

# CRM Application for Jewel Management

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## 1.INTRODUCTION

## 1.1 Project Overview

The Jewel Inventory System is a software solution built to manage the inventory and sales processes of a jewellery store or manufacturer. The system aims to provide an efficient, user-friendly way to track and control inventory of different jewellery items, keep accurate records, and enable smooth sales transactions.

## 1.2 Purpose

The purpose of this CRM project is to develop a centralized and intelligent Customer Relationship Management system tailored to the specific needs of a jewelry business. The CRM will serve as a unified platform to manage and track all aspects of customer interaction, sales, and after-sales service with a focus on high-value items and luxury experiences.

## DEVELOPMENT PHASE

Creating Developer Account:

By using this URL - <https://developer.salesforce.com/signup>

- Create objects: Jewel Customer , Item, **Customer Order, Price, Billing.**

## For Jewel Customer :

The screenshot shows the Salesforce Setup interface for the 'Jewel Customer' object. The left sidebar contains a 'Details' menu with options like 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, and Triggers. The main content area is titled 'Details' and includes fields for Description, API Name (Jewel\_Customer\_c), Custom (checked), Singular Label (Jewel Customer), Plural Label (Jewel Customers), Enable Reports (checked), Track Activities (checked), Track Field History, Deployment Status (Deployed), Help Settings, and a link to Standard salesforce.com Help Window. Edit and Delete buttons are in the top right corner.

Field	Value
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

## For Item :

The screenshot shows the Salesforce Setup interface for the 'Item' object. The left sidebar contains a 'Details' menu with options like 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, and Triggers. The main content area is titled 'Details' and includes fields for Description, API Name (Item\_c), Custom (checked), Singular Label (Item), Plural Label (Items), Enable Reports (checked), Track Activities (checked), Track Field History, Deployment Status (Deployed), Help Settings, and a link to Standard salesforce.com Help Window. Edit and Delete buttons are in the top right corner.

Field	Value
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

## For Customer Order :

The screenshot shows the Salesforce Setup interface for the 'Customer Order' object. The browser address bar displays 'orgfarm-3901858647-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gl000001nVh/Details/view'. The page header includes the Salesforce logo, a search bar, and navigation links for Setup, Home, and Object Manager. The left sidebar lists various setup categories, with 'Details' selected. The main content area is titled 'Customer Order' and contains a 'Details' section with the following fields:

Field	Value
Description	
API Name	Customer_Order__c
Custom	✓
Singular Label	Customer Order
Plural Label	Customer Orders
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

## For Price :

The screenshot shows the Salesforce Setup interface for the 'Price' object. The browser address bar displays 'orgfarm-3901858647-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gl000001nVt/Details/view'. The page header includes the Salesforce logo, a search bar, and navigation links for Setup, Home, and Object Manager. The left sidebar lists various setup categories, with 'Details' selected. The main content area is titled 'Price' and contains a 'Details' section with the following fields:

Field	Value
Description	
API Name	Price__c
Custom	✓
Singular Label	Price
Plural Label	Prices
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

For Billing :

The screenshot shows the Salesforce Setup interface for the 'Billing' object. The left sidebar contains a list of 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, Restriction Rules, Scoping Rules, Object Access, and Triggers. The 'Details' section is selected, showing the following information:

Field	Value
Description	
API Name	Billing_c
Custom	✓
Singular Label	Billing
Plural Label	Billings
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

- **Creating a Custom Tab for Jewel customer, Items, Customer order, Price, Billing.**

For Jewel Customer :

The screenshot shows the Salesforce Setup interface for the 'Jewel Customers' custom tab. The left sidebar contains a list of configuration options: User Interface, Rename Tabs and Labels, and Tabs. The 'Tabs' section is selected, showing the following information:

Field	Value
Tab Label	Jewel Customers
Object	Jewel Customer
Description	
Created By	Gokula Mithran, 8/27/2025, 9:32 PM
Modified By	Gokula Mithran, 8/27/2025, 9:32 PM
Tab Style	Diamond
Splash Page Custom Link	

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

## For Items :

The screenshot shows the Salesforce Setup interface for a Custom Object Tab named 'Items'. The left sidebar contains the 'Setup' menu with 'Home' and 'Object Manager' options. The 'Tabs' section is selected under 'User Interface'. The main content area displays the 'Custom Object Tab' details for 'Items'. The 'Tab Label' is 'Items', the 'Object' is 'Item', and the 'Tab Style' is 'Box'. The 'Created By' and 'Modified By' fields both show 'Gokela Mithran' on 8/27/2025 at 9:33 PM. There are 'Edit' and 'Delete' buttons next to the 'Tab Label'.

