

CRM Application for Jewel Management - (Developer)

Collage Name: Sri Krishna Adithya Collage Of Arts And Science

Collage Code: BRUAG

Team ID: NM2025TMID22557

Team Leader Name: Saravanan P

E-mail: 23bscs252saravananp@skacas.ac.in

Team Member 1: Santhosh S

E-mail: 23bscs251santhoshhs@skacas.ac.in

Team Member 2: Shalik S

E-mail: 23bscs253shaliks@skacas.ac.in

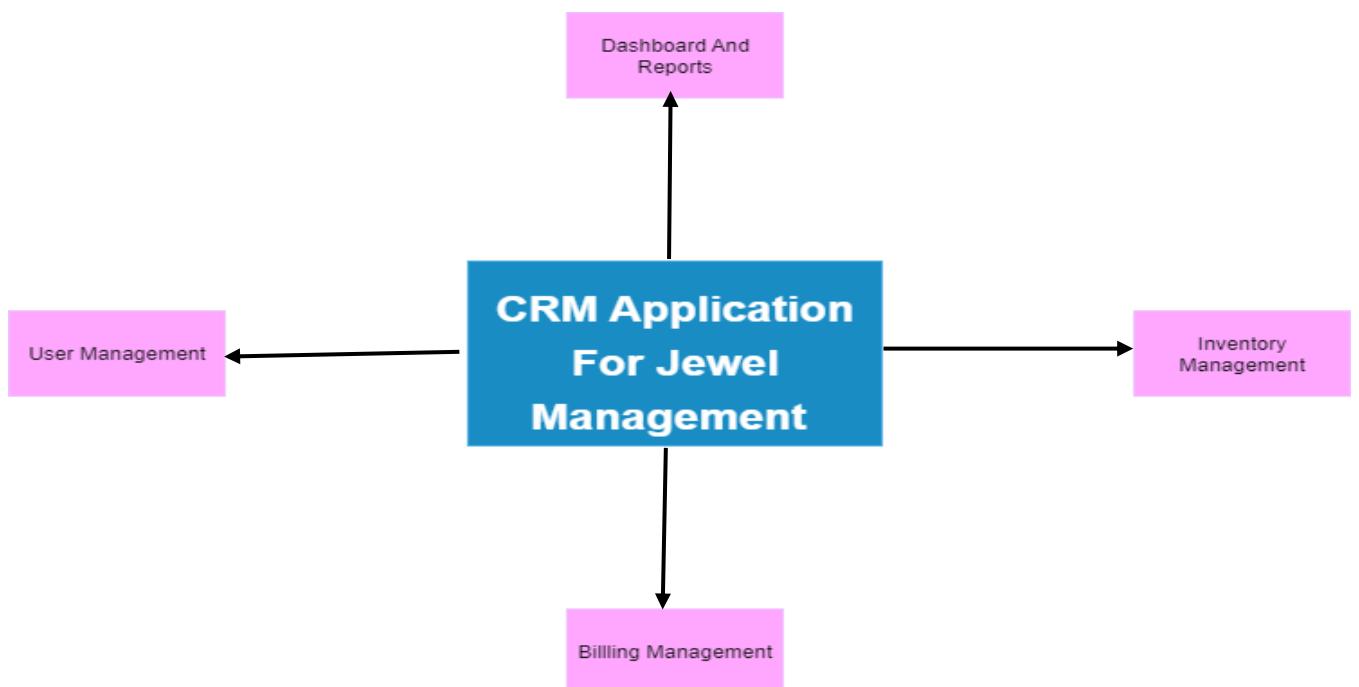
Team Member 3: Shamsudeen M R

E-mail: 23bscs254shamsudeenmr@skacas.ac.in

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

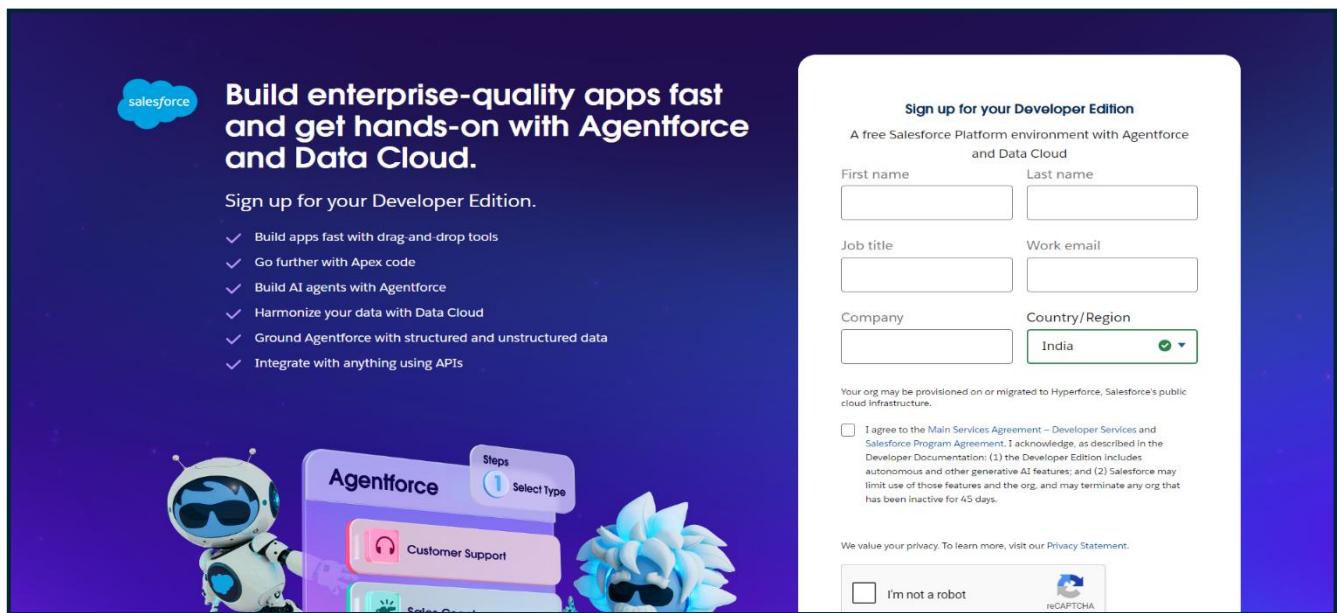
The purpose of the Jewel Inventory and CRM System is to provide a comprehensive and efficient software solution for a jewelry business. It's designed to solve the common challenges faced by jewelers, such as manual inventory tracking, disorganized customer data, and disconnected sales processes.

