

## CRM Application for Jewel Management (Developer)

**College Name:**Sri Ramalinga Sowambagai College OF Science And Commerce

**College Code:**3y

**Team ID :** NM2025TMID25526

**Team Size :** 5

**Team Leader :** Sanjaykumar P

**Email :** sanj213456@gmail.com

**Team member :** Hemaraj K

**Email :** hemaraj637951@gmail.com

**Team member :** Kalidas P

**Email :** kalick07123@gmail.com

**Team member :** Jayakumar B

**Email :** j39146113@gmail.com

**Team member :** Ravin R

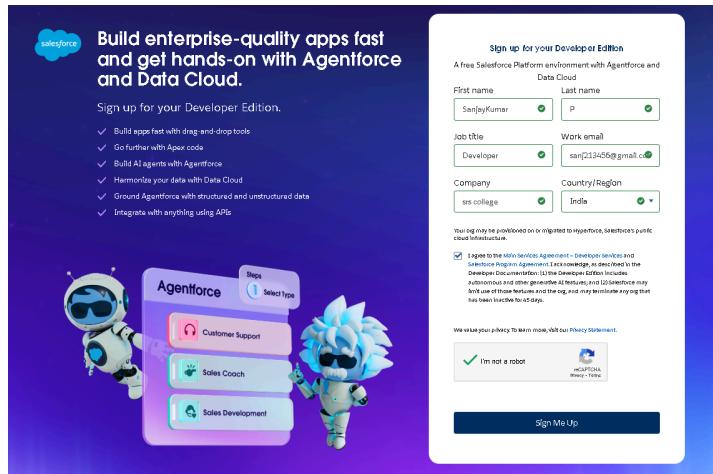
**Email :** ravinneymar97@gmail.com

## INTRODUCTION :

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.

## DEVELOPMENT PHASE :

**Creating Developer Account:** By using this URL - <https://www.salesforce.com/form/developer-signup/?d=pb>



## Create Jewel Customer Object :

SETUP > OBJECT MANAGER  
**Jewel Customer**

Details	
Description	
API Name	<input type="text" value="Jewel_Customer_c"/>
Custom	<input checked="" type="checkbox"/>
Singular Label	Jewel Customer
Plural Label	Jewel Customers
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

## Create Objects – Item , Customer Order , Price , Billing :

← → ⌂ orgfarm-6b9efaba9c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gL000001xkEl/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

## Item

**Details**

Description

API Name: Item\_c  
Custom: ✓  
Singular Label: Item  
Plural Label: Items

Enable Reports: ✓  
Track Activities  
Track Field History  
Deployment Status: Deployed  
Help Settings: Standard salesforce.com Help Window

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

Edit Delete

orgfarm-6b9efab9c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001xkuH/Details/view

## Customer Order

**Details**

Description

API Name  
**Customer\_Order\_c**

Custom  
✓

Singular Label  
**Customer Order**

Plural Label  
**Customer Orders**

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

**Edit** **Delete**

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

orgfarm-6b9efab9c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001xGr/Details/view

## Billing

**Details**

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

**Edit** **Delete**

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

orgfarm-6b9efab9c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001xFfF/Details/view

## Price

**Details**

Description

API Name  
**Price\_c**

Custom  
✓

Singular Label  
**Price**

Plural Label  
**Prices**

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

**Edit** **Delete**

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

## To Create a Tab- Item ,Customer Order ,Price ,Billing Objects :

The screenshot shows the Salesforce Setup interface under the 'Tabs' section. It displays a list of custom object tabs:

Action	Label	Tab Style	Description
Edit   Del	Billing	Doll	
Edit   Del	Customer Orders	Computer	
Edit   Del	Items	IP Phone	
Edit   Del	Jewel Customers	Jewel	
Edit   Del	Prices	Phone	

Below this, sections for 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs' are shown, each stating 'No [tab type] tabs have been defined'.

