



9520: P.S.R.R COLLEGE OF ENGINEERING

ARTIFICIAL INTELLIGENCE & DATA SCIENCE

Completed the project “CRM Application for Jewel Management”

TECHNOLOGY NAME: Salesforce Developer

SUBMITTED BY,

NM TEAM ID: NM2025TMID05575

TEAM LEADER: BALASUBRAMANIAN M(p.moorthy1969@gmail.com)

TEAM MEMBER: DAVID SALAMON M(davidcathrin471@gmail.com)

TEAM MEMBER: HARIHARAN J(rjhariharan2004@gmail.com)

TEAM MEMBER: VINAY PRASATH R(vinayprasath7@gmail.com)

1. INTRODUCTION

1.1 Project Overview:

This project involves the development of a CRM-based Jewel Management System using Salesforce. It streamlines operations like inventory tracking, price updates, billing, and customer management for a jewellery business. The project leverages Salesforce Lightning Platform to design custom objects, automate processes using Flows, and generate actionable insights via dashboards and reports.

1.2 Purpose:

The purpose is to replace manual processes with an automated, cloud-based Salesforce CRM that enables real-time stock updates, dynamic pricing, customer billing, and order tracking. The system enhances customer experience, operational accuracy, and business decision-making.

The purpose of this project is to design and implement a Salesforce-based CRM solution specifically for jewel businesses to:

- Centralize customer information and communication.
- Track and manage jewellery inventory (gold and silver).
- Enable personalized marketing and offers.
- Facilitate efficient order processing and billing.
- Improve customer retention through engagement automation.
- Generate detailed reports on sales, trends, and staff performance.

2. IDEATION PHASE

2.1 Problem Statement:

Traditional jewellery shops face problems like manual stock maintenance, lack of customer records, and inefficiencies in pricing and billing. There's also no integrated view of customer interactions. This leads to errors, delayed decision-making, and customer dissatisfaction.

Many small to mid-sized jewellery retailers struggle with managing customer relationships, tracking sales, handling special orders, and maintaining inventory. Current manual systems or generic software often fall short of addressing the industry's unique needs.

2.2 Empathy Map Canvas:

Think & Feel

- “Are we missing out on leads because we’re not following up?”
- “I need to know who our high-value customers are.”

Hear

- “The customer wasn’t happy with the delay in their custom order.”
- “Can we send reminders for anniversaries and birthdays?”

See

- Registers with scribbled orders.
- Multiple Excel sheets for billing and inventory.

Say & Do

- “Call them about the pendant order tomorrow.”
- “Print out last year’s top customers list.”

Pain

- Losing customers due to lack of follow-up.
- No real-time inventory tracking.

Gain

- Higher customer satisfaction.
- More repeat purchases via automation.

2.3 Brainstorming:

The brainstorming phase focused on collecting diverse ideas from stakeholders—including jewel store owners, sales representatives, developers, and end-users—to define potential solutions and functionalities required in the CRM application. This collaborative ideation process aimed to understand the operational bottlenecks in the jewelry business and how Salesforce's cloud ecosystem could streamline them.

Ideas collected during brainstorming:

- Use of custom objects for Items, Billing, Orders, and Customers.
- Automate stock management with flows.
- Dashboard for daily performance insights.
- Notifications for low inventory.
- Implement record-triggered and scheduled flows.
- Introduce validation rules to prevent data inconsistencies.
- Plan separate dashboards for different roles (sales, inventory, admin).

3. Requirement Analysis:

3.1 Customer Journey Map:

The customer journey map outlines the stages a customer experiences, from the first interaction to post-purchase engagement. It helps identify gaps and opportunities where the CRM can automate and enhance customer experience.

Awareness Stage

- Customer browses website or social media.
- CRM captures leads using Web-to-Lead forms.

Consideration Stage

- Customer visits the store or requests a catalog.
- Salesforce auto-assigns a sales representative.
- Email/SMS with product recommendations is triggered.

Purchase Stage

- Customer places an order (in-store or online).
- CRM logs order and creates a sales opportunity.
- Invoice is generated using built-in templates.

Delivery Stage

- Customer receives order.
- CRM sends order tracking notifications and confirmations.

Post-Purchase Stage

- Customer receives feedback form.
- Loyalty points are updated.
- Follow-up reminders for anniversaries, birthdays, etc.

3.2 Solution Requirements:

Defines both the functional (what the system should do) and non-functional (how the system performs) needs to fulfill business goals.

- Real-time item stock tracking
- Dynamic pricing management
- Billing with automated tax calculations
- Comprehensive dashboards and reports
- Data security and accessibility
- Integration with communication tools (email/SMS)
- Record ownership for audit and traceability

3.3 Data Flow Diagrams:

DFD illustrates how data moves between the system's components. This helps developers visualize dependencies and database interaction points.

Main Entities & Data Flow Points:

1. Customer submits a product inquiry.

2. Data flows to CRM Interface (Form or App).
3. CRM creates or updates Customer Object.
4. CRM logs sale and updates Sales Record.
5. Inventory count is adjusted in the Inventory Object.
6. Reports are updated to reflect real-time sales and stock.

3.4 Technology Stack:

Defines the tools and platforms used to develop, deploy, and manage the CRM system in Salesforce.

- Platform: Salesforce Lightning Experience.
- Logic: Apex Triggers, Validation Rules, Flow Builder.
- UI: Lightning Tabs, Pages, Reports, Dashboards.
- Database: Salesforce Standard & Custom Objects.
- Integration: Email Templates, Scheduled Flows, Approval Processes.

4. PROJECT DESIGN

4.1 Problem Solution Fit:

Problem: Manual processes and lack of centralized tracking

Solution: Salesforce CRM system automating every major jewelry workflow

4.2 Proposed Solution:

Five major custom objects: Item_c, Price_c, Jewel_Customer_c, Customer_Order_c, Billing_c

- Lightning app with navigation tabs
- Automated flows for inventory, billing, and notifications
- Dashboards visualizing sales, stock, and revenue performance

4.3: Solution Architecture:

Objects and Relationships:

- Jewel_Customer_c ↔ Customer_Order_c ↔ Billing_c ↔ Item_c ↔ Price_c
- Lookup and Master-Detail fields used to link records
- Formula fields for auto-calculations (e.g., total billing amount)
- Validation rules for quantity and price limits
- Record Types to distinguish Gold, Silver, and Diamond workflows

5. PROJECT PLANNING AND SCHEDULING

5.1 Project Planning:

The planning and scheduling phase involves defining the project's timeline, scope, team responsibilities, tools, and milestones. It ensures the project stays on track and aligns with business goals while delivering the CRM application in an efficient, scalable, and phased manner.

- Week 1: Requirement gathering, Use Case and ER Diagrams
- Week 2: Custom object creation, Page Layouts and Tab Setup
- Week 3: Flows and Automation Setup, Validation Rules
- Week 4: Reports and Dashboards, Testing and Review
- Week 5: Final Deployment, Documentation and User Training

6. PROJECT DEVELOPMENT PHASE - SALESFORCE GUIDED PROJECT

The development phase is the backbone of the CRM application, where core functionalities were implemented using Salesforce's declarative tools and programmatic capabilities. This phase was conducted in iterative sprints, following Agile methodology, and broken into several key activities.

6.1 Developer Environment Setup:

- Create Salesforce Developer Org via developer.salesforce.com/signup

Fill the required information, verify email, set password, and access Salesforce Setup.

Salesforce Developer Project | Inbox (4,253) - p.moorthy10 | Student | stucor app - Search | STUCOR - Academic Platform | Developer Edition with Agentforce | +

<https://www.salesforce.com/form/developer-signup/?d=pb>

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First name: Davidsalomon | Last name: M

Job title: Developer | Work email: davidcathrin471@gmail.com

Company: PSRR College of Engg | Country/Region: India

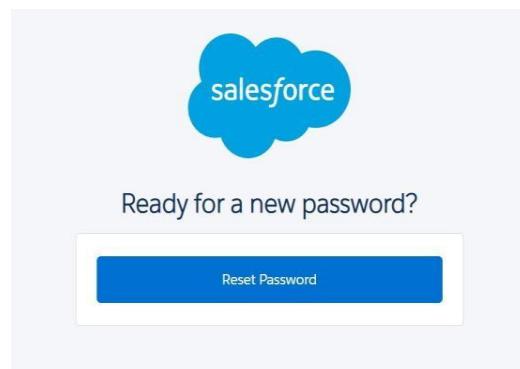
Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

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Change Your Password

Enter a new password for **streetcause178@sb.com**.
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password

.....Good

* Confirm New Password

* Security Question

▼In what city were you born?

* Answer

*=required

Change Password

Password was last changed on 6/20/2025, 3:59 AM.

6.2 Custom Object Creation:

We create five main custom objects for Jewel Customer, Item, Customer Order, Price, Billing.

1. Jewel Customer

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected in the top navigation bar. The main title is 'Jewel Customer'. On the left, a sidebar lists various configuration options: 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, and List View Button Layout. The 'Details' tab is selected. The main content area displays the 'Details' section for the 'Jewel Customer' object. It includes fields for Description, API Name (Jewel_Customer__c), Singular Label (Jewel Customer), Plural Label (Jewel Customers), Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and a link to the Standard salesforce.com Help Window.

2. Item

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected in the top navigation bar. The main title is 'Item'. On the left, a sidebar lists various configuration options: 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, and List View Button Layout. The 'Details' tab is selected. The main content area displays the 'Details' section for the 'Item' object. It includes fields for Description, API Name (Item__c), Singular Label (Item), Plural Label (Items), Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and a link to the Standard salesforce.com Help Window.

