

**DEPARTMENT OF COMPUTER SCIENCE AND
ENGINEERING
NAANMUTHALVAN**

SALESFORCE DEVELOPER – ZONE 16

PROJECT TITLE: CRM application for jewel management

Submitted By

JohnjeyarajC

Mrs. B. Nancy, M.E.,

Assistant Professor & Supervisor

**PSN INSTITUTE OF TECHNOLOGY AND SCIENCE
TIRUNELVELI**

ANNA UNIVERSITY, CHENNAI

PSN

Instituteoftechnologyandscience-Tirunelveli ANNA
UNIVERSITY : CHENNAI 600025

Bonafidecertificate

This is to certify that this skill training report "SB8067-SALESFORCE DEVELOPER" is the bonafide work of (Name & Reg. No who have carried out the tasks and project work under my supervision.

SIGNATURE

Dr.J.PrinceAntonyJoel, Head
of Department,
Department of Computer Science and Engineering,
PSN Institute of Technology & Science,
Tirunelveli - 627152

SIGNATURE

Mr.B.Nancy,M.E.,
Assistant Professor & Supervisor,
Department of Computer Science and Engineering,
PSN Institute of Technology & Science,
Tirunelveli - 627152

Submitted for the viva voce examination held on

INTERNAL EXAMINER

EXTERNAL EXAMINER

TABLE OF CONTENTS

CHAPTER	CONTENT
1	Project Definition
2	Abstract
3	Objectives of the Project
4	Software Requirements
5	Modules in the System
6	Implementation details
7	Output Screenshots
8	Conclusion

CRM APPLICATION FOR JEWEL MANAGEMENT

Project Definition

The Jewel Inventory System is a comprehensive software solution designed to streamline and manage the inventory and sales processes of a jewellery store or a jewellery manufacturer. The system aims to provide an efficient and user-friendly solution to track and control the inventory of various jewellery items, maintain accurate records, and facilitate seamless sales transactions. It also enables real-time monitoring of stock levels and generates detailed reports for better decision-making. The system helps reduce manual errors, save time, and enhance overall operational efficiency. Additionally, it ensures secure data handling and supports smooth communication between customers, suppliers, and management.

Abstract

The **CRM Application for Jewel Management** is a Salesforce-based project designed to automate and streamline the operations of a jewellery business. This application efficiently manages the inventory, sales, and customer data of jewellery stores and manufacturers within a single, cloud-based platform. It helps maintain detailed records of jewellery items such as gold, silver, diamond, and gemstone pieces, along with their weight, purity, and price. The system also simplifies day-to-day business tasks like purchase order tracking, supplier management, and sales processing, ensuring all business activities are well-organized and easily accessible.

Built using Salesforce features such as **Custom Objects, Record-Triggered Flows, Validation Rules, and Reports & Dashboards**, the system ensures accurate tracking of jewellery items, seamless sales transactions, and effective customer relationship management. It enables users to monitor stock levels in real-time, generate automated invoices, and analyze sales performance through interactive dashboards. Moreover, the use of **Automation and Approval Processes** helps reduce manual workload, while maintaining consistency and accuracy in operations.

By leveraging Salesforce automation and data management capabilities, the project enhances business productivity, minimizes manual effort, and improves decision-making. It supports role-based access, ensuring data security and controlled access for different users such as administrators, sales staff, and managers. Overall, the system provides a secure, scalable, and user-friendly CRM solution tailored to meet the specific operational needs of the jewellery industry, empowering businesses to deliver better customer service and achieve sustainable growth.

Objectives of the project

- To automate jewellery business operations using **Salesforce CRM**.
- To manage **inventory and track stock levels in real-time**.
- To streamline **sale transactions and automate billing processes**.

- To maintain accurate customer records and enhance customer relationships.
- To manage supplier details and monitor purchase orders efficiently.
- To ensure **data accuracy, security, and controlled user access**.
- To generate analytical reports and dashboards for performance monitoring.
- To provide a **user-friendly interface** for easy system navigation.
- To create a scalable and **flexible solution** for future business growth.

Software requirements

Platform

- Salesforce CRM (Cloud-Based Platform)

Operating System:

- Windows 10 or above
- macOS
- Web Browser Access

Web Browser

- Google Chrome
- Mozilla Firefox, or Microsoft Edge (Latest Version)

Database

- Salesforce Standard Database (Objects, Fields, and Relationships)

Tools Used

- Salesforce Flow Builder
- Process Builder
- Validation Rules, Reports & Dashboards
- Salesforce Developer Console

Programming Language:

- Apex (for custom logic) and SOQL (for queries)

User Interface

- Lightning App Builder and Salesforce Lightning Pages

Modules in the system:



Creating The Number
Field In Item Object

Creating Picklist Field In
Item Object

Creating Currency Field
In Price Object

Creating Formula
Field(Cross Object) In
Item Object

Creating Remaining
Fields In Objects

Schema Builder

Creating The Field
Dependencies

Creating The Validation
Rule

- Users

Create User

Create User

- Page Layouts

To Create A Gold Page
Layout

To Create A Silver Page
Layout

- Record Types

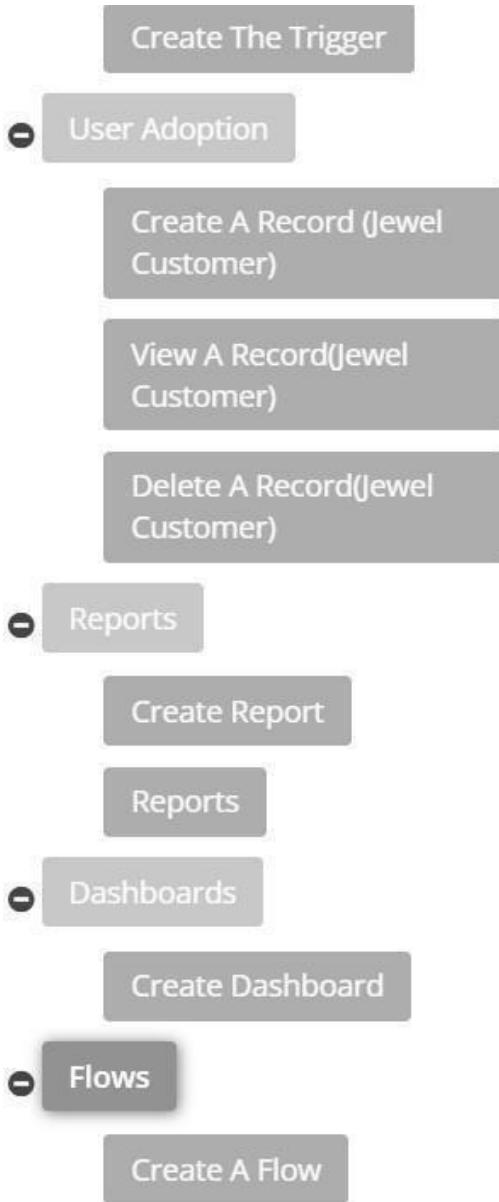
To Create A Record Type

- Permission Sets

Creating Permission Set

- Trigger

Create A Trigger Handler
Class



UserManagement:

Manages different user roles like Admin, GoldSmith, and Worker JW.

CustomerManagement:

Stores customer details, purchase history, and preferences.

ProductManagement:

Handles jewelry item details such as Gold, Silver, Diamond, and related properties.

PriceBookManagement:

Maintains product pricing for various categories and updates discounts.

OrderManagement:

Records customer orders, payments, and delivery status.

Reports&Dashboards:

Displays visual insights into sales, top customers, and performance.

Automation&Workflows:

Handles approval processes, reminders, and email notifications.

Implementation of the model

1.CreateJewelCustomerObject

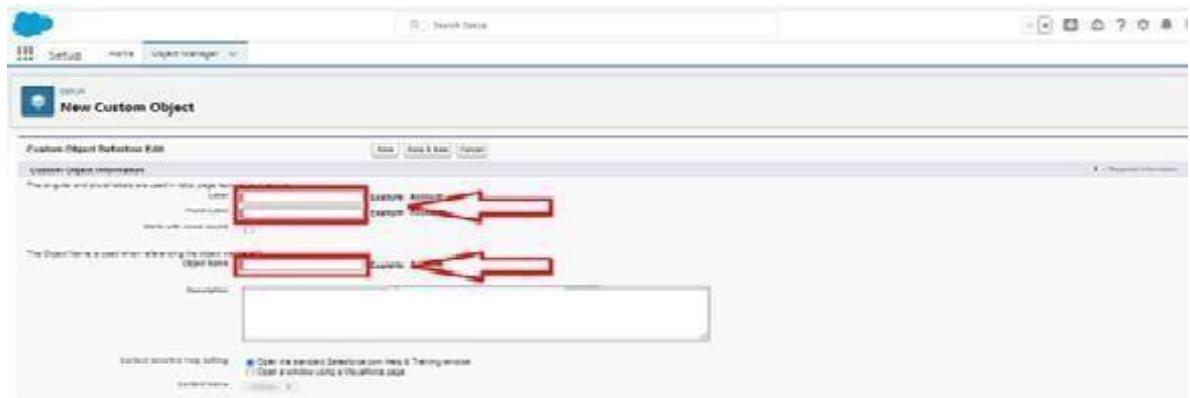
The purpose of creating a JewelCustomer custom object is to store and manage information about Customer.

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.



1. Enter the label name: JewelCustomer
2. Plural label name: JewelCustomers



3. Enter Record Name Label and Format
 - Record Name >> Customername
 - Data Type >> Text

2. Click on Allow reports.
3. Allow search and click Save.

2.CreateItemObject

The purpose of creating a Item object is to manage the inventory of gold and silver items. To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
 2. Enter the label name >> Item
 3. Plural label name >> Items
 4. Enter Record Name Label and Format
 - Record Name >> Item Id
 - Data Type >> Auto Number
 - Display Format >> Item-{00}
 - Starting Number >> 1
2. Click on Allow Reports.
 3. Allow Search >> Save.

3.Creating a Custom Tab

To create a Tab: (Customer)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)

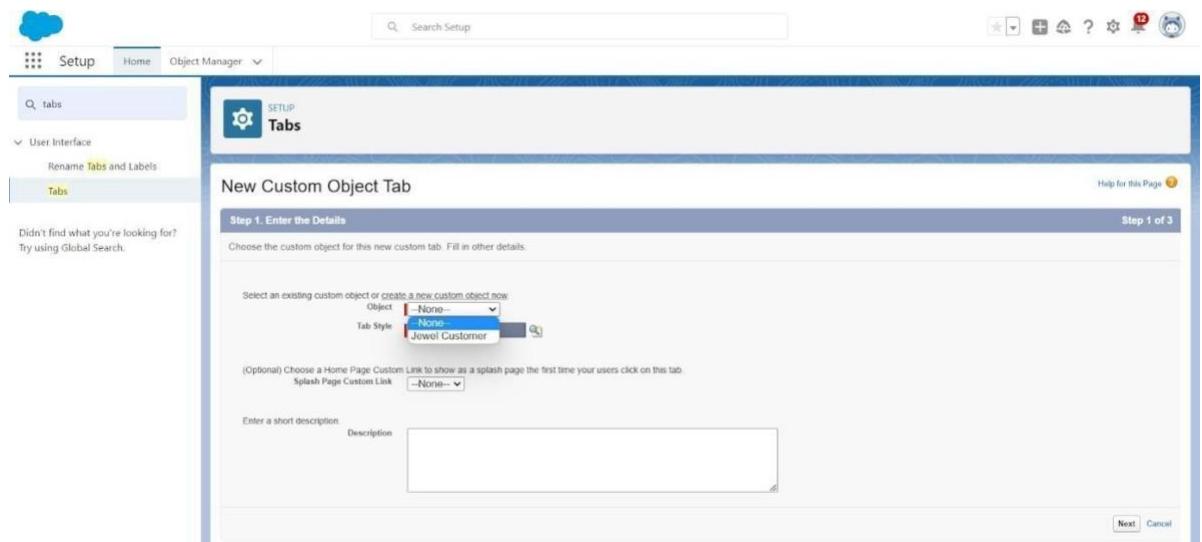
Custom Tabs

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

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external pages. Lightning Component tabs allow you to add Lightning components to the navigation bar. You can also allow users to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs	New	What Is This?
No Custom Object Tabs have been defined		
Web Tabs	New	What Is This?
No Web Tabs have been defined		