## Create a Lightning App – Jewellery Inventory System :

The screenshot shows the Lightning App Builder interface under the 'App Details & Branding' tab. The 'App Details' section includes fields for 'App Name' (Jewellery Inventory System), 'Developer Name' (Jewellery\_Inventory\_System), and 'Description' (Elevate your look with elegance). The 'App Branding' section allows setting a 'Primary Color Hex Value' (#0070D2) and selecting an 'Image'. The 'Org Theme Options' checkbox is unchecked. The 'App Launcher Preview' shows a blue square icon with 'JI' and the app name.

## Creating Lookup Relationship - Customer :

The screenshot shows the Salesforce Object Manager interface for the 'Customer Order' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Fields & Relationships' and displays five items. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

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

## Creating a Master-Detail Relationship - Item :

This screenshot is identical to the one above, showing the 'Fields & Relationships' section for the 'Customer Order' object. The table data remains the same, indicating that no changes have been made to the relationship settings.

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

## Creating Text Field , Phone , Email in Jewel Customer Object :

The screenshot shows the Salesforce Setup interface for the 'Jewel Customer' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the 'Fields & Relationships' section with a table. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(30)		✓
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		

## Creating the number,Picklist fields in Item object :

The screenshot shows the Salesforce Setup interface for the 'Item' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the 'Fields & Relationships' section with a table. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Item Id	Name	Auto Number		✓
Item Type	Item_Type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Purity	Purity__c	Number(2, 0)		

## Creating Formula Field (Cross Object) in Item Object :

Setup > OBJECT MANAGER  
Item

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Expected Days Of Return	Expected_Days_Of_Return__c	Picklist		
Gold Price	Gold_Price__c	Formula (Currency)		
Item Id	Name	Auto Number		
Item Type	Item_Type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Prices	Prices__c	Lookup(Price)		
Priority	Priority__c	Picklist		
Purity	Purity__c	Number(2, 0)		

## Creating the validation rule - Postal Code & ValidationRule For JewelCustomerObject :

Setup > OBJECT MANAGER  
Jewel Customer

Validation Rules

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Postal_Code	Zip/Postal code	Must contain 6 digits	✓	SanjayKumar P. 9/3/2025, 11:03 PM
ValidationRule_For_JewelCustomerObject	Top of Page	Please fill Required fields	✓	SanjayKumar P. 9/3/2025, 11:10 PM

## Creating the validation rule - ValidationRule For Item :

The screenshot shows the 'Object Manager' page in Salesforce. A new validation rule is being created for the 'Item' object. The 'Validation Rule Detail' section includes:

- Rule Name:** ValidationRule\_For\_Item
- Error Condition Formula:** OR((ISBLANK(Amount\_\_c)),(ISBLANK(Customer\_Name\_\_c)),ISBLANK(Gold\_Price\_\_c),(ISBLANK(EDM\_\_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))
- Error Message:** Please fill Required fields
- Description:** (empty)
- Created By:** SanjuktaKumar P 9/3/2025, 11:28 PM
- Modified By:** SanjuktaKumar P 9/3/2025, 11:28 PM

The status is set to Active.

## Gold Smith Profile :

The screenshot shows the 'Profiles' page in Salesforce. A new profile named 'Gold Smith' is being created. The 'Profile Detail' section includes:

- Name:** Gold Smith
- User License:** Salesforce
- Description:** (empty)
- Created By:** SanjuktaKumar P 9/3/2025, 11:31 PM
- Modified By:** SanjuktaKumar P 9/3/2025, 11:33 PM

The status is set to Custom Profile.

**Page Layouts** section:

Object	Layout	Assignment
Global	Global Layout [View Assignment]	Location Group Assignment [View Assignment]
Email Application	Not Assigned [View Assignment]	Macro Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Object Milestone [View Assignment]
Account	Account Layout [View Assignment]	Operating Hours [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Opportunity [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Opportunity Product [View Assignment]
Asset	Asset Layout [View Assignment]	Order [View Assignment]

## Creating Gold Smith Role :

The screenshot shows the Salesforce Setup Roles page. On the left, a sidebar navigation includes 'Users' (selected), 'Roles' (highlighted in blue), 'Feature Settings', 'Sales' (with 'Contact Roles on Contracts' and 'Contact Roles on Opportunities'), 'Service' (with 'Case Teams' and 'Case Team Roles'), and 'Cases' (with 'Contact Roles on Cases'). A note at the bottom says ' Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Creating the Role Hierarchy'. It displays a tree view of roles under 'Your Organization's Role Hierarchy'. The tree starts with 'srs college' (expanded) which contains 'Add Role', 'CEO', 'CFO', 'COO', 'Gold.Smith' (selected), 'SVP.Customer Service & Support', 'Customer Support International', 'Customer Support North America', 'Installation & Repair Services', and 'SVP.Human Resources'. Each role node has 'Edit | Del | Assign' links. A vertical scroll bar is visible on the right side of the content area.

