CRM APPLICATION FOR JEWEL MANAGEMENT - (Developer)

College Name: Sri Vasavi College (SFW)

College Code: BRU17

TEAM ID: NM2025TMID23339

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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

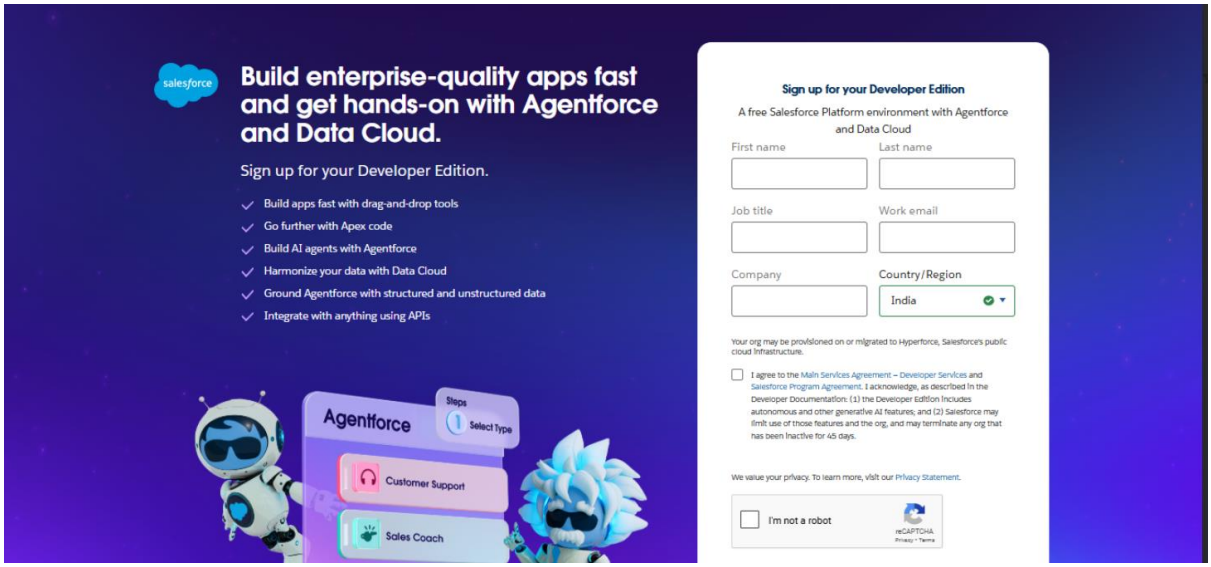
A CRM application's purpose for jewel management is to organize customer data, streamline sales and marketing efforts, personalize customer experiences, and improve overall customer retention and loyalty. It helps to track purchase history and preferences, manage special occasions like birthdays and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

DEVELOPMENT PHASE

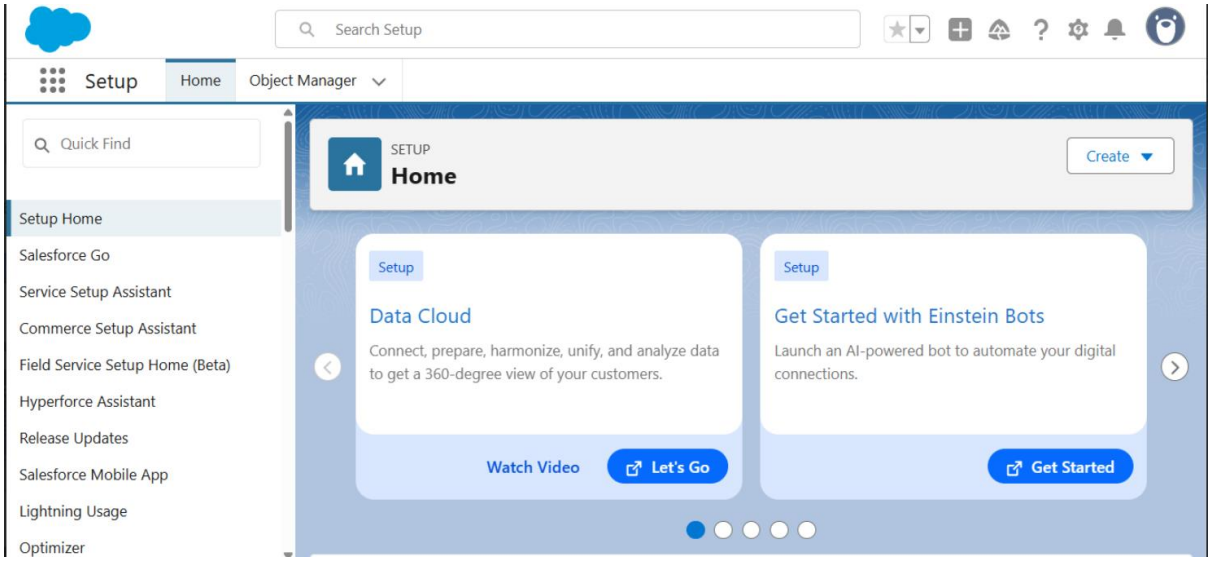
- **Salesforce**

Creating Developer Account:

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

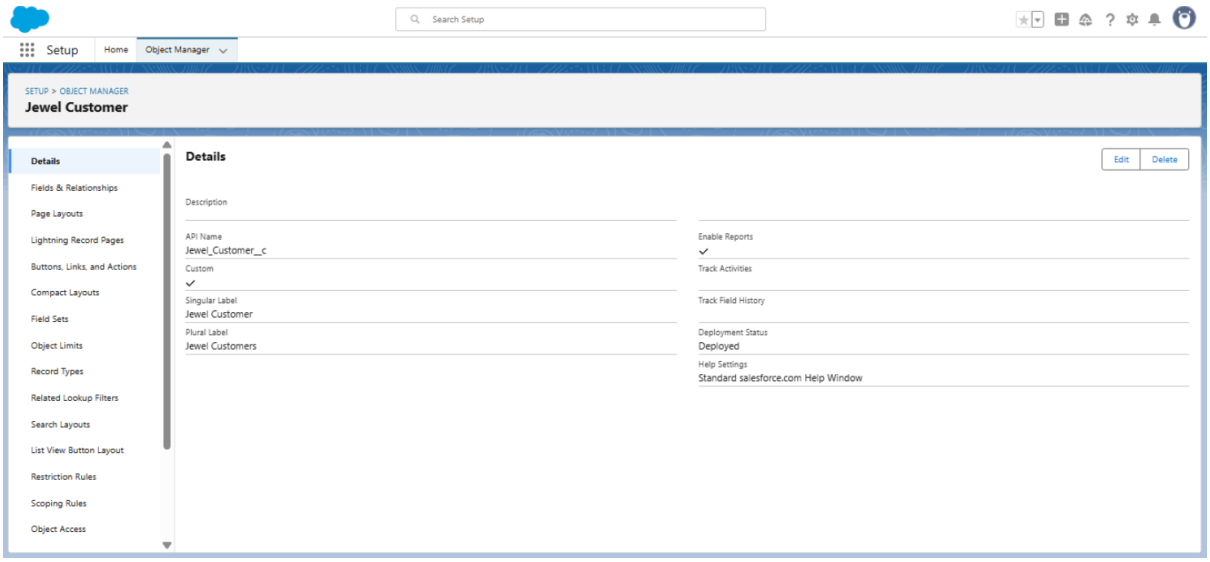


Account Activation

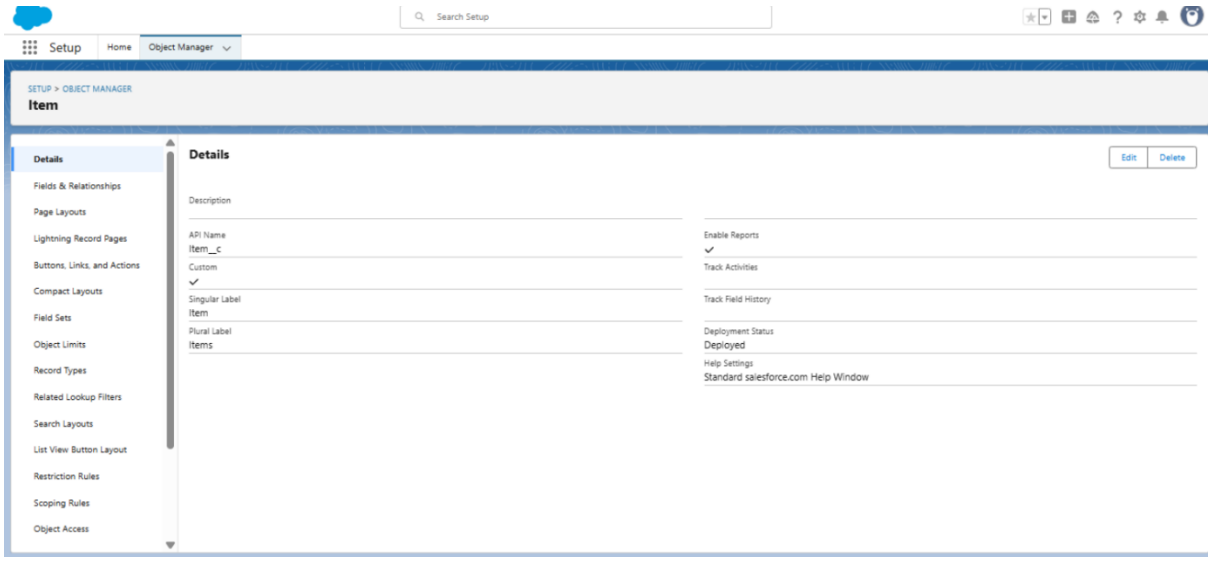


- **Object**

Create Jewel Customer Object

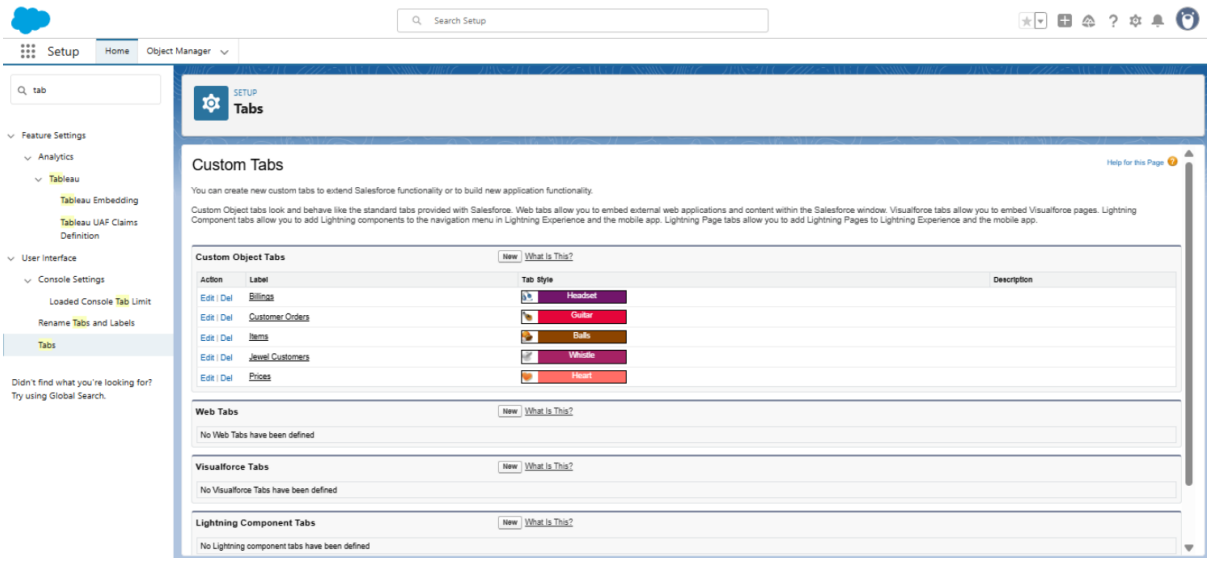


Create Item Object



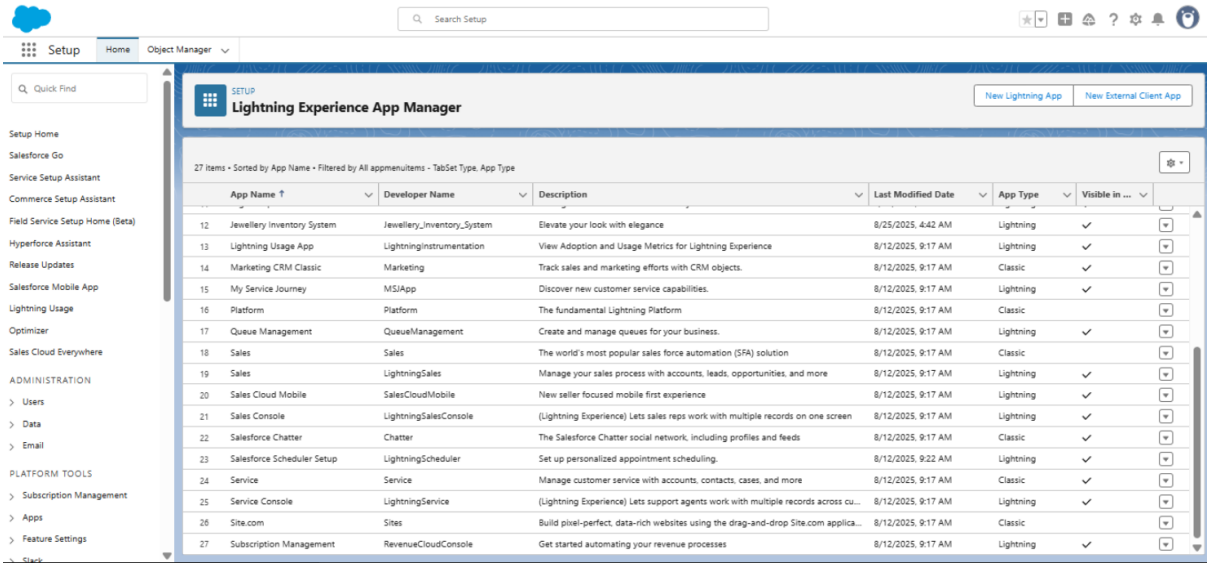
- **Tabs**

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

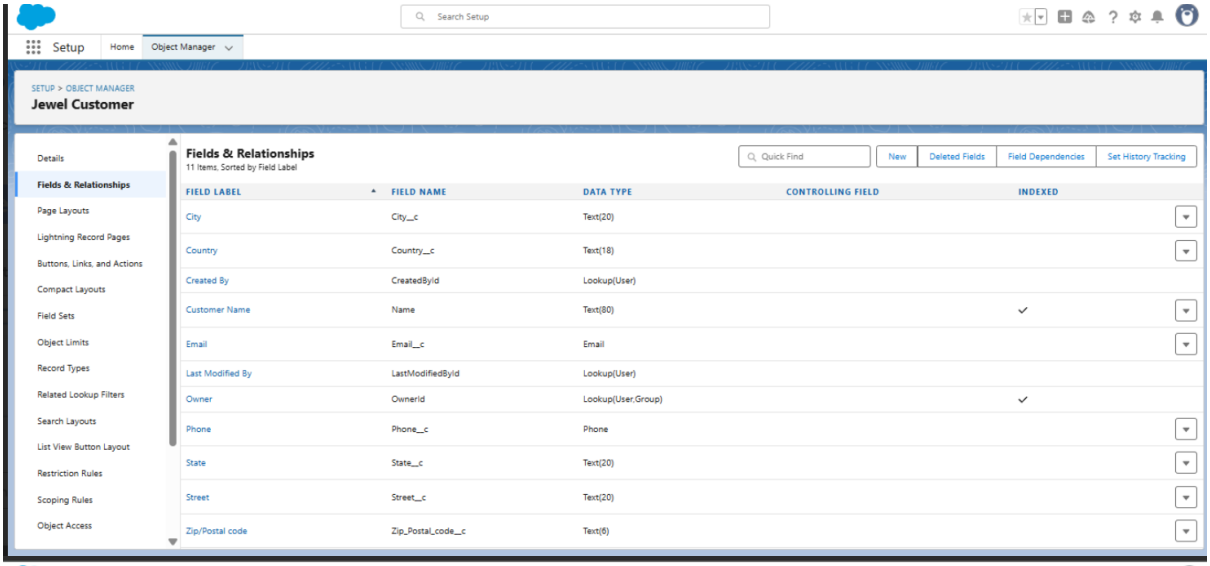


- **The Lightning App**

  Create a Lightning App



- **Fields**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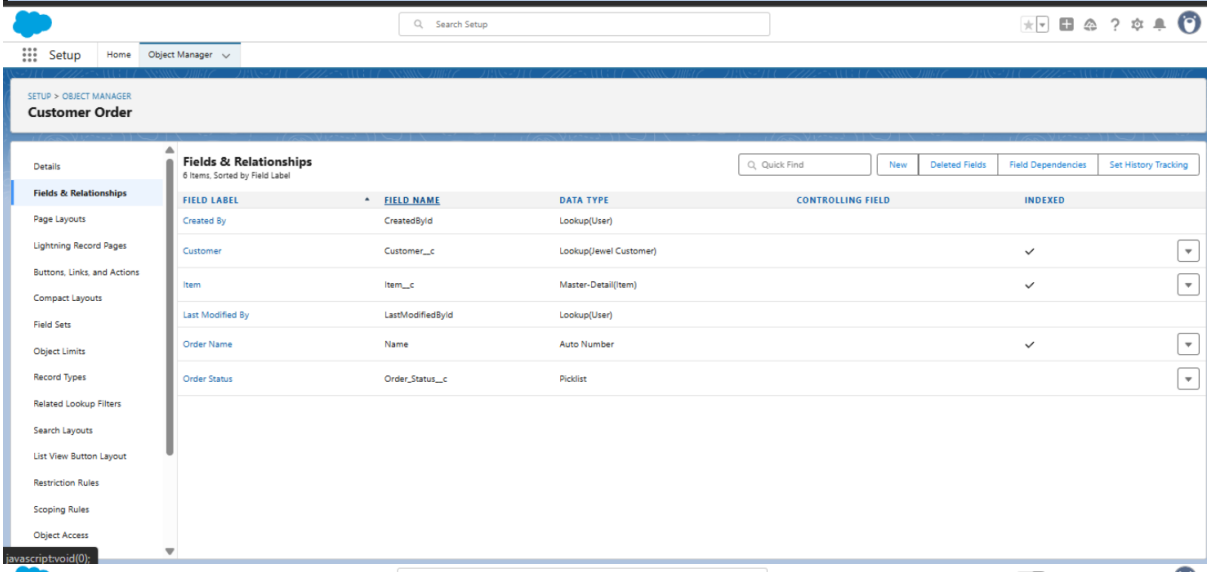
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Jewel Customer
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
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(6)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Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Customer Order
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
