

CRM Application for Jewel Management (Developer)

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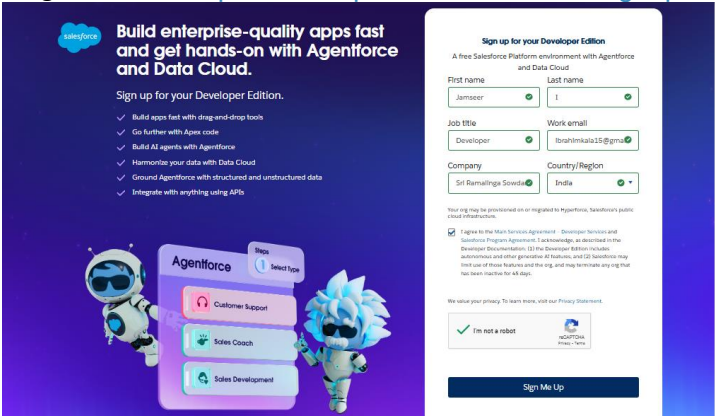
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INTRODUCTION :

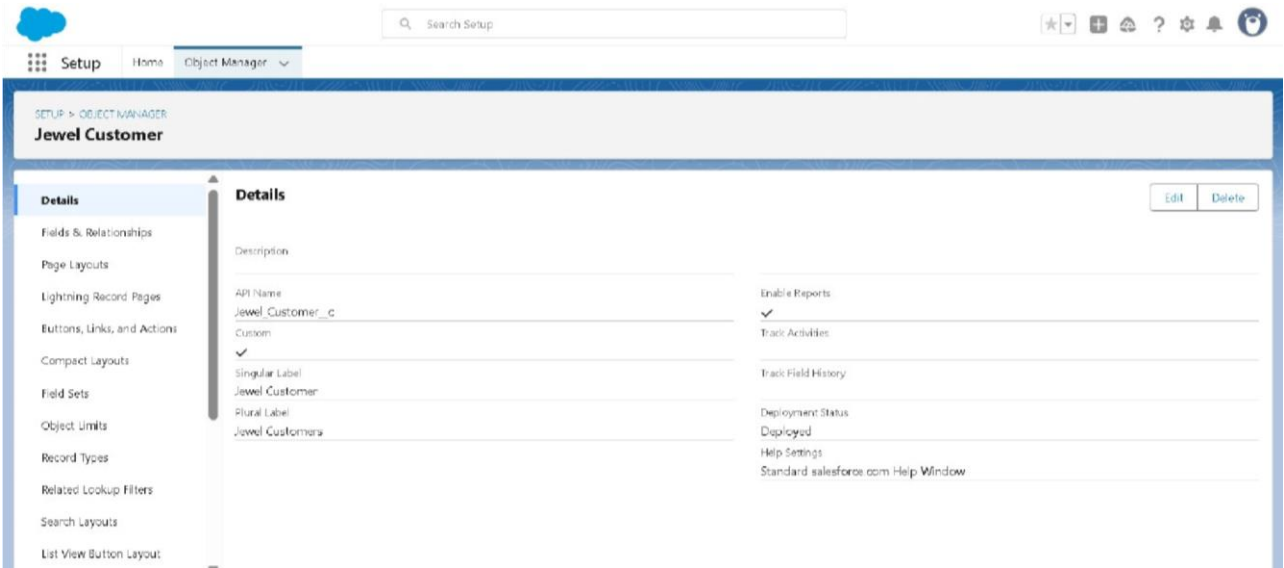
The Jewel Inventory System is a comprehensive software Solution designed to streamline and manage the inventory and sales processes of a jewellery store or a jewellery manufacturer. The system aims to provide an efficient and user-friendly solution to track and control the inventory of various jewellery items, maintain accurate records, and facilitate seamless sales transactions.

