

CRM APPLICATION FOR JEWEL MANAGEMENT

College Name : KG COLLEGE OF ARTS AND SCIENCE

Team ID : NM2025MID23642

Team size : 4

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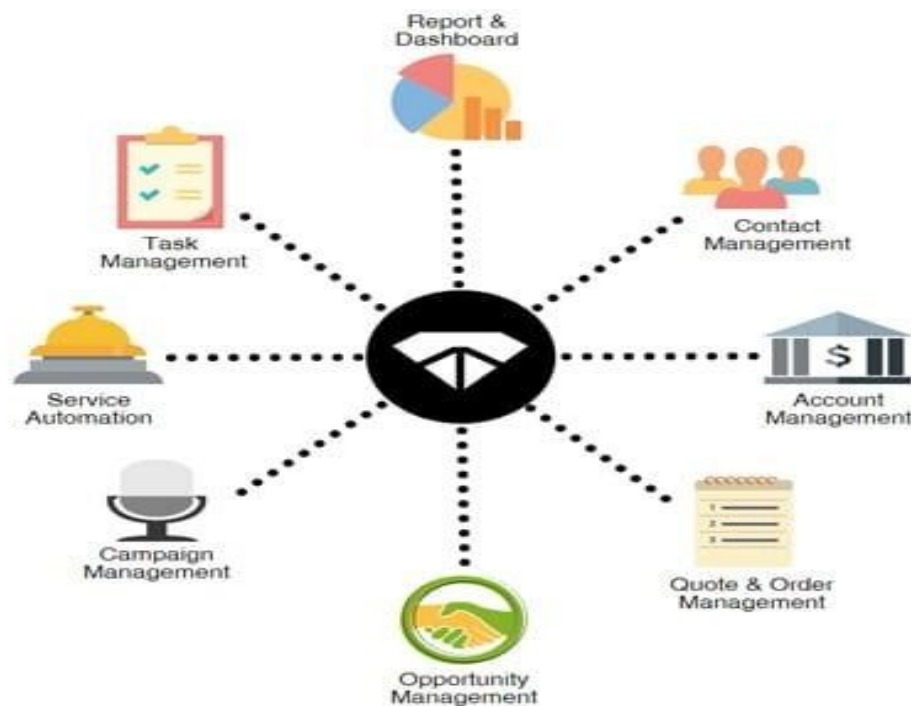
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Email : 2326kb24@kgcas.com

1.INTRODUCTION

1.1 Project Overview

The CRM system for jewelry management integrates customer data with product details, sales, inventory, and marketing campaigns to enhance the customer experience and drive business growth. It allows jewelry stores or manufacturers to manage their operations more effectively, improve customer satisfaction, and maximize sales.



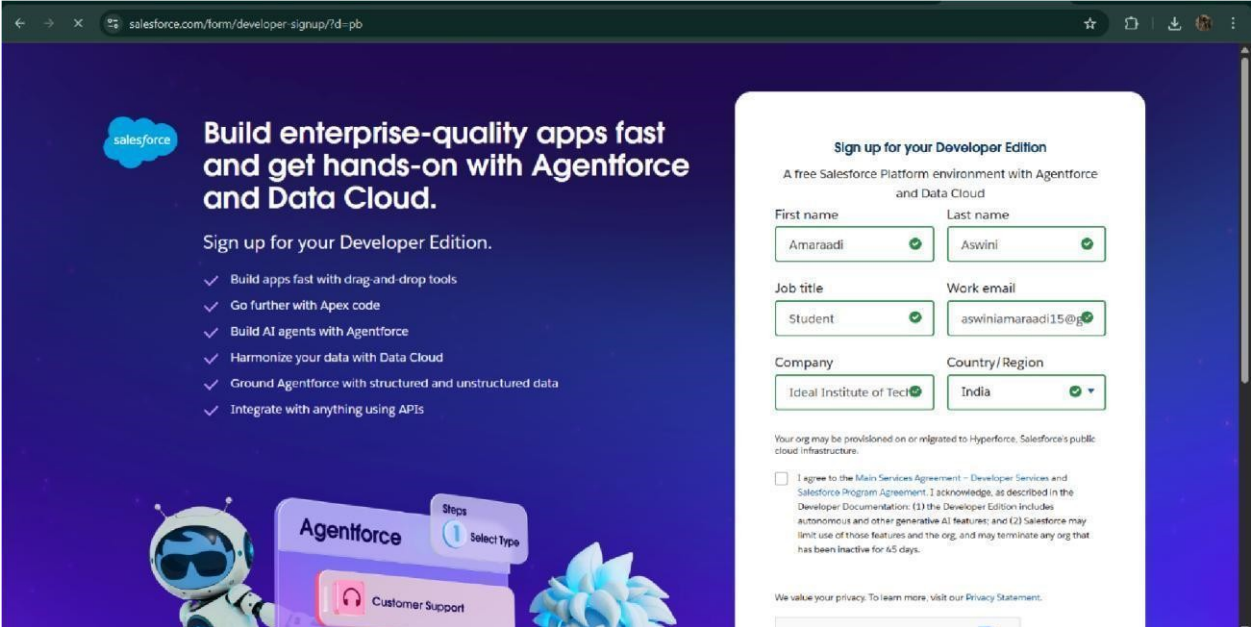
1.2 Purpose

The purpose of a **CRM Application for Jewelry Management** is to streamline and enhance the overall operations of a jewelry business while improving the relationship with its customers. By tracking customer preferences, purchase history, and interactions, the CRM allows businesses to provide more personalized services and offers.

2.DEVELOPMENT PHASE

Creating Developer Account:

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



The screenshot shows the Salesforce Developer Edition signup page. The left side features a dark blue background with the Salesforce logo, the text "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.", and a list of benefits. The right side is a white form titled "Sign up for your Developer Edition" with fields for personal and professional information. At the bottom, there is a checkbox for the Terms of Service and a link to the Privacy Statement.

Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

Sign up for your Developer Edition.

- ✓ Build apps fast with drag-and-drop tools
- ✓ Go further with Apex code
- ✓ Build AI agents with Agentforce
- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs

Sign up for your Developer Edition
A free Salesforce Platform environment with Agentforce and Data Cloud