2. Development Phase:

Creating Developer Account:

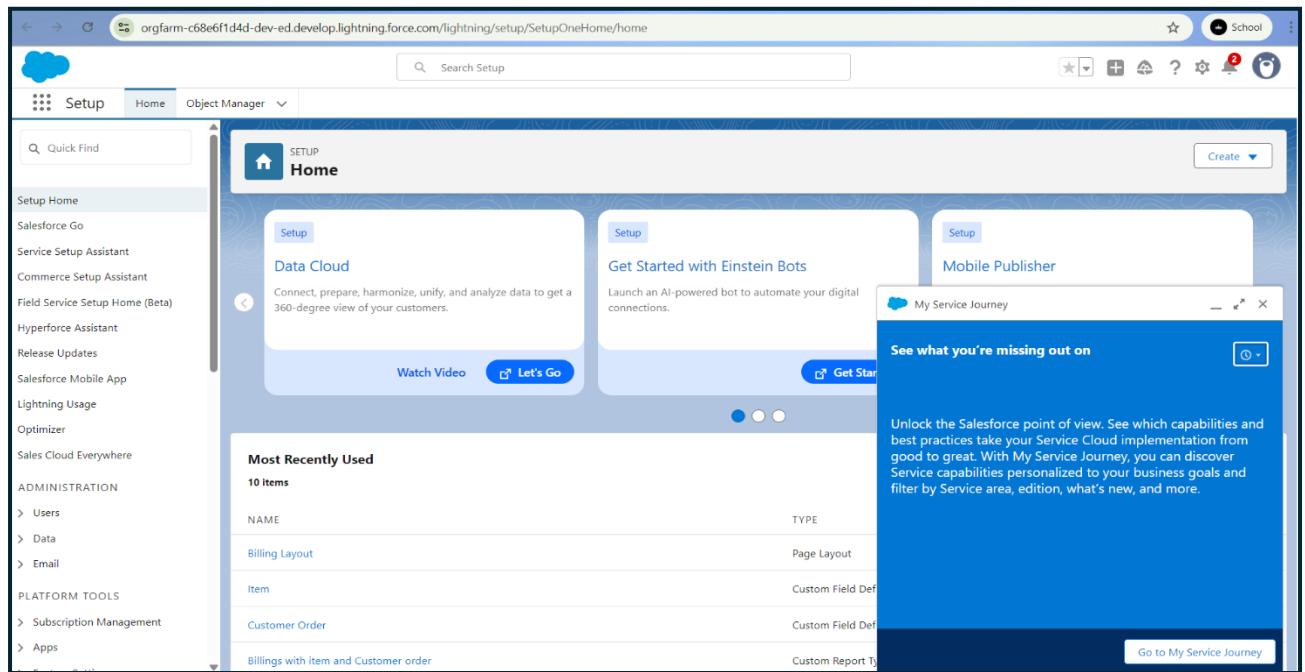
Creating a developer org in salesforce.

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



Account Activation:

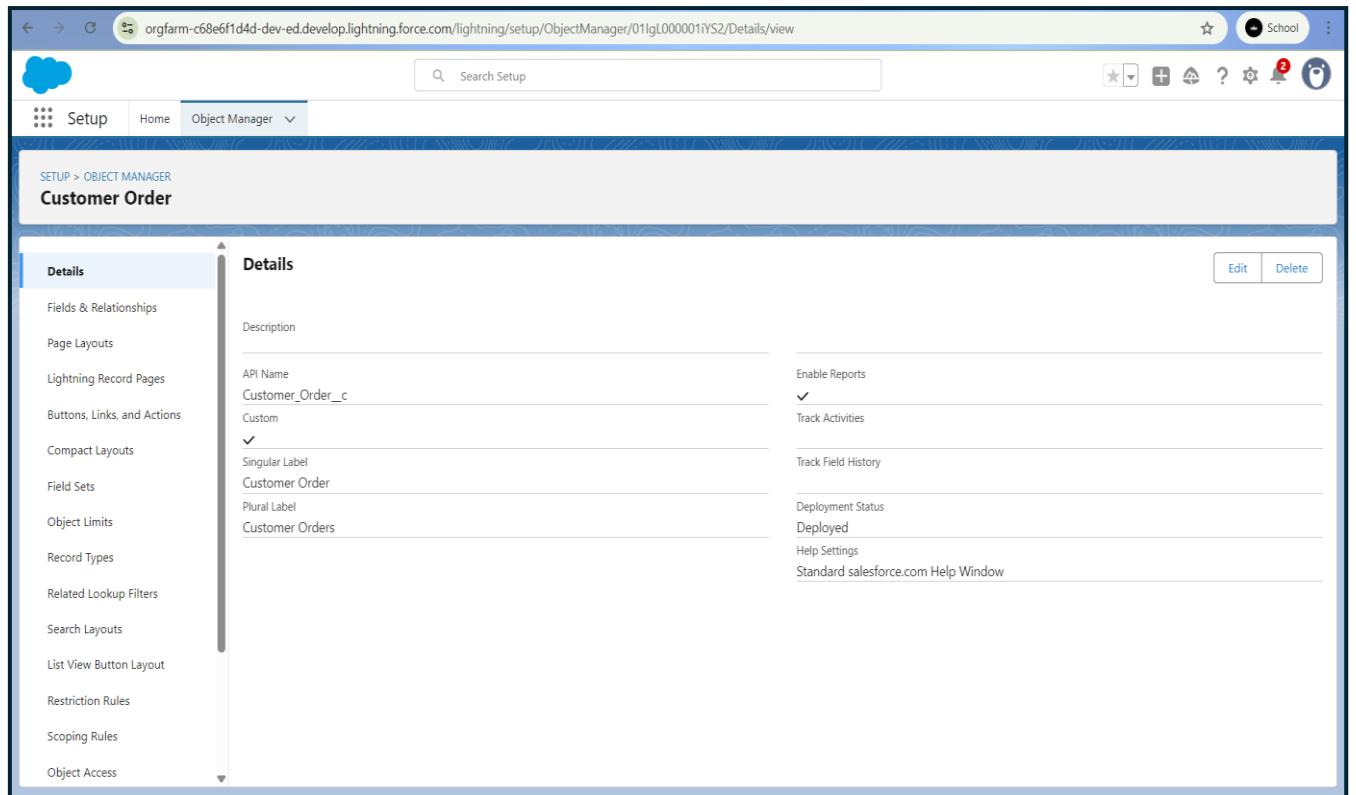
Go to the inbox of the email that you used while signing up. Click on the Reset Password to activate your account. The email may take 5-10mins.



