

CRM JEWELLERY MANAGEMENT

COLLEGE NAME : A.V.P. College of Arts and Science

COLLEGE CODE : bruaj

TEAM ID: NM2025TMID25469

TEAM MEMBERS:

- **Team Leader Name :** ARTHIYA S
Email: arthisankar062005@gmail.com
- **Team Member1:** KRISHNIKA D
Email: luvlygurldk@gmail.com
- **Team Member2:** VAITHEGI S
Email: vaihegi038@gmail.com
- **Team Member3:** SHIFANA PARVIN A
Email: shifaabdul09@gmail.com

INTRODUCTION

Project Overview

Our CRM solution for the jewellery industry is designed to revolutionize customer interactions, inventory management, and sales processes. By providing a tailored platform for high-end jewellery businesses, we enable personalized service, operational efficiency, and long-term customer loyalty, ultimately driving business growth and success.

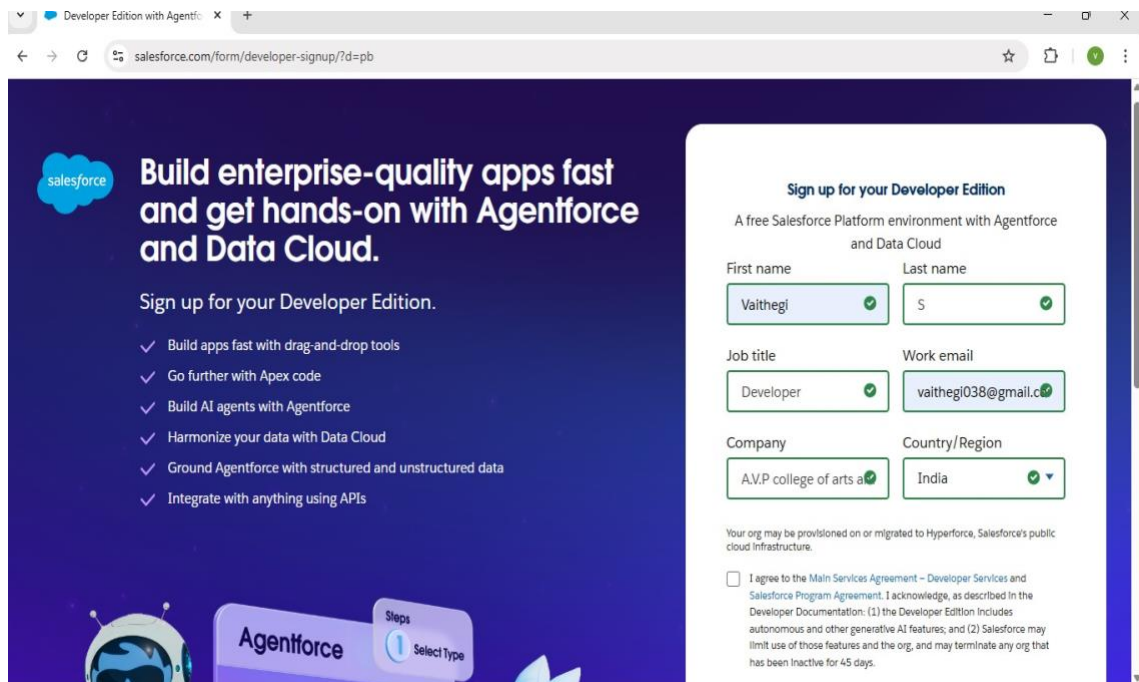
Purpose

The goal of this project is to create a tailored CRM solution for jewellery retailers, enhancing customer engagement, streamlining operations, and informing business decisions through centralized customer data, automated marketing, and inventory tracking, ultimately leading to increased sales, customer loyalty, and competitiveness.”

DEVELOPMENT PHASE

Creating Developer Account:

- By using this URL - <https://naanmudhalvan.smartinternz.com>



The screenshot shows a web browser window with the URL `salesforce.com/form/developer-signup/?d=pb`. The page has a dark blue header with the Salesforce logo and the text "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists several benefits with checkmarks: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", "Ground Agentforce with structured and unstructured data", and "Integrate with anything using APIs". At the bottom left, there is a graphic of a robot head and a button labeled "Agentforce" with a "Steps" indicator and "Select Type".

