

## **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](mailto:nellai2810@gmail.com)

TEAM MEMBER : MOHAMMED AMJATH ILYAS M

EMAIL : [mohammedamjath7862@gmail.com](mailto:mohammedamjath7862@gmail.com)

TEAM MEMBER : SREE SUDHARSHAN V T

EMAIL : [sudharshansri496@gmail.com](mailto:sudharshansri496@gmail.com)

TEAM MEMBER : RATHNA PRAKASH S

EMAIL : [prakashsrithar007@gmail.com](mailto: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.

### **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, Use Case 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](https://developer.salesforce.com/signup)

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

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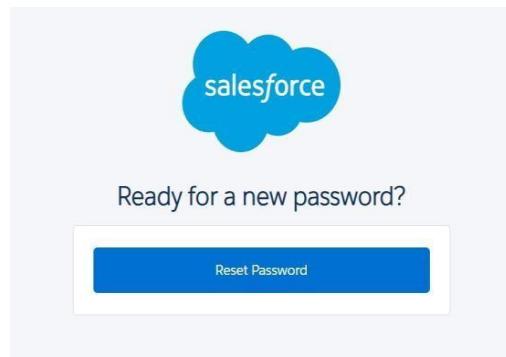
Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

I agree to the [Main Services 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.

We value your privacy. To learn more, visit our [Privacy Statement](#).

I'm not a robot  reCAPTCHA  
Privacy + Terms

**Sign Me Up**





## 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

In what city were you born?

\* 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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right says 'Search Setup'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Jewel Customer'. On the left, a sidebar lists various configuration 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 'Details' tab is selected. The main content area shows the 'Details' section for the 'Jewel Customer' object. It includes fields for Description, API Name (set to 'Jewel\_Customer\_\_c'), Singular Label ('Jewel Customer'), Plural Label ('Jewel Customers'), and several checkboxes for reporting and tracking. At the bottom right are 'Edit' and 'Delete' buttons.

## 2. Item

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right says 'Search Setup'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Item'. On the left, a sidebar lists various configuration 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 'Details' tab is selected. The main content area shows the 'Details' section for the 'Item' object. It includes fields for Description, API Name (set to 'Item\_\_c'), Singular Label ('Item'), and Plural Label ('Items'). Several checkboxes are checked for reporting and tracking. At the bottom right are 'Edit' and 'Delete' buttons.

### 3. Customer Order

The screenshot shows the Salesforce Setup interface for the 'Customer Order' object. The left sidebar lists various configuration options: 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 'Details' section shows the following fields:

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
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At the top right, there are 'Edit' and 'Delete' buttons.

### 4. Price

The screenshot shows the Salesforce Setup interface for the 'Price' object. The left sidebar lists various configuration options: 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 'Details' section shows the following fields:

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
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At the top right, there are 'Edit' and 'Delete' buttons.

## 5. Billing

The screenshot shows the Salesforce Object Manager interface for the 'Billing' object. The left sidebar lists various configuration tabs: 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 'Details' tab is selected. The right pane displays the object's details, including its API name 'Billing\_c', which is marked as 'Custom'. Other details include Singular Label 'Billing', Plural Label 'Billings', and Help Settings pointing to 'Standard salesforce.com Help Window'. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar.

## 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 page under the 'User Interface' section, specifically the 'Tabs' tab. A search bar at the top left shows 'tabs'. The main area displays a 'Custom Object Tab' for 'Jewel Customers'. The 'Custom Tab Definition Detail' table shows the following information:

Tab Label	Jewel Customers
Object	Jewel Customer
Description	
Created By	<a href="#">Bobbadi Harshitha Team</a> 6/22/2025, 8:13 AM
Modified By	<a href="#">Bobbadi Harshitha Team</a> 6/22/2025, 8:13 AM
Tab Style	<a href="#">Airplane</a>
Splash Page Custom Link	

## 2. Item

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right says 'Search Setup'. Below the navigation is a sidebar with 'User Interface' expanded, showing 'Rename Tabs and Labels' and 'Tabs' selected. The main content area has a title 'Custom Object Tab Items'. It displays a 'Custom Tab Definition Detail' table with the following data:

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

A message at the bottom left says 'Didnt find what you're looking for? Try using Global Search.'

## 3. Customer Order

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right says 'Search Setup'. Below the navigation is a sidebar with 'User Interface' expanded, showing 'Rename Tabs and Labels' and 'Tabs' selected. The main content area has a title 'Custom Object Tab Customer Orders'. It displays a 'Custom Tab Definition Detail' table with the following data:

Tab Label	Customer Orders	Tab Style	None
Object	Customer Order	Splash Page	Custom Link
Description			
Created By	Bobbadli Harshitha Team	Created On	6/22/2025, 8:19 AM
Modified By	Bobbadli Harshitha Team	Modified On	6/22/2025, 8:19 AM

A message at the bottom left says 'Didnt find what you're looking for? Try using Global Search.'

## 4. Price

The screenshot shows the Salesforce Setup interface. The left sidebar has 'User Interface' expanded, with 'Rename Tabs and Labels' selected. The main content area shows a 'Custom Object Tab' titled 'Prices'. The tab definition details are as follows:

Tab Label	Prices	Object	Price	Tab Style	Splash Page Custom Link
Description					
Created By	Bobbadi Harshitha Team	6/22/2025, 8:20 AM	Modified By	Bobbadi Harshitha Team	6/22/2025, 8:20 AM

## 5. Billing

So we get the required all custom tabs as below

**Custom Tabs**

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Action	Label	Tab Style	Description
Edit   Del	Billings	Boat	
Edit   Del	Customer Orders	Bell	
Edit   Del	Items	Alarm clock	
Edit   Del	Jewel Customers	Airplane	
Edit   Del	Prices	Fan	

