

# CRM Application for Jewel Management

SRI KRISHNA ADITHYA COLLEGE OF ARTS AND SCIENCE

**TEAM ID:** NM2025TMID22175

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- HARIHARAN B
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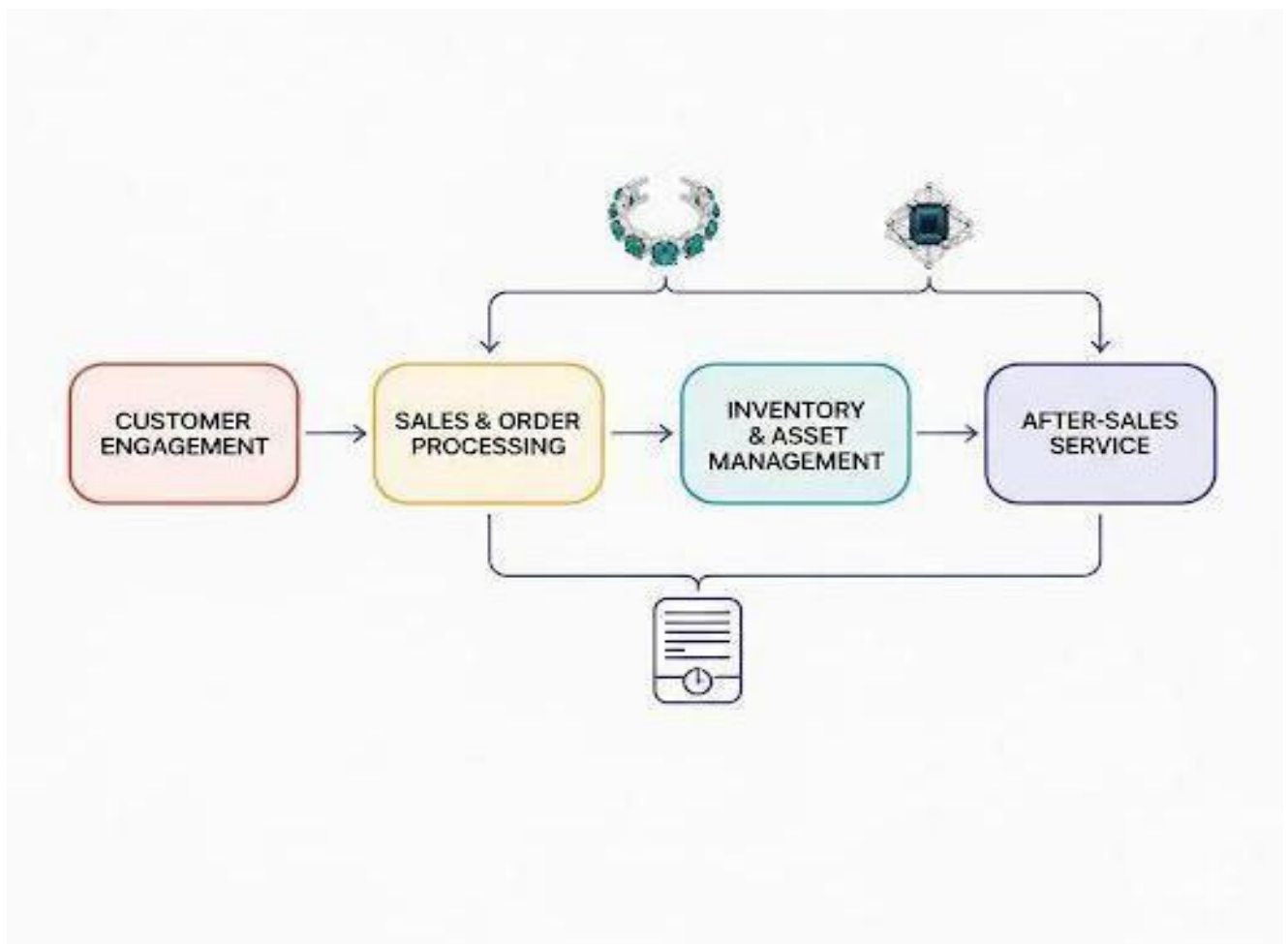
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# 1.INTRODUCTION

## 1.1 Project Overview

The CRM Application for Jewel Management is designed to help jewelry businesses efficiently handle **customer relationships, inventory, and sales** in a single platform. It enables jewelers to manage **customer data, purchase history, product catalog, billing, and order tracking** while also sending personalized offers and reminders.



