

CRM APPLICATION

FOR JEWEL

MANAGEMENT

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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 includes 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>



salesforce.com/form/dev



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Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

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Object Created

Jewel customer – To store and manage information about customer.

The screenshot shows the Salesforce Setup interface. At the top, there is a navigation bar with a home icon, the URL 'elop.lightning.force.com', a plus sign for creating new items, a notification badge with the number '4', and a three-dot menu. Below the navigation bar is the Salesforce classic header with a cloud icon, user profile, and a search bar labeled 'Search Setup'. The main content area is titled 'SETUP > OBJECT MANAGER' and displays the details for the 'Jewel Customer' object. On the left, a sidebar lists various configuration tabs: 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, and Conditional Field Formatting. The main details section shows the following fields:

Details	Details
Description	<input type="text"/>
API Name	Jewel_Customer__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Jewel Customer
Plural Label	Jewel Customers
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input type="checkbox"/>
Track Field History	<input type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the bottom right of the details section are 'Edit' and 'Delete' buttons.

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

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** elop.lightning.force.com
- Setup Bar:** Includes icons for Home, Object Manager, and various system settings.
- Search Bar:** Search Setup
- Breadcrumbs:** SETUP > OBJECT MANAGER
- Section:** Item
- Left Sidebar (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.
- Right Panel (Details):**
 - Description:** 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:**
- Buttons:** Edit, Delete

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

The screenshot shows the Salesforce Setup interface for the 'Jewel Customer' object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The 'Validation Rules' section is currently selected. The main content area displays the 'Jewel Customer Validation Rule' detail page. The rule is named 'Postal_Code' and is active. The error condition formula is:

```
AND(  
    OR(  
        LEN(Zip_Postal_code__c) <> 6, NOT(REGEX(Zip_Postal_code__c, "[0-9]{6}$"))),  
        NOT(ISBLANK(Zip_Postal_code__c))  
    )
```

The error message is: "Must contain 6 digits", select the Error location as Field and select the field as "Zip/Postal code". The rule was created by Renuga.sri.R on 8/31/2025, 3:07 AM and modified by the same user on the same date.

Roles for gold smith - A Role is user visibility access at the record level.

Gold – Expand all and click on add role.

Users – To create two more user in same profile.

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** elop.lightning.force.com
- Setup Bar:** Includes icons for Home, Object Manager, and a notification bell with 5 messages.
- Left Sidebar:**
 - Users:** Selected under 'User Management Settings'.
 - Other sections include Feature Settings, Data.com, Service, User Interface, and Console Settings.
- Main Content Area:**
 - Section Header:** SETUP Users
 - Section Subtitle:** All Users
 - Description:** On this page you can create, view, and manage users. To get more licenses, use the Your Account app. [Let's Go](#)
 - View Options:** All Users, Edit, Create New View, A-Z, and Other.
 - User Table:**

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00dg 000009xqefua2.xc92e7qw7q6v@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Frs User
Edit	EPIC_OrgFarm	QEPIC	epic.ce436a7388ae@orgfarm.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administratr
Edit	Mikaelson, Kol	kmika	renuga@renu.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Worker profiles
Edit	Mikaelson, Niklaus	nmika	renu@renu.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Gold Smith
Edit	R.Renuga.sri	ren	renugasri900443@agentforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administratr
Edit	User_ Integration	integ	integration@00dg 000009xqefua2.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00dg 000009xqefua2.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security U

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.



elop.lightning.force.com



4



2



Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Item

Details

Page Layouts

3 Items, Sorted by Page Layout Name

Quick Find

New

Page Layout Assignment

Fields & Relationships

PAGE LAYOUT NAME... ▾ CREATED BY

MODIFIED BY

Page Layouts

Lightning Record Pages	Item Layout	Renuga sri R, 8/31/2025, 1:53 AM	Renuga sri R, 8/31/2025, 11:13 PM	
Buttons, Links, and Actions	Page Layout for Gold	Renuga sri R, 9/1/2025, 6:48 AM	Renuga sri R, 9/1/2025, 6:53 AM	
Compact Layouts	Page Layout for Silver	Renuga sri R, 9/1/2025, 6:59 AM	Renuga sri R, 9/1/2025, 7:01 AM	

