

# **CRM APPLICATION FOR JEWEL MANAGEMENT - (Developer)**

**College Name: Sri Vasavi College (SFW)**

**College Code: BRU17**

**TEAM ID:**

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## **Project Description:**

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

## **As a team We've learned,**

- Real Time Salesforce Project
- Data Modelling
- Creating an Application
- User Interface Customization
- Object & Relationship in Salesforce
- Formula fields and Validation rules.
- Field Dependencies
- Record Types
- Cross object formula fields.
- Conditional formatting.
- Flows
- Email alerts and email templates
- Reports & Dashboards

## **Purpose**

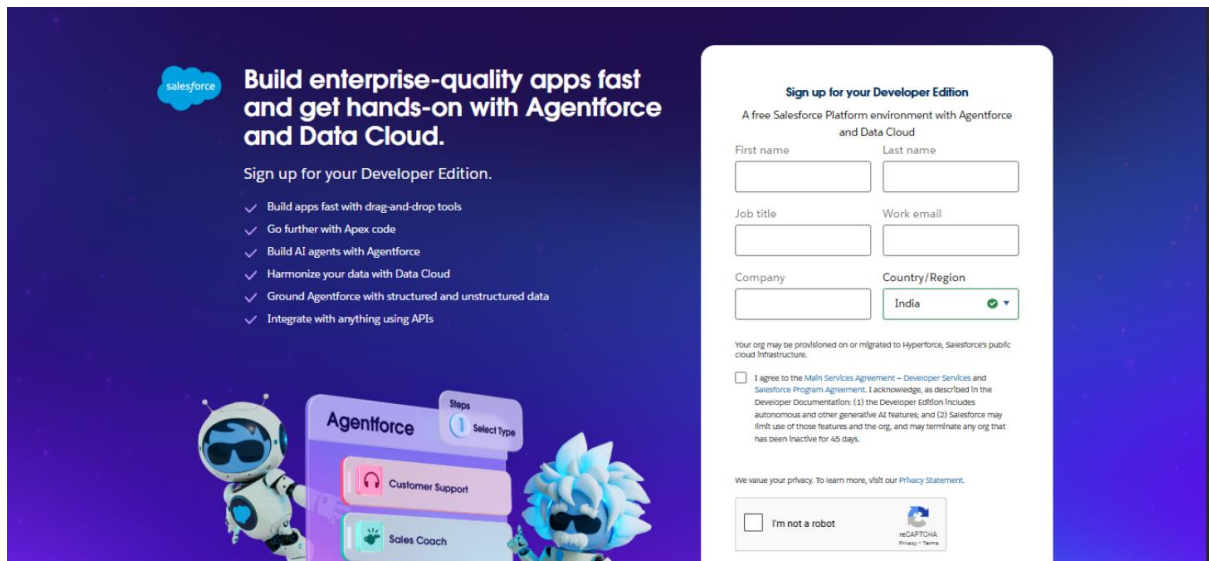
A CRM application's purpose for jewel management is to organize customer data, streamline sales and marketing efforts, personalize customer experiences, and improve overall customer retention and loyalty. It helps to track purchase history and preferences, manage special occasions like birthdays and anniversaries, automate marketing tasks, nurture leads, and gain insights into sales performance to boost revenue and foster stronger customer relationships.

# DEVELOPMENT PHASE

## ▪ Salesforce

### Creating Developer Account:

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



The image shows the Salesforce Developer Edition signup page. On the left, there's a promotional banner for Agentforce and Data Cloud with a list of benefits. On the right, there's a form titled 'Sign up for your Developer Edition' with fields for First name, Last name, Job title, Work email, Company, and Country/Region (set to India). Below the form, there's a checkbox for agreeing to the terms and a reCAPTCHA 'I'm not a robot' checkbox.

**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

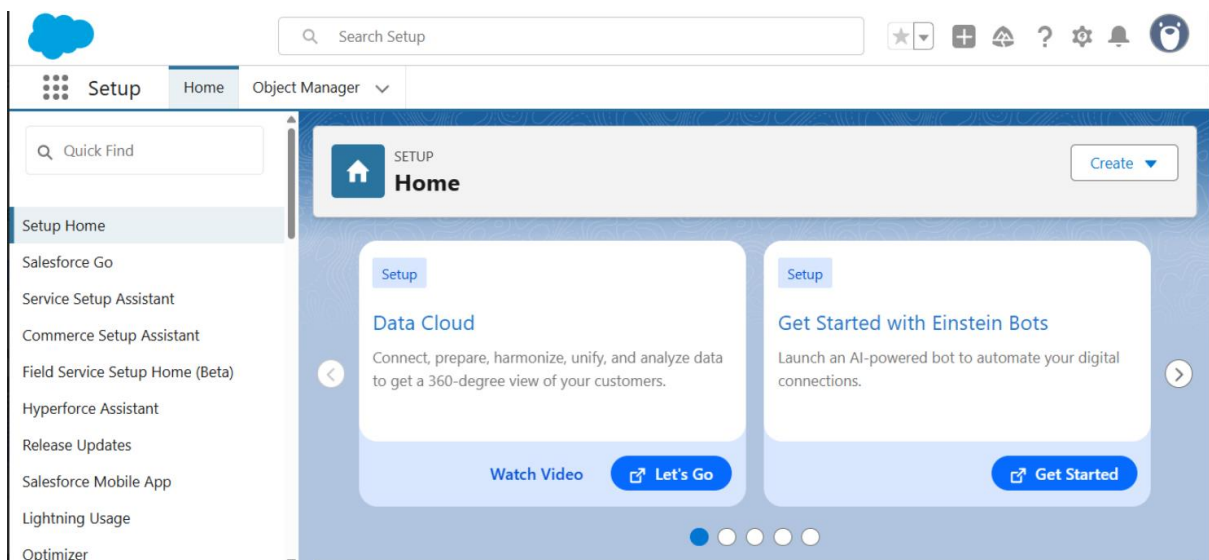
Company  Country/Region

☐ 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 

### Account Activation



## ▪ Object

### Create Jewel Customer Object

The screenshot shows the Salesforce Setup interface for the 'Jewel Customer' object. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The left sidebar contains a menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The main content area is titled 'Jewel Customer' and contains a 'Details' section with the following fields:

Field	Value
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

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

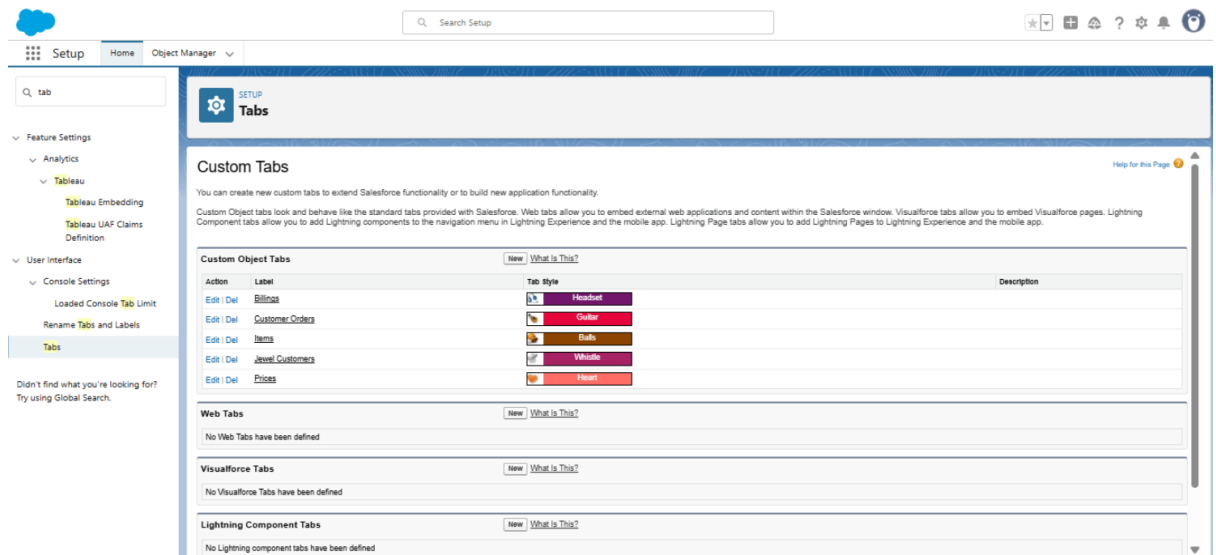
### Create Item Object

The screenshot shows the Salesforce Setup interface for the 'Item' object. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The left sidebar contains a menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The main content area is titled 'Item' and contains a 'Details' section with the following fields:

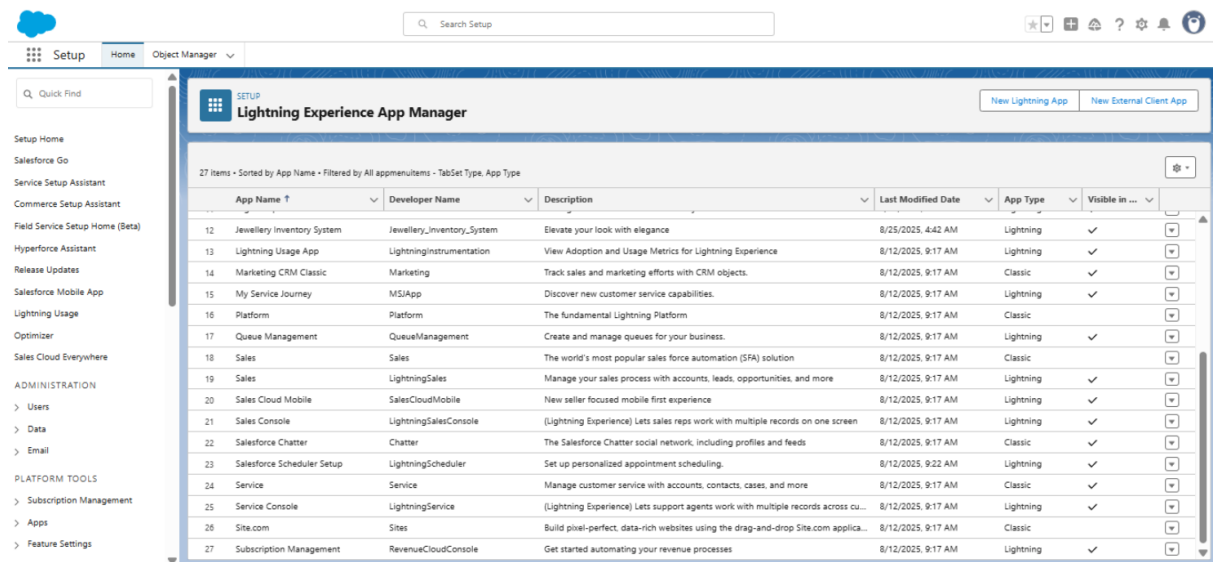
Field	Value
Description	
API Name	Item__c
Custom	✓
Singular Label	Item
Plural Label	Items
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