Create Jewel Customer Object:

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

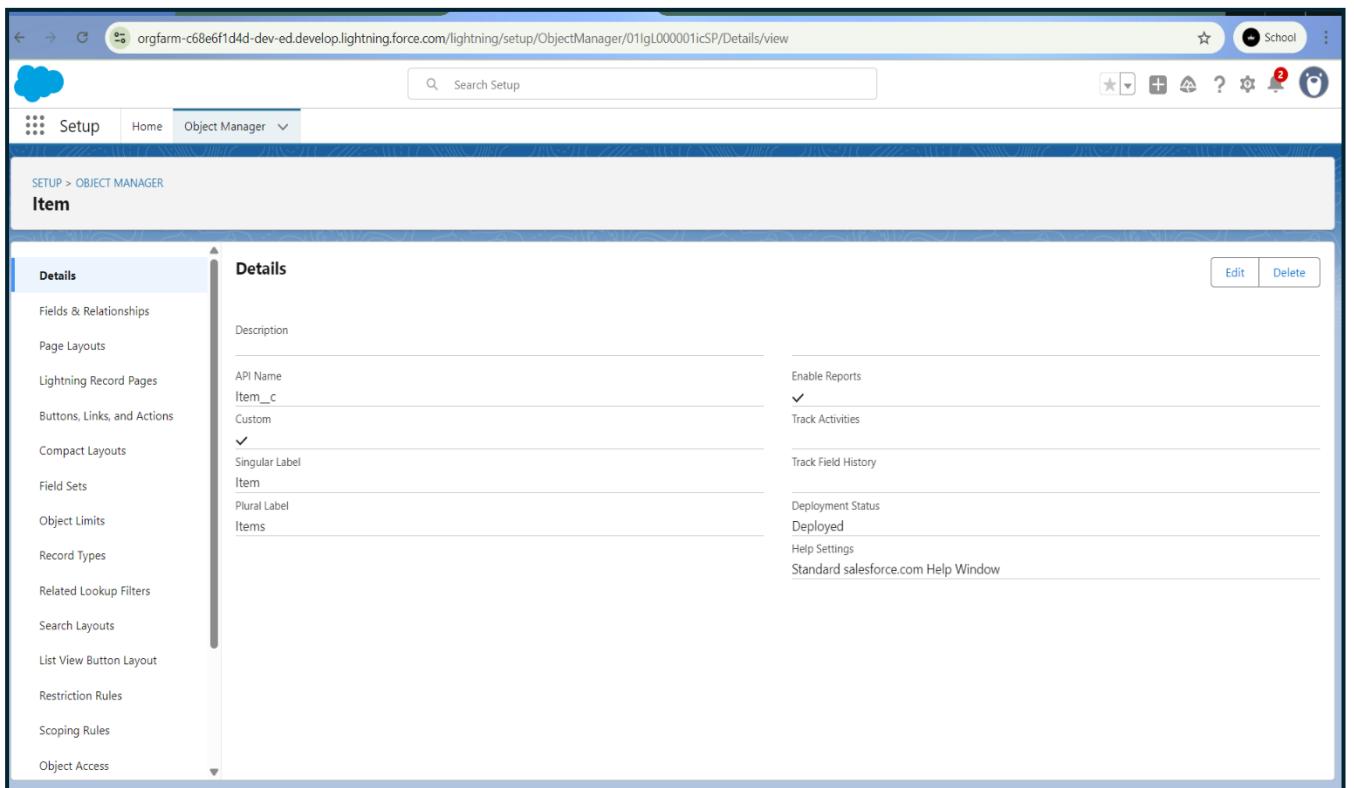
Common Name	Content	Type
Contract	Contract	Standard Object
Contract Line Item	ContractLineItem	Standard Object
Coupon	Coupon	Standard Object
Credential Stuffing Event Store	CredentialStuffingEventStore	Standard Object
Credit Memo	CreditMemo	Standard Object
Credit Memo Invoice Application	CreditMemoinvApplication	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



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 content area is titled 'Details' and contains the following fields:

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 content area are 'Edit' and 'Delete' buttons.