First name: Amaraadi ✓ Last name: Aswini ✓

Job title: Student ✓ Work email: aswiniamaraadi15@gmail.com ✓

Company: Ideal Institute of Technology ✓ Country/Region: India ✓

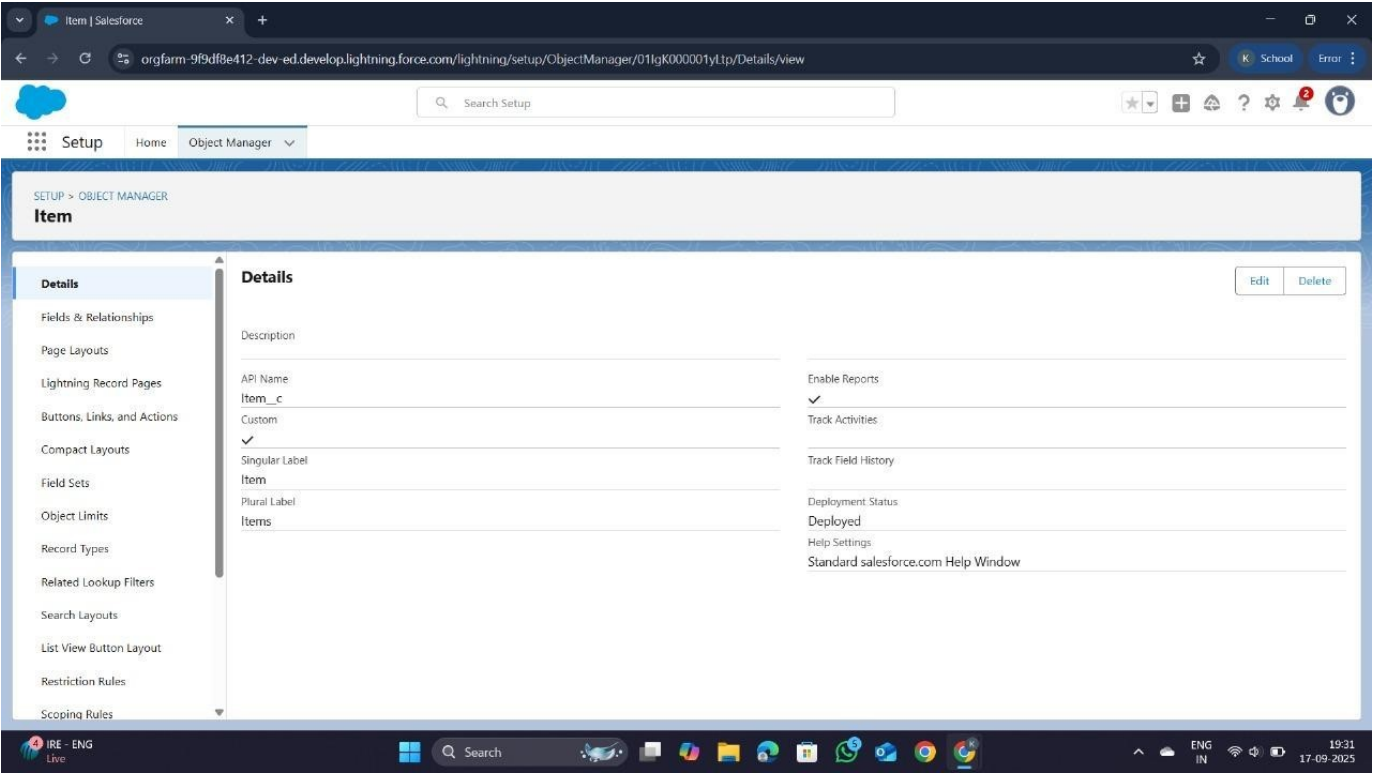
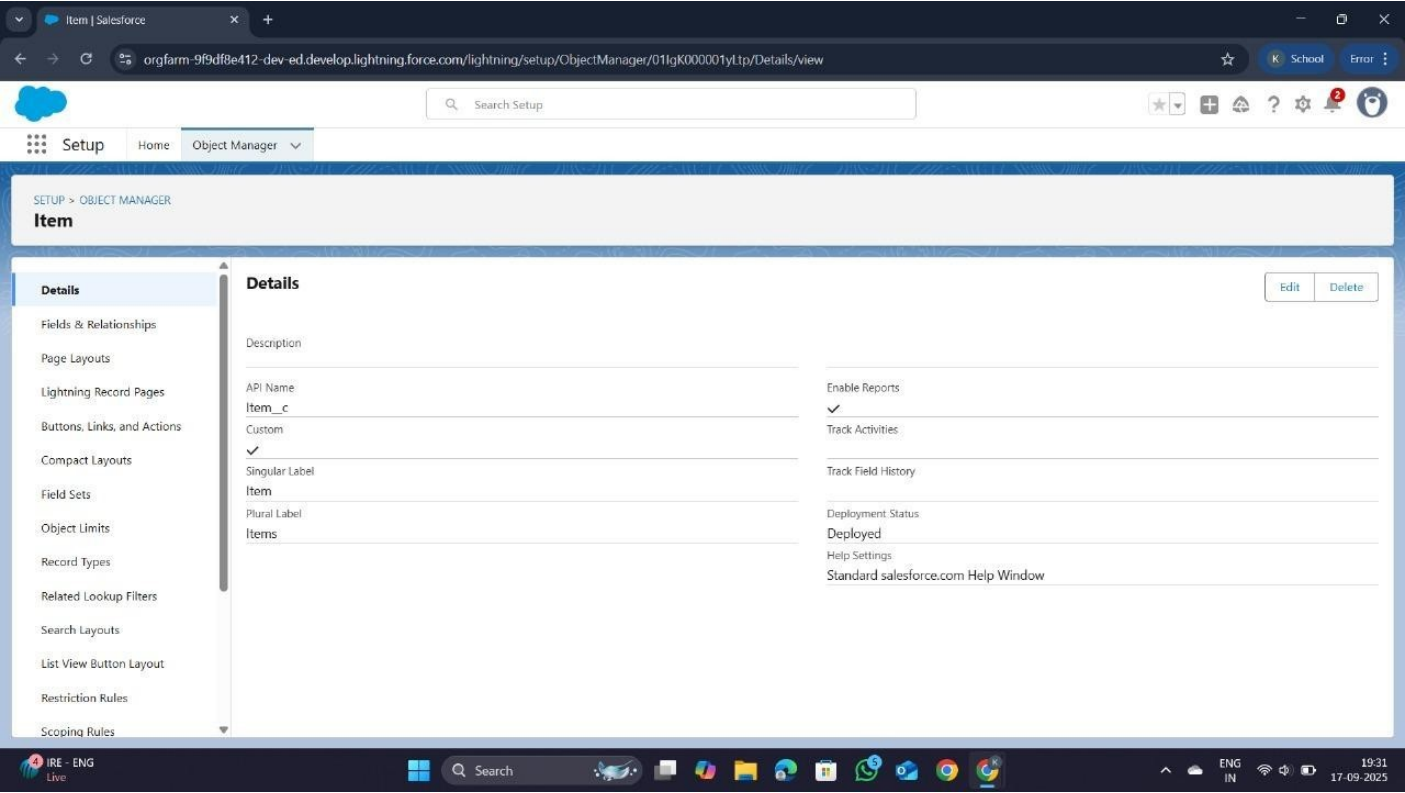
Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☐ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 65 days.

We value your privacy. To learn more, visit our Privacy Statement.

- Created objects: Involve creating various objects (entities) that represent different aspects of the jewelry business.

Created jewel object :



Created a custom tab :

