

OXFORD ENGINEERING COLLEGE

**Department of B.TECH(INFORMATION
TECHNOLOGY)**

PROJECT TITLE:

**CRM APPLICATION FOR JEWEL
MANAGEMENT**

SUBMITTED BY :

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platform:salesforce Developer
Date of submission :05/11/2025

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.

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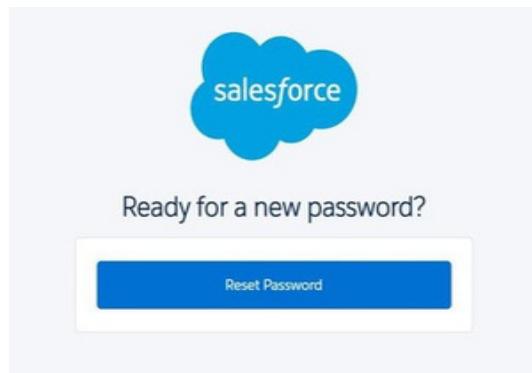
Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

I agree to the Main Service 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.

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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

▼

* 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. The main title is 'Jewel Customer'. 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 'Details' tab is selected. The main pane displays the 'Details' section for the 'Jewel Customer' object. It includes fields for Description, API Name (Jewel_Customer__c), Singular Label (Jewel Customer), Plural Label (Jewel Customers), Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and a link to the Standard salesforce.com Help Window.

2. Item

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The main title is 'Item'. 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 'Details' tab is selected. The main pane displays the 'Details' section for the 'Item' object. It includes fields for Description, API Name (Item__c), Singular Label (Item), Plural Label (Items), Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and a link to the Standard salesforce.com Help Window.

3. Customer Order

The screenshot shows the Salesforce Setup interface with the following details:

Customer Order

Details

Description: Customer Order

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: Edit, Delete

Left sidebar: 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.

4. Price

The screenshot shows the Salesforce Setup interface with the following details:

Price

Details

Description: Price

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, Delete

Left sidebar: 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.

5. Billing

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. Under the 'Billing' object, the 'Details' tab is active. The left 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 pane displays the 'Details' section for the Billing object, including fields for Description, API Name (Billing__c), Singular Label (Billing), Plural Label (Billings), Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window.

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 with the 'Tabs' page selected under 'User Interface'. A search bar at the top left shows 'tabs'. The main content area displays a 'Custom Object Tab' named 'Jewel Customers'. Below the tab name is a note: 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' table shows the following information: Tab Label (Jewel Customers), Object (Jewel Customer), Description (Created By bobadil hashimha Team 6/22/2025, 8:15 AM), Created By (bobadil hashimha Team), Modified By (bobadil hashimha Team), and Tab Style (Aeropane). A 'Splash Page Custom Link' field is also present.

2. Item

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'User Interface' > 'Tabs', there is a section for 'Rename Tabs and Labels'. A new tab has been created for the 'Bom' object. The 'Custom Tab Definition Detail' table shows the following information:

Tab Label	Bom
Object	Bom
Description	
Created By	Doddad Harshita Team
Modified By	Doddad Harshita Team

The 'Tab Style' is set to 'Alarm clock'.

3. Customer Order

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'User Interface' > 'Tabs', there is a section for 'Rename Tabs and Labels'. A new tab has been created for the 'Customer Order' object. The 'Custom Tab Definition Detail' table shows the following information:

Tab Label	Customer Orders
Object	Customer Order
Description	
Created By	Doddad Harshita Team
Modified By	Doddad Harshita Team

The 'Tab Style' is set to 'Deli'.

4. Price

The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. On the left sidebar, under 'User Interface', 'Rename Tabs and Labels' is expanded, and 'Tabs' is selected. The main content area displays a 'Custom Object Tab' for 'Prices'. The tab label is 'Prices', the object is 'Price', and the tab style is 'Fan'. The tab was created by 'Bobba! Harshita Team' on 6/22/2025, 8:20 AM.

5.Billing

The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. On the left sidebar, under 'User Interface', 'Rename Tabs and Labels' is expanded, and 'Tabs' is selected. The main content area displays a 'Custom Object Tab' for 'Billing'. The tab label is 'Billings', the object is 'Billing', and the tab style is 'Dot'. The tab was created by 'Bobba! Harshita Team' on 6/22/2025, 8:22 AM.

So we get the required all custom tabs as below

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has a search bar and navigation links for 'Setup', 'Home', and 'Object Manager'. Under 'User Interface', 'Tabs' is selected. A message says 'Custom 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, there are two sections: 'Custom Object Tabs' and 'Web Tabs'. The 'Custom Object Tabs' section lists five tabs with their labels and styles:

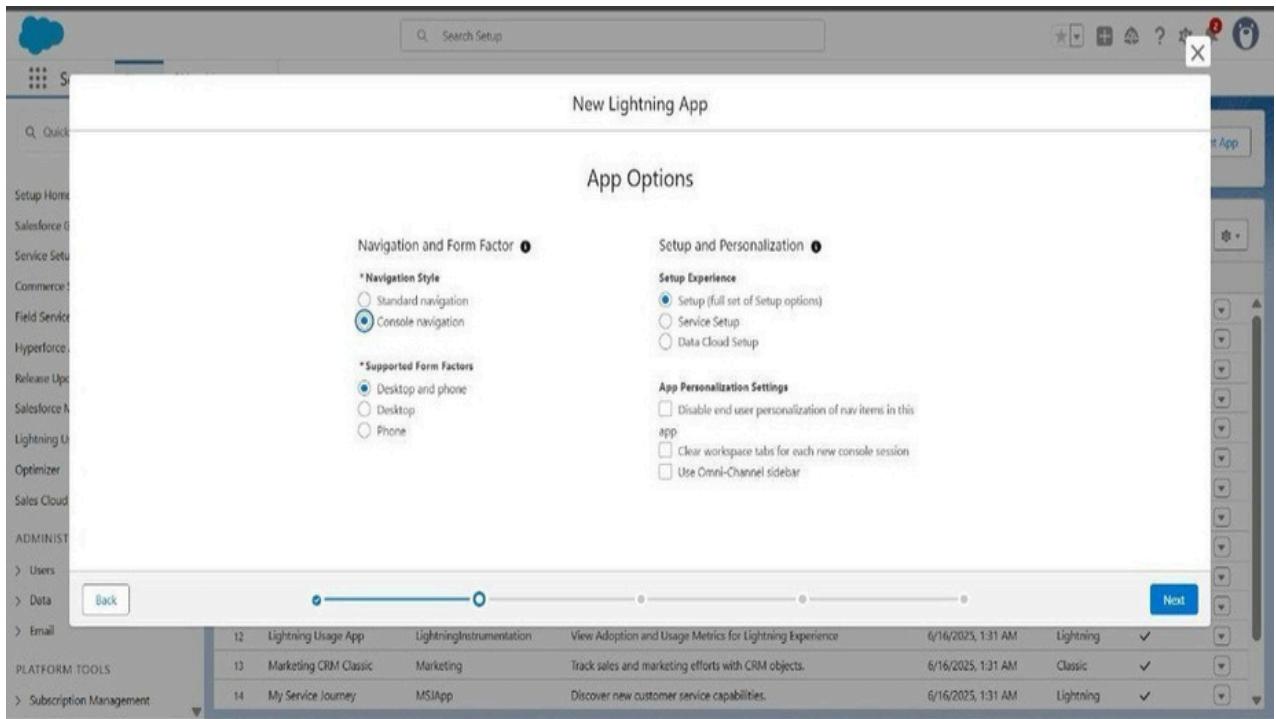
Action	Label	Tab Style	Description
Edit Del	Billings	Boat	
Edit Del	Customer Orders	Bell	
Edit Del	Items	Alarm clock	
Edit Del	Jewel Customers	Airplane	
Edit Del	Prices	Fan	

The 'Web Tabs' section says 'No Web Tabs have been defined'.