The screenshot shows the Salesforce Object Manager interface for the 'Item' 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 content area is titled 'Details' and contains the following fields:

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 content area are 'Edit' and 'Delete' buttons.

The screenshot shows the Salesforce Object Manager interface for the 'Billing' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Billing'. On the left, a sidebar lists various configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions (which is 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 content area is titled 'Details' and contains 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

At the bottom right of the details section are 'Edit' and 'Delete' buttons.

The screenshot shows the Salesforce Object Manager interface for the 'Jewel_Customer' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Jewel Customer'. On the left, a sidebar lists various configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions (which is 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 content area is titled 'Details' and contains 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

At the bottom right of the details section are 'Edit' and 'Delete' buttons.

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 the tab name is a note: 'Below is the information for the custom tab. Click Edit to change the custom tab.' A 'Custom Tab Definition Detail' table is shown with the following data:

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

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 the tab name is a note: 'Below is the information for the custom tab. Click Edit to change the custom tab.' A 'Custom Tab Definition Detail' table is shown with the following data:

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

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 row contains the following information:

Tab Label	Items	Tab Style	
Object	Item	Splash Page Custom Link	
Description			
Created By	Saravanan_P 8/24/2025, 11:26 PM	Modified By	Saravanan_P 8/24/2025, 11:26 PM

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 row contains the following information:

Tab Label	Jewel Customers	Tab Style	
Object	Jewel Customer	Splash Page Custom Link	
Description			
Created By	Saravanan_P 8/24/2025, 11:24 PM	Modified By	Saravanan_P 8/24/2025, 11:24 PM

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. On the left, a 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 includes columns for 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 sidebar lists various setup options. The main content area is titled 'Fields & Relationships' and displays 17 items, sorted by Field Label. The table includes columns for 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

SETUP Profiles

Profile Gold Smith

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.

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

Roles

Sri Krishna Adithya Collage Of Arts And Science

- CEO** Edit | Del | Assign
 - Add Role
 - CFO** Edit | Del | Assign
 - Add Role
 - COO** Edit | Del | Assign
 - Add Role
 - Gold Smith** Edit | Del | Assign
 - Add Role
 - 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
 - Add Role
 - VP_International Sales** Edit | Del | Assign
 - Add Role
 - VP_Marketing** Edit | Del | Assign
 - Add Role

Creating Users:

Create users with Gold Smith and Worker Profiles

The screenshot shows the Salesforce Setup - Users page. A user named "Niklaus Mikaelson" is being created. The "Role" is set to "Gold Smith". Other settings include "User License: Salesforce", "Profile: Gold Smith", and "Active: checked". The "Mobile Push Registrations" section shows "View" selected. The "Data.com User Type" section shows "Accessibility Mode (Classic Only)" with a checked checkbox. The "Load Lightning Pages While Scrolling" checkbox is also checked.

User Detail		Edit Sharing Reset Password Freeze View Summary	
Name	Niklaus Mikaelson	Role	Gold Smith
Alias	nmika	User License	Salesforce
Email	saravanan501avm@gmail.com [Verify] i	Profile	Gold Smith
Username	saravanan@amsaravanan.social	Active	<input checked="" type="checkbox"/>
Nickname	User17561145981515565217 i	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	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> i
App Registration: One-Time Password Authenticator	i	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> i

The screenshot shows the Salesforce Setup - Users page. A user named "Kol Mikaelson" is being created. The "Role" is set to "Worker". Other settings include "User License: Salesforce Platform", "Profile: Worker", and "Active: checked". The "Mobile Push Registrations" section shows "View" selected. The "Data.com User Type" section shows "Accessibility Mode (Classic Only)" with a checked checkbox. The "Load Lightning Pages While Scrolling" checkbox is also checked.

User Detail		Edit Sharing Reset Password Freeze View Summary	
Name	Kol Mikaelson	Role	Worker
Alias	kmika	User License	Salesforce Platform
Email	saravanan501avm@gmail.com [Verify] i	Profile	Worker
Username	saravanan2@amsaravanan.social	Active	<input checked="" type="checkbox"/>
Nickname	User17561149675384119498 i	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	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> i
App Registration: One-Time Password Authenticator	i	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> i

User
Sanjeev Kumar

[Permission Set Assignments \[1\]](#) | [Permission Set Assignments Activation Required](#) | [Permission Set Group Assignments](#) | [Permission Set License Assignments](#) | [Personal Groups](#) | [Public Group Membership](#) | [Queue Membership](#)

Permission Set Assignments

Action	Permission Set Name	Date Assigned	Expires On
Del	Per to Worker	8/25/2025	

[Edit Assignments](#) | [Permission Set Assignments Help](#)

Profile

Alias	skuma	User License	Salesforce Platform
Email	sanjeevkumar@gmail.com [Verify]	Profile	Worker
Username	sanjeevkumarassk@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17561288866332819706	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	[i]
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> [i]
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> [i]
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> [i]
App Registration: One-Time Password Authenticator	[i]	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>

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

Creating Page Layout:

Create Page Layout for Gold and Silver

Page Layout for Gold

Save | Quick Save | Preview As... | Cancel | Undo | Redo | Layout Properties

Fields

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

Item Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher

Actions in this section are currently inherited from the global publisher layout. You can [override the global publisher layout](#) to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning Experience Actions

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Item Detail

SETUP > OBJECT MANAGER

Item

Page Layout for Silver ▾

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

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

Item Sample

Highlights Panel
Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher ⓘ
Actions in this section are currently inherited from the global publisher layout. You can [override the global publisher layout](#) to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning Experience Actions ⓘ
Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Item Detail

