

CRM APPLICATION FOR JEWEL MANAGEMENT – (DEVELOPER)

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GOVERNMENT ARTS AND SCIENCE COLLEGE – AVINASHI
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1. INTRODUCTION

1.1 Project Overview

The **Jewel Inventory System** is a comprehensive software solution developed to streamline and manage the inventory and sales operations of jewellery stores and manufacturers. This system is designed to provide an efficient and user-friendly platform for tracking jewellery items, maintaining accurate inventory records, and supporting seamless sales transactions. By automating key processes, the Jewel Inventory System enhances operational efficiency, reduces manual errors, and ensures better control over stock and customer management.

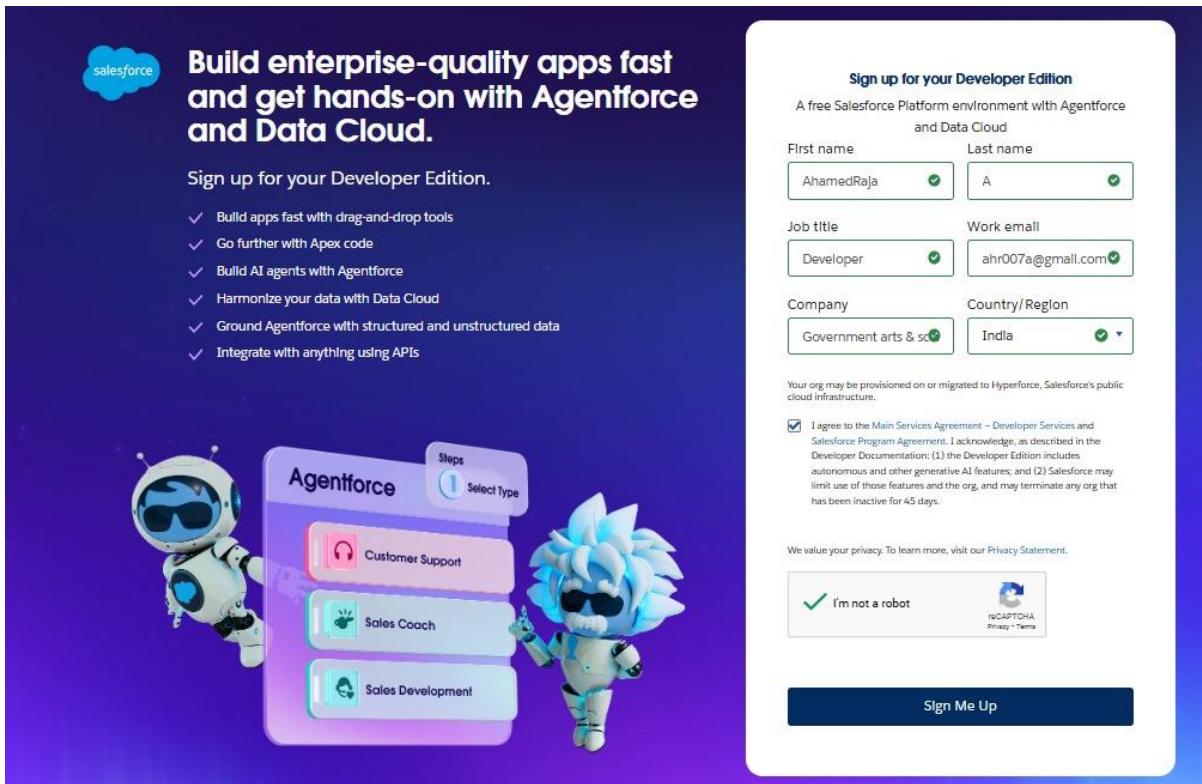
1.2 Purpose of the project

The purpose of the Jewel Inventory System is to develop a computerized solution that simplifies the management of jewellery inventory and sales activities. The system is intended to replace traditional manual methods with an efficient and user-friendly application that ensures accurate record keeping, easy tracking of jewellery items, and smooth handling of sales transactions. By providing better control over stock and reducing human errors, the project aims to improve operational efficiency and support effective decision-making for jewellery businesses.

DEVELOPMENT PROCESS

Creating a Developer Account

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



Account Activation Process

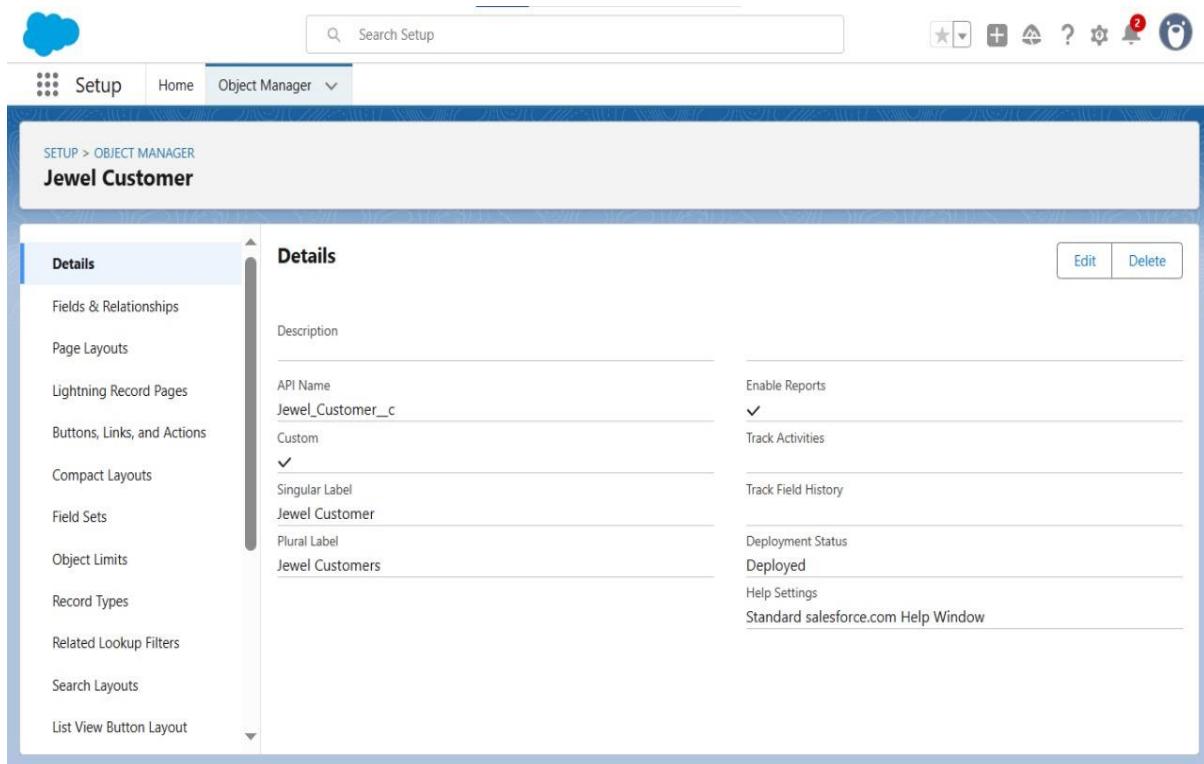
- Open your Email box and click **Reset Password** link (wait for 5 – 10 minutes if needed).
- Enter a **New password** and answer for the security question and then click **Change Password**.
- You will be redirect to your **Salesforce set up page**.

OBJECTS :

