

Project Title: CRM

JEWELLERY

College: -

**Sri Shankarananda Giri Swamy Degree
College**

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(1) Project Overview:

A "CRM Jewellery Project" aims to develop a dedicated Customer Relationship Management (CRM) system specifically designed for a jewelry business,

enabling them to effectively manage customer interactions, track purchase history, personalize marketing campaigns, and ultimately improve customer loyalty and sales by providing a centralized platform to access and analyze customer data across all touchpoints within the jewelry buying journey.

- 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 CRM is to gather consumer information and use it to enhance their experience. By connecting all channels onto a single platform, CRM helps companies personalize their products and services, including personalized marketing messages.

A CRM system helps businesses keep customer contact details up to date, track every customer interaction and manage customer accounts. It's also designed to help businesses improve customer relationships and Customer Lifetime Value (CLV)

(2) Objectives :

Business Goals:

The fundamental purpose of a CRM system is to improve the customer experience. Executing on this objective is the most sure-fire way to see positive results across your business. When you make improved customer

satisfaction the main goal for your CRM, all other objectives work to support this goal.

The ultimate goal of customer relationship management and associated CRM systems is to efficiently manage and improve business relationships. There are stages in creating and leveraging customer relationships that break down the entire relationship life cycle into phases with distinct goals.

The 4 main objectives of a CRM

- Centralizes information. One of the main objectives of a CRM is to centralize all customer-related information in a single, accessible system. ...
- Increases customer retention. ...
- Increases sales. ...
- Reduces costs.

Specific outcomes:

When adapting a CRM project to the specific needs of a "CRM Jewel" project (assuming this refers to a business within the jewelry industry), there are unique considerations that will influence the specific outcomes and key deliveries.

(3) Salesforce Key Features and Concepts Utilized:

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**

Schema Builder is a powerful tool within Salesforce that allows you to visualise, explore, and design the relationships between objects in your Salesforce organisation. It provides a graphical representation of the data model, making it easier to understand the structure and connections between different objects

↔ We Entered Objects as :-

- Jewel Customer
- Items
- Customer Order
- Prices
- Billing in schema Builders

♥ **Field Dependencies:-**

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 :**

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

♥ **Profiles :**

We Created 2 Profiles :

- ✓ Gold Smith Profile
- ✓ Worker Profiile

♥ **Roles :**

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organisation can have to data.

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

♥ **Users:**

Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

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

♥ **Page Layouts:**

Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

Created 2 Page layouts in Item object named as:-

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

♥ **Record Type:**

Record types allow administrators to create a different page layout with custom picklist fields and values for the same business process and various business processes.

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

♥ **Permission sets:**

A standard permission set consists of a group of common permissions for a particular feature associated with a permission set license.

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:**

In Jewelry Inventory System we created Jewel Customers under Jewel Customer Tab.

We created some Records under “ Item, Prices, Customer orders & Billing”.

♥ Reports:

By using Reports, we can examine our 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 Setup interface showing the Fields & Relationships section for the 'Item' object.

Fields & Relationships (23 items, Sorted by Field Label)

Field Label	Field Name	Type
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

Screenshot of the Salesforce Setup interface showing the Fields & Relationships section for the 'Jewel Customer' object.

Fields & Relationships (11 items, Sorted by Field Label)

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)		

Billing

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		✓
Billing Name	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)		✓

We used 2 Profiles :

* Gold Smith Profile

* Worker Profile

Profiles

Profile Edit

Worker

Set the permissions and page layouts for this profile.

Profile Edit

Name	Worker	Save	Save & New	Cancel
User License	Salesforce Platform	Custom Profile <input checked="" type="checkbox"/>		
Description				

Custom App Settings

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

Setup Home Object Manager

Search Setup

Profiles

Gold Smith

Name: Gold Smith

User License: Salesforce

Description:

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 type="checkbox"/>	<input type="radio"/>		Sales (standard__Sales)	<input type="checkbox"/>	<input type="radio"/>

30°C Sunny

Search

ENG IN 12:36 25-02-2025

Lightening App:

Jewel Customers Recently Viewed

Customer name

1 Maha

2 Gowri

New Import Change Owner Assign Label

Search this list...

26°C Haze

Search

ENG IN 10:55 28-02-2025

Roles:

The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. The left sidebar shows navigation options like 'Users', 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main content area displays the details for the 'Gold Smith' role, including its label ('Gold Smith'), reporting to 'Installation & Repair Services', modified by 'Mahabub bee Team' on 21/02/2025, 6:32 pm, and opportunities and cases access levels. Below this is a table titled 'Users in Gold Smith Role' showing one user: 'Niklaus Mikaelson' (nmika, niku@apsche.com). A link to 'Users in Gold Smith Role Help' is also present.

The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. The left sidebar shows navigation options like 'Users', 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main content area displays a hierarchical list of roles under 'SVP.Customer Service & Support': COO, SVP.Customer Service & Support, Customer Support, International, Customer Support, North America, Installation & Repair Services, Gold Smith, Worker, SVP.Human Resources, SVP.Sales & Marketing, VP.International Sales, and VP.Marketing. Each role has 'Edit', 'Del', and 'Assign' buttons next to it. A link to 'Users in Gold Smith Role Help' is also present.

Users:

- *Niklaus Mikaelson*
- *Kol Mikaelson*

We Created 2 Page layouts: Page Layout for Gold & Silver

Page Layout for Silver

Section	Customer Name	Item Type	Ornament	Priority	Silver Price	Weight
Blank Space	Expected Days Of ...	KDM	Owner	Purity	Stone/Other Price	
Amount	Gold Price	Last Modified By	Percentage	Purity Gold Price	Stone Weight	
Created By	Item Id	Making Charges	Prices	Record Type	Total Weight	

Information (Header visible on edit only)

Item Id	GEN-2004-001234	Owner	Sample Text
Item Type	Sample Text		
Prices	Sample Text		
Gold Price	€123.45		
Customer Name	Sample Text		
Ornament	Sample Text		
Weight	0.19031		
Stone Weight	0.23032		
Percentage	49		
Stone/Other Price	€123.45		
Expected Days Of Return	Sample Text		

We created 3 Reports:

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

Sales| Projects| New | R | minin...| One| Micro| Docs| Team| CRM| CRM| featur...| Smart| Smart| +

ssgsdegreecollege39-dev-ed.develop.lightning.force.com/lightning/r/Report/00OdM00000AR3IPUAT/edit?queryScope=userFolders

Jewellery Inventory ... Reports Report Built... Report Built... Item-07 | It... Samatha | J... Gowri | Jew... More

REPORT Prices Report Prices

Outline Filters 1 Previewing a limited number of records. Run the report to see everything.

Groups GROUP ROWS Add group... Price: Price Gold Price Silver Price

	Price: Price	Gold Price	Silver Price
1	Price-03	₹123.45000	₹123.45000
2	Price-04	-	₹123.45000
3		₹123.45000	₹246.90000

Columns Add column... Price: Price # Gold Price # Silver Price

33°C sunny ENG IN 13:29 25-02-2025

Salesforce A... APSCHE SmartInternz Billings.with... Billing | Sale... Google Pass... Document 1 +

ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/r/Report/00OQy00000CZGURMAS5/view?queryScope=userFolders

Jewellery Inventory ... Reports Maha | ... Price-0... Item-01... Custom... Billing-... Item-02... Gowri | ... Billings ... More

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																																																																				
<table border="1"> <thead> <tr> <th>Item: Item Type</th> <th>Billing: Billing Name</th> <th>Item: Item Id</th> <th>Amount</th> <th>Ornament</th> <th>Total Amount</th> <th>KDM Charge</th> <th>Making Charges</th> <th>Stones/Other Price</th> <th>Stone Weight</th> </tr> </thead> <tbody> <tr> <td rowspan="2">Gold (2)</td> <td>Billing-01</td> <td>Item-01</td> <td>₹3,20,000.00</td> <td>Necklace</td> <td>₹3,77,000</td> <td>₹32,000</td> <td>₹15,000.00</td> <td>₹10,000.00</td> <td>10.00</td> </tr> <tr> <td>Billing-02</td> <td>Item-02</td> <td>₹4,00,000.00</td> <td>Necklace</td> <td>₹5,18,000</td> <td>₹80,000</td> <td>₹18,000.00</td> <td>₹20,000.00</td> <td>10.00</td> </tr> <tr> <td>Subtotal</td> <td></td> <td></td> <td>₹7,20,000.00</td> <td></td> <td>₹8,95,000</td> <td>₹1,12,000</td> <td>₹33,000.00</td> <td>₹30,000.00</td> <td>20.00</td> </tr> <tr> <td rowspan="2">Silver (1)</td> <td>Billing-05</td> <td>Item-03</td> <td>₹5,600.00</td> <td>Necklace</td> <td>₹17,160</td> <td>₹560</td> <td>₹1,000.00</td> <td>₹10,000.00</td> <td>20.00</td> </tr> <tr> <td>Subtotal</td> <td></td> <td>₹5,600.00</td> <td></td> <td>₹17,160</td> <td>₹560</td> <td>₹1,000.00</td> <td>₹10,000.00</td> <td>20.00</td> </tr> <tr> <td>Total (3)</td> <td></td> <td></td> <td>₹7,25,600.00</td> <td></td> <td>₹9,12,160</td> <td>₹1,12,560</td> <td>₹34,000.00</td> <td>₹40,000.00</td> <td>40.00</td> </tr> </tbody> </table>							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	₹1,12,000	₹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	Subtotal		₹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
Item: Item Type	Billing: Billing Name	Item: Item Id	Amount	Ornament	Total Amount	KDM Charge	Making Charges	Stones/Other Price	Stone Weight																																																																	
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Row Counts Detail Rows Subtotals Grand Total

