

CRM Application for Jewel Management

SRI KRISHNA ADITHYA COLLEGE OF ARTS AND SCIENCE

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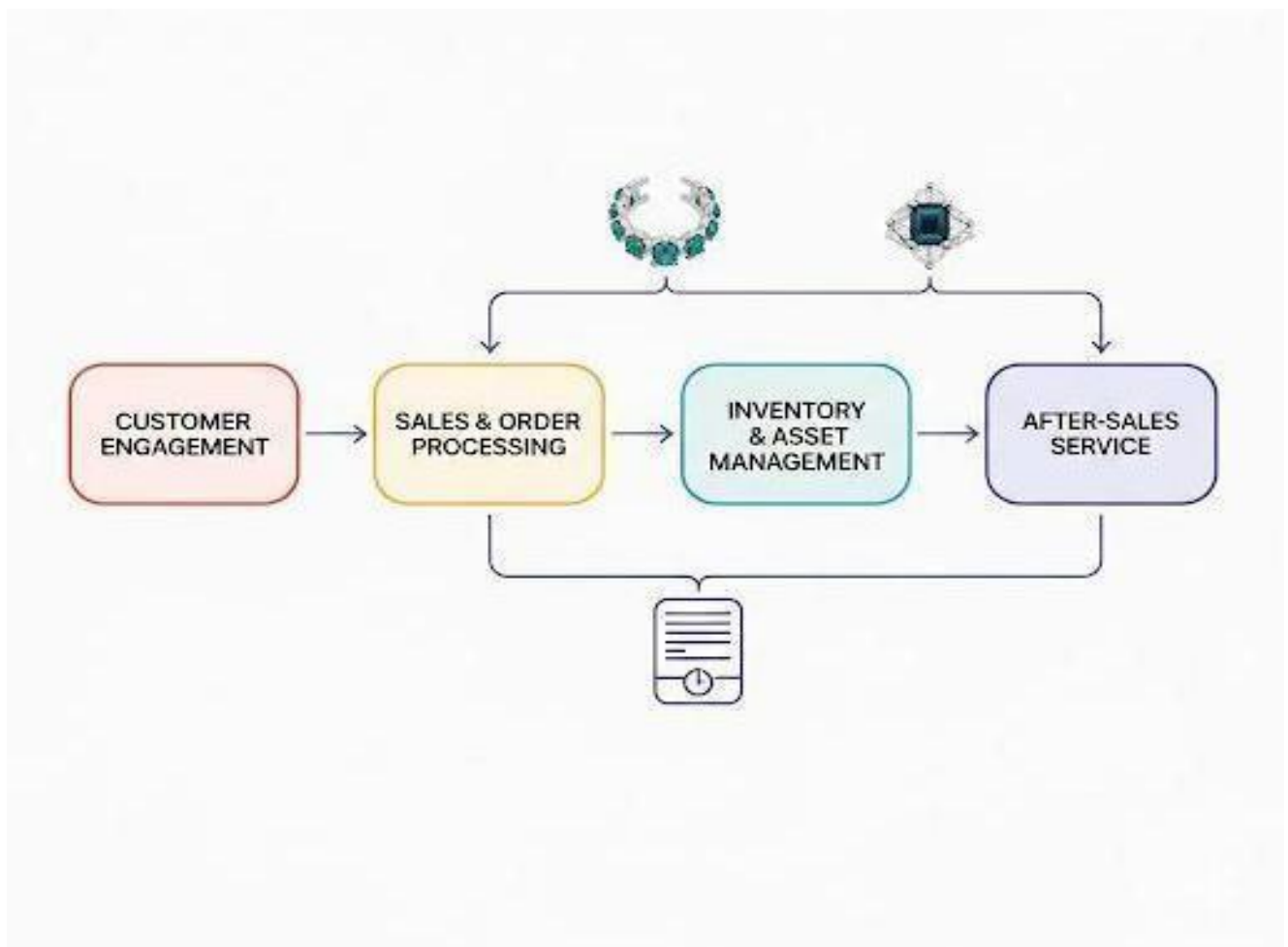
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1.INTRODUCTION

1.1 Project Overview

The CRM Application for Jewel Management is designed to help jewelry businesses efficiently handle **customer relationships, inventory, and sales** in a single platform. It enables jewelers to manage **customer data, purchase history, product catalog, billing, and order tracking** while also sending personalized offers and reminders.



