CRM Application for Jewel Management - (Developer)

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Collage Code: ASBRUAG

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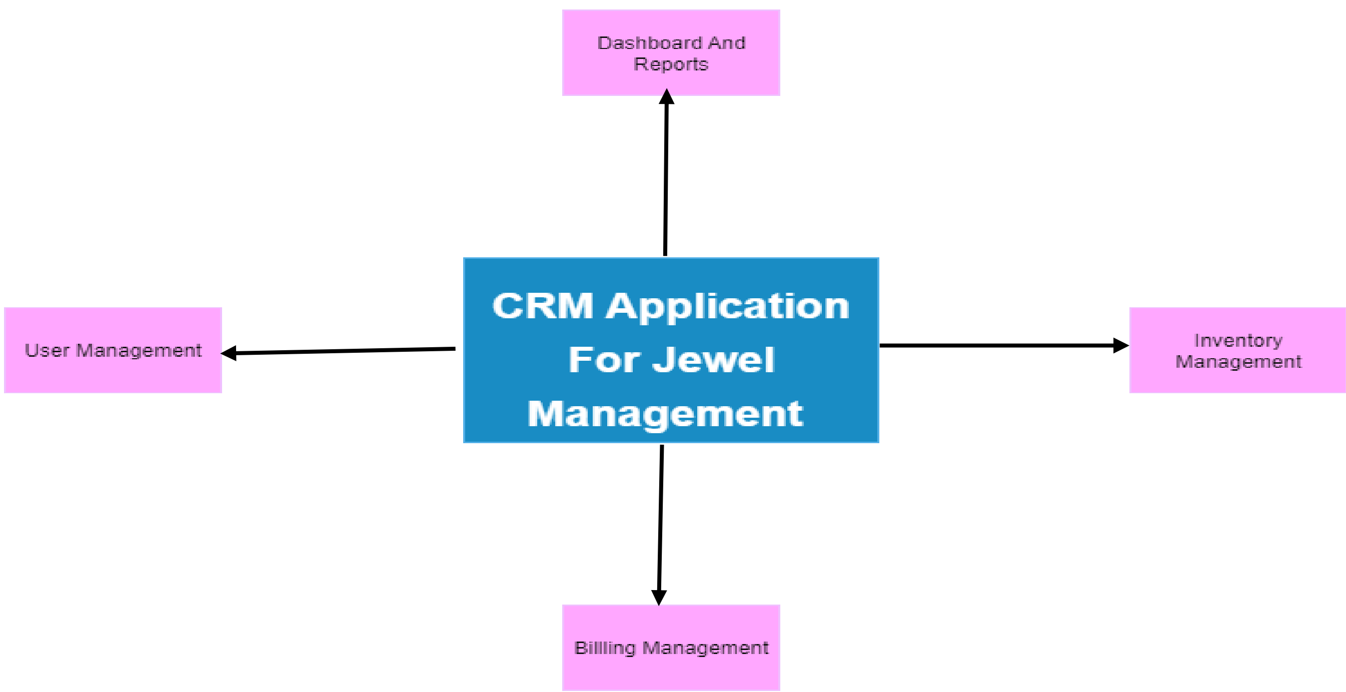
1.INTRODUCTION

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

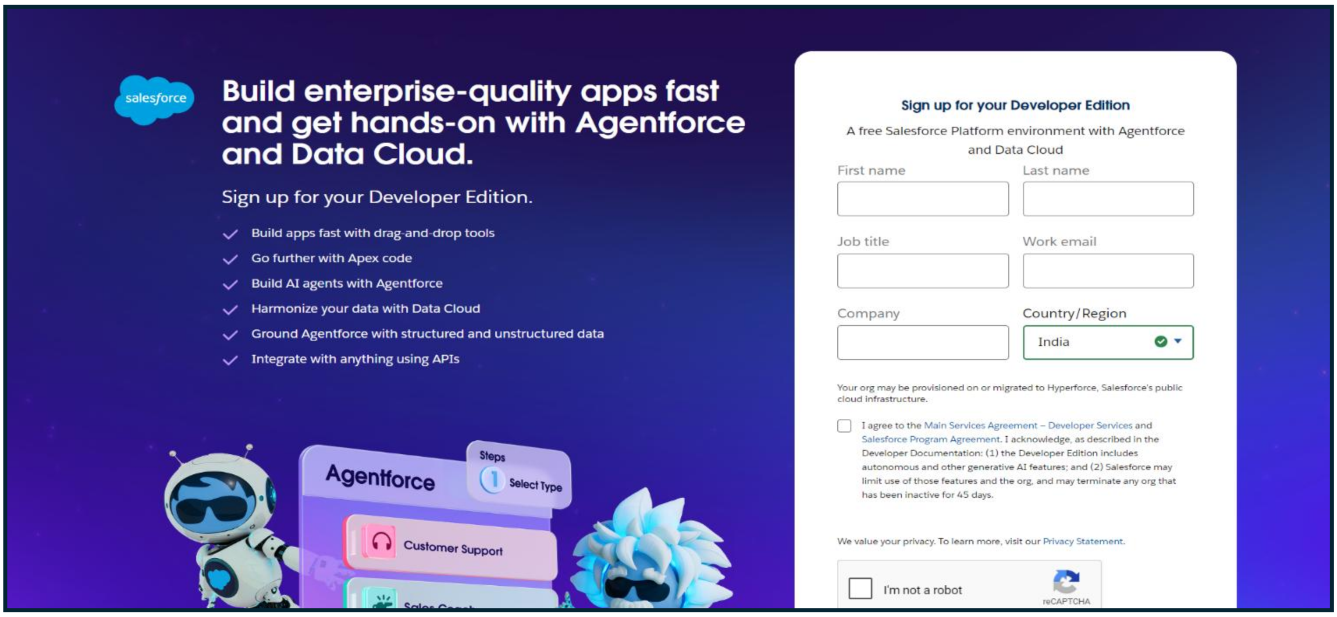
The purpose of the Jewel Inventory and CRM System is to provide a comprehensive and efficient software solution for a jewelry business. It's designed to solve the common challenges faced by jewelers, such as manual inventory tracking, disorganized customer data, and disconnected sales processes.

2.Development Phase:

Creating Developer Account:

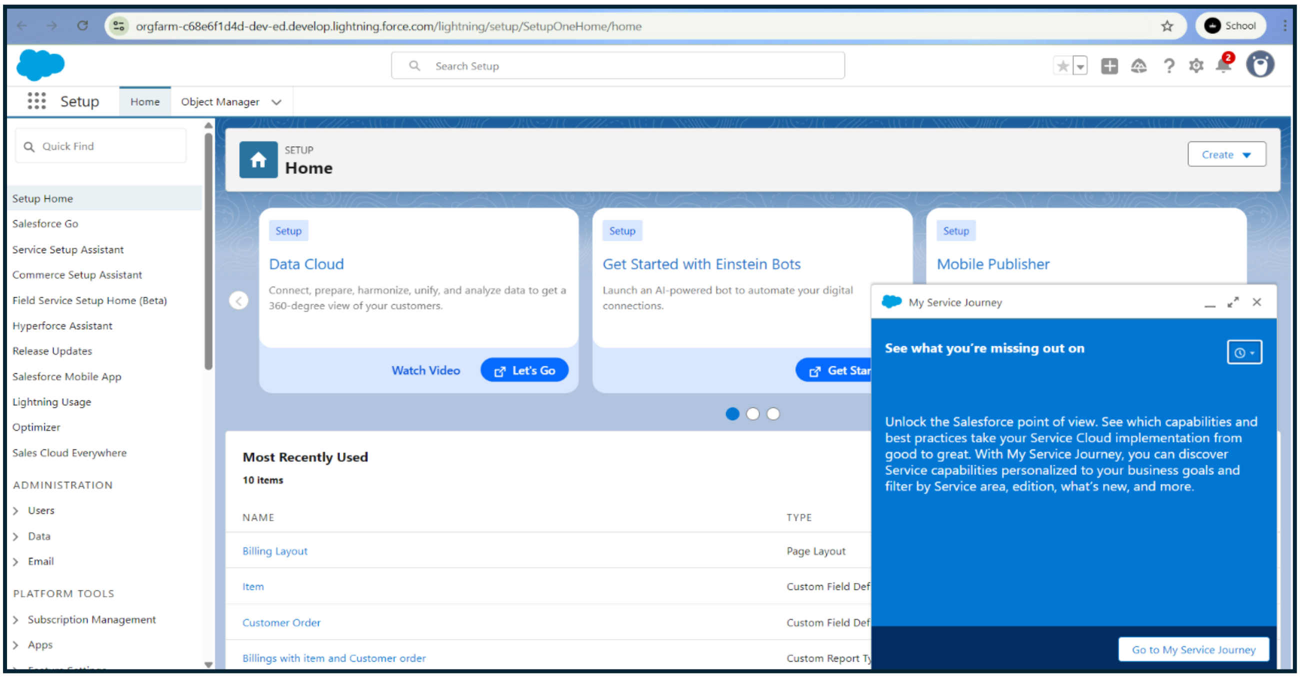
Creating a developer org in salesforce.

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



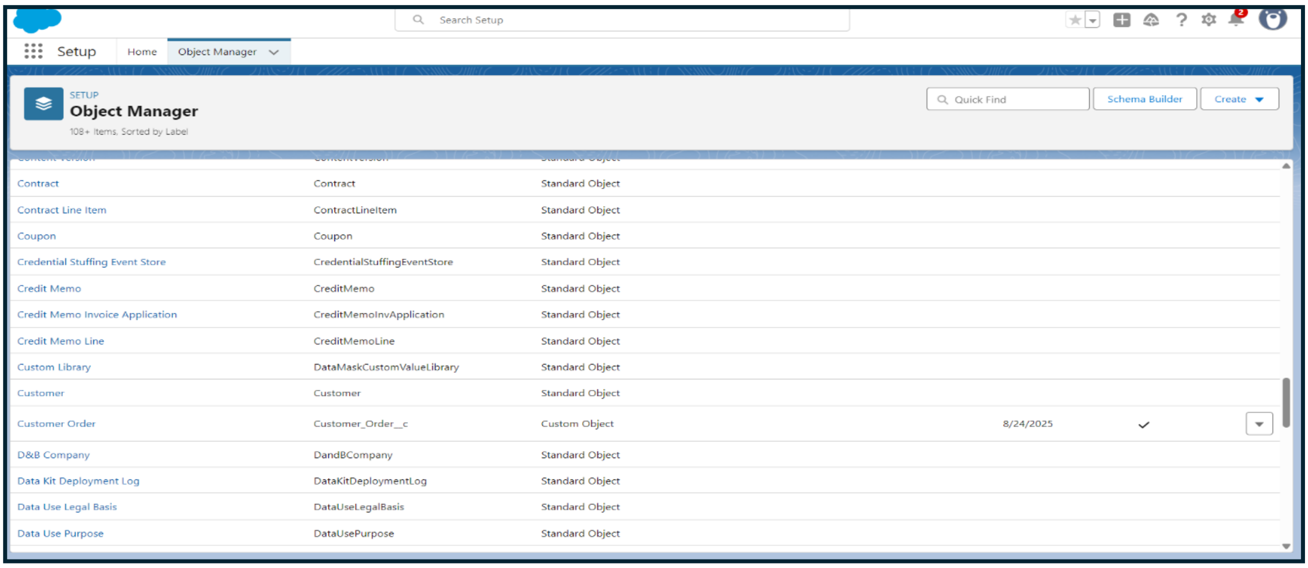
Account Activation:

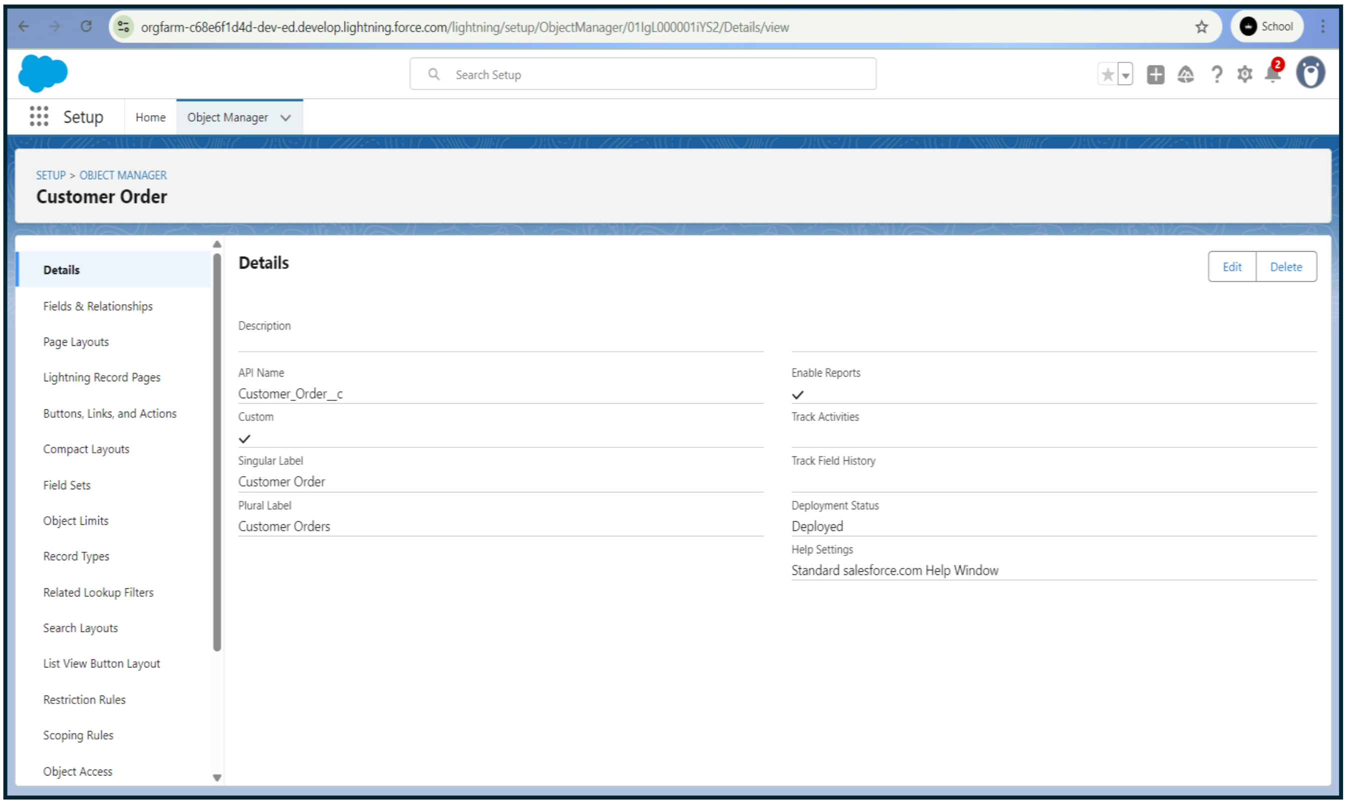
Go to the inbox of the email that you used while signing up. Click on the Reset Password to activate your account. The email may take 5-10mins.



Create Jewel Customer Object:

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

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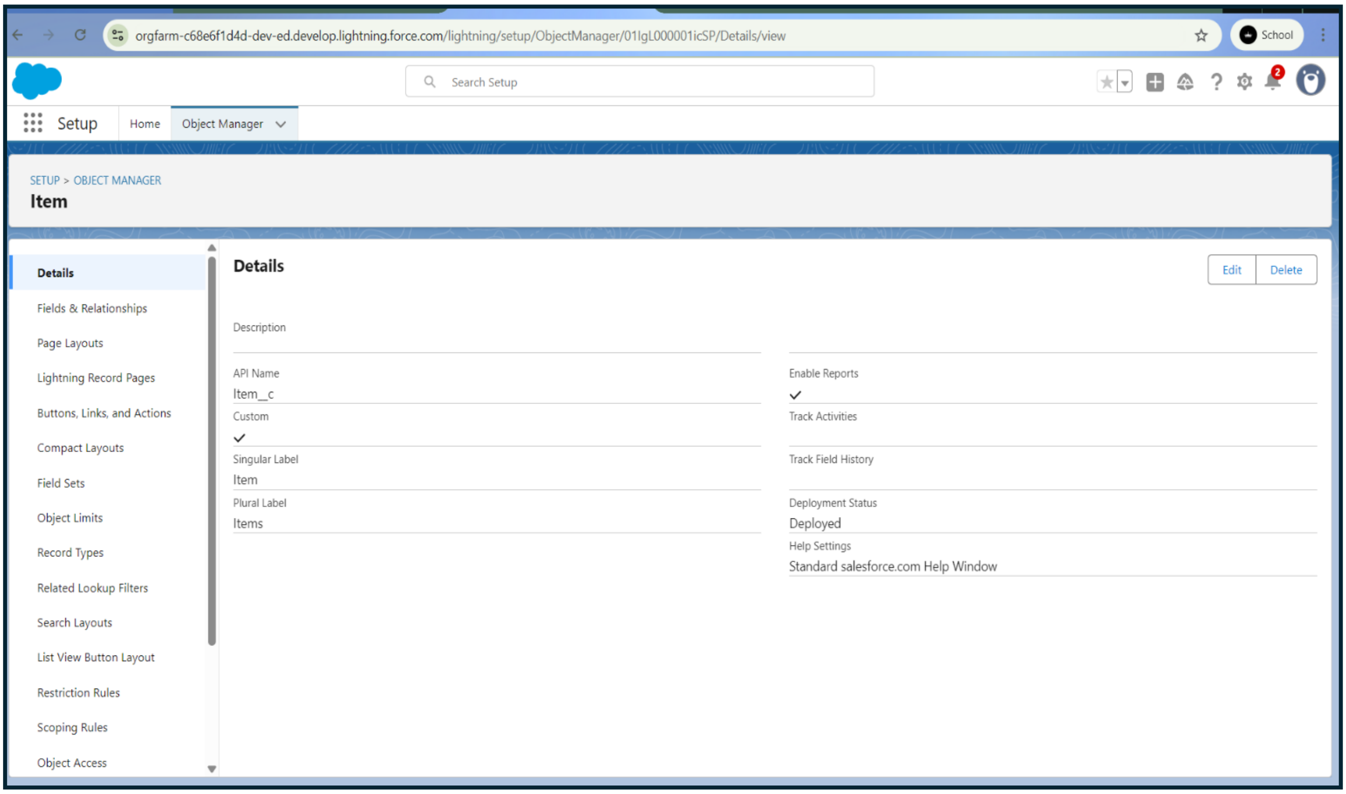
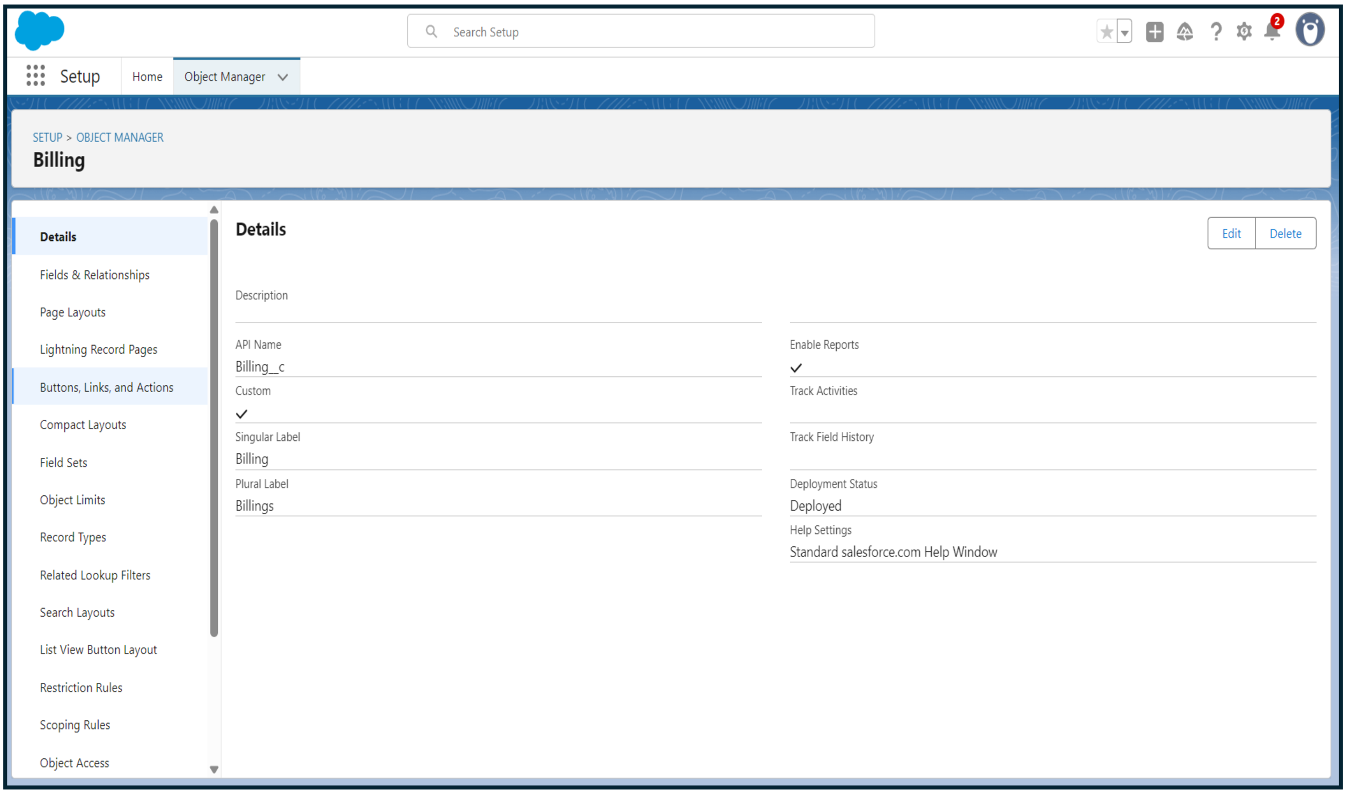
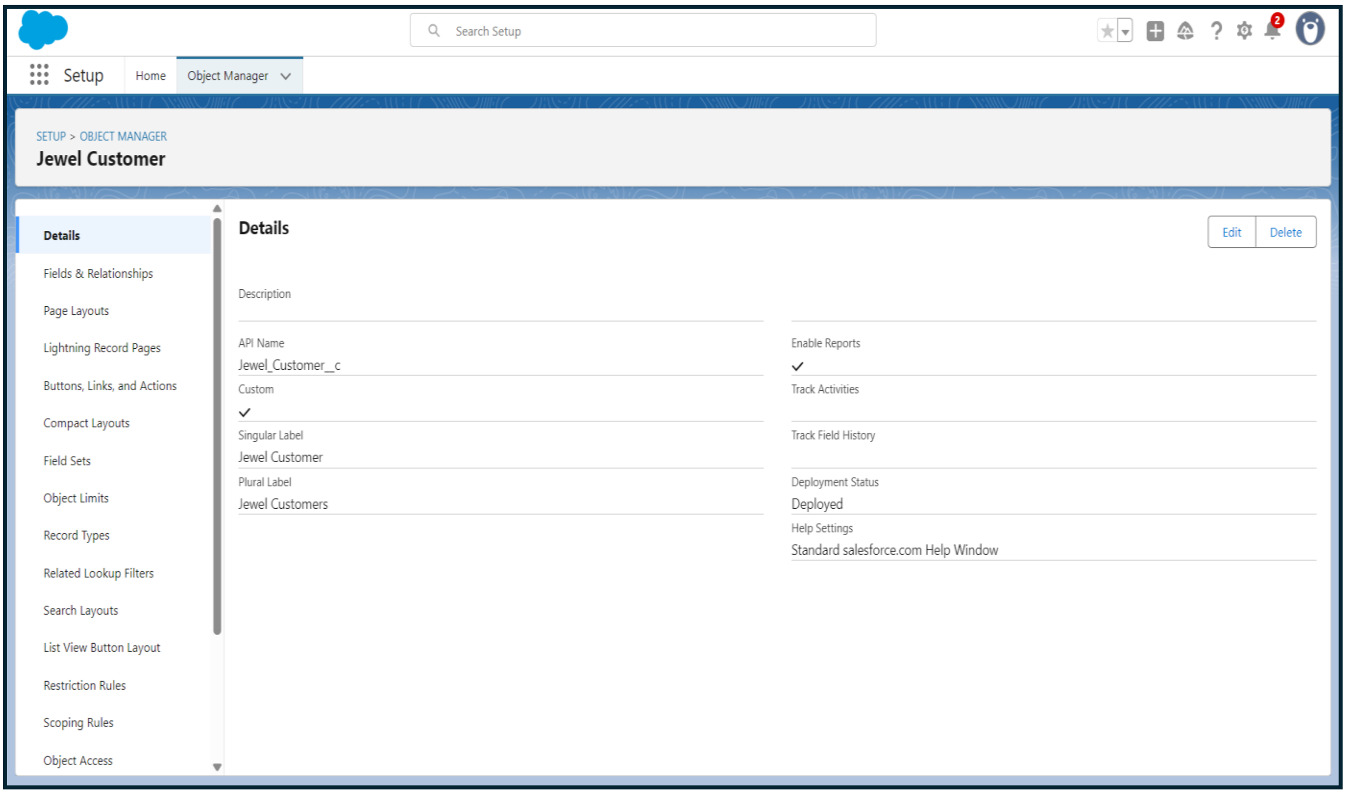
School
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Customer Order
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Details
Edit
Delete
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

