CRM APPLICATION FOR JEWEL MANAGEMENT

C0LLEGE NAME : MICHAEL JOB COLLEGE OF ARTS AND SCIENCE FOR WOMEN

C0LLEGE CODE:asbru4z

TEAM ID:NM2025TMID2691

TEAM MEMBERS: 4

TEAM LEADER : GRACE.G
EMAIL ID: jaigraceg@gmail.com

TEAM MEMBER 1: ABITHA.B
EMAIL ID : abitha2006bgmail.com

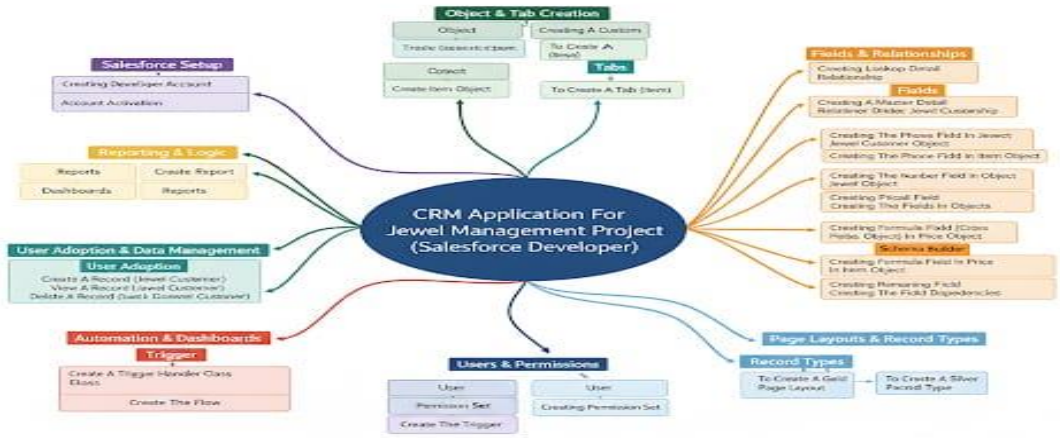
TEAM MEMBER 2: CHITRAMALA.G.P
EMAIL ID : chitramala48@mail.com

TEAM MEMBER 3:KIRUTHIKA.V
EMAIL ID : kiruthikavelmurugan52@mail.com

•Introduction

Project Overview:

The CRM Application For Jewel Management is a sales force - based system designed to manage customer relationships, jewel inventory, sales, billing, and service requests. The system automates processes such as order tracking, customer communication, loyalty program management, and reminders for product maintenance.



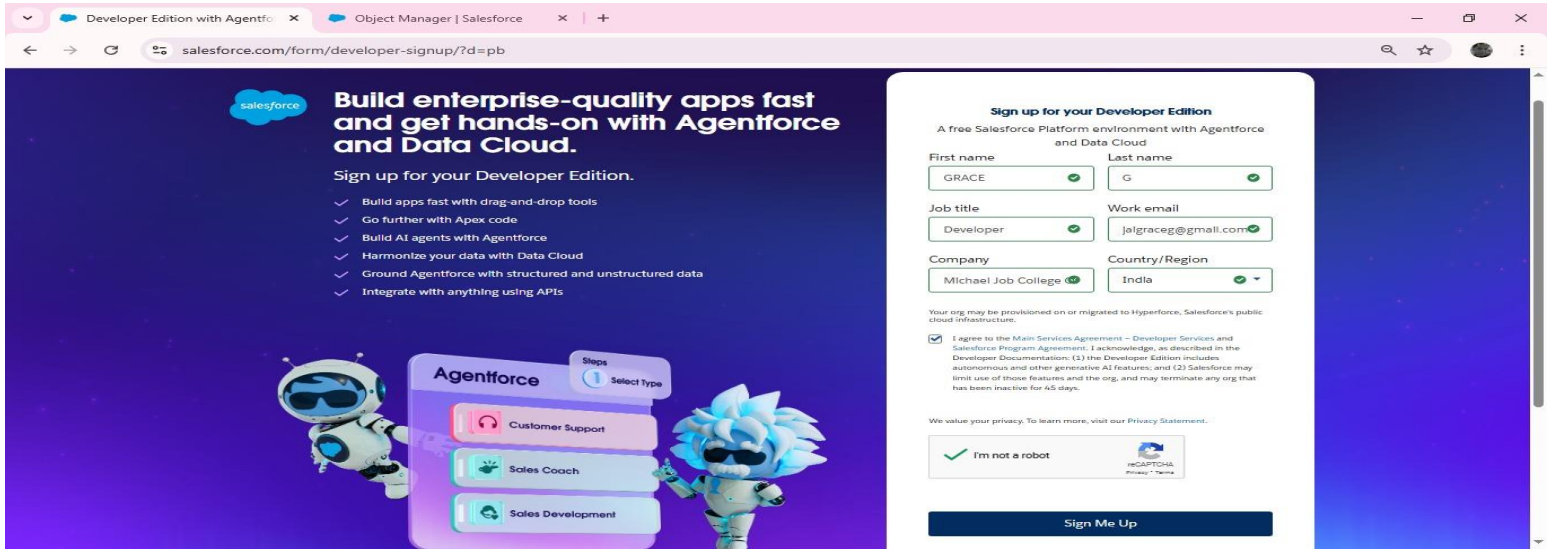
Purpose:

The main objective of this project is to enable jewel businesses to efficiently manage customers, sales, and jewel-related activities. It reduces manual errors, improves customer satisfaction, and ensures better business growth with sales force automation tools.

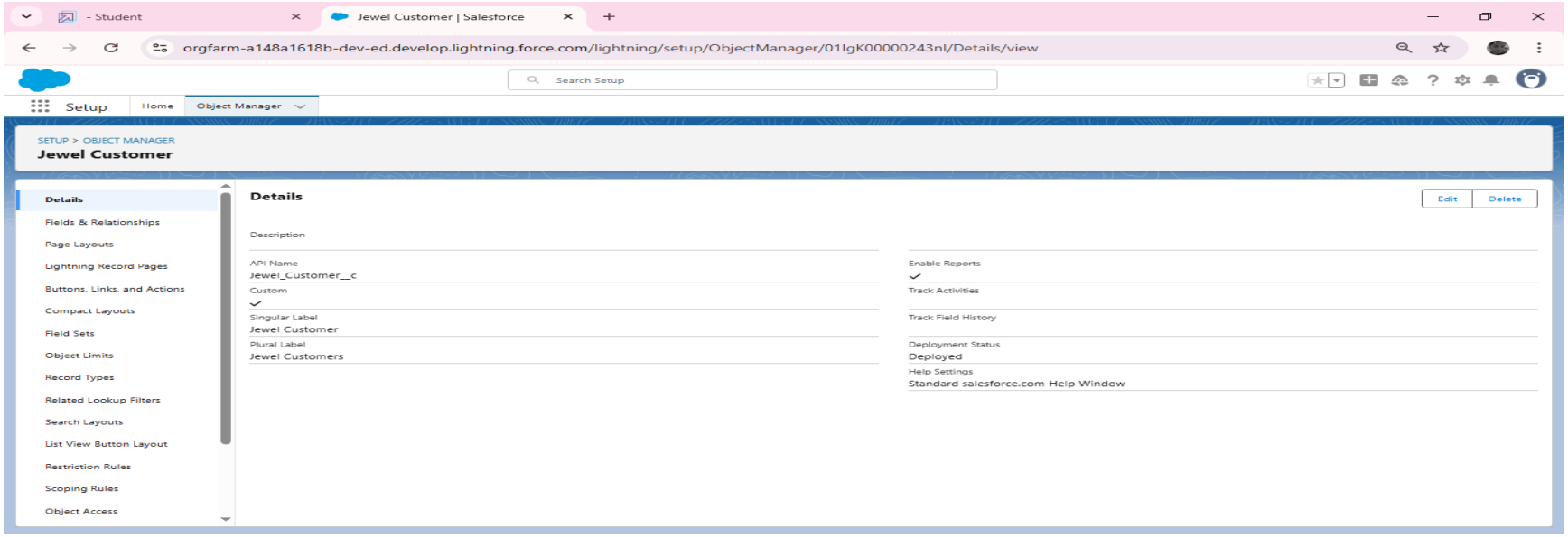
- Development Phase:

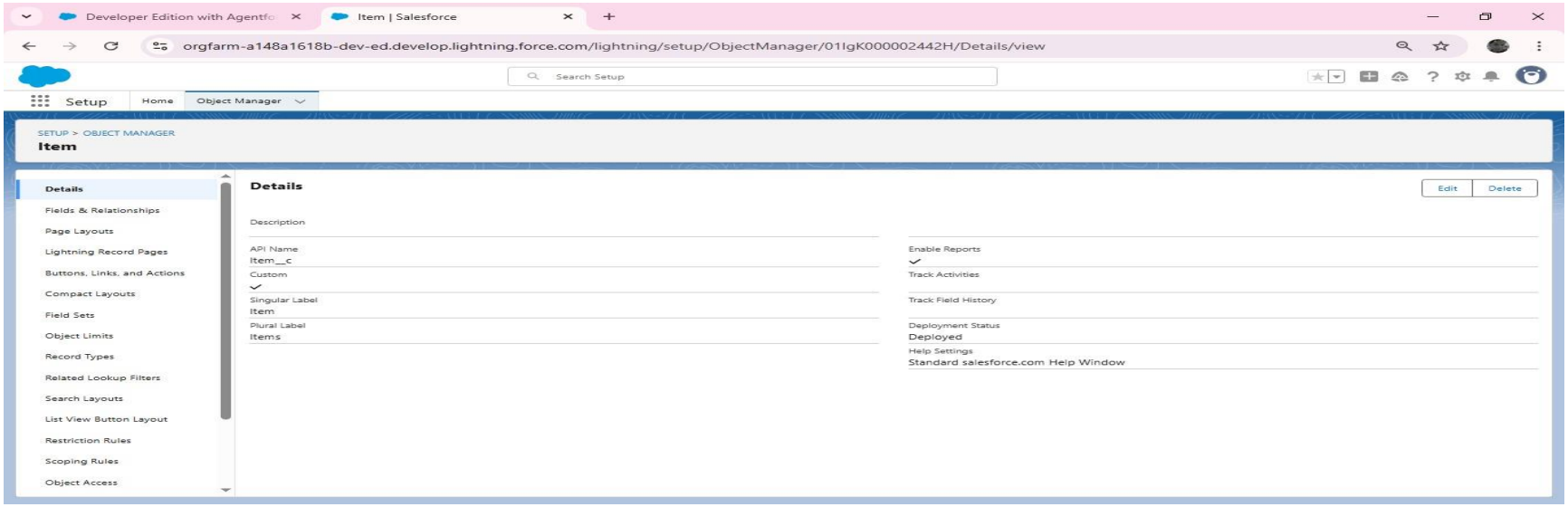
Create Developer Account By Using This URL :

