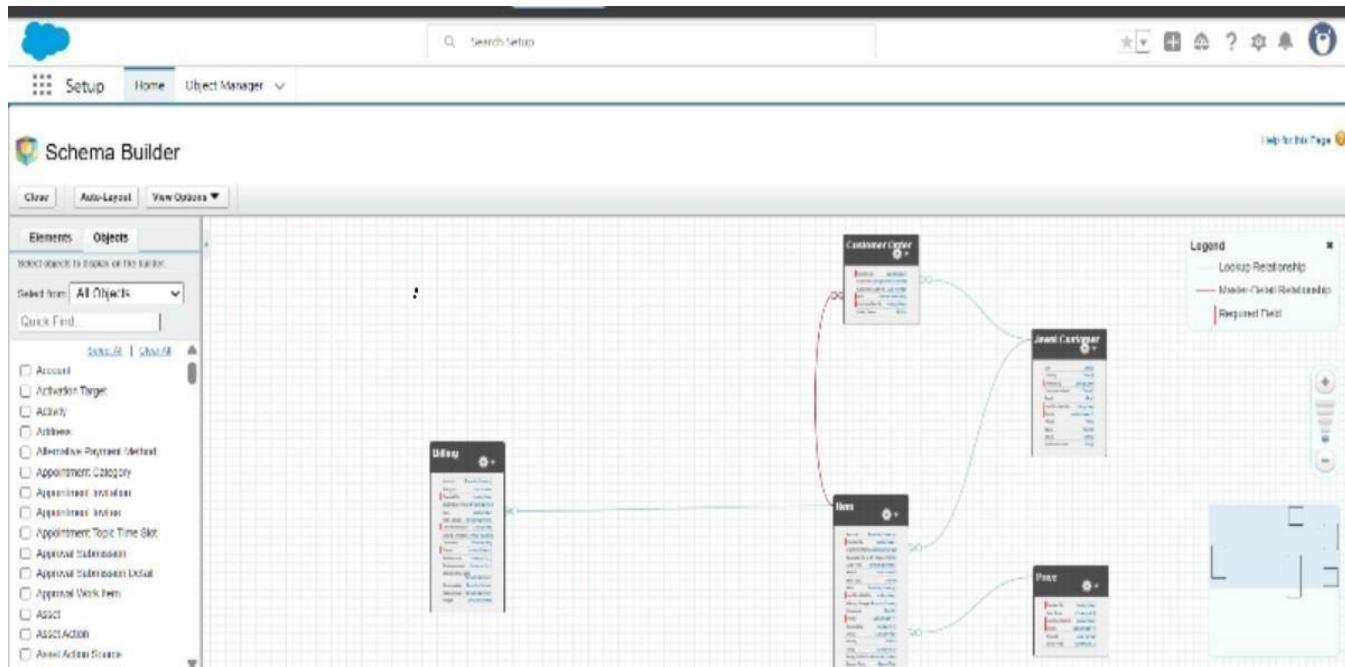
Customer Order

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Customer	Customer_c	Lookup(Jewel Customer)		✓
Customer Order Id	Name	Auto Number		✓
Item	Item_c	Master-Detail[Item]		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Order Status	Order_Status__c	Picklist		

5.Billing: Field Label-Item, Ornament, Stone Weight, Weight, Amount, Gold/Silver Price, KDM Charge, Making Charges,Stone/Other Price, Total Amount.

Fields & Relationships				
	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Billing Id	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Gold/Silver Price	Gold_Silver_Price_c	Formula (Currency)		
Item	Item_c	Lookup(Item)		✓
KDM Charge	KDM_Charge_c	Formula (Currency)		
Last Modified By	LastModifiedById	Lookup(User)		
Making Charges	Making_Charges_c	Formula (Currency)		

11. Creation of Schema Builder



12. Creation of Field Dependencies

13. Creation of Validation Rules

The screenshot shows the Salesforce Setup interface for creating validation rules. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Item' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various layout-related options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Item Field Dependencies' and contains a table with one row:

Action	Controlling Field	Dependent Field	Modified By
Edit Del	Priority	Expected Days Of Return	Bobbadi Harshitha Team, 6/23/2025, 6:33 AM

The screenshot shows the 'Jewel Customer' object in the Salesforce Object Manager. On the left, a sidebar lists various configuration options: 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, and List View Button Layout. The main content area is titled 'Jewel Customer Validation Rule'. It displays the 'Validation Rule Detail' for the rule named 'Postal_Code'. The rule is active and uses an AND error condition formula: OR(LEN(Zip_Postal_code__c)<=6, NOT(REGEX(Zip_Postal_code__c, "[0-9]{5}S"))). The error message is 'Must contain 6 digits'. The 'Error Location' is set to 'Zip/Postal code'. The rule was created by 'Bobbadil Harshitha Team' on 6/23/2025, 6:58 AM and modified by the same team on the same date and time.

This screenshot shows a validation rule for the 'JewelCustomerObject'. The sidebar on the left includes all the same options as the previous screenshot. The main content area is titled 'Jewel Customer Validation Rule'. It displays the 'Validation Rule Detail' for the rule named 'ValidationRule_for_JewelCustomerObject'. This rule is also active and uses an OR error condition formula: OR(ISBLANK(City__c), ISBLANK(Country__c), ISBLANK(Phone__c), ISBLANK(State__c), ISBLANK(Street__c)). The error message is 'Please fill required fields'. The 'Error Location' is set to 'Top of Page'. The rule was created by 'Bobbadil Harshitha Team' on 6/23/2025, 7:00 AM and modified by the same team on the same date and time.

