# SALESFORCE DEVELOPMENT AND CUSTOMIZATION

| Date | 05 November 2025 |
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| Team Id | NM2025TMID01192 |
| Project Name | CRM Application for Jewel Management |

This phase covers the design, development, and customization of the Jewel Management CRM using Salesforce tools. It focuses on configuring objects, fields, automation flows, triggers, dashboards, and the Lightning App interface to deliver a complete, role-based CRM system.

The Salesforce environment was designed for scalability, automation, and security, enabling jewelry store owners and staff to efficiently manage customers, jewelry inventory, orders, and payments within a unified platform.
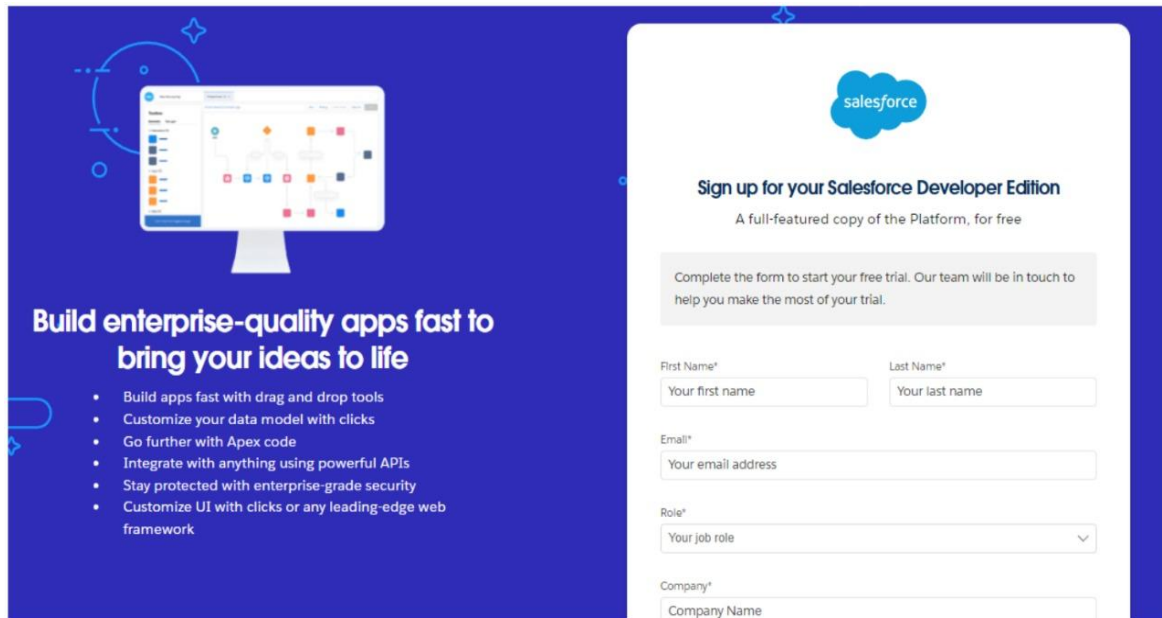
## Environment Setup and Configuration

- A Salesforce Developer Org was created to configure and test all CRM modules before deployment to production.

- This ensured data safety during development and allowed smooth iteration of configurations.

**Setup Steps:**

- Created a custom Lightning App named "Jewel Management CRM".

- Added navigation tabs: Customer, Jewelry Item, Orders, Payments, Reports, and Dashboards.

- Configured User Profiles (Admin, Gold Smith, Worker, Manager) and assigned

role hierarchies.

- Enabled Login Access Policies, Record Ownership, and Organization-Wide Defaults (OWD) for data security.



## Custom Objects, Fields, and Relationships

The system relies on Salesforce Custom Objects to structure and link jewelry-related business data.

## Custom Objects and Sample Fields:

1. Customer

2. Name, Email, Phone, Address, Loyalty Points, Total Orders

3. Jewelry Item

4. Item Name, Type, Purity, Weight, Price, Stock Quantity, Status

5. Order

6. Order ID, Customer (Lookup), Order Date, Total Amount, Payment Status

7. Payment

8. Payment ID, Order (Lookup), Amount, Payment Mode, Transaction ID, Payment Date

## Relationships:

One Customer → Many Orders

One Order → Many Payments

One Order → Many Jewelry Items (via Junction Object)

These relationships form the core data model, enabling seamless tracking and reporting across all business entities.