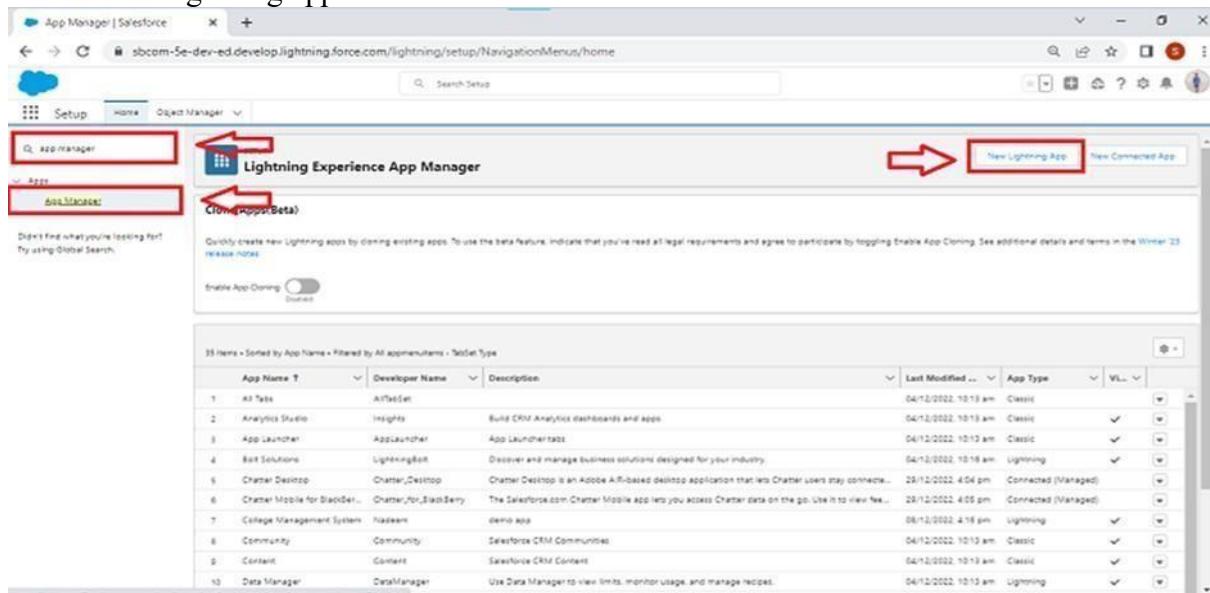
2. Select Object (Jewel Customer) >> Select any tab style >> Next (Add to profile page) keep it as default >> Next (Add to Custom App) keep it as default >> Save.



4. Create Lightning App

To create a lightning app page:

1. Go to setup page >> search "appmanager" in quick find >> select "appmanager" >>
2. Click on New lightning App.



3. Fill the app name in app details and branding as follows:

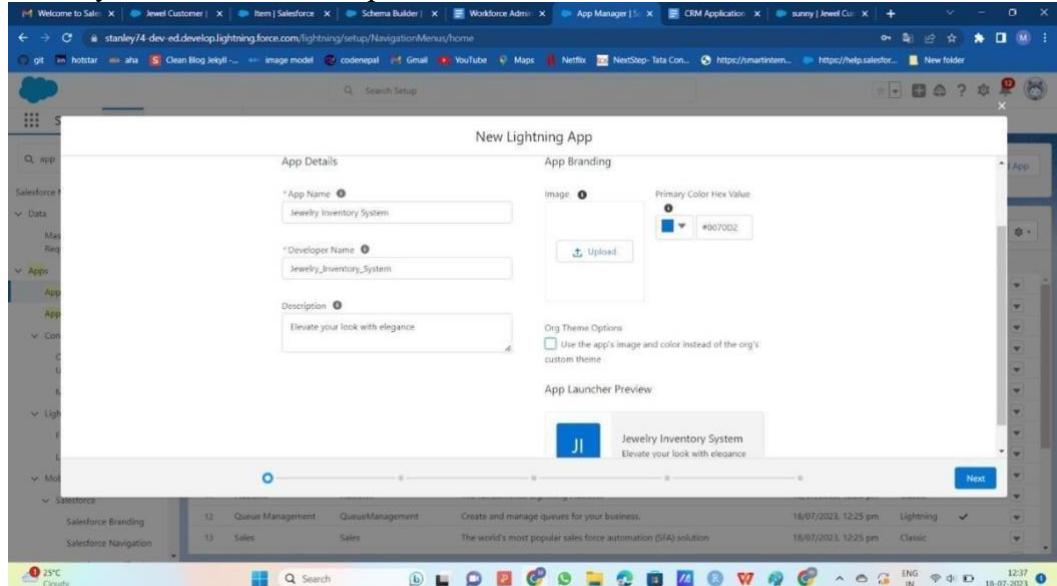
Name : Jewellery Inventory System.

Developer Name : This will auto populated

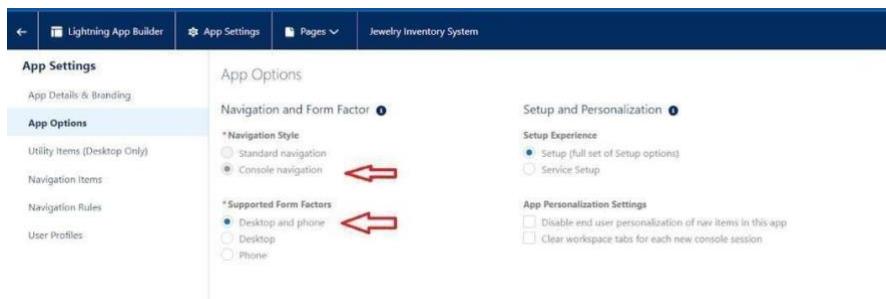
Description: Elevate your look with elegance

Image: optional (if you want to give any image you can otherwise not mandatory)

Primarycolourhexvalue :keepthisdefault.

