

# **CRM Application for Jewel Management-(Developer)**

**Project Title** : CRM Application for Jewel Management-(Developer)

**College** : Ideal Institute of Technology

**Team ID** : LTVIP2025TMID31434

**Team Size** : 4

## **Team Members Details:**

**1. Team Leader** : Bobbadi Harshitha

**Email** : [Bobbadiharshitha4@gmail.com](mailto:Bobbadiharshitha4@gmail.com)

**2. Team Member** : Adireddy Mahesh

**Email** : [adireddymahesh1@gmail.com](mailto:adireddymahesh1@gmail.com)

**3. Team Member** : Akula Sai Sandeep

**Email** : [Ss667775441@gmail.com](mailto:Ss667775441@gmail.com)

**4. Team Member** : Anakapalli Siva Shankar

**Email** : [shankaranakapalli88@gmail.com](mailto:shankaranakapalli88@gmail.com)

# **1. INTRODUCTION**

## **1.1 Project Overview:**

This project involves the development of a CRM-based Jewel Management System using Salesforce. It streamlines operations like inventory tracking, price updates, billing, and customer management for a jewelry business. The project leverages Salesforce Lightning Platform to design custom objects, automate processes using Flows, and generate actionable insights via dashboards and reports.

## **1.2 Purpose:**

The purpose is to replace manual processes with an automated, cloud-based Salesforce CRM that enables real-time stock updates, dynamic pricing, customer billing, and order tracking. The system enhances customer experience, operational accuracy, and business decision-making.

The purpose of this project is to design and implement a Salesforce-based CRM solution specifically for jewel businesses to:

- Centralize customer information and communication.
- Track and manage jewelry inventory(gold and silver).
- Enable personalized marketing and offers.
- Facilitate efficient order processing and billing.
- Improve customer retention through engagement automation.
- Generate detailed reports on sales, trends, and staff performance.

# **2. IDEATION PHASE**

## **2.1 Problem Statement:**

Traditional jewelry shops face problems like manual stock maintenance, lack of customer records, and inefficiencies in pricing and billing. There's also no integrated view of customer interactions. This leads to errors, delayed decision-making, and customer dissatisfaction.

Many small to mid-sized jewelry retailers struggle with managing customer relationships, tracking sales, handling special orders, and maintaining inventory. Current manual systems or generic software often fall short of addressing the industry's unique needs.

## **2.2 Empathy Map Canvas:**

### **Think & Feel**

- “Are we missing out on leads because we’re not following up?”
- “I need to know who our high-value customers are.”

### **Hear**

- “The customer wasn’t happy with the delay in their custom order.”
- “Can we send reminders for anniversaries and birthdays?”

### **See**

- Registers with scribbled orders.
- Multiple Excel sheets for billing and inventory.

### **Say & Do**

- “Call them about the pendant order tomorrow.”
- “Print out last year’s top customers list.”

### **Pain**

- Losing customers due to lack of follow-up.
- No real-time inventory tracking.

### **Gain**

- Higher customer satisfaction.
- More repeat purchases via automation.

## **2.3 Brainstorming:**

The brainstorming phase focused on collecting diverse ideas from stakeholders—including jewel store owners, sales representatives, developers, and end-users—to define potential solutions and functionalities required in the CRM application. This collaborative ideation process aimed to understand the operational bottlenecks in the jewelry business and how Salesforce's cloud ecosystem could streamline them.

Ideas collected during brainstorming:

- Use of custom objects for Items, Billing, Orders, and Customers.
- Automate stock management with flows.
- Dashboard for daily performance insights.
- Notifications for low inventory.
- Implement record-triggered and scheduled flows.
- Introduce validation rules to prevent data inconsistencies.
- Plan separate dashboards for different roles (sales, inventory, admin).

## **3. Requirement Analysis:**

### **3.1 Customer Journey Map:**

The customer journey map outlines the stages a customer experiences, from the first interaction to post-purchase engagement. It helps identify gaps and opportunities where the CRM can automate and enhance customer experience.

#### **Awareness Stage**

- Customer browses website or social media.
- CRM captures leads using Web-to-Lead forms.

#### **Consideration Stage**

- Customer visits the store or requests a catalog.
- Salesforce auto-assigns a sales representative.
- Email/SMS with product recommendations is triggered.

#### **Purchase Stage**

- Customer places an order (in-store or online).
- CRM logs order and creates a sales opportunity.
- Invoice is generated using built-in templates.

### **Delivery Stage**

- Customer receives order.
- CRM sends order tracking notifications and confirmations.

### **Post-Purchase Stage**

- Customer receives feedback form.
- Loyalty points are updated.
- Follow-up reminders for anniversaries, birthdays, etc.

### **3.2 Solution Requirements:**

Defines both the functional (what the system should do) and non-functional (how the system performs) needs to fulfill business goals.

- Real-time item stock tracking
- Dynamic pricing management
- Billing with automated tax calculations
- Comprehensive dashboards and reports
- Data security and accessibility
- Integration with communication tools (email/SMS)
- Record ownership for audit and traceability

### **3.3 Data Flow Diagrams:**

DFD illustrates how data moves between the system's components. This helps developers visualize dependencies and database interaction points.

#### **Main Entities & Data Flow Points:**

1. Customer submits a product inquiry.

2. Data flows to CRM Interface (Form or App).
3. CRM creates or updates Customer Object.
4. CRM logs sale and updates Sales Record.
5. Inventory count is adjusted in the Inventory Object.
6. Reports are updated to reflect real-time sales and stock.

### **3.4 Technology Stack:**

Defines the tools and platforms used to develop, deploy, and manage the CRM system in Salesforce.

- Platform: Salesforce Lightning Experience.
- Logic: Apex Triggers, Validation Rules, Flow Builder.
- UI: Lightning Tabs, Pages, Reports, Dashboards.
- Database: Salesforce Standard & Custom Objects.
- Integration: Email Templates, Scheduled Flows, Approval Processes.

## **4.PROJECT DESIGN**

### **4.1 Problem Solution Fit:**

**Problem:** Manual processes and lack of centralized tracking

**Solution:** Salesforce CRM system automating every major jewelry workflow

### **4.2 Proposed Solution:**

**Five major custom objects:** Item\_\_c, Price\_\_c, Jewel\_Customer\_\_c, Customer\_Order\_\_c, Billing\_\_c

- Lightning app with navigation tabs
- Automated flows for inventory, billing, and notifications
- Dashboards visualizing sales, stock, and revenue performance

### **4.3: Solution Architecture:**

#### **Objects and Relationships:**

- Jewel\_Customer\_\_c ↔ Customer\_Order\_\_c ↔ Billing\_\_c ↔ Item\_\_c ↔ Price\_\_c
- Lookup and Master-Detail fields used to link records
- Formula fields for auto-calculations (e.g., total billing amount)
- Validation rules for quantity and price limits

- Record Types to distinguish Gold, Silver, and Diamond workflows

## 5. PROJECT PLANNING AND SCHEDULING

### 5.1 Project Planning:

The planning and scheduling phase involves defining the project's timeline, scope, team responsibilities, tools, and milestones. It ensures the project stays on track and aligns with business goals while delivering the CRM application in an efficient, scalable, and phased manner.

- Week 1: Requirement gathering, Use Case and ER Diagrams
- Week 2: Custom object creation, Page Layouts and Tab Setup
- Week 3: Flows and Automation Setup, Validation Rules
- Week 4: Reports and Dashboards, Testing and Review
- Week 5: Final Deployment, Documentation and User Training

## 6. PROJECT DEVELOPMENT PHASE - SALESFORCE GUIDED PROJECT

The development phase is the backbone of the CRM application, where core functionalities were implemented using Salesforce's declarative tools and programmatic capabilities. This phase was conducted in iterative sprints, following Agile methodology, and broken into several key activities.

### 6.1 Developer Environment Setup:

- Create Salesforce Developer Org via [developer.salesforce.com/signup](https://developer.salesforce.com/signup)

Fill the required information, verify email, set password, and access Salesforce Setup.

 **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  Last name

Job title  Work email

Company  Country/Region

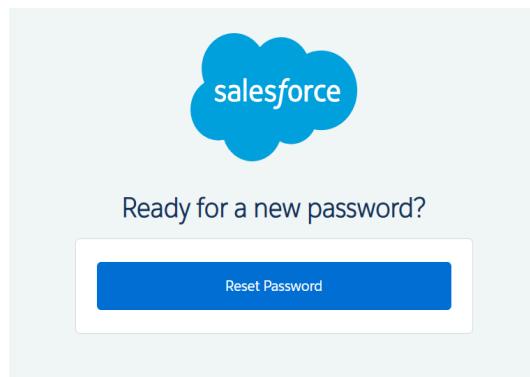
Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

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.

We value your privacy. To learn more, visit our [Privacy Statement](#).

I'm not a robot  reCAPTCHA Privacy • Terms

**Sign Me Up**





## Change Your Password

Enter a new password for **streetcause178@sb.com**.  
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

\* New Password

Good

\* Confirm New Password

\* Security Question

In what city were you born?

\* Answer

\*=required

Password was last changed on 6/20/2025, 3:59 AM.

## 6.2 Custom Object Creation:

We create five main custom objects for Jewel Customer, Item, Customer Order, Price, Billing.