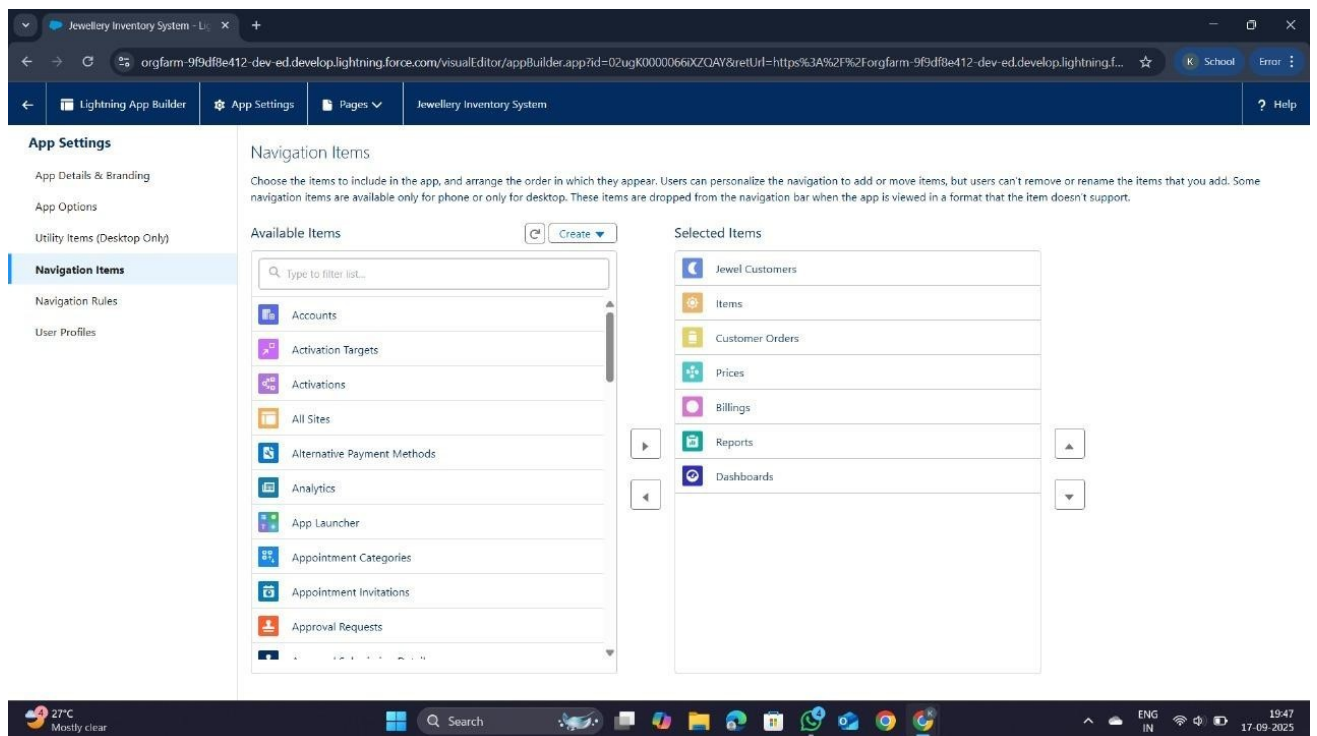
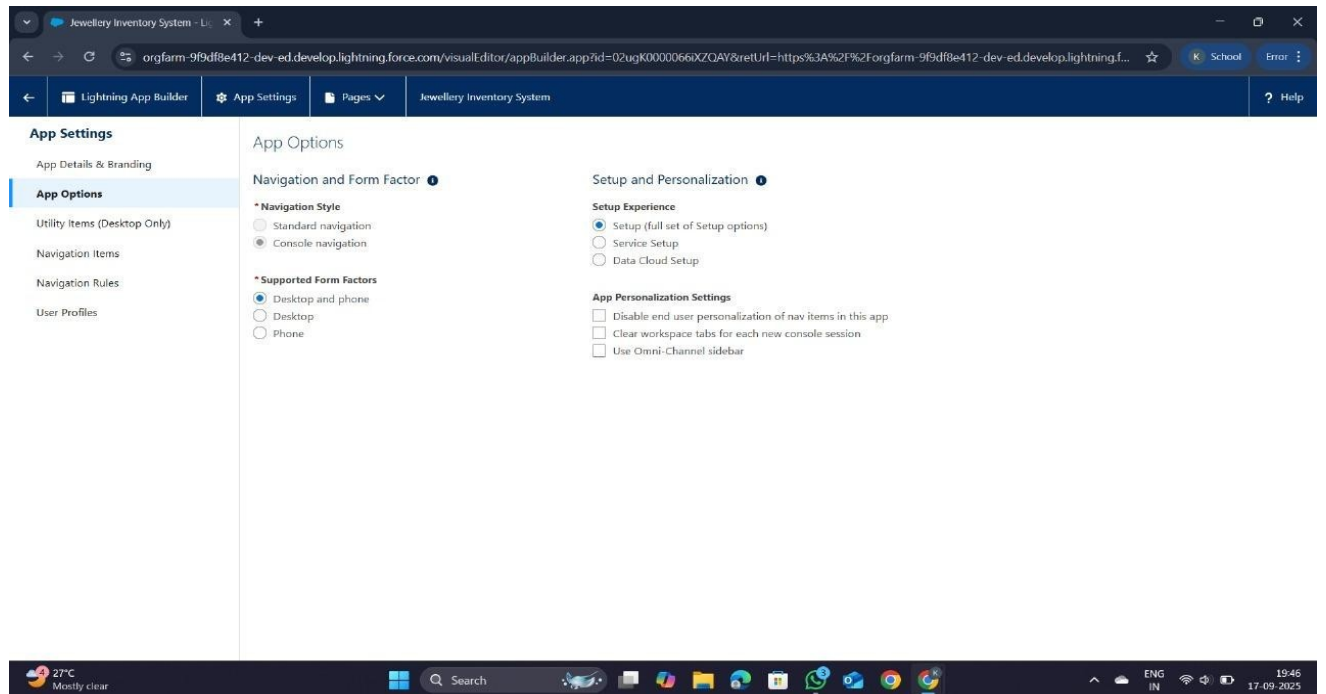
The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "tabs" entered. Under "User Interface", the "Tabs" option is selected. The main content area is titled "Custom Tabs" and includes a "Help for this Page" link. Below the title, there is a paragraph explaining custom tabs. The "Custom Object Tabs" section contains a table with columns: Action, Label, Tab Style, and Description. The table lists five tabs: Billings, Customer Orders, Items, Jewel Customers, and Prices. The "Items" tab is highlighted. Below this, the "Web Tabs" and "Visualforce Tabs" sections are shown, both indicating that no tabs have been defined.

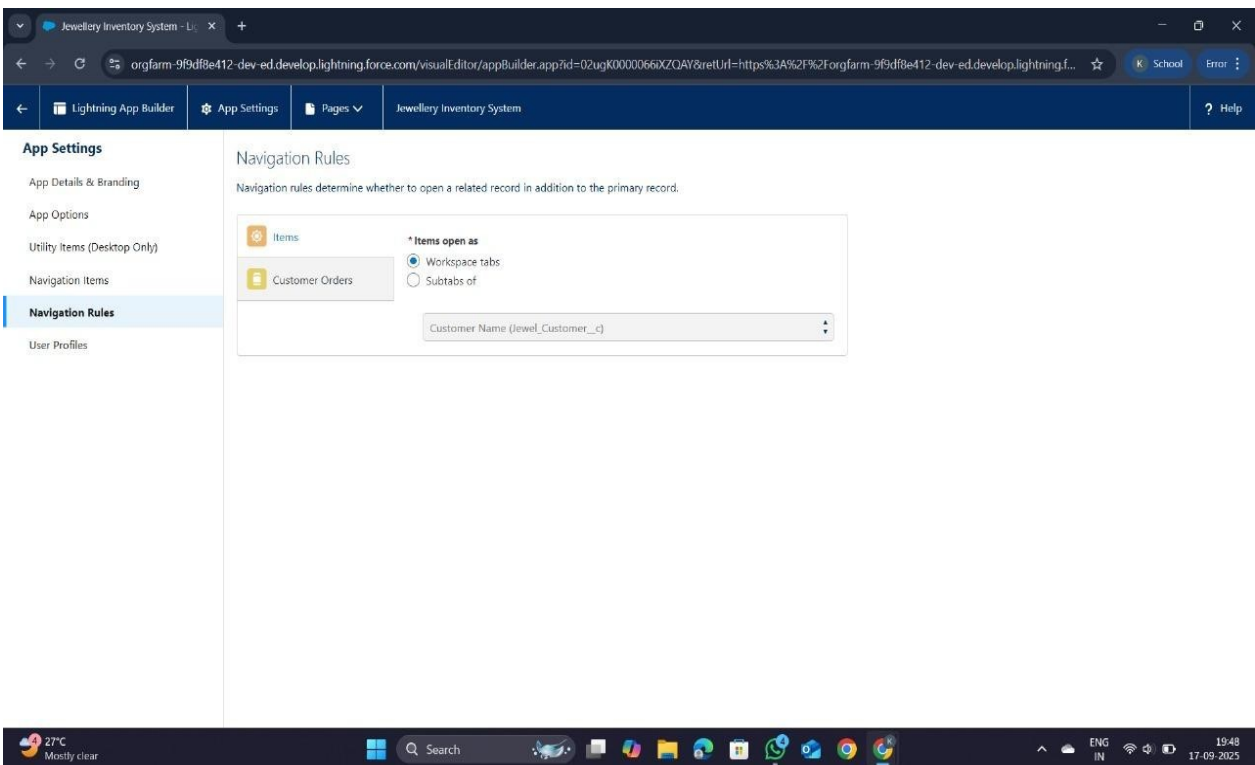
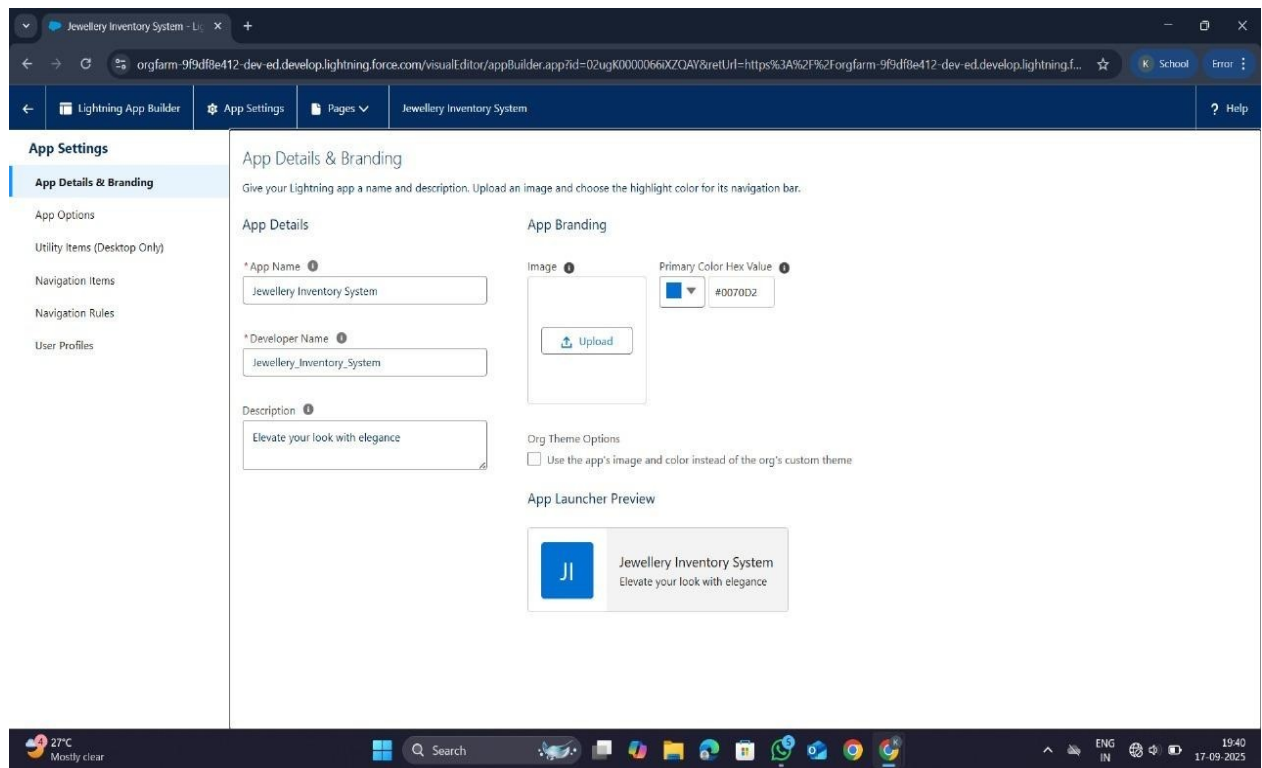
Action	Label	Tab Style	Description
Edit Del	Billings	Circle	
Edit Del	Customer Orders	Can	
Edit Del	Items	Sun	
Edit Del	Jewel Customers	Moon	
Edit Del	Prices	Fish	

