

CRM
APPLICATIONFOR
JEWELMANAGEM
ENT(DEVELOPER)



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1. INTRODUCTION:

1.1 PROJECT OVERVIEW

This CRM application is a software solution designed to streamline the processes of a jewel business. It manages customer relationships, sales, and inventory to improve efficiency and enhance the customer experience.

1.2 PURPOSE

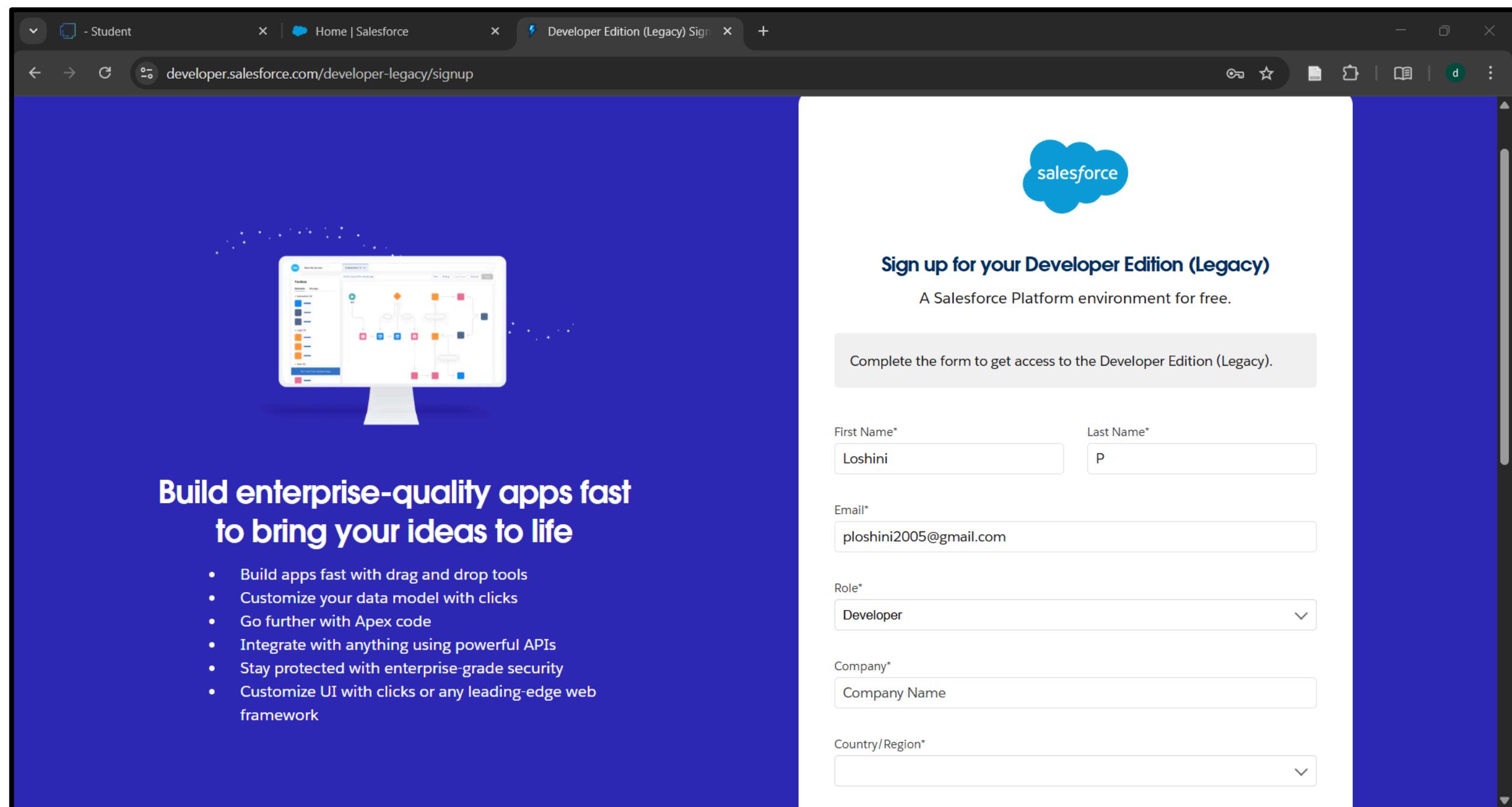
The main objective of the application is to:

- ◆ Increase customer satisfaction and loyalty.
- ◆ Provide data-driven insights for better decision-making.
- ◆ Reduce manual effort and human errors in daily operations.

DEVELOPMENT PHASE

Creating Development Phase

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



OBJECTS

Created Objects: Jewel Customer, Item, Customer, Order, Price and Billing

A screenshot of the Salesforce Object Manager interface for the "Jewel Customer" object. The top navigation bar shows "Setup > OBJECT MANAGER" and the object name "Jewel Customer". On the left, a sidebar lists various setup 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, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area displays the "Details" tab for the "Jewel Customer" object. It includes fields for Description, API Name (set to "Jewel_Customer__c"), Singular Label (set to "Jewel Customer"), Plural Label (set to "Jewel Customers"), and several checkboxes for configuration: Enable Reports (checked), Track Activities, Track Field History, Deployment Status (set to "Deployed"), Help Settings, and Standard salesforce.com Help Window. At the bottom right of the main area are "Edit" and "Delete" buttons.

- Student Item | Salesforce Developer Edition (Legacy) Sign +

tiruppkumarancollegefo90-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dL000009nx3N/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Item

Details

Description

API Name
Item_c

Custom
✓

Singular Label
Item

Plural Label
Items

Details

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
Restriction Rules
Scoping Rules

- Student Customer Order | Salesforce Developer Edition (Legacy) Sign +

tiruppkumarancollegefo90-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dL000009nxV/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Customer Order

Details

Description

API Name
Customer_Order_c

Custom
✓

Singular Label
Customer Order

Plural Label
Customer Orders

Details

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
Restriction Rules
Scoping Rules

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Billing'. On the left, a sidebar lists various configuration options under '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, and Scoping Rules. The right panel displays the 'Details' section for the Billing object, which includes fields for Description, API Name (Billing_c), Custom status (✓), Singular Label (Billing), Plural Label (Billings), and various deployment and help settings.

