

NAAN MUDHALVAN SKILL DEVELOPMENT PROGRAM

SB8067-SALESFORCE DEVELOPER

A SKILL TRAINING REPORT

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**BACHELOR OF ENGINEERING
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COMPUTER SCIENCE AND ENGINEERING**

**PSN INSTITUTE OF TECHNOLOGY & SCIENCE,
TIRUNELVELI**

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CRM APPLICATION FOR JEWEL MANAGEMENT

Project report

CRM APPLICATION FOR JEWEL MANAGEMENT

Project Definition

The Jewel Inventory System is a comprehensive software solution designed to streamline and manage the inventory and sales processes of a jewellery store or a jewellery manufacturer. The system aims to provide an efficient and user-friendly solution to track and control the inventory of various jewellery items, maintain accurate records, and facilitate seamless sales transactions. It also enables real-time monitoring of stock levels and generates detailed reports for better decision-making. The system helps reduce manual errors, save time, and enhance overall operational efficiency. Additionally, it ensures secure data handling and supports smooth communication between customers, suppliers, and management.

Abstract

The **CRM Application for Jewel Management** is a Salesforce-based project designed to automate and streamline the operations of a jewellery business. This application efficiently manages the inventory, sales, and customer data of jewellery stores and manufacturers within a single, cloud-based platform. It helps maintain detailed records of jewellery items such as gold, silver, diamond, and gemstone pieces, along with their weight, purity, and price. The system also simplifies day-to-day business tasks like purchase order tracking, supplier management, and sales processing, ensuring all business activities are well-organized and easily accessible.

Built using Salesforce features such as **Custom Objects, Record-Triggered Flows,**

Validation Rules, and Reports & Dashboards, the system ensures accurate tracking of jewellery items, seamless sales transactions, and effective customer relationship management. It enables users to monitor stock levels in real time, generate automated invoices, and analyze sales performance through interactive dashboards. Moreover, the use of **Automation and Approval Processes** helps reduce manual workload, while maintaining consistency and accuracy in operations.

By leveraging Salesforce automation and data management capabilities, the project enhances business productivity, minimizes manual effort, and improves decision-making. It supports role-based access, ensuring data security and controlled access for different users such as administrators, sales staff, and managers. Overall, the system provides a secure, scalable, and user-friendly CRM solution tailored to meet the specific operational needs of the jewellery industry, empowering businesses to deliver better customer service and achieve sustainable growth.

Objective of the Project

- To automate jewellery business operations using **Salesforce CRM**.
- To manage **inventory and track stock levels** in real time.
- To streamline **sales transactions and automate billing** processes.

- To maintain accurate customer records and enhance customer relationships.
- To manage supplier details and monitor purchase orders efficiently.
- To ensure **data accuracy, security, and controlled** user access.
- To generate analytical reports and dashboards for performance monitoring.
- To provide a **user-friendly interface** for easy system navigation.
- To create a scalable and **flexible solution** for future business growth.

Software requirements

Platform

- Salesforce CRM (Cloud-Based Platform)

Operating System:

- Windows 10 or above
- macOS
- Web Browser Access

Web Browser

- Google Chrome
- Mozilla Firefox, or Microsoft Edge (Latest Version)

Database

- Salesforce Standard Database (Objects, Fields, and Relationships)

Tools Used

- Salesforce Flow Builder
- Process Builder
- Validation Rules, Reports & Dashboards
- Salesforce Developer Console

Programming Language:

- Apex (for custom logic) and SOQL (for queries)

User Interface

- Lightning App Builder and Salesforce Lightning Pages

Modules in the system :



Creating The Number
Field In Item Object

Creating Picklist Field In
Item Object

Creating Currency Field
In Price Object

Creating Formula
Field(Cross Object) In
Item Object

Creating Remaining
Fields In Objects

Schema Builder

Creating The Field
Dependencies

Creating The Validation
Rule

• Users

Create User

Create User

• Page Layouts

To Create A Gold Page
Layout

To Create A Silver Page
Layout

• Record Types

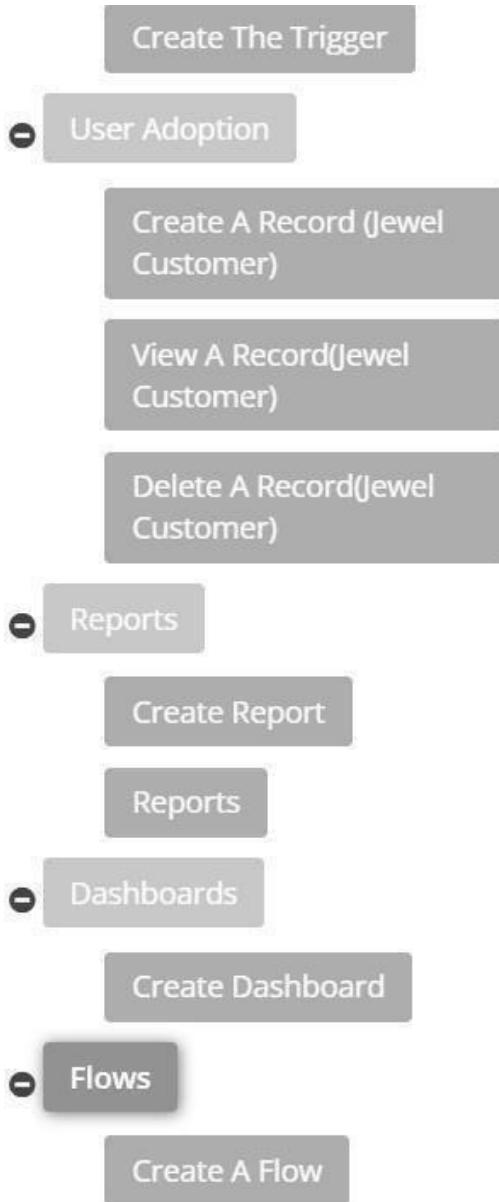
To Create A Record Type

• Permission Sets

Creating Permission Set

• Trigger

Create A Trigger Handler
Class



User Management :

Manages different user roles like Admin, Gold Smith, and Worker JW.