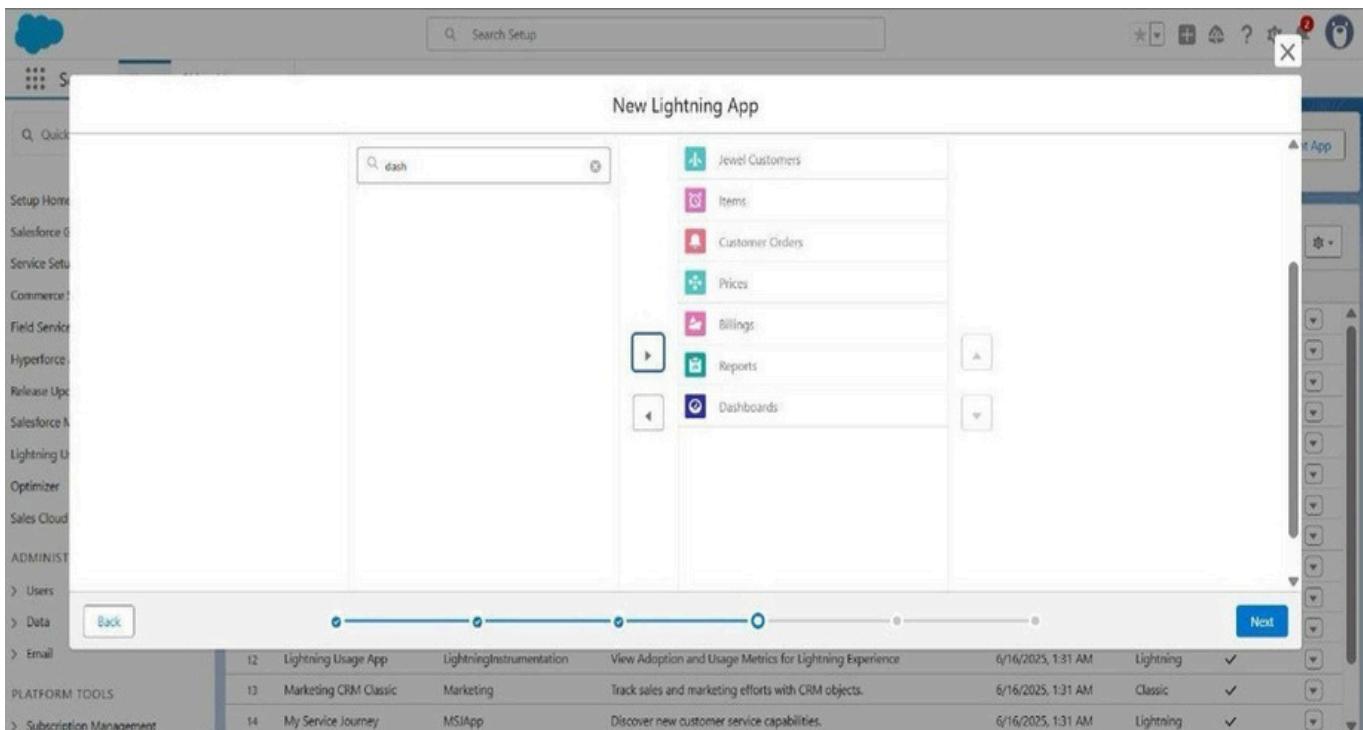
6.4 Creation of Lightning App

App Name: Jewelry Inventory System

The screenshot shows the Lightning App Builder interface with the 'App Details & Branding' tab selected. The left sidebar has links for 'Lightning App Builder', 'App Settings', 'Pages', and the current 'Jewelry Inventory System'. The main area has tabs for 'App Settings' (selected), 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', 'Navigation Rules', and 'User Profiles'. The 'App Details & Branding' section contains fields for 'App Name' (Jewelry Inventory System), 'Developer Name' (jewelry_Inventory_System), 'Image' (Upload button), 'Primary Color Hex Value' (#0070D2), 'Description' (Elevate your look with elegance), and 'Org Theme Options' (checkbox 'Use the app's image and color instead of the org's custom theme'). Below this is an 'App Launcher Preview' section showing a blue icon with 'ji' and the app name.



