

CRM application for Jewel Management

College Name: HINDUSTHAN COLLEGE OF SCIENCE AND COMMERCE

College Code : CA

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1.INTRODUCTION

1.1 Project Overview

This project outlines the development of a Customer Relationship Management (CRM) system specifically tailored for the jewelery industry. The system is designed to help jewelers automate business processes, manage high-value inventory, and foster strong, personalized customer relationships.

1.2 Purpose

The purpose of creating a Customer Relationship Management (CRM) jewel management system is to provide jewelers and jewelry businesses with a specialized tool to handle the unique challenges of their industry. A developer creates this software to integrate inventory management, sales tracking, and customer relationship functionalities into one streamlined platform.



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First name

Dharunikha ✓

Last name

k p ✓

Job title

developer ✓

Work email

dharunikhakup@gmail.com ✓

Company

hindusthan college of engineering ✓

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 24 days.

Created named Gold smith and Worker:

orgfarm-ed7ec68d8a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gK000001wvIK/view

Guest

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Jewel Customer

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

Details

Description

API Name

Jewel_Customer__c

Custom

✓

Singular Label

Jewel Customer

Plural Label

Jewel Customers

Enable Reports

✓

Track Activities

Track Field History

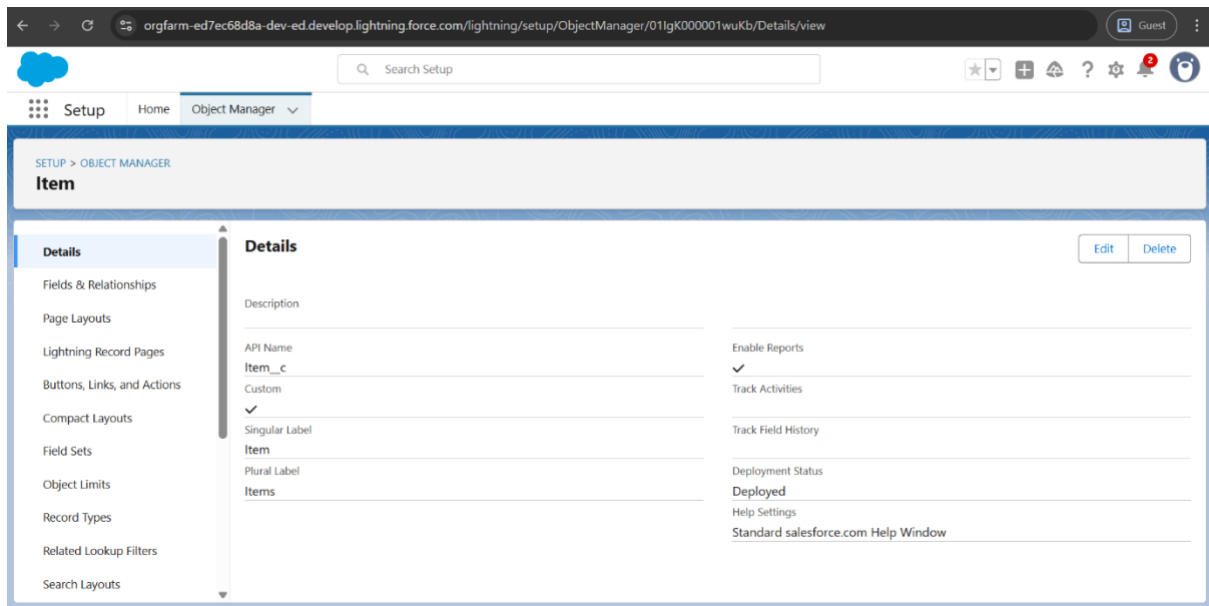
Deployment Status

Deployed

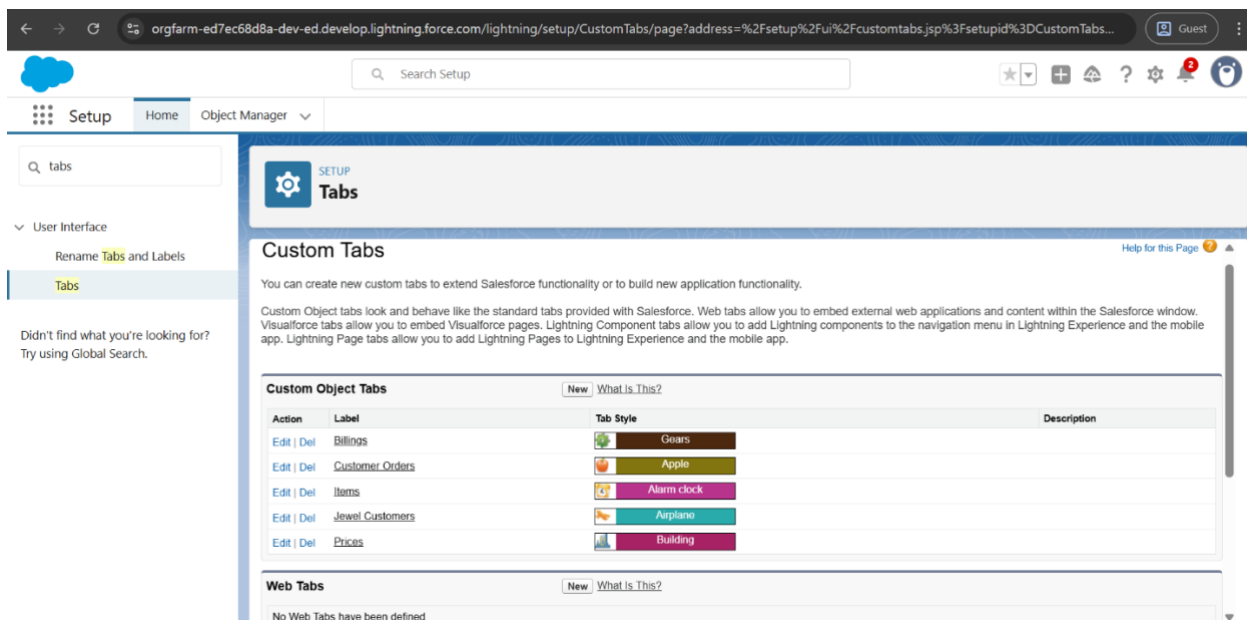
Help Settings

Standard salesforce.com Help Window

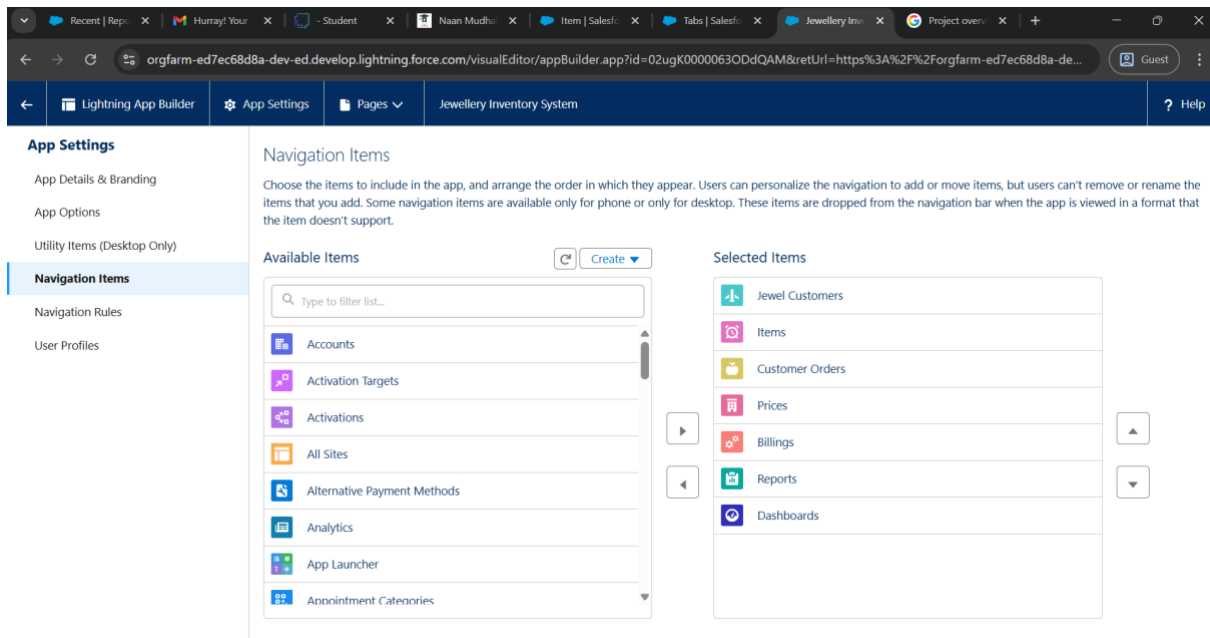
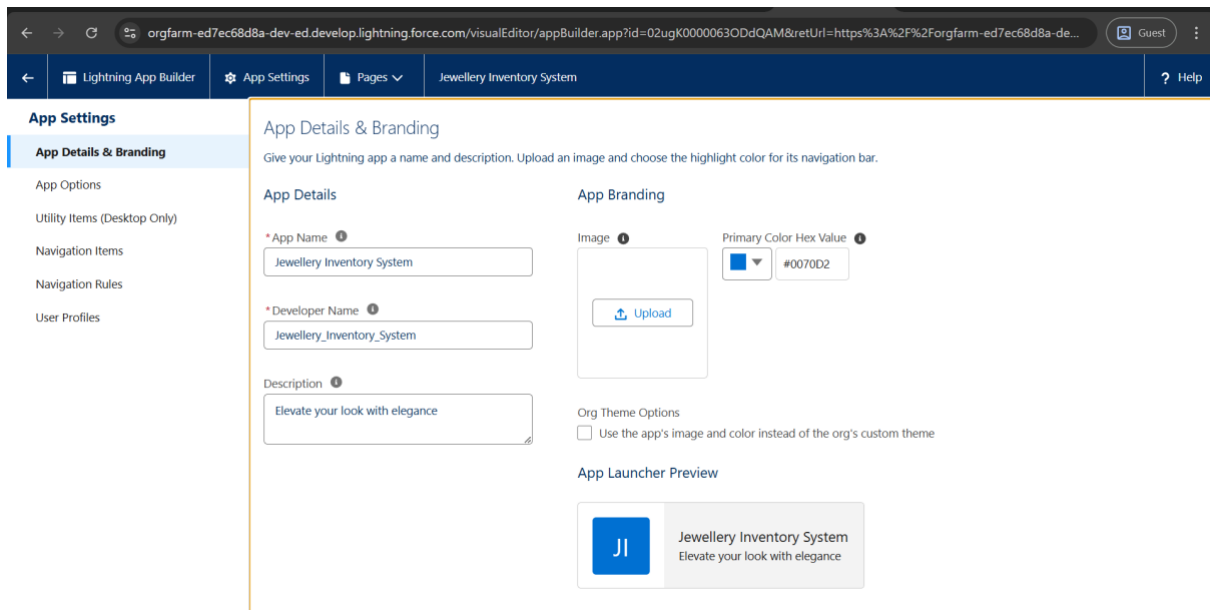
Edit Delete



Created Custom Tabs for Jewel Customer, Customer Order, Price, Billing objects:



Created Lightning App for Jewellery Inventory System:



Created fields in customer order, jewel customer, item, price :

orgfarm-ed7ec68d8a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001wv3l/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Customer Order

Details

Fields & Relationships
6 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

orgfarm-ed7ec68d8a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001wvK/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Jewel Customer

Details

Fields & Relationships
21 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
City	City__c	Text(20)		
Country	Country__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Gold/Silver Price	Gold_Silver_Price__c	Formula (Currency)		
Item	Item__c	Lookup(Item)		✓
Jewel Customer Name	Name	Text(80)		✓

orgfarm-ed7ec68d8a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001wukb/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Item