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
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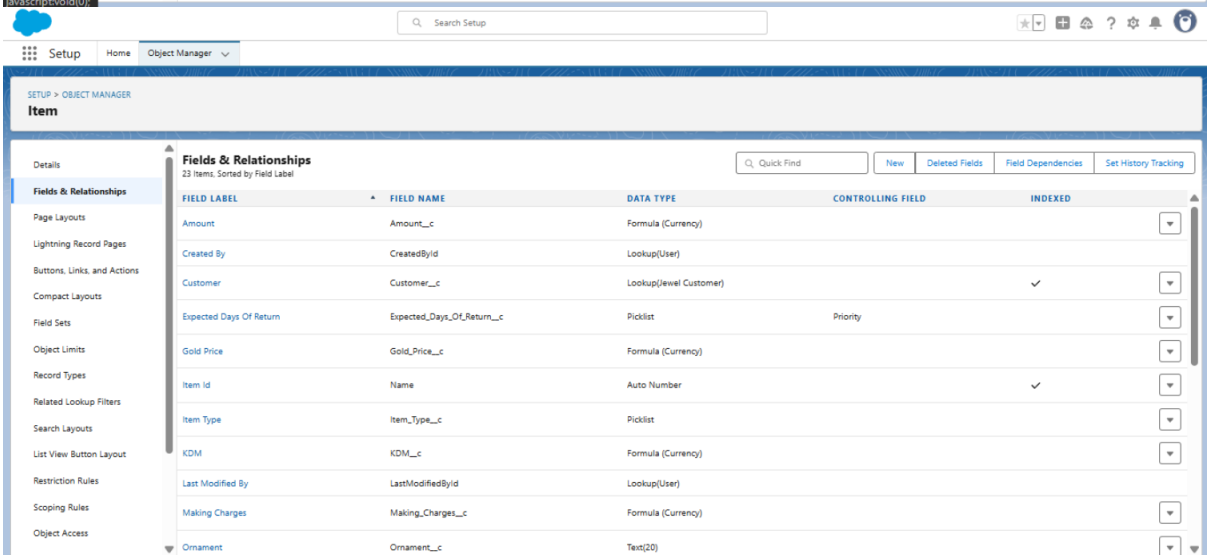
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Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Fields & Relationships
23 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History 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)
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LastModifiedById
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Making_Charges__c
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Ornament__c
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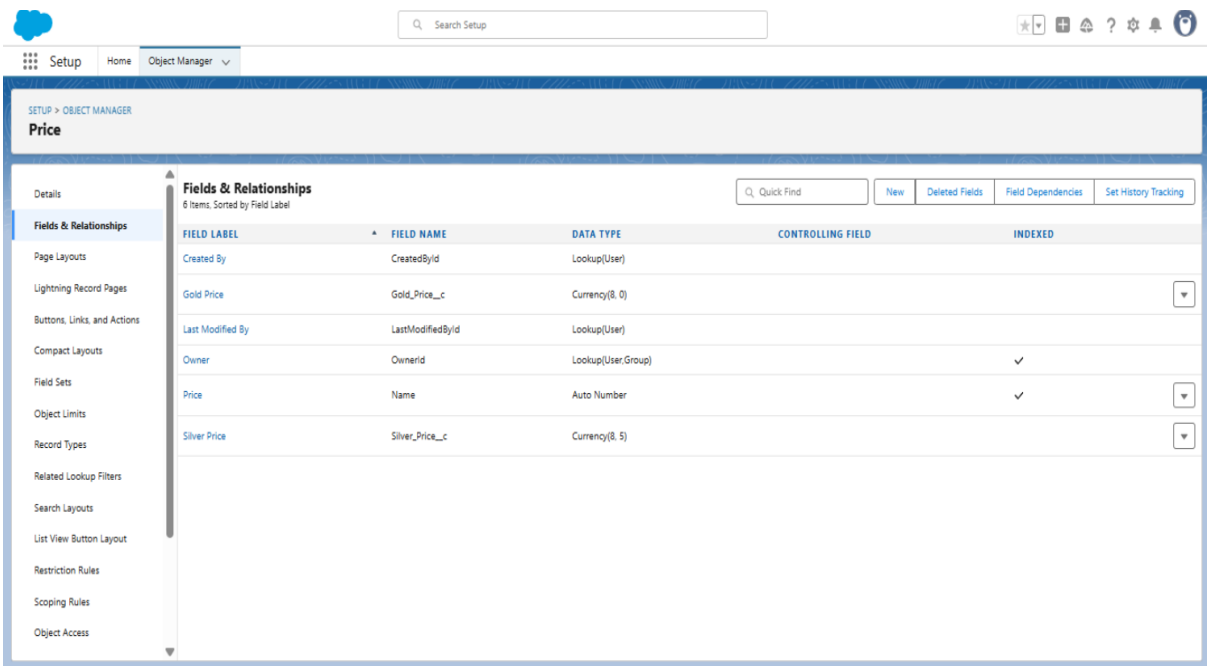
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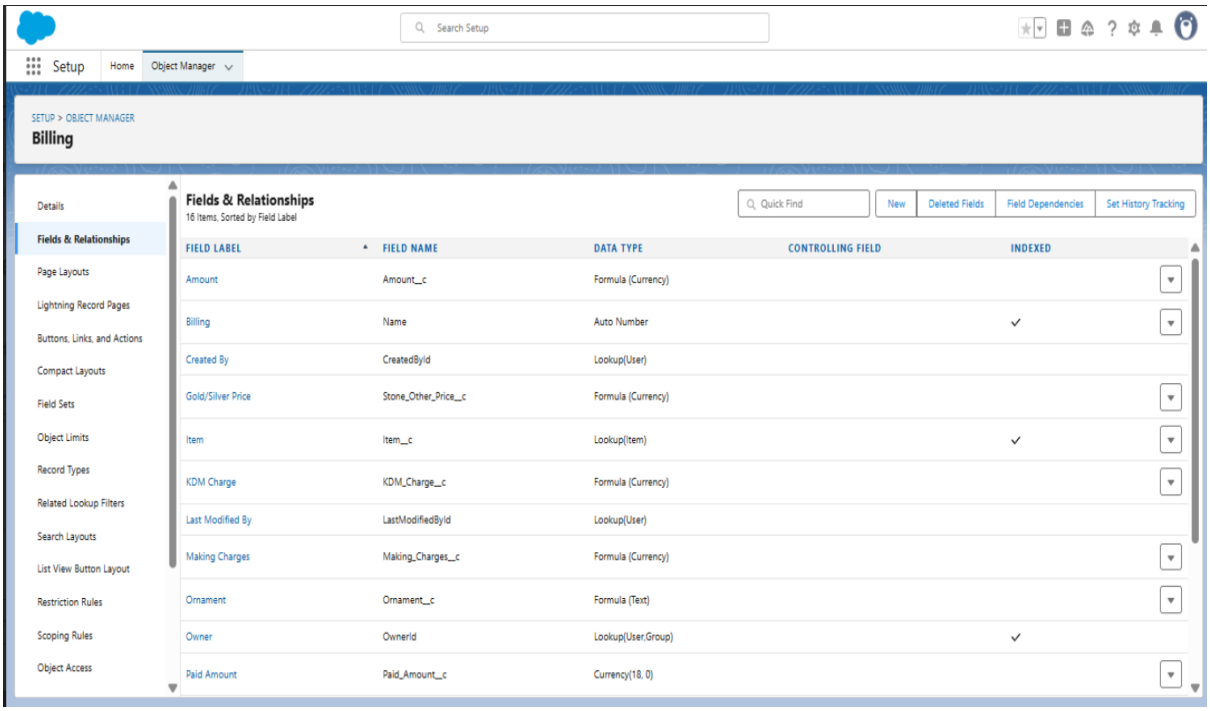
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Fields & Relationships
6 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