**Web Tabs**

No Web Tabs have been defined

## 6.4 Creation of Lightning App

**App Name:** Jewelry Inventory System

**App Settings**

**App Details & Branding**

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

**App Details**

\*App Name: jewelry Inventory System

\*Developer Name: jewelry\_Inventory\_System

Description: Elevate your look with elegance

**App Branding**

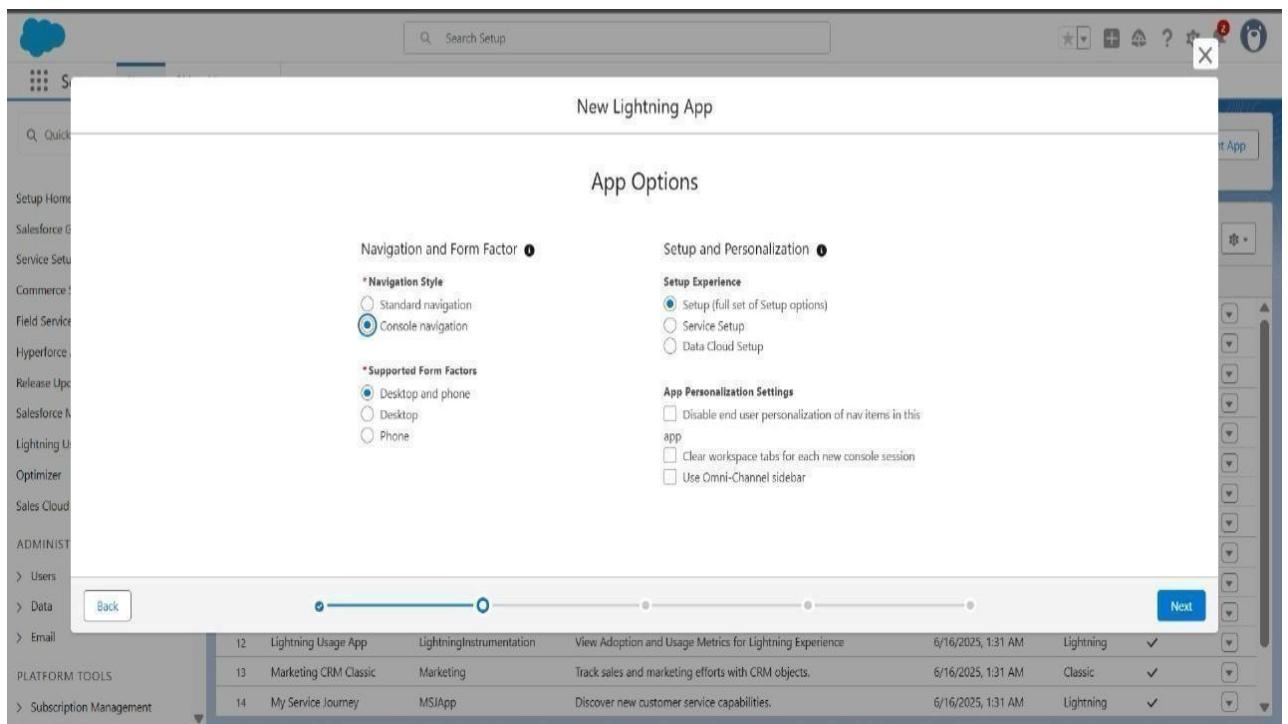
Image:  Upload

Primary Color Hex Value: #0070D2

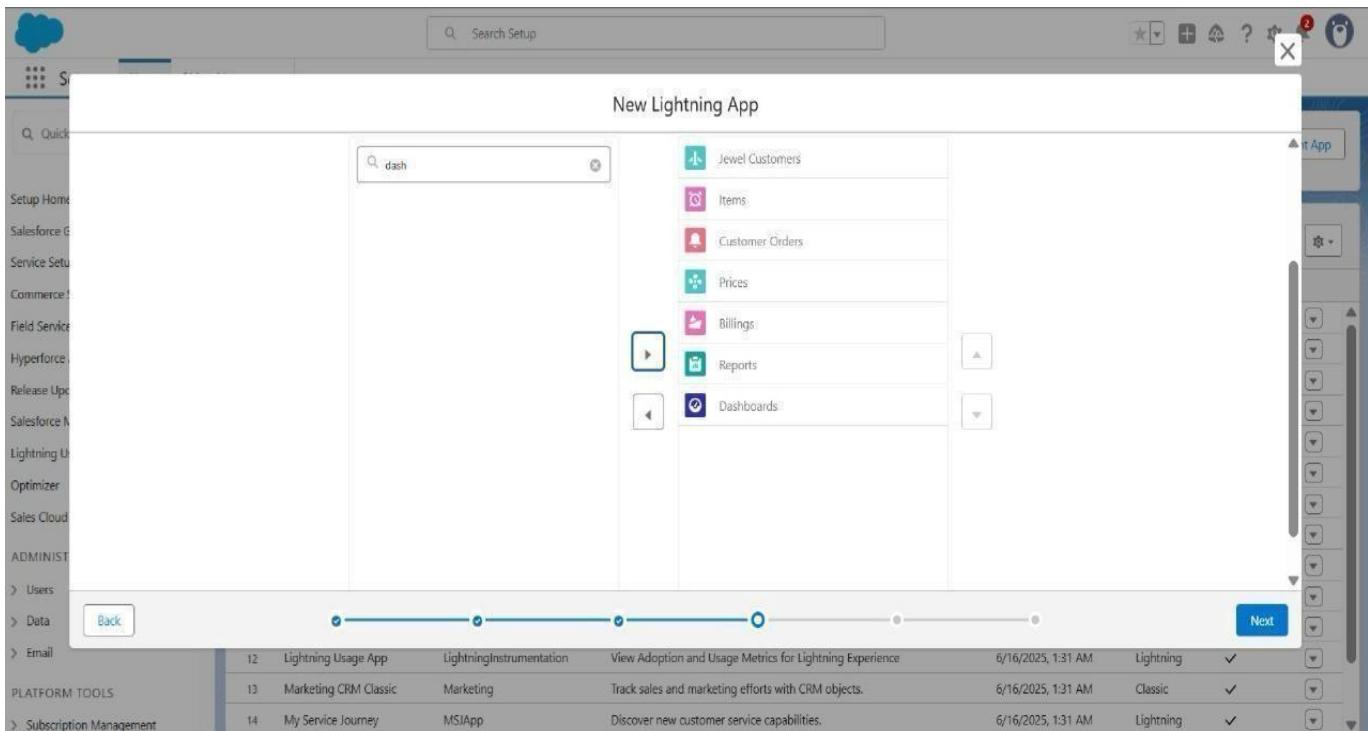
Org Theme Options:  Use the app's image and color instead of the org's custom theme

**App Launcher Preview**

jI jewelry Inventory System  
Elevate your look with elegance



## 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. The left sidebar lists various object settings like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "Customer Order New Relationship". Step 3 is active, titled "Enter the label and name for the lookup field". It shows fields for "Field Label" (Customer), "Field Name" (Customer), "Description", and "Help Text". Below these, under "Child Relationship Name", it shows "Customer\_Orders". Under "Required", there are two options: "Always require a value in this field in order to save a record" (unchecked) and "Clear the value of this field. You can't choose this option if you make this field required." (checked). There are also options for "Auto add to custom report type" (unchecked) and "Add this field to existing custom report types that contain this entity" (checked). At the bottom, there's a "Lookup Filter" section and a "Step 3 of 6" header with "Previous", "Next", and "Cancel" buttons.

