

CRM Application for Jewel Management

COLLEGE : EINSTEIN COLLEGE OF ENGINEERING

TEAM ID : NM2025TMID03171

TEAM SIZE : 4

TEAM MEMBERS DETAILS:

TEAM LEADER: BALA SUNDARA VINAYAGAM I

EMAIL : imsundar2005@gmail.com

TEAM MEMBER : KUFFINS ANTO C

EMAIL : Kuffinsa@gmail.com

TEAM MEMBER : BARATH RAGAVAN S

EMAIL : barathragavan89@gmail.com

TEAM MEMBER : JOYSON A

EMAIL : joysonjose23@gmail.com

1. INTRODUCTION

1.1 Project Overview:

This project focuses on building a Salesforce-based CRM solution tailored for jewellery shop operations. It helps manage day-to-day activities such as stock monitoring, price adjustments, customer handling, and billing. Using the Salesforce Lightning Platform, I created custom objects, automated workflows with Flows, and designed reports and dashboards to provide clear insights into sales, inventory movement, and customer trends..

1.2 Purpose:

The goal of this project is to transform traditional manual jewellery shop operations into a fully automated, cloud-driven Salesforce CRM system. It supports real-time inventory updates, flexible pricing management, customer billing, and order tracking within a unified platform. This solution improves customer experience, minimizes operational errors, and provides better insights for data-driven business decisions.

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

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

2. IDEATION PHASE

2.1 Problem Statement:

Traditional jewellery stores often rely on manual methods for stock management, pricing, and billing, which leads to inconsistent records, limited customer tracking, and slow decision-making. Without a unified system, customer interactions, sales history, and special order details remain scattered, creating operational gaps and reducing service quality.

Many small and medium jewellery retailers struggle to maintain accurate inventory levels, manage customer relationships, and handle customized orders efficiently. Existing general-purpose software fails to address industry-specific requirements such as purity-based pricing, real-time stock updates, and detailed customer profiling, resulting in errors and a less satisfying customer experience.

2.2 Empathy Map Canvas:

Think & Feel

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

Hear

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

See

- Registers with scribbled orders.

- Multiple Excel sheets for billing and inventory.

Say & Do

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

Pain

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

Gain

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

2.3 Brainstorming:

The brainstorming stage involved gathering inputs from various stakeholders—such as jewellery shop owners, sales staff, developers, and regular users—to identify key features and improvements needed in the CRM system. This collaborative discussion helped uncover real operational challenges in the jewellery business and guided how Salesforce’s cloud capabilities could be leveraged to simplify and optimize those processes..

Ideas collected during brainstorming:

- Use of custom objects for Items, Billing, Orders, and Customers.
- Automate stock management with flows.
- Dashboard for daily performance insights.
- Notifications for low inventory.
- Implement record-triggered and scheduled flows.

- Introduce validation rules to prevent data inconsistencies.
- Plan separate dashboards for different roles (sales, inventory, admin).

3. Requirement Analysis:

3.1 Customer Journey Map:

The customer journey map illustrates the complete path a customer takes—from the initial interaction with the store to post-purchase follow-ups. Mapping these stages helps pinpoint areas where the CRM can introduce automation, remove friction, and improve the overall customer experience.

Awareness Stage

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

Consideration Stage

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

Purchase Stage

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

Delivery Stage

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

Post-Purchase Stage

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

3.2 Solution Requirements:

This phase specifies the system's functional requirements—what the CRM should achieve—as well as the non-functional requirements, which describe the expected performance and quality standards. Key needs include:

- Real-time tracking of jewellery inventory
- Flexible and automated price management
- Billing with automatic tax computation
- Interactive dashboards and detailed reporting
- Strong data security with controlled user access
- Integration with communication channels like email and SMS
- Clear record ownership for auditing and traceability

3.3 Data Flow Diagrams:

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

Main Entities & Data Flow Points:

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

3.4 Technology Stack:

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

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

4. PROJECT DESIGN

4.1 Problem Solution Fit:

Problem: Manual processes and lack of centralized tracking

Solution: Salesforce CRM system automating every major jewelry workflow

4.2 Proposed Solution:

Five major custom objects: Item_c, Price_c, Jewel_Customer_c, Customer_Order_c, Billing_c

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

4.3 : Solution Architecture:

Objects and Relationships:

- Jewel_Customer_c ↔ Customer_Order_c ↔ Billing_c ↔ Item_c ↔ Price_c
- Lookup and Master-Detail fields used to link records
- Formula fields for auto-calculations (e.g., total billing amount)
- Validation rules for quantity and price limits
- Record Types to distinguish Gold, Silver, and Diamond workflows

5. PROJECT PLANNING AND SCHEDULING

5.1 Project Planning:

The planning and scheduling phase focuses on outlining the project timeline, scope, team roles, required tools, and key milestones. This stage ensures that development progresses in a structured and scalable way, keeping the project aligned with business objectives and enabling the CRM solution to be delivered efficiently and in well-defined phases.

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

6. PROJECT DEVELOPMENT PHASE - SALESFORCE GUIDED PROJECT

The development phase forms the foundation of the CRM system, where essential features were built using Salesforce's declarative components along with programmatic enhancements when needed. Work was carried out in

iterative Agile sprints, allowing continuous refinement and faster delivery. This stage was divided into multiple development activities to ensure structured and efficient implementation.

6.1 Developer Environment Setup:

- Create Salesforce Developer Org via developer.salesforce.com/signup

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

Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

Sign up for your Developer Edition.

- ✓ Build apps fast with drag-and-drop tools
- ✓ Go further with Apex code
- ✓ Build AI agents with Agentforce
- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs

Sign up for your Developer Edition
A free Salesforce Platform environment with Agentforce and Data Cloud.

First name: Bobbadl Harshitha ✓ Last name: Team ✓


Job title: Salesforce Developer ✓ Work email: bobbadlharshitha4@gmail.com ✓

Company: Ideal Institute of Technology ✓ Country/Region: India ✓


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

☒ I agree to the Main Service 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 

Sign Me Up



Ready for a new password?

Reset Password



Change Your Password

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

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

* New Password

.....

Good

* Confirm New Password

* Security Question

▼

In what city were you born?

* Answer

*=required

Change Password

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

6.2 Custom Object Creation:

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

1. Jewel Customer

Setup

Home

Object Manager

Q

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

Related Lookup Filters

Search Layouts

List View Button Layout

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

2. Item

Setup

Home

Object Manager

Q

Search Setup

★

+

🔔

?

⚙️

🔔

👤

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

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

Edit

Delete

3. Customer Order

Setup

Home

Object Manager

Search Setup

Star

Plus

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

Details

Edit

Delete

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

4. Price

Setup

Home

Object Manager

Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

User

SETUP > OBJECT MANAGER

Price

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

Details

Edit

Delete

Description

API Name

Price__c

Custom

✓

Singular Label

Price

Plural Label

Prices

Enable Reports

✓

Track Activities

Track Field History

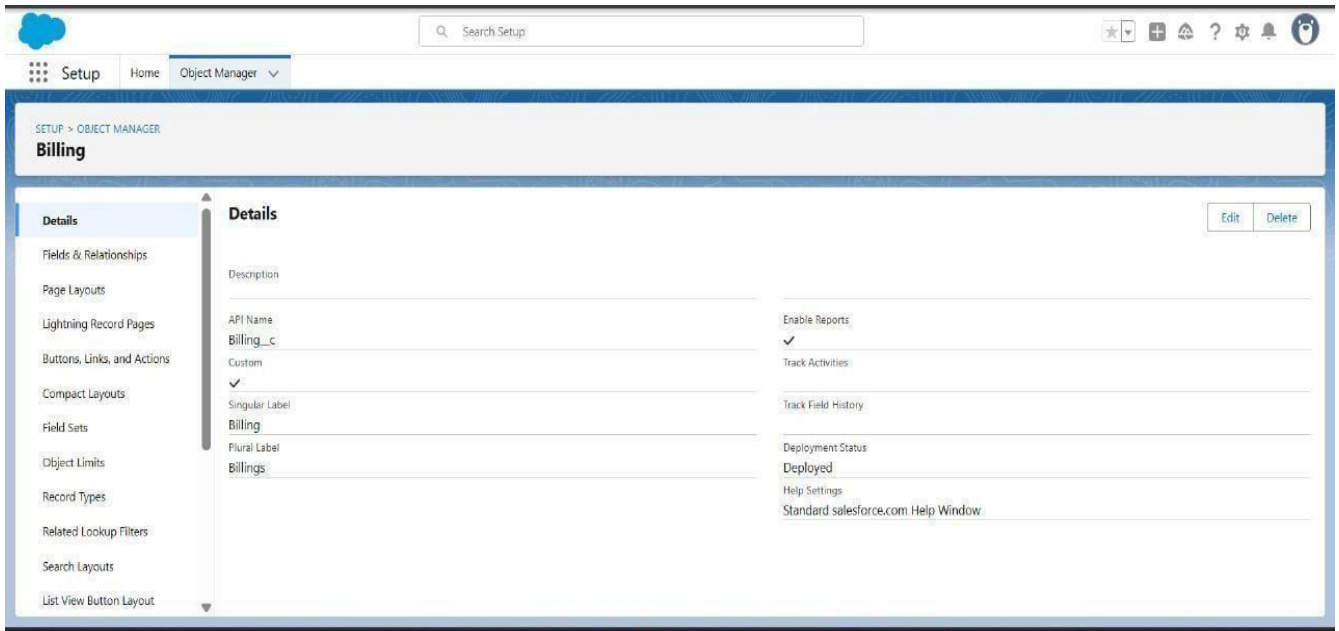
Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

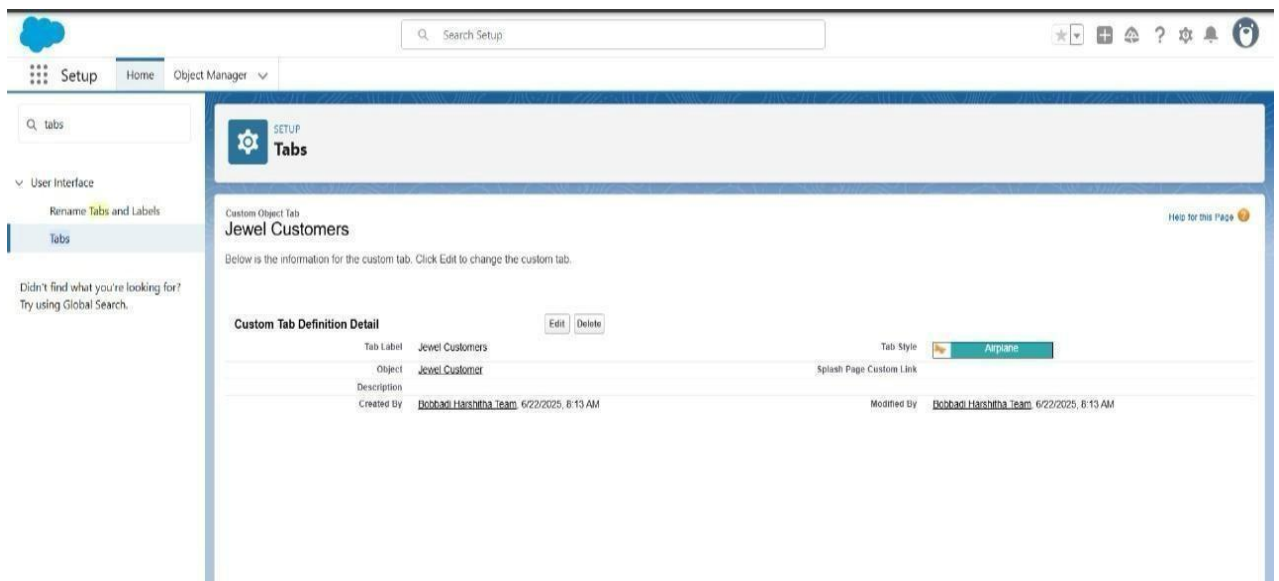
5. Billing



6.3 Creation of Tabs

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

1. Jewel Customer



2. Item

Setup

Home

Object Manager

Search Setup

Star

Plus

Home

Help

Settings

Notifications

User

Q tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?

Try using Global Search.