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)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Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
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Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Fields & Relationships
16 Items, Sorted by Field Label
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Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
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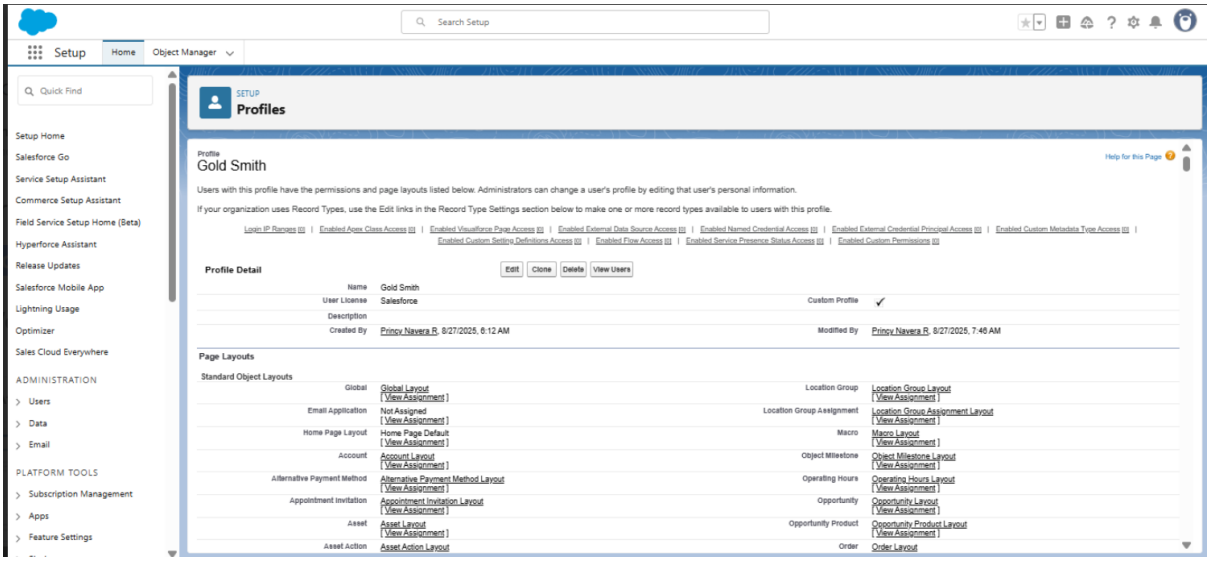
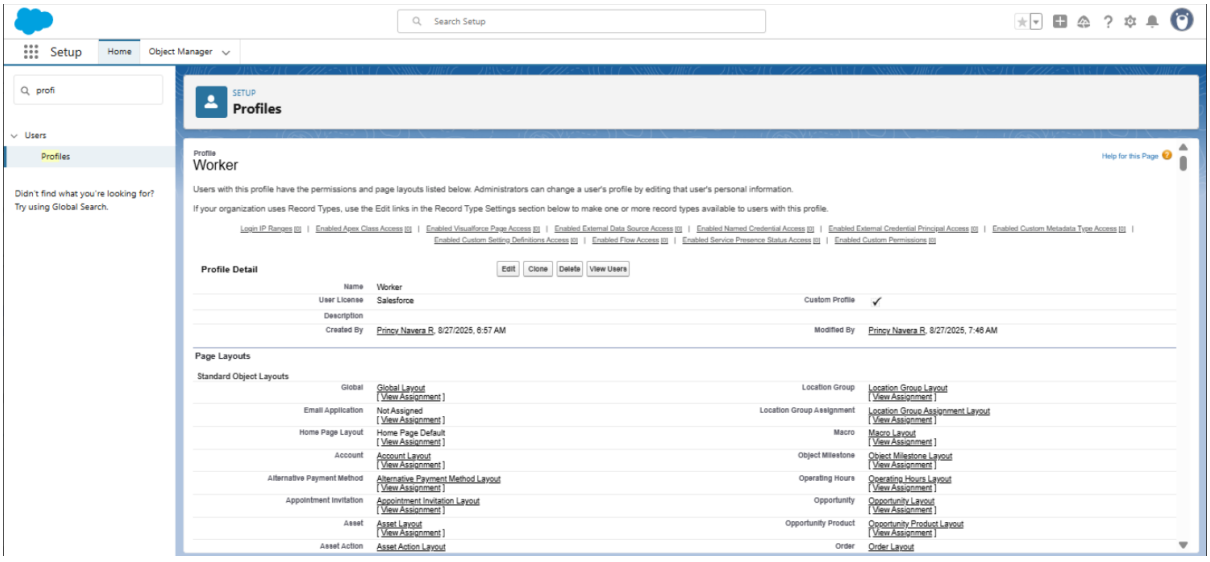
Amount
Amount__c
Formula (Currency)
Billing
Name
Auto Number
Created By
CreatedById
Lookup(User)
Gold/Silver Price
Stone_Other_Price__c
Formula (Currency)
Item
Item__c
Lookup(Item)
KDM Charge
KDM_Charge__c
Formula (Currency)
Last Modified By
LastModifiedById
Lookup(User)
Making Charges
Making_Charges__c
Formula (Currency)
Ornament
Ornament__c
Formula (Text)
Owner
OwnerId
Lookup(User,Group)
Paid Amount
Paid_Amount__c
Currency(18, 0)