Search Setup

Setup Home Object Manager

Q tabs

User Interface

Rename Tabs and Labels

Tabs

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

Custom Object Tab

Items

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Tab Label Items Edit Delete

Object Item

Description

Created By Gokela Mithran 8/27/2025, 9:33 PM

Tab Style Box

Splash Page Custom Link

Modified By Gokela Mithran 8/27/2025, 9:33 PM

## For Customer order :

The screenshot shows the Salesforce Setup interface for a Custom Object Tab named 'Customer Orders'. The left sidebar contains the 'Setup' menu with 'Home' and 'Object Manager' options. The 'Tabs' section is selected under 'User Interface'. The main content area displays the 'Custom Object Tab' details for 'Customer Orders'. The 'Tab Label' is 'Customer Orders', the 'Object' is 'Customer Order', and the 'Tab Style' is 'Credit card'. The 'Created By' and 'Modified By' fields both show 'Gokela Mithran' on 8/27/2025 at 9:33 PM. There are 'Edit' and 'Delete' buttons next to the 'Tab Label'.

Search Setup

Setup Home Object Manager

Q tab

Feature Settings

Analytics

Tableau

Tableau Embedding

Tableau UAF Claims Definition

User Interface

Console Settings

Loaded Console Tab Limit

Rename Tabs and Labels

Tabs

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

Custom Object Tab

Customer Orders

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Tab Label Customer Orders Edit Delete

Object Customer Order

Description

Created By Gokela Mithran 8/27/2025, 9:33 PM

Tab Style Credit card

Splash Page Custom Link

Modified By Gokela Mithran 8/27/2025, 9:33 PM

## For Price :

The screenshot shows the 'Prices' custom object tab configuration page. The left sidebar contains a search bar with 'tab' and a list of settings categories: Feature Settings, Analytics, Tableau, and User Interface. The 'Tableau' category is expanded, showing 'Tableau Embedding', 'Tableau UAF Claims Definition', and 'User Interface'. The 'User Interface' category is further expanded, showing 'Console Settings', 'Loaded Console Tab Limit', and 'Rename Tabs and Labels'. The 'Tabs' sub-section is selected. The main content area is titled 'Custom Object Tab Prices' and includes a 'Help for this Page' link. Below the title, it states 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' section shows a table with the following data:

Tab Label	Prices	Tab Style	Hands
Object	Price		
Description		Splash Page Custom Link	
Created By	Gokela Mithran, 8/27/2025, 9:34 PM	Modified By	Gokela Mithran, 8/27/2025, 9:34 PM

Buttons for 'Edit' and 'Delete' are visible next to the 'Custom Tab Definition Detail' title.

## For Billings :

The screenshot shows the 'Billings' custom object tab configuration page. The left sidebar is identical to the previous screenshot, with the 'Tabs' sub-section selected. The main content area is titled 'Custom Object Tab Billings' and includes a 'Help for this Page' link. Below the title, it states 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' section shows a table with the following data:

Tab Label	Billings	Tab Style	Building
Object	Billing		
Description		Splash Page Custom Link	
Created By	Gokela Mithran, 8/27/2025, 9:35 PM	Modified By	Gokela Mithran, 8/27/2025, 9:35 PM

Buttons for 'Edit' and 'Delete' are visible next to the 'Custom Tab Definition Detail' title.

## Creating the Lightning App :

### App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.


#### App Details

\* App Name ⓘ

\* Developer Name ⓘ

Description ⓘ

#### App Branding

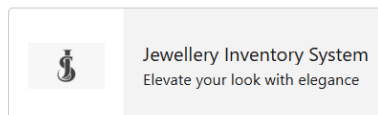
Image ⓘ  


Primary Color Hex Value ⓘ

[Clear](#)

Org Theme Options  
☐ Use the app's image and color instead of the org's custom theme

#### App Launcher Preview



### App Options

#### Navigation and Form Factor ⓘ

- \* **Navigation Style**
- ☐ Standard navigation
  - ☒ Console navigation
- \* **Supported Form Factors**
- ☒ Desktop and phone
  - ☐ Desktop
  - ☐ Phone

#### Setup and Personalization ⓘ

- Setup Experience**
- ☒ Setup (full set of Setup options)
  - ☐ Service Setup
  - ☐ Data Cloud Setup
- App Personalization Settings**
- ☐ Disable end user personalization of nav items in this app
  - ☐ Clear workspace tabs for each new console session
  - ☐ Use Omni-Channel sidebar



## Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

🔄 Create ▼

Type to filter list...

Accounts

Activation Targets

Activations

All Sites

Alternative Payment Methods

Analytics

App Launcher

Appointment Categories

Appointment Invitations

Approval Requests

Approval Submission Details

Approval Submissions

Approval Work Items

Selected Items

Jewel Customers

Items

Customer Orders

Prices

Billings

Reports

Dashboards

▶

◀

▲

▼

## Navigation Rules

Navigation rules determine whether to open a related record in addition to the primary record.

