CRM Application for Jewel Management

COLLEGE : EINSTEIN COLLEGE OF ENGINEERING

TEAM ID : NM2025TMID05407

TEAM SIZE : 4

TEAM MEMBERS DETAILS:

TEAM LEADER: NELLAIAPPAN S

EMAIL : nellai2810@gmail.com

TEAM MEMBER : MOHAMMED AMJATH ILYAS M

EMAIL : mohammedamjath7862@gmail.com

TEAM MEMBER : SREE SUDHARSHAN V T

EMAIL : sudharshansri496@gmail.com

TEAM MEMBER : RATHNA PRAKASH S

EMAIL : prakashsrithar007@gmail.com

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.

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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

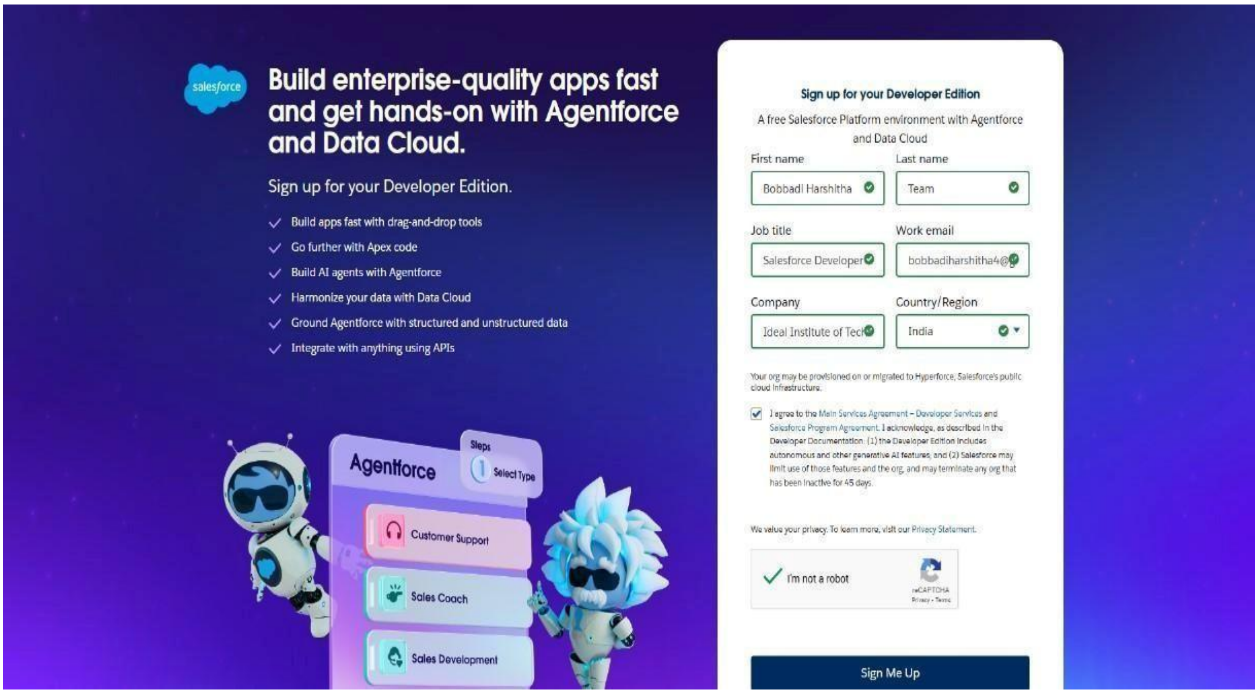
6. PROJECT DEVELOPMENT PHASE - SALESFORCE GUIDED PROJECT

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.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Go further with Apex code
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Integrate with anything using APIs
Agentforce
Steps
Select Type
Customer Support
Sales Coach
Sales Development
Sign up for your Developer Edition
A free Salesforce Platform environment with Agentforce and Data Cloud
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Last name
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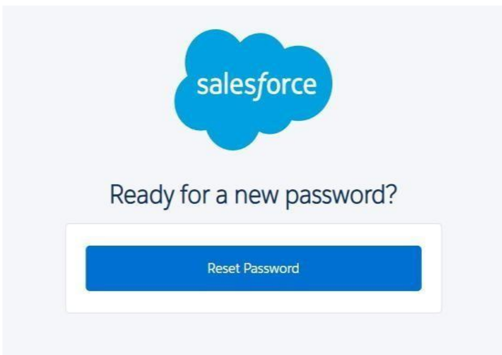
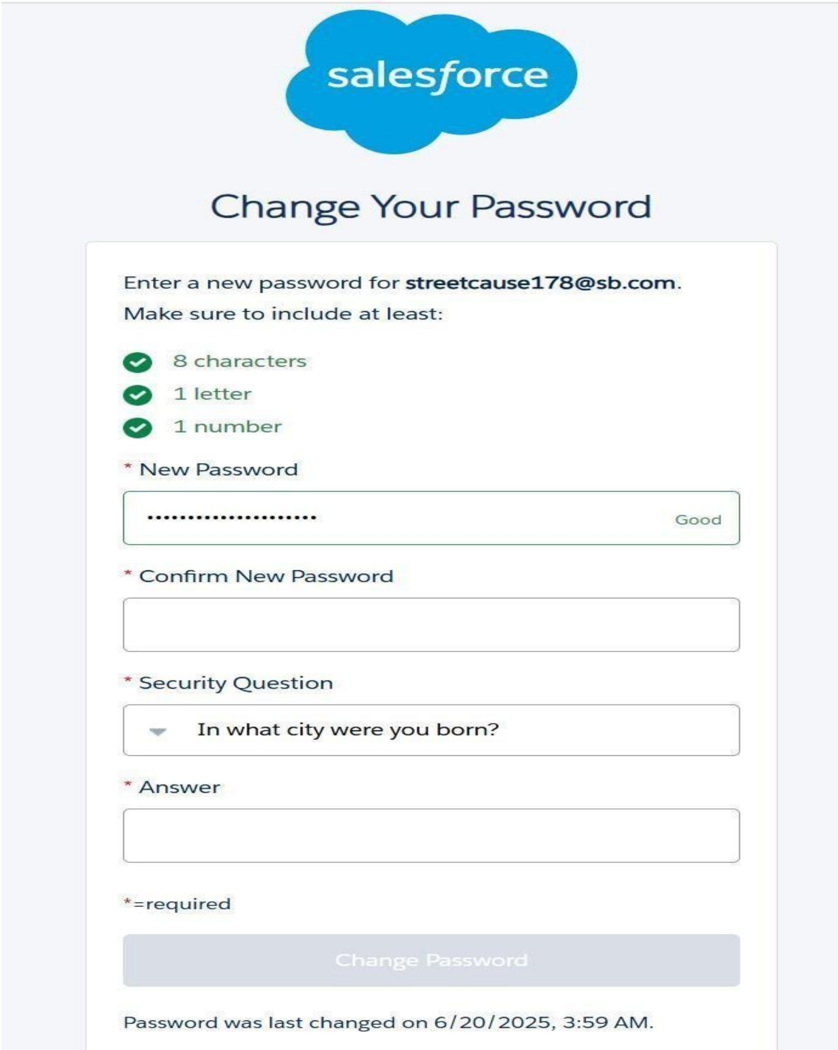
Company
Country/Region
India
I'm not a robot
Sign Me Up

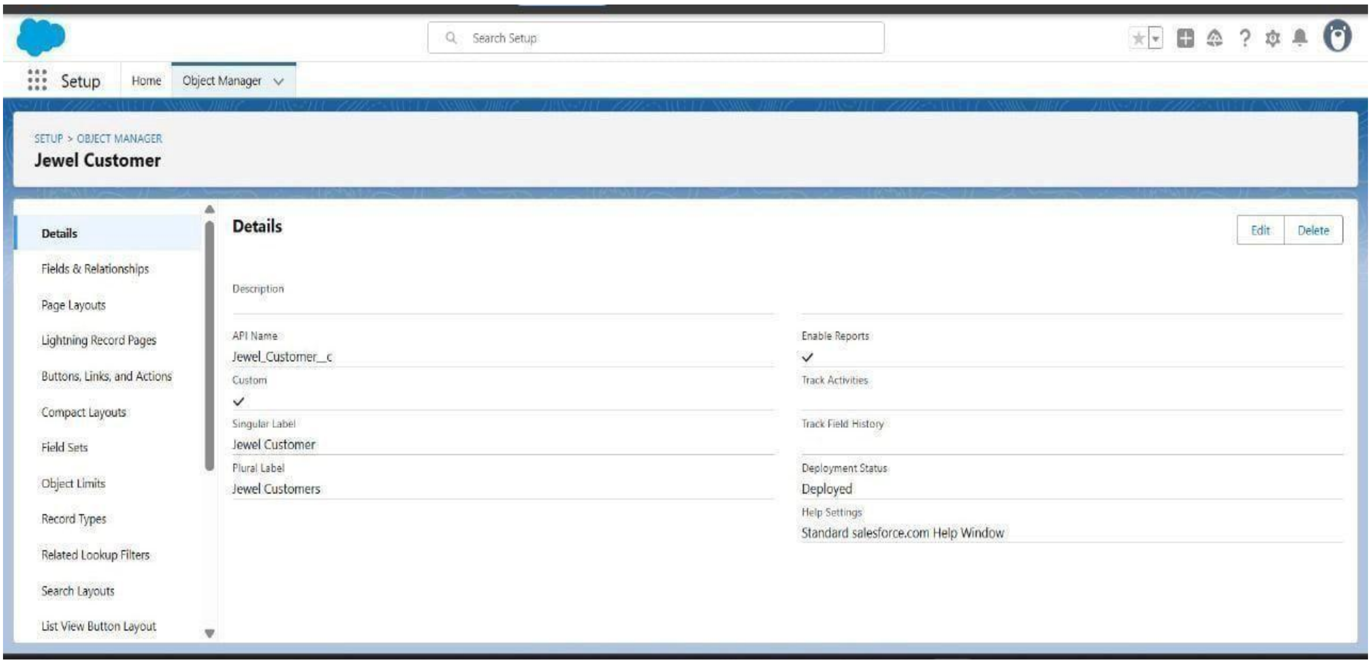

salesforce
Ready for a new password?
Reset Password



6.2 Custom Object Creation:

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

1. Jewel Customer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Home
Object Manager
SETUP > OBJECT MANAGER
Jewel Customer
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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
Jewel_Customer__c
Custom
Singular Label
Jewel Customer
Plural Label
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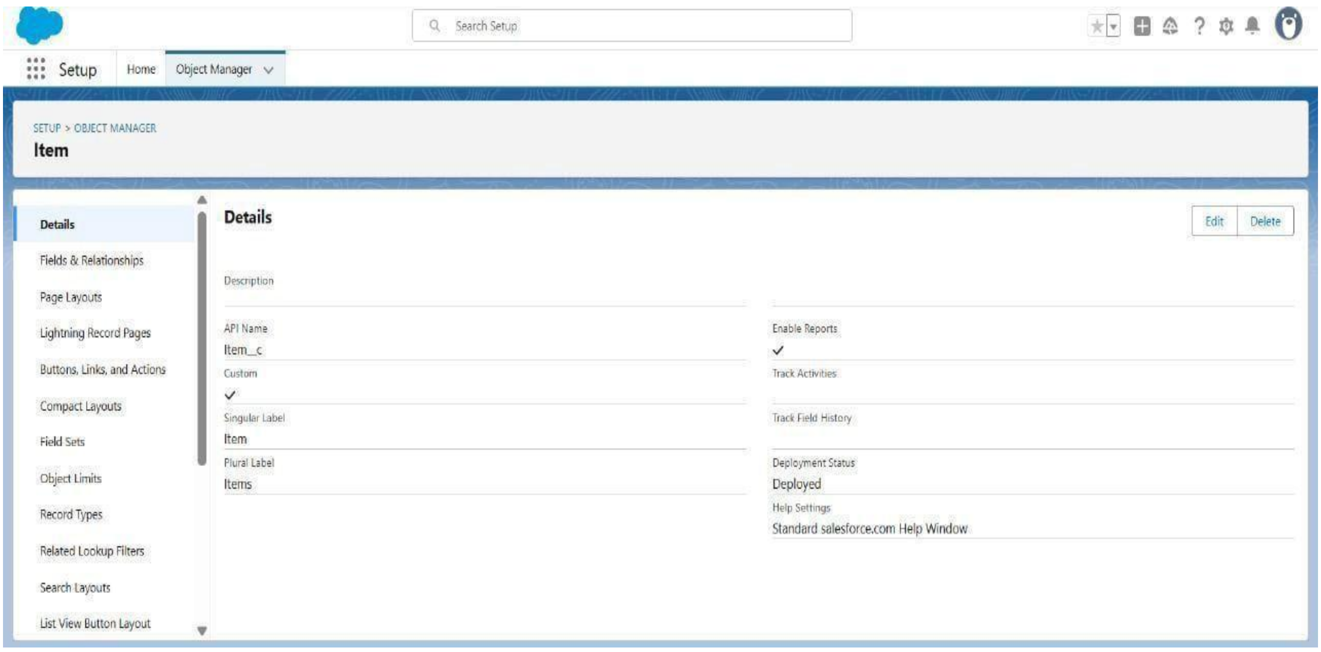
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

2. Item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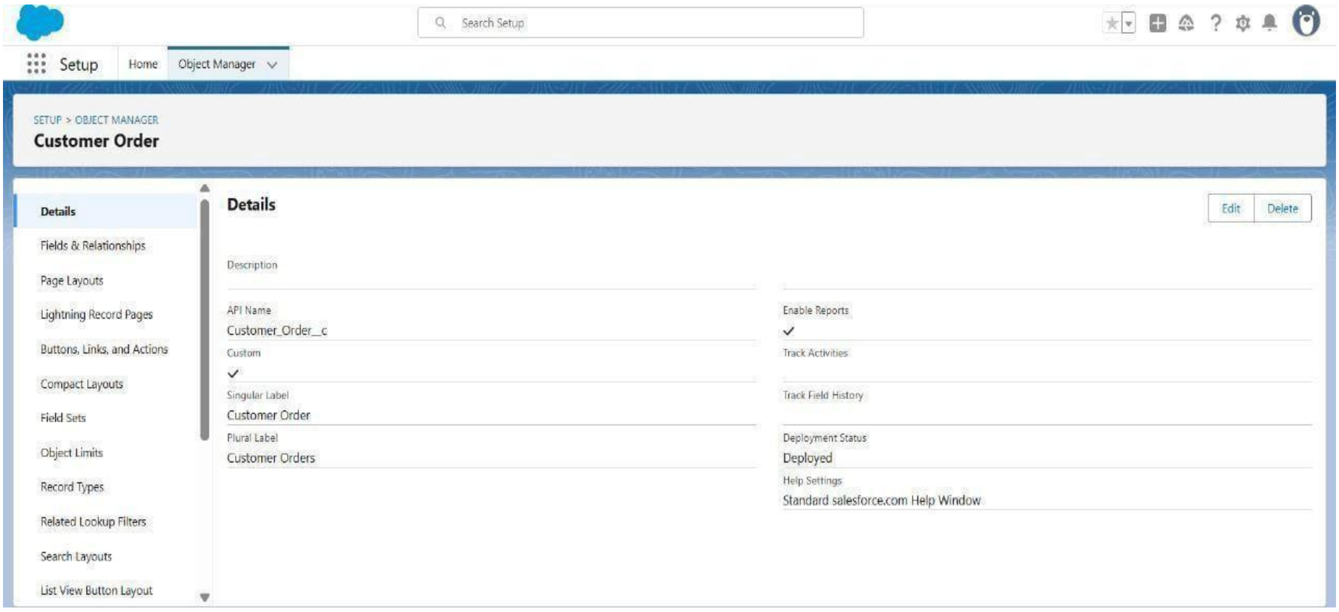
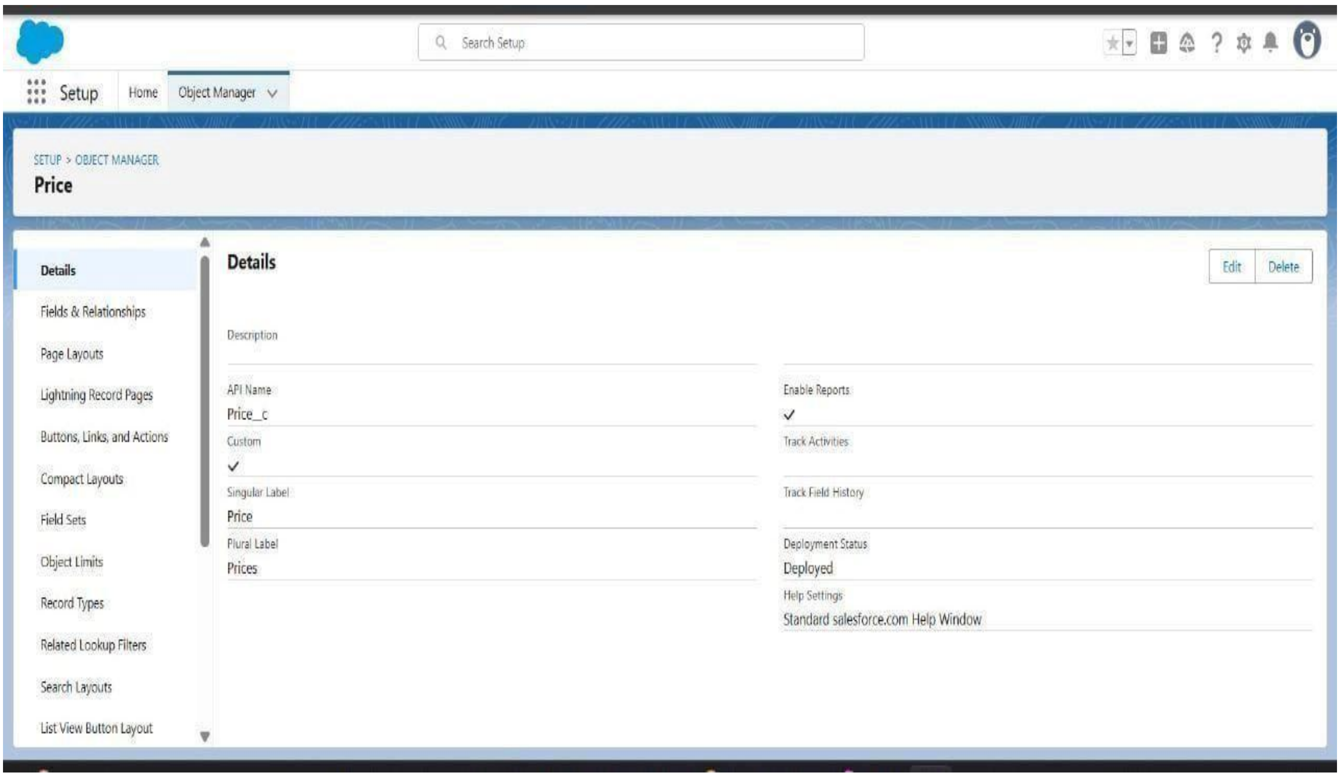
Plural Label
Items
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

