

NAAN MUDHULVAN
CRM APPLICATION FOR JEWEL MANAGEMENT

College Name : St.Joseph's College for women Tirupur

III-B.Sc.Computer Science

TEAM MEMBERS:

Kavyashree.J

Aashima Parveen.A.R

Avanthika.R

Ismath Fathima.A

Punashree Boyar.S

OBJECT:

Create Jewel Customer Object:

[illegible]

Create Item Object:

Setup

Home

Object Manager ▾

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

Details

Description

API Name
Item__c

Custom
✓

Singular Label
Item

Plural Label
Items

Enable Reports
✓

Track Activities

Track Field History

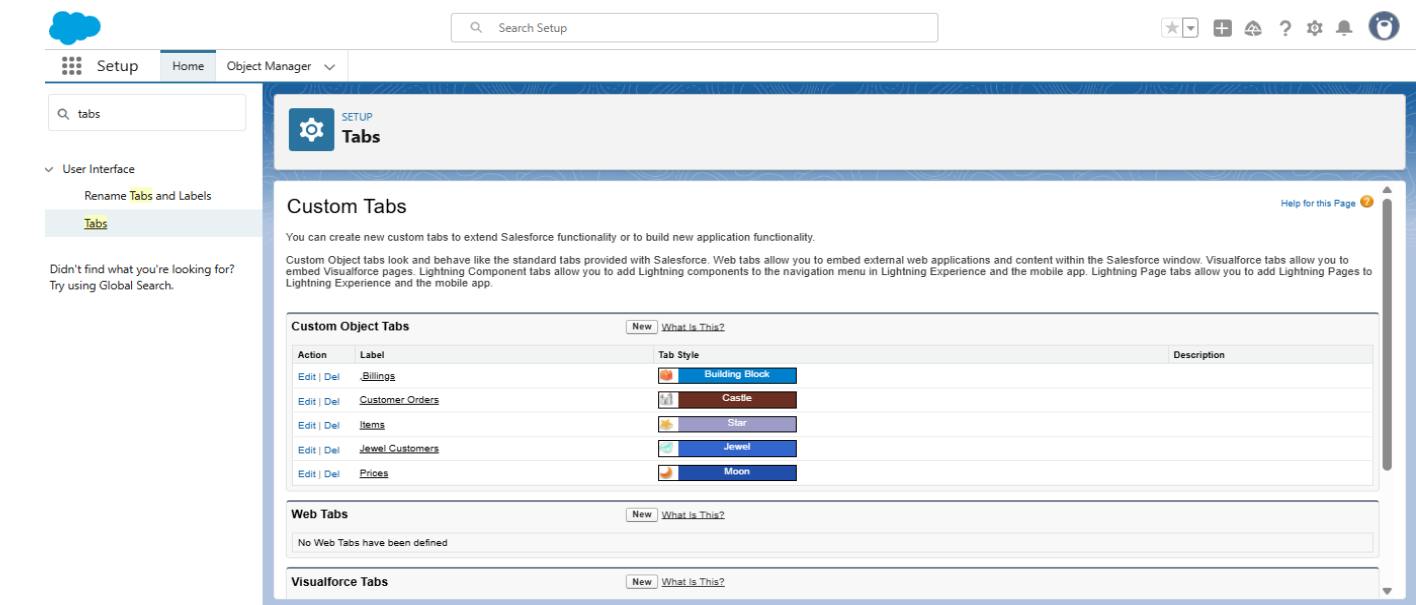
Deployment Status
Deployed

Help Settings
[Standard salesforce.com Help Window](#)

EditDelete

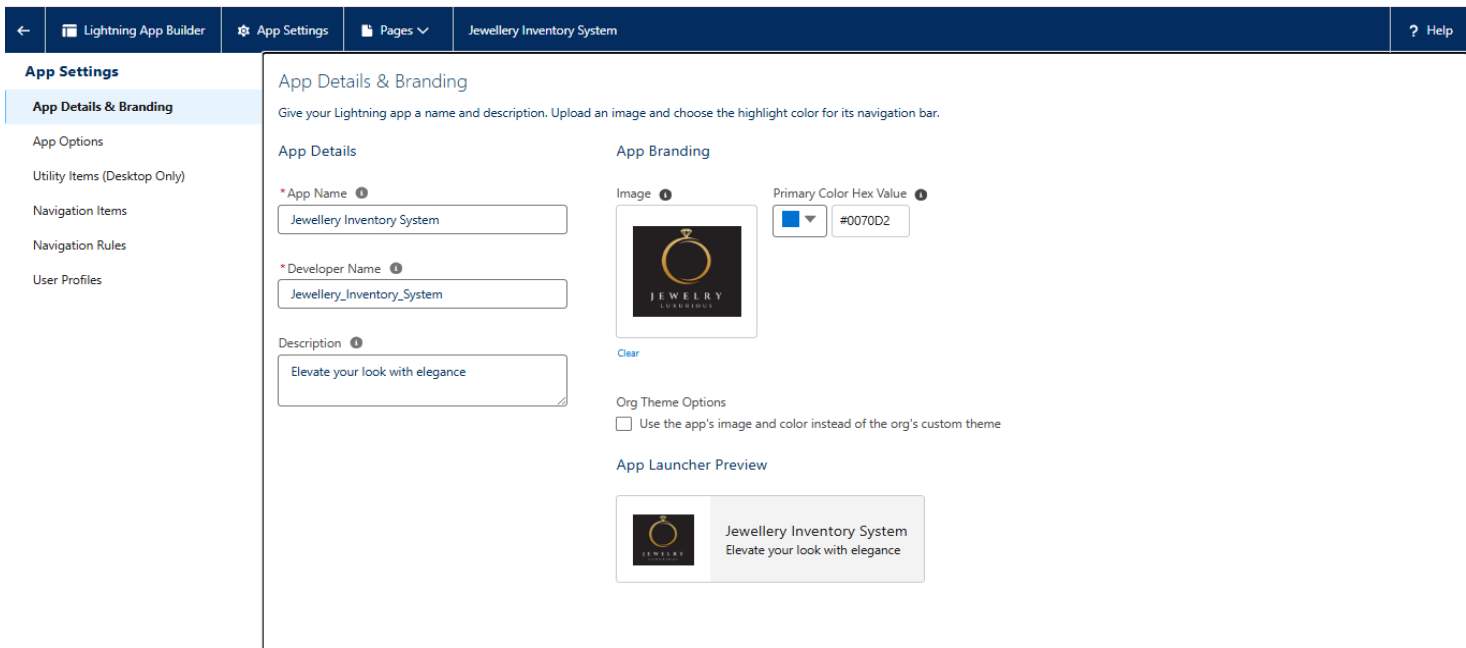
TABS:

Creating a Tab:



The Lightning App

Creating a Lightning App:



App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

Navigation Rules

User Profiles

Utility Items (Desktop Only)

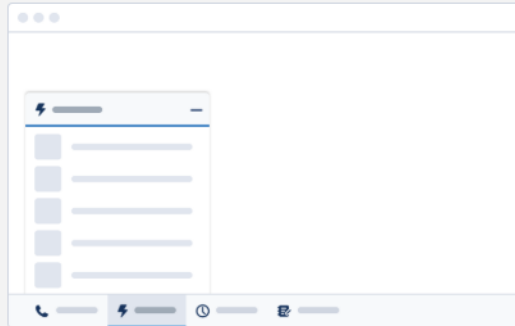
Give your users quick access to productivity tools and add background utility items to your app.

[Add Utility Item](#)

Utility Bar Alignment ⓘ

Default ▼

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.



To enable the utility bar for this app, add a utility item.

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

Navigation Rules

User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

[Create](#) ▼

Search: Type to filter list...

- Accounts
- Activation Targets
- Activations
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests

Selected Items

- Jewel Customers
- Items
- Customer Orders
- Prices
- Billings
- Reports
- Dashboards

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

Navigation Rules

User Profiles

Navigation Rules

Navigation rules determine whether to open a related record in addition to the primary record.

Items

Customer Orders

Billings

Items open as

- ☒ Workspace tabs
- ☐ Subtabs of

Customer Name (Jewel_Customer__c)

App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)
- Navigation Items
- Navigation Rules
- User Profiles**

User Profiles

Choose the user profiles that can access this app.

Available Profiles

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Anypoint Integration
- Authenticated Website
- Authenticated Website
- B2B Reordering Portal Buyer Profile
- Contract Manager
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile



Selected Profiles

- System Administrator
- Gold Smith
- A worker
- K worker

Fields:

To Create a relationship between Jewel Customer & Customer Order:

-

Setup

Home

Object Manager

Search Setup

Star

Plus

Cloud

Help

Settings

Notifications

Profile

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

Details

Description

API Name

Customer_Order__c

Custom

✓

Singular Label

Customer Order

Plural Label

Customer Orders

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

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SETUP > OBJECT MANAGER

Customer Order

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Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

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)		
Customer Order, Name	Name	Auto Number		✓
Item	Item__c	Master-Detail(Item)		✓
Jewel Customer	Jewel_Customer__c	Lookup(Jewel Customer)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Order Status	Order_Status__c	Picklist		

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

Object Access

Triggers

Fields & Relationships

11 Items. Sorted by Field Label

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Country	Country__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Jewel Customer Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
State	State__c	Text(20)		
Street	Street__c	Text(20)		
Zip/Postal code	Zip_Postal_code__c	Text(6)		

Schema Builder:

Creating the Field Dependencies:

Setup

Home

Object Manager

Q, Quick Find

Setup Home

Salesforce Go

Service Setup Assistant

Commerce Setup Assistant

Field Service Setup Home (Beta)

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

Users

Data

Email

PLATFORM TOOLS

Subscription Management

Apps

App Manager

SETUP

Save

Cancel

Preview

Controlling Field

Priority

Dependent Field

Expected Days Of Return

Instructions

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

Legend

Excluded Value

Included Value

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

Include Values

Exclude Values

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

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

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

Include Values

Exclude Values

Save

Cancel

Preview

Item | Salesforce x - Student x +

orgfarm-fe88f7e9c5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001jLR7/FieldsAndRelationships/viewDependencyList

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Item

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Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Item Field Dependencies

[Back to Custom Object: Item](#)

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

Field Dependencies [New](#)

Action	Controlling Field	Dependent Field	Modified By
Edit Del	Priority	Expected Days Of Return	Kavya shree, 9/18/2025, 6:19 AM

Creating the Validation Rule:

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Jewel Customer

Details

Fields & Relationships

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Search Layouts

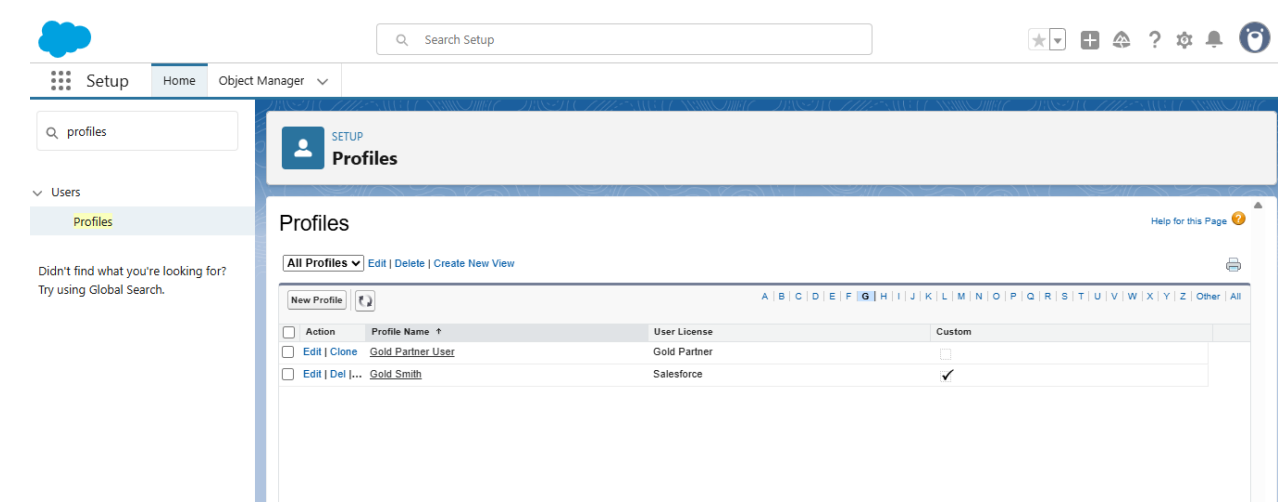
Validation Rules

2 Items, Sorted by Rule Name [New](#)

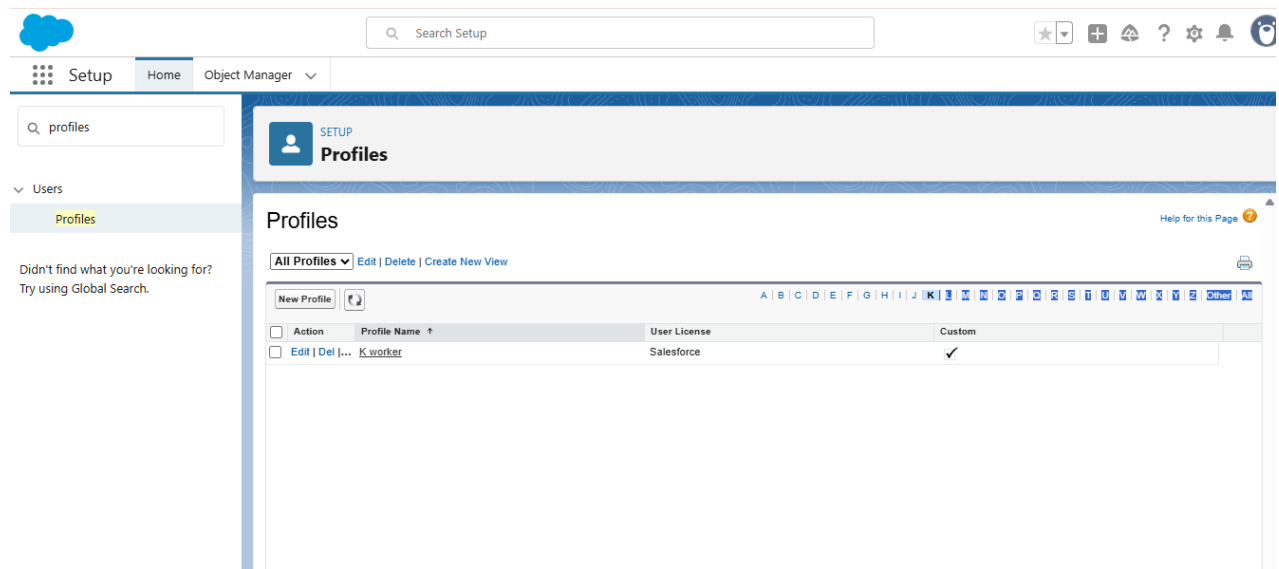
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Postal_Code	Zip/Postal code	Must contain 6 digits	✓	Kavya shree, 9/4/2025, 10:31 AM
ValidationRule_For_JewelCustomerObject	Top of Page	Please fill Required fields	✓	Kavya shree, 9/4/2025, 10:33 AM

Profiles:

Gold Smith Profile:



Worker profile



Roles:

Creating roles to Goldsmith and worker

Setup

Home

Object Manager

roles

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

Didn't find what you're looking for?

Try using Global Search.

SEARCH

Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

Profile

SETUP

Roles

Creating the Role Hierarchy

Help for this Page

You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.

Your Organization's Role Hierarchy

Collapse All Expand All

St Joseph's College for women

CEO

CFO

COO

Gold Smith

Worker

SVP, Customer Service & Support

Customer Support, International

Customer Support, North America

Installation & Repair Services

USERS:

Setup

Home

Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for?

Try using Global Search.