SETUP

Tabs

Custom Object Tab

Items

Help for this Page

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Edit

Delete

Tab Label	Items	Tab Style	Alarm clock
Object	Item	Splash Page Custom Link	
Description			
Created By	Bobbadri Harshitha Team	Modified By	Bobbadri Harshitha Team
	6/22/2025, 8:17 AM		6/22/2025, 8:17 AM

3. Customer Order

Setup

Home

Object Manager

Search Setup

Star

Plus

Home

Help

Settings

Notifications

User

Q tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?

Try using Global Search.

SETUP

Tabs

Custom Object Tab

Customer Orders

Help for this Page

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Edit

Delete

Tab Label	Customer Orders	Tab Style	Flag
Object	Customer Order	Splash Page Custom Link	
Description			
Created By	Bobbadri Harshitha Team	Modified By	Bobbadri Harshitha Team
	6/22/2025, 8:19 AM		6/22/2025, 8:19 AM

4. Price

5. Billing

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'tabs' entered. Under 'User Interface', 'Rename Tabs and Labels' is selected, and 'Tabs' is highlighted. The main content area is titled 'SETUP Tabs' and 'Custom Object Tab Prices'. It includes a 'Help for this Page' link. Below the title, it says 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' section shows the following information:

Tab Label	Prices	Tab Style	Fan
Object	Price	Splash Page Custom Link	
Description			
Created By	Boobadi Harshitha Team	6/22/2025, 6:20 AM	Modified By
			Boobadi Harshitha Team 6/22/2025, 6:20 AM

So we get the required all custom tabs as below

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'tabs' entered. Under 'User Interface', 'Rename Tabs and Labels' is selected, and 'Tabs' is highlighted. The main content area is titled 'SETUP Tabs' and 'Custom Tabs'. It includes a 'Help for this Page' link. Below the title, it says 'You can create new custom tabs to extend Salesforce functionality or to build new application functionality.' The 'Custom Object Tabs' section shows a list of tabs:

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

The 'Web Tabs' section shows 'No Web Tabs have been defined'.

6.4 Creation of Lightning App

App Name: Jewelry Inventory System

The image shows two screenshots from the Salesforce Lightning App Builder interface.

The top screenshot displays the 'App Details & Branding' settings for an app named 'Jewelry Inventory System'. The settings include:

- App Name:** Jewelry Inventory System
- Developer Name:** jewelry_inventory_system
- Description:** Elevate your look with elegance
- Image:** A placeholder for an app icon with an 'Upload' button.
- Primary Color Hex Value:** #0070D2
- Org Theme Options:** A checkbox labeled 'Use the app's image and color instead of the org's custom theme'.
- App Launcher Preview:** A preview of the app icon and name.

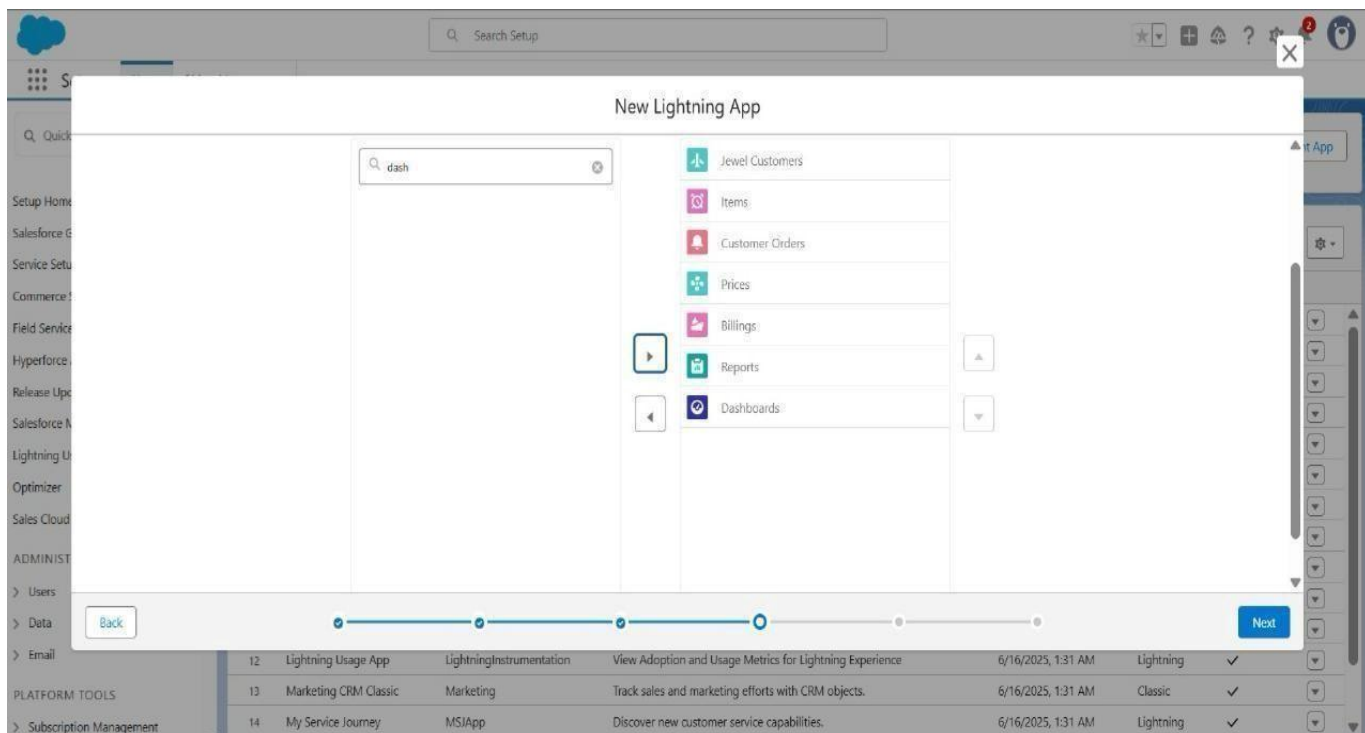
The bottom screenshot shows the 'New Lightning App' dialog box with the 'App Options' tab selected. The options are:

- Navigation and Form Factor:**
 - Navigation Style:** Standard navigation (radio button), Console navigation (radio button, selected).
 - Supported Form Factors:** Desktop and phone (radio button, selected), Desktop (radio button), Phone (radio button).
- Setup and Personalization:**
 - Setup Experience:** Setup (full set of Setup options) (radio button, selected), Service Setup (radio button), Data Cloud Setup (radio button).
 - App Personalization Settings:**
 - Disable end user personalization of nav items in this app (checkbox).
 - Clear workspace tabs for each new console session (checkbox).
 - Use Omni-Channel sidebar (checkbox).

The dialog box has a 'Back' button and a 'Next' button. Below the dialog box, a table lists existing Lightning Apps:

ID	App Name	App Type	Description	Created At	Theme	Status
12	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	6/16/2025, 1:31 AM	Lightning	✓
13	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	6/16/2025, 1:31 AM	Classic	✓
14	My Service Journey	MSIApp	Discover new customer service capabilities.	6/16/2025, 1:31 AM	Lightning	✓

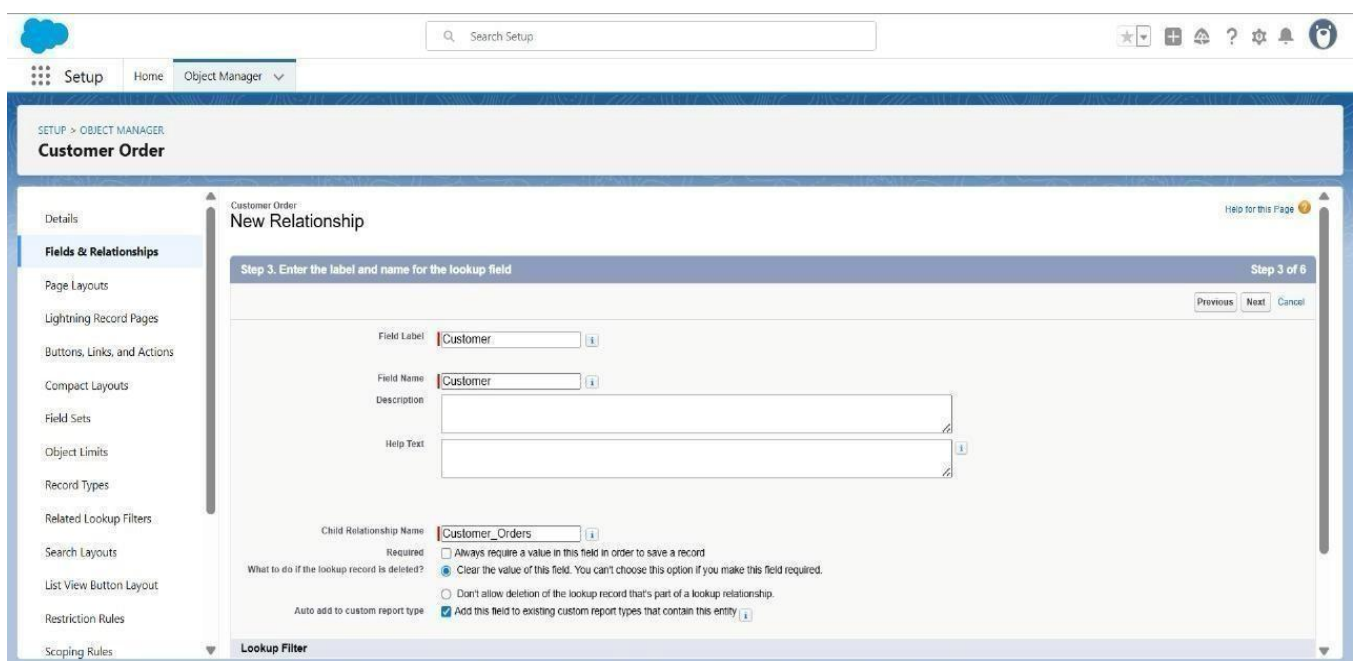
Navigation Items



6.5 Creation of Fields

1. Creating lookup relationship

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



Setup
Home
Object Manager

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

Customer Order
New Relationship
Help for this Page

Step 6. Add custom related lists
Step 6 of 6
Previous Save & New Save Cancel

Field Label	Customer
Data Type	Lookup
Field Name	Customer
Description	

Specify the time that the related list will have in all of the layouts associated with the parent.

Related List Label

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

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

Add Related List Page Layout Name

☒ Jewel Customer Layout

☒ Append related list to users' existing personal customizations.

Previous Save & New Save Cancel

2. Creating a Master-Detail Relationship

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

Setup
Home
Object Manager

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

Customer Order
New Relationship
Help for this Page

Step 5. Add reference field to Page Layouts
Step 5 of 6
Previous Next Cancel

Field Label	Item
Data Type	Master-Detail
Field Name	Item
Description	

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Field Page Layout Name

☒ Customer Order Layout

Previous Next Cancel

Setup
Home
Object Manager

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

Customer Order
New Relationship

Step 6 of 6

Step 6. Add custom related lists

Field Label	Item
Data Type	Master-Detail
Field Name	Item
Description	

Specify the title that the related list will have in all of the layouts associated with the parent.
Related List Label

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List	Page Layout Name
<input checked="" type="checkbox"/>	Item Layout

☒ Append related list to users' existing personal customizations

Previous Save & New Save Cancel

3. Creating Text Field in Jewel Customer Object

Setup
Home
Object Manager

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

Jewel Customer
New Custom Field

Step 2 of 4

Step 2. Enter the details

Field Label

Please enter the maximum length for a text field below.
Length

Field Name

Description

Help Text

Required ☐ Always require a value in this field in order to save a record
Unique ☐ Do not allow duplicate values
☐ Treat "ABC" and "abc" as duplicate values (case insensitive)
☐ Treat "ABC" and "abc" as different values (case sensitive)

External ID ☐ Set this field as the unique record identifier from an external system
Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity

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

Jewel Customer
New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label	City
Data Type	Text
Field Name	City
Description	

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

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

☒ Add Field ☐ Page Layout Name

☒ Jewel Customer Layout

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

Previous Save & New Save Cancel

4. Creating the Phone field in object Jewel Customer

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

Jewel Customer
New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label	Phone
Data Type	Phone
Field Name	Phone
Description	