### 1. Jewel Customer

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main area displays the 'Jewel Customer' object details. The left sidebar lists various configuration tabs: 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, and List View Button Layout. The right panel shows the 'Details' tab for 'Jewel Customer'. It includes fields for API Name (Jewel\_Customer\_\_c), Singular Label (Jewel Customer), Plural Label (Jewel Customers), and several checkboxes for reporting, tracking, and deployment.

Setting	Value
API Name	Jewel_Customer__c
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

## 2. Item

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main area displays the 'Item' object details. The left sidebar lists various configuration tabs: 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, and List View Button Layout. The right panel shows the 'Details' tab for 'Item'. It includes fields for API Name (Item\_\_c), Singular Label (Item), Plural Label (Items), and several checkboxes for reporting, tracking, and deployment.

Setting	Value
API Name	Item__c
Singular Label	Item
Plural Label	Items
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

### 3. Customer Order

The screenshot shows the Salesforce Setup interface for the 'Customer Order' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The search bar says 'Search Setup'. The main title is 'Customer Order' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various configuration tabs: 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, and List View Button Layout. The 'Details' tab is selected. The main content area displays the following details:

Details	
Description	
API Name	Customer_Order_c
Custom	✓
Singular Label	Customer Order
Plural Label	Customer Orders
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons 'Edit' and 'Delete' are located in the top right corner of the main content area.

### 4. Price

The screenshot shows the Salesforce Setup interface for the 'Price' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The search bar says 'Search Setup'. The main title is 'Price' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various configuration tabs: 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, and List View Button Layout. The 'Details' tab is selected. The main content area displays the following details:

Details	
Description	
API Name	Price_c
Custom	✓
Singular Label	Price
Plural Label	Prices
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons 'Edit' and 'Delete' are located in the top right corner of the main content area.

## 5. Billing

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Billing'. On the left, a sidebar lists various configuration options under '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, and List View Button Layout. The right panel displays the 'Details' section for the Billing object. It includes fields for API Name ('Billing\_\_c'), Singular Label ('Billing'), Plural Label ('Billings'), and several checkboxes for reporting and tracking features like 'Enable Reports' (checked), 'Track Activities', and 'Track Field History'. Deployment status is listed as 'Deployed'.

## 6.3 Creation of Tabs

We create five main custom tabs for Jewel Customer, Item, Customer Order, Price, Billing.

### 1. Jewel Customer

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > TABS'. The left sidebar has sections for 'User Interface' and 'Tabs', with 'Tabs' selected. A search bar at the top says 'Q: tabs'. The main content area shows a 'Custom Object Tab' named 'Jewel Customers'. Below it, a message says 'Below is the information for the custom tab. Click Edit to change the custom tab.' A 'Custom Tab Definition Detail' table is shown with the following data:

Tab Label	Jewel Customers	Tab Style	Airplane
Object	Jewel Customer	Description	Splash Page Custom Link
Created By	Bobbadi Harshitha Team	Modified By	Bobbadi Harshitha Team
	6/22/2025, 8:13 AM		6/22/2025, 8:13 AM

## 2. Item

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar has sections for 'User Interface' (selected), 'Rename Tabs and Labels', and 'Tabs'. A search bar at the top says 'Search Setup'. The main content area is titled 'Custom Object Tab Items' and displays a table for a tab named 'Item'. The table columns are 'Tab Label' (Item) and 'Items'. It shows one item row for 'Item'. The 'Tab Style' is set to 'Alarm clock'. The 'Splash Page Custom Link' is also visible.

Tab Label	Items
Item	

Tab Style: Alarm clock

Splash Page Custom Link

## 3. Customer Order

The screenshot shows the Salesforce Setup interface with the 'Customer Orders' tab selected. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar has sections for 'User Interface' (selected), 'Rename Tabs and Labels', and 'Tabs'. A search bar at the top says 'Search Setup'. The main content area is titled 'Custom Object Tab Customer Orders' and displays a table for a tab named 'Customer Orders'. The table columns are 'Tab Label' (Customer Orders) and 'Items'. It shows one item row for 'Customer Order'. The 'Tab Style' is set to 'Bell'. The 'Splash Page Custom Link' is also visible.

Tab Label	Items
Customer Orders	

Tab Style: Bell

Splash Page Custom Link

## 4. Price

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A sidebar on the left has sections for 'User Interface' and 'Tabs'. The main content area is titled 'Tabs' and shows a 'Custom Object Tab' named 'Prices'. The 'Tab Definition Detail' table contains the following information:

Tab Label	Prices	Edit	Delete
Object	Price		
Description			
Created By	<a href="#">Bobbadi Harshitha Team</a> 6/22/2025, 8:20 AM		
Modified By	<a href="#">Bobbadi Harshitha Team</a> 6/22/2025, 8:20 AM		

The 'Tab Style' is set to 'Fan'.

## 5.Billing

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A sidebar on the left has sections for 'User Interface' and 'Tabs'. The main content area is titled 'Tabs' and shows a 'Custom Object Tab' named 'Billings'. The 'Tab Definition Detail' table contains the following information:

Tab Label	Billings	Edit	Delete
Object	Billing		
Description			
Created By	<a href="#">Bobbadi Harshitha Team</a> 6/22/2025, 8:22 AM		
Modified By	<a href="#">Bobbadi Harshitha Team</a> 6/22/2025, 8:22 AM		

The 'Tab Style' is set to 'Boat'.

So we get the required all custom tabs as below

Action	Label	Tab Style	Description
Edit   Del	Billings	Boat	
Edit   Del	Customer Orders	Bell	
Edit   Del	Items	Alarm clock	
Edit   Del	Jewel Customers	Airplane	
Edit   Del	Prices	Fan	

**Web Tabs**

New What Is This?

No Web Tabs have been defined.

