

CRM Application for Jewel Management - (Developer)

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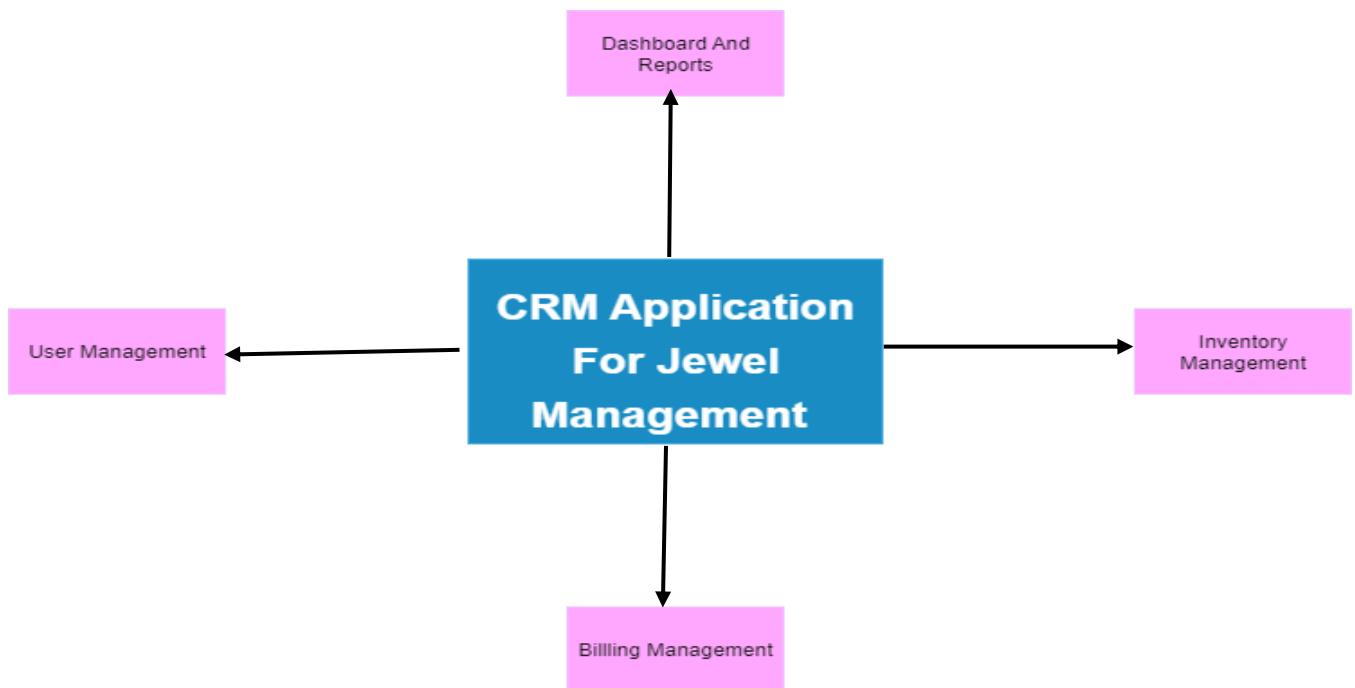
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1. INTRODUCTION

1.1 Project Overview

The Jewel Inventory and CRM System is a comprehensive Salesforce-based application designed to modernize and optimize the core business processes of a jewelry store or manufacturer. The system provides a centralized platform for managing a complete lifecycle, from inventory tracking to sales, and nurturing customer relationships. By leveraging the Salesforce platform, the application aims to replace fragmented, manual processes with a single, efficient, and user-friendly solution, ensuring accurate data, seamless transactions, and enhanced customer engagement.



1.2 Purpose

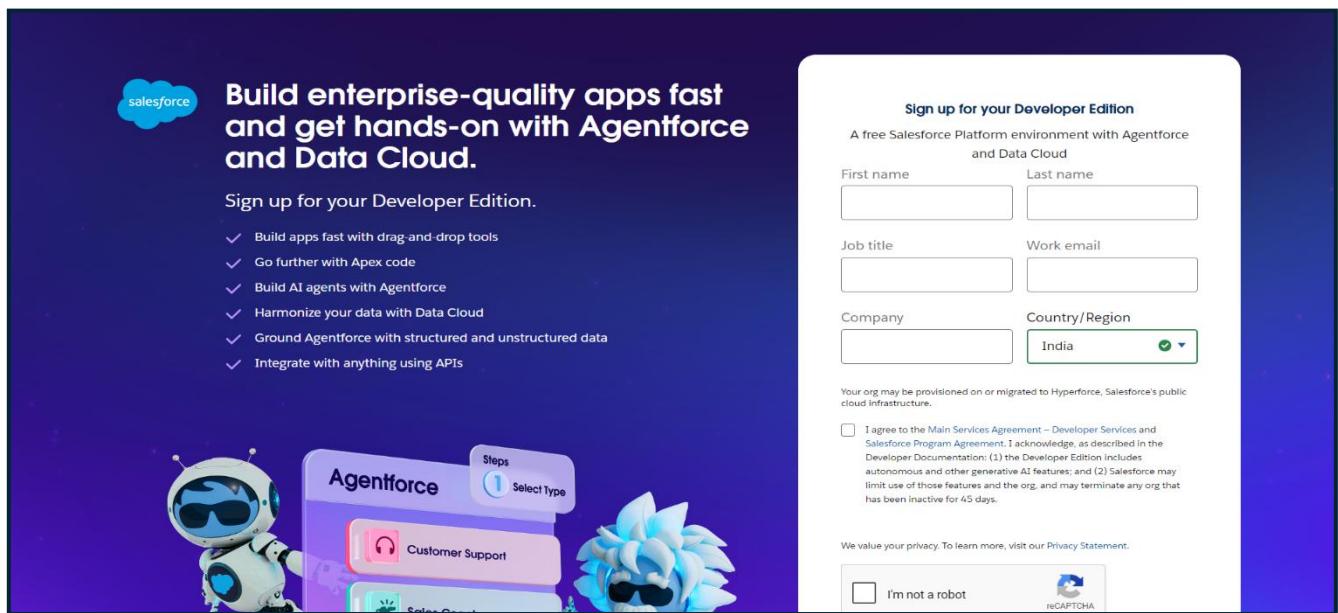
The purpose of the Jewel Inventory and CRM System is to provide a comprehensive and efficient software solution for a jewelry business. It's designed to solve the common challenges faced by jewelers, such as manual inventory tracking, disorganized customer data, and disconnected sales processes.

