CRM APPLICATION FOR JEWEL MANAGEMENT

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College Code: BRUBD

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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

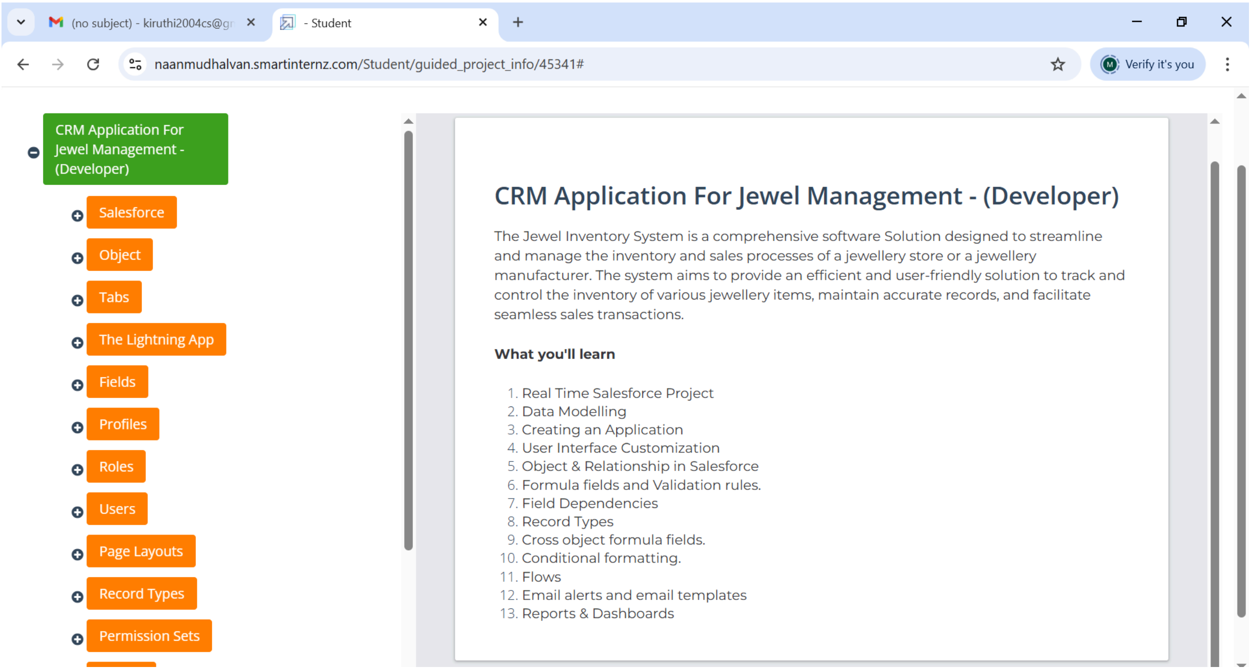
Jewelry CRM software simplifies and improves several critical aspects of business operations:

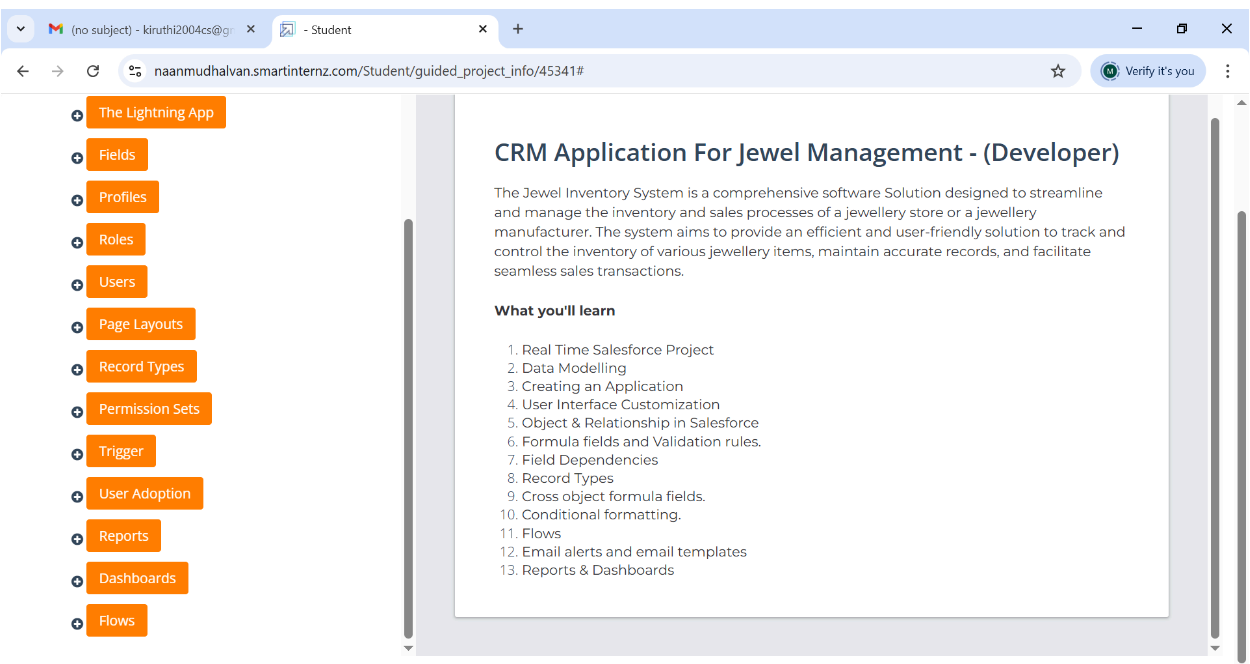
- **Customer Data Management:** Centralizes and securely stores customer details, purchase histories, preferences (such as ring sizes, metal allergies), and important dates like birthdays and anniversaries.
- **Personalized Customer Engagement:** Enables targeted communication through automated emails 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.





DEVELOPMENT PHASE:

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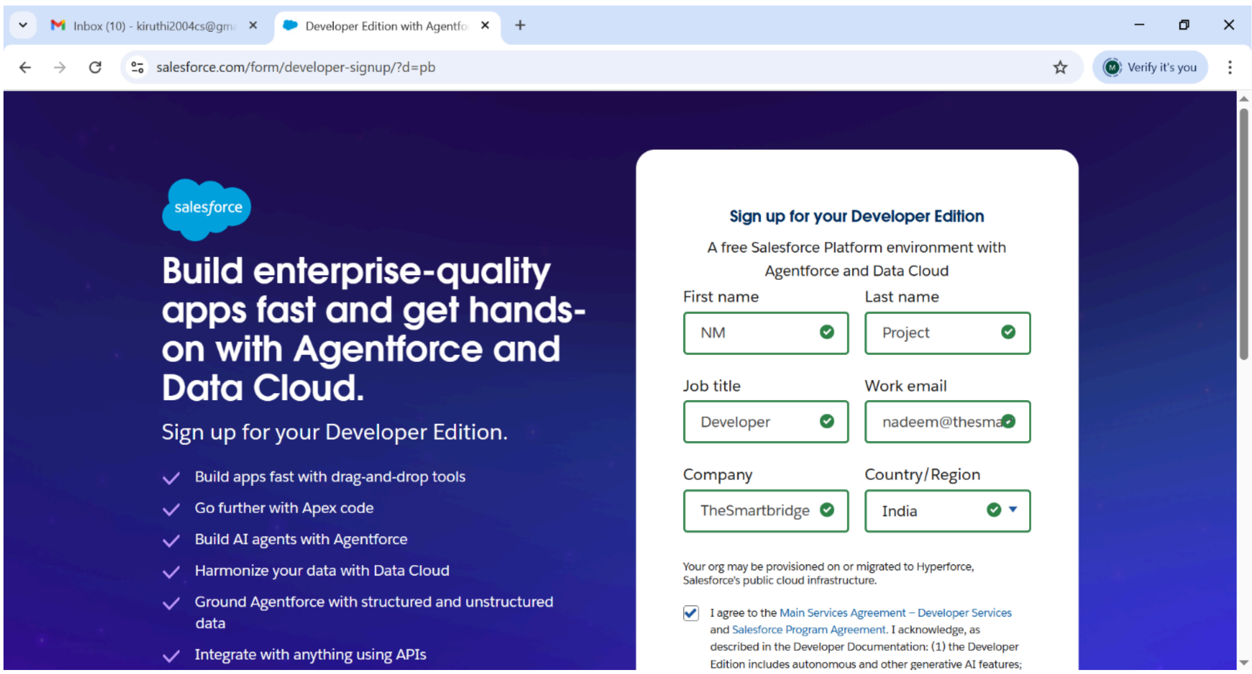

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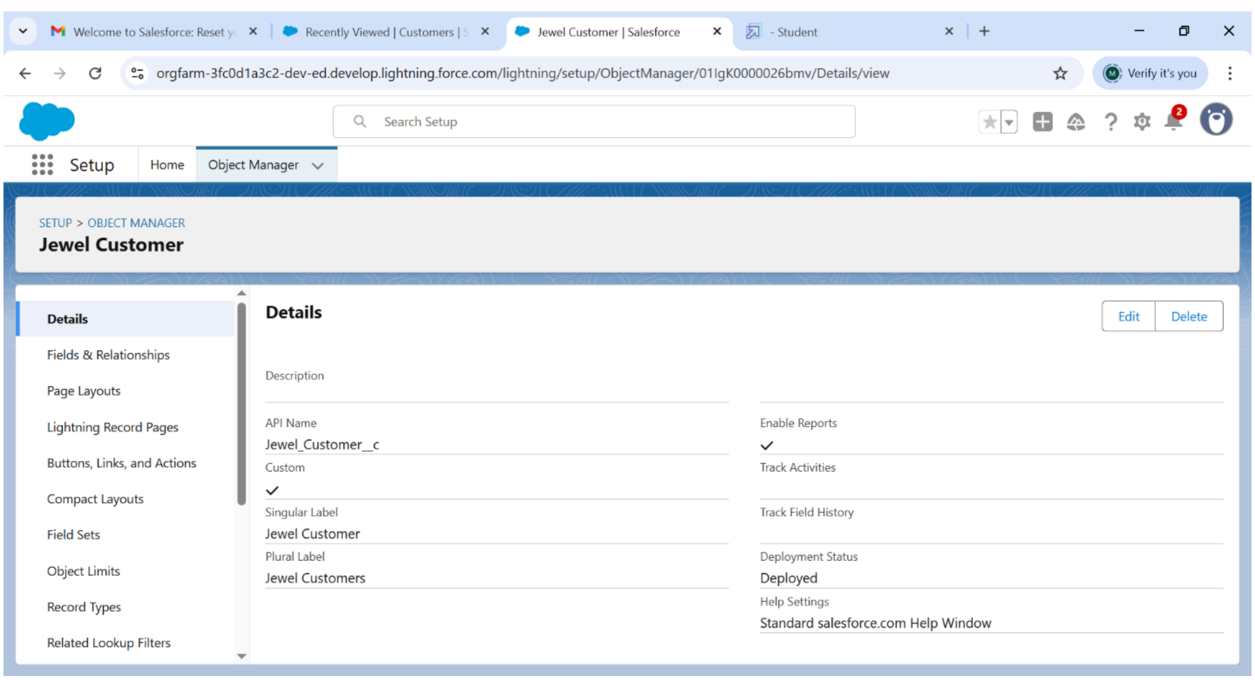
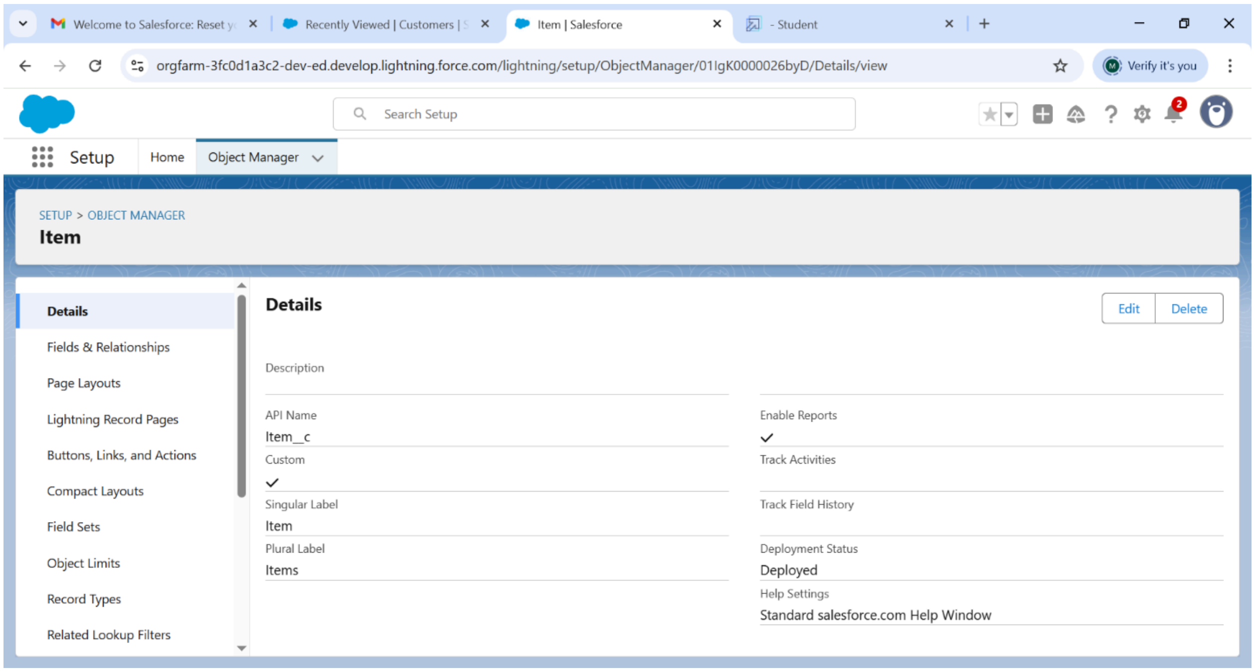




Tabs

1. Customer Orders / Order Management

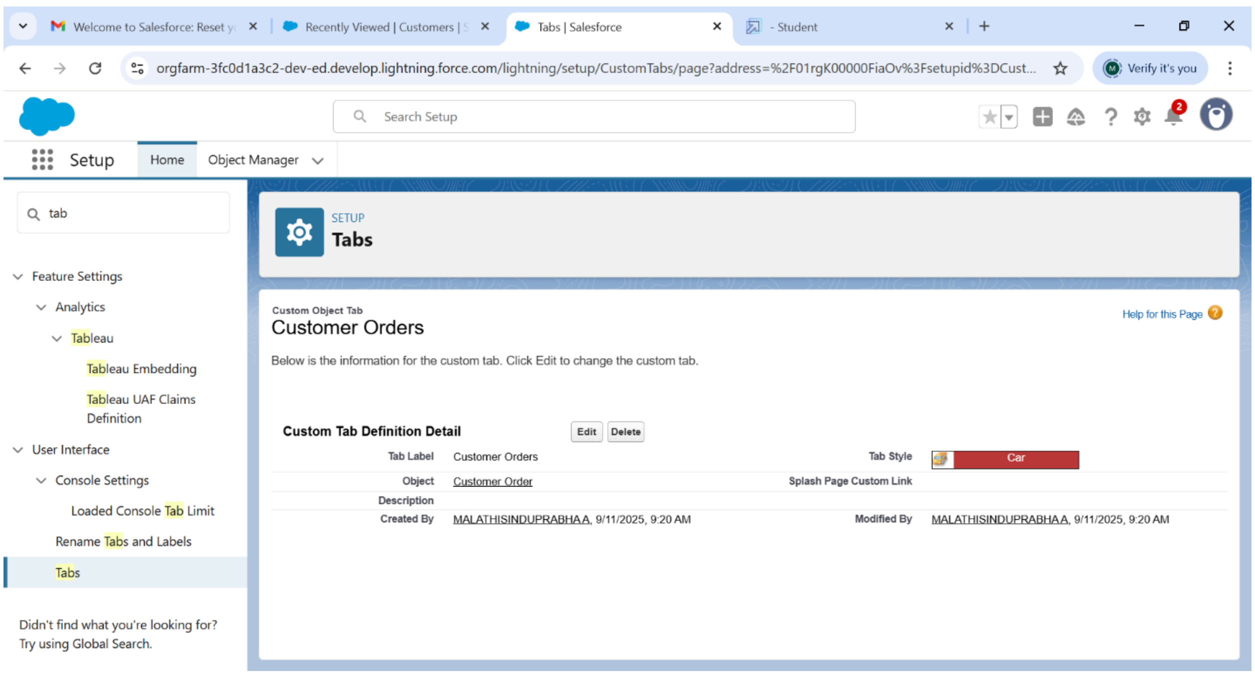
    - This tab manages the entire lifecycle of a customer's order — from order placement, tracking custom designs or repairs, status updates, to completion.
    - It includes capturing order details, order history, special customization requests, shipping information, and repair tracking.