Items

Customer Orders

Billings

\* Items open as

☒ Workspace tabs

☐ Subtabs of

Customer Name (Jewel\_Customer\_\_c)

## User Profiles

Choose the user profiles that can access this app.

### Available Profiles

Analytics Cloud Integration User
Analytics Cloud Security User
Anypoint Integration
Authenticated Website
Authenticated Website
B2B Reordering Portal Buyer Profile
Contract Manager
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer Community Login User
Customer Community Plus Login User
Customer Community Plus User

### Selected Profiles

System Administrator

Gold Smith

## Creating Lookup Relationship :

Create a relationship between Jewel Customer & Customer Order Object:

Setup

Home

Object Manager

Search Setup

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

Scoping Rules

Object Access

Triggers

Customer Order Custom Field

Customer

Back to Customer Order

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Customer	Object Name	Customer Order
Field Name	Customer	Data Type	Lookup
API Name	Customer__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Gokula Mithran, 8/27/2025, 9:43 PM	Modified By	Gokula Mithran, 8/27/2025, 9:43 PM

Lookup Options

Related To	Jewel Customer	Child Relationship Name	Customer Orders
Related List Label	Customer Orders		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

Lookup Filter

No lookup filters defined.

Validation Rules

New

No validation rules defined.

## Creating a Master-Detail Relationship :

- Creating Master-Detail Relationship between Item & Customer Order Object.

The screenshot shows the Salesforce Setup interface for the 'Customer Order' object. The left sidebar contains a navigation menu with options like 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, and Triggers. The main content area is titled 'Customer Order Custom Field Item' and includes a 'Back to Customer Order' link. Below this, there are tabs for 'Custom Field Definition Detail', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Custom Field Definition Detail' tab is active, showing a table of field information. The table has columns for Field Label, Field Name, API Name, Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By, and Modified By. The field information is as follows:

Field Label	Field Name	API Name	Description	Help Text	Data Owner	Field Usage	Data Sensitivity Level	Compliance Categorization	Created By	Modified By
Item	Item	Item__c							Gokela Mithran	8/27/2025, 9:46 PM

Below the table, there are sections for 'Master-Detail Options' and 'Lookup Filter'. The 'Master-Detail Options' section shows 'Related To' as 'Item', 'Child Relationship Name' as 'Customer Orders', and 'Read/Write' as 'Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.' The 'Lookup Filter' section shows 'No lookup filters defined.' There is also a 'Validation Rules' section with a 'New' button and 'No validation rules defined.'

## Creating Text Field in Jewel Customer Object :

The screenshot shows the Salesforce Setup interface for the 'Jewel Customer' object. The left sidebar contains a navigation menu with options like 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, and Triggers. The main content area is titled 'Jewel Customer Custom Field City' and includes a 'Back to Jewel Customer' link. Below this, there are tabs for 'Custom Field Definition Detail', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Custom Field Definition Detail' tab is active, showing a table of field information. The table has columns for Field Label, Field Name, API Name, Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By, and Modified By. The field information is as follows:

Field Label	Field Name	API Name	Description	Help Text	Data Owner	Field Usage	Data Sensitivity Level	Compliance Categorization	Created By	Modified By
City	City	City__c							Gokela Mithran	8/27/2025, 9:48 PM

Below the table, there are sections for 'General Options' and 'Text Options'. The 'General Options' section shows 'Required' as ☐, 'Unique' as ☐, 'Case Sensitive' as ☐, 'External ID' as ☐, and 'Default Value' as . The 'Text Options' section shows 'Length' as 20. There is also a 'Validation Rules' section with a 'New' button and 'No validation rules defined.'

## Creating the Phone field in object Jewel Customer :

The screenshot displays the Salesforce Setup interface for configuring a custom field. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area is titled 'Jewel Customer Custom Field' and 'Phone'. Below the title, there are tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section contains a table with the following details:

Field Label	Phone	Object Name	Jewel Customer
Field Name	Phone	Data Type	Phone
API Name	Phone__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Gokela Mithran, 8/27/2025, 9:50 PM	Modified By	Gokela Mithran, 8/27/2025, 9:50 PM

The 'General Options' section includes a 'Required' checkbox (unchecked) and a 'Default Value' field. The 'Validation Rules' section shows 'No validation rules defined' with a 'New' button and a 'Validation Rules Help' link. At the bottom, there is a 'Back To Top' link and a note 'Always show me more records per related list'.

