

PROJECT TITLE: CRM APPLICATION FOR JEWEL MANAG E ME NT

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1.INTRODUCTION

1.1Projectoverview

CRM application for a jewelry management project aims to improve customer relationships, streamline sales and marketing processes, and centralize customer data to foster growth. Itinclude managing customer profiles, tracking purchase history, enabling personalized communication, and analyzing customer behavior to offer purpose tailored recommendations and conduct targeted marketing campaigns. By centralizing information and automating tasks, a jewelry CRM enhances customer satisfaction, drives loyalty, and provides valuable insights for better business decisions and increased sales.

1.2Purpose

The main purpose of the project is to:

Gathers data on preferences, buying history, and behaviors to personalize outreach and improve satisfaction.

Tracks inquiries and sales leads, automates follow- ups, and enables personalized marketing campaigns based on customer data.

Analyzes sales data to identify top- selling and slow- moving items, helping to optimize stock levels.

Streamlines communication, handles customer feedback, and provides personalized support by documenting all interactions.



Enhances sales efficiency and provides a comprehensive view of the business to facilitate growth

2.DEVELOPMENT PHASE

Creating Developer Account

The project was developed on salesforce developer org, created via:

<https://developer.salesforce.com/signup>

salesforce.com/form/dev

+

3

salesforce

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

Agentforce

Steps

1 Select type

Customer Support

Sales Coach

Sales Development

1

2

3

Sign up for your Developer Edition

A free Salesforce Platform environment with Agentforce and Data Cloud

First name

Last name

Job title

Work email

Company

Country/Region

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.

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Object Created

Jewel customer –To store and manage information about customer.

Home icon | develop.lightning.force.com | + | 4 | ⋮

Cloud icon | [Icons: Star, Plus, Lock, Question, Gear, Bell, Profile] | Search Setup

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
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers
- Validation Rules
- Conditional Field Formatting

Details Edit Delete

Description

API Name

Jewel_Customer__c

Custom

✓

Singular Label

Jewel Customer

Plural Label

Jewel Customers

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Custom Tabs –Custom object look and behave like the standard tabs provided with salesforce.

Home elop.lightning.force.com + 4

Search Setup

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

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

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

Edit

Delete

Fields validation rules –Creating the validation rules for postal code field in jewel customerobject.

4

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

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Jewel Customer Validation Rule

Back to Jewel Customer

Help for this Page

Validation Rule Detail

Edit

Clone

| | | | |
|-------------------------|---|----------------|----------------------------------|
| Rule Name | Postal_Code | Active | ✓ |
| Error Condition Formula | AND(OR(LEN(Zip_Postal_code__c) <> 6, NOT(REGEX(Zip_Postal_code__c, "[0-9]{6}\$")), NOT(ISBLANK(Zip_Postal_code__c)))) | | |
| Error Message | Must contain 6 digits", select the Error location as Field and select the field as "Zip/Postal code | Error Location | Top of Page |
| Description | | | |
| Created By | Renuga.sri.R, 8/31/2025, 3:07 AM | Modified By | Renuga.sri.R, 8/31/2025, 3:07 AM |

Edit

Clone

Roles for gold smith - A Role is user visibility access at the record level.
Gold –Expand all and click on add role.

Home Setup Home Object Manager

Search Setup

Roles

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 Roles

Creating the Role Hierarchy

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

Your Organization's Role Hierarchy Show in tree view

[Collapse All](#) [Expand All](#)

- TheSmartbridge**
 - [Add Role](#)
 - CEO** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - CFO** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - COO** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Gold Smith** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Worker** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - SVP, Customer Service & Support** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Customer Support, International** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Customer Support, North America** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Installation & Repair Services** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - SVP, Human Resources** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - SVP, Sales & Marketing** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - VP, International Sales** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - VP, Marketing** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Marketing Team** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - VP, North American Sales** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Director, Channel Sales** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Channel Sales Team** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Director, Direct Sales** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Eastern Sales Team** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Western Sales Team** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)

Users –To create two more user in same profile.