3. Customer Order

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The main title is 'Customer Order'. On the left, a sidebar lists various configuration options: 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, and List View Button Layout. The 'Details' tab is selected. The main content area displays the following details for the 'Customer Order' object:

Description	
API Name	Customer_Order_c
Custom	<input checked="" type="checkbox"/>
Singular Label	Customer Order
Plural Label	Customer Orders
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the top right, there are 'Edit' and 'Delete' buttons.

4. Price

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The main title is 'Price'. The left sidebar is identical to the previous screenshot, listing the same configuration options. The 'Details' tab is selected. The main content area displays the following details for the 'Price' object:

Description	
API Name	Price_c
Custom	<input checked="" type="checkbox"/>
Singular Label	Price
Plural Label	Prices
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the top right, there are 'Edit' and 'Delete' buttons.

5. Billing

The screenshot shows the Salesforce Object Manager interface for the 'Billing' object. The left sidebar lists various configuration tabs: 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, and List View Button Layout. The main 'Details' tab is selected. The right pane displays the object's details, including its API name ('Billing__c'), which is marked as 'Custom'. Other settings shown include Singular Label ('Billing'), Plural Label ('Billings'), Enable Reports (checked), Track Activities, Track Field History, Deployment Status ('Deployed'), Help Settings, and Standard salesforce.com Help Window.

6.3 Creation of Tabs

We create five main custom tabs for Jewel Customer, Item, Customer Order, Price, Billing.

1. Jewel Customer

The screenshot shows the 'Tabs' setup page for the 'Jewel Customers' object. The left sidebar has a search bar and navigation links for 'User Interface' (Rename Tabs and Labels, Tabs). A message at the bottom says 'Didn't find what you're looking for? Try using Global Search.' The main area shows a 'Custom Tab Definition Detail' for the 'Jewel Customers' tab. The tab is defined with the following details:

Tab Label	Jewel Customers	Tab Style	Airplane
Object	Jewel Customer	Splash Page Custom Link	
Description			
Created By	Bobbadi Harshitha Team	Modified By	Bobbadi Harshitha Team
	6/22/2025, 8:13 AM		6/22/2025, 8:13 AM

2. Item

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.

Custom Object Tab Items

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Tab Label	Items	Edit	Delete
Object	B2B		
Description			
Created By	Bobbadi Harshitha Team 6/22/2025, 8:17 AM		
Modified By	Bobbadi Harshitha Team 6/22/2025, 8:17 AM		

Tab Style: Alarm clock

Splash Page Custom Link

Help for this Page

3. Customer Order

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.

Custom Object Tab Customer Orders

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Tab Label	Customer Orders	Edit	Delete
Object	Customer Order		
Description			
Created By	Bobbadi Harshitha Team 6/22/2025, 8:19 AM		
Modified By	Bobbadi Harshitha Team 6/22/2025, 8:19 AM		

Tab Style: Bell

Splash Page Custom Link

Help for this Page

4. Price

The screenshot shows the Salesforce Setup interface. In the top left, there's a blue cloud icon followed by 'Setup', 'Home', and 'Object Manager'. A search bar says 'Search Setup' with a magnifying glass icon. On the right are various icons for help, notifications, and user info. The main area has a sidebar with 'User Interface' expanded, showing 'Rename Tabs and Labels' and 'Tabs' selected. A search bar at the top of the sidebar says 'Q tabs'. The main content area has a title 'SETUP Tabs' with a gear icon. Below it, 'Custom Object Tab Prices' is shown. A message says 'Below is the information for the custom tab. Click Edit to change the custom tab.' A 'Custom Tab Definition Detail' table is displayed:

Tab Label	Prices	Edit	Delete
Object	Price	Tab Style: Fan	
Description		Splash Page Custom Link	
Created By	Bobbadli Harshitha Team 6/22/2025, 8:20 AM	Modified By	Bobbadli Harshitha Team 6/22/2025, 8:20 AM

5. Billing

This screenshot is similar to the previous one but shows the creation of a new custom tab. The sidebar and main content area are identical, except for the tab name. The 'Custom Tab Definition Detail' table shows:

Tab Label	Billings	Edit	Delete
Object	Billing	Tab Style: Boat	
Description		Splash Page Custom Link	
Created By	Bobbadli Harshitha Team 6/22/2025, 8:22 AM	Modified By	Bobbadli Harshitha Team 6/22/2025, 8:22 AM

So we get the required all custom tabs as below

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 web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Action	Label	Tab Style	Description
Edit Del	Billings	Boat	
Edit Del	Customer Orders	Bell	
Edit Del	Items	Alarm clock	
Edit Del	Jewel Customers	Airplane	
Edit Del	Prices	Fan	

Web Tabs

New | What Is This?

