

CRM APPLICATION FOR JEWEL MANAGEMENT - (Developer)

College Name: Sri Vasavi College (SFW)

College Code: BRU17

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Project Description:

The Jewel Inventory System is a comprehensive software Solution designed to streamline and manage the inventory and sales processes of a jewellery store or a jewellery manufacturer. The system aims to provide an efficient and user-friendly solution to track and control the inventory of various jewellery items, maintain accurate records, and facilitate seamless sales transactions.

As a team We've learned,

- Real Time Salesforce Project
- Data Modelling
- Creating an Application
- User Interface Customization
- Object & Relationship in Salesforce
- Formula fields and Validation rules.
- Field Dependencies
- Record Types
- Cross object formula fields.
- Conditional formatting.
- Flows
- Email alerts and email templates
- Reports & Dashboards

Purpose

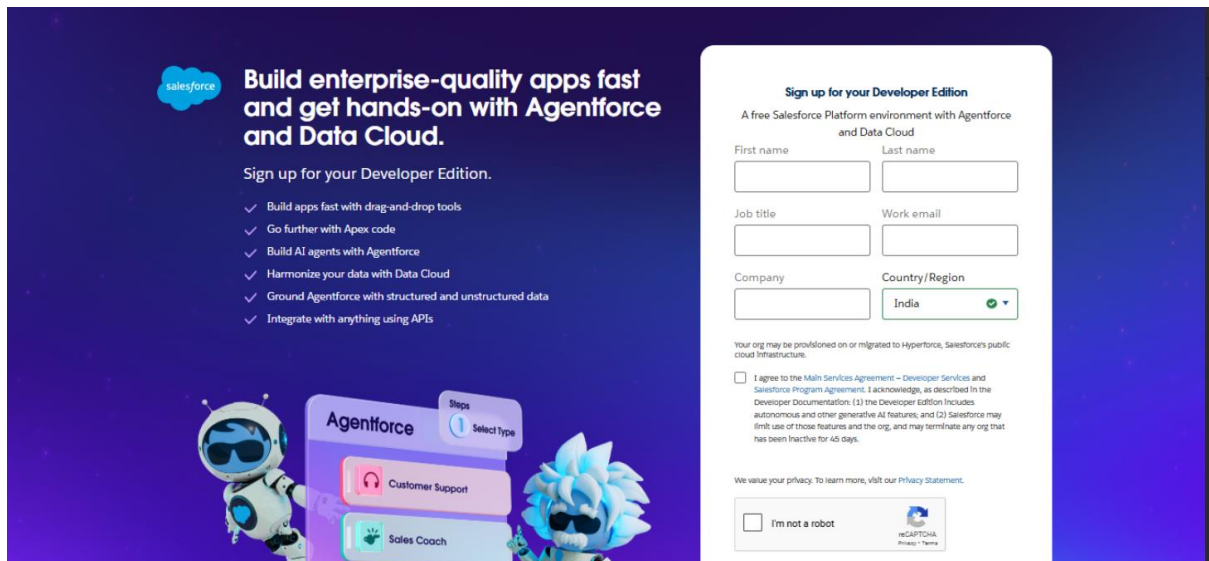
A CRM application's purpose for jewel management is to organize customer data, streamline sales and marketing efforts, personalize customer experiences, and improve overall customer retention and loyalty. It helps to track purchase history and preferences, manage special occasions like birthdays and anniversaries, automate marketing tasks, nurture leads, and gain insights into sales performance to boost revenue and foster stronger customer relationships.

DEVELOPMENT PHASE

▪ Salesforce

Creating Developer Account:

By using this URL - <https://www.salesforce.com/form/developer-signup/?d=pb>



The image shows the Salesforce Developer Edition signup form. On the left, there's a promotional banner for Agentforce and Data Cloud with a list of benefits. The main form area is titled 'Sign up for your Developer Edition' and includes fields for First name, Last name, Job title, Work email, Company, and Country/Region (set to India). There's a checkbox for agreeing to the Main Services Agreement and a reCAPTCHA 'I'm not a robot' checkbox.