## Creating the Email field in object Jewel Customer :

The screenshot displays the Salesforce Setup interface for configuring a custom field. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area is titled 'Jewel Customer Custom Field' and 'Email'. Below the title, there are tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section contains a table with the following details:

Field Label	Email	Object Name	Jewel Customer
Field Name <th>Email</th> <td>Data Type</td> <td>Email</td>	Email	Data Type	Email
API Name	Email__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Gokela Mithran, 8/27/2025, 9:51 PM	Modified By	Gokela Mithran, 8/27/2025, 9:51 PM

The 'General Options' section includes checkboxes for 'Required' (unchecked), 'Unique' (unchecked), and 'External ID' (unchecked), along with a 'Default Value' field. The 'Validation Rules' section shows 'No validation rules defined' with a 'New' button and a 'Validation Rules Help' link. At the bottom, there is a 'Back To Top' link and a note 'Always show me more records per related list'.

## Creating Fields in Item :

- The number field in Item object.
- Picklist Field in Item Object.

The screenshot shows the 'Custom Field Definition Detail' page for a custom field named 'Purity' on the 'Item' object. The page is part of the 'Setup > OBJECT MANAGER' navigation. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area is divided into sections: 'Field Information', 'General Options', and 'Number Options'. The 'Field Information' section includes fields for Field Label, Field Name, API Name, Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'General Options' section includes checkboxes for Required, Unique, External ID, AI Prediction, and Default Value. The 'Number Options' section includes fields for Length and Decimal Places. The page also shows the field's creation and modification details.

Field Information	
Field Label	Purity
Field Name	Purity
API Name	Purity__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Gokula Mithran, 8/27/2025, 9:53 PM
Modified By	Gokula Mithran, 8/27/2025, 9:53 PM

General Options	
Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
AI Prediction	<input type="checkbox"/>
Default Value	

Number Options	
Length	2
Decimal Places	0

The screenshot shows the 'Custom Field Definition Detail' page for a custom field named 'Item Type' on the 'Item' object. The page is part of the 'Setup > OBJECT MANAGER' navigation. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area is divided into sections: 'Field Information', 'General Options', 'Picklist Options', and 'Picklist Values Used'. The 'Field Information' section includes fields for Field Label, Field Name, API Name, Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'General Options' section includes checkboxes for Required and Default Value. The 'Picklist Options' section includes a checkbox for 'Restrict picklist to the values defined in the value set' and a 'Controlling Field' dropdown. The 'Picklist Values Used' section includes a field for 'Active and inactive picklist values'. The page also shows the field's creation and modification details.

Field Information	
Field Label	Item Type
Field Name	Item_Type
API Name	Item_Type__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Gokula Mithran, 8/27/2025, 9:55 PM
Modified By	Gokula Mithran, 8/27/2025, 9:55 PM

General Options	
Required	<input type="checkbox"/>
Default Value	<input type="checkbox"/>

Picklist Options	
Restrict picklist to the values defined in the value set	<input checked="" type="checkbox"/>
Controlling Field	[New]

Picklist Values Used	
Active and inactive picklist values	2 (1,000 max)

## Creating Remaining Fields in Objects :

For Jewel Customer:

The screenshot shows the Salesforce Setup interface for the 'Jewel Customer' object. The left sidebar contains a navigation menu with options like 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, and Triggers. The main content area is titled 'Fields & Relationships' and shows 11 items, sorted by Field Label. The table below lists the fields for the Jewel Customer object.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Country	Country__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
State	State__c	Text(20)		
Street	Street__c	Text(20)		
Zip/Postal code	Zip_Postal_code__c	Text(6)		

For Items :

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, 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 'Fields & Relationships' and shows 23 items, sorted by Field Label. The table below lists the fields for the Item object.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	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 Id	Name	Auto Number		✓
Item Type	Item_Type__c	Picklist		
KDM	KDM__c	Formula (Currency)		
Last Modified By	LastModifiedById	Lookup(User)		
Making Charges	Making_Charges__c	Formula (Currency)		
Ornament	Ornament__c	Text(20)		

For the Customer Order :

The screenshot shows the Salesforce Setup interface for the 'Customer Order' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships (selected), 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, and Triggers. The main content area is titled 'Fields & Relationships' and shows a table of 6 items, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (CreatedBy, Lookup(User)), Customer (Customer\_\_c, Lookup(Jewel Customer)), Customer Order Id (Name, Auto Number), Item (Item\_\_c, Master-Detail(Item)), Last Modified By (LastModifiedBy, Lookup(User)), and Order Status (Order\_Status\_\_c, Picklist).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Customer	Customer__c	Lookup(Jewel Customer)		✓
Customer Order Id	Name	Auto Number		✓
Item	Item__c	Master-Detail(Item)		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Order Status	Order_Status__c	Picklist		

For the Price :

The screenshot shows the Salesforce Setup interface for the 'Price' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships (selected), 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, and Triggers. The main content area is titled 'Fields & Relationships' and shows a table of 6 items, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (CreatedBy, Lookup(User)), Gold Price (Gold\_Price\_\_c, Currency(8, 0)), Last Modified By (LastModifiedBy, Lookup(User)), Owner (OwnerId, Lookup(User,Group)), Price (Name, Auto Number), and Silver Price (Silver\_Price\_\_c, Currency(8, 5)).

