

CRM APLLICATION FOR

JEWEL MANAGEMENT

DEVELOPMENT

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INTRODUCTION

Project Overview :

The Jewelry CRM is a custom-built system designed to support jewelry

businesses in managing customers, orders, pricing, billing, and items within a

centralized platform. By using custom objects and automation flows, the CRM

reduces manual work, ensures accurate record-keeping, and improves customer

communication through automated email alerts.



Purpose :

The **purpose of a CRM (Customer Relationship Management) application for**

**jewelry management** is to help jewelry businesses efficiently manage

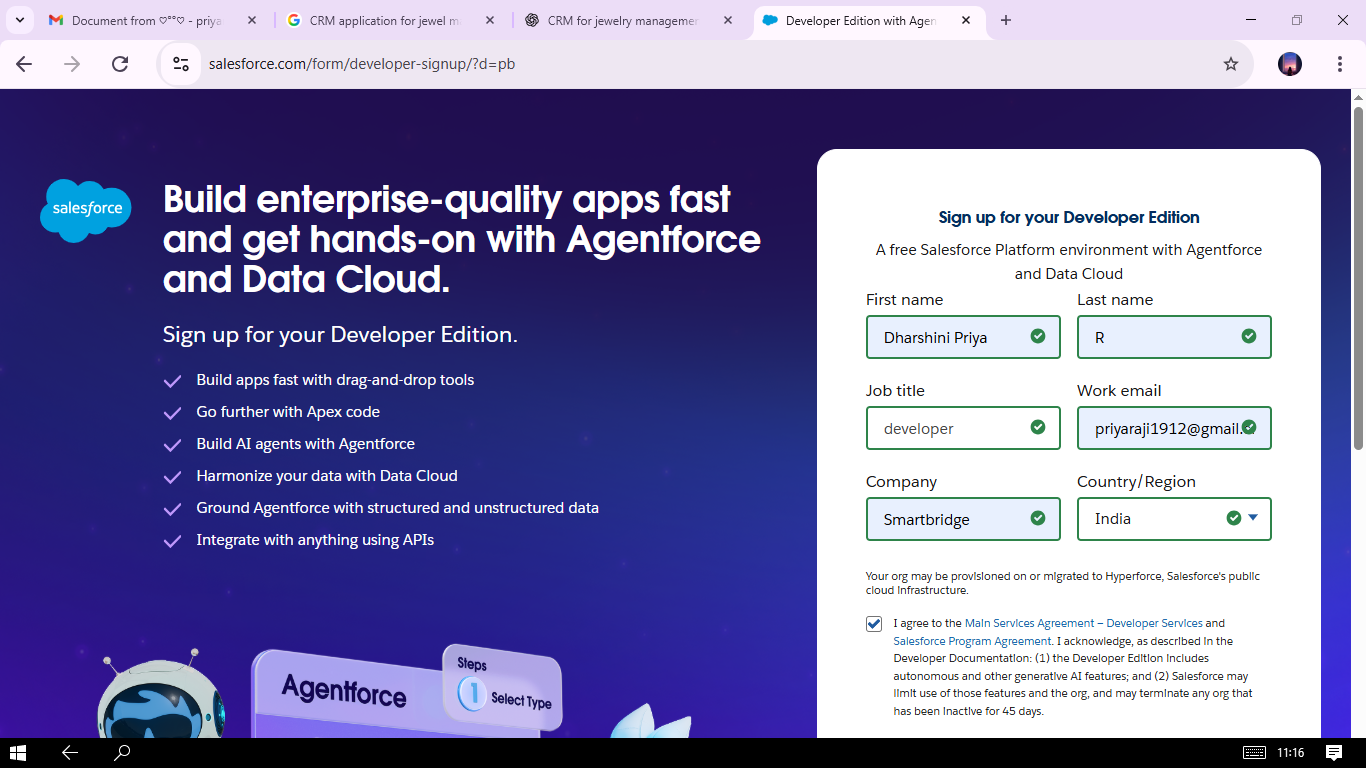
customers, sales, inventory, and communication while improving overall

business performance.

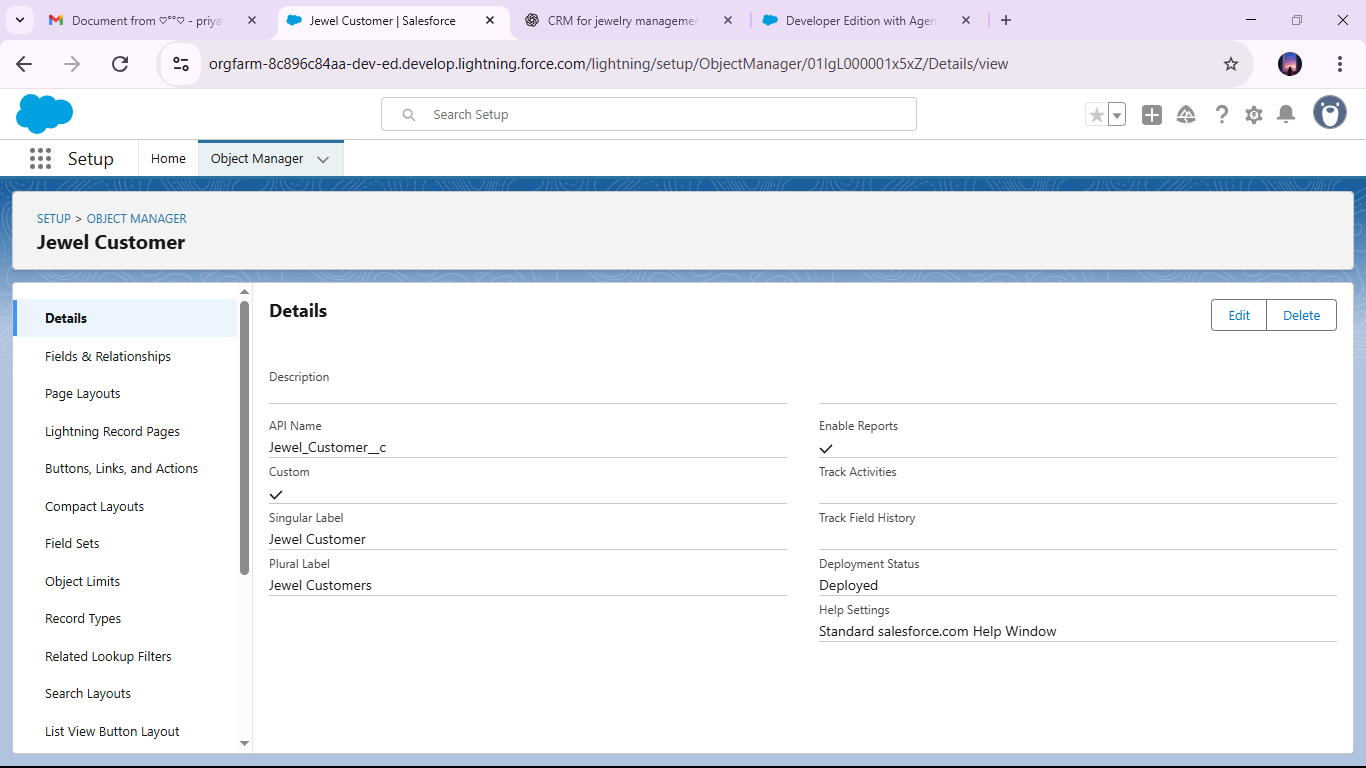
**DEVELOPMENT PHASE**

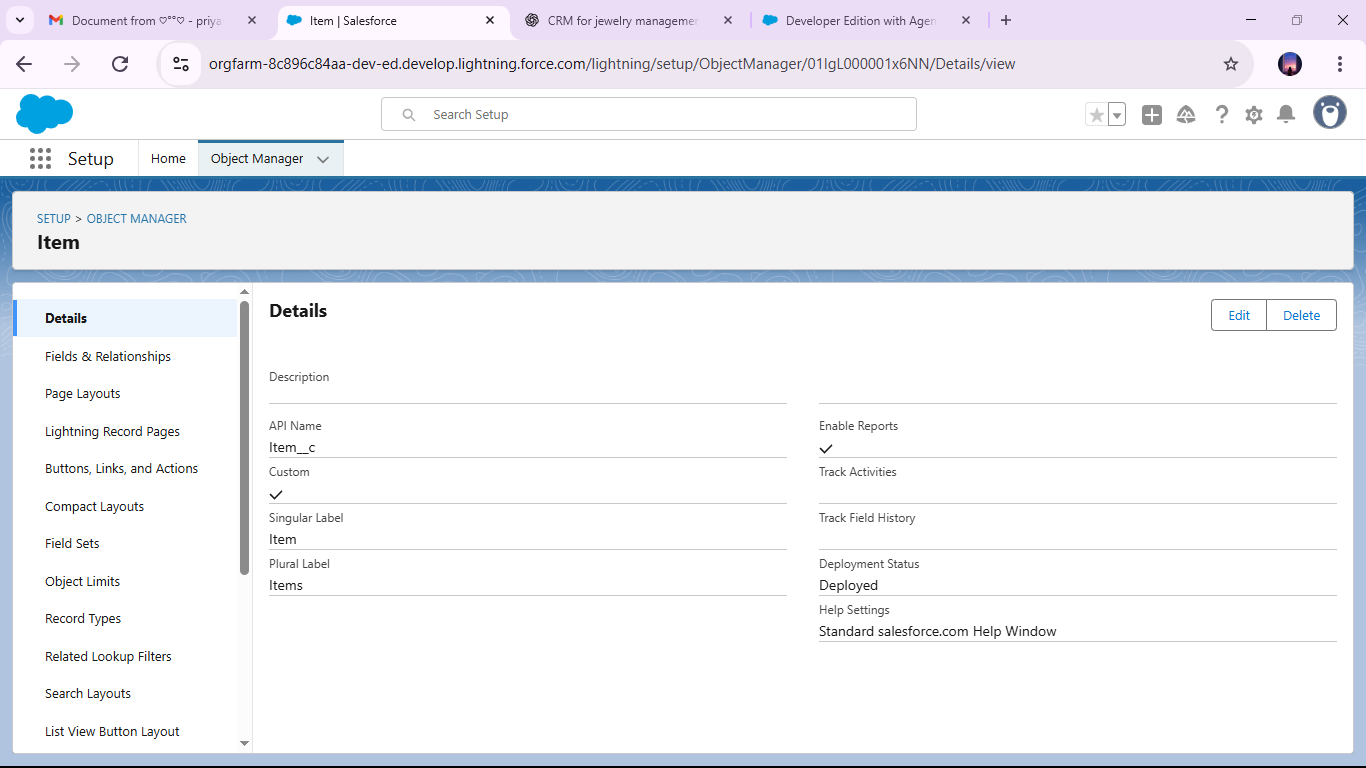
* Creating Developer Account:

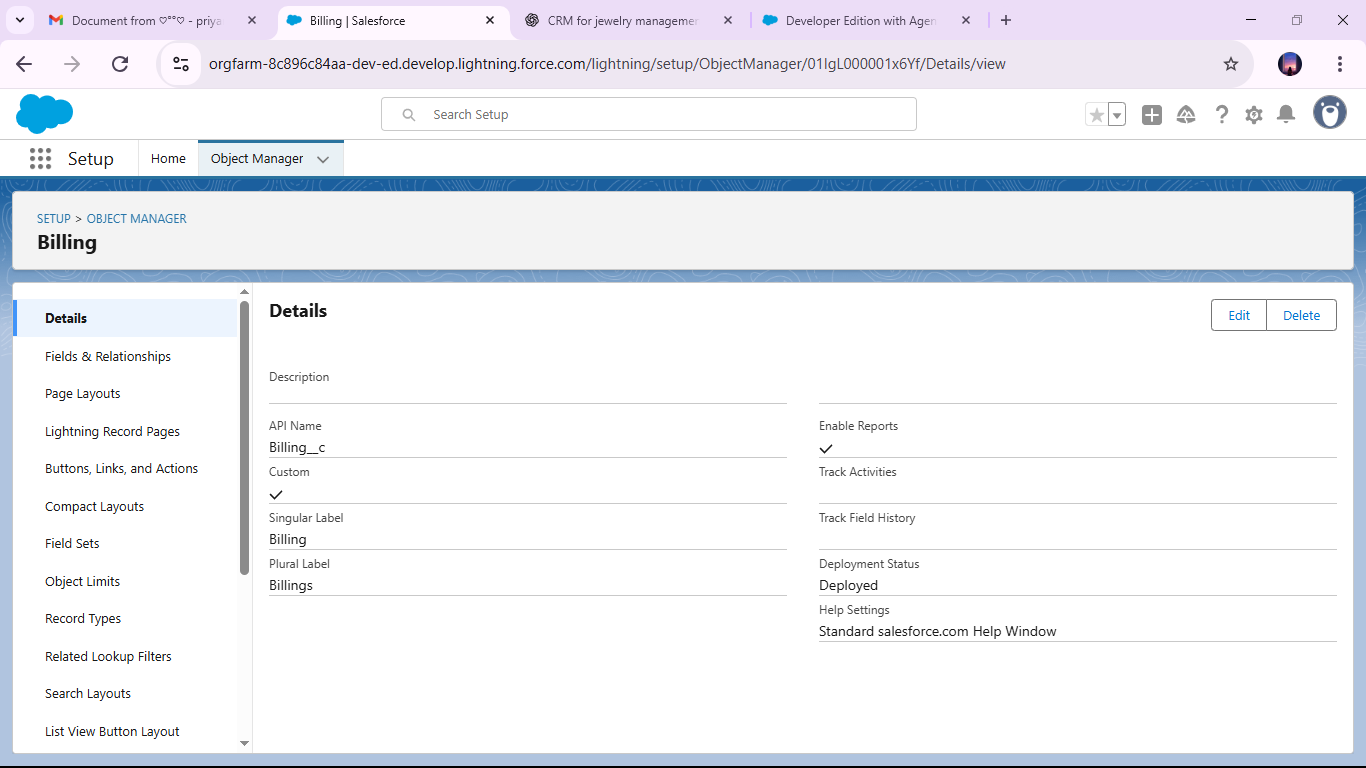
By using this URL - <https://www.salesforce.com/form/developer-signup/?d=pb>

