

SALESFORCE ADMINISTRATION

Project Title :- CRM JEWELRY

COLLEGE:- Sri shankrananda Giri Swamy Degree college

| Team Leader :

Gattuvinakumar: Gattuvinakumar89@gmail.com

| Team Members:

1.K A Galignaneswar:

galignaneswar80@gmail.com

2.K Kiran: kurubakiran5@gmail.com

3.J Janardhan :

janardha.jilakara1013@gmail.com

4.J Karan Modi:

karanmodi23082003@gmil.com

(1) Project Overview:-

A “**CRM Jewelry Management project**” aims to achieve several key objectives that ultimately contribute to the growth and efficiency of a jewelry business. The system specifically designed for jewelry business, allowing them To effectively track customer interactions, manage sales leads, and personalize marketing efforts optimize customer relationship and boost sales within the jewelry industry.

- Capture detailed customer information including demographics, purchase history, preferred jewelry types, special occasions, and contact details
- Store and update customer data in real time to maintain accuracy

the purpose of a CRM (Customer Relationship Management) system is to help businesses manage and improve their interactions with customers and potential customers. This overarching goal breaks down into several key objectives.

CRM, or Customer Relationship Management, is a multifaceted concept that's essential for modern businesses. It's not just a piece of software it's a strategic approach to how a company interacts with its customers.

The relationship between CRM (Customer Relationship Management) and CLV (Customer Lifetime Value) is very strong. CRM systems provide the tools and data necessary to effectively calculate, track, and ultimately increase CLV.

(2) Objectives :-

Business Goals :

The primary objectives of a Customer Relationship Management (CRM) system are to enhance customer satisfaction, increase sales, improve customer retention, and build strong customer loyalty by effectively managing customer interactions and data across all touchpoints, ultimately achieving business goals like increased revenue, market share, and profitability.

CRM (Customer Relationship Management) systems serve a variety of business goals, all designed to improve customer interactions and drive growth.

The four main objectives of a CRM

- ❖ Increase customer retention.
- ❖ Shorten the sales cycle.
- ❖ Increase sales.
- ❖ Decrease customer acquisition.

Specific outcomes :-

A CRM implementation for a jewelry business aims to drive tangible results through enhanced customer engagement and operational efficiency. There are unique considerations that will influence the specific outcomes and key deliveries.

(3) Salesforce Key Features and Concepts Utilized:-

Salesforce is a cloud-based CRM platform that provides various features and concepts to help businesses manage customer relationships, sales, and operations. Here are some key features and concepts utilized in Salesforce

- ❖ Key features of Salesforce CRM include: contact management, lead management, opportunity management, sales forecasting, reporting and dashboards, automation through workflows, collaboration tools, cloud-based access, mobile accessibility, AI integration, campaign management, and a single source of truth for customer data, allowing businesses to track and manage customer interactions across all channels effectively; with core concepts like lead qualification, opportunity stages, and customer lifecycle management central to the platform.

★ We used the following **Objects** :-

- ❖ Jewel Customer
- ❖ Items
- ❖ Billing
- ❖ Prices
- ❖ Customer order

★ We used **Tabs** such as

- ❖ Jewel Customer Tab
- ❖ Item Tab .. Etc.

★ We Created a Lightning App :- **Jewellery Inventory System**

➤ We Created Fields such as :-

- ◆ *Lookup Relationship*
- ◆ *Master-Detailed Relationship*
- ◆ *Text, Phone, Email Fields in Jewel Customer Object*
- ◆ *Number Picklist Fields in Item Object*
- ◆ *Currency Fields in Price Object*
- ◆ *Formula Field (cross object)in Item Object*

- ◆ ***Also Created some other Fields.***

★ Schema Builder:-

The schema builder is a simple graphical interface for visualizing and editing the data model of your Org. The schema builder can get all fields from an Object, perform basic impact analysis of changes to an Object, and show all dependencies on an Object.

→ **We Entered object as :-**

- ❖ **Jewel Customer**
- ❖ **Items**
- ❖ **Customer order**
- ❖ **Prices**
- ❖ **Billing in Schema Builders**

★ Field Dependencies:-

Field dependency can refer to a cognitive style, a relationship between fields in a dialog, or a dependency injection technique. Field Dependencies are used to create relationships between fields within an object. They allow you to control the visibility and availability of fields based on the values selected in other fields.

We created New Field Dependencies, controlling as "Priority"& Depending Field as "Expecting Days of Return".

★ Validation Rules :-

A validation rule is one way to restrict input in a table field or a control on a form. Validation text lets you provide a message to help users who input data that is not valid.

Created the validation rule for Postal Code field in Jewel Customer object.

★ Profiles:

We Created 2 Profiles:

- **Gold Smith profile**
- **Worker profile**

★ Roles:-

Salesforce roles are record-level access controls that define what data a user can see in Salesforce. Roles can be used to determine the visibility access of the user and the data they can access in your Salesforce CRM organization.

Added Goldsmith role in CEO Role & Added Worker Role which reports to Goldsmith.

★ Users: -

A user in Salesforce is anyone who logs in to the platform, including employees, customers, partners, and automated users.

- ★ **Niklaus Mikaelson in Goldsmith Profile**
- ★ **Kol Mikaelson in Worker Profile**
- ★ **2 more Users in Worker Profile**

★ Page Layouts: -

Page layouts control the layout and organization of buttons, fields, s-controls, Visualforce, custom links, and related lists on object record pages. They also help determine which fields are visible, read only,

and required. Use page layouts to customize the content of record pages for your users.

Created 2 Page layouts in Item object named as: -

- ❖ “Page Layout for Gold”
- ❖ “Page layout for Silver”

★ Record Type: -

Record Types are a way of grouping many records of one type for that object. These can be applied to any standard or custom object, and allow you to have a different page layout, fields, required fields, and picklist values.

Created Record Types in Item Object labeled as Gold & Silver.

★ Permission sets: -

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' function.