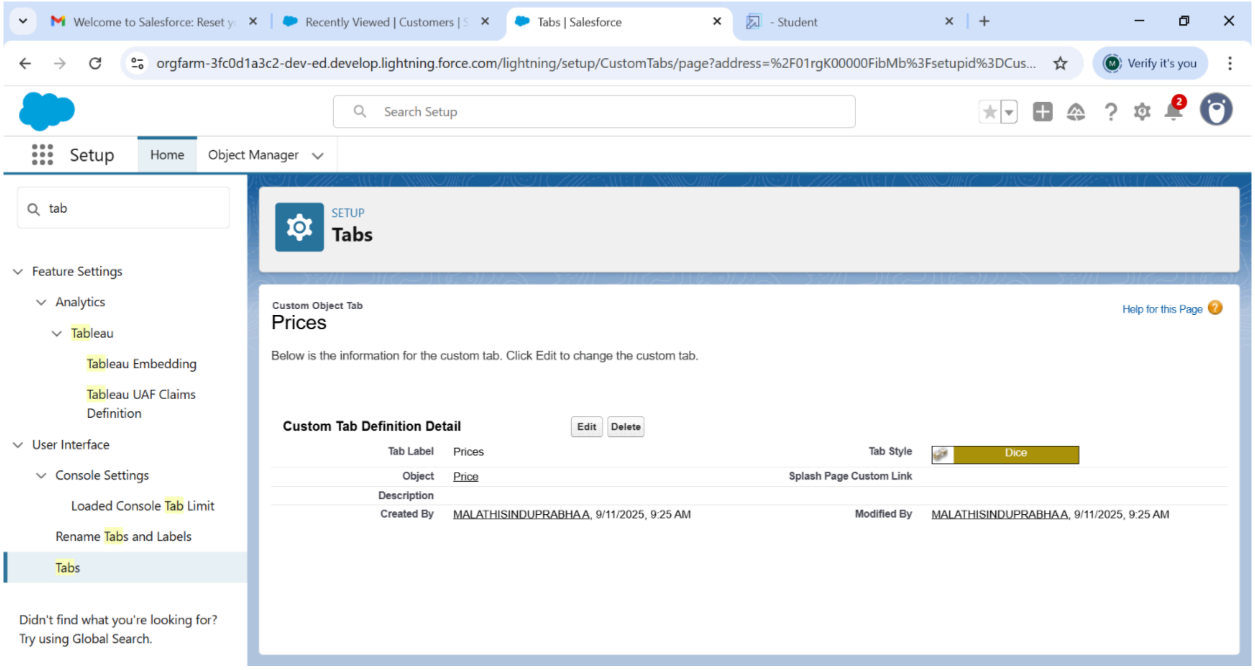
2. Billing / Invoicing

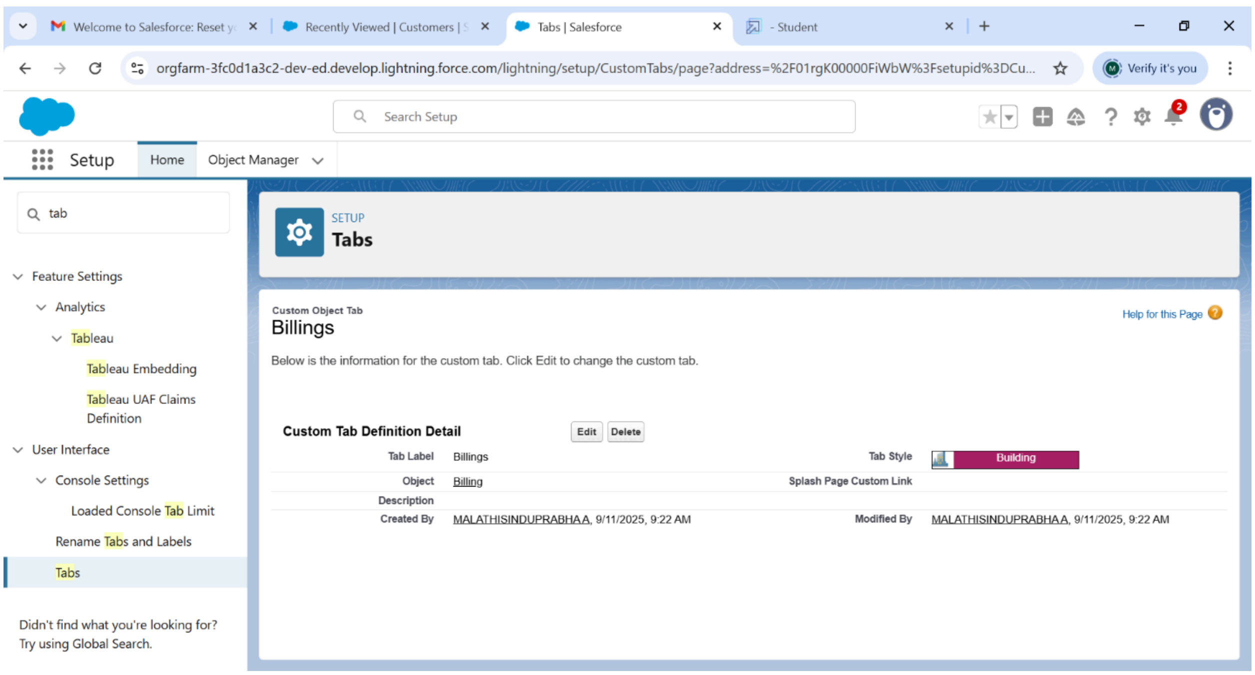
    - A dedicated tab for generating, processing, and tracking customer invoices and payments.
    - It supports billing automation including layaway plan management, installment tracking, and sending payment reminders for outstanding balances.

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.

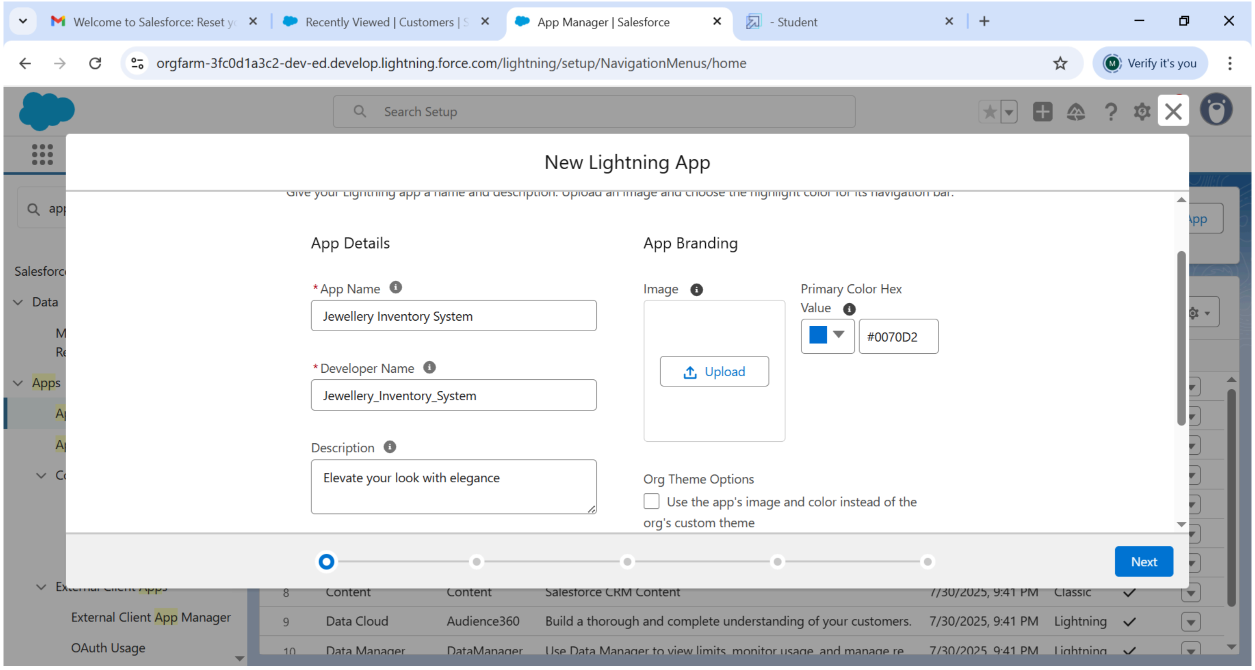






To Create a Lighting App

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.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OAuth Usage
Data Cloud
Audience360
Build a thorough and complete understanding of your customers.
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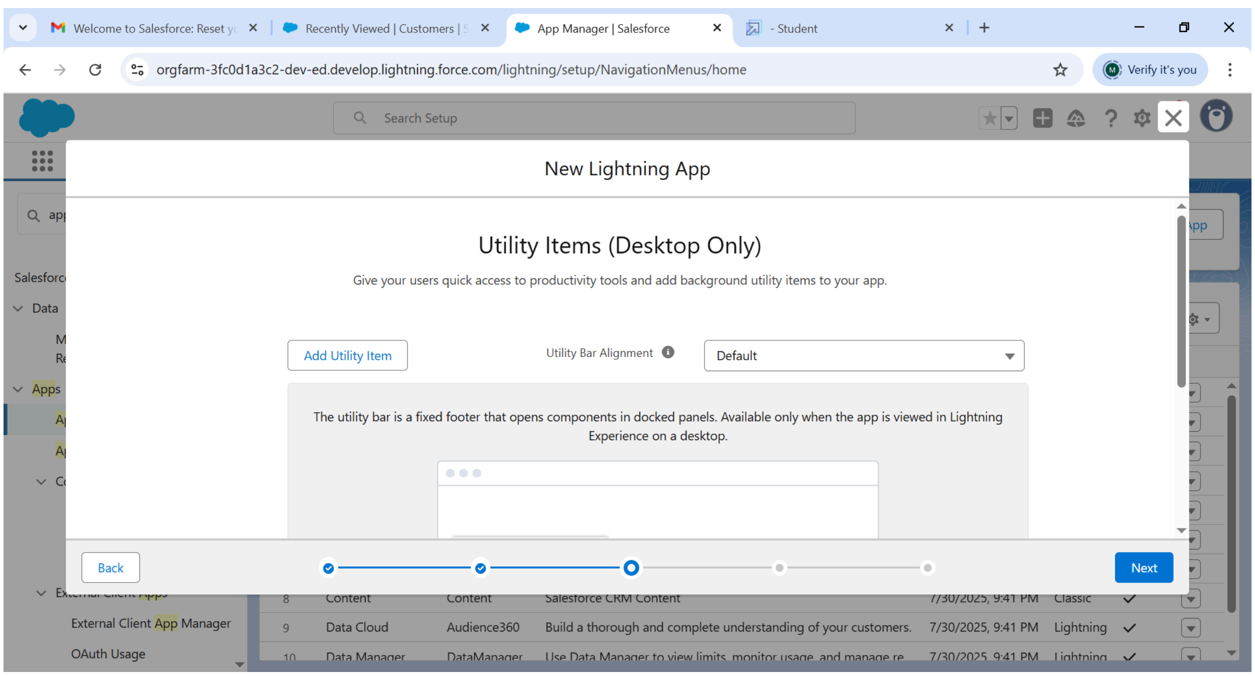
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Give your users quick access to productivity tools and add background utility items to your app.
Add Utility Item
Utility Bar Alignment
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The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.
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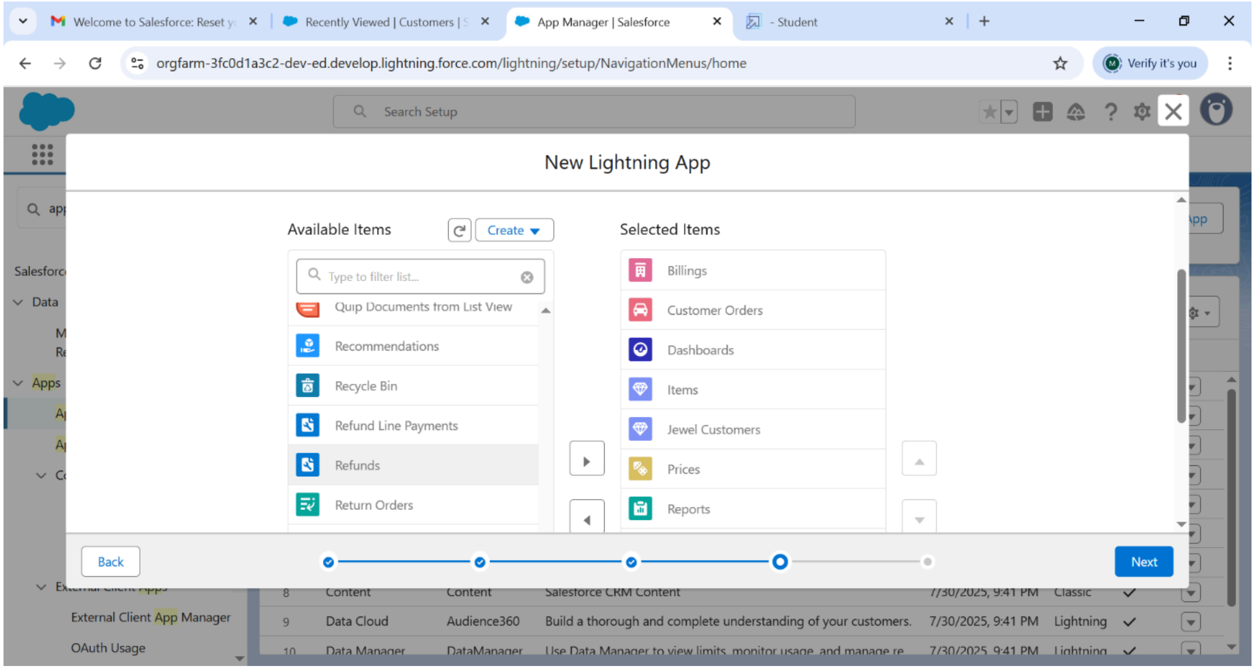
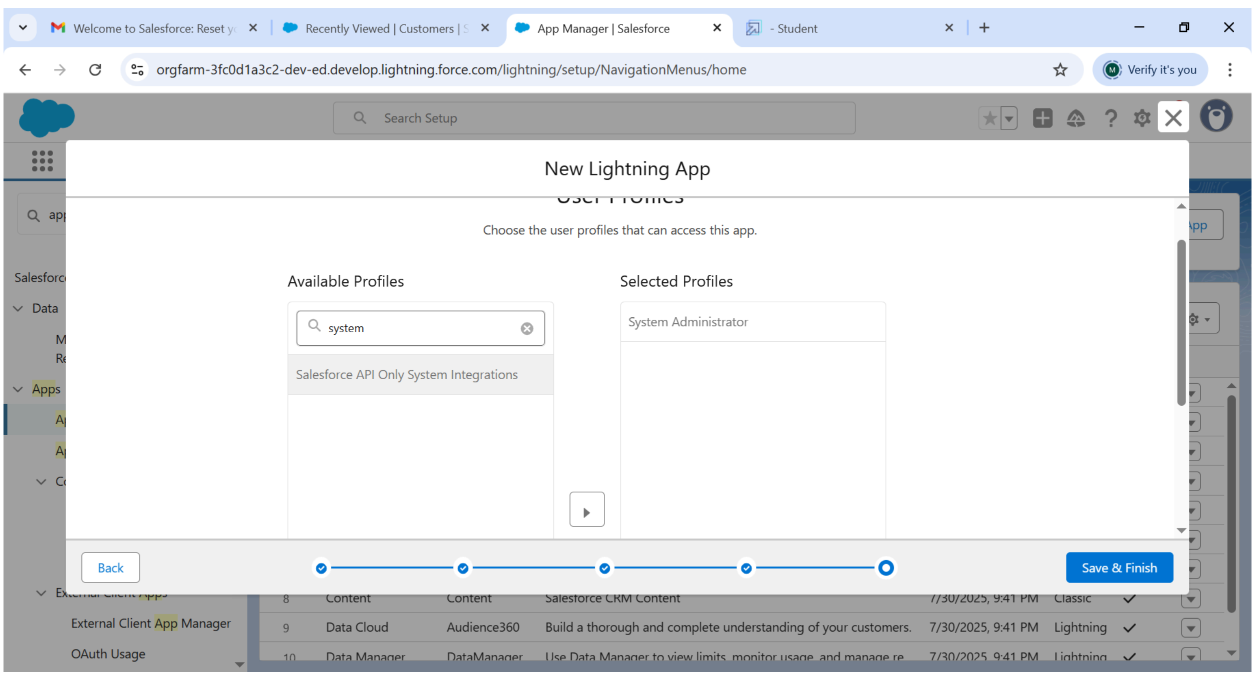




