

Project Title : CRM APPLICATION JEWELLERY MANAGEMENT ADMIN

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1. Project Overview

The Jewelry Management CRM Application is designed to help jewelry businesses manage their customer relationships, sales, and inventory more efficiently. The application will provide a centralized platform for administrators to manage customer data, track sales, and analyze business performance. Key features include customer management, inventory management, sales management, reporting and analytics, and user management. The application will enable administrators to generate reports, analyze data, and create custom dashboards to track key performance indicators (KPIs). By streamlining business operations and providing valuable insights, the Jewelry Management CRM Application aims to help jewelry businesses improve customer satisfaction, increase sales, and drive growth.

Key features of jewel customers:

1. Customer Management:

Store customer contact information and purchase history

Segment customers based on demographics, purchase behavior, and preferences

Assign customer relationships to sales representatives

2. Inventory Management:

Track jewelry inventory levels, including stock quantities and product details

Manage inventory across multiple locations (e.g., stores, warehouses)

Automate inventory updates based on sales and purchases

3. Sales Management:

Record and track sales transactions, including customer information and product details

Generate sales reports and analytics to inform business decisions

Integrate with payment gateways for seamless transaction processing

4. Reporting and Analytics:

Generate reports on sales performance, customer behavior, and inventory levels

Analyze data to identify trends, opportunities, and challenges

Create custom dashboards for administrators to track key performance indicators (KPIs)

5. User Management:

-Create and manage user accounts for administrators, sales representatives, and customers

2.OBJECTIVES:

In our CRM Application jewellery management admin were are created billings and also flows and also we created the email notification we also created the(**Jewel customer, items , customer order, prices and bilings also Reports and dashboard in this jewellery invetory system app**) we achived this project

There is few objectives having:

1. **Enhance Customer Experience:** Provide a centralized platform to manage customer interactions, preferences, and purchase history to deliver personalized experiences.
2. **Streamline Sales and Inventory Management:** Automate sales tracking, inventory management, and reporting to reduce manual errors and improve operational efficiency.
3. **Improve Sales Performance:** Analyze customer behavior, sales trends, and market insights to identify opportunities and optimize sales strategies.
4. **Increase Customer Retention:** Implement effective customer segmentation, targeting, and communication strategies to build loyalty and retain customers.
5. **Gain Data-Driven Insights:** Provide actionable analytics and reporting to inform business decisions, identify areas for improvement, and measure performance.

3.Salesforce Key Features and Concepts Utilized

Salesforce Key Features:

1. **Objects:** Utilize standard and custom objects (e.g., **jewel customer items, prices, billings ,customer order**) to store and manage data.
2. **Fields:** We created the fields on the objects like jewel customer and item we created the fields on it in jewel customer fields like streer state and also created lookup realtionship with jewel customer and the aslo created the master detail lookup realtionship
3. **page layout :** in the page layout we created the page layout of gold and page layout of silver we created this two page layout in item object

4. workflow : in this work flow we created the billing object and also email body and subject receipt list and activation this flow body of billing object and we created the trigger flow in start user.

5.Validation rule: in this validation rule we created the postal code validation rule also validation rule for jewel customer in the jewel customer object like that we also created the validation rule of on item object that was validation rule of item we create like this two validation rule.

6. Roles: in this role we created the gold smith role and assign this role with ceo and add the worker in this role of hierarchy and assign this one in under the gold smith

7. Profile : this profile consume this users profile like that created a gold smith profile and worker profile in the project.

8. Api and integration : this key features commonly add and automatically generated the api names of like reports and dashboards and in email notification that is commonly entering the unique name

9. Jewelry Management Admin Specific Features

1. Inventory Management: Track jewelry inventory, including stock quantities, product details, and locations.

2.Customer Segmentation: Segment customers based on demographics, purchase behavior, and preferences.

3. Sales Performance Analytics: Analyze sales performance, including sales trends, customer behavior, and market insights.

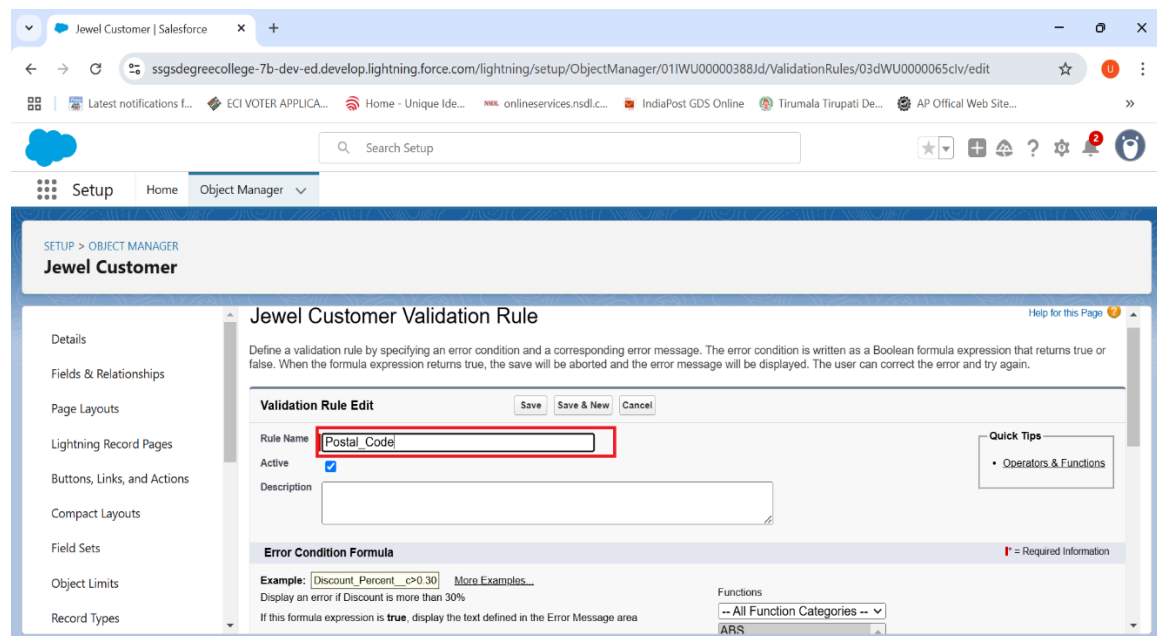
4. Jewelry Product Catalog: Manage a catalog of jewelry products, including product details, images, and pricing.