No Web Tabs have been defined

6.4 Creation of Lightning App

App Name: Jewelry Inventory System

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

Navigation Rules

User Profiles

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name

*Developer Name

Description

App Branding

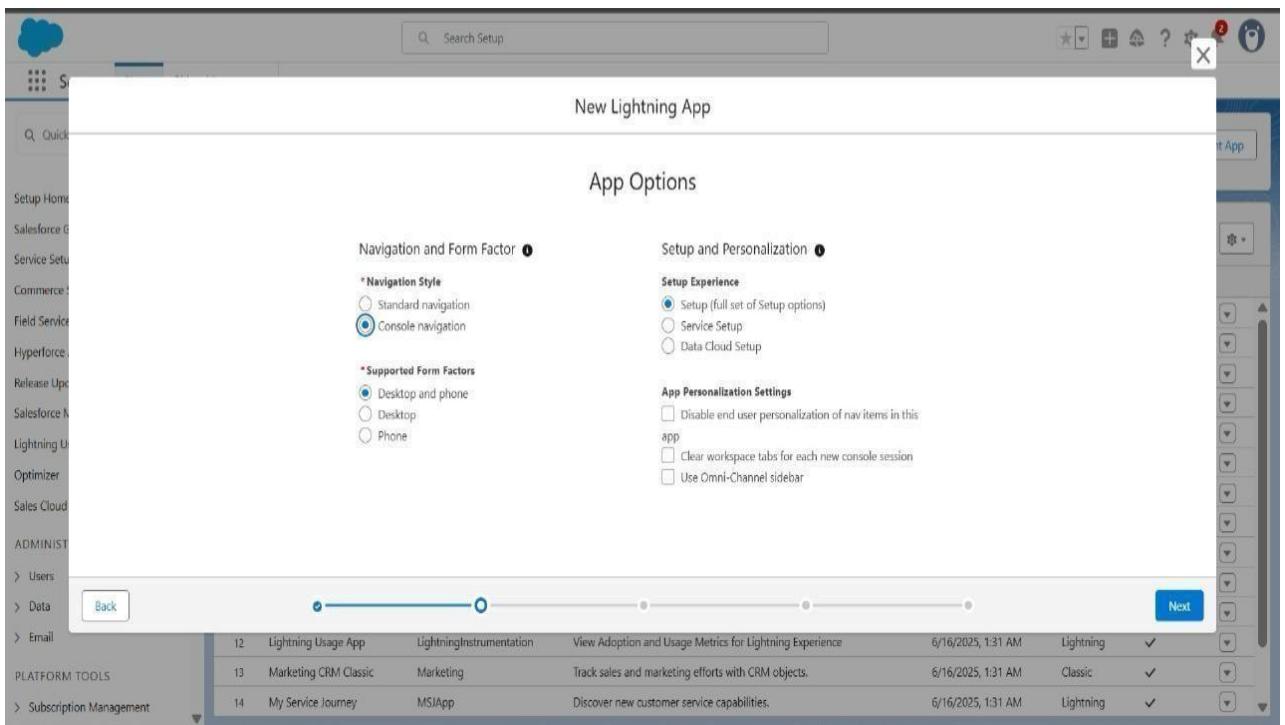
Image Primary Color Hex Value

Org Theme Options

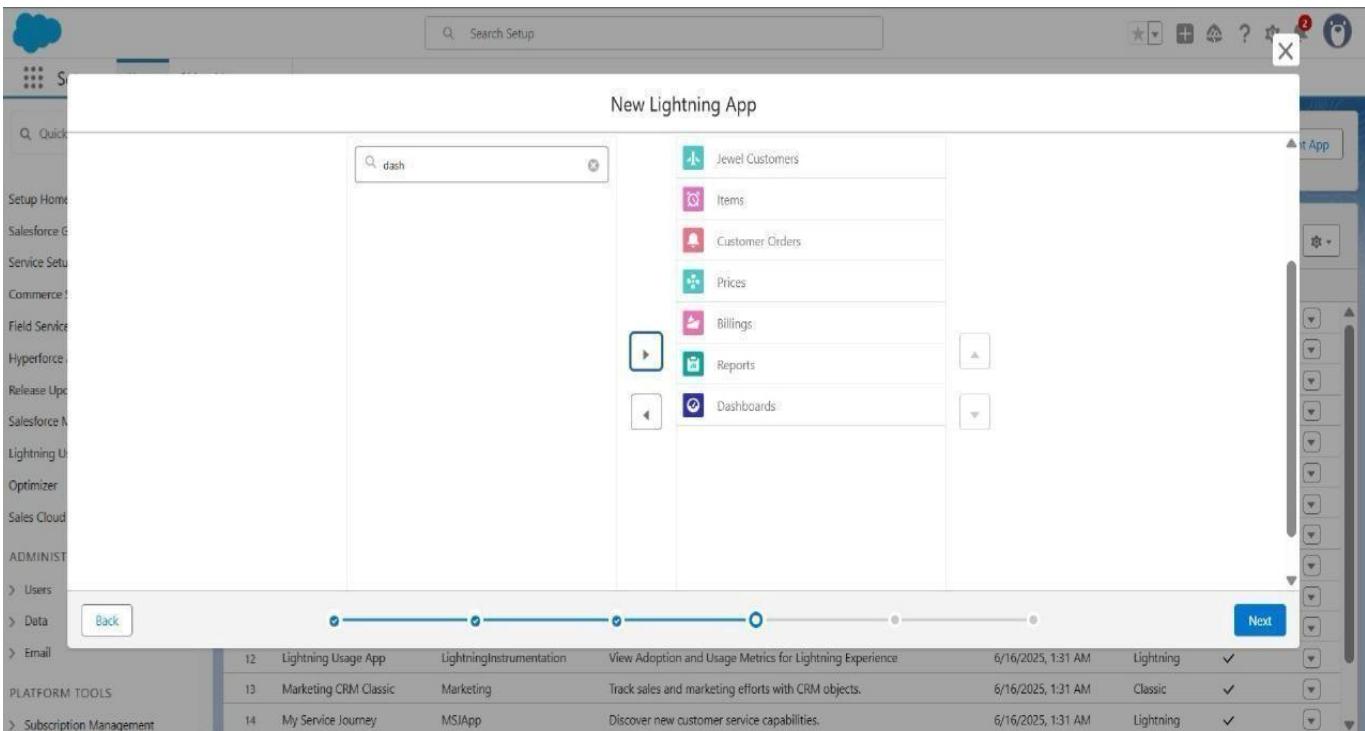
Use the app's image and color instead of the org's custom theme.

App Launcher Preview

jewelry Inventory System
Elevate your look with elegance



Navigation Items



6.5 Creation of Fields

1. Creating lookup relationship

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

The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar lists various object settings like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "Customer Order New Relationship". Step 3 of 6 is displayed, asking for the label and name of the lookup field. The "Field Label" and "Field Name" both contain "Customer". The "Child Relationship Name" is set to "Customer_Orders". Under "What to do if the lookup record is deleted?", the "Clear the value of this field. You can't choose this option if you make this field required." radio button is selected. Under "Auto add to custom report type", the "Add this field to existing custom report types that contain this entity" checkbox is checked. The "Lookup Filter" section is partially visible at the bottom.

The screenshot shows the continuation of the setup process. Step 6 of 6 is displayed, titled "Step 6. Add custom related lists". It shows the configuration for a related list named "Customer Orders" associated with the "Customer" field. The "Page Layouts" section is expanded, listing "Jewel Customer Layout" as the page layout to include this field. Other options like "Append related list to users' existing personal customizations" are also present. The "Save" and "Cancel" buttons are visible at the bottom right.

2. Creating a Master-Detail Relationship

Creating Master-Detail Relationship between Item & Customer Order Object.

The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar is titled "Customer Order" and lists various setup options under "Fields & Relationships". The main area is titled "Customer Order New Relationship" and "Step 5. Add reference field to Page Layouts". It shows a field configuration for "Item" (Master-Detail) with a description. Below it, a list of page layouts includes "Customer Order Layout" with a checked checkbox. Navigation buttons at the bottom right include "Previous", "Next", and "Cancel".

The screenshot shows the Salesforce Setup interface for creating a new relationship, continuing from Step 5. The left sidebar is titled "Customer Order" and lists various setup options under "Fields & Relationships". The main area is titled "Customer Order New Relationship" and "Step 6 of 6". It shows a field configuration for "Item" (Master-Detail) with a description. Below it, a section for "Related List Label" has "Customer Orders" entered. A note says "Specify the title that the related list will have in all of the layouts associated with the parent." Below this, a list of page layouts includes "Item Layout" with a checked checkbox. There is also a checked checkbox for "Append related list to users' existing personal customizations". Navigation buttons at the bottom right include "Previous", "Save & New", "Save", and "Cancel".

3. Creating Text Field in Jewel Customer Object

Setup Home Object Manager

SETUP > OBJECT MANAGER
Jewel Customer

New Custom Field

Step 2 of 4

Help for this Page

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
- Scoping Rules

Field Label: City

Length: 20

Field Name: City

Description:

Help Text:

Required: Always require a value in this field in order to save a record

Unique: Do not allow duplicate values

External ID: Set the field as the unique record identifier from an external system

Auto add to custom report type: Add this field to existing custom report types that contain this entity

Previous Next Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER
Jewel Customer

New Custom Field

Step 4 of 4

Help for this Page

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
- Scoping Rules

Field Label: City

Data Type: Text

Field Name: City

Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

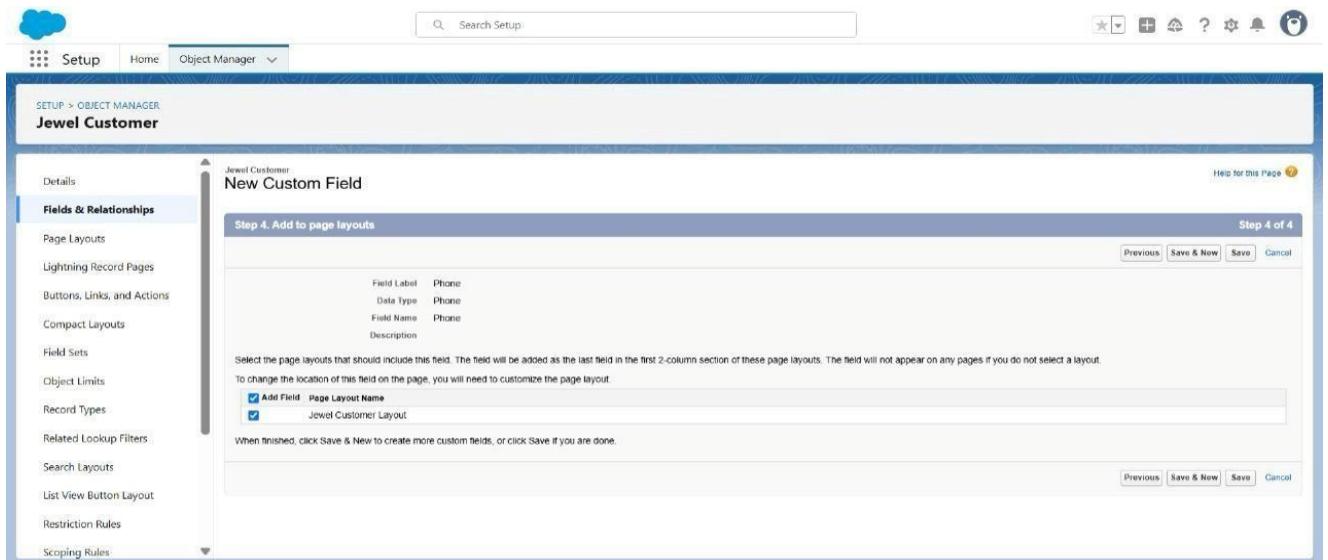
To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 Jewel Customer Layout

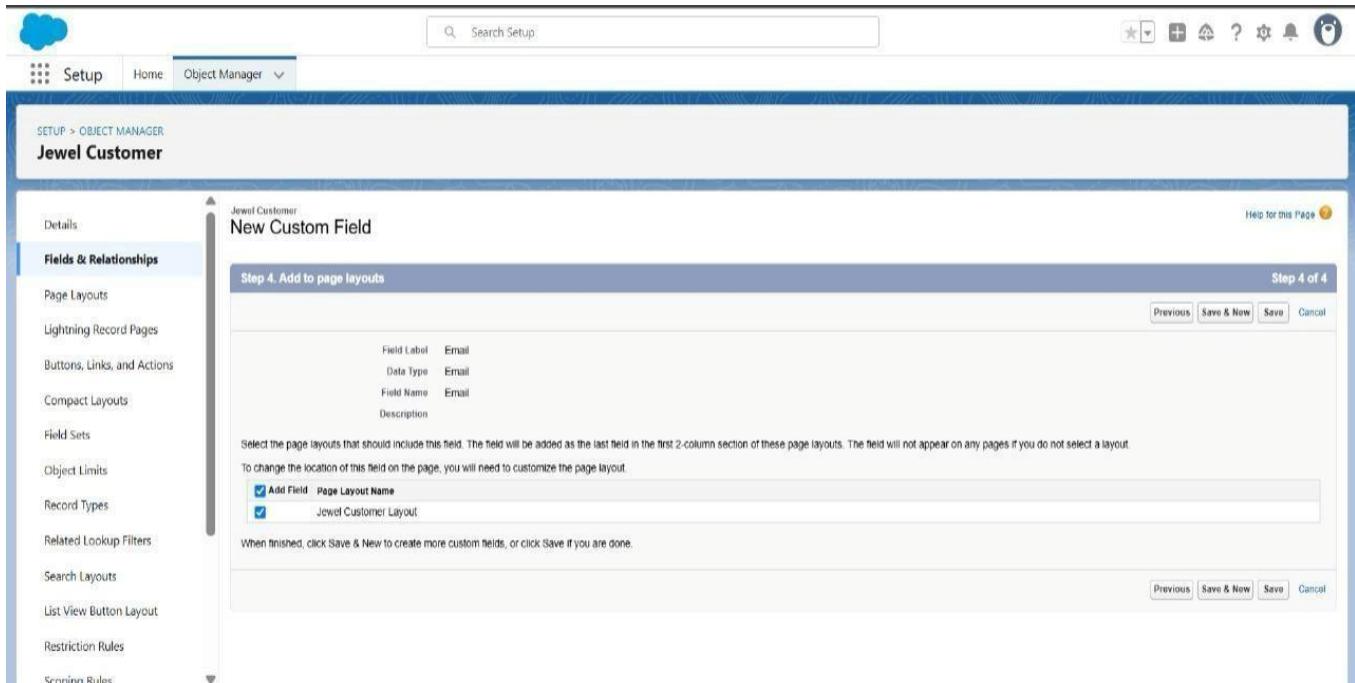
When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

