

CRM APPLICATION FOR JEWEL MANAGEMENT - (DEVELOPER)

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1.INTRODUCTION

1.1 Project Overview

The **Jewel Inventory System** is a comprehensive software solution developed to streamline and manage the inventory and sales operations of jewellery stores and manufacturers. This system is designed to provide an efficient and user-friendly platform for tracking jewellery items, maintaining accurate inventory records, and supporting seamless sales transactions. By automating key processes, the Jewel Inventory System enhances operational efficiency, reduces manual errors, and ensures better control over stock and customer management.

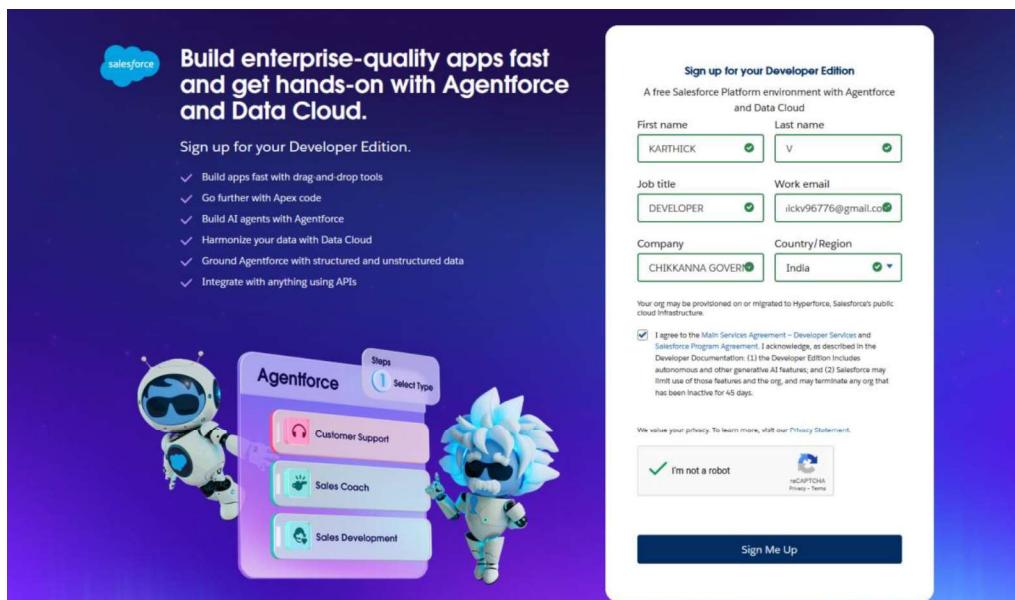
1.2 Purpose

The purpose of the **Jewel Inventory System** is to develop a computerized solution that simplifies the management of jewellery inventory and sales activities. The system is intended to replace traditional manual methods with an efficient and user-friendly application that ensures accurate record keeping, easy tracking of jewellery items, and smooth handling of sales transactions. By providing better control over stock and reducing human errors, the project aims to improve operational efficiency and support effective decision-making for jewellery businesses.

DEVELOPMENT PHASE

Creating Developer Account :

By using this URL - <https://www.salesforce.com/form/developer-signup/?d=pb>



Account Activation Object:

- Open your email inbox and click on the **Reset Password** link (wait 5–10 minutes if needed).
- Enter a new password, answer the security question, and click **Change Password**.
- You will be redirected to your **Salesforce setup page**.

OBJECT:

- **Created objects:** Jewel Customer, Item, Customer Order, Price, Billing.

Jewel Customer Object :

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The left sidebar lists various configuration options: 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, and Scoping Rules. The main panel displays the 'Details' for the 'Jewel Customer' object. The 'Description' field is empty. The 'API Name' is set to 'Jewel_Customer__c'. Under the 'Custom' section, 'Singular Label' is 'Jewel Customer' and 'Plural Label' is 'Jewel Customers'. On the right, there are checkboxes for 'Enable Reports' (checked), 'Track Activities', and 'Track Field History'. Deployment status is 'Deployed' with help settings pointing to 'Standard salesforce.com Help Window'. Top navigation includes a search bar, setup icons, and a toolbar with edit and delete buttons.

Item Object :

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The left sidebar lists various configuration options: 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, and Scoping Rules. The main panel displays the 'Details' for the 'Item' object. The 'Description' field is empty. The 'API Name' is set to 'Item__c'. Under the 'Custom' section, 'Singular Label' is 'Item' and 'Plural Label' is 'Items'. On the right, there are checkboxes for 'Enable Reports' (checked), 'Track Activities', and 'Track Field History'. Deployment status is 'Deployed' with help settings pointing to 'Standard salesforce.com Help Window'. Top navigation includes a search bar, setup icons, and a toolbar with edit and delete buttons.

Customer Order Object :

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The main title is 'Customer Order'. On the left, a sidebar lists various configuration options: 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, and Scoping Rules. The right panel displays the 'Details' section for the Customer Order object. It includes fields for Description, API Name (Customer_Order__c), Custom status (✓), Singular Label (Customer Order), Plural Label (Customer Orders), and several checkboxes for Reports, Activities, and History. Deployment status is listed as 'Deployed'.

Price Object :

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The main title is 'Price'. The left sidebar contains the same list of configuration options as the previous screenshot. The right panel displays the 'Details' section for the Price object. It includes fields for Description, API Name (Price__c), Custom status (✓), Singular Label (Price), Plural Label (Prices), and several checkboxes for Reports, Activities, and History. Deployment status is listed as 'Deployed'.

Billing Object :

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. On the left, a sidebar lists various configuration options like Fields & Relationships, Page Layouts, and Record Types. The main area displays the 'Details' for the 'Billing' object. The API Name is set to 'Billing_c'. Other details include Singular Label ('Billing'), Plural Label ('Billings'), and Deployment Status ('Deployed'). Buttons for 'Edit' and 'Delete' are located at the top right of the details panel.

TABS :

- *A **Tab** in Salesforce is a user interface used to create and view records of objects.
- *Tabs can be of different types such as **Custom, Web, Visualforce, Lightning Component**.
- *They help businesses access stored data easily, improve navigation, and enhance productivity.

Created a Custom Tab :

create a **Customer Tab**, go to **Setup → Tabs → New (Custom Object Tab)**.
Select the object **Jewel Customer**, choose a tab style, and proceed with default profile and app settings.
Click **Save** to complete the tab creation.

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. A message at the top says 'You can create new custom tabs to extend Salesforce functionality or to build new application functionality.' Below it, a table lists 'Custom Object Tabs' with columns for Action, Label, Tab Style, and Description. One row is highlighted with a yellow background. At the bottom, there's a section for 'Web Tabs'.

Action	Label	Tab Style	Description
Edit Del	Billings	Credit card	
Edit Del	Customer_Orders	Factory	
Edit Del	Items	Pencil	
Edit Del	Jewel_Customers	Trophy	
Edit Del	Prices	Bank	

THE LIGHTNING APP :

*A **Lightning App** is a collection of objects, tabs, and tools grouped together in Salesforce for a specific purpose.

*It allows customization with logos, colors, utility bars, and Lightning page tabs.

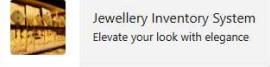
*Users can easily switch between apps, improving navigation and efficiency.

