1. Abstract:

CRM Application for Jewel Management - (Developer)

The Jewel Inventory System is a comprehensive software Solution designed to streamline and manage the inventory and sales processes of a jewellery store or a jewellery manufacturer. The system aims to provide an efficient and user-friendly solution to track and control the inventory of various jewellery items, maintain accurate records, and facilitate seamless sales transactions.

What we learnt?

1. Real Time Salesforce Project
2. Data Modelling
3. Creating an Application
4. User Interface Customization
5. Object & Relationship in Salesforce
6. Formula fields and Validation rules.
7. Field Dependencies
8. Record Types
9. Cross object formula fields.
10. Conditional formatting.
11. Flows
12. Email alerts and email templates
13. Reports & Dashboards

2. Salesforce

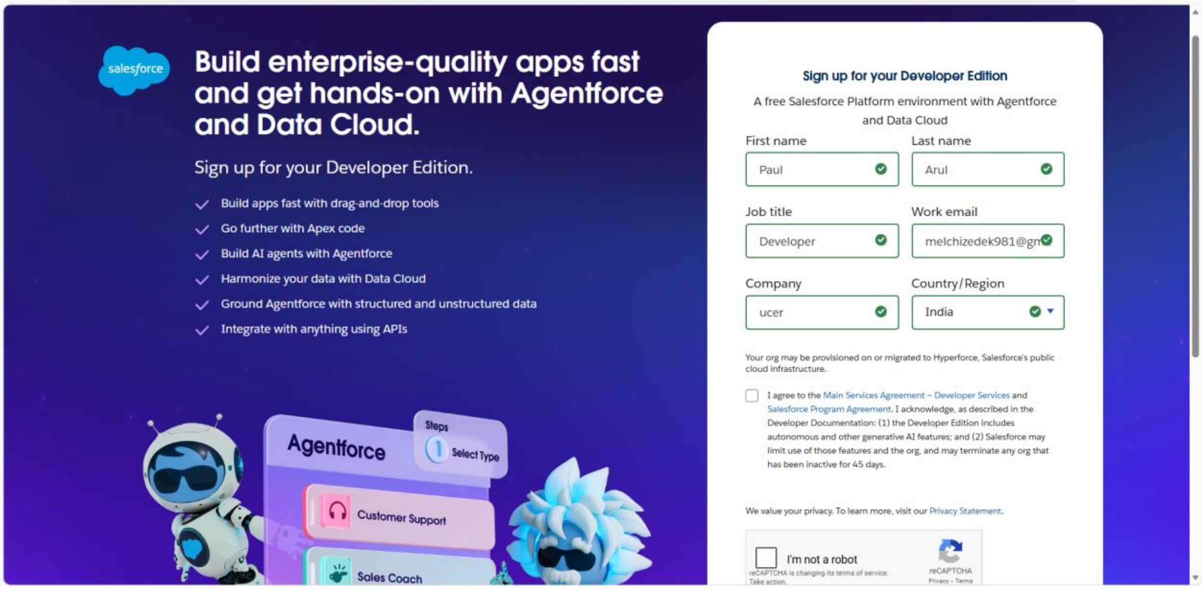
2.1 What Is Salesforce?

- Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.
- Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.
- So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organised something like this: https://youtu.be/r9EX3lGde5k

2.3 Creating Developer Account

Creating a developer org in salesforce.

1. Go to https://developer.salesforce.com/signup
2. On the sign up form, enter the following details:

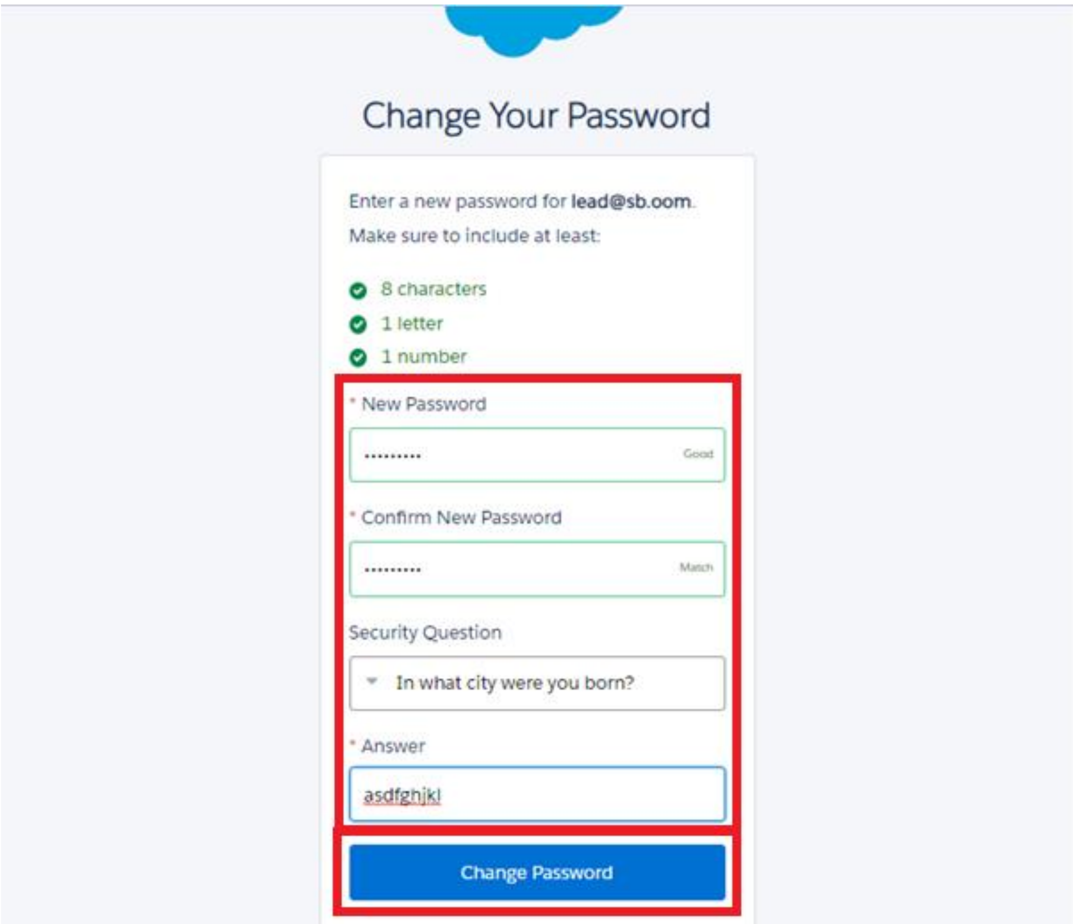


2.4 Account Activation

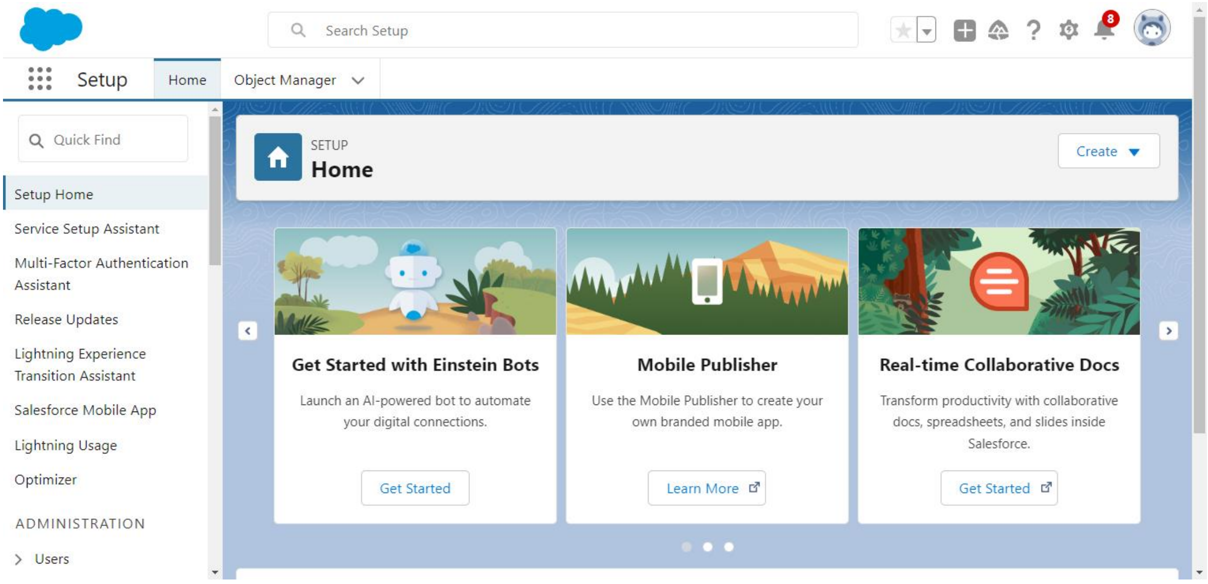
1. Go to the inbox of the email that you used while signing up. Click on the Reset Password to activate your account. The email may take 5-10mins.

2. Click on Reset Password

3. Give a password and answer a security question and click on change password.



4. Then you will redirect to your salesforce setup page.



Finally, the account is created and your salesforce application is configured into a developer edition. Go on to developing your CRM platform.

3.Creating Object:

3.1What Is an Object?

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

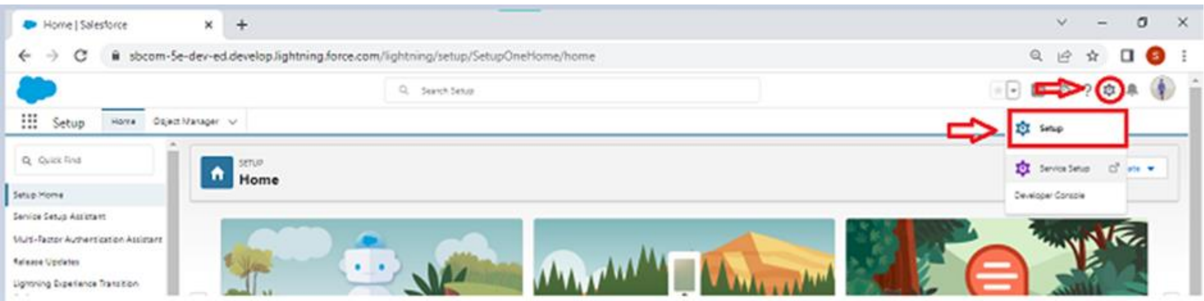
Salesforce objects are of two types:

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

Creating an object in Salesforce organisation is essential for efficient data management and process automation. By defining custom objects, businesses can structure and store data specific to their needs, enabling streamlined workflows, personalized reporting, and enhanced user experiences. Objects serve as the foundation for organizing and leveraging critical information within Salesforce.

To Navigate to Setup page:

Click on gear icon >> click setup.

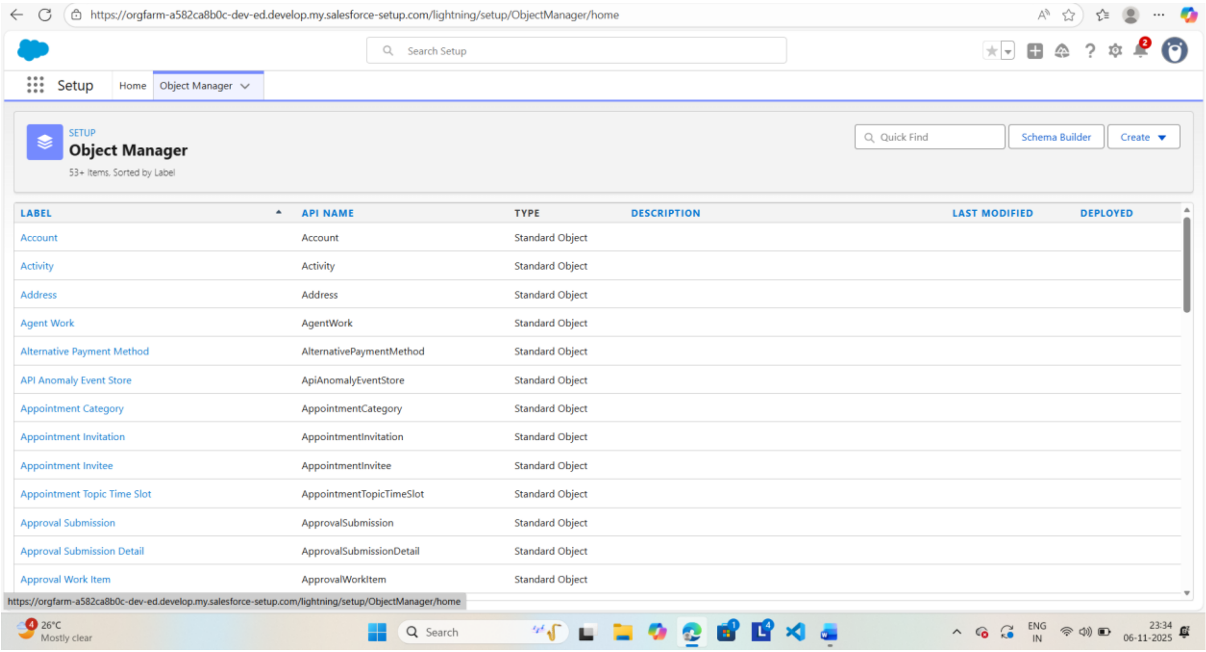


3.2 **Create Jewel Customer Object**

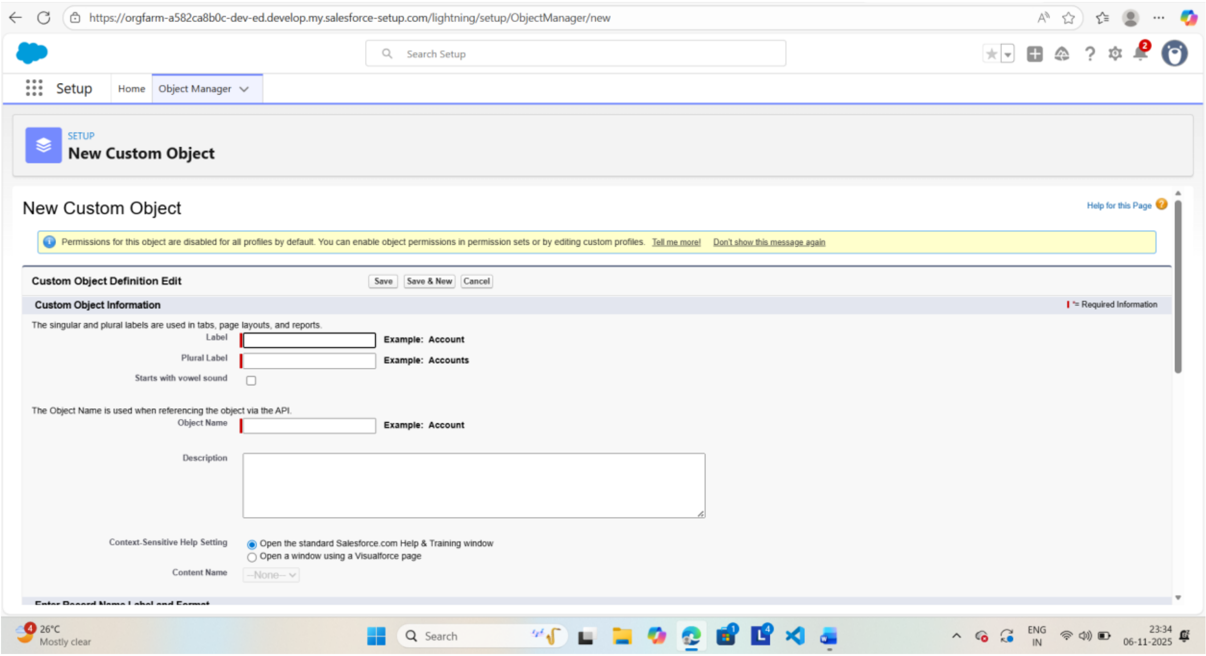
The purpose of creating a Jewel Customer custom object is to store and manage information about Customer.

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

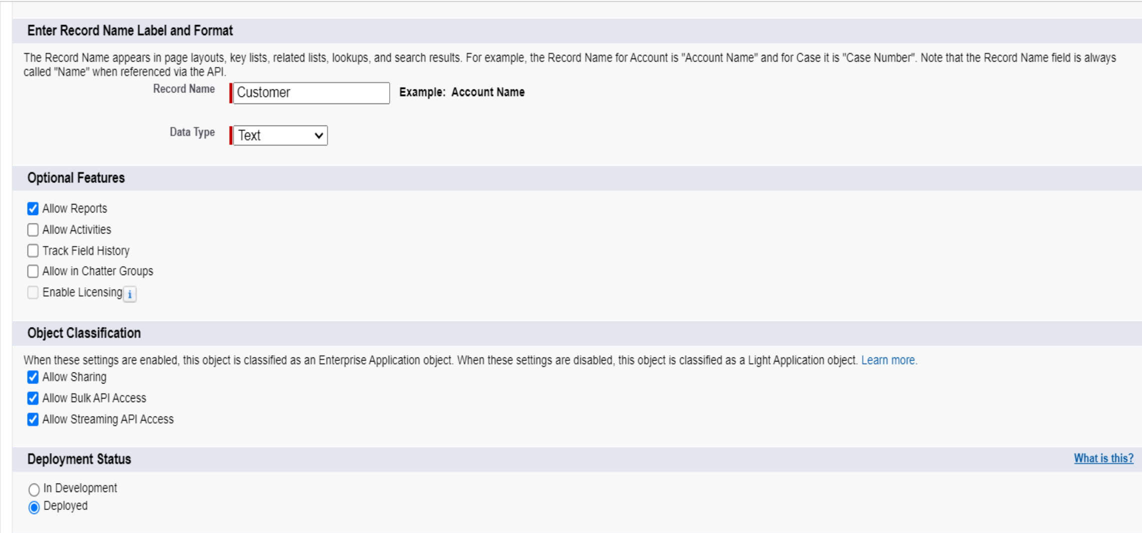


1. Enter the label name: Jewel Customer
2. Plural label name: Jewel Customers



3. Enter Record Name Label and Format

- Record Name >> Customer name
- Data Type >> Text



3. Click on Allow reports.
4. Allow search and click Save.

3.3 Creation of item object:

- Enter Record Name Label and Format
- Record Name >> Item Id
- Data Type >> Auto Number
- Display Format >> Item-{00}
- Starting Number >> 1
- Click on Allow reports.
- Allow search >> Save.
- Create 3 more objects with label names as Customer Order,Price,Billing
- (Use “Auto Number” as a data type for Customer Order,Price,Billing).