SEARCH

Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

Profile

SETUP

Users

User

Help for this Page

Niklaus Mikaelson

Permission Set Assignments | Permission Set Assignments Activation Required | Permission Set Group Assignments | Permission Set License Assignments | Personal Groups | Public Group Membership | Queue Membership | Team | Managers in the Role Hierarchy | OAuth Apps | Third-Party Account Links | Built-in Authenticators | Installed Mobile Apps | Authentication Settings for External Systems | Login History | User Provisioning Accounts

User Detail

Edit | Sharing | Reset Password | Freeze | View Summary

Name	Niklaus Mikaelson	Role	Gold Smith
Alias	nmika	User License	Salesforce
Email	javanandiyankaviya@gmail.com	Profile	Gold Smith
Username	kavyatestuser25@kavuya.com	Active	✓
Nickname	User17570901904723605101	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	-	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	kgm nagar Tripur 841608 Tamil Nadu India	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	1

Setup

Home

Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for?

Try using Global Search.

SETUP

Users

User

Kol Mikaelson

Permission Set Assignments

Permission Set Assignments Activation Required

Permission Set Group Assignments

Permission Set License Assignments

Personal Groups

Public Group Membership

Queue Membership

Team

Managers in the Role Hierarchy

OAuth Apps

Third-Party Account Links

Built-In Authenticators

Installed Mobile Apps

Authentication Settings for External Systems

Login History

User Provisioning Accounts

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	Kol Mikaelson	Role	Worker
Alias	k mik	User License	Salesforce Platform
Email	shree25032005@gmail.com	Profile	myskin
Username	shree25032005@shree.com	Active	<input checked="" type="checkbox"/>
Nickname	User17570904033404028412	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>

Page Layout :

Setup

Home

Object Manager

Item

Page Layouts

Details

Fields & Relationships

Page Layouts

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Buttons, Links, and Actions

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List View Button Layout

Restriction Rules

SETUP > OBJECT MANAGER

Item

Page Layouts

3 Items, Sorted by Page Layout Name

Q, Quick Find

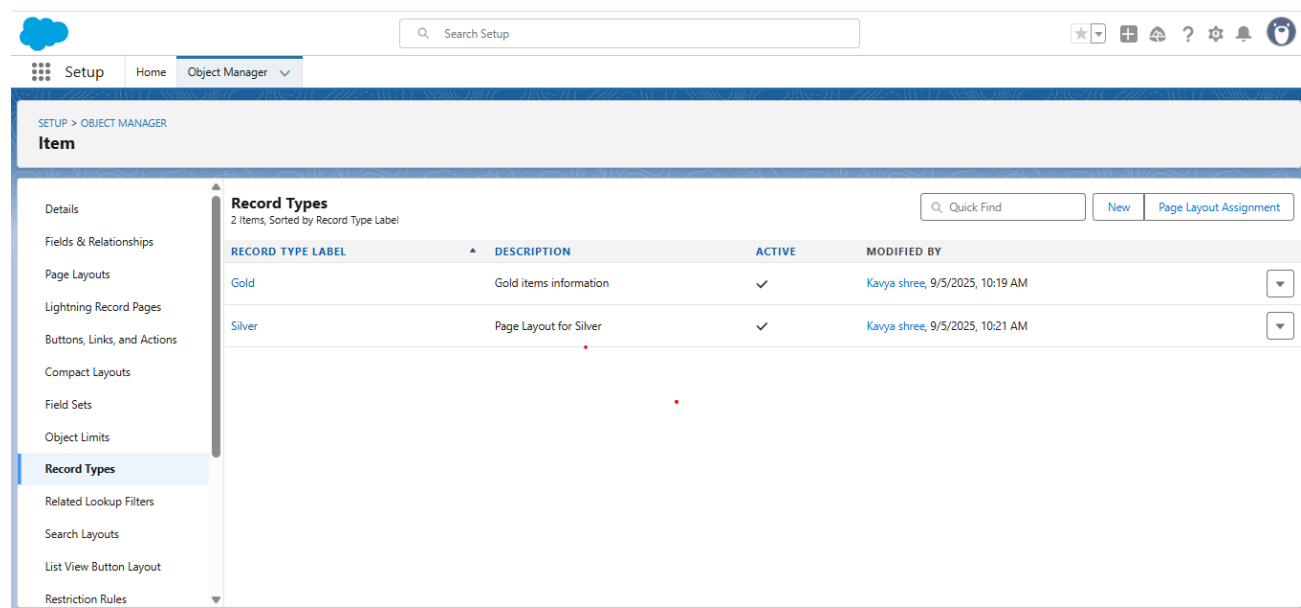
New

Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Item Layout	Kavya shree, 8/25/2025, 7:39 AM	Kavya shree, 8/31/2025, 7:10 AM	
Page Layout for Gold	Kavya shree, 9/5/2025, 9:48 AM	Kavya shree, 9/5/2025, 9:57 AM	
Page Layout for Silver	Kavya shree, 9/5/2025, 9:59 AM	Kavya shree, 9/5/2025, 10:05 AM	