6.6 Creation of Profiles

We create the goldsmith profile and the worker profile

The screenshot shows the Salesforce Setup interface with the 'Profiles' section selected. The main content area displays the 'Worker Profile' configuration. Key details include:

- Name:** Worker Profile
- User License:** Salesforce Platform
- Description:** (empty)
- Created By:** Bobbadi Harsihita Team (6/23/2025, 7:31 AM)
- Modified By:** Bobbadi Harsihita Team (6/24/2025, 10:42 AM)

Page Layouts

Object	Global	Lead
Email Application	Not Assigned	Lead Layout [View Assignment]
Home Page Layout	Home Page Default	Location Layout [View Assignment]
Account	Account Layout	Location Group Layout [View Assignment]
		Location Group Assignment Layout [View Assignment]

6.7 Creation of Roles

The screenshot shows the Salesforce Setup interface with the 'Roles' section selected. The main content area displays the 'Ideal Institute of Technology' role hierarchy. Key roles listed include:

- CEO**
- CFO**
- COO**
- Gold Smith**
- Worker**
- SVP, Customer Service & Support**
- Customer Support, International**
- Customer Support, North America**

Feature Settings

- Sales**
 - Contact Roles on Contracts
 - Contact Roles on Opportunities
- Service**
 - Case Teams**
 - Case Team Roles
 - Contact Roles on Cases

6.8 Creation of Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Farmer	Chatter	chatty.00ge000000vnguo.azpxsup0mm@chatter.saleforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	ERIC_OrgFarm	ERIC	eric.41b2c97a452@orgfarm.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Mikael_Kol	Mikael	mikael@gmail.com	Worker	<input checked="" type="checkbox"/>	Worker Profile
<input type="checkbox"/>	Mikaelson_Niklaus	Nikson	niklson@gmail.com	Gold Smith	<input checked="" type="checkbox"/>	Gold Smith
<input type="checkbox"/>	Team_Bobbadil_Harsihha	bob	bobbadilharsihha974@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User_Integration	integ	integration@000da00000vnguo.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00dpx00000synguo.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

6.9 Creation of Page Layouts

We create the page layouts for gold and silver items

Field Name	Customer Name	Item Type	Ornament	Priority	Silver Price	Weight
Section		KDM	Owner	Purity	Stone/Other Price	
Blank Space	Expected Days Of ...					
Amount	Gold Price	Last Modified By	Percentage	Purity Gold Price	Stone Weight	
Created By	Item Id	Making Charges	Prices	Record Type	Total Weight	

6.10 Creation of Record Types

We create the gold an silver records

The screenshot shows the Salesforce Object Manager interface. The left sidebar has a 'Record Types' section selected under 'Object Manager'. The main area displays a table titled 'Record Types' with two items: 'Gold' and 'Silver'. The 'Gold' record has a description of 'Gold items information' and was modified by 'Bobbadi Harshitha Team' on 6/25/2025, 4:27 AM. The 'Silver' record has a description of 'Silver items information' and was modified by 'Bobbadi Harshitha Team' on 6/23/2025, 12:15 PM.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	Bobbadi Harshitha Team, 6/25/2025, 4:27 AM
Silver	Silver items information	✓	Bobbadi Harshitha Team, 6/23/2025, 12:15 PM

6.11 Creation of Permission Sets

The screenshot shows the Salesforce Setup page. The left sidebar has a 'Permission Sets' section selected under 'Users'. The main area displays a 'Permission Set Overview' for a permission set named 'Per to Worker'. The API name is 'Per_to_Worker'. The 'Description' field is empty, and the 'License' field shows 'Session Activation Required: '. The 'Namespace Prefix' is empty, and the 'Created By' and 'Last Modified By' fields show 'Bobbadi Harshitha Team' on 6/23/2025, 12:18 PM and 6/23/2025, 12:22 PM respectively. The 'Apps' section lists several settings: 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', and 'Apex Class Access'.

6.12 Creation of Trigger

The screenshot shows the Salesforce IDE interface with the code editor open. The file name is `UpdatePaidAmountTriggerHandler.apxc`. The code implements a trigger handler for the `Billing__c` object. It contains a static method `handleBeforeInsert` that loops through a list of new `Billing__c` records and updates the `Paid_Amount__c` field to match the `Paying_Amount__c` field.

```
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
UpdatePaidAmountTriggerHandler.apxc
Code Coverage: None ▾ API Version: 64 ▾ Go To
1 public class UpdatePaidAmountTriggerHandler {
2
3     public static void handleBeforeInsert(List<Billing__c> newBillings) {
4
5         for (Billing__c billing : newBillings) {
6
7             billing.Paid_Amount__c = billing.Paying_Amount__c;
8
9         }
10    }
11 }
12
13
Logs Tests Checkpoints Query Editor View State Progress Problems
Name Line Problem
```

Developer Console - Google Chrome

orgfarm-bf8eee1d18-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

UpdatePaidAmountTriggerHandler.apxc **UpdatePaidAmountTrigger.apxt**

Code Coverage: None API Version: 64 Go To

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

Logs Tests Checkpoints Query Editor View State Progress Problems

Name Line Problem

INDEXED

6.13 Creation of User Adoption

We create item,price,customer orders,jewel customers and billing

The screenshot shows a web-based application interface for managing inventory. At the top, there is a navigation bar with a blue cloud icon, the text "jewelry Inventory Sy...", and a "Prices" tab. Below the navigation bar is a search bar labeled "Search...". On the right side of the header are various icons for "New", "Import", "Change Owner", and "Assign Label". The main content area is titled "Recently Viewed" and shows a list of 10 items, each with a checkbox and a name: Price-10, Price-09, Price-08, Price-07, Price-06, Price-05, Price-04, Price-03, Price-02, and Price-01. Each item has a dropdown arrow icon to its right. A "Search this list..." input field and a set of filter and sort icons are located at the bottom of the list.