## Create User :

The screenshot shows the Salesforce Setup Users page. On the left, a sidebar navigation includes 'Users' (selected), 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings' (selected), 'Users' (highlighted in blue), 'Feature Settings', 'Data.com', and 'Prospector Users'. A note at the bottom says ' Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'User' and shows a 'User Detail' section for 'Niklaus Mikaelson'. The 'User Detail' table has two columns. The left column contains fields: Name (Niklaus Mikaelson), Alias (nnika), Email (san219456@gmail.com), Username (san219456@gmail.com), Nickname (nn27032006), Title (Title), Company (Company), Department (Department), Division (Division), Address (Address), Time Zone (GMT-07:00 Pacific Daylight Time (America/Los\_Angeles)), Locale (English (United States)), Language (English), Delegated Approver (Delegated Approver), Manager (Manager), Receive Approval Request Emails (Only if I am an approver), Federation ID (Federation ID), Role (Gold Smith), User License (Salesforce), Profile (Gold Smith), Active (Active checked), Marketing User (Marketing User), Offline User (Offline User), Knowledge User (Knowledge User), Flow User (Flow User), Service Cloud User (Service Cloud User), Site.com Contributor User (Site.com Contributor User), Site.com Publisher User (Site.com Publisher User), WDC User (WDC User), Mobile Push Registration (Mobile Push Registration), Data.com User Type (Data.com User Type), Accessibility Mode (Classic Only) (Accessibility Mode (Classic Only)), Debug Mode (Debug Mode), and High-Contrast Palette on Charts (High-Contrast Palette on Charts). The right column contains checkboxes for various user types. A 'User Profile Help for this Page' link is located at the top right of the content area.

## To Create Gold & Silver Page layouts :

The screenshot shows the Salesforce Object Manager interface for the 'item' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The 'Page Layouts' section is selected. The main area displays a table titled 'Page Layouts' with three items:

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Item Layout	SanjayKumar P. 9/3/2025, 6:06 AM	SanjayKumar P. 9/4/2025, 12:16 AM
Page Layout for Gold	SanjayKumar P. 9/4/2025, 12:25 AM	SanjayKumar P. 9/4/2025, 12:36 AM
Page Layout for Silver	SanjayKumar P. 9/4/2025, 12:37 AM	SanjayKumar P. 9/4/2025, 12:39 AM

## To create a Record Type - Gold & Silver :

The screenshot shows the Salesforce Object Manager interface for the 'item' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The 'Record Types' section is selected. The main area displays a table titled 'Record Types' with two items:

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	▼	SanjayKumar P. 9/4/2025, 12:47 AM
Silver	Silver items information	▼	SanjayKumar P. 9/4/2025, 12:50 AM

## Creating permission set :

The screenshot shows the Salesforce Setup interface. In the top left, there's a blue cloud icon. The top navigation bar includes links for 'Setup', 'Home', and 'Object Manager'. A search bar labeled 'Search Setup' is at the top right. Below the navigation, a sidebar on the left has a 'Users' section with 'Permission Set Groups' and 'Permission Sets' selected. A message says ' Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Per to Worker' and shows a table titled 'Current Assignments'. The table has columns for 'Full Name', 'Active', 'Role', 'Profile', 'User License', and 'Expires On'. One row is listed: 'kali das' with 'Active' checked, 'Role' as 'Worker', 'Profile' as 'Worker Profile', 'User License' as 'Salesforce Platform', and no expiration date specified.