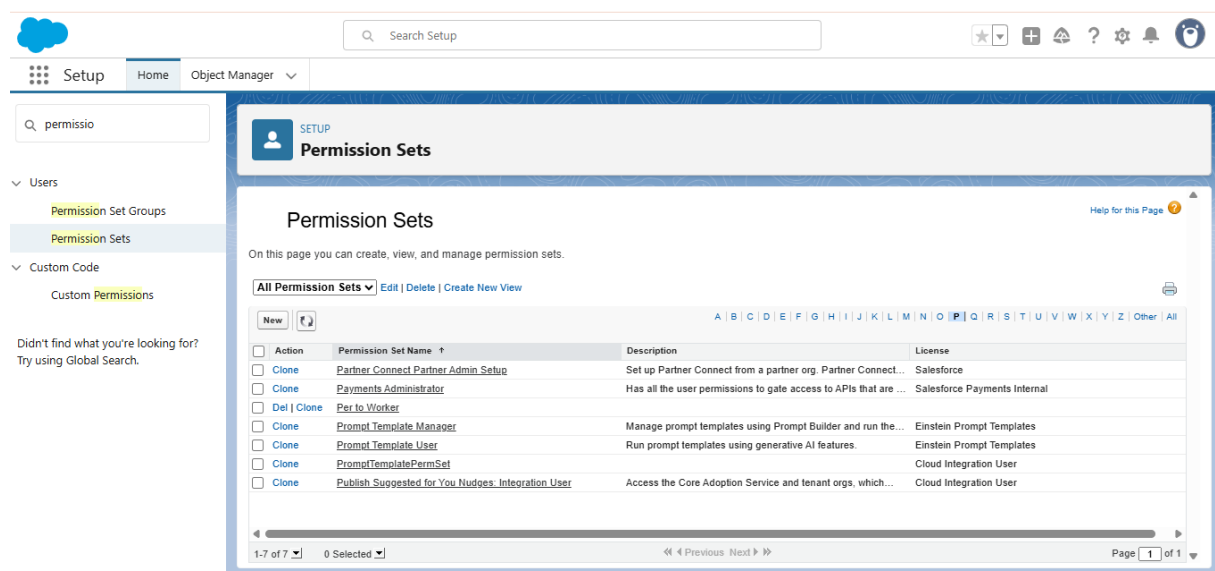
Record Types

To create a Record Type:



Permission sets

Creating permission set:



... > SETUP > PERMISSION SET 'PER TO WORKER'

Per to Worker

Current Assignments

✎

🗑

Add Assignment

<input type="checkbox"/>	Full Name ↑	Active	Role	Profile	User License	Expires On
<input type="checkbox"/>	Niklaus Mikaelson	✓	Gold Smith	Gold Smith	Salesforce	

Trigger:

Create a Trigger Handler class:

Dashboard 1 | Salesforce

Permission Sets | Salesforce

Developer Console

- Student

Inbox (827) - jayapandiyank

orgfarm-fe88f7e9c5-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File

Edit

Debug

Test

Workspace

Help

UpdatePaidAmountTriggerHandler.apxc

UpdatePaidAmountTriggerHandler.apxt

Code Coverage: None

API Version: 64

Go

1

2

3

4

5

6

7

8

9

10

11

12

13

14

```

public class UpdatePaidAmountTriggerHandler {
    public static void handleBeforeInsert(List<Billing__c> newBillings) {
        for (Billing__c billing : newBillings) {
            billing.Paid_Amount__c = billing.Paying_Amount__c;
        }
    }
}

