

CRM Application for Jewel Management

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College Code: brubw

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1.INTRODUCTION

1.1 Project Overview

A **Jewellery Management System** is software designed to simplify and digitalize Jewellery business operations. It helps manage inventory, sales, billing, customer records, suppliers, and reports with accuracy and efficiency.



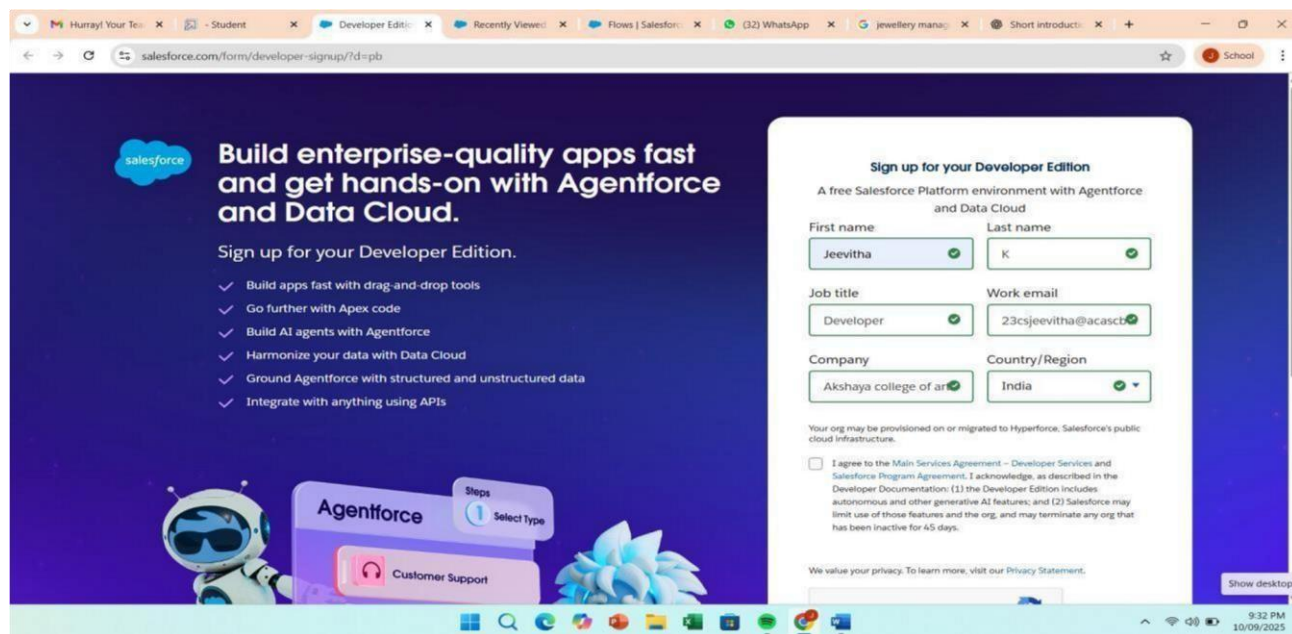
1.2 Purpose

The purpose of a Jewellery Management System is to **automate and streamline jewellery business operations** such as inventory tracking, billing, sales management, and customer records. It aims to **reduce manual errors, save time, ensure data accuracy, and improve overall efficiency** in managing jewellery shops or businesses..

DEVELOPMENT PHASE

Creating Developer Account:

1. By using this URL - <https://developer.salesforce.com/signup>



The screenshot shows the Salesforce Developer Edition signup page. The page has a dark blue header with the Salesforce logo and the text "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists several benefits: "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", and "Integrate with anything using APIs". On the right side, there is a form titled "Sign up for your Developer Edition" with the subtitle "A free Salesforce Platform environment with Agentforce and Data Cloud". The form contains fields for "First name" (Jeevitha), "Last name" (K), "Job title" (Developer), "Work email" (23csjeevitha@acascb), "Company" (Akshaya college of ar), and "Country/Region" (India). There is a checkbox for "I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement" and a link to "Show desktop". The page also features a "Steps" section with "1. Select Type" and "Customer Support".

- Created objects: Jewel Customer, Item, Billing, Price

orgfarm-21efc7081e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gl000001zx7/Details/View

Setup Home Object Manager

SETUP > OBJECT MANAGER
Jewel Customer

Details Edit Delete

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

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

7:48 PM
10/09/2025

orgfarm-21efc7081e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gl000001m0zd/Details/View

Setup Home Object Manager

SETUP > OBJECT MANAGER
Item

Details Edit Delete

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

Fields & Relationships
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List View Button Layout
Restriction Rules
Scoping Rules

7:53 PM
10/09/2025

Welcome to SalesforceRecently ViewedBilling | SalesforceStudent(B2) WhatsAppjewellery managementShort Introduction

orgfarm-21efc7081e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gl.000001m1XV/Details/view

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Billing

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

Details

Description

API Name

Billing__c

Custom

✓

Singular Label

Billing

Plural Label

Billings

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

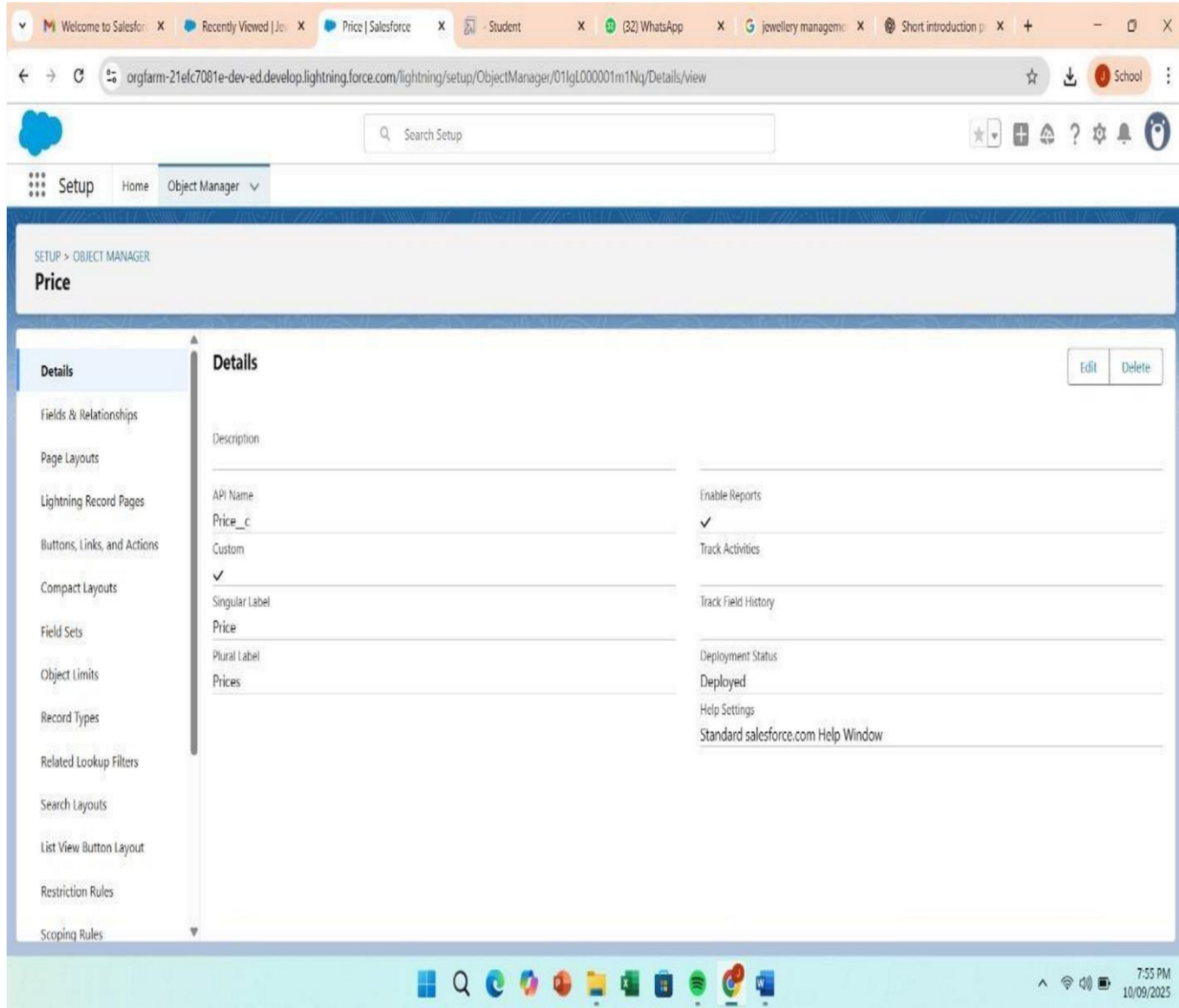
Help Settings

Standard salesforce.com Help Window

EditDelete

7:54 PM

10/09/2025



- Configured fields and relationships

Welcome to Salesforce | Recently Viewed | Jewel Customer | Student | (33) WhatsApp | jewellery managem... | Short introduction p... | School

orgfarm-21efc7081e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gl000001lx7/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Jewel Customer

