

CRM Application for Jewel Management

COLLEGE : EINSTEIN COLLEGE OF ENGINEERING

TEAM ID : NM2025TMID05407

TEAM SIZE : 4

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1. INTRODUCTION

1.1 Project Overview:

This project focuses on building a Salesforce-based CRM solution tailored for jewellery shop operations. It helps manage day-to-day activities such as stock monitoring, price adjustments, customer handling, and billing. Using the Salesforce Lightning Platform, I created custom objects, automated workflows with Flows, and designed reports and dashboards to provide clear insights into sales, inventory movement, and customer trends..

1.2 Purpose:

The goal of this project is to transform traditional manual jewellery shop operations into a fully automated, cloud-driven Salesforce CRM system. It supports real-time inventory updates, flexible pricing management, customer billing, and order tracking within a unified platform. This solution improves customer experience, minimizes operational errors, and provides better insights for data-driven business decisions.

The purpose of this project is to design and implement a Salesforce-based CRM solution specifically for jewel businesses to:

- Centralize customer information and communication.
- Track and manage jewellery inventory (gold and silver).
- Enable personalized marketing and offers.
- Facilitate efficient order processing and billing.
- Improve customer retention through engagement automation.
- Generate detailed reports on sales, trends, and staff performance.

2. IDEATION PHASE

2.1 Problem Statement:

Traditional jewellery stores often rely on manual methods for stock management, pricing, and billing, which leads to inconsistent records, limited customer tracking, and slow decision-making. Without a unified system, customer interactions, sales history, and special order details remain scattered, creating operational gaps and reducing service quality.

Many small and medium jewellery retailers struggle to maintain accurate inventory levels, manage customer relationships, and handle customized orders efficiently. Existing general-purpose software fails to address industry-specific requirements such as purity-based pricing, real-time stock updates, and detailed customer profiling, resulting in errors and a less satisfying customer experience.

2.2 Empathy Map Canvas:

Think & Feel

- “Are we missing out on leads because we’re not following up?”
- “I need to know who our high-value customers are.”

Hear

- “The customer wasn’t happy with the delay in their custom order.”
- “Can we send reminders for anniversaries and birthdays?”

See

- Registers with scribbled orders.
- Multiple Excel sheets for billing and inventory.

Say & Do

- “Call them about the pendant order tomorrow.”
- “Print out last year’s top customers list.”

Pain

- Losing customers due to lack of follow-up.
- No real-time inventory tracking.

Gain

- Higher customer satisfaction.
- More repeat purchases via automation.

2.3 Brainstorming:

The brainstorming stage involved gathering inputs from various stakeholders—such as jewellery shop owners, sales staff, developers, and regular users—to identify key features and improvements needed in the CRM system. This collaborative discussion helped uncover real operational challenges in the jewellery business and guided how Salesforce's cloud capabilities could be leveraged to simplify and optimize those processes..

Ideas collected during brainstorming:

- Use of custom objects for Items, Billing, Orders, and Customers.
- Automate stock management with flows.
- Dashboard for daily performance insights.
- Notifications for low inventory.
- Implement record-triggered and scheduled flows.
- Introduce validation rules to prevent data inconsistencies.
- Plan separate dashboards for different roles (sales, inventory, admin).

3. Requirement Analysis:

3.1 Customer Journey Map:

The customer journey map illustrates the complete path a customer takes—from the initial interaction with the store to post-purchase follow-ups. Mapping these stages helps pinpoint areas where the CRM can introduce automation, remove friction, and improve the overall customer experience.

Awareness Stage

- Customer browses website or social media.
- CRM captures leads using Web-to-Lead forms.

Consideration Stage

- Customer visits the store or requests a catalog.

- Salesforce auto-assigns a sales representative.
- Email/SMS with product recommendations is triggered.

Purchase Stage

- Customer places an order (in-store or online).
- CRM logs order and creates a sales opportunity.
- Invoice is generated using built-in templates.

Delivery Stage

- Customer receives order.
- CRM sends order tracking notifications and confirmations.

Post-Purchase Stage

- Customer receives feedback form.
-
- Loyalty points are updated.
- Follow-up reminders for anniversaries, birthdays, etc.

3.2 Solution Requirements:

This phase specifies the system's functional requirements—what the CRM should achieve—as well as the non-functional requirements, which describe the expected performance and quality standards. Key

needs include:

- Real-time tracking of jewellery inventory
- Flexible and automated price management
- Billing with automatic tax computation
- Interactive dashboards and detailed reporting
- Strong data security with controlled user access
- Integration with communication channels like email and SMS
- Clear record ownership for auditing and traceability

3.3 Data Flow Diagrams:

DFD illustrates how data moves between the system's components. This helps developers visualize dependencies and database interaction points.

Main Entities & Data Flow Points:

1. Customer submits a product inquiry.
2. Data flows to CRM Interface (Form or App).
3. CRM creates or updates Customer Object.
4. CRM logs sale and updates Sales Record.
5. Inventory count is adjusted in the Inventory Object.
6. Reports are updated to reflect real-time sales and stock.

3.4 Technology Stack:

Defines the tools and platforms used to develop, deploy, and manage the CRM system in Salesforce.

- Platform: Salesforce Lightning Experience.
- Logic: Apex Triggers, Validation Rules, Flow Builder.

- UI: Lightning Tabs, Pages, Reports, Dashboards.
- Database: Salesforce Standard & Custom Objects.
- Integration: Email Templates, Scheduled Flows, Approval Processes.

4. PROJECT DESIGN

4.1 Problem Solution Fit:

Problem: Manual processes and lack of centralized tracking

Solution: Salesforce CRM system automating every major jewelry workflow

4.2 Proposed Solution:

Five major custom objects: Item__c, Price__c, Jewel_Customer__c, Customer_Order__c, Billing__c

- Lightning app with navigation tabs
- Automated flows for inventory, billing, and notifications • Dashboards visualizing sales, stock, and revenue performance

4.3 : Solution Architecture:

Objects and Relationships:

- Jewel_Customer__c ↔ Customer_Order__c ↔ Billing__c ↔ Item__c ↔ Price__c
- Lookup and Master-Detail fields used to link records
- Formula fields for auto-calculations (e.g., total billing amount)
- Validation rules for quantity and price limits
- Record Types to distinguish Gold, Silver, and Diamond workflows

5. PROJECT PLANNING AND SCHEDULING

5.1 Project Planning:

The planning and scheduling phase focuses on outlining the project timeline, scope, team roles, required tools, and key milestones. This stage ensures that development progresses in a structured and scalable way, keeping the project aligned with business objectives and enabling the CRM solution to be delivered efficiently and in well-defined phases.

- Week 1: Requirement gathering, Usecase and ER Diagrams
- Week 2: Custom object creation, Page Layouts and Tab Setup
- Week 3: Flows and Automation Setup, Validation Rules
- Week 4: Reports and Dashboards, Testing and Review
- Week 5: Final Deployment, Documentation and User Training

6. PROJECT DEVELOPMENT PHASE - SALESFORCE GUIDED PROJECT

The development phase forms the foundation of the CRM system, where essential features were built using Salesforce's declarative components along with programmatic enhancements when needed. Work was carried out in iterative Agile sprints, allowing continuous refinement and faster delivery. This stage was divided into multiple development activities to ensure structured and efficient implementation.

6.1 Developer Environment Setup:

- Create Salesforce Developer Org via developer.salesforce.com/signup

Fill the required information, verify email, set password, and access Salesforce Setup.



Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

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- ✓ Build AI agents with Agentforce
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and Data Cloud

First name	Last name
<input type="text" value="Bobbadi Harshitha"/>	<input type="text" value="Team"/>
Job title	Work email
<input type="text" value="Salesforce Developer"/>	<input type="text" value="bobbadiharshitha4@"/>
Company	Country/Region
<input type="text" value="Ideal Institute of Tech"/>	<input type="text" value="India"/>

*Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☒ I agree to the Main Service 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.

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Sign Me Up



Ready for a new password?

Reset Password



Change Your Password

Enter a new password for **streetcause178@sb.com**.
Make sure to include at least:

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

* New Password

Good

* Confirm New Password

* Security Question

* Answer

*=required


Change Password

Password was last changed on 6/20/2025, 3:59 AM.








6.2 Custom Object Creation:

We create five main custom objects for Jewel Customer, Item, Customer Order, Price, Billing.

1. Jewel Customer



Search Setup



SetupHomeObject 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

Details

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

EditDelete

2. Item



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

Search Layouts

List View Button Layout

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

3. Customer Order



Q Search Setup



SetupHomeObject 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

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

EditDelete

4. Price



Q 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

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

EditDelete

5. Billing

The screenshot shows the Salesforce Setup interface for the Billing object. The left sidebar contains a navigation menu with 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, and List View Button Layout. The main content area is titled 'Billing' and includes a 'Details' section with the following fields:

Field	Value
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

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

6.3 Creation of Tabs

We create five main custom tabs for Jewel Customer, Item, Customer Order, Price, Billing.

1. Jewel Customer

The screenshot shows the Salesforce Setup interface for the 'Jewel Customers' custom tab. The left sidebar contains a navigation menu with options: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Jewel Customers' and includes a 'Custom Tab Definition Detail' section with the following fields:

Field	Value
Tab Label	Jewel Customers
Object	Jewel Customer
Description	
Created By	Robbadi Harshitha Team 6/22/2025, 8:13 AM
Tab Style	Altplane
Splash Page Custom Link	
Modified By	Robbadi Harshitha Team 6/22/2025, 8:13 AM

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

2. Item

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'tabs' and a 'User Interface' section with 'Rename Tabs and Labels' and 'Tabs' options. The main content area is titled 'SETUP Tabs' and shows 'Custom Object Tab Items'. Below this, it says 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' section includes a table with the following data:

Tab Label	Item	Tab Style
Object	Item	Alarm clock
Description		Splash Page Custom Link
Created By	Robbadi Harshitha Team, 6/22/2025, 8:17 AM	Modified By Robbadi Harshitha Team, 6/22/2025, 8:17 AM

3. Customer Order

The screenshot shows the Salesforce Setup interface for the 'Customer Orders' custom tab. The left sidebar has a search bar with 'tabs' and a 'User Interface' section with 'Rename Tabs and Labels' and 'Tabs' options. The main content area is titled 'SETUP Tabs' and shows 'Custom Object Tab Customer Orders'. Below this, it says 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' section includes a table with the following data:

Tab Label	Customer Orders	Tab Style
Object	Customer Order	Hel
Description		Splash Page Custom Link
Created By	Robbadi Harshitha Team, 6/22/2025, 8:19 AM	Modified By Robbadi Harshitha Team, 6/22/2025, 8:19 AM

