NAAN MUDHALVAN SKILL DEVELOPMENT PROGRAM

SB8067-SALESFORCE DEVELOPER

A SKILL TRAINING REPORT

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in recognition of the completion of the Skill Training course as part of the curriculum during Semester Seven

BACHELOR OF ENGINEERING

IN

COMPUTER SCIENCE AND ENGINEERING

PSN INSTITUTE OF TECHNOLOGY & SCIENCE,

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NOVEMBER - 2025

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**CRMApplication 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 **recordsandenhancecustomerrelationships**.
- To manage supplier details and monitor purchase orders efficiently.
- To ensure **dataaccuracy,security,andcontrolled** 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 **flexiblesolution**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

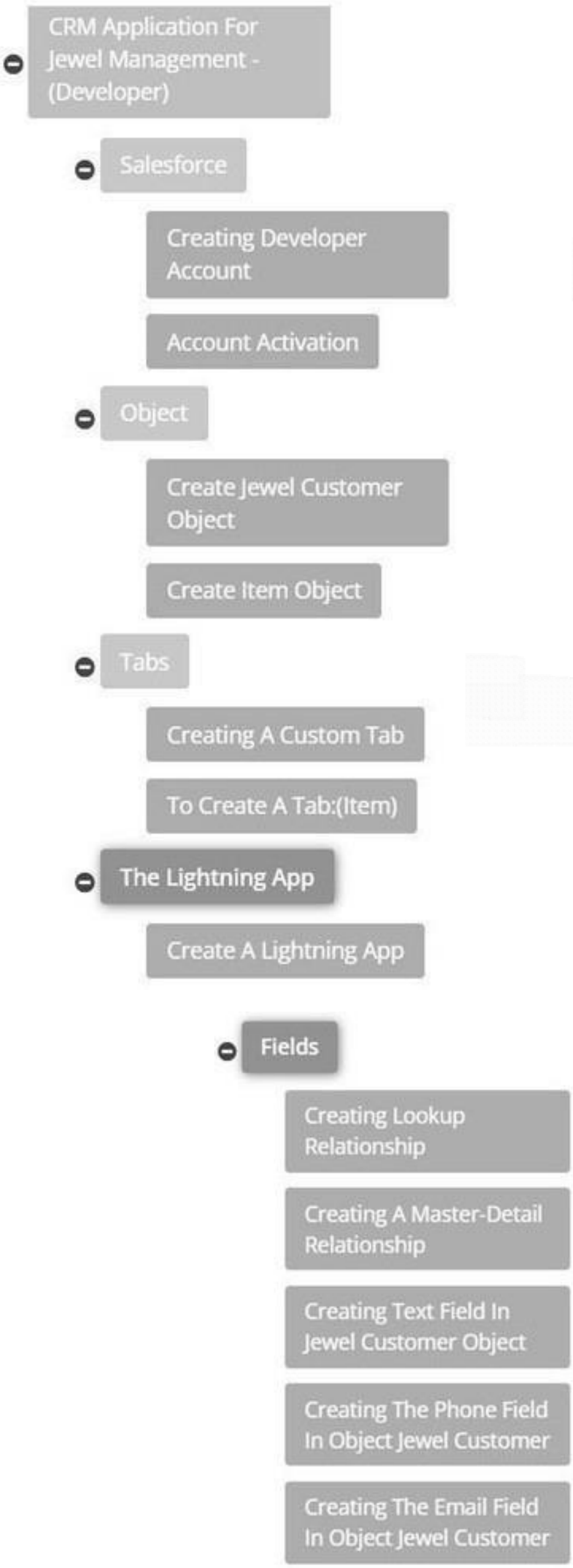
Programming Language:

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

User Interface

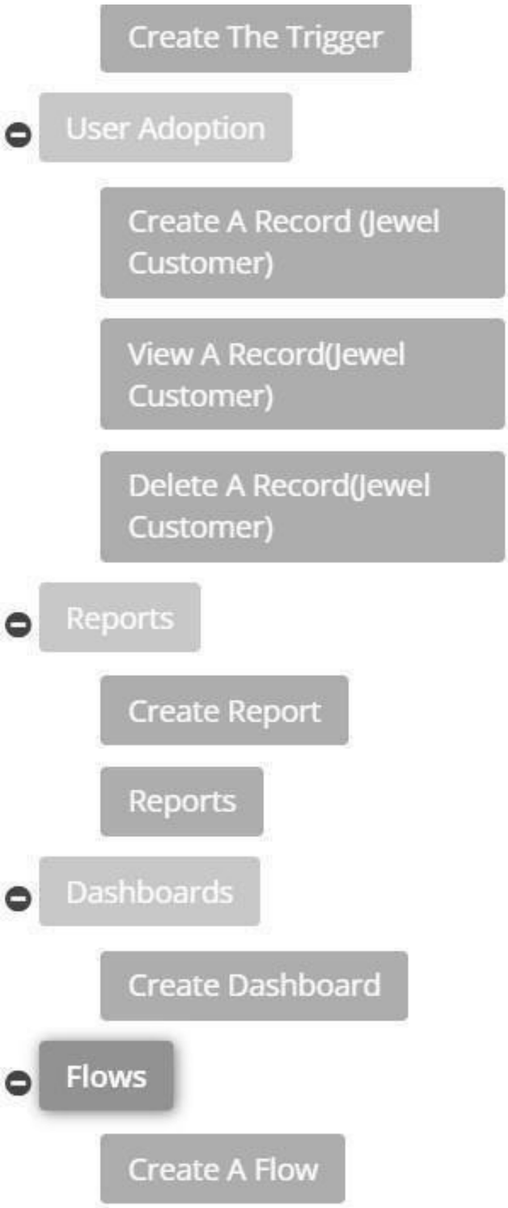
- Lightning App Builder and Salesforce Lightning Pages

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 :

Managesd ifferentuserroleslike Admin, Gold Smith, and Worker JW.

Customer Management :

Storescustomerdetails,purchase history, and preferences.

Product Management :

Handlesjew elryitemdetails such as Gold, Silver, Diamond, and related properties.

Price Book Management :

Maintainsproductpricingfor 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.

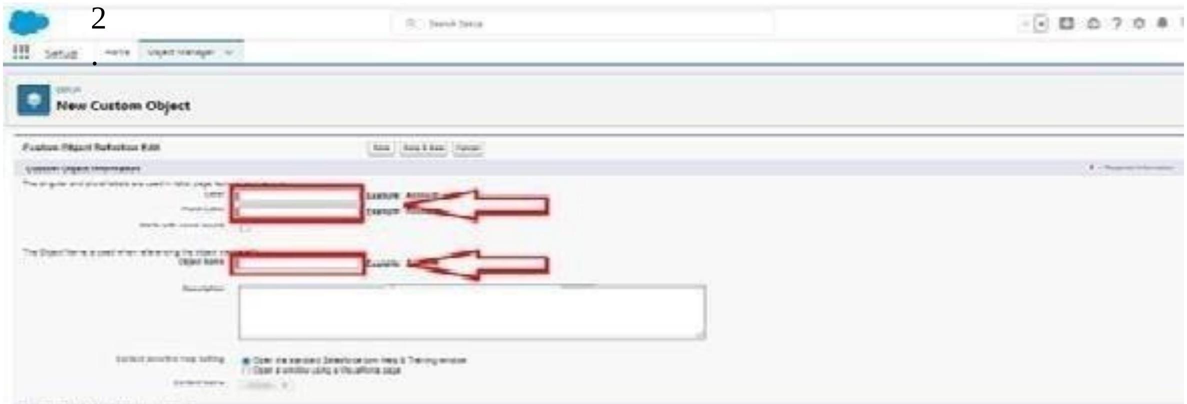
Implementation of the model

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
2. 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