Details
Fields & Relationships
22 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Lookup(Jewel Customer)		✓
City	City__c	Text(20)		
Country	Country__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Customer Name	Customer_Name__c	Lookup(Jewel Customer)		✓
Customer name	Name	Text(80)		✓
Email	Email__c	Email		
Gold Price	Gold_Price__c	Lookup(Jewel Customer)		✓
KDM	KDM__c	Lookup(Jewel Customer)		✓

7:57 PM 10/09/2025

Welcome to Salesforce | Recently Viewed | Item | Student | (33) WhatsApp | jewellery managem... | Short introduction p... | School

orgfarm-21efc7081e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gl000001m0zd/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Item

Details
Fields & Relationships
22 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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)		
Last Modified By	LastModifiedId	Lookup(User)		

7:58 PM 10/09/2025

orgfarm-21efc7081e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001m1XV/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Billing

Details

Fields & Relationships
14 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	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)		
Ornament	Ornament__c	Formula (Text)		

7:58 PM 10/09/2025

orgfarm-21efc7081e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001m1Nq/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Price

Details

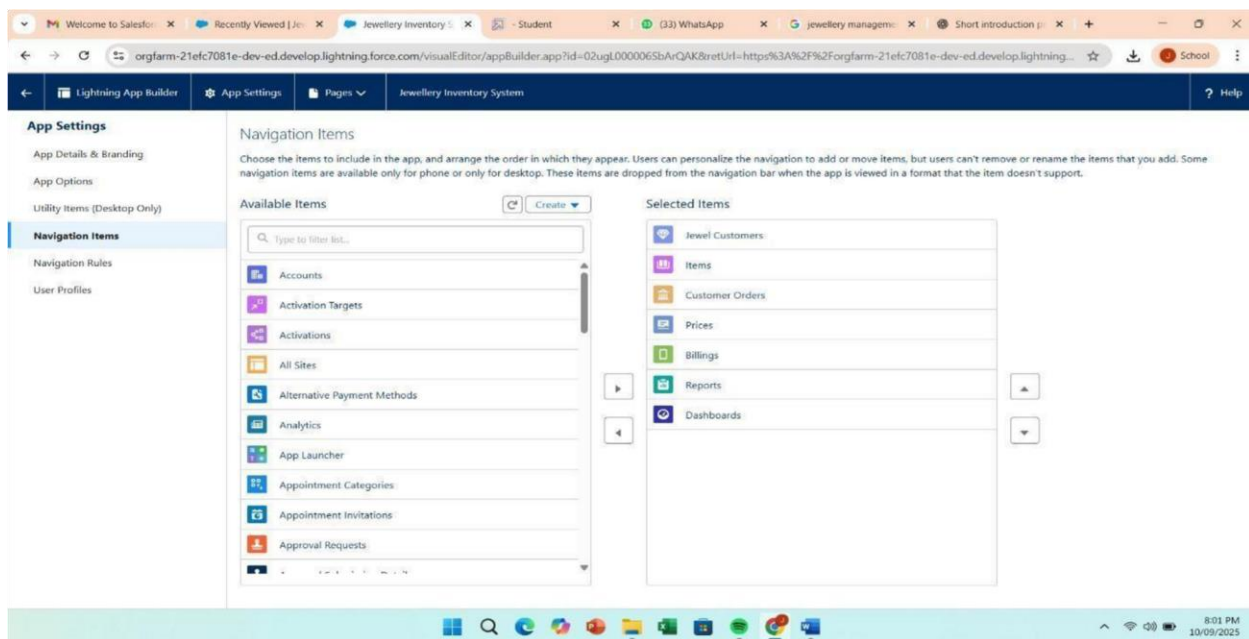
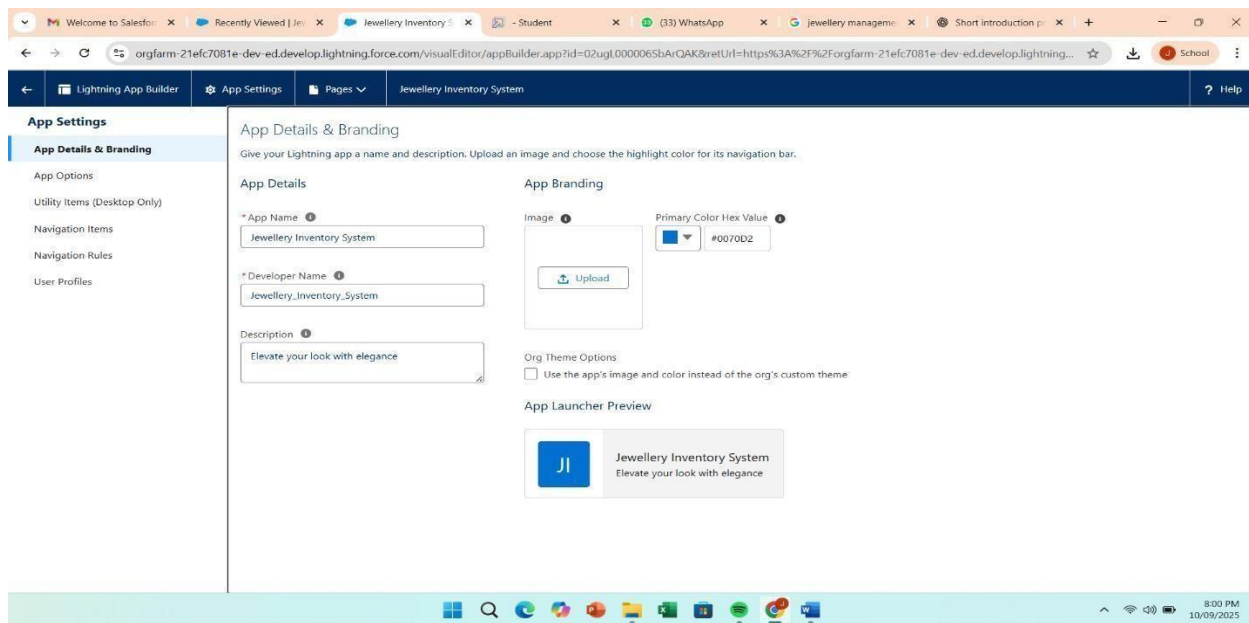
Fields & Relationships
6 Items, Sorted by Field Label