- **Tabs**  
**Creating a Custom Tab For (Jewel Customer. Item, Customer Order, Price ,Billing Objects)**



- **The Lightning App**  
**Create a Lightning App**



# Fields

Setup

Home

Object Manager

Search Setup

Star

Grid

Refresh

Help

Settings

Notifications

User

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

Fields & Relationships

11 Items. Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Country	Country__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User:Group)		✓
Phone	Phone__c	Phone		
State	State__c	Text(20)		
Street	Street__c	Text(20)		
Zip/Postal code	Zip_Postal_code__c	Text(8)		

Setup

Home

Object Manager

Search Setup

Star

Grid

Refresh

Help

Settings

Notifications

User

SETUP > OBJECT MANAGER

Customer Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Fields & Relationships

6 Items. Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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

Setup

Home

Object Manager

Search Setup

Star

Grid

Refresh

Help

Settings

Notifications

User

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

Fields & Relationships

23 Items. Sorted by Field Label

Quick Find


New

Deleted Fields







Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Customer	Customer__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)		
Last Modified By	LastModifiedById	Lookup(User)		
Making Charges	Making_Charges__c	Formula (Currency)		
Ornament	Ornament__c	Text(20)		



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Price

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction RulesScoping RulesObject Access


Fields & Relationships

6 Items, Sorted by Field Label







Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Gold Price	Gold_Price__c	Currency(8, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)		✓
Price	Name	Auto Number		✓
Silver Price	Silver_Price__c	Currency(8, 5)		



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Billing

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction RulesScoping RulesObject Access

Fields & Relationships

16 Items, Sorted by Field Label

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Billing	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Gold/Silver Price	Stone_Other_Price__c	Formula (Currency)		
Item	Item__c	Lookup(Item)		✓
KDM Charge	KDM_Charge__c	Formula (Currency)		
Last Modified By	LastModifiedById	Lookup(User)		
Making Charges	Making_Charges__c	Formula (Currency)		
Ornament	Ornament__c	Formula (Text)		
Owner	OwnerId	Lookup(User.Group)		✓
Paid Amount	Paid_Amount__c	Currency(18, 0)		

▪ Profiles

Gold Smith Profile

Setup

Home

Object Manager

Quick Find

Setup Home

Salesforce Go

Service Setup Assistant

Commerce Setup Assistant

Field Service Setup Home (Beta)

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

Users

Data

Email

PLATFORM TOOLS

Subscription Management

Apps

Feature Settings

Search Setup

Star

Share

Help

Settings

Profile

SETUP

Profiles

Profile

Gold Smith

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges

Enabled Apex Class Access

Enabled Visualforce Page Access

Enabled External Data Source Access

Enabled Named Credential Access

Enabled External Credential Principal Access

Enabled Custom Metadata Type Access

Enabled Custom Settings Definitions Access

Enabled Flow Access

Enabled Service Presence Status Access

Enabled Custom Permissions

Profile Detail

Edit

Clone

Delete

View Users

Name	Gold Smith		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Princy Navera B	8/27/2025, 8:12 AM	Modified By Princy Navera B 8/27/2025, 7:48 AM

Page Layouts

Standard Object Layouts	
Global	Global Layout (View Assignment)
Email Application	Not Assigned (View Assignment)
Home Page Layout	Home Page Default (View Assignment)
Account	Account Layout (View Assignment)
Alternative Payment Method	Alternative Payment Method Layout (View Assignment)
Appointment Invitation	Appointment Invitation Layout (View Assignment)
Asset	Asset Layout (View Assignment)
Asset Action	Asset Action Layout
Location Group	Location Group Layout (View Assignment)
Location Group Assignment	Location Group Assignment Layout (View Assignment)
Macro	Macro Layout (View Assignment)
Object Milestone	Object Milestone Layout (View Assignment)
Operating Hours	Operating Hours Layout (View Assignment)
Opportunity	Opportunity Layout (View Assignment)
Opportunity Product	Opportunity Product Layout (View Assignment)
Order	Order Layout

Worker Profile

Setup

Home

Object Manager

Search Setup

Star

Share

Help

Settings

Profile

SETUP

Profiles

Profile

Worker

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges

Enabled Apex Class Access

Enabled Visualforce Page Access

Enabled External Data Source Access

Enabled Named Credential Access

Enabled External Credential Principal Access

Enabled Custom Metadata Type Access

Enabled Custom Settings Definitions Access

Enabled Flow Access

Enabled Service Presence Status Access

Enabled Custom Permissions

Profile Detail

Edit

Clone

Delete

View Users

Name	Worker		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Princy Navera B	8/27/2025, 8:57 AM	Modified By Princy Navera B 8/27/2025, 7:48 AM

Page Layouts

Standard Object Layouts	
Global	Global Layout (View Assignment)
Email Application	Not Assigned (View Assignment)
Home Page Layout	Home Page Default (View Assignment)
Account	Account Layout (View Assignment)
Alternative Payment Method	Alternative Payment Method Layout (View Assignment)
Appointment Invitation	Appointment Invitation Layout (View Assignment)
Asset	Asset Layout (View Assignment)
Asset Action	Asset Action Layout
Location Group	Location Group Layout (View Assignment)
Location Group Assignment	Location Group Assignment Layout (View Assignment)
Macro	Macro Layout (View Assignment)
Object Milestone	Object Milestone Layout (View Assignment)
Operating Hours	Operating Hours Layout (View Assignment)
Opportunity	Opportunity Layout (View Assignment)
Opportunity Product	Opportunity Product Layout (View Assignment)
Order	Order Layout

▪ Roles





The screenshot shows the 'User Edit' page for 'Niklaus Mikaelson' in the Salesforce Setup interface. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'User Edit' and includes a search bar and a 'Help for this Page' link. The 'General Information' section contains fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Role' section includes a dropdown for Role (Gold Smith), a dropdown for User License (Salesforce), a dropdown for Profile (Gold Smith), and a checkbox for Active. Other sections include Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type, Data.com Monthly Addition Limit, Accessibility Mode (Classic Only), High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, Debug Mode, and Send Apex Warning Emails.