Create Objects

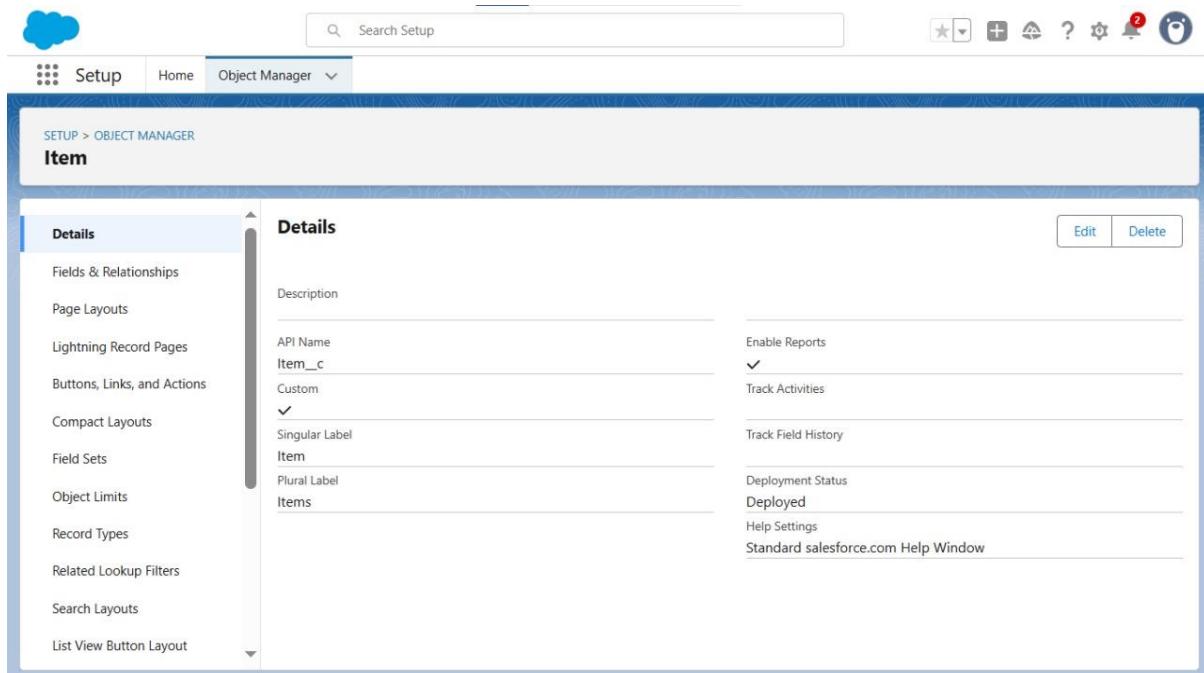
- Jewel Customer
- Item
- Customer Order
- Price
- Billing

1.Jewel Customer Object :



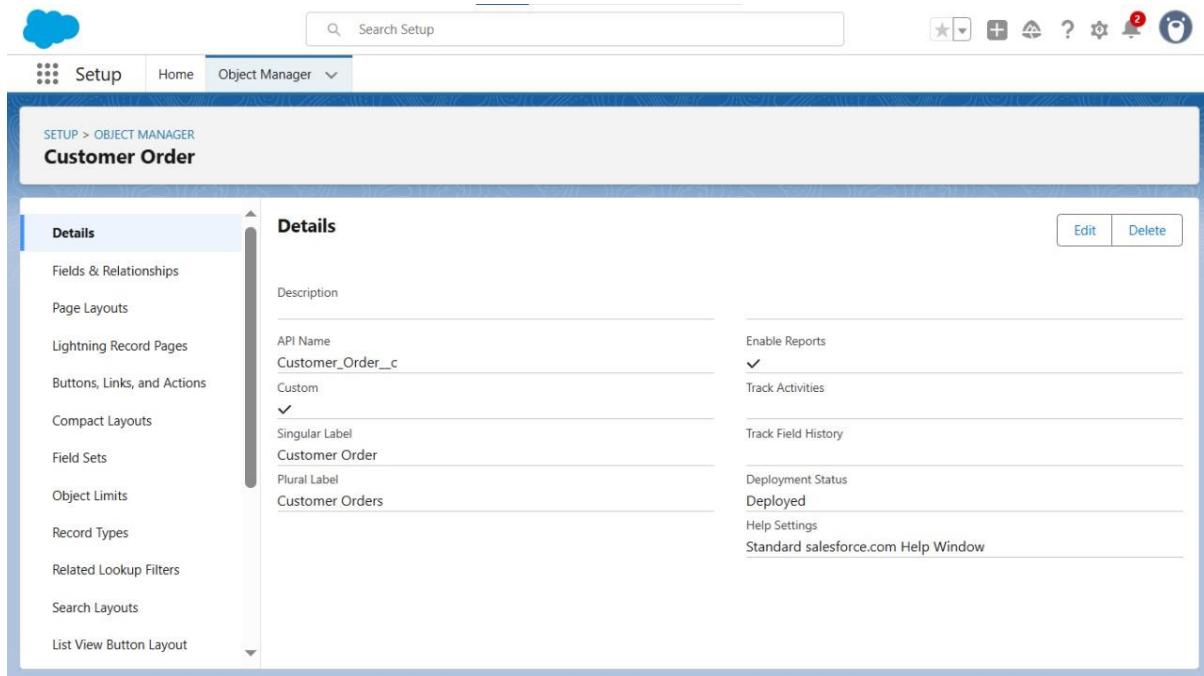
The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The page title is 'Jewel Customer'. On the left, a sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main panel displays the 'Details' section for the 'Jewel Customer' object. The API Name is set to 'Jewel_Customer__c'. The singular label is 'Jewel Customer' and the plural label is 'Jewel Customers'. Other settings include 'Enable Reports' checked, 'Track Activities', 'Track Field History', 'Deployment Status' set to 'Deployed', and 'Help Settings' pointing to 'Standard salesforce.com Help Window'. There are 'Edit' and 'Delete' buttons at the top right.

2.Item Objects



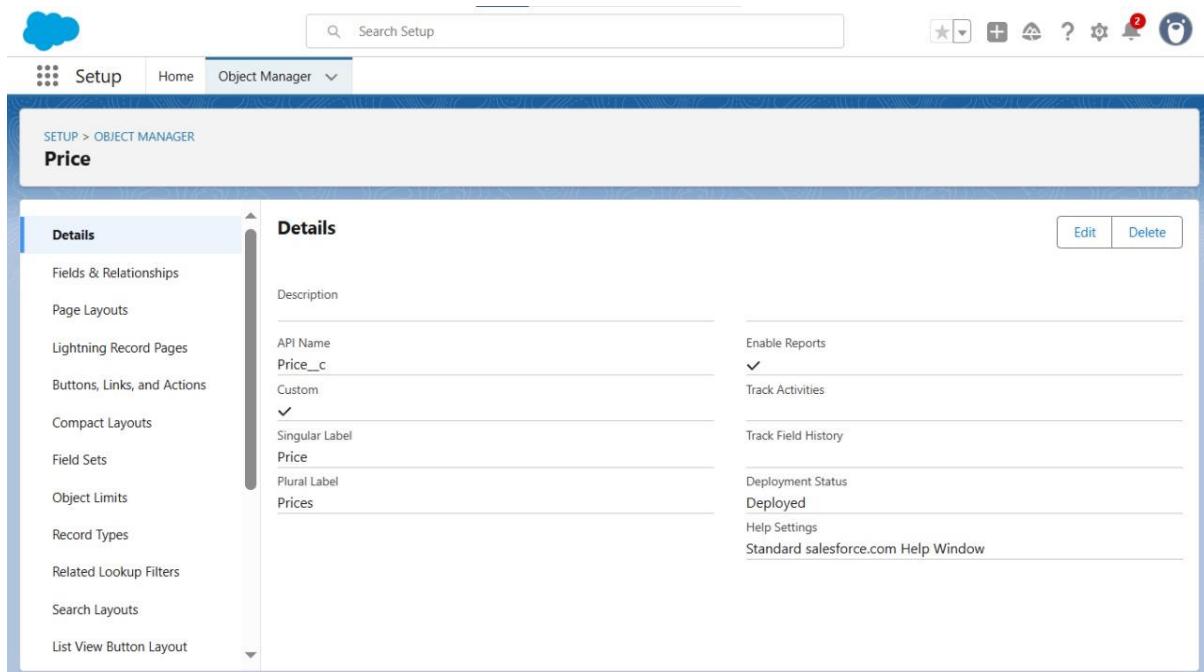
The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The page title is 'Item'. The left sidebar is identical to the previous screenshot, listing Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main panel displays the 'Details' section for the 'Item' object. The API Name is set to 'Item__c'. The singular label is 'Item' and the plural label is 'Items'. Other settings include 'Enable Reports' checked, 'Track Activities', 'Track Field History', 'Deployment Status' set to 'Deployed', and 'Help Settings' pointing to 'Standard salesforce.com Help Window'. There are 'Edit' and 'Delete' buttons at the top right.

3.Customer Order Object



The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected in the top navigation bar. The main title is 'Customer Order'. On the left, a sidebar lists various configuration options: 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 right panel displays the 'Details' section for the Customer Order object. It includes fields for Description, API Name (Customer_Order__c), Singular Label (Customer Order), Plural Label (Customer Orders), and several checkboxes for reporting, tracking, and deployment settings. Buttons for 'Edit' and 'Delete' are located at the bottom right.

4.Price Object



The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected in the top navigation bar. The main title is 'Price'. The left sidebar and right panel structure are identical to the Customer Order object, showing the same configuration options and settings. The API name is listed as Price__c, and the singular label is Price, while the plural label is Prices.

5.Billing Object

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

- Header:** Search Setup, Home, Object Manager.
- Breadcrumb:** SETUP > OBJECT MANAGER
- Object Name:** Billing
- Details Panel:**
 - Description:** API Name: Billing_c, Custom: ✓, Singular Label: Billing, Plural Label: Billings.
 - 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

TABS :

- **Tab** in Salesforce is a user interface, It is used to create and View records of objects.
- Tabs can be perform different types that are **Customer, Web, Visualforce, Lightning Components**.
- They help businesses access stored data easily.