Standard Buttons Custom Buttons

Creating Record Types:

Create record types for Gold and Silver

SETUP > OBJECT MANAGER

Item

Record Type
Gold

« Back to Custom Object: Item

Help for this Page ⓘ

Record Type Label: Gold

Record Type Name: Gold

Namespace Prefix:

Description: Gold items information

Created By: Saravanan_P 8/25/2025, 6:53 AM

Active: ✓

Modified By: Saravanan_P 8/25/2025, 6:53 AM

Picklists Available for Editing

Action	Field	Modified Date
Edit	Customer Order	8/25/2025, 6:53 AM
Edit	Expected Days Of Return	8/25/2025, 6:53 AM
Edit	Item Type	8/25/2025, 6:53 AM
Edit	Priority	8/25/2025, 6:53 AM

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

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	

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 implements a trigger handler for the `Billing__c` object. It contains two static methods: `handleBeforeInsert` and `handleBeforeUpdate`. The `handleBeforeInsert` method iterates through a list of new billings and sets the `Paid_Amount__c` field to the `Paying_Amount__c` field. The `handleBeforeUpdate` method iterates through updated billings, retrieves the old billing from a map, and calculates the difference between the old paid amount and the new paying amount to update the paid amount.

```
1 public class UpdatePaidAmountTriggerHandler {
2
3     public static void handleBeforeInsert(List<Billing__c> newBillings) {
4
5         for (Billing__c billing : newBillings) {
6
7             billing.Paid_Amount__c = billing.Paying_Amount__c;
8
9         }
10
11    }
12
13
14
15    public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap, List<Billing__c>
16
17        for (Billing__c billing : updatedBillings) {
18
19            Billing__c oldBilling = oldBillingsMap.get(billing.Id);
20
21            Decimal oldPaidAmount = oldBilling.Paid_Amount__c;
```

The screenshot shows the Salesforce Developer Console in Google Chrome. 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 `UpdatePaidAmountTriggerHandler`. The trigger is defined on the `Billing__c` object, firing before insert and before update. It calls the `handleBeforeInsert` and `handleBeforeUpdate` methods of the trigger handler 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. The left sidebar lists 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. The table contains four rows of data.

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 left sidebar lists 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. The table contains four rows of data.

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.

3.Result:

Jewel Customer Tab:

The screenshot shows a list view titled 'Jewel Customers' under the 'Recently Viewed' section. It displays 13 items, each with a checkbox and a customer name. The names listed are: Saravanan, Saravanan, yogaraj, rishi, santhosh, varsath, ashwin, nithish, srisanth, vignesh, sanjay, sanjeev, and Saravanan. The interface includes standard Salesforce navigation and search tools.

Adding New Jewel Customer:

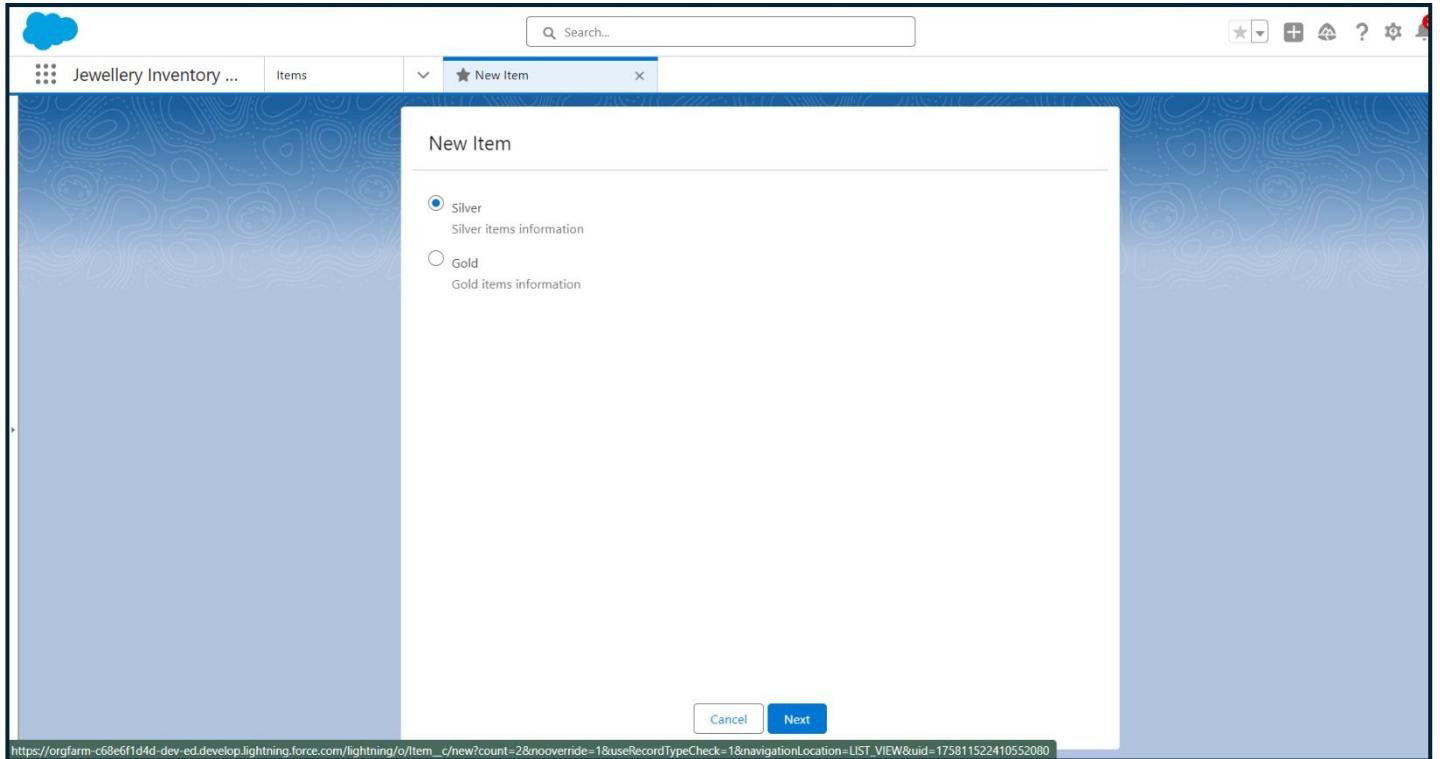
The screenshot shows a web-based form titled "New Jewel Customer". At the top right of the form, there is a note: "* = Required Information". The form has a section labeled "Information" containing fields for "Customer name" (with a required indicator), "City", "Phone", "Email", "State", "Street", "Country", 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:

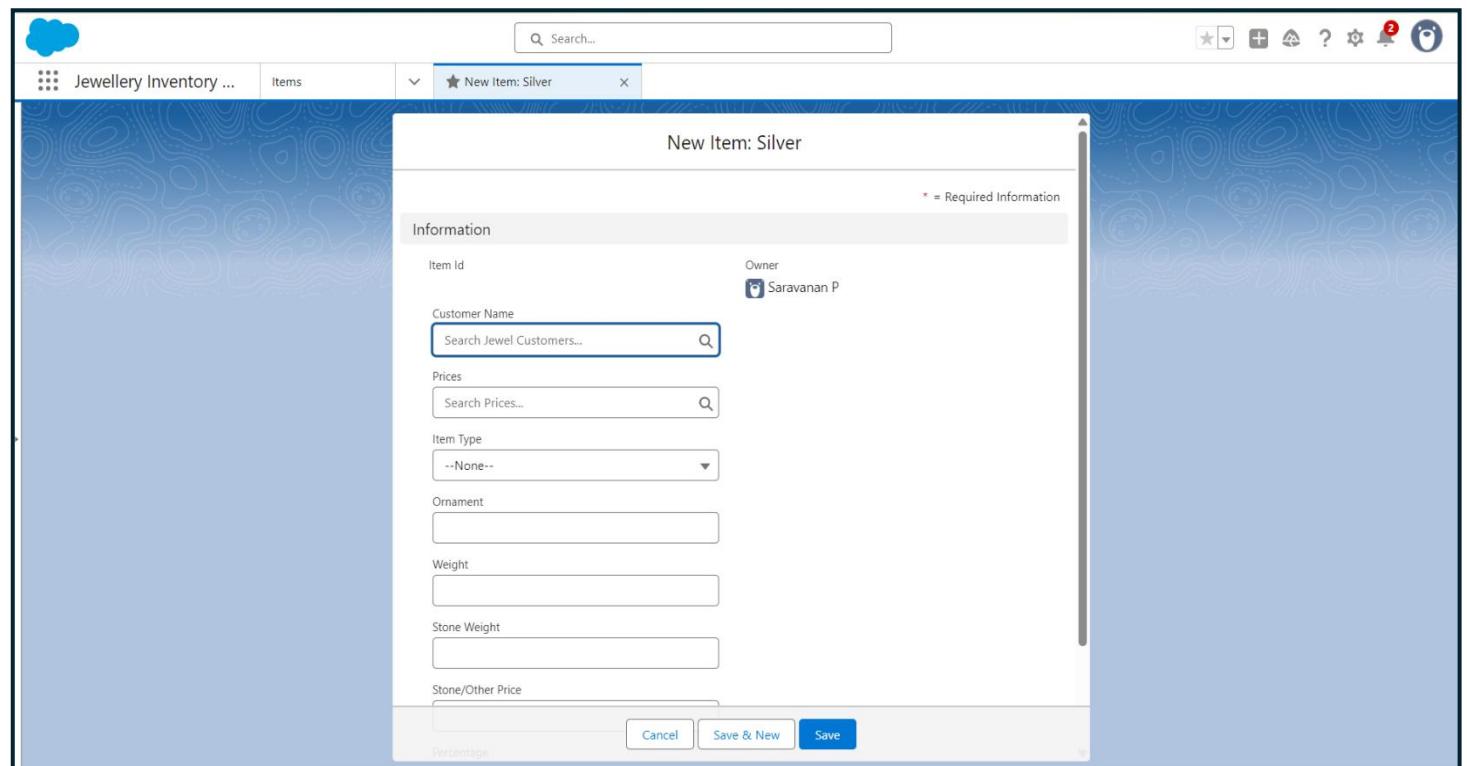
The screenshot shows a list of items under the "Items" tab. At the top left, there is a "Recently Viewed" section with a dropdown arrow and a refresh icon. To the right of this are buttons for "New", "Import", "Change Owner", and "Assign Label". Below this is a search bar with the placeholder "Search 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

