

CRM APPLICATION FOR JEWEL MANAGEMENT (DEVELOPER)

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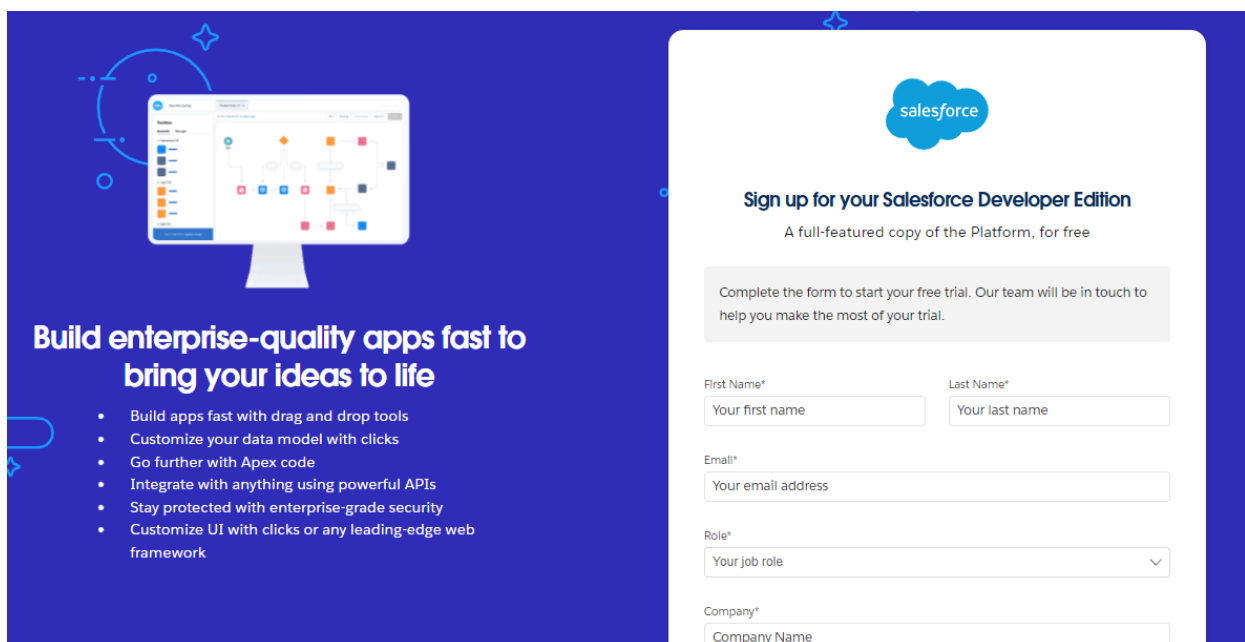
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INTRODUCTION

A CRM (Customer Relationship Management) application for jewel management helps jewellery businesses manage customer interactions, streamline sales, and track inventory. It stores detailed customer profiles, tracks orders, and offers personalized recommendations based on preferences. The system integrates inventory management, sales reporting, and communication tools (e.g., automated alerts, loyalty programs). It also enables secure transactions, efficient order processing, and data-driven decision-making, enhancing customer satisfaction and business operations.

Creating Developer Account

- Go to <https://developer.salesforce.com/signup> for creating developer account.



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First Name* Last Name*

Email*

Role*

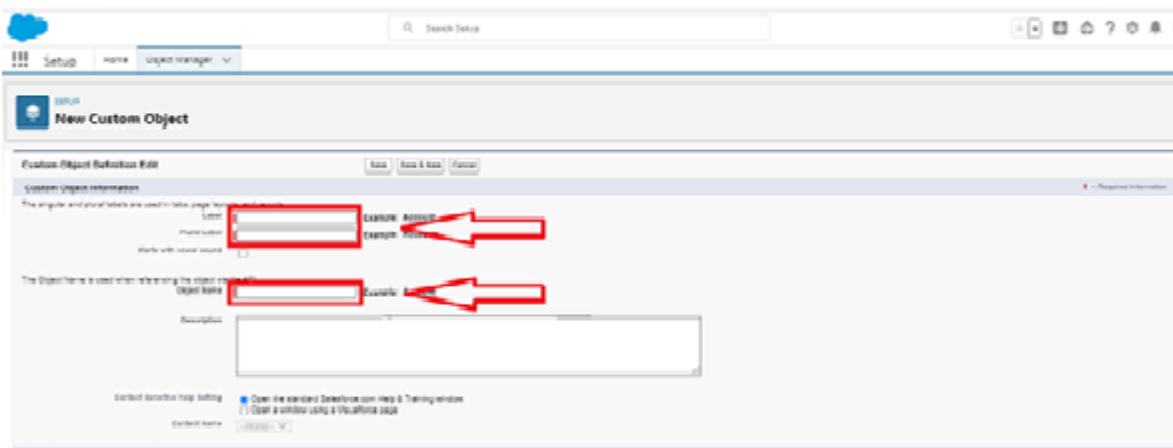
Company*

Create jewel customer object

1. Click on object manager
2. Click on create and click on custom object



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



- Record name = Customer name
- Data type = Text

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name Example: Account Name

Data Type

Optional Features

☒ Allow Reports
☐ Allow Activities
☐ Track Field History
☐ Allow in Chatter Groups
☐ Enable Licensing [i](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

☒ Allow Sharing
☒ Allow Bulk API Access
☒ Allow Streaming API Access

Deployment Status [What is this?](#)

☐ In Development
☒ Deployed

Create item object

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
 - Enter the label name >> Item
 - Plural label name >> Items
 - Enter Record Name Label and Format
 - Record Name >> Item Id
 - Data Type >> Auto Number
 - Display Format >> Item-{00}
 - Starting Number >> 1
2. Click on Allow reports.
3. Allow search >> Save.