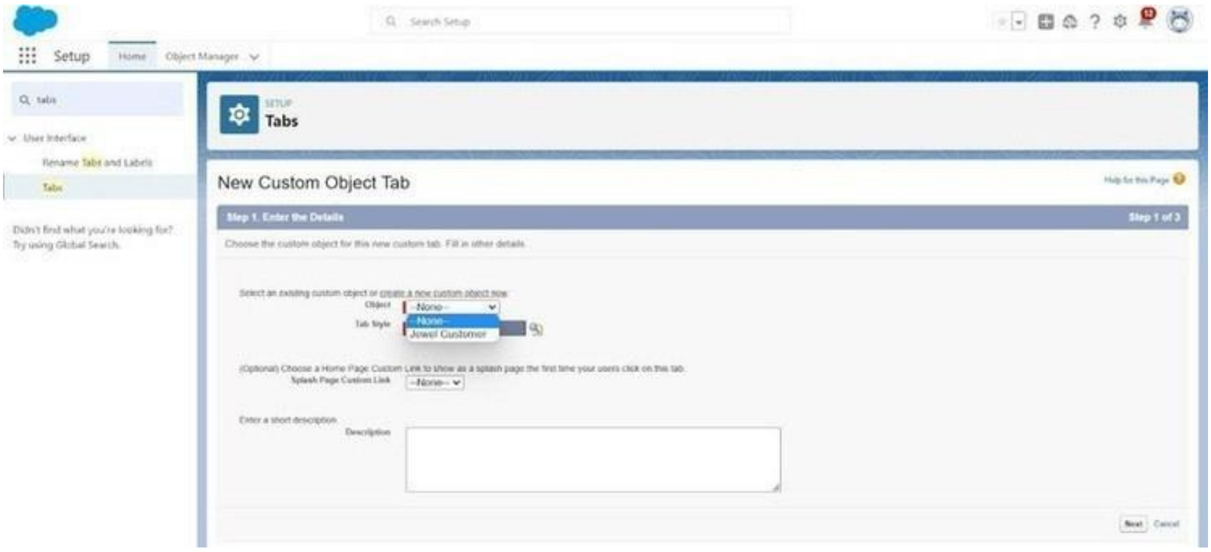
2. Click on Allow reports.
3. Allow search >> Save.

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)

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.

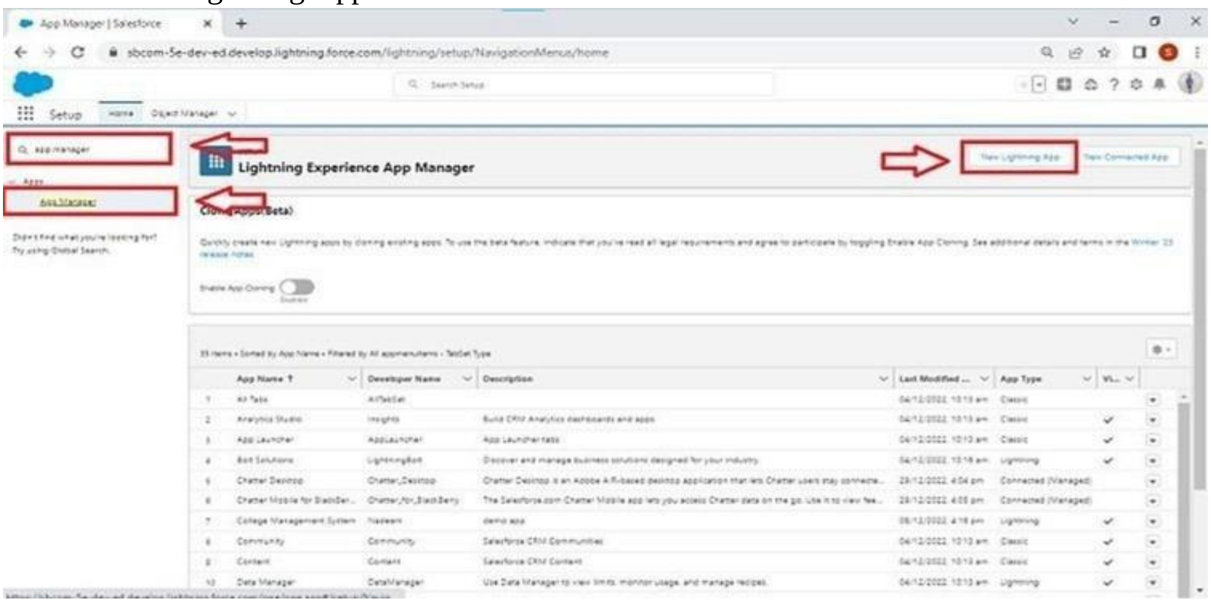


4. Create a Lightning App

To create a lightning app page:

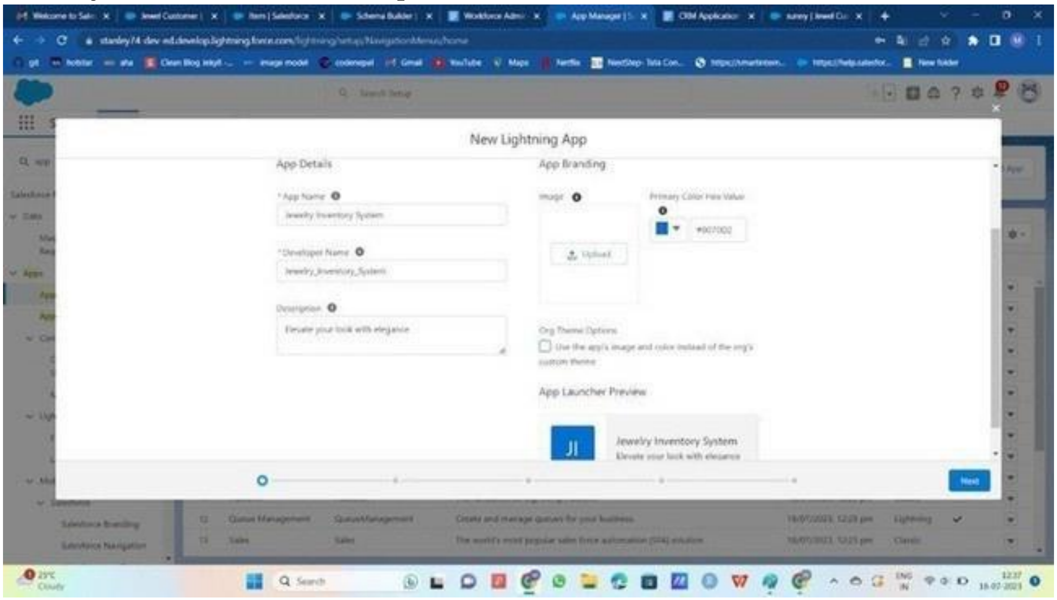
1. Go to setup page >> search “app manager” in quick find >> select “app manager” >>

2. click on New lightning App.

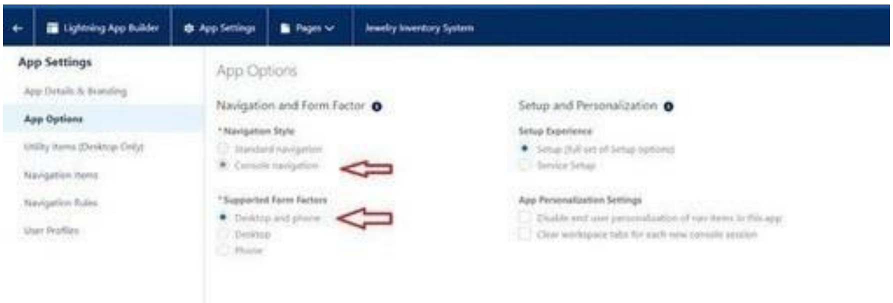


3. Fill the app name in app details and branding as follow
   App Name : Jewellery Inventory System.
   Developer Name : This will auto populated
   Description : Elevate your look with elegance
   Image : optional (if you want to give any image you can otherwise not mandatory)