DEVELOPMENT PHASE :

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



Create Jewel Customer Object :



Create Objects - Item , Customer Order , Price , Billing :

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

Item

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

Details

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

Edit

Delete



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Customer Order

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Details

Description

API Name

Customer_Order__c

Custom

✓

Singular Label

Customer Order

Plural Label

Customer Orders

Enable Reports

✓

Track Activities

Track Field History


Deployment Status

Deployed








Help Settings

Standard salesforce.com Help Window

EditDelete



Search Setup



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Details

Description

API Name

Billing__c

Custom

✓

Singular Label

Billing

Plural Label

Billings

Enable Reports

✓

Track Activities

Track Field History


Deployment Status

Deployed








Help Settings

Standard salesforce.com Help Window

EditDelete



Search Setup



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Details

Description

API Name

Price__c

Custom

✓

Singular Label

Price

Plural Label

Prices

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

Creating Lookup Relationship - Customer :

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Restriction Rules

Scoping Rules

Object Access

Triggers

Fields & Relationships

5 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	Customer_c	Lookup(Lead Customer)		✓	▼
Customer Name	Name	Auto Number		✓	▼
Item	Item_c	Master-Detail(Item)		✓	▼
Last Modified By	LastModifiedById	Lookup(User)			

Creating a Master-Detail Relationship - Item :

Creating Text Field , Phone , Email in Jewel Customer Object :

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Setup > OBJECT MANAGER

Jewel Customer

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Restriction Rules

Scoping Rules

Object Access

Triggers

Fields & Relationships

7 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)		
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		

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Triggers

Fields & Relationships

5 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	Customer__c	Lookup(Jewel Customer)		✓
Customer Name	Name	Auto Number		✓
Item	Item__c	Master-Detail(Item)		✓
Last Modified By	LastModifiedById	Lookup(User)		

Creating the number,Picklist fields in Item object :

Creating Formula Field (Cross Object) in Item Object :

Setup

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Triggers

Fields & Relationships

10 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)		
Expected Days Of Return	Expected_Days_Of_Return__c	Picklist		
Gold Price	Gold_Price__c	Formula (Currency)		
Item Id	Name	Auto Number		✓
Item Type	Item_Type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Prices	Prices__c	Lookup(Price)		✓
Priority	Priority__c	Picklist		
Purity	Purity__c	Number(2, 0)		

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Scoping Rules

Object Access

Triggers

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)		
Item Id	Name	Auto Number		✓
Item Type	Item_Type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Purity	Purity__c	Number(2, 0)		

Creating the validation rule - Postal Code & ValidationRule For JewelCustomerObject :
Creating the validation rule - ValidationRule For Item :

SETUP > OBJECT MANAGER

Jewel Customer

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Restriction Rules

Scoping Rules

Object Access

Jewel Customer Validation Rule

Back to Jewel Customer

Validation Rule Detail

Edit

Clone

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))))		
Error Message	Must contain 6 digits, select the Error location as Field and select the field as 'Zip/Postal code'	Error Location	Top of Page
Description			
Created By	Jamseer J. 9/3/2025, 10:01 PM	Modified By	Jamseer J. 9/3/2025, 10:01 PM

Edit

Clone

Gold Smith Profile :