## 6.4 Creation of Lightning App

**App Name:** Jewelry Inventory System

**App Details & Branding**

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

**App Details**

\* App Name

\* Developer Name

Description

**App Branding**

Image

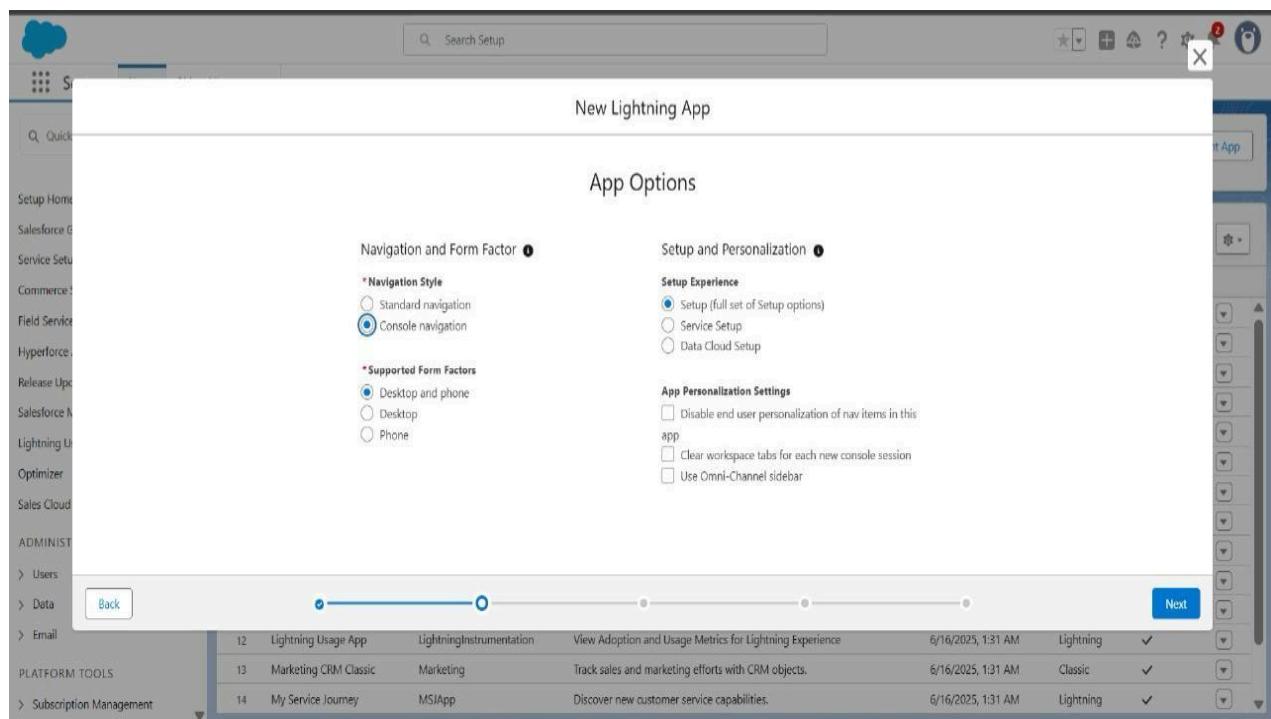
Primary Color Hex Value

Org Theme Options

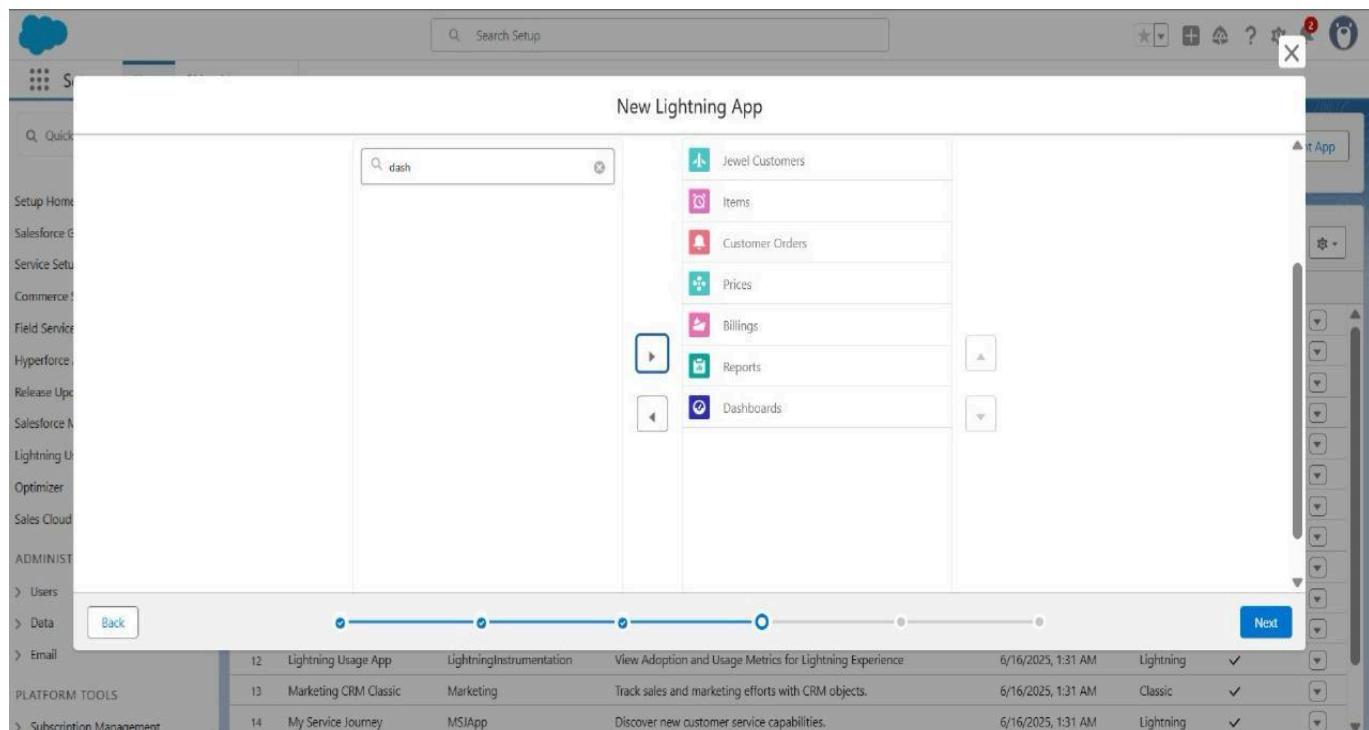
Use the app's image and color instead of the org's custom theme.

**App Launcher Preview**

jewelry Inventory System  
jewelry\_Inventory\_System  
Elevate your look with elegance



## Navigation Items



## 6.5 Creation of Fields

### 1. Creating lookup relationship

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

The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "Customer Order New Relationship" and "Step 3. Enter the label and name for the lookup field". It contains fields for Field Label (Customer), Field Name (Customer), Description, and Help Text. Below these, there's a section for "Child Relationship Name" (Customer\_Orders) and "Required" status. Under "What to do if the lookup record is deleted?", there are three radio button options: "Always require a value in this field in order to save a record" (unchecked), "Clear the value of this field. You can't choose this option if you make this field required." (selected), and "Don't allow deletion of the lookup record that's part of a lookup relationship." (unchecked). At the bottom, there are checkboxes for "Auto add to custom report type" and "Add this field to existing custom report types that contain this entry". Navigation buttons at the top right include Previous, Next, and Cancel.

The screenshot shows the Salesforce Setup interface for creating a new relationship, specifically Step 6 of 6 for adding custom related lists. The left sidebar is identical to the previous screenshot. The main area is titled "Customer Order New Relationship" and "Step 6. Add custom related lists". It displays the details of the previously created relationship: Field Label (Customer), Data Type (Lookup), Field Name (Customer), and Description. A note says "Specify the title that the related list will have in all of the layouts associated with the parent." followed by a "Related List Label" input field containing "Customer Orders". Below this, it says "Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout." There is a "Add Related List" section with a "Page Layout Name" dropdown containing "Jewel Customer Layout" and a checked checkbox for "Append related list to users' existing personal customizations". Navigation buttons at the top right include Previous, Save & New, Save, and Cancel.

## 2. Creating a Master-Detail Relationship

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

The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar is titled 'Customer Order' and includes options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main panel is titled 'Customer Order New Relationship' and is on 'Step 5 of 6'. It shows a field configuration for 'Item' with 'Master-Detail' as the Data Type. A list of page layouts is shown, with 'Customer Order Layout' selected. Navigation buttons at the bottom right include 'Previous', 'Next', and 'Cancel'.

The screenshot shows the Salesforce Setup interface for creating a new relationship, continuing from the previous step. The left sidebar is titled 'Customer Order' and includes options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main panel is titled 'Customer Order New Relationship' and is on 'Step 6 of 6'. It shows a field configuration for 'Item' with 'Master-Detail' as the Data Type. A related list configuration is shown, with 'Customer Orders' selected as the Related List Label. A checkbox for 'Append related list to users' existing personal customizations' is checked. Navigation buttons at the bottom right include 'Previous', 'Save & New', 'Save', and 'Cancel'.

### 3. Creating Text Field in Jewel Customer Object

The screenshot shows the 'New Custom Field' configuration page for the 'Jewel Customer' object. The 'Field Label' is set to 'City'. The 'Length' is specified as 20. The 'Field Name' is also 'City'. There is no 'Description' provided. Under 'Help Text', there is a large empty text area. In the 'Required' section, the 'Always require a value in this field in order to save a record' checkbox is unchecked. Under 'Unique', the 'Do not allow duplicate values' checkbox is checked, while 'Treat "ABC" and "abc" as duplicate values (case insensitive)' is selected. The 'External ID' section has 'Auto add to custom report type' checked and 'Add this field to existing custom report types that contain this entity' checked. The status bar at the top right indicates 'Step 2 of 4'.

The screenshot shows the 'Add to page layouts' step for the 'New Custom Field'. The field details are summarized: Field Label: City, Data Type: Text, Field Name: City, and Description: None. A note states that the field will be added as the last field in the first 2-column section of the selected page layouts. The 'Add Field' checkbox is checked, and the 'Page Layout Name' dropdown contains 'Jewel Customer Layout'. The status bar at the top right indicates 'Step 4 of 4'.

## 4. Creating the Phone field in object Jewel Customer

The screenshot shows the Salesforce Setup interface for creating a new custom field. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Jewel Customer'. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The 'Fields & Relationships' section is selected. The main content area is titled 'Jewel Customer New Custom Field' and 'Step 4. Add to page layouts'. It shows the field details: Field Label 'Phone', Data Type 'Phone', Field Name 'Phone', and Description. A note states: 'Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.' Below this, there's a list of page layouts: 'Add Field' and 'Page Layout Name' (checkboxes), and 'Jewel Customer Layout' (checkbox checked). At the bottom, it says 'When finished, click Save & New to create more custom fields, or click Save if you are done.' and 'Step 4 of 4'.

## 5. Creating the Email field in object Jewel Customer

The screenshot shows the Salesforce Setup interface for creating a new custom field. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Jewel Customer'. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The 'Fields & Relationships' section is selected. The main content area is titled 'Jewel Customer New Custom Field' and 'Step 4. Add to page layouts'. It shows the field details: Field Label 'Email', Data Type 'Email', Field Name 'Email', and Description. A note states: 'Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.' Below this, there's a list of page layouts: 'Add Field' and 'Page Layout Name' (checkboxes), and 'Jewel Customer Layout' (checkbox checked). At the bottom, it says 'When finished, click Save & New to create more custom fields, or click Save if you are done.' and 'Step 4 of 4'.

## 6. Creating the number field in Item object

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar is titled 'Item' and includes options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The 'Fields & Relationships' option is selected. The main panel is titled 'New Custom Field' and is on 'Step 4. Add to page layouts'. The field details are: Field Label 'Purity', Data Type 'Number', Field Name 'Purity', and Description empty. Under 'Page Layouts', 'Add Field' is checked for both 'Page Layout Name' and 'Item Layout'. At the bottom, it says 'When finished, click Save & New to create more custom fields, or click Save if you are done.' Navigation buttons at the top right include 'Help for this Page', 'Previous', 'Save & New', 'Save', and 'Cancel'.

## 7. Creating Picklist Field in Item Object

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar is titled 'Item' and includes options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The 'Fields & Relationships' option is selected. The main panel is titled 'New Custom Field' and is on 'Step 4. Add to page layouts'. The field details are: Field Label 'Item Type', Data Type 'Picklist', Field Name 'Item\_Type', and Description empty. Under 'Page Layouts', 'Add Field' is checked for both 'Page Layout Name' and 'Item Layout'. At the bottom, it says 'When finished, click Save & New to create more custom fields, or click Save if you are done.' Navigation buttons at the top right include 'Help for this Page', 'Previous', 'Save & New', 'Save', and 'Cancel'.