```

Logs

Tests

Checkpoints

Query Editor

View State

Progress

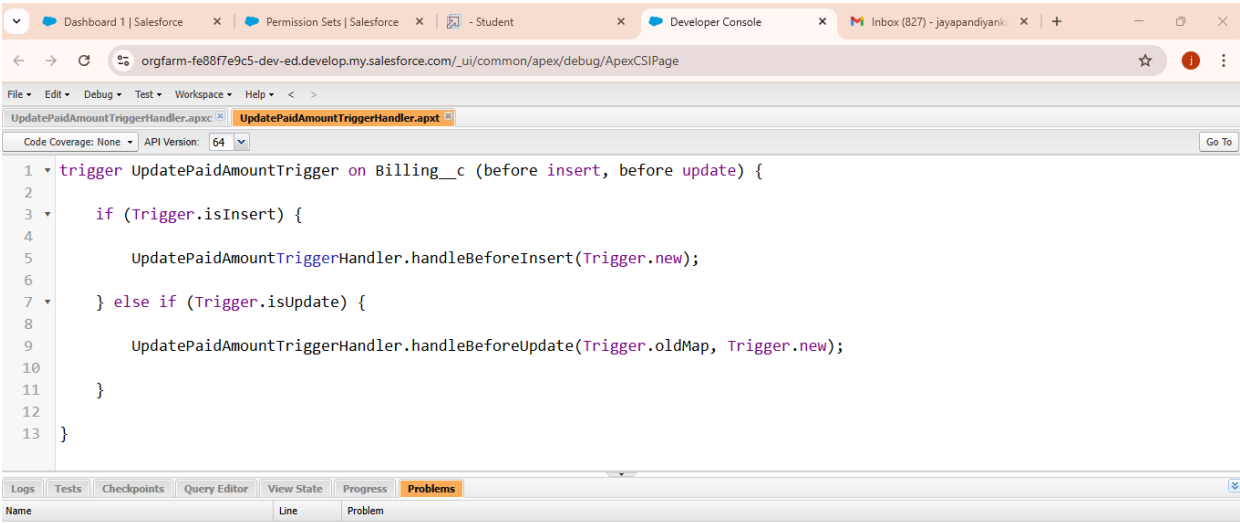
Problems

Name

Line

Problem

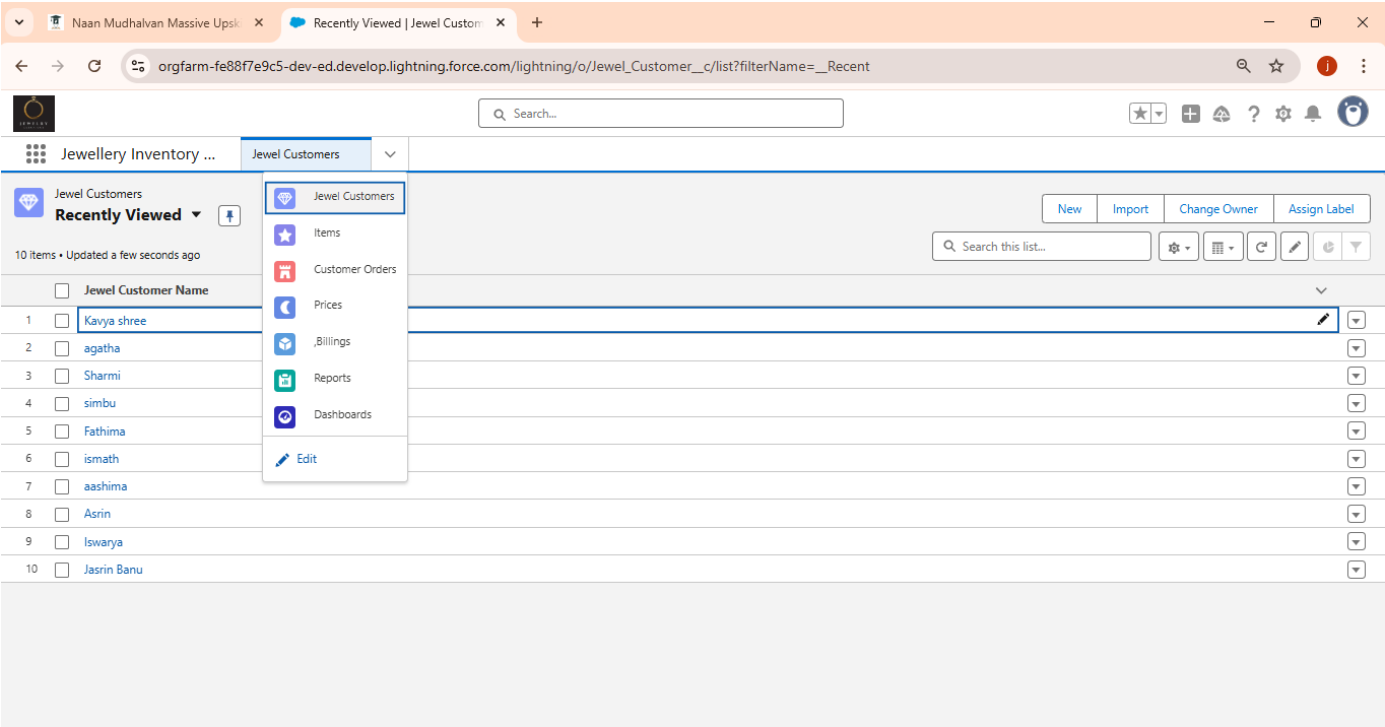
Creating the trigger:



```
1 trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {
2
3     if (Trigger.isInsert) {
4
5         UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);
6
7     } else if (Trigger.isUpdate) {
8
9         UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap, Trigger.new);
10
11     }
12
13 }
```

User Adoption:

Creating and Viewing a Record Jewel Customer



Naan Mudhalvan Massive Upsk... Recently Viewed | Jewel Custom... +

orgfarm-fe88f7e9c5-dev-ed.develop.lightning.force.com/lightning/o/Jewel_Customer__c/list?filterName=__Recent

Jewellery Inventory ... Jewel Customers

Jewel Customers Recently Viewed 10 Items • Updated a few seconds ago

☐ Jewel Customer Name

1	<input type="checkbox"/>	Kavya shree	
2	<input type="checkbox"/>	agatha	
3	<input type="checkbox"/>	Sharmi	
4	<input type="checkbox"/>	simbu	
5	<input type="checkbox"/>	Fathima	
6	<input type="checkbox"/>	ismath	
7	<input type="checkbox"/>	aashima	
8	<input type="checkbox"/>	Asrin	
9	<input type="checkbox"/>	Iswarya	
10	<input type="checkbox"/>	Jasrin Banu	