Details

Fields & Relationships
23 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

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 Name	Name	Auto Number		✓
Item Type	Item_Type__c	Picklist		
KDM	KDM__c	Formula (Currency)		
Last Modified By	LastModifiedById	Lookup(User)		

Created Profiles for Gold smith and Worker:

orgfarm-ed7ec68d8a-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egK0000052s1R

Search Setup

Setup Home Object Manager

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Approval Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Profiles

Profile: Gold Smith

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Settings Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail

Name: Gold Smith

User License: Salesforce

Description:

Created By: ABDULLAH M. 9/15/2025, 8:15 AM

Modified By: ABDULLAH M. 9/15/2025, 11:34 PM

Page Layouts

Standard Object Layouts

Global: Global Layout [View Assignment]

Email Application: Not Assigned [View Assignment]

Home Page Layout: Home Page Default [View Assignment]

Account: Account Layout [View Assignment]

Location Group Assignment: Location Group Assignment Layout [View Assignment]

Macro: Macro Layout [View Assignment]

Object Milestone: Object Milestone Layout [View Assignment]

Operating Hours: Operating Hours Layout [View Assignment]

Opportunity: Opportunity Layout

orgfarm-ed7ec68d8a-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egK0000054rcl%3Fsetupid%3DEnhancedProfiles

Search Setup

Setup Home Object Manager

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Approval Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Profiles

Profile: worker

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges | Enabled Apex Class Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Settings Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail

Name: worker

User License: Analytics Cloud Integration User

Description:

Created By: ABDULLAH M. 9/16/2025, 2:59 AM

Modified By: ABDULLAH M. 9/16/2025, 2:59 AM

Page Layouts

Standard Object Layouts

Global: Global Layout [View Assignment]

Email Application: Not Assigned [View Assignment]

Home Page Layout: Home Page Default [View Assignment]

Account: Account Layout [View Assignment]

Location Group Assignment: Location Group Assignment Layout [View Assignment]

Macro: Macro Layout [View Assignment]

Object Milestone: Object Milestone Layout [View Assignment]

Operating Hours: Operating Hours Layout [View Assignment]

Opportunity: Opportunity Layout

Created roles for Gold smith and Worker:

orgfarm-ed7ec68d8a-dev-ed.develop.lightning.force.com/lightning/setup/Roles/page?address=%2F00E%2F%3Fparent%3D00EgK000003f6kT%26setupid%3DRol...

Search Setup

Setup Home Object Manager

Hyperforce Assistant

Users

Roles

Data

Mass Transfer Approval Requests

Feature Settings

Approval Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Roles

Role Edit

New Role

Role Edit

Label: gold smith

Role Name: gold_smith

This role reports to: CEO

Role Name as displayed on reports: gold smith

Save Save & New Cancel

orgfarm-ed7ec68d8a-dev-ed.develop.lightning.force.com/lightning/setup/Roles/page?address=%2F00E%2Fe%3Fparent%3D00EgK000003f6kT%26setupid%3DRol...

Search Setup

Setup Home Object Manager

roles

Users Roles

Feature Settings Sales Service Case Teams

Contact Roles on Contracts Contact Roles on Opportunities Case Team Roles Contact Roles on Cases

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

Role Edit

New Role

Role Edit

Label worker

Role Name worker

This role reports to CEO

Role Name as displayed on reports worker

Save Save & New Cancel

Created users:

orgfarm-ed7ec68d8a-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups Permission Sets Profiles Public Groups Queues Roles User Management Settings Users

Feature Settings Data.com Prospector Users Service Embedded Service Messaging for In-App and Web User