Setup Home Object Manager

Search Setup

Users

All Users [Help for this Page](#)

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User Reset Password(s) Add Multiple Users

| Action | Full Name | Alias | Username | Role | Active | Profile |
|-------------------------------|--------------------|---------|---|------------|--------|---------------------------------|
| <input type="checkbox"/> Edit | Chatter Expert | Chatter | chatty.00dgl000009xqefua2.xc92e7qw7q6v@chatter.salesforce.com | | ✓ | Chatter Fr User |
| <input type="checkbox"/> Edit | EPIC, OrgFarm | OEPIE | epic.ce436a7388ae@orgfarm.salesforce.com | | ✓ | System Administ |
| <input type="checkbox"/> Edit | Mikaelson, Kol | kmika | renuga@renu.com | Worker | ✓ | Worker profiles |
| <input type="checkbox"/> Edit | Mikaelson, Niklaus | nmika | renu@renu.com | Gold Smith | ✓ | Gold Smit |
| <input type="checkbox"/> Edit | R. Renuga, sri | ren | renugasri900443@agentforce.com | | ✓ | System Administ |
| <input type="checkbox"/> Edit | User, Integration | integ | integration@00dgl000009xqefua2.com | | ✓ | Analytics Cloud Integrator User |
| <input type="checkbox"/> Edit | User, Security | sec | insightssecurity@00dgl000009xqefua2.com | | ✓ | Analytics Cloud Security U |

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Page layout for gold and silver –A Page layout us to allow customise design and organise detail and edit page of records.

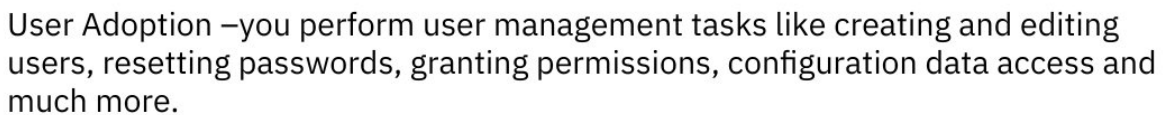
Gold –Click the object manager in page layout, to create the gold page layout.

Silver –Like same procedure the silver page layout also.

The screenshot shows the Salesforce Setup interface. At the top, the browser address bar displays 'elop.lightning.force.com'. Below the browser, the Salesforce navigation bar includes a search bar labeled 'Search Setup' and a menu with options like 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'SETUP > OBJECT MANAGER' and 'Item'. On the left, a sidebar lists various setup categories, with 'Page Layouts' selected. The main panel displays 'Page Layouts' with a 'Quick Find' search bar and buttons for 'New' and 'Page Layout Assignment'. Below this, a table lists three page layouts:

| PAGE LAYOUT NAME... | CREATED BY | MODIFIED BY | |
|------------------------|----------------------------------|-----------------------------------|---|
| Item Layout | Renuga sri R, 8/31/2025, 1:53 AM | Renuga sri R, 8/31/2025, 11:13 PM | ▼ |
| Page Layout for Gold | Renuga sri R, 9/1/2025, 6:48 AM | Renuga sri R, 9/1/2025, 6:53 AM | ▼ |
| Page Layout for Silver | Renuga sri R, 9/1/2025, 6:59 AM | Renuga sri R, 9/1/2025, 7:01 AM | ▼ |

Record Types –Record types are a way of grouping many records of one type for that object. Record types allow administrators to create a different page layout with custom picklist fields and values for the same business process and various business processes.



User Adoption –you perform user management tasks like creating and editing users, resetting passwords, granting permissions, configuration data access and much more.

The screenshot displays the Salesforce Lightning interface for the 'Jewellery Inventory' app. The browser address bar shows 'elop.lightning.force.com'. The app navigation bar includes 'Jewellery Inventory ...', 'Jewel Customers', 'Items', 'Prices', 'Orders', 'Billings', 'Reports', and 'More'. The 'Jewel Customers' section is active, showing a list of 10 items. The list is titled 'Recently Viewed' and includes a search bar and action buttons: 'New', 'Import', 'Change Owner', and 'Assign Label'. The list contains the following customer names:


| | <input type="checkbox"/> Customer name | |
|----|--|---|
| 1 | <input type="checkbox"/> durga | ▼ |
| 2 | <input type="checkbox"/> pavi | ▼ |
| 3 | <input type="checkbox"/> rasika | ▼ |
| 4 | <input type="checkbox"/> suji | ▼ |
| 5 | <input type="checkbox"/> gowsik | ▼ |
| 6 | <input type="checkbox"/> gowtham | ▼ |
| 7 | <input type="checkbox"/> moorthy | ▼ |
| 8 | <input type="checkbox"/> dhanam | ▼ |
| 9 | <input type="checkbox"/> Renuga | ▼ |
| 10 | <input type="checkbox"/> Sample 1 | ▼ |








3.IMPLEMENTATION Profiles –A Profile is a group of setting and permission that define what a user can do. Profile controls “object permission, field permission, user permission, tab setting, app setting, apex class access, page layout, record types”.