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 Last name

Job title Work email

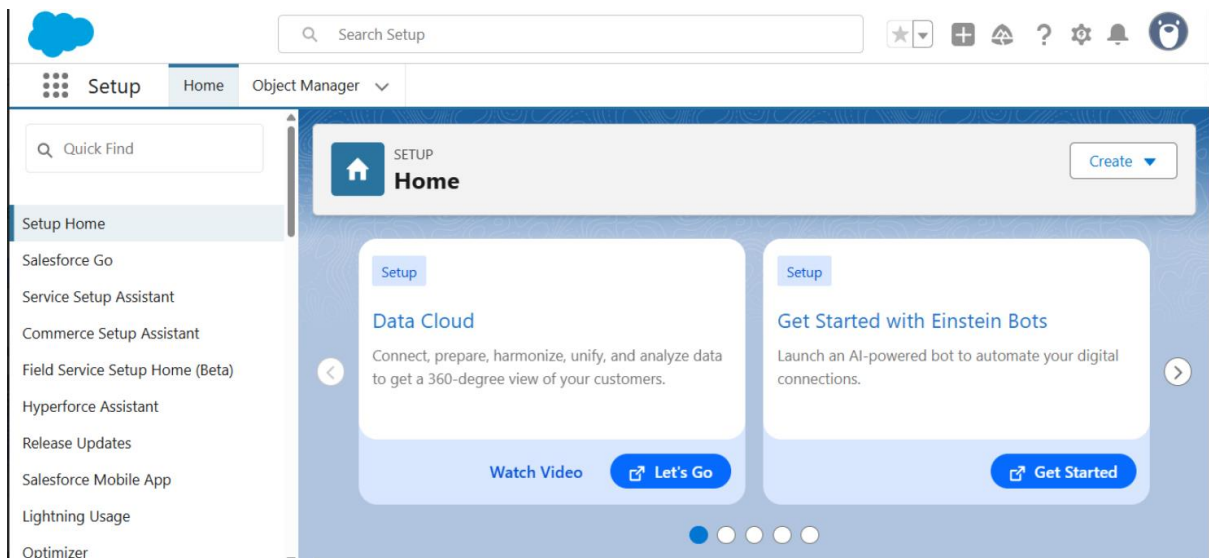
Company Country/Region

☐ I agree to the Main Services 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 

Account Activation



▪ Object

Create Jewel Customer Object

The screenshot shows the Salesforce Setup interface for the 'Jewel Customer' object. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The main header displays 'SETUP > OBJECT MANAGER' and 'Jewel Customer'. A left sidebar lists 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, List View Button Layout, Restriction Rules, Scoping Rules, and Object Access. The 'Details' section is active, showing fields for Description, API Name (Jewel_Customer_c), Custom (checked), Singular Label (Jewel Customer), Plural Label (Jewel Customers), Enable Reports (checked), Track Activities (checked), Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Edit and Delete buttons are in the top right.

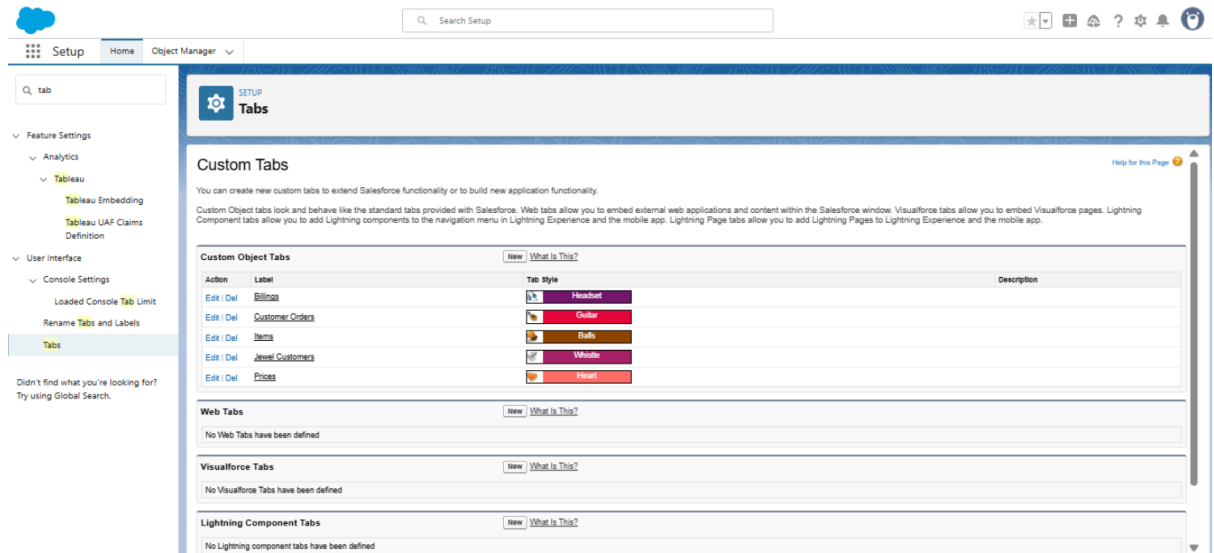
Field	Value
Description	
API Name	Jewel_Customer_c
Custom	✓
Singular Label	Jewel Customer
Plural Label	Jewel Customers
Enable Reports	✓
Track Activities	✓
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Create Item Object