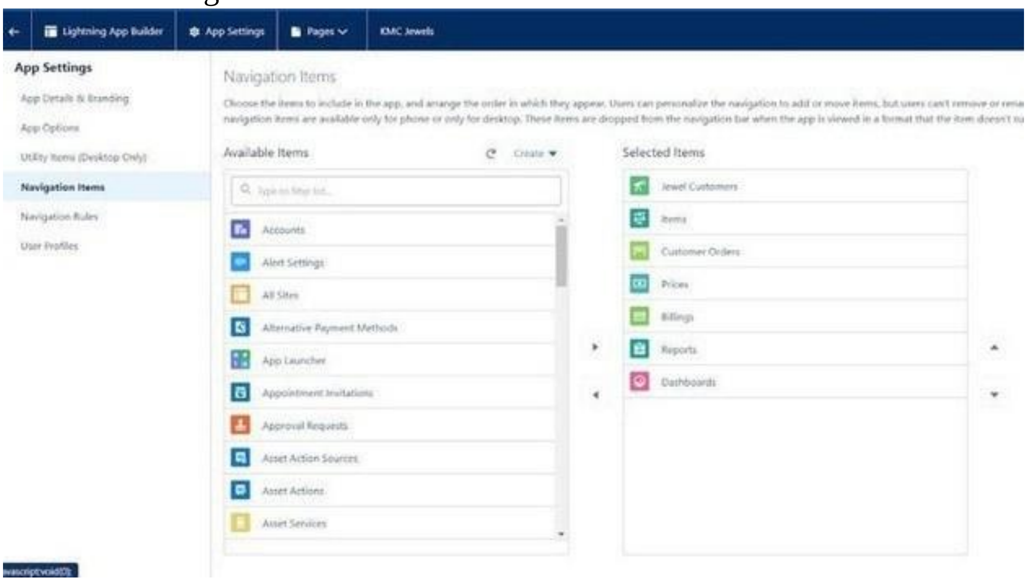
Primary colour hex value : keep this default.



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

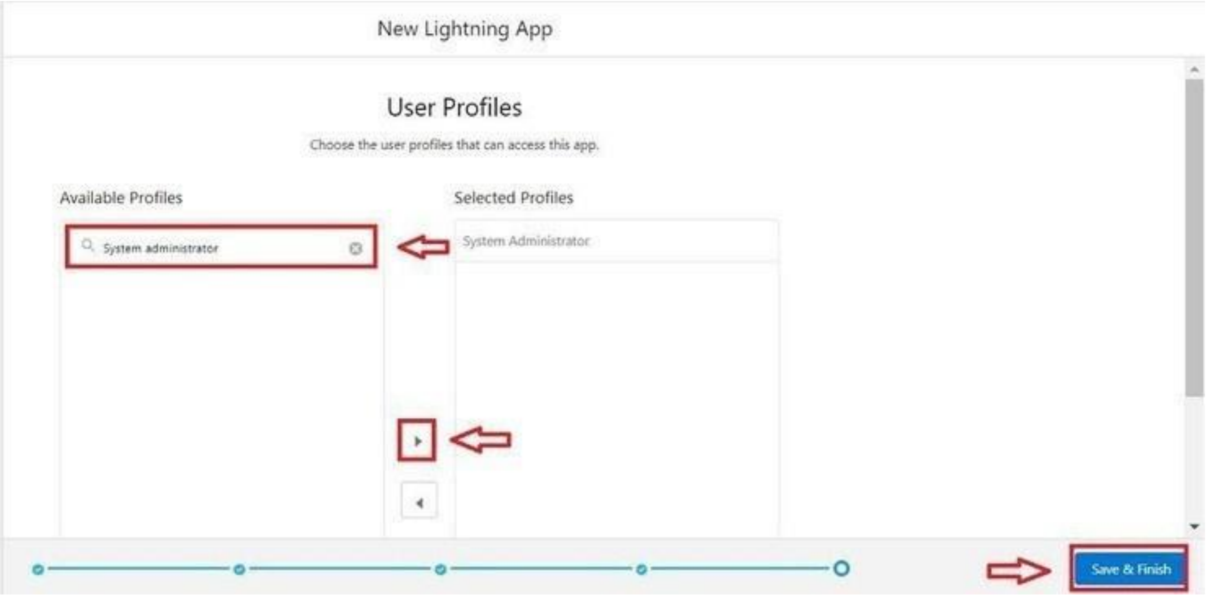


(Utility Items) keep it as default >> Next.
5. To Add Navigation Items:



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.

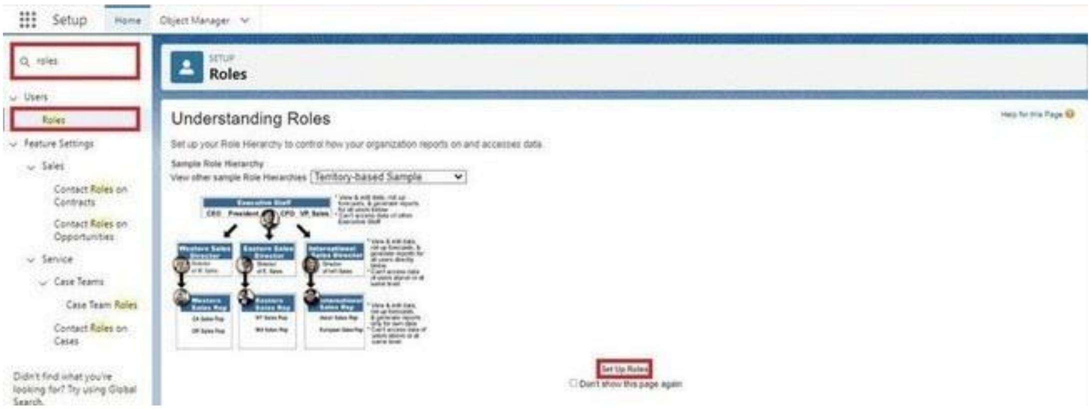
Scroll down and Click on Save.

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.
3. 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.

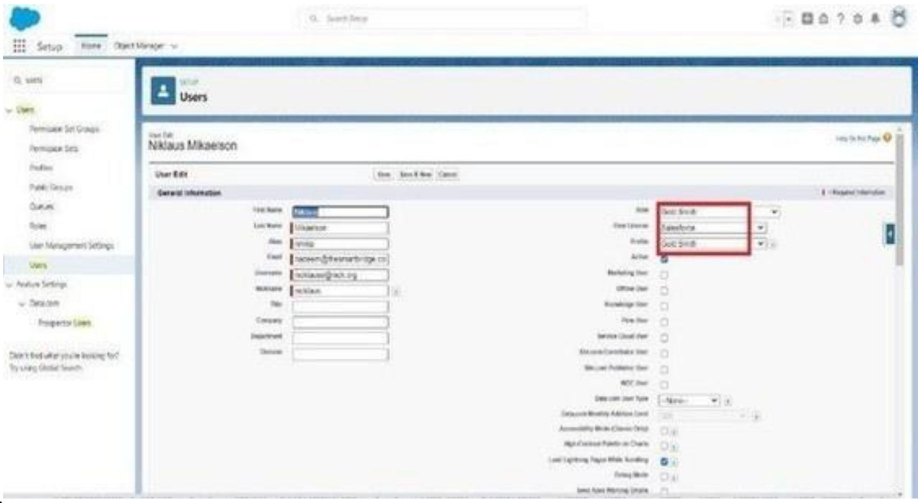


2.Click on Expand All and click on add role under whom this role works.

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.
2. Fill in the fields
    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.
2. Fill in the fields
    - 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.