## ▪ Page layouts

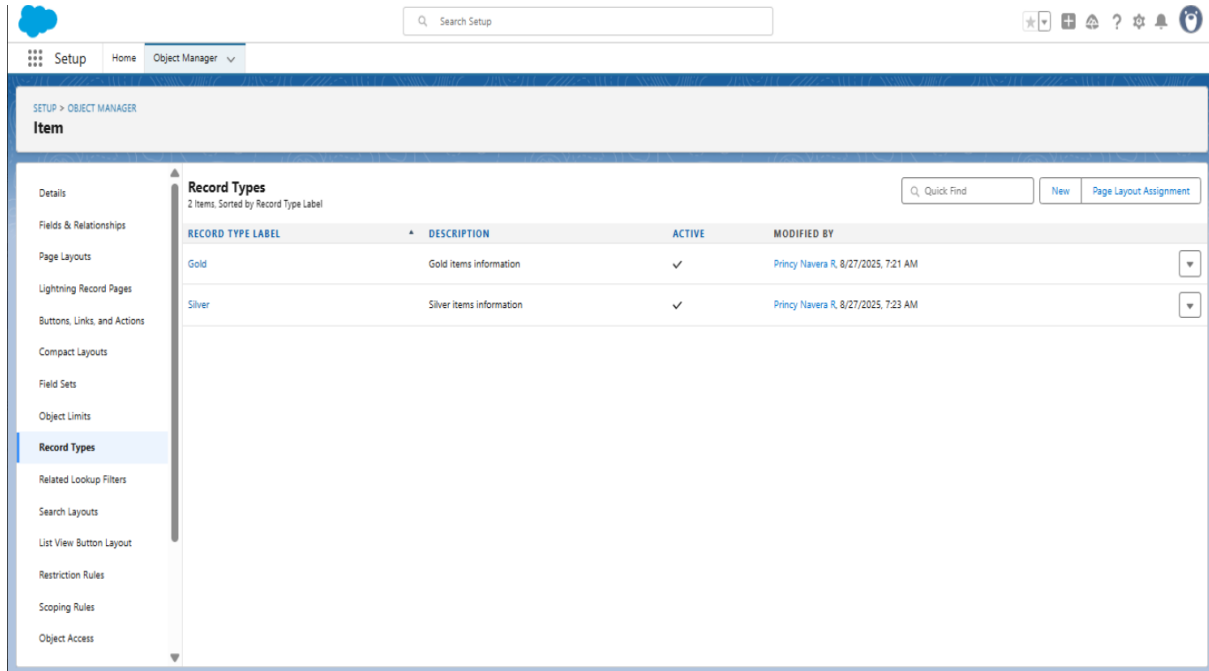
## To Create a Gold And Silver Page layout

The screenshot shows the 'Page Layouts' page in the Salesforce Setup interface. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Page Layouts' and includes a search bar and a 'New' button. The table below lists the existing page layouts.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Item Layout	Princy Navera R, 8/25/2025, 4:18 AM	Princy Navera R, 8/27/2025, 3:58 AM
Page Layout for Gold	Princy Navera R, 8/27/2025, 7:06 AM	Princy Navera R, 8/27/2025, 7:13 AM
Page Layout for Silver	Princy Navera R, 8/27/2025, 7:15 AM	Princy Navera R, 8/27/2025, 7:17 AM