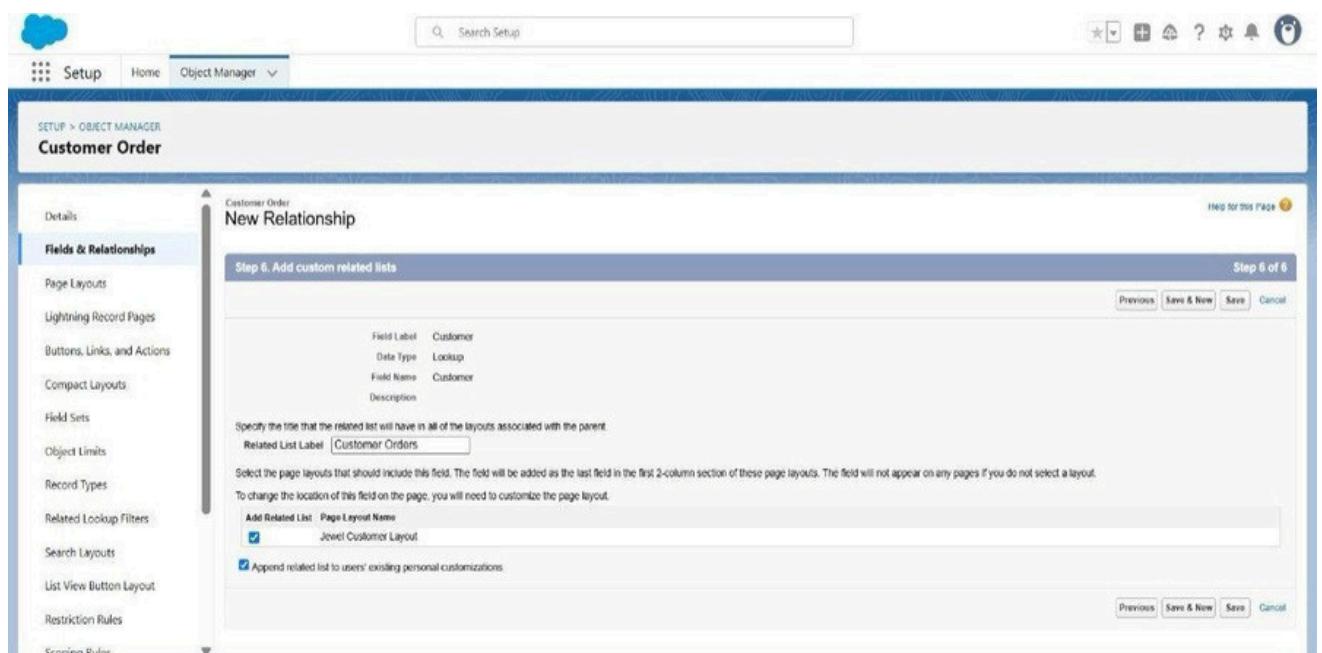
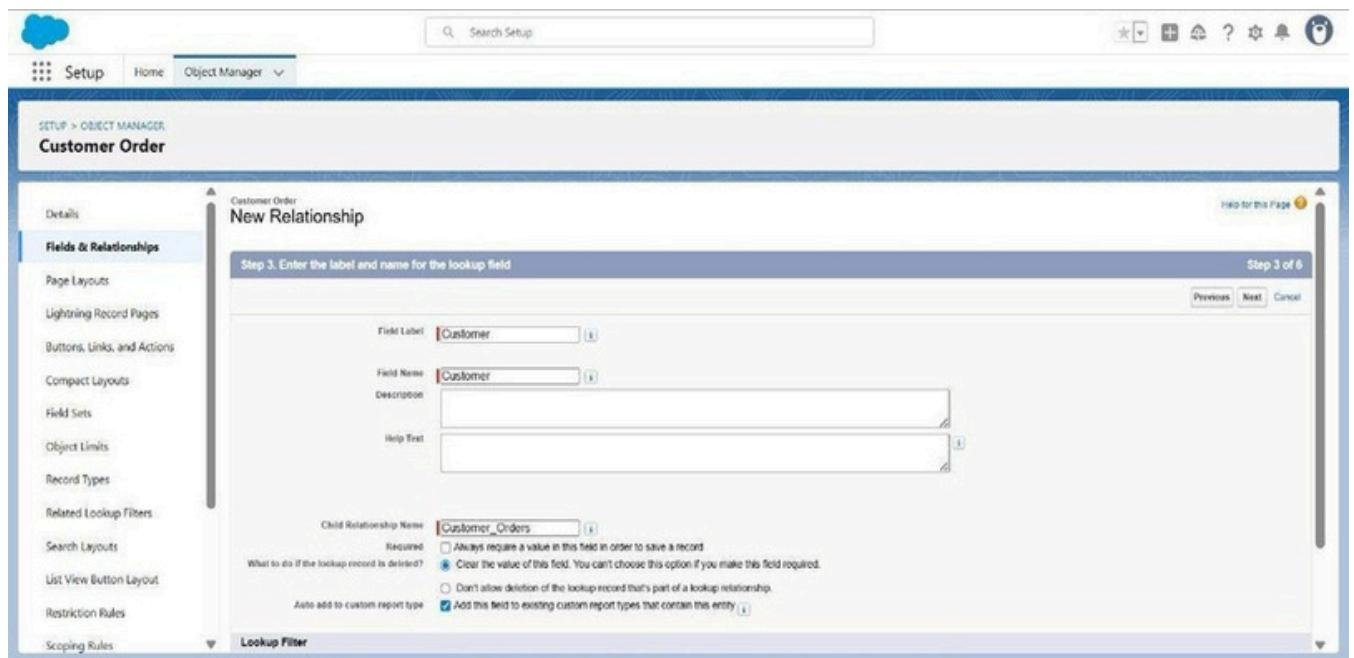
Navigation Items



6.5 Creation of Fields

1. Creating lookup relationship

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



2. Creating a Master-Detail Relationship

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

The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar lists various setup options under 'Customer Order'. The main area is titled 'Customer Order New Relationship' and 'Step 5 of 6'. It shows a field configuration for a Master-Detail relationship:

- 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.

The 'Add Field' section contains a checked checkbox labeled 'Customer Order Layout'.

The screenshot shows the Salesforce Setup interface for creating a new relationship, continuing from the previous step. The main area is titled 'Customer Order New Relationship' and 'Step 6 of 6'. It shows a field configuration for a Master-Detail relationship:

- 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.

The 'Related List Label' field is set to 'Customer Orders'. Below it, the 'Add Related List' section shows a checked checkbox labeled 'Item Layout'.

At the bottom, there is a checkbox for 'Append related list to users' existing personal customizations'.

3. Creating Text Field in Jewel Customer Object

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
Jewel Customer

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: City

Please enter the maximum length for a text field below:
Length: 20

Field Name: City

Description:

Help Text:

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

Unique: Do not allow duplicate values

External ID: Treat "ABC" and "abc" as duplicate values (case insensitive)
 Treat "ABC" and "abc" as different values (case sensitive)

Auto add to custom report type: Set this field as the unique record identifier from an external system
 Add this field to existing custom report types that contain this entry

Help for this Page

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
Jewel Customer

New Custom Field

Step 4. Add to page layouts Step 4 of 4

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.

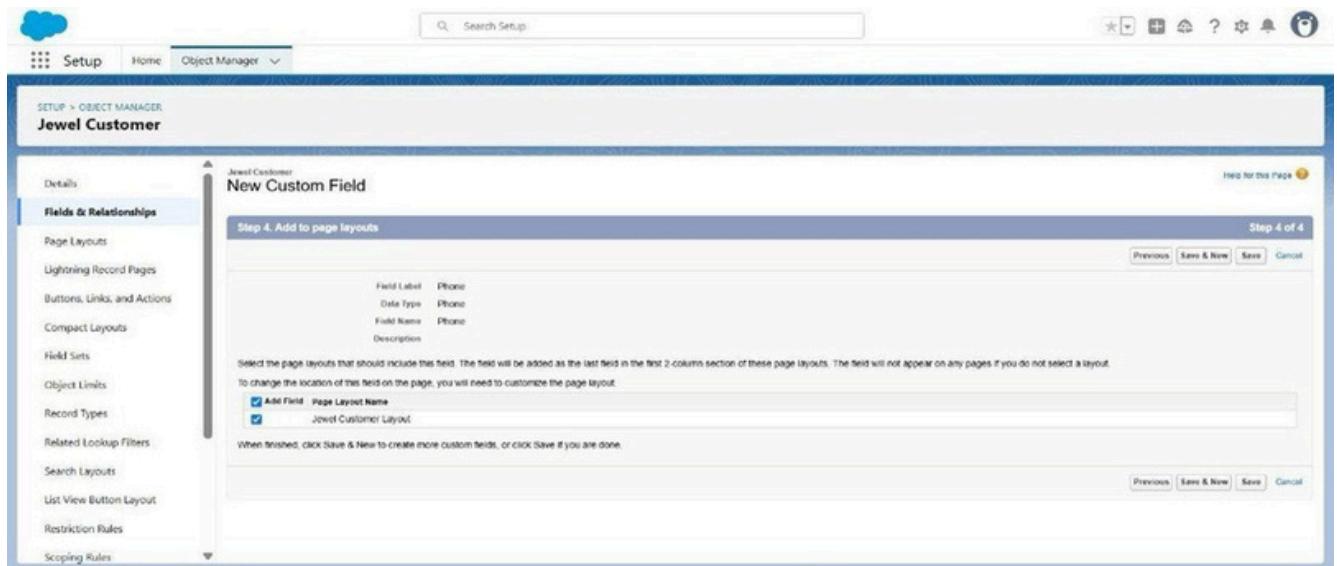
To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 Jewel Customer Layout