The screenshot shows the Salesforce Lightning Setup interface. The browser address bar displays 'elop.lightning.force.com'. The Setup menu is open, and the 'Profiles' page is selected. The page title is 'SETUP Profiles'. A search bar at the top of the page contains the text 'Search Setup'. The left sidebar shows the 'Setup' menu with 'Profiles' selected. The main content area displays a list of profiles with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The list includes various system profiles like 'Analytics Cloud Integration User', 'Authenticated Website', and 'Contract Manager', as well as custom profiles like 'Custom: Marketing Profile' and 'Custom: Sales Profile'. The 'Custom' column has checkboxes indicating whether a profile is custom.

| Action | Profile Name | User License | Custom |
|--|---|----------------------------------|-------------------------------------|
| Edit Clone | Analytics Cloud Integration User | Analytics Cloud Integration User | <input type="checkbox"/> |
| Edit Clone | Analytics Cloud Security User | Analytics Cloud Integration User | <input type="checkbox"/> |
| Edit Clone | Anypoint Integration | Identity | <input type="checkbox"/> |
| Edit Clone | Authenticated Website | Authenticated Website | <input type="checkbox"/> |
| Edit Clone | Authenticated Website | Authenticated Website | <input type="checkbox"/> |
| Edit Del ... | B2B Reordering Portal Buyer Profile | External Apps Login | <input checked="" type="checkbox"/> |
| Edit Clone | Chatter External User | Chatter External | <input type="checkbox"/> |
| Edit Clone | Chatter Free User | Chatter Free | <input type="checkbox"/> |
| Edit Clone | Chatter Moderator User | Chatter Free | <input type="checkbox"/> |
| Edit Clone | Contract Manager | Salesforce | <input type="checkbox"/> |
| Edit Clone | Cross Org Data Proxy User | XOrg Proxy User | <input type="checkbox"/> |
| Edit Del ... | Custom: Marketing Profile | Salesforce | <input checked="" type="checkbox"/> |
| Edit Del ... | Custom: Sales Profile | Salesforce | <input checked="" type="checkbox"/> |
| Edit Del ... | Custom: Support Profile | Salesforce | <input checked="" type="checkbox"/> |
| Edit Clone | Customer Community Login User | Customer Community Login | <input type="checkbox"/> |
| Edit Clone | Customer Community Plus Login... | Customer Community Plus Login | <input type="checkbox"/> |
| Edit Clone | Customer Community Plus User | Customer Community Plus | <input type="checkbox"/> |
| Edit Clone | Customer Community User | Customer Community | <input type="checkbox"/> |
| Edit Clone | Customer Portal Manager Custom | Customer Portal Manager Custom | <input type="checkbox"/> |
| Edit Clone | Customer Portal Manager Standard | Customer Portal Manager Standard | <input type="checkbox"/> |
| Edit Clone | Einstein Agent User | Einstein Agent | <input type="checkbox"/> |
| Edit Clone | External Apps Login User | External Apps Login | <input type="checkbox"/> |
| Edit Clone | External Identity User | External Identity | <input type="checkbox"/> |
| Edit Clone | Force.com - App Subscription User | Force.com - App Subscription | <input type="checkbox"/> |
| Edit Clone | Force.com - Free User | Force.com - Free | <input type="checkbox"/> |

The lightning app –It is used to create a CRM Application for jewel management, which show as a dashboard in that it allows us to provide the data, reports, etc....,