1. Tabs:

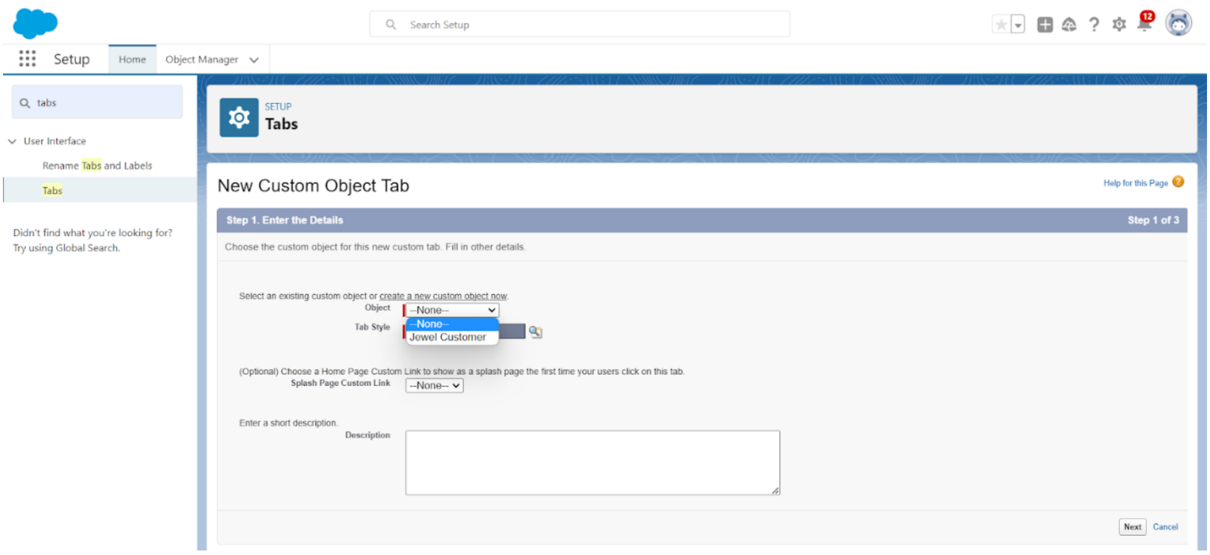
Creating Objects and storing Jewels data is the very first step in the requirements they want. Now to access the stored data by an Owner(Gold Smith) in the organisation Admin needs to create Tabs. By designing a dedicated Tab, businesses can improve user experience, simplify navigation, and provide quick access to critical information, enhancing productivity and ensuring efficient utilisation of Salesforce's capabilities.

To create a Tab:(Customer)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)

Fig: Tab Creation

Select Object(Jewel Customer) >> Select any tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) keep it as default >> Save.



4.1To create a Tab:(Item):

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Item) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) keep it as default >> Save.

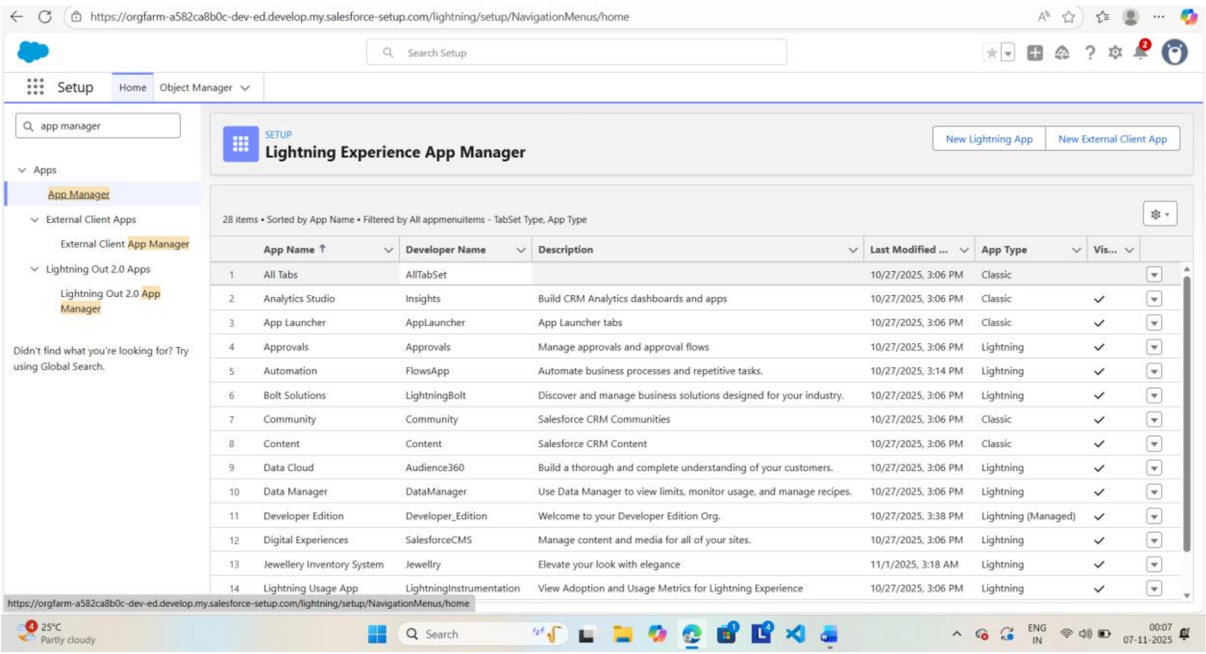
Note: Now create tabs for Customer Order, Price, Billing objects.

2. The Lightning app:

- An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps gives users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.
- Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

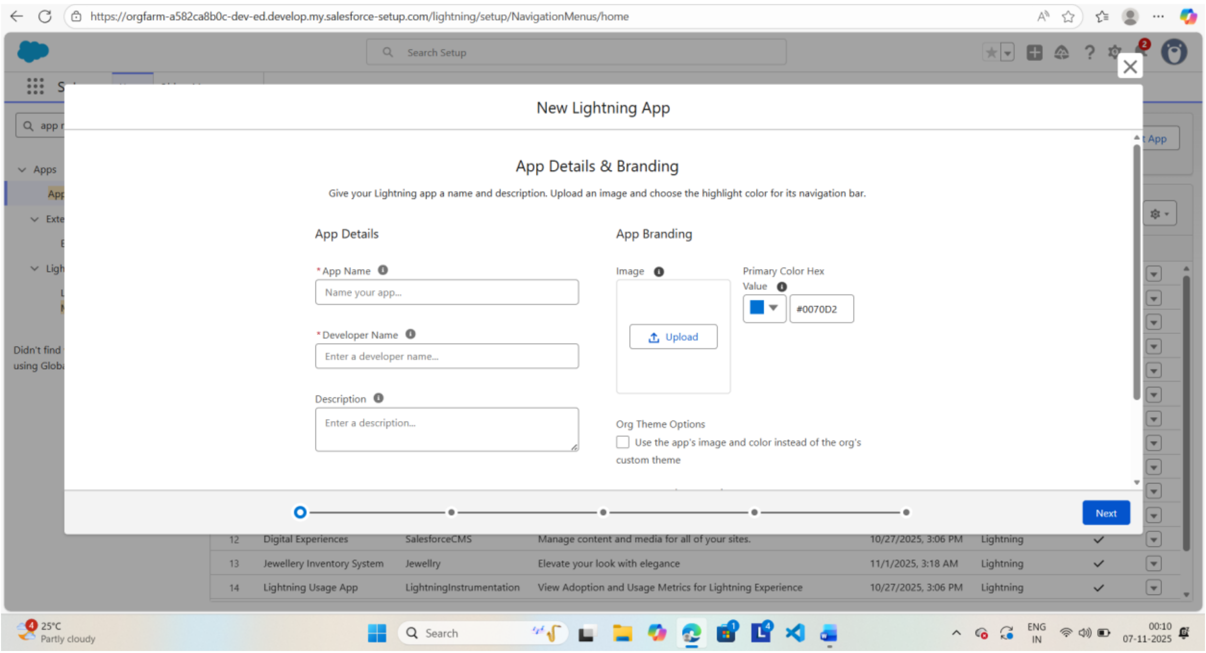
5.1 Creation of Lighting app:

1. Go to setup page >> search "app manager" in quick find >> select "app manager" >> click on New lightning App.

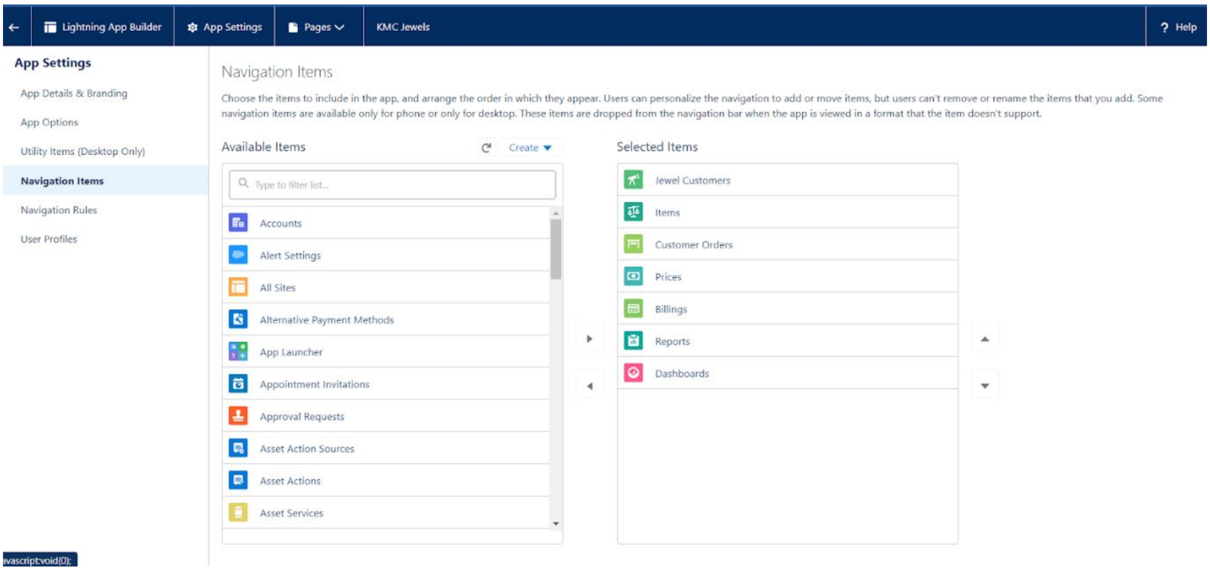


	App Name	Developer Name	Description	Last Modified ...	App Type	Vis...
1	All Tabs	AllTabSet		10/27/2025, 3:06 PM	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	10/27/2025, 3:06 PM	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	10/27/2025, 3:06 PM	Classic	✓
4	Approvals	Approvals	Manage approvals and approval flows	10/27/2025, 3:06 PM	Lightning	✓
5	Automation	FlowsApp	Automate business processes and repetitive tasks.	10/27/2025, 3:14 PM	Lightning	✓
6	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	10/27/2025, 3:06 PM	Lightning	✓
7	Community	Community	Salesforce CRM Communities	10/27/2025, 3:06 PM	Classic	✓
8	Content	Content	Salesforce CRM Content	10/27/2025, 3:06 PM	Classic	✓
9	Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	10/27/2025, 3:06 PM	Lightning	✓
10	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	10/27/2025, 3:06 PM	Lightning	✓
11	Developer Edition	Developer_Edition	Welcome to your Developer Edition Org.	10/27/2025, 3:38 PM	Lightning (Managed)	✓
12	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	10/27/2025, 3:06 PM	Lightning	✓
13	Jewellery Inventory System	Jewellry	Elevate your look with elegance	11/1/2025, 3:18 AM	Lightning	✓
14	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	10/27/2025, 3:06 PM	Lightning	✓

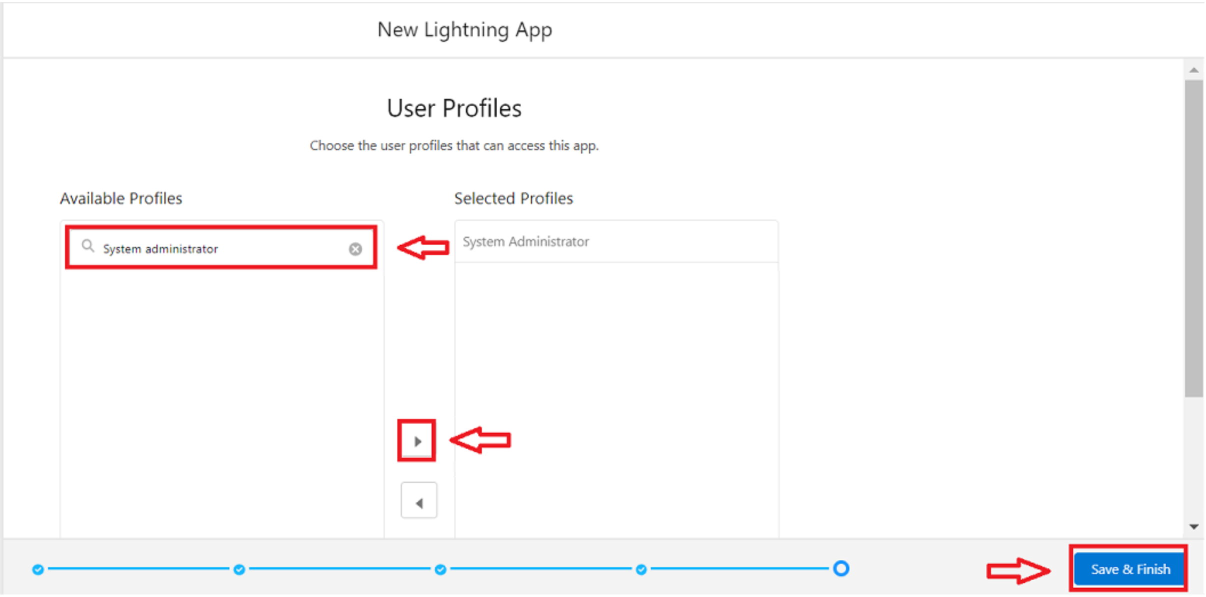
2. Fill the app name in app details and branding as follow
   App Name : Jewellery Inventory System.
   Developer Name : This will auto populated
   Description : Elevate your look with elegance
   Image : optional (if you want to give any image you can otherwise not mandatory)
   Primary colour hex value : keep this default.



3. Then click Next >> (App option page)Set Navigation Style as Console Navigation >> Next.
4. Utility Items) keep it as default >> Next.
   To Add Navigation Items:



5. Search for the item in the (JewelCustomer,Item,CustomerOrder,Price,Billing,Reports, Dashboard) from the search bar and move it using the arrow button ? Next? Next.
6. To Add User Profiles:



Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

6.Creating Fields:

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields :

1. Standard Fields
2. Custom Fields

6.1 **Creating Lookup Relationship**

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

1. Go to the setup page >> click on object manager >> type object name(Customer Order) in the quick find bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select "Lookup relationship" as data type and click Next.

4. Select the related object " Jewel Customer ".
5. Give Field Label as "Customer" and click Next.
6. Next >> Next >> Save.

6.2 **Creating a Master-Detail Relationship**

To Create a Master-Detail relationship :

1. Go to the setup page >> click on object manager >> type object name(Customer Order) in the quick find bar >> click on the object.

2.Click on fields & relationships >> click on New.

3.Select "Master-Detail relationship" as data type and click Next.

4.Select the related object " Item".

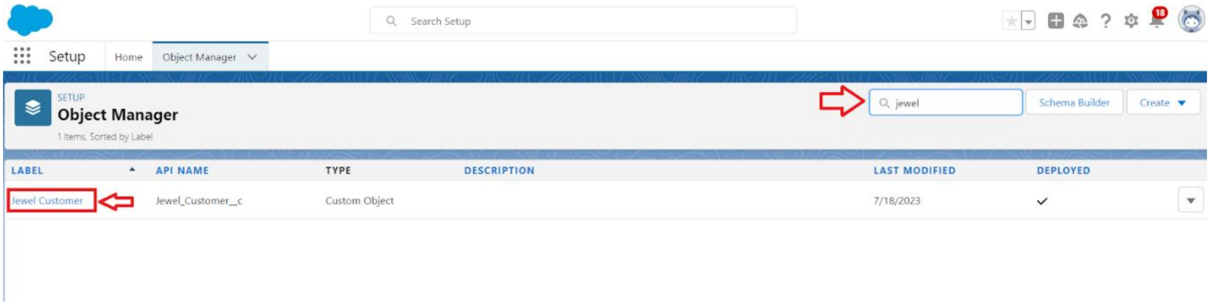
5.Give Field Label as "Item" and click Next.

6.Next >> Next >> Save.

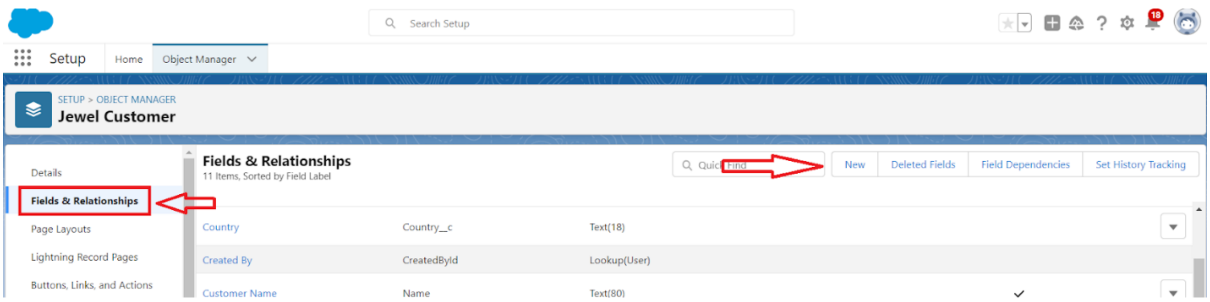
6.3 **Creating Text Field in Jewel Customer Object**

To create fields in an object:

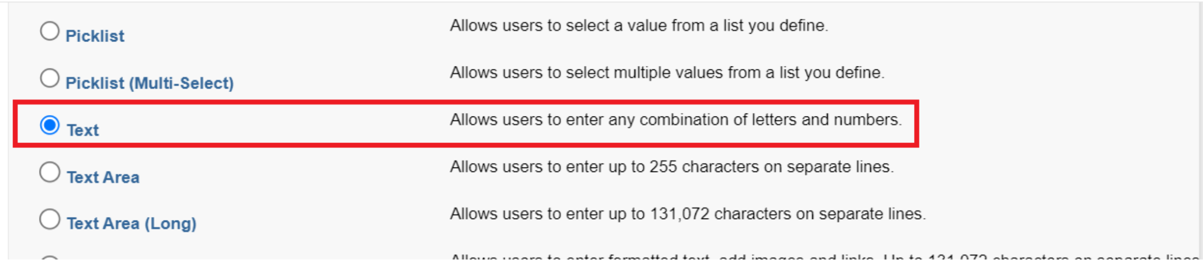
1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.