2. Development Phase:

Creating Developer Account:

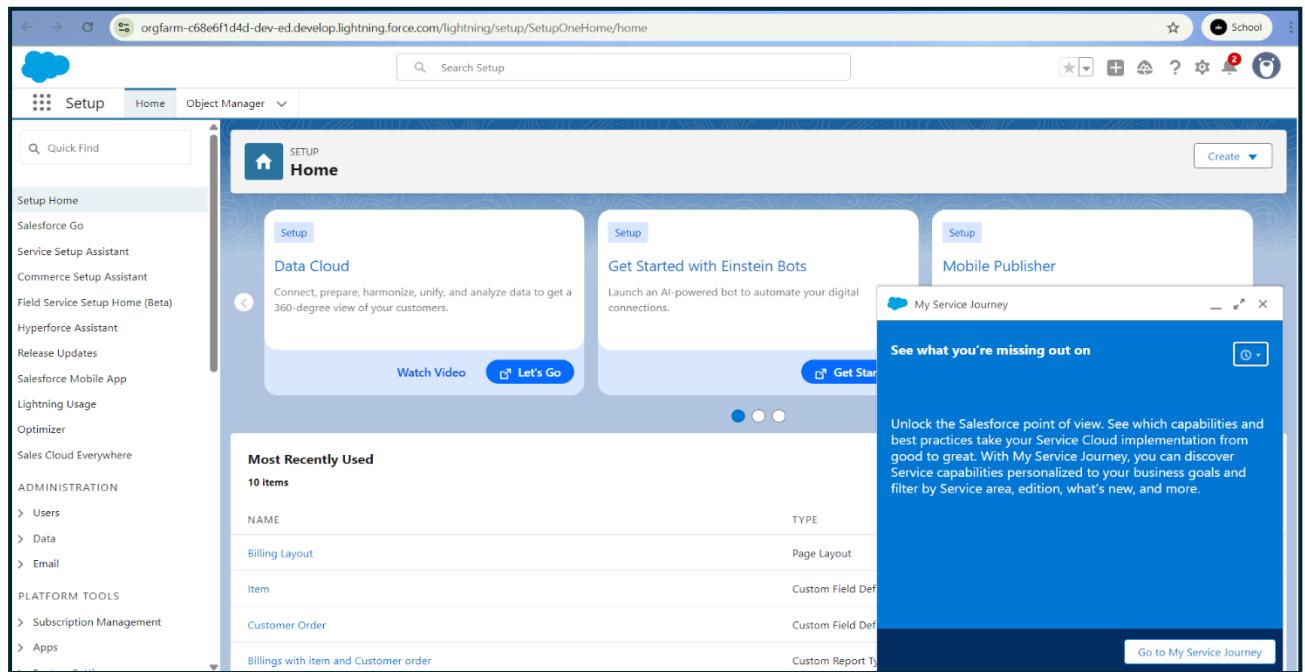
Creating a developer org in salesforce.

Go to <https://developer.salesforce.com/signup>



Account Activation:

Go to the inbox of the email that you used while signing up. Click on the Reset Password to activate your account. The email may take 5-10mins.



Create Jewel Customer Object:

Created Object Properties: Jewel Customer, Item, Customer Order, Price, Billing.

Custom Name	Label	Type
Contract	Contract	Standard Object
Contract Line Item	ContractLineItem	Standard Object
Coupon	Coupon	Standard Object
Credential Stuffing Event Store	CredentialStuffingEventStore	Standard Object
Credit Memo	CreditMemo	Standard Object
Credit Memo Invoice Application	CreditMemoinvApplication	Standard Object
Credit Memo Line	CreditMemoLine	Standard Object
Custom Library	DataMaskCustomValueLibrary	Standard Object
Customer	Customer	Standard Object
Customer Order	Customer_Order__c	Custom Object
D&B Company	DandBCompany	Standard Object
Data Kit Deployment Log	DataKitDeploymentLog	Standard Object
Data Use Legal Basis	DataUseLegalBasis	Standard Object
Data Use Purpose	DataUsePurpose	Standard Object

orgfarm-c68e6f1d4d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001iYS2/Details/view

The screenshot shows the Salesforce Object Manager interface for the 'Customer Order' object. The left 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, and Object Access. The main 'Details' tab is selected. The right panel displays the following details for the 'Customer Order' object:

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

At the top right of the main panel are 'Edit' and 'Delete' buttons.

orgfarm-c68e6f1d4d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001icSP/Details/view

The screenshot shows the Salesforce Object Manager interface for the 'Item' object. The left sidebar lists the same configuration tabs as the previous screenshot. The main 'Details' tab is selected. The right panel displays the following details for the 'Item' object:

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

At the top right of the main panel are 'Edit' and 'Delete' buttons.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and various global icons. The main content area displays the 'Billing' object details. On the left, a sidebar lists configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions (which is currently selected), 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 main 'Details' section shows the following fields:

- 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

Buttons 'Edit' and 'Delete' are located in the top right corner of the details section.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and various global icons. The main content area displays the 'Jewel Customer' object details. The sidebar on the left is identical to the one in the previous screenshot. The main 'Details' section shows the following fields:

- Description
- API Name: Jewel_Customer_c
- Custom: ✓
- Singular Label: Jewel Customer
- Plural Label: Jewel Customers
- Enable Reports: ✓
- Track Activities
- Track Field History
- Deployment Status: Deployed
- Help Settings
- Standard salesforce.com Help Window

Buttons 'Edit' and 'Delete' are located in the top right corner of the details section.

Creating a Custom Tab:

Create tab: Customer, Customer Order, Price, Billing objects.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. A search bar at the top left contains the text 'tabs'. On the left sidebar, under 'User Interface', the 'Tabs' section is highlighted. The main content area displays a 'Custom Object Tab' named 'Billings'. Below it, a 'Custom Tab Definition Detail' table provides information about the tab:

Tab Label	Billings	Object	Billing	Tab Style	Bell
Description				Splash Page Custom Link	
Created By	Saravanan P	8/24/2025, 11:27 PM		Modified By	Saravanan P
					8/24/2025, 11:27 PM

A message at the bottom left says, ' Didn't find what you're looking for? Try using Global Search.' A 'Help for this Page' link is located in the top right corner.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. A search bar at the top left contains the text 'tabs'. On the left sidebar, under 'User Interface', the 'Tabs' section is highlighted. The main content area displays a 'Custom Object Tab' named 'Customer Orders'. Below it, a 'Custom Tab Definition Detail' table provides information about the tab:

Tab Label	Customer Orders	Object	Customer Order	Tab Style	Car
Description				Splash Page Custom Link	
Created By	Saravanan P	8/24/2025, 11:26 PM		Modified By	Saravanan P
					8/24/2025, 11:26 PM

A message at the bottom left says, ' Didn't find what you're looking for? Try using Global Search.' A 'Help for this Page' link is located in the top right corner.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page open for the 'Item' object. The left sidebar has 'User Interface' expanded, with 'Tabs' selected. The main content area displays the 'Custom Object Tab Items' section. A table titled 'Custom Tab Definition Detail' shows one row for the 'Item' tab. The table includes columns for 'Tab Label' (set to 'Item'), 'Object' (set to 'Item'), 'Description' (empty), 'Created By' (set to 'Saravanan_P'), and 'Modified By' (set to 'Saravanan_P'). The 'Tab Style' is set to 'Star'. Buttons for 'Edit' and 'Delete' are visible at the top of the table.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page open for the 'Jewel Customer' object. The left sidebar has 'User Interface' expanded, with 'Tabs' selected. The main content area displays the 'Custom Object Tab Jewel Customers' section. A table titled 'Custom Tab Definition Detail' shows one row for the 'Jewel Customer' tab. The table includes columns for 'Tab Label' (set to 'Jewel Customers'), 'Object' (set to 'Jewel Customer'), 'Description' (empty), 'Created By' (set to 'Saravanan_P'), and 'Modified By' (set to 'Saravanan_P'). The 'Tab Style' is set to 'Jewel'. Buttons for 'Edit' and 'Delete' are visible at the top of the table.