The main content area is a white box titled "Sign up for your Developer Edition" with the subtitle "A free Salesforce Platform environment with Agentforce and Data Cloud". It contains a form with the following fields:

First name	Last name
Vaithegi	S

Job title	Work email
Developer	vaithegi038@gmail.com

Company	Country/Region
A.V.P college of arts a	India

Below the form, there is a disclaimer: "Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud Infrastructure." and a checkbox for "I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition Includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days."

- Created Objects: Customer order, jewel customer, billings, iems

orgfarm-139573d900-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL00000115ID/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Details

Description

API Name
Item_c

Custom
✓

Singular Label
Item

Plural Label
Items

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

EditDelete

orgfarm-139573d900-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL00000115ID/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Details

Description

API Name
Item_c

Custom
✓

Singular Label
Item

Plural Label
Items

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

EditDelete

- Configure fields and relationships

orgfarm-139573d900-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL00000114Fh/FieldsAndRelationships/00NgL000001MGgR7/view

Setup Home Object Manager

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

Jewel Customer Custom Field
Phone
Back to Jewel Customer

Validation Rules

Custom Field Definition Detail
Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Phone	Object Name	Jewel Customer
Field Name	Phone	Data Type	Phone
API Name	Phone__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Vaithedi S.	Modified By	Vaithedi S.
	8/26/2025, 7:12 PM		8/26/2025, 7:12 PM

General Options

Required ☐

Default Value

orgfarm-139573d900-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL00000114Fh/FieldsAndRelationships/view

Setup Home Object Manager

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

Fields & Relationships
11 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Country	Country__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Customer name	Name	Text(80)		✓
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
Phone	Phone__c	Phone		

- Creating tabs

orgfarm-139573d900-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

Setup Home Object Manager

tab

Feature Settings

- Analytics
 - Tableau
 - Tableau Embedding
 - Tableau UAF Claims Definition
- User Interface
 - Console Settings
 - Loaded Console Tab Limit
 - Rename Tabs and Labels
 - Tabs**

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

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Billings	Umbrella	
Edit Del	Customer Orders	Ship	
Edit Del	Items	Boat	
Edit Del	Jewel Customers	Airplane	
Edit Del	Prices	Factory	

Web Tabs

No Web Tabs have been defined.

orgfarm-139573d900-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL00000115U/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Customer Order

Details

Fields & Relationships

6 Items, Sorted by Field Label

[New](#) [Deleted Fields](#) [Field Dependencies](#) [Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Jewel Customer)		✓
Customer Order id	Name	Auto Number		✓
Item	Item__c	Master-Detail(Item)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Order Status	Order_Status__c	Picklist		

- Creating user profile

The screenshot displays the Lightning App Builder interface for configuring a new Lightning App. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'KMC Jewels'. The left sidebar shows the 'App Settings' section with sub-items: 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items' (selected), 'Navigation Rules', and 'User Profiles'.

The main content area is titled 'Navigation Items' and includes a description: 'Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.' Below this, there are two columns: 'Available Items' and 'Selected Items'. The 'Available Items' column contains a search bar and a list of items including 'Accounts', 'Alert Settings', 'All Sites', 'Alternative Payment Methods', 'App Launcher', 'Appointment Invitations', 'Approval Requests', 'Asset Action Sources', 'Asset Actions', and 'Asset Services'. The 'Selected Items' column contains a list of items including 'Jewel Customers', 'Items', 'Customer Orders', 'Prices', 'Billings', 'Reports', and 'Dashboards'.

Below the 'Navigation Items' section, there is a section titled 'New Lightning App' with a sub-section 'User Profiles'. The 'User Profiles' section includes a description: 'Choose the user profiles that can access this app.' Below this, there are two columns: 'Available Profiles' and 'Selected Profiles'. The 'Available Profiles' column contains a search bar and a list of profiles including 'System administrator'. The 'Selected Profiles' column contains a list of profiles including 'System Administrator'. Red arrows indicate the process of selecting the 'System administrator' profile from the 'Available Profiles' column and moving it to the 'Selected Profiles' column using the right arrow button.