Customer Management :

Stores customer details, purchase history, and preferences.

Product Management :

Handles jewelry item details such as Gold, Silver, Diamond, and related properties.

Price Book Management :

Maintains product pricing for various categories and updates discounts.

Order Management :

Records customer orders, payments, and delivery status.

Reports & Dashboards :

Displays visual insights into sales, top customers, and performance.

Automation & Workflows :

Handles approval processes, reminders, and email notifications.

Implementation of the model

1. Create Jewel Customer Object

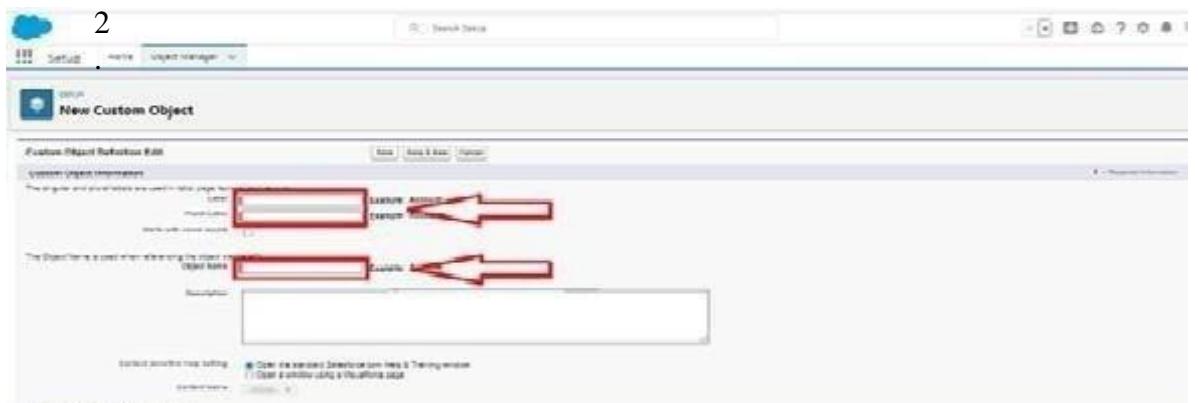
The purpose of creating a Jewel Customer custom object is to store and manage information about Customer.

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.



1. Enter the label name : Jewel Customer
 - . Plural label name : Jewel Customers



3. Enter Record Name Label and Format
 - . Record Name >> Customer name
 - . Data Type >> Text

2. Click on Allow reports.

3. Allow search and click Save.

2.Create Item Object

The purpose of creating a Item object is to manage the inventory of gold and silver items.
To create an object:

1. From the setup page>>Click on Object Manager >> Click on Create >> Click on Custom Object.
 2. Enter the label name >> Item
 3. Plural label name>> Items
 4. Enter Record Name Label and Format
 - Record Name >> Item Id
 - DStaiasrlptTianaeyypgFNo>ouNr>mmba0A}uetr>t>>>It1eumm-{b0er
-
2. Click on Allow reports.
 3. Allow search >> Save.

3.Creating a Custom Tab

To create a Tab:(Customer)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)

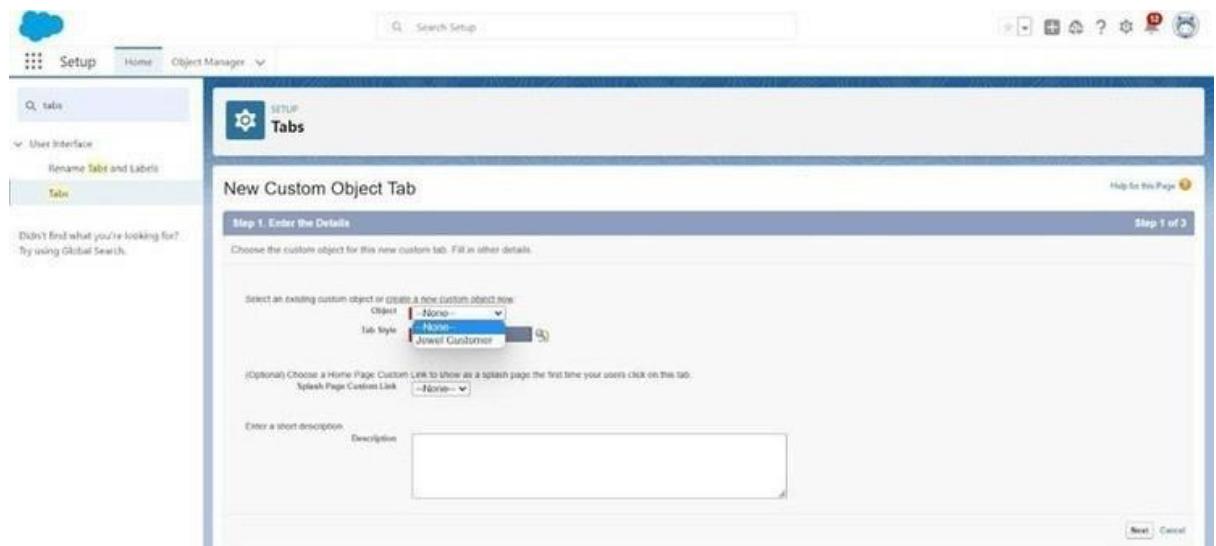
Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external content, such as Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation bar. You can also allow users to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs	New	What Is This?
No Custom Object Tabs have been defined		
Web Tabs	New	What Is This?
No Web Tabs have been defined		

2. Select Object(Jewel Customer) >> Select any tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) keep it as default >> Save.



