

PROJECT TITLE:

CRM APPLICATIONS FOR JEWEL MANAGEMENT

College Name: Sri Krishna Adithya College of Arts and Science

College Code: BRUAG

(DEVELOPERS)

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1.INTRODUCTION

1.1 Project Overview

CRM Jewel Management is a Salesforce-based Customer Relationship Management system specifically designed for jewelry businesses. The project aims to streamline sales, inventory, customer interactions, and service management in the jewelry industry. It provides jewelers with a centralized platform to manage customer data, sales orders, billing, repairs, and loyalty programs.

1.2 Purpose

- Maintain complete customer profiles with purchase history.
- Manage jewelry inventory including stock, categories, and availability.
- Automate billing and invoicing.
- Track repairs, services, and custom orders.
- Provide detailed sales and inventory reports for business insights.

DEVELOPMENT PHASE

Milestone 1: Creating Developer Account

Creating Developer Account:

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

Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

Sign up for your Developer Edition.

- ✓ 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
- ✓ Integrate with anything using APIs

Sign up for your Developer Edition
A free Salesforce Platform environment with Agentforce and Data Cloud

First name: Bipinraj ✓ Last name: G ✓

Job title: Student ✓ Work email: 23bcs114bipinrajg@ ✓

Company: Sri Krishna Adithya Co. ✓ Country/Region: India ✓

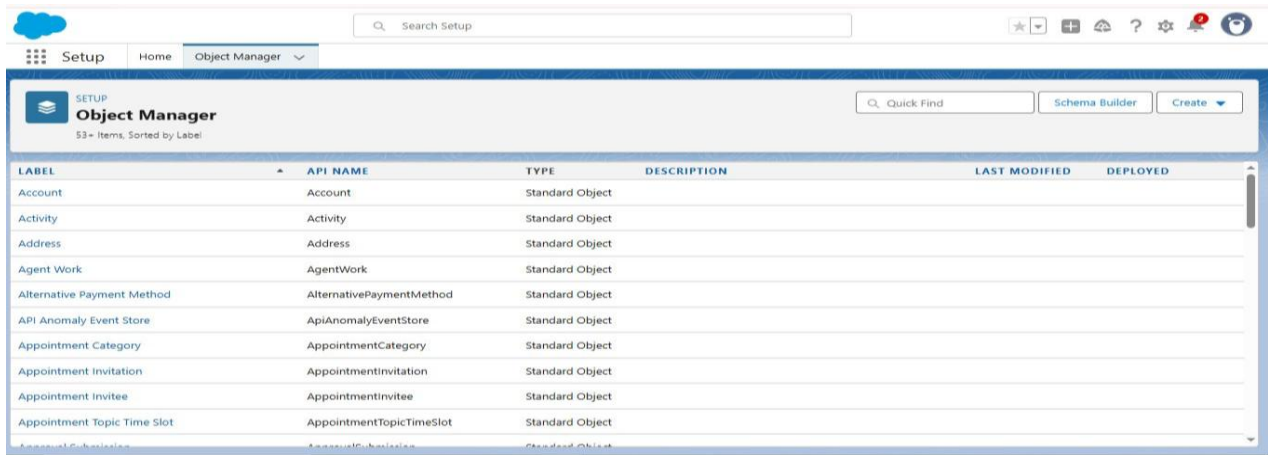
Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud Infrastructure.

☒ 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.

1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

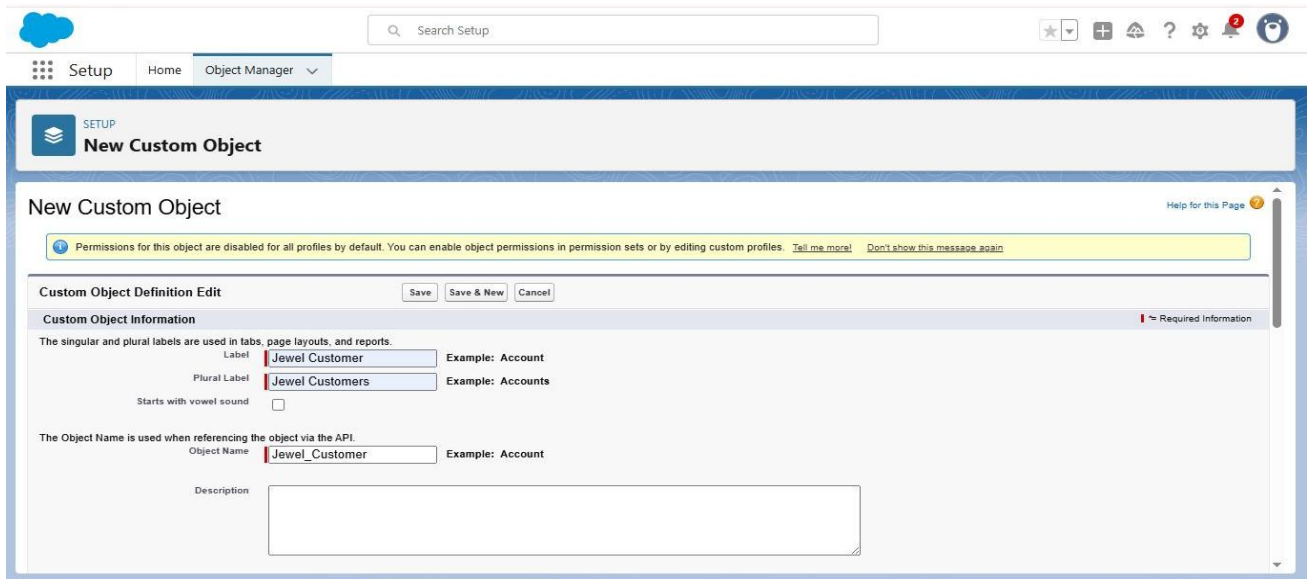
Milestone 2: Creating Objects

Create Object:



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. Below the navigation bar, the 'Object Manager' section is active, displaying a list of 53 items sorted by label. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The visible rows include Account, Activity, Address, Agent Work, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, and Appointment Topic Time Slot.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Address	Address	Standard Object			
Agent Work	AgentWork	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			



The screenshot shows the 'New Custom Object' form in Salesforce. The form is titled 'New Custom Object' and includes a 'Help for this Page' link. A message states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)'. Below the message, there are 'Save', 'Save & New', and 'Cancel' buttons. The 'Custom Object Definition Edit' section is active, showing 'Custom Object Information'. The form includes fields for 'Label' (Jewel Customer), 'Plural Label' (Jewel Customers), 'Object Name' (Jewel_Customer), and 'Description'. Examples are provided for each field: 'Example: Account' for Label, 'Example: Accounts' for Plural Label, and 'Example: Account' for Object Name. A 'Starts with vowel sound' checkbox is also present.

Custom Object Definition Edit [Save] [Save & New] [Cancel]

Custom Object Information ! Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label: Example: Account

Plural Label: Example: Accounts

Starts with vowel sound: ☐

The Object Name is used when referencing the object via the API.

Object Name: Example: Account

Description:

Create Jewel Customer Object

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

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

1. Enter the label name: Jewel Customer
2. Plural label name : Jewel Customers
3. Enter Record Name Label and Format
4. Record Name >>
5. Customer name
6. Data Type >> Text

Create Another Item Object

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

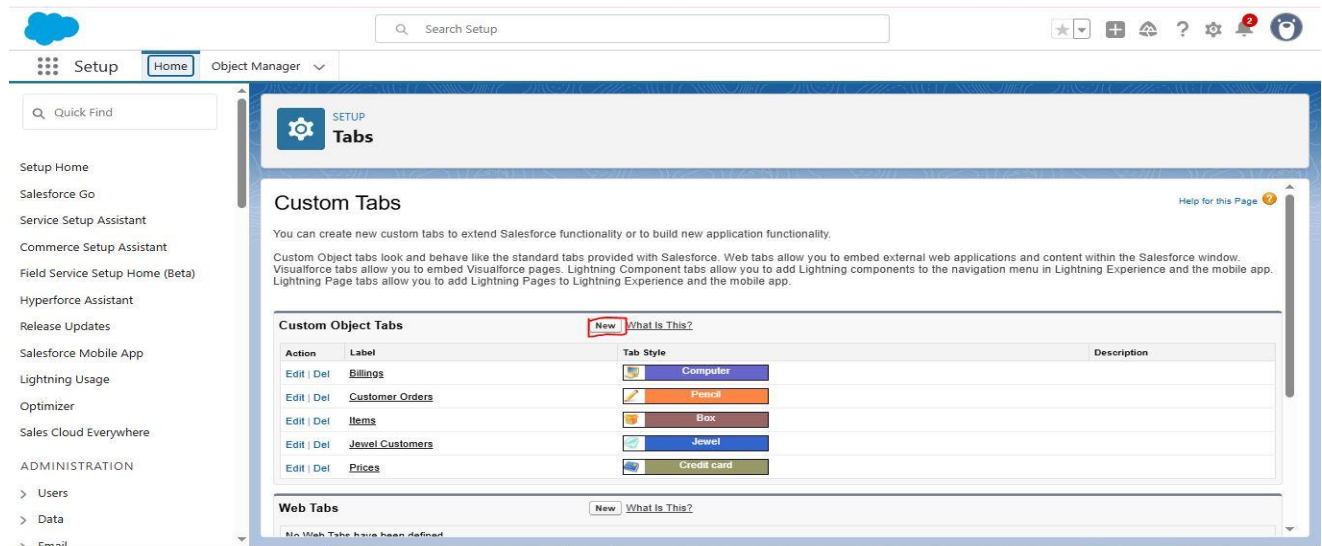
To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
 1. Enter the label name >> Item
 2. Plural label name >> Items
 3. Enter Record Name Label and Format
 - Record Name >> Item Id
 - Data Type >> Auto Number
 - Display Format >> Item-{00}
 - Starting Number >> 1
2. Click on Allow reports.
3. Allow search >> Save.