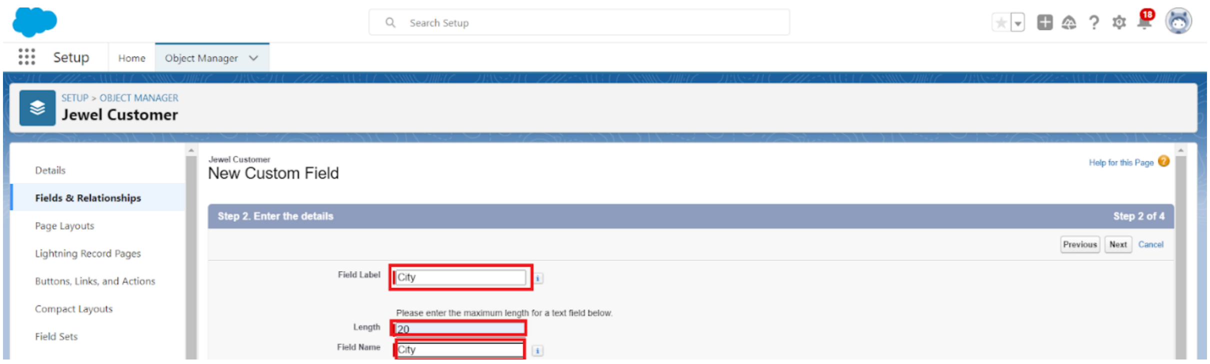
2. Now click on "Fields & Relationships" >> New



3. Select Data type as “Text”.



4. Click on Next



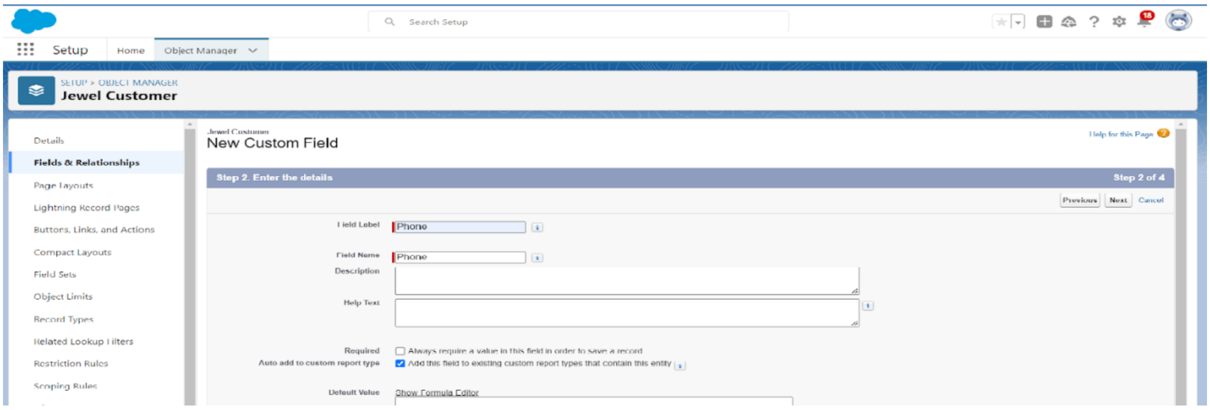
5. Fill the above as following:

- Field Label: City
- Length : 20
- Field Name : gets auto generated
- Click on Next >> Next >> Save and new.

6.4 **Creating the Phone field in object Jewel Customer**

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Phone” and click Next.
4. Given the Field Label as “ Phone”.



5. Field Name will be auto populated, and click on Next >> Next >> Save & new.

6.5 **Creating the Email field in object Jewel Customer**

To create fields in an object:

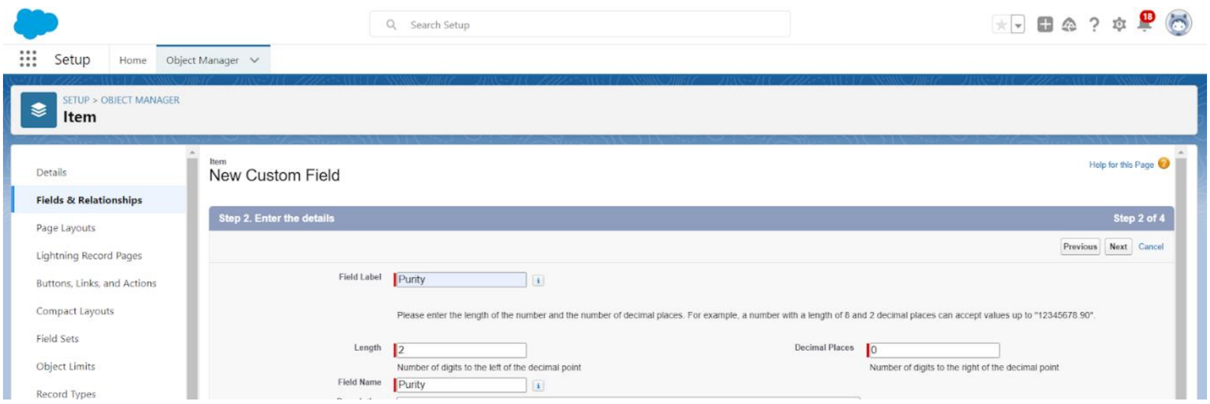
1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Email” and click Next.
4. Given the Field Label as “ Email”.

5. Field Name will be auto populated, and click on Next >> Next >> Save.

6.6 **Creating the number field in Item object**

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Number” and click Next.
4. Given the Field Label as “ Purity” and length as “ 2 ”.

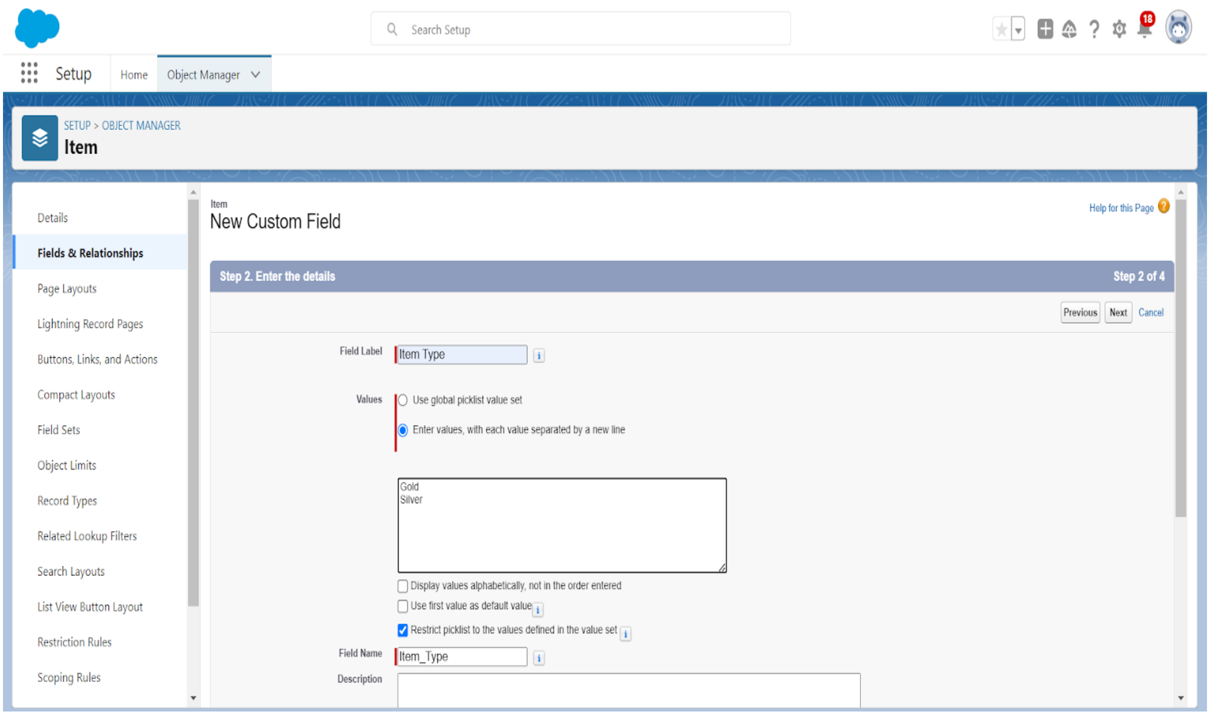


5. Field Name will be auto populated, and click on Next >> Next >> Save.

6.7 **Creating Picklist Field in Item Object**

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar>> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select Data type as “Picklist” and click Next.
4. Enter Field Label as “Item Type”.
5. In values select “Enter values(Gold,Silver), with each value separated by a new line" and enter values as shown below.



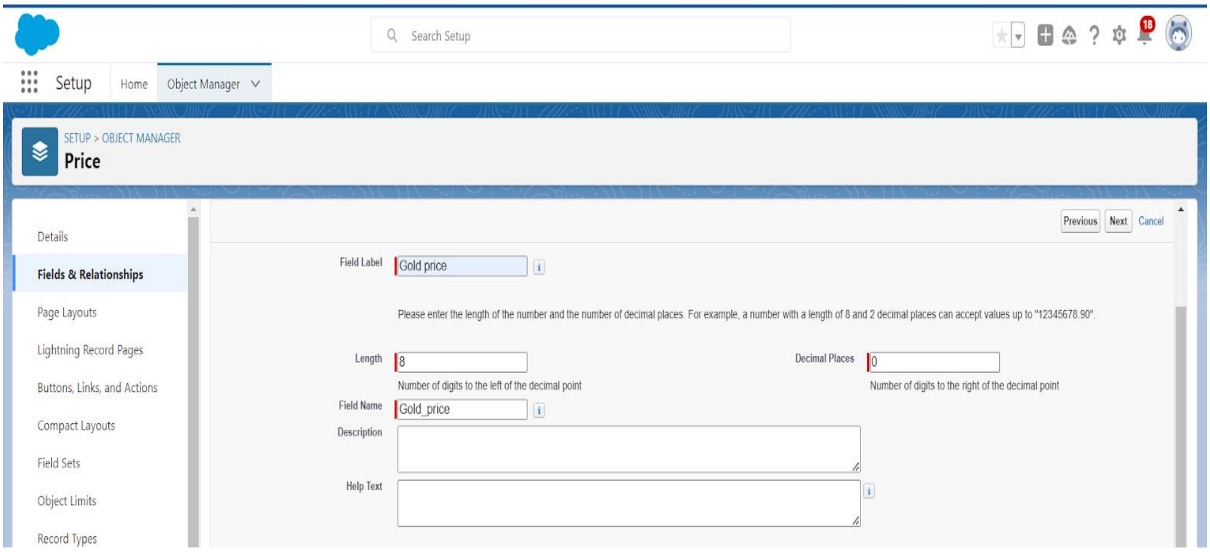
6. Click Next? Next? Next? Save.

6.8 **Creating Currency Field in Price Object**

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Price) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.

3. Select Data type as “Currency” and click Next.



4. Enter Field Label as “Gold Price” and length as “ 8”and decimal 0.Field name will be auto generated.

5. Click Next >> Next >> Next >> Save.

6.8 **Creating Formula Field(Cross Object) in Item Object**

To create fields in an object:

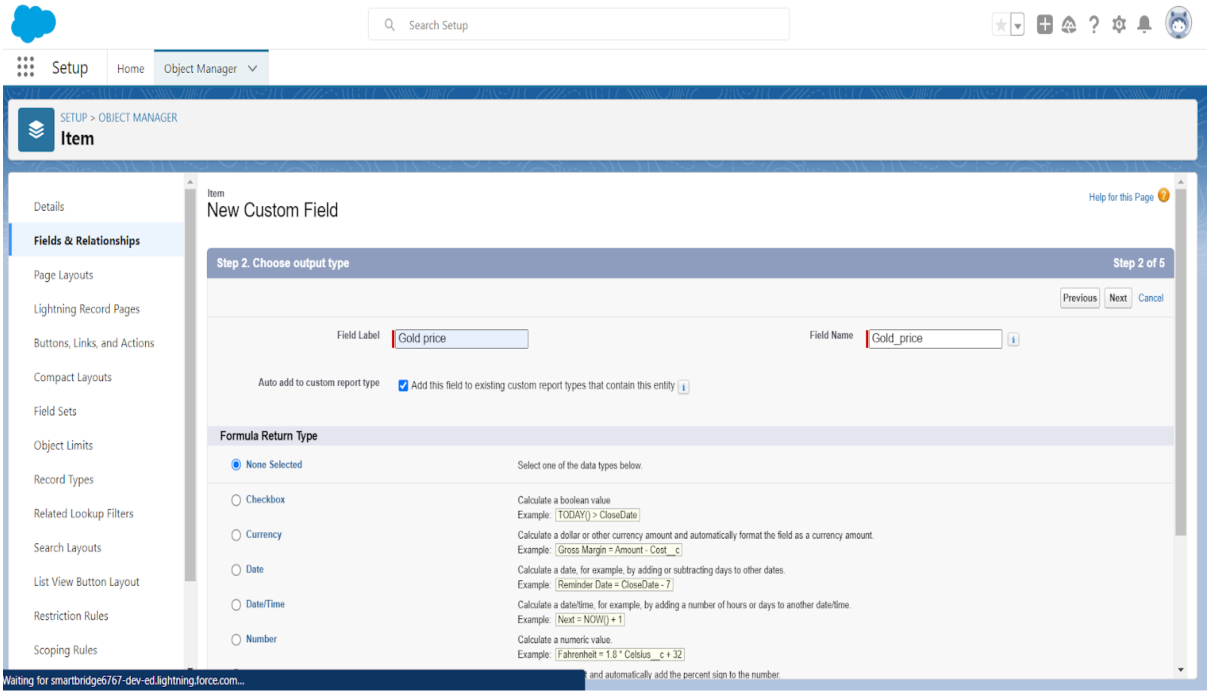
(Note:Create a Lookup Relationship in Item Object to Price Object with Field Name:Prices)

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.

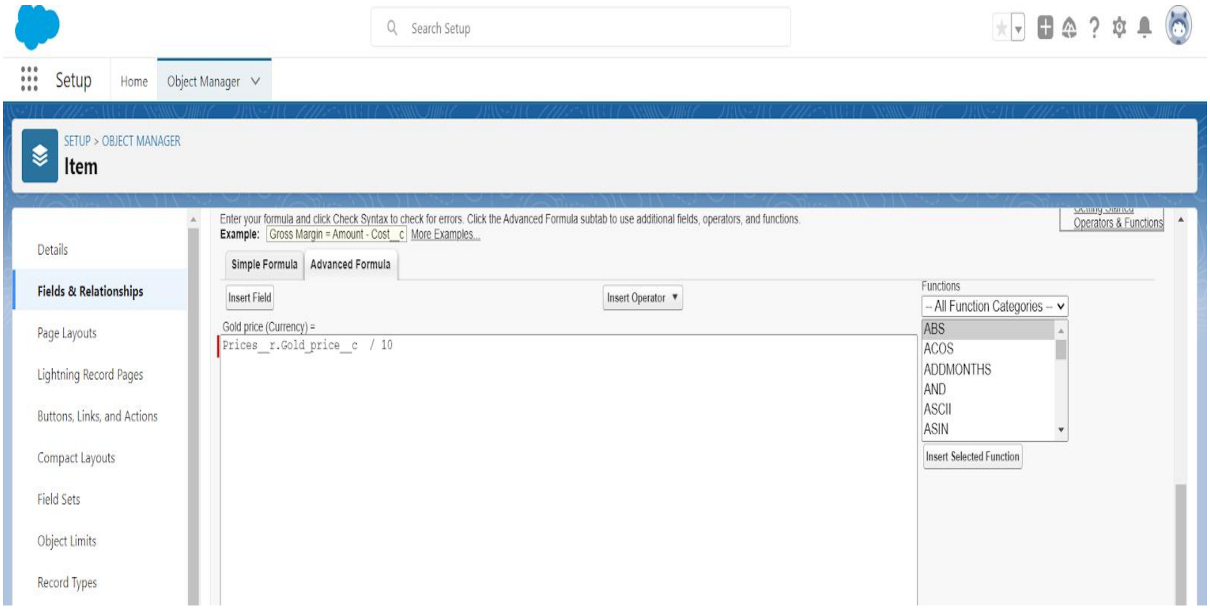
2. Now click on “Fields & Relationships” >> New.

3. Select Data type as “Formula” and click Next.

Give Field Label and Field Name as “Gold Price” and select formula return type as “Currency” and click next.



4. Under Advanced Formula write down the formula**: Prices__r.Gold_price__c / 10.**



5. click “Check Syntax” and Next >> Next >> Save & New.

6.9 Creating Remaining Fields in Objects

Now create the remaining fields using the data types mentioned.

<table>
<tr><th>S.No</th><th>Object name</th><th>Fields</th></tr>
<tr><td>1.</td><td>Jewel Customer</td><td><table><tr><th>Field Name</th><th>Data type</th></tr><tr><td>State</td><td>Text(20)</td></tr><tr><td>Street</td><td>Text(20)</td></tr><tr><td>Country</td><td>Text(18)</td></tr><tr><td>Zip/Postal code</td><td>Text(6)</td></tr></table></td></tr>
<tr><td>2.</td><td>Price</td><td><table><tr><td>Silver Price</td><td>Currency
(Length=8,Decimal=5)</td></tr></table></td></tr>
<tr><td>3.</td><td>Item</td><td><table><tr><td>Field Label:Customer Name</td><td>Lookup Relationship with Jewel Customer Object</td></tr><tr><td>Ornament</td><td>Text(20)</td></tr><tr><td>Weight</td><td>Number
(Length=8,Decimal=5)</td></tr><tr><td>Stone Weight</td><td>Number
(Length=5,Decimal=5)</td></tr><tr><td>Percentage</td><td>Number
(Length=2,Decimal=0)</td></tr><tr><td>Stone/Other Price</td><td>Currency
(Length=8,Decimal=2)</td></tr><tr><td>Expected Days Of Return</td><td>Picklist</td></tr></table></td></tr>
</table>

			1-3 Days 4-5 Days 6-7 Days 8-10 Days
		Priority	Picklist Low Medium High Critical
		Silver Price	Formula (Return Type:Number) (Decimal=3) (Prices__r.Silver_price__c / 1000)
		Purity Gold Price	Formula (Return Type:Currency) (Decimal=2) ((Prices__r.Gold_price__c * Purity__c) / 24) / 10
		Total Weight	Formula (Return Type:Number) (Decimal=3)

			(Weight__c - Stone_ weight__c)
		Amount	Formula (Return Type:Currency) (Decimal=3) IF(ISPICKVAL(Item_Type__c ,"Gold"), Total_weight__c * Purity_Gold_price__c , Total_weight__c * Silver_price__c)
		KDM	Formula (Return Type:Currency) (Decimal=0) (Amount__c * Percentage__c) / 100
		Making Charges	Formula (Return Type:Currency) (Decimal=0) IF(ISPICKVAL(Item_Type__c ,"Gold"), Weight__c

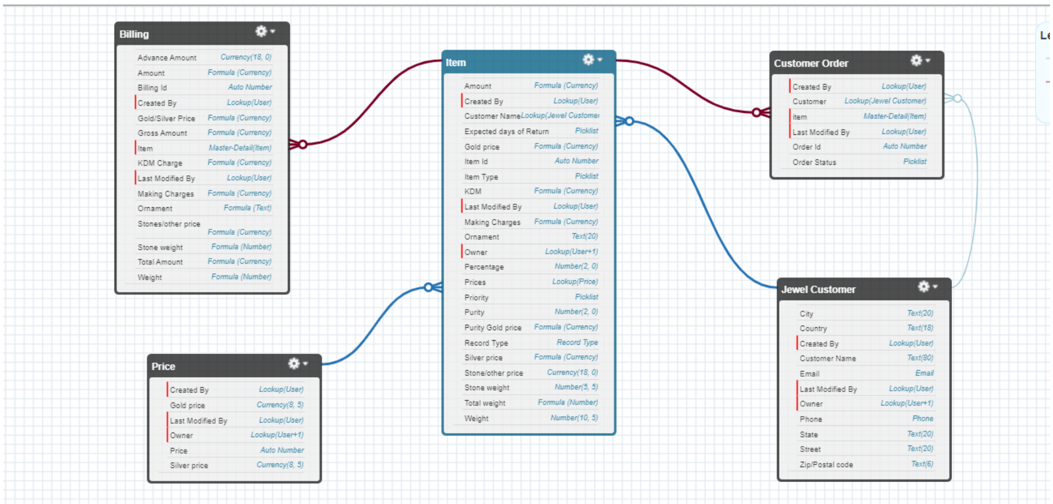
			* 300 , Weight__c * 10)
4.	Customer Order	Order Status	Picklist Started Not Started On Hold Completed Not Completed
5.	Billing	Field Label:Item	Lookup Relationship with Item Object
		Ornament	Formula (Return Type:Text) Item__r.Ornament__c
		Stone weight	Formula (Return Type:Number) (Decimal=2) Item__r.Stone_weight__c
		Weight	Formula Return Type:Number (Decimal=2) Item__r.Total_weight__c

Amount	Formula (Return Type:Currency) (Decimal=2) Item__r.Amount__c
Gold/Silver Price	Formula (Return Type:Currency) (Decimal=2) IF(ISPICKVAL(Item__r.Item_Type__c ,"Gold"), Item__r.G _c , Item__r.Silver_price__c)
KDM Charge	Formula (Return Type:Currency) (Decimal=0) Item__r.KDM__c
Making Charges	Formula (Return Type:Currency) (Decimal=2) Item__r.Making_Charges__c
Stones/other price	Formula (Return Type:Currency) (Decimal=2) Item__r.Stone_other_price__c
Total Amount	Formula (Return Type:Currency) (Decimal=0) Amount__c + KDM_Charge__c + Stones_other_price__c +

				Making_Charges__c

6.10 **Schema Builder**

Schema Builder is a powerful tool within Salesforce that allows you to visualise, explore, and design the relationships between objects in your Salesforce organisation. It provides a graphical representation of the data model, making it easier to understand the structure and connections between different objects.