4. Create a Lightning App

To create a lightning app page:

1. Go to setup page >> search “app manager” in quick find >> select “app manager” >>
2. click on New lightning App.

App Name	Developer Name	Description	Last Modified	Type	Actions
Ad Tab	AdTab	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	<input checked="" type="checkbox"/>
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	<input checked="" type="checkbox"/>
App Launcher	AppLauncher	App Launcher tabs	04/12/2022, 10:13 am	Classic	<input checked="" type="checkbox"/>
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry	04/12/2022, 10:13 am	Lightning	<input checked="" type="checkbox"/>
Chatter Desktop	Chatter/Desktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected	28/12/2022, 4:04 pm	Connected (Managed)	<input checked="" type="checkbox"/>
Chatter Mobile for BlackBerry	Chatter/For BlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view news	28/12/2022, 4:05 pm	Connected (Managed)	<input checked="" type="checkbox"/>
College Management System	hassan	demo app	08/12/2022, 4:19 pm	Lightning	<input checked="" type="checkbox"/>
Community	Community	Salesforce CRM Communities	04/12/2022, 10:13 am	Classic	<input checked="" type="checkbox"/>
Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic	<input checked="" type="checkbox"/>
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage replicas	04/12/2022, 10:13 am	Lightning	<input checked="" type="checkbox"/>

3. Fill the app name in app details and branding as follow

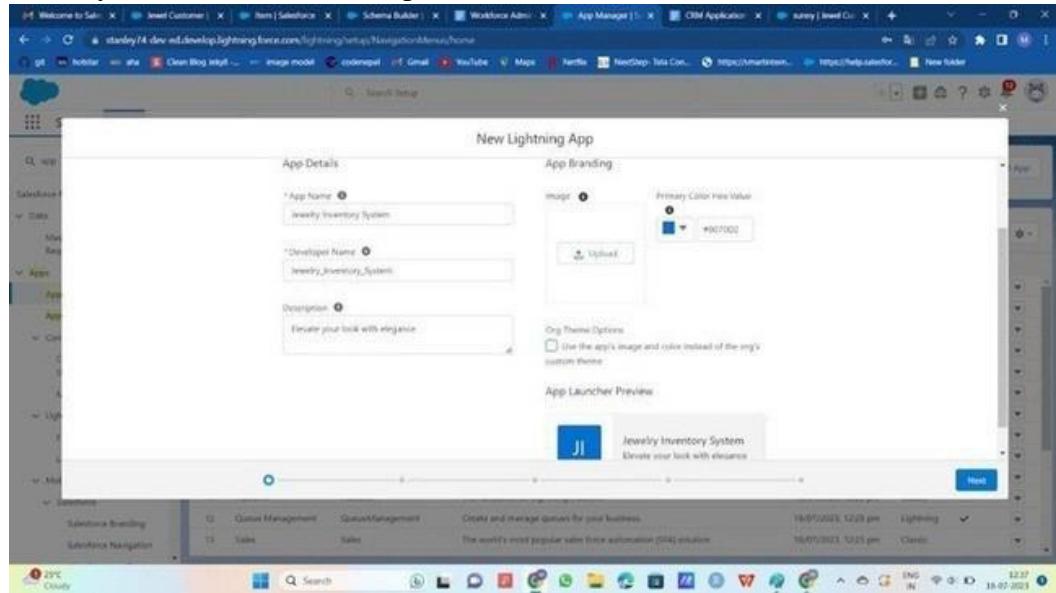
App Name : Jewellery Inventory System.

Developer Name : This will auto populated

Description : Elevate your look with elegance

Image : optional (if you want to give any image you can otherwise not mandatory)

Primary colour hex value : keep this default.