26°C Haze ENG IN 11:05 28-02-2025

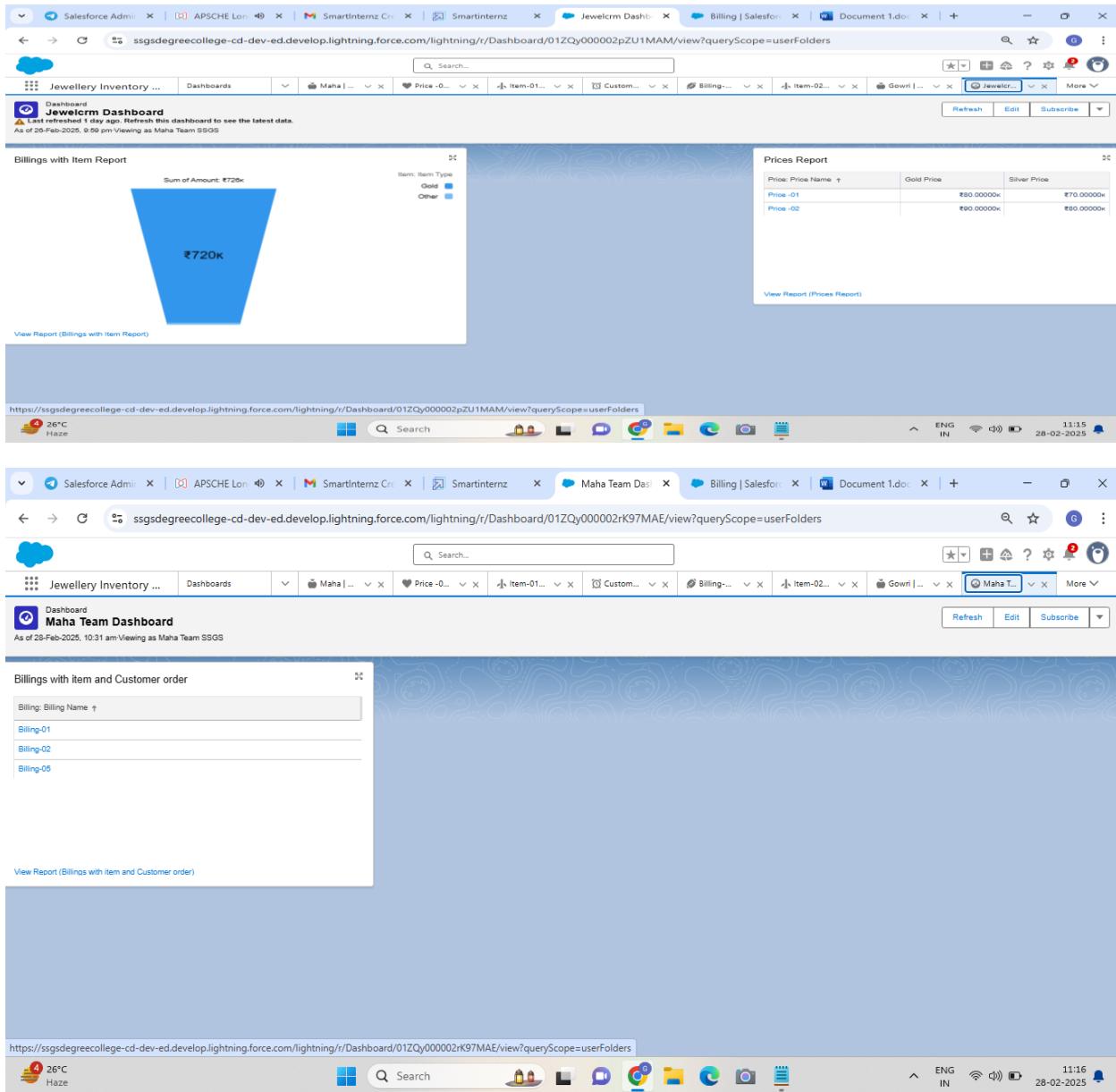
The screenshot shows a Salesforce Lightning interface with a report titled "Billings with item and Customer order". The report displays three records, each with a Billing Name: "Billing-01", "Billing-02", and "Billing-05". The interface includes a toolbar with various icons and a status bar at the bottom showing weather (26°C Haze), system status, and date (28-02-2025).

Billing Name
Billing-01
Billing-02
Billing-05

Dashboards:

The screenshot shows a Salesforce Lightning interface with a dashboard list page. It displays two recent dashboards: "Jewelcrm Dashboard" and "Maha Team Dashboard". The left sidebar contains navigation links for Dashboards, Recent, DASHBOARDS (Recent, Created by Me, Private Dashboards, All Dashboards), FOLDERS (All Folders, Created by Me, Shared with Me), and FAVORITES (All Favorites). The interface includes a toolbar with various icons and a status bar at the bottom showing weather (26°C Haze), system status, and date (28-02-2025).

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Jewelcrm Dashboard		Private Dashboards	Maha Team SSGS	26/2/2025, 9:40 pm	
Maha Team Dashboard		Private Dashboards	Maha Team SSGS	28/2/2025, 10:30 am	



Validation Rules:

Created Validation Rules under Jewel Customer & Items

Item Validation Rule

Rule Name	ValidationRule_For_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))	<input checked="" type="checkbox"/>
Error Message	"Please fill Required fields"	Error Location Top of Page
Description		
Created By	Maha Team SSGS, 26/02/2025, 2:28 pm	Modified By Maha Team SSGS, 28/02/2025, 12:51 pm

Jewel Customer Validation Rule

Rule Name	Postal_Code	Active
Error Condition Formula	AND(OR(LEN(Zip_Postal_code__c) <> 6, NOT(REGEX(Zip_Postal_code__c, "[0-9]{6}"))), NOT(ISBLANK(Zip_Postal_code__c)))	<input checked="" type="checkbox"/>
Error Message	"Must contain 6 digits"	Error Location Zip/Postal code
Description		
Created By	Maha Team SSGS, 26/02/2025, 2:24 pm	Modified By Maha Team SSGS, 03/03/2025, 11:49 am

The screenshot shows the 'Validation Rules' section for the 'Jewel Customer' object in the Salesforce Setup. The page lists two validation rules:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Postal_Code	Zip/Postal code	"Must contain 6 digits"	✓	Maha Team SSGS, 26/02/2025, 2:24 pm
ValidationRule_For_JewelCustomerObject	Top of Page	"Please fill Required fields".	✓	Maha Team SSGS, 26/02/2025, 2:26 pm

The left sidebar contains links for 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, and Object Access.

The screenshot shows the 'Validation Rules' section for the 'Item' object in the Salesforce Setup. The page lists one validation rule:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
ValidationRule_For_Item	Top of Page	"Please fill Required fields".	✓	Maha Team SSGS, 28/02/2025, 12:51 pm

The left sidebar contains links for 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.

A Snipping Tool window is open in the foreground, showing a message: "Screenshot copied to clipboard" and "Automatically saved to screenshots folder".

The screenshot shows the 'Jewel Customer' object setup page in the Object Manager. The 'Validation Rule Detail' section is displayed, showing a validation rule named 'ValidationRule_For_JewelCustomerObject'. The rule is active and has an error message: 'Please fill Required fields'. The validation formula is: OR(ISBLANK(City__c), ISBLANK(Country__c), ISBLANK(Phone__c), ISBLANK(State__c), ISBLANK(Street__c)). The rule was created by 'Maha Team SSSG' on 28/02/2025 at 2:26 pm and modified by the same user on the same date and time.