Setup Home Object Manager

Search Setup

Validation Rules

2 items, Sorted by Rule Name

Rule Name

Error Location

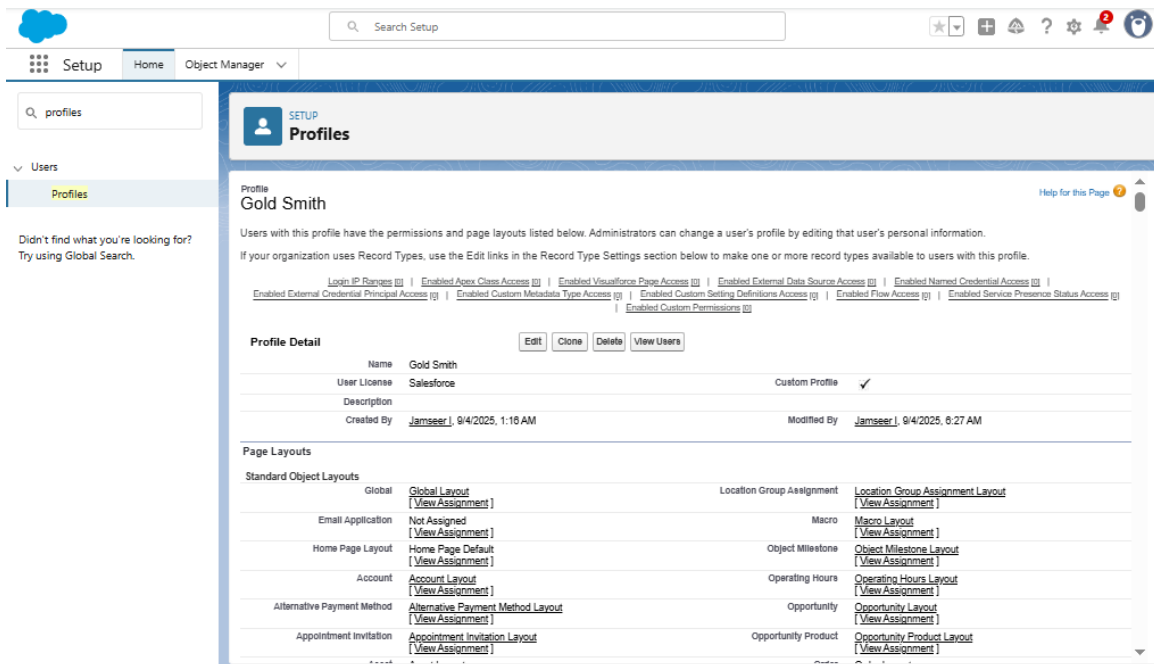
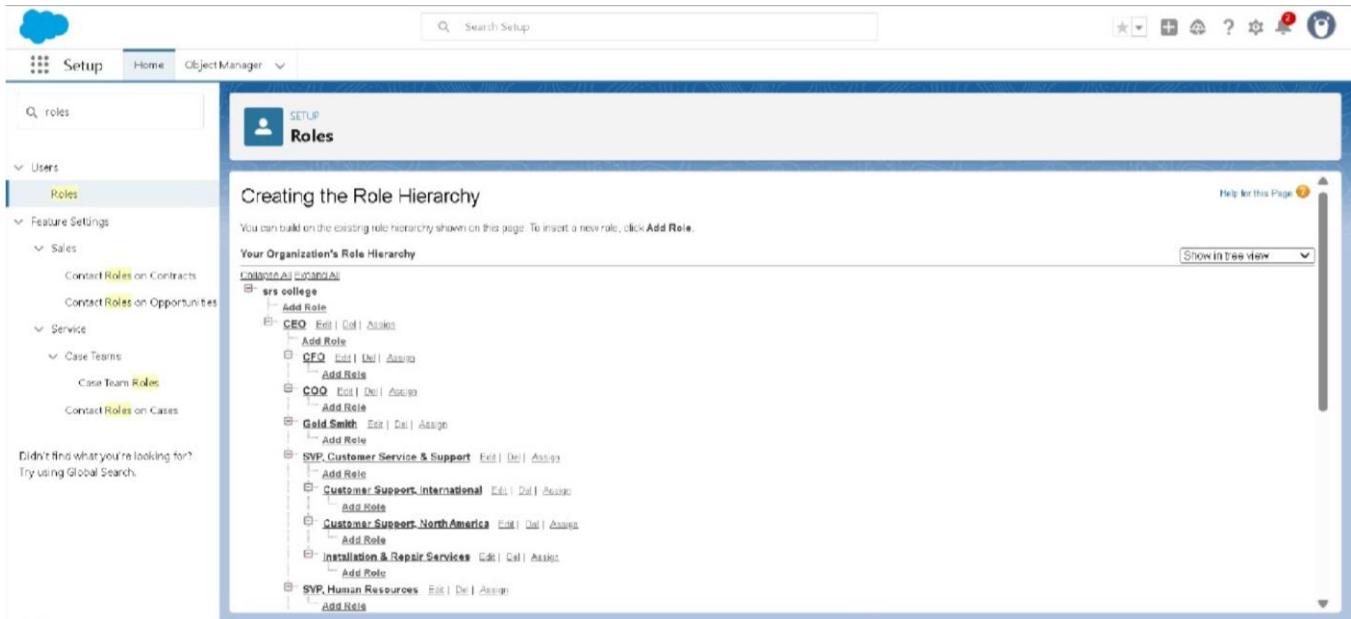
Error Message

