

# **CRM JEWEL MANAGEMENT C**

college: Ayyan thiruvallur College of arts and science

Code : BRU4M

TEAM ID : NM2025TMID27930

TEAM SIZE : 4

## **TEAM MEMBERS:**

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# 1.INTRODUCTION:

## Project Overview

### 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 aimstoprovideanefficientanduser-friendlysolutiontotrackandcontrol the inventory of various jewellery items, maintain accurate records, and facilitate seamless sales transactions.



## Purpose

The JewelGuard CRM application is designed to streamline and optimize jewel management for developers, jewelers, and retailers. Its primary purpose is to:

1. **Track Inventory:** Manage and monitor jewel stock levels, including details like type, quantity, value, and location.
2. **Customer Management:** Store customer information, purchase history, and preferences to enhance customer relationships and targeted marketing.
3. **Sales and Order Management:** Automate sales processes, track orders, and manage invoices and payments.
4. **Reporting and Analytics:** Provide insights into sales trends, inventory levels, and customer behavior to inform business decisions.
5. **Security and Compliance:** Ensure secure storage and handling of sensitive customer and jewel data, adhering to industry regulations.

# I . DEVELOPMENTPHASE

## Creating a Salesforce Developer Account:

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

- Created objects:  
JewelCustomer, Item, CustomerOrder, Price, Billing

SETUP > OBJECT MANAGER

**Jewel Customer**

Details

**Fields & Relationships** 11 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Country	Country__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
Phone	Phone__c	Phone		

SETUP > OBJECT MANAGER

**Item**

Details

**Fields & Relationships** 28 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Billing	Billing__c	Lookup(Billing)		✓
Billings with item and Customer order	Billings_with_item_and_Customer_order__c	Lookup(Billing)		✓
Created By	CreatedById	Lookup(User)		
Customer Name	Customer_Name__c	Text(20)		
Email	Email__c	Email		
Expected Days Of Return	Expected_Days_Of_Return__c	Picklist		

## Customer Order

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

### 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(Customer)		✓
Customer Order Name	Name	Auto Number		✓
Item	Item__c	Master-Detail(Item)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Order Status	Order_Status__c	Picklist		

## Price

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

### 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)		✓
Prices Name	Name	Auto Number		✓
Silver Price	Silver_Price__c	Currency(8, 5)		

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

### Fields & Relationships

18 Items, Sorted by Field Label

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Billing Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Customer Name	Customer_Name__c	Text(20)		
Email	Email__c	Email		
Gold/Silver Price	Gold_Silver_Price__c	Formula (Currency)		
Item	Item__c	Lookup(Item)		✓

- **Creating Custom Tabs:**

JewelCustomer, Item, CustomerOrder, Price, Billing.

SETUP

## Tabs

Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

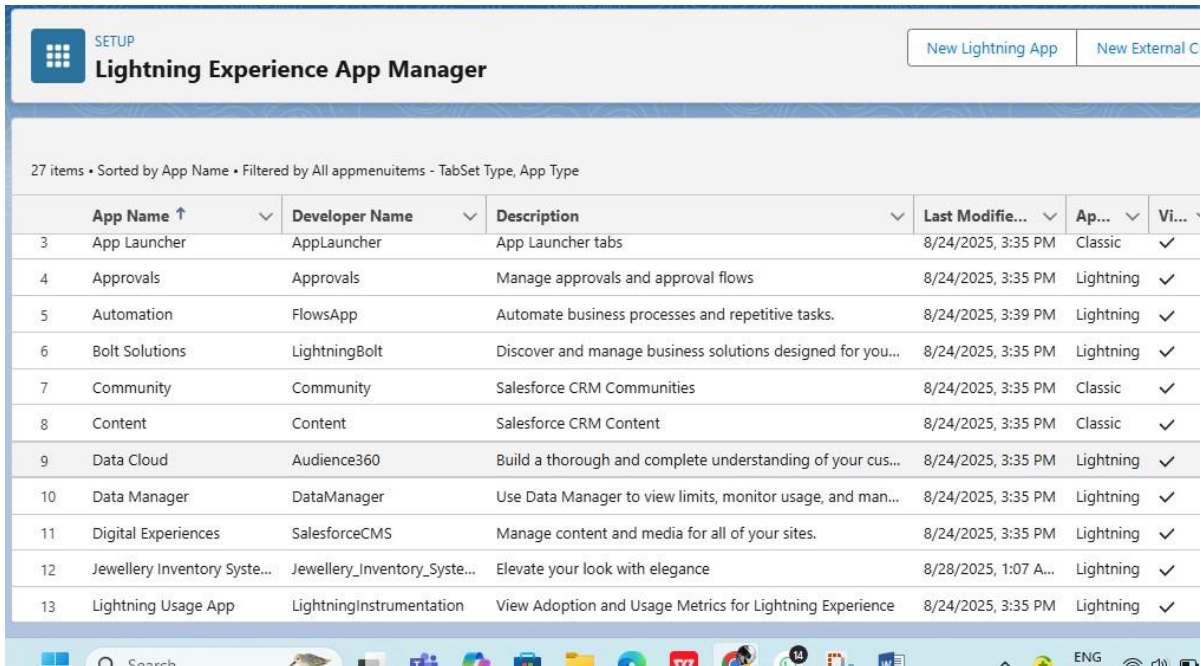
New What Is This?

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Assets</a>	Radar dish	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Asset Services</a>	Jewel	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Billings</a>	Trophy	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Customer Orders</a>	Hands	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Employees</a>	Star	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Items</a>	Heart	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Jewel Customers</a>	Moon	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Prices</a>	Locked	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Projects</a>	Headset	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">ProjectTasks</a>	Stopwatch	

Web Tabs

New What Is This?

## II . Createa LightningApp



27 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

	App Name ↑	Developer Name	Description	Last Modifie...	Ap...	Vi...
3	App Launcher	AppLauncher	App Launcher tabs	8/24/2025, 3:35 PM	Classic	✓
4	Approvals	Approvals	Manage approvals and approval flows	8/24/2025, 3:35 PM	Lightning	✓
5	Automation	FlowsApp	Automate business processes and repetitive tasks.	8/24/2025, 3:39 PM	Lightning	✓
6	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for you...	8/24/2025, 3:35 PM	Lightning	✓
7	Community	Community	Salesforce CRM Communities	8/24/2025, 3:35 PM	Classic	✓
8	Content	Content	Salesforce CRM Content	8/24/2025, 3:35 PM	Classic	✓
9	Data Cloud	Audience360	Build a thorough and complete understanding of your cus...	8/24/2025, 3:35 PM	Lightning	✓
10	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and man...	8/24/2025, 3:35 PM	Lightning	✓
11	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	8/24/2025, 3:35 PM	Lightning	✓
12	Jewellery Inventory Syste...	Jewellery_Inventory_Syste...	Elevate your look with elegance	8/28/2025, 1:07 A...	Lightning	✓
13	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	8/24/2025, 3:35 PM	Lightning	✓

## III . ConfiguredFieldsandRelationships

### 1.JewelCustomer

#### Fieldsin JewelCustomer

- Country
- State
- Phone
- Email
- Zip/Postalcode
- Street
- City

SETUP > OBJECT MANAGER

**Jewel Customer**

Details	<b>Fields &amp; Relationships</b> 11 Items, Sorted by Field Label					Q Quick Find	New	Deleted Fields	Field Dependencies	Set History Tracking
<b>Fields &amp; Relationships</b>	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED					
Page Layouts	City	City__c	Text(20)							
Lightning Record Pages	Country	Country__c	Text(18)							
Buttons, Links, and Actions	Created By	CreatedById	Lookup(User)							
Compact Layouts	Email	Email__c	Email							
Field Sets	Jewel Customer Name	Name	Text(80)		✓					
Object Limits	Last Modified By	LastModifiedById	Lookup(User)							
Record Types	Owner	OwnerId	Lookup(User,Group)		✓					
Related Lookup Filters										
Search Layouts										

## 2. Item

### Fields in item

- CustomerName
- Ornaments
- Weight
- StoneWeight
- Percentage
- Stine/OtherPrice
- ExpecteddaysofReturn
- Priority
- SilverPrice
- PurityGoldPrice
- TotalWeight
- Amount
- KDM
- MakingCharges



SETUP > OBJECT MANAGER

**Item**

Details	<b>Fields &amp; Relationships</b> 23 Items, Sorted by Field Label					Q Quick Find	New	Deleted Fields	Field Dependencies	Set History Tracking
<b>Fields &amp; Relationships</b>	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED					
Page Layouts	Amount	Amount__c	Formula (Currency)							
Lightning Record Pages	Created By	CreatedById	Lookup(User)							
Buttons, Links, and Actions	Customer Name	Customer_Name__c	Lookup(Jewel Customer)		✓					
Compact Layouts	Expected Days Of Return	Expected_Days_Of_Return__c	Picklist	Priority						
Field Sets	Gold Price	Gold_Price__c	Formula (Currency)							
Object Limits	Item Id	Name	Auto Number		✓					
Record Types	Item Type	Item_Type__c	Picklist							
Related Lookup Filters										
Search Layouts										