Created a Lightning App :

New Lightning App

App Details & Branding

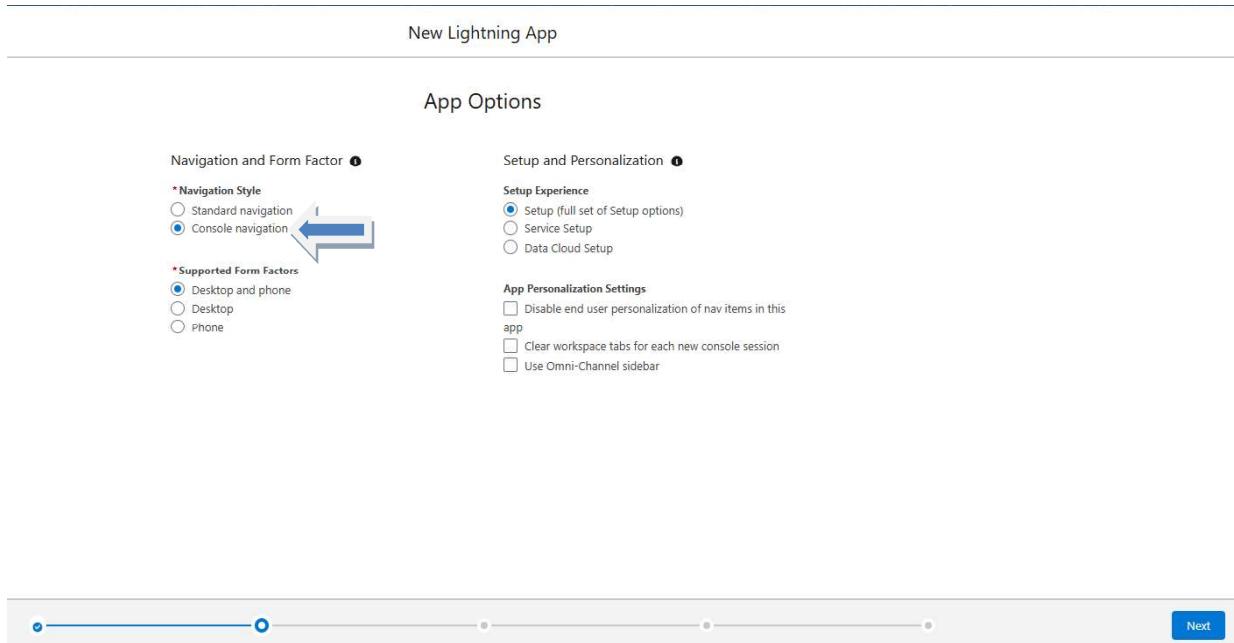
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details	App Branding
* App Name <small>i</small> Jewellery Inventory System	Image <small>i</small>  Primary Color Hex Value <small>i</small> #0070D2
* Developer Name <small>i</small> Jewellery_Inventory_System	
Description <small>i</small> Elevate your look with elegance	Org Theme Options <input type="checkbox"/> Use the app's image and color instead of the org's custom theme
App Launcher Preview	
	

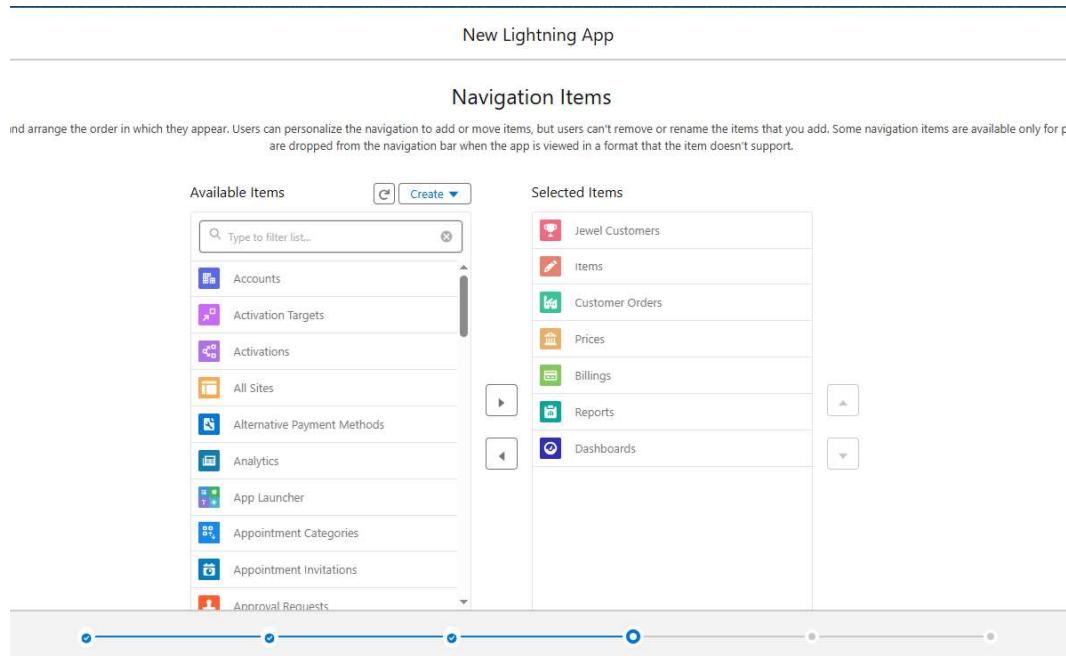
Next

To create a **Lightning App**, go to **Setup → App Manager → New Lightning App**.

Enter the app name, select a logo/color



This screen shows the **App Options** in Salesforce Lightning App setup, where you choose navigation style, supported devices, and personalization settings.



This screen shows the **Navigation Items setup** in Salesforce Lightning App, where you select and arrange objects (like Jewel Customers, Items, Orders, Reports, Dashboards) to be included in the app.

FIELDS :

- *In Salesforce, **Fields** represent the data stored in object records, similar to columns in a database.
- *They are of two types: **Standard Fields** (predefined like Created By, Owner, Last Modified) and **Custom Fields** (user-defined based on requirements).
- *Fields make it easy to store, search, edit, and manage specific information for each object.

Configured Fields And Relationships:

Customer Order Fields And Relationships:

The screenshot shows the Salesforce Object Manager for the 'Customer Order' object. The left sidebar lists various configuration options like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays the 'Fields & Relationships' section with 8 items. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Jewel Customer)		
Customer Order Id	Name	Auto Number		
Item	Item__c	Master-Detail(Item)		
Last Modified By	LastModifiedById	Lookup(User)		
Order Status	Order_Status__c	Picklist		

Jewel Customer Fields And Relationships:

The screenshot shows the Salesforce Object Manager for the 'Jewel Customer' object. The left sidebar lists various configuration options. The main area displays the 'Fields & Relationships' section with 11 items. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes:

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)		
Zip/Postal code	Zip_Postal_code__c	Text(6)		

Items Fields And Relationships:

The screenshot shows the Salesforce Setup interface with the following details:

- Setup > Object Manager**
- Item** object selected.
- Fields & Relationships** tab selected.
- Fields & Relationships** section: 23 items, Sorted by Field Label.
- Table Headers:** FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, INDEXED.
- Table Data:**

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)		
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)		
Making Charges	Making_Charges_c	Formula (Currency)		
Ornament	Ornament_c	Text(20)		
Owner	OwnerId	Lookup(User,Group)		

The screenshot shows the Salesforce Setup interface with the following details:

- Setup > Object Manager**
- Item** object selected.
- Fields & Relationships** tab selected.
- Fields & Relationships** section: 23 items, Sorted by Field Label.
- Table Headers:** FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, INDEXED.
- Table Data:**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Ornament	Ornament_c	Text(40)		
Owner	OwnerId	Lookup(User,Group)		
Percentage	Percentage_c	Number(2, 0)		
Prices	Prices_c	Lookup(Price)		
Priority	Priority_c	Picklist		
Purity	Purity_c	Number(2, 0)		
Purity Gold Price	Purity_Gold_Price_c	Formula (Currency)		
Re�nrt Type	Re�nrtTypeid	Re�nrt Type		
Silver Price	Silver_Price_c	Formula (Number)		
Stone Weight	Stone_Weight_c	Number(5, 5)		
Stone/Other Price	Stone_Other_Price_c	Currency(8, 2)		
Total Weight	Total_Weight_c	Formula (Number)		
Weight	Weight_c	Number(8, 5)		

Price Fields And Relationships:

The screenshot shows the Salesforce Object Manager for the 'Price' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area is titled 'Fields & Relationships' and shows six items sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Gold Price	Gold_Price__c	Currency(8, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Price Id	Name	Auto Number	✓	
Silver Price	Silver_Price__c	Currency(8, 5)		

Billing Fields And Relationships:

The screenshot shows the Salesforce Object Manager for the 'Billing' object. The left sidebar lists various setup options. The main area is titled 'Fields & Relationships' and shows 16 items sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Billing Id	Name	Auto Number	✓	
Created By	CreatedById	Lookup(User)		
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)		
Owner	OwnerId	Lookup(User,Group)	✓	