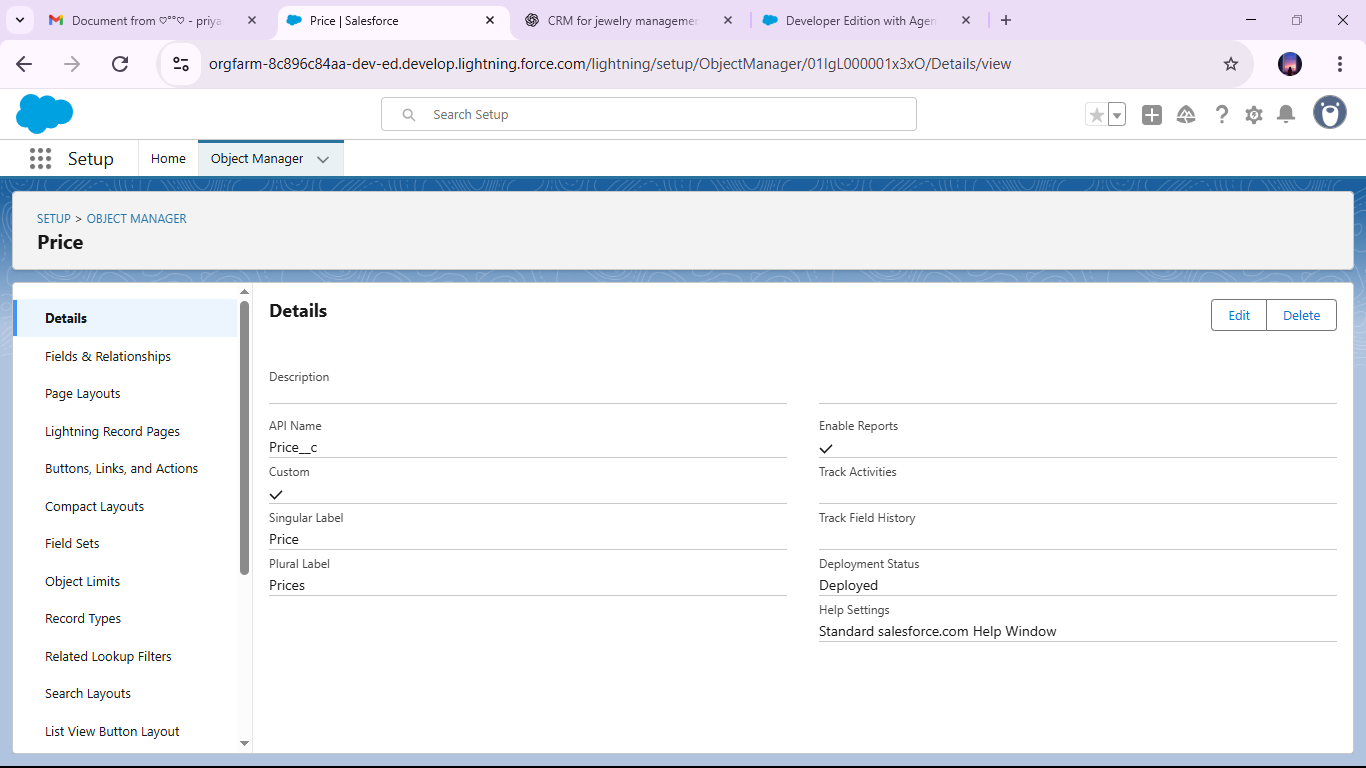


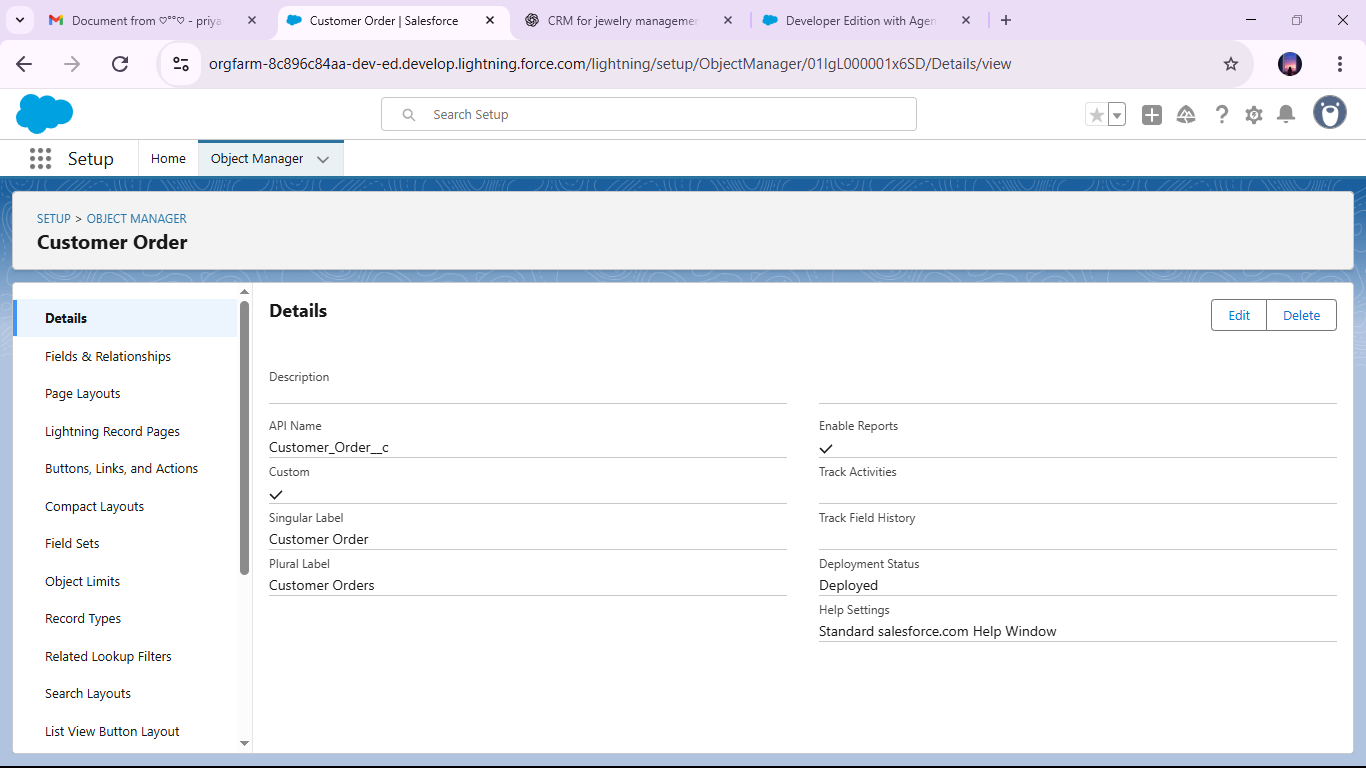
* Created objects : jewel customer,item,billings,customer order,price.