- **Profiles**

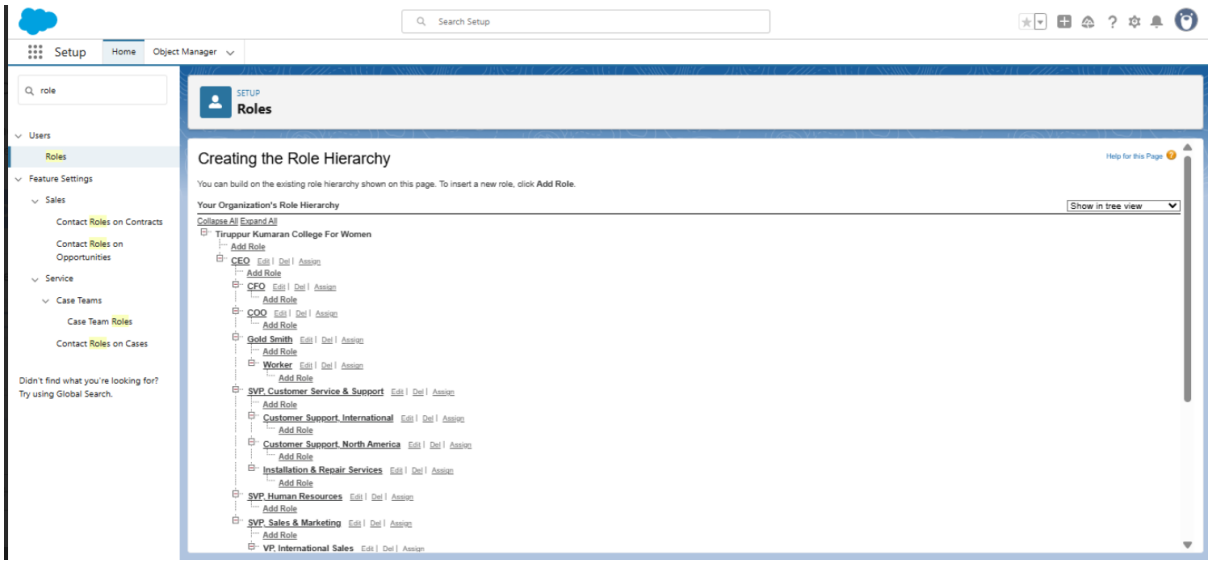
Gold Smith Profile



Worker Profile

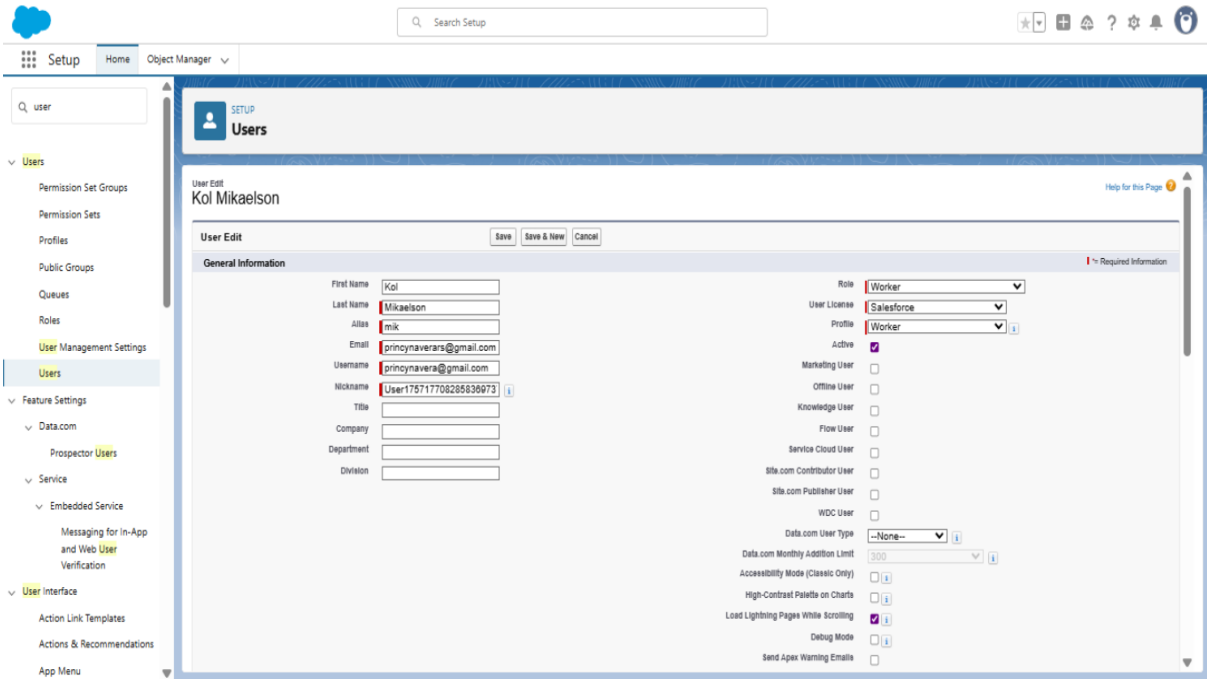


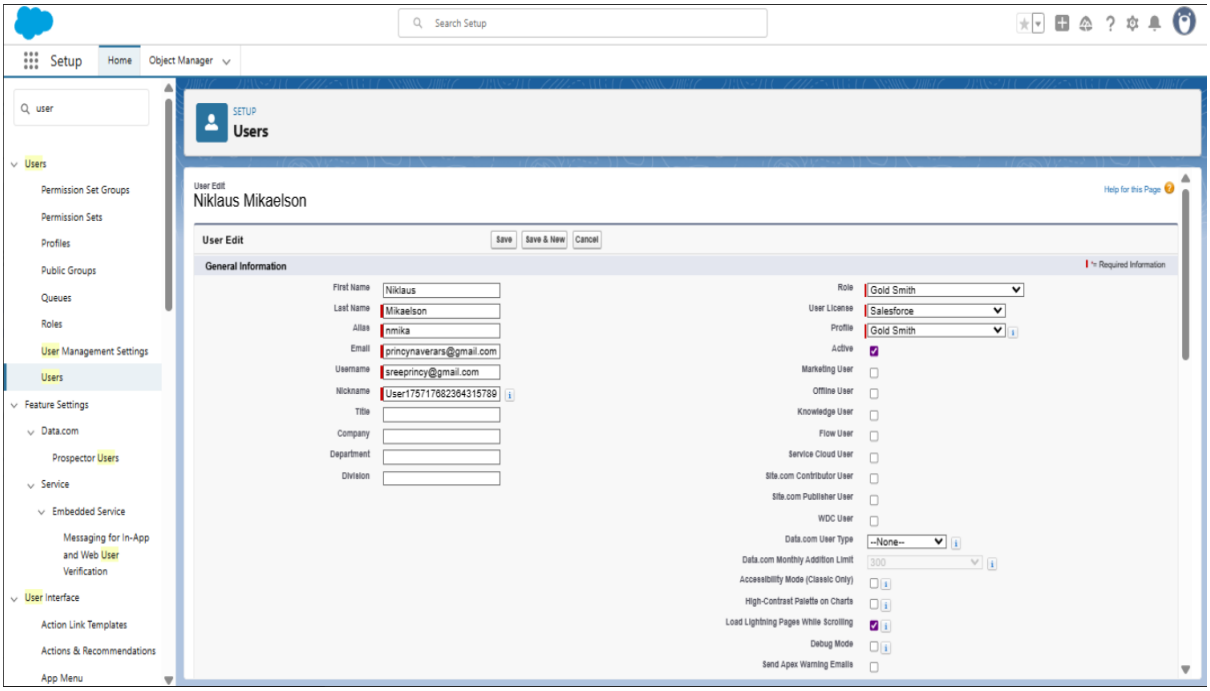
- **Roles**



- **Users**

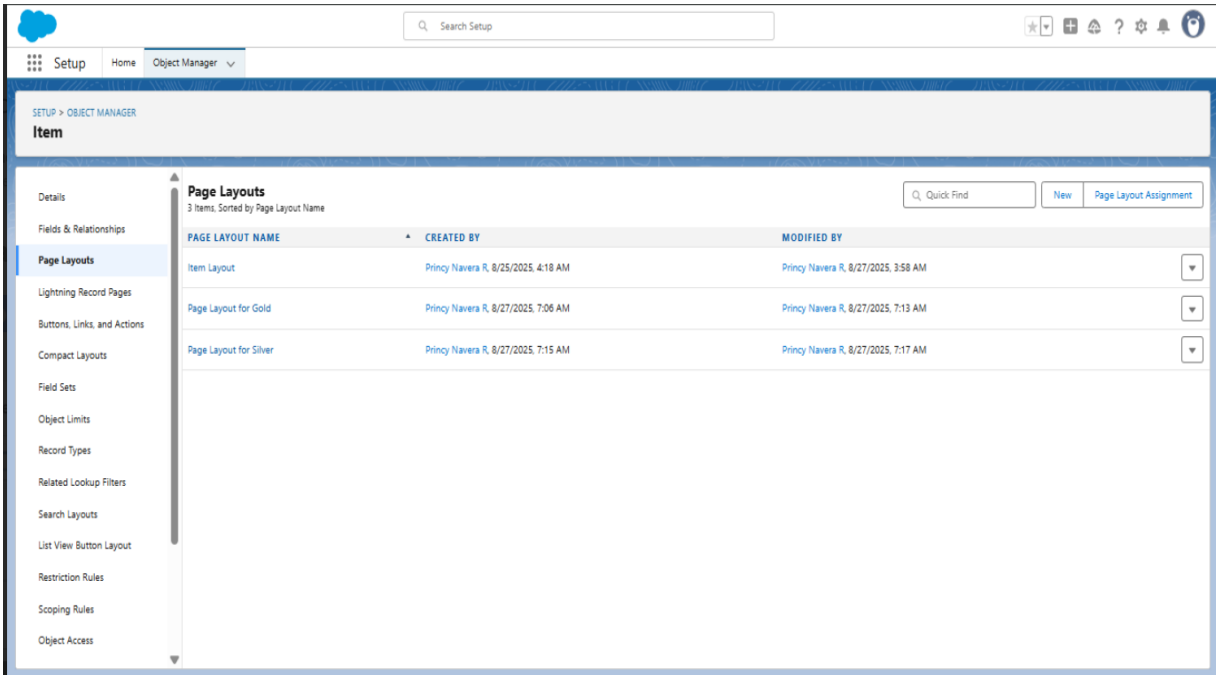
Create User





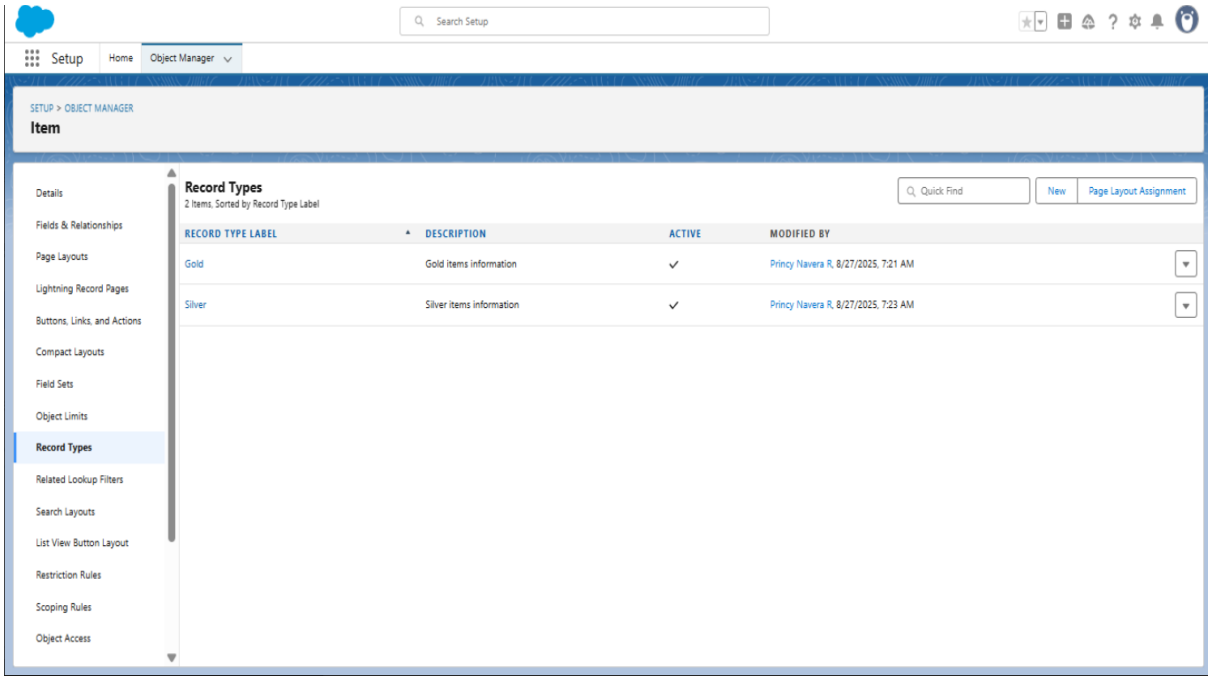