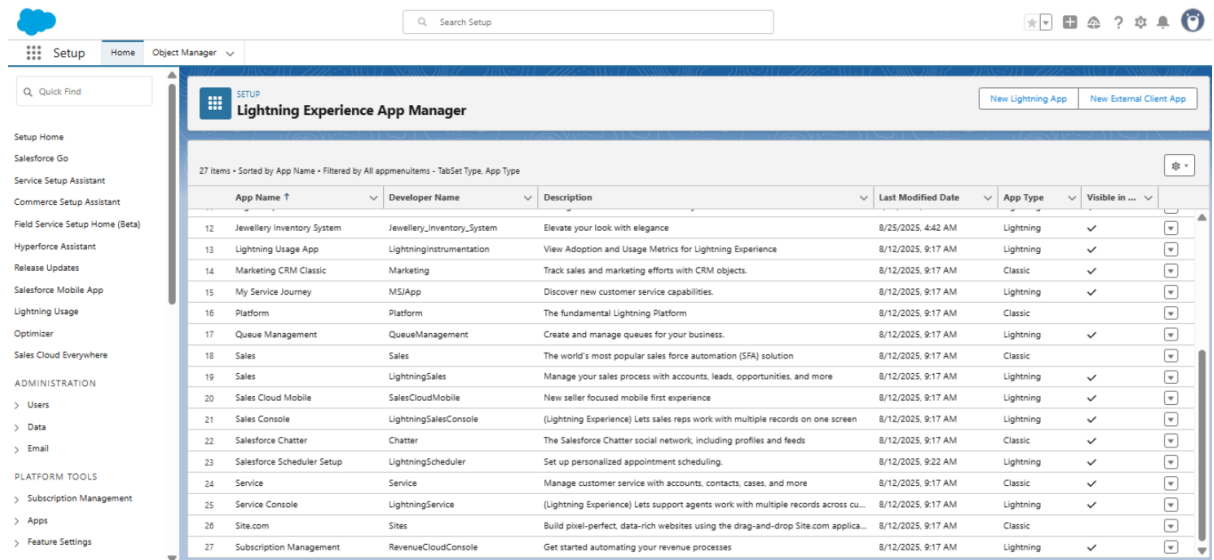
The screenshot shows the Salesforce Setup interface for the 'Item' object. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The main header displays 'SETUP > OBJECT MANAGER' and 'Item'. A left sidebar lists configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, and Object Access. The 'Details' section is active, showing fields for Description, API Name (Item_c), Custom (checked), Singular Label (Item), Plural Label (Items), Enable Reports (checked), Track Activities (checked), Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Edit and Delete buttons are in the top right.

Field	Value
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

- **Tabs**
Creating a Custom Tab For (Jewel Customer. Item, Customer Order, Price ,Billing Objects)



- **The Lightning App**
Create a Lightning App



Fields

Setup

Home

Object Manager

Search Setup

Star

Grid

Refresh

Help

Settings

Notifications

User

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

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		
State	State__c	Text(20)		
Street	Street__c	Text(20)		
Zip/Postal code	Zip_Postal_code__c	Text(8)		

Setup

Home

Object Manager

Search Setup

Star

Grid

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

Restriction Rules

Scoping Rules

Object Access

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

Setup

Home

Object Manager

Search Setup

Star

Grid

Refresh

Help

Settings

Notifications

User

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

Object Access

Fields & Relationships

23 Items. Sorted by Field Label

Quick Find


New

Deleted Fields







Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Customer	Customer__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)		
Last Modified By	LastModifiedById	Lookup(User)		
Making Charges	Making_Charges__c	Formula (Currency)		
Ornament	Ornament__c	Text(20)		



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Price

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction RulesScoping RulesObject Access


Fields & Relationships

6 Items, Sorted by Field Label







Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Gold Price	Gold_Price__c	Currency(8, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		
Price	Name	Auto Number		
Silver Price	Silver_Price__c	Currency(8, 5)		



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Billing

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction RulesScoping RulesObject Access

Fields & Relationships

16 Items, Sorted by Field Label

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Billing	Name	Auto Number		
Created By	CreatedById	Lookup(User)		
Gold/Silver Price	Stone_Other_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)		
Ornament	Ornament__c	Formula (Text)		
Owner	OwnerId	Lookup(User Group)		
Paid Amount	Paid_Amount__c	Currency(18, 0)		

▪ Profiles

Gold Smith Profile

The screenshot shows the Salesforce Setup interface for the 'Gold Smith' profile. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the profile details and page layouts.