Create 3 more objects with label names as Customer Order,Price,Billing

(Use "Auto Number" as a data type for Customer Order,Price,Billing).

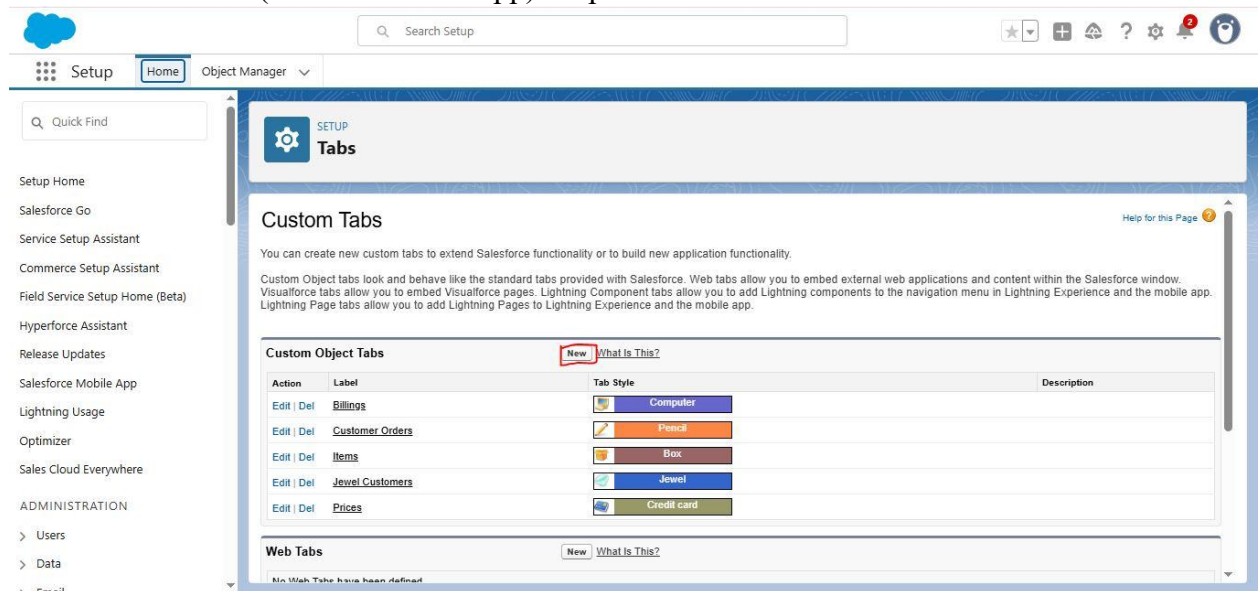
Milestone 3: Creating Tabs



Creating a Custom Tab

To create a Tab:(Customer)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Jewel Customer) >> Select any tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) keep it as default >> Save.



To create a Tab(Item)

Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)

Select Object(Item) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) keep it as default >> Save.

Note: Now create tabs for Customer Order, Price, Billing objects.

Search Setup

Setup Home Object Manager

app

Salesforce Mobile App

Data

Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

External Client Apps

External Client App Manager

OAuth Usage

Settings

Lightning Bolt

SETUP Lightning Experience App Manager

New Lightning App New External Client App

27 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

	App Name ↑	Developer Name	Description	Last Modifie...	Ap...	Vi...
1	All Tabs	AllTabSet		8/21/2025, 9:51 PM	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	8/21/2025, 9:51 PM	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	8/21/2025, 9:51 PM	Classic	✓
4	Approvals	Approvals	Manage approvals and approval flows	8/21/2025, 9:51 PM	Lightning	✓
5	Automation	FlowsApp	Automate business processes and repetitive tasks.	8/21/2025, 9:56 PM	Lightning	✓
6	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for you...	8/21/2025, 9:51 PM	Lightning	✓
7	Community	Community	Salesforce CRM Communities	8/21/2025, 9:51 PM	Classic	✓
8	Content	Content	Salesforce CRM Content	8/21/2025, 9:51 PM	Classic	✓
9	Data Cloud	Audience360	Build a thorough and complete understanding of your cus...	8/21/2025, 9:51 PM	Lightning	✓
10	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and man...	8/21/2025, 9:51 PM	Lightning	✓
11	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	8/21/2025, 9:51 PM	Lightning	✓

Milestone 4: Creating Lightning App

Create a Lightning App

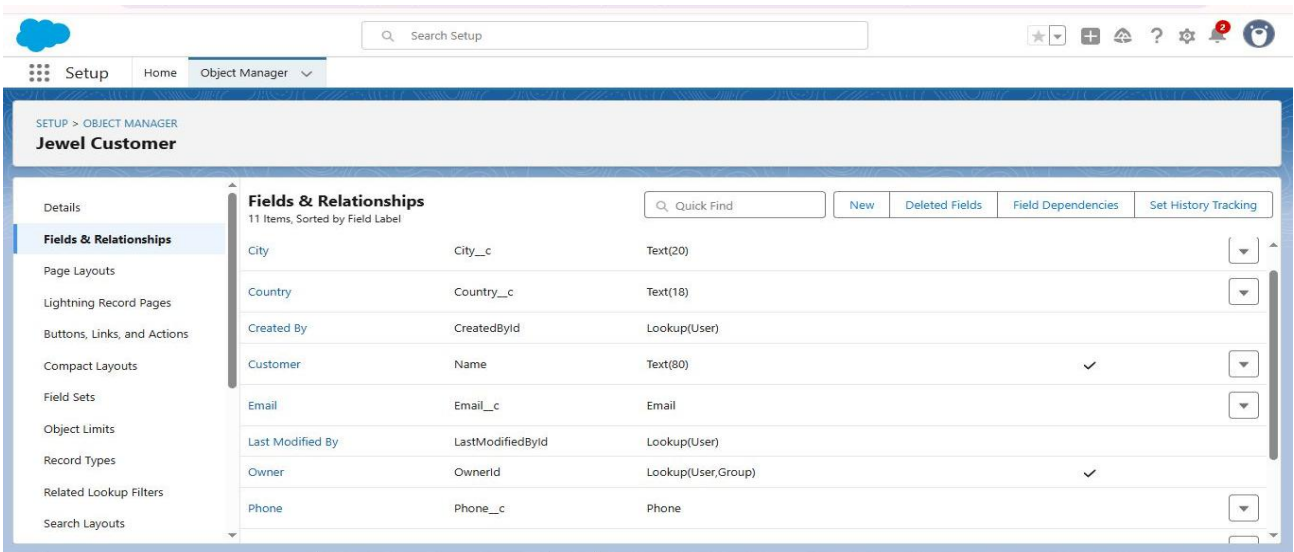
To create a lightning app page

Go to setup page >> search “app manager” in quick find >> select “app manager” >>

1. click on New lightning App.
2. Fill the app name in app details and branding as follow
App Name : Jewelry Inventory System.
Developer Name : This will auto populated
Description : Elevate your look with elegance
Image : optional (if you want to give any image you can otherwise not mandatory)
Primary colour hex value : keep this default.

3. Then click Next >> (App option page)Set Navigation Style as Console Navigation >> Next.
4. (Utility Items) keep it as default >> Next.
5. To Add Navigation Items:
6. Search for the item in the (JewelCustomer,Item,CustomerOrder,Price,Billing,Reports, Dashboard) from the search bar and move it using the arrow button ? Next? Next.
7. To Add User Profiles:
8. Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

Milestone 5: Creating Field



Creating Lookup Relationship

A Lookup relationship is a type of relationship in Salesforce that connects two objects together based on a field known as the Lookup field. It establishes a relationship between a child object and a parent object, allowing the child object to reference the parent object.

To Create a relationship between Jewel Customer & Customer Order Objects.

Go to the setup page >> click on object manager >> type object name(Customer Order) in the quick find bar >> click on the object.