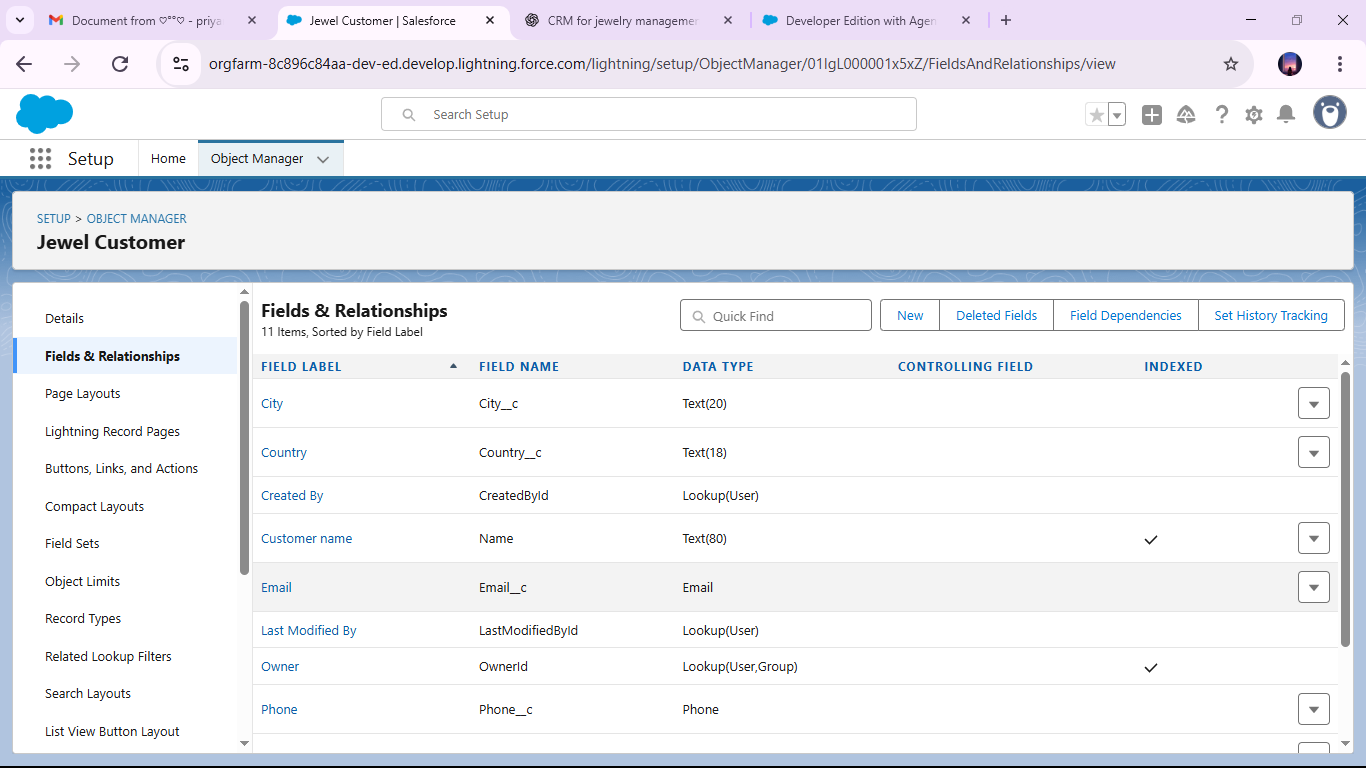


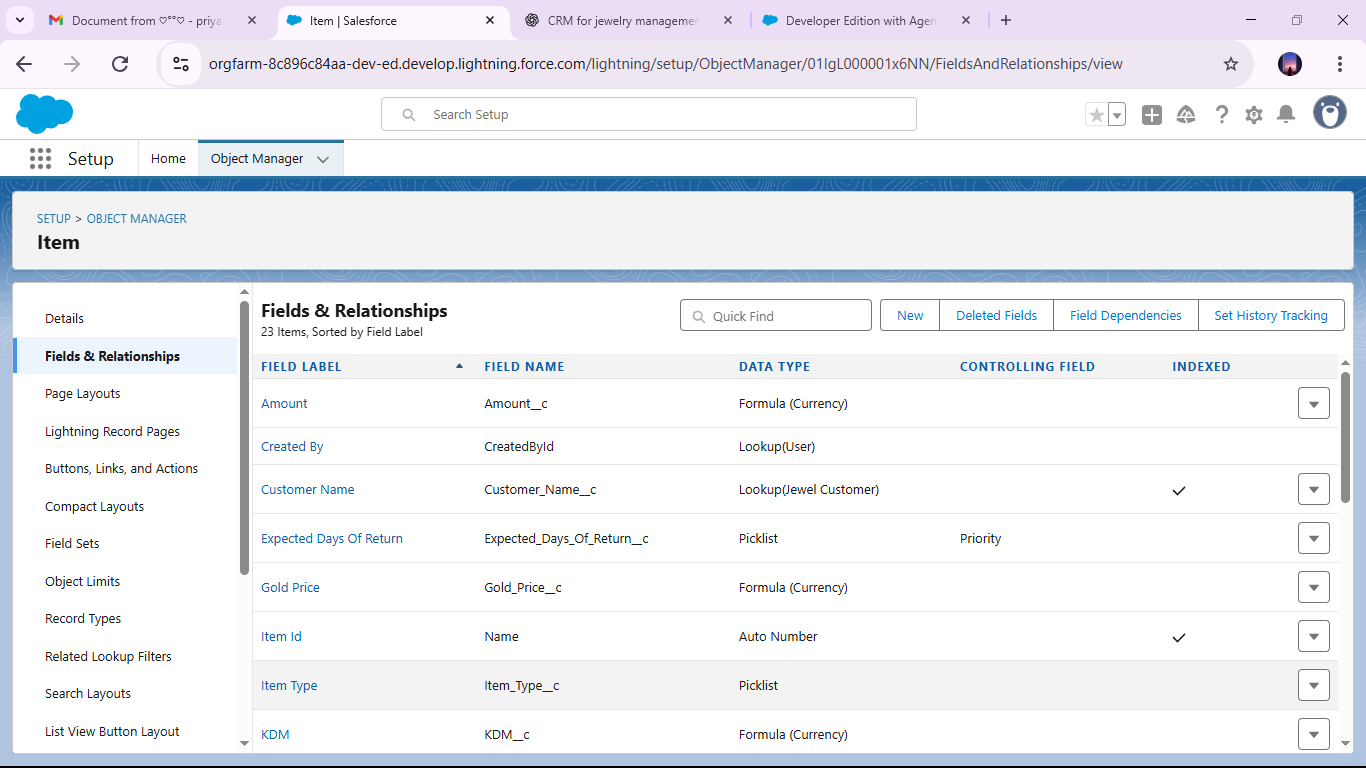


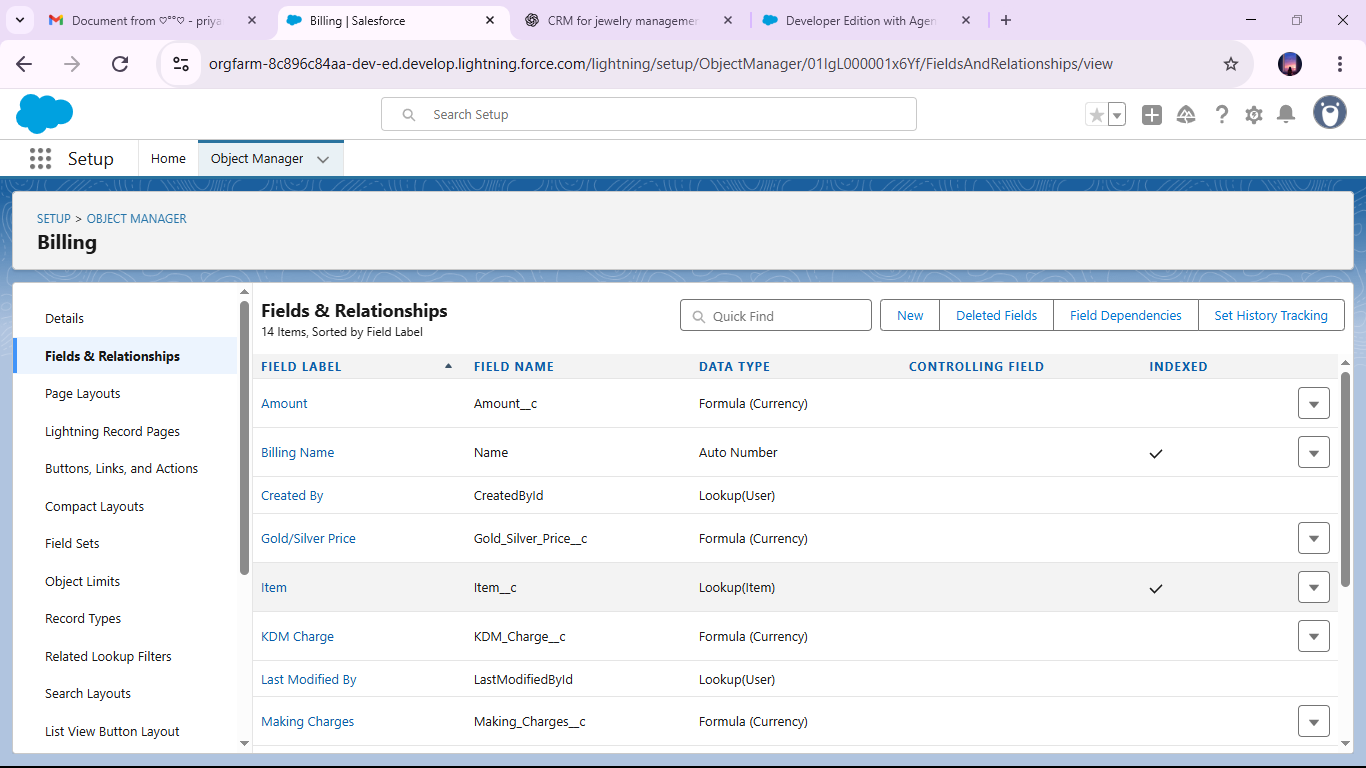


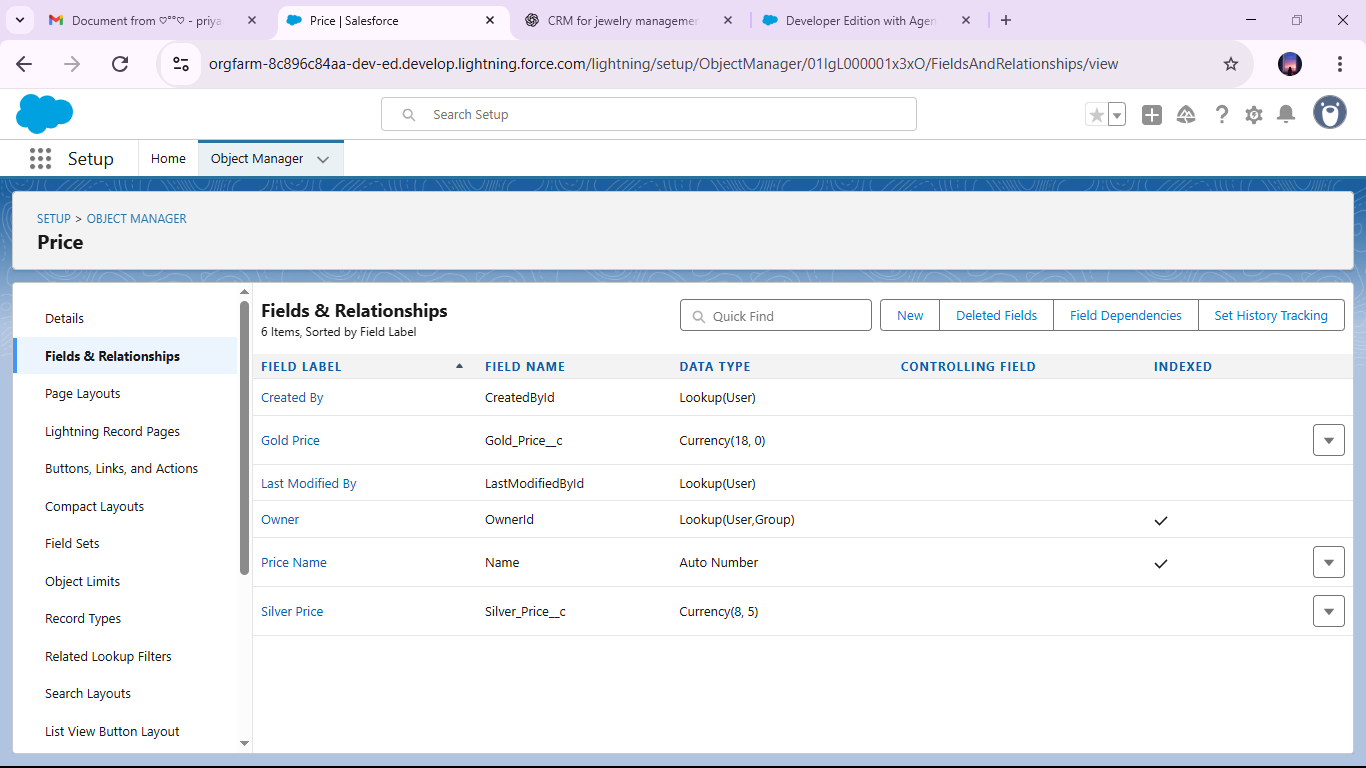


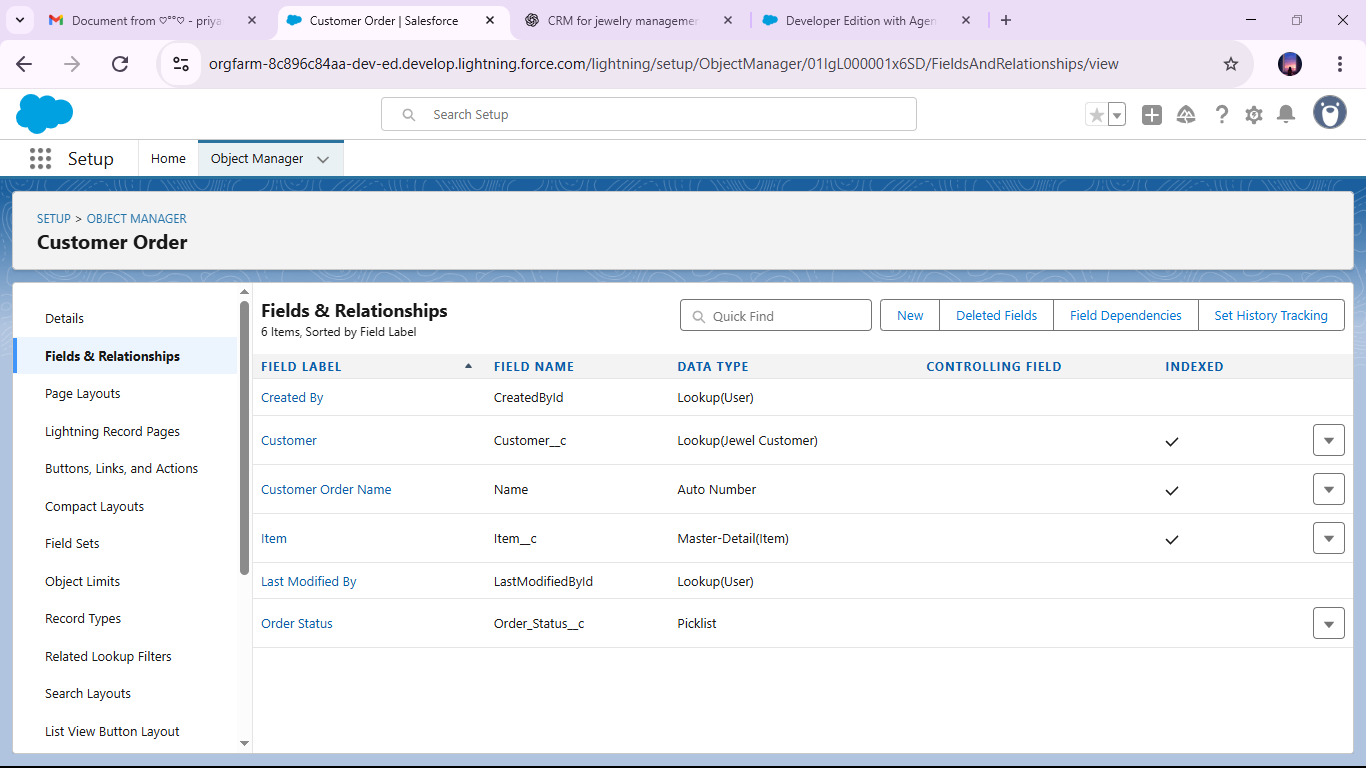
* Configured fields and relationships



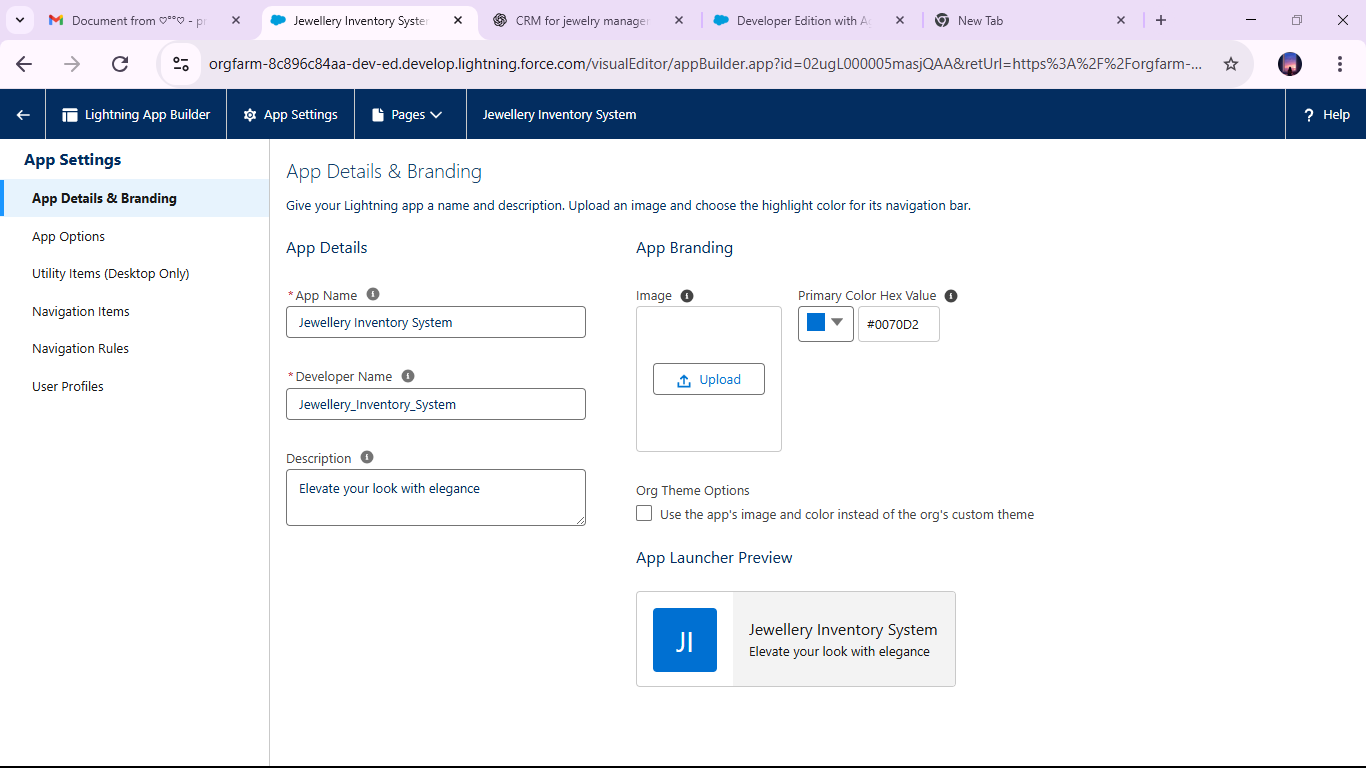


