**Final Report**

**Title:** Final Project Documentation – Salesforce Jewel Management System

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## 📌 Project Overview

**Project Name:**
**Jewel Management System**

**Platform:**
Salesforce Lightning Experience (Cloud CRM)

**Project Objective:**
To build an efficient, scalable, and user-friendly jewelry inventory and billing system using Salesforce's no-code and low-code features.

**Target Users:**

- Jewelry store owners (GoldSmiths)

- Store admins and sales staff

**Duration:**
7–9 working days

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## 🧱 System Architecture Summary

- Custom Objects:

    o Jewel Customer

    o Item (with Item Type: Gold or Silver)

    o Customer Order

    o Price

    o Billing

- Automation:

    o Record-triggered Salesforce Flow to send emails upon Billing creation

    o Field dependencies for dynamic UI in page layouts

- Reports & Dashboards:

    o Summary reports: Gold/Silver item distribution, order totals

    o Visual dashboards: Pie charts, bar graphs, top customers

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💡 **Key Features Implemented**

| Feature | Description |
|---|---|
| Custom Page Layouts | Different layouts for Gold and Silver Items |
| Validation Rules | Prevent saving records with missing or invalid data |
| Field Dependencies | Dynamic form control (e.g., show Expected Return Days based on Priority) |
| Record-Triggered Flows | Auto-send email to customer with billing and item details |
| CRUD Operations | Full create, view, edit, delete for all major entities |
| Reports | Items with Billings, Customer Orders, Revenue reports |
| Dashboards | Sales trends, customer activity, revenue insights |

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📧 **Email Flow Logic**

**Flow Type:**
Record-triggered (when a Billing record is created or updated)

**Steps:**

1. Triggered on Billing creation

2. Fetches:

- o    Customer Name

- o    Item Type

- o    Ornament

- o    Weight

- o    Total Amount

3.  Composes a personalized email using a Text Template

4.  Sends it to the customer's email address

**Example Email Body:**

Hello,

Customer Name: Rajesh Kumar

Here are the details for the item you purchased with Jewelry Inventory System:

Item Type: Gold

Ornament: Necklace

Weight: 15 grams

Amount: ₹75,000

Thank you for your purchase!

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## 📊 Sample Reports and Dashboards

| Report Name | Purpose |
| --- | --- |
| Gold vs Silver Inventory Report | Compare quantities and weights in stock |
| Billing Summary by Customer | Total amount billed per customer |
| Top 5 Items Ordered | List of most popular ornaments |
| Orders with Price and Billing | Combined view for cross-verification |
| Dashboard Name | Charts Included |

| | |
|---|---|
| Inventory Overview | Pie chart (Gold vs Silver), Bar chart (Weight) |
| Revenue Dashboard | Line chart (monthly billing), Table (Top spenders) |

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## ✅ Project Impact

- Reduced manual errors in billing and record-keeping

- Improved response time with automatic customer updates

- Better inventory visibility for business decisions

- Time-saving for store owners and staff

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## 📁 Additional Assets

| Document | Purpose |
|---|---|
| Project Planning Template | Gantt-style breakdown of each project phase |
| Final Report | Summary of features, architecture, and results |
| Flow Configuration Guide | Step-by-step setup of the Salesforce flow |
| User Manual | How to use the app: creating orders, viewing reports, etc. |