Billing

Fields & Relationships		
16 Items, Sorted by Field Label		
Item Charge	Item_Charge__c	Formula (Currency)
Last Modified By	LastModifiedById	Lookup(User)
Making Charges	Making_Charges__c	Formula (Currency)
Ornament	Ornament__c	Formula (Text)
Owner	OwnerId	Lookup(User,Group)
Paid Amount	Paid_Amount__c	Currency(18, 0)
Paying Amount	Paying_Amount__c	Currency(18, 0)
Stone weight	Stone_weight__c	Formula (Number)
Stones/other price	Stones_other_price__c	Formula (Currency)
Total Amount	Total_Amount__c	Formula (Currency)
Weight	Weight__c	Formula (Number)

Created The Field Dependencies:

Item

Field information

Field Label	Priority	Object Name	Item
Field Name	Priority	Data Type	Picklist
API Name	Priority__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	meghana.katoju. 7/1/2023, 10:55 PM	Modified By	meghana.katoju. 7/1/2023, 10:55 PM

General Options

Required	<input type="checkbox"/>
Default Value	<input type="text"/>

Picklist Options

Restrict picklist to the values defined in the value set	<input checked="" type="checkbox"/>
Controlling Field	[New]

Picklist Values Used

Active and Inactive picklist values	4 (1,000 max)
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Field Dependencies

Go to Setup → Object Manager → Item → Fields & Relationships and open the Priority field.

New Field Dependency

Help for this Page 

Create a dependent relationship that causes the values in a picklist or multi-select picklist to be dynamically filtered based on the value selected by the user in another field.
• The field that drives filtering is called the "controlling field." Standard and custom checkboxes and picklists with at least one and less than 300 values can be controlling fields.

• The field that has its values filtered is called the "dependent field." Custom picklists and multi-select picklists can be dependent fields.

Step 1. Select a controlling field and a dependent field. Click Continue when finished.

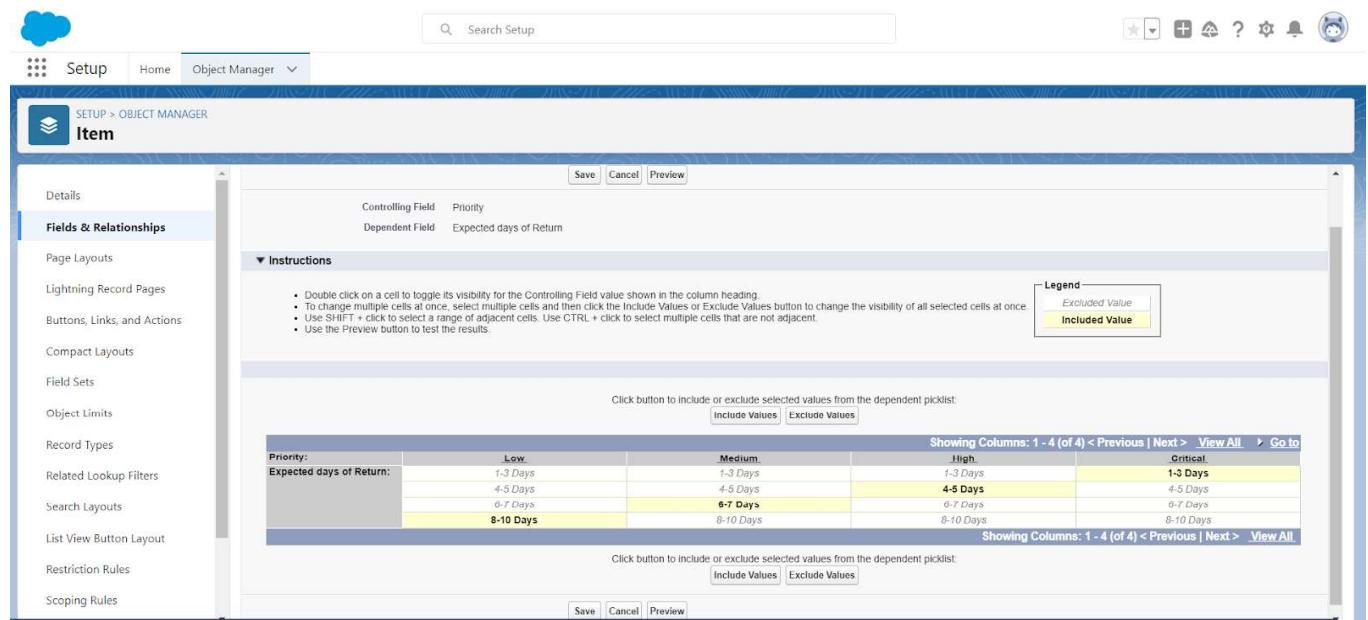
Step 2. On the following page, edit the filter rules that control the values that appear in the dependent field for each value in the controlling field.



Controlling Field: --None--
Dependent Field: --None--

Continue Cancel

Create a new Field Dependency, selecting Priority as the controlling field and Expected Days of Return as the dependent field.



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

Controlling Field: Priority
Dependent Field: Expected days of Return

Instructions

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Legend

Excluded Value
Included Value

Click button to include or exclude selected values from the dependent picklist:

Priority:	Low	Medium	High	Critical
Expected days of Return:	1-3 Days	1-3 Days	1-3 Days	1-3 Days
	4-5 Days	4-5 Days	4-5 Days	4-5 Days
	6-7 Days	6-7 Days	6-7 Days	6-7 Days
	8-10 Days	8-10 Days	8-10 Days	8-10 Days

Showing Columns: 1 - 4 (of 4) < Previous | Next > [View All](#) [Go to](#)

Click button to include or exclude selected values from the dependent picklist:

Priority:	Low	Medium	High	Critical
Expected days of Return:	1-3 Days	1-3 Days	1-3 Days	1-3 Days
	4-5 Days	4-5 Days	4-5 Days	4-5 Days
	6-7 Days	6-7 Days	6-7 Days	6-7 Days
	8-10 Days	8-10 Days	8-10 Days	8-10 Days

Showing Columns: 1 - 4 (of 4) < Previous | Next > [View All](#)

Map the related values, click Include Values, and Save to complete

Created the validation rule :

SETUP > OBJECT MANAGER
Jewel Customer

Details	Jewel Customer Validation Rule Back to Jewel Customer
Fields & Relationships	
Page Layouts	Validation Rule Detail Rule Name: Postal_Code Error Condition Formula: AND(OR(LEN(Zip_Postal_code_c) <> 6, NOT(REGEX(Zip_Postal_code_c, "[0-9]{6}\$"))), NOT(ISBLANK(Zip_Postal_code_c))) Error Message: Must contain 6 digits Description: Created By: <u>KARTHICK_V</u> 8/25/2025, 11:23 PM Modified By: <u>KARTHICK_V</u> 8/25/2025, 11:23 PM
Lightning Record Pages	
Buttons, Links, and Actions	
Compact Layouts	
Field Sets	
Object Limits	
Record Types	
Related Lookup Filters	
Search Layouts	

SETUP > OBJECT MANAGER
Jewel Customer

Details	Jewel Customer Validation Rule Back to Jewel Customer
Fields & Relationships	
Page Layouts	Validation Rule Detail Rule Name: ValidationRule_For_JewelCustomerObject Error Condition Formula: OR(ISBLANK(City_c), ISBLANK(Country_c), ISBLANK(Phone_c), ISBLANK(State_c), ISBLANK(Street_c)) Error Message: Please fill Required fields Description: Created By: <u>KARTHICK_V</u> 8/25/2025, 11:24 PM Modified By: <u>KARTHICK_V</u> 8/25/2025, 11:24 PM
Lightning Record Pages	
Buttons, Links, and Actions	
Compact Layouts	
Field Sets	
Object Limits	

PROFILES :

- *A Profile in Salesforce is a collection of settings and permissions that define user access to objects, fields, tabs, apps, and other features.
- * There are Standard Profiles (predefined, non-deletable) and Custom Profiles (user-defined, deletable if unused).

