

CRM APPLICATION FOR JEWEL MANAGEMENT - ADMIN

Shruti Choudhary

2100290210086

PROJECT OVERVIEW

Jewel Inventory System:

- A comprehensive software solution for managing jewellery store/manufacturer inventory and sales.
- Aims to streamline processes, track inventory, and maintain accurate records.

Objectives:

- Improve inventory management efficiency.
- Enhance sales processes and data accuracy.
- Provide a user-friendly interface for better user experience.



LEARNING OUTCOMES

Real-Time Salesforce Project:

- Gained practical experience in data modelling and creating applications.
- Learned user interface customization techniques.

Key Features:

- Objects & Relationships in Salesforce: Understanding the structure and linking data.
- Formula fields, Validation rules, and Field dependencies: Automating data validation and dependencies.
- Record Types and Cross Object Formula Fields: Customizing data input and display.



CORE FUNCTIONALITIES

Tabs and Navigation:

- Types of Tabs: Custom, Web, Visualforce, Lightning Component, Lightning Page.
- Use Case: Creating objects and tabs for efficient jewel data management.

Fields:

- Standard Fields vs. Custom Fields: Defining data storage structure.
- Use Case: Implementing fields to capture specific data relevant to jewels.



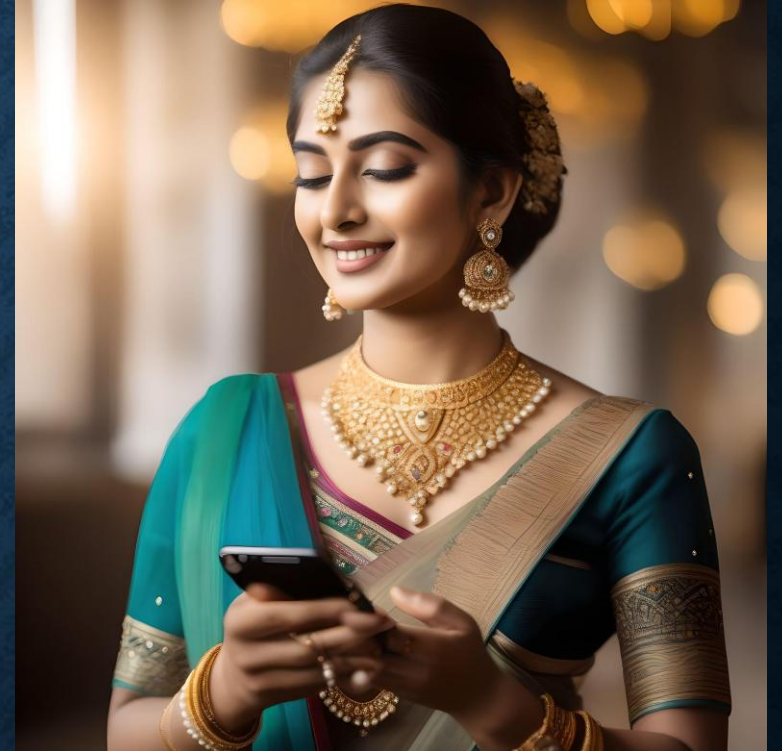
USER MANAGEMENT

Profiles:

- Standard Profiles: Predefined settings and permissions.
- Custom Profiles: Tailored to specific user roles and responsibilities.
- Use Case: Differentiating users based on their roles and access levels within the system.

Roles:

- Defining user visibility and data access based on their position.
- Use Case: Assigning roles to users, ensuring proper data security and accessibility.



CUSTOMIZATION AND REPORTING

Page Layouts:

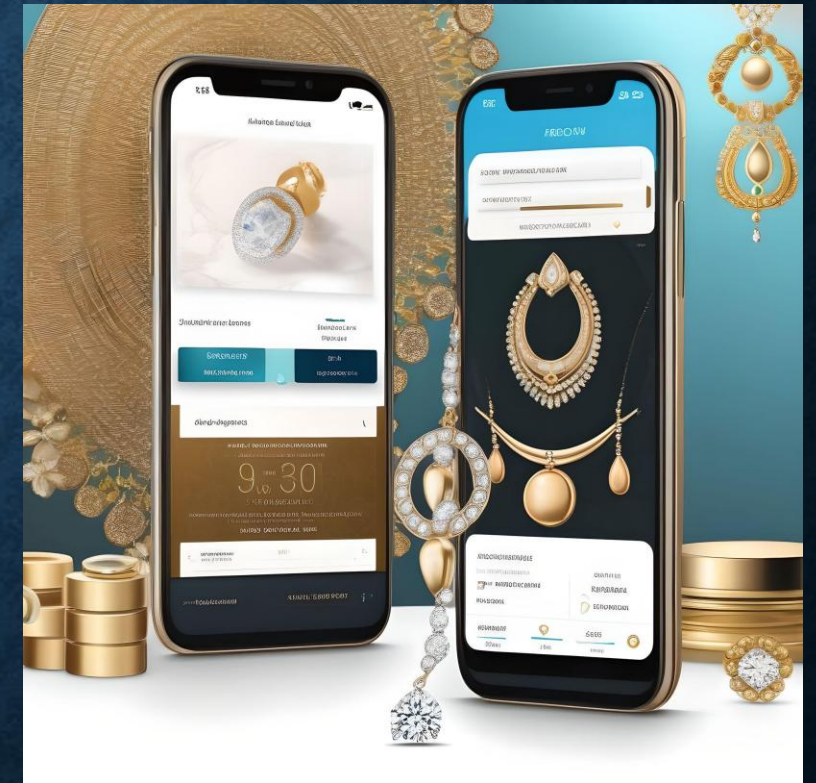
- Customizing the design for a more intuitive user experience.
- Arranging fields, related lists, and custom links.

Record Types:

- Creating different page layouts for different data entry needs.
- Use Case: Tailoring forms for gold and silver records.

Reports & Dashboards:

- Visualizing data for business insights.
- Use Case: Reporting on gold and silver items, customer orders, and billing for decision-making.



AUTOMATION AND CONCLUSION

Flows:

- Automating business processes such as data collection and updates.
- Use Case: Implementing flows for streamlined processes and guided interactions.

Conclusion:

- Summary of project achievements and key learnings.
- Future improvements: Enhancing features and user experience.



Thank You