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

For the Billing :

Setup

Home

Object Manager

Search Setup

Star

Plus

Cloud

Help

Settings

Notifications

Profile

SETUP > OBJECT MANAGER

Billing

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

Fields & Relationships

16 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Billing Id	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Gold/Silver Price	Gold_Silver_Price__c	Formula (Currency)		
Item	Item__c	Lookup(Item)		✓
KDM Charge	KDM_Charge__c	Formula (Currency)		
Last Modified By	LastModifiedById	Lookup(User)		
Making Charges	Making_Charges__c	Formula (Currency)		
Ornament	Ornament__c	Formula (Text)		
Owner	OwnerId	Lookup(User,Group)		✓
Paid Amount	Paid_Amount__c	Currency(18, 0)		
Revised Amount	Revised_Amount__c	Currency(18, 0)		

Creating Gold Smith Profile :

Setup

Home

Object Manager

Search Setup

Star

Plus

Cloud

Help

Settings

Notifications

Profile

Q prof

Users

Profiles

Didn't find what you're looking for?

Try using Global Search.

SETUP

Profiles

Profiles

Help for this Page

All Profiles

Edit

Delete

Create New View

New Profile

⌵

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Gold Partner User	Gold Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit   Delete	Gold Smith	Salesforce	<input checked="" type="checkbox"/>

1-2 of 2

0 Selected

Previous

Next

Page 1 of 1



## Creating Gold Smith Role :

- And for worker also

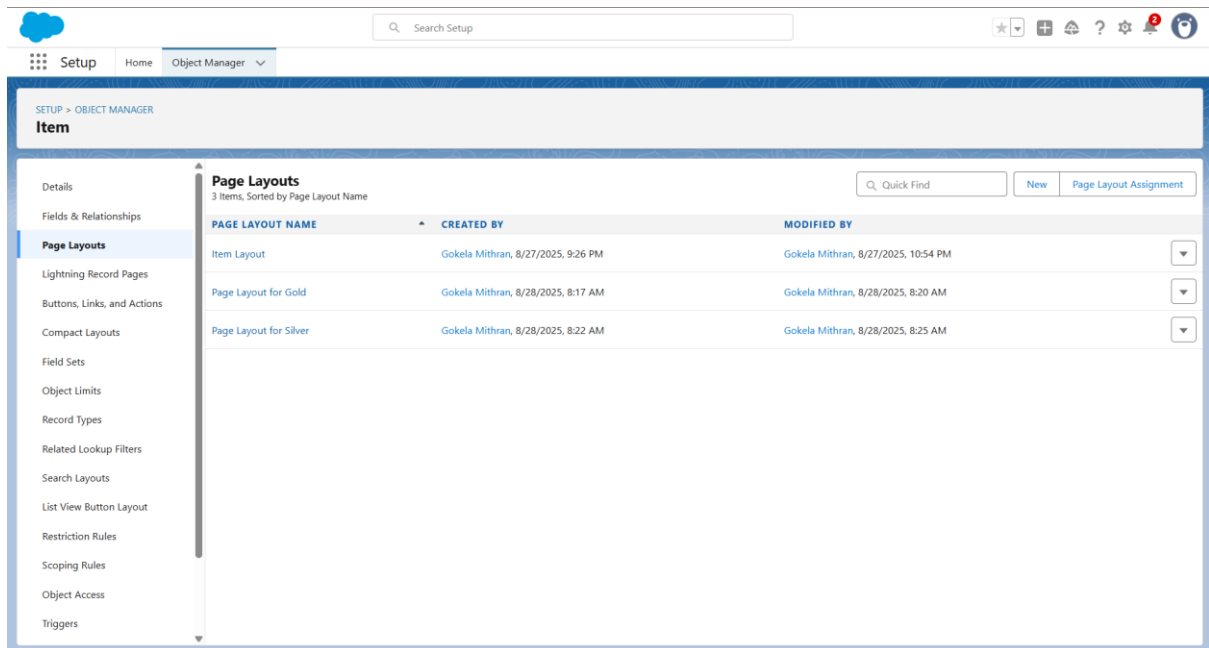
The screenshot shows the Salesforce Setup interface with the 'Roles' tab selected. The left sidebar contains navigation links for Users, Roles, Feature Settings, Sales, Service, and Case Teams. The main content area is titled 'Creating the Role Hierarchy' and displays a tree view of the organization's role hierarchy. The hierarchy starts with 'SNM' at the top, followed by 'CEO', 'COO', 'Gold Smith', 'Workers', 'SVP Customer Service & Support', 'Customer Support International', 'Customer Support North America', 'Installation & Repair Services', 'SVP Human Resources', 'SVP Sales & Marketing', and 'VP International Sales'. Each role in the hierarchy has an 'Add Role' button next to it.