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

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

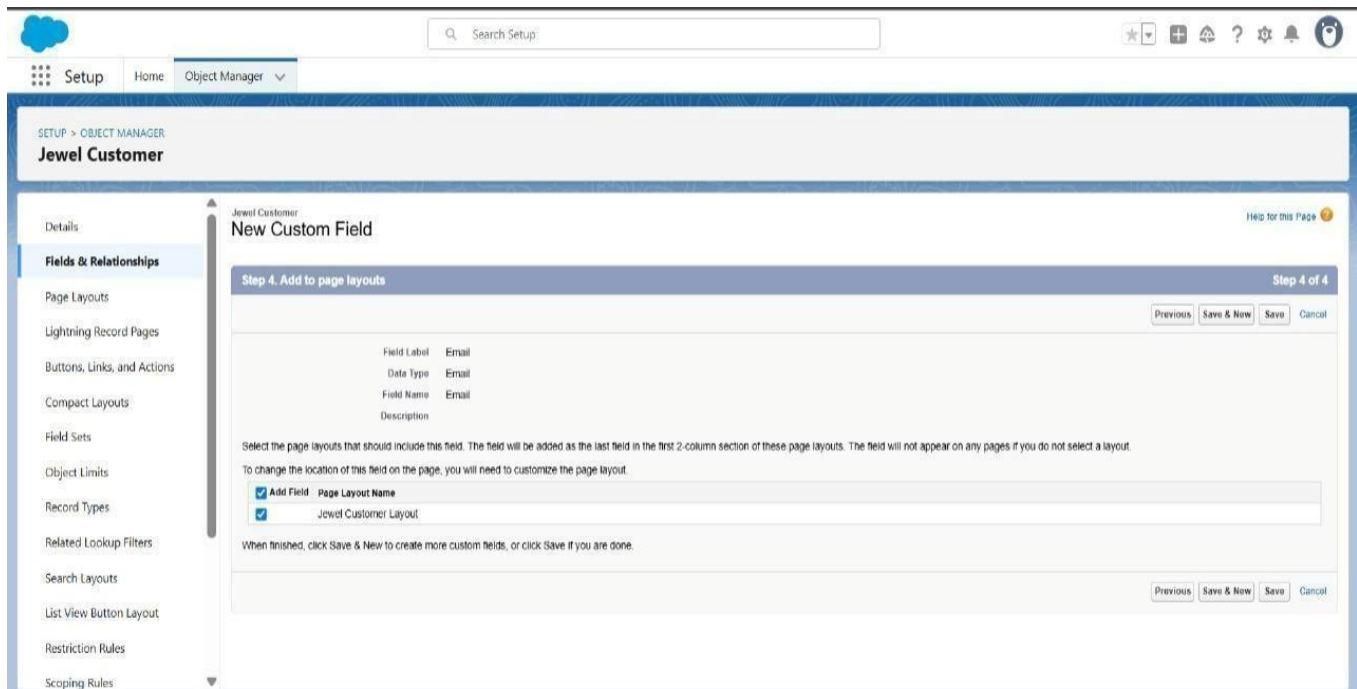
☒ Add Field ☐ Page Layout Name

☒ Jewel Customer Layout

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

Previous Save & New Save Cancel

5. Creating the Email field in object Jewel Customer



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

New Custom Field

Step 4. Add to page layouts

Field Label Email

Data Type Email

Field Name Email

Description

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

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

☒ Add Field

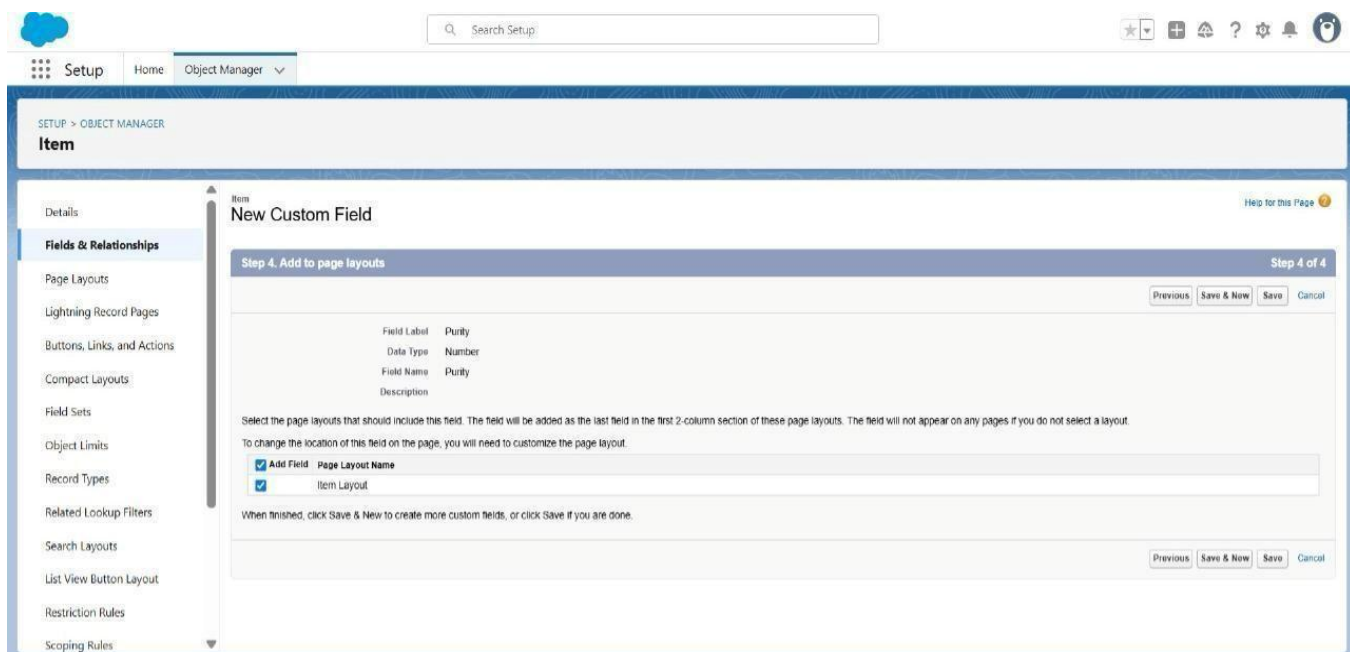
☒ Page Layout Name

Jewel Customer Layout

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

Previous Save & New Save Cancel

6. Creating the number field in Item object



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

New Custom Field

Step 4. Add to page layouts

Field Label Purity

Data Type Number

Field Name Purity

Description

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

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

☒ Add Field

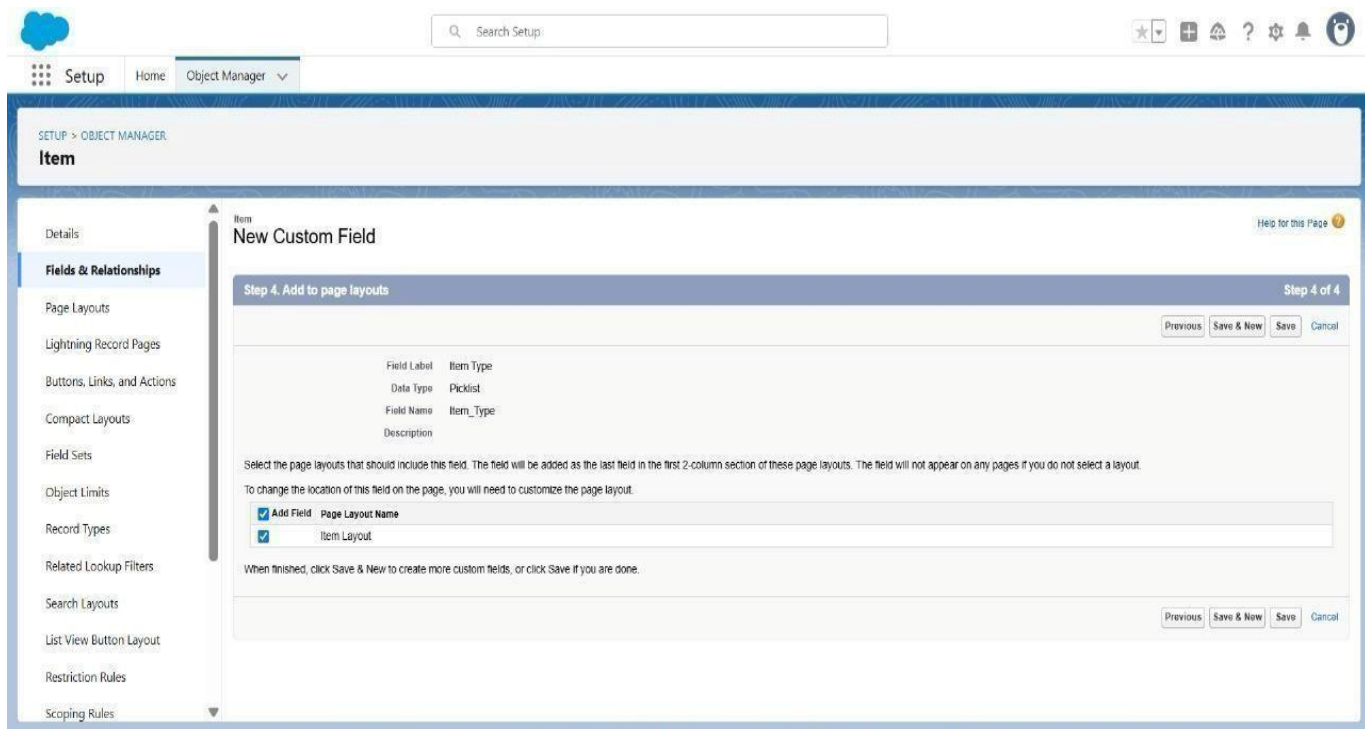
☒ Page Layout Name

Item Layout

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

Previous Save & New Save Cancel

7. Creating Picklist Field in Item Object



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

New Custom Field

Step 4. Add to page layouts

Previous Save & New Save Cancel

Field Label	Item Type
Data Type	Picklist
Field Name	Item_Type
Description	

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

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

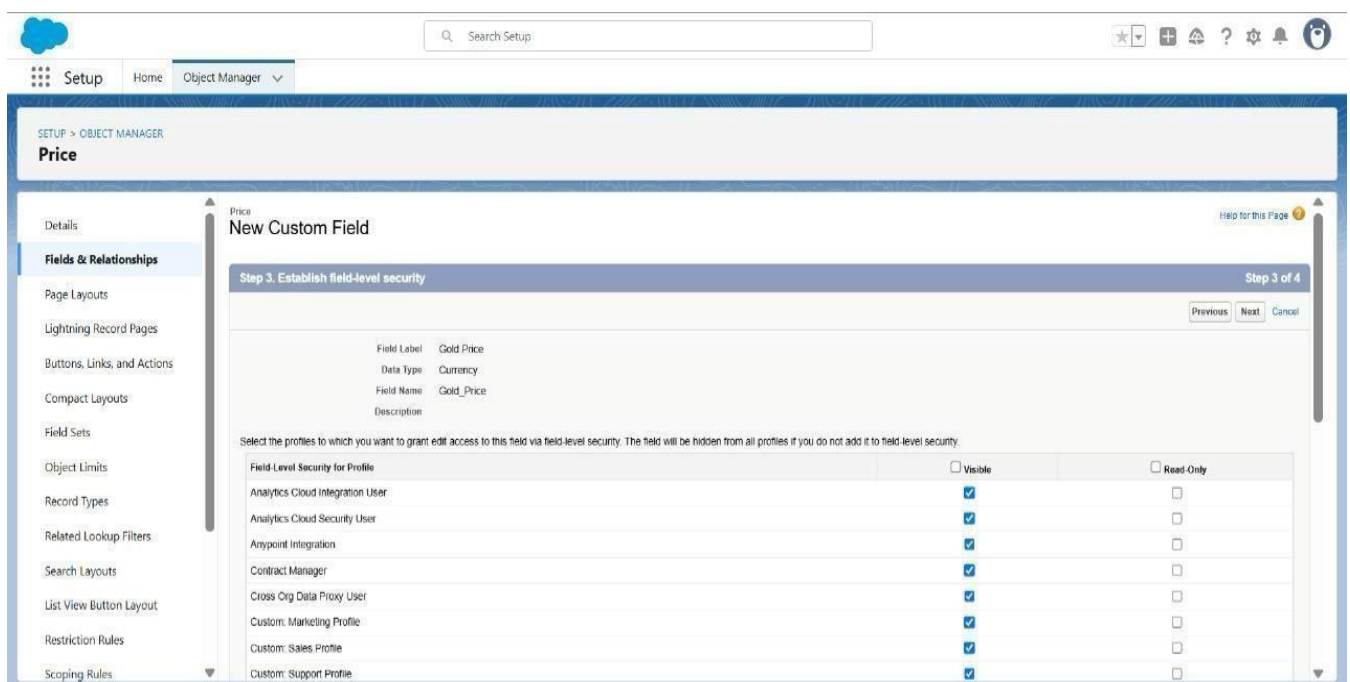
☒ Add Field

Page Layout Name
Item Layout

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

Previous Save & New Save Cancel

8. Creating Currency Field in Price Object



SETUP > OBJECT MANAGER

Price

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

New Custom Field

Step 3. Establish field-level security

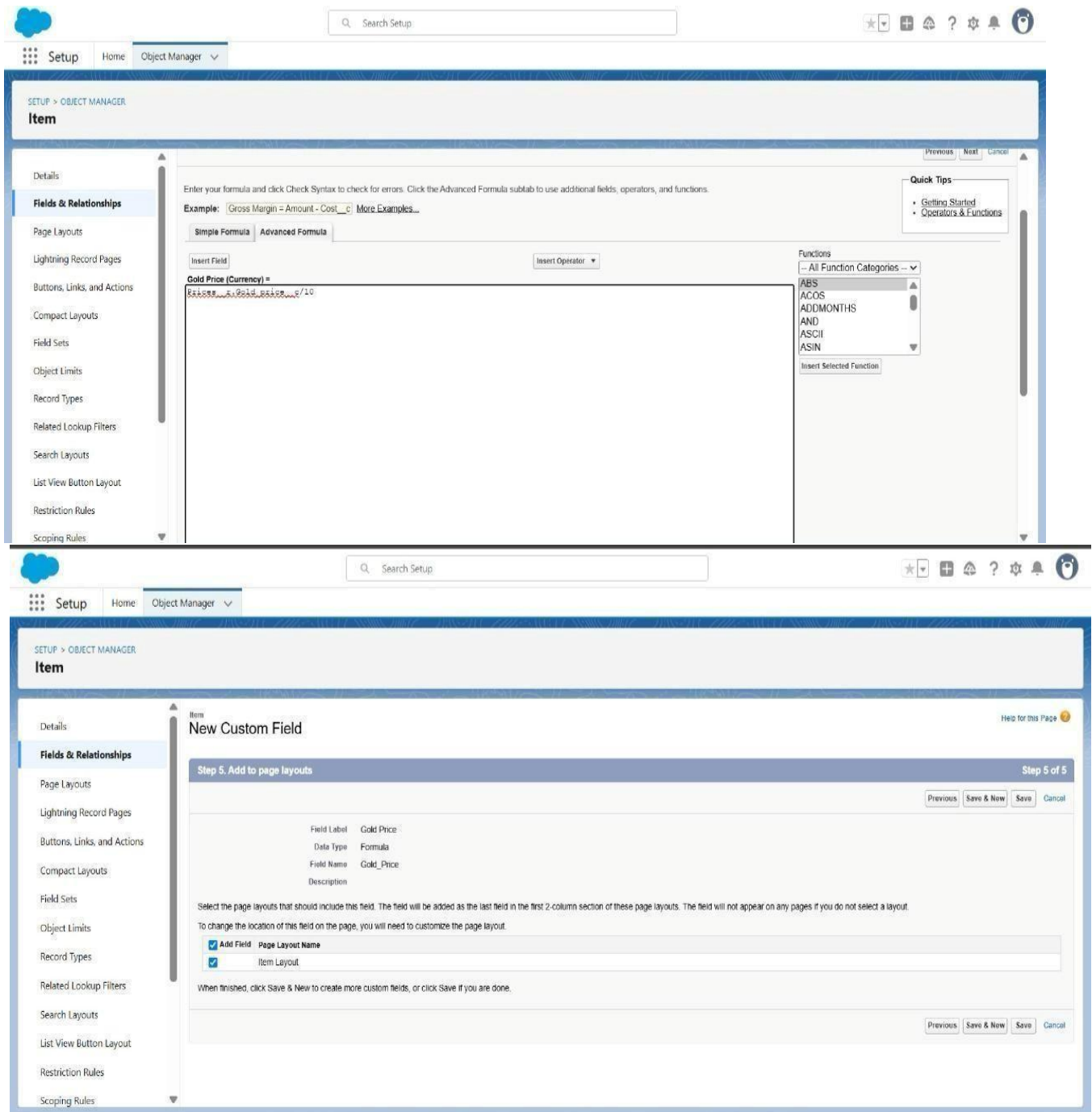
Previous Next Cancel

Field Label	Gold Price
Data Type	Currency
Field Name	Gold_Price
Description	

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field level security.

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

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



10. Creating Remaining Fields in Objects

Creating remaining fields in the objects

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

Setup > Object Manager

Jewel Customer

Details

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		

2.Price : Silver Price

Setup > 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, 5)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Price Id	Name	Auto Number		✓
Silver Price	Silver_Price__c	Currency(8, 5)		

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

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