Creating a Custom Tab

- 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. Lightning Page tabs allow you 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	

- 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.

Search Setup

Setup Home Object Manager

Q tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

New Custom Object Tab

Help for this Page

Step 1: Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or create a new custom object now

Object --None--

Tab Style Jewel Customer

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link --None--

Enter a short description.

Description

Next Cancel

To create a tab: (item)

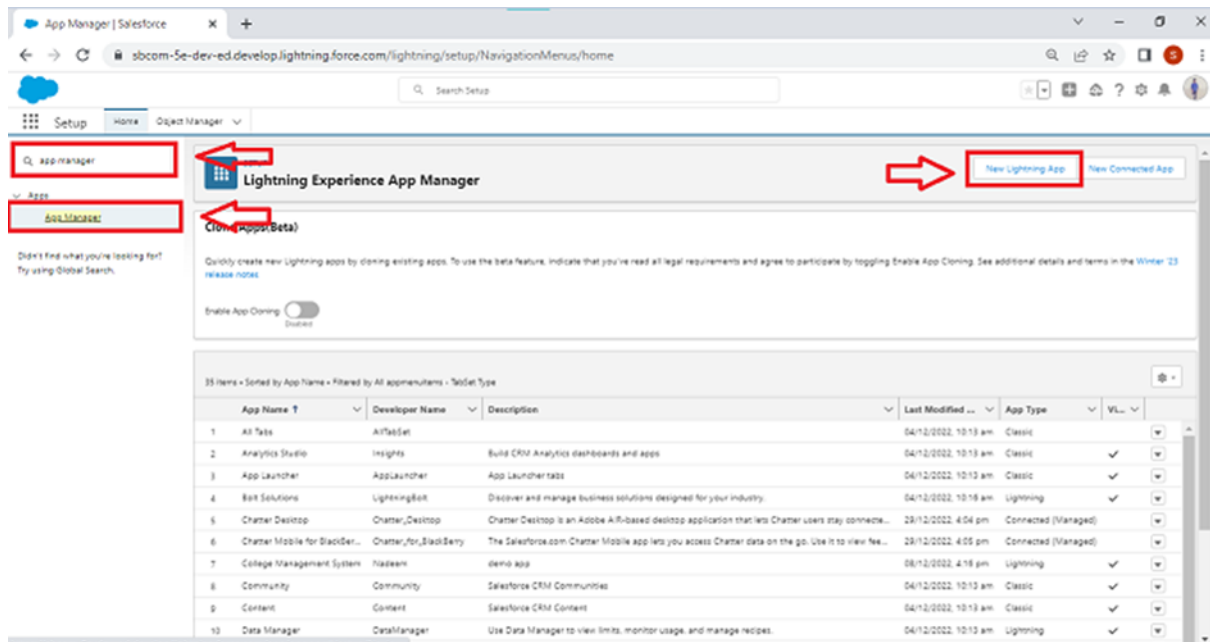
- Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
- Select Object(Item) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) keep it as default >> Save.

And also create tabs for:

Customer Order, Price, Billing objects.

Create A lightning app

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



Fill the app name in app details and branding as follow

App Name : Jewellery Inventory System.

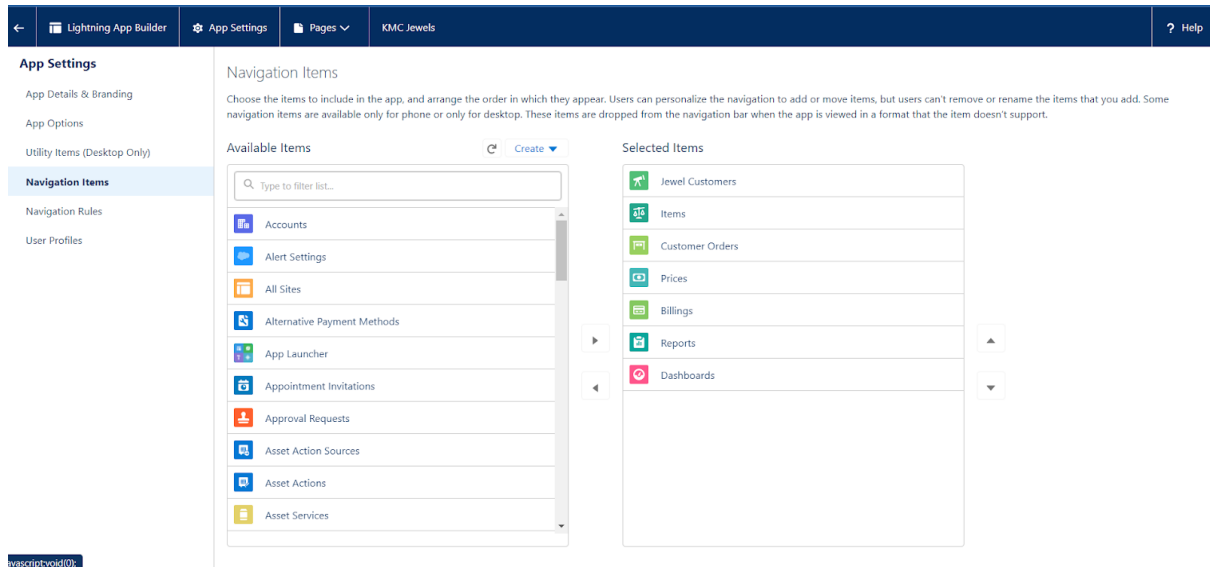
Developer Name : This will auto populated

Description : Elevate your look with elegance

Primary colour hex value : keep this default.