**We Created New Permission Sets & Labeled it as “Per to Worker”
And in Item Object we enabled Gold & Silver object permission we selected “Read, Edit & Create”. We added Assignments which we used under Worker Profile users.**

★ User Adoption: -

User adoption, or onboarding, is the process of customers or new users getting used to a product or service and then deciding to keep using it because it makes a task or goal.

In Jewelry Inventory System we created Jewel Customers under Jewel Customer tab. We created some Records under “Item, Prices, Customer orders & Billing”.

★ **Reports:** -

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

We created 3 reports:

- **Prices Report**
- **Billings with item and Customer order Report.**
- **Item with Billings Report**

★ **Dashboards:**

We created dashboards under “Item with Billings Report”, “Billings with item and Customer order Report”, “Prices Report”.

★ **Flows:**

Flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens

We selected Record Triggered flow and “Selected the Object as a “Billing” in the Drop-down list. Selected the Trigger Flow where as “A record is Created or Updated”. Selected the Optimize the flow for: “Actions and Related Records”.

(4) Detailed steps to Solution Design: -

We created objects:

- ◆ Jewel customer
- ◆ Item
- ◆ Billings
- ◆ Prices
- ◆ Customer Order

Screenshot of the Salesforce Object Manager - Items page.

The page title is "Items".

Left sidebar navigation includes: Setup, Home, Object Manager.

Section header: Fields & Relationships (24 Items, Sorted by Field Label).

Table columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, INDEXED.

Data rows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Billings with item and Customer order	Billings_with_item_and_Customer_order_c	Lookup(Items)		
Created By	CreatedBy	Lookup(User)		
Customer Name	Customer_Name_c	Lookup(Jewel Customer)		
Expected Days Of Return	Expected_Days_Of_Return_c	Picklist	Priority	
Gold Price	Gold_Price_c	Formula (Currency)		
Item	Item_c	Picklist		

Screenshot of the Salesforce Object Manager - Jewel Customer page.

The page title is "Jewel Customer".

Left sidebar navigation includes: Setup, Home, Object Manager.

Section header: Fields & Relationships (22 Items, Sorted by Field Label).

Table columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, INDEXED.

Data rows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City_c	Text(20)		
Country	Country_c	Text(18)		
Created By	CreatedBy	Lookup(User)		
Customer	Customer_c	Lookup(Jewel Customer)		
Customer Name	Customer_Name_c	Lookup(Jewel Customer)		
Customer Name	Name	Text(80)		
Data type	Data_type_c	Text(20)		

Fields & Relationships
14 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Bi Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Gold/Silver Price	Gold_Silver_Price_c	Formula (Currency)		
Item	Item_c	Lookup(Items)		✓
KDM Charge	KDM_Charge_c	Formula (Currency)		
Last Modified By	LastModifiedById	Lookup(User)		

We used to 2 Profiles: -

- *Gold Smith Profile*
- *Worker profile*

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The profile being edited is 'worker'. The 'Custom Profile' checkbox is checked. In the 'Custom App Settings' section, 'Analytics Studio (standard__Insights)' is set to 'Visible' and 'Default'. Other app settings like 'App Launcher (standard__AppLauncher)', 'Jewelry Inventory System (Jewelry_Inventory_System)', 'Platform (standard__Platform)', and 'WDC (standard__Work)' are set to 'Default'. The 'Service Provider Access' section is partially visible.

Profile Edit

worker

Name: worker

User License: Salesforce Platform

Custom Profile:

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Platform (standard__Platform)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>
Jewelry Inventory System (Jewelry_Inventory_System)	<input type="checkbox"/>	<input type="radio"/>			

Service Provider Access

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The profile being edited is 'Gold Smith'. The 'Custom Profile' checkbox is checked. In the 'Custom App Settings' section, multiple app settings like 'All Tabs (standard__AllTabSet)', 'Analytics Studio (standard__Insights)', 'App Launcher (standard__AppLauncher)', 'Approvals (standard__Approvals)', 'My Service Journey (standard__MSJApp)', 'Queue Management (standard__QueueManagement)', 'Sales (standard__LightningSales)', and 'Sales (standard__Sales)' are all set to both 'Visible' and 'Default'.

Profile Edit

Gold Smith

Name: Gold Smith

User License: Salesforce

Custom Profile:

Custom App Settings

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	My Service Journey (standard__MSJApp)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input type="checkbox"/>	<input checked="" type="radio"/>

Lighting App: -

The screenshot shows a web browser window with the URL https://ssgsdegreecollege-8e-dev-ed.develop.lightning.force.com/lightning/o/Jewel_Customer__c/list?filterName=_Recent. The page title is "Project Title CRM.docx - Microsoft Word". The main content is a "Recently Viewed" list of "Jewel Customers" with 4 items updated a minute ago. The list includes:

Customer Name
Nazma
Dharani
Mikaelson
Anitha

The browser's address bar shows "Type here to search" and the taskbar at the bottom includes icons for File Explorer, Edge, and other applications.

Roles: -

Screenshot of the Salesforce Setup Roles page for the 'Gold Smith' role.

Role Detail:

Label	Value	Role Name	Value
This role reports to	SVP_Sales & Marketing	Role Name as displayed on reports	Gold_Smith
Modified By	Kuruba Sirisha Team	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	26/02/2025, 1:35 pm	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		

Users in Gold Smith Role:

Action	Full Name	Alias	Username	Active
Edit	Niklaus Mikaelson	nmika	sirisha@123gmail.com	✓

Screenshot of the Salesforce Setup Roles page showing the 'Creating the Role Hierarchy' section.

Your Organization's Role Hierarchy:

- SGS degree college
 - CEO
 - CFO
 - COO
 - SVP_Customer Service & Support
 - Customer Support, International
 - Customer Support, North America
 - Installation & Repair Services
 - SVD_Human Resources

Users: -

- Niklaus Mikaelson
- Kol Mikaelson

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Setup' and has a 'Users' section selected. The main area is titled 'User Edit' for 'Niklaus Mikaelson'. The 'General Information' tab is active. The user's details are as follows:

Field	Value
First Name	Niklaus
Last Name	Mikaelson
Alias	nmika
Email	mugithidharani@gmail.com
Username	sirisha@123gmail.com
Nickname	User1740557462175510852
Title	
Company	
Department	
Division	
Role	Gold Smith
User License	Salesforce
Profile	Gold Smith
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>

The status bar at the bottom right shows the date as 02-03-2025 and the time as 18:35.

