

**PROJECT TITLE:** CRM Application for Jewel Management -  
(Developer)

**College Name:** KPR College of Arts Science and Research

**College Code:**

**TEAM ID:**

**TEAM MEMBERS:**

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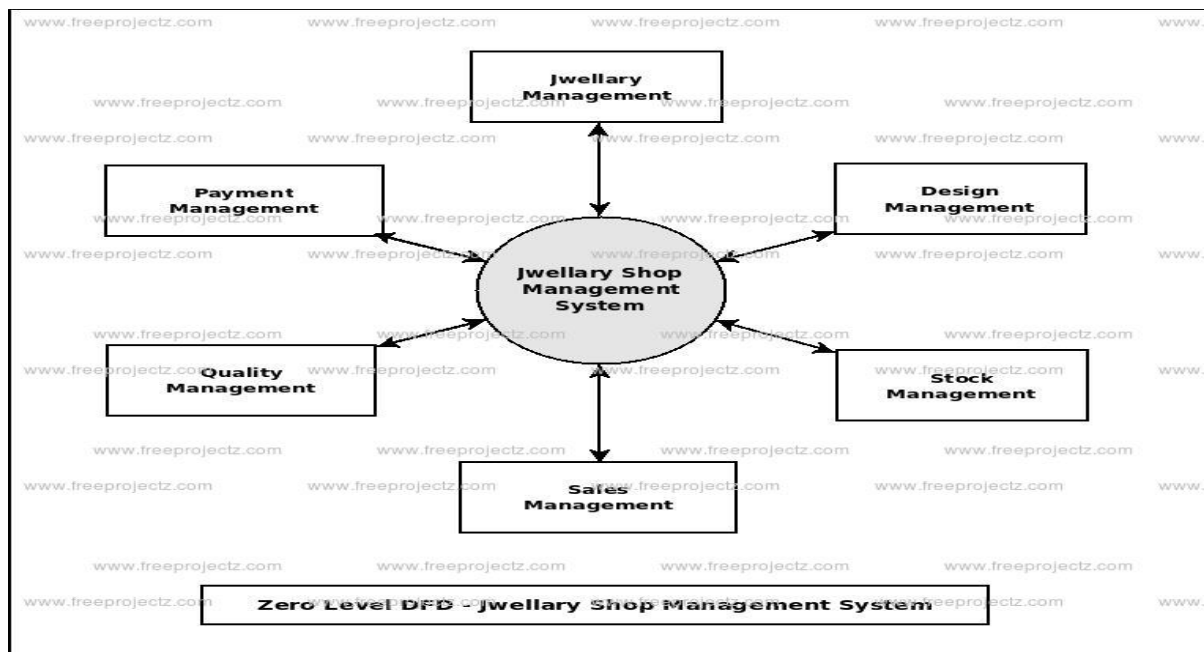
# 1. INTRODUCTION

## 1.1 Project Overview

The **CRM Application for Jewel Management** is a software solution designed to streamline and automate jewelry business operations. It enables efficient management of customer profiles, product catalog, and inventory while tracking sales and generating invoices. The system also provides secure role-based access and real-time reporting, helping businesses reduce manual errors, optimize stock levels, and improve customer engagement.