TABS

- Created tabs: Jewel Customer, Item, Customer, Order, Price and Billing

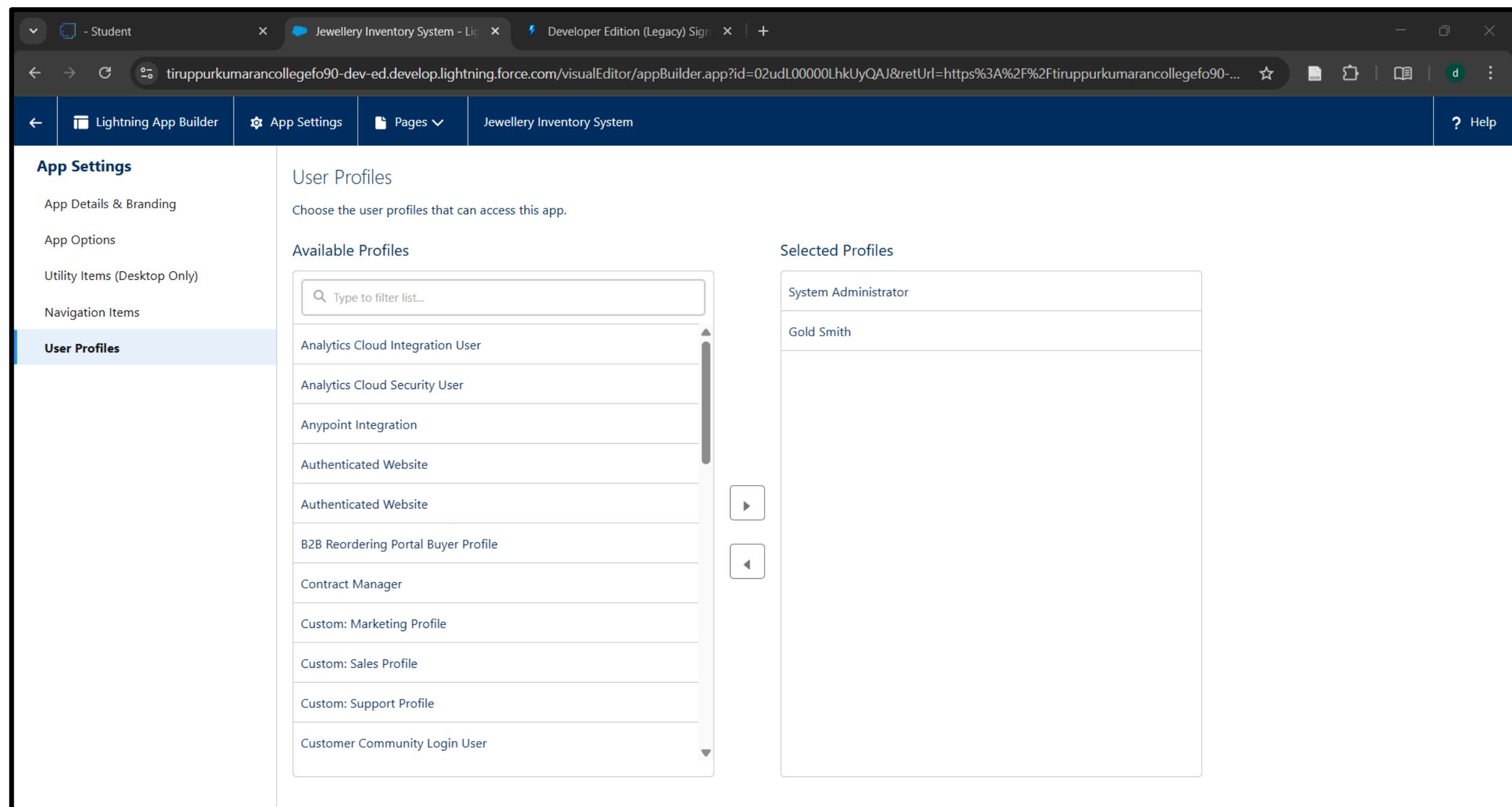
The screenshot shows the Salesforce Tabs setup interface. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > TABS'. The left sidebar has a search field for 'tabs' and categories for 'User Interface' (selected) and 'Rename Tabs and Labels'. Under 'User Interface', there is a 'Tabs' section with a message: 'Didn't find what you're looking for? Try using Global Search.' The right panel displays the 'Custom Object Tabs' section, which lists five tabs: Billings, Customer Orders, Items, Jewel Customers, and Prices. Each tab entry includes an 'Edit | Del' link, a 'Tab Style' icon, and a 'Description' column. Below this are sections for 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs', each stating 'No [tab type] have been defined'.

THE LIGHTNING APPS

□ Developed lightning apps using relevant tabs

The screenshot shows the 'App Details & Branding' tab in the Lightning App Builder. On the left, the sidebar lists 'App Settings' with 'App Details & Branding' selected. The main area contains fields for 'App Name' (Jewellery Inventory System), 'Developer Name' (Jewellery_Inventory_System), and a 'Description' (Elevate your look with elegance). It also includes an 'Image' section with a placeholder image and a color picker set to #0070D2, and an 'Org Theme Options' checkbox. A preview of the app launcher is shown at the bottom.

The screenshot shows the 'Navigation Items' tab in the Lightning App Builder. The sidebar has 'App Settings' with 'Navigation Items' selected. The main area displays a list of 'Available Items' on the left, which includes standard Salesforce items like Accounts, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations, Approval Requests, Approval Submission Details, Approval Submissions, and more. On the right, a list of 'Selected Items' shows 'Jewel Customers' and other items like Items, Prices, Customer Orders, Billings, Reports, and Dashboards. Navigation arrows between the two lists allow for moving items between them.