And add the navigation items:

JewelCustomer, Item, Customer Order, Price, Billing, Reports, Dashboard



And save & finish.

Fields

Creating lookup Relationship

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.

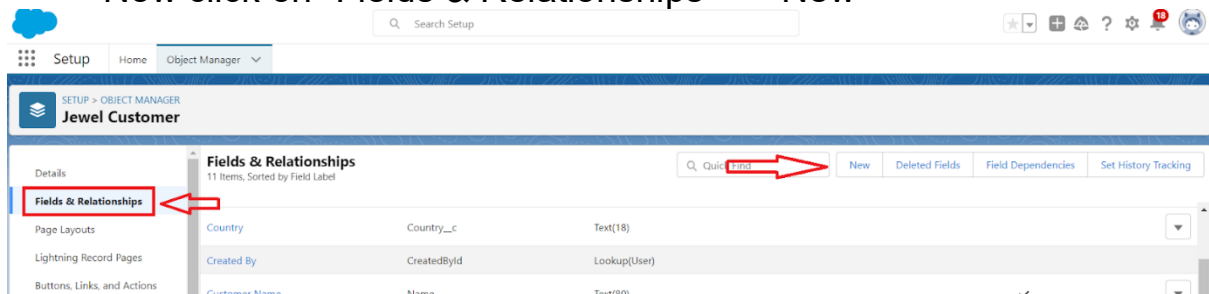
6. Next >> Next >> Save

Creating a Master-Detail Relationship

- Go to the setup page >> click on object manager >> type object name (Customer Order) in the quick find bar >> click on the object.
- Click on fields & relationships >> click on New.
- Select “Master-Detail relationship” as data type and click Next .
- Select the related object “ Item”.
- Give Field Label as “Item” and click Next.
- Next >> Next >> Save.

Creating Text Field in Jewel Customer Object

- Go to setup >> click on Object Manager >> type object name (Jewel Customer) in quick find bar >> click on the object.
- Now click on “Fields & Relationships” >> New



Fill the above as following:

- Field Label: City
- Length : 20
- Field Name : gets auto generated
- Click on Next >> Next >> Save and new.

The screenshot shows the Salesforce Setup interface for the 'Jewel Customer' object. The left sidebar lists navigation options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, and Field Sets. The main content area is titled 'New Custom Field' and shows 'Step 2. Enter the details'. The 'Field Label' is 'City', 'Length' is '20', and 'Field Name' is 'City'. The 'Step 2. Enter the details' section is highlighted.

Creating the Phone field in object Jewel Customer

1. Go to setup >> click on Object Manager >> type object name (Jewel Customer) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Phone” and click Next .
4. Given the Field Label as “ Phone ”.
5. And save.

The screenshot shows the Salesforce Setup interface for the 'Jewel Customer' object. The left sidebar lists navigation options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, and Scoping Rules. The main content area is titled 'New Custom Field' and shows 'Step 2. Enter the details'. The 'Field Label' is 'Phone', 'Field Name' is 'Phone', and 'Field Name' is 'Phone'. The 'Step 2. Enter the details' section is highlighted.

Creating the Email field in object Jewel Customer

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Jewel Customer) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Email” and click Next.
4. Given the Field Label as “ Email”.
5. Field Name will be auto populated, and click on Next >> Next >> Save.

Creating the number field in Item object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Number” and click Next.
4. Given the Field Label as “ Purity” and length as “ 2 ”.
5. And save.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The top navigation bar includes a search bar and icons for various setup tools. The left sidebar lists navigation options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Item' and 'New Custom Field'. It shows 'Step 2 of 4: Enter the details'. The 'Field Label' is 'Purity', 'Length' is '2', and 'Decimal Places' is '0'. The 'Field Name' is auto-populated as 'Purity'. A note states: 'Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90"'. The 'Number of digits to the left of the decimal point' is 2, and the 'Number of digits to the right of the decimal point' is 0. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the top right of the form.

Creating Picklist Field in Item Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar>> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select Data type as “Picklist” and click Next.
4. Enter Field Label as “Item Type”.
5. In values select “Enter values(Gold,Silver), with each value separated by a new line" and enter values as shown below.
6. And save.

The screenshot shows the Salesforce Setup interface for creating a new custom field for the 'Item' object. The 'New Custom Field' wizard is displayed, and the user is at 'Step 2. Enter the details'. The 'Field Label' is 'Item Type'. The 'Values' section has the radio button 'Enter values, with each value separated by a new line' selected, and the text area contains 'Gold' and 'Silver' on separate lines. The 'Field Name' is 'Item_Type'. The 'Description' field is empty.

Creating Currency Field in Price Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Price) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select Data type as “Currency” and click Next
4. And save.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Setup icon, a search bar, and various utility icons. The main header indicates the path: SETUP > OBJECT MANAGER > Price. A left sidebar contains a menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Price' and contains a form for configuring a new field. The form includes fields for 'Field Label' (Gold price), 'Length' (8), 'Decimal Places' (0), 'Field Name' (Gold_price), 'Description', and 'Help Text'. A note states: 'Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90"'. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the top right.

Creating Formula Field(Cross Object) in Item Object

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select Data type as “Formula” and click Next.
4. Give Field Label and Field Name as “Gold Price” and select formula return type as “Currency” and click next.
5. And save.

