TITLE: CRM Application for Jewel Management

Project Overview:

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.

Objectives:

1. Enhance Customer Relationship Management

Build stronger, long-term relationships with customers by maintaining detailed customer profiles and interactions.

2. Streamline Sales and Order Management

Optimize the sales process from inquiry to order fulfilment for increased efficiency and accuracy.

3. Improve Inventory and Product Management

Ensure efficient handling of jewellery inventory and product details.

4. Enable Targeted Marketing and Campaign Management

Increase customer engagement and sales through data-driven marketing.

5. Boost Operational Efficiency

Reduce manual tasks and errors through automation and integration.

6. Provide Business Insights and Analytics

Use data to support strategic decisions and identify business trends.

7. Support Omnichannel Customer Experience

Provide a seamless experience to customers across all touchpoints.

8. Ensure Data Security and Compliance

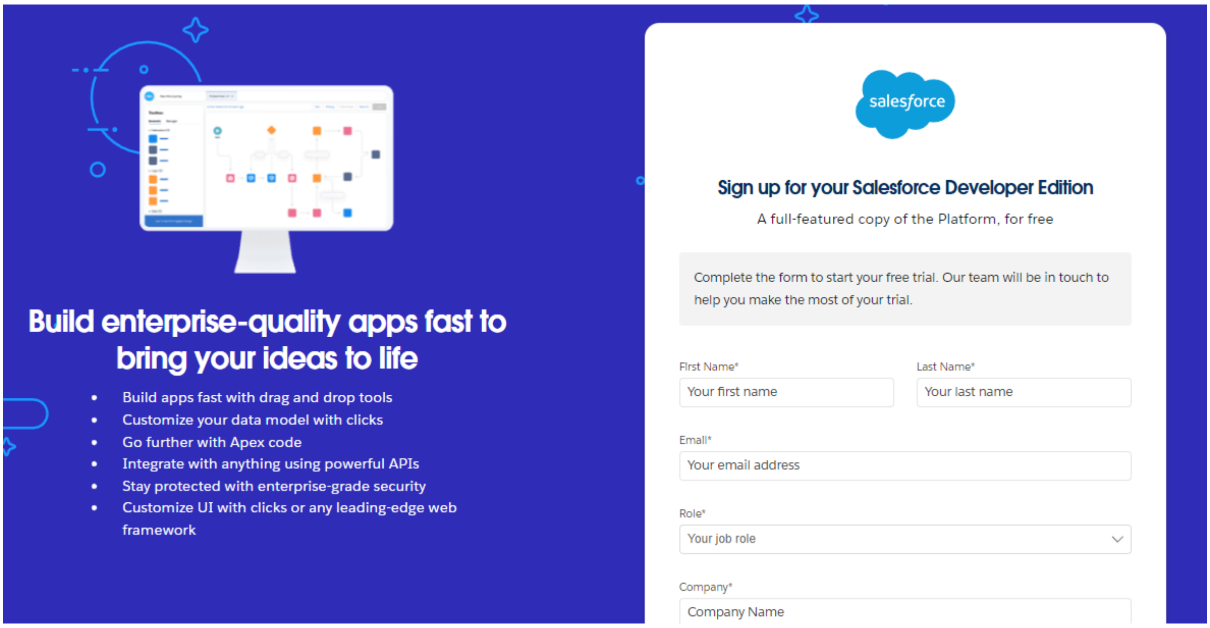
Protect sensitive customer and business data and ensure regulatory compliance.

Module: Salesforce

Activity 1: Creating Developer Account

Creating a developer org in salesforce.

1. Go to https://developer.salesforce.com/signup
2. On the Sign up form, enter the following details:



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

This need not be an actual email id, you can give anything in the format: username@organization.com

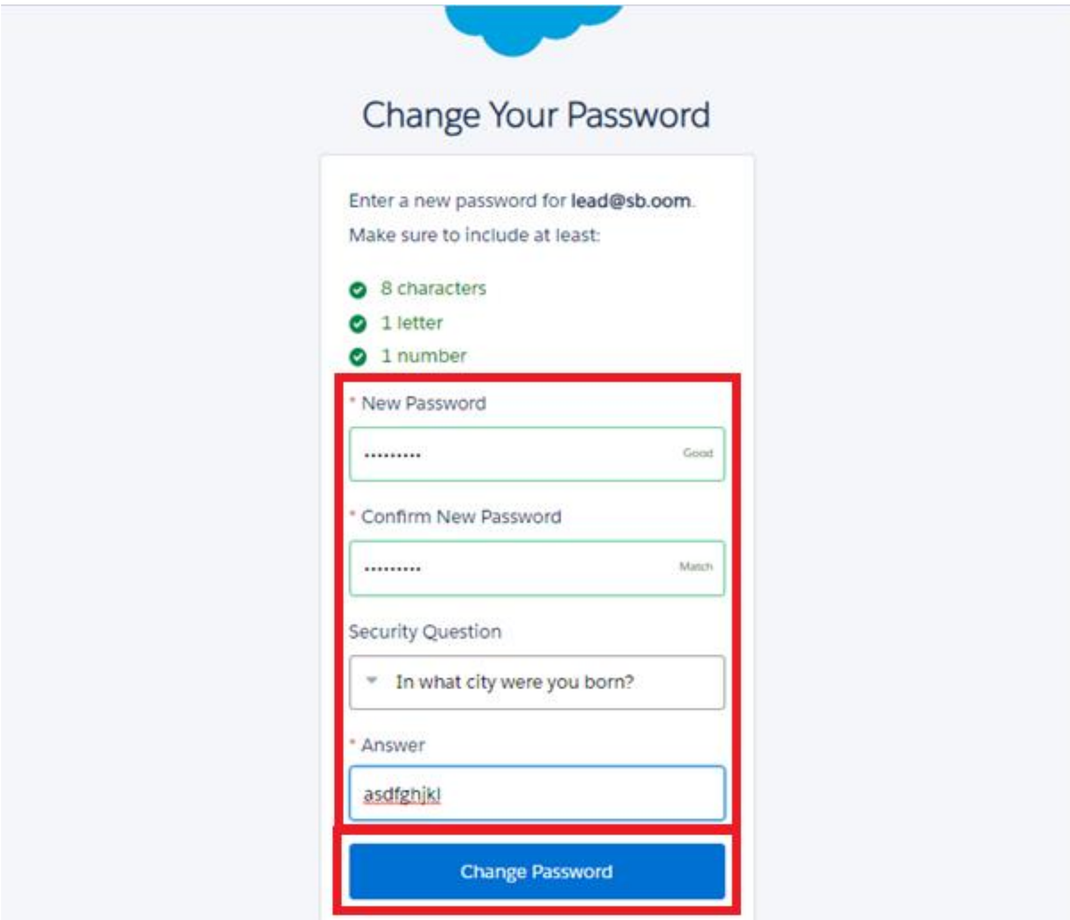
Click on sign me up after filling these.

Activity 2: Account Activation

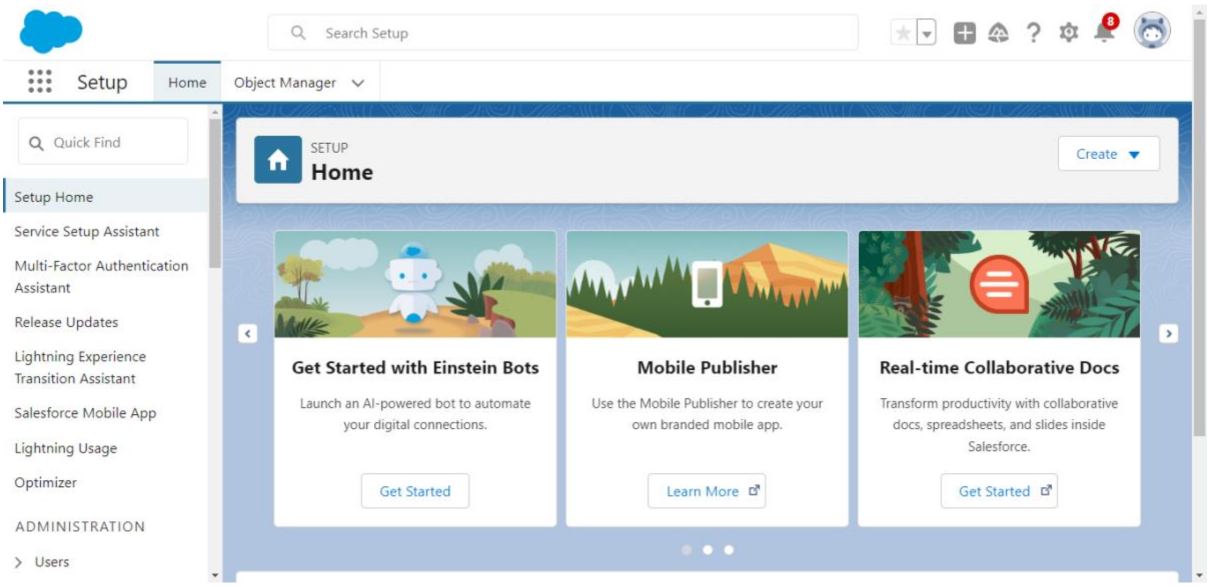
1. Go to the inbox of the email that you used while signing up. Click on the Reset Password to activate your account. The email may take 5-10mins.

2. Click on Reset Password

3. Give a password and answer a security question and click on change password.



4. Then you will redirect to your salesforce setup page.



Module: Object

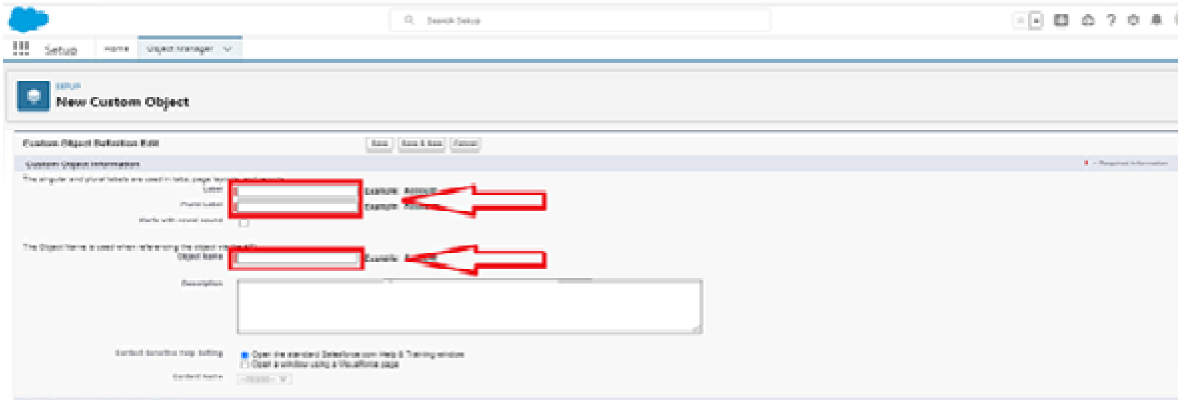
Activity 3: Create Jewel Customer Object

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

To create an object:

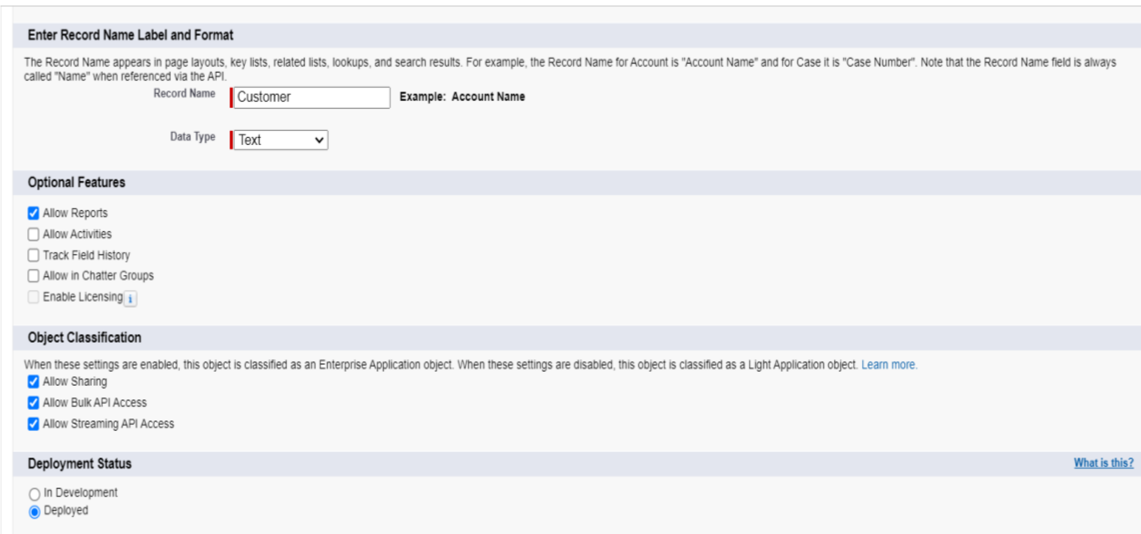
1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

1. Enter the label name: Jewel Customer
2. Plural label name: Jewel Customers



3. Enter Record Name Label and Format

- Record Name >> Customer name
- Data Type >> Text



2. Click on Allow reports.

3. Allow search and click Save.

Activity 4: Create Item Object

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

To create an object:

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

1. Enter the label name >> Item

2. Plural label name >> Items

3. Enter Record Name Label and Format

- Record Name >> Item Id
- Data Type >> Auto Number
- Display Format >> Item- {00}
- Starting Number >> 1

2. Click on Allow reports.

3. Allow search >> Save.

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

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

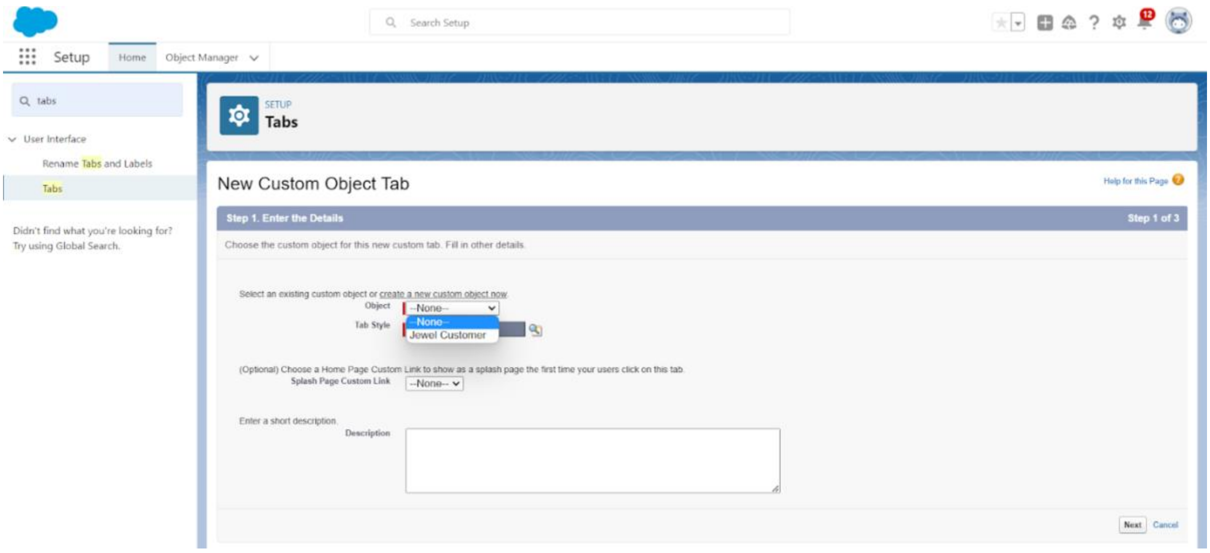
Module: Tabs

Activity 5: Creating a Custom Tab

To create a Tab:(Customer)

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

2. Select Object (Jewel Customer) >> Select any tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) keep it as default >> Save.



Activity 6: To create a Tab:(Item)

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

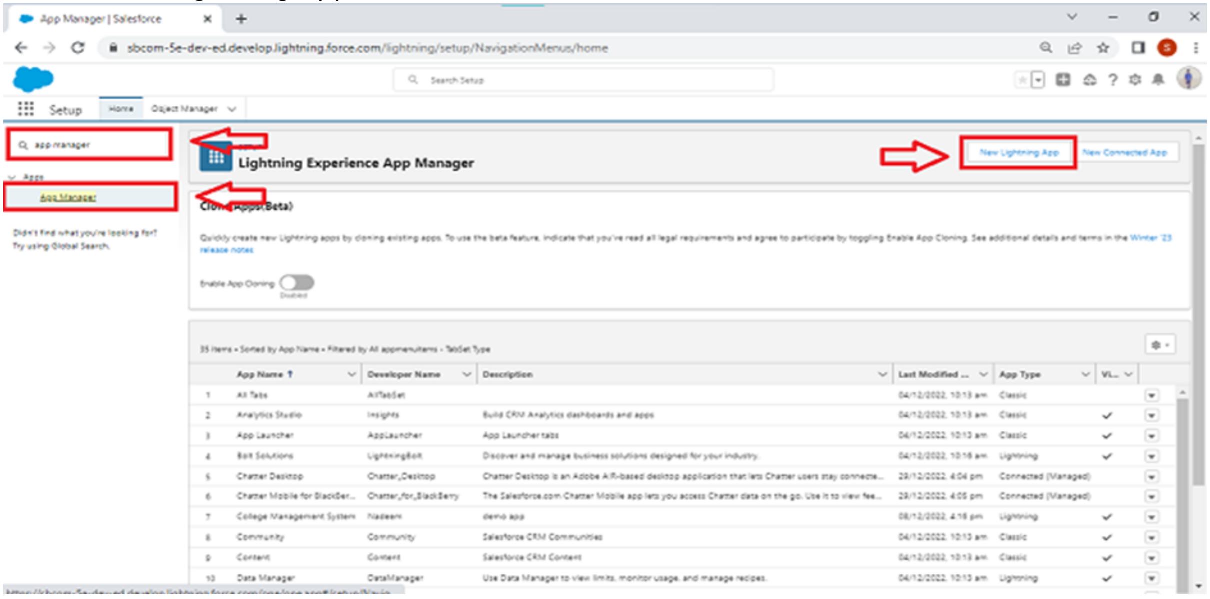
Note: Now create tabs for Customer Order, Price, Billing objects.