FIELDS AND RELATIONSHIPS

- Configured fields and relationships

| SETUP > OBJECT MANAGER Item | | | | | |
|--------------------------------|-------------------------|---------------------------|------------------------|-----------|---------------------------|
| Details | | Field | Quick Find | New | Deleted Fields |
| Fields & Relationships | | FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD INDEXED |
| Page Layouts | Amount | Amount_c | Formula (Currency) | | |
| Lightning Record Pages | Created By | CreatedById | Lookup(User) | | |
| Buttons, Links, and Actions | Customer Name | Customer_Name_c | Lookup(Jewel Customer) | | |
| Compact Layouts | Expected Days Of Return | Expected_Days_OF_Return_c | Picklist | Priority | |
| Field Sets | Gold Price | Gold_Price_c | Formula (Currency) | | |
| Object Limits | Item Id | Name | Auto Number | | |
| Record Types | Item Type | Item_Type_c | Picklist | | |
| Related Lookup Filters | KDM | KDM_c | Formula (Currency) | | |
| Search Layouts | Last Modified By | LastModifiedById | Lookup(User) | | |
| List View Button Layout | | | | | |
| Restriction Rules | | | | | |
| | | | | | |

| SETUP > OBJECT MANAGER Customer Order | | | | | |
|--|------------------|------------------|------------------------|-----------|---------------------------|
| Details | | Field | Quick Find | New | Deleted Fields |
| Fields & Relationships | | FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD INDEXED |
| Page Layouts | Created By | CreatedById | Lookup(User) | | |
| Lightning Record Pages | Customer | Customer_c | Lookup(Jewel Customer) | | |
| Buttons, Links, and Actions | Customer Id | Name | Auto Number | | |
| Compact Layouts | Item | Item_c | Master-Detail(Item) | | |
| Field Sets | KDM Charge | KDM_Charge_c | Formula (Currency) | | |
| Object Limits | Last Modified By | LastModifiedById | Lookup(User) | | |
| Record Types | Order Status | Order_Status_c | Picklist | | |
| Related Lookup Filters | | | | | |
| Search Layouts | | | | | |
| List View Button Layout | | | | | |
| Restriction Rules | | | | | |
| | | | | | |

| SETUP > OBJECT MANAGER Billing | | | | | |
|-----------------------------------|-------------------|---------------------|--------------------|-----------|-------------------|
| Details | | Field | Quick Find | New | Deleted Fields |
| Fields & Relationships | | FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD |
| Page Layouts | Amount | Amount_c | Formula (Currency) | | |
| Lightning Record Pages | Billing Id | Name | Auto Number | | |
| Buttons, Links, and Actions | Created By | CreatedById | Lookup(User) | | |
| Compact Layouts | Gold/Silver Price | Gold_Silver_Price_c | Formula (Currency) | | |
| Field Sets | Item | Item_c | Lookup(Item) | | |
| Object Limits | KDM Charge | KDM_Charge_c | Formula (Currency) | | |
| Record Types | Last Modified By | LastModifiedById | Lookup(User) | | |
| Related Lookup Filters | Making Charges | Making_Charges_c | Formula (Currency) | | |
| Search Layouts | | | | | |
| List View Button Layout | | | | | |
| Restriction Rules | | | | | |
| | | | | | |

| SETUP > OBJECT MANAGER Price | | | | | |
|---------------------------------|------------------|------------------|--------------------|-----------|---------------------------|
| Details | | Field | Quick Find | New | Deleted Fields |
| Fields & Relationships | | FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD INDEXED |
| Page Layouts | Created By | CreatedById | Lookup(User) | | |
| Lightning Record Pages | Gold Price | Gold_Price_c | Currency(18, 0) | | |
| Buttons, Links, and Actions | Last Modified By | LastModifiedById | Lookup(User) | | |
| Compact Layouts | Owner | OwnerId | Lookup(User/Group) | | |
| Field Sets | Price Id | Name | Auto Number | | |
| Object Limits | Silver Price | Silver_Price_c | Currency(8, 2) | | |
| Record Types | | | | | |
| Related Lookup Filters | | | | | |
| Search Layouts | | | | | |
| List View Button Layout | | | | | |
| Restriction Rules | | | | | |
| | | | | | |

| SETUP > OBJECT MANAGER Jewel Customer | | | | | |
|--|------------------|-------------------|--------------------|-----------|---------------------------|
| Details | | Field | Quick Find | New | Deleted Fields |
| Fields & Relationships | | FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD INDEXED |
| Page Layouts | City | City_c | Text(25) | | |
| Lightning Record Pages | Country | Country_c | Text(10) | | |
| Buttons, Links, and Actions | Created By | CreatedById | Lookup(User) | | |
| Compact Layouts | Customer Name | Name | Text(50) | | |
| Field Sets | Email | Email_c | Email | | |
| Object Limits | Last Modified By | LastModifiedById | Lookup(User) | | |
| Record Types | Owner | OwnerId | Lookup(User/Group) | | |
| Related Lookup Filters | Phone | Phone_c | Phone | | |
| Search Layouts | State | State_c | Text(50) | | |
| List View Button Layout | Street | Street_c | Text(50) | | |
| Restriction Rules | ZipPostal Code | Zip_Postal_Code_c | Text(50) | | |
| Shipping Rules | | | | | |
| Object Acounts | | | | | |
| | | | | | |

FIELDS AND DEPENDENCIES

□ Created fields and dependencies for item

The screenshot shows the Salesforce Setup interface for configuring field dependencies. On the left, the navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'SETUP' and shows 'Controlling Field' as 'Priority' and 'Dependent Field' as 'Expected Days Of Return'. Below this, the 'Instructions' section provides guidance on using the dependency matrix. A legend indicates that yellow cells represent 'Included Value' and white cells represent 'Excluded Value'. The dependency matrix is as follows:

| Priority: | Low | Medium | High | Critical |
|--------------------------|------------------|-----------|-----------|-----------|
| Expected Days Of Return: | 1-3 Days | 1-3 Days | 1-3 Days | 1-3 Days |
| | 4-5 Days | 4-5 Days | 4-5 Days | 4-5 Days |
| | 6-7 Days | 6-7 Days | 6-7 Days | 6-7 Days |
| | 8-10 Days | 8-10 Days | 8-10 Days | 8-10 Days |

At the bottom of the matrix, there are 'Include Values' and 'Exclude Values' buttons. Below the matrix, there are 'Save', 'Cancel', and 'Preview' buttons.