The screenshot shows the Salesforce Setup interface for the 'Item' object. The top navigation bar is the same as the previous image. The main header indicates the path: SETUP > OBJECT MANAGER > Item. The left sidebar menu is the same, with 'Fields & Relationships' selected. The main content area is titled 'Item' and shows a 'New Custom Field' wizard. The current step is 'Step 2. Choose output type'. The 'Field Label' is 'Gold price' and the 'Field Name' is 'Gold_price'. There is a checkbox 'Auto add to custom report type' which is checked, with a note 'Add this field to existing custom report types that contain this entity'. Under 'Formula Return Type', 'None Selected' is chosen. A list of other return types is shown: Checkbox, Currency, Date, Date/Time, and Number. To the right of these options, instructions are provided for each type, such as 'Calculate a boolean value' with the example `{TODAY()} > CloseDate`, 'Calculate a dollar or other currency amount' with the example `{Gross Margin} * Amount - Cost_c`, 'Calculate a date' with the example `{Reminder Date} - CloseDate - 7`, 'Calculate a datetime' with the example `{Next = NOW()} + 1`, and 'Calculate a numeric value' with the example `{Fahrenheit} - 1.8 * Celsius_c + 32`. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the top right. A status bar at the bottom left says 'Waiting for smartbridge767-dev-ed.lightning.force.com...'.

Creating the Field Dependencies

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.

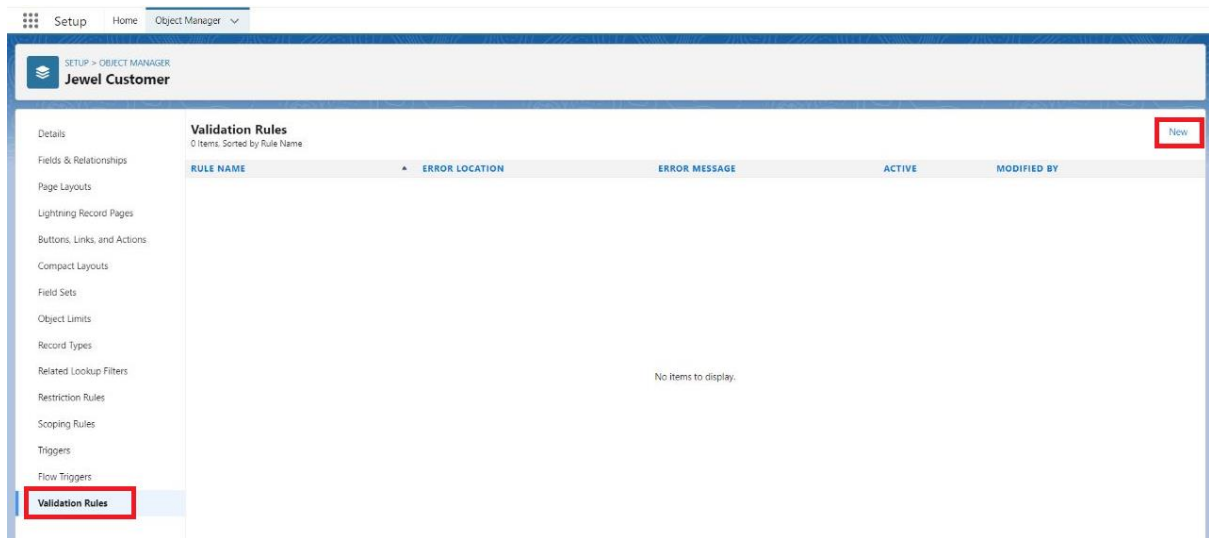
1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar >> click on the object.
2. Click on Fields & Relationships and click on the Priority field.
3. Search for Field Dependencies and click on New.
4. And save.

The screenshot shows the Salesforce Object Manager interface for the 'Item' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships (selected), 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, and Scoping Rules. The main content area is titled 'Field Information' and displays details for the 'Priority' field, including its API name 'Priority__c', data type 'Picklist', and various options like 'Required' and 'Default Value'. At the bottom of the page, the 'Field Dependencies' section is highlighted with a red box, and a red arrow points to the 'New' button next to it.

Creating the validation rule

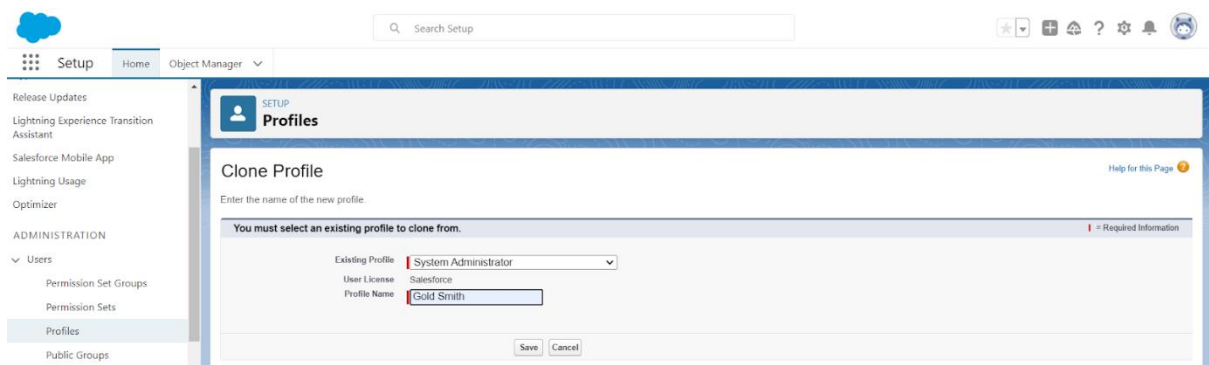
1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar>> click on the object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “Postal Code “.
4. Insert the Error Condition Formula as : -
AND(
OR(
LEN(Zip_Postal_code__c) <> 6,
NOT(REGEX(Zip_Postal_code__c, "^[0-9]{6}\$"))),
NOT(ISBLANK(Zip_Postal_code__c))

5. And save.



Gold Smith 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.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Jewel Customer, Item, Customer order , prices, billing.

