



CRM APPLICATION FOR JEWEL MANAGEMENT – (Developer)

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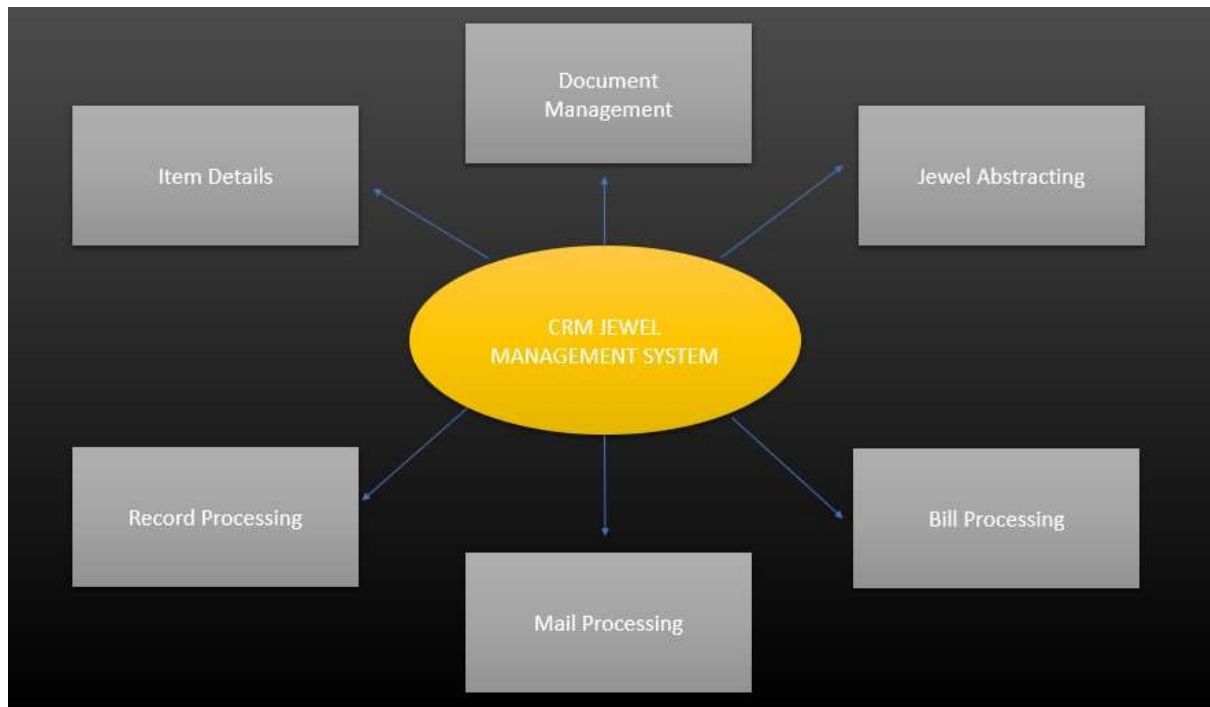
INTRODUCTION :

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.



PROJECT OVERVIEW :

The Jewel Inventory System is a comprehensive software Solution designed to streamline and manage the inventory and sales processes of a jewellery store or a jewellery manufacturer. The system aims to provide an efficient and user-friendly solution to track and control the inventory of various jewellery items, maintain accurate records, and facilitate seamless sales transactions.



PURPOSE :

Creating Developer Account :

By using URL -<https://developer.salesforce.com/signup>

The screenshot shows the Salesforce Developer Edition sign-up page. On the left, a dark blue banner features 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 six 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 of the banner is an illustration of an Agentforce robot. On the right, the sign-up form is displayed with the following fields and values: "First name" (Asina), "Last name" (P), "Job title" (Developer), "Work email" (asina200107@gmail), "Company" (Government Arts Co), and "Country/Region" (India). Below the form, there is a checkbox for "I agree to the Main Services Agreement -- Developer Services and Salesforce Program Agreement" and a note about the org being provisioned on or migrated to Hyperforce. At the bottom, it says "We value your privacy. To learn more, visit our Privacy Statement."

CREATION OF OBJECT :

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

Salesforce objects are of two types:

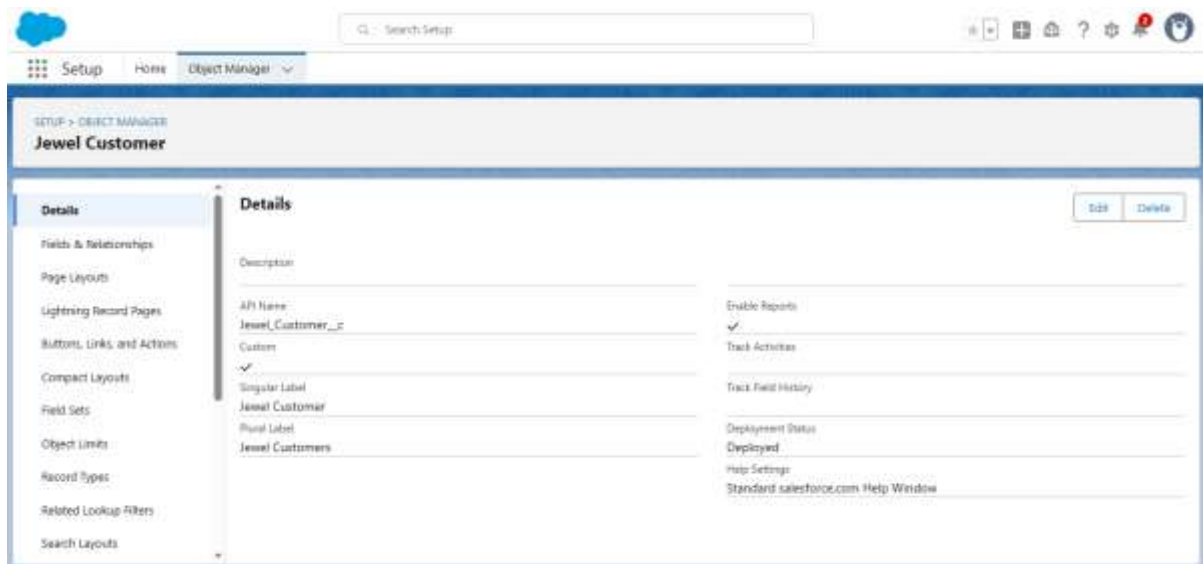
1. **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

The Required Objects :

- Jewel Customer Object
- Item Object

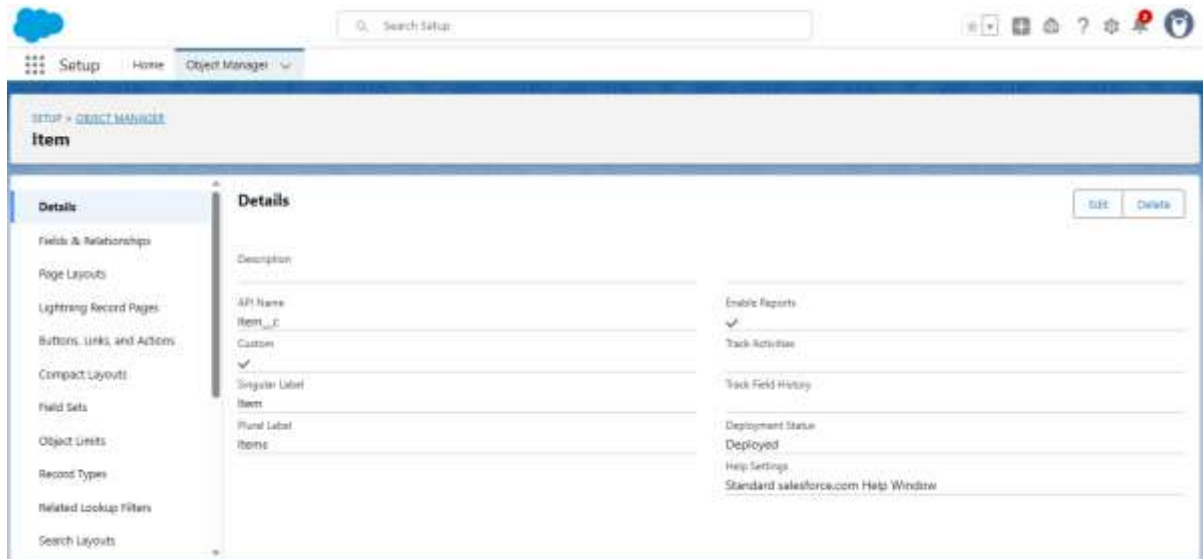
Jewel Customer Object :

The purpose of creating a Jewel Customer custom object is to store and manage information about Customer.



Item Object :

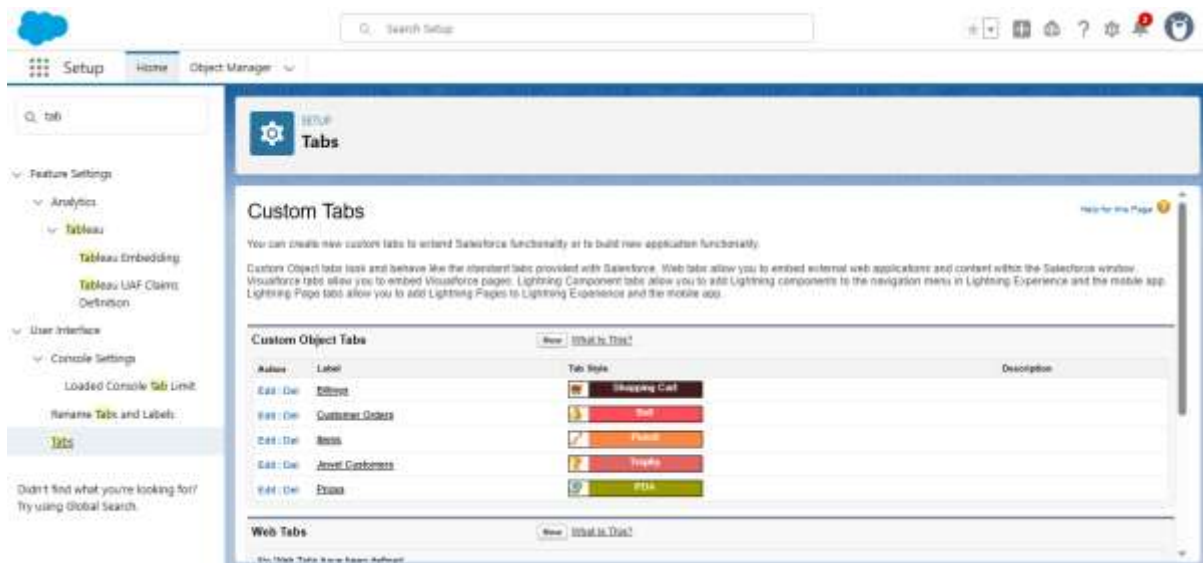
The purpose of creating a Item object is to manage the inventory of gold and silver items.