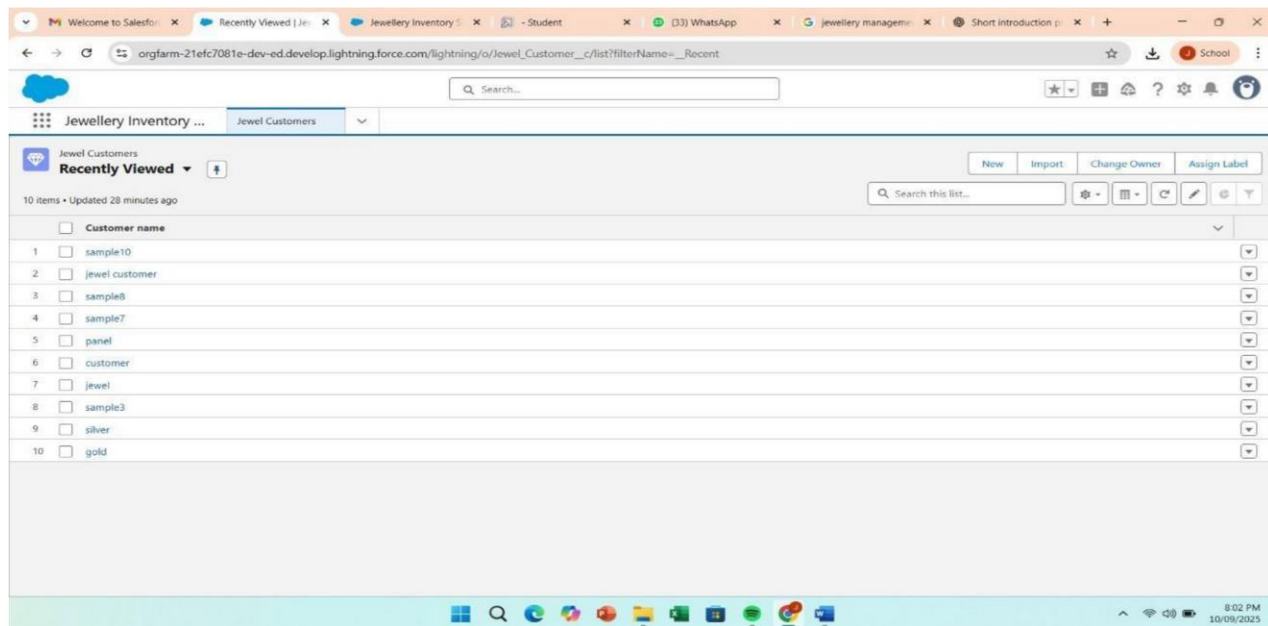
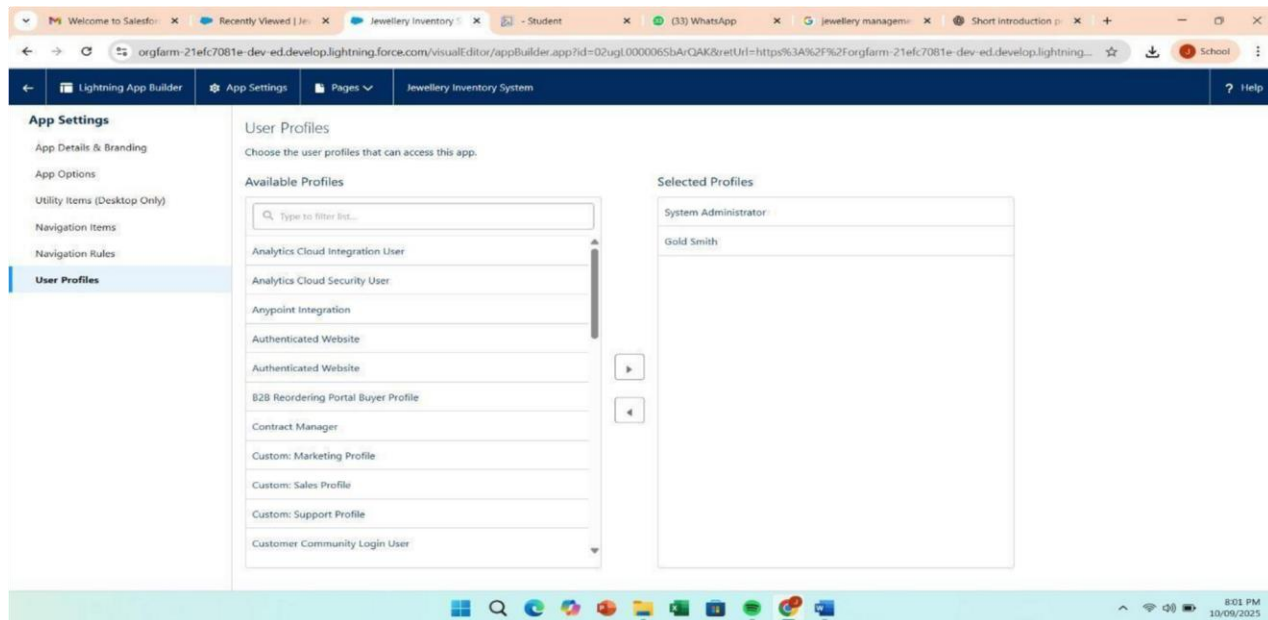
Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Gold Price	Gold_Price__c	Currency(8, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Price Id	Name	Auto Number		✓
Silver Price	Silver_Price__c	Currency(8, 5)		

