

PROJECT TITLE: CRM APPLICATION FOR JEWEL MANAGEMENT

College Name: Aditya College of Arts & Science (641107)

College Code: brubh

Team ID: NM2025TMID26126

TEAM MEMBERS:

Team Leader Name : Balaji D

Email : finixbalaji96@gmail.com

Team Member Name : Boopathi G

Email : boopathiboopathi6600@gmail.com

Team Member Name : Dhivya dharshini k

Email: dhivyadharshini165@gmail.com

Team Member Name : Dinesh kumar T

Email : dineshkumart077@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>

Object Created


Jewel customer – To store and manage information about customer.



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




Agentforce

Steps

1 Select type

Customer Support



Sign up for your Developer Edition

A free Salesforce Platform environment with Agentforce and Data Cloud

First name

k.dhivya

Last name

dharshini

Job title

Developer

Work email

dhivyadharshini165@gmail.com

Company

ADITHYA 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 45 days.

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

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

Details

EditDelete

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

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

Home 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

EditDelete

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

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

elop.lightning.force.com

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](#)

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.

Home elop.lightning.force.com + 5

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.

Roles

Creating the Role Hierarchy

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**
 - CFO** 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 displays the Salesforce Setup interface for managing users. The top navigation bar shows the Salesforce logo and the URL 'elop.lightning.force.com'. Below the navigation bar, the 'Setup' tab is selected, and the 'Users' section is highlighted in the left sidebar. The main content area is titled 'All Users' and provides instructions on how to create, view, and manage users. A table lists the current users, including their full names, aliases, usernames, roles, and active status. The table includes columns for 'Action', 'Full Name', 'Alias', 'Username', 'Role', 'Active', and 'Profile'. The users listed are Chatter Expert, EPIC OrgFarm, Mikaelson, Koi, Mikaelson, Niklaus, R. Renuga.sri, User Integration, and User Security. The bottom of the page shows a pagination bar with 'All' selected.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dgl000009xqefua2.xc92e7qw7q6v@chatter.salesforce.com		✓	Chatter Frs User
<input type="checkbox"/> Edit	EPIC OrgFarm	OEPIE	epic.ce436a7388ae@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Mikaelson, Koi	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 us 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.

The screenshot shows the Salesforce Setup interface. At the top, the browser address bar displays 'elop.lightning.force.com'. Below the browser bar, the Salesforce navigation bar includes a search bar labeled 'Search Setup' and a navigation menu with 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' section is active, showing a breadcrumb 'SETUP > OBJECT MANAGER' and the title 'Item'. On the left, a sidebar lists various setup categories, with 'Page Layouts' selected. The main content area is titled 'Page Layouts' and shows '3 Items, Sorted by Page Layout Name'. It includes a 'Quick Find' search bar, a 'New' button, and a 'Page Layout Assignment' button. A table lists the page layouts:

PAGE LAYOUT NAME...	CREATED BY	MODIFIED BY	
Item Layout	Renuga sri R, 8/31/2025, 1:53 AM	Renuga sri R, 8/31/2025, 11:13 PM	▼
Page Layout for Gold	Renuga sri R, 9/1/2025, 6:48 AM	Renuga sri R, 9/1/2025, 6:53 AM	▼
Page Layout for Silver	Renuga sri R, 9/1/2025, 6:59 AM	Renuga sri R, 9/1/2025, 7:01 AM	▼

Record Types – Record types are a way of grouping many records of one type for that object. Record types allow administrators to create a different page layout with custom picklist fields and values for the same business process and various business process.











elop.lightning.force.com

+

4

⋮





Search Setup

SetupHomeObject 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

User Adoption – you perform user management tasks like creating and editing users, resetting passwords, granting permissions, configuration data access and much more.

The screenshot displays the Salesforce Lightning interface. At the top, the browser address bar shows 'elop.lightning.force.com'. Below the browser, the Salesforce navigation bar includes a search bar and a menu with options: Jewellery Inventory, Jewel Customers (selected), Items, Prices, Orders, Billings, Reports, and More. The main content area is titled 'Jewel Customers' and features a 'Recently Viewed' section. It shows a list of 10 items, each with a checkbox and a dropdown menu. The items are: 1. durga, 2. pavi, 3. rasika, 4. suji, 5. gowsik, 6. gowtham, 7. moorthy, 8. dhanam, 9. Renuga, and 10. Sample 1. The interface also includes buttons for 'New', 'Import', 'Change Owner', and 'Assign Label', and a search bar for the 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”.