- **Page layouts**

To Create a Gold And Silver Page layout



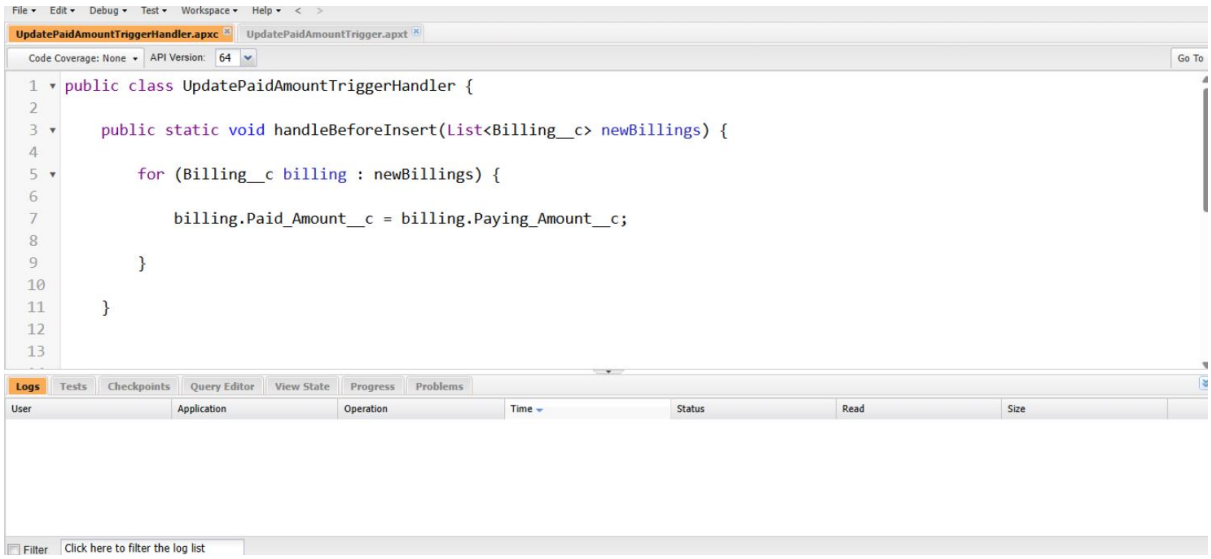
- **Record Types**

  To create a Record Type

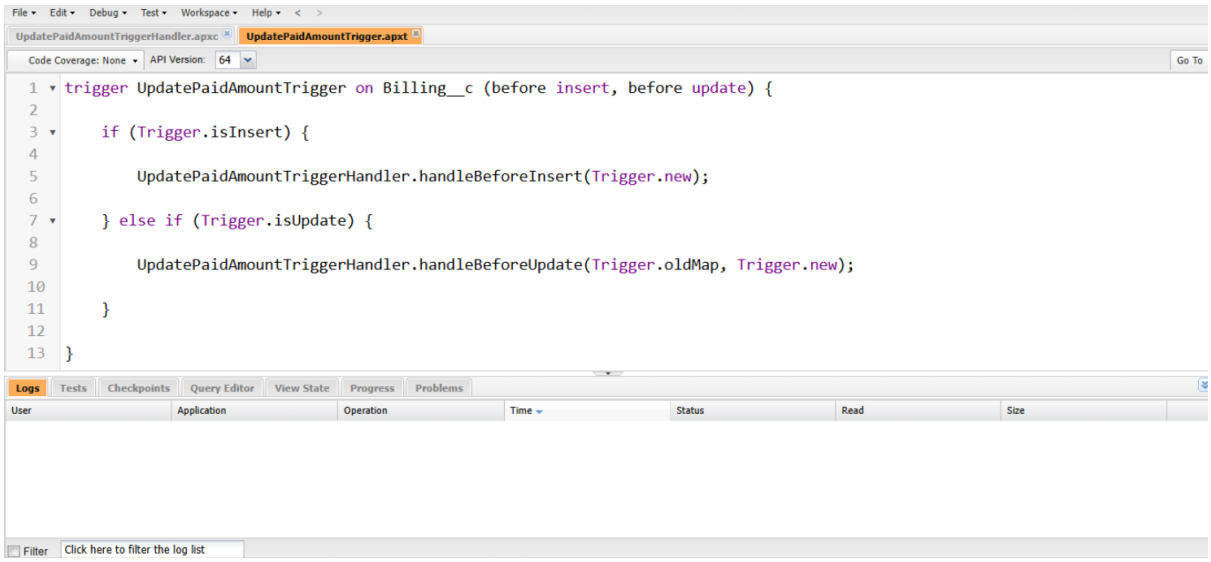


- **Trigger**

  Create a Trigger Handler class

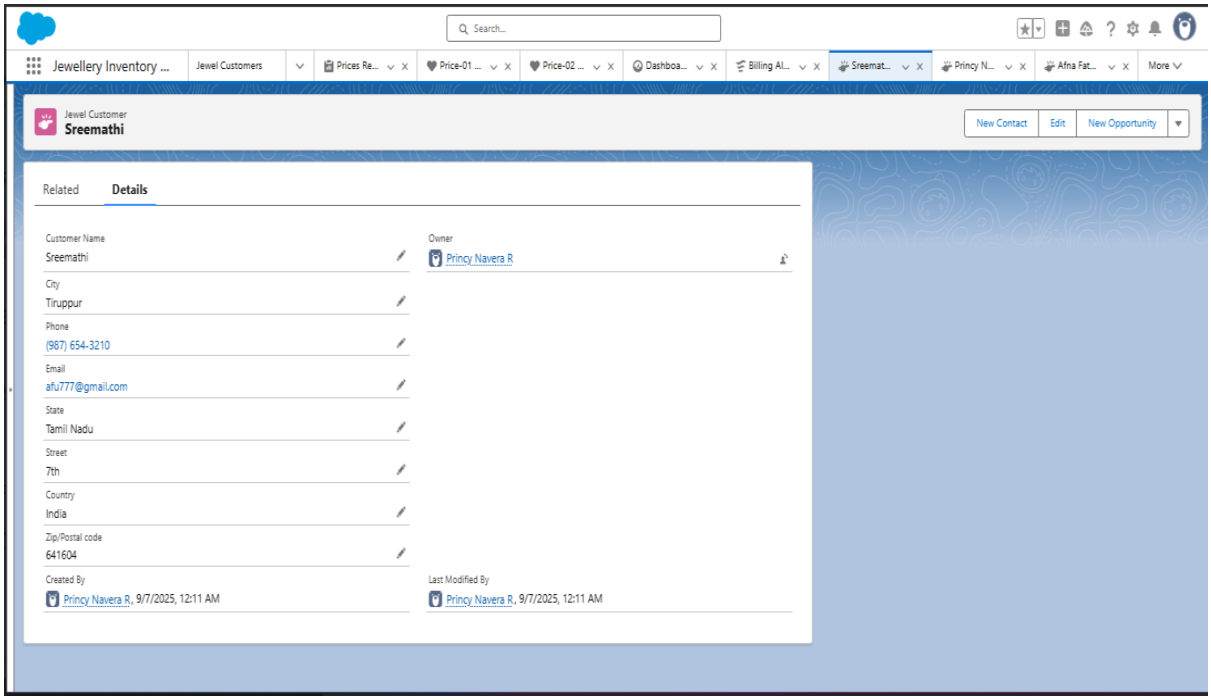