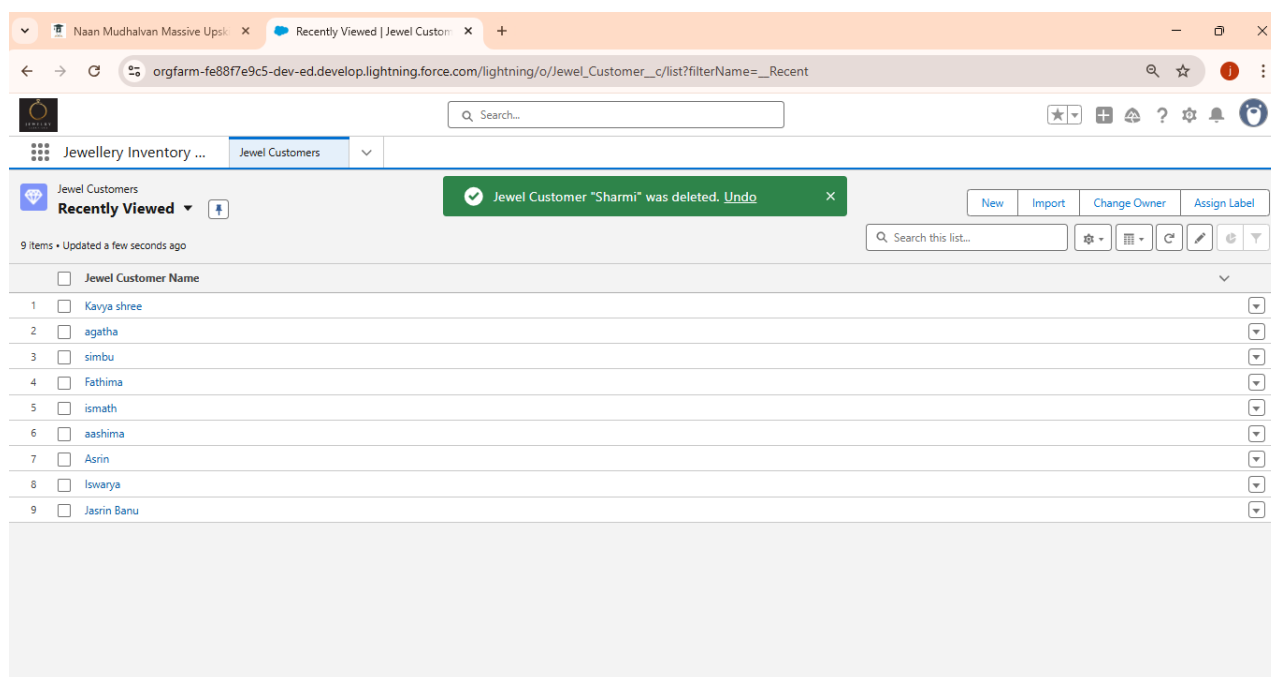
New Import Change Owner Assign Label

Search this list...

Jewel Customers

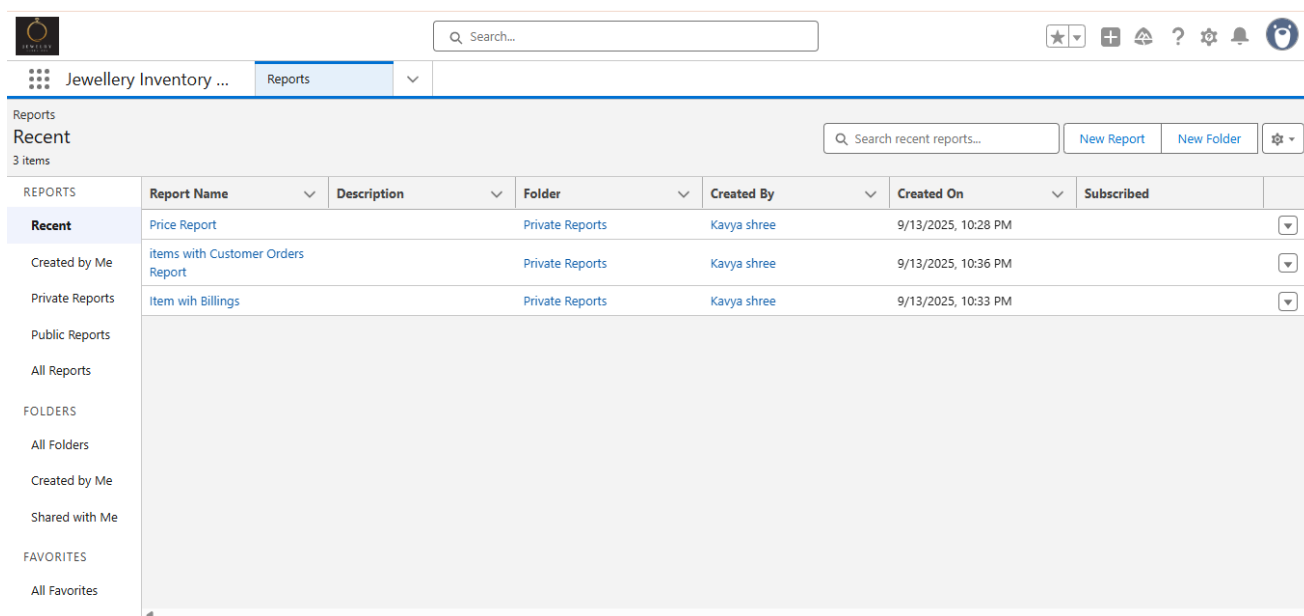
- Items
- Customer Orders
- Prices
- Billings
- Reports
- Dashboards
- Edit

Deleting a Record



Reports

Creating A Reports





Jewellery Inventory ...

Reports



Price Report



Report: Prices

Price Report

[Enable Field Editing](#)[Add Chart](#)[Edit](#)Total Records
10Total Gold Price
\$419,879

	Price: ID	Price: Price Name	Gold Price
1	a03gL00000Buick	Item-04	\$110,510
2	a03gL00000BuoS5	Item-08	-
3	a03gL00000Bur8A	Item-03	\$10,130
4	a03gL00000Butmg	Item-09	-
5	a03gL00000BuuZ5	Item-06	-
6	a03gL00000BuukL	Item-01	\$150,000
7	a03gL00000BuwHJ	Item-02	\$11,051
8	a03gL00000Bux2H	Item-05	\$8,288
9	a03gL00000Bux8j	Item-07	-
10	a03gL00000BuxDZ	Item-10	\$129,900
11			\$419,879



Jewellery Inventory ...

Reports



Items with Customer...