Profile: Gold Smith

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.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Principal Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Settings Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail

Name	Gold Smith	Custom Profile	✓
User License	Salesforce		
Description			
Created By	Princy Navera B. 8/27/2025, 8:12 AM	Modified By	Princy Navera B. 8/27/2025, 7:48 AM

Page Layouts

Standard Object Layouts	Global	Location Group
Global	Global Layout (View Assignment)	Location Group Layout (View Assignment)
Email Application	Not Assigned (View Assignment)	Location Group Assignment Layout (View Assignment)
Home Page Layout	Home Page Default (View Assignment)	Macro Layout (View Assignment)
Account	Account Layout (View Assignment)	Object Milestone Layout (View Assignment)
Alternative Payment Method	Alternative Payment Method Layout (View Assignment)	Operating Hours Layout (View Assignment)
Appointment Invitation	Appointment Invitation Layout (View Assignment)	Opportunity Layout (View Assignment)
Asset	Asset Layout (View Assignment)	Opportunity Product Layout (View Assignment)
Asset Action	Asset Action Layout	Order Layout

Worker Profile

The screenshot shows the Salesforce Setup interface for the 'Worker' profile. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the profile details and page layouts.

Profile: Worker

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.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Principal Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Settings Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail

Name	Worker	Custom Profile	✓
User License	Salesforce		
Description			
Created By	Princy Navera B. 8/27/2025, 8:57 AM	Modified By	Princy Navera B. 8/27/2025, 7:48 AM

Page Layouts

Standard Object Layouts	Global	Location Group
Global	Global Layout (View Assignment)	Location Group Layout (View Assignment)
Email Application	Not Assigned (View Assignment)	Location Group Assignment Layout (View Assignment)
Home Page Layout	Home Page Default (View Assignment)	Macro Layout (View Assignment)
Account	Account Layout (View Assignment)	Object Milestone Layout (View Assignment)
Alternative Payment Method	Alternative Payment Method Layout (View Assignment)	Operating Hours Layout (View Assignment)
Appointment Invitation	Appointment Invitation Layout (View Assignment)	Opportunity Layout (View Assignment)
Asset	Asset Layout (View Assignment)	Opportunity Product Layout (View Assignment)
Asset Action	Asset Action Layout	Order Layout

▪ Roles

User Edit: Niklaus Mikaelson

General Information

First Name	Niklaus	Role	Gold Smith
Last Name	Mikaelson	User License	Salesforce
Alias	nmika	Profile	Gold Smith
Email	princynavars@gmail.com	Active	<input checked="" type="checkbox"/>
Username	sreepincy@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User175717682364315789	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Sfha.com Contributor User	<input type="checkbox"/>
		Sfha.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	--None--
		Data.com Monthly Addition Limit	300
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>
		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
		Debug Mode	<input type="checkbox"/>
		Send Apex Warning Emails	<input type="checkbox"/>