4. Creating the Phone field in object Jewel Customer



5. Creating the Email field in object Jewel Customer



6. Creating the number field in Item object

Setup > Object Manager

Item

New Custom Field

Step 4. Add to page layouts

Field Label: Purity
Data Type: Number
Field Name: Purity
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 Item Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Help for this Page

7. Creating Picklist Field in Item Object

Setup > Object Manager

Item

New Custom Field

Step 4. Add to page layouts

Field Label: Item Type
Data Type: Picklist
Field Name: Item_Type
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 Item Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Help for this Page

8. Creating Currency Field in Price Object

SETUP > OBJECT MANAGER
Price

Fields & Relationships

Field Label: Gold Price
Data Type: Currency
Field Name: Gold_Price
Description:

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

9. Creating Formula Field(Cross Object) in Item Object

SETUP > OBJECT MANAGER
Item

Fields & Relationships

Simple Formula: Gross Margin = Amount - Cost__c / 10

Advanced Formula:

Insert Field: Insert Operator:

Functions: All Function Categories

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A new custom field is being created for the 'Item' object. The field is named 'Gold Price', has a formula data type, and is indexed. It is being added to the 'Page Layouts' section. The 'Step 5 of 5' indicates the final step in the process.

10. Creating Remaining Fields in Objects

Creating remaining fields in the objects

1.Jewel Customer : State, Street, Country, Zip/Postal code

The screenshot shows the 'Fields & Relationships' list for the 'Jewel Customer' object. The table displays various fields such as City, Country, Created By, Customer Name, Email, Last Modified By, Owner, and Phone, along with their respective field labels, names, data types, controlling fields, and indexing status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Country	Country__c	Text(10)		
Created By	CreatedBy	Lookup(User)		
Customer Name	Name	Text(80)		✓
Email	Email__c	Email		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		

2.Price : Silver Price

The screenshot shows the Salesforce Setup interface with the Object Manager selected. Under the Price object, the Fields & Relationships section is displayed. The table lists six fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Gold Price	Gold_Price__c	Currency(8, 5)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
Price Id	Name	Auto Number		✓
Silver Price	Silver_Price__c	Currency(8, 5)		

3. Item : Field Label-Customer Name, Ornament, Weight, Stone Weight, Percentage, Stone/Other Price, Expected Days of Return, Priority, Silver Price, Purity Gold Price, Total weights, Amount, KDM, Making Charges.

The screenshot shows the Salesforce Setup interface with the Object Manager selected. Under the Item object, the Fields & Relationships section is displayed. The table lists ten fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
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 Id	Name	Auto Number		✓
Item Type	Item_Type__c	Picklist		
KDM	KDM__c	Formula (Currency)		

4. Customer Order: Order Status

The screenshot shows the Salesforce Object Manager for the 'Customer Order' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Fields & Relationships' and displays six fields:

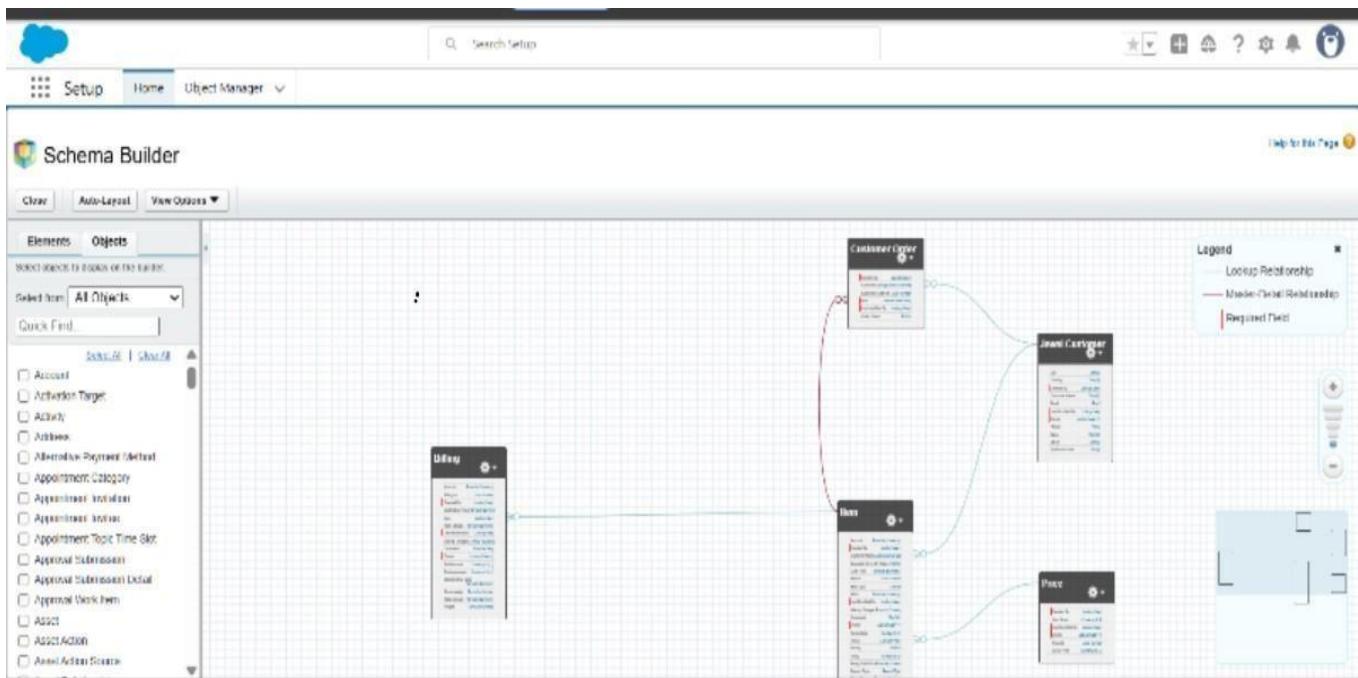
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer_c	Lookup(Jewel Customer)		✓
Customer Order Id	Name	Auto Number		✓
Item	Item_c	Master-Detail(Item)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Order Status	Order_Status_c	Picklist		

5. Billing: Field Label-Item, Ornament, Stone Weight, Weight, Amount, Gold/Silver Price, KDM Charge, Making Charges,Stone/Other Price, Total Amount.

The screenshot shows the Salesforce Object Manager for the 'Billing' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Fields & Relationships' and displays 16 fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Billing Id	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Gold/Silver Price	Gold_Silver_Price_c	Formula (Currency)		
Item	Item_c	Lookup(Item)		✓
KDM Charge	KDM_Charge_c	Formula (Currency)		
Last Modified By	LastModifiedById	Lookup(User)		
Making Charges	Making_Charges_c	Formula (Currency)		

11. Creation of Schema Builder



12. Creation of Field Dependencies

The screenshot shows the 'Item Field Dependencies' page within the Object Manager. The page title is 'Item Field Dependencies' and it includes a link to 'Back to Custom Object: Item'. A note states: 'This page allows you to define dependencies between fields (e.g., dependent picklists).'. The main content is a table titled 'Field Dependencies' with a 'New' button. The table has columns: Action, Controlling Field, Dependent Field, and Modified By. One row is present: 'Edit | Del' under Action, 'Priority' under Controlling Field, 'Expected Days Of Return' under Dependent Field, and 'Bobbadi Harshitha Team, 6/23/2025, 6:33 AM' under Modified By.

Action	Controlling Field	Dependent Field	Modified By
Edit Del	Priority	Expected Days Of Return	Bobbadi Harshitha Team, 6/23/2025, 6:33 AM

13. Creation of Validation Rules

Jewel Customer Validation Rule

Validation Rule Detail

Rule Name: Postal_Code
Error Condition Formula: AND(
OR(
LEN(zip_Postal_code__c) <= 6,
NOT(REGEX(zip_Postal_code__c, "[0-9]{6}\$"))
),
NOT(ISBLANK(zip_Postal_code__c))
)
Error Message: Must contain 6 digits
Description:
Created By: Bobbadi Harshitha Team, 6/23/2025, 6:58 AM
Modified By: Bobbadi Harshitha Team, 6/23/2025, 6:58 AM
Error Location: Zip/Postal code

Jewel Customer Validation Rule

Validation Rule Detail

Rule Name: ValidationRule_For_JewelCustomerObject
Error Condition Formula: OR(ISBLANK(City__c), ISBLANK(Country__c), ISBLANK(Phone__c), ISBLANK(State__c), ISBLANK(Street__c))
Error Message: Please fill required fields
Description:
Created By: Bobbadi Harshitha Team, 6/23/2025, 7:00 AM
Modified By: Bobbadi Harshitha Team, 6/23/2025, 7:00 AM
Error Location: Top of Page

6.6 Creation of Profiles

We create the goldsmith profile and the worker profile

The screenshot shows the Salesforce Setup interface with the following details:

Profile Detail

Name	Worker Profile	User License	Salesforce Platform	Custom Profile	✓	
Description						
Created By	Bobbadil Harshitha Team	6/23/2025, 7:31 AM		Modified By	Bobbadil Harshitha Team	6/24/2025, 10:42 AM

Page Layouts

Standard Object Layouts	Global	Lead
Global Layout [View Assignment]		Lead Layout [View Assignment]
Email Application Not Assigned [View Assignment]		Location Location Layout [View Assignment]
Home Page Layout Home Page Default [View Assignment]		Location Group Location Group Layout [View Assignment]
Account Account Layout [View Assignment]		Location Group Assignment Location Group Assignment Layout [View Assignment]

6.7 Creation of Roles

The screenshot shows the Salesforce Setup interface with the following details:

Roles

- Ideal Institute of Technology**
 - CEO** Edit | Del | Assign
 - CFO** Edit | Del | Assign
 - COO** Edit | Del | Assign
 - Gold Smith** Edit | Del | Assign
 - Worker** Edit | Del | Assign
 - SVP, Customer Service & Support** Edit | Del | Assign
 - Customer Support, International** Edit | Del | Assign
 - Customer Support, North America** Edit | Del | Assign

6.8 Creation of Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Pyment	Chatter	chatty_0000000000000000@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	ERIC_OrgFarm	ERIC	eric.1102037af52@orgfarm.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Mikael_Kol	Mikael	mikael@gmail.com	Worker	<input checked="" type="checkbox"/>	Worker Profile
<input type="checkbox"/>	Mikaelson_Niklaus	Nikson	nikson@gmail.com	Gold Smith	<input checked="" type="checkbox"/>	Gold Smith
<input type="checkbox"/>	Team_Bobbad_Harsitha	bob	bobbadharsitha974@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User_Integration	Integ	integration@00odpx000005ynguao.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00odpx000005ynguao.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

6.9 Creation of Page Layouts

We create the page layouts for gold and silver items

Section	Customer Name	Item Type	Ornament	Priority	Silver Price	Weight
Blank Space	Expected Days Of ...	KDM	Owner	Purity	Stone/Other Price	
Amount	Gold Price	Last Modified By	Percentage	Purity Gold Price	Stone Weight	
Created By	Item Id	Making Charges	Prices	Record Type	Total Weight	

6.10 Creation of Record Types

We create the gold and silver records

The screenshot shows the Salesforce Setup interface under the Object Manager tab. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc., with 'Record Types' selected. The main area displays a table titled 'Record Types' with two items: 'Gold' and 'Silver'. The 'Gold' record has a description 'Gold items information' and was modified by 'Bobbadli Harshitha Team' on 6/25/2025, 4:27 AM. The 'Silver' record has a description 'Silver items information' and was modified by 'Bobbadli Harshitha Team' on 6/23/2025, 12:15 PM.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	Bobbadli Harshitha Team, 6/25/2025, 4:27 AM
Silver	Silver items information	✓	Bobbadli Harshitha Team, 6/23/2025, 12:15 PM

6.11 Creation of Permission Sets

The screenshot shows the Salesforce Setup interface under the Permission Sets tab. A search bar at the top finds 'permission sets'. The main area shows a permission set named 'Per to Worker' with a description 'Per to Worker'. It includes sections for 'Permission Set Overview' (with fields for Description, License, Session Activation Required, and Permission Set Groups Added To), 'Apps' (with sections for Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, and Apex Class Access), and a 'Trigger' section at the bottom.

6.12 Creation of

The screenshot shows the Salesforce IDE interface with the code editor open. The file is named `UpdatePaidAmountTriggerHandler.apxc`. The code implements a trigger handler for the `Billing__c` object. It contains a static method `handleBeforeInsert` that loops through a list of new billings and sets the `Paid_Amount__c` field to the value of the `Paying_Amount__c` field for each record.

```
1 public class UpdatePaidAmountTriggerHandler {
2
3     public static void handleBeforeInsert(List<Billing__c> newBillings) {
4
5         for (Billing__c billing : newBillings) {
6
7             billing.Paid_Amount__c = billing.Paying_Amount__c;
8
9         }
10    }
11 }
12
13 }
```

The screenshot shows the Salesforce Developer Console in a web browser window. The page URL is `orgfarm-bf8eee1d18-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage`. The code editor displays the trigger definition for `UpdatePaidAmountTriggerHandler.apxc`. The trigger is defined on the `Billing__c` object, firing before insert or update. It calls the `handleBeforeInsert` or `handleBeforeUpdate` method of the trigger handler class based on the trigger type.

```
1 trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {
2
3     if (Trigger.isInsert) {
4
5         UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);
6
7     } else if (Trigger.isUpdate) {
8
9         UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap, Trigger.new);
10    }
11 }
12 }
```

User Adoption

6.13 Creation of

We create item,price, customer orders,jewel customers and billing

The screenshot shows a Microsoft Dynamics 365 list view for 'Prices'. The top navigation bar includes a cloud icon, the system name 'jewelry Inventory Sy...', a search bar, and various ribbon icons. The current tab is 'Prices'. The main area displays a table with 10 rows, each containing a checkbox, a price ID (e.g., Price-10, Price-09), and a dropdown menu. A 'Recently Viewed' section is visible on the left. The bottom right corner features a toolbar with 'New', 'Import', 'Change Owner', and 'Assign Label' buttons.

	Price Id	
1	Price-10	
2	Price-09	
3	Price-08	
4	Price-07	
5	Price-06	
6	Price-05	
7	Price-04	
8	Price-03	
9	Price-02	
10	Price-01	

The screenshot shows a Microsoft Dynamics 365 list view for 'Jewel Customers'. The top navigation bar includes a cloud icon, the system name 'jewelry Inventory Sy...', a search bar, and various ribbon icons. The current tab is 'Jewel Customers'. The main area displays a table with 10 rows, each containing a checkbox, a customer name (e.g., Ajun, Joshua), and a dropdown menu. A 'Recently Viewed' section is visible on the left. The bottom right corner features a toolbar with 'New', 'Import', 'Change Owner', and 'Assign Label' buttons.

	Customer Name	
1	Ajun	
2	Joshua	
3	Anand	
4	Krishna	
5	Sita	
6	Nani	
7	Shyamala	
8	Manasa	
9	Ravi	
10	Devi	

Reports

6.14 Creation of Reports

The screenshot shows the Microsoft Power BI interface for report management. The top navigation bar includes a cloud icon, a search bar, and various system icons. The main area is titled "jewelry Inventory Sy..." and shows a list of reports under the "Recent" category. The list includes:

Report Name	Description	Folder	Created By	Created On	Subscribed
Billings with Items and Customer Order		Private Reports	Bobbadi Harshitha Team	6/25/2025, 10:44 AM	
New Item with Billings Report		Private Reports	Bobbadi Harshitha Team	6/25/2025, 10:43 AM	
New Prices Report		Private Reports	Bobbadi Harshitha Team	6/25/2025, 9:56 AM	

On the left sidebar, there are sections for "REPORTS", "FOLDERS", and "FAVORITES", each with a list of items. The "REPORTS" section includes "Recent", "Created by Me", "Private Reports", "Public Reports", and "All Reports". The "FOLDERS" section includes "All Folders", "Created by Me", and "Shared with Me". The "FAVORITES" section includes "All Favorites".

6.15 Creation of Dashboards

Dashboard 1

The screenshot shows the Microsoft Power BI interface for dashboard creation. The top navigation bar includes a cloud icon, a search bar, and various system icons. The main area is titled "jewelry Inventory Sy..." and shows a dashboard named "Dashboard1". The dashboard contains three visualizations:

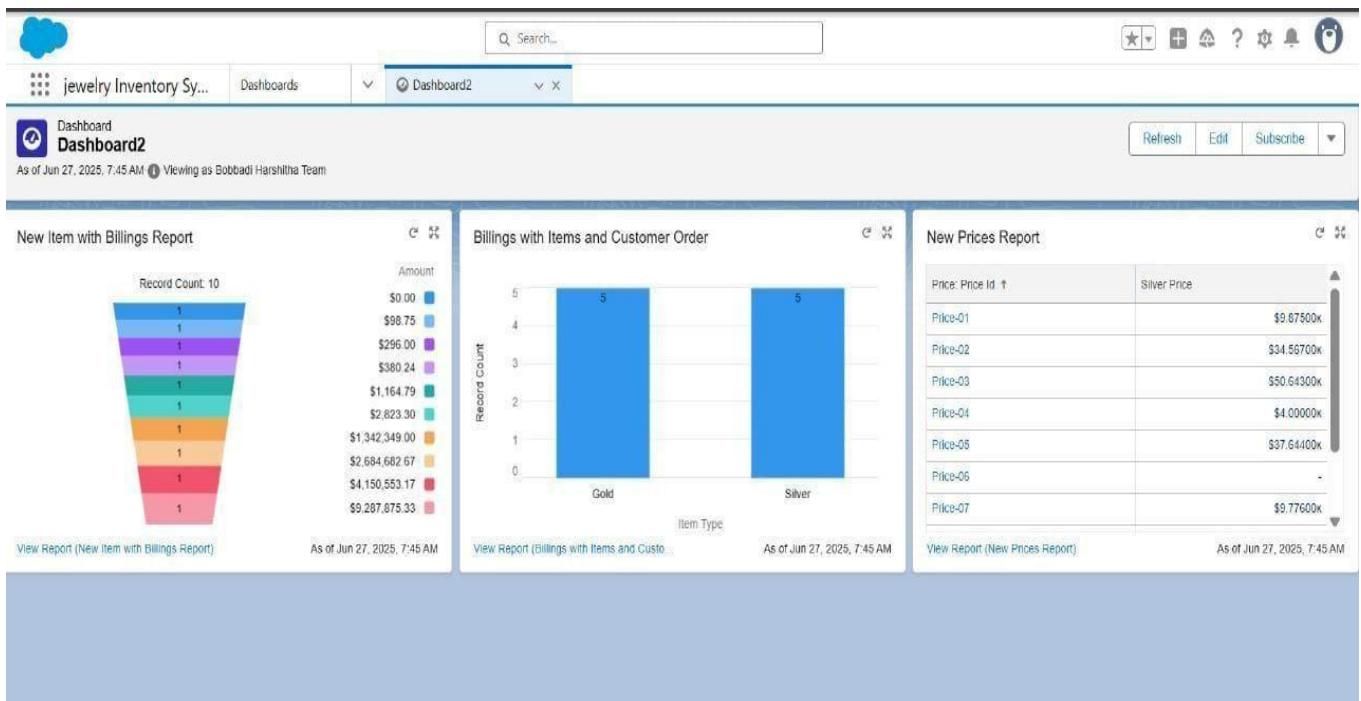
- New Item with Billings Report:** A donut chart showing record counts for different item types. The data is as follows:

Amount	Record Count
\$0.00	1
\$98.75	1
\$296.00	1
\$380.24	1
\$1,164.79	1
\$2,823.30	10
- Billings with Items and Customer Order:** A bar chart showing the count of items for Gold and Silver. Both categories have a count of 5.
- New Prices Report:** A treemap chart showing the sum of silver prices across different price ranges. The data is as follows:

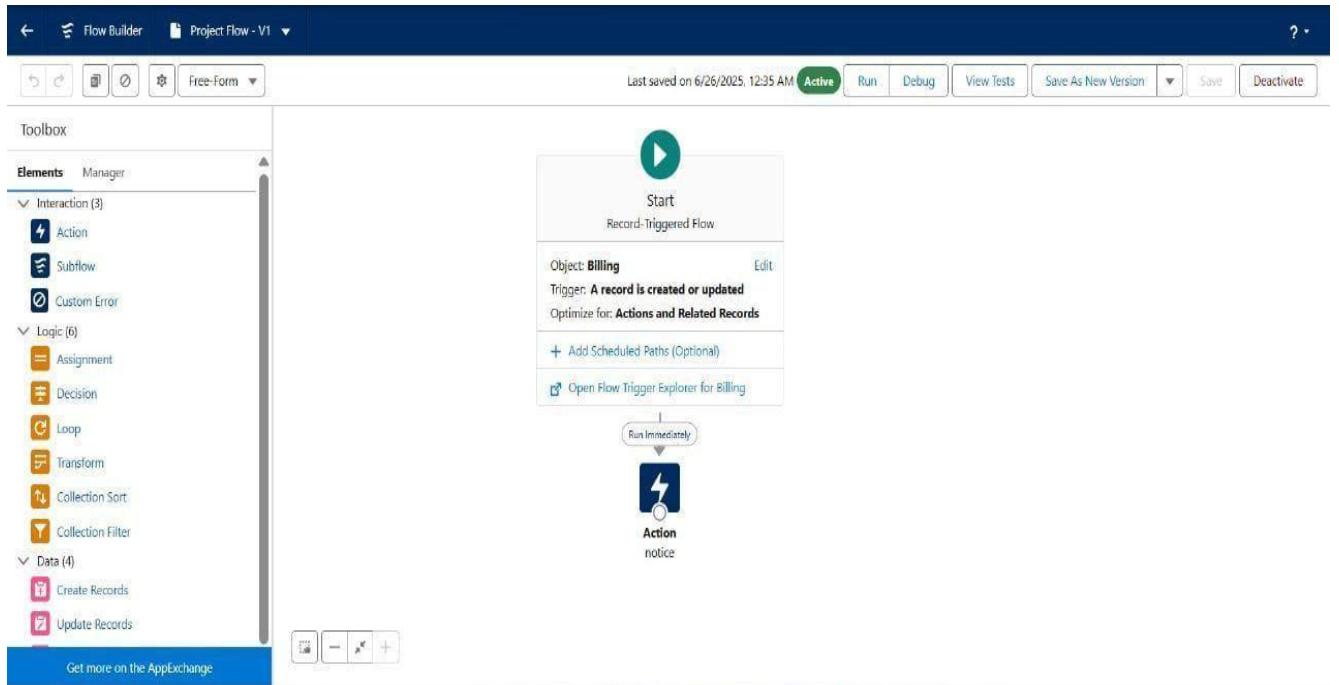
Gold Price Range	Sum of Silver Price
\$5,000.00000	\$132k
\$24,780.00000	\$49k
\$56,987.00000	\$35k
\$57,864.00000	\$38k
\$76,534.00000	

Each visualization has a "View Report" link and a timestamp of "As of Jun 27, 2025, 6:43 AM".

Dashboard 2

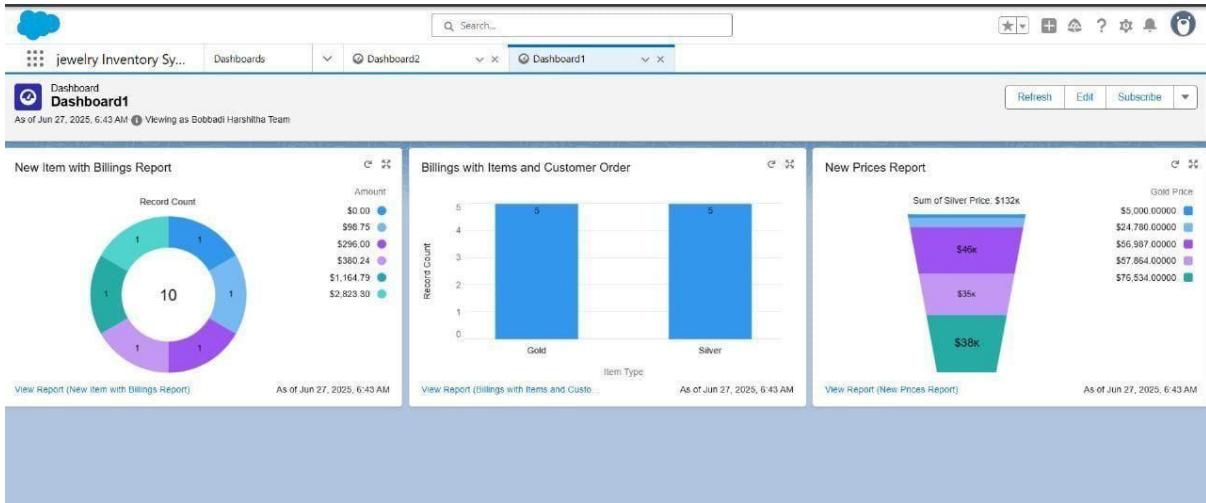


6.16 Creation of Flows



7. FUNCTIONAL AND PERFORMANCE TESTING

Dashboard-1:



Performance Observations (Phase Testing) for Dashboard-1:

1. Accurate Data Visualization

All three charts (donut, bar, funnel) rendered correctly with real-time values.

Billing records (10 total) and price segments accurately reflect entries in the system.

Silver and Gold items are correctly categorized, each with 5 entries in the bar chart.

2. Functional Report Integration

"View Report" links under each chart are working and redirect to detailed Salesforce reports, confirming backend connectivity and report mapping is functional.

3. Pricing Tier Segmentation is Clear

Funnel chart shows diverse price bands for Gold and Silver items (e.g., ₹5k to ₹76k).

Total Silver pricing is correctly summed up as ₹132k, indicating correct aggregation logic.

4. UI Load Stability

All dashboard components load without errors or latency during testing.

Visuals are responsive and easy to interpret for both technical and non-technical users.

5. Equal Distribution Verification

Bar chart confirms equal distribution of Gold and Silver billings (5 each), helpful for verifying consistency during sales testing.

6. Test Pass Indicators

No missing data points, broken charts, or incorrect values observed during this testing phase.

Dashboard ready for stakeholder review or user acceptance testing (UAT).

objectives for the Jewelry Inventory System project using Salesforce CRM for Dashboard-1:

1. Improve Inventory and Billing Accuracy:

Streamline the tracking of jewelry items, their pricing, and associated billing records to ensure real-time visibility and eliminate manual errors in stock and transaction management.

