

CRM APPLICATION FOR JEWEL MANAGEMENT

CollegeName: NANDHA ARTS AND SCIENCE COLLEGE (AUTONOMOUS)

CollegeCode: bru4j

TEAMID: NM2025TMID22871

TEAMMEMBERS:

TeamLeaderName: Deepika.B

Email: deepikab906@gmail.com

TeamMember1: Devika.V

Email: devivelu.2610@gmail.com

TeamMember2: Ansia.M

Email: ansiaabusa@gmail.com

TeamMember3: Akashkumar.K.R

Email: akashkumarajajraja2006@gmail.com

1.INTRODUCTION

1.1 Project overview

CRM application for a jewelry management project aims to improve customer relationships, streamline sales and marketing processes, and centralize customer data to foster growth. It include managing customer profiles, tracking purchase history, enabling personalized communication, and analyzing customer behavior to offer purpose tailored recommendations and conduct targeted marketing campaigns. By centralizing information and automating tasks, a jewelry CRM enhances customer satisfaction, drives loyalty, and provides valuable insights for better business decisions and increased sales.

1.2 Purpose

The main purpose of the project is to:

Gathers data on preferences, buying history, and behaviors to personalize outreach and improve satisfaction.

Tracks inquiries and sales leads, automates follow- ups, and enables personalized marketing campaigns based on customer data.

Analyzes sales data to identify top- selling and slow- moving items, helping to optimize stock levels.

Streamlines communication, handles customer feedback, and provides personalized support by documenting all interactions.



Enhances sales efficiency and provides a comprehensive view of the business to facilitate growth

2.DEVELOPMENT PHASE

Creating Developer Account

The project was developed on salesforce developer org, created via:

<https://developer.salesforce.com/signup>



salesforce.com/form/de



3



Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

Sign up for your Developer Edition.

- ✓ Build apps fast with drag-and-drop tools
- ✓ Go further with Apex code
- ✓ Build AI agents with Agentforce
- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs



Sign up for your Developer Edition

A free Salesforce Platform environment with Agentforce and Data Cloud

First name

Last name

Job title

Work email

Company

Country/Region

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.

We value your privacy. To learn more, visit our [Privacy Statement](#).

Sign Me Up



Worldwide

[Legal](#) [Terms of Service](#) [Privacy Information](#) [Responsible Disclosure](#) [Trust](#) [Contact](#)
[Cookie Preferences](#) [Your Privacy Choices](#)

© Copyright 2025 Salesforce, Inc. All rights reserved. Various trademarks held by their respective owners. Salesforce, Inc. Salesforce Tower, 415 Mission Street, 3rd Floor, San Francisco, CA 94105, United States

Object Created

Jewel customer – To store and manage information about customer.



elop.lightning.force.com



4



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

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

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


Custom Tabs – Custom object look and behave like the standard tabs provided with salesforce.











elop.lightning.force.com



4







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

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Details

Description

API Name

Item__c

Custom

✓

Singular Label

Item

Plural Label

Items

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

Fields validation rules – Creating the validation rules for postal code field in jewel customer object.

Home elop.lightning.force.com + 4

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
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Conditional Field Formatting

Jewel Customer Validation Rule

[Back to Jewel Customer](#) [Help for this Page](#)

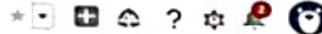
Validation Rule Detail [Edit](#) [Clone](#)

Rule Name	Postal_Code	Active	✓
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", select the Error location as Field and select the field as "Zip/Postal code"	Error Location	Top of Page
Description			
Created By	Renuga.sri.R. 8/31/2025, 3:07 AM	Modified By	Renuga.sri.R. 8/31/2025, 3:07 AM

[Edit](#) [Clone](#)

Roles for gold smith - A Role is user visibility access at the record level.

Gold – Expand all and click on add role.