## Create a Trigger Handler class & The Trigger :

The screenshot shows the Salesforce Apex code editor. The title bar indicates the file is 'UpdatePaidAmountTriggerHandler.apex'. The code itself is as follows:

```
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
12
13
14
15    public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap, List<Billing__c> updatedBillings) {
16
17        for (Billing__c billing : updatedBillings) {
18
19            Billing__c oldBilling = oldBillingsMap.get(billing.Id);
20
21            Decimal oldPaidAmount = oldBilling.Paid_Amount__c;
22
23            billing.Paid_Amount__c = oldPaidAmount + billing.Paying_Amount__c;
24
25        }
26    }
27}
```

The code defines a trigger handler class with two static methods: 'handleBeforeInsert' and 'handleBeforeUpdate'. The 'handleBeforeInsert' method iterates through a list of new Billings and sets the Paid\_Amount\_\_c field to the Paying\_Amount\_\_c field. The 'handleBeforeUpdate' method iterates through a list of updated Billings, retrieves the old record from a map, adds the old Paid\_Amount\_\_c to the Paying\_Amount\_\_c, and then updates the Paid\_Amount\_\_c field.

## Create, View and Delete a Record (Jewel Customer):

Jewel Customers

Recently Viewed ▾

9 items • Updated a few seconds ago

	Customer Name
1	customer9
2	customer8
3	customer7
4	customer6
5	customer5
6	customer4
7	customer3
8	customer2
9	customer1

New Import Change Owner Assign Label

## Create Report:

Report: Prices

Prices Report

Total Records: 9 Total Gold Price: \$678,033

Price: ID	Gold Price	Price: Price Name
a03gL000000BAdj	\$92,765	Item-07
a03gL000000BB7UU	\$8,800	Item-01
a03gL000000BB8K6	\$81,785	Item-08
a03gL000000BB9Qw	\$89,769	Item-06
a03gL000000BB9b7	\$97,875	Item-02
a03gL000000BB9qj	\$9,764	Item-03
a03gL000000BB9nP	\$98,415	Item-04
a03gL000000BB9rF	\$98,164	Item-05
a03gL000000BB9zJ	\$89,696	Item-09
10	\$678,033	

## Create Dashboard :

The screenshot shows a Salesforce dashboard titled "Dashboard 1". At the top, there's a search bar and various navigation icons. Below the title, it says "As of Sep 4, 2025, 2:36 AM" and "Viewing as SanjayKumar P". The main content area features a card titled "Prices Report" with a table of data:

Price ID	Gold Price	Price Name
a03gL00000BAdj	\$99k	Item-07
a03gL00000BB7UU	\$10k	Item-01
a03gL00000BB8k6	\$90k	Item-08
a03gL00000BB9Qw	\$90k	Item-06
a03gL00000BB9b7	\$98k	Item-02
a03gL00000BB9qj	\$10k	Item-03
a03gL00000BB9nP	\$96k	Item-04

At the bottom of the card, there are links "View Report (Prices Report)" and "As of Sep 4, 2025, 2:36 AM".

## Create a Flow :

The screenshot shows the Flow Builder interface for a flow named "Billing Alert Flow - V1". The top bar includes buttons for Back, Forward, Refresh, and Save. The main area has tabs for "Flow Builder" and "Billing Alert Flow - V1". The status bar indicates "Last saved on 9/4/2025, 09:20 PM" and "Active". There are buttons for Run, Debug, View Tests, Save As New Version, Save, and Deactivate.

**Errors and Warnings**

**Errors (0) Warnings (0)**

You have 0 errors.

**Start**  
Record-Triggered Flow

Object: Billing Edit  
Trigger: A record is created or updated  
Optimize for: Actions and Related Records

+ Add Scheduled Paths (Optional)  
Open Flow Trigger Explorer for Billing

Run Immediately

Action notice

Flow navigation buttons: Minimize, Maximize, Close, New, Duplicate, +

## **Conclusion :**

The CRM Application for Jewel Management successfully streamlined customer interactions, sales tracking, and inventory management for jewelry businesses. As a developer, I focused on building a secure, scalable, and user-friendly system tailored to industry needs. This project enhanced operational efficiency and improved customer engagement. It also laid the groundwork for future features like analytics and mobile support.