The screenshot shows the continuation of the relationship setup. Step 6 is active, titled "Add custom related lists". It displays the configuration for the "Customer" relationship, including its field label, data type (Lookup), field name (Customer), and description. It asks to specify the title for the related list across all layouts. The "Related List Label" is set to "Customer Orders". It also asks to select page layouts for the field. Under "Add Related List", "Page Layout Name" is listed as "Jewel Customer Layout" with a checked checkbox. A note says "Append related list to users' existing personal customizations". At the bottom, there are "Save & Next", "Save", and "Cancel" buttons.

## 2. Creating a Master-Detail Relationship

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

**Customer Order**

**Step 5 of 6**

**Step 5. Add reference field to Page Layouts**

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

Add Field Page Layout Name  
 Customer Order Layout

Previous Next Cancel

**Customer Order**

**Step 6 of 6**

**Step 6. Add custom related lists**

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

Related List Label:

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

Add Related List Page Layout Name  
 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

SETUP > OBJECT MANAGER  
Jewel Customer

New Custom Field

Step 2 of 4

Help for this Page

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

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 the 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 entry

Previous Next Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Jewel Customer

New Custom Field

Step 4 of 4

Help for this Page

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

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

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER: Jewel Customer'. On the left, a sidebar lists various setup categories under 'Fields & Relationships', with 'Page Layouts' selected. The main content area is titled 'New Custom Field' and 'Step 4. Add to page layouts'. It shows the 'Field Label' as 'Phone', 'Data Type' as 'Phone', and 'Field Name' as 'Phone'. A note says, '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.' Below this is a checkbox for 'Add Field' and a dropdown for 'Page Layout Name' containing 'Jewel Customer Layout'. At the bottom, buttons for 'Previous', 'Save & New', 'Save', and 'Cancel' are visible.

## 5. Creating the Email field in object Jewel Customer

This screenshot is identical to the previous one, showing the creation of a new custom field 'Email' for the 'Jewel Customer' object. The field is of type Email, and it is being added to the 'Jewel Customer Layout'. The setup interface, sidebar, and step 4 details are all the same as in the previous screenshot.

## 6. Creating the number field in Item object

Setup > Object Manager

**Item**

**New Custom Field**

**Step 4. Add to page layouts**

Field Label: Punty  
Data Type: Number  
Field Name: Punty  
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  
 Item Layout

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

Help for this Page

## 7. Creating Picklist Field in Item Object

Setup > Object Manager

**Item**

**New Custom Field**

**Step 4. Add to page layouts**

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  
 Item Layout

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

Help for this Page

## 8. Creating Currency Field in Price Object

**Price**

**New Custom Field**

**Step 3. Establish field-level security**

Field Label: Gold Price  
Data Type: Currency  
Field Name: Gold\_Price  
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	<input type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

**Item**

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: `Gross Margin = Amount - Cost` [More Examples...](#)

**Simple Formula** **Advanced Formula**

**Insert Field** **Insert Operator**

**Gold Price (Currency) =**

```
Gross Margin - Amount * Cost / 10
```

**Functions** [All Function Categories](#)

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

**Quick Tips**

- Getting Started
- Operators & Functions

**Insert Selected Function**

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A sidebar on the left lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Item' and 'New Custom Field'. Step 5 of 5 is shown, titled 'Add to page layouts'. The field details are: Field Label: Gold Price, Data Type: Formula, Field Name: Gold\_Price. Below this, instructions say to select page layouts for the field. Two checkboxes are checked: 'Add Field' and 'Page Layout Name'. Under 'Page Layout Name', 'Item Layout' is selected. A note says to click 'Save & New' to create more fields or 'Save' to finish. Navigation buttons at the bottom include Previous, Save & New, Save, and Cancel.

## 10. Creating Remaining Fields in Objects

Creating remaining fields in the objects

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A sidebar on the left lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Jewel Customer'. The 'Fields & Relationships' section shows 11 items, sorted by Field Label. The table displays the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City_c	Text(20)		
Country	Country_c	Text(18)		
Created By	CreatedBy	Lookup(User)		
Customer Name	Name	Text(80)		✓
Email	Email_c	Email		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone_c	Phone		

## 2. Price : Silver Price

The screenshot shows the Salesforce Setup interface with the following details:

- Object Manager:** Price
- Fields & Relationships:** Details
- Fields & Relationships:** Fields & Relationships
- Table Headers:** FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, INDEXED
- Table Data:**

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 with the following details:

- Object Manager:** Item
- Fields & Relationships:** Details
- Fields & Relationships:** Fields & Relationships
- Table Headers:** FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, INDEXED
- Table Data:**

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(Jewel Customer)		
Expected Days Of Return	Expected_Days_Of_Return__c	Picklist	Priority	
Gold Price	Gold_Price__c	Formula (Currency)		
Item Id	Name	Auto Number		
Item Type	Item_Type__c	Picklist		
KDM	KDM__c	Formula (Currency)		

## 4. Customer Order: Order Status

The screenshot shows the Salesforce Object Manager interface for the 'Customer Order' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main content area displays the 'Fields & Relationships' section, which lists six fields: Created By, Customer, Customer Order Id, Item, Last Modified By, and Order Status. Each field is defined by its label, name, data type, controlling field (if applicable), and indexed status.