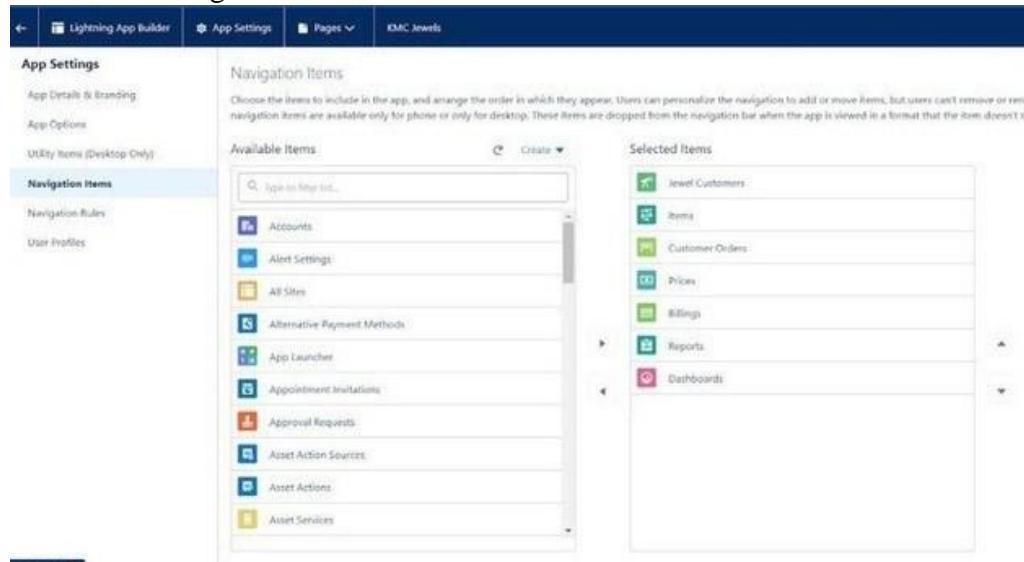


4. Then click Next >> (App option page) Set Navigation Style as Console Navigation >> Next.



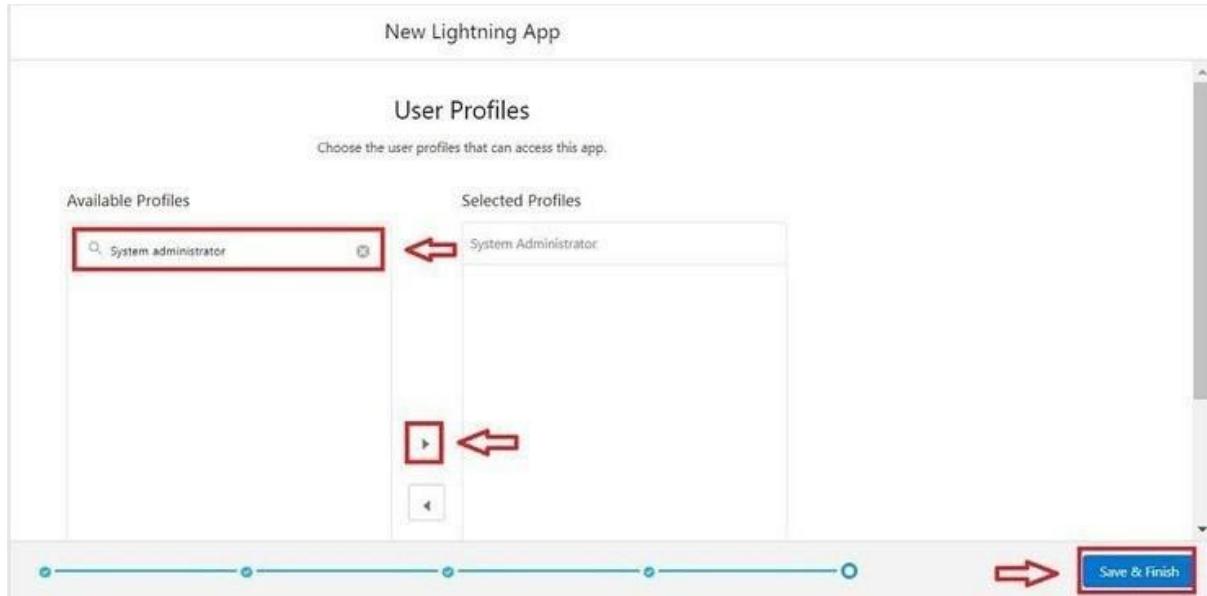
(Utility Items) keep it as default >> Next.

5. To Add Navigation Items:



Search for the item in the (JewelCustomer, Item, CustomerOrder, Price, Billing, Reports, Dashboard) from the search bar and move it using the arrow button ? Next? Next.

6. To Add User Profiles:



Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

5. Creating Lookup Relationship

To Create a relationship between Jewel Customer & Customer Order Objects.

1. Go to the setup page >> click on object manager >> type object name(Customer Order) in the quick find bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select “Lookup relationship” as data type and click Next.
4. Select the related object “Jewel Customer ”.
5. Give Field Label as “Customer” and click Next.
6. Next >> Next >> Save.

6. Gold Smith Profile

To create a new profile:

1. Go to setup >> type profiles in quick find box >>click on profiles ? clone the desired profile (System Administrator) >> enter profile name (Gold Smith) >> Save.

Scroll down and Click on Save.

7. Worker Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Salesforce Platform User) >> enter profile name () >> Save.
- 2 While still on the profile page, then click Edit.
Scroll down to Custom Object Permissions and Give access permissions for Items, Price and Customer Order objects.
4. Scroll down and Click on Save.

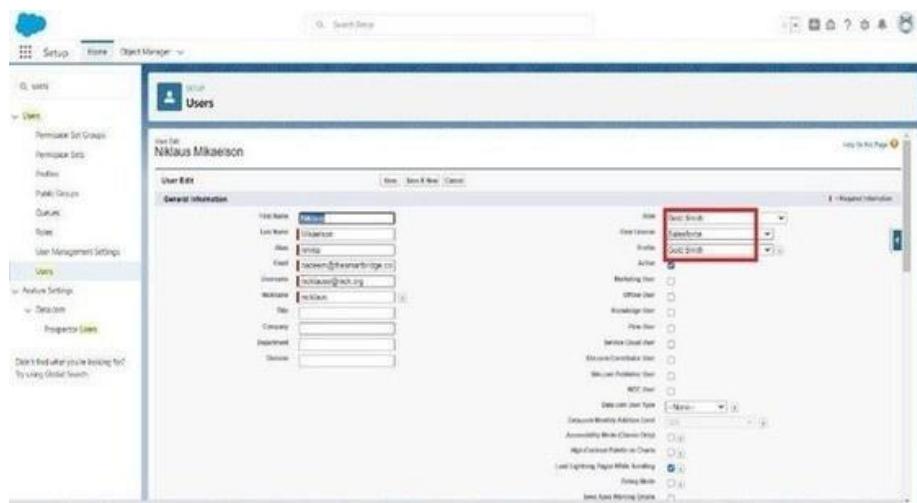
8. Creating Gold Smith Role

1. From setup ,Go to quick find >> Search for Roles >> click on set up roles.

- 2.Click on Expand All and click on add role under whom this role works.
- 3.Give Label as “Gold Smith” and Role name gets auto populated. Check to whom this role (Gold Smith) reports. Then click on Save.

9. Create User

- 1 Go to setup >> type users in quick find box >> select users >> click New user.
- . Fill in the fields
- 2
 1. First Name: Niklaus
 2. Last Name: Mikaelson
 3. Alias 4.: Give a Alias Name
 - Email id 5.: Give your Personal Email id
 - Username 6.: Username should be in this form: text@text.text
 - Nick Name 7.: Give a Nickname
 - Role 8. User: Gold Smith
 - licence 9. : Salesforce
 - Profiles : Gold Smith