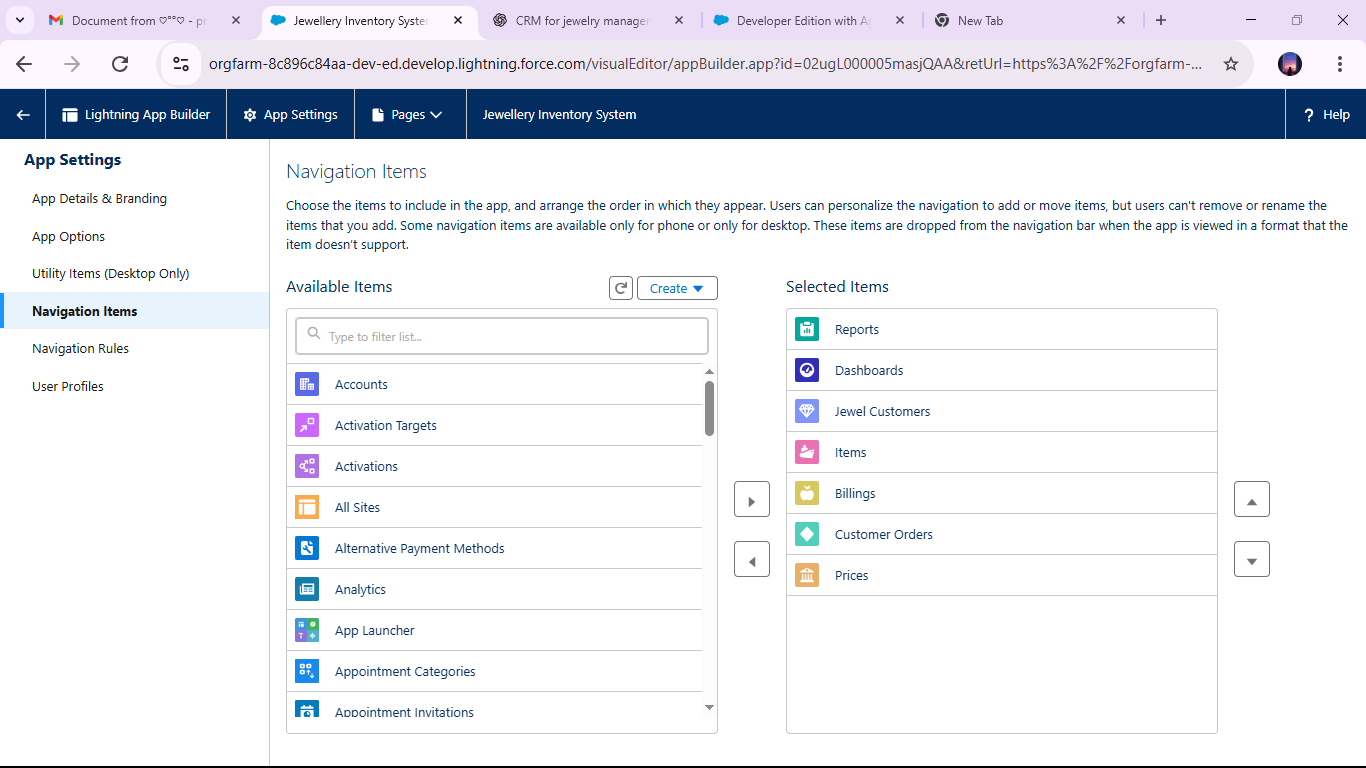


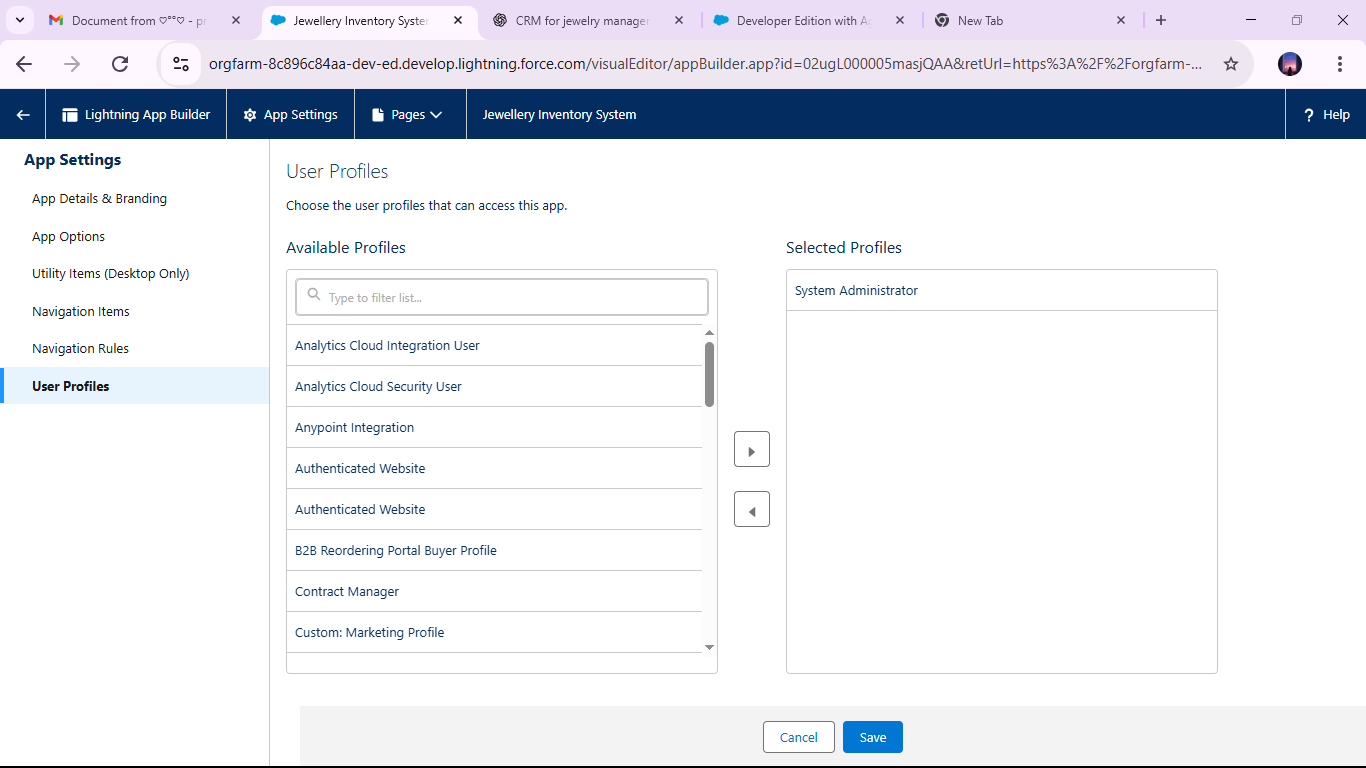


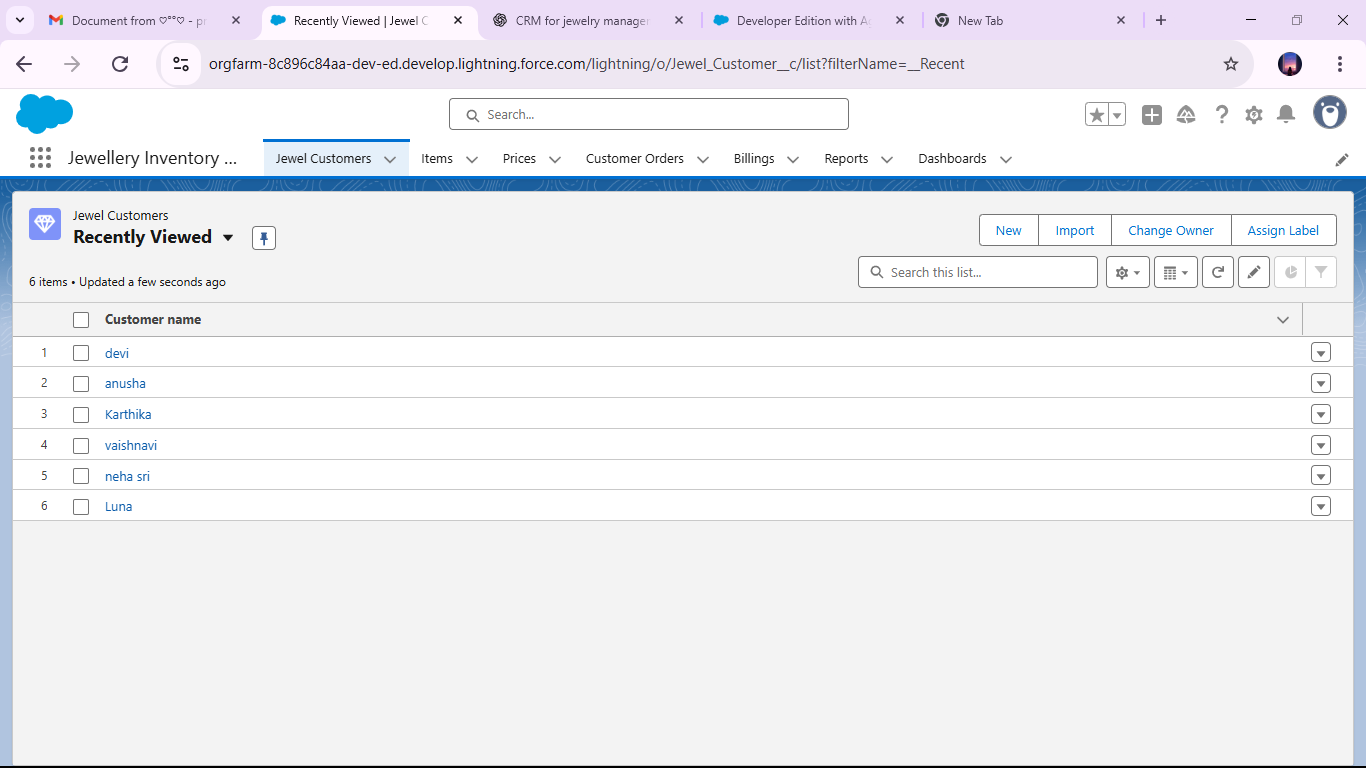


* Developed Lightning App with relevant tabs

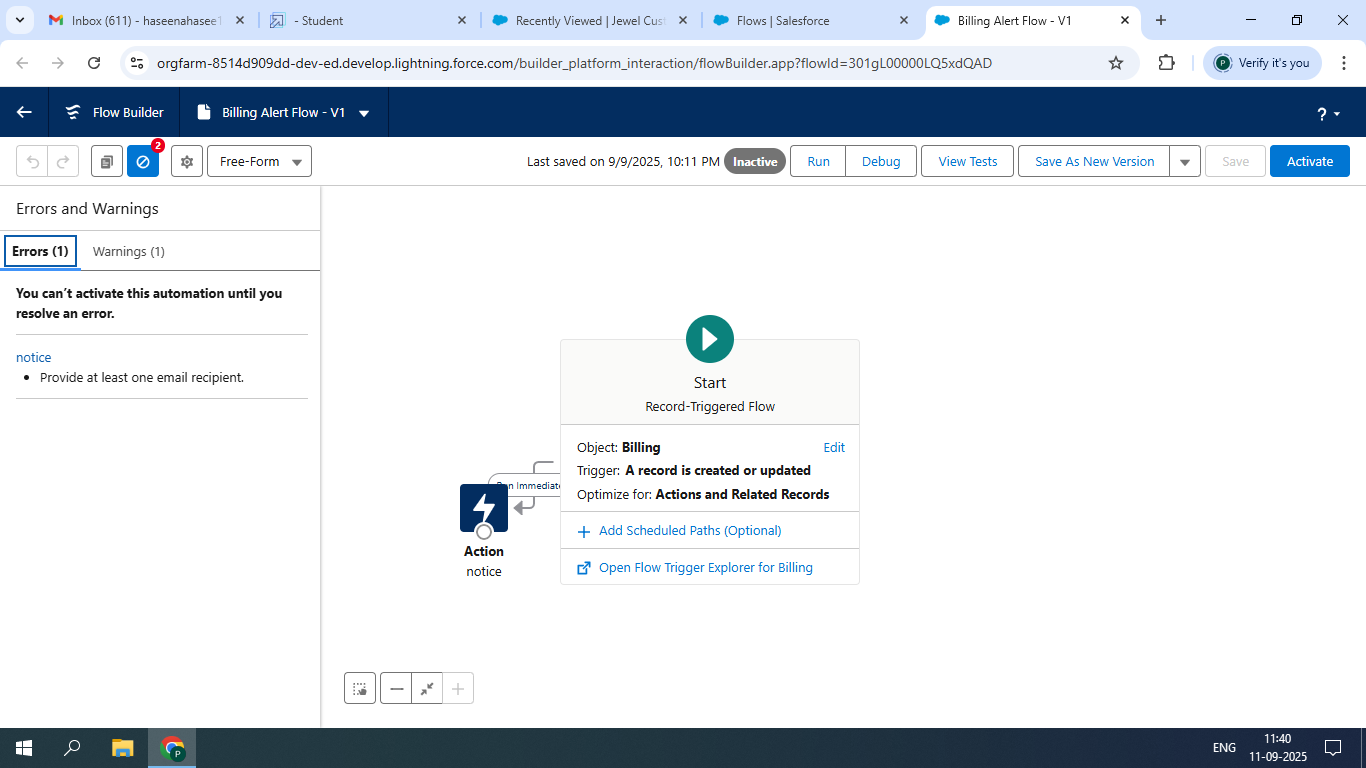


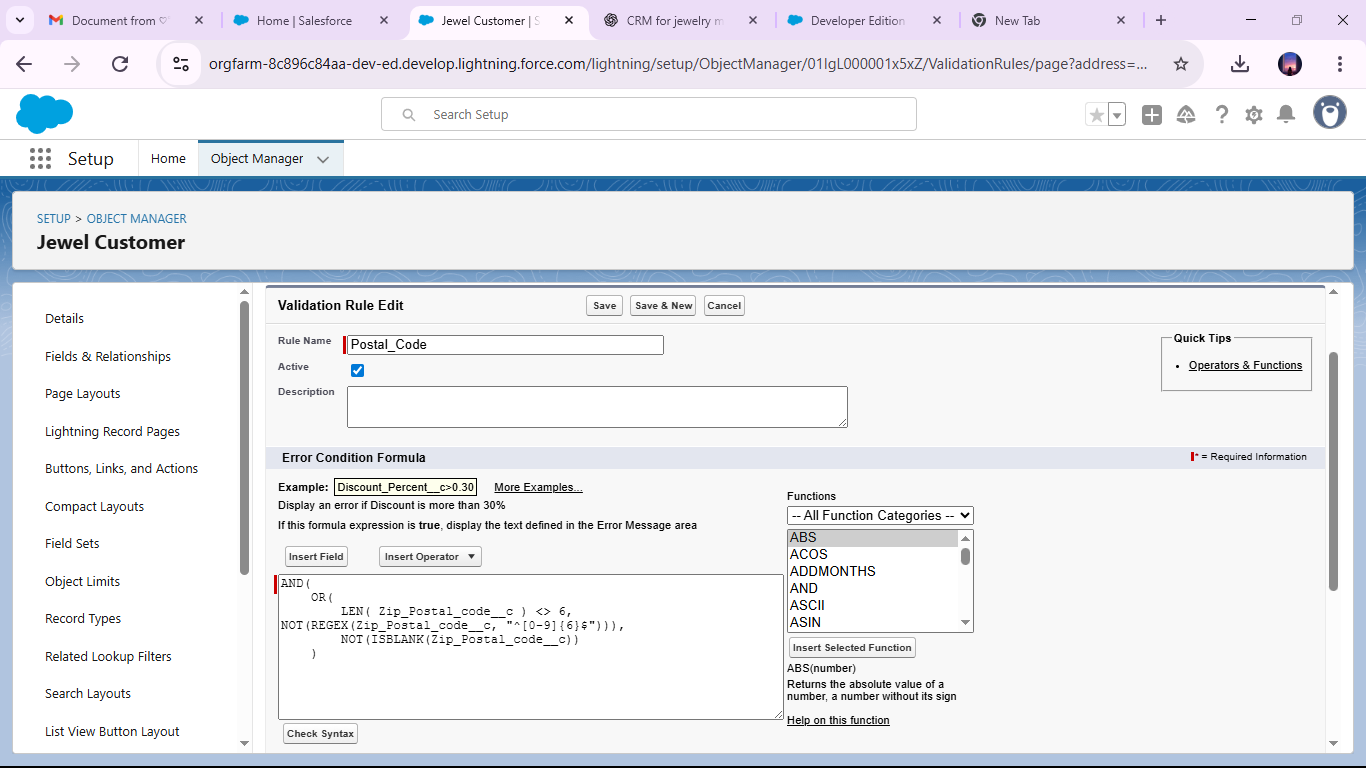
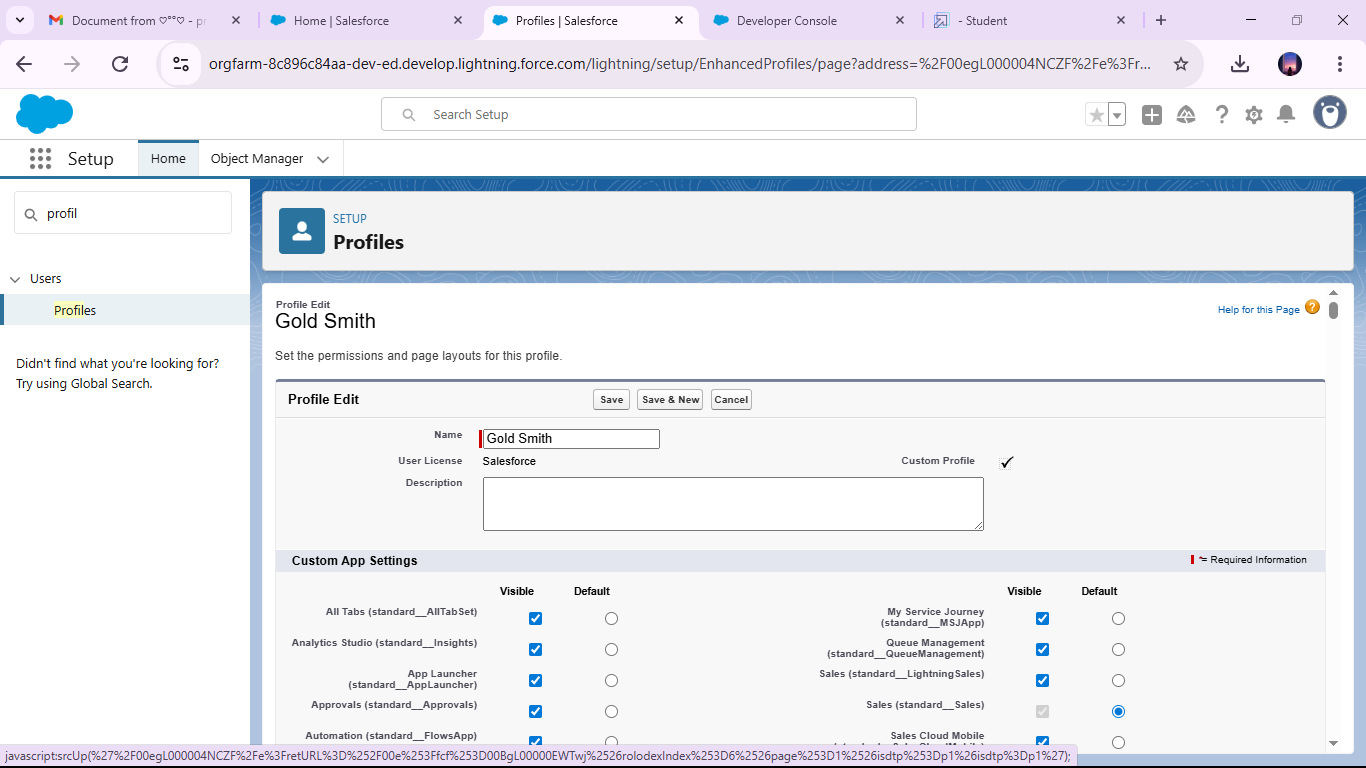


