

CRM Application for Jewel Management - (Admin)

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(1) Project Overview:-

A “CRM Application for Jewel Management - (Admin)” aims to achieve several key objectives that ultimately contribute to the growth and efficiency of a jewelry business. The system specifically designed for jewelry business, allowing them To effectively track customer interactions, manage sales leads, and personalize marketing efforts optimize customer relationship and boost sales within the jewelry industry.

- Capture detailed customer information including demographics, purchase history, preferred jewelry types, special occasions, and contact details
- Store and update customer data in real time to maintain accuracy

The purpose of a CRM (Customer Relationship Management) system is to help businesses manage and improve their interactions with customers and potential customers. This overarching goal breaks down into several key objectives.

CRM, or Customer Relationship Management, is a multifaceted concept that's essential for modern businesses. It's not just a piece of software it's a strategic approach to how a company interacts with its customers.

The relationship between CRM (Customer Relationship Management) and CLV (Customer Lifetime Value) is very strong. CRM systems provide the tools and data necessary to effectively calculate, track, and ultimately increase CLV.

(2) Objectives :-

Creating an object in Salesforce organisation is essential for efficient data management and process automation. By defining custom objects, businesses can structure and store data specific to their needs, enabling streamlined workflows, personalised reporting, and enhanced user experiences. Objects serve as the foundation for organising and leveraging critical information within Salesforce.

The TWO main objectives of a CRM

- ❖ Standard Objects
- ❖ Custom Objects

Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

(3) Salesforce Key Features and Concepts Utilized:-

Salesforce is a cloud-based CRM platform that provides various features and concepts to help businesses manage customer relationships, sales, and operations. Here are some key features and concepts utilized in Salesforce

Key features of Salesforce CRM include: contact management, lead management, opportunity management, sales forecasting, reporting and dashboards, automation through workflows, collaboration tools, cloud-based access, mobile accessibility, AI integration, campaign management, and a single source of truth for customer data, allowing businesses to track and manage customer interactions across all channels effectively; with core concepts like lead qualification, opportunity stages, and customer lifecycle management central to the platform.

- ★ We used the following

★ **Objects :-**

- ❖ Jewel Customer
- ❖ Items
- ❖ Billing
- ❖ Prices
- ❖ Customer order

★ We used **Tabs** such as

- ❖ Jewel Customer Tab
- ❖ Item Tab .. Etc.

★ We Created a Lightning App :- **Jewellery Inventory System**

➤ ***We Created Fields such as :-***

- ◆ ***Lookup Relationship***
- ◆ ***Master-Detailed Relationship***
- ◆ ***Text, Phone, Email Fields in Jewel Customer Object***
- ◆ ***Number Picklist Fields in Item Object***
- ◆ ***Currency Fields in Price Object***
- ◆ ***Formula Field (cross object)in Item Object***
- ◆ ***Also Created some other Fields.***

★Schema Builder:-

The schema builder is a simple graphical interface for visualizing and editing the data model of your Org. The schema builder can get all fields from an Object, perform basic impact analysis of changes to an Object, and show all dependencies on an Object.

→ We Entered object as :-

- ❖ Jewel Customer
- ❖ Items
- ❖ Customer order
- ❖ Prices
- ❖ Billing in Schema Builders

★Field Dependencies:-

Field dependency can refer to a cognitive style, a relationship between fields in a dialog, or a dependency injection technique. Field Dependencies are used to create relationships between fields within an object. They allow you to control the visibility and availability of fields based on the values selected in other fields.

We created New Field Dependencies, controlling as "Priority"& Depending Field as "Expecting Days of Return".

★ Validation Rules :-

A validation rule is one way to restrict input in a table field or a control on a form. Validation text lets you provide a message to help users who input data that is not valid.

Created the validation rule for Postal Code field in Jewel Customer object.

★ Profiles:

We Created 2 Profiles:

- **Gold Smith profile**
- **Worker profile**

★ Roles:-

Salesforce roles are record-level access controls that define what data a user can see in Salesforce. roles can be used to determine the visibility access of the user and the data they can access in your Salesforce CRM organization.

Added Goldsmith role in CEO Role & Added Worker Role which reports to Goldsmith.

★ Users: -

A user in Salesforce is anyone who logs in to the platform, including employees, customers, partners, and automated users.

- ★ **Niklaus Mikaelson in Goldsmith Profile**
- ★ **Kol Mikaelson in Worker Profile**
- ★ **2 more Users in Worker Profile**

★ Page Layouts: -

Page layouts control the layout and organization of buttons, fields, s-controls, Visualforce, custom links, and related lists on object record pages. They also help determine which fields are visible, read only,

and required. Use page layouts to customize the content of record pages for your users.

Created 2 Page layouts in Item object named as: -

- ❖ “Page Layout for Gold”
- ❖ “Page layout for Silver”

★ Record Type: -

Record Types are a way of grouping many records of one type for that object. These can be applied to any standard or custom object, and allow you to have a different page layout, fields, required fields, and picklist values.

Created Record Types in Item Object labeled as Gold & Silver.

★ Permission sets: -

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' function.

We Created New Permission Sets & Labeled it as “Per to Worker ” And in Item Object we enabled Gold & Silver object permission we selected “Read, Edit & Create ”. We added Assignments which we used under Worker Profile users.

★ User Adoption: -

User adoption, or onboarding, is the process of customers or new users getting used to a product or service and then deciding to keep using it because it makes a task or goal.

In Jewelry Inventory System we created Jewel Customers under Jewel Customer tab. We created some Records under “Item, Prices, Customer orders & Billing”.

★ Reports: -

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

We created 3 reports:

- **Prices Report**
- **Billings with item and Customer order Report.**
- **Item with Billings Report**

★ Dashboards:

We created dashboards under “Item with Billings Report”, “Billings with item and Customer order Report”, “Prices Report”.