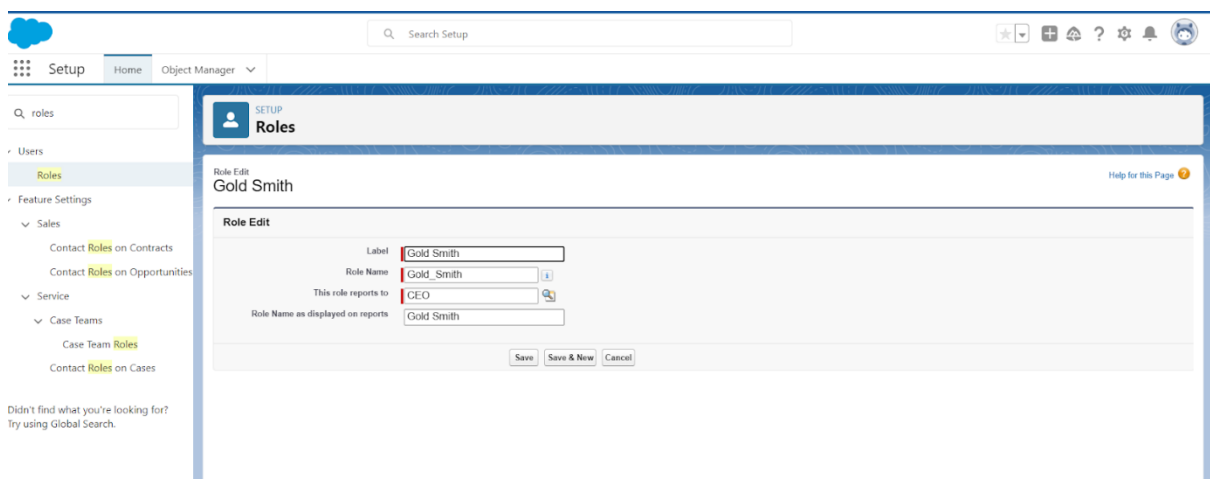


Worker Profile

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.

Creating Gold Smith Role

- Label = Gold smith
- Role name = gold_smith



The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Roles' is selected under 'Users'. The main content area displays the 'Role Edit' form for 'Gold Smith'. The form fields are as follows:

Role Edit	
Label	Gold Smith
Role Name	Gold_Smith
This role reports to	CEO
Role Name as displayed on reports	Gold Smith

At the bottom of the form, there are three buttons: 'Save', 'Save & New', and 'Cancel'.

Create User

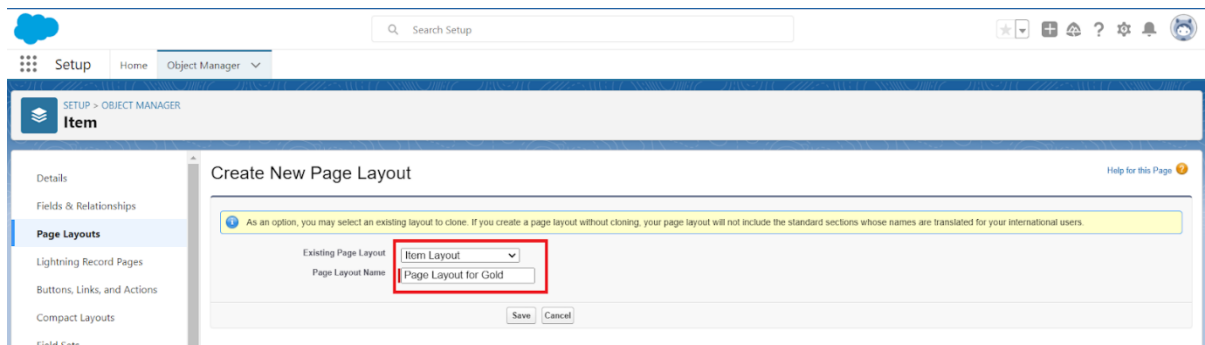
Go to setup >> type users in quick find box >> select users >> click New user.
Fill in the fields

1. First Name : Niklaus
 2. Last Name : Mikaelson
 3. Alias : Give a Alias Name
 4. Email id : Give your Personal Email id
 5. Username : Username should be in this form: text@text.text
 6. Nick Name : Give a Nickname
 7. Role : Gold Smith
 8. User licence : Salesforce
 9. Profiles : Gold Smith
- And save.

The screenshot shows the Salesforce 'User Edit' interface for a user named 'Niklaus Mikaelson'. The left sidebar contains navigation links for 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The main content area is titled 'User Edit: Niklaus Mikaelson' and includes a 'General information' section with fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. On the right side, there are three dropdown menus for 'Role', 'User License', and 'Profile', all of which are set to 'Gold Smith', 'Salesforce', and 'Gold Smith' respectively. These three dropdowns are highlighted with a red rectangular box. Below these dropdowns are several checkboxes for user roles and permissions, including 'Active', 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', and 'Data.com User Type'. At the bottom of the page, there are additional checkboxes for 'Data.com Monthly Addition Limit', 'Accessibility Mode (Classic Only)', 'High-Contrast Palette on Charts', 'Load Lightning Pages While Scrolling', 'Debug Mode', and 'Send Apex Warning Emails'.