Gold Smith Profile Created:

The screenshot shows the Salesforce Setup interface. The left sidebar is collapsed, and the main area is titled 'Profiles'. A sub-section titled 'Clone Profile' is displayed, prompting the user to 'Enter the name of the new profile.' Below this, a message says 'You must select an existing profile to clone from.' A dropdown menu labeled 'Existing Profile' is set to 'System Administrator'. The 'Profile Name' field contains 'Gold Smith'. At the bottom right are 'Save' and 'Cancel' buttons.

Worker Profile Created:

The screenshot shows the Salesforce Setup interface. The left sidebar is collapsed, and the main area is titled 'Profiles'. A sub-section titled 'Worker Profile' is displayed, showing a list of permissions and page layouts. Below this, the 'Profile Detail' section shows the profile's name as 'Worker Profile', user license as 'Salesforce Platform', and a note that it is a 'Custom Profile'. The 'Created By' field shows 'KARTHIK_V' and the date '8/25/2025, 11:35 PM'. The 'Modified By' field shows 'KARTHIK_V' and the date '8/27/2025, 10:38 PM'. At the bottom, there are links for 'Page Layouts' and 'Standard Object Layouts'.

ROLES:

- * A **Role** in Salesforce defines record-level visibility and determines what data a user can see within the organization.
- * It helps differentiate users based on their **position** in the hierarchy, ensuring proper data access.

Created Gold Smith Role:

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with navigation links like 'Users', 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The 'Roles' link is highlighted. The main area is titled 'Role Edit' and shows a role named 'Gold Smith'. The 'Label' field contains 'Gold Smith', the 'Role Name' field contains 'Gold_Smith', and the 'This role reports to' dropdown is set to 'CEO'. Below these fields, there's a note 'Role Name as displayed on reports' followed by another 'Gold Smith' entry. At the bottom of the form are 'Save', 'Save & New', and 'Cancel' buttons. The top right corner has a 'Help for this Page' link.

Created One More Role As Worker Which Reports To Gold Smith :

The screenshot shows the 'Your Organization's Role Hierarchy' page. It displays a tree structure of roles under 'Meghana'. The 'Meghana' node has an 'Add Role' option. Under it are 'CEO', 'CFO', 'COO', 'Gold Smith', 'Worker', 'HR', 'Manager', 'SVP, Customer Service & Support', and 'SVP, Human Resources'. Each node has 'Edit | Del | Assign' options. A 'Show in tree view' button is located at the top right. The 'Help for this Page' link is also visible.

USERS:

A Salesforce user is anyone who logs in with a unique user account. Each account includes details like username, email, license, profile, and optionally a role. The user's account settings control access to features and records.

Created User:(Gold Smith)

The screenshot shows the 'User Detail' page for a user named 'Niklaus Mikaelson'. The 'Role' is set to 'Gold Smith'. Under 'User License Profile', 'Salesforce Gold Smith' is selected. The 'Active' checkbox is checked. In the 'Marketing User' section, 'Flow User' is checked. Under 'Site.com Publisher User', 'WDC User' is checked. The 'Mobile Push Registrations' dropdown is set to 'User'. The 'Data.com User Type' dropdown is set to 'User'. The 'Accessibility Mode (Classic Only)' dropdown is set to 'User'. The 'Debug Mode' checkbox is checked. The 'High-Contrast Palette on Charts' checkbox is checked. The 'Load Lightning Pages While Scrolling' checkbox is checked. The 'Send Apex Warning Emails' checkbox is checked. The 'Salesforce CRM Content User' checkbox is checked. The 'Receive Salesforce CRM Content Email Alerts' checkbox is checked. The 'Receive Salesforce CRM Content Alerts as Daily Digest' checkbox is checked. The 'Make Setup My Default Landing Page' checkbox is checked. The 'Quick Access Menu' checkbox is checked. The 'Development Mode' checkbox is checked. The 'Show View State in Development Mode' checkbox is checked. The 'Cache Diagnostics' checkbox is checked.

Created User:(Worker)

The screenshot shows the 'User Detail' page for a user named 'Kol Mikaelson'. The 'Role' is set to 'Worker'. Under 'User License Profile', 'Salesforce Platform Worker Profile' is selected. The 'Active' checkbox is checked. In the 'Marketing User' section, 'Flow User' is checked. Under 'Site.com Publisher User', 'WDC User' is checked. The 'Mobile Push Registrations' dropdown is set to 'User'. The 'Data.com User Type' dropdown is set to 'User'. The 'Accessibility Mode (Classic Only)' dropdown is set to 'User'. The 'Debug Mode' checkbox is checked. The 'High-Contrast Palette on Charts' checkbox is checked. The 'Load Lightning Pages While Scrolling' checkbox is checked. The 'Salesforce CRM Content User' checkbox is checked. The 'Receive Salesforce CRM Content Email Alerts' checkbox is checked. The 'Receive Salesforce CRM Content Alerts as Daily Digest' checkbox is checked. The 'Make Setup My Default Landing Page' checkbox is checked. The 'Allow Forecasting' checkbox is checked. The 'No MRU Updates' checkbox is checked. The 'Call Center' checkbox is checked. The 'Phone' checkbox is checked. The 'Extension' dropdown is set to 'Exx'.

PAGE LAYOUTS:

- *Page Layouts in Salesforce let you customize the design of record detail and edit pages.
- *They control the placement of fields, related lists, and custom links for both standard and custom objects.
- *Use case: To make clumsy pages more organized and visually pleasant by grouping related information into sections.

Created a Gold Page layout:

The screenshot shows the 'Page Layout for Gold' configuration screen. On the left, a sidebar lists various layout categories: Details, Fields & Relationships, Page Layouts (which is selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, and Object Limits. The main area displays a grid of fields and sections. A 'Section' component is at the top, followed by a 'Blank Space' component. Below these are fields for Customer Name, Item Type, Ornament, Priority, Silver Price, and Weight. Another section follows, containing fields for Expected Days Of..., KDM, Owner, Purity, and Stone/Other Price. The bottom section contains fields for Amount, Gold Price, Last Modified By, Percentage, Purity Gold Price, and Stone Weight. The right side of the grid includes columns for Label, Type, and Record Type. A 'Record Type' field is highlighted in blue. At the bottom of the page layout editor, there's an 'Item Sample' section and a 'Highlights Panel' with a note to 'Customize the highlights panel for this page layout...'.

Created a Silver Page layout:

This screenshot shows the 'Page Layout for Silver' configuration screen. The sidebar and overall layout are identical to the Gold layout. The main difference is in the field grid. In the 'Silver' layout, the 'Label: Item Type' field under the second section is highlighted with a yellow background. The rest of the layout structure and components are the same as the Gold layout.

This screenshot shows the 'Page Layouts' list view for the 'Item' object. The sidebar on the left includes the 'Page Layouts' category, which is selected. The main area displays a table of page layouts. The columns are labeled 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. There are three items listed:

- Item Layout: Created by KARTHICK V on 8/25/2025, 4:20 AM; Modified by KARTHICK V on 8/25/2025, 10:52 PM
- Page Layout for Gold: Created by KARTHICK V on 8/25/2025, 11:52 PM; Modified by KARTHICK V on 8/25/2025, 11:58 PM
- Page Layout for Silver: Created by KARTHICK V on 8/26/2025, 12:00 AM; Modified by KARTHICK V on 8/26/2025, 12:02 AM

A 'Quick Find' search bar is located at the top right of the list view.

RECORD TYPES :

*Record Types in Salesforce group records of the same object to offer different page layouts, fields, and picklist values.

*They help tailor user experience based on different business processes within the same object.