Search Setup

Setup

Home

Object Manager

Roles

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

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

SETUP
Roles

Creating the Role Hierarchy

Help for this Page

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Show in tree view

[Collapse All](#) [Expand All](#)

TheSmartbridge

Add Role

CEO Edit | Del | Assign

Add Role

CEO Edit | Del | Assign

Add Role

COO Edit | Del | Assign

Add Role

Gold Smith Edit | Del | Assign

Add Role

Worker Edit | Del | Assign

Add Role

SVP, Customer Service & Support Edit | Del | Assign

Add Role

Customer Support, International Edit | Del | Assign

Add Role

Customer Support, North America Edit | Del | Assign

Add Role

Installation & Repair Services Edit | Del | Assign

Add Role

SVP, Human Resources Edit | Del | Assign

Add Role

SVP, Sales & Marketing Edit | Del | Assign

Add Role

VP, International Sales Edit | Del | Assign

Add Role

VP, Marketing Edit | Del | Assign

Add Role

Marketing Team Edit | Del | Assign

Add Role

VP, North American Sales Edit | Del | Assign

Add Role

Director, Channel Sales Edit | Del | Assign

Add Role

Channel Sales Team Edit | Del | Assign

Add Role

Director, Direct Sales Edit | Del | Assign

Add Role

Eastern Sales Team Edit | Del | Assign

Add Role

Western Sales Team Edit | Del | Assign

Add Role

Users – To create two more user in same profile.

The screenshot shows the Salesforce Lightning Setup page for Users. The page layout includes a sidebar on the left with navigation options and a main content area on the right. The main content area displays a table of all users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users including Chatter Expert, EPIC Org Farm, Mikaelson, R. Renuga, User Integration, and User Security.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dgl000009xqefua2-xc92e7qw7q6v@chatter.salesforce.com		✓	Chatter Fr User
<input type="checkbox"/> Edit	EPIC Org Farm	OEPIE	epic.ce436a7388ae@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Mikaelson, Kol	kmika	renuga@renu.com	Worker	✓	Worker profiles
<input type="checkbox"/> Edit	Mikaelson, Niklaus	nmika	renu@renu.com	Gold Smith	✓	Gold Smith
<input type="checkbox"/> Edit	R. Renuga, Sri	ren	renugasri900443@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	User, Integration	integ	integration@00dgl000009xqefua2.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User, Security	sec	insightssecurity@00dgl000009xqefua2.com		✓	Analytics Cloud Security User

Page layout for gold and silver – A Page layout is used to allow customise design and organise detail and edit page of records.

Gold – Click the object manager in page layout, to create the gold page layout.

Silver – Like same procedure the silver page layout also.

9



elop.lightning.force.com



4



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

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Record Types

2 Items, Sorted by Record Type Label

Quick Find

New

Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	Renuga sri R, 9/1/2025, 7:09 AM
Silver	Silver items information	✓	Renuga sri R, 9/1/2025, 7:12 AM

Home elop.lightning.force.com + 4

Search...

Jewellery Inventory ... Jewel Customers Items Prices Orders Billings Reports More

Jewel Customers Recently Viewed

10 items • Updated a few seconds ago Search this list...

	<input type="checkbox"/> Customer name	
1	<input type="checkbox"/> durga	▼
2	<input type="checkbox"/> pavi	▼
3	<input type="checkbox"/> rasika	▼
4	<input type="checkbox"/> suji	▼
5	<input type="checkbox"/> gowsik	▼
6	<input type="checkbox"/> gowtham	▼
7	<input type="checkbox"/> moorthy	▼
8	<input type="checkbox"/> dhanam	▼
9	<input type="checkbox"/> Renuga	▼
10	<input type="checkbox"/> Sample 1	▼

3.IMPLEMENTATION

Profiles – A Profile is a group of setting and permission that define what a user can do. Profile controls “object permission, field permission, user permission, tab setting, app setting, apex class access, page layout, record types”.