## ▪ Record Types

### To create a Record Type

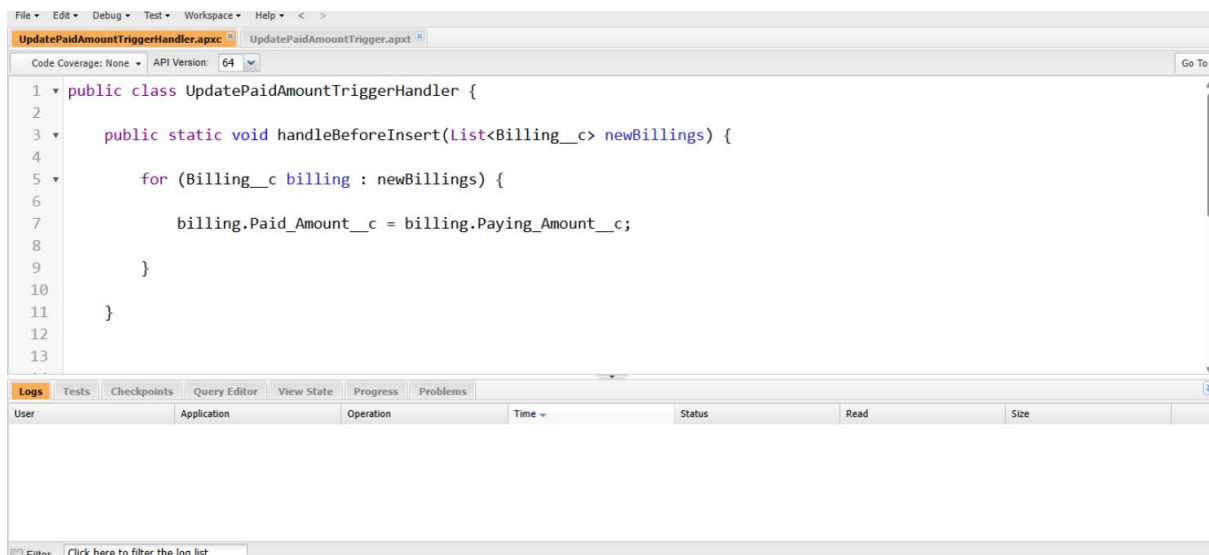


The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types (selected), Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, and Object Access. The main content area is titled 'Item' and shows 'Record Types' for the 'Item' object. It displays a table with 2 items, sorted by Record Type Label. The table has columns for Record Type Label, Description, Active status, and Modified By. The items are 'Gold' and 'Silver', both active, and modified by 'Princy Navera R' on 8/27/2025 at 7:21 AM and 7:23 AM respectively. There are 'Quick Find', 'New', and 'Page Layout Assignment' buttons at the top right of the table.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold Items information	✓	Princy Navera R, 8/27/2025, 7:21 AM
Silver	Silver Items information	✓	Princy Navera R, 8/27/2025, 7:23 AM

## ▪ Trigger

### Create a Trigger Handler class

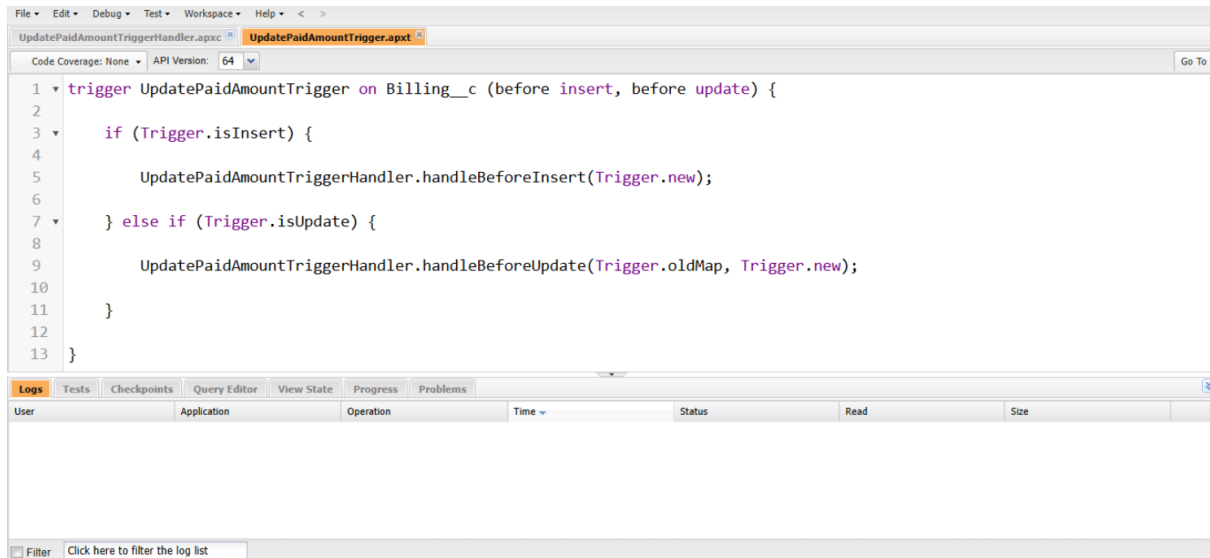


The screenshot shows the Salesforce IDE with the 'UpdatePaidAmountTriggerHandler.apxc' file open. The code is as follows:

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

The IDE interface includes a menu bar (File, Edit, Debug, Test, Workspace, Help), a toolbar with 'Code Coverage: None' and 'API Version: 64', and a 'Go To' button. The bottom panel shows tabs for 'Logs', 'Tests', 'Checkpoints', 'Query Editor', 'View State', 'Progress', and 'Problems'. The 'Logs' tab is active, displaying a table with columns: User, Application, Operation, Time, Status, Read, and Size. A 'Filter' button and a link 'Click here to filter the log list' are at the bottom left.

## Create the trigger



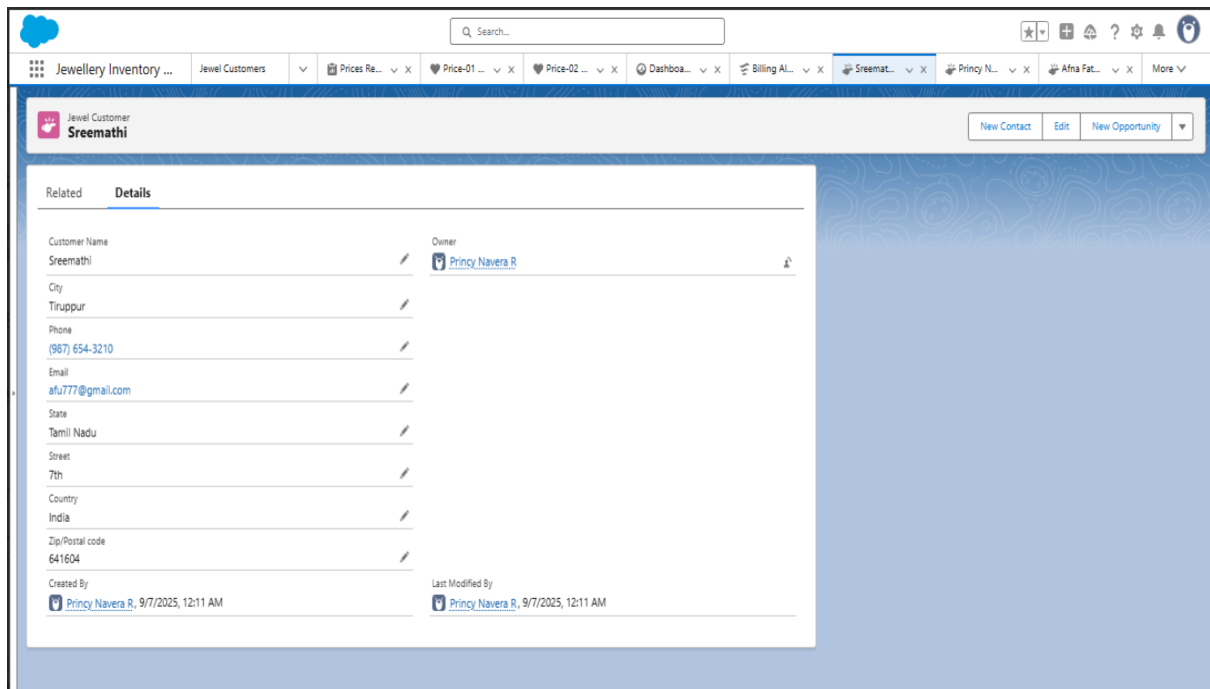
The screenshot shows an IDE with the following components:

- File Explorer:** Shows `UpdatePaidAmountTriggerHandler.apxc` and `UpdatePaidAmountTrigger.apxt`.
- Code Editor:** Contains the following Apex trigger code:

```
1 trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {  
2  
3     if (Trigger.isInsert) {  
4  
5         UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);  
6  
7     } else if (Trigger.isUpdate) {  
8  
9         UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap, Trigger.new);  
10  
11     }  
12  
13 }
```
- Logs Panel:** A table with columns: User, Application, Operation, Time, Status, Read, Size. It is currently empty.
- Filter:** A button labeled "Filter" and a text input "Click here to filter the log list".

## ▪ User Adoption

### Create a Record (Jewel Customer)



The screenshot shows a CRM interface for creating a Jewel Customer record. The interface includes a top navigation bar with a search bar and several tabs. The main content area displays the details of a customer named Sreemathi.

**Navigation Bar:**

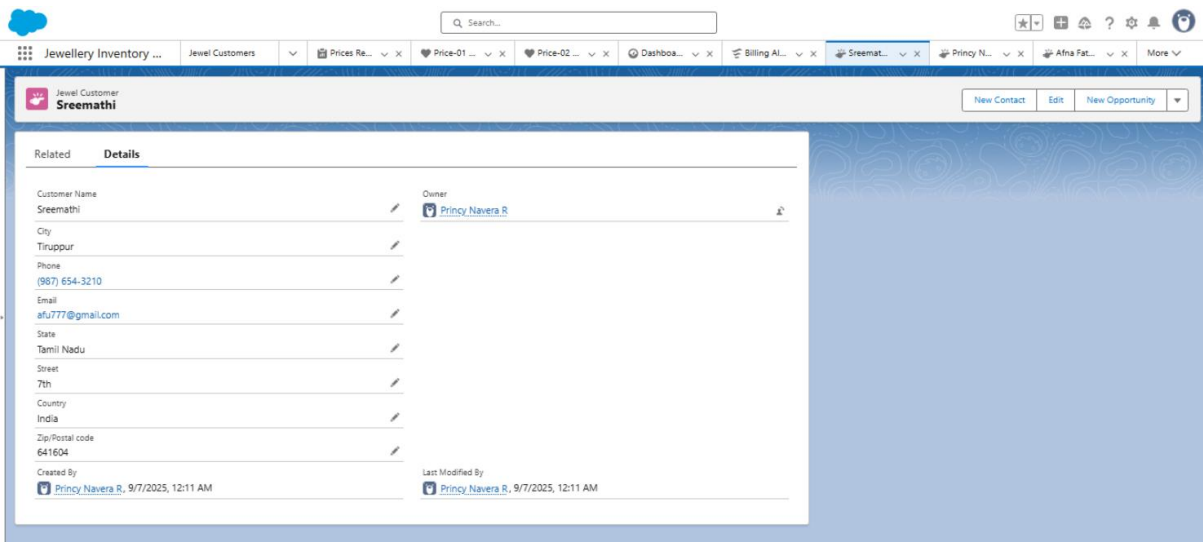
- Search bar: Search...
- Tabs: Jewellery Inventory ..., Jewel Customers, Prices Re..., Price-01 ..., Price-02 ..., Dashboa..., Billing AL..., Sreemat..., Princy N..., Afna Fat..., More

