

CRM APPLICATION FOR JEWEL MANAGEMENT

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Project Overview

A CRM (Customer Relationship Management) system designed for the jewelry industry is specialized software that centralizes customer data, sales processes, inventory management, and marketing automation in one platform, tailored to the unique demands of jewelry retailers. These applications help businesses build stronger, personalized relationships with customers who often make high-value, infrequent purchases requiring careful nurturing over time.

Benefits of Using CRM in Jewelry Businesses

Jewelry CRM software simplifies and improves several critical aspects of business operations:

- **Customer Data Management:** Centralizes and securely stores customer details, purchase histories, preferences (such as ring sizes, metal allergies), and important dates like birthdays and anniversaries.
- **Personalized Customer Engagement:** Enables targeted communication through automated emails or SMS about special offers, order updates, or reminders tailored to customer preferences.
- **Sales and Inventory Management:** Tracks inventory levels with detailed gemstone and metal specifications, monitors custom orders and repairs, manages sales pipelines and payment plans, and forecasts demand.
- **Enhanced Customer Service:** Equips support teams with real-time access to customer profiles, order status, and service history to resolve queries efficiently.
- **Multi-Channel Integration:** Synchronizes data across physical stores, e-commerce platforms, and marketplaces for a seamless customer experience.

Key Features of Jewelry CRM Applications

Effective CRM systems for jewelry stores often include:

- **Contact & Customer Profile Management:** Detailed tracking of purchase history, preferences, and communication logs.
- **Inventory Management:** Specialized tools to monitor precious metals, gemstones, certifications, serial numbers, and stock levels.
- **Custom Job and Repair Tracking:** Manage bespoke design orders, repairs, and modifications with progress updates.
- **Automation for Marketing & Follow-ups:** Sends birthday/anniversary greetings, promotional offers, and payment reminders automatically.
- **Analytics & Reporting:** Provides insights into sales trends, customer segmentation, lead tracking, and ROI of marketing campaigns.
- **Document Management:** Stores important documents such as appraisal certificates and design sketches securely.
- **Communication Tools:** Logs and transcribes calls, emails, SMS for consistent and personalized customer interactions.

The screenshot shows a web browser window with the URL naanmudhalvan.smartinternz.com/Student/guided_project_info/45341#. The page title is "CRM Application For Jewel Management - (Developer)". On the left, there is a sidebar with a green header containing the title and a list of orange buttons with plus signs and text: "Salesforce", "Object", "Tabs", "The Lightning App", "Fields", "Profiles", "Roles", "Users", "Page Layouts", "Record Types", and "Permission Sets". The main content area contains the title again, followed by a paragraph about the Jewel Inventory System, and a section titled "What you'll learn" with a numbered list from 1 to 13.

CRM Application For Jewel Management - (Developer)

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.

What you'll learn

1. Real Time Salesforce Project
2. Data Modelling
3. Creating an Application
4. User Interface Customization
5. Object & Relationship in Salesforce
6. Formula fields and Validation rules.
7. Field Dependencies
8. Record Types
9. Cross object formula fields.
10. Conditional formatting.
11. Flows
12. Email alerts and email templates
13. Reports & Dashboards

This screenshot is similar to the one above, but the sidebar on the left has a different set of buttons: "The Lightning App", "Fields", "Profiles", "Roles", "Users", "Page Layouts", "Record Types", "Permission Sets", "Trigger", "User Adoption", "Reports", "Dashboards", and "Flows". The main content area is identical to the first screenshot.

CRM Application For Jewel Management - (Developer)

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.

What you'll learn

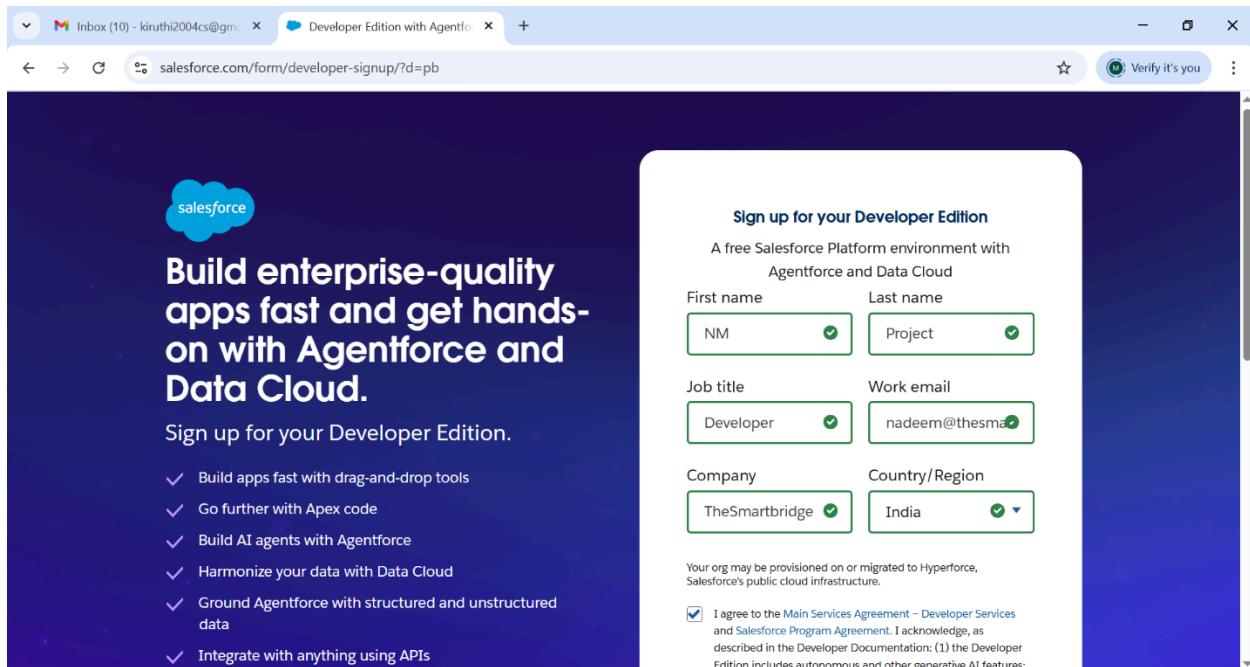
1. Real Time Salesforce Project
2. Data Modelling
3. Creating an Application
4. User Interface Customization
5. Object & Relationship in Salesforce
6. Formula fields and Validation rules.
7. Field Dependencies
8. Record Types
9. Cross object formula fields.
10. Conditional formatting.
11. Flows
12. Email alerts and email templates
13. Reports & Dashboards

DEVELOPMENT PHASE:

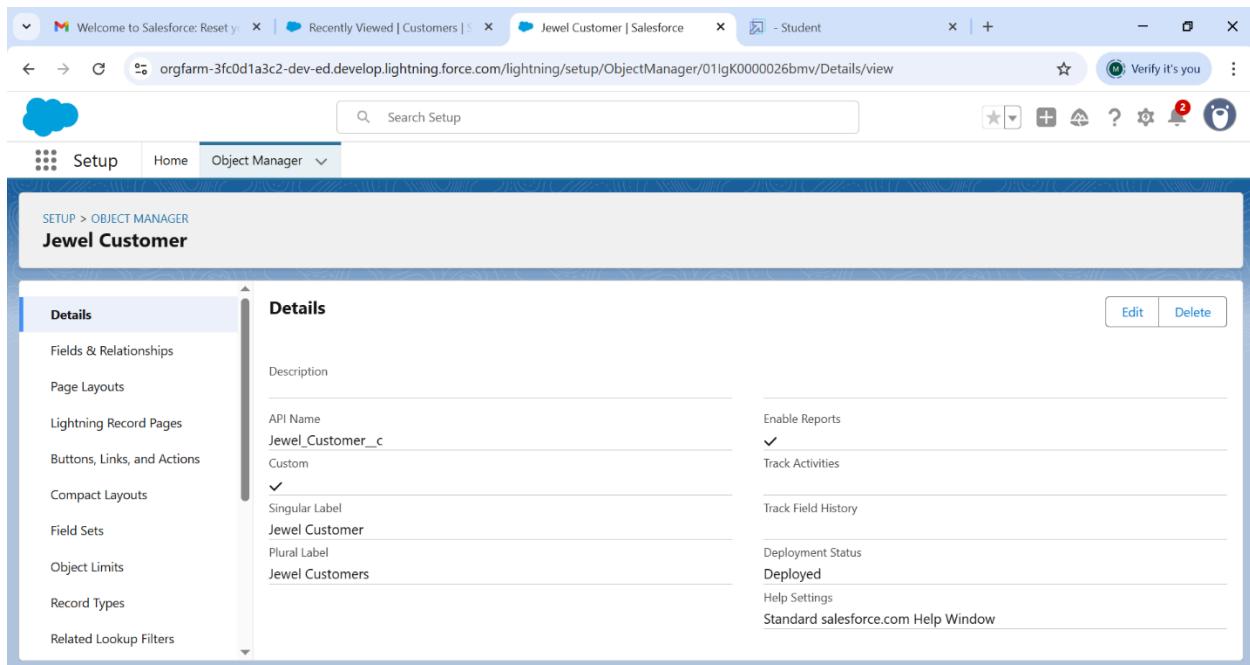
Creating developer account

By using this URL-

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



Create a Objects: Jewel customer&item object



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Item'. 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, and Related Lookup Filters. The main content area is titled 'Details' and contains fields for Description, API Name (set to 'Item__c'), Custom (checked), Singular Label (set to 'Item'), Plural Label (set to 'Items'), Enable Reports (checked), Track Activities, Track Field History, Deployment Status (set to 'Deployed'), and Help Settings (set to 'Standard salesforce.com Help Window'). At the bottom right are 'Edit' and 'Delete' buttons.

Tabs

1. Customer Orders / Order Management

- This tab manages the entire lifecycle of a customer's order — from order placement, tracking custom designs or repairs, status updates, to completion.
- It includes capturing order details, order history, special customization requests, shipping information, and repair tracking.

2. Billing / Invoicing

- A dedicated tab for generating, processing, and tracking customer invoices and payments.
- It supports billing automation including layaway plan management, installment tracking, and sending payment reminders for outstanding balances.

2. Pricing Management / Product Pricing

- This section handles setting, adjusting, and updating prices for jewelry items, including real-time updates based on precious metal and gemstone market fluctuations.
- It may allow for different pricing structures such as wholesale, retail, promotional discounts, and pricing for custom orders.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has a search bar and navigation links for 'Feature Settings' (Analytics, Tableau), 'User Interface' (Console Settings, Rename Tabs and Labels), and 'Tabs'. The main content area is titled 'Customer Orders' and shows a 'Custom Tab Definition Detail' table:

Custom Tab Definition Detail		Edit	Delete
Tab Label	Customer Orders	Tab Style	
Object	Customer Order	Splash Page	Custom Link
Description			
Created By	MALATHISINDUPRABHAA, 9/11/2025, 9:20 AM		
Modified By	MALATHISINDUPRABHAA, 9/11/2025, 9:20 AM		

Below the table, a note says: 'Below is the information for the custom tab. Click Edit to change the custom tab.'

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with sections like Feature Settings (Analytics, Tableau), User Interface (Console Settings, Tabs), and Tabs. The 'Tabs' section is currently selected. In the main area, a search bar shows 'tab'. A card titled 'Custom Object Tab Prices' is displayed, showing the 'Custom Tab Definition Detail' for the 'Prices' tab. The tab has a 'Tab Label' of 'Prices', an 'Object' of 'Price', and a 'Tab Style' of 'Dice'. It was created by 'MALATHISINDUPRABHA' on 9/11/2025 at 9:25 AM and modified by the same user on the same date and time.

This screenshot is similar to the one above but shows the creation of a new custom tab named 'Billings'. The 'Tab Label' is 'Billings', the 'Object' is 'Billing', and the 'Tab Style' is 'Building'. The rest of the information is identical to the 'Prices' tab.

To Create a Lighting App

Creating a lighting app can mean different things depending on the context—whether it's a mobile app to control smart lights, an app to simulate lighting effects, or a simple flashlight app. Below, I will guide you through the general steps to create a lighting app, focusing mainly on controlling smart lights or building a basic flashlight app.

Welcome to Salesforce: Reset your password

Recently Viewed | Customers | App Manager | Salesforce - Student

orgfarm-3fc0d1a3c2-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Verify it's you

New Lightning App

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

App Details

* App Name: Jewellery Inventory System

* Developer Name: Jewellery_Inventory_System

Description: Elevate your look with elegance

App Branding

Image:

Primary Color Hex: Value #0070D2

Org Theme Options: Use the app's image and color instead of the org's custom theme

Next

External Client Apps

Order	Content	Content	Salesforce CRM Content	Created Date	Experience	Default
8	Content	Content	Salesforce CRM Content	7/30/2025, 9:41 PM	Classic	<input checked="" type="checkbox"/>
9	Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	7/30/2025, 9:41 PM	Lightning	<input checked="" type="checkbox"/>
10	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage re	7/30/2025, 9:41 PM	Lightning	<input checked="" type="checkbox"/>

Welcome to Salesforce: Reset your password

Recently Viewed | Customers | App Manager | Salesforce - Student

orgfarm-3fc0d1a3c2-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Verify it's you

New Lightning App

Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app.