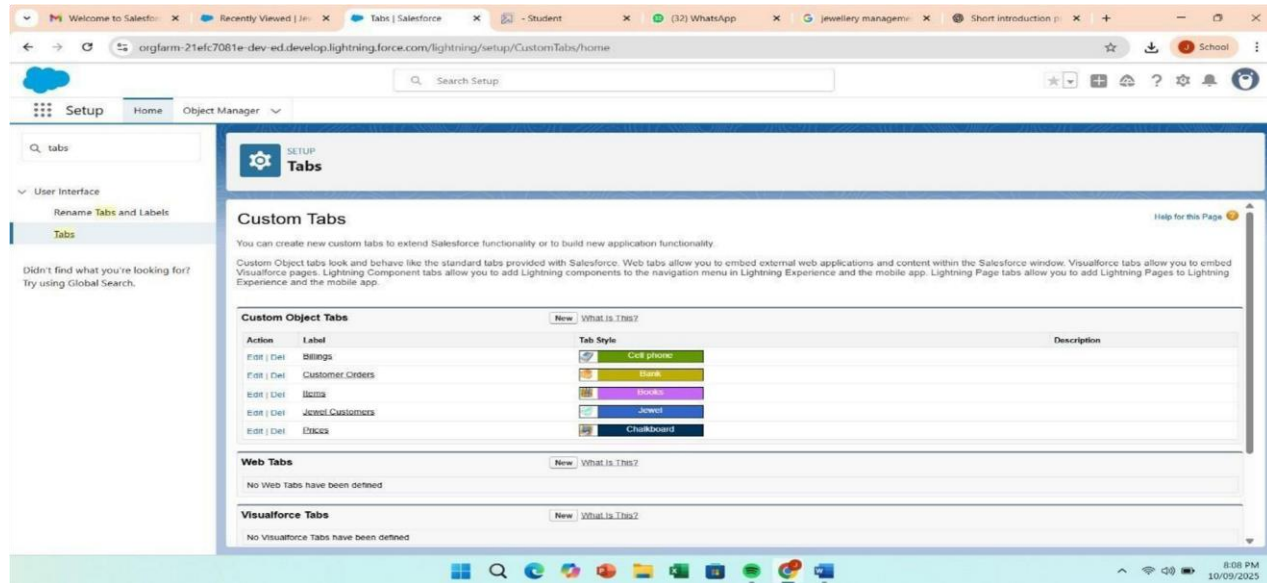
7:59 PM 10/09/2025

- Developed Lightning App with relevant tabs

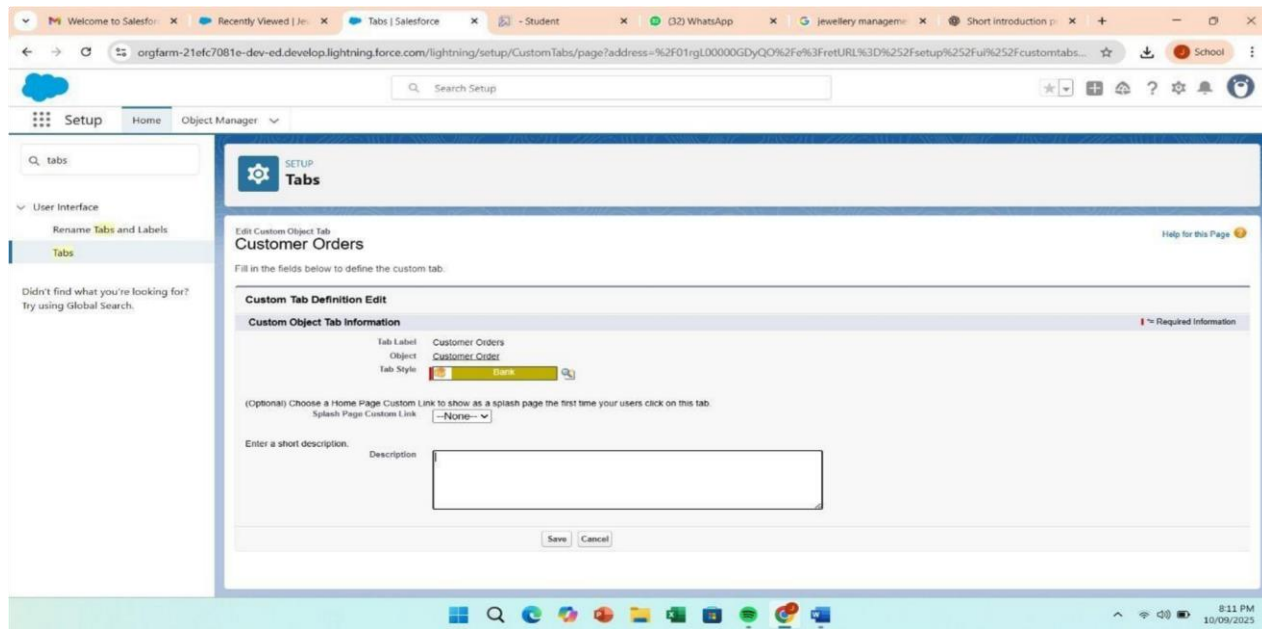


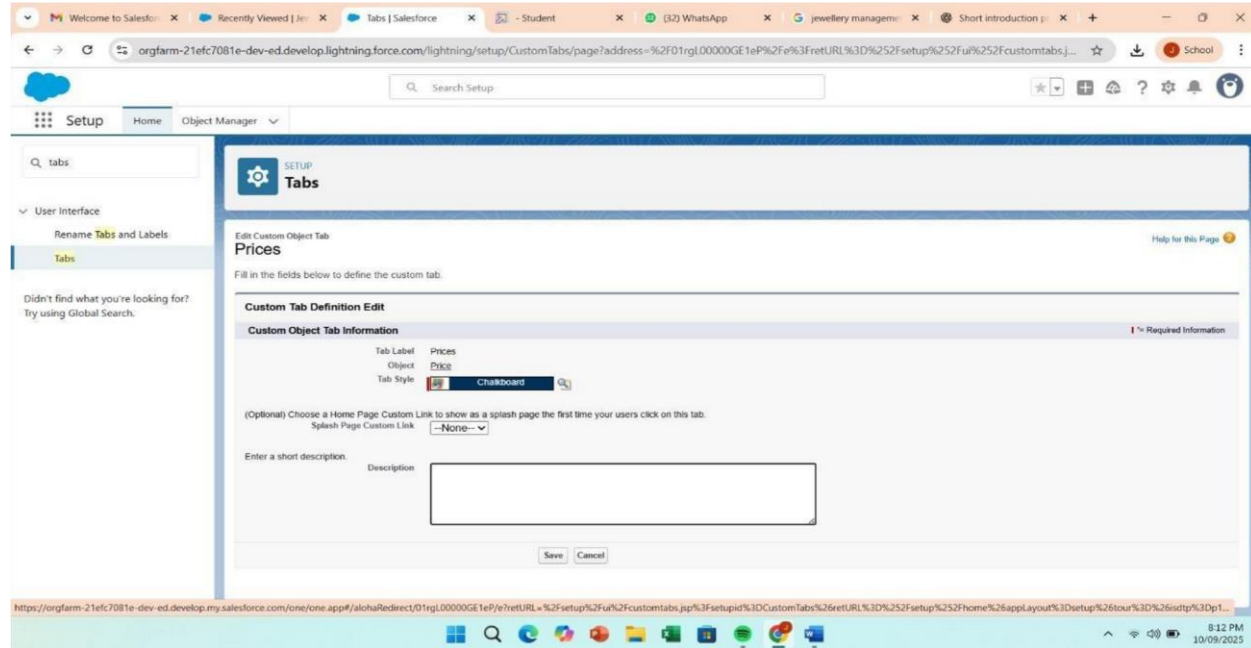


- Creating a Customer Tabs In The Fields

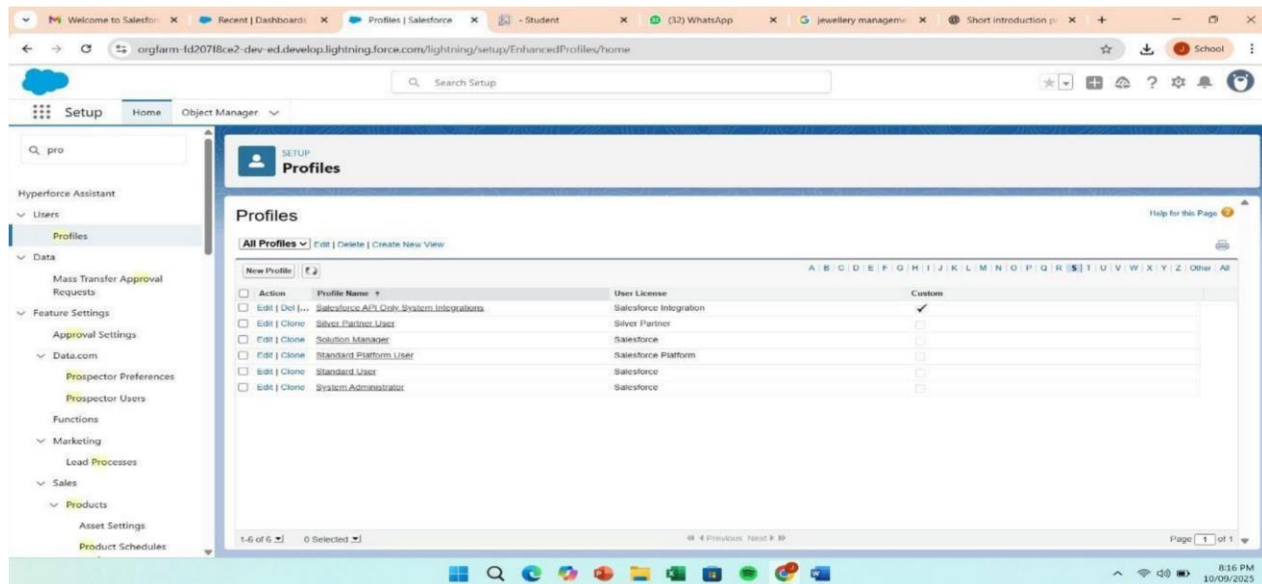


- To create a Customer Tabs

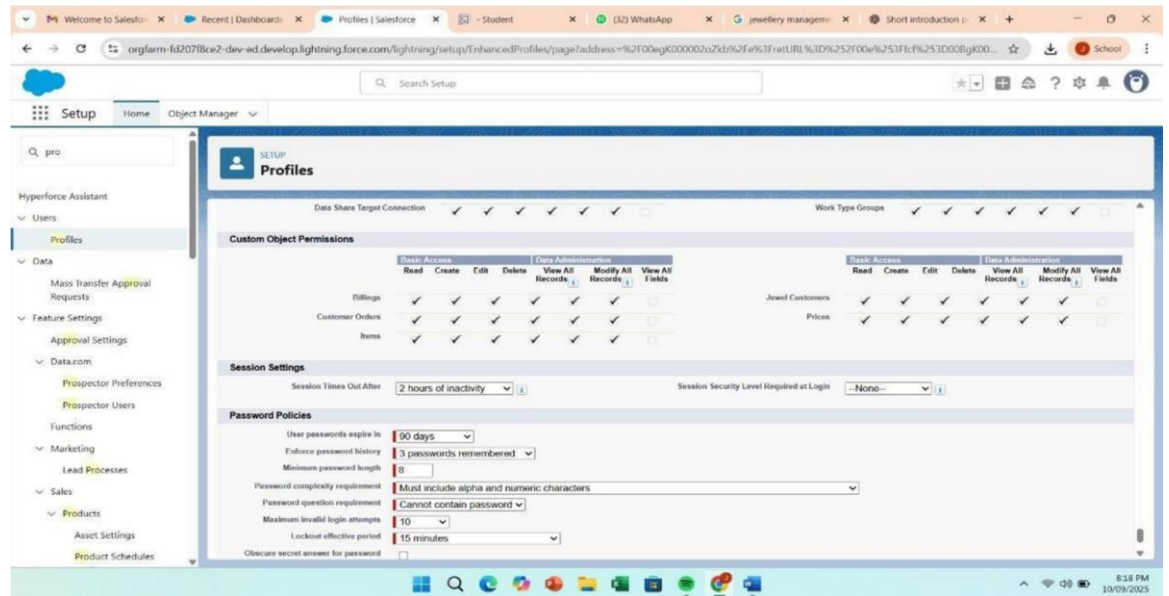




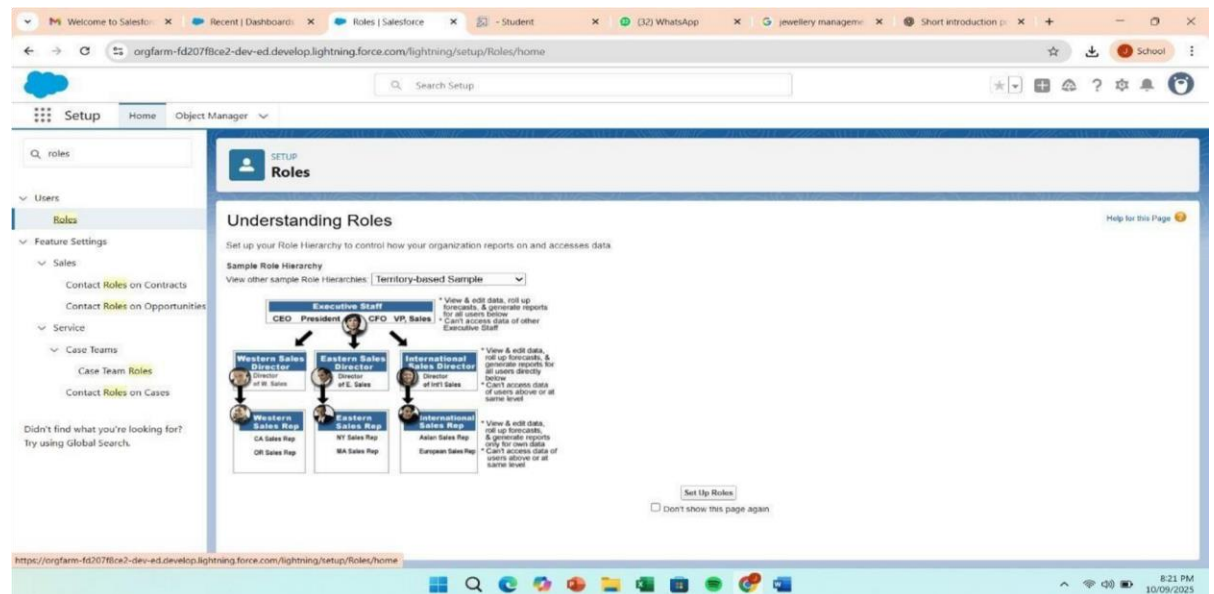
- Same Process In The Every Fields

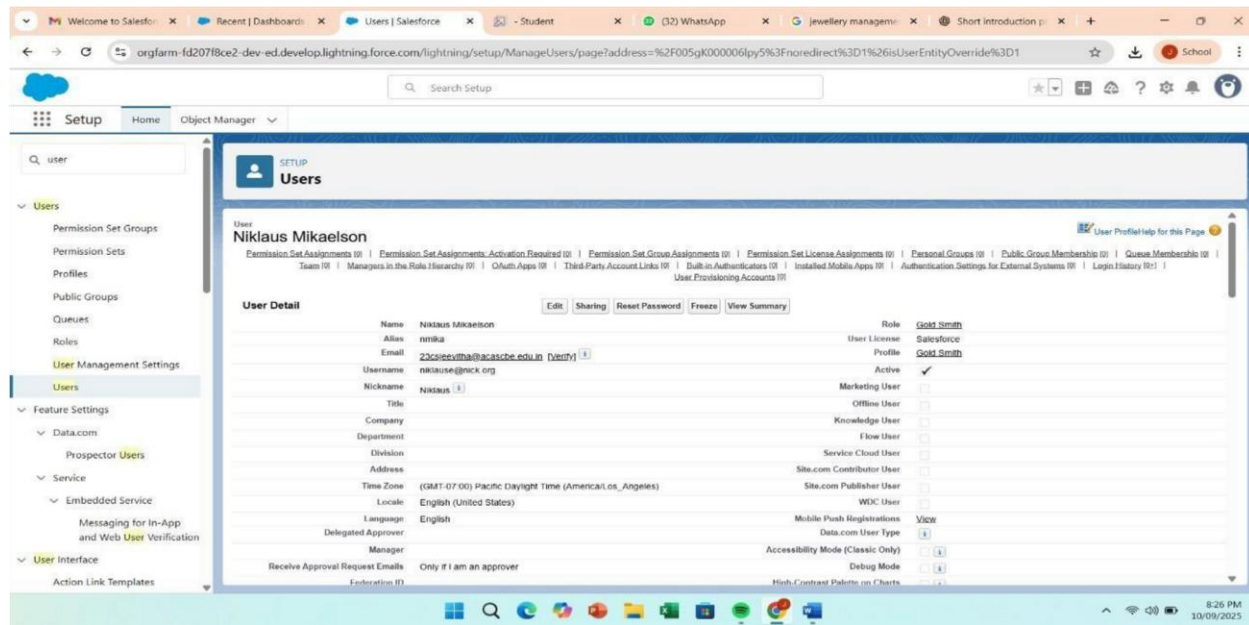


- Profiles Fields

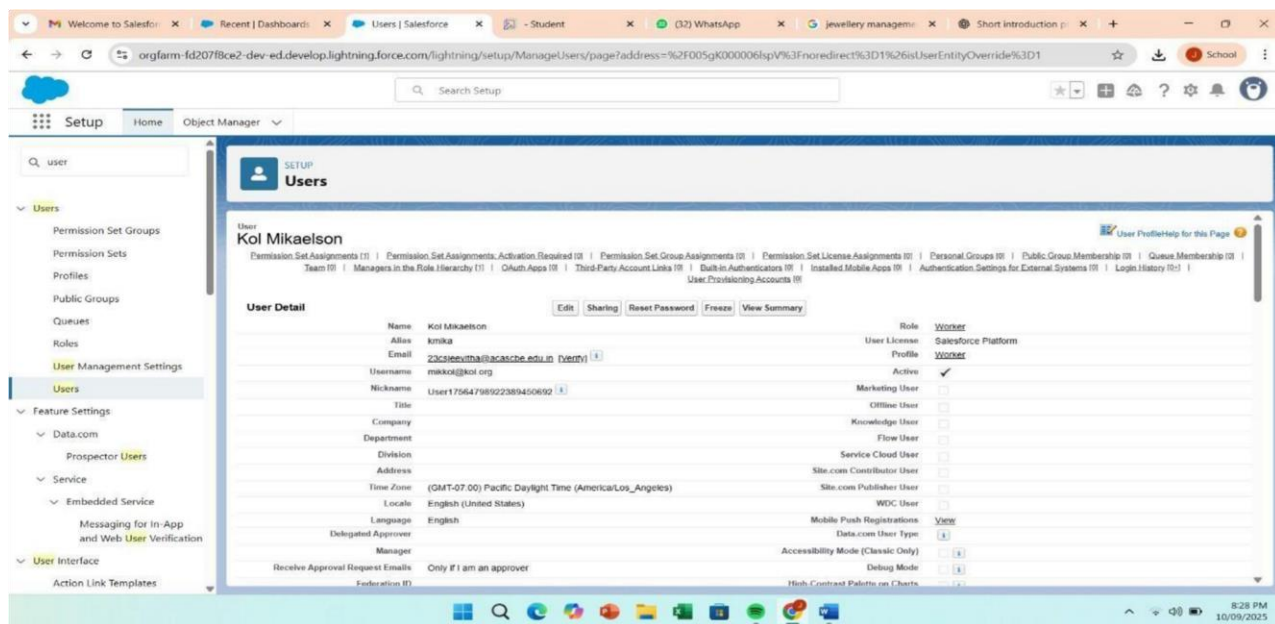


- Same Process In Worker Fields





For Check for User



- Create Page Layout For Gold And Silver

orgfarm-fd207f8ce2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gK000001dDhF/PageLayouts/view

Search Setup

Setup Home 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

List View Button Layout

Restriction Rules

Scoping Rules

Page Layouts

3 Items. Sorted by Page Layout Name

Quick Find

New

Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Item Layout	Jeevitha k, 8/28/2025, 6:06 AM	Jeevitha k, 9/6/2025, 12:01 AM
Page Layout for Gold	Jeevitha k, 8/29/2025, 8:17 AM	Jeevitha k, 9/6/2025, 12:01 AM
Page Layout for Silver	Jeevitha k, 8/29/2025, 8:26 AM	Jeevitha k, 9/6/2025, 12:01 AM

orgfarm-fd207f8ce2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gK000001dDhF/PageLayouts/00hgK000000GKQ1tQAG/view

Search Setup

Setup Home 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

List View Button Layout

Restriction Rules

Scoping Rules

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

Quick Find