★ Flows:

Flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens

We selected Record Triggered flow and “Selected the Object as a “Billing” in the Drop-down list. Selected the Trigger Flow where as “A record is Created or Updated”. Selected the Optimize the flow for: “Actions and Related Records” .

(4) Detailed steps to Solution Design: -

We created objects:

- ◆ Jewel customer
- ◆ Item
- ◆ Billings
- ◆ Prices
- ◆ Customer Order

WhatsApp | Project Title CRM.docx - Microsoft Word | Smartinternz | Items | Salesforce

<https://ssgsdegreecollege-8e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS000002yl4X/FieldsAndRelationships/view>

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Items

Details		Fields & Relationships				
		24 Items, Sorted by Field Label				
		FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Fields & Relationships		Amount	Amount_c	Formula (Currency)		
Page Layouts		Billing with item and Customer order	Billing_with_item_and_Customer_order_c	Lookup(Items)	✓	
Lightning Record Pages		Created By	CreatedBy	Lookup(User)		
Buttons, Links, and Actions		Customer Name	Customer_Name_c	Lookup(Jewel Customer)	✓	
Compact Layouts		Expected Days Of Return	Expected_Days_Of_Return_c	Picklist	Priority	
Field Sets		Gold Price	Gold_Price_c	Formula (Currency)		
Object Limits		Item	Item_c	Picklist		
Record Types						
Related Lookup Filters						
Search Layouts						



WhatsApp web - Search | WhatsApp | Completion Certificate | SkillsBuild | Jewel Customer | Salesforce

<https://ssgsdegreecollege-8e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS000002yktF/FieldsAndRelationships/view>

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Jewel Customer

Details		Fields & Relationships				
		22 Items, Sorted by Field Label				
Fields & Relationships		FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts		City	City_c	Text(20)		
Lightning Record Pages		Country	Country_c	Text(18)		
Buttons, Links, and Actions		Created By	CreatedBy	Lookup(User)		
Compact Layouts		Customer	Customer_c	Lookup(Jewel Customer)	✓	
Field Sets		Customer Name	Customer_Name_c	Lookup(Jewel Customer)	✓	
Object Limits		Customer Name	Name	Text(80)	✓	
Record Types		Data type	Data_type_c	Text(20)		
Related Lookup Filters						
Search Layouts						



The screenshot shows the Salesforce Object Manager Fields & Relationships page for the Billing object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, Buttons, etc. The main area displays a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Bi Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Gold/Silver Price	Gold_Silver_Price__c	Formula (Currency)		
Item	Item__c	Lookup(Items)		✓
KDM Charge	KDM_Charge__c	Formula (Currency)		
Last Modified By	LastModifiedById	Lookup(User)		

We used to 2 Profiles: -

- *Gold Smith Profile*
- *Worker profile*

Salesforce Setup Page - Profiles

Profile Edit: worker

Set the permissions and page layouts for this profile.

Profile Edit Form:

Name	worker	Save	Save & New	Cancel
User License	Salesforce Platform	Custom Profile <input checked="" type="checkbox"/>		
Description				

Custom App Settings:

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>
Jewelry Inventory System (Jewelry_Inventory_System)	<input type="checkbox"/>	<input type="radio"/>			

Service Provider Access:

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	My Service Journey (standard__MSJApp)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>

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Windows Taskbar:

- Type here to search
- Clapboard icon
- File Explorer icon
- Microsoft Edge icon
- Google Chrome icon
- File icon
- 18:17 02-03-2025

Salesforce Setup Page - Profiles

Profile Edit: Gold Smith

Set the permissions and page layouts for this profile.

Profile Edit Form:

Name	Gold Smith	Save	Save & New	Cancel
User License	Salesforce	Custom Profile <input checked="" type="checkbox"/>		
Description				

Custom App Settings:

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	My Service Journey (standard__MSJApp)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>

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Windows Taskbar:

- Type here to search
- Clapboard icon
- File Explorer icon
- Microsoft Edge icon
- Google Chrome icon
- File icon
- 18:19 02-03-2025

Lighting App: -

The screenshot shows a web browser window with multiple tabs open. The active tab is a Lightning App titled "Jewelry Inventory S..." under "Jewel Customers". The page displays a list of recently viewed customers, sorted by Customer Name. The list includes:

Customer Name
Nazma
Dharani
Mikaelson
Anitha

At the bottom of the browser window, the taskbar shows various pinned icons and the system tray indicates the date and time as 02-03-2025 at 18:24.

Roles: -

Screenshot of the Salesforce Setup interface showing the Roles page for the 'Gold Smith' role.

Role Detail:

Label	Value	Role Name	Value
This role reports to	SVP_Sales & Marketing	Role Name as displayed on reports	Gold_Smith
Modified By	Kunuba Sirisha Team	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

Users in Gold Smith Role:

Action	Full Name	Alias	Username	Active
Edit	Niklaus Mikaelson	nmika	sirisha@123@gmail.com	<input checked="" type="checkbox"/>

Screenshot of the Salesforce Setup interface showing the Roles page for creating a role hierarchy.

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.