The screenshot shows the Salesforce Object Manager interface for creating a field dependency. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Fields & Relationships. The main content area is titled 'Item Field Dependencies' and shows a table of dependencies:

| Action | Controlling Field | Dependent Field | Modified By |
|------------|-------------------|-------------------------|--------------------------------|
| Edit Del | Priority | Expected Days Of Return | Loshini P. 07/09/2025, 2:07 pm |

□ Created validation rule for jewel Customer

Jewel Customer Validation Rule

Validation Rule Detail

| 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}"))), NOT(ISBLANK(Zip_Postal_code__c))) | <input checked="" type="checkbox"/> | |
| Error Message | Must contain 6 digits", select the Error location as Field and select the field as "Zip/Postal code | Error Location | |
| Description | | Top of Page | |
| Created By | Loshini P. 29/08/2025, 10:54 pm | Modified By | Loshini P. 29/08/2025, 10:54 pm |

PROFILES

□ Created profiles: Goldsmith and worker profiles

Profile
Gold Smith

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) | [Enabled External Credential Principal Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[0\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) | [Enabled Custom Permissions \[0\]](#)

Profile Detail

| Name | Gold Smith | Custom Profile | |
|--------------|---------------------------------|-------------------------------------|--------------------------------|
| User License | Salesforce | <input checked="" type="checkbox"/> | |
| Description | | | |
| Created By | Loshini P. 29/08/2025, 11:13 pm | Modified By | Loshini P. 07/09/2025, 2:11 pm |

Page Layouts

| Standard Object Layouts | Global | Location Group |
|----------------------------|--|--|
| Global | Global Layout [View Assignment] | Location Group Layout [View Assignment] |
| Email Application | Not Assigned [View Assignment] | Location Group Assignment [View Assignment] |
| Home Page Layout | DE Default [View Assignment] | Macro [View Assignment] |
| Account | Account Layout [View Assignment] | Object Milestone [View Assignment] |
| Alternative Payment Method | Alternative Payment Method Layout [View Assignment] | Operating Hours [View Assignment] |
| Appointment Invitations | Appointment Invitation Layout | Opportunity [View Assignment] |

The screenshot shows the Salesforce Setup interface with the URL <https://tiruppukumarancollege090-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edL00000JXPUX>. The page is titled 'Worker Profile' under the 'Profiles' section. It displays profile details like Name (Worker Profile), User License (Salesforce Platform), and Description (Created By Loshini P, 29/08/2025, 11:24 pm). The 'Page Layouts' section lists standard object layouts for various objects such as Global, Email Application, Home Page Layout, Account, Alternative Payment Method, and more, along with their respective lead, location, location group, and location group assignment layouts.

ROLES

□ Created roles: Goldsmith and Worker

The screenshot shows the Salesforce Setup interface with the URL <https://tiruppukumarancollege090-dev-ed.lightning.force.com/lightning/setup/Roles/page?address=%2F00edL00000JXPUX>. The page is titled 'Creating the Role Hierarchy' and shows the 'Your Organization's Role Hierarchy'. The hierarchy includes roles like CEO, CFO, COO, Gold Smith, Worker, and SVP, Customer Service & Support. The 'Gold Smith' and 'Worker' roles are highlighted with red boxes.

USERS

□ Created users

Setup Home Object Manager

SETUP Users

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users | Edit | Create New View

| Action | Full Name | Alias | Username | Role | Active | Profile |
|----------------------|-------------------|---------|---|------------|-------------------------------------|----------------------------------|
| Edit | Chatter Expert | Chatter | chatty.00dd00000bqqlquaw.1mumc8xrgnt@chatter.salesforce.com | | <input checked="" type="checkbox"/> | Chatter Free User |
| Edit | Mikaelson_Elijah | eli | elijahm@org.com | Worker | <input checked="" type="checkbox"/> | Worker Profile |
| Edit | Mikaelson_Kol | kmika | elson@org.com | Worker | <input checked="" type="checkbox"/> | Worker Profile |
| Edit | Mikaelson_Niklaus | nmika | nikmik@org.com | Gold Smith | <input checked="" type="checkbox"/> | Gold Smith |
| Edit | Mike_Rebekah | Bekah | rebekahm@org.com | Worker | <input checked="" type="checkbox"/> | Worker Profile |
| Edit | P_Loshini | LP | loshini@developer.com | | <input checked="" type="checkbox"/> | System Administrator |
| Edit | User_Integration | integ | integration@00dd00000bqqlquaw.com | | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| Edit | User_Security | sec | insightssecurity@00dd00000bqqlquaw.com | | <input checked="" type="checkbox"/> | Analytics Cloud Security User |

New User | Reset Password(s) | Add Multiple Users

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

PAGE LAYOUTS

- Created page layouts: Gold page layout and silver page layout for item

Setup Home Object Manager

SETUP > OBJECT MANAGER Item

Page Layouts

3 Items, Sorted by Page Layout Name

| PAGE LAYOUT NAME | CREATED BY | MODIFIED BY |
|------------------------|--------------------------------|--------------------------------|
| Item Layout | Loshini P, 28/08/2025, 8:37 pm | Loshini P, 29/08/2025, 9:14 pm |
| Page Layout for Gold | Loshini P, 30/08/2025, 1:38 pm | Loshini P, 30/08/2025, 1:52 pm |
| Page Layout for Silver | Loshini P, 30/08/2025, 1:56 pm | Loshini P, 30/08/2025, 2:03 pm |

Quick Find | New | Page Layout Assignment

RECORD TYPES

- Created record types: Gold and Silver for item

- Student

Item | Salesforce

tiruppukumarancollegef090-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000009nx3N/RecordTypes/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Item

Record Types

2 Items, Sorted by Record Type Label

| RECORD TYPE LABEL | DESCRIPTION | ACTIVE | MODIFIED BY |
|-------------------|--------------------------|--------|--------------------------------|
| Gold | Gold items information | ✓ | Loshini P, 30/08/2025, 2:17 pm |
| Silver | Silver items information | ✓ | Loshini P, 30/08/2025, 2:34 pm |

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

- Student

Billings with Item Report | Item | Salesforce

Billing Alert Flow - V1 | Developer Console | New Tab

tiruppukumarancollegef090-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000009nx3N/RecordTypes/012dL0000090z4jQAA/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Item

Record Type Gold

Help for this Page ?