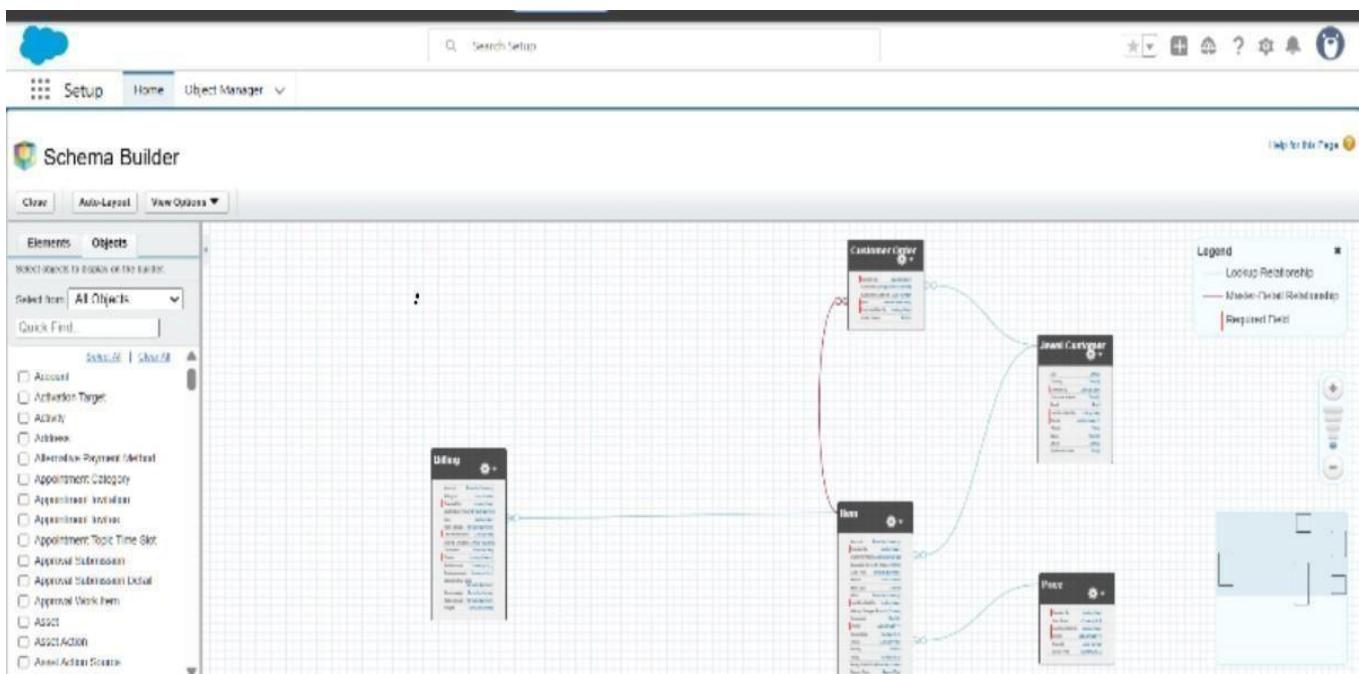
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer_c	Lookup(Jewel Customer)		✓
Customer Order Id	Name	Auto Number		✓
Item	Item_c	Master-Detail(Item)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Order Status	Order_Status__c	Picklist		✓

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

The screenshot shows the Salesforce Object Manager interface for the 'Billing' object. The left sidebar lists various setup options. The main content area displays the 'Fields & Relationships' section, which lists 16 fields: Amount, Billing Id, Created By, Gold/Silver Price, Item, KDM Charge, Last Modified By, and Making Charges. Each field is defined by its label, name, data type, controlling field (if applicable), and indexed status.

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)		

## 11. Creation of Schema Builder



## 12. Creation of Field Dependencies

The screenshot shows the Salesforce Setup interface for the 'Item' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area is titled 'Item Field Dependencies' and shows a table of dependencies. One dependency is listed: 'Priority' (Controlling Field) is dependent on 'Expected Days Of Return'. The table includes columns for Action, Controlling Field, Dependent Field, and Modified By.

Action	Controlling Field	Dependent Field	Modified By
Edit   Del	Priority	Expected Days Of Return	Bobbedi Harshitha Team, 6/23/2025, 6:53 AM

### 13. Creation of Validation Rules

The screenshot shows the Salesforce Setup interface for the 'Jewel Customer' object. The left sidebar lists various setup categories. The main content area is titled 'Jewel Customer Validation Rule' and shows the configuration details for a validation rule named 'Postal\_Code'. The validation rule uses the formula: AND(OR(LEN(Zip\_Postal\_code\_\_c)<=6, NOT(REGEX(Zip\_Postal\_code\_\_c, "[0-9]{6}S"))), NOT(ISBLANK(Zip\_Postal\_code\_\_c))). The rule is active and has an error message: 'Must contain 6 digits'. It was created by 'Bobbedi Harshitha Team' on 6/23/2025, 6:58 AM and modified by the same user on the same date.

Rule Name	Postal_Code	Active
Error Condition Formula:	AND(OR(LEN(Zip_Postal_code__c)<=6, NOT(REGEX(Zip_Postal_code__c, "[0-9]{6}S"))), NOT(ISBLANK(Zip_Postal_code__c)))	✓
Error Message:	Must contain 6 digits	Error Location: Zip/Postal code
Description:		
Created By:	Bobbedi Harshitha Team	Created Date: 6/23/2025, 6:58 AM
Modified By:	Bobbedi Harshitha Team	Modified Date: 6/23/2025, 6:58 AM

SETUP > OBJECT MANAGER

## Jewel Customer

**Jewel Customer Validation Rule**

Validation Rule Detail

Rule Name	ValidationRule_for_JewelCustomerObject	Active	<input checked="" type="checkbox"/>
Error Condition Formula	OR(ISBLANK(City_c), ISBLANK(Country_c), ISBLANK(Phone_c), ISBLANK(State_c), ISBLANK(Street_c))	Error Location	Top of Page
Error Message	Please fill Required fields	Created By	Robbadi Harshitha Team, 6/23/2025, 7:00 AM
Description		Modified By	Robbadi Harshitha Team, 6/23/2025, 7:00 AM

Help for this Page

## 6.6 Creation of Profiles

We create the goldsmith profile and the worker profile

SETUP

Profiles

**Worker Profile**

Profile Detail

Name	Worker Profile	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce Platform		
Description			
Created By	Robbadi Harshitha Team, 6/23/2025, 7:31 AM	Modified By	Robbadi Harshitha Team, 6/24/2025, 10:42 AM

Page Layouts

Standard Object Layouts

Global	Lead
Global Layout [View Assignment]	Lead Layout [View Assignment]
Email Application Not Assigned [View Assignment]	Location [View Assignment]
Home Page Layout Home Page Default [View Assignment]	Location Group [View Assignment]
Account Account Layout [View Assignment]	Location Group Assignment [View Assignment]

## 6.7 Creation of Roles

The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. The left sidebar shows navigation options like 'Users', 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main content area displays a hierarchical list of roles under 'Ideal Institute of Technology'. The roles listed are: CEO, CFO, COO, Gold Smith, Worker, SVP Customer Service & Support, Customer Support International, and Customer Support North America. Each role has 'Edit', 'Del', and 'Assign' buttons.

## 6.8 Creation of Users

The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar shows navigation options like 'Optimizer', 'Sales Cloud Everywhere', 'ADMINISTRATION', 'Users', 'Permission Set Groups', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Data'. The main content area displays a table of 'All Users'. The table includes columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are: Charter Expert, Charter, Charter Free User; EPIC OrgFarm, EPIC, System Administrator; Mikael Kol, mikael@gmail.com, Worker Profile; Mikelson, Niklaus, nikinson@gmail.com, Gold Smith; Team\_Bobbadil\_Harshitha, bob, bobbadilharshitha974@agentforce.com, System Administrator; User\_Integration, integ, integration@00dpx000005ynguo.com, Analytics Cloud Integration User; and User\_Security, sec, insightssecurity@000gp000005ynguo.com, Analytics Cloud Security User.