elop.lightning.force.com



4



Search Setup



Setup

Home

Object Manager

Profiles

Users

Profiles

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



SETUP
Profiles

Profiles

Help for this Page

All Profiles Edit | Delete | Create New View


New Profile

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

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	
<input type="checkbox"/> Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	
<input type="checkbox"/> Edit Clone	Anypoint Integration	Identity	
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	
<input type="checkbox"/> Edit Del ...	B2B Reordering Portal Buyer Profile	External Apps Login	✓
<input type="checkbox"/> Edit Clone	Chatter External User	Chatter External	
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	
<input type="checkbox"/> Edit Clone	Chatter Moderator User	Chatter Free	
<input type="checkbox"/> Edit Clone	Contract Manager	Salesforce	
<input type="checkbox"/> Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	
<input type="checkbox"/> Edit Del ...	Custom Marketing Profile	Salesforce	✓
<input type="checkbox"/> Edit Del ...	Custom Sales Profile	Salesforce	✓
<input type="checkbox"/> Edit Del ...	Custom Support Profile	Salesforce	✓
<input type="checkbox"/> Edit Clone	Customer Community Login User	Customer Community Login	
<input type="checkbox"/> Edit Clone	Customer Community Plus Login...	Customer Community Plus Login	
<input type="checkbox"/> Edit Clone	Customer Community Plus User	Customer Community Plus	
<input type="checkbox"/> Edit Clone	Customer Community User	Customer Community	
<input type="checkbox"/> Edit Clone	Customer Portal Manager Custom	Customer Portal Manager Custom	
<input type="checkbox"/> Edit Clone	Customer Portal Manager Standard	Customer Portal Manager Standard	
<input type="checkbox"/> Edit Clone	Einstein Agent User	Einstein Agent	
<input type="checkbox"/> Edit Clone	External Apps Login User	External Apps Login	
<input type="checkbox"/> Edit Clone	External Identity User	External Identity	
<input type="checkbox"/> Edit Clone	Force.com - App Subscription User	Force.com - App Subscription	
<input type="checkbox"/> Edit Clone	Force.com - Free User	Force.com - Free	

