

## DASHBOARD AND REPORTS

|                     |                                      |
|---------------------|--------------------------------------|
| <b>Date</b>         | 05 November 2025                     |
| <b>Team Id</b>      | NM2025TMID04354                      |
| <b>Project Name</b> | CRM Application for Jewel Management |

Salesforce Dashboards provide actionable insights into jewelry sales and business performance. Customer dashboards were created for each user role to track KPIs.

### Dashboards:

- **Sales Performance Dashboard:** Displays daily, monthly, and yearly sales summaries.
- **Inventory Dashboard:** Monitors stock availability, jewelry category trends, and low-stock items.
- **Customer Analytics Dashboard:** Tracks loyal customers, new customers, and repeat purchase frequency.

The screenshot shows a Salesforce dashboard titled "Dashboard 2". A report titled "New Prices Report gp" is displayed, showing a table of jewelry items with their price names, silver price, and gold price. The table data is as follows:

| Price: Price Name | Silver Price | Gold Price |
|-------------------|--------------|------------|
| Item-C1           | \$5.0000x    | \$10k      |
| Item-C2           | \$8.0000x    | \$60k      |
| Item-C3           | \$7.0000x    | \$70k      |
| Item-C4           | \$2.0000x    | \$20k      |
| Item-C5           | \$9.0000x    | \$90k      |
| Item-C6           | \$1.0000x    | \$10k      |
| Item-C7           | \$9.8800x    | \$95k      |



Jewellery Inventory System | Billings | ▼ |  New Pr... ▼ X |  New It... ▼ X |  Bi

**Report: Prices**  
**New Prices Report gp**  
gold and silver price

| Total Records | Total Silver Price | Total Gold Price |
|---------------|--------------------|------------------|
| 10            | \$77,370.00000     | \$480,100        |

|   | Price: Price Name ↑ ▾ | Silver Price ▾ | Gold Price ▾ |
|---|-----------------------|----------------|--------------|
| 1 | Item-01               | \$5,000.00000  | \$10,000     |
| 2 | Item-02               | \$6,000.00000  | \$60,000     |
| 3 | Item-03               | \$7,000.00000  | \$70,000     |
| 4 | Item-04               | \$2,000.00000  | \$20,000     |
| 5 | Item-05               | \$9,000.00000  | \$90,000     |
| 6 | Item-06               | \$1,000.00000  | \$10,000     |
| 7 | Item-07               | \$9,880.00000  | \$65,500     |
| 8 | Item-08               | \$3,200.00000  | \$8,900      |
| 9 | Item-09               | \$21,890.00000 | \$67,000     |

## Reports:

- Customer Purchase History Report
- Pending Payments Report
- Top-Selling Jewelry Report
- Monthly Revenue Summary



Jewellery Inventory System | Reports | ▼ |  New Pri

**Report: Billings with Item and Customer Order**  
**New Report billings**

| Total Records | Total Gold/Silver Price |
|---------------|-------------------------|
| 10            | \$13,023.00             |

|    | Billing Name ▾ | Gold/Silver Price ▾ | Owner: Full Name ▾ | Item: Item Id ▾ |
|----|----------------|---------------------|--------------------|-----------------|
| 1  | Item-01        | \$9.00              | Niklaus Mikaelson  | Item-10         |
| 2  | Item-02        | \$1,000.00          | Niklaus Mikaelson  | Item-09         |
| 3  | Item-03        | \$1,000.00          | Niklaus Mikaelson  | Item-08         |
| 4  | Item-04        | \$6.00              | Niklaus Mikaelson  | Item-07         |
| 5  | Item-05        | \$1.00              | Niklaus Mikaelson  | Item-06         |
| 6  | Item-06        | \$2,000.00          | Niklaus Mikaelson  | Item-05         |
| 7  | Item-07        | \$7.00              | Niklaus Mikaelson  | Item-02         |
| 8  | Item-08        | \$2,000.00          | Niklaus Mikaelson  | Item-05         |
| 9  | Item-09        | \$1,000.00          | Niklaus Mikaelson  | Item-01         |
| 10 | Item-10        | \$6,000.00          | Niklaus Mikaelson  | Item-03         |
| 11 |                | \$13,023.00         |                    |                 |

These insights help business owners make data-driven decisions and forecast future sales trends effectively.