Back to Custom Object: Item

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

Edit

| | | | |
|-------------------|--------------------------------|-------------|--------------------------------|
| Record Type Label | Gold | Active | ✓ |
| Record Type Name | Gold | | |
| Namespace Prefix | | | |
| Description | Gold items information | | |
| Created By | Loshini P, 30/08/2025, 2:17 pm | Modified By | Loshini P, 30/08/2025, 2:17 pm |

Picklists Available for Editing

| Action | Field | Modified Date |
|--------|-------------------------|---------------------|
| Edit | Expected Days Of Return | 30/08/2025, 2:17 pm |
| Edit | Item Type | 30/08/2025, 2:17 pm |
| Edit | Priority | 30/08/2025, 2:17 pm |

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

Record Type
Silver

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

| Action | Field | Modified Date |
|--------|-------------------------|---------------------|
| Edit | Expected Days of Return | 30/08/2025, 2:34 pm |
| Edit | Item Type | 30/08/2025, 2:34 pm |
| Edit | Priority | 30/08/2025, 2:34 pm |

PERMISSION SET

- Created permission set: Per to Worker

Permission Set
Per to Worker

Permission Set Overview

| | |
|--------------------------------|--------------------------------|
| Description | API Name |
| License | Per_to_Worker |
| Session Activation Required | <input type="checkbox"/> |
| Permission Set Groups Added To | 0 |
| Created By | Loshini P. 30/08/2025, 4:08 pm |
| Last Modified By | Loshini P. 30/08/2025, 4:13 pm |

Apps

- Assigned Apps
- Assigned Connected Apps
- Object Settings
- App Permissions
- Apex Class Access
- Visualforce Page Access

TRIGGERS

- Created a trigger handler
- class:UpdatePaidAmountTriggerHandler
UpdatePaidAmountTrigger

```

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

```



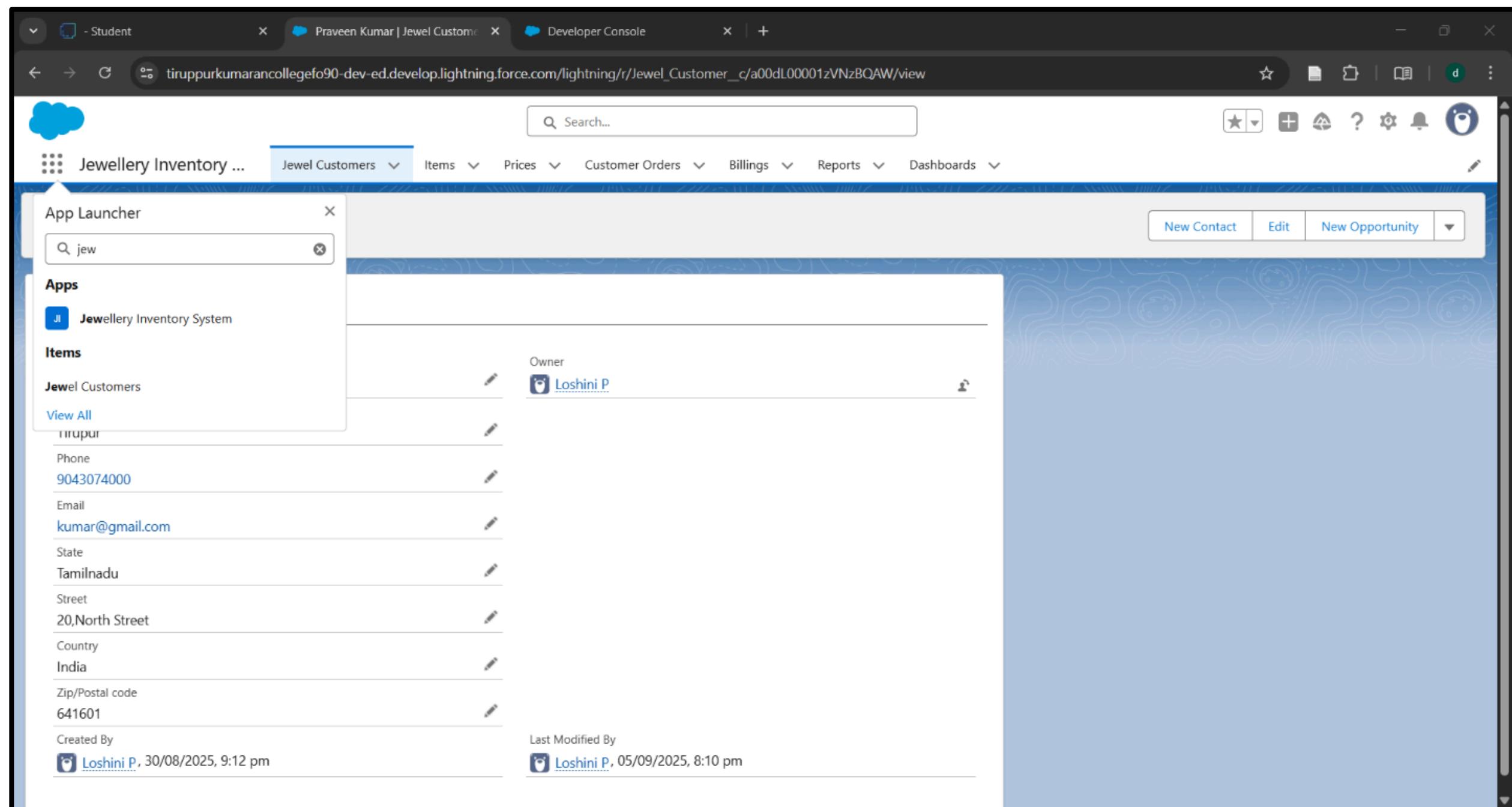
```

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