The screenshot shows a web-based application interface for managing customer information. At the top, there is a navigation bar with a blue cloud icon, the text "jewelry Inventory Sy...", and a "Jewel Customers" tab. Below the navigation bar is a search bar labeled "Search...". On the right side of the header are various icons for "New", "Import", "Change Owner", and "Assign Label". The main content area is titled "Recently Viewed" and shows a list of 10 items, each with a checkbox and a name: Arjun, Joshua, Anand, Krishna, Sita, Nani, Shyamala, Manasa, Ravi, and Devi. Each item has a dropdown arrow icon to its right. A "Search this list..." input field and a set of filter and sort icons are located at the bottom of the list.

6.14 Creation of Reports

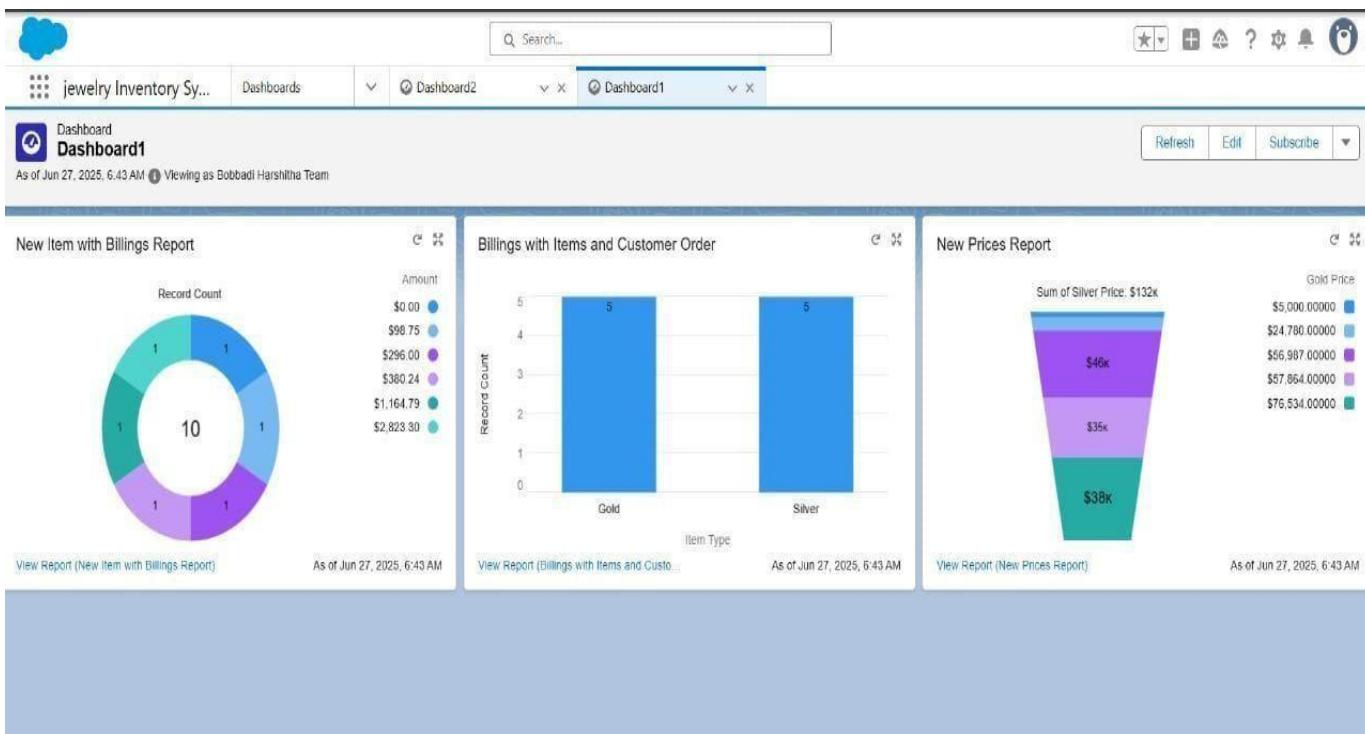
The screenshot shows a web-based reporting application interface. At the top, there is a header bar with a blue cloud icon, the text "jewelry Inventory Sy...", a search bar labeled "Search...", and various navigation icons. Below the header, the main area is titled "Recent" and displays a list of three reports:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Billings with Items and Customer Order	Private Reports	Bobbadi Harshitha Team	6/25/2025, 10:44 AM	<input type="checkbox"/>	
Created by Me	New Item with Billings Report	Private Reports	Bobbadi Harshitha Team	6/25/2025, 10:43 AM	<input type="checkbox"/>	
Private Reports	New Prices Report	Private Reports	Bobbadi Harshitha Team	6/25/2025, 9:56 AM	<input type="checkbox"/>	