At the bottom of the interface, there is a progress bar with four steps. The first three steps are completed, and the fourth step is currently active. A red arrow points to the 'Save & Finish' button in the bottom right corner.

- Creating Lookup Relationship

The screenshot shows the Salesforce Setup interface for creating a new relationship for the 'Customer Order' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Customer Order New Relationship' and is at 'Step 6 of 6: Add custom related lists'. A table displays the relationship details: Field Label (Customer), Data Type (Lookup), Field Name (Customer), and Description. Below the table, there is a text input for 'Related List Label' with the value 'Customer Orders'. Instructions specify that the title should be the title of the related list in all layouts associated with the parent. There is also a section for selecting page layouts to include this field, with a note that the field will be added as the last field in the first 2-column section. At the bottom, there is a table with columns 'Add Related List' and 'Page Layout Name'.

Platform Login Credentials - Ph x Student x Home | Salesforce x Customer Order | Salesforce x

orgfarm-6969066e15-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK0000023xaH/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Customer Order

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

Customer Order New Relationship

Step 6 of 6

Previous Save & New Save Cancel

Field Label	Customer
Data Type	Lookup
Field Name	Customer
Description	

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

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

Add Related List	Page Layout Name
------------------	------------------

This is a duplicate of the screenshot above, showing the same Salesforce Setup interface for creating a new relationship for the 'Customer Order' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Customer Order New Relationship' and is at 'Step 6 of 6: Add custom related lists'. A table displays the relationship details: Field Label (Customer), Data Type (Lookup), Field Name (Customer), and Description. Below the table, there is a text input for 'Related List Label' with the value 'Customer Orders'. Instructions specify that the title should be the title of the related list in all layouts associated with the parent. There is also a section for selecting page layouts to include this field, with a note that the field will be added as the last field in the first 2-column section. At the bottom, there is a table with columns 'Add Related List' and 'Page Layout Name'.

Platform Login Credentials - Ph x Student x Home | Salesforce x Customer Order | Salesforce x

orgfarm-6969066e15-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK0000023xaH/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Customer Order

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

Customer Order New Relationship

Step 6 of 6

Previous Save & New Save Cancel

Field Label	Customer
Data Type	Lookup
Field Name	Customer
Description	

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

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

Add Related List	Page Layout Name
------------------	------------------

Platform Login Credentials - Pr x Student x Home | Salesforce x Customer Order | Salesforce x +

orgfarm-6969066e15-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK0000023xaH/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Customer Order

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

Customer Order

New Relationship

Help for this Page

Step 2. Choose the related object Step 2 of 6

Previous Next Cancel

Select the other object to which this object is related.

Related To --None--

Previous Next Cancel

Platform Login Credentials - Pr x Student x Home | Salesforce x Customer Order | Salesforce x +

orgfarm-6969066e15-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK0000023xaH/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Customer Order

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

Customer Order

New Relationship

Help for this Page

Step 5. Add reference field to Page Layouts Step 5 of 6

Previous Next Cancel

Field Label	Item
Data Type	Master-Detail
Field Name	Item
Description	

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Customer Order Layout

Previous Next Cancel

- Creating Text Field in Jewel Customer Object

The screenshot shows the Salesforce Setup interface for creating a new custom field for the Jewel Customer object. The page is titled "New Custom Field" and is at "Step 2 of 4: Enter the details". The left sidebar shows the navigation menu with "Fields & Relationships" selected. The main content area has three input fields: "Field Label" with the value "City", "Length" with the value "20", and "Field Name" with the value "City". A red box highlights the "City" text in the Field Label field. Below the Length field, there is a note: "Please enter the maximum length for a text field below." The "Previous", "Next", and "Cancel" buttons are visible at the bottom right of the form.

The screenshot shows the Salesforce Setup interface for creating a new custom field for the Jewel Customer object. The page is titled "New Custom Field" and is at "Step 2 of 4: Enter the details". The left sidebar shows the navigation menu with "Fields & Relationships" selected. The main content area has four input fields: "Field Label" with the value "Phone", "Field Name" with the value "Phone", "Description" (empty), and "Help Text" (empty). Below the input fields, there are two checkboxes: "Required" (unchecked) and "Add this field to existing custom report types that contain this entity" (checked). The "Default Value" field is empty, and there is a link "Show Formula Editor" next to it. The "Previous", "Next", and "Cancel" buttons are visible at the bottom right of the form.