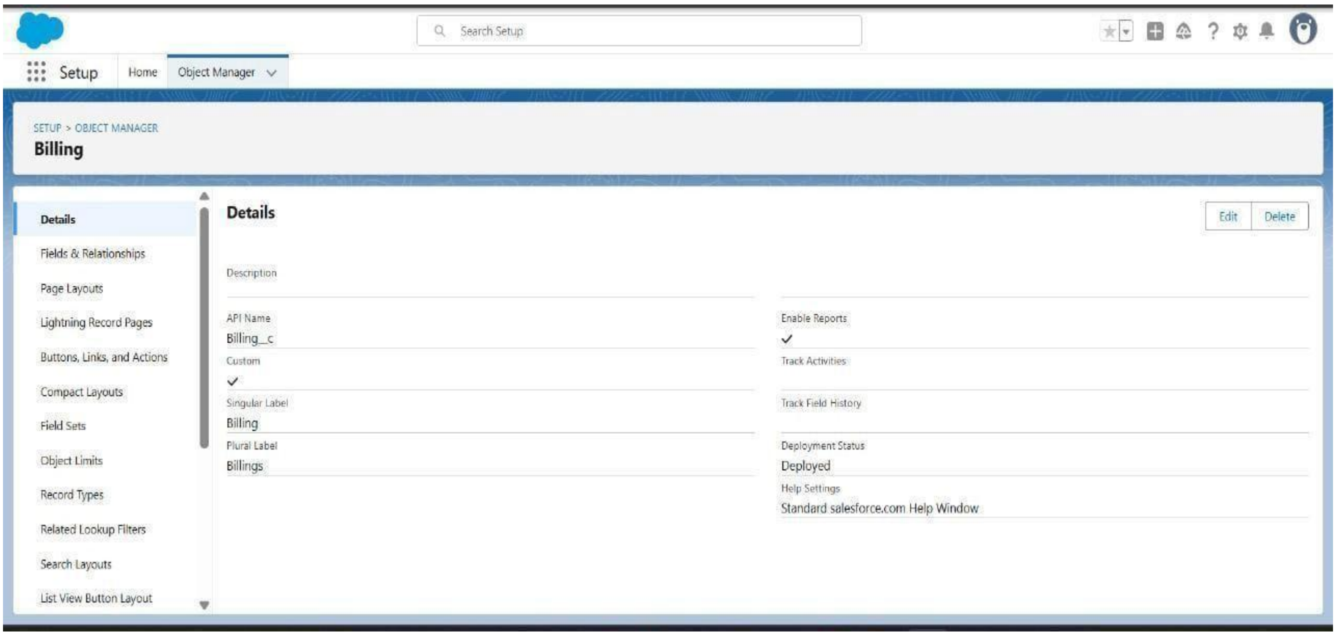
3. Customer Order



4. Price



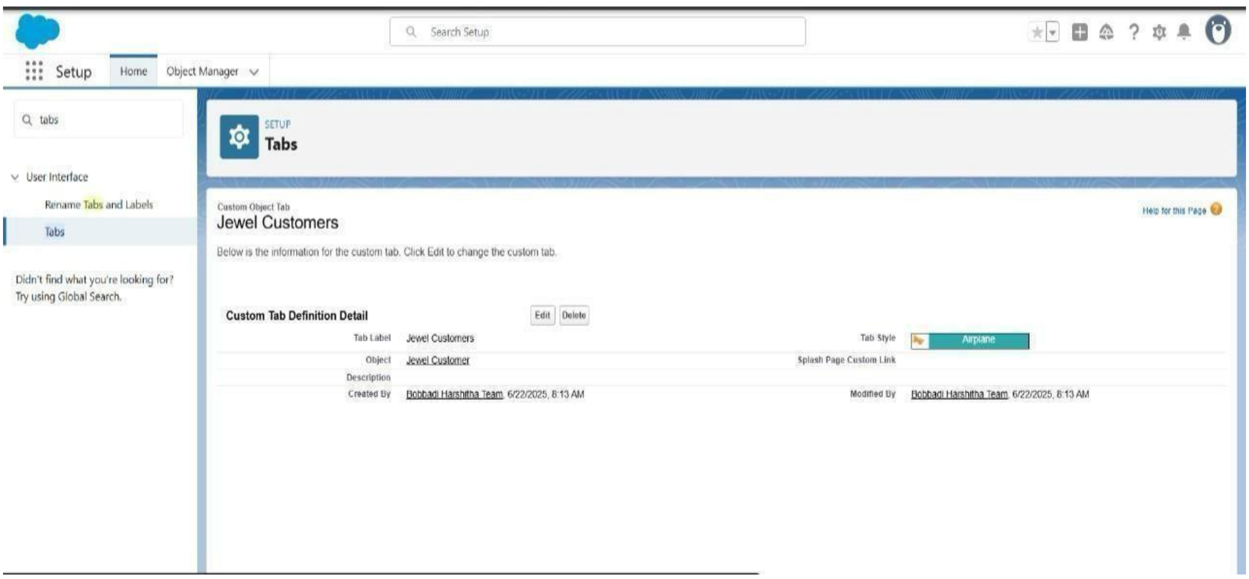
5. Billing



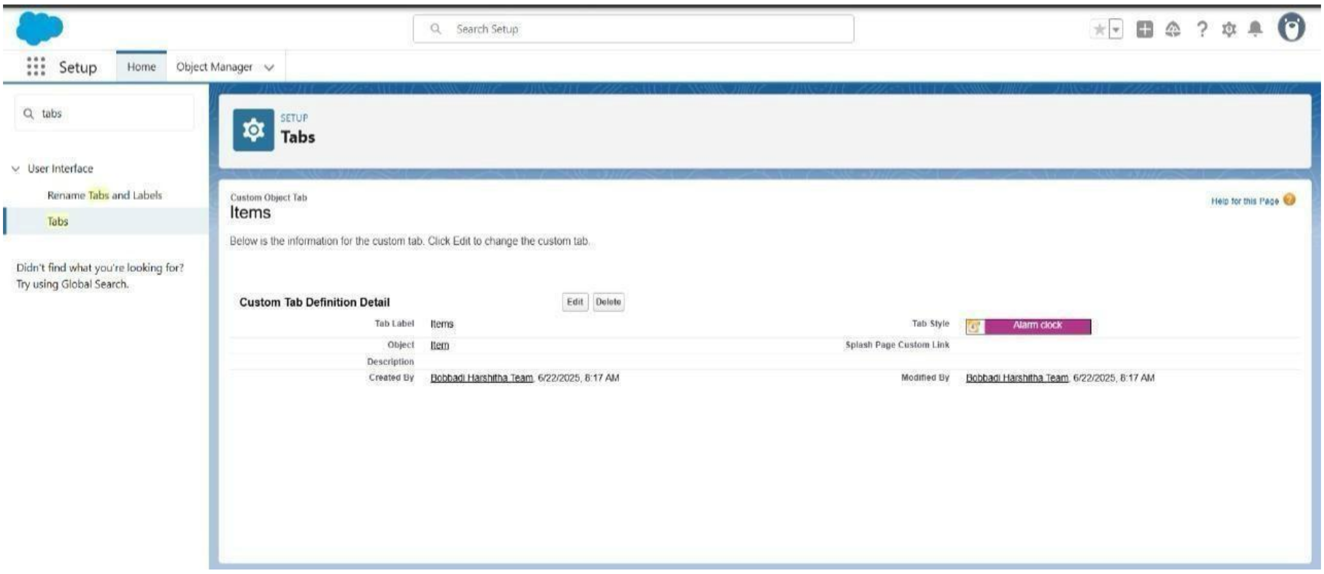
6.3 Creation of Tabs

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

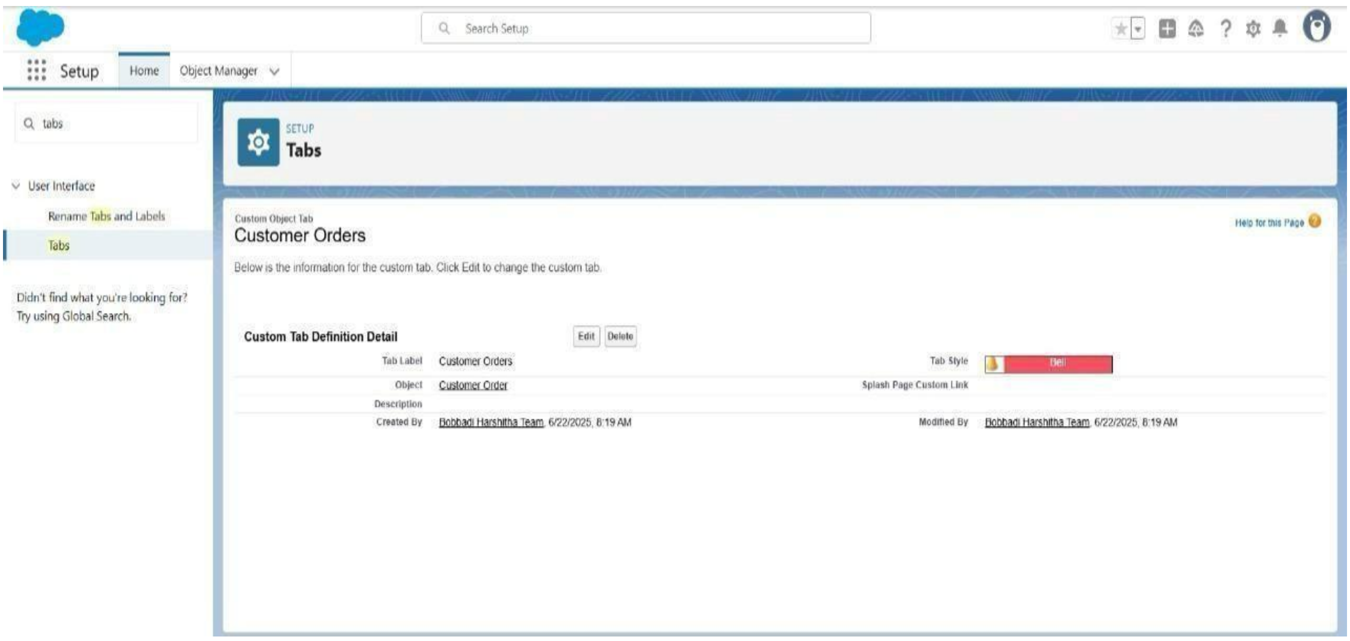
1. Jewel Customer



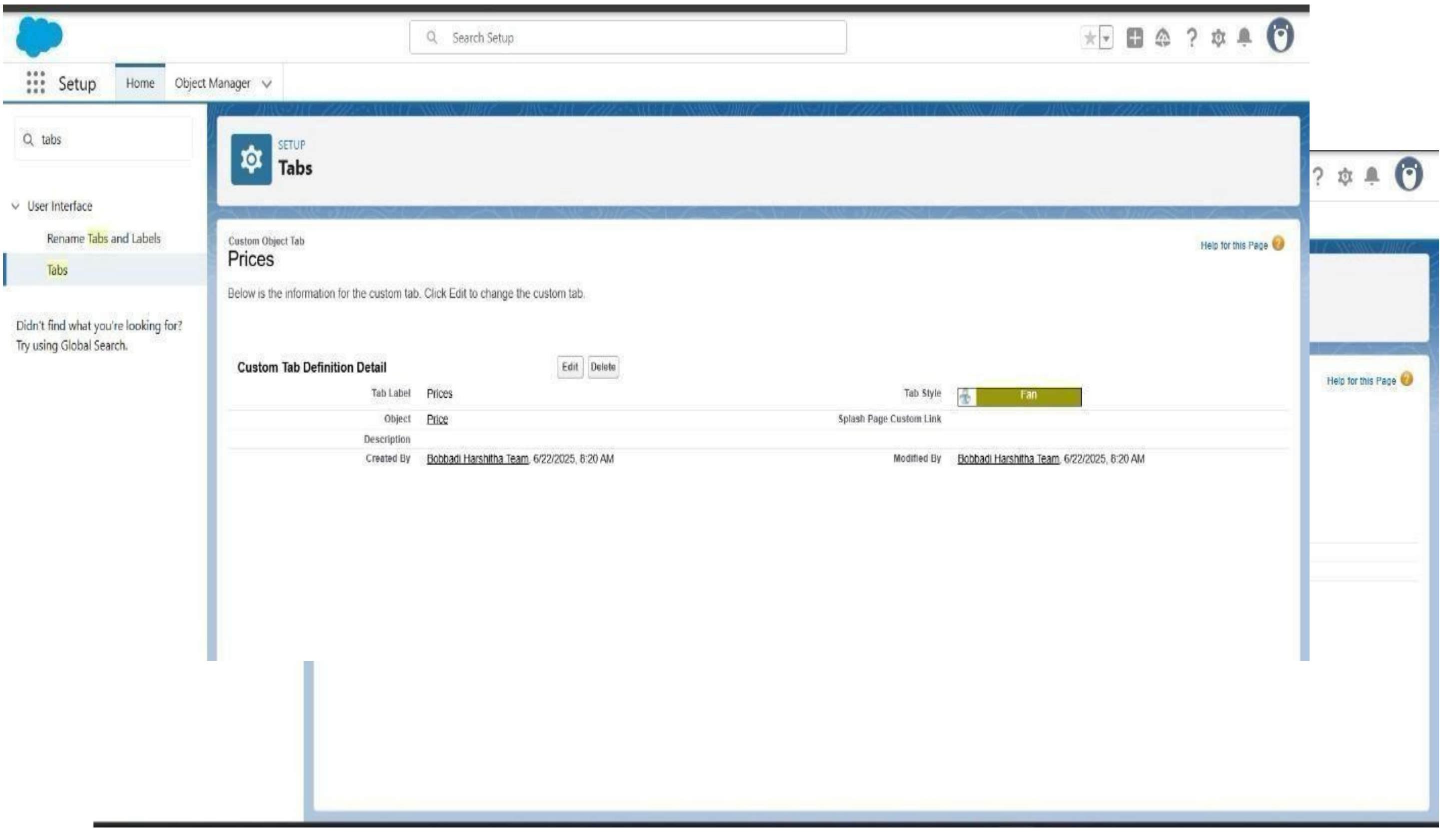
2. Item



3. Customer Order

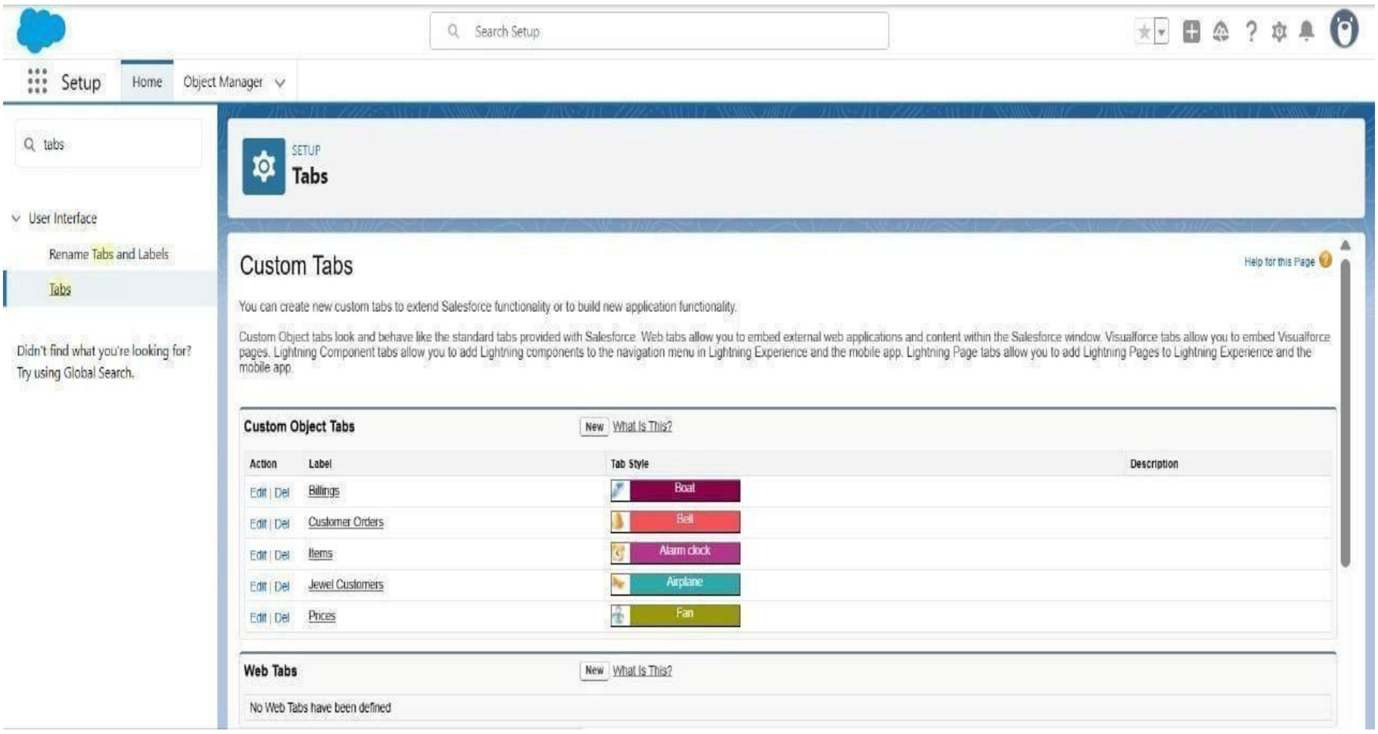


4. Price



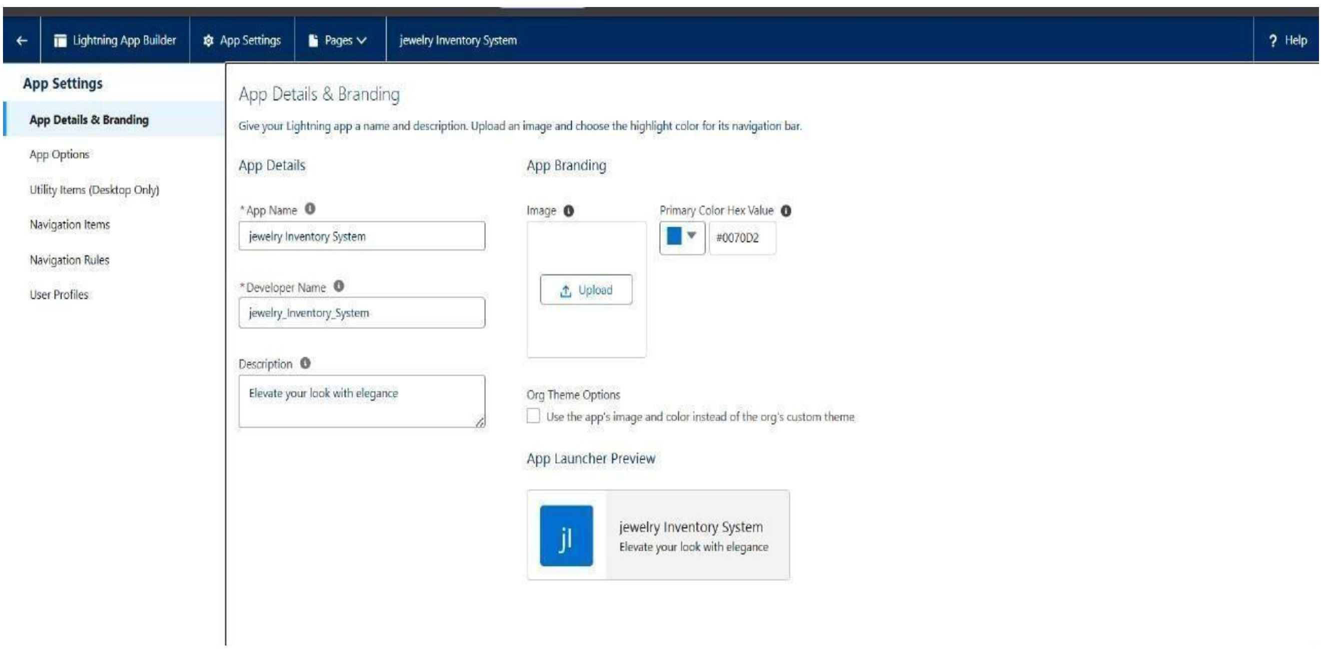
5. Billing

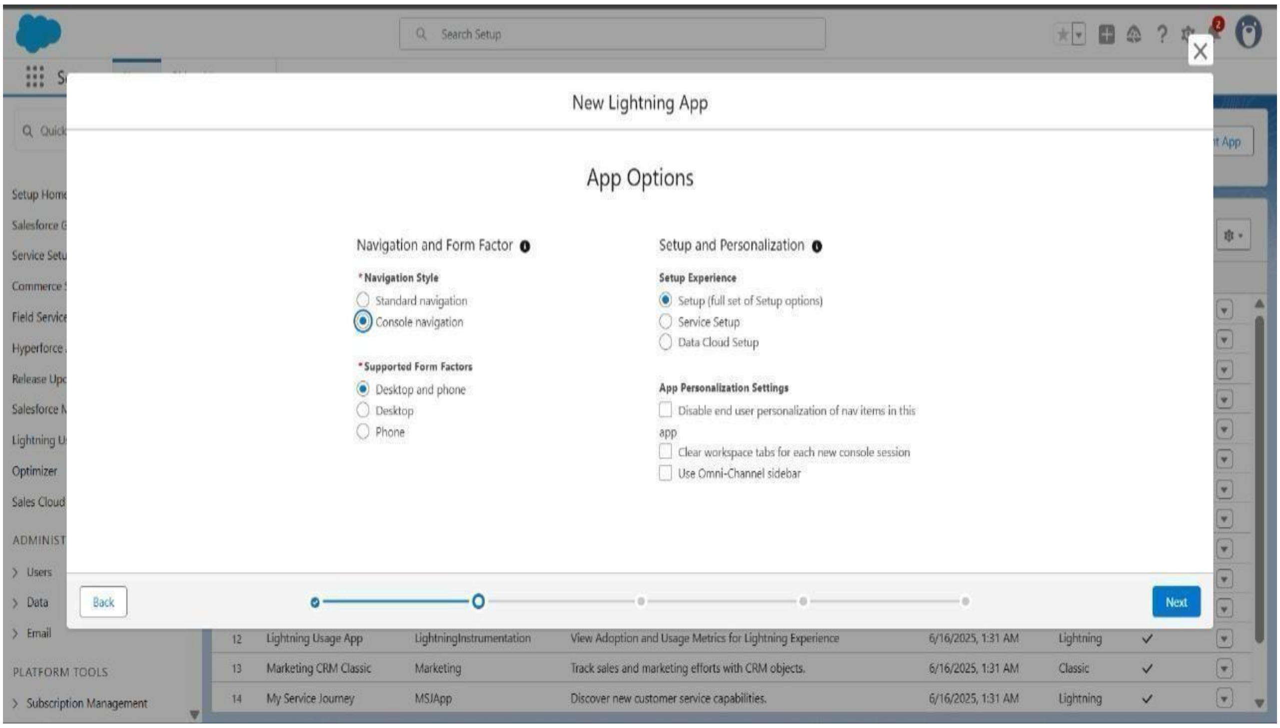
So we get the required all custom tabs as below