**Customer Details:**

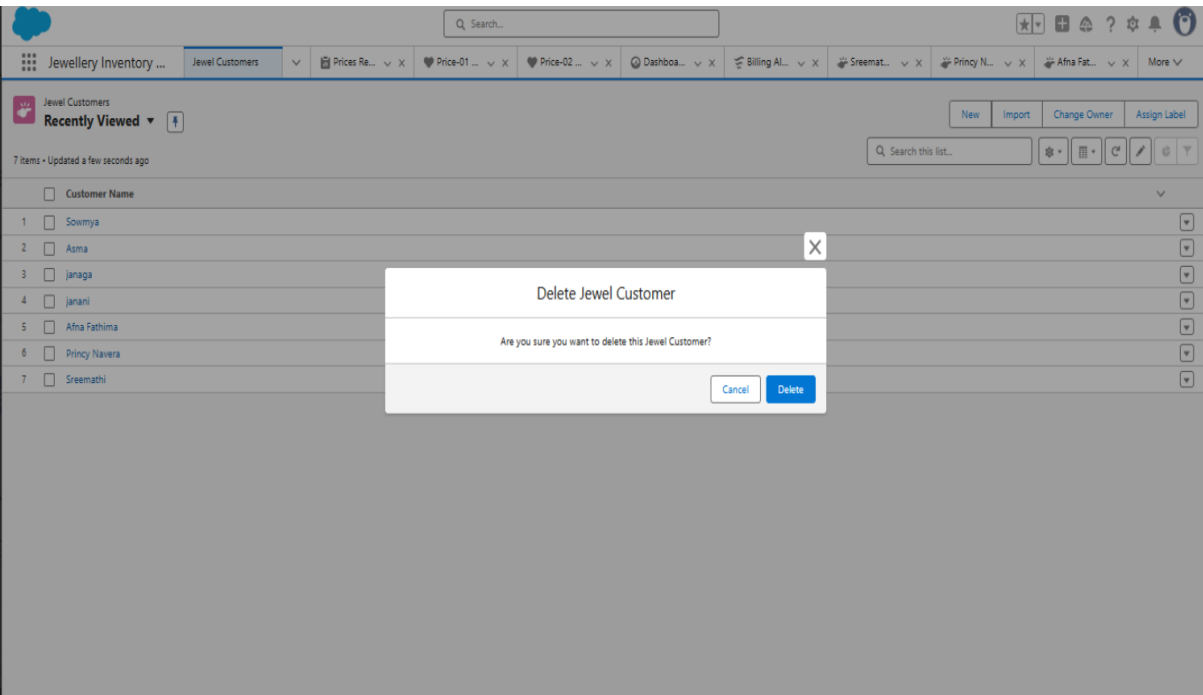
Field	Value	Action
Customer Name	Sreemathi	Edit
City	Tiruppur	Edit
Phone	(987) 654-3210	Edit
Email	afu777@gmail.com	Edit
State	Tamil Nadu	Edit
Street	7th	Edit
Country	India	Edit
Zip/Postal code	641604	Edit
Created By	Princy Navera R, 9/7/2025, 12:11 AM	
Last Modified By	Princy Navera R, 9/7/2025, 12:11 AM	

**Buttons:** New Contact, Edit, New Opportunity

# View a Record (Jewel Customer)



# Delete a Record (Jewel Customer)



■ **Reports**  
Create Report

Jewellery Inventory ...

Reports

Prices Report

Price-01 | Price

Price-02 | Price

Dashboard1

Billing Alter Flow | FL...

Reports

Recent

1 item

Q Search recent reports...

New Report

New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Prices Report		Private Reports	Princy Navera R	8/28/2025, 5:02 AM	
Created by Me						
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

**Reports**

Jewellery Inventory ...

Reports

Prices Report

Price-01 | Price

Price-02 | Price

Dashboard1

Billing Alter Flow | FL...

Report: Prices

Prices Report

Enable Field Editing

Q

Add Chart

Edit

Total Records

2

Total Gold Price

\$18,500

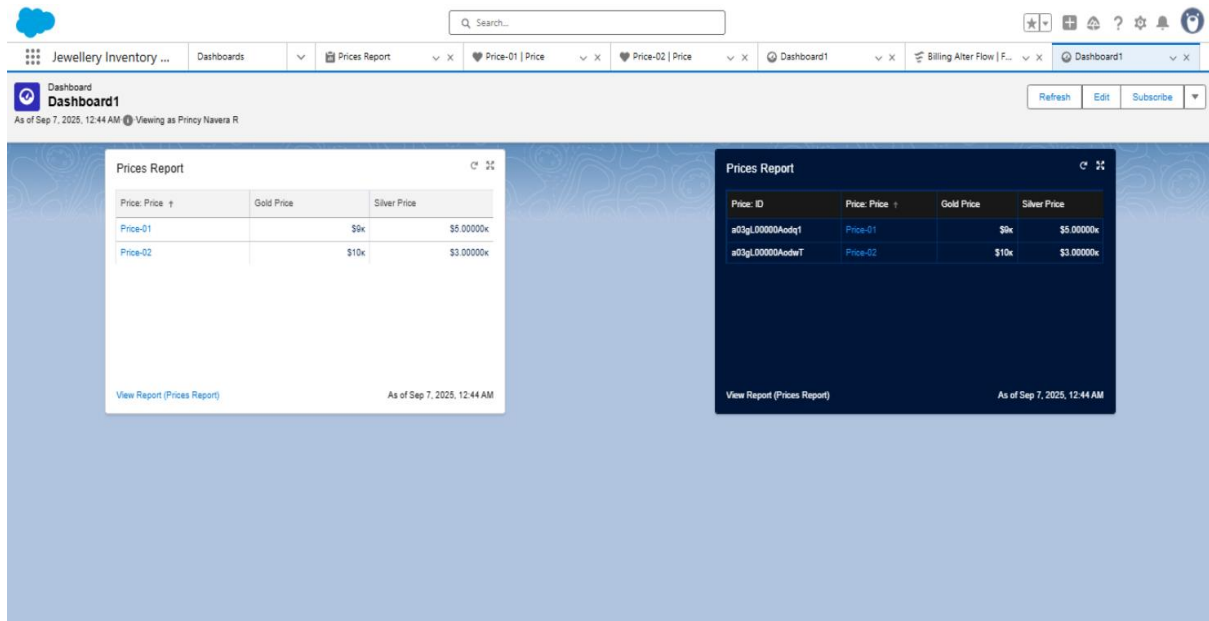
Total Silver Price

\$8,000.00000

	Price: Price	Gold Price +	Silver Price
1	Price-02	\$9,500	\$3,000.00000
2	Price-01	\$9,000	\$5,000.00000
3		\$18,500	\$8,000.00000