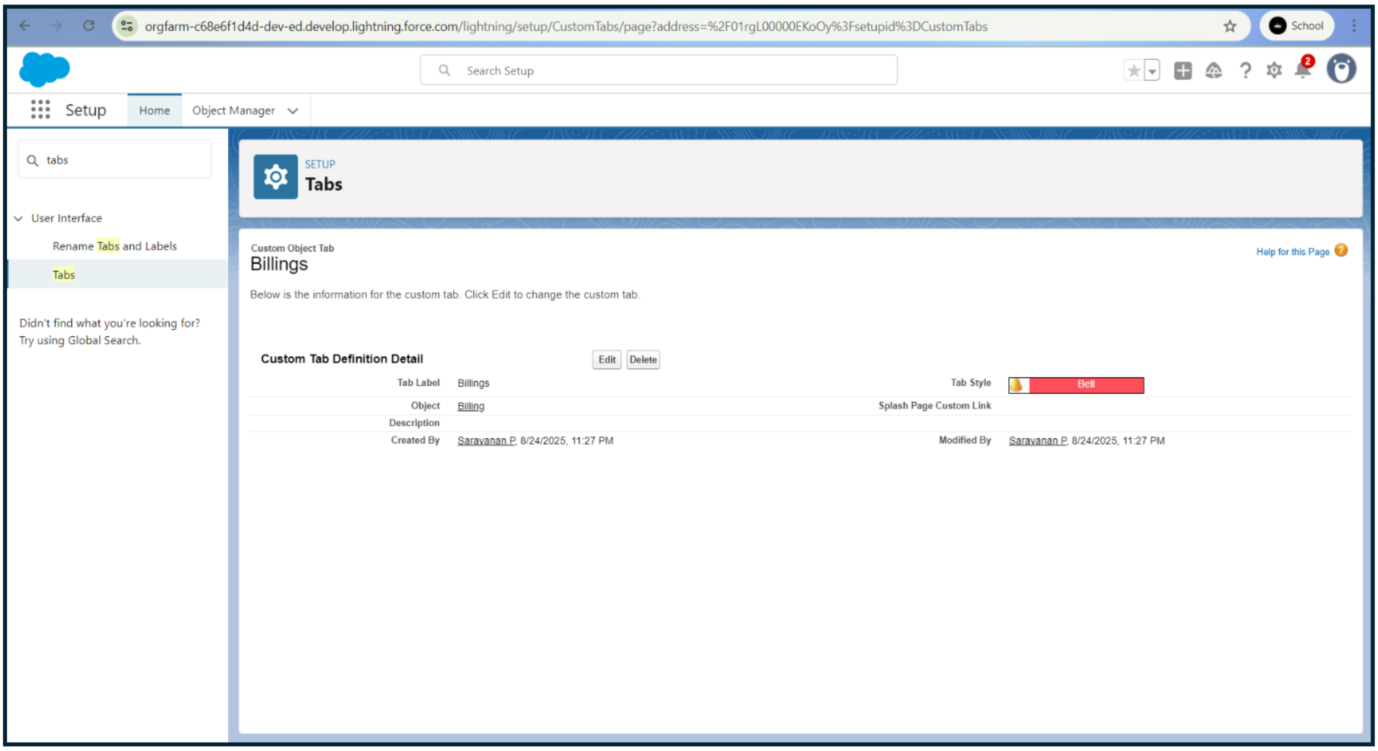

orgfarm-c68e6f1d4d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000001icSP/Details/view
School
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Item
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Details
Edit
Delete
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

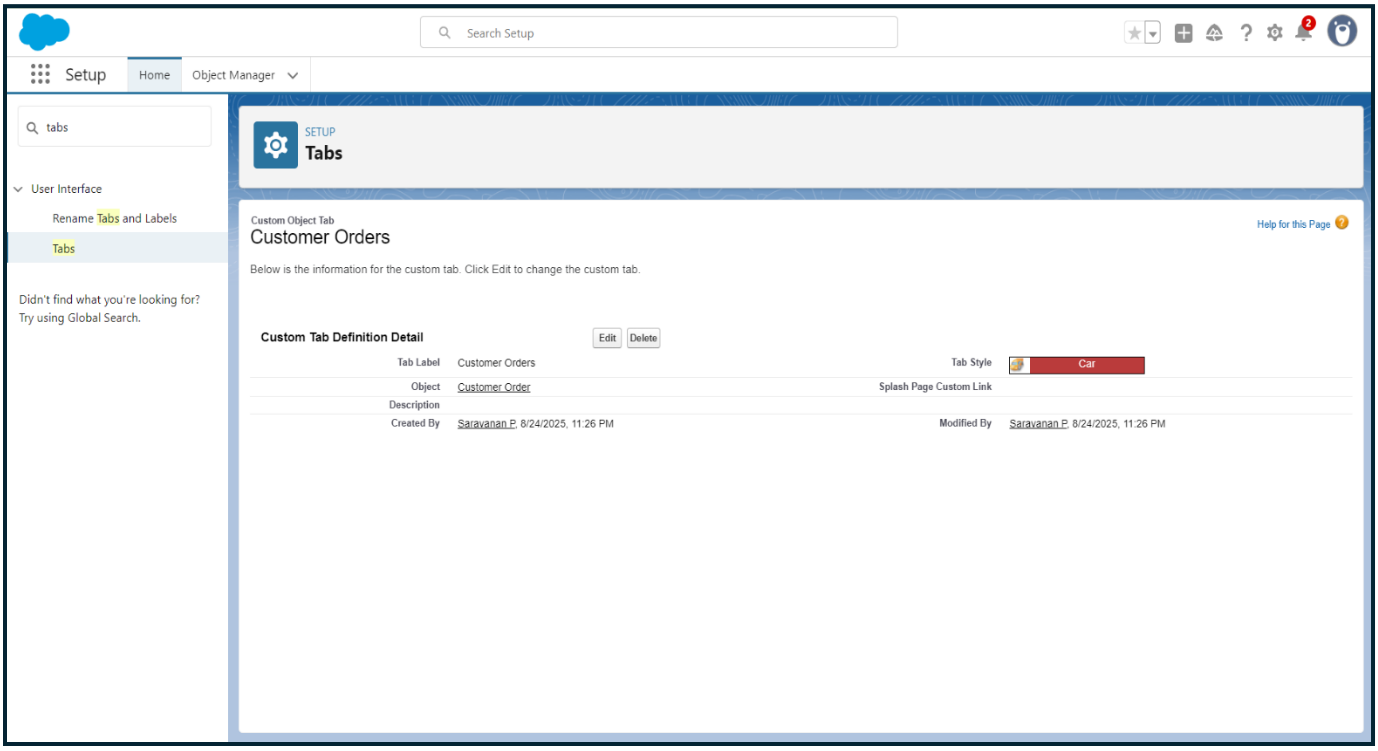

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Details
Edit
Delete
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

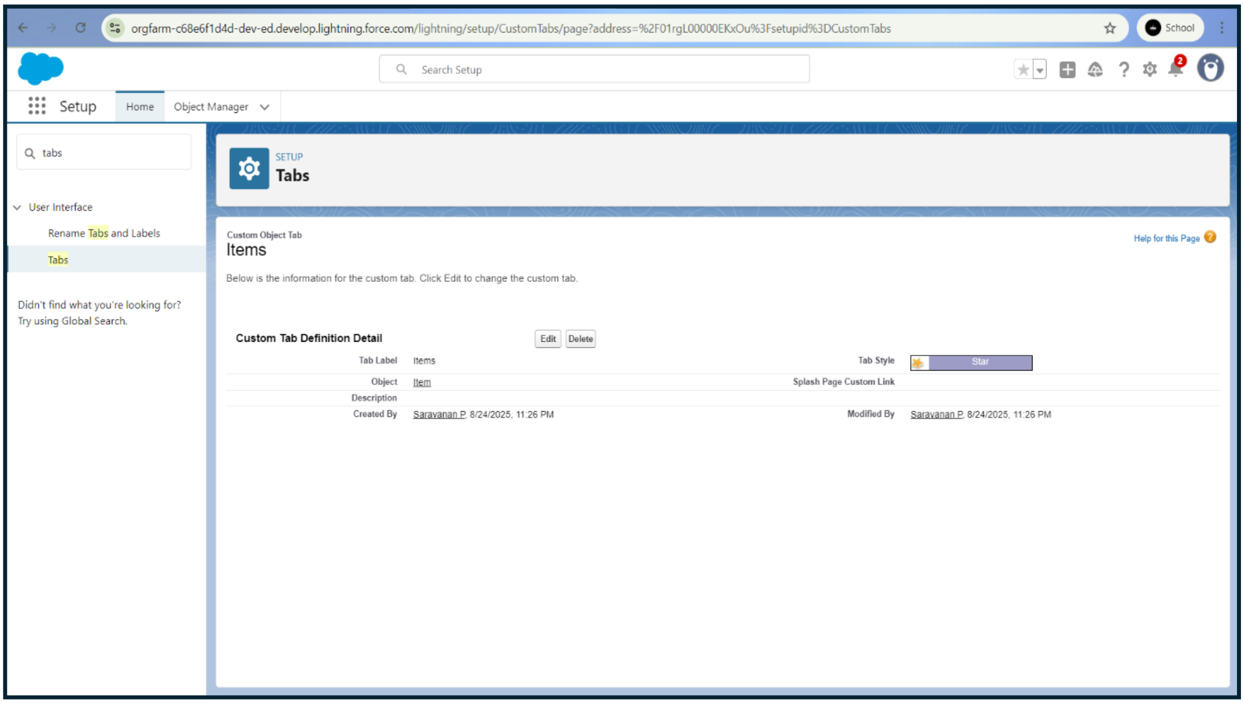

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Jewel Customer
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Details
Edit
Delete
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

Creating a Custom Tab:

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



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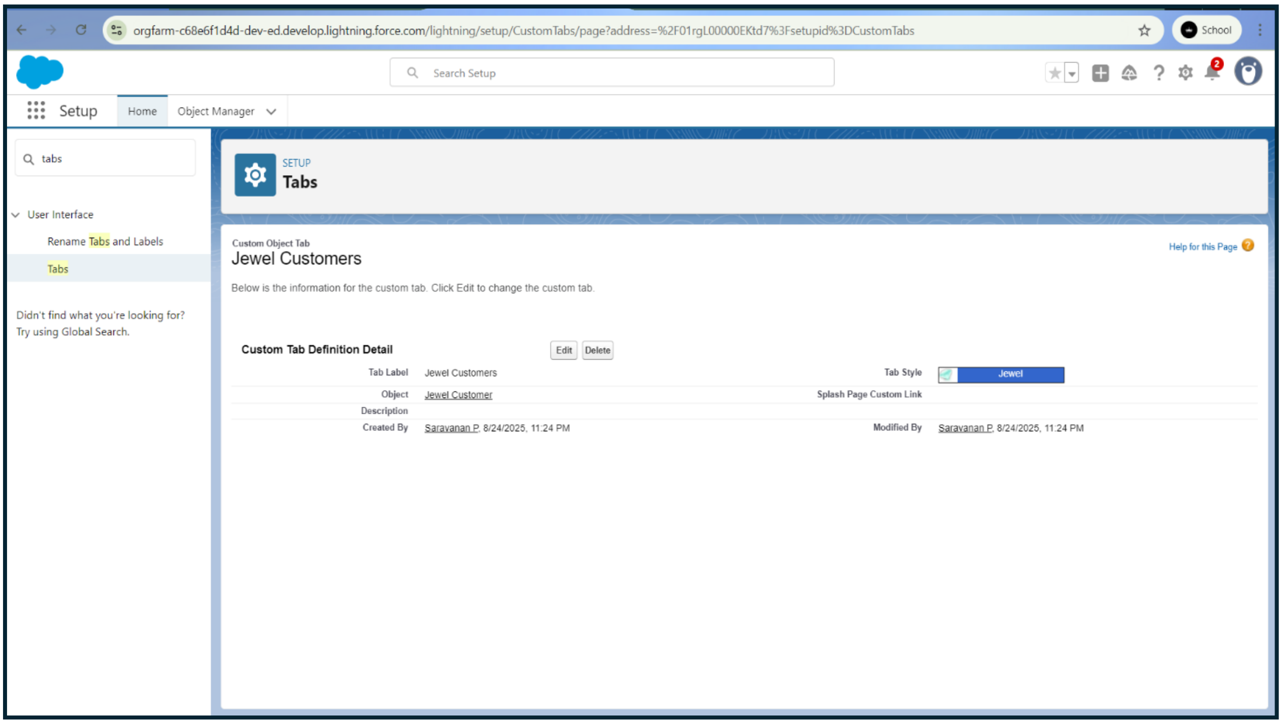
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
Custom Object Tab
Items
Help for this Page
Below is the information for the custom tab. Click Edit to change the custom tab.
Custom Tab Definition Detail
Edit
Delete
Tab Label
Items
Tab Style
Star
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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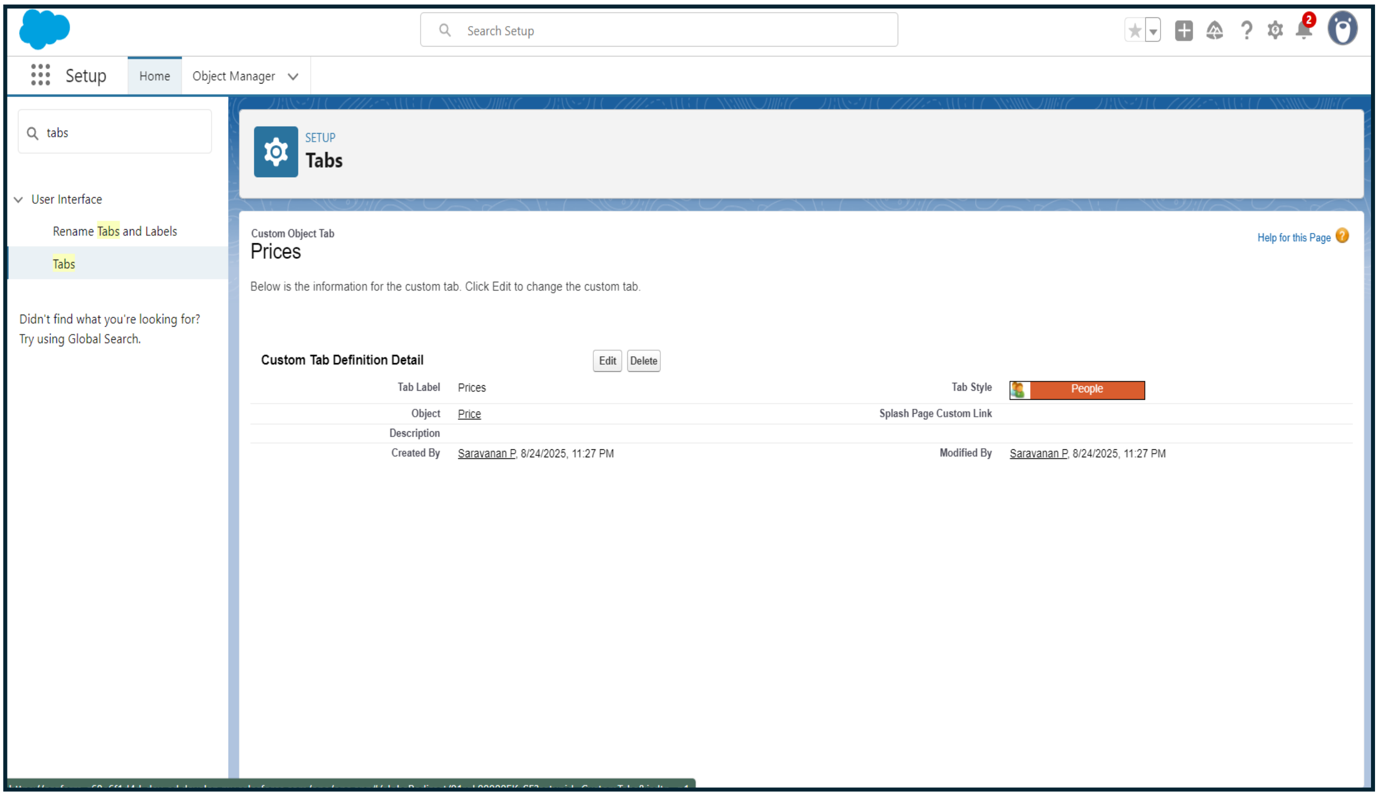
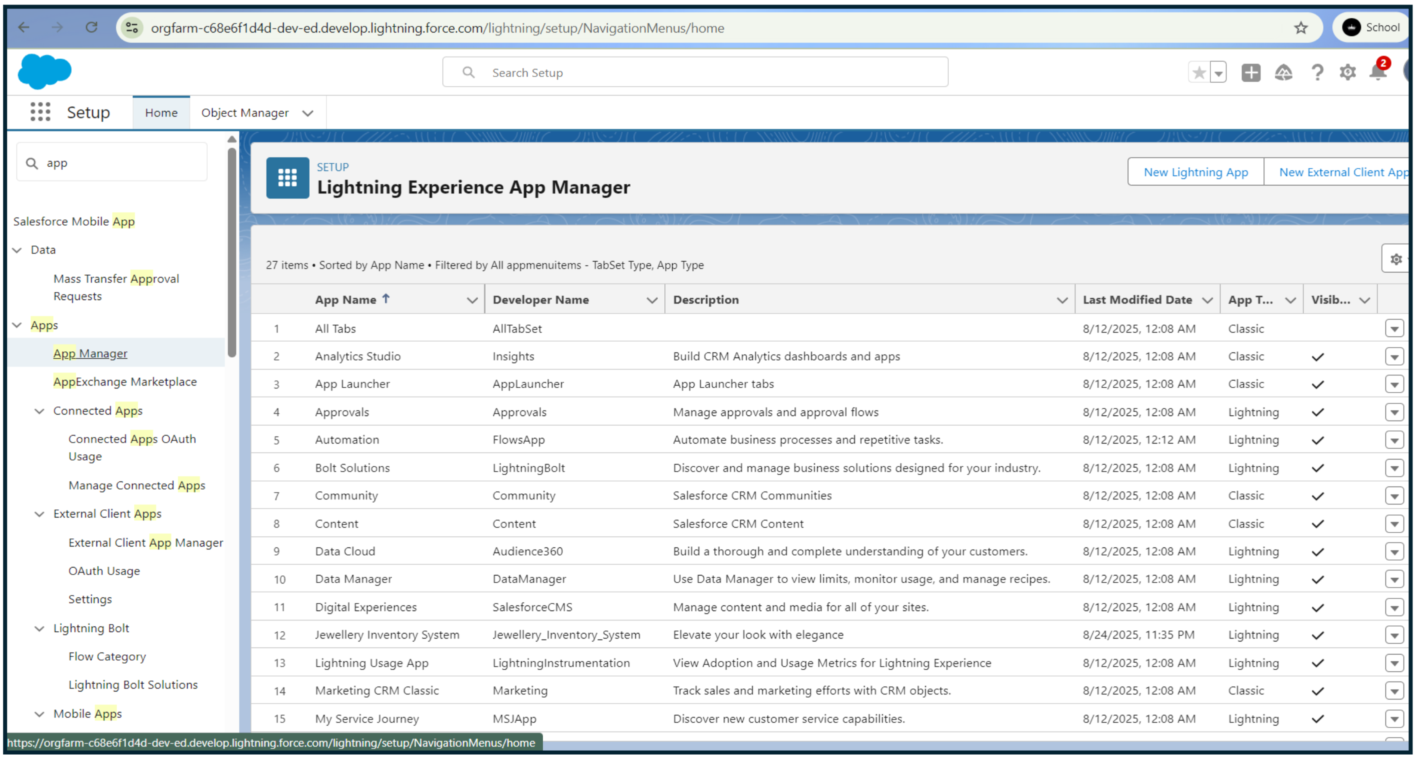
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
Custom Object Tab
Jewel Customers
Help for this Page
Below is the information for the custom tab. Click Edit to change the custom tab.
Custom Tab Definition Detail
Edit
Delete
Tab Label
Jewel Customers
Tab Style
Jewel
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