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

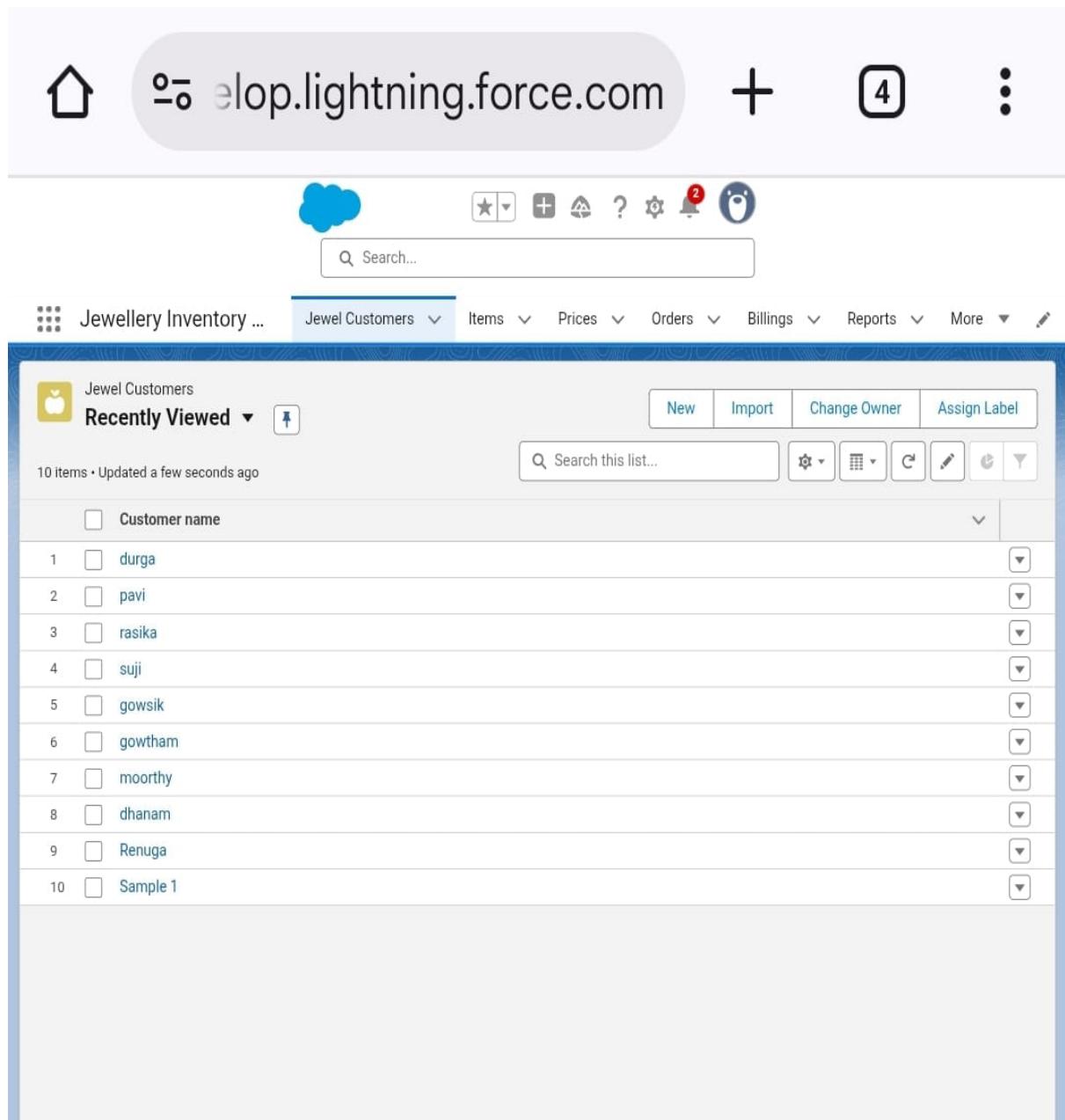
Record Types – Record types are a way of grouping many records of one type for that object. Record types allow administrators to create a different page layout with custom picklist fields and values for the same business process and various business process.