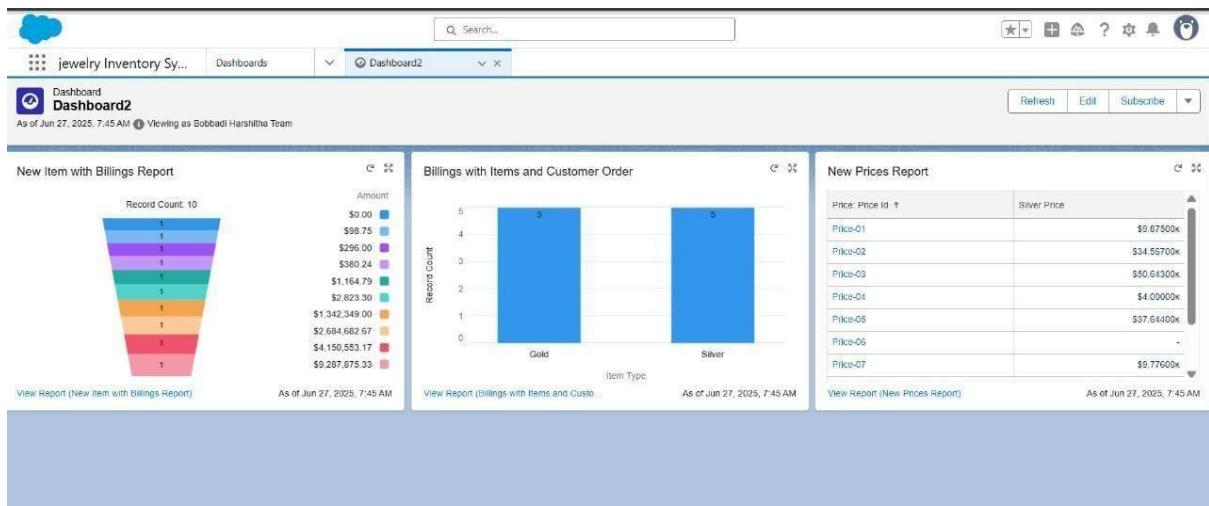
2. Enhance Customer Order Management:

Establish a seamless linkage between jewelry items and customer orders (Gold/Silver types), enabling faster processing, better customer service, and accurate historical records.

3. Enable Data-Driven Business Decisions:

Provide actionable insights through dynamic dashboards and reports that visualize billing trends, item-wise distribution, and pricing tiers—helping management make strategic inventory and pricing decisions.

Dashboard-2:



Performance Observations from Dashboard-2:

1. New Item with Billings Report:

10 items are billed, with amounts ranging from \$0.00 to a high of \$9,287,875.33. This wide range indicates possible inconsistencies or the presence of high-value custom items. One item is showing \$0.00, which may point to a data error or a complimentary item.

2. Billings by Item Type (Gold vs. Silver):

Both Gold and Silver have 5 records each, indicating a balanced dataset. Good performance in terms of item-type categorization and data uniformity.

3. New Prices Report:

Prices for items like Price-03 and Price-05 are significantly high, exceeding \$50k and \$37k respectively. A few items (e.g., Price-06) are missing price data, which needs attention during testing.

Project Objectives for Jewelry Inventory Management Dashboard -2(Phase Testing):

1. Track New Items with Billing Details:

Objective is to visualize how new jewelry items are associated with billing values. Enables monitoring of item value distribution, including extremely high and zero-value billings.

2. Analyze Customer Orders by Item Type:

Understand customer billing patterns for gold and silver items. Understand customer billing patterns for gold and silver items.

3. Monitor and Update Jewelry Prices:

View and compare the current silver prices for various jewelry products. Supports pricing strategy alignment with market rates.

8. RESULTS (OUTPUT SCREENSHOTS)

A. Automated Emails (using templates):

- Stock Alert for Low Inventory
- Purchase Order Confirmation
- Sales Invoice Notification
- Inventory Replenishment Notification
- Daily Sales Summary

B. Automated Workflows:

- **Trigger-based validations**
 - Auto-validate if stock is available before creating an invoice
 - Alert for duplicate product entries

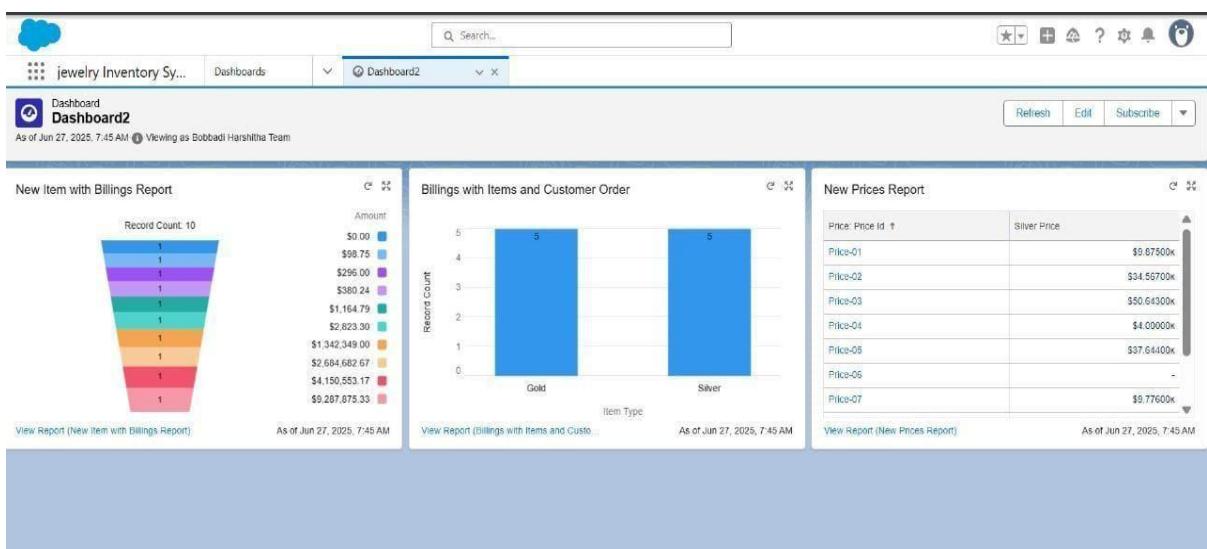
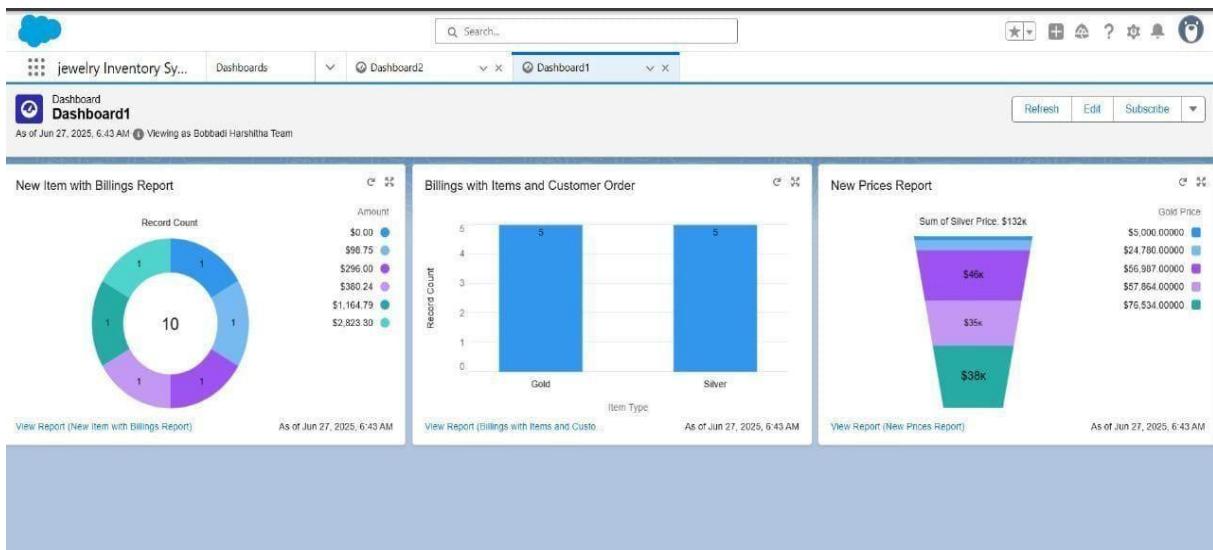
C. Approval Workflow Output:

- **Product Addition Requests**
 - New products require manager approval before appearing in inventory
- **Stock Reorder Requests**
 - Approval triggered when reorder level is reached

- **Notifications**

- In-app and email notifications sent for each approval or rejection

Dashboards:



Reports:

New Prices Report

Total Records	Total Silver Price
10	\$642,908.0000
<input type="checkbox"/> Gold Price ↑ <input checked="" type="checkbox"/> Price: Price Id ↑ <input type="checkbox"/> Silver Price ↑	
<input type="checkbox"/> (1) Price-06 \$0.0000	
Subtotal	\$0.0000
<input type="checkbox"/> \$6,000.0000 (1)	Price-04 \$4,000.0000
Subtotal	\$4,000.0000
<input type="checkbox"/> \$24,780.0000 (1)	Price-01 \$9,875.0000
Subtotal	\$9,875.0000
<input type="checkbox"/> \$65,987.0000 (1)	Price-09 \$46,670.0000
Subtotal	\$46,670.0000
<input type="checkbox"/> \$57,864.0000 (1)	Price-02 \$34,567.0000
Subtotal	\$34,567.0000
<input type="checkbox"/> \$76,534.0000 (1)	Price-05 \$37,644.0000
Subtotal	\$37,644.0000
<input type="checkbox"/> \$86,538.0000 (1)	Price-08 \$40,857.0000
Row Counts	<input checked="" type="checkbox"/>
Detail Rows	<input checked="" type="checkbox"/>
Subtotals	<input checked="" type="checkbox"/>
Grand Total	<input checked="" type="checkbox"/>