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Setup' and has a 'Users' section selected. The main area is titled 'User Detail' for 'Kol Mikaelson'. The user's details are as follows:

Field	Value
Name	Kol Mikaelson
Alias	kmika
Email	mugithidharani@gmail.com [Verify]
Username	sirisha@111gmail.com
Nickname	User17405582722813922863
Title	
Company	
Department	
Division	
Address	India
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Role	Worker
User License	Salesforce Platform
Profile	worker_profile
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	View

The status bar at the bottom right shows the date as 02-03-2025 and the time as 18:36.

We created 2-page layouts:

Page Layouts for Gold & Silver

The screenshot shows the Salesforce Setup interface for creating a page layout. The left sidebar is titled 'SETUP > OBJECT MANAGER' and lists various options under 'Page Layouts'. The main area is titled 'Item Layout' and contains a 'Fields' section with a 'Quick Find' search bar. A table displays fields such as 'Section', 'Blank Space', 'Amount', 'Billings with ite...', 'Created By', 'Customer Name', 'Expected Days Of ...', 'Gold Price', 'Item', 'Item Id', 'KDM', 'Last Modified By', 'Making Charges', 'Ornament', 'Owner', 'Priority', 'Prices', 'Percentage', 'Record Type', 'Purity', 'Purity Gold Price', and 'Total Weight'. Below the table are sections for 'Items Sample', 'Highlights Panel', and 'Quick Actions in the Salesforce Classic Publisher'. The bottom status bar shows the date as 02-03-2025.

This screenshot shows the same Salesforce Setup interface as the previous one, but with a sample record displayed in the 'Items Sample' section. The record includes fields like Item Id (GEN-2004-001234), Purity (17), Item (Sample Text), Prices (Sample Text), Gold Price (₹123.45), Customer Name (Sample Text), Ornament (Sample Text), Weight (0.23202), Stone Weight (0.09611), Percentage (64), Stone/Other Price (₹123.45), and Expected Days Of (Sample Text). The bottom status bar shows the date as 02-03-2025.

We created 3 Reports:

◆ **Prices Report**

- ◆ **Item with Billings Report**
- ◆ **Billing with Items & Customer order**

REPORT ▾

Price report ▾ Prices

Fields ▾

Groups

GROUP ROWS

Add group... ▾

Columns ▾

Add column... ▾

Price: Customer Price ▾

Price: Owner Name ▾

Gold Price ▾

Silver Price ▾

Previewing a limited number of records. Run the report to see everything.

	Price: Customer Price	Price: Owner Name	Gold Price	Silver Price
1	Price-01	Kuruba Sirisha Team	₹80,000.00000	₹70,000.00000
2	Price-02	Kuruba Sirisha Team	₹80,000.00000	₹70,000.00000
3			₹1,60,000.00000	₹1,40,000.00000

Update Preview Automatically

Report: Billings with Item

Billings with Item Report

Total Records	Total Amount	Total Total Amount	Total KDM Charge	Total Making Charges	Total Stones/Other Price	Total Stone Weight
3	₹7,25,600.00	₹9,12,160	₹1,12,560	₹34,000.00	₹40,000.00	40.00

Item: Item Type	Billing: Billing Name	Item: Item Id	Amount	Ornament	Total Amount	KDM Charge	Making Charges	Stones/Other Price	Stone Weight
Gold (2)	Billing-01	Item-01	₹3,20,000.00	Necklace	₹3,77,000	₹32,000	₹15,000.00	₹10,000.00	10.00
	Billing-02	Item-02	₹4,00,000.00	Necklace	₹5,18,000	₹80,000	₹18,000.00	₹20,000.00	10.00
Subtotal			₹7,20,000.00		₹8,95,000	₹11,20,000	₹33,000.00	₹30,000.00	20.00
Silver (1)	Billing-05	Item-03	₹5,600.00	Necklace	₹17,160	₹560	₹1,000.00	₹10,000.00	20.00
			₹5,600.00		₹17,160	₹560	₹1,000.00	₹10,000.00	20.00
Total (3)			₹7,25,600.00		₹9,12,160	₹1,12,560	₹34,000.00	₹40,000.00	40.00

Row Counts Detail Rows Subtotals Grand Total

26°C Haze

The screenshot shows a Salesforce report interface. At the top, there are tabs for 'Jewelry Inventory S...', 'Jewel Customers', 'Items', 'Orders', 'Prices', 'Billings', 'Reports' (which is selected), and 'Dashboards'. Below the tabs, the report title is 'Report: Billings with Item Billings with item and Customer order'. It displays a table with 4 rows, each containing a Billing ID and a Customer Name. The columns are 'Customer Billing: Customer Billing' and 'Item: Customer Name'. The data is as follows:

	Customer Billing: Customer Billing	Item: Customer Name
1	Billing-01	Anitha
2	Billing-02	Mikaelson
3	Billing-03	Dharani
4	Billing-04	Nazma