Users

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. Let's Go

View: All Users Edit | Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	boomi_mel	mboom	abdulamm4206@gmail.com	Worker	✓	Salesforce Platform User
<input type="checkbox"/> Edit	Chatter_Expert	Chatter	chatt.00d9k00000a5gotuab.smfu01s6vqu@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	EPIC_OrgFarm	CEPIC	epic.eb93f1ecdb7a@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	M.ABDULLAH	abd	abdulahmm4206361@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Mikaelson_kel	mik	dharunka@gmail.com	Worker	✓	Salesforce Platform User
<input type="checkbox"/> Edit	Mikaelson_Niklaus	nmika	dharunka@gmail.com	Gold Smith	✓	Gold Smith
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d9k00000a5gotuab.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d9k00000a5gotuab.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

Created record types for Gold and Silver:

orgfarm-ed7ec68d8a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gK000001wuKb/RecordTypes/012gK000002RaZ/QA0/edit

Guest

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Item

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

Edit Record Type

Gold

Enter a new name for the selected record type and click Save.

Record Type

Record Type Label Gold

Record Type Name Gold

Namespace Prefix

Description Gold items information

Active ☒

Save Cancel

Required Information

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Item

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

Edit Record Type

silver

Enter a new name for the selected record type and click Save.

Record Type

Record Type Label silver

Record Type Name silver

Namespace Prefix

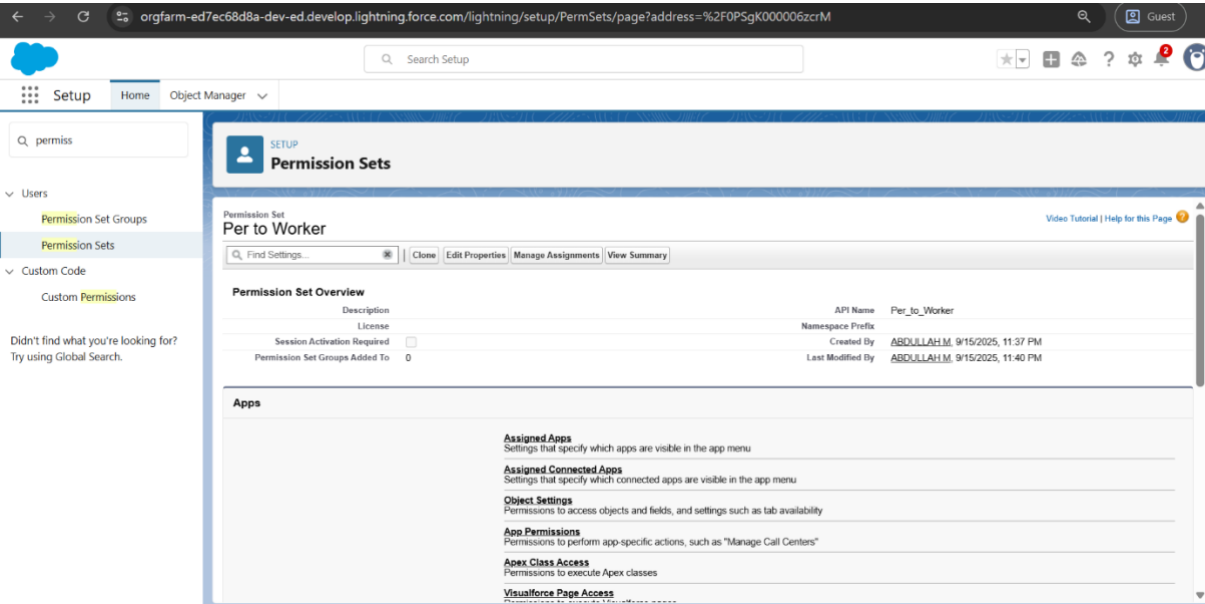
Description silver items information

Active ☒

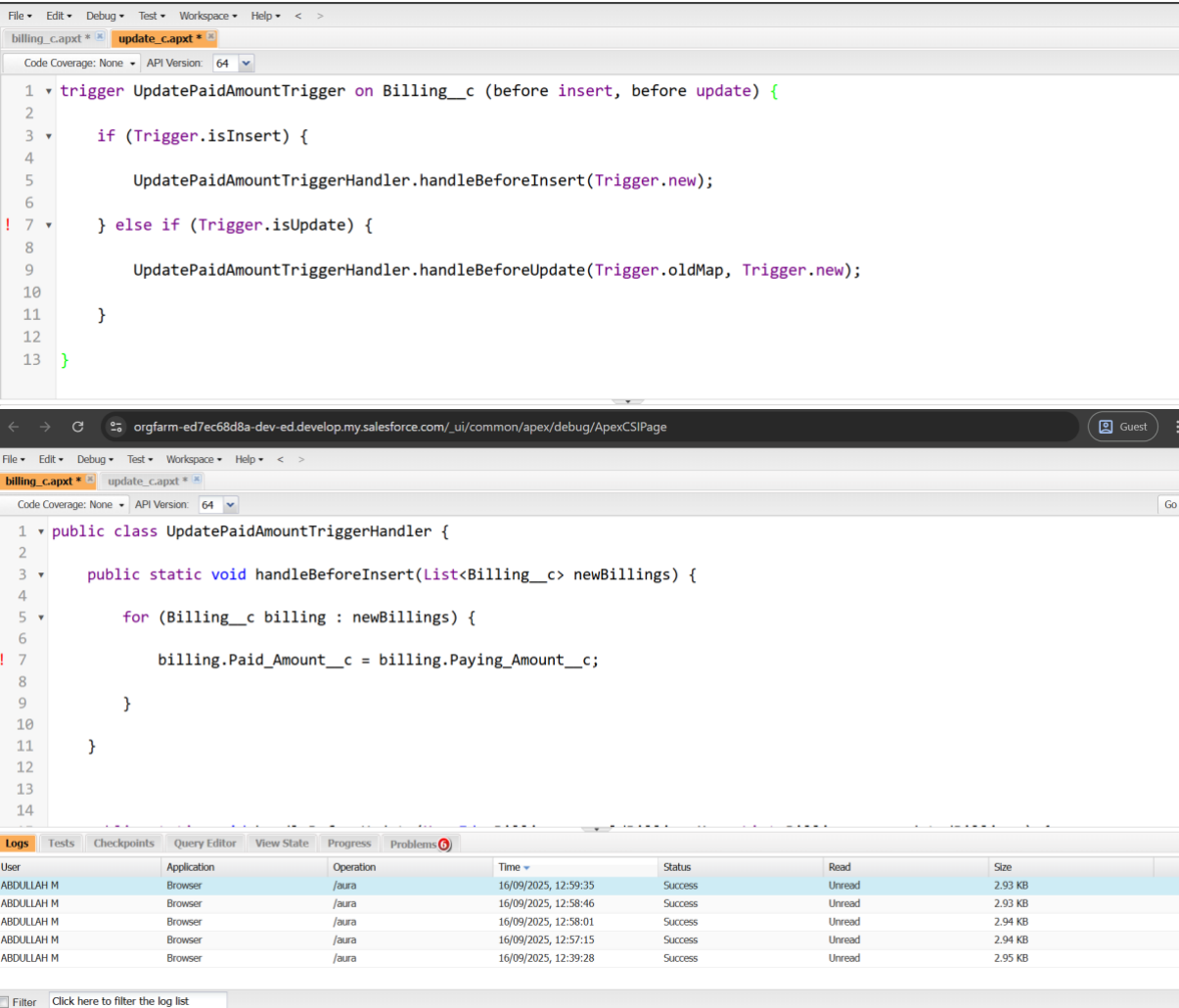
Save Cancel

Required Information

Created Permission Set as Per to Worker:



Created Trigger:



User Adoption:

created a record for jewel customer:

Search...

★

+

?

⚙️

🔔

👤

Jewellery Inventory ...

Jewel Customers

▼

👤 riyaa

▼

×

Jewel Customers

Recently Viewed

▼

👤

13 items • Updated a few seconds ago

Q

Search this list...