Jewel Customer Validation Rule

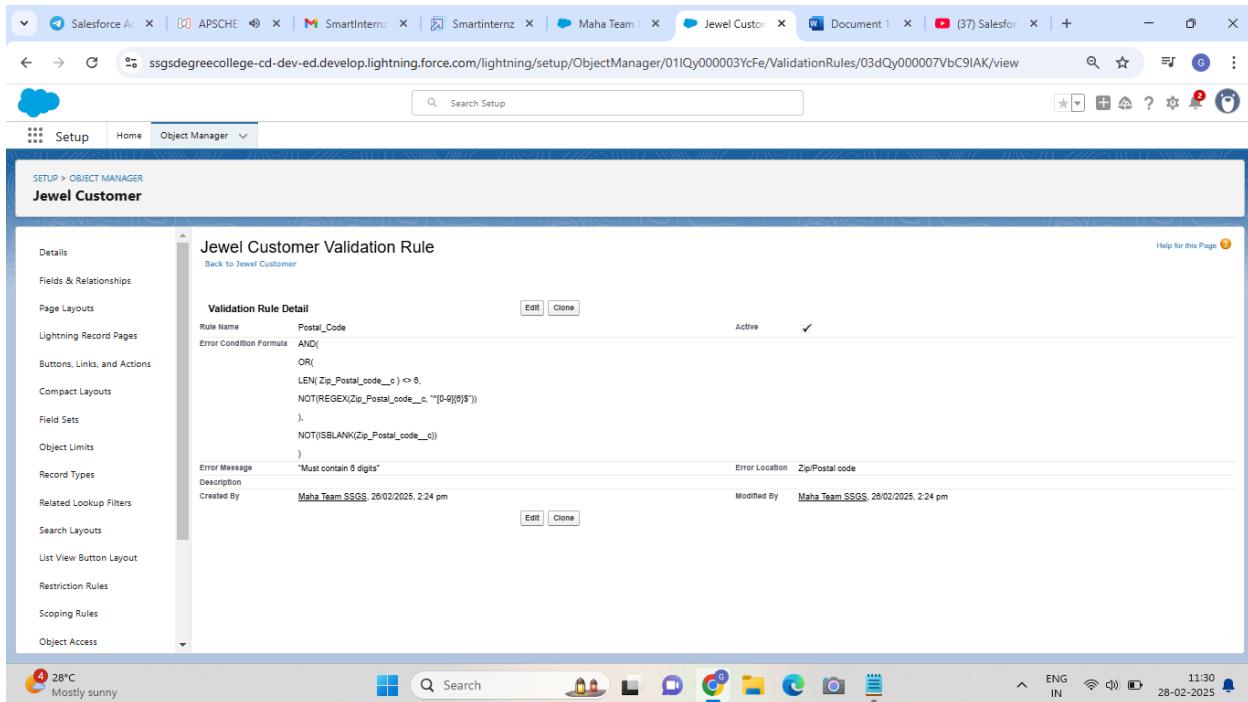
Validation Rule Detail

Rule Name: ValidationRule_For_JewelCustomerObject
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: Maha Team SSSG, 28/02/2025, 2:26 pm
Modified By: Maha Team SSSG, 28/02/2025, 2:26 pm

Item Validation Rule

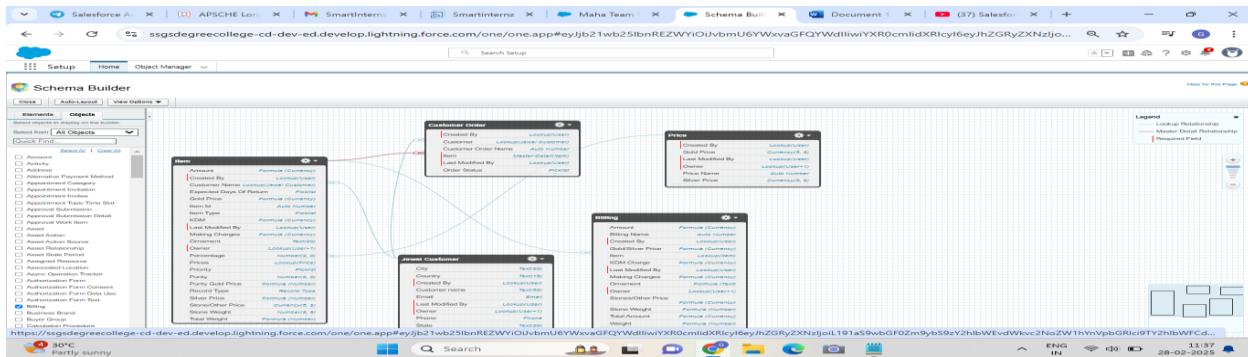
Validation Rule Detail

Rule Name: ValidationRule_For_Item
Error Condition Formula: OR(ISBLANK(Ornament__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_Prod__c), ISBLANK(Stone_Weight__c), ISBLANK(Vring__c))
Error Message: "Please fill Required fields."
Description: Created By: Maha Team SSSG, 28/02/2025, 2:28 pm
Modified By: Maha Team SSSG, 28/02/2025, 2:28 pm



Schema Builder:

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



Field Dependencies:

We created Field Dependencies under Item objects

The image contains two screenshots of the Salesforce Setup interface.

Screenshot 1: Edit Field Dependency

This screenshot shows the "Edit Field Dependency" page under the "Setup" menu. It displays a grid for defining dependencies between fields. The columns are "Controlling Field" (Priority), "Dependent Field" (Expected Days Of Return), and "Instructions". A legend indicates that grey cells represent "Included Value" and yellow cells represent "Included Value". The "Priority" column has rows: Low (1-2 Days, 2-3 Days, 3-7 Days, 5-10 Days). The "Expected Days Of Return" column has rows: Medium (4-6 Days, 6-7 Days, 8-10 Days) and High (1-2 Days, 2-3 Days, 3-7 Days, 5-10 Days). Buttons at the bottom include "Save", "Cancel", and "Preview".

Screenshot 2: Item Field Dependencies

This screenshot shows the "Item Field Dependencies" page under the "Object Manager" section of the "Setup" menu. It lists a single dependency entry:

Action	Controlling Field	Dependent Field	Modified By
Edit	Priority	Expected Days Of Return	Maha Team SSSS, 26/02/2025, 4:30 pm

The sidebar on the left shows various setup categories like "Fields & Relationships", "Page Layouts", and "Buttons, Links, and Actions". The status bar at the bottom shows "30°C Partly sunny" and the date "28-02-2025".

Tabs:

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

Screenshot of a web browser showing the Salesforce Setup interface for managing Custom Tabs.

The browser tabs include:

- Document 1.docx
- Smartinternz
- Maha Team Dashboard | Salesforce
- Tabs | Salesforce

The URL in the address bar is: ssgsdegreecollege-cd-dev-ed-develop.lightning.force.com/lightning/setup/CustomTabs/home

The page title is "Custom Tabs".

Left sidebar navigation:

- Setup
- Home
- Object Manager

Search bar: Search Setup

Content area:

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs:

Action	Label	Tab Style	Description
Edit Del	Billing	Balls	
Edit Del	Customer Orders	Alarm clock	
Edit Del	Items	Airplane	
Edit Del	Jewel Customers	Apple	
Edit Del	Prices	Heart	

Web Tabs:

No Web Tabs have been defined.

Visualforce Tabs:

No Visualforce Tabs have been defined.

Bottom navigation bar:

- Cloud icon with 4 notifications and 31°C Partly sunny
- Search bar
- Icons for Home, Recent, My Profile, Help, and Logout
- Language: ENG IN
- Date and time: 12:38 28-02-2025

Flows: We created flows

The image contains two screenshots of the Salesforce Lightning interface, both titled "Flows".

Screenshot 1: Flow Details

This screenshot shows the details of a specific flow named "Email Notification Flow". The flow is triggered by "Record-Triggered After Save Flow" and is currently "Activated". It was created on 26/02/2025 at 9:53 pm and last modified on the same day at 9:53 pm. The flow owner is "Maha Team SSGS". The flow label is "Email Notification Flow".

Flow Label	API Name
Email Notification Flow	Email_Notification_Flow

Screenshot 2: Recently Viewed Flows

This screenshot shows a list of recently viewed flows. There is one item listed: "Email Notification Flow", which is a "Record-Triggered After Save Flow" and is currently "Activated". It was last modified on 26/02/2025 at 9:53 pm by "MSSGS".