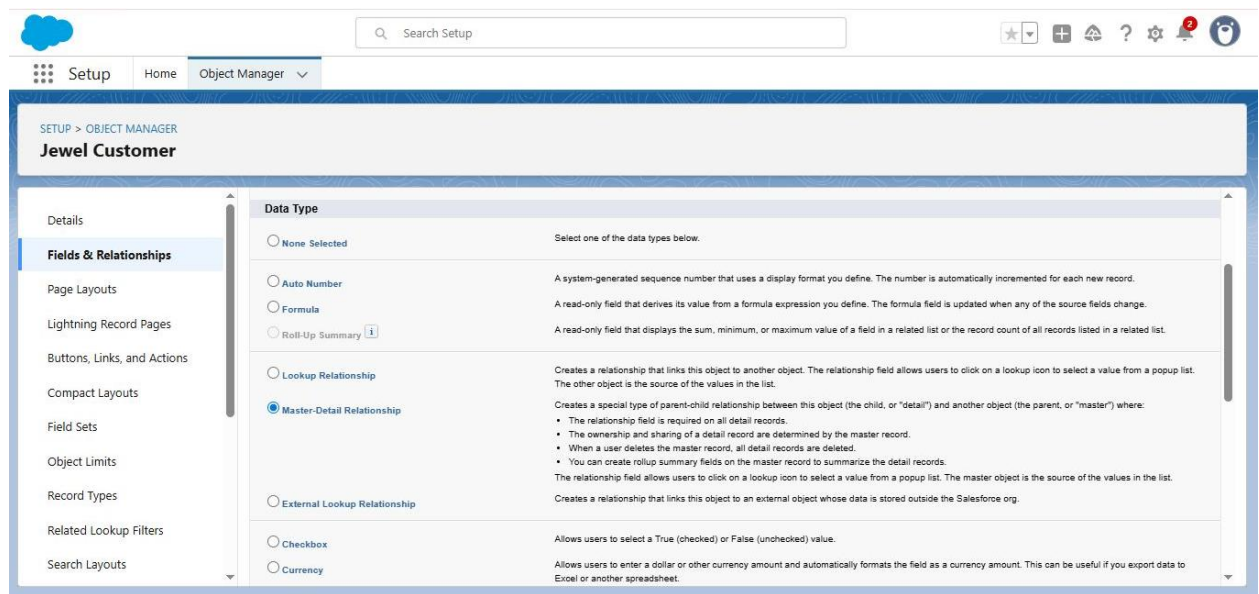
Click on fields & relationship >> click on New.

Select “Lookup relationship” as data type and click Next.

Select the related object “Jewel Customer ”.

Give Field Label as “Customer” and click Next.

Next >> Next >> Save.



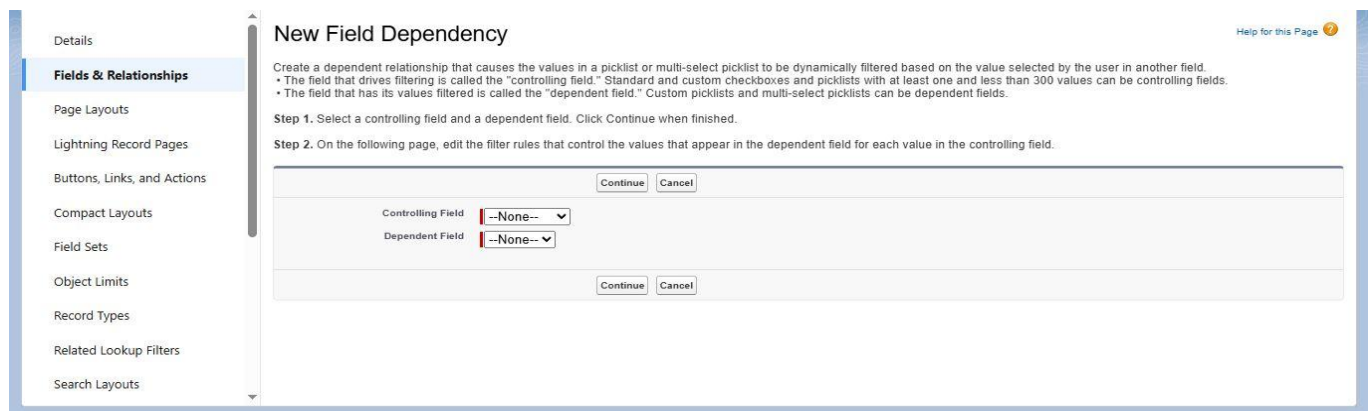
Creating a Master-Detail Relationship

Master-detail relationship is a type of relationship between two objects where the master object controls certain behaviors and settings of the detail object. Here are a few use cases that demonstrate the use of master-detail relationships

Creating Master-Detail Relationship between Item & Customer Order Object.

To Create a Master-Detail relationship :

- 1.Go to the setup page >> click on object manager >> type object name(Customer Order) in the quick find bar >> click on the object.
- 2.Click on fields & relationships >> click on New.
- 3.Select “Master-Detail relationship” as data type and click Next.
- 4.Select the related object “ Item”.
- 5.Give Field Label as “Item” and click Next.
- 6.Next >> Next >> Save.



Creating Text Field in Jewel Customer Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Text”
4. Click on Next
5. Fill the above as following:
 - o Field Label: City
 - o Length : 20
 - o Field Name : gets auto generated
 - o Click on Next >> Next >> Save and new.

Creating the Phone field in object Jewel Customer

To create fields in an object:

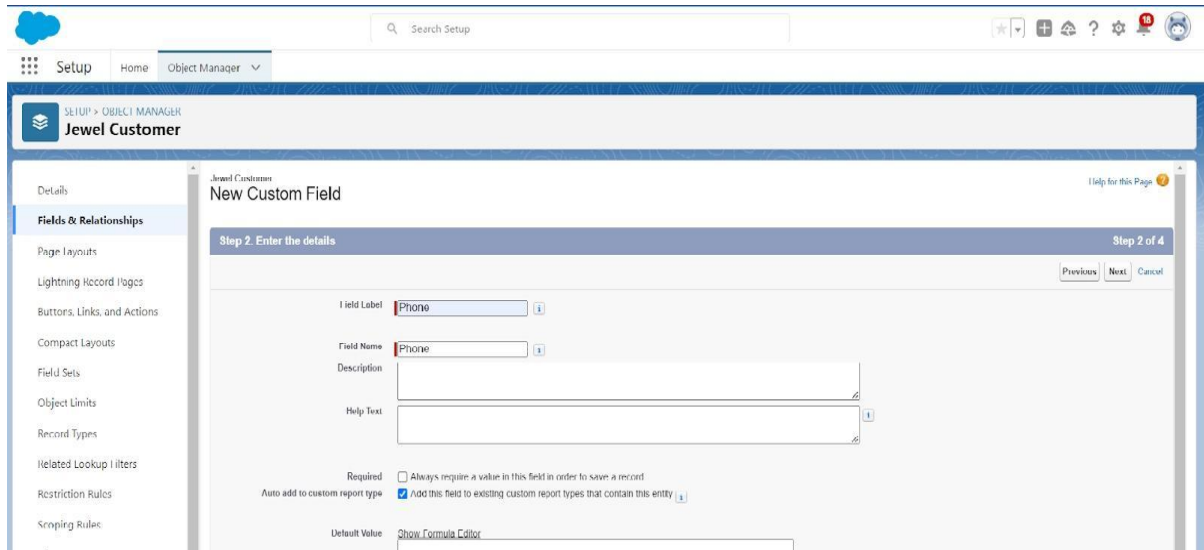
Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as “Phone” and click Next.

Given the Field Label as “ Phone”.

Field Name will be auto populated, and click on Next >> Next >> Save & new.



Creating the Email field in object Jewel Customer

To create fields in an object:

Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as “Email” and click Next.

Given the Field Label as “ Email”.

Field Name will be auto populated, and click on Next >> Next >> Save.

Setup > Object Manager > Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Item

New Custom Field

Help for this Page

Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

Field Label

Please enter the length of the number and the number of decimal places. For example, a number with a length of 6 and 2 decimal places can accept values up to "12345678.90".

Length Decimal Places

Number of digits to the left of the decimal point

Number of digits to the right of the decimal point

Field Name

Creating the number field in Item object

To create fields in an object:

Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? Click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as “Number” and click Next.

Given the Field Label as “Purity” and length as “2”.

Field Name will be auto populated, and click on Next >> Next >> Save.

Setup > Object Manager > Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Item

New Custom Field

Help for this Page

Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

Field Label

Please enter the length of the number and the number of decimal places. For example, a number with a length of 6 and 2 decimal places can accept values up to "12345678.90".

Length Decimal Places

Number of digits to the left of the decimal point

Number of digits to the right of the decimal point

Field Name

Creating Pick list Field in Item Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar>> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select Data type as “Pick list” and click Next.
4. Enter Field Label as “Item Type”.
5. In values select “Enter values(Gold, Silver), with each value separated by a new line" and enter values as shown below.
6. Next and next and save.

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar and navigation tabs for Setup, Home, and Object Manager. The 'Object Manager' tab is selected, and the 'Item' object is chosen. The left sidebar shows the 'Fields & Relationships' section. The main area displays the 'New Custom Field' wizard for the 'Item' object, specifically 'Step 2. Enter the details'. The 'Field Label' is 'Item Type'. Under the 'Values' section, the option 'Enter values, with each value separated by a new line' is selected. The text area contains 'Gold' and 'Silver'. The 'Field Name' is 'Item_Type'. The 'Restrict picklist to the values defined in the value set' checkbox is checked. There are 'Previous', 'Next', and 'Cancel' buttons at the bottom right of the wizard.

Creating Currency Field in Price Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Price) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select Data type as “Currency” and click Next.
4. Enter Field Label as “Gold Price” and length as “ 8”and decimal 0. Field name will be auto generated.
5. Click Next >> Next >> Next >> Save .