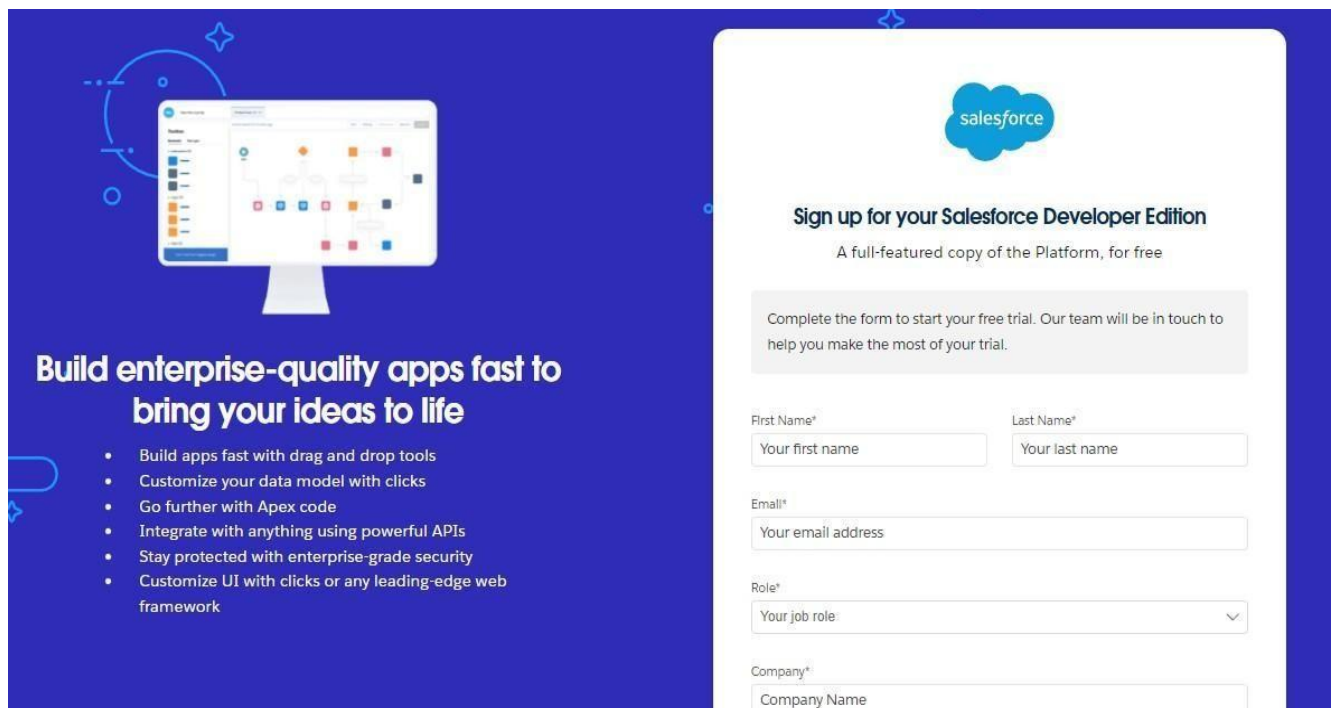
1.2 Purpose

The main purpose of the CRM Application for Jewel Management is to streamline jewelry business operations by combining customer management, sales, and inventory in one platform. It helps jewelers track customer details, purchase history, and preferences while managing stock efficiently. The system also automates billing, payments, and order tracking, along with sending reminders and personalized offers. Overall, it improves business efficiency, enhances customer satisfaction, and supports better decision-making through reports and analytics.

DEVELOPMENT PHASE

Creating Developer Account

By using this URL - <https://developer.salesforce.com/signup>

The image shows a promotional banner for Salesforce Developer Edition on the left and a sign-up form on the right. The banner has a blue background with a white monitor displaying a Salesforce interface. The sign-up form is white with a blue Salesforce logo at the top. It includes fields for First Name, Last Name, Email, Role (a dropdown menu), and Company Name. A grey box with text is positioned above the form fields.

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
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- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
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Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

Account Activation

Change Your Password

Enter a new password for **lead@sb.oom**.
Make sure to include at least:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

* New Password
[password field] Good

* Confirm New Password
[password field] Match

Security Question
▼ In what city were you born?

* Answer
[answer field] asdfghjkl

Change Password

- This will redirect to your salesforce setup page.
- Objects such as Jewel Customer, Item, Customer Order, Price, Billing are created.

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the 'Price' object is selected. The left sidebar contains a list of setup categories: 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, Flow Triggers, Validation Rules, and Conditional Field Formatting. The main content area displays the 'Details' for the 'Price' object, including fields like API Name (Price_c), Custom, Singular Label (Price), Plural Label (Prices), and various system settings like Enable Reports, Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 18:05 on 14-09-2025.

Browser tabs: Welcome to Salesforce: Reset, Student, Item | Salesforce

Address bar: orgfarm-24cc71ce16-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002Bh6v/Details/view

Search Setup

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
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers
- Validation Rules
- Conditional Field Formatting