4. Price

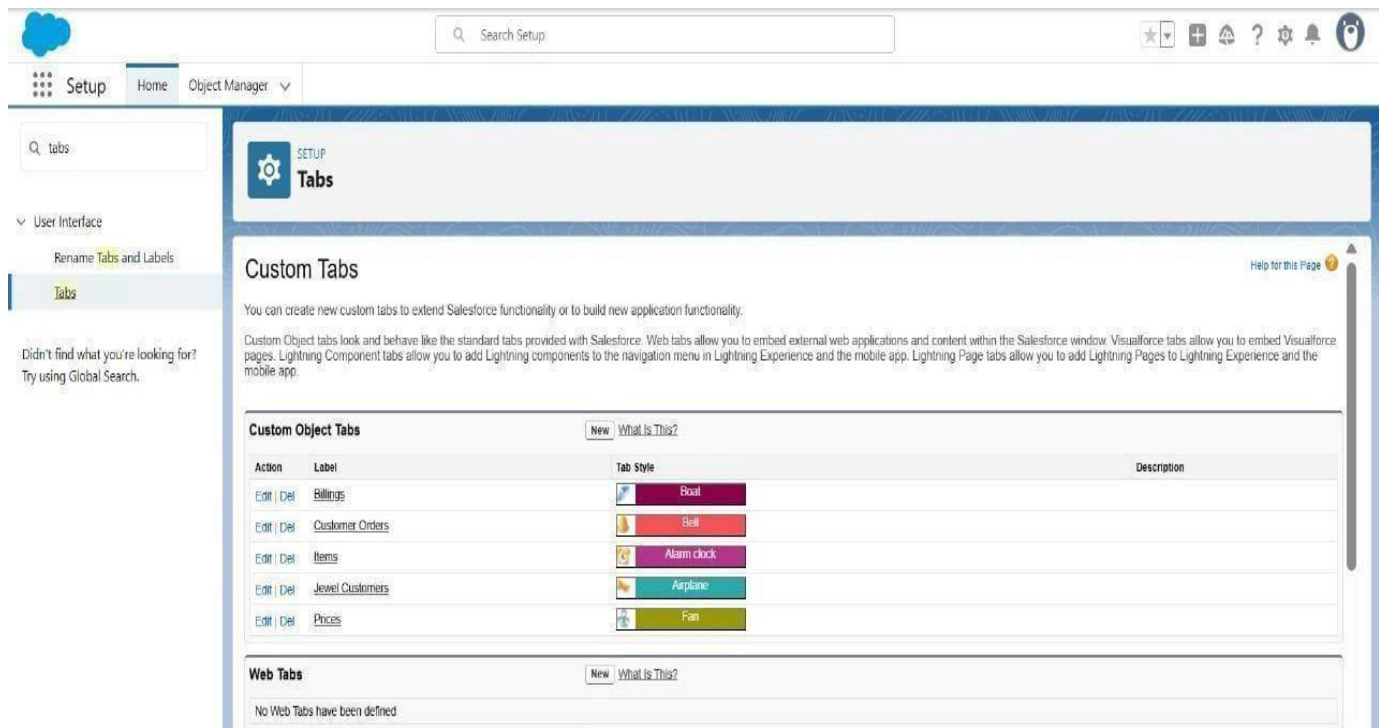
The screenshot displays the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Setup' selected, and 'User Interface' expanded to show 'Rename Tabs and Labels' and 'Tabs'. The main content area is titled 'Custom Object Tab Prices' and includes a 'Help for this Page' link. Below the title, it states: 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' section shows the following information:

Field	Value
Tab Label	Prices
Object	Price
Description	
Created By	Robbadi Harshitha Team 6/22/2025, 8:20 AM
Modified By	Robbadi Harshitha Team 6/22/2025, 8:20 AM

The 'Tab Style' is set to 'Fan'.

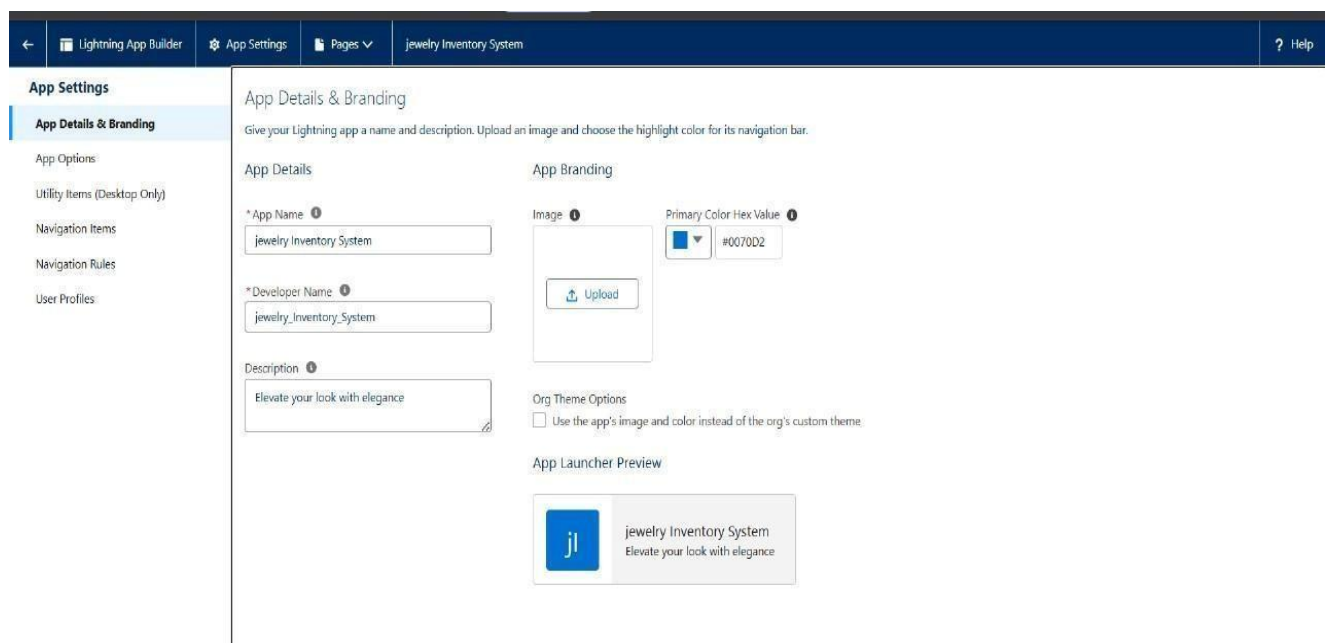
5. Billing

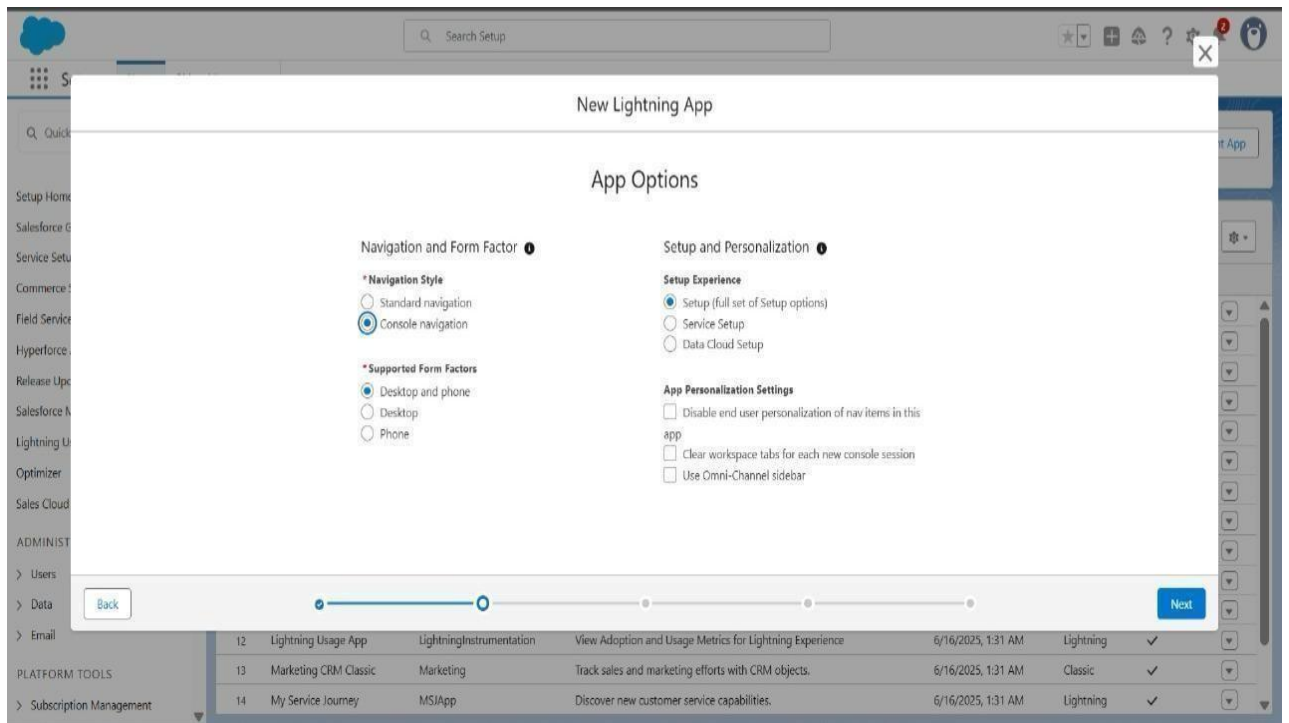
So we get the required all custom tabs as below



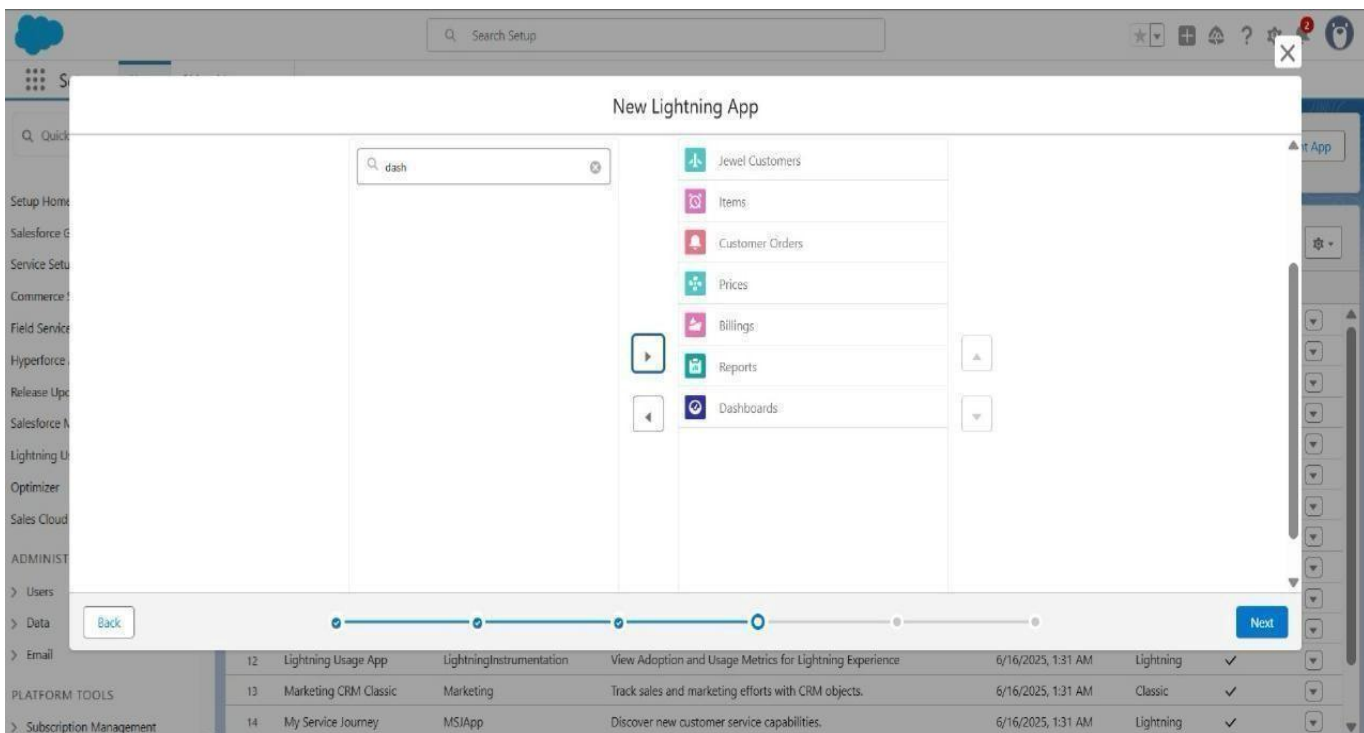
6.4 Creation of Lightning App

App Name: Jewelry Inventory System





Navigation Items



6.5 Creation of Fields

1. Creating lookup relationship

To Create a relationship between Jewel Customer & Customer Order Objects.

The screenshot shows the Salesforce Setup interface for creating a new relationship for the Customer Order object. 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, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled "Customer Order" and "New Relationship". The current step is "Step 3. Enter the label and name for the lookup field". The form includes fields for Field Label (Customer), Field Name (Customer), Description, and Help Text. Below these, there are checkboxes for "Child Relationship Name" (Customer_Orders), "Required" (Always require a value in this field in order to save a record), "What to do if the lookup record is deleted?" (Clear the value of this field. You can't choose this option if you make this field required.), and "Add this field to existing custom report types that contain this entity" (checked).

The screenshot shows the Salesforce Setup interface for creating a new relationship for the Customer Order object. 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, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled "Customer Order" and "New Relationship". The current step is "Step 6. Add custom related lists". The form includes a table with columns for Field Label, Data Type, Field Name, and Description. The table shows a single row with Field Label: Customer, Data Type: Lookup, Field Name: Customer, and Description: . Below the table, there is a section for "Specify the title that the related list will have in all of the layouts associated with the parent" with a field for Related List Label (Customer Orders). There is also a section for "Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout." with a table for "Add Related List" and "Page Layout Name". The table shows a single row with a checked checkbox and Page Layout Name: Jewel Customer Layout. At the bottom, there is a checkbox for "Append related list to users' existing personal customizations" (checked).