https://developer.salesforce.com/signup

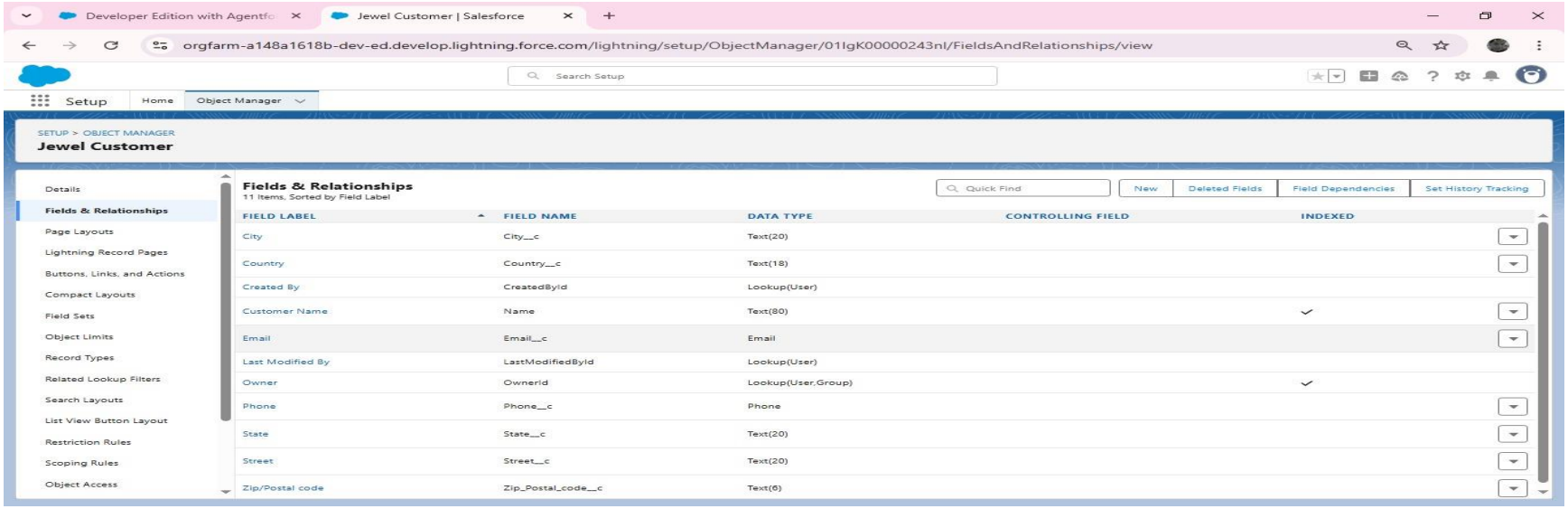


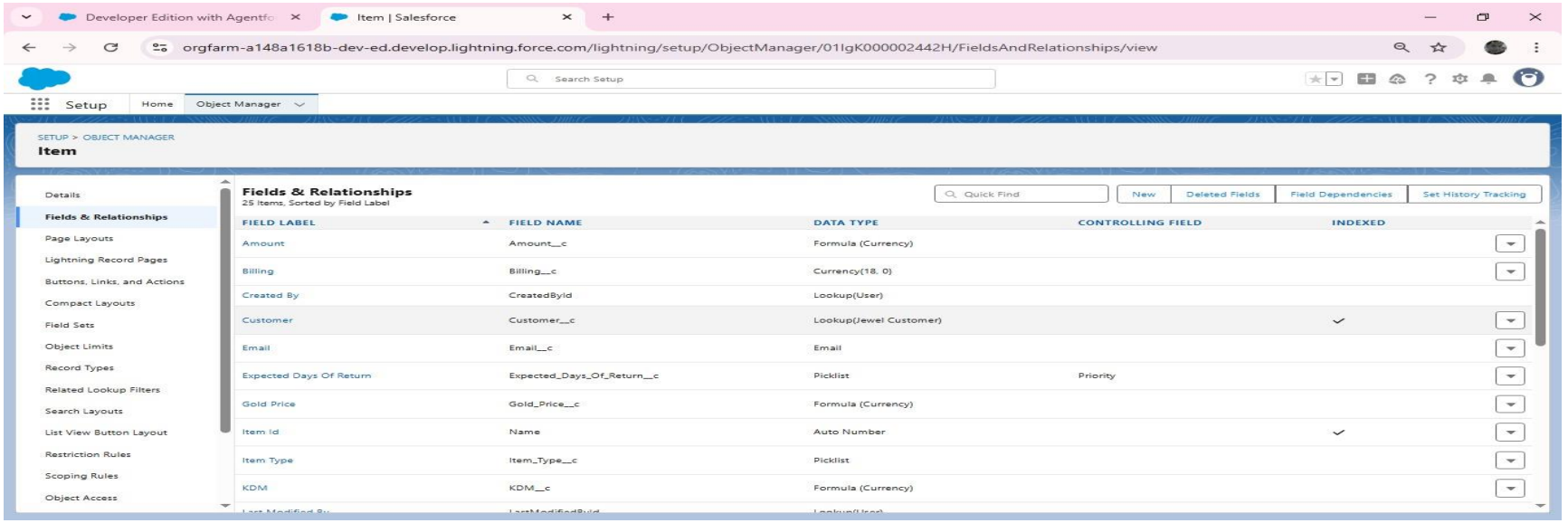
- Create Objects : Jewel Customer, Item



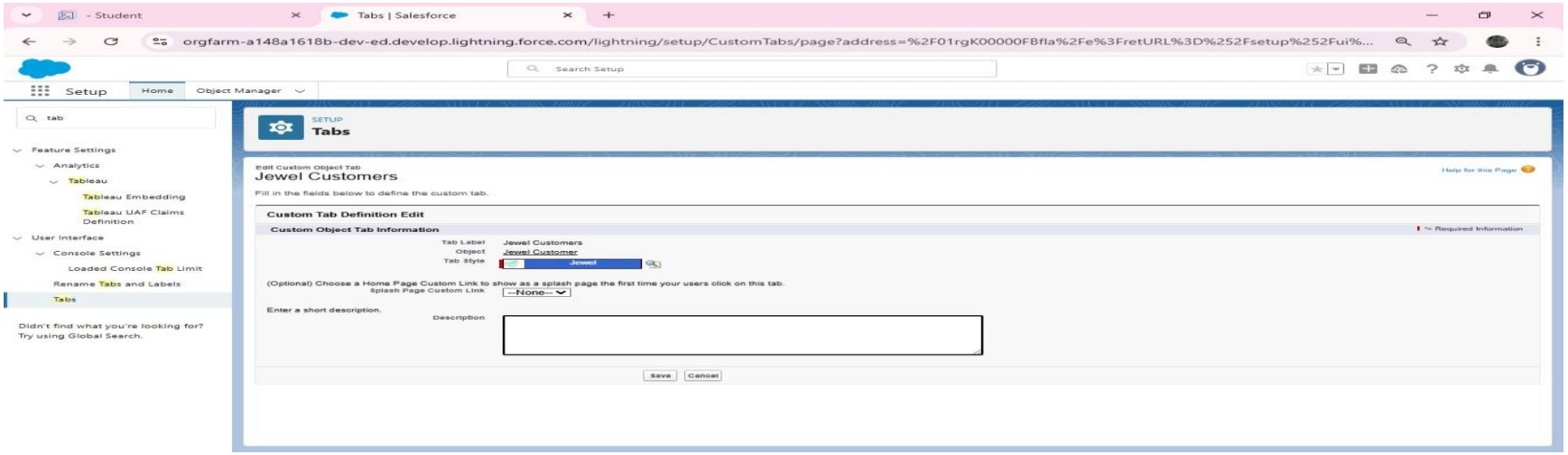


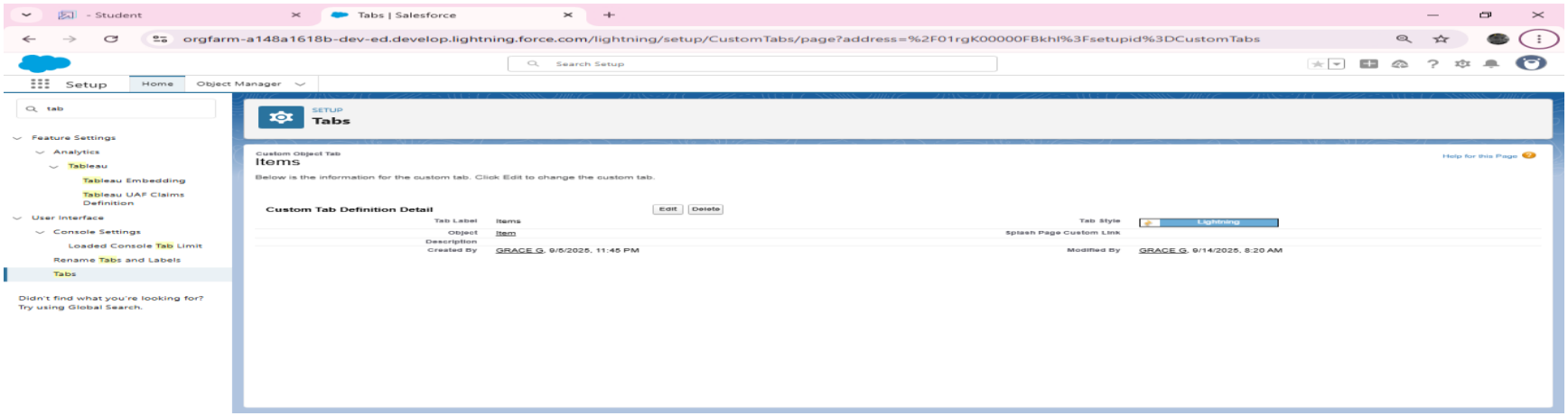
- Configured fields and Relationships



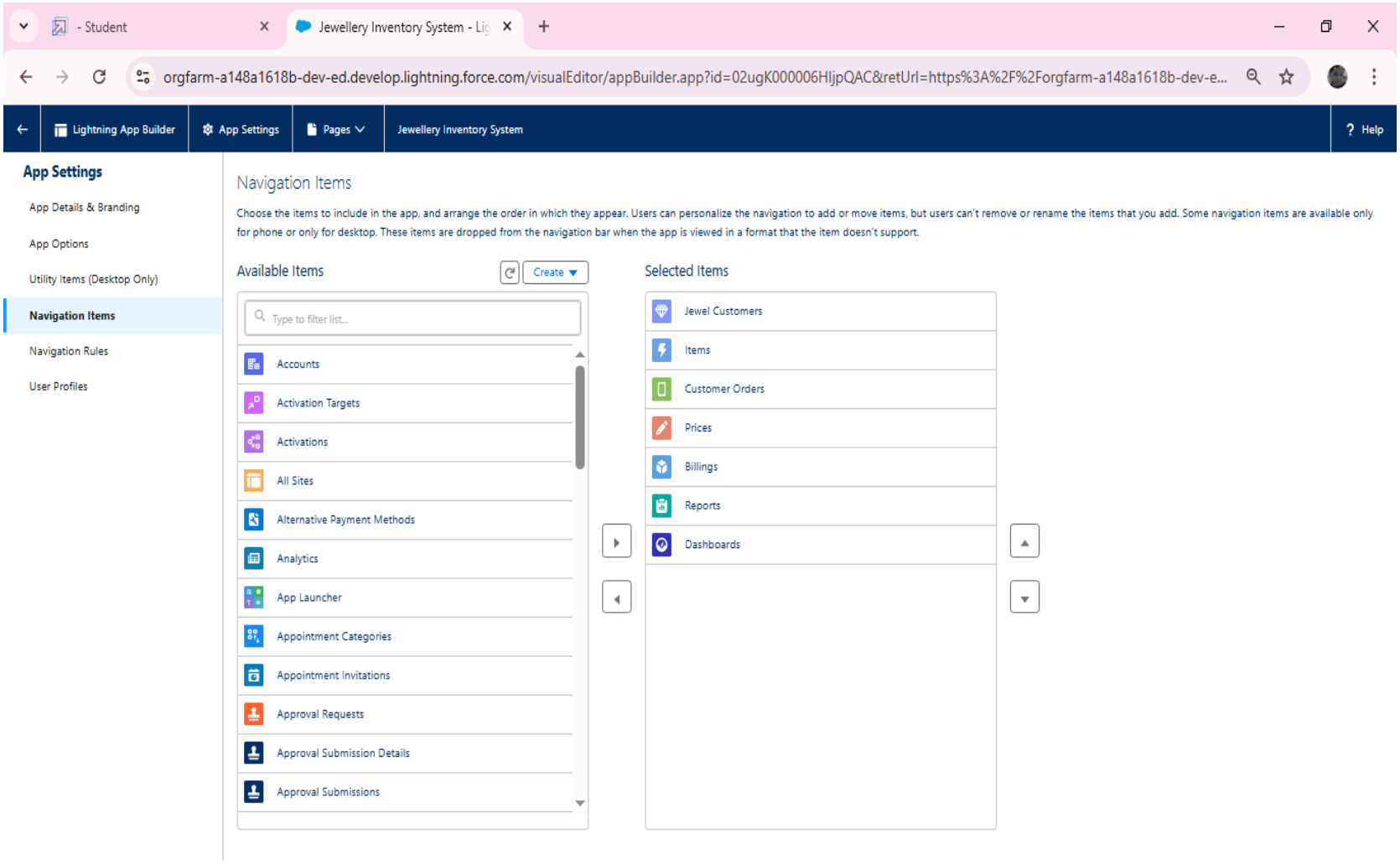


- Developed Lightning App with Relevant Tabs

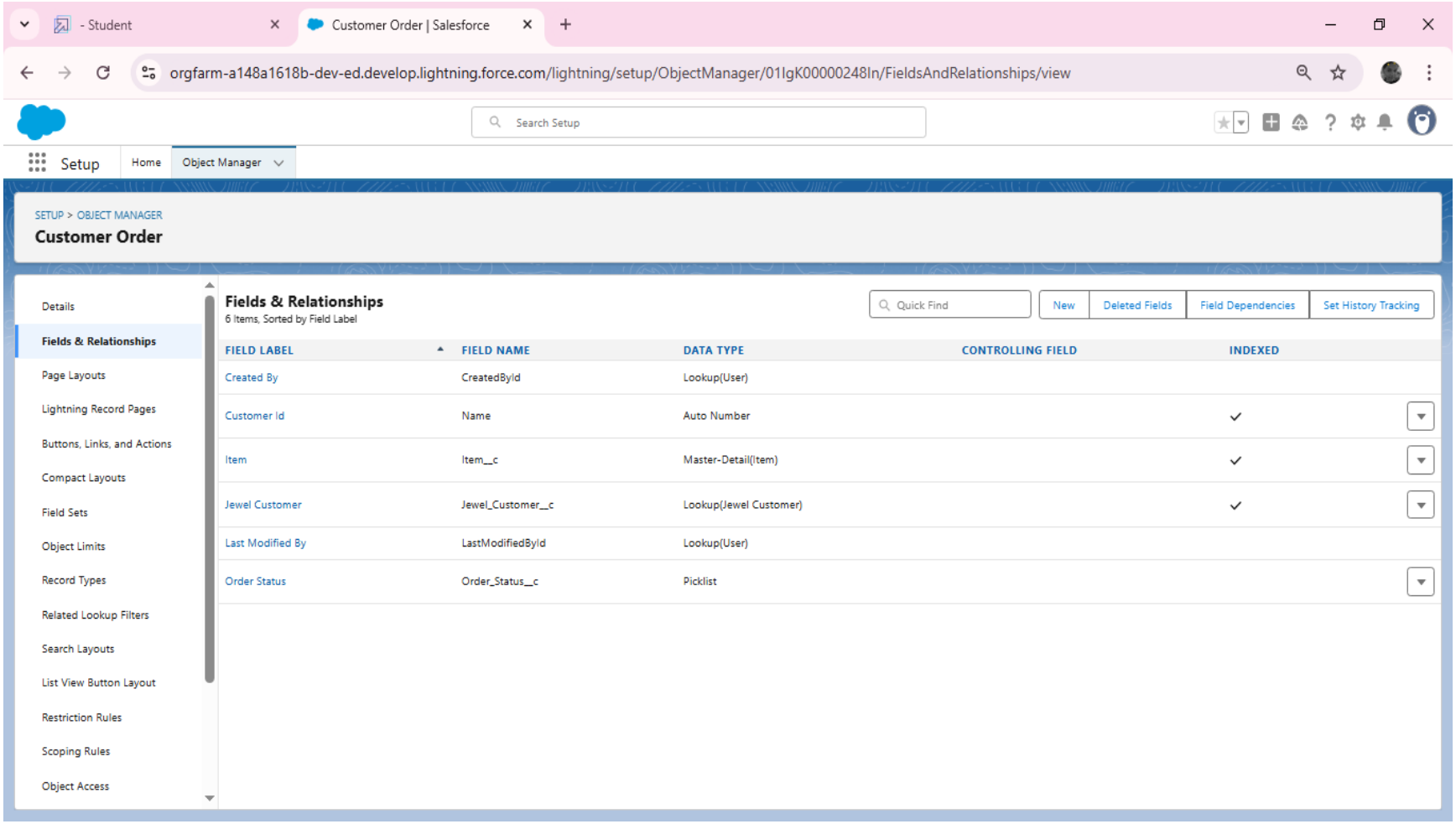


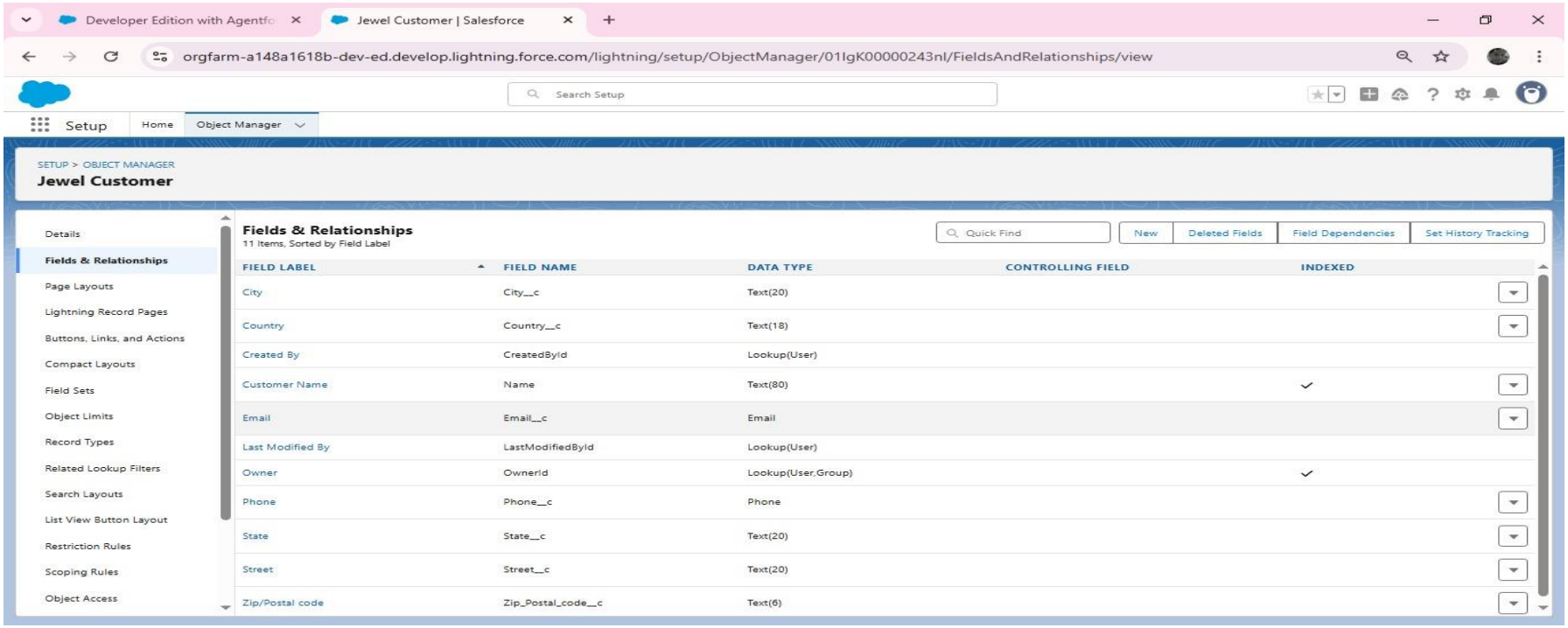


- Create a Lightning App



- Create Relationships and Fields in Objects




Developer Edition with Agentfo