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** elop.lightning.force.com
- Setup Navigation:** Home, Object Manager
- Section:** SETUP > OBJECT MANAGER
- Page Title:** Item
- Left Sidebar:** Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types (selected).
- Record Types Table:**

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
- Quick Find:** Quick Find
- Buttons:** New, Page Layout Assignment

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



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 Experience interface. At the top, there is a header bar with a home icon, the URL 'elop.lightning.force.com', a plus sign for new tabs, a notification badge with the number '4', and a three-dot menu. Below the header is the Salesforce logo and a search bar labeled 'Search Setup'. The main content area has a 'Setup' tab selected, followed by 'Home' and 'Object Manager'. On the left, a sidebar shows a 'Profiles' section under 'Users'. The main content area is titled 'Profiles' and displays a list of user profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. Several profiles have a checked checkbox in the 'Custom' column, indicating they are custom profiles.

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....,

The screenshot shows the Salesforce Lightning Experience App Manager page. The left sidebar has a search bar and navigation links for Setup, Home, and Object Manager. Under Apps, the 'App Manager' link is selected. A note says ' Didn't find what you're looking for? Try using Global Search.' The main area is titled 'Lightning Experience App Manager' with buttons for 'New Lightning App' and 'New External Client App'. It displays a table of 27 items, each with columns for App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The table includes rows for various standard and custom apps like All Tabs, Analytics Studio, App Launcher, Approvals, Automation, Bolt Solutions, Community, Content, Data Cloud, Data Manager, Digital Experien..., Jewellery Inven..., Lightning Usag..., Marketing CRM..., My Service Jou..., Platform, Queue Manage..., Sales, Sales, Sales Cloud Mo..., Sales Console, Salesforce Cha..., Salesforce Sch..., Service, Service Console, Site.com, and Subscription M...'. Most apps are listed as Classic or Lightning type.

App Name	Developer Name	Description	Last Modified	App Type	Visibility
All Tabs	AllTabSet	Build CRM Anal...	8/24/2025, 2:2...	Classic	✓
Analytics Studio	Insights	Build CRM Anal...	8/24/2025, 2:2...	Classic	✓
App Launcher	AppLauncher	App Launcher t...	8/24/2025, 2:2...	Classic	✓
Approvals	Approvals	Manage appro...	8/24/2025, 2:2...	Lightning	✓
Automation	FlowsApp	Automate busi...	8/24/2025, 2:2...	Lightning	✓
Bolt Solutions	LightningBolt	Discover and ...	8/24/2025, 2:2...	Lightning	✓
Community	Community	Salesforce CR...	8/24/2025, 2:2...	Classic	✓
Content	Content	Salesforce CR...	8/24/2025, 2:2...	Classic	✓
Data Cloud	Audience360	Build a thoroug...	8/24/2025, 2:2...	Lightning	✓
Data Manager	DataManager	Use Data Mana...	8/24/2025, 2:2...	Lightning	✓
Digital Experien...	SalesforceCMS	Manage conte...	8/24/2025, 2:2...	Lightning	✓
Jewellery Inven...	Jewellery_Inve...	Elevate your lo...	8/31/2025, 2:2...	Lightning	✓
Lightning Usag...	LightningInstru...	View Adoption ...	8/24/2025, 2:2...	Lightning	✓
Marketing CRM...	Marketing	Track sales an...	8/24/2025, 2:2...	Classic	✓
My Service Jou...	MSJApp	Discover new c...	8/24/2025, 2:2...	Lightning	✓
Platform	Platform	The fundament...	8/24/2025, 2:2...	Classic	✓
Queue Manage...	QueueManage...	Create and ma...	8/24/2025, 2:2...	Lightning	✓
Sales	Sales	The world's mo...	8/24/2025, 2:2...	Classic	✓
Sales	LightningSales	Manage your s...	8/24/2025, 2:2...	Lightning	✓
Sales Cloud Mo...	SalesCloudMob...	New seller foc...	8/24/2025, 2:2...	Lightning	✓
Sales Console	LightningSales...	(Lightning Exp...	8/24/2025, 2:2...	Lightning	✓
Salesforce Cha...	Chatter	The Salesforce...	8/24/2025, 2:2...	Classic	✓
Salesforce Sch...	LightningSched...	Set up persona...	8/24/2025, 2:2...	Lightning	✓
Service	Service	Manage custo...	8/24/2025, 2:2...	Classic	✓
Service Console	LightningService	(Lightning Exp...	8/24/2025, 2:2...	Lightning	✓
Site.com	Sites	Build pixel-perf...	8/24/2025, 2:2...	Classic	✓
Subscription M...	RevenueCloudC...	Get started aut...	8/24/2025, 2:2...	Lightning	✓