2. Creating a Master-Detail Relationship

Creating Master-Detail Relationship between Item & Customer Order Object.

Cloud logo | 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
Restriction Rules
Scoping Rules

Customer Order
New Relationship Help for this Page

Step 5. Add reference field to Page Layouts Step 5 of 6

Field Label	Item
Data Type	Master-Detail
Field Name	Item
Description	

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Customer Order Layout

Previous Next Cancel Previous

Cloud logo | 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
Restriction Rules
Scoping Rules

Customer Order
New Relationship Help for this Page

Step 6. Add custom related lists Step 6 of 6

Field Label	Item
Data Type	Master-Detail
Field Name	Item
Description	

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List	Page Layout Name
<input checked="" type="checkbox"/>	Item Layout

☒ Append related list to users' existing personal customizations

Previous Save & New Save Cancel

3. Creating Text Field in Jewel Customer Object

Setup

Home

Object Manager

Search Setup

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

Jewel Customer

New Custom Field

Help for this Page

Step 2. Enter the details

Step 2 of 4

Previous

Next

Cancel

Field Label

City

Please enter the maximum length for a text field below:

Length

20

Field Name

City

Description

Help Text

Required

☐ Always require a value in this field in order to save a record

Unique

☐ Do not allow duplicate values

☒ Treat "ABC" and "abc" as duplicate values (case insensitive)

☐ Treat "ABC" and "abc" as different values (case sensitive)

External ID

☐ Set this field as the unique record identifier from an external system

Auto add to custom report type

☒ Add this field to existing custom report types that contain this entity

Previous

Next

Cancel

Setup

Home

Object Manager

Search Setup

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

Jewel Customer

New Custom Field

Help for this Page

Step 4. Add to page layouts

Step 4 of 4

Previous

Save & New

Save

Cancel

Field Label

City

Data Type

Text

Field Name

City

Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☒ Add Field

Page Layout Name

Jewel Customer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous

Save & New

Save

Cancel

4. Creating the Phone field in object Jewel Customer

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

Jewel Customer
New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label Phone
Data Type Phone
Field Name Phone
Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☒ Add Field **Page Layout Name**
☒ Jewel Customer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

5. Creating the Email field in object Jewel Customer

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

Jewel Customer
New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label Email
Data Type Email
Field Name Email
Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☒ Add Field **Page Layout Name**
☒ Jewel Customer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

6. Creating the number field in 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
 Scoping Rules

Item
New Custom Field

Help for this Page

Step 4. Add to page layouts Step 4 of 4

Field Label

Purity

Data Type

Number

Field Name

Purity

Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☒ Add Field

☒ Page Layout Name

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous

Save & New

Save

Cancel

7. Creating Picklist Field in 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
 Scoping Rules

Item
New Custom Field

Help for this Page

Step 4. Add to page layouts Step 4 of 4

Field Label

Item Type

Data Type

Picklist

Field Name

Item_Type

Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☒ Add Field

☒ Page Layout Name

When finished, click Save & New to create more custom fields, or click Save if you are done.

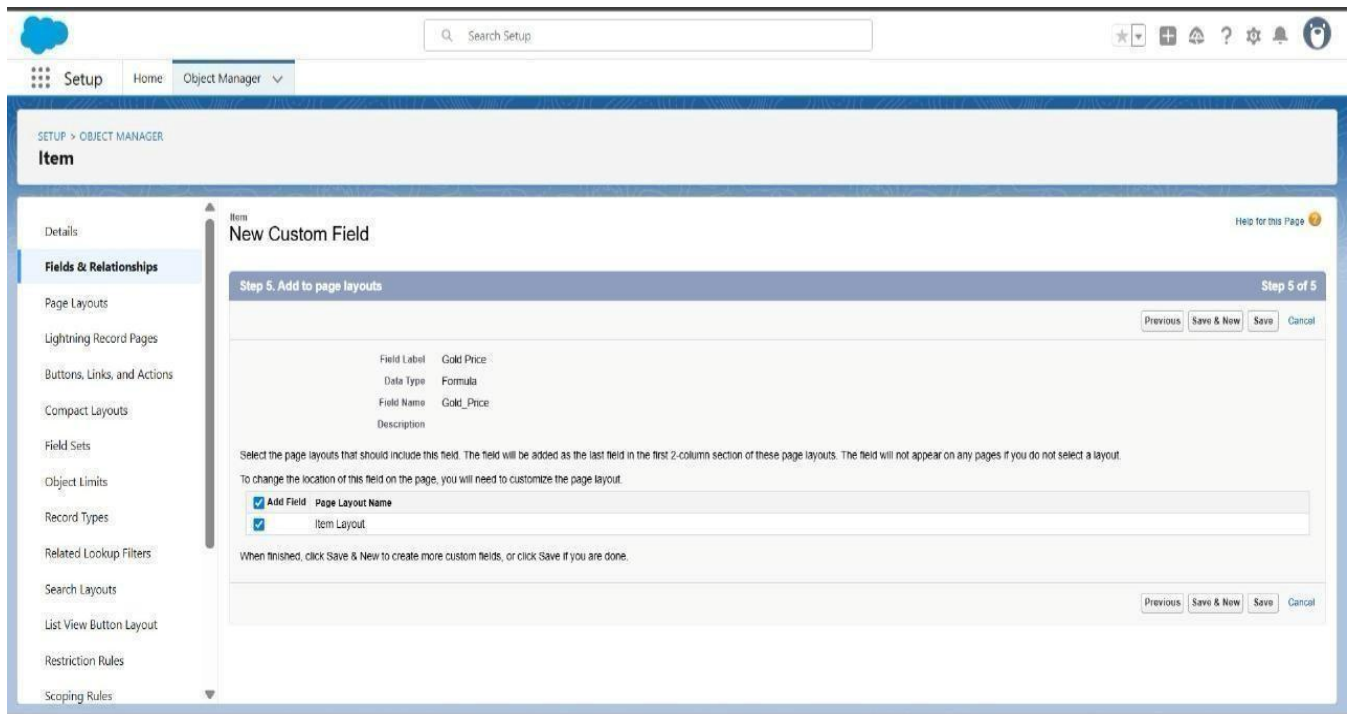
Previous

Save & New

Save

Cancel

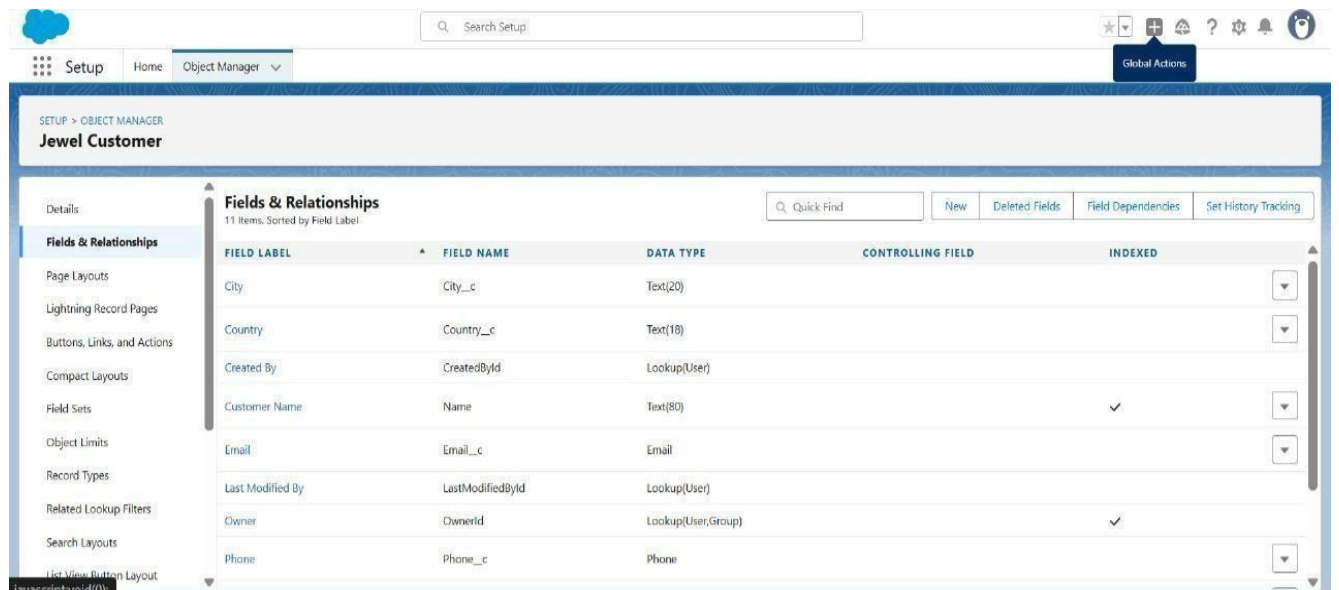
8. Creating Currency Field in Price Object



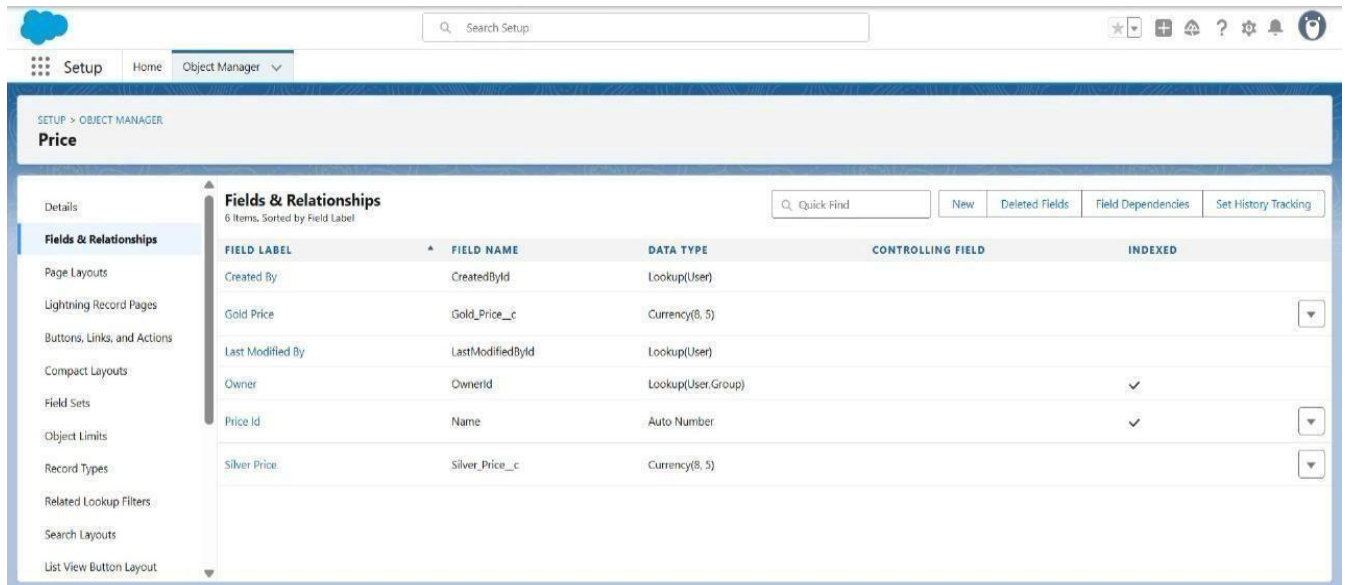
10. Creating Remaining Fields in Objects

Creating remaining fields in the objects

1. Jewel Customer : State, Street, Country, Zip/Postal code



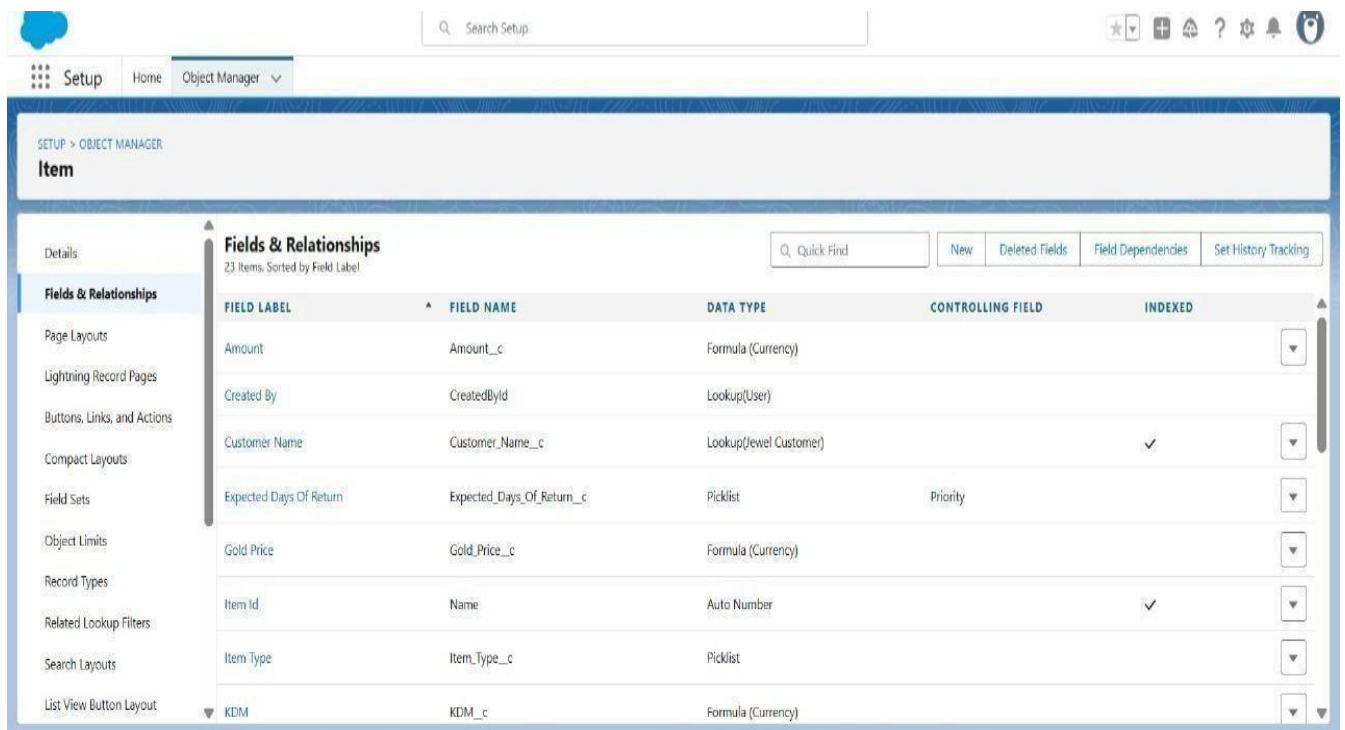
2. Price : Silver Price



The screenshot shows the Salesforce Setup interface for the 'Price' object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Price' and shows 'Fields & Relationships' for 6 items, sorted by Field Label. The table lists the following fields:

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

3. Item : Field Label-Customer Name, Ornament, Weight, Stone Weight, Percentage, Stone/Other Price, Expected Days of Return, Priority, Silver Price, Purity Gold Price, Total weights, Amount, KDM, Making Charges.



The screenshot shows the Salesforce Setup interface for the 'Item' object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Item' and shows 'Fields & Relationships' for 23 items, sorted by Field Label. The table lists the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Customer Name	Customer_Name__c	Lookup(Lead 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)		

4. Customer Order: Order Status

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

Customer Order

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

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

5. Billing: Field Label-Item, Ornament, Stone Weight, Weight, Amount, Gold/Silver Price, KDM Charge, Making Charges, Stone/Other Price, Total Amount.

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

Billing

Details

Fields & Relationships

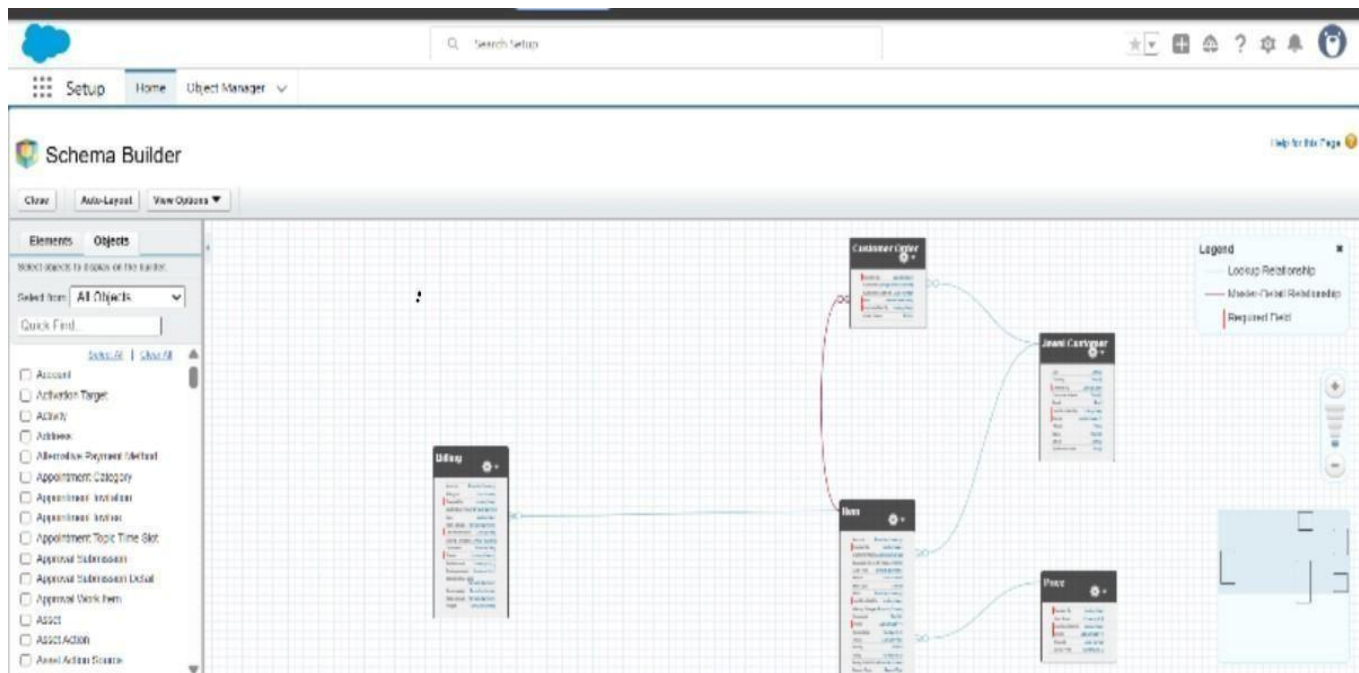
16 Items. Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Billing Id	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Gold/Silver Price	Gold_Silver_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)		

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

11. Creation of Schema Builder



12. Creation of Field Dependencies

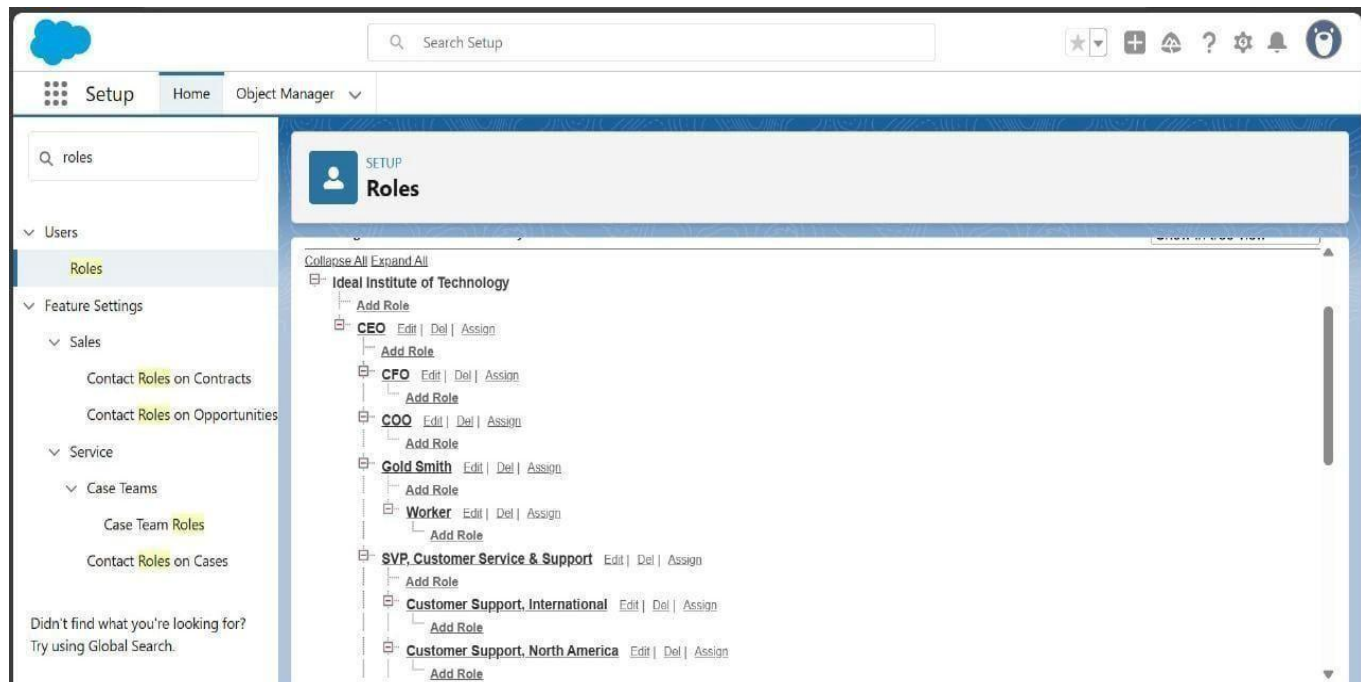
The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Setup icon, a search bar, and various utility icons. The left sidebar shows the Setup menu with options like Home, Object Manager, and a search bar. The main content area is titled 'Jewel Customer Validation Rule' and includes a 'Back to Jewel Customer' link. The 'Validation Rule Detail' section shows the rule name 'ValidationRule_For_JewelCustomerObject', the error condition formula 'OR(ISBLANK(City__c) , ISBLANK(Country__c) ISBLANK(Phone__c) ISBLANK(State__c) ISBLANK(Street__c))', the error message 'Please fill Required fields', and the error location 'Top of Page'. The rule is active and was created by 'Bobbadt Harshitha Team' on 6/23/2025 at 7:00 AM.

6.6 Creation of Profiles

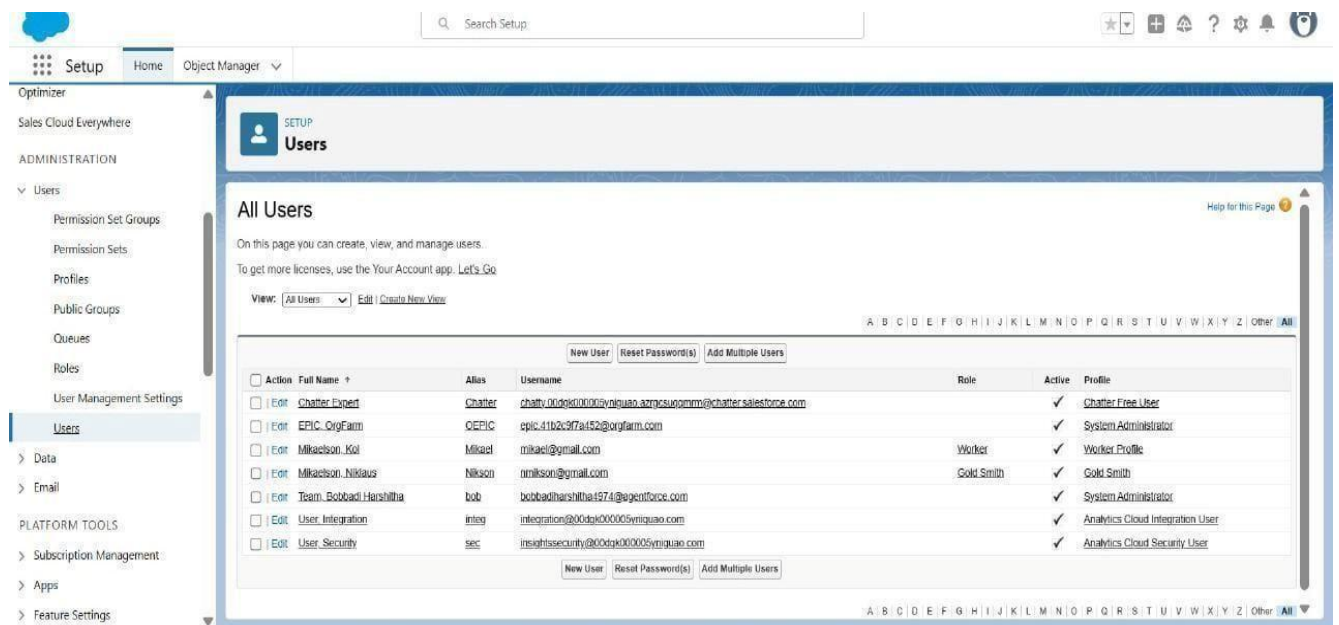
We create the goldsmith profile and the worker profile

The screenshot shows the Salesforce Setup interface for the 'Worker Profile'. The left sidebar shows the Setup menu with options like Home, Object Manager, and a search bar. The main content area is titled 'Worker Profile' and includes a 'Help for this Page' link. The 'Profile Detail' section shows the profile name 'Worker Profile', the user license 'Salesforce Platform', the description 'Custom Profile', and the created by 'Bobbadt Harshitha Team' on 6/23/2025 at 7:31 AM. The 'Page Layouts' section shows the standard object layouts for Global, Email Application, Home Page Layout, and Account, along with the lead layout, location layout, location group layout, and location group assignment layout.

6.7 Creation of Roles




6.8 Creation of Users









6.9 Creation of Page Layouts

We create the page layouts for gold and silver items



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

Search Layouts

List View Button Layout

Page Layout for Gold

Mini Page LayoutMini Console ViewVideo TutorialHelp for this Page

SaveQuick SavePreview As...CancelUndoRedoLayout Properties

Fields

Section

Customer Name

Item Type

Ornament

Priority

Silver Price

Weight

Blank Space

Expected Days Of ...

KDM

Owner

Purity

Stone/Other Price

Amount

Gold Price

Last Modified By

Percentage

Purity Gold Price

Stone Weight

Created By

Item Id

Making Charges

Prices

Record Type

Total Weight

Item Sample

Highlights Panel

Customize the highlights panel for this page layout...

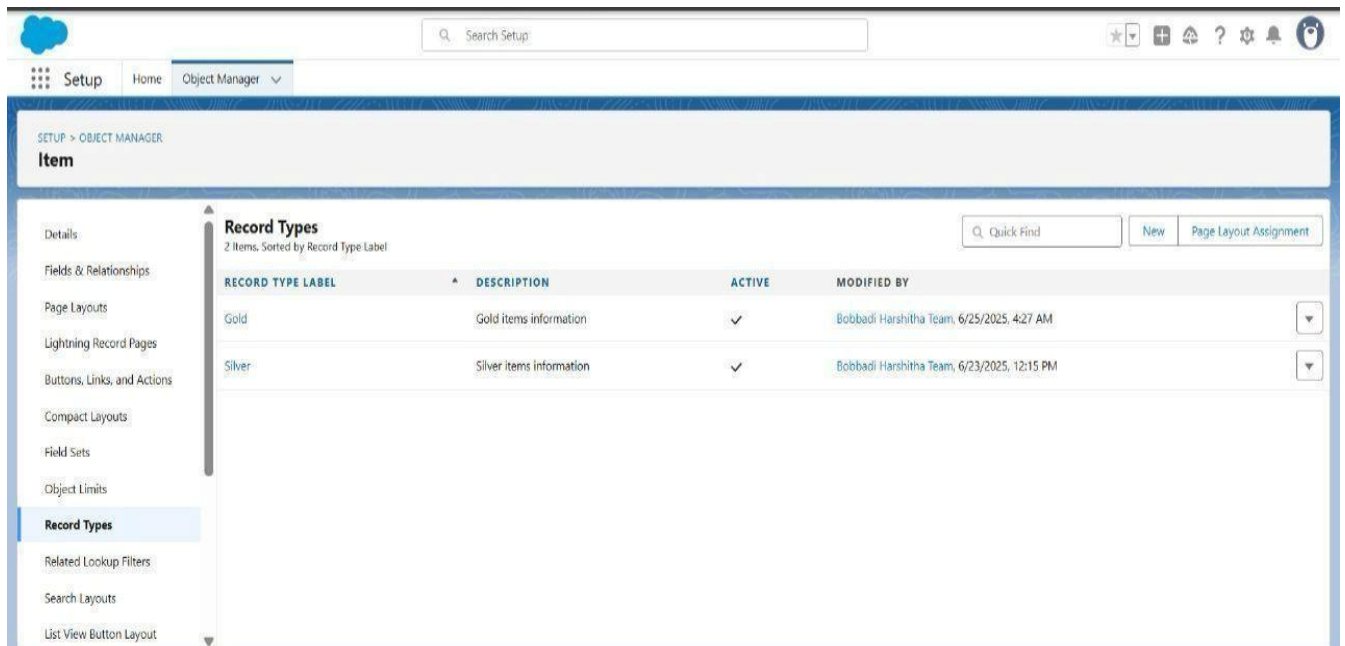
Quick Actions in the Salesforce Classic Publisher

Actions in this section are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning Experience Actions

6.9 Creation of Record Types

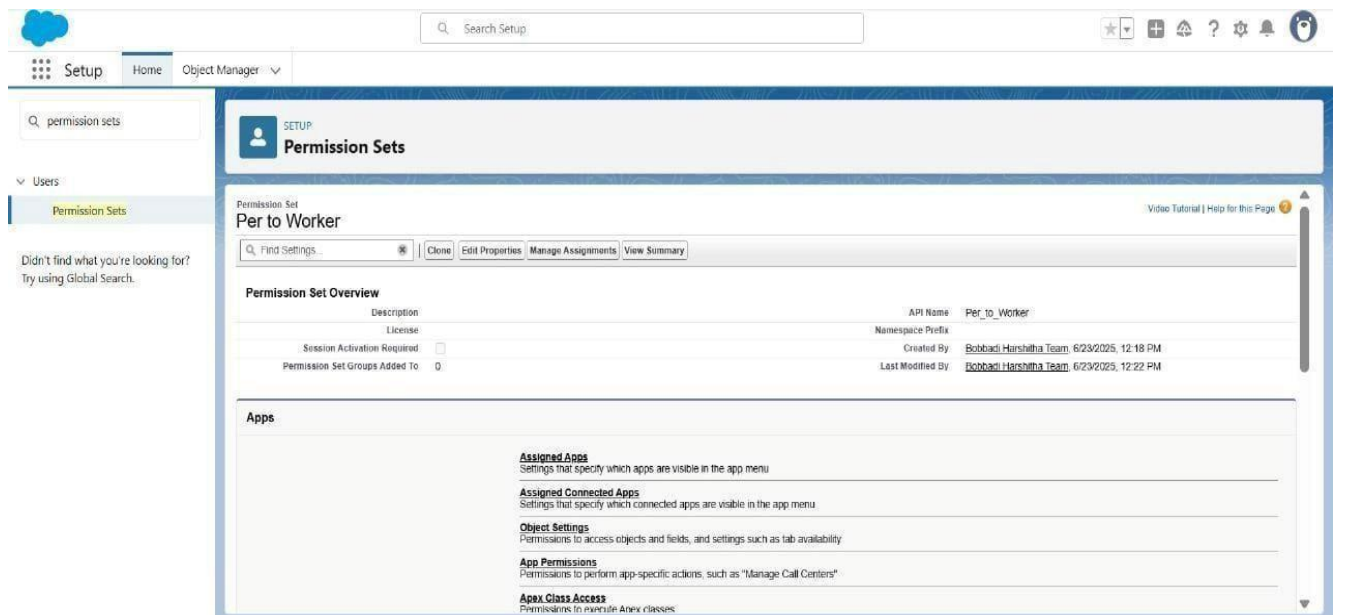
We create the gold and silver records



The screenshot shows the Salesforce Setup interface, specifically the Object Manager for the 'Item' object. The 'Record Types' section is active, displaying a table with 2 items. The table columns are Record Type Label, Description, Active, and Modified By. The 'Gold' record type is active and was modified by Bobbadi Harshitha Team on 6/25/2025 at 4:27 AM. The 'Silver' record type is also active and was modified by Bobbadi Harshitha Team on 6/23/2025 at 12:15 PM. The left sidebar shows the navigation menu with 'Record Types' selected.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	Bobbadi Harshitha Team, 6/25/2025, 4:27 AM
Silver	Silver items information	✓	Bobbadi Harshitha Team, 6/23/2025, 12:15 PM

6.10 Creation of Permission Sets



The screenshot shows the Salesforce Setup interface, specifically the Permission Sets page. The 'Per to Worker' permission set is selected. The 'Permission Set Overview' section shows the API Name as 'Per_to_Worker', Namespace Prefix, Created By (Bobbadi Harshitha Team), and Last Modified By (Bobbadi Harshitha Team). The 'Apps' section lists the assigned apps, including Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, and Apex Class Access.

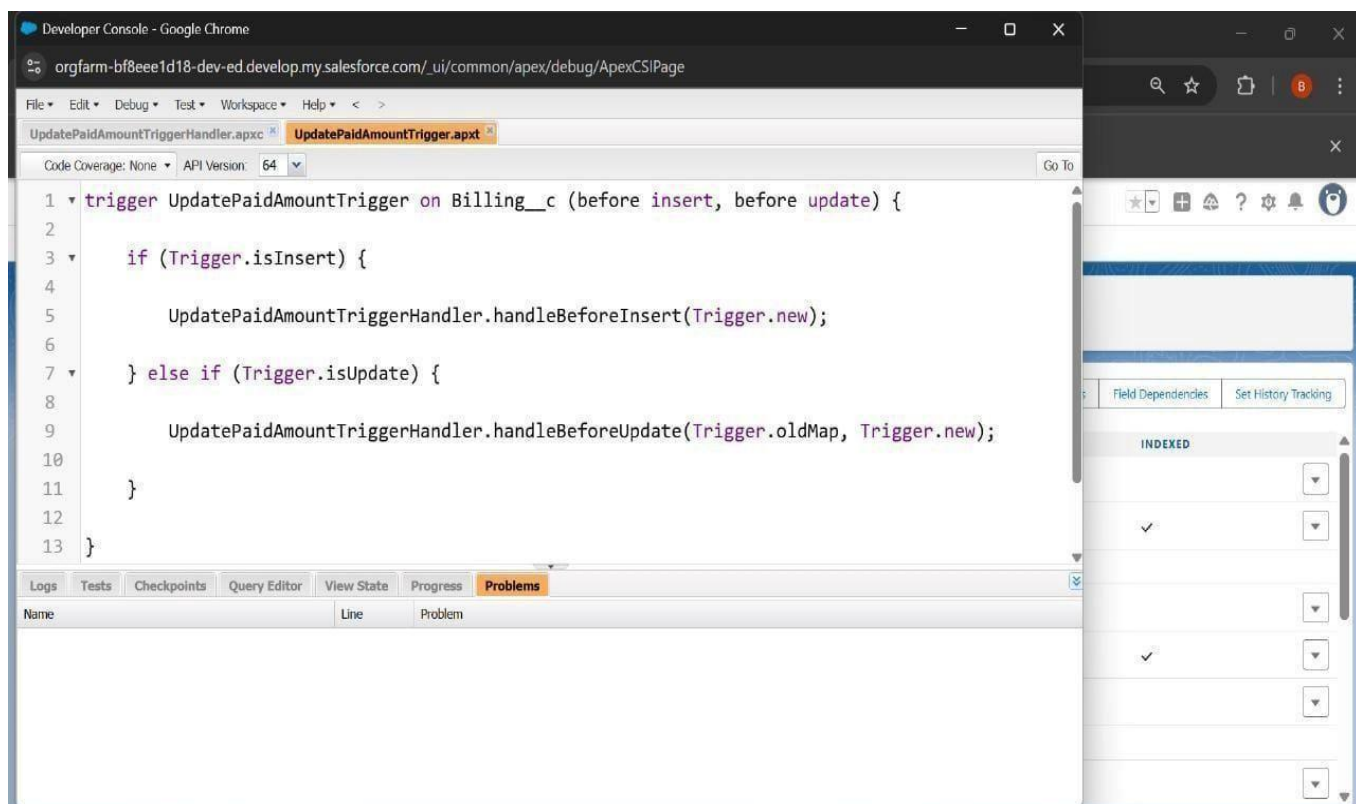
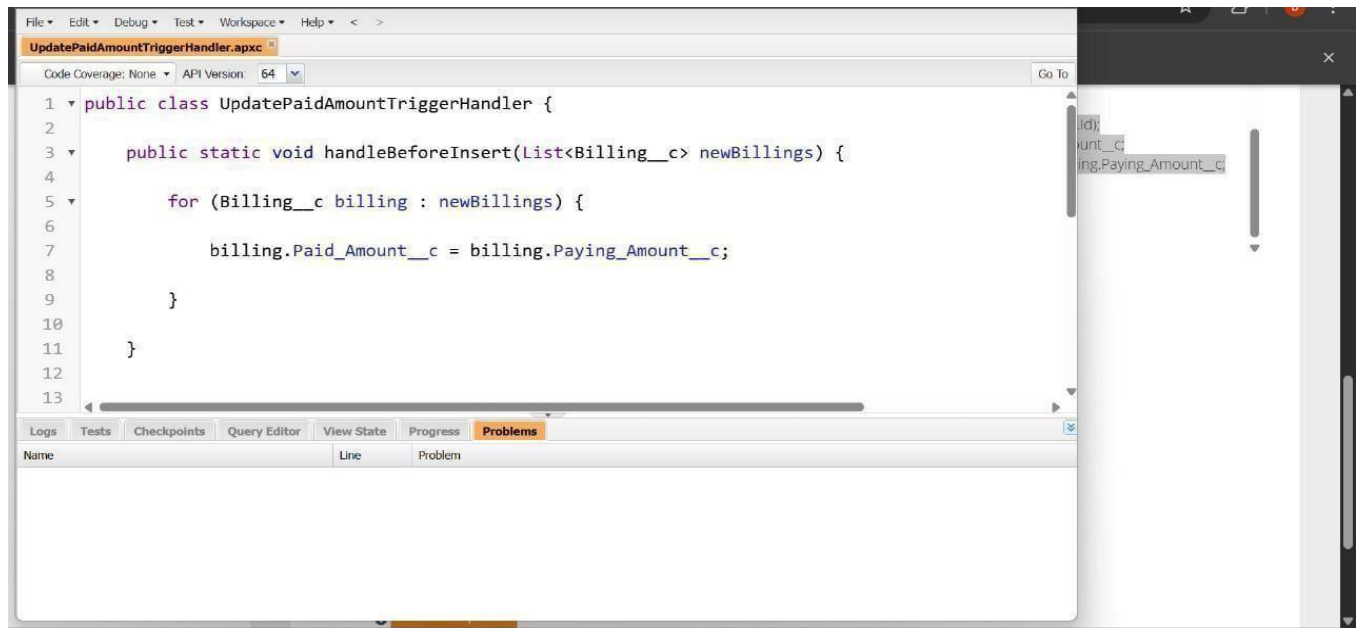
Permission Set Overview

Field	Value
Description	
License	
Session Activation Required	<input type="checkbox"/>
Permission Set Groups Added To	0
API Name	Per_to_Worker
Namespace Prefix	
Created By	Bobbadi Harshitha Team, 6/23/2025, 12:18 PM
Last Modified By	Bobbadi Harshitha Team, 6/23/2025, 12:22 PM

Apps

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes

6.11 Creation of Trigger



6.12 Creation of User Adoption

We create item,price,customer orders,jewel customers and billing

<input type="checkbox"/>	Price Id	
1 <input type="checkbox"/>	Price-10	
2 <input type="checkbox"/>	Price-09	
3 <input type="checkbox"/>	Price-08	
4 <input type="checkbox"/>	Price-07	
5 <input type="checkbox"/>	Price-06	
6 <input type="checkbox"/>	Price-05	
7 <input type="checkbox"/>	Price-04	
8 <input type="checkbox"/>	Price-03	
9 <input type="checkbox"/>	Price-02	
10 <input type="checkbox"/>	Price-01	

<input type="checkbox"/>	Customer Name	
1 <input type="checkbox"/>	Arjun	
2 <input type="checkbox"/>	Joshna	
3 <input type="checkbox"/>	Anand	
4 <input type="checkbox"/>	Krishna	
5 <input type="checkbox"/>	Sita	
6 <input type="checkbox"/>	Nani	
7 <input type="checkbox"/>	Shyamala	
8 <input type="checkbox"/>	Manasa	
9 <input type="checkbox"/>	Ravi	
10 <input type="checkbox"/>	Devi	

6.13 Creation of Reports

jewelry Inventory Sy...

Search...

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👤

Reports

Recent

3 items

Q Search recent reports...

New Report

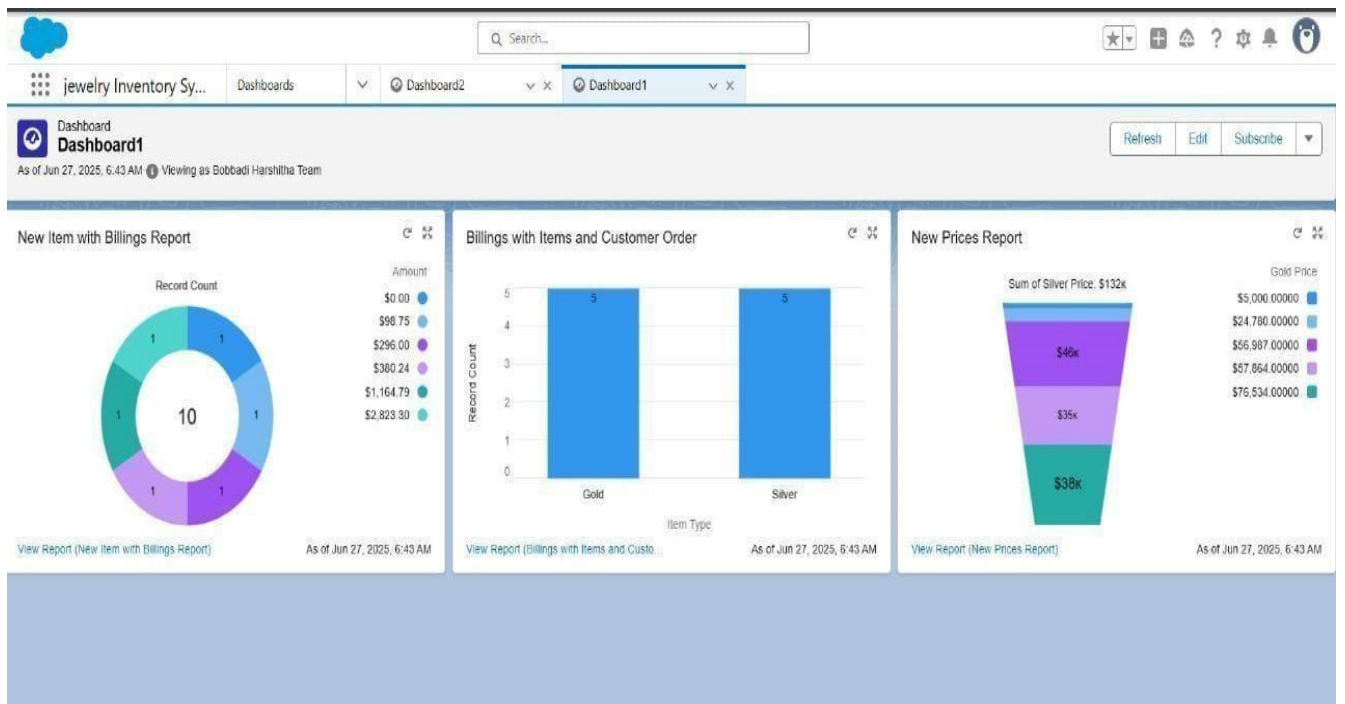
New Folder

⚙️

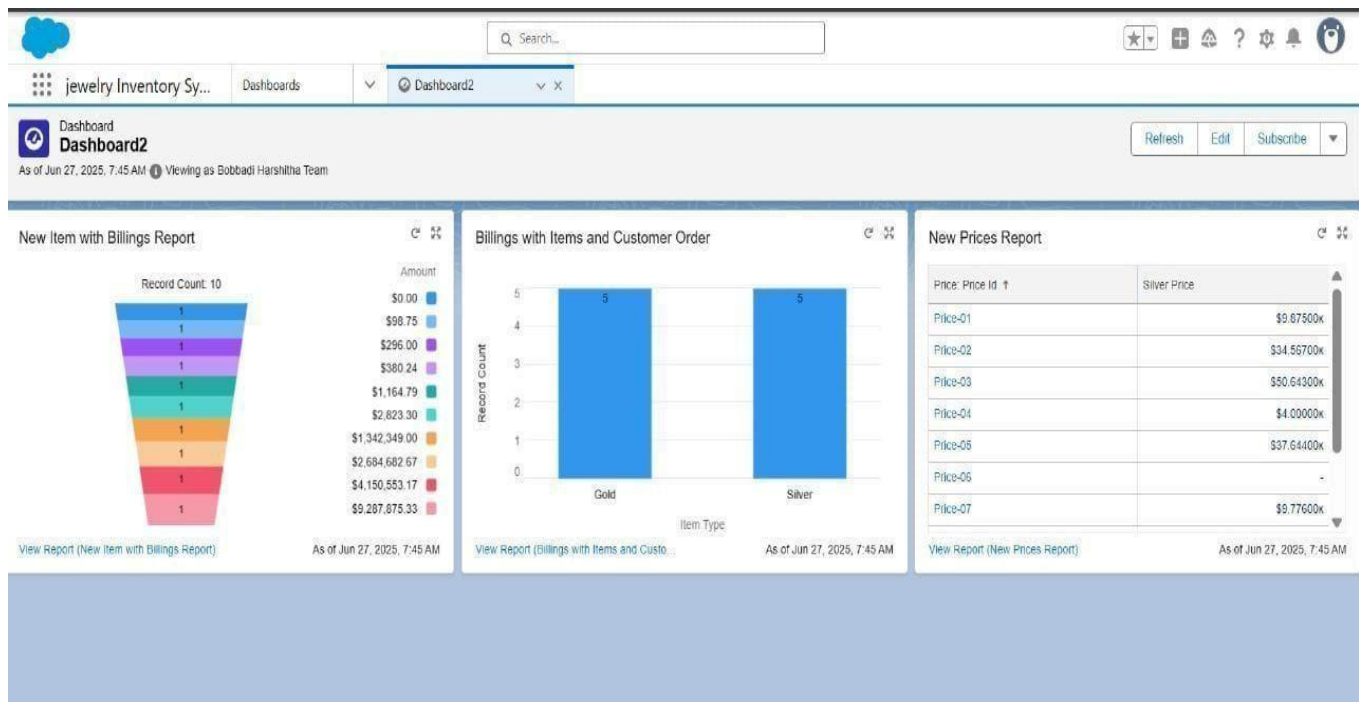
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Billings with Items and Customer Order		Private Reports	Bobbadi Harshitha Team	6/25/2025, 10:44 AM	▼
Created by Me	New Item with Billings Report		Private Reports	Bobbadi Harshitha Team	6/25/2025, 10:43 AM	▼
Private Reports	New Prices Report		Private Reports	Bobbadi Harshitha Team	6/25/2025, 9:56 AM	▼
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