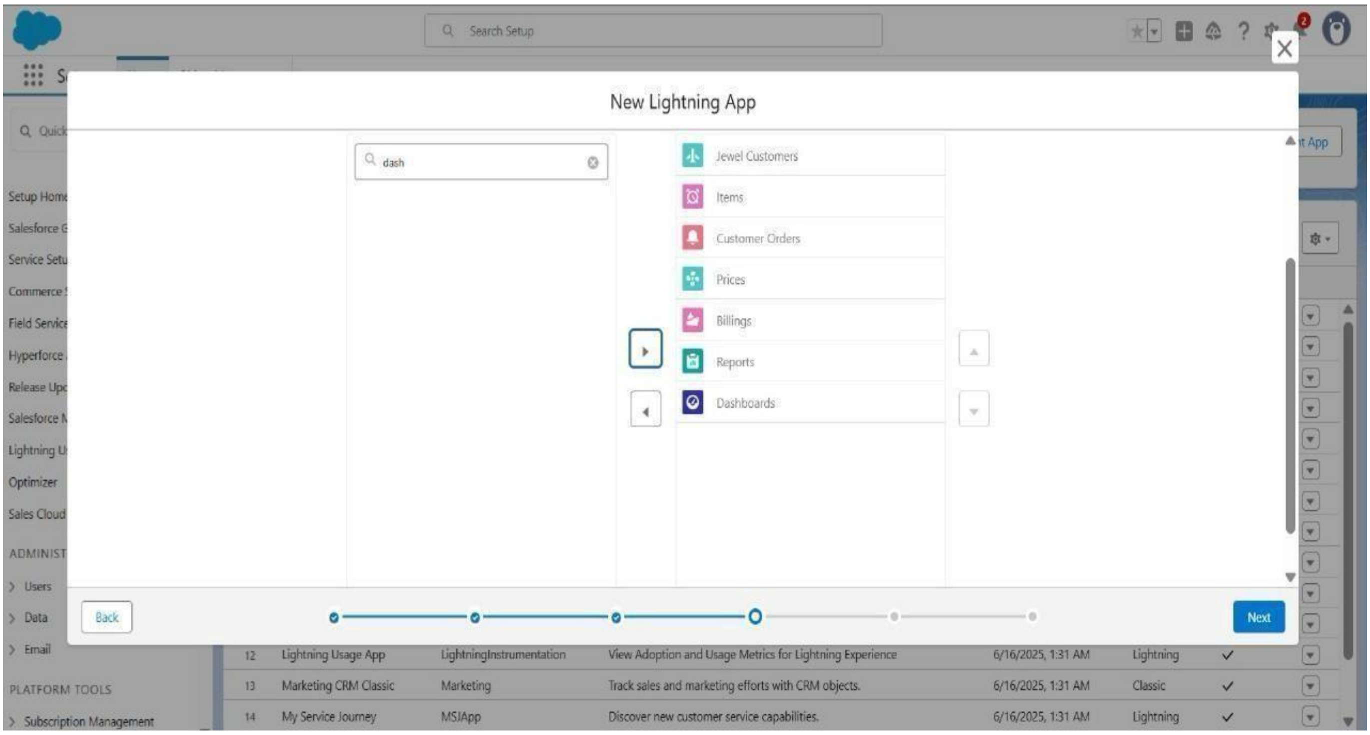
6.4 Creation of Lightning App

App Name: Jewelry Inventory System





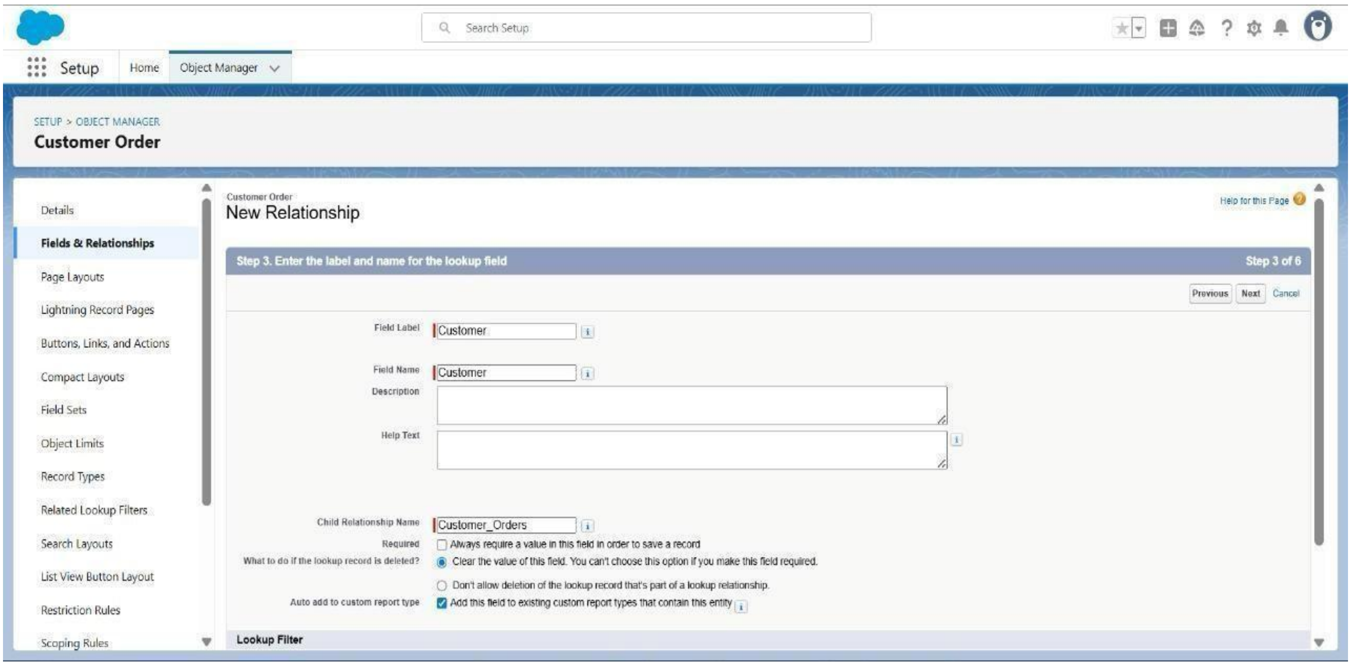
Navigation Items

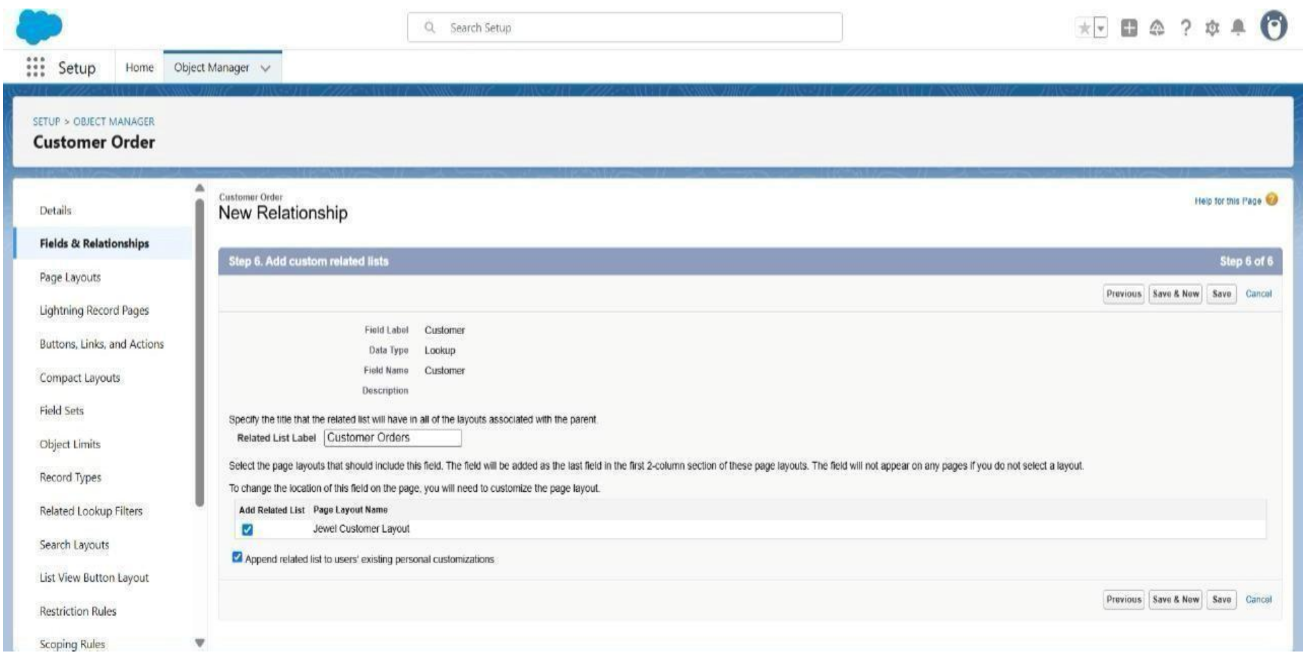


6.5 Creation of Fields

1. Creating lookup relationship

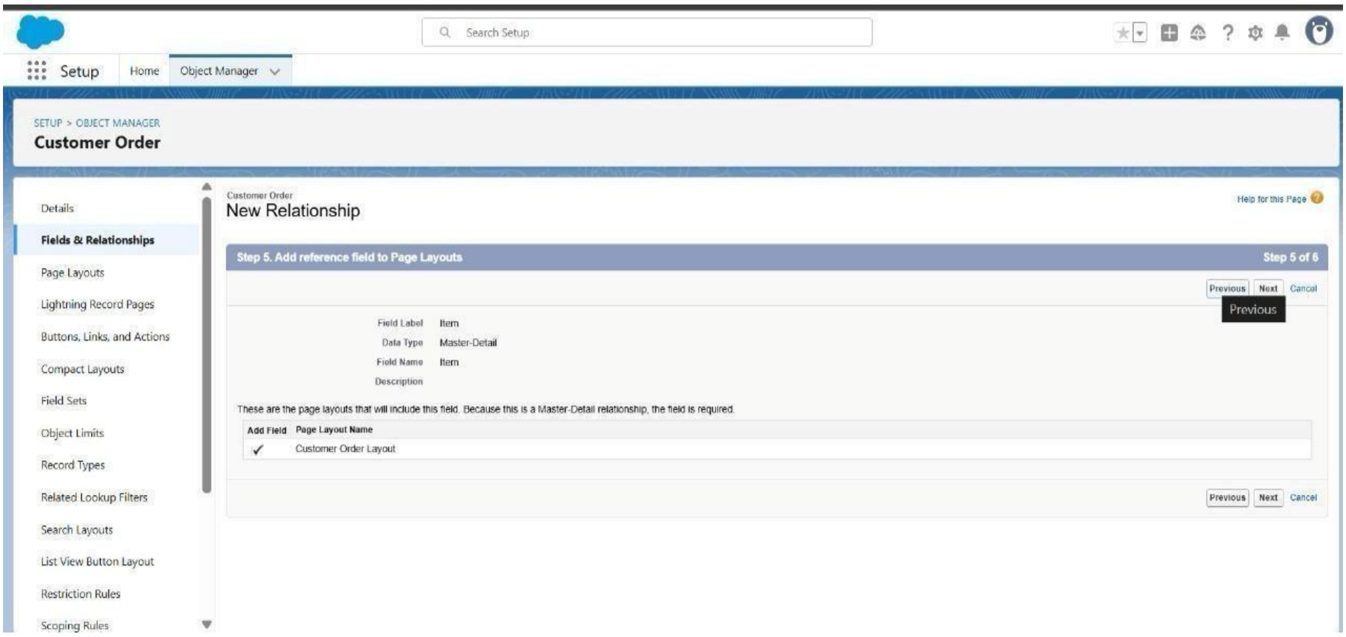
To Create a relationship between Jewel Customer & Customer Order Objects.

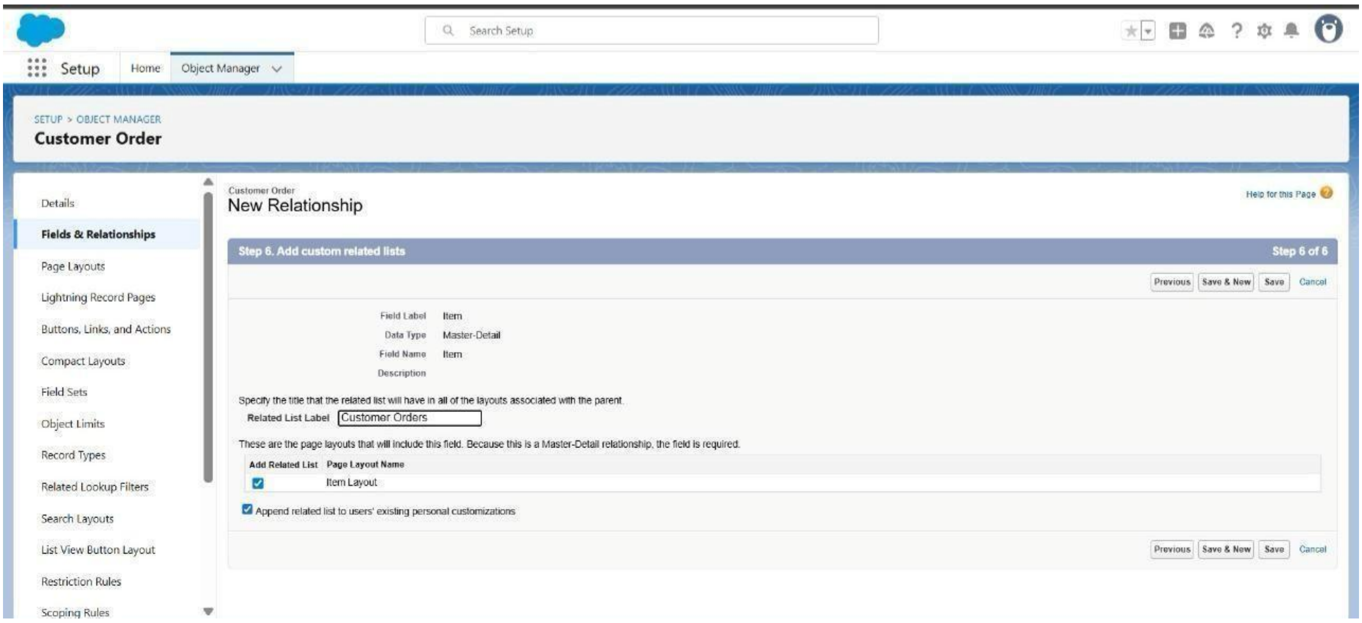




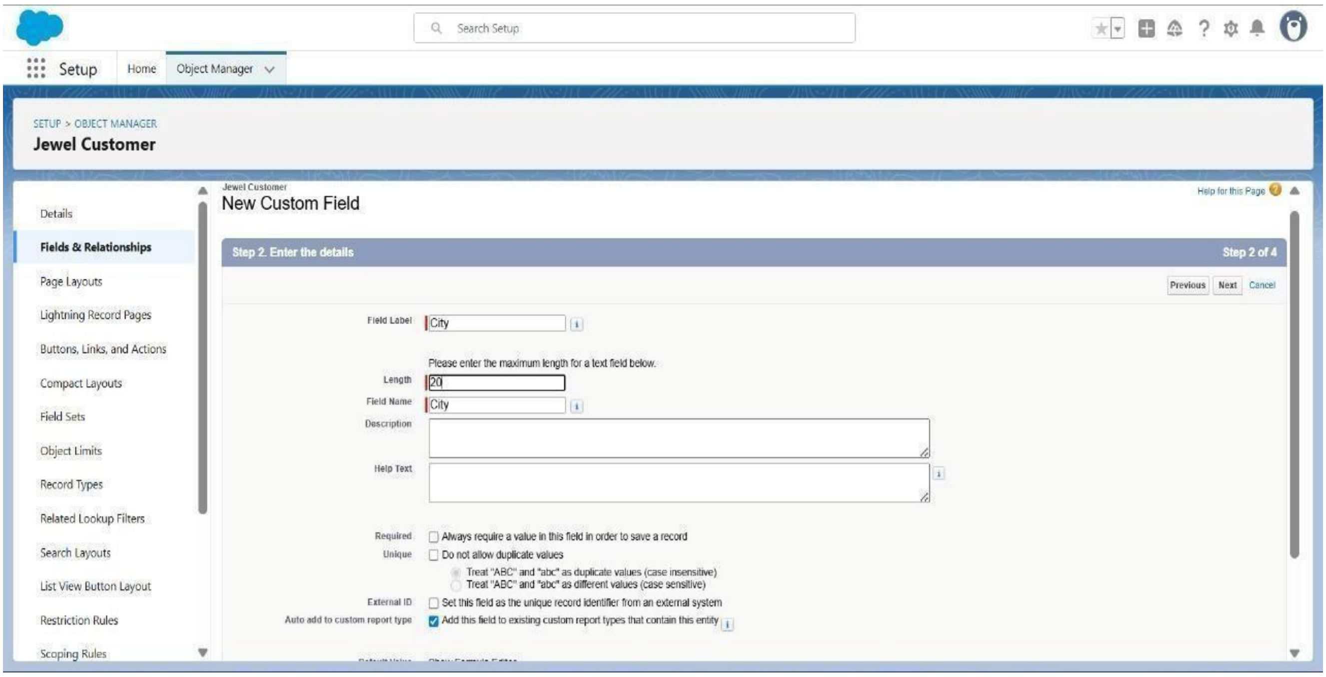
2. Creating a Master-Detail Relationship

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





3. Creating Text Field in Jewel Customer Object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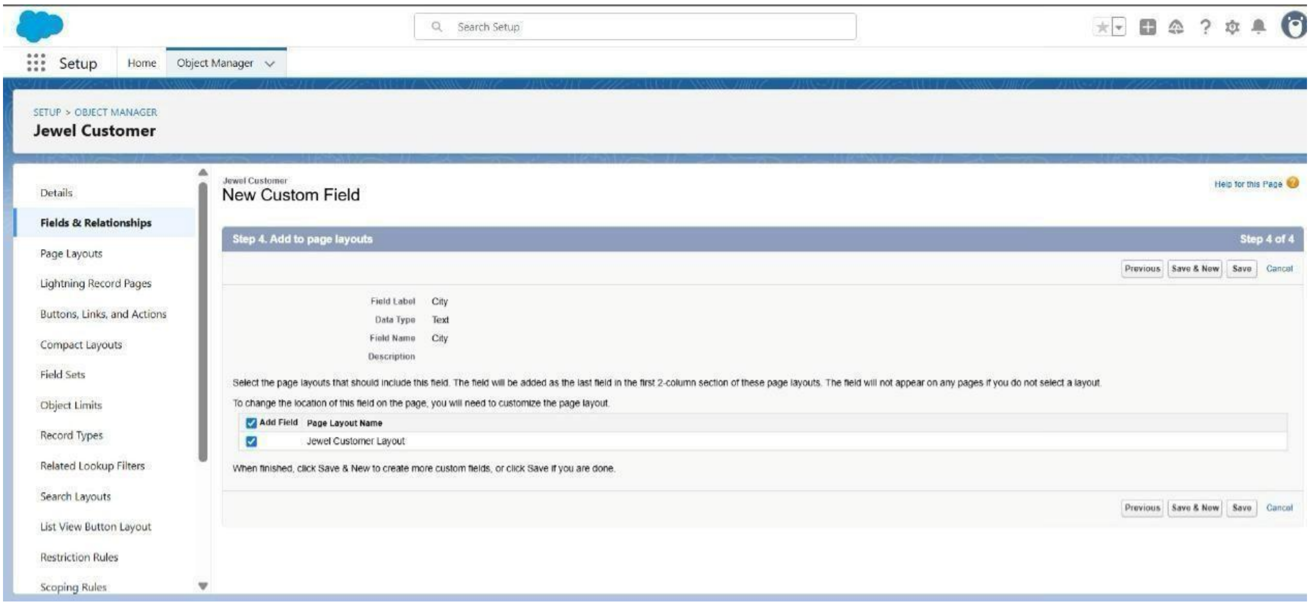
Jewel Customer
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Jewel Customer
New Custom Field
Help for this 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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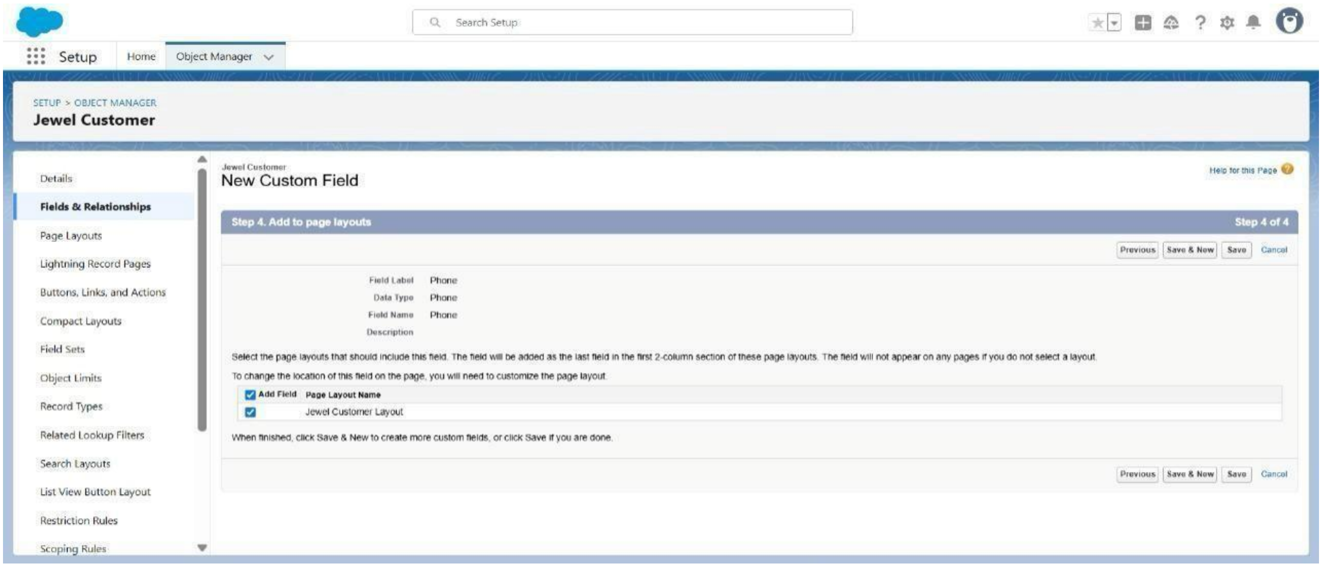
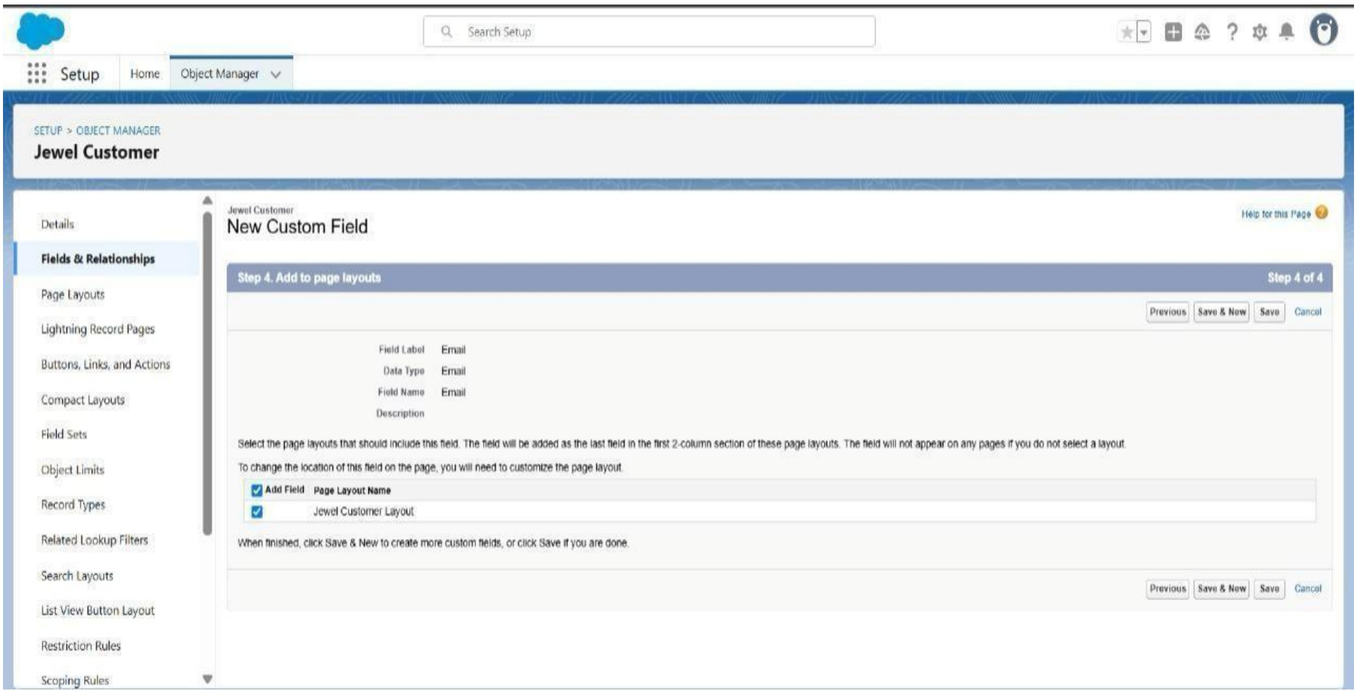
List View Button Layout
Restriction Rules
Scoping Rules
Jewel Customer
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label
City
Data Type
Text
Field Name
City
Description
Select the page layouts that should include this field. The field 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

