

# SALESFORCE ADMINISTRATION

## **Project Title :- CRM JEWELRY**

**COLLEGE:-** Sri shankrananda Giri Swamy Degree college

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## **(1) Project Overview:-**

A “CRM Jewelry Management project” aims to achieve several key objectives that ultimately contribute to the growth and efficiency of a jewelry business. The system specifically designed for jewelry business, allowing them to effectively track customer interactions, manage sales leads, and personalize marketing efforts optimize customer relationship and boost sales within the jewelry industry.

- Capture detailed customer information including demographics, purchase history, preferred jewelry types, special occasions, and contact details
- Store and update customer data in real time to maintain accuracy

*the purpose of a CRM (Customer Relationship Management) system is to help businesses manage and improve their interactions with customers and potential customers. This overarching goal breaks down into several key objectives.*

CRM, or Customer Relationship Management, is a multifaceted concept that's essential for modern businesses. It's not just a piece of software it's a strategic approach to how a company interacts with its customers.

The relationship between CRM (Customer Relationship Management) and CLV (Customer Lifetime Value) is very strong. CRM systems provide the tools and data necessary to effectively calculate, track, and ultimately increase CLV.

## (2) Objectives :-

### **Business Goals :**

The primary objectives of a Customer Relationship Management (CRM) system are to enhance customer satisfaction, increase sales, improve customer retention, and build strong customer loyalty by effectively managing customer interactions and data across all touchpoints, ultimately achieving business goals like increased revenue, market share, and profitability.

CRM (Customer Relationship Management) systems serve a variety of business goals, all designed to improve customer interactions and drive growth.

### **The four main objectives of a CRM**

- ❖ Increase customer retention.
- ❖ Shorten the sales cycle.
- ❖ Increase sales.
- ❖ Decrease customer acquisition.

### **Specific outcomes :-**

A CRM implementation for a jewelry business aims to drive tangible results through enhanced customer engagement and operational efficiency. There are unique considerations that will influence the specific outcomes and key deliveries.

### **(3) Salesforce Key Features and Concepts Utilized:-**

**Salesforce is a cloud-based CRM platform that provides various features and concepts to help businesses manage customer relationships, sales, and operations. Here are some key features and concepts utilized in Salesforce**

- ❖ Key features of Salesforce CRM include: contact management, lead management, opportunity management, sales forecasting, reporting and dashboards, automation through workflows, collaboration tools, cloud-based access, mobile accessibility, AI integration, campaign management, and a single source of truth for customer data, allowing businesses to track and manage customer interactions across all channels effectively; with core concepts like lead qualification, opportunity stages, and customer lifecycle management central to the platform.
- ★ We used the following **Objects** :-
  - ❖ Jewel Customer
  - ❖ Items
  - ❖ Billing
  - ❖ Prices
  - ❖ Customer order
- ★ We used **Tabs** such as
  - ❖ Jewel Customer Tab
  - ❖ Item Tab .. Etc.

#### **★ We Created a Lightning App :- Jewellery Inventory System**

##### **➤ We Created Fields such as :-**

- ◆ *Lookup Relationship*
- ◆ *Master-Detailed Relationship*
- ◆ *Text, Phone, Email Fields in Jewel Customer Object*
- ◆ *Number Picklist Fields in Item Object*
- ◆ *Currency Fields in Price Object*
- ◆ *Formula Field (cross object)in Item Object*

- ◆ *Also Created some other Fields.*

## ★ Schema Builder:-

*The schema builder is a simple graphical interface for visualizing and editing the data model of your Org. The schema builder can get all fields from an Object, perform basic impact analysis of changes to an Object, and show all dependencies on an Object.*

→ We Entered object as :-

- ❖ *Jewel Customer*
- ❖ *Items*
- ❖ *Customer order*
- ❖ *Prices*
- ❖ *Billing in Schema Builders*

## ★ Field Dependencies:-

*Field dependency can refer to a cognitive style, a relationship between fields in a dialog, or a dependency injection technique. Field Dependencies are used to create relationships between fields within an object. They allow you to control the visibility and availability of fields based on the values selected in other fields.*

We created New Field Dependencies, controlling as "Priority"& Depending Field as "Expecting Days of Return".

## ★ Validation Rules :-

*A validation rule is one way to restrict input in a table field or a control on a form. Validation text lets you provide a message to help users who input data that is not valid.*

**Created the validation rule for Postal Code field in Jewel Customer object.**

**★ Profiles:**

**We Created 2 Profiles:**

- **Gold Smith profile**
- **Worker profile**

**★ Roles:-**

**Salesforce roles are record-level access controls that define what data a user can see in Salesforce. roles can be used to determine the visibility access of the user and the data they can access in your Salesforce CRM organization.**

**Added Goldsmith role in CEO Role & Added Worker Role which reports to Goldsmith.**

**★ Users: -**

**A user in Salesforce is anyone who logs in to the platform, including employees, customers, partners, and automated users.**

- ★ **Niklaus Mikaelson in Goldsmith Profile**
- ★ **Kol Mikaelson in Worker Profile**
- ★ **2 more Users in Worker Profile**

**★ Page Layouts: -**

**Page layouts control the layout and organization of buttons, fields, s-controls, Visualforce, custom links, and related lists on object record pages. They also help determine which fields are visible, read only,**

*and required. Use page layouts to customize the content of record pages for your users.*

**Created 2 Page layouts in Item object named as: -**

- ❖ “Page Layout for Gold”
- ❖ “Page layout for Silver”

**★ Record Type: -**

*Record Types are a way of grouping many records of one type for that object. These can be applied to any standard or custom object, and allow you to have a different page layout, fields, required fields, and picklist values.*

**Created Record Types in Item Object labeled as Gold & Silver.**

**★ Permission sets: -**

*A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' function.*

**We Created New Permission Sets & Labeled it as “Per to Worker”**  
And in Item Object we enabled Gold & Silver object permission we selected “Read, Edit & Create”. We added Assignments which we used under Worker Profile users.

**★ User Adoption: -**

*User adoption, or onboarding, is the process of customers or new users getting used to a product or service and then deciding to keep using it because it makes a task or goal.*

*In Jewelry Inventory System we created Jewel Customers under Jewel Customer tab. We created some Records under “Item, Prices, Customer orders & Billing”.*

### **★ Reports:-**

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

We created 3 reports:

- Prices Report
- Billings with item and Customer order Report.
- Item with Billings Report

### **★ Dashboards:**

We created dashboards under “Item with Billings Report”, “Billings with item and Customer order Report”, “Prices Report”.