The screenshot shows the Salesforce Lightning Setup interface. The browser address bar displays 'force.lightning.force.com'. The Setup menu is open, and the 'Profiles' page is selected. The page title is 'SETUP Profiles'. The left sidebar shows the 'Users' section with 'Profiles' highlighted. The main content area displays a table of profiles with columns for Action, Profile Name, User License, and Custom. The table lists various profiles such as 'Analytics Cloud Integration User', 'Authenticated Website', 'B2B Reordering Portal Buyer Profile', 'Chatter External User', 'Chatter Free User', 'Chatter Moderator User', 'Contract Manager', 'Cross Org Data Proxy User', 'Custom: Marketing Profile', 'Custom: Sales Profile', 'Custom: Support Profile', 'Customer Community Login User', 'Customer Community Plus Login...', 'Customer Community Plus User', 'Customer Community User', 'Customer Portal Manager Custom', 'Customer Portal Manager Standard', 'Einstein Agent User', 'External Apps Login User', 'External Identity User', 'Force.com - App Subscription User', and 'Force.com - Free User'. The 'Custom' column has checkboxes for each profile, with some checked (e.g., 'B2B Reordering Portal Buyer Profile', 'Custom: Marketing Profile', 'Custom: Sales Profile', 'Custom: Support Profile').


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

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....,






Setup

Home

Object Manager


Apps

App Manager

External Client Apps

External Client App Manager

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


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 N...	Description	Last Modifie...	App ...	Vi...	
1	All Tabs	AllTabSet		8/24/2025, 2:2...	Classic		
2	Analytics Studio	Insights	Build CRM Anal...	8/24/2025, 2:2...	Classic	✓	
3	App Launcher	AppLauncher	App Launcher t...	8/24/2025, 2:2...	Classic	✓	
4	Approvals	Approvals	Manage appro...	8/24/2025, 2:2...	Lightning	✓	
5	Automation	FlowsApp	Automate busi...	8/24/2025, 2:2...	Lightning	✓	
6	Bolt Solutions	LightningBolt	Discover and ...	8/24/2025, 2:2...	Lightning	✓	
7	Community	Community	Salesforce CR...	8/24/2025, 2:2...	Classic	✓	
8	Content	Content	Salesforce CR...	8/24/2025, 2:2...	Classic	✓	
9	Data Cloud	Audience360	Build a thoroug...	8/24/2025, 2:2...	Lightning	✓	
10	Data Manager	DataManager	Use Data Mana...	8/24/2025, 2:2...	Lightning	✓	
11	Digital Experien...	SalesforceCMS	Manage conte...	8/24/2025, 2:2...	Lightning	✓	
12	Jewellery Inven...	Jewellery_Inve...	Elevate your lo...	8/31/2025, 2:2...	Lightning	✓	
13	Lightning Usag...	LightningInstru...	View Adoption ...	8/24/2025, 2:2...	Lightning	✓	
14	Marketing CRM...	Marketing	Track sales an...	8/24/2025, 2:2...	Classic	✓	
15	My Service Jou...	MSJApp	Discover new c...	8/24/2025, 2:2...	Lightning	✓	
16	Platform	Platform	The fundament...	8/24/2025, 2:2...	Classic		
17	Queue Manage...	QueueManage...	Create and ma...	8/24/2025, 2:2...	Lightning	✓	
18	Sales	Sales	The world's mo...	8/24/2025, 2:2...	Classic		
19	Sales	LightningSales	Manage your s...	8/24/2025, 2:2...	Lightning	✓	
20	Sales Cloud Mo...	SalesCloudMob...	New seller foc...	8/24/2025, 2:2...	Lightning	✓	
21	Sales Console	LightningSales...	(Lightning Exp...	8/24/2025, 2:2...	Lightning	✓	
22	Salesforce Cha...	Chatter	The Salesforce...	8/24/2025, 2:2...	Classic	✓	
23	Salesforce Sch...	LightningSched...	Set up persona...	8/24/2025, 2:2...	Lightning	✓	
24	Service	Service	Manage custo...	8/24/2025, 2:2...	Classic	✓	
25	Service Console	LightningService	(Lightning Exp...	8/24/2025, 2:2...	Lightning	✓	
26	Site.com	Sites	Build pixel-perf...	8/24/2025, 2:2...	Classic		
27	Subscription M...	RevenueCloudC...	Get started aut...	8/24/2025, 2:2...	Lightning	✓	

Text field: A Text field is used whenever you need to capture describe or alphanumeric details that identify, describe, or provide context about jewel items, supplier, or transaction.