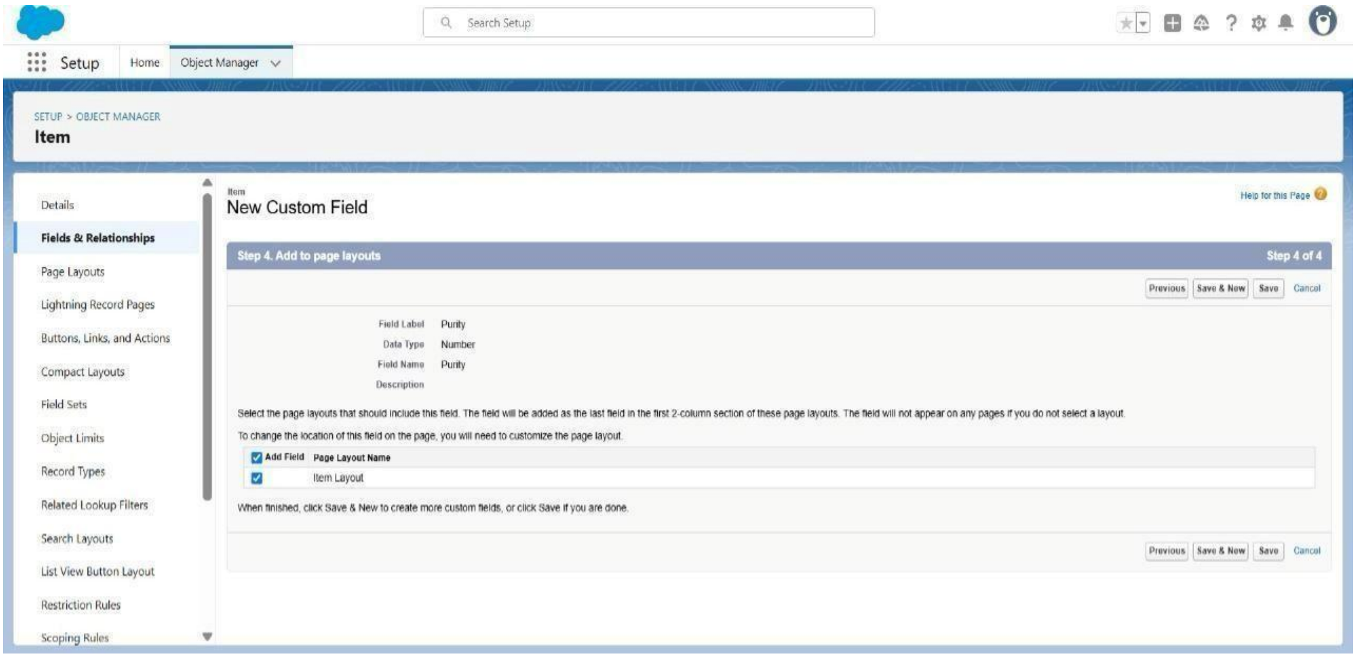
4. Creating the Phone field in object Jewel Customer



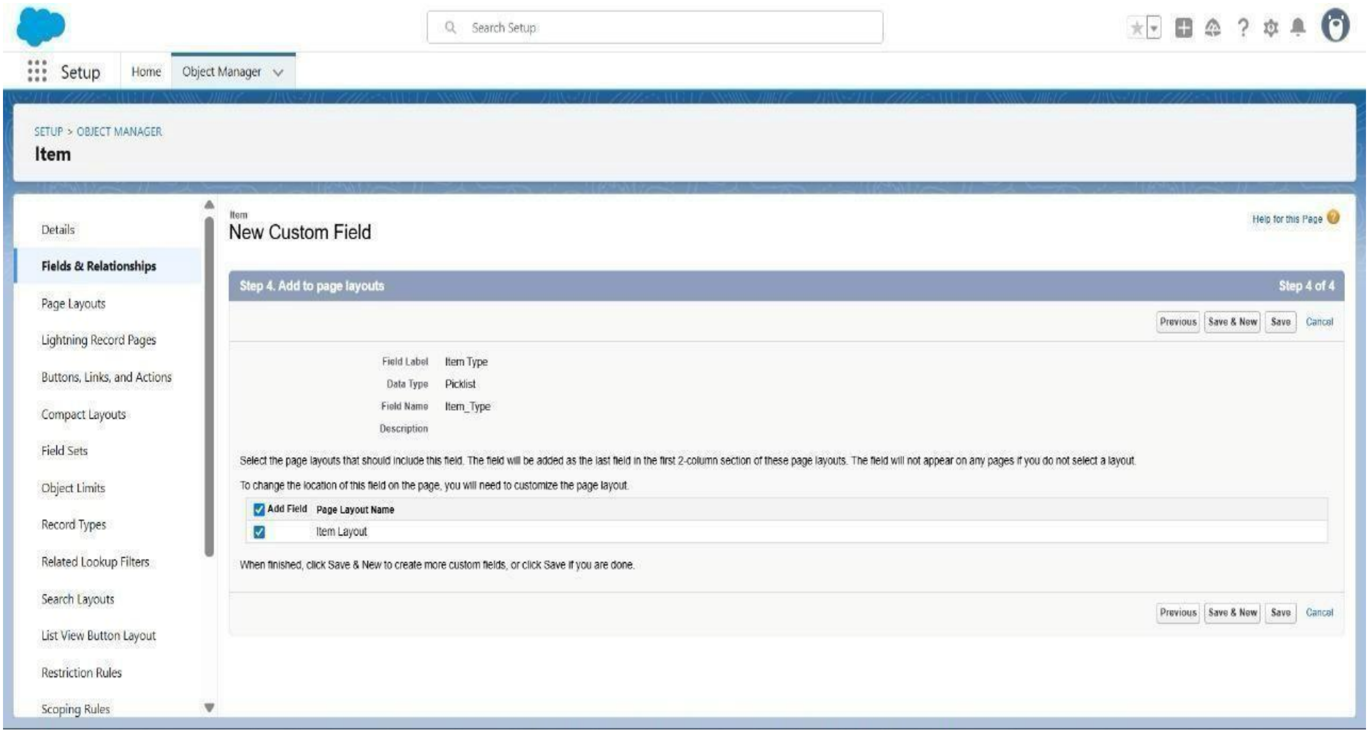
5. Creating the Email field in object Jewel Customer



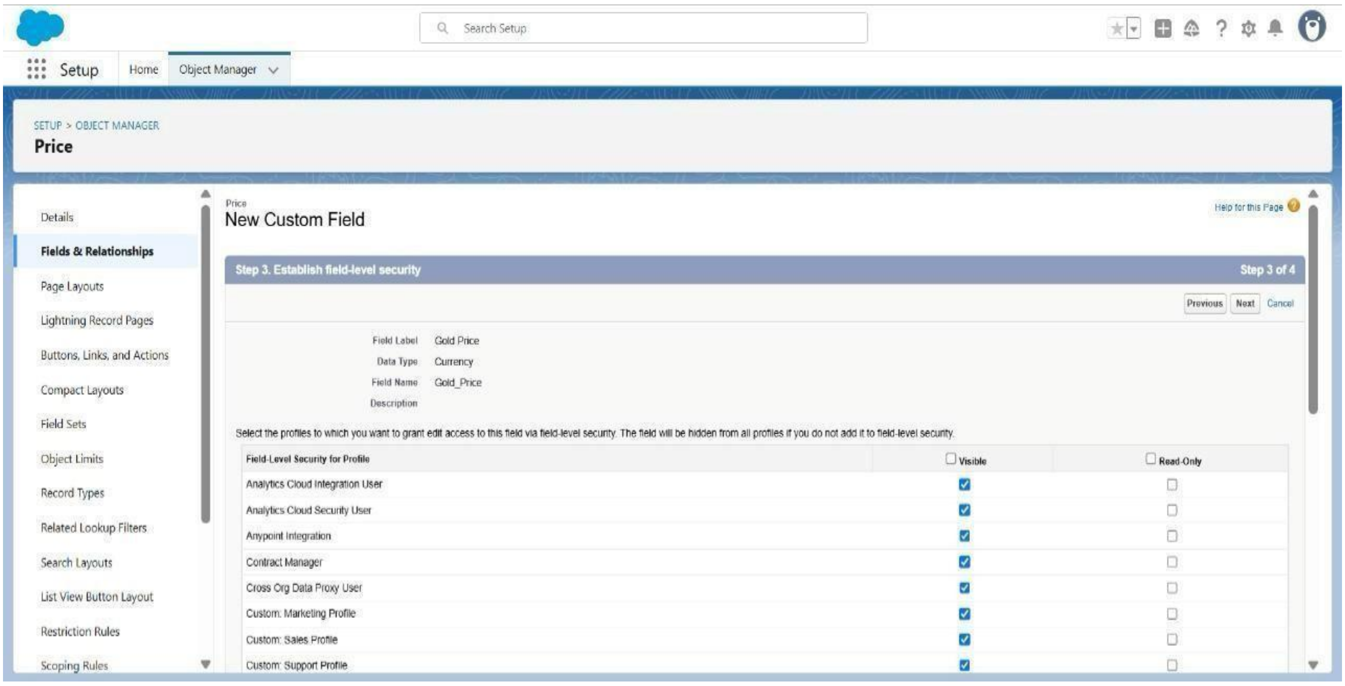
6. Creating the number field in Item object



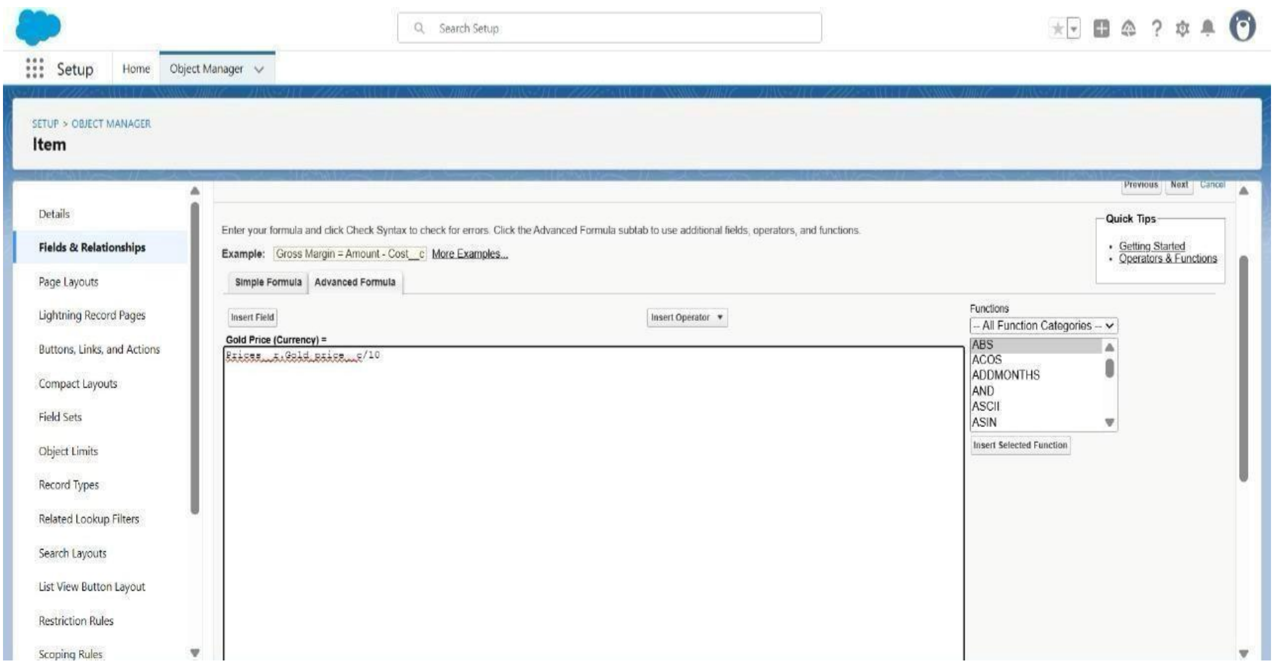
7. Creating Picklist Field in Item Object

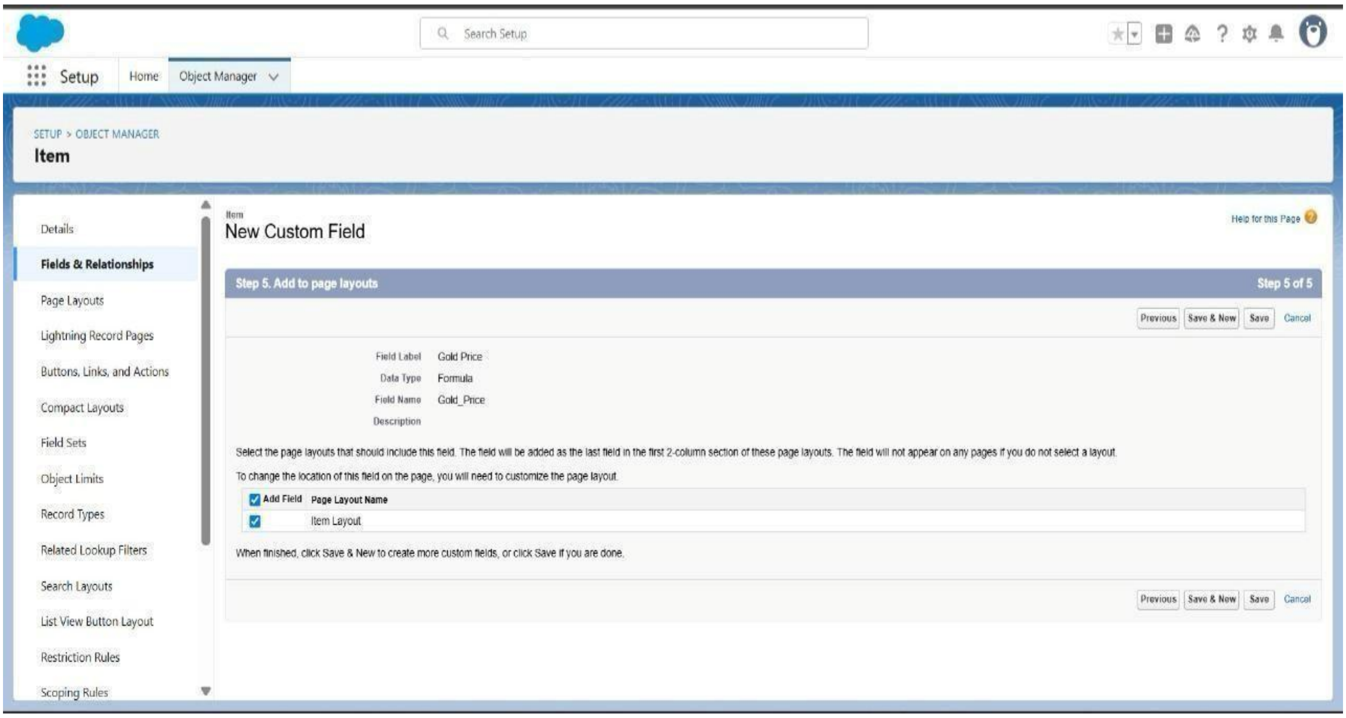


8. Creating Currency Field in Price Object



9. Creating Formula Field(Cross Object) in Item Object

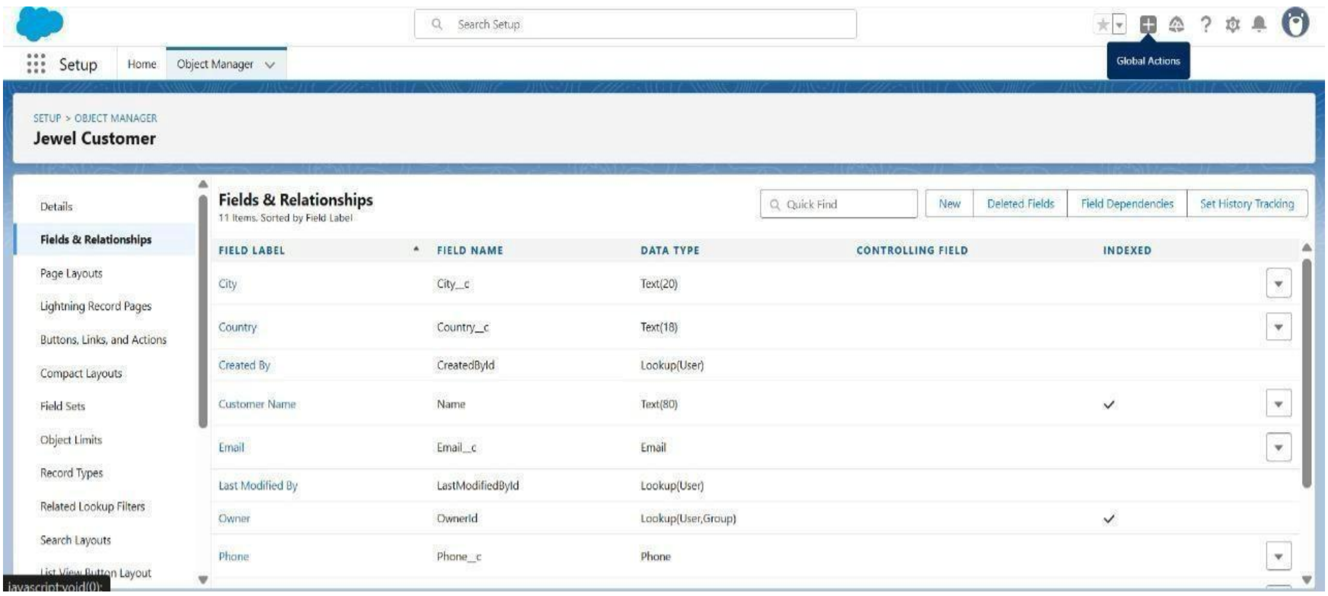




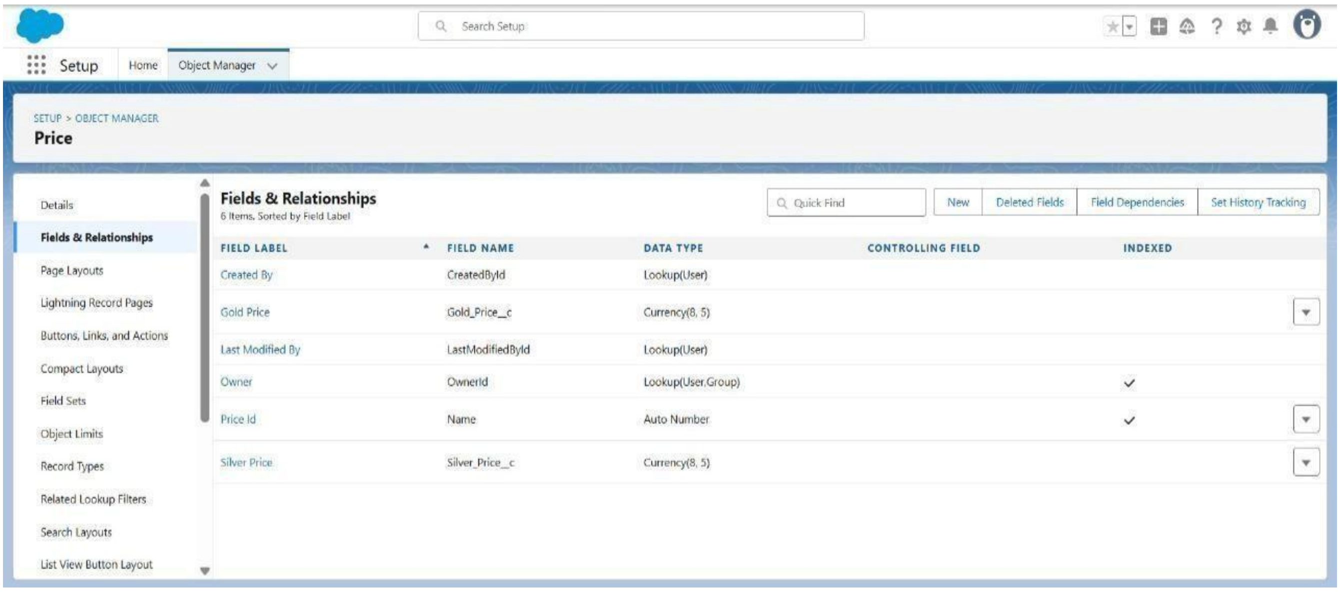
10. Creating Remaining Fields in Objects