Custom Tab Definition Detail

Tab Label	Prices	Tab Style	People
Object	Price	Splash Page	Custom Link
Description			
Created By	Saravanan_P 8/24/2025, 11:27 PM	Modified By	Saravanan_P 8/24/2025, 11:27 PM

Create a Lightning App:

Create a Lightning App With Name Jewellery Inventory System

Lightning Experience App Manager

App Name ↑	Developer Name	Description	Last Modified Date	App T...	Visib...
All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	8/12/2025, 12:08 AM	Classic	✓
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	8/12/2025, 12:08 AM	Classic	✓
App Launcher	AppLauncher	App Launcher tabs	8/12/2025, 12:08 AM	Classic	✓
Approvals	Approvals	Manage approvals and approval flows	8/12/2025, 12:08 AM	Lightning	✓
Automation	FlowsApp	Automate business processes and repetitive tasks.	8/12/2025, 12:12 AM	Lightning	✓
Bolt Solutions	Lightningbolt	Discover and manage business solutions designed for your industry.	8/12/2025, 12:08 AM	Lightning	✓
Community	Community	Salesforce CRM Communities	8/12/2025, 12:08 AM	Classic	✓
Content	Content	Salesforce CRM Content	8/12/2025, 12:08 AM	Classic	✓
Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	8/12/2025, 12:08 AM	Lightning	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	8/12/2025, 12:08 AM	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	8/12/2025, 12:08 AM	Lightning	✓
Jewellery Inventory System	Jewellery_Inventory_System	Elevate your look with elegance	8/24/2025, 11:35 PM	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	8/12/2025, 12:08 AM	Lightning	✓
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	8/12/2025, 12:08 AM	Classic	✓
My Service Journey	MSJApp	Discover new customer service capabilities.	8/12/2025, 12:08 AM	Lightning	✓

Creating Fields For Objects:

Create the fields for the Objects created.

The screenshot shows the Salesforce Object Manager interface for the 'Item' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main content area is titled 'Fields & Relationships' and displays 24 items sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Key fields shown include Amount, Created By, Customer Name, Customer Order, Expected Days Of Return, Gold Price, Item Id, Item Type, KDM, and Last Modified By.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Customer Name	Customer_Name__c	Lookup(Jewel Customer)		✓
Customer Order	Customer_Order__c	Picklist		
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)		

The screenshot shows the Salesforce Object Manager interface for the 'Billing' object. The left sidebar lists various setup options. The main content area is titled 'Fields & Relationships' and displays 17 items sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Key fields shown include Amount, Billing Id, Created By, Customer Order, Gold/Silver Price, Item, KDM Charge, Last Modified By, Making Charges, and Ornament.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Billing Id	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Customer Order	Customer_Order__c	Lookup(Customer Order)		✓
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)		

SETUP > OBJECT MANAGER
Jewel Customer

Fields & Relationships

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)		

Creating Profiles:

Create two profiles Gold Smith and Work Profiles

profiles

Profile
Gold Smith

Profile Detail

Name	Gold Smith	Edit	Clone	Delete	View Users
User License	Salesforce	Custom Profile <input checked="" type="checkbox"/>			
Description					
Created By	Saravanan_P	8/25/2025, 2:24 AM	Modified By	Saravanan_P 8/25/2025, 9:31 AM	

Page Layouts

Standard Object Layouts	Global	Location Group Assignment	Location Group Assignment Layout
Email Application	Not Assigned [View Assignment]	Macro	Macro Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Account	Account Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Order	Order Layout [View Assignment]

Profile Worker

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Principal Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail	
Name	Worker
User License	Salesforce Platform
Description	
Created By	Saravanan P 8/25/2025, 2:29 AM
Modified By	Saravanan P 8/25/2025, 9:31 AM

Page Layouts

Standard Object Layouts	Global	Lead
Email Application	Global Layout [View Assignment]	Not Assigned [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Location Layout [View Assignment]
Account	Account Layout [View Assignment]	Location Group Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Location Group Assignment Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Object Milestone Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Operating Hours Layout [View Assignment]
		Order Layout [View Assignment]

Creating Roles:

Create roles for Gold Smith And Worker

roles

Collapsible Tree View:

- Sri Krishna Adithya Collage Of Arts And Science
 - CEO**: Edit | Del | Assign
 - CFO**: Edit | Del | Assign
 - Add Role**
 - COO**: Edit | Del | Assign
 - Add Role**
 - Gold Smith**: Edit | Del | Assign
 - Worker**: Edit | Del | Assign
 - Add Role**
 - SVP_Customer Service & Support**: Edit | Del | Assign
 - Add Role**
 - Customer Support, International**: Edit | Del | Assign
 - Add Role**
 - Customer Support, North America**: Edit | Del | Assign
 - Add Role**
 - Installation & Repair Services**: Edit | Del | Assign
 - Add Role**
 - SVP_Human Resources**: Edit | Del | Assign
 - Add Role**
 - SVP_Sales & Marketing**: Edit | Del | Assign
 - VP_International Sales**: Edit | Del | Assign
 - Add Role**
 - VP_Marketing**: Edit | Del | Assign
 - Add Role**

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

Creating Users:

Create users with Gold Smith and Worker Profiles

SETUP  Users

User Niklaus Mikaelson  User ProfileHelp for this Page 

Permission Set Assignments  Activation Required  Permission Set Group Assignments  Permission Set License Assignments  Personal Groups  Public Group Membership  Queue Membership  Team  Managers in the Role Hierarchy  OAuth Apps  Third-Party Account Links  Built-in Authenticators  Installed Mobile Apps  Authentication Settings for External Systems  Login History  User Provisioning Accounts 

