

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 puritybased 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

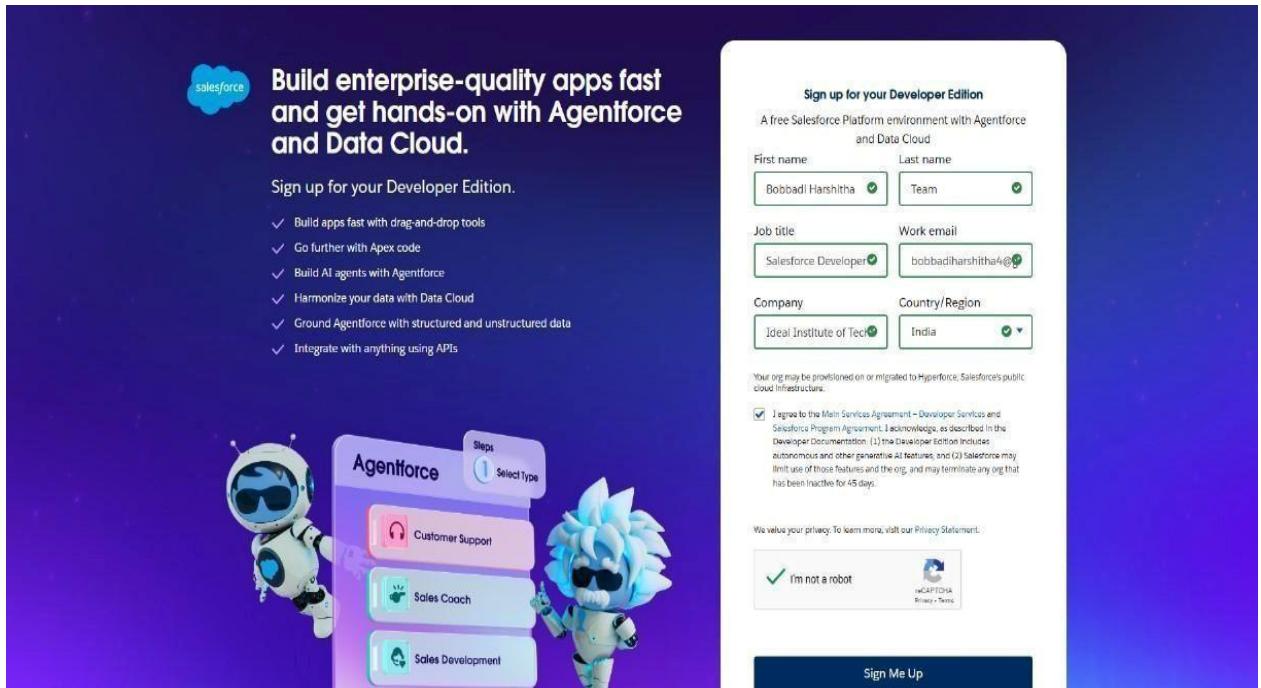
The development phase forms the foundation of the CRM system, where essential features were built using Salesforce's declarative components along with programmatic enhancements when needed. Work was carried out in

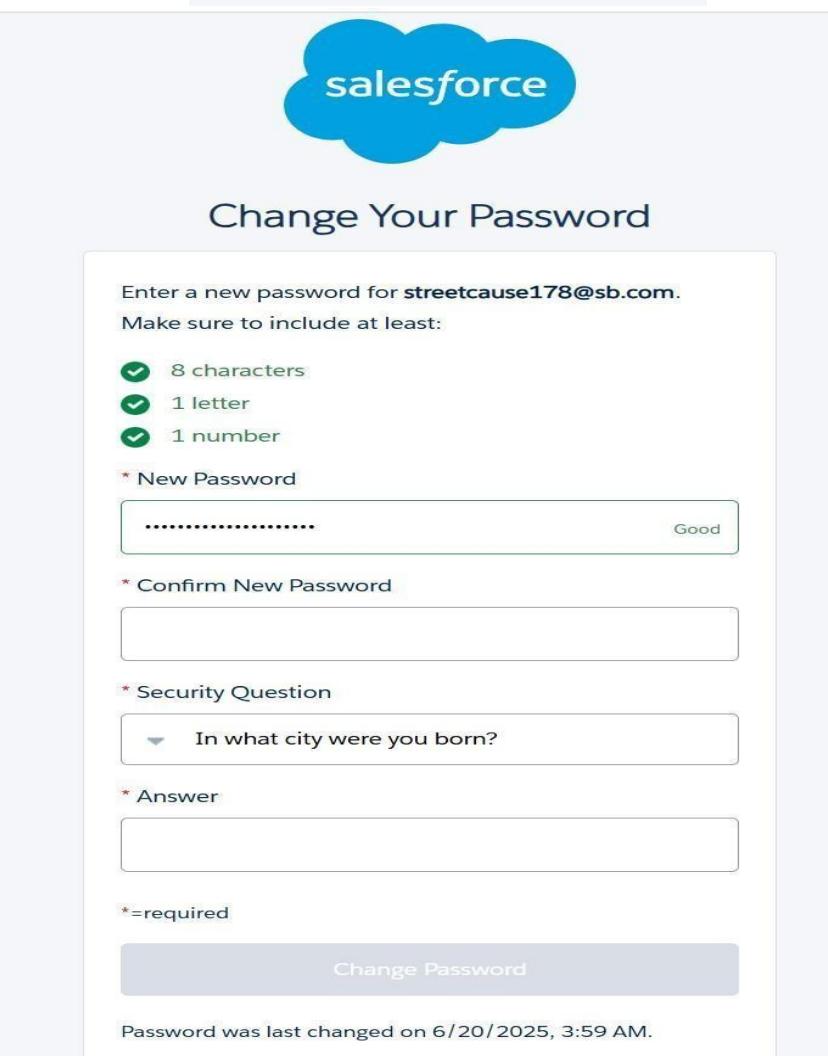
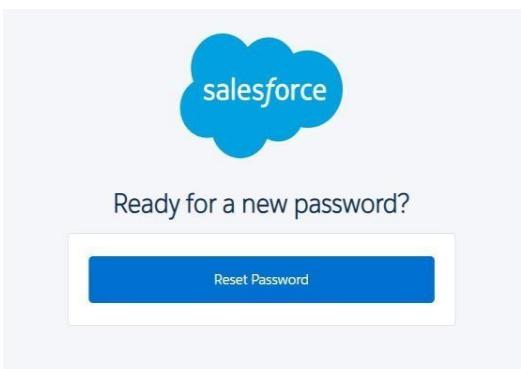
iterative Agile sprints, allowing continuous refinement and faster delivery. This stage was divided into multiple development activities to ensure structured and efficient implementation.

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.





The image shows two screenshots of a Salesforce password management interface. The top screenshot is a 'Reset Password' page with a blue cloud logo and a 'Reset Password' button. The bottom screenshot is a 'Change Your Password' page. It displays a large blue cloud logo and the heading 'Change Your Password'. Below this, it says 'Enter a new password for streetcause178@sb.com.' and 'Make sure to include at least:'. A list of requirements is shown with green checkmarks: '8 characters', '1 letter', and '1 number'. There are two input fields: one for 'New Password' containing '.....' and another for 'Confirm New Password'. Below these is a dropdown for 'Security Question' set to 'In what city were you born?'. There is also an 'Answer' input field. At the bottom of the form is a note '*=required' and a large grey 'Change Password' button. Below the button, a message states 'Password was last changed on 6/20/2025, 3:59 AM.'

Ready for a new password?