Setup > OBJECT MANAGER

Price

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Field Label: Gold price

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length: 8

Decimal Places: 0

Field Name: Gold_price

Description:

Help Text:

Previous Next Cancel

Creating Formula Field(Cross Object) in Item Object

To create fields in an object:

(Note: Create a Lookup Relationship in Item Object to Price Object with Field Name: Prices)

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? Click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select Data type as “Formula” and click Next.
4. Give Field Label and Field Name as “Gold Price” and select formula return type as “Currency” and click next.
5. Under Advanced Formula write down the formula :Prices__r.Gold_price__c / 10.

Setup > OBJECT MANAGER

Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

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 More Examples...

Simple Formula Advanced Formula

Insert Field Insert Operator

Gold price (Currency) =

Prices__r.Gold_price__c / 10

Functions

-- All Function Categories --

ABS

ACOS

ADDMONTHS

AND

ASCII

ASIN

Insert Selected Function

Check Syntax Operators & Functions

6. Click the syntax and save

Creating Remaining Fields in Objects

- JEWEL CUSTOMER
- Prices
- Items
- Billing
- Customer order

CREATE THIS WITH THE FORMAL DATA TYPE IN RELATIONSHIP

Object name

Fields

1

Jewel Customer

Field Name

Data type

State

Text(20)

Street

Text(20)

Country

Text(18)

Zip/Postal code

Text(6)

2

Price

Silver Price

Currency

(Length=8,Decimal=5)

3

Item

Field Label:Customer Name

Lookup Relationship with Jewel Customer Object

Ornament

Text(20)

Weight

Number

(Length=8,Decimal=5)

Stone Weight

Number

(Length=5,Decimal=5)

Percentage

Number

(Length=2,Decimal=0)

Stone/Other Price

Currency

(Length=8,Decimal=2)

Expected Days Of Return

Picklist

1-3 Days

4-5 Days

6-7 Days

8-10 Days

Priority

Picklist

Low

Medium

High

Critical

Silver Price

Formula

(Return Type:Number)

(Decimal=3)

$(Prices_r.Silver_price_c / 1000)$

Purity Gold Price

Formula

(Return Type:Currency)

(Decimal=2)

$((Prices_r.Gold_price_c * Purity_c) / 24) / 10$

Total Weight

Formula

(Return Type:Number)

(Decimal=3)

$(Weight_c - Stone_weight_c)$

Amount

Formula

(Return Type: Currency)

(Decimal=3)

IF(ISPICKVAL(Item_Type__c ,”Gold”), Total_weight__c * Purity_Gold_price__c ,
Total_weight__c * Silver_price__c)

KDM

Formula

(Return Type:Currency)

(Decimal=0)

(Amount__c * Percentage__c) / 100

Making Charges

Formula

(Return Type:Currency)

(Decimal=0)

IF(ISPICKVAL(Item_Type__c ,”Gold”), Weight__c * 300 , Weight__c * 10)

4

Customer Order

Order Status

Picklist

Started

Not Started

On Hold

Completed

Not Completed

5

Now create the remaining fields using the data types mentioned.

s.no

Object name

Fields

1

Jewel Customer

Field Name

Data type

State

Text(20)

Street

Text(20)

Country

Text(18)

Zip/Postal code

Text(6)

2:

Price

Silver Price

Currency

(Length=8,Decimal=5)

3:

Item

Field Label:Customer Name

Lookup Relationship with Jewel Customer Object

Ornament

Text(20)

Weight

Number

(Length=8,Decimal=5)

Stone Weight

Number

(Length=5,Decimal=5)

Percentage

Number

(Length=2,Decimal=0)

Stone/Other Price

Currency

(Length=8,Decimal=2)

Expected Days Of Return

Prickliest

1-3 Days

4-5 Days

6-7 Days

8-10 Days

Priority

Picklist

Low

Medium

High

Critical

Silver Price

Formula

(Return Type:Number)

(Decimal=3)

(Prices__r.Silver_price__c / 1000)

Purity Gold Price

Formula

(Return Type:Currency)

(Decimal=2)

((Prices__r.Gold_price__c * Purity__c) / 24) / 10

Total Weight

Formula

(Return Type:Number)

(Decimal=3)

(Weight__c - Stone_weight__c)

Amount

Formula

(Return Type:Currency)

(Decimal=3)

IF(ISPICKVAL(Item_Type__c ,"Gold"), Total_weight__c * Purity_Gold_price__c ,
Total_weight__c * Silver_price__c)

KDM

Formula

(Return Type:Currency)

(Decimal=0)

(Amount__c * Percentage__c) / 100

Making Charges

Formula

(Return Type:Currency)

(Decimal=0)

IF(ISPICKVAL(Item_Type__c ,"Gold"), Weight__c * 300 , Weight__c * 10)

4:

Customer Order

Order Status

Picklist

Started
Not Started
On Hold
Completed
Not Completed

5.Billing

Field Label:Item
Lookup Relationship
With Item Object
Ornament

Formula
(Return Type:Text)

Item__r.Ornament__c

Stone weight
Formula
(Return Type:Number)
(Decimal=2)

Item__r.Stone_weight__c

Weight
Formula
Return Type:Number
(Decimal=2)

Item__r.Total_weight__c

Amount
Formula
(Return Type:Currency)
(Decimal=2)
Item__r.Amount__c

Gold/Silver Price
Formula
(Return Type:Currency)
(Decimal=2)

IF(ISPICKVAL(Item__r.Item_Type__c ,”Gold”), Item__r.Gold_price__c ,
Item__r.Silver_price__c)

KDM Charge

Formula

(Return Type:Currency)

(Decimal=0)

Item__r.KDM__c

Making Charges

Formula

(Return Type:Currency)

(Decimal=2)

Item__r.Making_Charges__c

Stones/other price

Formula

(Return Type:Currency)

(Decimal=2)

Item__r.Stone_other_price__c

Total Amount

Formula

(Return Type:Currency)

(Decimal=0)

Amount__c + KDM_Charge__c + Stone_other_price__c + Making_Charges__c

Creating the Field Dependencies

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.

Go to setup >> click on Object Manager >> type object name(Item) in quick find bar >> click on the object.

Click on Fields & Relationships and click on the Priority field.

Search for Field Dependencies and click on New. Select Controlling Field as “Priority” and Depending field as “Expected Days of Return” >> Continue.

Select the “Expected Days of Return” values of related Priority values and Click on Include Values >> Save.

Creating the validation rule

Creating the validation rule for Postal Code field in Jewel Customer object

check whether the fields mentioned in the formula field are created or not , if not go to activity 10 and create those fields mentioned in Jewel Customer object.

Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar>> click on the object.

Click on the validation rule >> click New.
Enter the Rule name as “Postal Code “.

Insert the Error Condition Formula as :-

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

Enter the Error Message as “Must contain 6 digits”, select the Error location as Field and select the field as “Zip/Postal code”, and click Save.

NOTE:

Create One more Validation rule for Jewel Customer object.
Enter Rule name as “Validation Rule For JewelCustomerObject “.

Insert the Error Condition Formula as :-

OR(ISBLANK(City__c), ISBLANK(Country__c),ISBLANK(Phone__c),ISBLANK(State__c),ISBLANK(Street__c))

Enter the Error Message as “Please fill Required fields”, select the Error location as Top of Page and click Save.

The screenshot shows the 'Validation Rule Edit' page in Salesforce Setup. The left sidebar lists various setup options, with 'Validation Rules' selected. The main area is titled 'Validation Rule Edit' and contains the following fields:

- Rule Name:** Postal Code
- Active:** ☒
- Description:** (empty text area)
- Error Condition Formula:**
 - Example: `Discount_Percent__c > 0.30`
 - Display an error if Discount is more than 30%
 - If this formula expression is true, display the text defined in the Error Message area
 - Buttons: Insert Field, Insert Operator
 - Formula: `AND (OR (LEN (Zip_Postal_code__c) <> 6, NOT (REGEX (Zip_Postal_code__c, \"^[0-9]{6}$\"))), NOT (ISBLANK (Zip_Postal_code__c)))`
 - Buttons: Check Syntax, No errors found
- Functions:** A list of functions including ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. The selected function is ABS(number).
- 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
 - Field: Zip/Postal code

Create Validation rule for Item object.
Enter Rule name as “ValidationRule For Item“.