Created a Custom Tab :

create a **Customer Tab**, go to . **Setup → Tabs → New (Customer Object Tab)**. Select the object **Jewel Customer**, choose a tab style, and proceed with default profile and app settings. Click **Save** to complete the tab creation.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has a 'User Interface' section with 'Tabs' highlighted. The main content area is titled 'SETUP Tabs'. It includes a descriptive paragraph about different types of tabs and a table for managing 'Custom Object Tabs'. The table has columns for Action, Label, Tab Style, and Description. The 'Tab Style' column shows icons for 'Balls', 'Balls', 'Boat', 'Apple', and 'Balls' respectively. Below this are sections for 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs', each with a note indicating no tabs have been defined.

Action	Label	Tab Style	Description
Edit Del	Billings	Balls	
Edit Del	Customer Orders	Balls	
Edit Del	Items	Boat	
Edit Del	Jewel Customers	Apple	
Edit Del	Prices	Balls	

THE LIGHTNING APP :

- **A Lightning App** is a collection of objects, tabs, and tools grouped together in Salesforce for a specific purpose.
- It allows customization with logos, colors, utility bars, and Lightning page tabs.
- Users can easily switch between apps, improving navigation and efficiency.

Created Lightning App :

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

Navigation Rules

User Profiles

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name

* Developer Name

Description

App Branding

Image Primary Color Hex Value



Clear

Org Theme Options Use the app's image and color instead of the org's custom theme

App Launcher Preview



- To Create a new **Lightning App**, go to **Setup → App Manager → New Lightning App**.
- Enter the App name, Select image or colour.

New Lightning App

App Options

Navigation and Form Factor

* Navigation Style
 Standard navigation
 Console navigation

* Supported Form Factors
 Desktop and phone
 Desktop
 Phone

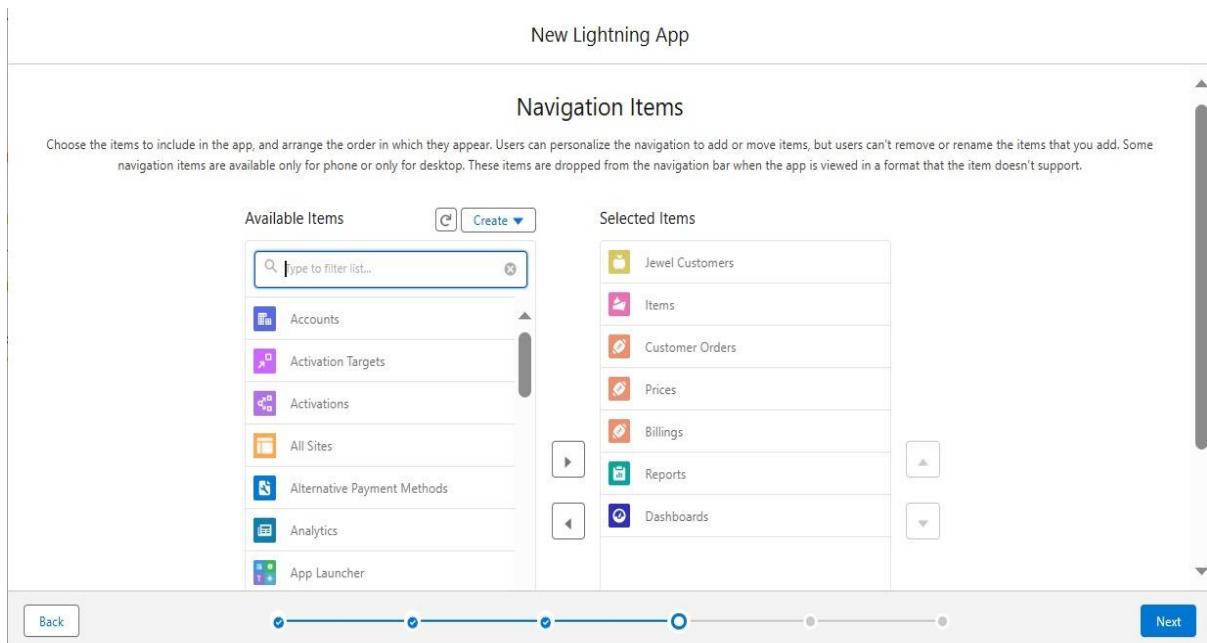
Setup and Personalization

Setup Experience
 Setup (full set of Setup options)
 Service Setup
 Data Cloud Setup

App Personalization Settings
 Disable end user personalization of nav items in this app
 Clear workspace tabs for each new console session
 Use Omni-Channel sidebar

Back  **Next**

This screen shows the **App Options** in Salesforce Lightning App setup, where you choose navigation style, supported devices, and personalization settings.



This screen shows the **Navigation Items setup** in Salesforce Lightning App, where you select and arrange objects (like Jewel Customers, Items, Orders, Reports, Dashboards) to be included in the app.

FIELDS :

- In Salesforce, Fields represent the data stored in object records, similar to columns in a database.
- They are of two types: Standard Fields (predefined like Created By, Owner, Last Modified) and Custom Fields (user-defined based on requirements).
- Fields make it easy to store, search, edit, and manage specific information for each object.

Configured Fields And Relationships :

Customer Order Fields And Relationships :

The screenshot shows the Salesforce Setup interface for the 'Customer Order' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main content area is titled 'Fields & Relationships' and displays a table with six items. The columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

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		▼

Jewel Customer Fields And Relationships :

The screenshot shows the Salesforce Setup interface for the 'Jewel Customer' object. The left sidebar lists various setup categories. The main content area is titled 'Fields & Relationships' and displays a table with eleven items. The columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City_c	Text(20)		▼
Country	Country_c	Text(18)		▼
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		▼
State	State_c	Text(20)		▼
Street	Street_c	Text(20)		▼
Zip/Postal code	Zip_Postal_code_c	Text(6)		▼

Items Fields And Relationships :

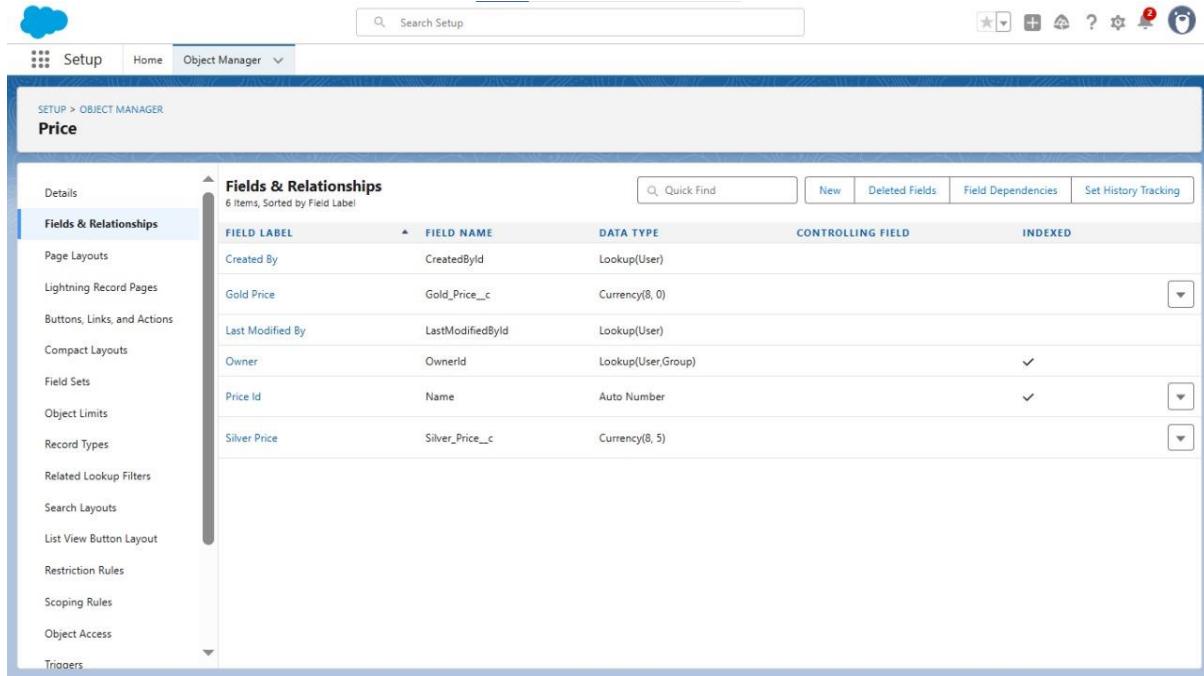
Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedBy	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	LastModifiedBy	Lookup(User)		
Making Charges	Making_Charges__c	Formula (Currency)		
Ornament	Ornament__c	Text(20)		