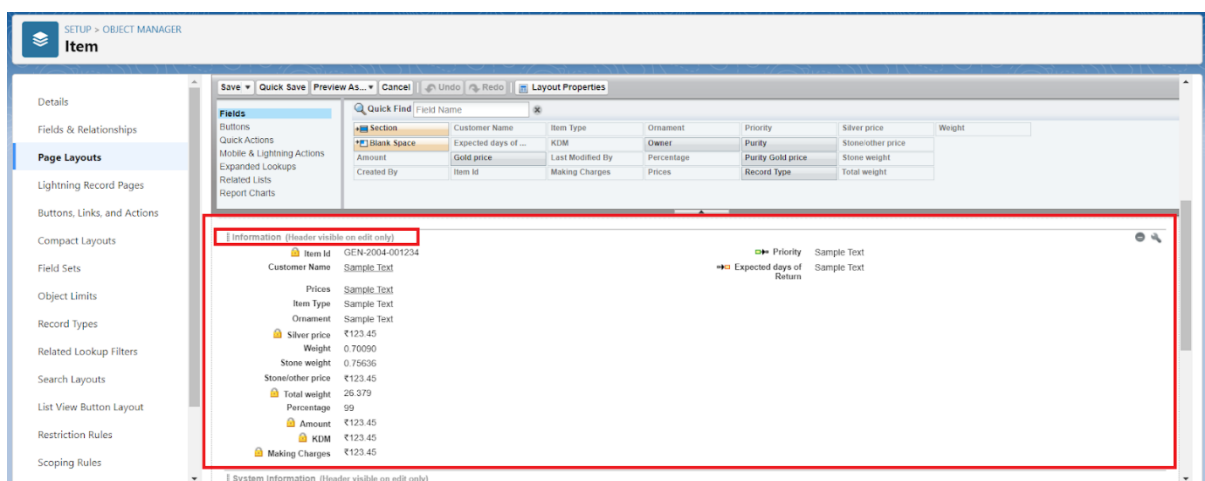
To Create a Gold Page layout

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. Give Page layout Name as “Page Layout for Gold” and click on Save and New
4. Arrange the field as shown in the Information Section ,remove fields which are related to Silver and click Ok
5. And save



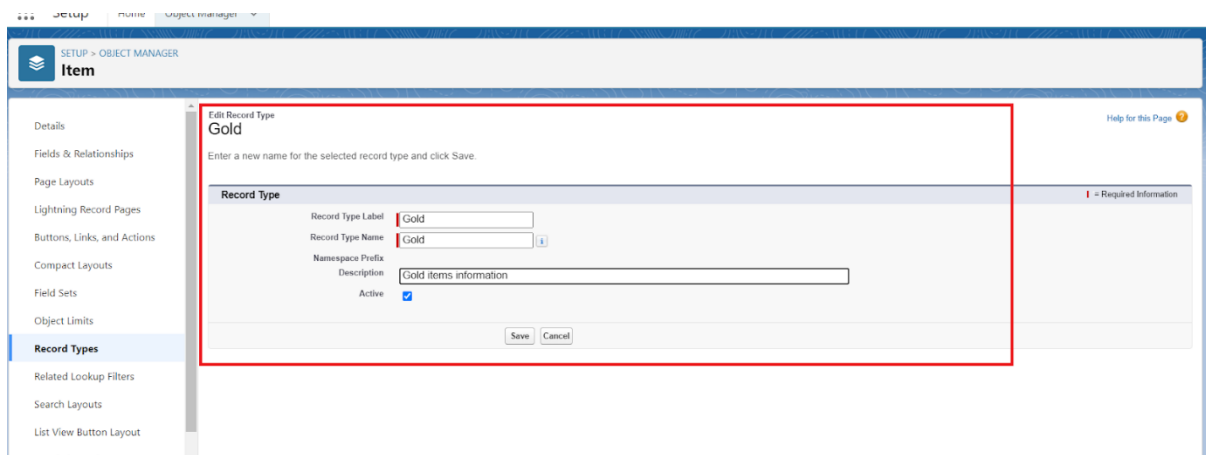
To Create a Silver Page layout

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. Give Page layout Name as “Page Layout for Silver” and click on Save.
4. Arrange the field as shown in the Information Section ,remove fields which are related to Gold and click Ok.



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



The screenshot shows the Salesforce Setup interface. On the left, a navigation menu lists various setup options, with 'Record Types' highlighted under the 'Object Manager' section. The main content area is titled 'Edit Record Type' for the 'Gold' record type. It includes a sub-header 'Record Type' and a prompt to 'Enter a new name for the selected record type and click Save.' The form contains several fields: 'Record Type Label' (Gold), 'Record Type Name' (Gold), 'Namespace Prefix' (empty), and 'Description' (Gold items information). There is also a checkbox for 'Active' which is checked. At the bottom of the form are 'Save' and 'Cancel' buttons. A red rectangle highlights the form area.

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.
- Click on Items object? Click on Edit ? Under Item: Record Type Assignments, enable Gold, Silver? Object permission check for read, edit and create.
- Click on Save.
- After saving the permission click on the Manage assignment
- Now click on the Add Assignment.
- Now select the users which you have created in user milestone, using Worker profile and click on Next? Assign? Done

SETUP
Permission Sets

Permission Set
Clone: Per to Worker Help for this Page ?

Enter a new label and description for the cloned permission set.

Save Cancel

Enter permission set information ! = Required Information

Label

API Name

Description

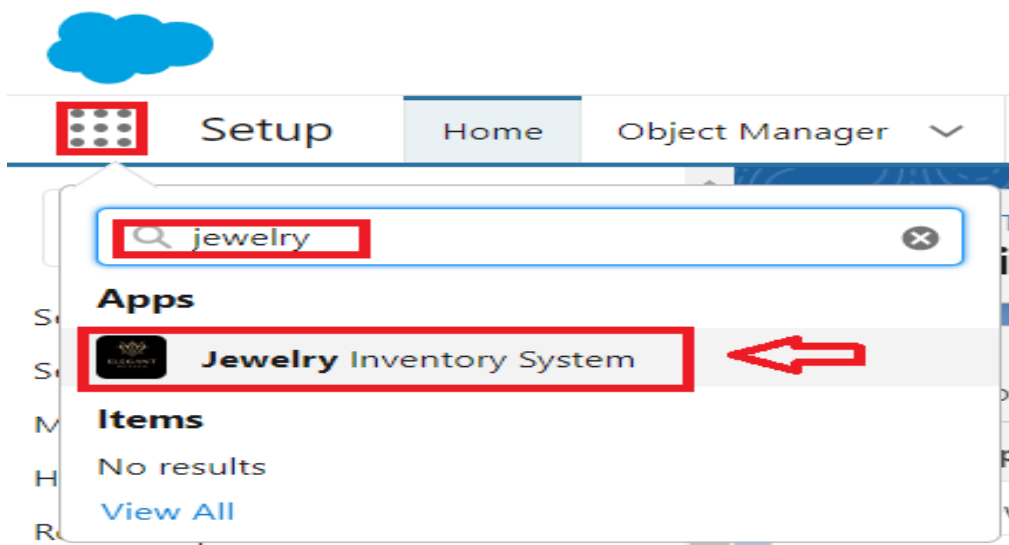
Session Activation Required ☐

License

Save Cancel

Create a Record (Jewel Customer)

1. Click on App Launcher on the left side of the screen.
2. Search Jewellery 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



View a Record (Jewel Customer)

1. Click on App Launcher on the left side of the screen.
2. Search Jewellery Inventory System & click on it.
3. Click on the Jewel Customer Tab.
4. Click on any record name. You can see the details of the Jewel Customer.

Delete a Record (Jewel Customer)

1. Click on App Launcher on the left side of the screen.
2. Search Jewellery Inventory System & click on it.
3. Click on the Jewel Customer Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete.

Create Report

Go to the app >> click on the reports tab

- Click New Report
- Select report type from category or from report type panel or from search panel? Click on start report.
- Customise the report.
Add fields from the left pane as shown below
- Save or run it

The screenshot shows the 'Reports' section of the Jewellery Inventory System. The top navigation bar has 'Reports' highlighted. The left sidebar shows a list of reports and folders, with 'Reports' highlighted. The main area displays a table of recent reports with columns for Folder, Created By, Created On, and Subscribed. The 'New Report' and 'New Folder' buttons are visible in the top right of the reports list.

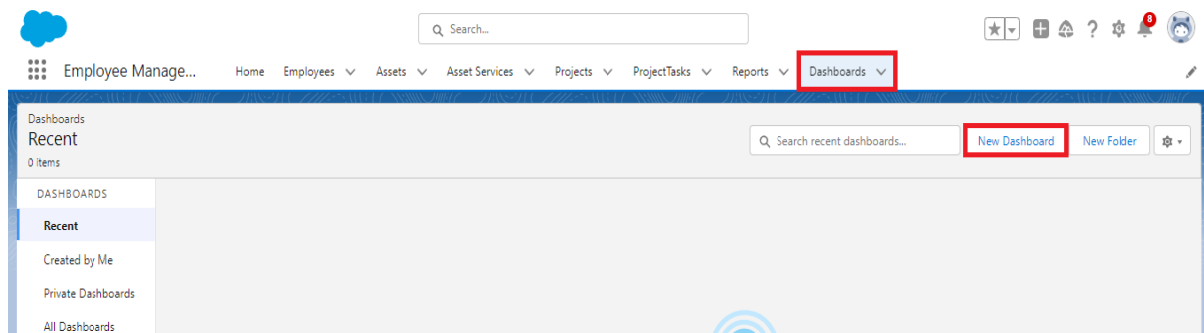
Folder	Created By	Created On	Subscribed
Private Reports	meghana katoju	7/19/2023, 4:34 AM	
Private Reports	meghana katoju	7/19/2023, 4:30 AM	
Private Reports	meghana katoju	7/19/2023, 4:27 AM	
DreamHouse Reports	meghana katoju	5/31/2022, 11:25 PM	
Private Reports	meghana katoju	7/12/2023, 8:45 PM	✓
Private Reports	meghana katoju	7/10/2023, 8:48 PM	
Private Reports	meghana katoju	7/12/2023, 12:03 AM	
Private Reports	meghana katoju	7/12/2023, 12:01 AM	
Private Reports	meghana katoju	7/11/2023, 11:49 PM	
Private Reports	meghana katoju	7/11/2023, 11:39 PM	
Private Reports	meghana katoju	6/20/2023, 11:19 PM	
Private Reports	meghana katoju	6/20/2023, 11:08 PM	

Reports

1. Create a report with report type: "Item with Billings".
2. Create a report with report type: "Billings with item and Customer order"