Setup

Home

Object Manager

App manager

Apps

App Manager

External Client Apps

External Client App Manager

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

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

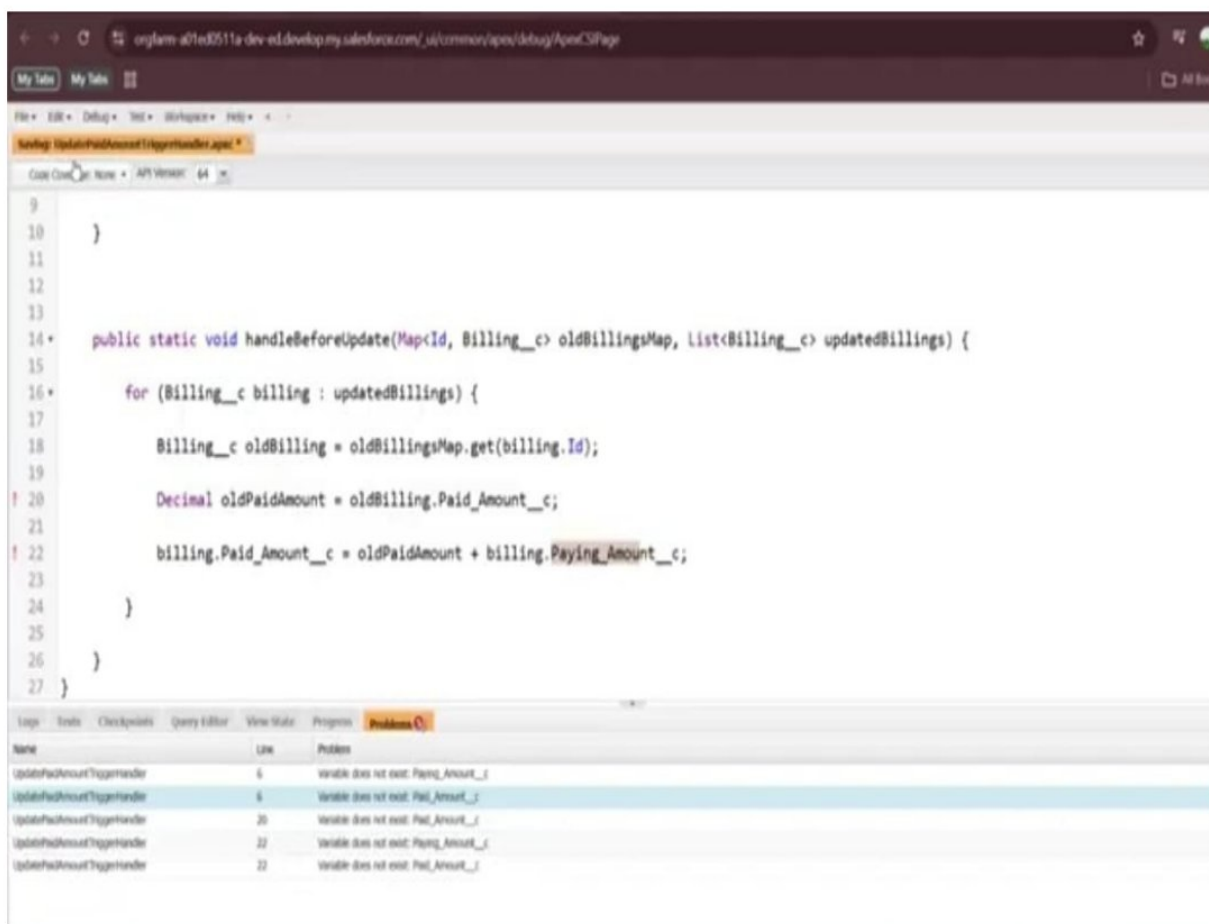
| | App Name | Developer N... | Description | Last Modifie... | App ... | VI... | |
|----|---------------------|--------------------|---------------------|-------------------|-----------|-------|--|
| 1 | All Tabs | AllTabSet | | 8/24/2025, 2:2... | Classic | | |
| 2 | Analytics Studio | Insights | Build CRM Anal... | 8/24/2025, 2:2... | Classic | ✓ | |
| 3 | App Launcher | AppLauncher | App Launcher t... | 8/24/2025, 2:2... | Classic | ✓ | |
| 4 | Approvals | Approvals | Manage appro... | 8/24/2025, 2:2... | Lightning | ✓ | |
| 5 | Automation | FlowsApp | Automate busi... | 8/24/2025, 2:2... | Lightning | ✓ | |
| 6 | Bolt Solutions | LightningBolt | Discover and ... | 8/24/2025, 2:2... | Lightning | ✓ | |
| 7 | Community | Community | Salesforce CR... | 8/24/2025, 2:2... | Classic | ✓ | |
| 8 | Content | Content | Salesforce CR... | 8/24/2025, 2:2... | Classic | ✓ | |
| 9 | Data Cloud | Audience360 | Build a thoroug... | 8/24/2025, 2:2... | Lightning | ✓ | |
| 10 | Data Manager | DataManager | Use Data Mana... | 8/24/2025, 2:2... | Lightning | ✓ | |
| 11 | Digital Experien... | SalesforceCMS | Manage conte... | 8/24/2025, 2:2... | Lightning | ✓ | |
| 12 | Jewellery Inven... | Jewellery_Inve... | Elevate your lo... | 8/31/2025, 2:2... | Lightning | ✓ | |
| 13 | Lightning Usag... | LightningInstru... | View Adoption ... | 8/24/2025, 2:2... | Lightning | ✓ | |
| 14 | Marketing CRM... | Marketing | Track sales an... | 8/24/2025, 2:2... | Classic | ✓ | |
| 15 | My Service Jou... | MSJApp | Discover new c... | 8/24/2025, 2:2... | Lightning | ✓ | |
| 16 | Platform | Platform | The fundament... | 8/24/2025, 2:2... | Classic | | |
| 17 | Queue Manage... | QueueManage... | Create and ma... | 8/24/2025, 2:2... | Lightning | ✓ | |
| 18 | Sales | Sales | The world's mo... | 8/24/2025, 2:2... | Classic | | |
| 19 | Sales | LightningSales | Manage your s... | 8/24/2025, 2:2... | Lightning | ✓ | |
| 20 | Sales Cloud Mo... | SalesCloudMob... | New seller foc... | 8/24/2025, 2:2... | Lightning | ✓ | |
| 21 | Sales Console | LightningSales... | (Lightning Exp... | 8/24/2025, 2:2... | Lightning | ✓ | |
| 22 | Salesforce Cha... | Chatter | The Salesforce... | 8/24/2025, 2:2... | Classic | ✓ | |
| 23 | Salesforce Sch... | LightningSched... | Set up persona... | 8/24/2025, 2:2... | Lightning | ✓ | |
| 24 | Service | Service | Manage custo... | 8/24/2025, 2:2... | Classic | ✓ | |
| 25 | Service Console | LightningService | (Lightning Exp... | 8/24/2025, 2:2... | Lightning | ✓ | |
| 26 | Site.com | Sites | Build pixel-perf... | 8/24/2025, 2:2... | Classic | | |
| 27 | Subscription M... | RevenueCloudC... | Get started aut... | 8/24/2025, 2:2... | Lightning | ✓ | |