Jewel Customer | Salesforce
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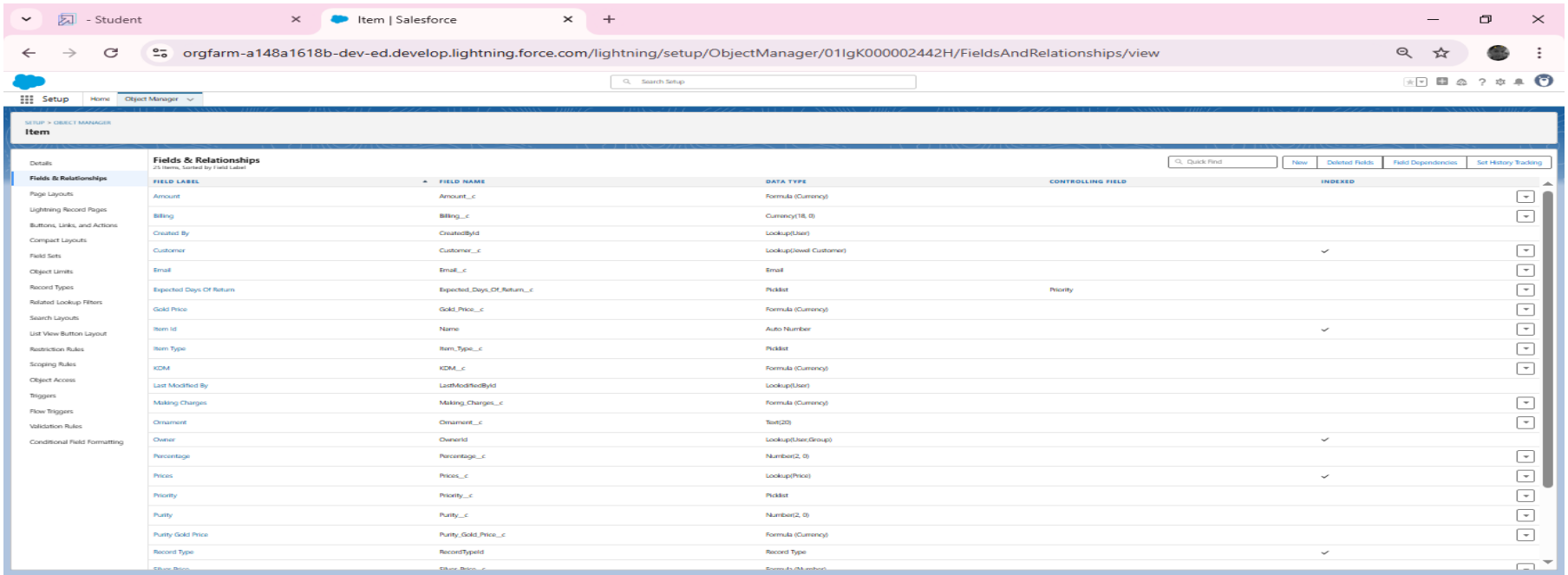
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Jewel Customer
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Fields & Relationships
11 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
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)


- Student
Item | Salesforce
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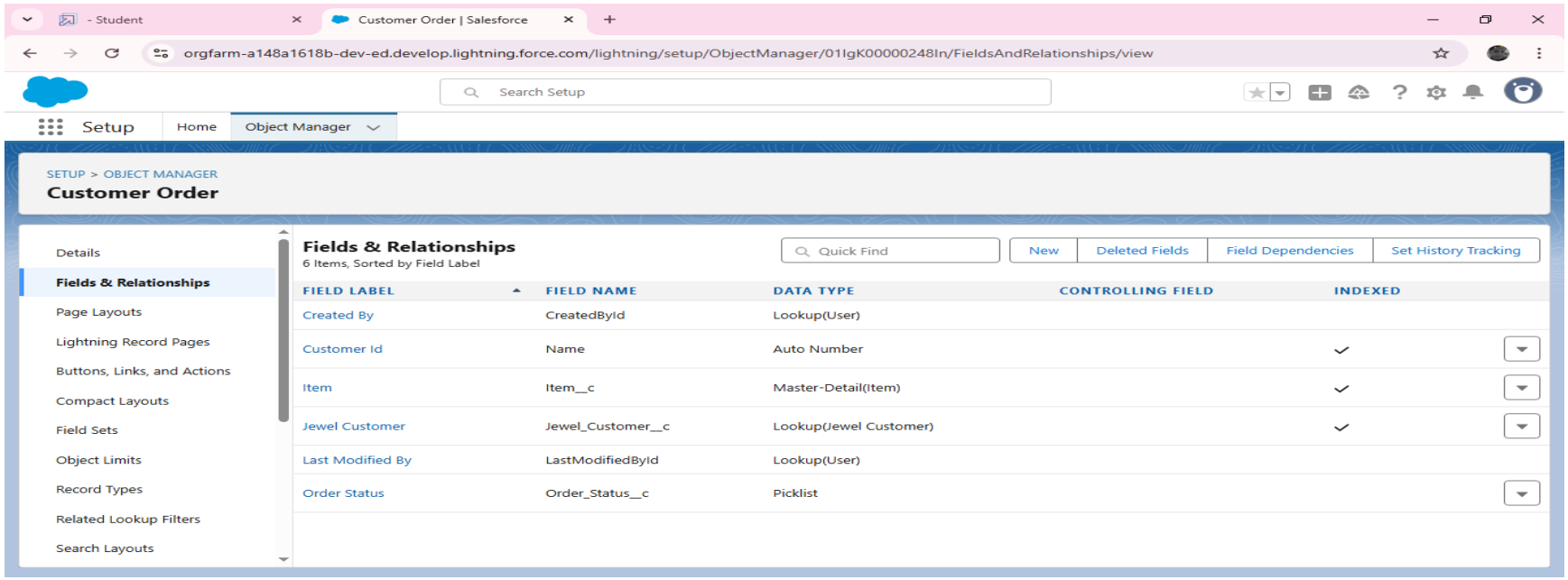
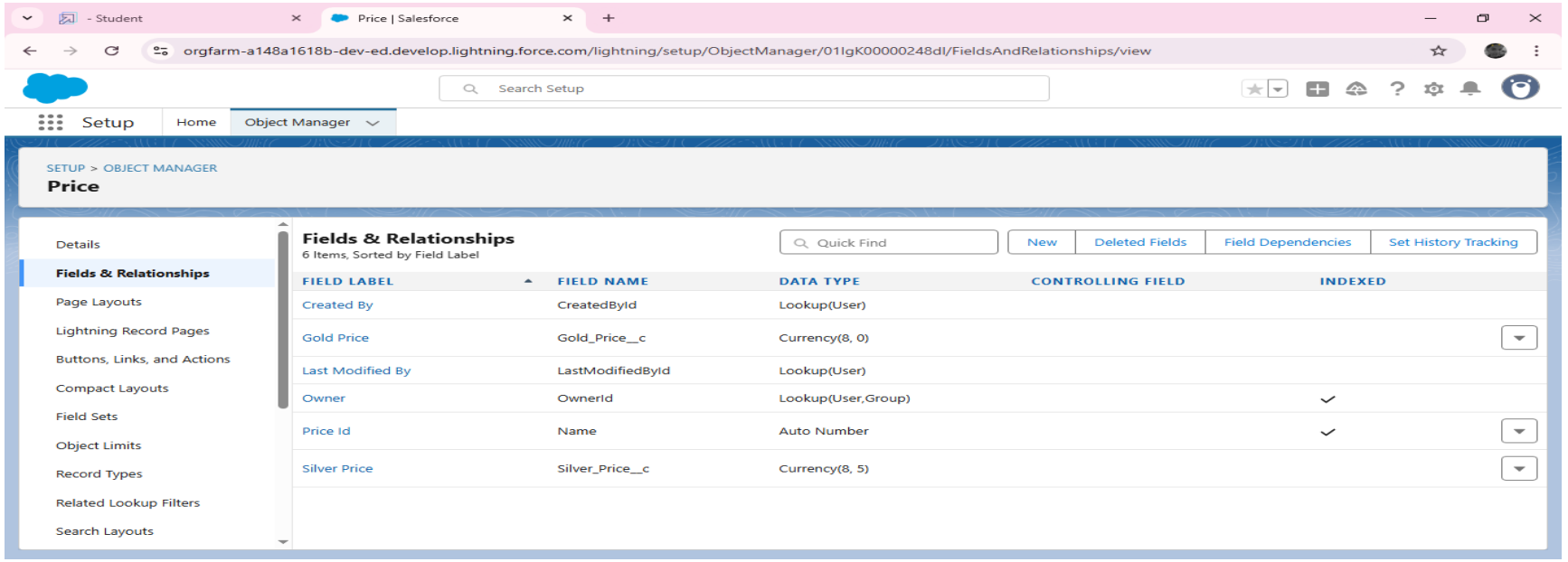
Setup
Item
Fields & Relationships
25 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Amount
Amount__c
Formula (Currency)
Billing
Billing__c
Currency(18, 0)
Created By
CreatedById
Lookup(User)
Customer
Customer__c
Lookup(Jewell Customer)
Email
Email__c
Email
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)
Owner
OwnerId
Lookup(User,Group)
Percentage
Percentage__c
Number(2, 0)
Prices
Prices__c
Lookup(Price)
Priority
Priority__c
Picklist
Purity
Purity__c
Number(2, 0)
Purity Gold Price
Purity_Gold_Price__c
Formula (Currency)
Record Type
RecordTypeId
Record Type