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Ornament	Ornament__c	Text(20)		
Owner	OwnerId	Lookup(User,Group)		
Percentage	Percentage__c	Number(2, 0)		
Prices	Prices__c	Lookup(Price)		
Priority	Priority__c	Picklist		
Purity	Purity__c	Number(2, 0)		
Purity Gold Price	Purity_Gold_Price__c	Formula (Currency)		
Record Type	RecordType	Record Type		
Silver Price	Silver_Price__c	Formula (Number)		
Stone Weight	Stone_Weight__c	Number(5, 5)		
Stone/Other Price	Stone_Other_Price__c	Currency(8, 2)		
Total Weight	Total_Weight__c	Formula (Number)		

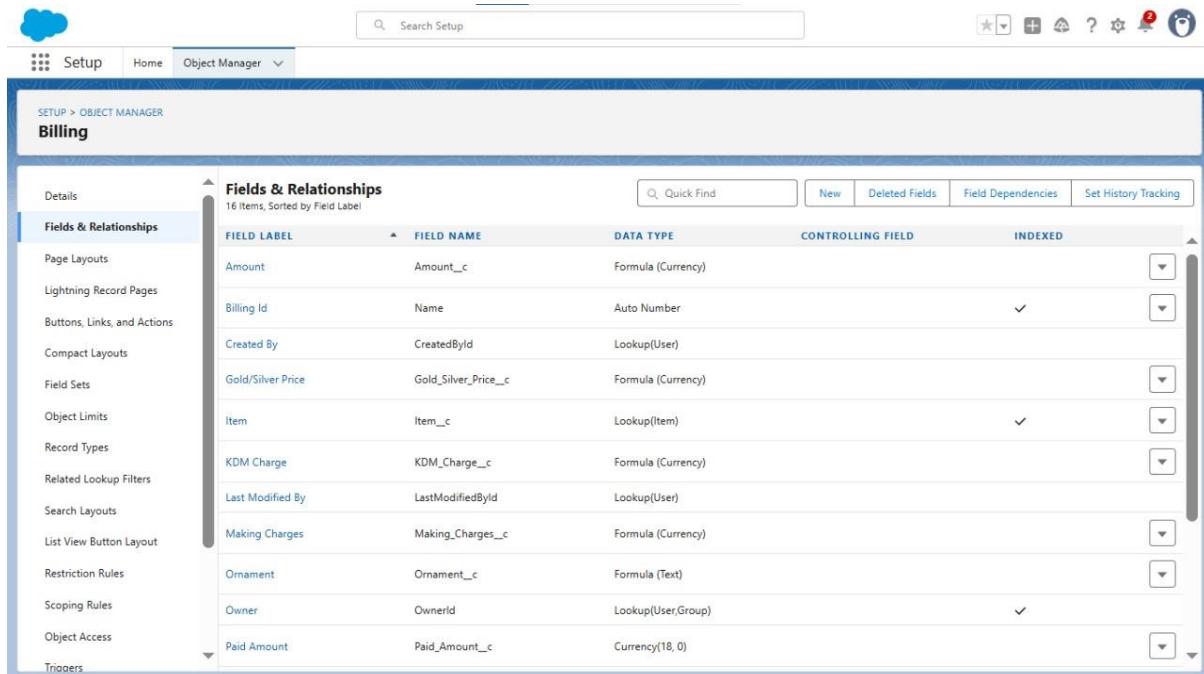
Price Fields And Relationships :



The screenshot shows the Salesforce Object Manager for the 'Price' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays the 'Fields & Relationships' section with 6 items, sorted by Field Label. The table columns include FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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)		

Billing Fields And Relationships :



The screenshot shows the Salesforce Object Manager for the 'Billing' object. The left sidebar lists various setup options. The main area displays the 'Fields & Relationships' section with 16 items, sorted by Field Label. The table columns include FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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)		
Owner	OwnerId	Lookup(User,Group)	✓	
Paid Amount	Paid_Amount__c	Currency(18, 0)		

Created The Field Dependencies :

The screenshot shows the Salesforce setup interface for creating a custom field named 'Priority'. The 'Fields & Relationships' tab is selected in the sidebar. The main panel displays the 'Custom Field Definition Detail' for 'Priority'. The 'Field Dependencies' tab is highlighted with a yellow box, and the 'New' button is also highlighted with a yellow box, indicating the step to create a new dependency.

Go to **Setup → Object Manager → Item → Fields & Relationships** and Open the **Priority** field.

The screenshot shows the 'New Field Dependency' creation page. It includes instructions for creating a dependent relationship. Step 1: Select a controlling field and a dependent field. Step 2: Edit filter rules for the dependent field. The 'Controlling Field' and 'Dependent Field' dropdowns are highlighted with yellow boxes.

Create a **new Field Dependency**, selecting Priority as the **controlling field** and Expected Days of Return as the **dependent field**.

Setup Home

Salesforce Go

Service Setup Assistant

Commerce Setup Assistant

Field Service Setup Home (Beta)

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- > Subscription Management
- > Apps
- > Feature Settings
- > Slack

Map the related values, click Include Values, and Save to complete.

Created the validation rule :

SETUP > OBJECT MANAGER

Jewel Customer

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

Object Access

Triggers

Jewel Customer Validation Rule

Validation Rule Detail

Rule Name	ValidationRule_For_JewelCustomerObject	Active
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	Error Location Top of Page
Description		
Created By	AhamedrajaA, 9/9/2025, 12:05 AM	Modified By AhamedrajaA, 9/9/2025, 12:05 AM

PROFILES :

- A Profile in **Salesforce** is a collection of settings and permissions that define user access to objects, fields, tabs, apps, and other features.
- There are Standard Profiles (predefined, non-deletable) and Custom Profiles (user defined, deletable if unused).

Gold Smith Profile Created :

Clone Profile

You must select an existing profile to clone from.

Existing Profile	System Administrator
User License	Salesforce
Profile Name	Gold Smith

Worker Profile Created :

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

- Search Bar:** Search Setup
- Header:** SETUP Profiles
- Left Navigation:** Users, Profiles (selected)
- Message:** Didn't find what you're looking for? Try using Global Search.
- Profile Detail:**
 - Name:** Worker
 - User License:** Salesforce Platform
 - Description:** (empty)
 - Created By:** Ahamedraja_A, 9/9/2025, 2:07 AM
 - Modified By:** Ahamedraja_A, 9/9/2025, 2:33 AM
- Page Layouts:**

Standard Object Layouts	Global	Lead
Email Application	Not Assigned [View Assignment]	Location Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Location Group Location Layout [View Assignment]
Account	Account Layout [View Assignment]	Location Group Assignment Location Group Assignment Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	Object Milestone Object Milestone Layout

ROLES:

- A **Role** in Salesforce defines record-level visibility and determines what data a user can see within the organization.
- It helps differentiate users based on their **position** in the hierarchy, ensuring proper data access.

Created Gold Smith Role:

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar is open, showing 'Users' expanded, with 'Roles' selected. The main content area is titled 'Role Edit' for 'Gold Smith'. It contains fields for 'Label' (set to 'Gold Smith'), 'Role Name' (set to 'Gold_Smith'), and 'This role reports to' (set to 'CEO'). There is also a field 'Role Name as displayed on reports' which is also set to 'Gold Smith'. At the bottom of the screen are 'Save', 'Save & New', and 'Cancel' buttons.

Created One More Role As Worker Which Reports To Gold Smith :

The screenshot shows the 'Creating the Role Hierarchy' page in the Salesforce Setup interface. The left sidebar shows 'Users' expanded with 'Roles' selected. The main content area displays a hierarchical tree of roles under 'Your Organization's Role Hierarchy'. The tree starts with 'Government arts and science college avinashi', which has several child nodes: 'CEO', 'CFO', 'COO', 'Gold Smith', 'SVP.Customer Service & Support', 'SVP.Human Resources', 'SVP.Sales & Marketing', 'VP.International Sales', and 'VP.Marketing'. Each node has 'Edit', 'Del', and 'Assign' buttons next to it. A 'Show in tree view' button is located in the top right corner of the hierarchy area.

USERS :

A Salesforce user is anyone who logs in with a unique user account. Each account includes details like username, email, license, profile, and optionally a role. The user's account settings control access to features and records.