Details

Edit Delete

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

Search Setup

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

Details

Edit Delete

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

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

Price

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

Details

Description

API Name
Price__c

Custom
✓

Singular Label
Price

Plural Label
Prices

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

Billing

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

Details

Description

API Name
Billing__c

Custom
✓

Singular Label
Billing

Plural Label
Billings

Enable Reports
✓

Track Activities

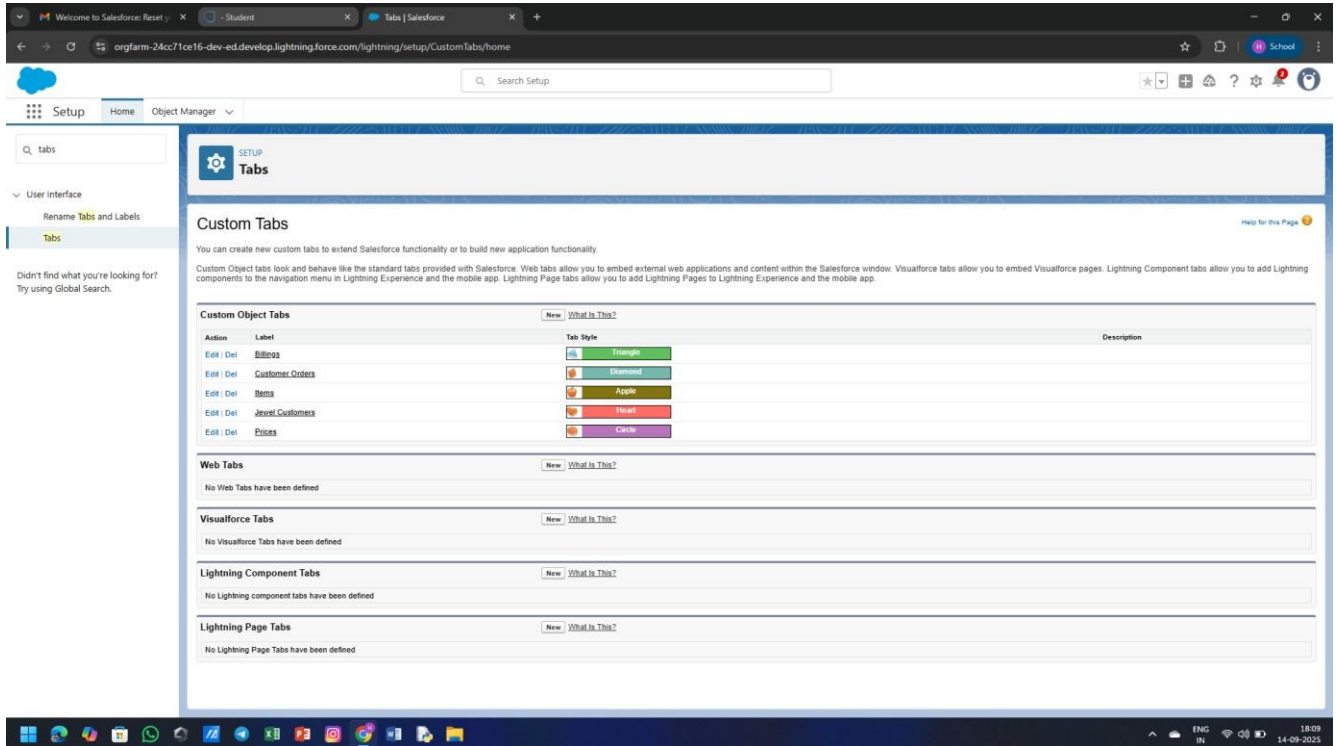
Track Field History

Deployment Status
Deployed

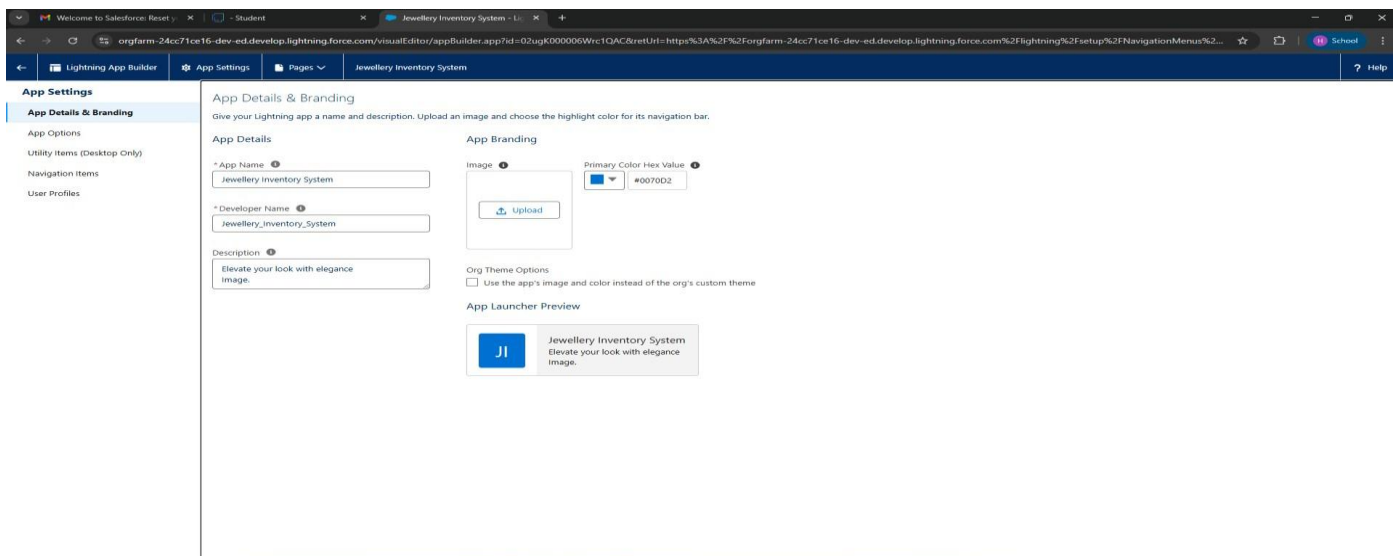
Help Settings
Standard salesforce.com Help Window

Edit Delete

- Custom Tab for Jewel Customer ,Item, Customer Order, Price, Billing objects are created.



- Lightning App is been developed with the name “Jewellery Inventory System”.



App Name	Developer Name	Description	Last Modified Date	App Type	Visible in Lightning Experience
Automation	FlowApp	Automate business processes and repetitive tasks.	9/9/2025, 1:21 PM	Lightning	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	9/9/2025, 1:16 PM	Lightning	✓
Community	Community	Salesforce CRM Communities	9/9/2025, 1:16 PM	Classic	✓
Content	Content	Salesforce CRM Content	9/9/2025, 1:16 PM	Classic	✓
Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	9/9/2025, 1:16 PM	Lightning	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	9/9/2025, 1:16 PM	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	9/9/2025, 1:16 PM	Lightning	✓
Jewellery Inventory System	Jewellery_Inventory_System	Elevate your look with elegance image.	9/12/2025, 1:46 AM	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	9/9/2025, 1:16 PM	Lightning	✓
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	9/9/2025, 1:16 PM	Classic	✓
My Service Journey	MSIApp	Discover new customer service capabilities.	9/9/2025, 1:16 PM	Lightning	✓
Platform	Platform	The fundamental Lightning Platform	9/9/2025, 1:16 PM	Classic	✓
Queue Management	QueueManagement	Create and manage queues for your business.	9/9/2025, 1:16 PM	Lightning	✓
Sales	Sales	The world's most popular sales force automation (SFA) solution	9/9/2025, 1:16 PM	Classic	✓
Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	9/9/2025, 1:16 PM	Lightning	✓
Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	9/9/2025, 1:16 PM	Classic	✓
Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	9/9/2025, 1:19 PM	Lightning	✓
Service	Service	Manage customer service with accounts, contacts, cases, and more	9/9/2025, 1:16 PM	Classic	✓

- Creating fields such as Customer,Item in the Customer Order

Customer Order

Customer

Back to Customer Order

Validation Rules 0

Custom Field Definition Detail

Field Information

Field Label	Customer	Object Name	Customer Order
Field Name	Customer	Data Type	Lookup
API Name	Customer__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Muhith K	Modified By	Muhith K
	9/12/2025, 1:49 AM		9/12/2025, 1:49 AM

Lookup Options

Related To	Parent Customer	Child Relationship Name	Customer_Orders
Related List Label	Customer Orders		
Required			
What to do if the lookup record is deleted?	Clear the value of this field.		

Lookup Filter

No lookup filters defined.

Validation Rules

No validation rules defined.

Always show me more records per related list

Customer Order Custom Field Definition Detail

Field Information

Field Label	Customer	Object Name	Customer Order
Field Name	Customer	Data Type	Lookup
API Name	Customer__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Muhith k, 8/12/2025, 1:49 AM	Modified By	Muhith k, 8/12/2025, 1:49 AM

Lookup Options

Related To	Jewel Customer	Child Relationship Name	Customer_Orders
Related List Label	Customer Orders		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	<input type="checkbox"/> Clear the value of this field.		

Lookup Filter

No lookup filters defined.

Validation Rules

No validation rules defined.

Always show me more records per related list

- Creating fields such as City, Phone, Email, Purity in Jewel Customer Object.