### 3.CustomerOrder

#### FieldsinCustomerOrder

- OrderStatus

SETUP > OBJECT MANAGER

**Customer Order**

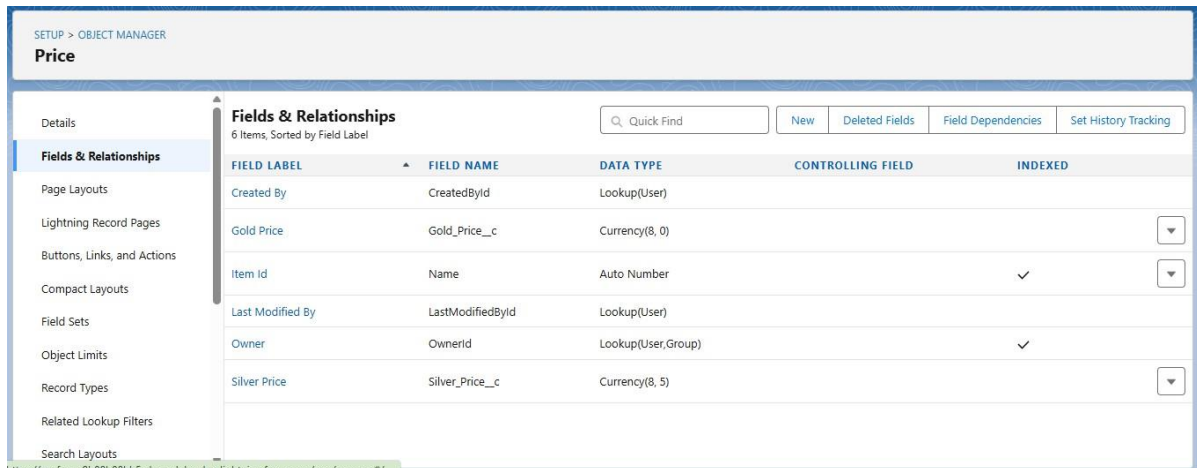
Details	<b>Fields &amp; Relationships</b> 6 Items, Sorted by Field Label					Q Quick Find	New	Deleted Fields	Field Dependencies	Set History Tracking
<b>Fields &amp; Relationships</b>	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED					
Page Layouts	Created By	CreatedById	Lookup(User)							
Lightning Record Pages	Customer	Customer__c	Lookup(Jewel Customer)		✓					
Buttons, Links, and Actions	Item	Item__c	Master-Detail(Item)		✓					
Compact Layouts	Item Id	Name	Auto Number		✓					
Field Sets	Last Modified By	LastModifiedById	Lookup(User)							
Object Limits	Order Status	Order_Status__c	Picklist							
Record Types										
Related Lookup Filters										
Search Layouts										

<https://orafarm-9b88b88bb5-dev-ed.develop.lightning.force.com/one/one.aop#/...>

### 4.Price

#### FieldsinPrices

- GoldPrice
- SilverPrice



## 5. Billing

### Fields in Billing

- CustomerName
- Ornaments
- Weight
- StoneWeight
- Percentage
- Stine/OtherPrice
- ExpecteddaysofReturn
- Priority
- SilverPrice
- PurityGoldPrice
- TotalWeight
- Amount
- KDM
- MakingCharges

SETUP > OBJECT MANAGER				
Billing				
Details	Fields & Relationships			
Fields & Relationships	16 Items, Sorted by Field Label			
Page Layouts	<input type="text" value="Q, Quick Find"/> <input type="button" value="New"/> <input type="button" value="Deleted Fields"/> <input type="button" value="Field Dependencies"/> <input type="button" value="Set History Tracking"/>			
Lightning Record Pages	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Buttons, Links, and Actions	Amount	Amount__c	Formula (Currency)	
Compact Layouts	Created By	CreatedById	Lookup(User)	
Field Sets	Gold/Silver Price	Gold_Silver_Price__c	Formula (Currency)	
Object Limits	Item	Item__c	Lookup(Item)	✓
Record Types	Item Id	Name	Auto Number	✓
Related Lookup Filters	KDM Charge	KDM_Charge__c	Formula (Currency)	
Search Layouts	Last Modified By	LastModifiedById	Lookup(User)	

To create a Field Dependencies in item object

SETUP > OBJECT MANAGER

Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Item Field Dependencies

[Back to Custom Object: Item](#)

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

Field Dependencies

New

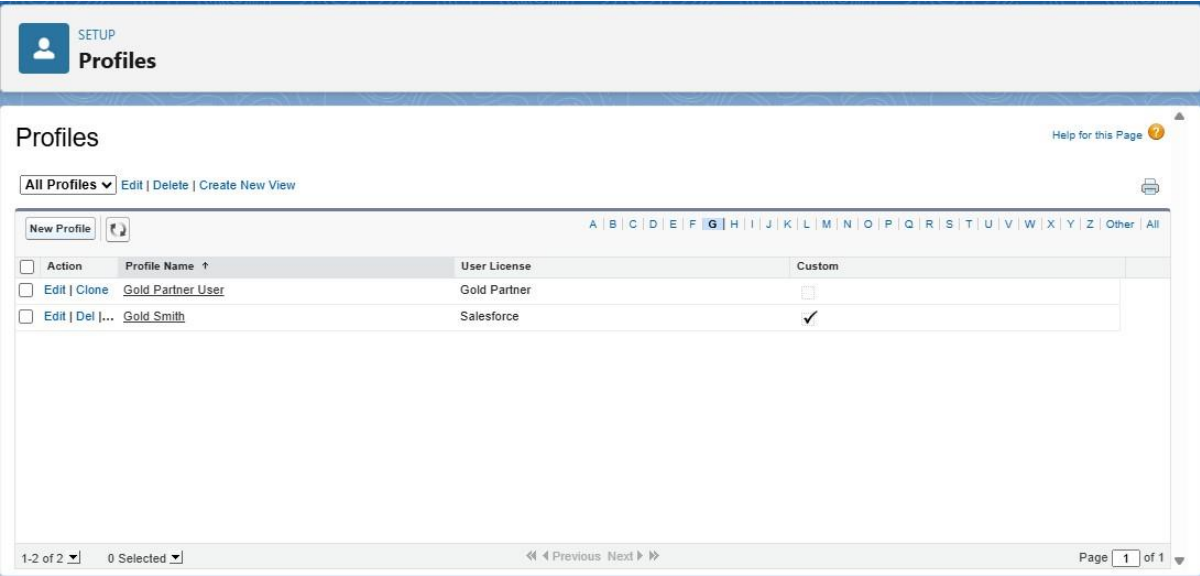
Action	Controlling Field	Dependent Field	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Priority</a>		Expected Days Of Return	Harish V, 9/2/2025, 11:12 PM

Help for this Page

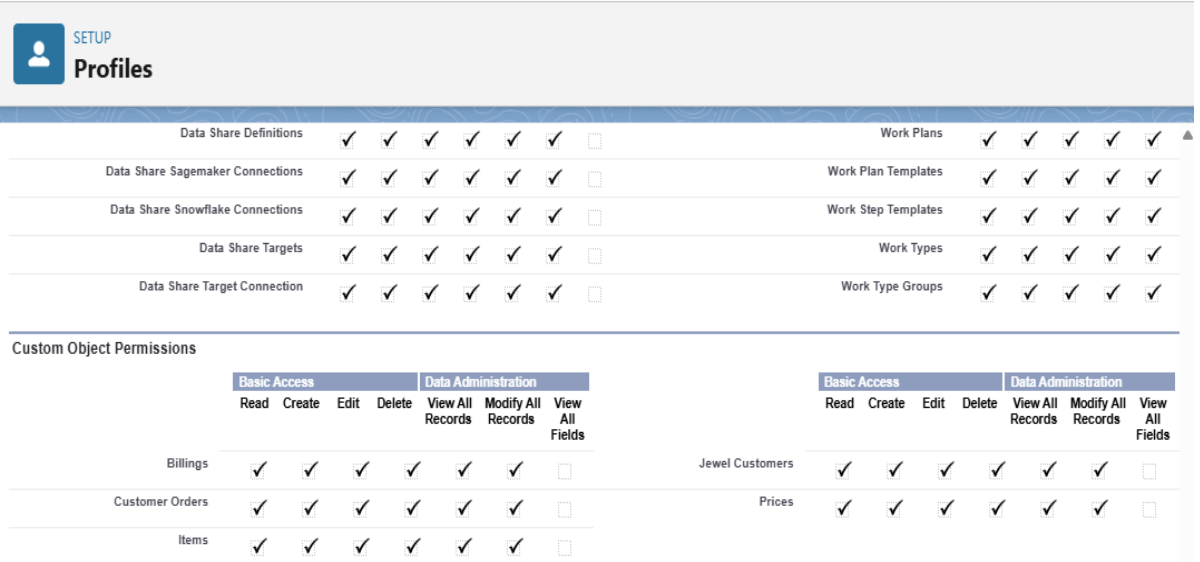
To create a Validation Rules in Jewel Customer object

SETUP > OBJECT MANAGER				
Jewel Customer				
Details	Validation Rules			
Fields & Relationships	1 Items, Sorted by Rule Name <input type="button" value="New"/>			
Page Layouts	RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE
Lightning Record Pages	Postal_Code	Top of Page	Must contain 6 digits", select the Error location as Field and select the field as "Zip/Postal code"	✓
Buttons, Links, and Actions	Modified By			
Compact Layouts	Harish V, 9/2/2025, 11:21 PM			
Field Sets				
Object Limits				
Record Types				
Related Lookup Filters				
Search Layouts				


# IV . CreateaGoldSmithProfile



## SelectthisinCustomObject Permissions




## V . Createa Worker Profile

 **SETUP**  
**Profiles**

### Profiles

Help for this Page ?

All Profiles ▾ Edit | Delete | Create New View

New Profile 

A B C D E F G H I J K L M N O P Q R S T U V **W** X Y Z Other All

<input type="checkbox"/>	Action	Profile Name ↑	User License	Custom
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Work.com Only User</a>	Work.com Only	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   ...	<a href="#">Worker</a>	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   ...	<a href="#">Worker Profile</a>	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   ...	<a href="#">Workers</a>	Salesforce Platform	<input checked="" type="checkbox"/>