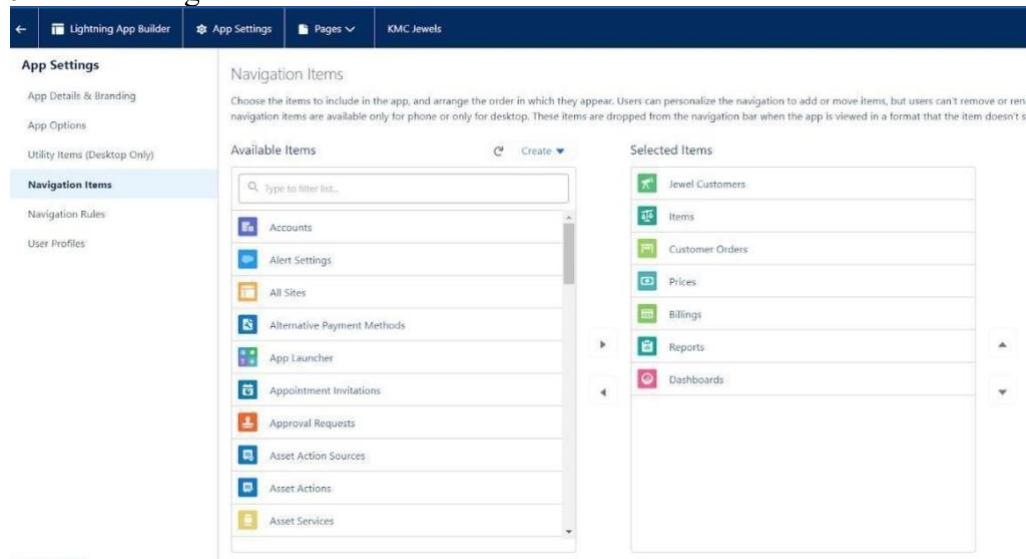


4. Then click Next>>(Appoptionpage)SetNavigationStyleasConsoleNavigation>> Next.



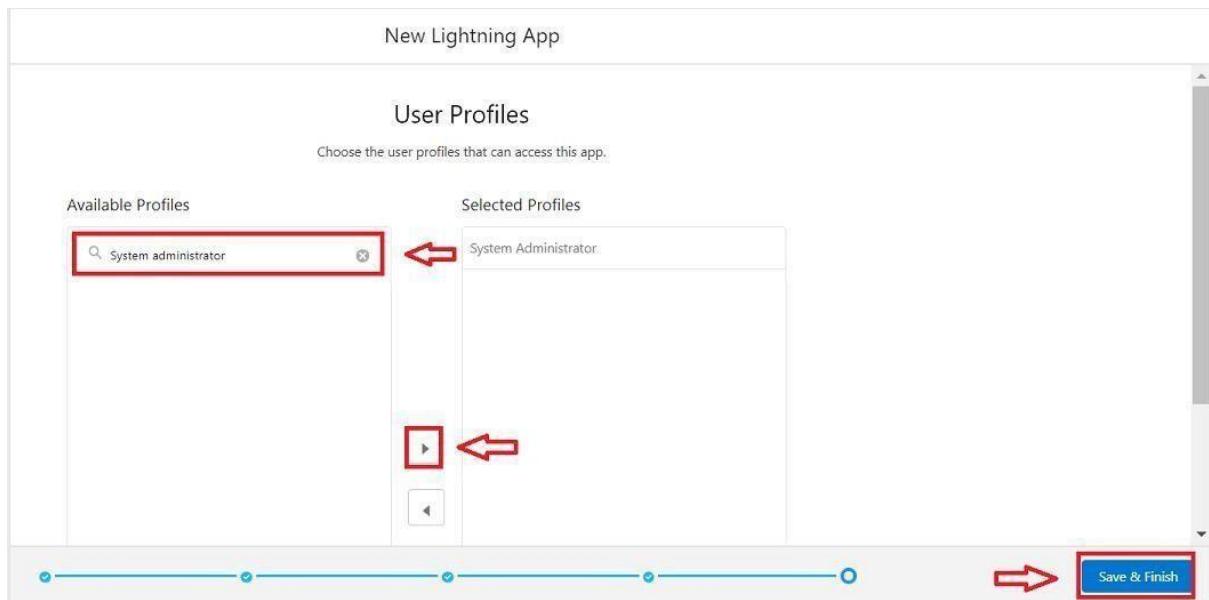
(UtilityItems) keep it as default>>Next.

5. To Add Navigation Items:



Search for the item in the (JewelCustomer, Item, CustomerOrder, Price, Billing, Reports, Dashboard) from the search bar and move it using the arrow button ? Next? Next.

6. ToAddUserProfiles:



Searchprofiles(Systemadministrator)inthesearchbar>>clickonthearrowbutton>> save & finish.

5. CreatingLookupRelationship

ToCreatearelationshipbetweenJewelCustomer&CustomerOrderObjects.

1. Gotothesetuppage>>clickonobjectmanager>>typeobjectname(CustomerOrder) in the quick find bar >> click on the object.
2. Clickonfields&relationship>>clickonNew.
3. Select“Lookuprelationship”asdatatypeandclickNext.
4. Selecttherelatedobject“JewelCustomer”.
5. GiveFieldLabelas“Customer”andclickNext.
6. Next>>Next>>Save.

6. GoldSmithProfile

To create a new profile:

1. Gotosetup>>typeprofilesinquickfindbox>>clickonprofiles?clone the desired profile (System Administrator) >> enter profile name (Gold Smith) >> Save.

Custom Object Permissions						
	Basic Access	Read	Create	Edit	Delete	Data Administration
Assets	<input type="checkbox"/>					
Asset Services	<input type="checkbox"/>					
Billing	<input checked="" type="checkbox"/>					
Book1	<input type="checkbox"/>					
Book2	<input type="checkbox"/>					
Bet Commands	<input type="checkbox"/>					
Brokers	<input type="checkbox"/>					
Buyers	<input type="checkbox"/>					
Candidates	<input type="checkbox"/>					
Customer Orders	<input checked="" type="checkbox"/>					
Items	<input checked="" type="checkbox"/>					
Jewel Customers	<input checked="" type="checkbox"/>					
Job Applications	<input type="checkbox"/>					
Job Postings	<input type="checkbox"/>					
Job Posting Sites	<input type="checkbox"/>					
Positions	<input type="checkbox"/>					
Prices	<input checked="" type="checkbox"/>					
Projects	<input type="checkbox"/>					
ProjectTasks	<input type="checkbox"/>					
Properties	<input type="checkbox"/>					

ScrolldownandClickonSave.