10. Save

Create User

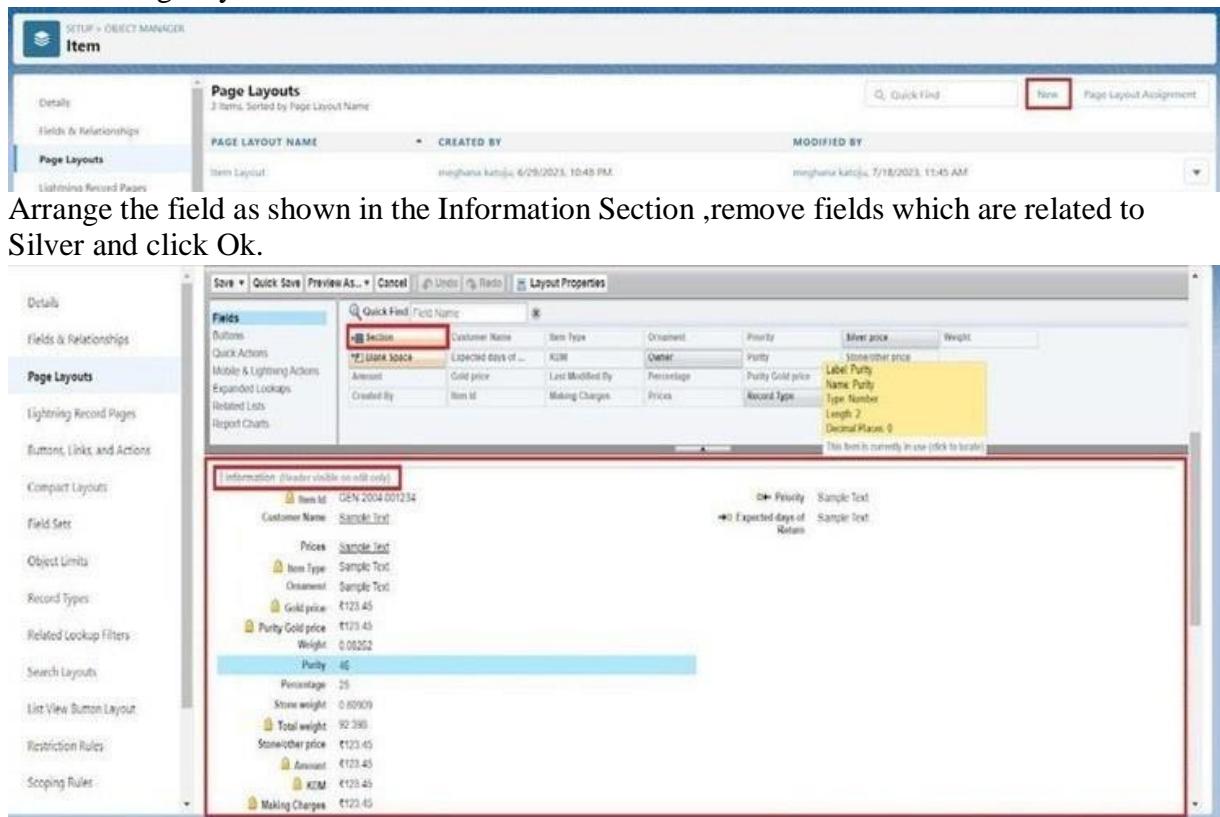
- 1 Go to setup >> type users in quick find box >> select users >> click New user.
- . Fill in the fields
- 2
 - First Name : Kol
 - Last Name : Mikaelson
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: text@text.text
 - Nick Name : Give a Nickname
 - Role : Worker
 - User licence : Salesforce Platform
 - Profiles : Worker
3. Save.

Note:

Create two more users as mentioned in activity 2 using the same profile.

10. To Create a Gold Page layout

1. Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.
2. Click on Page layout >> Click on New.



- 4 Click Save.

- Make sure your page layout looks like the picture above. Like this create same for silver page layout.

11. To create a Record Type

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
2. Click on the Record Types >> click New.



3. Select Existing Record as "Master", Record type Label as "Gold", Description as "Gold items information".

- Uncheck for “Make Available”.

Profile Name	Record Types Currently Available	Make Available	Make Default
Analytics Cloud Integration User		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter External User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter Free User		<input type="checkbox"/>	<input type="checkbox"/>

- Scroll down and check for the Gold Smith,Worker JW & System Administrator profile and click on Next.

Customer Portal Manager (Standard)	Gold (Default), Silver
External App Logon User	<input type="checkbox"/>
External Identity User	<input type="checkbox"/>
Force.com - App Subscription User	<input type="checkbox"/>
Force.com - Free User	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>
Gold Smith	<input checked="" type="checkbox"/>
High Volume Customer Portal	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
HR	<input type="checkbox"/>
HR Recruiter	<input type="checkbox"/>
Identity User	<input type="checkbox"/>
J Worker1	<input type="checkbox"/>
J Worker2	<input type="checkbox"/>
J Worker3	<input type="checkbox"/>
Manager	<input type="checkbox"/>
Marketing User	<input type="checkbox"/>
Minimum Access - Salesforce	<input type="checkbox"/>
Platform Admin for the current User	<input type="checkbox"/>

- Select “Apply a different layout for each profile”, and change page layout to “Page Layout for Gold“for Gold Smith,Worker and System Administrator ? save & new.

Activity 2: Create another Record Type with name “Silver” following the steps from Activity1.

Note: Use page layout for Silver.

11. Creating permission set

- Go to setup >> type “permission sets” in quick search >> select permission sets >> New.
- Enter the label name as “Per to Worker”, API will be auto populated ? save.

Label	API Name
Per to Worker	Per_to_Worker

3. Under Apps Select object settings.

The screenshot shows the 'Permission Sets' setup page. At the top, there's a breadcrumb navigation: 'Permission Set Overview > Directories > Beta'. Below it, a table lists 'Object Permissions' for three record types: Lead, Case, and Job. The 'Lead' row has a red box around it. The 'Case' and 'Job' rows also have red boxes around them. The 'Object Name' column lists 'Lead', 'Case', and 'Job'. The 'Assigned Record Types' column shows checkboxes for 'Lead', 'Case', and 'Job' for each object.