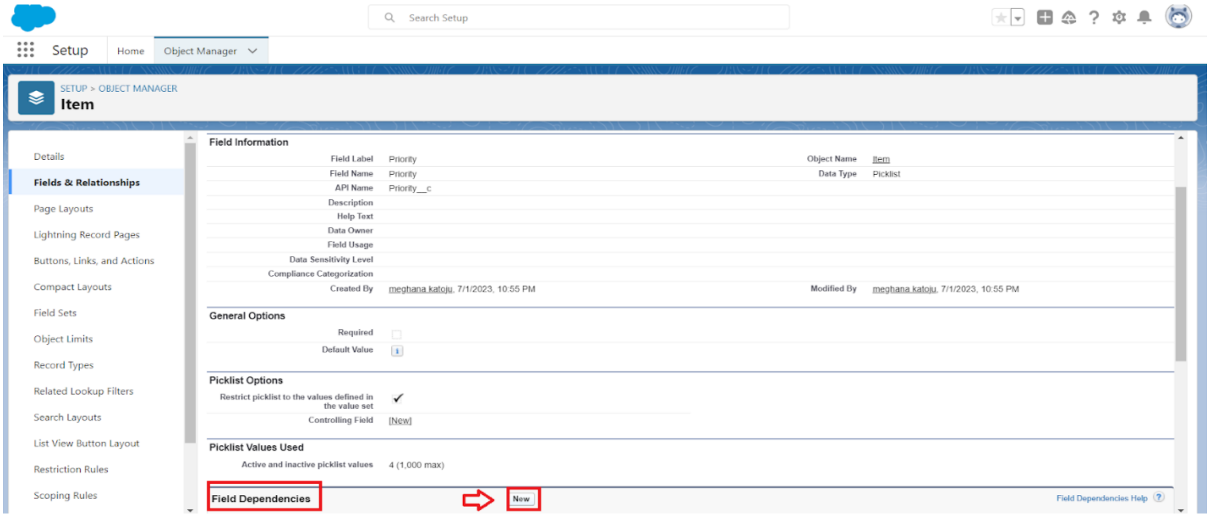


6.11 **Creating the Field Dependencies**

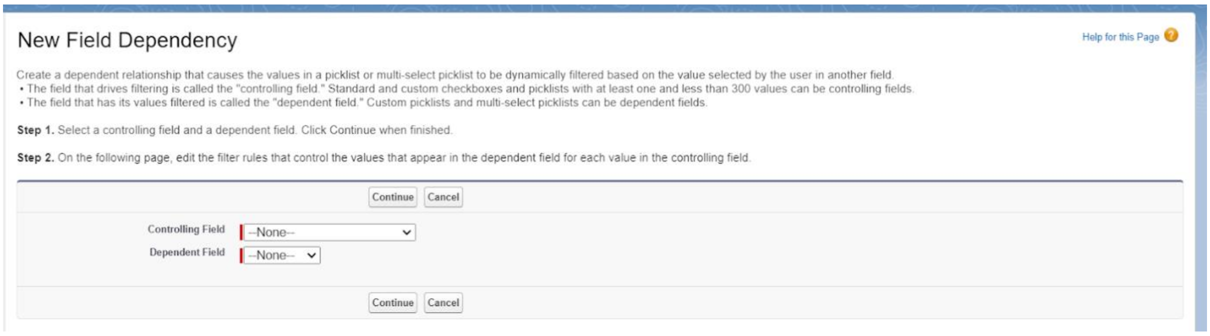
Field Dependencies are used to create relationships between fields within an object. They allow you to control the visibility and availability of fields based on the values selected in other fields.

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar >> click on the object.
2. Click on Fields & Relationships and click on the Priority field.

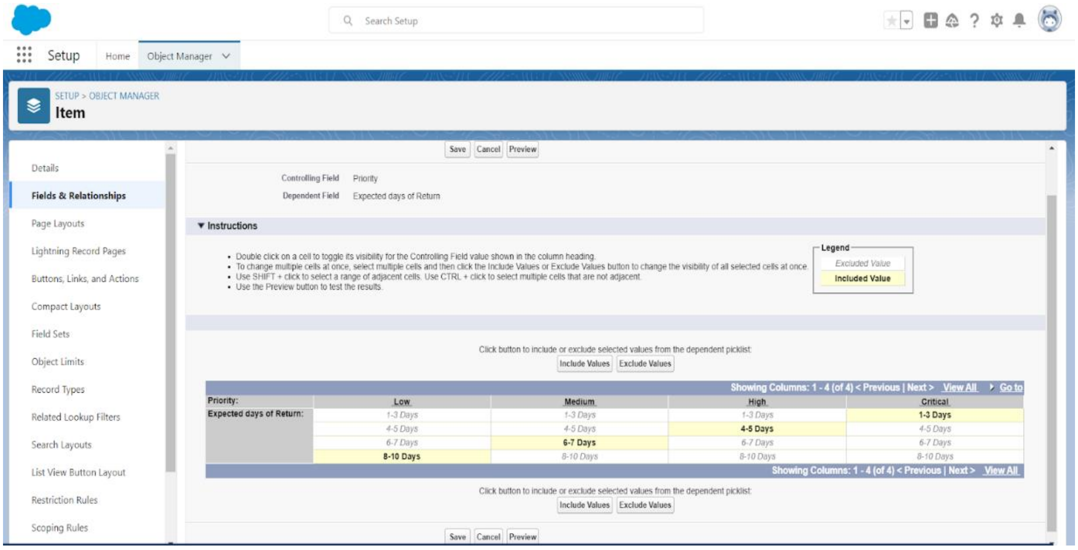
3. Search for Field Dependencies and click on New.



4. Select Controlling Field as "Priority" and Depending field as "Expected Days of Return" >> Continue.



5. Select the "Expected Days of Return" values of related Priority values and Click on Include Values >> Save.



6.12 **Creating the validation rule**

NOTE:

Create One more Validation rule for Jewel Customer object.

1. Enter Rule name as “ValidationRule For JewelCustomerObject “.
2. Insert the Error Condition Formula as : -
   OR(ISBLANK(City__c) , ISBLANK(Country__c),ISBLANK(Phone__c),ISBLANK(State__c),ISBLANK(Street__c))
3. Enter the Error Message as “Please fill Required fields”, select the Error location as Top of Page and click Save.

Create Validation rule for Item object.

1. Enter Rule name as “ValidationRule For Item“.
2. Insert the Error Condition Formula as : -
   OR(ISBLANK(Amount__c) , ISBLANK(Customer_Name__c) ,ISBLANK(Gold_price__c),ISBLANK(KDM__c),ISBLANK(Ornament__c),ISBLANK(Percentage__c),ISBLANK(Making_Charges__c),ISBLANK(Prices__c),ISBLANK(Stone_weight__c),ISBLANK(Silver_price__c),ISBLANK(Stone_other_price__c),ISBLANK(Stone_weight__c),ISBLANK(Weight__c))
3. Enter the Error Message as “Please fill Required fields”, select the Error location as Top of Page and click Save.

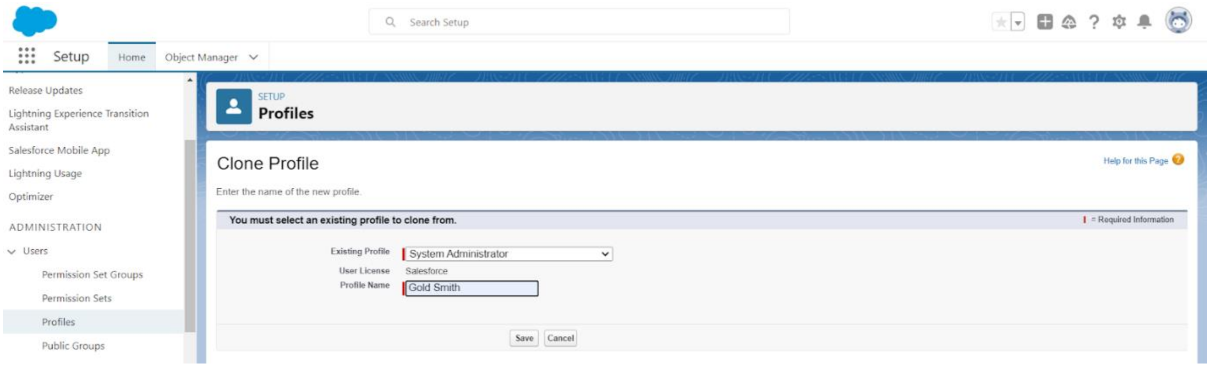
7.**Fields**

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

7.1 **Gold Smith Profile**

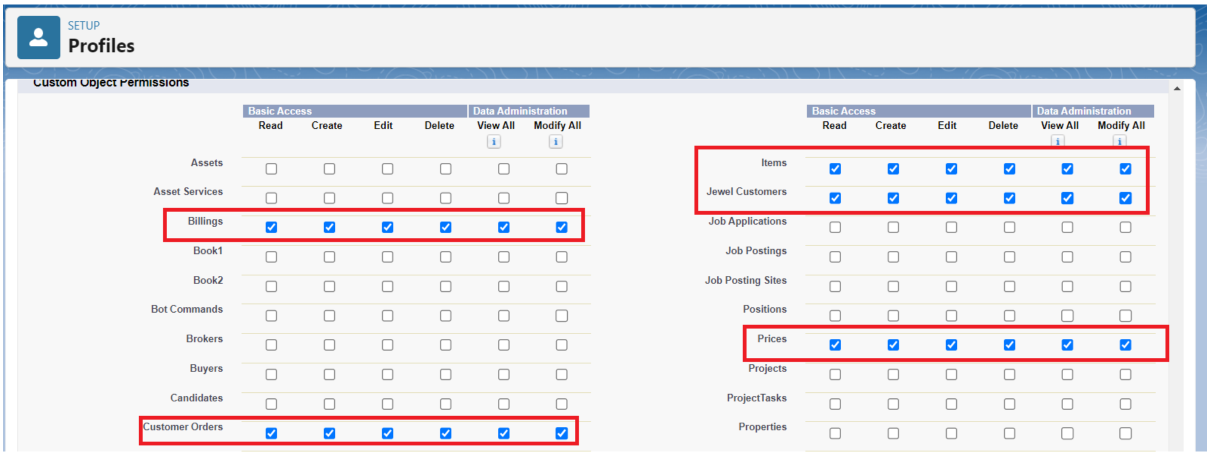
To create a new profile:

1. Go to setup >> type profiles in quick find box >>click on profiles ? clone the desired profile (System Administrator) >> enter profile name (Gold Smith) >> Save.



2.While still on the profile page, then click Edit. Scroll down to Custom Object Permissions and Give access permissions for Jewel Customer,Item,Customer Order,Prices,Billings

.



3. Scroll down and Click on Save.

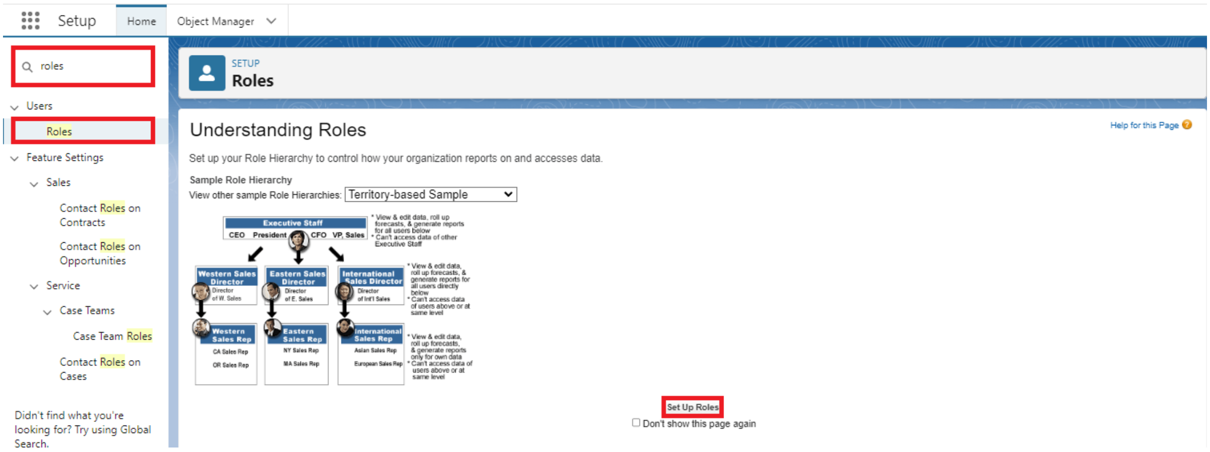
7.2 **Worker Profile**

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Salesforce Platform User) >> enter profile name () >> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Items,Price and Customer Order objects.
4. Scroll down and Click on Save.

8.**Roles:**

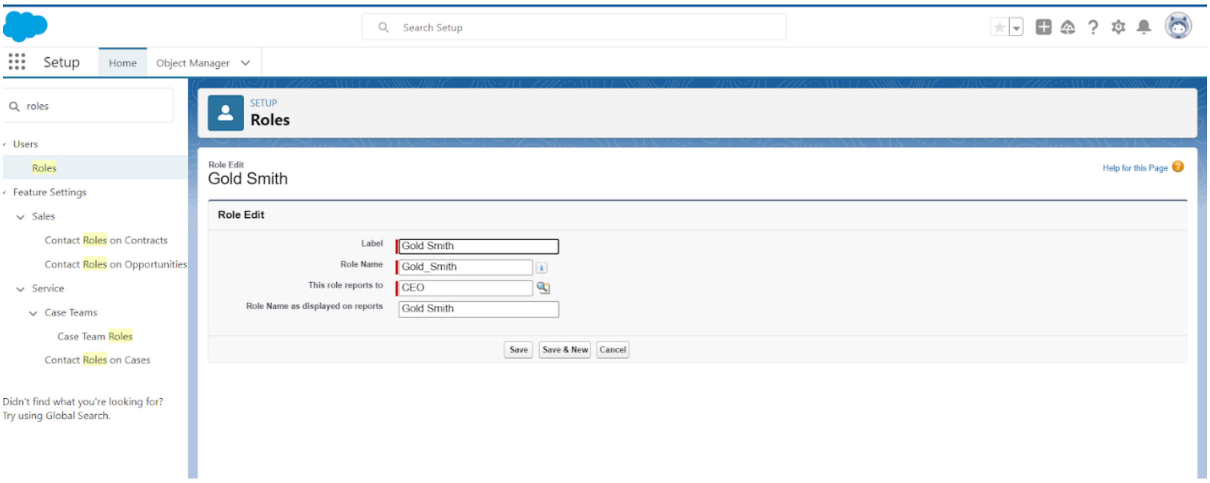
8.1 Creating Gold Smith Role

1. From setup ,Go to quick find >> Search for Roles >> click on set up roles.

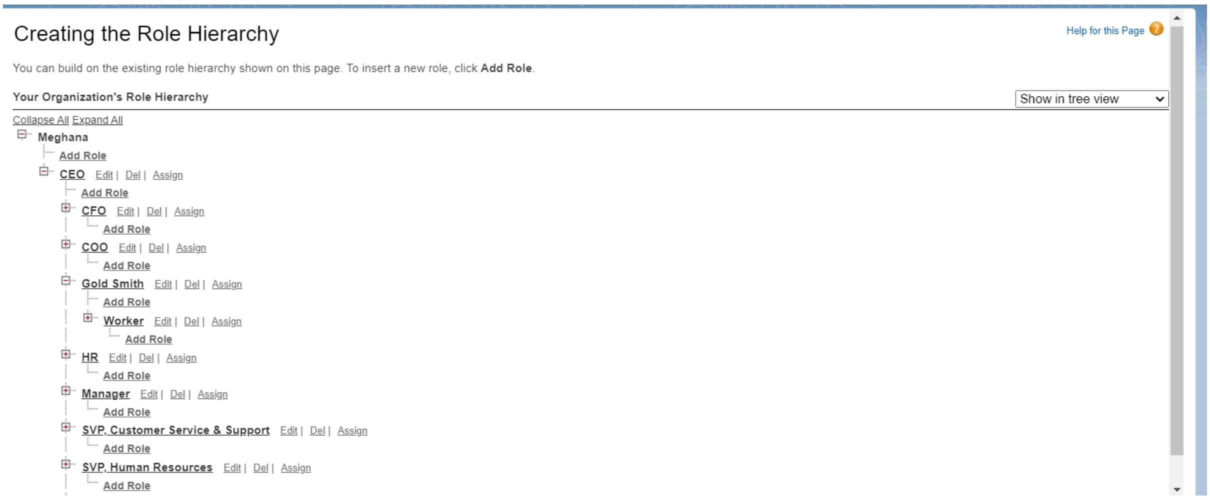


2. Click on Expand All and click on add role under whom this role works.

3. Give Label as "Gold Smith" and Role name gets auto populated. Check to whom this role (Gold Smith) reports. Then click on Save.