Both the Objects are Created Successfully .

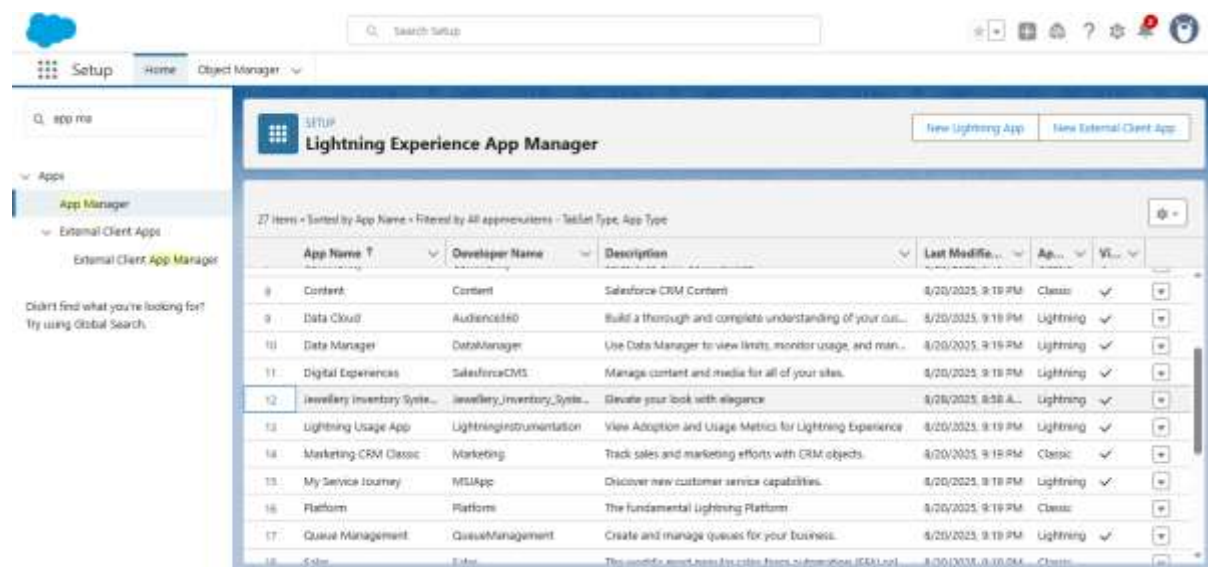
Creation of Tabs :

A tab is like a user interface that is used to build records for objects and to view the records in the objects.



Creation of the Lightning App :

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.



Creation of Fields :

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organiser or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

Jewel Customer Object Fields :

The screenshot shows the Salesforce Setup page for the Jewel Customer object. The left sidebar contains a list of setup 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 displays the Fields & Relationships section for the Jewel Customer object, showing 11 items sorted by Field Label. The table lists the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Country	Country__c	Text(16)		
Created By	CreatedBy	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		

The screenshot shows the Salesforce Setup page for the Jewel Customer object, displaying the Fields & Relationships section. The table lists the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Customer Name	Name	Text(80)		✓
Email	Email__c	Email		
Last Modified By	LastModifiedById	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(9)		

Item Object Fields :

The screenshot shows the Salesforce Setup page for the Item object. The left sidebar contains a list of setup 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 displays the Fields & Relationships section for the Item object, showing 23 items sorted by Field Label. The table lists the following fields:

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	
Sold Price	Sold_Price__c	Formula (Currency)		
Item Id	Name	Auto Number		✓
Item Type	Item_Type__c	Picklist		

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

Item

Details

Fields & Relationships

23 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

XDM	XDM__c	Formula (Currency)	
Last Modified By	LastModifiedById	Lookup(User)	
Making Charges	Making_Charges__c	Formula (Currency)	
Ornament	Ornament__c	Text(20)	
Owner	OwnerId	Lookup(User/Group)	✓
Percentage	Percentage__c	Number(2, 0)	
Prices	Prices__c	Lookup(Price)	✓
Priority	Priority__c	Rollup	

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

Item

Details

Fields & Relationships

23 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

Purity	Purity__c	Number(2, 0)	
Purity Gold Price	Purity_Gold_Price__c	Formula (Currency)	
Record Type	RecordTypeId	Record Type	✓
Silver Price	Silver_Price__c	Formula (Number)	
Stone Weight	Stone_Weight__c	Number(3, 3)	
Stone/Other Price	Stone_Other_Price__c	Currency(8, 2)	
Total Weight	Total_Weight__c	Formula (Number)	
Weight	Weight__c	Number(8, 3)	

Billing Object Fields

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

Billing

Details

Fields & Relationships

15 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

Making Charges	Making_Charges__c	Formula (Currency)	
Owner	OwnerId	Lookup(User/Group)	✓
Paid Amount	Paid_Amount__c	Currency(16, 0)	
Paying Amount	Paying_Amount__c	Currency(16, 0)	
Stone weight	Stone_weight__c	Formula (Number)	
Stone/other price	Stones_other_price__c	Formula (Currency)	
Total Amount	Total_Amount__c	Formula (Currency)	
Weight	Weight__c	Formula (Number)	

Setup > OBJECT MANAGER

Billing

Details

Fields & Relationships
13 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Billing Name	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)		

Setup > OBJECT MANAGER

Billing

Details

Fields & Relationships
18 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
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	Text (10)		
Owner	OwnerId	Lookup (User Group)		✓
Paid Amount	Paid_Amount__c	Currency (16, 0)		

original: 4647344725-dev-ed.sfdc.lightning.force.com/lightning/setup/home

Price Object Fields

Setup > OBJECT MANAGER

Price

Details

Fields & Relationships
6 Items, Sorted by Field Label

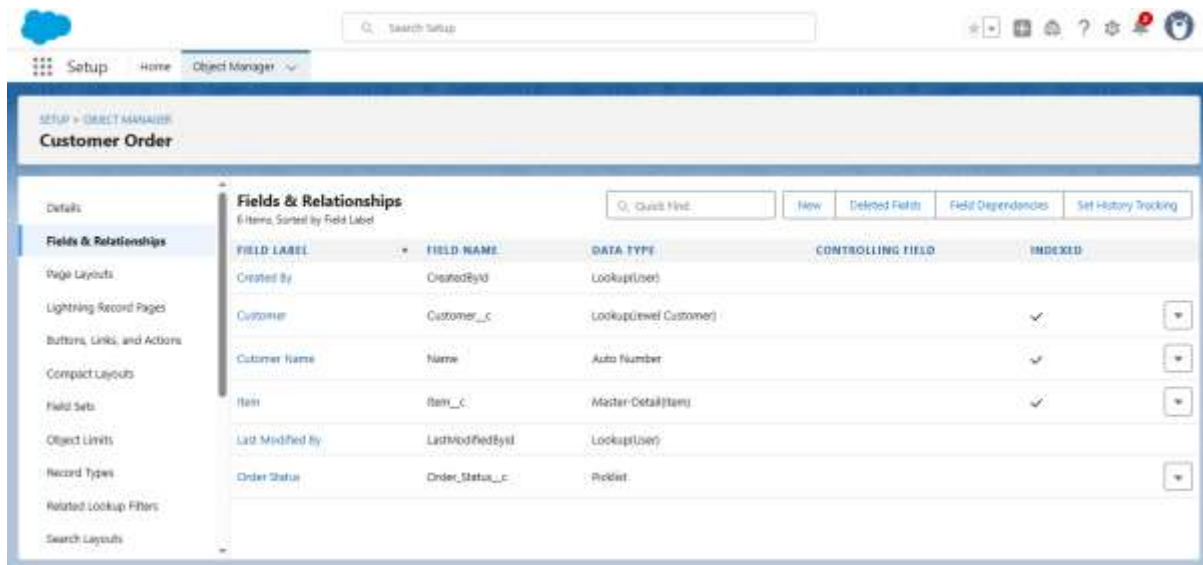
Quick Find

New Deleted Fields Field Dependencies Set History Tracking

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)		✓
Wipe Name	Name	Auto Number		✓
Silver Price	Silver_Price__c	Currency (8, 0)		

original: 4647344725-dev-ed.sfdc.lightning.force.com/lightning/setup/home

Customer Order Fields

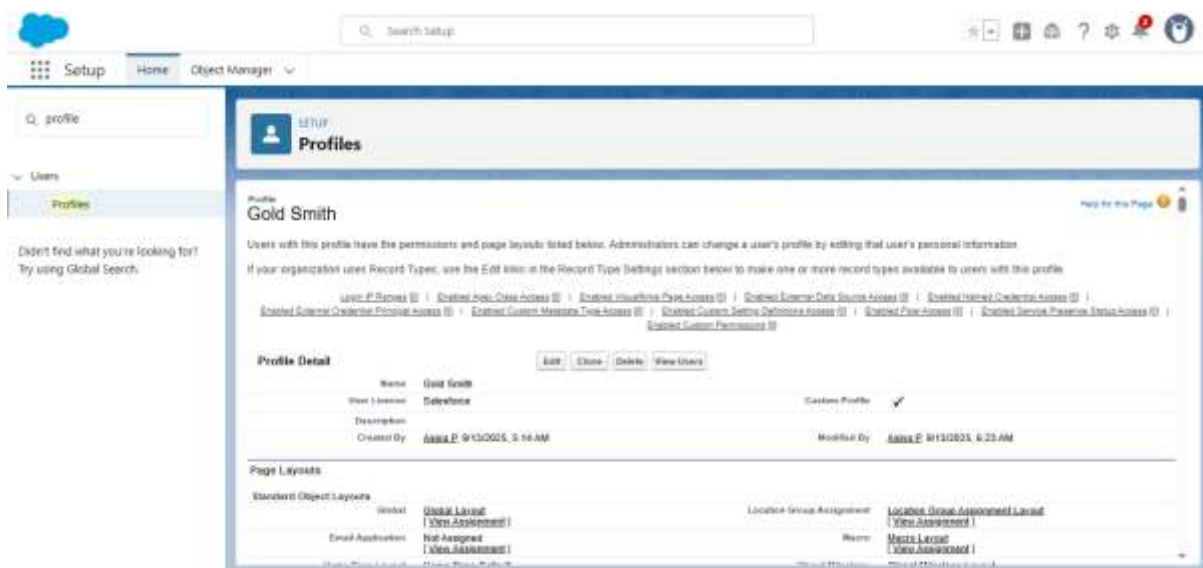


All the Required fields are created with their appropriate Object. Now , We can use these fields accordingly .