⚙️

📄

🔄

✎

🗑️

▼

<input type="checkbox"/>	Jewel Customer Name	▼
1	<input type="checkbox"/> janani	▼
2	<input type="checkbox"/> pravin	▼
3	<input type="checkbox"/> kabiles	▼
4	<input type="checkbox"/> naveen	▼
5	<input type="checkbox"/> premika	▼
6	<input type="checkbox"/> sanjay	▼
7	<input type="checkbox"/> abu	▼
8	<input type="checkbox"/> rithes	▼
9	<input type="checkbox"/> dharun	▼
10	<input type="checkbox"/> reha	▼
11	<input type="checkbox"/> zuvi	▼
12	<input type="checkbox"/> boomi	▼
13	<input type="checkbox"/> prema	▼

Search...

★

+

?

⚙️

🔔

👤

Jewellery Inventory ...

Reports

▼

📈 prema | Je...

▼

×

📈 boomi | Je...

▼

×

📈 zuvi | Jewe...

▼

×

📈 reha | Jew...

▼

×

Report Bui...

▼

×

More

▼

Report: Billings with Item

New Billings with Item Report

✎

Enable Field Editing

Q

📊

Add Chart

▼

🔄

✎

Edit

▼

Total Records

0

Total Gold/Silver Price

\$0.00

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

orgfarm-ed7ec68d8a-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJyZXhvcnRzOnJlcG9ydEJ1aWwkZXliLCJhdHRyaWJ1dGVzjp7InJlY29y...

Guest

Search...

Report Builder

More

Report: Items with Customer Orders and Customer

New Report

Enable Field Editing

Search

Add Chart

Filter

Refresh

Edit

Total Records

7

Total Gold Price

\$18,916,286.00

Total Silver Price

156.904

	Item: Item Name	Customer Order: Customer Order Name	Customer: Jewel Customer Name	Gold Price	Silver Price
1	Item-02	Item-05	janani	\$8,888,886.50	77.721
2	Item-02	Item-02	pravin	\$8,888,886.50	77.721
3	Item-01	Item-01	naveen	\$8,888,886.50	77.721
4	Item-01	Item-03	naveen	\$8,888,886.50	77.721
5	Item-04	Item-06	premika	\$30,000.00	1.000
6	Item-05	Item-07	pravin	\$554,256.50	0.231
7	Item-03	Item-04	premika	\$554,256.50	0.231
8				\$18,916,286.00	156.904

orgfarm-ed7ec68d8a-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJyZXhvcnRzOnJlcG9ydEJ1aWwkZXliLCJhdHRyaWJ1dGVzjp7InJlY29y...

Guest

Search...