Text field: A Text field is used whenever you need to capture describe or alphanumeric details that identify, describe, or provide context about jewel items, supplier, or transaction.

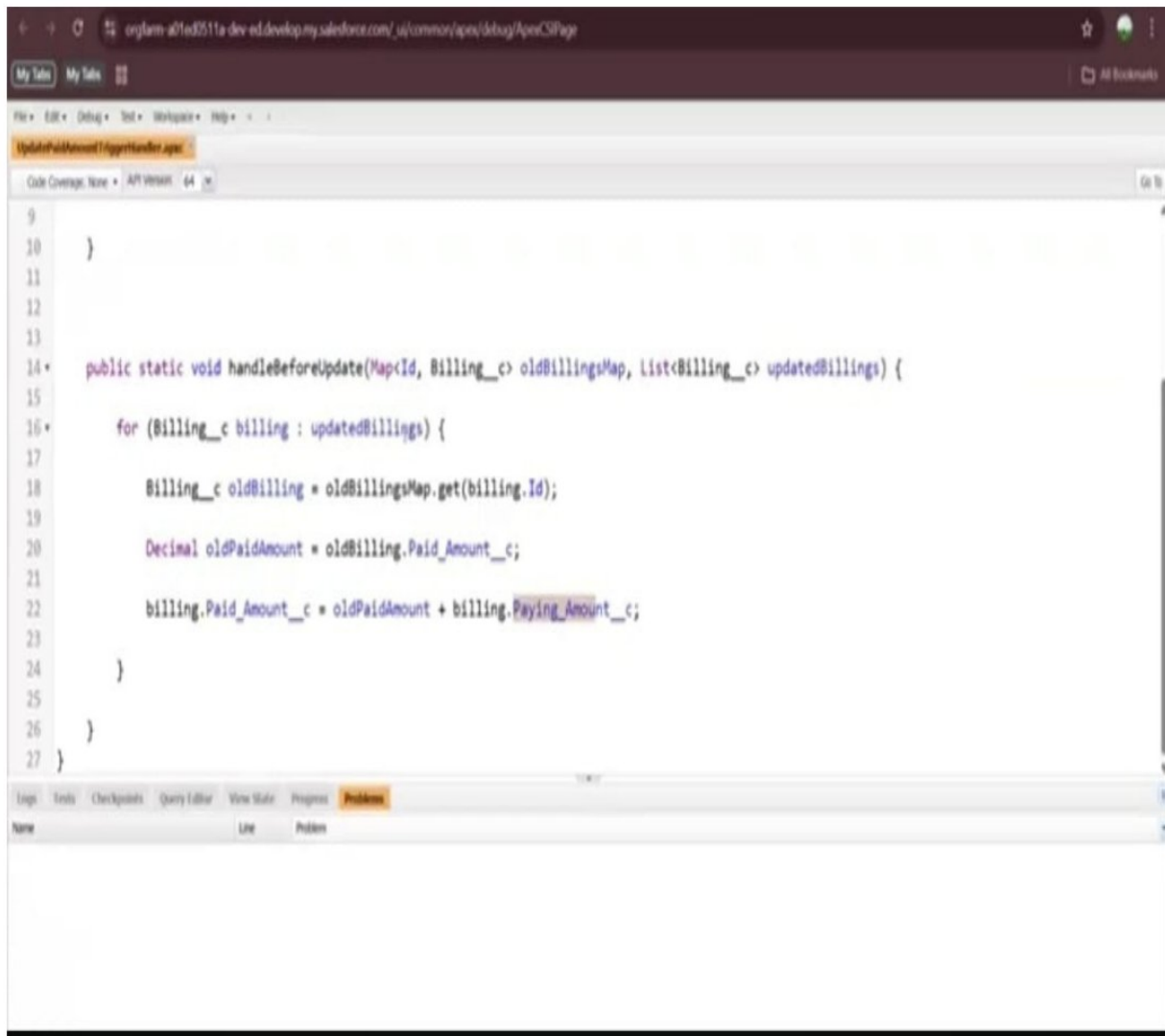
Apex class –auto calculate total cost from order items.