1. Click on Save.
2. After saving the permission click on the Manage assignment
3. Now click on the Add Assignment.

The first screenshot shows the 'Select Users to Assign' screen. It lists users under the 'All Users' filter. A red box highlights the 'Role' column for the user 'Mani deepak', which is set to 'Worker'. The second screenshot shows the 'Select an Expiration Option For Assigned Users' screen. It displays a table of 'Selected Users' with a red box around the table header. The table includes columns for 'Full Name', 'Role', 'Profile', 'Active', 'User License', and 'Expires On'. The user 'Mani deepak' is listed with a red box around the entire row.

12. Create a Trigger Handler class

Triggerhandler:

A trigger handler is a design pattern that organises trigger logic into separate classes. This helps in keeping code organised, reusable, and easier to maintain. The trigger handler class contains methods that handle the specific logic for different trigger events, improving code structure and readability. This approach is particularly useful for complex triggers or projects with multiple triggers, as it promotes modular coding practices and reduces the chances of code duplication. **CODE:** 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;
    }
}
```

13. Create a Record (Jewel Customer)

- 1 Click on App Launcher on the left side of the screen.
- 2 Search Jewelry Inventory System & click on it.



- 3 Click on Drop Down and Click on the Jewel Customer tab.

- Click New.



- Fill the Details and click on Save.

14. Create Report

- Go to the app >> click on the reports tab
- Click New Report.

2

REPORTS	Report Name	Folder	Created By	Created On	Subscribed
Recent	New Report Billing & order	Private Reports	meghana.katju	7/19/2023, 4:34 AM	
Created by Me	New Items with Bill	Private Reports	meghana.katju	7/19/2023, 4:30 AM	
Private Reports	New Prices Report	Private Reports	meghana.katju	7/19/2023, 4:27 AM	
Public Reports	Days on Market	DreamHouse Reports	meghana.katju	5/31/2022, 11:25 PM	
All Reports	New Billings with It	Private Reports	meghana.katju	7/12/2023, 8:45 PM	
FOLDERS	New Billings with ne	Private Reports	meghana.katju	7/10/2023, 8:48 PM	
All Folders	Report	Private Reports	meghana.katju	7/12/2023, 12:03 AM	
Created by Me	New Opportunities r	Private Reports	meghana.katju	7/13/2023, 12:01 AM	
Shared with Me	New Accounts Repor	Private Reports	meghana.katju	7/11/2023, 11:49 PM	
FAVORITES	New Orders Report	Private Reports	meghana.katju	7/11/2023, 11:39 PM	
All Favorites	New Billings with Price	Private Reports	meghana.katju	6/20/2023, 11:19 PM	
	New Employees Report	Private Reports	meghana.katju	6/20/2023, 11:08 PM	

- Select report type from category or from report type panel or from search panel ? click on start report.

Category	Report Type Name	Category
Recently Used	Price Books with Products	Standard
All	Items with Prices	Standard
Accounts & Contacts		
Opportunities		
Customer Support Reports		

4. Customise your report

The screenshot shows the Microsoft Dynamics 365 Report Builder. On the left, the 'Fields' pane is open, displaying a list of fields under 'Price Price'. The field 'p-022' is selected. On the right, there is a large preview area where data is displayed.