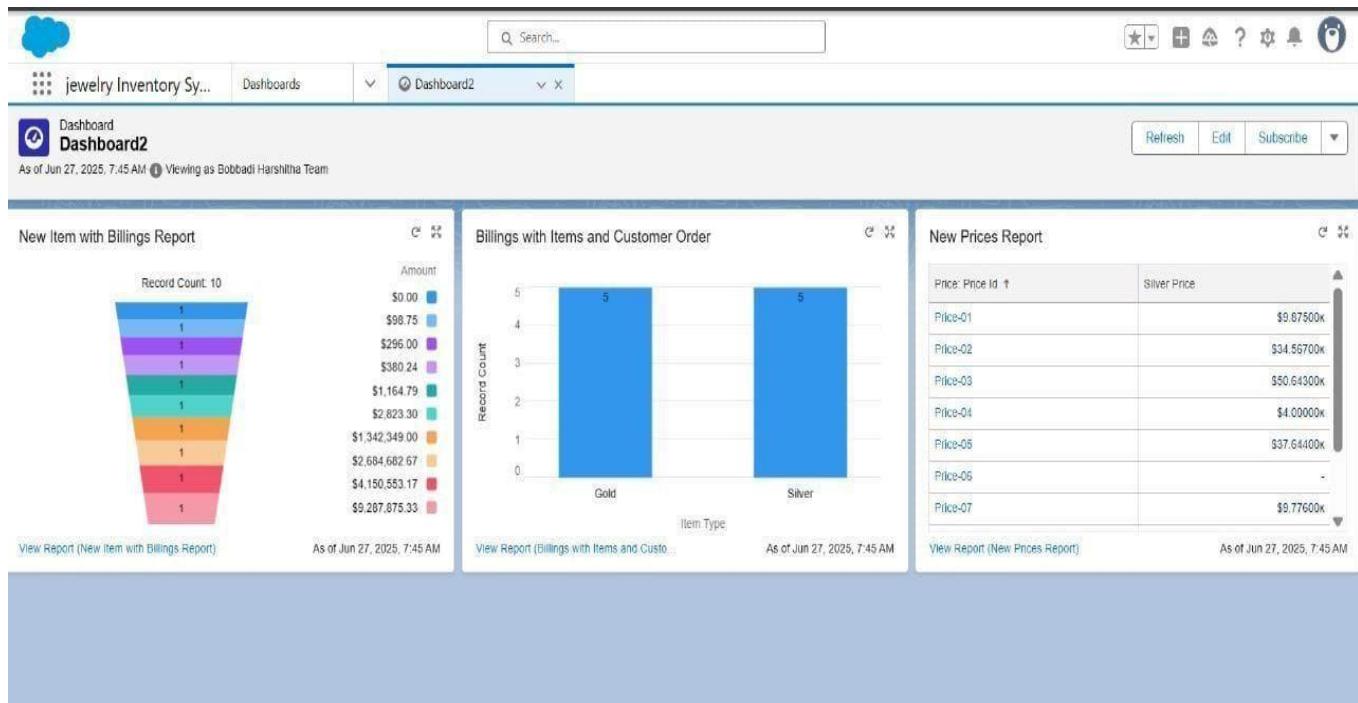
On the left side, there is a sidebar with categories: "Reports", "Recent" (selected), "Created by Me", "Private Reports", "Public Reports", "All Reports", "Folders", "All Folders", "Created by Me", "Shared with Me", and "Favorites". Under "Favorites", there is a link to "All Favorites".