## 1.2 Purpose

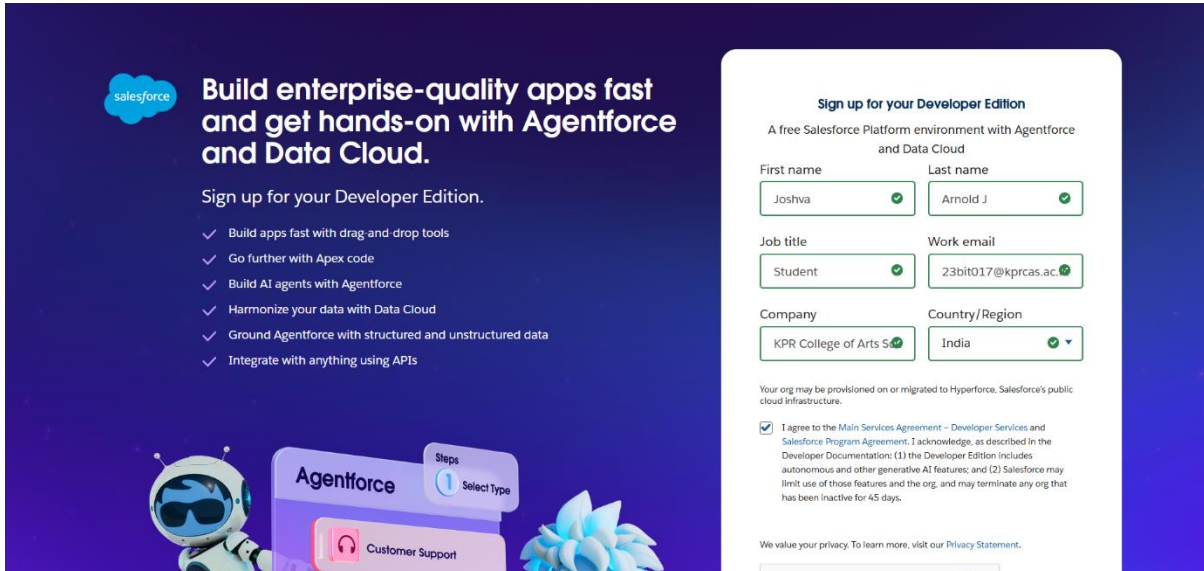
The purpose of this project is to streamline jewelry business operations by centralizing customer management, inventory tracking, and sales processes into a single application. By automating manual tasks, it reduces errors and saves time while providing real-time insights through reporting and analytics. This helps businesses improve customer engagement, optimize stock levels, and make data-driven decisions for increased efficiency and growth.



## 2.DEVELOPMENT PHASE

### 2.1 Creating Developer Account:

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



The image shows the Salesforce Developer Edition sign-up page. On the left, there's a blue background with the Salesforce logo and text: "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists several benefits: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", "Ground Agentforce with structured and unstructured data", and "Integrate with anything using APIs". On the right, there's a white form titled "Sign up for your Developer Edition". It includes fields for "First name" (Joshua), "Last name" (Arnold J), "Job title" (Student), "Work email" (23bit017@kprcas.ac), "Company" (KPR College of Arts S), and "Country/Region" (India). There's a checkbox for "I agree to the Main Services Agreement" and a link to the "Privacy Statement".

**Sign up for your Developer Edition**

A free Salesforce Platform environment with Agentforce and Data Cloud

First name: Joshua Last name: Arnold J

Job title: Student Work email: 23bit017@kprcas.ac

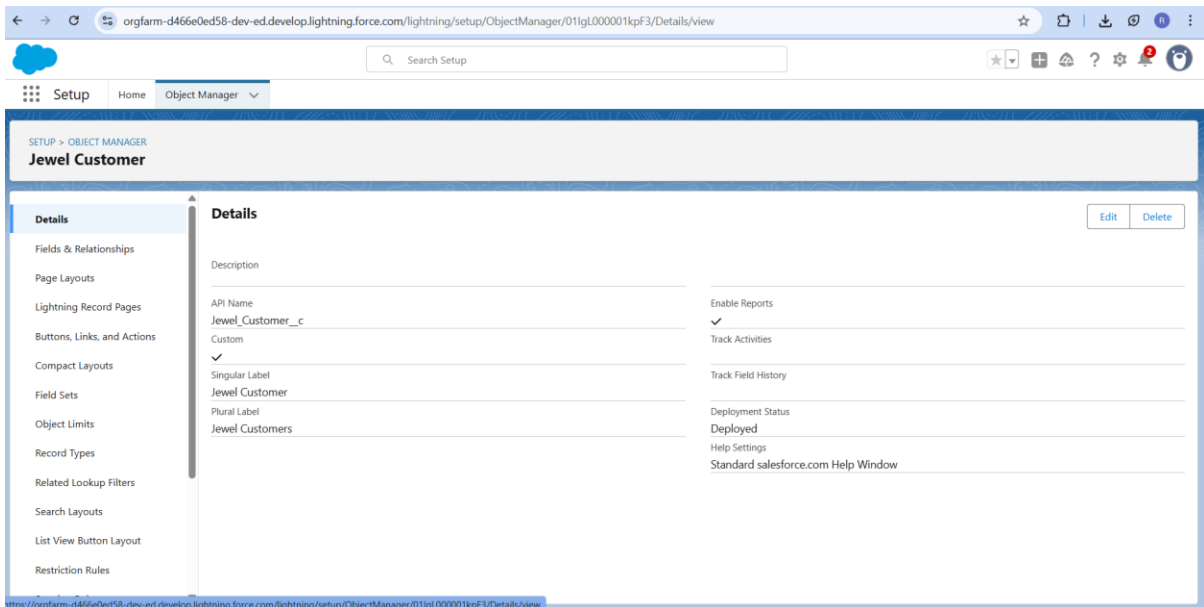
Company: KPR College of Arts S Country/Region: India