The screenshot shows the "Custom Tab Definition Detail" for the "Items" tab. The left sidebar is the same as the previous screenshot. The main content area is titled "Custom Object Tab Items" and includes a "Help for this Page" link. Below the title, there is a paragraph explaining the information for the custom tab. The "Custom Tab Definition Detail" section contains a table with columns: Tab Label, Object, Description, Created By, Tab Style, and Modified By. The table shows the details for the "Items" tab, which is highlighted. The "Created By" field is "KEERTHANA.R." and the "Modified By" field is "KEERTHANA.R.".

Tab Label	Object	Description	Created By	Tab Style	Modified By
Items	Item		KEERTHANA.R. 9/1/2025, 10:33 PM	Sun	KEERTHANA.R. 9/1/2025, 10:33 PM

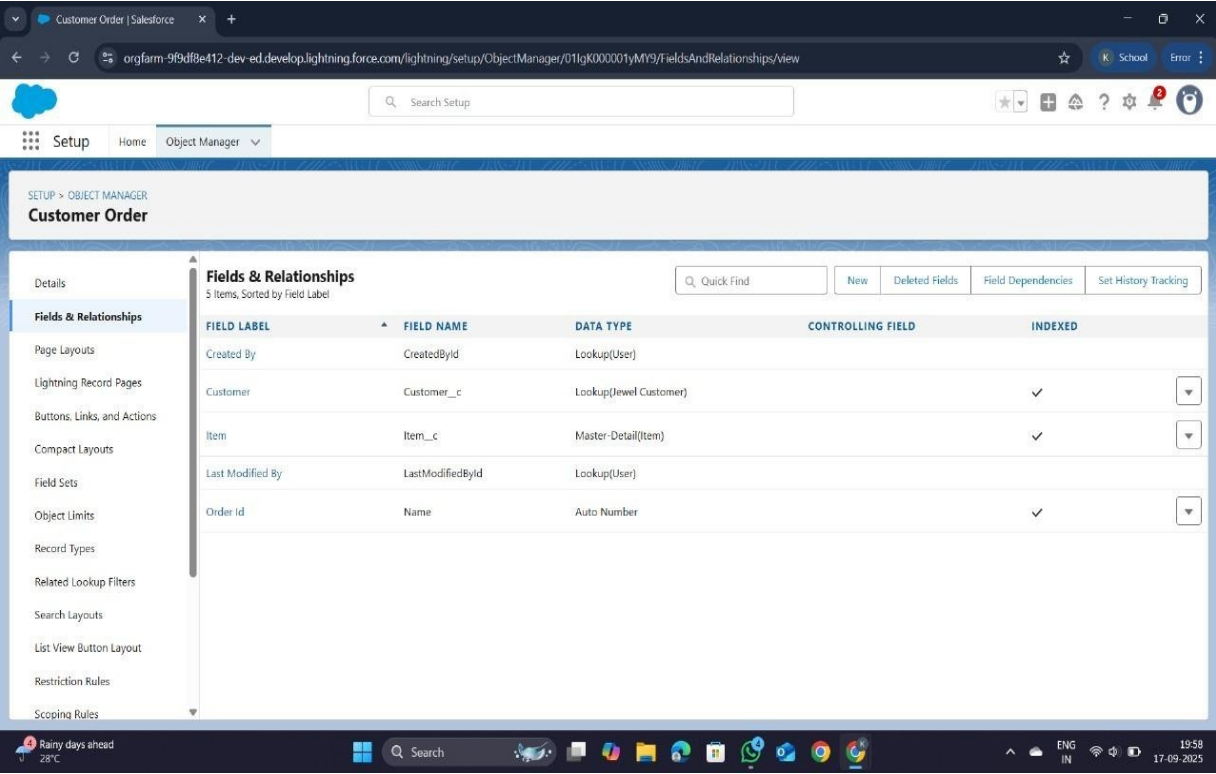
Created a lightning app :