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(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)		

Welcome to Salesforce: Reset y x - Student x Item | Salesforce x +

orgfarm-24cc71ce16-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002Bh6v/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Item

Details 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
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)		
Owner	OwnerId	Lookup(User, Group)		
Percentage	Percentage__c	Number(2, 0)		
Prices	Prices__c	Lookup(Price)		
Priority	Priority__c	Picklist		
Purity	Purity__c	Number(2, 0)		
Purity Gold Price	Purity_Gold_Price__c	Formula (Currency)		
Record Type	RecordTypeId	Record Type		
Silver Price	Silver_Price__c	Formula (Number)		

- Creating Picklist Field in the Item Object

Welcome to Salesforce: Reset y x - Student x Price | Salesforce x +

orgfarm-24cc71ce16-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002BINx/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Price

Details 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	CreatedBy	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)		

- Creating Field Dependencies.

SETUP > OBJECT MANAGER

Item

Details

Fields & Relationships
23 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

Field Name	API Name	Data Type	Relationships
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)	
Owner	OwnerId	Lookup(User,Group)	✓
Percentage	Percentage__c	Number(2, 0)	
Prices	Prices__c	Lookup(Price)	✓
Priority	Priority__c	Picklist	
Purity	Purity__c	Number(2, 0)	
Purity Gold Price	Purity_Gold_Price__c	Formula (Currency)	
Record Type	RecordTypeId	Record Type	✓
Silver Price	Silver_Price__c	Formula (Number)	

- Creating validation rule for Jewel Customer object and for Item object.

Welcome to Salesforce: ResetStudentPrice | Salesforce

orgfarm-24cz71ce16-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gKD00002BINv/FieldsAndRelationships/view

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Price

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

Flow Triggers

Validation Rules

Conditional Field Formatting

Fields & Relationships

6 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
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

Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Item Custom Field

Gold Price

Back to Item

Help for this Page

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Gold Price	Object Name	Item
Field Name	Gold_Price		
API Name	Gold_Price__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Mohith k, 9/13/2025, 6:42 AM	Modified By	Mohith k, 9/13/2025, 6:42 AM

Formula Options

Data Type	Formula
Decimal Places	2

Prices__r.Gold_Price__c / 10

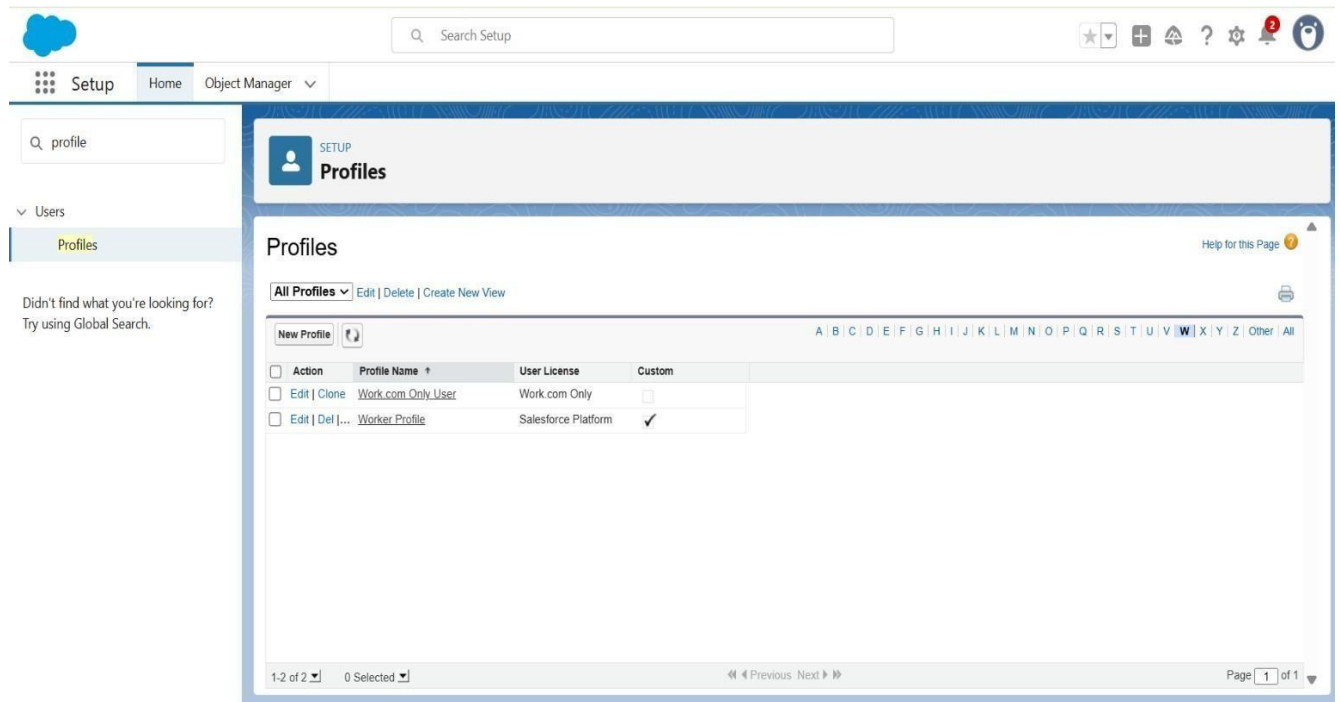
- Creating Gold smith profile and Worker profile.
- Creating Role as Gold Smith and Worker.

The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. The left sidebar contains a search bar with 'roles' and a navigation menu with 'Users', 'Roles', 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main content area is titled 'Creating the Role Hierarchy' and displays a tree view of the organization's role hierarchy. The hierarchy starts with 'Sri Krishna Adithya College of Arts and Science' and branches into roles like CEO, CFO, COO, Gold Smith, Worker, SVP, Customer Service & Support, and Customer Support, International. Each role has an 'Add Role' button and links for 'Edit', 'Del', and 'Assign'.

The screenshot shows the Salesforce Setup interface with the 'Edit Field Dependency' page selected. The left sidebar contains a search bar with 'app manager' and a navigation menu with 'Apps', 'App Manager', and 'External Client Apps'. The main content area is titled 'Edit Field Dependency' and displays a table with columns for 'Priority' and 'Expected Days Of Return'. The table shows a dependency where 'Expected Days Of Return' is dependent on 'Priority'. The table has four columns: 'Low', 'Medium', 'High', and 'Critical'. The 'Expected Days Of Return' column shows values like '1-3 Days', '4-5 Days', '6-7 Days', and '8-10 Days'. The table is filtered to show 'Expected Days Of Return' values. The table is titled 'Showing Columns: 1 - 4 (of 4) < Previous | Next > View All > Go to'. The table is titled 'Showing Columns: 1 - 4 (of 4) < Previous | Next > View All > Go to'.