☒ 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](#).

### 2.2 Created Custom Objects.

- Jewel Customer:



The image shows the Salesforce Object Manager page for a custom object named "Jewel Customer". The page is titled "Jewel Customer" and has a "Details" tab selected. The "Details" section shows the following information: "Description" (empty), "API Name" (Jewel\_Customer\_\_c), "Custom" (checked), "Singular Label" (Jewel Customer), "Plural Label" (Jewel Customers), "Enable Reports" (checked), "Track Activities" (checked), "Track Field History" (checked), "Deployment Status" (Deployed), and "Help Settings" (Standard salesforce.com Help Window). The left sidebar shows a navigation menu with options like "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", and "Restriction Rules".

**Setup > OBJECT MANAGER**

**Jewel Customer**

**Details**

Description

API Name: Jewel\_Customer\_\_c

Custom

Singular Label: Jewel Customer

Plural Label: Jewel Customers

Enable Reports: ☒

Track Activities: ☒

Track Field History: ☒

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

[Edit](#) [Delete](#)

- Item :

Cloud logo

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

### Item

**Details**

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

**Details**

EditDelete

Description	
API Name	Item_c
Custom	✓
Singular Label	Item
Plural Label	Items
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

➤ Order Item :

Cloud logo

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

### Order

**Details**

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

**Details**

EditDelete

Description	
API Name	Order_c
Custom	✓
Singular Label	Order
Plural Label	Orders
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

➤ Price :

The screenshot shows the Salesforce Setup interface for the 'Price' object. The breadcrumb trail is 'SETUP > OBJECT MANAGER'. The left sidebar lists various configuration options, with 'Details' selected. The main content area displays the following details for the 'Price' object:

Field	Value
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

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

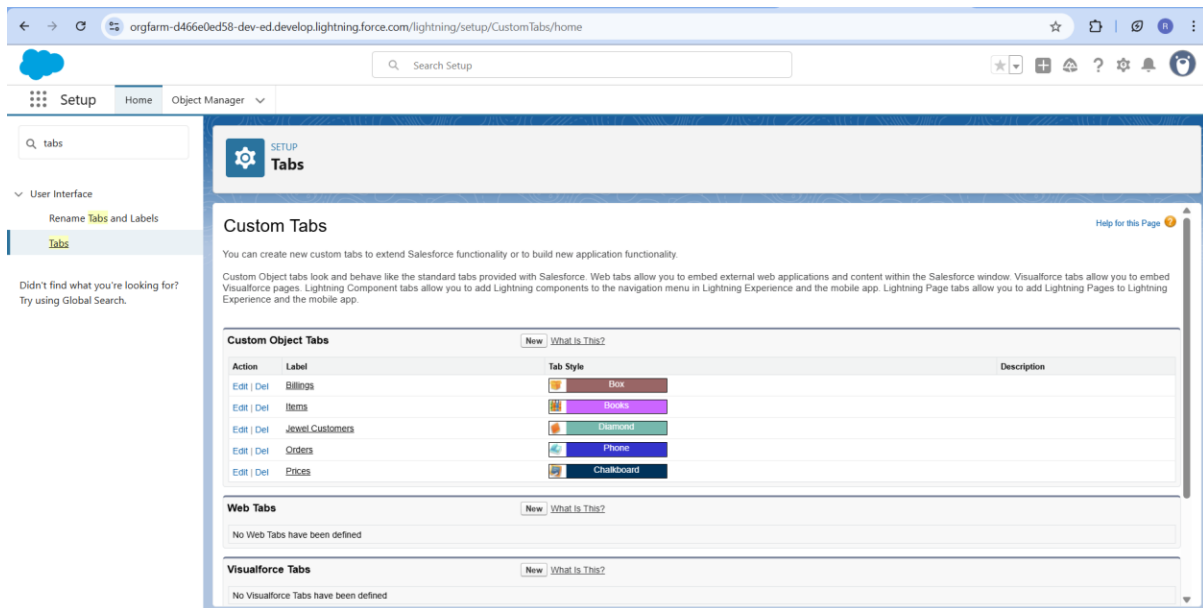
## ➤ Billing:

The screenshot shows the Salesforce Setup interface for the 'Billing' object. The breadcrumb trail is 'SETUP > OBJECT MANAGER'. The left sidebar lists various configuration options, with 'Details' selected. The main content area displays the following details for the 'Billing' object:

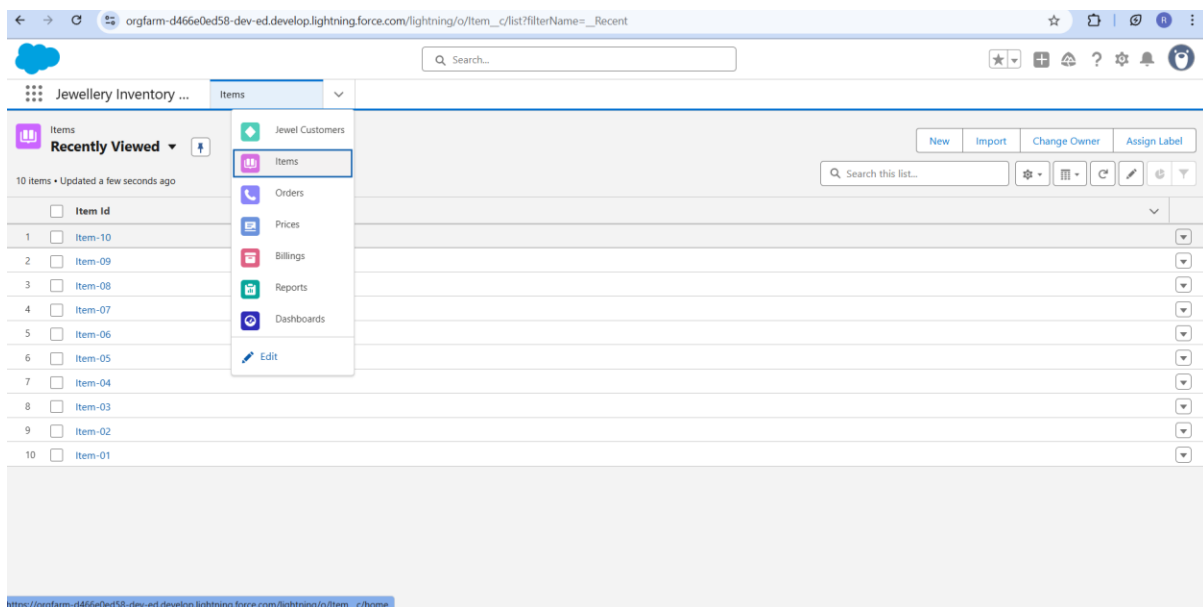
Field	Value
Description	
API Name	Billing__c
Custom	✓
Singular Label	Billing
Plural Label	Billings
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

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

## 2.3 Created Tabs for custom objects.



## 2.4 Developed Lightning App with relevant tabs.



## 2.5 Configured fields and relationships.

➤ Jewel Customer:

Setup | Home | Object Manager

SETUP > OBJECT MANAGER  
**Jewel Customer**

Details | **Fields & Relationships** | Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

11 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Country	Country__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Customer	Name	Text(80)		✓
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
State	State__c	Text(20)		
Street	Street__c	Text(20)		

➤ Order :

Setup | Home | Object Manager

SETUP > OBJECT MANAGER  
**Order**

Details | **Fields & Relationships** | Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

6 Items, Sorted by Field Label

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

➤ Order Item :

orgfarm-d466e0ed58-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gl000001kpzp/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Item**