Active

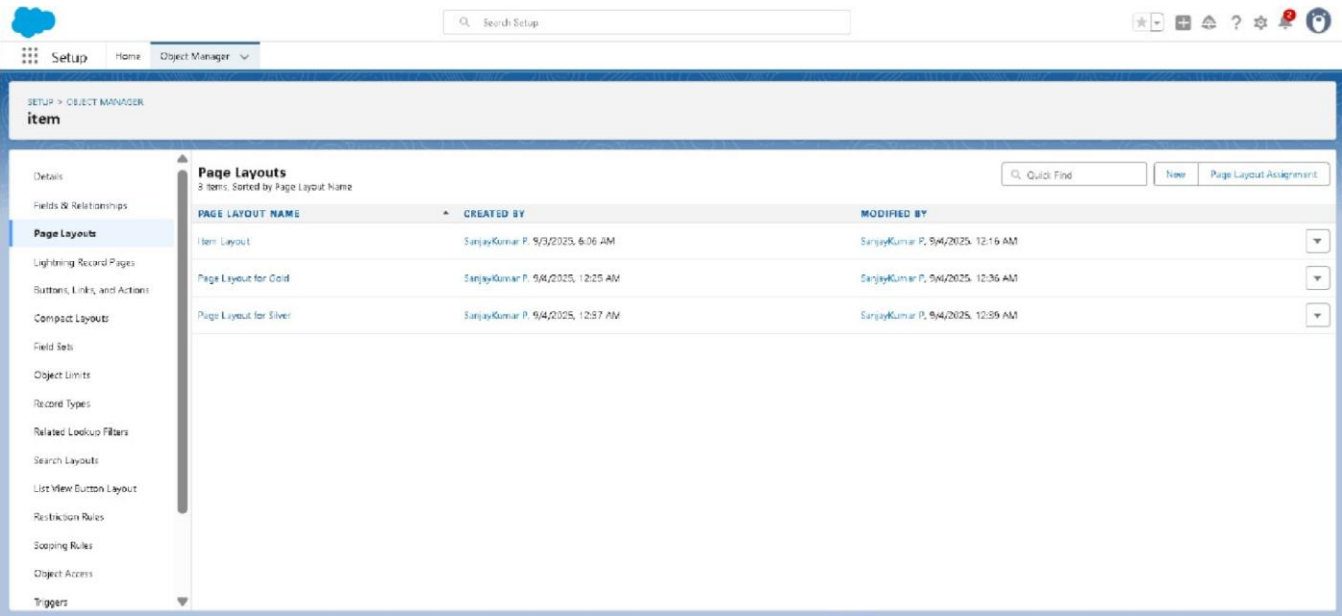
Modified By

Postal_Code	Zip/Postal code	Must contain 6 digits	✓	Srinjay Kumar P. 9/3/2025, 11:03 PM
ValidationRule_For_JewelCustomerObject	Top of Page	Please fill Required fields	✓	Srinjay Kumar P. 9/3/2025, 11:10 PM

Creating Gold Smith Role :