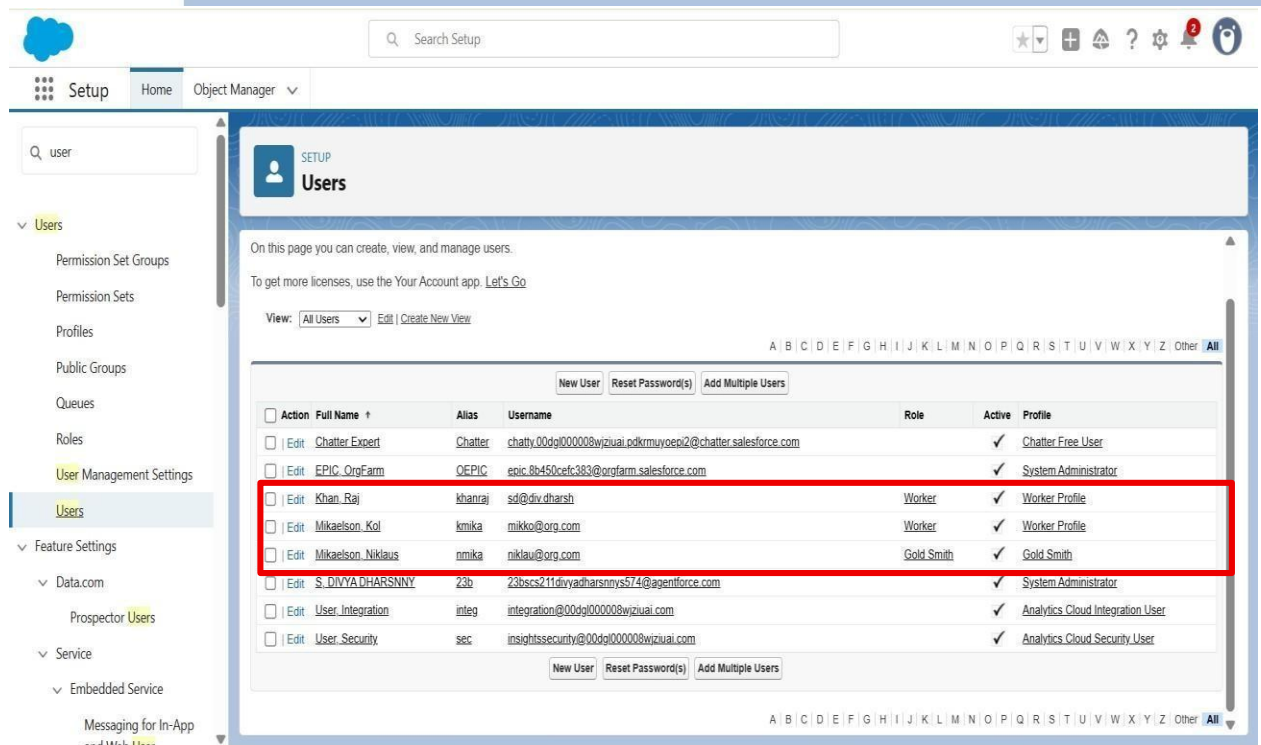
Priority	Low	Medium	High	Critical
Expected Days Of Return:	1-3 Days	1-3 Days	1-3 Days	1-3 Days
	4-5 Days	4-5 Days	4-5 Days	4-5 Days
	6-7 Days	6-7 Days	6-7 Days	6-7 Days
	8-10 Days	8-10 Days	8-10 Days	8-10 Days

- Creating users as Niklaus Mikaelson, Kol Mikaelson and other profiles.



The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar contains a search bar with 'profile' and a navigation menu with 'Users' and 'Profiles' (highlighted). The main content area is titled 'Profiles' and includes a 'New Profile' button and a table of existing profiles.

Action	Profile Name	User License	Custom
Edit Clone	Work.com Only User	Work.com Only	<input type="checkbox"/>
Edit Delete ...	Worker Profile	Salesforce Platform	<input checked="" type="checkbox"/>



The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar contains a search bar with 'user' and a navigation menu with 'Users' (highlighted) and 'User Management Settings'. The main content area is titled 'Users' and includes a table of existing users.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00dgl000008wizuai.pdkrmuyoepl2@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	EPIC OrgFarm	OEPIG	epic.8b450cefc383@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
Edit	Khan Raj	khanraj	sd@div.dharsh	Worker	<input checked="" type="checkbox"/>	Worker Profile
Edit	Mikaelson_Kol	kmika	mikko@org.com	Worker	<input checked="" type="checkbox"/>	Worker Profile
Edit	Mikaelson_Niklaus	nmika	niklau@org.com	Gold Smith	<input checked="" type="checkbox"/>	Gold Smith
Edit	S. DIVYADHARSNNY	23b	23bscs211divyadharsnmys74@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
Edit	User_Integration	integ	integration@00dgl000008wizuai.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00dgl000008wizuai.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Creating Page Layout for Gold and Silver.

Cloud logo | Search Setup | 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 | Restriction Rules | Scoping Rules | Object Access | Triggers | Flow Triggers | Validation Rules | Conditional Field Formatting

Page Layouts
3 Items, Sorted by Page Layout Name

Quick Find | New | Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Item Layout	Harish A, 9/12/2025, 1:23 AM	Mohith K, 9/13/2025, 7:43 AM
Page Layout for Gold	Harish A, 9/13/2025, 11:04 AM	Mohith K, 9/13/2025, 11:36 AM
Page Layout for Silver	Harish A, 9/13/2025, 11:30 AM	Mohith K, 9/13/2025, 11:35 AM

- Creating a record type as Gold and Silver.

Cloud logo | Search Setup | Setup | Home | Object Manager

SETUP > OBJECT MANAGER

Item

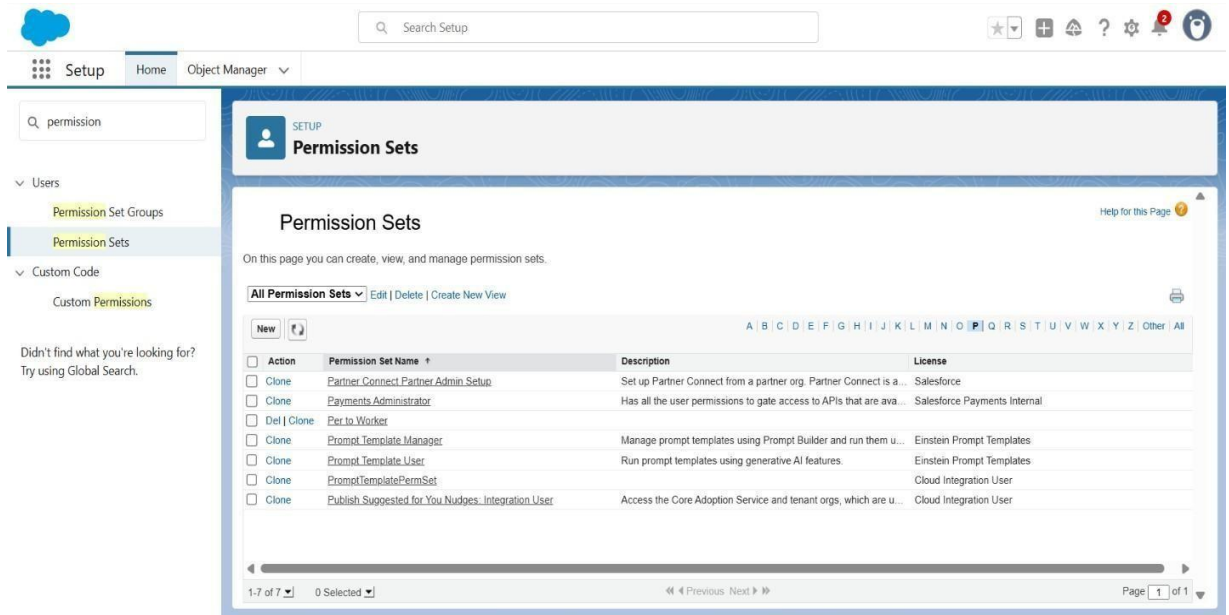
Details | Fields & Relationships | Page Layouts | Lightning Record Pages | Buttons, Links, and Actions | Compact Layouts | Field Sets | Object Limits | **Record Types** | Related Lookup Filters | Restriction Rules | Scoping Rules | Object Access | Triggers | Flow Triggers | Validation Rules | Conditional Field Formatting

Record Types
2 Items, Sorted by Record Type Label

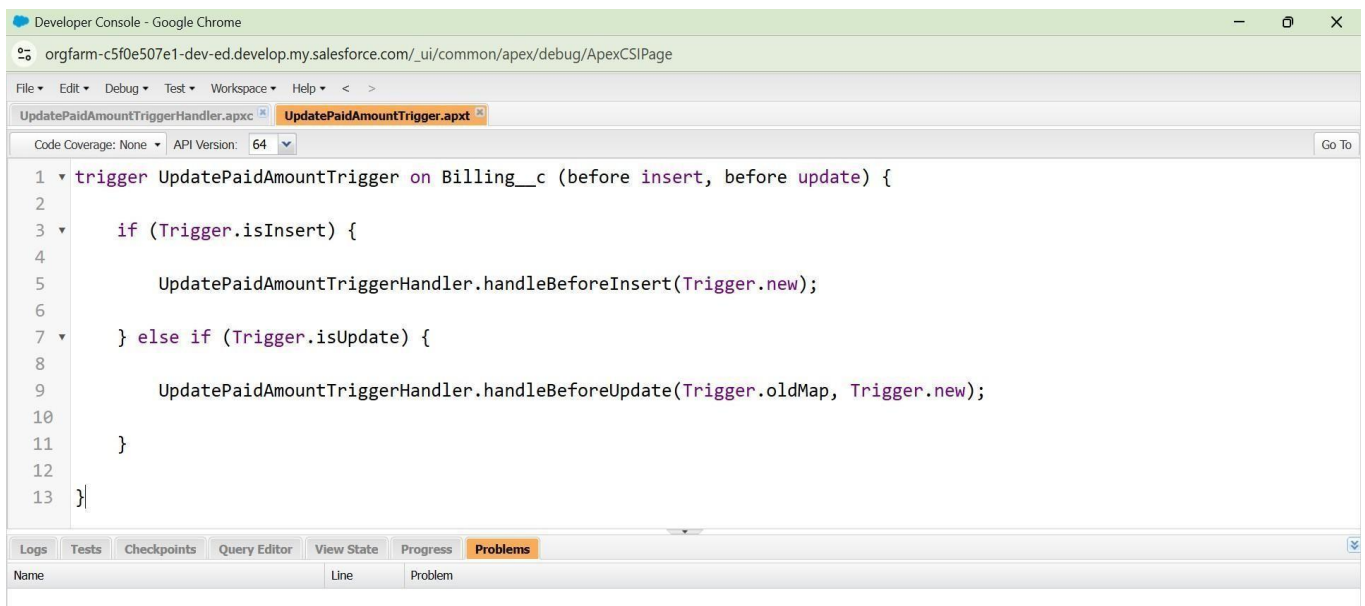
Quick Find | New | Page Layout

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold item information	✓	Mohith k, 9/13/2025, 11:58 AM
Silver	Silver item information	✓	Mohith k, 9/13/2025, 12:01 PM

- Creating permission set as Per to Worker.



- Creating a trigger and trigger handler class.



- Creating, Viewing and Deleting records for Jewel Customer, Price, Item, Customer Order and Billing.

Welcome to Salesforce: Reset y x - Student x Price Report | Salesforce x +

orgfarm-24cc71ce16-dev-ed.develop.lightning.force.com/lightning/r/Report/00OgK0000051Y4nUAE/view?queryScope=userFolders

Search...