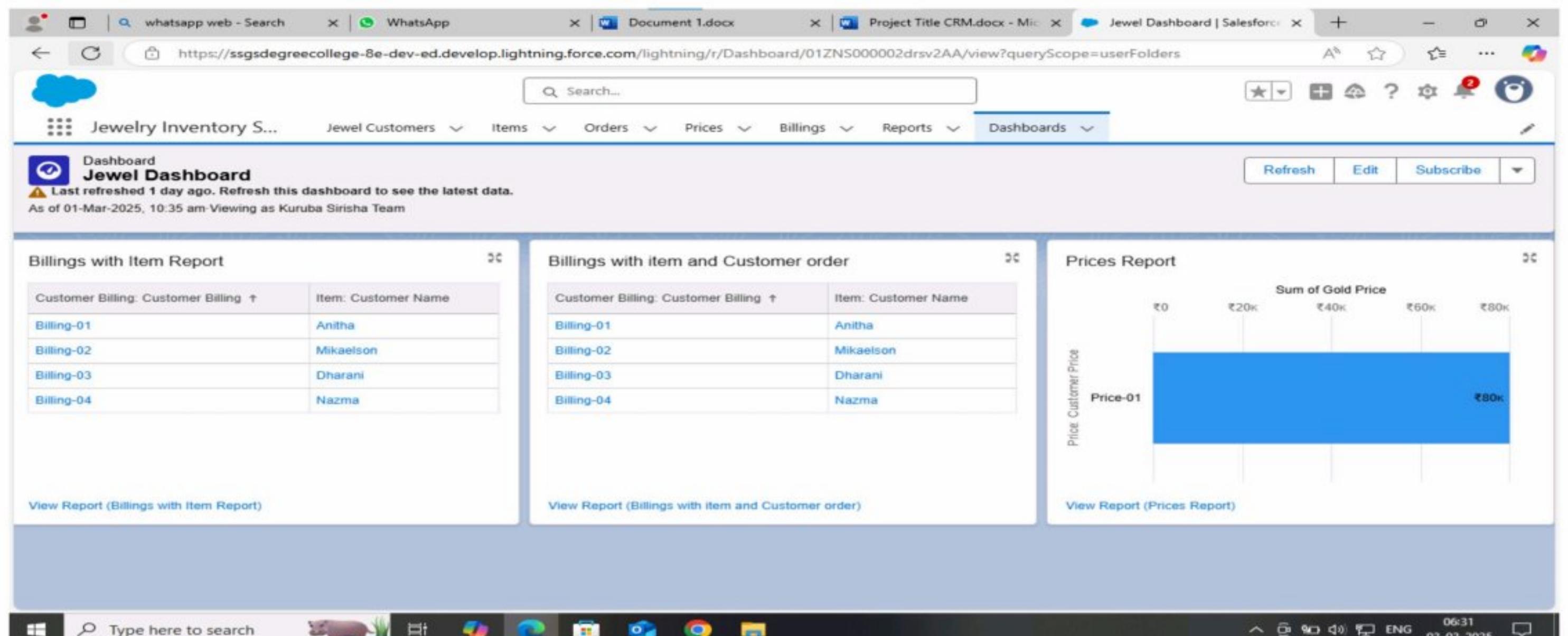
At the bottom of the report area, there is a toolbar with icons for 'Enable Field Editing', 'Search', 'Add Chart', and 'Edit'. The status bar at the bottom right shows '06:25' and '03-03-2025'.

Dashboard: -

The screenshot shows a Salesforce dashboard interface. At the top, there are tabs for 'Jewelry Inventory S...', 'Jewel Customers', 'Items', 'Orders', 'Prices', 'Billings', 'Reports', and 'Dashboards' (which is selected). Below the tabs, the dashboard title is 'Recent'. It shows 2 items in the 'Recent' section. The left sidebar has sections for 'Dashboards', 'Recent', 'Created by Me', 'Private Dashboards', 'All Dashboards', 'Folders', 'All Folders', 'Created by Me', 'Shared with Me', 'Favorites', and 'All Favorites'. The right side shows a table with columns: Dashboard Name, Description, Folder, Created By, and Created On. The data is as follows:

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On
Recent	Jewel Dashboard	Private Dashboards	Kuruba Sirisha Team	1/3/2025, 10:32 am	
Created by Me	Billings with item and Customer order	Private Dashboards	Kuruba Sirisha Team	1/3/2025, 6:58 am	

At the bottom of the dashboard area, there is a toolbar with icons for 'Search', 'New Dashboard', 'New Folder', and 'More'. The status bar at the bottom right shows '06:30' and '03-03-2025'.



Validation Rules: -

Created Validation Rules under Jewel Customer & Item

Rule Name	Error Location	Error Message	Active	Modified By
Jewel_Customer_object	Top of Page	Please fill Required fields	✓	Kuruba Sirisha Team, 26/02/2025, 10:38 am
Postal_Code	Zip/Postal code	Must contain 6 digits	✓	Kuruba Sirisha Team, 26/02/2025, 10:27 am

Screenshot of the Salesforce Setup interface showing the Validation Rules section for the 'Items' object.

The left sidebar shows navigation links: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts.

The main content area displays the 'Validation Rules' table:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Item	Top of Page	Please fill Required fields	✓	Kuruba Sirisha Team, 26/02/2025, 7:43 pm

A 'New' button is located in the top right corner of the table header.

Screenshot of the Salesforce Setup interface showing the details of the 'Item' Validation Rule.

The left sidebar shows navigation links: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts.

The main content area displays the 'Items Validation Rule' detail page:

Validation Rule Detail

Rule Name	Item	Active	✓
Error Condition Formula	OR(ISBLANK(Amount__c), ISBLANK(Customer_Name__c), ISBLANK(Gold_Price__c), ISBLANK(KDM__c), ISBLANK(Ornament__c), ISBLANK(Percentage__c), ISBLANK(Making_Charges__c), ISBLANK(Prices__c), ISBLANK(Stone_Weight__c), ISBLANK(Silver_Price__c), ISBLANK(Stone_Other_Price__c), ISBLANK(Stone_Weight__c))	Error Location	Top of Page
Error Message	Please fill Required fields	Created By	Kuruba Sirisha Team, 26/02/2025, 10:52 am
Description		Modified By	Kuruba Sirisha Team, 26/02/2025, 7:43 pm

Buttons for 'Edit' and 'Clone' are located at the bottom of the detail page.

Screenshot of the Salesforce Object Manager setup page for the 'Jewel Customer' object.