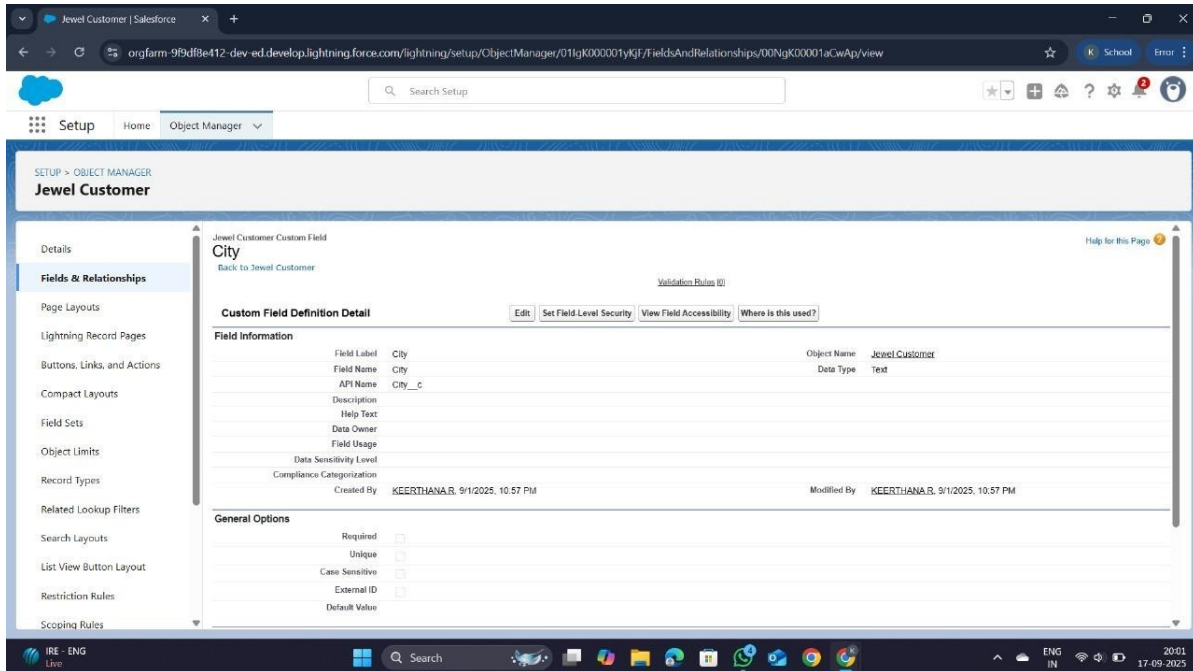


Created

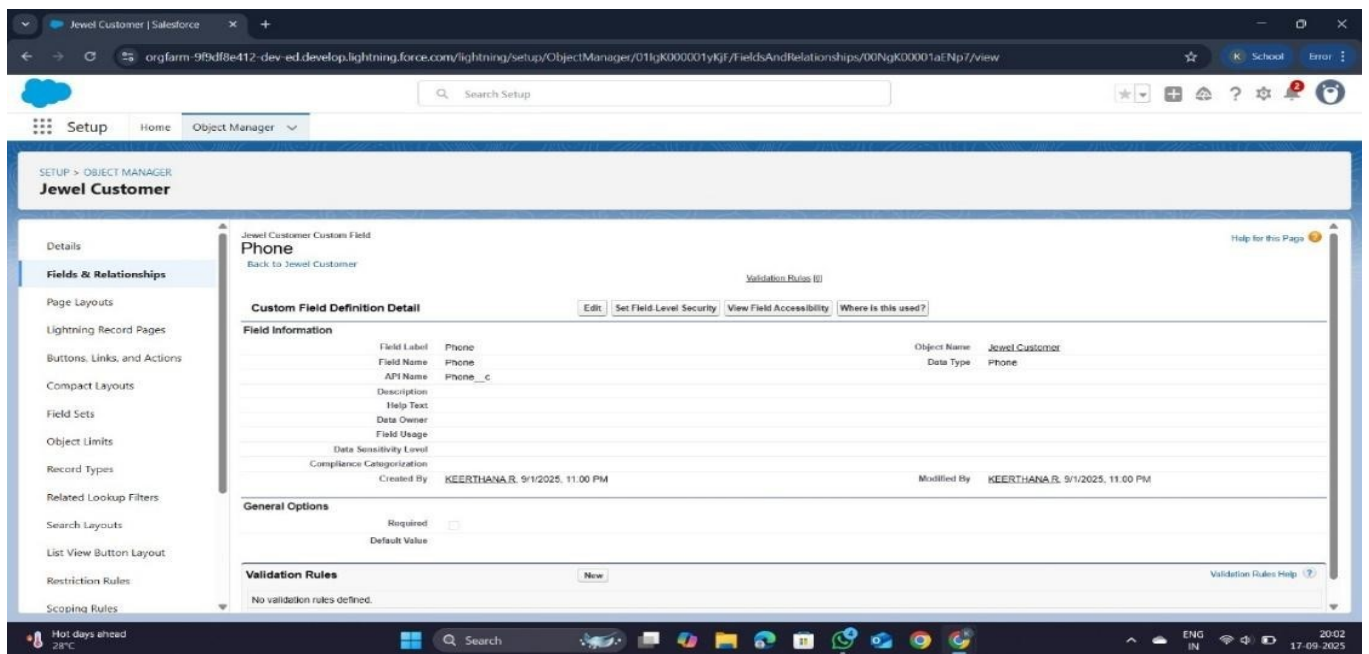
Lookup-relationship and creating a master-detail relationship :



Created Text field in jewel customer object :

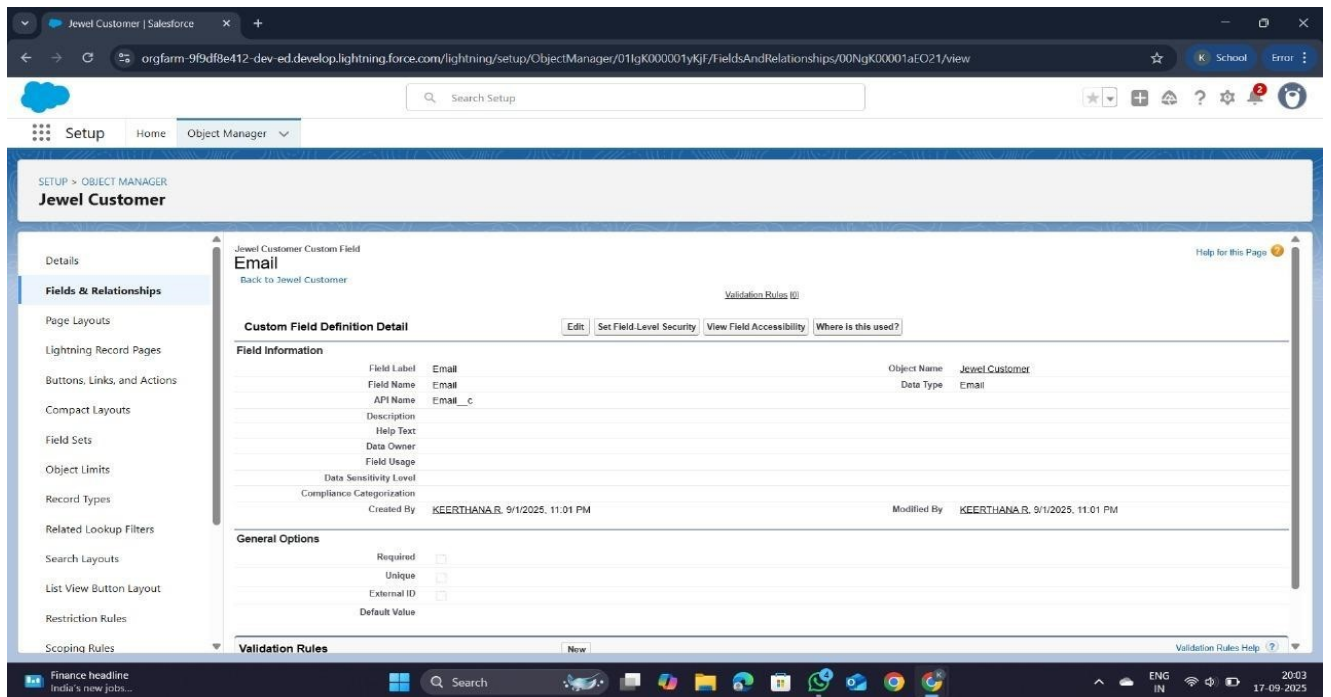


Created the phone field in object jewel customer :



Created the Email field in object jewel customer :

Created

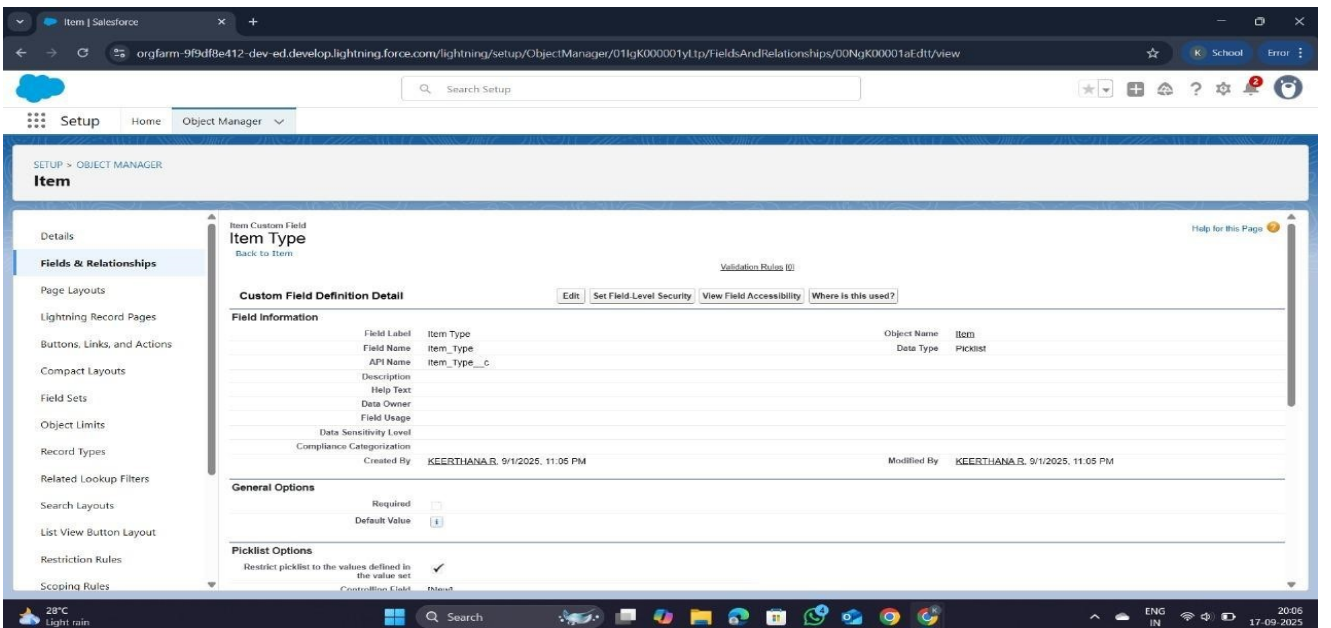


The screenshot shows the Salesforce Setup interface for the 'Jewel Customer' object. The 'Fields & Relationships' tab is selected, displaying the 'Email' custom field. The 'Field Information' section shows the field label as 'Email', field name as 'Email', and API name as 'Email__c'. The 'General Options' section shows the field is not required, unique, or an external ID, with a default value of blank. The 'Validation Rules' section is empty.