Reset Password

salesforce

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right says 'Search Setup'. The main area displays the 'Jewel Customer' object details. On the left, a sidebar lists various configuration tabs: 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, and List View Button Layout. The 'Details' tab is currently active. The main 'Details' section shows the following fields:

- 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

2. Item

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right says 'Search Setup'. The main area displays the 'Item' object details. The left sidebar shows the same list of configuration tabs as the previous screenshot. The 'Details' tab is active. The main 'Details' section shows the following fields:

- 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

3. Customer Order

The screenshot shows the Salesforce Object Manager interface for the 'Customer Order' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Customer Order' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The right panel displays the 'Details' tab for the 'Customer Order' object. It contains fields for Description, API Name (Customer_Order__c), Singular Label (Customer Order), Plural Label (Customer Orders), and several checkboxes for Reports, Activities, and Field History. Deployment status is set to 'Deployed'.

4. Price

The screenshot shows the Salesforce Object Manager interface for the 'Price' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Price' under 'SETUP > OBJECT MANAGER'. The left sidebar lists the same configuration tabs as the previous screenshot. The right panel displays the 'Details' tab for the 'Price' object. It contains fields for Description, API Name (Price__c), Singular Label (Price), Plural Label (Prices), and several checkboxes for Reports, Activities, and Field History. Deployment status is set to 'Deployed'.

5. Billing

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Billing'. On the left, a sidebar lists various configuration options: 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, and List View Button Layout. The main panel displays the 'Details' tab for the Billing object. It contains fields for API Name ('Billing__c'), Singular Label ('Billing'), Plural Label ('Billings'), and other settings like 'Enable Reports' (checked), 'Track Activities', 'Track Field History', 'Deployment Status' ('Deployed'), and 'Help Settings'. At the bottom right are 'Edit' and 'Delete' buttons.

6.3 Creation of Tabs

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

1. Jewel Customer

The screenshot shows the Salesforce Tabs setup page. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > TABS'. The left sidebar shows a search bar for 'tabs' and a section titled 'User Interface' with 'Rename Tabs and Labels' and 'Tabs'. Below that is a message: 'Didn't find what you're looking for? Try using Global Search.' The main panel displays a 'Custom Object Tab' for 'Jewel Customers'. It shows the tab definition detail with 'Tab Label' ('Jewel Customers'), 'Object' ('Jewel Customer'), 'Tab Style' ('Airplane'), and creation details ('Created By: Robbadi Harshitha Team, 6/22/2025, 8:13 AM'). There is also a 'Edit' and 'Delete' button at the top right of the detail card.

2. Item

The screenshot shows the Salesforce Setup interface. In the top left, there's a blue cloud icon labeled "Setup". The top navigation bar includes "Home" and "Object Manager". A search bar says "Search Setup". On the right, there are various icons for help, refresh, and user profile.

The main content area has a sidebar on the left with "User Interface" expanded, showing "Rename Tabs and Labels" and "Tabs" selected. A search bar at the top of the content area says "Q tabs".

The main content area title is "SETUP Tabs". It shows a "Custom Object Tab Items" section. Below it, a note says "Below is the information for the custom tab. Click Edit to change the custom tab." There's a "Custom Tab Definition Detail" table:

Tab Label	Items	Edit	Delete
Object	Item		
Description			
Created By	Robbadi Harshitha Team 6/22/2025, 8:17 AM		
Modified By	Robbadi Harshitha Team 6/22/2025, 8:17 AM		

On the right side of the table, there are "Tab Style" and "Splash Page Custom Link" sections. The "Tab Style" section shows "Alarm clock" with a yellow and purple gradient background. The "Splash Page Custom Link" section shows "Custom Link" with a red background.

3. Customer Order

This screenshot is similar to the previous one but shows a different custom tab. The sidebar and search bar are identical.

The main content area title is "SETUP Tabs". It shows a "Custom Object Tab Customer Orders" section. Below it, a note says "Below is the information for the custom tab. Click Edit to change the custom tab." There's a "Custom Tab Definition Detail" table:

Tab Label	Customer Orders	Edit	Delete
Object	Customer Order		
Description			
Created By	Robbadi Harshitha Team 6/22/2025, 8:19 AM		
Modified By	Robbadi Harshitha Team 6/22/2025, 8:19 AM		

On the right side of the table, there are "Tab Style" and "Splash Page Custom Link" sections. The "Tab Style" section shows "Bell" with a yellow and red gradient background. The "Splash Page Custom Link" section shows "Custom Link" with a red background.

4. Price

5. Billing

The screenshot shows the Salesforce Setup interface. In the top left, there's a blue cloud icon, followed by 'Setup', 'Home', and 'Object Manager'. A search bar says 'Search Setup' with a magnifying glass icon. On the right, there are various icons for help, refresh, and notifications.

The main area has a sidebar on the left with 'User Interface' expanded, showing 'Rename Tabs and Labels' and 'Tabs' selected. Below it, a message says 'Didn't find what you're looking for? Try using Global Search.'.

The main content area has a title 'SETUP Tabs'. It shows a 'Custom Object Tab' named 'Prices'. Below it, a note says 'Below is the information for the custom tab. Click Edit to change the custom tab.'.

A 'Custom Tab Definition Detail' table is shown:

Tab Label	Prices	Tab Style	Fan		
Object	Price	Splash Page Custom Link			
Description					
Created By	Bobbadil Harshitha Team	6/22/2025, 6:20 AM	Modified By	Bobbadil 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 again. The sidebar on the left shows 'User Interface' expanded, with 'Custom Tabs' selected under 'Rename Tabs and Labels'. A message at the bottom says 'Didn't find what you're looking for? Try using Global Search.'.

The main content area has a title 'SETUP Tabs' and a section 'Custom Tabs'. It says 'You can create new custom tabs to extend Salesforce functionality or to build new application functionality.' Below it, a note says 'Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.'.

Two sections are shown:

- Custom Object Tabs**: A table with columns 'Action', 'Label', 'Tab Style', and 'Description'. The data is:

Action	Label	Tab Style	Description
Edit Del	Billing	Boat	
Edit Del	Customer Orders	Bell	
Edit Del	Items	Alarm clock	
Edit Del	Jewel Customers	Airplane	
Edit Del	Prices	Fan	

- Web Tabs**: A table with a single row: 'No Web Tabs have been defined'.