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

Jewel Customer Validation Rule

Validation Rule Detail:

- Rule Name: Jewel_Customer_object
- Error Condition Formula: OR(ISBLANK(City__c), ISBLANK(Country__c), ISBLANK(Phone__c), ISBLANK(State__c), ISBLANK(Street__c))
- Error Message: Please fill Required fields
- Description:
- Created By: Kuruba Sirisha Team, 26/02/2025, 10:38 am
- Modified By: Kuruba Sirisha Team, 26/02/2025, 10:38 am



Schema Builder: -

We created Schema Builders for Jewel Customer, Price, Item, Customer order & Billing.

Screenshot of the Schema Builder interface showing relationships between objects.

Elements:

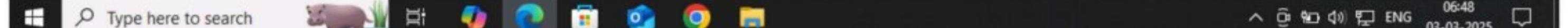
- Account
- Activity
- Address
- Alternative Payment Method
- Appointment Category
- Appointment invitation
- Appointment invitee
- Appointment Topic Time Slot
- Approval Submission
- Approval Submission Detail
- Approval Work Item
- Asset

Objects:

- Billing
- Price
- Customer Order
- Jewel Customer
- Items
- Recommendation

Relationship Legend:

- Lookup Relationship
- Master-Detail Relationship
- Required Field



Field Dependencies: -

We created Field Dependencies under Item objects

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'SETUP' and contains a 'Fields & Relationships' section with various options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Items Field Dependencies' and shows a table with one row: Action (Edit | Del), Controlling Field (Priority), Dependent Field (Expected Days Of Return), and Modified By (Kuruba Sirisha Team, 26/02/2025, 10:02 am). A 'New' button is also visible.

The screenshot shows the 'Edit Field Dependency' page. The left sidebar includes sections for Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Sales Cloud Everywhere. The main content area is titled 'Edit Field Dependency' and shows a table with columns for Controlling Field (Priority) and Dependent Field (Expected Days Of Return). Below the table, there's an 'Instructions' section with a legend for 'Excluded Value' (yellow) and 'Included Value' (green). Two tables are displayed: one for Priority (Low, Medium, High, Critical) and another for Expected Days Of Return (1-3 Days, 4-5 Days, 6-7 Days, 8-10 Days, 1-3 Days, 4-5 Days, 6-7 Days, 8-10 Days).

Tabs:-

We created **Tabs** for **Jewel Customer, Prices, Items, Billing & Customer Order.**

The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page selected. The page displays a table of custom object tabs, each with an 'Edit | Del' button and a 'Label' column. The 'Tab Style' column shows icons for 'Computer', 'Whistle', 'Heart', 'Star', and 'Train'. The 'Description' column is empty. Below the table are sections for 'Web Tabs' and 'Visualforce Tabs', both of which currently have no entries defined.

Flows:-

We created flows

The screenshot shows the Salesforce Flow Record list page. It displays a single record titled 'Email Notification Flow' which is a 'Record-Triggered After Save Flow' and is currently 'Activated'. The record was last modified on 01/03/2025 at 11:32 am by KTeam. The page includes a search bar and various filter and sorting options.

The screenshot shows the 'Email Notification Flow' details page in the Salesforce Lightning interface. The flow is named 'Email Notification Flow' and is of type 'Record—Run After Save'. It was activated on 01/03/2025 at 11:32 am by the 'Kuruba Sirisha Team'. The flow has been modified on the same date at 11:32 am. The 'Details' tab is selected, showing fields like Flow Label, API Name (Email_Notification_Flow), and Flow Type (Record-Triggered After Save Flow). The 'Information' section contains detailed information about the flow's creation and modification.

(5) Testing & Validation:

User Interface Testing:

❖ Record Types:-

We Created Record types in item object and labeled as “Gold” and “Silver”.

The screenshot shows the 'Object Manager' for the 'Items' object in the Salesforce setup. The 'Record Types' section is displayed, listing two record types: 'Gold' and 'Silver'. Both record types are active and were last modified by the 'Kuruba Sirisha Team' on 26/02/2025 at 2:06 pm and 2:09 pm respectively. The 'Record Types' section is highlighted in the sidebar.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	Kuruba Sirisha Team, 26/02/2025, 2:06 pm
Silver*	Silver items information	✓	Kuruba Sirisha Team, 26/02/2025, 2:09 pm

The screenshot shows the Salesforce Object Manager interface. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The 'Record Types' option is selected. In the main content area, it shows the 'Gold' record type for the 'Items' object. The record type details include:

Record Type Label	Gold
Record Type Name	Gold
Namespace Prefix	
Description	Gold items information
Created By	Kuruba Sirisha Team, 28/02/2025, 2:06 pm
Modified By	Kuruba Sirisha Team, 28/02/2025, 2:06 pm

Below this, a section titled 'Picklists Available for Editing' lists three fields:

Action	Field	Modified Date
Edit	Expected Days Of Return	28/02/2025, 2:06 pm
Edit	Item	28/02/2025, 2:06 pm
Edit	Priority	28/02/2025, 2:06 pm

The screenshot shows the Salesforce Object Manager interface, similar to the previous one but for the 'Silver' record type. The sidebar and record type details are identical to the 'Gold' type. The 'Picklists Available for Editing' section also lists the same three fields.

Action	Field	Modified Date
Edit	Expected Days Of Return	28/02/2025, 2:09 pm
Edit	Item	28/02/2025, 2:09 pm
Edit	Priority	28/02/2025, 2:09 pm

★ Permission Sets: -

We created permission sets and labeled as “Per to Worker “and selected object permissions for “Read, Edit, Create”.