Flow Label	Flow Type	Progress Status	Associated Record	Description	Last Modified Date	Last Modified
Email Notification Flow	Record-Triggered After Save Flow	Activated			26/02/2025, 9:53 pm	MSSGS

(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 Salesforce Setup interface under the Object Manager. The left sidebar is collapsed, and the main area displays the 'Record Types' list. There are two items: 'Gold' and 'Silver'. The 'Gold' record type has a description of "'Gold items information'" and was created by 'Maha Team SSGS' on 26/02/2025, 6:09 pm. The 'Silver' record type has a description of 'Record for Silver' and was also created by 'Maha Team SSGS' on 26/02/2025, 6:11 pm.

This screenshot shows the detailed view for the 'Gold' record type. It includes fields for Record Type Label (Gold), Record Type Name (Gold), Namespace Prefix, Description ('Gold items information'), and Created By ('Maha Team SSGS, 26/02/2025, 6:09 pm'). The 'Modified By' field is also present. Below this, a section titled 'Picklists Available for Editing' lists four fields: Action, Field, Edit, Expected Days Of Return, Edit, Item Type, and Edit, Priority. The 'Modified Date' column shows 26/02/2025, 6:09 pm for all entries.

This screenshot shows the detailed view for the 'Silver' record type. It includes fields for Record Type Label (Silver), Record Type Name (Silver), Namespace Prefix, Description ('Record for Silver'), and Created By ('Maha Team SSGS, 26/02/2025, 6:11 pm'). The 'Modified By' field is also present. Below this, a section titled 'Picklists Available for Editing' lists four fields: Action, Field, Edit, Expected Days Of Return, Edit, Item Type, and Edit, Priority. The 'Modified Date' column shows 26/02/2025, 6:11 pm for all entries.

♥ 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 main window displays the 'Permission Set Overview' for the 'Per to Worker' permission set. Key details include:

- Description:** permission for worker
- API Name:** Per_to_Worker
- Namespace Prefix:** (empty)
- Created By:** Maha Team SSGS, 26/02/2025, 8:57 pm
- Last Modified By:** Maha Team SSGS, 26/02/2025, 8:58 pm

The 'Object Settings' tab is selected, showing the following configurations:

- Assigned Apps:** Settings that specify which apps are visible in the app menu.
- Assigned Connected Apps:** Settings that specify which connected apps are visible in the app menu.
- Object Settings:** Permissions to access objects and fields, and settings such as tab availability.
- App Permissions:** Permissions to perform app-specific actions, such as "Manage Call Centers".
- Apex Class Access:** Permissions to execute Apex classes.
- Visualforce Page Access:** Permissions to access Visualforce pages.

The sidebar on the left shows the navigation path: Users > Permission Sets. The bottom of the screen shows the Windows taskbar with various application icons and system status indicators.

♥ Profiles: -

We created 2 Profiles and given name as

❖ Gold Smith Profile

❖ Worker Profile

The screenshot shows the 'Profiles' setup page in Salesforce. The profile being edited is 'Gold Smith'. The 'Custom Profile' checkbox is checked. Under 'Custom App Settings', several standard and custom apps are listed with checkboxes for 'Visible' and 'Default'. The 'Salesforce' app is selected as the default. The 'Sales' app is also listed with its own set of checkboxes. The system bar at the bottom shows the date as 28-02-2025.

The screenshot shows the 'Profiles' setup page in Salesforce. The profile being edited is 'Worker'. Under 'Custom Object Permissions', various objects like 'Billings', 'Customer Orders', 'Items', 'Jewel Customers', and 'Prices' have their access levels (Read, Create, Edit, Delete, View All Records, Modify All Records, View All Fields) defined. Under 'Session Settings', session times out after 2 hours of inactivity. Under 'Password Policies', password expiration is set to 90 days, history is 3 passwords remembered, minimum length is 8 characters, complexity requires alpha and numeric characters, and the question requirement is 'Cannot contain password'. The system bar at the bottom shows the date as 28-02-2025.

Document 1.docx Maha Team Dashboard | Sales Profiles | Salesforce Smartinternz Smartinternz + - X

ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eQy00000C9RbZ%2Fe%3Fr?url%3D%252F00...

Cloud Setup Home Object Manager Search Setup

Profile Edit Worker Profile

Set the permissions and page layouts for this profile.

Profile Edit Save Save & New Cancel

Name Worker Profile User License Salesforce Platform Description Custom Profile ✓

Custom App Settings

Analytics Studio (standard__Insights) Visible Default Platform (standard__Platform) Visible Default

App Launcher (standard__AppLauncher) WDC (standard__Work)

Jewellery Inventory System (Jewellery_Inventory_System)

Service Provider Access

Tab Settings

Finance headline India reported 11... Search ENG IN 18:42 28-02-2025

This screenshot shows the 'Worker Profile' edit screen in the Salesforce Setup. The 'Custom App Settings' section is visible, showing checkboxes for Analytics Studio, App Launcher, and Jewellery Inventory System. The 'Service Provider Access' and 'Tab Settings' sections are also present. The top navigation bar includes links for Document 1.docx, Maha Team Dashboard, Sales, Profiles, Salesforce, Smartinternz, and Smartinternz.

Document 1.docx Maha Team Dashboard | Sales Profiles | Salesforce Smartinternz Smartinternz + - X

ssgsdegreecollege-cd-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eQy00000C9RbZ%2Fe%3Fr?url%3D%252F00...

Cloud Setup Home Object Manager Search Setup

Q profil

Users Profiles

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

Contact Point Emails User External Credentials

Custom Object Permissions

	Basic Access						Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields		
Billing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Customer Orders	<input checked="" type="checkbox"/>	<input type="checkbox"/>							
Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>							
Jewel Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Prices	<input checked="" type="checkbox"/>	<input 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
Password question requirement:	Cannot contain password
Maximum invalid login attempts:	10

Finance headline India reported 11... Search ENG IN 18:42 28-02-2025

This screenshot shows the 'Custom Object Permissions' and 'Session Settings' sections in the Salesforce Setup. The 'Custom Object Permissions' table lists various objects like Billing, Customer Orders, Items, Jewel Customers, and Prices with checkboxes for basic access and data administration. The 'Session Settings' section allows setting session timeout and security levels. The top navigation bar includes links for Document 1.docx, Maha Team Dashboard, Sales, Profiles, Salesforce, Smartinternz, and Smartinternz.

♥ Validation Rules: -

The screenshot shows the Salesforce Validation Rule Editor for an 'Item' object. The validation rule is named 'ValidationRule_For_Item' and is active. The formula is:

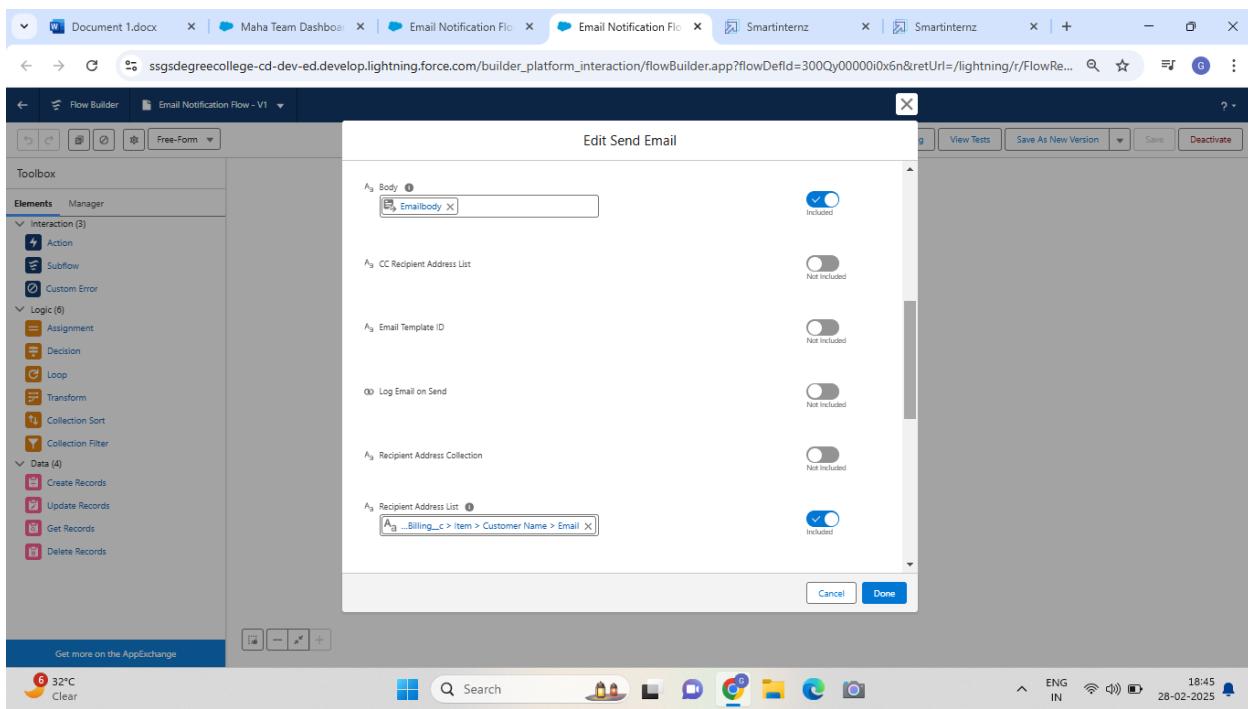
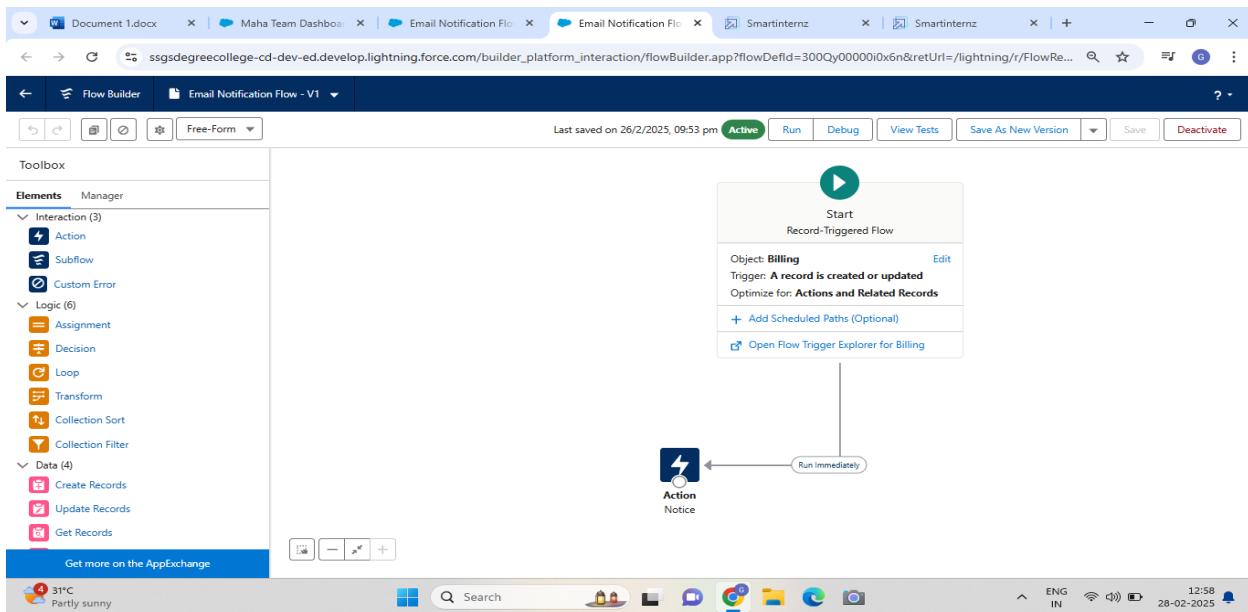
```
OR( ISBLANK( Amount_c ), ISBLANK( Customer_Name_c ), ISBLANK( Percentage_c ), ISBLANK( Making_Charges_c ), ISBLANK( Prices_c ), ISBLANK( Stone_Weight_c ), ISBLANK( Silver_Price_c ), ISBLANK( Stone_Other_Price_c ), ISBLANK( Stone_Weight_c ), ISBLANK( Height_c ) )
```

An error message is displayed: "Error: Syntax error. Missing ')'". A tooltip for the 'ABS' function is visible on the right.

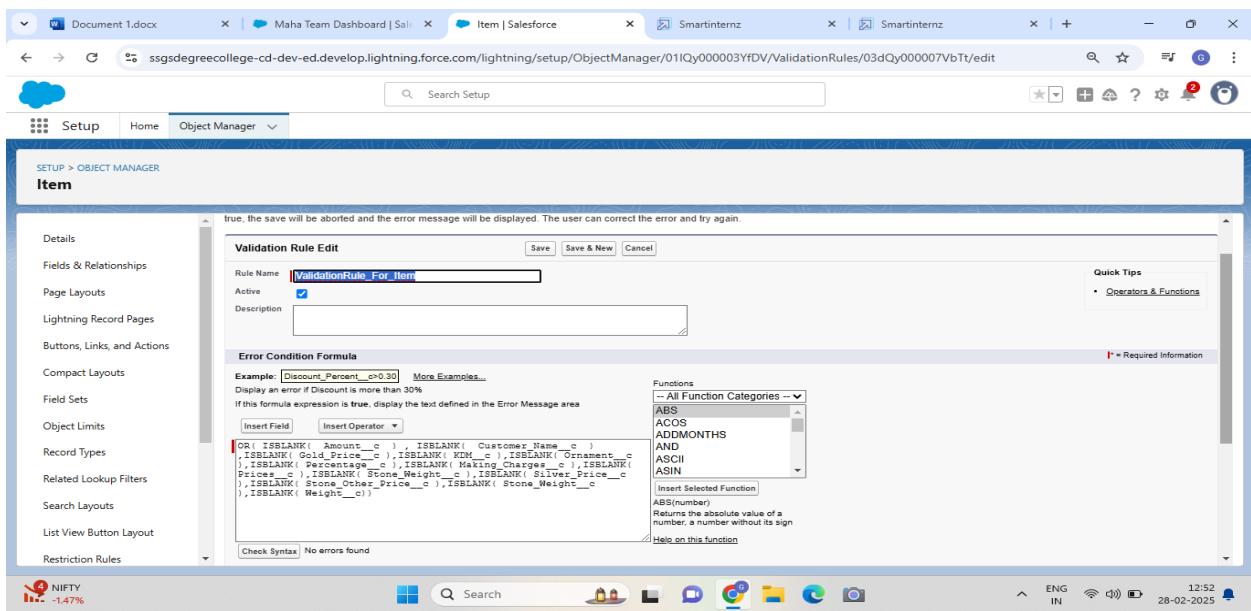
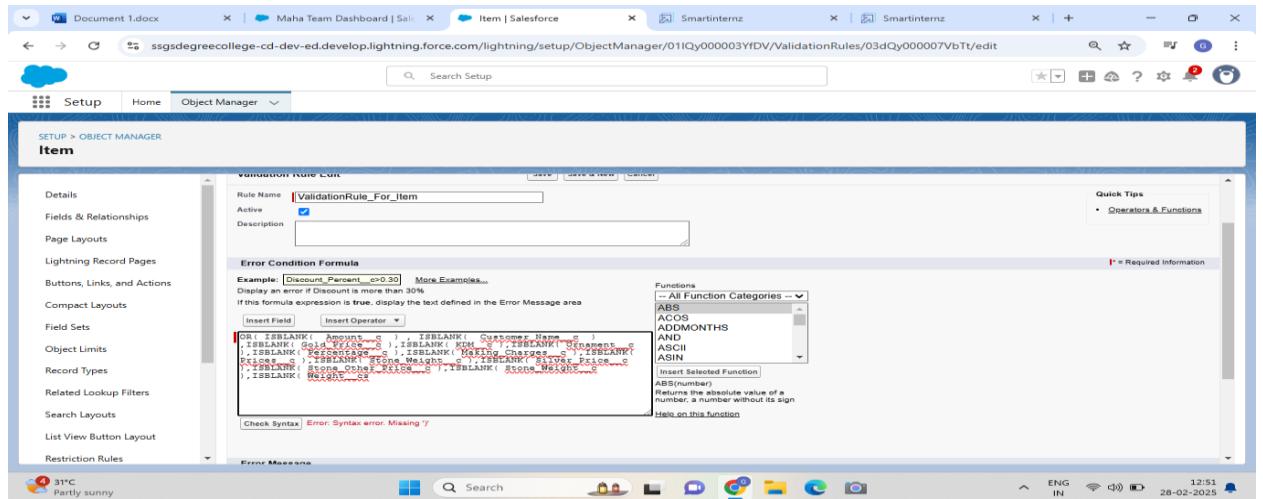
The screenshot shows the same Validation Rule Editor window, but now it displays "No errors found". The validation rule formula remains the same:

```
OR( ISBLANK( Amount_c ), ISBLANK( Customer_Name_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( Height_c ) )
```