Module: The Lightning App

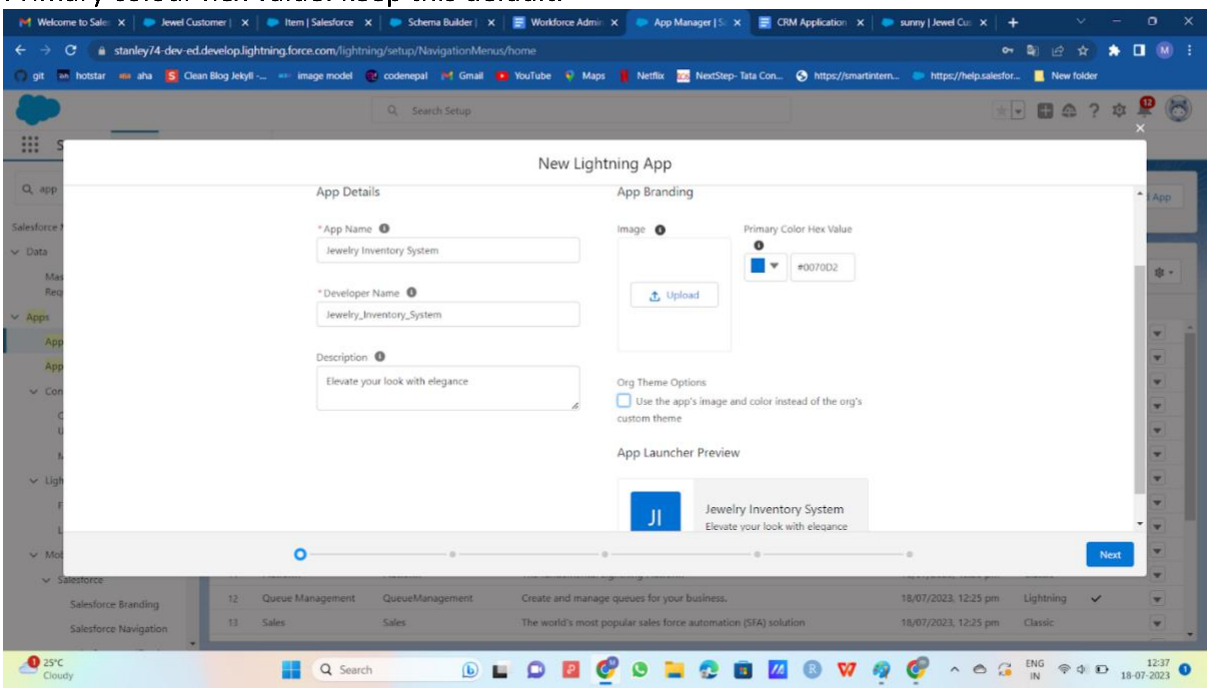
Activity 7: Create a Lightning App

To create a lightning app page:

1. Go to setup page >> search “app manager” in quick find >> select “app manager” >>
2. click on new lightning App.

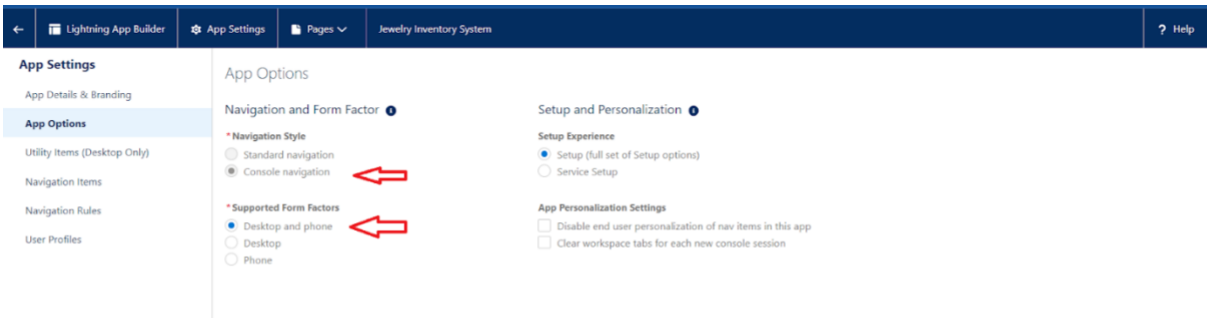


3. Fill the app name in app details and branding as follow
   App Name: Jewellery Inventory System.
   Developer Name: This will auto generate
   Description: Elevate your look with elegance
   Image: optional (if you want to give any image you can otherwise not mandatory)
4. Primary colour hex value: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



5. Then click Next >> (App option page) Set Navigation Style as Console Navigation >> Next.

+



4. (Utility Items) keep it as default >> Next.

Module: Fields

Activity 8: Creating Lookup Relationship

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

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

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

Activity 9: Creating A Master-Detail Relationship

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

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

To Create a Master-Detail relationship:

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

2.Click on fields & relationships >> click on New.

3.Select “Master-Detail relationship” as data type and click Next.

4.Select the related object “Item”.

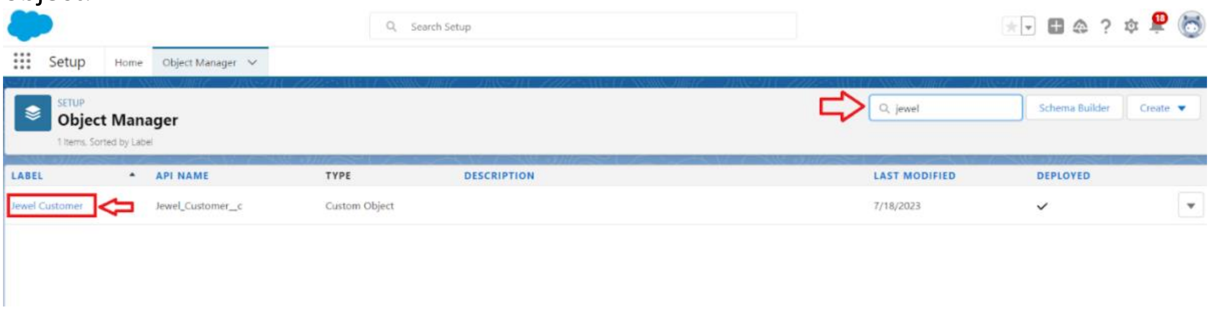
5.Give Field Label as “Item” and click Next.

6.Next >> Next >> Save.

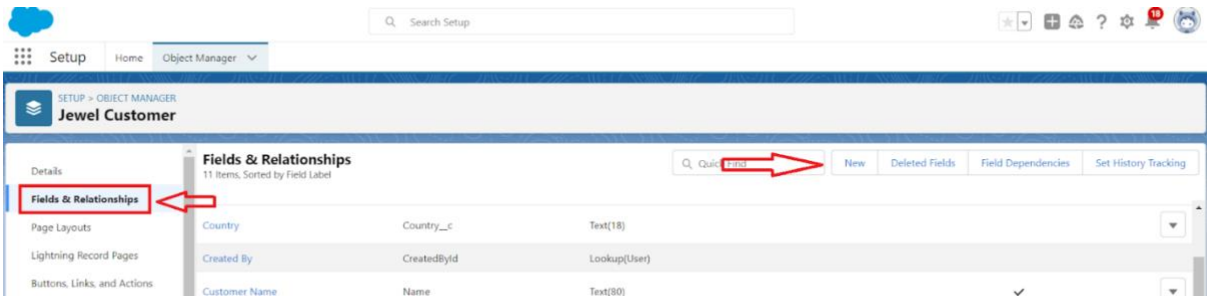
Activity 10: Creating Text Field in Jewel Customer Object

To create fields in an object:

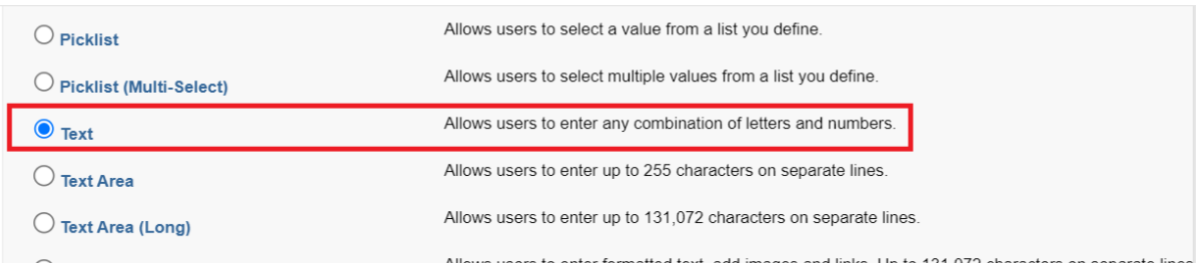
1. Go to setup >> click on Object Manager >> type object name (Jewel Customer) in quick find bar >> click on the object.



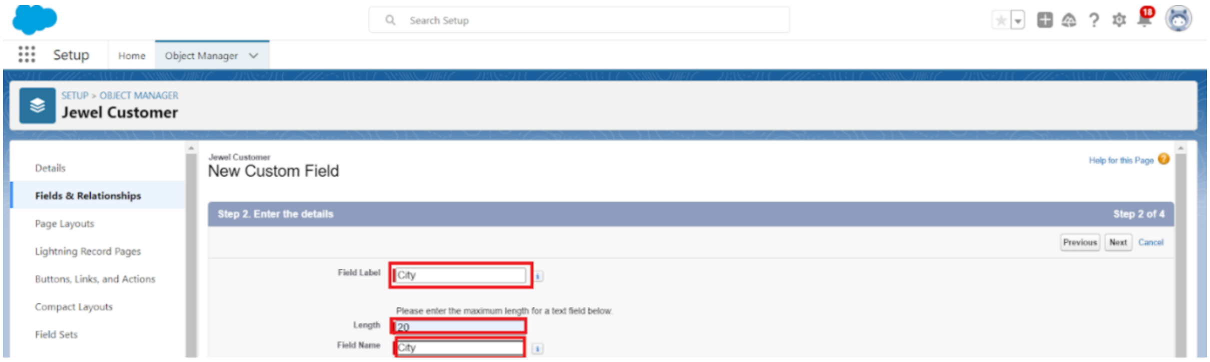
2. Now click on “Fields & Relationships” >> New



3. Select Data type as “Text”.



4. Click on Next

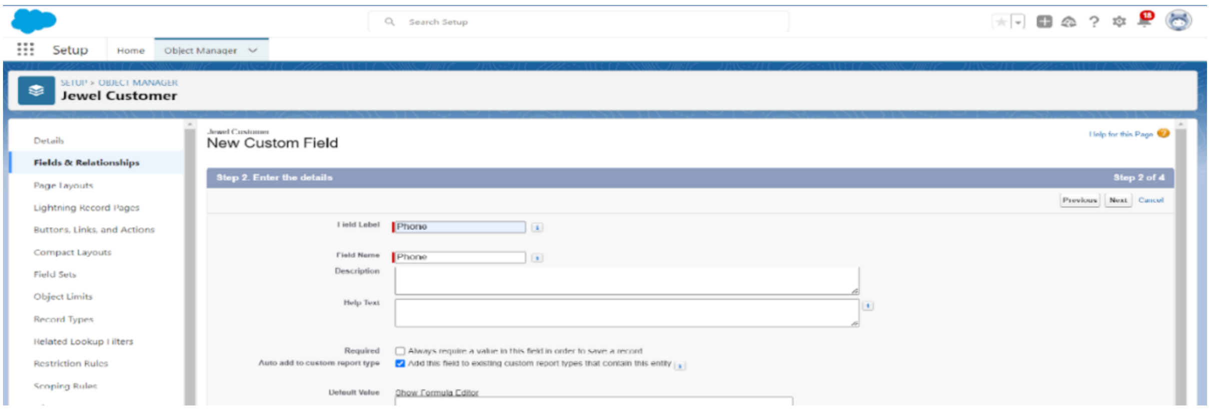


5. Fill the above as following:
   - Field Label: City
   - Length: 20
   - Field Name: gets auto generated
   - Click on Next >> Next >> Save and new.

Activity 11: Creating the Phone field in object Jewel Customer

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Jewel Customer) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as "Phone" and click Next.
4. Given the Field Label as "Phone".



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

Activity 12: Creating the Email field in object Jewel Customer

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Jewel Customer) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New

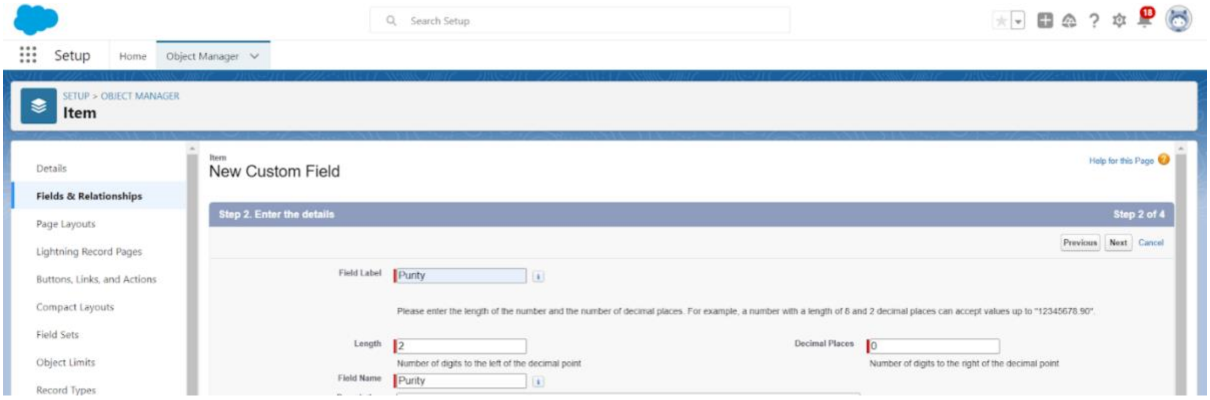
3. Select Data type as “Email” and click Next.
4. Given the Field Label as “Email”.

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

Activity 13: Creating the number field in Item object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar? click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Number” and click Next.
4. Given the Field Label as “Purity” and length as “2”.

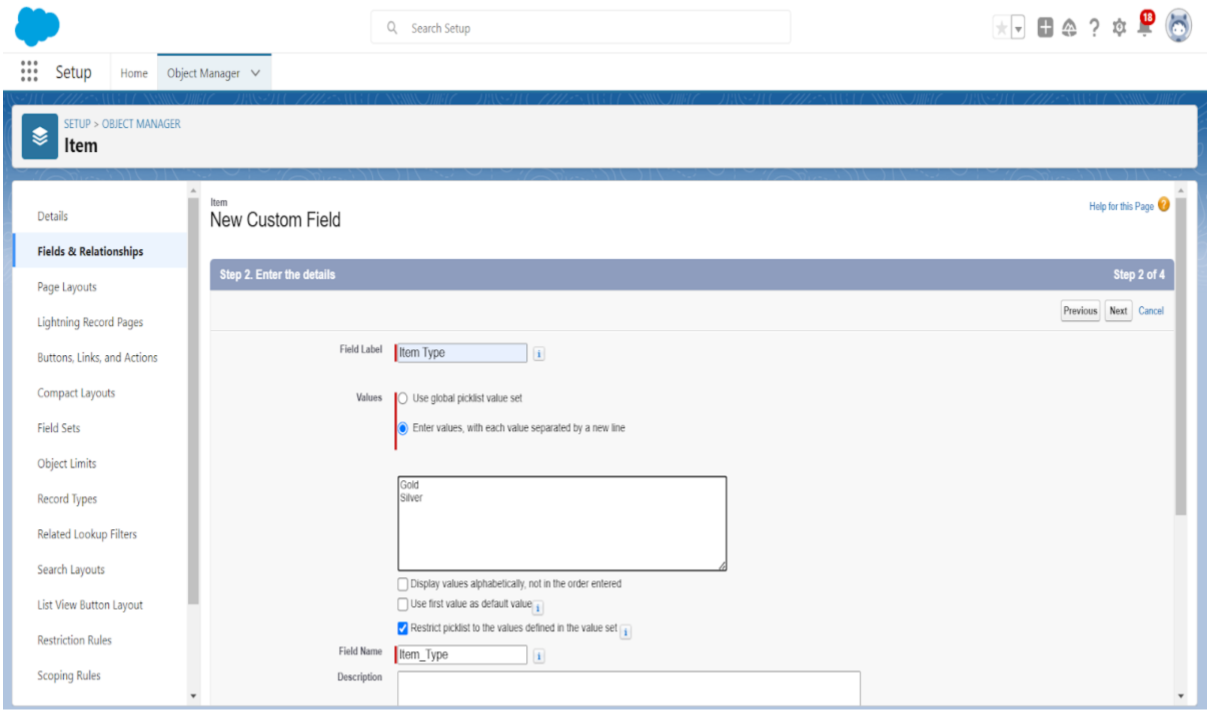


5. Field Name will be auto populated, and click on Next >> Next >> Save.

Activity 14: Creating Picklist Field in Item Object

To create fields in an object:

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

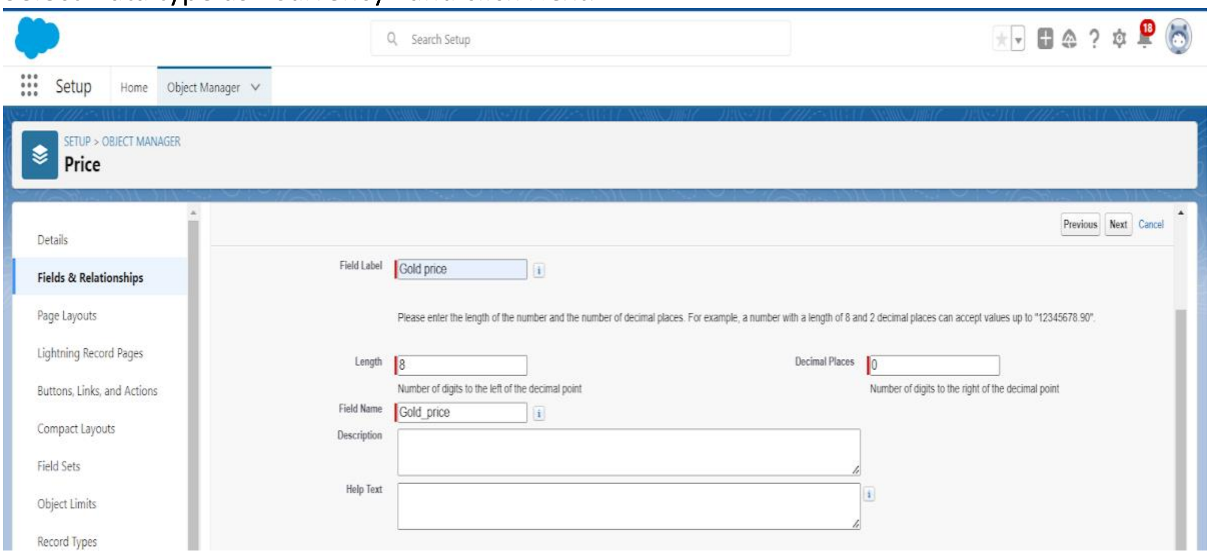


6. Click Next? Next? Next? Save.

Activity 15: Creating Currency Field in Price Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Price) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select Data type as “Currency” and click Next.