### **★ Flows:**

Flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens

We selected Record Triggered flow and “Selected the Object as a “Billing” in the Drop-down list. Selected the Trigger Flow where as “A record is Created or Updated”. Selected the Optimize the flow for: “Actions and Related Records” .

#### **(4) Detailed steps to Solution Design: -**

##### **We created objects:**

- ◆ Jewel customer
- ◆ Item
- ◆ Billings
- ◆ Prices
- ◆ Customer Order

WhatsApp Project Title CRM.docx - Microsoft Word Smartinternz Items | Salesforce

<https://ssgsdegreecollege-8e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS000002yl4X/FieldsAndRelationships/view>

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Items

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

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Billings with item and Customer order	Billings_with_item_and_Customer_order_c	Lookup(Items)		
Created By	CreatedById	Lookup(User)		
Customer Name	Customer_Name_c	Lookup(Jewel Customer)		
Expected Days Of Return	Expected_Days_Of_Return_c	Picklist	Priority	
Gold Price	Gold_Price_c	Formula (Currency)		
Item	Item_c	Picklist		

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<https://ssgsdegreecollege-8e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS000002yktF/FieldsAndRelationships/view>

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Jewel Customer

**Fields & Relationships**  
22 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	Customer_c	Lookup(Jewel Customer)		
Customer Name	Customer_Name_c	Lookup(Jewel Customer)		
Customer Name	Name	Text(80)		
Data type	Data_type_c	Text(20)		

The screenshot shows the Salesforce Object Manager Fields & Relationships page for the Billing object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, Buttons, etc. The main table displays 14 items, sorted by Field Label, with columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table includes rows for Amount, Bi Name, Created By, Gold/Silver Price, Item, KDM Charge, and Last Modified By.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Bi Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Gold/Silver Price	Gold_Silver_Price__c	Formula (Currency)		
Item	Item_c	Lookup(Items)		✓
KDM Charge	KDM_Charge_c	Formula (Currency)		
Last Modified By	LastModifiedById	Lookup(User)		

## We used to 2 Profiles: -

- *Gold Smith Profile*
- *Worker profile*

Screenshot of the Salesforce Setup interface showing the 'Profiles' page.

The page title is 'Profiles' under 'SETUP'. The profile being edited is 'worker'.

Profile Edit details:

- Name: worker
- User License: Salesforce Platform
- Custom Profile: checked

Custom App Settings:

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>
Jewelry Inventory System (Jewelry_Inventory_System)	<input type="checkbox"/>	<input type="radio"/>			

Service Provider Access:

	Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="radio"/>
My Service Journey (standard__MSJApp)	<input checked="" type="checkbox"/>	<input type="radio"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales (standard__Sales)	<input type="checkbox"/>	<input type="radio"/>

System Navigation Bar:

- Type here to search
- File
- Home
- Object Manager
- Help

System Status Bar:

- 18:17
- ENG
- 02-03-2025

Screenshot of the Salesforce Setup interface showing the 'Profiles' page.

The page title is 'Profiles' under 'SETUP'. The profile being edited is 'Gold Smith'.

Profile Edit details:

- Name: Gold Smith
- User License: Salesforce
- Custom Profile: checked

Custom App Settings:

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	My Service Journey (standard__MSJApp)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input type="checkbox"/>	<input type="radio"/>

System Navigation Bar:

- Type here to search
- File
- Home
- Object Manager
- Help

System Status Bar:

- 18:19
- ENG
- 02-03-2025



## ***Lighting App: -***

Jewelry Inventory S... Jewel Customers Items Orders Prices Billings Reports Dashboards

New Import Change Owner Assign Label

Recently Viewed

4 items • Updated a minute ago

	Customer Name ↑
1	Nazma
2	Dharani
3	Mikaelson
4	Anitha

Type here to search 18:24 02-03-2025

## ***Roles: -***

Screenshot of the Salesforce Setup interface showing the Roles page for the "Gold Smith" role.

**Role Detail:**

- Label:** Gold Smith
- This role reports to:** SVP\_Sales & Marketing
- Modified By:** Kuniba Sirisha Team
- Opportunity Access:** Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
- Case Access:** Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases

**Users in Gold Smith Role:**

Action	Full Name	Alias	Username	Active
Edit	Niklaus Mikaelson	nmika	sirisha@123gmail.com	<input checked="" type="checkbox"/>

**Help for this Page**

Screenshot of the Salesforce Setup interface showing the Roles home page.

**Creating the Role Hierarchy:**

You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.

**Your Organization's Role Hierarchy:**

- Collaps All Expand All
- SSGS degree college
  - Add Role
    - CEO
    - COO
    - SVP\_Customer Service & Support
    - Customer Support\_International
    - Customer Support\_North America
    - Installation & Repair Services
- EVD Human Resources
  - Add Role

**Help for this Page**

## Users: -

- Niklaus Mikaelson
- Kol Mikaelson

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected in the sidebar. The main page displays the 'User Edit' screen for 'Niklaus Mikaelson'. The user's details are listed in the General Information section, including First Name (Niklaus), Last Name (Mikaelson), Alias (nmika), Email (mugithidharani@gmail.com), Username (sirisha@123gmail.com), and Nickname (User1740557462175510852). The Role is set to 'Gold Smith', User License to 'Salesforce', and Profile to 'Gold Smith'. The Active checkbox is checked. On the right side, there are several inactive checkboxes for various user types like Marketing User, Offline User, Knowledge User, etc.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected in the sidebar. The main page displays the 'User Detail' screen for 'Kol Mikaelson'. The user's details are listed in the User Detail section, including Name (Kol Mikaelson), Alias (kmika), Email (mugithidharani@gmail.com), Username (sirisha@111gmail.com), and Nickname (User17405582722813922863). The Role is set to 'Worker', User License to 'Salesforce Platform', and Profile to 'worker\_profile'. The Active checkbox is checked. On the right side, there are several inactive checkboxes for various user types like Marketing User, Offline User, Knowledge User, etc.