Created User - (Gold Smith)

The screenshot shows the Salesforce Setup interface. The left sidebar is collapsed, and the main area displays the 'Users' setup page. A user record for 'Niklaus Mikaelson' is selected. The 'User Detail' section shows the following information:

Field	Value	Role
Name	Niklaus Mikaelson	Gold Smith
Alias	nmika	Salesforce
Email	ahr007a@gmail.com [Verify]	Gold Smith
Username	ahr007a@gmail.com	Active
Nickname	ahr	Marketing User
Title		Offline User
Company		Knowledge User
Department		Flow User
Division		Service Cloud User
Address		Site.com Contributor User
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User
Locale	English (United States)	WDC User
Language	English	Mobile Push Registrations
Delegated Approver		Data.com User Type
Manager		Accessibility Mode (Classic Only)
Receive Approval Request	Only if I am an approver	Debug Mode

Created User – (Worker)

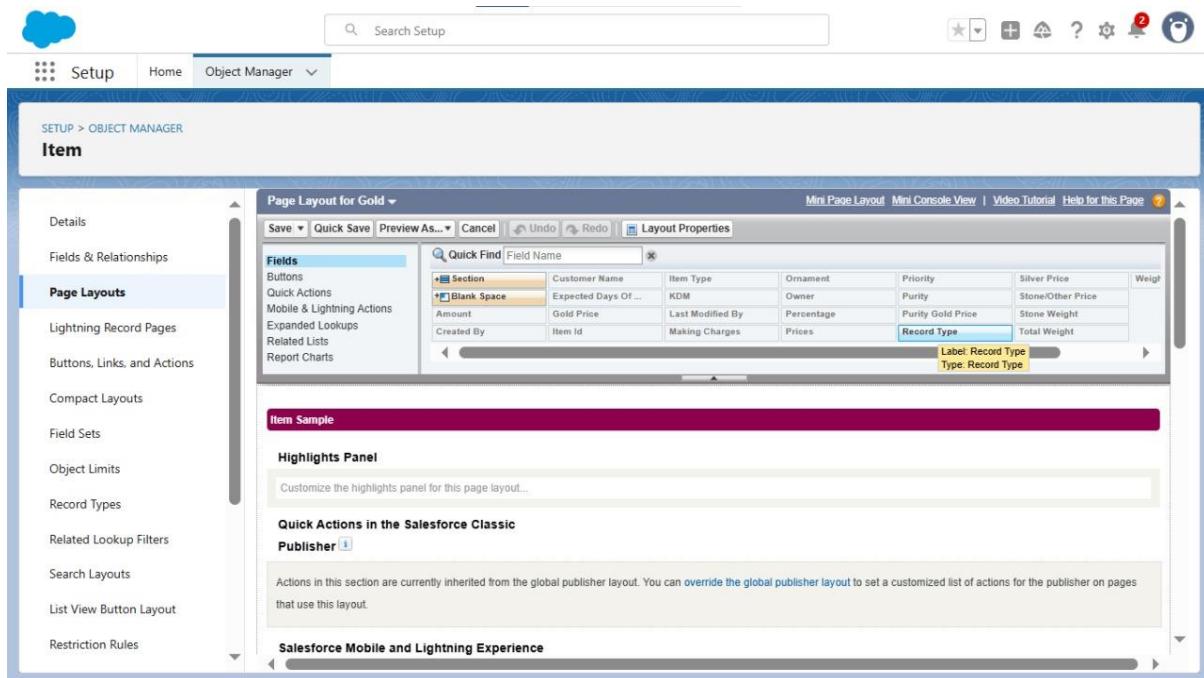
The screenshot shows the Salesforce Setup interface. The left sidebar is collapsed, and the main area displays the 'Users' setup page. A user record for 'Kol Mikaelson' is selected. The 'User Detail' section shows the following information:

Field	Value	Role
Name	Kol Mikaelson	Worker
Alias	kmika	Salesforce Platform
Email	kari@raja1511@gmail.com [Verify]	Worker
Username	kari@raja1511@gmail.com	Active
Nickname	kargi	Marketing User
Title		Offline User
Company		Knowledge User
Department		Flow User
Division		Service Cloud User
Address		Site.com Contributor User
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User
Locale	English (United States)	WDC User
Language	English	Mobile Push Registrations
Delegated Approver		Data.com User Type
Manager		Accessibility Mode (Classic Only)
Receive Approval Request	Only if I am an approver	Debug Mode

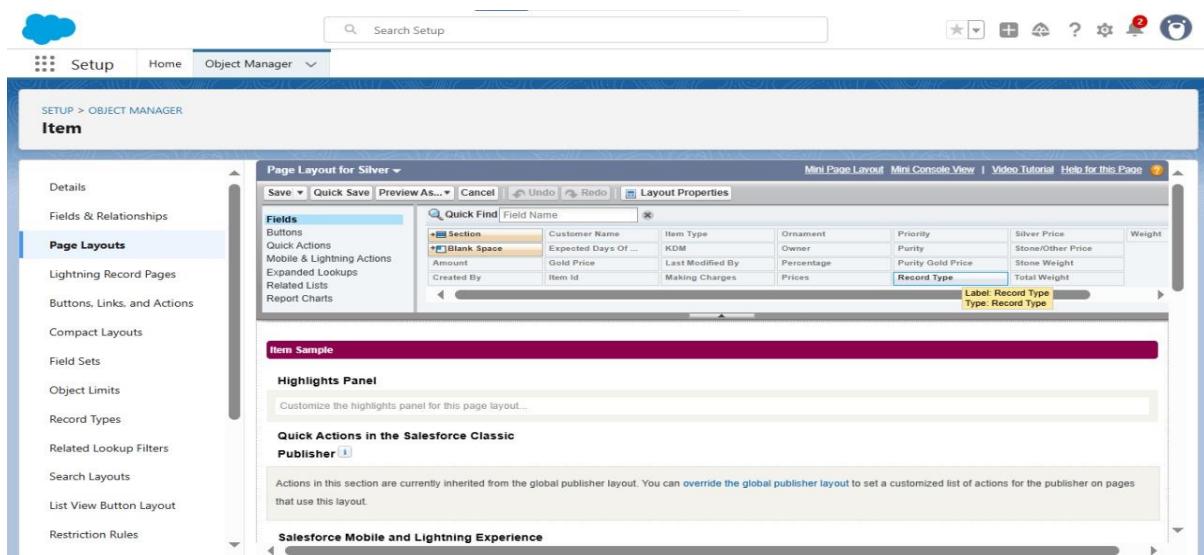
PAGE LAYOUT :

- Page Layouts in Salesforce let you customize the design of record detail and edit pages.
- They control the placement of fields, related lists, and custom links for both standard and custom objects.
- Use case: To make clumsy pages more organized and visually pleasant by grouping related information into sections.

Created a Gold Page layout :



Created a Silver Page layout :



SETUP > OBJECT MANAGER
Item

Page Layouts
3 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Item Layout	Ahamedraja A. 9/8/2025, 10:15 PM	Ahamedraja A. 9/8/2025, 11:47 PM
Page Layout for Gold	Ahamedraja A. 9/9/2025, 1:53 AM	Ahamedraja A. 9/9/2025, 1:57 AM
Page Layout for Silver	Ahamedraja A. 9/9/2025, 1:58 AM	Ahamedraja A. 9/9/2025, 1:59 AM

RECORD TYPE :

- Record Types in Salesforce group records of the same object to offer different page layouts, fields, and picklist values.
- They help tailor user experience based on different business processes within the same object.
- Use case: Create separate forms for Gold and Silver records to simplify data entry based on work mode.

created a Record Type - (Gold)

SETUP > OBJECT MANAGER
Item

Record Type
Gold
← 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.

Record Type Label	Gold	Edit
Record Type Name	Gold	Active ✓
Namespace Prefix		
Description	Gold items information	
Created By	Ahamedraja A. 9/9/2025, 2:12 AM	Modified By Ahamedraja A. 9/9/2025, 2:12 AM

Picklists Available for Editing

Action	Field	Modified Date
Edit	Expected Days Of Return	9/9/2025, 2:12 AM
Edit	Item Type	9/9/2025, 2:12 AM
Edit	Priority	9/9/2025, 2:12 AM

SETUP > OBJECT MANAGER

Item

Record Type
Silver

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

Record Type Label	Silver	Active
Record Type Name	Silver	<input checked="" type="checkbox"/>
Namespace Prefix		
Description	Silver items information	
Created By	Ahmedraja_A	9/9/2025, 2:13 AM
Modified By	Ahmedraja_A	9/9/2025, 2:13 AM

Picklists Available for Editing

Action	Field	Modified Date
Edit	Expected Days Of Return	9/9/2025, 2:13 AM
Edit	Item Type	9/9/2025, 2:13 AM
Edit	Priority	9/9/2025, 2:13 AM

PERMISSION SETS :

- Permission sets are collections of settings and permissions that grant users access to specific tools or features.
- Standard permission sets save time by providing predefined permissions tied to a permission set license.