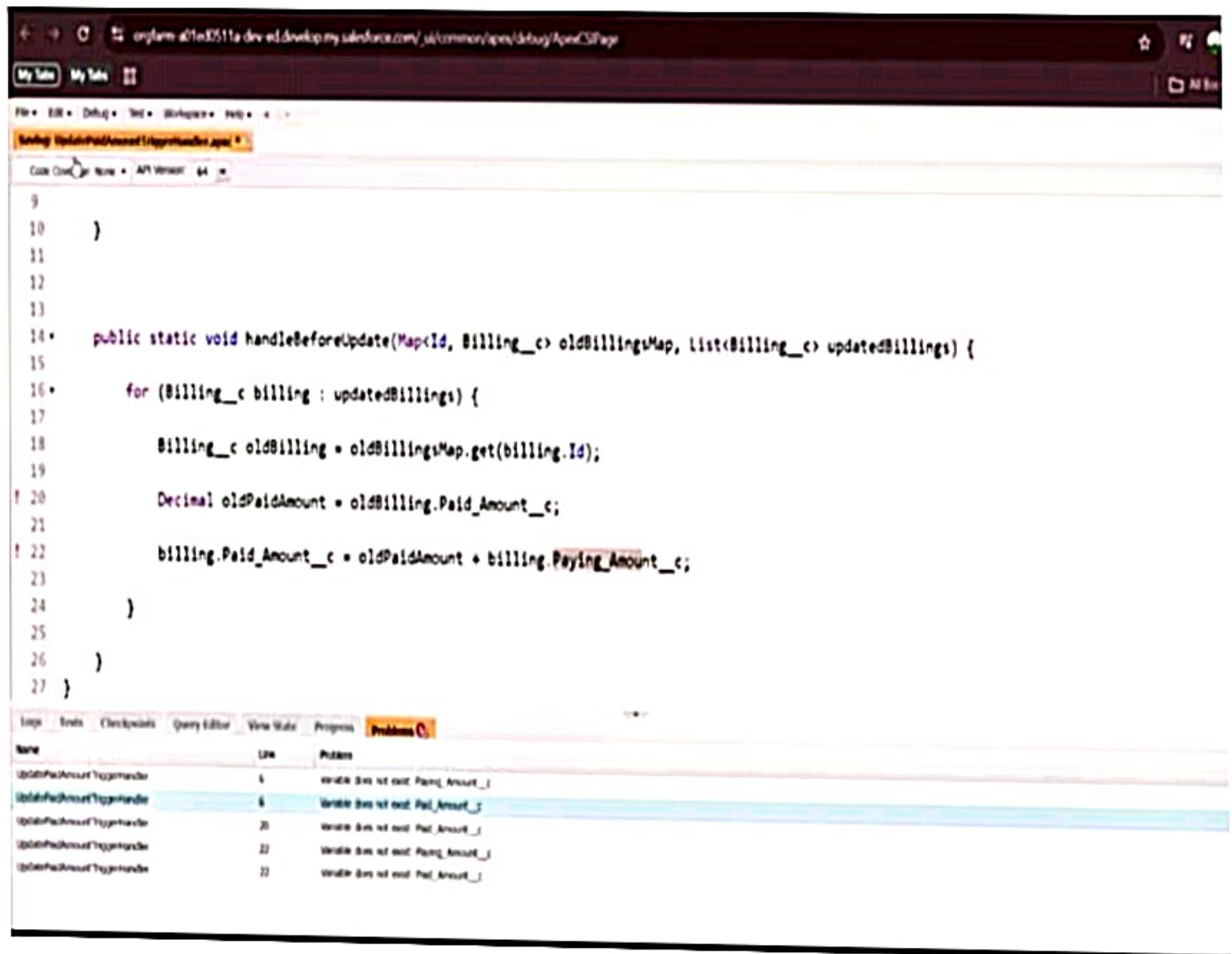
The lightning app – It is used to create a CRM Application for jewel management, which show as a dashboard in that it allows us to provide the data, reports, etc....,

Apex class – auto calculate total cost from order items.



```
1 public class UpdatePaidAmountTriggerHandler {
2     public static void handleBeforeInsert(List<Billing__c> newBillings) {
3         for (Billing__c billing : newBillings) {
4             billing.Paid_Amount__c = billing.Paying_Amount__c;
5         }
6     }
7
8     public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap, List<Billing__c> updatedBillings) {
9         for (Billing__c billing : updatedBillings) {
10             Billing__c oldBilling = oldBillingsMap.get(billing.Id);
11             billing.Paid_Amount__c = oldBilling.Paid_Amount__c + billing.Paying_Amount__c;
12         }
13     }
14 }
```

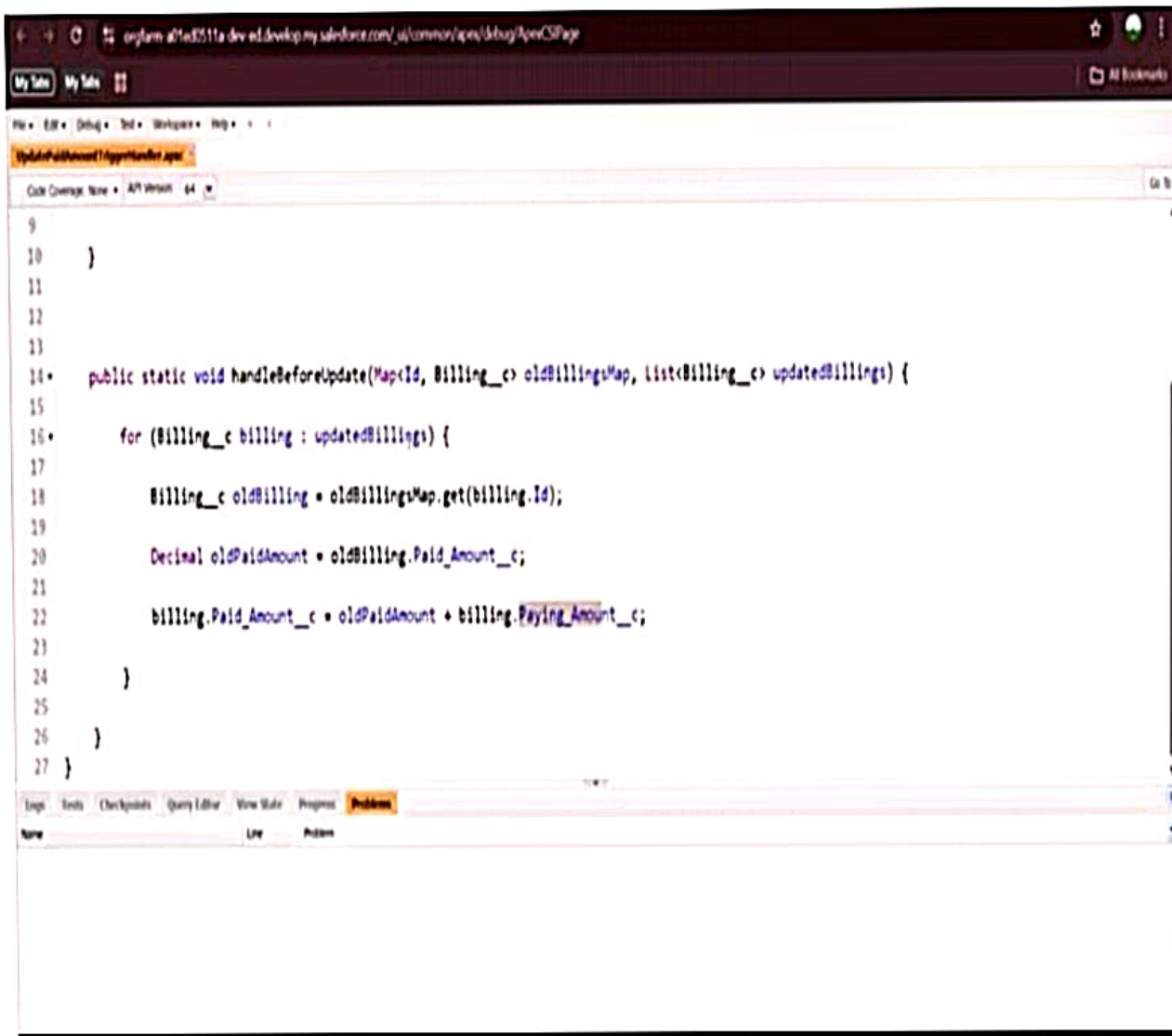
Apex trigger – auto calculate total cost from order item.



```
9
10 }
11
12
13
14 public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap, List<Billing__c> updatedBillings) {
15     for (Billing__c billing : updatedBillings) {
16         Billing__c oldBilling = oldBillingsMap.get(billing.Id);
17         Decimal oldPaidAmount = oldBilling.Paid_Amount__c;
18         billing.Paid_Amount__c = oldPaidAmount + billing.Paying_Amount__c;
19     }
20 }
21 }
```

Name	Line	Problem
UpdatePaidAmountTriggerHandler	6	Variable does not exist: Paid_Amount__c
UpdatePaidAmountTriggerHandler	6	Variable does not exist: Paid_Amount__c
UpdatePaidAmountTriggerHandler	20	Variable does not exist: Paid_Amount__c
UpdatePaidAmountTriggerHandler	22	Variable does not exist: Paid_Amount__c
UpdatePaidAmountTriggerHandler	22	Variable does not exist: Paid_Amount__c

Error handling: Resolved the issues “paying amount”, “paid amount” not found in the field, so create these fields.



```
9
10 }
11
12
13
14 public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap, List<Billing__c> updatedBillings) {
15
16     for (Billing__c billing : updatedBillings) {
17
18         Billing__c oldBilling = oldBillingsMap.get(billing.Id);
19
20         Decimal oldPaidAmount = oldBilling.Paid_Amount__c;
21
22         billing.Paid_Amount__c = oldPaidAmount + billing.Paying_Amount__c;
23
24     }
25
26 }
27 }
```

Result

Output screenshots to be inserted.

Permission sets: Permission sets in CRM Application for jewel management are used to give additional access to users to users without changing their profile. They allow specific staff to perform extra tasks like updating stock, purchase order, or viewing reports when needed.

Flows: flows in CRM Application for jewel management system are used to automate processes like updating stock after a purchase order, sending alerts for low inventory or expired stocks, and reducing manual work to improve accuracy and efficiency.



Search Setup

Setup

Home

Object Manager

Permission set

Users

Permission Set Groups

Permission Sets

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



SETUP

Permission Sets

Help for this Page

Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets Edit Delete Create New View

New

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

Action	Permission Set Name	Description	License
<input type="checkbox"/>	Clone (Legacy) Data Cloud Data Aware Spe	This Data Cloud permission set will b	Customer Data Platform
<input type="checkbox"/>	Clone (Legacy) Data Cloud Marketing Admin	Allows access to Data Cloud Setup if	Customer Data Cloud for Marketi
<input type="checkbox"/>	Clone (Legacy) Data Cloud Marketing Mana	This Data Cloud permission set will b	Customer Data Platform
<input type="checkbox"/>	Clone (Legacy) Data Cloud Marketing Spec	This Data Cloud permission set will b	Customer Data Platform
<input type="checkbox"/>	Clone (Legacy) Data Cloud for Marketing Da	This Data Cloud permission set will b	Customer Data Cloud for Marketi
<input type="checkbox"/>	Clone (Legacy) Data Cloud for Marketing M	This Data Cloud permission set will b	Customer Data Cloud for Marketi
<input type="checkbox"/>	Clone (Legacy) Data Cloud for Marketing Sp	This Data Cloud permission set will b	Customer Data Cloud for Marketi
<input type="checkbox"/>	Clone Access Agentforce Default Agent	Gives users access to the default Age	Agentforce (Default)
<input type="checkbox"/>	Clone Agent Platform Builder	Allow access to agent platform.	Agent platform builder
<input type="checkbox"/>	Clone Agentforce Default Admin	Allows users to build and manage in	Agentforce (Default)
<input type="checkbox"/>	Clone Agentforce Service Agent Configurati	Build and manage autonomous AI ser	Agentforce Service Agent Builder
<input type="checkbox"/>	Clone Agentforce Service Agent Object Acc	Access knowledge articles and mana	Agentforce Service Agent User
<input type="checkbox"/>	Clone Agentforce Service Agent Secure Base	Set up and use Agentforce Service Ag	Agentforce Service Agent User
<input type="checkbox"/>	Clone Agentforce Service Agent User	Analyze topics and perform actions a	Agentforce Service Agent User
<input type="checkbox"/>	Clone Authenticated Payer	An authenticated external user with t	Salesforce Payments External
<input type="checkbox"/>	Clone Buyer	Allows access to the store. Lets user	B2B Buyer Permission Set One Se
<input type="checkbox"/>	Clone Buyer Manager	Includes all Buyer capabilities, and all	B2B Buyer Manager Permission S
<input type="checkbox"/>	Clone C360 High Scale Flow Integration User	Allows integration user to access feat	Cloud Integration User
<input type="checkbox"/>	Clone CRM User	Denotes that the user is a Sales Clou	CRM User
<input type="checkbox"/>	Clone Code Builder User	Enables the user to create and acces	Code Builder
<input type="checkbox"/>	Clone Commerce Admin	Allow access to commerce admin fea	Commerce Admin Permission Set
<input type="checkbox"/>	Clone Commerce Session	Allow access to session-based perm	Commerce Session Permission S
<input type="checkbox"/>	Clone ConnectivityServiceCASCPermSet		Cloud Integration User
<input type="checkbox"/>	Clone Contact Center Admin	Manage Service Cloud Voice contact	Service Cloud Voice User
<input type="checkbox"/>	Clone Contact Center Admin (Partner Telep	Manage Service Cloud Voice contact	Service Cloud Voice User (Partne

Dashboard: Dashboard help you visually understand changing business

condition so you can make decision based on the real-time data you have gathered with reports.

elop.lightning.force.com

+

4

Search...

Jewellery Inventory ...

Jewel Customers

Items

Prices

Orders

Dashboards

More

Dashboard

dashboards 1

Refresh

Edit

Subscribe

Last refreshed 3 days ago. Refresh this dashboard to see the latest data.

As of Sep 2, 2025, 9:05 AM

Viewing as Renuga srl R

New Prices Report

Price: Price Id...	Gold Pri...	Price: ID
Price-01	\$312	a04gL000009Vqy1
Price-02	\$4	a04gL000009Vr2r
Price-03	\$5	a04gL000009Vr4T
Price-04	\$5	a04gL000009Vr65
Price-05	\$6	a04gL000009Vr7h
Price-06	\$5	a04gL000009VmmM
Price-07	\$5	a04gL000009Vr9J

View Report (New Prices ... As of Sep 2, 2025, 9:05 AM

Reports: Report give you access to your data.



elop.lightning.force.com



4



Search...



Jewellery Inventory ...

Jewel Customers ▾

Items ▾

Prices ▾

Orders ▾

Billings ▾

Reports ▾

More ▾



Report: Prices

New Prices Report

Enable Field Editing



Add Chart



Edit

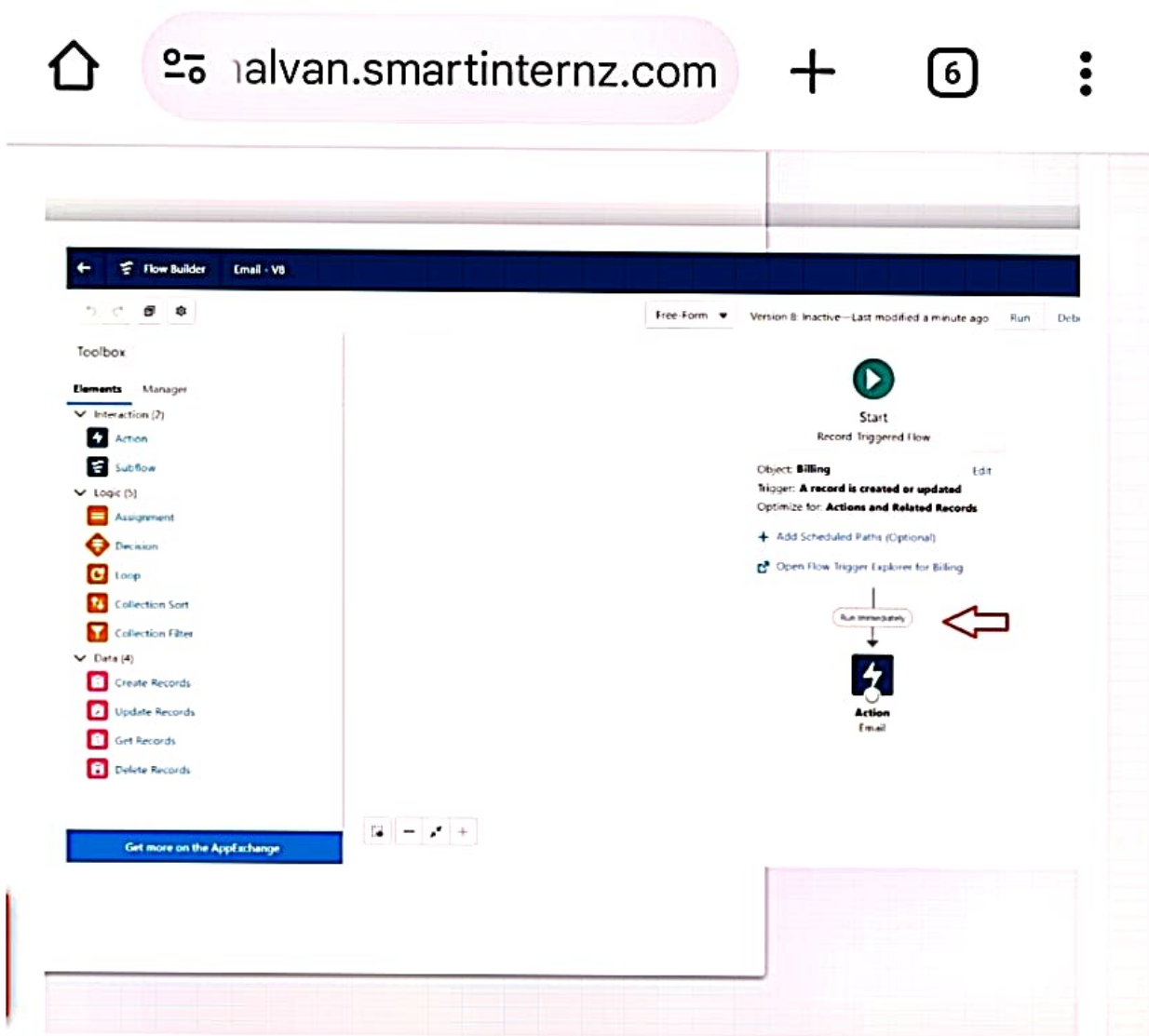


Total Records
10

Total Gold Price
\$358

	Price: Price Id ▾	Gold Price ▾	Price: ID ▾
1	Price-06	\$5	a04gL000009VmmM
2	Price-01	\$312	a04gL000009Vqy1
3	Price-02	\$4	a04gL000009Vr2r
4	Price-03	\$5	a04gL000009Vr4T
5	Price-04	\$5	a04gL000009Vr65
6	Price-05	\$6	a04gL000009Vr7h
7	Price-07	\$5	a04gL000009Vr9J
8	Price-08	\$8	a04gL000009VrAv
9	Price-09	\$5	a04gL000009VrCX
10	Price-10	\$3	a04gL000009VrE9
11		\$358	

Flows: A Flow is a powerful tool that allow you to automate business processes, collect and update data, and guide user through a series of screens or steps.



4. Advantages and disadvantage

Advantage

CRM helps manage customer data, allowing jewel to understand individual preferences and offer tailored recommendations and services, leading to a better customer experience.

The CRM With detailed customer profiles and buying history, jewel can identify profitable customer segments and create targeted marketing campaigns, increasing conversion rates.

CRM can integrate with inventory and sales systems, providing a consolidated view of stock and customer interactions, which streamlines operations.

Disadvantage

4. Advantages and disadvantage

Advantage

CRM helps manage customer data, allowing jewel to understand individual preferences and offer tailored recommendations and services, leading to a better customer experience.

The CRM With detailed customer profiles and buying history, jewel can identify profitable customer segments and create targeted marketing campaigns, increasing conversion rates.

CRM can integrate with inventory and sales systems, providing a consolidated view of stock and customer interactions, which streamlines operations.

Disadvantage

Implementing a CRM system can involve significant costs for software, customization, and initial training, which might be a barrier for smaller businesses.

Storing sensitive customer and inventory data in a centralized database raises concerns about potential breaches or unauthorized access, requiring strong security measures.

Staff may resist adopting new technology and workflows, especially if they are unfamiliar with the system or perceive it as a threat to their r

5. Conclusion

it is a business strategy and toolset for building strong, lasting customer relationships through centralized data, personalized experiences, and streamlined processes, ultimately driving growth, profitability, and customer loyalty. By providing valuable insights and automating tasks, CRM helps businesses foster trust, understand customer needs, and deliver superior value, making it a cornerstone of successful, customer-centric operations