▪ Page layouts

To Create a Gold And Silver Page layout

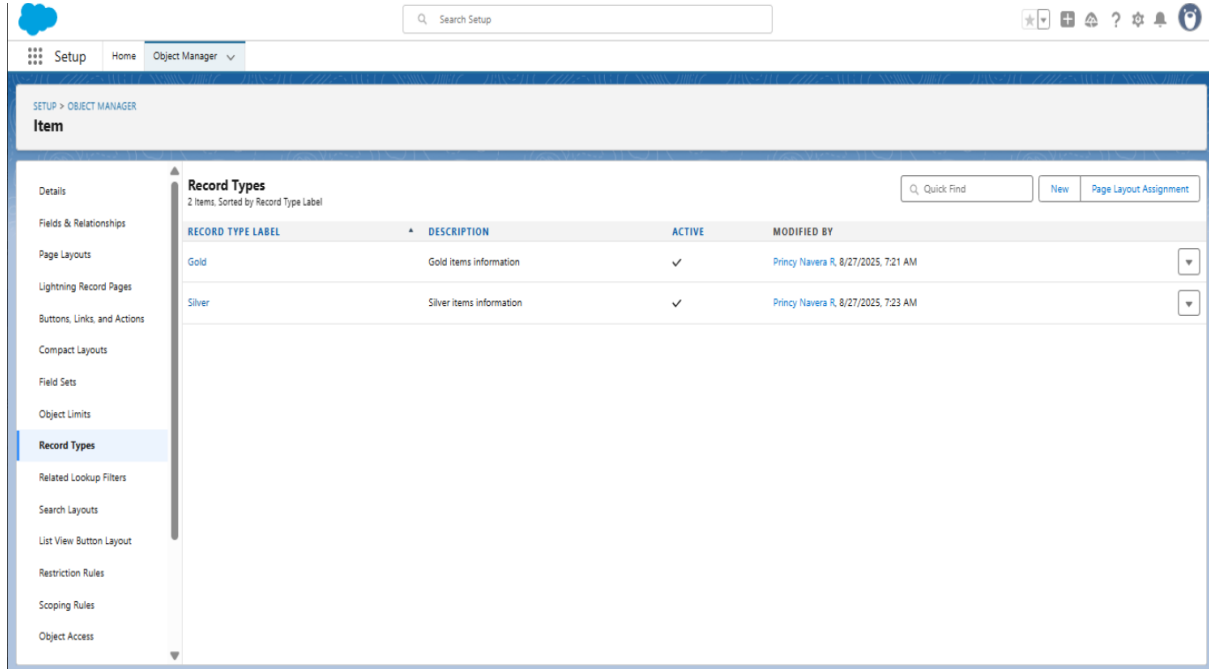
Page Layouts

3 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Item Layout	Princy Navera R, 8/25/2025, 4:18 AM	Princy Navera R, 8/27/2025, 3:58 AM
Page Layout for Gold	Princy Navera R, 8/27/2025, 7:06 AM	Princy Navera R, 8/27/2025, 7:13 AM
Page Layout for Silver	Princy Navera R, 8/27/2025, 7:15 AM	Princy Navera R, 8/27/2025, 7:17 AM

▪ Record Types

To create a Record Type

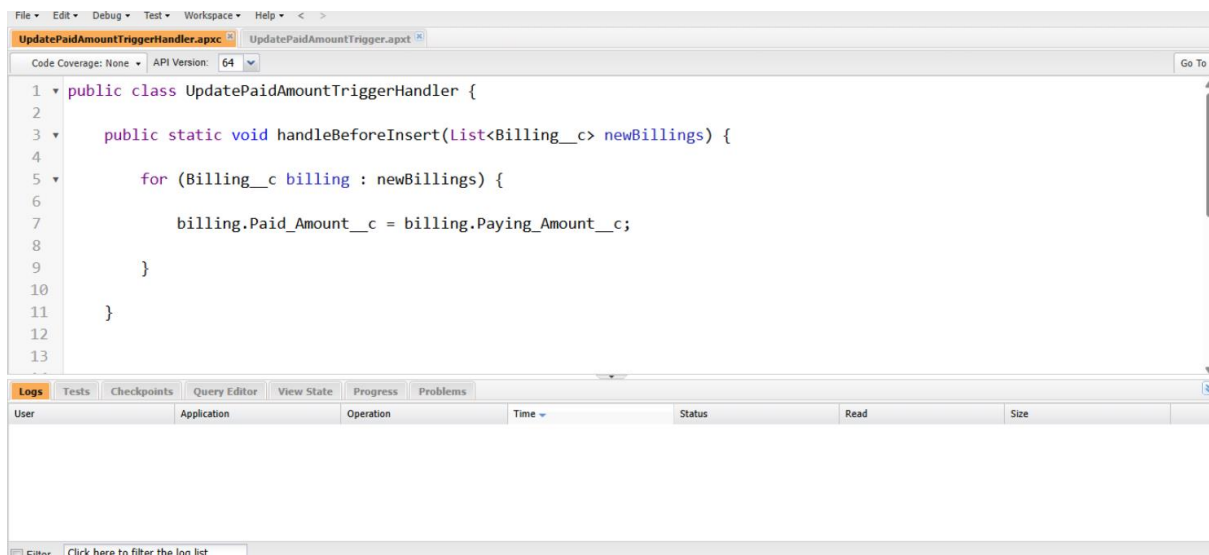


The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types (selected), Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, and Object Access. The main content area is titled 'Item' and displays 'Record Types' for the 'Item' object. It shows a table with 2 items, sorted by Record Type Label. The table has columns for Record Type Label, Description, Active status, and Modified By. The items are 'Gold' and 'Silver', both active, and modified by 'Princy Navera R' on 8/27/2025 at 7:21 AM and 7:23 AM respectively. There are 'Quick Find', 'New', and 'Page Layout Assignment' buttons at the top right of the table.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold Items information	✓	Princy Navera R, 8/27/2025, 7:21 AM
Silver	Silver Items information	✓	Princy Navera R, 8/27/2025, 7:23 AM