Field Information	
Field Label	Email
Field Name	Email
API Name	Email__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	KEERTHANAB, 9/1/2025, 11:01 PM
Modified By	KEERTHANAB, 9/1/2025, 11:01 PM

General Options	
Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
Default Value	

Picklist field in item object :



The screenshot shows the Salesforce Setup interface for the 'Item' object. The 'Fields & Relationships' tab is selected, displaying the 'Item Type' custom field. The 'Field Information' section shows the field label as 'Item Type', field name as 'item_type', and API name as 'item_type__c'. The 'General Options' section shows the field is not required, with a default value of '1'. The 'Picklist Options' section shows the field is restricted to the values defined in the value set.

Field Information	
Field Label	Item Type
Field Name	item_type
API Name	item_type__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	KEERTHANAB, 9/1/2025, 11:05 PM
Modified By	KEERTHANAB, 9/1/2025, 11:05 PM

General Options	
Required	<input type="checkbox"/>
Default Value	1

Picklist Options	
Restrict picklist to the values defined in the value set	<input checked="" type="checkbox"/>

Created currency field in price object :

The image displays two screenshots of the Salesforce Setup interface, specifically the 'Object Manager' section, showing the configuration of custom fields for two different objects: 'Price' and 'Item'.

Top Screenshot: Price Object

- Page Title:** Price Custom Field: Gold Price
- Navigation:** Details, Fields & Relationships (selected), 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.
- Field Information:**
 - 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: KEERTHANAB, 9/1/2025, 11:07 PM
 - Modified By: KEERTHANAB, 9/1/2025, 11:07 PM
- General Options:**
 - Required: ☐
 - Default Value:
- Currency Options:**
 - Length: 8
 - Decimal Places: 0

Bottom Screenshot: Item Object

- Page Title:** Item Custom Field: Gold Price
- Navigation:** Details, Fields & Relationships (selected), 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.
- Field Information:**
 - 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: KEERTHANAB, 9/1/2025, 11:28 PM
 - Modified By: KEERTHANAB, 9/1/2025, 11:28 PM
- Formula Options:**
 - Data Type: Formula
 - Decimal Places: 2
 - Formula: Prices__f Gold_Price__c / 10

- Formula field (cross object) in item object.

Created remaining fields in objects :

Created

The screenshot shows the Salesforce Object Manager interface for the 'Jewel Customer' object. The 'Fields & Relationships' tab is selected, displaying a list of 11 fields sorted by label. The fields are:

Field Label	Field Name	Data Type	Controlling Field	Indexed
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)		

fields and relationships :

The screenshot shows the Salesforce Object Manager interface for the 'Item' object. The 'Fields & Relationships' tab is selected, displaying a list of 20 fields sorted by label. The fields are:

Field Label	Field Name	Data Type	Controlling Field	Indexed
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Customer Name	CustomerName__c	Text(80)		✓
Expected Days Of Return	ExpectedDaysOfReturn__c	Text		
Item Price	ItemPrice__c	Formula (Currency)		
Last Modified By	LastModifiedById	Lookup(User)		
Marketing Charges	MarketingCharges__c	Formula (Currency)		
Quantity	Quantity__c	Text		
Owner	OwnerId	Lookup(User Group)		✓
Part Number	PartNumber__c	Text(20)		
Phone	Phone__c	Phone		
Shipping Charges	ShippingCharges__c	Formula (Currency)		
State	State__c	Text(20)		
Street	Street__c	Text(20)		
Zip/Postal code	Zip_Postal_code__c	Text(6)		
Weight	Weight__c	Text(6)		

Customer Order | Salesforce

orgfarm-9f9df8e412-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001yMY9/FieldsAndRelationships/view

Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Customer Order

Details

Fields & Relationships

6 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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

27°C Light rain

Search

ENG IN

20:54 17-09-2025

Price | Salesforce

orgfarm-9f9df8e412-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001yMZ/FieldsAndRelationships/view

Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Price

Details

Fields & Relationships

6 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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)		

27°C Light rain

Search

ENG IN

20:53 17-09-2025

Created

Setup | Salesforce

orgfarm-9f9df8e412-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gK000001yML3/FieldsAndRelationships/view

Search Setup

Setup | Home | Object Manager

SETUP > OBJECT MANAGER

Billing

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

14 Items, Sorted by Field Label

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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)	✓	
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)		

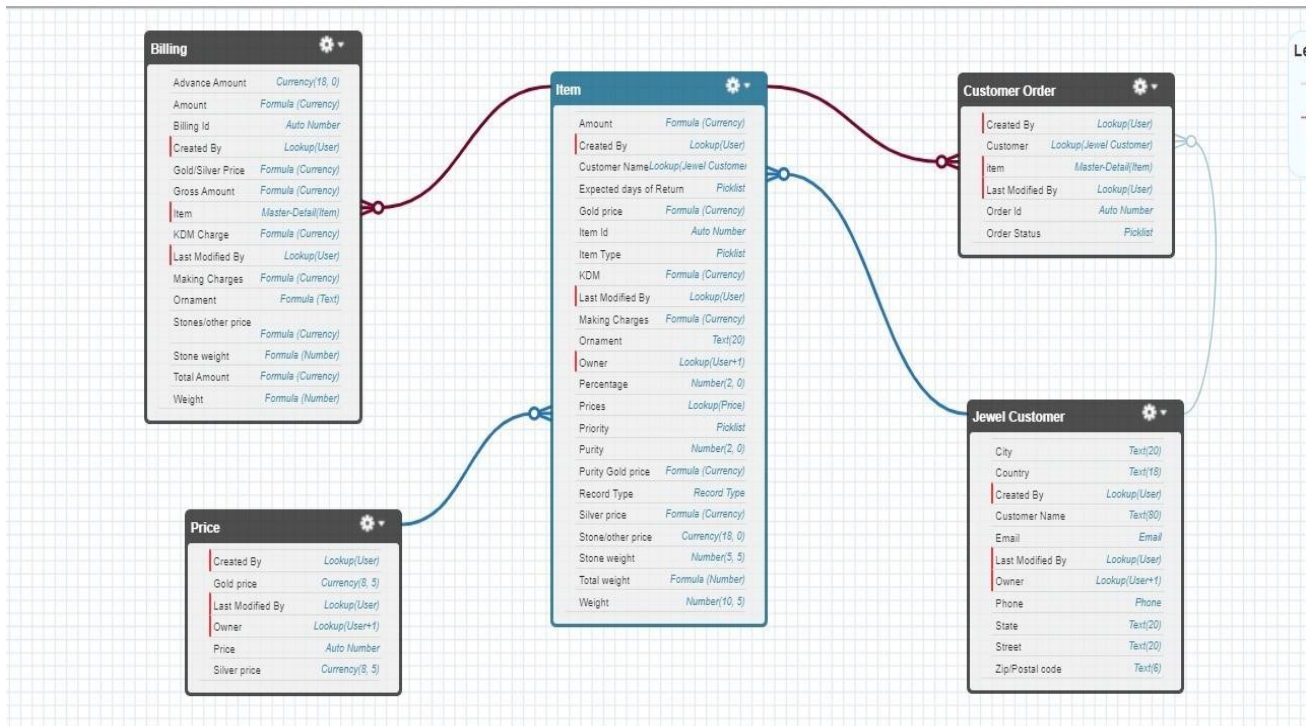
27°C
Light rain

Search

ENG
IN

20:55
17-09-2025

Schema builder :



Created the field dependencies :

The screenshot shows the Salesforce Setup page for the **Item** object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), 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 content area displays the configuration for the **Item** object. It includes sections for Picklist Options, Picklist Values Used, Field Dependencies, Validation Rules, and Values.