To Create a Fields

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.

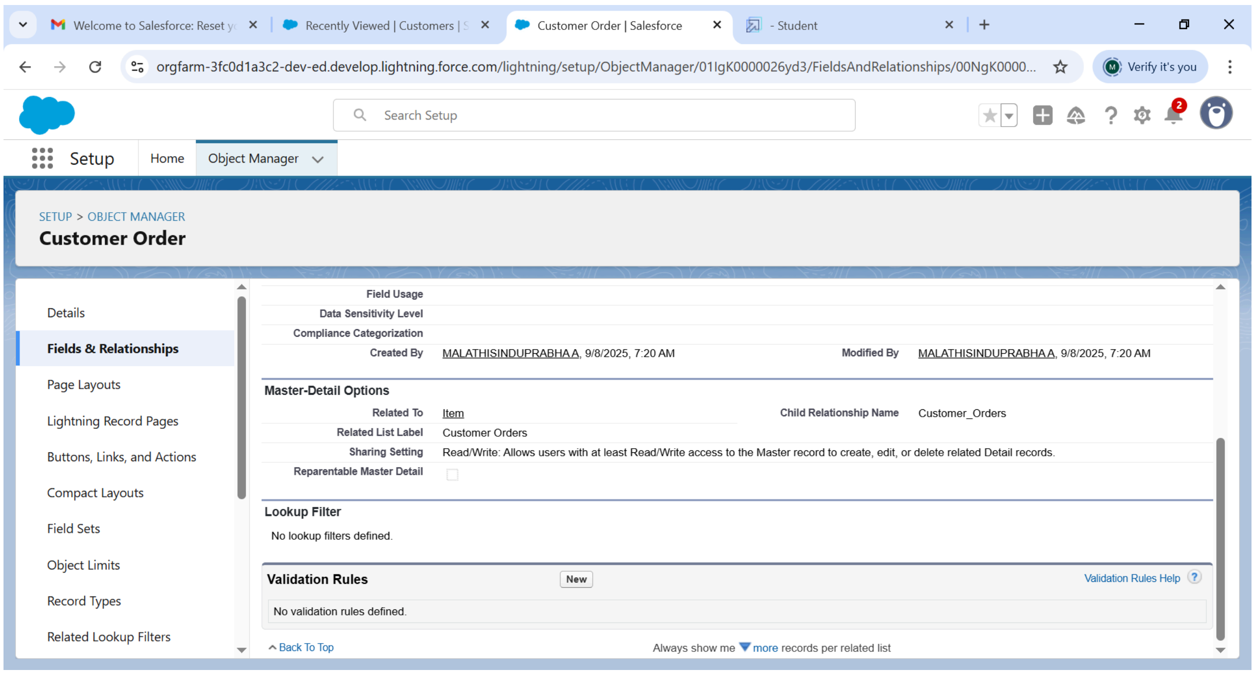
5. Case Object Fields **(For Support & Service)**

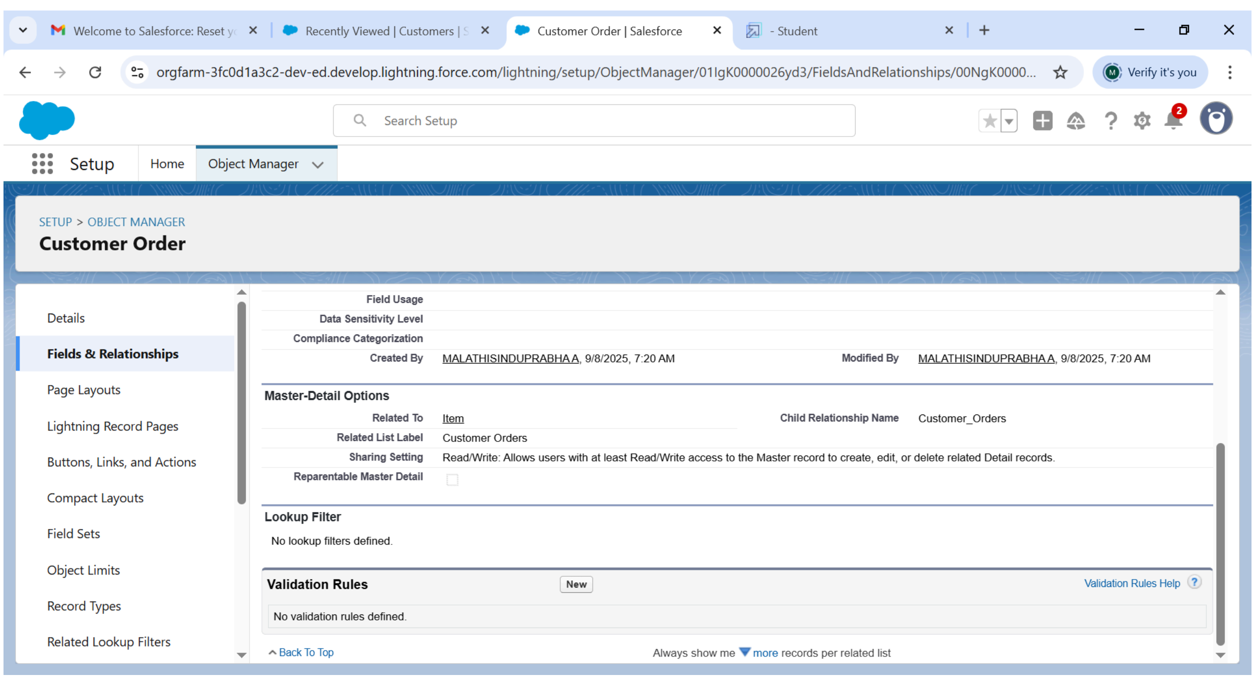
- **Case Number** (CaseNumber): Unique identifier.
- **Subject** (Subject): Brief description of issue.
- **Status** (Status): Current case state (New, Working, Closed).
- **Priority** (Priority): Case urgency.
- **ContactId** and **AccountId**: Links to the affected contact and account.

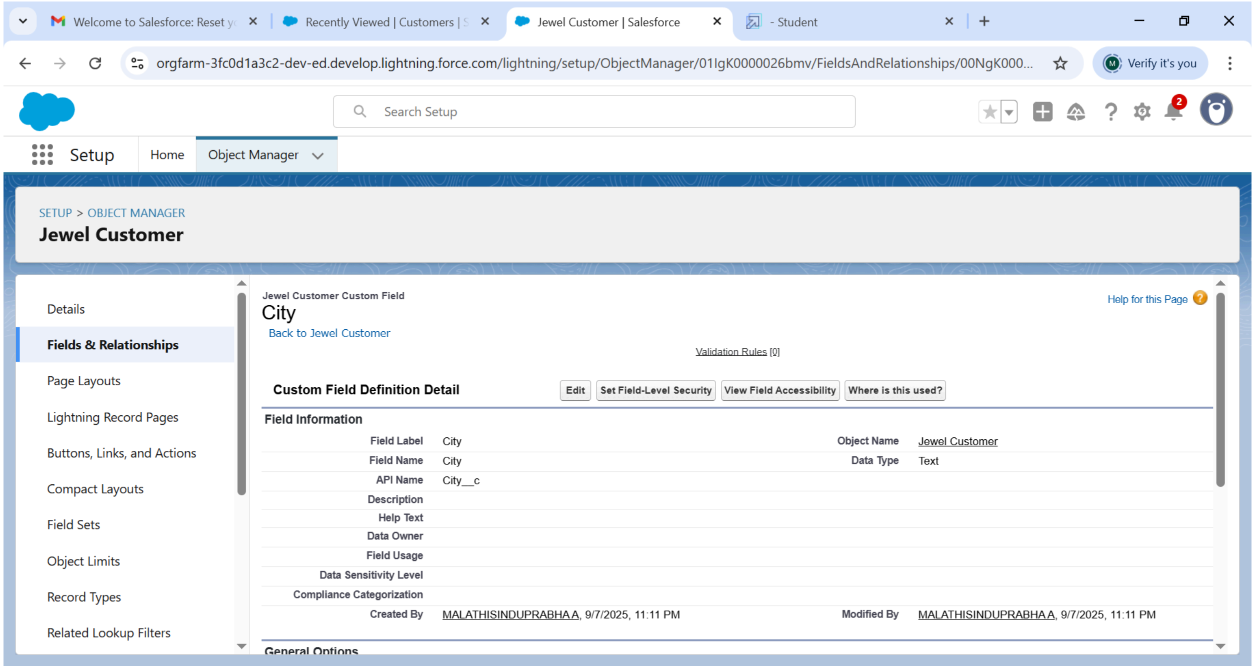
Lightning-Specific Considerations

- **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.