## 8. Creating Currency Field in Price Object

The screenshot shows the Salesforce Setup interface for creating a new custom field. The object is 'Price'. The field is named 'Gold Price' with a data type of 'Currency'. The security configuration table lists several user profiles, all of which have the 'Visible' checkbox checked.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## 9. Creating Formula Field(Cross Object) in Item Object

The screenshot shows the Salesforce Setup interface for creating a formula field. The object is 'Item'. The formula is defined as 'Gold Price (Currency) = Gross Margin - Amount - Cost / 10'. A sidebar titled 'Quick Tips' provides links to 'Getting Started' and 'Operators & Functions'.

**New Custom Field**

**Step 5. Add to page layouts** **Step 5 of 5**

Field Label	Gold Price
Data Type	Formula
Field Name	Gold_Price
Description	

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

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

Add Field  Page Layout Name  
 Item Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous

## 10. Creating Remaining Fields in Objects

Creating remaining fields in the objects

1.Jewel Customer : State, Street, Country, Zip/Postal code

**Jewel Customer**

**Fields & Relationships** **11 Items. Sorted by Field Label**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City_c	Text(20)		
Country	Country_c	Text(18)		
Created By	CreatedBy	Lookup(User)		
Customer Name	Name	Text(80)		✓
Email	Email_c	Email		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone_c	Phone		

Quick Find

## 2.Price : Silver Price

Setup > OBJECT MANAGER  
Price

**Fields & Relationships**  
6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Gold Price	Gold_Price__c	Currency(8, 5)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Price Id	Name	Auto Number		
Silver Price	Silver_Price__c	Currency(8, 5)		

## 3.Item : Field Label-Customer Name, Ornament, Weight, Stone Weight, Percentage, Stone/Other Price, Expected Days of Return, Priority, Silver Price, Purity Gold Price, Total weights, Amount, KDM, Making Charges.

Setup > OBJECT MANAGER  
Item

**Fields & Relationships**  
23 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Customer Name	Customer_Name__c	Lookup(Jewel Customer)		
Expected Days Of Return	Expected_Days_Of_Return__c	Picklist	Priority	
Gold Price	Gold_Price__c	Formula (Currency)		
Item Id	Name	Auto Number		
Item Type	Item_Type__c	Picklist		
KDM	KDM__c	Formula (Currency)		

#### 4.Customer Order: Order Status

The screenshot shows the Salesforce Object Manager interface for the 'Customer Order' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area displays the 'Fields & Relationships' section with 6 items. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

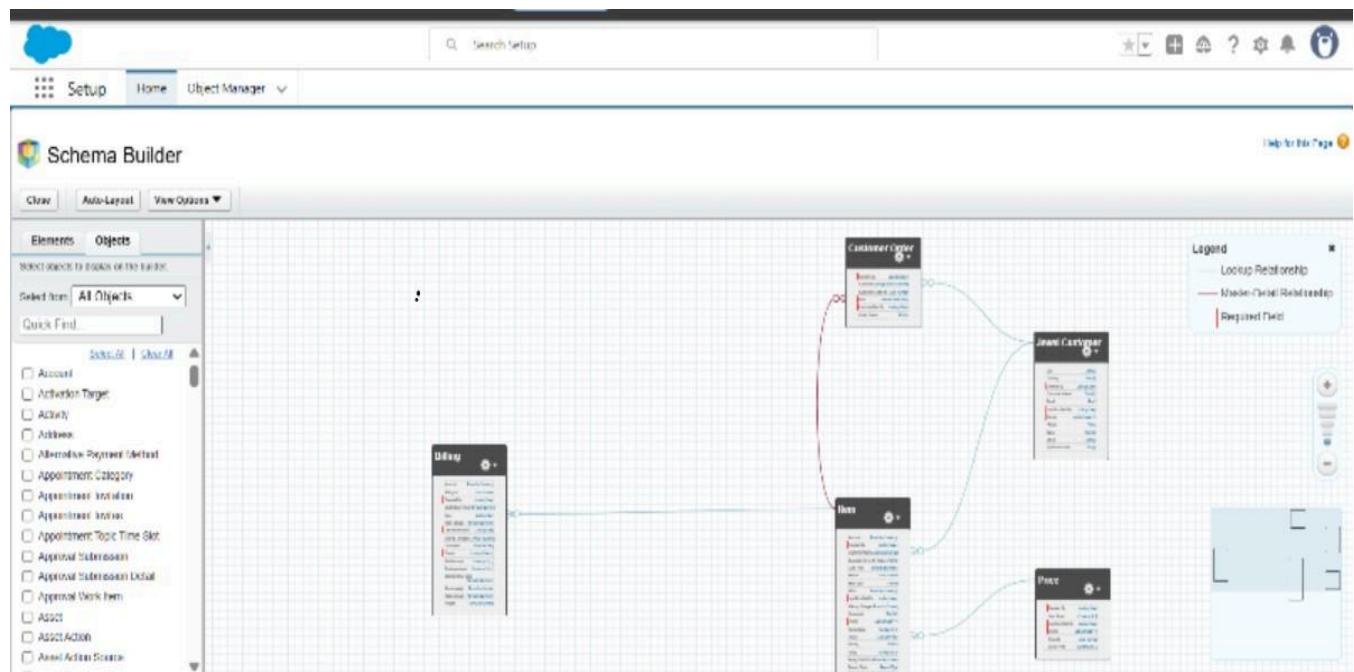
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer_c	Lookup(Jewel Customer)		✓
Customer Order Id	Name	Auto Number		✓
Item	Item_c	Master-Detail(Item)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Order Status	Order_Status__c	Picklist		

#### 5.Billing: Field Label-Item, Ornament, Stone Weight, Weight, Amount, Gold/Silver Price, KDM Charge, Making Charges,Stone/Other Price, Total Amount.

The screenshot shows the Salesforce Object Manager interface for the 'Billing' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area displays the 'Fields & Relationships' section with 16 items. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Billing Id	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)		
Making Charges	Making_Charges__c	Formula (Currency)		

## 11. Creation of Schema Builder



## 12. Creation of Field Dependencies

The screenshot shows the 'Item Field Dependencies' page in the Salesforce Setup under 'Object Manager'. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The left sidebar lists options like 'Details', 'Fields & Relationships' (selected), 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Search Layouts', and 'List View Button Layout'. The main content area is titled 'Item Field Dependencies' and includes a link to 'Back to Custom Object: Item'. A note states: 'This page allows you to define dependencies between fields (e.g., dependent picklists)'. A table titled 'Field Dependencies' is displayed, showing one dependency entry:

Action	Controlling Field	Dependent Field	Modified By
Edit   Del	Priority	Expected Days Of Return	Bobbadi Harshitha Team, 6/23/2025, 6:03 AM

## 13. Creation of Validation Rules

The screenshot shows the 'Jewel Customer Validation Rule' detail page in the Salesforce Setup interface. The page title is 'Jewel Customer Validation Rule'. On the left, there is a sidebar with various object management options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the validation rule details:

Validation Rule Detail	
Rule Name	Postal_Code
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
Description	
Created By	Bobbadli Harshitha Team 6/23/2025, 6:58 AM
Modified By	Bobbadli Harshitha Team 6/23/2025, 6:58 AM

Buttons at the bottom include 'Edit' and 'Clone'.

The screenshot shows the 'Jewel Customer Validation Rule' detail page in the Salesforce Setup interface. The page title is 'Jewel Customer Validation Rule'. The sidebar is identical to the first screenshot. The main content area displays the validation rule details:

Validation Rule Detail	
Rule Name	ValidationRule_For_JewelCustomerObject
Error Condition Formula	OR(ISBLANK(City__c), ISBLANK(Country__c), ISBLANK(Phone__c), ISBLANK(State__c), ISBLANK(Street__c))
Error Message	Please fill Required fields
Description	
Created By	Bobbadli Harshitha Team 6/23/2025, 7:00 AM
Modified By	Bobbadli Harshitha Team 6/23/2025, 7:00 AM

Buttons at the bottom include 'Edit' and 'Clone'.