*Use case: Create separate forms for Gold and Silver records to simplify data entry based on work mode.

created a Record Type : (Gold)

The screenshot shows the Salesforce setup interface for creating a record type. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The 'Record Types' option is selected. The main panel is titled 'Item' and shows a 'Gold' record type. It includes fields for Record Type Label (Gold), Record Type Name (Gold), Namespace Prefix, Description (Gold items information), Created By (KARTHIK.V), and Modified By (KARTHIK.V). The status is Active. Below this, a section titled 'Picklists Available for Editing' lists three fields: Expected Days Of Return, Item Type, and Priority, each with its creation and modification date.

created a Record Type : (Silver)

The screenshot shows the Salesforce setup interface for creating a record type. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The 'Record Types' option is selected. The main panel is titled 'Item' and shows a 'Silver' record type. It includes fields for Record Type Label (Silver), Record Type Name (Silver), Namespace Prefix, Description (Silver items information), Created By (KARTHIK.V), and Modified By (KARTHIK.V). The status is Active. Below this, a section titled 'Picklists Available for Editing' lists three fields: Expected Days Of Return, Item Type, and Priority, each with its creation and modification date.

PERMISSION SETS :

*Permission sets are collections of settings and permissions that grant users access to specific tools or features.

*Standard permission sets save time by providing predefined permissions tied to a permission set license.

Created a permission set :

The screenshot shows the 'Permission Sets' page in the Salesforce Setup. At the top, there's a header with a user icon, 'SETUP', and 'Permission Sets'. Below the header, the page title is 'Permission Sets'. A sub-header says 'On this page you can create, view, and manage permission sets.' There's a navigation bar with 'All Permission Sets' (with a dropdown arrow), 'Edit | Delete | Create New View', and a search bar. To the right of the search bar are links for 'A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q'. The main content area is a table with columns: 'Action', 'Permission Set Name', 'Description', and 'License'. The table lists several permission sets, including 'Partner Connect Partner Admin Setup', 'Payments Administrator', 'Per to Worker' (which has a blue arrow pointing to it), 'Prompt Template Manager', 'Prompt Template User', 'PromptTemplatePermSet', and 'Publish Suggested for You Nudges: Integration User'. Each row includes a checkbox under 'Action' and a link under 'Permission Set Name'.

The screenshot shows the 'Per to Worker' permission set details page. At the top, there's a header with a user icon, 'SETUP', and 'Permission Sets'. Below the header, the page title is 'Permission Set Per to Worker'. There's a sub-header with 'Video Tutorial | Help for this Page' and a search bar. The main content area is divided into sections: 'Permission Set Overview' and 'Apps'. The 'Permission Set Overview' section contains fields for 'Description' (empty), 'API Name' (Per_to_Worker), 'Namespace Prefix' (empty), 'License' (empty), 'Session Activation Required' (unchecked), 'Created By' (KARTHICK V 8/27/2025, 10:18 PM), 'Last Modified By' (KARTHICK V 8/27/2025, 10:20 PM), and 'Permission Set Groups Added To' (0). The 'Apps' section contains two subsections: 'Assigned Apps' (Settings that specify which apps are visible in the app menu) and 'Assigned Connected Apps' (Settings that specify which connected apps are visible in the app menu).

TRIGGER :

- *A trigger is Apex code that runs automatically before or after events like insert, update, or delete.
- *It helps automate processes and customize behavior when records change in Salesforce.
- ***Use case:** Update the *Paid Amount* on the *Billing* object based on the *Paying Amount* during insert and update actions.

Created a Trigger Handler class :

The screenshot shows the Salesforce IDE interface. The top navigation bar includes File, Edit, Debug, Test, Workspace, Help, and tabs for Logs, Tests, and Checks. The main area displays the code for `UpdatePaidAmountTriggerHandler.apxc`. The code defines two static methods: `handleBeforeInsert` and `handleBeforeUpdate`, both of which iterate through lists of `Billing__c` objects and update the `Paid_Amount__c` field to match the `Paying_Amount__c` field. A cursor is visible at the end of the `handleBeforeUpdate` method. Below the code editor, a modal dialog titled "Open" is displayed, listing entities such as Classes, Triggers, Pages, etc., with "UpdatePaidAmountTriggerHandler" selected. The bottom of the screen features a toolbar with Open, Filter, Hide Managed Packages, and Refresh buttons.

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

Created the trigger :

The screenshot shows the Salesforce IDE interface with the following details:

- File Bar:** File, Edit, Debug, Test, Workspace, Help.
- Tab:** UpdatePaidAmountTrigger.apxt
- API Version:** 64
- Code:**

```
1 trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {  
2     if (Trigger.isInsert) {  
3         UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);  
4     } else if (Trigger.isUpdate) {  
5         UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap, Trigger.new);  
6     }  
7 }  
8  
9 }  
10  
11 }  
12  
13 }
```
- Open Dialog:** An "Open" dialog is displayed, listing various entity types. The "Triggers" row is selected, and its details are shown in the "Entities" and "Related" sections.

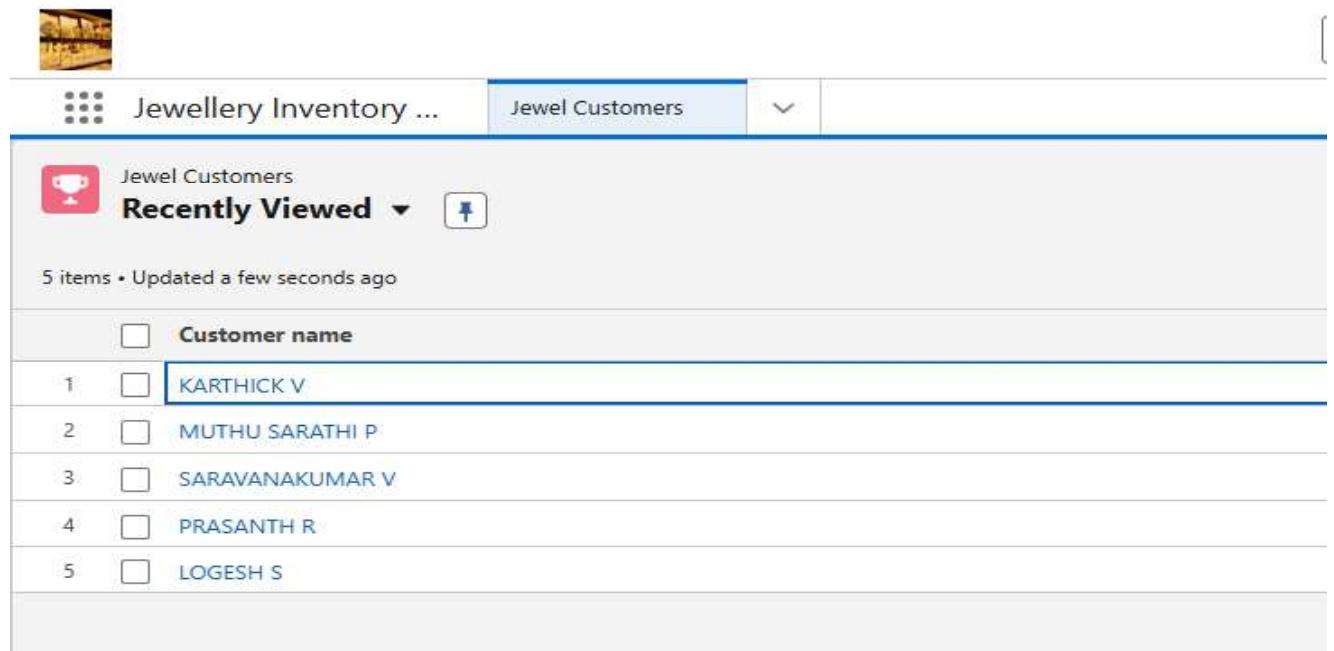
Entity Type	Entities	Related
Entity Type	Name	Namespace ▾
Classes	UpdatePaidAmountTrigger	↳ Billing__c SObject References
Triggers		↳ UpdatePaid... ApexClass References
Pages		
Page Components		
Objects		
Static Resources		
Packages		
- Buttons:** Open, Filter, Hide Managed Packages, Refresh.

USER ADOPTION :

*User Adoption involves managing users effectively to ensure they utilize Salesforce efficiently.