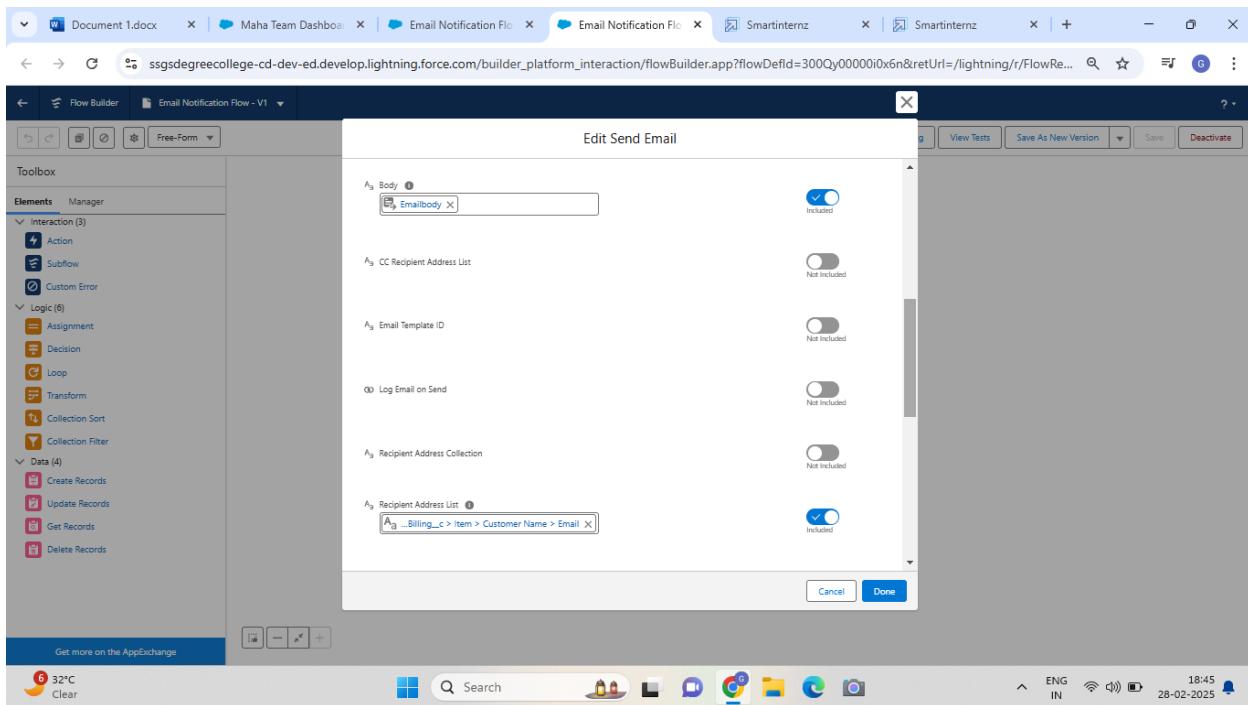
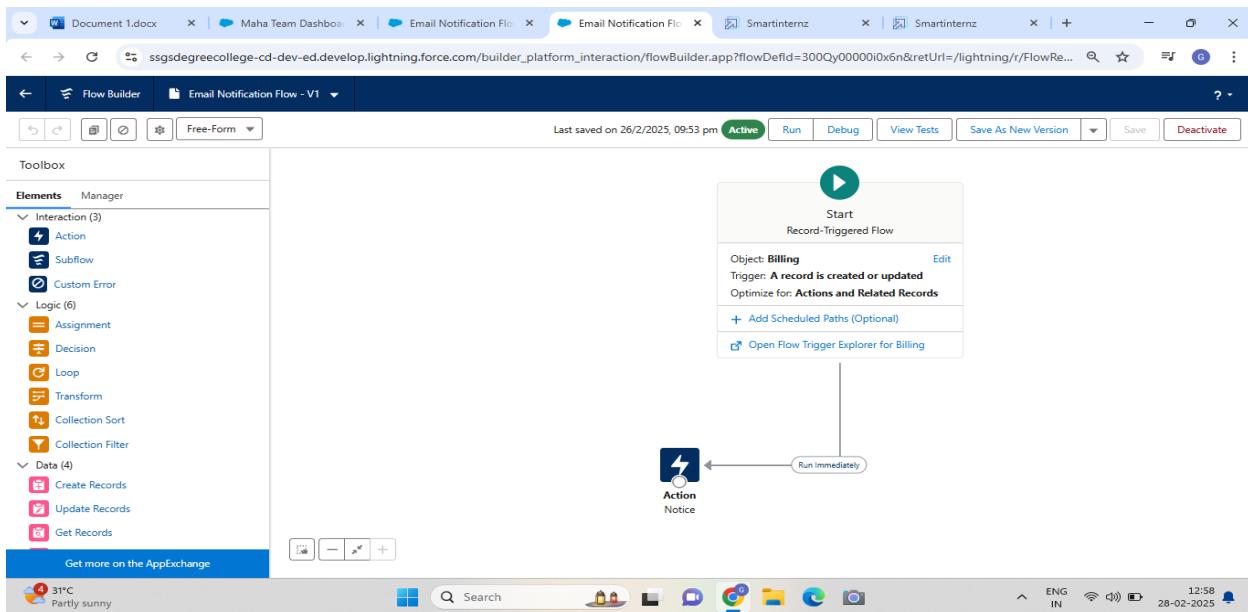
Flows:



♥ Validation Rules: -



Flows:



♥ User Adoption: -

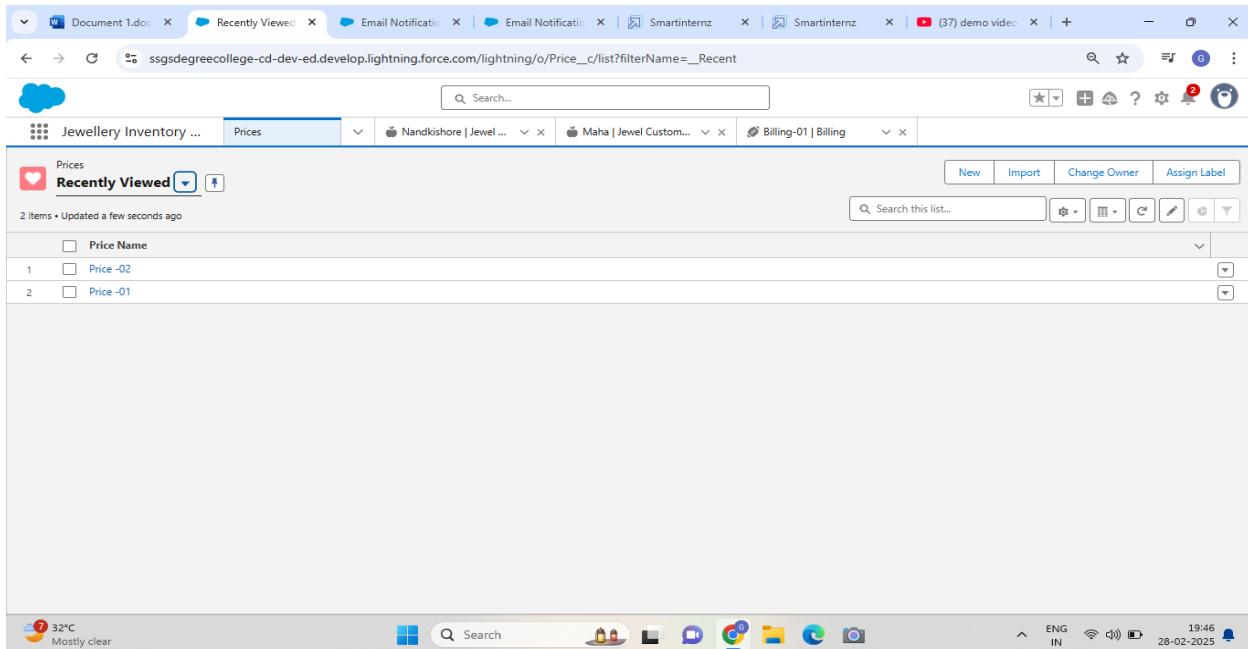
We created some jewel customers, items ,billings ,prices ,customer orders in **Jewelry Inventory System**.

The screenshot shows a web browser window with multiple tabs open. The active tab is a list titled "Recently Viewed" under "Jewel Customers". The list contains three items: Nandkishore, Gowri, and Maha. The browser interface includes a search bar, navigation buttons, and a toolbar with various icons. The status bar at the bottom shows weather information (32°C, Mostly clear), system icons, and the date/time (28-02-2025, 19:29).

Customer name
1 Nandkishore
2 Gowri
3 Maha

This screenshot shows a similar web browser interface to the first one. The active tab is also "Recently Viewed" under "Jewel Customers", displaying the same list of three items: Nandkishore, Gowri, and Maha. The browser's header, toolbar, and status bar are identical to the first screenshot.

Customer name
1 Nandkishore
2 Gowri
3 Maha



(6). Key Scenarios Addressed by Salesforce in the Implementation Project:

Salesforce implementation is a process of rolling out its core product — CRM (customer relationship management) system — to centralize all key business activities and communication.

Validation Rules:-

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

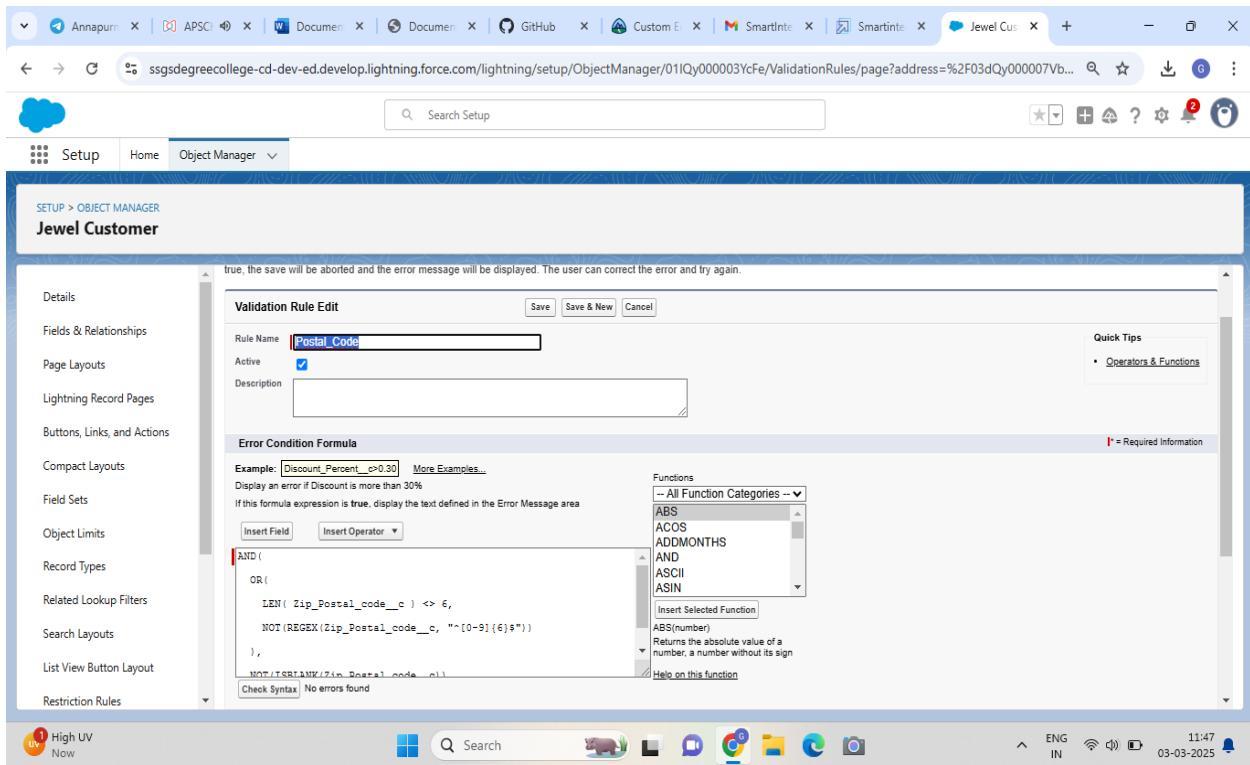
In setup page ,in object manager selected jewel customer there we selected validation rules in that we entered the rule name as “postal Code ”. and inserted the error Condition Formula as

```

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

```

We Entered the Error Message as “Must contain 6 digits”, selected the Error location as Field and selected the field as “Zip/Postal code”, and saved the rule.



Created One more Validation rule for Jewel Customer object.

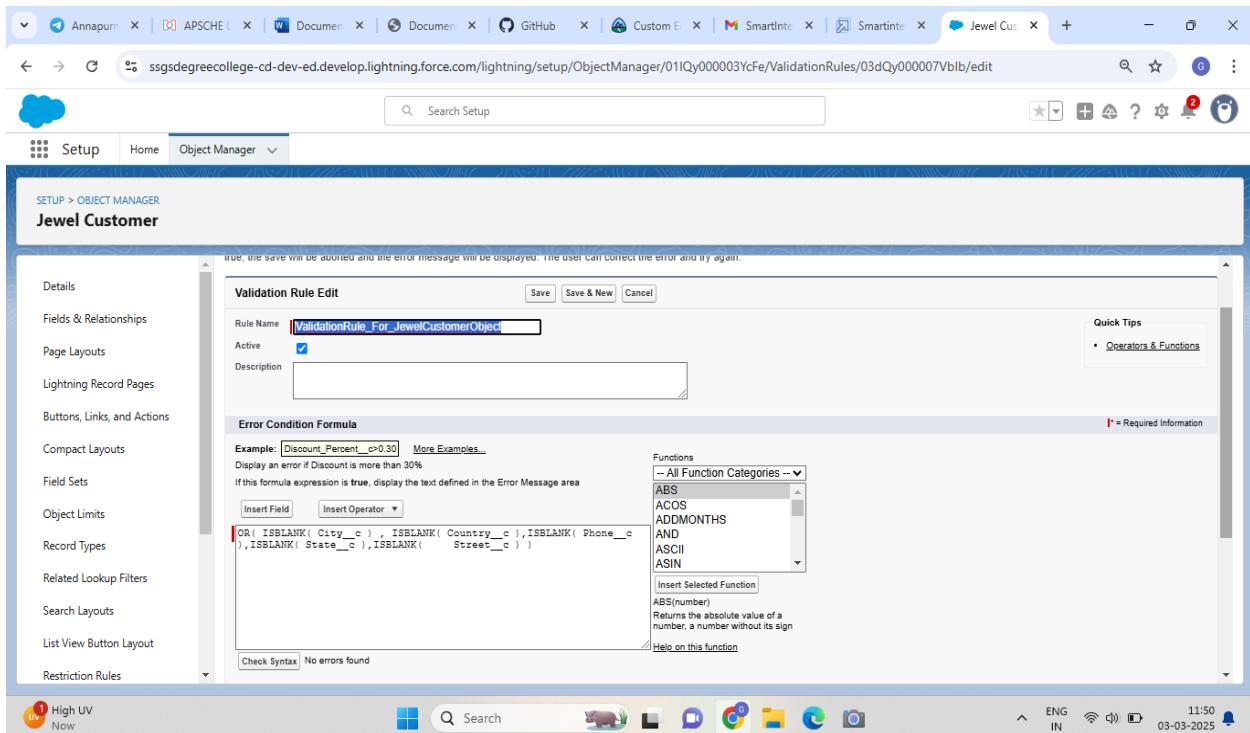
Entered Rule name as “ValidationRule for JewelCustomerObject “

Question1: -What is the inserted Error Condition Formula?

**Solution: -OR (ISBLANK(City__c),
ISBLANK(Country__c),ISBLANK(Phone__c),ISBLANK(State__c),ISBLANK(Street__c))**

Question2: -What is the Error Message?

Solution: -The Error Message as “Please fill Required fields”.



Created Validation rule for Item object.

Question 3: -What is the entered rule?