6.14 Creation of Dashboards

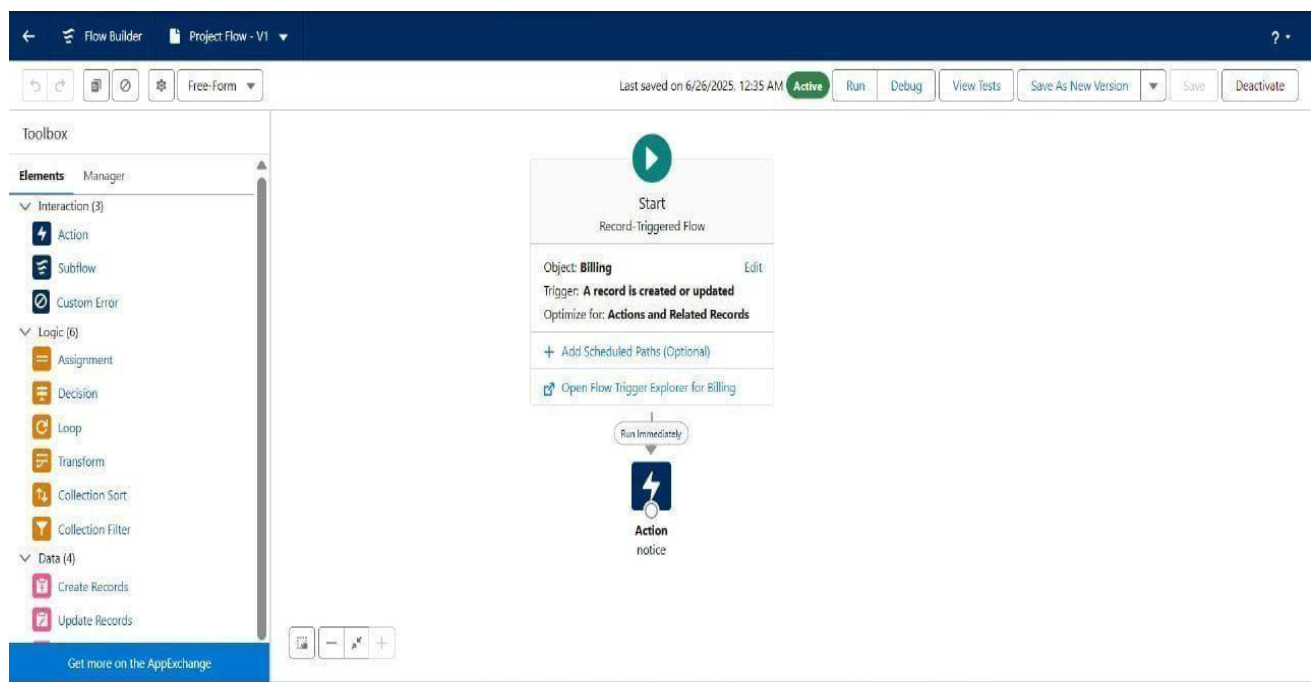
Dashboard 1



Dashboard 2

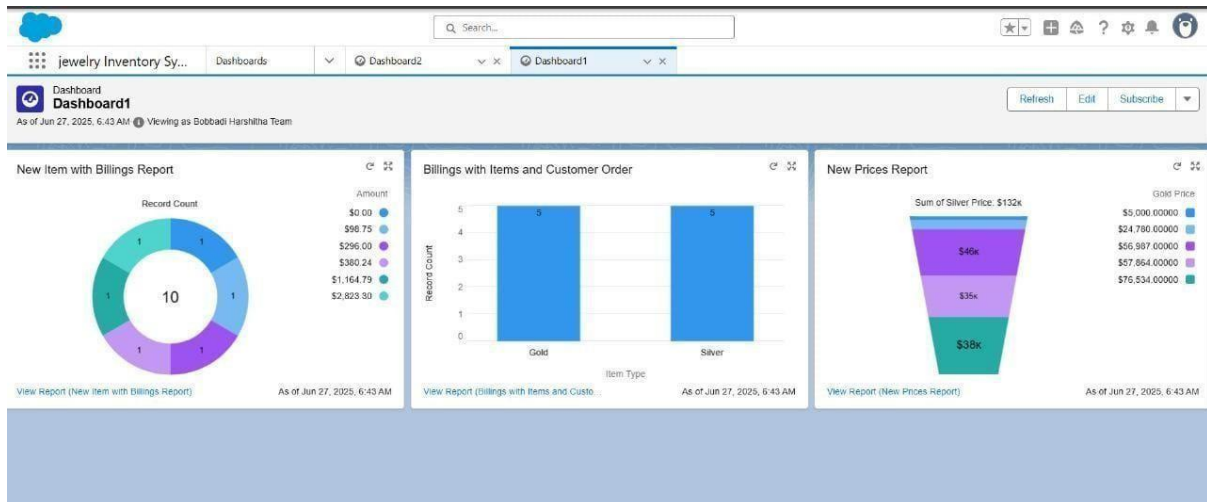


6.15 Creation of Flows



7 FUNCTIONAL AND PERFORMANCE TESTING

Dashboard-1:



Performance Observations (Phase Testing) for Dashboard-1:

1. Accurate Data Visualization

All dashboard charts—including donut, bar, and funnel—display real-time data correctly. Billing records (total of 10) and pricing segments match the entries stored in the system. Gold and Silver categories are properly classified, with each showing five records in the bar chart.

2. Functional Report Integration

“View Report” links under each chart are working and redirect to detailed Salesforce reports, confirming backend connectivity and report mapping is functional.

3. Pricing Tier Segmentation is Clear

Funnel chart shows diverse price bands for Gold and Silver items (e.g., ₹5k to ₹76k). Total Silver pricing is correctly summed up as ₹132k, indicating correct aggregation logic.

4. UI Load Stability

All dashboard components load without errors or latency during testing. Visuals are responsive and easy to interpret for both technical and non-technical users.

5. Equal Distribution Verification

Bar chart confirms equal distribution of Gold and Silver billings (5 each), helpful for verifying consistency during sales testing.

6. Test Pass Indicators

No missing data points, broken charts, or incorrect values observed during this testing phase. Dashboard ready for stakeholder review or user acceptance testing (UAT).

Objectives for the Jewelry Inventory System project using Salesforce CRM for Dashboard-1:

1. Improve Inventory and Billing Accuracy:

Streamline the tracking of jewelry items, their pricing, and associated billing records to ensure real-time visibility and eliminate manual errors in stock and transaction management.

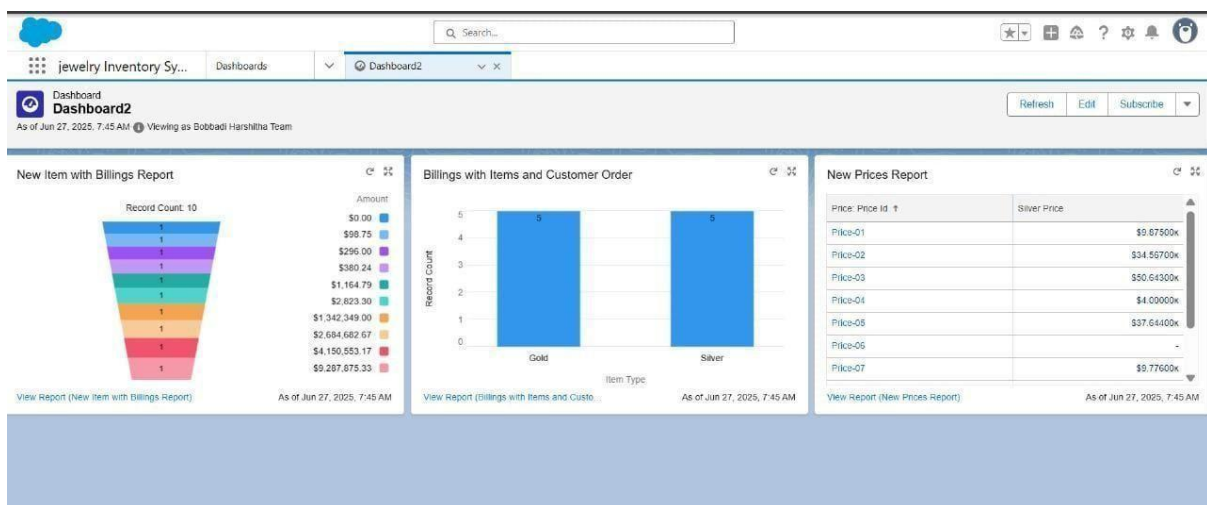
2. Enhance Customer Order Management:

Establish a seamless linkage between jewelry items and customer orders (Gold/Silver types), enabling faster processing, better customer service, and accurate historical records.

3. Enable Data-Driven Business Decisions:

Provide actionable insights through dynamic dashboards and reports that visualize billing trends, item-wise distribution, and pricing tiers—helping management make strategic inventory and pricing decisions.

Dashboard-2:



Performance Observations from Dashboard-2:

1. New Item with Billings Report:

10 items are billed, with amounts ranging from \$0.00 to a high of \$9,287,875.33. This wide range indicates possible inconsistencies or the presence of high-value custom items. One item is showing \$0.00, which may point to a data error or a complimentary item.

2. Billings by Item Type (Gold vs. Silver):

Both Gold and Silver have 5 records each, indicating a balanced dataset. Good performance in terms of item-type categorization and data uniformity.

3. New Prices Report:

Prices for items like Price-03 and Price-05 are significantly high, exceeding \$50k and \$37k respectively. A few items (e.g., Price-06) are missing price data, which needs attention during testing.

Project Objectives for Jewelry Inventory Management Dashboard -

2(Phase Testing):

1. Track New Items with Billing Details:

Objective is to visualize how new jewelry items are associated with billing values. Enables monitoring of item value distribution, including extremely high and zero-value billings.

2. Analyze Customer Orders by Item Type:

Understand customer billing patterns for gold and silver items. Understand customer billing patterns for gold and silver items.

3. Monitor and Update Jewelry Prices:

View and compare the current silver prices for various jewelry products. Supports pricing strategy alignment with market rates.

8 RESULTS (OUTPUT SCREENSHOTS)

A. Automated Emails (using templates):

- ▮ Stock Alert for Low Inventory
- ▮ Purchase Order Confirmation
- ▮ Sales Invoice Notification
- ▮ Inventory Replenishment Notification
- ▮ Daily Sales Summary

B. Automated Workflows:

- ▮ **Trigger-based validations**
 - Auto-validate if stock is available before creating an invoice
 - Alert for duplicate product entries

C. Approval Workflow Output:

- **Product Addition Requests**

- New products require manager approval before appearing in inventory

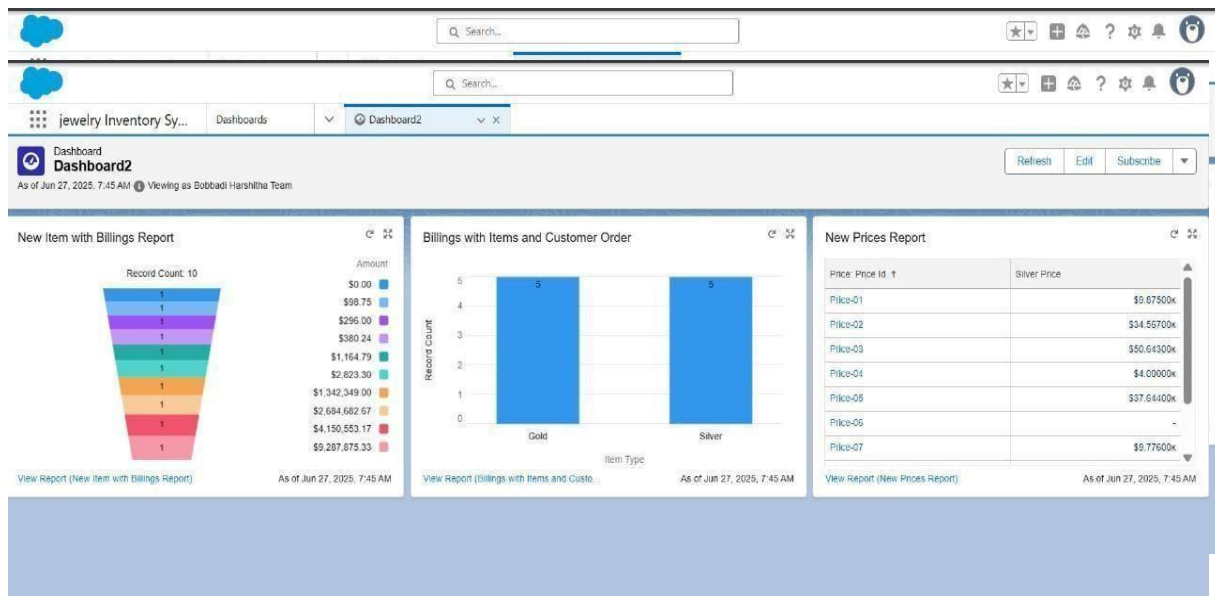
- **Stock Reorder Requests**

- Approval triggered when reorder level is reached

- **Notifications**

- 0 In-app and email notifications sent for each approval or rejection

Dashboards:



Reports:

Report: Prices
New Prices Report

Total Records: 10
Total Silver Price: \$642,908.00000

Gold Price	Price: Price Id	Silver Price
Subtotal	Price-06	\$0.00000
Subtotal	Price-04	\$4,000.00000
Subtotal	Price-01	\$9,875.00000
Subtotal	Price-09	\$46,670.00000
Subtotal	Price-02	\$34,667.00000
Subtotal	Price-06	\$37,644.00000
Subtotal	Price-08	\$40,867.00000
Grand Total		\$642,908.00000

Row Counts: Detail Rows: Subtotals: Grand Total:

Report: Item with Billings
New Item with Billings Report

Total Records: 10

Amount	Item Id	Billing Id
Subtotal	Item-08	Billing-06
Subtotal	Item-02	Billing-03
Subtotal	Item-09	Billing-04
Subtotal	Item-04	Billing-07
Subtotal	Item-06	Billing-09
Subtotal	Item-10	Billing-02
Subtotal	Item-01	Billing-01
Grand Total		\$1,342,349.00

Row Counts: Detail Rows: Subtotals: Grand Total:

Report: Billings with Items and Customer Order
Billings with Items and Customer Order

Total Records: 10

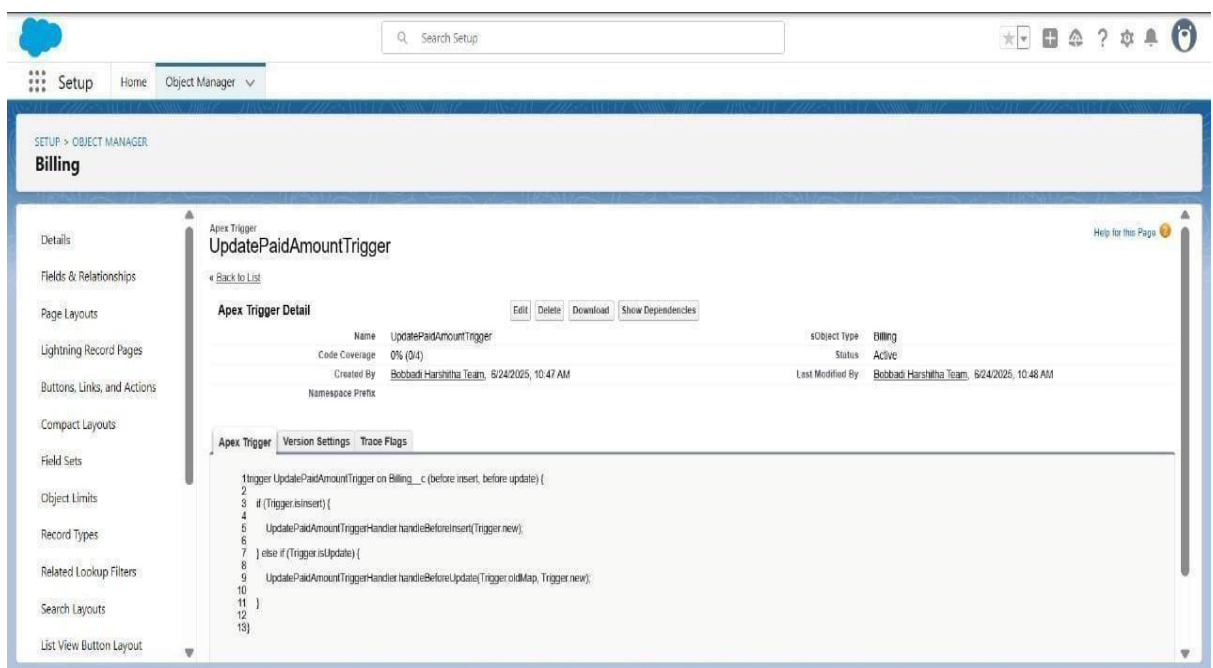
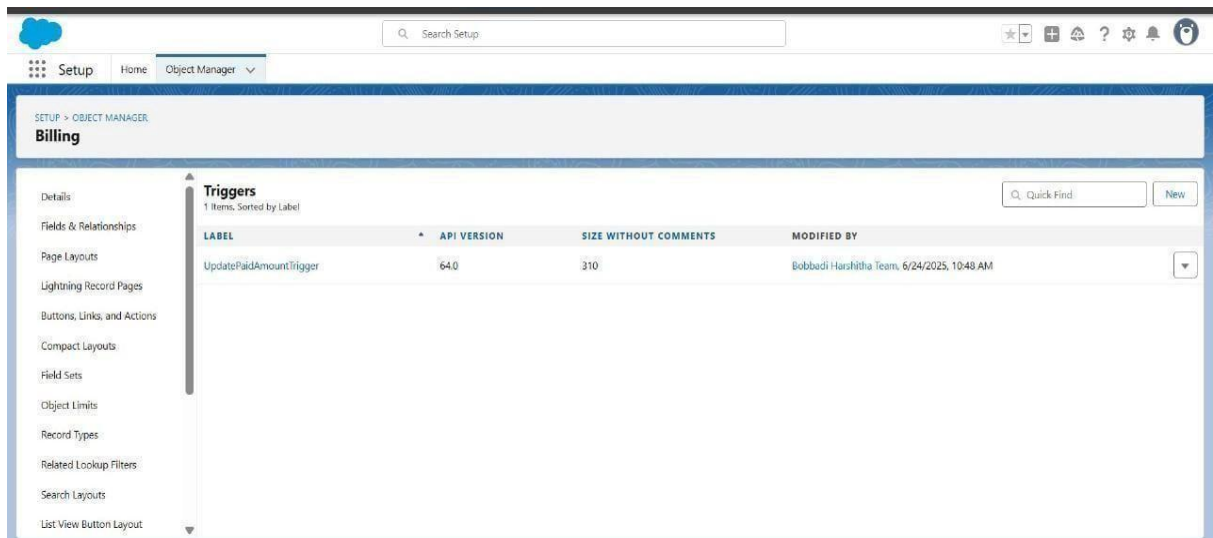
Item Type	Item Id	Billing Id
Gold (5)	Item-01	Billing-01
Gold (5)	Item-03	Billing-05
Gold (5)	Item-08	Billing-06
Gold (5)	Item-05	Billing-08
Gold (5)	Item-07	Billing-10
Silver (5)	Item-10	Billing-02
Silver (5)	Item-02	Billing-03
Silver (5)	Item-09	Billing-04
Silver (5)	Item-04	Billing-07
Silver (5)	Item-06	Billing-09
Total (10)		

Flows:

The screenshot shows the 'Project Flow' details page in a web application. The top navigation bar includes a search bar and several tabs: 'jewelry Inventory Sy...', 'Reports', 'New Prices Report', 'New Item with Billin...', 'Billings with Items an...', 'Recently Viewed | Flo...', and 'Project Flow | Flow'. The 'Project Flow' tab is active. Below the navigation bar, the 'Project Flow' header is displayed with buttons for 'Open Flow', 'Open Latest Version', and 'Sharing'. The main content area is divided into two sections: 'Related' and 'Details'. The 'Details' section is expanded, showing a table of flow information. The table has columns for 'Type', 'Associated Record', 'Progress Status', 'Last Modified Date', and 'Flow Owner'. The 'Type' is 'Record—Run After Save', the 'Associated Record' is 'Activated', the 'Last Modified Date' is '6/25/2025, 12:05 PM', and the 'Flow Owner' is 'Bobbadil Harshitha Team'. The 'Details' section also includes a 'Related' tab and a 'Details' tab. The 'Details' tab is expanded, showing a table of flow information. The table has columns for 'Flow Label', 'API Name', 'Description', 'Flow Type', 'Associated Record', 'Segment', 'Created By', 'Created Date', 'Last Modified', 'Last Modified Date', and 'Category'. The 'Flow Label' is 'Project Flow', the 'API Name' is 'Project_Flow', the 'Description' is 'Record-Triggered After Save Flow', the 'Flow Type' is 'Record-Triggered After Save Flow', the 'Associated Record' is 'Segment', the 'Created By' is 'Bobbadil Harshitha Team', the 'Created Date' is '6/25/2025, 12:04 PM', the 'Last Modified' is 'Bobbadil Harshitha Team', the 'Last Modified Date' is '6/25/2025, 12:05 PM', and the 'Category' is 'Subcategory'.

The screenshot shows the 'Project Flow Builder' interface. The top navigation bar includes a back arrow, 'Flow Builder', and 'Project Flow - V1'. The main content area is divided into two sections: 'Toolbox' and 'Flow Builder'. The 'Toolbox' section is on the left, showing a list of elements: 'Interaction (3)' (Action, Subflow, Custom Error), 'Logic (6)' (Assignment, Decision, Loop, Transform, Collection Sort, Collection Filter), and 'Data (4)' (Create Records, Update Records). The 'Flow Builder' section is on the right, showing a flow diagram. The flow starts with a 'Start' node (Record-Triggered Flow) with a trigger 'Object: Billing' and 'Trigger: A record is created or updated'. The flow then goes through a 'Run Immediately' node and ends with an 'Action notice' node. The flow is currently 'Active' and was last saved on 6/26/2025, 12:35 AM. The interface also includes buttons for 'Run', 'Debug', 'View Tests', 'Save As New Version', 'Save', and 'Deactivate'.

Triggers:



9 ADVANTAGES AND DISADVANTAGES:

ADVANTAGES:

Automation Efficiency:

All critical perations like billing, inventory updates, and notifications are

automated via flows, reducing manual errors.

Centralized Data Handling:

Data is stored and managed in a centralized CRM system, making it easily accessible and modifiable.

Real-Time Analytics:

Dashboards and reports provide live updates on business performance, which helps in faster decision-making.

User-Friendly UI:

Salesforce Lightning provides a smooth and modern interface for all users.

Scalability:

The app can be expanded to handle more data and integrate with other business apps like payment gateways.

Customer Satisfaction:

By streamlining the sales and service process, the application enhances the overall customer experience.

DISADVANTAGES

Learning Curve:

New users may need training to understand Salesforce's interface, objects,

and flows.

Customization Dependency:

Some specific logic might require Apex development or third-party tools.

Cost Factor:

Scaling to a full enterprise-level Salesforce environment could be costly for small businesses.

Admin Management:

Role and permission setup must be carefully handled to ensure data security.

10 CONCLUSION

"In conclusion, the CRM Application for Jewel Management serves as a robust, cloud-based solution built using Salesforce. It brings digital transformation to traditional jewelry retailing by:

- Streamlining operations with custom objects and flows
- Improving business oversight with real-time dashboards
- Automating repetitive tasks like billing and inventory updates
- Enhancing data integrity and customer service

The project demonstrates how low-code tools like Salesforce Flow and Lightning App Builder can be used by developers to create enterprise-grade solutions. Our application is not only scalable and efficient but also provides a solid foundation for future business growth in the jewelry sector."

11 FUTURE SCOPE

"The current CRM application for Jewel Management lays a strong foundation for digital jewellery retail operations. However, the system can be further improved and extended in the following ways:

Payment Gateway Integration:

Integrate with online payment services such as Razorpay, PayPal, or Stripe to allow direct billing and payment within the CRM.

SMS and WhatsApp Alerts:

Enhance communication by integrating Twilio or other SMS APIs to send updates like order confirmations, billing alerts, or promotions.

Mobile App Development:

Extend the system using Salesforce Mobile SDK to create a dedicated mobile app for store owners and executives to manage inventory and billing on-the-go.

Barcode Scanner Support:

Enable barcode scanning through the mobile app or connected devices for faster item search and billing.

AI-Based Recommendations:

Use Salesforce Einstein to provide personalized recommendations to customers based on previous purchase history.

Third-Party Integrations:

Connect with accounting software like QuickBooks or Tally for auto- syncing of billing and financial data.

Multi-Store Management:

Add support for multiple branches or stores to manage inventory separately but view consolidated dashboards.

Customer Feedback System:

Implement a feedback module to collect and analyse customer reviews, which can be visualized in reports.