Creating remaining fields in the objects

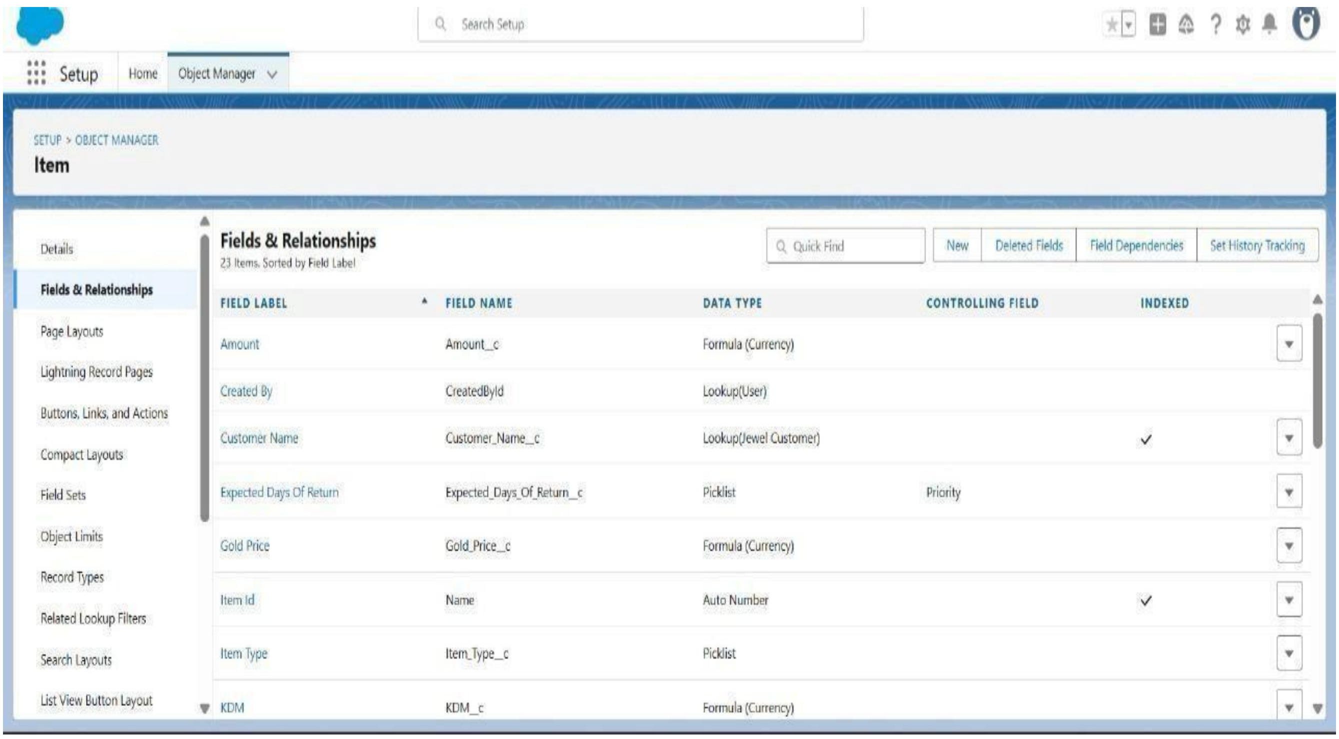
1. Jewel Customer : State, Street, Country, Zip/Postal code



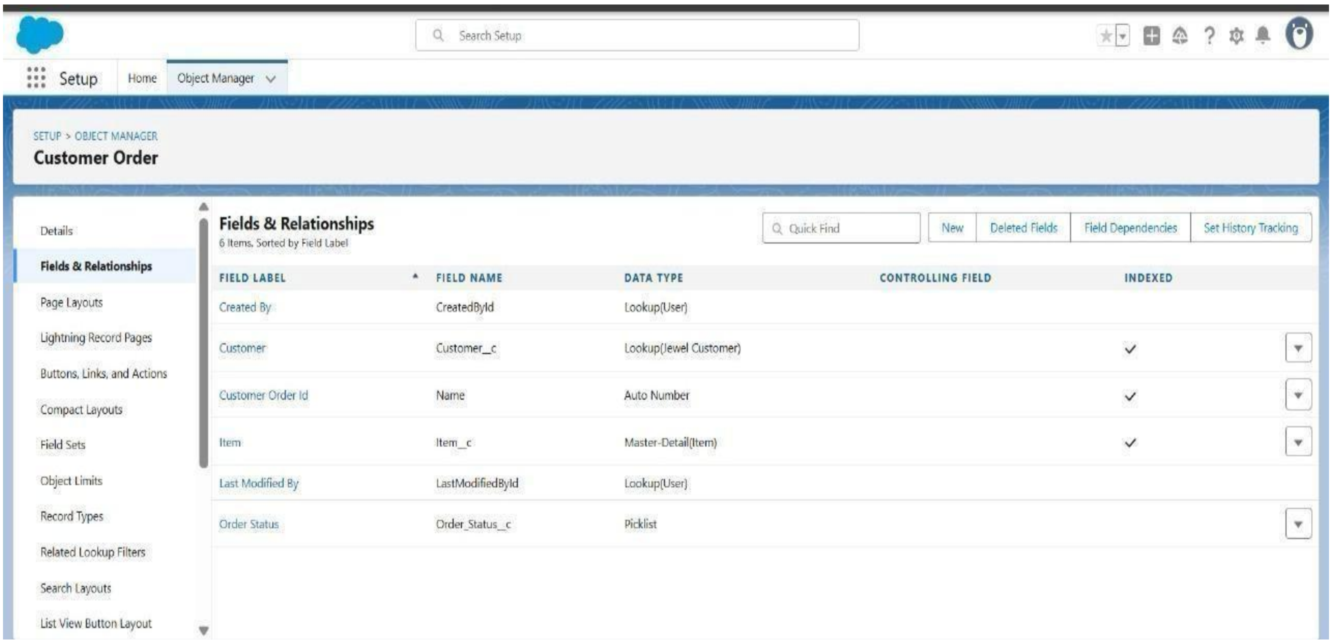
2. Price : Silver Price



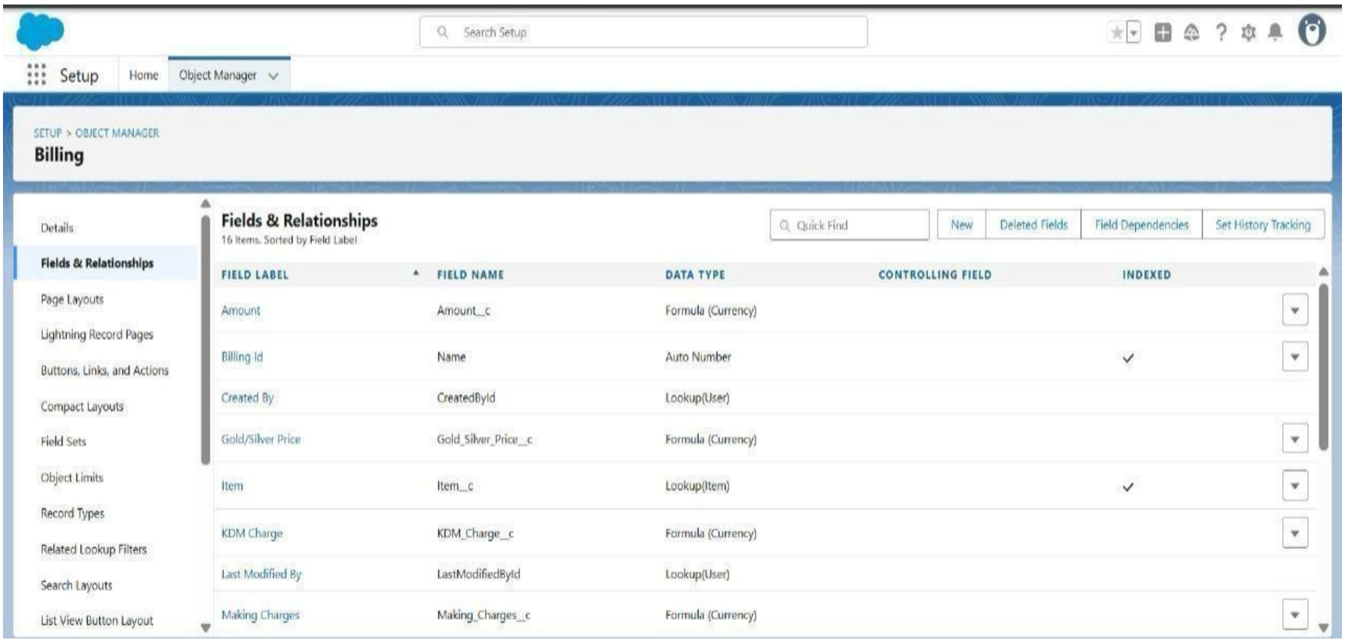
3. Item : Field Label-Customer Name, Ornament, Weight, Stone Weight, Percentage, Stone/Other Price, Expected Days of Return, Priority, Silver Price, Purity Gold Price, Total weights, Amount, KDM, Making Charges.



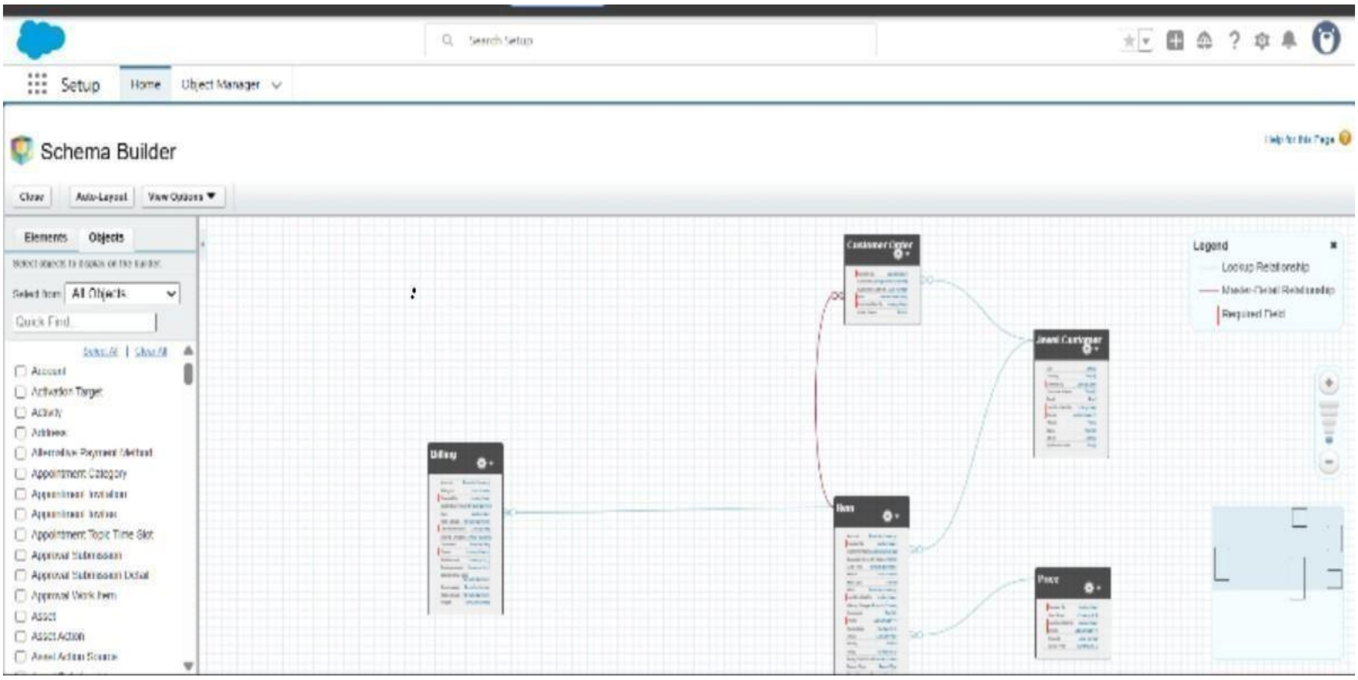
4. Customer Order: Order Status



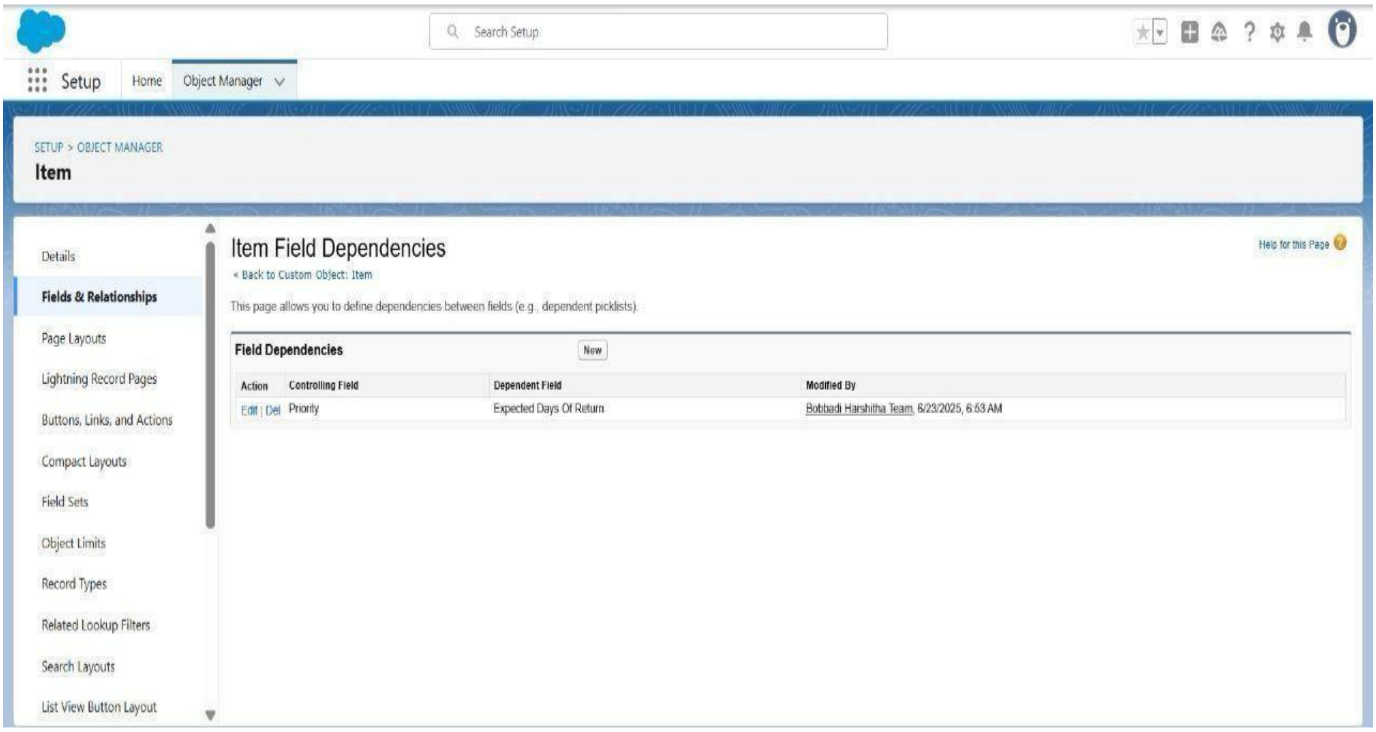
5. Billing: Field Label-Item, Ornament, Stone Weight, Weight, Amount, Gold/Silver Price, KDM Charge, Making Charges,Stone/Other Price, Total Amount.