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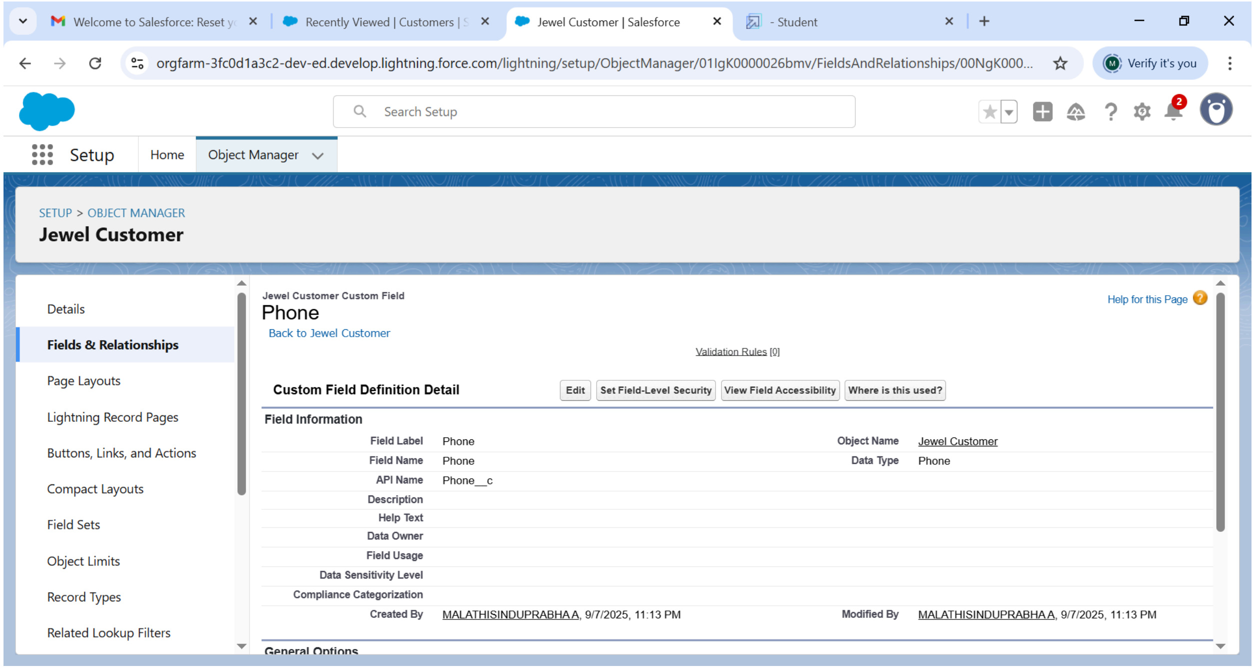
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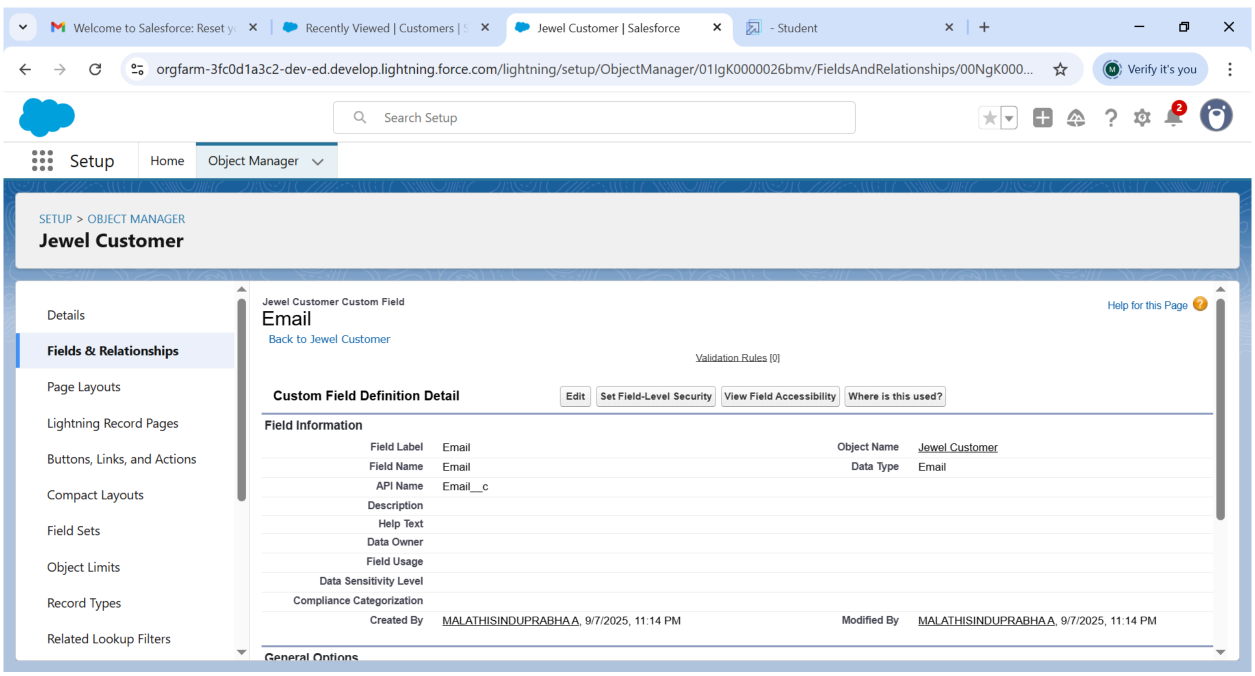
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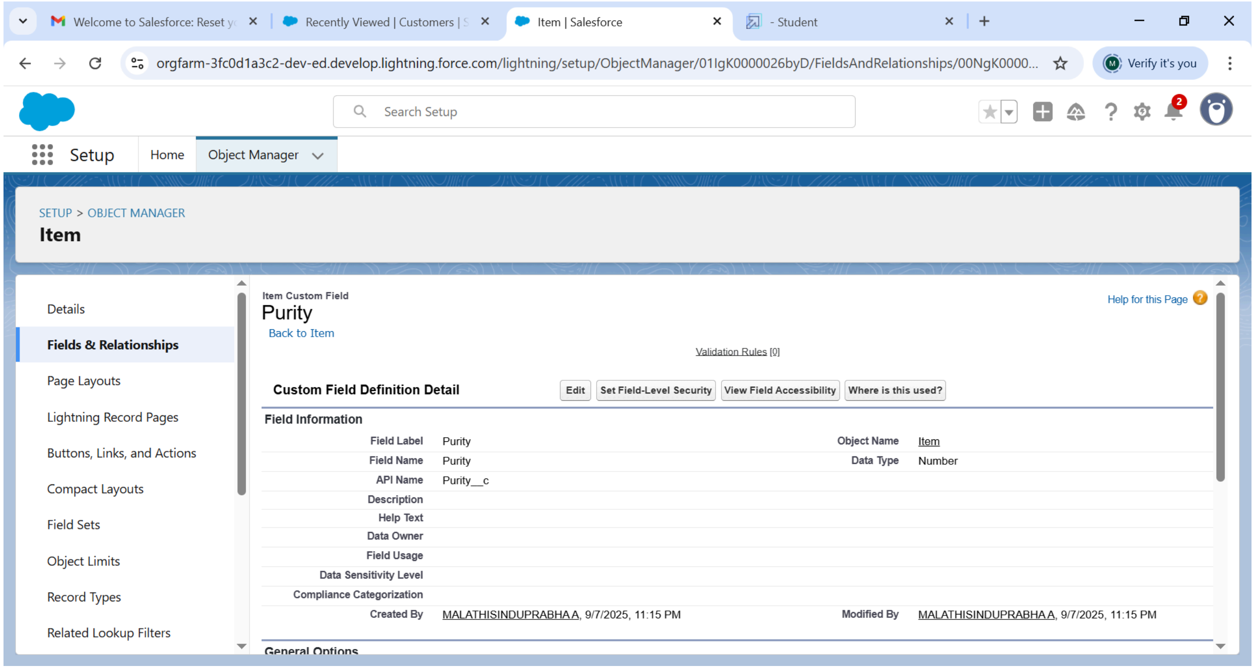
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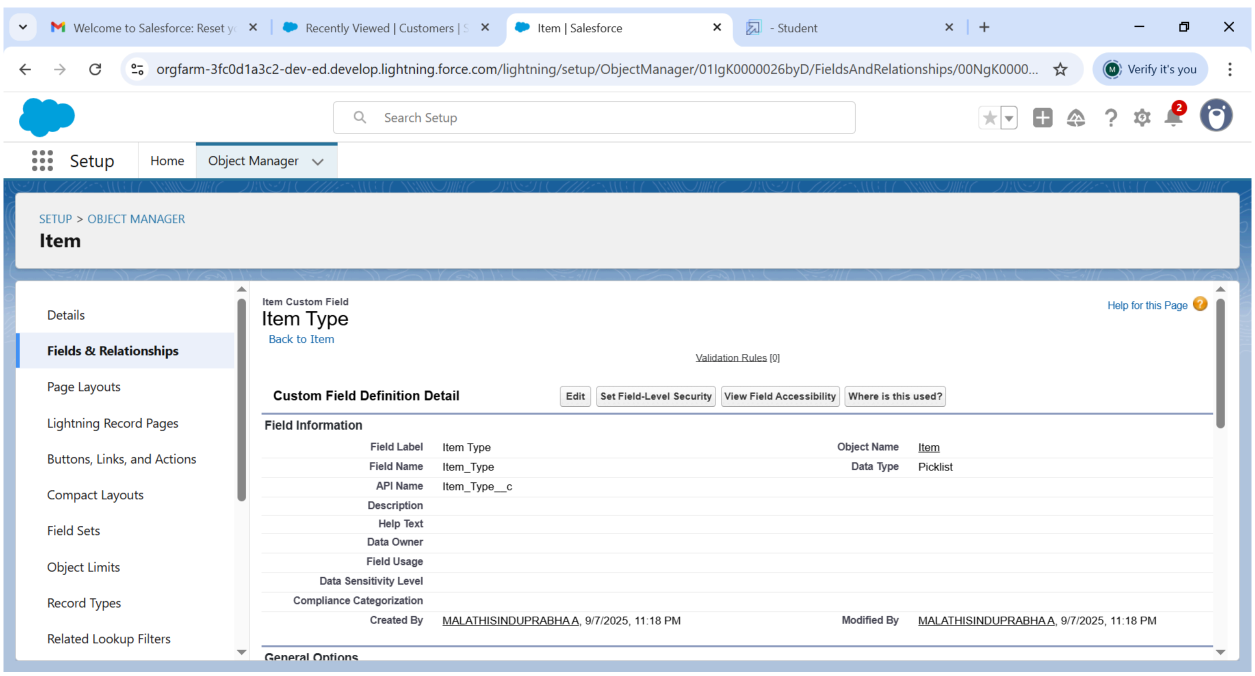
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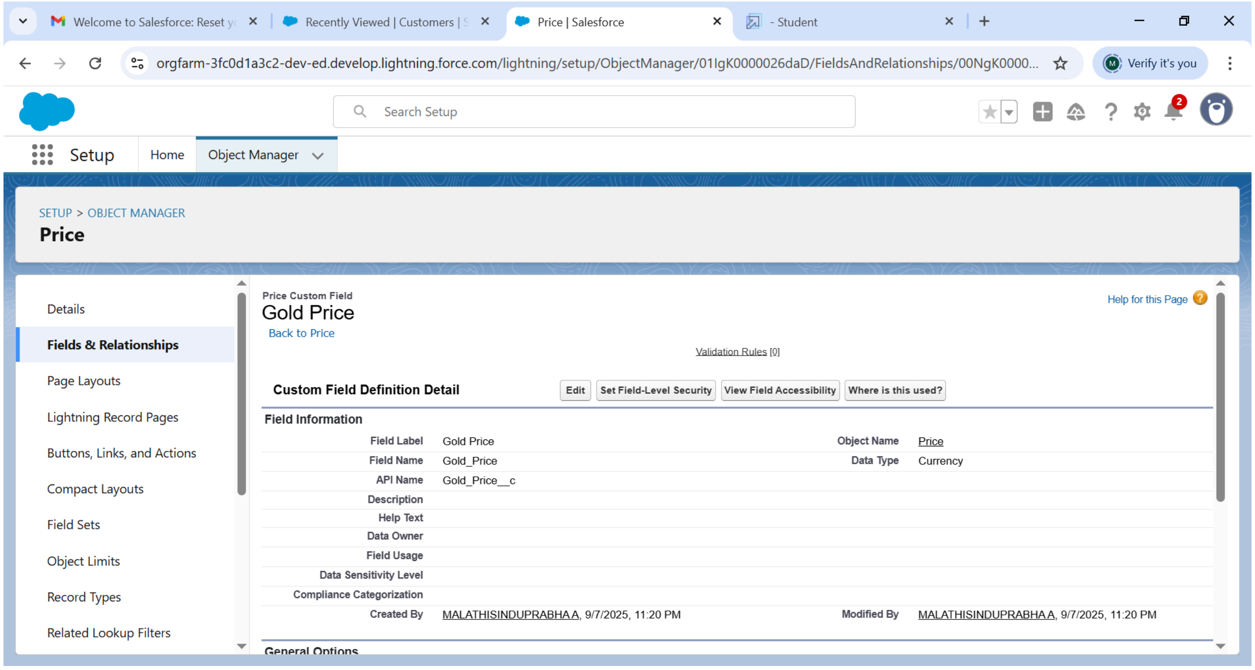
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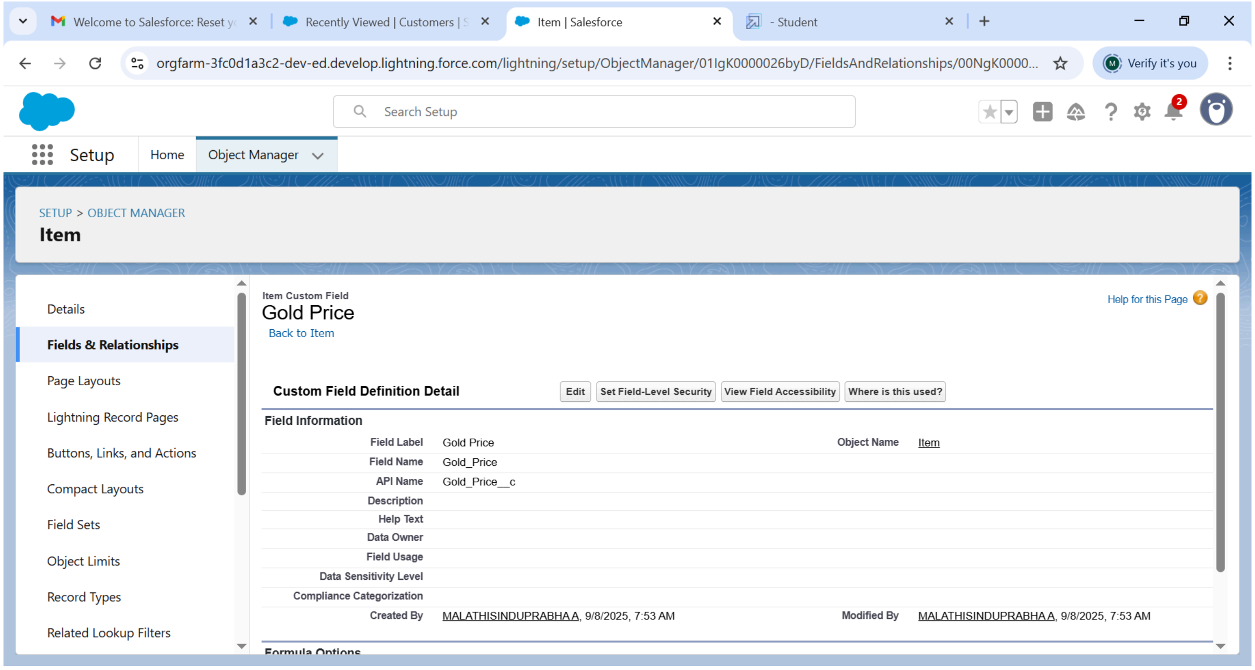
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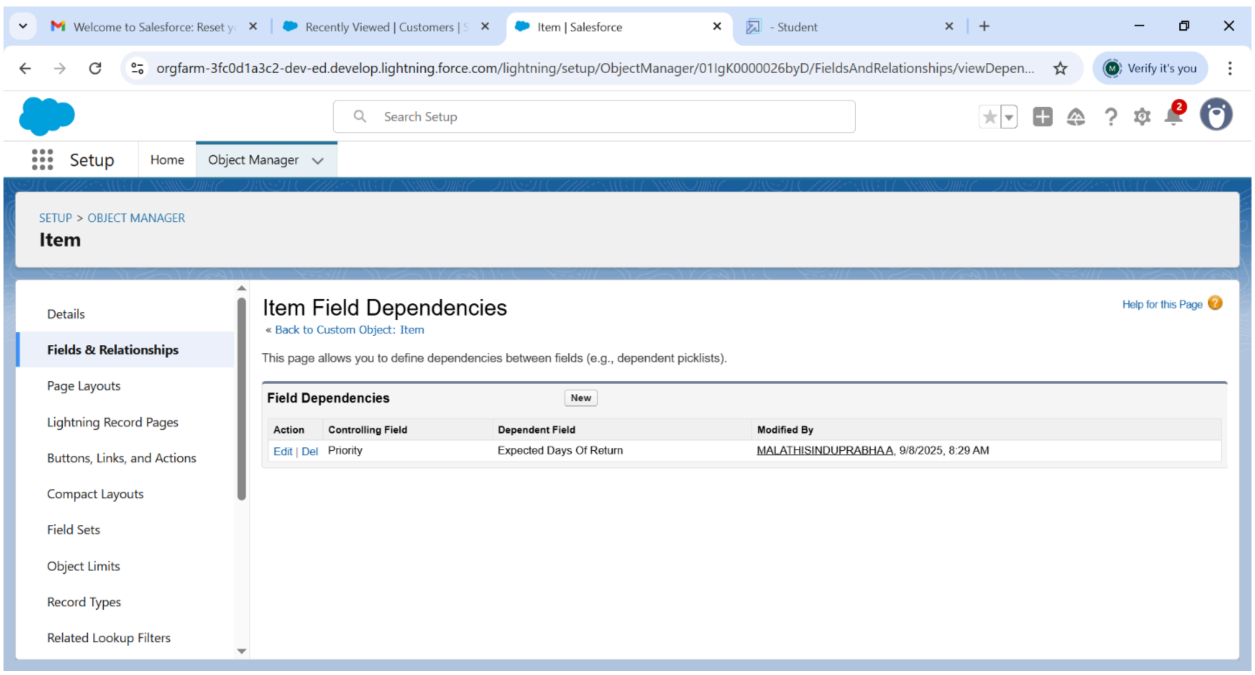
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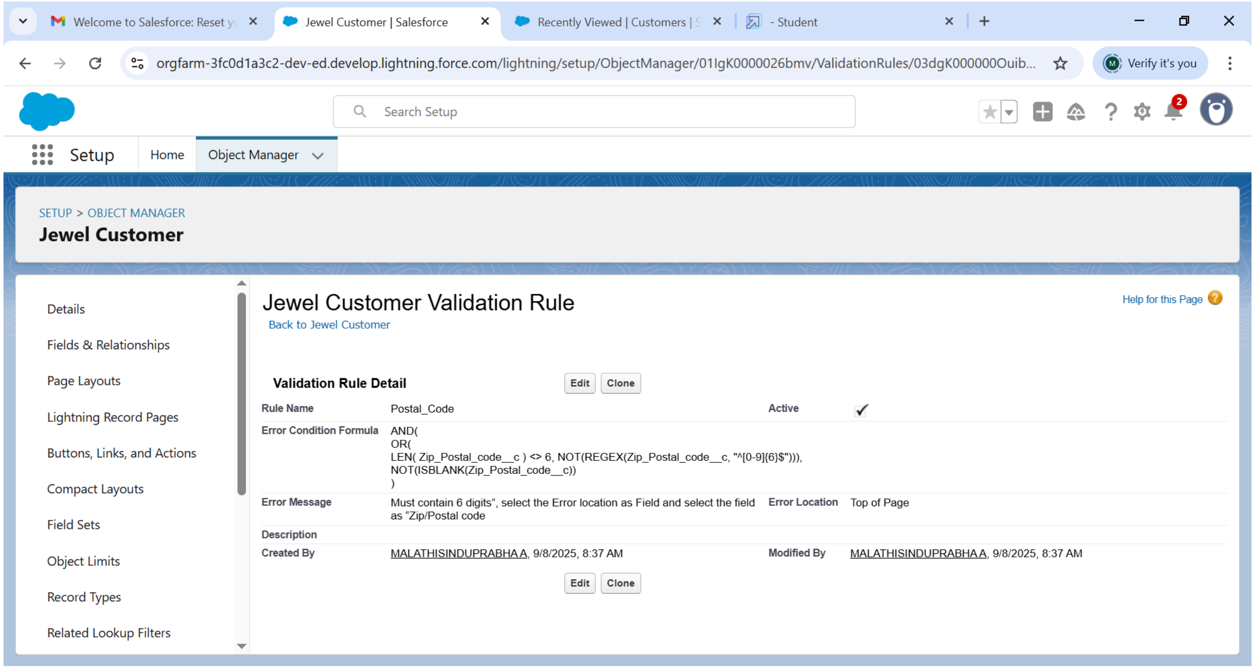