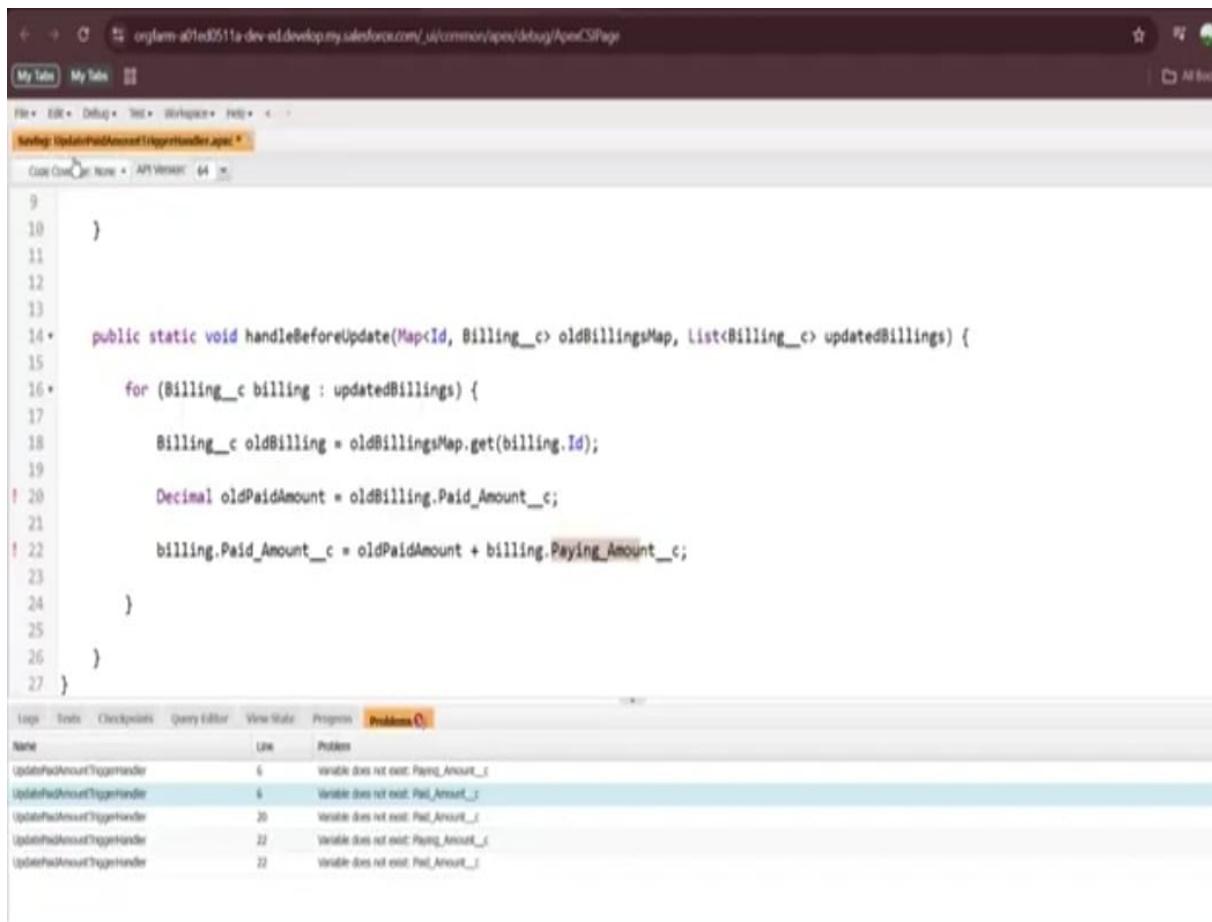
Text field: A Text field is used whenever you need to capture describe or alphanumeric details that identify, describe, or provide context about jewel items, supplier, or transaction.