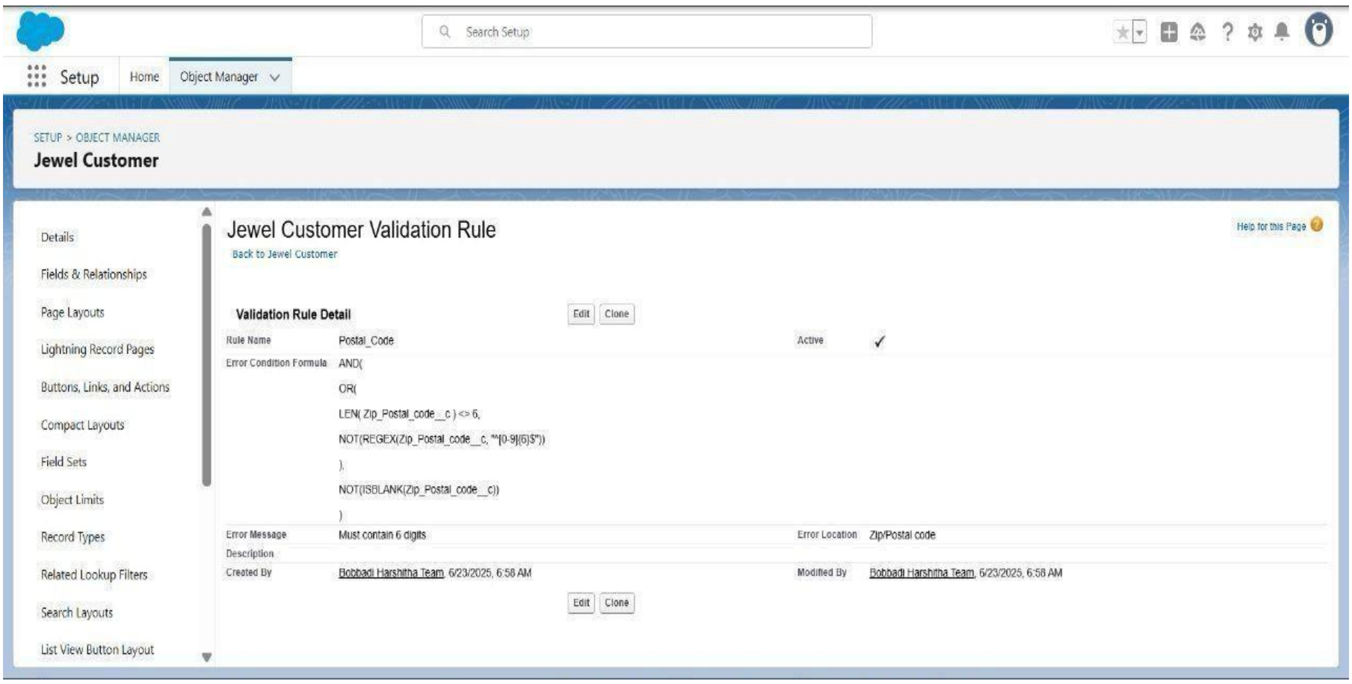
11. Creation of Schema Builder

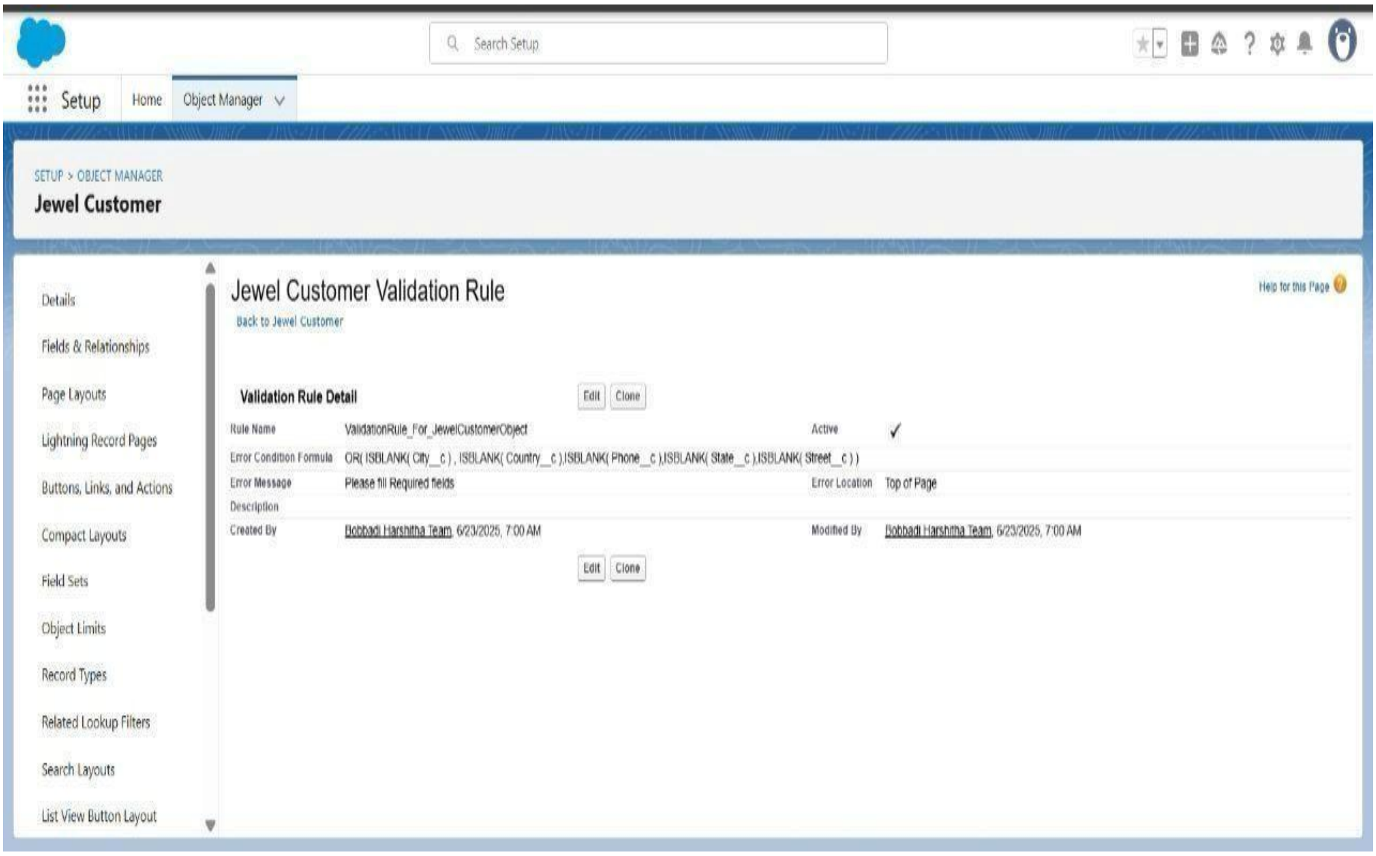


12. Creation of Field Dependencies



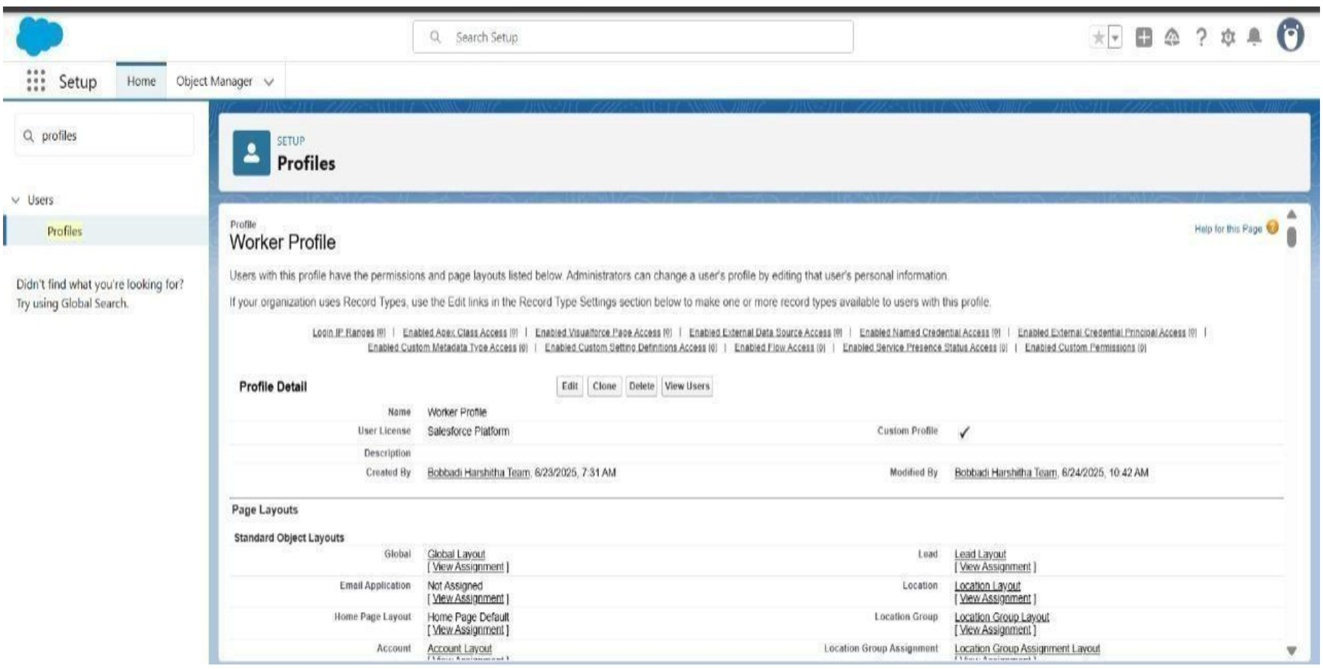
13. Creation of Validation Rules



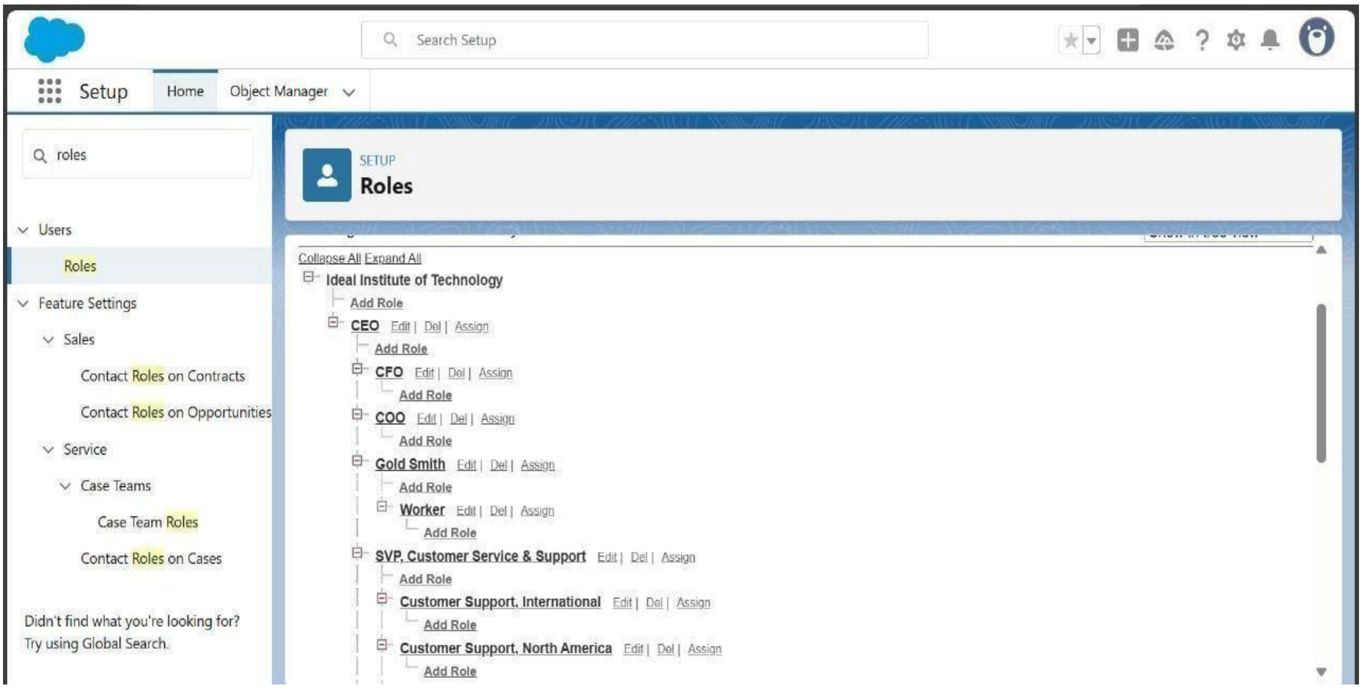


6.6 Creation of Profiles

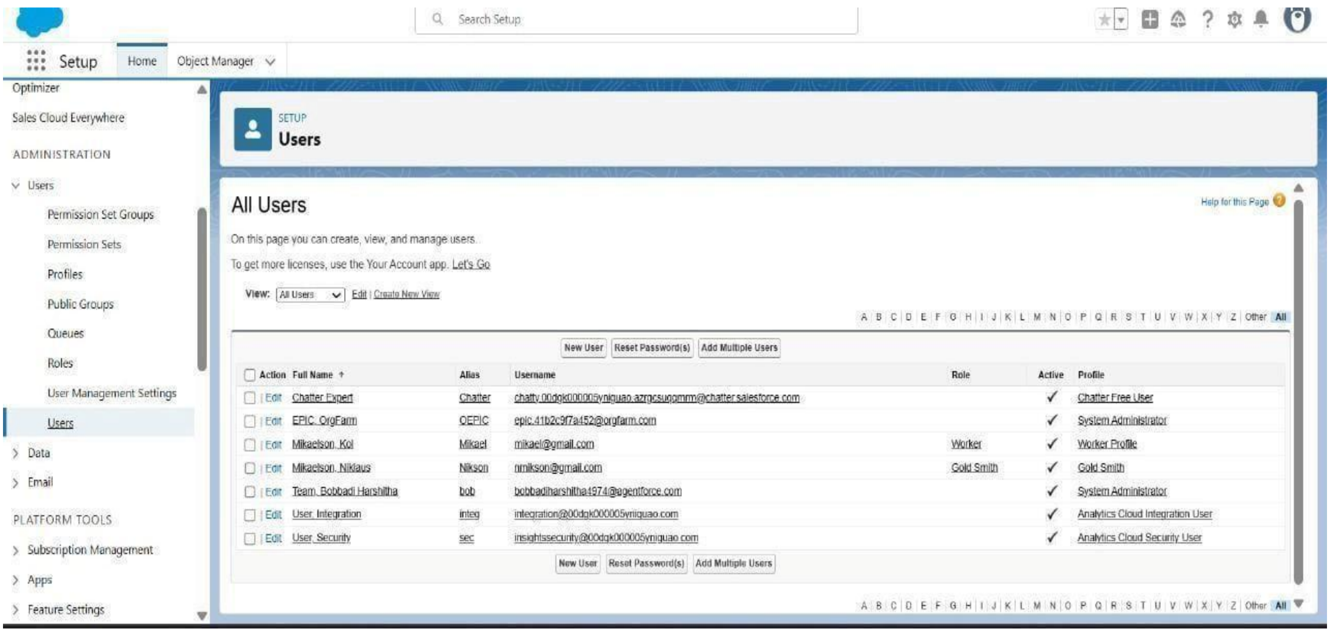
We create the goldsmith profile and the worker profile



6.7 Creation of Roles

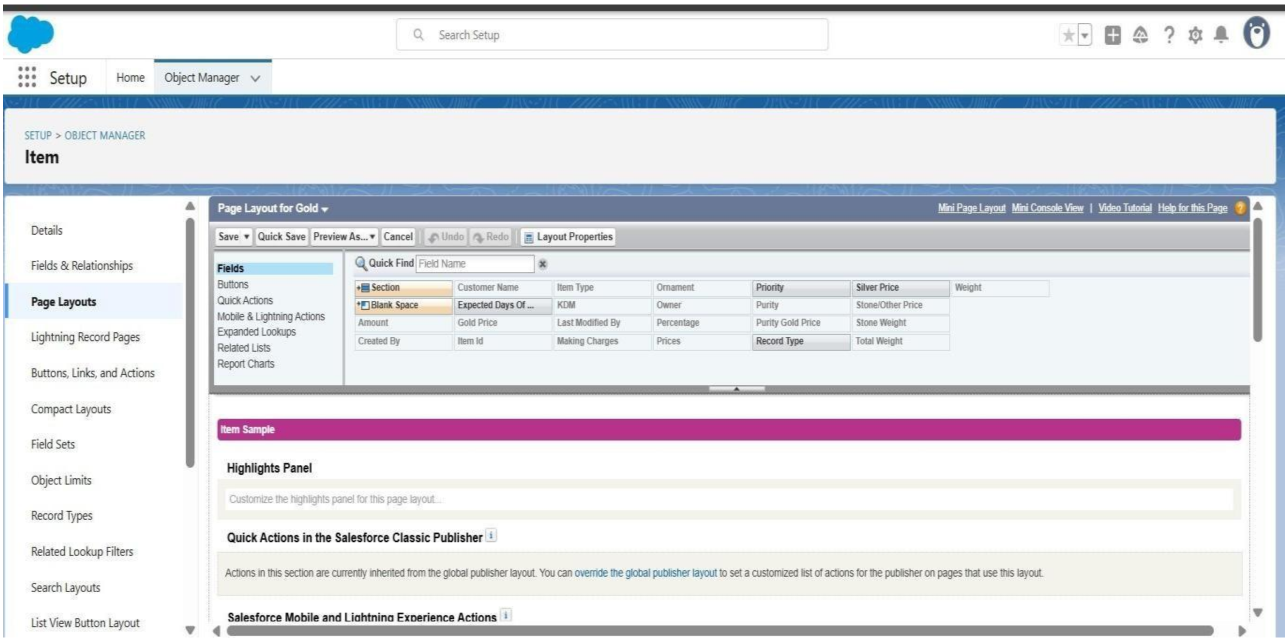


6.8 Creation of Users



6.9 Creation of Page Layouts

We create the page layouts for gold and silver items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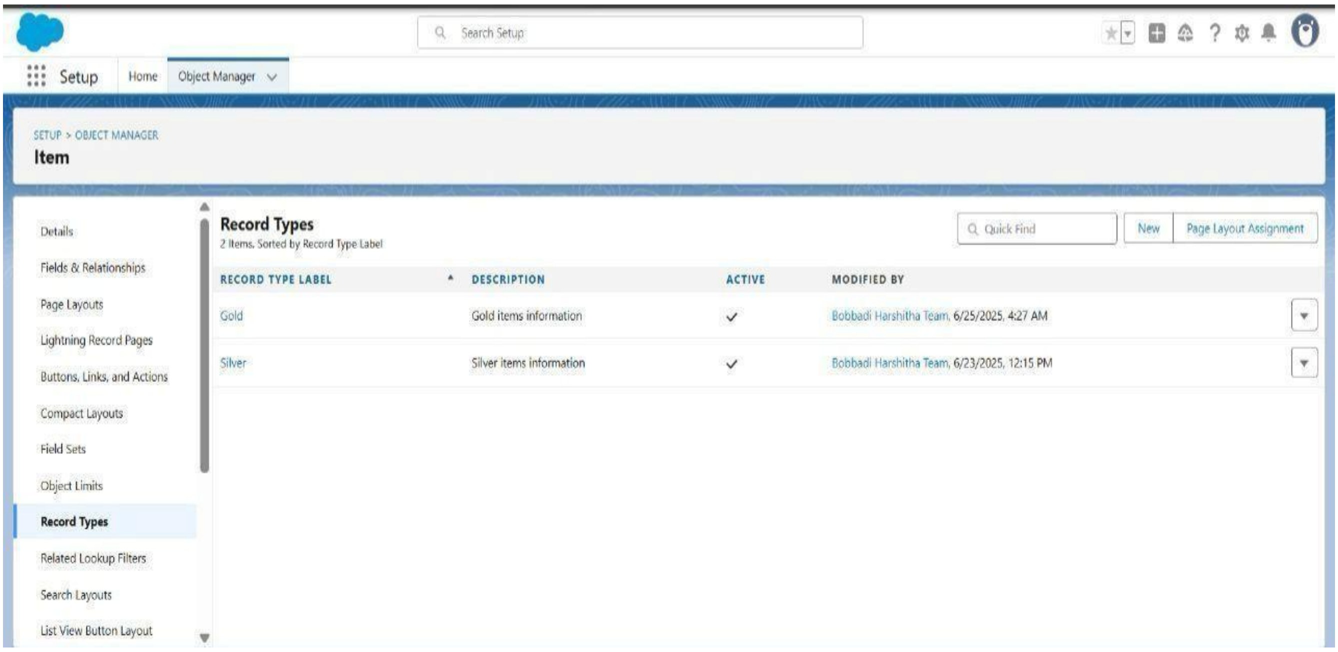
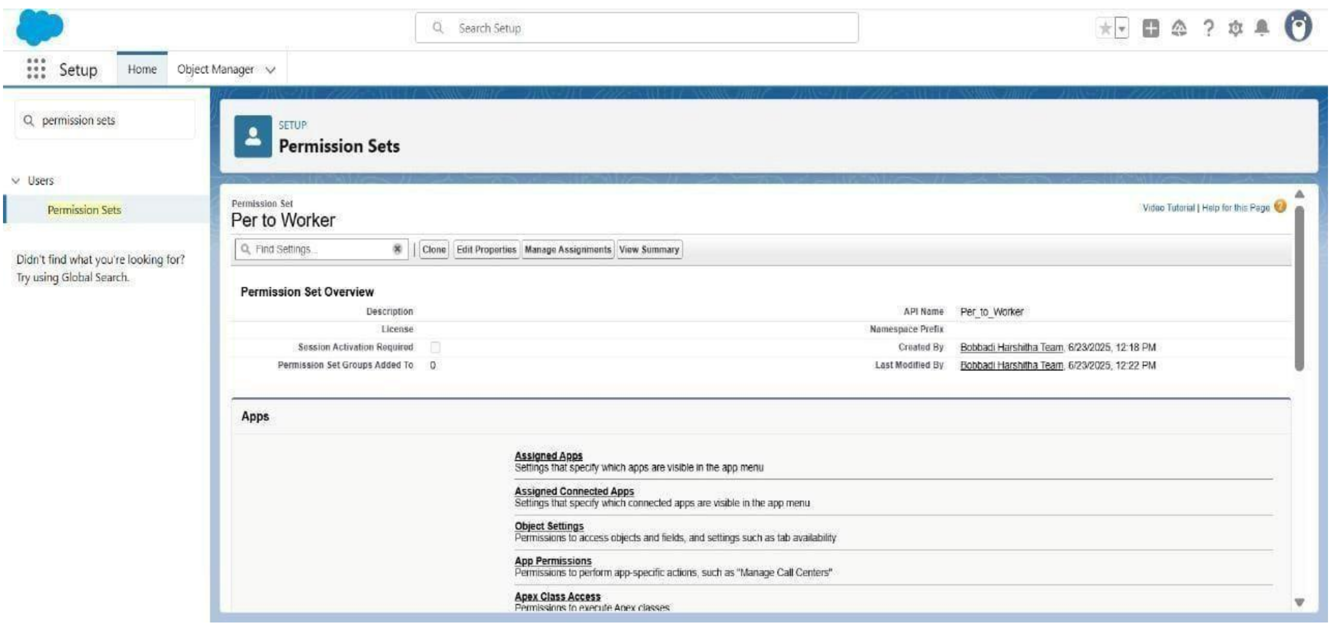
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Page Layout for Gold
Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts
Quick Find
Section
Blank Space
Amount
Created By
Customer Name
Expected Days Of ...
Gold Price
Item Id
Item Type
KDM
Last Modified By
Making Charges
Ornament
Owner
Percentage
Prices
Priority
Purity
Purity Gold Price
Record Type
Silver Price
Stone/Other Price
Stone Weight
Total Weight
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