Create the trigger

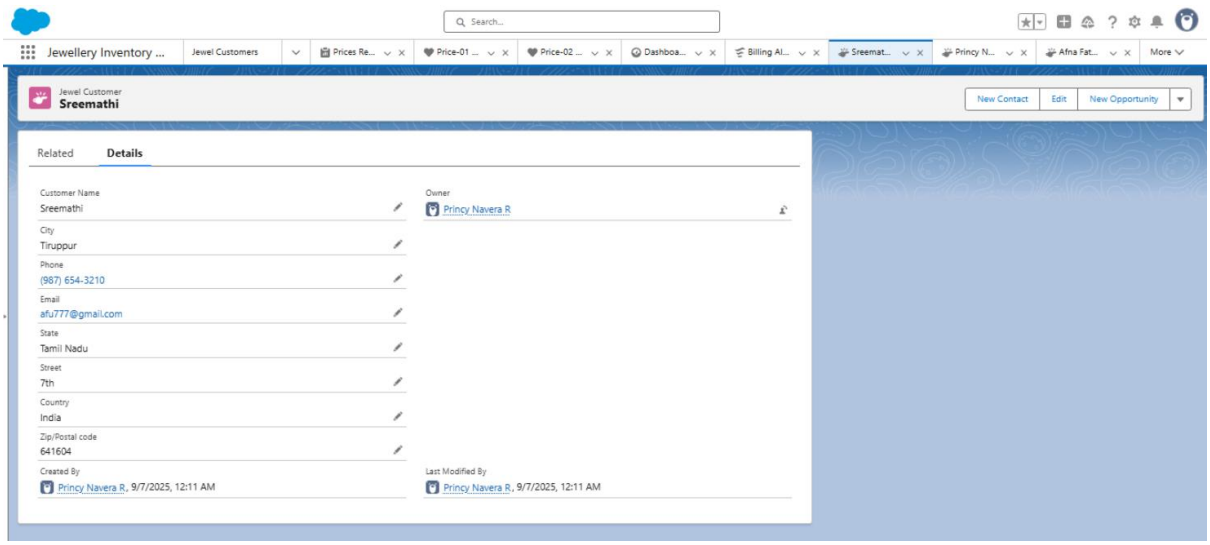


- **User Adoption**

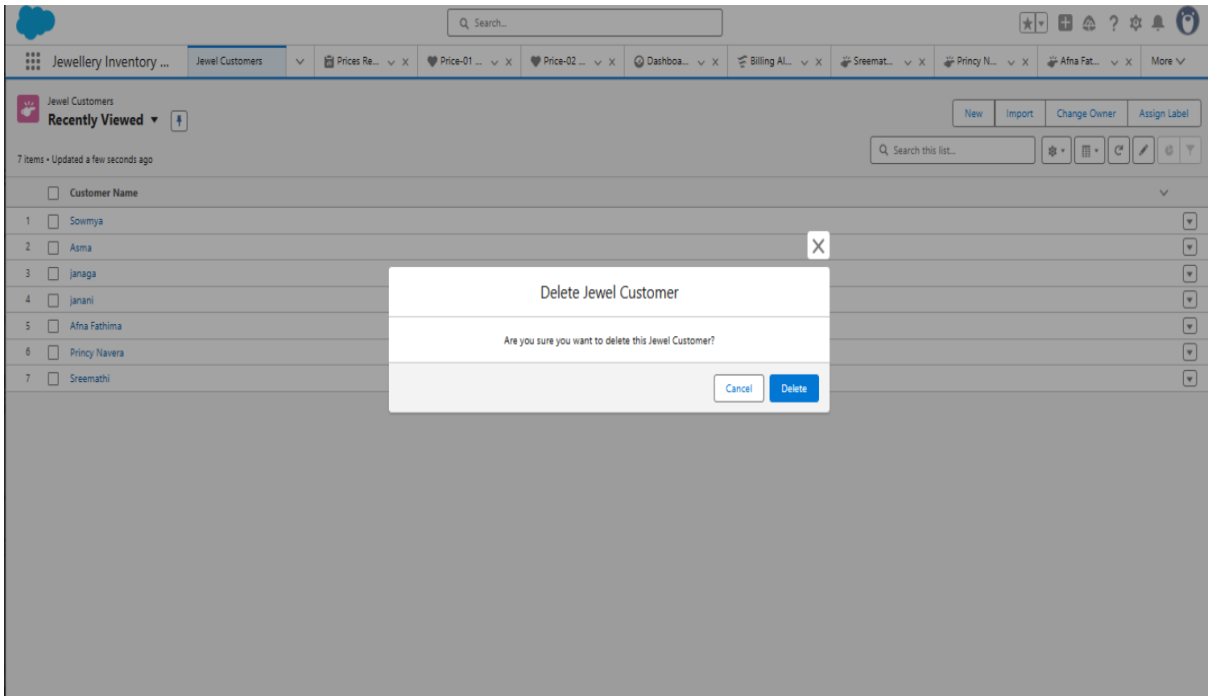
  Create a Record (Jewel Customer)



View a Record (Jewel Customer)

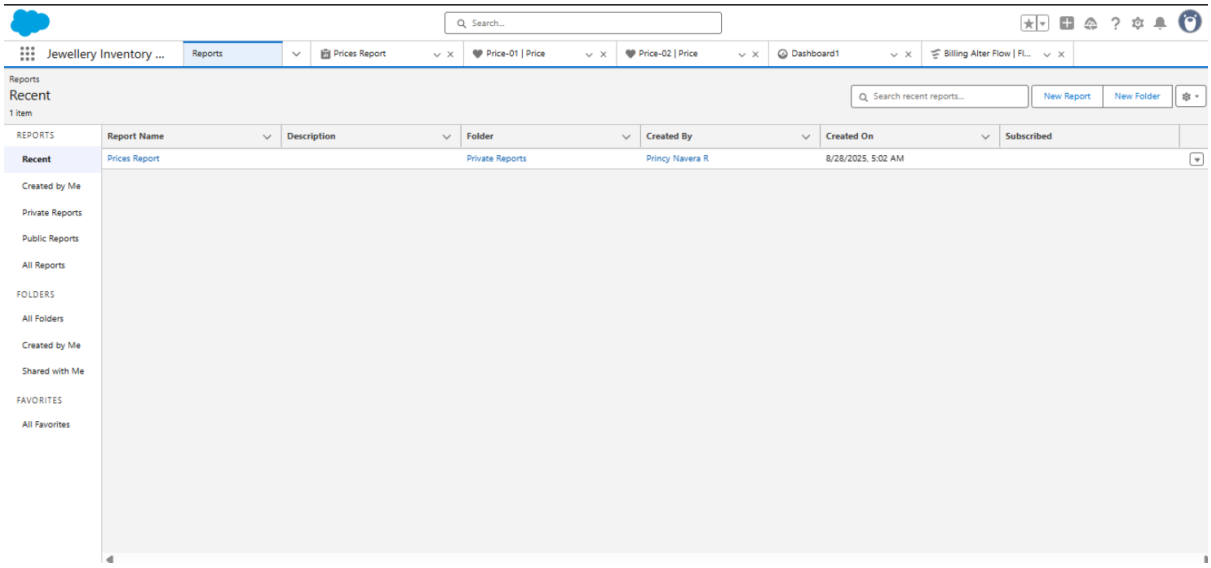


Delete a Record (Jewel Customer)