6.15 Creation of Dashboards

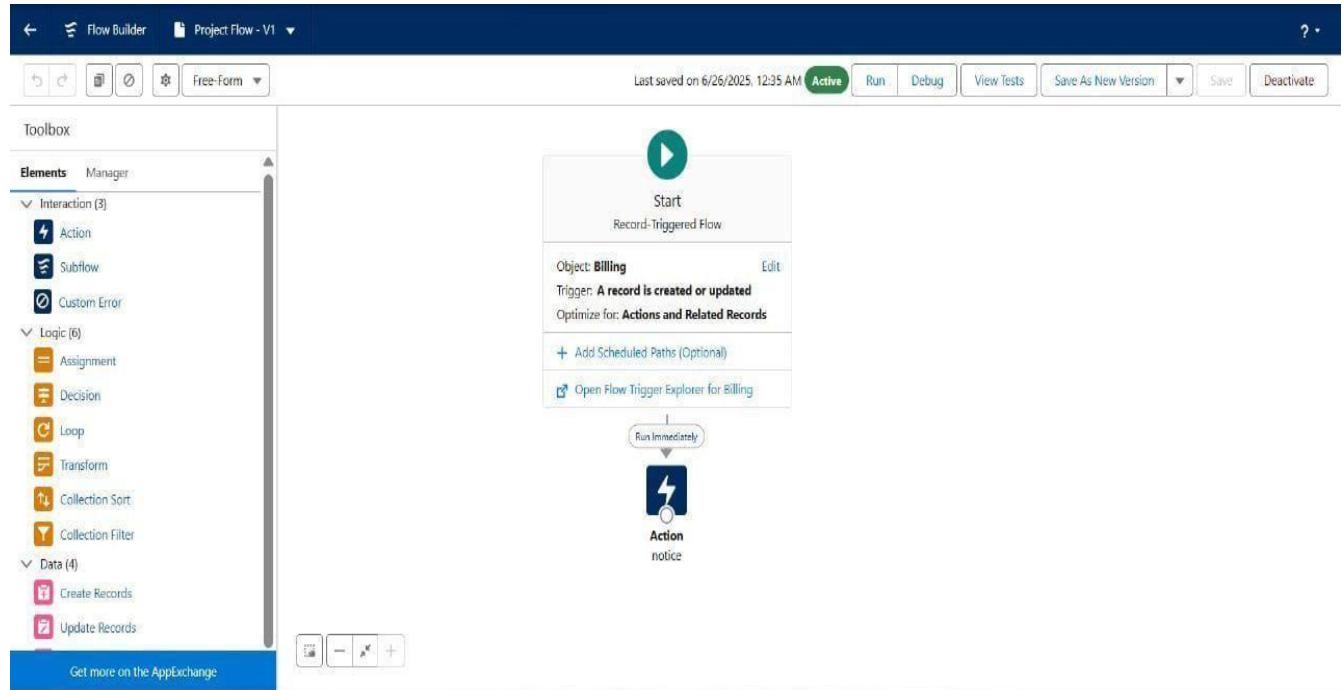
Dashboard 1



Dashboard 2

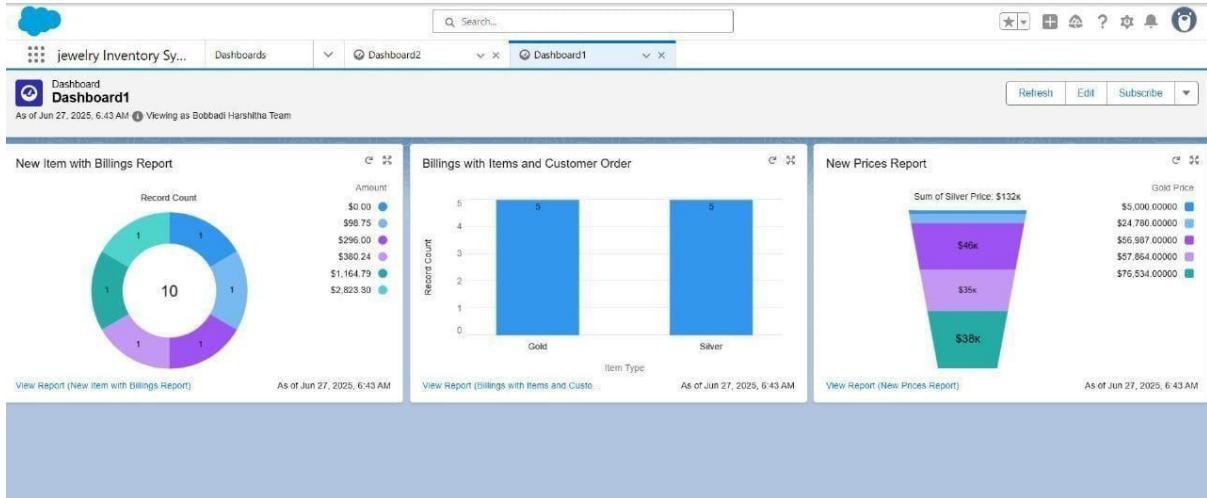


6.16 Creation of Flows



7. FUNCTIONAL AND PERFORMANCE TESTING

Dashboard-1:



Performance Observations (Phase Testing) for Dashboard-1:

1. Accurate Data Visualization

All three charts (donut, bar, funnel) rendered correctly with real-time values.

Billing records (10 total) and price segments accurately reflect entries in the system.

Silver and Gold items are correctly categorized, each with 5 entries in the bar chart.

2. Functional Report Integration

"View Report" links under each chart are working and redirect to detailed Salesforce reports, confirming backend connectivity and report mapping is functional.

3. Pricing Tier Segmentation is Clear

Funnel chart shows diverse price bands for Gold and Silver items (e.g., ₹5k to ₹76k).

Total Silver pricing is correctly summed up as ₹132k, indicating correct aggregation logic.

4. UI Load Stability

All dashboard components load without errors or latency during testing.

Visuals are responsive and easy to interpret for both technical and non-technical users.

5. Equal Distribution Verification

Bar chart confirms equal distribution of Gold and Silver billings (5 each), helpful for verifying consistency during sales testing.

6. Test Pass Indicators

No missing data points, broken charts, or incorrect values observed during this testing phase.

Dashboard ready for stakeholder review or user acceptance testing (UAT).

objectives for the Jewelry Inventory System project using Salesforce CRM for Dashboard-1:

1. Improve Inventory and Billing Accuracy:

Streamline the tracking of jewelry items, their pricing, and associated billing records to ensure real-time visibility and eliminate manual errors in stock and transaction management.