▪ Trigger

Create a Trigger Handler class

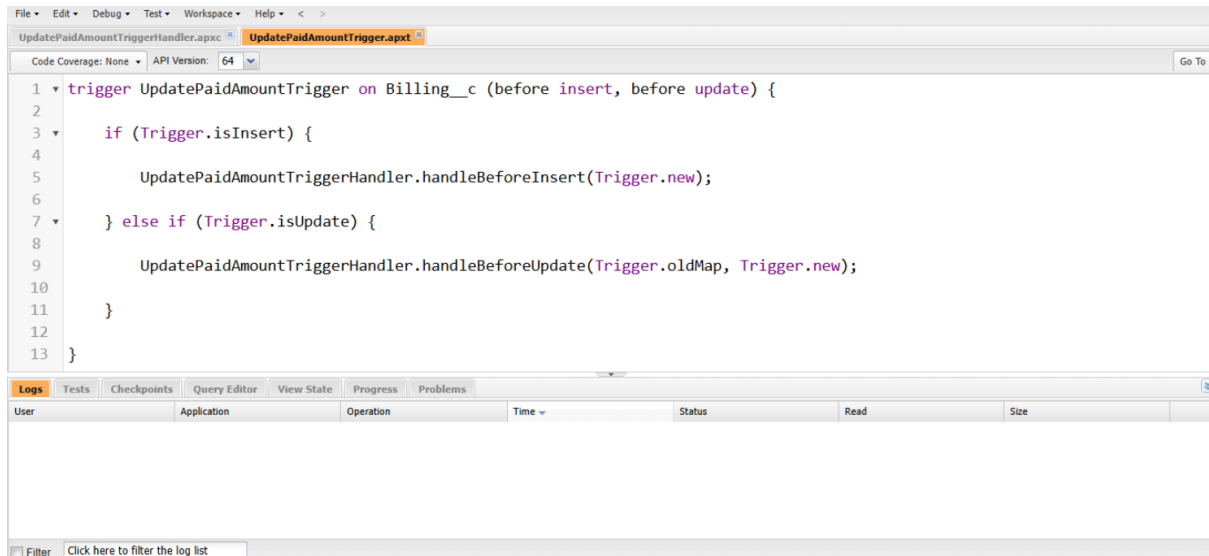


The screenshot shows the Salesforce IDE. The top menu bar includes File, Edit, Debug, Test, Workspace, and Help. The main editor displays a Java class named 'UpdatePaidAmountTriggerHandler' with the following code:

```
1 public class UpdatePaidAmountTriggerHandler {
2
3     public static void handleBeforeInsert(List<Billing__c> newBillings) {
4
5         for (Billing__c billing : newBillings) {
6
7             billing.Paid_Amount__c = billing.Paying_Amount__c;
8
9         }
10    }
11 }
12
13
```

The bottom of the IDE shows the 'Logs' tab, which displays a table with columns: User, Application, Operation, Time, Status, Read, and Size. Below the table is a 'Filter' button and a link to 'Click here to filter the log list'.

Create the trigger



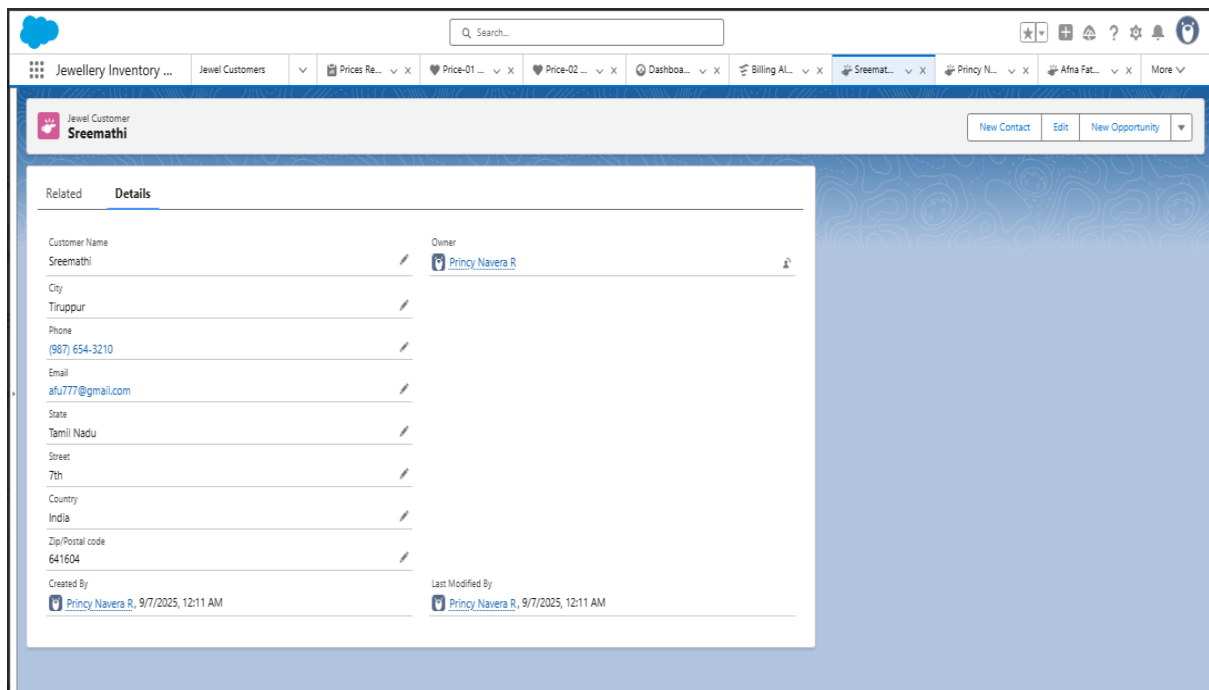
The screenshot shows the Visual Studio Code editor with the file `UpdatePaidAmountTrigger.apxt` open. The code is an Apex trigger named `UpdatePaidAmountTrigger` on the `Billing__c` object, configured to run before insert and update operations. The trigger logic is as follows:

```
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 }
```

Below the editor, the 'Logs' tab is active, displaying a table with columns: User, Application, Operation, Time, Status, Read, and Size. The table is currently empty. A filter button and a link to filter the log list are visible at the bottom of the logs panel.