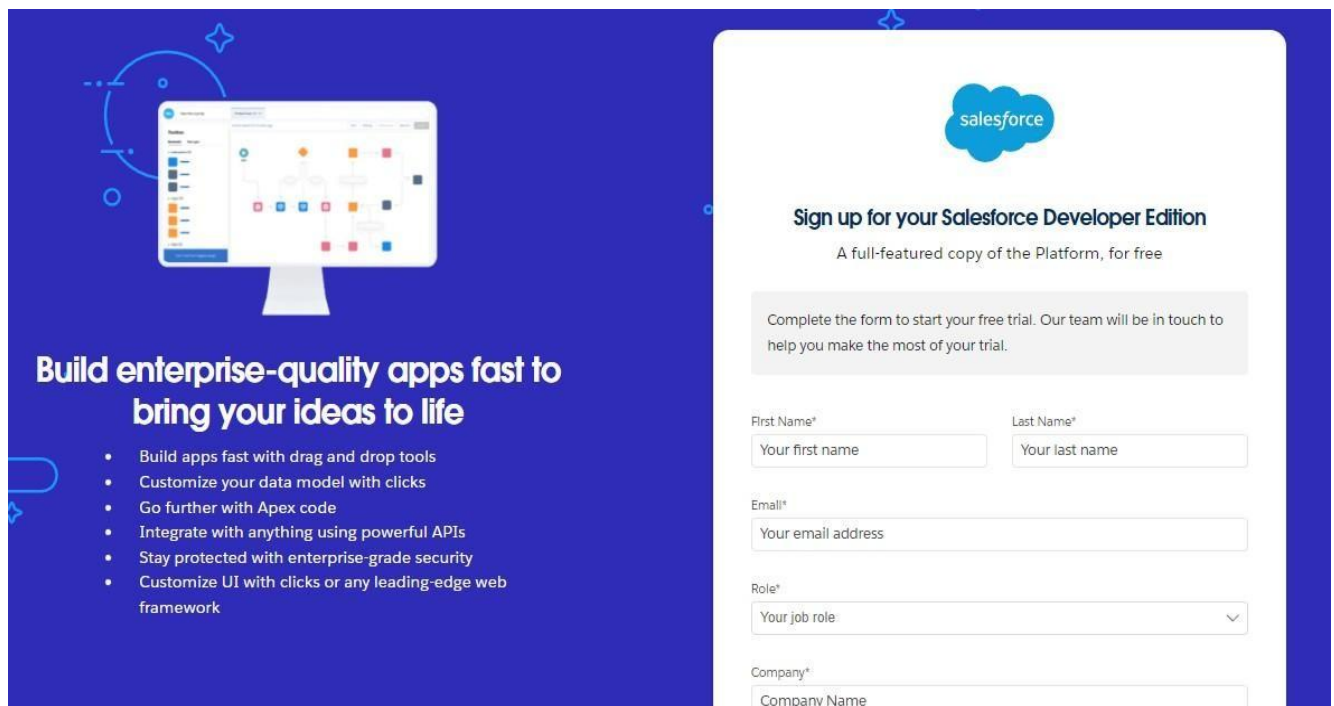
## 1.2 Purpose

The main purpose of the CRM Application for Jewel Management is to streamline jewelry business operations by combining customer management, sales, and inventory in one platform. It helps jewelers track customer details, purchase history, and preferences while managing stock efficiently. The system also automates billing, payments, and order tracking, along with sending reminders and personalized offers. Overall, it improves business efficiency, enhances customer satisfaction, and supports better decision-making through reports and analytics.

## DEVELOPMENT PHASE

### Creating Developer Account

By using this URL - <https://developer.salesforce.com/signup>



**Build enterprise-quality apps fast to bring your ideas to life**

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

**Sign up for your Salesforce Developer Edition**  
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name\*  
Your first name

Last Name\*  
Your last name

Email\*  
Your email address

Role\*  
Your job role

Company\*  
Company Name

**Sign Up**

# Account Activation

Change Your Password

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

- 8 characters
- 1 letter
- 1 number

\* New Password  
..... Good

\* Confirm New Password  
..... Match

Security Question  
In what city were you born?

\* Answer  
asdfghjkl

Change Password

- This will redirect to your salesforce setup page.
- Objects such as Jewel Customer, Item, Customer Order, Price, Billing are created.

Welcome to Salesforce: Reset | - Student | Jewel Customer | Salesforce

orgfarm-24cc71ce16-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gK000002Bgxf/Details/view

Setup | Home | Object Manager

Search Setup

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

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List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Details

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

Edit Delete

Welcome to Salesforce: Reset | Student | Item | Salesforce

orgfarm-24cc71ce16-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002Bh6v/Details/view

Search Setup

Setup Home Object Manager

Item

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Details

Description

API Name  
Item\_\_c

Custom  
✓

Singular Label  
Item

Plural Label  
Items

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

EditDelete

Search Setup

Setup Home Object Manager

Setup Home Object Manager

Customer Order

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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