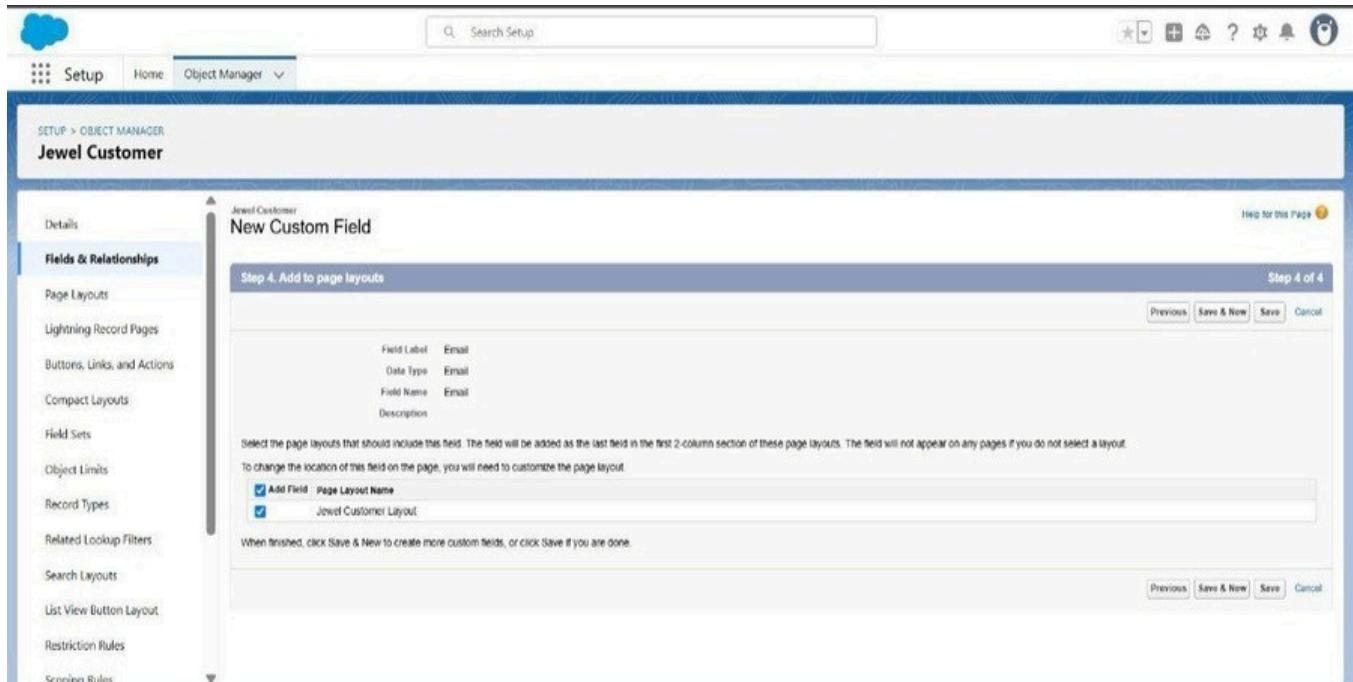
When finished, click Save & New to create more custom fields, or click Save if you are done.

Help for this Page

4. Creating the Phone field in object Jewel Customer



5. Creating the Email field in object Jewel Customer



6. Creating the number field in Item object

SETUP > OBJECT MANAGER
Item

New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label: Purity
Data Type: Number
Field Name: Purity
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
 Item Layout

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

Previous Save & New Save Cancel

7. Creating Picklist Field in Item Object

SETUP > OBJECT MANAGER
Item

New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label: Item Type
Data Type: Picklist
Field Name: Item_Type
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
 Item Layout

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

Previous Save & New Save Cancel

8. Creating Currency Field in Price Object

Setup > OBJECT MANAGER

Price

New Custom Field

Step 3. Establish field-level security

Field Label: Gold Price
Data Type: Currency
Field Name: Gold_Price
Description:

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.

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

Setup > OBJECT MANAGER

Item

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Gross Margin = Amount - Cost | [More Examples...](#)

Simple Formula | Advanced Formula

Gold Price (Currency) = $\text{Gross Margin} - \text{Amount} * \text{Cost} / 10$

Insert Field | Insert Operator | Functions

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Quick Tips

- Getting Started
- Operators & Functions

The screenshot shows the Salesforce Setup interface under the Object Manager for an 'Item' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'New Custom Field' and is on 'Step 5 of 5'. The field details are as follows:

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

Below these details, instructions say: "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" (selected) and "Page Layout Name", and another checkbox "Item Layout" (selected). At the bottom, it says "When finished, click Save & New to create more custom fields, or click Save if you are done." Navigation buttons at the top right include 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

The screenshot shows the Salesforce Setup interface under the Object Manager for a 'Jewel Customer' object. The left sidebar lists various setup categories. The main area is titled 'Fields & Relationships' and displays a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Country	Country__c	Text(10)		
Created By	CreatedBy	Lookup(User)		
Customer Name	Name	Text(80)		✓
Email	Email__c	Email		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Phone	Phone__c	Phone		

2.Price : Silver Price

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. Under the 'Price' object, the 'Fields & Relationships' tab is active. The table lists the following fields:

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.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. Under the 'Item' object, the 'Fields & Relationships' tab is active. The table lists the following fields:

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

The screenshot shows the Salesforce Setup interface with the following details:

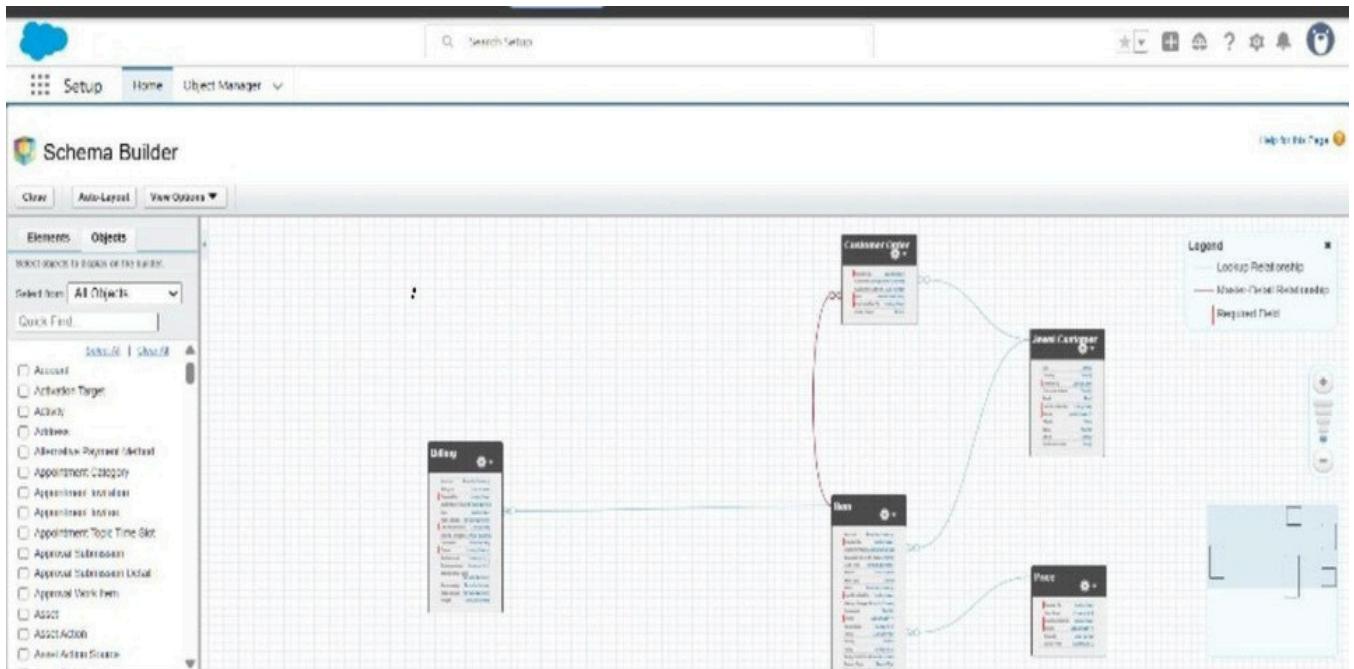
- Setup** tab selected in the top navigation bar.
- Object Manager** selected in the dropdown menu.
- Customer Order** object selected in the main area.
- Fields & Relationships** section selected in the left sidebar.
- Fields & Relationships** table header: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, INDEXED.
- Rows in the table:**
 - 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.