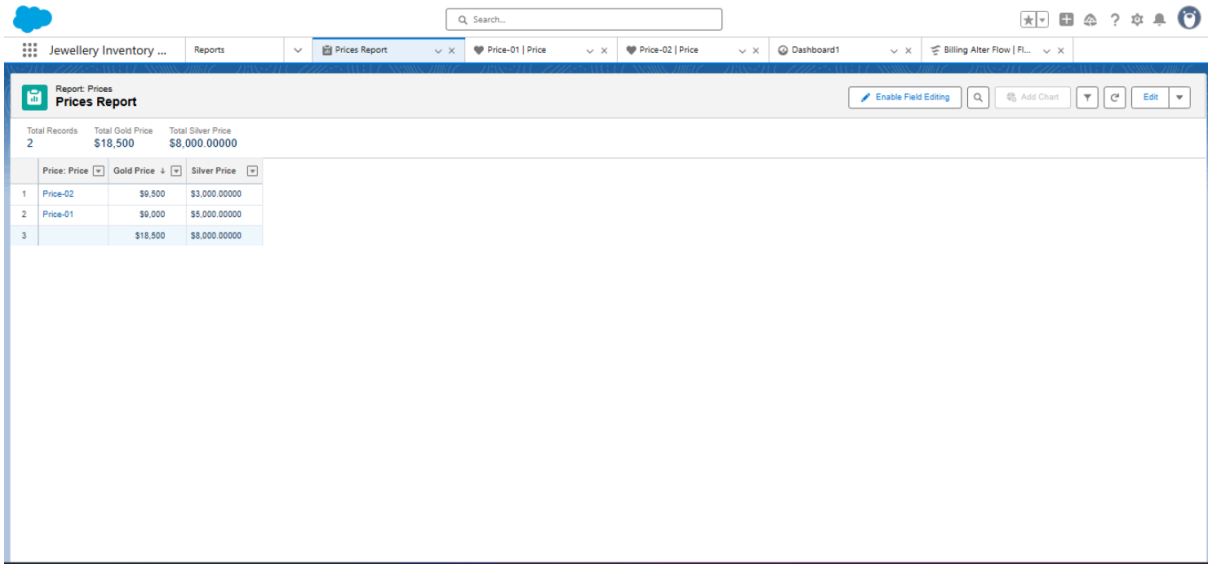


- **Reports**

  Create Report

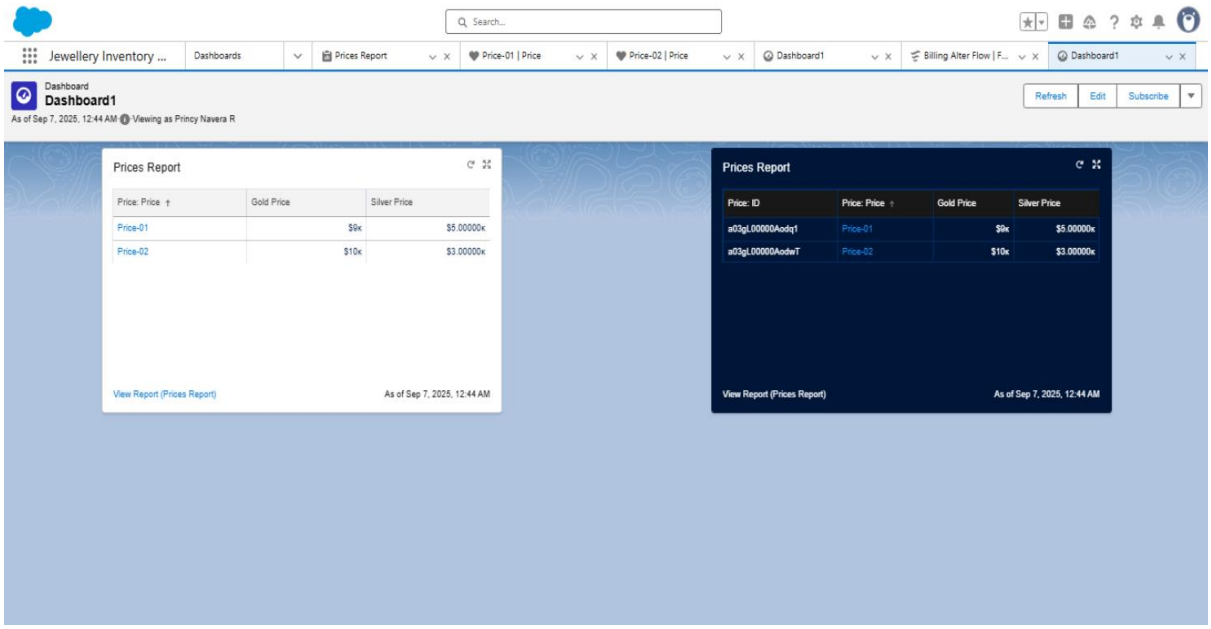


Reports



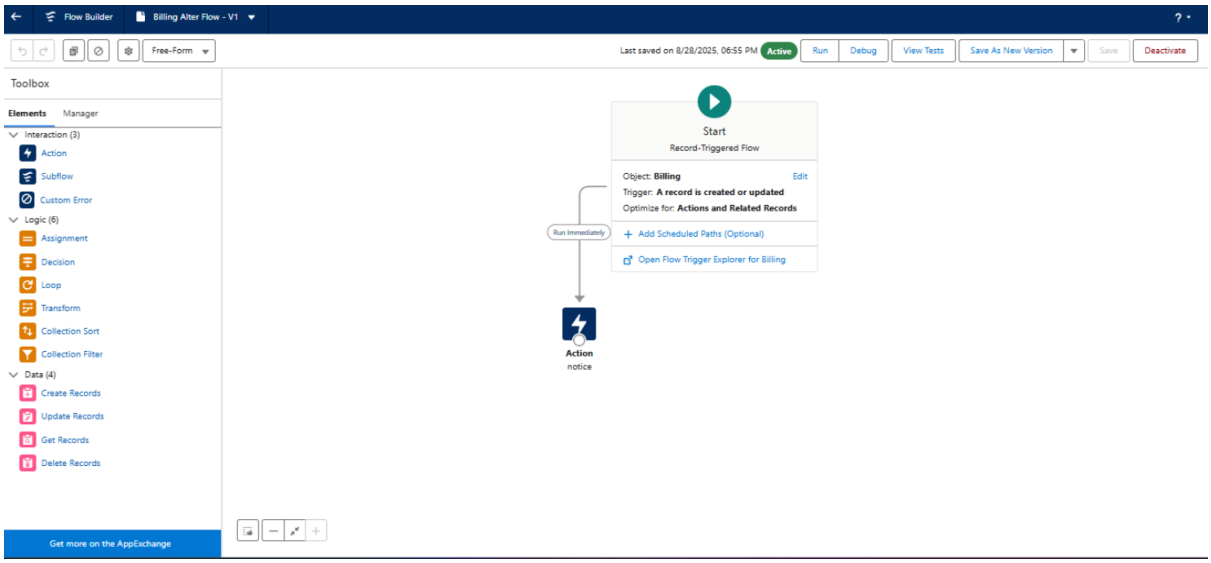
- **Dashboards**

  Create Dashboard



- **FLOW**

  CREATE FLOW



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 SUCCESFULLY DEVELPOED 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, PROVIDIND A STREAMLINED, USER FRIENDLY SOLUTION FOR JEWEL MANAGEMENT AND SUPPORTING IMPROVED BUSINESS PROCESSES.