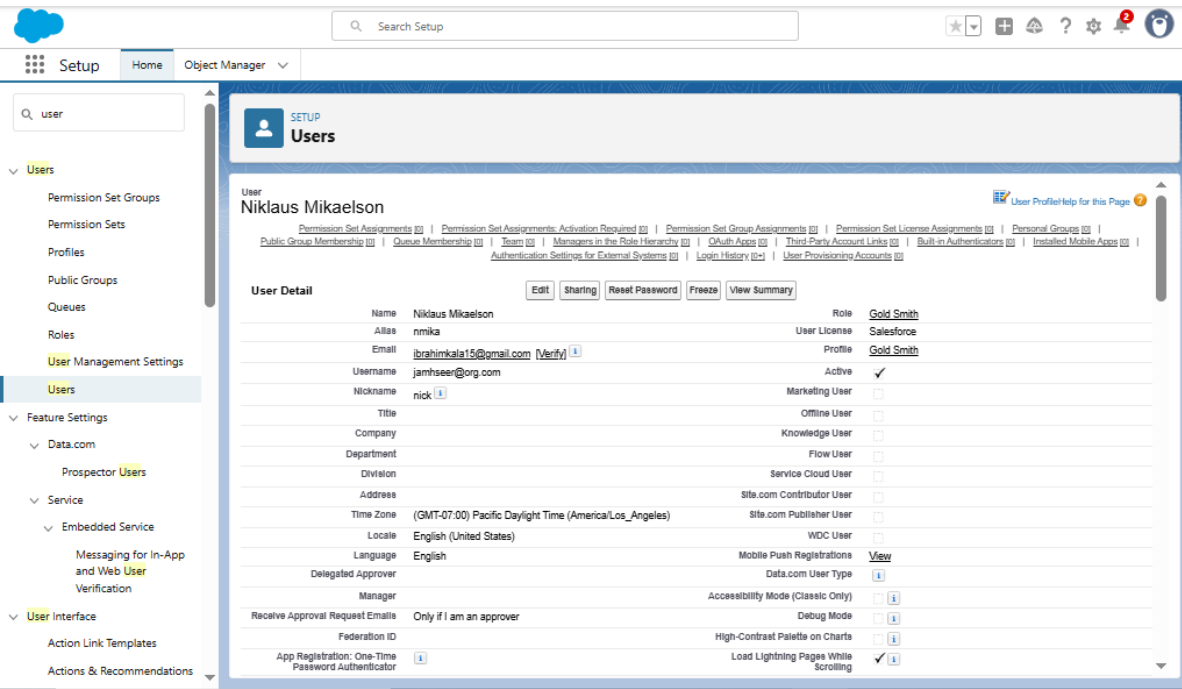



To Create Gold & Silver Page layouts :










To create a Record Type - Gold & Silver :

Creating permission set :





Search Setup



SetupHomeObject Manager

permission set

Users

Permission Set Groups

Permission Sets

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

PERMISSION SET PER TO WORKER

Per to Worker

Current Assignments

☐

Full Name ↑

▼

Active

☐

kail das

Role

Worker

☐

Profile

▼

Worker Profile

☐

User License

▼

Salesforce Platform

☐

Expires On


▼

✎








🗑

Add Assignment

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Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

item

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List View Button Layout

Record Types

2 Items, Sorted by Record Type Label

Q Quick Find

New

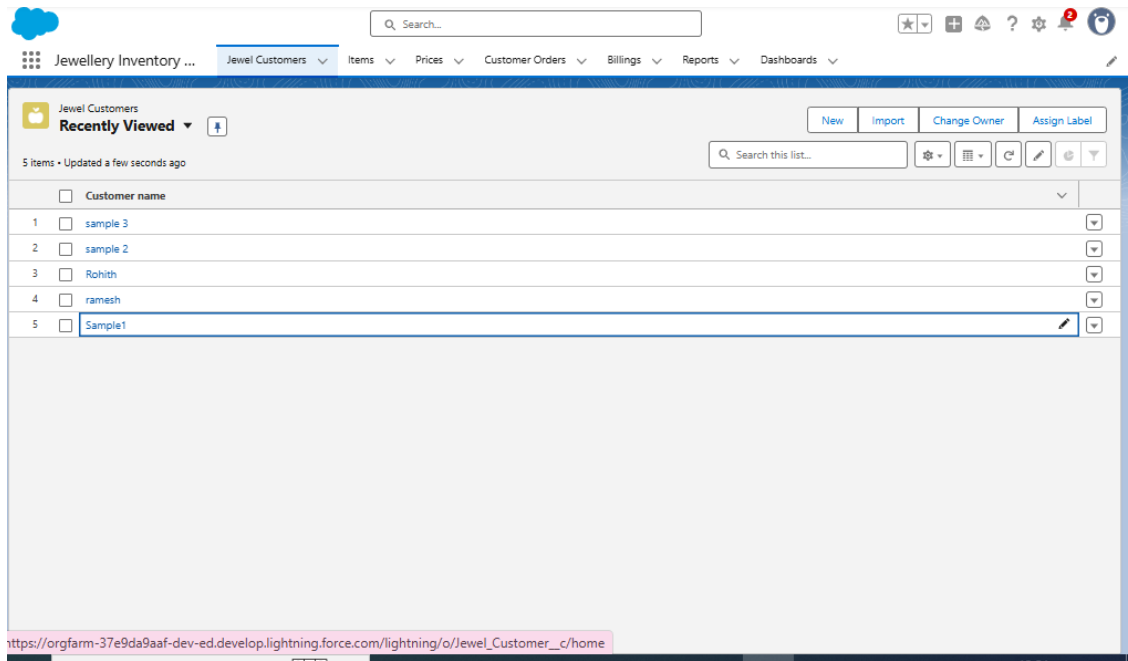
Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY	
Gold	Gold Items Information	✓	SanjayKumar P, 9/4/2025, 12:47 AM	▼
Silver	Silver Items Information	✓	SanjayKumar P, 9/4/2025, 12:50 AM	▼