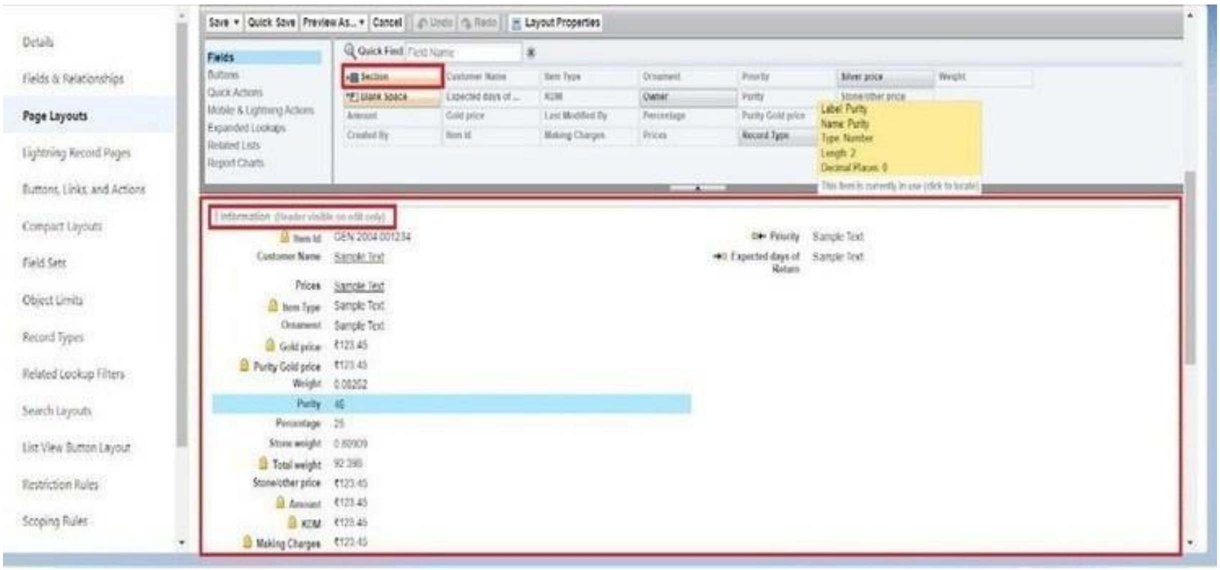
Note:

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.

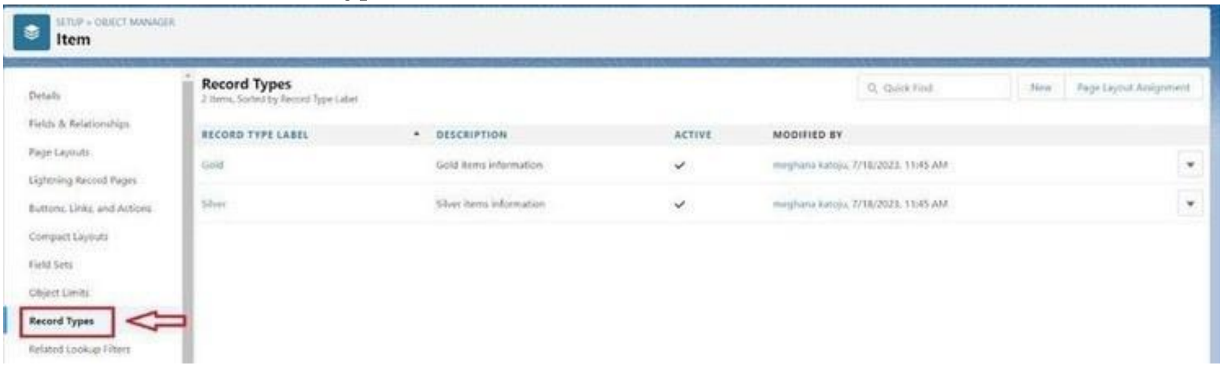
3. Arrange the field as shown in the Information Section ,remove fields which are related to Silver and click Ok.



4. Click Save.
5. Make sure your page layout looks like the picture above.Like this create same for silver page layout.

11. To create a Record Type

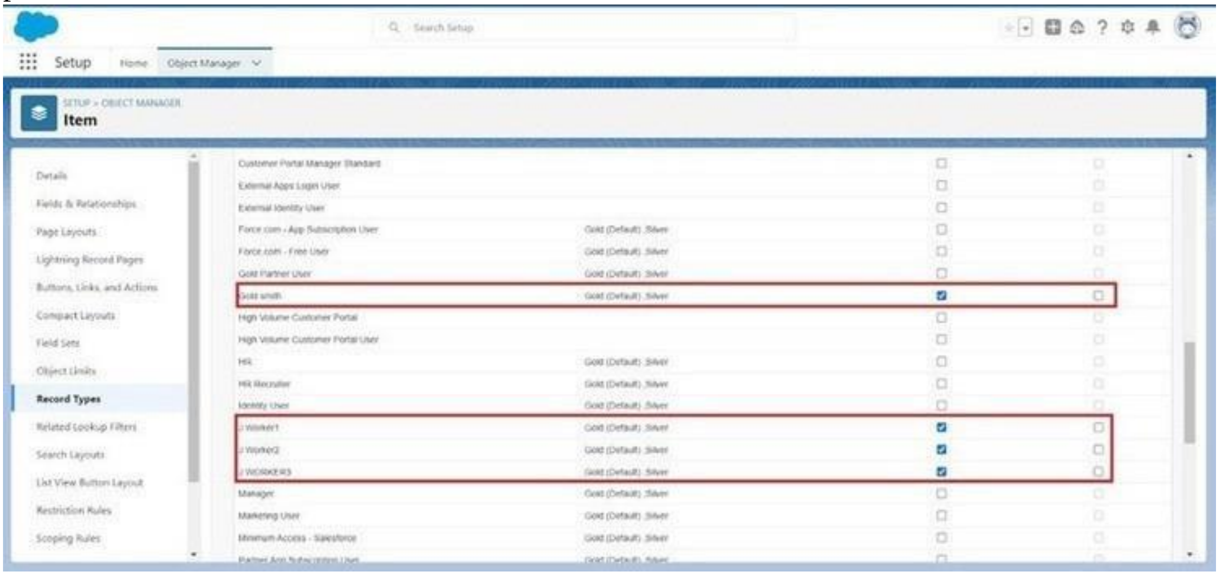
1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
2. Click on the Record Types >> click New.



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

4. Uncheck for “Make Available”.

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



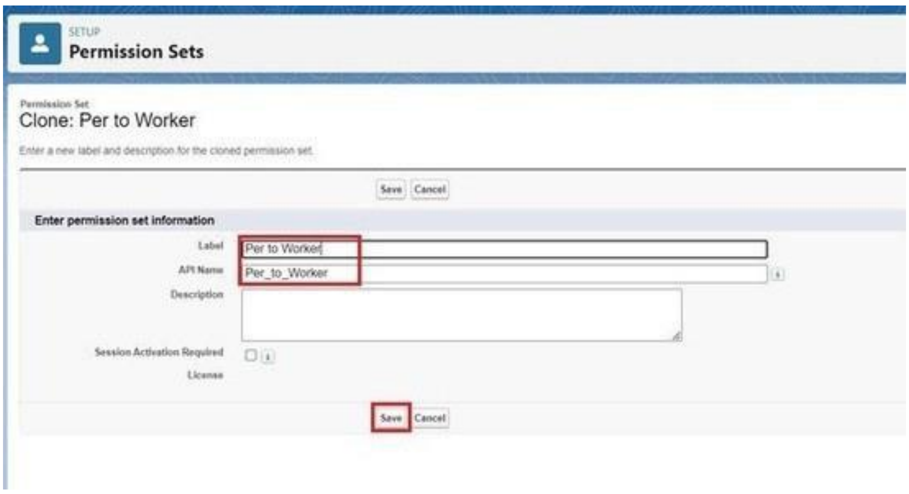
6. Select “Apply a different layout for each profile”, and change page layout to “Page Layout for Gold“for Gold Smith,Worker and System Administrator ? save & new.

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

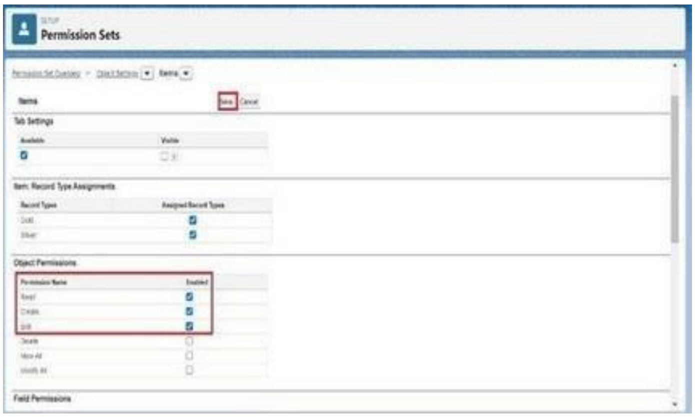
Note: Use page layout for Silver.