Item

Details

Fields & Relationships

23 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
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Customer Name	Customer_Name__c	Lookup(Jewel Customer)		✓
Expected Days Of Return	Expected_Days_Of_Return__c	Picklist	Priority	
Gold Price	Gold_Price__c	Formula (Currency)		
Item Id	Name	Auto Number		✓
Item Type	Item_Type__c	Picklist		
KDM	KDM__c	Formula (Currency)		

4.Customer Order: Order Status

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

Customer Order

Details

Fields & Relationships

6 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
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Jewel Customer)		✓
Customer Order Id	Name	Auto Number		✓
Item	Item__c	Master-Detail(Item)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Order Status	Order_Status__c	Picklist		

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

Setup
 Home
 Object Manager

SETUP > OBJECT MANAGER
Billing

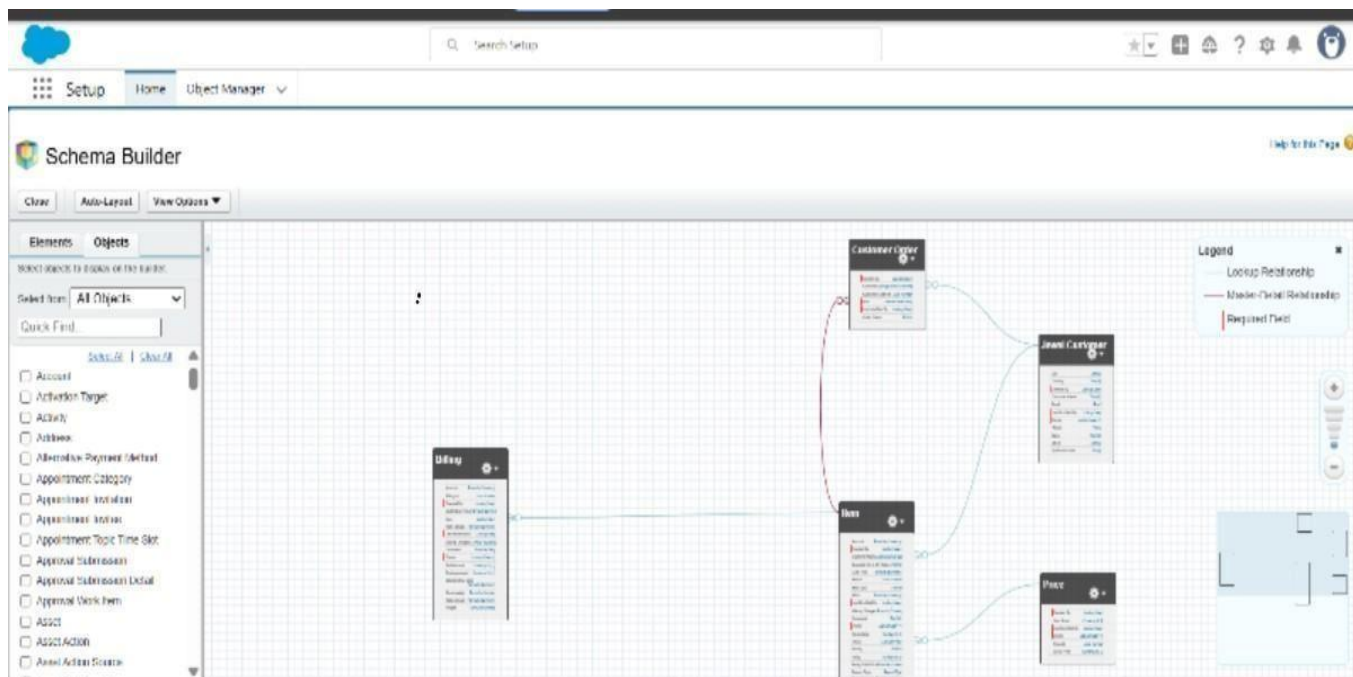
Details
 Fields & Relationships
 Page Layouts
 Lightning Record Pages
 Buttons, Links, and Actions
 Compact Layouts
 Field Sets
 Object Limits
 Record Types
 Related Lookup Filters
 Search Layouts
 List View Button Layout

Fields & Relationships
 16 Items. Sorted by Field Label

New
 Deleted Fields
 Field Dependencies
 Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Billing Id	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Gold/Silver Price	Gold_Silver_Price__c	Formula (Currency)		
Item	Item__c	Lookup(Item)		✓
KDM Charge	KDM_Charge__c	Formula (Currency)		
Last Modified By	LastModifiedById	Lookup(User)		
Making Charges	Making_Charges__c	Formula (Currency)		

11. Creation of Schema Builder



12. Creation of Field Dependencies

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

Item Field Dependencies

< Back to Custom Object: Item

This page allows you to define dependencies between fields (e.g., dependent picklists).

Action	Controlling Field	Dependent Field	Modified By
Edit Del	Priority	Expected Days Of Return	Bobbaadi Harshitha Team, 6/23/2025, 6:53 AM

13. Creation of Validation Rules

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

Related Lookup Filters

Search Layouts

List View Button Layout

Jewel Customer Validation Rule

[Back to Jewel Customer](#)

Help for this Page

Validation Rule Detail Edit Clone

Rule Name	Postal_Code	Active	✓
Error Condition Formula	AND(OR(LEN(Zip_Postal_code__c) <= 6, NOT(REGEX(Zip_Postal_code__c, "[0-9]{6}\$"))) NOT(ISBLANK(Zip_Postal_code__c))))		
Error Message	Must contain 6 digits	Error Location	Zip/Postal code
Description			
Created By	Robbadi Harshitha Team 6/23/2025, 6:58 AM	Modified By	Robbadi Harshitha Team 6/23/2025, 6:58 AM

Edit Clone

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

Related Lookup Filters

Search Layouts

List View Button Layout

Jewel Customer Validation Rule

[Back to Jewel Customer](#)