Apex class – auto calculate total cost from order items.



```
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
12            billing.Paid_Amount__c = oldBilling.Paid_Amount__c;
13        }
14    }
15 }
```

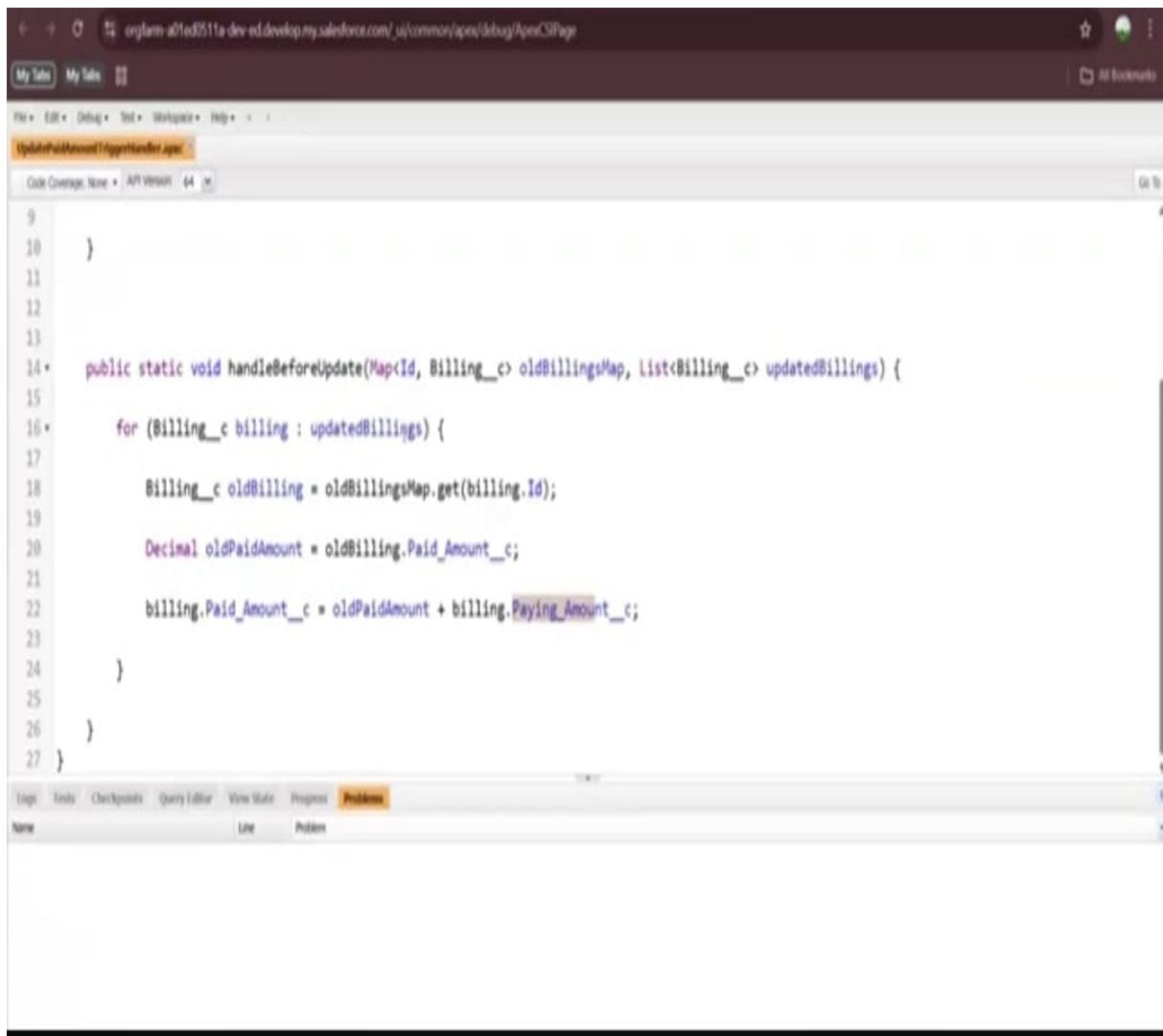
Apex trigger – auto calculate total cost from order item.



```
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 }
```