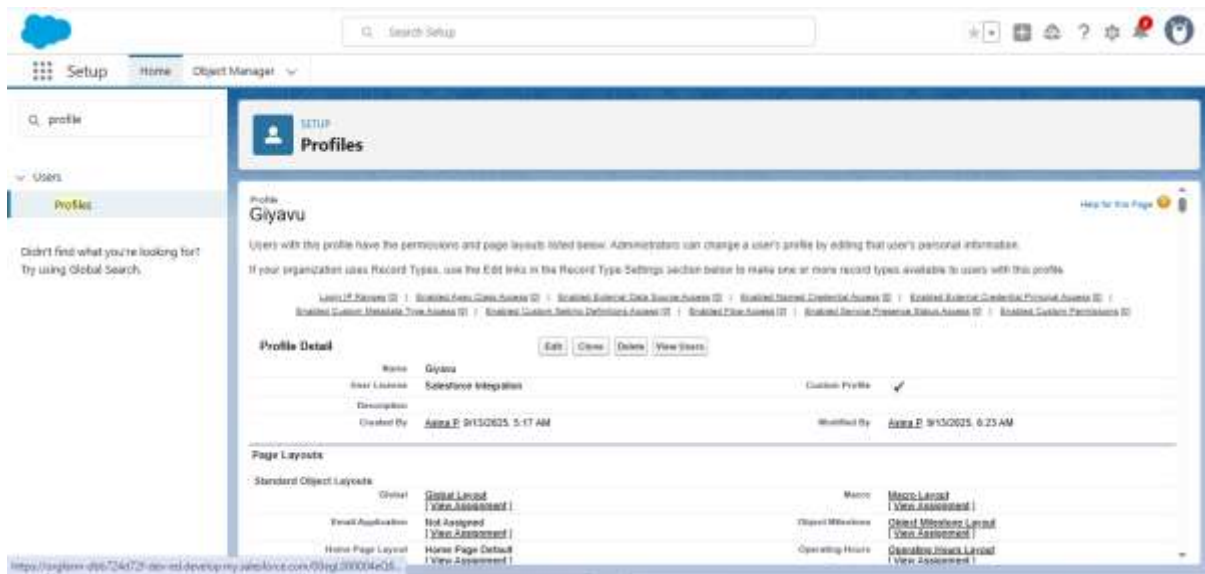
Creation of Profiles :

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

- Gold Smith Profile



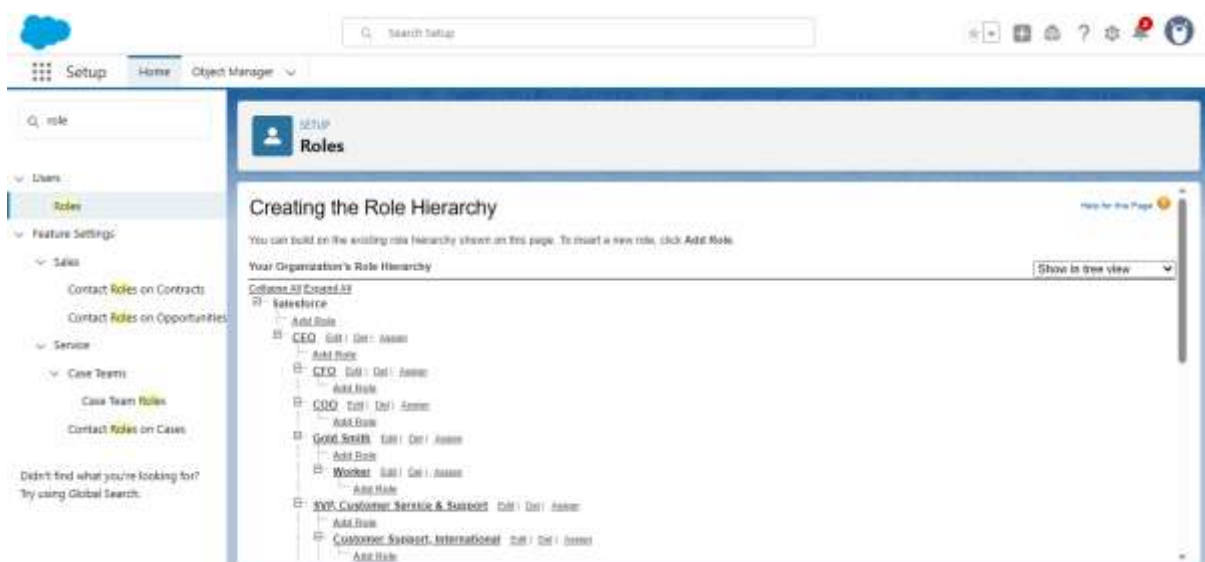
- Worker Profile



Creation of Roles

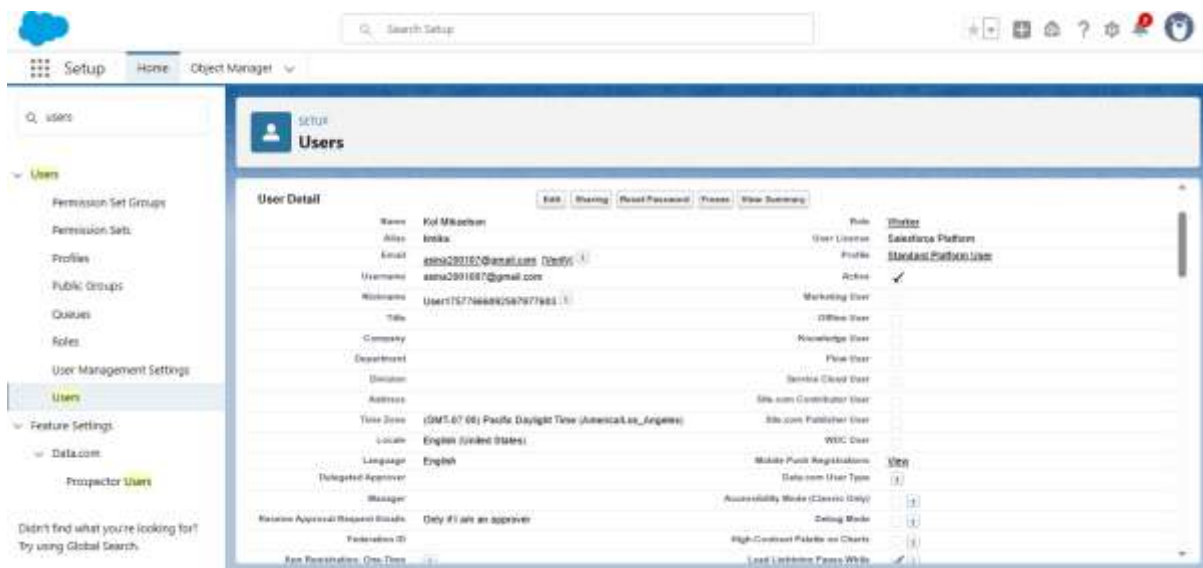
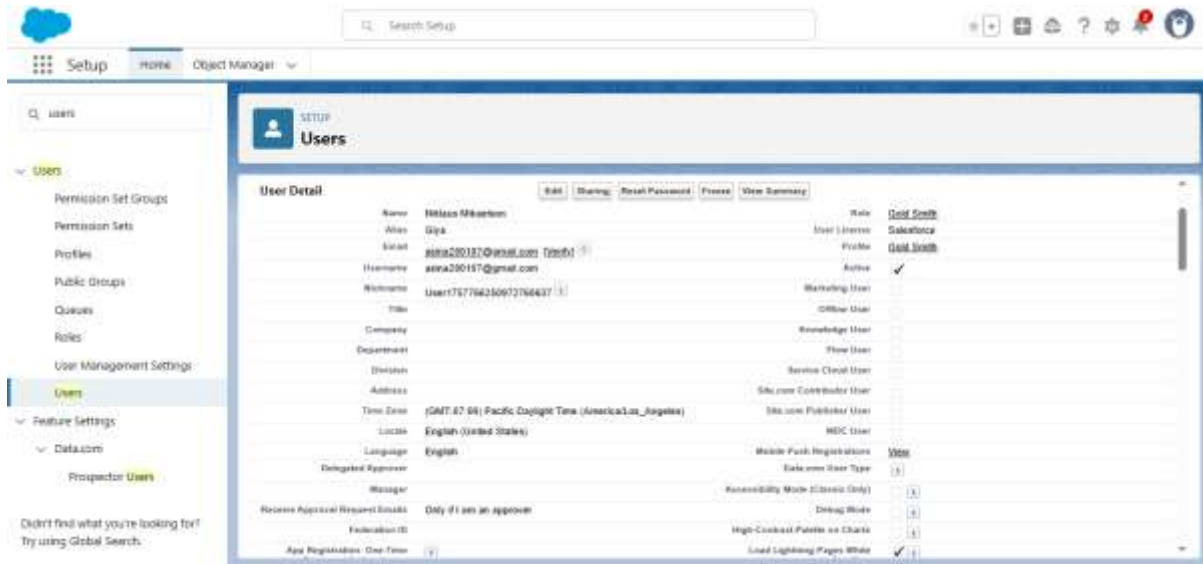
A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organisation can have to data. Simply put, it describes what a user could see within the Salesforce organisation.