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Charter Expert	Charter	charly_0000000000ynguo.azmgsguomn@chatter.salestore.com		<input checked="" type="checkbox"/>	Charter Free User
<a href="#">Edit</a>	EPIC OrgFarm	EPIC	epic_1102c97fa52@orgfarm.com		<input checked="" type="checkbox"/>	System Administrator
<a href="#">Edit</a>	Mikael Kol	mikael	mikael@gmail.com		<input checked="" type="checkbox"/>	Worker Profile
<a href="#">Edit</a>	Mikelson, Niklaus	Nikson	nikinson@gmail.com	Gold Smith	<input checked="" type="checkbox"/>	Gold Smith
<a href="#">Edit</a>	Team_Bobbadil_Harshitha	bob	bobbadilharshitha974@agentforce.com	System Administrator	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Integration	integ	integration@00dpx000005ynguo.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<a href="#">Edit</a>	User_Security	sec	insightssecurity@000gp000005ynguo.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

## 6.9 Creation of Page Layouts

We create the page layouts for gold and silver items

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search bar with "Search Setup" and various navigation icons.
- Breadcrumbs:** SETUP > OBJECT MANAGER
- Section:** Item
- Left Sidebar (Page Layouts):**
  - Details
  - Fields & Relationships
  - Page Layouts** (selected)
  - 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 Editor:**
  - Fields:** A table showing fields for the "Gold" object. Fields include Customer Name, Item Type, Ornament, Priority, Silver Price, Weight, KDM, 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, and Total Weight.
  - Quick Find:** A search bar for finding fields.
  - Buttons:** Save, Quick Save, Preview As..., Cancel, Undo, Redo, Layout Properties.
  - Links:** Mini Page Layout, Mini Console View, Video Tutorial, Help for this Page.
- Sample Area:** 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

The screenshot shows the Salesforce Setup interface under the Object Manager tab. On the left, a sidebar lists various setup categories: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types (which is selected and highlighted in blue). The main content area is titled "Record Types" and displays two items: "Gold" and "Silver". The "Gold" record has a description of "Gold items information" and was modified by "Bobbadi Harshitha Team" on 6/25/2025, 4:27 AM. The "Silver" record has a description of "Silver items information" and was modified by "Bobbadi Harshitha Team" on 6/23/2025, 12:15 PM. The top right of the screen includes standard Salesforce navigation icons.

## 6.10 Creation of Permission Sets

The screenshot shows the Salesforce Setup interface under the Object Manager tab. The sidebar on the left shows "Permission Sets" selected. The main content area is titled "Permission Sets" and displays a single permission set named "Per to Worker". The "Permission Set Overview" section shows the API name "Per\_to\_Worker", created by "Bobbadi Harshitha Team" on 6/23/2025, 12:18 PM, and last modified by "Bobbadi Harshitha Team" on 6/23/2025, 12:22 PM. Below this, the "Apps" section is visible, showing sections for "Assigned Apps", "Assigned Connected Apps", "Object Settings", "App Permissions", and "Apex Class Access". The top right of the screen includes standard Salesforce navigation icons.

## 6.11 Creation of Trigger

The screenshot shows the Salesforce IDE interface. The main window displays the Apex class `UpdatePaidAmountTriggerHandler.apxc`. The code implements a trigger handler for the `Billing__c` object. It contains a static method `handleBeforeInsert` that loops through a list of new `Billing__c` records and sets the `Paid_Amount__c` field to the value of the `Paying_Amount__c` field. The IDE includes a code completion dropdown menu on the right side.

```
1 public class UpdatePaidAmountTriggerHandler {
2
3     public static void handleBeforeInsert(List<Billing__c> newBillings) {
4
5         for (Billing__c billing : newBillings) {
6
7             billing.Paid_Amount__c = billing.Paying_Amount__c;
8
9         }
10    }
11 }
```

The screenshot shows the Salesforce Developer Console in a web browser. It displays the trigger definition `UpdatePaidAmountTrigger.apxt` for the `Billing__c` object. The trigger handles both insert and update events. For insertions, it calls the `handleBeforeInsert` method of the `UpdatePaidAmountTriggerHandler`. For updates, it calls the `handleBeforeUpdate` method. The developer console interface includes tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems, with the Problems tab currently selected.

```
1 trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {
2
3     if (Trigger.isInsert) {
4
5         UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);
6
7     } else if (Trigger.isUpdate) {
8
9         UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap, Trigger.new);
10    }
11 }
```

## 6.12 Creation of User Adoption

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

The screenshot shows a web-based application interface for managing inventory. The top navigation bar includes a logo, a search bar, and various system icons. The main title is "jewelry Inventory Sy... Prices". Below the title, there's a section titled "Recently Viewed" with a dropdown arrow and a plus sign icon. A message indicates "10 items • Updated a few seconds ago". The main content area displays a table with columns for "Price Id" and "Name". The data is listed as follows:

	Price Id
1	Price-10
2	Price-09
3	Price-08
4	Price-07
5	Price-06
6	Price-05
7	Price-04
8	Price-03
9	Price-02
10	Price-01

On the right side of the table, there are several small icons for actions like New, Import, Change Owner, and Assign Label.

The screenshot shows a web-based application interface for managing customer information. The top navigation bar includes a logo, a search bar, and various system icons. The main title is "jewelry Inventory Sy... Jewel Customers". Below the title, there's a section titled "Recently Viewed" with a dropdown arrow and a plus sign icon. A message indicates "10 items • Updated a few seconds ago". The main content area displays a table with columns for "Customer Name". The data is listed as follows:

	Customer Name
1	Ajrun
2	Joshna
3	Anand
4	Krishna
5	Sita
6	Nani
7	Shyamala
8	Manasa
9	Ravi
10	Devi

On the right side of the table, there are several small icons for actions like New, Import, Change Owner, and Assign Label.