- Creating Currency Field in Price Object

The screenshot shows the Salesforce Setup interface for the 'Price' object. The left sidebar contains a navigation menu with 'Fields & Relationships' selected. The main content area is titled 'Price' and contains the following fields:

- Field Label:** Gold price
- Length:** 8 (Number of digits to the left of the decimal point)
- Decimal Places:** 0 (Number of digits to the right of the decimal point)
- Field Name:** Gold_price
- Description:** (Empty text box)
- Help Text:** (Empty text box)

Buttons for 'Previous', 'Next', and 'Cancel' are located at the top right of the form.

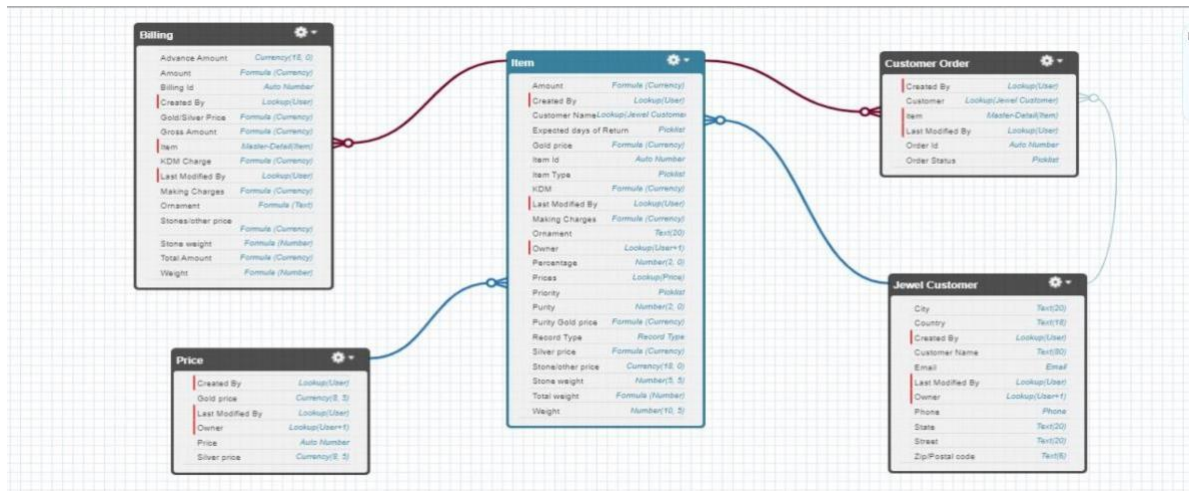
- Creating Formula Field(Cross Object) in Item Object

The screenshot shows the Salesforce Setup interface for the 'Item' object. The left sidebar contains a navigation menu with 'Fields & Relationships' selected. The main content area is titled 'Item' and contains the following elements:

- Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.**
- Example:** Gross Margin = Amount - Cost_c
- Simple Formula:** Gold price (Currency) = prices_r.Gold_price_c / 10
- Advanced Formula:** (Empty text box)
- Functions:** A list of functions including ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN.
- Insert Selected Function:** (Button)

Buttons for 'Previous', 'Next', and 'Cancel' are located at the top right of the form.

- Creating Schema Builder



- Creating the Field Dependencies

Setup

Object Manager

Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Save Cancel Preview

Controlling Field Priority

Dependent Field Expected days of Return

Instructions

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use Shift + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Legend

- Excluded Value
- Included Value

Click button to include or exclude selected values from the dependent picklist:

Include Values Exclude Values

Showing Columns: 1 - 4 (of 4) < Previous Next > View All Go to

Priority:	Low	Medium	High	Critical
Expected days of Return:	1-3 Days	1-3 Days	1-3 Days	1-3 Days
	4-5 Days	4-5 Days	4-5 Days	4-5 Days
	6-7 Days	6-7 Days	6-7 Days	6-7 Days
	8-10 Days	8-10 Days	8-10 Days	8-10 Days

Showing Columns: 1 - 4 (of 4) < Previous Next > View All

Click button to include or exclude selected values from the dependent picklist:

Include Values Exclude Values

Save Cancel Preview

- Creating the validation rule

Jewel Customer

Validation Rules

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers

Validation Rule Edit

Save Save & New Cancel

Rule Name: Postal Code

Active: ☒

Description:

Error Condition Formula

Example: Discount_Percent__c > 30% More Examples...