11. Creating permission set

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

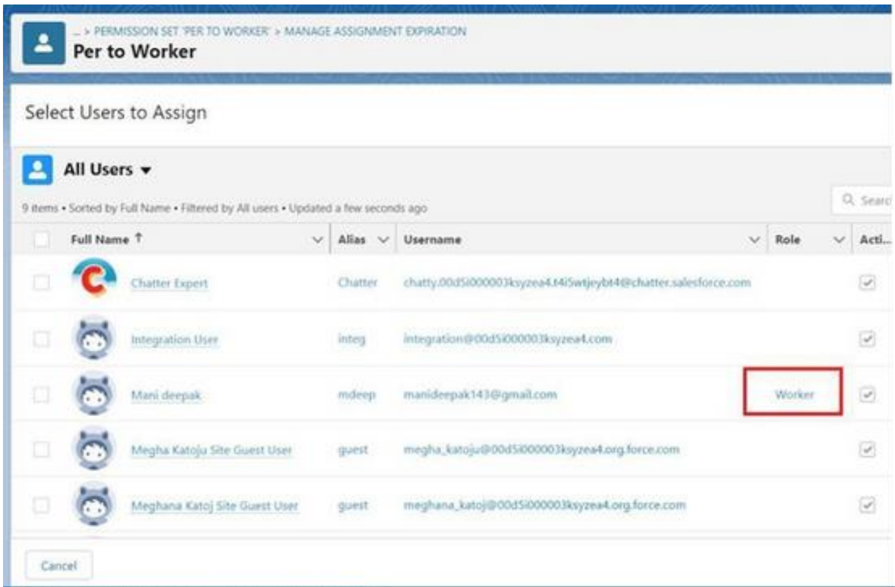


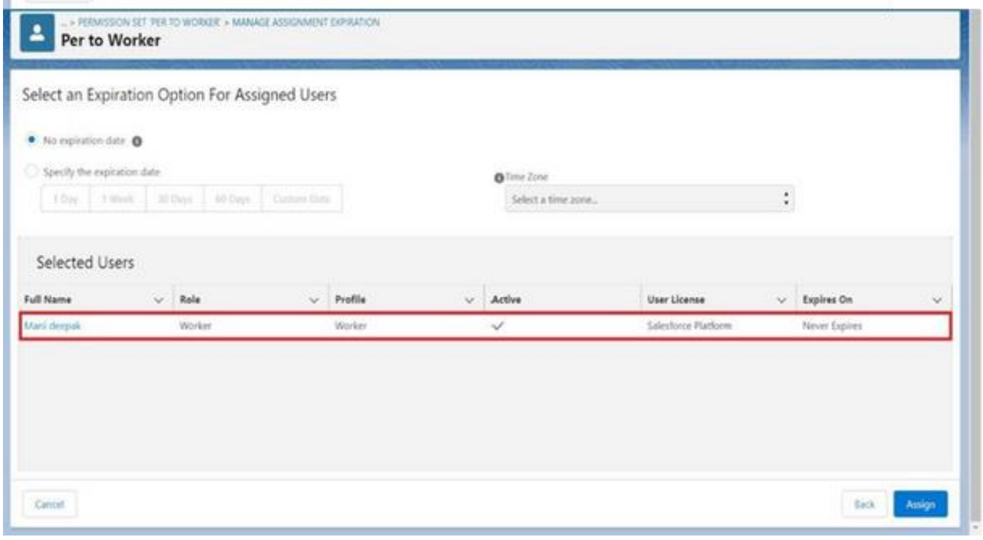
3. Under Apps Select object settings.



.

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





12. Create a Trigger Handler class

Triggerhandler:

Atrigger 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 {

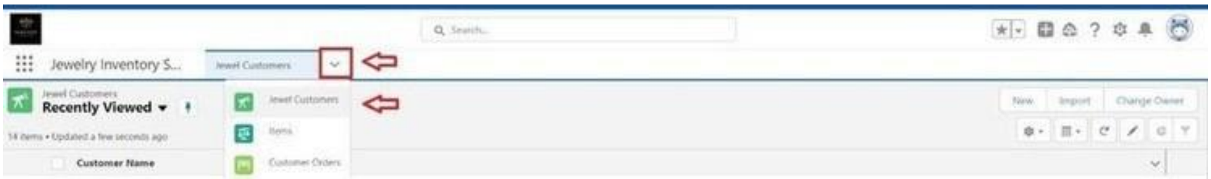
```
    public static void handleBeforeInsert(List<Billing__c> newBillings)
        { for (Billing__c billing : newBillings) {
            billing.Paid_Amount__c = billing.Paying_Amount__c;
        }
    }
    public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap,

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.

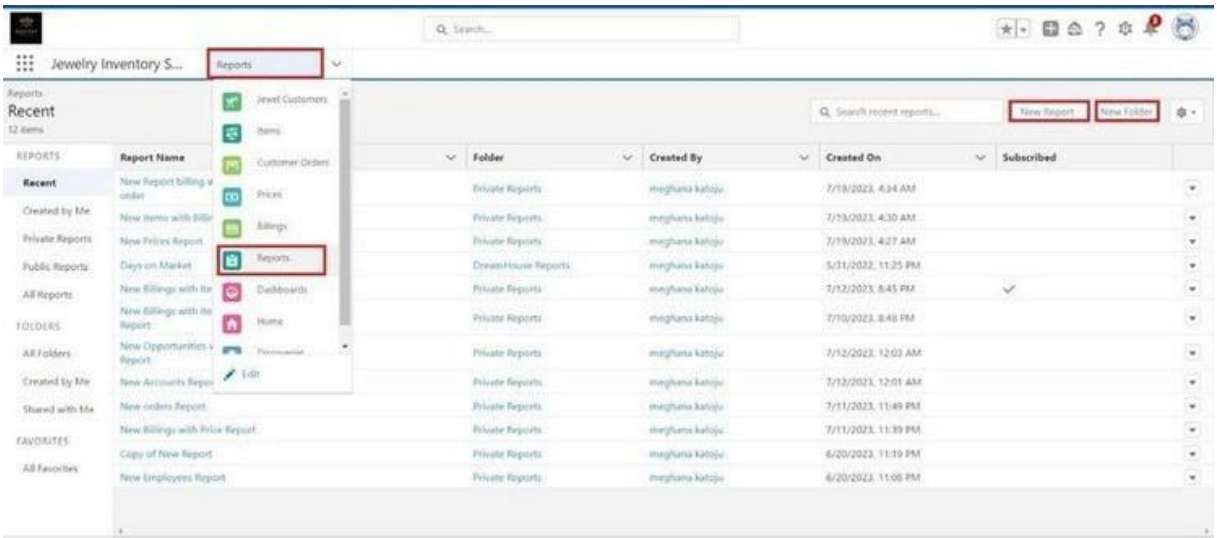
4. Click New.



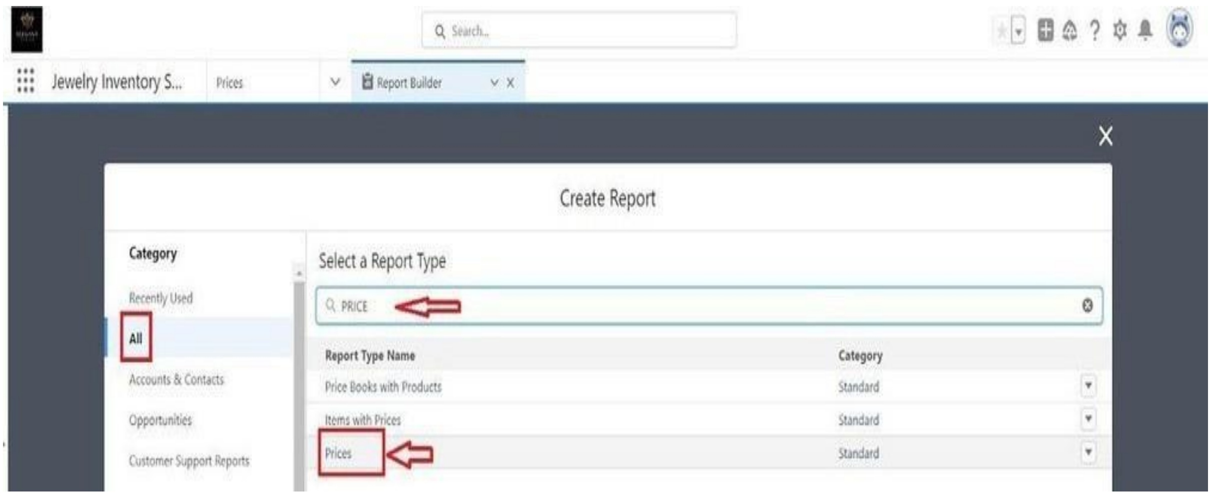
5. Fill the Details and click on Save.

14. Create Report

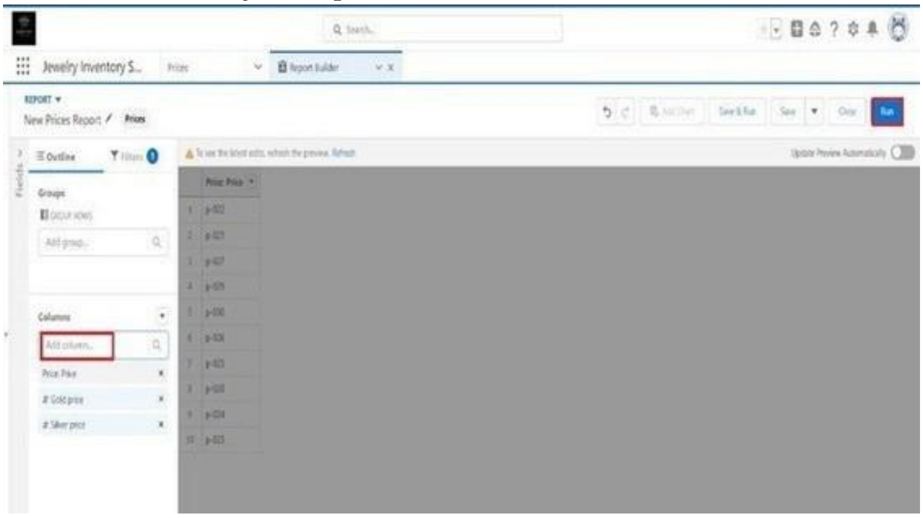
1. Go to the app >> click on the reports tab
2. Click New Report.