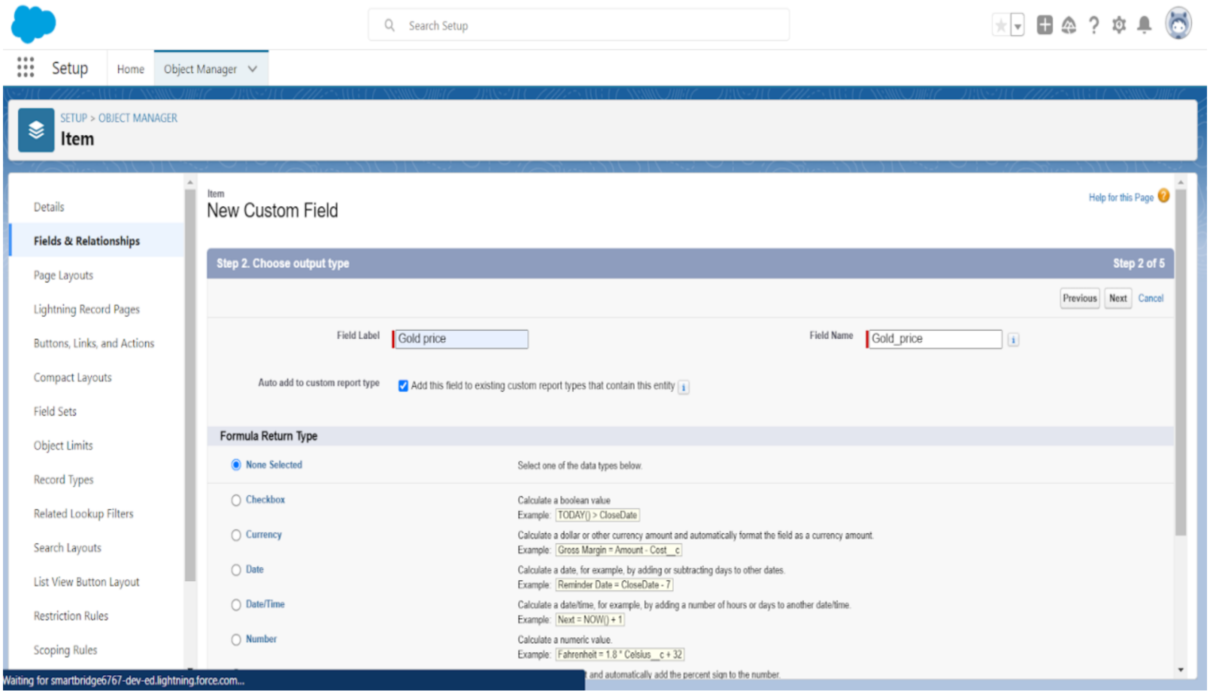
4. Enter Field Label as “Gold Price” and length as “8”and decimal 0. Fields name will be auto generated.
5. Click Next >> Next >> Next >> Save.

Activity 16: Creating Formula Field (Cross Object) in Item Object

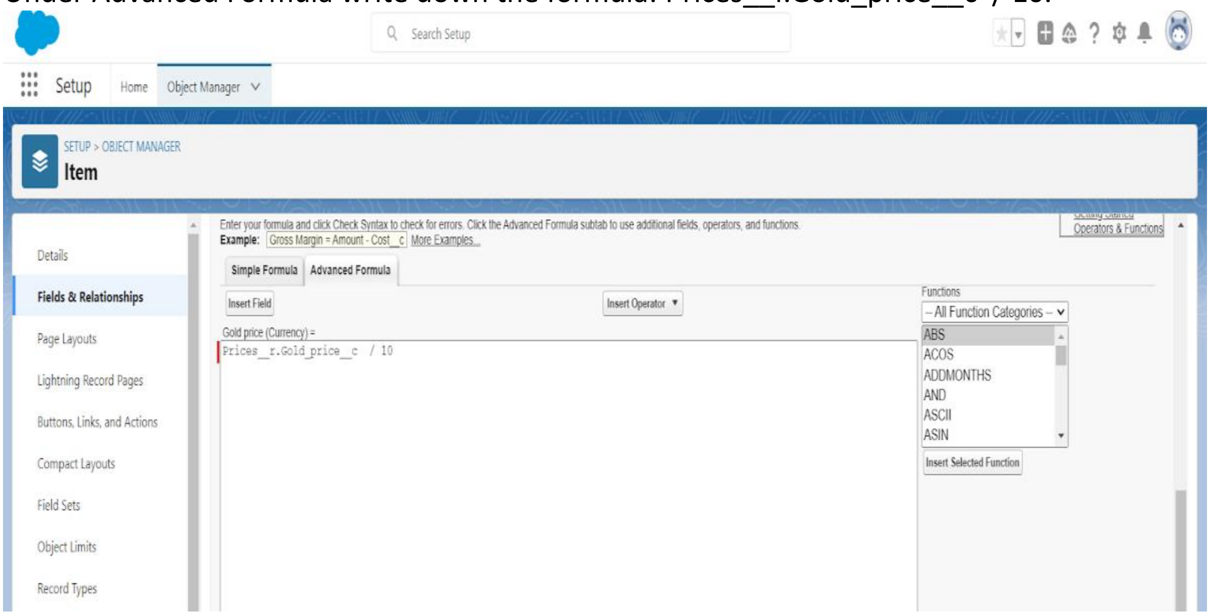
To create fields in an object:

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

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



5. Under Advanced Formula write down the formula: Prices__r.Gold_price__c / 10.



6. click “Check Syntax” and Next >> Next >> Save & New.

Activity 17: Creating Remaining Fields in Objects

Now create the remaining fields using the data types mentioned.

<table>
<tr><th>s.no</th><th>Object name</th><th>Fields</th></tr>
<tr><td>1</td><td>Jewel Customer</td><td>
<table>
<tr><th>Field Name</th><th>Data type</th></tr>
<tr><td>State</td><td>Text (20)</td></tr>
<tr><td>Street</td><td>Text (20)</td></tr>
<tr><td>Country</td><td>Text (18)</td></tr>
<tr><td>Zip/Postal code</td><td>Text (6)</td></tr>
</table>
</td></tr>
</table>

<table>
<tr><td>2</td><td>Price</td><td>
<table>
<tr><td>Silver Price</td><td>Currency
(Length=8, Decimal=5)</td></tr>
</table>
</td></tr>
</table>

<table>
<tr><td>3</td><td>Item</td><td></td></tr>
</table>

Field Label: Customer Name	Lookup Relationship with Jewel Customer Object
Ornament	Text (20)
Weight	Number (Length=8, Decimal=5)
Stone Weight	Number (Length=5, Decimal=5)
Percentage	Number (Length=2, Decimal=0)
Stone/Other Price	Currency (Length=8, Decimal=2)
Expected Days of Return	Picklist 1-3 Days 4-5 Days 6-7 Days 8-10 Days
Priority	Picklist Low Medium High Critical
Silver Price	Formula (Return Type: Number) (Decimal=3) (Prices__r.Silver_price__c / 1000)

Purity Gold Price	Formula (Return Type: Currency) (Decimal=2) ((Prices__r.Gold_price__c * Purity__c) / 24) / 10
Total Weight	Formula (Return Type: Number) (Decimal=3) (Weight__c - Stone_weight__c)
Amount	Formula (Return Type: Currency) (Decimal=3) IF(ISPICKVAL(Item_Type__c ,"Gold"), Total_weight__c * Purity_Gold_price__c , Total_weight__c * Silver_price__c)
KDM	Formula (Return Type: Currency) (Decimal=0) (Amount__c * Percentage__c) / 100
Making Charges	Formula (Return Type: Currency) (Decimal=0)

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

4	Customer Order	Order Status	Picklist Started Not Started On Hold Completed Not Completed

5 Now create the remaining fields using the data types mentioned.

s.no	Object name	Fields
1	Jewel Customer	

Field Name	Data type
State	Text (20)
Street	Text (20)
Country	Text (18)
Zip/Postal code	Text (6)

2	Price	

Silver Price	Currency (Length=8,Decimal=5)

3	Item	

Field Label: Customer Name	Lookup Relationship with Jewel Customer Object
Ornament	Text (20)
Weight	Number (Length=8,Decimal=5)
Stone Weight	Number (Length=5,Decimal=5)
Percentage	Number (Length=2,Decimal=0)
Stone/Other Price	Currency (Length=8,Decimal=2)
Expected Days Of Return	Picklist 1-3 Days 4-5 Days 6-7 Days 8-10 Days
Priority	Picklist

	Low Medium High Critical
Silver Price	Formula (Return Type: Number) (Decimal=3) (Prices__r.Silver_price__c / 1000)
Purity Gold Price	Formula (Return Type: Currency) (Decimal=2) ((Prices__r.Gold_price__c * Purity__c) / 24) / 10
Total Weight	Formula (Return Type: Number) (Decimal=3) (Weight__c - Stone_weight__c)
Amount	Formula (Return Type: Currency) (Decimal=3)

	IF (ISPICKVAL (Item_Type__c,"Gold"), Total_weight__c* Purity_Gold_price__c , Total_weight__c * Silver_price__c)
KDM	Formula (Return Type: Currency) (Decimal=0) (Amount__c * Percentage__c) / 100
Making Charges	Formula (Return Type: Currency) (Decimal=0) IF(ISPICKVAL(Item_Type__c ,"Gold"), Weight__c * 300 , Weight__c * 10)

4	Customer Order	
		Order Status | Picklist: Started, Not Started, On Hold, Completed, Not Completed

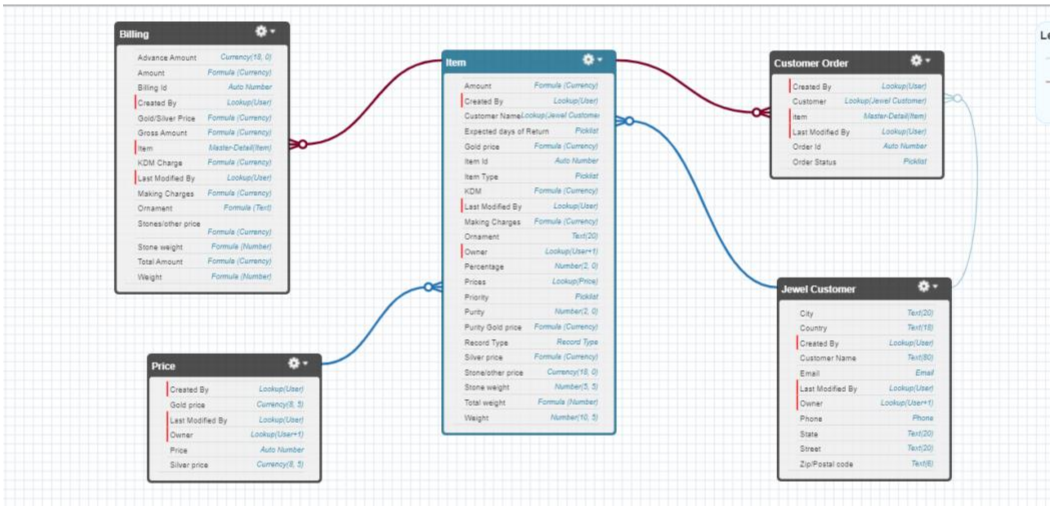
Order Status	Picklist
	Started Not Started On Hold Completed Not Completed

5	Billing	Field Label: Item	Lookup Relationship with Item Object
		Ornament	Formula (Return Type: Text) Item__r.Ornament__c
		Stone weight	Formula (Return Type: Number) (Decimal=2) Item__r.Stone_weight__c
		Weight	Formula Return Type: Number (Decimal=2) Item__r.Total_weight__c
		Amount	Formula (Return Type: Currency) (Decimal=2) Item__r.Amount__c
		Gold/Silver Price	Formula (Return Type: Currency) (Decimal=2) IF(ISPICKVAL(Item__r.Item_Type__c ,"Gold"), Item__r.Gold_price__c , Item__r.Silver_price__c)

KDM Charge	Formula (Return Type:Currency) (Decimal=0) Item__r.KDM__c
Making Charges	Formula (Return Type: Currency) (Decimal=2) Item__r.Making_Charges__c
Stones/other price	Formula (Return Type: Currency) (Decimal=2) Item__r.Stone_other_price__c
Total Amount	Formula (Return Type:Currency) (Decimal=0) Amount__c + KDM_Charge__c + Stones_other_price__c + Making_Charges__c

Activity 18: Schema Builder

Schema Builder is a powerful tool within Salesforce that allows you to visualise, explore, and design the relationships between objects in your Salesforce organisation. It provides a graphical representation of the data model, making it easier to understand the structure and connections between different objects.

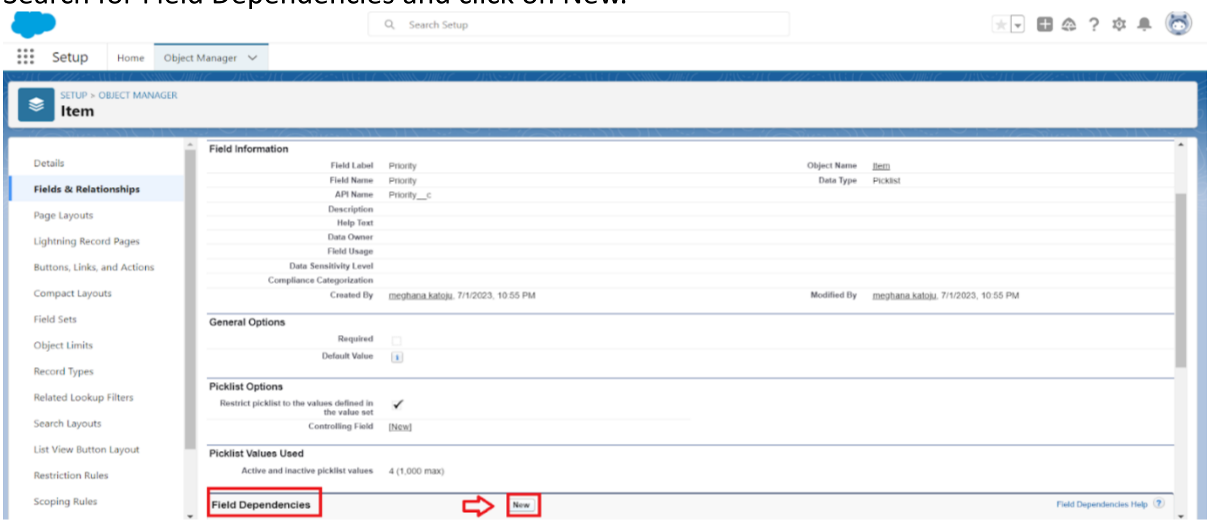


Activity 19: Creating the Field Dependencies

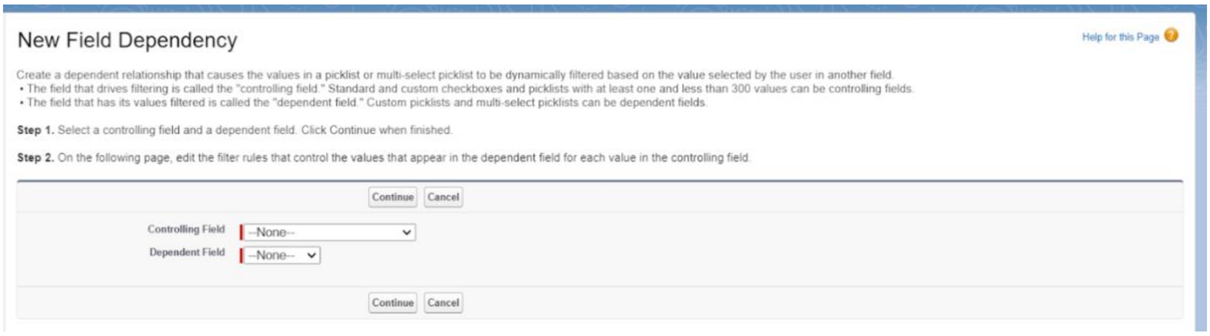
Use case:

Field Dependencies are used to create relationships between fields within an object. They allow you to control the visibility and availability of fields based on the values selected in other fields.

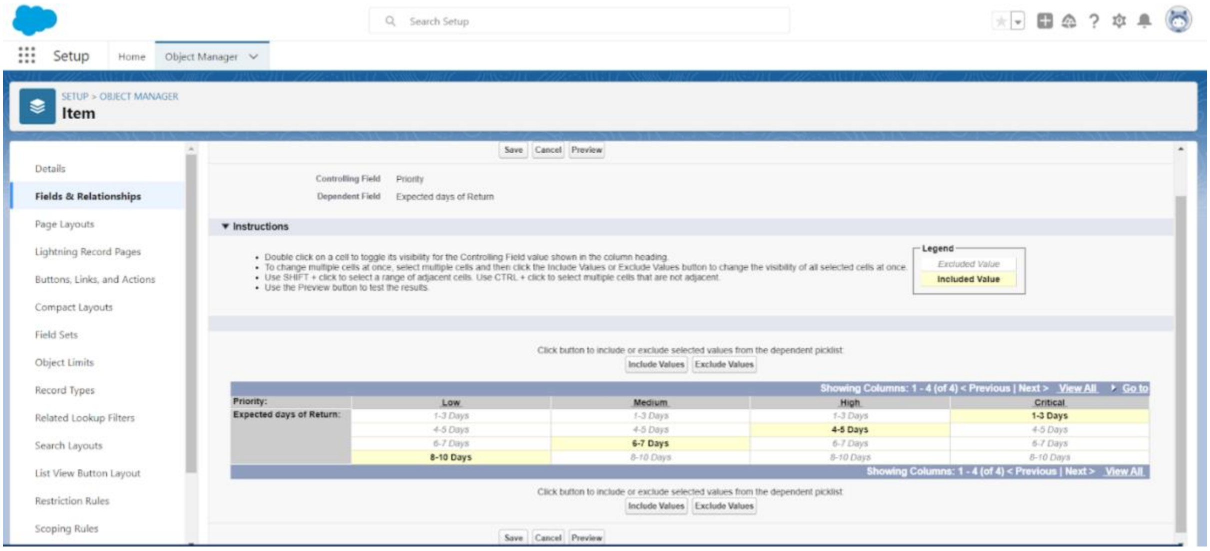
1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar >> click on the object.
2. Click on Fields & Relationships and click on the Priority field.
3. Search for Field Dependencies and click on New.