Insert the Error Condition Formula as :-

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))

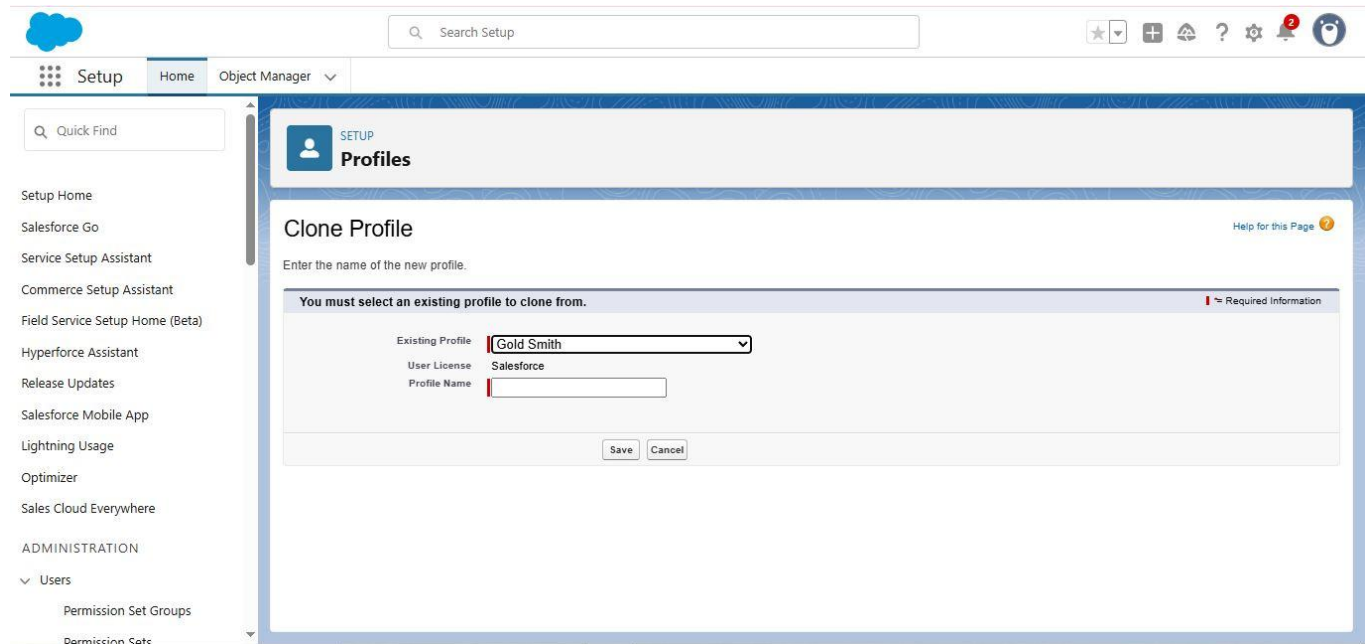
Enter the Error Message as “Please fill Required fields”, select the Error location as Top of Page and click Save.

Milestone 6: Create Profiles

Gold Smith Profile

To create a new profile:

Go to setup >> type profiles in quick find box >> click on profiles ? clone the desired profile (System Administrator) >> enter profile name (Gold Smith) >> Save.

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. A search bar labeled 'Search Setup' is on the right. Below the navigation bar, a left sidebar contains a 'Quick Find' box and a list of setup categories like 'Setup Home', 'Salesforce Go', 'Service Setup Assistant', etc. The main content area is titled 'SETUP Profiles'. A 'Clone Profile' dialog box is open, prompting the user to 'Enter the name of the new profile.' It states 'You must select an existing profile to clone from.' and shows a dropdown menu with 'Gold Smith' selected. Below the dropdown, there are fields for 'User License' (Salesforce) and 'Profile Name'. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

While still on the profile page, then click Edit.

Scroll down to Custom Object Permissions and Give access permissions for Jewel Customer, Item, Customer Order, Price, Billing .

Scroll down and Click on Save

Worker Profile

Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Salesforce Platform User) >> enter profile name () >> Save.

While still on the profile page, then click Edit.

Scroll down to Custom Object Permissions and Give access permissions for Items, Price and Customer Order objects.

Scroll down and Click on Save.

Milestone 7 :Roles

Creating Gold Smith Role

From setup ,Go to quick find >> Search for Roles >> click on set up roles.

Click on Expand All and click on add role under whom this role works.

Give Label as “Gold Smith” and Role name gets auto populated. Check to whom this role (Gold Smith) reports. Then click on Save.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'role' and a list of categories: Users, Roles (selected), Feature Settings, Sales, Service, and Case Teams. The main content area is titled 'SETUP Roles' and 'Understanding Roles'. It explains that roles control organization reporting and access. A 'Sample Role Hierarchy' is shown for 'Territory-based Sample', with a tree structure: Executive Staff (CEO, President, CFO, VP, Sales) at the top, followed by Western, Eastern, and International Sales Directors, and then their respective Sales Representatives. A 'Set Up Roles' button is highlighted at the bottom right.

The screenshot shows the 'Creating the Role Hierarchy' section of the Salesforce Setup Roles page. It instructs users to build on the existing hierarchy by clicking 'Add Role'. The 'Your Organization's Role Hierarchy' is displayed in a tree view for 'Sri krishna adithya college of arts and science'. The hierarchy includes roles like CEO, CFO, COO, Gold Smith, Worker, SVP, Customer Service & Support, and Customer Support, International. The 'Gold Smith' role is highlighted, and its parent role is 'Gold Smith'.

Create one more role as Worker which reports to Gold Smith.

The screenshot shows the Salesforce Setup interface. On the left, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. The 'Roles' section is selected. The main content area is titled 'Roles' and 'Creating the Role Hierarchy'. It displays a tree view of the role hierarchy for the organization 'Sri Krishna Adithya College of Arts and Science'. The hierarchy starts with 'CEO' at the top, followed by 'CFO', 'COO', 'Gold Smith', 'Worker', 'SVP, Customer Service & Support', and 'Customer Support, International'. Each role has an 'Add Role' link next to it. A search bar at the top left of the main content area contains the text 'role'. A 'Show in tree view' button is located at the top right of the tree view.

Milestone 8: Creating Users

Users

Create User

Go to setup >> type users in quick find box >> select users >> click New user.

Fill in the fields

First Name : ***

Last Name : ***

Alias : Give a Alias Name

Email id : Give your Personal Email id

Username : Username should be in this form: [text@text.text](#)

Nick Name : Give a Nickname

Role : Gold Smith

User licence : Salesforce

Profiles : Gold Smith

The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with categories like Users, Roles, Feature Settings, Sales, Service, and Case Teams. The 'Users' section is expanded, showing options like 'Contact Roles on Contracts' and 'Contact Roles on Opportunities'. The main content area is titled 'New User' and contains a 'User Edit' form. The form has two columns of fields. The left column includes First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The right column includes Role (set to '<None Specified>'), User License (set to 'Work.com Only'), Profile (set to 'Work.com Only User'), and a list of checkboxes for various user types: Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. At the top of the form are buttons for 'Save', 'Save & New', and 'Cancel'. A 'Help for this Page' link is in the top right corner.

Setup Home Object Manager

Q role

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

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

SETUP Users

New User Help for this Page

User Edit Save Save & New Cancel

General Information Required Information

First Name

Last Name

Alias

Email

Username

Nickname

Title

Company

Department

Division

Role

User License

Profile

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Save.

Create Another 2 User

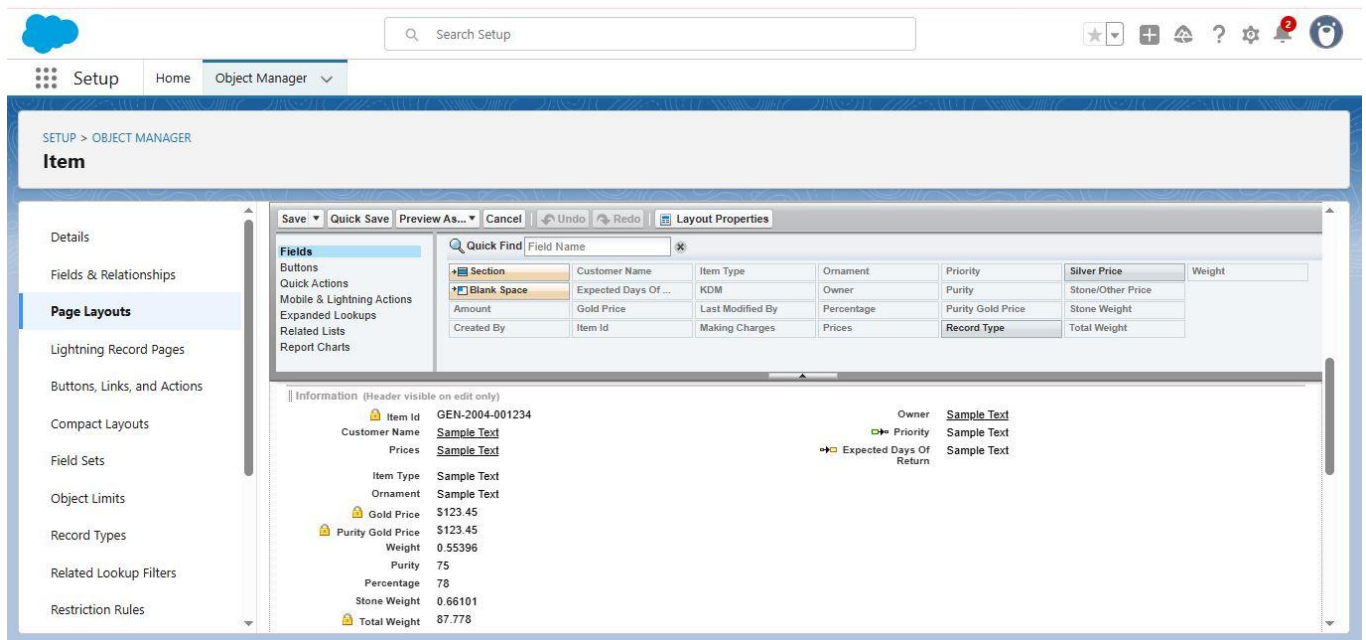
1. Go to setup >> type users in quick find box >> select users >> click New use
2. Give the WORK and create 2 more

Milestone 9: Creating Page layout

Page layouts

To Create a Gold Page layout

- Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit
- Click on Page layout >> Click on New.
- Give Page layout Name as “Page Layout for Gold” and click on Save and New.
- Arrange the field as shown in the Information Section ,remove fields which are related to Silver and click Ok.
- Click Save.
- Make sure your page layout looks like the picture above



To Create a Silver Page layout

- Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.
- Click on Page layout >> Click on New.
- Give Page layout Name as “Page Layout for Silver” and click on Save.
- Arrange the field as shown in the Information Section ,remove fields which are related to Gold and click Ok.