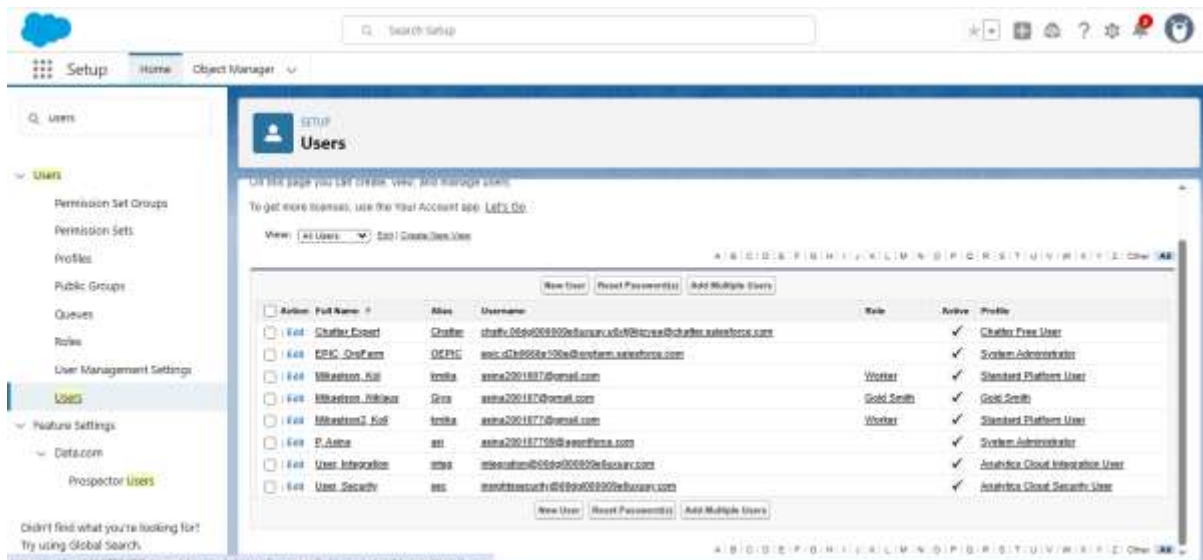
- Gold Smith
- Worker



Creation of Users :

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

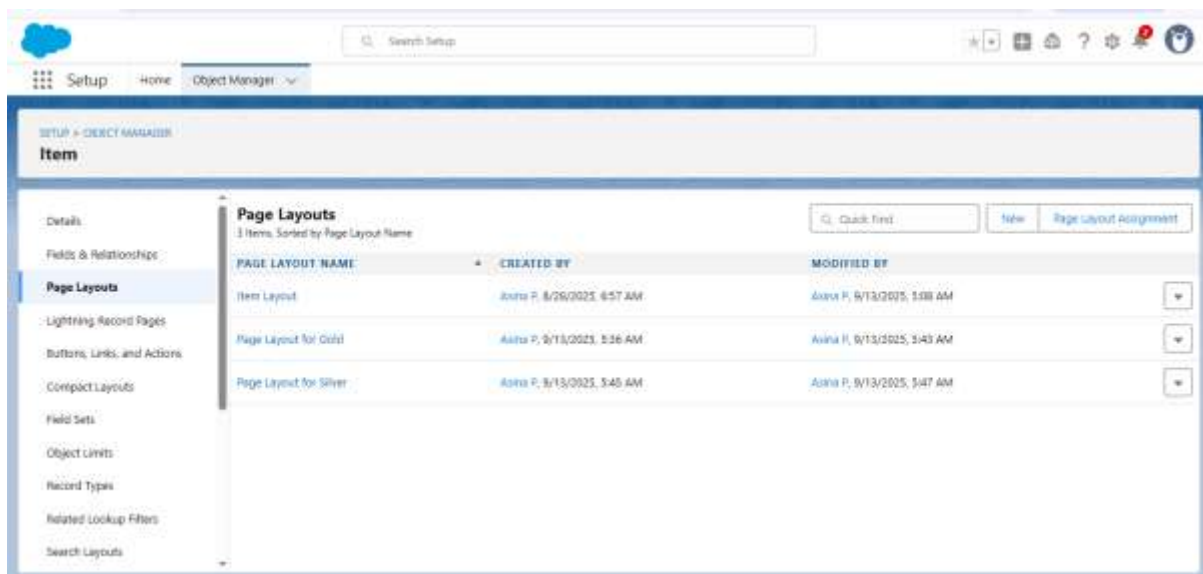




Creation of Page Layouts :

Page Layout in Salesforce allows us to customise the design and organise detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

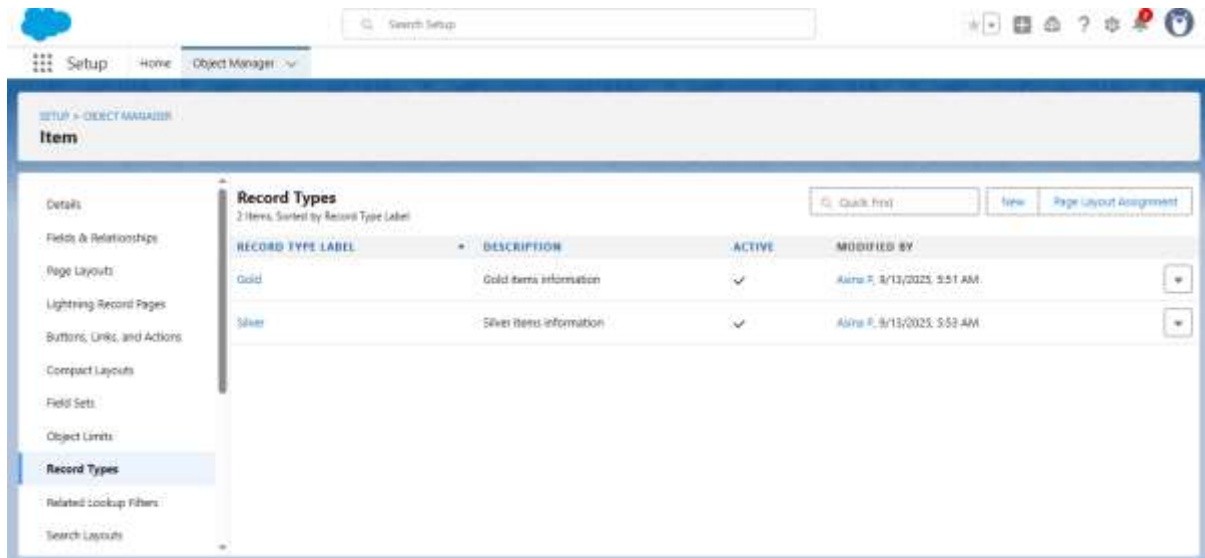
- Layout for Gold
- Layout for Silver



Creation of 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.