## We created 2-page layouts:

### Page Layouts for Gold & Silver

The screenshot shows the Salesforce Setup interface for creating a page layout. The left sidebar lists various setup categories, and the main area is titled 'Item Layout'. The 'Fields' section displays a grid of fields: Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, Report Charts, Created By, Customer Name, Item Id, Making Charges, Prices, Record Type, Total Weight, Blank Space, Amount, Expected Days Of..., KDM, Ornament, Priority, Silver Price, Weight, and Gold Price, Last Modified By, Percentage, Purity, Stone/Other Price, and Stone Weight. Below the fields, there are sections for 'Highlights Panel' and 'Quick Actions in the Salesforce Classic'.

The screenshot shows the Salesforce Setup interface for creating a page layout. The left sidebar lists various setup categories, and the main area is titled 'Item Layout'. The 'Fields' section displays a grid of fields: Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, Report Charts, Created By, Customer Name, Item Id, Making Charges, Prices, Record Type, Total Weight, Blank Space, Amount, Expected Days Of..., KDM, Ornament, Priority, Silver Price, Weight, and Gold Price, Last Modified By, Percentage, Purity, Stone/Other Price, and Stone Weight. A detailed information panel is open, showing field values for Item Id (GEN-2004-001234), Purity (17), Item (Sample Text), Prices (Sample Text), Record Type (Silver Price), Total Weight (Weight), Gold Price (₹123.45), Customer Name (Sample Text), Ornament (Sample Text), Weight (0.23202), Percentage (64), Stone Weight (0.09811), Stone/Other Price (₹123.45), and Expected Days Of... (Sample Text).

## We created 3 Reports:

### ♦ Prices Report

- ◆ **Item with Billings Report**
- ◆ **Billing with Items & Customer order**

Screenshot of a Salesforce Report Builder interface showing a "Price report" for "Prices".

**Report Preview:**

	Price: Customer Price	Price: Owner Name	Gold Price	Silver Price
1	Price-01	Kuruba Sirisha Team	₹80,000.0000	₹70,000.0000
2	Price-02	Kuruba Sirisha Team	₹80,000.0000	₹70,000.0000
			₹1,60,000.0000	₹1,40,000.0000

**Report Configuration:**

- Groups:** GROUP ROWS, Add group...
- Columns:** Price: Customer Price, Price: Owner Name, # Gold Price, # Silver Price

**Report View:**

**Billings with Item Report**

**Report Summary:**

Total Records	Total Amount	Total Total Amount	Total KDM Charge	Total Making Charges	Total Stones/Other Price	Total Stone Weight
3	₹7,25,600.00	₹9,12,160	₹1,12,560	₹34,000.00	₹40,000.00	40.00

**Billings Data:**

Item: Item Type	Billing: Billing Name	Item: Item Id	Amount	Ornament	Total Amount	KDM Charge	Making Charges	Stones/Other Price	Stone Weight
Gold (2)	Billing-01	Item-01	₹3,20,000.00	Necklace	₹3,77,000	₹32,000	₹15,000.00	₹10,000.00	10.00
	Billing-02	Item-02	₹4,00,000.00	Necklace	₹5,18,000	₹80,000	₹18,000.00	₹20,000.00	10.00
<b>Subtotal</b>			₹7,20,000.00		₹8,95,000	₹1,12,000	₹33,000.00	₹30,000.00	20.00
Silver (1)	Billing-05	Item-03	₹5,800.00	Necklace	₹17,160	₹560	₹1,000.00	₹10,000.00	20.00
<b>Subtotal</b>			₹5,800.00		₹17,160	₹560	₹1,000.00	₹10,000.00	20.00
<b>Total (3)</b>			₹7,25,600.00		₹9,12,160	₹1,12,560	₹34,000.00	₹40,000.00	40.00

**Report Options:**

- Row Counts, Detail Rows, Subtotals, Grand Total
- ENG IN, 11:05, 28-02-2025

Jewelry Inventory S... Jewel Customers Items Orders Prices Billings Reports Dashboards

Report: Billings with Item  
**Billings with item and Customer order**

	Customer Billing: Customer Billing	Item: Customer Name
1	Billing-01	Anitha
2	Billing-02	Mikaelson
3	Billing-03	Dharani
4	Billing-04	Nazma

## Dashboard: -

Jewelry Inventory S... Jewel Customers Items Orders Prices Billings Reports Dashboards

Recent

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Jewel Dashboard	Private Dashboards	Kuruba Sirisha Team	1/3/2025, 10:32 am		
Billings with item and Customer order	Private Dashboards	Kuruba Sirisha Team	1/3/2025, 6:58 am		

DASHBOARDS

Recent

Created by Me

Private Dashboards

All Dashboards

FOLDERS

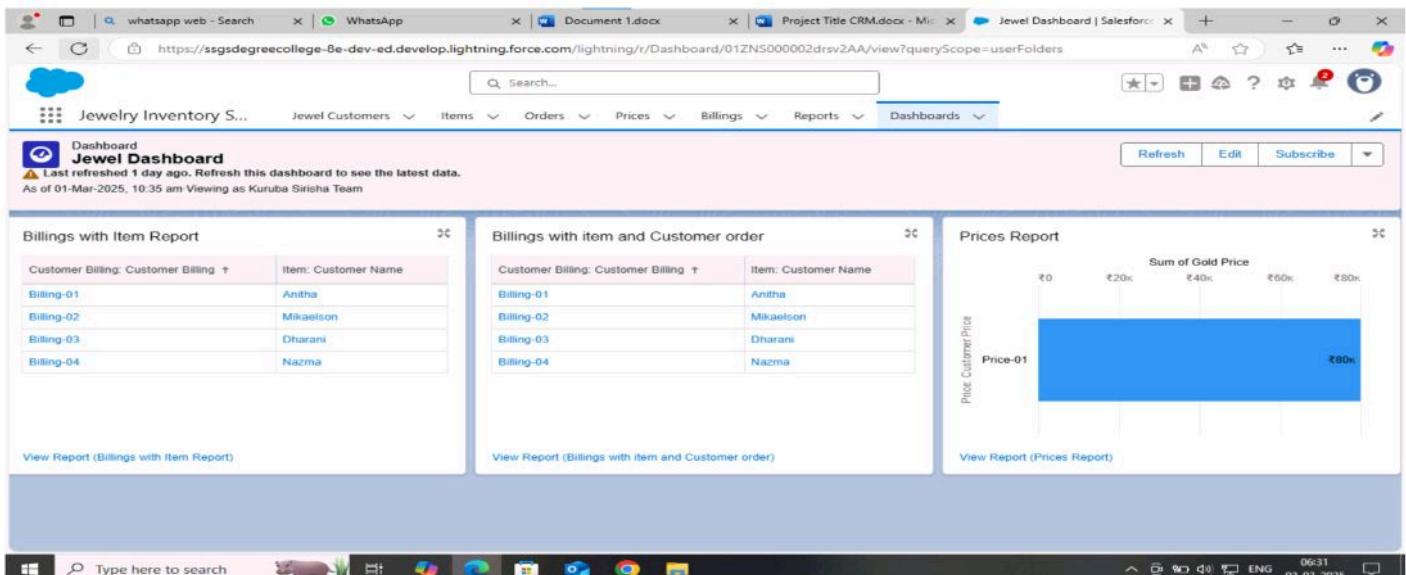
All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites



## Validation Rules: -

### Created Validation Rules under Jewel Customer & Item

**SETUP > OBJECT MANAGER**

**Jewel Customer**

Validation Rules	2 Items, Sorted by Rule Name	New		
Jewel_Customer_object	Top of Page	Please fill Required fields	✓	Kuruba Sirisha Team, 26/02/2025, 10:38 am
Postal_Code	Zip/Postal code	Must contain 6 digits	✓	Kuruba Sirisha Team, 26/02/2025, 10:27 am

whatsapp web - Search | WhatsApp | Document 1.docx | Project Title CRM.docx | Jewel Dashboard | Sales | Items | Salesforce

https://ssgsdegreecollege-8e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS000002yl4X/ValidationRules/view

Cloud icon

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

## Items

Validation Rules

1 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Item	Top of Page	Please fill Required fields	✓	Kuruba Sirisha Team, 26/02/2025, 7:43 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

New

Type here to search

https://ssgsdegreecollege-8e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS000002yl4X/ValidationRules/03dNS000002brLxYAI/view

Cloud icon

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

## Items

Items Validation Rule

Back to Items

Help for this Page

Validation Rule Detail

Rule Name	Item	Active
Error Condition Formula	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))	✓
Error Message	Please fill Required fields	Error Location
Description		Top of Page
Created By	Kuruba Sirisha Team, 26/02/2025, 10:52 am	Modified By
		Kuruba Sirisha Team, 26/02/2025, 7:43 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

Type here to search

06:39 03-03-2025

06:41 03-03-2025

Screenshot of the Salesforce Object Manager setup page for the 'Jewel Customer' object.

**Details**

**Validation Rule Detail**

**Jewel Customer Validation Rule**

**Rule Name:** Jewel\_Customer\_object

**Error Condition Formula:** OR( ISBLANK( City\_\_c ), ISBLANK( Country\_\_c ), ISBLANK( Phone\_\_c ), ISBLANK( State\_\_c ), ISBLANK( Street\_\_c ) )

**Active:** ✓

**Error Message:** Please fill Required fields

**Description:** Created By: Kuruba Sirisha Team, 26/02/2025, 10:38 am

**Created By:** Kuruba Sirisha Team, 26/02/2025, 10:38 am

**Modified By:** Kuruba Sirisha Team, 26/02/2025, 10:38 am

**Help for this Page**

**Navigation:** Setup > OBJECT MANAGER



## Schema Builder: -

We created Schema Builders for Jewel Customer, Price, Item, Customer order & Billing.

Screenshot of the Schema Builder interface showing relationships between various objects.

**Elements**

**Objects**

Select objects to display on the builder.

Select from: All Objects

Quick Find...

Selected objects:

- Account
- Activity
- Address
- Alternative Payment Method
- Appointment Category
- Appointment Invitation
- Appointment Invitee
- Appointment Topic Time Slot
- Approval Submission
- Approval Submission Detail
- Approval Work Item
- Asset

**Relationships**

The diagram illustrates the relationships between objects:

- Billing** has a relationship with **Customer Order**.
- Customer Order** has a relationship with **Price**.
- Price** has a relationship with **Jewel Customer**.
- Jewel Customer** has a relationship with **Item**.
- Item** has a relationship with **Customer Order**.
- Customer Order** has a relationship with **Recommendation**.

**Legend:**

- Lookup Relationship (Blue line)
- Master-Detail Relationship (Red line)
- Required Field (Red line with arrow)

**Help for this Page**

**Navigation:** Setup > Home > Object Manager



## Field Dependencies: -

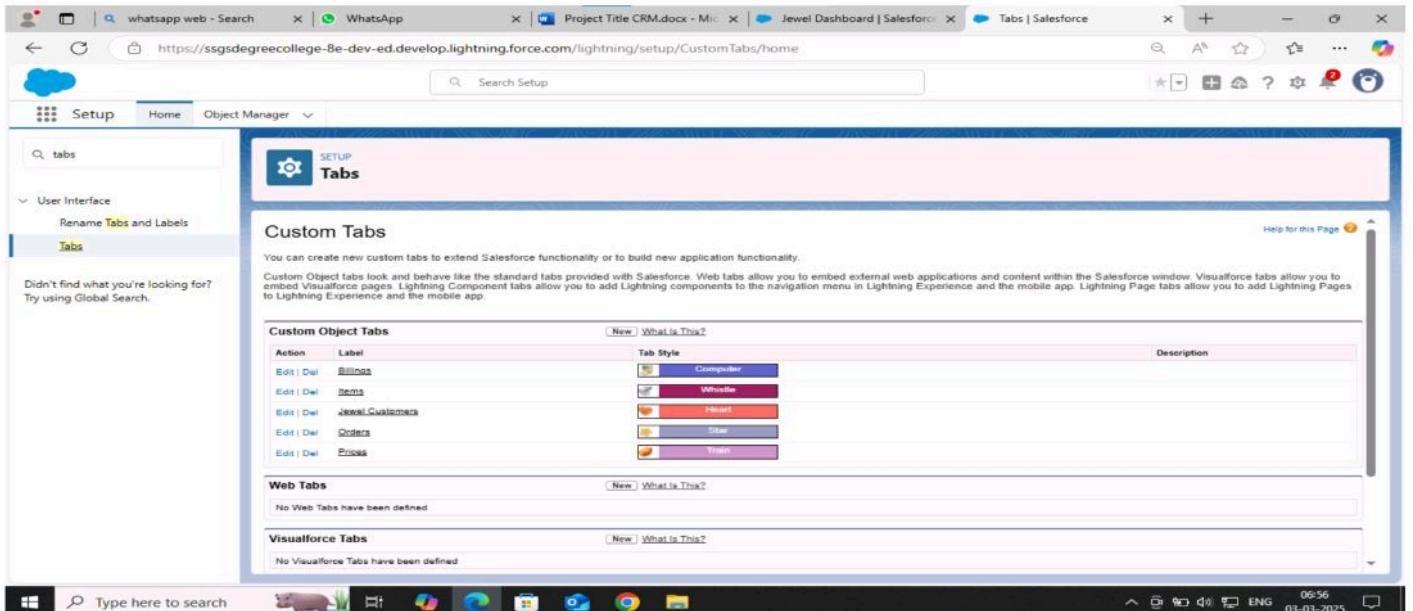
We created Field Dependencies under Item objects