User Detail		Edit	Sharing	Reset Password	Freeze	View Summary
Name	Niklaus Mikaelson	Role	Gold Smith			
Alias	nmika	User License	Salesforce			
Email	saravanan501avm@gmail.com 	Profile	Gold Smith			
Username	saravanan@amsaravanan.social	Active	<input checked="" type="checkbox"/>			
Nickname	User17561145981515565217 	Marketing User	<input type="checkbox"/>			
Title		Offline User	<input type="checkbox"/>			
Company		Knowledge User	<input type="checkbox"/>			
Department		Flow User	<input type="checkbox"/>			
Division		Service Cloud User	<input type="checkbox"/>			
Address		Site.com Contributor User	<input type="checkbox"/>			
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>			
Locale	English (United States)	WDC User	<input type="checkbox"/>			
Language	English	Mobile Push Registrations	View			
Delegated Approver		Data.com User Type				
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> 			
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> 			
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> 			
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> 			

SETUP  Users

User Kol Mikaelson  User ProfileHelp for this Page 

Permission Set Assignments  Activation Required  Permission Set Group Assignments  Permission Set License Assignments  Personal Groups  Public Group Membership  Queue Membership  Team  Managers in the Role Hierarchy  OAuth Apps  Third-Party Account Links  Built-in Authenticators  Installed Mobile Apps  Authentication Settings for External Systems  Login History  User Provisioning Accounts 

User Detail		Edit	Sharing	Reset Password	Freeze	View Summary
Name	Kol Mikaelson	Role	Worker			
Alias	kmika	User License	Salesforce Platform			
Email	saravanan501avm@gmail.com 	Profile	Worker			
Username	saravanan2@amsaravanan.social	Active	<input checked="" type="checkbox"/>			
Nickname	User17561149675384119498 	Marketing User	<input type="checkbox"/>			
Title		Offline User	<input type="checkbox"/>			
Company		Knowledge User	<input type="checkbox"/>			
Department		Flow User	<input type="checkbox"/>			
Division		Service Cloud User	<input type="checkbox"/>			
Address		Site.com Contributor User	<input type="checkbox"/>			
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>			
Locale	English (United States)	WDC User	<input type="checkbox"/>			
Language	English	Mobile Push Registrations	View			
Delegated Approver		Data.com User Type				
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> 			
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> 			
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> 			
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> 			

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with navigation links like 'Setup', 'Home', 'Object Manager', and sections for 'Users' (Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings), 'Feature Settings' (Data.com, Prospector Users), and a search bar. The main content area is titled 'User' and shows 'Sanjeev Kumar'. It includes tabs for 'Permission Set Assignments' (with 1 item), 'Activation Required', 'Permission Set Group Assignments', 'Permission Set License Assignments', 'Personal Groups', 'Public Group Membership', and 'Queue Membership'. Below this, there's a table for 'Permission Set Assignments' with one row for 'Per to Worker' assigned on 8/25/2025. The right side of the page has a 'User ProfileHelp for this Page' link and a 'Permission Set Assignments Help' link.

Creating Page Layout:

Create Page Layout for Gold and Silver

The screenshot shows the Salesforce Setup interface under 'OBJECT MANAGER'. The left sidebar lists various settings like 'Details', 'Fields & Relationships', 'Page Layouts' (which is selected), '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 main content area is titled 'Page Layout for Gold'. It includes a toolbar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. A 'Fields' panel lists 'Buttons', 'Quick Actions', 'Mobile & Lightning Actions', 'Expanded Lookups', 'Related Lists', and 'Report Charts'. A 'Fields' grid shows columns for 'Section', 'Customer Name', 'Item Id', 'Making Charges', 'Prices', 'Record Type', and 'Total Weight'. Rows include 'Blank Space', 'Customer Order', 'Item Type', 'Ornament', 'Priority', 'Silver Price', and 'Weight'; 'Amount', 'Expected Days Of...', 'KDM', 'Owner', 'Purity', 'Stone/Other Price'; and 'Created By', 'Gold Price', 'Last Modified By', 'Percentage', 'Purity Gold Price', and 'Stone Weight'. Below the grid are sections for 'Item Sample', 'Highlights Panel' (with a note to customize), 'Quick Actions in the Salesforce Classic Publisher' (with a note about overriding global publisher layout), 'Salesforce Mobile and Lightning Experience Actions' (with a note about predefined actions), and 'Item Detail' (with buttons for 'Standard Buttons' and 'Custom Buttons').

SETUP > OBJECT MANAGER

Item

Creating Record Types:

Create record types for Gold and Silver

SETUP > OBJECT MANAGER

Item

SETUP > OBJECT MANAGER

Item

Record Type
Silver

« Back to Custom Object: Item

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

Record Type Label	Silver	Active
Record Type Name	Silver	<input checked="" type="checkbox"/>
Namespace Prefix		
Description	Silver items information	
Created By	Saravanan_P 8/25/2025, 6:55 AM	Modified By Saravanan_P 8/25/2025, 6:55 AM

Picklists Available for Editing

Action	Field	Modified Date
Edit	Customer Order	8/25/2025, 6:55 AM
Edit	Expected Days Of Return	8/25/2025, 6:55 AM
Edit	Item Type	8/25/2025, 6:55 AM
Edit	Priority	8/25/2025, 6:55 AM

Creating Permission Sets:

Create a Permission Set named Per to Worker

Permis

SETUP

Permission Sets

Permission Set
Per to Worker

Find Settings... | Clone | Edit Properties | Manage Assignments | View Summary

Permission Set Overview

Description	API Name	Namespace Prefix
License	Per_to_Worker	
Session Activation Required	<input type="checkbox"/>	
Permission Set Groups Added To	0	
Created By	Saravanan_P 8/25/2025, 6:57 AM	
Last Modified By	Saravanan_P 8/25/2025, 6:58 AM	

Apps

- Assigned Apps
- Assigned Connected Apps
- Object Settings
- App Permissions
- Apex Class Access
- Visualforce Page Access
- External Data Source Access
- Flow Access

Creating Trigger:

Create a Trigger handler class and a Trigger

The screenshot shows the Salesforce IDE interface with the code editor open. The file is named `UpdatePaidAmountTriggerHandler.apxc`. The code defines a class `UpdatePaidAmountTriggerHandler` with two static methods: `handleBeforeInsert` and `handleBeforeUpdate`. The `handleBeforeInsert` method iterates through a list of `Billing__c` objects and sets the `Paid_Amount__c` field to the `Paying_Amount__c` field. The `handleBeforeUpdate` method iterates through a list of `Billing__c` objects, retrieves the old record from a map, and calculates the difference between the old `Paid_Amount__c` and the new `Paying_Amount__c`.

```
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;
```

The screenshot shows the Salesforce Developer Console in a browser window. The URL is `orgfarm-c68e6f1d4d-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage`. The code editor displays a trigger definition for the `UpdatePaidAmountTrigger` on the `Billing__c` object, triggered before insert and before update. The trigger calls the `handleBeforeInsert` and `handleBeforeUpdate` methods of the `UpdatePaidAmountTriggerHandler` class.

```
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);
    }
}
```

Creating Report:

Create a new Report in the Report Tab

The screenshot shows the 'Reports' tab in a software application. On the left, there is a sidebar with categories: 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'Folders', 'All Folders', 'Created by Me', 'Shared with Me', 'Favorites', and 'All Favorites'. The main area displays a table of recent reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. There are four items listed:

Report Name	Description	Folder	Created By	Created On	Subscribed
New Item with Billings Report		Private Reports	Saravanan P	8/25/2025, 9:34 AM	
New Prices Report		Private Reports	Saravanan P	8/25/2025, 8:19 AM	
New Report		Private Reports	Saravanan P	8/25/2025, 9:35 AM	

Creating Dashboard:

Create Dashboard from Dashboard Tab

The screenshot shows the 'Reports' tab in a software application. The sidebar on the left is identical to the previous one. The main area displays a table of recent reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. There are four items listed:

Report Name	Description	Folder	Created By	Created On	Subscribed
New Item with Billings Report		Private Reports	Saravanan P	8/25/2025, 9:34 AM	
New Prices Report		Private Reports	Saravanan P	8/25/2025, 8:19 AM	
New Report		Private Reports	Saravanan P	8/25/2025, 9:35 AM	

Creating a Flow:

Create a triggered Flow

The screenshot shows the Salesforce Setup interface with the 'Flows' tab selected. On the left, there's a sidebar with 'Process Automation' sections for 'Flows' and 'Identity'. A search bar at the top has 'flows' typed into it. The main area is titled 'Triggered Flows' and contains a table with five rows of flow definitions. The columns include 'Flow Label', 'Triggering Object', 'Trigger', 'Actions', 'Last Modified', 'Last Modified By', 'Type', 'Package State', and 'Paused'. The flows listed are: 'Create Order Summary Flow' (Order, Record—Run After Save), 'Create Process Exception Flow' (Process Exception Event, Platform Event), 'Email' (Billing, Record—Run After Save), 'Enablement: Send Feedback Ready Notification' (SurveyResponse, Record—Run After Save), and 'RMA Create Credit Memo and Ensure Refunds Flow' (Return Order, Record—Run After Save). Most flows have 'Managed-Installed' package state and are not paused.

3.Result:

Jewel Customer Tab:

The screenshot shows the 'Jewel Customers' tab in the 'Jewelry Inventory' application. The top navigation bar includes 'Jewellery Inventory ...' and 'Jewel Customers'. The main area is titled 'Recently Viewed' and lists 13 items, all labeled 'Customer name'. The names listed are: Saravanan, Saravanan, yogaraj, rishi, santhosh, varsath, ashwin, nithish, srisanth, vignesh, sanjay, sanjeev, and Saravanan. Each name is preceded by a small checkbox. The interface includes standard Salesforce navigation and search tools.

Adding New Jewel Customer:

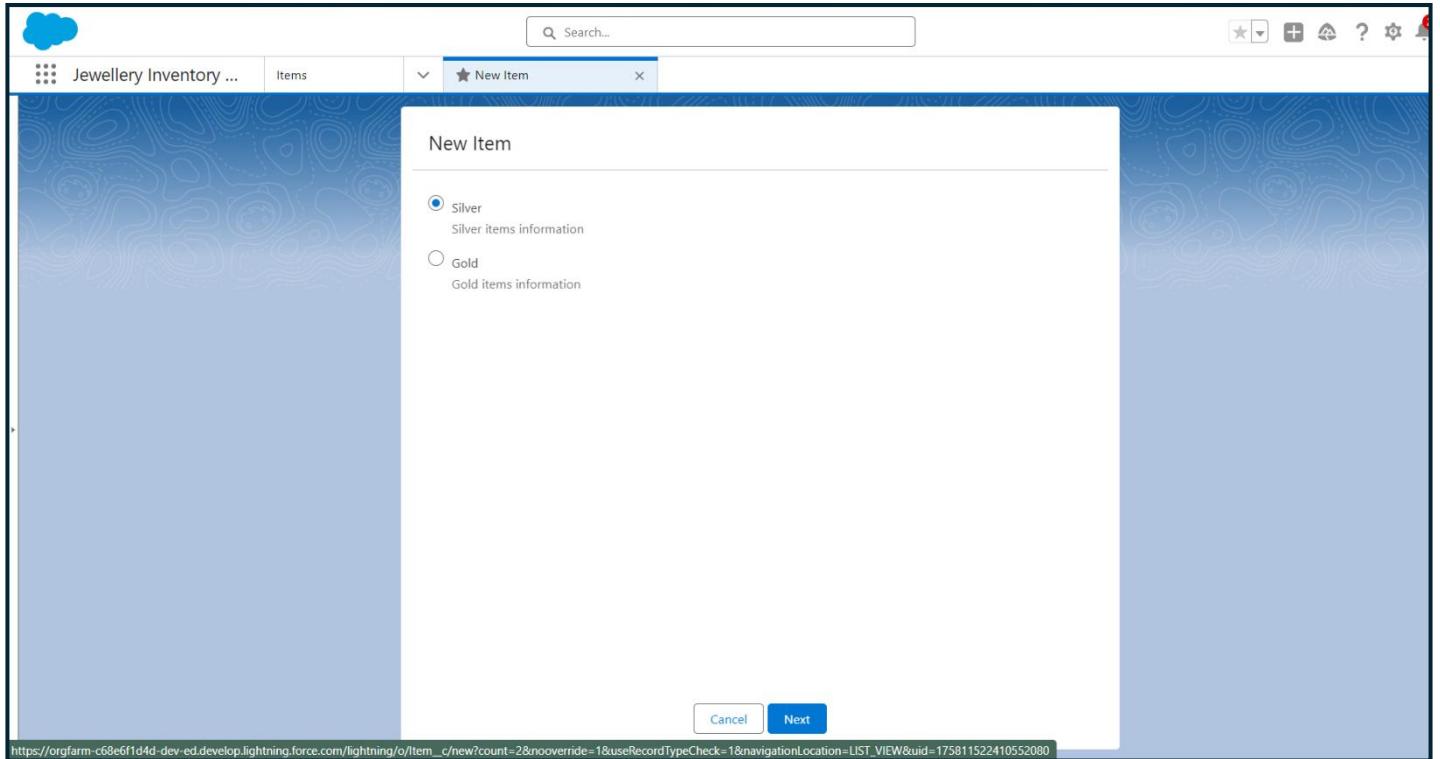
The screenshot shows a web-based form titled "New Jewel Customer". At the top right of the form, there is a note: "* = Required Information". The form has a section labeled "Information" containing fields for "Customer name" (with a required indicator), "City", "Phone", "Email", "State", "Street", "Country", and "Zip/Postal code". To the right of the "Customer name" field, there is an "Owner" section showing a profile picture of "Saravanan P". At the bottom of the form are three buttons: "Cancel", "Save & New", and "Save". The background of the page features a blue and white topographic map pattern.

