



PROJECT DOCUMENTATION

Project Title

CRM Application for Jewel Management – (Admin)

Project Overview

This project is a Salesforce Admin-based CRM application designed to manage jewel inventory, customers, orders, billing, and pricing efficiently. It automates business processes using Salesforce features such as custom objects, relationships, validation rules, reports, dashboards, and flows.

Objectives

- Manage jewel customers and their purchase details
 - Track gold and silver items separately
 - Automate billing email notifications
 - Generate reports and dashboards for analysis
 - Improve data accuracy using validation rules
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Tools & Technologies

- Salesforce Lightning Experience
 - Salesforce Admin Tools
 - Reports & Dashboards
 - Record-Triggered Flows
 - Validation Rules
 - Permission Sets
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Custom Objects Created

- Jewel Customer

- **Item**
 - **Price**
 - **Customer Order**
 - **Billing**
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Relationships

- Item → Jewel Customer (Lookup)
 - Item → Price (Lookup)
 - Billing → Item (Lookup)
 - Item → Customer Order (Lookup)
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Tabs & App

- Created custom tabs for all objects
 - Created Lightning App **Jewellery Inventory System**
 - Added all tabs to the app
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Fields Configuration

- Picklist fields (Item Type, Priority, Order Status)
 - Formula fields (Amount, Total Weight, Making Charges, KDM, etc.)
 - Cross-object formula fields
 - Lookup relationships
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Record Types & Page Layouts

- **Gold Record Type**
 - Page Layout for Gold
 - **Silver Record Type**
 - Page Layout for Silver
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Validation Rules

- Postal code validation
 - Mandatory field validation for Jewel Customer
 - Mandatory field validation for Item
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Profiles & Permission Sets

- Gold Smith Profile
 - Worker Profile
 - Permission Set to manage Item record types
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Reports Created

- Item Report
 - Jewel Customer Report
 - Billing Report
 - Customer Order Report
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Dashboards Created

- Item Dashboard
 - Billing Dashboard
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Automation (Flow)

- **Billing Email Notification Flow**
 - Trigger: When Billing record is created or updated
 - Action: Sends email to customer with billing details
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Outcome

The application successfully manages jewel inventory operations, automates communication, and provides insights through reports and dashboards.

Conclusion

This project demonstrates strong hands-on experience in Salesforce Admin concepts including data modeling, security, automation, and reporting.