Display an error if Discount is more than 30%

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

Insert Field Insert Operator

```
AND(
    OR(
        LEN( Zip_Postal_code__c ) <> 6,
        NOT(REGEX(Zip_Postal_code__c, "[0-9]{6}$"))
    ),
    NOT(ISBLANK(Zip_Postal_code__c))
)
```

Check Syntax No errors found

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message: Must contain 6 digits

This error message can either appear at the top of the page or below a specific field on the page

Error Location: ☐ Top of Page ☒ Field Zip/Postal code

Save Save & New Cancel

Functions

-- All Function Categories --

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCH
- ASIN

Insert Selected Function

ABS(number)
Returns the absolute value of a number, a number without its sign

[Help on this function](#)

- Creating gold smith profile

[illegible]

- Creating Gold Smith Role

The screenshot shows the Salesforce Setup interface. On the left is a navigation sidebar with 'Setup' at the top, followed by 'Home' and 'Object Manager'. Below these are search filters for 'roles' and a list of categories: Users, Roles (highlighted), Feature Settings, Sales, Service, and Case Teams. The main content area is titled 'Roles' and shows the 'Role Edit' form for 'Gold Smith'. The form includes fields for 'Label' (Gold Smith), 'Role Name' (Gold_Smith), 'This role reports to' (CEO), and 'Role Name as displayed on reports' (Gold Smith). At the bottom of the form are 'Save', 'Save & New', and 'Cancel' buttons. A 'Help for this Page' link is visible in the top right corner of the main content area.



- Creating User

The screenshot shows the 'User Edit' page for 'Niklaus Mikaelson' in the Salesforce Setup interface. The left sidebar contains navigation links for 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The main content area is titled 'User Edit' and includes a 'Save' button, a 'Save & New' button, and a 'Cancel' button. The 'General Information' section contains fields for First Name (Niklaus), Last Name (Mikaelson), Alias (nmika), Email (nadeem@thesmartbridge.co), Username (nicklaus@nick.org), Nickname (nicklaus), Title, Company, Department, and Division. The 'Role' field is highlighted with a red box, showing 'Gold Smith' selected from a dropdown menu. Other fields include User License (Salesforce), Profile (Gold Smith), Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type (None), Data.com Monthly Addition Limit (300), Accessibility Mode (Classic Only), High-Contrast Palette on Charts, Load Lightning Pages While Scrolling (checked), Debug Mode, and Send Apex Warning Emails.

- Creating a page layout

The screenshot shows the 'Page Layout' editor in Salesforce. The left sidebar contains navigation links for 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Search Layouts', 'List View Button Layout', 'Restriction Rules', and 'Scoping Rules'. The main content area is titled 'Page Layout' and includes a 'Save' button, a 'Quick Save' button, a 'Preview As...' button, a 'Cancel' button, and a 'Layout Properties' button. The 'Fields' tab is selected, showing a list of fields and their properties. The 'Section' field is highlighted with a red box, and the 'Purity' field is highlighted with a yellow box. The 'Section' field has a 'Quick Find' field and a 'Field Name' field. The 'Purity' field has a 'Label' field and a 'Type' field. The 'Section' field is also highlighted with a red box, and the 'Purity' field is highlighted with a yellow box. The 'Section' field has a 'Quick Find' field and a 'Field Name' field. The 'Purity' field has a 'Label' field and a 'Type' field.