Jewellery Inventory ... Jewel Customers Items Customer Orders Prices Billings Reports Dashboards

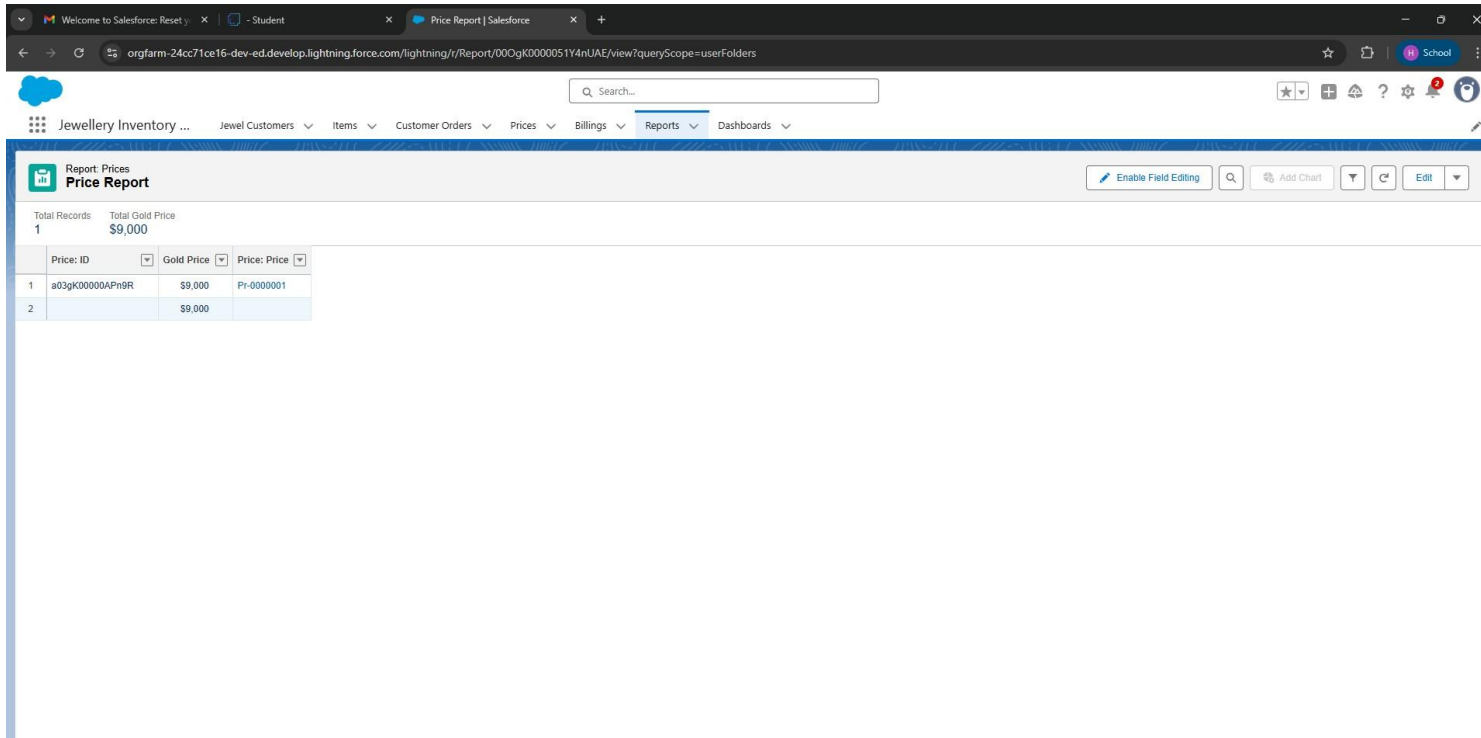
Report: Prices
Price Report

Enable Field Editing Q Add Chart T C Edit

Total Records: 1
Total Gold Price: \$9,000

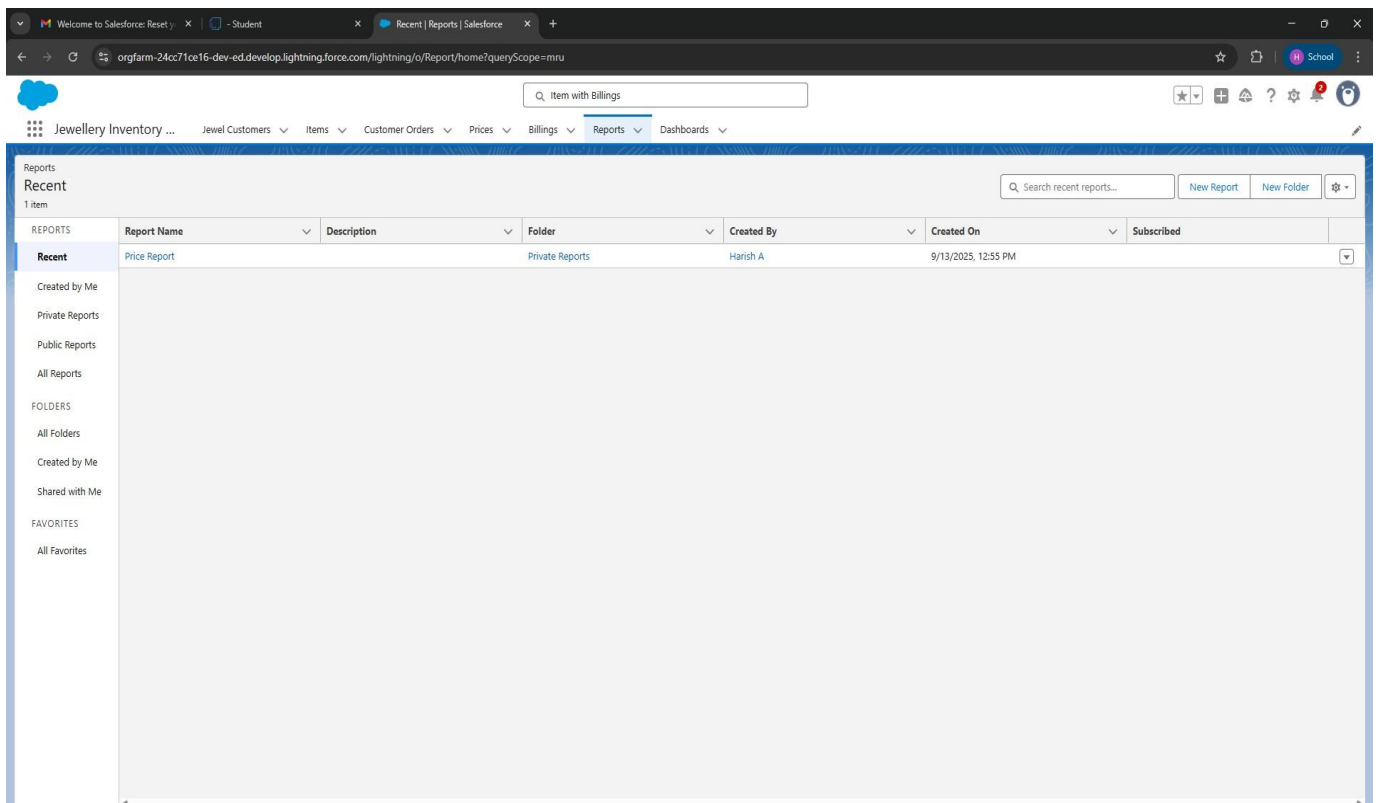
	Price: ID	Gold Price	Price: Price
1	a03gK00000APn9R	\$9,000	Pr-00000001
2		\$9,000	