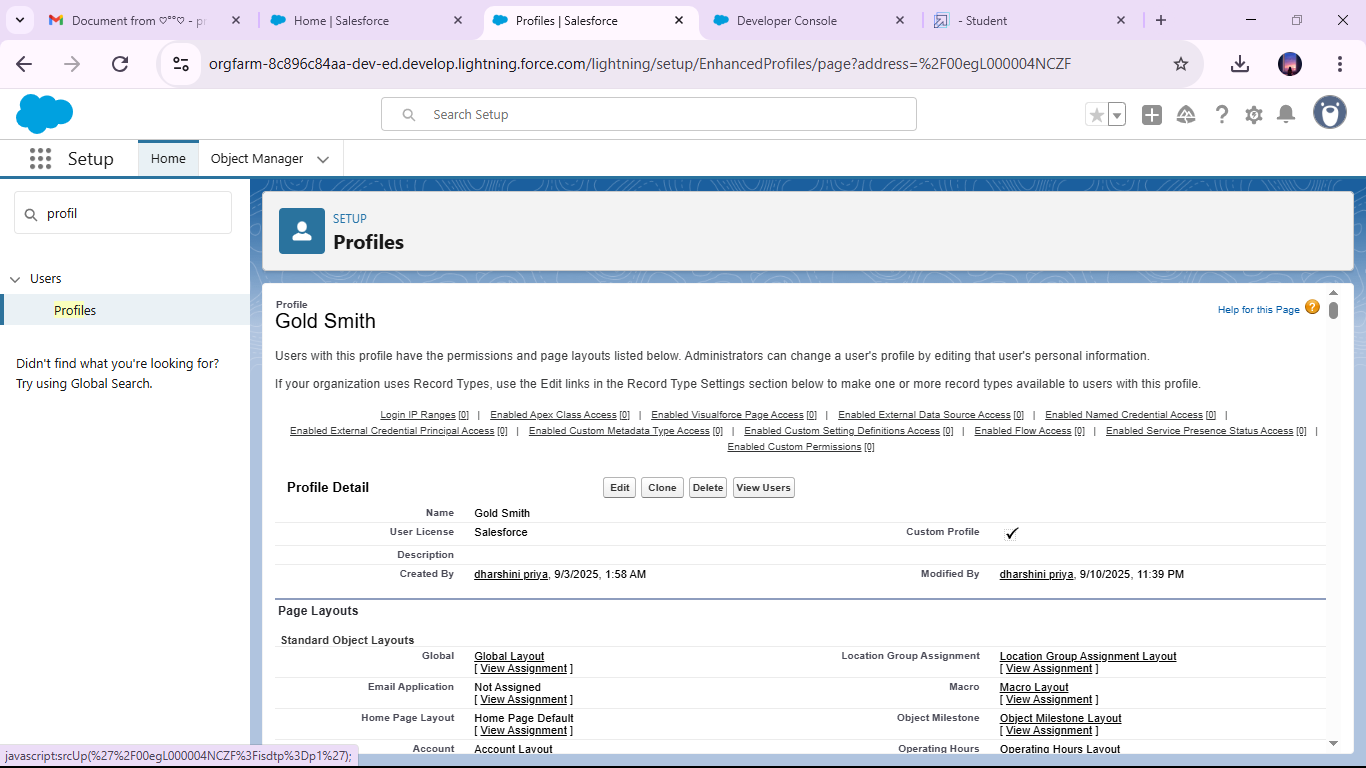




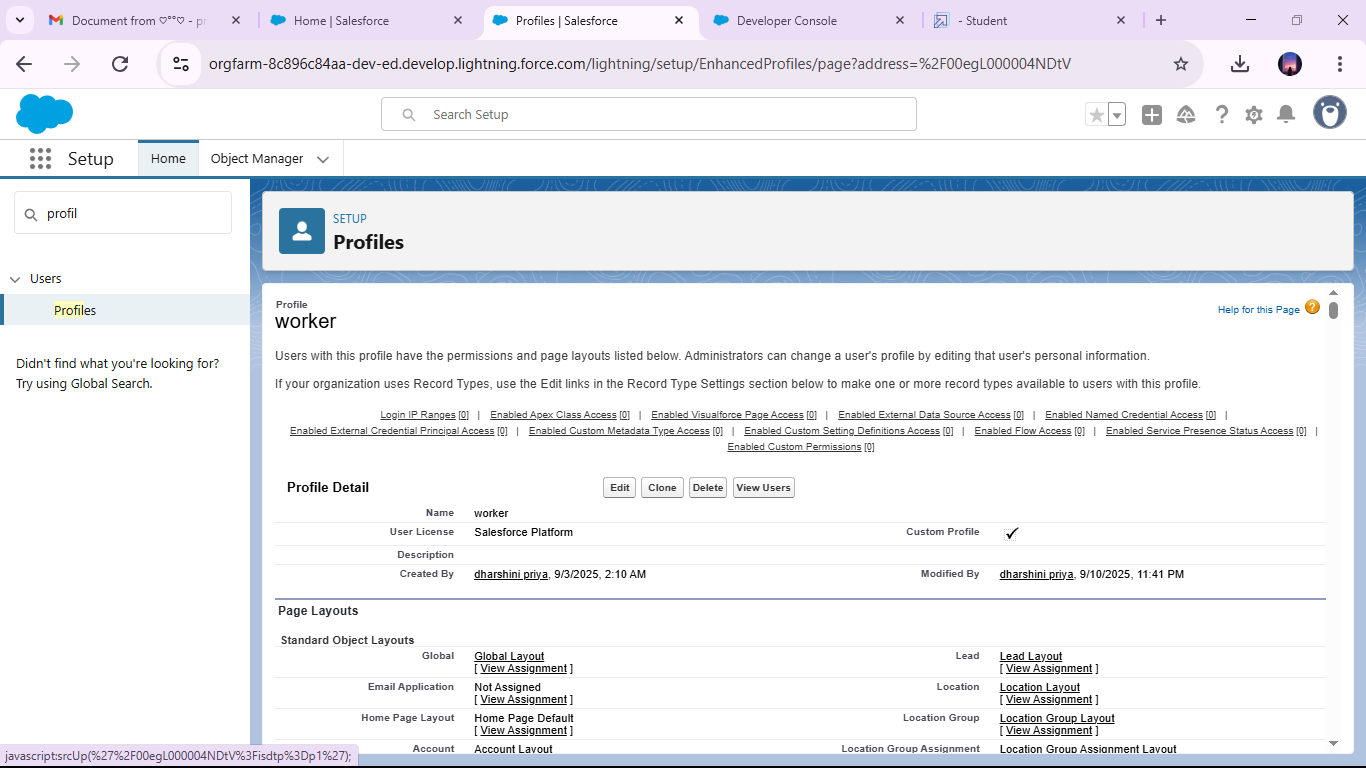
* Implemented Flows



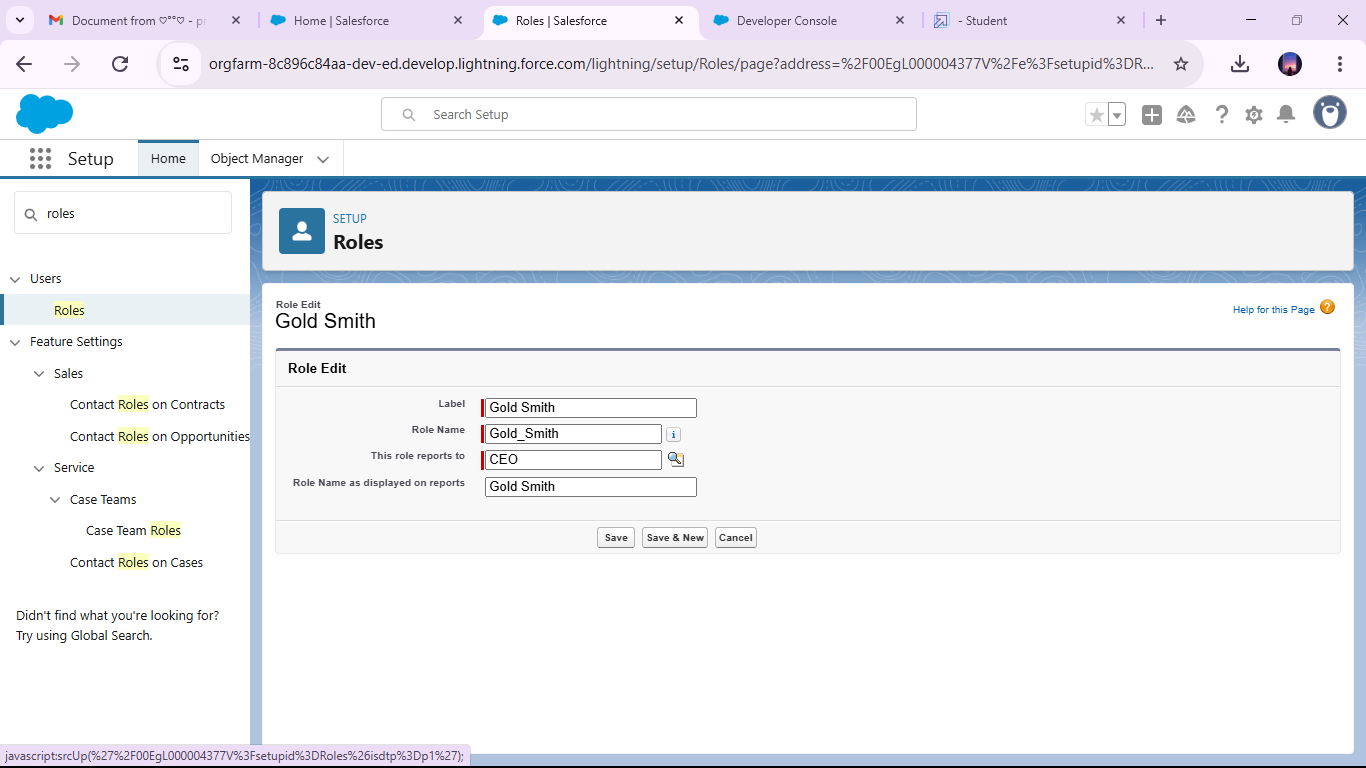
* To create a validation rule to a jewel customer 
* Created profiles for Gold Smith and worker