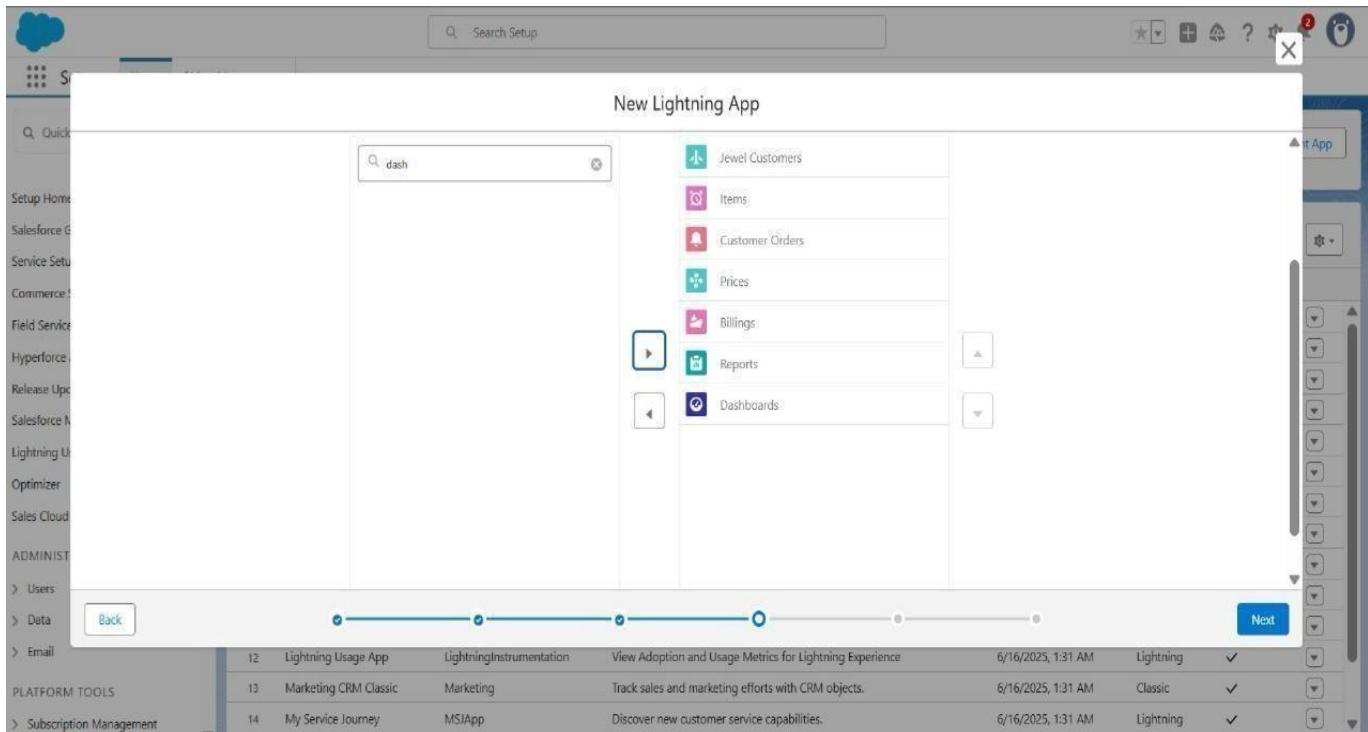
6.4 Creation of Lightning App

App Name: Jewelry Inventory System

The screenshot shows the 'App Settings' section of the Lightning App Builder. The 'App Details & Branding' tab is selected. On the left, a sidebar lists options like App Options, Utility Items (Desktop Only), Navigation Items, Navigation Rules, and User Profiles. The main area contains fields for 'App Name' (jewelry Inventory System), 'Developer Name' (jewelry_Inventory_System), and a 'Description' (Elevate your look with elegance). It also includes sections for 'App Branding' (with an 'Image' field showing a placeholder and a 'Primary Color Hex Value' of #0070D2), 'Org Theme Options' (unchecked), and an 'App Launcher Preview' showing the app icon and name.

The screenshot shows the 'App Options' step of a setup wizard titled 'New Lightning App'. The 'Navigation and Form Factor' section includes 'Navigation Style' (Console navigation selected) and 'Supported Form Factors' (Desktop and phone selected). The 'Setup and Personalization' section includes 'Setup Experience' (Setup (full set of Setup options) selected), 'App Personalization Settings' (checkboxes for disabling end user personalization, clearing workspace tabs, and using Omni-Channel sidebar), and a progress bar at the bottom. A 'Back' button is visible on the left, and a 'Next' button is on the right.

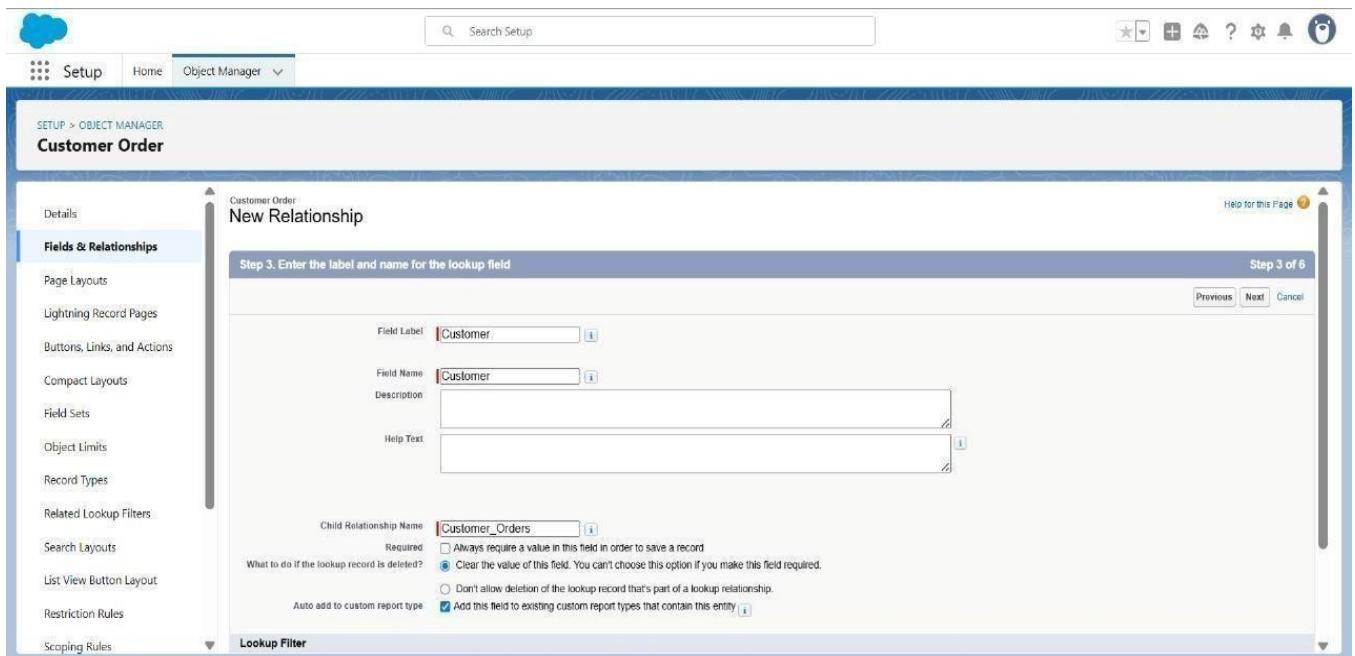
Navigation Items



6.5 Creation of Fields

1. Creating lookup relationship

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



The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar lists various object management options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "Customer Order New Relationship". Step 6 of 6 is displayed, titled "Add custom related lists". A table shows a single entry: Field Label: Customer, Data Type: Lookup, Field Name: Customer. Below this, a note says "Specify the title that the related list will have in all of the layouts associated with the parent." A text input field contains "Customer Orders". A note below says "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." A checkbox "Add Related List" is checked, and a dropdown "Page Layout Name" shows "Jewel Customer Layout". Another checkbox "Append related list to users' existing personal customizations" is checked. At the bottom are "Previous", "Save & New", "Save", and "Cancel" buttons.

2. Creating a Master-Detail Relationship

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

The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar lists various object management options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "Customer Order New Relationship". Step 5 of 6 is displayed, titled "Add reference field to Page Layouts". A table shows a single entry: Field Label: Item, Data Type: Master-Detail, Field Name: Item. Below this, a note says "These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required." A checkbox "Add Field" is checked, and a dropdown "Page Layout Name" shows "Customer Order Layout". At the bottom are "Previous", "Next", and "Cancel" buttons.

The screenshot shows the Salesforce Setup interface under the Object Manager section for the 'Customer Order' object. On the left, a sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The 'Fields & Relationships' tab is selected. In the main area, a 'New Relationship' dialog is open, titled 'Customer Order - New Relationship'. It's Step 6 of 6, titled 'Add custom related lists'. The configuration details are as follows:

- Field Label: Item
- Data Type: Master-Detail
- Field Name: Item
- Description: (empty)
- Related List Label: Customer Orders
- Add Related List: Page Layout Name: Item Layout (checkbox checked)
- Append related list to users' existing personal customizations (checkbox checked)

At the bottom right of the dialog are buttons for Previous, Save & New, Save, and Cancel.