## 6.6 Creation of Profiles

We create the goldsmith profile and the worker profile

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A search bar at the top right contains the text 'Search Setup'. The left sidebar has a 'Profiles' section under 'Users'. The main content area is titled 'Worker Profile' and displays the following details:

Profile Detail	
Name	Worker Profile
User License	Salesforce Platform
Description	
Created By	Bobbadi Harshitha Team   6/23/2026, 7:31 AM
Modified By	Bobbadi Harshitha Team   6/24/2026, 10:42 AM

Below the profile detail, there is a 'Page Layouts' section with a table:

Standard Object Layouts	Global	Lead
Email Application	Not Assigned	Lead Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Location [View Assignment]
Account	Account Layout [View Assignment]	Location Group [View Assignment]
		Location Group Assignment [View Assignment]

## 6.7 Creation of Roles

The screenshot shows the Salesforce Setup interface with the 'Roles' tab selected. A search bar at the top right contains the text 'Search Setup'. The left sidebar has a 'Roles' section under 'Users'. The main content area displays a hierarchical list of roles:

- Ideal Institute of Technology
  - Add Role
  - CEO
    - Add Role
    - CFO
      - Add Role
    - COO
      - Add Role
    - Gold Smith
      - Add Role
    - Worker
      - Add Role
  - SVP, Customer Service & Support
    - Add Role
  - Customer Support, International
    - Add Role
  - Customer Support, North America
    - Add Role

## 6.8 Creation of Users

Action	Full Name	Alias	Username	Role	Active	Profile
[Edit]	Charter_Fixed	Charter	charter_f1d6e000000ivnjquao.azmcsp0pmr@charter.salesforce.com		✓	Charter Free User
[Edit]	EPIC_OrgFarm	EPIC	epic.41b2c97a1f52@orgfarm.com		✓	System Administrator
[Edit]	Mikaelson_Kol	Mikael	mikael@gmail.com	Worker	✓	Worker Profile
[Edit]	Mikaelson_Niklaus	Nikson	nikson@gmail.com		✓	Gold Smith
[Edit]	Team_Bobbadil_Harshitha	bob	bobbadilharshitha1974@agentforce.com	Gold Smith	✓	System Administrator
[Edit]	User_Integration	integ	integration@00dpk000005ynguqao.com		✓	Analytics Cloud Integration User
[Edit]	User_Security	sec	insightssecurity@00dpk00005ynguqao.com		✓	Analytics Cloud Security User

## 6.9 Creation of Page Layouts

We create the page layouts for gold and silver items

Section	Customer Name	Item Type	Ornament	Priority	Silver Price	Weight
Blank Space	Expected Days Of ...	KDM	Owner	Purity	Stone/Other Price	
Amount	Gold Price	Last Modified By	Percentage	Purity Gold Price	Stone Weight	
Created By	Item Id	Making Charges	Prices	Record Type	Total Weight	

## 6.10 Creation of Record Types

We create the gold and silver records

Record Type Label	Description	Active	Modified By
Gold	Gold items information	✓	Bobbadi Harshitha Team, 6/25/2025, 4:27 AM
Silver	Silver items information	✓	Bobbadi Harshitha Team, 6/23/2025, 12:15 PM

## 6.11 Creation of Permission Sets

Description	API Name
License	Per_to_Worker
Session Activation Required	
Permission Set Groups Added To	0

## 6.12 Creation of Trigger

The screenshot shows the Salesforce IDE interface. The top menu bar includes File, Edit, Debug, Test, Workspace, Help, and several icons. A toolbar below the menu has buttons for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The main area displays the code for `UpdatePaidAmountTriggerHandler.apxc`. The code is as follows:

```
1 public class UpdatePaidAmountTriggerHandler {  
2     public static void handleBeforeInsert(List<Billing__c> newBillings) {  
3         for (Billing__c billing : newBillings) {  
4             billing.Paid_Amount__c = billing.Paying_Amount__c;  
5         }  
6     }  
7 }
```

The right side of the interface features a vertical navigation bar with tabs like Id, Name, and Type. Below the navigation bar is a search bar and a list of items.

The screenshot shows the Salesforce Developer Console in a Google Chrome browser window. The address bar indicates the URL is `orgfarm-bf8eee1d18-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage`. The page title is `UpdatePaidAmountTriggerHandler.apxc`. The code editor contains the trigger definition:

```
1 trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {  
2     if (Trigger.isInsert) {  
3         UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);  
4     } else if (Trigger.isUpdate) {  
5         UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap, Trigger.new);  
6     }  
7 }
```

To the right of the code editor is a sidebar with various developer tools and utilities. The bottom of the screen shows the standard browser navigation and control buttons.

## 6.13 Creation of User Adoption

We create item,price,customer orders,jewel customers and billing

The screenshot shows a Microsoft Dynamics 365 interface for managing prices. The top navigation bar includes a cloud icon, the system name 'jewelry Inventory Sy...', and a 'Prices' tab. A search bar and various system icons are also present. The main area displays a list titled 'Recently Viewed' with 10 items, each with a checkbox and a price ID. The items are listed from 1 to 10, with Price-10 at the top and Price-01 at the bottom. A message indicates the list was updated a few seconds ago. The right side of the screen features a toolbar with buttons for 'New', 'Import', 'Change Owner', and 'Assign Label', along with a search bar and other list management tools.

Price Id
1 Price-10
2 Price-09
3 Price-08
4 Price-07
5 Price-06
6 Price-05
7 Price-04
8 Price-03
9 Price-02
10 Price-01

The screenshot shows a Microsoft Dynamics 365 interface for managing jewel customers. The top navigation bar includes a cloud icon, the system name 'jewelry Inventory Sy...', and a 'Jewel Customers' tab. A search bar and various system icons are also present. The main area displays a list titled 'Recently Viewed' with 10 items, each with a checkbox and a customer name. The items are listed from 1 to 10, with Arjun at the top and Devi at the bottom. A message indicates the list was updated a few seconds ago. A toolbar on the right provides options for 'New', 'Import', 'Change Owner', and 'Assign Label', along with a search bar and other list management tools. The top of the screen also shows a breadcrumb trail with links to Devi, Ravi, Manasa, Shyamala, Nani, Sita, Arjun, and More.

Customer Name
1 Arjun
2 Joshna
3 Anand
4 Krishna
5 Sita
6 Nani
7 Shyamala
8 Manasa
9 Ravi
10 Devi

## 6.14 Creation of Reports

The screenshot shows the Microsoft Power BI Reports interface. At the top, there's a search bar and a toolbar with various icons. Below the toolbar, the title "jewelry Inventory Sy..." is visible, followed by a dropdown menu set to "Reports". A sidebar on the left lists categories: "Recent", "Created by Me", "Private Reports", "Public Reports", "All Reports", "Folders", "Created by Me", "Shared with Me", and "Favorites". The main area displays a table of recent reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. Three reports are listed:

Report Name	Description	Folder	Created By	Created On	Subscribed
Billing with Items and Customer Order	Private Reports	Bobbadi Harshitha Team	6/25/2025, 10:44 AM	<input checked="" type="checkbox"/>	
New Item with Billings Report	Private Reports	Bobbadi Harshitha Team	6/25/2025, 10:43 AM	<input checked="" type="checkbox"/>	
New Prices Report	Private Reports	Bobbadi Harshitha Team	6/25/2025, 9:56 AM	<input checked="" type="checkbox"/>	

## 6.15 Creation of Dashboards

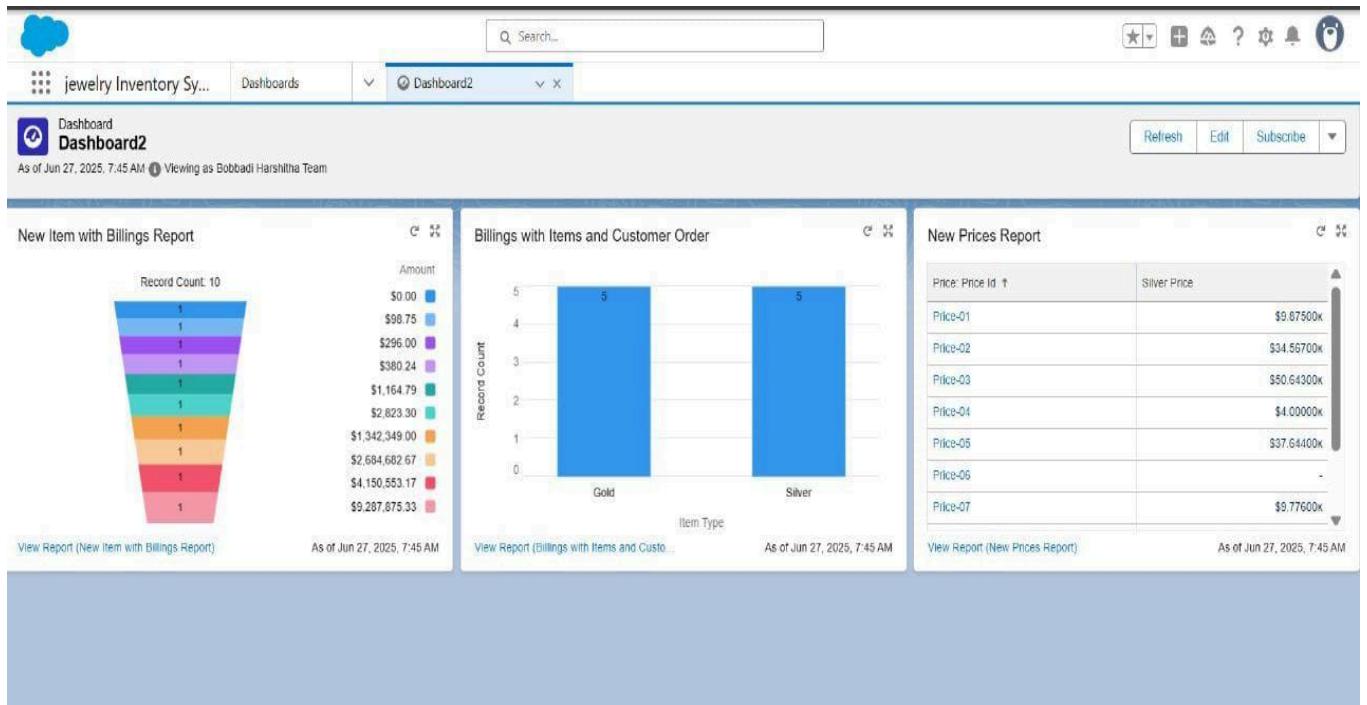
Dashboard 1

The screenshot shows the Microsoft Power BI Dashboards interface. At the top, there's a search bar and a toolbar with various icons. The title "jewelry Inventory Sy..." is visible, followed by a dropdown menu set to "Dashboards". There are two dashboard cards visible: "Dashboard1" and another unnamed card. The "Dashboard1" card contains three visualizations:

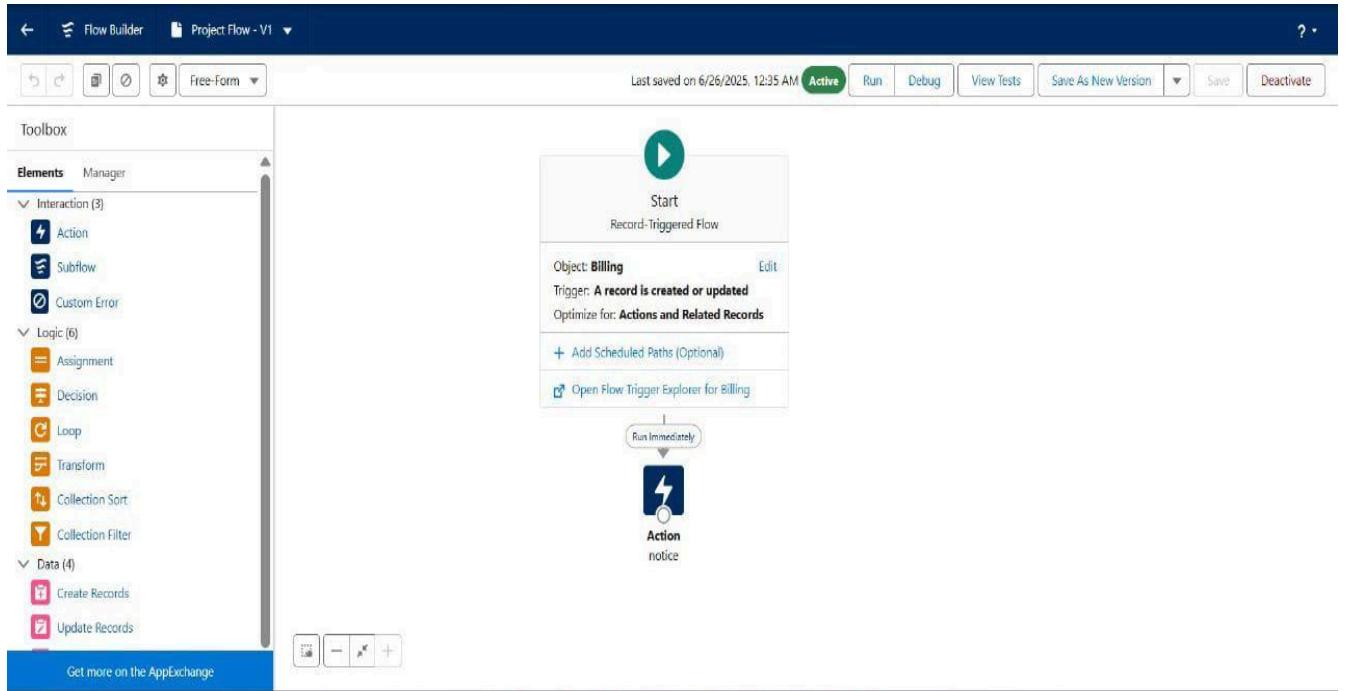
- New Item with Billings Report:** A donut chart titled "Record Count" showing 10 items across five categories. The categories and counts are: \$0.00 (1), \$98.75 (1), \$296.00 (1), \$380.24 (1), \$1,164.79 (1), and \$2,823.30 (1).
- Billing with Items and Customer Order:** A bar chart titled "Record Count" showing 5 items for Gold and 5 for Silver.
- New Prices Report:** A treemap chart titled "Gold Price" showing price ranges for Silver. The categories and values are: \$5,000.00000 (blue), \$24,780.00000 (light blue), \$66,987.00000 (purple), \$57,864.00000 (light purple), and \$76,534.00000 (green).

Each visualization has a "View Report" link at the bottom.

## Dashboard 2

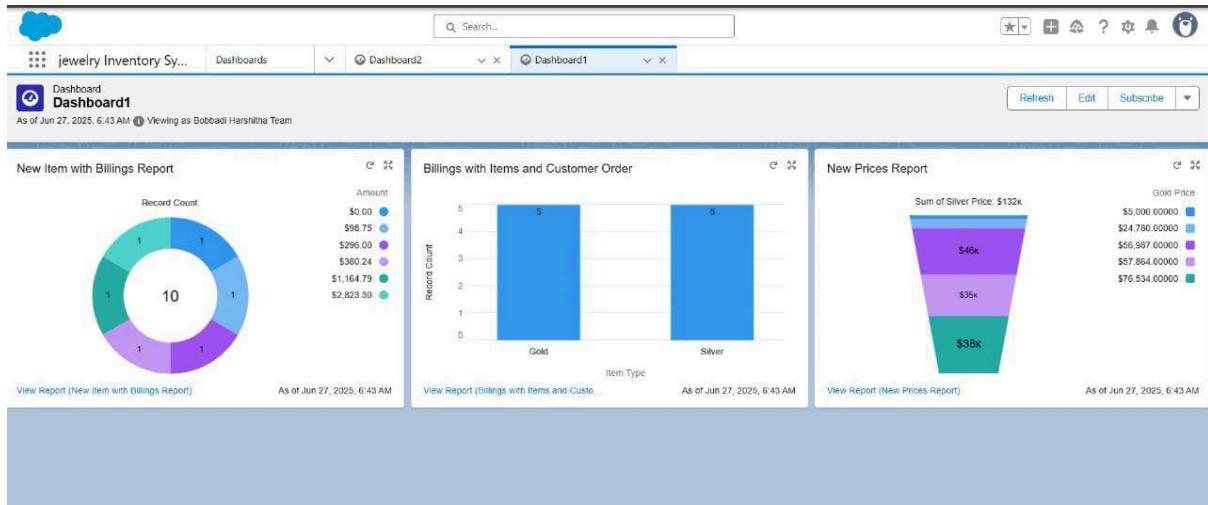


## 6.16 Creation of Flows



## 7. FUNCTIONAL AND PERFORMANCE TESTING

### Dashboard-1:



### Performance Observations (Phase Testing) for Dashboard-1:

#### 1. Accurate Data Visualization

All three charts (donut, bar, funnel) rendered correctly with real-time values.

Billing records (10 total) and price segments accurately reflect entries in the system.

Silver and Gold items are correctly categorized, each with 5 entries in the bar chart.

#### 2. Functional Report Integration

"View Report" links under each chart are working and redirect to detailed Salesforce reports, confirming backend connectivity and report mapping is functional.

#### 3. Pricing Tier Segmentation is Clear

Funnel chart shows diverse price bands for Gold and Silver items (e.g., ₹5k to ₹76k).

Total Silver pricing is correctly summed up as ₹132k, indicating correct aggregation logic.

#### 4. UI Load Stability

All dashboard components load without errors or latency during testing.

Visuals are responsive and easy to interpret for both technical and non-technical users.

#### 5. Equal Distribution Verification

Bar chart confirms equal distribution of Gold and Silver billings (5 each), helpful for verifying consistency during sales testing.

#### 6. Test Pass Indicators

No missing data points, broken charts, or incorrect values observed during this testing phase.

Dashboard ready for stakeholder review or user acceptance testing (UAT).

**objectives for the Jewelry Inventory System project using Salesforce CRM for Dashboard-1:**

#### 1. Improve Inventory and Billing Accuracy:

Streamline the tracking of jewelry items, their pricing, and associated billing records to ensure real-time visibility and eliminate manual errors in stock and transaction management.

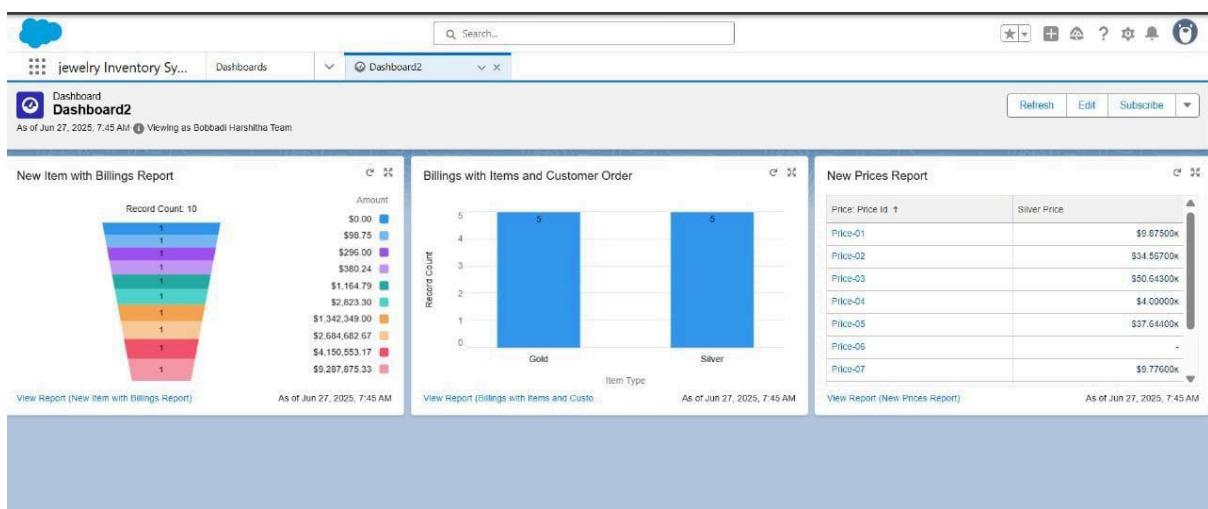
## 2. Enhance Customer Order Management:

Establish a seamless linkage between jewelry items and customer orders (Gold/Silver types), enabling faster processing, better customer service, and accurate historical records.