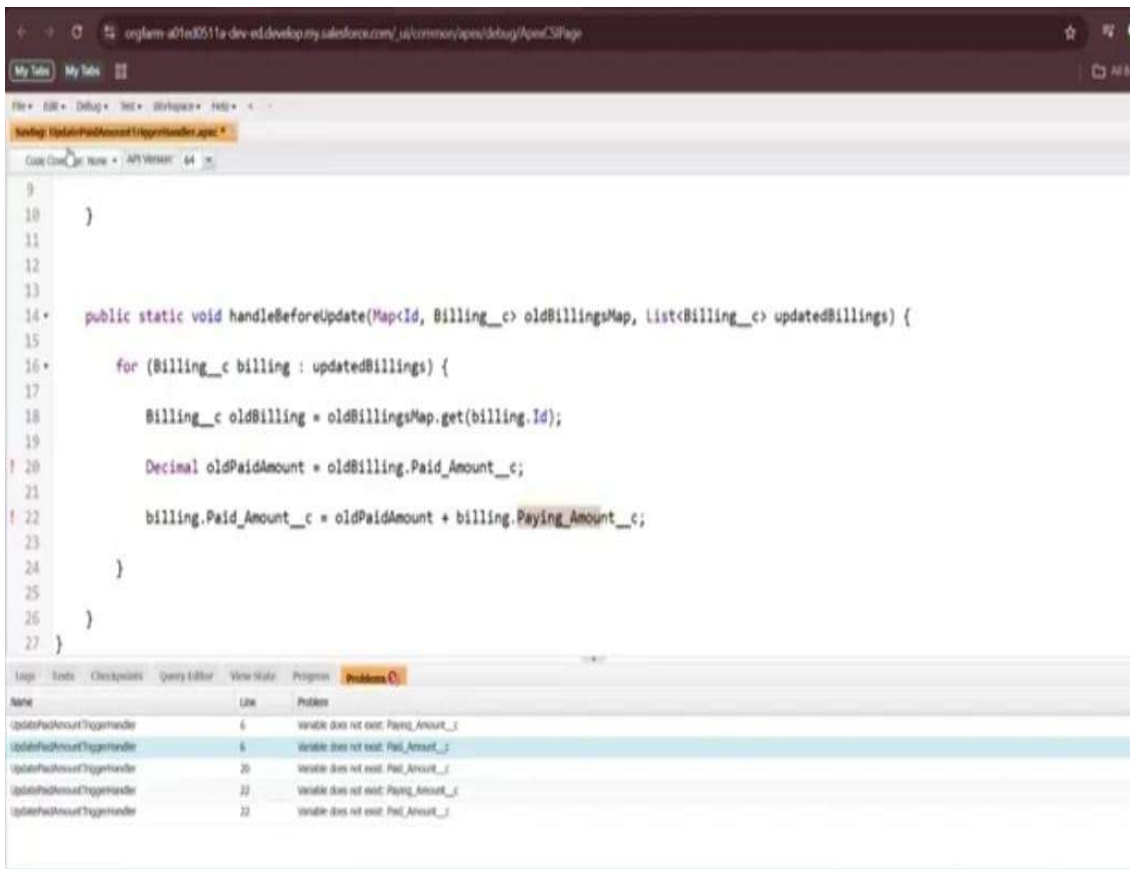
Apex class – auto calculate total cost from order items.



The screenshot shows an Apex class named `UpdatePaidAmountTriggerHandler` in the Salesforce IDE. The class has two static methods: `handleBeforeInsert` and `handleBeforeUpdate`. The `handleBeforeInsert` method iterates over a list of `Billing__c` objects and sets `Paid_Amount__c` to `Paying_Amount__c`. The `handleBeforeUpdate` method iterates over a list of `Billing__c` objects and sets `Paid_Amount__c` to `Paid_Amount__c`.

```
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;
12         }
13     }
14 }
```

Apex trigger – auto calculate total cost from order item.