1-4 of 4 ▾ 0 Selected ▾ << < Previous Next >> Page 1 of 1 ▾

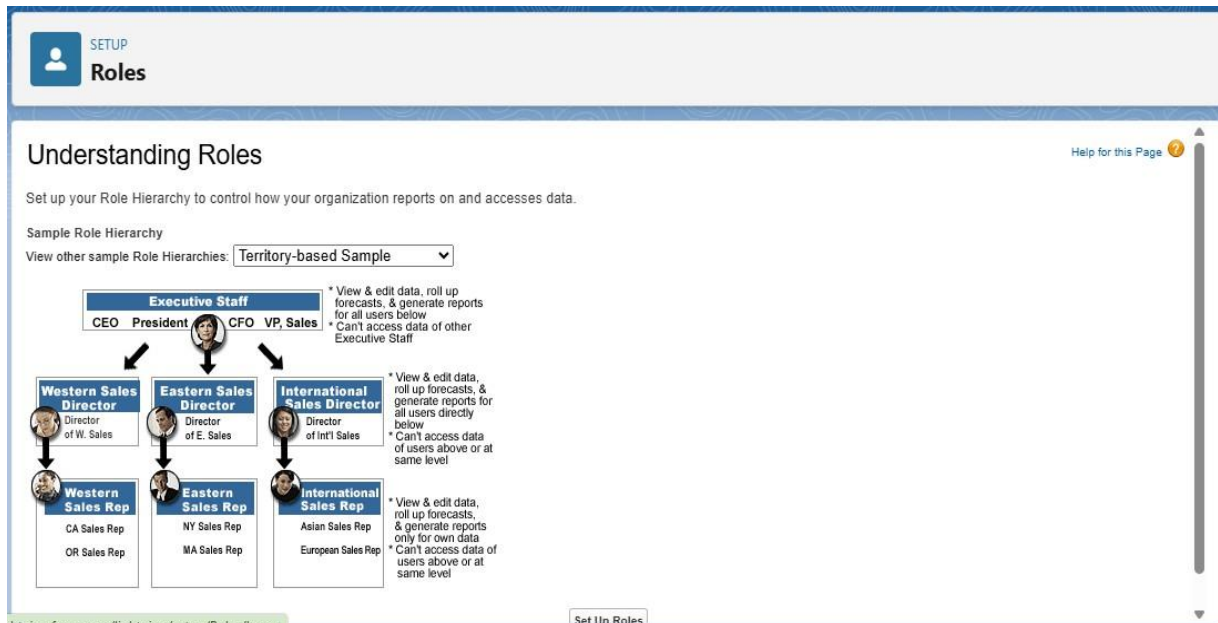
## SelectthisinCustomObjectPermissions

### Custom Object Permissions

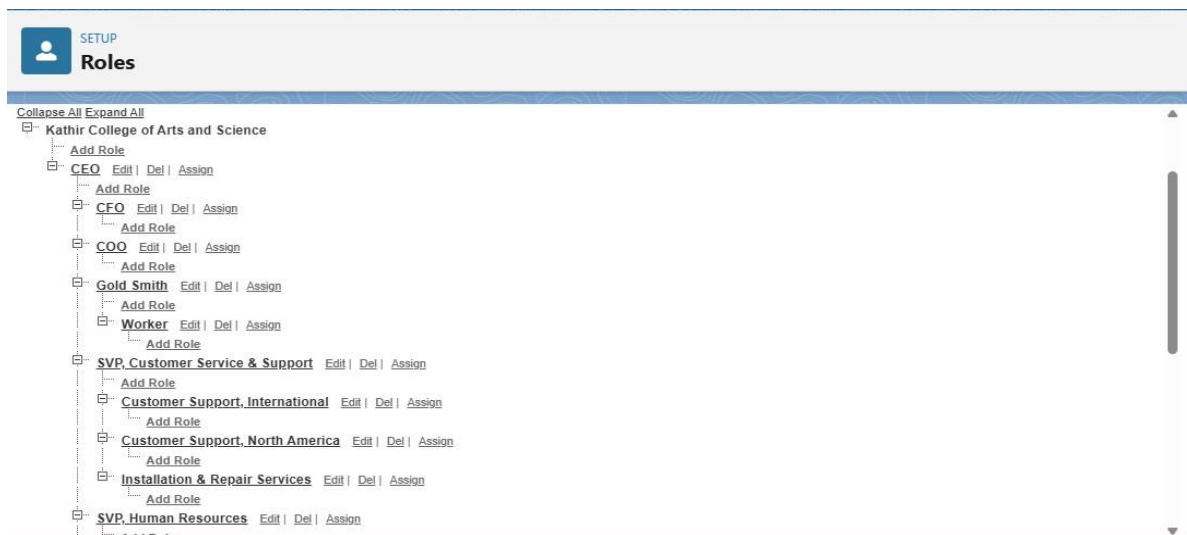
	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Billings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Items	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Jewel Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Prices	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