4. Select Controlling Field as “Priority” and Depending field as “Expected Days of Return” >> Continue.



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

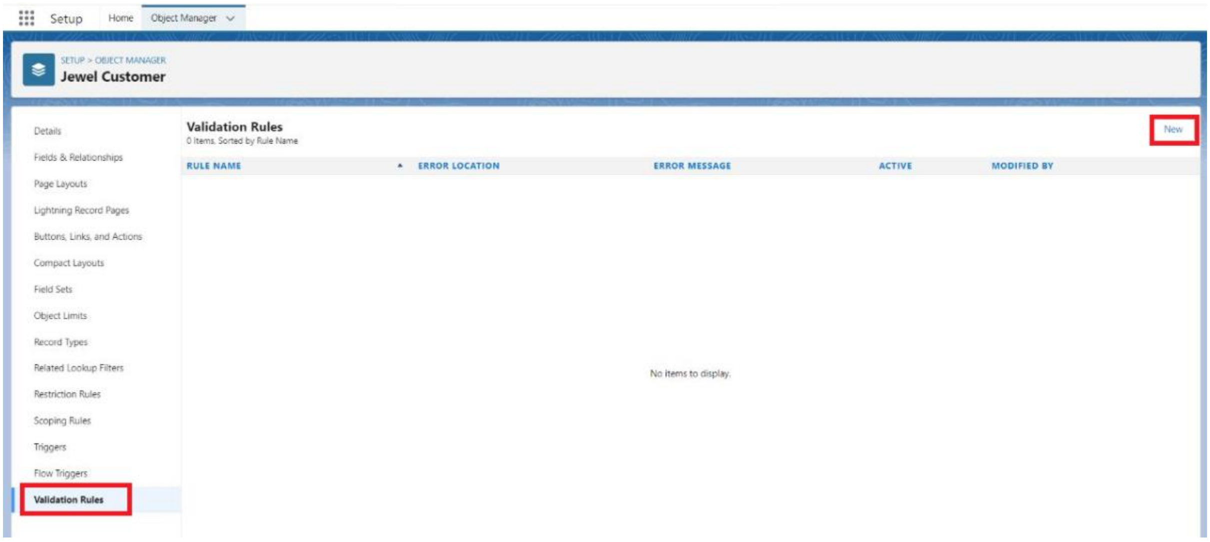


Activity 20: Creating the validation rule

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

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

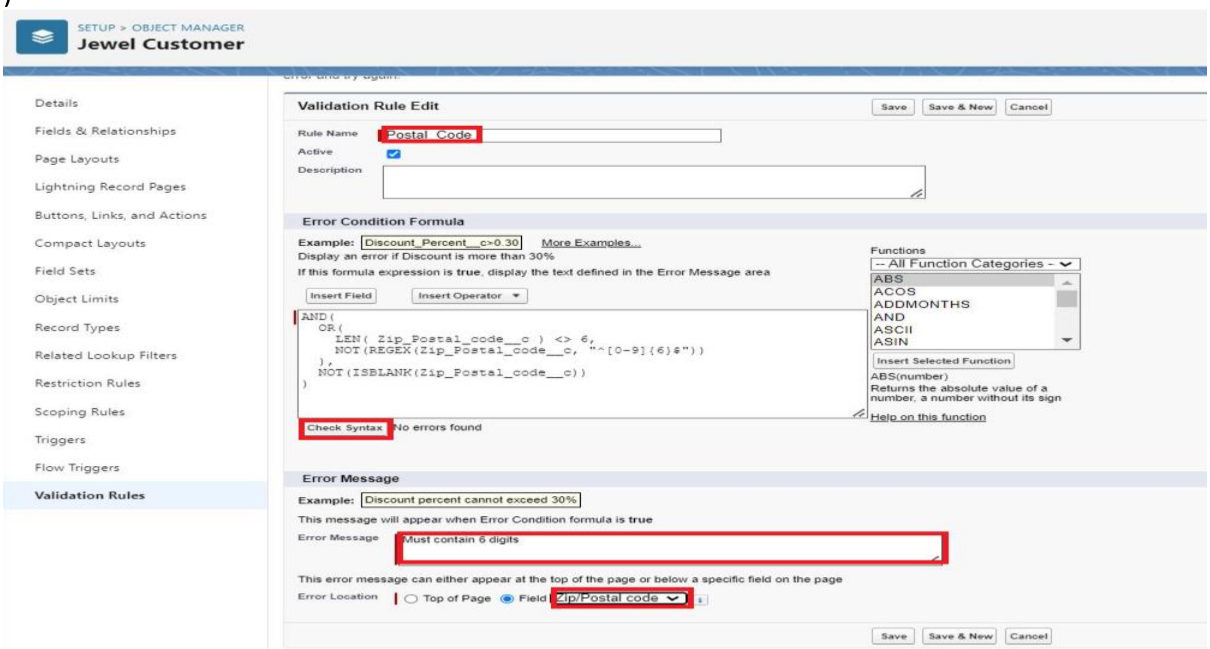
1. Go to setup >> click on Object Manager >> type object name (Jewel Customer) in quick find bar>> click on the object.
2. Click on the validation rule >> click New.



3. Enter the Rule name as “Postal Code “.

4. Insert the Error Condition Formula as : -

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



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

NOTE:

Create One more Validation rule for Jewel Customer object.

1. Enter Rule name as “ValidationRule For JewelCustomerObject “.

2. Insert the Error Condition Formula as : -
   OR(ISBLANK(City__c) , ISBLANK(Country__c),ISBLANK(Phone__c),ISBLANK(State__c),ISBLANK(Street__c))

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

Create Validation rule for Item object.

1. Enter Rule name as “ValidationRule For Item“.

2. Insert the Error Condition Formula as : -
   OR(ISBLANK(Amount__c) , ISBLANK(Customer_Name__c) ,ISBLANK(Gold_price__c),ISBLANK(KDM__c),ISBLANK(Ornament__c),ISBLANK(Percentage__c),ISBLANK(Making_Charges__c),ISBLANK(Prices__c),ISBLANK(Stone_weight__c),ISBLANK(Silver_price__c),ISBLANK(Stone_other_price__c),ISBLANK(Stone_weight__c),ISBLANK(Weight__c))

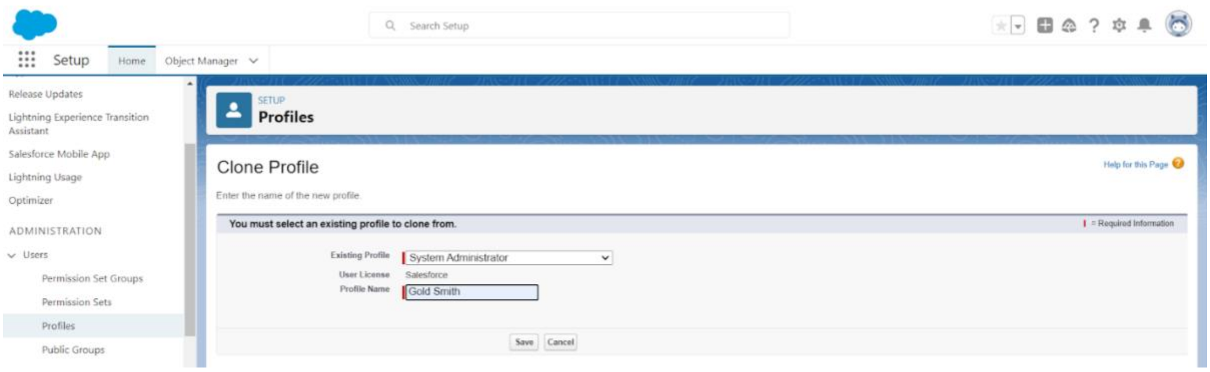
3. Enter the Error Message as “Please fill Required fields”, select the Error location as Top of Page and click Save.

Module: Profiles

Activity 21: Gold Smith Profile

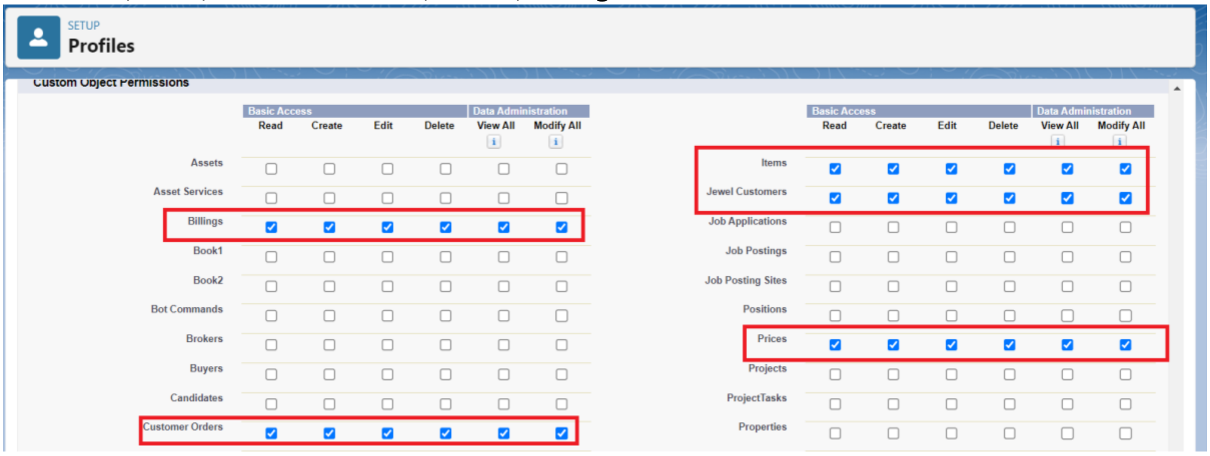
To create a new profile:

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



2. While still on the profile page, then click Edit.

3. Scroll down to Custom Object Permissions and Give access permissions for Jewel Customer, Item, Customer Order, Prices, Billings.



4. Scroll down and Click on Save.

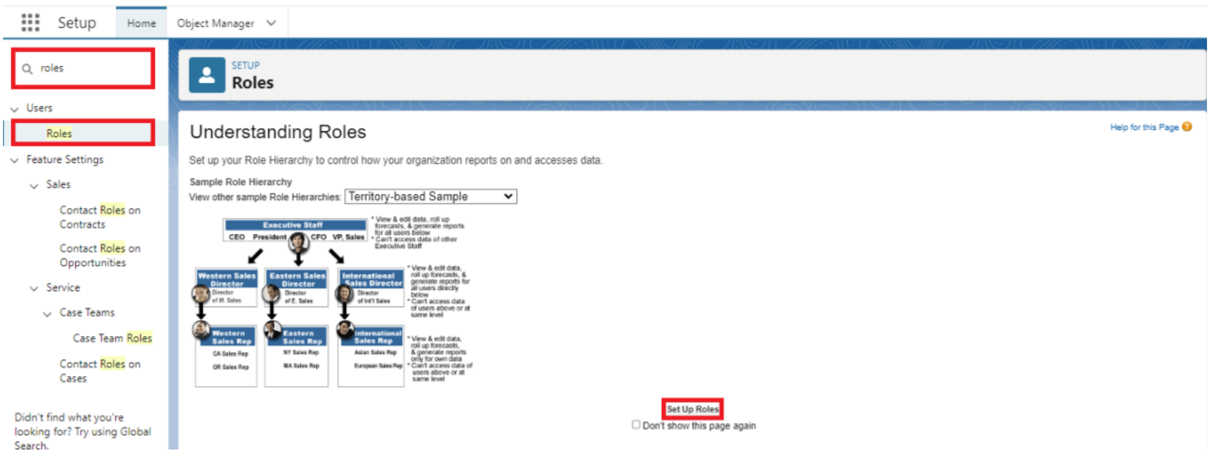
Activity 22: Worker Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Salesforce Platform User) >> enter profile name () >> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Items, Price and Customer Order objects.
4. Scroll down and Click on Save.

Module: Roles

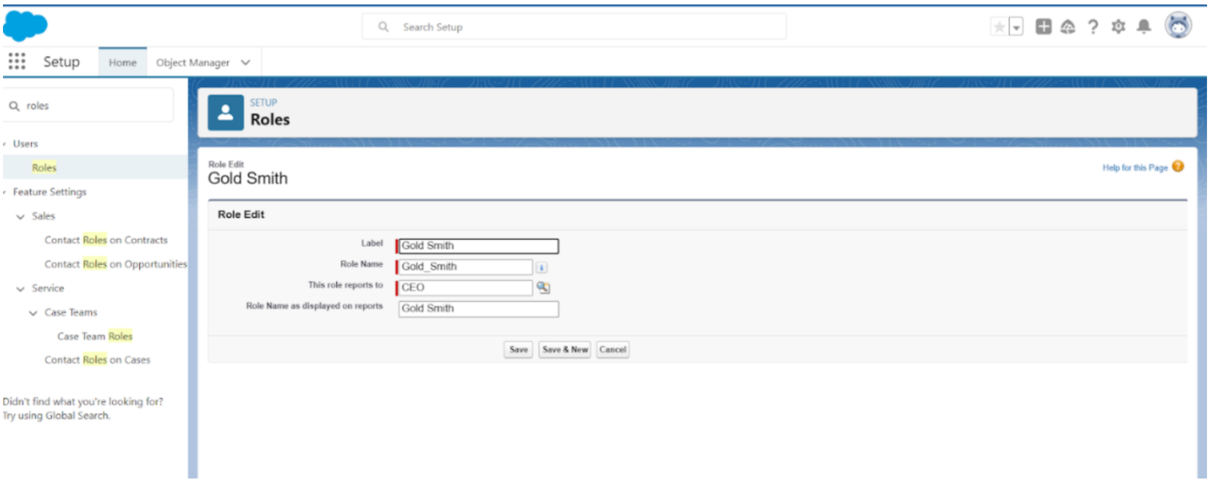
Activity 23: Creating Gold Smith Role

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

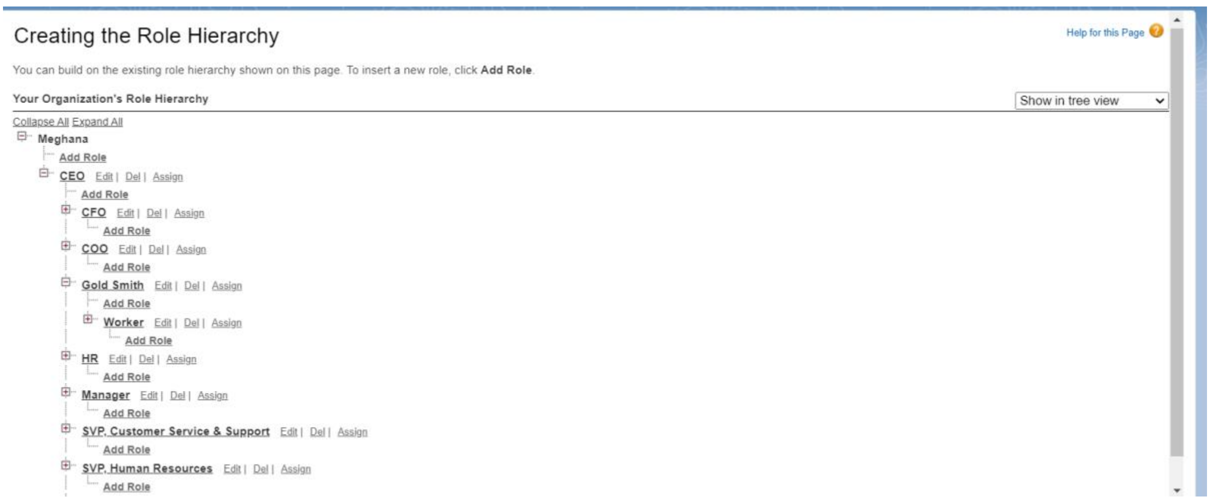


2. Click on Expand All and click on add role under whom this role works.

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



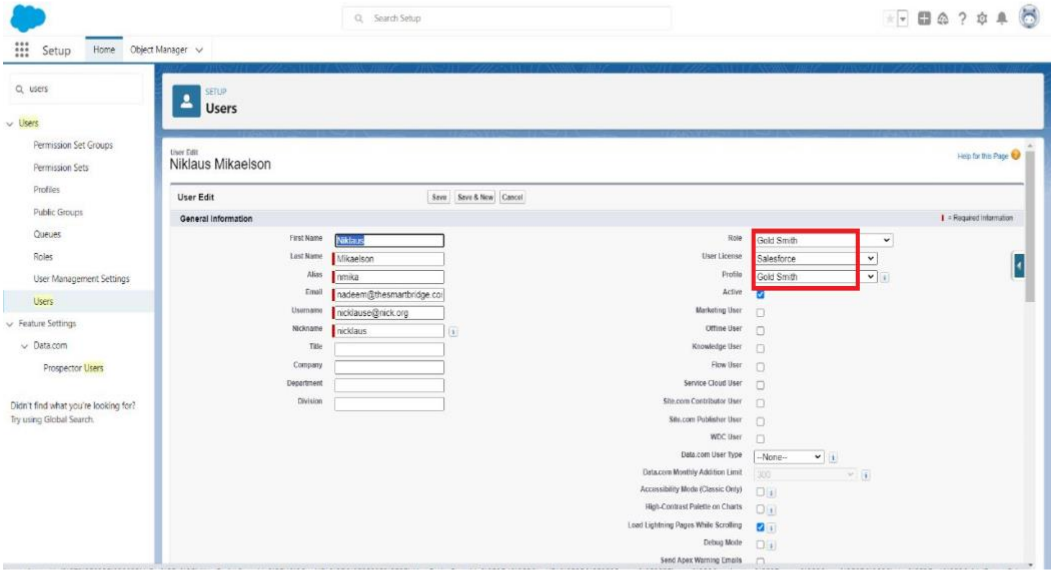
Activity 24: Create one more role as Worker which reports to Gold Smith



Module: Users

Activity 25: Create User

1. Go to setup >> type users in quick find box >> select users >> click new user.
2. Fill in the fields
1. First Name : Niklaus
2. Last Name : Mikaelson
3. Alias : Give a Alias Name
4. Email id : Give your Personal Email id
5. Username : Username should be in this form: text@text.text
6. Nick Name : Give a Nickname
7. Role : Gold Smith
8. User licence : Salesforce
9. Profiles : Gold Smith



1. Save.

Activity 26: Create User

1. Go to setup >> type users in quick find box >> select users >> click new user.
2. Fill in the fields

- First Name: Kol
- Last Name: Mikaelson
- Alias: Give an Alias Name
- Email id: Give your Personal Email id
- Username: Username should be in this form: text@text.text
- Nick Name: Give a Nickname

- Role: Worker
- User licence: Salesforce Platform
- Profiles: Worker

3. Save.

Note:

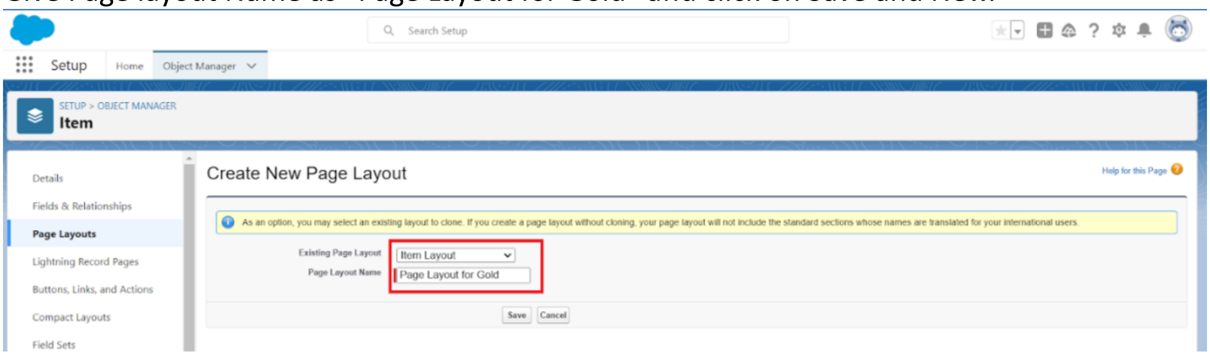
Create two more users as mentioned in activity 2 using the same profile.