## 6.13 Creation of Reports

Report Name	Description	Folder	Created By	Created On	Subscribed
Billings with Items and Customer Order	Private Reports	Bobbadi Harshitha Team	6/25/2025, 10:44 AM		
New Item with Billings Report	Private Reports	Bobbadi Harshitha Team	6/25/2025, 10:43 AM		
New Prices Report	Private Reports	Bobbadi Harshitha Team	6/25/2025, 9:56 AM		

## 6.14 Creation of Dashboards

Dashboard 1

New Item with Billings Report

Record Count

Amount	Count
\$0.00	1
\$98.75	1
\$296.00	1
\$380.24	1
\$1,164.79	1
\$2,823.80	1

As of Jun 27, 2025, 6:43 AM Viewing as Bobbadi Harshitha Team

[View Report \(New Item with Billings Report\)](#)

Billings with Items and Customer Order

Record Count

Item Type	Count
Gold	5
Silver	5

As of Jun 27, 2025, 6:43 AM

[View Report \(Billings with Items and Customer Order\)](#)

New Prices Report

Sum of Silver Price: \$132k

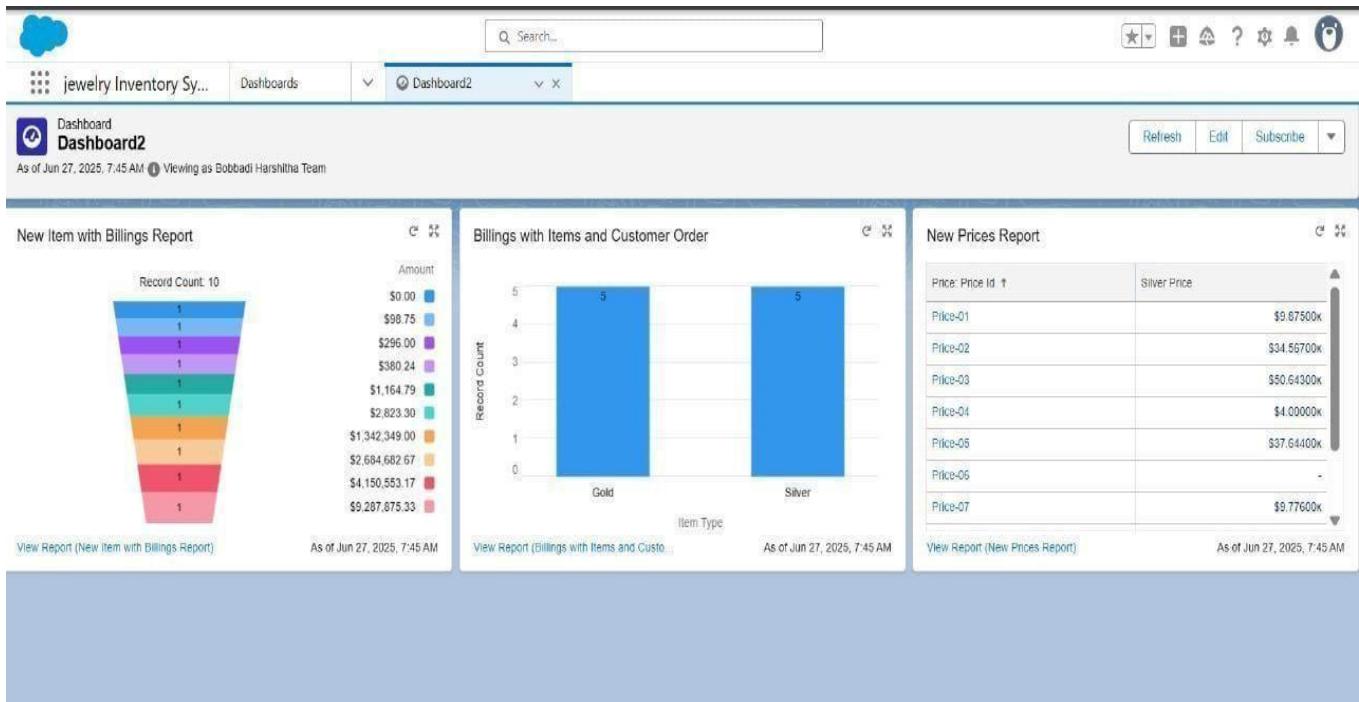
Gold Price

Price Range	Count
\$5,000.00000	1
\$24,780.00000	1
\$56,987.00000	1
\$57,864.00000	1
\$76,534.00000	1

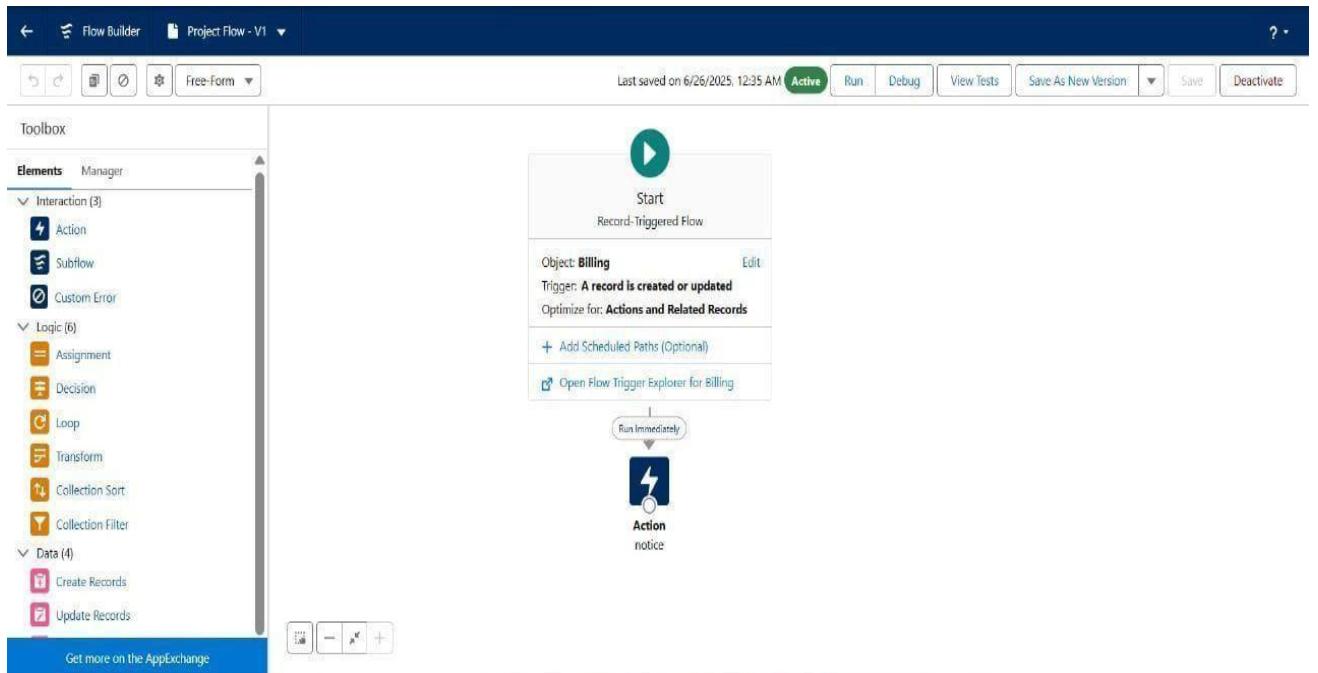
As of Jun 27, 2025, 6:43 AM

[View Report \(New Prices Report\)](#)