Created a permission set :

SETUP

Permission Sets

On this page you can create, view, and manage permission sets.

Action	Permission Set Name	Description	License
<input type="checkbox"/>	Clone	ZeeEventPumpC2CPPermSet	Cloud Integration User
<input type="checkbox"/>	Clone	Use Enablement Programs	Enablement
<input type="checkbox"/>	Clone	Standard Einstein Activity Capture	Standard Einstein Activity Capture User
<input type="checkbox"/>	Clone	Slack Service User	Slack Service User
<input type="checkbox"/>	Clone	Shopper	Lets users run the flows for swarming with Service Cloud User
<input type="checkbox"/>	Del Clone	Set To Worker	Allow access to B2C Commerce features.
<input type="checkbox"/>	Clone	Service Cloud User	Commerce User
<input type="checkbox"/>	Clone	Seller-Focused Sales Mobile Experience	Denotes that the user is a Service Cloud user.
<input type="checkbox"/>	Clone	Segment Intelligence User	Use an experience that's tailored for sellers or buyers.
<input type="checkbox"/>	Clone	Security Center Integration User	View Segment Intelligence dashboard.
<input type="checkbox"/>	Clone	Cloud Integration User	Access Security Center for Integration
<input type="checkbox"/>	Clone	SaaS Indexing C2C User Perm	Allows the user to access entities indexed by Service Cloud Integration User
<input type="checkbox"/>	Clone	Salesforce Scheduler Greeter	Let users manage drop-in customers and customers.
<input type="checkbox"/>	Clone	Salesforce Pricing Run Time User	Salesforce Scheduler Greeter
<input type="checkbox"/>	Clone	Salesforce Pricing Manager	Allow read access for all Salesforce Pricing objects.

The screenshot shows the Salesforce Setup interface. The left sidebar includes sections for Hyperforce Assistant, Users, Permission Set Groups (with 'Permission Sets' selected), Apps (Mobile Apps, Salesforce, Mobile Builder for the Seller-Focused Experience, Feature Settings, Digital Experiences, Salesforce CMS, Settings, Functions, Sales, Accounts, Person Accounts), and Feature Settings. The main content area is titled 'Permission Sets' and shows the 'Set To Worker' permission set. It includes fields for Description, License, Session Activation Required, and Namespace Prefix. The 'API Name' is Set_To_Worker, 'Created By' is Ahamedraja A., and 'Last Modified By' is Ahamedraja A. The 'Permission Set Overview' section shows 0 permission set groups added. Below this is the 'Apps' section, which lists assigned apps, assigned connected apps, object settings, app permissions, apex class access, and visualforce page access.

TRIGGER :

- A trigger is Apex code that runs automatically before or after events like insert, update, or delete.
- It helps automate processes and customize behavior when records change in Salesforce.
- Use case: Update the Paid Amount on the Billing object based on the Paying Amount during insert and update actions.

Created a Trigger Handler class :

The screenshot shows the Salesforce Developer Console with the file 'UpdatePaidAmountTriggerHandler.apxc' open. The code defines a trigger handler for the Billing__c object:

```

1  public class UpdatePaidAmountTriggerHandler {
2    public static void handleBeforeInsert(List<Billing__c> newBillings) {
3      for (Billing__c billing : newBillings) {
4        billing.Paid_Amount__c = billing.Paying_Amount__c;
5      }
6    }
7  }
8
9
10
11
12
13
14
15
16
17
18
19
20

```

An open modal window titled 'Open' shows the 'UpdatePaidAmountTriggerHandler' entity in the repository. The table has columns for Entity Type, Entities, and Related. The Entities row shows the name 'UpdatePaidAmountTrig...' with a red arrow pointing to it. The Related section lists associations like '← UpdatePaid... ApexTrigger Referenced ...', 'Paid Amount CustomField...', 'Paying Amo... CustomField...', '← Billing__c SObject References', and '← Billing__c SObject References'.

USER ADOPTION :

- User Adoption involves managing users effectively to ensure they utilize Salesforce efficiently.
- As an admin, you handle tasks like creating users, setting permissions, and configuring data access.

Created a Record (Jewel Customer) :

	Customer name
1	Gokul
2	Vinoth
3	Anandakannan S.
4	Hari sanjay
5	Mathan
6	Santhosh kumar
7	Arjun
8	Jeeva
9	Kargil Raja
10	mahesh

View a Record (Jewel Customer) :

Customer name	Owner
Kargil Raja	Ahamedraja A
City	
Thirupur	
Phone	(978) 989-1524
Email	kargilraja1511@gmail.com
State	Tamil Nadu
Street	Tekkalur
Country	India
Zip/Postal code	641601
Created By	Ahamedraja A, 9/9/2025, 7:32 AM
Last Modified By	Ahamedraja A, 9/9/2025, 7:32 AM

Deleted a Record(Jewel Customer) :

BEFORE DELETED :

Jewellery Inventory ... Jewel Customers

10 items • Updated 5 minutes ago

	Customer name
1	Gokul
2	Vinoth
3	Anandakannan S
4	Hari sanjay
5	Mathan
6	Santhosh kumar
7	Arjun
8	Jeeva
9	Kargil Raja
10	mahesh

javascript:void(0);

AFTER DELETED :

Jewellery Inventory ... Jewel Customers

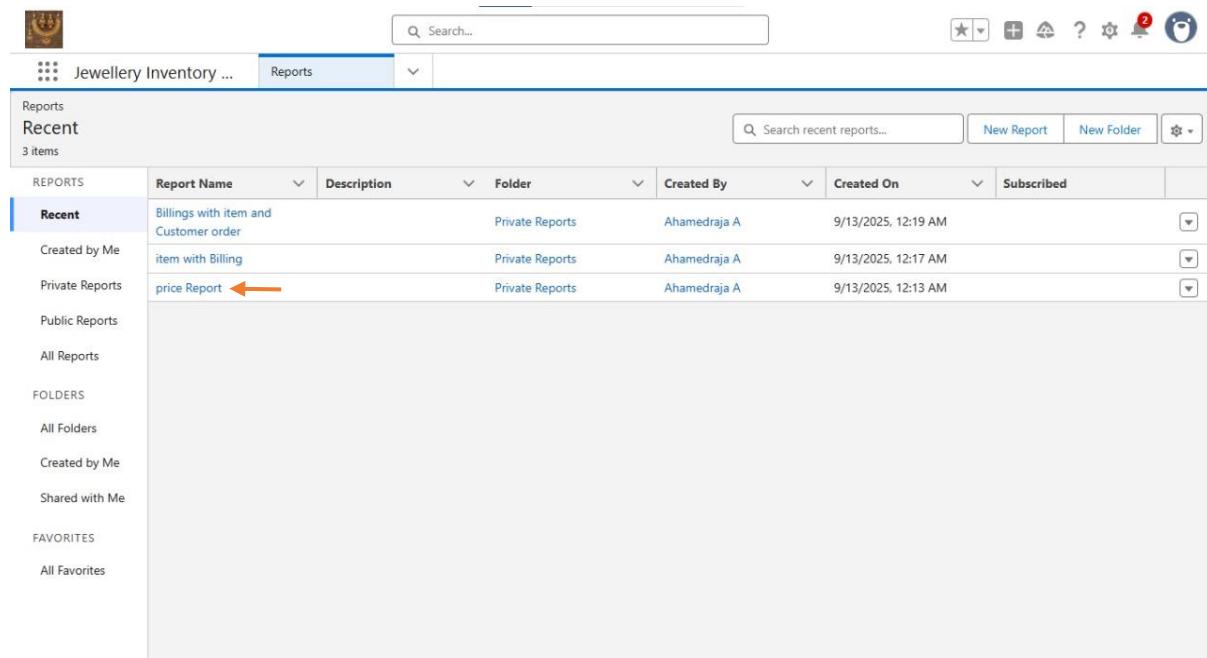
9 items • Updated a few seconds ago

	Customer name
1	Kargil Raja
2	Gokul
3	Vinoth
4	Anandakannan S
5	Hari sanjay
6	Mathan
7	Santhosh kumar
8	Arjun
9	mahesh