Add Utility Item

Utility Bar Alignment: Default

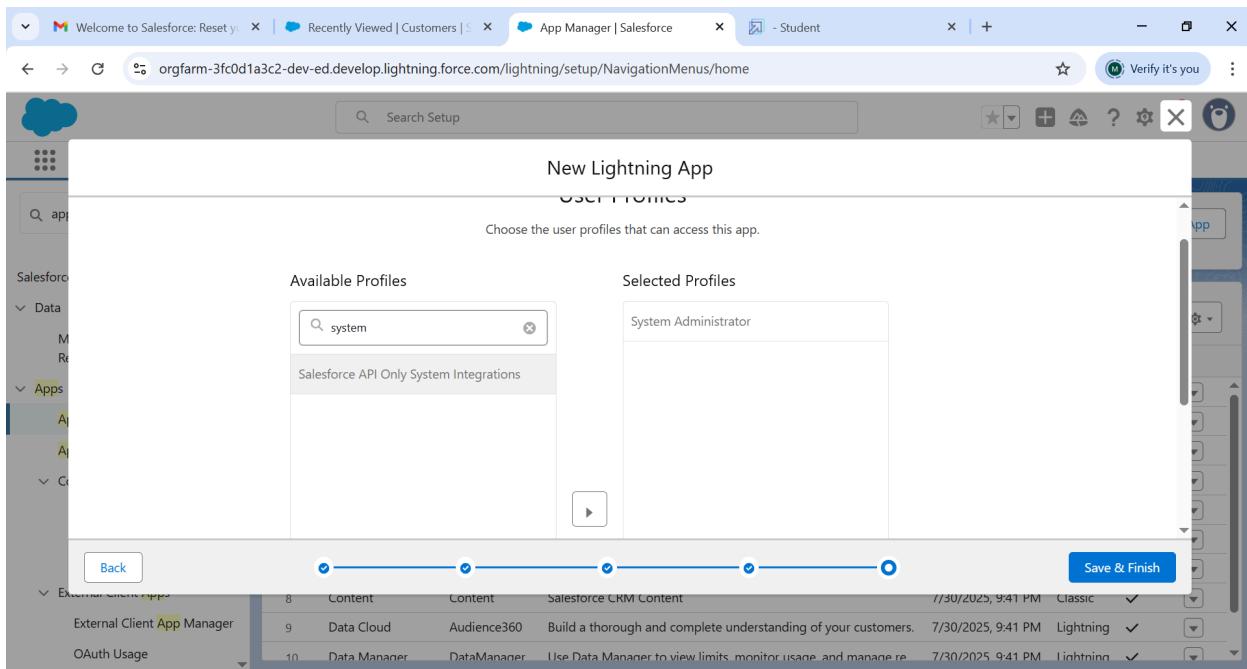
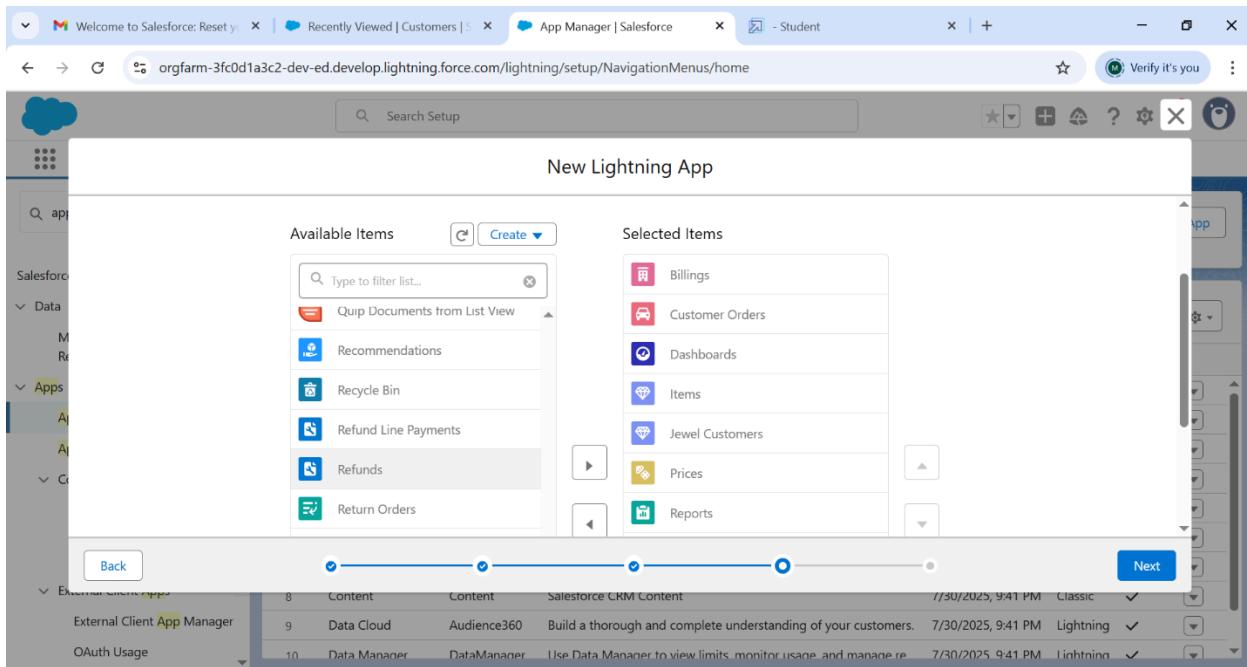
The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.

Back

Next

External Client Apps

Order	Content	Content	Salesforce CRM Content	Created Date	Experience	Default
8	Content	Content	Salesforce CRM Content	7/30/2025, 9:41 PM	Classic	<input checked="" type="checkbox"/>
9	Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	7/30/2025, 9:41 PM	Lightning	<input checked="" type="checkbox"/>
10	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage re	7/30/2025, 9:41 PM	Lightning	<input checked="" type="checkbox"/>



To Create a Fields

1. Account Object Fields

- **Account Name** (Name): The primary identifier for the company or organization.
- **Account Owner** (OwnerId): The user responsible for the account.
- **Industry** (Industry): Industry classification, useful for segmentation and reporting.
- **Type** (Type): Describes the account type (Customer, Partner, Prospect).
- **Billing & Shipping Address**: Address fields for logistics and contact information.

2. Contact Object Fields

- **Contact Name** (Name): Full name of the person.
- **Email** (Email): Primary email contact.
- **Phone** (Phone): Telephone number.
- **AccountId**: Lookup to the associated Account record, linking the contact with the organization.
- **Title** (Title): Job position, useful for segmentation.

3. Lead Object Fields

- **Lead Name** (Name): Prospective customer name.
- **Company** (Company): Organization associated with the lead.
- **Status** (Status): Current stage of the lead (Open, Contacted, Qualified).
- **Lead Source** (LeadSource): Origin of the lead (Web, Referral, Marketing Campaign).
- **Email & Phone**: Contact details.

4. Opportunity Object Fields

- **Opportunity Name** (Name): Deal or sales opportunity name.
- **Stage** (StageName): Sales process stage (Prospecting, Negotiation, Closed Won, Closed Lost).
- **Close Date** (CloseDate): Expected close date for the deal.
- **Amount** (Amount): Potential revenue amount.
- **AccountId**: Links opportunity to an Account.

5. Case Object Fields (**For Support & Service**)

- **Case Number** (CaseNumber): Unique identifier.
- **Subject** (Subject): Brief description of issue.
- **Status** (Status): Current case state (New, Working, Closed).
- **Priority** (Priority): Case urgency.
- **ContactId** and **AccountId**: Links to the affected contact and account.

Lightning-Specific Considerations

- **Custom Fields**: Alongside standard fields, developers often create custom fields to capture unique business data. These can be text, picklists, lookups, formula fields, or roll-up summaries.
- **Field-Level Security**: In Lightning apps, fields respect their security and visibility settings, so developers must ensure that components and flows account for field accessibility.
- **Dynamic Forms**: Lightning allows configuring fields dynamically on page layouts, so knowing key fields helps optimize user views.

- **Validation Rules and Dependencies:** Understanding common CRM fields helps build strong validation logic and picklist dependencies enhancing data quality.

The screenshot displays the Salesforce Object Manager interface for the 'Customer Order' object. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The main content area shows the 'Customer Order' object details under the 'Object Manager' tab. The 'Fields & Relationships' tab is currently selected. Key sections visible include:

- Field Usage:** Data Sensitivity Level, Compliance Categorization.
- Created By:** MALATHISINDUPRABHAA, 9/8/2025, 7:20 AM
- Modified By:** MALATHISINDUPRABHAA, 9/8/2025, 7:20 AM
- Master-Detail Options:** Related To: Item, Related List Label: Customer Orders, Child Relationship Name: Customer_Orders, Sharing Setting: Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records, Reparentable Master Detail:
- Lookup Filter:** No lookup filters defined.
- Validation Rules:** A 'New' button is present, and the message 'No validation rules defined.' is displayed.

The left sidebar lists other configuration options: Details, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. At the bottom, there are links to 'Back To Top' and 'Always show me ▾ more records per related list'.

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

Page Header: Welcome to Salesforce: Reset your password | Recently Viewed | Customers | Jewel Customer | Salesforce | - Student

Search Bar: Search Setup

Navigation: Setup | Home | Object Manager

Breadcrumbs: SETUP > OBJECT MANAGER | Jewel Customer

Section: Fields & Relationships

Object: Jewel Customer Custom Field | City

Buttons: Back to Jewel Customer | Validation Rules [0] | Help for this Page [?]

Custom Field Definition Detail:

- Field Information:**

Field Label	City	Object Name	Jewel Customer
Field Name	City	Data Type	Text
API Name	City__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
- General Options:**

Created By	MALATHISINDUPRABHAA	9/7/2025, 11:11 PM	Modified By	MALATHISINDUPRABHAA	9/7/2025, 11:11 PM
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Welcome to Salesforce: Reset your password

Recently Viewed | Customers | Jewel Customer | Salesforce - Student

orgfarm-3fc0d1a3c2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK0000026bmv/FieldsAndRelationships/00NgK00...

Verify it's you

Cloud icon

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

Phone

Back to Jewel Customer

Validation Rules [0]

Custom Field Definition Detail

Help for this Page

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Phone	Object Name	Jewel Customer
Field Name	Phone	Data Type	Phone
API Name	Phone__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MALATHISINDUPRABHAA	Modified By	MALATHISINDUPRABHAA
	9/7/2025, 11:13 PM		9/7/2025, 11:13 PM

General Options

Welcome to Salesforce: Reset your password

Recently Viewed | Customers | Jewel Customer | Salesforce - Student

orgfarm-3fc0d1a3c2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK0000026bmv/FieldsAndRelationships/00NgK00...

Verify it's you

Cloud icon

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

Email

Back to Jewel Customer

Validation Rules [0]

Custom Field Definition Detail

Help for this Page

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Email	Object Name	Jewel Customer
Field Name	Email	Data Type	Email
API Name	Email__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MALATHISINDUPRABHAA	Modified By	MALATHISINDUPRABHAA
	9/7/2025, 11:14 PM		9/7/2025, 11:14 PM

General Options

Welcome to Salesforce: Reset your password

Recently Viewed | Customers | Item | Salesforce

- Student

orgfarm-3fc0d1a3c2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK0000026byD/FieldsAndRelationships/00NgK0000... Verify it's you

Cloud Search Setup Object Manager

SETUP > OBJECT MANAGER Item

Item Custom Field Purity

Custom Field Definition Detail

Field Information

Field Label	Purity	Object Name	Item
Field Name	Purity	Data Type	Number
API Name	Purity__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MALATHISINDUPRABHA	Modified By	MALATHISINDUPRABHA
	9/7/2025, 11:15 PM		9/7/2025, 11:15 PM

General Options

Help for this Page

Welcome to Salesforce: Reset your password

Recently Viewed | Customers | Item | Salesforce

- Student

orgfarm-3fc0d1a3c2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK0000026byD/FieldsAndRelationships/00NgK0000... Verify it's you

Cloud Search Setup Object Manager

SETUP > OBJECT MANAGER Item

Item Custom Field Item Type

Custom Field Definition Detail

Field Information

Field Label	Item Type	Object Name	Item
Field Name	Item_Type	Data Type	Picklist
API Name	Item_Type__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MALATHISINDUPRABHA	Modified By	MALATHISINDUPRABHA
	9/7/2025, 11:18 PM		9/7/2025, 11:18 PM

General Options

Help for this Page

Welcome to Salesforce: Reset your password

Recently Viewed | Customers | Price | Salesforce

- Student

orgfarm-3fc0d1a3c2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK0000026daD/FieldsAndRelationships/00NgK0000... Verify it's you

Setup Home Object Manager

SETUP > OBJECT MANAGER

Price

Gold Price

Custom Field Definition Detail

Field Label: Gold Price
Field Name: Gold_Price
API Name: Gold_Price_c
Description:
Help Text:
Data Owner:
Field Usage:
Data Sensitivity Level:
Compliance Categorization:
Created By: MALATHISINDUPRABHAA 9/7/2025, 11:20 PM
Modified By: MALATHISINDUPRABHAA 9/7/2025, 11:20 PM

Object Name: Price
Data Type: Currency

Validation Rules (0)

Help for this Page

Fields & Relationships

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

General Options

Welcome to Salesforce: Reset your password

Recently Viewed | Customers | Item | Salesforce

- Student

orgfarm-3fc0d1a3c2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK0000026byD/FieldsAndRelationships/00NgK0000...

Verify it's you

Cloud Search Setup Object Manager

Item

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

Item Custom Field
Gold Price
Back to Item

Custom Field Definition Detail

Help for this Page

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Gold Price	Object Name	Item
Field Name	Gold_Price		
API Name	Gold_Price_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MALATHISINDUPRABHAA	Created On	9/8/2025, 7:53 AM
Modified By	MALATHISINDUPRABHAA	Modified On	9/8/2025, 7:53 AM

Formula Options

Welcome to Salesforce: Reset your password

Recently Viewed | Customers | Item | Salesforce

- Student

orgfarm-3fc0d1a3c2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK0000026byD/FieldsAndRelationships/viewDepen...

Verify it's you

Cloud Search Setup Object Manager

Item

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

Item Field Dependencies

< Back to Custom Object: Item

This page allows you to define dependencies between fields (e.g., dependent picklists).

Field Dependencies

New

Action	Controlling Field	Dependent Field	Modified By
Edit Del	Priority	Expected Days Of Return	MALATHISINDUPRABHAA, 9/8/2025, 8:29 AM

The screenshot shows the Salesforce Object Manager interface. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area is titled "Jewel Customer Validation Rule". It displays a "Validation Rule Detail" card with the following information:

- 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", select the Error location as Field and select the field as "Zip/Postal code"
- Description:** Created By: MALATHISINDUPRABHAA, 9/8/2025, 8:37 AM
- Created By:** MALATHISINDUPRABHAA, 9/8/2025, 8:37 AM

To Create a Profile

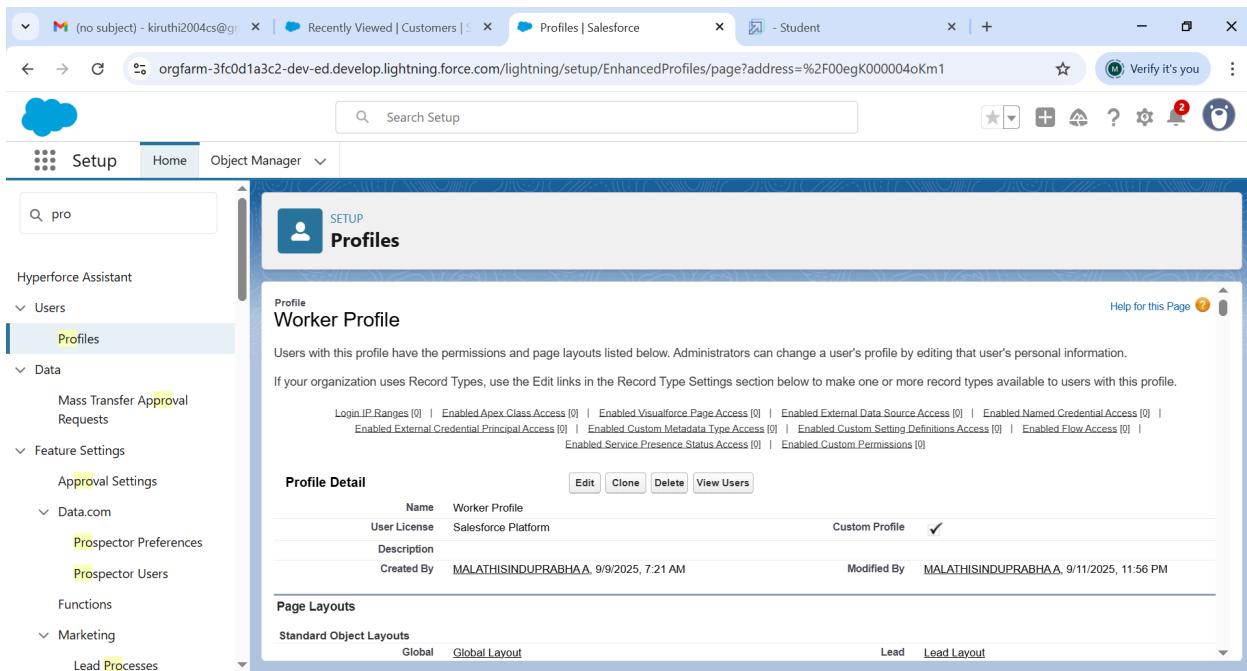
The screenshot shows the Salesforce Profiles page. The sidebar on the left has a search bar and categories for Users and Profiles, with "Profiles" selected. The main content area is titled "Profiles" and shows a "Profile Detail" card for "Gold Smith".

Profile Detail:

- Name:** Gold Smith
- User License:** Salesforce
- Description:** Created By: MALATHISINDUPRABHAA, 9/9/2025, 7:09 AM
- Modified By:** MALATHISINDUPRABHAA, 9/9/2025, 10:44 AM

Page Layouts:

Standard Object Layouts	Global	Global Layout	Location Group Assignment	Location Group Assignment Layout



To Create a Understanding Roles

CRM developers are responsible for translating business needs into technical CRM solutions tailored to an organization's unique requirements. Their primary duties include:

- **Analyzing Business Requirements:** Collaborating with business analysts, sales, and marketing teams to understand organizational needs, data flows, and user interface expectations.
- **Designing CRM Solutions:** Creating detailed design documents encompassing system architecture, data models, UI components, and integration points with other enterprise systems.
- **Developing and Customizing CRM Systems:** Using programming languages such as Java, C#, JavaScript, Apex (Salesforce), and SQL to develop, customize, and enhance CRM platforms like Salesforce, Microsoft Dynamics 365, HubSpot, and Zoho. This includes building custom modules, plugins, workflows, and dashboards.
- **Testing and Quality Assurance:** Conducting thorough testing, including User Acceptance Testing (UAT), to ensure CRM solutions meet business standards and function reliably.
- **Deployment and Maintenance:** Deploying solutions into production, monitoring system performance, troubleshooting issues, applying patches, and updating configurations to keep the CRM system optimized and secure.

- **Data Management and Integration:** Managing data migration, synchronization, and integration of CRM with other business applications such as ERP, marketing automation, customer support tools, ensuring seamless data flow.
- **User Training and Support:** Providing technical support and training to ensure end-users can efficiently operate the CRM system. Creating documentation and simplifying complex features for wider accessibility.

The screenshot shows the Salesforce Setup interface with the 'Roles' page open. The left sidebar navigation includes 'Hyperforce Assistant', 'Users', 'Permission Set Groups', 'Profiles', 'Public Groups', 'Roles' (which is selected), 'Data' (with 'Duplicate Management', 'Mass Transfer Approval Requests'), and 'Email' (with 'Send through External Email Services'). The main content area is titled 'Understanding Roles' and contains a 'Sample Role Hierarchy' diagram. The hierarchy is as follows:

```

graph TD
    ExecutiveStaff[Executive Staff] --> CEO[CEO]
    ExecutiveStaff --> President[President]
    ExecutiveStaff --> CFO[CFO]
    ExecutiveStaff --> VPSales[VP, Sales]
    CEO --> WesternSalesDir[Western Sales Director]
    CEO --> EasternSalesDir[Eastern Sales Director]
    CEO --> InternationalSalesDir[International Sales Director]
    WesternSalesDir --> WesternSalesRep1[Western Sales Rep]
    WesternSalesDir --> WesternSalesRep2[Western Sales Rep]
    EasternSalesDir --> EasternSalesRep1[Eastern Sales Rep]
    EasternSalesDir --> EasternSalesRep2[Eastern Sales Rep]
    InternationalSalesDir --> InternationalSalesRep1[International Sales Rep]
    InternationalSalesDir --> InternationalSalesRep2[International Sales Rep]
  
```

Executive Staff

- CEO
- President
- CFO
- VP, Sales

Western Sales Director

- Director of W. Sales
- Western Sales Rep
- CA Sales Rep
- OR Sales Rep

Eastern Sales Director

- Director of E. Sales
- Eastern Sales Rep
- NY Sales Rep
- MA Sales Rep

International Sales Director

- Director of Int'l Sales
- International Sales Rep
- Asian Sales Rep
- European Sales Rep

Help for this Page

The screenshot shows the Salesforce Setup interface with the title 'Roles' in the top navigation bar. On the left, the 'Setup' sidebar is open, showing categories like Users, Data, and Email. Under 'Users', 'Roles' is selected. The main content area displays a section titled 'Creating the Role Hierarchy'. It shows a tree view of roles under 'SVASC': 'Add Role' (parent), 'CEO' (child), and another 'Add Role' node (child of CEO). There are buttons for 'Edit', 'Del', and 'Assign' next to each role entry.

Users

CRM developers design, develop, customize, and maintain customer relationship management systems that streamline business processes and improve customer engagement across organizations.

The screenshot shows the Salesforce Setup interface with the title 'Users' in the top navigation bar. On the left, the 'Setup' sidebar is open, showing categories like Users, Data, and Service. Under 'Users', 'Users' is selected. The main content area displays a user profile for 'Niklaus Mikaelson'. The 'User Detail' section includes fields for Name (Niklaus Mikaelson), Alias (nmika), Email (nadeem@thesmartbridge.com), Username (niklaus@org.com), Nickname (Nick), Title, Company, Department, Division, Address, Role (Gold Smith), User License (Salesforce), Profile (Gold Smith), Active (checked), Marketing User (unchecked), Offline User (unchecked), Knowledge User (unchecked), Flow User (unchecked), Service Cloud User (unchecked), Site.com Contributor User (unchecked), and Site.com Publisher User (unchecked). A note at the bottom states 'Time 7 hrs / COUNT 17,881 Days/Off/Double/Times/Americas/As/Actual'.

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

- Header:** Welcome to Salesforce: Reset your password, Users | Salesforce, Recently Viewed | Customers, - Student.
- Search Bar:** Search Setup
- Left Navigation:** Setup, Home, Object Manager, Users (selected), Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, Prospector (Users), Service.
- Page Title:** SETUP Users
- User Detail:** Kol Mikaelson
- Fields:**

Name	Kol Mikaelson	Role	Worker
Alias	Kmika	User License	Salesforce Platform
Email	nadeem@thesmartbridge.com [Verify]	Profile	Worker Profile
Username	mikkal@org.com	Active	<input checked="" type="checkbox"/>
Nickname	User17574318530415037169	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT -07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>

Page layouts

Page layouts are the blueprint of any CRM record's interface, controlling the visibility and arrangement of data fields, sections, related lists, and buttons on modules like leads, accounts, deals, or contacts. They help organize information logically and highlight the most pertinent data based on user roles and processes.

The screenshot shows the Salesforce Setup interface for the 'Item' object. The left sidebar is titled 'Object Manager' and lists various setup categories. The main area is titled 'Page Layout for Gold'. It displays a table of fields: Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. The table includes columns for Field Name, Type, and Record Type. A 'Layout Properties' button is at the top right of the table. Below the table is a 'Highlights Panel' section with a placeholder message: 'Customize the highlights panel for this page layout...'. At the bottom is a 'Quick Actions in the Salesforce Classic' section.

This screenshot shows the same Salesforce Setup interface as the first one, but for the 'Item' object's 'Page Layout for Silver' configuration. The layout structure and field definitions are identical to the 'Gold' layout, including the table of fields and the 'Highlights Panel' section.

Record Type

A CRM (Customer Relationship Management) Developer is responsible for customizing, developing, and maintaining CRM systems to support business processes such as sales, marketing, and customer service. One of the key tasks often involves creating flows or automation workflows that streamline operations within the CRM platforms.

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

- Page Header:** Welcome to Salesforce: Reset y | Recently Viewed | Customers | Item | Salesforce
- Page Title:** Item - Student
- Section:** SETUP > OBJECT MANAGER
- Object:** Item
- Record Type:** Gold
- Record Type Details:**
 - Record Type Label: Gold
 - Record Type Name: Master
 - Namespace Prefix:
 - Description: Gold items information
 - Created By: MALATHISINDUPRABHA 9/9/2025, 9:16 AM
 - Modified By: MALATHISINDUPRABHA 9/9/2025, 9:16 AM
 - Status: Active (checked)
- Sidebar:** Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types (selected), Related Lookup Filters.
- Table:** Picklists Available for Editing
 - Action: Edit
 - Field: Expected Days Of Return
 - Modified Date: 9/9/2025, 9:16 AM

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The main page displays the 'Item' record type, which is identified as 'Silver'. The left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types (which is currently selected), and Related Lookup Filters.

Record Type
Silver
« Back to Custom Object: Item

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

Edit

Record Type Label	Silver	Active	✓
Record Type Name	Silver		
Namespace Prefix			
Description	Silver items information	Created By	MALATHISINDUPRABHAA, 9/9/2025, 9:18 AM
		Modified By	MALATHISINDUPRABHAA, 9/9/2025, 9:18 AM

Picklists Available for Editing

Action	Field	Modified Date
Edit	Expected Days Of Return	9/9/2025, 9:18 AM

Apex Class

Create an Paid Amount

The screenshot shows the Salesforce Developer Console with the file 'UpdatePaidAmountTriggerHandlers.apxc' open. The code implements a static void method named 'handleBeforeUpdate' that processes a map of Billing__c objects. It iterates through the updatedBillings list, retrieves the old Billing__c object from the oldBillingsMap, and calculates the new Paid_Amount__c value by adding the old Paid_Amount__c and the Paying_Amount__c.

```
14 public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap, List<Billing__c> updatedBillings) {  
15  
16     for (Billing__c billing : updatedBillings) {  
17         Billing__c oldBilling = oldBillingsMap.get(billing.Id);  
18  
19         Decimal oldPaidAmount = oldBilling.Paid_Amount__c;  
20  
21         billing.Paid_Amount__c = oldPaidAmount + billing.Paying_Amount__c;  
22     }  
23 }  
24 }
```

The developer console also includes tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. A log table at the bottom shows a single entry for a User operation with status Read and size 0.

The screenshot shows the Salesforce Developer Console interface. The top navigation bar includes tabs for 'Welcome to Salesforce', 'Recently Viewed | Custom', 'Home | Salesforce', 'Developer Console', and a workspace titled '- Student'. Below the navigation is a toolbar with standard file operations like File, Edit, Debug, Test, and Workspace. The main area displays the code for 'UpdatePaidAmountTriggerHandlers.apxc'.

```
1 public class UpdatePaidAmountTriggerHandlers {
2     public static void handleBeforeInsert(List<Billing__c> newBillings) {
3         for (Billing__c billing : newBillings) {
4             billing.Paid_Amount__c = billing.Paying_Amount__c;
5         }
6     }
7 }
8
9
10 }
```

The code is a trigger handler for the Billing__c object. It contains a static method 'handleBeforeInsert' that loops through a list of new Billing records and sets the 'Paid_Amount__c' field to the value of the 'Paying_Amount__c' field. The API version is set to 64.

Below the code editor is a log viewer tab labeled 'Logs' which is currently selected. The log table has columns for User, Application, Operation, Time, Status, Read, and Size. A 'Filter' button and a placeholder 'Click here to filter the log list' are at the bottom of the log viewer.