Your Organization's Role Hierarchy

SSGS degree college	
<input type="button" value="Add Role"/>	CEO Edit Del Assign
<input type="button" value="Add Role"/>	CFO Edit Del Assign
<input type="button" value="Add Role"/>	COO Edit Del Assign
<input type="button" value="Add Role"/>	SVP,Customer Service & Support Edit Del Assign
<input type="button" value="Add Role"/>	Customer Support, International Edit Del Assign
<input type="button" value="Add Role"/>	Customer Support, North America Edit Del Assign
<input type="button" value="Add Role"/>	Installation & Repair Services Edit Del Assign
<input type="button" value="Add Role"/>	CVD Human Resources Edit Del Assign

Users: -

- Niklaus Mikaelson
- Kol Mikaelson

User Edit
Niklaus Mikaelson

General Information

First Name	Niklaus	Role	Gold Smith
Last Name	Mikaelson	User License	Salesforce
Alias	nmika	Profile	Gold Smith
Email	mugithiharani@gmail.com	Active	<input checked="" type="checkbox"/>
Username	sirisha@123gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User1740557462175510852	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>

User Detail
Kol Mikaelson

User Profile Help for this Page

User Detail

Name	Kol Mikaelson	Role	Worker
Alias	kmika	User License	Salesforce Platform
Email	mugithiharani@gmail.com [Verify]	Profile	worker profile
Username	sirisha@111gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17405582722813922863	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	India	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View

We created 2-page layouts:

Page Layouts for Gold & Silver

The screenshot shows the Salesforce Setup interface for creating a page layout. The left sidebar has the 'Page Layouts' tab selected. The main area displays a grid of fields for the 'Items' object, including 'Section', 'Created By', 'Item', 'Making Charges', 'Prices', 'Record Type', and 'Total Weight'. There is also a 'Blank Space' field. Below the grid, there is a 'Highlights Panel' and a 'Quick Actions in the Salesforce Classic' section.

The screenshot shows the Salesforce Setup interface for creating a page layout. The left sidebar has the 'Page Layouts' tab selected. The main area displays a grid of fields for the 'Items' object, including 'Section', 'Created By', 'Item', 'Making Charges', 'Prices', 'Record Type', and 'Total Weight'. There is also a 'Blank Space' field. At the bottom of the page layout editor, there is an 'Information' section containing details such as Item ID (GEN-2004-001234), Purity (17), Item (Sample Text), Prices (Sample Text), Gold Price (₹123.45), Customer Name (Sample Text), Ornament (Sample Text), Weight (0.23202), Stone Weight (0.09811), Percentage (64), Stone/Other Price (₹123.45), and Expected Days Of (Sample Text).

We created 3 Reports:

◆ Prices Report

◆ **Item with Billings Report**
 ◆ **Billing with Items & Customer order**

REPORT ▾
 Price report ▾ Prices

Fields ▾

Groups
 GROUP ROWS
 Add group... ▾

Columns
 Add column... ▾
 Price: Customer Price ▾
 Price: Owner Name ▾
 # Gold Price ▾
 # Silver Price ▾

Previewing a limited number of records. Run the report to see everything.

	Price: Customer Price	Price: Owner Name	Gold Price	Silver Price
1	Price-01	Kuruba Sirisha Team	₹80,000.00000	₹70,000.00000
2	Price-02	Kuruba Sirisha Team	₹80,000.00000	₹70,000.00000
			₹1,60,000.00000	₹1,40,000.00000

Update Preview Automatically

Type here to search

Report: Billings with Item
Billings with Item Report

Total Records	Total Amount	Total Total Amount	Total KDM Charge	Total Making Charges	Total Stones/Other Price	Total Stone Weight			
3	₹7,25,600.00	₹9,12,160	₹1,12,560	₹34,000.00	₹40,000.00	40.00			
Item: Item Type	Billing: Billing Name	Item: Item Id	Amount	Ornament	Total Amount	KDM Charge	Making Charges	Stones/Other Price	Stone Weight
Gold (2)	Billing-01	Item-01	₹3,20,000.00	Necklace	₹3,77,000	₹32,000	₹15,000.00	₹10,000.00	10.00
	Billing-02	Item-02	₹4,00,000.00	Necklace	₹5,18,000	₹80,000	₹18,000.00	₹20,000.00	10.00
Subtotal			₹7,20,000.00		₹8,95,000	₹1,12,000	₹33,000.00	₹30,000.00	20.00
Silver (1)	Billing-05	Item-03	₹5,600.00	Necklace	₹17,160	₹560	₹1,000.00	₹10,000.00	20.00
Subtotal			₹5,600.00		₹17,160	₹560	₹1,000.00	₹10,000.00	20.00
Total (3)			₹7,25,600.00		₹9,12,160	₹1,12,560	₹34,000.00	₹40,000.00	40.00

Row Counts Detail Rows Subtotals Grand Total

26°C Haze

Screenshot of a web browser showing a report titled "Billings with item and Customer order". The report displays 4 total records in a table format.

	Customer Billing: Customer Billing	Item: Customer Name
1	Billing-01	Anitha
2	Billing-02	Mikaelson
3	Billing-03	Dharani
4	Billing-04	Nazma

Dashboard: -

Screenshot of a web browser showing the "Recent" dashboard in the Jewelry Inventory System. The dashboard lists recent dashboards and folders.

	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Jewel Dashboard		Private Dashboards	Kuruba Sirisha Team	1/3/2025, 10:32 am	
Created by Me	Billings with item and Customer order		Private Dashboards	Kuruba Sirisha Team	1/3/2025, 6:58 am	

Jewelry Inventory S... Jewel Customers Items Orders Prices Billings Reports Dashboards

Dashboard Jewel Dashboard
Last refreshed 1 day ago. Refresh this dashboard to see the latest data.
As of 01-Mar-2025, 10:35 am: Viewing as Kuruba Sirisha Team

Billings with Item Report

Customer Billing: Customer Billing ↑	Item: Customer Name
Billing-01	Anitha
Billing-02	Mikaelson
Billing-03	Dharani
Billing-04	Nazma

Billings with item and Customer order

Customer Billing: Customer Billing ↑	Item: Customer Name
Billing-01	Anitha
Billing-02	Mikaelson
Billing-03	Dharani
Billing-04	Nazma

Prices Report

Sum of Gold Price

Price Customer Price	₹0	₹20k	₹40k	₹60k	₹80k
Price-01	80k				

View Report (Billings with Item Report) **View Report (Billings with item and Customer order)** **View Report (Prices Report)**