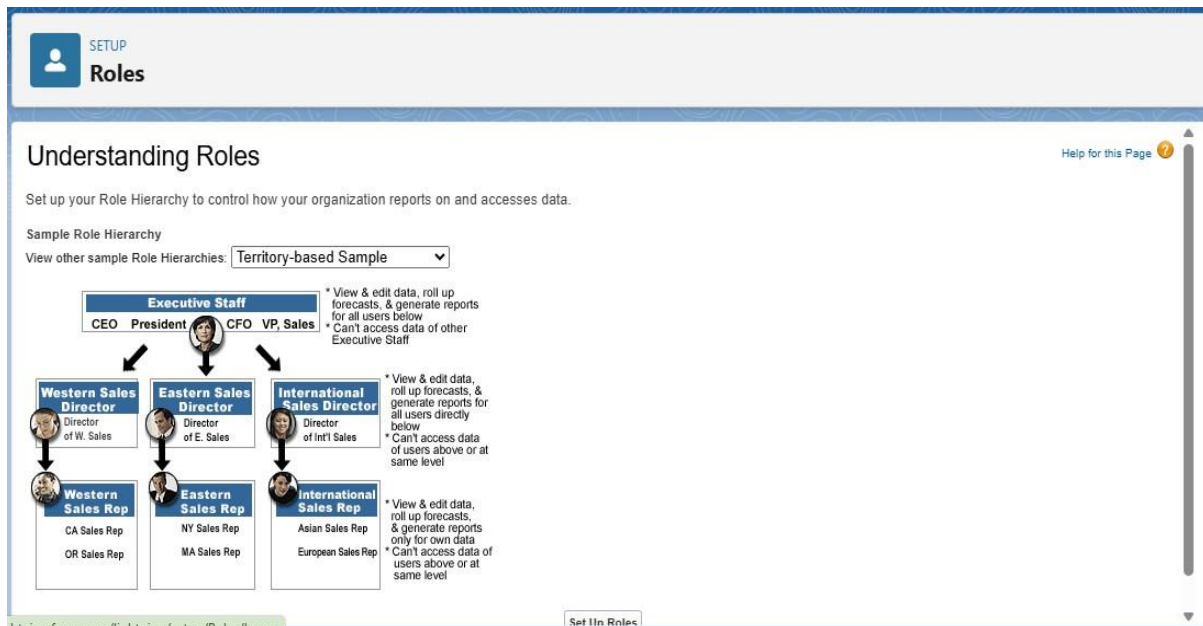
## VI . Creating Role for GoldSmith



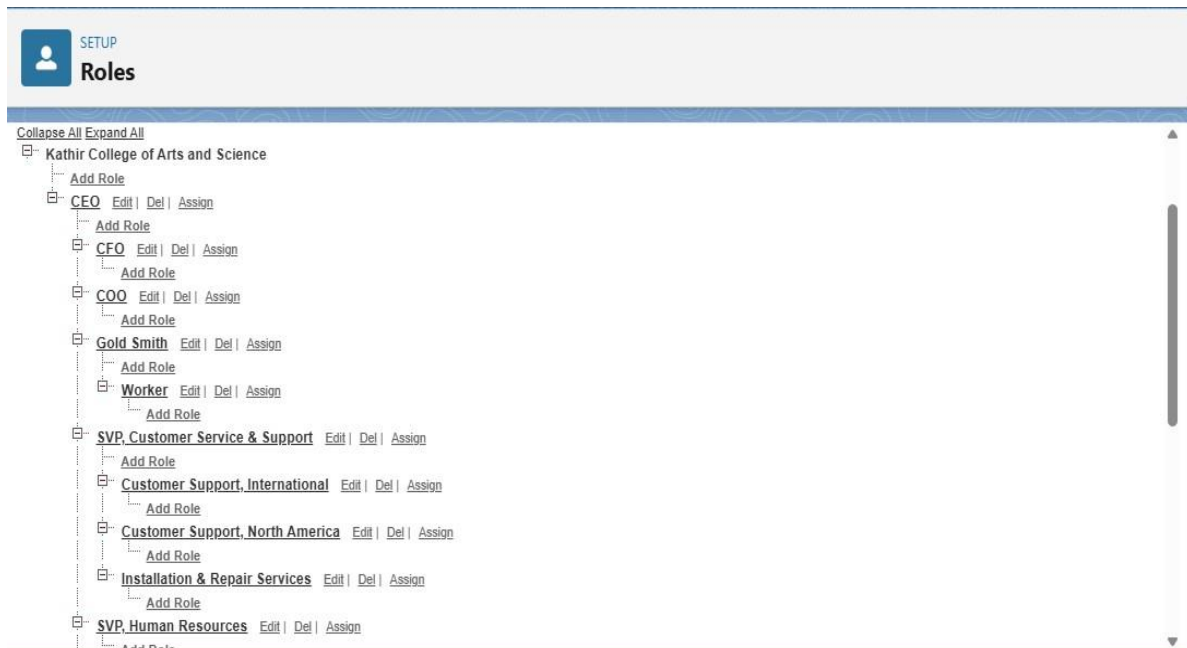
### ➤ Role is Created for Gold Smith



## VII . CreatingRolefor Worker

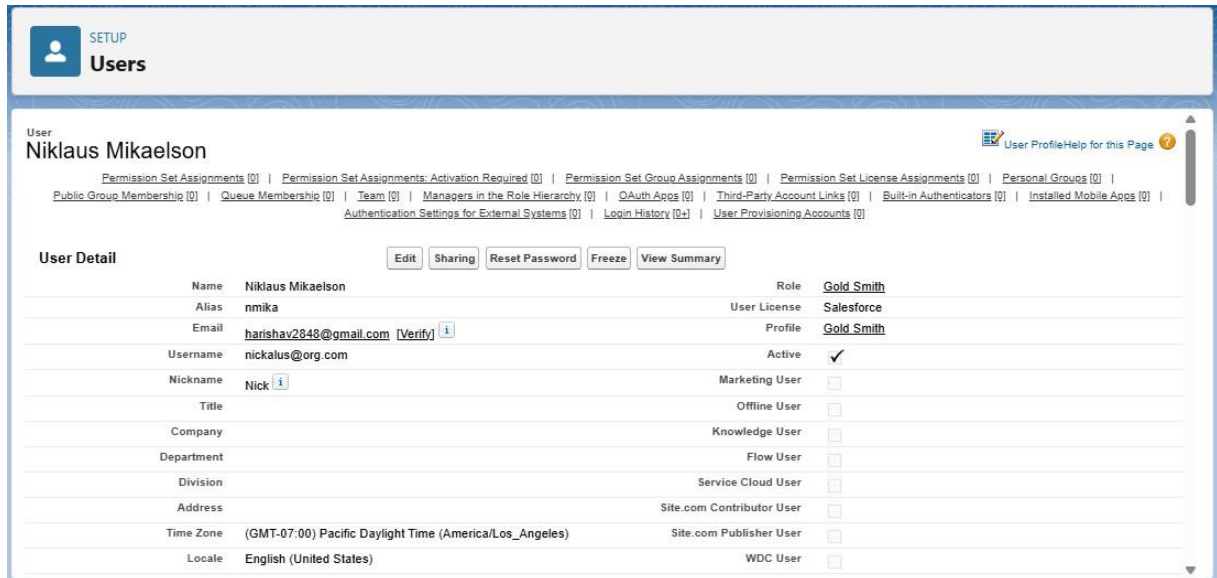


### ➤ RoleisCreatedforWorker



## VIII . CreatingUser

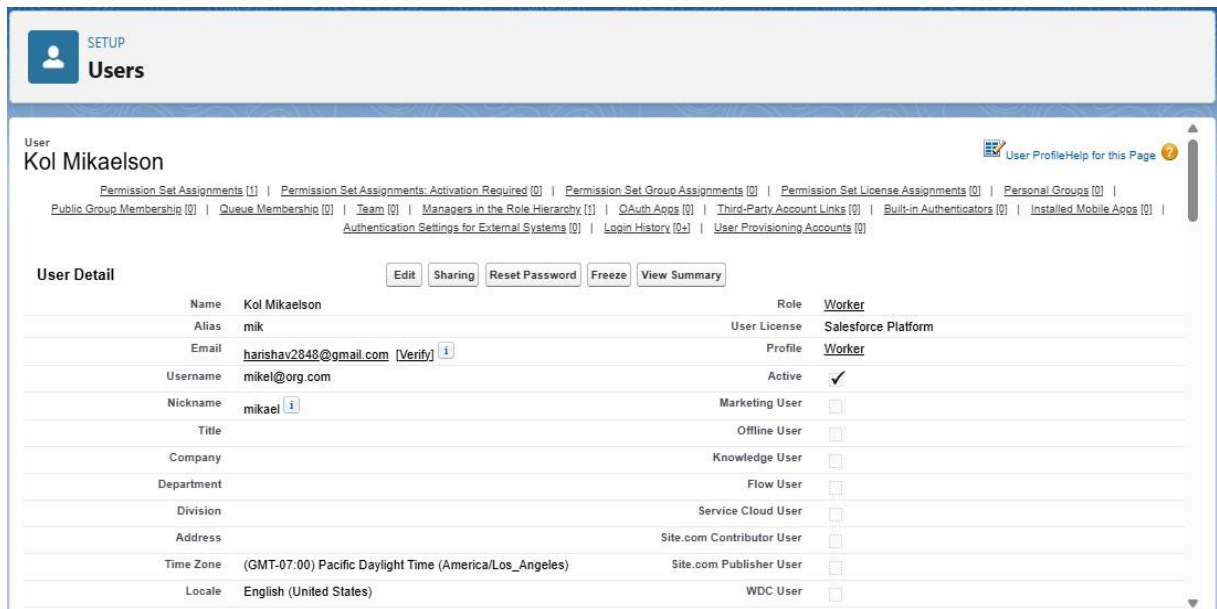
### ➤ CreatinguserwiththeRoleasaGoldSmith



The screenshot shows the Salesforce 'Users' setup page for a user named Niklaus Mikaelson. The user's role is 'Gold Smith'. The 'User Detail' section includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, and Locale. The 'Role' field is set to 'Gold Smith', and the 'User License' is 'Salesforce'. The 'Profile' is 'Gold Smith'. The 'Active' checkbox is checked. The 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', and 'WDC User' checkboxes are all unchecked.

Field	Value	Field	Value
Name	Niklaus Mikaelson	Role	Gold Smith
Alias	nmika	User License	Salesforce
Email	harishav2848@gmail.com [Verify]	Profile	Gold Smith
Username	nickalus@org.com	Active	<input checked="" type="checkbox"/>
Nickname	Nick	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"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>

### ➤ CreatinguserwiththeRoleasa Worker



The screenshot shows the Salesforce 'Users' setup page for a user named Kol Mikaelson. The user's role is 'Worker'. The 'User Detail' section includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, and Locale. The 'Role' field is set to 'Worker', and the 'User License' is 'Salesforce Platform'. The 'Profile' is 'Worker'. The 'Active' checkbox is checked. The 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', and 'WDC User' checkboxes are all unchecked.

Field	Value	Field	Value
Name	Kol Mikaelson	Role	Worker
Alias	mik	User License	Salesforce Platform
Email	harishav2848@gmail.com [Verify]	Profile	Worker
Username	mikel@org.com	Active	<input checked="" type="checkbox"/>
Nickname	mikael	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"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>

### ➤ Createtwomoreusersaswiththesameroleasworker



## IX . CreatingPageLayouts

### ○ CreatingpageLayoutforGold

SETUP > OBJECT MANAGER

**Item**

Details

Fields & Relationships

**Page Layouts**

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

**Page Layouts**  
3 Items, Sorted by Page Layout Name

Q Quick Find

New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Item Layout	Harish V, 9/2/2025, 9:52 PM	Harish V, 9/8/2025, 10:00 AM	▼
Page Layout for Gold	Harish V, 9/3/2025, 1:41 AM	Harish V, 9/8/2025, 10:25 AM	▼
Page Layout for Silver	Harish V, 9/8/2025, 10:20 AM	Harish V, 9/8/2025, 10:26 AM	▼

SETUP > OBJECT MANAGER

**Item**

Details

Fields & Relationships

**Page Layouts**

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

Section	Customer Name	Item Type	Ornament	Priority	Silver Price	Weight
Blank Space	Expected Days Of ...	KDM	Owner	Purity	Stone/Other Price	
Amount	Gold Price	Last Modified By	Percentage	Purity Gold Price	Stone Weight	
Created By	Item Id	Making Charges	Prices	Record Type	Total Weight	

Item Id GEN-2004-001234

Customer Name Sample Text

Prices Sample Text

Item Type Sample Text

Ornament Sample Text

Gold Price \$123.45

Purity Gold Price \$123.45

Weight 0.78561

Purity 19

Percentage 97

Stone Weight 0.42681

Total Weight \$1.436

Stone/Other Price \$123.45

Priority Sample Text

Expected Days Of Return Sample Text

## ○ CreatingpageLayoutfor Silver

SETUP > OBJECT MANAGER

### Item

Details

Fields & Relationships

**Page Layouts**

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

**Page Layouts**

3 Items, Sorted by Page Layout Name

Q Quick Find

New

Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Item Layout	Harish V, 9/2/2025, 9:52 PM	Harish V, 9/8/2025, 10:00 AM	▼
Page Layout for Gold	Harish V, 9/3/2025, 1:41 AM	Harish V, 9/8/2025, 10:25 AM	▼
Page Layout for Silver	Harish V, 9/8/2025, 10:20 AM	Harish V, 9/8/2025, 10:26 AM	▼

SETUP > OBJECT MANAGER

### Item

Details

Fields & Relationships

**Page Layouts**

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Q Quick Find

Field Name

\*

Section	Customer Name	Item Type	Ornament	Priority	Silver Price	Weight
Blank Space	Expected Days Of ...	KDM	Owner	Purity	Stone/Other Price	
Amount	Gold Price	Last Modified By	Percentage	Purity Gold Price	Stone Weight	
Created By	Item Id	Making Charges	Prices	Record Type	Total Weight	

GEN-2004-001234

Customer Name

Sample Text

Prices

Sample Text

Item Type

Sample Text

Ornament

Sample Text

Silver Price

6.250

Weight

0.67426

Stone Weight

0.29928

Stone/Other Price

\$123.45

Total Weight

40.329

Percentage

55

Amount

\$123.45

KDM

\$123.45

Priority

Sample Text

Expected Days Of Return

Sample Text

## X . CreatingRecordType

✓ CreaterecordtypeforGold

SETUP > OBJECT MANAGER

**Item**

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

**Record Types**

Related Lookup Filters

Search Layouts

**Record Types**

2 Items, Sorted by Record Type Label

Quick Find

New

Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	Harish V, 9/8/2025, 10:37 AM
Silver	Silver items information	✓	Harish V, 9/8/2025, 10:41 AM

SETUP > OBJECT MANAGER

**Item**

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

Record Type

**Gold**

Help for this Page

« 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	Gold	Active	✓
Record Type Name	Gold		
Namespace Prefix			
Description	Gold items information		
Created By	Harish V, 9/8/2025, 10:37 AM	Modified By	Harish V, 9/8/2025, 10:37 AM

**Picklists Available for Editing**

Picklists Available for Editing Help

Action	Field	Modified Date
Edit	Expected Days Of Return	9/8/2025, 10:37 AM
Edit	Item Type	9/8/2025, 10:37 AM
Edit	Priority	9/8/2025, 10:37 AM

## ✓ CreateRecordtypefor Silver

SETUP > OBJECT MANAGER

### Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

**Record Types**

Related Lookup Filters

Search Layouts

**Record Types**

2 Items, Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	Harish V, 9/8/2025, 10:37 AM
Silver	Silver items information	✓	Harish V, 9/8/2025, 10:41 AM

SETUP > OBJECT MANAGER

### Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

**Record Types**

Related Lookup Filters

Search Layouts

**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.

Record Type Label	Silver	Active	✓
Record Type Name	Silver		
Namespace Prefix			
Description	Silver items information		
Created By	Harish V, 9/8/2025, 10:41 AM	Modified By	Harish V, 9/8/2025, 10:41 AM

**Picklists Available for Editing**

[Picklists Available for Editing Help](#)

Action	Field	Modified Date
<a href="#">Edit</a>	Expected Days Of Return	9/8/2025, 10:41 AM
<a href="#">Edit</a>	Item Type	9/8/2025, 10:41 AM
<a href="#">Edit</a>	Priority	9/8/2025, 10:41 AM

## XI . Creatingpermissionset

**Permission Sets**

On this page you can create, view, and manage permission sets.