Apex trigger –auto calculate total cost from order item.



Error handling: Resolved the issues “paying amount”, “paid amount” not found in the field, so create these fields.



The screenshot shows the Salesforce IDE interface. The browser address bar displays the URL: `orgnam-a01ed0511a-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSPage`. The file explorer on the left shows the file `UpdatePaidAmountTriggerHandler.apex`. The code editor displays the following Apex code:

```
9  
10 }  
11  
12  
13  
14 public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap, List<Billing__c> updatedBillings) {  
15  
16     for (Billing__c billing : updatedBillings) {  
17  
18         Billing__c oldBilling = oldBillingsMap.get(billing.Id);  
19  
20         Decimal oldPaidAmount = oldBilling.Paid_Amount__c;  
21  
22         billing.Paid_Amount__c = oldPaidAmount + billing.Paying_Amount__c;  
23  
24     }  
25  
26 }  
27 }
```

The bottom of the IDE shows a tab labeled `Problems`, which is currently empty.

Result

Output screenshots to be inserted.

Permission sets: Permission sets in CRM Application for jewel management are used to give additional access to users to users without changing their profile. They allow specific staff to perform extra tasks like updating stock, purchase order, or viewing reports when needed.

Flows: flows in CRM Application for jewel management system are used to automate processes like updating stock after a purchase order, sending alerts for low inventory or expired stocks, and reducing manual work to improve accuracy and efficiency.

Setup

Home

Object Manager

Users

Permission Set Groups

Permission Sets

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

SETUP

Permission Sets

Permission Sets

Help for this Page

On this page you can create, view, and manage permission sets.