□ Creating Reports.



This screenshot shows a Salesforce Price Report. The browser address bar indicates the URL: `orgfarm-24cc71ce16-dev-ed.develop.lightning.force.com/lightning/r/Report/000gK0000051Y4nJAE/view?queryScope=userFolders`. The report is titled "Report: Prices" and "Price Report". It shows a summary of 1 total record with a total gold price of \$9,000. The report table contains the following data:

	Price: ID	Gold Price	Price: Price
1	a03gK00000APn9R	\$9,000	Pr-00000001
2		\$9,000	



This screenshot shows the Salesforce Reports Home page. The browser address bar indicates the URL: `orgfarm-24cc71ce16-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mrU`. The page displays a list of recent reports. The table below shows the details of the most recent report:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Price Report		Private Reports	Harish A	9/13/2023, 12:55 PM	

The left sidebar provides navigation options for reports and folders:

- REPORTS
 - Recent
 - Created by Me
 - Private Reports
 - Public Reports
 - All Reports
- FOLDERS
 - All Folders
 - Created by Me
 - Shared with Me
- FAVORITES
 - All Favorites

- Creating Dashboard.

Welcome to Salesforce: Reset y x - Student x Recent | Dashboards | Salesforce x +

orgfam-24cc71ce16-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mrui

Search...

Star

Grid

Refresh

Help

Notifications

Profile

Jewellery Inventory ...

Jewel Customers

Items

Customer Orders

Prices

Billings

Reports

Dashboards

Dashboards

Recent

1 item

Q Search recent dashboards...

New Dashboard

New Folder

Settings

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	dashboard 1		Private Dashboards	Harish A	9/13/2025, 1:03 PM	

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

□ Creating a flow.

Flow Builder: Billing Alert Flow - V1

Errors and Warnings

Errors (1) Warnings (0)

You can't activate this automation until you resolve an error.

notice

- Provide at least one email recipient.

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

Last saved on 9/14/2025, 01:57 AM

Inactive Run Debug View Tests Save As New Version Save Activate

Setup

Home Object Manager

flows

Process Automation

Flows

Identity

Login Flows

Didn't find what you're looking for? Try using Global Search.

SETUP

Flows

Flow Trigger Explorer New Flow

Flow Definitions

All Flows

61 Items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago

Flow Label ↑	Process Type	Active	Template	Package State	Package Name	Last Modified ...	Last Modified Date
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Approvals Workflow: Evaluate Approval Requests	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Approvals Workflow: Process Approval Submission	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Authentication Provider User Registration	Identity User Registration Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Billing Alert Flow	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged	Harish A	9/13/2025, 1:27 PM	
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Chats Routed to Agents and Queues	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Chats Routed to Agents with the Right Skills	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Check Flow API Name	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Check Service Plan Eligibility	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Close Change Request & Related Issues	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS: Check Whether Any Step is Completed	Evaluation Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS: Notify Content Author	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS: Review Content	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS: Submit Content for Review	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS: Withdraw Review Request	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

ADVANTAGES & DISADVANTAGES

ADVANTAGES

- Provides a centralized platform to manage customers, sales, and inventory efficiently.
- Improves customer satisfaction through personalized offers, reminders, and better engagement.
- Reduces manual work with automated billing, payments, and order tracking.
- Enhances decision-making using reports and analytics for sales and inventory.
- Ensures role-based access, improving security and workflow management.

DISADVANTAGES

- Initial setup and training may be time-consuming for traditional jewelers.
- Requires internet connectivity for real-time updates and cloud integration.
- Development and maintenance can involve high costs for small businesses.
- Possible data security risks if not managed with proper encryption and backups.
- Dependence on technology may affect operations during system downtime.

CONCLUSION

The CRM Application for Jewel Management provides an effective solution to modernize jewelry business operations by integrating customer relationship management with sales and inventory control. It helps jewelers streamline their processes, improve customer engagement, and make better business decisions through analytics. While it may require proper training, investment, and maintenance, the long-term benefits such as improved efficiency, higher customer satisfaction, and business growth outweigh the challenges. Overall, this project bridges the gap between traditional jewelry practices and digital transformation, making jewel management more reliable and customer-centric.

APPENDIX

Source Code:

Provided In Trigger Handler Class

```
public class UpdatePaidAmountTriggerHandler { public static void  
  
handleBeforeInsert(List<Billing_c> newBillings) { for (Billing_c billing :  
  
newBillings) { billing.Paid_Amount_c = billing.Paying_Amount ____c;  
  
        }  
  
    }  
  
  
  
  
    public static void handleBeforeUpdate(Map<Id,  
  
Billing ____c> oldBillingsMap, List<Billing____c> updatedBillings)  
  
{ for (Billing____c billing : updatedBillings) {  
  
        Billing_c oldBilling = oldBillingsMap.get(billing.Id);  
  
        Decimal oldPaidAmount = oldBilling.Paid_Amount ____c;  
  
        billing.Paid_Amount ____ c = oldPaidAmount +  
  
        billing.Paying_Amount_c;  
  
        }  
    }  
  
}
```

The Trigger :

trigger UpdatePaidAmountTrigger on Billing c (before insert, before update) {

if (Trigger.isInsert) {

UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);

} else if (Trigger.isUpdate) {

UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap, Trigger.new);

}

}