1.WorkerProfile

1. Gotosetup>>typeprofilesinqickfindbox>>clickonprofiles>>clonethedesired profile (Salesforce Platform User) >> enter profile name () >> Save.
2. Whilstillontheprofilepage,thenclick Edit.
3. ScrolldowntoCustomObjectPermissionsandGiveaccesspermissionsforItems,Price and Customer Order objects.
4. ScrolldownandClickonSave.

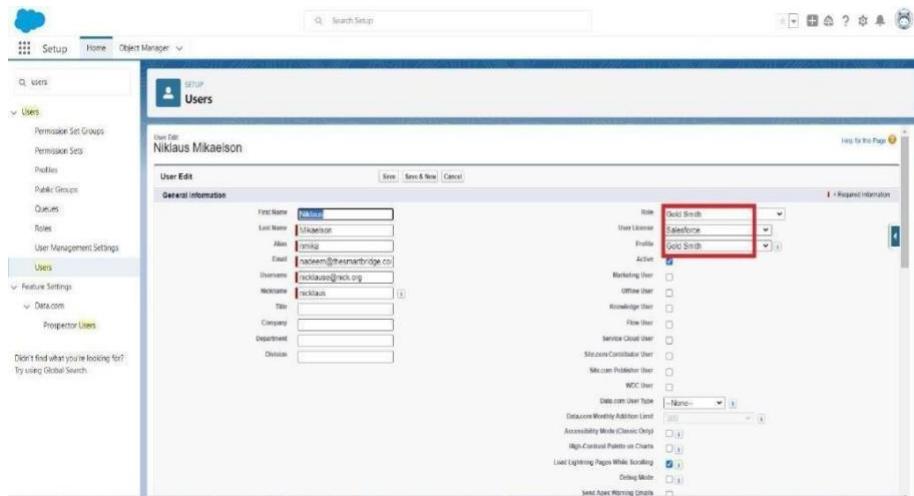
2.CreatingGoldSmithRole

1. Fromsetup,Gotoquickfind>>SearchforRoles>>clickonsetup roles.

2. ClickonExpand Alland clickon addroleunderwhom thisroleworks.
3. GiveLabelas“GoldSmith”andRolenamegetsautopopulated.Checktowhomthis role (Gold Smith) reports. Then click on Save.

CreateUser

1. Gotosetup>>typeusers inquickfindbox>>selectusers>> click Newuser.
2. Fillinthefields
 1. FirstName :Niklaus
 2. LastName :Mikaelson
 3. Alias :GiveaAliasName
 4. Emailid :GiveyourPersonalEmailid
 5. Username :Usernameshouldbeinthisform: text@text.text
 6. NickName :GiveaNickname
 7. Role :Gold Smith
 8. Userlicence :Salesforce
 9. Profiles :Gold Smith



10. Save

CreateUser

1. Gotosetup>>typeusers inquickfindbox>>selectusers>> click Newuser.
2. Fillinthefields
 - FirstName:Kol
 - LastName:Mikaelson
 - Alias:GiveaAliasName
 - Emailid:GiveyourPersonalEmailid
 - Username:Usernameshouldbein thisform:text@text.text
 - NickName:GiveaNickname
 - Role:Worker
 - Userlicence:SalesforcePlatform
 - Profiles:Worker
3. Save.

Note:

Create two more users as mentioned in activity 2 using the same profile.

10. To Create a Gold Page Layout

1. GotoSetup>>ClickonObjectManager>>Searchfortheobject(Item)>>Fromdrop down click on Edit.
2. ClickonPagelayout>>Clickon New.

The screenshot shows the Salesforce Object Manager for the 'Item' object. The 'Page Layouts' tab is selected. A new page layout is being created, with the 'Page Layout Name' set to 'Item Layout'. The 'Created By' and 'Modified By' fields show meghana katoju. The 'Page Layout Assignment' button is highlighted with a red box. The 'Fields' section is expanded, showing various fields like Buttons, Quick Actions, Mobile & Lightning Actions, etc. A specific field, 'Section', is selected and highlighted with a red box. The 'Information' panel on the right displays details for the selected field, including its ID (GEN-2004-001234), Customer Name (Sample Text), Price (Sample Text), Item Type (Sample Text), Ornament (Sample Text), Gold price (₹123.45), Purity Gold price (₹123.45), Weight (0.00252), and Priority (45). The 'Information' panel has a red border around it.

4. ClickSave.
5. Makesureyourpagelayoutlookslikethepictureabove.Likethiscreatesameforsilver page layout.

11. To create a Record Type

1. Gotosetup>>clickonObjectManager>>typeobjectname(Item)inquickfindbar? click on the object.
2. ClickontheRecordTypes>>clickNew.

The screenshot shows the Salesforce Object Manager for the 'Item' object. The 'Record Types' tab is selected. A new record type is being created, with the 'Record Type Label' set to 'Gold' and 'Description' set to 'Gold items information'. The 'Active' and 'Modified By' fields show meghana katoju. The 'Page Layout Assignment' button is visible. The 'Record Types' tab is highlighted with a red box and has a red arrow pointing to it from the left.