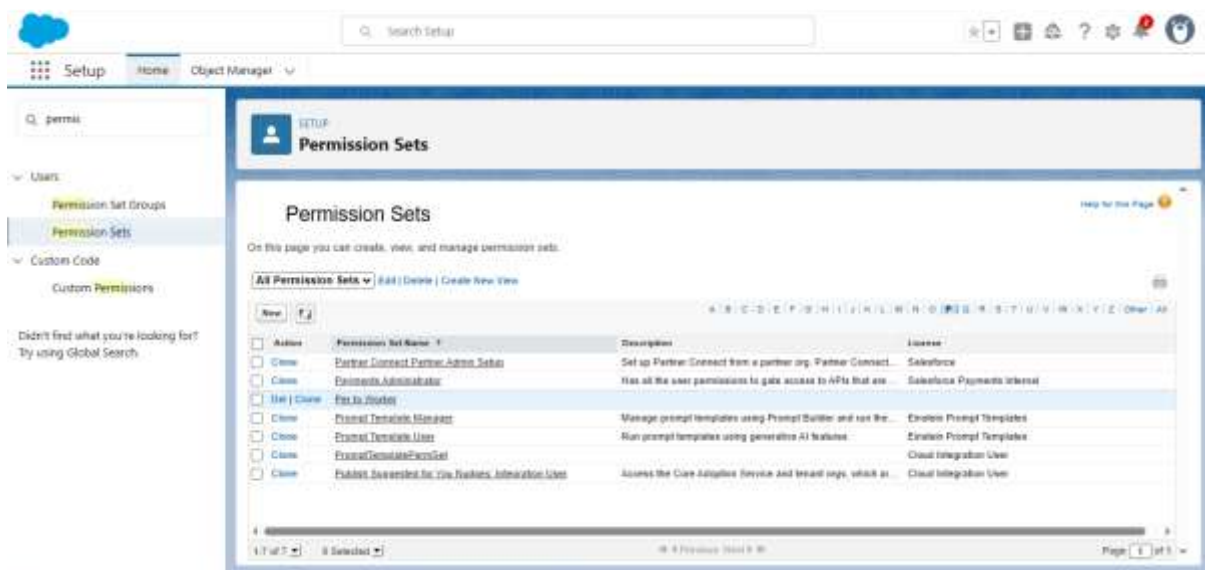
- Gold
- Silver



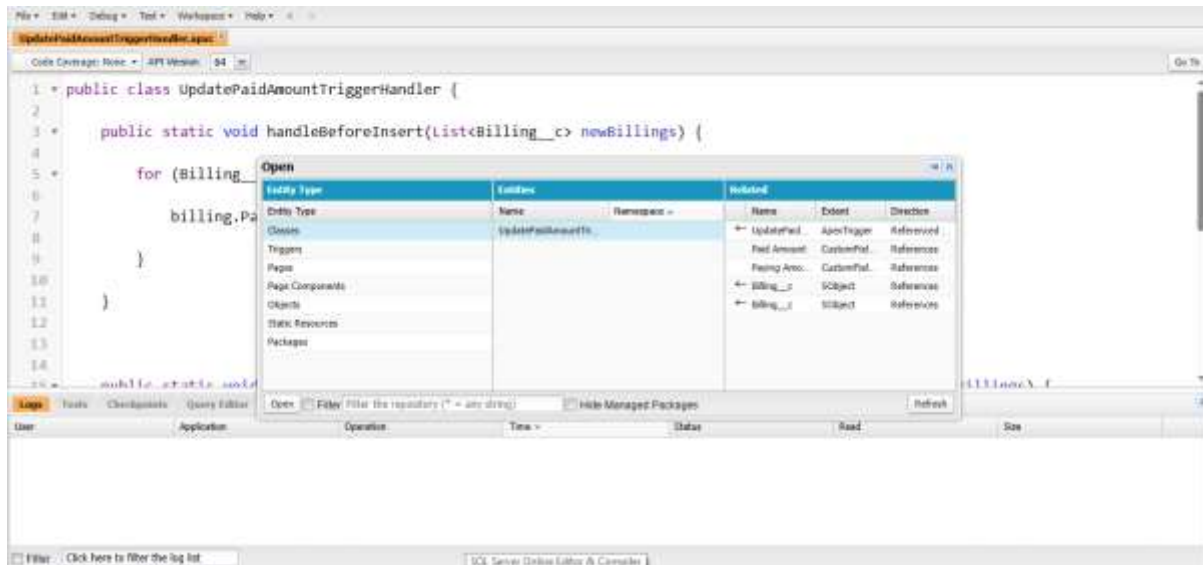
Creation of a Permission Set :

A standard permission set consists of a group of common permissions for a particular feature associated with a permission set licence. Using a standard permission set saves you time and facilitates administration because you don't need to create the custom permission set.

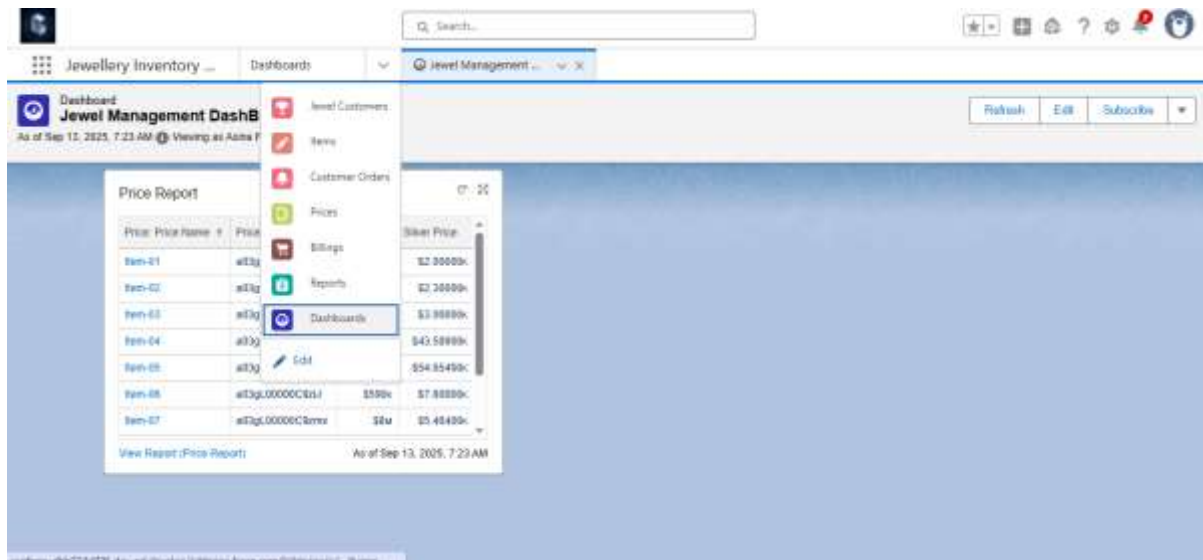
Per to Worker



Creation of Triggers :



User Adoption :



Jewellery Inventory ...

Jewel Customers

Jewel Management ...

New Jewel Customer

New Jewel Customer

* Required Information

Information

Customer Name

City

Phone

Email

State

Owner

Asna P

Cancel

Save & Home

Save

Jewellery Inventory ...

Dashboards

Jewel Management ...

Dashboard

Jewel Management DashBoard

As of Sep 13, 2025, 7:23 AM @ Viewing as Asna P

Refresh Edit Subscribe

Price Report

Price	Price Name	Price ID	Gold Price	Silver Price
Item-01	a03gLO9999C9V71	\$6k	\$2 00000k	
Item-02	a03gLO9999C9F1g	\$40k	\$2 10000k	
Item-03	a03gLO9999C9H1H	\$300k	\$3 00000k	
Item-04	a03gLO9999C9m1H	\$8k	\$43 58900k	
Item-05	a03gLO9999C9z2S	\$780k	\$54 85400k	
Item-06	a03gLO9999C9zUJ	\$590k	\$7 60000k	
Item-07	a03gLO9999C9zmv	\$0k	\$5 46400k	

View Report (Price Report) As of Sep 13, 2025, 7:23 AM

Jewellery Inventory ...

Dashboards

Jewel Management ...

Dashboard

Jewel Management DashBoard

As of Sep 13, 2025, 7:23 AM @ Viewing as Asna P

Refresh Edit Subscribe

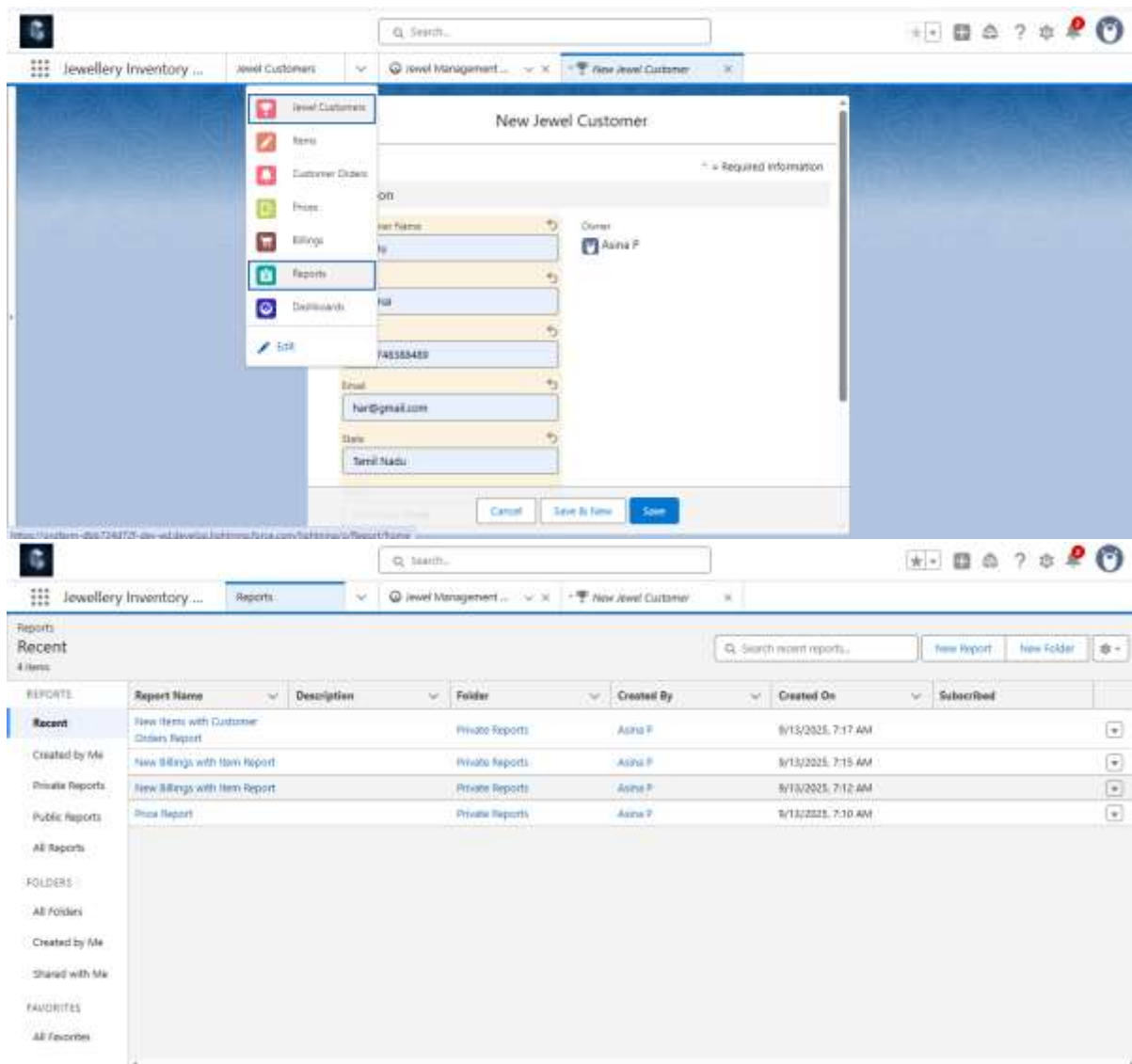
Price Report

Price	Price Name	Price ID	Gold Price	Silver Price
Item-04	a03gLO9999C9zmv	\$8k	\$43 58900k	
Item-05	a03gLO9999C9z2S	\$780k	\$54 85400k	
Item-06	a03gLO9999C9zUJ	\$590k	\$7 60000k	
Item-07	a03gLO9999C9zmv	\$0k	\$5 46400k	
Item-08	a03gLO9999C9H2S	\$850k	\$568 04000k	
Item-09	a03gLO9999C9zYD	\$78k	\$57 57500k	
Item-10	a03gLO9999C9zH5	\$0k	\$56 00000k	

View Report (Price Report) As of Sep 13, 2025, 7:23 AM

Creation of 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.