- Creating permission set

... > PERMISSION SET 'PER TO WORKER' > MANAGE ASSIGNMENT EXPIRATION

Per to Worker

Select an Expiration Option For Assigned Users

☒ No expiration date ⓘ
☐ Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

ⓘ Time Zone
 Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Mani deepak	Worker	Worker	✓	Salesforce Platform	Never Expires

Cancel Back Assign

- Create a Trigger Handler class

orgfarm-139573d900-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help < >

UpdatePaidAmountTriggerHandler.apxc

Code Coverage: None API Version: 64 Go To

```

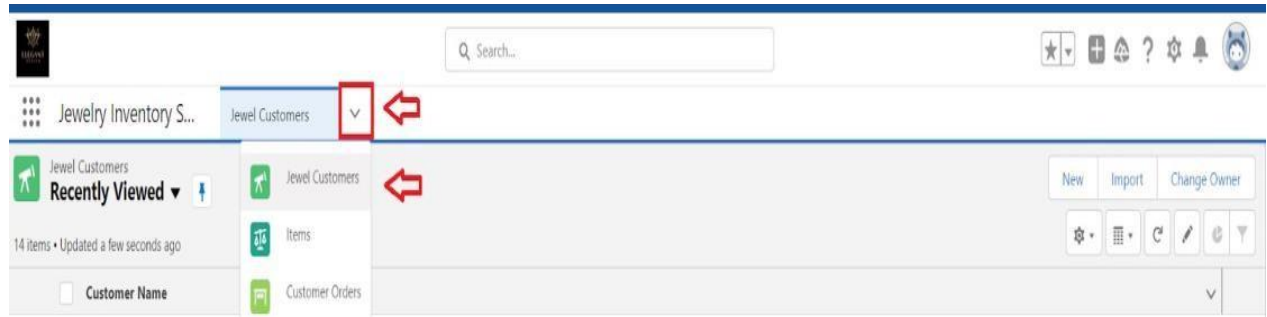
1 public class UpdatePaidAmountTriggerHandler {
2
3     public static void handleBeforeInsert(List<Billing__c> newBillings) {
4
5         for (Billing__c billing : newBillings) {
6
7             billing.Paid_Amount__c = billing.Paying_Amount__c;
8
9         }
10    }
11
12
13
14
15    public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap, List<Billing__c> updatedBillings) {

```

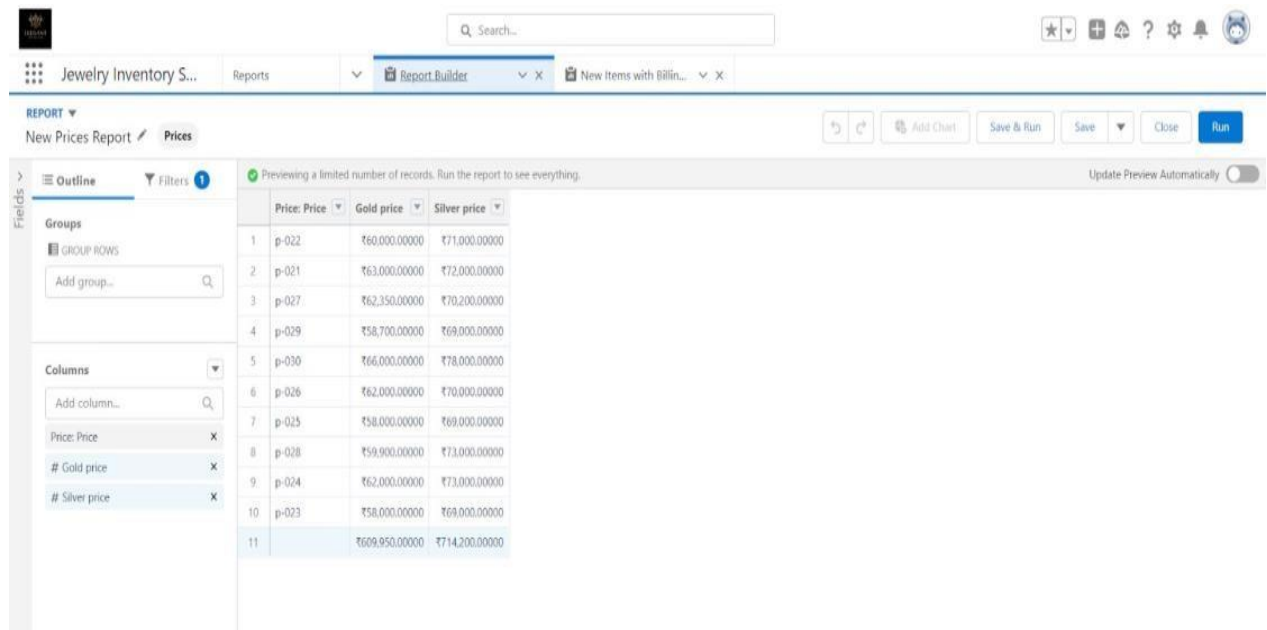
Logs Tests Checkpoints Query Editor View State Progress Problems