Validation Rules: -

Created Validation Rules under Jewel Customer & Item

SETUP > OBJECT MANAGER

Jewel Customer

Validation Rules 2 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Jewel_Customer_object	Top of Page	Please fill Required fields	✓	Kuruba Sirisha Team, 26/02/2025, 10:38 am
Postal_Code	Zip/Postal code	Must contain 6 digits	✓	Kuruba Sirisha Team, 26/02/2025, 10:27 am

Details **New**

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

Type here to search

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

- Header:** The URL is <https://ssgsdegreecollege-8e-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01INS000002yl4X/ValidationRules/view>.
- Page Title:** Validation Rules (under Object Manager).
- Table Headers:** RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, MODIFIED BY.
- Table Data:** A single row for "Item" with "Top of Page" as the error location, "Please fill Required fields" as the message, an active status, and "Kuruba Sirisha Team, 26/02/2025, 7:43 pm" as the modifier.

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

- Header:** Shows the Windows taskbar with various pinned apps like WhatsApp, Microsoft Edge, and Google Chrome. The URL in the address bar is <https://ssgsdegreecollege-8e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS000002yl4X/ValidationRules/03dNS000002brLxYAI/view>.
- Page Header:** Includes a blue cloud icon, a search bar labeled "Search Setup", and a toolbar with icons for Home, Object Manager, and various system functions.
- Breadcrumbs:** "SETUP > OBJECT MANAGER".
- Section:** "Items" under "Object Manager".
- Page Title:** "Items Validation Rule".
- Content:** "Validation Rule Detail" for the rule named "Item".
 - Fields:** Rule Name (Item), Error Condition Formula (OR(ISBLANK(Amount__c) , ISBLANK(Customer_Name__c) , ISBLANK(Gold_Price__c) , ISBLANK(KDM__c) , ISBLANK(Ornament__c) , ISBLANK(Percentage__c) , ISBLANK(Making_Charges__c) , ISBLANK(Prices__c) , ISBLANK(Stone_Weight__c) , ISBLANK(Silver_Price__c) , ISBLANK(Stone_Other_Price__c) , ISBLANK(Stone_Weight__c) , ISBLANK(Weight__c))), Active (checked).
 - Message:** Error Message: "Please fill Required fields", Error Location: "Top of Page".
 - History:** Created By: "Kuruba Sirisha Team" on 26/02/2025, 10:52 am, Modified By: "Kuruba Sirisha Team" on 26/02/2025, 7:43 pm.
- Left Sidebar:** A vertical sidebar with links: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts.

Screenshot of the Salesforce Object Manager page for the 'Jewel Customer' object.

Left Sidebar:

- 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

Main Content Area:

Jewel Customer Validation Rule

[Back to Jewel Customer](#)

Validation Rule Detail

Rule Name	Jewel_Customer_object	Active	<input checked="" type="checkbox"/>
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	Kuruba Sirisha Team	Created Date	26/02/2025, 10:38 am
Modified By	Kuruba Sirisha Team	Modified Date	26/02/2025, 10:38 am

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Schema Builder: -

We created Schema Builders for Jewel Customer, Price, Item, Customer order & Billing.

Screenshot of the Schema Builder interface.

Left Sidebar:

- Elements
- Objects
- Select objects to display on the builder.
- Select from: All Objects
- Quick Find...
- [Select All](#) | [Clear All](#)
- Account
- Activity
- Address
- Alternative Payment Method
- Appointment Category
- Appointment Invitation
- Appointment Invitee
- Appointment Topic Time Slot
- Approval Submission
- Approval Submission Detail
- Approval Work Item
- Asset

Main Content Area:

The Schema Builder displays relationships between various objects. Key components include:

- Billing:** Connected to Price and Customer Order.
- Price:** Connected to Customer Order.
- Customer Order:** Connected to Billing, Price, and Item.
- Item:** Connected to Customer Order.
- Jewel Customer:** Connected to Billing, Price, Customer Order, and Item.

Legend:

- Lookup Relationship (Blue line)
- Master-Detail Relationship (Red line)
- Required Field (Red border)

[Help for this Page](#)



Field Dependencies: -

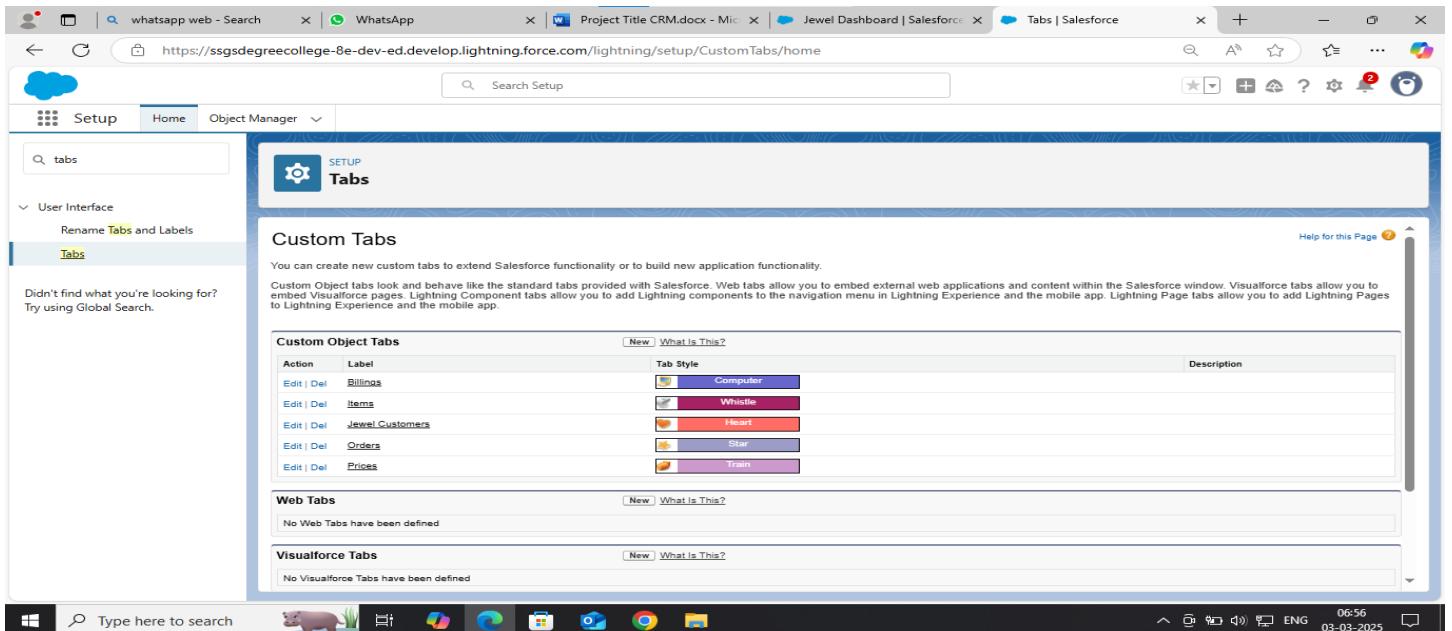
We created Field Dependencies under Item objects