▪ User Adoption

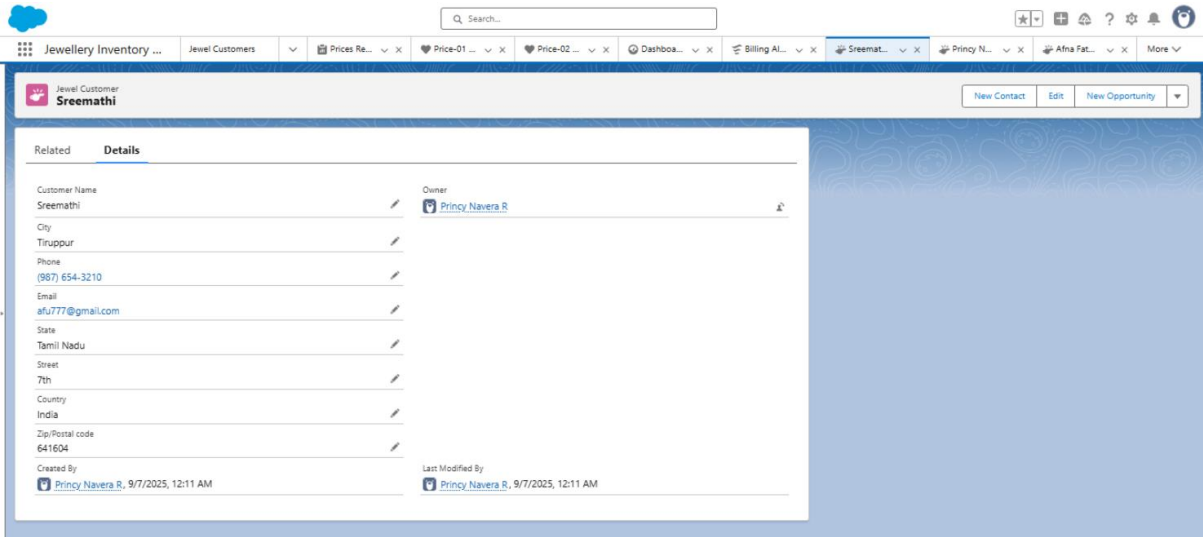
Create a Record (Jewel Customer)



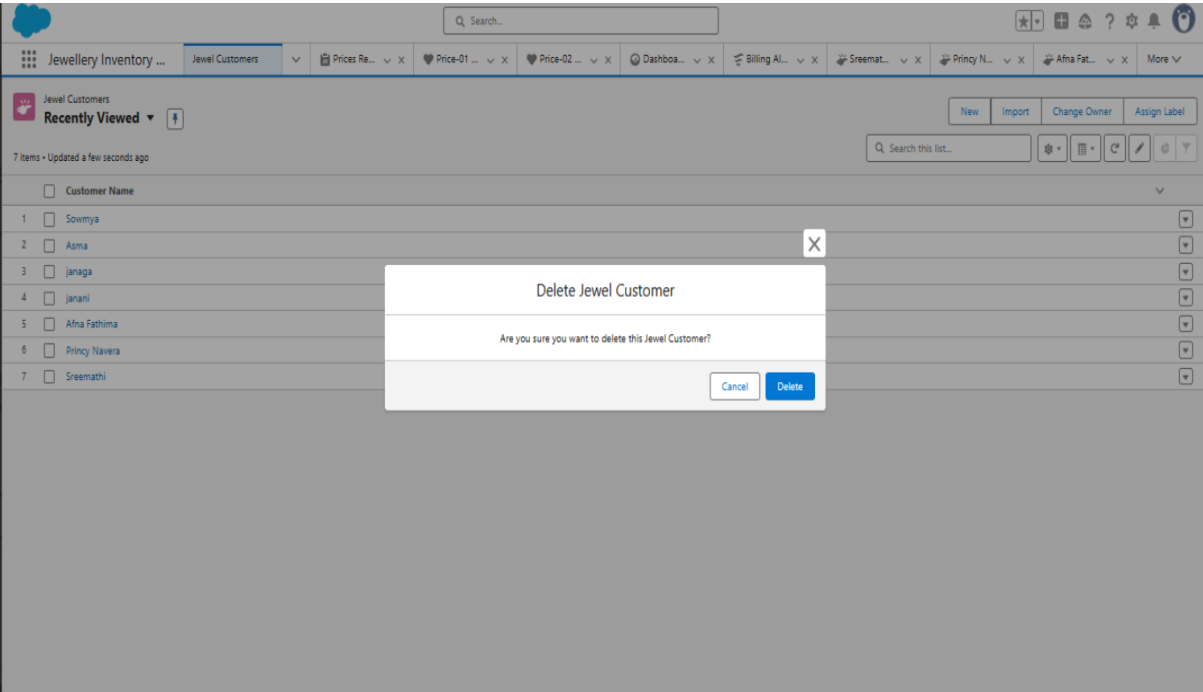
The screenshot displays the 'Jewel Customer' record page for a customer named 'Sreemathi'. The page includes a search bar at the top, a navigation menu with tabs like 'Jewellery Inventory', 'Jewel Customers', and 'Prices Re...', and a list of open tabs. The main content area shows the 'Details' tab for the customer record.