The screenshot shows the Salesforce Setup interface for managing Permission Sets. The left sidebar under 'Users' has 'Permission Set Groups' and 'Permission Sets' selected. The main content area displays the 'Per to Worker' permission set, which was created by the 'Kuruba Sirisha Team' on 26/02/2025 at 5:56 pm and last modified by them on 26/02/2025 at 10:17 am. The 'API Name' is 'Per_to_Worker' and the 'Namespace Prefix' is 'Per'. The 'Permission Set Overview' section includes fields for 'Session Activation Required' (unchecked) and 'Permission Set Groups Added To' (0). The 'Apps' section lists various app-related permissions: Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, and Visualforce Page Access. Below this, the 'Object Settings' tab is selected in the 'Items' section, showing 'Tab Settings' with 'Available' and 'Visible' checkboxes both checked. The 'Items: Record Type Assignments' table shows 'Gold' and 'Silver' record types assigned to the 'Visible' tab. The 'Object Permissions' table lists 'Read', 'Create', 'Edit', and 'Delete' permissions, all of which are checked as 'Enabled'.

★ Profiles: -

- We created 2 Profiles and given name as
- Gold Smith Profile

● Worker Profile

Profile Edit

Name: Gold Smith
User License: Salesforce
Description: [Empty]

Custom App Settings

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	My Service Journey (standard__MSJApp)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Automation (standard__FlowsApp)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Business Rules Engine (standard__ExpressionSetupConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>

Profile Edit

Name: Gold Smith
User License: Salesforce
Description: [Empty]

Basic Access

	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Billing	<input checked="" type="checkbox"/>						
Billing with Item and Customer orders	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Billings	<input checked="" type="checkbox"/>						
Orders	<input checked="" type="checkbox"/>						

Data Administration

	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Items	<input checked="" type="checkbox"/>						
Jewel Customers	<input checked="" type="checkbox"/>						
Prices	<input checked="" type="checkbox"/>						
Pricebooks	<input checked="" type="checkbox"/>						

Session Settings

Session Times Out After: 2 hours of inactivity
Session Security Level Required at Login: None

Password Policies

- User passwords expire in: 90 days
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Maximum invalid login attempts: 10
- Lockout effective period: 15 minutes
- Obfuscate secret answer for password resets
- Require a minimum 1 day password lifetime
- Don't immediately expire links in forgot password emails

The screenshot shows the Salesforce Setup interface with the URL <https://ssgsdegreecollege-8e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eNS000005aidx%2Fe%3FretU...>. The left sidebar is expanded, showing categories like Hyperforce Assistant, Users, Data, Feature Settings, Data.com, Decision Explainer, Marketing, Sales, and Products. The 'Profiles' section under 'Users' is selected. The main content area is titled 'Profiles' and shows 'worker profile'. It includes a 'Profile Edit' section with fields for Name (worker profile), User License (Salesforce Platform), and Description. Below this are sections for 'Custom App Settings' and 'Service Provider Access', both of which have tabs for 'Visible' and 'Default' settings.

This screenshot shows the same Salesforce Setup interface as the previous one, but the main content area is now focused on the 'Custom Object Permissions' section of the 'Profiles' page. It lists various objects like Billing, Billing with Item and Customer orders, Billing, and Orders, each with detailed permission settings for basic access and data administration. Below this are sections for 'Session Settings' (Session Times Out After: 2 hours of inactivity) and 'Password Policies' (User password expire in: 90 days, Password complexity requirement: Must include alpha and numeric characters). The left sidebar remains the same, showing the expanded 'Users' category with the 'Profiles' section selected.

★ Validation Rules: -

Screenshot of the Salesforce Setup interface showing the Validation Rules page for the 'Items' object.

The left sidebar shows the following navigation path: SETUP > OBJECT MANAGER > Items.

The main content area displays a table titled "Validation Rules" with one item listed:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Item	Top of Page	Please fill Required fields	✓	Kuruba Sirisha Team, 26/02/2025, 7:43 pm

The sidebar also lists other setup categories: 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.

Screenshot of the Salesforce Setup interface showing the details of the "Items Validation Rule" (Rule Name: Item).

The left sidebar shows the following navigation path: SETUP > OBJECT MANAGER > Items.

The main content area displays the "Validation Rule Detail" for the rule named "Item".

Rule Name	Item	Active	
Error Condition Formula	OR(ISBLANK(Amount__c) , ISBLANK(Customer_Name__c) , ISBLANK(Gold_Price__c) , ISBLANK(KDM__c) , ISBLANK(Ornament__c) , ISBLANK(Percentage__c) , ISBLANK(Making_Charges__c) , ISBLANK(Prices__c) , ISBLANK(Stone_Weight__c) , ISBLANK(Silver_Price__c) , ISBLANK(Stone_Other_Price__c) , ISBLANK(Stone_Weight__c) , ISBLANK(Weight__c))	✓	
Error Message	Please fill Required fields	Error Location	Top of Page
Description			
Created By	Kuruba Sirisha Team, 26/02/2025, 10:52 am	Modified By	Kuruba Sirisha Team, 26/02/2025, 7:43 pm

The sidebar also lists other setup categories: 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.

Items Validation Rule

Validation Rule Edit

Rule Name: Item

Active:

Description:

Error Condition Formula:

```
OR( ISBLANK(Amount_c), ISBLANK(Customer_Name_c), ISBLANK(Gold_Price_c), ISBLANK(KDM_c), ISBLANK(Ornaments_c), ISBLANK(Percentage_c), ISBLANK(Making_Charges_c), ISBLANK(Prices_c), ISBLANK(Stone_Weight_c), ISBLANK(Silver_Price_c), ISBLANK(Stone_Other_Price_c), ISBLANK(Stone_Weight_c), ISBLANK(Weight_c) )
```

Functions:

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Quick Tips: Operators & Functions