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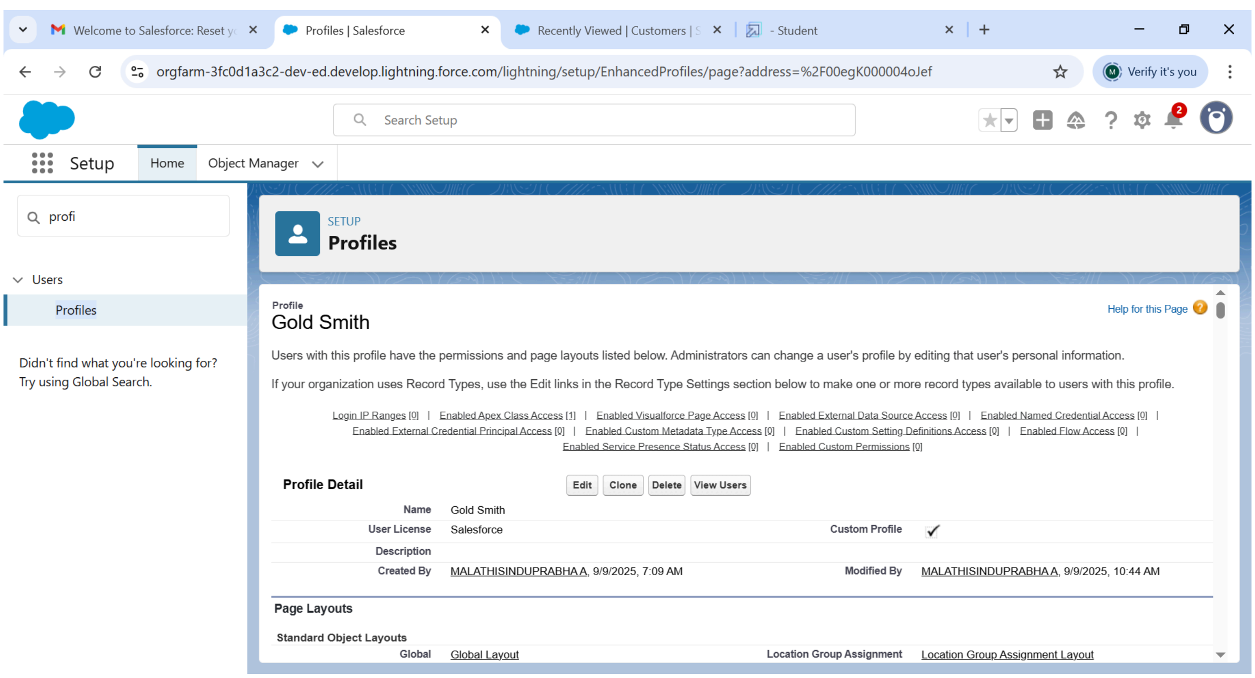
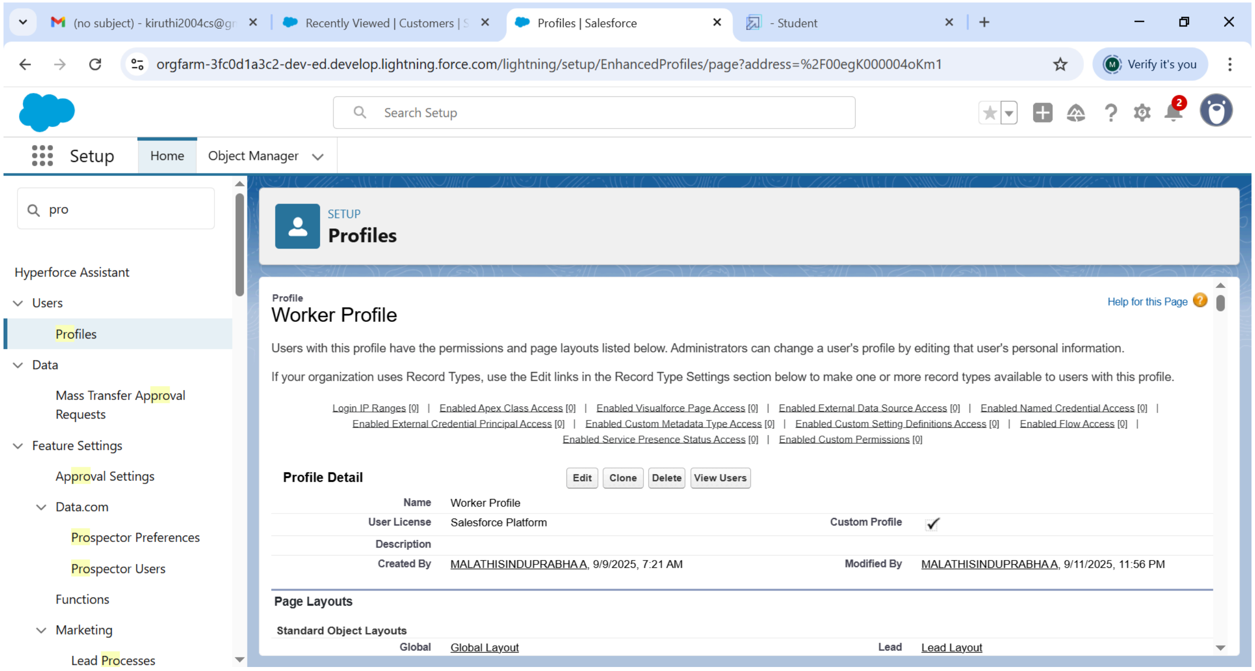


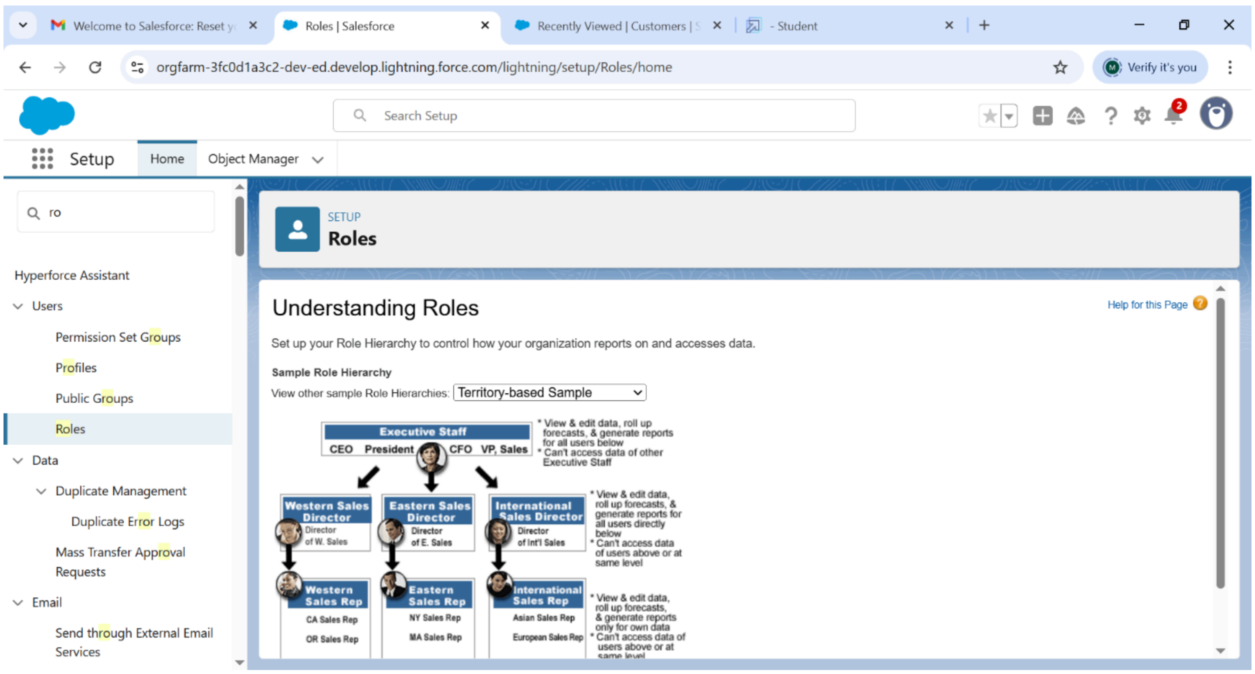


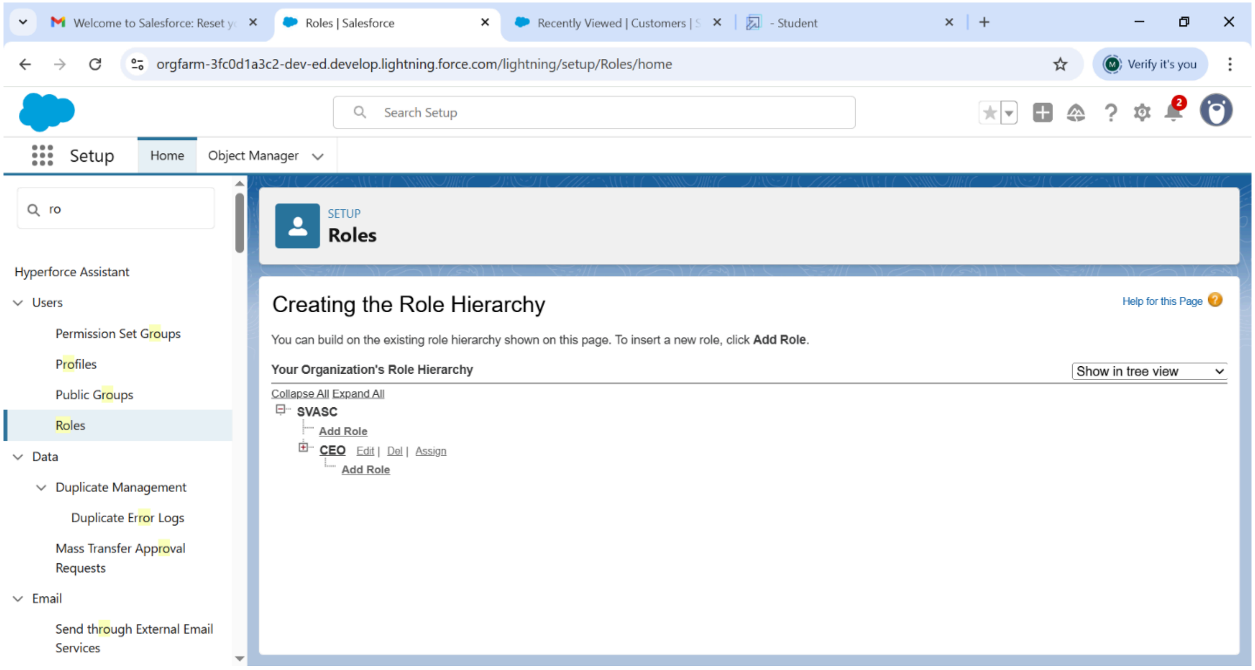
To Create a Understanding Roles

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.