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'SETUP' and contains a 'Fields & Relationships' section with various options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Items Field Dependencies' and includes a table with one row: Action (Edit | Del), Controlling Field (Priority), Dependent Field (Expected Days Of Return), and Modified By (Kuruba Sirisha Team, 26/02/2025, 10:02 am). A 'Help for this Page' link is in the top right.

The screenshot shows the 'Edit Field Dependency' page. It has a 'Controlling Field' set to 'Priority' and a 'Dependent Field' set to 'Expected Days Of Return'. The 'Instructions' section provides guidance on using the grid. The main area is a grid where rows represent 'Priority' and columns represent 'Expected Days Of Return'. The grid shows values for Low, Medium, High, and Critical priorities across different day ranges. Buttons for 'Include Values' and 'Exclude Values' are at the bottom of each column. A legend indicates that yellow cells represent 'Excluded Value' and green cells represent 'Included Value'.

Tabs:-

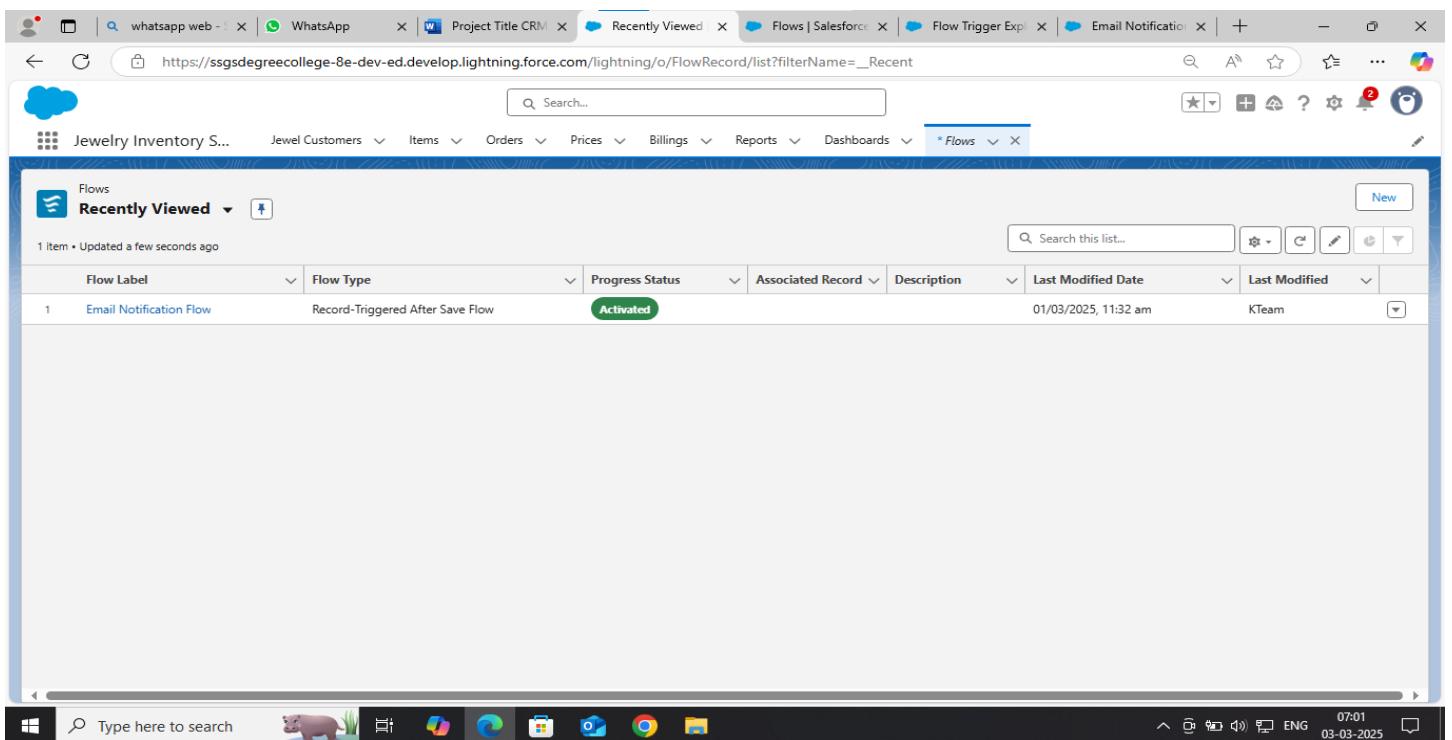
We created **Tabs** for Jewel Customer, Prices, Items, Billing & Customer Order.