**All Permission Sets** | Edit | Delete | Create New View

**New** | **Filter** | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Action	Permission Set Name	Description	License
Clone	(Legacy) Data Cloud Data Aware Specialist	This Data Cloud permission set will be deprecated in Spring ...	Customer Data Platform
Clone	(Legacy) Data Cloud Marketing Admin	Allows access to Data Cloud Setup if the user is also a Sale...	Customer Data Cloud for Marketing
Clone	(Legacy) Data Cloud Marketing Manager	This Data Cloud permission set will be deprecated in Spring ...	Customer Data Platform
Clone	(Legacy) Data Cloud Marketing Specialist	This Data Cloud permission set will be deprecated in Spring ...	Customer Data Platform
Clone	(Legacy) Data Cloud for Marketing Data Aware Specialist	This Data Cloud permission set will be deprecated in Spring ...	Customer Data Cloud for Marketing
Clone	(Legacy) Data Cloud for Marketing Manager	This Data Cloud permission set will be deprecated in Spring ...	Customer Data Cloud for Marketing
Clone	(Legacy) Data Cloud for Marketing Specialist	This Data Cloud permission set will be deprecated in Spring ...	Customer Data Cloud for Marketing
Clone	Access Agentforce Default Agent	Gives users access to the default Agentforce agent in Salesf...	Agentforce (Default)
Clone	Agent Platform Builder	Allow access to agent platform.	Agent platform builder

1-25 of 85 | 0 Selected | Previous | Next | Page 1 of 4

✓ CreatealabelnameasaPerto worker

**Apps**

**Assigned Apps**  
Settings that specify which apps are visible in the app menu

**Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu

**Object Settings**  
Permissions to access objects and fields, and settings such as tab availability

**App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"

**Apex Class Access**  
Permissions to execute Apex classes

**Visualforce Page Access**  
Permissions to execute Visualforce pages

**External Data Source Access**  
Permissions to authenticate against external data sources

**Flow Access**  
Permissions to execute Flows

**Named Credential Access**  
Permissions to authenticate against named credentials

**External Credential Principal Access**

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform  
[Learn More](#)

- ✓ ThenClickontheObject Setting.
- ✓ EnabletheGoldandSilverinobjectpermission.

**SETUP**  
**Permission Sets**

Items Edit

**Tab Settings**

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/> <span>i</span>

**Item: Record Type Assignments**

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

**Object Permissions**

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

- ✓ Click on save the permission and click on the Manage assignment
- ✓ Now click on the Add Assignment.

**All Users** ▾

8 items • Sorted by Full Name • Filtered by All users • Updated a few seconds ago

⚙️ 🔄 🔍

<input type="checkbox"/>	Full Name ↑	Al...	Username	Role	A...	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00dggk00000afngiua5.wzwlddjkezhq@chatter.salesf...		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Harish V	har	harishav2848526@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Integration User	integ	integration@00dggk00000afngiua5.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration Us...
<input type="checkbox"/>	Kol Mikaelson	mik	mikel@org.com	Worker	<input checked="" type="checkbox"/>	Worker
<input type="checkbox"/>	mohammed Ali	mali	ali26@org.com	Worker	<input checked="" type="checkbox"/>	Worker
<input type="checkbox"/>	Niklaus Mikaelson	nmika	nickalus@org.com	Gold Smith	<input checked="" type="checkbox"/>	Gold Smith

Cancel Next

- ✓ Select the user you created in the previous milestone.
- ✓ Then click on next and click on Assign.

... > SETUP > PERMISSION SET 'PER TO WORKER'

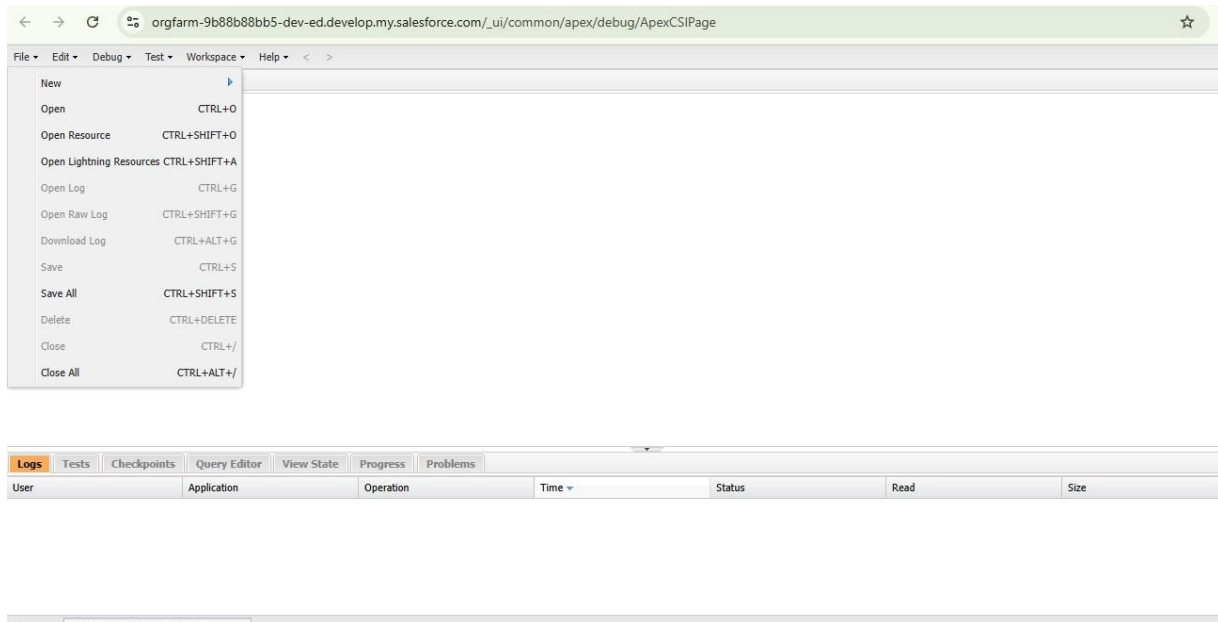
**Per to Worker**

**Current Assignments** ✎ 🗑 Add Assignment

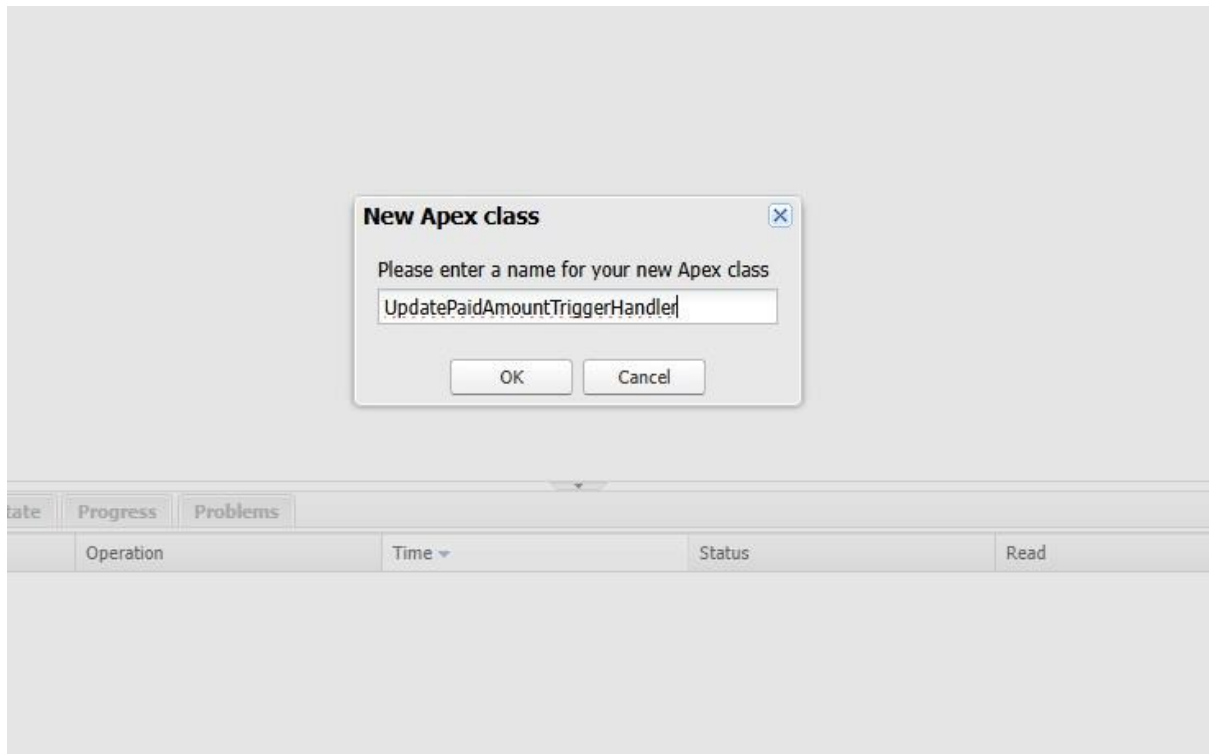
<input type="checkbox"/> Full Name ↑	Active	Role ↑	Profile	User License	Expires On
<input type="checkbox"/> Kol Mikaelson	✓	Worker	Worker	Salesforce Platform	

## XII . Creating Trigger

- ✓ Open the Developer Console in new tab



- ✓ Click on file select "NEW".
- ✓ Select the file as "Apex Classes"
- ✓ Enter the Name as "UpdatePaidAmountTriggerHandler"



✓ In this Apex Class Enter the Code given below:

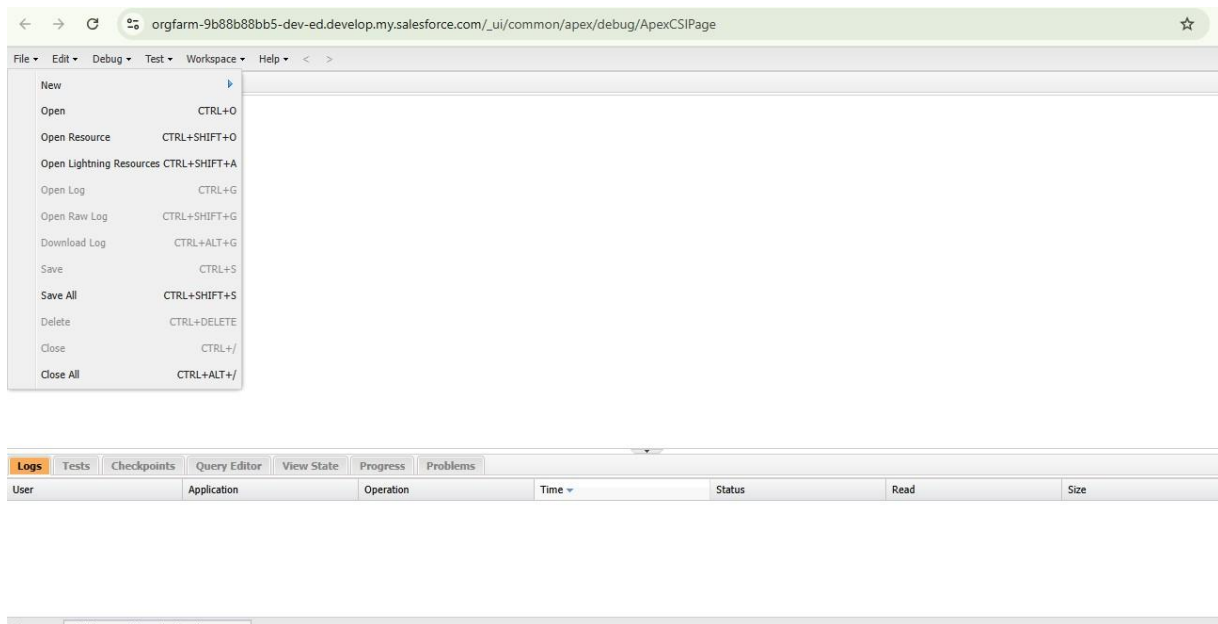
```
public class UpdatePaidAmountTriggerHandler {
    public static void handleBeforeInsert(List<Billing
    _____c>
    newBillings) {
        for (Billing__c billing : newBillings) {
            billing.Paid_Amount__c = billing.Paying_Amount__c;
        }
    }

    public static void handleBeforeUpdate(Map<Id, Billing
    _____c> oldBillingsMap,
    List<Billing_____c> updatedBillings) {
        for (Billing__c billing : updatedBillings) {
            Billing__c oldBilling = oldBillingsMap.get(billing.Id);
            Decimal oldPaidAmount = oldBilling.Paid_Amount__c;
            billing.Paid_Amount__c = oldPaidAmount +
            billing.Paying_Amount__c;
        }
    }
}
```

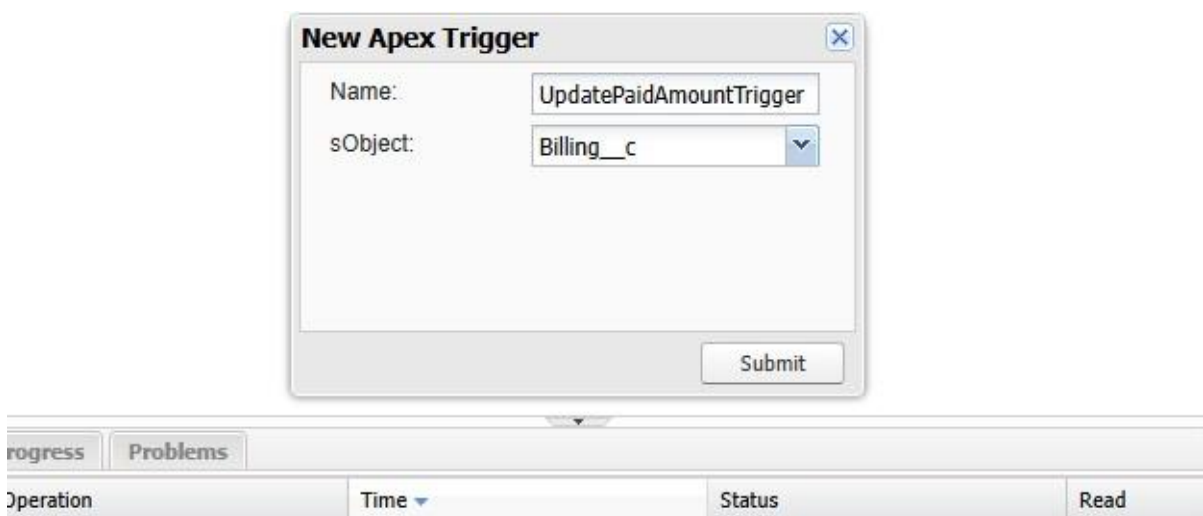


}

## Create another Trigger with the “Apex Trigger”



- ✓ Click On file Select “NEW”.
- ✓ Select the file as “Apex Trigger”
- ✓ Enter the Name as “UpdatePaidAmountTriggerHandler”.
- ✓ Select the Object as “Billing\_c”



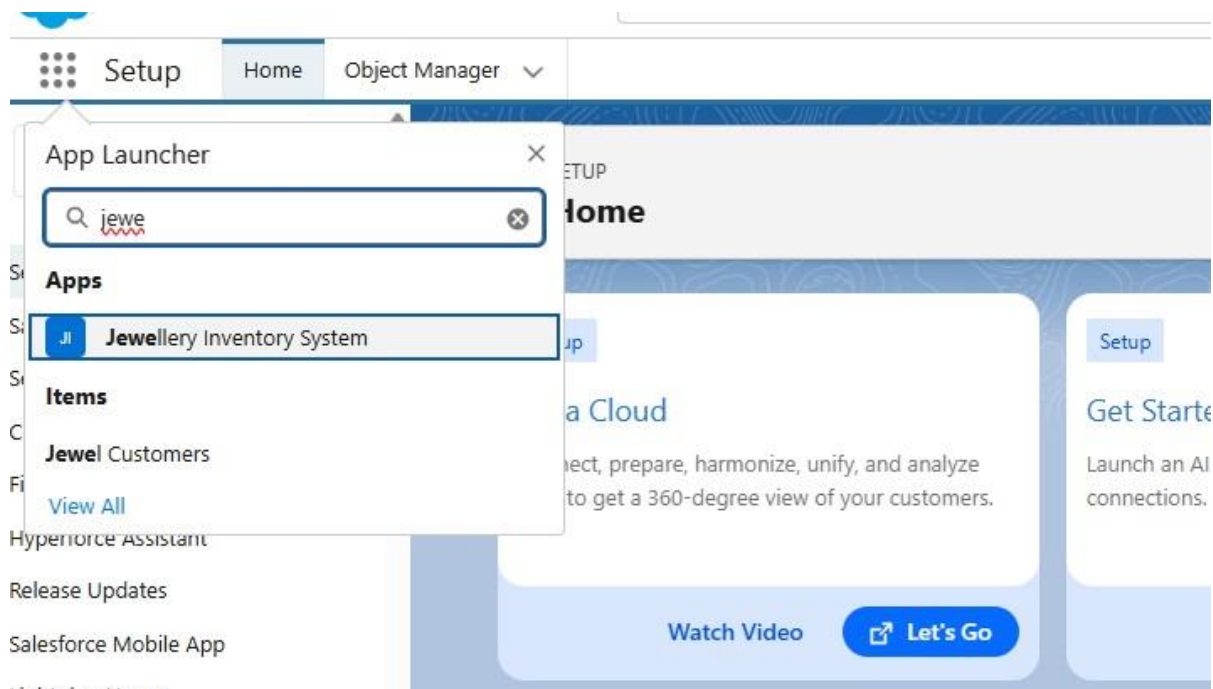
✓ Enter the code given below:

```
trigger UpdatePaidAmountTrigger on Billing__c(beforeinsert,beforeupdate){ if
  (Trigger.isInsert) {
    UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);
  } else if (Trigger.isUpdate) {
    UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap,
    Trigger.new);
  }
}
```

## XIII . User Adoption

### Create a Record(Jewel Customer)

- ✓ Click on App launcher.
- ✓ Search Jewelry Inventory System & click on it.



## XIV . View theJewelryCustomer

- ✓ ClickontheJewelCustomer Tab.
- ✓ Clickon “NEW”
- ✓ Clickonanyrecordname.youcanseethedetailsoftheJewelCustomer.

The screenshot shows a 'New Jewel Customer' form. The 'Jewel Customer Name' field is highlighted with a yellow background and contains the text 'sabarish'. The 'Owner' field shows a profile picture and the name 'Harish V'. The form has several input fields for 'City', 'Phone', 'Email', 'Zip/Postal code', and 'Country'. At the bottom, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The background shows a list of 'Recently Viewed' customers with names like Varman, Rahul, Dilipan, Gojo, Chirs, Robert Downey JR, Mani, Arsath, Surya, and Christopher Nolan.

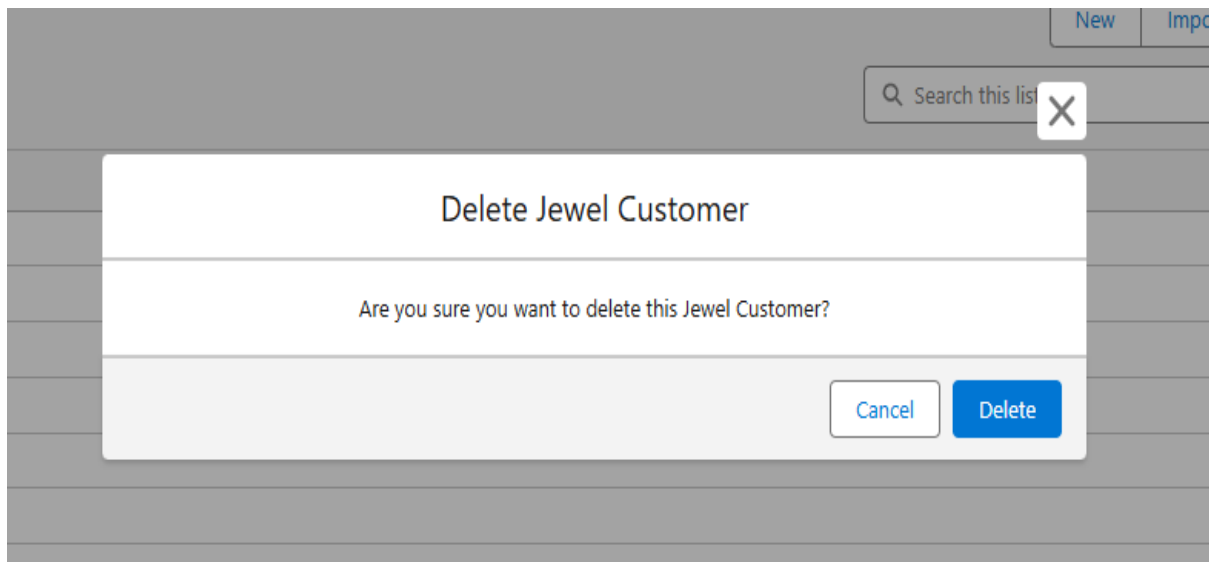
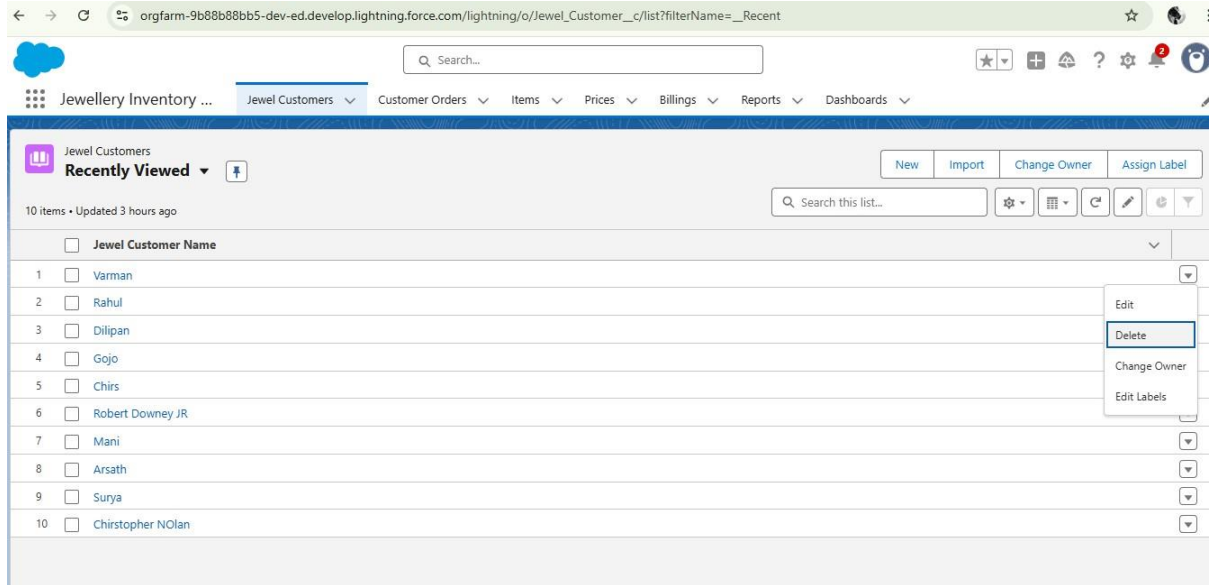
- ✓ FilltheDetailsinacorrespondingColumns.
- ✓ Thenclickonsave.