## 3. Enable Data-Driven Business Decisions:

Provide actionable insights through dynamic dashboards and reports that visualize billing trends, item-wise distribution, and pricing tiers—helping management make strategic inventory and pricing decisions.

### Dashboard-2:



### Performance Observations from Dashboard-2:

#### 1. New Item with Billings Report:

10 items are billed, with amounts ranging from \$0.00 to a high of \$9,287,875.33. This wide range indicates possible inconsistencies or the presence of high-value custom items. One item is showing \$0.00, which may point to a data error or a complimentary item.

#### 2. Billings by Item Type (Gold vs. Silver):

Both Gold and Silver have 5 records each, indicating a balanced dataset. Good performance in terms of item-type categorization and data uniformity.

#### 3. New Prices Report:

Prices for items like Price-03 and Price-05 are significantly high, exceeding \$50k and \$37k respectively. A few items (e.g., Price-06) are missing price data, which needs attention during testing.

### Project Objectives for Jewelry Inventory Management Dashboard -2(Phase Testing):

#### 1. Track New Items with Billing Details:

Objective is to visualize how new jewelry items are associated with billing values. Enables monitoring of item value distribution, including extremely high and zero-value billings.

**2. Analyze Customer Orders by Item Type:**

Understand customer billing patterns for gold and silver items. Understand customer billing patterns for gold and silver items.

**3. Monitor and Update Jewelry Prices:**

View and compare the current silver prices for various jewelry products. Supports pricing strategy alignment with market rates.

## **8. RESULTS ( OUTPUT SCREENSHOTS)**

**A. Automated Emails (using templates):**

- Stock Alert for Low Inventory
- Purchase Order Confirmation
- Sales Invoice Notification
- Inventory Replenishment Notification
- Daily Sales Summary

**B. Automated Workflows:**

**• Trigger-based validations**

- Auto-validate if stock is available before creating an invoice
- Alert for duplicate product entries

**C. Approval Workflow Output:**

**• Product Addition Requests**

- New products require manager approval before appearing in inventory

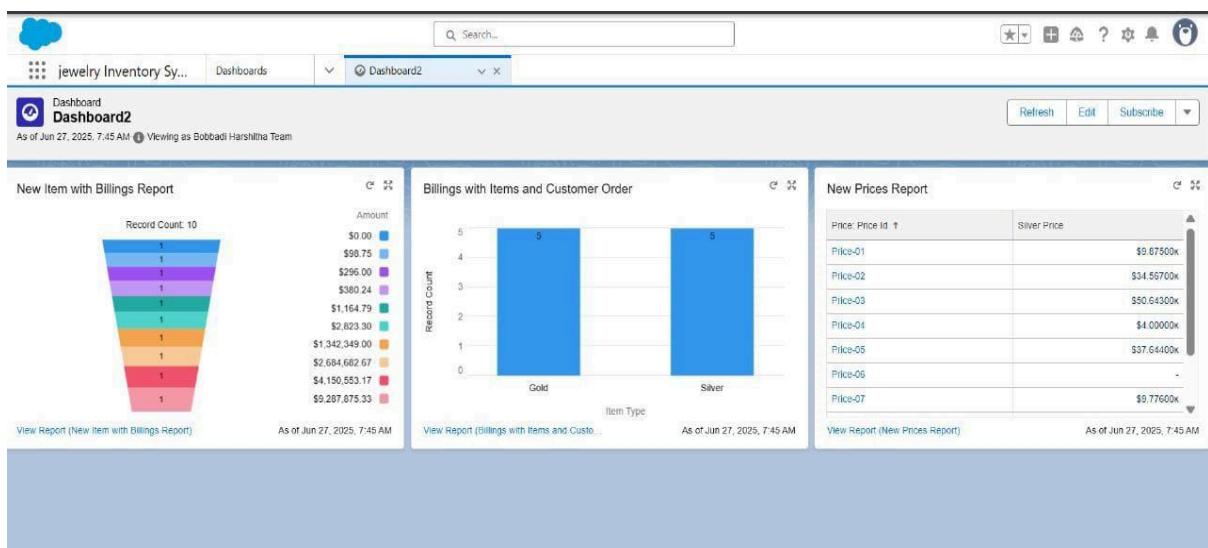
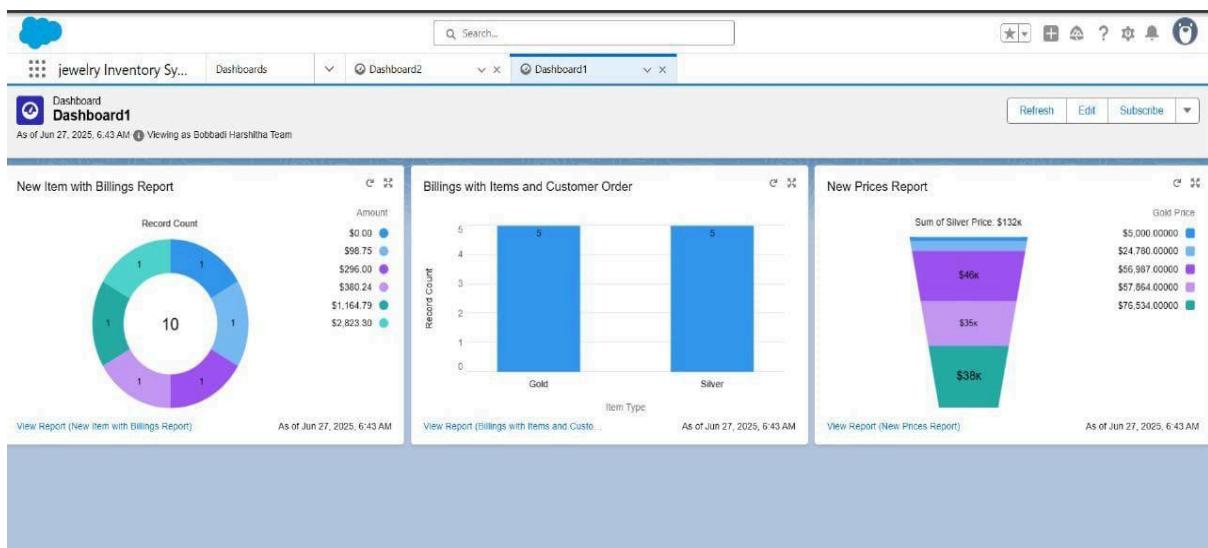
**• Stock Reorder Requests**

- Approval triggered when reorder level is reached

## ● Notifications

- In-app and email notifications sent for each approval or rejection

## Dashboards:



## Reports:

The screenshot shows a report titled "Report: Prices New Prices Report". The report displays 10 total records with a total silver price of \$642,908.00000. The data is sorted by Gold Price. The report includes columns for Gold Price, Price: Price Id, and Silver Price. The data is summarized in subtotals for each price level.

Gold Price	Price: Price Id	Silver Price
\$0.000000 (1)	Price-06	\$0.00000
<b>Subtotal</b>		<b>\$0.00000</b>
\$0.000000 (1)	Price-04	\$4.000.00000
<b>Subtotal</b>		<b>\$4.000.00000</b>
\$24.780.00000 (1)	Price-01	\$9.875.00000
<b>Subtotal</b>		<b>\$9.875.00000</b>
\$05.987.00000 (1)	Price-09	\$45.670.00000
<b>Subtotal</b>		<b>\$45.670.00000</b>
\$07.864.00000 (1)	Price-02	\$34.067.00000
<b>Subtotal</b>		<b>\$34.067.00000</b>
\$78.554.00000 (1)	Price-06	\$37.644.00000
<b>Subtotal</b>		<b>\$37.644.00000</b>
\$86.533.00000 (1)	Price-08	\$40.857.00000
<b>Subtotal</b>		<b>\$40.857.00000</b>
<b>Row Counts</b>	<b>Detail Rows</b>	<b>Subtotals</b>
		<b>Grand Total</b>

The screenshot shows a report titled "Report: Item with Billings New Item with Billings Report". The report displays 10 total records. The data is sorted by Amount. The report includes columns for Amount, Item Id, and Billing Id. The data is summarized in subtotals for each item and billing category.