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

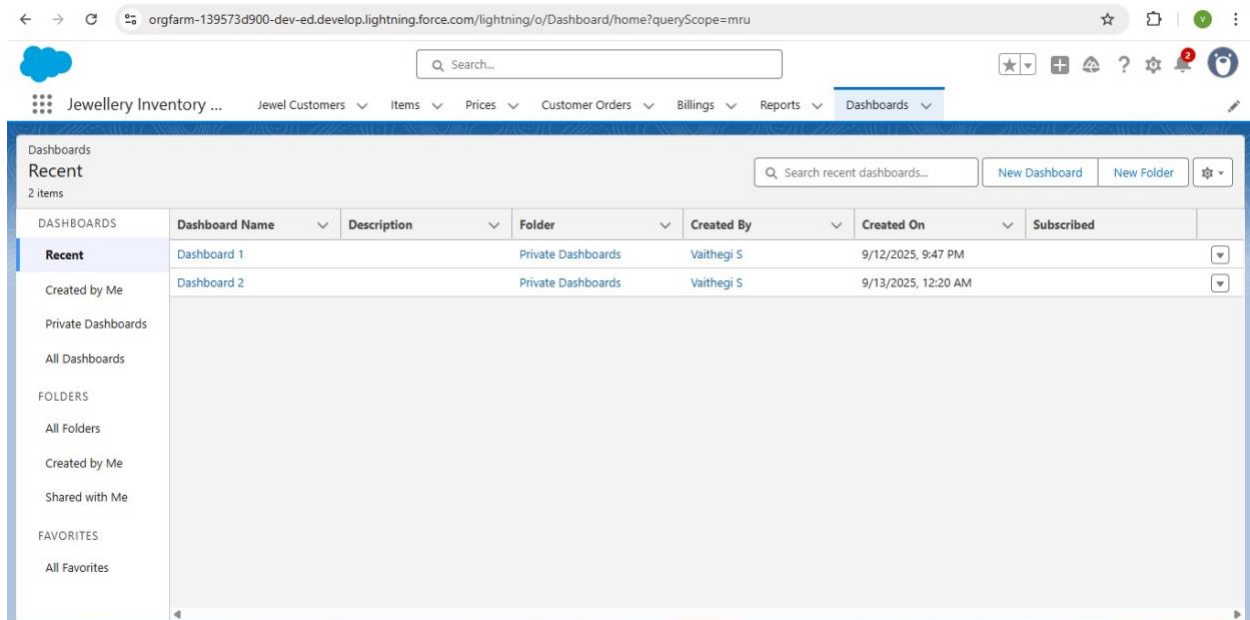
- Create User Adoption



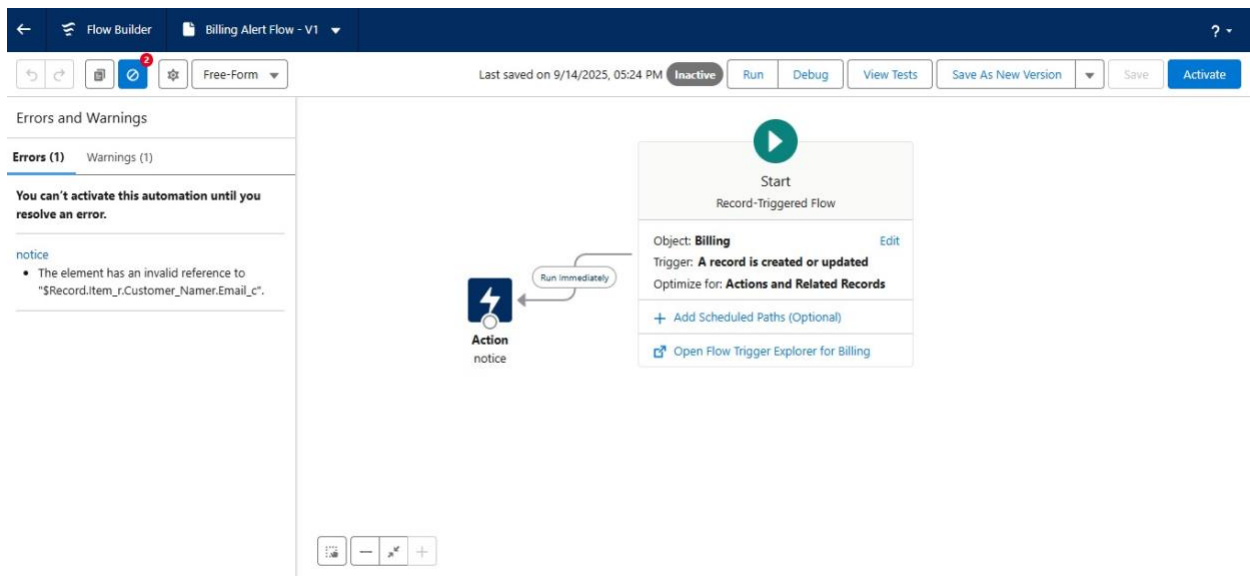
- Creating report



- Creating a dashboard



- Creating a flow



ADVANTAGES AND DISADVANTAGES

Advantages

- **Customer Tracking & Relationship**
 - Stores detailed information about each customer (purchase history, preferences, birthdays, anniversaries).
 - Helps in personalized offers (ex: recommending jewellery for weddings or festivals).
- **Sales & Marketing Automation**
 - Automatic reminders for follow-ups with customers.
 - Targeted marketing campaigns (SMS, email, WhatsApp promotions).
- **Inventory & Order Management**
 - Track stock of gold, diamond, silver items in real time.
 - Reduces mismatch between demand and availability.
- **Data Security & Transparency**
 - Safe record-keeping of customer invoices, transactions, and gold schemes.
 - Reduces manual errors in billing.
- **Customer Loyalty & Retention**
 - Easy to run loyalty programs, membership points, or festive discounts.
 - Increases repeat customers.
- **Analytics & Reporting**
 - Generates sales reports (best-selling items, seasonal demand).
 - Helps business owners make better decisions.

Disadvantages

- **High Initial Cost**
 - CRM setup in Salesforce requires licenses, customization, and training.
 - Small jewellery shops may find it expensive.
- **Training Requirement**
 - Employees need to learn how to use the system properly.
 - Without training, mistakes can happen.
- **Dependence on Internet & Technology**
 - If there is no internet or system downtime, transactions may get delayed.
- **Customization Challenges**