- Student
Customer Order | Salesforce
orgfarm-a148a1618b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK00000248In/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
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
Fields & Relationships
6 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
Customer Id
Name
Auto Number
Item
Item__c
Master-Detail(Item)
Jewel Customer
Jewel_Customer__c
Lookup(Jewel Customer)
Last Modified By
LastModifiedById
Lookup(User)
Order Status
Order_Status__c
Picklist


- Student
Price | Salesforce
orgfarm-a148a1618b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK00000248dI/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Price
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
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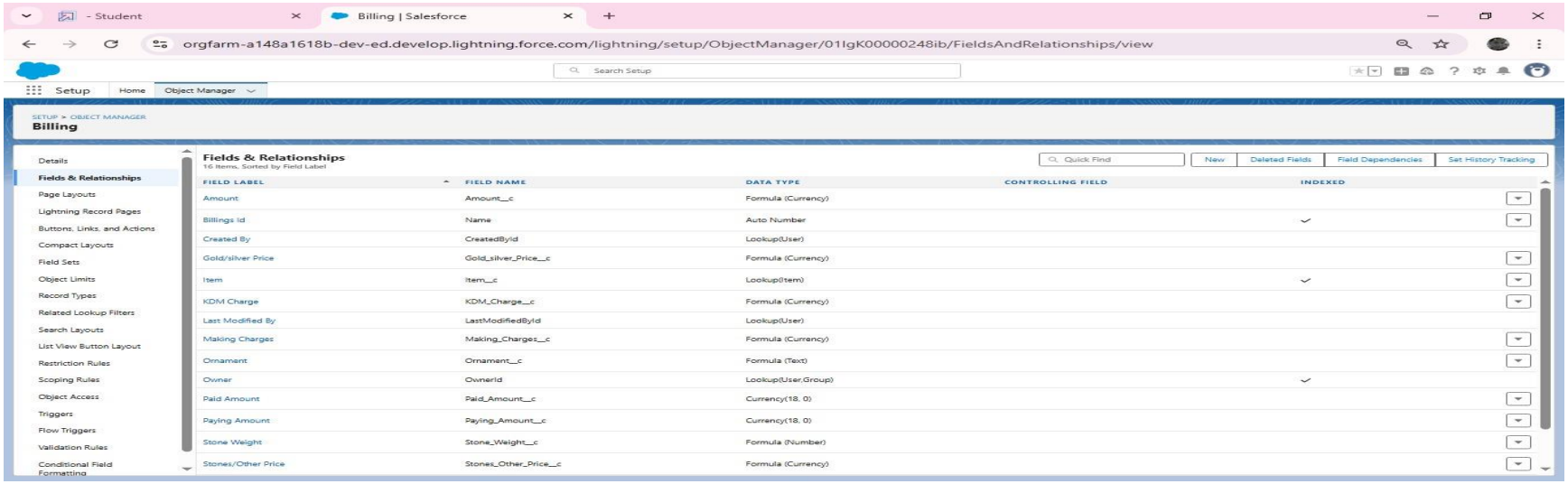
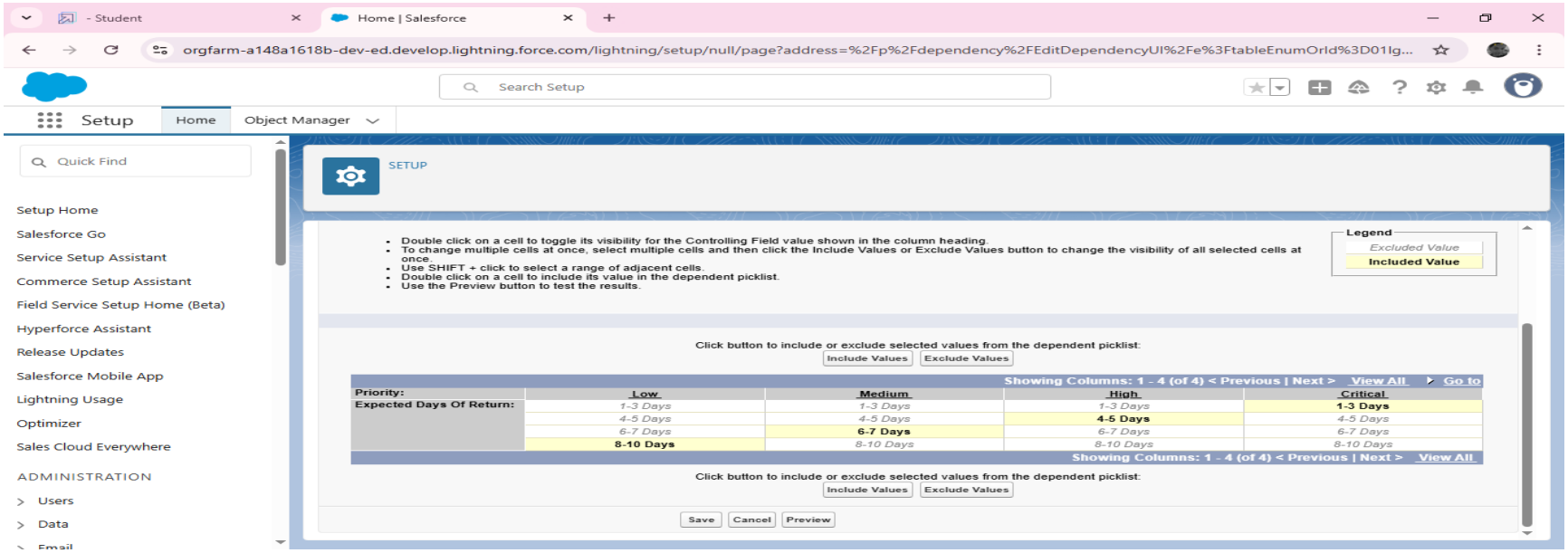
Fields & Relationships
6 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
Gold Price
Gold_Price__c
Currency(8, 0)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
Price Id
Name
Auto Number
Silver Price
Silver_Price__c
Currency(8, 5)



- Create the Field Dependencies



•Creating a Trigger

Developer Console - Google Chrome

orgfarm-a148a1618b-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help

UpdatePaidAmountTriggerHandler.apxc | UpdatePaidAmountTrigger.apxt

Code Coverage: None | API Version: 64 | Go To

```
1  public class UpdatePaidAmountTriggerHandler {
2
3      public static void handleBeforeInsert(List<Billing__c> newBillings) {
4
5          for (Billing__c billing : newBillings) {
6
7              billing.Paid_Amount__c = billing.Paying_Amount__c;
8
9          }
10
11     }
12
13
14
15     public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap, List<Billing__c> updatedBillings) {
16
```