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with various options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Items Field Dependencies' and shows a table with one row: Action (Edit | Del), Controlling Field (Priority), Dependent Field (Expected Days Of Return), and Modified By (Kuruba Sirisha Team, 26/02/2025, 10:02 am). There's also a 'New' button at the top of the table.

The screenshot shows the 'Edit Field Dependency' page. It has two tables: one for 'Controlling Field' (Priority) and one for 'Dependent Field' (Expected Days Of Return). Below the tables are 'Instructions' and a legend for 'Included Value' (yellow background) and 'Excluded Value' (grey background). At the bottom, there are 'Save', 'Cancel', and 'Preview' buttons.

## Tabs:-

We created Tabs for Jewel Customer, Prices, Items, Billing & Customer Order.



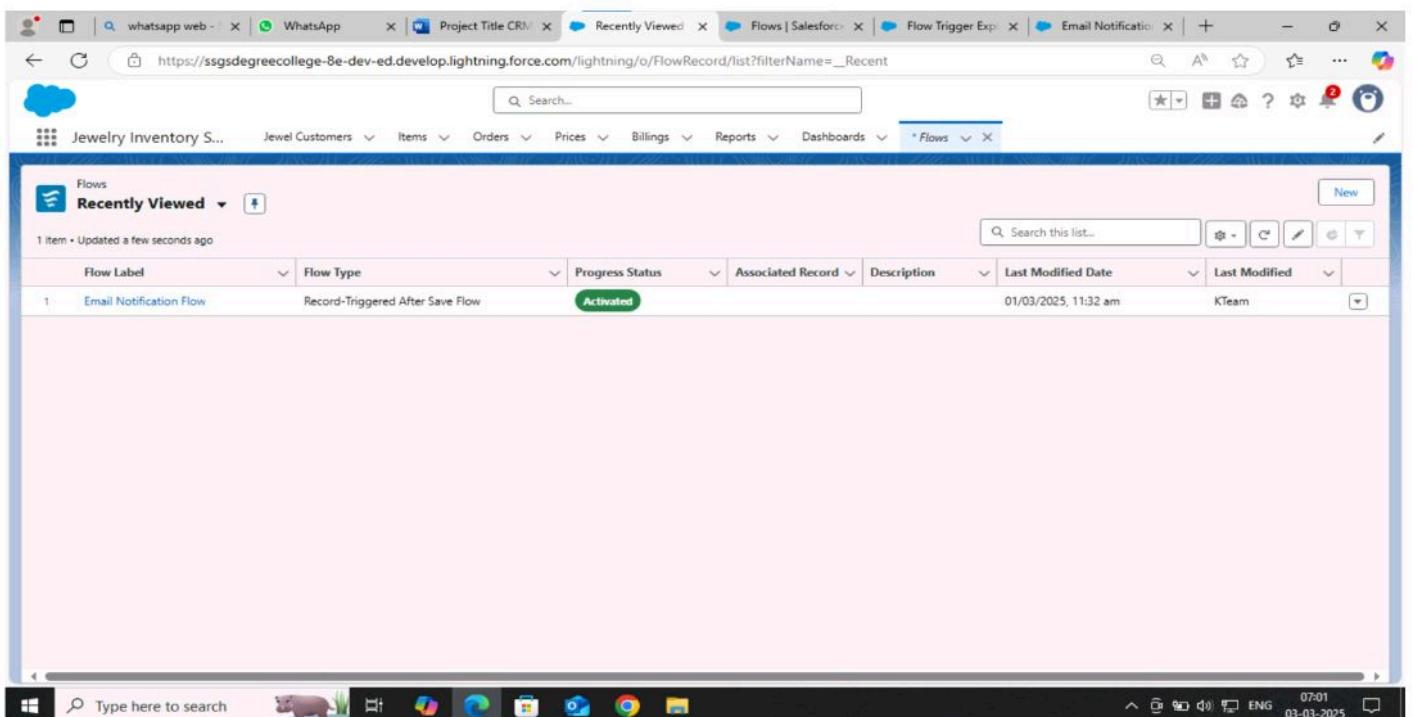
The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page open. The top navigation bar includes tabs for 'whatsapp web - Search', 'WhatsApp', 'Project Title CRM.docx - Microsoft Word', 'Jewel Dashboard | Salesforce', 'Tabs | Salesforce', and a '+' button. The main content area is titled 'Custom Tabs' and contains sections for 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. Under 'Custom Object Tabs', there is a table with columns for 'Action', 'Label', 'Tab Style', and 'Description'. The table entries include:

Action	Label	Tab Style	Description
Edit   Del	Prices	Computer	
Edit   Del	Items	Wheelie	
Edit   Del	Jewel Customer	Heart	
Edit   Del	Orders	Star	
Edit   Del	Prices	Train	

Below the table, sections for 'Web Tabs' and 'Visualforce Tabs' show that no tabs have been defined for those categories.