Creation of Dashboards :

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities.

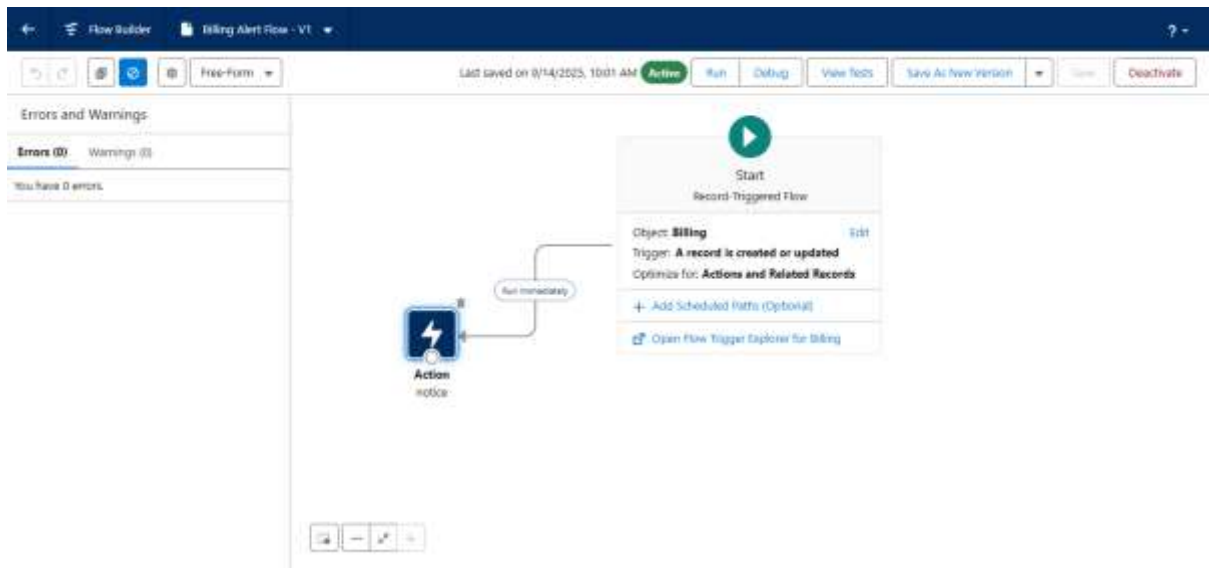
Item	Customer Order	Cuts	Expected Days	Q	RDM
Item-01	Item-07	-	-	\$590	\$12.5
Item-02	Item-08	-	-	\$4.50	\$10.18
Item-07	Item-08	-	1-3 Days	\$4.50	\$3.50
Item-07	Item-02	-	1-3 Days	\$4.50	\$3.50
Item-07	Item-05	-	1-3 Days	\$4.50	\$3.50
Item-07	Item-08	-	1-3 Days	\$4.50	\$3.50
Item-08	Item-01	-	1-3 Days	\$4.50	\$31.50

Creation of Flow :

In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Billing Alert Flow :

Flow Label	Triggering Object	Trigger	Action	Last Modified	Last Run	Package State	Flow ID
Billing	Billing	Record—Run After Sa...		9/18/2025, 7:42 PM	Asina P	Unmanaged	
Billing Alert Flow	Billing	Record—Run After Sa...		9/18/2025, 8:46 PM	Asina P	Unmanaged	
Create Order Summary Flow	Order	Record—Run After Sa...				Managed—Installed	



FUNCTIONAL AND PERFORMANCE TESTING :

- **Performance Testing:**

Trigger validation by entering duplicate values for records.

The screenshot shows a web application interface for 'Jewellery Inventory ...'. A search bar at the top contains the text 'Search...'. Below the search bar, a tabbed interface shows 'Jewel Customers' as the active tab, with a sub-tab for 'New Jewel Customer'. The main content area displays a form for creating a new customer. The form fields are: City (Chennai), Phone (225660767), Email (anu), State (Tamil Nadu), Street (4Th Cross Street), Country (India), and Zip/Postal code (641010). The Email field is highlighted with a red border and a red error message: 'Enter a valid email address, such as name@email.com'. At the bottom of the form are three buttons: 'Cancel', 'Save & New', and 'Save'.

- Validation Rule Checking

New Price

* = Required information

Information

Price Name

Owner

Asma P

Gold Price

\$45,900

Enter a valid numeric value.

Silver Price

Cancel Save & New Save

New Billing

* = Required information

Information

Billing Name

Owner

Asma P

Item

11

Select an option from the picklist or remove the search term.

Paying Amount

Paid Amount

Email

Cancel Save & New Save

New Customer Order

* = Required information

Information

Customer Name

Customer

1st

Select an option from the picklist or remove the search term.

Item

Search item...

Order Status

None

Cancel Save & New Save

Search...

Jewellery Inventory ... Customer Orders Brinda (J... Abdi Rah... Charani (J... Pavitra (J... New Customer... More

New Customer Order

Required Information

Information

Customer Name

Customer

fat

Select an option from the picklist or remove the search term.

Item

S46

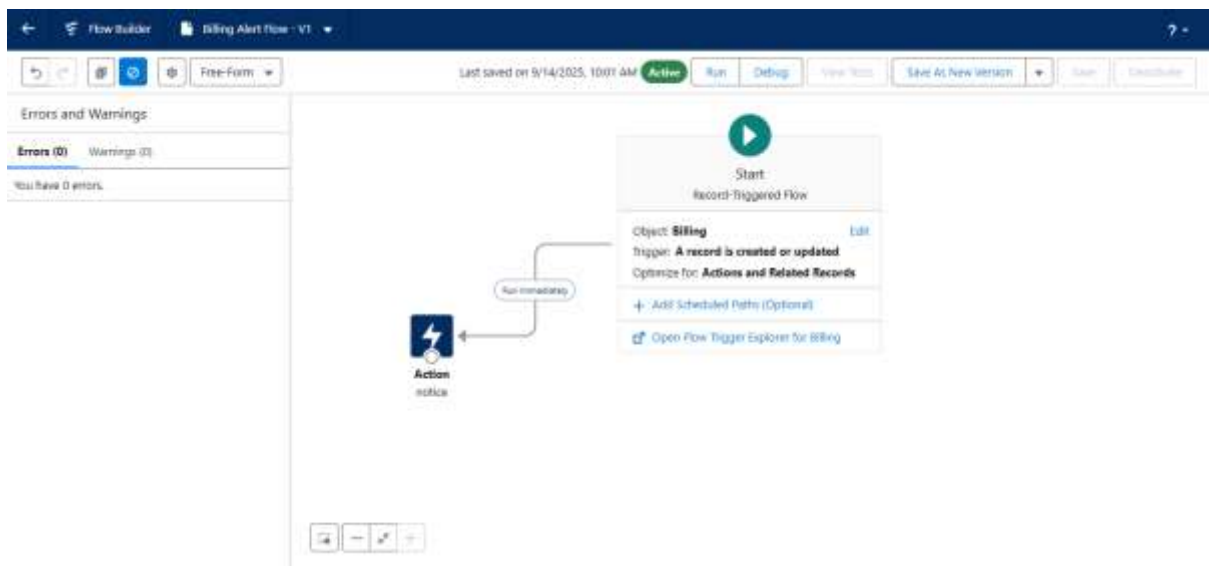
Select an option from the picklist or remove the search term.