The screenshot shows the Salesforce Setup interface with the following details:

- Setup** tab selected in the top navigation bar.
- Object Manager** selected in the dropdown menu.
- Billing** object selected in the main area.
- Fields & Relationships** section selected in the left sidebar.
- Fields & Relationships** table header: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, INDEXED.
- Rows in the table:**
 - Amount: Amount__c, Formula (Currency)
 - Billing Id: Name, Auto Number
 - Created By: CreatedBy, 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: LastModifiedBy, Lookup(User)
 - Making Charges: Making_Charges__c, Formula (Currency)

11. Creation of Schema Builder



12. Creation of Field Dependencies

Action	Controlling Field	Dependent Field	Modified By
Edit Del Priority		Expected Days Of Return	Bobadali Harshita Team, 6/23/2025, 6:03 AM

13. Creation of Validation Rules

The screenshot shows the 'Jewel Customer Validation Rule' configuration in the Salesforce Object Manager. The rule is named 'Postal_Code' and is active. The validation formula is set to AND/OR logic, checking if the postal code length is less than 6 or if it does not match a regex pattern (not starting with 09). The error message is 'Must contain 6 digits'. The error location is 'Zip/Postal code'. The rule was created by 'Bobabdi Harshitha Team' on 6/23/2025 at 6:58 AM and modified by the same team on the same date.

Validation Rule Detail

Rule Name	Postal_Code
Error Condition Formula	AND/OR LEN(Zip_Postal_code__c) < 6, NOT(REGEX(Zip_Postal_code__c, "^(09)([0-9]{5})"))).
Error Message	Must contain 6 digits
Description	Created By: Bobabdi Harshitha Team, 6/23/2025, 6:58 AM
Created By	Modified By: Bobabdi Harshitha Team, 6/23/2025, 6:58 AM

The screenshot shows the 'Jewel Customer Validation Rule' configuration in the Salesforce Object Manager. The rule is named 'ValidationRule_Por_JewelCustomerObject' and is active. The validation formula is set to OR logic, checking if any of the fields (City, Country, Phone, State, Street) are blank. The error message is 'Please fill required fields'. The error location is 'Top of Page'. The rule was created by 'Bobabdi Harshitha Team' on 6/23/2025 at 7:00 AM and modified by the same team on the same date.

Validation Rule Detail

Rule Name	ValidationRule_Por_JewelCustomerObject
Error Condition Formula	OR(ISBLANK(City__c), ISBLANK(Country__c), ISBLANK(Phone__c), ISBLANK(State__c), ISBLANK(Street__c))
Error Message	Please fill required fields
Description	Created By: Bobabdi Harshitha Team, 6/23/2025, 7:00 AM
Created By	Modified By: Bobabdi Harshitha Team, 6/23/2025, 7:00 AM

6.6 Creation of Profiles

We create the goldsmith profile and the worker profile

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The 'Worker Profile' is highlighted. The 'Profile Detail' section shows the profile's name, license, description, and creation/modification details. The 'Page Layouts' section lists standard object layouts for various objects like Global, Email Application, Home Page Layout, and Account, along with their respective lead and location assignments.

6.7 Creation of Roles

The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. A hierarchical list of roles is shown under the 'Ideal Institute of Technology' organization. The roles listed include CEO, CFO, COO, Gold Smith, Worker, SVP, Customer Service & Support, Customer Support, International, and Customer Support, North America. Each role has edit, delete, and assign permissions available.

6.8 Creation of Users

SETUP

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Data

Email

PLATFORM TOOLS

Subscription Management

Apps

Feature Settings

SETUP

Users

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. Let's Go

VIEW: All Users | Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Fixed	Chatter	chatty000000000000000000@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	ERIC_OrgEmail	ERIC	eric.000000000000000000@orgfarm.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Mikael_Kol	Mikael	mikael@gmail.com	Walter	<input checked="" type="checkbox"/>	Walter Profile
<input type="checkbox"/>	Mikael_Nilsus	Nilsen	nilson@gmail.com	Cold Smith	<input checked="" type="checkbox"/>	Cold Smith
<input type="checkbox"/>	Team_Bobba_Healthita	bob	bobbahealthita1974@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User_Integration	inter	integration@000000000000000000@miguelo.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@000000000000000000@miguelo.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User | Reset Password(s) | Add Multiple Users

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

6.9 Creation of Page Layouts

We create the page layouts for gold and silver items

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

List View Button Layout

Page Layout for Gold

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

Section	Customer Name	Item Type	Ornament	Priority	Silver Price	Weight
Blank Space	Expected Days Of ...	KIM	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	

Item Sample

Highlights Panel

Customize the highlights panel for this page layout.

Quick Actions in the Salesforce Classic Publisher

Actions in this section are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning Experience Actions

Creation of 6.10 Record Types

We create the gold an silver records

Record Type Label	Description	Active	Modified By
Gold	Gold Items Information	✓	Babbadi Harshitha Team, 6/25/2025, 4:27 AM
Silver	Silver Items Information	✓	Babbadi Harshitha Team, 6/23/2025, 12:15 PM

6.11 Creation of Permission Sets

API Name	Namespace Prefix
Per_to_Worker	Bobcat

Trigger

6.12 Creation of

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

```
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 }
```

The screenshot shows the Salesforce IDE interface with the file `UpdatePaidAmountTrigger.apxt` open. The code defines a trigger named `UpdatePaidAmountTrigger` on the `Billing__c` object, firing before insert or update. It calls the `handleBeforeInsert` and `handleBeforeUpdate` methods of the `UpdatePaidAmountTriggerHandler` class based on the trigger type.

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

User Adoption

6.13 Creation of

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

The screenshot shows a Microsoft Dynamics 365 list view for 'Prices'. The title bar says 'jewelry Inventory Sy... Prices'. The top navigation bar includes 'Search...', 'New', 'Import', 'Change Owner', and 'Assign Label' buttons. A 'Recently Viewed' section shows 10 items, each with a checkbox and a price ID: Price-10, Price-09, Price-08, Price-07, Price-06, Price-05, Price-04, Price-03, Price-02, and Price-01. The list has a standard header row with columns for Price Id, Name, and other details.