Apex Trigger

Create a Trigger Paid Amount

The screenshot shows the Salesforce Developer Console interface. The top navigation bar includes tabs for Welcome to Salesforce, Recently Viewed | Custom, Billing | Salesforce, Developer Console, and Student. The main area displays the code for `UpdatePaidAmountTrigger.apxc`. The code is a trigger for the `Billing__c` object, handling insert and update events. It uses the `UpdatePaidAmountTriggerHandler` class to handle the logic. The API version is set to 64. Below the code editor, there are tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The Problems tab is selected, showing a table with columns for Name, Line, and Problem. The table is currently empty.

```
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);  
    }  
}
```

Create a User Adoption

The screenshot shows the Salesforce Setup Home page. The top navigation bar includes tabs for Welcome to Salesforce, Recently Viewed | Custom, Home | Salesforce, Developer Console, and Student. The main area features a search bar labeled "Search Setup" and a "Setup" button. On the left, there is an "App Launcher" with a search input field containing "jew". The search results show several items: "dAmountTrigger" (Apex Trigger, Object: Billing), "dAmountTriggerHandlers" (Apex Class), "JINDUPRABHA A" (User), "Console" (Debug Level), "Jewel Customers" (Record Type, Item), "View All" (Record Type, Item), "Page Layout for Silver" (Page Layout, Item), "Page Layout for Gold" (Page Layout, Item), "Niklaus Mikaelson" (User), and "Kol Mikaelson" (User). The "Setup" tab is selected in the top navigation bar.

M (no subject) - kiruthi2004cs@gmail.com Item with Billing | Jewel Customer Profiles | Salesforce - Student Verify it's you

orgfarm-3fc0d1a3c2-dev-ed.develop.lightning.force.com/lightning/r/Jewel_Customer_c/a03gK00000A2c3UQAR/view

Jewellery Inventory ... Customers Items Jewel Customers Orders Reports Customer Orders Billings Prices

Item with Billing

New Contact Edit New Opportunity

Related	Details
Customer name	Item with Billing
City	Hyderabad
Phone	09701489372
Email	kiruthi2004cs@gmail.com
State	Tamil nadu
Street	Tirupur
Country	India
Owner	 MALATHISINDUPRABHA A

M (no subject) - kiruthi2004cs@gmail.com Sample | Jewel Customer | Sales Profiles | Salesforce - Student Verify it's you

orgfarm-3fc0d1a3c2-dev-ed.develop.lightning.force.com/lightning/r/Jewel_Customer_c/a03gK00000A2gS1QAJ/view

Jewellery Inventory ... Customers Items Jewel Customers Orders Reports Customer Orders Billings Prices

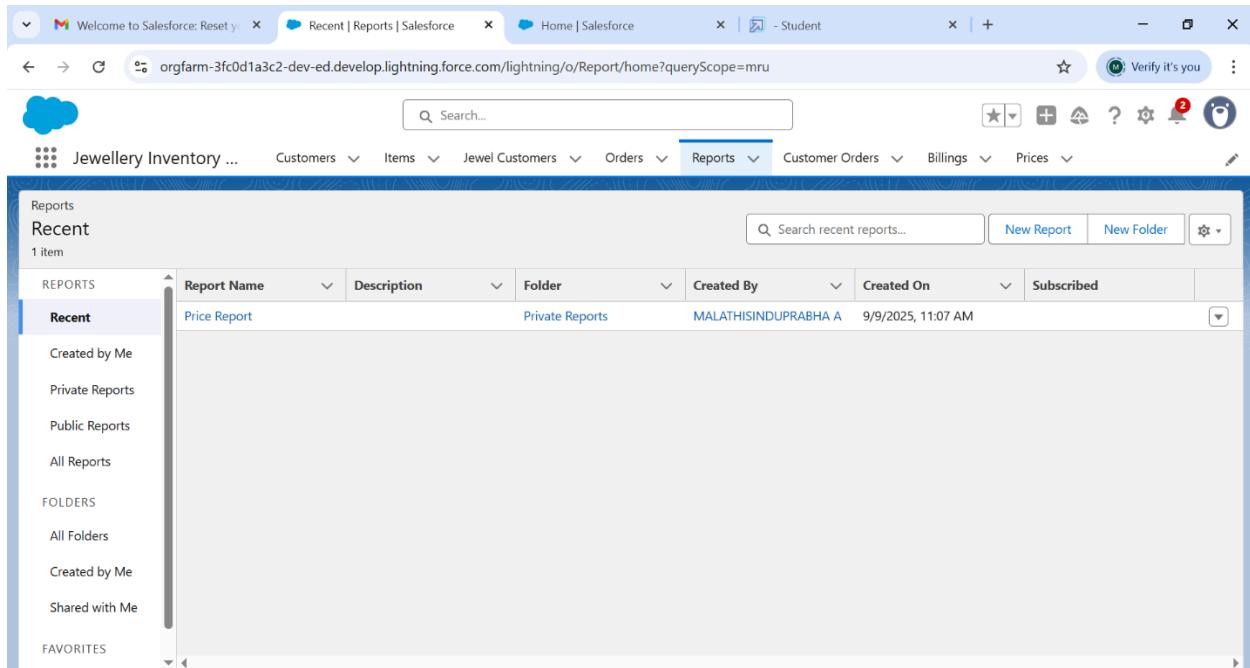
Sample

New Contact Edit New Opportunity

Related	Details
Customer name	Sample
City	Hyderabad
Phone	09701489372
Email	kiruthi2004cs@gmail.com
State	Tamil nadu
Street	Tirupur
Country	India
Owner	 MALATHISINDUPRABHA A

Reports

CRM reports collect data automatically from all interactions logged in the CRM system — including leads, deals, customer contacts, emails, calls, and transactions. This data is analyzed and generated into structured reports, often customizable by the user. Some CRM platforms also offer real-time updates and AI-powered insights to enhance forecasting and decision-making.