All Permission Sets

Edit | Delete | Create New View

New

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y






Z


Other








All


| Action | Permission Set Name | Description | License |
|--------|---|---|-----------------------------------|
| | (Legacy) Data Cloud Data Aware Spe... | This Data Cloud permission set will b... | Customer Data Platform |
| | (Legacy) Data Cloud Marketing Admin | Allows access to Data Cloud Setup if ... | Customer Data Cloud for Marketi |
| | (Legacy) Data Cloud Marketing Mana... | This Data Cloud permission set will b... | Customer Data Platform |
| | (Legacy) Data Cloud Marketing Speci... | This Data Cloud permission set will b... | Customer Data Platform |
| | (Legacy) Data Cloud for Marketing Da... | This Data Cloud permission set will b... | Customer Data Cloud for Marketi |
| | (Legacy) Data Cloud for Marketing M... | This Data Cloud permission set will b... | Customer Data Cloud for Marketi |
| | (Legacy) Data Cloud for Marketing Sp... | This Data Cloud permission set will b... | Customer Data Cloud for Marketi |
| | Access Agentforce Default Agent | Gives users access to the default Age... | Agentforce (Default) |
| | Agent Platform Builder | Allow access to agent platform. | Agent platform builder |
| | Agentforce Default Admin | Allows users to build and manage in... | Agentforce (Default) |
| | Agentforce Service Agent Configurati... | Build and manage autonomous AI ser... | Agentforce Service Agent Builder |
| | Agentforce Service Agent Object Acc... | Access knowledge articles and mana... | Agentforce Service Agent User |
| | Agentforce Service Agent Secure Base | Set up and use Agentforce Service Ag... | Agentforce Service Agent User |
| | Agentforce Service Agent User | Analyze topics and perform actions a... | Agentforce Service Agent User |
| | Authenticated Payer | An authenticated external user with t... | Salesforce Payments External |
| | Buyer | Allows access to the store. Lets user... | B2B Buyer Permission Set One Se |
| | Buyer Manager | Includes all Buyer capabilities, and all... | B2B Buyer Manager Permission S |
| | C360 High Scale Flow Integration User | Allows integration user to access feat... | Cloud Integration User |
| | CRM User | Denotes that the user is a Sales Clou... | CRM User |
| | Code Builder User | Enables the user to create and acces... | Code Builder |
| | Commerce Admin | Allow access to commerce admin fea... | Commerce Admin Permission Set |
| | Commerce Session | Allow access to session-based permi... | Commerce Session Permission S |
| | ConnectivityServiceCASCPermSet | | Cloud Integration User |
| | Contact Center Admin | Manage Service Cloud Voice contact ... | Service Cloud Voice User |
| | Contact Center Admin (Partner Telep... | Manage Service Cloud Voice contact ... | Service Cloud Voice User (Partner |


Dashboard: Dashboard help you visually understand changing business






Jewellery Inventory ...

Jewel Customers ▾


Items ▾


Prices ▾

Orders ▾

Dashboards ▾

More ▾




Dashboard
dashboards 1

Refresh



Edit

Subscribe ▾

⚠ Last refreshed 3 days ago. Refresh this dashboard to see the latest data.

As of Sep 2, 2025, 9:05 AM: Viewing as Renuga sri R

New Prices Report

| Price: Price Id...↑ | Gold Pri... | Price: ID |
|---------------------|-------------|-----------------|
| Price-01 | \$312 | a04gL000009Vqy1 |
| Price-02 | \$4 | a04gL000009Vr2r |
| Price-03 | \$5 | a04gL000009Vr4T |
| Price-04 | \$5 | a04gL000009Vr65 |
| Price-05 | \$6 | a04gL000009Vr7h |
| Price-06 | \$5 | a04gL000009VmmM |
| Price-07 | \$5 | a04gL000009Vr9J |

[View Report \(New Prices ...](#)
As of Sep 2, 2025, 9:05 AM

4

Jewellery Inventory ...