8.2 **Create one more role as Worker which reports to Gold Smith.**



9. **Users:**

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access. Each user account contains at least the following:

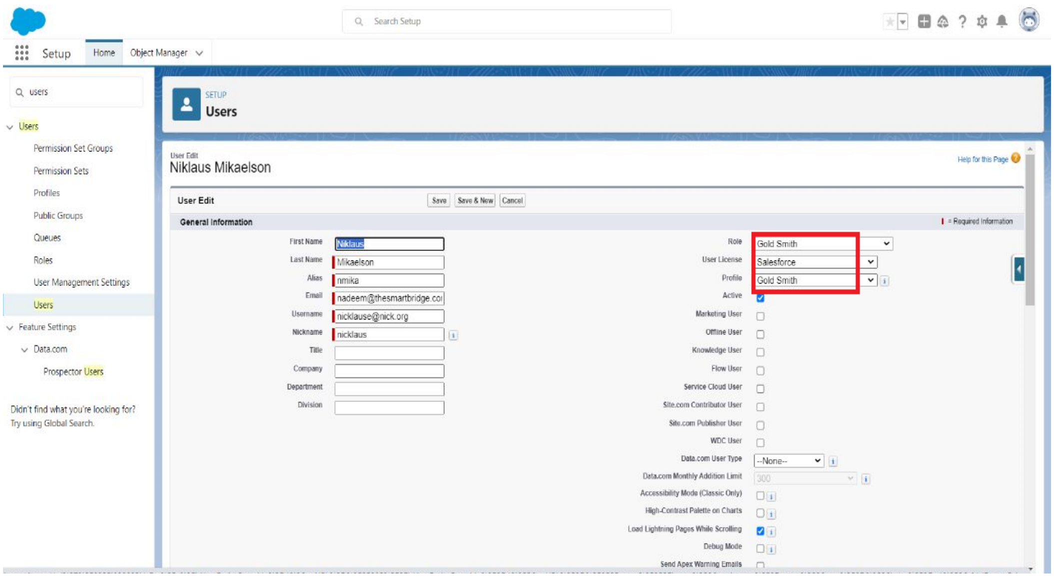
- Username
- Email Address
- User's First Name (optional)
- User's Last Name
- Alias
- Nickname
- Licence
- Profile
- Role (optional)

9.1 **Create User**

Go to setup >> type users in quick find box >> select users >> click New user.

Fill in the fields

1. First Name : Niklaus
2. Last Name : Mikaelson
3. Alias : Give a Alias Name
4. Email id : Give your Personal Email id
5. Username: Username should be in this form: text@text.text
6. Nick Name : Give a Nickname
7. Role : Gold Smith
8. User licence : Salesforce
9. Profiles: Gold Smith



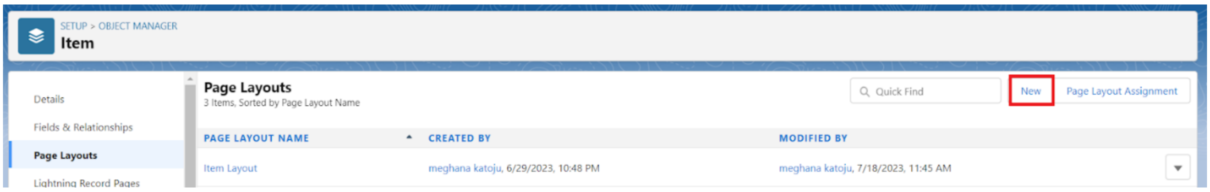
10. Save.
11. Create two more users as mentioned in activity 2 using the same profile.

10. Page layouts

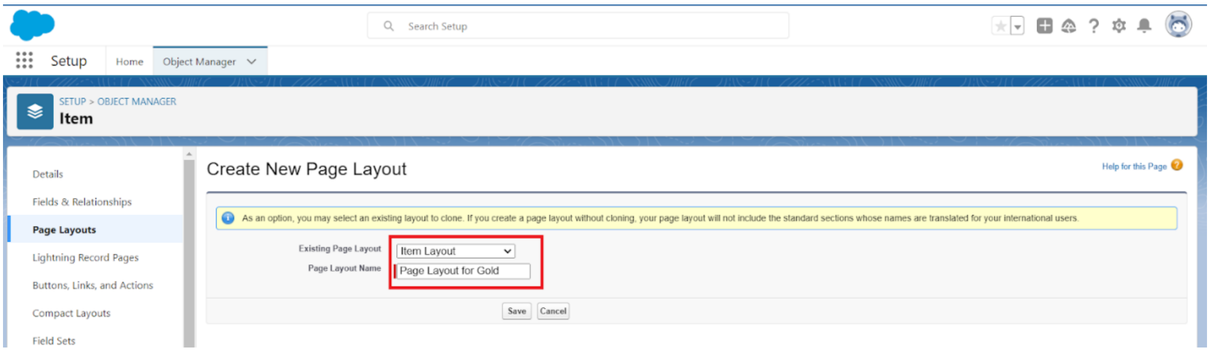
Page Layout in Salesforce allows us to customise the design and organise detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

10.1 **To Create a Gold Page layout**

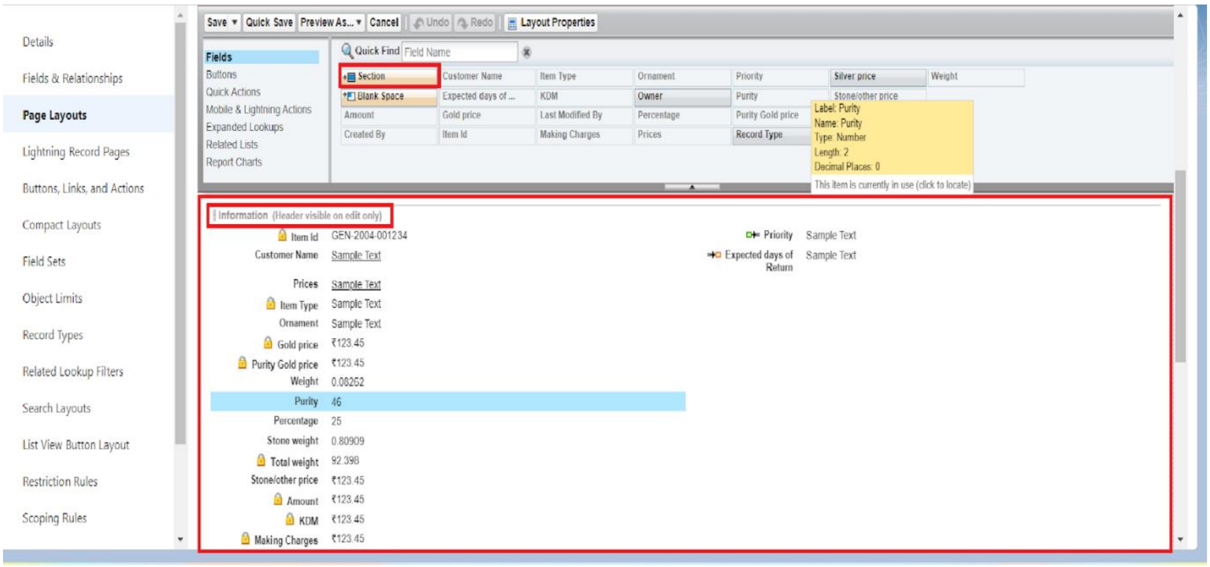
1. Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.
2. Click on Page layout >> Click on New.



3. Give Page layout Name as “Page Layout for Gold” and click on Save and New.



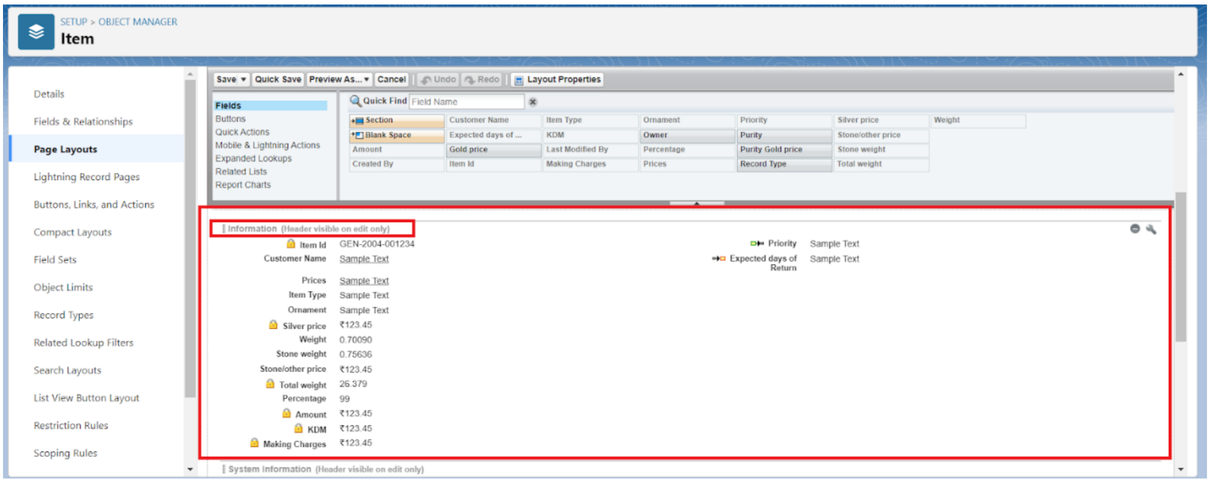
4. Arrange the field as shown in the Information Section ,remove fields which are related to Silver and click Ok.



5. Click Save.
6. Make sure your page layout looks like the picture above.

10.2 **To Create a Silver Page layout**

1. Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.
2. Click on Page layout >> Click on New.
3. Give Page layout Name as “Page Layout for Silver” and click on Save.
4. Arrange the field as shown in the Information Section ,remove fields which are related to Gold and click Ok.

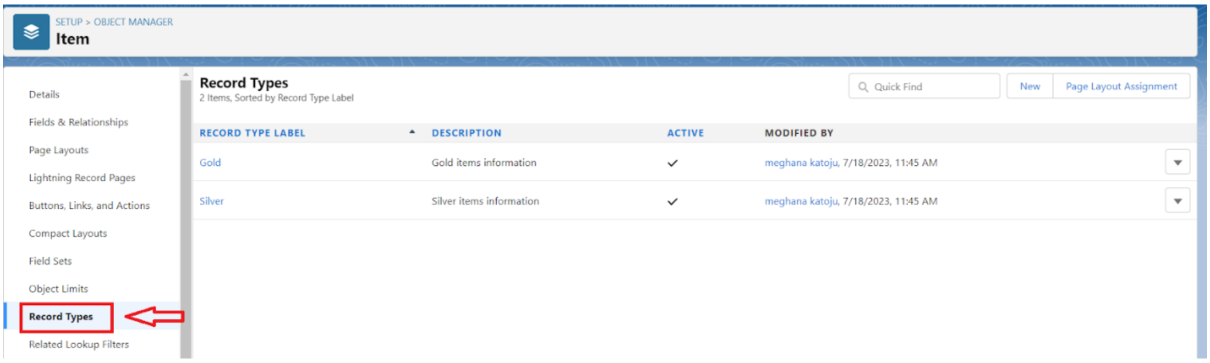


11. Record Types

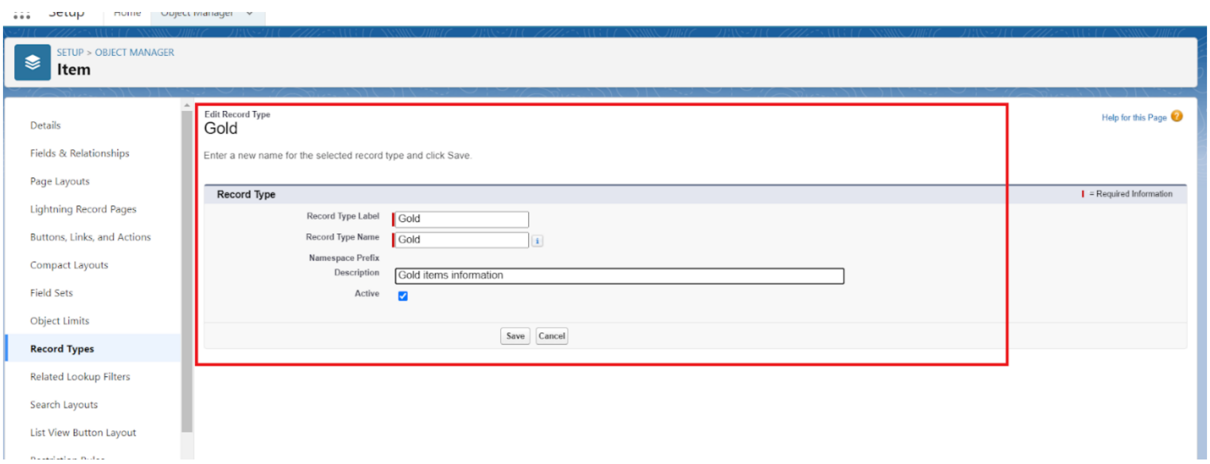
Record Types are a way of grouping many records of one type for that object. These can be applied to any standard or custom object, and allow you to have a different page layout, fields, required fields, and picklist values.

11.1 To create a Record Type

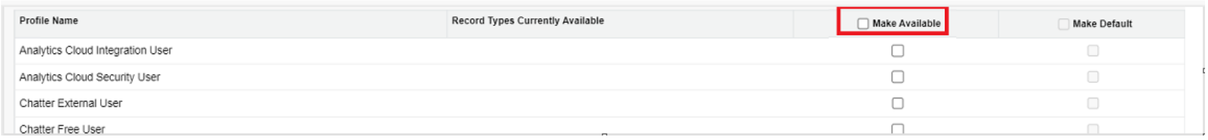
1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
2. Click on the Record Types >> click New.



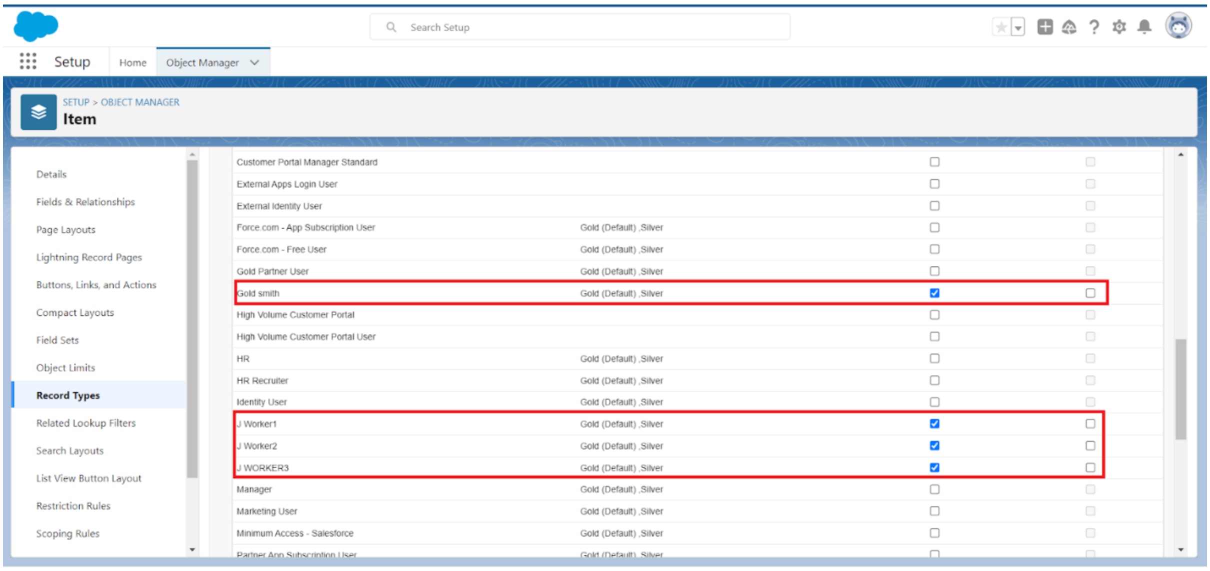
3. Select Existing Record as “Master”,Record type Label as “Gold”,Description as “Gold items information”.



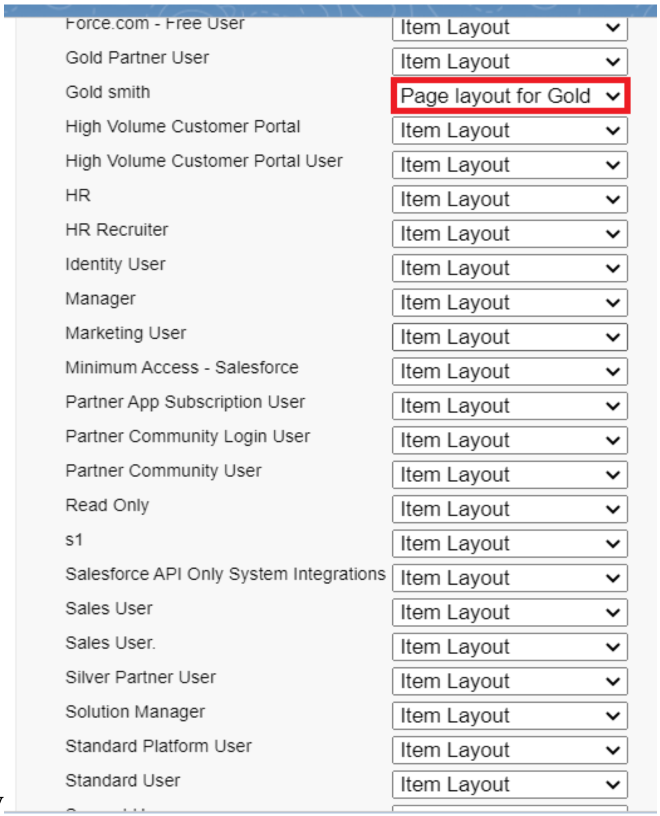
4. Uncheck for “Make Available”.



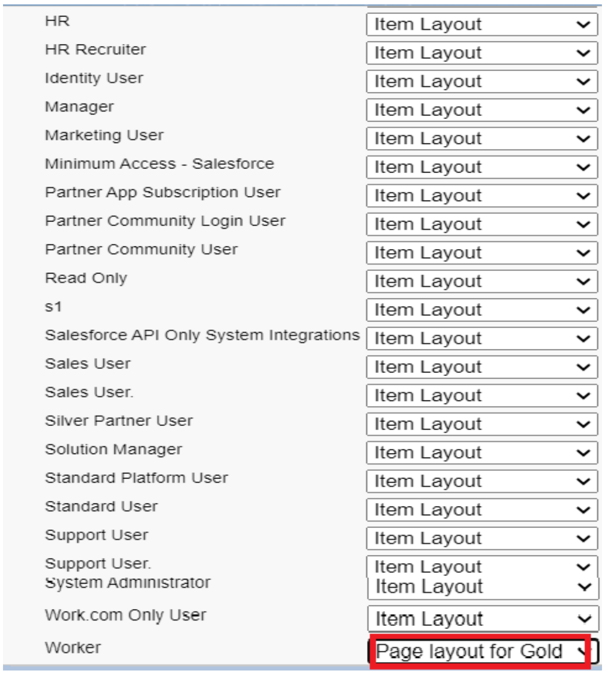
5. Scroll down and check for the Gold Smith,Worker JW & System Administrator profile and click on Next.



6. Select “Apply a different layout for each profile”, and change page layout to “Page Layout for Gold“for Gold Smith,Worker and System Administrator ?



save&new



Activity 2:Create another Record Type with name “Silver” following the steps from Activity1.