Module: Page layouts

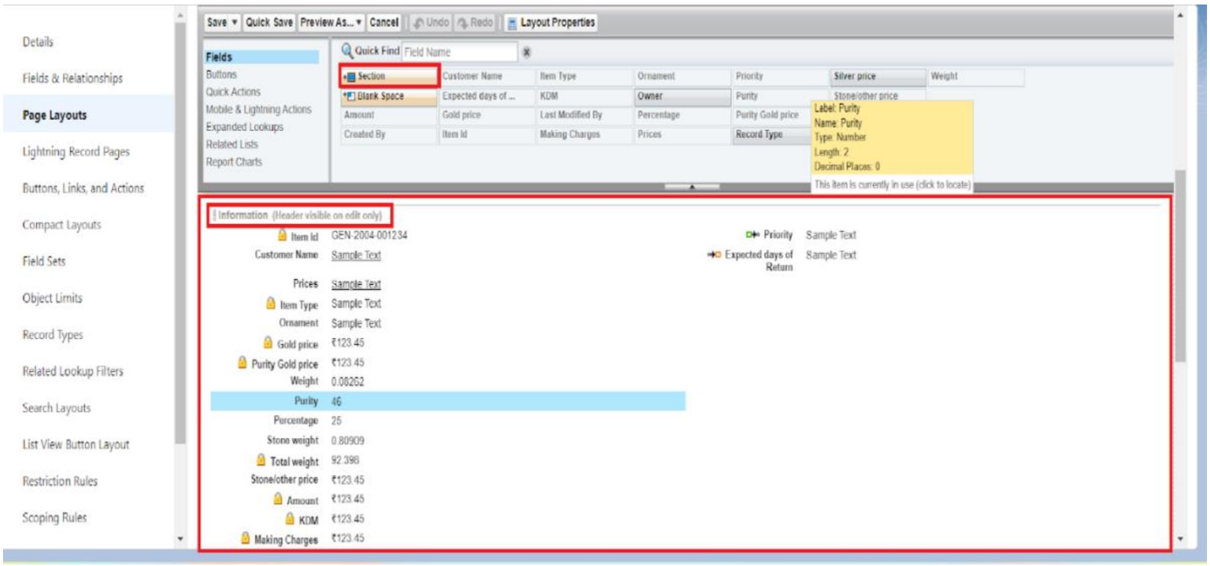
Activity 27: To Create a Gold Page layout

1. Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.
2. Click on Page layout >> Click on New.

3. Give Page layout Name as “Page Layout for Gold” and click on Save and New.



4. Arrange the field as shown in the Information Section, remove fields which are related to Silver and click Ok.



5. Click Save.

6. Make sure your page layout looks like the picture above.

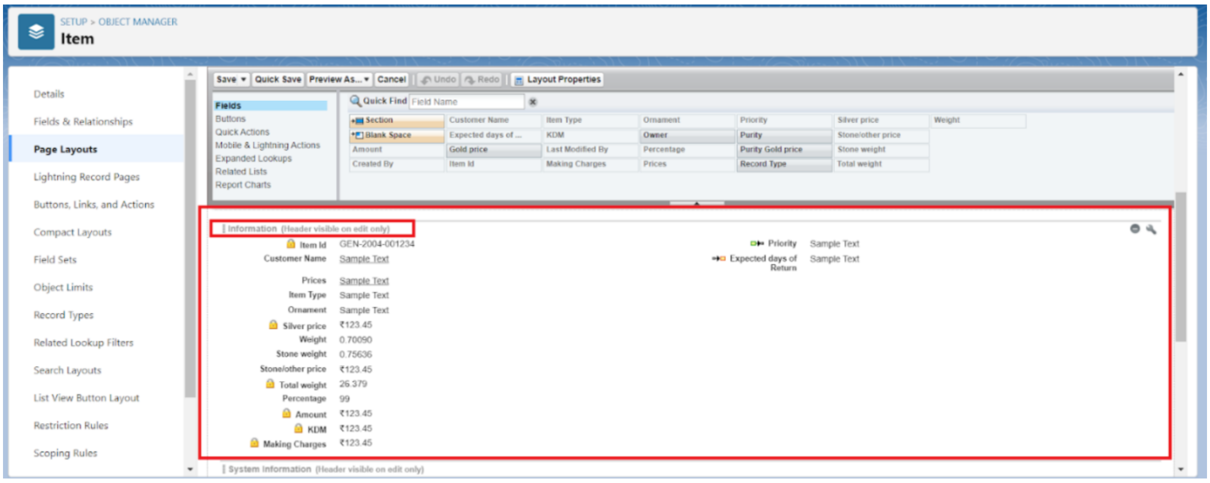
Activity 28: To Create a Silver Page layout

1. Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.

2. Click on Page layout >> Click on New.

3. Give Page layout Name as "Page Layout for Silver" and click on Save.

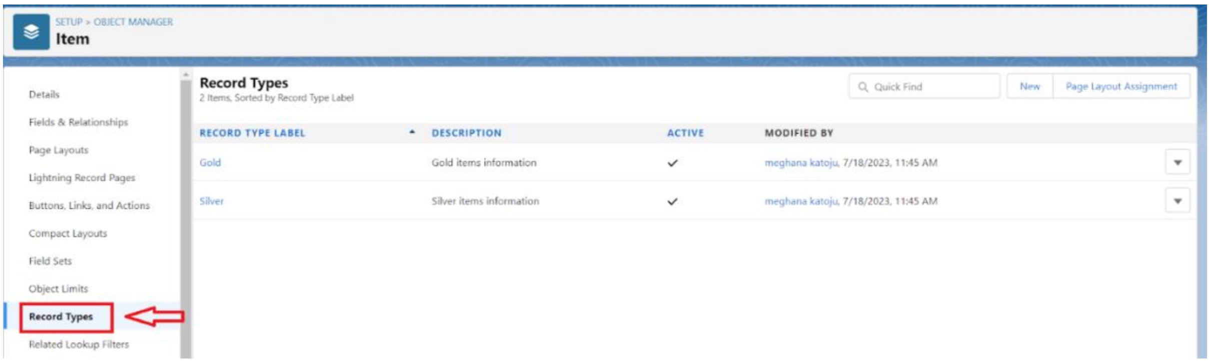
4. Arrange the field as shown in the Information Section, remove fields which are related to Gold and click Ok.



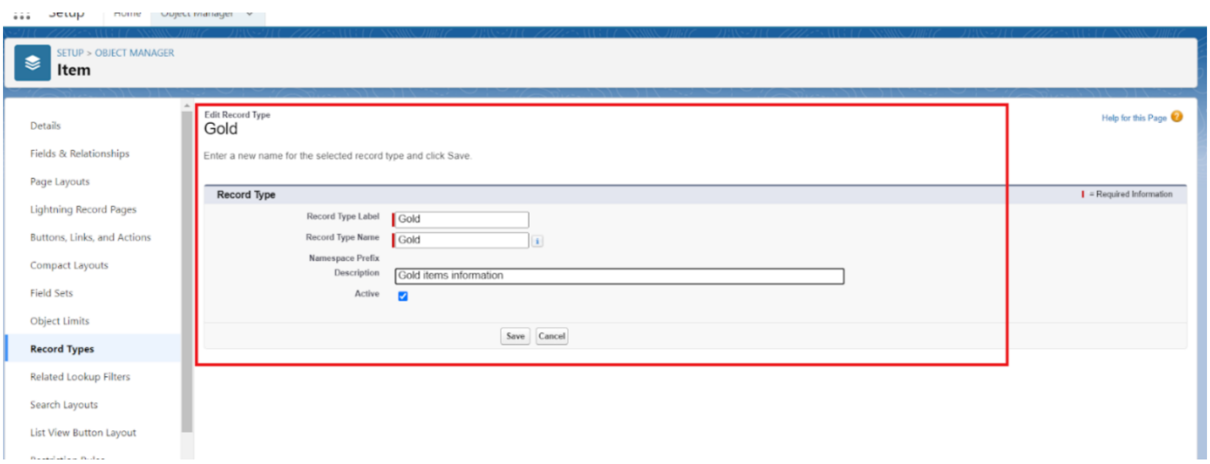
Module: Record Types

Activity 29: To create a Record Type

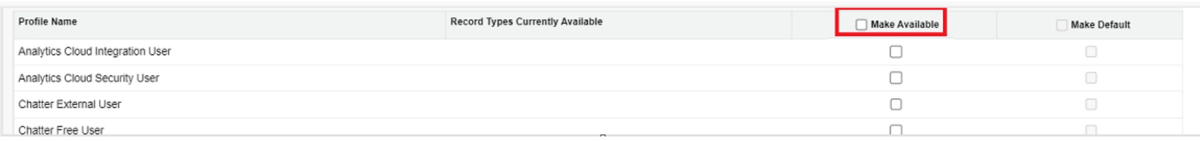
1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar? click on the object.
2. Click on the Record Types >> click New.



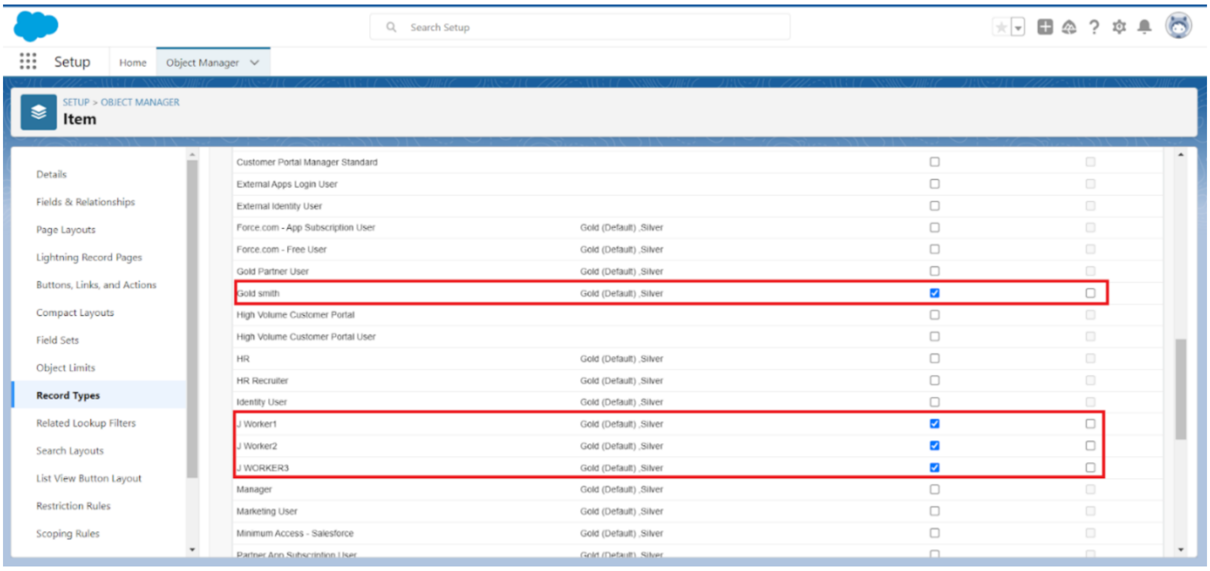
3. Select Existing Record as "Master", Record type Label as "Gold", Description as "Gold items information".



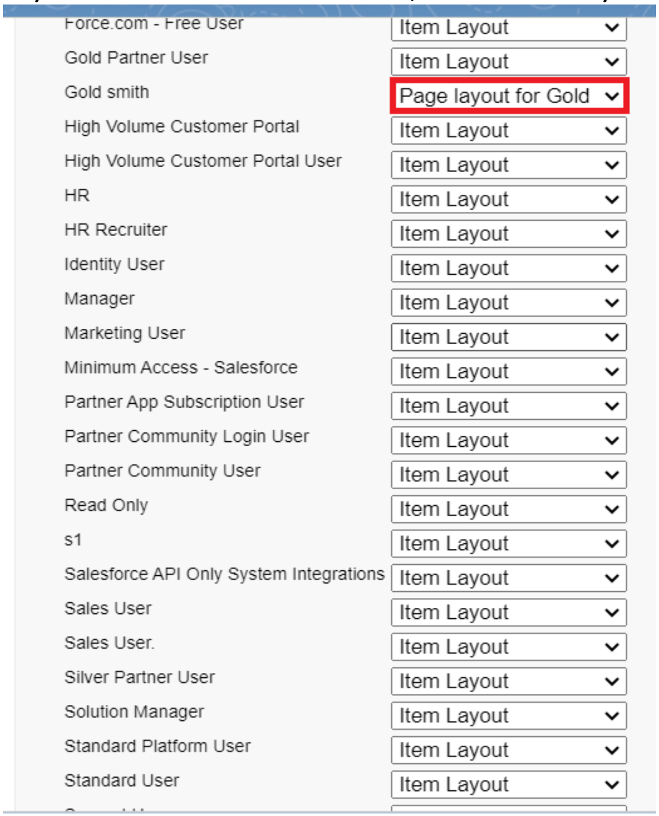
4. Uncheck for "Make Available".

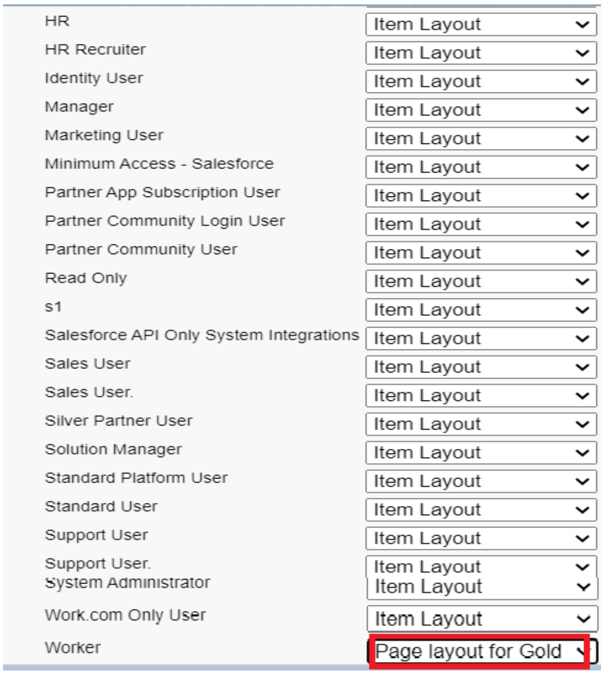


5. Scroll down and check for the Gold Smith, Worker JW & System Administrator profile and click on Next.



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





Activity 2: Create another Record Type with name “Silver” following the steps from Activity1.

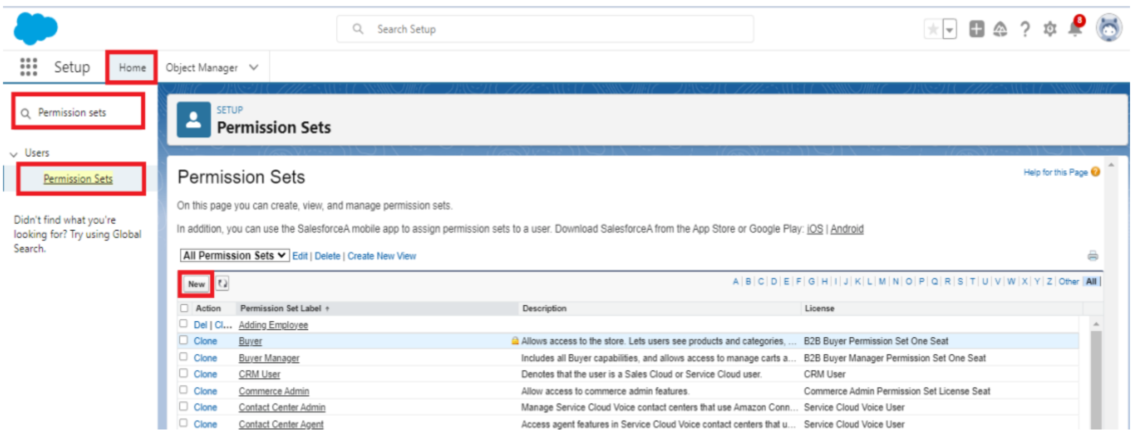
Note: Use page layout for Silver.