3. Creating Text Field in Jewel Customer Object

The screenshot shows the Salesforce Setup interface under the Object Manager section for the 'Jewel Customer' object. On the left, a sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The 'Fields & Relationships' tab is selected. In the main area, a 'New Custom Field' dialog is open, titled 'Jewel Customer - New Custom Field'. It's Step 2 of 4, titled 'Enter the details'. The configuration details are as follows:

- Field Label: City
- Length: 20
- Field Name: City
- Description: (empty)
- Help Text: (empty)
- 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 different 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

At the bottom right of the dialog are buttons for Previous, Next, and Cancel.

The screenshot shows the Salesforce Setup interface for creating a new custom field named 'City' for the 'Jewel Customer' object. The 'Fields & Relationships' tab is selected. Step 4 of 4 is shown, titled 'Add to page layouts'. The field details are: Field Label: City, Data Type: Text, Field Name: City. Under 'Page Layouts', 'Jewel Customer Layout' is selected. The status bar indicates 'Step 4 of 4'.

4. Creating the Phone field in object Jewel Customer

The screenshot shows the Salesforce Setup interface for creating a new custom field named 'Phone' for the 'Jewel Customer' object. The 'Fields & Relationships' tab is selected. Step 4 of 4 is shown, titled 'Add to page layouts'. The field details are: Field Label: Phone, Data Type: Phone, Field Name: Phone. Under 'Page Layouts', 'Jewel Customer Layout' is selected. The status bar indicates 'Step 4 of 4'.

5. Creating the Email field in object Jewel Customer

The screenshot shows the Salesforce Setup interface for creating a new custom field. The object is 'Jewel Customer'. The field name is 'Email', and its type is 'Email'. It is being added to the 'Jewel Customer Layout'. The interface includes a sidebar with various layout options like Page Layouts, Lightning Record Pages, and Compact Layouts.

6. Creating the number field in Item object

The screenshot shows the Salesforce Setup interface for creating a new custom field. The object is 'Item'. The field name is 'Purity', and its type is 'Number'. It is being added to the 'Item Layout'. The interface includes a sidebar with various layout options like Page Layouts, Lightning Record Pages, and Compact Layouts.

7. Creating Picklist Field in Item Object

SETUP > OBJECT MANAGER

Item

Fields & Relationships

New Custom Field

Step 4. Add to page layouts

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.

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

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

Step 4 of 4

Previous Save & New Save Cancel

8. Creating Currency Field in Price Object

SETUP > OBJECT MANAGER

Price

Fields & Relationships

New Custom Field

Step 3. Establish field-level security

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	Visible	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"/>

Step 3 of 4

Previous Next Cancel

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

The screenshot shows the Salesforce Setup interface for creating a new field. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Item' under 'Object Manager'. A formula editor is open, showing the formula `Gold Price (Currency) =` and a dropdown menu with operators and functions. The formula bar includes 'Simple Formula' and 'Advanced Formula' tabs, and an 'Insert Field' button.

The screenshot shows the continuation of creating a new custom field. The left sidebar remains the same. The main area is titled 'New Custom Field' under 'Step 5. Add to page layouts'. It shows the field details: Field Label 'Gold Price', Data Type 'Formula', Field Name 'Gold_Price', and a Description section. Below this, it asks to select page layouts for the field. Two checkboxes are checked: 'Add Field' (with 'Page Layout Name') and 'Item Layout'. At the bottom, there's a note about saving and finishing the process.

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

Fields & Relationships
11 items. Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Country	Country__c	Text(10)		
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

Fields & Relationships
6 items. Sorted by Field Label

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 > Object Manager

Item

Fields & Relationships
23 Items. Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Created By	CreatedBy	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 > Object Manager

Customer Order

Fields & Relationships
6 Items. Sorted by Field Label

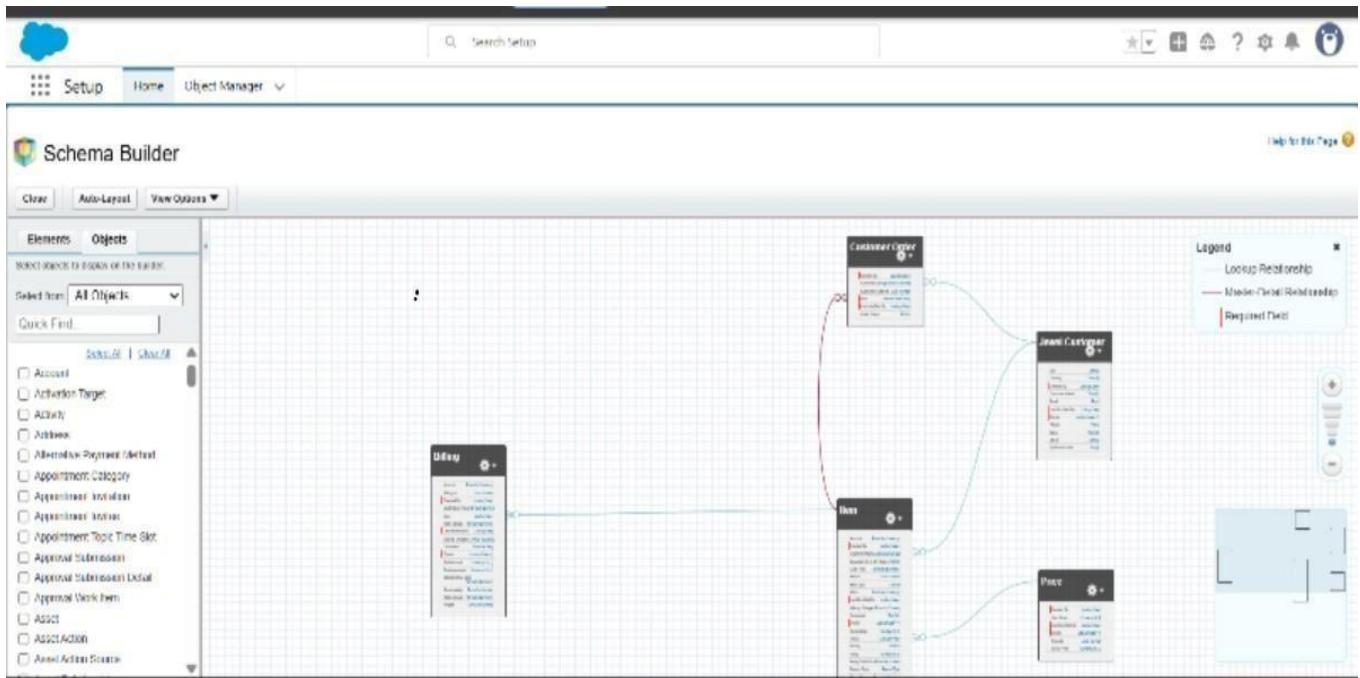
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Customer	Customer_c	Lookup(Jewel Customer)		✓
Customer Order Id	Name	Auto Number		✓
Item	Item_c	Master-Detail(Item)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Order Status	Order_Status_c	Picklist		

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The page title is 'Billing'. On the left, a sidebar lists various setup categories like Details, Page Layouts, Lightning Record Pages, etc. The main content area is titled 'Fields & Relationships' and displays a table of 16 items sorted by Field Label. The columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table includes fields such as Amount, Name, Created By, Gold/Silver Price, Item, KDM Charge, Last Modified By, and Making Charges.