Order Status

--None--

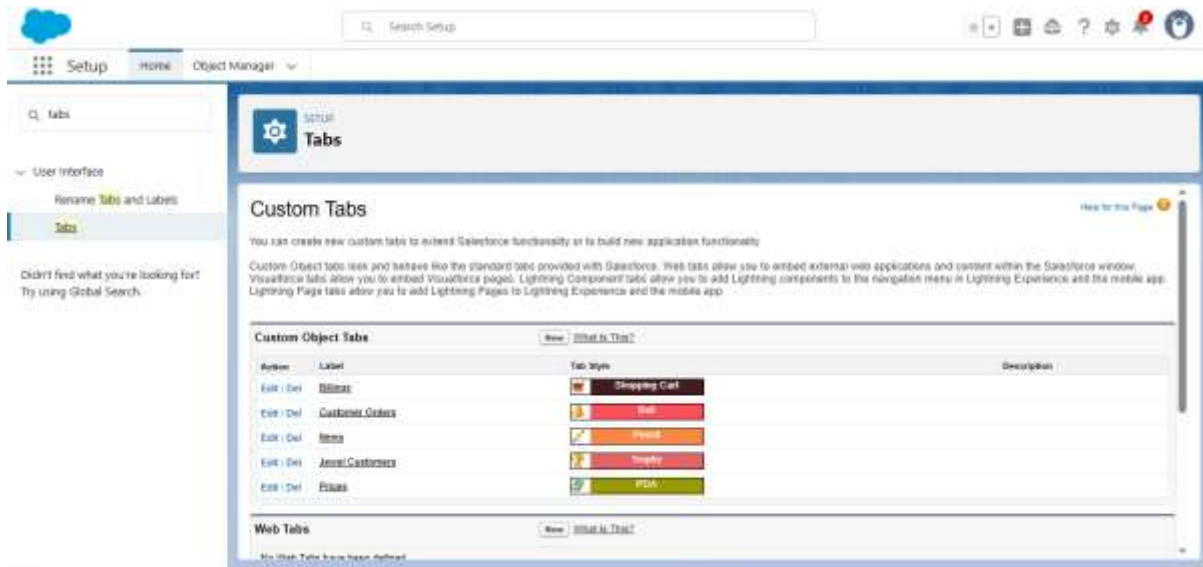
Cancel Save & New Save

- Flow Activation Checking

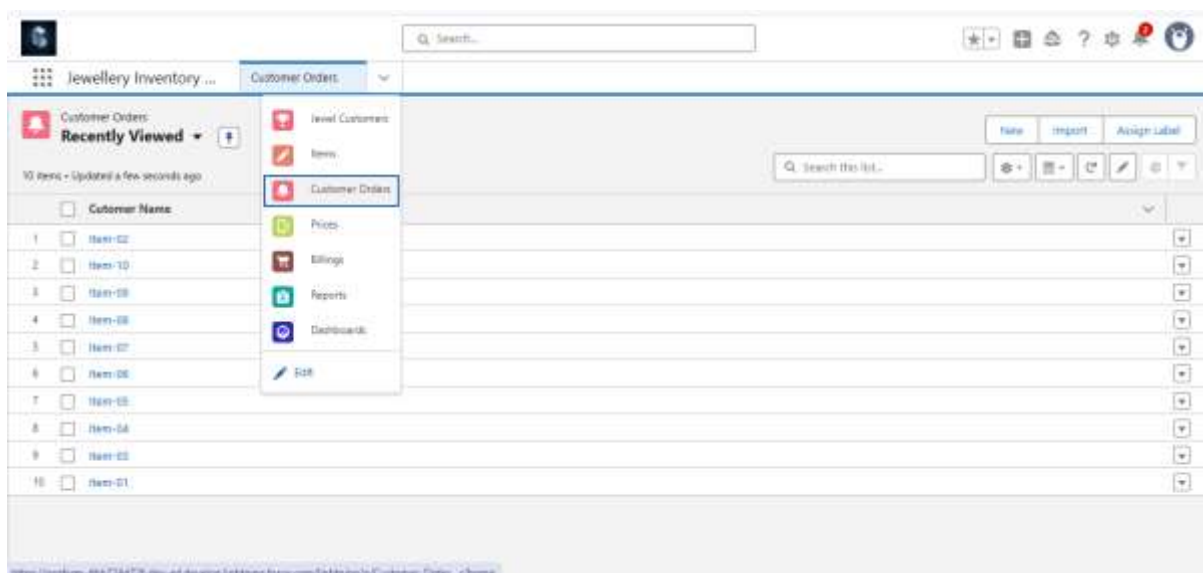


RESULT :

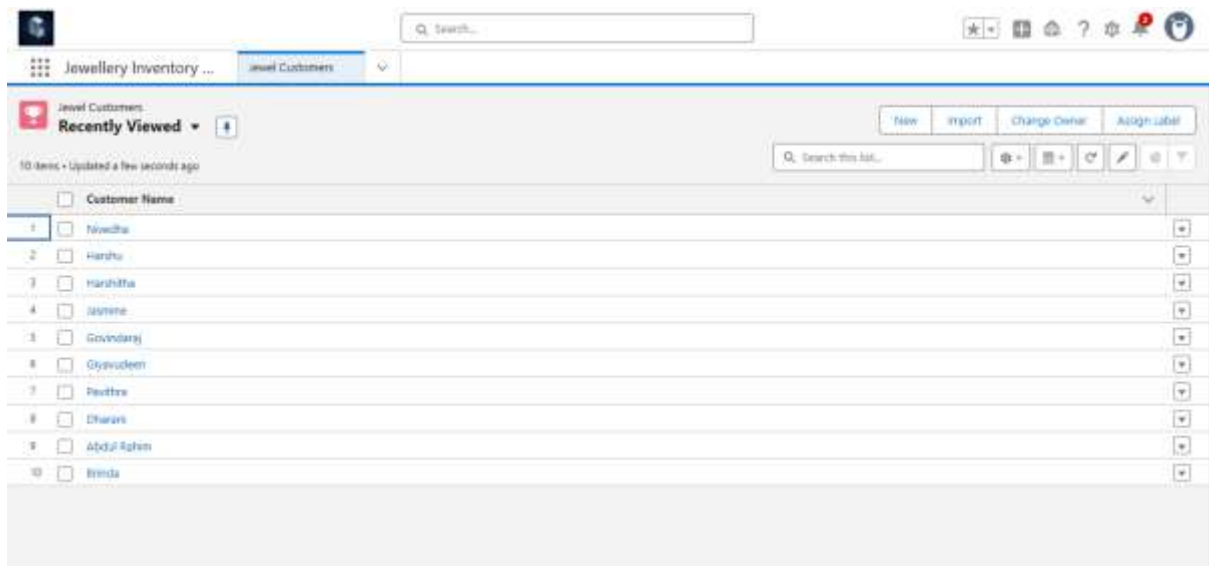
Tabs are Created Successfully



Required Object are Created Successfully



Records Created Successfully



Jewellery Inventory ... **Jewel Customers**

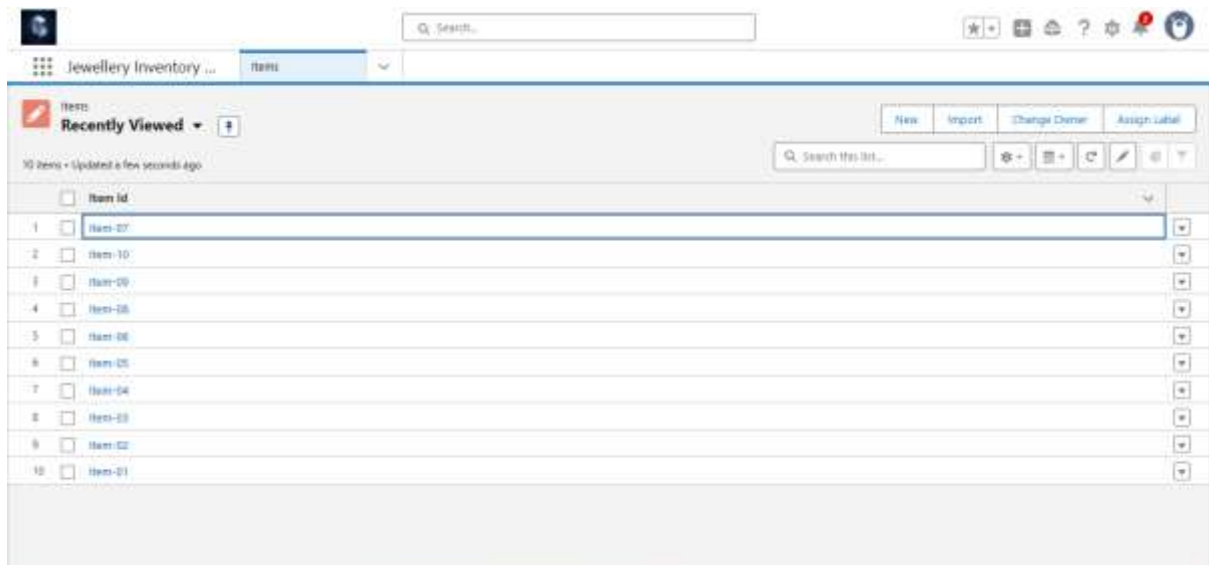
Search...

New Import Change Owner Assign Label

Search this list...

10 items • Updated a few seconds ago

	<input type="checkbox"/> Customer Name	
1	<input type="checkbox"/> Nivedha	
2	<input type="checkbox"/> Harsha	
3	<input type="checkbox"/> Harshitha	
4	<input type="checkbox"/> Jaylene	
5	<input type="checkbox"/> Govindaraj	
6	<input type="checkbox"/> Gyanudeen	
7	<input type="checkbox"/> Preethe	
8	<input type="checkbox"/> Dharam	
9	<input type="checkbox"/> Abdul Rahim	
10	<input type="checkbox"/> Brinda	



Jewellery Inventory ... **Items**

Search...

New Import Change Owner Assign Label

Search this list...

10 items • Updated a few seconds ago

	<input type="checkbox"/> Item Id	
1	<input type="checkbox"/> Item-07	
2	<input type="checkbox"/> Item-10	
3	<input type="checkbox"/> Item-09	
4	<input type="checkbox"/> Item-08	
5	<input type="checkbox"/> Item-06	
6	<input type="checkbox"/> Item-05	
7	<input type="checkbox"/> Item-04	
8	<input type="checkbox"/> Item-03	
9	<input type="checkbox"/> Item-02	
10	<input type="checkbox"/> Item-01	

Jewellery Inventory ...

Customer Orders

Search...

Star

Grid

Print

Help

Settings

Notifications

Profile

Customer Orders

Recently Viewed

New

Import

Assign Label

10 items • Updated a few seconds ago

Search this list...

Filter

Sort

Refresh

Edit

More

	<input type="checkbox"/>	Customer Name	
1	<input type="checkbox"/>	Item-02	
2	<input type="checkbox"/>	Item-10	
3	<input type="checkbox"/>	Item-09	
4	<input type="checkbox"/>	Item-08	
5	<input type="checkbox"/>	Item-07	
6	<input type="checkbox"/>	Item-06	
7	<input type="checkbox"/>	Item-05	
8	<input type="checkbox"/>	Item-04	
9	<input type="checkbox"/>	Item-03	
10	<input type="checkbox"/>	Item-01	

localhost:3000?dev=stalevalue&token=token.com&token=token.com&token=token.com

Jewellery Inventory ...

Prices

Search...

Star

Grid

Print

Help

Settings

Notifications

Profile

Prices

Recently Viewed

New

Import

Change Owner

Assign Label

10 items • Updated a few seconds ago

Search this list...

Filter

Sort

Refresh

Edit

More

	<input type="checkbox"/>	Price Name	
1	<input type="checkbox"/>	Item-10	
2	<input type="checkbox"/>	Item-09	
3	<input type="checkbox"/>	Item-08	
4	<input type="checkbox"/>	Item-07	
5	<input type="checkbox"/>	Item-06	
6	<input type="checkbox"/>	Item-05	
7	<input type="checkbox"/>	Item-04	
8	<input type="checkbox"/>	Item-03	
9	<input type="checkbox"/>	Item-02	
10	<input type="checkbox"/>	Item-01	

Jewellery Inventory ...

Billings

Search...

Star

Grid

Print

Help

Settings

Notifications

Profile

Billings

Recently Viewed

New

Import

Change Owner

Assign Label

10 items • Updated a few seconds ago

Search this list...