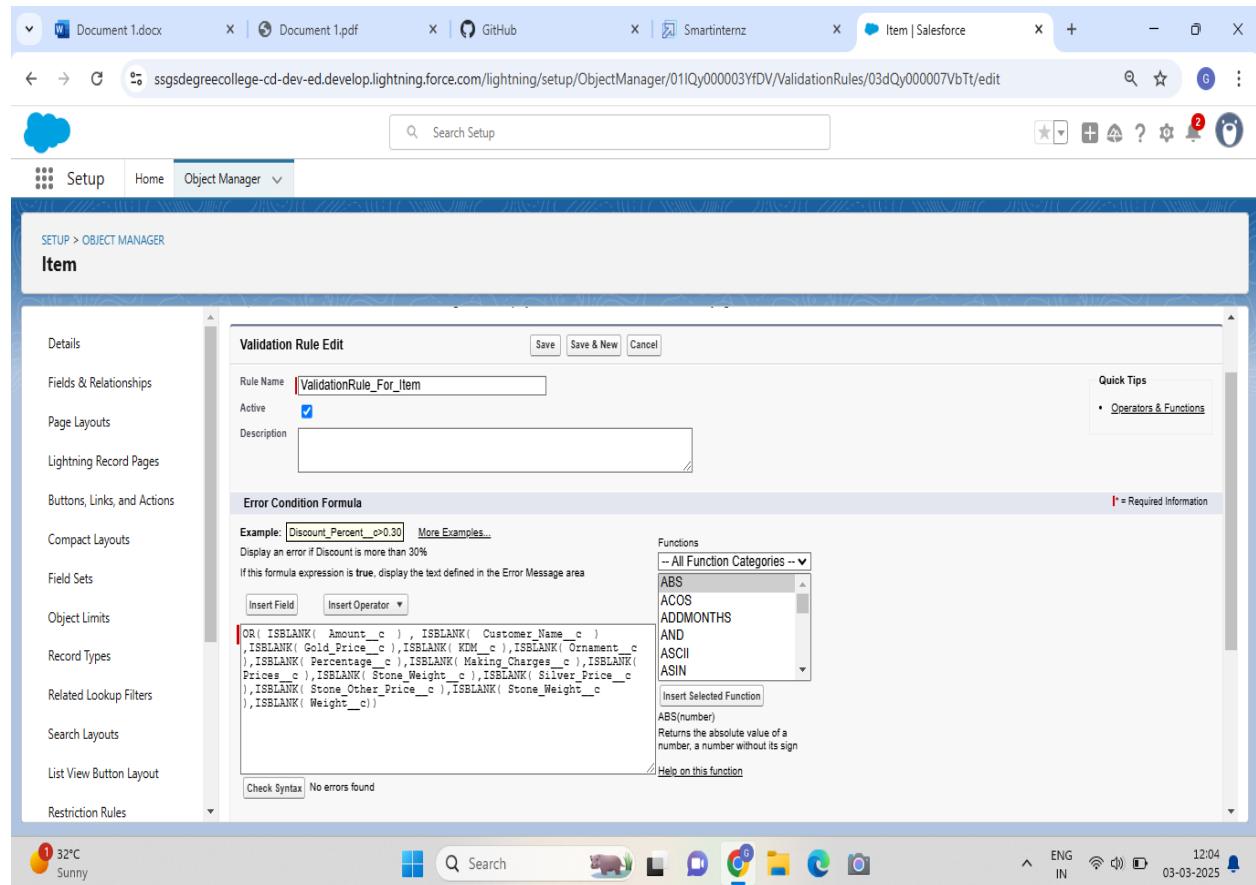
Solution: -Entered Rule name as “ValidationRule for Item ”.

Question4: -What is the inserted Error Condition Formula?

Solution:- 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))

Question5: -What is the Entered Error Message?

Solution: -The Error message is “Please fill Required fields”.



Question 1:-What is the ornament?

Solution:- Necklace

Question 2:-What is the price of a gold?

Solution:-\$800000

Question 3 :- What is the price of silver?

Solution :- \$700000

Question 4:-What is the KDM charges?

Solution: - ₹32,000

Question 5: -What is the stone/other price?

Solution: -₹10,000

Question 6: -What is the percentage of Item?

Solution: -10%

The screenshot shows a CRM application interface with a top navigation bar containing several tabs: 'Jewellery Inventory ...', 'Reports', 'Maha | Jewel...', 'Item-01 | Item', 'Price -01 | Pr...', 'Customer Or...', and 'Billing-01 | B...'. Below the navigation bar, there is a header section with a yellow icon labeled 'Jewel Customer Maha'. The main content area is titled 'Details' and contains two columns of customer information:

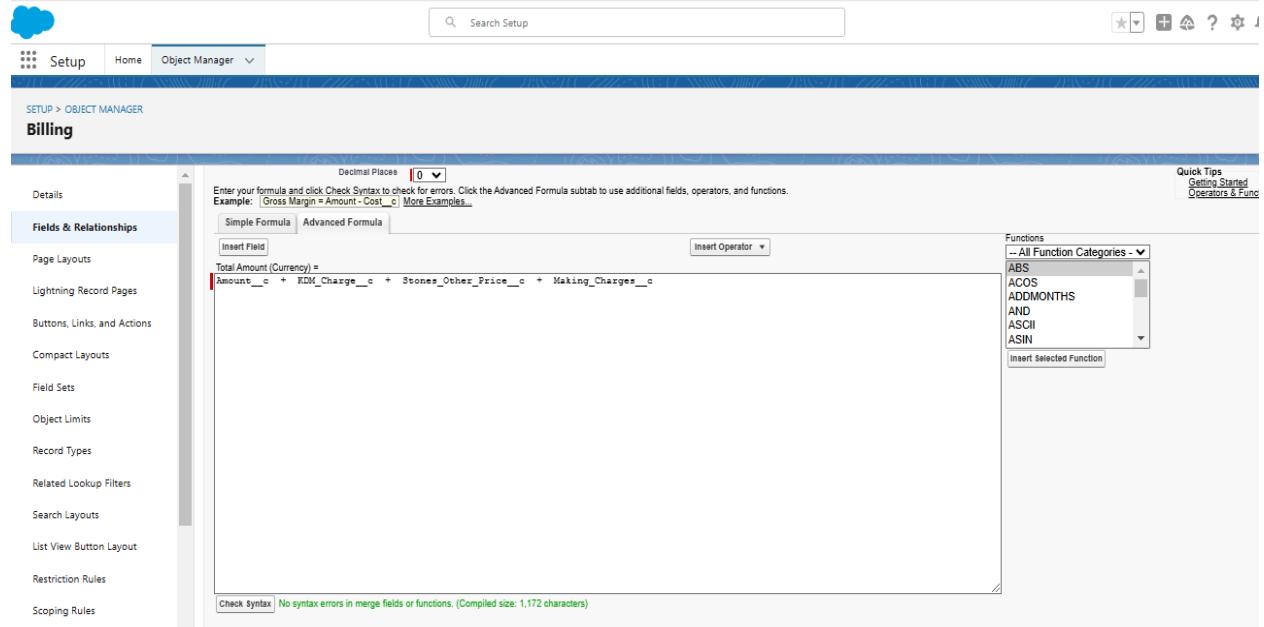
Customer name	Owner
Maha	Maha Team SSGS
Phone	Street
09876543210	tilak Nagar
Email	City
gundagowripriya@gmail.com	Guntakal
Created By	State
Maha Team SSGS, 26/02/2025, 4:05 pm	Andhra Pradesh
Last Modified By	Country
Maha Team SSGS, 26/02/2025, 9:57 pm	India
Zip/Postal code	
515801	

In Billing Object:-

We created a field "Total Amount" the data type is "Formula" and the record type is "Currency".

Question1:-What is the advanced formula?

Solution:- Amount_c + KDM_Charge_c +
Stones_other_price_c + Making_Charges_c



(7) Conclusion:

CRM is a software system that helps businesses manage their interactions with customers, clients, and prospects. It provides a

centralized platform for managing customer data, communication, and interactions across various touchpoints.

CRM enables jewelry businesses to gain a deeper understanding of their customers. By gathering and analyzing customer data, businesses can identify buying patterns, preferences, and behaviors. This insight allows businesses to tailor their marketing and sales efforts to meet the specific needs and wants of their customers.

CRM refers to Customer Relationship Management

It is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple to improve Business relationships. A CRM system helps companies stay connected to customers, streamline processes & improve Profitability.



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.

By providing personalized recommendations and rewards for loyalty, you can create a positive customer experience that keeps customers coming back and drives revenue growth.

The jewelry industry is all about creating an emotional connection with customers. It's not just about selling a piece of jewelry, it's about creating an experience that makes the customer feel special and valued. That's why customer experience and loyalty are critical in the jewelry industry.

A good CRM system can help you achieve this. By capturing customer data and tracking their preferences and purchase history, you can tailor your offerings to their individual needs and tastes. This can lead to a more personalized experience for the customer, making them feel like they are being taken care of and understood.

In addition, a CRM system can help you stay in touch with your customers through targeted marketing campaigns and personalized communications. By sending them offers and information that is relevant to their interests, you can increase the likelihood of repeat business and foster a sense of loyalty.

A jewelry CRM project is a business initiative that uses customer relationship management (CRM) software to improve customer service and sales.



CRM is a tool that allows businesses to manage relationships with their customers effectively. It provides a structured interaction and gives businesses a better way of understanding their customers

Thank You Mam....