3. SelectExistingRecordas“Master”,RecordtypeLabelas“Gold”,Descriptionas “Golditemsinformation”.

4. Uncheck for “Make Available”.

Profile Name	Record Types Currently Available	<input type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Analytics Cloud Integration User		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter External User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter Free User		<input type="checkbox"/>	<input type="checkbox"/>

5. Scroll down and check for the GoldSmith, WorkerJW & SystemAdministrator profile and click on Next.

Record Type	Description	<input type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Customer Portal Manager Standard		<input type="checkbox"/>	<input type="checkbox"/>
External Apps Login User		<input type="checkbox"/>	<input type="checkbox"/>
External Identity User		<input type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	Gold (Default) Silver	<input type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	Gold (Default) Silver	<input type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	Gold (Default) Silver	<input type="checkbox"/>	<input type="checkbox"/>
Gold smith	Gold (Default) Silver	<input checked="" type="checkbox"/>	<input type="checkbox"/>
High Volume Customer Portal User		<input type="checkbox"/>	<input type="checkbox"/>
HR	Gold (Default) Silver	<input type="checkbox"/>	<input type="checkbox"/>
HR Recruiter	Gold (Default) Silver	<input type="checkbox"/>	<input type="checkbox"/>
Identity User	Gold (Default) Silver	<input type="checkbox"/>	<input type="checkbox"/>
J Worker1	Gold (Default) Silver	<input checked="" type="checkbox"/>	<input type="checkbox"/>
J Worker2	Gold (Default) Silver	<input checked="" type="checkbox"/>	<input type="checkbox"/>
J WORKER3	Gold (Default) Silver	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Manager	Gold (Default) Silver	<input type="checkbox"/>	<input type="checkbox"/>
Marketing User	Gold (Default) Silver	<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	Gold (Default) Silver	<input type="checkbox"/>	<input type="checkbox"/>
Partner Admin Subscription User	Gold (Default) Silver	<input type="checkbox"/>	<input type="checkbox"/>

6. Select “Apply a different layout for each profile”, and change page layout to “Page Layout for Gold” for GoldSmith, Worker and System Administrator? save&new.

Activity2: Create another Record Type with name “Silver” following the steps from Activity1.

Note: Use page layout for Silver.

11. Creating permission set

1. Go to setup >> type “permissionsets” in quick search >> select permission sets >> New.
2. Enter the label name as “Per to Worker”, API will be auto populated? save.

Permission Set
Clone: Per to Worker
Enter a new label and description for the cloned permission set.

Enter permission set information

Label	Per to Worker
API Name	Per_to_Worker
Description	(empty)
Session Activation Required	<input type="checkbox"/>
License	(empty)

Save Cancel

3. Under Apps Select object settings.

Permission Sets

Items

Tab Settings

Item: Record Type Assignments

Record Types	Assigned Record Types
QTR	<input checked="" type="checkbox"/>
Silver	<input checked="" type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

1. Click on Save.
2. After saving the permission click on the Manage assignment
3. Now click on the Add Assignment.

PERMISSION SET 'PER TO WORKER' > MANAGE ASSIGNMENT EXPIRATION

Per to Worker

Select Users to Assign

All Users ▾

Full Name ↑	Alias	Username	Role	Action
Chatter Expert	Chatter	chatty.00d5i000003ksyzea4.i4i5wtjeybt4@chatter.salesforce.com	<input checked="" type="checkbox"/>	
Integration User	integ	integration@00d5i000003ksyzea4.com	<input checked="" type="checkbox"/>	
Mani deepak	mdeep	manideepak143@gmail.com	<input checked="" type="checkbox"/>	Worker
Megha Katoju Site Guest User	guest	megha_katoju@00d5i000003ksyzea4.org.force.com	<input checked="" type="checkbox"/>	
Meghana Katoju Site Guest User	guest	meghana_katoj@00d5i000003ksyzea4.org.force.com	<input checked="" type="checkbox"/>	

Cancel

PERMISSION SET 'PER TO WORKER' > MANAGE ASSIGNMENT EXPIRATION

Per to Worker

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Mani deepak	Worker	Worker	<input checked="" type="checkbox"/>	Salesforce Platform	Never Expires

Cancel Back Assign

12. Create a Trigger Handler class

Triggerhandler:

A trigger handler is a design pattern that organises trigger logic into separate classes. This helps in keeping code organised, reusable, and easier to maintain. The trigger handler class contains methods that handle the specific logic for different trigger events, improving code structure and readability. This approach is particularly useful for complex triggers or projects with multiple triggers, as it promotes modular coding practices and reduces the chances of code duplication.

CODE:

```
public class UpdatePaidAmountTriggerHandler {  
    public static void handleBeforeInsert(List<Billingc> newBillings) {  
        for (Billingc billing : newBillings) {  
            billing.Paid_Amountc = billing.Paying_Amountc;  
        }  
    }  
  
    public static void handleBeforeUpdate(Map<Id, Billing_c> oldBillingsMap, List<Billing_c> updatedBillings) {  
        for (Billingcbilling : updatedBillings) {  
            Billing_c oldBilling = oldBillingsMap.get(billing.Id);  
            Decimal oldPaidAmount = oldBilling.Paid_Amount_c;  
            billing.Paid_Amountc = oldPaidAmount + billing.Paying_Amountc;  
        }  
    }  
}
```

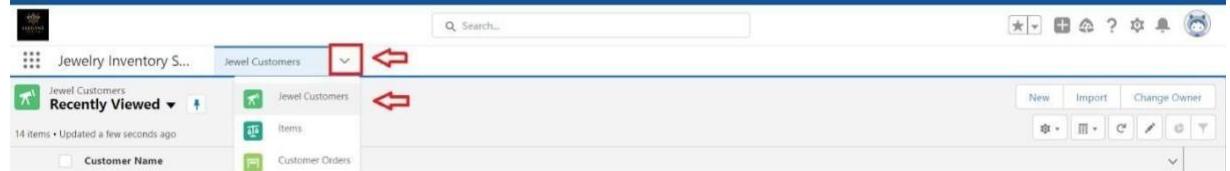
13. Create a Record (JewelCustomer)

1. Click on App Launcher on the left side of the screen.
2. Search Jewelry Inventory System & click on it.



3. Click on Drop Down and Click on the JewelCustomer tab.

4. ClickNew.



5. FilltheDetailsandclick onSave.

14. CreateReport

1. Gototheapp>>clickontheresportstab
2. ClickNewReport.

3. Selectreporttypefromcategoryorfromreporttypepanelorfromsearchpanel? click on start report.

4. Customise your report

The screenshot shows the Microsoft Report Builder interface. On the left, the 'Fields' pane is open, displaying a list of fields under 'Groups' and 'Columns'. The 'Columns' section includes 'Price: Price', '# Gold price', and '# Silver price', with '# Gold price' and '# Silver price' currently selected. The main area shows a preview of the report data, which is a list of 10 items with columns for Price: Price, # Gold price, and # Silver price. A red box highlights the 'Add column...' button in the Fields pane.