The screenshot shows a Microsoft Dynamics 365 list view for 'Jewel Customers'. The title bar says 'jewelry Inventory Sy... Jewel Customers'. The top navigation bar includes 'Search...', 'New', 'Import', 'Change Owner', and 'Assign Label' buttons. A 'Recently Viewed' section shows 10 items, each with a checkbox and a customer name: Arjun, Joshua, Anand, Krishna, Sita, Nani, Shyamala, Manasa, Ravi, and Devi. The list has a standard header row with columns for Customer Name, Email, and other details.

Reports

6.14 Creation of Reports

The screenshot shows the Microsoft Power BI interface for report management. The top navigation bar includes a cloud icon, a search bar, and various system icons. Below the navigation is a breadcrumb trail: 'jewelry Inventory Sy... > Reports'. The main area is titled 'Recent' and displays three items:

Report Name	Description	Folder	Created By	Created On	Subscribed
Billings with Items and Customer Order		Private Reports	Bobbadli Harshitha Team	6/25/2025, 10:44 AM	
New Item with Billings Report		Private Reports	Bobbadli Harshitha Team	6/25/2025, 10:43 AM	
New Prices Report		Private Reports	Bobbadli Harshitha Team	6/25/2025, 9:56 AM	

On the left sidebar, there are filters for 'Reports', 'Recent' (selected), 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports'. There are also sections for 'FOLDERS' (All Folders) and 'FAVORITES' (All Favorites). The bottom right corner has buttons for 'New Report' and 'New Folder'.

6.15 Creation of Dashboards

Dashboard 1

The screenshot shows the Microsoft Power BI interface for dashboard creation. The top navigation bar includes a cloud icon, a search bar, and various system icons. Below the navigation is a breadcrumb trail: 'jewelry Inventory Sy... > Dashboards > Dashboard1'. The dashboard title is 'Dashboard1' and it was last viewed on 'As of Jun 27, 2025, 6:43 AM' by 'Bobbadli Harshitha Team'. The dashboard contains three visualizations:

- New Item with Billings Report:** A donut chart showing record counts for different categories. The data is as follows:

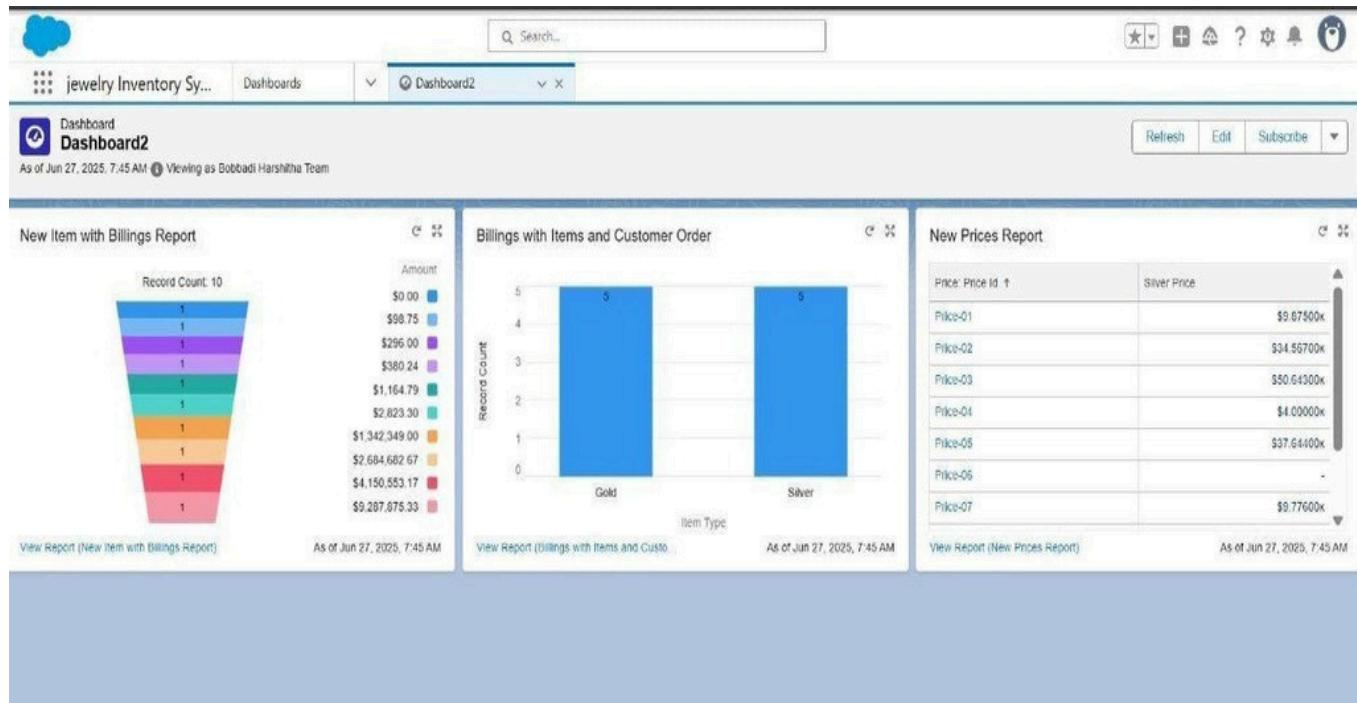
Category	Count
1	1
1	1
10	10
1	1
1	1
- Billings with Items and Customer Order:** A bar chart comparing the number of records for Gold and Silver items. The data is as follows:

Item Type	Record Count
Gold	5
Silver	5
- New Prices Report:** A treemap chart showing the sum of silver prices across different price ranges. The data is as follows:

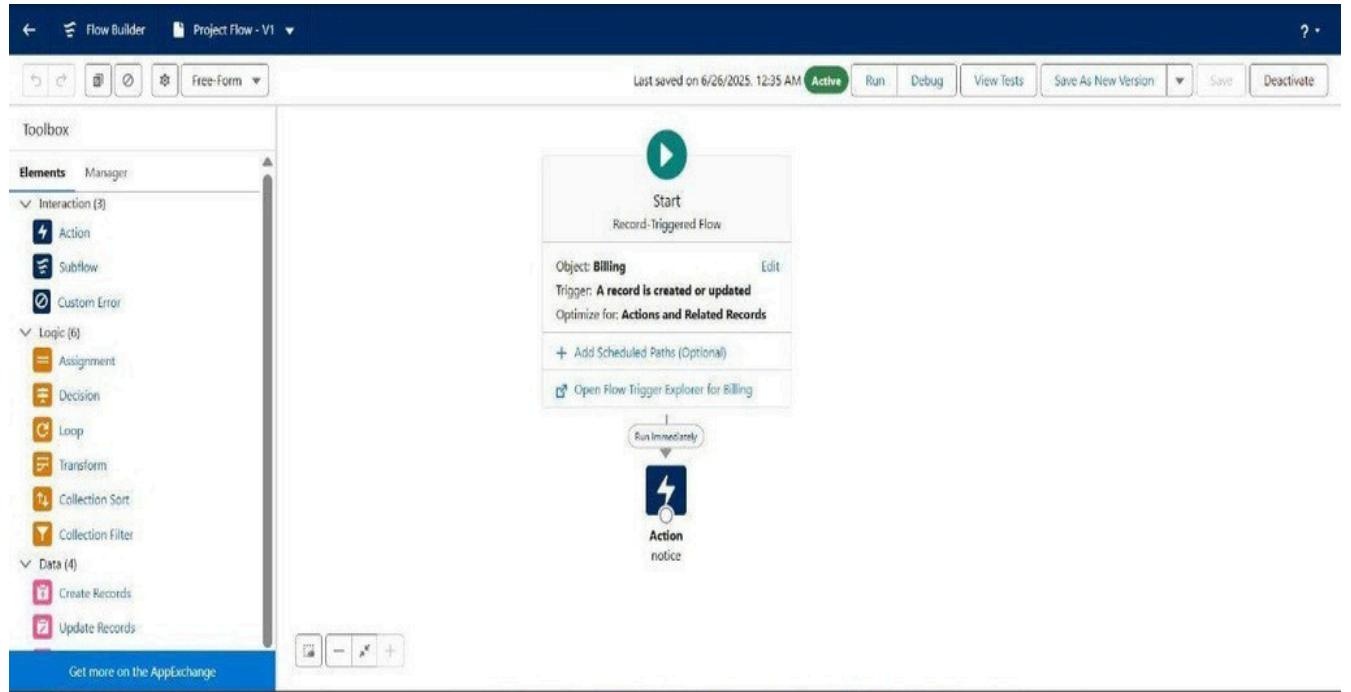
Price Range	Sum of Silver Price
\$0.00	\$132k
\$0.75	\$24,760.0000
\$2.96	\$56,987.0000
\$3.80	\$87,864.0000
\$1.16	\$76,534.0000
\$2.82	\$38k