Report Builder

More

Report: Prices

New Prices Report

Enable Field Editing

Search

Add Chart

Filter

Refresh

Edit

Total Records

7

Total Gold Price

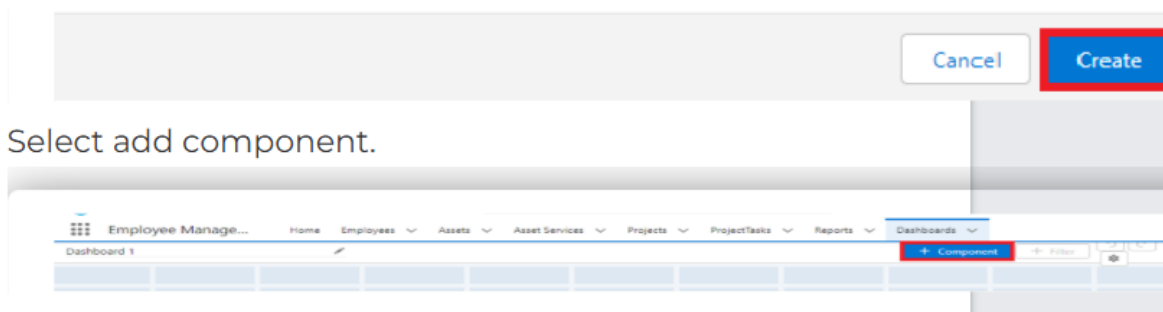
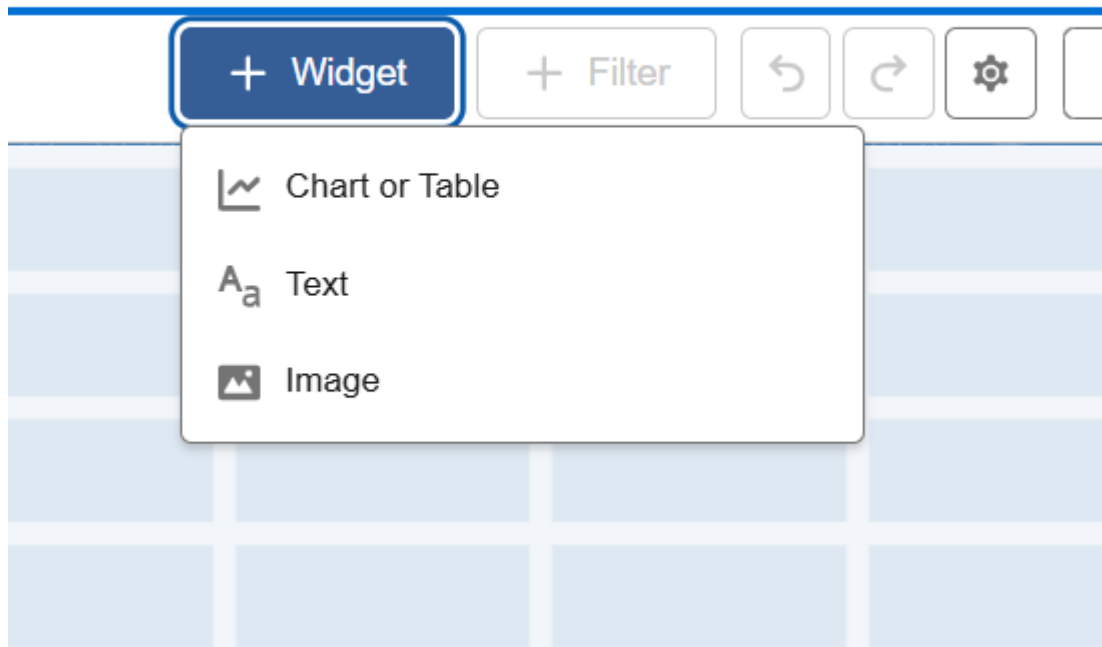
\$96,231,430

Total Silver Price

\$93,352.00000

	Price: Price Name	Gold Price	Silver Price
1	Item-04	\$200,000	\$1,200.00000
2	Item-06	\$88,888,865	\$77,721.00000
3	Item-01	\$500,000	\$200.00000
4	Item-02	\$700,000	\$5,000.00000
5	Item-03	\$300,000	\$1,000.00000
6	Item-05	\$5,542,565	\$231.00000
7	Item-07	\$100,000	\$8,000.00000
8		\$96,231,430	\$93,352.00000

Created Dashboard:



3. Select add component.



Search...



Jewelry Inventory S...

Dashboards

Report Builder

New Items with Billin...

New Report billing w...

Dashboard 1

Dashboard 1

+ Component

+ Filter



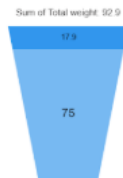
Save



Done

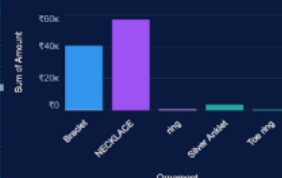
New Items with Billings Report

Item Type
Gold
Silver



View Report (New Items with Billings Report)

New Report billing with items with order



View Report (New Report billing with items with order)

New Prices Report

Price: Price ↑	Gold price	Silver price
p-021	161.00000e	172.00000e
p-022	160.00000e	171.00000e
p-023	158.00000e	169.00000e
p-024	162.00000e	173.00000e
p-025	158.00000e	169.00000e
p-026	162.00000e	173.00000e
p-027	162.35000e	170.20000e

View Report (New Prices Report)

At last create a Flows as Per the Instruction given:

Created Flow:

