

CRM APPLICATION FOR JEWEL MANAGEMENT

College Name :VET Institute of Arts & Science(co-education)

College Code:brubb

Team id:D8E58FAB1042F3EB6C54370098D13271

Team Size:5

Team LeaderName: DEVAPRASHANTH S

Email: devaprashanth23sit@vetias.ac.in

Team Member 1: DEEPAK SINGARAYAN V

Email: deepaksingarayanv23sit@vetias.ac.in

Team member 2: KAVIN S

Email: kavins23sit@vetias.ac.in

Team Member 3: KIRUBANITHI R

Email: kirubanithir23sit@vetias.ac.in

Team member 4: MANOJ KUMAR S

Email:manojkumars@vetias.ac.in

Title: CPM Application for Jewelry Management Using Salesforce...

Project Overview: Jewelry retailers often struggle with efficiently managing customer preferences, inventory levels, billing processes, and post-sale services. This project aims to develop a customized application using Salesforce CRM to simplify and automate these critical business functions.

The application is designed to enhance customer relationship management, monitor sales activities and streamline inventory operations within jewelry stores. By bringing together customers, sales representatives, and administrators on a unified platform, the system improves workflow efficiency and boosts overall customer satisfaction.

This integrated solution helps jewelry businesses deliver more personalized service, maintain accurate inventory records, and manage end-to-end sales processes effectively.

Objectives:

Customer Management: Create comprehensive customer profiles that capture purchase history, preferences, and loyalty rewards.

Inventory Tracking: Keep real-time visibility on stock levels to avoid both shortages and excess inventory.

Sales Automation: Simplify processes by automating quote creation, billing, and follow-up alerts.

Analytics & Reporting: Produce insightful dashboards and reports covering sales performance, customer behavior, and revenue metrics.

Operational Efficiency: Optimize workflows for sales teams and managers to save time and minimize errors.

Enhanced Customer Engagement: Deliver tailored offers and notifications to boost customer loyalty and satisfaction.

Student Outcomes:

Hands-on Salesforce Development: Build practical skills in designing custom objects, fields, relationships, workflows, and triggers tailored to the specific needs of the jewelry industry.

End-to-End CRM Project Understanding: Gain a thorough understanding of the entire project process, from collecting requirements to deploying a solution in a real business environment.

Analytical & Problem-Solving Skills: Enhance the capability to assess business problems and create effective Salesforce-based solutions.

Collaboration & Documentation Skills: Engage in teamwork to plan, develop, test, and thoroughly document CRM features and functionalities.

Industry Exposure: Learn how Salesforce CRM is applied within the retail and luxury sectors, helping to prepare for career opportunities in these fields.

Practical Experience with Dashboards & Reports: Acquire expertise in creating visual dashboards and reports that assist in decision-making related to sales and customer management.

System Requirements:

Hardware Requirements:

- A computer with at least 4 GB of RAM and a dual-core processor
- Reliable and stable internet connectivity

Software Requirements:

- Salesforce Developer Edition account
- Up-to-date web browser such as Google Chrome, Firefox, or Microsoft Edge

Project Duration:31 hours

Phase Overview

Phase no	Phase Name	Description	Page No
1	Requirement Analysis & Planning	Gathering requirements from customers, service advisors, mechanics, and managers; defining scope and goals; planning data model and workflows	5
2	Salesforce Development – Backend & Configurations	Creating custom objects, fields, and relationships; setting up Flows and Apex Triggers for service job automation and inventory tracking.	5-12
3	UI/UX Development & Customization	Building Lightning App, customizing layouts, adding fields for vehicle details, service history, and implementing UI logic and Flows.	12-26
4	Data Migration, Testing & Security	Creating Users, Profiles, Public Groups, Sharing Rules; configuring Report Types, Reports, Dashboards; testing functionalities and ensuring data security.	26-37
5	Deployment, Documentation & Maintenance	Designing and finalizing Home Page, deploying the garage system to the live environment, preparing documentation, conclusion, and ongoing maintenance.	37-45

Phase 1: Requirement Analysis & Planning

JEWELLERY MANAGEMENT

By utilizing Salesforce, this project improves jewelry business operations through efficient inventory control, customer management, and order handling — delivering accuracy, productivity, and complete visibility across all processes.

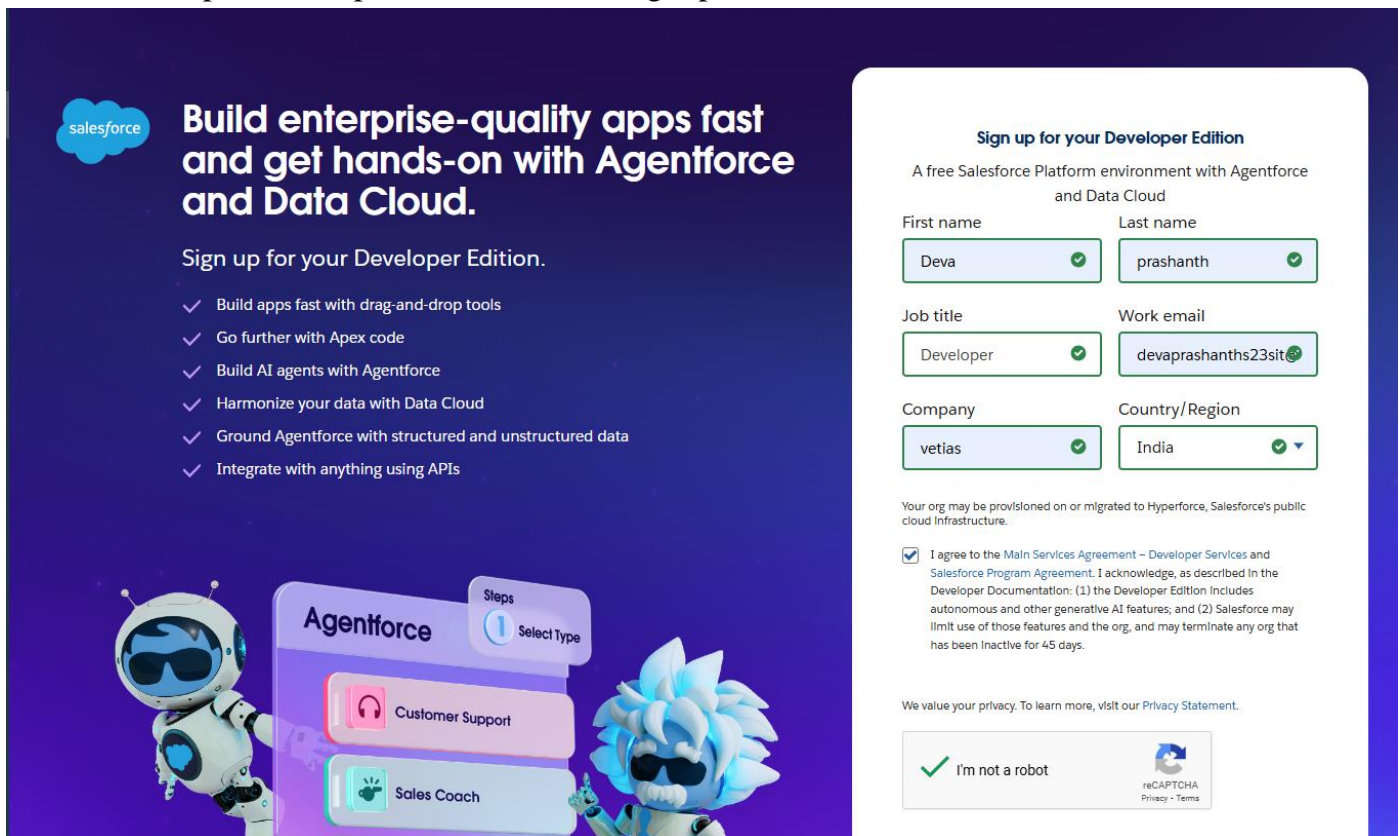
Phase 2: Salesforce Development – Backend & Configurations

Milestone 1: Salesforce developer account creation

ACTIVITY 1: Creating Developer Account

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>



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: Deva ✓ Last name: prashanth ✓


Job title: Developer ✓ Work email: devaprashanth23sit ✓

Company: vetias ✓ 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.

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

☒ I'm not a robot 

2. On the sign up form, enter the following details :

1. First name & Last name
2. Email
3. Role : Developer

4. Company : College or Company Name

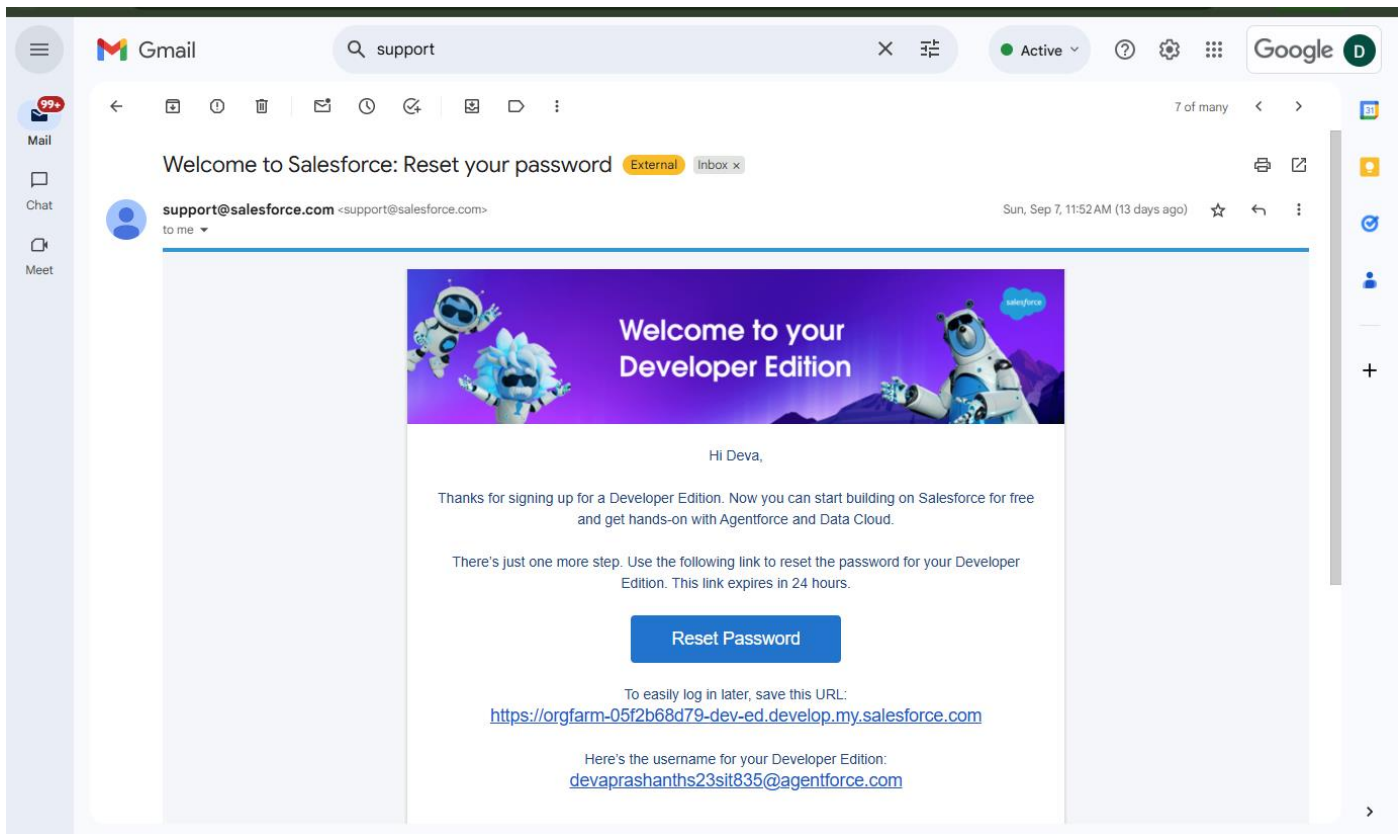
5. County : India

6. Postal Code : pin code

7. Username : should be a combination of your name and company

ACTIVITY 2:Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the Reset Password to activate your account. The email may take 5-10mins.
2. Click on Reset Password
3. Give a password and answer a security question and click on change password.



4. Then you will redirect to your salesforce setup page.

Milestone 2:OBJECTS

ACTIVITY 1:CREATE JEWELLERY CUSTOM OBJECTS

1. Go to Setup
 - Click the gear icon (top right corner).
 - Click "Setup."
2. Open Object Manager
 - In the Setup page, click "Object Manager" (top menu).
3. Create New Custom Object
 - Click "Create" → then click "Custom Object."

4. Enter Object Details
 - Label Name: Jewel Customer

- Plural Label: Jewel Customers
- 5. Set Record Name
 - Record Name: Customer name
 - Data Type: Text
- 6. Check These Options
 - Allow Reports
 - Allow Search
- 7. Click Save

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the breadcrumb trail reads 'SETUP > OBJECT MANAGER' and the page 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, List View Button Layout, and Restriction Rules. The main content area is titled 'Edit Custom Object: Jewel Customer' and contains the 'Custom Object Definition Edit' form. This form includes sections for 'Custom Object Information' (with fields for Label, Plural Label, and Starts with vowel sound) and 'Object Name' (with a field for the API name). There are also checkboxes for 'Context-Sensitive Help Setting' and a 'Content Name' dropdown. At the bottom, a note states 'Enter Object Name, Label and Example'.

ACTIVITY 2:CREATE ITEM OBJECT

- 1.Go to Setup
 - Click the gear icon (top right)
 - Select "Setup"
2. Open Object Manager
 - Click on "Object Manager" (top menu)
3. Create a New Custom Object
 - Click "Create"
 - Choose "Custom Object"
4. Enter Object Details

- Label Name: Item
- Plural Label: Items

5. Set Record Name

- Record Name: Item Id
- Data Type: Auto Number
- Display Format: Item{00}
- Starting Number: 1

6. Check These Options

- Allow Reports
- Allow Search

7. Click

Save

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar labeled 'Search Setup'. Below it, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Item' and contains a sidebar with various configuration options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The main panel is 'Custom Object Definition Edit' for the 'Item' object. It includes fields for 'Label' (Item), 'Plural Label' (Items), 'Object Name' (Item), and a 'Description' text area. There are also checkboxes for 'Starts with vowel sound' and 'Context-Sensitive Help Setting', and a 'Content Name' dropdown menu.

Milestone 3: TABS

ACTIVITY 1: CREATING A CUSTOM TABS

1. Go to Setup

- Click the gear icon (top right)
- Click "Setup"

2. Search for Tabs

- In the Quick Find search bar (left side), type "Tabs"

- Click on "Tabs" from the results

3. Create a New Tab

- Find "Custom Object Tabs" section
- Click on the "New" button

4. Fill in Tab Details

- Select Object: Choose "Jewel Customer"
- Tab Style: Pick any icon/style you like (e.g., Diamond, Star)

5. Click Next

- Leave the Add to Profiles page as default
- Click Next again to go to the Custom App page
- Leave this as default too

6. Click Save

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Tabs' is selected under 'User Interface'. The main content area is titled 'Edit Custom Object Tab: Jewel Customers'. Below this, there's a section 'Custom Tab Definition Edit' with a sub-section 'Custom Object Tab Information'. This section contains fields for 'Tab Label' (Jewel Customers), 'Object' (Jewel Customer), and 'Tab Style' (Diamond). There's also an optional field for 'Splash Page Custom Link' set to 'None'. At the bottom, there's a 'Description' field and 'Save' and 'Cancel' buttons.

ACTIVITY 2: TO CREATE A TAB: (ITEM)

1. Go to Setup

- Click the gear icon (top right)
- Click "Setup"

2. Search for Tabs

- In the left search bar (Quick Find), type "Tabs"
- Click on "Tabs"

3. Create a New Tab

- Under "Custom Object Tabs", click "New"

4. Select Object

- From the dropdown, choose "Item"

5. Choose a Tab Style

Pick any icon you like (e.g., box, gold bar, etc.)

6. Click Next (twice)

- Keep everything default on both pages:
 - Add to Profiles page → Default
 - Add to Custom App page → Default
- 7. Click Save

app manager

Setup Home Object Manager

Lightning Experience App Manager

New Lightning App New External Client App

27 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

	App Name ↑	Developer Name	Description	Last Modified ...	App T...	Visi...
1	All Tabs	AllTabSet		8/27/2025, 4:40 PM	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	8/27/2025, 4:40 PM	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	8/27/2025, 4:40 PM	Classic	✓
4	Approvals	Approvals	Manage approvals and approval flows	8/27/2025, 4:40 PM	Lightning	✓
5	Automation	FlowsApp	Automate business processes and repetitive tasks.	8/27/2025, 4:47 PM	Lightning	✓
6	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	8/27/2025, 4:40 PM	Lightning	✓
7	Community	Community	Salesforce CRM Communities	8/27/2025, 4:40 PM	Classic	✓
8	Content	Content	Salesforce CRM Content	8/27/2025, 4:40 PM	Classic	✓
9	Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	8/27/2025, 4:40 PM	Lightning	✓
10	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	8/27/2025, 4:40 PM	Lightning	✓
11	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	8/27/2025, 4:40 PM	Lightning	✓
12	Jewellery Inventory System	Jewellery_Inventory_System	Elevate your look with elegance	9/1/2025, 7:46 AM	Lightning	✓
13	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	8/27/2025, 4:40 PM	Lightning	✓

PHASE 3: UI/UX Development & Customization

Milestone 4: The Lightning App

ACTIVITY 1:CREATE A LIGHTNING APP

1. Go to Setup

- Click the gear icon (top right)
- Click "Setup"

2. Search for App Manager

- In the Quick Find bar (left side), type: App Manager
- Click on "App Manager"

3. Create New Lightning App

- Click the "New Lightning App" button (top right)

Search Setup

Setup Home Object Manager

app manager

Apps

App Manager

External Client Apps

External Client App Manager

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

27 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

	App Name ↑	Developer Name	Description	Last Modified ...	App T...	Visi...	
1	All Tabs	AllTabSet		8/27/2025, 4:40 PM	Classic	✓	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	8/27/2025, 4:40 PM	Classic	✓	
3	App Launcher	AppLauncher	App Launcher tabs	8/27/2025, 4:40 PM	Classic	✓	
4	Approvals	Approvals	Manage approvals and approval flows	8/27/2025, 4:40 PM	Lightning	✓	
5	Automation	FlowsApp	Automate business processes and repetitive tasks.	8/27/2025, 4:47 PM	Lightning	✓	
6	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	8/27/2025, 4:40 PM	Lightning	✓	
7	Community	Community	Salesforce CRM Communities	8/27/2025, 4:40 PM	Classic	✓	
8	Content	Content	Salesforce CRM Content	8/27/2025, 4:40 PM	Classic	✓	
9	Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	8/27/2025, 4:40 PM	Lightning	✓	
10	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	8/27/2025, 4:40 PM	Lightning	✓	
11	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	8/27/2025, 4:40 PM	Lightning	✓	
12	Jewellery Inventory System	Jewellery_Inventory_System	Elevate your look with elegance	9/1/2025, 7:46 AM	Lightning	✓	
13	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	8/27/2025, 4:40 PM	Lightning	✓	

https://orcfarm-b16d973c31-dev-ed.developer.lightning.force.com/lightning/setup/NavigationMenu/home

4. App Details & Branding

- App Name: Jewellery Inventory System
- Developer Name: (This fills in automatically)
- Description: Elevate your look with elegance
- Image: (Optional – you can skip this)
- Primary Colour: Leave it as default
- Click Next

5. App Options

- Navigation Style: Choose Console Navigation

- Click Next

6. Utility Items

- Keep everything default
- Click Next

7. Add Navigation Items

Now add the tabs you want to see in the app menu:

- In the Search bar, type and find the following one by one:
 - Jewel Customer
 - Item
 - Customer Order
 - Price
 - Bill
 - Reports
 - Dashboard
- Select each one and click the right arrow to move them to the selected list
- Click Next

8. Assign User Profiles

- In the search bar, type: System Administrator
- Select it and click the right arrow to add it, save & finish

Milestone 5 : FIELDS

ACTIVITY 1: CREATING LOOKUP RELATIONSHIP

1. Go to Setup

- Click the gear icon (top right)
- Click "Setup"

2. Open Object Manager

- In the Quick Find bar, type: Customer Order
- Click on the Customer Order object from the list

3. Go to Fields & Relationships

- Click on "Fields & Relationships"

- Click on the "New" button

4. Choose Relationship Type

- Select "Lookup Relationship"
- Click Next

1. Go to <https://developer.salesforce.com/signup>

5. Select Related Object

- From the list, choose: Jewel Customer
- Click Next

6. Set Field Details

- Field Label: Type Customer
- Click Next → Click Next again

7. Save

- Click Save to finish

ACTIVITY 2: Creating a Master-Detail Relationship

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

Setup Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Customer Order

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 Customer Order Custom Field

Item

Have feedback on lookup filters? Comment on IdeaExchange! Help for this Page

Custom Field Definition Edit Change Field Type Save Cancel

Field Information Required Information

Field Label Item Data Type Master-Detail

Field Name Item

Description

Help Text

Data Owner User

Field Usage --None--

Data Sensitivity Level --None--

Compliance Categorization

Available PII HIPAA GDPR PCI Chosen

Master-Detail Options

ACTIVITY 3: Creating Text Field in Jewel Customer Object

Student Jewel Customer | Salesforce

orgfarm-41f82b94ed-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gl000001maDV/FieldsAndRelationships/00NgL00001O0PMp/view

Setup 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

Jewel Customer Custom Field

City

Back to Jewel Customer

Validation Rules [0]

Custom Field Definition Detail Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	City	Object Name	Jewel Customer
Field Name	City	Data Type	Text
API Name	City__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Sanathani V.S.	Modified By	Sanathani V.S.
	8/28/2025, 7:17 AM		8/28/2025, 7:17 AM

90°F Mostly cloudy Search ENG IN 12:20 PM 8/31/2025

ACTIVITY 4: Creating the Phone field in object Jewel Customer

Setup Home Object Manager

SETUP > OBJECT MANAGER

Price

Details

Fields & Relationships
6 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Gold Price	Gold_Price__c	Currency(8, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Price Id	Name	Auto Number		✓
Silver Price	Silver_Price__c	Currency(8, 5)		

javascript:void(0);

ACTIVITY 5: Creating the Email field in object Jewel Customer

Student Jewel Customer | Salesforce

orgfarm-41f82b94ed-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gL000001maDV/FieldsAndRelationships/00NgL00001O2dGc/view

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

Jewel Customer Custom Field

Email

Back to Jewel Customer

Validation Rules [0]

Custom Field Definition Detail Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Email	Object Name	Jewel Customer
Field Name	Email	Data Type	Email
API Name	Email__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Sanathani V.S. 8/28/2025, 7:20 AM	Modified By	Sanathani V.S. 8/28/2025, 7:20 AM

90°F Mostly cloudy 12:21 PM 8/31/2025

ACTIVITY 6: Creating Remaining Fields in Objects

The screenshot shows the Salesforce Setup interface for the 'Item' object. The 'Fields & Relationships' section is active, displaying a list of 23 fields. The fields are sorted by Field Label. The table below lists the fields and their details:

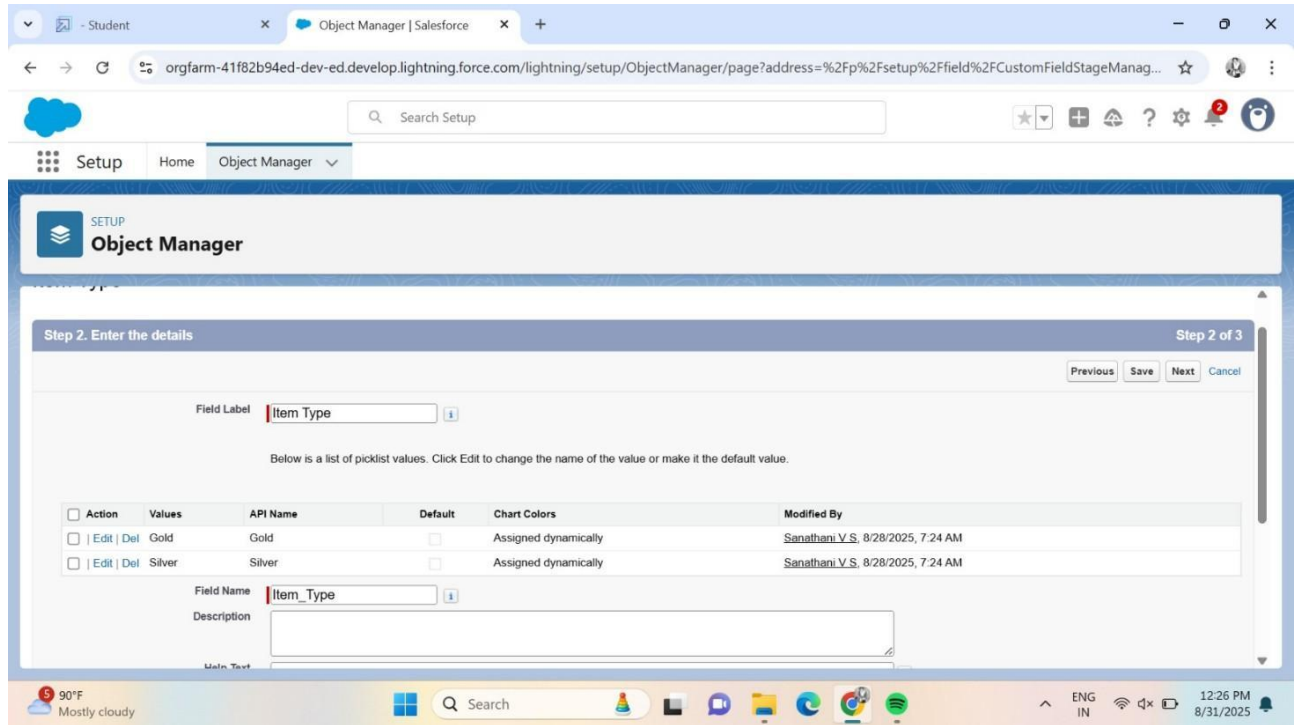
Field Label	Field Name	Data Type	Field Type
item_type	item_type_c	Picklist	Picklist
KDM	KDM_c	Formula (Currency)	Formula
Last Modified By	LastModifiedById	Lookup(User)	Lookup
Making Charges	Making_Charges_c	Formula (Currency)	Formula
Ornament	Ornament_c	Text(20)	Text
Owner	OwnerId	Lookup(User,Group)	Lookup
Percentage	Percentage_c	Number(2, 0)	Number
Prices	Prices_c	Lookup(Price)	Lookup
Priority	Priority_c	Picklist	Picklist

ACTIVITY 7: Creating the number field in Item object

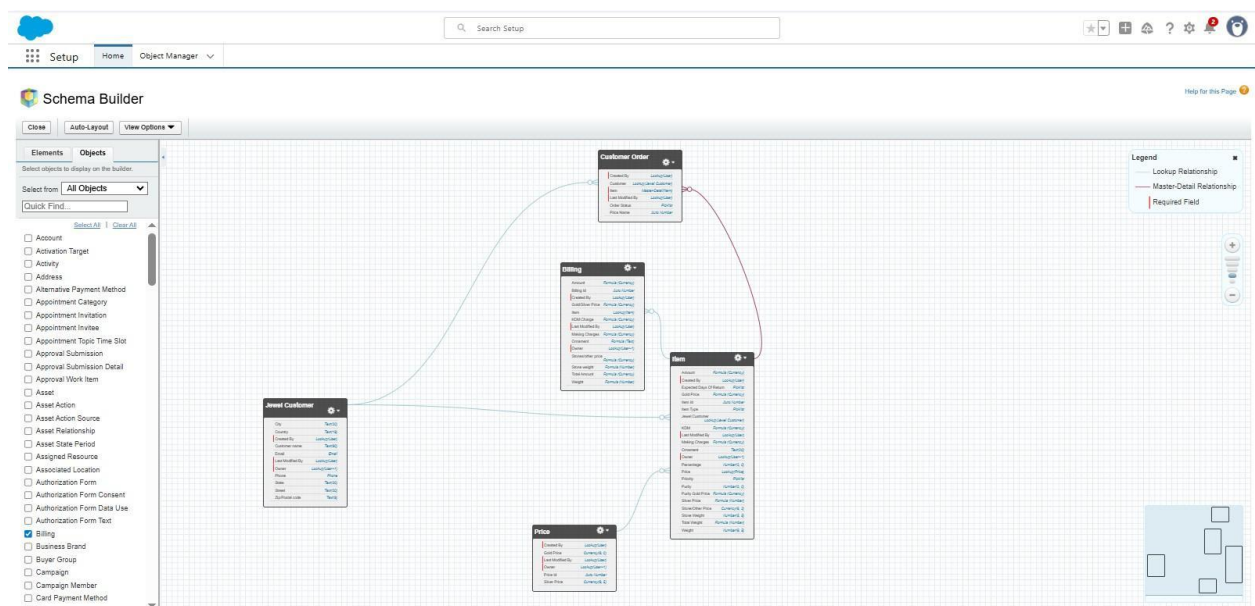
The screenshot shows the Salesforce Setup interface for the 'Item' object, specifically the 'Custom Field Definition Detail' page for a new custom field named 'Purity'. The field is of type 'Number'.

Field Information	Field Label	Field Name	API Name	Description	Help Text	Data Owner	Field Usage	Data Sensitivity Level	Compliance Categorization	Created By	Created Date	Modified By	Modified Date
Purity	Purity	Purity_c								Sanathani V.S.	8/28/2025, 7:22 AM	Sanathani V.S.	8/28/2025, 7:22 AM

ACTIVITY 8: Creating Picklist Field in Item Object



ACTIVITY 9:Schema Builder



ACTIVITY 10:Creating the Field Dependencies

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

Field Dependencies

Action	Dependent Field	Data Type	Modified By
Edit Del	Expected Days Of Return	Picklist	Sanathani V.S. 8/30/2025, 10:42 AM

Validation Rules

No validation rules defined.

Values

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Low	Low	<input type="checkbox"/>	Assigned dynamically	Sanathani V.S. 8/28/2025, 8:34 AM
Edit Del Deactivate	Medium	Medium	<input type="checkbox"/>	Assigned dynamically	Sanathani V.S. 8/28/2025, 8:34 AM
Edit Del Deactivate	High	High	<input type="checkbox"/>	Assigned dynamically	Sanathani V.S. 8/28/2025, 8:34 AM
Edit Del Deactivate	Critical	Critical	<input type="checkbox"/>	Assigned dynamically	Sanathani V.S. 8/28/2025, 8:34 AM

ACTIVITY 11: Creating The Validation Rules

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

Jewel Customer Validation Rule

[Back to Jewel Customer](#)

Validation Rule Detail

Rule Name	Postal_Code	Active	<input checked="" type="checkbox"/>
Error Condition Formula	AND(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"		
Description			
Created By	Deva prashanth 9/7/2025, 1:52 AM		
Modified By	Deva prashanth 9/7/2025, 1:52 AM		

Milestone 6: PROFILES

ACTIVITY 1:Gold Smith Profile

Grant Custom Object Permission:

- Scroll down to the section called Custom Object Permissions.
- Give access (Check the boxes) for the following objects:

- Jewel Customer
- Item
- Customer Order
- Prices
- Billings

ACTIVITY 2: Worker Profile

1. Go to Profiles:
 - In Salesforce, go to the Setup menu (the gear icon).
 - In the search box, type Profiles and click on it.
2. Clone a Profile:
 - Find the Salesforce Platform User profile (or any profile you want to copy).
 - Click on the profile and press Clone.
 - Give the new profile a name.
 - Click Save.
3. Edit the Profile:
 - After saving, click Edit on the profile page.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'profile' entered and a 'Profiles' link under the 'Users' section. The main content area is titled 'Profiles' and shows the details for the 'Gold Smith' profile. The profile is a 'Custom Profile' and was created by 'Deva prashanth' on 9/7/2025. Below the profile details, there is a section for 'Page Layouts' which lists various standard object layouts and their assigned page layouts, each with a 'View Assignment' link.

Profile Detail

Name	Gold Smith	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce		
Description			
Created By	Deva prashanth, 9/7/2025, 2:00 AM	Modified By	Deva prashanth, 9/7/2025, 3:09 AM

Page Layouts

Standard Object Layouts	Global	Location Group	Macro	Object Milestone	Operating Hours	Opportunity	Opportunity Product	Order
Email Application	Global Layout [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]	Macro Layout [View Assignment]	Object Milestone Layout [View Assignment]	Operating Hours Layout [View Assignment]	Opportunity Layout [View Assignment]	Opportunity Product Layout [View Assignment]
Home Page Layout	Not Assigned [View Assignment]							
Account	Account Layout [View Assignment]							
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]							
Appointment Invitation	Appointment Invitation Layout [View Assignment]							
Asset	Asset Layout [View Assignment]							
Asset Action	Asset Action Layout [View Assignment]							

4. Grant Permissions:

- Scroll down to Custom Object Permissions.
- Find the objects: Items, Price, and Customer Order.

- Select the permissions you want to give (e.g., Read, Create, etc.).
5. Save Your Changes:
- After selecting the permissions, scroll down and click Save.

Milestones 7:ROLES

ACTIVITY 1:Changing Gold Smith Roles

- Go to Setup:
 - In Salesforce, go to the Setup area (top-right corner).
- Search for Roles:
 - In the Quick Find box, type Roles and click on Roles under the "User Management" section.
- Set Up Roles:
 - On the Roles page, click on Set Up Roles (you might see a button or a link).
- Expand All:
 - Click on Expand All to see all the roles and structure.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'roles' entered and a navigation menu with categories like Users, Feature Settings, Sales, Service, and Case Teams. The main content area is titled 'Roles' and shows details for the 'CEO' role. It includes a description, hierarchy, and a table of role details. Below the table is a section for 'Users in CEO Role' with buttons for 'Assign Users to Role' and 'New User'.

Role: CEO

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: vetias » CEO
Siblings:

Users in CEO Role [0]

Role Detail	
Label	CEO
This role reports to	None
Modified By	Deva prashanth, 9/12/2025, 1:37 AM
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases

Role Name: CEO
Role Name as displayed on reports: CEO
Sharing Groups: Role, Role and Internal Subordinates

Users in CEO Role

Assign Users to Role New User

No records to display

- Add a New Role:

- Click on Add Role under the section that shows where this new role will fit into the role hierarchy.
6. Enter Role Details:

- Label: Type in Gold Smith (this is the name of the role).
 - The Role Name will automatically populate based on the label.
 - Reports To: Select the role to whom this Gold Smith role will report (this can be someone higher in the hierarchy like a manager or admin).
7. Save:
- Once you've filled out the details, click Save to create the new Gold Smith role.

ACTIVITY 2: Create One More Role As Worker Which Reports To Gold Smith

1. Go to Setup:
 - In Salesforce, go to the Setup area (top-right corner).
2. Search for Roles:
 - In the Quick Find box, type Roles and click on Roles under the "User Management" section.
3. Set Up Roles:
 - On the Roles page, click on Set Up Roles (you'll see a link or a button).
4. Expand All:
 - Click on Expand All to see all the roles and their hierarchy.
5. Add a New Role:
 - Click on Add Role under the section where you want to place the Worker role (it will be below the Gold Smith role).
6. Enter Role Details:
 - Label: Type in Worker (this is the name of the new role).
 - The Role Name will automatically fill in based on the label.
 - Reports To: From the dropdown, select Gold Smith (this makes the Worker role report to Gold Smith).
7. Save:
 - Once you've filled out the details, click Save to create the Worker role.

The screenshot shows the Salesforce Setup interface for the 'Roles' section. The left sidebar contains a search bar with 'roles' and a navigation menu with 'Users' selected, showing 'Roles' as the active item. The main content area displays the 'Role Detail' for the 'CEO' role. It includes a description of the role, a list of users assigned to the role (currently empty), and a table of role details. The table includes fields for Label, Role Name, Role Name as displayed on reports, Modified By, Opportunity Access, and Case Access. Below the table is a section for 'Users in CEO Role' with buttons for 'Assign Users to Role' and 'New User'.

PHASE 4: Data Migration, Testing & Security

Milestone 8:USERS

ACTIVITY 1:Create User

1. Go to Users:
 - In Salesforce, go to the Setup menu (the gear icon).
 - In the search box, type Users and click on Users.
2. Create a New User:
 - On the Users page, click the New User button.
3. Fill in the Details:
 - First Name: Enter Niklaus.
 - Last Name: Enter Mikaelson.
 - Alias: Give a short name, like Nik or anything you prefer.
 - Email: Enter your personal email address.

- Username: This should be in this format: text@text.text (e.g., niklaus.m@example.com).
- Nickname: Enter a short nickname for the user (e.g., Nik).
- Role: Select Gold Smith as the role.
- User License: Choose Salesforce.

- Profile: Select the Gold Smith profile.

The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with categories like Users, Feature Settings, Data.com, Service, Embedded Service, and User Interface. The 'Users' section is expanded, showing options like Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The 'Users' link is highlighted. The main content area shows the 'User Detail' page for 'Niklaus Mikaelson'. At the top, there's a search bar and a 'Search Setup' button. Below the user name, there are links for various settings like Permission Set Assignments, Activation Required, License Assignments, Personal Groups, Public Group Membership, Queue Membership, Team, Managers in the Role Hierarchy, OAuth Apps, Third-Party Account Links, Built-in Authenticators, Installed Mobile Apps, Authentication Settings for External Systems, Login History, and User Provisioning Accounts. The 'User Detail' section includes buttons for Edit, Sharing, Reset Password, Freeze, and View Summary. The user's information is displayed in a table-like format with two columns. The first column contains fields like Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, and Manager. The second column contains fields like Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), and Debug Mode. The user's role is 'Gold Smith', user license is 'Salesforce', and profile is 'Gold Smith'. The 'Active' checkbox is checked. The 'Marketing User' checkbox is unchecked. The 'Offline User' checkbox is unchecked. The 'Knowledge User' checkbox is unchecked. The 'Flow User' checkbox is unchecked. The 'Service Cloud User' checkbox is unchecked. The 'Site.com Contributor User' checkbox is unchecked. The 'Site.com Publisher User' checkbox is unchecked. The 'WDC User' checkbox is unchecked. The 'Mobile Push Registrations' link is 'View'. The 'Data.com User Type' dropdown is set to '1'. The 'Accessibility Mode (Classic Only)' dropdown is set to '1'. The 'Debug Mode' checkbox is unchecked. The 'Receive Approval Request Emails' field is set to 'Only if I am an approver'.

4. Save:

- Once you've filled in all the fields, click Save to create the user.

ACTIVITY 2: Create User

1. Go to Setup:

- In Salesforce, click on Setup (top-right corner).

2. Search for Users:

- In the Quick Find box, type Users and click on Users under the "User Management" section.

3. Create New User:

- On the Users page, click on New User (usually a button at the top of the page).

The screenshot shows the Salesforce Setup interface. On the left, the 'Users' section is expanded in the navigation menu. The main area displays the 'User Detail' form for a user named 'kol Mikaelson'. The form is divided into two columns. The left column contains fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, and Manager. The right column contains fields for Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode, and Debug Mode. The 'Role' is set to 'Worker' and the 'User License' is 'Salesforce'. The 'Active' checkbox is checked.

4. Fill in the User Details:

- First Name: Type Kol.
- Last Name: Type Mikaelson.
- Alias: Enter an alias (a short name, like KolM or K.M).
- Email ID: Enter your personal email address (for example, kol.m@example.com).
- Username: Enter a username in this format: kol.mikaelson@example.com.
- Nickname: Enter a nickname (like Kol or KM).
- Role: Choose Worker (from the dropdown).
- User License: Select Salesforce Platform.
- Profile: Choose Worker (from the dropdown).

5. Save:

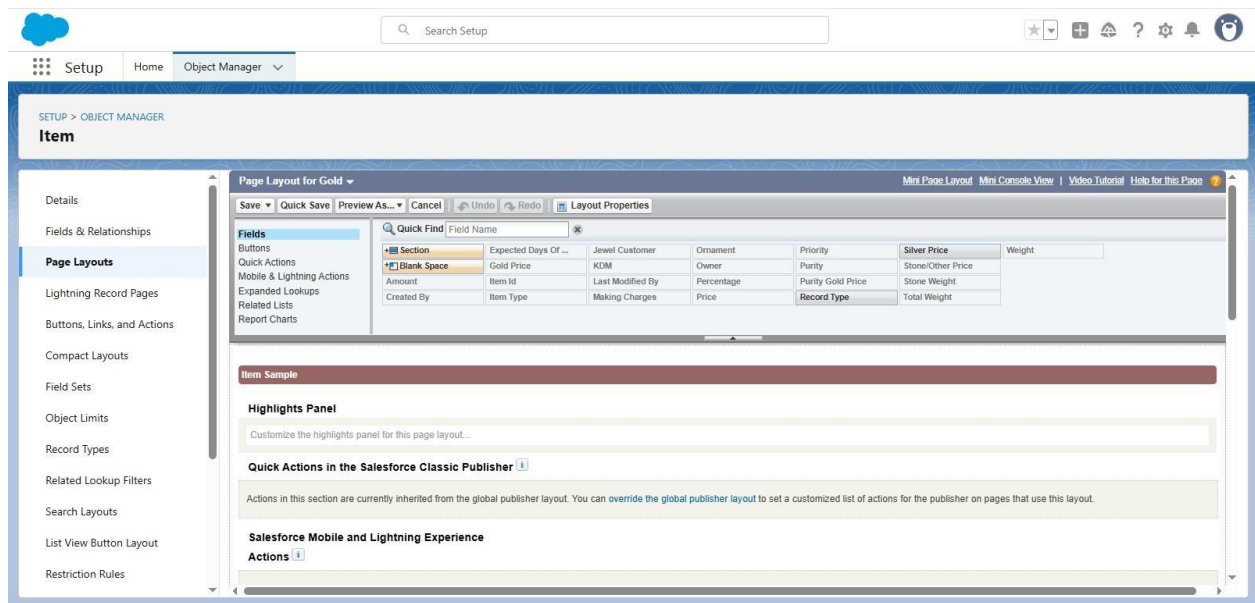
- After filling in the details, click Save to create the user.

PHASE 4: Data Migration, Testing & Security

Milestone:8 PAGE LAYOUT

ACTIVITY 1:To Create A Gold Page layout

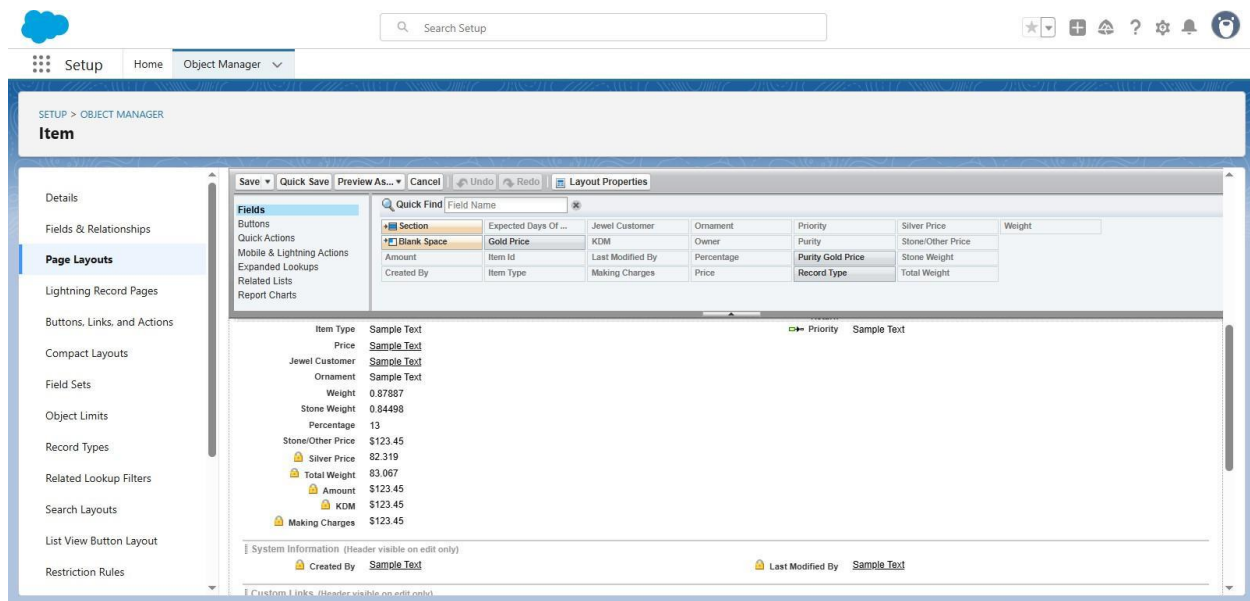
1. Go to Setup:
 - In Salesforce, click the gear icon in the top-right corner, then click Setup.
2. Find Object Manager:
 - In the left-hand search box, type Object Manager and click on it.
3. Search for the Object:
 - In the Object Manager page, type Item (or the name of your object) in the search bar and click on it.
4. Edit the Object:
 - In the Item object page, click Edit in the dropdown.
5. Create a New Page Layout:
 - Click on Page Layouts on the left side.
 - Now, click the New button to create a new layout.



6. Name the Layout:
 - In the pop-up window, name your new layout "Page Layout for Gold".
 - Then, click Save and New.
7. Save the Layout:
 - Once you've made all changes and arranged the fields, click Save.

ACTIVITY 2: To Create A Silver Plate Layout

1. Go to Setup:
 - Click the gear icon at the top-right of Salesforce.
 - Select Setup from the dropdown.
2. Find Object Manager:
 - In the Quick Find box on the left, type Object Manager and click on it.
3. Edit the Object:
 - Once on the Item page, click the dropdown next to it and select Edit.
4. Create a New Page Layout:
 - In the left sidebar, click on Page Layouts.
 - Click the New button to create a new layout.



5. Name the Layout:
 - When the pop-up appears, name your layout "Page Layout for Silver".
 - Then, click Save.
6. Arrange the Fields:
 - Now, you'll see the layout editor. Arrange the fields as shown in the Information Section (based on your requirements).
 - Remove the fields related to Gold by clicking on the "X" next to them (or using the Remove button).
 - After adjusting everything, click OK.
7. Save the Layout:
 - When you're done, click Save to finalize the layout.

Milestone 9:PAGE LAYOUT

Activity 1: Create a Record Type for Gold

1. Go to Setup

- Click the gear icon in the top-right corner of Salesforce.
- Select Setup from the dropdown.

2. Find the Object

- In the Quick Find box on the left, type the name of your object (e.g., Item) and click on it.

3. Create a New Record Type

- On the left sidebar, click Record Types.
- Click New to create a new record type.

4. Fill in Record Type Details

- Select Existing Record: Choose Master (this is the default record type for the object).
- Record Type Label: Enter "Gold".
- Description: Enter "Gold items information" (this helps users know what this record type is for).
- Uncheck "Make Available": This means you're not making the Gold record type available to everyone yet.
- Click Next.

5. Assign to Profiles

- Scroll down and check the boxes for Gold Smith, Worker JW, and System Administrator profiles. These are the people who will use the Gold record type.
- Click Next.

6. Apply Page Layout for Each Profile

- Select "Apply a different layout for each profile".
- For each profile (Gold Smith, Worker JW, and System Administrator), change the Page Layout to "Page Layout for Gold".
- Click Save & New if you want to create another record type (for Silver).

Activity 2: Create a Record Type for Silver

1. Create Another Record Type

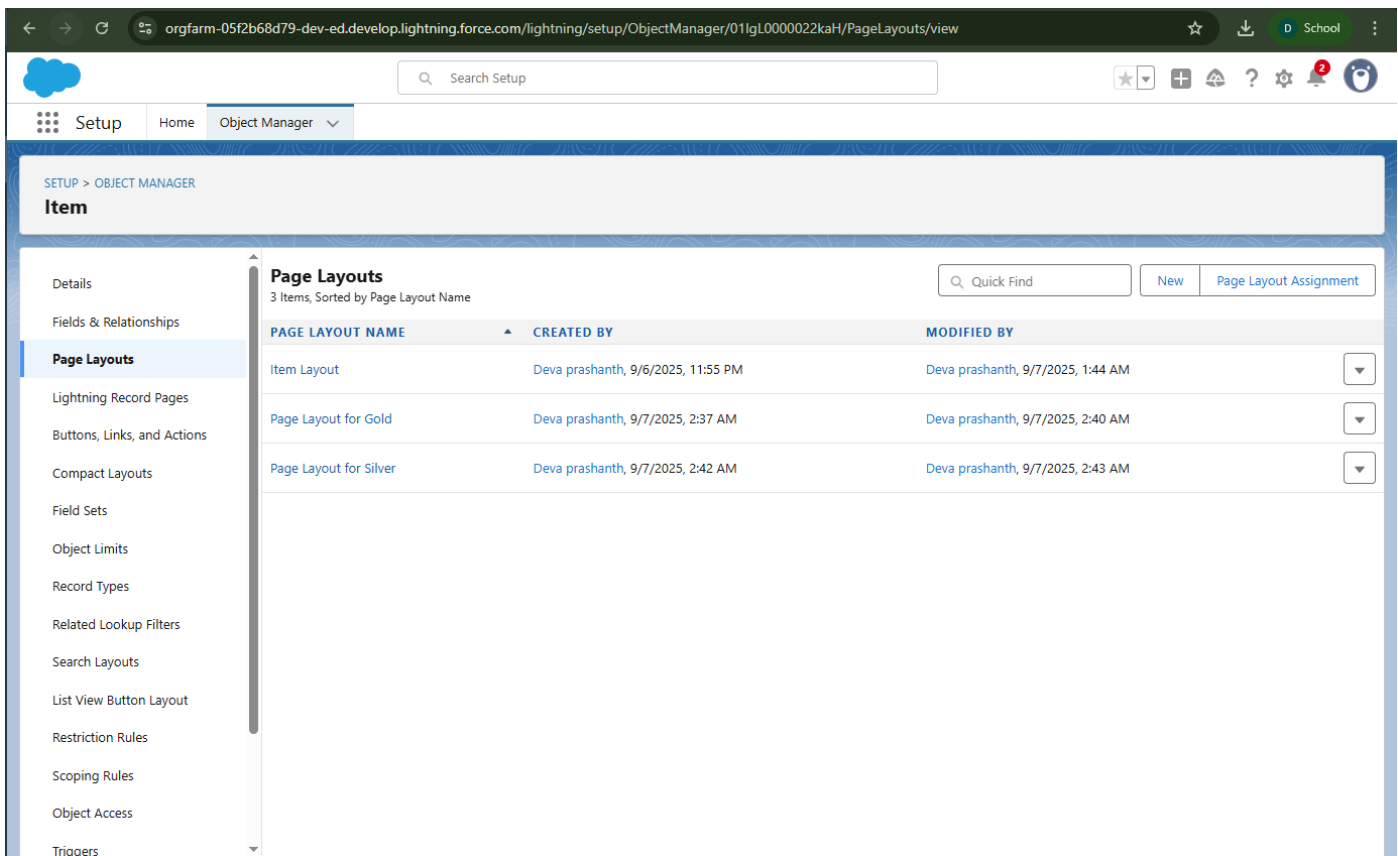
- Repeat the same steps as in Activity 1 to create a new record type.
- For the Record Type Label, enter "Silver".
- For the Description, enter "Silver items information".

2. Assign Profiles for Silver

- Scroll down and check the boxes for the same profiles (Gold Smith, Worker JW, System Administrator).
- Click Next.

3. Apply Silver Layout

- Apply a different layout for each profile.
- For each profile, change the Page Layout to "Page Layout for Silver".
- Click Save.



The screenshot shows the Salesforce Setup interface for the 'Item' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts (selected), 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, and Triggers. The main content area is titled 'Page Layouts' and shows a table with 3 items, sorted by Page Layout Name. The table has columns for PAGE LAYOUT NAME, CREATED BY, and MODIFIED BY. The items listed are 'Item Layout', 'Page Layout for Gold', and 'Page Layout for Silver'. Each item has a dropdown arrow in the rightmost column. The browser address bar shows the URL: orgfarm-05f2b68d79-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL0000022kaH/PageLayouts/view.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Item Layout	Deva prashanth, 9/6/2025, 11:55 PM	Deva prashanth, 9/7/2025, 1:44 AM
Page Layout for Gold	Deva prashanth, 9/7/2025, 2:37 AM	Deva prashanth, 9/7/2025, 2:40 AM
Page Layout for Silver	Deva prashanth, 9/7/2025, 2:42 AM	Deva prashanth, 9/7/2025, 2:43 AM

Milestone:10 PERMISSION SETS

ACTIVITY 1:Creating Permission Sets

1. Go to Setup

- Click the gear icon in the top-right corner of Salesforce.
- Select Setup.

2. Search for Permission Sets

- In the Quick Find box on the left, type "Permission Sets" and click on it.

3. Create a New Permission Set

- Click the New button to create a new permission set.

4. Fill in the Permission Set Details

- Label: Enter the label name as "Per to Worker".
- API Name: This will auto-populate once you enter the label.
- save

Configure Object Settings in the Permission Set

5. Select Object Settings

- Under the **Apps** section on the left, click **Object Settings**.

6. Choose the Items Object

- Click on the Items object.
- Click the Edit button.

7. Enable Record Types (Gold and Silver)

- In the Item: Record Type Assignments section, enable Gold and Silver record types.

8. Set Object Permissions

- Under Object Permissions, check the boxes for Read, Edit, and Create.

9. Save the Permission Set

- Click **Save** to save these settings.

Assign Permission Set to Users

10. Manage Assignment

- After saving the permission set, click Manage Assignments.

11. Add Assignment

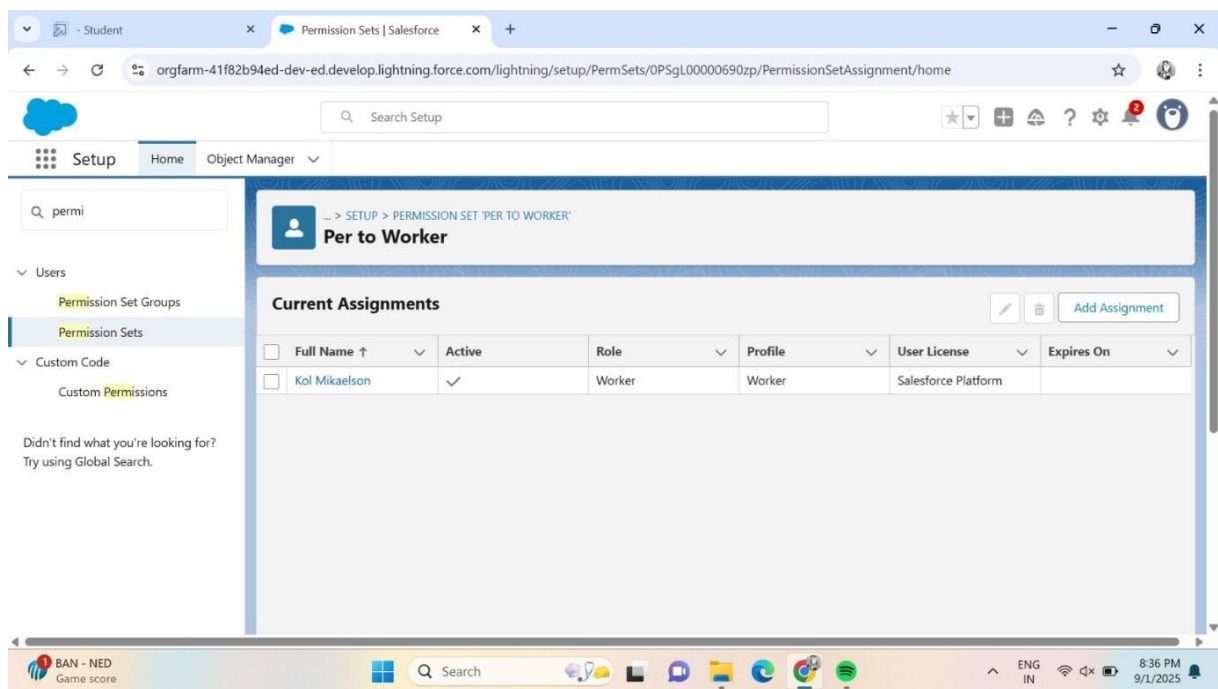
- Click Add Assignment.

12. Select Users

- Find and select the users you created in the User Milestone who have the Worker profile.
- Click Next, then click Assign.

13. Finish

- After assigning the permission set, click Done.



Milestone 11:TRIGGER

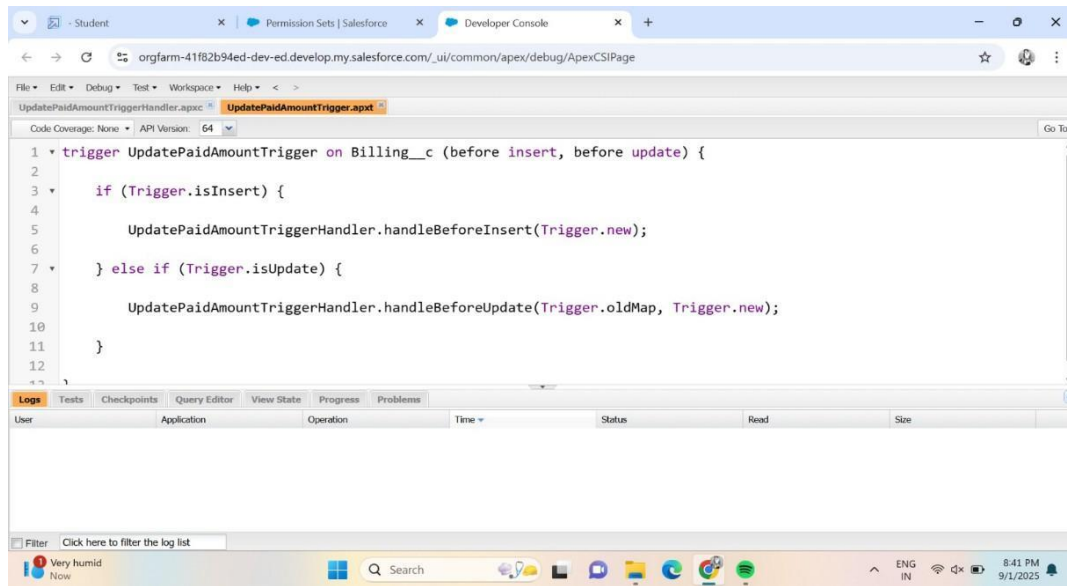
ACTIVITY 1:Create A Trigger Handler Class

Code:

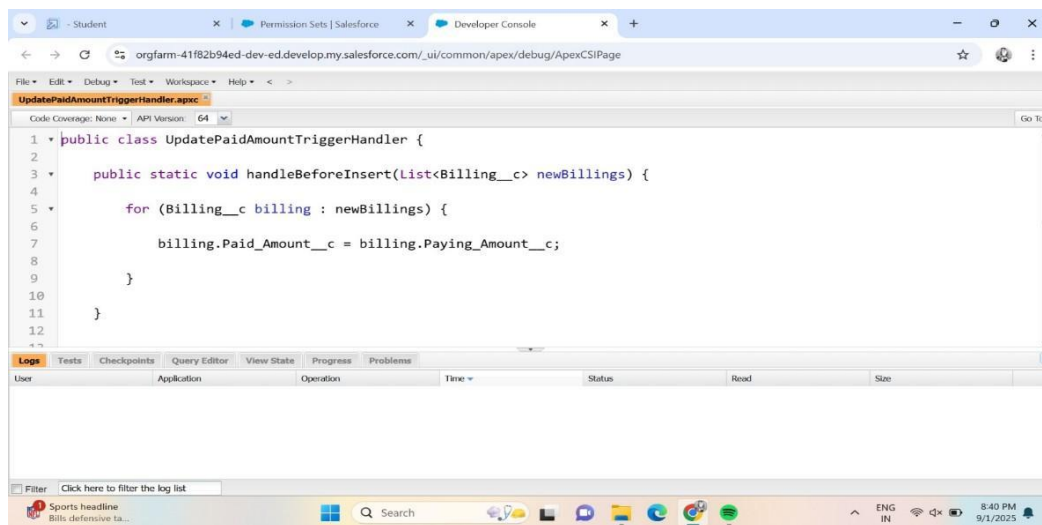
```

public class UpdatePaidAmountTriggerHandler {
    public static void handleBeforeInsert(List<Billing__c> newBillings) {
        for (Billing__c billing : newBillings) {
            billing.Paid_Amount__c = billing.Paying_Amount__c;
        }
    }
}

```



ACTIVITY 2: Create The Trigger



Milestone 12: USER ADOPTION

ACTIVITY 1: Create a Record (Jewel Customer)

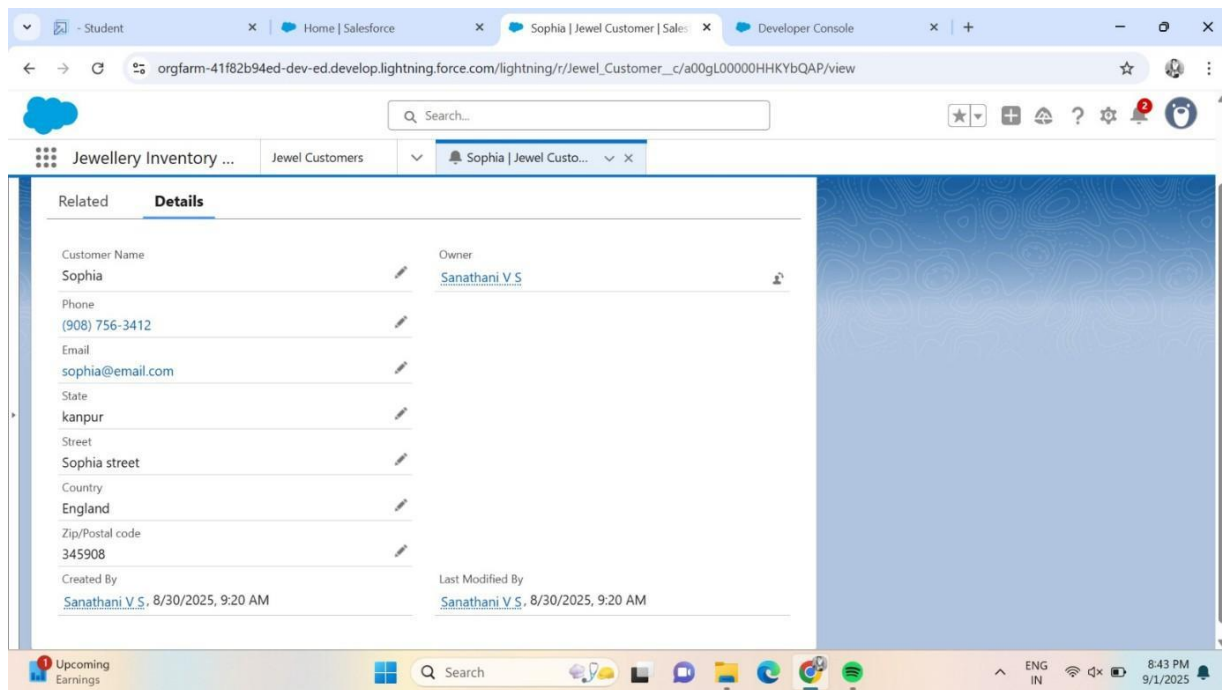
1. Click on App Launcher:
On the left side of your screen, you'll see an icon called the App Launcher (it might look like a grid of dots). Click on it to open a list of all the apps in your system.
2. Search for "Jewelry Inventory System":
In the search bar, type "Jewelry Inventory System" and click on it once it appears in the search results. This opens the app.
3. Click on Drop Down and Select "Jewel Customer" Tab:
Inside the Jewelry Inventory System app, you'll see a drop-down menu or list of tabs at the top. Click on the drop-down, and from the list, choose the Jewel Customer tab. This tab is where you can manage your customer information.

The screenshot displays the 'Jewelry Inventory System' app interface. At the top, there's a search bar and a navigation bar with tabs for 'Jewellery Inventory ...', 'Jewel Customers', and 'New Jewel Customer'. The 'New Jewel Customer' tab is active. On the left, a 'Recently Viewed' section shows '0 items • Updated a minute ago' and a search bar. The main area is a form titled 'New Jewel Customer' with a 'Required Information' section. The form fields are: Customer name (marzook), City (milkpuram), Phone (9996969699), Email (mohamedmarzookes23cse@vetias.ac), State (eroad), Street (dog), and Country (india). The 'Owner' field shows 'Sunil A'. At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.

4. Click "New":
After you've selected the Jewel Customer tab, look for a button that says New (usually at the top of the screen). Click this to create a new customer record.
5. Fill in the Details:
A form will appear asking you to enter customer details (such as name, contact info, etc.). Fill out the form with the required information.
6. Click Save:
After entering all the customer details, click the Save button to store the information in the system.

ACTIVITY 2:View A Record(Jeweller Customer)

1. Click on App Launcher:
On the left side of your screen, click the App Launcher icon (a grid of dots) to open a list of apps.
2. Search for "Jewelry Inventory System":
In the search bar, type "Jewelry Inventory System" and select it from the search results. This will open the Jewelry Inventory System app.
3. Click on the Jewel Customer Tab:
Inside the Jewelry Inventory System app, you'll see a list of tabs at the top. Click on the Jewel Customer tab. This will show you a list of all customer records.

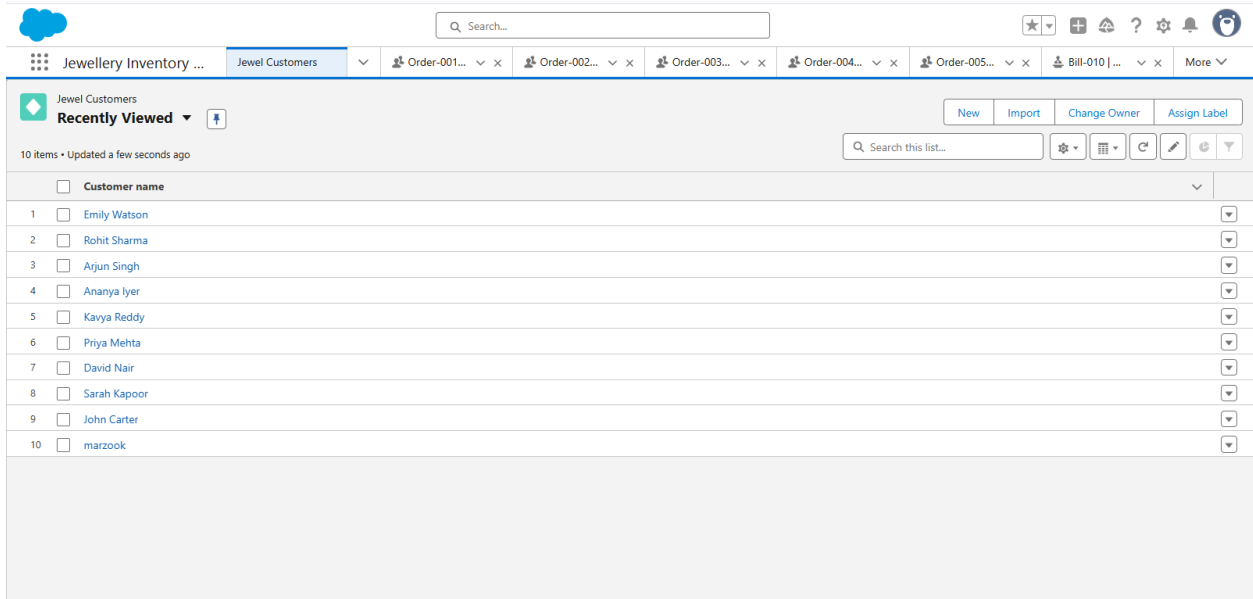


1. Click on the Jewel Customer Tab:
Inside the Jewelry Inventory System app, you'll see a set of tabs. Click on the **ACTIVITY 3:Delete A Record(Jewelry Customer)**

To Delete a Jewel Customer Record:

2. Click on App Launcher:
On the left side of your screen, click the App Launcher icon (grid of dots) to open the list of apps.
3. Search for "Jewelry Inventory System":
In the search bar, type "Jewelry Inventory System" and click on it to open the app.
4. Jewel Customer tab to view the list of customer records.

5. Click on the Arrow:
Find the record you want to delete. On the right side of the record, you'll see an arrow (or a dropdown). Click on that arrow.
6. Click Delete:
In the dropdown menu, click Delete. This will remove that customer record from the system.



The screenshot shows a web application interface for 'Jewellery Inventory'. The top navigation bar includes a search bar and several tabs: 'Jewellery Inventory ...', 'Jewel Customers' (selected), and five 'Order-001...' through 'Order-005...' tabs. Below the navigation bar, the 'Jewel Customers' section is titled 'Recently Viewed' and shows '10 items • Updated a few seconds ago'. A table lists 10 customers, each with a checkbox, a name, and a dropdown arrow on the right. The table is followed by a large empty grey area.

	<input type="checkbox"/> Customer name	
1	<input type="checkbox"/> Emily Watson	▼
2	<input type="checkbox"/> Rohit Sharma	▼
3	<input type="checkbox"/> Arjun Singh	▼
4	<input type="checkbox"/> Ananya Iyer	▼
5	<input type="checkbox"/> Kavya Reddy	▼
6	<input type="checkbox"/> Priya Mehta	▼
7	<input type="checkbox"/> David Nair	▼
8	<input type="checkbox"/> Sarah Kapoor	▼
9	<input type="checkbox"/> John Carter	▼
10	<input type="checkbox"/> marzook	▼

PHASE 5: Deployment, Documentation & Maintenance

Milestone 13:REPORTS

ACTIVITY 1:Create Report

1. Open the App: Go to the app and find the Reports tab.
2. Create a New Report: Click on New Report to start creating a report.
3. Select Report Type:
 - You can choose a report type by browsing categories.
 - Alternatively, you can search for a specific report type.
 - Once you find what you're looking for, click Start Report.
4. Customize Your Report:
 - You'll be able to add specific fields (or data) to the report. These fields are shown on the left side of the screen.
 - Pick the fields you need and drag them into the report.
5. Save or Run the Report:
 - Once you're happy with the report, either save it for future use or run it to generate the data.

	Price Id	
1	Price-007	
2	Price-006	
3	Price-008	
4	Price-009	
5	Price-010	
6	Price-005	
7	Price-004	
8	Price-003	
9	Price-002	
10	Price-001	

ACTIVITY 2:REPORTS

1. Create a Report with "Item with Billings":

2. Create a Report with "Billings with Item and Customer Order":

- Again, go to the Reports tab and click New Report.
- Search for or select "Billings with Item and Customer Order" as the report type.
- Click on Start Report.
- Customize it by adding the fields you want (e.g., billing details, items sold, customer orders, etc.).
- After setting it up, save **or** run the report.

	Billing Id	
1	Bill-010	
2	Bill-009	
3	Bill-008	
4	Bill-007	
5	Bill-006	
6	Bill-005	
7	Bill-004	
8	Bill-003	
9	Bill-002	
10	Bill-001	

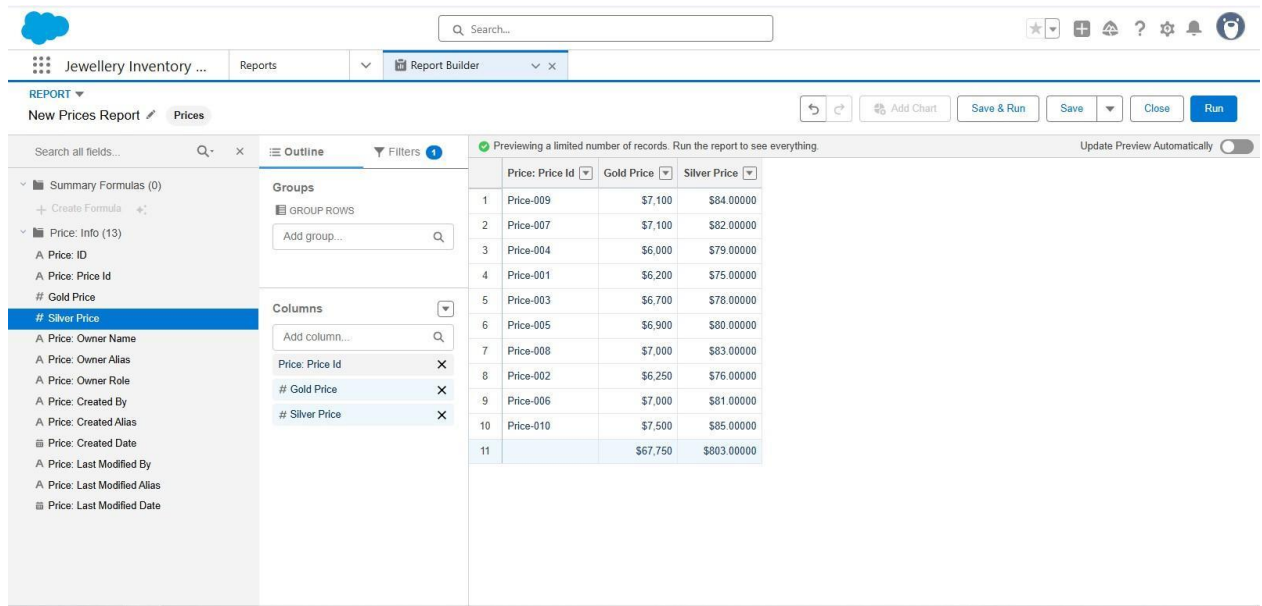
Milestone 14:DASHBOARDS

Activity 1: Create a Dashboard

1. Open the App: Go to the app and click on the Dashboards tab.
2. Create a New Dashboard:
 - Give your dashboard a name (e.g., "Sales Overview").
 - Click on Create.
3. Add a Component:
 - After creating your dashboard, click on Add Component.
4. Select a Report:
 - Choose a report that you want to display on the dashboard (e.g., "Item with Billings").
 - Click Select to choose the report.
5. Add the Report:
 - After selecting the report, click Add to add it to the dashboard.
6. Save the Dashboard:
 - Click on Save to save the dashboard.
 - Once saved, click Done to finish.