Create Dashboard

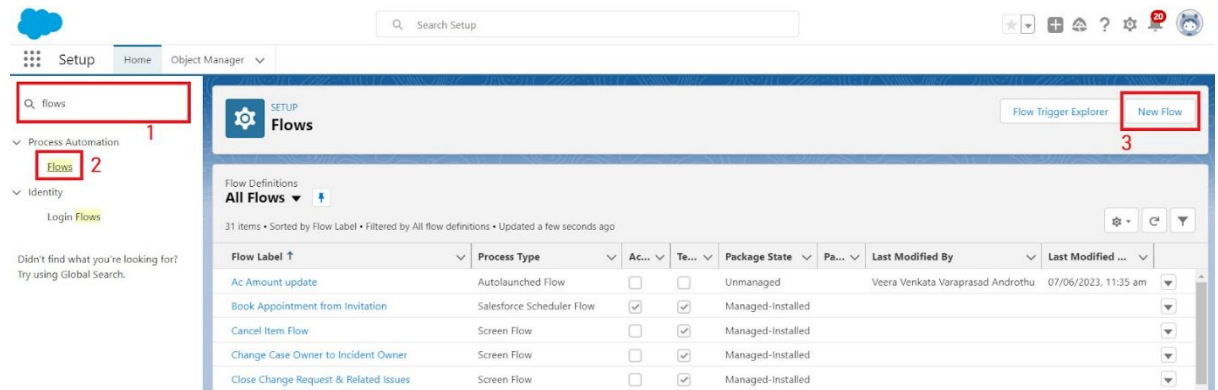
1. Go to the app >> click on the Dashboards tabs.
2. Give a Name and click on Create.
3. select a Report and click on select
4. Click Add then click on Save and then click on done.



Create a Flow

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow
2. select the Record-triggered flow and Click on Create
3. Select the Object as a "Billing" in the Drop down list.
4. Select the Trigger Flow when: "A record is Created or Updated".
5. Select the Optimise the flow for: "Actions and Related Records" and Click on Done
6. Now change the mode from Auto-layout to free-form.
7. Now select the manger option in the toolbox, click new resource.
8. Select the resource type as text template
9. Enter the API name as " Email body"
10. Change the view as Rich Text? View to Plain Text.
11. In the body field paste the syntax that is given below.
Hello
Customer Name: {! \$Record.Item__r.Customer_Name__Renamed}
Here are the details for the item you purchased with Jewellery Inventory System
Item Type: {! \$Record.Item__r.Item_Type__c}
Ornament: {! \$Record.Ornament__c}

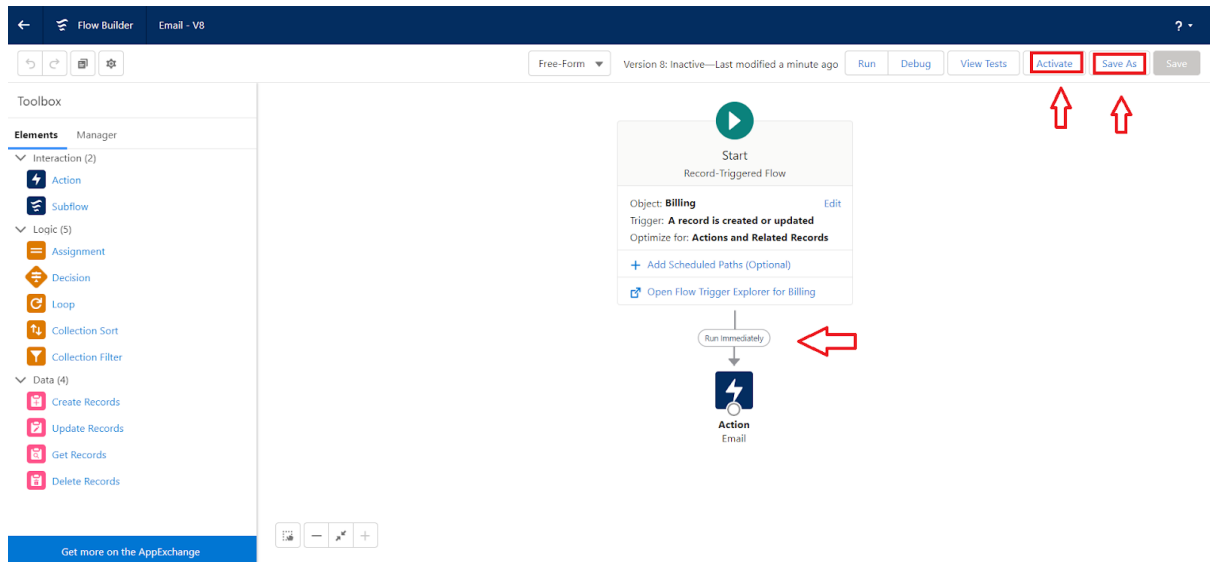
Weight: {!\$Record.Weight__c}grams
Amount: {!\$Record.Amount__c}



12. Click done.
13. Now click on elements, and drag the action element into the preview pane.
14. Their action bar will be opened in that search for “send email” and click on it.
15. Give the label name as “notice”
16. API name will be auto populated.
17. Enable the body in set input values for the selected action.
18. Select the text template that was created

The 'New Action' dialog is shown. The 'Action' dropdown is set to 'Send Email'. The 'Label' field contains 'notice' and the 'API Name' field also contains 'notice'. The 'Description' field is empty. Under 'Set Input Values for the Selected Action', the 'Body' input is set to {!Email_Body} and the 'Log Email on Send' toggle is turned on. The 'Done' button is highlighted.

19. Include Recipient Address list, select the email form the record.
(`{! $Record.Item_r.Customer_Namer.Email_c}`)
20. Include the subject as "Welcome to Jewellery Inventory System".
21. Click done.
22. Now drag the path from the start to the action element.
23. Click on save. Given the Flow label, Flow Api name will be auto populated.
24. And click save, and click on activate



Thank you