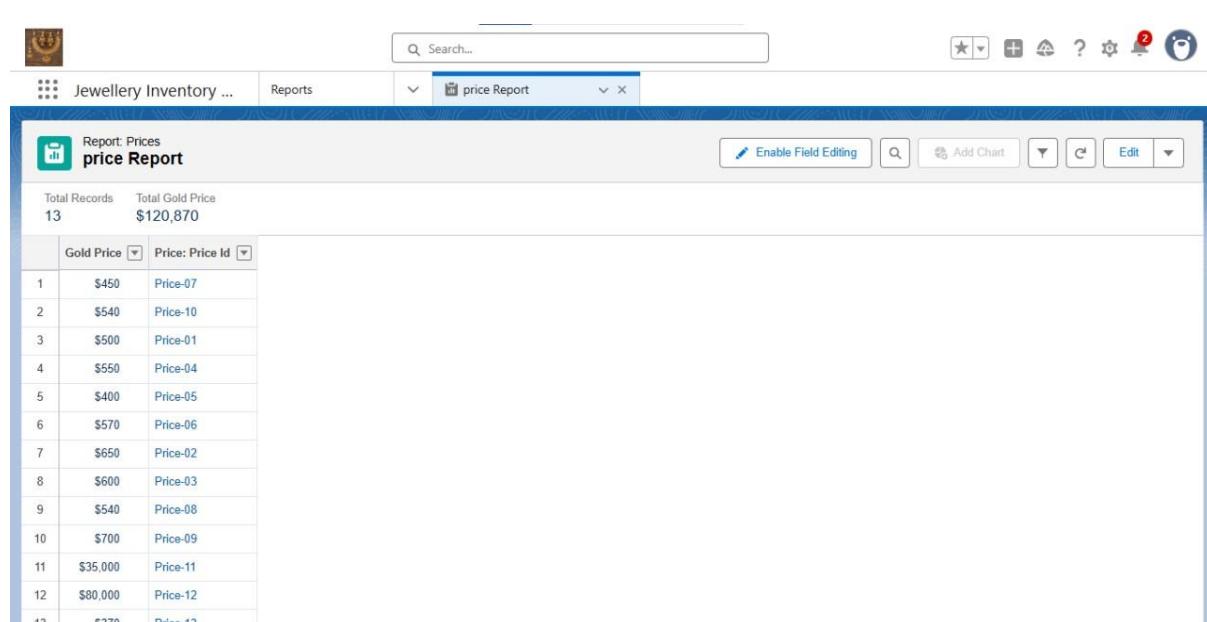
REPORTS :

- Reports in Salesforce help you view and analyze data in various formats like Tabular, Summary, Matrix, and Joined.
- They allow you to organize and share key insights for better decision-making.
- Use case: Create reports on Gold Items, Silver Items, Customer Orders, and Billings to give Gold Smith a clear business overview.

Created Price Reports:



The screenshot shows the Salesforce Reports page. On the left, there's a sidebar with categories: Reports, Recent (which has 3 items), 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 area displays a table of recent reports. One row, 'price Report', is highlighted with a red arrow pointing to it. The table columns are: Report Name, Description, Folder, Created By, Created On, and Subscribed. The 'price Report' row contains: Billings with item and Customer order, item with Billing, price Report, Private Reports, Ahamedraja A, and 9/13/2025, 12:13 AM.



The screenshot shows the detail view of the 'price Report'. At the top, it says 'Report: Prices price Report'. Below that, it shows 'Total Records: 13' and 'Total Gold Price: \$120,870'. The main area is a table with two columns: 'Gold Price' and 'Price: Price Id'. The table rows are numbered 1 to 13. A red arrow points to the first row (Gold Price: \$450, Price: Price-07).

	Gold Price	Price: Price Id
1	\$450	Price-07
2	\$540	Price-10
3	\$500	Price-01
4	\$550	Price-04
5	\$400	Price-05
6	\$570	Price-06
7	\$650	Price-02
8	\$600	Price-03
9	\$540	Price-08
10	\$700	Price-09
11	\$35,000	Price-11
12	\$80,000	Price-12
13	\$370	Price-13

Created Item With Billings Report :

Jewellery Inventory ... Billings

Billings Recently Viewed

10 items • Updated a few seconds ago

	Billing Id
1	Billing-02
2	Billing-01
3	Billing-10
4	Billing-09
5	Billing-08
6	Billing-07
7	Billing-06
8	Billing-05
9	Billing-04
10	Billing-03

Created Billing With Item And Customer Order Report:

Jewellery Inventory ... Items

Items Recently Viewed

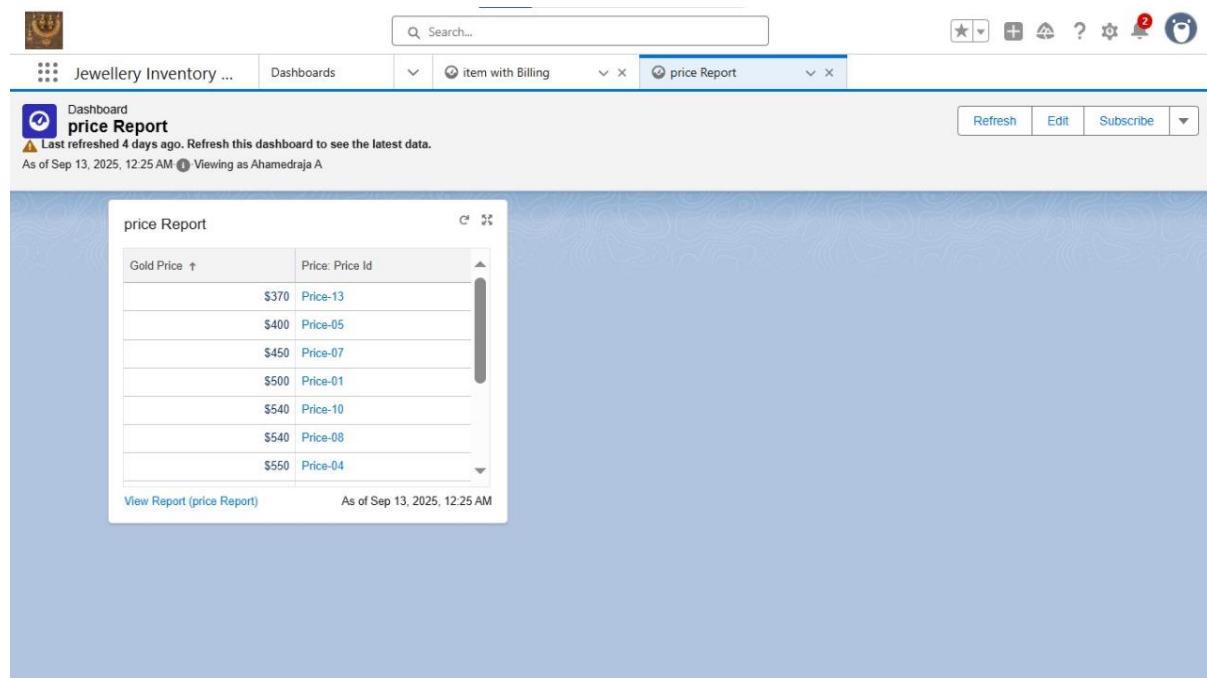
10 items • Updated a few seconds ago

	Item Id
1	Item-07
2	Item-08
3	Item-09
4	Item-10
5	Item-01
6	Item-02
7	Item-03
8	Item-04
9	Item-05
10	Item-06

DASHBOARDS :

- Dashboards in Salesforce provide visual representations of report data to help track trends and performance in real time.
- They make it easier for users to interpret data quickly using charts, graphs, and metrics.
- Use case: As an Admin, you create dashboards for GoldSmith to easily view key reports without searching through raw data.

Created Dashboard 1 (price Report) :



The screenshot shows a Salesforce dashboard titled "Dashboard price Report". The dashboard header includes a search bar, a star icon, a refresh icon, and other navigation options. Below the header, a message indicates the dashboard was last refreshed 4 days ago and prompts to refresh for the latest data. It also shows the user is viewing as "Ahamedraja A" and provides a timestamp of "As of Sep 13, 2025, 12:25 AM".

The main content area displays a table titled "price Report" with two columns: "Gold Price" and "Price: Price Id". The data rows are:

Gold Price	Price: Price Id
\$370	Price-13
\$400	Price-05
\$450	Price-07
\$500	Price-01
\$540	Price-10
\$540	Price-08
\$550	Price-04

At the bottom of the dashboard, there are links for "View Report (price Report)" and "As of Sep 13, 2025, 12:25 AM".

Created Dashboard 2 (Item With Billing) :

The screenshot shows a dashboard titled "item with Billing". At the top, there is a search bar and several navigation icons. Below the title, a message says "Last refreshed 4 days ago. Refresh this dashboard to see the latest data." and "As of Sep 13, 2025, 12:27 AM Viewing as Ahamedraja A". The main content area contains a table with two columns: "Billing: Billing Id" and "Item: Item Id". The data in the table is as follows:

Billing: Billing Id	Item: Item Id
Billing-01	Item-01
Billing-02	Item-02
Billing-03	Item-03
Billing-04	Item-04
Billing-05	Item-05
Billing-06	Item-06
Billing-07	Item-07

At the bottom of the table, there are links "View Report (item with Billing)" and "As of Sep 13, 2025, 12:27 AM".