Module: Permission sets

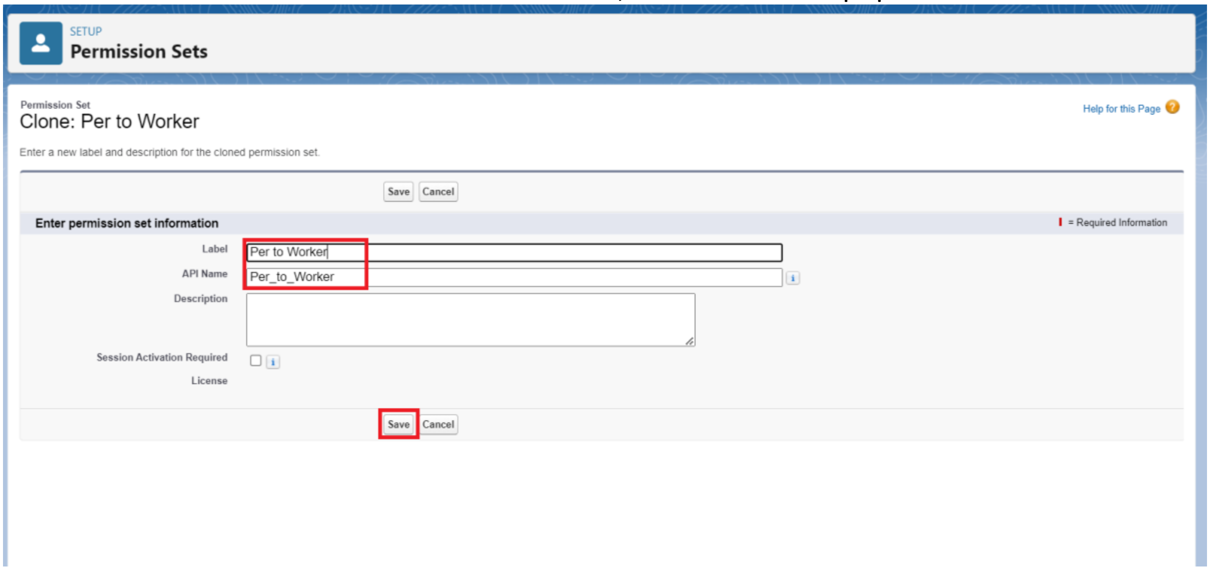
Activity 30: Creating permission set

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

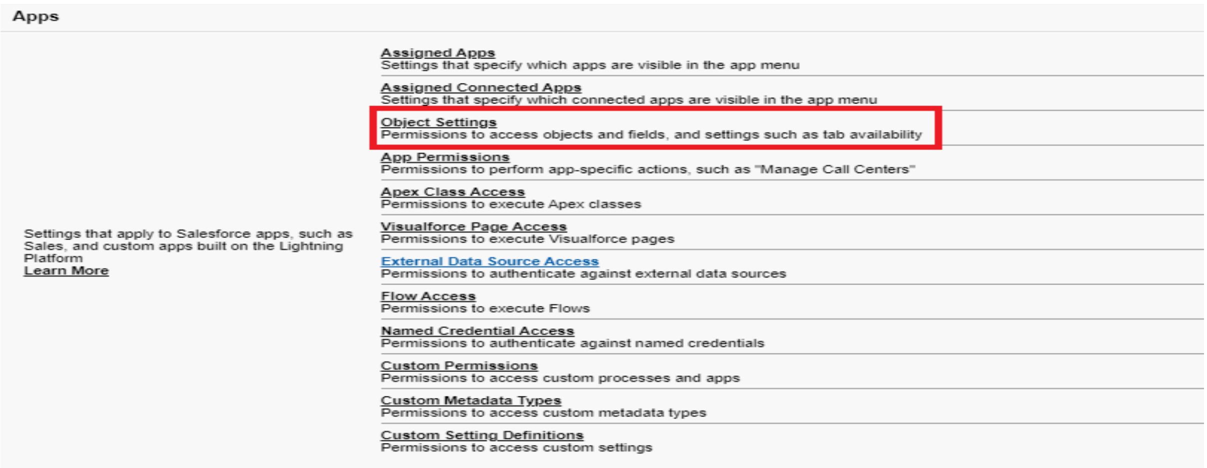
1. Go to setup >> type “permission sets” in quick search >> select permission sets >> New.



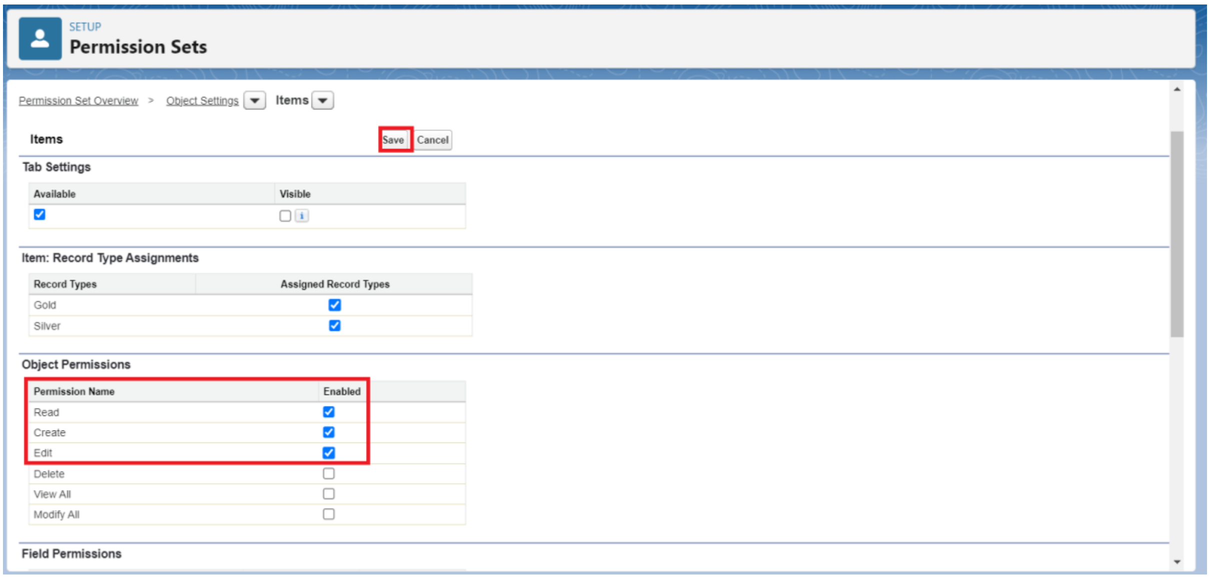
2. Enter the label name as “Per to Worker”, API will be auto populated? save.



3. Under Apps Select object settings.



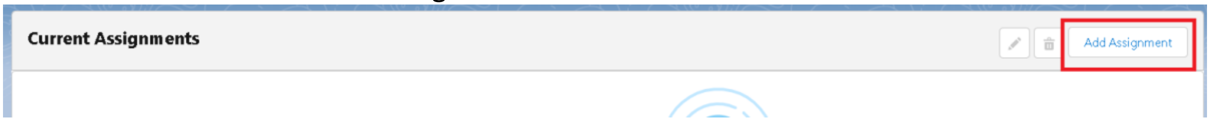
4. Click on Items object? click on Edit? under Item: Record Type Assignments, enable Gold, Silver? Object permission check for read, edit and create.

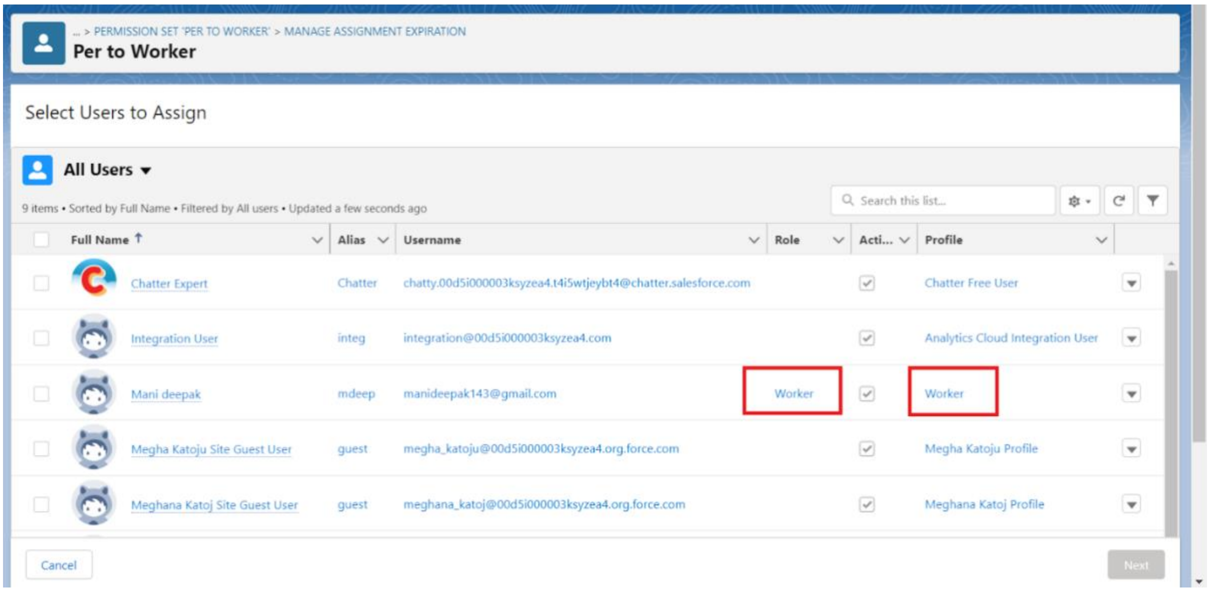


5. Click on Save.

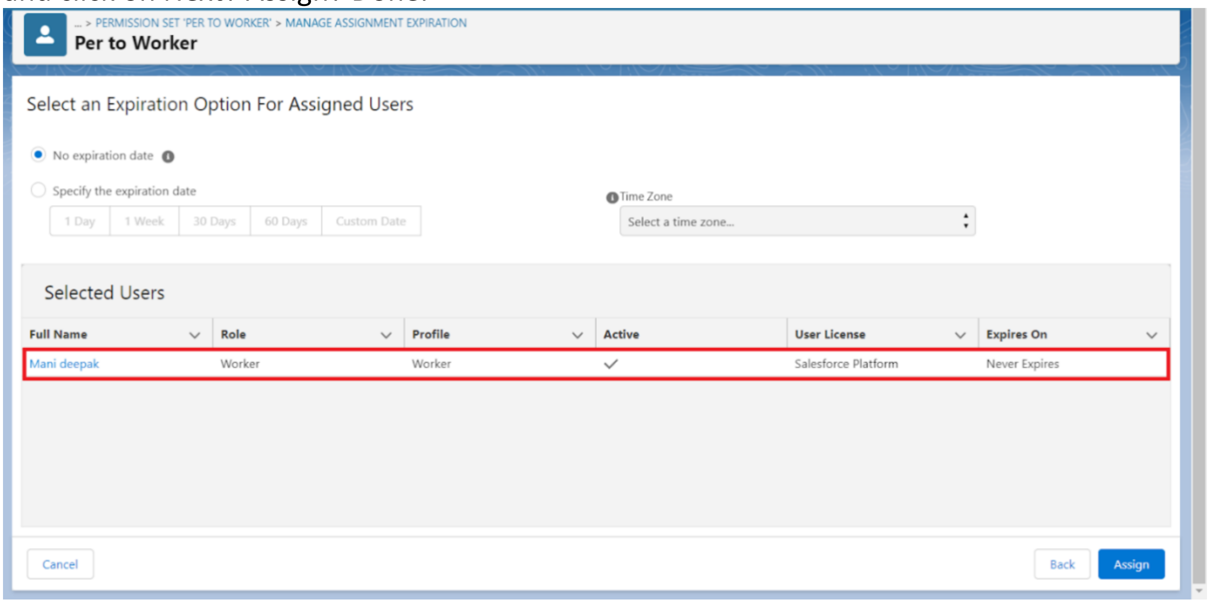
6. After saving the permission click on the Manage assignment

7. Now click on the Add Assignment.





8. Now select the users which you have created in user milestone, using worker profile and click on Next? Assign? Done.



Module: Trigger

Activity 31: Create a Trigger Handler class

Trigger handler:

A trigger handler is a design pattern that organises trigger logic into separate classes. This helps in keeping code organised, reusable, and easier to maintain. The trigger handler class contains methods that handle the specific logic for different trigger events, improving code structure and readability. This approach is particularly useful for complex triggers or projects with multiple triggers, as it promotes modular coding practices and reduces the chances of code duplication.

CODE:

```
public class UpdatePaidAmountTriggerHandler {

    public static void handleBeforeInsert(List<Billing__c> newBillings) {

        for (Billing__c billing : newBillings) {

            billing.Paid_Amount__c = billing.Paying_Amount__c;

        }

    }


    public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap,
List<Billing__c> updatedBillings) {

        for (Billing__c billing : updatedBillings) {

            Billing__c oldBilling = oldBillingsMap.get(billing.Id);

            Decimal oldPaidAmount = oldBilling.Paid_Amount__c;

            billing.Paid_Amount__c = oldPaidAmount + billing.Paying_Amount__c;

        }

    }

}
```

Activity 32: Create the trigger

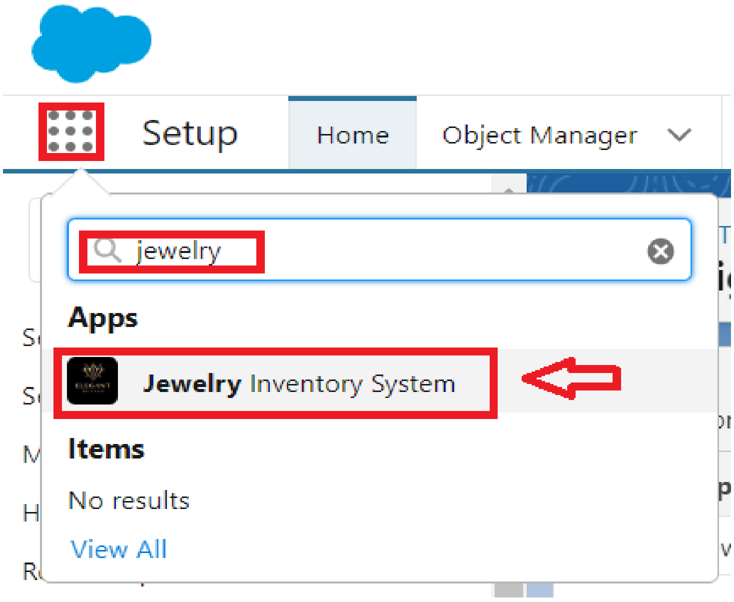
CODE:

```
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);

    }
```

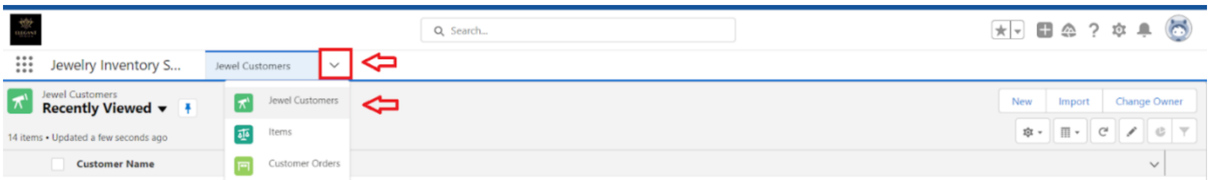
Module: User Adoption

Activity 33: Create a Record (Jewel Customer)

1. Click on App Launcher on the left side of the screen.
2. Search Jewellery Inventory System & click on it.



3. Click on Drop Down and Click on the Jewel Customer tab.
4. Click new.



5. Fill the Details and click on Save.

Activity 34: View a Record (Jewel Customer)

1. Click on App Launcher on the left side of the screen.
2. Search Jewellery Inventory System & click on it.
3. Click on the Jewel Customer Tab.
4. Click on any record name. you can see the details of the Jewel Customer.

Activity 35: Delete a Record (Jewel Customer)

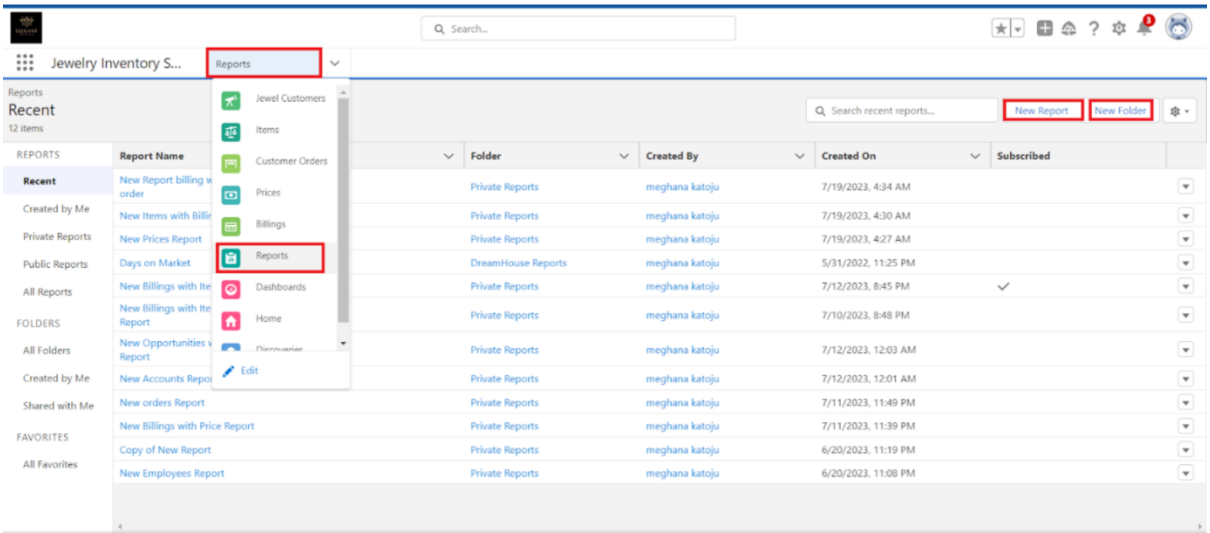
1. Click on App Launcher on the left side of the screen.
2. Search Jewellery Inventory System & click on it.
3. Click on the Jewel Customer Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete.

Note: Create at least 10 records for each of the objects: Jewel Customer, Price, Item, Customer Order and Billing.

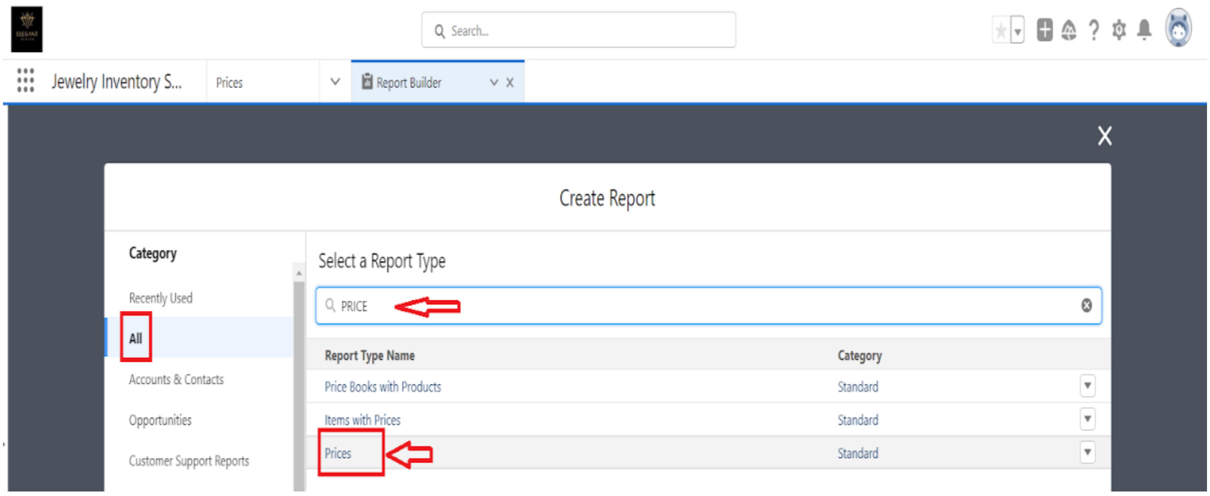
Module: Reports

Activity 36: Create Report

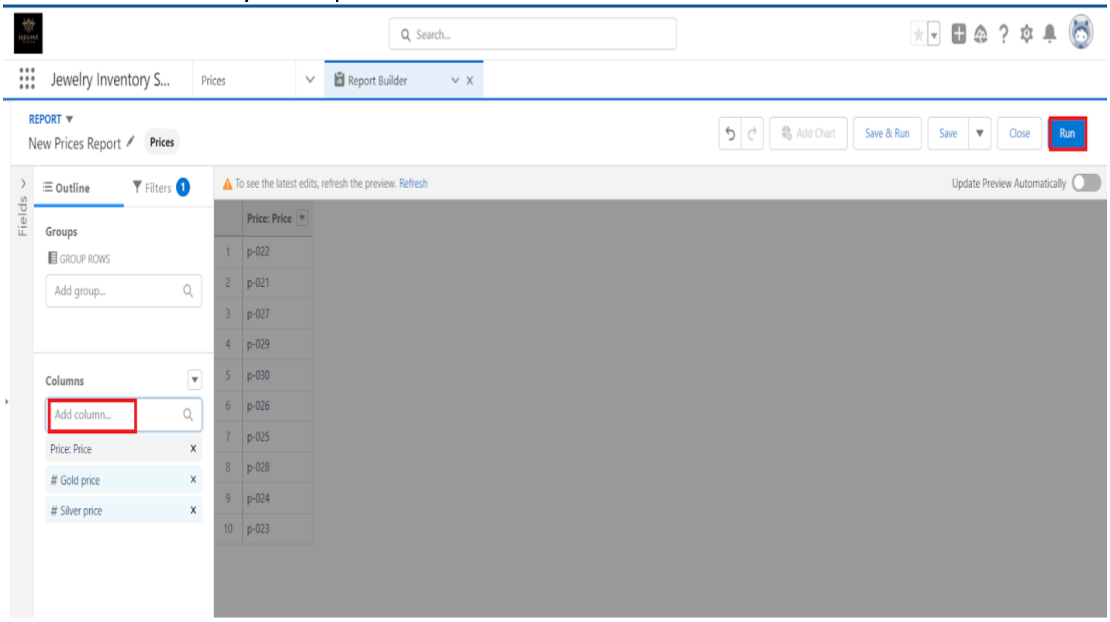
1. Go to the app >> click on the reports tab
2. Click New Report.



3. Select report type from category or from report type panel or from search panel? click on start report.

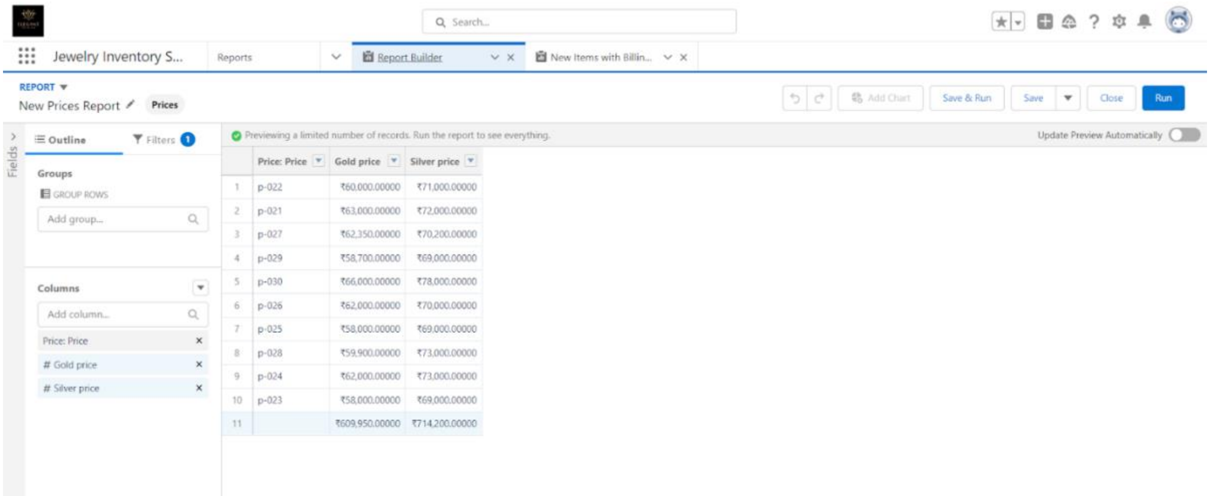


4. Customise your report



- Add fields from the left pane as shown below.

5. Save or run it.



Note: Reports may get varied from the above pictures as the data might be different.

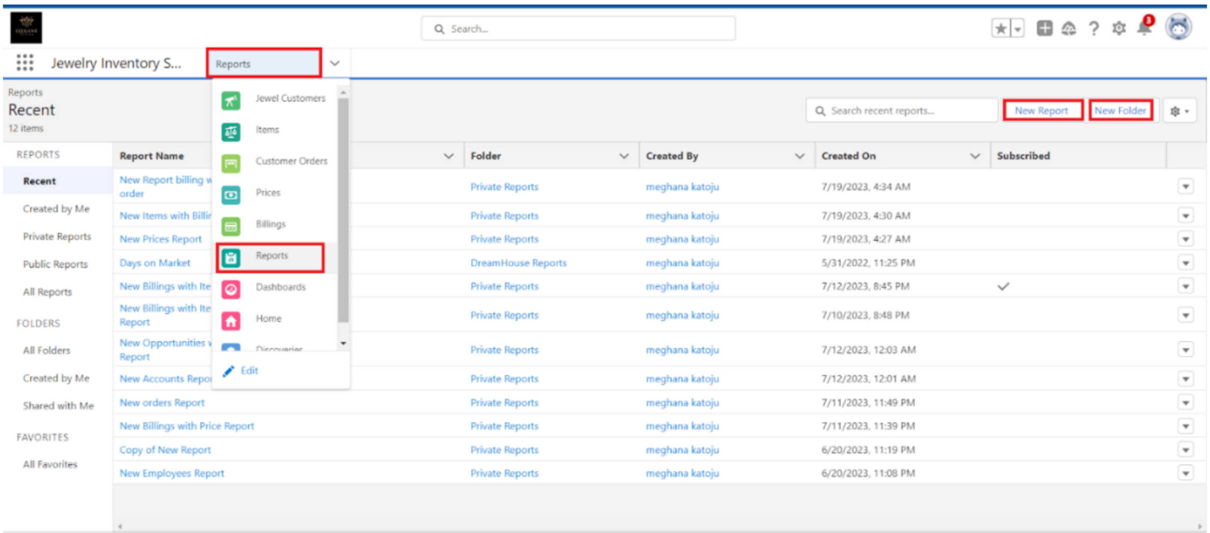
Activity 37: Reports

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

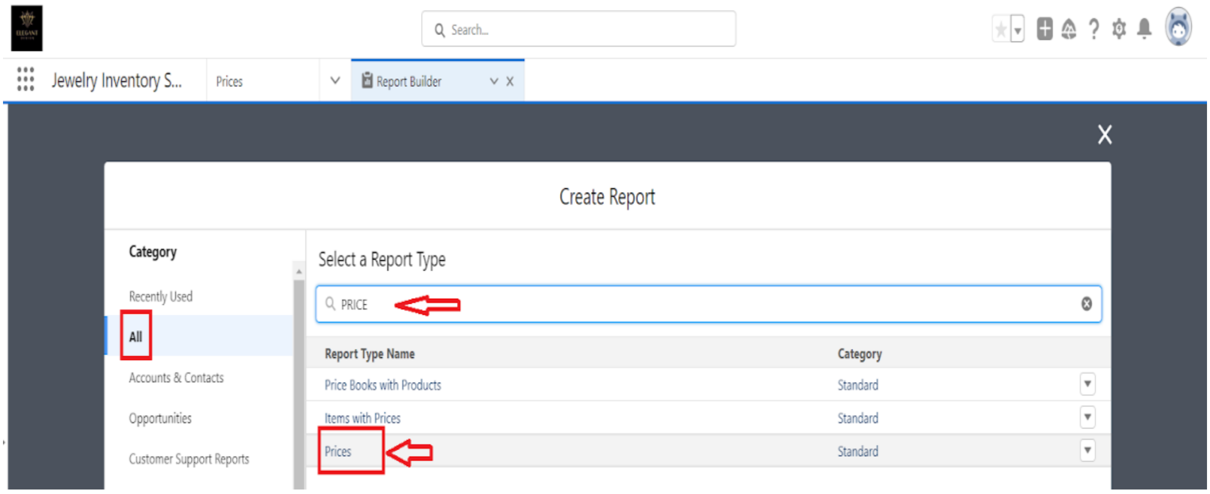
Module: Dashboards

Activity 38: Create Report

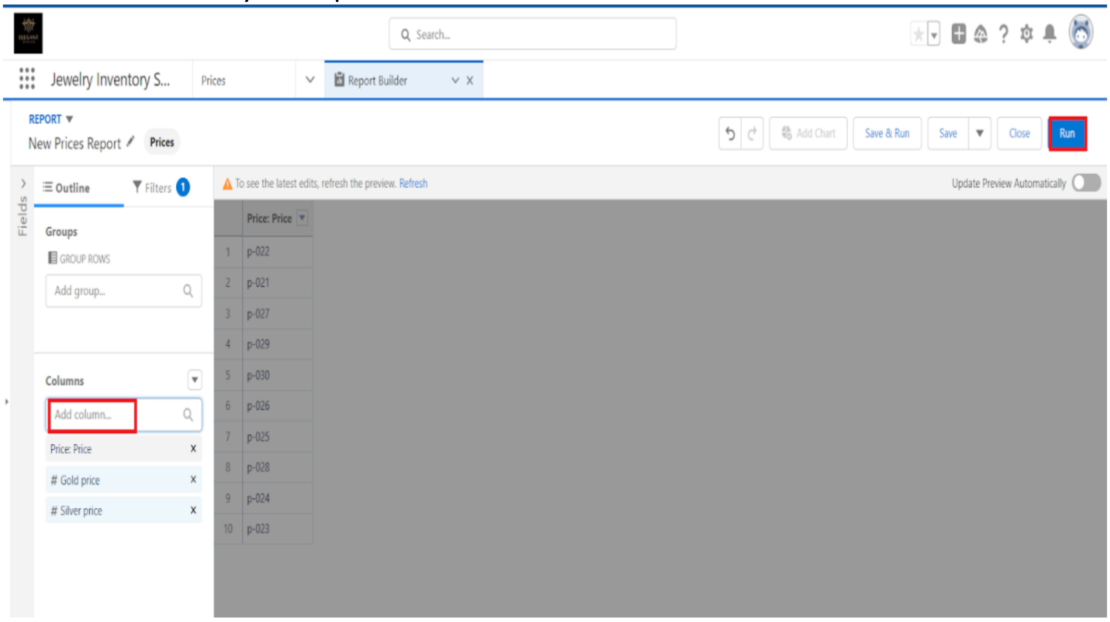
1. Go to the app >> click on the reports tab
2. Click New Report.



3. Select report type from category or from report type panel or from search panel? click on start report.

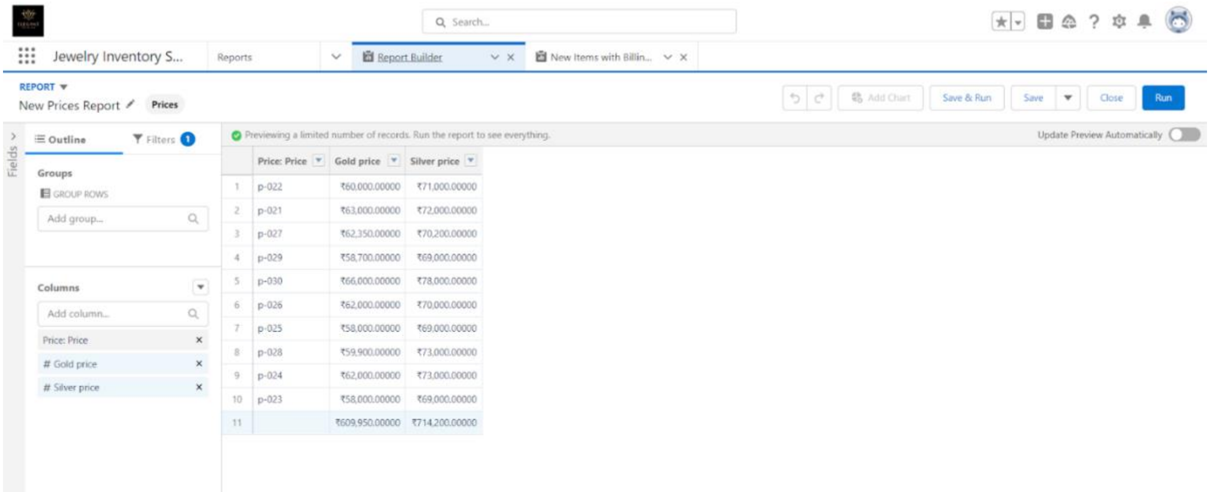


4. Customise your report



- Add fields from the left pane as shown below.

5. Save or run it.

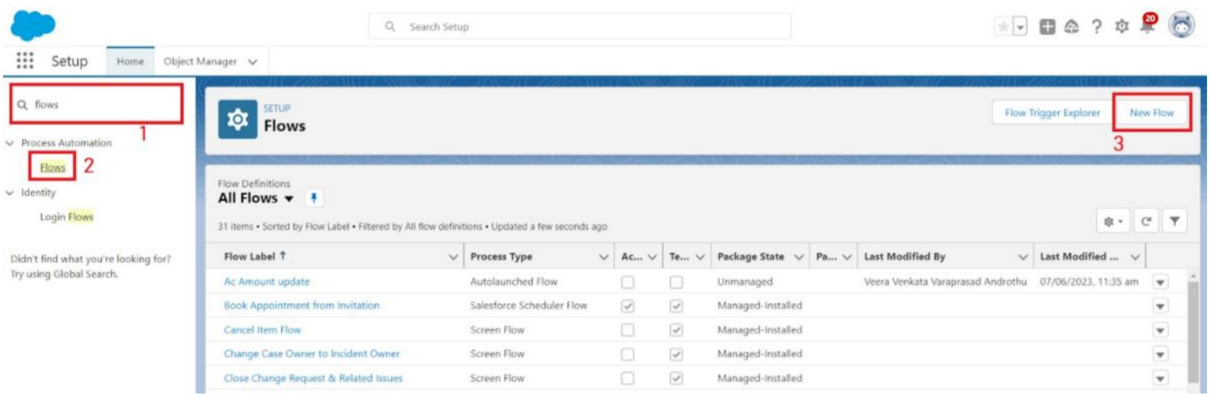


Note: Reports may get varied from the above pictures as the data might be different.

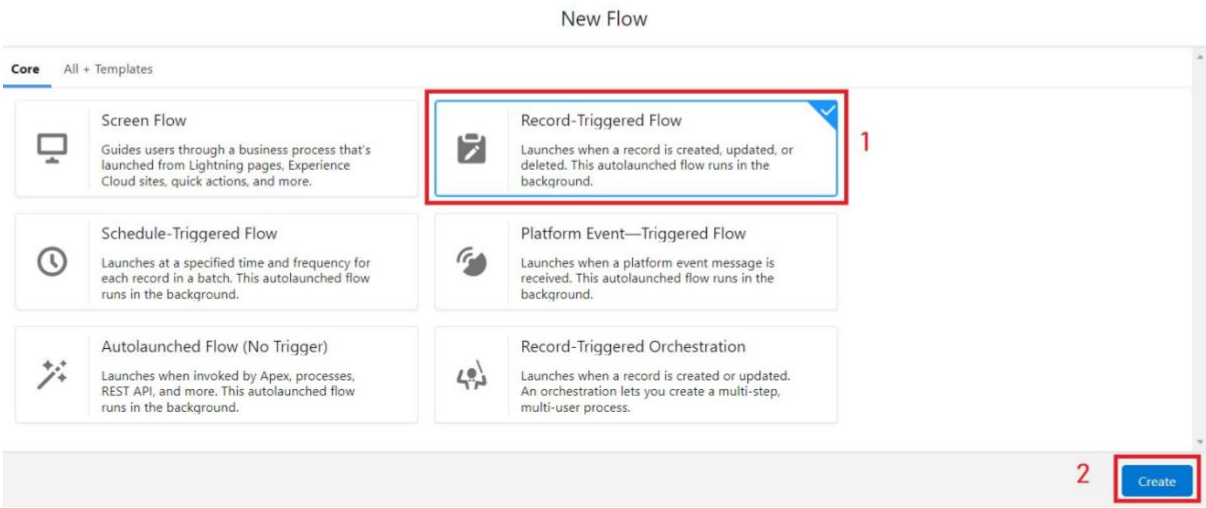
Module: Flows

Activity 39: Create a Flow

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.



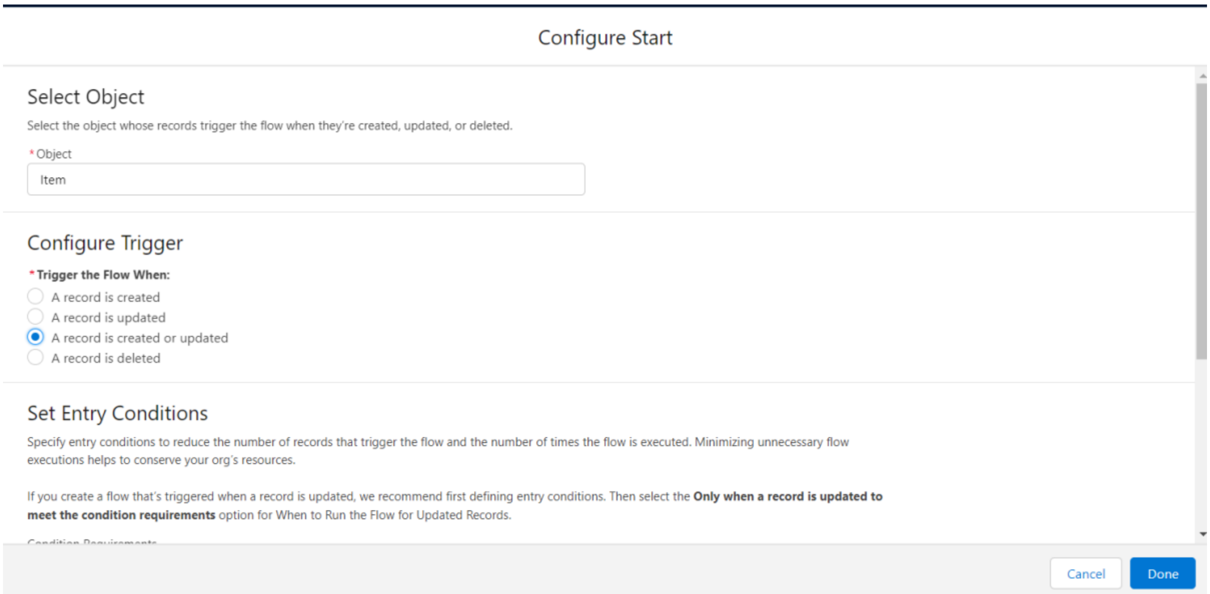
2. Select the Record-triggered flow and Click on Create.