Details

**Fields & Relationships**  
23 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Customer	Customer__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)		
Last Modified By	LastModifiedById	Lookup(User)		

➤ Price:

orgfarm-d466e0ed58-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gl000001kqKn/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Price**

Details

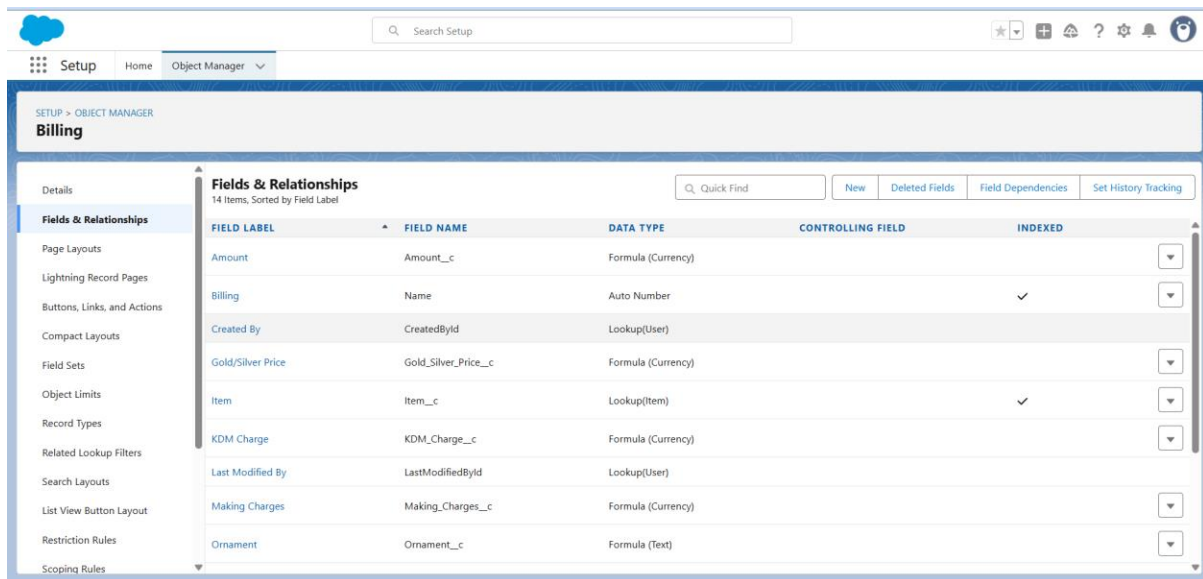
**Fields & Relationships**  
6 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Gold Price	Gold_Price__c	Currency(8, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Price	Name	Auto Number		✓
Silver Price	Silver_Price__c	Currency(8, 5)		

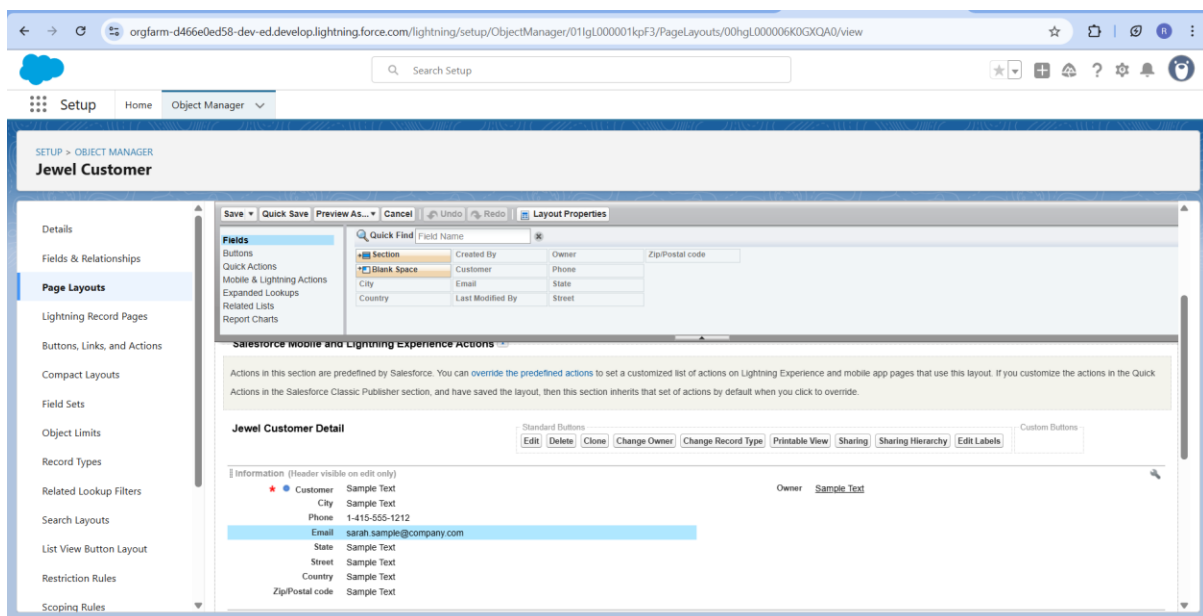
➤ Billing:





## 2.6 Customizing Page Layout.

### ➤ Jewel Customer Layout:



### ➤ Purchase Order Layout:

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

## Order

Details

Fields & Relationships

**Page Layouts**

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Section

Blank Space

Item

Last Modified By

Created By

Customer

Order

Order Status

Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override:

**Order Detail**

Standard Buttons

Edit Delete Clone Change Owner Change Record Type Printable View Edit Labels

Custom Buttons

Information (Header visible on edit only)

Order GEN-2004-001234

Customer Sample Text

Item Sample Text

Order Status Sample Text

System Information (Header visible on edit only)

Created By Sample Text

Last Modified By Sample Text

Custom Links (Header visible on edit only)

**Mobile Cards (Salesforce mobile only)**

## ➤ Order Item Layout:

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

## Item

Details

Fields & Relationships

**Page Layouts**

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Section

Blank Space

Customer

Item Type

Ornament

Priority

Silver Price

Weight

Expected Days Of ...

KDM

Owner

Purity

Stone/Other Price

Amount

Gold Price

Last Modified By

Percentage

Purity Gold Price

Stone Weight

Created By

Item Id

Making Charges

Price

Record Type

Total Weight

**Item Detail**

Edit Delete Clone Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels

Information (Header visible on edit only)

Item Id GEN-2004-001234

Owner Sample Text

Customer Sample Text

Price Sample Text

Item Type Sample Text

Ornament Sample Text

Gold Price \$123.45

Purity Gold Price \$123.45

Weight 0.79576

Purity 73

Percentage 70

Stone Weight 0.96430

Total Weight 96.744

Stone/Other Price \$123.45

Amount \$123.45

KDM \$123.45

**Setup**

Home

Object Manager

SETUP > OBJECT MANAGER

**Item**

Save

Quick Save

Preview As...

Cancel

Undo

Redo

Layout Properties

Quick Find

Field Name

Section

Blank Space

Expected Days Of...

Amount

Created By

Customer

KDM

Gold Price

Item Id

Item Type

Ornament

Owner

Last Modified By

Making Charges

Price

Priority

Purity

Parity Gold Price

Record Type

Silver Price

Stone/Other Price

Stone Weight

Total Weight

Weight

Item Detail

Edit

Delete

Clone

Change Owner

Change Record Type

Printable View

Sharing

Sharing Hierarchy

Edit Labels

Custom Buttons

Information (Header visible on edit only)

Item Id

Customer

Price

Item Type

Ornament

Silver Price

Weight

Stone Weight

Stone/Other Price

Total Weight

Percentage

Amount

KDM

Making Charges

GEN-2004-001234

Sample Text

Sample Text

Sample Text

Sample Text

69.037

0.49699

0.28669

\$123.45

19.233

52

\$123.45

\$123.45

\$123.45

Owner

Sample Text

## ➤ Price Layout:

**Setup**

Home

Object Manager

SETUP > OBJECT MANAGER

**Price**

Save

Quick Save

Preview As...