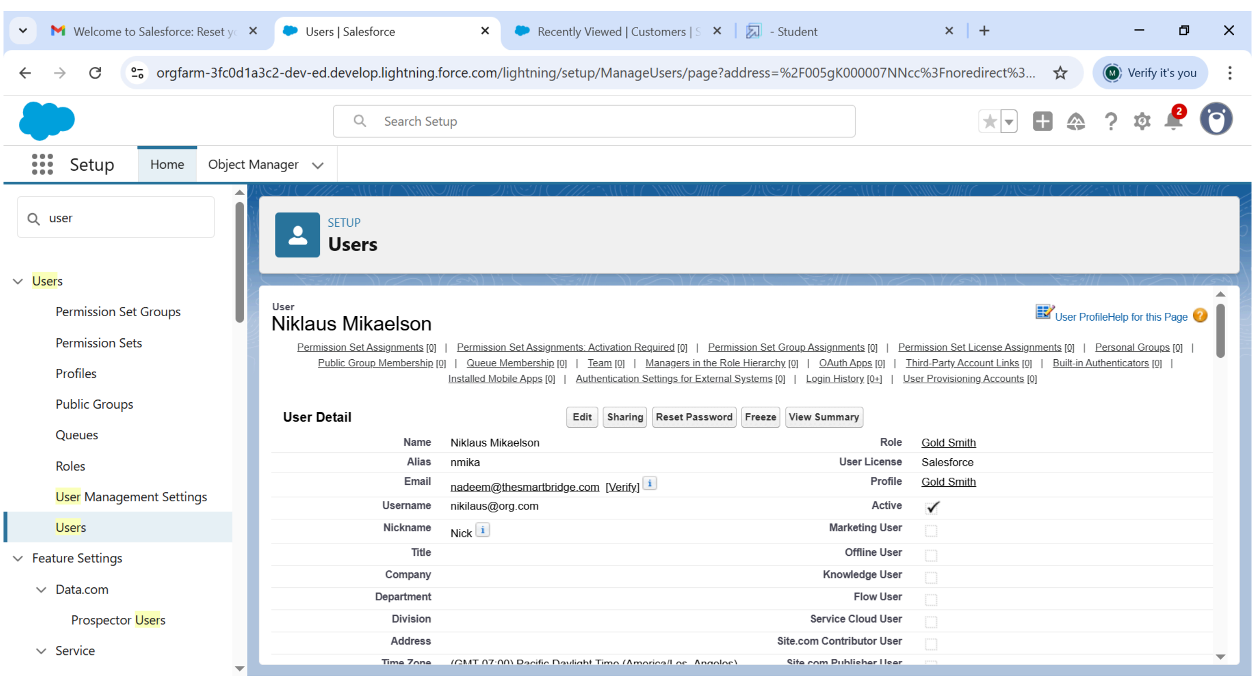
- **Data Management and Integration:** Managing data migration, synchronization, and integration of CRM with other business applications such as ERP, marketing automation, customer support tools, ensuring seamless data flow.
- **User Training and Support:** Providing technical support and training to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

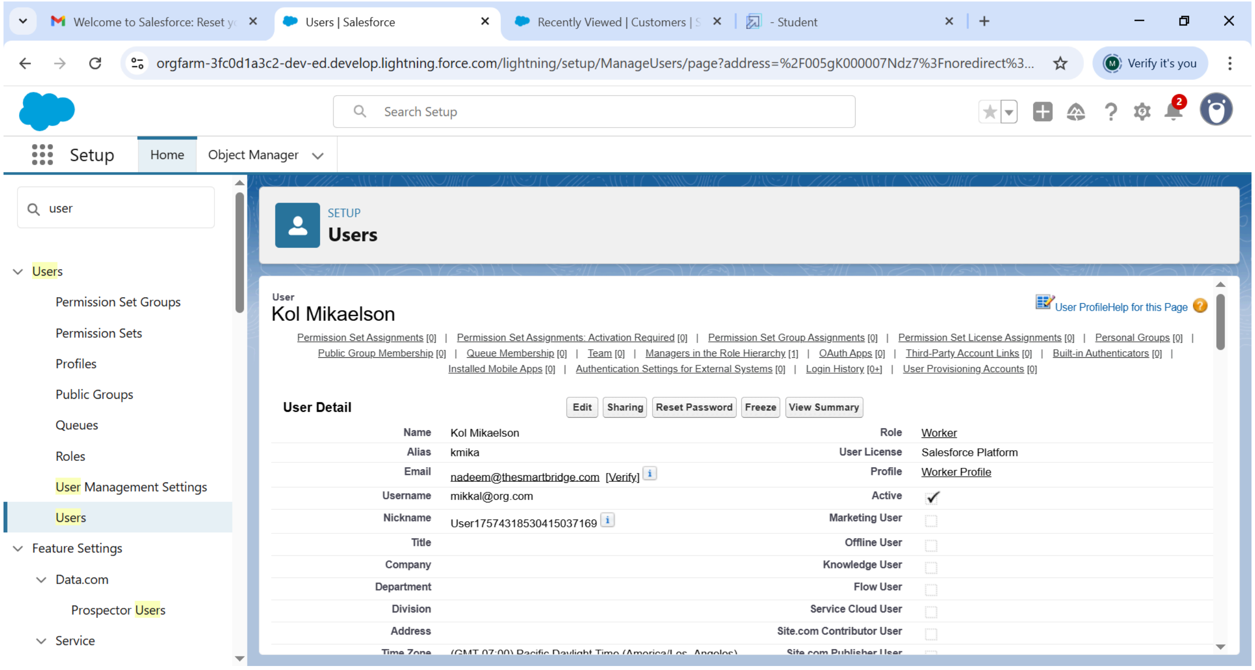




Users

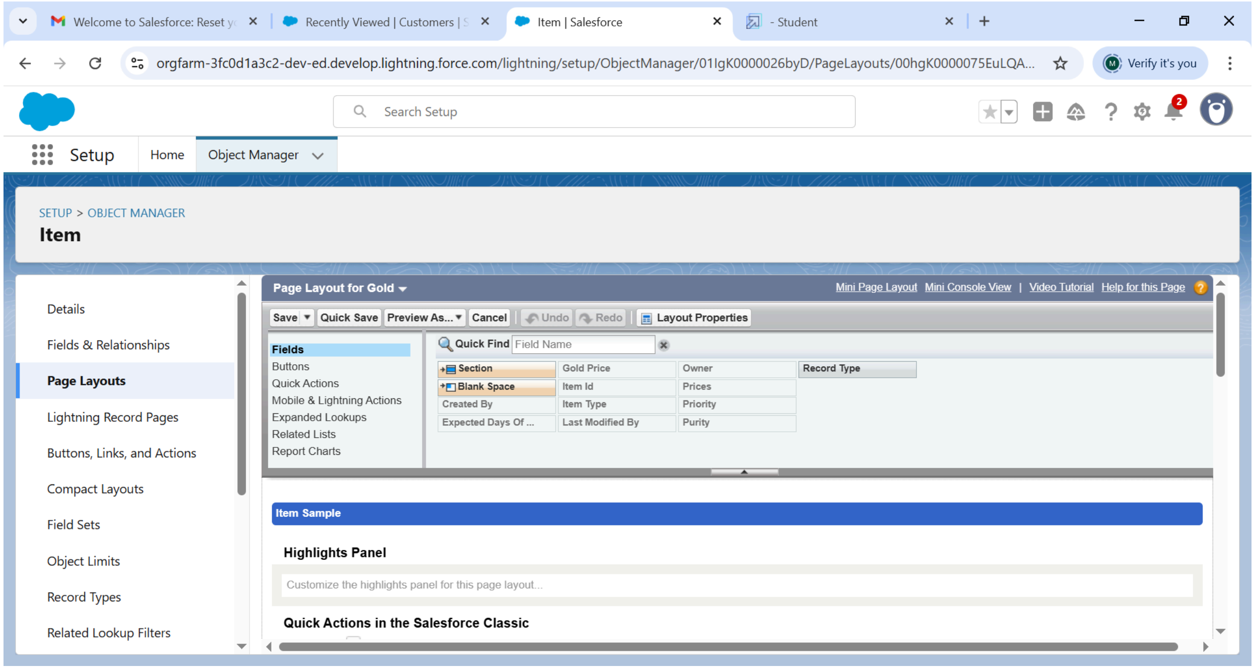
CRM developers design, develop, customize, and maintain customer relationship management systems that streamline business processes and improve customer engagement across organizations.

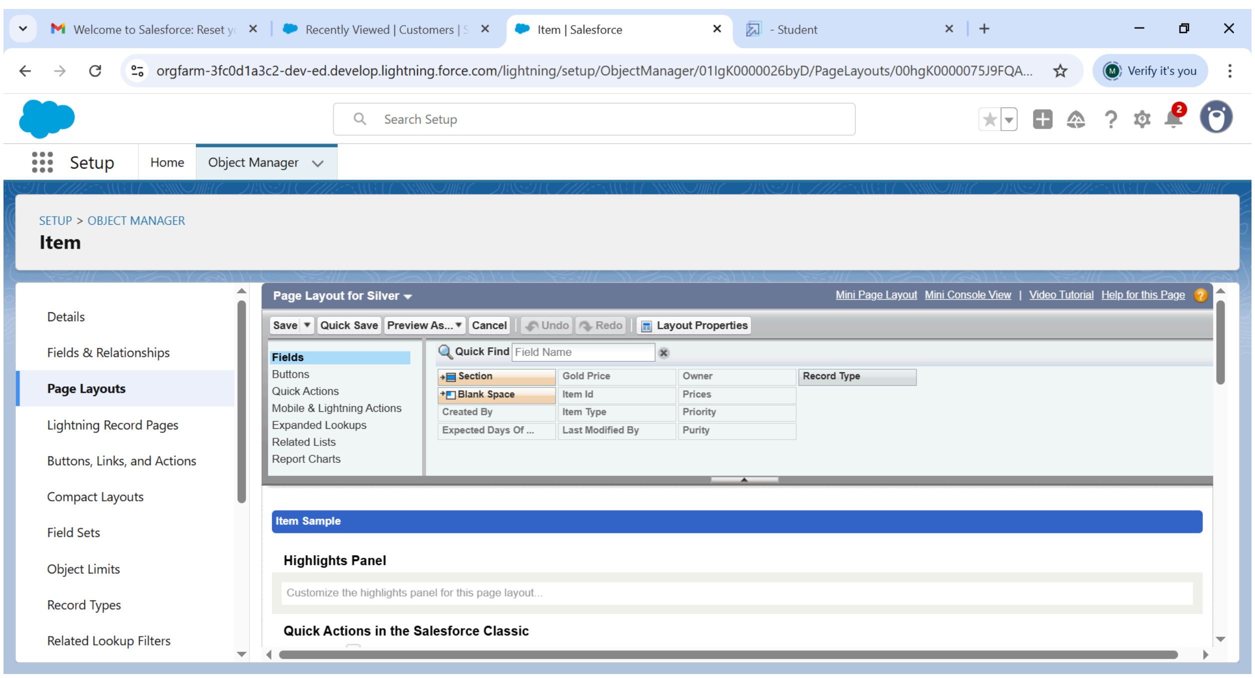




Page layouts

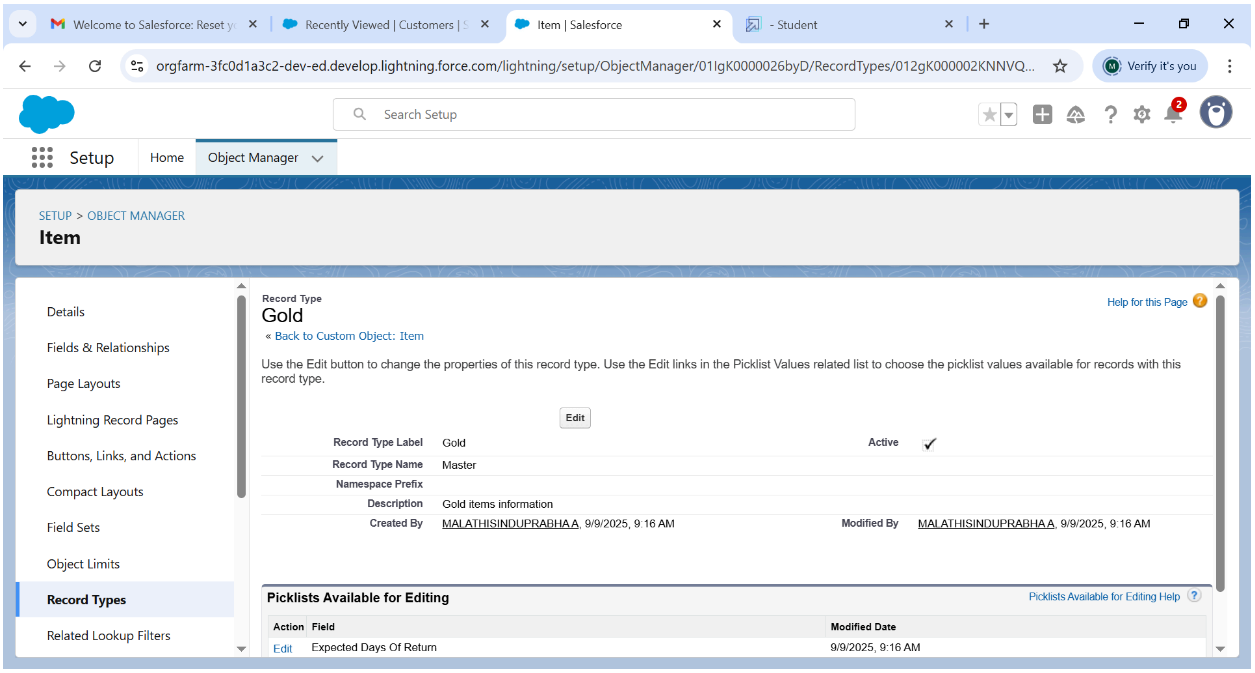
Page layouts are the blueprint of any CRM record's interface, controlling the visibility and arrangement of data fields, sections, related lists, and buttons on modules like leads, accounts, deals, or contacts. They help organize information logically and highlight the most pertinent data based on user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