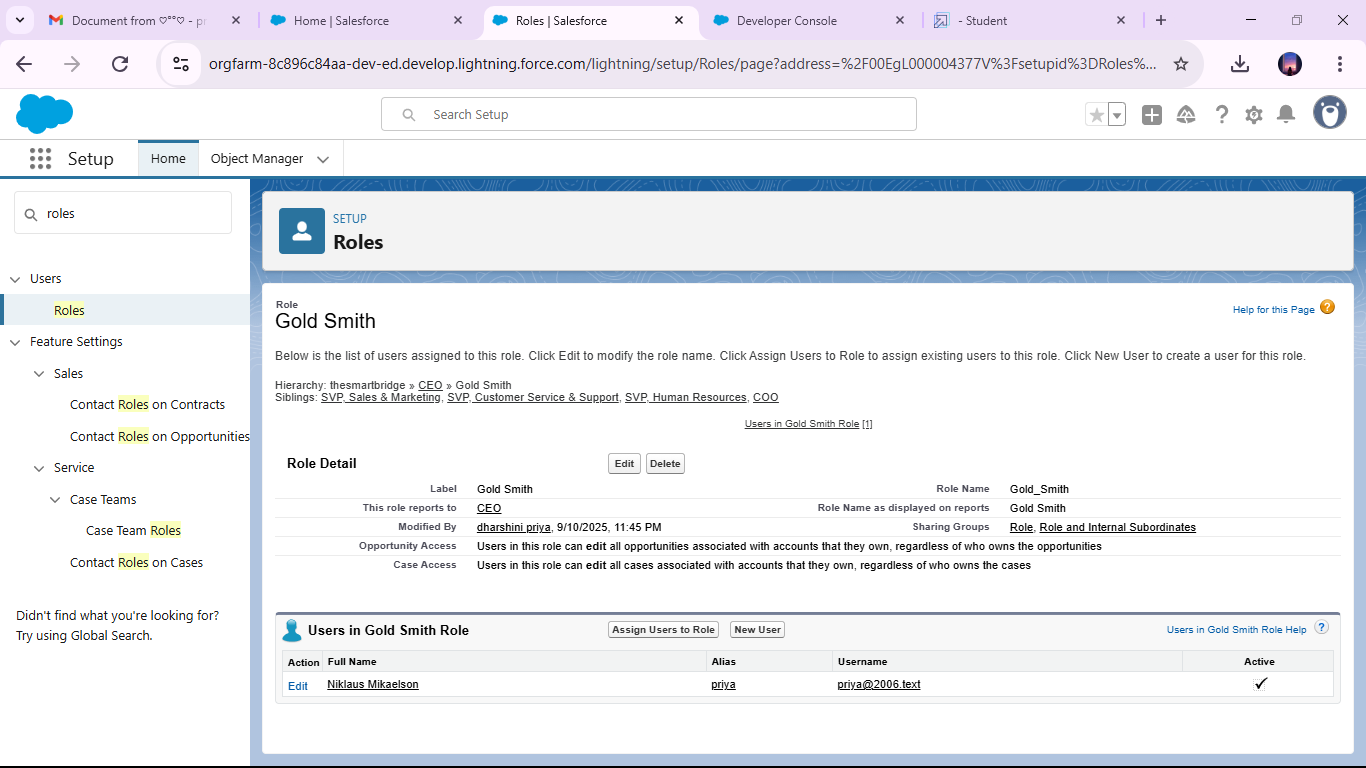




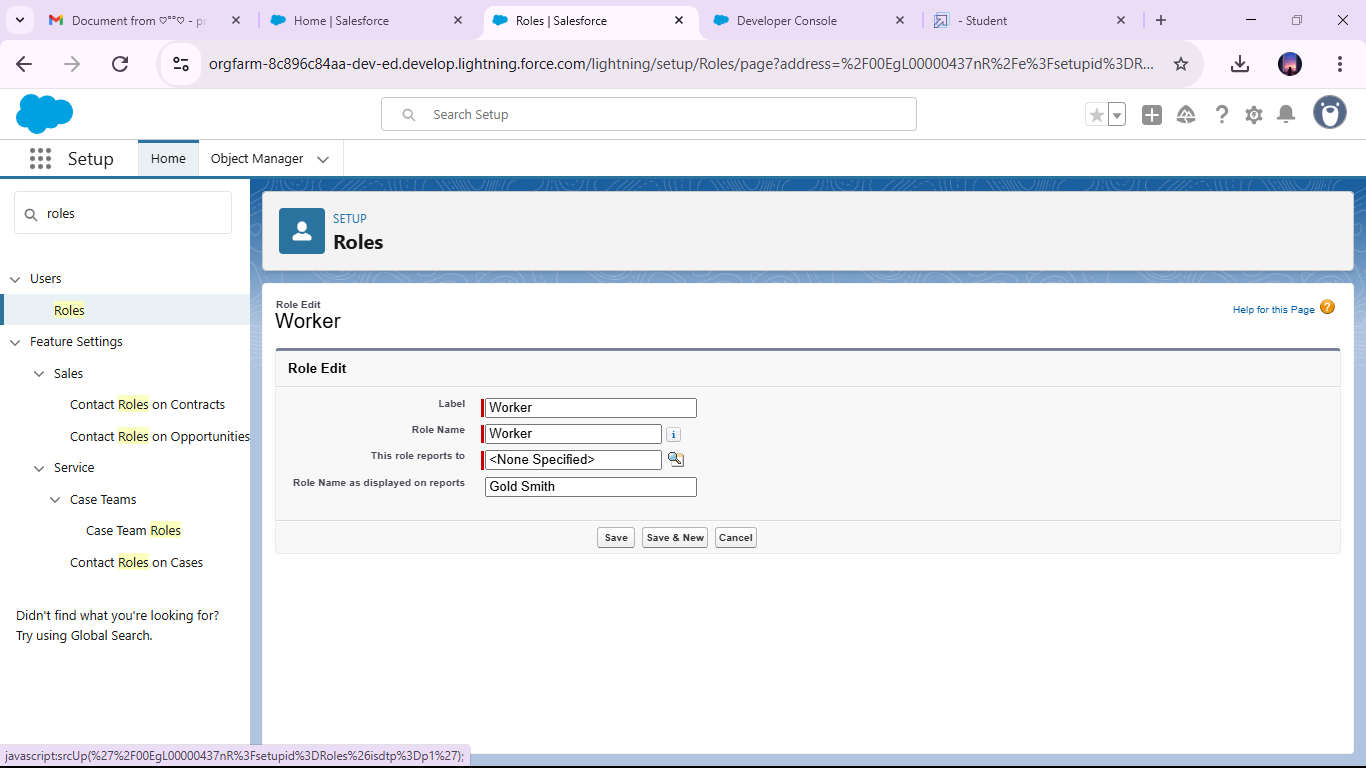


* Creating gold smith role



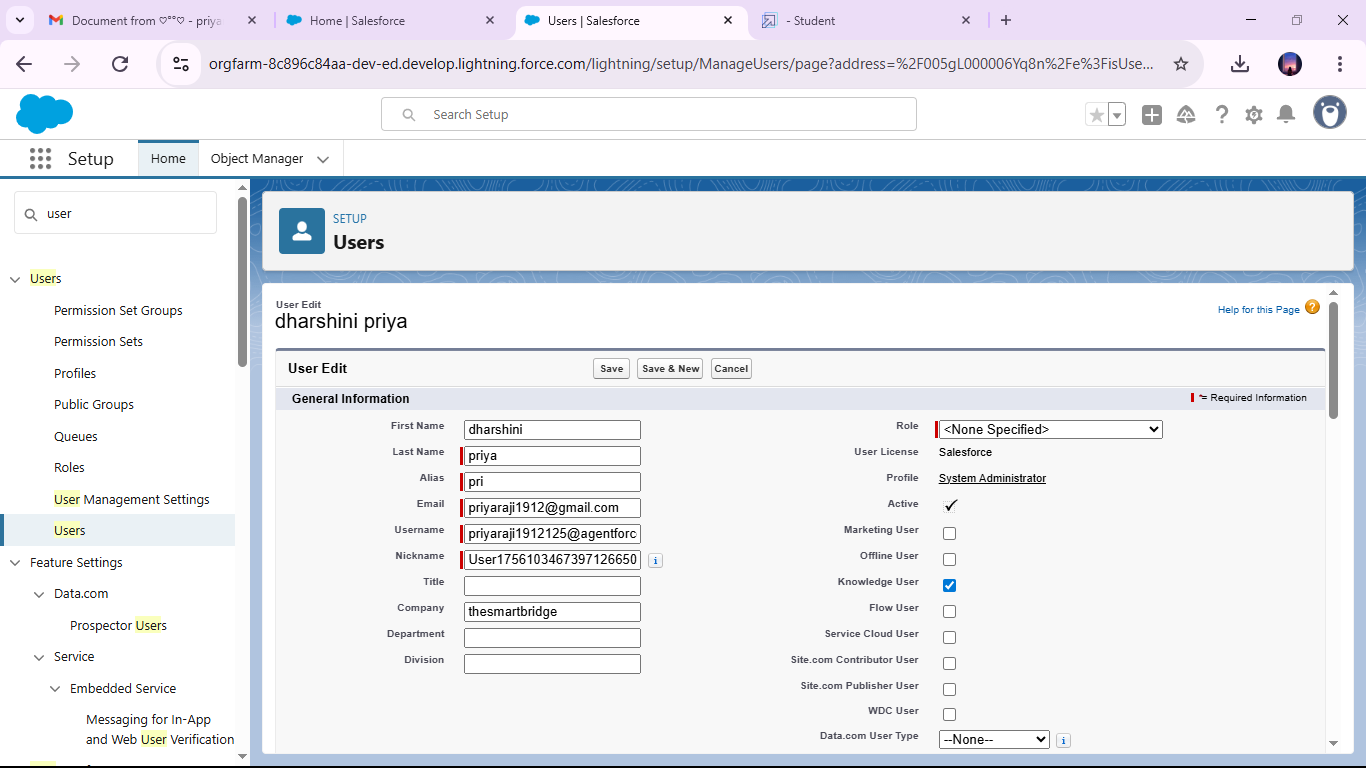
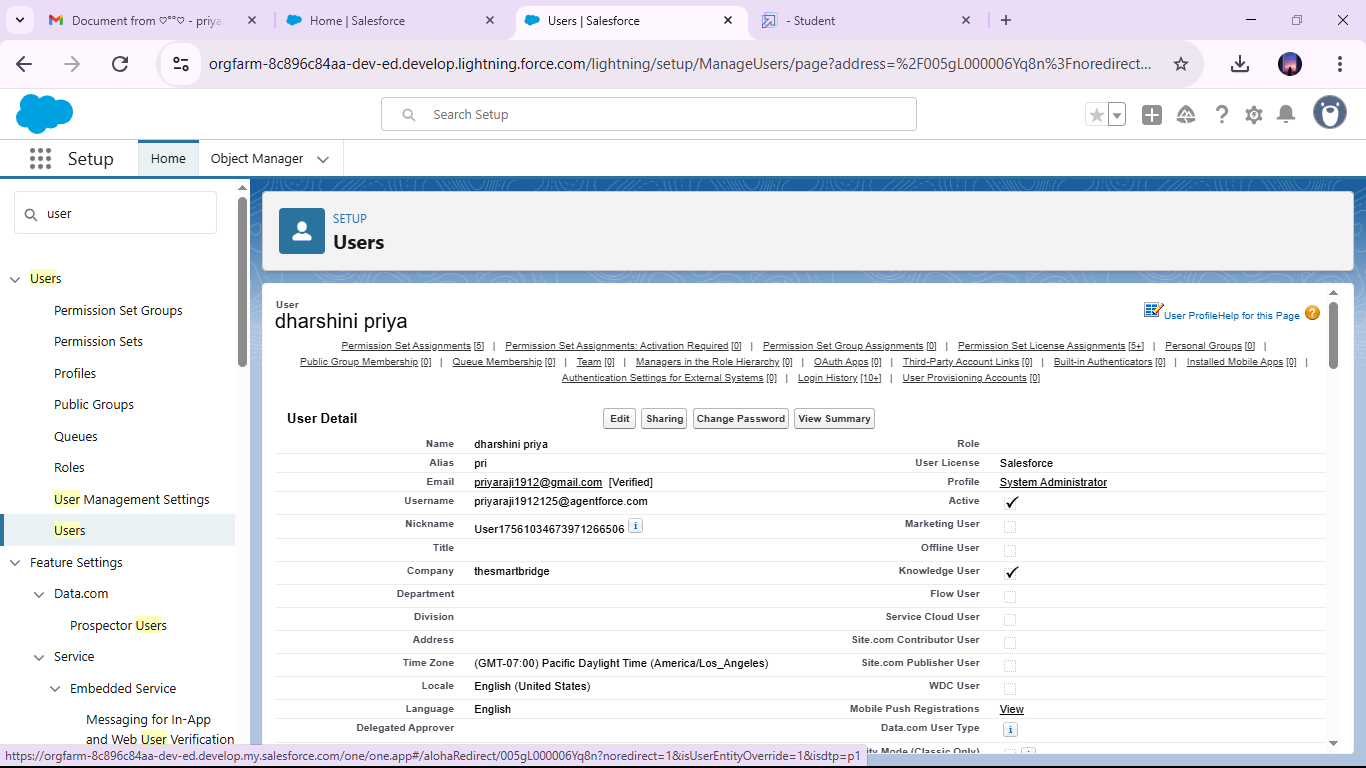
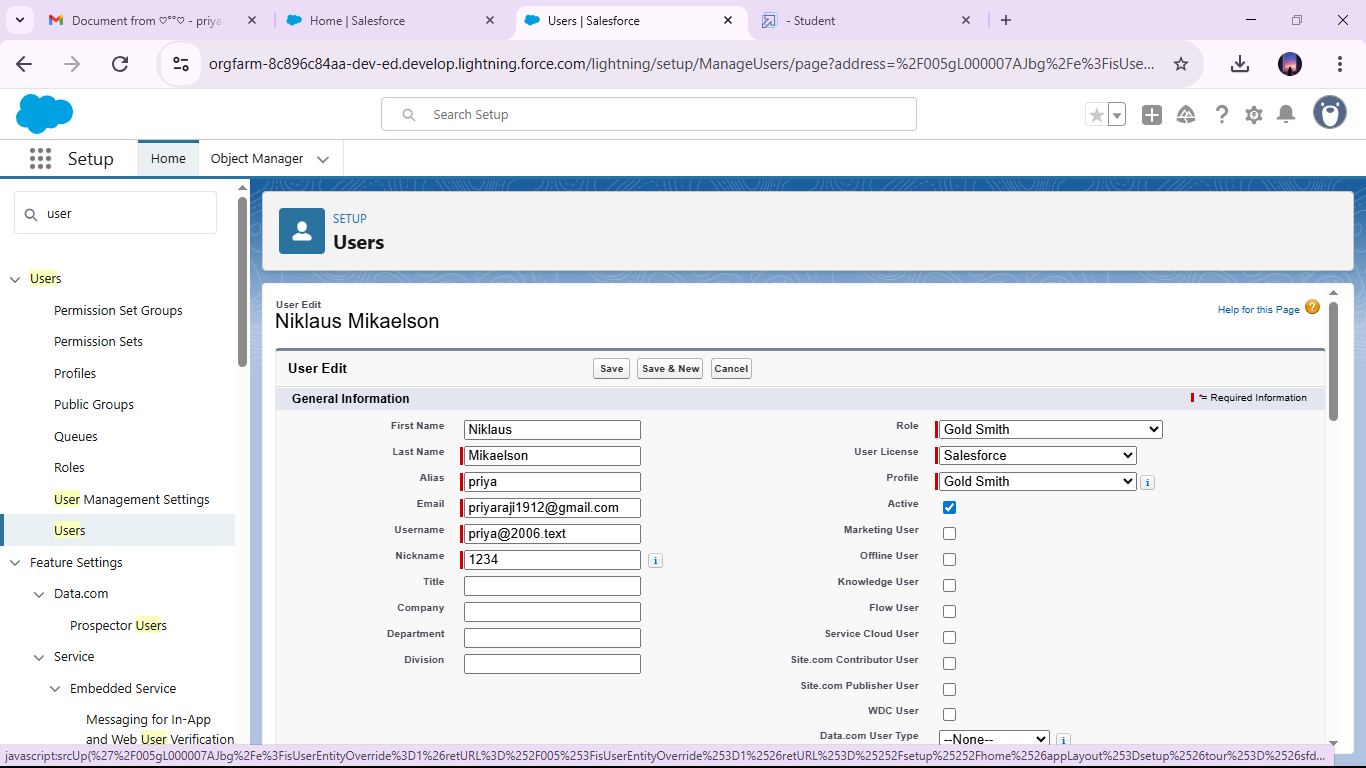
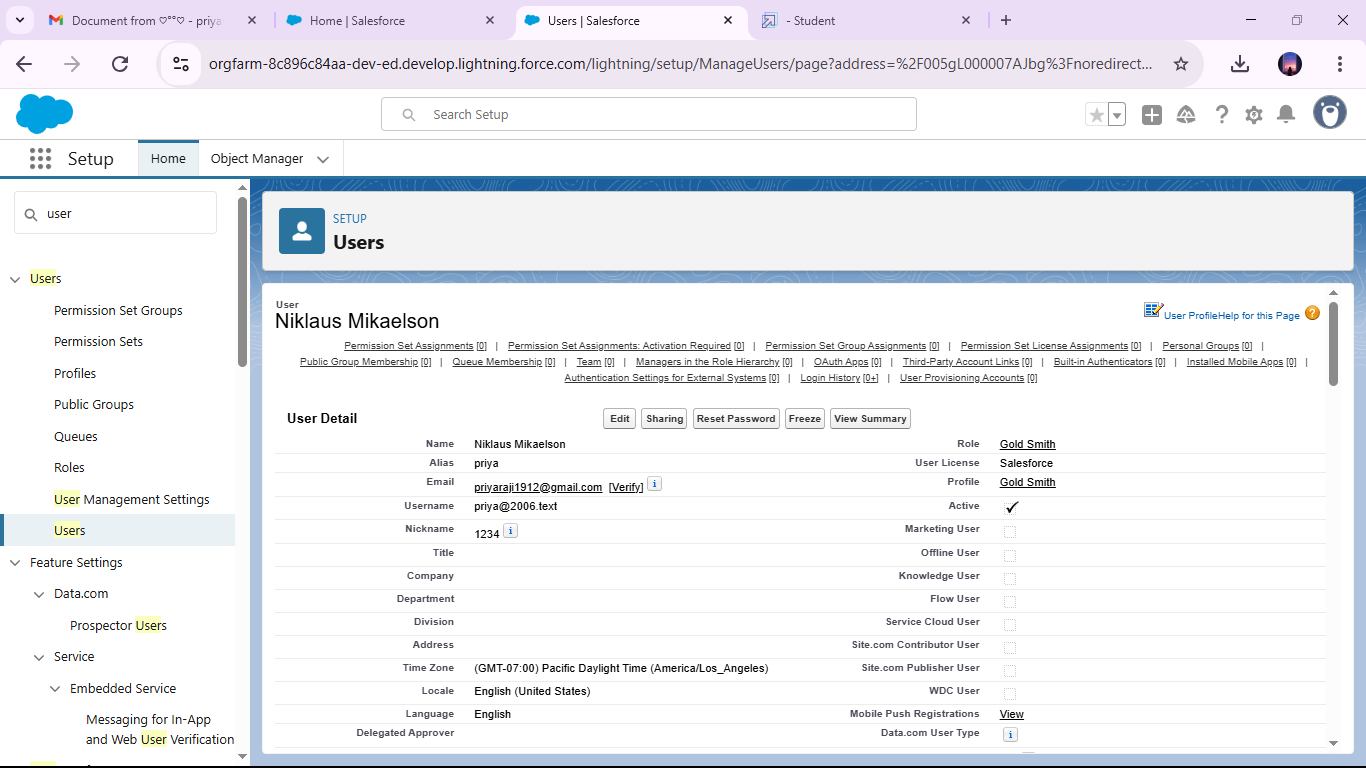
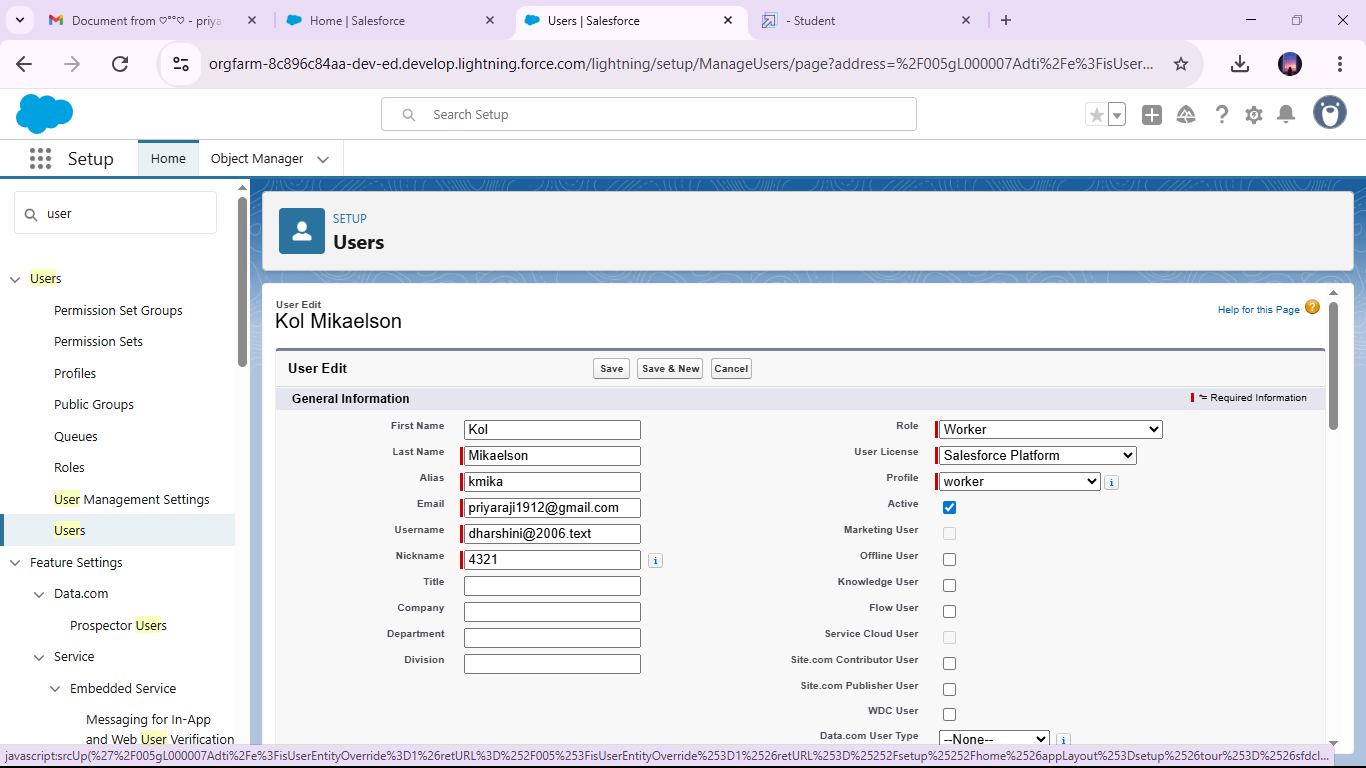