## ■ Dashboards

### Create Dashboard



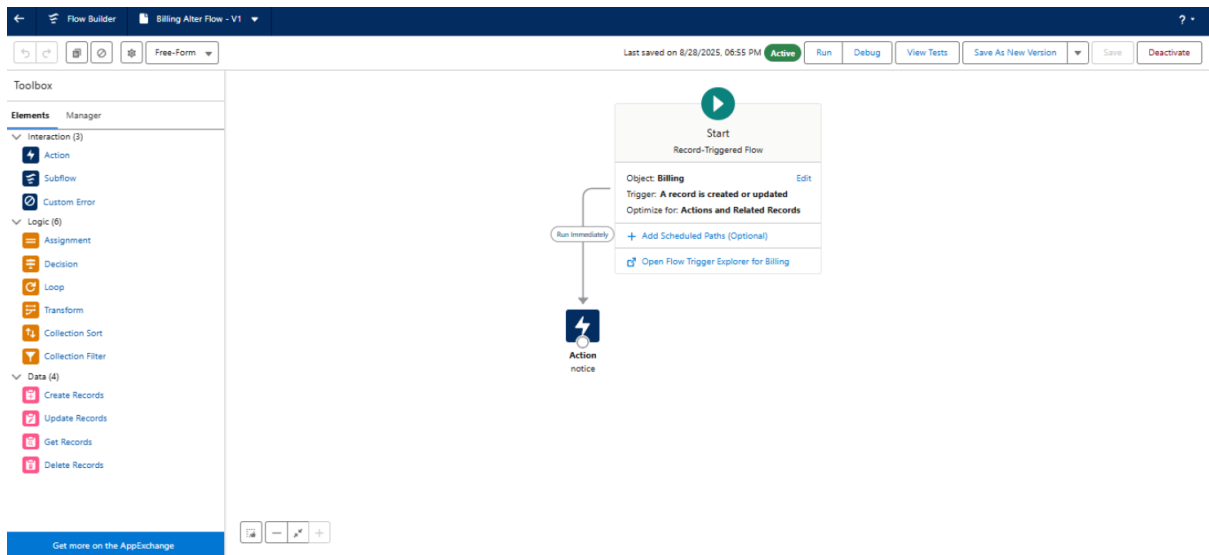
The screenshot shows a Salesforce dashboard interface. At the top, there's a navigation bar with a search bar and several tabs: 'Jewellery Inventory ...', 'Dashboards', 'Prices Report', 'Price-01 | Price', 'Price-02 | Price', 'Dashboard1', and 'Billing Alter Flow | F...'. Below the navigation bar, the dashboard title 'Dashboard1' is displayed, along with a timestamp 'As of Sep 7, 2025, 12:44 AM' and a user profile 'Viewing as Princy Navera R'. The main content area features a 'Prices Report' table with the following data:

Price: Price ↑	Gold Price	Silver Price
Price-01	\$9k	\$5.00000k
Price-02	\$10k	\$3.00000k

At the bottom of the report, there are links for 'View Report (Prices Report)' and 'As of Sep 7, 2025, 12:44 AM'.

## ■ FLOW

### CREATE FLOW



The screenshot shows the Salesforce Flow Builder interface for a flow named 'Billing Alter Flow - V1'. The flow is currently 'Active' and was last saved on 8/28/2025, 06:55 PM. The flow diagram consists of two steps:

- Start**: A 'Record-Triggered Flow' with the following configuration:
  - Object: Billing
  - Trigger: A record is created or updated
  - Optimize for: Actions and Related Records
  - Buttons: + Add Scheduled Paths (Optional), Open Flow Trigger Explorer for Billing
- Action**: An 'Action' step with a lightning bolt icon, labeled 'Action notice'.

The left sidebar shows the 'Toolbox' with various elements categorized under 'Interaction (3)', 'Logic (6)', and 'Data (4)'. The 'Interaction' category includes 'Action', 'Subflow', and 'Custom Error'. The 'Logic' category includes 'Assignment', 'Decision', 'Loop', 'Transform', 'Collection Sort', and 'Collection Filter'. The 'Data' category includes 'Create Records', 'Update Records', 'Get Records', and 'Delete Records'.

THIS IS THE LAST STEP OF CRM APPLICATION FOR JEWEL APPLICATION.

NOW THE JEWEL INVENTORY SYSTEM IS ACTIVATED.

## **CONCLUSION**

THE CRM APPLICATION FOR JEWEL MANAGEMENT HAS BEEN SUCCESSFULLY DEVELOPED AND CONFIGURED BY CREATING CUSTOM OBJECTS , FIELDS , PROFILES , ROLES ,USERS,PAGELAYOUTS,RECORD TYPES,PERMISSION SETS ,TRIGGERS ,REPORTS, DASHBOARDS AND FLOWS. THIS IMPLEMENTATION ENABLES EFFICIENT TRACKING AND MANAGEMENT OF JEWELLERY INVENTORY, CUSTOMER DETAILS AND RELATED OPERATIONS. THE SYSTEM IS NOW FULLY FUNCTIONAL AND READY FOR USE, PROVIDING A STREAMLINED, USER FRIENDLY SOLUTION FOR JEWEL MANAGEMENT AND SUPPORTING IMPROVED BUSINESS PROCESSES.