- Add fields from the left pane as shown below.

5. Save or run it.

The screenshot shows the Microsoft Dynamics 365 Report Builder after adding fields. The preview area now displays a table of data with columns: Price Price, Gold price, and Silver price. The data includes rows for p-022 through p-023, showing values like 160,000.0000 and 171,000.0000.

Note: Reports may get varied from the above pictures as the data might be different

15. Create Dashboard

1. Go to the app >> click on the Dashboards tabs.

The screenshot shows the Microsoft Dynamics 365 app interface. The top navigation bar has a 'Dashboards' tab highlighted with a red box. Below the navigation bar, the 'Dashboards' section is visible, showing recent dashboards and options to search for new ones or create a new dashboard.

2. Give a Name and click on Create.

3. Select add component.

The screenshot shows the Microsoft Dynamics 365 interface. The top navigation bar includes 'Employee Management', 'Home', 'Employees', 'Assets', 'Asset Services', 'Projects', 'ProjectTasks', 'Reports', 'Dashboards', and 'Components'. Below the navigation is a grid-based dashboard area with a title 'Dashboard 1'. In the top right corner of the dashboard, there is a red button labeled '+ Component'.

4. Select a Report and click on select.

The screenshot shows a 'Select Report' dialog box. On the left, there is a sidebar with 'Reports' and 'Folders' sections. The 'Reports' section has sub-options like 'Recent', 'Created By Me', 'Private Reports', 'Public Reports', and 'All Reports'. The 'Folders' section has 'Created By Me' and 'Shared With Me'. The main area lists four reports: 'New Report Billing with Items with order' (selected), 'New Items with Billings Report', 'New Prices Report', and 'Days on Market'. Each report entry includes a timestamp and a note about its type (e.g., 'Private Reports').

5. Click Add then click on Save and then click on Done. Activity 2: Create another Dashboard as we discussed in activity 1.

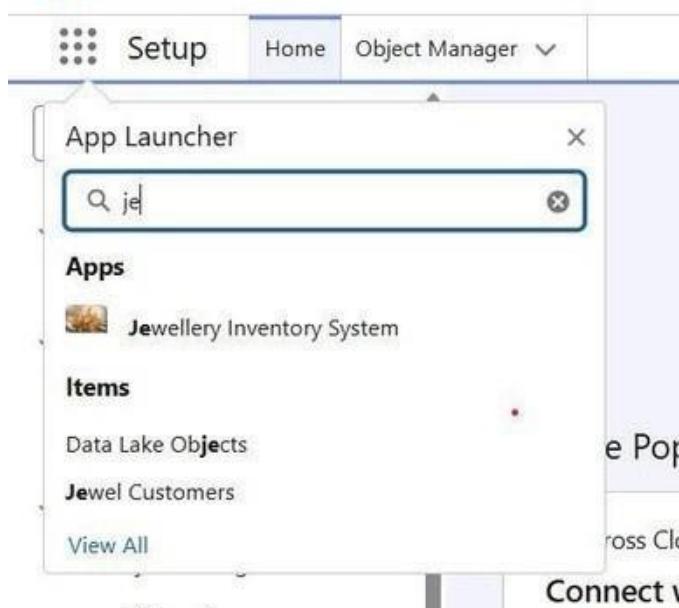
The screenshot shows a dashboard titled 'Dashboard 1'. It contains three reports: 'New Items with Billings Report' (a funnel chart showing 'Sum of total weight: 32.9'), 'New Report Billing with Items with order' (a bar chart showing 'Sum of Amount' for various categories like Gold, Silver, Jewelry, etc.), and 'New Prices Report' (a table showing price details for items p-021 through p-027). At the top right, there are buttons for '+ Component', '+ Filter', 'Save', and 'Done'. Red arrows point from the 'Save' and 'Done' buttons to their respective positions on the interface.

16. Create a Flow

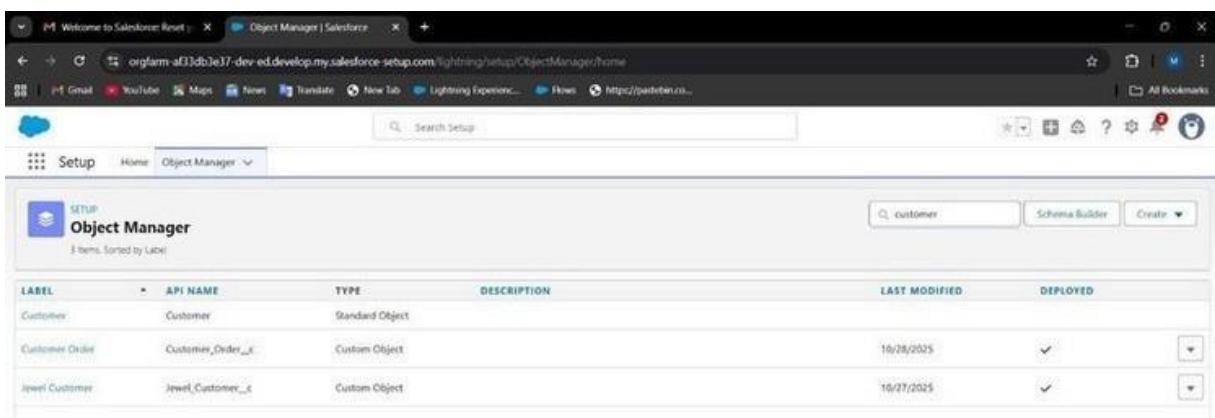
The screenshot shows the Microsoft Power Automate 'Flow Builder' interface. A flow is being created for the 'Billing' object, triggered by a 'Record is updated' event. The flow consists of two steps: 'Action: Email'. A red arrow points to the 'Action' icon in the flow canvas.

Output screenshots

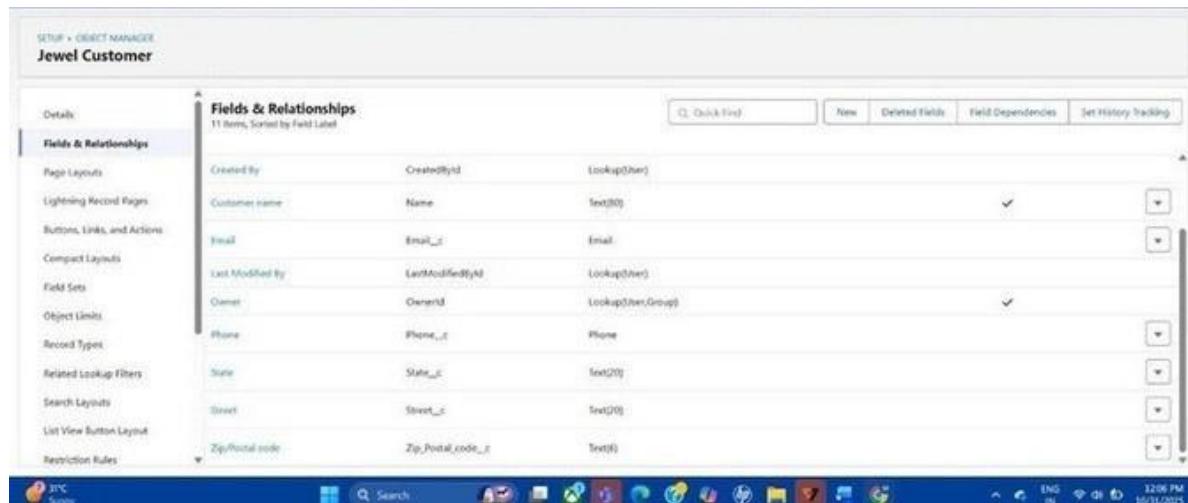
1. Search for jewellery inventory system:



2. Creating all customer related objects



3. Creating customer related object fields



4. Created sample records for Customers, item, prices, Billings