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

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

13. Creation of Validation Rules

The screenshot shows the 'Jewel Customer' object in the Salesforce Object Manager. On the left, a sidebar lists various configuration options: 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, and List View Button Layout. The 'Validation Rule Detail' section is selected. The validation rule is named 'Postal_Code'. The error condition formula is set to AND, with the following logic:
LEN(Zip_Postal_code__c) <= 6,
NOT(REGEX(Zip_Postal_code__c, "[0-9]{6}"))
),
NOT(ISBLANK(Zip_Postal_code__c))
).
The error message is 'Must contain 6 digits'. The error location is 'Zip/Postal code'. The rule was created by 'Bobbadil Harshitha Team' on 6/23/2025, 6:58 AM, and modified by the same team on 6/23/2025, 6:58 AM.

This screenshot shows a second validation rule for the 'Jewel Customer' object. The sidebar and basic structure are identical to the first screenshot. The validation rule is named 'ValidationRule_For_JewelCustomerObject'. The error condition formula is set to OR, with the following logic:
ISBLANK(City__c) , ISBLANK(Country__c) , ISBLANK(Phone__c) , ISBLANK(State__c) , ISBLANK(Street__c)).
The error message is 'Please fill Required fields'. The error location is 'Top of Page'. The rule was created by 'Bobbadil Harshitha Team' on 6/23/2025, 7:00 AM, and modified by the same team on 6/23/2025, 7:00 AM.

6.6 Creation of Profiles

We create the goldsmith profile and the worker profile

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The search bar at the top contains 'profiles'. The main content area displays the 'Worker Profile' details. The profile name is 'Worker Profile', user license is 'Salesforce Platform', and it is a 'Custom Profile' (indicated by a checked checkbox). The 'Profile Detail' section includes fields for Name, User License, Description, Created By, Modified By, and various permissions listed below. The 'Page Layouts' section shows assignments for Standard Object Layouts like Global, Email Application, Home Page Layout, and Account. A detailed table follows:

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

6.7 Creation of Roles

The screenshot shows the Salesforce Setup interface with the 'Roles' tab selected. The search bar at the top contains 'roles'. The left sidebar shows navigation categories: 'Users' (selected), 'Feature Settings', 'Sales' (with 'Contact Roles on Contracts' and 'Contact Roles on Opportunities'), 'Service' (with 'Case Teams' and 'Case Team Roles'), and 'Cases' (with 'Contact Roles on Cases'). A note at the bottom says 'Didn't find what you're looking for? Try using Global Search.' The main content area displays a hierarchical list of roles under 'Ideal Institute of Technology': CEO, CFO, COO, Gold Smith, Worker, SVP, Customer Service & Support, Customer Support, International, and Customer Support, North America. Each role has 'Edit | Del | Assign' options.

6.8 Creation of Users

The screenshot shows the Salesforce Setup interface. The left sidebar has a tree view with 'Optimizer', 'Sales Cloud Everywhere', and 'ADMINISTRATION' expanded. Under 'ADMINISTRATION', 'Users' is selected, which further expands to show 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. The 'Users' item is highlighted with a blue selection bar. The main content area is titled 'SETUP Users' and shows a table of 'All Users'. The table has columns for 'Action', 'Full Name', 'Alias', 'Username', 'Role', 'Active', and 'Profile'. The data includes:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter_Pinger	Chatter	chatty.00dg000000vnguo.apzrcsupomm@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	OEPIC_OrgFarm	OEPIC	oeptic.11b2397af52.orgfarm.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Mikaelson_Kol	Mikael	mikael@gmail.com	Worker	<input checked="" type="checkbox"/>	Worker Profile
<input type="checkbox"/> Edit	Mikaelson_Niklaus	Niklaus	niklaus@gmail.com	Gold Smith	<input checked="" type="checkbox"/>	Gold Smith
<input type="checkbox"/> Edit	Team_Bobbadil_Harshitha	bob	bobbadilharshitha1974@genforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@000dg000000vnguo.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightsecurity@000dg000000vnguo.com		<input checked="" type="checkbox"/>	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. The left sidebar has a tree view with 'Optimizer', 'Sales Cloud Everywhere', and 'OBJECT MANAGER' expanded. Under 'OBJECT MANAGER', 'Item' is selected. The main content area is titled 'SETUP > OBJECT MANAGER Item'. The top navigation bar includes 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. The 'Fields' section is selected in the sidebar. The main area shows a 'Page Layout for Gold' configuration screen. It includes a 'Fields' list (Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, Report Charts), a 'Layout Properties' tab, a 'Quick Find' field, a table of fields with columns like 'Section', 'Customer Name', 'Item Type', 'Ornament', 'Priority', 'Silver Price', and 'Weight', and sections for 'Item Sample', 'Highlights Panel', 'Quick Actions in the Salesforce Classic Publisher', and 'Salesforce Mobile and Lightning Experience Actions'.

6.9 Creation of Record Types

We create the gold an silver records

The screenshot shows the Salesforce Object Manager interface for creating Record Types. The left sidebar lists various layout types, with 'Record Types' selected. The main area displays a table titled 'Record Types' with two items: 'Gold' and 'Silver'. The 'Gold' record has a description of 'Gold items information' and was modified by 'Bobbadi Harshitha Team' on 6/25/2025, 4:27 AM. The 'Silver' record has a description of 'Silver items information' and was modified by 'Bobbadi Harshitha Team' on 6/23/2025, 12:15 PM.

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 page for creating a new permission set. The left sidebar shows 'Permission Sets' is selected. The main area displays a table for the 'Per to Worker' permission set. The table includes fields for Description, License, Session Activation Required, and Permission Set Groups Added To. The API Name is 'Per_to_Worker', Namespace Prefix is 'Bobbadi Harshitha Team', and it was created on 6/23/2025, 12:18 PM by 'Bobbadi Harshitha Team'. Last modified on 6/23/2025, 12:22 PM by 'Bobbadi Harshitha Team'. The 'Apps' section lists 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', and 'Apex Class Access'.

Description	API Name	Namespace Prefix
License	Per_to_Worker	Bobbadi Harshitha Team
Session Activation Required		Created By: Bobbadi Harshitha Team, 6/23/2025, 12:18 PM
Permission Set Groups Added To	0	Last Modified By: Bobbadi Harshitha Team, 6/23/2025, 12:22 PM

6.11 Creation of Trigger

The screenshot shows the Salesforce IDE interface. The main window displays the Apex class `UpdatePaidAmountTriggerHandler`. The code implements a trigger handler for the `Billing__c` object, specifically for the `before insert` and `before update` events. It iterates through a list of new billings and updates the `Paid_Amount__c` field to match the `Paying_Amount__c` field.

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

The screenshot shows the Salesforce IDE interface. The main window displays the trigger definition `UpdatePaidAmountTrigger.apxt`. The trigger is named `UpdatePaidAmountTrigger` and is defined on the `Billing__c` object. It handles the `before insert` and `before update` events. The logic is identical to the Apex class shown above, calling the `handleBeforeInsert` and `handleBeforeUpdate` methods of the `UpdatePaidAmountTriggerHandler` class.

```
1 trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {  
2     if (Trigger.isInsert) {  
3         UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);  
4     } else if (Trigger.isUpdate) {  
5         UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap, Trigger.new);  
6     }  
7 }
```

6.12 Creation of User Adoption

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

The screenshot shows a Microsoft Dynamics 365 interface for a 'Prices' list. At the top, there's a navigation bar with a cloud icon, the title 'jewelry Inventory Sy...', a 'Prices' tab, and a search bar. Below the navigation is a header bar with 'Recently Viewed' and a download icon. A message indicates '10 items • Updated a few seconds ago'. The main area displays a table with columns for 'Price Id' (checkbox) and 'Name'. The data is as follows:

	Price Id
1	Price-10
2	Price-09
3	Price-08
4	Price-07
5	Price-06
6	Price-05
7	Price-04
8	Price-03
9	Price-02
10	Price-01

At the bottom right, there are buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. A 'Search this list...' bar is also present.