## Dashboard 2

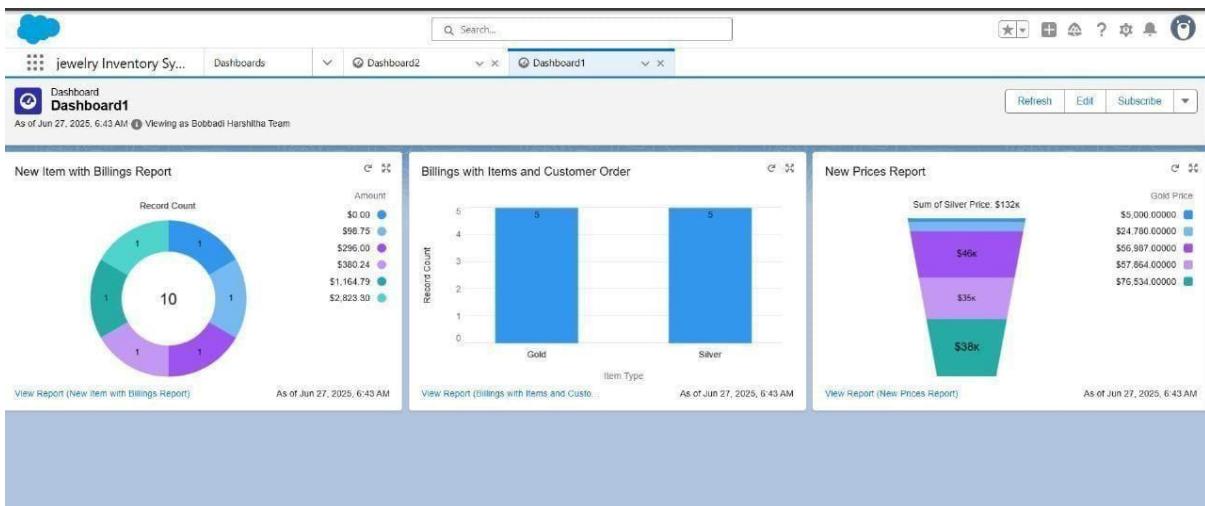


## 6.15 Creation of Flows



## 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.

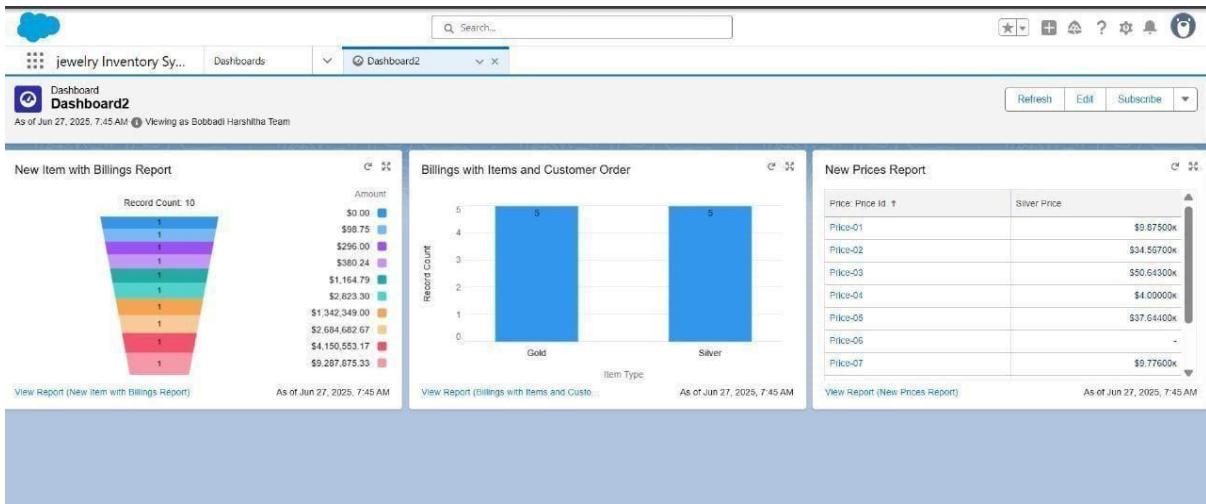
### **2. Enhance Customer Order Management:**

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:**

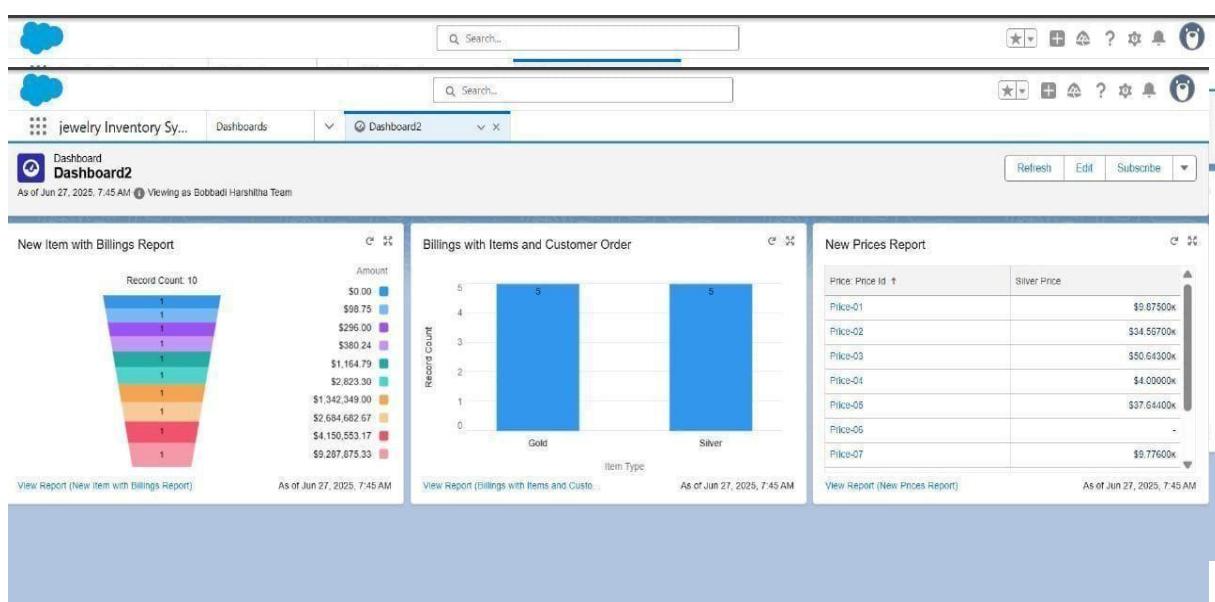
- Trigger-based validations
  - Auto-validate if stock is available before creating an invoice
  - Alert for duplicate product entries