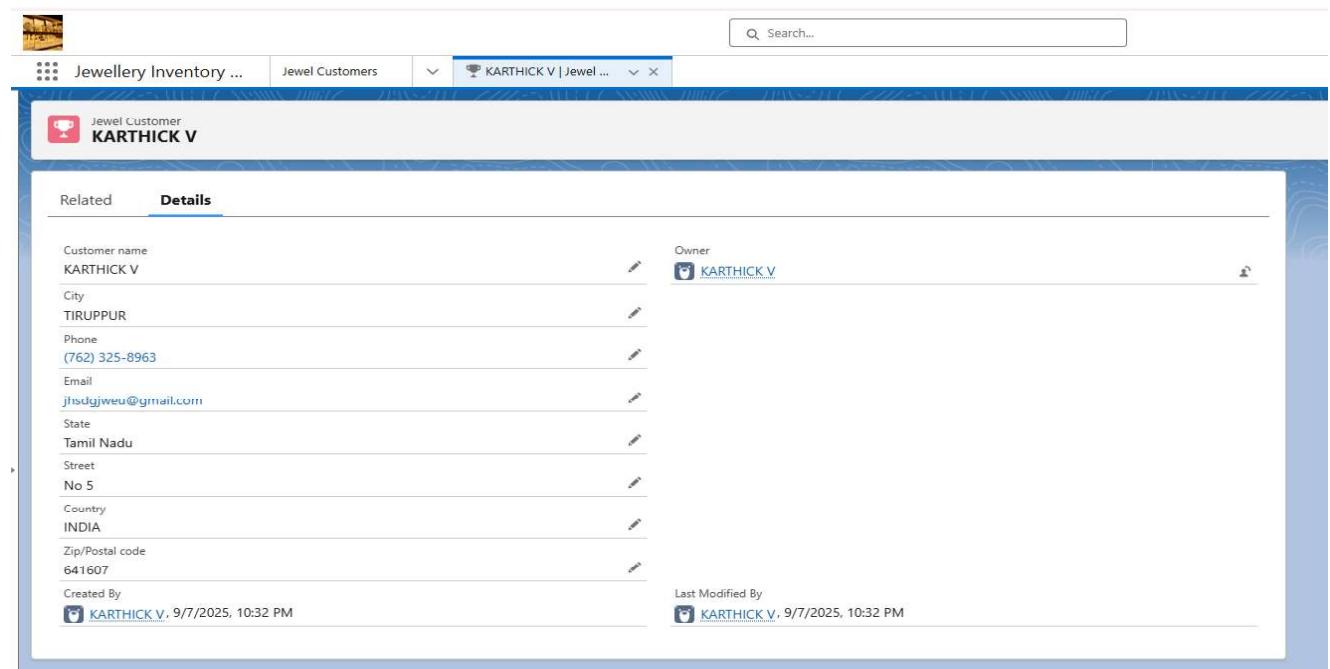
*As an admin, you handle tasks like creating users, setting permissions, and configuring data access.

Created a Record (Jewel Customer) :



The screenshot shows the 'Recently Viewed' list for 'Jewel Customers'. At the top, there's a header with a trophy icon and the text 'Jewel Customers Recently Viewed'. Below the header, it says '5 items • Updated a few seconds ago'. The list contains five entries, each with a checkbox and a name: 1. KARTHICK V, 2. MUTHU SARATHI P, 3. SARAVANAKUMAR V, 4. PRASANTH R, and 5. LOGESH S. The entry 'KARTHICK V' is currently selected, indicated by a blue border around the checkbox and the name.

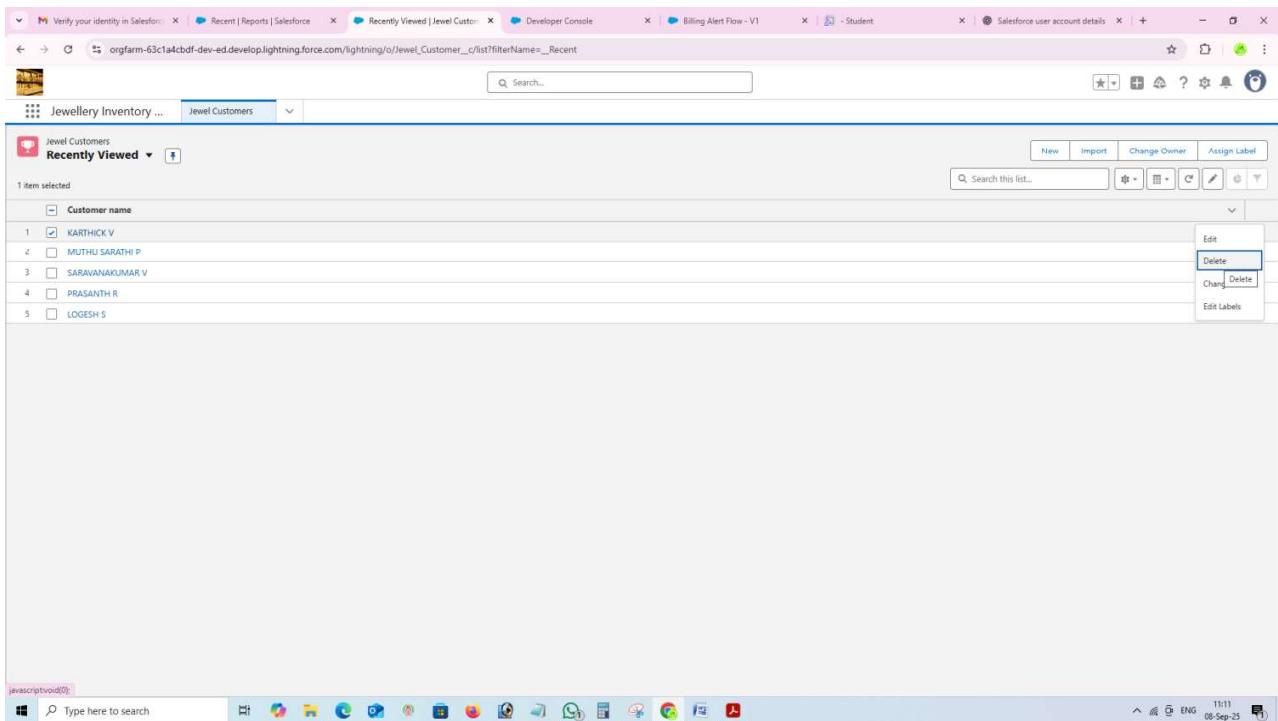
View a Record (Jewel Customer) :



The screenshot shows the details page for the 'KARTHICK V' customer record. The top navigation bar includes 'Jewellery Inventory ...', 'Jewel Customers', and the specific record URL 'KARTHICK V | Jewel ...'. The main content area has tabs for 'Related' and 'Details', with 'Details' being the active tab. The 'Details' section contains various fields with their values: Customer name (KARTHICK V), City (TIRUPPUR), Phone ((762) 325-8963), Email (jhsdgiweu@gmail.com), State (Tamil Nadu), Street (No 5), Country (INDIA), Zip/Postal code (641607), Owner (KARTHICK.V), and Last Modified By (KARTHICK.V). There are also edit icons next to most of the text fields.