## Create User :

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The left sidebar contains navigation links for Users, Roles, Feature Settings, Sales, Service, and Case Teams. The main content area is titled 'All Users' and displays a list of users. The list includes columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are Chatter Expert, EPIC\_OrgFarm, Mikaelson\_hai, Mikaelson\_Kol, Mikaelson\_Niklaus, Mithran\_Gokela, User\_Integration, and User\_Security. Each user has an 'Edit' button next to their name. The list is sorted by Full Name.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit	Chatter Expert	Chatter	chatty00d9l000009zju1uao.5rrphhbodawx@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>   Edit	EPIC_OrgFarm	OEPIG	epic.d3322791944@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/>   Edit	Mikaelson_hai	hmika	haimika@gmail.com	Gold Smith	✓	Workers Profile
<input type="checkbox"/>   Edit	Mikaelson_Kol	kmika	kolmika1@org.com	Workers	✓	Workers Profile
<input type="checkbox"/>   Edit	Mikaelson_Niklaus	nmika	niklaus1@org.com	Gold Smith	✓	Gold Smith
<input type="checkbox"/>   Edit	Mithran_Gokela	23b	23bcagokelamithran533@agentforce.com		✓	System Administrator
<input type="checkbox"/>   Edit	User_Integration	integ	integration@00d9l000009zju1uao.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User_Security	sec	insightssecurity@00d9l000009zju1uao.com		✓	Analytics Cloud Security User

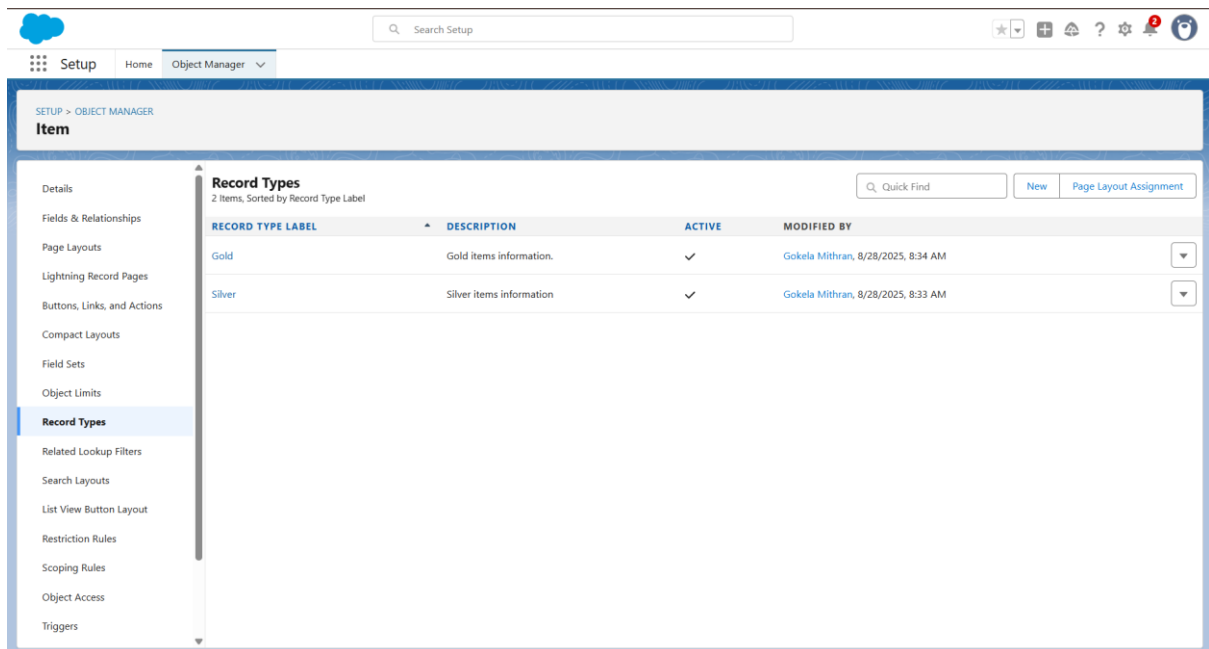
To Create a Gold & Silver Page layout :



The screenshot shows the Salesforce Setup interface, specifically the 'Object Manager' section for the 'Item' object. The 'Page Layouts' tab is selected, displaying a list of three page layouts. The left sidebar shows the navigation menu with 'Page Layouts' highlighted. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area has a search bar and buttons for 'New' and 'Page Layout Assignment'. The table lists the following page layouts:

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Item Layout	Gokela Mithran, 8/27/2025, 9:26 PM	Gokela Mithran, 8/27/2025, 10:54 PM
Page Layout for Gold	Gokela Mithran, 8/28/2025, 8:17 AM	Gokela Mithran, 8/28/2025, 8:20 AM
Page Layout for Silver	Gokela Mithran, 8/28/2025, 8:22 AM	Gokela Mithran, 8/28/2025, 8:25 AM