### **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

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

## Dashboards:



## Reports:

**New Prices Report**

Total Records	Total Silver Price
10	\$642,908.00000
<input type="checkbox"/> Gold Price ↑ <input type="checkbox"/> Price: Price Id ↓ <input type="checkbox"/> Silver Price ↓	
<input type="checkbox"/> (1) <span style="float: right;">Price-08</span>	\$0.00000
<b>Subtotal</b>	
<input type="checkbox"/> \$6,000.00000 (1) <span style="float: right;">Price-04</span>	\$4,000.00000
<b>Subtotal</b>	\$4,000.00000
<input type="checkbox"/> \$24,780.00000 (1) <span style="float: right;">Price-01</span>	\$9,878.00000
<b>Subtotal</b>	\$9,878.00000
<input type="checkbox"/> \$68,987.00000 (1) <span style="float: right;">Price-09</span>	\$46,670.00000
<b>Subtotal</b>	\$46,670.00000
<input type="checkbox"/> \$72,864.00000 (1) <span style="float: right;">Price-02</span>	\$34,667.00000
<b>Subtotal</b>	\$34,667.00000
<input type="checkbox"/> \$76,534.00000 (1) <span style="float: right;">Price-06</span>	\$37,644.00000
<b>Subtotal</b>	\$37,644.00000
<input type="checkbox"/> \$86,538.00000 (1) <span style="float: right;">Price-08</span>	\$40,857.00000
Row Counts	Detail Rows
Subtotals	Grand Total

**New Item with Billings Report**

Total Records	
10	
<input type="checkbox"/> Amount ↑ <input type="checkbox"/> Item Id ↓ <input type="checkbox"/> Billing Id ↓	
<input type="checkbox"/> \$0.00 (1) <span style="float: right;">Item-08 Billing-06</span>	
<b>Subtotal</b>	
<input type="checkbox"/> \$98.75 (1) <span style="float: right;">Item-02 Billing-03</span>	
<b>Subtotal</b>	
<input type="checkbox"/> \$296.00 (1) <span style="float: right;">Item-09 Billing-04</span>	
<b>Subtotal</b>	
<input type="checkbox"/> \$380.24 (1) <span style="float: right;">Item-04 Billing-07</span>	
<b>Subtotal</b>	
<input type="checkbox"/> \$1,164.79 (1) <span style="float: right;">Item-06 Billing-09</span>	
<b>Subtotal</b>	
<input type="checkbox"/> \$2,823.30 (1) <span style="float: right;">Item-10 Billing-02</span>	
<b>Subtotal</b>	
<input type="checkbox"/> \$1,542,349.00 (1) <span style="float: right;">Item-01 Billing-01</span>	
Row Counts	Detail Rows
Subtotals	Grand Total

**Billings with Items and Customer Order**

Total Records	
10	
<input type="checkbox"/> Item Type ↑ <input type="checkbox"/> Item Id ↓ <input type="checkbox"/> Billing Id ↓	
<input type="checkbox"/> Gold (5) <span style="float: right;">Item-01 Billing-01</span>	
Item-03 <span style="float: right;">Billing-05</span>	
Item-08 <span style="float: right;">Billing-06</span>	
Item-05 <span style="float: right;">Billing-08</span>	
Item-07 <span style="float: right;">Billing-10</span>	
<b>Subtotal</b>	
<input type="checkbox"/> Silver (5) <span style="float: right;">Item-10 Billing-02</span>	
Item-02 <span style="float: right;">Billing-03</span>	
Item-09 <span style="float: right;">Billing-04</span>	
Item-04 <span style="float: right;">Billing-07</span>	
Item-06 <span style="float: right;">Billing-09</span>	
<b>Subtotal</b>	
<b>Total (10)</b>	

## Flows:

The screenshot shows the Salesforce Flow Details page for a flow named 'Project Flow'. The flow is triggered by 'Record—Run After Save' and is currently 'Activated'. It was last modified on 6/25/2025 at 12:05 PM by the 'Bobbadi\_Harsitha Team'. The flow has no associated records and is categorized under 'Information'.

Field	Value
Type	Record—Run After Save
Associated Record	
Progress Status	Activated
Last Modified Date	6/25/2025, 12:05 PM
Flow Owner	Bobbadi_Harsitha Team

**Related** **Details**

**Information**

Field	Value
Flow Label	Project Flow
Description	
Associated Record	
Created By	Bobbadi_Harsitha Team, 6/25/2025, 12:04 PM
Last Modified	Bobbadi_Harsitha Team, 6/25/2025, 12:05 PM
Category	
API Name	Project_Flow
FlowType	Record-Triggered After Save Flow
Segment	
Created Date	6/25/2025, 12:04 PM
Last Modified Date	6/25/2025, 12:05 PM
Subcategory	

The screenshot shows the Salesforce Flow Builder interface for a flow named 'Project Flow - V1'. The flow is triggered by 'A record is created or updated' on the 'Billing' object. It consists of a single step: an 'Action' step labeled 'notice'.

**Toolbox**

**Elements Manager**

- Interaction (8): Action, Subflow, Custom Error
- Logic (6): Assignment, Decision, Loop, Transform, Collection Sort, Collection Filter
- Data (4): Create Records, Update Records

**Start**  
Record: Triggered Flow  
Object: Billing  
Trigger: A record is created or updated  
Optimize for: Actions and Related Records

**Action**  
notice

## Triggers:

SETUP > OBJECT MANAGER  
**Billing**

**Triggers**  
1 items, Sorted by Label

LABEL	API VERSION	SIZE WITHOUT COMMENTS	MODIFIED BY
UpdatePaidAmountTrigger	64.0	310	Bobbedi Harshitha Team, 6/24/2025, 10:48 AM

SETUP > OBJECT MANAGER  
**Billing**

**Apex Trigger**  
**UpdatePaidAmountTrigger**

[Back to List](#)

**Apex Trigger Detail**

Name	UpdatePaidAmountTrigger	Object Type	Billing
Code Coverage	0% (0)	Status	Active
Created By	Bobbedi Harshitha Team, 6/24/2025, 10:47 AM	Last Modified By	Bobbedi Harshitha Team, 6/24/2025, 10:48 AM
Namespace Prefix			

**Apex Trigger** [Version Settings](#) [Trace Flags](#)

```
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);
    }
}
```

## 9 ADVANTAGES AND DISADVANTAGES:

### ADVANTAGES:

#### Automation Efficiency:

All critical operations 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.