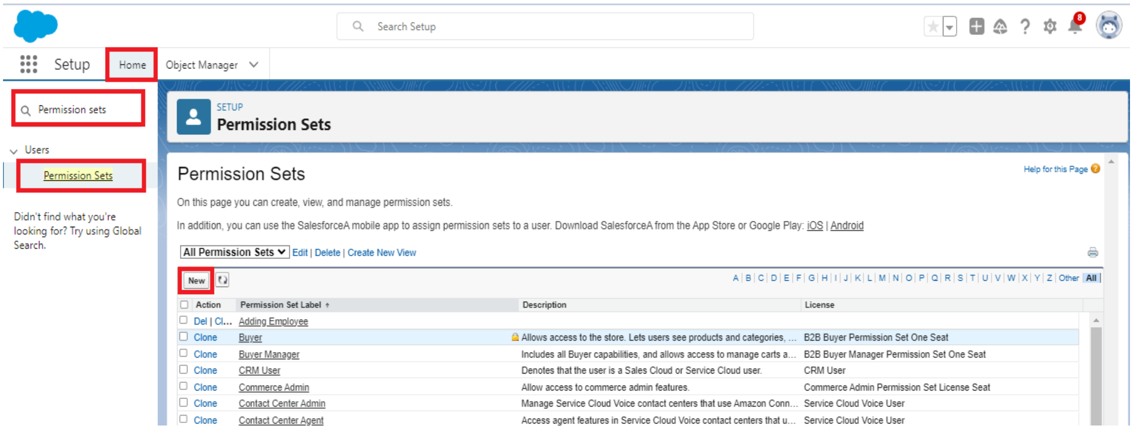
Note: Use page layout for Silver.

12. Permission sets

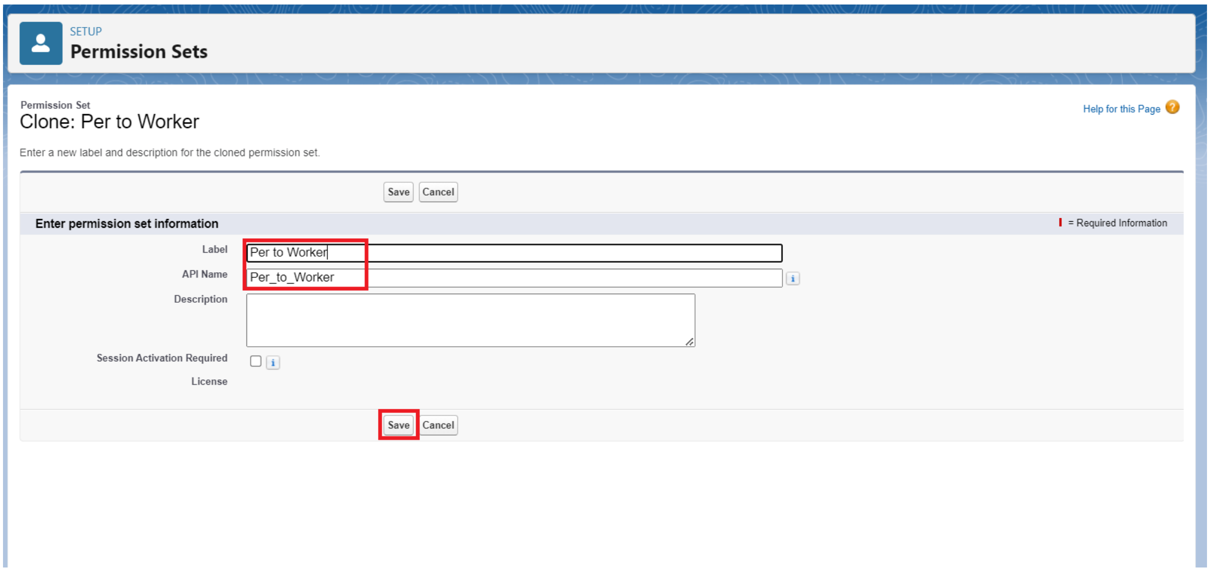
A standard permission set consists of a group of common permissions for a particular feature associated with a permission set licence. Using a standard permission set saves you time and facilitates administration because you don't need to create the custom permission set.

12.1 **Creating permission set**

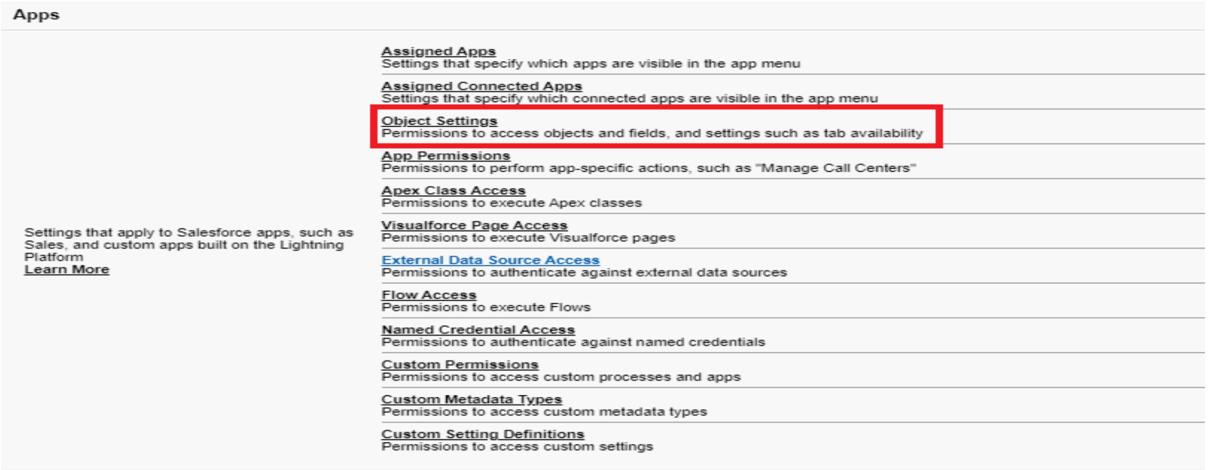
1. Go to setup >> type "permission sets" in quick search >> select permission sets >> New.



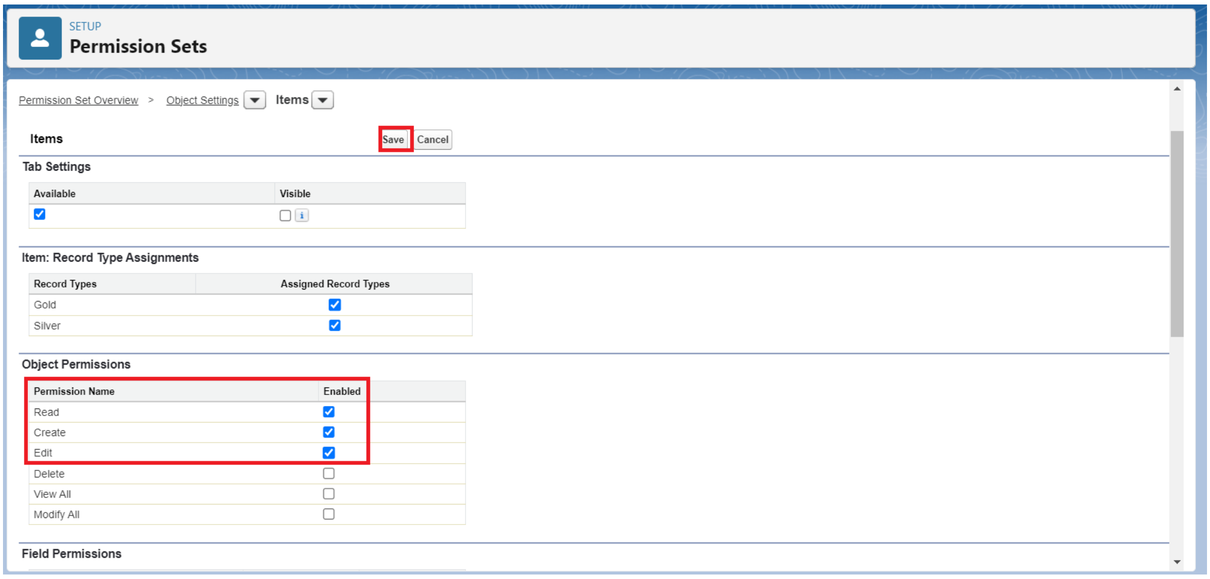
2. Enter the label name as "Per to Worker", API will be auto populated ? save.



3. Under Apps Select object settings.



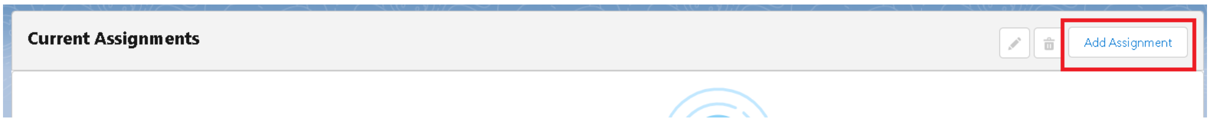
4. Click on Items object ? click on Edit ? under Item:Record Type Assignments,enable Gold,Silver ? Object permission check for read ,edit and create.

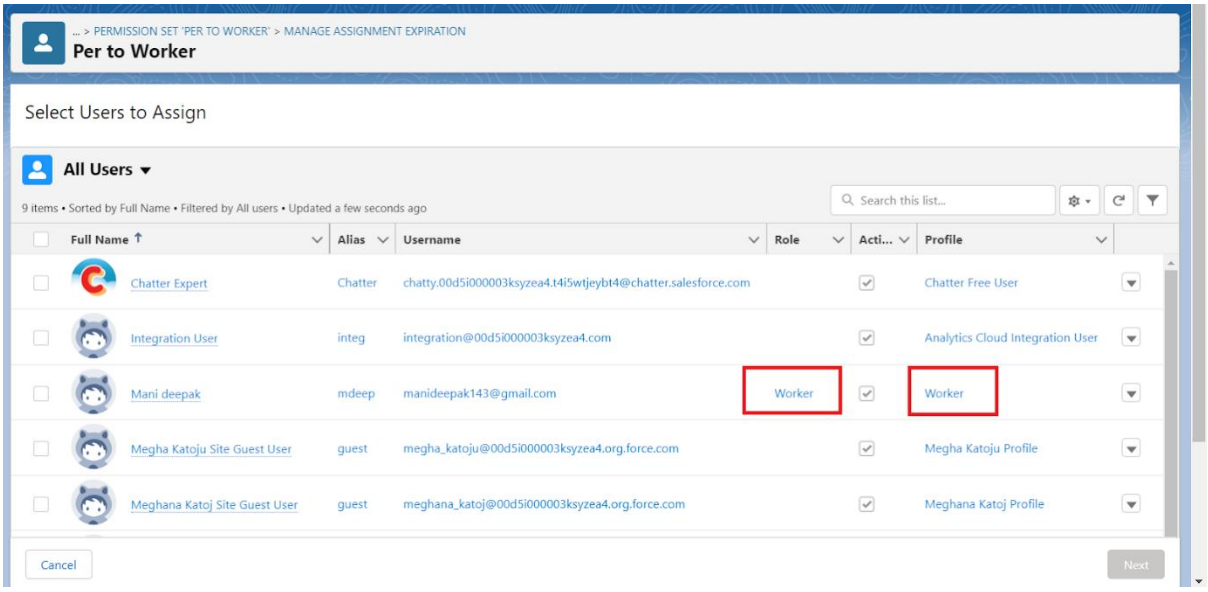


5. Click on Save.

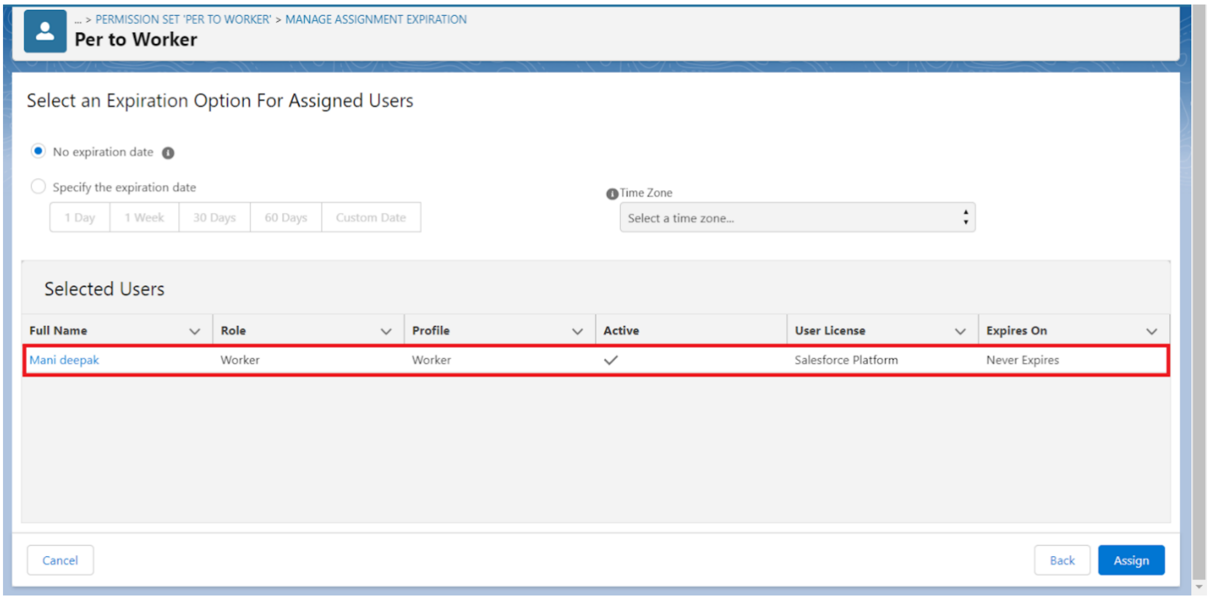
6. After saving the permission click on the Manage assignment

7. Now click on the Add Assignment.





8. Now select the users which you have created in user milestone, using Worker profile and click on Next ? Assign? Done.



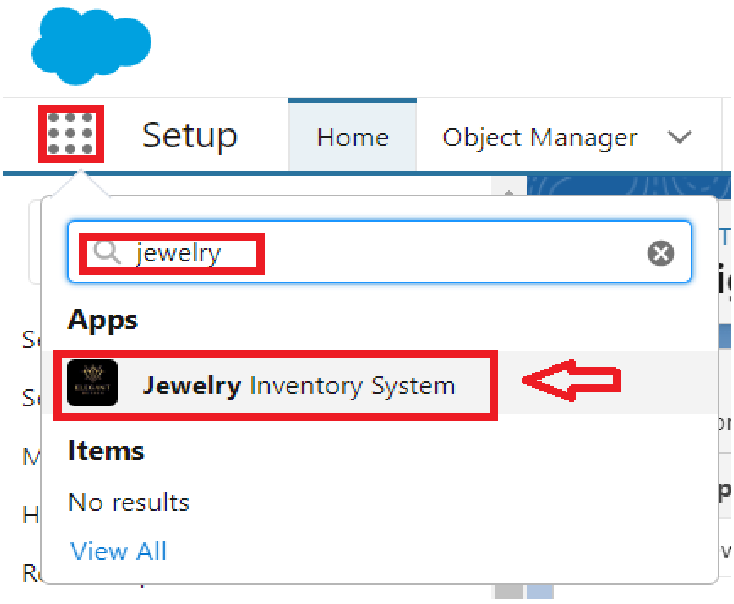
13. Trigger

A standard permission set consists of a group of common permissions for a particular feature associated with a permission set licence. Using a standard permission set saves you time and facilitates administration because you don't need to create the custom permission set.

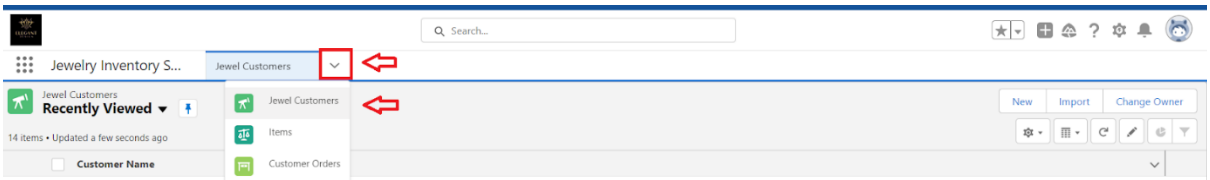
14. User Adoption

14.1 **Create a Record (Jewel Customer)**

1. Click on App Launcher on the left side of the screen.
2. Search Jewelry Inventory System & click on it.



3. Click on Drop Down and Click on the Jewel Customer tab.
4. Click New.



5. Fill the Details and click on Save.

14.2 **View a Record(Jewel Customer)**

1. Click on App Launcher on the left side of the screen.
2. Search Jewelry Inventory System & click on it.
3. Click on the Jewel Customer Tab.
4. Click on any record name. you can see the details of the Jewel Customer.

14.3 **Delete a Record(Jewel Customer)**

1. Click on App Launcher on the left side of the screen.
2. Search Jewelry Inventory System & click on it.

3. Click on the Jewel Customer Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete.

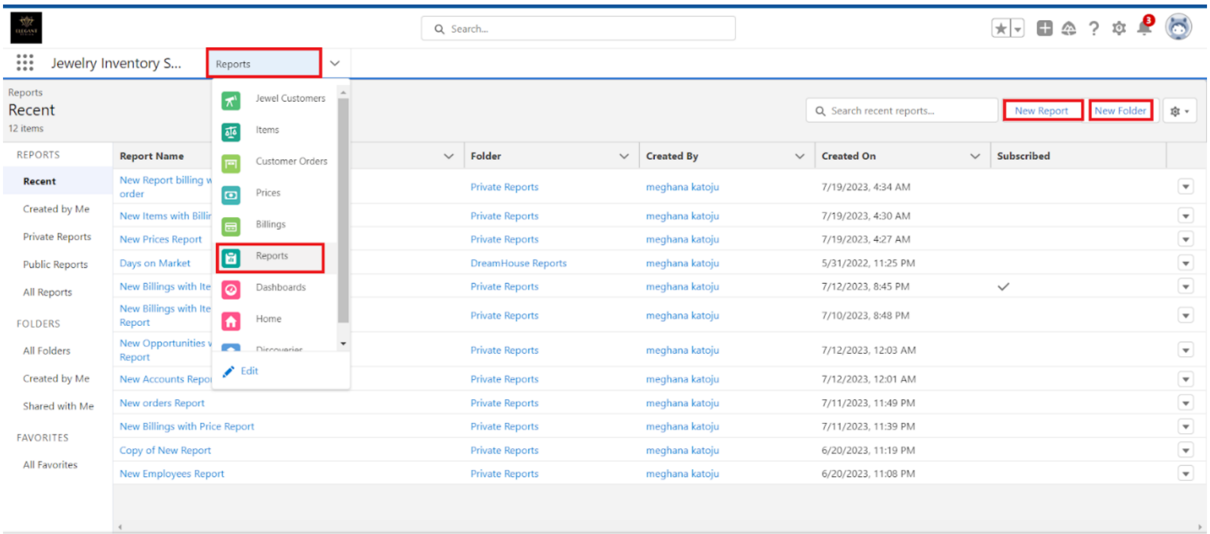
Note:

Create at least 10 records for each of the objects: Jewel Customer,Price,Item,Customer Order and Billing.