Name	Type	Problems
UpdatePaidAmountTriggerHandler	6	Variable does not exist: Paying_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: Paying_Amount__c
UpdatePaidAmountTriggerHandler	32	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.



elop.lightning.force.com



Search Setup

Setup

Home

Object Manager

Q Permission set

Users

Permission Set Groups

Permission Sets

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



SETUP

Permission Sets

Help for this Page

Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets Edit | Delete | Create New View

New

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

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.

The screenshot shows a Salesforce Lightning interface. At the top, there's a navigation bar with a home icon, the URL 'elop.lightning.force.com', a plus sign for new items, a circular icon with the number '4', and a vertical ellipsis. Below the navigation is a toolbar with icons for search, refresh, and user profile, along with a search bar containing 'Search...'. The main content area has a blue header bar with tabs for 'Jewellery Inventory ...', 'Jewel Customers', 'Items', 'Prices', 'Orders', 'Dashboards', 'More', and a pencil icon. Underneath is a section titled 'Dashboard dashboards 1'. It includes a warning message: '⚠ Last refreshed 3 days ago. Refresh this dashboard to see the latest data.' and a note: 'As of Sep 2, 2025, 9:05 AM · Viewing as Renuga sri R'. A large button labeled 'Refresh' is visible. The central part of the screen displays a report titled 'New Prices Report' with a table of data:

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	a04gL000009VmM
Price-07	\$5	a04gL000009Vr9J

At the bottom of the report, there's a link: 'View Report (New Prices ... As of Sep 2, 2025, 9:05 AM)

Reports: Report give you access to your data.

The screenshot shows a Salesforce Lightning interface. At the top, there is a navigation bar with a home icon, the URL 'elop.lightning.force.com', a plus sign for new items, a circular icon with the number '4' (indicating four notifications), and a three-dot menu icon.

Below the navigation bar is a toolbar with various icons: a blue cloud, a star with a dropdown arrow, a plus sign, a gear, a question mark, a gear with a checkmark, a bell with a red notification count of '2', and a user profile icon.