Report: Items with Customer Orders

Items with Customer Orders Report

[Field Editing Enabled](#)[Add Chart](#)[Edit](#)Total Records
10Total Amount
\$1,891,405.188

	Ornament	Expected Days Of Return	Customer Name	Amount	Item: ID	Item: Item Name	Customer Order: Customer Order, Name
1	Anklet	4-5 Days	-	\$0.000	a01gL00000NQmyD	Item-06	Item-01
2	rings	4-5 Days	aashima	\$577,513.750	a01gL00000NQbTR	Item-10	Item-02
3	bangles	6-7 Days	Asrin	\$0.000	a01gL00000NQVCg	Item-09	Item-03
4	earnings	4-5 Days	aashima	\$0.000	a01gL00000NQbOW	Item-07	Item-04
5	Anklet	4-5 Days	-	\$0.000	a01gL00000NQmyD	Item-06	Item-05
6	Anklet	4-5 Days	-	\$0.000	a01gL00000NQmyD	Item-06	Item-06
7	bracelet	8-10 Days	-	\$52,836.000	a01gL00000NQb20	Item-05	Item-07
8	Necklace	4-5 Days	ismath	\$93,703.271	a01gL00000NQYNP	Item-01	Item-08
9	chain	4-5 Days	agatha	\$1,175,625.000	a01gL00000NQhTt	Item-02	Item-09
10	rings	6-7 Days	Fathima	-\$8,272.833	a01gL00000NQ7gd	Item-03	Item-10
11				\$1,891,405.188			

★

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👤

Jewellery Inventory ...

Reports

Item with Billings

Report: Billings with Item

Item with Billings

Enable Field Editing

🔍

📊 Add Chart

📄

🔄

Edit

⌵

Total Records

Total Paying Amount

Total Paid Amount

Total Amount

10

\$162,343

\$20,016,546

\$3,212,215.40

	Paying Amount	Paid Amount	Amount	Billing: ID	Billing: Billing Name	Item: Item Name
1	\$45,000	\$90,000	\$796,132.46	a04gL000009hLVR	Item-06	Item-04
2	\$9,876	\$9,886,419	\$0.00	a04gL000009hML3	Item-08	Item-08
3	\$500	\$1,500	-\$8,272.83	a04gL000009hJGP	Item-05	Item-03
4	\$500	\$9,877,043	\$0.00	a04gL000009hMMF	Item-09	Item-09
5	\$1,500	\$2,000	\$1,175,625.00	a04gL000009hLLI	Item-04	Item-02
6	\$20,000	\$40,000	\$93,703.27	a04gL000009hLFJ	Item-03	Item-01
7	\$150	\$150	\$0.00	a04gL000009hJGP	Item-01	Item-07
8	\$250	\$250	\$0.00	a04gL000009hLbt	Item-07	Item-07
9	\$50,000	\$50,050	\$577,513.75	a04gL000009hJWA	Item-02	Item-10
10	\$34,567	\$69,134	\$577,513.75	a04gL000009hMOH	Item-10	Item-10
11	\$162,343	\$20,016,546	\$3,212,215.40			

Dashboard

Creating A Dashboard:

★

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🔄

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⚙️

🔔

👤

Jewellery Inventory ...

Items

Report Builder

Report Builder

Dashboard 1

Item-08 | Item

Dashboard 1

+ Widget

+ Filter

🔄

📄

⚙️

Save

Done

Price Report

Price: ID	Price: Price Name	Gold Price
a03gL00000Buek	Item-04	\$111k
a03gL00000BuoS5	Item-08	
a03gL00000Bua8A	Item-03	\$10k
a03gL00000Bumg	Item-09	
a03gL00000Buu25	Item-06	
a03gL00000Buu4L	Item-01	\$150k
a03gL00000BuwHJ	Item-02	\$11k

View Report (Price Report)

Item with Billings

Paying Amount	Paid Amount	Amount	Billing: ID	Billing: Billing Name
\$150	\$150	\$0.00	a04gL000009hJGP	Item-01
\$250	\$250	\$0.00	a04gL000009hLbt	Item-07
\$500	\$2k	-\$8,27k	a04gL000009hJGP	Item-05
\$500	\$10k	\$0.00	a04gL000009hMMF	Item-09
\$2k	\$2k	\$1,18k	a04gL000009hLLI	Item-04
\$10k	\$10k	\$0.00	a04gL000009hML3	Item-08
\$20k	\$40k	\$93,70k	a04gL000009hLFJ	Item-03

View Report (Item with Billings)

Items with Customer Orders Report

Ornament	Expected Days Of Return	Customer Name	Amount	Item: ID
Anklet	4-5 Days	Iswarya	\$0.000	a01gL00000NC2Y7N
Anklet	4-5 Days	-	\$0.000	a01gL00000NCmyD
bangles	-	agatha	\$796,132k	a01gL00000NCa8O
bangles	6-7 Days	Asm	\$0.000	a01gL00000NC2VGg
bracelet	8-10 Days	-	\$52,830k	a01gL00000NCb20
chain	4-5 Days	agatha	\$1,176k	a01gL00000NCbTt
earrings	4-5 Days	aashima	\$0.000	a01gL00000NCbOW

View Report (Items with Customer Orders Report)

Flows:

Creating A Flow:

← → ↻

orgfarm-fe88f7e9c5-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301gL00000NsU3vQAF

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Flow Builder

Billing Alert Flow - V1

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Free-Form

Last saved on 9/14/2025, 11:37 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

Get Records

Get more on the AppExchange

▶

Start

Record-Triggered Flow

Object: **Billing** Edit

Trigger: **A record is created or updated**

Optimize for: **Actions and Related Records**

+ Add Scheduled Paths (Optional)

🔗 Open Flow Trigger Explorer for Billing

Run Immediately

⚡

Action notice