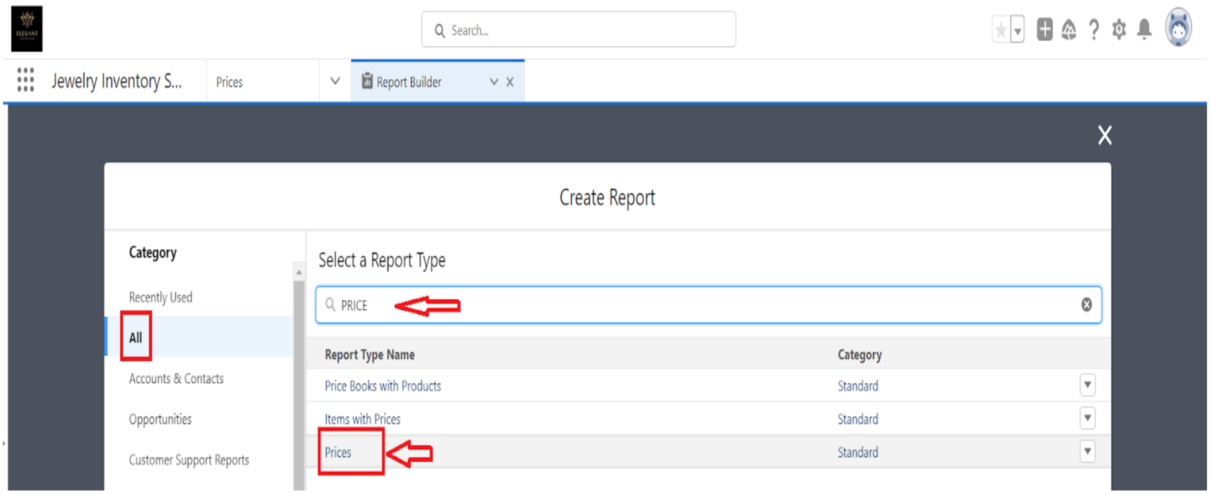
15.Reports

15.1 **Create Report**

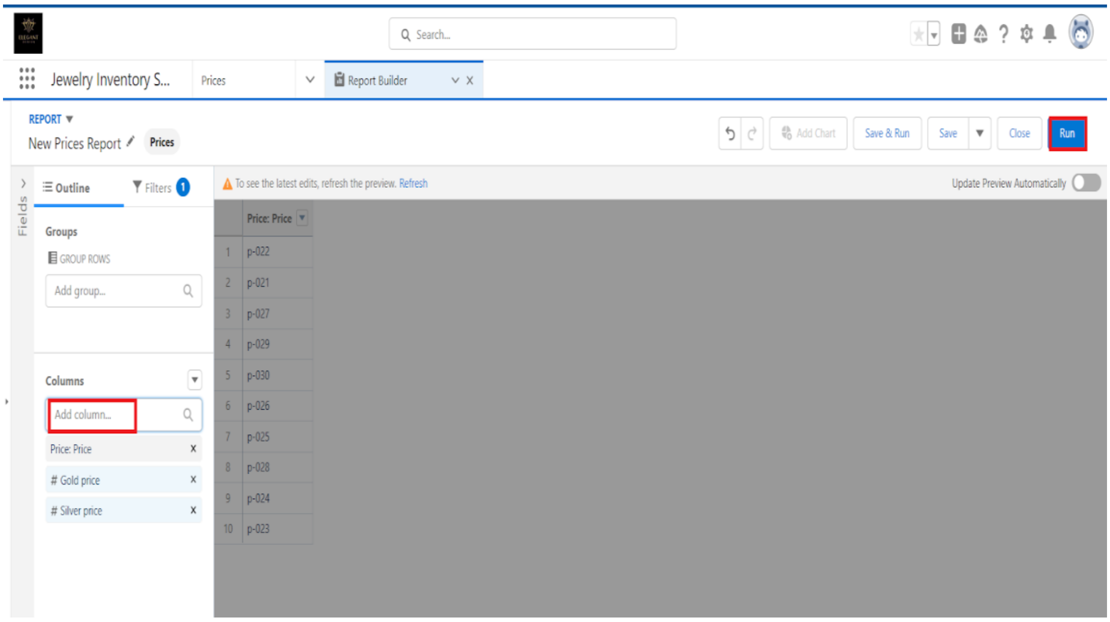
1. Go to the app >> click on the reports tab
2. Click New Report.



3. Select report type from category or from report type panel or from search panel ? click on start report.

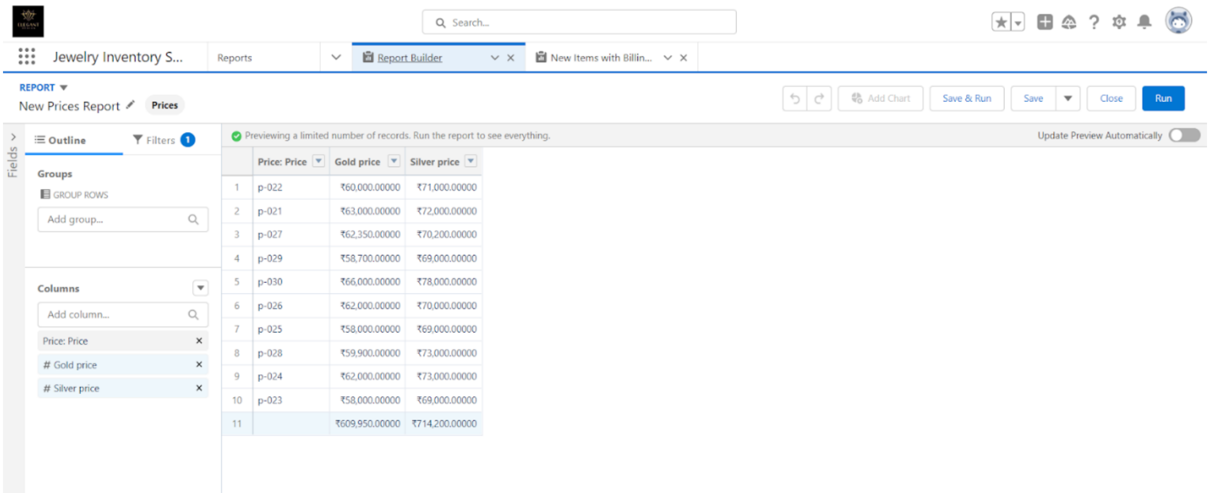


4. Customise your report



- Add fields from the left pane as shown below.

5. Save or run it.



Note: Reports may get varied from the above pictures as the data might be different

15.2 **Reports**

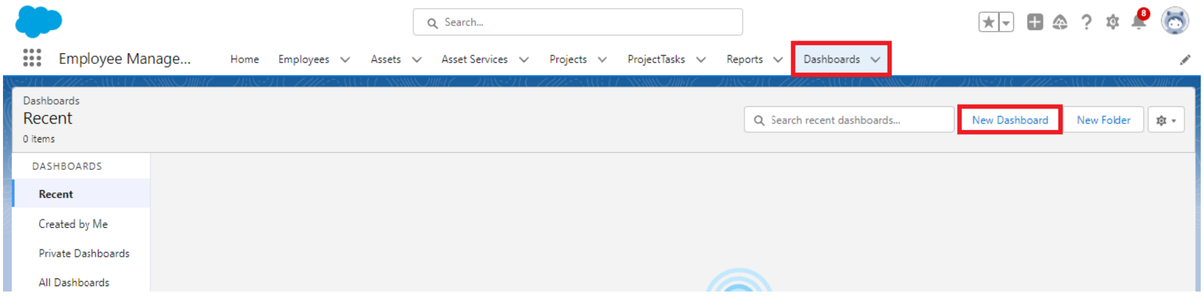
1. Create a report with report type: “Item with Billings”.
2. Create a report with report type: “Billings with item and Customer order”.

16. Dashbords

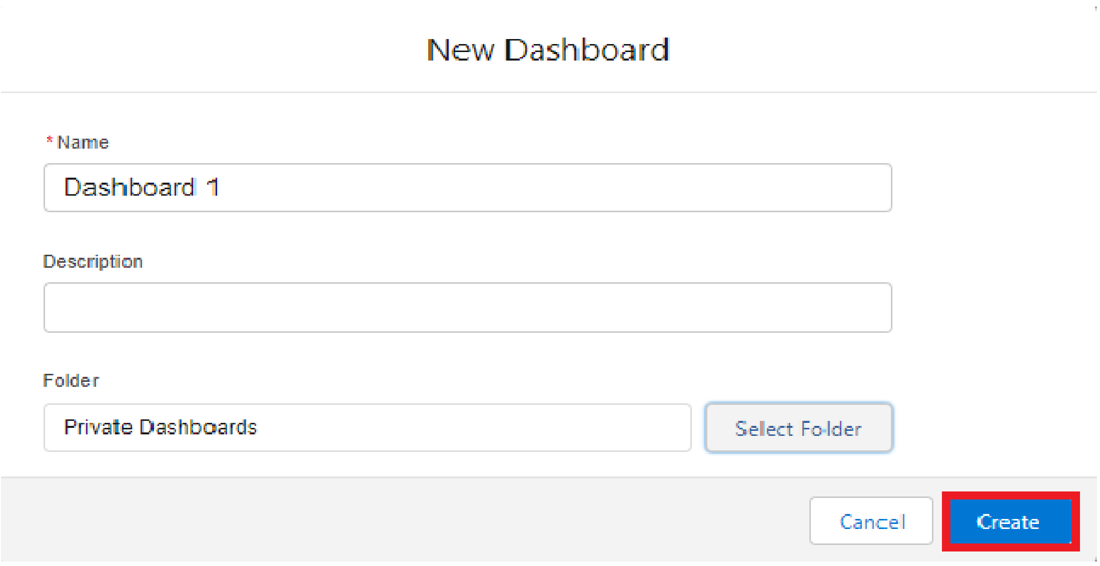
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

16.1 **Create Dashboard**

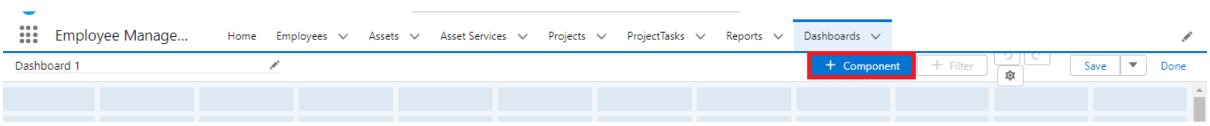
1. Go to the app >> click on the Dashboards tabs.



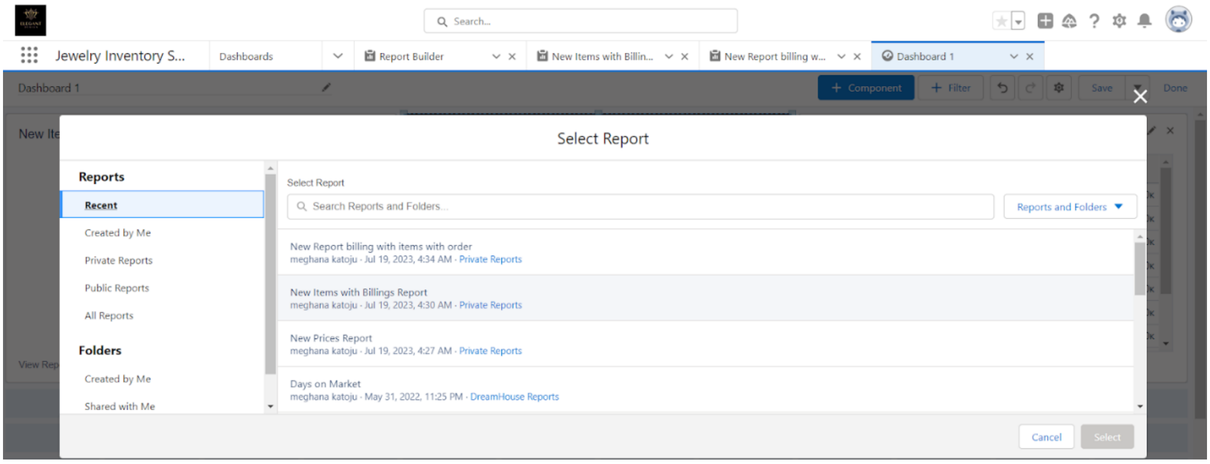
2. Give a Name and click on Create.



3. Select add component.

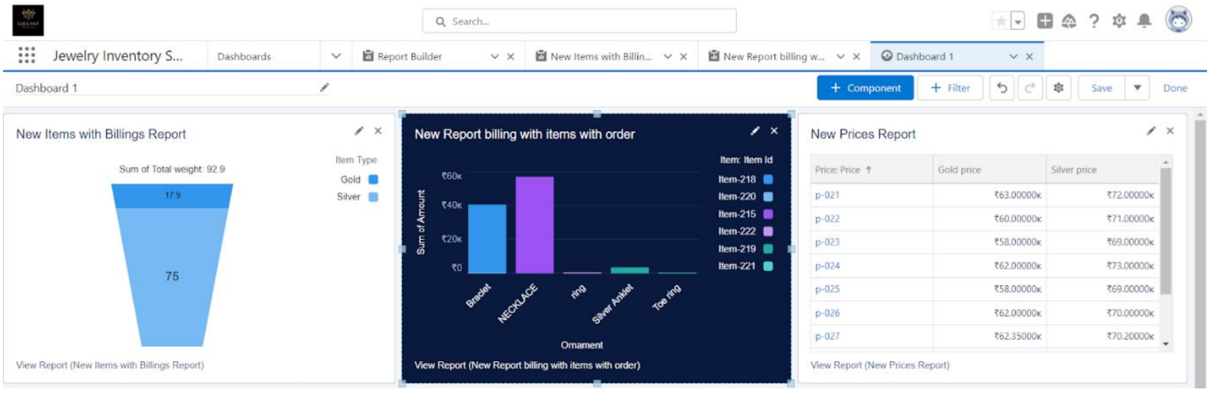


4. Select a Report and click on select.



5. Click Add then click on Save and then click on Done.

Activity 2: Create another Dashboard as we discussed in activity 1.

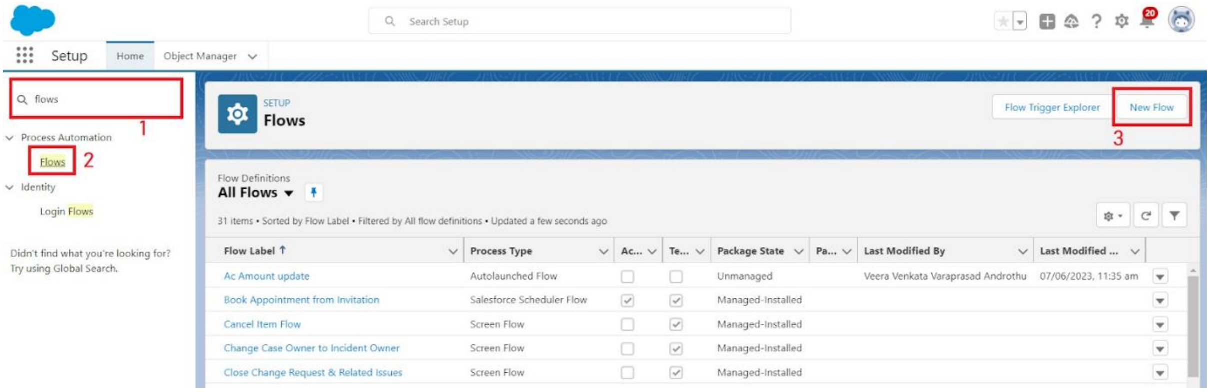


17. Flows

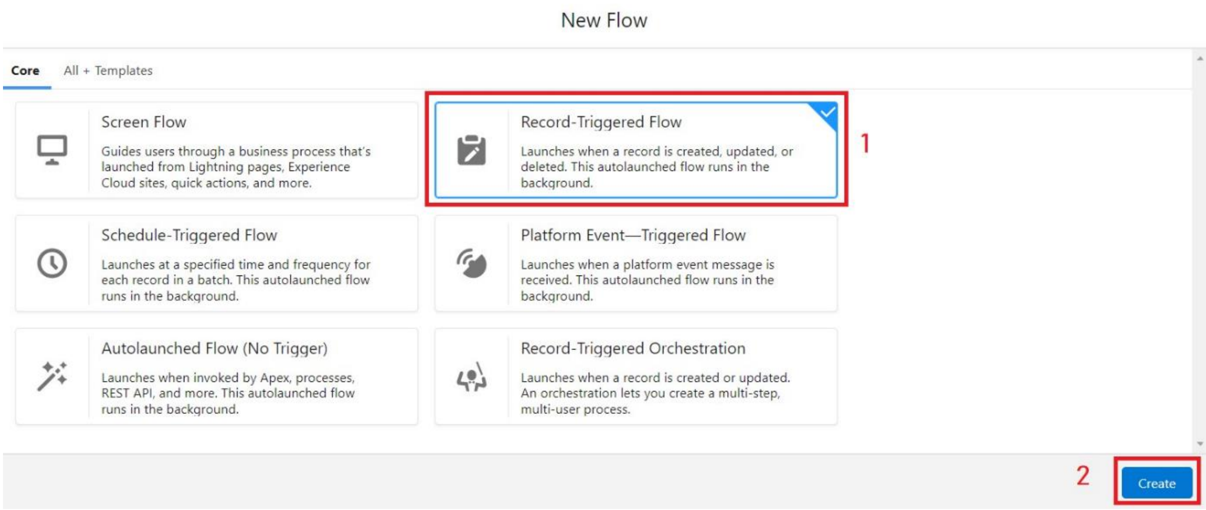
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

17.1

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.



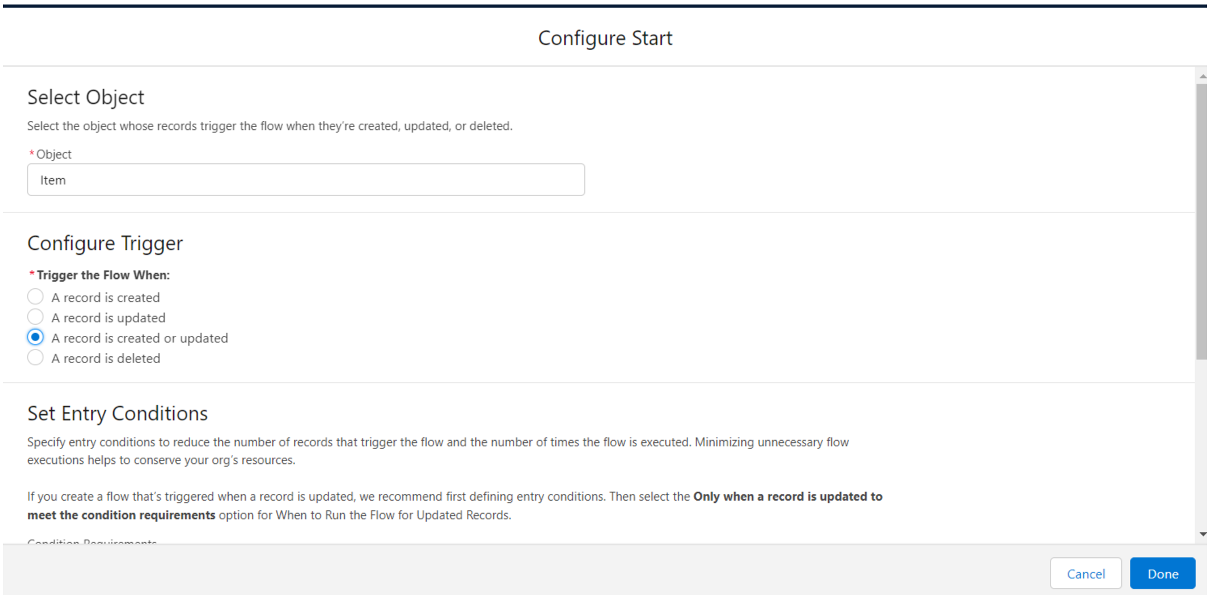
2. Select the Record-triggered flow and Click on Create.