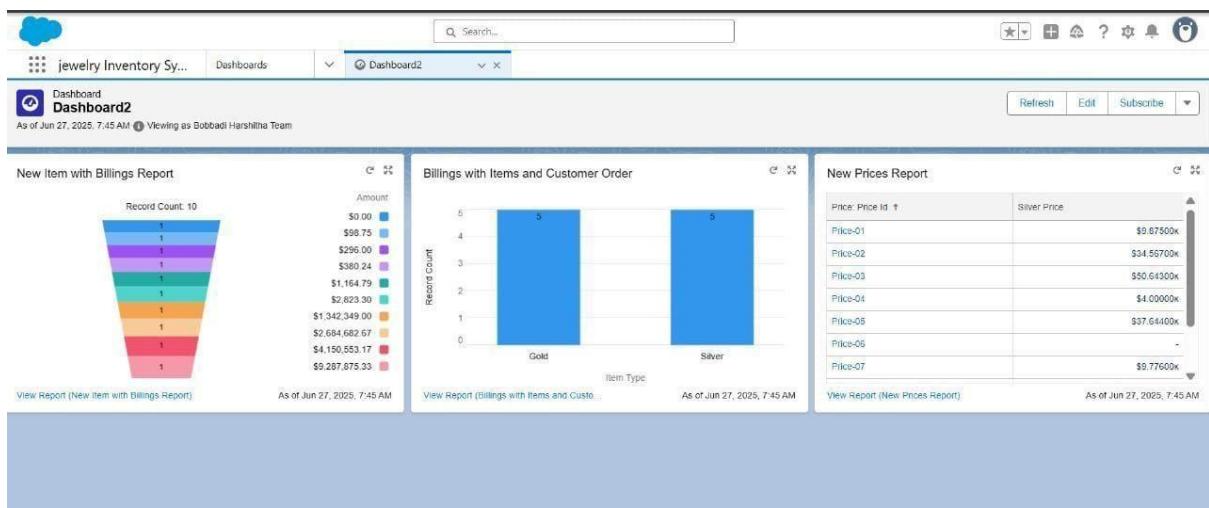
2. Enhance Customer Order Management:

Establish a seamless linkage between jewelry items and customer orders (Gold/Silver types), enabling faster processing, better customer service, and accurate historical records.

3. Enable Data-Driven Business Decisions:

Provide actionable insights through dynamic dashboards and reports that visualize billing trends, item-wise distribution, and pricing tiers—helping management make strategic inventory and pricing decisions.

Dashboard-2:



Performance Observations from Dashboard-2:

1. New Item with Billings Report:

10 items are billed, with amounts ranging from \$0.00 to a high of \$9,287,875.33. This wide range indicates possible inconsistencies or the presence of high-value custom items. One item is showing \$0.00, which may point to a data error or a complimentary item.

2. Billings by Item Type (Gold vs. Silver):

Both Gold and Silver have 5 records each, indicating a balanced dataset. Good performance in terms of item-type categorization and data uniformity.

3. New Prices Report:

Prices for items like Price-03 and Price-05 are significantly high, exceeding \$50k and \$37k respectively. A few items (e.g., Price-06) are missing price data, which needs attention during testing.

Objectives for Jewelry Inventory Management Dashboard -2(Phase Testing):

1. Track New Items with Billing Details:

Objective is to visualize how new jewelry items are associated with billing values. Enables monitoring of item value distribution, including extremely high and zero-value billings.

2. Analyze Customer Orders by Item Type:

Understand customer billing patterns for gold and silver items. Understand customer billing patterns for gold and silver items.

3. Monitor and Update Jewelry Prices:

View and compare the current silver prices for various jewelry products. Supports pricing strategy alignment with market rates.

8. RESULTS (OUTPUT SCREENSHOTS)

A. Automated Emails (using templates):

- Stock Alert for Low Inventory
- Purchase Order Confirmation
- Sales Invoice Notification
- Inventory Replenishment Notification
- Daily Sales Summary

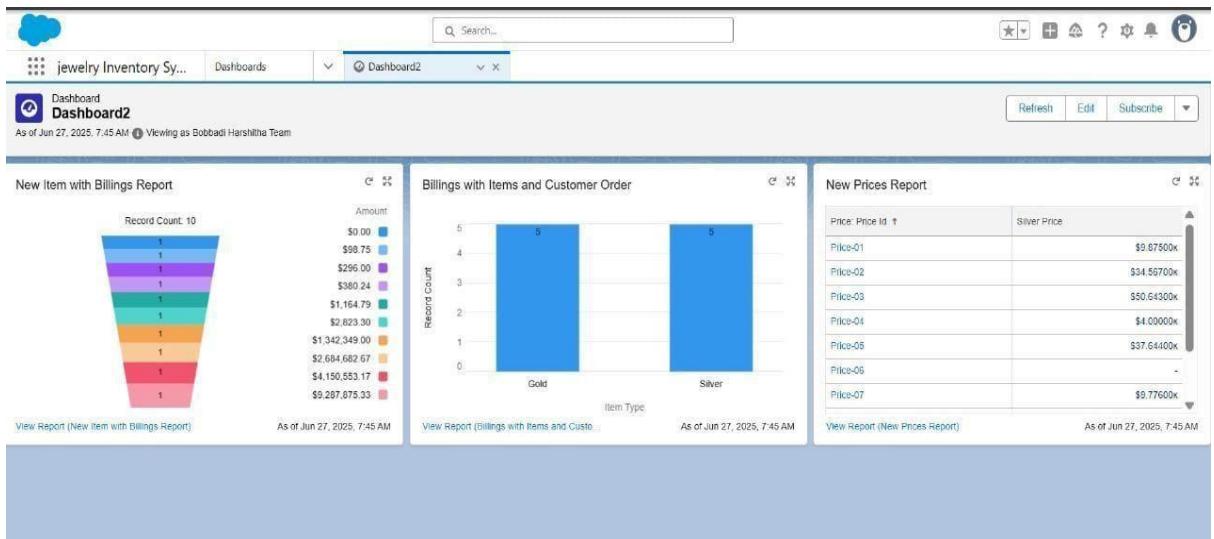
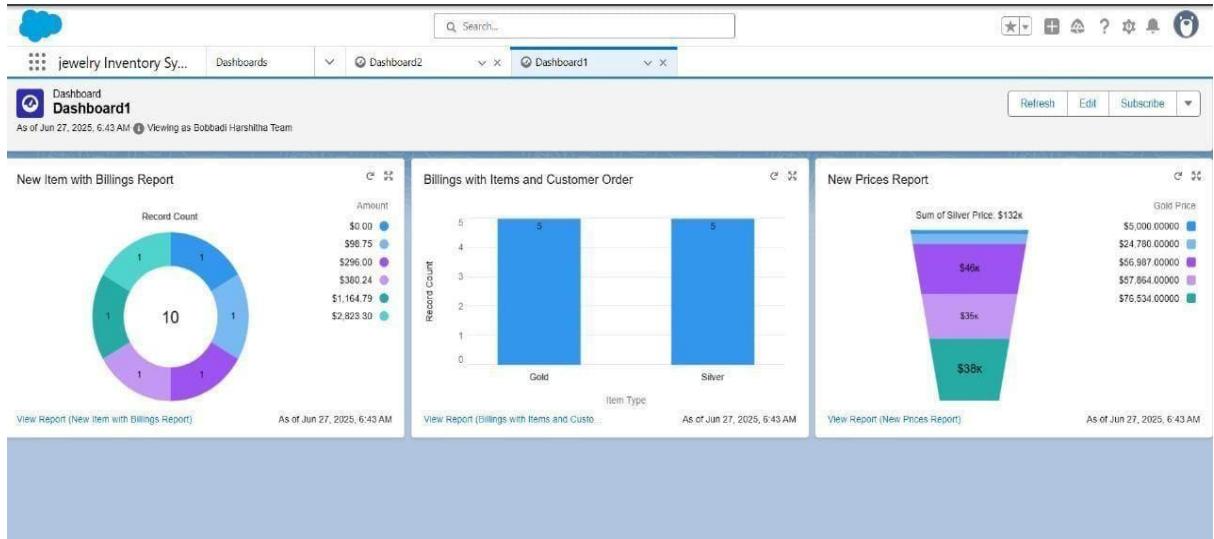
B. Automated Workflows:

- Trigger-based validations
 - Auto-validate if stock is available before creating an invoice
 - Alert for duplicate product entries

C. Approval Workflow Output:

- Product Addition Requests
 - New products require manager approval before appearing in inventory
- Stock Reorder Requests
 - Approval triggered when reorder level is reached
- Notifications
 - In-app and email notifications sent for each approval or rejection

Dashboards:



Reports:

New Prices Report

Total Records	Total Silver Price	
10	\$642,908.00000	
<input type="checkbox"/> Gold Price ↑	<input type="checkbox"/> Price: Price Id ↴	<input type="checkbox"/> Silver Price ↴
<input type="checkbox"/> (-1)	Price-08	-
Subtotal		\$0.000000
<input type="checkbox"/> \$6,000.00000 (1)	Price-04	\$4,000.00000
Subtotal		\$4,000.00000
<input type="checkbox"/> \$24,780.00000 (1)	Price-01	\$9,875.00000
Subtotal		\$9,875.00000
<input type="checkbox"/> \$68,987.00000 (1)	Price-09	\$45,670.00000
Subtotal		\$45,670.00000
<input type="checkbox"/> \$67,864.00000 (1)	Price-02	\$34,567.00000
Subtotal		\$34,567.00000
<input type="checkbox"/> \$78,554.00000 (1)	Price-06	\$37,644.00000
Subtotal		\$37,644.00000
<input type="checkbox"/> \$86,588.00000 (1)	Price-08	\$40,857.00000
Subtotal		\$40,857.00000
Grand Total		

Row Counts Detail Rows Subtotals Grand Total

New Item with Billings Report

Total Records		
10		
<input type="checkbox"/> Amount ↑	<input type="checkbox"/> Item Id ↴	<input type="checkbox"/> Billing Id ↴
<input type="checkbox"/> \$0.00 (1)	Item-08	Billing-06
Subtotal		
<input type="checkbox"/> \$98.75 (1)	Item-02	Billing-03
Subtotal		
<input type="checkbox"/> \$298.00 (1)	Item-09	Billing-04
Subtotal		
<input type="checkbox"/> \$380.24 (1)	Item-04	Billing-07
Subtotal		
<input type="checkbox"/> \$1,164.79 (1)	Item-06	Billing-09
Subtotal		
<input type="checkbox"/> \$2,623.30 (1)	Item-10	Billing-02
Subtotal		
<input type="checkbox"/> \$1,342,349.00 (1)	Item-01	Billing-01
Subtotal		
Grand Total		

Row Counts Detail Rows Subtotals Grand Total

Billings with Items and Customer Order Report

Total Records		
10		
<input type="checkbox"/> Item Type ↑	<input type="checkbox"/> Item Id ↴	<input type="checkbox"/> Billing Id ↴
<input type="checkbox"/> Gold (5)	Item-01	Billing-01
	Item-03	Billing-05
	Item-08	Billing-06
	Item-05	Billing-08
	Item-07	Billing-10
Subtotal		
<input type="checkbox"/> Silver (5)	Item-10	Billing-02
	Item-02	Billing-03
	Item-09	Billing-04
	Item-04	Billing-07
	Item-06	Billing-09
Subtotal		
Total (10)		

Flows:

The screenshot shows the Salesforce Flow Details page for a flow named "Project Flow".