Jewel Customers ▾

Items ▾

Prices ▾

Orders ▾

Billings ▾

Reports ▾

More ▾

Report: Prices

New Prices Report

Enable Field Editing

Q

Add Chart

▾

↺

Edit ▾

Total Records

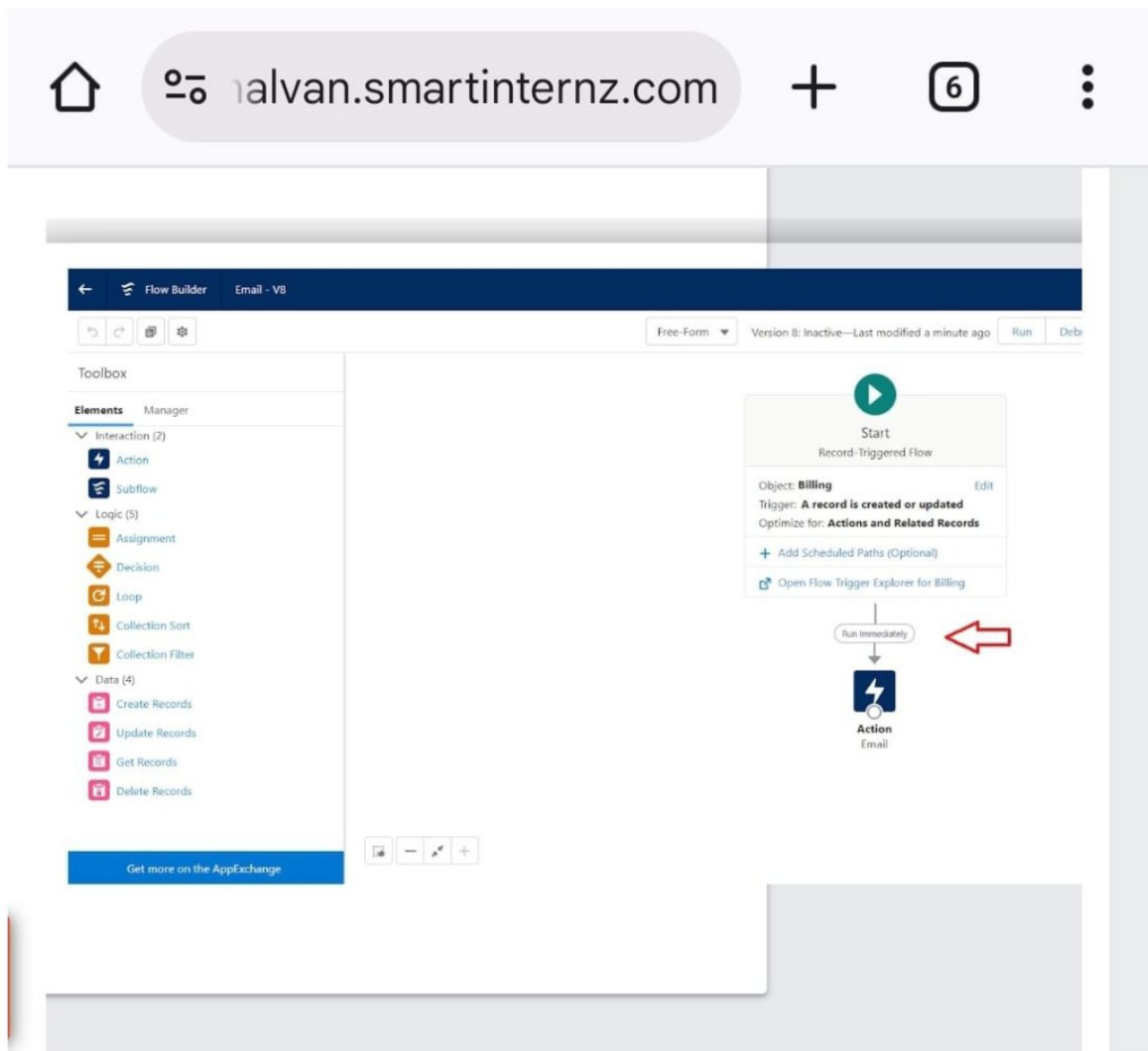
10

Total Gold Price

\$358

| | Price: Price Id ▾ | Gold Price ▾ | Price: ID ▾ |
|----|-------------------|--------------|-----------------|
| 1 | Price-06 | \$5 | a04gL000009VmmM |
| 2 | Price-01 | \$312 | a04gL000009Vqy1 |
| 3 | Price-02 | \$4 | a04gL000009Vr2r |
| 4 | Price-03 | \$5 | a04gL000009Vr4T |
| 5 | Price-04 | \$5 | a04gL000009Vr65 |
| 6 | Price-05 | \$6 | a04gL000009Vr7h |
| 7 | Price-07 | \$5 | a04gL000009Vr9J |
| 8 | Price-08 | \$8 | a04gL000009VrAv |
| 9 | Price-09 | \$5 | a04gL000009VrCX |
| 10 | Price-10 | \$3 | a04gL000009VrE9 |
| 11 | | \$358 | |

Flows: A Flow is a powerful tool that allow you to automate business processes, collect and update data, and guide user through a series of screens or steps.



4. Advantages and disadvantage

Advantage

CRM helps manage customer data, allowing jewel to understand individual preferences and offer tailored recommendations and services, leading to a better customer experience.

The CRM With detailed customer profiles and buying history, jewel can identify profitable customer segments and create targeted marketing campaigns, increasing conversion rates.

CRM can integrate with inventory and sales systems, providing a consolidated view of stock and customer interactions, which streamlines operations.

Disadvantage

Implementing a CRM system can involve significant costs for software, customization, and initial training, which might be a barrier for smaller businesses.

Storing sensitive customer and inventory data in a centralized database raises concerns about potential breaches or unauthorized access, requiring strong security measures.

Staff may resist adopting new technology and workflows, especially if they are unfamiliar with the system or perceive it as a threat to their

5 .C onclusion

it is a business strategy and toolset for building strong, lasting customer relationships through centralized data, personalized experiences, and streamlined processes, ultimately driving growth, profitability, and customer loyalty. By providing valuable insights and automating tasks, CRM helps businesses foster trust, understand customer needs, and deliver superior value, making it a cornerstone of successful, customer-centric operations