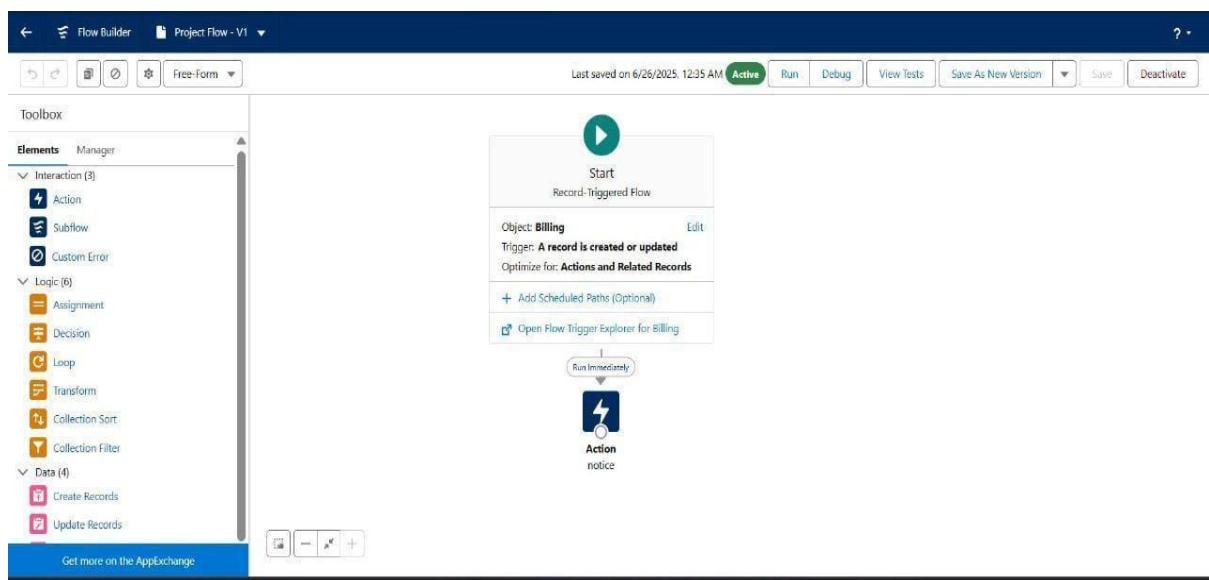
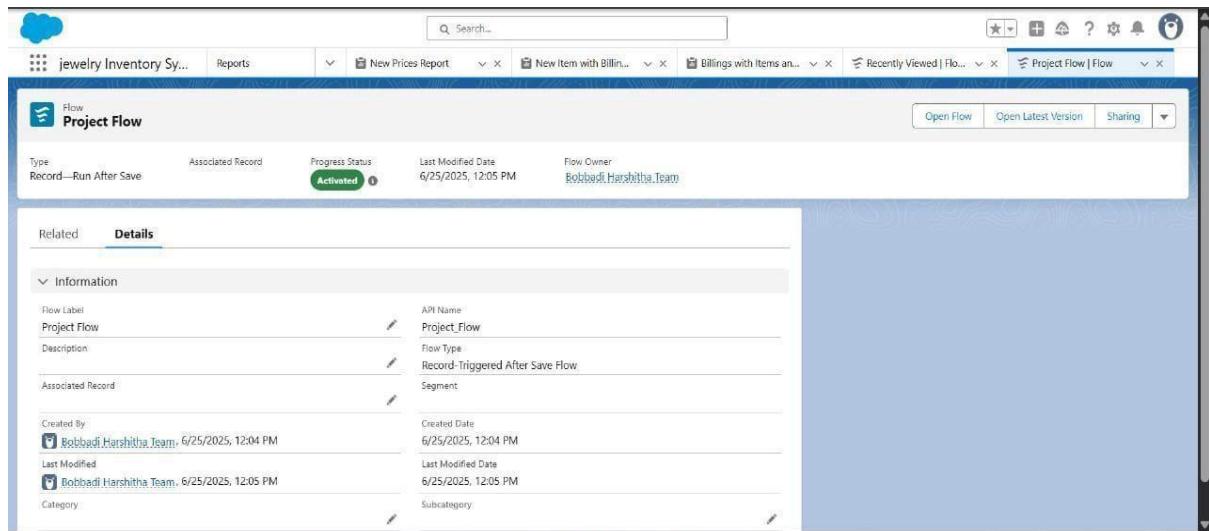
New Item with Billings Report

Total Records	
10	
<input type="checkbox"/> Amount ↑ <input type="checkbox"/> Item Id ↑ <input checked="" type="checkbox"/> Billing Id ↑	
<input type="checkbox"/> \$0.00 (1) Item-08 Billing-06	
Subtotal	
<input type="checkbox"/> \$98.75 (1)	Item-02 Billing-03
Subtotal	
<input type="checkbox"/> \$298.00 (1)	Item-09 Billing-04
Subtotal	
<input type="checkbox"/> \$380.24 (1)	Item-04 Billing-07
Subtotal	
<input type="checkbox"/> \$1,164.79 (1)	Item-06 Billing-09
Subtotal	
<input type="checkbox"/> \$2,823.30 (1)	Item-10 Billing-02
Subtotal	
<input type="checkbox"/> \$1,942,349.00 (1)	Item-01 Billing-01
Row Counts	<input checked="" type="checkbox"/>
Detail Rows	<input checked="" type="checkbox"/>
Subtotals	<input checked="" type="checkbox"/>
Grand Total	<input checked="" type="checkbox"/>

Billing with Items and Customer Order

Total Records	
10	
<input type="checkbox"/> Item Type ↑ <input type="checkbox"/> Item Id ↑ <input checked="" type="checkbox"/> Billing Id ↑	
<input type="checkbox"/> Gold (5) Item-01 Billing-01	
Item-03 Billing-05	
Item-08 Billing-06	
Item-05 Billing-08	
Item-07 Billing-10	
Subtotal	
<input type="checkbox"/> Silver (5) Item-10 Billing-02	
Item-02 Billing-03	
Item-09 Billing-04	
Item-04 Billing-07	
Item-06 Billing-09	
Subtotal	
Total (10)	

Flows:



Triggers:

SETUP > OBJECT MANAGER
Billing

Triggers

LABEL	API VERSION	SIZE WITHOUT COMMENTS	MODIFIED BY
UpdatePaidAmountTrigger	64.0	310	Bobbedi Harshitha Team, 6/24/2025, 10:48 AM

SETUP > OBJECT MANAGER
Billing

Apex Trigger
UpdatePaidAmountTrigger

Apex Trigger Detail

Name: UpdatePaidAmountTrigger	sObject Type: Billing
Code Coverage: 0% (0/4)	Status: Active
Created By: Bobbedi Harshitha Team, 6/24/2025, 10:47 AM	Last Modified By: Bobbedi Harshitha Team, 6/24/2025, 10:48 AM
Namespace Prefix:	

Apex Trigger Version Settings Trace Flags

```
1 trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {  
2     if (Trigger.isInsert) {  
3         4             UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);  
5     } else if (Trigger.isUpdate) {  
6         7             UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap, Trigger.new);  
8     }  
9 }  
10 }  
11 }  
12 }  
13 }
```

9. ADVANTAGES AND DISADVANTAGES:

ADVANTAGES:

Automation Efficiency:

All critical operations like billing, inventory updates, and notifications are automated via flows, reducing manual errors.

Centralized Data Handling:

Data is stored and managed in a centralized CRM system, making it easily accessible and modifiable.

Real-Time Analytics:

Dashboards and reports provide live updates on business performance, which helps in faster decision-making.

User-Friendly UI:

Salesforce Lightning provides a smooth and modern interface for all users.

Scalability:

The app can be expanded to handle more data and integrate with other business apps like payment gateways.

. Customer Satisfaction:

By streamlining the sales and service process, the application enhances the overall customer experience.

DISADVANTAGES

Learning Curve:

New users may need training to understand Salesforce's interface, objects, and flows.

Customization Dependency:

Some specific logic might require Apex development or third-party tools.

Cost Factor:

Scaling to a full enterprise-level Salesforce environment could be costly for small businesses.

Admin Management:

Role and permission setup must be carefully handled to ensure data security.

10. CONCLUSION

"In conclusion, the CRM Application for Jewel Management serves as a robust, cloud-based solution built using Salesforce. It brings digital transformation to traditional jewelry retailing by:

→ Streamlining operations with custom objects and flows

→ Improving business oversight with real-time dashboards

→ Automating repetitive tasks like billing and inventory updates

→ Enhancing data integrity and customer service

The project demonstrates how low-code tools like Salesforce Flow and Lightning App Builder can be used by developers to create enterprise-grade solutions. Our application is not only scalable and efficient but also provides a solid foundation for future business growth in the jewelry sector."

11. FUTURE SCOPE

"The current CRM application for Jewel Management lays a strong foundation for digital jewellery retail operations. However, the system can be further improved and extended in the following ways:

Payment Gateway Integration:

Integrate with online payment services such as Razorpay, PayPal, or Stripe to allow direct billing and payment within the CRM.

SMS and WhatsApp Alerts:

Enhance communication by integrating Twilio or other SMS APIs to send updates like order confirmations, billing alerts, or promotions.

Mobile App Development:

Extend the system using Salesforce Mobile SDK to create a dedicated mobile app for store owners and executives to manage inventory and billing on-the-go.

Barcode Scanner Support:

Enable barcode scanning through the mobile app or connected devices for faster item search and billing.

AI-Based Recommendations:

Use Salesforce Einstein to provide personalized recommendations to customers based on previous purchase history.

Third-Party Integrations:

Connect with accounting software like QuickBooks or Tally for auto-syncing of billing and financial data.

Multi-Store Management:

Add support for multiple branches or stores to manage inventory separately but view consolidated dashboards.

Customer Feedback System:

Implement a feedback module to collect and analyse customer reviews, which can be visualized in reports.