Filter

Sort

Refresh

Edit

More

	<input type="checkbox"/>	Billing Name	
1	<input type="checkbox"/>	Item-10	
2	<input type="checkbox"/>	Item-09	
3	<input type="checkbox"/>	Item-08	
4	<input type="checkbox"/>	Item-07	
5	<input type="checkbox"/>	Item-06	
6	<input type="checkbox"/>	Item-05	
7	<input type="checkbox"/>	Item-04	
8	<input type="checkbox"/>	Item-03	
9	<input type="checkbox"/>	Item-02	
10	<input type="checkbox"/>	Item-01	

Reports Created Successfully

The screenshot shows the 'Reports' section of a software interface. At the top, there is a search bar labeled 'Search...' and a navigation bar with 'Jewellery Inventory ...' and 'Reports'. Below the navigation bar, the 'Reports' section is titled 'Recent' and shows a list of 4 items. The list is organized into columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The first item is 'New Items with Customer Orders Report' by 'Ashu P' on '9/13/2025, 7:17 AM'. The second item is 'New Settings with Item Report' by 'Ashu P' on '9/13/2025, 7:15 AM'. The third item is 'New Settings with Item Report' by 'Ashu P' on '9/13/2025, 7:12 AM'. The fourth item is 'Price Report' by 'Ashu P' on '9/13/2025, 7:10 AM'. On the left side, there are navigation links for 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', 'FAVORITES', and 'All Favorites'.

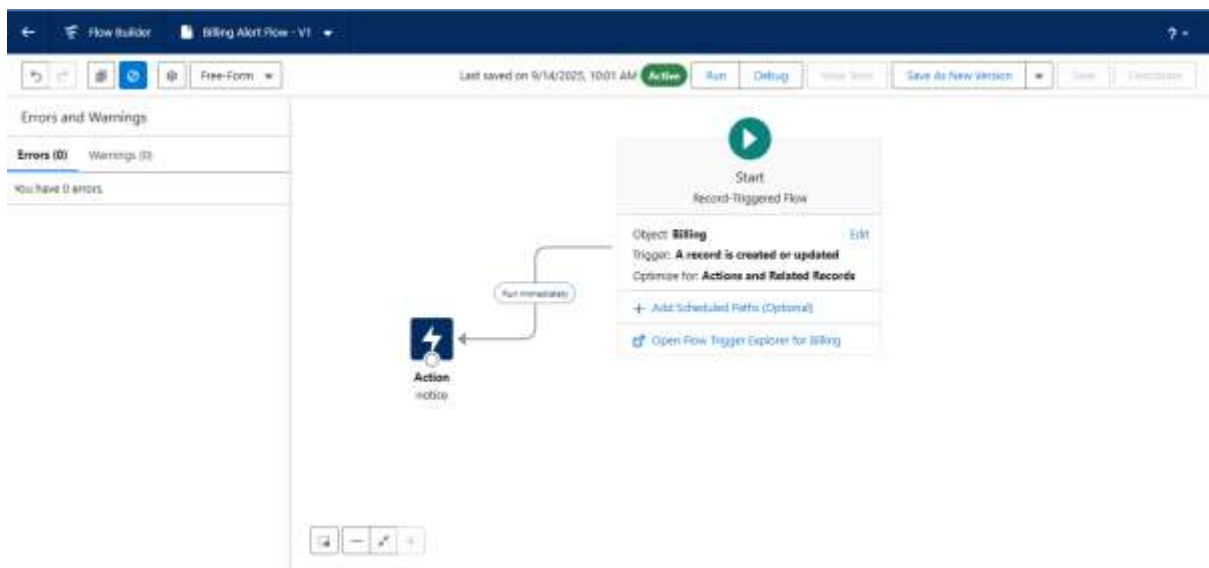
Report Name	Description	Folder	Created By	Created On	Subscribed
New Items with Customer Orders Report		Private Reports	Ashu P	9/13/2025, 7:17 AM	
New Settings with Item Report		Private Reports	Ashu P	9/13/2025, 7:15 AM	
New Settings with Item Report		Private Reports	Ashu P	9/13/2025, 7:12 AM	
Price Report		Private Reports	Ashu P	9/13/2025, 7:10 AM	

Dashboard Created Successfully

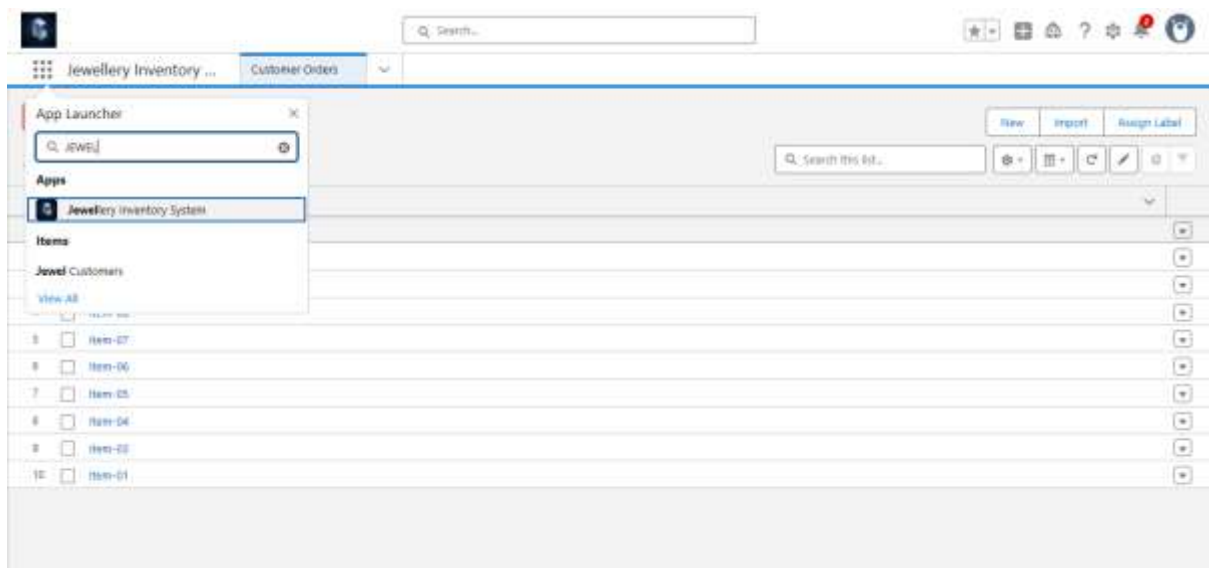
The screenshot shows the 'Dashboards' section of a software interface. At the top, there is a search bar labeled 'Search...' and a navigation bar with 'Jewellery Inventory ...' and 'Dashboards'. Below the navigation bar, the 'Dashboards' section is titled 'Recent' and shows a list of 2 items. The list is organized into columns: Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. The first item is 'Jewel Management Dashboard' by 'Ashu P' on '9/13/2025, 7:16 AM'. The second item is 'Jewel Management' by 'Ashu P' on '9/13/2025, 7:23 AM'. On the left side, there are navigation links for 'Recent', 'Created by Me', 'Private Dashboards', 'All Dashboards', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', 'FAVORITES', and 'All Favorites'.

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Jewel Management Dashboard		Private Dashboards	Ashu P	9/13/2025, 7:16 AM	
Jewel Management		Private Dashboards	Ashu P	9/13/2025, 7:23 AM	

Flow Created successfully



App Created Successfully



ADVANTAGES AND DISADVANTAGES

ADVANTAGES :

1. Centralized Customer & Inventory Data

- All **customer, sales, and jewelry inventory data** is stored in one place.
- Real-time visibility of customer purchase history, preferences, and trends.

2. Personalization & Customer Engagement

- Salesforce CRM tools allow **targeted offers, loyalty programs, and personalized recommendations**.
- Helps jewelers improve repeat purchases and maintain long-term customer relationships.

3. Cloud-Based & Accessible Anywhere

- Being in Salesforce, the system is **accessible on mobile, tablet, or desktop**.
- Ideal for jewelers with multiple branches or sales teams on the move.

4. Automation of Business Processes

- Automates tasks like **billing, reminders for maintenance/cleaning services, order tracking, vendor communication**, etc.
- Reduces manual errors and improves efficiency.

5. Powerful Analytics & Reporting

- Dashboards provide insights on **best-selling products, seasonal demand, stock shortages, and customer lifetime value**.
- Supports data-driven decision-making.

6. Integration Capabilities

- Can integrate with **POS, accounting software, ERP, and e-commerce platforms**.
- Ensures smooth operations across online and offline sales channels.

7. Scalability

- Salesforce scales easily as the jewelry business grows (adding more users, branches, or product lines).

DISADVANTAGES :

1. High Cost

- Salesforce licensing, customization, and consultant fees can be **expensive for small jewelers**.
- Ongoing subscription costs may add up.

2. Customization Complexity

- Jewel management requires **specialized workflows (gold weight, gemstone tracking, hallmarking, repairs, etc.)**.
- Heavy customization in Salesforce can be time-consuming and costly.

3. Training Requirement

- Staff need **proper training** to use Salesforce effectively.
- Without adoption, the CRM may not deliver full value.

4. Dependency on Internet

- As it's cloud-based, a **stable internet connection** is necessary.
- Downtime or poor connectivity can disrupt operations.

5. Data Migration Challenges

- Shifting legacy jewelry data (old invoices, customer history, stock details) into Salesforce can be **complex and error-prone**.

6. Possible Overhead for Small Businesses

- For a small, single-store jeweler, Salesforce might feel like **overkill** compared to lighter, cheaper solutions.

CONSLUSION :

The Salesforce-based CRM Jewel Management System delivers a strategic advantage to jewelers by streamlining operations, personalizing customer engagement, and enabling smarter business insights. While implementation may require investment and training, the system's scalability and powerful tools ensure sustainable growth and improved customer satisfaction. For businesses aiming to modernize and expand, this solution offers a strong foundation for future success.

APPENDIX :

Source Code : Provided in Apex Classes and Triggers

Class Name : UpdatePaidAmountTriggerHandler

```
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;  
        }  
    }  
}
```