Field Dependencies

Action	Dependent Field	Data Type	Modified By
Edit Del	Expected Days Of Return	Picklist	KEERTHANA.R. 9/17/2025, 8:34 AM

Validation Rules

No validation rules defined.

Values

Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> Edit Del Deactivate	Low	Low	<input type="checkbox"/>	Assigned dynamically	KEERTHANA.R. 9/12/2025, 11:40 PM
<input type="checkbox"/> Edit Del Deactivate	Medium	Medium	<input type="checkbox"/>	Assigned dynamically	KEERTHANA.R. 9/12/2025, 11:40 PM
<input type="checkbox"/> Edit Del Deactivate	High	High	<input type="checkbox"/>	Assigned dynamically	KEERTHANA.R. 9/12/2025, 11:40 PM
<input type="checkbox"/> Edit Del Deactivate	Critical	Critical	<input type="checkbox"/>	Assigned dynamically	KEERTHANA.R. 9/12/2025, 11:40 PM

Profiles :

The screenshot displays the Salesforce Object Manager interface for an Item Validation Rule. The browser address bar shows the URL: `orgfarm-9f9df8e412-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F03dgK0000000Q965`. The page title is "Item Validation Rule" with a "Back to Item" link. The "Validation Rule Detail" section includes the following information:

Field	Value
Rule Name	ValidationRule_For_Item
Error Condition Formula	OR(ISBLANK(Amount__c), ISBLANK(Customer_Name__c), ISBLANK(Gold_Price__c), ISBLANK(KDM__c), ISBLANK(Ornament__c), ISBLANK(Percentage__c), ISBLANK(Making_Charges__c), ISBLANK(Prices__c), ISBLANK(Stone_Weight__c), ISBLANK(Silver_Price__c), ISBLANK(Stone_Other_Price__c), ISBLANK(Stone_Weight__c), ISBLANK(Weight__c))
Error Message	Please fill Required fields
Description	
Created By	KEERTHANA R, 9/17/2025, 8:49 AM
Modified By	KEERTHANA R, 9/17/2025, 8:49 AM

The rule is marked as "Active" with a checkmark. The "Error Location" is set to "Top of Page". The bottom of the screen shows a Windows taskbar with a search bar, various application icons, and system status information including 27°C, light rain, and the date 17-09-2025.

This is a duplicate of the screenshot above, showing the same Salesforce Object Manager interface for the "Item Validation Rule". The browser address bar, page title, and rule details are identical. The Windows taskbar at the bottom also shows the same system information: 27°C, light rain, and the date 17-09-2025.

Gold smith profile :

The screenshot shows the Salesforce Setup interface for the 'Gold Smith' profile. The left sidebar contains a search bar and a navigation menu with 'Users' and 'Profiles'. The main content area displays the profile details and page layouts.

Profile: Gold Smith

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail

Name	Gold Smith
User License	Salesforce
Description	
Created By	KEERTHANA R. 9/17/2025, 8:53 AM
Modified By	KEERTHANA R. 9/17/2025, 8:58 AM

Page Layouts

Standard Object Layouts	Location Group Assignment
Global: Global Layout [View Assignment]	Location Group Assignment Layout [View Assignment]
Email Application: Not Assigned [View Assignment]	Macro: Macro Layout [View Assignment]
Home Page Layout: Home Page Default [View Assignment]	Object Milestone: Object Milestone Layout [View Assignment]
Account: Account Layout [View Assignment]	Operating Hours: Operating Hours Layout [View Assignment]
Alternative Payment Method: Alternative Payment Method Layout [View Assignment]	Opportunity: Opportunity Layout [View Assignment]

Worker profile :

The screenshot shows the Salesforce Setup interface for the 'Worker Profile'. The left sidebar contains a search bar and a navigation menu with 'Users' and 'Profiles'. The main content area displays the profile details and page layouts.

Profile: Worker Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail

Name	Worker Profile
User License	Salesforce Platform
Description	
Created By	KEERTHANA R. 9/17/2025, 9:02 AM
Modified By	KEERTHANA R. 9/17/2025, 9:03 AM

Page Layouts

Standard Object Layouts	Location Group Assignment
Global: Global Layout [View Assignment]	Lead: Lead Layout [View Assignment]
Email Application: Not Assigned [View Assignment]	Location: Location Layout [View Assignment]
Home Page Layout: Home Page Default [View Assignment]	Location Group: Location Group Layout [View Assignment]
Account: Account Layout [View Assignment]	Location Group Assignment: Location Group Assignment Layout [View Assignment]
Alternative Payment Method: Alternative Payment Method Layout [View Assignment]	Object Milestone: Object Milestone Layout [View Assignment]

Created gold smith role :

The screenshot shows the Salesforce Setup interface with the 'Roles' section selected. The 'Gold Smith' role is displayed with the following details:

- Role Name:** Gold Smith
- Label:** Gold Smith
- This role reports to:** CEO
- Modified By:** KEERTHANA.B. 9/17/2025, 8:55 PM
- Opportunity Access:** Users in this role can **edit** all opportunities associated with accounts that they own, regardless of who owns the opportunities
- Case Access:** Users in this role can **edit** all cases associated with accounts that they own, regardless of who owns the cases
- Role Name as displayed on reports:** Gold_Smith
- Sharing Groups:** Role, Role and Internal Subordinates

The 'Users In Gold Smith Role' section shows 'No records to display'.

Created one more role as Worker which reports to gold smith :

The screenshot shows the Salesforce Setup interface with the 'Roles' section selected. The 'Worker' role is displayed with the following details:

- Role Name:** Worker
- Label:** Worker
- This role reports to:** Gold_Smith
- Modified By:** KEERTHANA.B. 9/17/2025, 8:58 PM
- Opportunity Access:** Users in this role can **edit** all opportunities associated with accounts that they own, regardless of who owns the opportunities
- Case Access:** Users in this role can **edit** all cases associated with accounts that they own, regardless of who owns the cases
- Role Name as displayed on reports:** Worker
- Sharing Groups:** Role, Role and Internal Subordinates

The 'Users In Worker Role' section shows 'No records to display'.

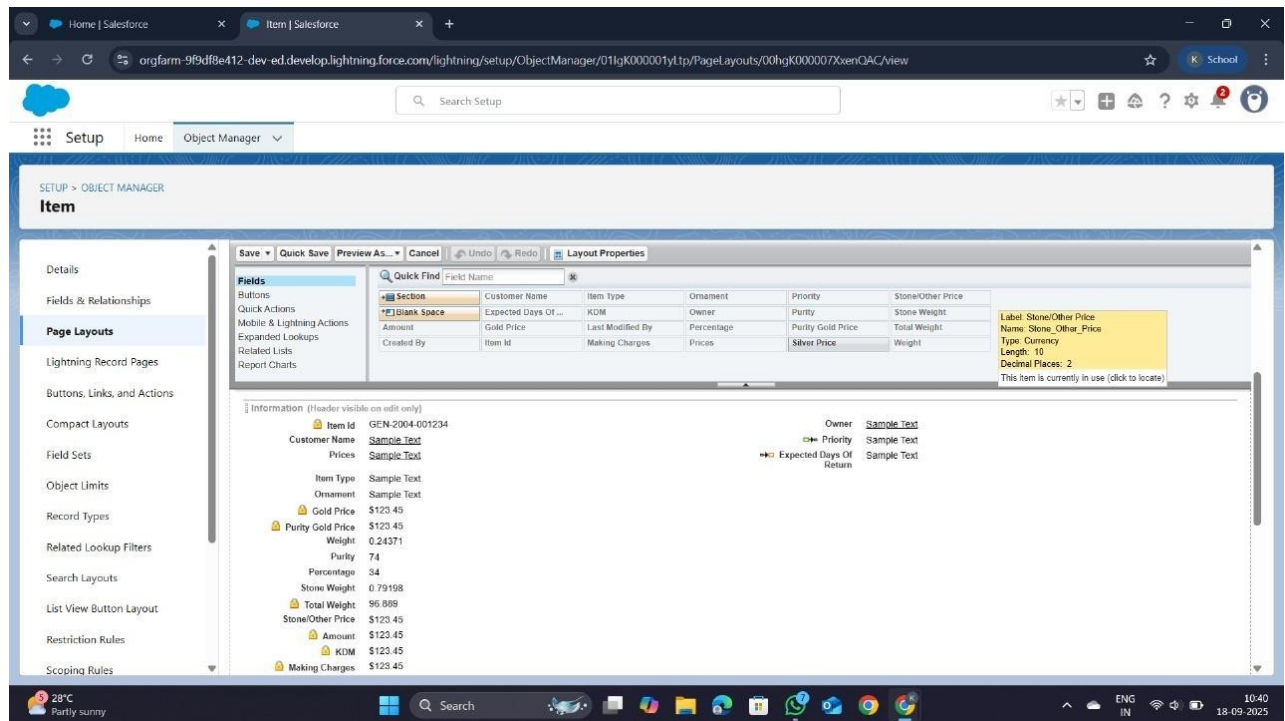
Created user :