Activity 2: Create Another Dashboard (Repeat Steps from Activity 1)

- Repeat the same steps as in Activity 1 to create another dashboard.
- Give it a different name, add a component (report), save it,



The screenshot shows the Salesforce Report Builder interface. The report is titled 'New Prices Report' and is based on the 'Prices' object. The columns are 'Price: Price Id', 'Gold Price', and 'Silver Price'. The report is previewing a limited number of records (11 rows shown). The interface includes a search bar, a filter button, and a 'Run' button.

	Price: Price Id	Gold Price	Silver Price
1	Price-009	\$7,100	\$84.00000
2	Price-007	\$7,100	\$82.00000
3	Price-004	\$6,000	\$79.00000
4	Price-001	\$6,200	\$75.00000
5	Price-003	\$6,700	\$78.00000
6	Price-005	\$6,900	\$80.00000
7	Price-008	\$7,000	\$83.00000
8	Price-002	\$6,250	\$76.00000
9	Price-006	\$7,000	\$81.00000
10	Price-010	\$7,500	\$85.00000
11		\$67,750	\$803.00000

Milestone 15: FLOWS

ACTIVITY 1: CREATE A FLOW

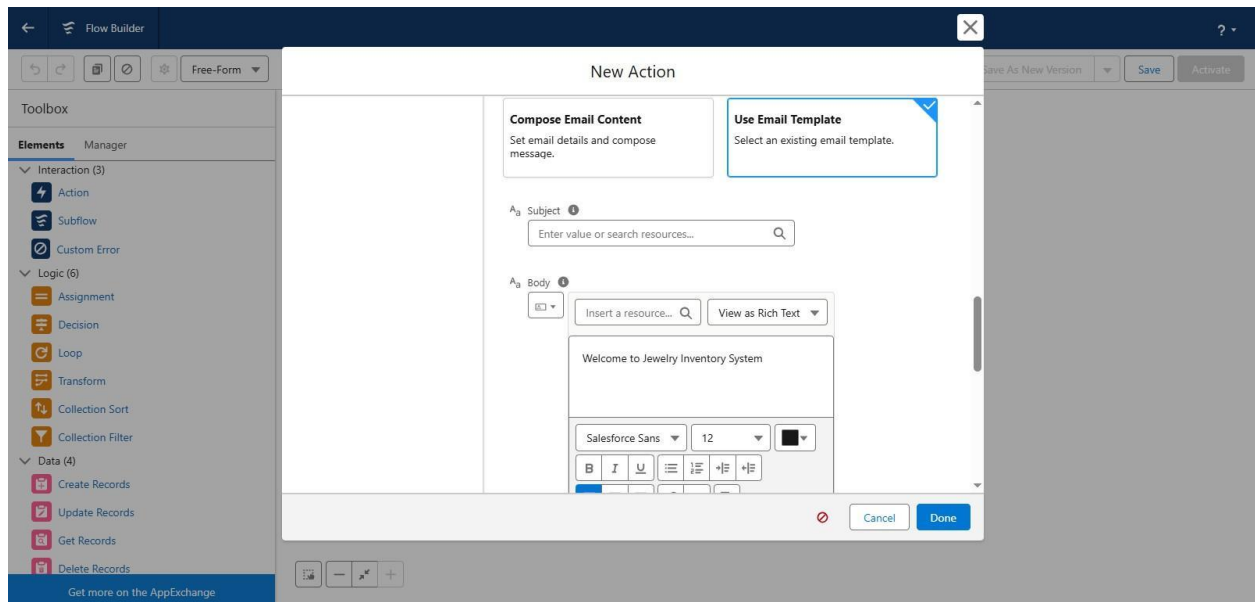
Steps to Create a Flow in Salesforce:

1. Go to Setup:
 - Open Setup in Salesforce.
 - In the Quick Find box, type "Flow" and click on Flow.
2. Create a New Flow:
 - Click on New Flow.
 - Select Record-triggered Flow and click Create.
3. Choose the Object:
 - From the Object dropdown, select "Billing".
 - Set the flow trigger to "A record is Created or Updated".
 - Under Optimize the flow for, select "Actions and Related Records".
 - Click Done.
4. Switch to Free-form Layout:

- Change the flow layout from Auto-layout to Free-form by selecting it.

5. Create a Text Template:

- In the Toolbox, find the Manager option and click on New Resource.
- Choose Text Template as the resource type.
- Enter the API Name as "Email Body".
- Change the View from Rich Text to Plain Text.
- In the Body field, paste the following syntax:
 - **Hello**
 - **Customer Name: {!\$Record.Item_r.Customer_Name_r.Name}**
 - **Here are the details for the item you purchased with Jewellery Inventory System:**
 - **Item Type: {!\$Record.Item_r.Item_Type_c}**
 - **Ornament: {!\$Record.Ornament_c}**
 - **Weight: {!\$Record.Weight_c} grams**
 - **Amount: {!\$Record.Amount_c}**
- Click Done.



Add an Action to Send an Email:

- In the Elements section, drag the Action element to the flow canvas.
- In the action search bar, search for "Send Email" and click on it.
- Set the Label as "Notice" (the API name will auto-populate).
- Enable the Body field and set the value to the Text Template you just created.

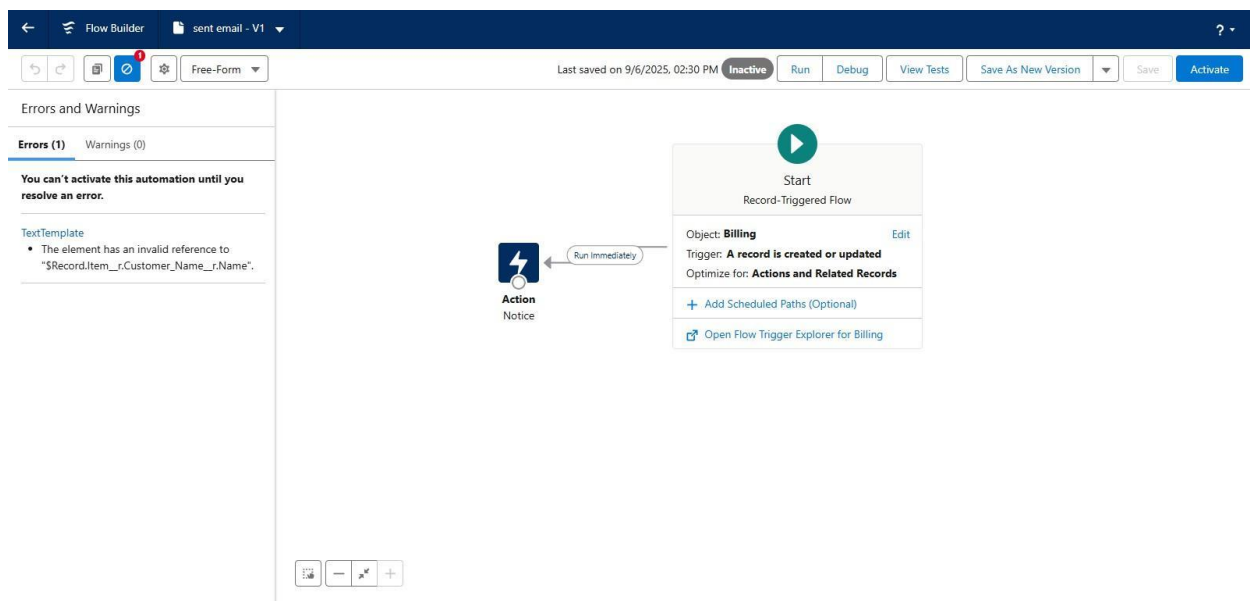
- For Recipient Address, select the email field from the record ({!\$Record.Item_r.Customer_Name_r.Email_c}).
- Set the Subject to "Welcome to Jewelry Inventory System".
- Click Done.

6. Connect the Flow Elements:

- Drag a Path from the Start element to the Action element.

7. Save and Activate the Flow:

- Click Save and give your flow a Label. The API Name will be auto-populated.
- Finally, click Activate to turn the flow on.



CONCLUSION:

By leveraging the Salesforce platform, the project successfully established an efficient, transparent, and user-friendly system for managing jewellery inventory, customer relationships, and sales operations. Through streamlined workflows and real-time coordination among staff, suppliers, and customers, the project significantly improved operational efficiency and customer experience.

The project **“Jewellery Management System using Salesforce CRM”** has been successfully implemented and highlights the effective use of Salesforce technology in automating and optimizing business processes within the retail jewellery sector.

PROJECT ACHIEVEMENTS:

- **Streamlined Inventory Management:** Simplified tracking and management of jewellery stock across multiple categories and locations.
- **Automation of Business Processes:** Implemented custom objects, Flows, and Apex triggers to automate tasks such as order processing, stock alerts, and billing.
- **Improved Reporting & Analytics:** Leveraged dashboards and reports to gain real-time insights into sales, customer behavior, and inventory turnover.
- **Secure Role-Based Access:** Ensured data security and usability with a customized Lightning App, Home Page, and role-specific permissions
-

STUDENT LEARNING OUTCOMES:

- **Hands-On CRM Customization:** Gained practical experience in developing custom Salesforce objects, workflows, and automation.
- **Business Process Understanding:** Learned how to map real-world jewellery business processes into CRM systems.
- **Team Collaboration:** Collaborated effectively in requirements gathering, system design, development, and testing.
- **Professional Tool Exposure:** Worked with industry-standard tools and methodologies, enhancing readiness for enterprise environments.

FUTURE SCOPE:

- **Mobile App Integration:** Enable mobile access for sales staff and customers to view inventory and manage orders on the go.
- **AI & Analytics:** Use predictive analytics to forecast customer buying trends and manage stock efficiently.
- **Third-Party Integration:** Connect with ERP systems, payment gateways, and e-commerce platforms for end-to-end business automation.
- **Scalability Across Branches:** Expand the system for use across multiple store locations, ensuring centralized management and reporting.