EditDelete

Search Setup

Setup Home Object Manager



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

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Details

EditDelete

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



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Billing

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Details

EditDelete

Description

API Name

Billing\_\_c

Custom

✓

Singular Label

Billing

Plural Label

Billings

Enable Reports

✓

Track Activities

Track Field History

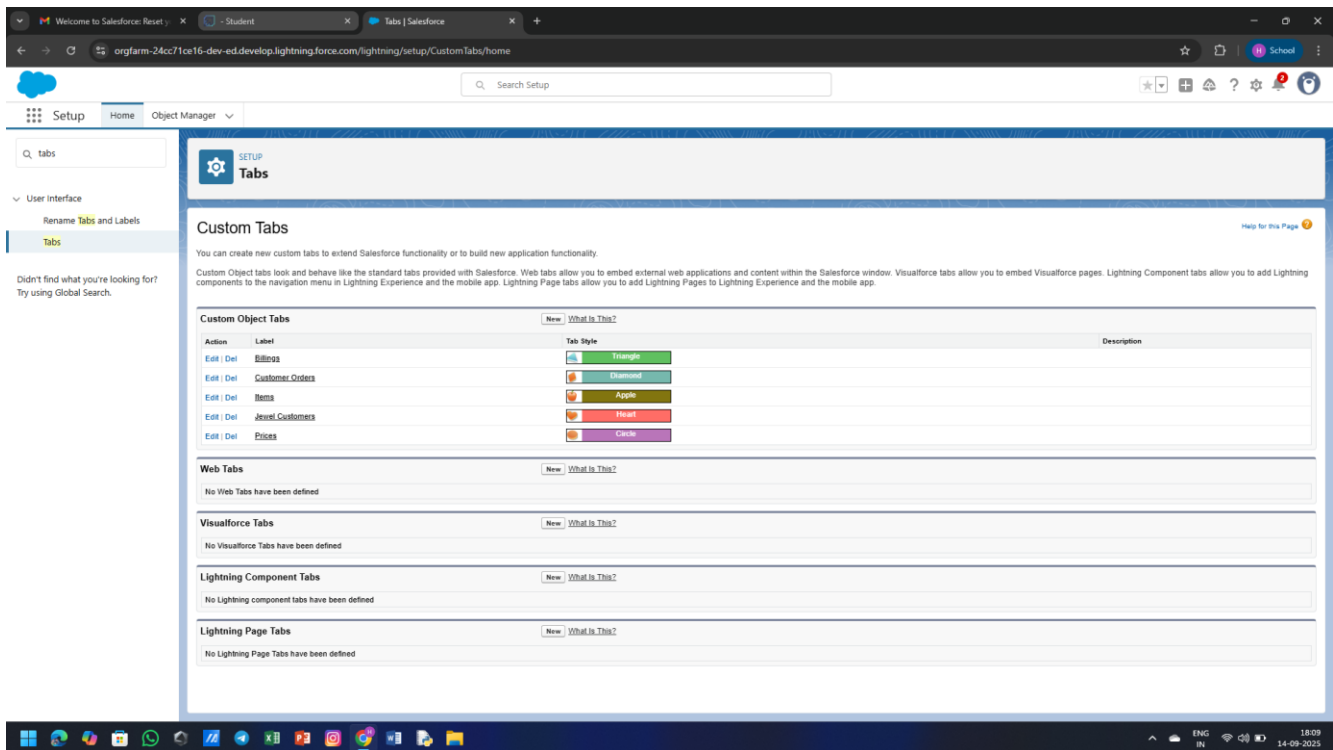
Deployment Status

Deployed

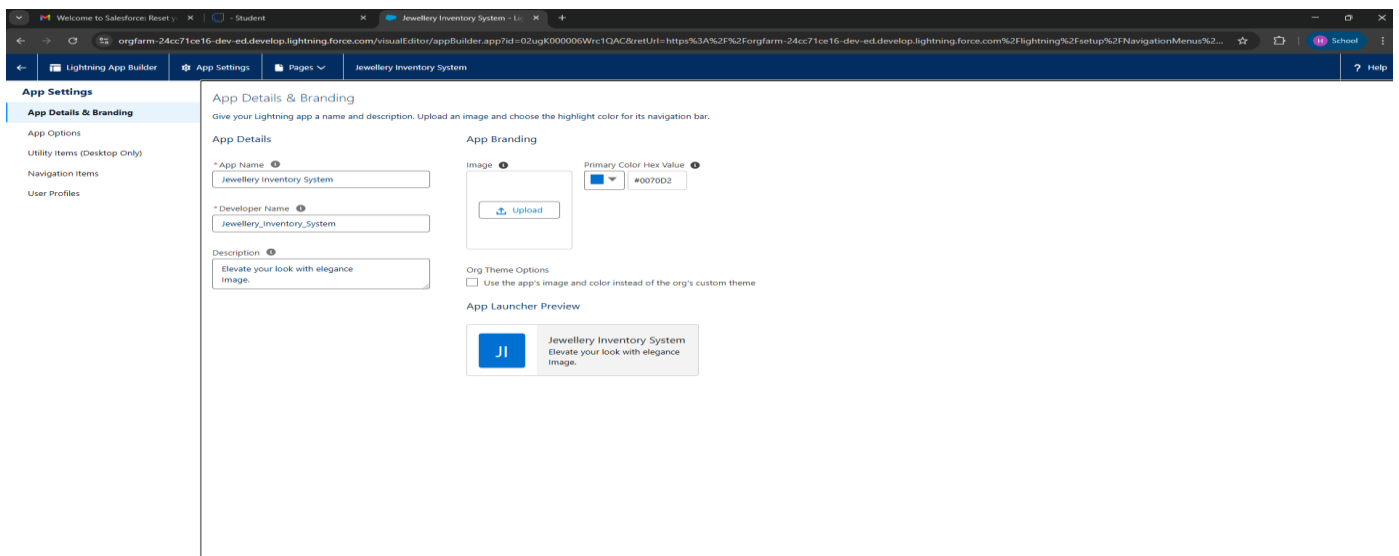
Help Settings

Standard salesforce.com Help Window

- Custom Tab for Jewel Customer ,Item, Customer Order, Price, Billing objects are created.



- Lightning App is been developed with the name “Jewellery Inventory System”.



Lightning Experience App Manager

27 items • Sorted by App Name • Filtered by All appmenutems • TabSet Type: App Type

App Name	Developer Name	Description	Last Modified Date	App Type	Visible in Lightning Experience
Automation	FlowsApp	Automate business processes and repetitive tasks.	9/9/2025, 1:21 PM	Lightning	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	9/9/2025, 1:16 PM	Lightning	✓
Community	Community	Salesforce CRM Communities	9/9/2025, 1:16 PM	Classic	✓
Content	Content	Salesforce CRM Content	9/9/2025, 1:16 PM	Classic	✓
Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	9/9/2025, 1:16 PM	Lightning	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	9/9/2025, 1:16 PM	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	9/9/2025, 1:16 PM	Lightning	✓
Jewellery Inventory System	Jewellery_inventory_system	Elevate your look with elegance image.	9/12/2025, 1:46 AM	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	9/9/2025, 1:16 PM	Lightning	✓
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	9/9/2025, 1:16 PM	Classic	✓
My Service Journey	MSIApp	Discover new customer service capabilities.	9/9/2025, 1:16 PM	Lightning	✓
Platform	Platform	The fundamental Lightning Platform	9/9/2025, 1:16 PM	Classic	✓
Queue Management	QueueManagement	Create and manage queues for your business.	9/9/2025, 1:16 PM	Lightning	✓
Sales	Sales	The world's most popular sales force automation (SFA) solution	9/9/2025, 1:16 PM	Classic	✓
Sales Console	LightningSalesConsole	Manage your sales process with accounts, leads, opportunities, and more	9/9/2025, 1:16 PM	Lightning	✓
Sales Cloud Mobile	SalesCloudMobile	New seller focused mobile first experience	9/9/2025, 1:16 PM	Lightning	✓
Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	9/9/2025, 1:16 PM	Lightning	✓
Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	9/9/2025, 1:16 PM	Classic	✓
Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	9/9/2025, 1:19 PM	Lightning	✓
Service	Service	Manage customer service with accounts, contacts, cases, and more	9/9/2025, 1:16 PM	Classic	✓

- Creating fields such as Customer, Item in the Customer Order

Customer Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

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Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Customer Order Custom Field

Customer

Back to Customer Order

Validation Rules Help

Custom Field Definition Detail

Edit | Set Field-Level Security | View Field Accessibility | Where is this used?

Field Information

Field Label	Customer	Object Name	Customer Order
Field Name	Customer	Data Type	Lookup
API Name	Customer__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Harish A.	Modified By	Harish A.
	9/12/2025, 1:49 AM		9/12/2025, 1:49 AM

Lookup Options

Related To	Related List Label	Child Relationship Name
Jewel Customer	Customer Orders	Customer_Orders

What to do if the lookup record is deleted?

Clear the value of this field.

Lookup Filter

No lookup filters defined.

Validation Rules

New

Validation Rules Help

No validation rules defined.

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Always show me more records per related list



Customer Order

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Flow Triggers

Validation Rules

Conditional Field Formatting

Customer Order Custom Field

Item

Back to Customer Order

Validation Rules (0)

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Item	Object Name	Customer Order
Field Name	Item	Data Type	Master-Detail
API Name	Item__c		
Description			
Help Text			

Field Chatter

Customer Order Custom Field Item - Salesforce - Developer Edition

Data Sensitivity Level

Compliance Categorization

Created By Harish A. 9/12/2025, 1:51 AM

Modified By Harish A. 9/12/2025, 1:51 AM

Master-Detail Options

Related To	Item	Child Relationship Name	Customer Orders
Related List Label	Customer Orders		
Sharing Setting	Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		
Replicable Master Detail	<input type="checkbox"/>		

Lookup Filter

No lookup filters defined.

Validation Rules

New

Validation Rules Help

No validation rules defined.

Back To Top

Always show me more records per related list

- Creating fields such as City, Phone, Email, Purity in Jewel Customer Object.

Jewel Customer

Details

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Conditional Field Formatting

Fields & Relationships

11 Items, Sorted by Field Label

Q, 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(6)		

orgfarm-24cc71ce16-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002Bh6v/FieldsAndRelationships/view

Setup Home Object Manager

Item

Details 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
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)		
Owner	OwnerId	Lookup(User,Group)	✓	
Percentage	Percentage__c	Number(2, 0)		
Prices	Prices__c	Lookup(Price)	✓	
Priority	Priority__c	Picklist		
Purity	Purity__c	Number(2, 0)		
Purity Gold Price	Purity_Gold_Price__c	Formula (Currency)		
Record Type	RecordTypeId	Record Type	✓	
Silver Price	Silver_Price__c	Formula (Number)		

## • Creating Picklist Field in the Item Object

orgfarm-24cc71ce16-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002BINx/FieldsAndRelationships/view

Setup Home Object Manager

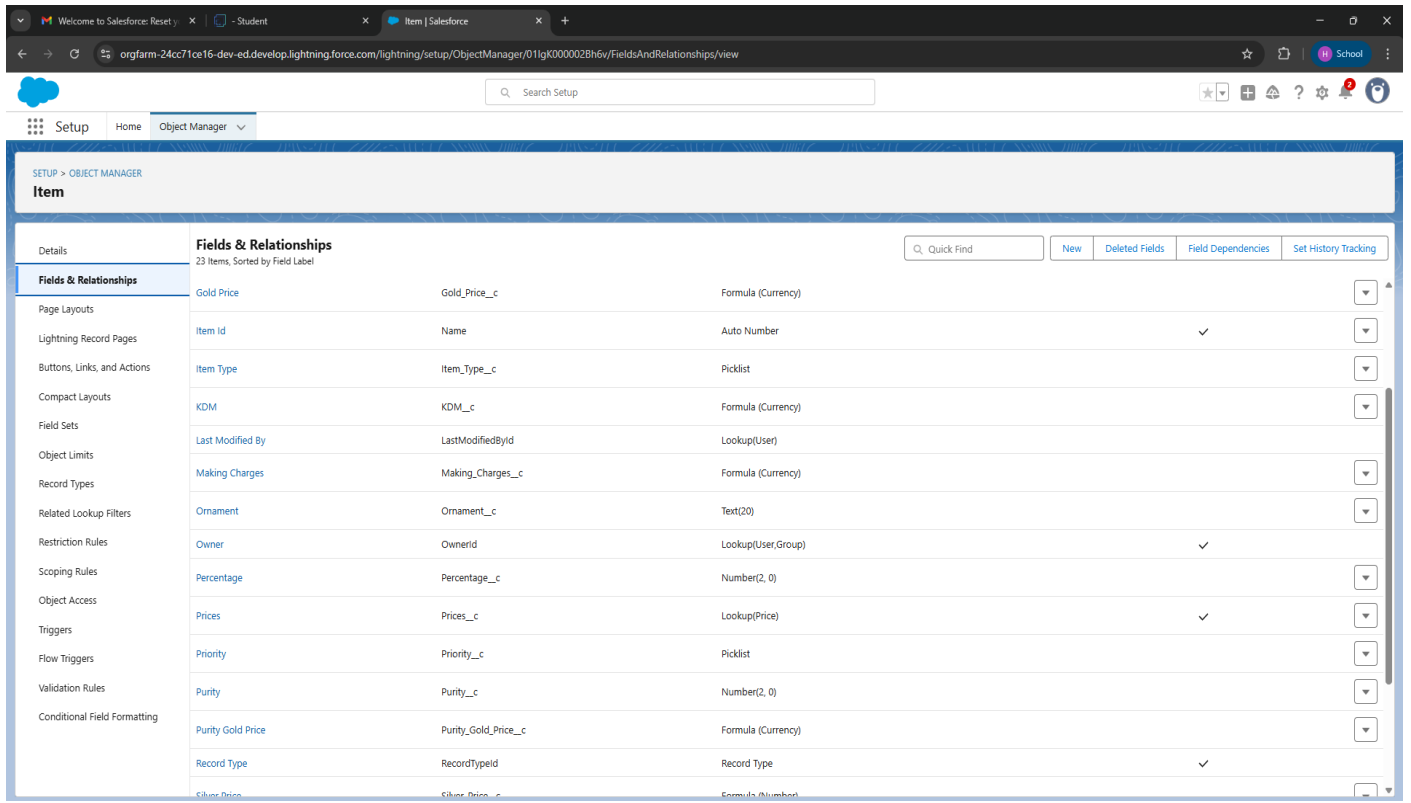
Price

Details 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)		
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)		

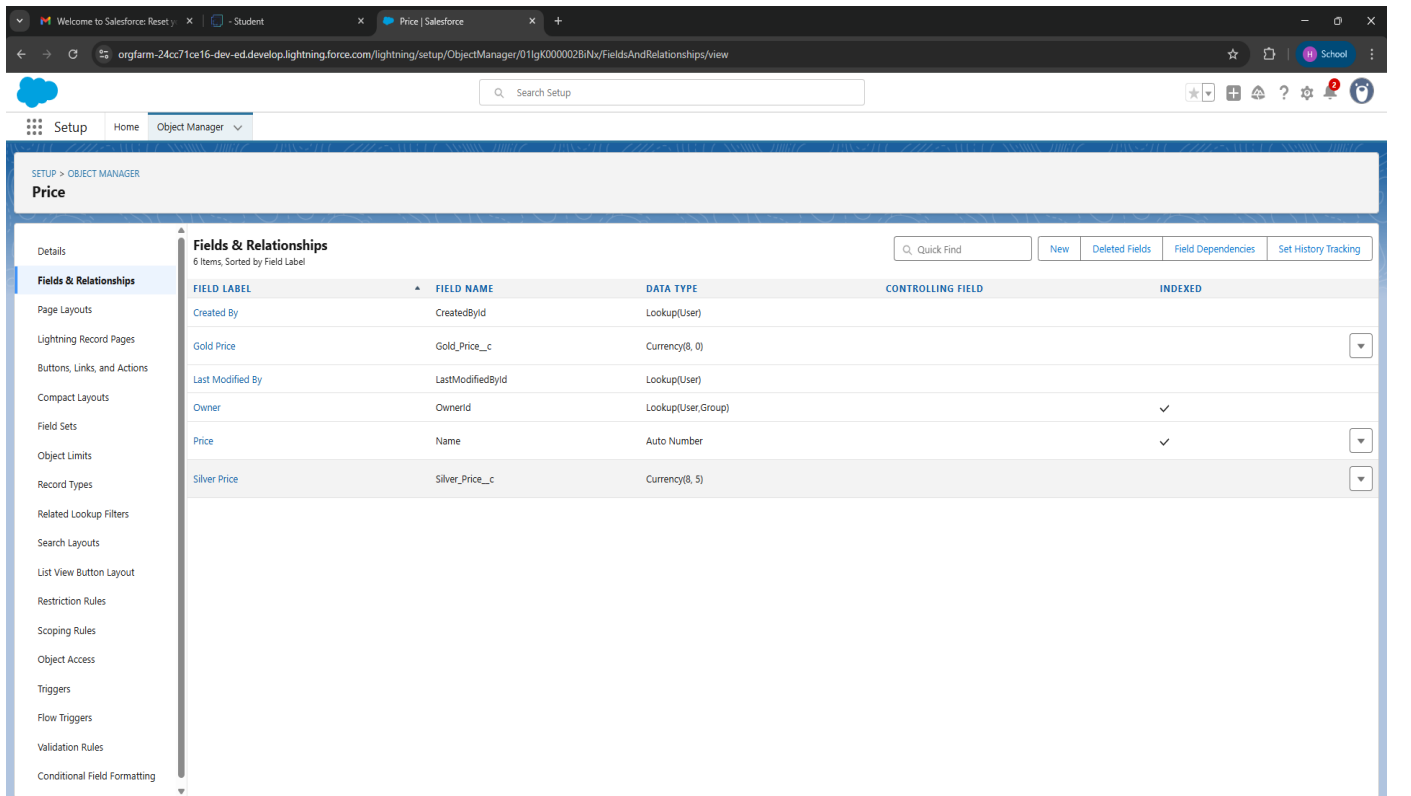
- Creating Field Dependencies.



The screenshot shows the Salesforce Setup interface for the 'Item' object. The 'Fields & Relationships' tab is selected, displaying a list of 23 fields. The fields are sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields are as follows:

Field Label	Field Name	Data Type	Controlling Field	Indexed
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)		
Owner	OwnerId	Lookup(User,Group)	✓	
Percentage	Percentage__c	Number(2, 0)		
Prices	Prices__c	Lookup(Price)	✓	
Priority	Priority__c	Picklist		
Purity	Purity__c	Number(2, 0)		
Purity Gold Price	Purity_Gold_Price__c	Formula (Currency)		
Record Type	RecordTypeId	Record Type	✓	
Silver Price	Silver_Price__c	Formula (Number)		

- Creating validation rule for Jewel Customer object and for Item object.



The screenshot shows the Salesforce Setup interface for the 'Price' object. The 'Fields & Relationships' tab is selected, displaying a list of 6 fields. The fields are sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields are as follows:

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)		

Welcome to Salesforce: Reset y x Student x Item | Salesforce x +

orgfarm-24cc71ce16-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gK000002Bh6v/FieldsAndRelationships/00NgK00001kVbm/view

Search Setup

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SETUP > OBJECT MANAGER

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Validation Rules

Conditional Field Formatting

Item Custom Field  
Gold Price  
Back to Item

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Gold Price	Object Name	Item
Field Name	Gold_Price		
API Name	Gold_Price__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Harish A.	Modified By	Harish A.
	9/13/2025, 6:42 AM		9/13/2025, 6:42 AM

Formula Options

Data Type	Formula
Decimal Places	2

Prices\_\_Gold\_Price\_\_c / 10

- Creating Gold smith profile and Worker profile.

Welcome to Salesforce: Reset y x Student x Home | Salesforce x +

orgfarm-24cc71ce16-dev-ed.develop.lightning.force.com/lightning/setup/null/page?address=%2Fp%2Fdependency%2FeditDependencyUI%2Fe%3FtableEnumOrId%3D01gK000002Bh6v%26controller%3D00NgK00001kUBp5%26dependent%3D0...

Search Setup

Setup Home Object Manager

Q app manager

Apps

App Manager

External Client Apps

External Client App Manager

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

SETUP

Edit Field Dependency

Save Cancel Preview

Controlling Field Priority

Dependent Field Expected Days Of Return

Instructions

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells.
- Double click on a cell to include its value in the dependent picklist.
- Use the Preview button to test the results.

Legend

Excluded Value

Included Value

Click button to include or exclude selected values from the dependent picklist:

Include Values Exclude Values

Priority:	Low	Medium	High	Critical
Expected Days Of Return:	1-3 Days	1-3 Days	1-3 Days	1-3 Days
	4-5 Days	4-5 Days	4-5 Days	4-5 Days
	6-7 Days	6-7 Days	6-7 Days	6-7 Days
	8-10 Days	8-10 Days	8-10 Days	8-10 Days

Showing Columns: 1 - 4 (of 4) < Previous | Next > View All Go to

Click button to include or exclude selected values from the dependent picklist:

Include Values Exclude Values

Save Cancel Preview

- Creating Role as Gold Smith and Worker.

The screenshot shows the Salesforce Setup interface for the 'Roles' section. The left sidebar contains a search bar with 'roles' and a navigation menu with 'Users', 'Roles', 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main content area is titled 'Roles' and 'Creating the Role Hierarchy'. It displays a tree view of the organization's role hierarchy for 'Sri Krishna Adithya College of Arts and Science'. The hierarchy includes roles like CEO, CFO, COO, Gold Smith, Worker, SVP, Customer Service & Support, and Customer Support, International. Each role has an 'Add Role' link next to it.