4.Detailed Steps to Solution Design

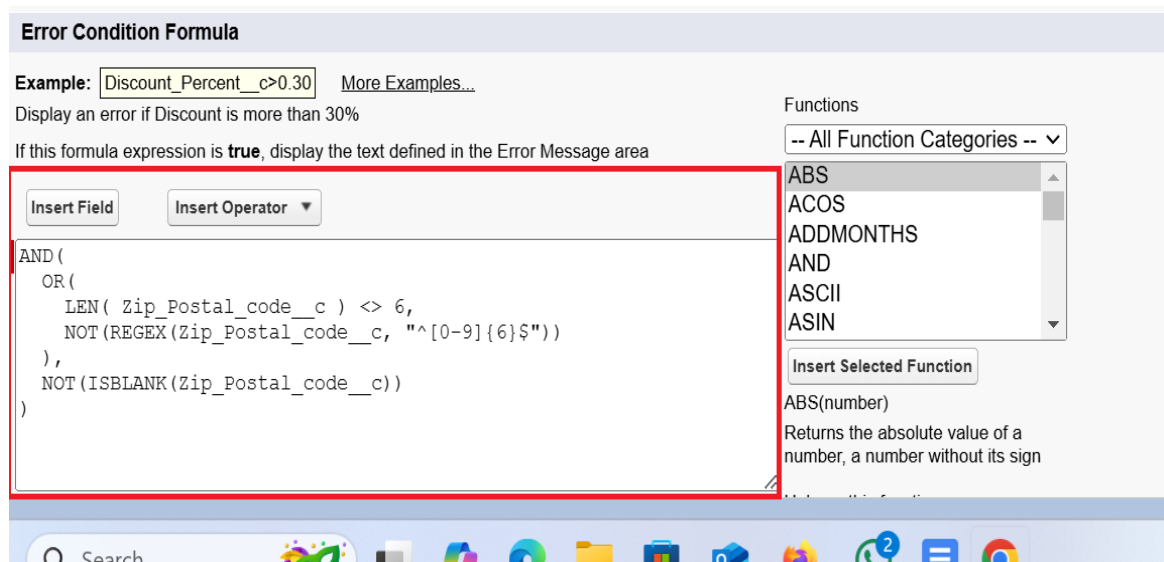
Here we create the validation rules in the jewel customer objects and also here item object also created and login users

In a data security has the data is privacy and also created the flows and reports also

Here we created the validation rule of jewel customer of postal code and validation rule jewel customer.



Now the errors code and syntax of the jewel customer validation rule



The error message of jewel customer of postal code

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is **true**

Error Message Must contain 6 digits

This error message can either appear at the top of the page or below a specific field on the page

Error Location ☐ Top of Page ☒ Field **Zip/Postal code**

Save Save & New Cancel

Now we also created the validation rule of jewel customer

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Jewel Customer

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types

Jewel Customer Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit Save Save & New Cancel

Rule Name ValidationRule_For_JewelCustomerObject

Active ☒

Description

Error Condition Formula

Example: Discount_Percent__c>0.30 More Examples...
Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

Functions -- All Function Categories --

Error code and syntax of the validation rule of jewel customer

Error Condition Formula

Example: Discount_Percent__c>0.30 More Examples...
Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

Insert Field Insert Operator

OR(ISBLANK(City__c), ISBLANK(Country__c), ISBLANK(Phone__c), ISBLANK(State__c), ISBLANK(Street__c))

Functions -- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

ABS(number)
Returns the absolute value of a number, a number without its sign

Error message of the validation rule of the jewel customer

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is **true**

Error Message

Please fill Required fields

This error message can either appear at the top of the page or below a specific field on the page

Error Location

☒ Top of Page
☐ Field

Save

Save & New

Cancel

Now the item object validation rule

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

Item Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Save

Save & New

Cancel

Rule Name

ValidationRule_For_Item

Active

☒

Description

Error Condition Formula

Example: Discount_Percent__c>0.30 More Examples...

Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area.

Functions

-- All Function Categories --

Quick Tips

- Operators & Functions

Errors code of syntax of the condition formula

Error Condition Formula

Example: Discount_Percent__c>0.30 More Examples...

Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

Insert Field

Insert Operator

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))

Functions

-- All Function Categories --

ABS

ACOS

ADDMONTHS

AND

ASCII

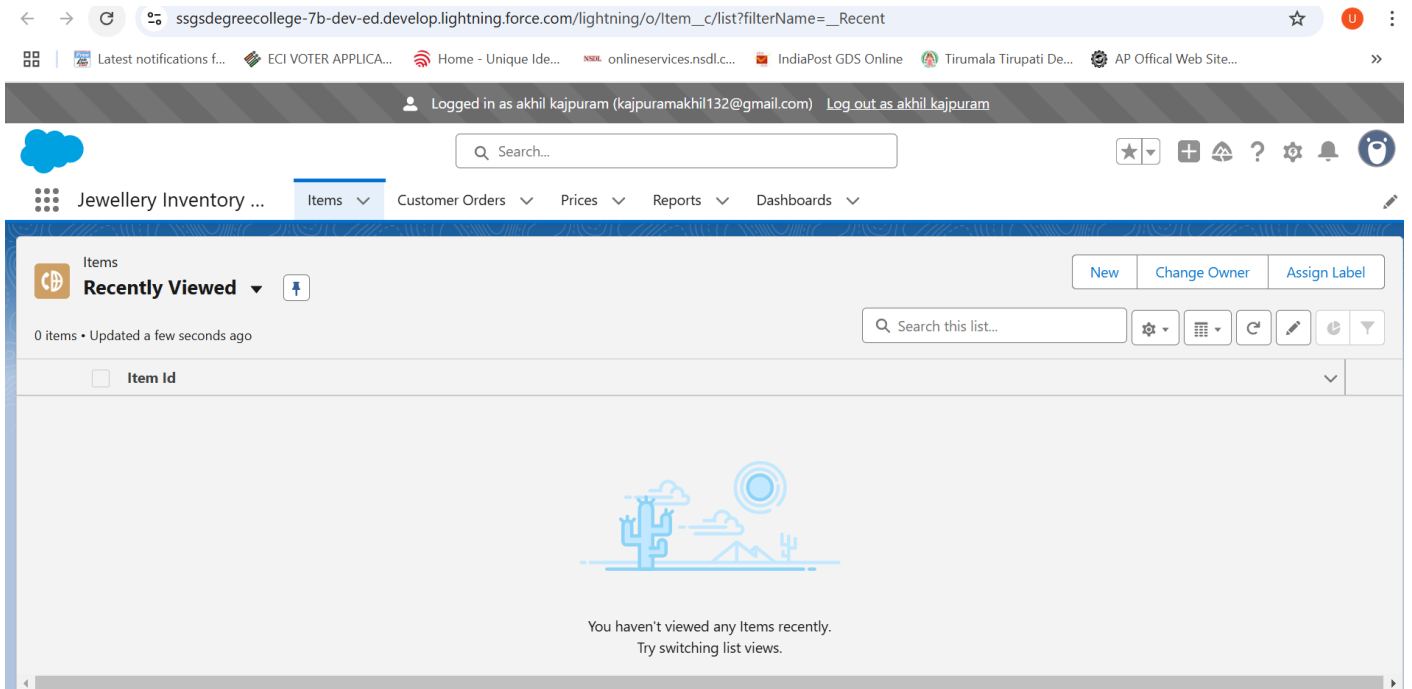
ASIN

Insert Selected Function

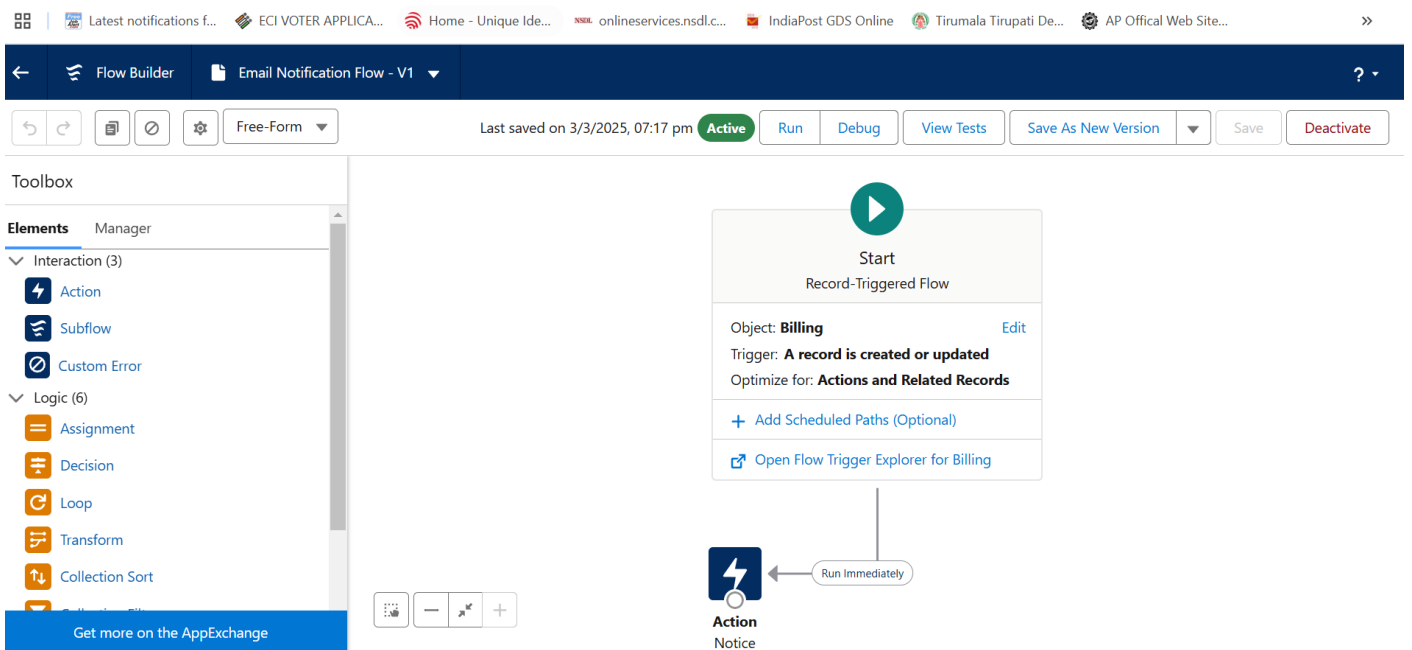
ABS(number)

Returns the absolute value of a number, a number without its sign

Error message of the validation rule of item



We also created the email notification trigger flow



Here the report also **prices report**

← → ↻ ssgsdegreecollege-7b-dev-ed.develop.lightning.force.com/lightning/r/Report/00OWU00000AychN2AR/view?queryScope=userFolders ☆ U ⋮

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Jewellery Inventory ... Jewel Customers ▾ Items ▾ Customer Orders ▾ Prices ▾ Billings ▾ Reports ▾ Dashboards ▾

Report: Prices
Prices Report [Enable Field Editing](#) 🔍 [Add Chart](#) ⌵ ↺ Edit ▾

Total Records: 6 Total Gold Price: ₹4,70,000.00000 Total Silver Price: ₹3,60,000.00000

	Price: Price ID ▾	Gold Price ▾	Silver Price ▾
1	P-09	₹80,000.00000	₹70,000.00000
2	P-08	₹80,000.00000	₹70,000.00000
3	P-10	₹90,000.00000	₹10,000.00000
4	P-11	₹80,000.00000	₹70,000.00000
5	P-14	₹80,000.00000	₹70,000.00000
6	P-16	₹60,000.00000	₹70,000.00000
7		₹4,70,000.00000	₹3,60,000.00000

Billing with item report

← → ↻ ssgsdegreecollege-7b-dev-ed.develop.lightning.force.com/lightning/r/Report/00OWU00000AychN2AB/view?queryScope=userFolders ☆ U ⋮

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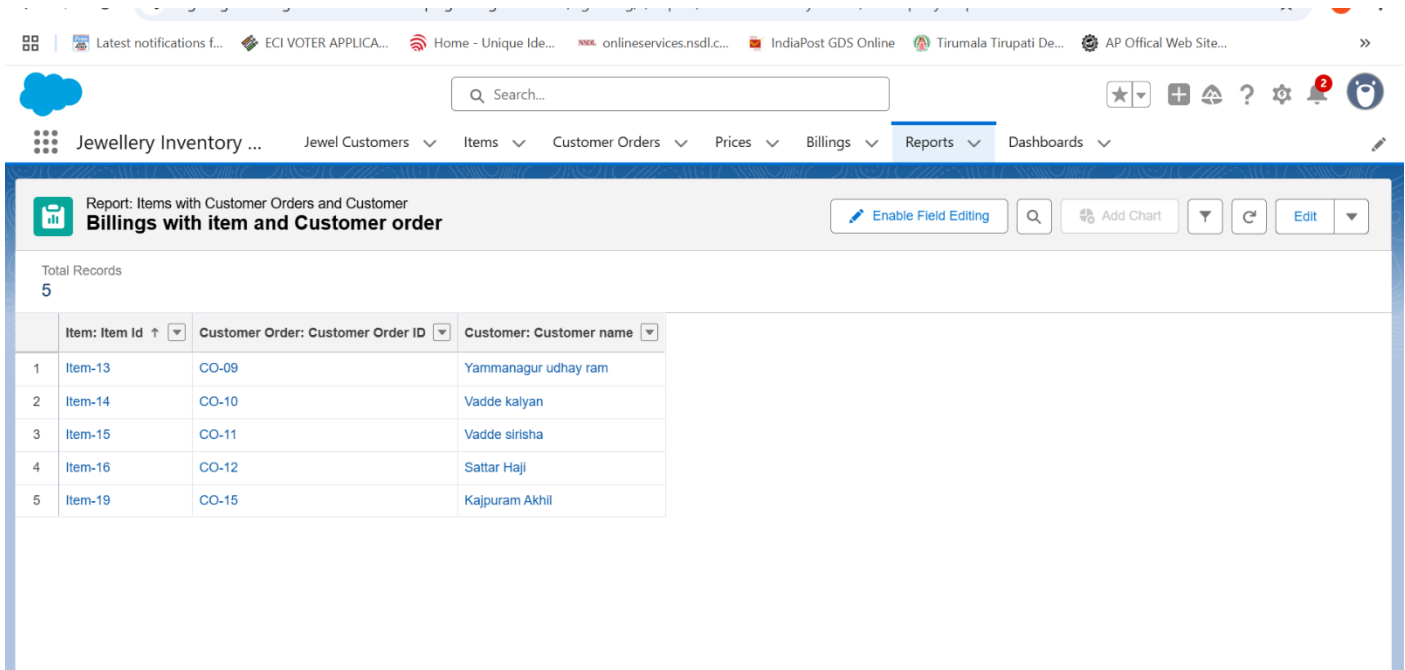
Jewellery Inventory ... Jewel Customers ▾ Items ▾ Customer Orders ▾ Prices ▾ Billings ▾ Reports ▾ Dashboards ▾

Report: Billings with Item
New Billings with item Report [Enable Field Editing](#) 🔍 [Add Chart](#) ⌵ ↺ Edit ▾

Total Records: 5 Total Amount: ₹3,36,14,90,000.00 Total Total Amount: ₹3,74,95,37,000 Total KDM Charge: ₹33,61,49,000 Total Gold/Silver Price: ₹33,070.00 Total Making Charges: ₹5,18,48,000.00 Total Stone weight: 80,030.00 Total Stones/other price: ₹50,000.00

<input type="checkbox"/> Item: Item Type ↑ ▾	Billing: Billing ID ▾	Item: Item Id ▾	Amount ▾	Total Amount ▾	KDM Charge ▾	Gold/Silver Price ▾	Making Charges ▾	Stone weight ▾	Stones/other price
<input type="checkbox"/> Gold (4)	B-07	Item-13	₹5,60,000.00	₹6,50,000	₹56,000	₹8,000.00	₹24,000.00	10.00	₹10,000.00
	B-08	Item-14	₹5,60,000.00	₹6,50,000	₹56,000	₹8,000.00	₹24,000.00	10.00	₹10,000.00
	B-09	Item-15	₹72,00,00,000.00	₹81,90,10,000	₹7,20,00,000	₹9,000.00	₹2,70,00,000.00	10,000.00	₹10,000.00
	B-10	Item-16	₹2,63,96,70,000.00	₹2,92,76,47,000	₹26,39,67,000	₹8,000.00	₹2,40,00,000.00	10.00	₹10,000.00
Subtotal			₹3,36,07,90,000.00	₹3,74,79,57,000	₹33,60,79,000	₹33,000.00	₹5,10,48,000.00	10,030.00	₹40,000.00
<input type="checkbox"/> Silver (1)	B-13	Item-19	₹7,00,000.00	₹15,80,000	₹70,000	₹70.00	₹8,00,000.00	70,000.00	₹10,000.00
Subtotal			₹7,00,000.00	₹15,80,000	₹70,000	₹70.00	₹8,00,000.00	70,000.00	₹10,000.00
Total (5)			₹3,36,14,90,000.00	₹3,74,95,37,000	₹33,61,49,000	₹33,070.00	₹5,18,48,000.00	80,030.00	₹50,000.00

Billing item with customer order and customer name



Report: Items with Customer Orders and Customer Billings with item and Customer order

Total Records: 5

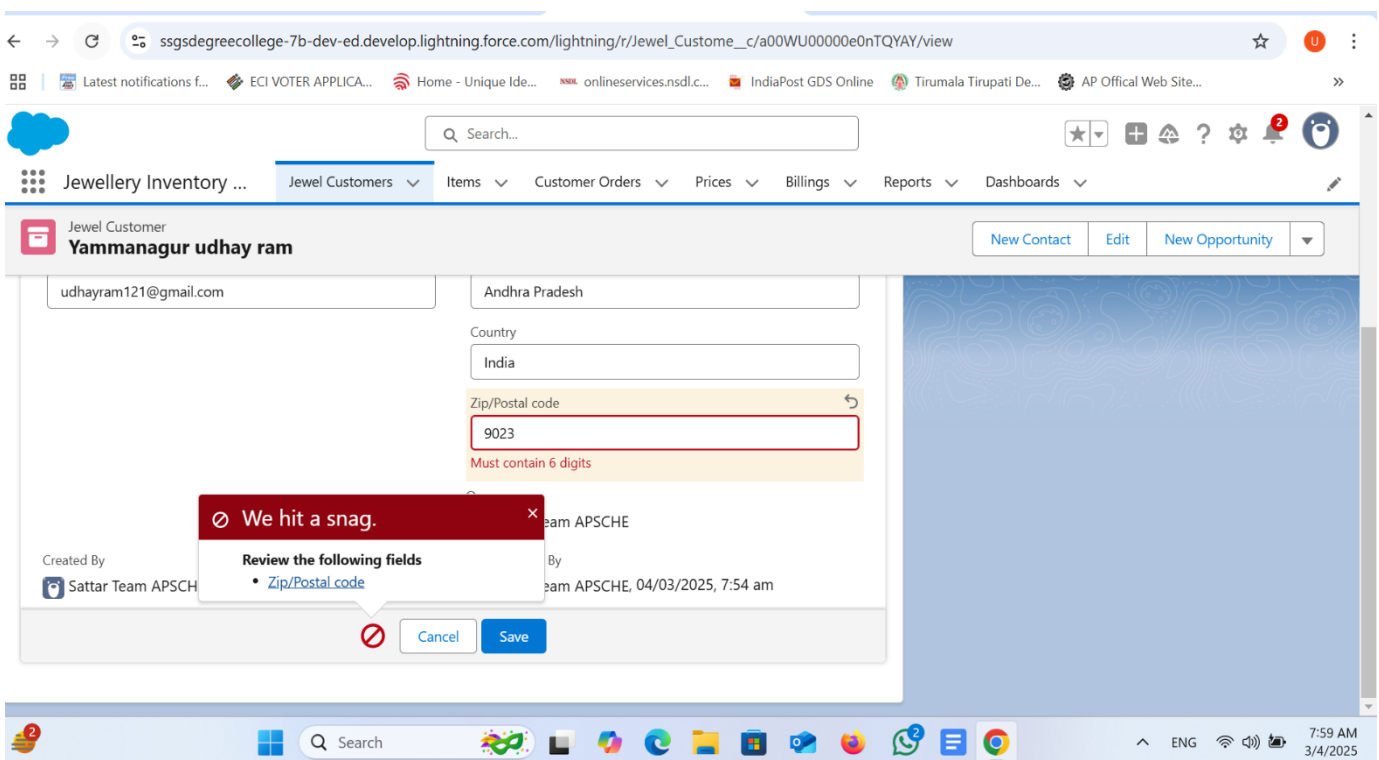
	Item: Item Id	Customer Order: Customer Order ID	Customer: Customer name
1	Item-13	CO-09	Yammanagur udhay ram
2	Item-14	CO-10	Vadde kalyan
3	Item-15	CO-11	Vadde sirisha
4	Item-16	CO-12	Sattar Haji
5	Item-19	CO-15	Kajpuram Akhil

5. Testing and Validation

Here we tested the validation working or not in the jewel customer and item objects

Here we identified the testinf and vaildation rule

In the jewel customer object we tested vaildation rule of postal code



Jewel Customer: Yammanagur udhay ram

udhayram121@gmail.com

Andhra Pradesh

Country: India

Zip/Postal code: 9023

Must contain 6 digits

We hit a snag. Review the following fields: Zip/Postal code

Created By: Sattar Team APSCH

By: team APSCH, 04/03/2025, 7:54 am

Cancel Save

And we reslove the error of zip postal code

Jewellery Inventory ...

Jewel Customers

Items

Customer Orders

Prices

Billings

Reports

Dashboard

Jewel Customer

Yammanagur udhay ram

New Contact

udhayram121@gmail.com

Andhra Pradesh

Country

India

Zip/Postal code

902321

Must contain 6 digits

Owner

Sattar Team APSCHE

Created By

Sattar Team APSCHE, 04/03/2025, 7:54 am

Last Modified By

Sattar Team APSCHE, 04/03/2025, 7:54 am

Cancel

Save

Now we saved the record

← → ↺

ssgsdegreecollege-7b-dev-ed.develop.lightning.force.com/lightning/r/Jewel_Customer__c/a00WU00000e0nTQYAY/view

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Jewellery Inventory ...

Jewel Customers

Items

Customer Orders

Prices

Billings

Reports

Dashboards

Jewel Customer

Yammanagur udhay ram

New Contact

Edit

New Opportunity

Customer name

Yammanagur udhay ram

Street

6/555-A BENCHI KOTTA

Phone

07569122775

City

Anantapur

Email

udhayram121@gmail.com

State

Andhra Pradesh

Country

India

Zip/Postal code

902321

Owner

Sattar Team APSCHE

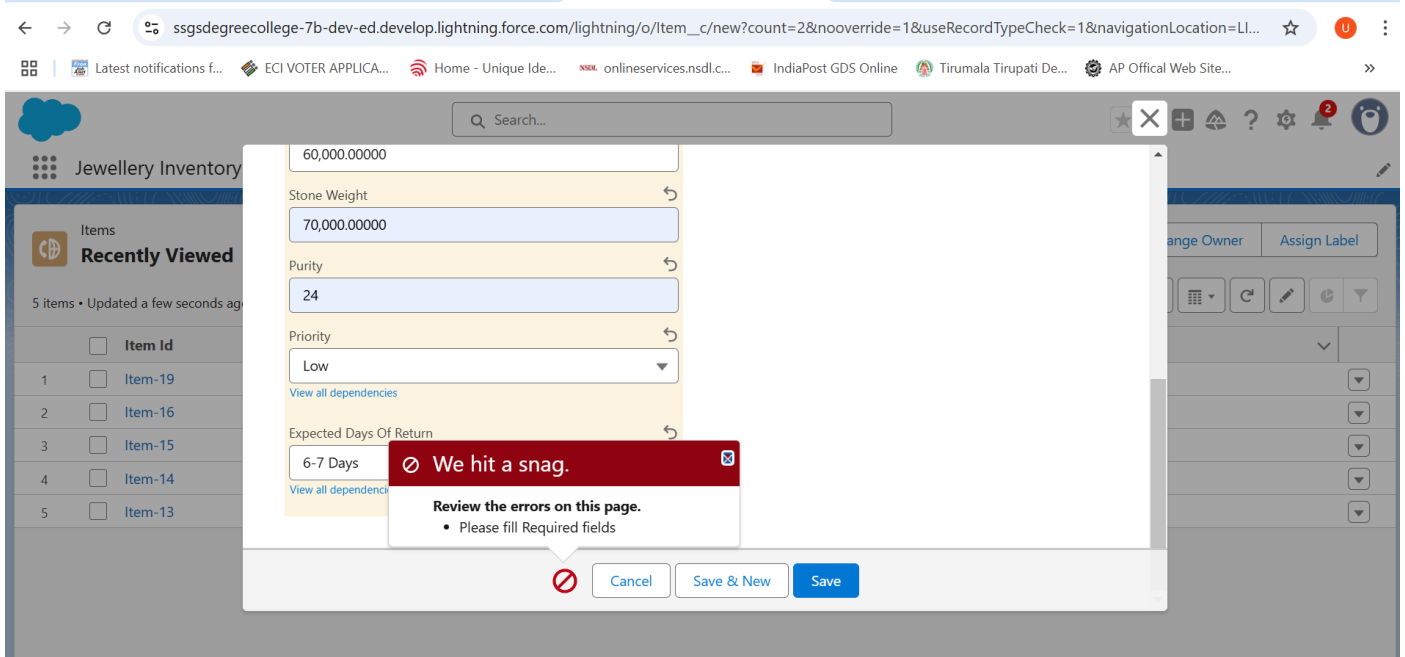
Created By

Sattar Team APSCHE, 04/03/2025, 7:54 am

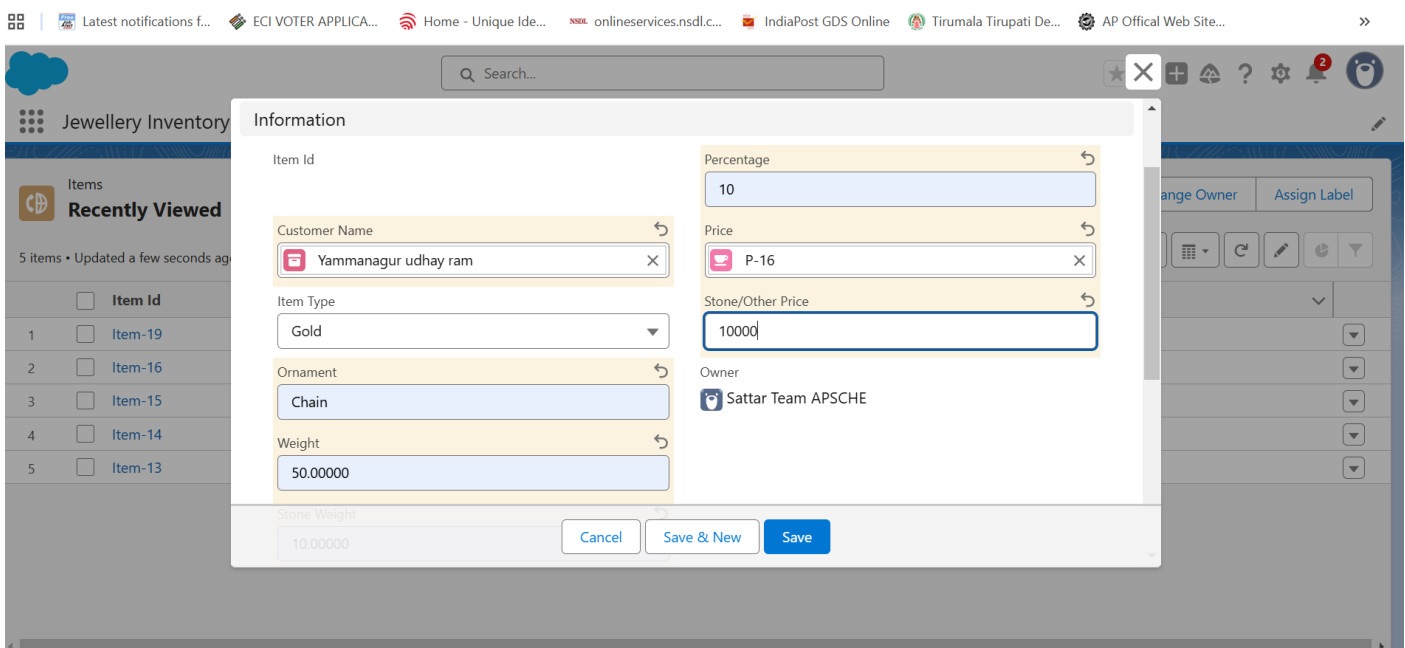
Last Modified By

Sattar Team APSCHE, 04/03/2025, 7:57 am

Now in the item object validation rule of the item the error message



Now we resolved the problem of error message in the item object



Now saving the item record

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Jewellery Inventory ... Jewel Customers Items Customer Orders Prices Billings Reports Dashboards

Item Item-21 New Contact Edit New Opportunity

Related	Details
Item Id	Percentage
Item-21	10
Customer Name	Price
Yammanagur udhay ram	P-16
Item Type	Gold Price
Gold	₹6,000.00
Ornament	Purity Gold Price
Chain	₹6,000.00
Weight	KDM
50.00000	₹24,000
Total Weight	Making Charges
40.000	₹15,000

8:03 AM 3/4/2025

We also tested the email notification and trigger flow

ssgsdegreecollege-7b-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301WU00000IISQqYAM

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Flow Builder Email Notification Flow - V1

Last saved on 3/3/2025, 07:17 pm Active Run Debug View Tests Save As New Version Save Deactivate

Toolbox

Elements Manager

Interaction (3)

- Action
- Subflow
- Custom Error

Logic (6)

- Assignment
- Decision
- Loop
- Transform
- Collection Sort

Get more on the AppExchange

Start Record-Triggered Flow

Object: **Billing** Edit

Trigger: **A record is created or updated**

Optimize for: **Actions and Related Records**

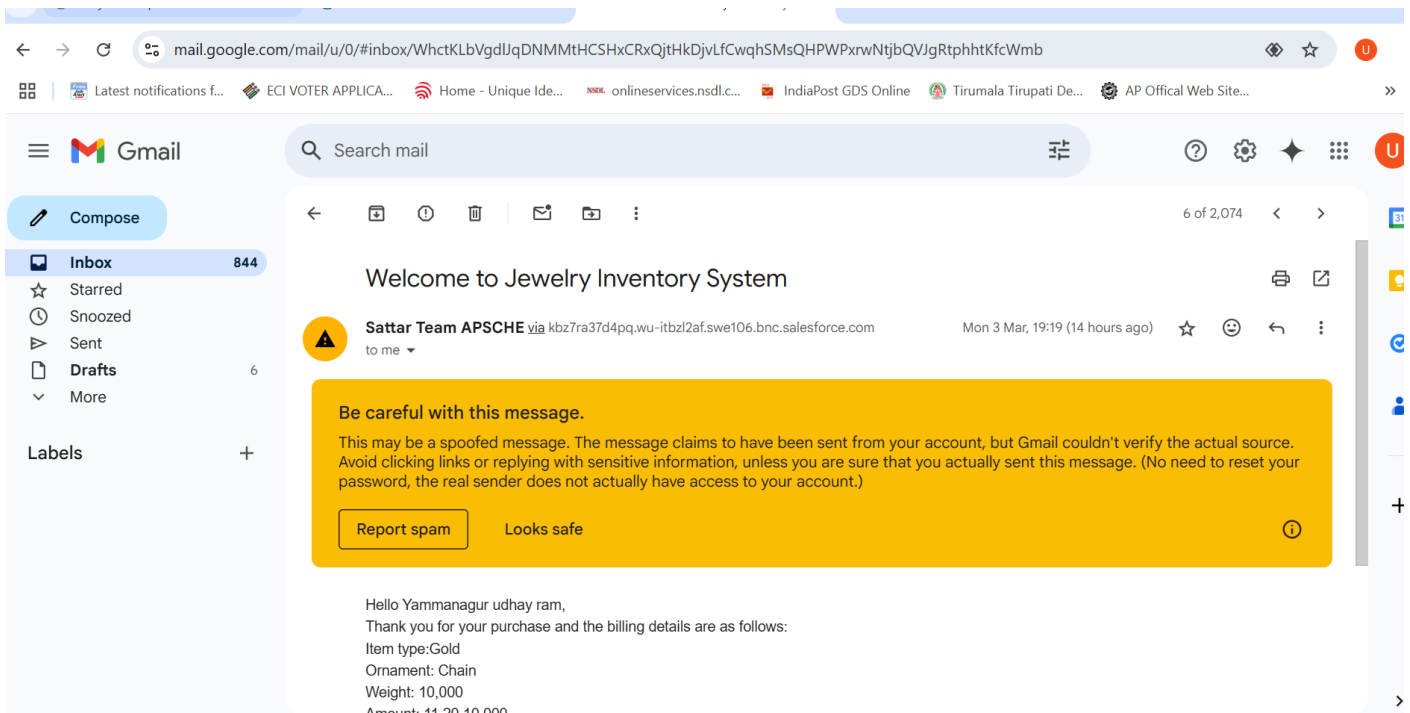
+ Add Scheduled Paths (Optional)

Open Flow Trigger Explorer for Billing

Run Immediately

Action Notice

The mail notifiacation



6.Key Scenarios Adressed by saleforce in the implemantion project

Creating objects: like the jewel customer, and item , and customer order, prices, billings and also created the fields in those object

Page layout : in the page layout we created the page layout of gold and silver scenario in the item layout

Validation rule : vaildation rule must contains the must condition field and for the error message

Reports and analysis : here the reports we created the billings with item and prices and billing with item and customer order and customer name

Profile and users : In this profile we created the worker profile and gold smith profile and we assign the users with worker profile anf gold smith

Role and hireachy : this roles contains the gold smith profile and worker assinned in the role of ceo

Flows : in the flows having trigger flow and also created the email notification

Dashboard : in this dashboard created the billing with item and prices also created and billing with item and billing with item and customer order customer name

Lighting app : we created the lighting app of app manager and we created the jewellery investory system

Fields : in this scenarios we created the lookup realtionship and master details relationship and also created the fields of the object like street and state in jewel customer and items and prices and biling object

Login users : In this login users we created two users like as worker profile and gold smith profiler and login in the users has given the persimission to read and create and edit also view all reports and view all records and modify all records

7.Conclusion

The implementation of Salesforce in the Jewelry Management Admin project has addressed key scenarios in customer management, sales force automation, marketing automation, customer service and support, inventory and order management, and reporting and analytics. By leveraging Salesforce's features and capabilities, the project has enabled the jewelry business to streamline its operations, enhance customer experiences, and gain data-driven insights to inform business decisions. The successful implementation of Salesforce has positioned the business for growth, improved efficiency, and increased competitiveness in the market.