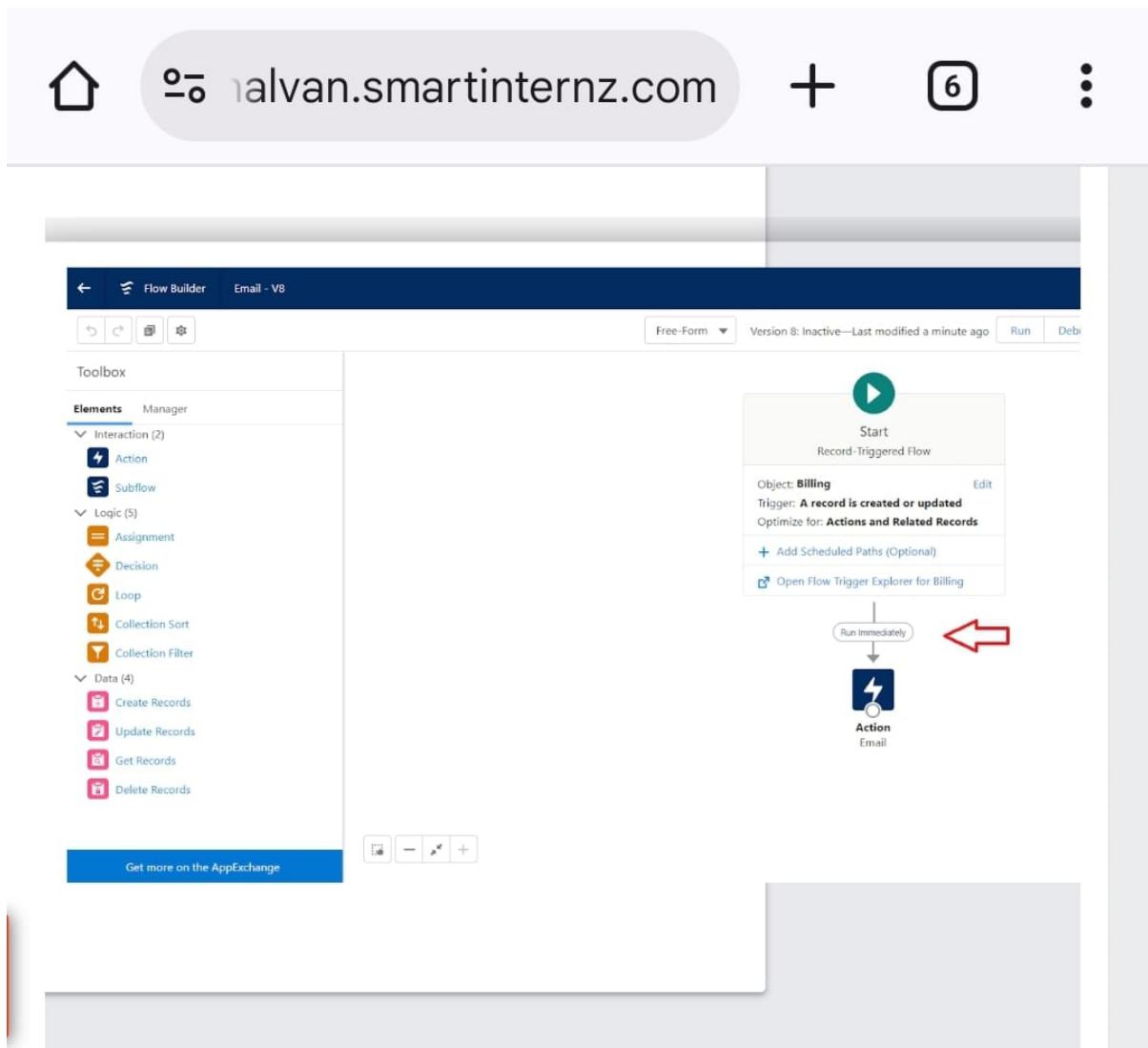
A search bar with the placeholder 'Search...' is located below the toolbar.

The main content area features a header for 'Jewellery Inventory ...' and a navigation menu with links: Jewel Customers, Items, Prices, Orders, Billings, Reports, and More.

The current page is a report titled 'Report: Prices New Prices Report'. It displays summary statistics: Total Records (10) and Total Gold Price (\$358). Below this is a table with 11 rows, each containing a Price ID, Gold Price, and a long alphanumeric string representing a Price ID.

	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 allows you to automate business processes, collect and update data, and guide users 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