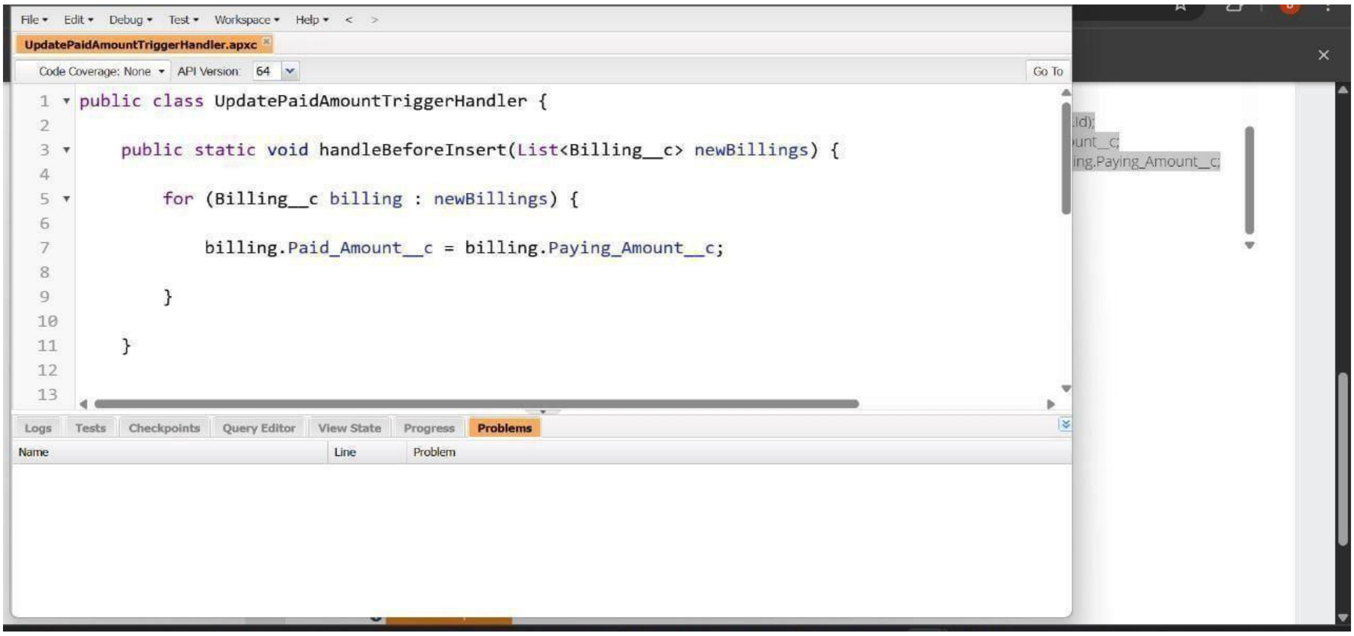
We create the gold an silver records

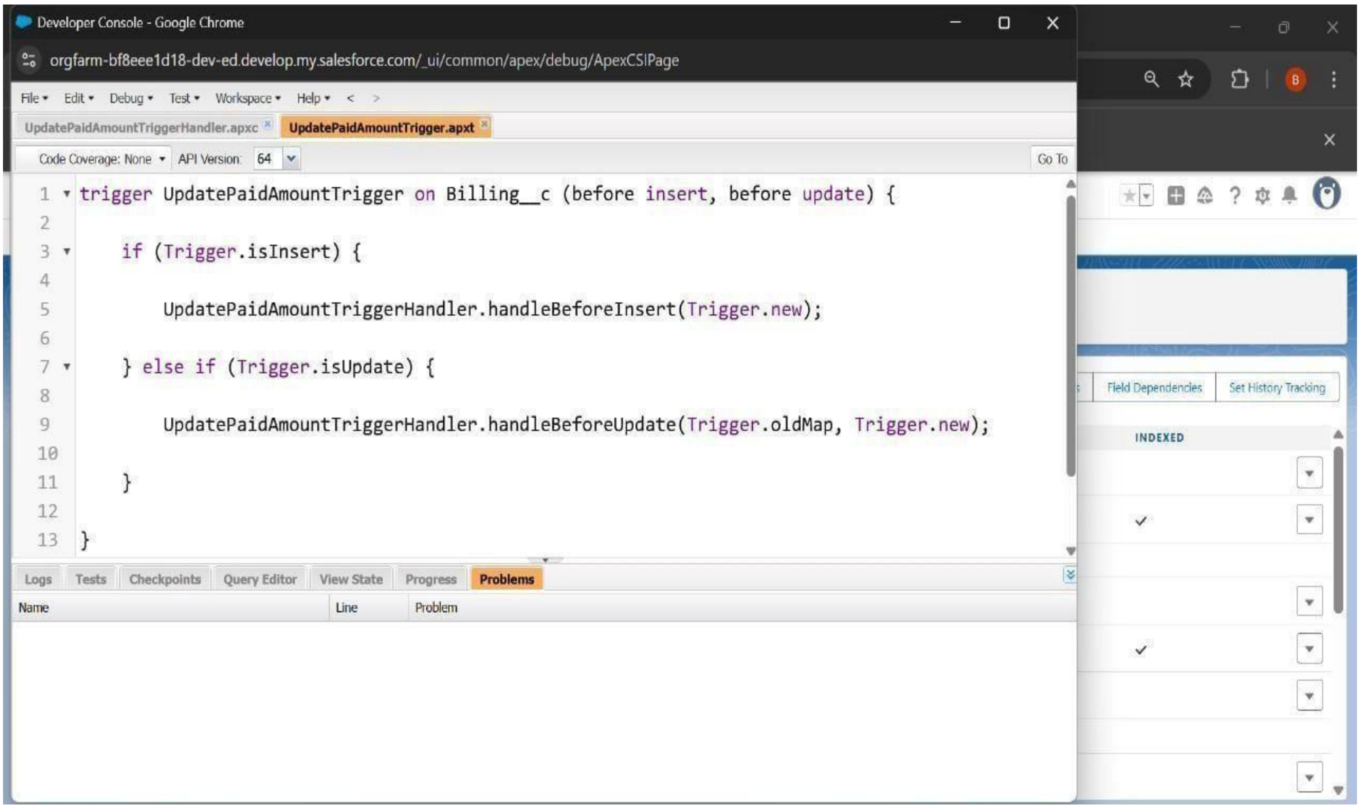


6.10 Creation of Permission Sets



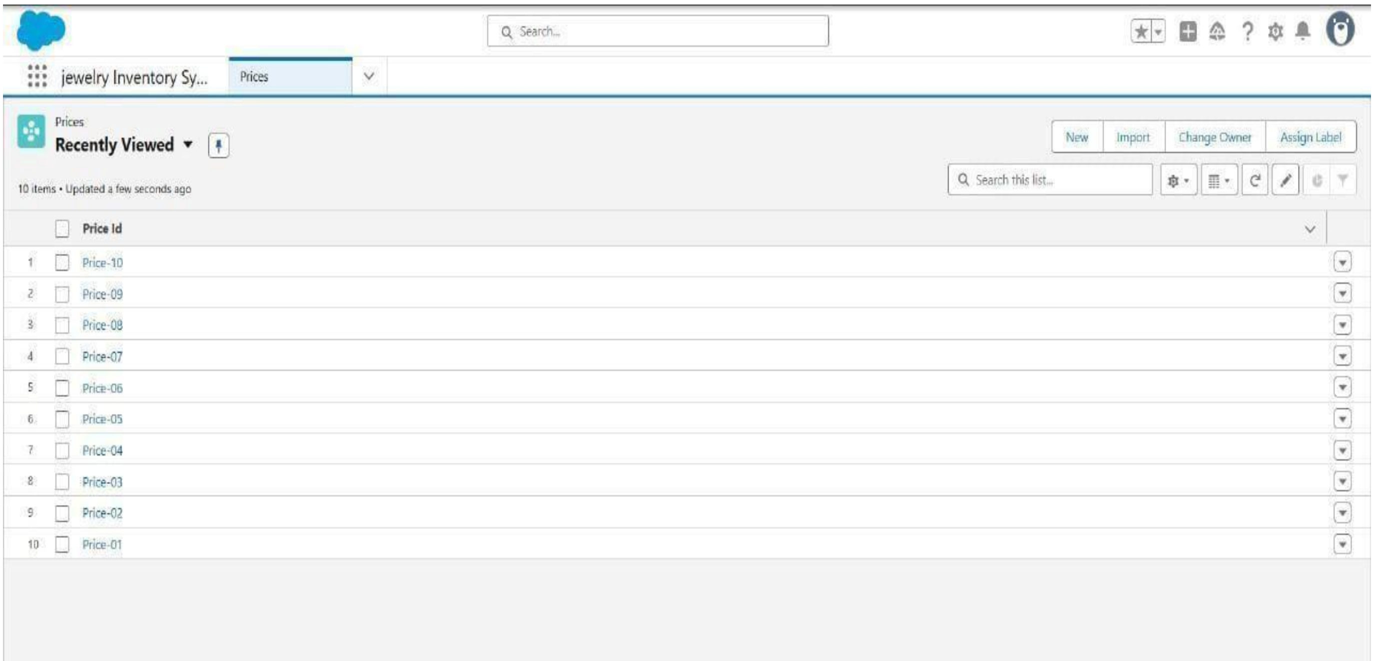
6.11 Creation of Trigger

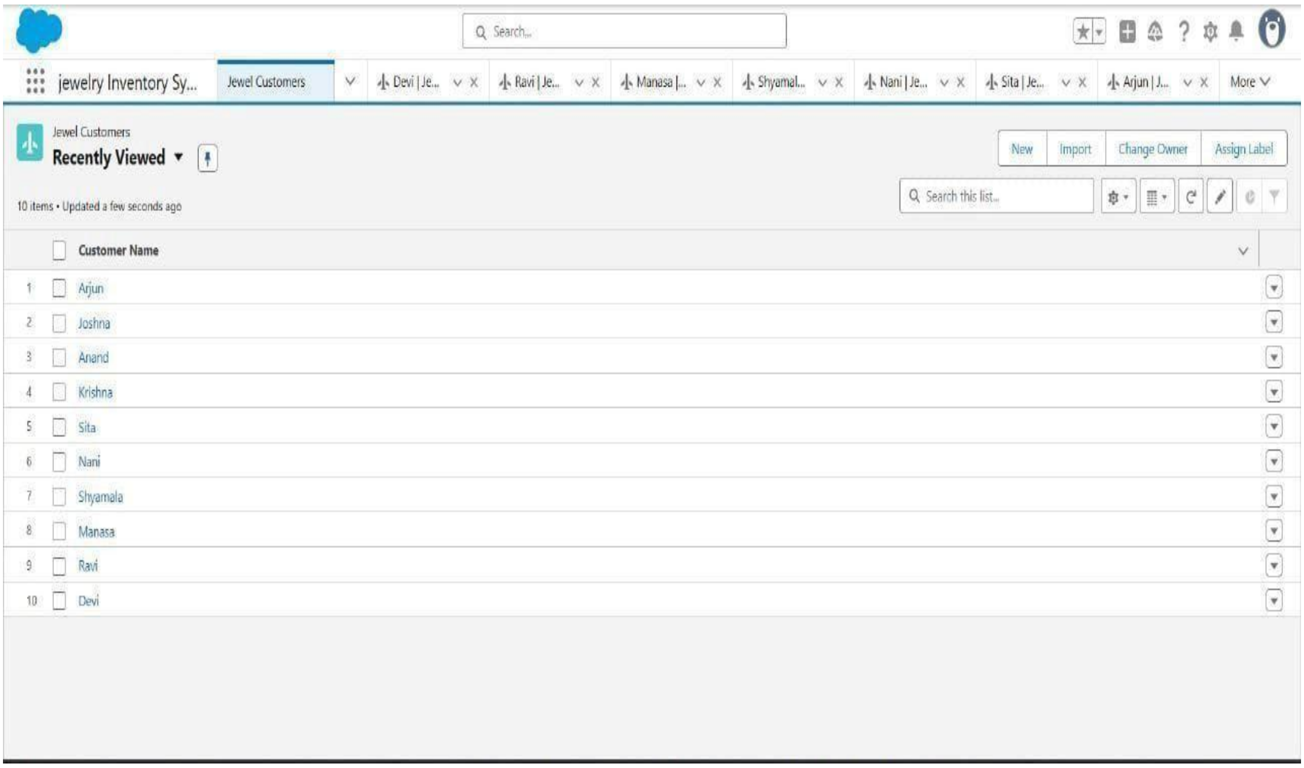




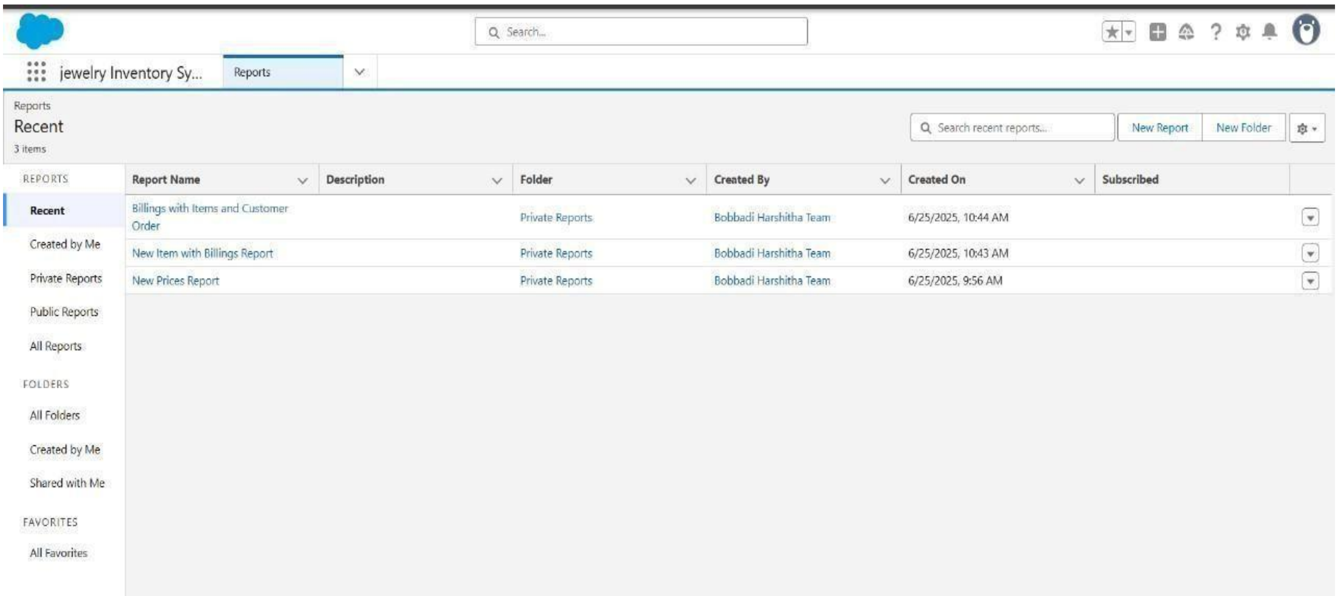
6.12 Creation of User Adoption

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



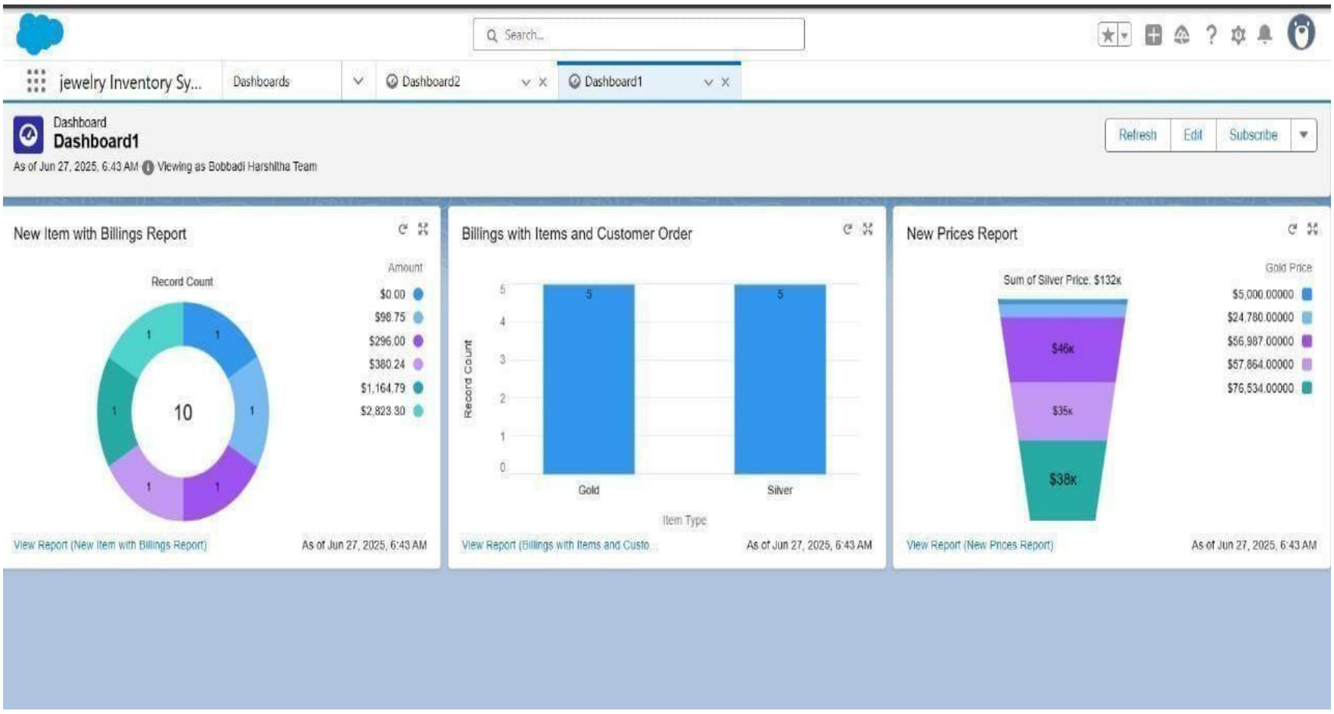


6.13 Creation of Reports

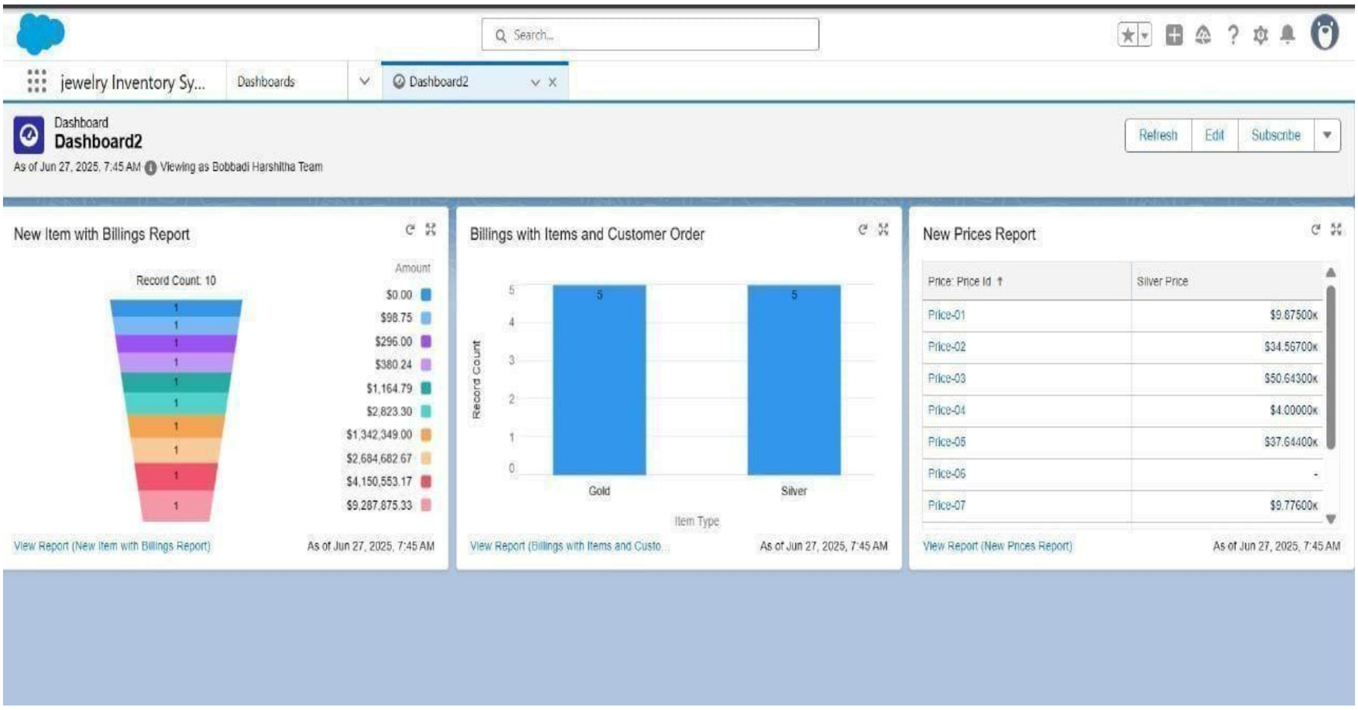


6.14 Creation of Dashboards

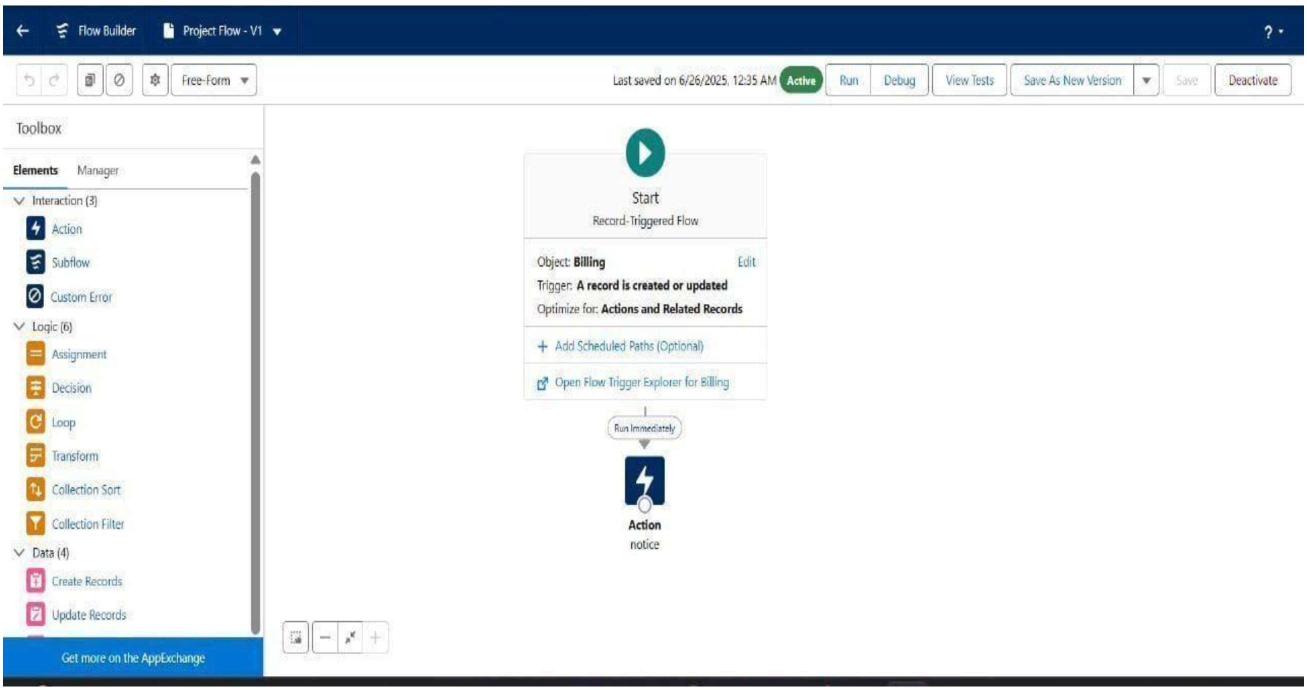
Dashboard 1



Dashboard 2

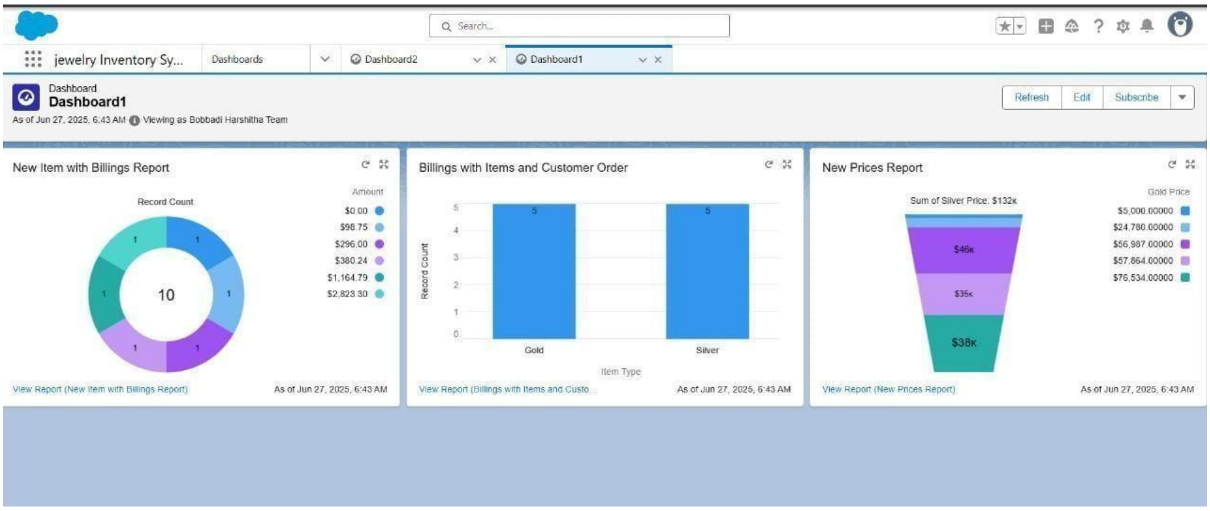


6.15 Creation of Flows



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.