The screenshot shows the Salesforce Setup interface under the 'User Interface' category, specifically the 'Tabs' section. The left sidebar has a search bar and a 'Custom Tabs' section. The main area displays a table for 'Custom Object Tabs' with columns for Action, Label, Tab Style, and Description. It lists tabs for 'Billings' (Computer icon), 'Items' (Whistle icon), 'Jewel Customers' (Heart icon), 'Orders' (Star icon), and 'Prices' (Train icon). Below this are sections for 'Web Tabs' and 'Visualforce Tabs', both of which currently have no defined tabs.

Flows:-

We created flows



The screenshot shows the Salesforce Flow Record list page. The top navigation bar includes tabs for 'Flows', 'Recently Viewed', and 'Email Notifications'. The main content area displays a table for 'Flow Record' with columns for Flow Label, Flow Type, Progress Status, Associated Record, Description, Last Modified Date, and Last Modified. A single record is listed: 'Email Notification Flow' (Record-Triggered After Save Flow, Activated status, last modified on 01/03/2025 at 11:32 am by KTeam).

The screenshot shows the 'Email Notification Flow' details page in the Salesforce interface. The flow is named 'Email Notification Flow' and is of type 'Record—Run After Save'. It is associated with the 'Jewelry Inventory S...' object. The progress status is 'Activated' with a green button. The last modified date is '01/03/2025, 11:32 am' by 'Kuruba Sirisha Team'. The 'Details' tab is selected, showing fields like API Name ('Email_Notification_Flow'), Flow Type ('Record-Triggered After Save Flow'), and various creation and modification details. A subcategory field is also present.

(5) Testing & Validation:

User Interface Testing:

❖ Record Types:-

We Created Record types in item object and labeled as “Gold” and “Silver”.

The screenshot shows the 'Object Manager' section for the 'Items' object in the Salesforce setup. The 'Record Types' tab is selected in the sidebar. There are two record types listed: 'Gold' and 'Silver'. Both are active and were modified by 'Kuruba Sirisha Team' on 26/02/2025 at 2:06 pm and 2:09 pm respectively. The 'Gold' record type has a description of 'Gold items information'.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	Kuruba Sirisha Team, 26/02/2025, 2:06 pm
Silver*	Silver items information	✓	Kuruba Sirisha Team, 26/02/2025, 2:09 pm

Screenshot of the Salesforce Setup > Object Manager page for the 'Items' object.

Record Type: Gold

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	Active	✓
Record Type Name	Gold		
Namespace Prefix			
Description	Gold items information		
Created By	Kuruba Sirisha Team, 26/02/2025, 2:06 pm	Modified By	Kuruba Sirisha Team, 26/02/2025, 2:06 pm

Picklists Available for Editing

Action	Field	Modified Date
Edit	Expected Days Of Return	26/02/2025, 2:06 pm
Edit	Item	26/02/2025, 2:06 pm
Edit	Priority	26/02/2025, 2:06 pm

Screenshot of the Salesforce Setup > Object Manager page for the 'Items' object.

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		
Namespace Prefix			
Description	Silver items information		
Created By	Kuruba Sirisha Team, 26/02/2025, 2:09 pm	Modified By	Kuruba Sirisha Team, 26/02/2025, 2:09 pm

Picklists Available for Editing

Action	Field	Modified Date
Edit	Expected Days Of Return	26/02/2025, 2:09 pm
Edit	Item	26/02/2025, 2:09 pm
Edit	Priority	26/02/2025, 2:09 pm

★ Permission Sets: -

We created permission sets and labeled as “Per to Worker” and selected object permissions for “Read, Edit, Create”.

The screenshot shows the Salesforce Setup interface under the 'Permission Sets' section. A permission set named 'Per to Worker' is selected. The 'Permission Set Overview' section displays basic information: API Name 'Per_to_Worker', Namespace Prefix 'Kuruba_Sirisha_Team', Created By 'Kuruba Sirisha Team' on 26/02/2025, 5:56 pm, and Last Modified By 'Kuruba Sirisha Team' on 26/02/2025, 10:17 am. The 'Description' field is empty, and the 'License' field shows 'Session Activation Required' with an unchecked checkbox. The 'Permission Set Groups Added To' field shows 0. The 'Apps' section lists various settings under 'Assigned Apps' and 'Assigned Connected Apps'. Under 'Object Settings', it includes 'Object Settings', 'App.Permissions', 'Apex Class Access', and 'Visualforce Page Access'.

The screenshot shows the 'Items' tab for the 'Per to Worker' permission set. It includes a 'Tab Settings' section where the 'Available' checkbox is checked and the 'Visible' checkbox is checked. Below this is a 'Items: Record Type Assignments' section showing assignments for 'Gold' and 'Silver' record types. The 'Assigned Record Types' column has checkboxes checked for both. The final section is 'Object Permissions' with a table:

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input type="checkbox"/>

★ Profiles: -

We created 2 Profiles and given name as

- Gold Smith Profile

- **Worker Profile**

Screenshot of the Salesforce Setup interface showing the 'Profiles' section for 'Gold Smith'. The left sidebar shows the 'Profiles' section under 'Users'. The main area displays the 'Profile Edit' screen for 'Gold Smith' with fields for Name (Gold Smith), User License (Salesforce), and Description. The 'Custom App Settings' section lists various application components with checkboxes for 'Visible' and 'Default' status.