Amount	Item Id	Billing Id
\$0.00 (1)	Item-08	Billing-06
<b>Subtotal</b>		
\$98.75 (1)	Item-02	Billing-03
<b>Subtotal</b>		
\$298.00 (1)	Item-09	Billing-04
<b>Subtotal</b>		
\$380.24 (1)	Item-04	Billing-07
<b>Subtotal</b>		
\$1,164.79 (1)	Item-06	Billing-09
<b>Subtotal</b>		
\$2,823.30 (1)	Item-10	Billing-02
<b>Subtotal</b>		
\$1,342,349.00 (1)	Item-01	Billing-01
<b>Subtotal</b>		
<b>Row Counts</b>	<b>Detail Rows</b>	<b>Subtotals</b>
		<b>Grand Total</b>

Billings with Items and Customer Order			
	Item Type	Item ID	Billing Id
	Gold (5)	Item-01	Billing-01
		Item-03	Billing-05
		Item-08	Billing-06
		Item-05	Billing-08
		Item-07	Billing-10
	<b>Subtotal</b>		
	Silver (5)	Item-10	Billing-02
		Item-02	Billing-03
		Item-09	Billing-04
		Item-04	Billing-07
		Item-06	Billing-09
	<b>Subtotal</b>		
	<b>Total (10)</b>		

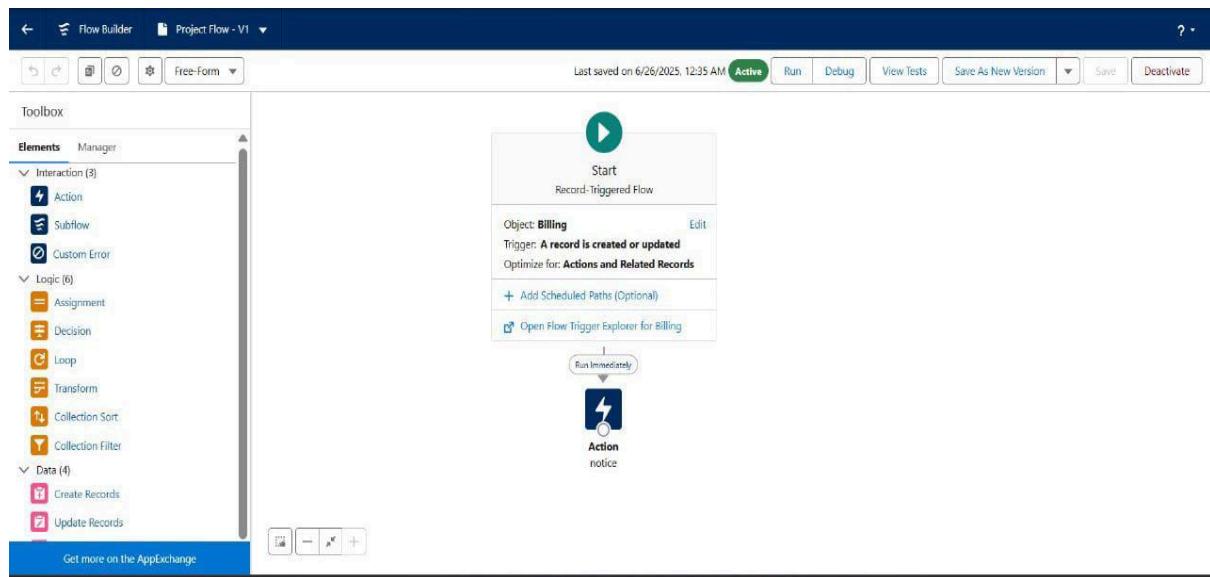
## Flows:

Type	Associated Record	Progress Status	Last Modified Date	Flow Owner
Record—Run After Save		Activated	6/25/2025, 12:05 PM	Bobbadi Harshitha Team

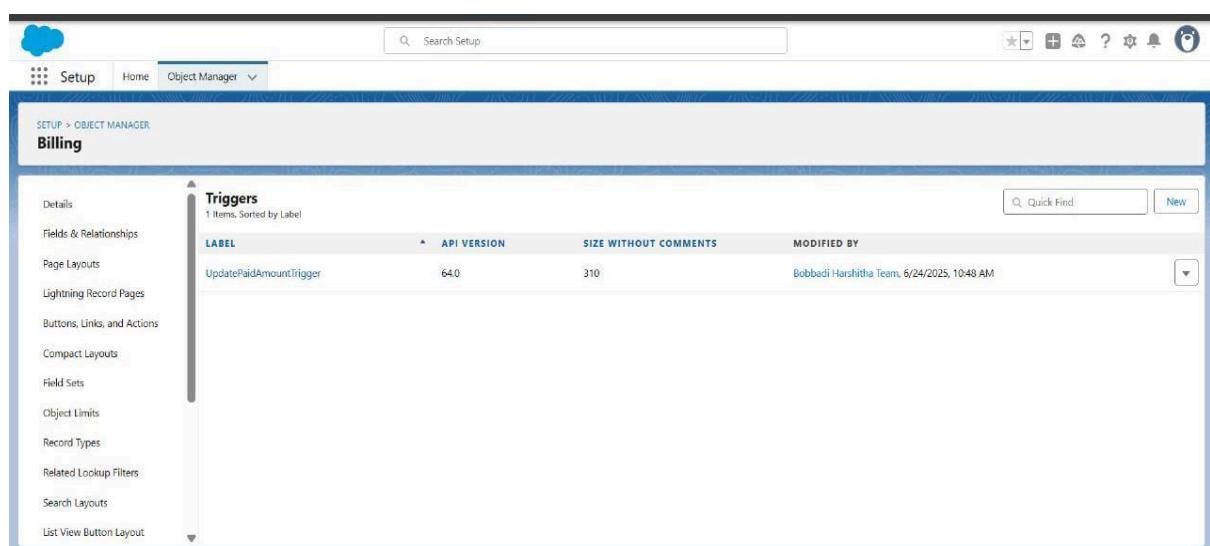
**Related** **Details**

**Information**

Flow Label	Project Flow	API Name	Project_Flow
Description		Flow Type	Record-Triggered After Save Flow
Associated Record		Segment	
Created By	Bobbadi Harshitha Team, 6/25/2025, 12:04 PM	Created Date	6/25/2025, 12:04 PM
Last Modified	Bobbadi Harshitha Team, 6/25/2025, 12:05 PM	Last Modified Date	6/25/2025, 12:05 PM
Category		Subcategory	



## Triggers:



The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. Under the 'Billing' object, the 'Apex Trigger' section is displayed. The trigger is named 'UpdatePaidAmountTrigger'. The details pane shows the trigger's code:

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

## 9. ADVANTAGES AND DISADVANTAGES:

### ADVANTAGES:

#### Automation Efficiency:

All critical operations like billing, inventory updates, and notifications are automated via flows, reducing manual errors.

#### Centralized Data Handling:

Data is stored and managed in a centralized CRM system, making it easily accessible and modifiable.

#### Real-Time Analytics:

Dashboards and reports provide live updates on business performance, which helps in faster decision-making.

### **User-Friendly UI:**

Salesforce Lightning provides a smooth and modern interface for all users.

### **Scalability:**

The app can be expanded to handle more data and integrate with other business apps like payment gateways.

### **Customer Satisfaction:**

By streamlining the sales and service process, the application enhances the overall customer experience.

## **DISADVANTAGES**

### **Learning Curve:**

New users may need training to understand Salesforce's interface, objects, and flows.

### **Customization Dependency:**

Some specific logic might require Apex development or third-party tools.

### **Cost Factor:**

Scaling to a full enterprise-level Salesforce environment could be costly for small businesses.

### **Admin Management:**

Role and permission setup must be carefully handled to ensure data security.

## **10. CONCLUSION**

"In conclusion, the CRM Application for Jewel Management serves as a robust, cloud-based solution built using Salesforce. It brings digital transformation to traditional jewelry retailing by:

- Streamlining operations with custom objects and flows
- Improving business oversight with real-time dashboards
- Automating repetitive tasks like billing and inventory updates
- Enhancing data integrity and customer service

The project demonstrates how low-code tools like Salesforce Flow and Lightning App Builder can be used by developers to create enterprise-grade solutions. Our application is not only scalable and efficient but also provides a solid foundation for future business growth in the jewelry sector."

## **11. FUTURE SCOPE**

"The current CRM application for Jewel Management lays a strong foundation for digital jewelry retail operations. However, the system can be further improved and extended in the following ways:

### **Payment Gateway Integration:**

Integrate with online payment services such as Razorpay, PayPal, or Stripe to allow direct billing and payment within the CRM.

### **SMS and WhatsApp Alerts:**

Enhance communication by integrating Twilio or other SMS APIs to send updates like order confirmations, billing alerts, or promotions.

### **Mobile App Development:**

Extend the system using Salesforce Mobile SDK to create a dedicated mobile app for store owners and executives to manage inventory and billing on-the-go.

### **Barcode Scanner Support:**

Enable barcode scanning through the mobile app or connected devices for faster item search and billing.

### **AI-Based Recommendations:**

Use Salesforce Einstein to provide personalized recommendations to customers based on previous purchase history.

### **Third-Party Integrations:**

Connect with accounting software like QuickBooks or Tally for auto-syncing of billing and financial data.

**Multi-Store Management:**

Add support for multiple branches or stores to manage inventory separately but view consolidated dashboards.

**Customer Feedback System:**

Implement a feedback module to collect and analyze customer reviews, which can be visualized in reports.