The screenshot shows a list view for 'Jewel Customers'. At the top, there is a 'New' button and a search bar labeled 'Search this list...'. Below the search bar, it says '10 items • Updated 3 hours ago'. The table has a header row with a checkbox and the column name 'Jewel Customer Name'. The first six rows of the table are visible, each with a checkbox and a customer name: 1. Varman, 2. Rahul, 3. Dilipan, 4. Gojo (highlighted), 5. Chirs, 6. Robert Downey JR.

	<input type="checkbox"/> Jewel Customer Name
1	<input type="checkbox"/> Varman
2	<input type="checkbox"/> Rahul
3	<input type="checkbox"/> Dilipan
4	<input type="checkbox"/> Gojo
5	<input type="checkbox"/> Chirs
6	<input type="checkbox"/> Robert Downey JR

## XV . DeleteaRecord(Jewel Customer)

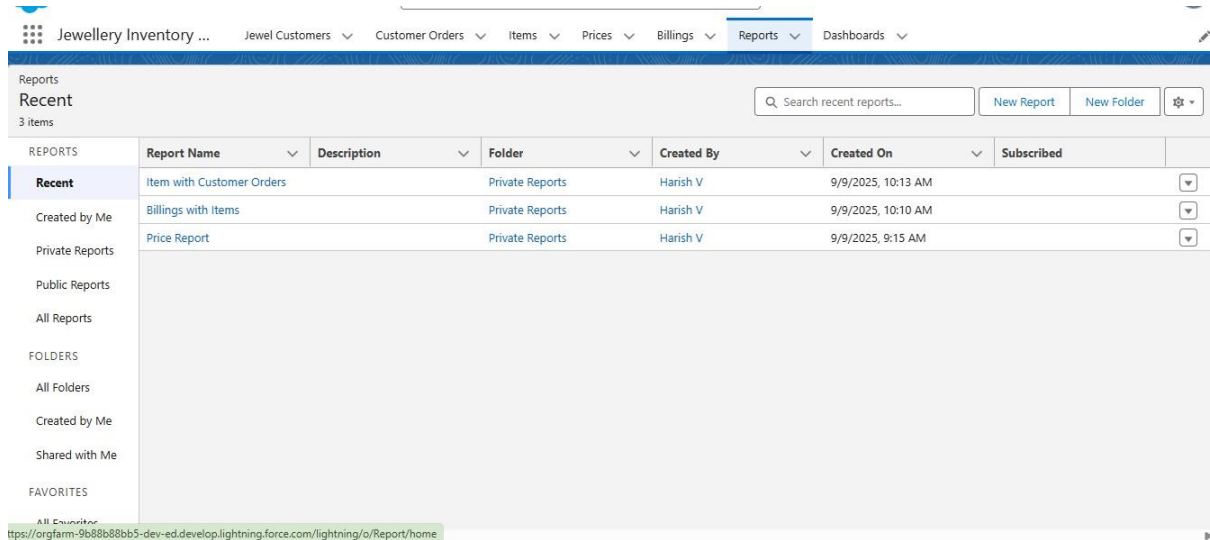
- ✓ Selectarecordwhichiswanttodelete



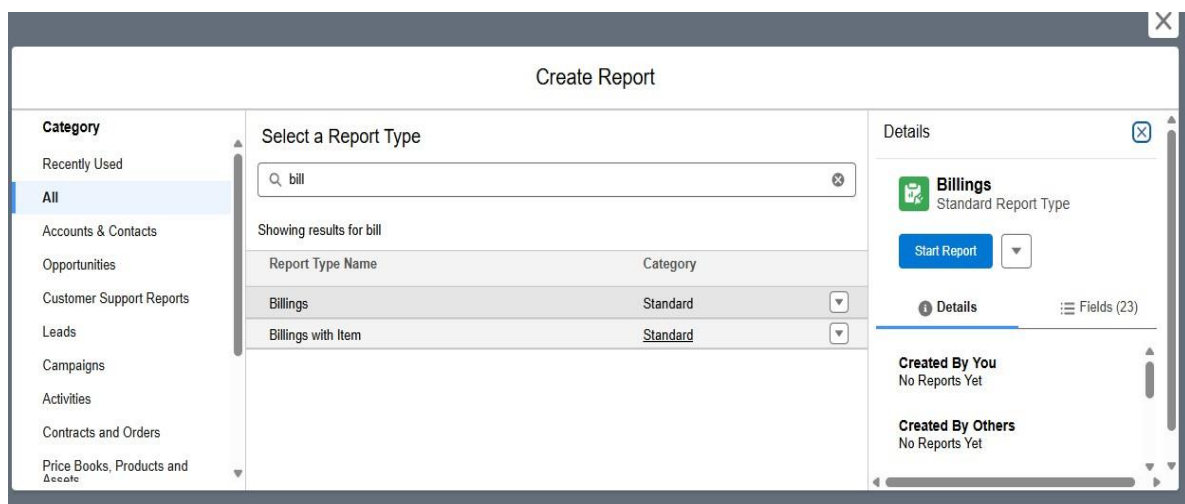
- ✓ ClickonDeletetodeletetheRecord

## XVI . CreateReport

- ✓ Gototheappandclickonthereports tab
- ✓ ClickNew Report



- ✓ Clickon“NEWREPORT”.
- ✓ SelectRecordtypeasobjectwecreated.
- ✓ ThenclickonStartReport.



New Billings Report

Show Fields

Filters 1

Fields

Groups

GROUP ROWS

Add group...

Columns

Add column...

# Paid Amount X

Ornament X

# Gold/Silver Price X

Billing: Item Id X

Previewing a limited number of records.

	Paid Amount	Ornament
1	\$95,000	Necklace
2	\$90,000	Bracelet
3	\$65,000	Ring
4	\$80,000	Ring
5	\$70,000	Ring
6	\$75,000	Crown
7	\$67,000	Ring
8	\$78,000	Earing
9	\$78,000	bracelet
10	\$65,000	Chain
11	\$763,000	

✓ InthefieldsSelecttheObjectyouwantshowintheColumn

Search all fields... Outline Filters 1

Summary Formulas (0)

Create Formula

Billing: Info (23)

A Billing: ID

A Billing: Item Id

# Amount

# Gold/Silver Price

A Item

# KDM Charge

# Making Charges

A Ornament

# Paid Amount

# Paying Amount

# Stones/other price

# Stone weight

# Total Amount

Groups

GROUP ROWS

Add group...

Columns

Add column...

# Total Amount X

# Making Charges X

# Paid Amount X

Ornament X

# Gold/Silver Price X

Billing: Item Id X

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

	Total Amount	Making Charges	Paid Amount	Ornament	Gold/Silver Price	Billing: Item Id
1	\$7,900	\$900.00	\$95,000	Necklace	\$0.00	Item-08
2	\$5,030	\$30.00	\$90,000	Bracelet	\$0.00	Item-04
3	\$5,030	\$30.00	\$65,000	Ring	\$0.00	Item-07
4	\$10,500	\$1,500.00	\$80,000	Ring	\$0.00	Item-01
5	\$6,050	\$50.00	\$70,000	Ring	\$0.00	Item-02
6	\$1,500	\$1,500.00	\$75,000	Crown	\$0.00	Item-03
7	\$8,900	\$3,900.00	\$67,000	Ring	\$0.00	Item-06
8	\$5,900	\$900.00	\$78,000	Earing	\$0.00	Item-05
9	\$6,950	\$50.00	\$78,000	bracelet	\$0.00	Item-09
10	\$7,200	\$1,200.00	\$65,000	Chain	\$0.00	Item-10
11	\$64,960	\$10,060.00	\$763,000		\$0.00	

✓ ClickonSaveandrun.


**Save Report**

\* Report Name

Report Unique Name i

Report Description

- ✓ Enter the Report Name and Click on save.
- ✓ The reports show like this in the image below.