Screenshot of the Salesforce Setup interface showing the 'Profiles' section for 'Gold Smith'. The left sidebar shows the 'Profiles' section under 'Users'. The main area displays the 'Profile Edit' screen for 'Gold Smith' with sections for 'Basic Access', 'Data Administration', 'Session Settings', and 'Password Policies'. The 'Basic Access' and 'Data Administration' sections show permissions for various objects like Billings, Orders, Items, Jewel Customers, Prices, and Prizes. The 'Session Settings' section shows session timeout and security level requirements. The 'Password Policies' section defines password complexity rules.

Screenshot of the Salesforce Setup interface showing the 'Profiles' page.

The URL in the browser is <https://ssgsdegreecollege-8e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eNS000005aidx%2Fe%3FretU...>

The page title is "Profiles".

The left sidebar navigation includes:

- Hyperforce Assistant
- Users
 - Profiles (selected)
 - Data
 - Mass Transfer Approval Requests
- Feature Settings
 - Approval Settings
- Data.com
 - Prospector Preferences
 - Prospector Users
- Decision Explainer
- Business Process Type Definition
- Functions
- Marketing
 - Lead Processes
- Sales
 - Products
 - Asset Settings
 - Product Schedules

The main content area shows the "worker profile" edit screen. The profile details are as follows:

Name	worker profile
User License	Salesforce Platform
Description	(Empty text area)

Custom Profile checkbox is checked.

Custom App Settings section lists three items:

App	Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>
Jewelry Inventory System (Jewelry_Inventory_System)	<input type="checkbox"/>	<input checked="" type="radio"/>

Service Provider Access section contains a single checkbox: "Overwrite users' personal tab customizations".

Tab Settings section includes:

- Standard Tab Settings:
 - Home: Default On
 - Accounts: Default On
 - All Sites: Tab Hidden
- Inventory Operations: Tab Hidden
- Inventory Reservations: Tab Hidden
- Invoices: Tab Hidden

Save, Save & New, and Cancel buttons are at the top right of the profile edit form.



★ Validation Rules: -

The screenshot shows the Salesforce Object Manager interface for the 'Items' object. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area displays a table titled 'Validation Rules' with one item listed:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Item	Top of Page	Please fill Required fields	✓	Kuruba Sirisha Team, 26/02/2025, 7:43 pm

The screenshot shows the details of a validation rule named 'Item'. The 'Validation Rule Detail' section includes:

Rule Name	Item	Active	
Error Condition Formula	OR(ISBLANK(Amount__c) , ISBLANK(Customer_Name__c) , ISBLANK(Gold_Price__c) , ISBLANK(KOM__c) , ISBLANK(Ornament__c) , ISBLANK(Percentage__c) , ISBLANK(Making_Charges__c) , ISBLANK(Prices__c) , ISBLANK(Stone_Weight__c) , ISBLANK(Silver_Price__c) , ISBLANK(Stone_Other_Price__c) , ISBLANK(Stone_Weight__c) , ISBLANK(Weight__c))	✓	
Error Message	Please fill Required fields	Error Location	Top of Page
Description			
Created By	Kuruba Sirisha Team, 26/02/2025, 10:52 am	Modified By	Kuruba Sirisha Team, 26/02/2025, 7:43 pm

Screenshot of the Salesforce Setup - Object Manager - Items Validation Rule page.

The page title is "Items Validation Rule".

Left sidebar navigation:

- 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

Main content area:

Validation Rule Edit

Rule Name: Item

Active:

Description: (empty)

Error Condition Formula

Example: Discount_Percent_c>0.30 More Examples..

If the formula expression is true, display the text defined in the Error Message area

Formula editor:

```
OR( ISBLANK(Amount__c) , ISBLANK(Customer_Name__c) , ISBLANK(Gold_Price__c) , ISBLANK(KDM__c) , ISBLANK(Ornaments__c) , ISBLANK(Percentage_c) , ISBLANK(Making_Charges__c) , ISBLANK(Price__c) , ISBLANK(Stone_Amount__c) , ISBLANK(Silver_Price__c) , ISBLANK( Stone_Other_Price__c) , ISBLANK(Stone_Weight__c) , ISBLANK( Weight__c ) )
```

Functions dropdown:

- All Function Categories --
- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Help on this function

Check Syntax

Quick Tips:

- Operators & Functions

Help for this Page



★ Flows:-

The screenshot shows the Salesforce Flow Builder interface. The URL in the browser is https://ssgsdegreecollege-8e-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301NS0000155yJV. The flow is titled "Email Notification Flow - V1".

Toolbox:

- Elements Manager**
- Interaction (3)**
 - Action
 - Subflow
 - Custom Error
- Logic (6)**
 - Assignment
 - Decision
 - Loop
 - Transform
 - Collection Sort
 - Collection Filter
- Data (4)**
 - Create Records
 - Update Records
 - Get Records
 - Delete Records

Flow Details:

- Start:** Record-Triggered Flow
- Object:** Billing
- Trigger:** A record is created
- Optimize for:** Actions and Related Records
- Buttons:** Run Immediately, Action, Notice
- Actions:** Open Flow Trigger Explorer for Billing

System Status:

- Last saved on 1/3/2025, 11:32 am (Active)
- Run, Debug, View Tests, Save As New Version, Save, Deactivate

System Navigation:

- Get more on the AppExchange
- Type here to search
- Windows Start button
- Search bar with a hippo icon
- Taskbar icons: File Explorer, OneDrive, Google Chrome, Microsoft Edge, File Explorer, Task View, Taskbar settings, ENG, 07:45, 03-03-2025

★ User Adoption: -

We created some jewel customers, items, billings, prices, customer orders in Jewelry Inventory System.