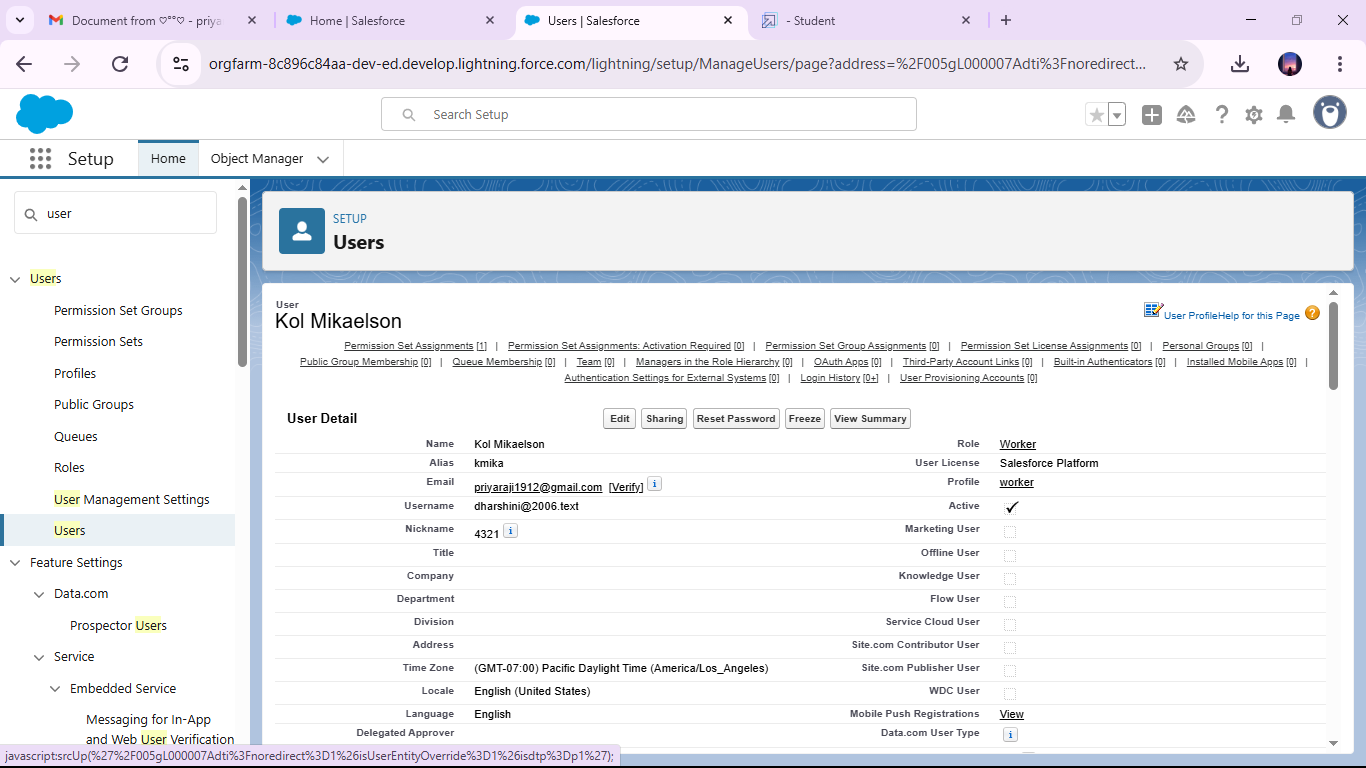
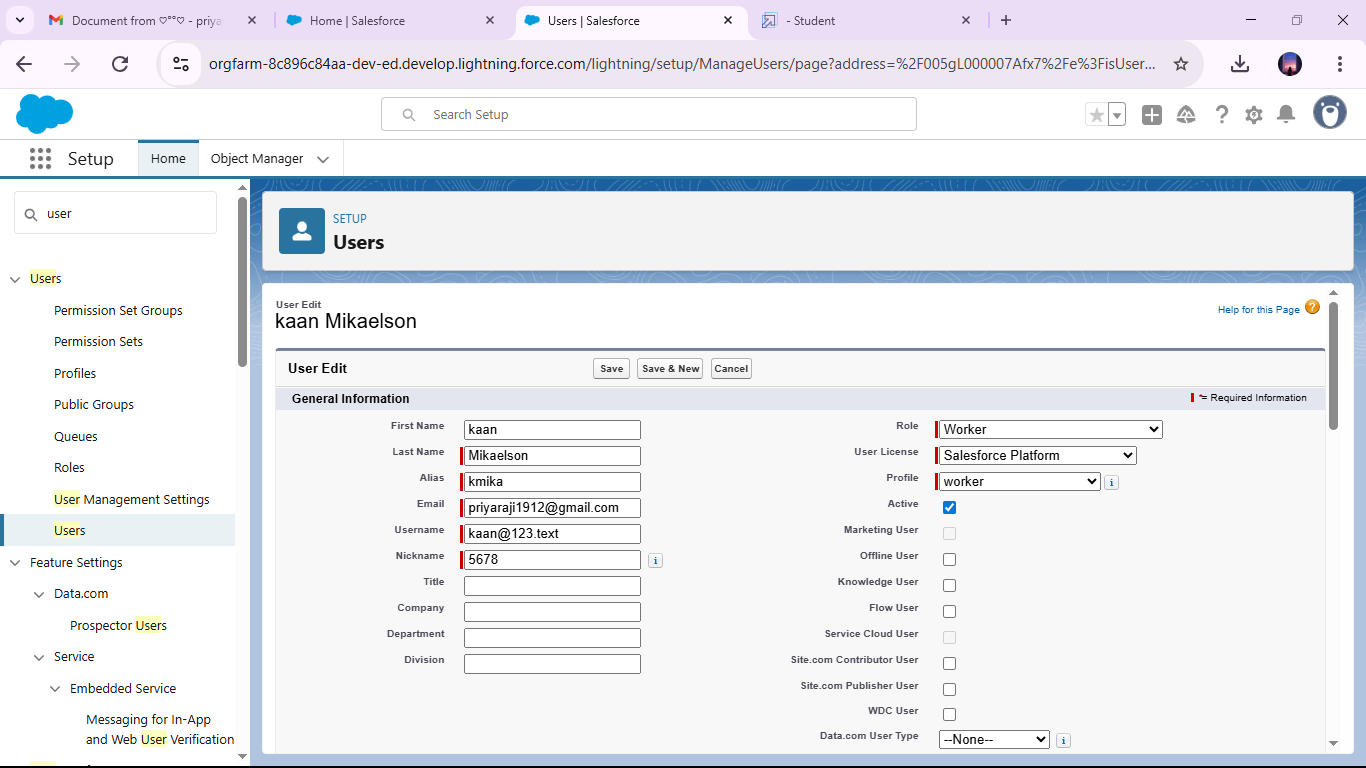
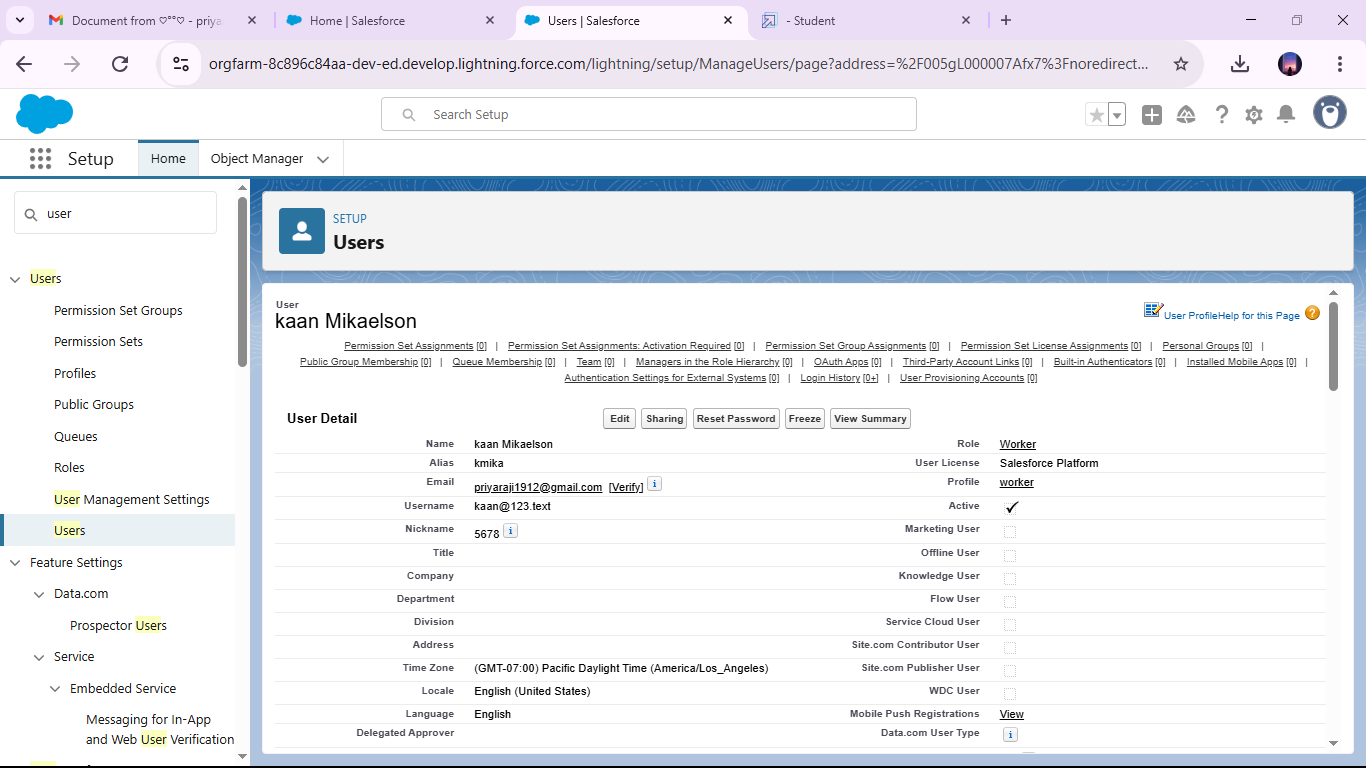
### Created one more role as Worker which reports to Gold Smith



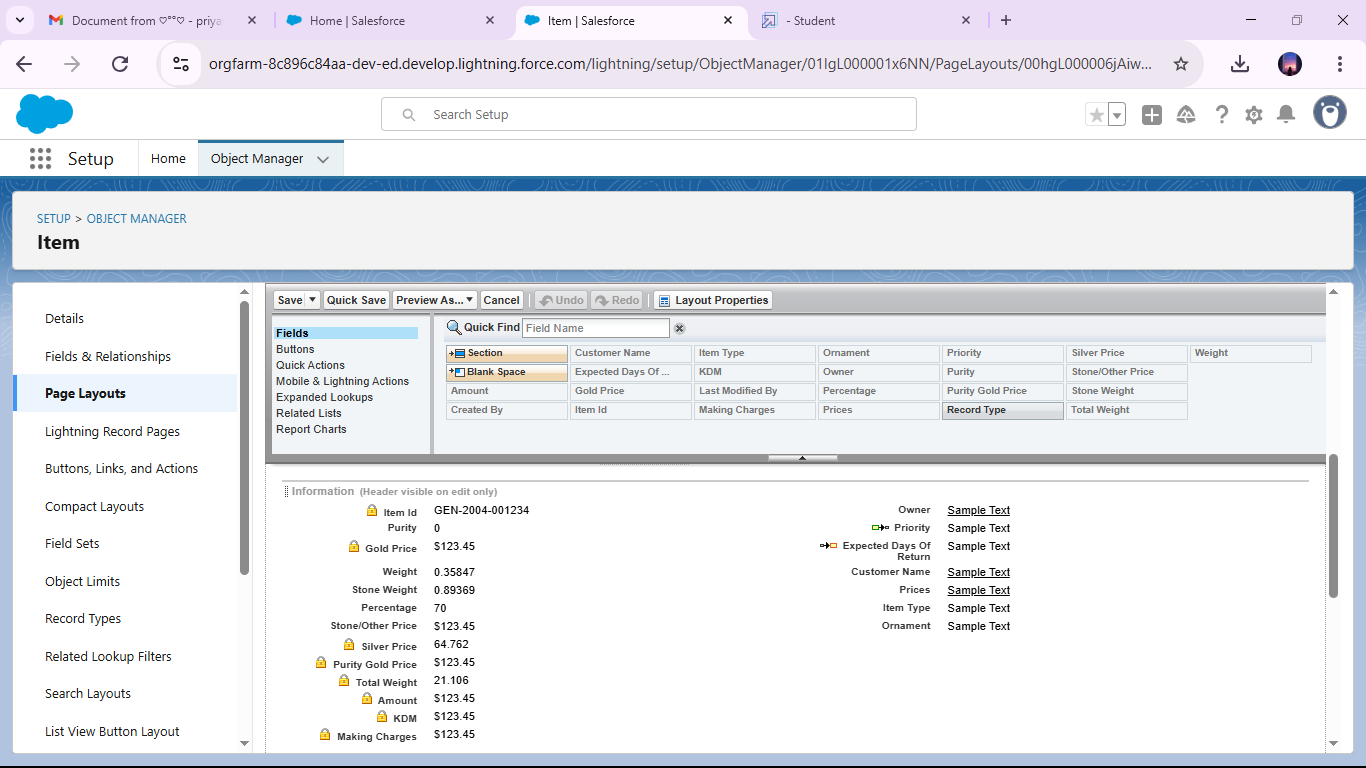
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### Created Users

### To create a gold page layout



### To create a silver page layout

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### Created a record type for gold and silver