Fields

Section

Created By

Item Id

Making Charges

Prices

Record Type

Total Weight

Blank Space

Customer Name

Item Type

Ornament

Priority

Weight

Expected Days Of

KDM

Owner

Purity

Silver Price

Stone/Other Price

Amount

Gold Price

Last Modified By

Percentage

Purity Gold Price

Stone Weight

Item Id

GEN 2004-001234

Customer Name

Sample Text

Owner

Sample Text

Prices

Sample Text

Priority

Sample Text

Item Type

Sample Text

Expected Days Of

Sample Text

Ornament

Sample Text

Silver Price

66.166

Weight

0.99882

Stone Weight

0.29032

Stone/Other Price

\$123.45

Total Weight

1.775

Percentage

85

Amount

60.379

KDM

\$123.45

Making Charges

\$123.45

Purity

51

Gold Price

\$123.45

Purity Gold Price

\$123.45

Weight

\$123.45

- Create Record Types.

Welcome to Salesfo...Recent | Dashboard | Item | Salesforce- Student(32) WhatsAppjewellery managem...Short introduction p...+ - School

orgfarm-fd207f8ce2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gK000001sDhF/RecordTypes/view

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGERItem

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction RulesScoping Rules

Record Types2 Items, Sorted by Record Type Label

Quick FindNewPage Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	Jeevitha k, 8/29/2025, 8:37 AM
Silver	Silver items information	✓	Jeevitha k, 8/29/2025, 8:40 AM

SETUP > OBJECT MANAGERItem

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction RulesScoping Rules

Record TypeGold

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.

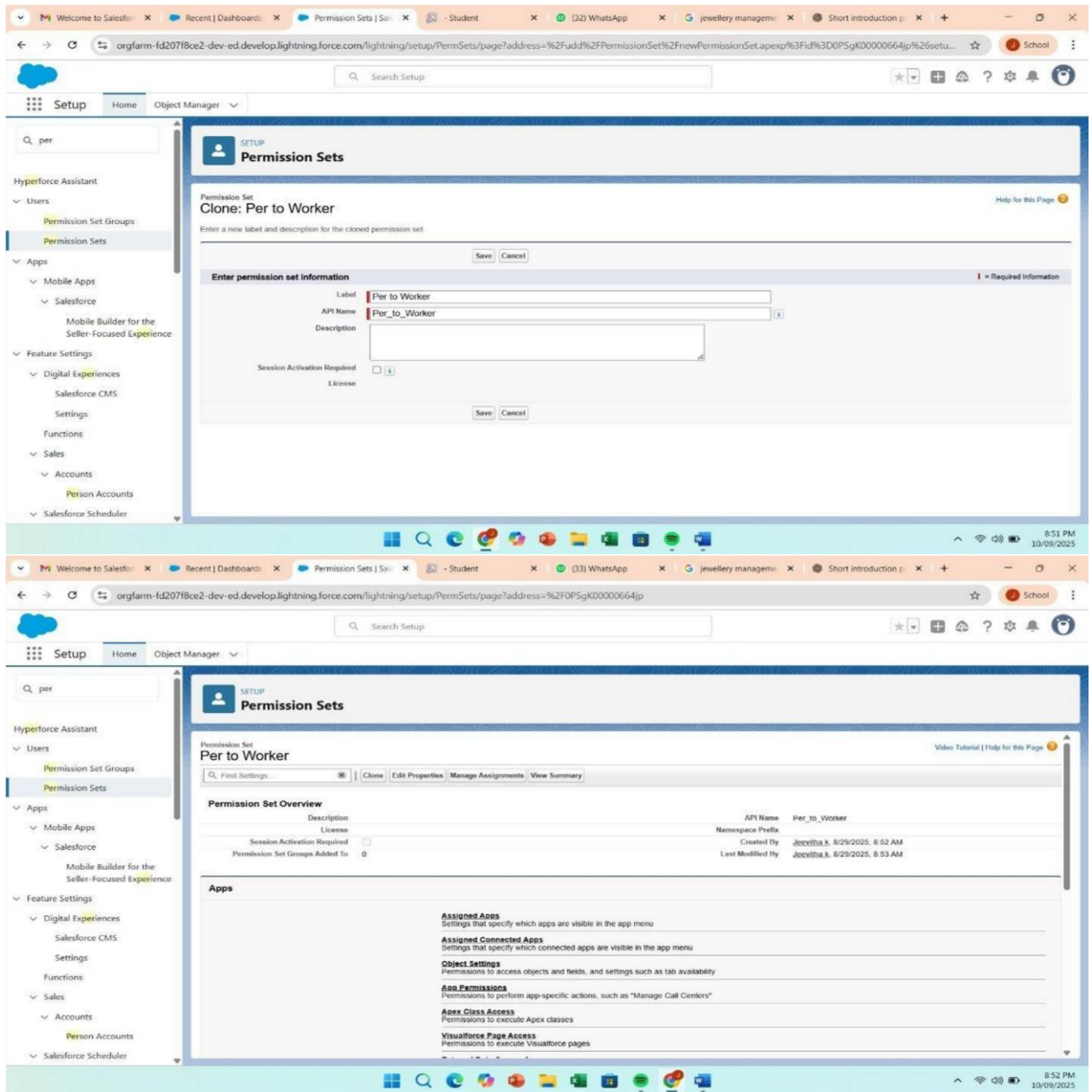
Edit

Record Type Label	Gold	Active	✓
Record Type Name	Gold		
Namespace Prefix			
Description	Gold items information		
Created By	Jeevitha k, 8/29/2025, 8:37 AM	Modified By	Jeevitha k, 8/29/2025, 8:37 AM

Picklists Available for Editing

Action	Field	Modified Date
Edit	Expected Days Of Return	8/29/2025, 8:37 AM
Edit	Item Type	8/29/2025, 8:37 AM
Edit	Priority	8/29/2025, 8:37 AM

- Record Types



- Permission Sets

Create an Per To worker

orgfarm-fd207f8ce2-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P5gK00000664jp

Setup Home Object Manager

Hyperforce Assistant

- Users
 - Permission Set Groups
 - Permission Sets
- Apps
 - Mobile Apps
 - Salesforce
 - Mobile Builder for the Seller-Focused Experience
- Feature Settings
 - Digital Experiences
 - Salesforce CMS
 - Settings
 - Functions
 - Sales
 - Accounts
 - Person Accounts
 - Salesforce Scheduler

Permission Set

Per to Worker

Find Settings... Clone Edit Properties Manage Assignments View Summary

Permission Set Overview

Description	License	API Name	Per_to_Worker
Session Activation Required	<input type="checkbox"/>	Namespace Prefix	
Permission Set Groups Added To	0	Created By	jccvillalba.k 8/29/2025, 8:52 AM
		Last Modified By	jccvillalba.k 8/29/2025, 8:53 AM

Apps

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

orgfarm-fd207f8ce2-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P5gK00000664jp%2F62Fe%3Fs%3DEntityPermissions%26o%3D01gK000001sDhF

Setup Home Object Manager

Hyperforce Assistant

- Users
 - Permission Set Groups
 - Permission Sets
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 - Mobile Apps
 - Salesforce
 - Mobile Builder for the Seller-Focused Experience
- Feature Settings
 - Digital Experiences
 - Salesforce CMS
 - Settings
 - Functions
 - Sales
 - Accounts
 - Person Accounts

Permission Set

Per to Worker

Find Settings... Clone Edit Properties Manage Assignments View Summary

Permission Set Overview Object Settings Items

Items

Save Cancel

Tab Settings

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

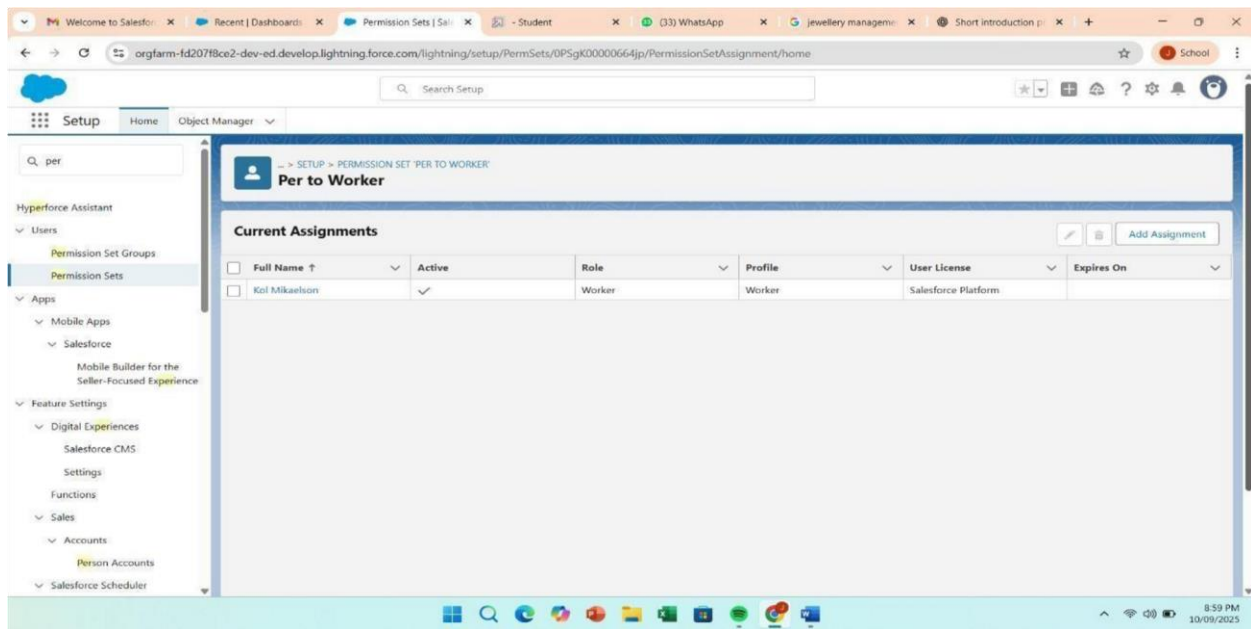
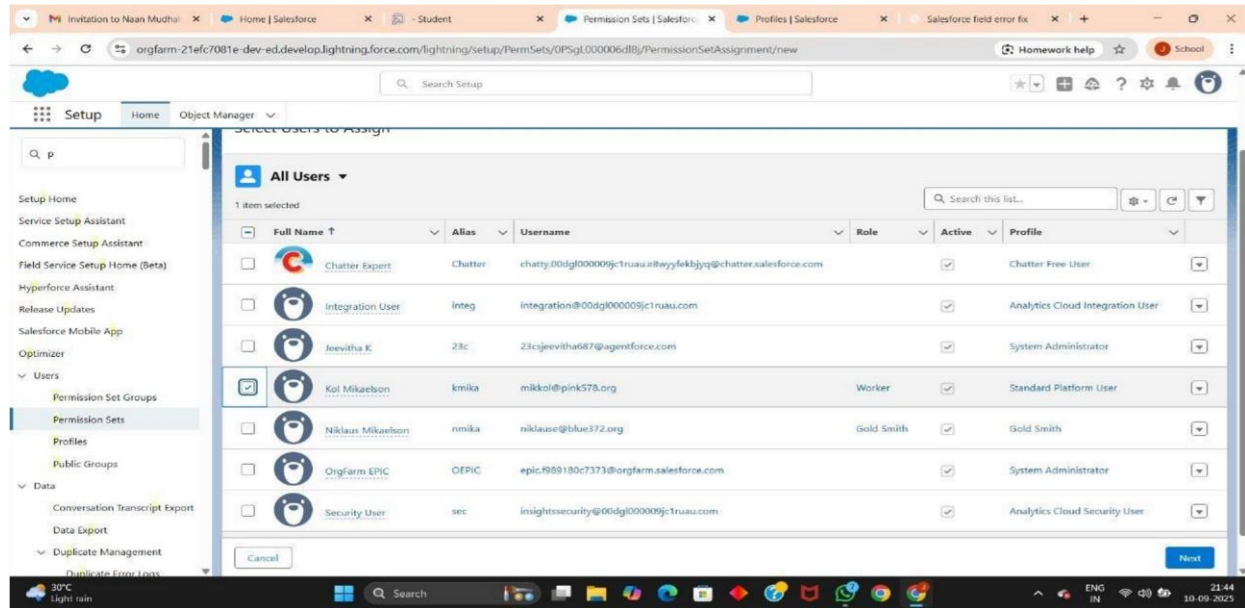
Item: Record Type Assignments

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"/>

https://orgfarm-fd207f8ce2-dev-ed.develop.my.salesforce.com/one/one.app?/alohaRedirect/0P5gK00000664jp/e?is=EntityPermissions&o=01gK000001sDhF&isdt=p1



- Create a Trigger Handler class

orgfarm-fd207fbce2-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSPage

UpdatePaidAmountTriggerHandler.apex

```
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
14
15    public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap, List<Billing__c> updatedBillings) {
16
17        for (Billing__c billing : updatedBillings) {
18
19            billing.Paid_Amount__c = billing.Paying_Amount__c;
20        }
21    }
22}
```

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size
------	-------------	-----------	------	--------	------	------

Filter Click here to filter the log list.

9:01 PM 10/09/2025

orgfarm-fd207fbce2-dev-ed.develop.lightning.force.com/lightning/o/Jewel_Customer__c/list?filterName=__Recent

Jewellery Inventory ... Jewel Customers

Jewel Customers Recently Viewed 10 items • Updated a few seconds ago

Search this list...

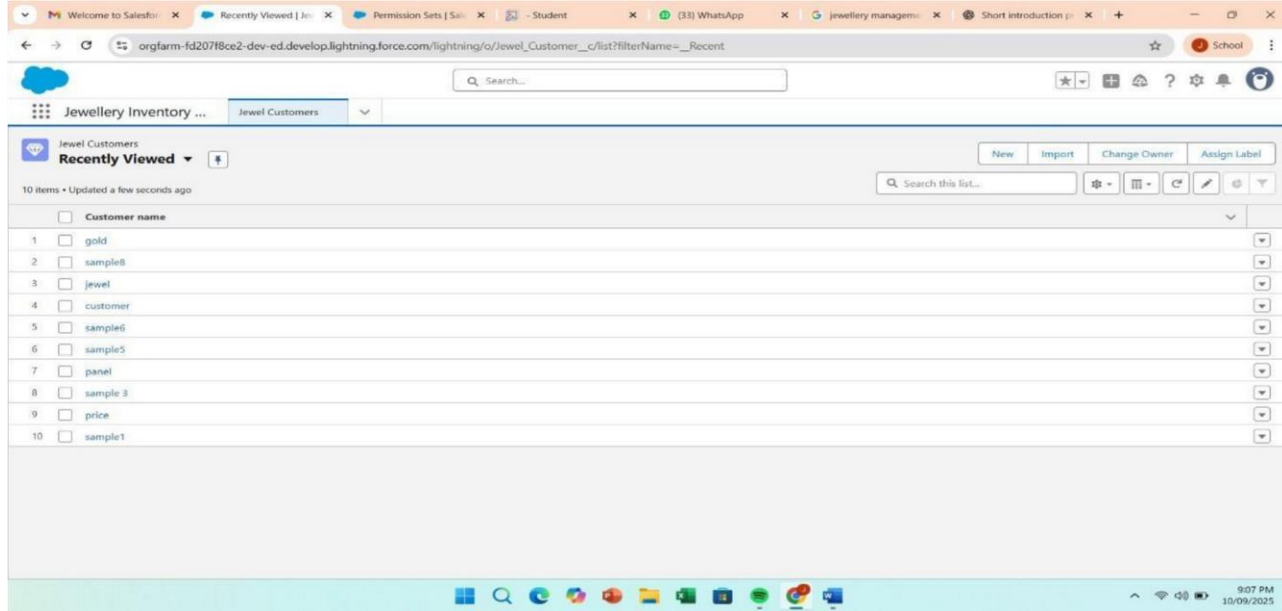
	Customer name	
1	<input type="checkbox"/> gold	
2	<input type="checkbox"/> sample8	
3	<input type="checkbox"/> jewel	
4	<input type="checkbox"/> customer	
5	<input type="checkbox"/> sample6	
6	<input type="checkbox"/> sample5	
7	<input type="checkbox"/> panel	
8	<input type="checkbox"/> sample 3	
9	<input type="checkbox"/> price	
10	<input type="checkbox"/> sample1	

9:03 PM 10/09/2025

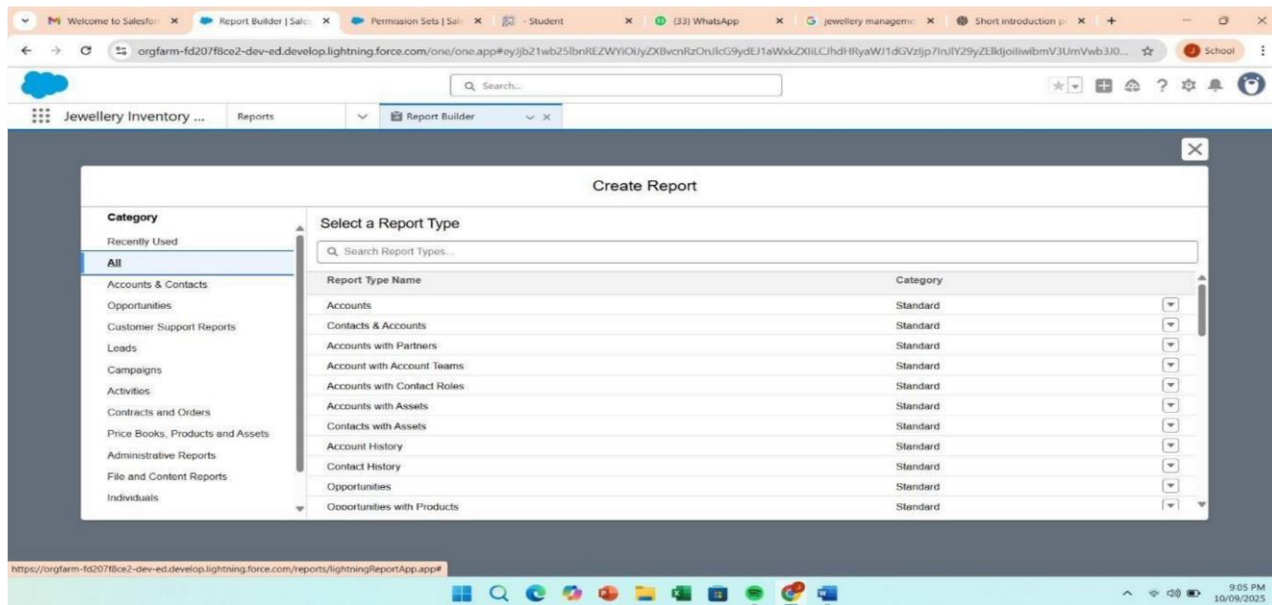
FUNCTIONAL AND PERFORMANCE TESTING

Performance Testing

- Jewellery Management System Testing



- Report checking



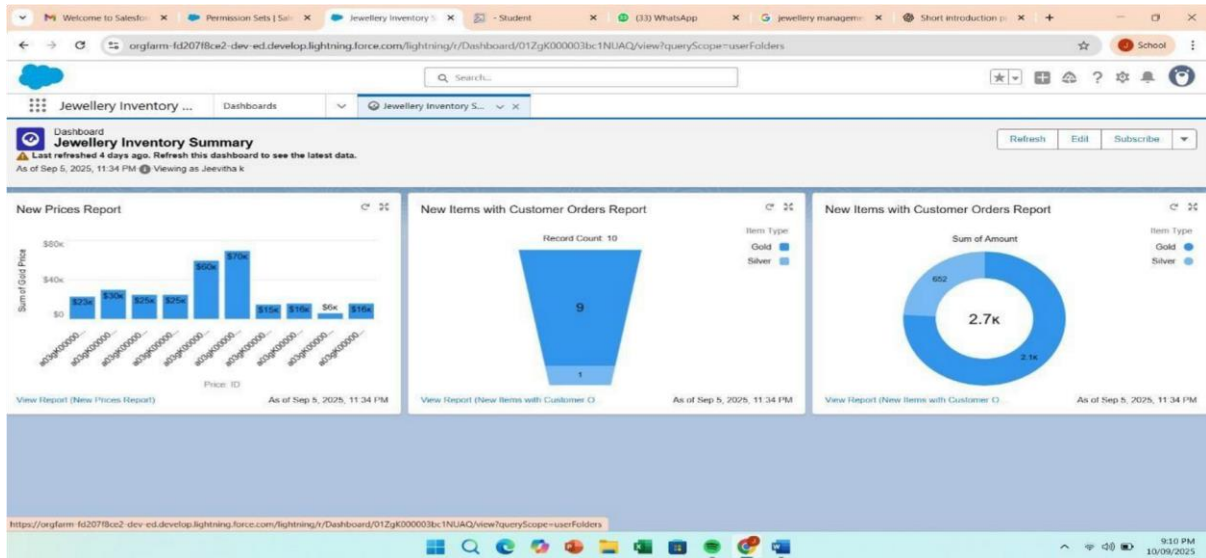
The screenshot shows the Salesforce Reports interface. The left sidebar contains a navigation menu with categories: REPORTS (Recent, Created by Me, Private Reports, Public Reports, All Reports), FOLDERS (All Folders, Created by Me, Shared with Me), and FAVORITES (All Favorites). The main content area displays a table of recent reports.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Items with Customer Orders Report		Public Reports	Jeevitha k	9/5/2025, 11:24 PM	
Created by Me	New Items with Customer Orders Report		Public Reports	Jeevitha k	9/5/2025, 11:32 PM	
Private Reports	New Prices Report		Public Reports	Jeevitha k	9/5/2025, 11:31 PM	

- Dashboard Checking.

The screenshot shows the Salesforce Dashboards interface. The left sidebar contains a navigation menu with categories: DASHBOARDS (Recent, Created by Me, Private Dashboards, All Dashboards), FOLDERS (All Folders, Created by Me, Shared with Me), and FAVORITES (All Favorites). The main content area displays a table of recent dashboards.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Jewellery Inventory Summary		Private Dashboards	Jeevitha k	9/5/2025, 11:25 PM	



Setup

Home Object Manager

Search Setup

Flows

Flow Definitions

All Flows

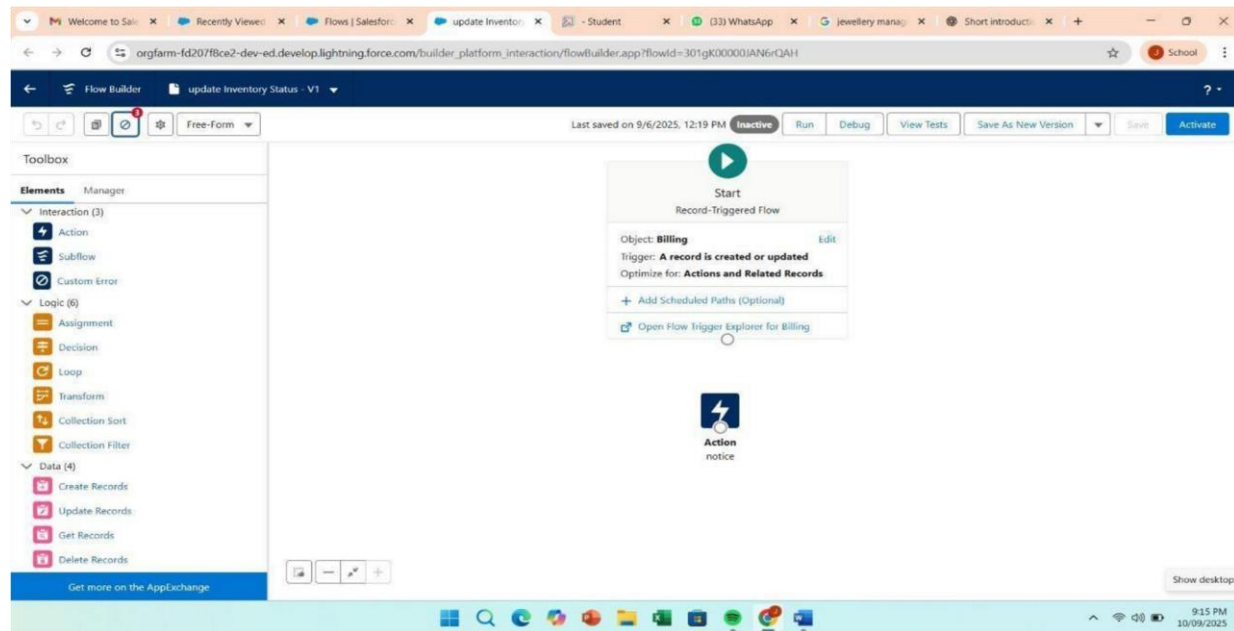
62 items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago

Flow Label ↑	Process Type	Active	Temp...	Package State	Packa...	Last Mo...	Last Modified Date
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Approvals Workflow: Evaluate Approval Requests	Screen Flow	✓	✓	Managed-Installed			
Approvals Workflow: Process Approval Submission	Screen Flow	✓	✓	Managed-Installed			
Authentication Provider User Registration	Identity User Registration Flow	✓	✓	Managed-Installed			
Basic Approval Request	Flow Orchestration for CMS	✓	✓	Managed-Installed			
Book Appointment from Invitation	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Cancel Item Flow	Screen Flow	✓	✓	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	✓	✓	Managed-Installed			
Chats Routed to Agents and Queues	Omni-Channel Flow	✓	✓	Managed-Installed			
Chats Routed to Agents with the Right Skills	Omni-Channel Flow	✓	✓	Managed-Installed			
Check Flow API Name	Autolaunched Flow	✓	✓	Managed-Installed			
Check Service Plan Eligibility	Autolaunched Flow	✓	✓	Managed-Installed			

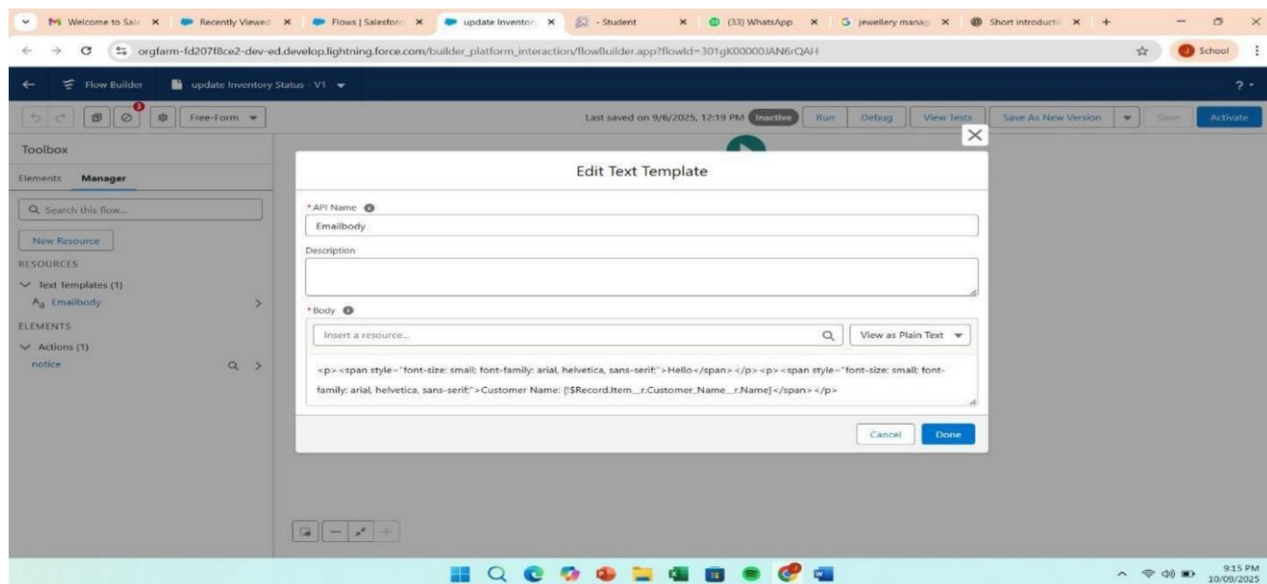
RESULTS

Output Screenshots

- Flows



- Action alerts



CONCLUSION

The Jewellery Management System provides an efficient way to manage jewellery business operations by automating tasks like inventory, billing, sales, and customer records. It reduces manual effort, minimizes errors, and ensures accuracy in data management..