Logs | Tests | Checkpoints | Query Editor | View State | Progress | Problems

User	Application	Operation	Time	Status	Read	Size

Filter | Click here to filter the log list

Developer Console - Google Chrome

orgfarm-a148a1618b-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help

UpdatePaidAmountTriggerHandler.apxc | UpdatePaidAmountTrigger.apxt

Code Coverage: None | API Version: 64 | Go To

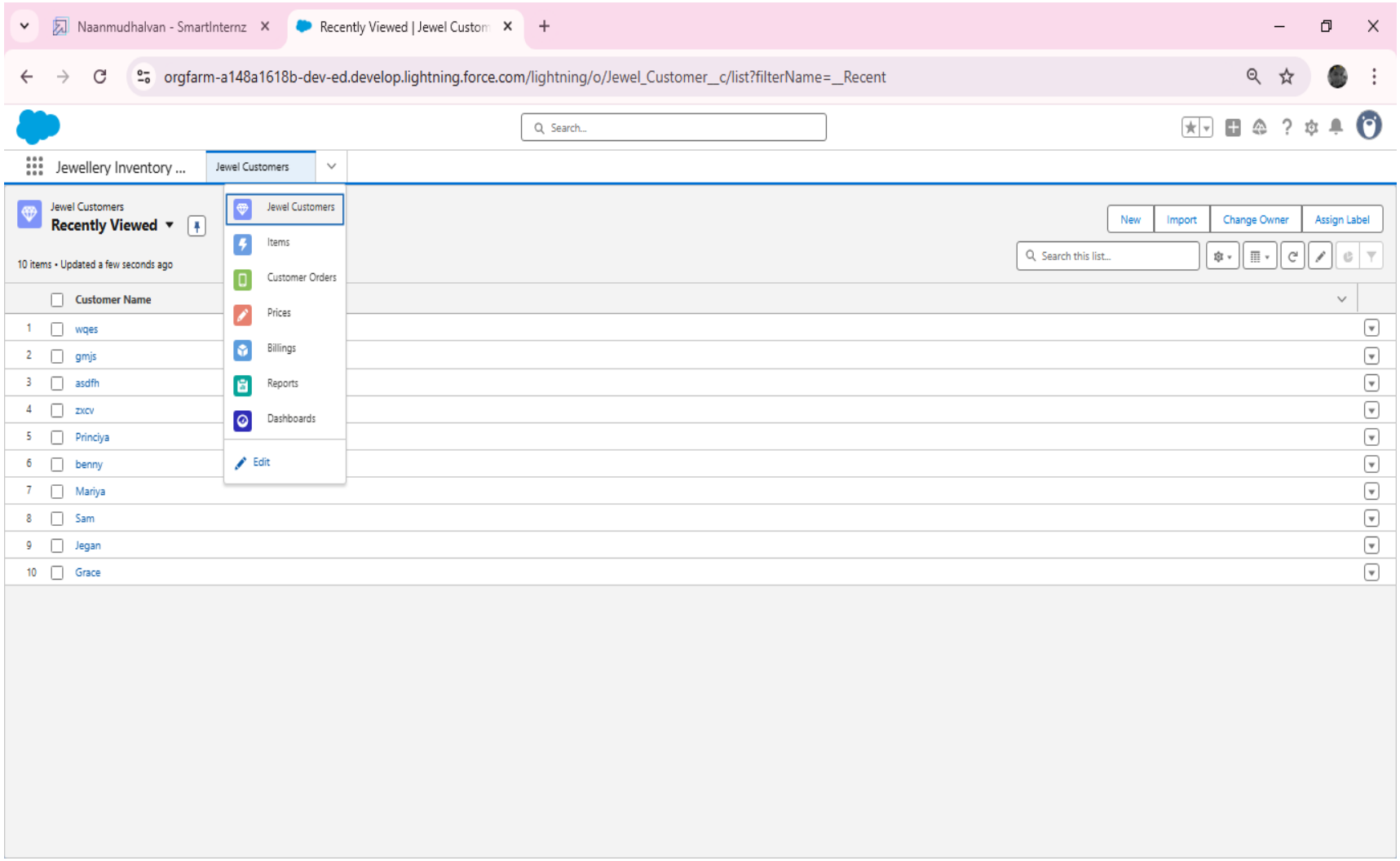
```
1  trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {
2
3      if (Trigger.isInsert) {
4
5          UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);
6
7      } else if (Trigger.isUpdate) {
8
9          UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap, Trigger.new);
10
11     }
12
13 }
```

Logs | Tests | Checkpoints | Query Editor | View State | Progress | Problems

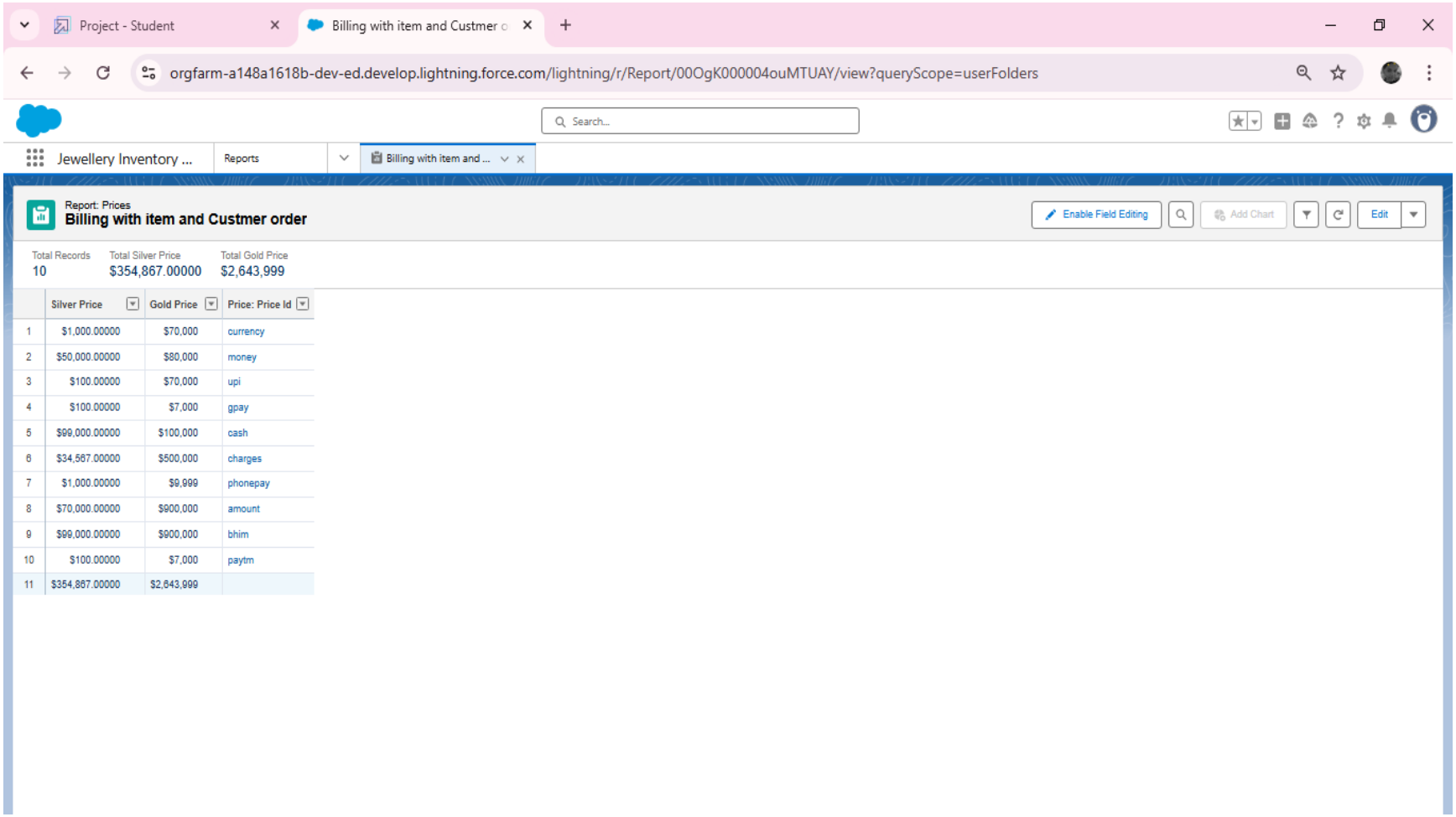
User	Application	Operation	Time	Status	Read	Size