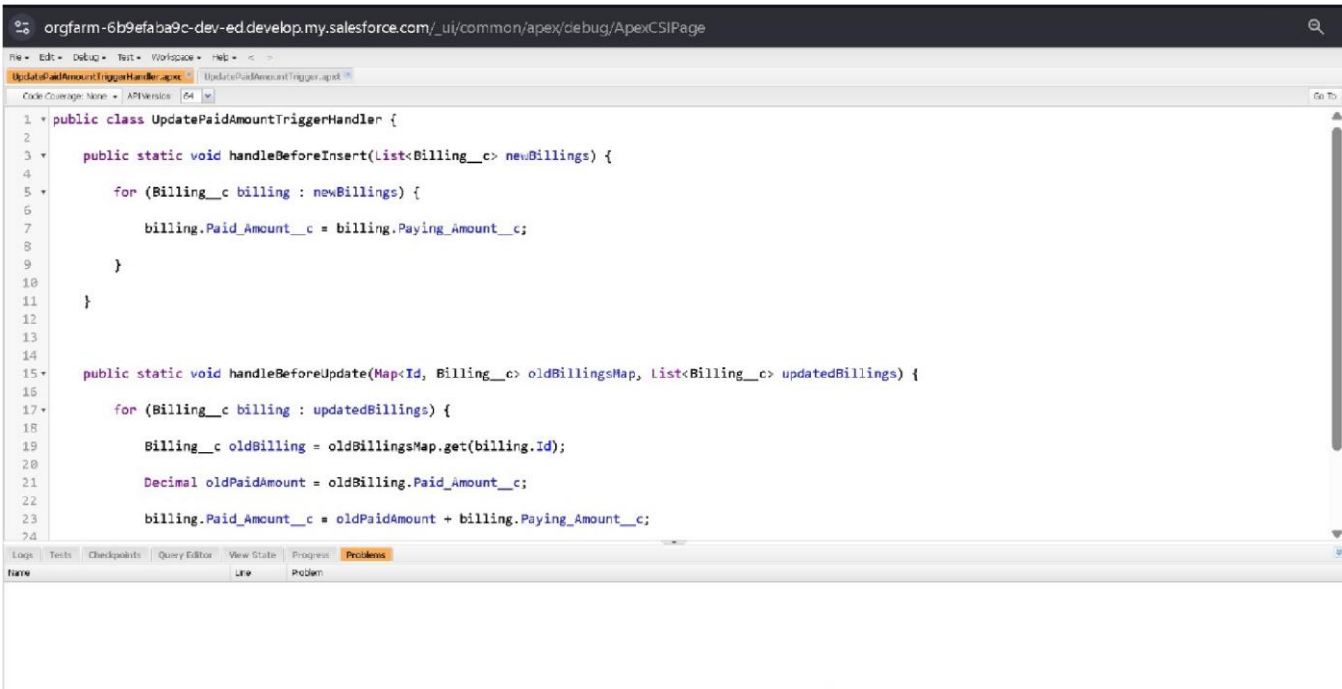
orgname-609efa6a9c-dev-ed.develop lightning.force.com/zoneAone.app

Create a Trigger Handler class & The Trigger :

Create,View and Delete a Record (Jewel Customer) :



Create Report :



Create Dashboard :

Jewellery Inventory ...

Jewel Customers

Items

Prices

Customer Orders

Billings

Reports

Dashboards

Q Search...

★

+

?

🔔

Dashboard

dashboard 1

Last refreshed 4 days ago. Refresh this dashboard to see the latest data.

As of Sep 4, 2025, 7:40 PM

Viewing as Jamseer I

RefreshEditSubscribe

Prices Report

Price: ID ↑	Gold Price	Price: Item Id
a03gk000009nLcQ	\$9k	Item-01

View Report (Prices Report)

As of Sep 4, 2025, 7:40 PM

Create a Flow :

Google Chrome isn't your default browser

Set as default

Q Search...

★

+

?

🔔

Jewellery Inventory ...

Jewel Customers

Items

Prices

Customer Orders

Billings

Reports

Dashboards

Report: Prices

Prices Report

Enable Field Editing

Q

Add Chart

⌵

⌵

Edit

⌵

Total Records

Total Gold Price

1

\$9,000

	Price: ID	Gold Price	Price: Item Id
1	a03gk000009nLcQ	\$9,000	Item-01
2		\$9,000	

Conclusion :

The CRM Application for Jewel Management successfully streamlined customer interactions, sales tracking, and inventory management for jewelry businesses. As a developer, I focused on building a secure, scalable, and user-friendly system tailored to industry needs. This project enhanced operational efficiency and improved customer engagement. It also laid the groundwork for future features like analytics and mobile support.