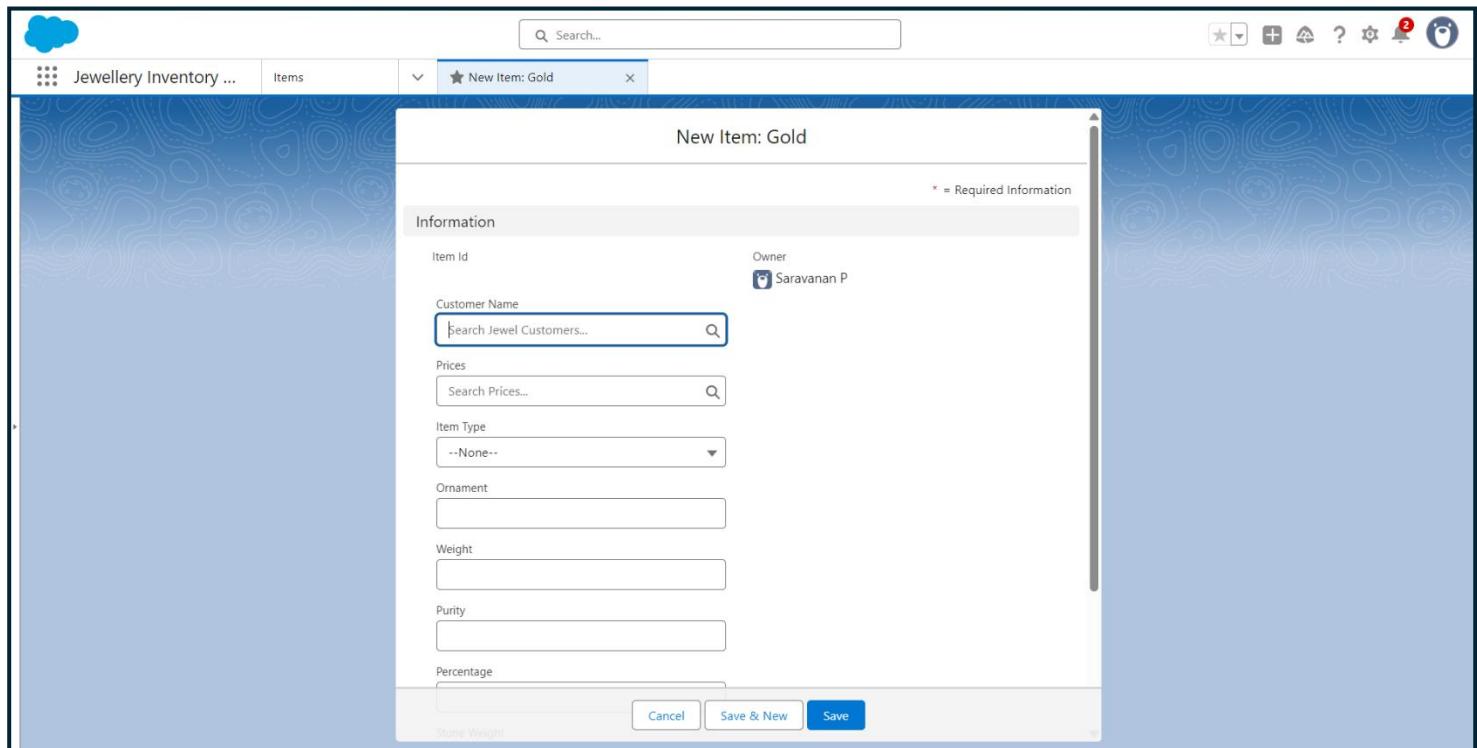
Adding New Items:



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. The top navigation bar includes a search bar, a 'Customer Orders' tab, and various icons for file operations like New, Import, and Assign Label. Below the header, a 'Recently Viewed' section lists 12 items, each with a checkbox and an order ID: Order-011, Order-012, Order-010, Order-009, Order-008, Order-007, Order-006, Order-005, Order-004, Order-003, Order-002, and Order-001. To the right of the list are several small icons for filtering and sorting. A search bar and a toolbar with additional icons are located at the bottom right of the main area.

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 labeled 'Order-011' through 'Order-001'. A sidebar on the left shows a list of items from 1 to 12. The right side features a search bar and several small icons for filtering and sorting.

The screenshot shows the details of a specific customer order named '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 is titled 'Customer Order Order-011'. It shows the following fields:

- Related: Order Id (Order-011)
- Details: Jewel Customer (Saravanan), Item (Item-10), Order Status (On Hold), Last Modified By (Saravanan P, 9/5/2025, 2:31 AM), and Created By (Saravanan P, 9/5/2025, 2:31 AM).

https://orgfarm-c68e61d4d-dev-ed.lightning.force.com/lightning/r/Customer_Order_c/a02g000004v81lQAA/view

Prices Tab:

The screenshot shows the 'Prices' tab in a 'Jewellery Inventory ...' application. The top navigation bar includes a search bar, a star icon, and various system icons. Below the navigation is a 'Recently Viewed' section showing 10 items updated a few seconds ago, with a 'Price Id' column. A large list of 10 items follows, each with a checkbox and a 'Price-0XX' label. To the right of the list are several filter and search options, including a 'Search this list...' field and icons for sorting and filtering.

Adding New Price:

The screenshot shows a 'New Price' dialog box over a 'Jewellery Inventory ...' background. The dialog has a 'New Price' title and a note that '*= Required Information'. It contains an 'Information' section with fields for 'Price Id' (with placeholder 'Gold Price') and 'Owner' (set to 'Saravanan P'). At the bottom are 'Cancel', 'Save & New', and 'Save' buttons.

The screenshot shows a Salesforce Lightning interface for a 'Price' record. The top navigation bar includes a blue cloud icon, a search bar, and various global navigation icons. 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 right side of the screen features a large, light-blue background area with a faint topographic map pattern.

Billing Tab:

The screenshot shows a Salesforce Lightning interface for the 'Billing__c' object. The top navigation bar is identical to the previous screenshot. The main header displays 'Jewellery Inventory ...' and 'Billings'. The current tab is 'Billings'. The list view shows 10 items, all updated a few seconds ago. The columns include 'Billing Id' (e.g., BILL-007, BILL-008, BILL-010, etc.) and other standard list view columns. The right side of the screen includes a toolbar with 'New', 'Import', 'Change Owner', and 'Assign Label' buttons, along with a search bar and filter options.