Items Tab:

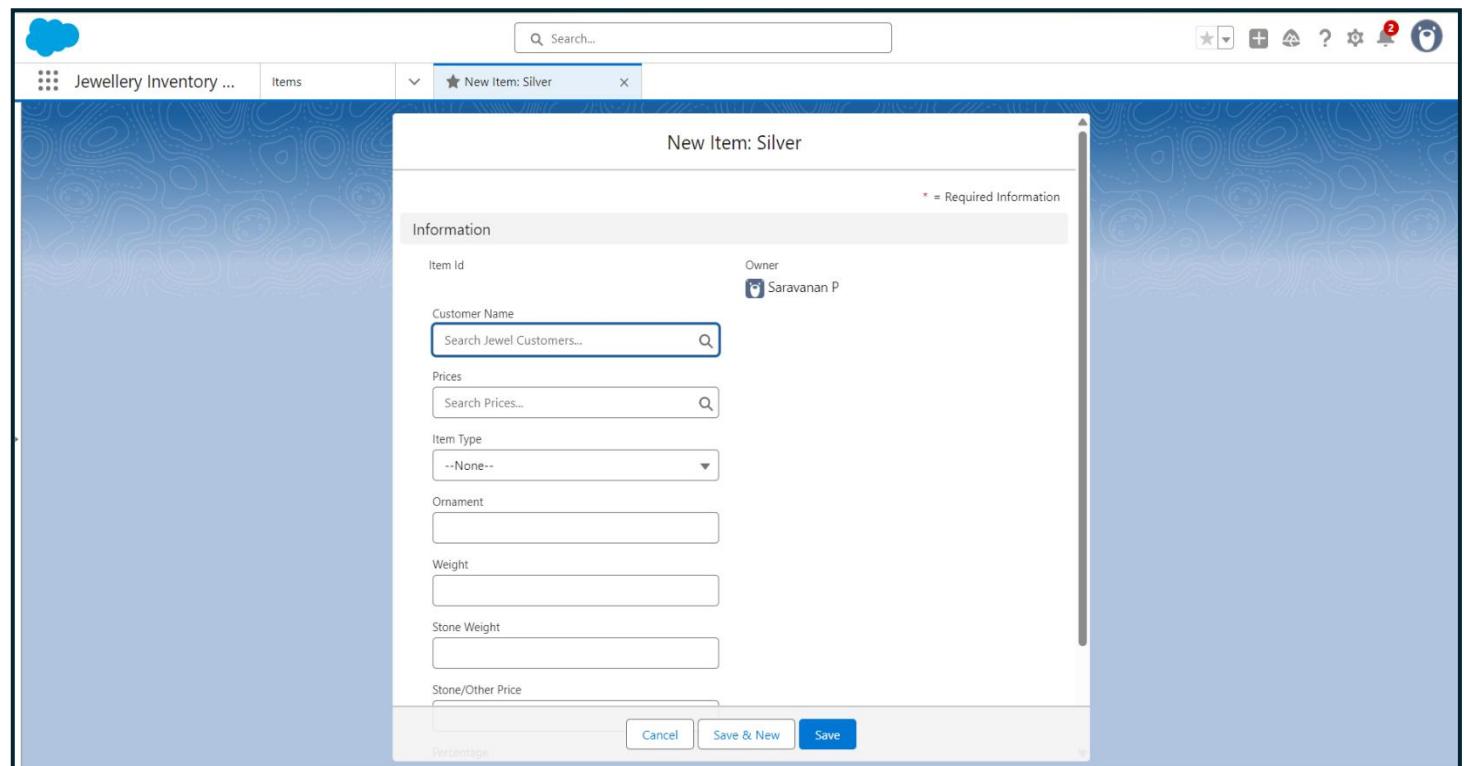
The screenshot shows a list of items under the "Items" tab. At the top left, there is a "Recently Viewed" section with a dropdown arrow and a refresh icon. To the right of this are buttons for "New", "Import", "Change Owner", and "Assign Label". Below this is a search bar with the placeholder "Search this list..." and various filter icons. The main list displays 10 items, each with a checkbox and an "Item Id":

	Item Id
1	Item-10
2	Item-09
3	Item-08
4	Item-07
5	Item-06
6	Item-05
7	Item-04
8	Item-03
9	Item-02
10	Item-01

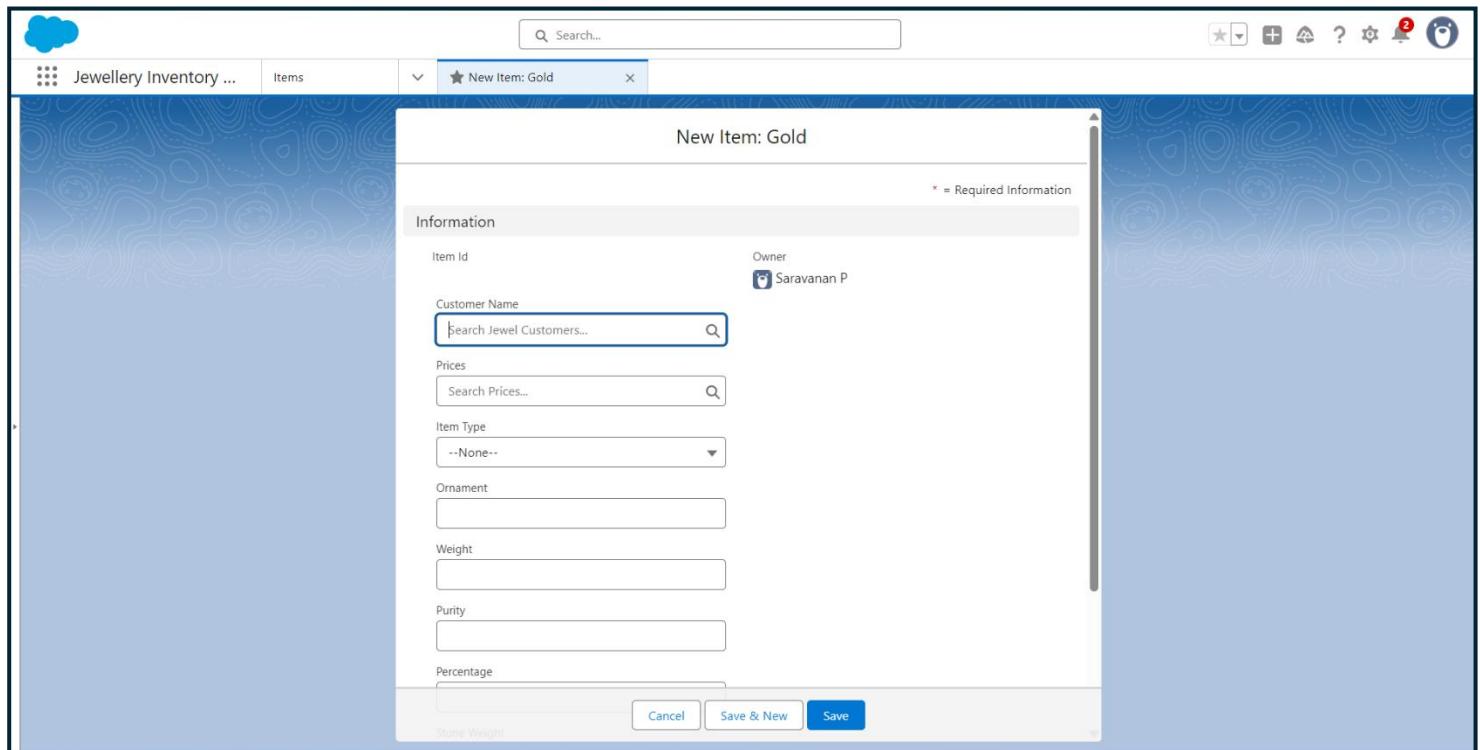
Adding New Items:



Adding New Items For Silver:



Adding New Items For Silver:



Customer Orders Tab:

The screenshot shows the 'Customer Orders' tab in the 'Jewellery Inventory' application. It displays a list of 'Recently Viewed' orders numbered 1 to 12, each with a checkbox next to the Order Id. The interface includes a search bar, a 'Recently Viewed' dropdown, and various action buttons like New, Import, and Assign Label.

Order Id	Order
1	Order-011
2	Order-012
3	Order-010
4	Order-009
5	Order-008
6	Order-007
7	Order-006
8	Order-005
9	Order-004
10	Order-003
11	Order-002
12	Order-001

Adding New Customer Orders:

The screenshot shows the Salesforce Lightning interface for the Customer Orders list. The top navigation bar includes a cloud icon, a search bar, and various global actions like New, Import, and Assign Label. The main area displays a list of 12 recently viewed orders, each with a checkbox and a link to 'Order-011'. A sidebar on the left shows a 'Recently Viewed' dropdown menu. A search bar at the bottom allows filtering the list.

The screenshot shows the details of a specific customer order, Order-011. The top navigation bar includes a cloud icon, a search bar, and global actions like New Contact, Edit, and New Opportunity. The main area displays the 'Details' tab for the order, showing fields such as Order Id (Order-011), Jewel Customer (Saravanan), Item (Item-10), and Order Status (On Hold). It also shows the last modified by Saravanan P. on 9/5/2025, 2:31 AM. A related section is visible on the left.

Prices Tab:

The screenshot shows the 'Prices' tab in a 'Jewellery Inventory ...' application. The top navigation bar includes a search bar and various icons. Below the navigation, a 'Recently Viewed' section lists 10 items, each with a checkbox and a price ID: 1. Price-010, 2. Price-003, 3. Price-009, 4. Price-008, 5. Price-007, 6. Price-006, 7. Price-005, 8. Price-004, 9. Price-002, and 10. Price-001. A 'New' button is located in the top right corner of the main content area.

Adding New Price:

The screenshot shows a 'New Price' dialog box overlaid on a 'Jewellery Inventory ...' application window. The dialog has a 'New Price' title bar and a 'Required Information' note. It contains two input fields: 'Gold Price' and 'Silver Price'. The 'Owner' field is populated with 'Saravanan P'. At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.

The screenshot shows a Salesforce Lightning interface for a 'Price' record. The top navigation bar includes a cloud icon, a search bar, and various global buttons. The main header displays 'Jewellery Inventory ...' and 'Prices'. The current tab is 'Price-010 | Price'. The record detail view for 'Price-010' is shown, with tabs for 'Related' and 'Details'. The 'Details' tab is active, showing fields like 'Price Id' (Price-010), 'Gold Price' (\$34,245), 'Silver Price' (\$2,423.00000), and 'Created By' (Saravanan P). The 'Owner' field is also populated with Saravanan P. A large blue sidebar on the right contains a map-like graphic. The URL in the browser is https://orgfarm-c68e6f1d4d-dev-ed.develop.lightning.force.com/lightning/v/Price_c/a03ql00000AeRLWQA3/view.

Billing Tab:

The screenshot shows a Salesforce Lightning interface for the 'Billing__c' list view. The top navigation bar and header are identical to the previous screenshot. The main area displays a list of 10 items under the heading 'Recently Viewed'. Each item is represented by a checkbox followed by the 'Billing Id' (e.g., BILL-007, BILL-008, etc.). The list view includes standard Salesforce controls at the top right, such as 'New', 'Import', 'Change Owner', and 'Assign Label'. The URL in the browser is https://orgfarm-c68e6f1d4d-dev-ed.develop.lightning.force.com/lightning/o/Billing__c/list?filterName=_Recent.

Adding New Billing:

The screenshot shows a software interface for adding a new billing entry. The window title is "New Billing". At the top right, there is a note: "* = Required Information". The main section is titled "Information". It contains the following fields:

- Billing Id: A text input field containing "Bill-007".
- Owner: A dropdown menu showing "Saravanan P".
- Item: A search bar with placeholder text "Search Items..." and a magnifying glass icon.
- Paying Amount: An empty text input field.
- Paid Amount: An empty text input field.
- Customer Order: A search bar with placeholder text "Search Customer Orders..." and a magnifying glass icon.

At the bottom of the form are three buttons: "Cancel", "Save & New", and "Save".

The screenshot shows the details page for the billing entry "Bill-007". The page has a header with a bell icon and the text "Bill-007". On the right, there are buttons for "New Contact", "Edit", and "New Opportunity". The main area is divided into sections:

- Related**: Shows a list of items associated with the bill.
- Details**: Displays various billing components:
 - Billing Id: Bill-007
 - Owner: Saravanan P
 - Item: Item-10 (with edit icon)
 - Ornament: jweleve
 - Stone weight: 22.00
 - Weight: 12.00
 - Amount: \$430.10
 - Gold/Silver Price: \$25.30
 - KDM Charge: \$56
 - Making Charges: \$10,200.00
 - Stones/other price: \$22.00
 - Total amount: \$10,677.40

Reports Tab:

Jewellery Inventory ... Reports

Recent

4 items

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Item with Billings Report		Private Reports	Saravanan P	8/25/2025, 9:34 AM	
Created by Me	New Prices Report		Private Reports	Saravanan P	8/25/2025, 8:19 AM	
Private Reports	New Report		Private Reports	Saravanan P	8/25/2025, 9:35 AM	
Public Reports	New Item with Billings Report		Private Reports	Saravanan P	8/25/2025, 8:29 AM	

REPORTS

- All Reports

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

Creating a Report:

Jewellery Inventory ... Reports Report Builder

Create Report

Category

- Recently Used
- All
- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contracts and Orders
- Price Books, Products and Assets
- Administrative Reports
- File and Content Reports
- Individuals
- Other Reports
- Hidden Report Types

Select a Report Type

Report Type Name Category

Bilings with item and Customer order	Custom
Item with Billings	Custom
Prices	Standard