- Creating users as Niklaus Mikaelson, Kol Mikaelson and other profiles.

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'profile' and a navigation menu with 'Users' and 'Profiles'. The main content area is titled 'Profiles' and shows a list of profiles. The list has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. Two profiles are listed: 'Work.com Only User' and 'Worker Profile'. The 'Worker Profile' is selected, and its 'Custom' checkbox is checked.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Work.com Only User	Work.com Only	<input type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Worker Profile	Salesforce Platform	<input checked="" type="checkbox"/>

Setup Home Object Manager

Search Setup

user

Users

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

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

View: All Users Edit Create New View

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d9000008wjiuai.pdkrmuyoeq2@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIE	epic.8b450cefc383@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Khan_Raj	khanraj	sd@div.dharsh	Worker	✓	Worker Profile
<input type="checkbox"/> Edit	Mikaelson_Koi	kmika	mikko@org.com	Worker	✓	Worker Profile
<input type="checkbox"/> Edit	Mikaelson_Niklaus	nmika	niklau@org.com	Gold Smith	✓	Gold Smith
<input type="checkbox"/> Edit	S_DIVYADHARSNNY	23b	23bcs211divyadharsnmys574@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00d9000008wjiuai.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d9000008wjiuai.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

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

Creating Page Layout for Gold and Silver.

Welcome to Salesforce Setup

Setup Home Object Manager

Search Setup

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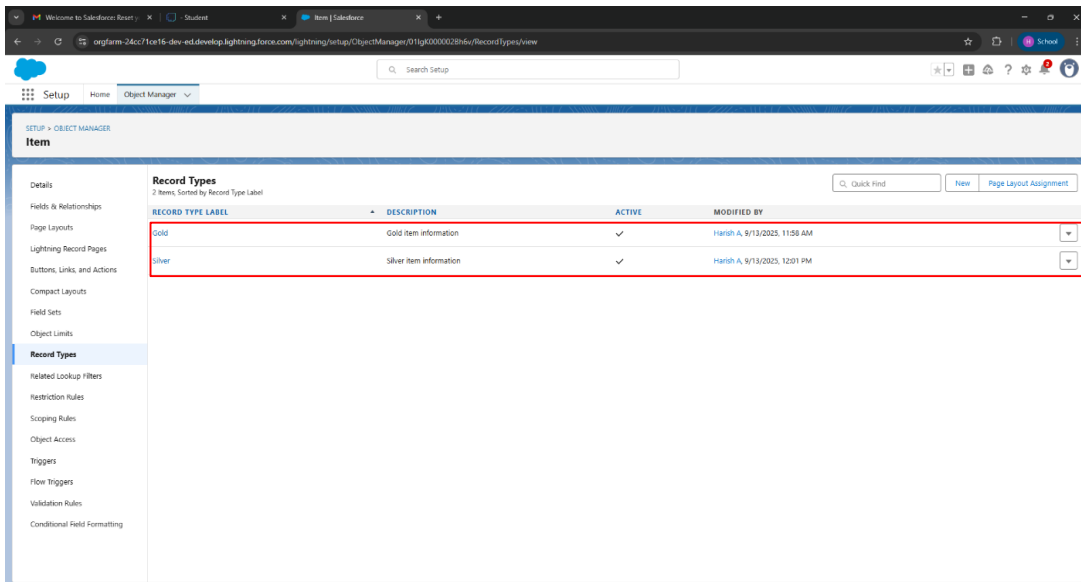
Page Layouts

3 Items, Sorted by Page Layout Name

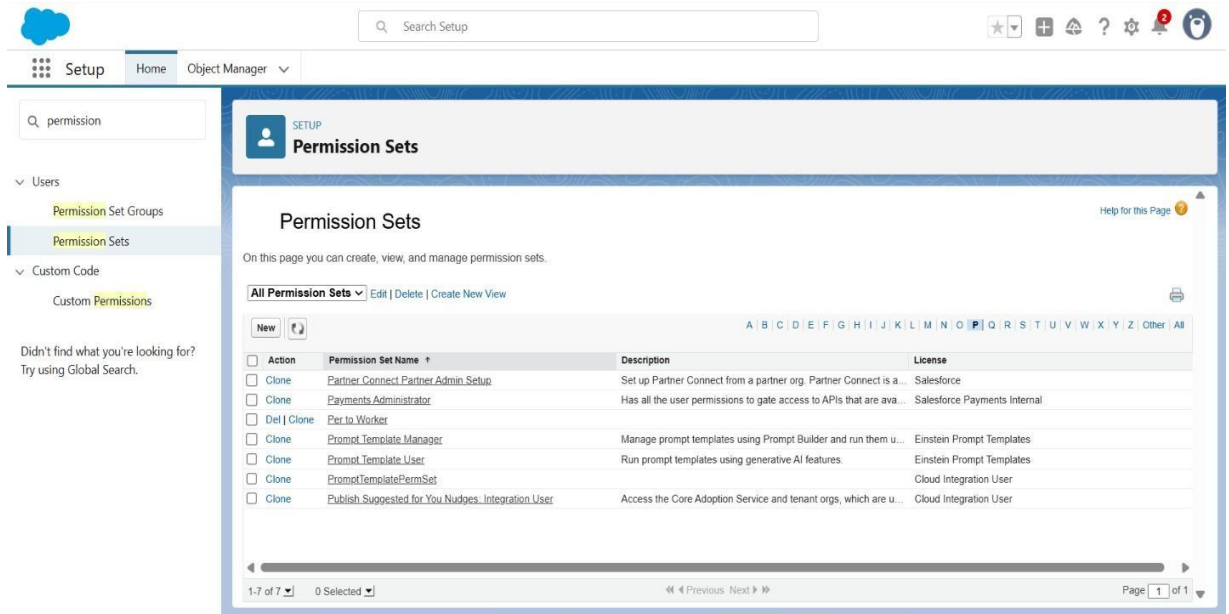
Quick Find New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Item Layout	Harish A, 9/12/2025, 1:23 AM	Harish A, 9/13/2025, 7:43 AM
Page Layout for Gold	Harish A, 9/13/2025, 11:04 AM	Harish A, 9/13/2025, 11:36 AM
Page Layout for Silver	Harish A, 9/13/2025, 11:30 AM	Harish A, 9/13/2025, 11:35 AM

- Creating a record type as Gold and Silver.