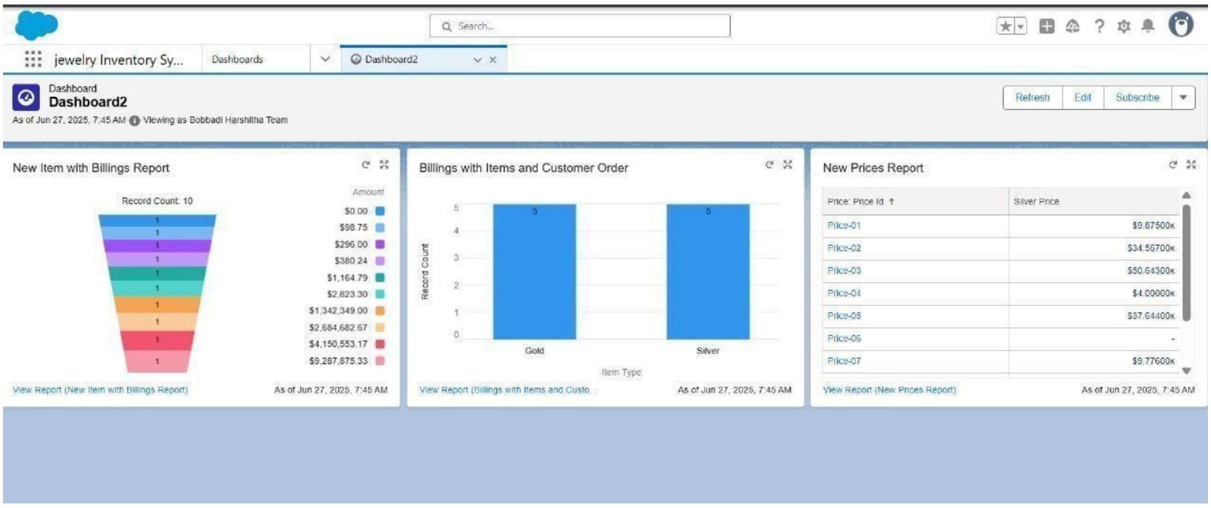
2. Enhance Customer Order Management:

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. Enabels 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:

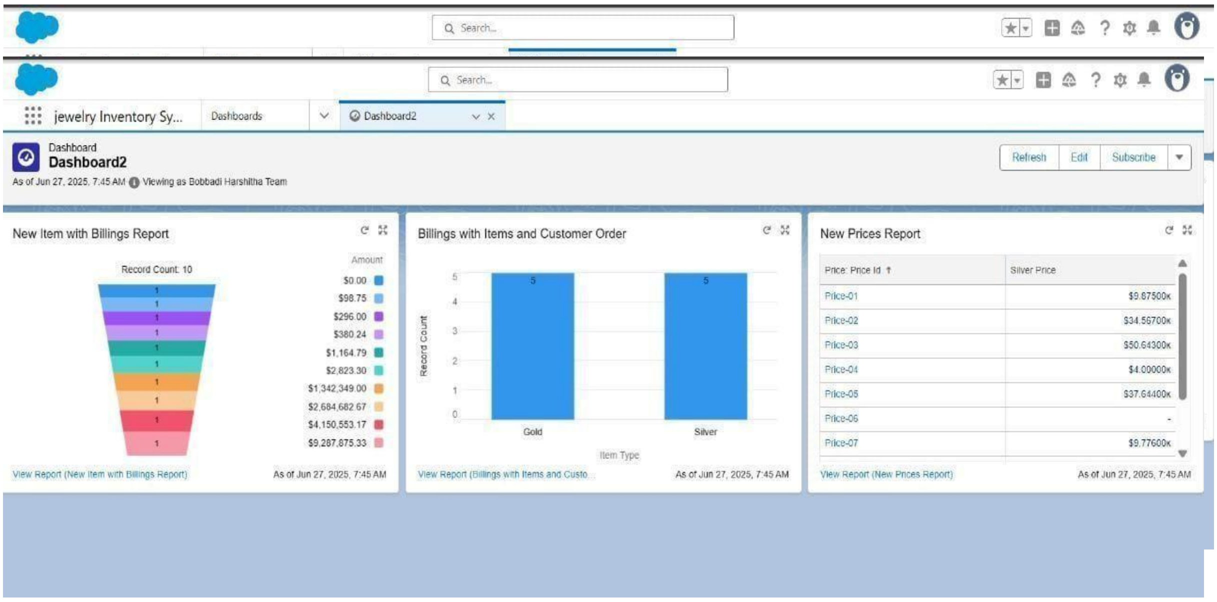
- **Trigger-based validations**
    - Auto-validate if stock is available before creating an invoice
    - Alert for duplicate product entries

C. Approval Workflow Output:

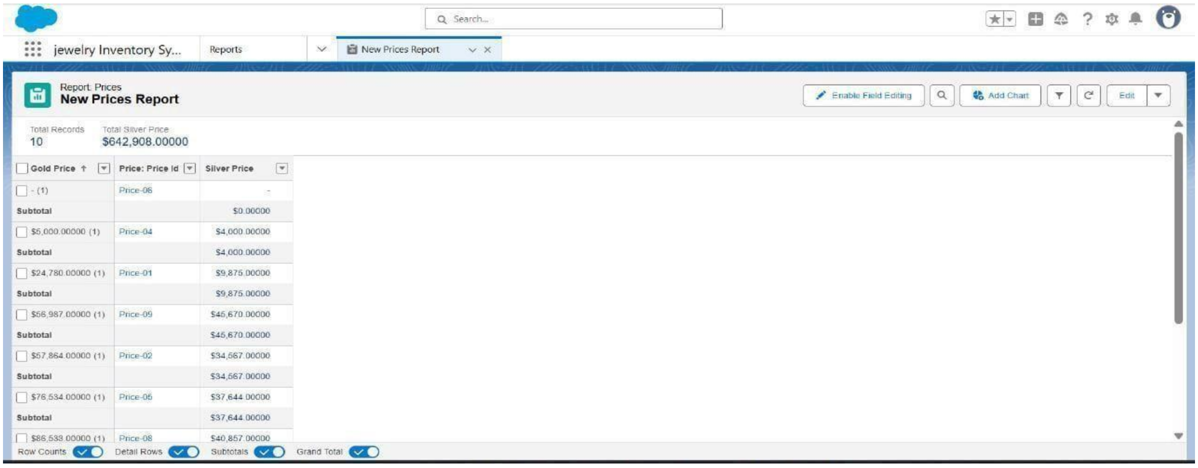
- **Product Addition Requests**
    - New products require manager approval before appearing in inventory
- **Stock Reorder Requests**
    - Approval triggered when reorder level is reached
- **Notifications**

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

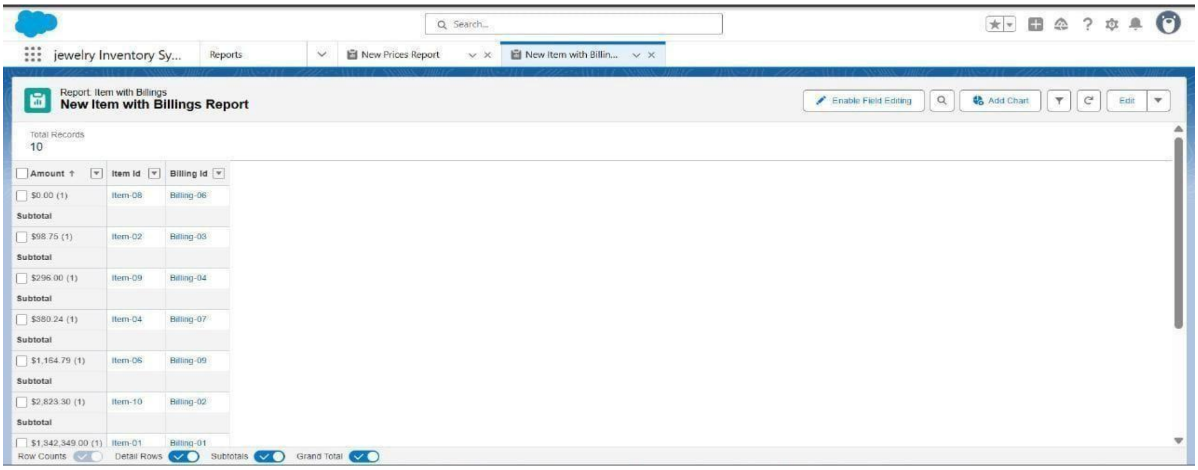
Dashboards:



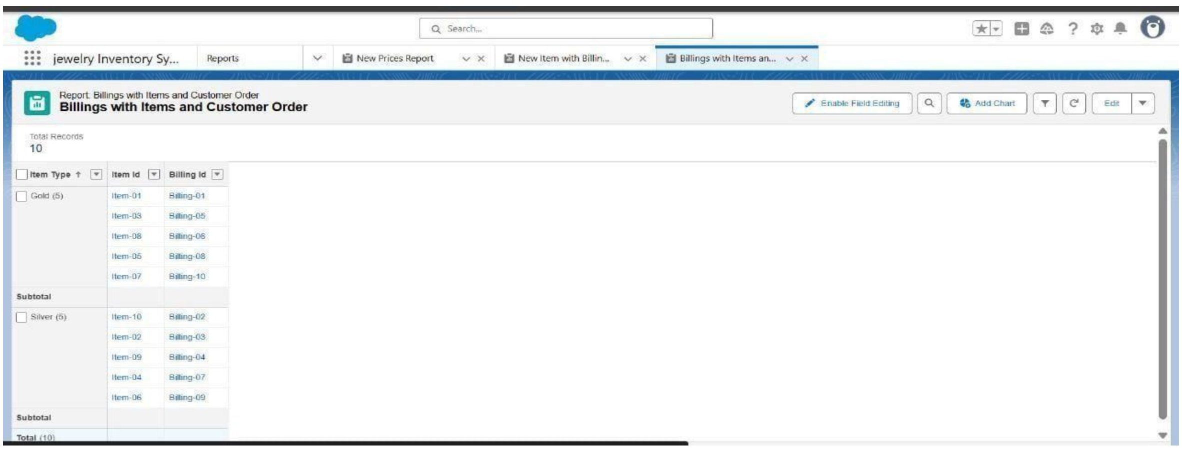
Reports:



jewelry Inventory Sy...
Reports
New Prices Report
Report: Prices
New Prices Report
Enable Field Editing
Add Chart
Edit
Total Records
10
Total Silver Price
$642,908.00000
Gold Price | Price: Price Id | Silver Price
- (1) | Price-06 | -
Subtotal | | $0.00000
$5,000.00000 (1) | Price-04 | $4,000.00000
Subtotal | | $4,000.00000
$24,780.00000 (1) | Price-01 | $9,875.00000
Subtotal | | $9,875.00000
$56,987.00000 (1) | Price-09 | $45,670.00000
Subtotal | | $45,670.00000
$57,864.00000 (1) | Price-02 | $34,567.00000
Subtotal | | $34,567.00000
$76,534.00000 (1) | Price-05 | $37,644.00000
Subtotal | | $37,644.00000
$86,533.00000 (1) | Price-08 | $40,857.00000
Row Counts
Detail Rows
Subtotals
Grand Total

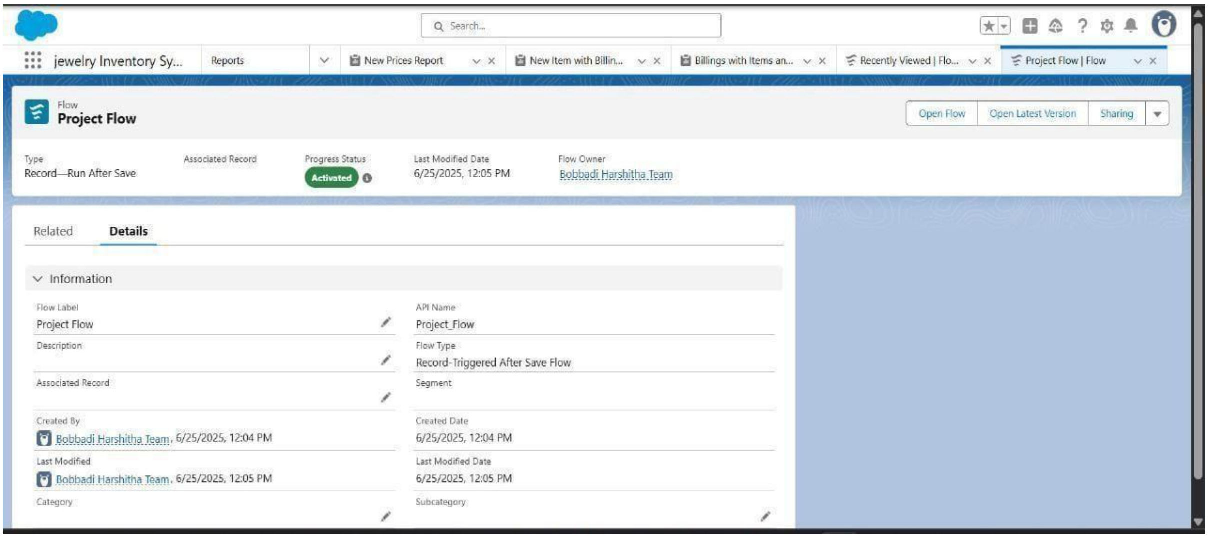


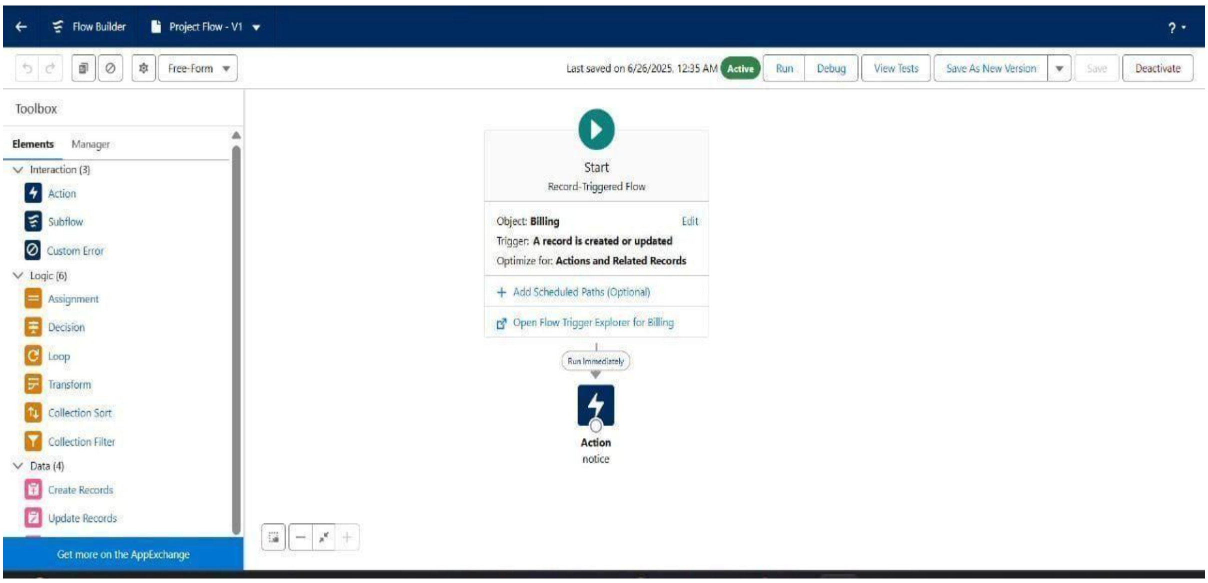
jewelry Inventory Sy...
Reports
New Prices Report
New Item with Billin...
Report: Item with Billings
New Item with Billings Report
Enable Field Editing
Add Chart
Edit
Total Records
10
Amount | Item Id | Billing Id
$0.00 (1) | Item-08 | Billing-06
Subtotal
$98.75 (1) | Item-02 | Billing-03
Subtotal
$296.00 (1) | Item-09 | Billing-04
Subtotal
$380.24 (1) | Item-04 | Billing-07
Subtotal
$1,164.79 (1) | Item-06 | Billing-09
Subtotal
$2,823.30 (1) | Item-10 | Billing-02
Subtotal
$1,342,349.00 (1) | Item-01 | Billing-01
Row Counts
Detail Rows
Subtotals
Grand Total



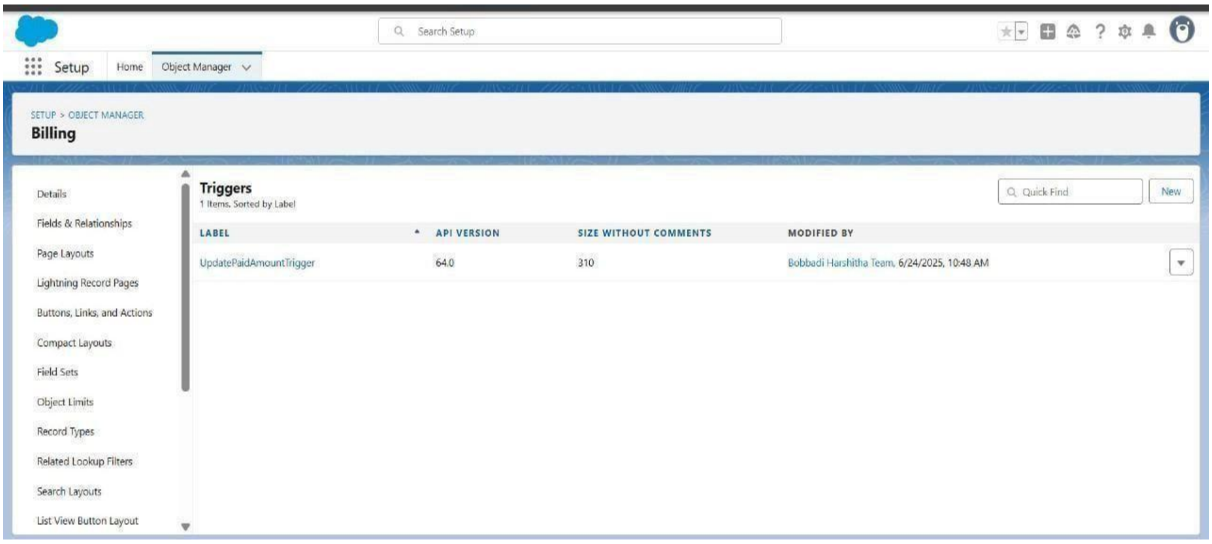
jewelry Inventory Sy...
Reports
New Prices Report
New Item with Billin...
Billings with Items an...
Report: Billings with Items and Customer Order
Billings with Items and Customer Order
Enable Field Editing
Add Chart
Edit
Total Records
10
Item Type | Item Id | Billing Id
Gold (5) | Item-01 | Billing-01
Item-03 | Billing-05
Item-08 | Billing-06
Item-05 | Billing-08
Item-07 | Billing-10
Subtotal
Silver (5) | Item-10 | Billing-02
Item-02 | Billing-03
Item-09 | Billing-04
Item-04 | Billing-07
Item-06 | Billing-09
Subtotal
Total (10)

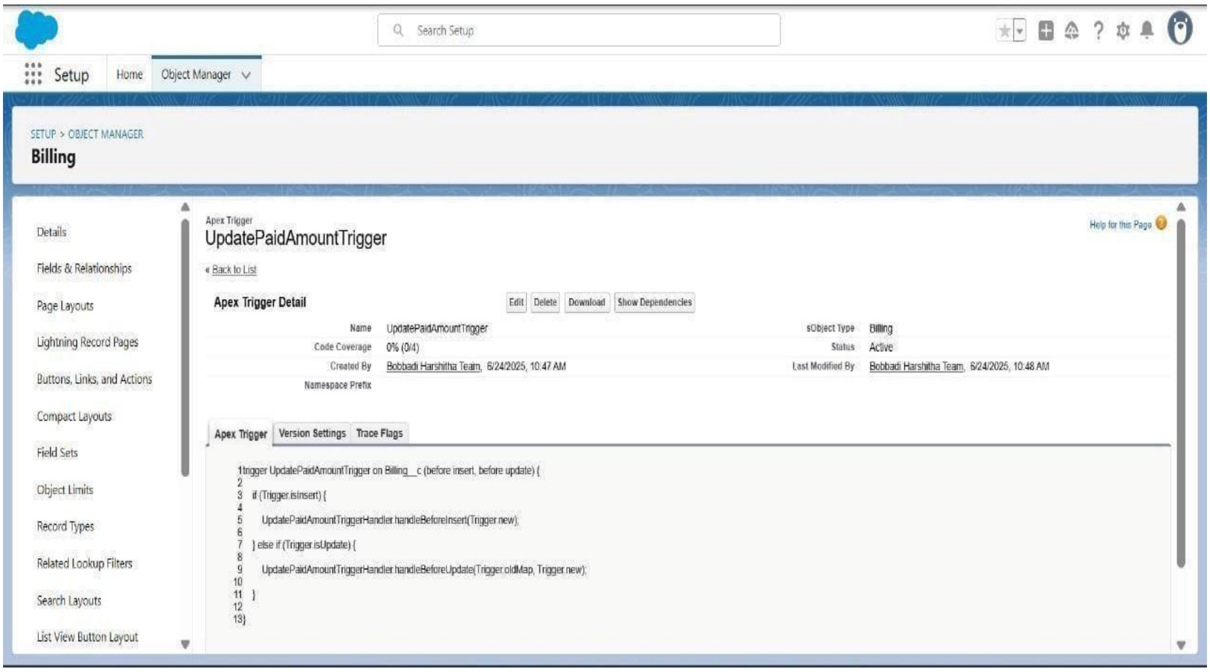
Flows:





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.