Help for this Page

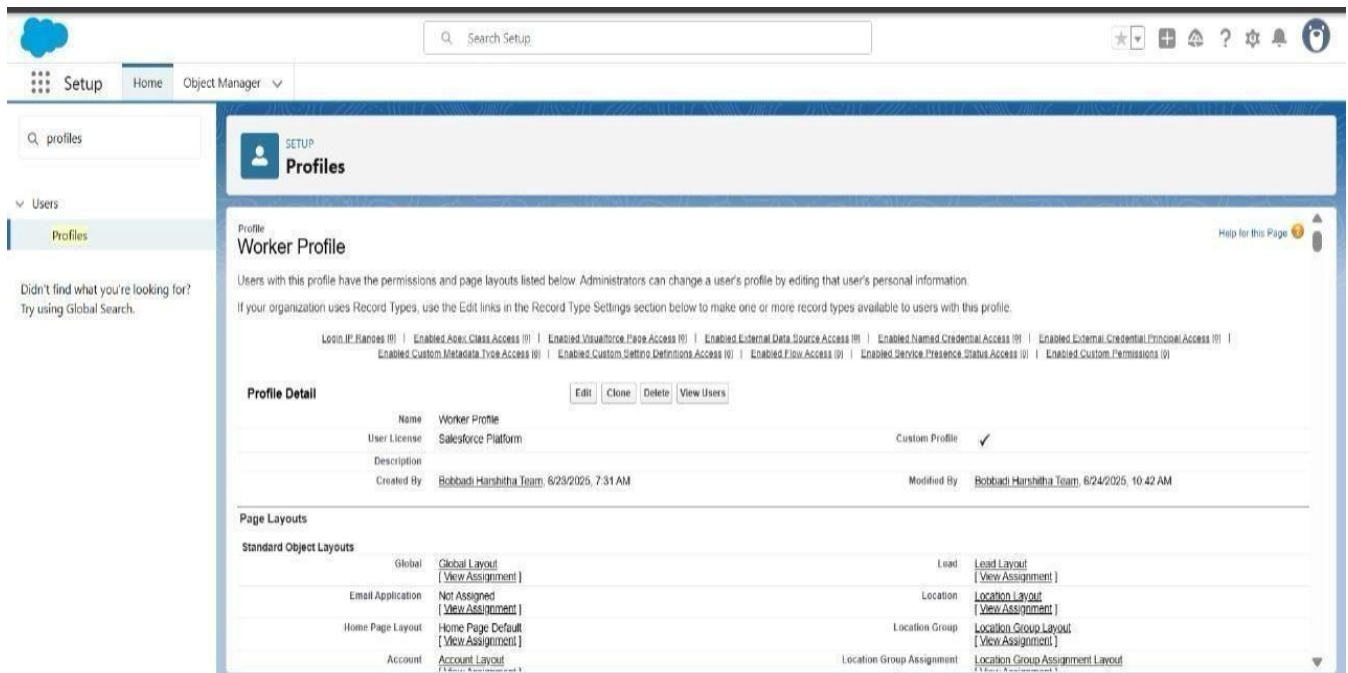
Validation Rule Detail Edit Clone

Rule Name	ValidationRule_For_JewelCustomerObject	Active	✓
Error Condition Formula	OR(ISBLANK(City__c), ISBLANK(Country__c), ISBLANK(Phone__c), ISBLANK(State__c), ISBLANK(Street__c))		
Error Message	Please fill Required fields	Error Location	Top of Page
Description			
Created By	Robbadi Harshitha Team 6/23/2025, 7:00 AM	Modified By	Robbadi Harshitha Team 6/23/2025, 7:00 AM

Edit Clone

6.6 Creation of Profiles

We create the goldsmith profile and the worker profile



The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'profiles' and a navigation menu with 'Users' and 'Profiles' (selected). The main content area is titled 'Worker Profile' and includes a description: '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.'

Below the description is a list of enabled features for the profile, including 'Login IP Ranges', 'Enabled Apex Class Access', 'Enabled Visualforce Page Access', 'Enabled External Data Source Access', 'Enabled Named Credential Access', 'Enabled External Credential Personal Access', 'Enabled Custom Metadata Type Access', 'Enabled Custom Settings Definitions Access', 'Enabled Flow Access', 'Enabled Service Presence Status Access', and 'Enabled Custom Permissions'.

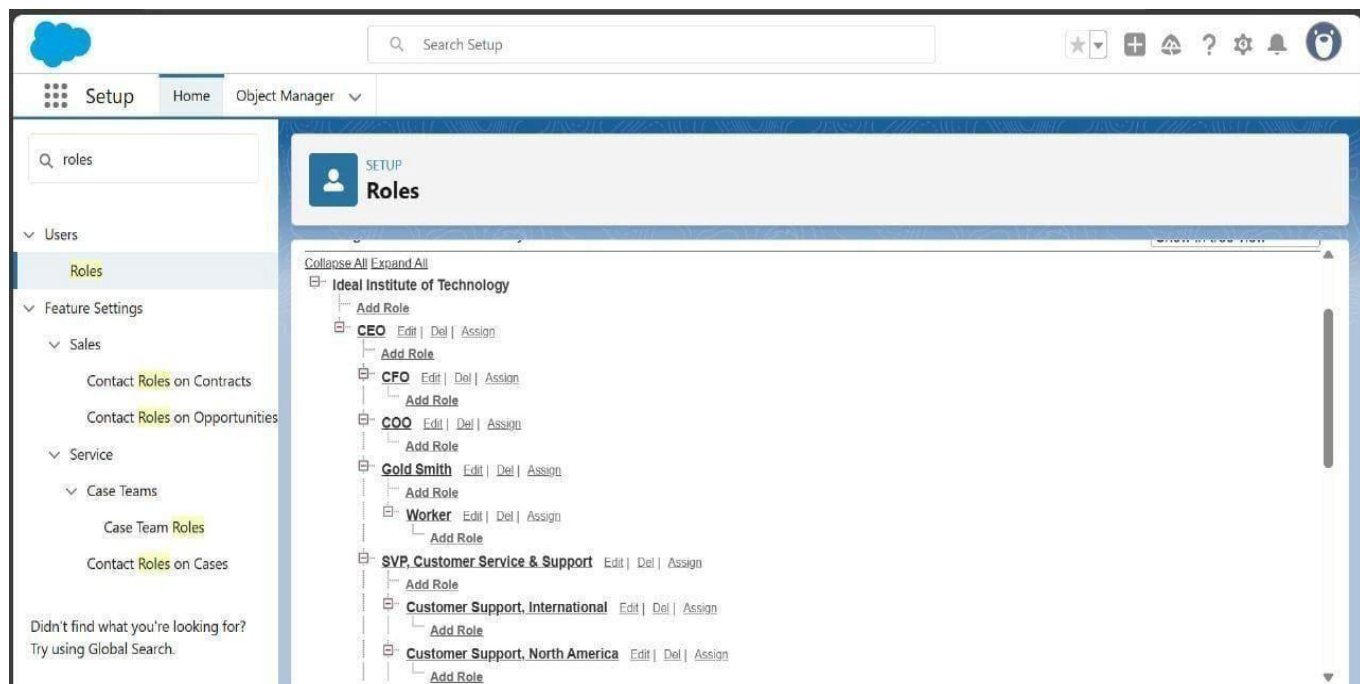
The 'Profile Detail' section shows the following information:

Name	Worker Profile
User License	Salesforce Platform
Description	Custom Profile
Created By	Bobbadi Harshitha Team: 8/23/2025, 7:31 AM
Modified By	Bobbadi Harshitha Team: 8/24/2025, 10:42 AM

The 'Page Layouts' section shows the following assignments:

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

6.7 Creation of Roles



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' and 'Roles' (selected). The main content area is titled 'Ideal Institute of Technology' and shows a hierarchical role structure.

The role hierarchy is as follows:

- CEO** (Edit | Del | Assign)
 - CFO** (Edit | Del | Assign)
 - COO** (Edit | Del | Assign)
 - Gold Smith** (Edit | Del | Assign)
 - Worker** (Edit | Del | Assign)
 - SVP, Customer Service & Support** (Edit | Del | Assign)
 - Customer Support, International** (Edit | Del | Assign)
 - Customer Support, North America** (Edit | Del | Assign)

6.8 Creation of Users

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, Object Manager, and a list of administrative tools including Users, Profiles, Roles, and User Management Settings. The main content area is titled 'All Users' and provides instructions on creating, viewing, and managing users. It includes a table of existing users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table lists several users, including Chatter Expert, EPIC_OrgFarm, Mikaelson_Kol, Mikaelson_Niklaus, Team_Bobbadil_Harshitha, User_Integration, and User_Security. At the bottom, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00d9d0005vynquao.azmcsuopmm@chatter.salesforce.com		✓	Chatter Free User
Edit	EPIC_OrgFarm	OEPIG	epic.4162c3f7a152@orgfarm.com		✓	System Administrator
Edit	Mikaelson_Kol	Mikael	mkacel@gmail.com	Worker	✓	Worker Profile
Edit	Mikaelson_Niklaus	Niklaus	nmikelson@gmail.com	Gold Smith	✓	Gold Smith
Edit	Team_Bobbadil_Harshitha	bob	bobbadilharshitha1974@apexforce.com		✓	System Administrator
Edit	User_Integration	integ	integration@00d9d0005vynquao.com		✓	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00d9d0005vynquao.com		✓	Analytics Cloud Security User

6.9 Creation of Page Layouts

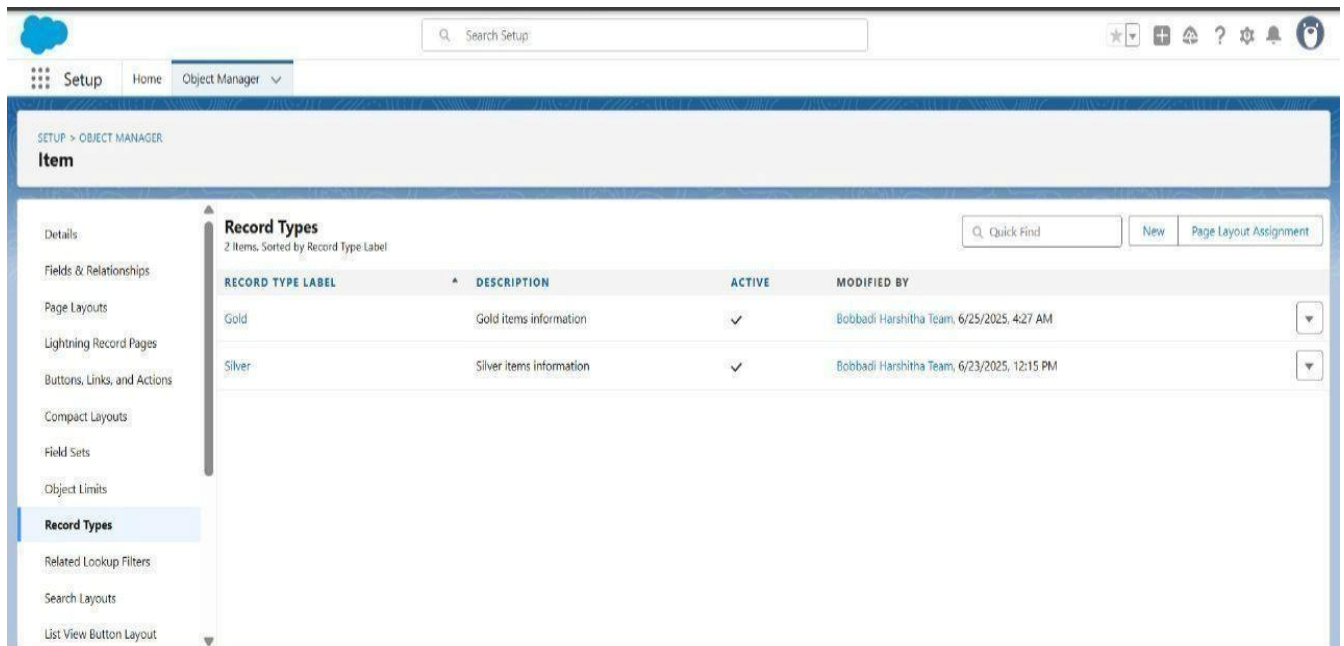
We create the page layouts for gold and silver items

The screenshot shows the Salesforce Setup interface for configuring a page layout. The left sidebar contains navigation links: Setup, Home, Object Manager, and a list of administrative tools including Page Layouts, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Page Layout for Gold' and provides instructions on creating, viewing, and managing page layouts. It includes a table of existing page layouts with columns for Section, Customer Name, Item Type, Ornament, Priority, Silver Price, and Weight. The table lists several page layouts, including Expected Days Of..., Gold Price, Last Modified By, Making Charges, Purity, Purity Gold Price, Record Type, and Total Weight. At the bottom, there are buttons for 'New Page Layout', 'Reset Page Layout', and 'Add Multiple Page Layouts'.