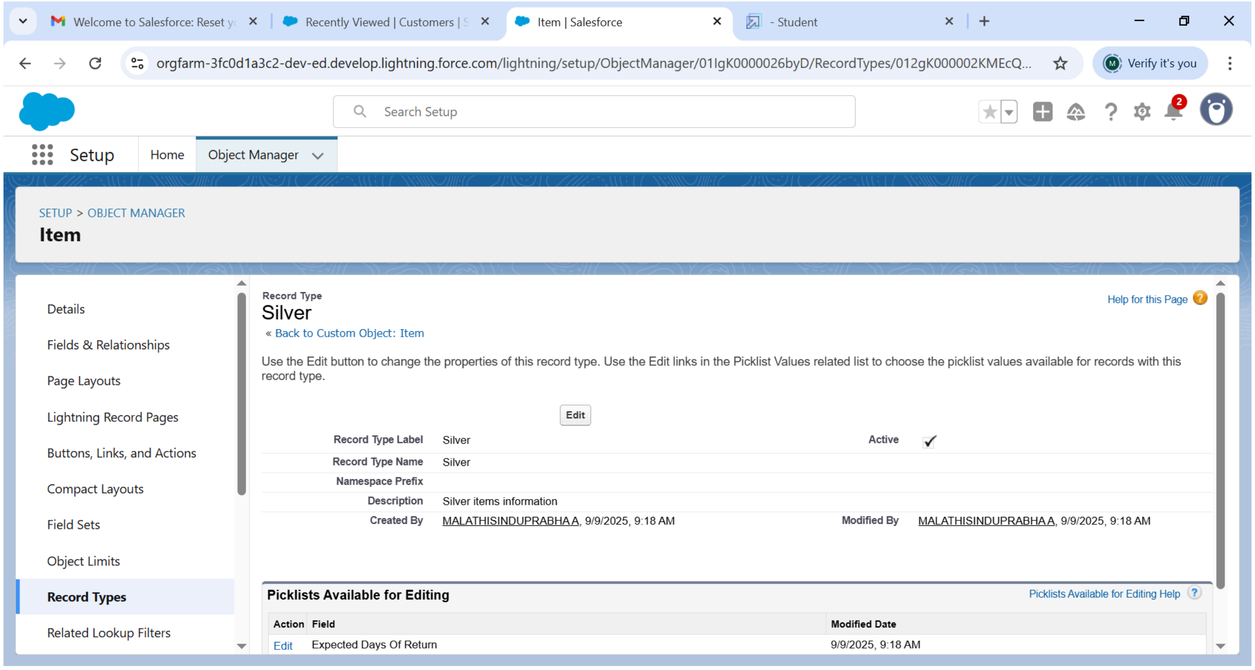




Record Type

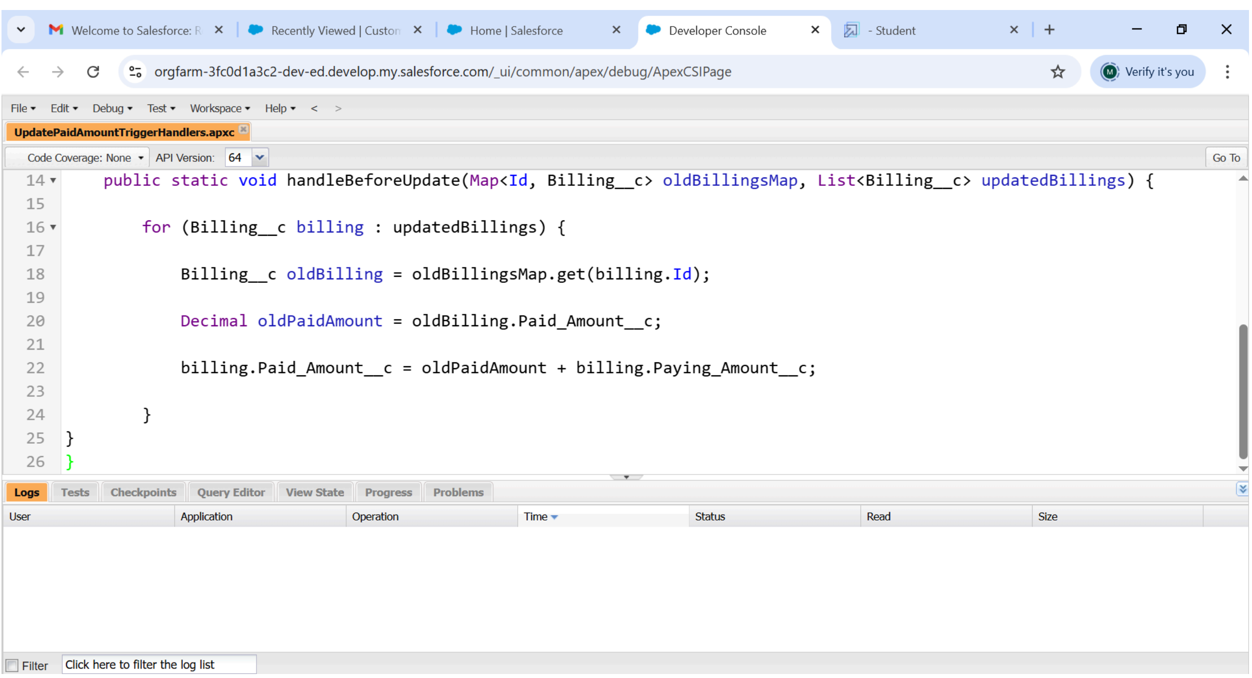
A CRM (Customer Relationship Management) Developer is responsible for customizing, developing, and maintaining CRM systems to support business processes such as sales, marketing, and customer service. One of the key tasks often involves creating flows or automation workflows that streamline operations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