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Users' is selected under 'User Management Settings'. The main content area displays the 'User Detail' for 'Niklaus Mikaelson'. The user is active and has the role 'Gold Smith'. The details include:

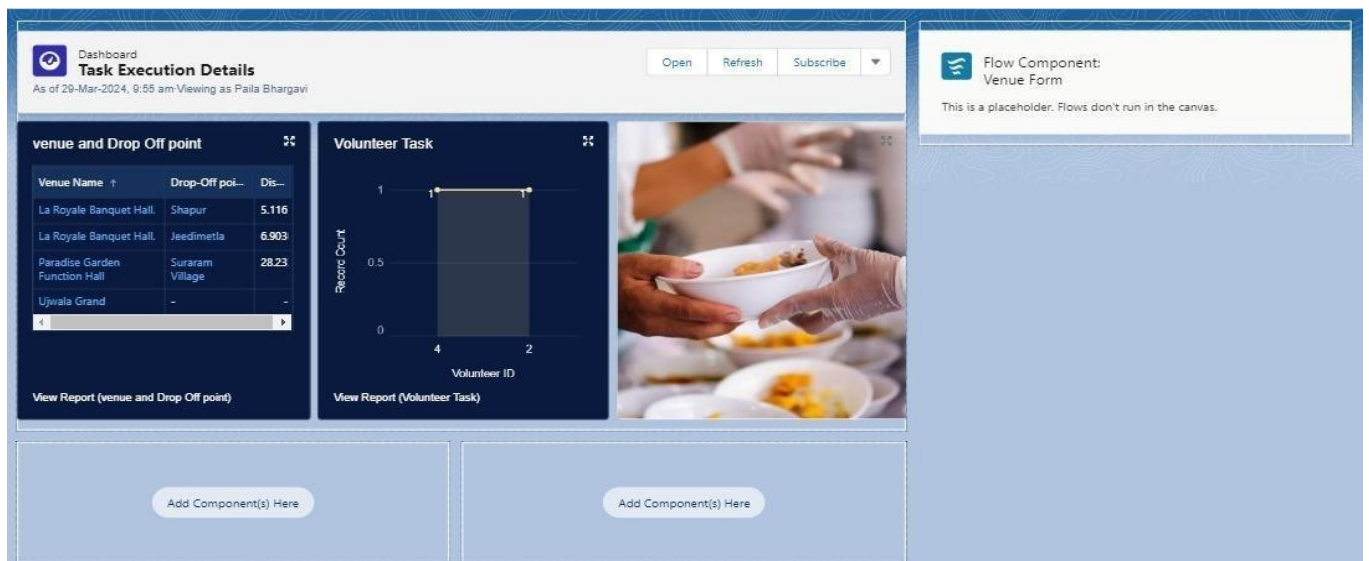
Field	Value
Name	Niklaus Mikaelson
Alias	nmika
Email	keerthana719@gmail.com [Verify]
Username	keerthana719@gmail.com
Nickname	User17581681750685512922
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Locale	English (United States)
Language	English
Delegated Approver	
Manager	
Receive Approval Request Emails	Only if I am an approver
Federation ID	

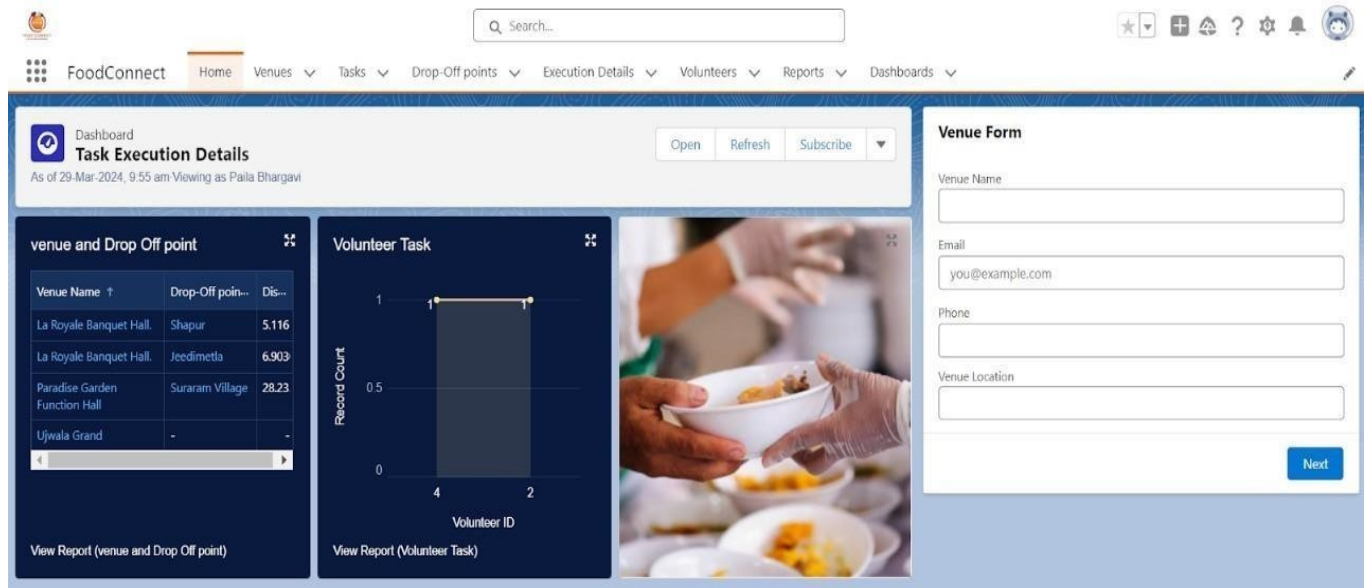
Additional settings on the right include Role (Gold Smith), User License (Salesforce), Profile (Gold Smith), Active (checked), Marketing User (unchecked), Offline User (unchecked), Knowledge User (unchecked), Flow User (unchecked), Service Cloud User (unchecked), Site.com Contributor User (unchecked), Site.com Publisher User (unchecked), WDC User (unchecked), Mobile Push Registrations (View), Data.com User Type (down arrow), Accessibility Mode (Classic Only) (unchecked), Debug Mode (unchecked), and High Contrast Palette on Chrome (unchecked).

Created a gold page layout :



Created a silver page layout :





ADVANTAGES & DISADVANTAGES

Advantages

1. **Efficient Coordination:** Streamlines communication between donors, volunteers, and dropoff points.
2. **Reduces Food Waste:** Helps minimize food waste by redistributing surplus to those in need.
3. **Automation:** Uses Salesforce tools (Flows, Alerts, etc.) to reduce manual work and human error.
4. **Real-Time Tracking:** Provides visibility into task status, pickup/delivery updates, and execution logs.
5. **Social Impact:** Supports hunger relief efforts and strengthens community support systems.

Disadvantages

1. **Technology Dependency:** Requires access to Salesforce and internet connectivity, which may be a barrier in some regions.
2. **Initial Setup Cost:** Implementation and customization on Salesforce can be costly for small organizations.

3. **Volunteer Reliability:** The system depends heavily on volunteers, which can lead to inconsistencies in execution.
4. **Food Safety Risks:** If not handled properly, there can be concerns about the hygiene and safety of leftover food.
5. **Training Requirement:** Users need training to effectively use the system and its automated features.

CONCLUSION

The Leftover Food Supply Management System successfully streamlines the food donation and distribution process through a structured, automated Salesforce application. It enhances efficiency, coordination, and tracking accuracy for donors, volunteers, and administrators, ultimately contributing to reduced food waste and greater community impact.

APPENDIX

- **Source Code:** Provided in Apex Classes and Triggers **trigger**

DropOffTrigger on Drop_Off_point c (before insert) {

for(Drop_Off_point c Drop : Trigger.new){

Drop.Distance c = Drop.distance_calculation c;

—}