Created Dashboard 3 (Billing with item and Customer order) :

The screenshot shows a dashboard titled "Billings with item and Customer order". At the top, there is a search bar and several navigation icons. Below the title, a message says "Last refreshed 4 days ago. Refresh this dashboard to see the latest data." and "As of Sep 13, 2025, 12:33 AM Viewing as Ahamedraja A". The main content area contains a table with two columns: "Item: Item Id" and "Customer Order: Customer Order Id". The data in the table is as follows:

Item: Item Id	Customer Order: Customer Order Id
Item-01	Customer Order-01
Item-02	Customer Order-02
Item-03	Customer Order-03
Item-04	Customer Order-04
Item-05	Customer Order-05
Item-06	Customer Order-06
Item-07	Customer Order-07

At the bottom of the table, there are links "View Report (Billings with item an..." and "As of Sep 13, 2025, 12:33 AM".

FLOW :

- Flows in Salesforce are visual tools used to automate business processes without writing code.
- They guide users through steps, collect/update data, and handle tasks like record updates or email triggers.
- Use case: Use Flows to streamline complex processes through a drag-and-drop interface for efficient automation.

Created a Flow :

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with a search bar and sections for Apps (Lightning Bolt, Einstein, Process Automation, Workflow Actions), Home, Object Manager, and more. The main area is titled 'Flows' and shows a list of 'Flow Definitions'. The list includes items like 'Authentication Provider Use...', 'Basic Approval Request', 'Billing Alert Flow', 'Book Appointment from Inv...', 'Cancel Item Flow', etc. Each row has columns for 'Flow Label', 'Process Type', 'Package State', and 'Last Modified'. The 'Billing Alert Flow' is highlighted with a blue arrow pointing to it.

The screenshot shows the Flow Builder interface for a flow named 'Billing Alert Flow - V1'. The top bar includes the flow name, status (Active), and buttons for Run, Debug, View Tests, Save As New Version, Save, and Deactivate. The left side is the 'Toolbox' with categories for Interaction, Logic, and Data. The main area shows a flow diagram with a start step ('Action notice') connected to a 'Run immediately' connector, which then leads to a 'Start Record-Triggered Flow' step. The right side shows the configuration for this start step, specifying 'Object: Billing' and 'Trigger: A record is created or updated'. It also includes options for 'Edit', 'Add Scheduled Paths (Optional)', and 'Open Flow Trigger Explorer for Billing'.

RESULTS :

Output Screenshots :

- **Tabs For Billings,Customer Orders,Items,Jewel Customers,Prices**

The screenshot shows the Salesforce Setup interface under the 'Tabs' section. It displays a list of custom object tabs:

Action	Label	Tab Style	Description
Edit Del	Billings	Balls	
Edit Del	Customer Orders	Balls	
Edit Del	Items	Boat	
Edit Del	Jewel Customers	Apple	
Edit Del	Prices	Balls	

Below this, there are sections for 'Web Tabs' and 'Visualforce Tabs', both of which currently have no defined tabs.

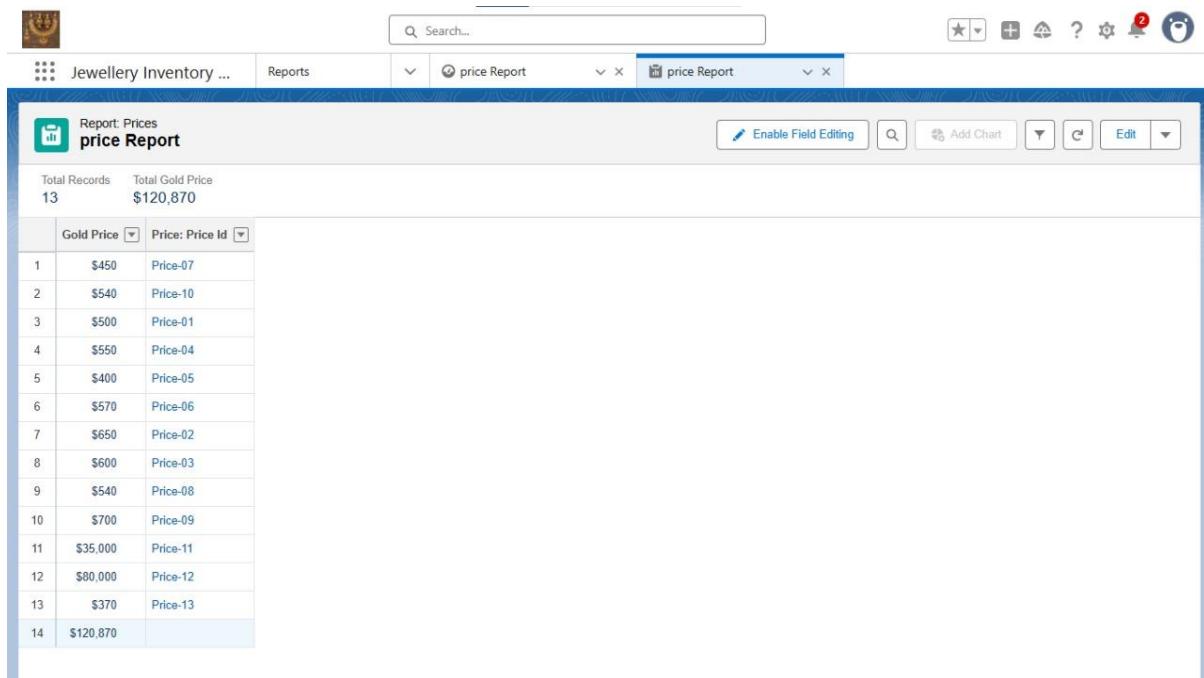
APP DASHBOARD :

The screenshot shows the Salesforce App Dashboard. A 'price Report' card is displayed, showing a table of price data:

Gold Price ↑	Price: Price Id
\$370	Price-13
\$400	Price-05
\$450	Price-07
\$500	Price-01
\$540	Price-10
\$540	Price-08
\$550	Price-04

At the bottom of the card, it says 'View Report (price Report)' and 'As of Sep 13, 2025, 12:25 AM'. The dashboard also includes a header with 'Jewellery Inventory ...', 'Dashboards', and a refresh button.

JEWEL CUSTOMER RECORD PAGE :



The screenshot shows a Salesforce report interface. At the top, there's a navigation bar with icons for home, search, reports, and various system settings. Below the bar, the title is "Report: Prices price Report". It displays "Total Records: 13" and "Total Gold Price: \$120,870". The main content is a table with two columns: "Gold Price" and "Price: Price Id". The data rows are as follows:

	Gold Price	Price: Price Id
1	\$450	Price-07
2	\$540	Price-10
3	\$500	Price-01
4	\$550	Price-04
5	\$400	Price-05
6	\$570	Price-06
7	\$650	Price-02
8	\$600	Price-03
9	\$540	Price-08
10	\$700	Price-09
11	\$35,000	Price-11
12	\$80,000	Price-12
13	\$370	Price-13
14	\$120,870	

ADVANTAGES & DISADVANTAGES :

ADVANTAGES :

- Tracks metal type, weight, price, and quantity per item.
- Eliminates manual data entry errors
- Stores customer details and purchase history
- Helps managers make data-driven decisions
- Reduces mistakes using Validation Rules and Field Dependencies
- Customized Lightning Pages for easy data entry
- Reduces training time for new staff
- Easy to add new jewellery types, stores, or processes in future
- Uses Salesforce profiles and permission sets
- Ensures that only authorized users can view or modify sensitive data.

DISADVANTAGES :

- The app works only within Salesforce; integration with external platforms needs custom APIs or third party tools.
- No support for scanning barcodes or using RFID for physical inventory checks.
- Needs improvement for complex inventory scenarios. Sales Order confirms but actual payment collection is manual or outside the system.
- New customer records are entered manually.
- All users may see the same dashboard view.
- Requires internet and Salesforce login.
- No offline access for stock audits or mobile order entries in remote areas.

CONCLUSION :

The Jewellery CRM application effectively streamlines inventory and sales processes using Salesforce tools like flows, validation rules. It improves data accuracy, automates order management, and enhances customer communication. The system offers a user-friendly interface and real-time reporting for better decision-making. This project demonstrates strong practical knowledge of Salesforce development. While effective, future enhancements like payment integration and barcode scanning can further improve its functionality. Overall, it delivers a smart solution tailored for jewellery business needs.