The screenshot shows the Salesforce Lightning Experience interface. The top navigation bar includes tabs for WhatsApp web - Search, WhatsApp, Users | Salesforce, and Project Title CRM.docx - Microsoft Word. Below the bar, the main area has a blue header with a cloud icon and the word "Setup". The "Users" tab is selected. A search bar at the top right contains the placeholder "Search Setup". On the left, there's a sidebar with a search field containing "user adp" and a message stating "No matching items found". The main content area displays the "User Detail" page for a user named "Niklaus Mikaelson". The page includes a toolbar with "Edit", "Sharing", "Reset Password", "Freeze", and "View Summary" buttons. The user's details are listed in a table:

Name	Niklaus Mikaelson	Role	Gold Smith
Alias	nmika	User License	Salesforce
Email	mugithidharani@gmail.com <small>[Verify]</small>	Profile	Gold Smith
Username	sirisha@123gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17405574621755108520	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View

At the bottom of the page, there are links for "Permission Set Assignments", "Activation Required", "Group Assignments", "License Assignments", "Personal Groups", "Public Group Membership", "Queue Membership", "Team", "Managers in the Role Hierarchy", "OAuth Apps", "Third-Party Account Links", "Installed Mobile Apps", "Authentication Settings for External Systems", "Login History", and "User Provisioning Accounts". The bottom of the screen shows the Windows taskbar with icons for File Explorer, Edge, and other applications, along with system status indicators like battery level, signal strength, and date/time (09:49, 03-03-2025).

S whatsapp web - Search | WhatsApp | Users | Salesforce | Project Title CRM.docx - Microsoft Word

https://ssgsdegreecollege-8e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005NS00000Ha66j%3Fnoredirect%3D1%2...

Cloud Search Setup Home Object Manager

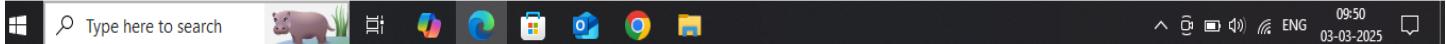
Q user adp No matching items found Didn't find what you're looking for? Try using Global Search.

SETUP Users User Kuruba Sirisha Team User Profile Help for this Page

Permission Set Assignments [1] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] | Team [0] | Managers in the Role Hierarchy [0] | OAuth Apps [1] | Third-Party Account Links [0] | Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [10+] | User Provisioning Accounts [0]

User Detail Edit Sharing Change Password View Summary

Name	Kuruba Sirisha Team	Role
Alias	KTeam	User License
Email	mugithidharani@gmail.com [Verified]	Profile
Username	jewel@kurubasirishateam.com	Active
Nickname	jewel	Marketing User
Title		Offline User
Company	SSGS degree college	Knowledge User
Department		Flow User
Division		Service Cloud User
Address	Koya nagar,near kasapuram road Guntakal 515801 AP INDIA	Site.com Contributor User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User
Locale	English (India)	WDC User



S WhatsApp web - Search X WhatsApp X Permission Sets | Salesforce X Project Title CRM.docx - Microsoft Word +

https://ssgsdegreecollege-8e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSNS00006WefW

Cloud Search Setup Home Object Manager ▾

Q user adp

No matching items found

Didn't find what you're looking for?
Try using Global Search.

SETUP Permission Sets

Permission Set Experience Profile Manager Video Tutorial | Help for this Page ?

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

Permission Set Overview

Description	API Name
Salesforce	Experience_Profile_Manager

Namespace Prefix

Created By Kuruba Sirisha Team, 20/02/2025, 10:28 am

Last Modified By Kuruba Sirisha Team, 28/02/2025, 10:17 am

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

https://ssgsdegreecollege-8e-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/OPSNS00006WefW?sdtp=p1



(6) Conclusion: -

CRM is a tool that allows businesses to manage relationships with their customers effectively. Customer Relationship management is a business strategy that enables a business organization to maximize revenue, customer satisfaction, and profitability through strategic mobilization, organization, and management of customer's interests and desires. BMW has traversed numerous business challenges that made it establish a CRM that will foster customer relationship as a baseline for market strengthening and diversification. BMW has diversified its market in various global markets through the initiation of the CRM systems. The system has significantly contributed to the company's financial, operational, managerial and development initiatives with a robust customer relationship that has fostered great sales of its product. Mercedes Benz operates a similar customer relationship management system just BMW and due to market power, the company has its customer roots to various market bases. Mercedes has majored in customer-dealership business relationships. This has provided the company with strategic mechanization of customer retention, satisfaction and purchase behavior enhancing the company's profitability through an increased purchase command. The two companies are among the leading CRM implementers in automotive.



CRM system is critical for jewelry businesses, allowing them to effectively manage customer relationships by centralizing data, enabling personalized interactions, optimizing sales processes, and gaining valuable insights into customer behavior, ultimately leading to increased sales, improved customer loyalty, and a more streamlined business operation through tailored marketing strategies and exceptional customer service.

A CRM (Customer Relationship Management) system for jewelers is essential for managing customer relationships, enhancing sales, and improving overall business efficiency.



Jewelry businesses face a multitude of challenges, from fierce competition to changing consumer preferences and limited budgets for marketing and advertising. It can be a tough market to navigate, but the good news is that

implementing a customer relationship management (CRM) system can help overcome many of these challenges.

One of the biggest challenges facing jewelry businesses is the need to stay relevant and top of mind with customers. With so many options available, consumers are easily distracted and can quickly forget about your brand. A CRM system can help you stay top of mind by enabling you to communicate with customers on a regular basis and provide personalized recommendations based on their preferences.

Another challenge is managing inventory and ensuring that you have the right products available at the right time. A CRM system can help you keep track of inventory levels and alert you when products are running low or need to be restocked. This can help you avoid lost sales due to out-of-stock items and ensure that you always have a variety of products available to meet customer demand.

Finally, jewelry businesses face the challenge of attracting new customers and retaining existing ones. A CRM system can help you identify customer segments and target them with personalized marketing messages that resonate with their specific interests and preferences.