Milestone 10: Creating Record types

Record Types

To create a Record Type

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
2. Click on the Record Types >> click New.
3. Select Existing Record as “Master”,Record type Label as “Gold”,Description as “Gold items information”
4. Uncheck for “Make Available”
5. Scroll down and check for the Gold Smith,Worker JW & System Administrator profile and click on Next

Force.com - Free User	Item Layout
Gold Partner User	Item Layout
Gold smith	Page layout for Gold
High Volume Customer Portal	Item Layout
High Volume Customer Portal User	Item Layout
HR	Item Layout
HR Recruiter	Item Layout
Identity User	Item Layout
Manager	Item Layout
Marketing User	Item Layout
Minimum Access - Salesforce	Item Layout
Partner App Subscription User	Item Layout
Partner Community Login User	Item Layout
Partner Community User	Item Layout
Read Only	Item Layout
s1	Item Layout
Salesforce API Only System Integrations	Item Layout
Sales User	Item Layout
Sales User.	Item Layout
Silver Partner User	Item Layout
Solution Manager	Item Layout
Standard Platform User	Item Layout
Standard User	Item Layout

Select “Apply a different layout for each profile”, and change page layout to “Page Layout for Gold”for Gold Smith,Worker and System Administrator ? save & new.

Create another Record Type with name “Silver” following the steps from Activity1

Use page layout for Silver.

Milestone 11: Create Permission Sets

Permission sets

Creating permission set

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets.

1. Go to setup >> type “permission sets” in quick search >> select permission sets >> New.
2. Enter the label name as “Per to Worker”, API will be auto populated ? save.
3. Under Apps Select object settings.
4. Click on Items object ? click on Edit ? under Item:Record Type Assignments,enable Gold,Silver ? Object permission check for read ,edit and create.
5. Click on Save.
6. After saving the permission click on the Manage assignment
7. Now click on the Add Assignment.
8. Now select the users which you have created in user milestone, using Worker profile and click on Next ? Assign? Done.

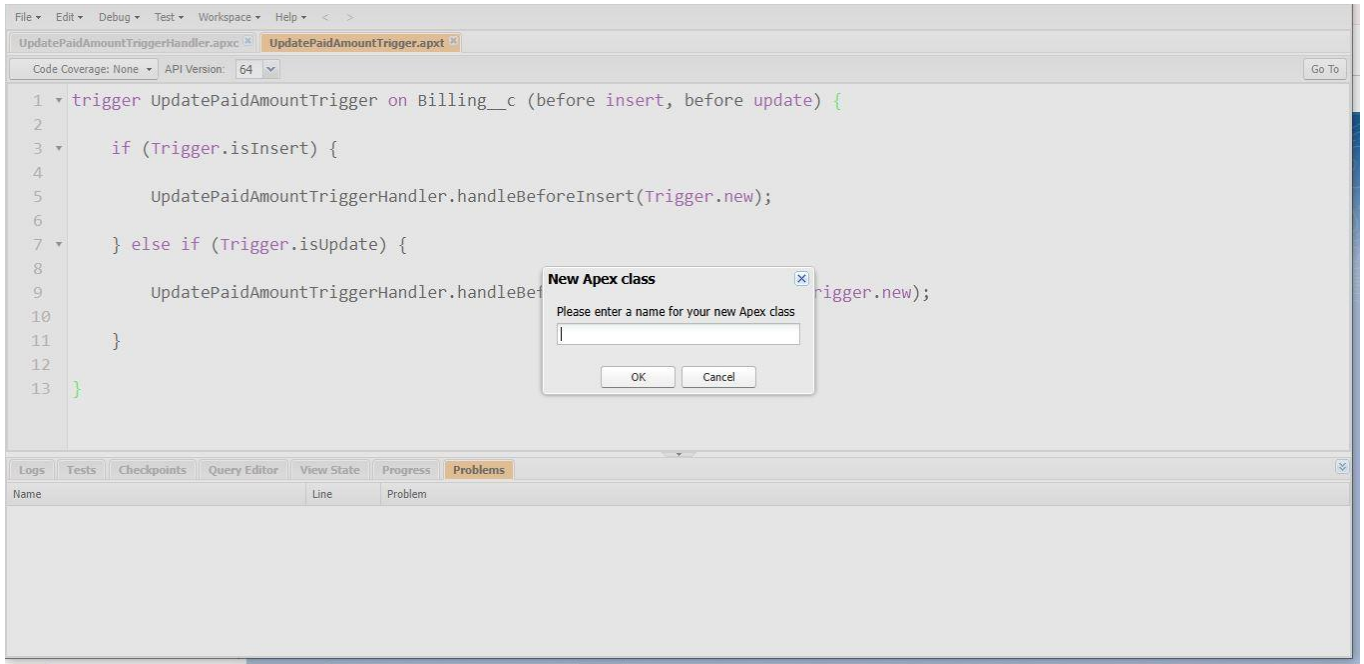
The screenshot shows the Salesforce Setup interface. The left sidebar contains the navigation menu with 'Setup' selected. The main content area displays the 'Permission Sets' page. At the top, there is a search bar and a 'New' button. Below this, there is a table of existing permission sets. The table has columns for 'Action', 'Permission Set Name', 'Description', and 'License'. The 'New' button is highlighted with a red box.

Action	Permission Set Name	Description	License
<input type="checkbox"/>	(Legacy) Data Cloud Data Aware Specialist	This Data Cloud permission set will be deprecated in Spring ...	Customer Data Platform
<input type="checkbox"/>	(Legacy) Data Cloud Marketing Admin	Allows access to Data Cloud Setup if the user is also a Sale...	Customer Data Cloud for Marketing
<input type="checkbox"/>	(Legacy) Data Cloud Marketing Manager	This Data Cloud permission set will be deprecated in Spring ...	Customer Data Platform
<input type="checkbox"/>	(Legacy) Data Cloud Marketing Specialist	This Data Cloud permission set will be deprecated in Spring ...	Customer Data Platform
<input type="checkbox"/>	(Legacy) Data Cloud for Marketing Data Aware Specialist	This Data Cloud permission set will be deprecated in Spring ...	Customer Data Cloud for Marketing
<input type="checkbox"/>	(Legacy) Data Cloud for Marketing Manager	This Data Cloud permission set will be deprecated in Spring ...	Customer Data Cloud for Marketing
<input type="checkbox"/>	(Legacy) Data Cloud for Marketing Specialist	This Data Cloud permission set will be deprecated in Spring ...	Customer Data Cloud for Marketing
<input type="checkbox"/>	Access Agentforce Default Agent	Gives users access to the default Agentforce agent in Sal...	Agentforce (Default)
<input type="checkbox"/>	Agent Platform Builder	Allow access to agent platform.	Agent platform builder