- Creating permission set as Per to Worker.



- 
- Creating a trigger and trigger handler class.

The screenshot shows the Salesforce Developer Console with the following Apex 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 }

```

The console also shows the 'Problems' tab at the bottom, which is currently empty.

- Creating, Viewing and Deleting records for Jewel Customer, Price, Item, Customer Order and Billing.

The screenshot shows the Salesforce interface with a 'Price Report' for 'Jewellery Inventory'. The report displays the following data:

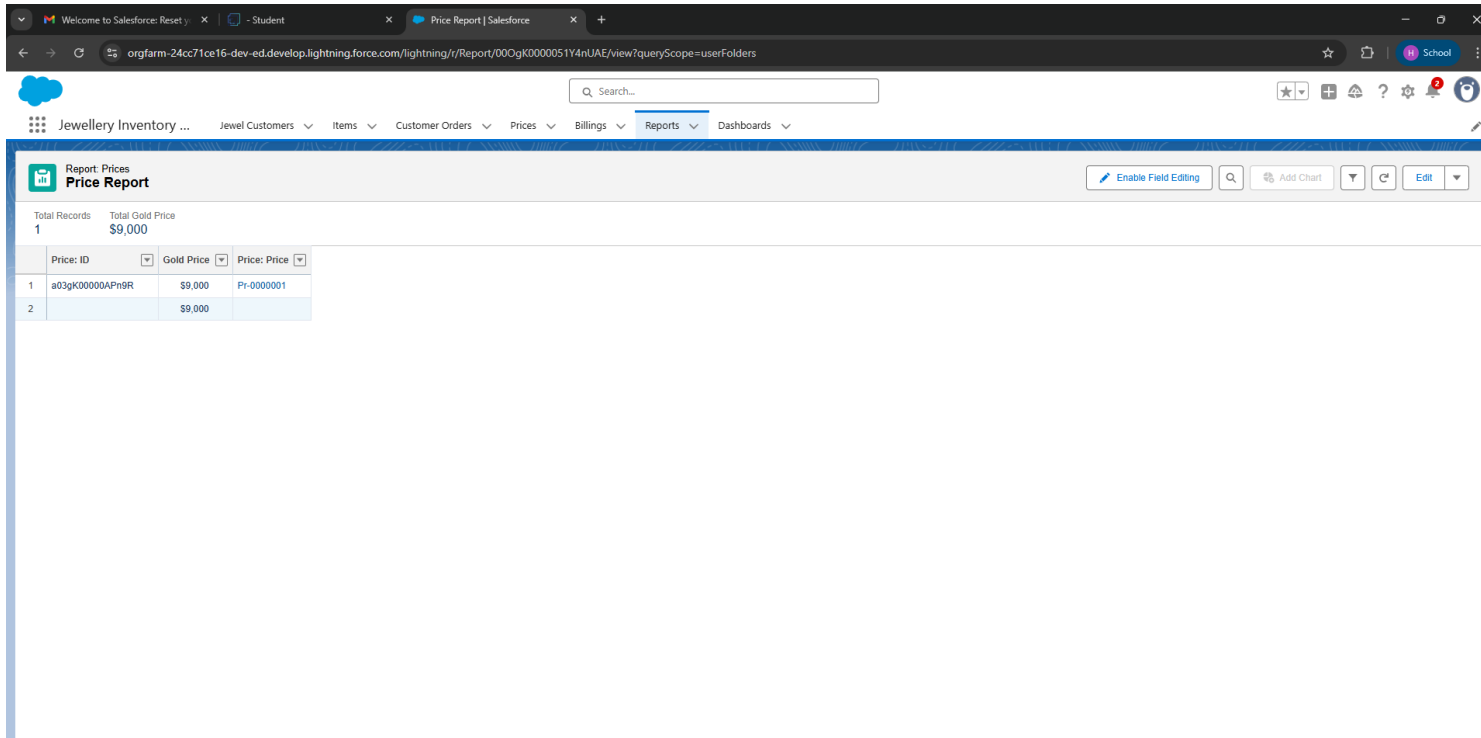
Price: ID	Gold Price	Price: Price
1	a03gK00000Aph9R	\$9,000
2		\$9,000

The report also shows a summary of the data:

Total Records	Total Gold Price
1	\$9,000



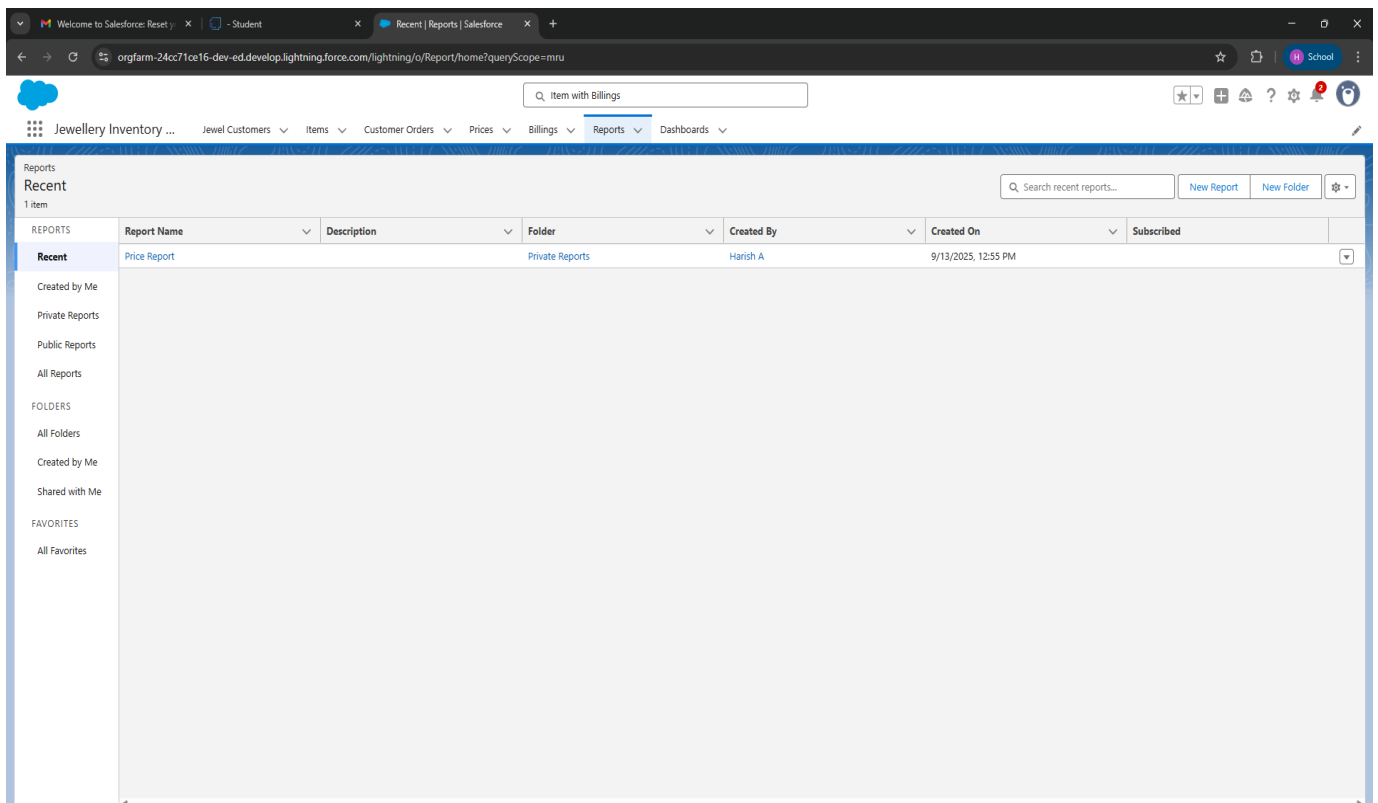
- Creating Reports.



The screenshot shows the Salesforce interface for a 'Price Report'. The top navigation bar includes 'Jewellery Inventory ...', 'Jewel Customers', 'Items', 'Customer Orders', 'Prices', 'Billings', 'Reports', and 'Dashboards'. The 'Reports' tab is active, displaying a 'Report: Prices' and 'Price Report' header. Below the header, there are summary statistics: 'Total Records: 1' and 'Total Gold Price: \$9,000'. A table lists the report data:

	Price: ID	Gold Price	Price: Price
1	a03gK00000APn9R	\$9,000	Pr-0000001
2		\$9,000	

On the right side of the report header, there are buttons for 'Enable Field Editing', 'Add Chart', and 'Edit'.



The screenshot shows the 'Recent' reports page in Salesforce. The top navigation bar is similar to the previous screenshot. The 'Reports' tab is active, displaying a 'Recent' header with a search bar and buttons for 'New Report' and 'New Folder'. Below the header, there is a table listing recent reports:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Price Report		Private Reports	Harish A	9/13/2025, 12:55 PM	

On the left side of the report list, there is a sidebar with navigation links: 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', 'FAVORITES', and 'All Favorites'.

- Creating Dashboard.

Welcome to Salesforce: Reset y x - Student x Recent | Dashboards | Salesforce x +

orgfarm-24cc71ce16-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mrui

Search... School

Jewellery Inventory ... Jewel Customers Items Customer Orders Prices Billings Reports Dashboards

Dashboards

Recent

1 item

Search recent dashboards... New Dashboard New Folder

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	dashboard 1		Private Dashboards	Harish A	9/13/2025, 1:03 PM	
Created by Me						
Private Dashboards						
All Dashboards						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

- Creating a flow.

Flow Builder interface showing the 'Billing Alert Flow - V1' in the 'Free-Form' view. The flow starts with a 'Start' event (Record-Triggered Flow) with the trigger 'A record is created or updated' for the 'Billing' object. This is followed by a 'Run Immediately' connector and an 'Action' node labeled 'notice'. The left sidebar shows 'Errors (1)' with a message: 'You can't activate this automation until you resolve an error.' and a notice: 'Provide at least one email recipient.' The top bar indicates the flow is 'Inactive' and provides buttons for 'Run', 'Debug', 'View Tests', 'Save As New Version', 'Save', and 'Activate'.