★ Flows: -

Flow Builder

Email Notification Flow - V1

Last saved on 1/3/2025, 11:32 am Active

Start Record-Triggered Flow

Object: Billing

Trigger: A record is created

Optimize for: Actions and Related Records

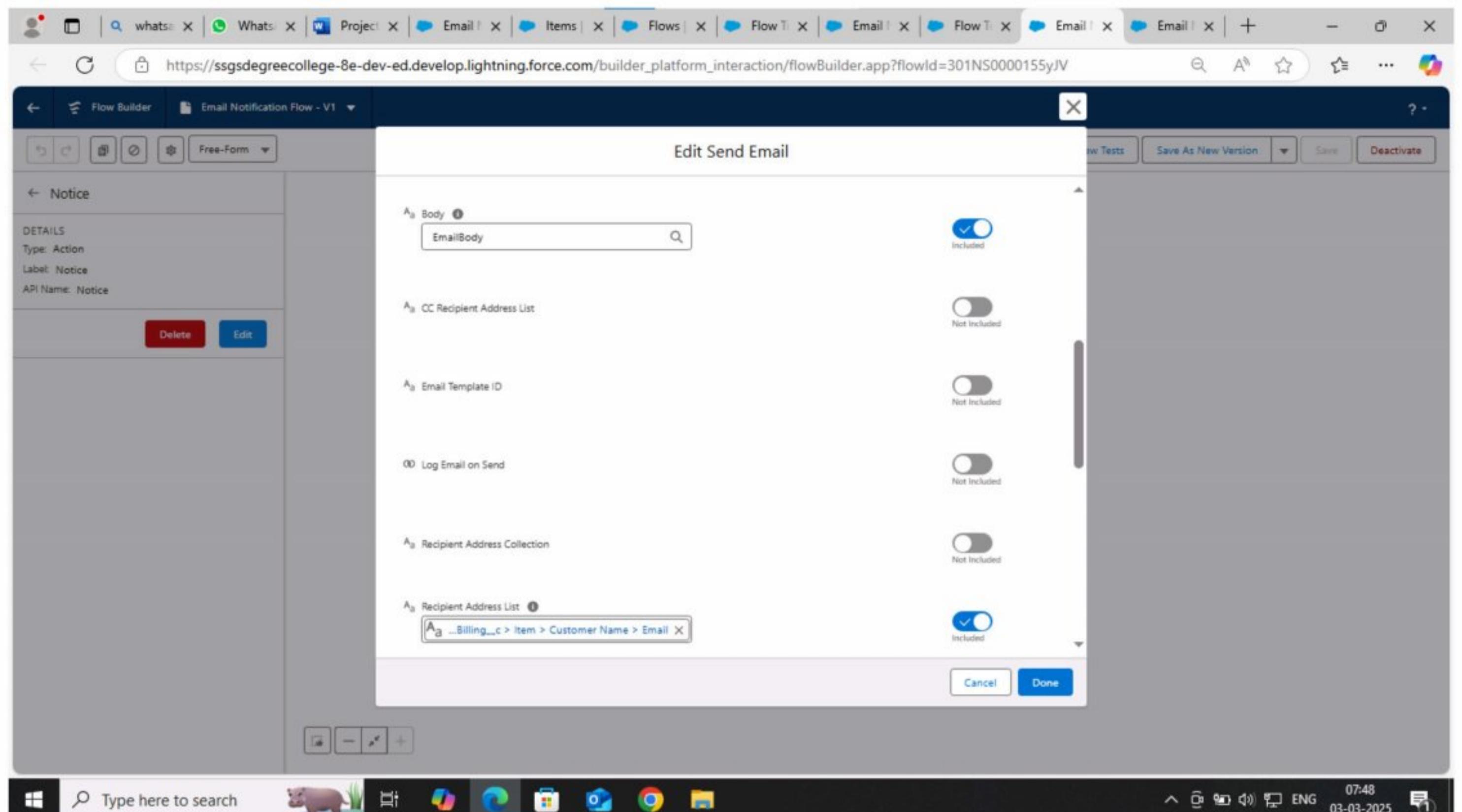
Add Scheduled Paths (Optional)