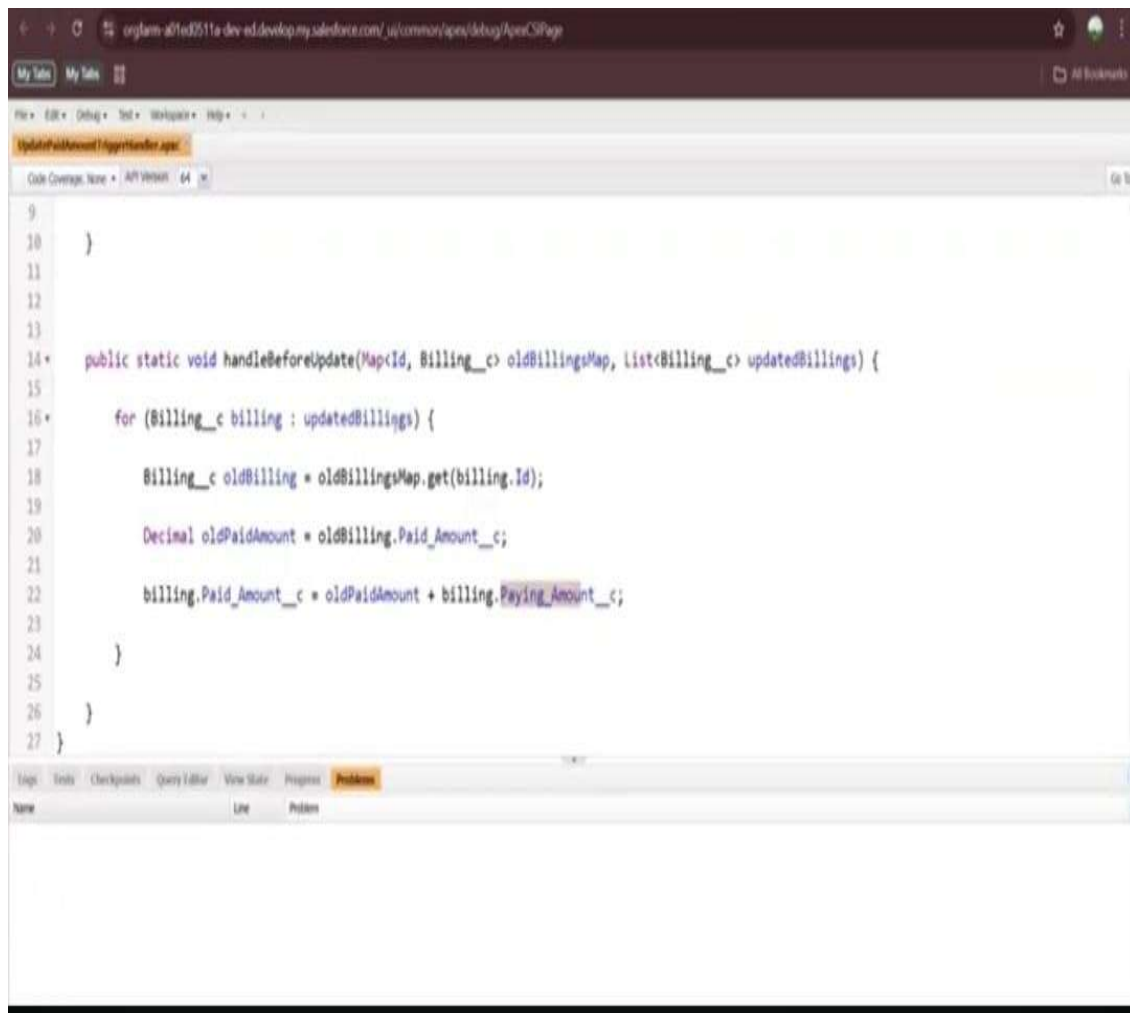


The screenshot shows an Apex trigger named `UpdatePaidAmountTriggerHandler.apex` in the Salesforce IDE. The trigger has a `beforeUpdate` event and a `handleBeforeUpdate` method. The method iterates over a list of `Billing__c` objects and sets `Paid_Amount__c` to `Paid_Amount__c`. The IDE shows several error messages in the Problems panel, indicating that the variable `Paid_Amount__c` does not exist.

```
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.



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




elp.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 sri 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.

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

Report: Prices
New Prices Report

Enable Field Editing

Add Chart

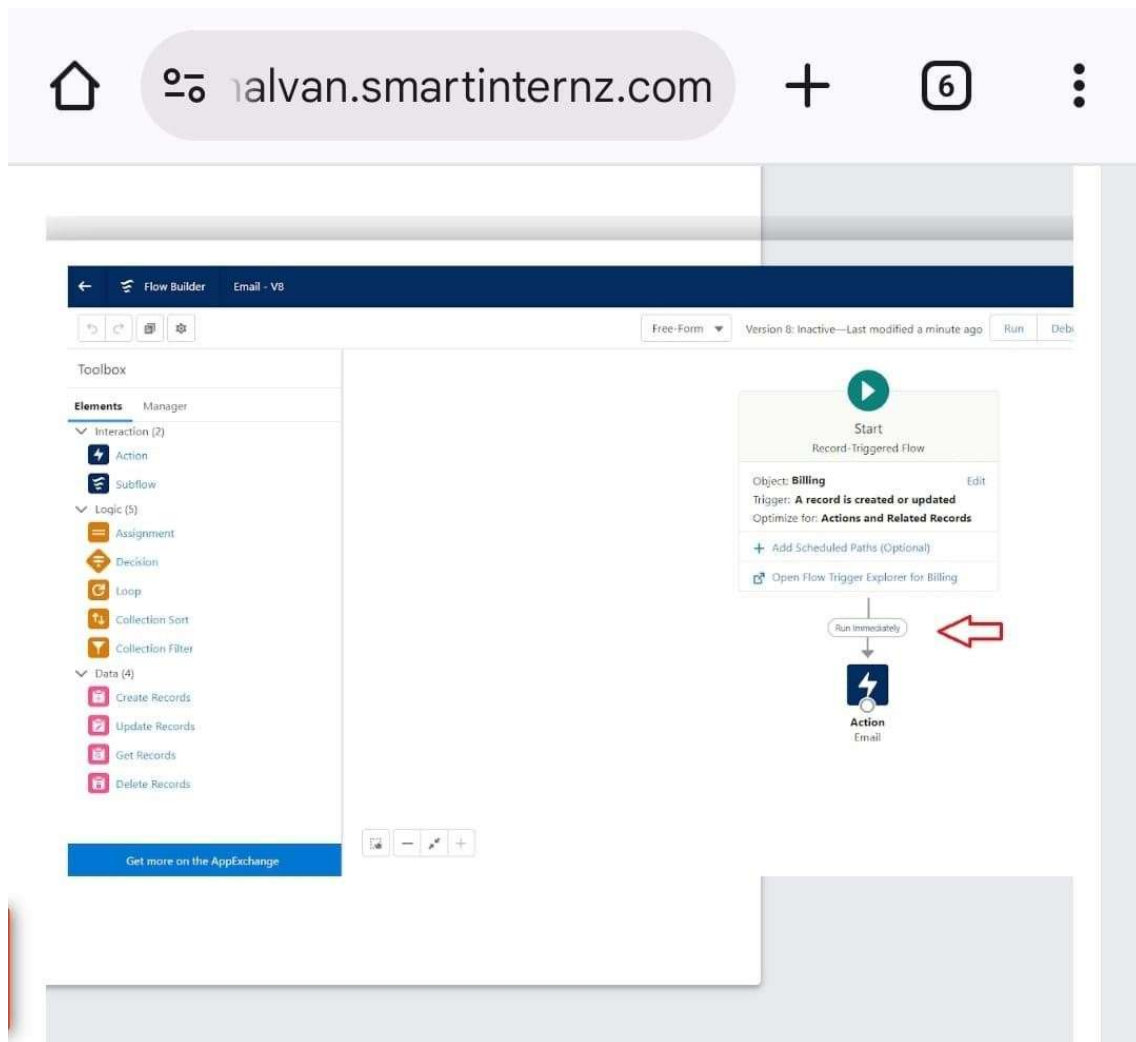
Edit

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

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

6. Appendix

Create A Trigger Handler Class :

```
public class UpdatePaidAmountTriggerHandler {

    public static void handleBeforeInsert(List<Billing__c> newBillings) {

        for (Billing__c billing : newBillings) {

            billing.Paid_Amount__c = billing.Paying_Amount__c;

        }

    }

}
```

```
public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap,  
List<Billing__c> updatedBillings) {
```

```
    for (Billing__c billing : updatedBillings) {
```

```
        Billing__c oldBilling = oldBillingsMap.get(billing.Id);
```

```
        Decimal oldPaidAmount = oldBilling.Paid_Amount__c;
```

```
        billing.Paid_Amount__c = oldPaidAmount + billing.Paying_Amount__c;
```

```
    }
```

```
}
```

```
}
```

Create The Trigger :

```
Trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update)  
{
```

```
    If (Trigger.isInsert) {
```

```
        UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);
```

```
    } else if (Trigger.isUpdate) {  
  
        UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap,  
Trigger.new);  
  
    }  
  
}
```