Setup page showing the 'Flows' section. The page displays a list of 61 flow definitions. The 'Billing Alert Flow' is highlighted in the list. The left sidebar shows navigation options for 'Setup', 'Home', and 'Object Manager'. The top bar includes a search bar and a 'Search Setup' button.

Flow Label	Process Type	Active	Template	Package State	Package Name	Last Modified	Last Modified Date
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Approvals Workflow: Evaluate Approval Requests	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Approvals Workflow: Process Approval Submission	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Authentication Provider User Registration	Identity User Registration Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Billing Alert Flow	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged	Harish A	9/13/2025, 1:27 PM	
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Chats Routed to Agents and Queues	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Chats Routed to Agents with the Right Skills	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Check Flow API Name	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Check Service Plan Eligibility	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Close Change Request & Related Issues	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS: Check Whether Any Step is Completed	Evaluation Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS: Notify Content Author	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS: Review Content	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS: Submit Content for Review	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS: Withdraw Review Request	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

# ADVANTAGES & DISADVANTAGES

## ADVANTAGES

- Provides a centralized platform to manage customers, sales, and inventory efficiently.
- Improves customer satisfaction through personalized offers, reminders, and better engagement.
- Reduces manual work with automated billing, payments, and order tracking.
- Enhances decision-making using reports and analytics for sales and inventory.
- Ensures role-based access, improving security and workflow management.

## DISADVANTAGES

- Initial setup and training may be time-consuming for traditional jewelers.
  - Requires internet connectivity for real-time updates and cloud integration.
  - Development and maintenance can involve high costs for small businesses.
  - Possible data security risks if not managed with proper encryption and backups.
  - Dependence on technology may affect operations during system downtime.
-

# CONCLUSION

The CRM Application for Jewel Management provides an effective solution to modernize jewelry business operations by integrating customer relationship management with sales and inventory control. It helps jewelers streamline their processes, improve customer engagement, and make better business decisions through analytics. While it may require proper training, investment, and maintenance, the long-term benefits such as improved efficiency, higher customer satisfaction, and business growth outweigh the challenges. Overall, this project bridges the gap between traditional jewelry practices and digital transformation, making jewel management more reliable and customer-centric.

---

```
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;
    }
}
```

```
}  
  
}
```

The Trigger :

```
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);  
  
}  
  
}
```