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

6.9 Creation of Record Types

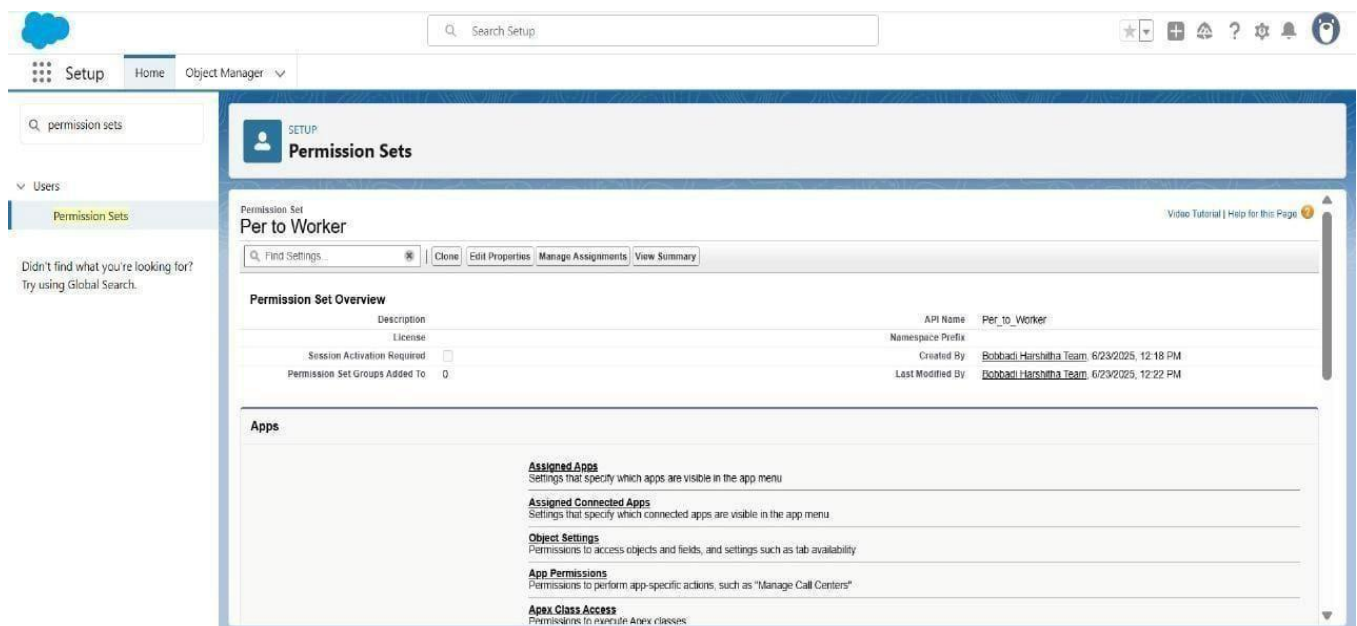
We create the gold an silver records



The screenshot shows the Salesforce Setup interface, specifically the Object Manager for the 'Item' object. The 'Record Types' section is active, displaying a table with 2 items. The table columns are Record Type Label, Description, Active, and Modified By. The 'Gold' record type is active and was created by the Bobbadi Harshitha Team on 6/25/2025 at 4:27 AM. The 'Silver' record type is also active and was created by the same team on 6/23/2025 at 12:15 PM. The left sidebar shows the navigation menu with 'Record Types' highlighted. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	Bobbadi Harshitha Team, 6/25/2025, 4:27 AM
Silver	Silver items information	✓	Bobbadi Harshitha Team, 6/23/2025, 12:15 PM

6.10 Creation of Permission Sets



The screenshot shows the Salesforce Setup interface, specifically the 'Permission Sets' section. The 'Per to Worker' permission set is selected. The 'Permission Set Overview' section displays details for the 'Per_to_Worker' API Name, including the license, session activation required, and permission set groups added. The 'Apps' section lists the assigned apps, including 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', and 'Apex Class Access'. The left sidebar shows the navigation menu with 'Permission Sets' highlighted. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'.

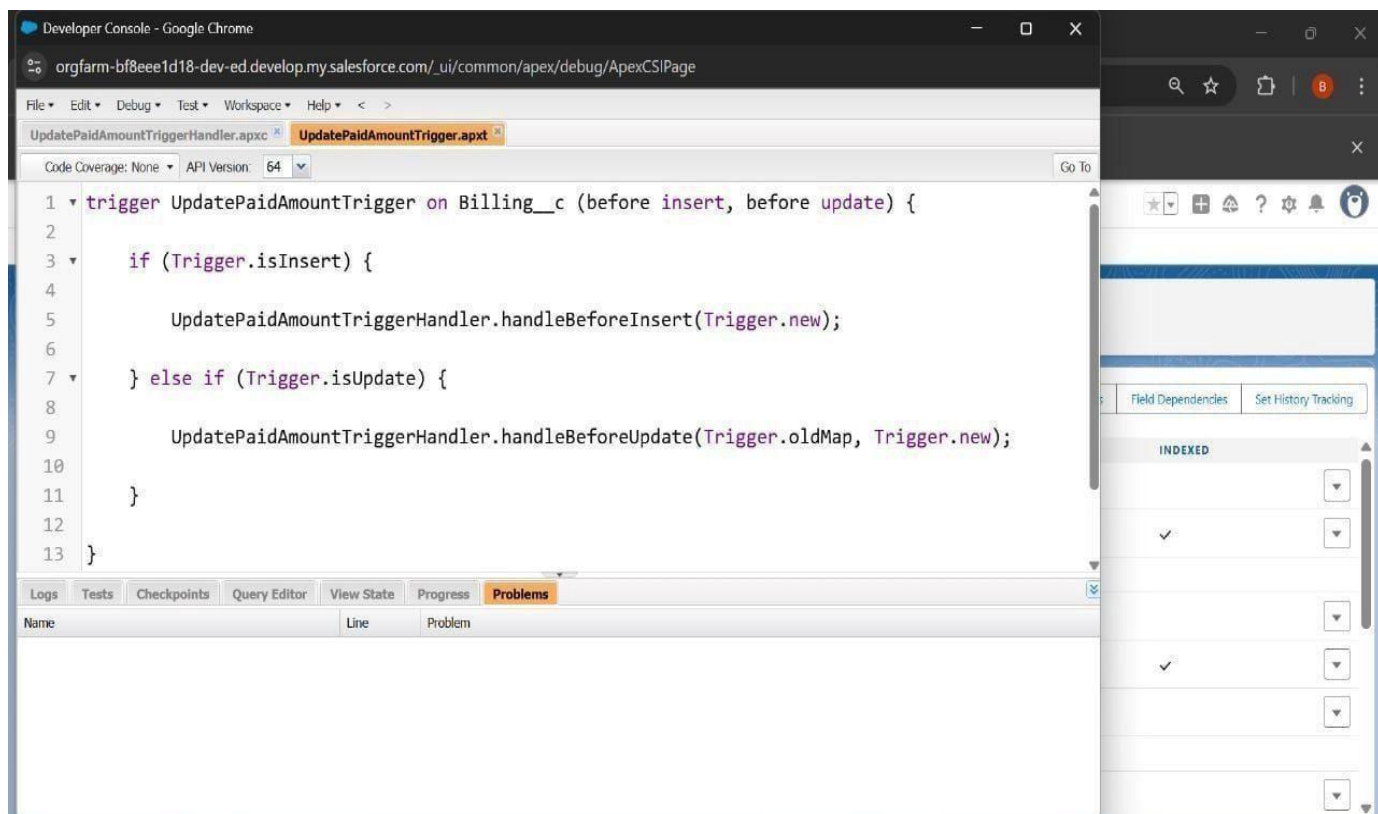
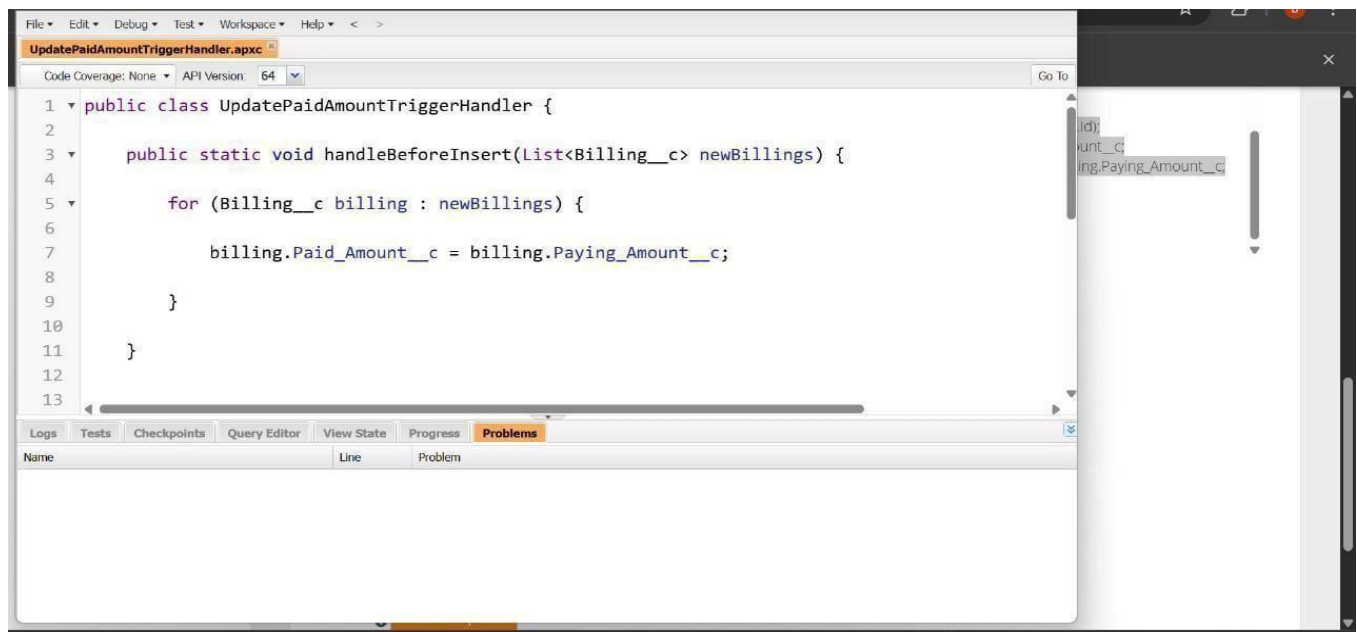
Permission Set Overview

API Name	Per_to_Worker
Description	
License	
Session Activation Required	<input type="checkbox"/>
Permission Set Groups Added To	0
Created By	Bobbadi Harshitha Team, 6/23/2025, 12:18 PM
Last Modified By	Bobbadi Harshitha Team, 6/23/2025, 12:22 PM

Apps

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes

6.11 Creation of Trigger



6.12 Creation of User Adoption

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

Search...

★

+

🔍

?

⚙️

🔔

👤

jewelry Inventory Sy...

Reports

Reports

Recent

3 items

Q Search recent reports...