### image (7).png

### image (8).png

### image (9).png

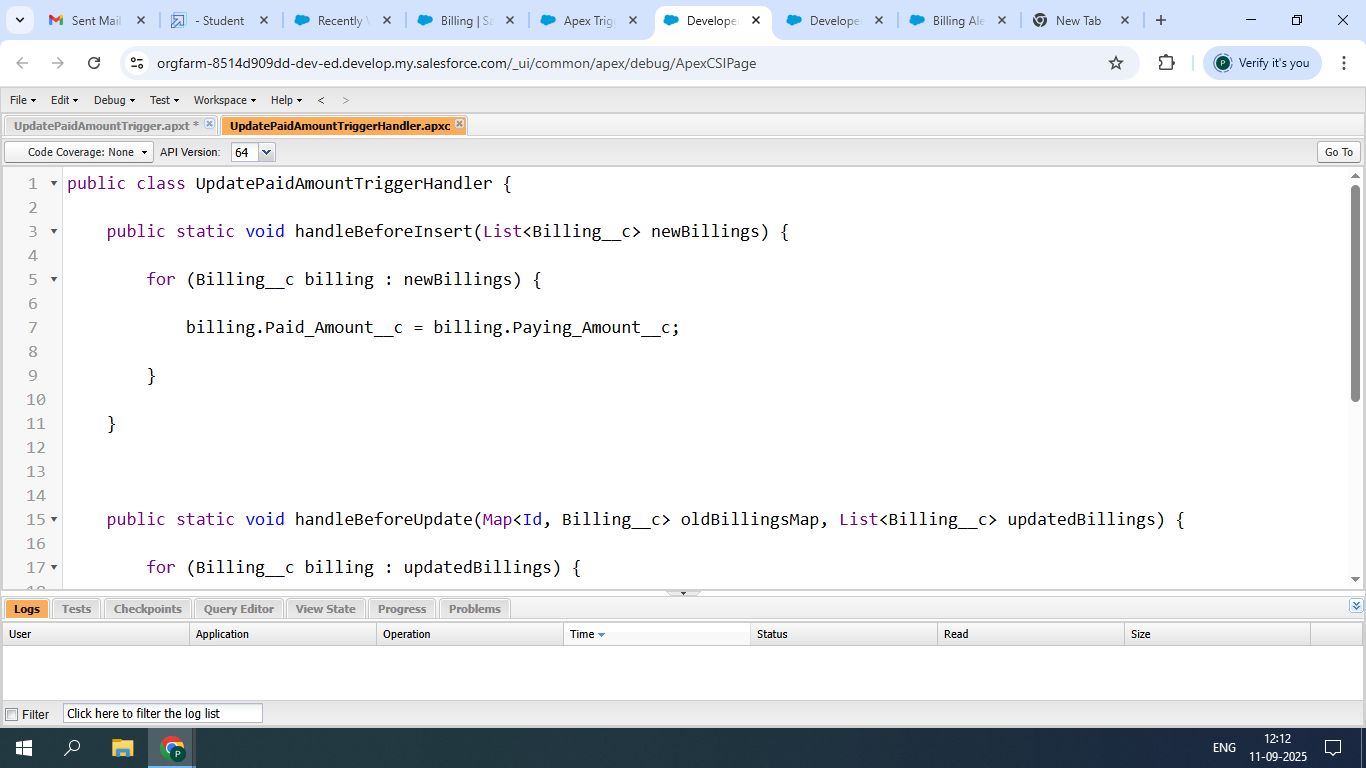
### image (10).png

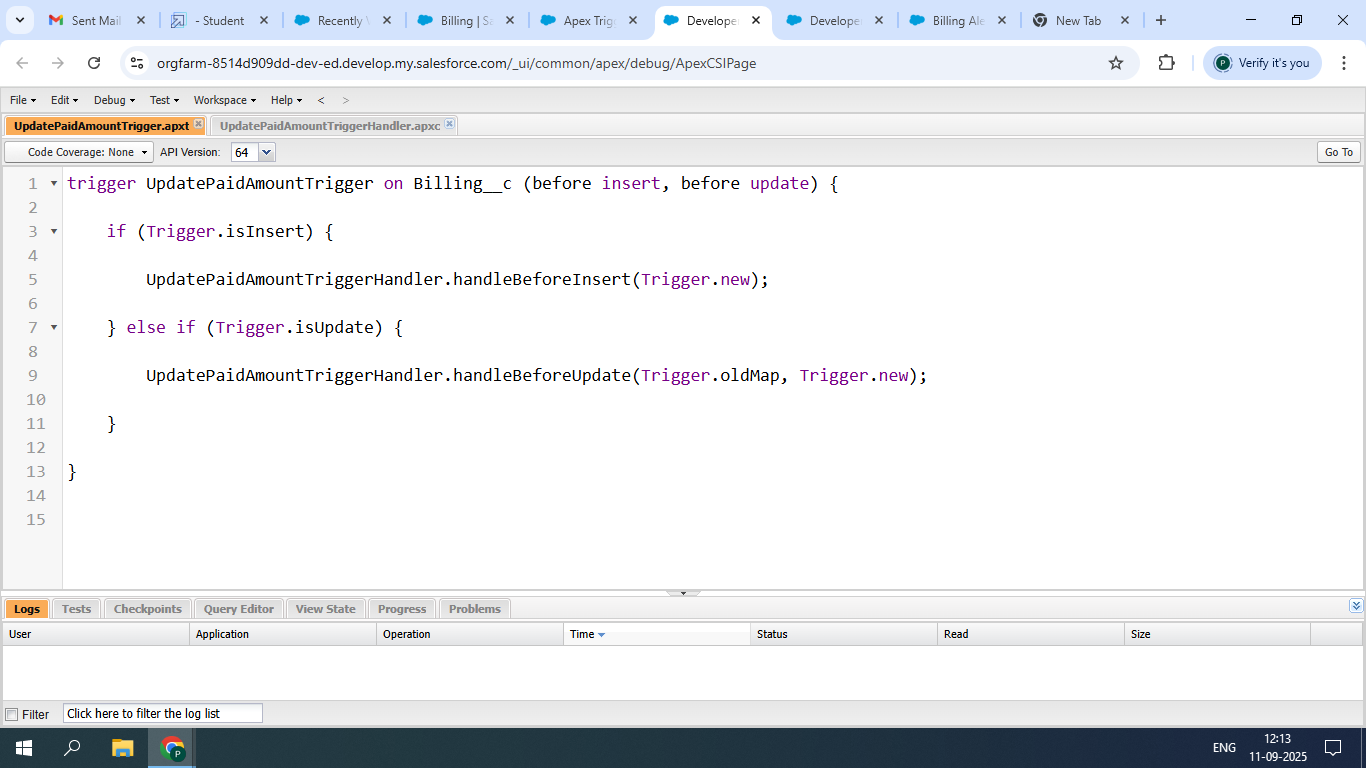
### Creating permission set

### image (11).png

### image (12).png

### Created a trigger handler class



* Created the trigger

### Created a record (Jewel Customer)

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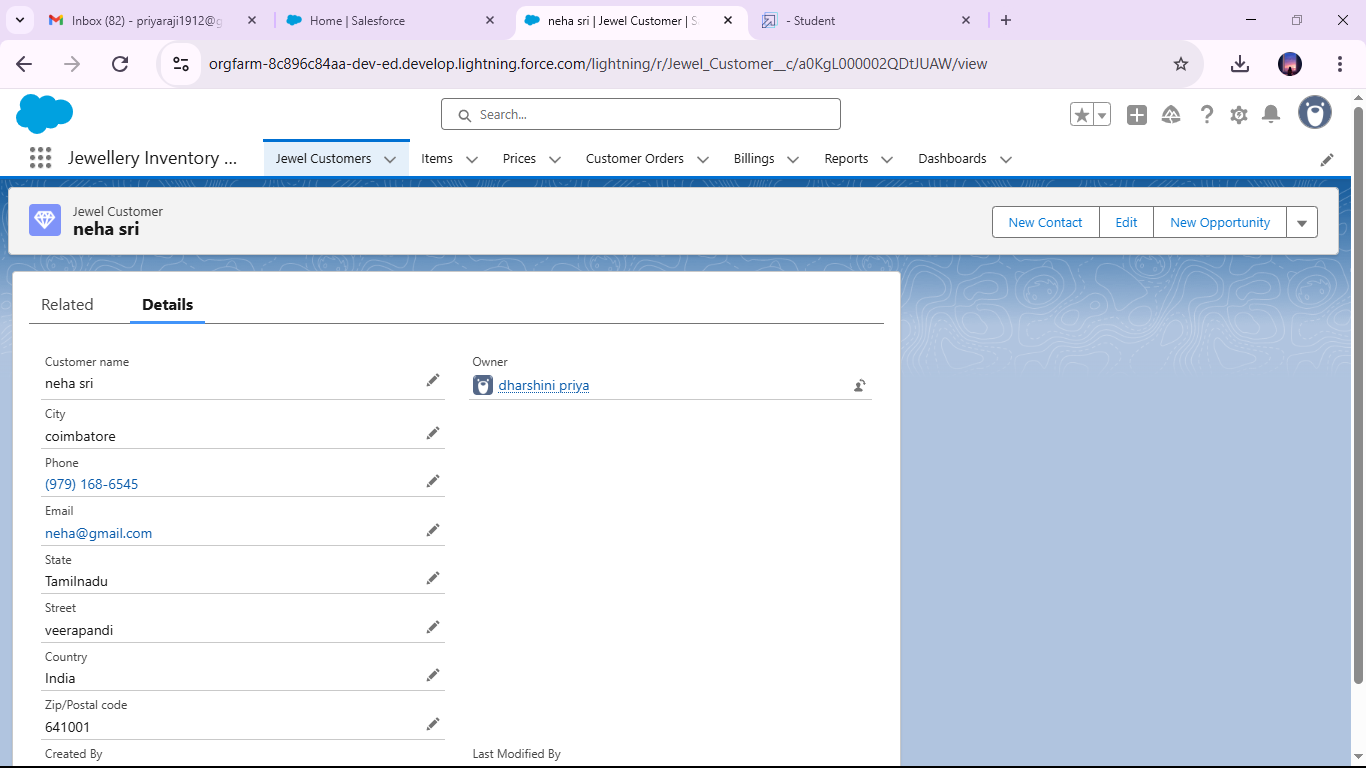
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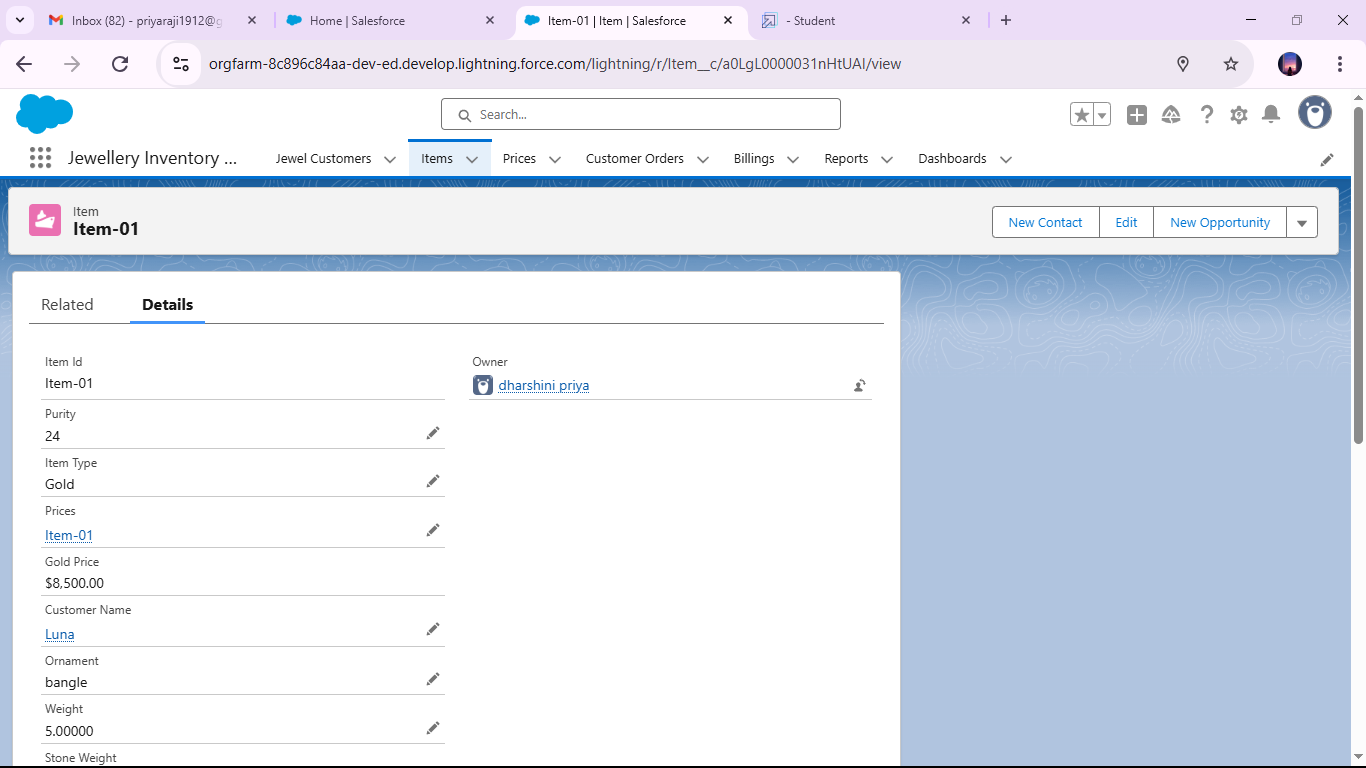
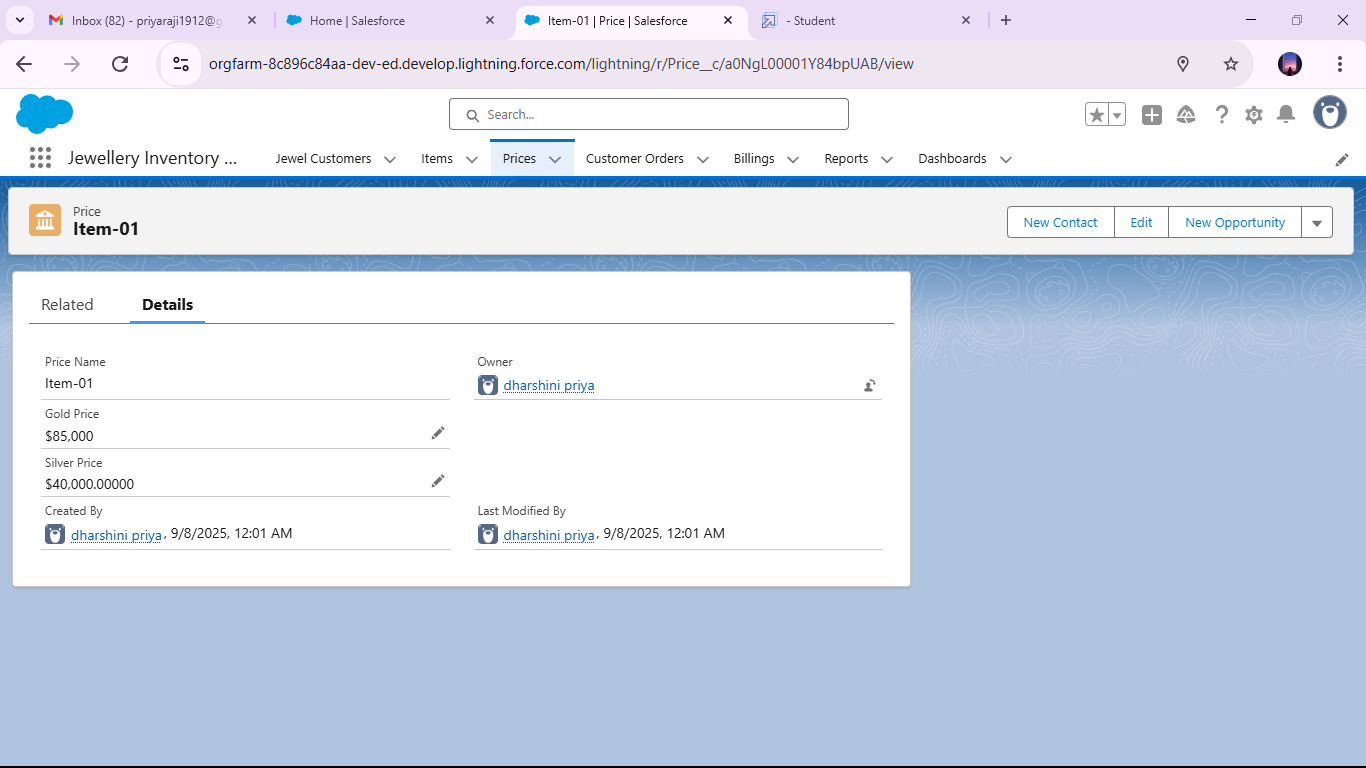
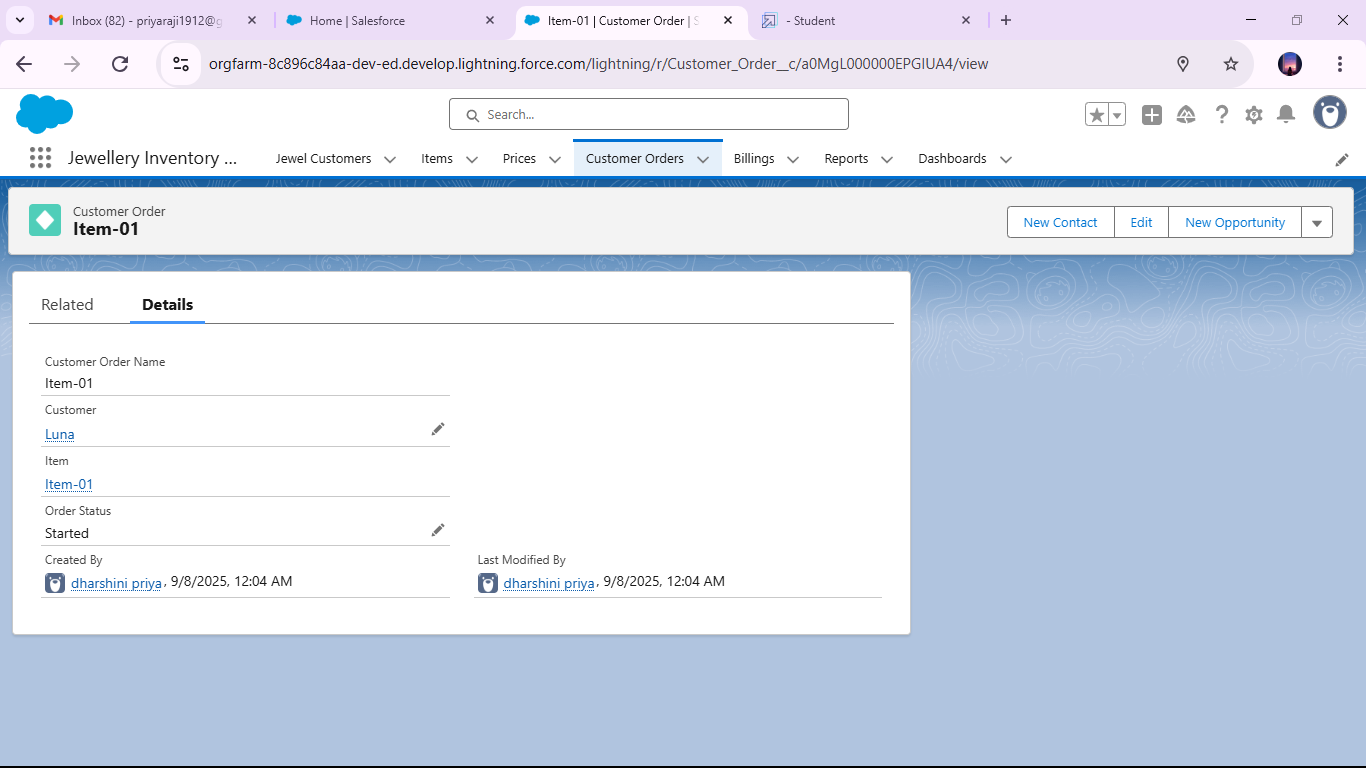
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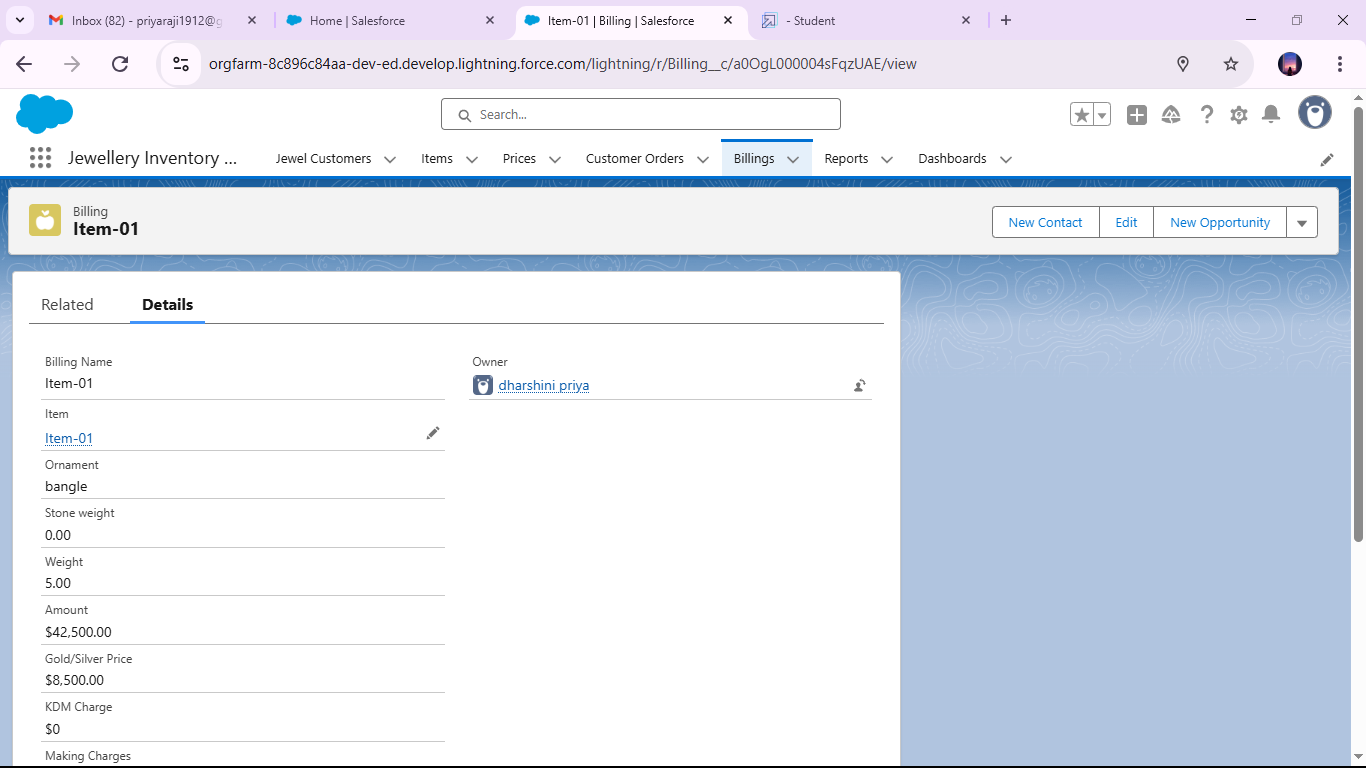
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### Viewing a record (Jewel Customer)





### Created report

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### Created dashboard

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CONCLUSION

The Jewelry CRM successfully integrates Jewel Customer, Customer Order, Items,Price, and Billing objects into one streamlined system. With validation rules ensuring data accuracy and record-triggered flows with actions and email alerts providing automation, the system improves efficiency and customer satisfaction.