## Flows:-

We created flows



The screenshot shows the Salesforce Setup interface with the 'Flows' page open. The top navigation bar includes tabs for 'whatsapp web - Search', 'WhatsApp', 'Project Title CRM', 'Recently Viewed', 'Flows | Salesforce', 'Flow Trigger Expr.', 'Email Notifications', and a '+' button. The main content area is titled 'Flows' and shows a table of recently viewed flows. The table has columns for 'Flow Label', 'Flow Type', 'Progress Status', 'Associated Record', 'Description', 'Last Modified Date', and 'Last Modified'. There is one item listed:

Flow Label	Flow Type	Progress Status	Associated Record	Description	Last Modified Date	Last Modified
Email Notification Flow	Record-Triggered After Save Flow	Activated			01/03/2025, 11:32 am	KTeam

The screenshot shows the Salesforce Email Notification Flow page. At the top, there are several tabs including 'WhatsApp', 'Project Title CRM', 'Email Notification', 'Flows | Salesforce', 'Flow Trigger Exp...', and 'Email Notification'. The main content area displays the 'Email Notification Flow' record. Key details shown include:

- Type: Record—Run After Save
- Associated Record: (None)
- Progress Status: Activated
- Last Modified Date: 01/03/2025, 11:32 am
- Flow Owner: Kuruba Sirisha Team

The 'Details' tab is selected, showing the following fields:

Field	Value
Flow Label	Email Notification Flow
Description	Record-Triggered After Save Flow
Associated Record	(None)
Created By	Kuruba Sirisha Team, 01/03/2025, 11:32 am
Last Modified	Kuruba Sirisha Team, 01/03/2025, 11:32 am
Category	(None)

javascript:void(0)



## **(5) Testing & Validation:**

### **User Interface Testing:**

#### **❖ Record Types:-**

**We Created Record types in item object and labeled as “Gold” and “Silver”.**

The screenshot shows the Salesforce Object Manager page for the 'Items' object. The left sidebar lists various setup options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types (which is currently selected), Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area displays the 'Record Types' section with the following data:

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	Kuruba Sirisha Team, 26/02/2025, 2:06 pm
Silver	Silver items information	✓	Kuruba Sirisha Team, 26/02/2025, 2:09 pm

javascript:void(0)



SETUP > OBJECT MANAGER

**Items**

Record Type  
**Gold**

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

**Picklists Available for Editing**

Action	Field	Modified Date
Edit	Expected Days Of Return	26/02/2025, 2:06 pm
Edit	Item	26/02/2025, 2:06 pm
Edit	Priority	26/02/2025, 2:06 pm

Help for this Page

SETUP > OBJECT MANAGER

**Items**

Record Type  
**Silver**

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

**Picklists Available for Editing**

Action	Field	Modified Date
Edit	Expected Days Of Return	26/02/2025, 2:09 pm
Edit	Item	26/02/2025, 2:09 pm
Edit	Priority	26/02/2025, 2:09 pm

Help for this Page

## ★ Permission Sets: -

We created permission sets and labeled as “Per to Worker” and selected object permissions for “Read, Edit, Create”.

Permission Set Overview

- Description:
- License:
- Session Activation Required:
- Permission Set Groups Added To: 0

API Name: Per\_to\_Worker  
Namespace Prefix: Kunuba\_Sirisha\_Team  
Created By: Kunuba Sirisha Team, 26/02/2025, 5:50 pm  
Last Modified By: Kunuba Sirisha Team, 26/02/2025, 10:17 am

**Apps**

- Assigned Apps: Settings that specify which apps are visible in the app menu
- Assigned Connected Apps: Settings that specify which connected apps are visible in the app menu
- Object Settings: Permissions to access objects and fields, and settings such as tab availability
- App Permissions: Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access: Permissions to execute Apex classes
- Visualforce Page Access: Permissions to execute Visualforce pages

Permission Set Overview > Object Settings > Items

Items	Save	Cancel										
Tab Settings	<table border="1"> <tr> <td>Available</td> <td>Visible</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> </table>		Available	Visible	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
Available	Visible											
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>											
Items: Record Type Assignments	<table border="1"> <thead> <tr> <th>Record Types</th> <th>Assigned Record Types</th> </tr> </thead> <tbody> <tr> <td>Gold</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Silver</td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table>		Record Types	Assigned Record Types	Gold	<input checked="" type="checkbox"/>	Silver	<input checked="" type="checkbox"/>				
Record Types	Assigned Record Types											
Gold	<input checked="" type="checkbox"/>											
Silver	<input checked="" type="checkbox"/>											
Object Permissions	<table border="1"> <thead> <tr> <th>Permission Name</th> <th>Enabled</th> </tr> </thead> <tbody> <tr> <td>Read</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Create</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Edit</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Delete</td> <td><input type="checkbox"/></td> </tr> </tbody> </table>		Permission Name	Enabled	Read	<input checked="" type="checkbox"/>	Create	<input checked="" type="checkbox"/>	Edit	<input checked="" type="checkbox"/>	Delete	<input type="checkbox"/>
Permission Name	Enabled											
Read	<input checked="" type="checkbox"/>											
Create	<input checked="" type="checkbox"/>											
Edit	<input checked="" type="checkbox"/>											
Delete	<input type="checkbox"/>											

## ★ Profiles: -

- We created 2 Profiles and given name as
- Gold Smith Profile

## ● Worker Profile

The screenshot shows two instances of the Salesforce Setup interface, both displaying the 'Profiles' page for editing a 'Gold Smith' profile.

**Profile Edit (Top Window):**

Name	User License	Description	Custom Profile
Gold Smith	Salesforce		<input checked="" type="checkbox"/>

**Custom App Settings:**

Category	Visible	Default	Category	Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	My Service Journey (standard__MSJApp)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Automation (standard__FlowsApp)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input checked="" type="checkbox"/>	<input type="radio"/>
Business Rules Engine (standard__ExpressionSetConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>			

**Session Settings:**

- Session Times Out After: 2 hours of inactivity
- Session Security Level Required at Login: None

**Password Policies:**

- User passwords expire in: 90 days
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 10
- Lockout effective period: 15 minutes
- Obfuscate secret answer for password resets:
- Require a minimum 1 day password lifetime:
- Don't immediately expire links in forgot password emails:

**Buttons at the bottom:**

- Save
- Save & New
- Cancel

**Profile Edit**

Name: worker profile  
User License: Salesforce Platform  
Description:

**Custom App Settings**

App	Visible	Default	Visible	Default	
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard_Platform)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard_Work)	<input type="checkbox"/>	<input checked="" type="radio"/>
Jewelry Inventory System (Jewelry_Inventory_System)	<input type="checkbox"/>	<input checked="" type="radio"/>			

**Service Provider Access**

**Tab Settings**

Overwrite users' personal tab customizations:

Tab	Home	Default On	Inventory Operations	Inventory Reservations	Invoices
Accounts	<input checked="" type="checkbox"/>	Default On	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
All sites	<input checked="" type="checkbox"/>	Tab Hidden	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Custom Object Permissions**