The screenshot shows a Microsoft Dynamics 365 interface for a 'Jewel Customers' list. At the top, there's a navigation bar with a cloud icon, the title 'jewelry Inventory Sy...', a 'Jewel Customers' tab, and a search bar. Below the navigation is a header bar with 'Recently Viewed' and a download icon. A message indicates '10 items • Updated a few seconds ago'. The main area displays a table with columns for 'Customer Name' (checkbox) and 'Name'. The data is as follows:

	Customer Name
1	Arjun
2	Joshna
3	Anand
4	Krishna
5	Sita
6	Nani
7	Shyamala
8	Manasa
9	Ravi
10	Devi

At the bottom right, there are buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. A 'Search this list...' bar is also present.

6.13 Creation of Reports

The screenshot shows the 'Reports' section of the jewelry Inventory System. On the left, there's a sidebar with categories: REPORTS, FOLDERS, and FAVORITES. Under REPORTS, 'Recent' is selected, showing three items: 'Billings with Items and Customer Order', 'New Item with Billings Report', and 'New Prices Report'. Each item has a 'View Report' link. The main area displays a table with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The first row is highlighted in blue.

Report Name	Description	Folder	Created By	Created On	Subscribed
Billings with Items and Customer Order	Private Reports	Bobbadli Harshitha Team	6/25/2025, 10:44 AM		
New Item with Billings Report	Private Reports	Bobbadli Harshitha Team	6/25/2025, 10:43 AM		
New Prices Report	Private Reports	Bobbadli Harshitha Team	6/25/2025, 9:56 AM		

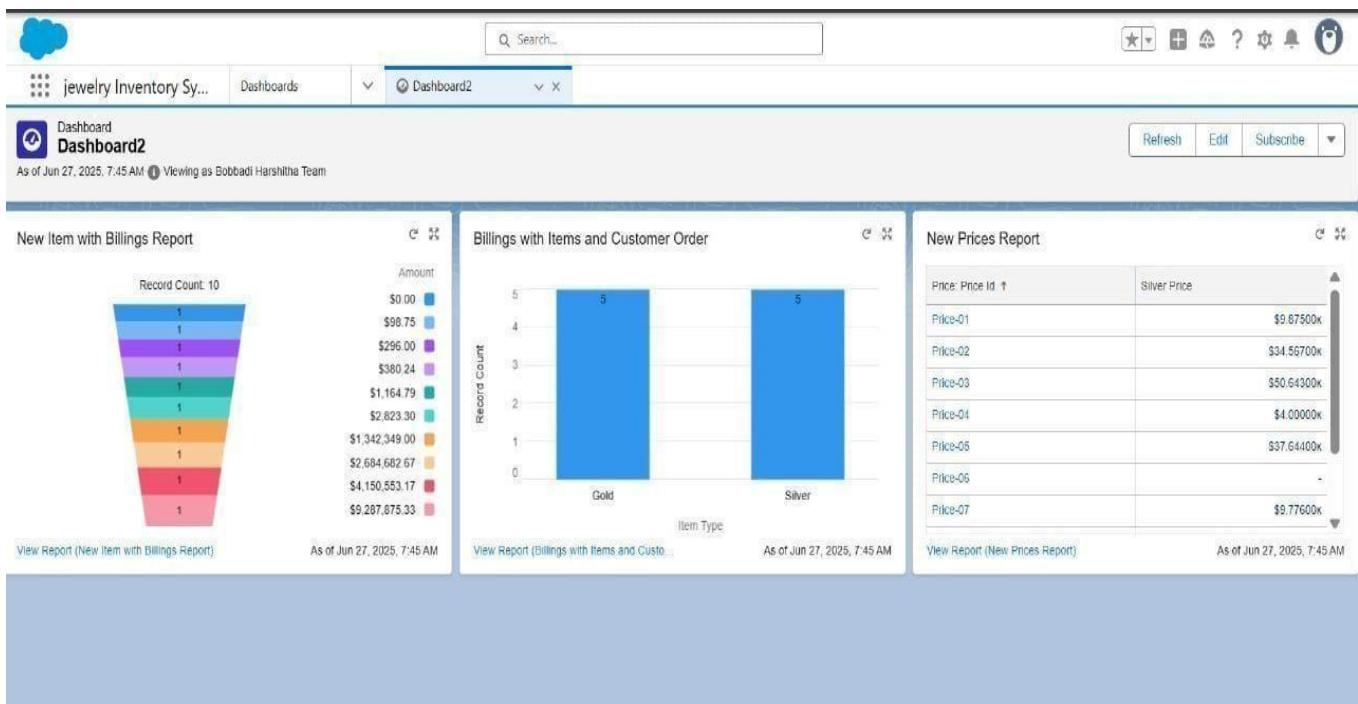
6.14 Creation of Dashboards

Dashboard 1

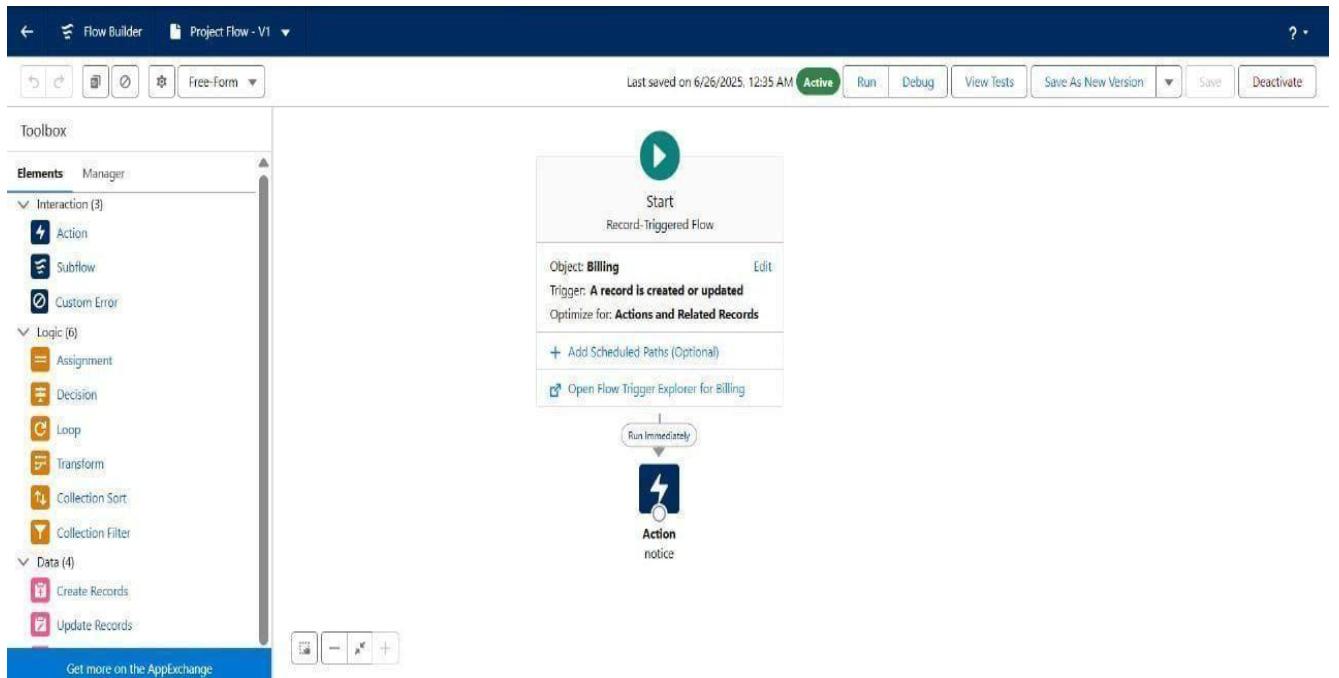
The screenshot shows 'Dashboard 1' with three cards:

- New Item with Billings Report:** A donut chart titled 'Record Count' with segments labeled 1, 1, 1, 1, 10, and 1. Below it is a table of 'Amount' values: \$0.00, \$98.75, \$296.00, \$380.24, \$1,164.79, and \$2,823.30.
- Billings with Items and Customer Order:** A bar chart titled 'Record count' showing 5 for Gold and 5 for Silver.
- New Prices Report:** A treemap chart titled 'Sum of Silver Price: \$132k' with segments labeled '\$46k', '\$35k', and '\$38k'. A legend on the right shows 'Gold Price' with values: \$5,000.00000, \$24,780.00000, \$56,907.00000, \$57,864.00000, and \$76,534.00000.