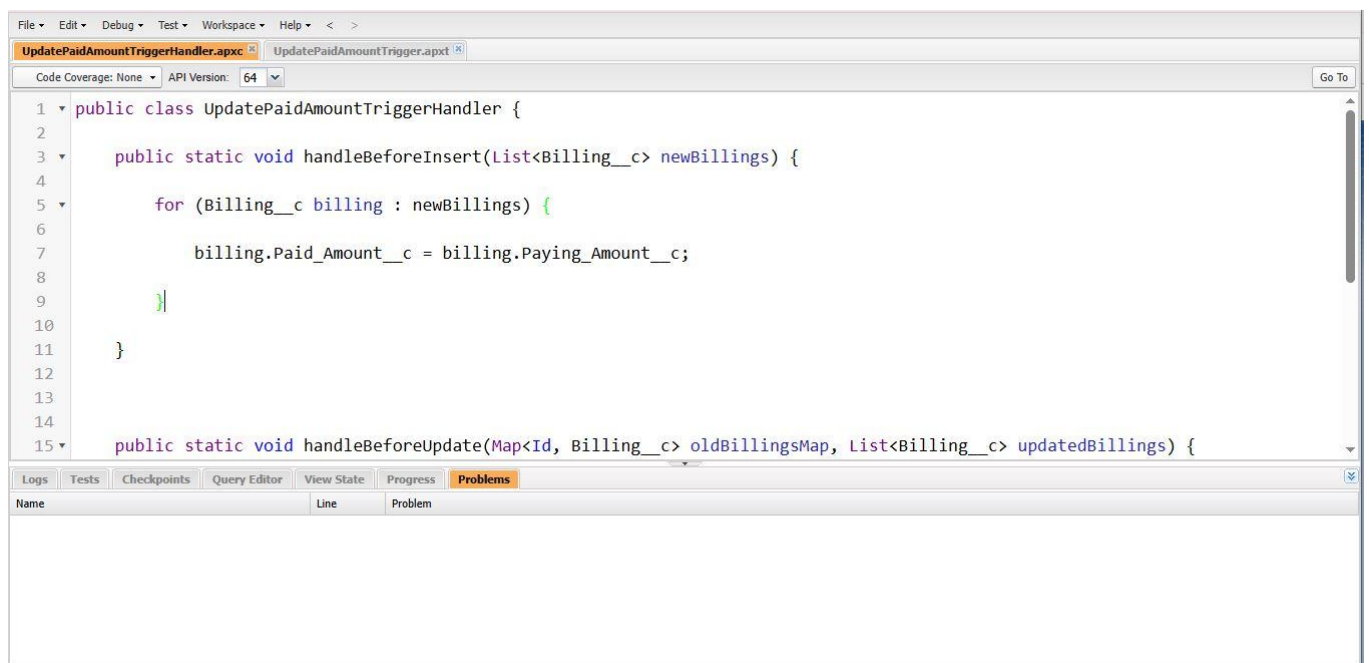
Milestone 12: Creating Apex Trigger

Trigger

use the correct coding in the apex class



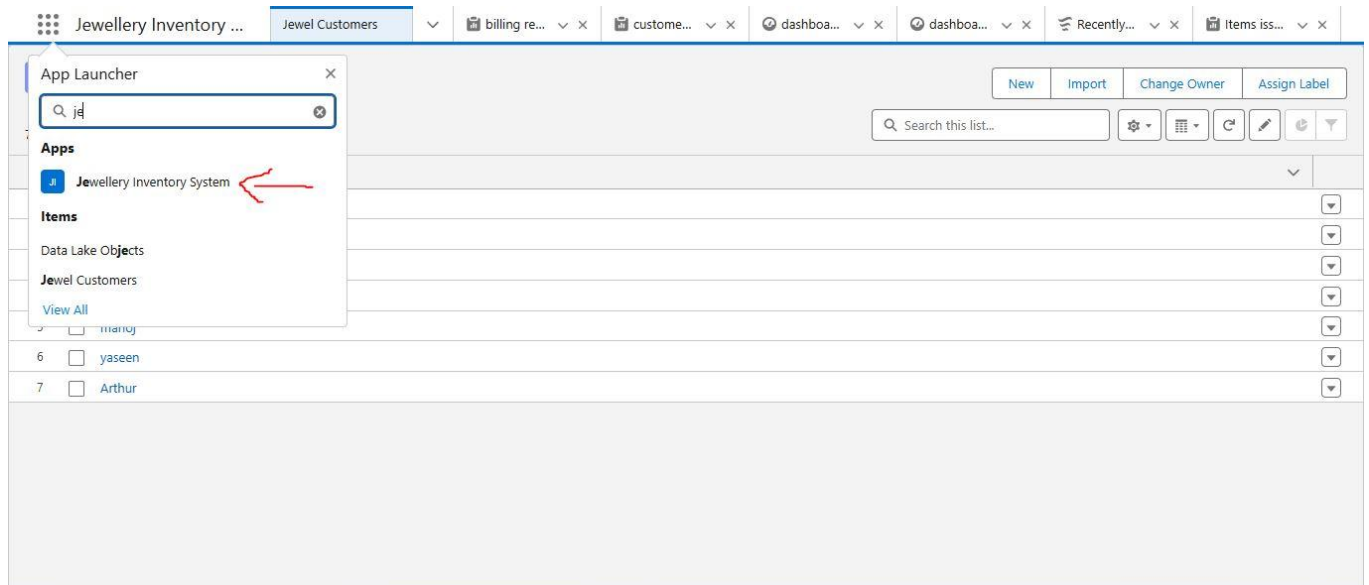
And create the apex trigger use the correct coding



Milestone 13 : User Adoption

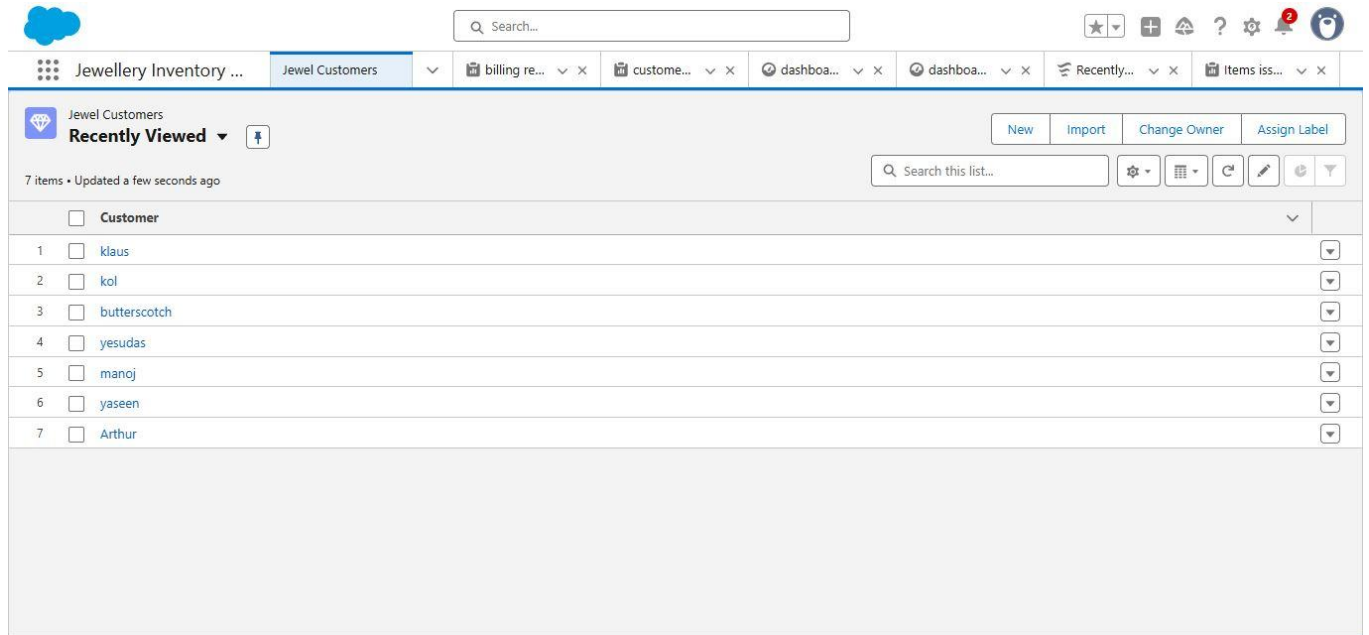
User Adoption

- Create a Record (Jewel Customer)
- Click on App Launcher on the left side of the screen.
- Search Jewelry Inventory System & click on it.
- Click on Drop Down and Click on the Jewel Customer tab.
- Click New
- Fill the Details and click on Save.



View a Record(Jewel Customer)

- Click on App Launcher on the left side of the screen.
- Search Jewelry Inventory System & click on it.
- Click on the Jewel Customer Tab.
- Click on any record name. you can see the details of the Jewel Customer



The screenshot shows the 'Jewel Customers' section of a software interface. At the top, there's a search bar and a navigation bar with tabs like 'Jewellery Inventory ...', 'Jewel Customers', 'billing re...', 'custome...', 'dashboa...', and 'dashboa...'. Below the navigation bar, there's a 'Recently Viewed' section with a list of 7 items. The list is titled 'Jewel Customers' and 'Recently Viewed'. It shows a table with 7 rows, each representing a customer. The columns are 'Customer' and 'Action'. The customers listed are: 1. klaus, 2. kol, 3. butterscotch, 4. yesudas, 5. manoj, 6. yaseen, and 7. Arthur. Each row has a checkbox and a dropdown arrow in the 'Action' column.

	Customer	Action
1	<input type="checkbox"/> klaus	▼
2	<input type="checkbox"/> kol	▼
3	<input type="checkbox"/> butterscotch	▼
4	<input type="checkbox"/> yesudas	▼
5	<input type="checkbox"/> manoj	▼
6	<input type="checkbox"/> yaseen	▼
7	<input type="checkbox"/> Arthur	▼

Delete a Record(Jewel Customer)

- Click on App Launcher on the left side of the screen.
- Search Jewelry Inventory System & click on it.
- Click on the Jewel Customer Tab.
- Click on Arrow at right hand side on that Particular record.
- Click delete.
- Note:Create at least 10 records for each of the objects: Jewel Customer,Price,Item,Customer Order and Billing.

Milestone 14: Creating Reports

Create Report

- Go to the app >> click on the reports tab
- Click New Report.
- Select report type from category or from report type panel or from search panel ? click on start report
- Customise your report
- Save or run it.

The screenshot shows the 'Jewel Customers' section of the 'Jewellery Inventory' app. A dropdown menu is open, showing various options: Items, Prices, Billings, Reports (highlighted with a red box), Dashboards, and Customer Orders. The 'Reports' option is the target for the next step.

Reports

- Create a report with report type: “Item with Billings”.
- Create a report with report type: “Billings with item and Customer order”.