- Add fields from the left pane as shown below.

5. Save or run it.

The screenshot shows the Microsoft Report Builder interface after adding fields. The 'Fields' pane now includes 'Add column...', 'Price: Price', '# Gold price', and '# Silver price'. The preview area displays the same 10 items with the added columns. The data includes values like \$60,000.00000 for # Gold price and \$62,350.00000 for # Silver price.

Note: Reports may get varied from the above pictures as the data might be different

15. Create Dashboard

1. Go to the app >> click on the Dashboard tabs.

The screenshot shows the Dynamics 365 dashboard creation interface. The top navigation bar has a 'Dashboards' tab highlighted with a red box. The main area shows a sidebar with 'Dashboards' and 'Recent' sections, and a search bar at the top right labeled 'Search recent dashboards...'. A 'New Dashboard' button is also visible.

2. Give a Name and click on Create.

3. Select add component.

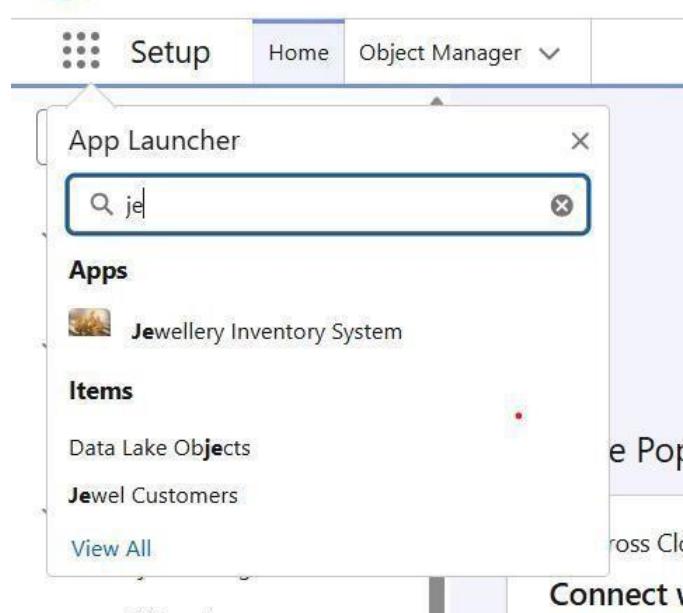
4. Select a Report and click on select.

5. Click Add then click on Save and then click on Done. Activity 2: Create another Dashboard as we discussed in activity 1.

16. Create a Flow

Outputscreenshots

1. Searchforjewelleryinventorysystem:



2. Creatingallcustomerrelatedobjects

A screenshot of the Salesforce Object Manager. The page title is 'Object Manager'. A search bar at the top right contains the text 'customer'. Below the search bar, there is a table listing three objects: 'Customer' (Standard Object), 'Customer Order_c' (Custom Object), and 'Jewel Customer' (Custom Object). The table includes columns for 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. The 'Customer Order_c' and 'Jewel Customer' rows have their last modified date listed as '10/28/2025' and '10/27/2025' respectively, and both have a checkmark in the 'DEPLOYED' column.

3. Creatingcustomerrelatedobjectfields

A screenshot of the Salesforce Object Manager for the 'Jewel Customer' object. The page title is 'Jewel Customer'. On the left, there is a sidebar with various tabs like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The 'Fields & Relationships' tab is selected. The main content area shows a table titled 'Fields & Relationships' with 11 items. The table includes columns for 'Field Label', 'API Name', and 'Type'. Some examples of fields listed include 'Created By', 'Customer name', 'Email', 'Last Modified By', 'Owner', 'Phone', 'State', 'Street', and 'Zip/Postal code'. Each field entry has a dropdown arrow icon to its right, likely for editing or deleting the field.

4. Created sample records for Customers, item, prices, Billings

Jewellery Inventory System Customer Orders

Customer Orders

Recently Viewed ▾

15 items • Updated a few seconds ago

	<input type="checkbox"/> Customer Order Id
1	<input type="checkbox"/> Customer Order-15
2	<input type="checkbox"/> Customer Order-14
3	<input type="checkbox"/> Customer Order-13
4	<input type="checkbox"/> Customer Order-12
5	<input type="checkbox"/> Customer Order-11
6	<input type="checkbox"/> Customer Order-10
7	<input type="checkbox"/> Customer Order-09
8	<input type="checkbox"/> Customer Order-08
9	<input type="checkbox"/> Customer Order-07
10	<input type="checkbox"/> Customer Order-06
11	<input type="checkbox"/> Customer Order-05

Jewellery Inventory System Prices

Prices

Recently Viewed ▾

14 items • Updated a few seconds ago

	<input type="checkbox"/> Price Id
1	<input type="checkbox"/> Price-14
2	<input type="checkbox"/> Price-13
3	<input type="checkbox"/> Price-12
4	<input type="checkbox"/> Price-11
5	<input type="checkbox"/> Price-10
6	<input type="checkbox"/> Price-09
7	<input type="checkbox"/> Price-08
8	<input type="checkbox"/> Price-07
9	<input type="checkbox"/> Price-06
10	<input type="checkbox"/> Price-05
11	<input type="checkbox"/> Price-04

Jewellery Inventory System Items

Items

Recently Viewed ▾

14 items • Updated a few seconds ago

	<input type="checkbox"/> Item Id
1	<input type="checkbox"/> Item-14
2	<input type="checkbox"/> Item-07
3	<input type="checkbox"/> Item-13
4	<input type="checkbox"/> Item-12
5	<input type="checkbox"/> Item-11
6	<input type="checkbox"/> Item-10
7	<input type="checkbox"/> Item-09
8	<input type="checkbox"/> Item-08
9	<input type="checkbox"/> Item-06
10	<input type="checkbox"/> Item-05
11	<input type="checkbox"/> Item-04

Jewellery Inventory System Billings

Billings

Recently Viewed ▾

14 items • Updated a few seconds ago

	<input type="checkbox"/> Billing Id
1	<input type="checkbox"/> Billing-14
2	<input type="checkbox"/> Billing-13
3	<input type="checkbox"/> Billing-12
4	<input type="checkbox"/> Billing-11
5	<input type="checkbox"/> Billing-10
6	<input type="checkbox"/> Billing-09
7	<input type="checkbox"/> Billing-08
8	<input type="checkbox"/> Billing-07
9	<input type="checkbox"/> Billing-06
10	<input type="checkbox"/> Billing-05
11	<input type="checkbox"/> Billing-04