The screenshot shows a report titled "New Prices Report" from a system named "Jewellery Inventory ...". The report displays 10 total records with the following summary statistics:

Total Records	Total Gold Price	Total Silver Price
10	\$641,348	\$25,724,895.00000

The main table lists 11 rows of price data:

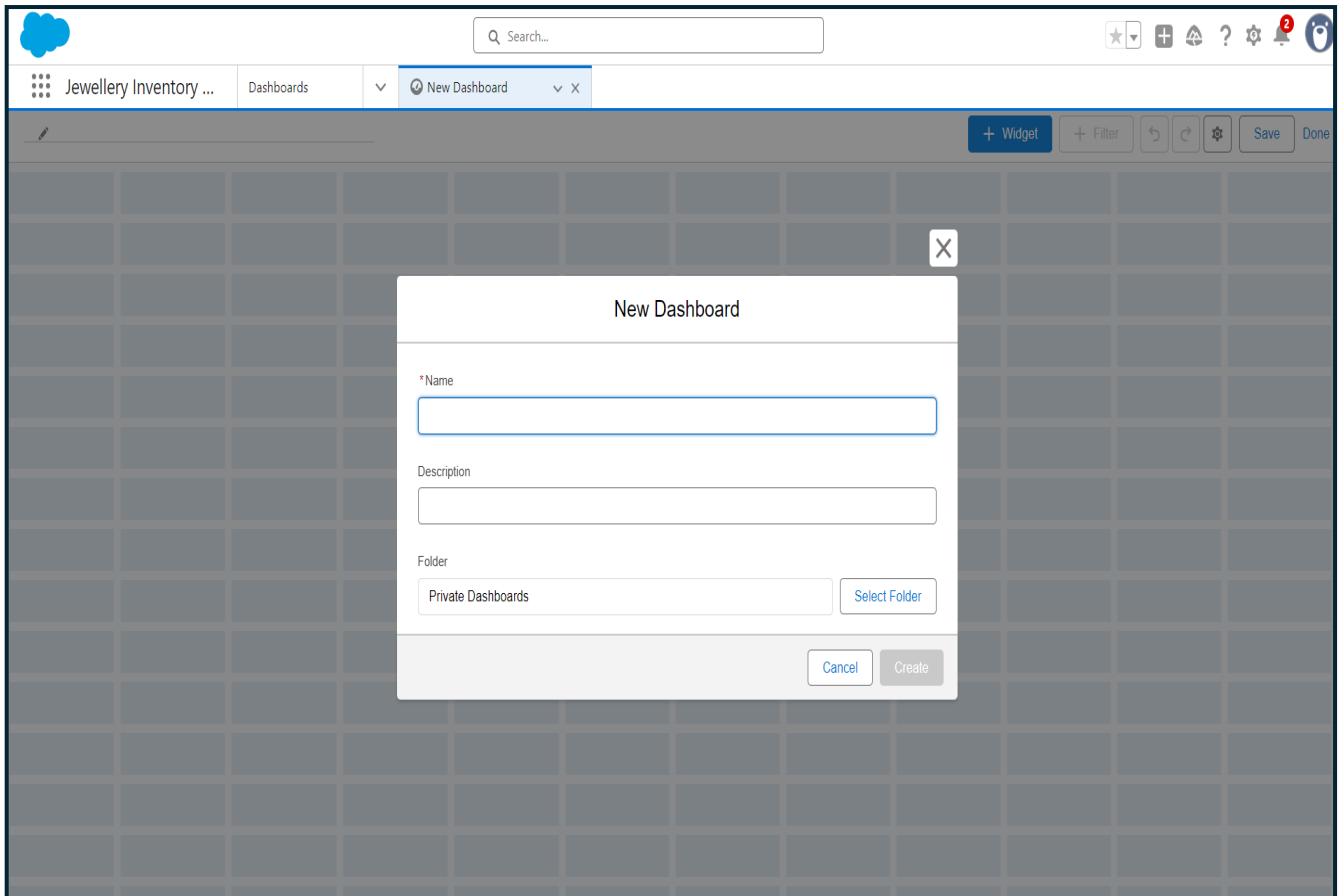
	Price: Price Id	Gold Price	Silver Price
1	Price-003	\$555	\$333.00000
2	Price-009	\$13,241	\$1,341.00000
3	Price-007	\$253	\$232.00000
4	Price-005	\$45,234	\$23,354,324.00000
5	Price-010	\$34,245	\$2,423.00000
6	Price-001	\$22	\$333.00000
7	Price-002	\$422	\$532.00000
8	Price-004	\$523,532	\$2,351,531.00000
9	Price-006	\$23,523	\$322.00000
10	Price-008	\$321	\$13,524.00000
11		\$641,348	\$25,724,895.00000

Dashboard Tab:

The screenshot shows the "Dashboards" tab within the "Jewellery Inventory ..." application. The sidebar on the left lists categories such as Dashboards, Recent, Private Dashboards, All Dashboards, Folders, All Folders, Created by Me, Shared with Me, Favorites, and All Favorites. The main area displays a table of recent dashboards:

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Dashboard 1	Private Dashboards	Saravanan P	8/25/2025, 9:37 AM		
Created by Me	Dashboard 2	Private Dashboards	Saravanan P	8/25/2025, 9:39 AM		

Adding A New Dashboard:



The screenshot shows the Salesforce Lightning interface displaying a dashboard named 'Dashboard 1'. The header includes the blue cloud icon, a search bar, and global actions. The dashboard title is 'Dashboard 1' with a refresh, edit, and subscribe button. Below the title, it says 'As of Sep 17, 2025, 6:42 AM' and 'Viewing as Saravanan P'. The main content area features a report titled 'New Prices Report'. The report table has columns: 'Price: Price Id ↑', 'Gold Price', and 'Silver Price'. The data rows are: Price-001 (\$22, \$333.00000), Price-002 (\$422, \$532.00000), Price-003 (\$555, \$333.00000), Price-004 (\$524k, \$2.35153M), Price-005 (\$45k, \$23.35432M), Price-006 (\$24k, \$322.00000), and Price-007 (\$253, \$232.00000). At the bottom of the report, there are links 'View Report (New Prices Report)' and 'As of Sep 17, 2025, 6:42 AM'. The background of the dashboard has a decorative wavy pattern.

4.Conclusion:

In conclusion, this project successfully leverages the power of the Salesforce platform to deliver a robust and scalable business solution. Through the thoughtful implementation of custom objects, automated processes via Flows, and insightful analytics with Reports and Dashboards, the application effectively addresses the core challenges of jewel inventory and customer management. This system stands as a testament to the platform's versatility, providing a solid foundation that is both highly functional today and easily extensible to meet future business demands.

5. Appendix:

Source Code: Provided in Apex Trigger And Handler

UpdatePaidAmountTrigger.apxt

```
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);  
    }  
}
```

UpdatePaidAmountTriggerHandler.apxt

```
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;  
        }  
    }  
}
```