New Report

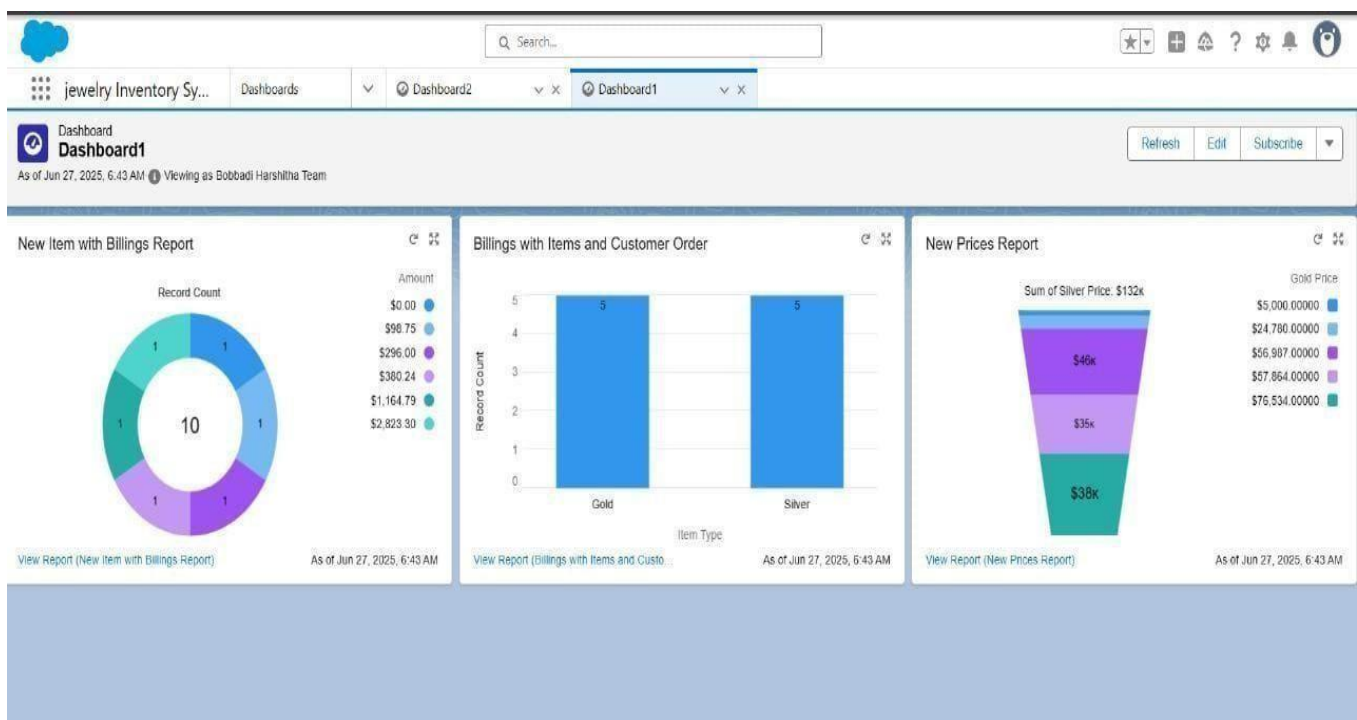
New Folder

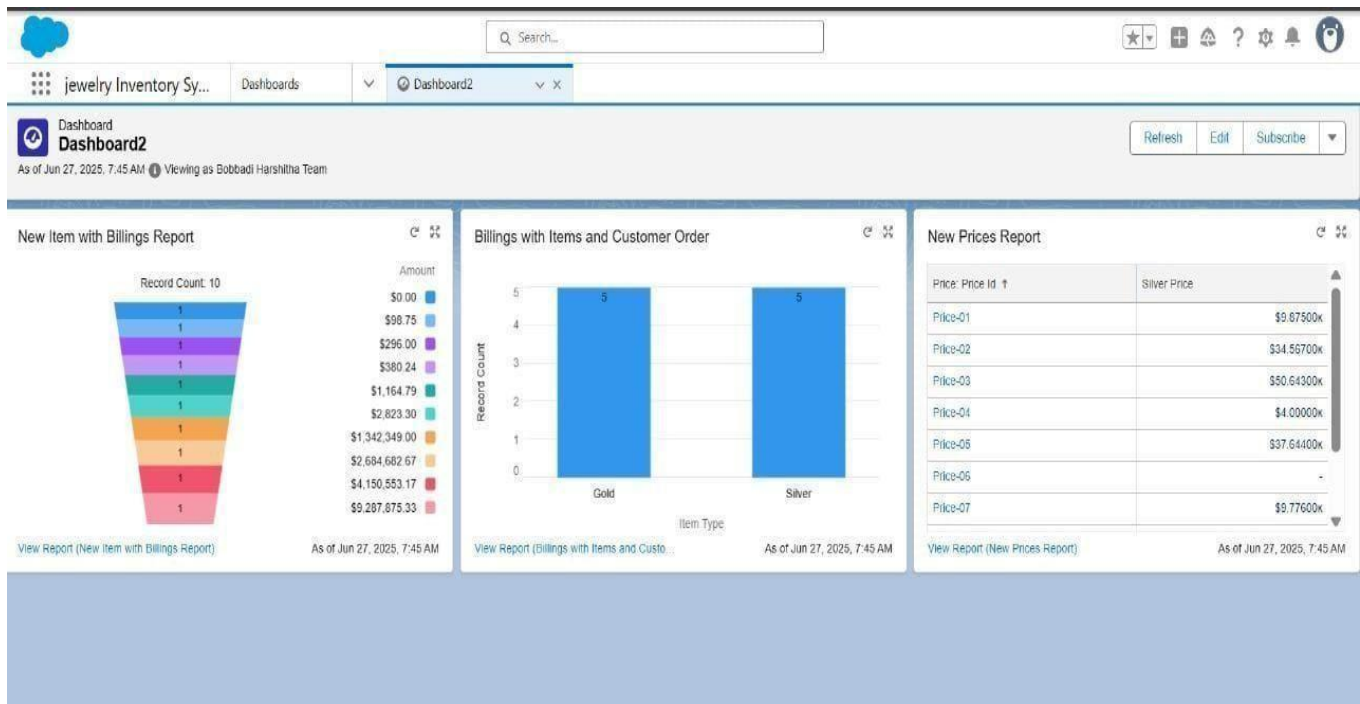
⚙️

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Billings with Items and Customer Order		Private Reports	Bobbadi Harshitha Team	6/25/2025, 10:44 AM	📄
Created by Me	New Item with Billings Report		Private Reports	Bobbadi Harshitha Team	6/25/2025, 10:43 AM	📄
Private Reports	New Prices Report		Private Reports	Bobbadi Harshitha Team	6/25/2025, 9:56 AM	📄
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

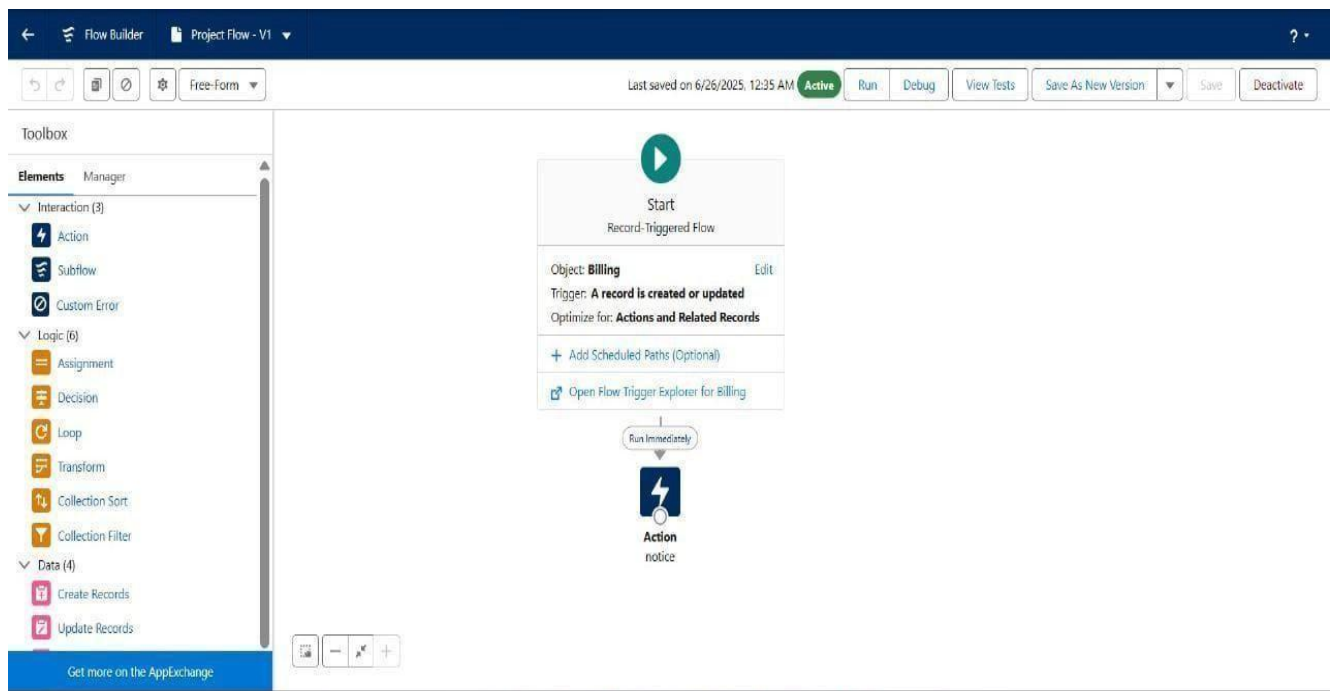
6.14 Creation of Dashboards

Dashboard 1



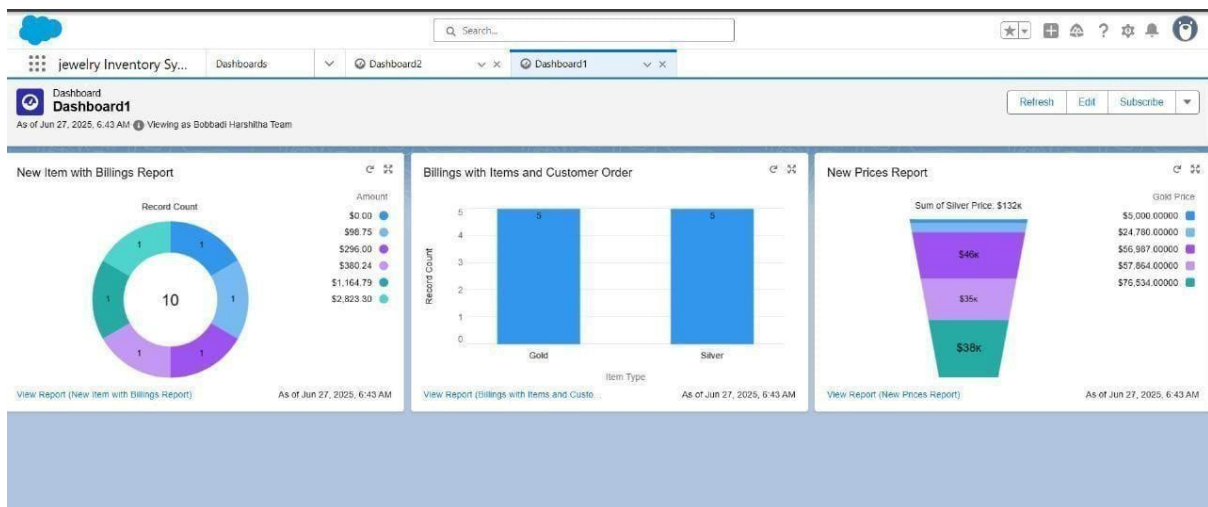


6.15 Creation of Flows



7 FUNCTIONAL AND PERFORMANCE TESTING

Dashboard-1:



Performance Observations (Phase Testing) for Dashboard-1:

1. Accurate Data Visualization

All dashboard charts—including donut, bar, and funnel—display real-time data correctly. Billing records (total of 10) and pricing segments match the entries stored in the system. Gold and Silver categories are properly classified, with each showing five records in the bar chart.

2. Functional Report Integration

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

3. Pricing Tier Segmentation is Clear

Funnel chart shows diverse price bands for Gold and Silver items (e.g., ₹5k to ₹76k). Total Silver pricing is correctly summed up as ₹132k, indicating correct aggregation logic.

4. UI Load Stability

All dashboard components load without errors or latency during testing. Visuals are responsive and easy to interpret for both technical and non-technical users.

5. Equal Distribution Verification

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

6. Test Pass Indicators

No missing data points, broken charts, or incorrect values observed during this testing phase. Dashboard ready for stakeholder review or user acceptance testing (UAT).