Related	Details
Customer Name	Sreemathi
City	Tiruppur
Phone	(987) 654-3210
Email	afu777@gmail.com
State	Tamil Nadu
Street	7th
Country	India
Zip/Postal code	641604
Created By	Princy Navera R, 9/7/2025, 12:11 AM
Last Modified By	Princy Navera R, 9/7/2025, 12:11 AM

View a Record (Jewel Customer)



Delete a Record (Jewel Customer)



■ **Reports**
Create Report

Jewellery Inventory ...

Reports

Prices Report

Price-01 | Price

Price-02 | Price

Dashboard1

Billing Alter Flow | FL...

Reports

Recent

1 item

Search recent reports...

New Report

New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Prices Report		Private Reports	Princy Navera R	8/28/2025, 5:02 AM	
Created by Me						
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

Reports

Jewellery Inventory ...

Reports

Prices Report

Price-01 | Price

Price-02 | Price

Dashboard1

Billing Alter Flow | FL...

Report: Prices

Prices Report

Enable Field Editing

Search

Add Chart

Edit

Total Records

2

Total Gold Price

\$18,500

Total Silver Price

\$8,000.00000

	Price: Price	Gold Price +	Silver Price
1	Price-02	\$9,500	\$3,000.00000
2	Price-01	\$9,000	\$5,000.00000
3		\$18,500	\$8,000.00000

■ Dashboards

Create Dashboard

The screenshot displays the Salesforce Dashboard interface. At the top, there's a navigation bar with a search bar and various utility icons. Below this, a breadcrumb trail shows the path: Jewellery Inventory > Dashboards > Prices Report > Price-01 | Price > Price-02 | Price > Dashboard1. The main content area features a 'Prices Report' widget. The widget has a title bar with a refresh icon and a close icon. Below the title bar is a table with the following data:

Price: Price ↑	Gold Price	Silver Price
Price-01	\$9k	\$5.00000k
Price-02	\$10k	\$3.00000k

At the bottom of the widget, there's a link 'View Report (Prices Report)' and a timestamp 'As of Sep 7, 2025, 12:44 AM'.

■ FLOW

CREATE FLOW

The screenshot displays the Salesforce Flow Builder interface. At the top, there's a navigation bar with a search bar and various utility icons. Below this, a breadcrumb trail shows the path: Flow Builder > Billing Alter Flow - V1. The main content area features a flow diagram. The flow starts with a 'Start' node (Record-Triggered Flow) with the following configuration:

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

Below the 'Start' node is a 'Run Immediately' button. The flow then proceeds to an 'Action' node (Action notice).

THIS IS THE LAST STEP OF CRM APPLICATION FOR JEWEL APPLICATION.

NOW THE JEWEL INVENTORY SYSTEM IS ACTIVATED.

CONCLUSION

THE CRM APPLICATION FOR JEWEL MANAGEMENT HAS BEEN SUCCESSFULLY DEVELOPED AND CONFIGURED BY CREATING CUSTOM OBJECTS , FIELDS , PROFILES , ROLES ,USERS,PAGELAYOUTS,RECORD TYPES,PERMISSION SETS ,TRIGGERS ,REPORTS, DASHBOARDS AND FLOWS. THIS IMPLEMENTATION ENABLES EFFICIENT TRACKING AND MANAGEMENT OF JEWELLERY INVENTORY, CUSTOMER DETAILS AND RELATED OPERATIONS. THE SYSTEM IS NOW FULLY FUNCTIONAL AND READY FOR USE, PROVIDING A STREAMLINED, USER FRIENDLY SOLUTION FOR JEWEL MANAGEMENT AND SUPPORTING IMPROVED BUSINESS PROCESSES.