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 top navigation bar includes icons for Billing, Bill-007, and other options like New Contact, Edit, and New Opportunity.

The main area displays the following details:

Related	Details
Billing Id	Bill-007
Item	Saravanan P
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:

Screenshot of the Reports tab in Salesforce Lightning. The URL is orgfarm-c68e6f1d4d-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=mru. The page displays a list of recent reports under the 'Recent' section. The sidebar on the left includes sections for Reports, Folders, and Favorites.

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	

Creating a Report:

Screenshot of the Report Builder interface. The title bar shows 'Jewellery Inventory ...' and 'Report Builder'. The main area is titled 'Create Report' and contains a sidebar with 'Category' and 'Recently Used' sections, and a main panel for 'Select a Report Type'.

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

Jewellery Inventory ... Reports New Prices Report

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

	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:

orgfarm-c68e6f1d4d-dev-ed.lightning.force.com/lightning/o/

Jewellery Inventory ... Dashboards

Recent

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	

Private Dashboards

All Dashboards

FOLDERS

All Folders

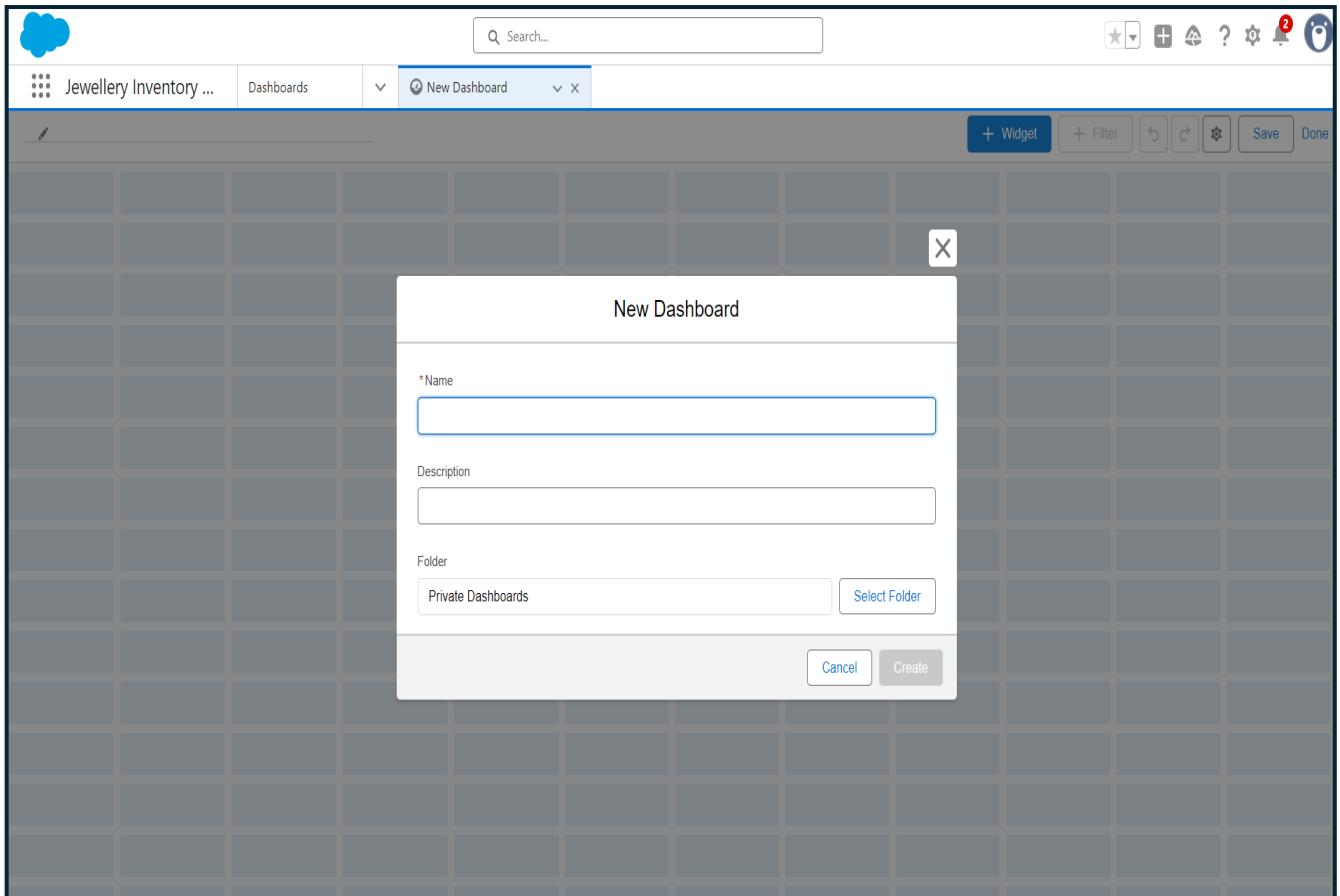
Created by Me

Shared with Me

FAVORITES

All Favorites

Adding A New Dashboard:



The screenshot shows the Salesforce Lightning interface displaying a dashboard named "Dashboard 1". The URL in the browser bar is "orgfarm-c60e6f1d4d-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01ZgL000003Sf6XUAS/view?queryScope=userFolders". The dashboard header includes a blue cloud icon, a search bar, and navigation icons. The dashboard itself has a title "Dashboard 1" and a subtitle "As of Sep 17, 2025, 6:42 AM Viewing as Saravanan P". It features a report titled "New Prices Report" with a table of data. The table has columns: Price: Price Id ↑, Gold Price, and Silver Price. The data rows are:

Price: Price Id ↑	Gold Price	Silver Price
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
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". To the right of the report, there are buttons for "Refresh", "Edit", and "Subscribe".

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;  
        }  
    }  
}
```