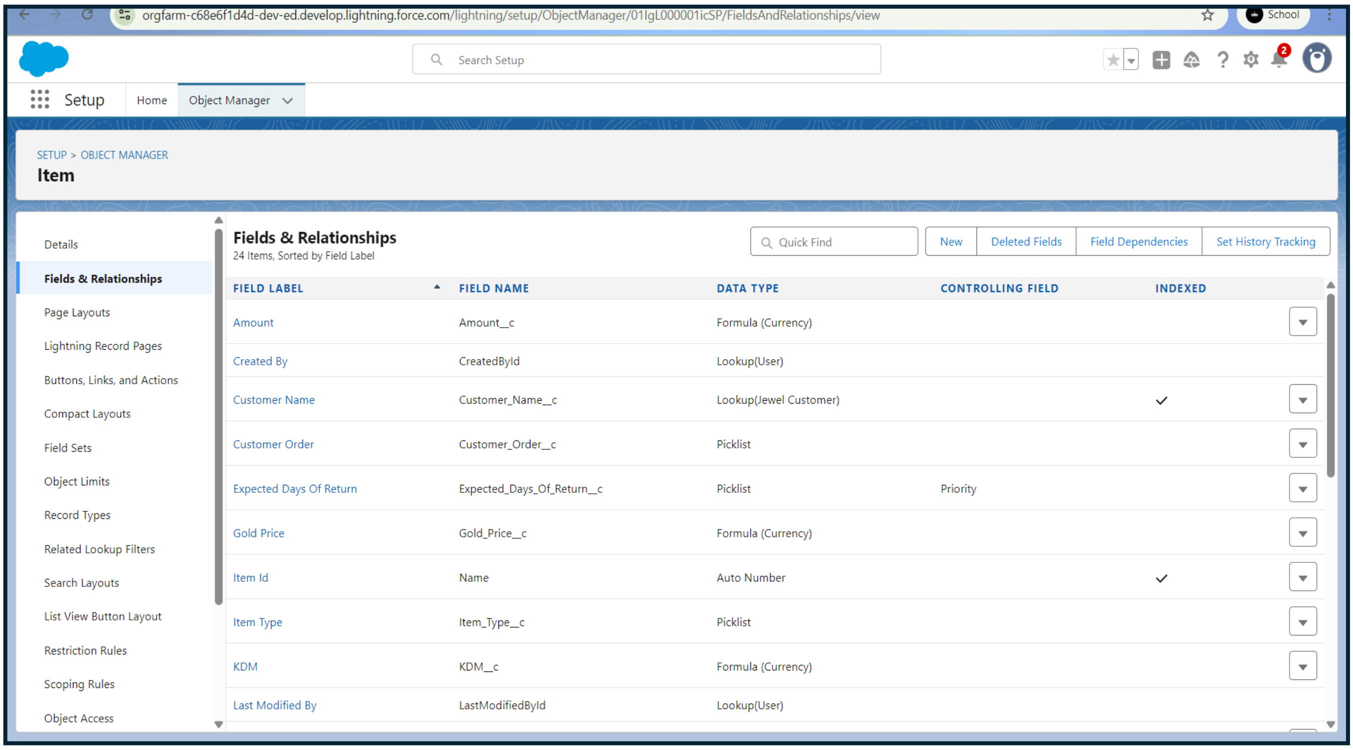
Create a Lightning App:

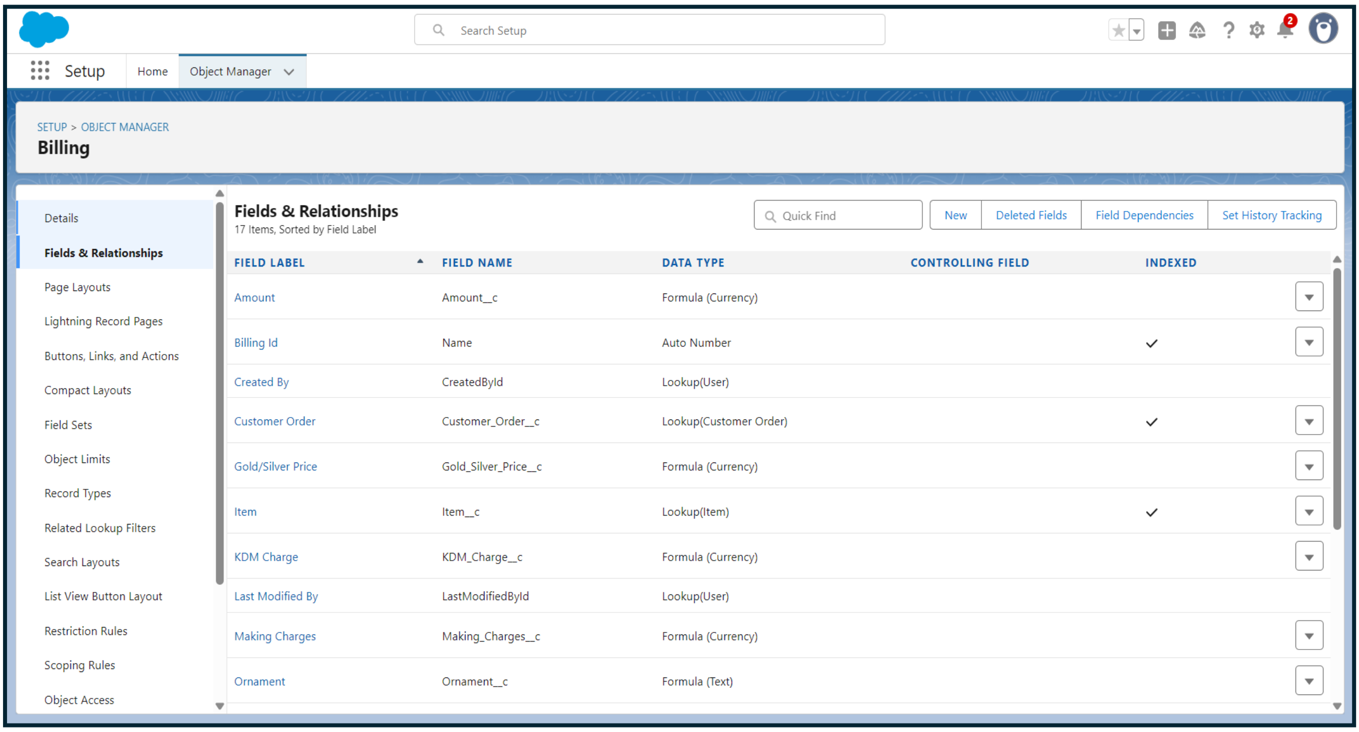
Create a Lightning App With Name Jewellery Inventory System

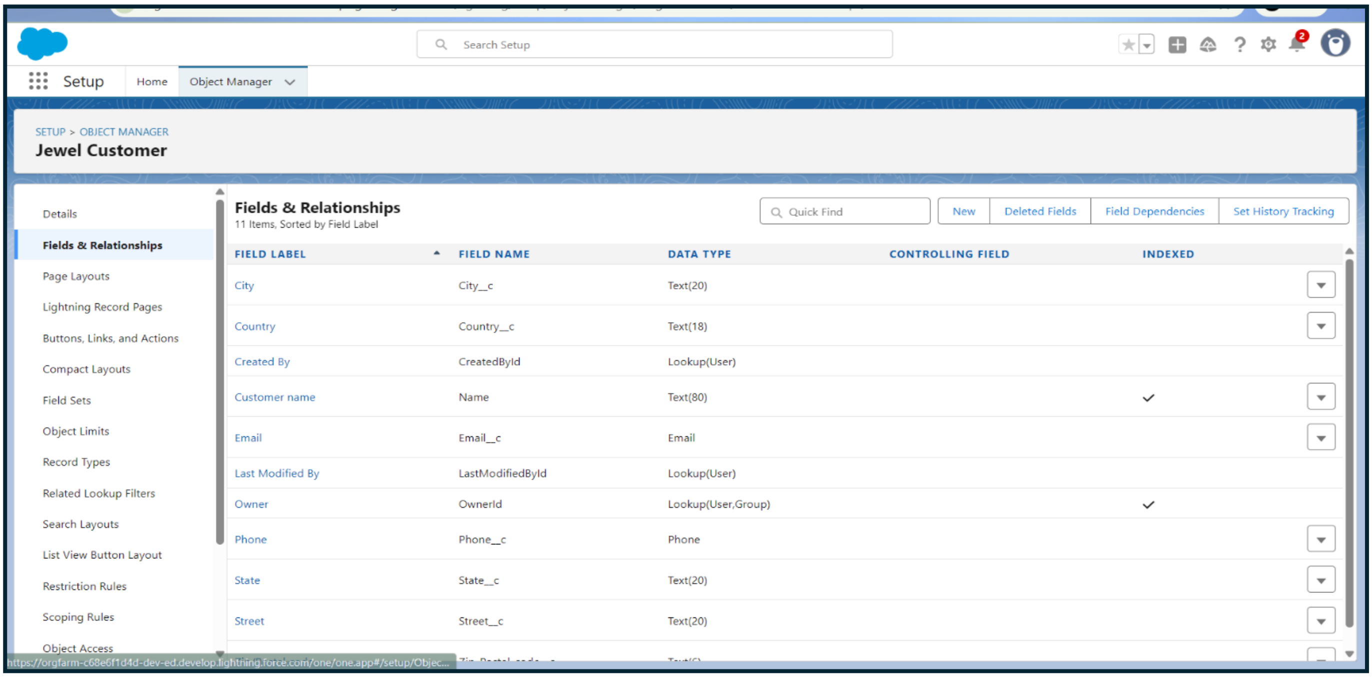


Creating Fields For Objects:

Create the fields for the Objects created.

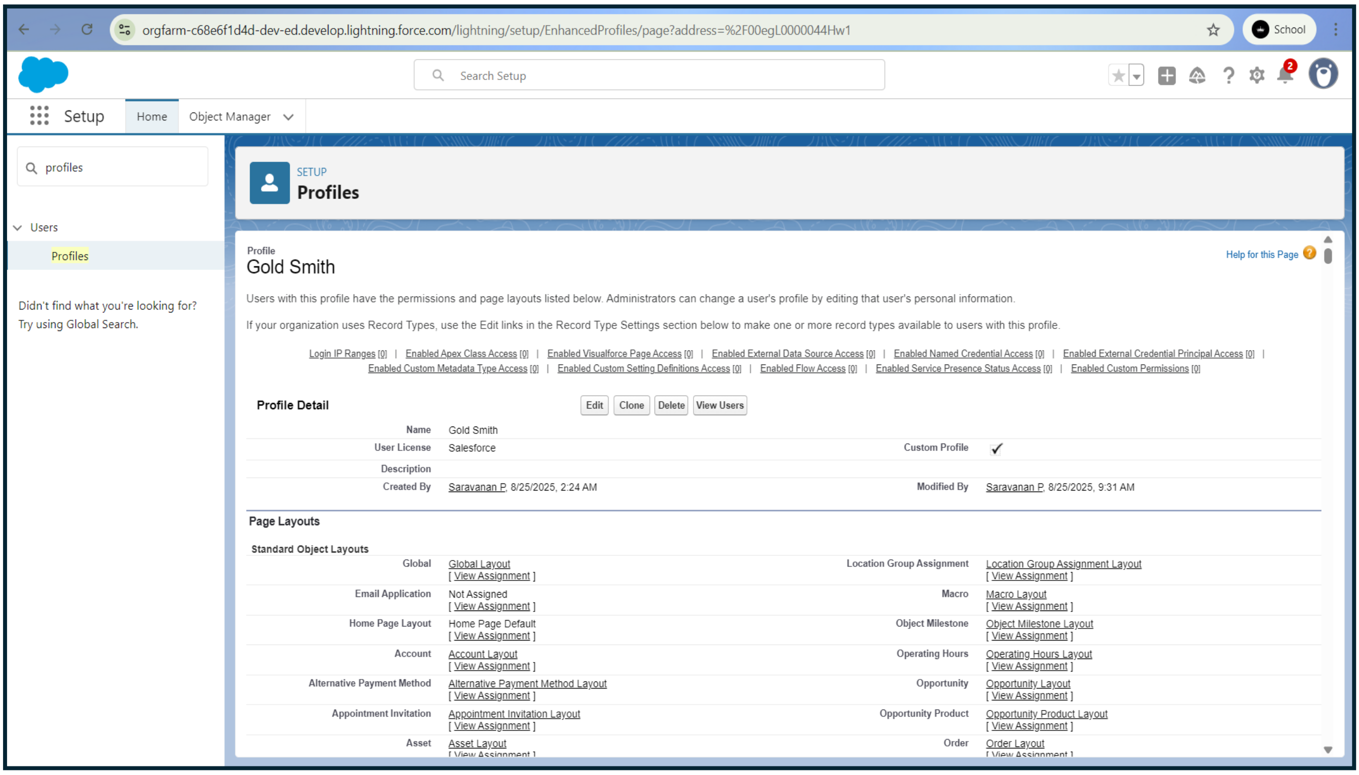


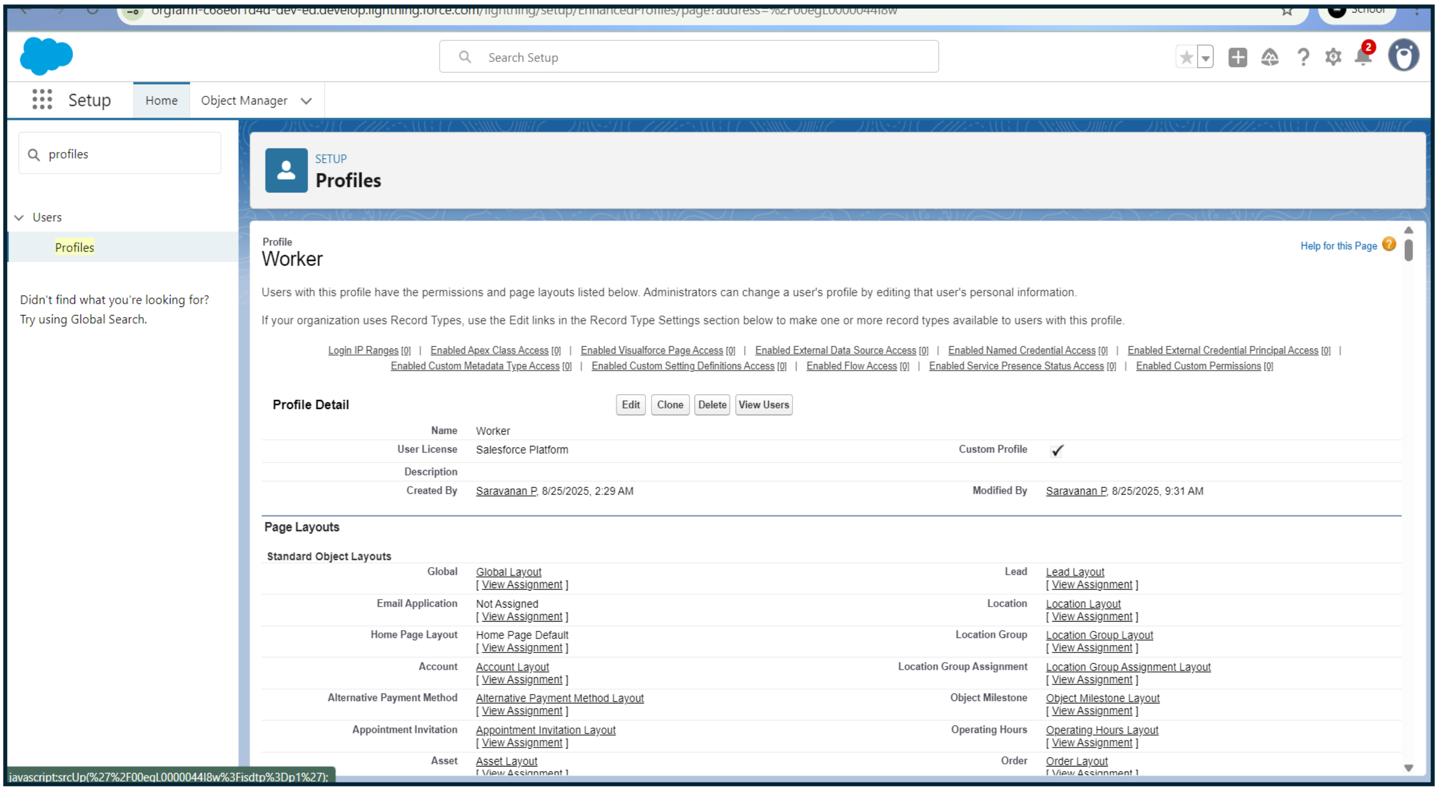




Creating Profiles:

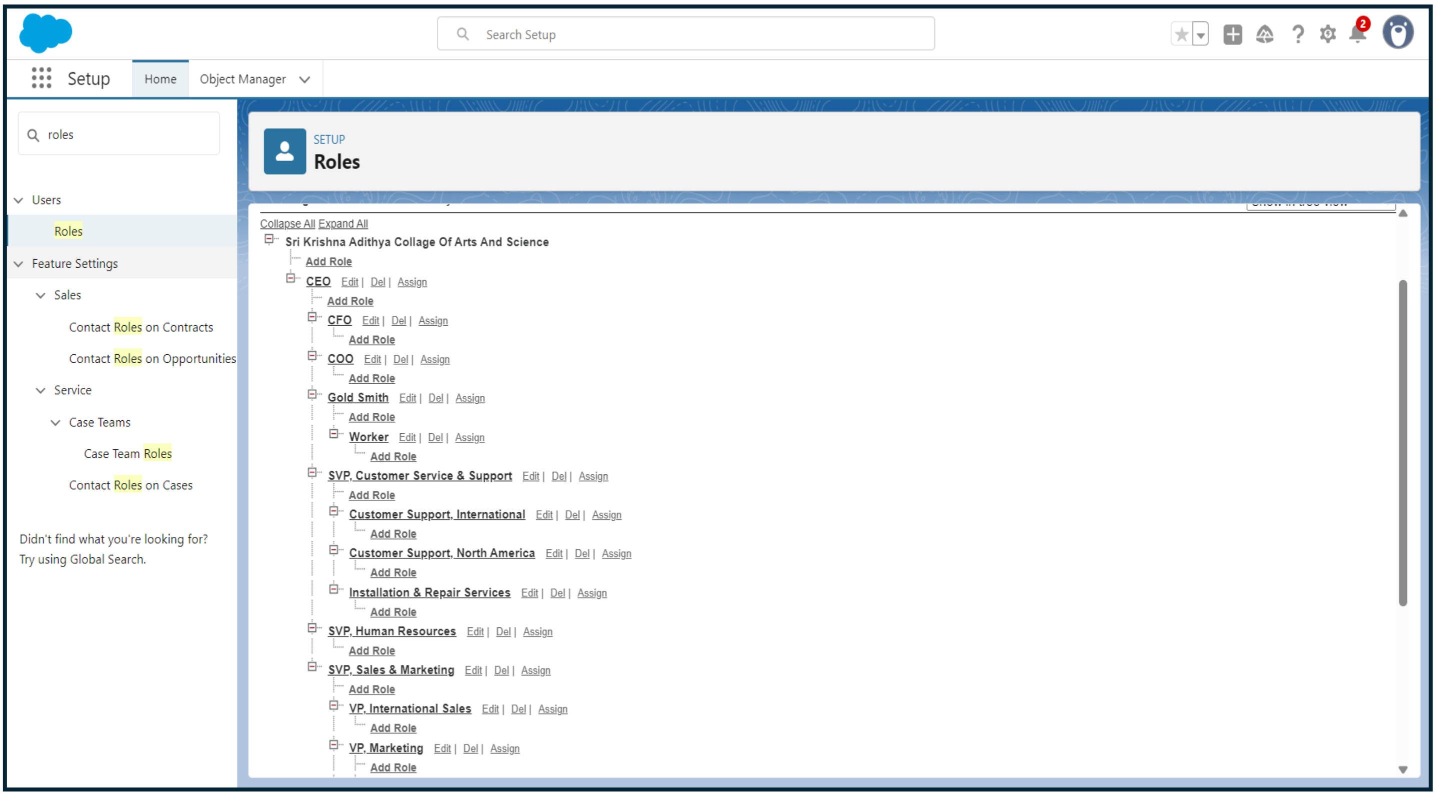
Create two profiles Gold Smith and Work Profiles





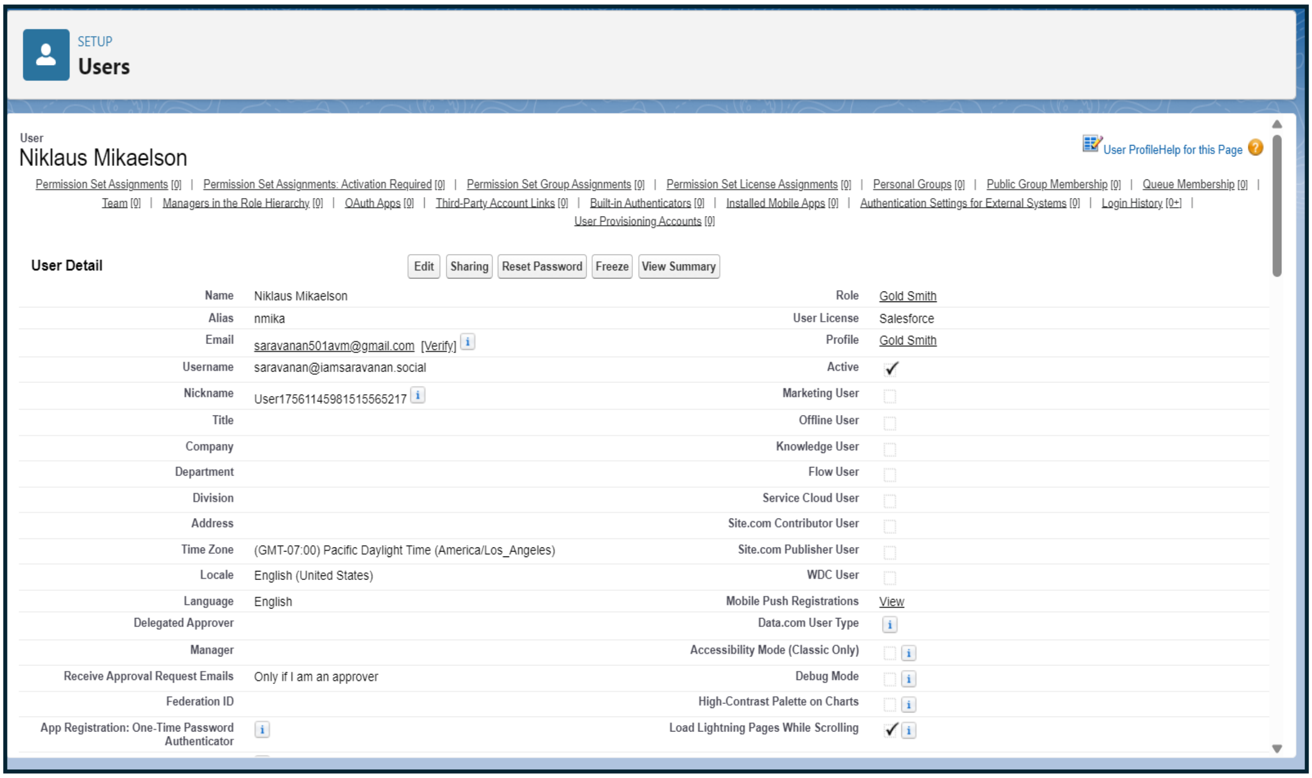
Creating Roles:

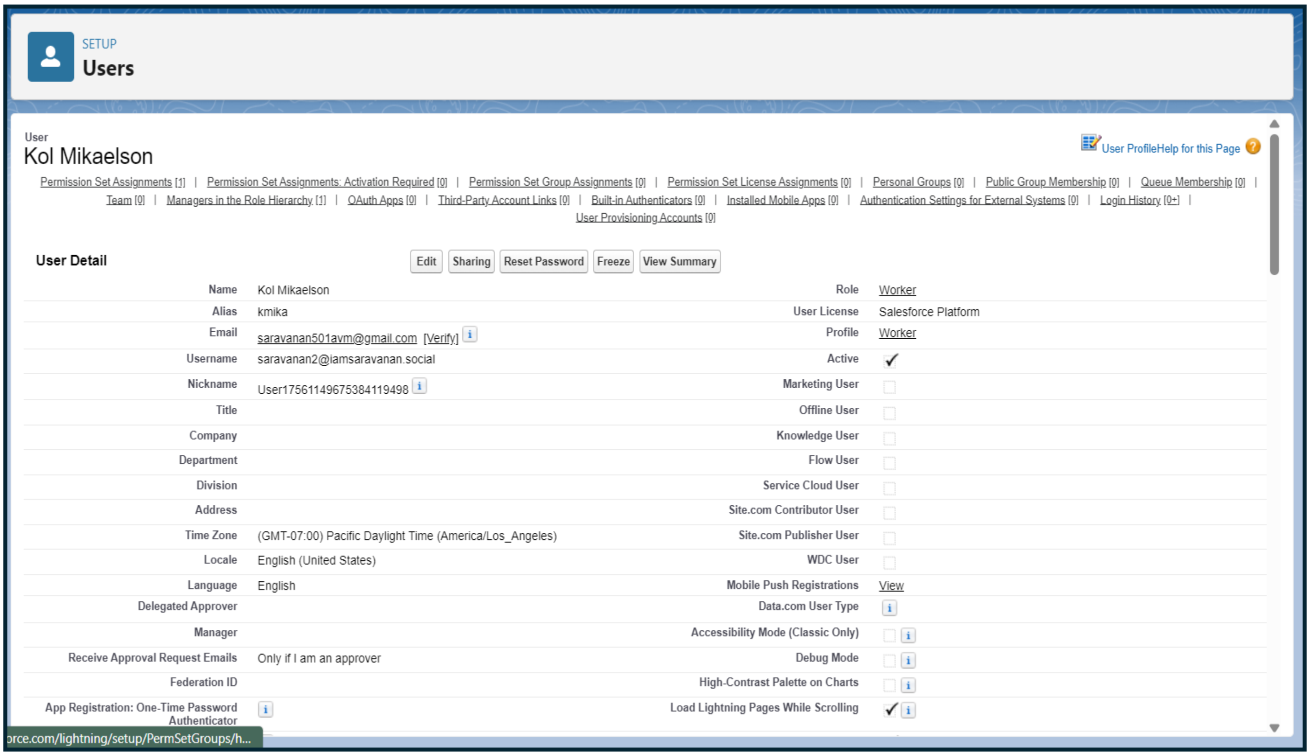
Create roles for Gold Smith And Worker

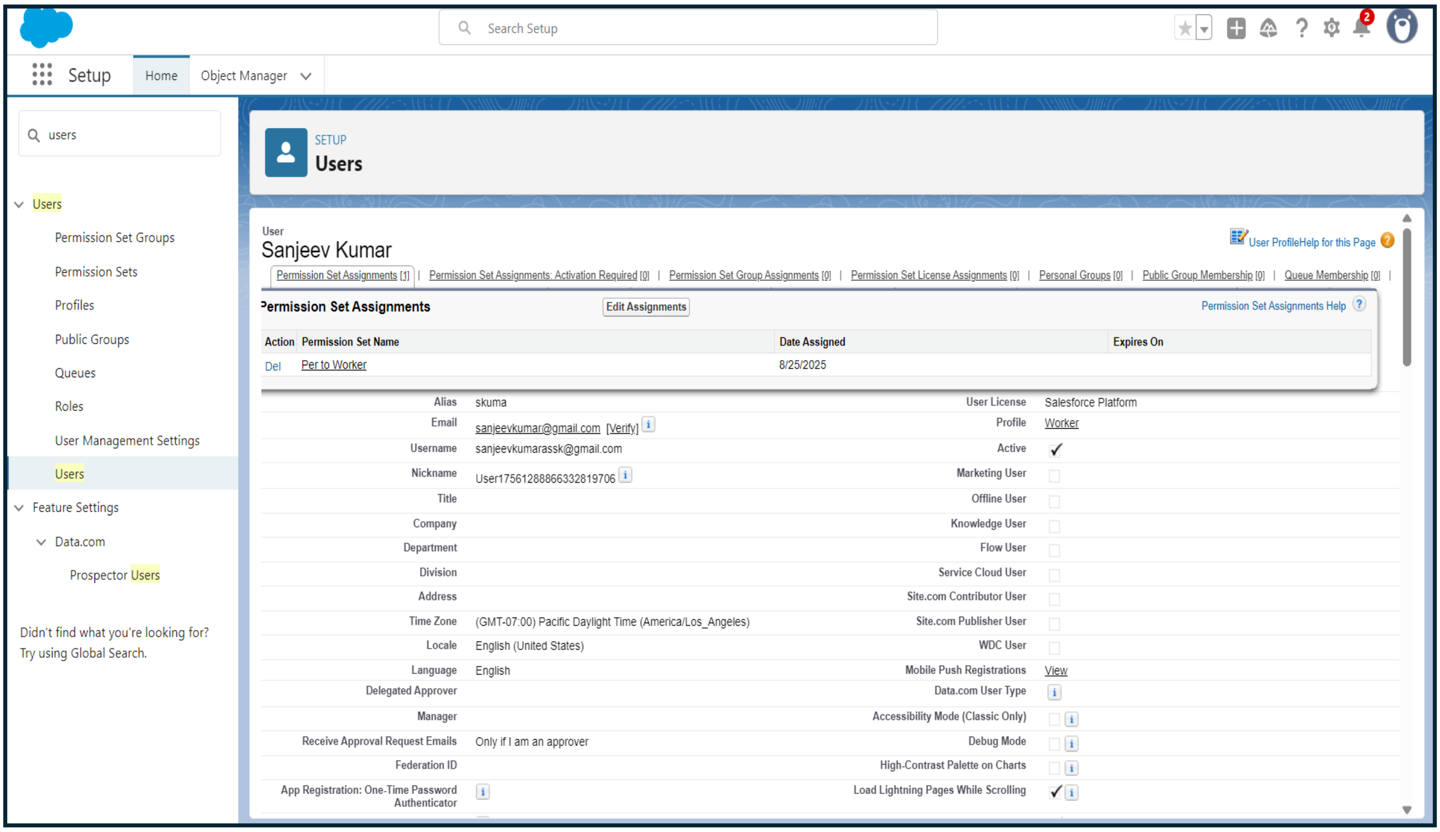


Creating Users:

Create users with Gold Smith and Worker Profiles

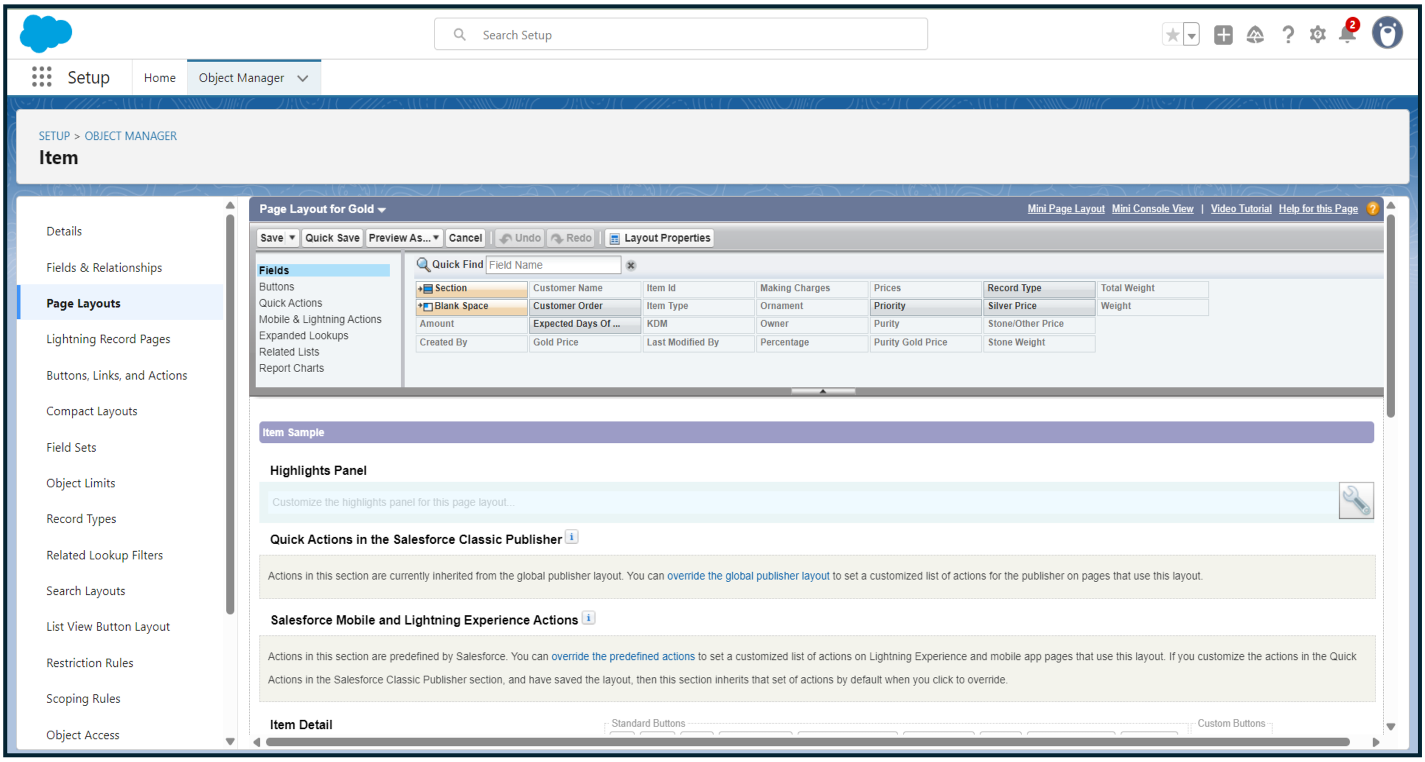


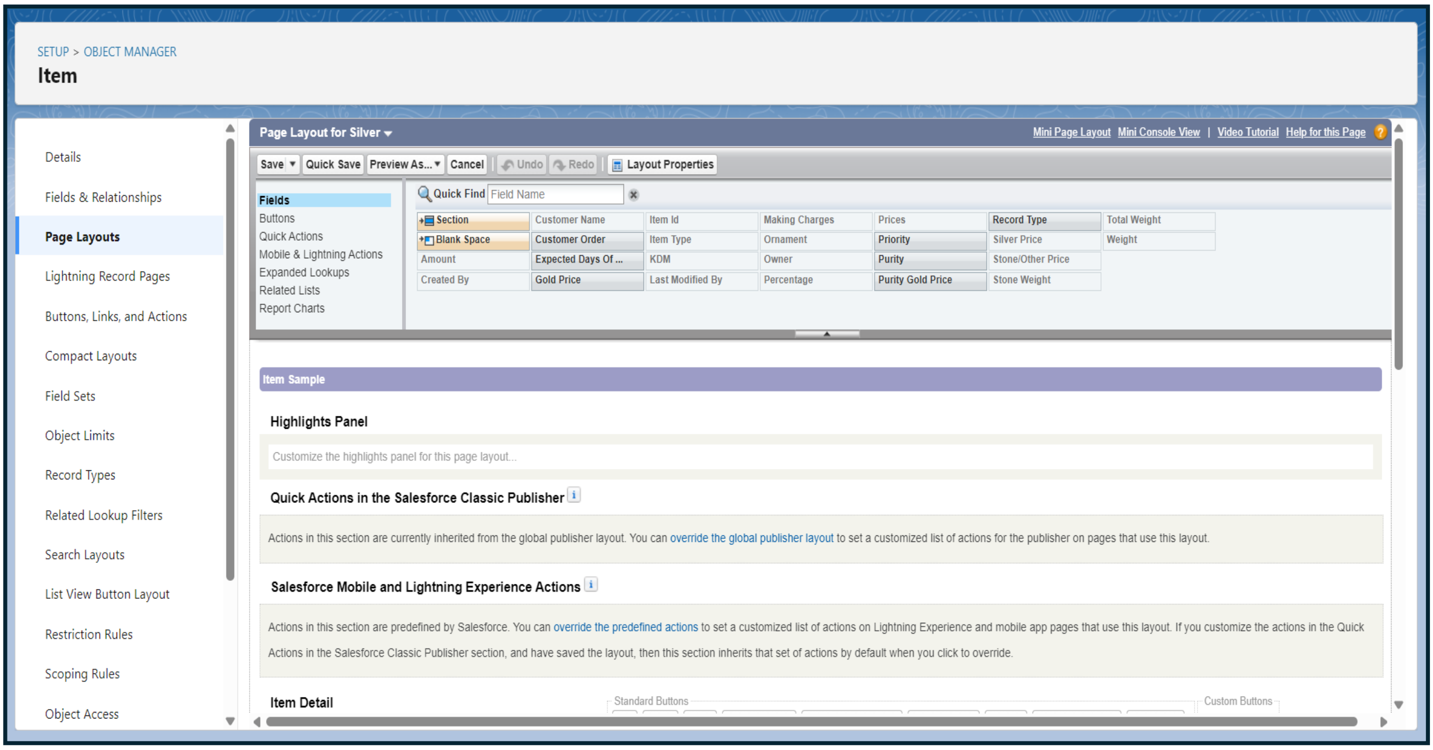




Creating Page Layout:

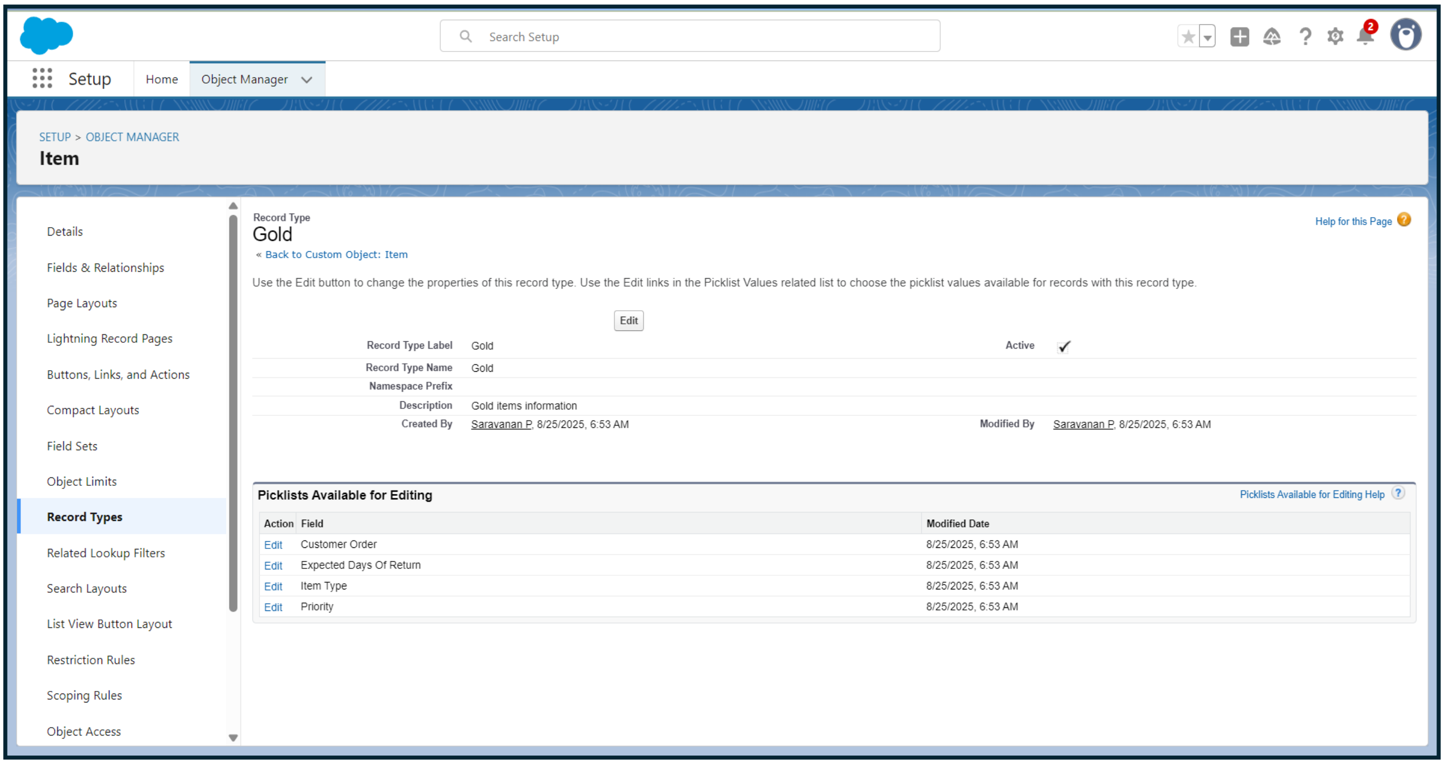
Create Page Layout for Gold and Silver

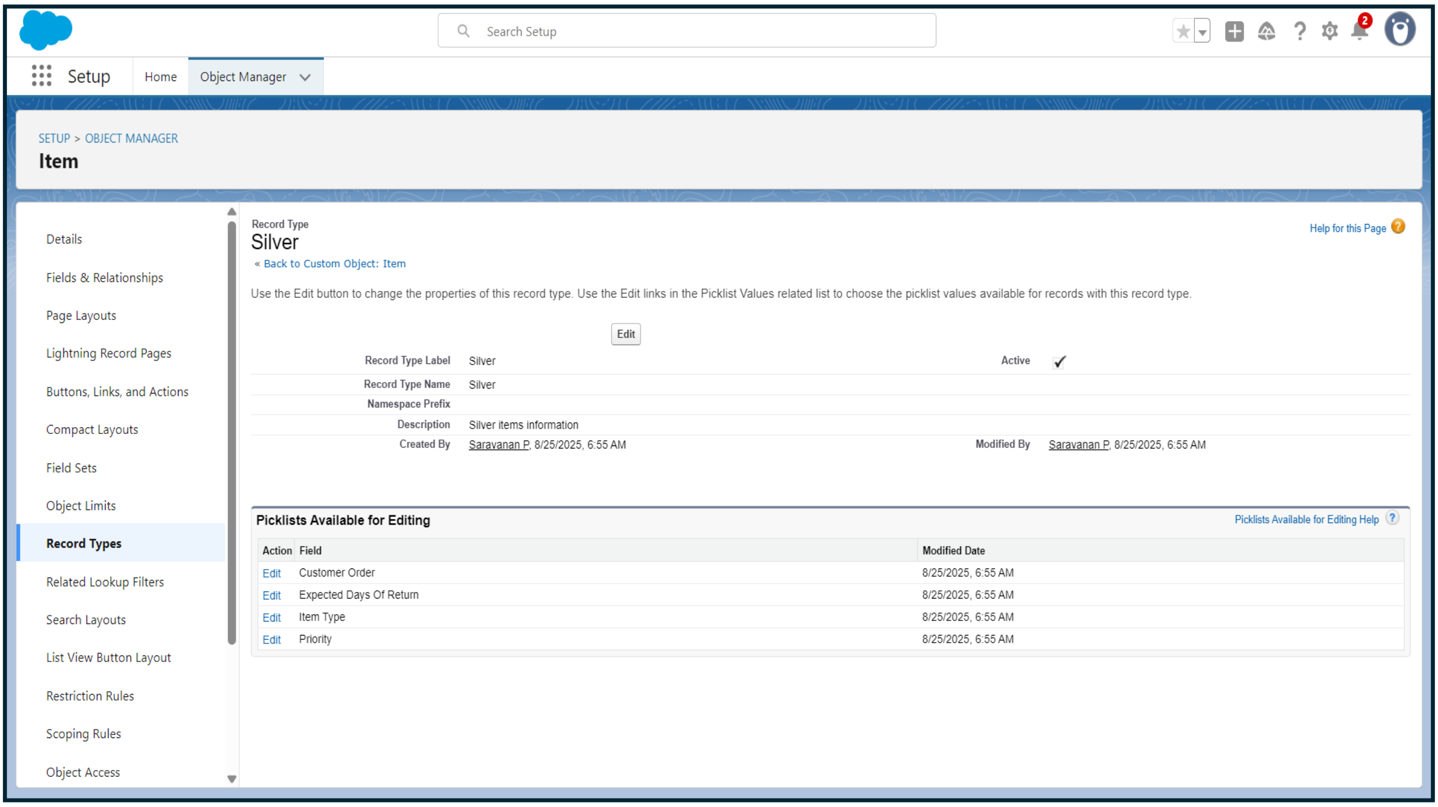




Creating Record Types:

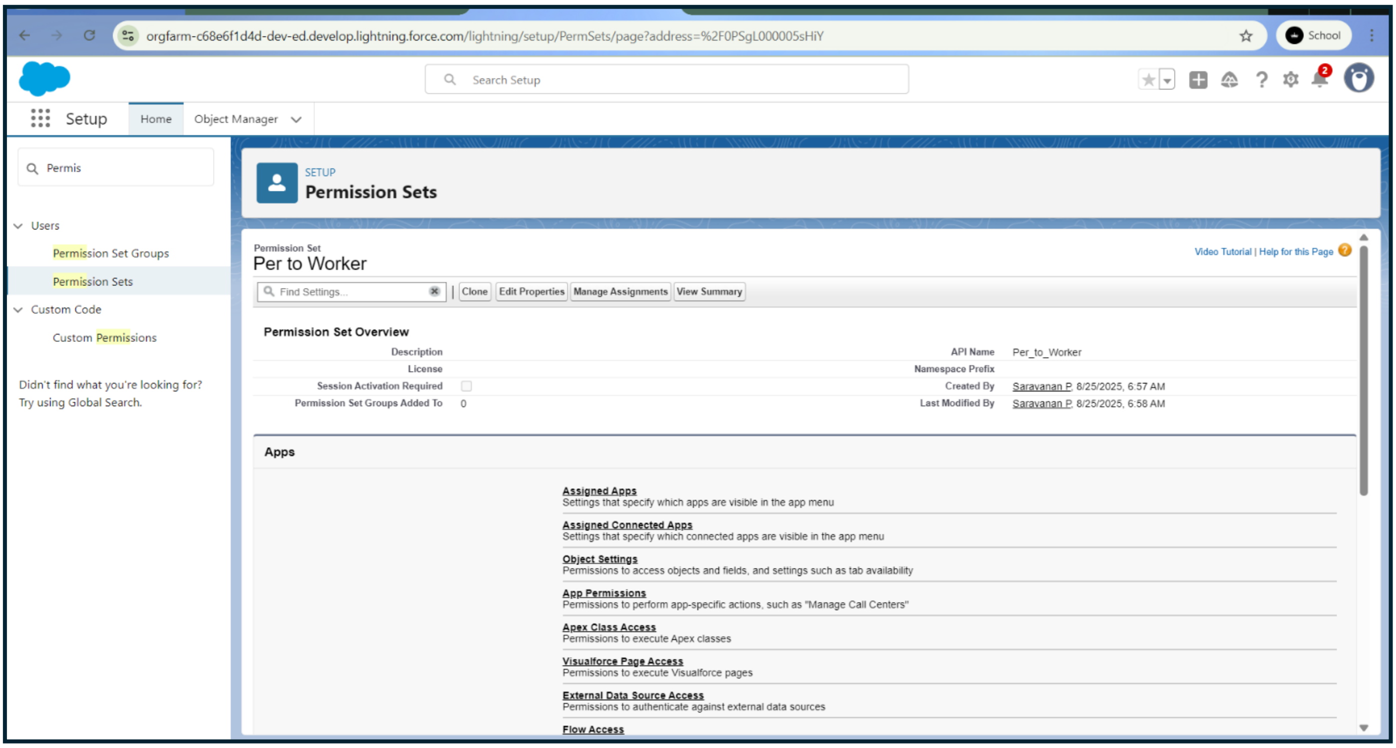
Create record types for Gold and Silver





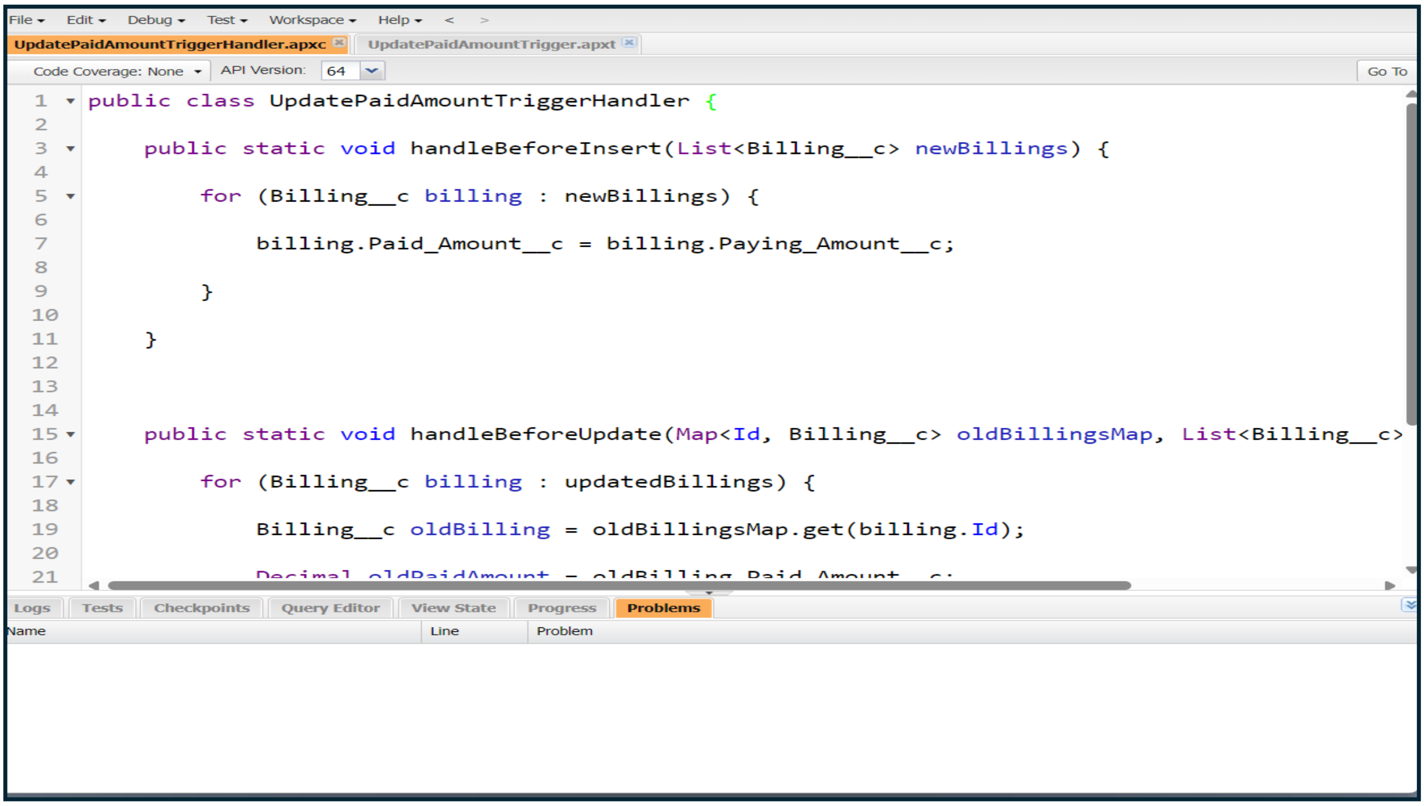
Creating Permission Sets:

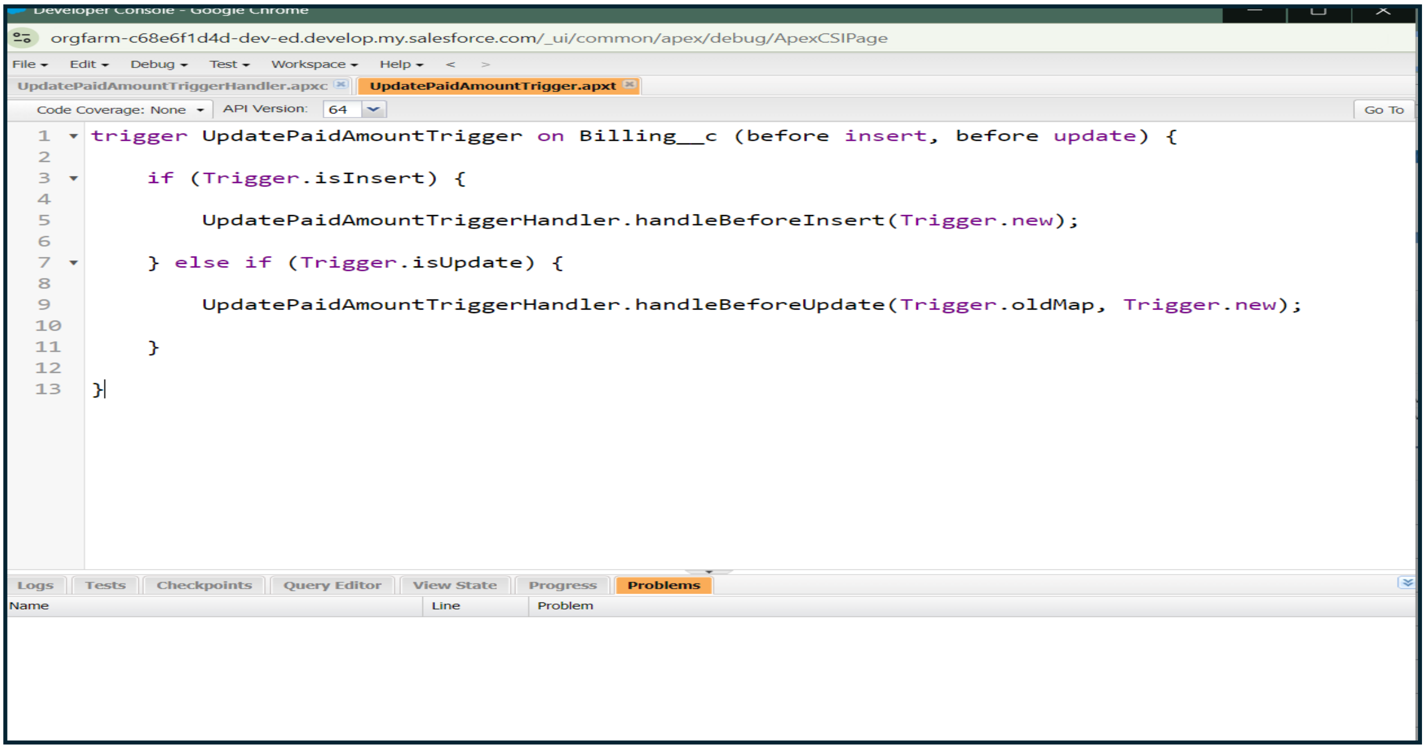
Create a Permission Set named Per to Worker



Creating Trigger:

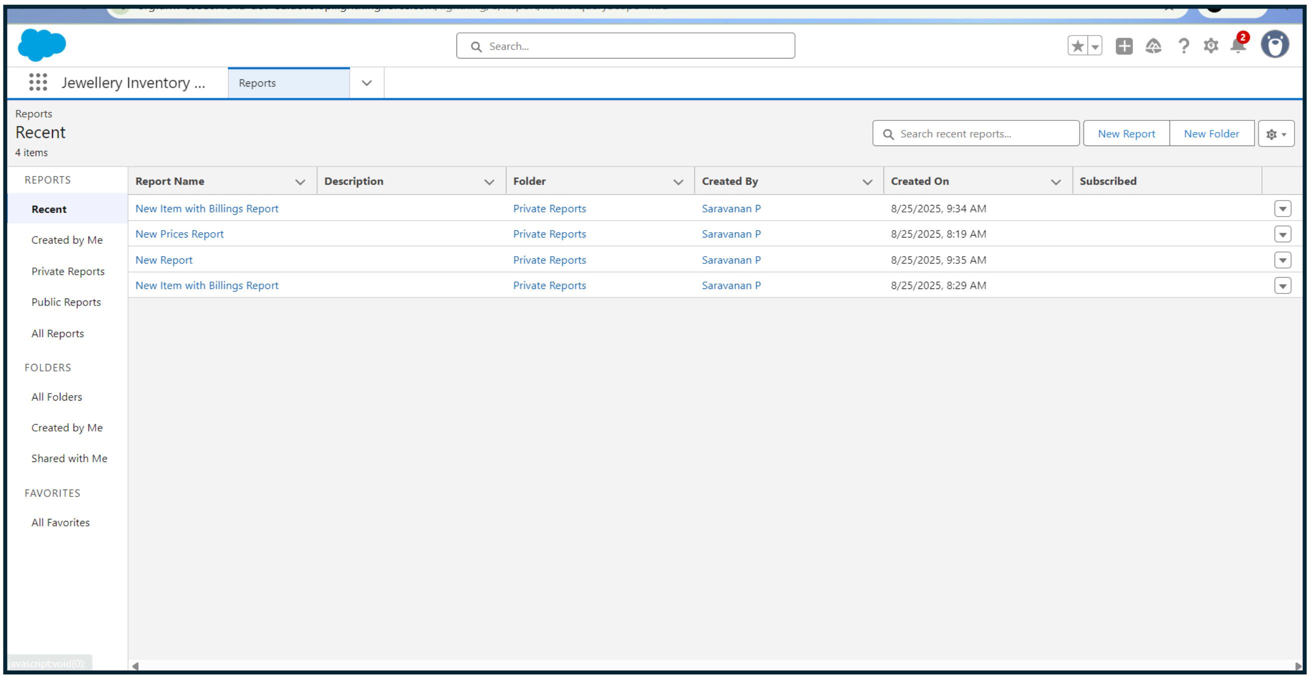
Create a Trigger handler class and a Trigger





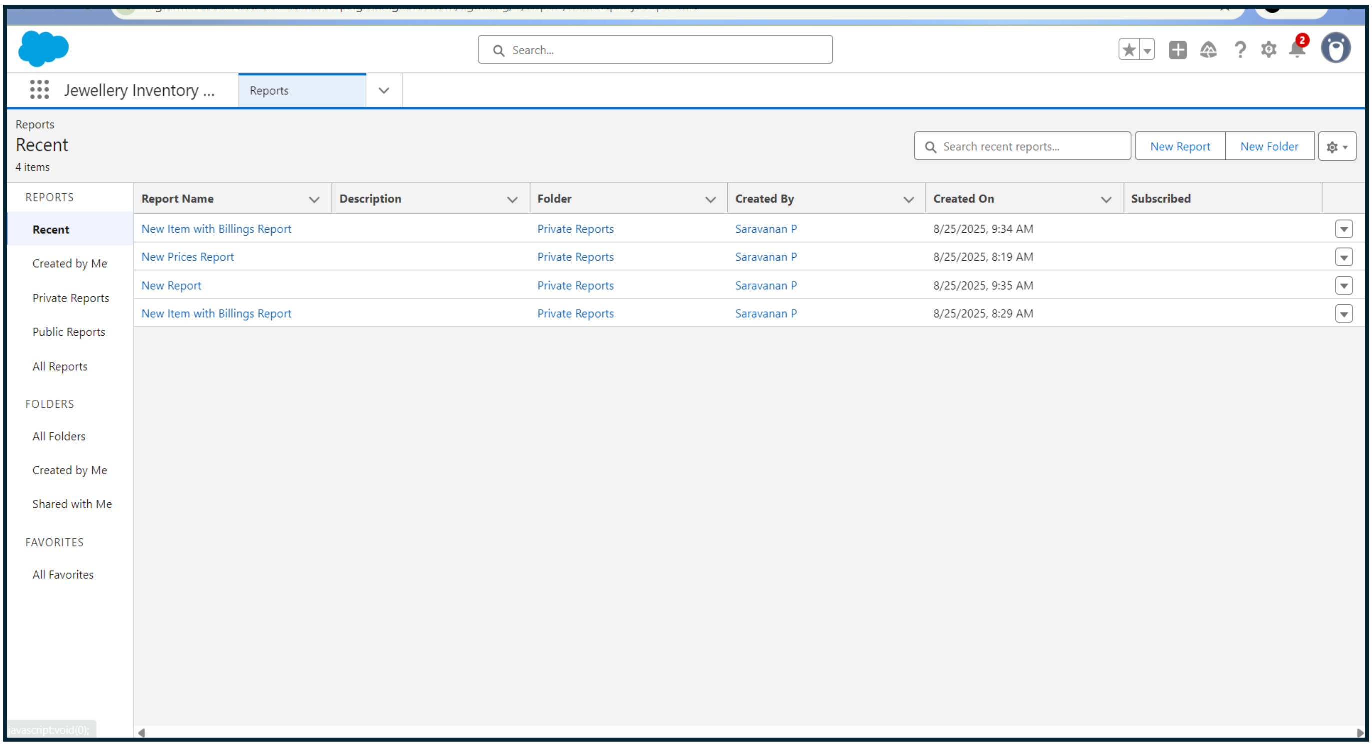
Creating Report:

Create a new Report in the Report Tab



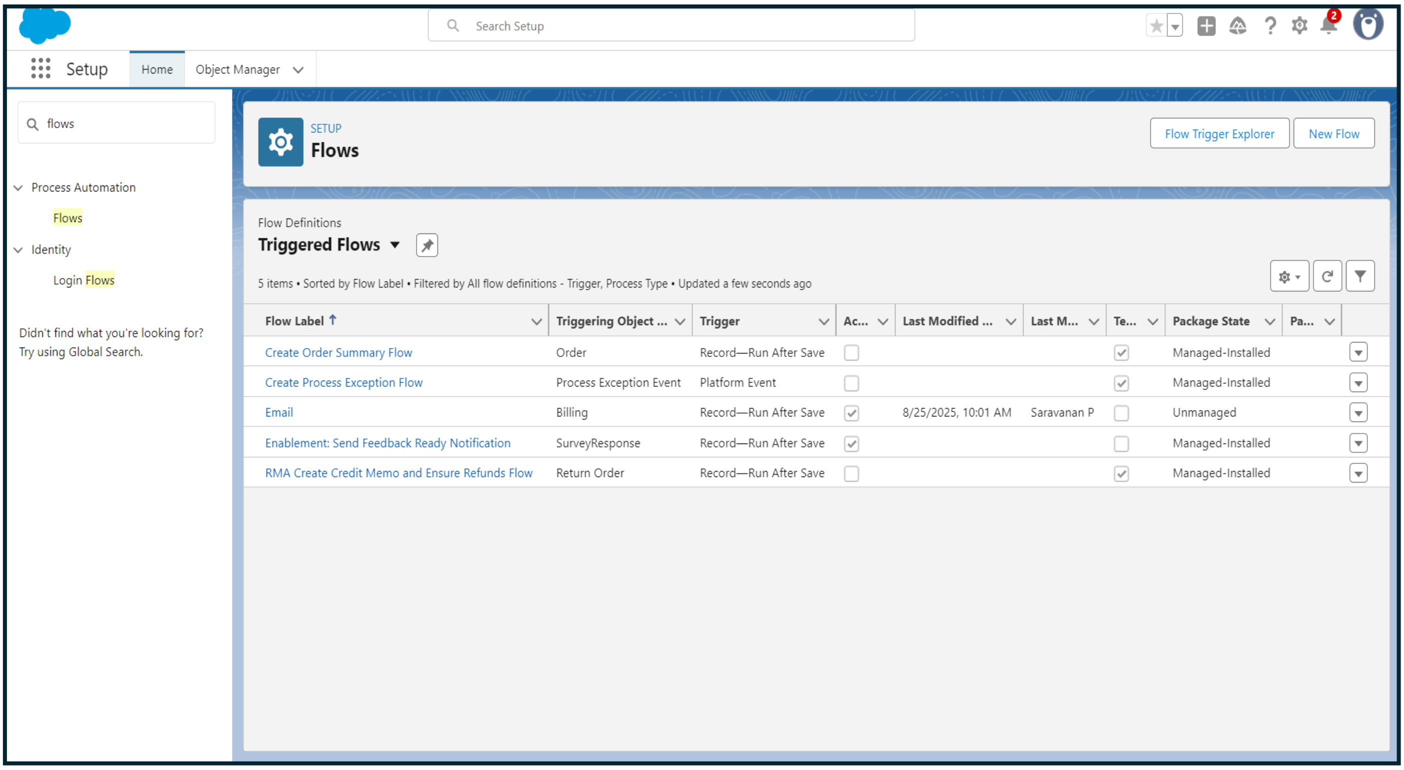
Creating Dashboard:

Create Dashboard from Dashboard Tab



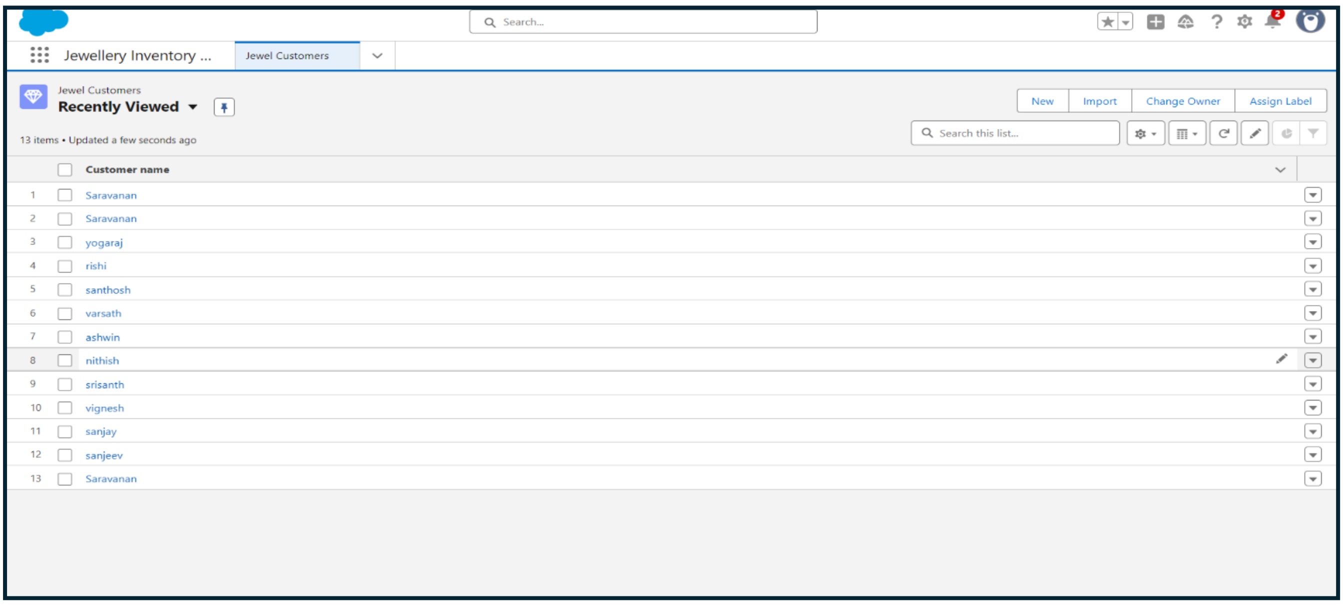
Creating a Flow:

Create a triggered Flow

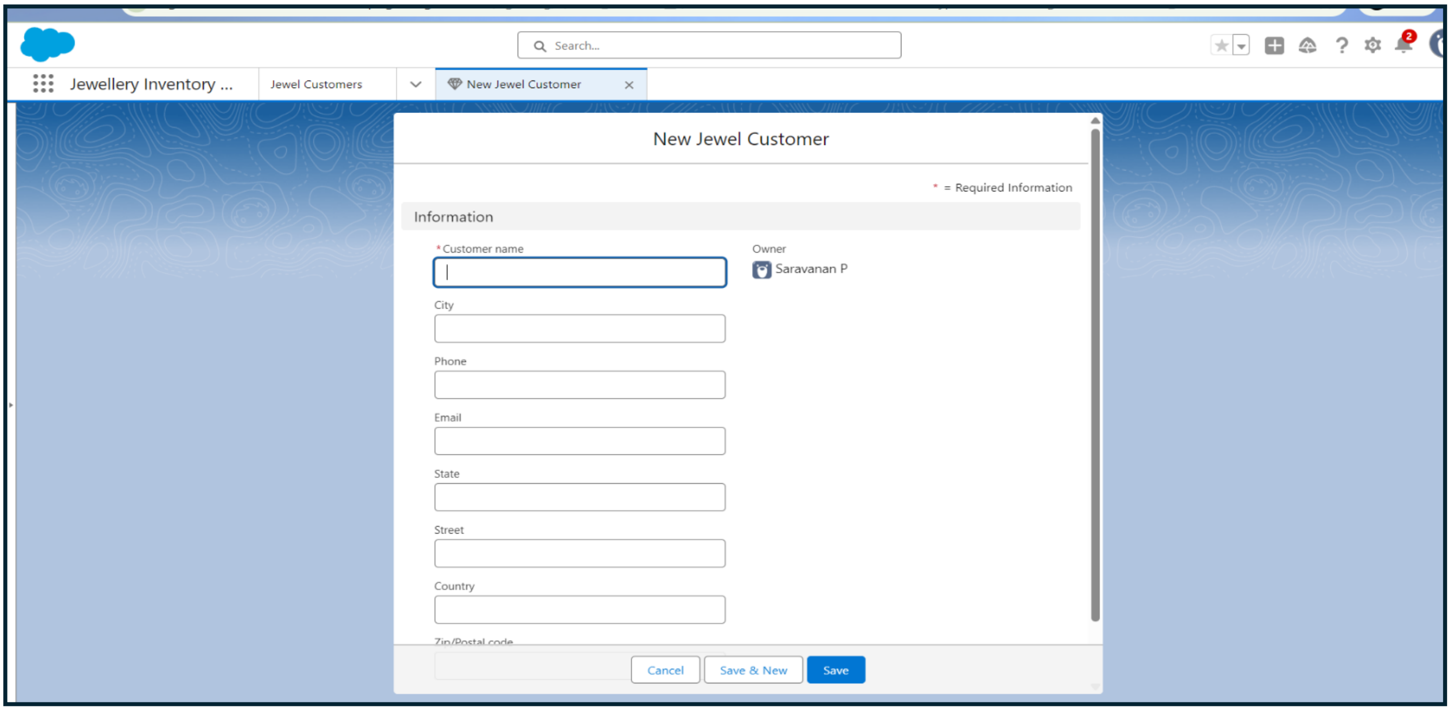


3.Result:

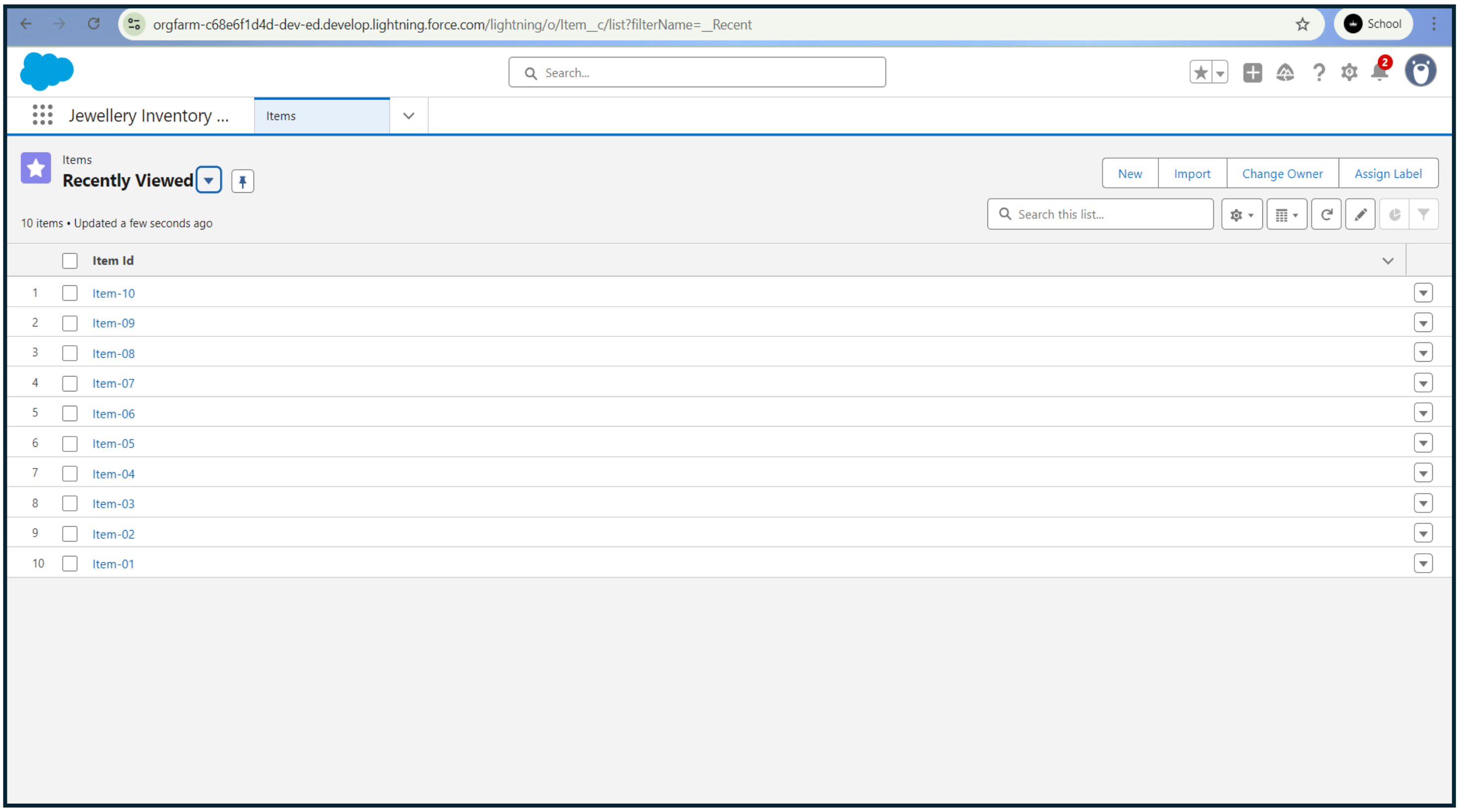
Jewel Customer Tab:



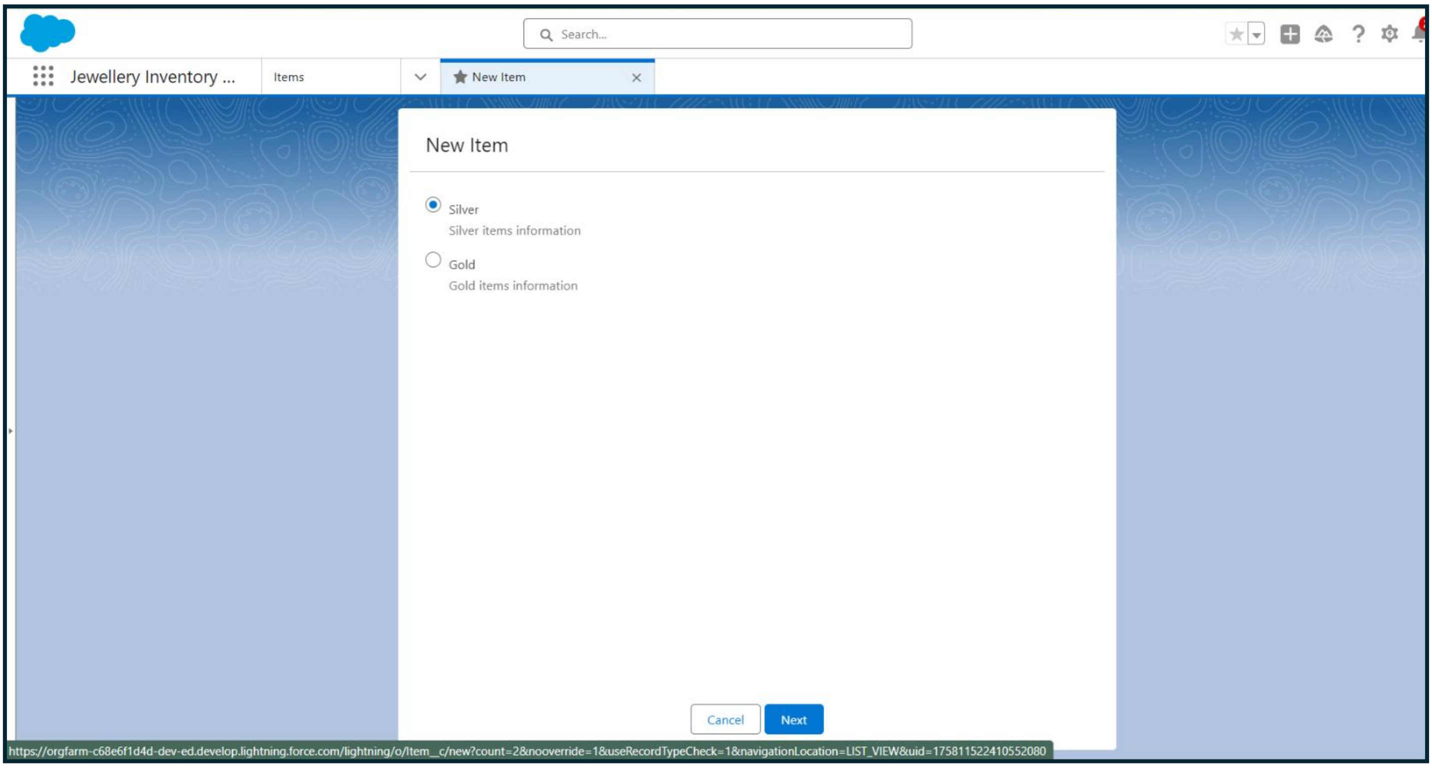
Adding New Jewel Customer:



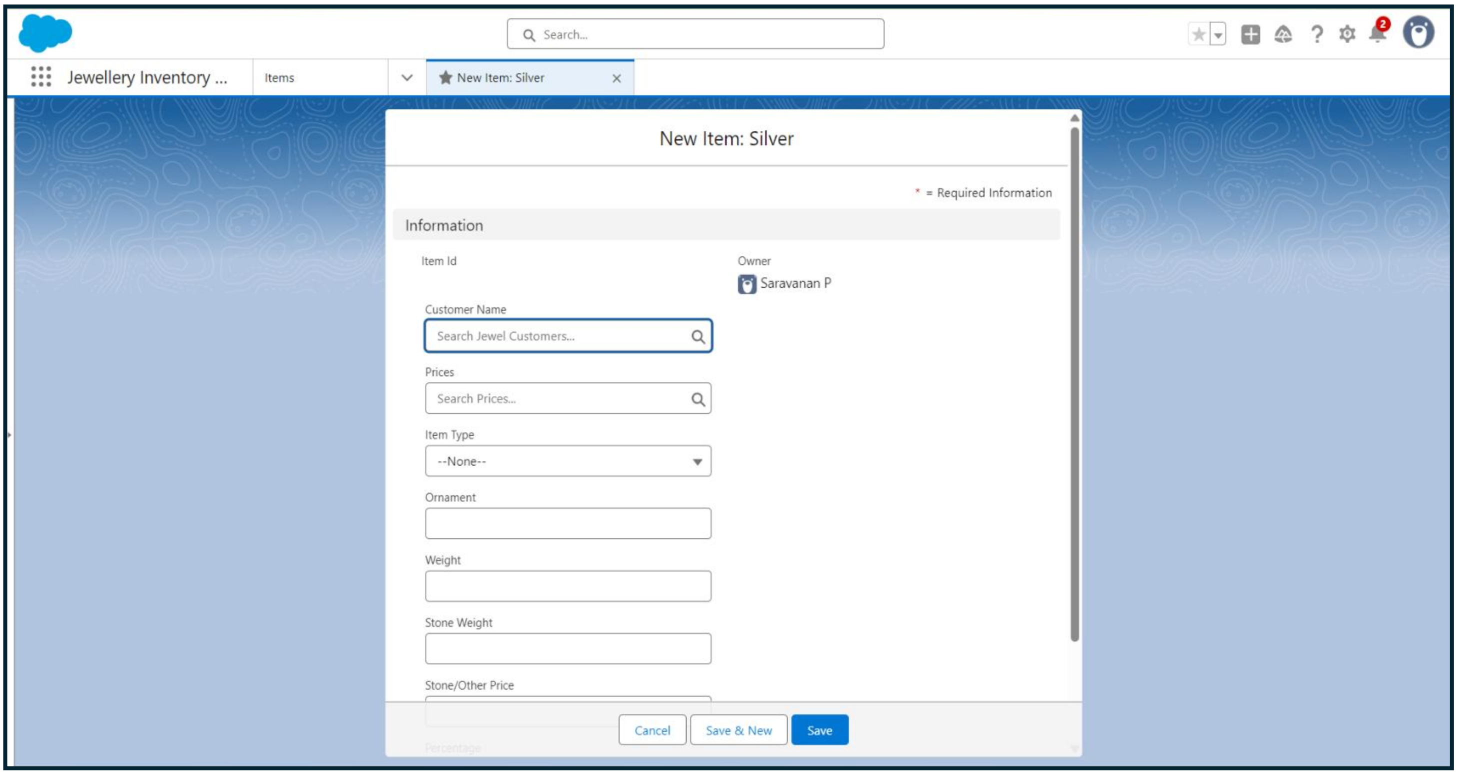
Items Tab:



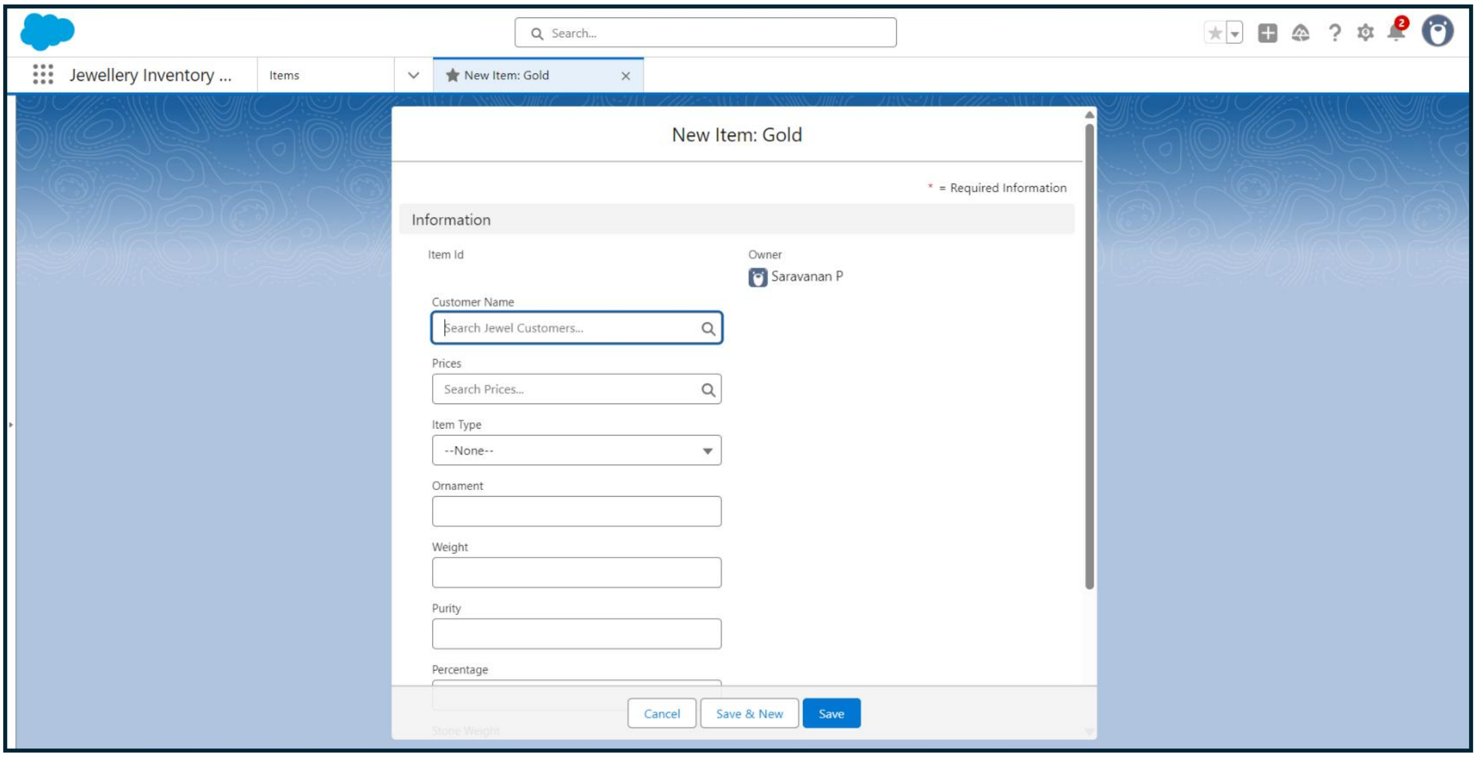
Adding New Items:



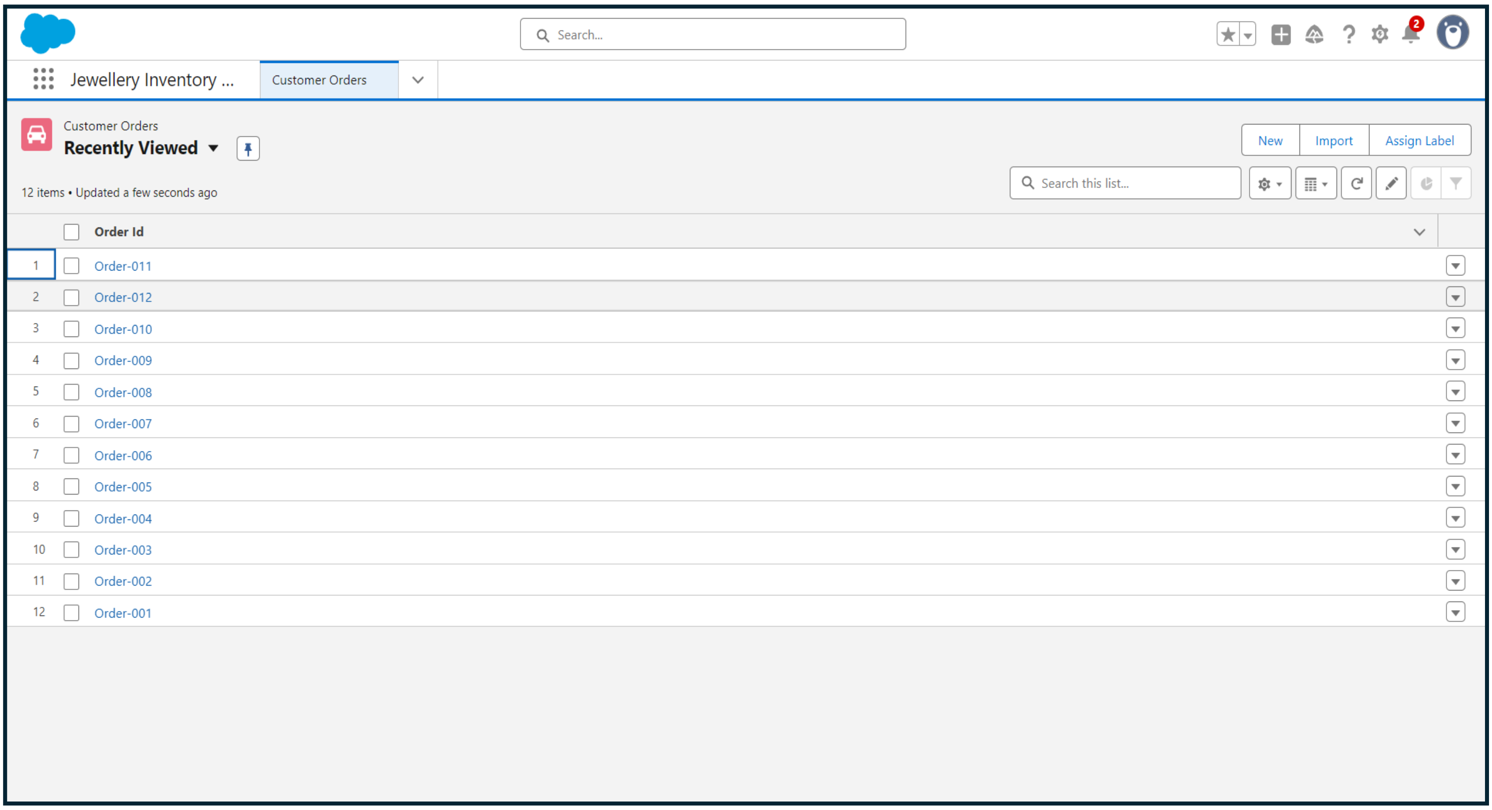
Adding New Items For Silver:



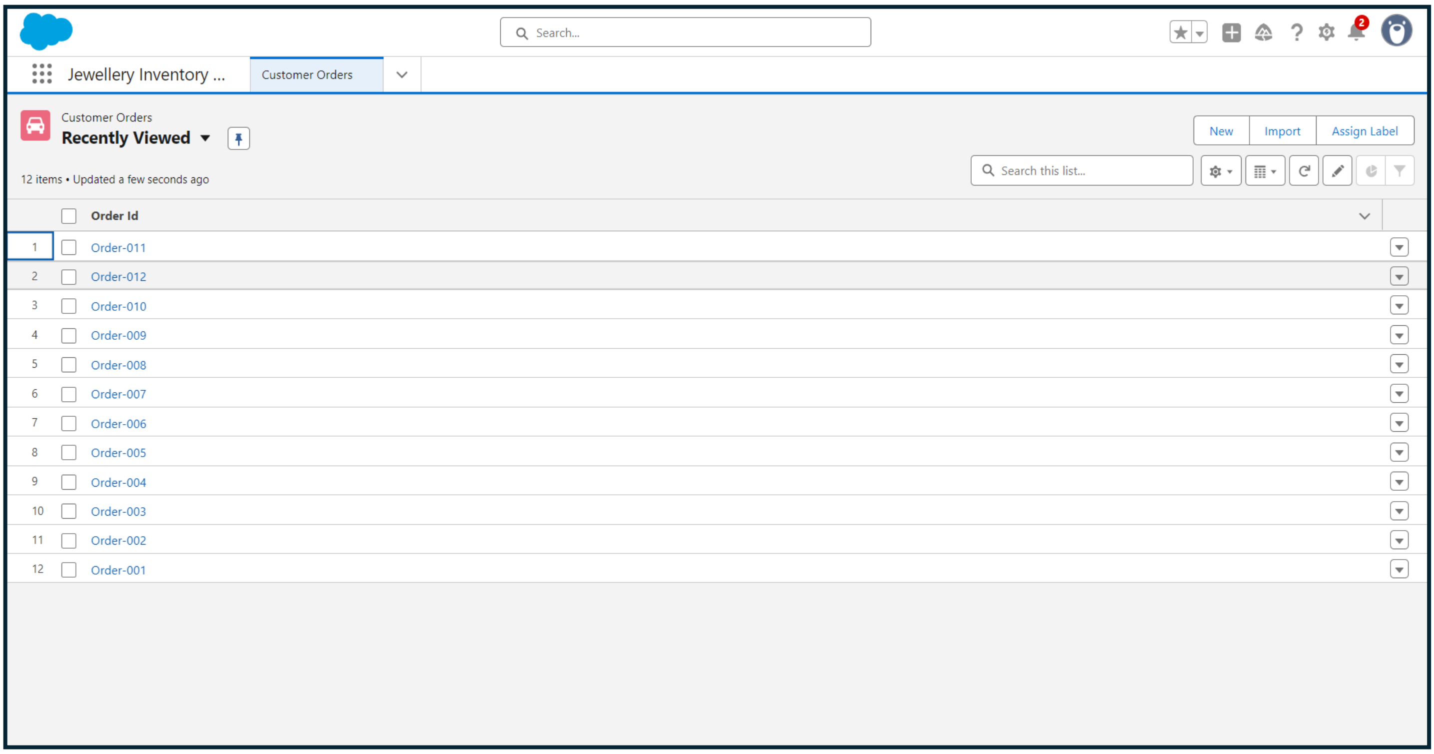
Adding New Items For Silver:

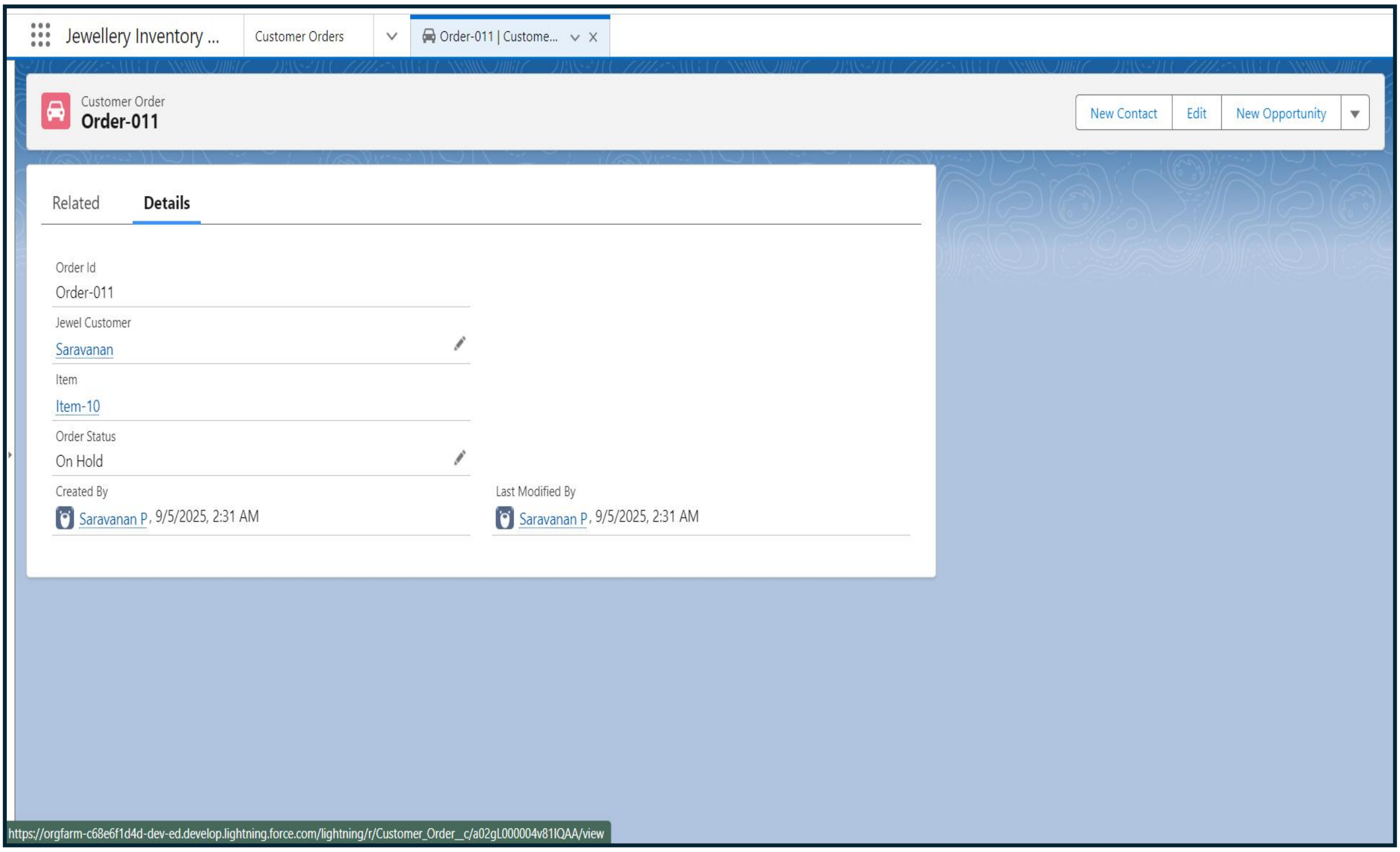


Customer Orders Tab:

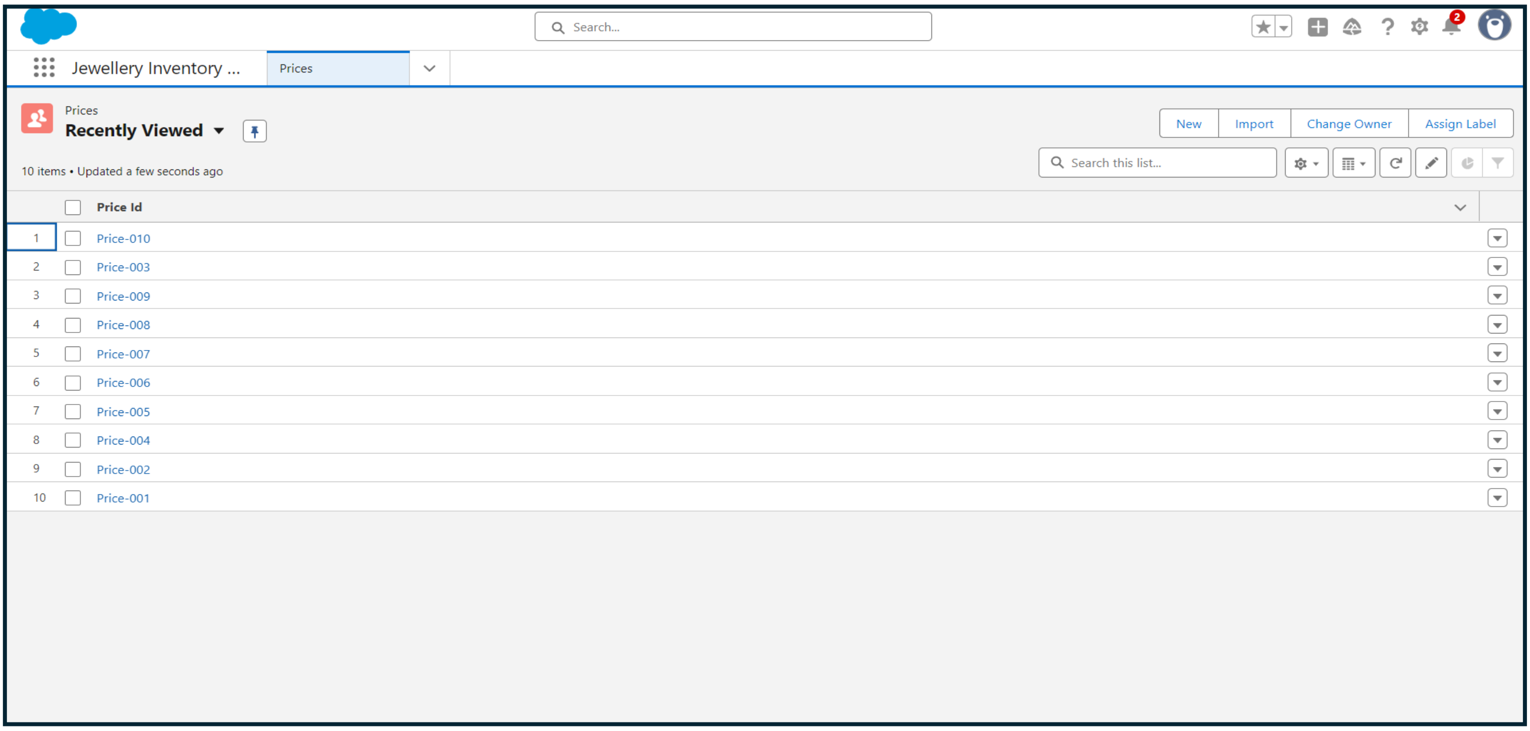


Adding New Customer Orders:

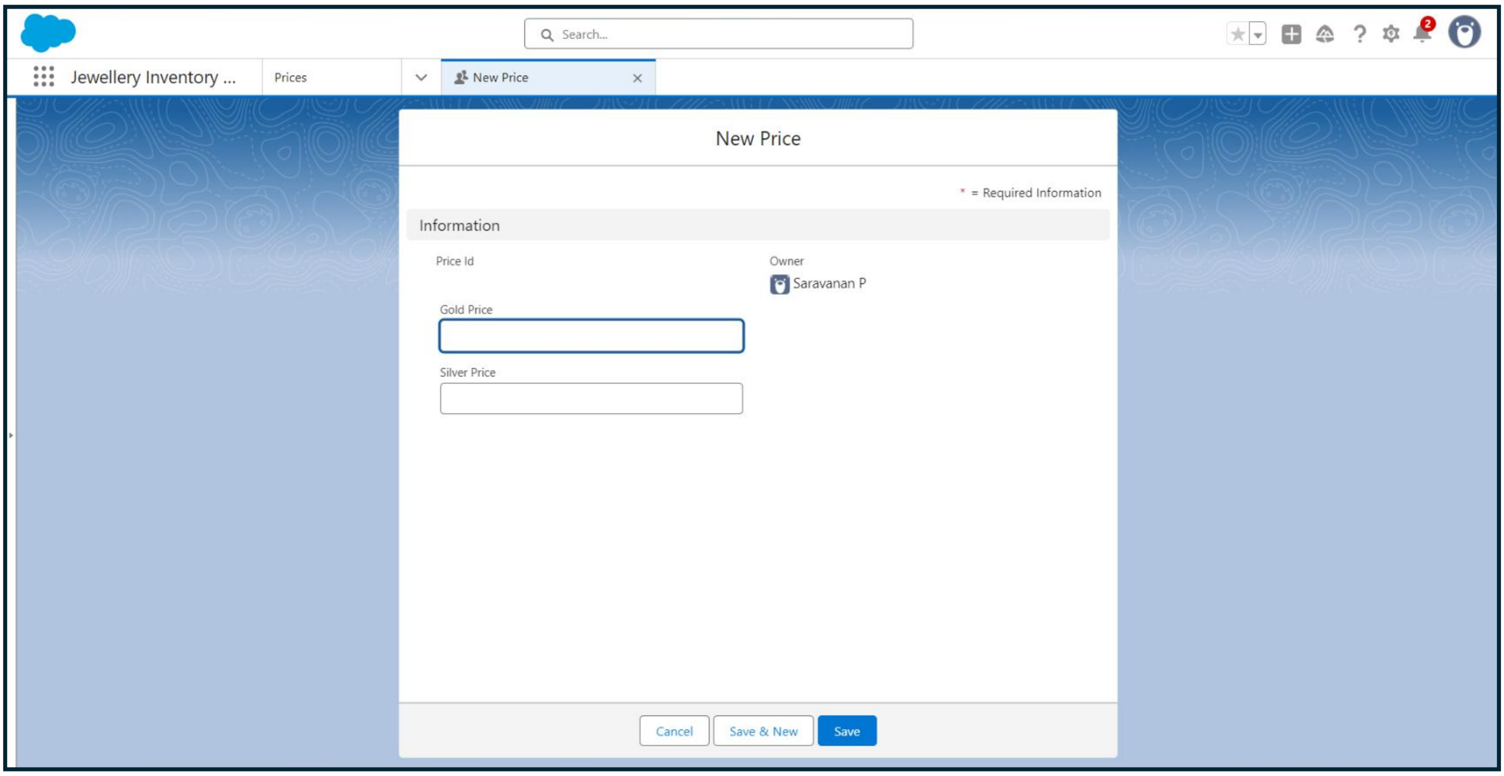


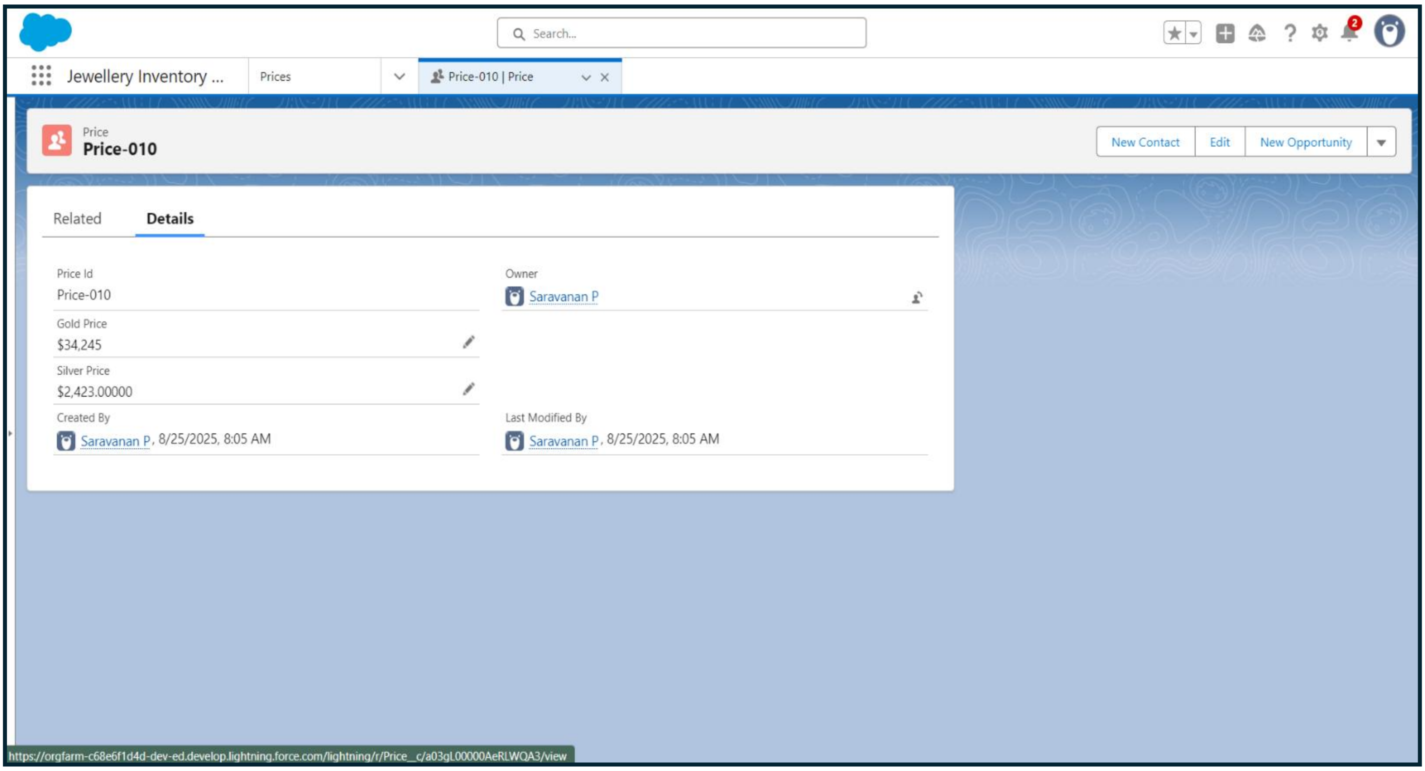


Prices Tab:

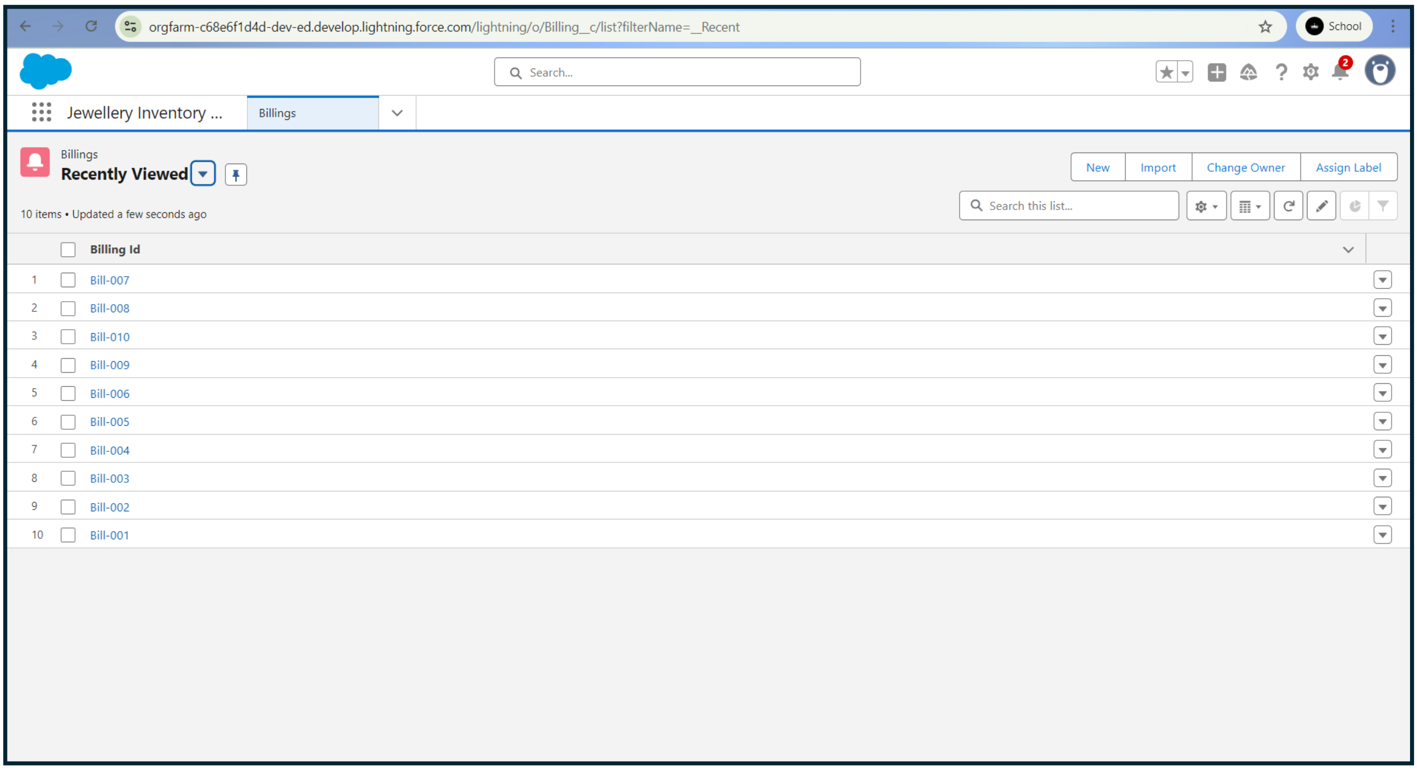


Adding New Price:

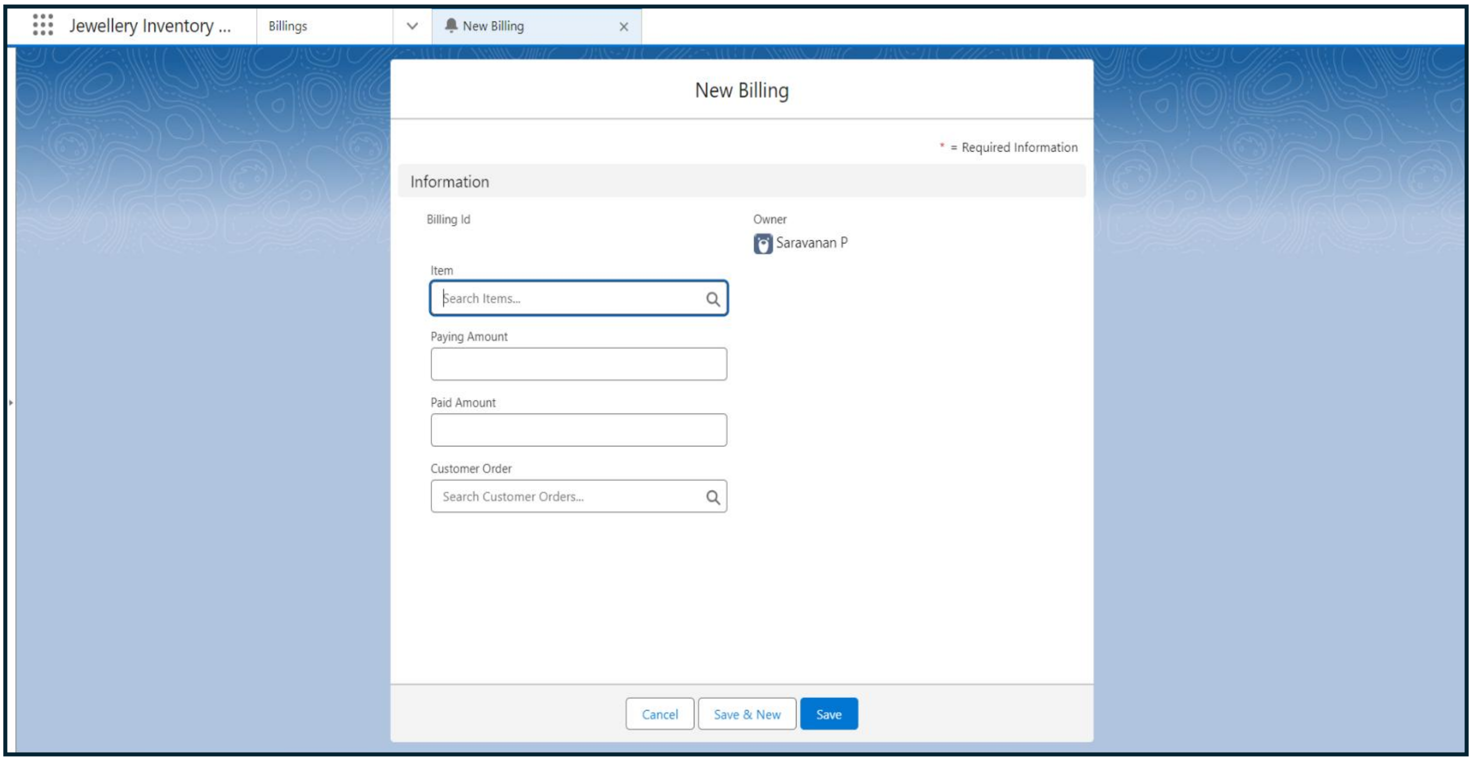


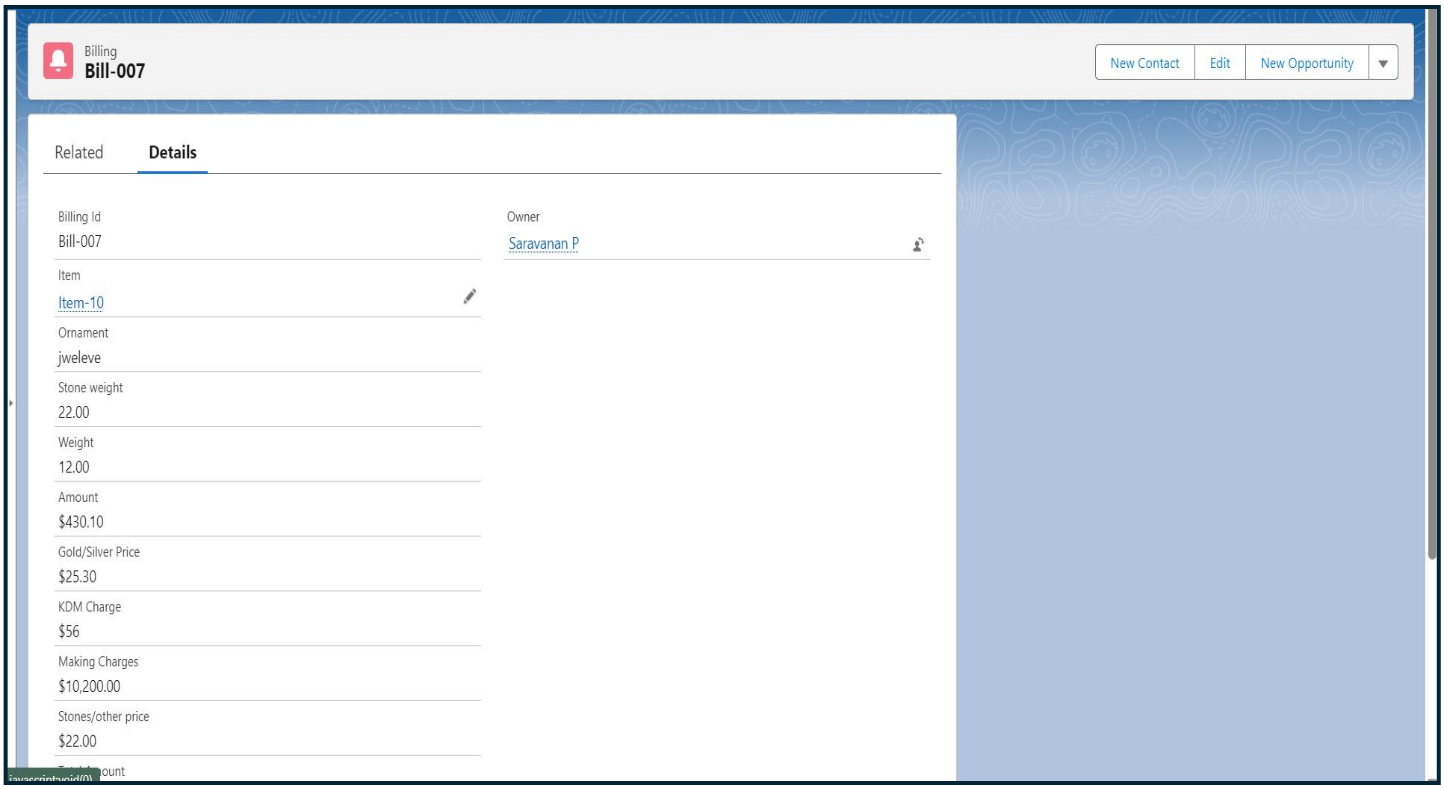

Search...
Jewellery Inventory ...
Prices
Price-010 | Price
Price
Price-010
New Contact
Edit
New Opportunity
Related
Details
Price Id
Price-010
Owner
Saravanan P
Gold Price
$34,245
Silver Price
$2,423.00000
Created By
Saravanan P, 8/25/2025, 8:05 AM
Last Modified By
Saravanan P, 8/25/2025, 8:05 AM
https://orgfarm-c68e6f1d4d-dev-ed.develop.lightning.force.com/lightning/r/Price__c/a03gL00000AeRLWQA3/view