Open Flow Trigger Explorer for Billing

Action Notice

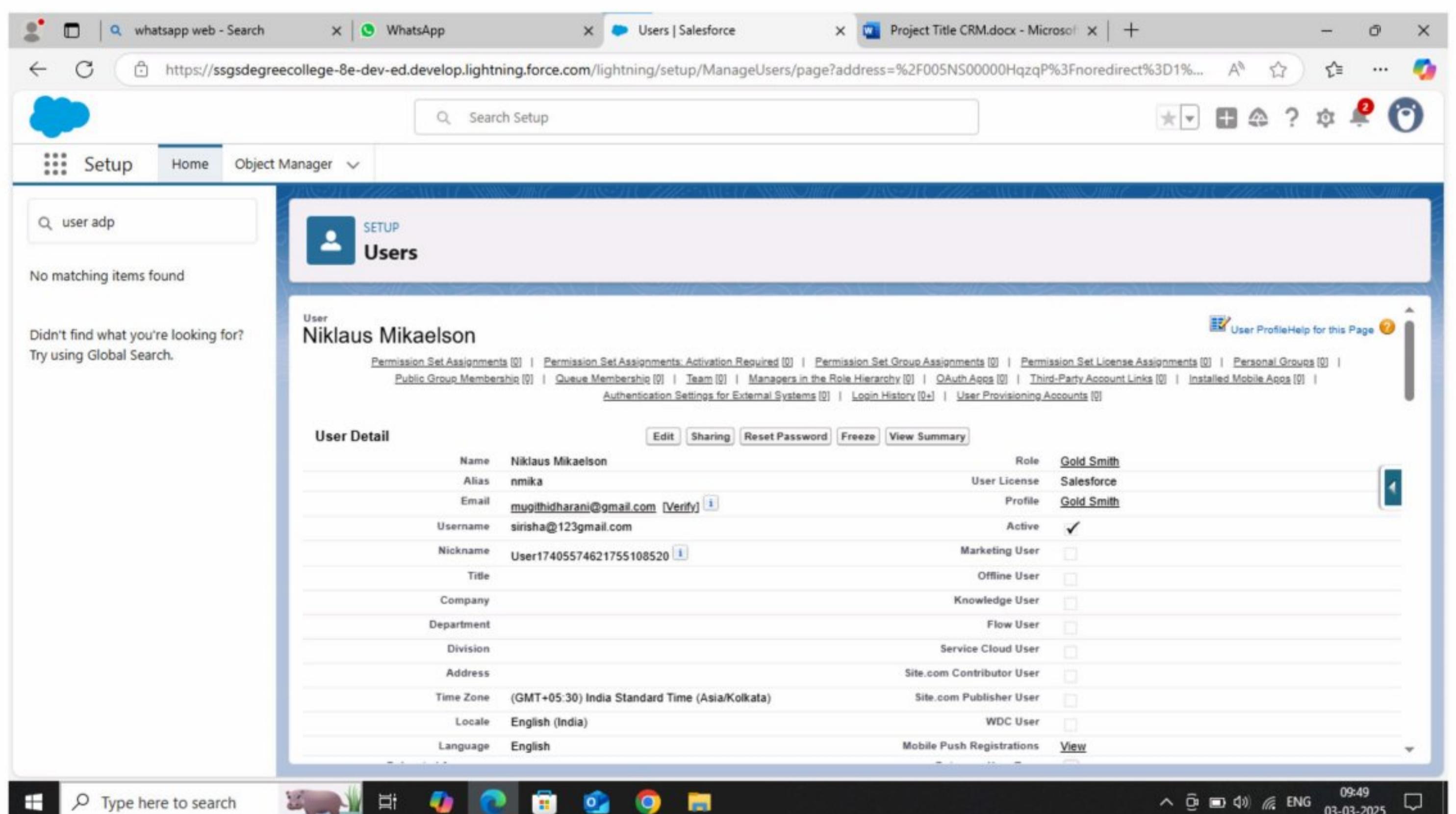
Run Immediately

Get more on the AppExchange



★ User Adoption: -

We created some jewel customers, items, billings, prices, customer orders in Jewelry Inventory System.



whatsapp web - Search | WhatsApp | Users | Salesforce | Project Title CRM.docx - Microsoft Word

https://ssgsdegreecollege-8e-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005NS00000Ha66j%3Fnoredirect%3D1%2...

Cloud Search Setup Home Object Manager

No matching items found

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

User Kuruba Sirisha Team

Permission Set Assignments [1] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] | Team [0] | Managers in the Role Hierarchy [0] | OAuth Apps [1] | Third-Party Account Links [0] | Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [10+] | User Provisioning Accounts [0]

User Detail

Name	Kuruba Sirisha Team	Role	
Alias	KTeam	User License	Salesforce
Email	mugithidharani@gmail.com [Verified]	Profile	System Administrator
Username	jewel@kurubasirishateam.com	Active	<input checked="" type="checkbox"/>
Nickname	jewel <small>i</small>	Marketing User	<input checked="" type="checkbox"/>
Title		Offline User	<input checked="" type="checkbox"/>
Company	SSGS degree college	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input checked="" type="checkbox"/>
Address	Koya nagar,near kasapuram road Guntakal 515801 AP INDIA	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>

User ProfileHelp for this Page

Type here to search

Windows Start Menu

09:50 03-03-2025 ENG

The screenshot shows the Salesforce Experience Profile Manager Permission Sets page. The URL in the browser is <https://ssgsdegreecollege-8e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPNSNS000006WefW>. The page title is "Permission Sets". The main content area displays the "Experience Profile Manager" permission set, which was created by "Kuruba Sirisha Team" on 20/02/2025, 10:28 am, and last modified by "Kuruba Sirisha Team" on 28/02/2025, 10:17 am. The permission set has an API name of "Experience_Profile_Manager" and a namespace prefix of "Experience". The "Description" field is empty. The "License" is listed as "Salesforce". The "Session Activation Required" field is checked. The "Permission Set Groups Added To" field shows 0 groups. Below this, the "Apps" section lists various permissions: Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, and Visualforce Page Access. The Windows taskbar at the bottom shows the search bar, Start button, and pinned icons for WhatsApp, Microsoft Edge, and File Explorer.

(6) Conclusion: -

CRM is a tool that allows businesses to manage relationships with their customers effectively. Customer Relationship management is a business strategy that enables a business organization to maximize revenue, customer satisfaction, and profitability through strategic mobilization, organization, and management of customer's interests and desires. BWM has traversed

numerous business challenges that made it establish a CRM that will foster customer relationship as a baseline for market strengthening and diversification. BMW has diversified its market in various global markets through the initiation of the CRM systems. The system has significantly contributed to the company's financial, operational, managerial and development initiatives with a robust customer relationship that has fostered great sales of its product. Mercedes Benz operates a similar customer relationship management system just BMW and due to market power, the company has its customerroots to various market bases. Mercedes has majored in customer-dealership business relationships. This has provided the company with strategic mechanization of customer retention, satisfaction and purchase behavior enhancing the company's profitability through an increased purchase command. The two companies are among the leading CRM implementers in automotive.



CRM system is critical for jewelry businesses, allowing them to effectively manage customer relationships by centralizing data, enabling personalized interactions, optimizing sales processes, and gaining valuable insights into customer behavior, ultimately leading to increased sales, improved customer loyalty, and a more streamlined business operation through tailored marketing strategies and exceptional customer service.

A CRM (Customer Relationship Management) system for jewelers is essential for managing customer relationships, enhancing sales, and improving overall business efficiency.



Jewelry businesses face a multitude of challenges, from fierce competition to changing consumer preferences and limited budgets for marketing and advertising. It can be a tough market to navigate, but the good news is that implementing a customer relationship management (CRM) system can help overcome many of these challenges.

One of the biggest challenges facing jewelry businesses is the need to stay relevant and top of mind with customers. With so many options available, consumers are easily distracted and can quickly forget about your brand. A CRM system can help you stay top of mind by enabling you to communicate with

customers on a regular basis and provide personalized recommendations based on their preferences.

Another challenge is managing inventory and ensuring that you have the right products available at the right time. A CRM system can help you keep track of inventory levels and alert you when products are running low or need to be restocked. This can help you avoid lost sales due to out-of-stock items and ensure that you always have a variety of products available to meet customer demand.

Finally, jewelry businesses face the challenge of attracting new customers and retaining existing ones. A CRM system can help you identify customer segments and target them with personalized marketing messages that resonate with their specific interests and preferences.