3. Select the Object as a “Billing” in the drop down list.

4. Select the Trigger Flow when: “A record is Created or Updated”.

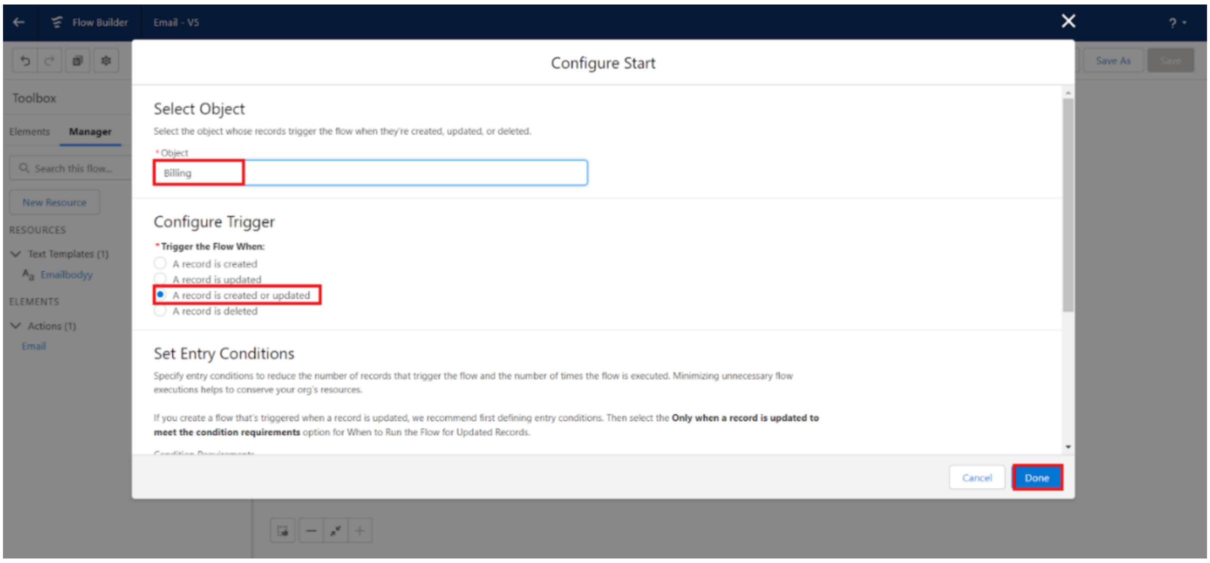
5. Select the Optimise the flow for: “Actions and Related Records” and Click on Done.

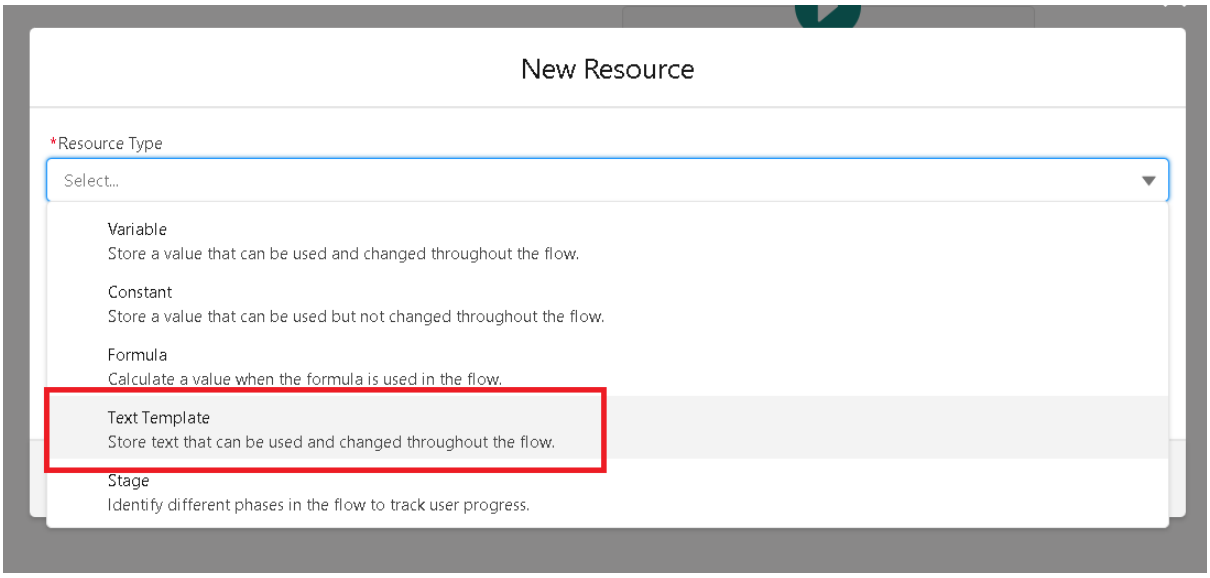


6. Now change the mode form Auto-layout to free-form.

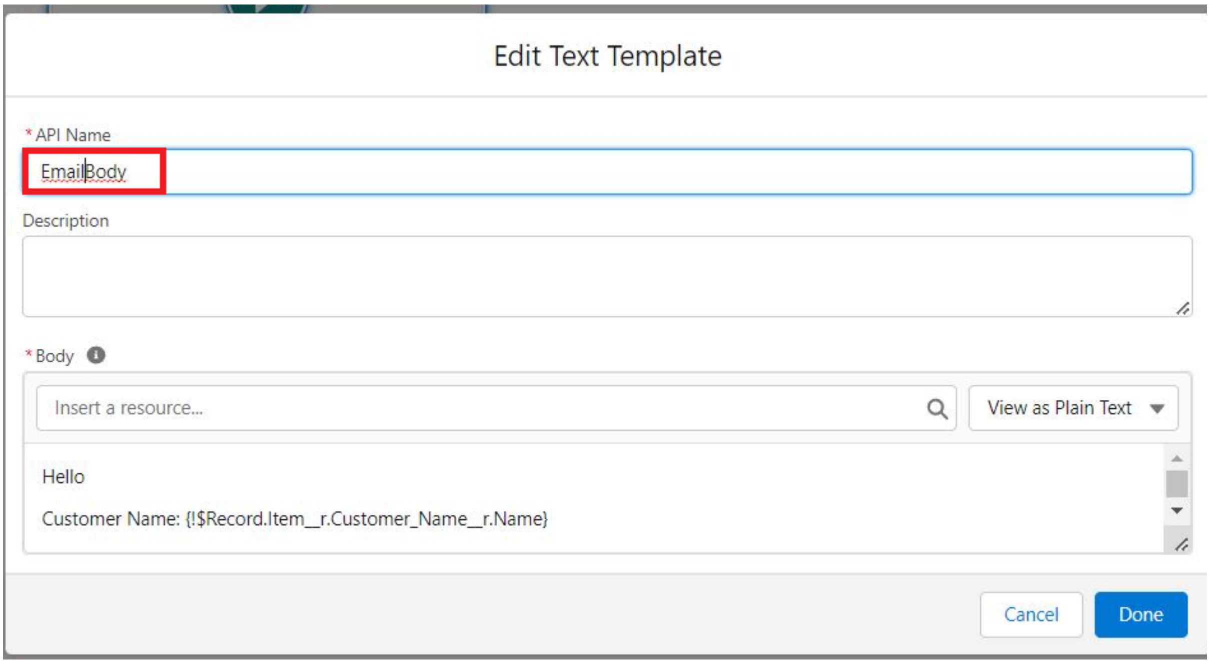
7. Now select the manger option in the toolbox, click new resource.

8. Select the resource type as text template.





9. Enter the API name as “Email body”.



10. Change the view as Rich Text? View to Plain Text.
11. In the body field paste the syntax that is given below.

Hello

Customer Name: {!$Record.Item__r.Customer_Name__r.Name}

Here are the details for the item you purchased with Jewellery Inventory System

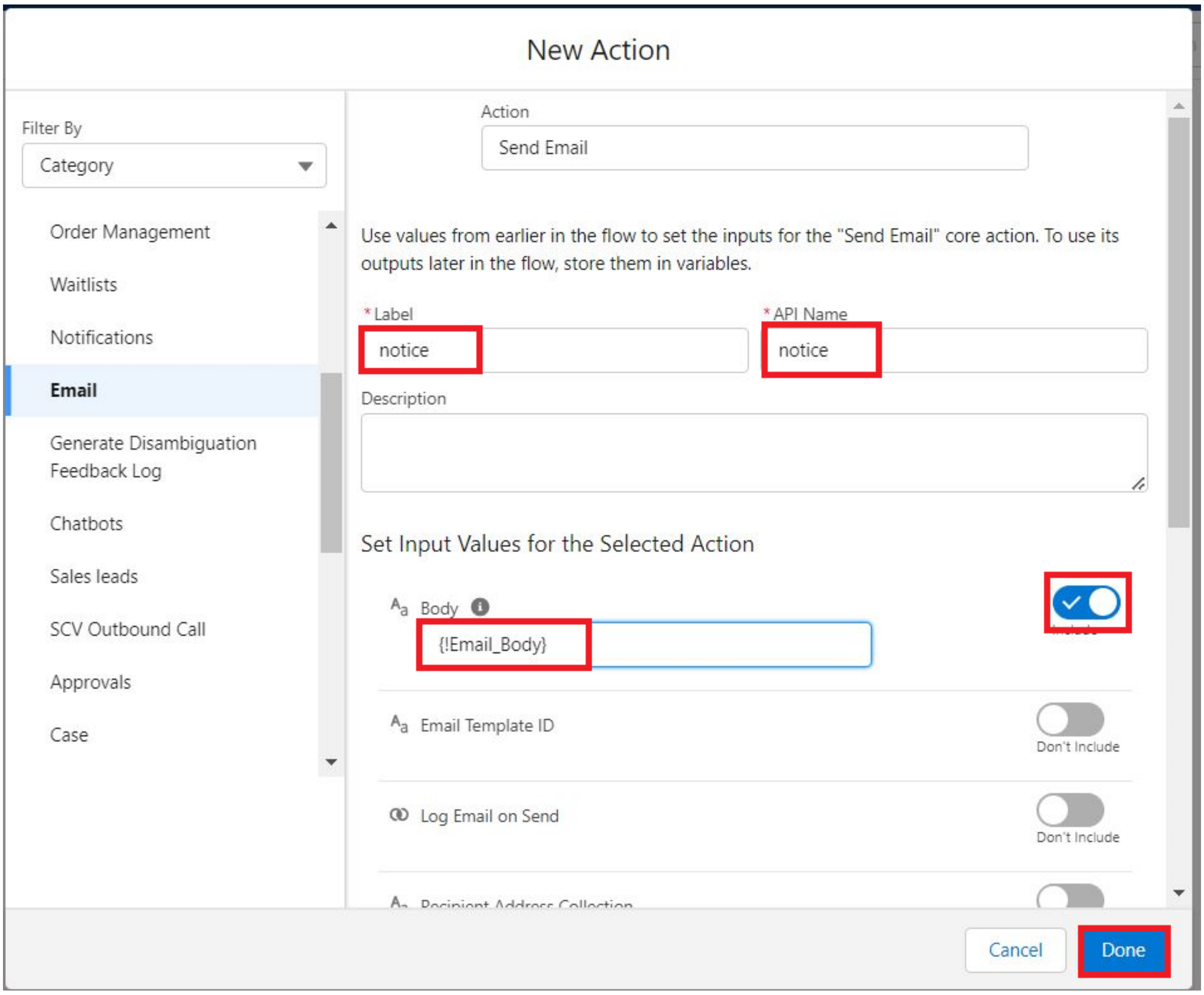
Item Type: {!$Record.Item__r.Item_Type__c}

Ornament: {!$Record.Ornament__c}

Weight: {!$Record.Weight__c}grams

Amount: {!$Record.Amount__c}

12. Click done.
13. Now click on elements, and drag the action element into the preview pane.
14. Their action bar will be opened in that search for “send email” and click on it.
15. Give the label name as “notice”
16. API name will be auto populated.
17. Enable the body in set input values for the selected action.
18. Select the text template that was created.

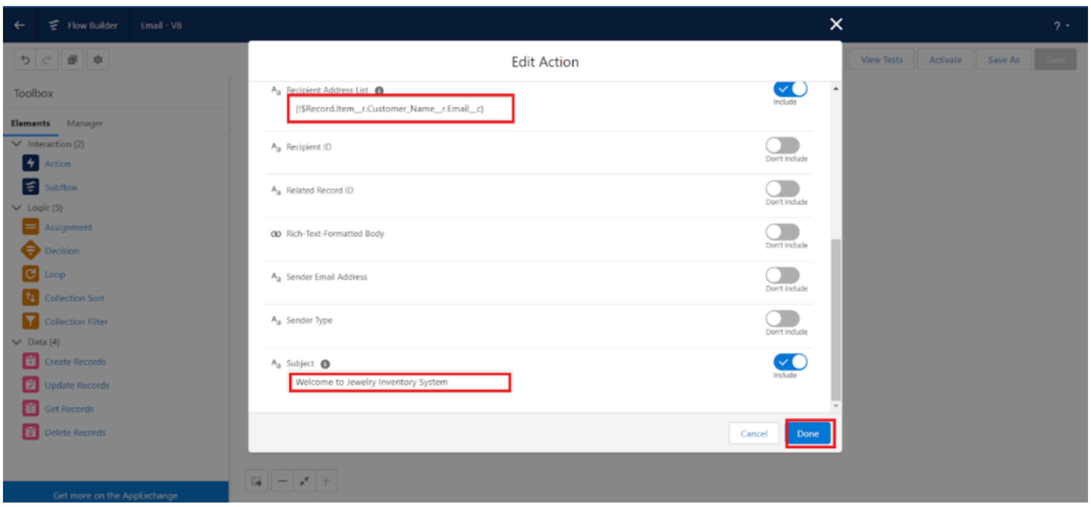


19. Include Recipient Address list, select the email form the record.

({!$Record.Item_r.Customer_Namer.Email_c})

20. Include the subject as “Welcome to Jewellery Inventory System”.

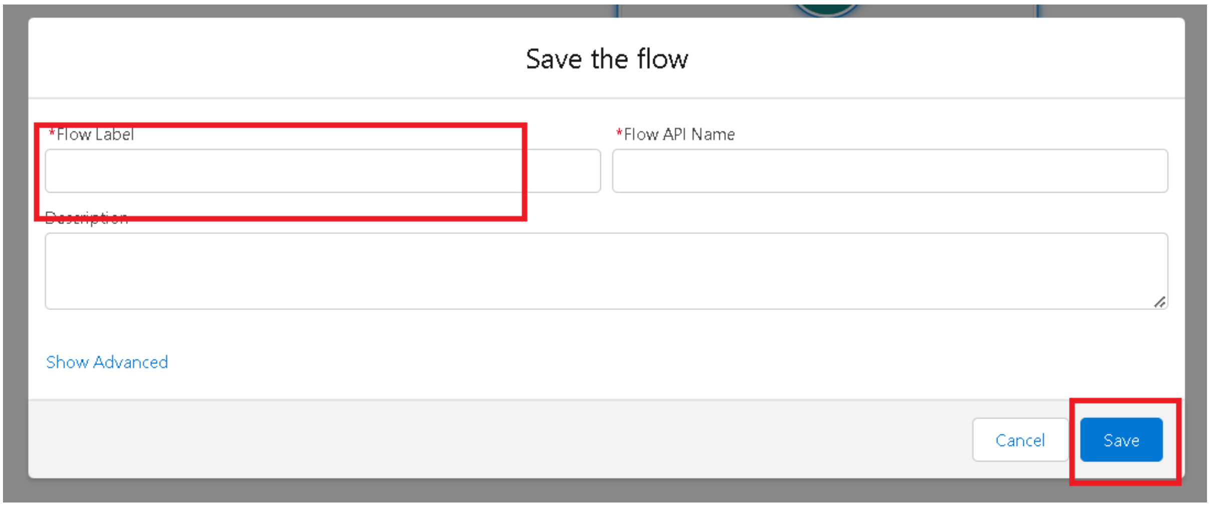
21. Click done.

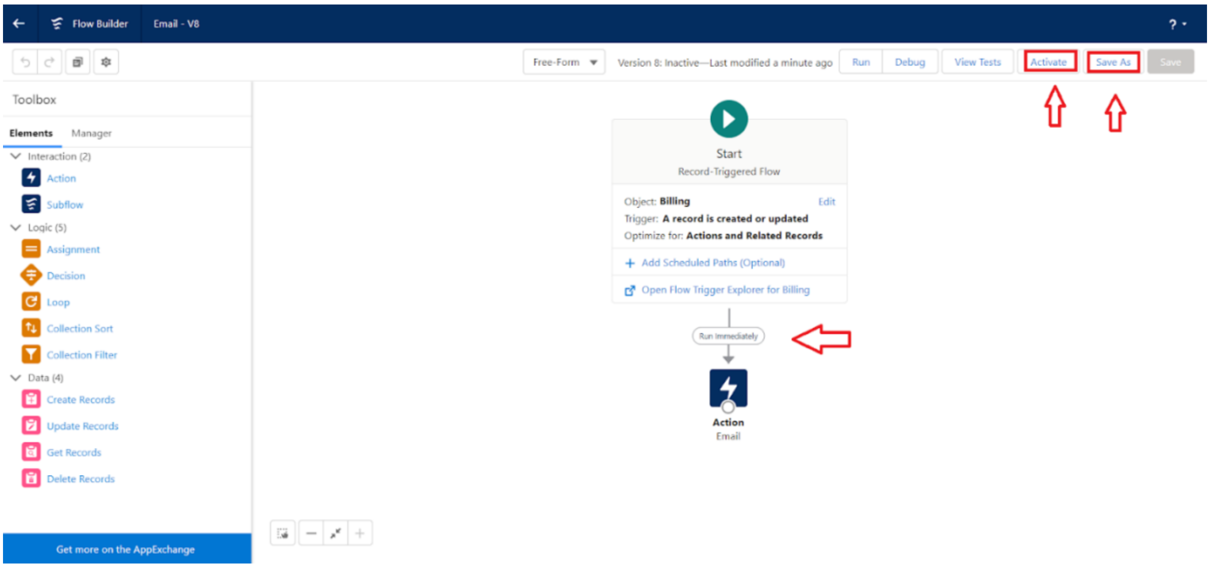


22. Now drag the path from the start to the action element.

23. Click on save. Given the Flow label, Flow Api name will be auto populated.

24. And click save, and click on activate.





Conclusion

The CRM Application for Jewel Management successfully streamlines customer interactions, sales, inventory, and marketing in one integrated platform. It enhances customer experience, boosts operational efficiency, and provides valuable business insights. With a strong foundation now in place, the system is ready to scale and support future growth in a competitive jewellery market.