Flow Details:

- Type: Record—Run After Save
- Associated Record: (None)
- Progress Status: Activated
- Last Modified Date: 6/25/2025, 12:05 PM
- Flow Owner: Bobbadi_Harsitha_Team

Related & Details:

Information:

Field	Value
Flow Label	Project Flow
Description	(None)
Associated Record	(None)
Created By	Bobbadi_Harsitha_Team, 6/25/2025, 12:04 PM
Last Modified	Bobbadi_Harsitha_Team, 6/25/2025, 12:05 PM
Category	(None)
API Name	Project_Flow
Flow Type	Record-Triggered After Save Flow
Segment	(None)
Created Date	6/25/2025, 12:04 PM
Last Modified Date	6/25/2025, 12:05 PM
Subcategory	(None)

The screenshot shows the Salesforce Flow Builder interface for a flow named "Project Flow - V1".

Toolbox:

- Interaction (3): Action, Subflow, Custom Error
- Logic (6): Assignment, Decision, Loop, Transform, Collection Sort, Collection Filter
- Data (4): Create Records, Update Records

Flow Structure:

```
graph TD; Start((Start)) --> Action1[Action notice];
```

Start: Record-triggered Flow
Object: Billing
Trigger: A record is created or updated
Optimize for: Actions and Related Records

Action: notice

Triggers:

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup categories: 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, and List View Button Layout. The main content area is titled "Triggers" and shows a single item: "UpdatePaidAmountTrigger". The table columns are labeled "LABEL", "API VERSION", "SIZE WITHOUT COMMENTS", and "MODIFIED BY". The trigger details are: API Version 64.0, Size 310, Modified by Bobbadi Harshitha Team on 6/24/2025, 10:48 AM.

The screenshot shows the Apex Trigger Detail page for "UpdatePaidAmountTrigger". The left sidebar has the same categories as the previous screenshot. The main content area shows the trigger details: Name "UpdatePaidAmountTrigger", Code Coverage 0% (0/4), Created By Bobbadi Harshitha Team on 6/24/2025, 10:47 AM, and Last Modified By Bobbadi Harshitha Team on 6/24/2025, 10:48 AM. The trigger code is displayed in the "Apex Trigger" tab:

```
1 trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {
2     if (Trigger.isInsert) {
3         4     UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);
5     } else if (Trigger.isUpdate) {
6         7             8         UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap, Trigger.new);
9     }
10 }
11
12
13 }
```

9. ADVANTAGES AND DISADVANTAGES:

ADVANTAGES:

Automation Efficiency:

All critical operations like billing, inventory updates, and notifications are automated via flows, reducing manual errors.

Centralized Data Handling:

Data is stored and managed in a centralized CRM system, making it easily accessible and modifiable.

Real-Time Analytics:

Dashboards and reports provide live updates on business performance, which helps in faster decision-making.

User-Friendly UI:

Salesforce Lightning provides a smooth and modern interface for all users.

Scalability:

The app can be expanded to handle more data and integrate with other business apps like payment gateways.

Customer Satisfaction:

By streamlining the sales and service process, the application enhances the overall customer experience.

DISADVANTAGES

Learning Curve:

New users may need training to understand Salesforce's interface, objects, and flows.

Customization Dependency:

Some specific logic might require Apex development or third-party tools.

Cost Factor:

Scaling to a full enterprise-level Salesforce environment could be costly for small businesses.

Admin Management:

Role and permission setup must be carefully handled to ensure data security.

10. CONCLUSION

"In conclusion, the CRM Application for Jewel Management serves as a robust, cloud-based solution built using Salesforce. It brings digital transformation to traditional jewelry retailing by:

- Streamlining operations with custom objects and flows
- Improving business oversight with real-time dashboards
- Automating repetitive tasks like billing and inventory updates
- Enhancing data integrity and customer service

The project demonstrates how low-code tools like Salesforce Flow and Lightning App Builder can be used by developers to create enterprise-grade solutions. Our application is not only scalable and efficient but also provides a solid foundation for future business growth in the jewelry sector."

11. FUTURE SCOPE

"The current CRM application for Jewel Management lays a strong foundation for digital jewellery retail operations. However, the system can be further improved and extended in the following ways:

Payment Gateway Integration:

Integrate with online payment services such as Razorpay, PayPal, or Stripe to allow direct billing and payment within the CRM.

SMS and WhatsApp Alerts:

Enhance communication by integrating Twilio or other SMS APIs to send updates like order confirmations, billing alerts, or promotions.

Mobile App Development:

Extend the system using Salesforce Mobile SDK to create a dedicated mobile app for store owners and executives to manage inventory and billing on-the-go.

Barcode Scanner Support:

Enable barcode scanning through the mobile app or connected devices for faster item search and billing.

AI-Based Recommendations:

Use Salesforce Einstein to provide personalized recommendations to customers based on previous purchase history.

Third-Party Integrations: Connect with accounting software like QuickBooks or Tally for autosyncing of billing and financial data.

Multi-Store Management:

Add support for multiple branches or stores to manage inventory separately but view consolidated dashboards.

Customer Feedback System:

Implement a feedback module to collect and analyse customer reviews, which can be visualized in reports.