```

USER ADOPTION

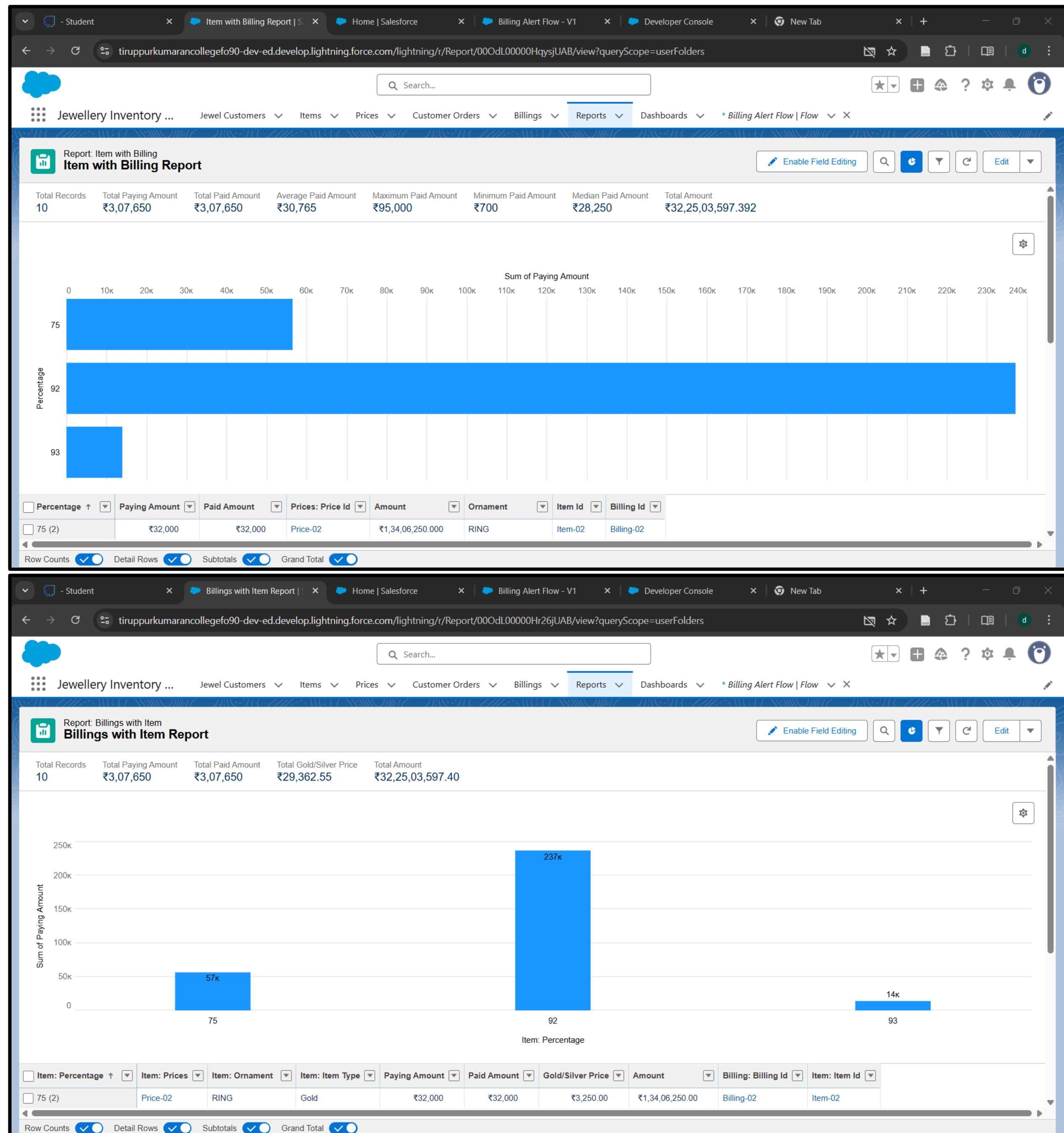
- Created Record for Jewel customer in Jewel inventory system



REPORTS

- Created Reports: Price, item with Billing, Billings with item and Costumer

| Report: Prices Report | | | |
|-----------------------|------------------|------------|-----------------|
| Total Records | Total Gold Price | | |
| 10 | ₹2,93,500 | | |
| | Price: ID | Gold Price | Price: Price Id |
| 1 | a03dL000019LkIL | - | Price-10 |
| 2 | a03dL000019LIPn | ₹32,600 | Price-02 |
| 3 | a03dL000019LqzL | ₹16,000 | Price-03 |
| 4 | a03dL000019LrGy | - | Price-08 |
| 5 | a03dL000019Lv0o | - | Price-07 |
| 6 | a03dL000019LxSp | ₹50,000 | Price-01 |
| 7 | a03dL000019LxFW | ₹24,000 | Price-05 |
| 8 | a03dL000019LxNZ | ₹38,000 | Price-04 |
| 9 | a03dL000019LxPB | ₹96,000 | Price-06 |
| 10 | a03dL000019LxSP | - | Price-09 |
| 11 | | ₹2,93,500 | |



DASHBOARDS

□ Created Dashboards for reports

Prices Report

| Price: ID ↑ | Gold Price | Price: Price Id |
|-----------------|------------|-----------------|
| a03dL000019LkIL | - | Price-10 |
| a03dL000019LIPn | ₹33k | Price-02 |
| a03dL000019Lqtz | ₹46k | Price-03 |
| a03dL000019LrGY | - | Price-08 |
| a03dL000019Lv0o | - | Price-07 |
| a03dL000019Lx5p | ₹58k | Price-01 |
| a03dL000019LxFW | ₹24k | Price-05 |

[View Report \(Prices Report\)](#) As of 07-Sept-2025, 4:03 pm

FLOWs

Created Flow: Billing Alert Flow

Configure Start

Select Object
Select the object whose records trigger the flow when they're created, updated, or deleted.

*Object
Billing

Configure Trigger
Trigger the Flow When:

A record is created
 A record is updated
 A record is created or updated
 A record is deleted

Set Entry Conditions
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements
None

Cancel Done

The screenshot shows the Salesforce Flow Builder interface. A modal window titled "Edit Text Template" is open, displaying the configuration for a new element named "EmailBody". The "Body" section contains a rich text editor with the following content:

```
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}
```

The "Body" section includes a toolbar with font styles (Salesforce Sans), size (12), and alignment options. Below the rich text editor are "Cancel" and "Done" buttons.

The background shows the Flow Builder interface with a sidebar for "Text Templates" and "Actions".

The screenshot shows the details page for the "Billing Alert Flow" record. The flow is of type "Record—Run After Save" and is currently "Activated". The "Details" tab is selected, showing the following information:

- Flow Label:** Billing Alert Flow
- API Name:** Billing_Alert_Flow
- Flow Type:** Record-Triggered After Save Flow
- Created Date:** 31/08/2025, 7:21 am
- Last Modified Date:** 05/09/2025, 8:24 pm
- Subcategory:** (empty)

The "Information" section is also visible, listing fields like Associated Record, Progress Status, Last Modified Date, and Flow Owner (Loshini P).

RESULTS

OUTPUT SCREENSHOTS

- Created records for jewel customer, billing ,customer order,price and item

The screenshot shows a Salesforce Lightning interface for a 'Jewellery Inventory' application. The top navigation bar includes links for 'Student', 'Recently Viewed | Jewel Customer', 'Home | Salesforce', 'Billing Alert Flow - V1', 'Developer Console', and various Salesforce navigation icons.