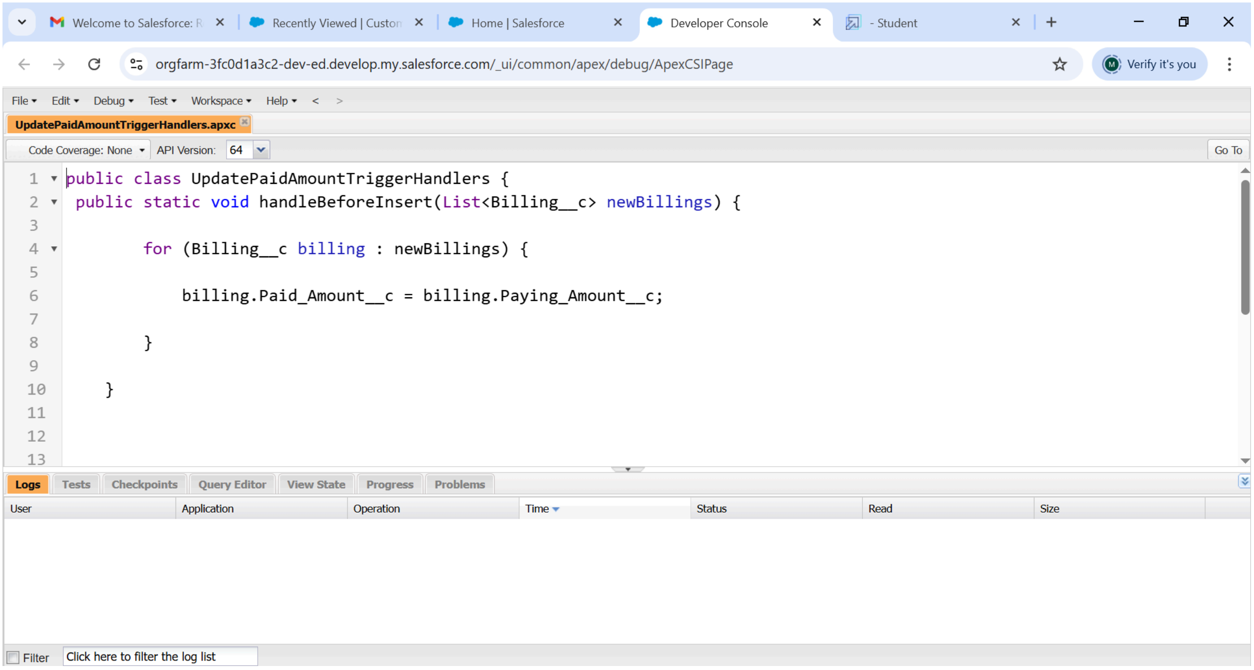




Apex Class

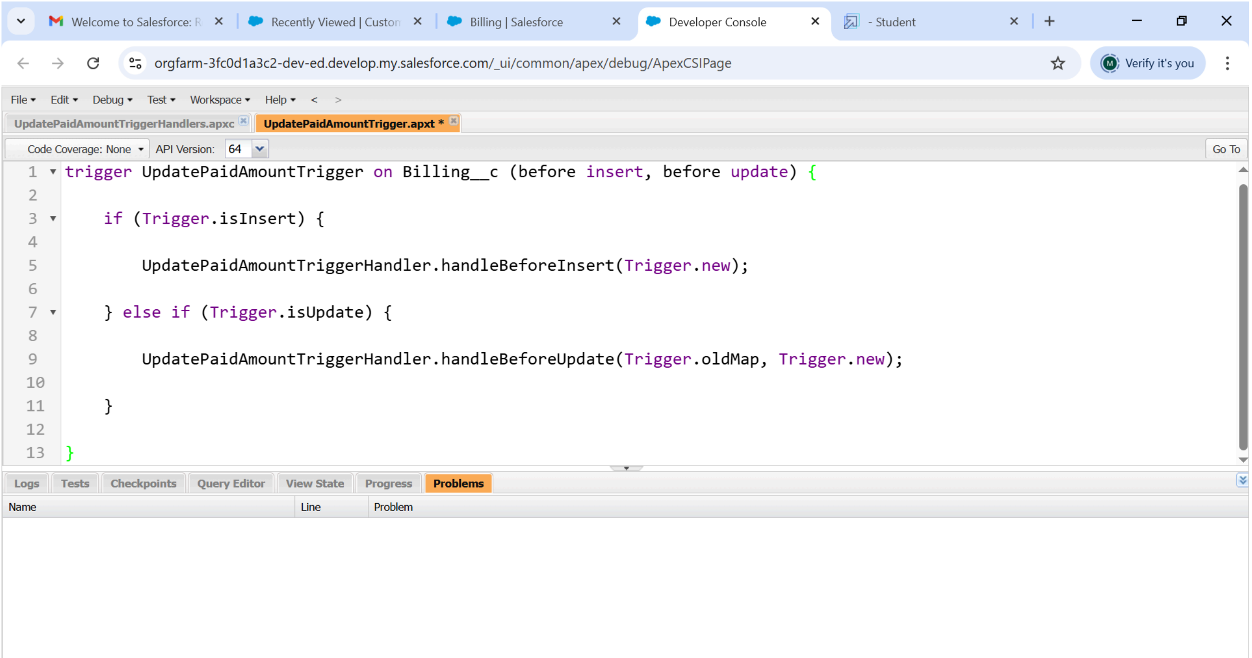
Create an Paid Amount



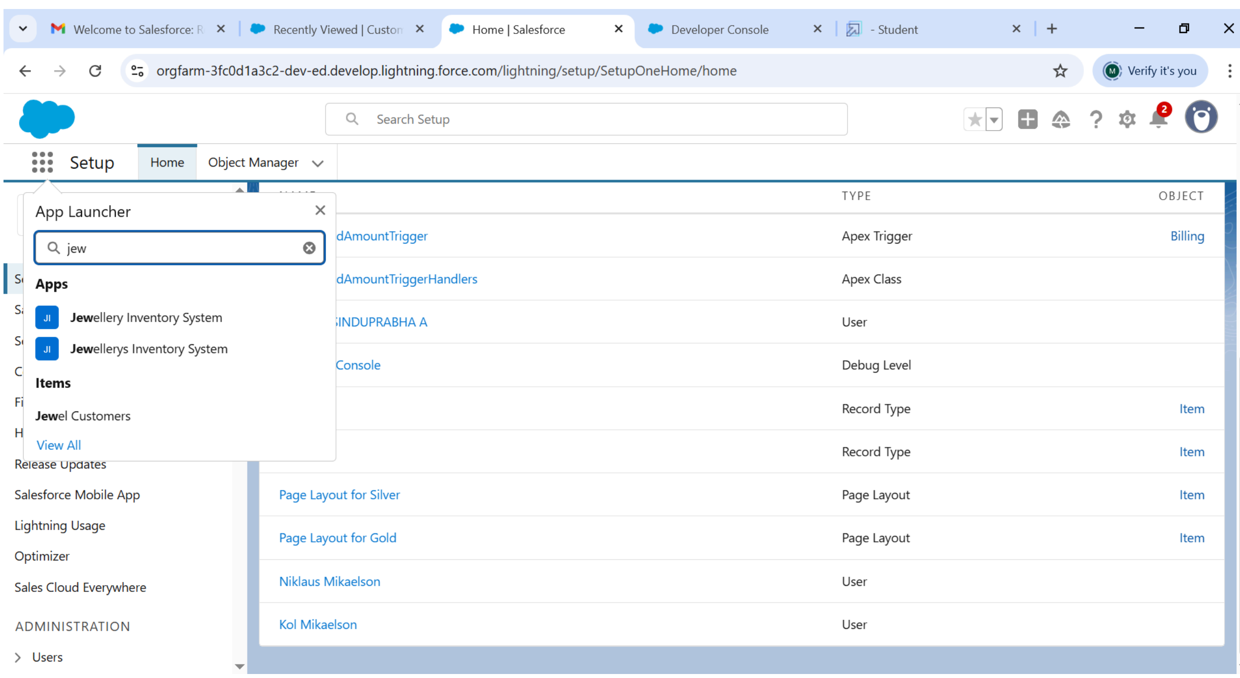


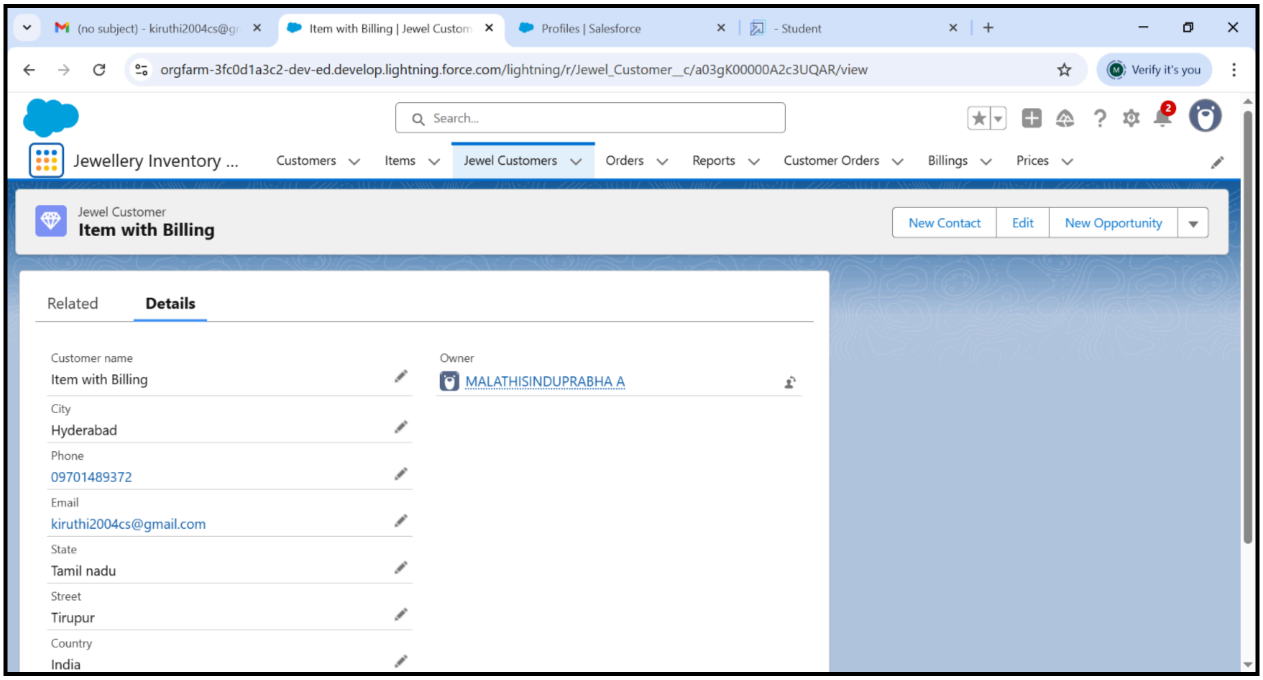
Apex Trigger

Create a Trigger Paid Amount

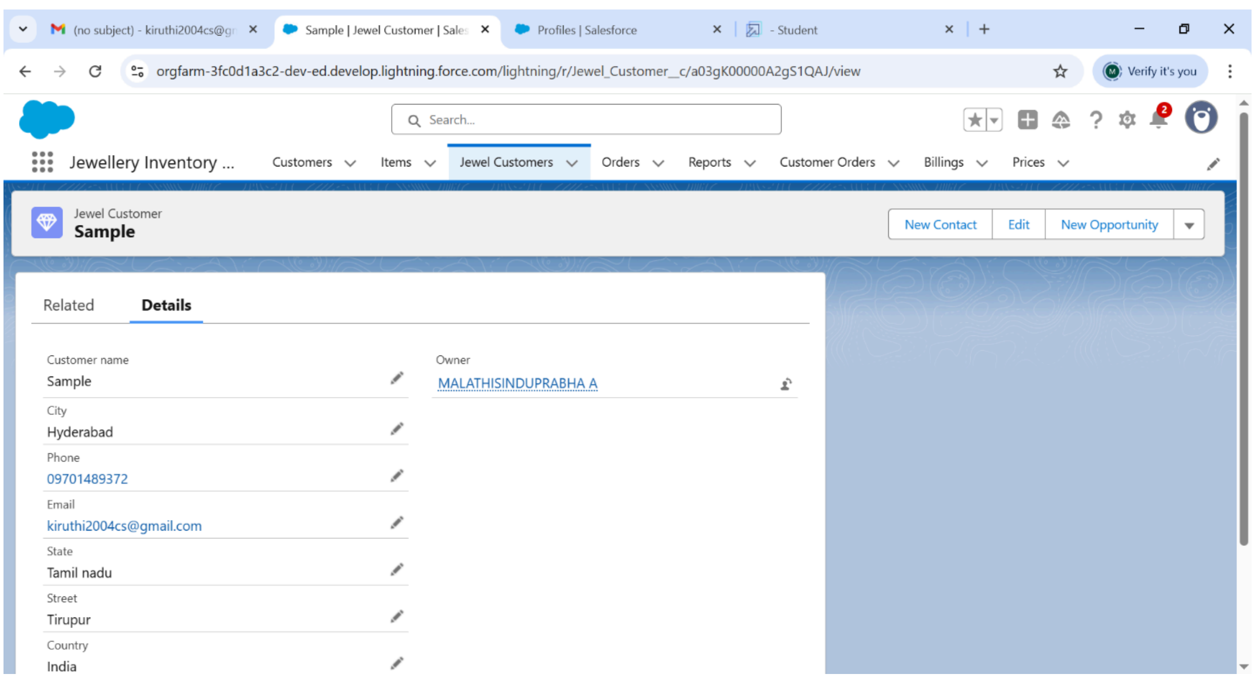


Create a User Adoption





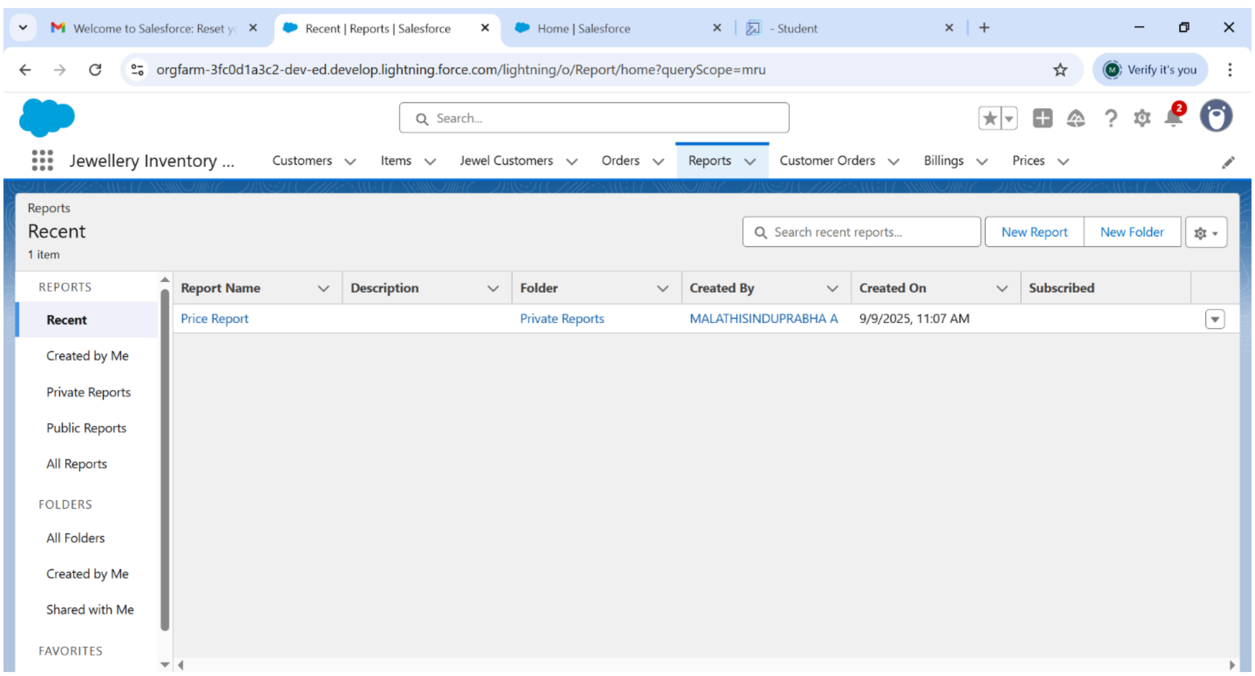
Item with Billing | Jewel Custom
Profiles | Salesforce
orgfarm-3fc0d1a3c2-dev-ed.develop.lightning.force.com/lightning/r/Jewel_Customer__c/a03gK00000A2c3UQAR/view
Jewellery Inventory ...
Customers
Items
Jewel Customers
Orders
Reports
Customer Orders
Billings
Prices
Jewel Customer
Item with Billing
New Contact
Edit
New Opportunity
Related
Details
Customer name
Item with Billing
Owner
MALATHISINDUPRABHA A
City
Hyderabad
Phone
09701489372
Email
kiruthi2004cs@gmail.com
State
Tamil nadu
Street
Tirupur
Country
India



Sample | Jewel Customer | Sales
Profiles | Salesforce
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
Jewel Customer
Sample
New Contact
Edit
New Opportunity
Related
Details
Customer name
Sample
Owner
MALATHISINDUPRABHA A
City
Hyderabad
Phone
09701489372
Email
kiruthi2004cs@gmail.com
State
Tamil nadu
Street
Tirupur
Country
India

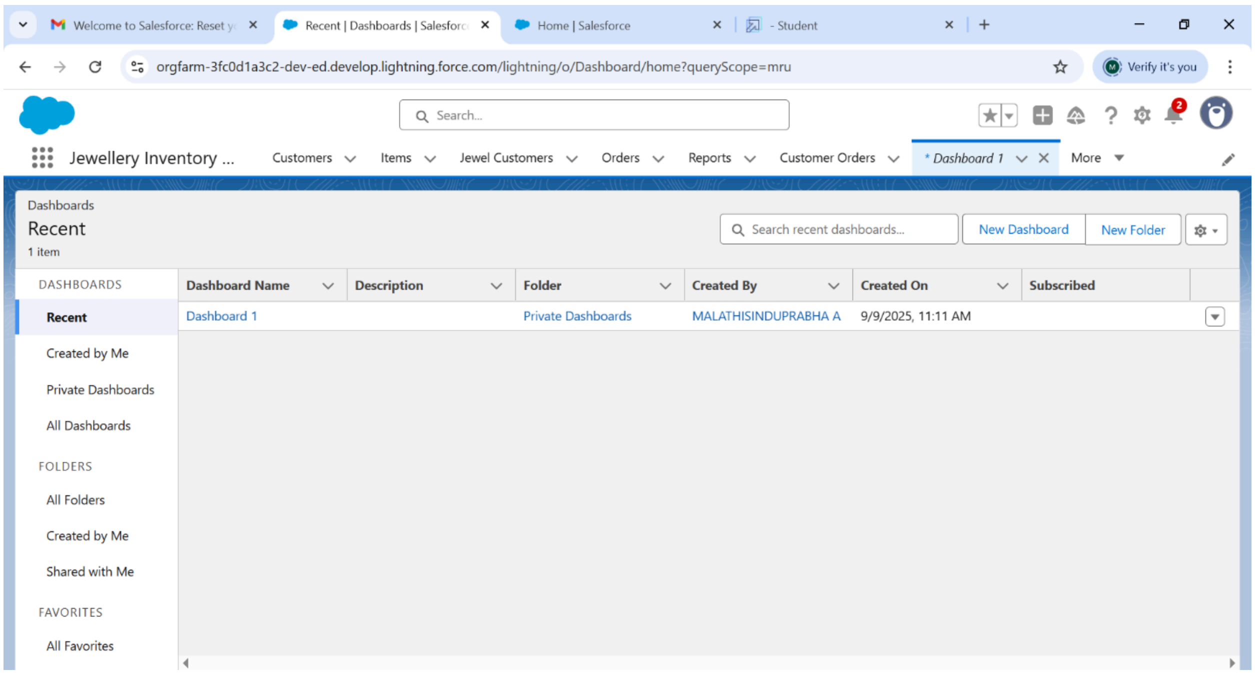
Reports

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.



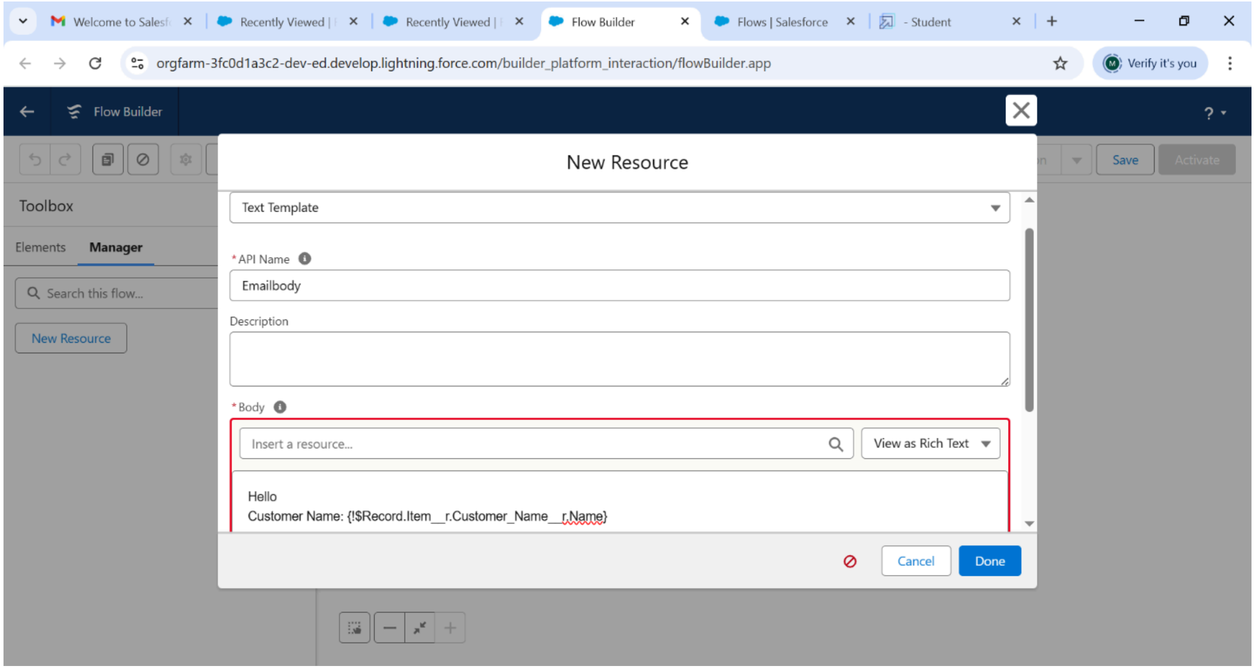
Dashboard

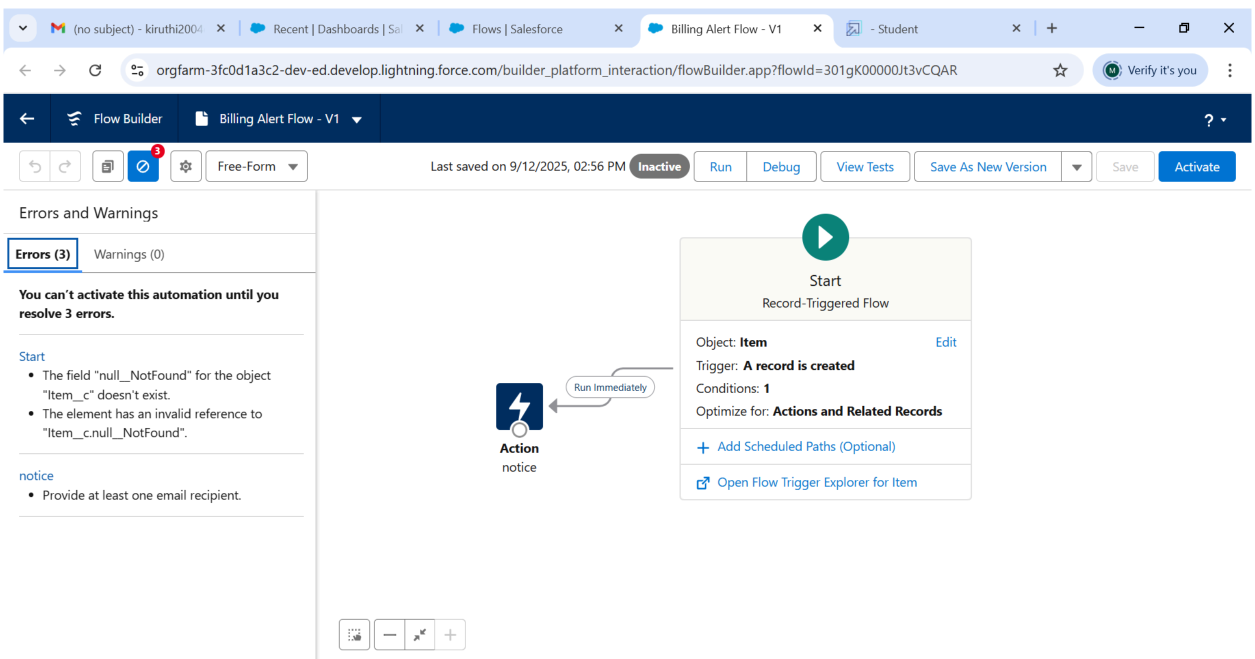
A CRM (Customer Relationship Management) dashboard provides real-time insights and visualizations tailored for different business units to enhance efficiency and decision-making. When developing a CRM dashboard that serves sales, marketing, and customer service teams, it is essential to design role-specific 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.


Welcome to Salesf
Recently Viewed |
Recently Viewed |
Flow Builder
Flows | Salesforce
- Student
orgfarm-3fc0d1a3c2-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app
Verify it's you
Flow Builder
Save
Activate
Toolbox
Elements
Manager
Search this flow...
New Resource
New Resource
Text Template
* API Name
Emailbody
Description
* Body
Insert a resource...
View as Rich Text
Hello
Customer Name: {!$Record.Item__r.Customer_Name__r.Name}
Cancel
Done


(no subject) - kiruthi2004
Recent | Dashboards | Sa
Flows | Salesforce
Billing Alert Flow - V1
- Student
orgfarm-3fc0d1a3c2-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301gK00000Jt3vCQAR
Verify it's you
Flow Builder
Billing Alert Flow - V1
Free-Form
Last saved on 9/12/2025, 02:56 PM
Inactive
Run
Debug
View Tests
Save As New Version
Save
Activate
Errors and Warnings
Errors (3)
Warnings (0)
You can't activate this automation until you resolve 3 errors.
Start
The field "null__NotFound" for the object "Item__c" doesn't exist.
The element has an invalid reference to "Item__c.null__NotFound".
notice
Provide at least one email recipient.
Start
Record-Triggered Flow
Object: Item
Edit
Trigger: A record is created
Conditions: 1
Optimize for: Actions and Related Records
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Item
Run Immediately
Action
notice

THANK YOU