 - Jewellery business has unique needs (purity, weight, making charges, gold schemes).
 - Customizing Salesforce CRM for these can be time-consuming.
- **Data Privacy Concerns**
 - Customer personal data (ID proof, purchase history) is stored.
 - If not managed securely, risk of misuse or hacking.
- **Resistance to Change**
 - Traditional jewel shop owners may prefer manual billing/ledger.
 - Employees may resist adapting to CRM.

CONCLUSION

CRM-based Jewel Management in Salesforce plays a vital role in modernizing the jewellery business. It not only strengthens customer relationships through personalized services but also ensures transparency, efficiency, and data-driven decision-making. While challenges like high cost, training needs, and data security must be addressed, the overall advantages outweigh the drawbacks. By adopting CRM, jewellery businesses can improve customer loyalty, streamline inventory and sales, and stay competitive in today's digital market.

APPENDIX

Source Code: Provided in Apex Classes and Triggers

```
public class UpdatePaidAmountTriggerHandler {

    public static void handleBeforeInsert(List<Billing__c> newBillings) {

        for (Billing__c billing : newBillings) {

            billing.Paid_Amount__c = billing.Paying_Amount__c;

        }

    }

    public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap,
    List<Billing__c> updatedBillings) {

        for (Billing__c billing : updatedBillings) {

            Billing__c oldBilling = oldBillingsMap.get(billing.Id);

            Decimal oldPaidAmount = oldBilling.Paid_Amount__c;

            billing.Paid_Amount__c = oldPaidAmount + billing.Paying_Amount__c;

        }

    }

}
```

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