The main content area displays a 'Recently Viewed' list for 'Jewel Customers'. The list header includes a search bar, a toolbar with 'New', 'Import', 'Change Owner', and 'Assign Label' buttons, and a secondary search bar labeled 'Search this list...'. The list itself shows 10 items, each with a checkbox and a name:

| | Customer name |
|----|----------------|
| 1 | Praveen Kumar |
| 2 | Pechimuthu |
| 3 | Kavita Reddy |
| 4 | Manish Gupta |
| 5 | Vikram |
| 6 | Rajesh |
| 7 | Sneha Kulkarni |
| 8 | Arjun Mehta |
| 9 | Priya Nair |
| 10 | Ramesh Sharma |

Below this list is another 'Recently Viewed' section for 'Items'.

The second screenshot shows a similar 'Recently Viewed' list for 'Items'. The top navigation bar and sidebar are identical to the first screenshot. The main content area displays a 'Recently Viewed' list for 'Items'. The list header includes a search bar, a toolbar with 'New', 'Import', 'Change Owner', and 'Assign Label' buttons, and a secondary search bar labeled 'Search this list...'. The list itself shows 10 items, each with a checkbox and an item ID:

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

The image displays two screenshots of a Salesforce Lightning interface.

Top Screenshot: A list view titled "Recently Viewed". The header includes navigation links for Jewel Customers, Items, Prices, Customer Orders, Billings, Reports, Dashboards, and Billing Alert Flow. The "Prices" tab is selected. The main content shows a table with 10 items, each with a checkbox and a link labeled "Price-01" through "Price-09".

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

Bottom Screenshot: A detail view for a "Customer Order" record named "Customer-01". The header includes navigation links for Jewel Customers, Items, Prices, Customer Orders, Billings, Reports, Dashboards, and Billing Alert Flow. The "Customer Orders" tab is selected. The main content shows the following fields:

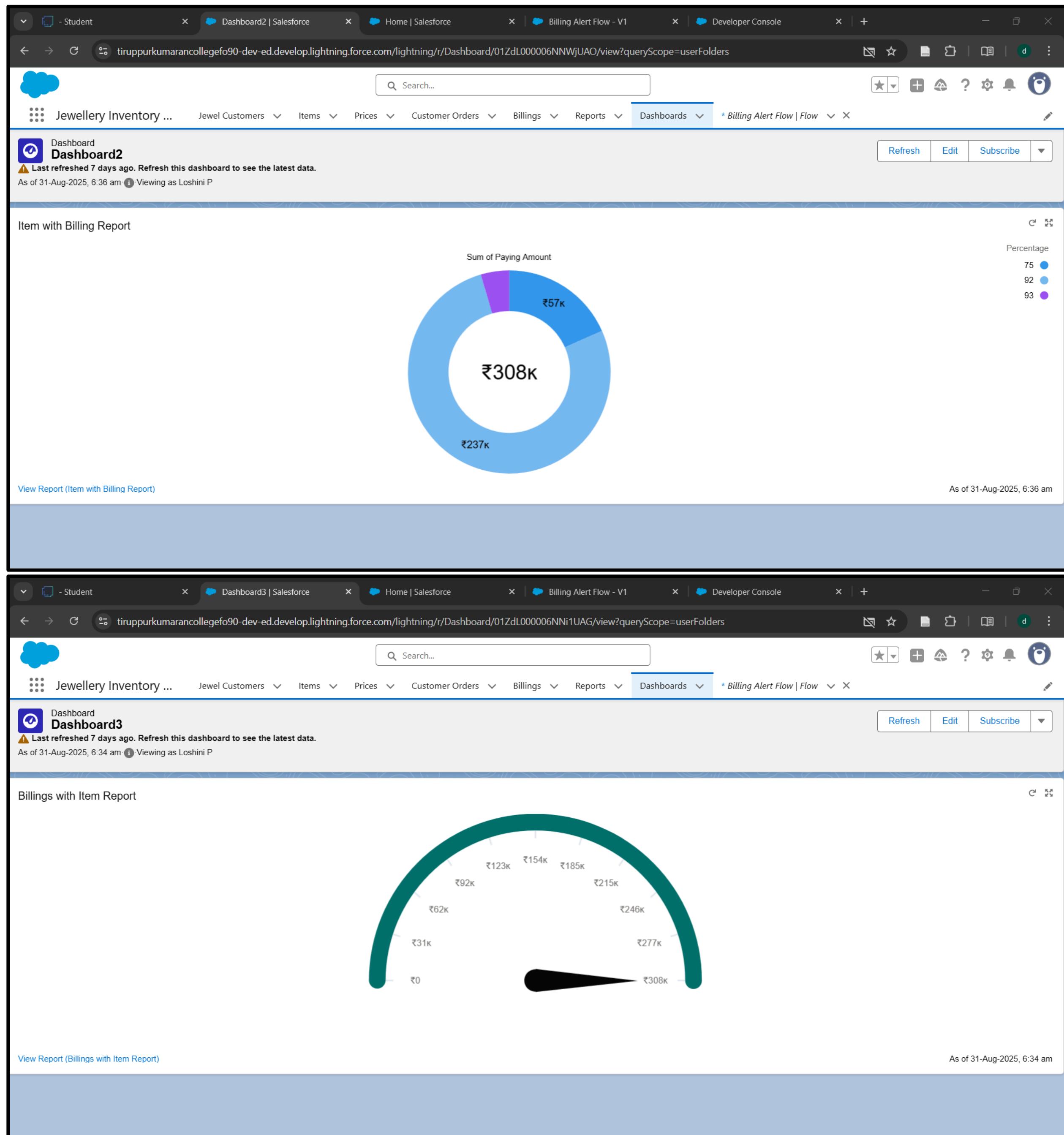
- Customer Id: Customer-01
- Customer: Kavita Reddy
- Item: Item-01
- Order Status: Completed
- Created By: Loshini P. (Last modified on 30/08/2025, 10:29 pm)
- Last Modified By: Loshini P. (Last modified on 30/08/2025, 10:29 pm)

The screenshot shows a Salesforce Billing record detail page. The top navigation bar includes tabs for Jewel Customers, Items, Prices, Customer Orders, Billings (selected), Reports, Dashboards, and Billing Alert Flow. The main content area displays the details for Billing-01, including fields like Item (Item-01, Ornament, CHAIN), Stone weight (CHAIN), Weight (12.00), Gold/Silver Price (₹5,800.00), KDM Charge (₹5,84,40,800), Making Charges (₹3,600.00), Stones/other price (₹0.00), Total Amount (₹5,84,44,412), and Amount. The Owner is listed as Loshini P.