Object	Basic Access	Create	Edit	Delete	Data Administration
Billings	<input checked="" type="checkbox"/>				
Billings with Item and Customer orders	<input checked="" type="checkbox"/>				
Orders	<input checked="" type="checkbox"/>				

Object	Basic Access	Create	Edit	Delete	Data Administration
Items	<input checked="" type="checkbox"/>				
Jewel Customers	<input type="checkbox"/>				
Prices	<input checked="" type="checkbox"/>				
prices	<input checked="" type="checkbox"/>				

**Session Settings**

Session Times Out After: 2 hours of inactivity  
Session Security Level Required at Login: None

**Password Policies**

- User passwords expire in: 90 days
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempt: 10
- Lockout effective period: 15 minutes

## ★ Validation Rules: -

https://ssgsdegreecollege-8e-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01INS000002yl4X/ValidationRules/view

Cloud icon, Search Setup, Home, Object Manager

SETUP > OBJECT MANAGER  
Items

Validation Rules  
1 items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Item	Top of Page	Please fill Required fields	✓	Kuruba Sirisha Team, 26/02/2025, 7:43 pm

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

https://ssgsdegreecollege-8e-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01INS000002yl4X/ValidationRules/03dNS000002brLx.../edit

Cloud icon, Search Setup, Home, Object Manager

SETUP > OBJECT MANAGER  
Items

Items Validation Rule  
Back to Items

Validation Rule Detail

Rule Name	Item	Active
Error Condition Formula	<code>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) )</code>	✓
Error Message	Please fill Required fields	Error Location
Description		Top of Page
Created By	Kuruba Sirisha Team, 26/02/2025, 10:52 am	Modified By
		Kuruba Sirisha Team, 26/02/2025, 7:43 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

Screenshot of the Salesforce Setup page showing the 'Items Validation Rule' configuration.

**Validation Rule Edit**

- Validation Rule Name:** Item
- Active:** Checked
- Description:** (Empty)
- Error Condition Formula:**

```
OR( ISBLANK(Amount__c) , ISBLANK(Customer_Name__c) , ISBLANK(Gold_Price__c) , ISBLANK(KDM__c) , ISBLANK(Ornament__c) , ISBLANK(Percentage__c) , ISBLANK(Making_Charge__c) , ISBLANK(Price__c) , ISBLANK(Stone_Weight__c) , ISBLANK(Silver_Price__c) , ISBLANK(Stone_Other_Price__c) , ISBLANK(Stone_Weight__l) , ISBLANK(Weight__o) )
```
- Functions:**
  - ABS
  - ACOS
  - ADDMONTHS
  - AND
  - ASCII
  - ASIN

The formula is designed to trigger an error if any of the specified fields are blank.

## ★ Flows: -

Screenshot of the Salesforce Flow Builder interface showing a 'Record-Triggered Flow' for the 'Billing' object.

**Flow Details:**

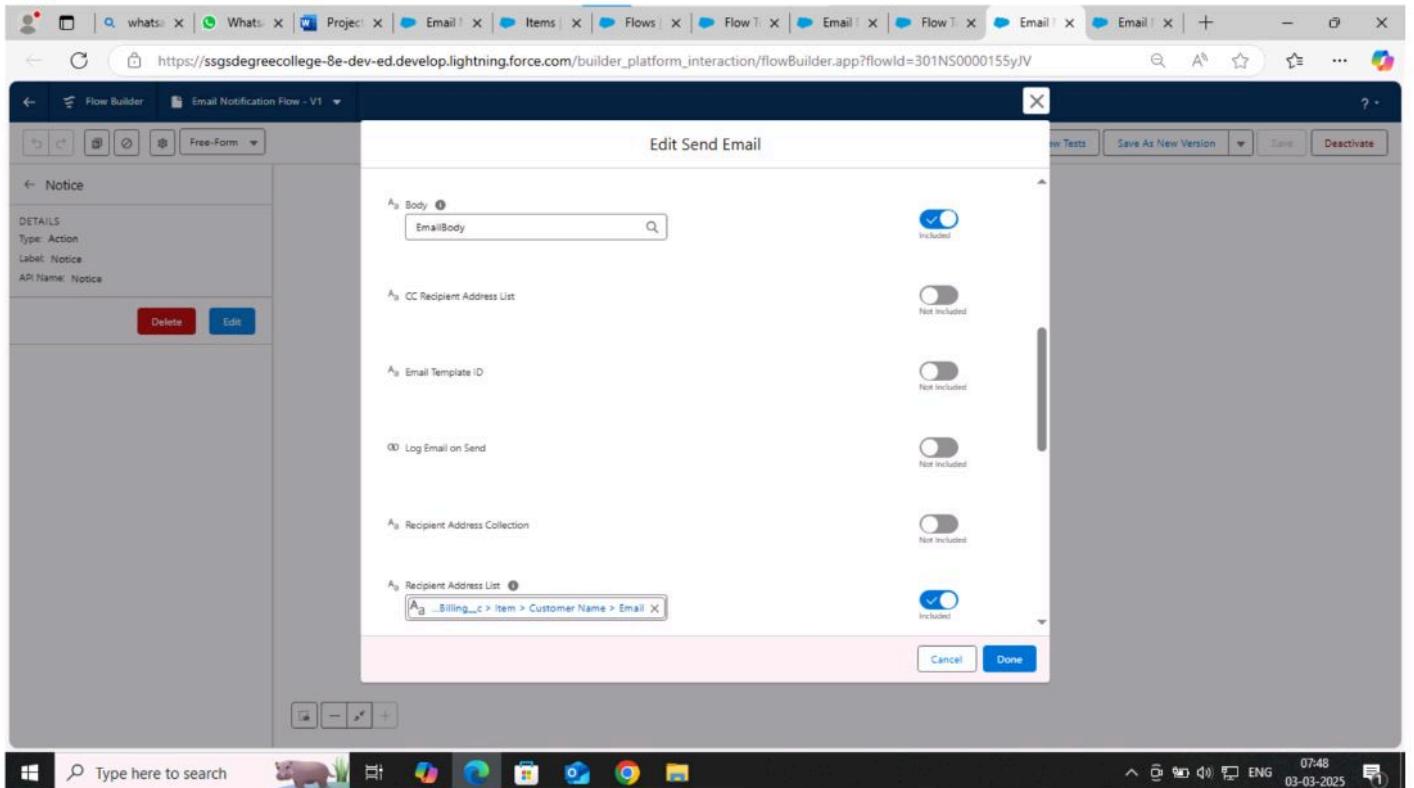
- Object:** Billing
- Trigger:** A record is created
- Optimize for:** Actions and Related Records
- Run Immediately:** Checked

**Action:** Notice

The flow starts with a 'Record-Triggered Flow' trigger and ends with an 'Action Notice' action.