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

1. Improve Inventory and Billing Accuracy:

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

2. Enhance Customer Order Management:

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

3. Enable Data-Driven Business Decisions:

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

Dashboard-2:



Performance Observations from Dashboard-2:

1. New Item with Billings Report:

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

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

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

3. New Prices Report:

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

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

1. Track New Items with Billing Details:

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

2. Analyze Customer Orders by Item Type:

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

3. Monitor and Update Jewelry Prices:

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

8 RESULTS (OUTPUT SCREENSHOTS)

A. Automated Emails (using templates):

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

B. Automated Workflows:

- **Trigger-based validations**

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

C. Approval Workflow Output:

- **Product Addition Requests**

- New products require manager approval before appearing in inventory

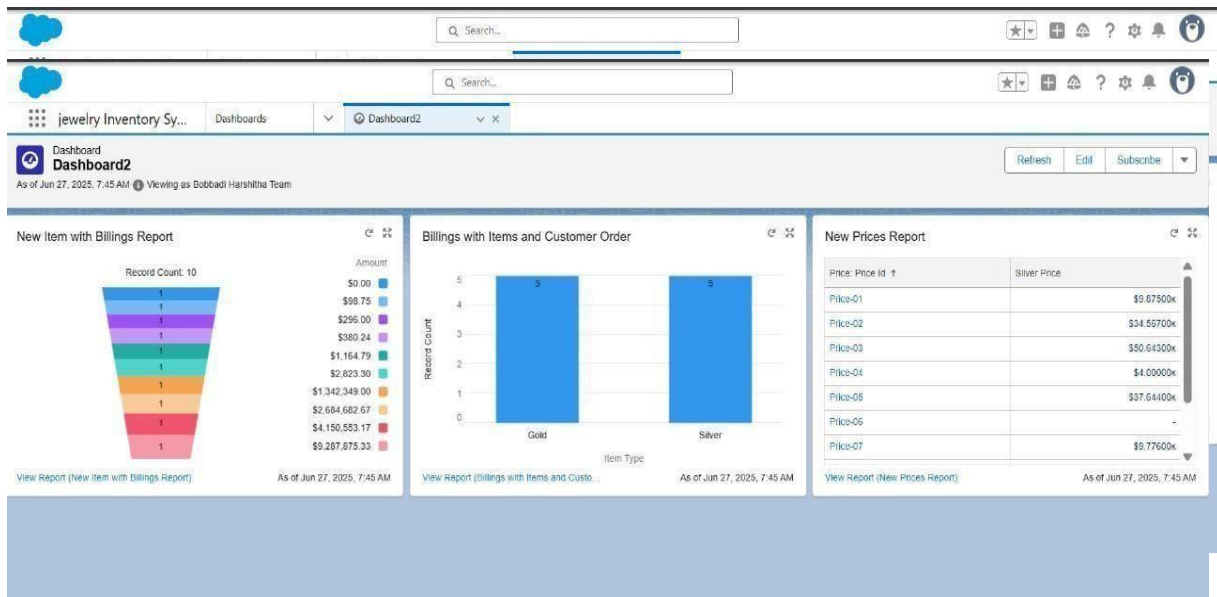
- **Stock Reorder Requests**

- Approval triggered when reorder level is reached

- **Notifications**

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

Dashboards:



Reports:

Report: Prices

New Prices Report

Total Records: 10 Total Silver Price: \$642,908.00000

Enable Field Editing Add Chart Edit

Gold Price ↑	Price: Price Id ↓	Silver Price
<input type="checkbox"/> (1)	Price-06	-
Subtotal		\$0.00000
<input type="checkbox"/> \$5,000.00000 (1)	Price-04	\$4,000.00000
Subtotal		\$4,000.00000
<input type="checkbox"/> \$24,780.00000 (1)	Price-01	\$9,875.00000
Subtotal		\$9,875.00000
<input type="checkbox"/> \$58,987.00000 (1)	Price-09	\$45,670.00000
Subtotal		\$45,670.00000
<input type="checkbox"/> \$57,864.00000 (1)	Price-02	\$34,567.00000
Subtotal		\$34,567.00000
<input type="checkbox"/> \$76,534.00000 (1)	Price-05	\$37,644.00000
Subtotal		\$37,644.00000
<input type="checkbox"/> \$85,535.00000 (1)	Price-08	\$40,857.00000
Row Counts	Detail Rows	Subtotals

Grand Total

Report: Item with Billings

New Item with Billings Report

Total Records: 10

Enable Field Editing Add Chart Edit

Amount ↑	Item Id ↓	Billing Id ↓
<input type="checkbox"/> \$0.00 (1)	Item-08	Billing-06
Subtotal		
<input type="checkbox"/> \$98.75 (1)	Item-02	Billing-03
Subtotal		
<input type="checkbox"/> \$296.00 (1)	Item-09	Billing-04
Subtotal		
<input type="checkbox"/> \$380.24 (1)	Item-04	Billing-07
Subtotal		
<input type="checkbox"/> \$1,164.79 (1)	Item-05	Billing-09
Subtotal		
<input type="checkbox"/> \$2,823.30 (1)	Item-10	Billing-02
Subtotal		
<input type="checkbox"/> \$1,342,349.00 (1)	Item-01	Billing-01
Row Counts	Detail Rows	Subtotals

Grand Total

Report: Billings with Items and Customer Order

Enable Field Editing

Add Chart

10

Item Type	Item Id	Billing Id
Gold (5)	Item-01	Billing-01
	Item-03	Billing-05
	Item-08	Billing-06
	Item-05	Billing-08
	Item-07	Billing-10
Subtotal		
Silver (5)	Item-10	Billing-02
	Item-02	Billing-03
	Item-09	Billing-04
	Item-04	Billing-07
	Item-06	Billing-09
Subtotal		
Total (10)		

Flows:

Project Flow

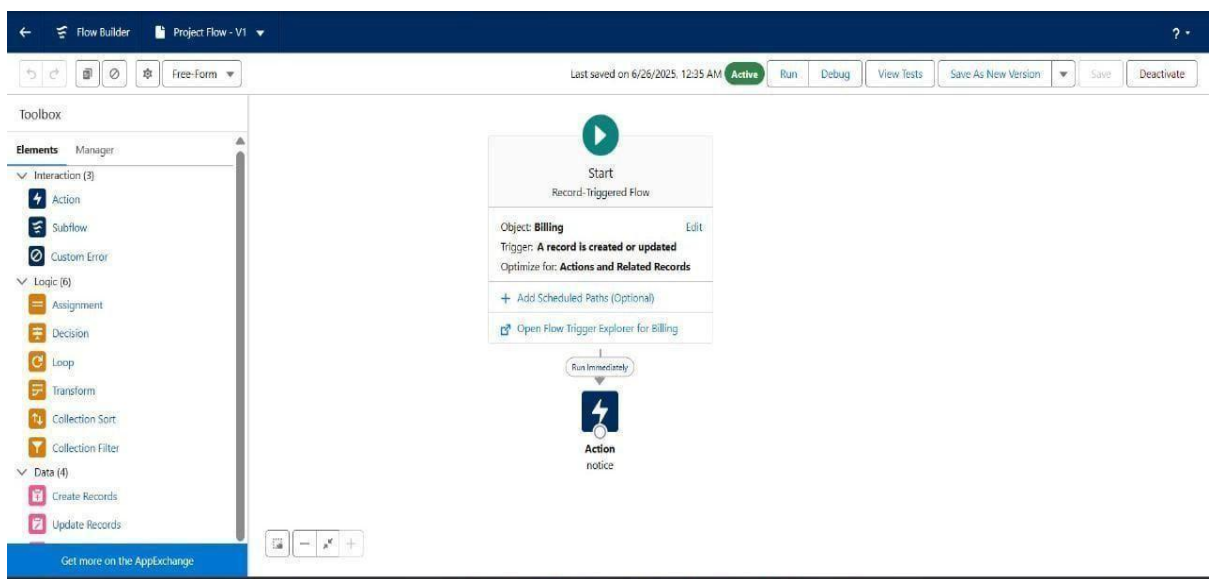
Open Flow Open Latest Version Sharing

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

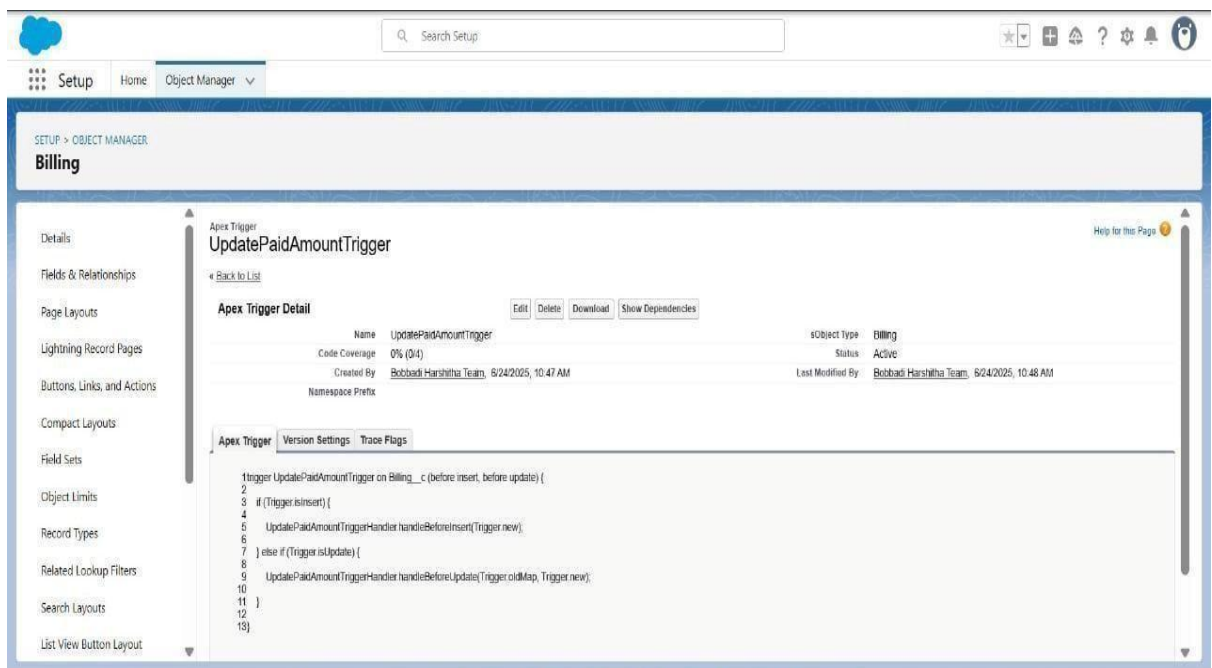
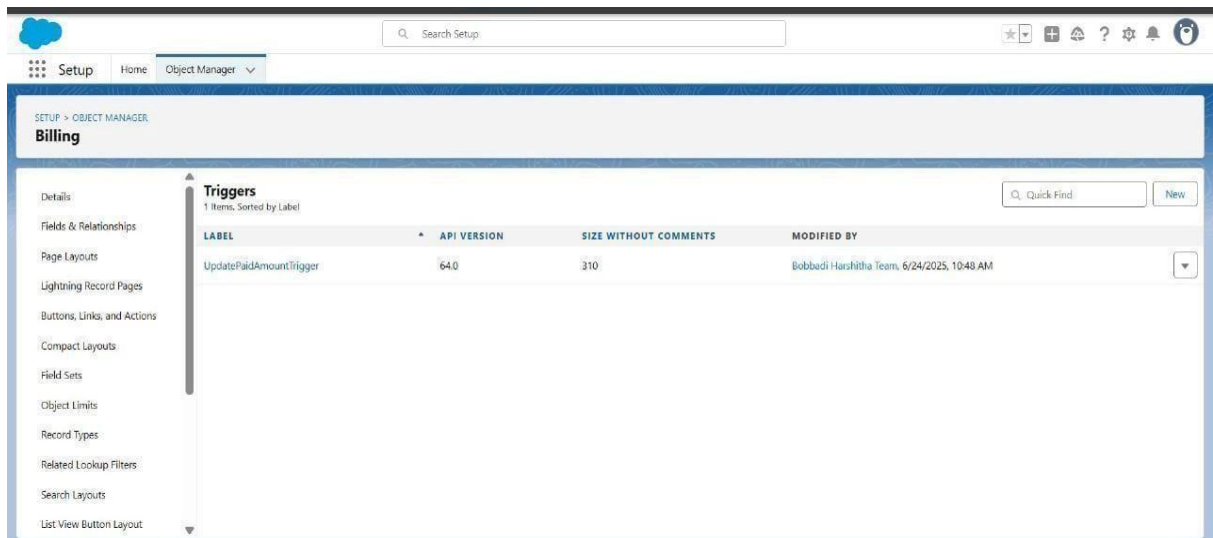
Related Details

Information

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



Triggers:



9 ADVANTAGES AND DISADVANTAGES:

ADVANTAGES:

Automation Efficiency:

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

Centralized Data Handling:

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

Real-Time Analytics:

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

User-Friendly UI:

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

Scalability:

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

. Customer Satisfaction:

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

DISADVANTAGES

Learning Curve:

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

Customization Dependency:

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

Cost Factor:

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

Admin Management:

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

10 CONCLUSION

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

→ Streamlining operations with custom objects and flows

→ Improving business oversight with real-time dashboards

→ Automating repetitive tasks like billing and inventory updates

→ Enhancing data integrity and customer service

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

11 FUTURE SCOPE

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

Payment Gateway Integration:

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

SMS and WhatsApp Alerts:

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

Mobile App Development:

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

Barcode Scanner Support:

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

AI-Based Recommendations:

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

Third-Party Integrations:

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

Multi-Store Management:

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

Customer Feedback System:

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