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

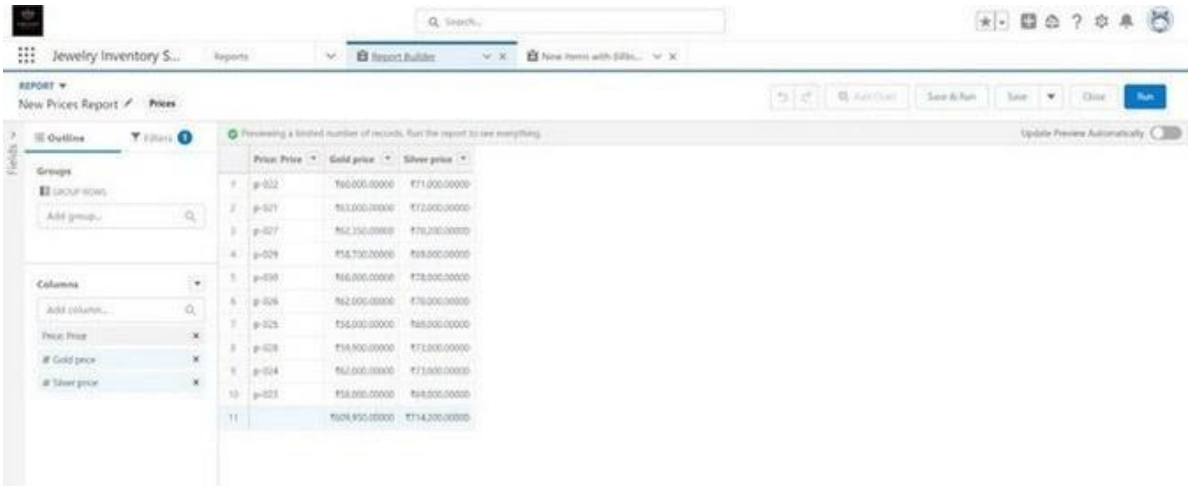


4. Customise your report



• Add fields from the left pane as shown below.

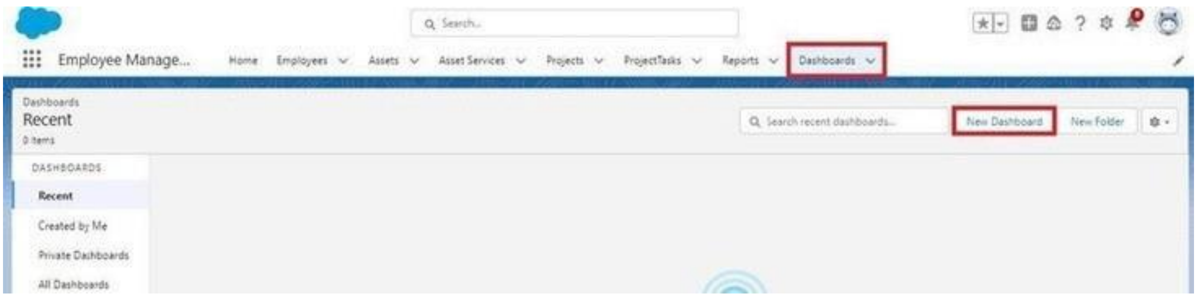
5. Save or run it.



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

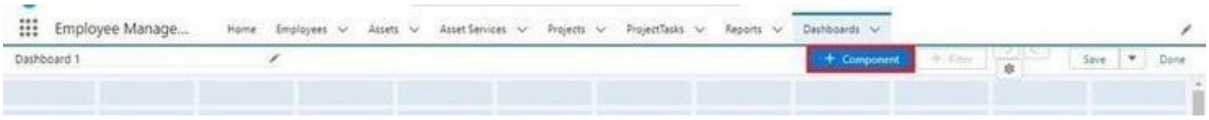
15. Create Dashboard

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

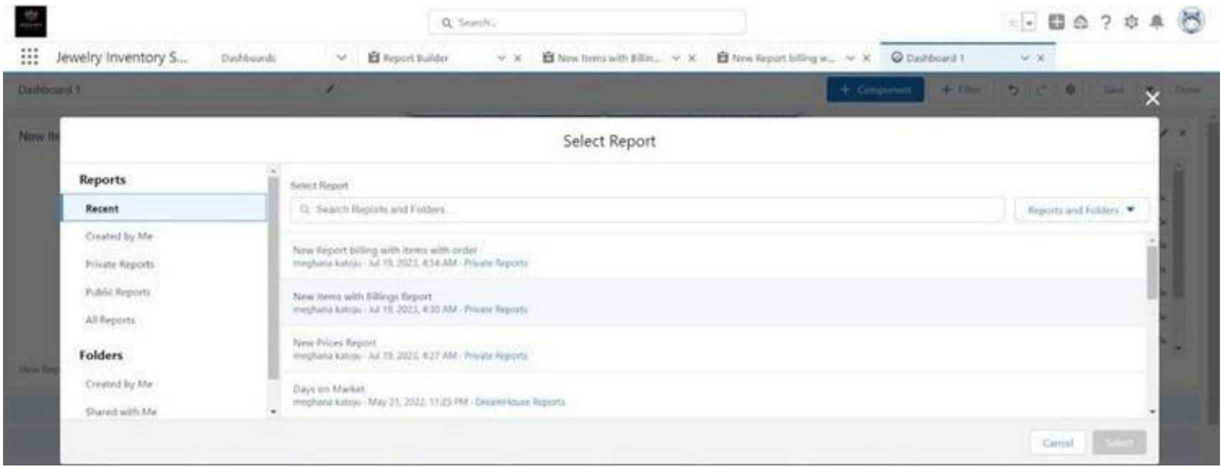


2. Give a Name and click on Create.

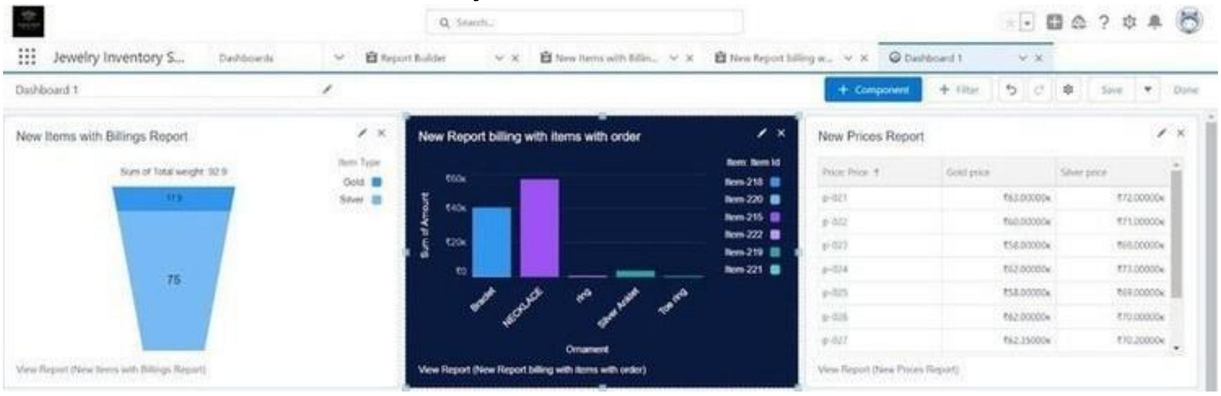
3. Select add component.



4. Select a Report and click on select.



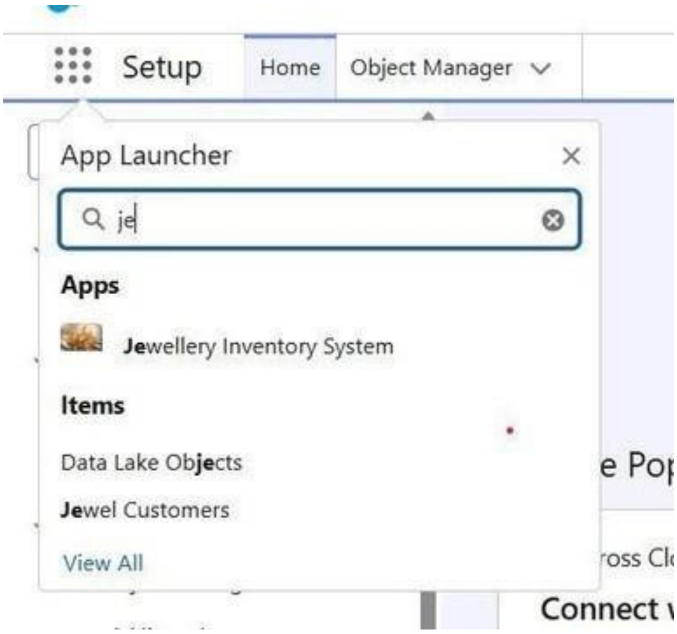
5. Click Add then click on Save and then click on Done.Activity 2: Create another Dashboard as we discussed in activity 1.