To create a Record Type :



The screenshot shows the Salesforce Setup interface, specifically the 'Object Manager' section for the 'Item' object. The 'Record Types' tab is selected, displaying a list of two record types. The left sidebar shows the navigation menu with 'Record Types' highlighted. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area has a search bar and buttons for 'New' and 'Page Layout Assignment'. The table lists the following record types:

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information.	✓	Gokela Mithran, 8/28/2025, 8:34 AM
Silver	Silver items information	✓	Gokela Mithran, 8/28/2025, 8:33 AM

Create a Trigger Handler class :

**CODE:**

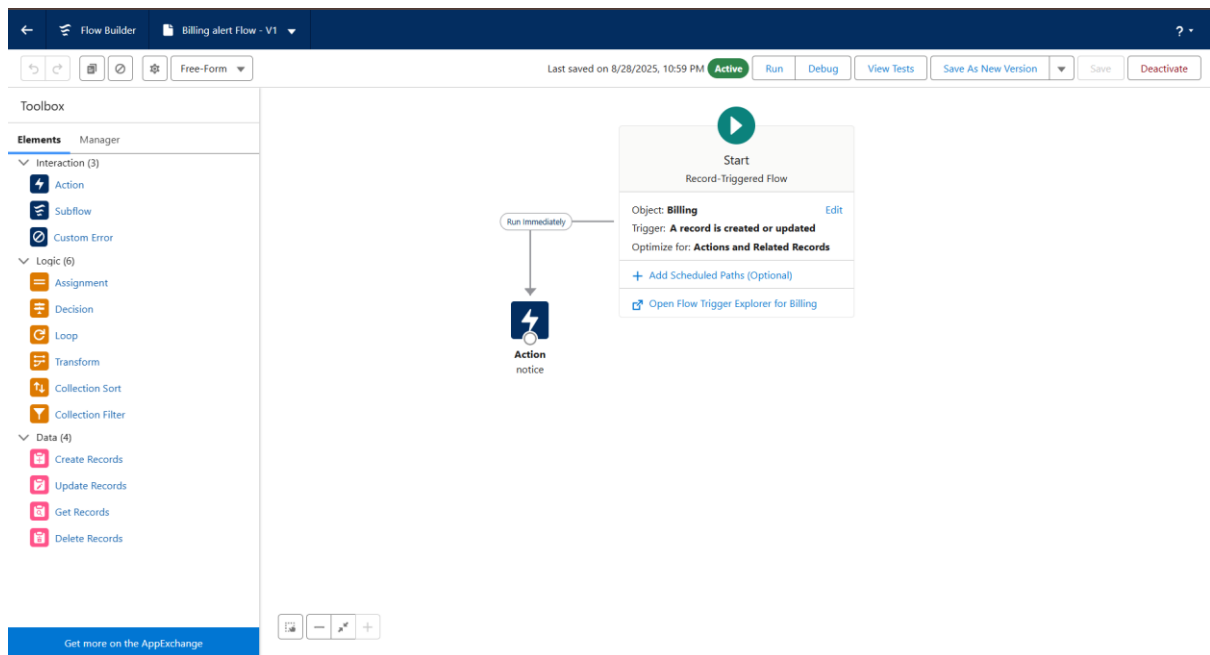
```
public class UpdatePaidAmountTriggerHandler {  
    public static void handleBeforeInsert(List<Billing__c> newBillings) {  
        for (Billing__c billing : newBillings) {  
            billing.Paid_Amount__c = billing.Paying_Amount__c;  
        }  
    }  
  
    public static void handleBeforeUpdate(Map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

**CODE:**