Deleted a Record(Jewel Customer) :

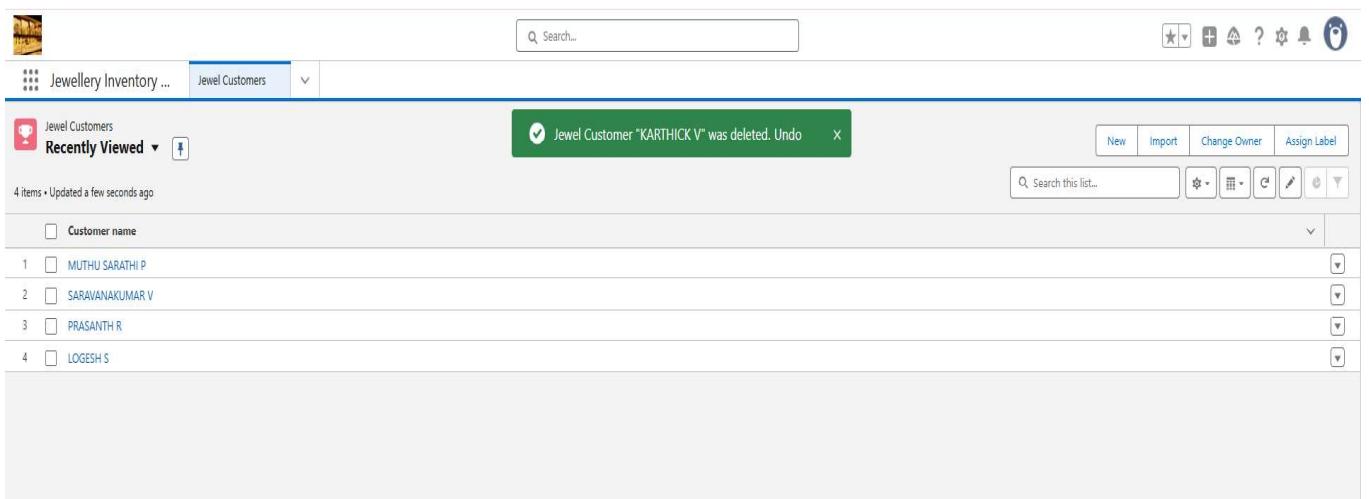
BEFORE DELETED :



The screenshot shows the 'Jewel Customers' list view in the Salesforce Lightning interface. The list contains the following entries:

Customer name
1 <input checked="" type="checkbox"/> KARTHICK V
2 <input type="checkbox"/> MUTHU SARATHI P
3 <input type="checkbox"/> SARAVANAKUMAR V
4 <input type="checkbox"/> PRASANTH R
5 <input type="checkbox"/> LOGESH S

AFTER DELETED :



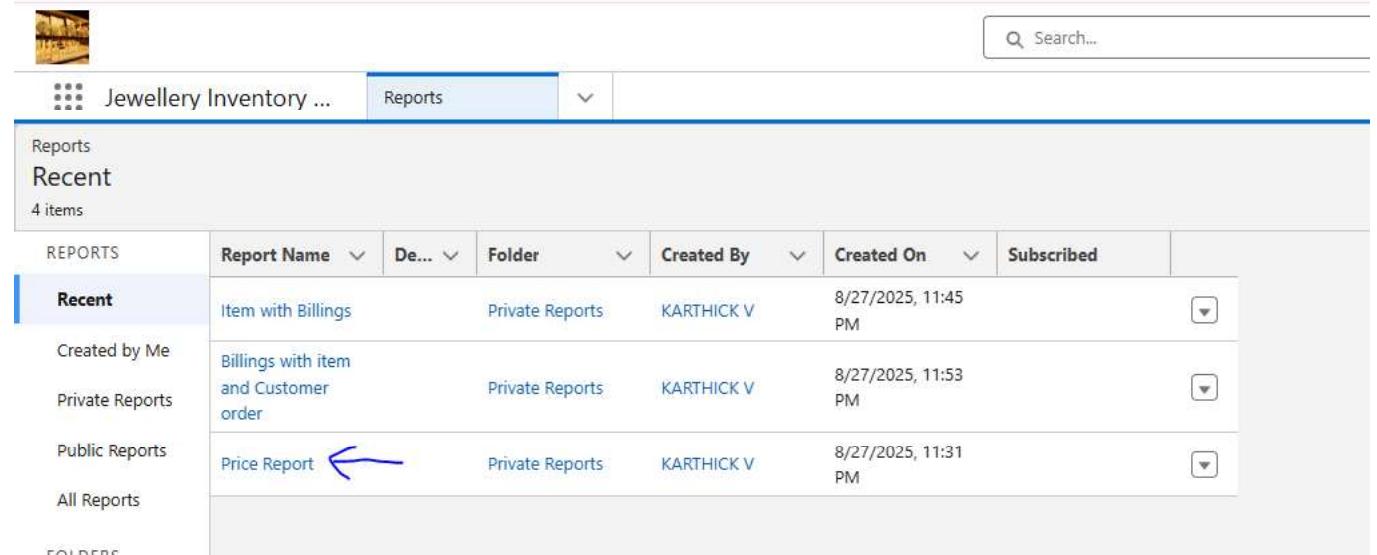
The screenshot shows the 'Jewel Customers' list view in the Salesforce Lightning interface after the 'KARTHICK V' record was deleted. A success message at the top right indicates the deletion: "Jewel Customer 'KARTHICK V' was deleted. Undo X". The list now contains the following entries:

Customer name
1 <input type="checkbox"/> MUTHU SARATHI P
2 <input type="checkbox"/> SARAVANAKUMAR V
3 <input type="checkbox"/> PRASANTH R
4 <input type="checkbox"/> LOGESH S

REPORTS :

- *Reports in Salesforce help you view and analyze data in various formats like Tabular, Summary, Matrix, and Joined.
- *They allow you to organize and share key insights for better decision-making.
- ***Use case:** Create reports on Gold Items, Silver Items, Customer Orders, and Billings to give GoldSmith a clear business overview.

Created Price Reports:



The screenshot shows the Salesforce Reports page. The top navigation bar includes a search bar and tabs for 'Jewellery Inventory ...' and 'Reports'. The left sidebar shows categories: Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), Folders, and a Recent section with 4 items. The main table lists reports with columns for Report Name, Description, Folder, Created By, and Created On. The 'Price Report' row is highlighted with a blue arrow pointing to it. The report details page below shows a summary table with Total Records (1) and Total Gold Price (\$9,000). It also displays a table of price records with columns for Price ID, Gold Price, and Price Price Id, containing two rows of data.

Report Name	Description	Folder	Created By	Created On
Item with Billings	Private Reports	KARTHICK V	8/27/2025, 11:45 PM	
Billings with item and Customer order	Private Reports	KARTHICK V	8/27/2025, 11:53 PM	
Price Report	Private Reports	KARTHICK V	8/27/2025, 11:31 PM	

Total Records	Total Gold Price
1	\$9,000

	Price: ID	Gold Price	Price: Price Id
1	a03gL00000AnXhp	\$9,000	Price-01
2		\$9,000	

Created Item With Billings Report:

The screenshot shows a software application window titled "Jewellery Inventory ...". In the top right corner, there is a dropdown menu with the option "Reports" selected. Below it, another dropdown menu is open, showing "Item with Billings" as the active choice. The main content area displays a report titled "Report: Billings with Item Item with Billings". It shows a single record with the following details:

	Billing: Billing Id	Item: Item Id
1	Billing-01	Item-01

Created Billing With Item And Customer Order Report:

The screenshot shows a software application window titled "Jewellery Inventory ...". In the top right corner, there is a dropdown menu with the option "Reports" selected. Below it, another dropdown menu is open, showing "Billings with item an..." as the active choice. The main content area displays a report titled "Report: Items with Customer Orders Billings with item and Customer order". It shows a single record with the following details:

	Item: Item Id	Customer Order: Customer Order Id
1	Item-01	Customer Order-01

DASHBOARDS :

- *Dashboards in Salesforce provide visual representations of report data to help track trends and performance in real time.
- *They make it easier for users to interpret data quickly using charts, graphs, and metrics.
- ***Use case:** As an Admin, you create dashboards for GoldSmith to easily view key reports without searching through raw data.

Created Dashboard 1 :

The screenshot shows a Salesforce dashboard interface. At the top, there is a navigation bar with a search bar on the right. Below the navigation bar, the main area displays a dashboard titled "Dashboard 1". The dashboard header includes a clock icon, the title "Dashboard 1", and a timestamp "As of Sep 7, 2025, 11:20 PM · Viewing as KARTHICK V". A sub-header "Price Report" is visible above a data card. The data card contains a table with three columns: "Price: ID ↑", "Gold Price", and "Price: Price Id". The first column has a single row with the value "a03gL00000AnXhp". The second column has a single row with the value "\$9k". The third column has a single row with the value "Price-01". At the bottom of the data card, there are two links: "View Report (Price Report)" on the left and "As of Sep 7, 2025, 11:20 PM" on the right.