Dashboard 2

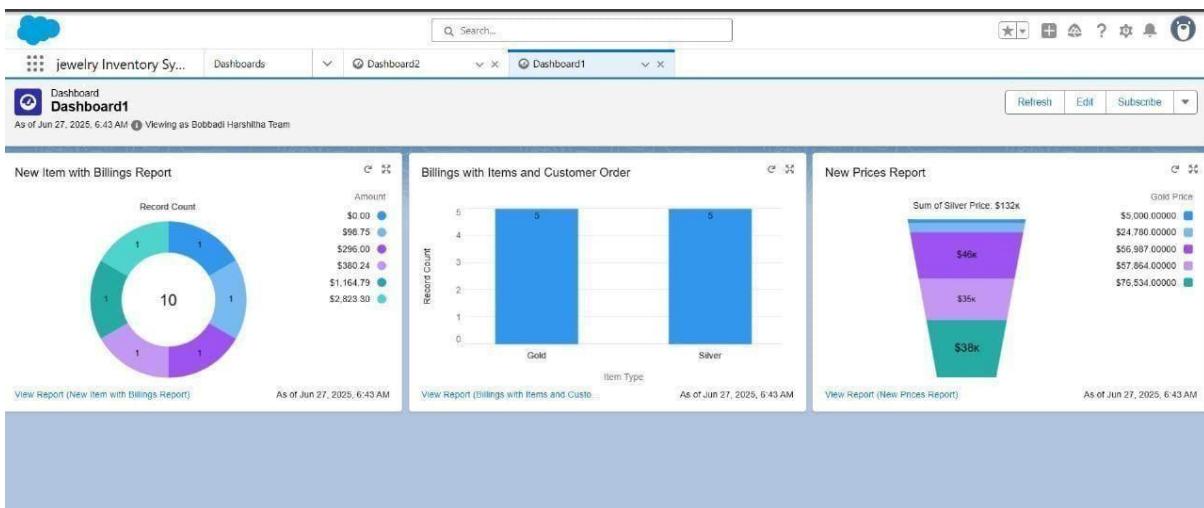


6.15 Creation of Flows



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

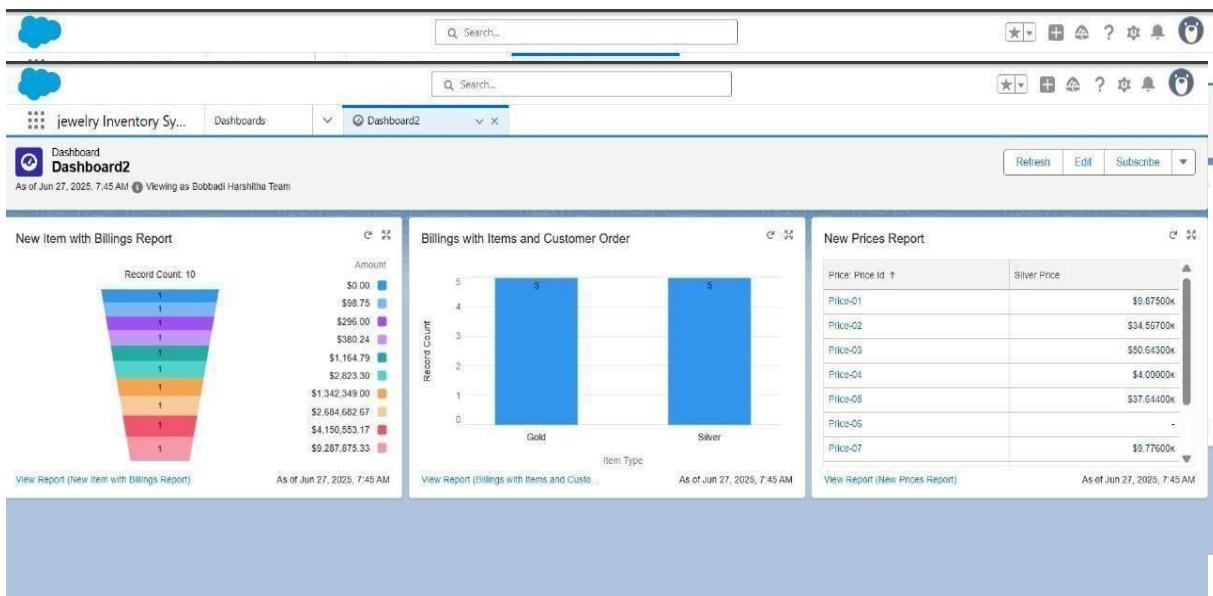
- **Stock Reorder Requests**

- Approval triggered when reorder level is reached

- **Notifications**

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

Dashboards:



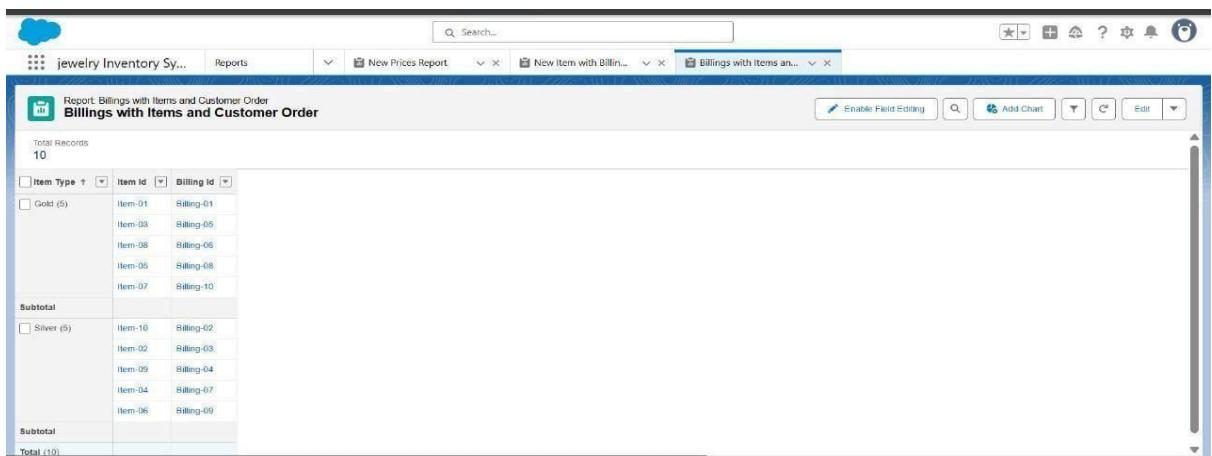
Reports:

Report: Prices New Prices Report

Total Records	Total Silver Price		
10	\$642,908.00000		
<input type="checkbox"/> Gold Price ↑ <input type="checkbox"/> Price: Price Id ↴ <input type="checkbox"/> Silver Price ↴			
Subtotal			
□ \$0.00000000 (1)	Price-08		
Subtotal	\$0.000000		
□ \$5,000.00000 (1)	Price-04		
Subtotal	\$4,000.00000		
□ \$24,780.00000 (1)	Price-01		
Subtotal	\$9,875.00000		
□ \$65,987.00000 (1)	Price-09		
Subtotal	\$46,670.00000		
□ \$67,864.00000 (1)	Price-02		
Subtotal	\$34,567.00000		
□ \$76,534.00000 (1)	Price-06		
Subtotal	\$37,644.00000		
□ \$88,533.00000 (1)	Price-08		
Row Counts	Detail Rows	Subtotals	Grand Total

Report: Item with Billings New Item with Billings Report

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



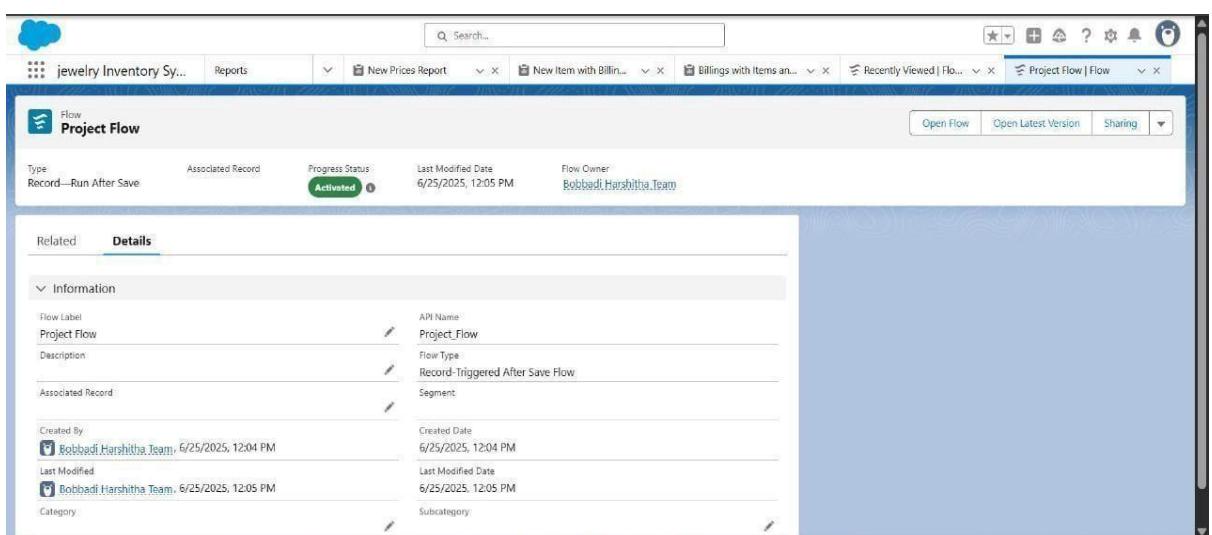
Report: Billings with Items and Customer Order

Billings with Items and Customer Order

Total Records: 10

Item Type	Item Id	Billing Id
Gold (5)	Item-01	Billing-01
	Item-03	Billing-05
	Item-06	Billing-06
	Item-08	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:



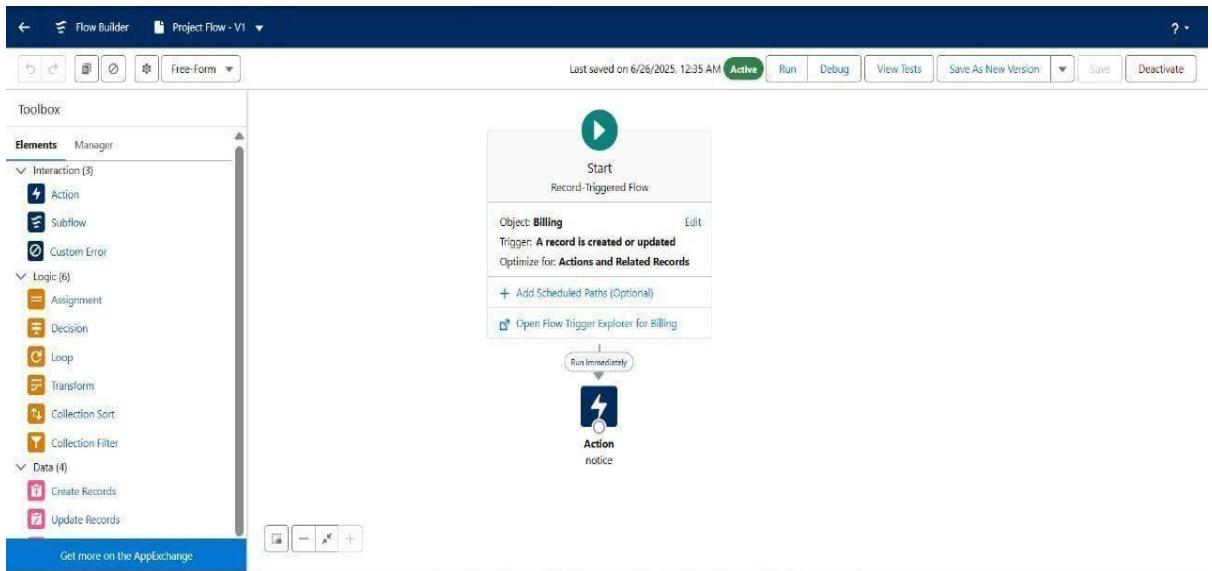
Flow
Project Flow

Type: Record—Run After Save
Associated Record: **Activated**
Progress Status: **Active**
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 By: Bobbadi Harshitha Team, 6/25/2025, 12:05 PM	Last Modified Date: 6/25/2025, 12:05 PM
Category:	Subcategory:



Flow Builder **Project Flow - V1**

Last saved on 6/26/2025, 12:35 AM **Active** Run Debug View Tests Save As New Version Save Deactivate

Toolbox

- Elements Manager**
- Interaction (3)**
 - Action
 - Subflow
 - Custom Error
- Logic (6)**
 - Assignment
 - Decision
 - Loop
 - Transform
 - Collection Sort
 - Collection Filter
- Data (4)**
 - Create Records
 - Update Records

Start
Record-Triggered Flow

Object: Billing
Trigger: A record is created or updated
Optimize for: Actions and Related Records

Action notice

Run Immediately

Triggers:

SETUP > OBJECT MANAGER
Billing

Triggers
1 items, Sorted by Label

LABEL	API VERSION	SIZE WITHOUT COMMENTS	MODIFIED BY
UpdatePaidAmountTrigger	64.0	310	Bobbadi Harshitha Team, 6/24/2025, 10:48 AM

SETUP > OBJECT MANAGER
Billing

Apex Trigger
UpdatePaidAmountTrigger

Apex Trigger Detail

Name: UpdatePaidAmountTrigger	Object Type: Billing
Code Coverage: 0% (0/4)	Status: Active
Created By: Bobbadi Harshitha Team, 6/24/2025, 10:47 AM	Last Modified By: Bobbadi Harshitha Team, 6/24/2025, 10:48 AM
Namespace Prefix:	

Apex Trigger Version Settings Trace Flags

```
1 trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {  
2     if (Trigger.isInsert) {  
3         UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);  
4     } else if (Trigger.isUpdate) {  
5         UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap, Trigger.new);  
6     }  
7 }
```

9 ADVANTAGES AND DISADVANTAGES:

ADVANTAGES:

Automation Efficiency:

All critical operations 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.