```
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);  
    }  
}
```

## Create a Flow :



















## FUNCTIONAL AND PERFORMANCE TESTING:(Result)

### Jewel Customer

















The screenshot shows the "Jewel Customers" list view in Salesforce. The interface includes a search bar at the top, a "Setup" button, and a "Recently Viewed" section with a dropdown arrow. Below this, a table lists 9 items, each with a checkbox and a dropdown menu. The table is titled "Jewel Customers" and shows "9 items • Updated an hour ago".

	Customer Name	
1	<input type="checkbox"/> Hari	▼
2	<input type="checkbox"/> Balaji	▼
3	<input type="checkbox"/> Udaya	▼
4	<input type="checkbox"/> Mithran	▼
5	<input type="checkbox"/> Chandru	▼
6	<input type="checkbox"/> sameer	▼
7	<input type="checkbox"/> Ajay	▼
8	<input type="checkbox"/> Naveen	▼
9	<input type="checkbox"/> Dinesh	▼

## Item

		<input type="text" value="Search..."/>		      	
Jewellery Inventory ...		Items		▼	
		Recently Viewed			
9 Items • Updated a few seconds ago		<input type="text" value="Search this list..."/>		     	
<input type="checkbox"/>		Item Id		▼	
1	<input type="checkbox"/>	Item-03		▼	
2	<input type="checkbox"/>	Item-06		▼	
3	<input type="checkbox"/>	Item-04		▼	
4	<input type="checkbox"/>	Item-07		▼	
5	<input type="checkbox"/>	Item-02		▼	
6	<input type="checkbox"/>	Item-05		▼	
7	<input type="checkbox"/>	Item-09		▼	
8	<input type="checkbox"/>	Item-08		▼	
9	<input type="checkbox"/>	Item-01		▼	

## Customer Order

		<input type="text" value="Search..."/>		      	
Jewellery Inventory ...		Customer Orders		▼	
		Recently Viewed			
9 Items • Updated a few seconds ago		<input type="text" value="Search this list..."/>		     	
<input type="checkbox"/>		Customer Order Id		▼	
1	<input type="checkbox"/>	Customer Order-04		▼	
2	<input type="checkbox"/>	Customer Order-05		▼	
3	<input type="checkbox"/>	Customer Order-07		▼	
4	<input type="checkbox"/>	Customer Order-06		▼	
5	<input type="checkbox"/>	Customer Order-09		▼	
6	<input type="checkbox"/>	Customer Order-08		▼	
7	<input type="checkbox"/>	Customer Order-01		▼	
8	<input type="checkbox"/>	Customer Order-03		▼	
9	<input type="checkbox"/>	Customer Order-02		▼	

# Prices

Jewellery Inventory ...

Prices

Prices

Recently Viewed

3 items • Updated a few seconds ago

New

Import

Change Owner

Assign Label

Search this list...

<input type="checkbox"/>	Price	
1	<input type="checkbox"/> Price-02	<div></div>
2	<input type="checkbox"/> Price-03	<div></div>
3	<input type="checkbox"/> Price-01	<div></div>

# Billing

Jewellery Inventory ...

Billings

Billings

Recently Viewed

9 items • Updated a few seconds ago

New

Import

Change Owner

Assign Label

Search this list...

<input type="checkbox"/>	Billing Id	
1	<input type="checkbox"/> Billing-03	<div></div>
2	<input type="checkbox"/> Billing-02	<div></div>
3	<input type="checkbox"/> Billing-05	<div></div>
4	<input type="checkbox"/> Billing-04	<div></div>
5	<input type="checkbox"/> Billing-06	<div></div>
6	<input type="checkbox"/> Billing-07	<div></div>
7	<input type="checkbox"/> Billing-09	<div></div>
8	<input type="checkbox"/> Billing-08	<div></div>
9	<input type="checkbox"/> Billing-01	<div></div>

The screenshot displays the 'Prices Report 1' interface. At the top, there's a search bar labeled 'Q Search...'. Below it, the breadcrumb navigation shows 'Jewellery Inventory ... > Reports > Prices Report 1'. The report title 'Report: Prices Prices Report 1' is followed by action buttons: 'Enable Field Editing', 'Add Chart', 'Filter', 'Refresh', 'Edit', and 'Dropdown'. Summary statistics are shown: Total Records: 3, Total Gold Price: \$201,000, and Total Silver Price: \$133,000.00000.

	Price: ID	Price: Price	Gold Price	Silver Price	Price: Owner Name	Price: Owner Alias	Price: Created By	Price: Created Alias	Price: Created Date	Price: Last Modified By	Price: Last Modified
1	a03gL00000Ap9Dc	Price-01	\$78,000	\$55,000.00000	Gokela Mithran	23b	Gokela Mithran	23b	8/28/2025	Gokela Mithran	23b
2	a03gL00000Ap9LUP	Price-02	\$78,000	\$55,000.00000	Gokela Mithran	23b	Gokela Mithran	23b	8/28/2025	Gokela Mithran	23b
3	a03gL00000Ap9KZV	Price-03	\$45,000	\$23,000.00000	Gokela Mithran	23b	Gokela Mithran	23b	8/28/2025	Gokela Mithran	23b
4			\$201,000	\$133,000.00000							

Jewellery Inventory ...

Dashboards

Dashboard01

Dashboard

Dashboard01

As of Sep 17, 2025, 7:59 AM
Viewing as Gokela Mithran

Refresh
Edit
Subscribe

Prices Report 1

Price: ID ↑	Price: Price	Gold Price	Silver Price	Price: Owner Name
a03gL00000Ap0Dc	Price-01	\$78k	\$55.00000x	Gokela Mithran
a03gL00000Ap4UP	Price-02	\$78k	\$55.00000x	Gokela Mithran
a03gL00000ApNZV	Price-03	\$45k	\$23.00000x	Gokela Mithran

View Report (Prices Report 1)
As of Sep 17, 2025, 7:59 AM