Price: ID ↑	Gold Price	Price: Price Id
a03gL00000AnXhp	\$9k	Price-01

Created Dashboard 2 :

The screenshot shows a dashboard titled "Dashboard 2" with a subtitle "As of Sep 7, 2025, 11:26 PM · Viewing as KARTHICK V". The main content is a table titled "Item with Billings" with two columns: "Billing: Billing Id ↑" and "Item: Item Id". The table contains one row with values "Billing-01" and "Item-01".

Billing: Billing Id ↑	Item: Item Id
Billing-01	Item-01

[View Report \(Item with Billings\)](#) As of Sep 7, 2025, 11:26 PM

Created Dashboard 3 :

The screenshot shows a dashboard titled "Dashboard 3" with a subtitle "As of Sep 7, 2025, 11:27 PM · Viewing as KARTHICK V". The main content is a table titled "Billings with item and Customer order" with two columns: "Item: Item Id ↑" and "Customer Order: Customer Order Id". The table contains one row with values "Item-01" and "Customer Order-01".

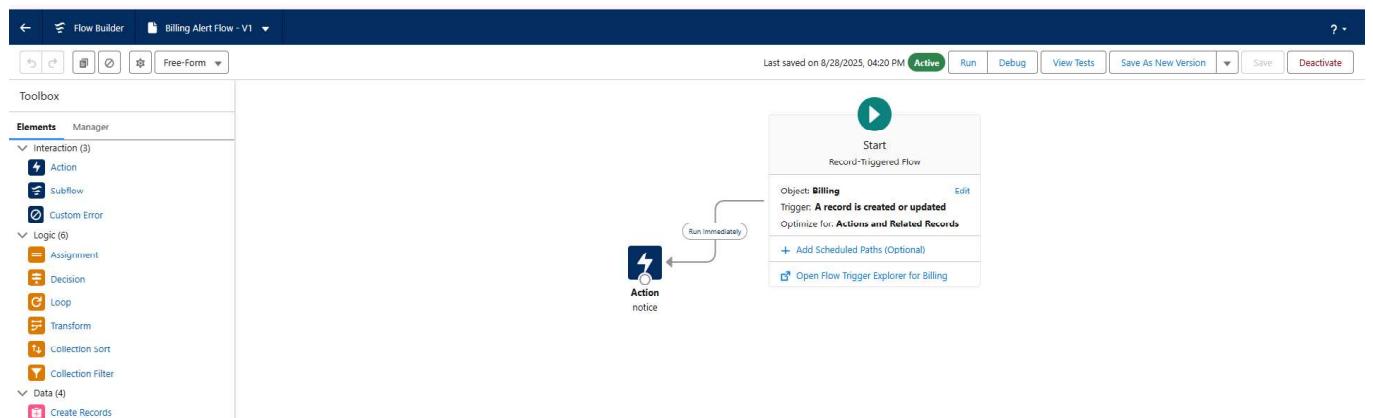
Item: Item Id ↑	Customer Order: Customer Order Id
Item-01	Customer Order-01

[View Report \(Billings with item and Customer order\)](#) As of Sep 7, 2025, 11:27 PM

FLOW :

- *Flows in Salesforce are visual tools used to automate business processes without writing code.
- *They guide users through steps, collect/update data, and handle tasks like record updates or email triggers.
- ***Use case:** Use Flows to streamline complex processes through a drag-and-drop interface for efficient automation.

Created a Flow :



The screenshot shows the "Flow Definitions" page under the "SETUP" tab. It displays a list of flows, with "Billing Alert Flow" highlighted. The table includes columns for Flow Label, Process Type, Active status, Template, Package State, Package Name, Last Modified By, and Last Modified Date. A blue arrow points to the "Billing Alert Flow" row.

Flow Label	Process Type	Active	Template	Package State	Package Name	Last Modified By	Last Modified Date
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-installed			
Approvals Workflow: Evaluate Approval Requests	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Approvals Workflow: Process Approval Submission	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-installed			
Authentication Provider User Registration	Identity User Registration Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Billing Alert Flow	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged	KARTHICK V	8/28/2025, 3:50 AM	
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Chats Routed to Agents and Queues	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			

RESULTS :

Output Screenshots :

❖ Tabs For Billings,Customer Orders,Items,Jewel Customers,Prices

The screenshot shows the 'Custom Tabs' section of the Salesforce Setup. It displays a table of custom object tabs with columns for Action, Label, Tab Style, and Description. The tabs listed are:

Action	Label	Tab Style	Description
Edit Del	Billings	Credit card	
Edit Del	Customer Orders	Factory	
Edit Del	Items	Pencil	
Edit Del	Jewel Customers	Trophy	
Edit Del	Prices	Bank	

❖ APP DASHBOARD :

The screenshot shows the 'Dashboard 1' card on the Salesforce App Dashboard. The card title is 'Price Report' and it displays a table of price records. The table has three columns: 'Price ID', 'Gold Price', and 'Price Price Id'. The data is as follows:

Price ID	Gold Price	Price Price Id
a03gL00000AnXhp	\$9k	Price-01
a03gL00000BjghV	\$7k	Price-02

At the bottom of the card, there are links for 'View Report (Price Report)' and 'As of Sep 8, 2025, 4:09 AM'.

❖ JEWEL CUSTOMER RECORD PAGE :

The screenshot shows a software interface for managing jewel customers. At the top, there's a navigation bar with icons for search, filters, and other functions. Below it, a header bar indicates the current section: "Jewellery Inventory ..." and "Jewel Customers". A sub-header "Recently Viewed" is displayed with a dropdown arrow. A message "4 items • Updated a few seconds ago" is shown. The main content area lists four customers with checkboxes next to their names:

	Customer name	Action
1	MUTHU SARATHI P	✓
2	SARAVANAKUMAR V	✓
3	PRASANTH R	✓
4	LOGESH S	✓

❖ JEWEL REPORT :

The screenshot shows a software interface for generating reports. At the top, there's a navigation bar with icons for search, filters, and other functions. Below it, a header bar indicates the current section: "Jewellery Inventory ..." and "Reports". A sub-header "Price Report" is displayed with a dropdown arrow. A message "Total Records 2 Total Gold Price \$16,200" is shown. The main content area displays a "Report Prices" section titled "Price Report". It shows a summary table with two rows:

Total Records	Total Gold Price
2	\$16,200

Below this, a detailed table shows three price entries:

	Price: ID	Gold Price	Price: Price Id
1	a03gL00000AnXhp	\$9,000	Price-01
2	a03gL00000BjghV	\$7,200	Price 02
3		\$16,200	

ADVANTAGES & DIS ADVANTAGES :

ADVANTAGES :

- ❖ Tracks metal type, weight, price, and quantity per item.
- ❖ Eliminates manual data entry errors
- ❖ Stores customer details and purchase history
- ❖ Helps managers make **data-driven decisions**
- ❖ Reduces mistakes using **Validation Rules** and **Field Dependencies**
- ❖ Customized Lightning Pages for easy data entry
- ❖ Reduces training time for new staff
- ❖ Easy to add new jewellery types, stores, or processes in future
- ❖ Uses Salesforce profiles and permission sets
- ❖ Ensures that only authorized users can view or modify sensitive data

DIS ADVANTAGES :

- ❖ The app works only within Salesforce; integration with external platforms needs **custom APIs** or third-party tools.
- ❖ No support for scanning barcodes or using RFID for physical inventory checks.
- ❖ Needs improvement for complex inventory scenarios.
- ❖ Sales Order confirms but **actual payment collection is manual or outside the system.**
- ❖ New customer records are entered manually.
- ❖ All users may see the same dashboard view.
- ❖ Requires internet and Salesforce login.
- ❖ No offline access for stock audits or mobile order entries in remote areas.

CONCLUSION :

The Jewellery CRM application effectively streamlines inventory and sales processes using Salesforce tools like flows, validation rules. It improves data accuracy, automates order management, and enhances customer communication. The system offers a user-friendly interface and real-time reporting for better decision-making. This project demonstrates strong practical knowledge of Salesforce development. While effective, future enhancements like payment integration and barcode scanning can further improve its functionality. Overall, it delivers a smart solution tailored for jewellery business needs.