**Toolbox Elements:**

- Interaction (3): Action, Subflow, Custom Error
- Logic (6): Assignment, Decision, Loop, Transform
- Data (4): Create Records, Update Records, Get Records, Delete Records



## ★ User Adoption: -

We created some jewel customers, items, billings, prices, customer orders in **Jewelry Inventory System.**

User Detail	
Name	Niklaus Mikaelson
Alias	nmika
Email	<a href="mailto:muglidharani@gmail.com">muglidharani@gmail.com</a> [Verify]
Username	sirisha@123gmail.com
Nickname	User17405574621755108520
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Role	Gold Smith
User License	Salesforce
Profile	Gold Smith
Active	✓
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	<a href="#">View</a>

whatsapp web - Search X WhatsApp X Users | Salesforce Project Title CRM.docx - Microsoft Word X

https://ssgsdegreecollege-8e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005NS00000Ha66j%3Fnoredirect%3D1%2...

Cloud Search Setup

Setup Home Object Manager

Q user adp No matching items found

Didn't find what you're looking for?  
Try using Global Search.

User Kuruba Sirisha Team

Permission Set Assignments [ ] | Permission Set Assignments: Activation Required [ ] | Permission Set Group Assignments [ ] | Permission Set License Assignments [ ] | Personal Groups [ ] | Public Group Membership [ ] | Queue Membership [ ] | Team [ ] | Managers in the Role Hierarchy [ ] | OAuth Apps [ ] | Third-Party Account Links [ ] | Installed Mobile Apps [ ] | Authentication Settings for External Systems [ ] | Login History [10+] | User Provisioning Accounts [ ]

User Detail

		Role
Name	Kuruba Sirisha Team	User License
Alias	KTeam	Profile
Email	mugithidharani@gmail.com [Verified]	System Administrator
Username	jewel@kurubasirishateam.com	Active
Nickname	jewel [ ]	Marketing User
Title		Offline User
Company	SSGS degree college	Knowledge User
Department		Flow User
Division		Service Cloud User
Address	Koya nagar,near kasapuram road Guntakal 515801 AP INDIA	Site.com Contributor User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User
Locale	English (India)	WDC User

User Profile Help for this Page

Type here to search

09:50 03-03-2025

The screenshot shows a browser window with several tabs open. The active tab is 'Permission Sets | Salesforce'. The URL in the address bar is <https://ssgsdegreecollege-8e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPNSNS00006WeW&f=1>. The page title is 'Permission Sets'.

The main content area displays the 'Experience Profile Manager' permission set. It includes a 'Permission Set Overview' table with the following data:

Description	API Name
License: Salesforce	Experience_Profile_Manager
Session Activation Required: <input checked="" type="checkbox"/>	Created By: Kunuba Sirisha Team, 20/02/2025, 10:28 am
Permission Set Groups Added To: 0	Last Modified By: Kunuba Sirisha Team, 28/02/2025, 10:17 am

Below the overview, there is a section titled 'Apps' which lists various app settings:

- Assigned Apps**: Settings that specify which apps are visible in the app menu.
- Assigned Connected Apps**: Settings that specify which connected apps are visible in the app menu.
- Object Settings**: Permissions to access objects and fields, and settings such as tab availability.
- App Permissions**: Permissions to perform app-specific actions, such as "Manage Call Centers".
- Apex Class Access**: Permissions to execute Apex classes.
- Visualforce Page Access**: Permissions to execute Visualforce pages.

The status bar at the bottom shows the URL <https://ssgsdegreecollege-8e-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/OPNSNS00006WeW?isdtpp=1>, the date '03-03-2025', and the time '09:52'.

## (6) Conclusion:-

CRM is a tool that allows businesses to manage relationships with their customers effectively. Customer Relationship management is a business strategy that enables a business organization to maximize revenue, customer satisfaction, and profitability through strategic mobilization, organization, and management of customer's interests and desires. BWM has traversed

numerous business challenges that made it establish a CRM that will foster customer relationship as a baseline for market strengthening and diversification. BMW has diversified its market in various global markets through the initiation of the CRM systems. The system has significantly contributed to the company's financial, operational, managerial and development initiatives with a robust customer relationship that has fostered great sales of its product. Mercedes Benz operates a similar customer relationship management system just BMW and due to market power, the company has its customer roots to various market bases. Mercedes has majored in customer-dealership business relationships. This has provided the company with strategic mechanization of customer retention, satisfaction and purchase behavior enhancing the company's profitability through an increased purchase command. The two companies are among the leading CRM implementers in automotive.



**CRM system is critical for jewelry businesses, allowing them to effectively manage customer relationships by centralizing data, enabling personalized interactions, optimizing sales processes, and gaining valuable insights into customer behavior, ultimately leading to increased sales, improved customer loyalty, and a more streamlined business operation through tailored marketing strategies and exceptional customer service.**

A CRM (Customer Relationship Management) system for jewelers is essential for managing customer relationships, enhancing sales, and improving overall business efficiency.



Jewelry businesses face a multitude of challenges, from fierce competition to changing consumer preferences and limited budgets for marketing and advertising. It can be a tough market to navigate, but the good news is that implementing a customer relationship management (CRM) system can help overcome many of these challenges.

One of the biggest challenges facing jewelry businesses is the need to stay relevant and top of mind with customers. With so many options available, consumers are easily distracted and can quickly forget about your brand. A CRM system can help you stay top of mind by enabling you to communicate with

**customers on a regular basis and provide personalized recommendations based on their preferences.**

**Another challenge is managing inventory and ensuring that you have the right products available at the right time. A CRM system can help you keep track of inventory levels and alert you when products are running low or need to be restocked. This can help you avoid lost sales due to out-of-stock items and ensure that you always have a variety of products available to meet customer demand.**

**Finally, jewelry businesses face the challenge of attracting new customers and retaining existing ones. A CRM system can help you identify customer segments and target them with personalized marketing messages that resonate with their specific interests and preferences.**