Cancel

Undo

Redo

Layout Properties

Quick Find

Field Name

Section

Blank Space

Last Modified By

Owner

Price

Gold Price

Silver Price

Price Detail

Edit

Delete

Clone

Change Owner

Change Record Type

Printable View

Sharing

Sharing Hierarchy

Edit Labels

Custom Buttons

Information (Header visible on edit only)

Price

Gold Price

Silver Price

GEN-2004-001234

\$123.45

\$123.45

Owner

Sample Text

System Information (Header visible on edit only)

Created By

Last Modified By

Sample Text

Sample Text

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only)

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

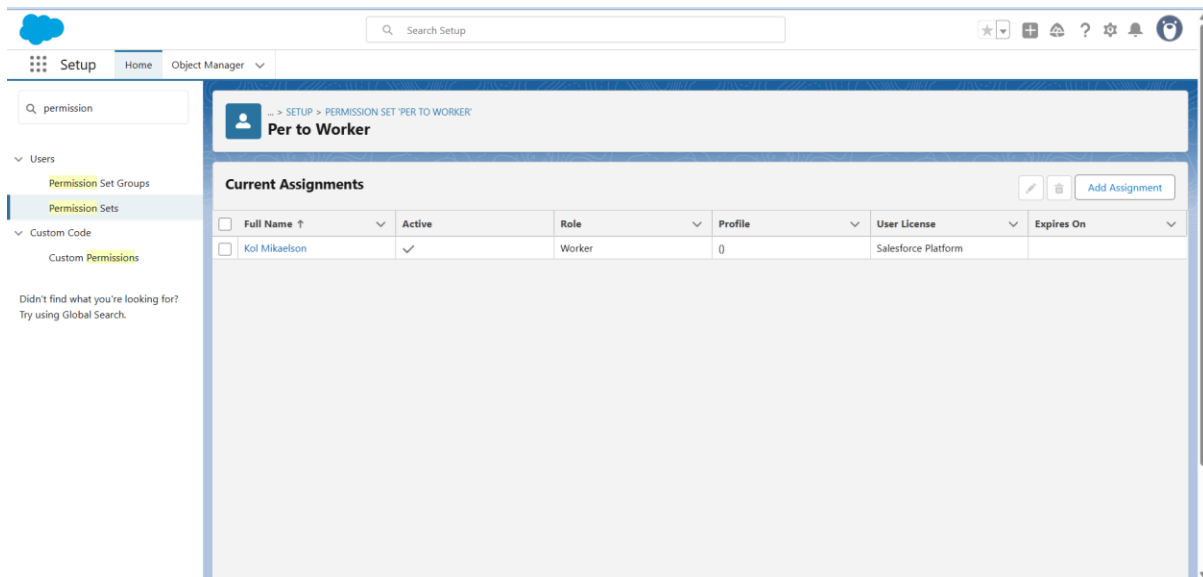
## ➤ Billing Layout:

The screenshot shows the Salesforce Setup interface for the Billing layout. The left sidebar contains a navigation menu with options like 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, Restriction Rules, and Scoping Rules. The main content area is titled 'Billing' and includes a 'Layout Properties' window at the top. Below this, there's a 'Billing Detail' section with a table of fields and their values. The table has columns for 'Field Name', 'Created By', 'Last Modified By', and 'Stones/other price'. The rows include 'Blank Space', 'Gold/Silver Price', 'Making Charges', 'Ornament', 'Total Amount', and 'Weight'. The 'Billing Detail' section also includes a 'System Information' table with columns for 'Field Name', 'Created By', and 'Last Modified By'. The 'System Information' table has rows for 'Billing', 'Item', 'Ornament', 'Total Amount', and 'Weight'.

## 2.9 Created Roles.

The screenshot shows the Salesforce Setup interface for the Roles configuration. The left sidebar contains a navigation menu with options like Users, Roles (selected), Feature Settings, Sales, Service, and Case Teams. The main content area is titled 'Roles' and includes a 'Creating the Role Hierarchy' section. This section contains a tree view of the role hierarchy for 'KPR COLLEGE OF ARTS SCIENCE AND RESEARCH'. The hierarchy starts with 'CEO' at the top, followed by 'Gold\_Smith', 'Worker', 'COO', 'SVP\_Customer Service & Support', 'Customer Support International', 'Customer Support North America', and 'Installation & Repair Services'. Each role in the hierarchy has an 'Add Role' button next to it. The 'Show in tree view' dropdown is set to 'Show in tree view'.

## 2.10 Created a Permission Set.



## 2.11 Created a Flow.