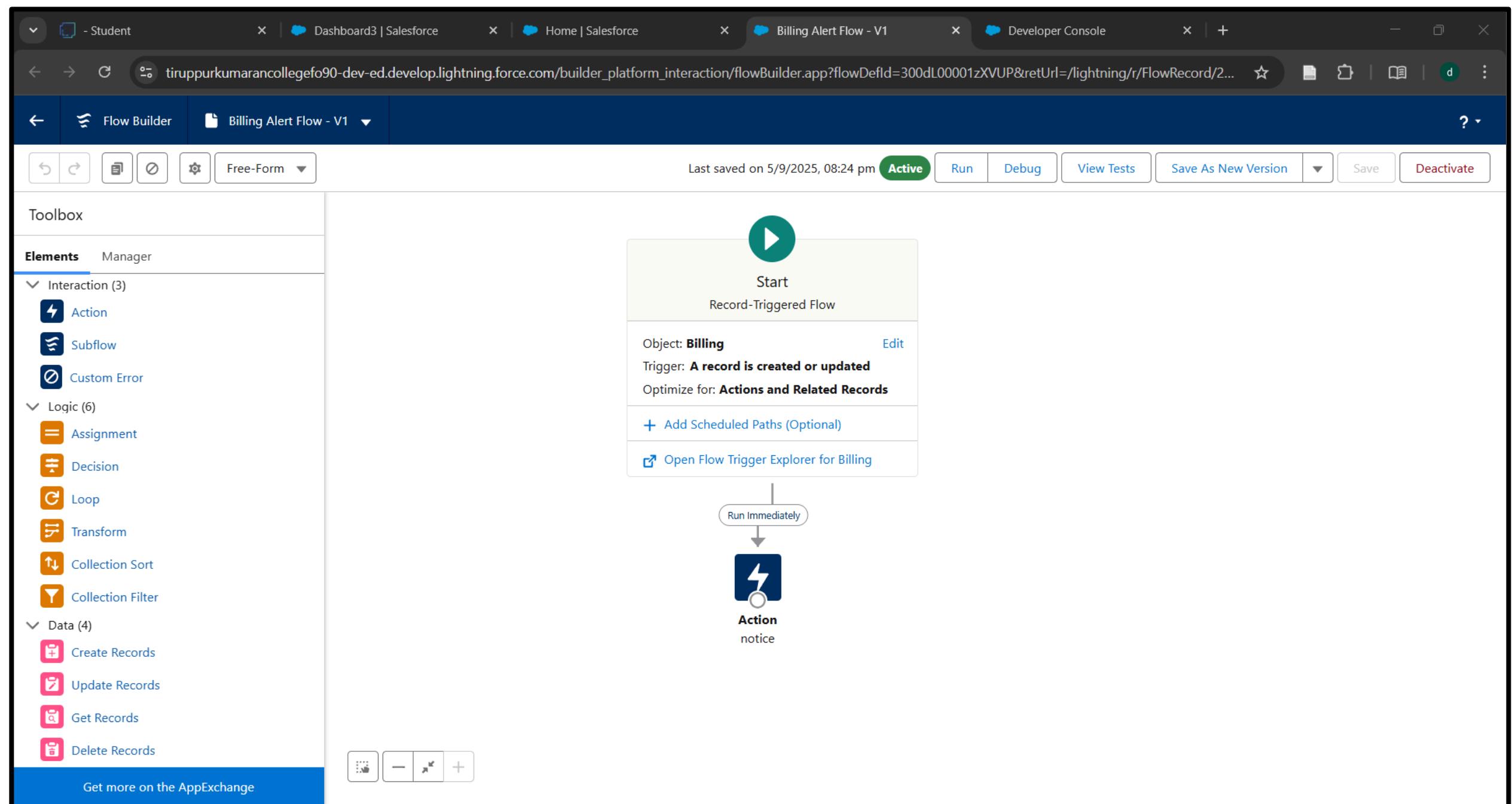
□ Created reports and dashboards for jewel inventory system

The screenshot shows the Salesforce Reports section. The top navigation bar includes tabs for Recent, Home, Billing Alert Flow - V1, Developer Console, and New Tab. The main content area displays a list of recent reports under the 'Recent' tab. The table columns include Report Name, Description, Folder, Created By, Created On, and Subscribed. The reports listed are: Prices Report, Customer order Report, Billings with Item Report, and Item with Billing Report, all created by Loshini P on 30/8/2025.

| Report Name | Description | Folder | Created By | Created On | Subscribed |
|---------------------------|-----------------|-----------|---------------------|------------|------------|
| Prices Report | Private Reports | Loshini P | 30/8/2025, 10:57 pm | | |
| Customer order Report | Private Reports | Loshini P | 30/8/2025, 11:52 pm | | |
| Billings with Item Report | Private Reports | Loshini P | 30/8/2025, 11:56 pm | | |
| Item with Billing Report | Private Reports | Loshini P | 30/8/2025, 11:29 pm | | |



□ Created flow output



CONCLUSION

The CRM application for jewellery management effectively streamlines customer handling, sales, and inventory processes while enhancing customer relationships. It provides a reliable and scalable solution that supports business growth, improves efficiency, and strengthens customer loyalty in the jewellery industry.

APPENDIX

- **SourceCode:** Provided in Apex Classes

Trigger handler:

UpdatePaidAmountTriggerHandler

```
public class UpdatePaidAmountTriggerHandler {
    public static void handleBeforeInsert(List<Billing__c> newBillings) {
        for(Billing__c billing : newBillings) {
            billing.Paid_Amount__c = billing.Paying_Amount__c;
        }
    }
}
```

```
public static void handleBeforeUpdate(Map<Id,  
Billing__c>oldBillingsMap, List<Billing__c>updatedBillings){  
    for(Billing__c billing:updatedBillings){  
        Billing__c oldBilling=oldBillingsMap.get(billing.Id);  
        Decimal oldPaidAmount=oldBilling.Paid_Amount__c;  
        billing.Paid_Amount__c = oldPaidAmount +  
            billing.Paying_Amount__c;  
    }  
}
```

UpdatePaidAmountTrigger

```
trigger UpdatePaidAmountTrigger on Billing__c (before insert, before  
update){  
    if(Trigger.isInsert){  
        UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new)  
    ;  
    }else if(Trigger.isUpdate){  
        UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.old  
Map, Trigger.new);  
    }  
}
```