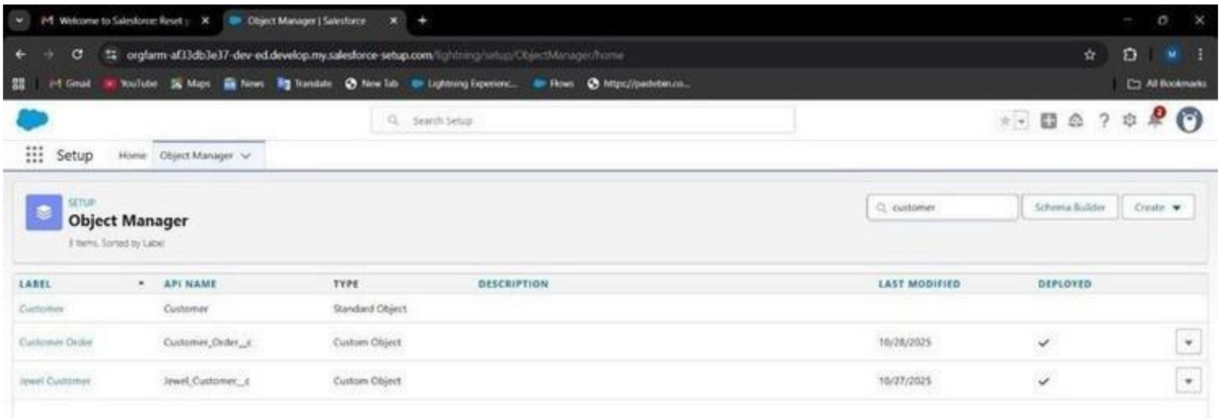
16. Create a Flow

Output screenshots

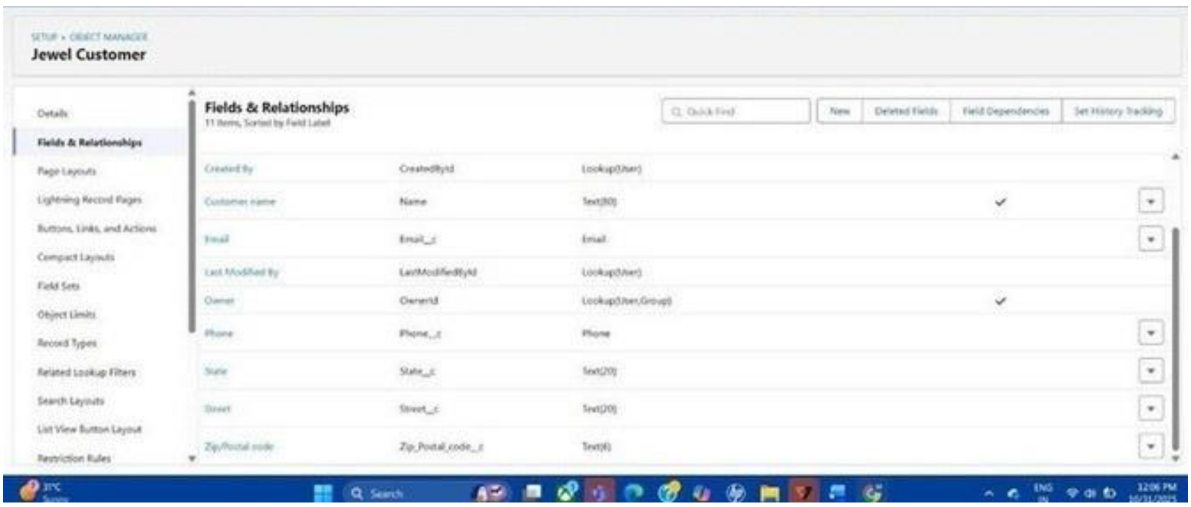
1. Search for jewellery inventory system:



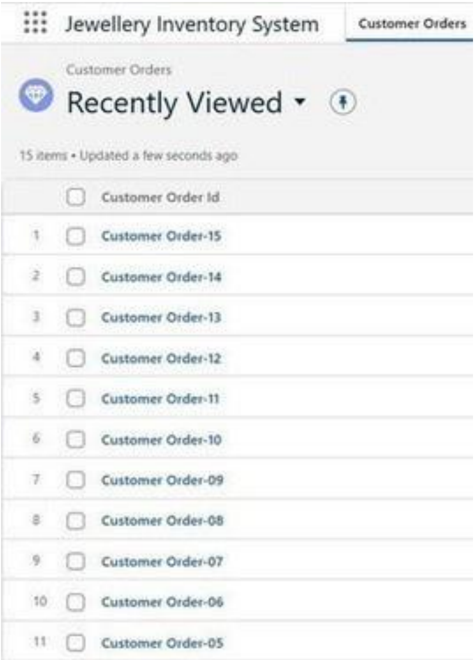
2. Creating all customer related objects

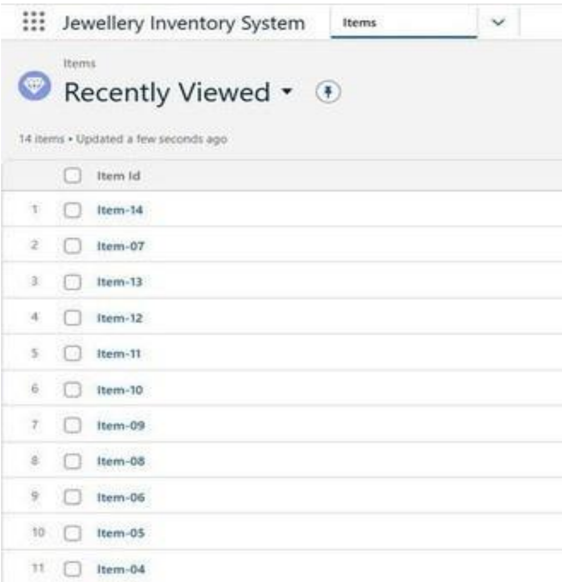


3. Creating customer related object fields

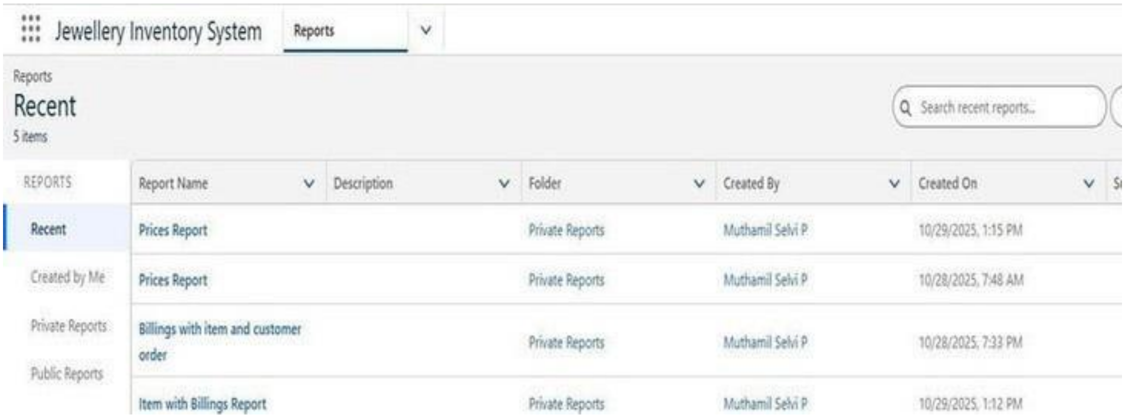


4. Created sample records for Customers, item, prices, Billings

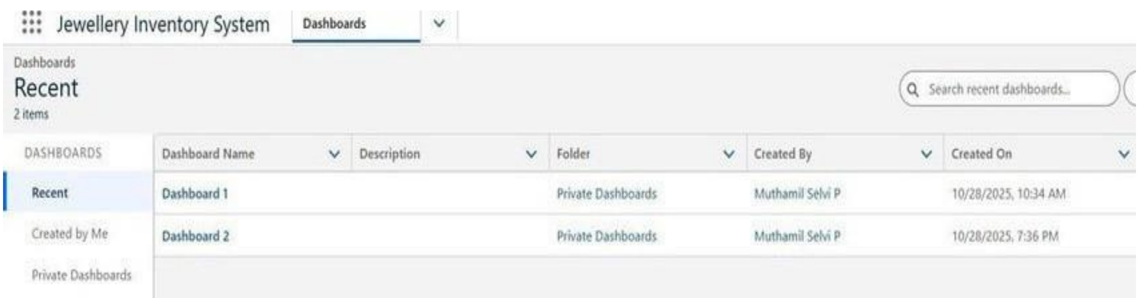




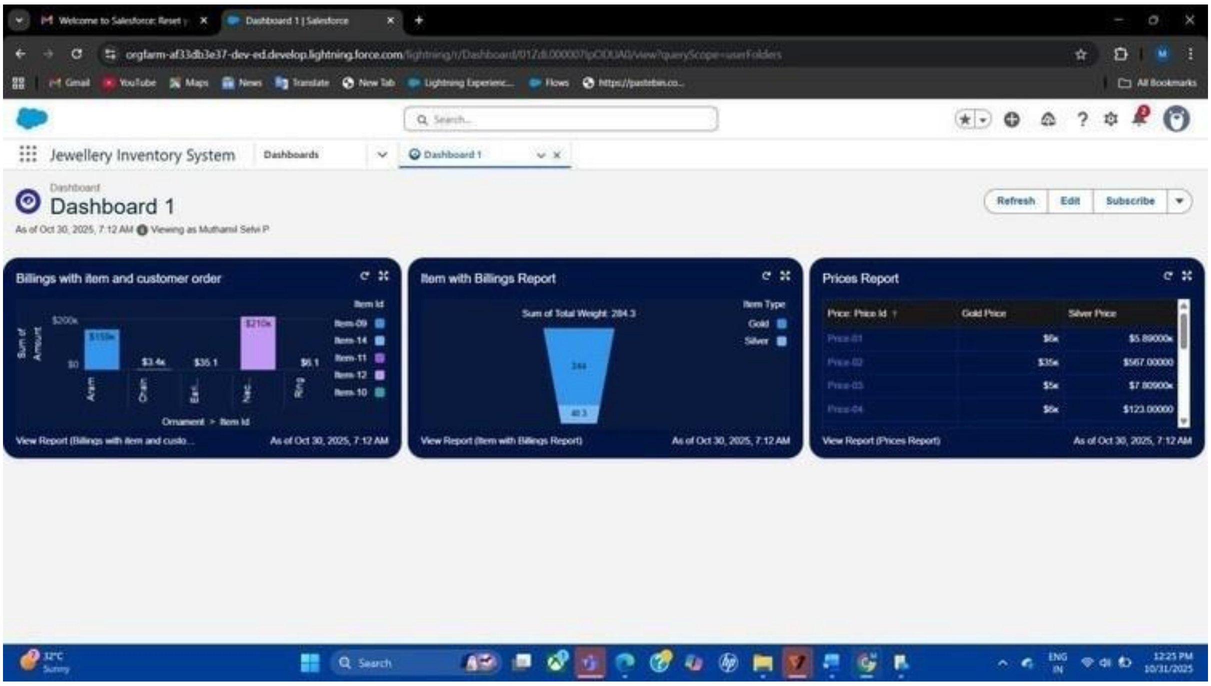
5. **Create the report for the records**



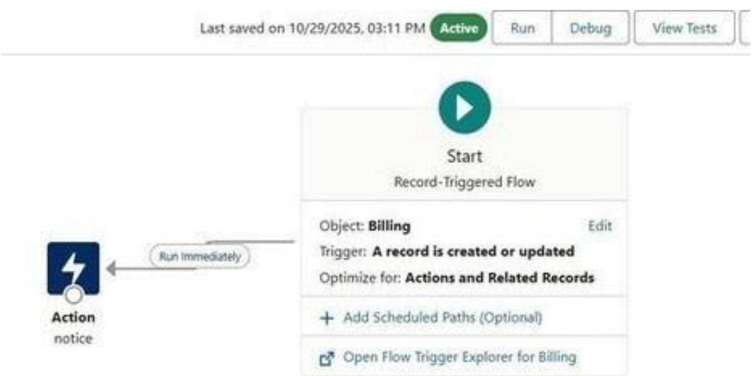
6. **Dashboard View of reports**



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.