Each visualization has a 'View Report' link and a timestamp ('As of Jun 27, 2025, 6:43 AM'). The bottom right corner has buttons for 'Refresh', 'Edit', and 'Subscribe'.

Dashboard 2

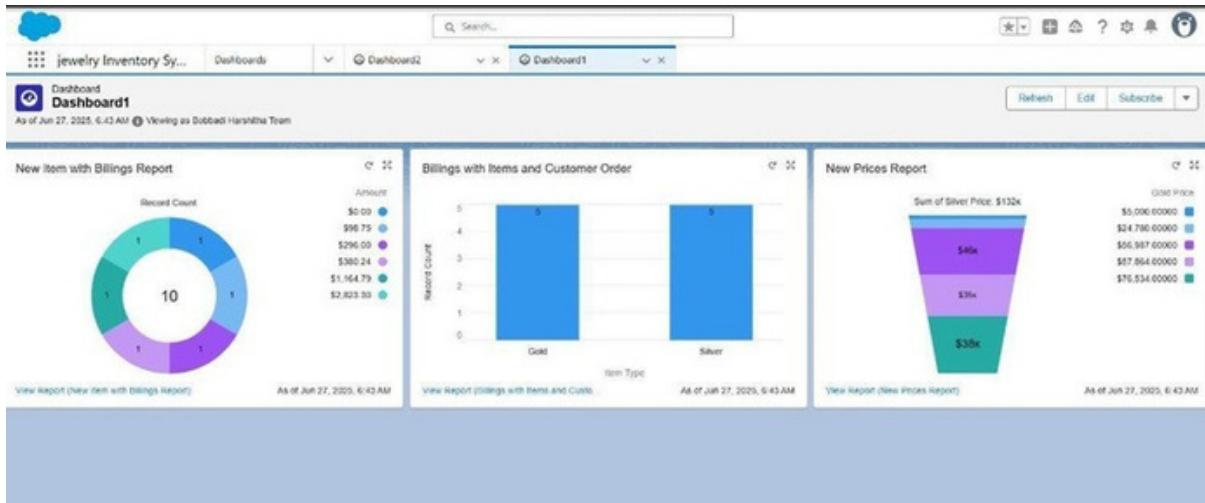


6.16 Creation of Flows



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.

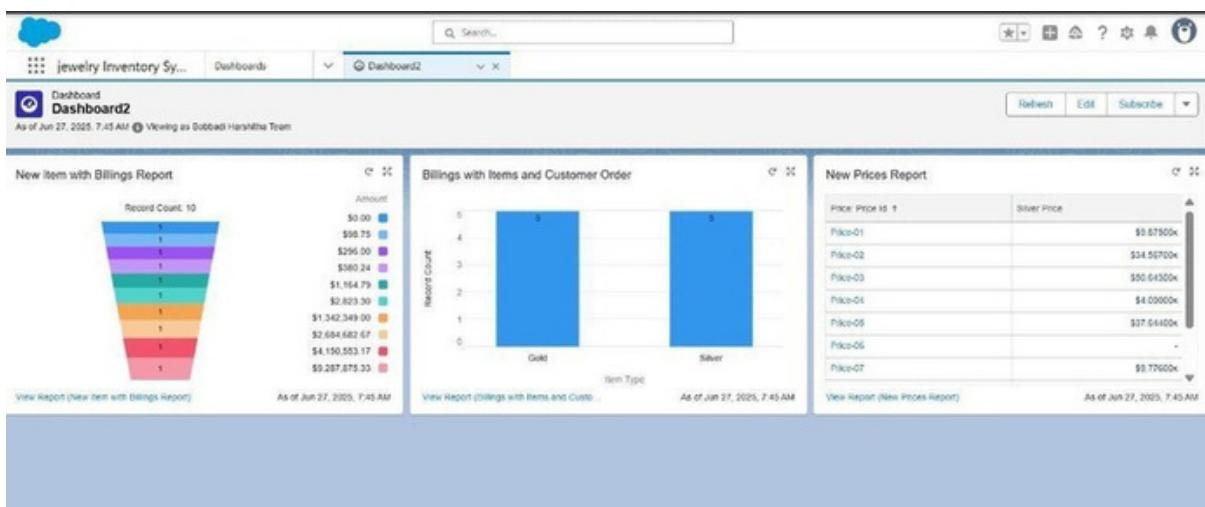
2. Enhance Customer Order Management:

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.

Project 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):

- StockAlert for LowInventory
- 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