Jewellery Inventory System

Jewel Customers

Recently Viewed

13 items • Updated a few seconds ago

	Customer name
1	Abi
2	Reena
3	Sneha
4	Rahan
5	Bavya
6	Karthi
7	Kavya
8	Rahul Mehta
9	Priya Sharma
10	Riya Jewels
11	Priya

5. Create the report for the records

Jewellery Inventory System

Reports

Recent

5 items

REPORTS	Report Name	Description	Folder	Created By	Created On	Si
Recent	Prices Report		Private Reports	Muthamil Selvi P	10/29/2025, 1:15 PM	
Created by Me	Prices Report		Private Reports	Muthamil Selvi P	10/28/2025, 7:48 AM	
Private Reports	Billings with item and customer order		Private Reports	Muthamil Selvi P	10/28/2025, 7:33 PM	
Public Reports	Item with Billings Report		Private Reports	Muthamil Selvi P	10/29/2025, 1:12 PM	

6. Dashboard View of reports

Jewellery Inventory System

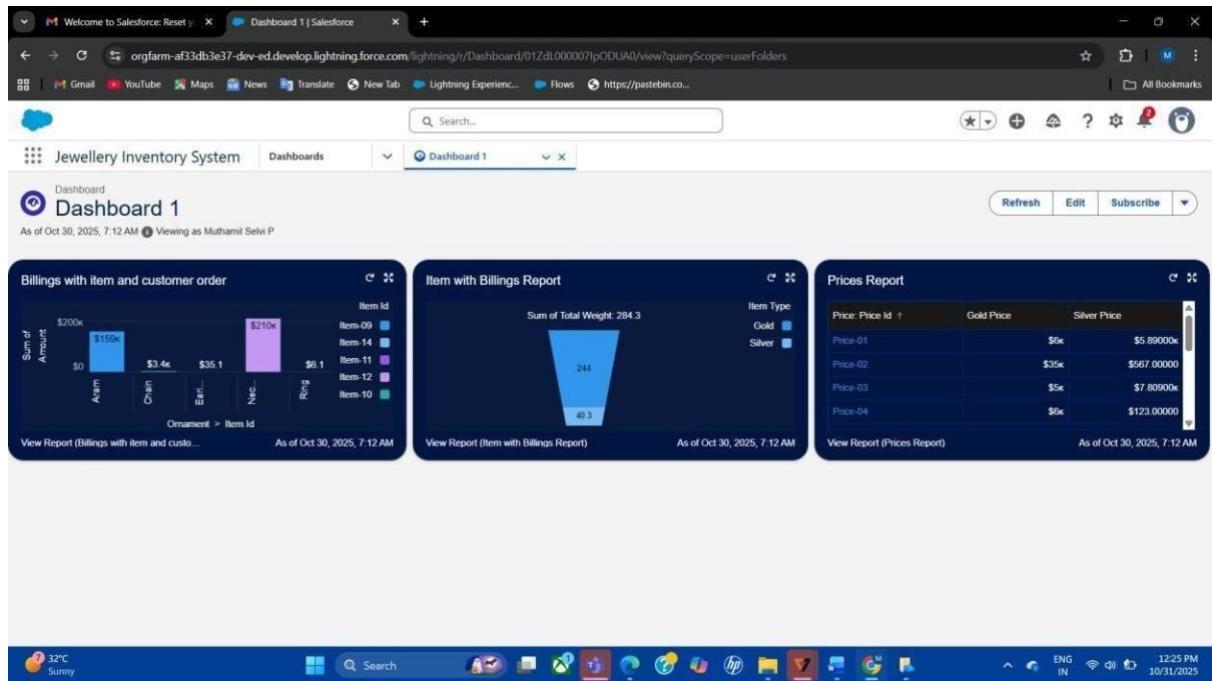
Dashboards

Recent

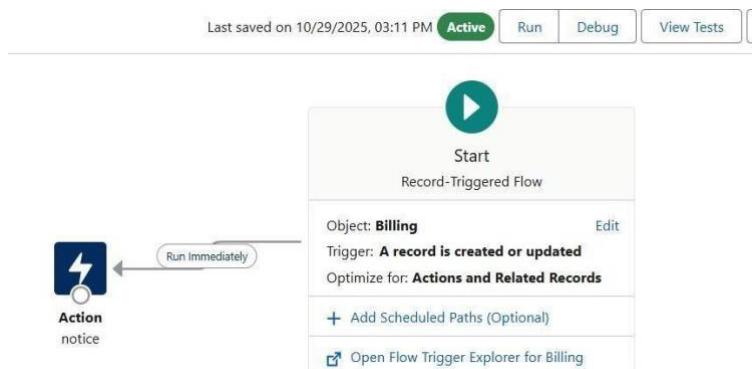
2 items

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On
Recent	Dashboard 1		Private Dashboards	Muthamil Selvi P	10/28/2025, 10:34 AM
Created by Me	Dashboard 2		Private Dashboards	Muthamil Selvi P	10/28/2025, 7:36 PM
Private Dashboards					

7. Reportviewindashboard



8. WorkfloworFlowSetupPage



9. ProjectCompletion

Nm id:458DEE7CE334D2E8B5C47B2E0ABC93AC

Project title :CRM application for jewel management
No mentor has assigned

Demonstration video link
https://drive.google.com/drive/folders/1-_gL8-QlTYb90Can7T0gIgemZJez7Q0V
Project 100 percent completed

Conclusion:

The CRM Application for Jewel Management effectively transforms the traditional jewelry business workflow into a fully digital and automated system using Salesforce. It streamlines key operations such as customer relationship management, product tracking, and order processing with improved accuracy and speed. This project showcases how a customized Salesforce CRM can be tailored to meet the specific needs of the jewelry industry, enhancing productivity, data management, and customer satisfaction.

By reducing manual efforts and enabling real-time analytics, the system empowers jewelers to make smarter, data-driven business decisions and ensures a seamless experience for both customers and administrators.