The screenshot shows the 'Reports' section of the 'Jewellery Inventory' app. It displays a list of recent reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The 'Recent' tab is selected, showing four reports.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Items issue Report		Private Reports	Bipinraj G	9/5/2025, 5:56 AM	
Created by Me	customer order report		Private Reports	Bipinraj G	9/5/2025, 5:58 AM	
Private Reports	billing report		Private Reports	Bipinraj G	9/5/2025, 5:55 AM	
Public Reports	price report		Private Reports	Bipinraj G	9/5/2025, 5:51 AM	

Milestone 15: Creating Dashboards

Dashboards

Create Dashboard

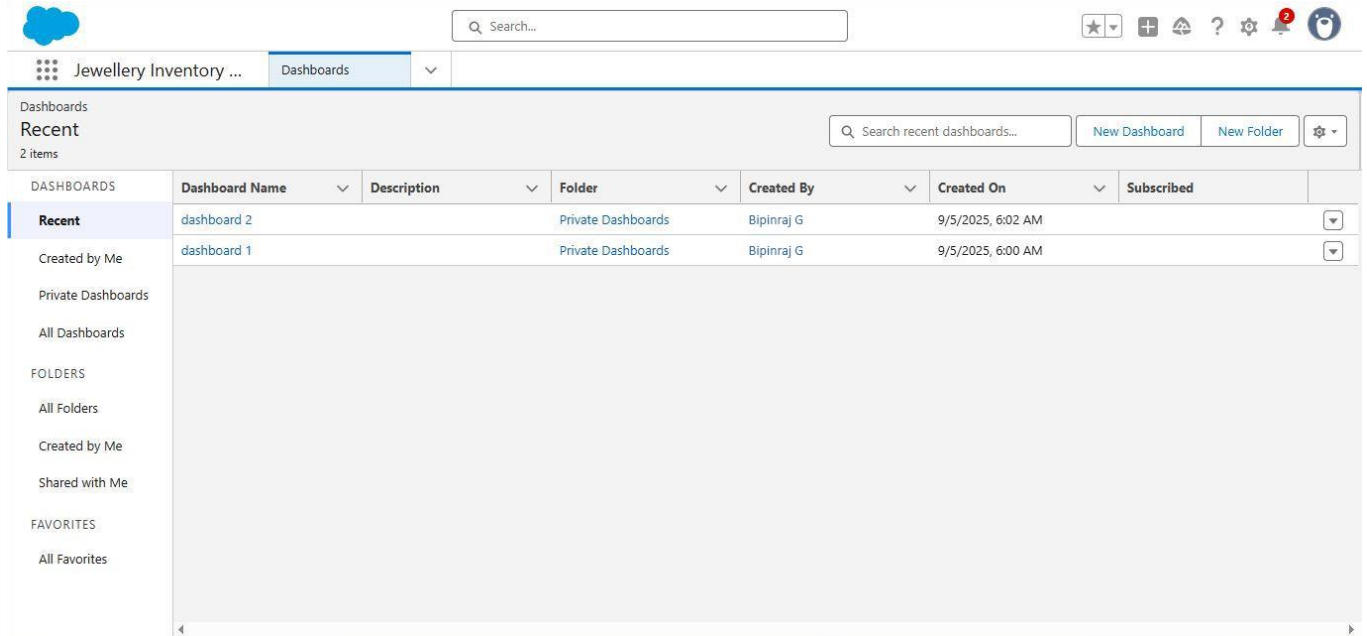
- Go to the app >> click on the Dashboards tabs
- Give a Name and click on Create.
- Select add component
- Select a Report and click on select.
- Click Add then click on Save and then click on Done.

New Dashboard

***Name**

Description

Folder



Create another Dashboard

Milestone 16 : Creating Flows

Flows

Create a Flow

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.
2. Select the Record-triggered flow and Click on Create.
3. Select the Object as a “Billing” in the Drop down list.
4. Select the Trigger Flow when: “A record is Created or Updated”.
5. Select the Optimise the flow for: “Actions and Related Records” and Click on Done.
6. Now change the mode form Auto-layout to free-form.
7. Now select the manger option in the toolbox, click New resource.
8. Select the resource type as text template.
9. Enter the API name as “ Email body”.
10. Ace
11. Maximize Screen
12. Create a Flow
13. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.
14. Select the Record-triggered flow and Click on Create
15. Select the Object as a “Billing” in the Drop down list

Configure Start

Select Object
Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object
Billing

Configure Trigger
* Trigger the Flow When:

☐ A record is created
☐ A record is updated
☒ A record is created or updated
☐ A record is deleted


Set Entry Conditions
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements


[Cancel](#) [Done](#)


New Automation


 **Triggered Automations**
Showing 8 of 73 results


Filter By ☒ Triggered ☐ Scheduled ☐ Screen ☐ AutoLaunched

Types (4)

 **Record-Triggered Flow**
Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.

 **Platform Event—Triggered Flow**
Launches when a platform event message is received. This autolaunched flow runs in the background.

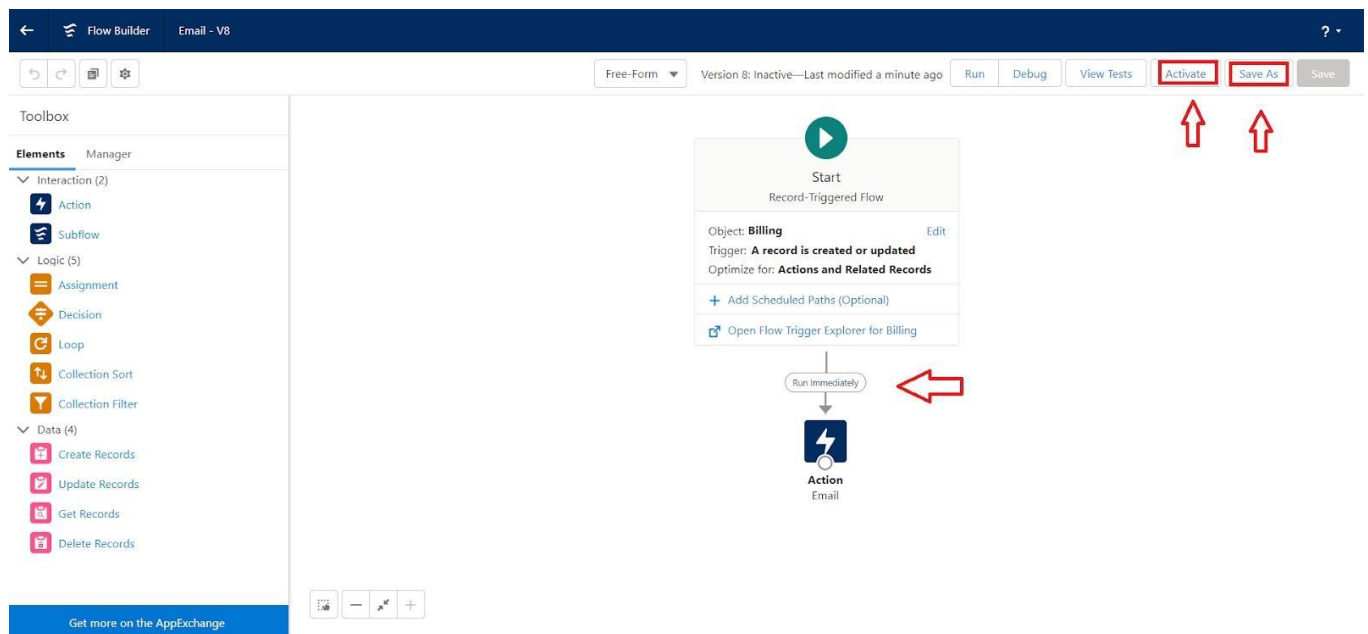
 **Record-Triggered Orchestration**
Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.

 **Record-Triggered Flow Approval Process**
Launches when a record is created or updated. A flow

[Back](#)

16. Select the Trigger Flow when: “A record is Created or Updated”.
17. Select the Optimise the flow for: “Actions and Related Records” and Click on Done
18. Now change the mode from Auto-layout to free-form.
19. Now select the manger option in the toolbox, click New resource.
20. Select the resource type as text template
21. Enter the API name as “ Email body
22. Change the view as Rich Text ? View to Plain Text.
23. Now click on elements, and drag the action element into the preview pane.
24. Their action bar will be opened in that search for “ send email ” and click on it.
25. Give the label name as “ notice”
26. API name will be auto populate
27. Enable the body in set input values for the selected action
28. Select the text template that was created
29. Include Recipient Address list, select the email form the record.
30. ({!\$Record.Item_r.Customer_Namer.Email_c})
31. Include the subject as “Welcome to Jewelry Inventory System ”.

32. Click done.



Conclusion

The CRM application for jewel management successfully streamlines and modernizes the way jewelry businesses manage their customer relationships, inventory, and sales processes. By integrating customer data, purchase history, and personalized preferences, the system enables jewelers to deliver a more engaging and customer-focused experience. Additionally, it enhances operational efficiency through features such as order tracking, sales analysis, inventory management, and follow-up reminders. This project demonstrates how a CRM tailored to the jewelry industry not only improves customer satisfaction and loyalty but also assists business owners in making informed decisions based on real-time data. Overall, the application provides a sustainable, user-friendly, and scalable solution that bridges the gap between traditional jewelry business practices and modern digital transformation.