The image displays four separate windows of the "Jewellery Inventory System" application, each showing a "Recently Viewed" list of items.

- Customer Orders:** Shows 15 items updated a few seconds ago. The list includes Customer Order-15, Customer Order-14, Customer Order-13, Customer Order-12, Customer Order-11, Customer Order-10, Customer Order-09, Customer Order-08, Customer Order-07, Customer Order-06, and Customer Order-05.
- Prices:** Shows 14 items updated a few seconds ago. The list includes Price-14, Price-13, Price-12, Price-11, Price-10, Price-09, Price-08, Price-07, Price-06, Price-05, and Price-04.
- Items:** Shows 14 items updated a few seconds ago. The list includes Item-14, Item-07, Item-13, Item-12, Item-11, Item-10, Item-09, Item-08, Item-06, Item-05, and Item-04.
- Billings:** Shows 14 items updated a few seconds ago. The list includes Billing-14, Billing-13, Billing-12, Billing-11, Billing-10, Billing-09, Billing-08, Billing-07, Billing-06, Billing-05, and Billing-04.

Jewellery Inventory System

Jewel Customers

Recently Viewed

13 items • Updated a few seconds ago

	<input type="checkbox"/> Customer name
1	<input type="checkbox"/> Abi
2	<input type="checkbox"/> Reena
3	<input type="checkbox"/> Sneha
4	<input type="checkbox"/> Rahan
5	<input type="checkbox"/> Bavya
6	<input type="checkbox"/> Karthi
7	<input type="checkbox"/> Kavya
8	<input type="checkbox"/> Rahul Mehta
9	<input type="checkbox"/> Priya Sharma
10	<input type="checkbox"/> Riya Jewels
11	<input type="checkbox"/> Priya

5. Create the report for the records

Jewellery Inventory System

Reports

Recent

5 items

Search recent reports...

REPORTS	Report Name	Description	Folder	Created By	Created On
Recent	Prices Report		Private Reports	Muthamil Selvi P.	10/29/2025, 1:15 PM
Created by Me	Prices Report		Private Reports	Muthamil Selvi P.	10/28/2025, 7:48 AM
Private Reports	Billings with item and customer order		Private Reports	Muthamil Selvi P.	10/28/2025, 7:33 PM
Public Reports	Item with Billings Report		Private Reports	Muthamil Selvi P.	10/29/2025, 1:12 PM

6. Dashboard View of reports

Jewellery Inventory System

Dashboards

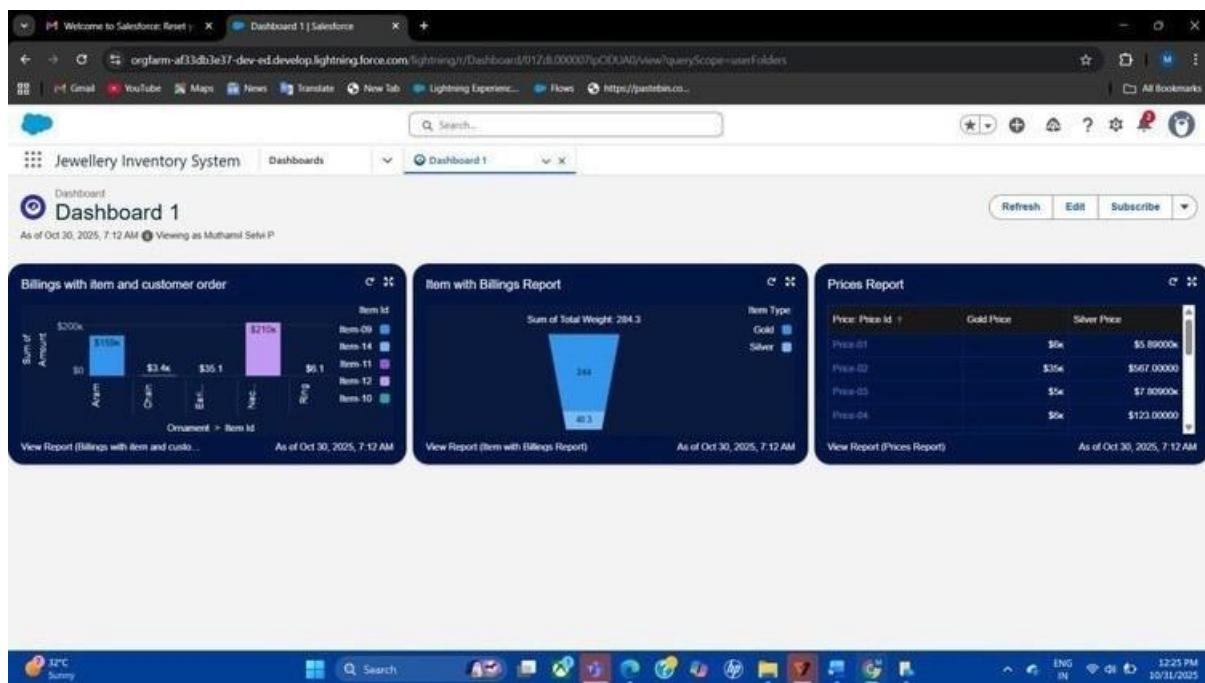
Recent

2 items

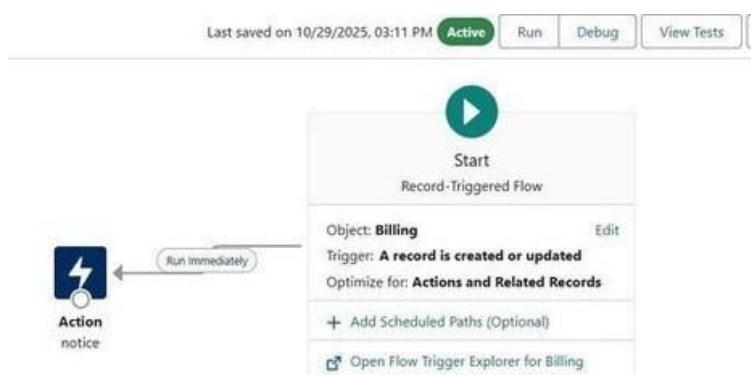
Search recent dashboards...

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On
Recent	Dashboard 1		Private Dashboards	Muthamil Selvi P.	10/28/2025, 10:34 AM
Created by Me	Dashboard 2		Private Dashboards	Muthamil Selvi P.	10/28/2025, 7:36 PM

7. Report view in dashboard



8. Workflow or Flow Setup Page



Conclusion:

The CRM Application for Jewel Management effectively transforms the traditional jewelry business workflow into a fully digital and automated system using Salesforce. It streamlines key operations such as customer relationship management, product tracking, and order processing with improved accuracy and speed. This project showcases how a customized Salesforce CRM can be tailored to meet the specific needs of the jewelry industry enhancing productivity, data management, and customer satisfaction.

By reducing manual efforts and enabling real-time analytics, the system empowers jewelers to make smarter, data-driven business decisions and ensures a seamless experience for both customers and administrators.