Filter | Click here to filter the log list

•Create ,View ,Delete a Record in Jewel Customer

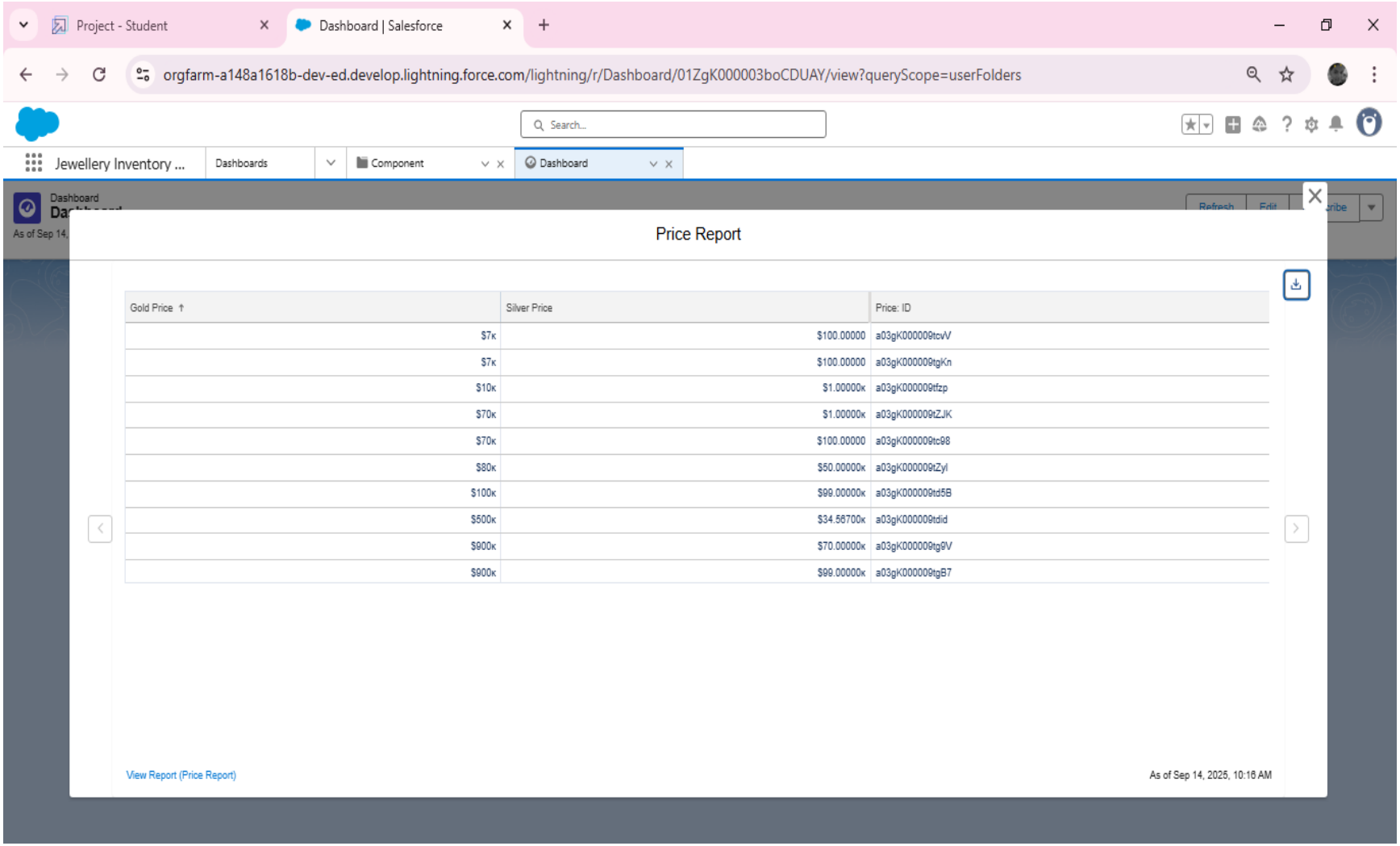


- Create a Reports



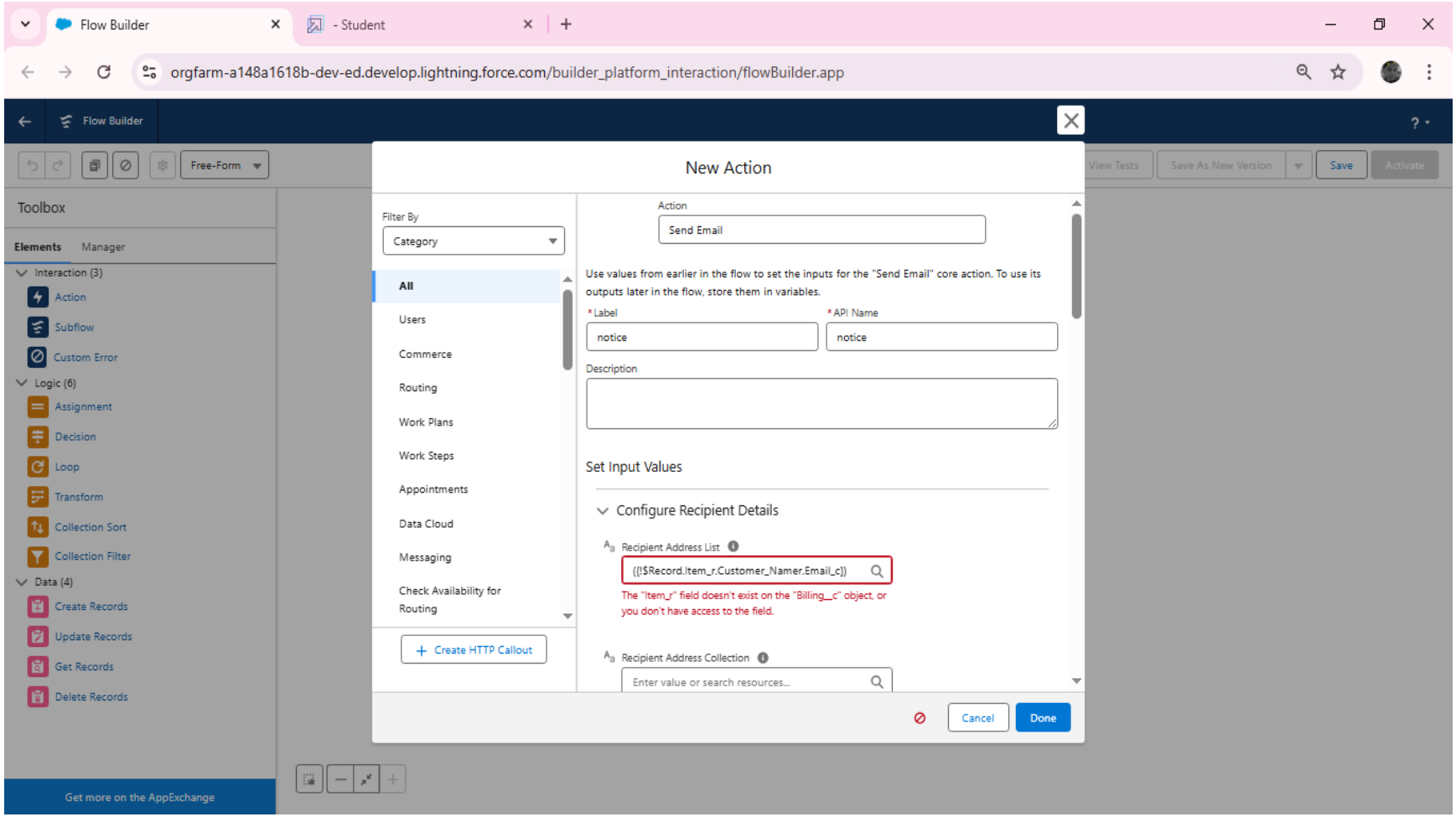
	Silver Price	Gold Price	Price: Price Id
1	$1,000.00000	$70,000	currency
2	$50,000.00000	$80,000	money
3	$100.00000	$70,000	upi
4	$100.00000	$7,000	gpay
5	$99,000.00000	$100,000	cash
6	$34,567.00000	$500,000	charges
7	$1,000.00000	$9,999	phonepay
8	$70,000.00000	$900,000	amount
9	$99,000.00000	$900,000	bhim
10	$100.00000	$7,000	paytm
11	$354,867.00000	$2,643,999	

- Create a Dashboard



•Create a Flow

The flow label name is not given so you can't activate the flow, and the recipient address list formula is wrong so you can't move to the next step.



•Conclusion

1.Update paid amount trigger handler

```
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;

        }

    }

}
```

2.Update Paid Amount Trigger

```
trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {
    if (Trigger.isInsert) {
        UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);
    } else if (Trigger.isUpdate) {
        UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap, Trigger.new);
    }
}
```