3. Select the Object as a “Billing” in the Drop down list.

4. Select the Trigger Flow when: “A record is Created or Updated”.

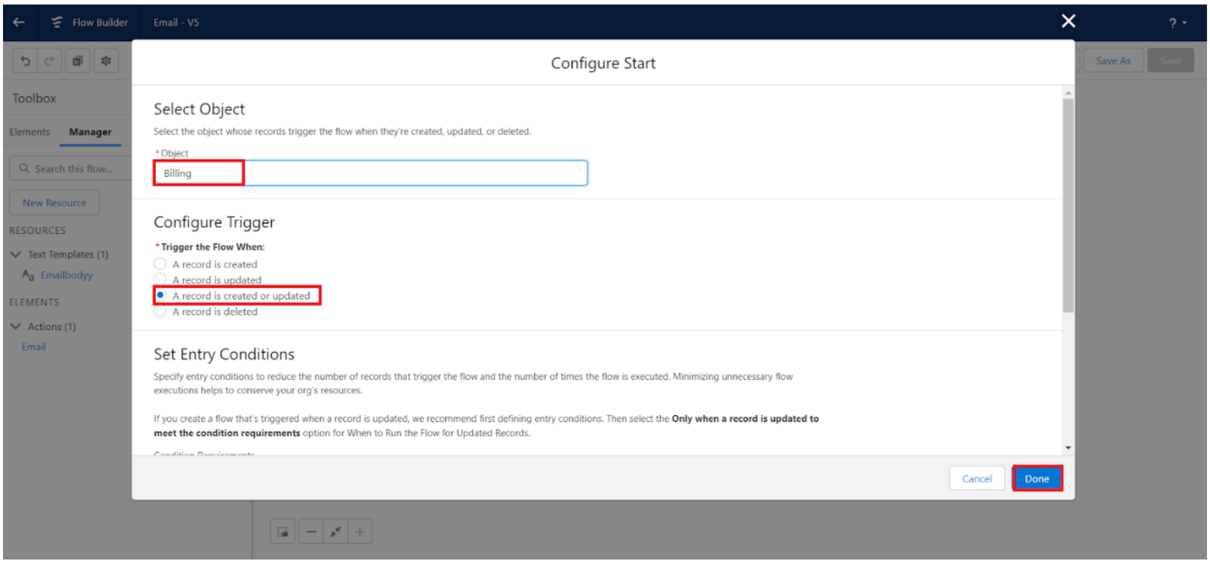
5. Select the Optimise the flow for: “Actions and Related Records” and Click on Done.

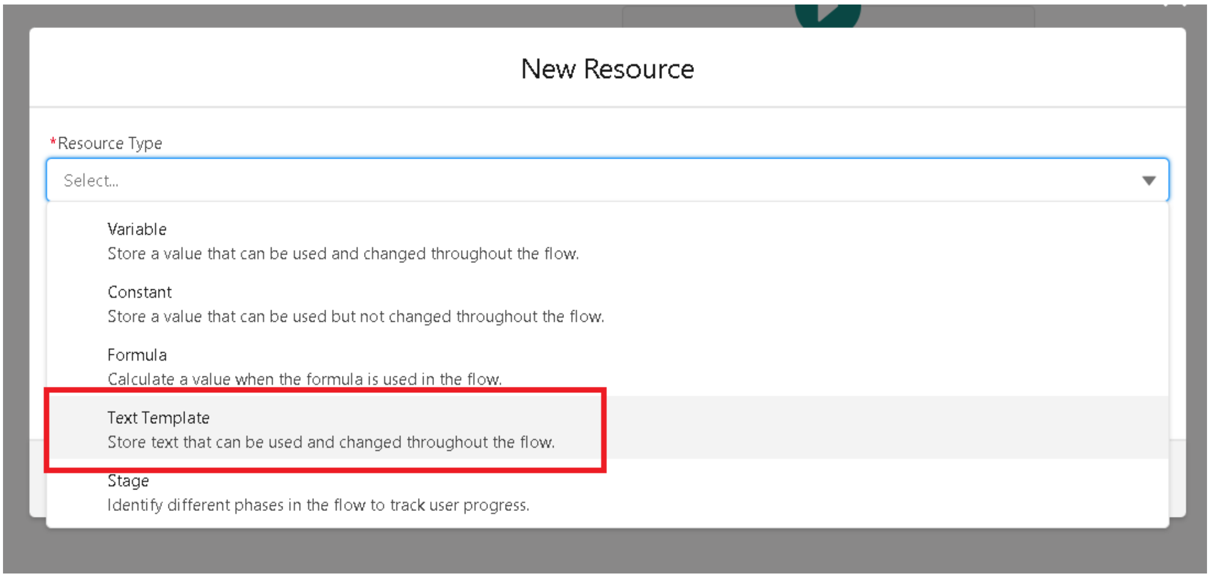


6. Now change the mode form Auto-layout to free-form.

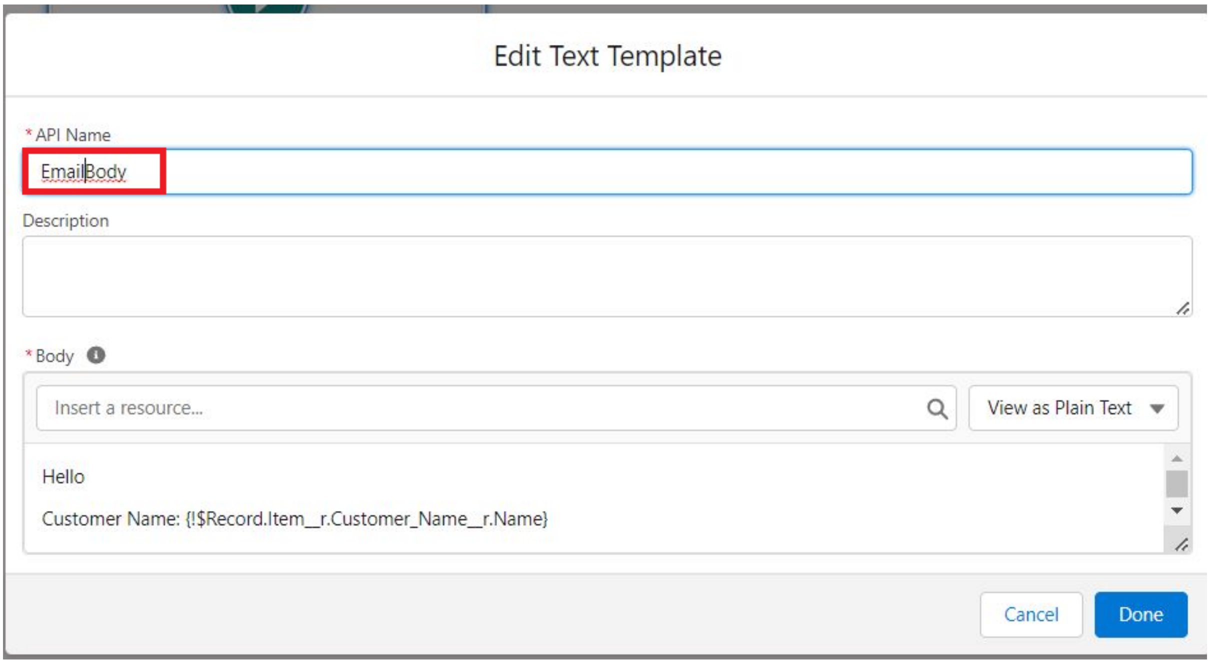
7. Now select the manger option in the toolbox, click New resource.

8. Select the resource type as text template.





9. Enter the API name as " Email body".



10. Change the view as Rich Text ? View to Plain Text.

11. In the body field paste the syntax that is given below.

- Hello
- Customer Name: {!$Record.Item__r.Customer_Name__r.Name}
- Here are the details for the item you purchased with Jewellery Inventory System
- Item Type: {!$Record.Item__r.Item_Type__c}
- Ornament: {!$Record.Ornament__c}
- Weight: {!$Record.Weight__c}grams

Amount: {!$Record.Amount__c}

12. Click done.

13. Now click on elements, and drag the action element into the preview pane.

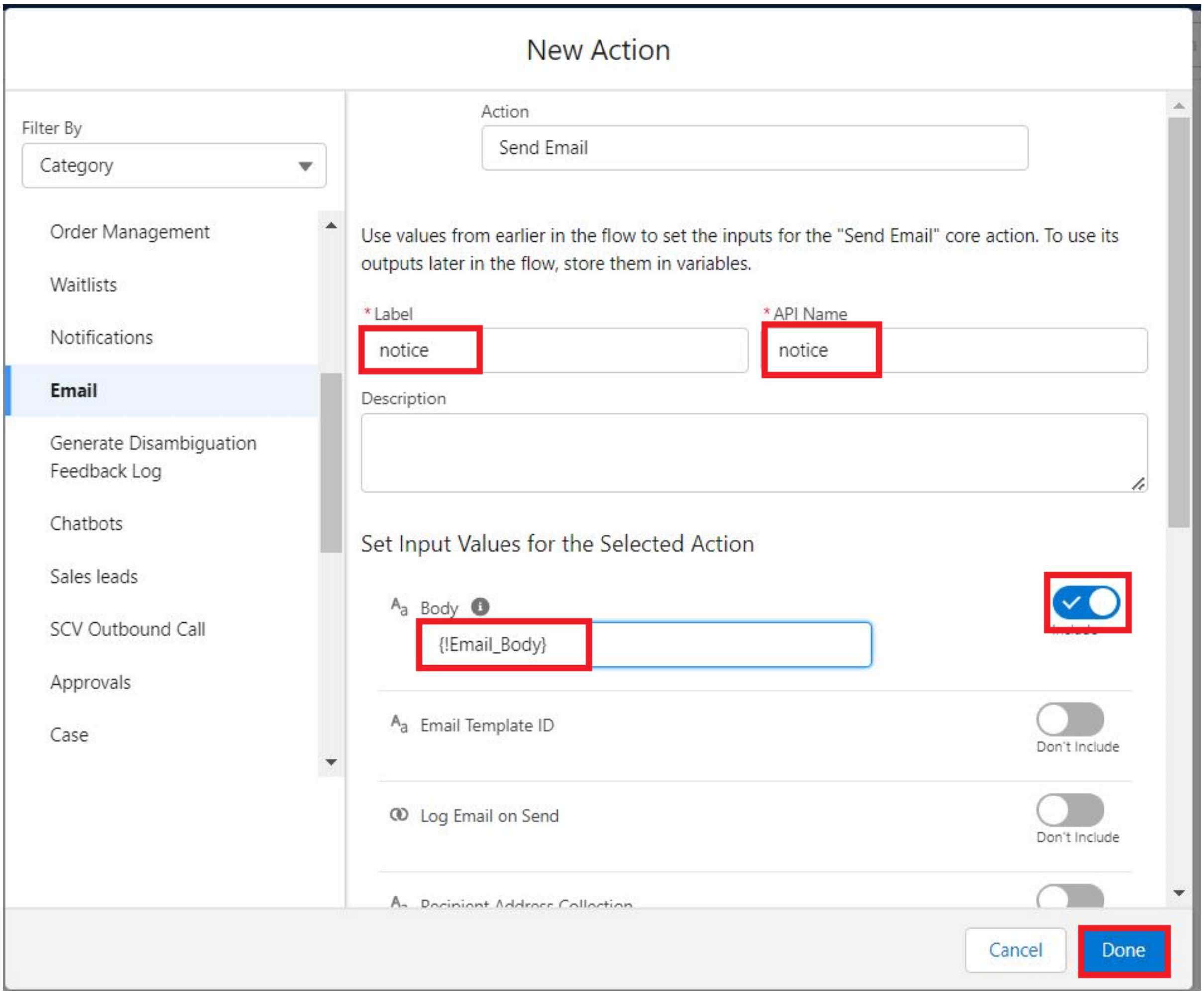
14. Their action bar will be opened in that search for “ send email ” and click on it.

15. Give the label name as “ notice”

16. API name will be auto populated.

17. Enable the body in set input values for the selected action.

18. Select the text template that was created.

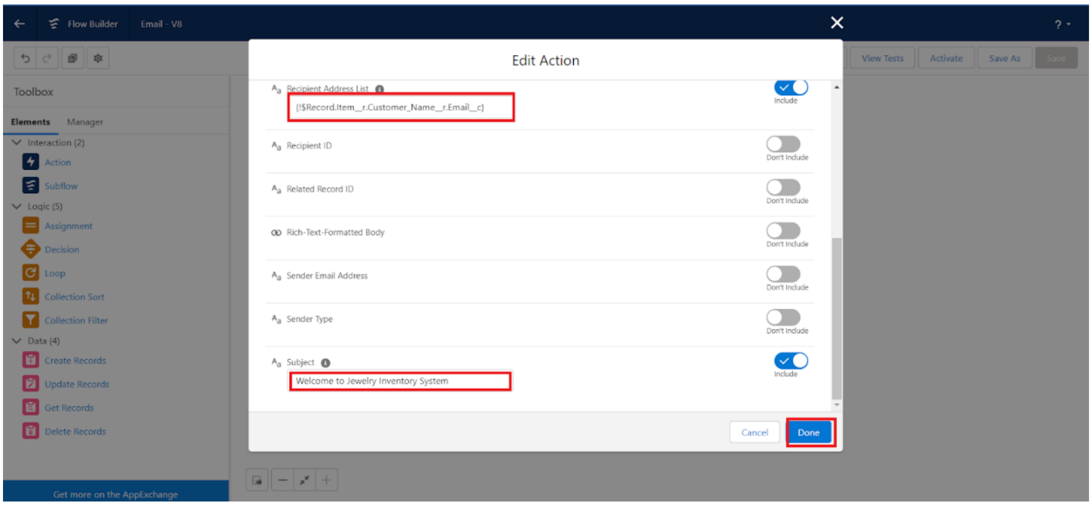


19. Include Recipient Address list, select the email form the record.

({!$Record.Item_r.Customer_Namer.Email_c})

20. Include the subject as “Welcome to Jewelry Inventory System ”.

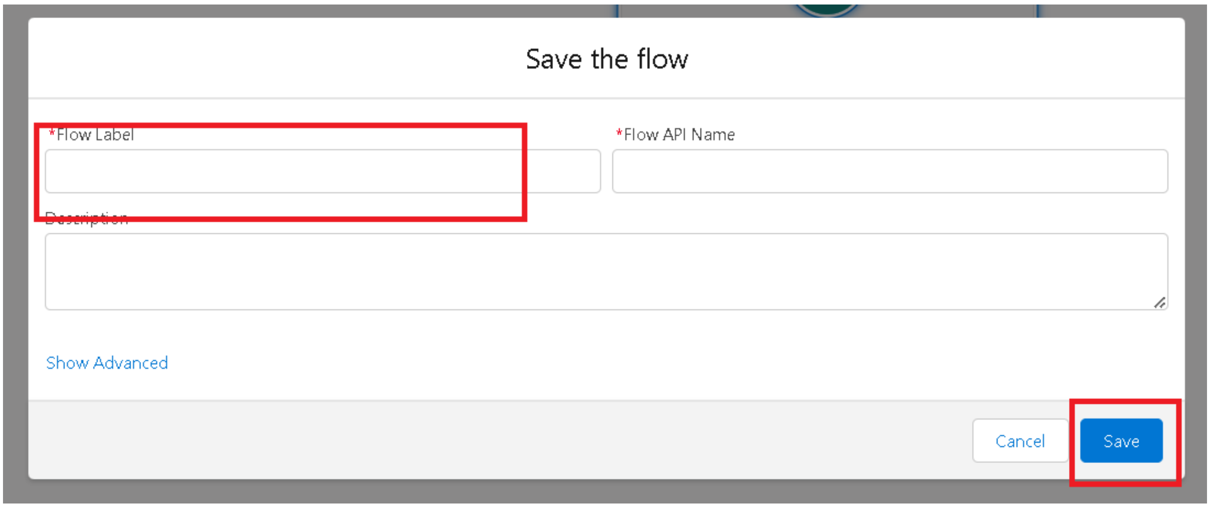
21. Click done.

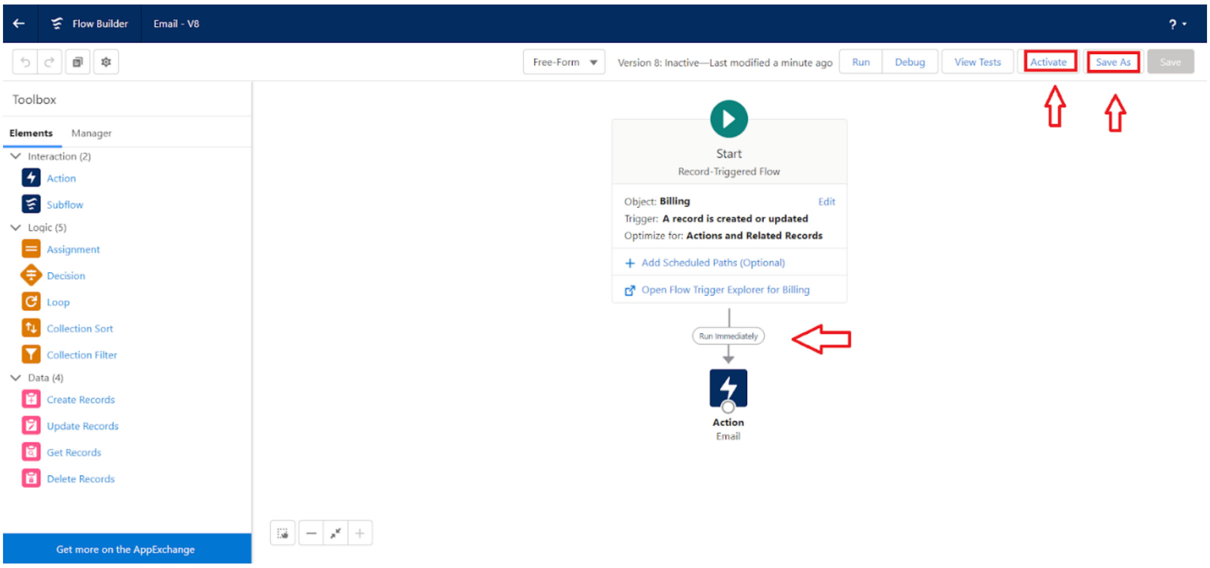


22. Now drag the path from the start to the action element.

23. Click on save. Given the Flow label , Flow Api name will be auto populated.

24. And click save, and click on activate.





18.CONCLUSION

- From a developer's perspective, building a **CRM Application for Jewel Management** provides immense value by streamlining customer relations, automating sales processes, and integrating inventory with client data. It empowers jewel businesses with personalized services, secure data handling, and data-driven decision-making. However, the development process also comes with challenges such as high customization demands, integration complexities, security concerns, and ongoing maintenance.

- Overall, a well-designed CRM for jewel management can serve as a **powerful technological bridge** between jewelers and customers, enhancing business efficiency and customer satisfaction. For developers, it offers both **opportunities to innovate** in a niche industry and **responsibilities to ensure reliability, security, and scalability** of the solution.

For the overview of the project,

I. **Salesforce Login:** **Login | Salesforce**

II. **Smartintenz Task Space:** https://nme.smartinternz.com/