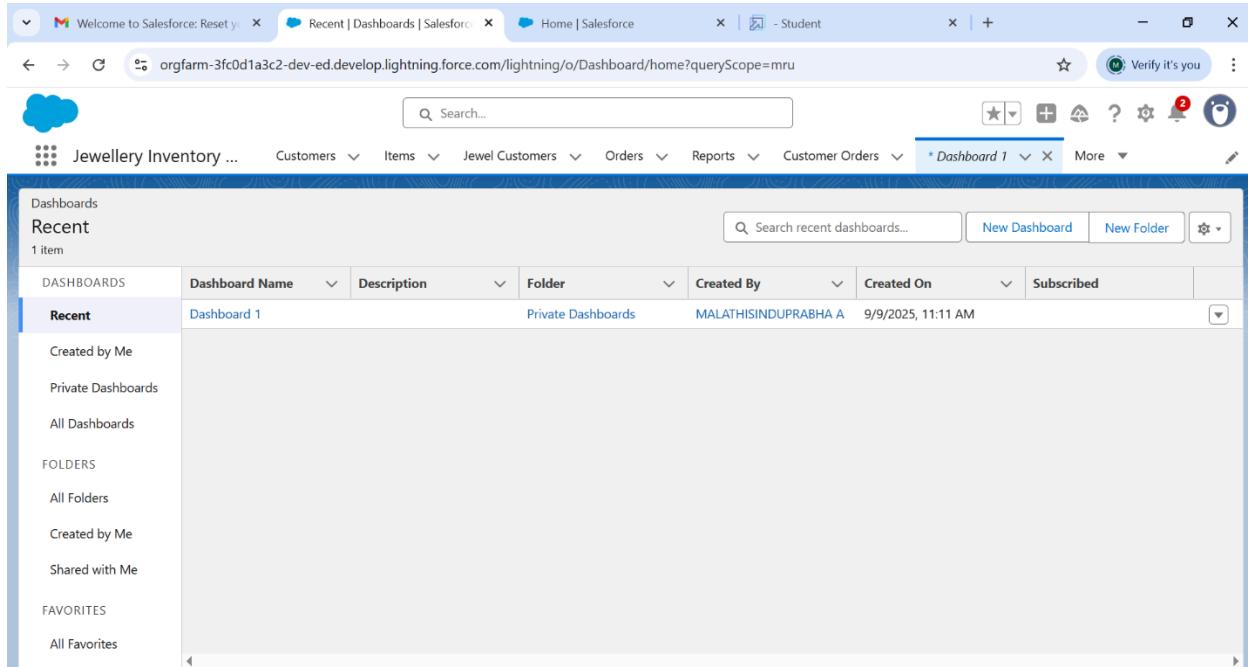


The screenshot shows the Salesforce Reports interface. At the top, there are tabs for 'Recent' and 'Reports'. Below the tabs, a search bar says 'Search...'. On the right, there are buttons for 'New Report' and 'New Folder'. The main area displays a table with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. One row is visible: 'Price Report' under 'Private Reports' was created by 'MALATHISINDUPRABHA A' on '9/9/2025, 11:07 AM'. To the left of the table, a sidebar lists categories: 'RECENT', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', and 'FAVORITES'.

Dashboard

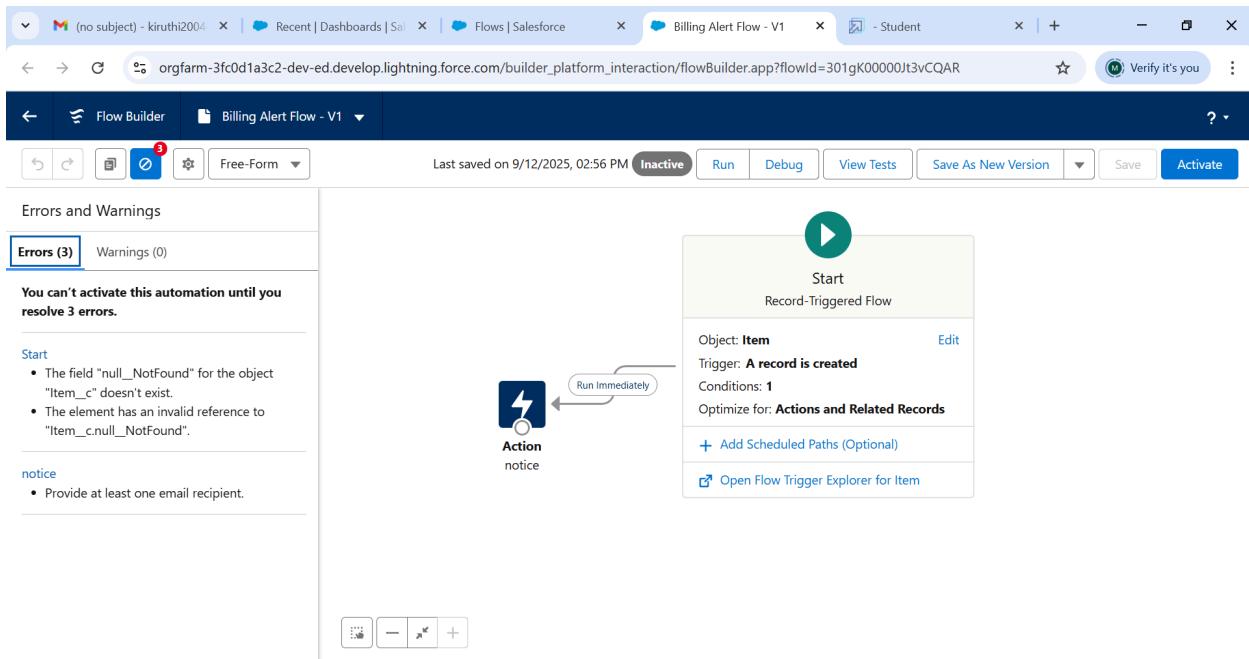
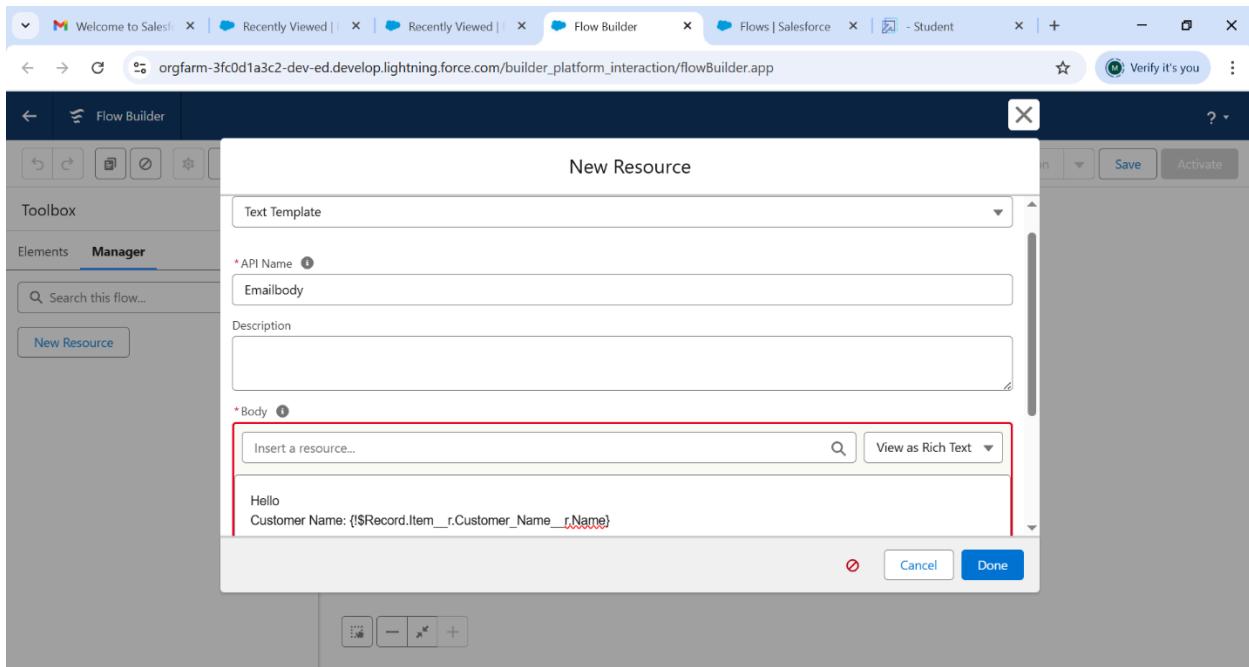
A CRM (Customer Relationship Management) dashboard provides real-time insights and visualizations tailored for different business units to enhance efficiency and decision-making. When developing a CRM

dashboard that serves sales, marketing, and customer service teams, it is essential to design role-specific features while maintaining a unified data platform.



To Create a Flows

A CRM (Customer Relationship Management) Developer is responsible for customizing, developing, and maintaining CRM systems to support business processes such as sales, marketing, and customer service. One of the key tasks often involves creating flows or automation workflows that streamline operation within the CRM platform.



THANK YOU