Billing Tab:

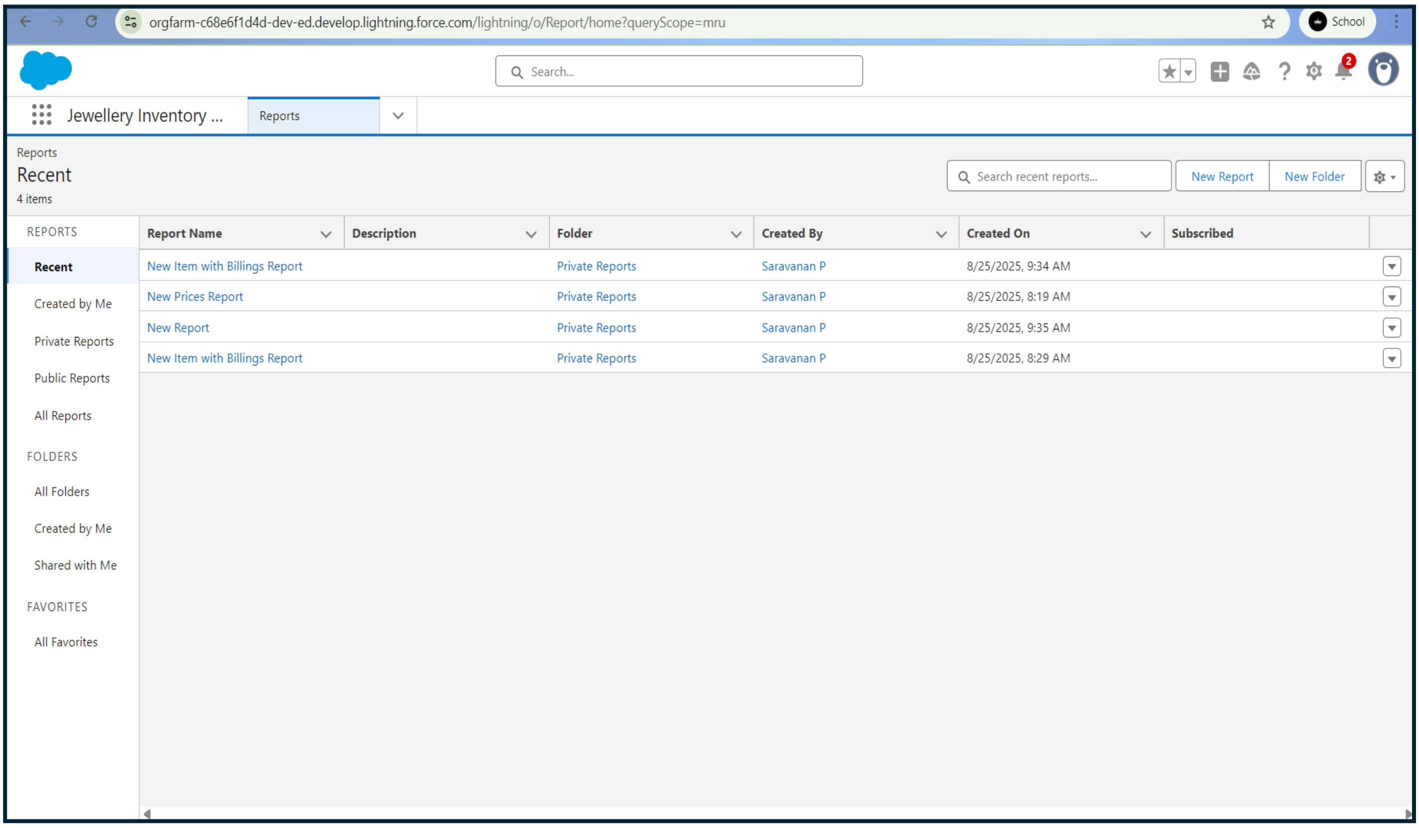

orgfarm-c68e6f1d4d-dev-ed.develop.lightning.force.com/lightning/o/Billing__c/list?filterName=__Recent
School
Search...
Jewellery Inventory ...
Billings
Billings
Recently Viewed
New
Import
Change Owner
Assign Label
10 items • Updated a few seconds ago
Search this list...
Billing Id
1 Bill-007
2 Bill-008
3 Bill-010
4 Bill-009
5 Bill-006
6 Bill-005
7 Bill-004
8 Bill-003
9 Bill-002
10 Bill-001

Adding New Billing:

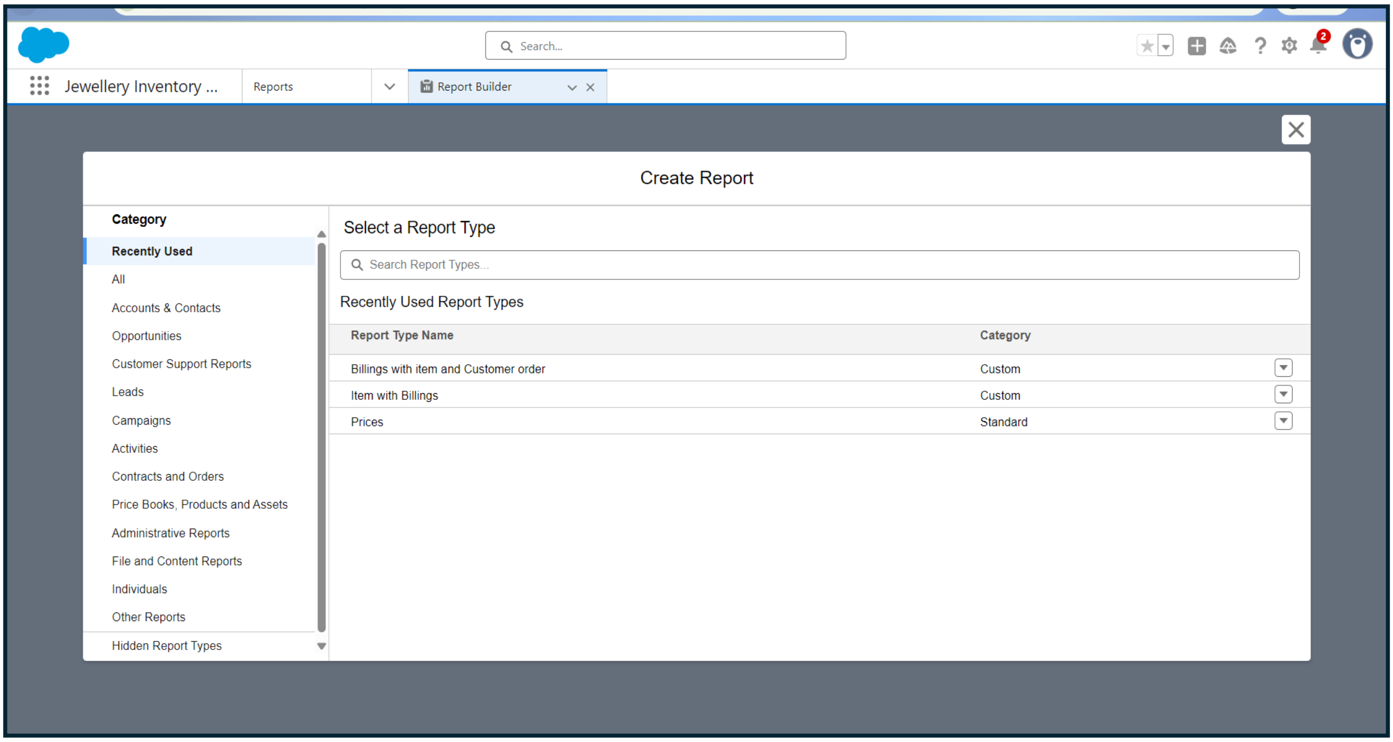


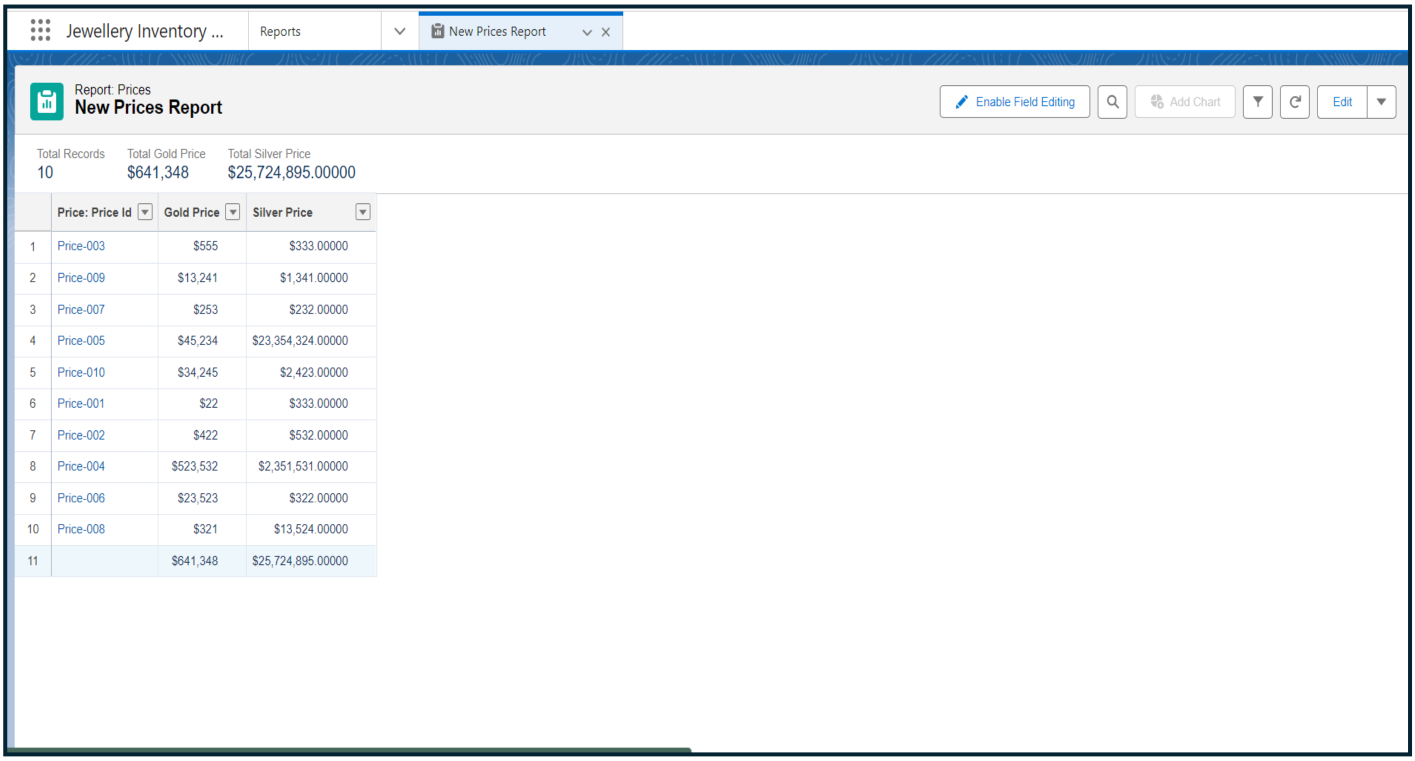


Reports Tab:

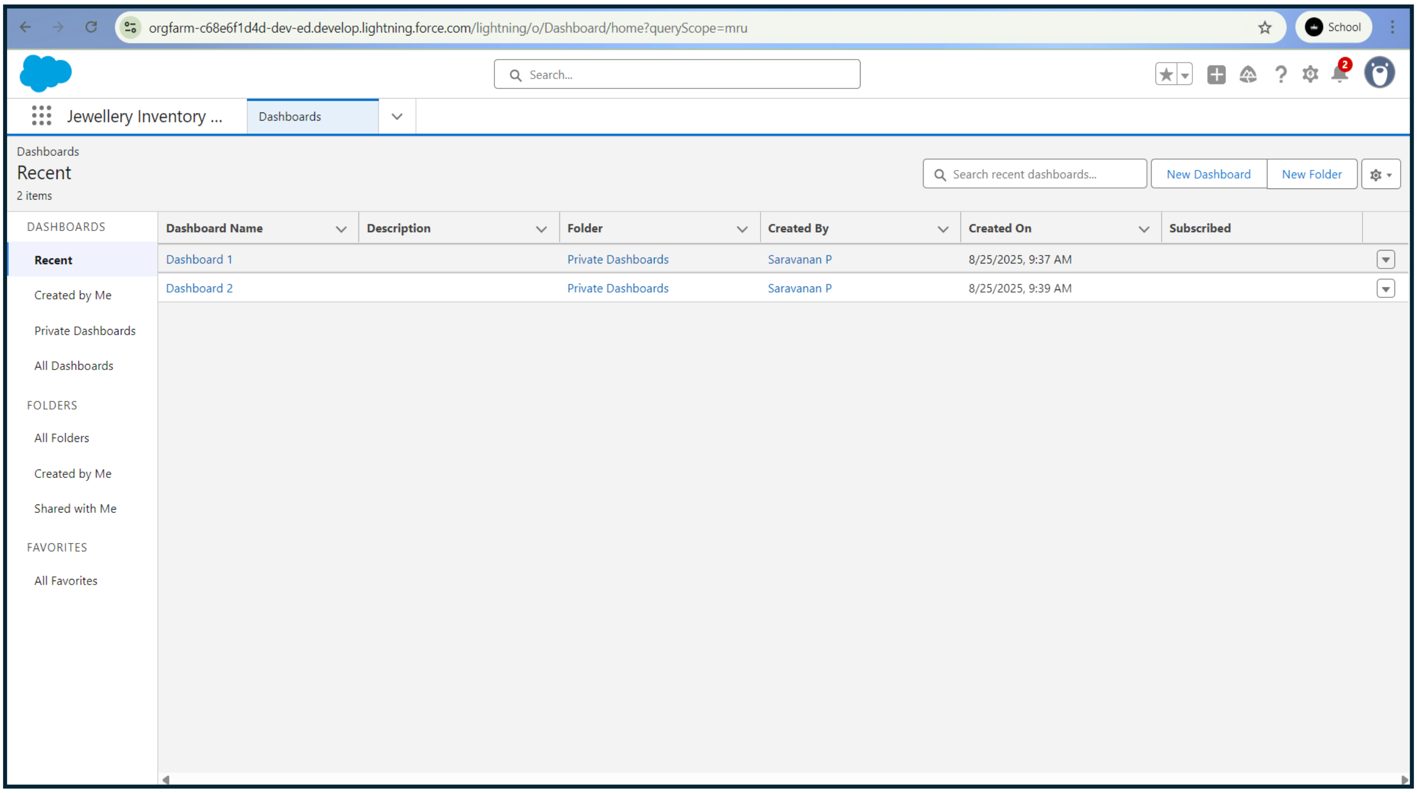


Creating a Report:

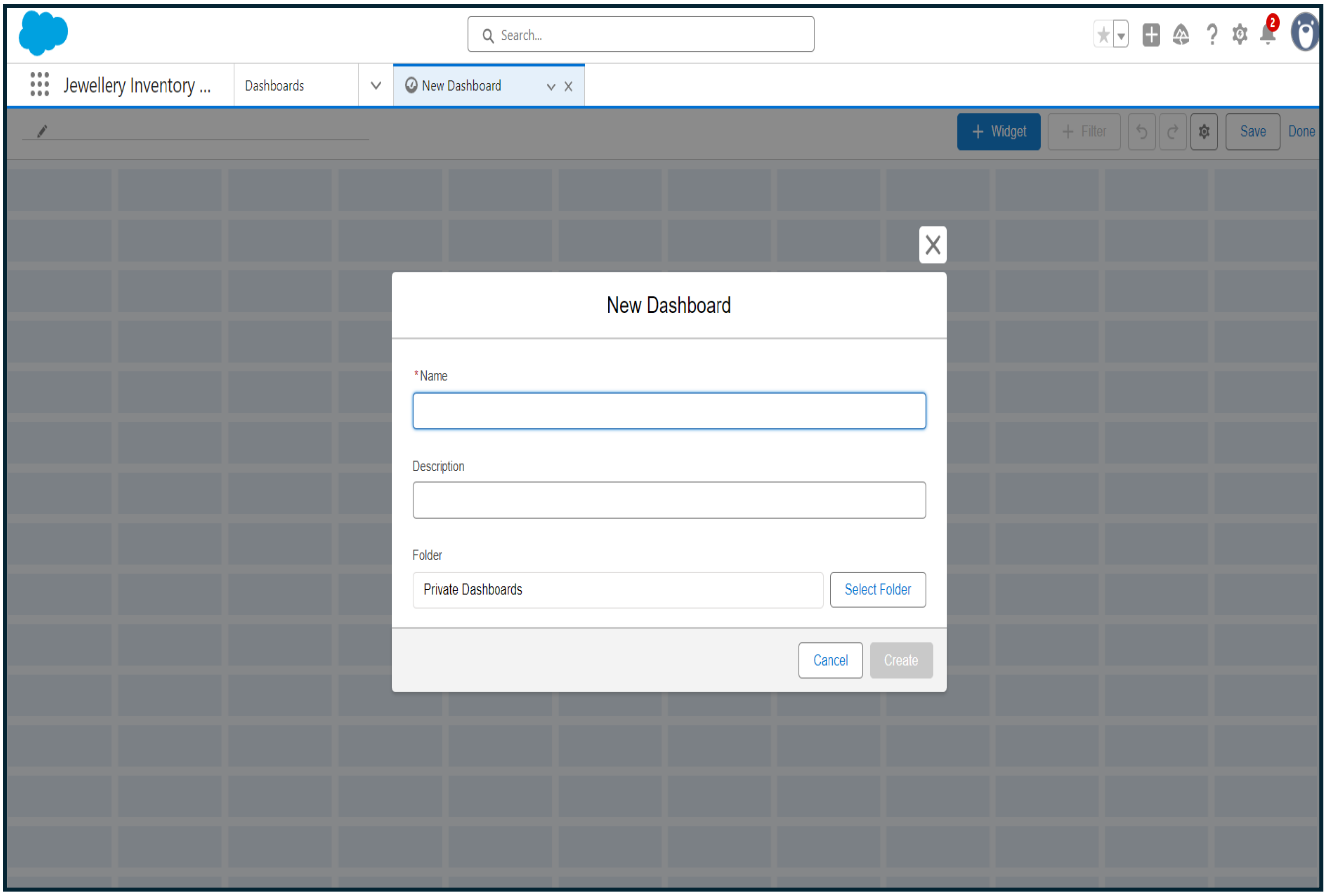


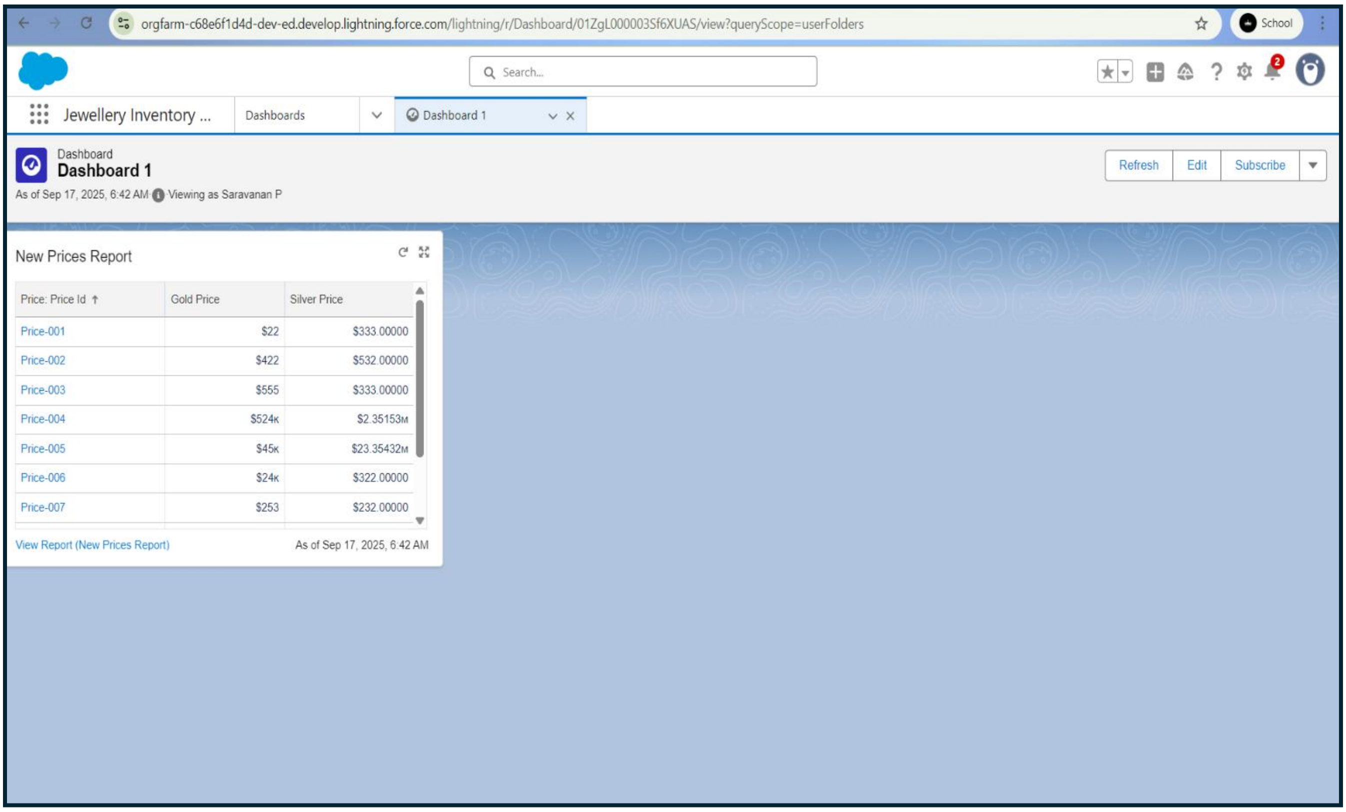


Dashboard Tab:



Adding A New Dashboard:





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

<u>UpdatePaidAmountTrigger.apxt</u>

```
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;
    }
  }
}
```