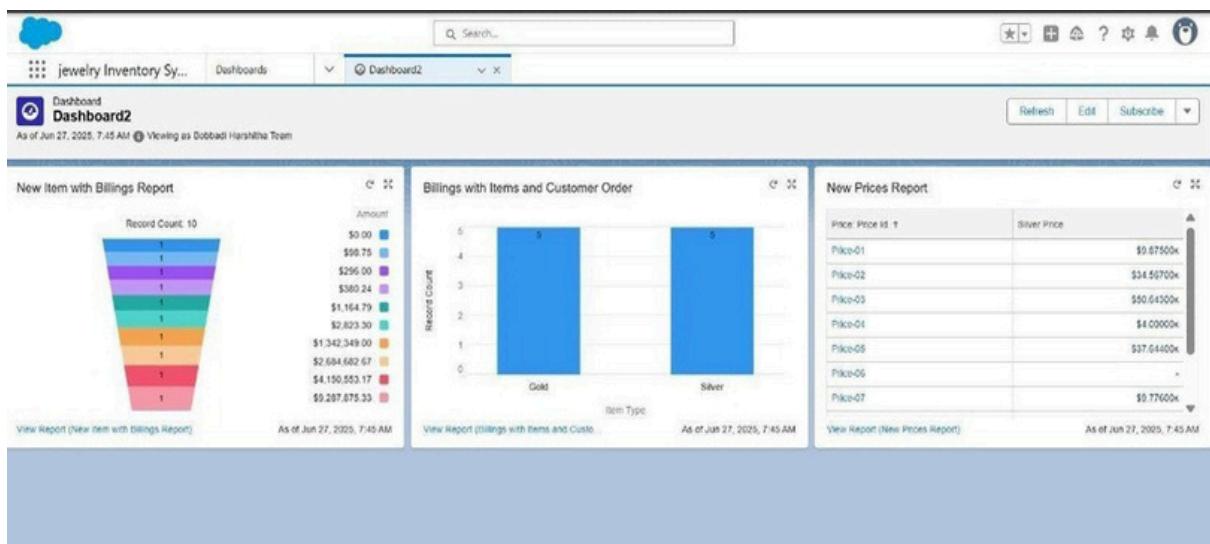
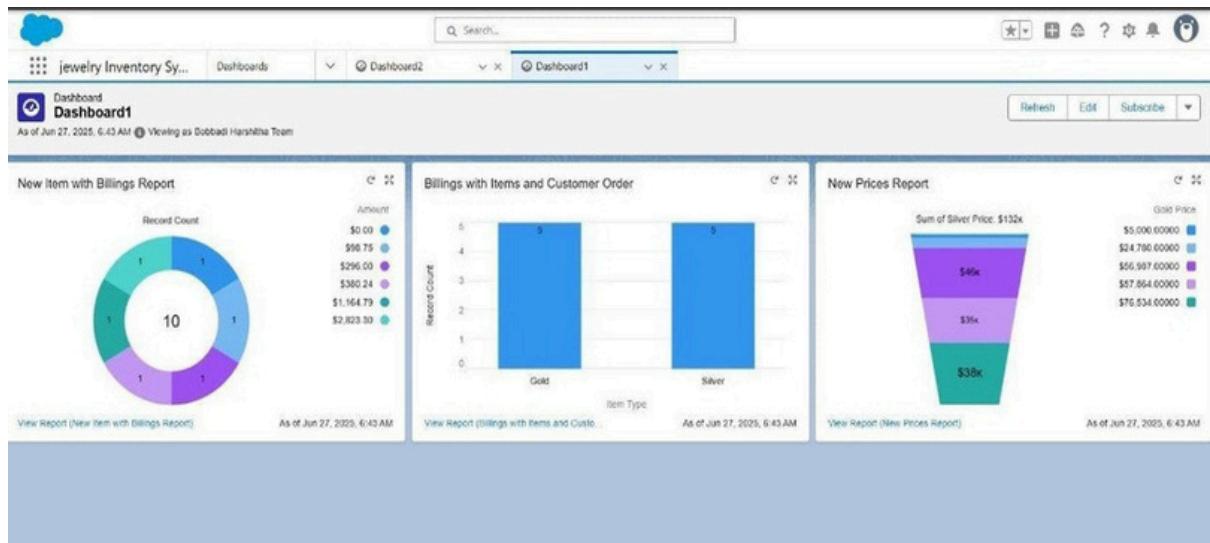
• Stock Reorder Requests

- Approval triggered when reorder level is reached

•Notifications

- In-app and email notifications sent for each approval or rejection

Dashboards:



Reports:

The screenshot shows a report titled "Report: Prices New Prices Report". The top navigation bar includes a search field, a gear icon, and various reporting and analytical tools. The report itself displays a table of data with columns for Gold Price, Price Id, and Silver Price. The table shows several rows of price data, with subtotals and a grand total at the bottom. The interface includes standard reporting controls like Row Counts, Detail Rows, Subtotals, and Grand Total.

Gold Price	Price Id	Silver Price
\$0.0000 (1)	Price-06	\$0.0000
Subtotal		\$0.0000
\$0.0000 (1)	Price-04	\$4.000000
Subtotal		\$4.000000
\$14.780.0000 (1)	Price-03	\$9.875.0000
Subtotal		\$9.875.0000
\$56.987.0000 (1)	Price-05	\$45.879.0000
Subtotal		\$45.879.0000
\$67.864.0000 (1)	Price-02	\$34.087.0000
Subtotal		\$34.087.0000
\$78.534.0000 (1)	Price-06	\$37.644.0000
Subtotal		\$37.644.0000
\$86.530.0000 (1)	Price-08	\$40.852.0000
Row Counts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Detail Rows	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Subtotals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Grand Total	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The screenshot shows a report titled "Report: Item with Billings New Item with Billings Report". The interface is similar to the previous one, with a top navigation bar and reporting controls. The table displays data with columns for Amount, Item Id, and Billing Id. The data shows several items with their respective billing details and subtotals, ending with a grand total. Reporting controls for Row Counts, Detail Rows, Subtotals, and Grand Total are present.

Amount	Item Id	Billing Id
\$0.00 (1)	Item-08	Billing-06
Subtotal		
\$58.75 (1)	Item-02	Billing-03
Subtotal		
\$296.00 (1)	Item-09	Billing-04
Subtotal		
\$380.24 (1)	Item-04	Billing-07
Subtotal		
\$1,154.29 (1)	Item-06	Billing-09
Subtotal		
\$2,623.30 (1)	Item-10	Billing-02
Subtotal		
\$1,042,349.00 (1)	Item-01	Billing-01
Row Counts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Detail Rows	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Subtotals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Grand Total	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The screenshot shows a report titled "Report: Billings with Items and Customer Order Billings with Items and Customer Order". The interface is consistent with the others. The table displays data with columns for Item Type, Item Id, and Billing Id. The data is categorized by item type (Gold and Silver) and shows individual items with their corresponding billings and subtotals, concluding with a total. Reporting controls for Row Counts, Detail Rows, Subtotals, and Grand Total are included.

Item Type	Item Id	Billing Id
Gold (5)	Item-01	Billing-01
	Item-03	Billing-05
	Item-06	Billing-06
	Item-05	Billing-08
	Item-07	Billing-10
Subtotal		
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'. The flow is of type 'Record-Triggered After Save Flow' and is associated with the 'Billing' object. It was created by 'Bobbadli_Harshitha Team' on 6/25/2025 at 12:04 PM and last modified by the same team on 6/25/2025 at 12:05 PM. The flow is currently active. The 'Details' tab is selected, showing information such as API Name (Project_Flow), Flow Type (Record-Triggered After Save Flow), and Segment. The 'Information' section includes fields for Flow Label (Project Flow), Description, Associated Record, and Category.

The screenshot shows the Salesforce Flow Builder interface for the 'Project Flow - V1' version. The flow is a 'Record-Triggered Flow' for the 'Billing' object, triggered by 'A record is created or updated'. The flow consists of a single step: an 'Action' element labeled 'notice'. The 'Action' element has a 'Run Immediately' checkbox checked. The flow is currently active. The builder interface includes a toolbox on the left with categories like Interaction, Logic, and Data, and various tool buttons at the top.

Triggers:

The screenshot shows the Salesforce Setup interface with the Object Manager selected for the Billing object. The left sidebar contains navigation links for 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 was created by "Bobbadi Harshitha Team" on 6/24/2025, 10:48 AM.

The screenshot shows the Apex Trigger detail page for "UpdatePaidAmountTrigger". The page includes a back-to-list link, edit, delete, download, and show dependencies buttons. It displays the trigger's name, code coverage (0%), creation date (6/24/2025, 10:47 AM), and last modified date (6/24/2025, 10:48 AM). The trigger is associated with the Billing object type and is active. The trigger code is listed below:

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

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 auto-syncing 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.