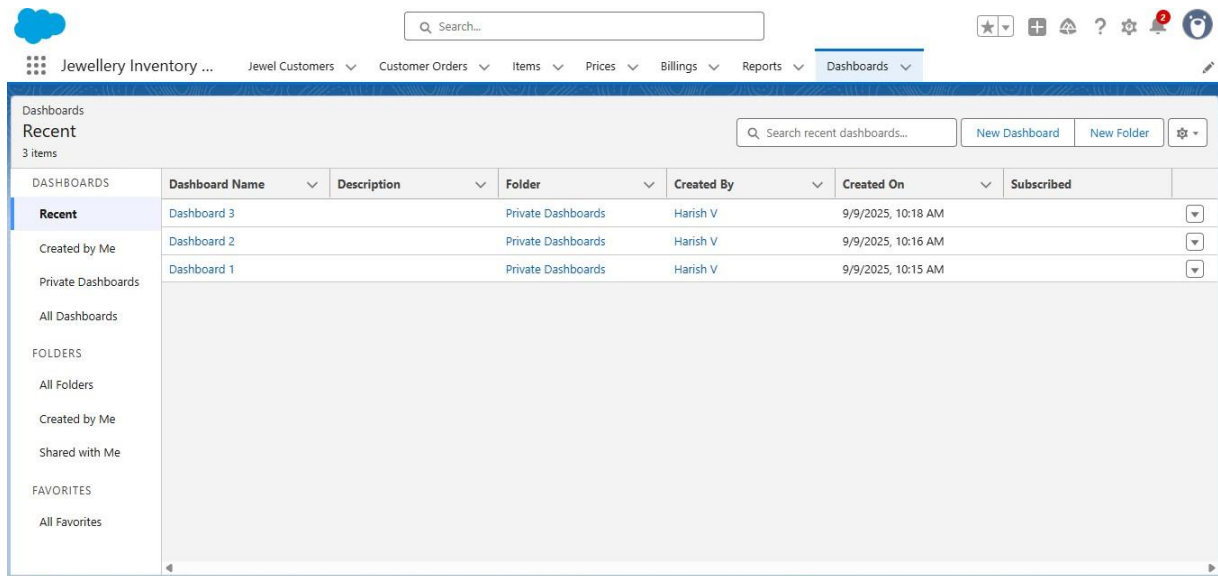
<div>  <b>Report: Billings with Item</b>  <b>Customer Name</b> </div>				
Total Records		Total Total Amount	Total Amount	
10		\$64,960	\$0.00	
	Total Amount ▼	Amount ▼	Billing: Item Id ▼	Item: Item Id ▼
1	\$10,500	\$0.00	Item-01	Item-10
2	\$1,500	\$0.00	Item-03	Item-08
3	\$5,030	\$0.00	Item-04	Item-07
4	\$5,900	\$0.00	Item-05	Item-06
5	\$8,900	\$0.00	Item-06	Item-05
6	\$6,950	\$0.00	Item-09	Item-02
7	\$7,900	\$0.00	Item-08	Item-03
8	\$7,200	\$0.00	Item-10	Item-01
9	\$6,050	\$0.00	Item-02	Item-09
10	\$5,030	\$0.00	Item-07	Item-04
11	\$64,960	\$0.00		

- ✓ Create another two record.
- ✓ Follow the same steps.
- ✓ Record type as:
  1. Item with Billings.
  2. Billings with item and Customer order.

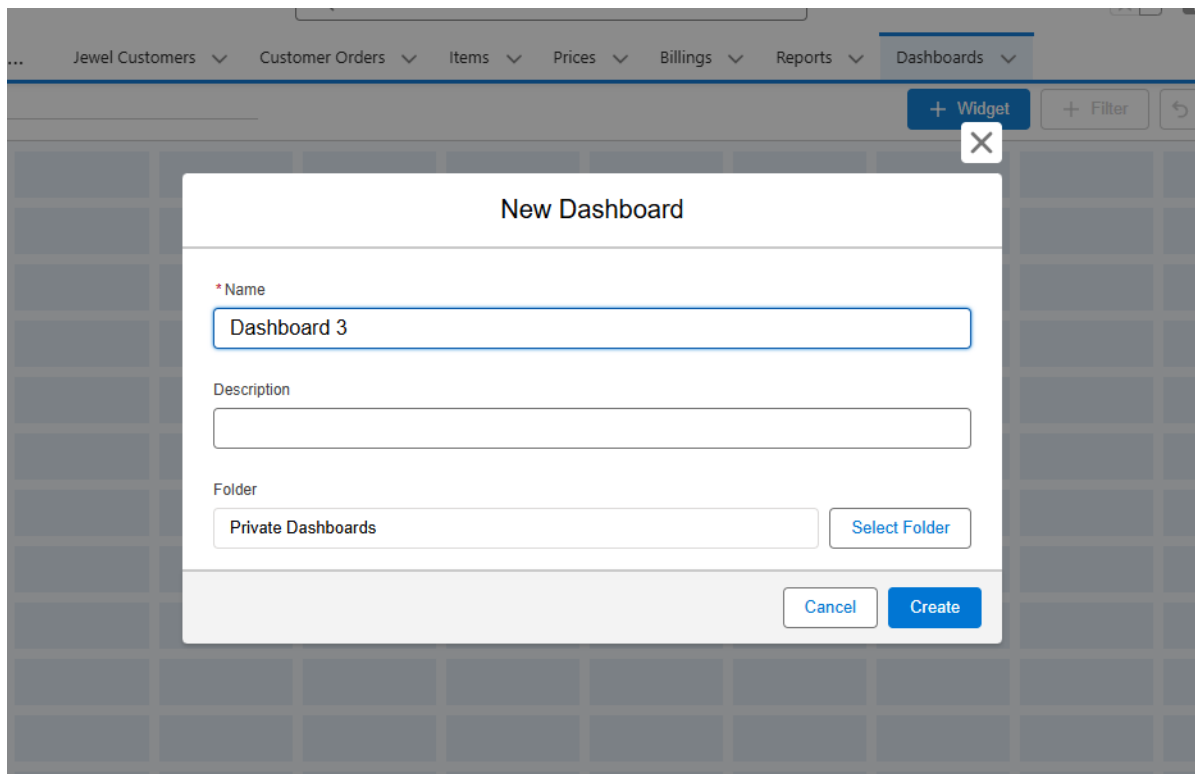


## XVII . Creating a Dashboard

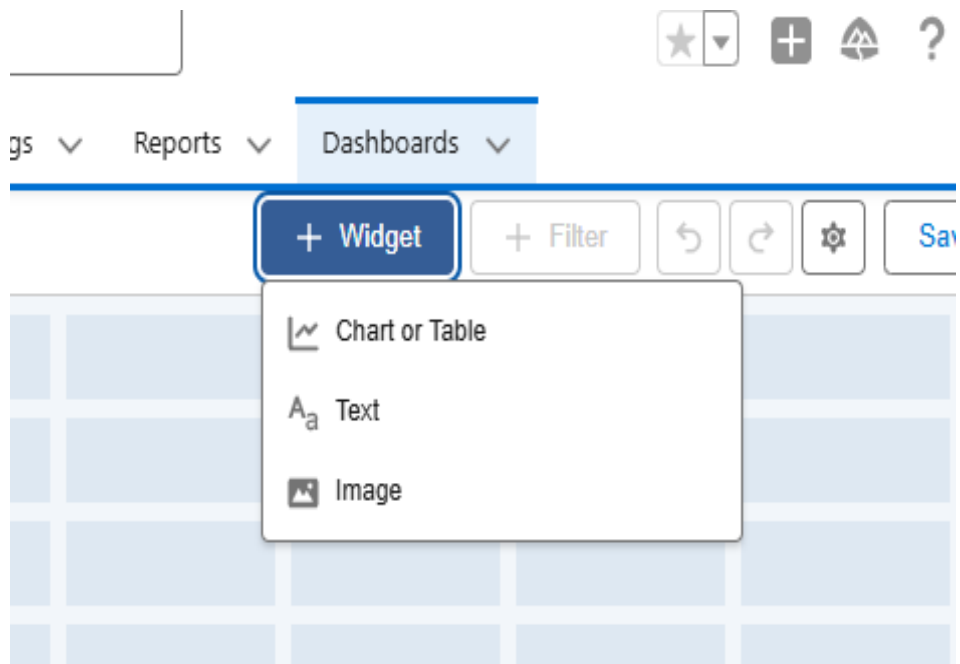
- ✓ GototheappclickontheDashboardstabs.



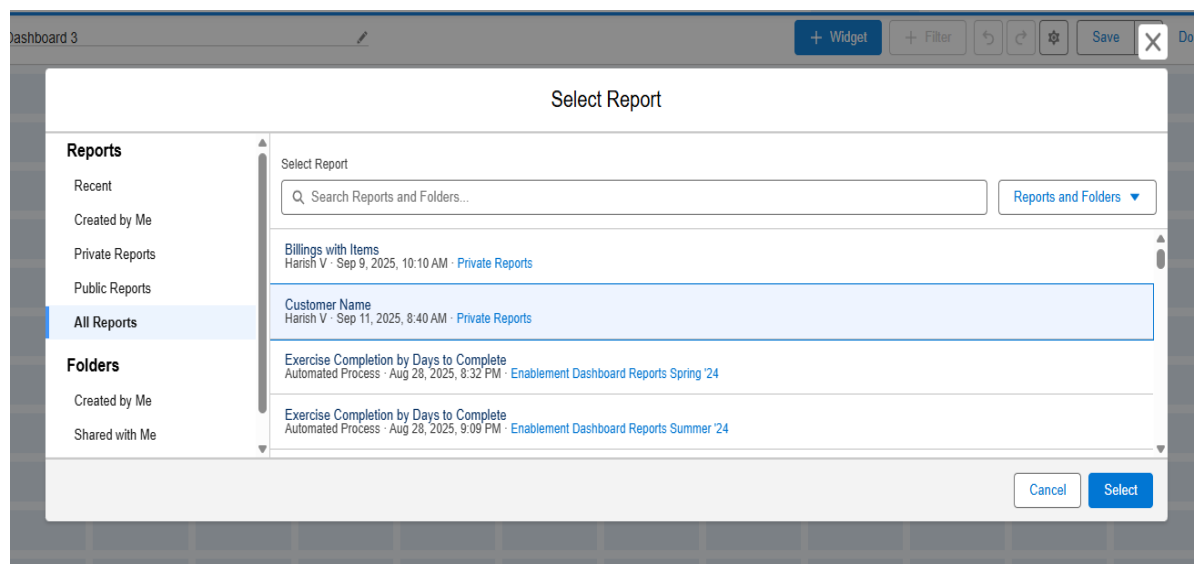
- ✓ Clickon“NEWDashboard”.
- ✓ EntertheNameas“Dashboard1”.
- ✓ Clickon Create.



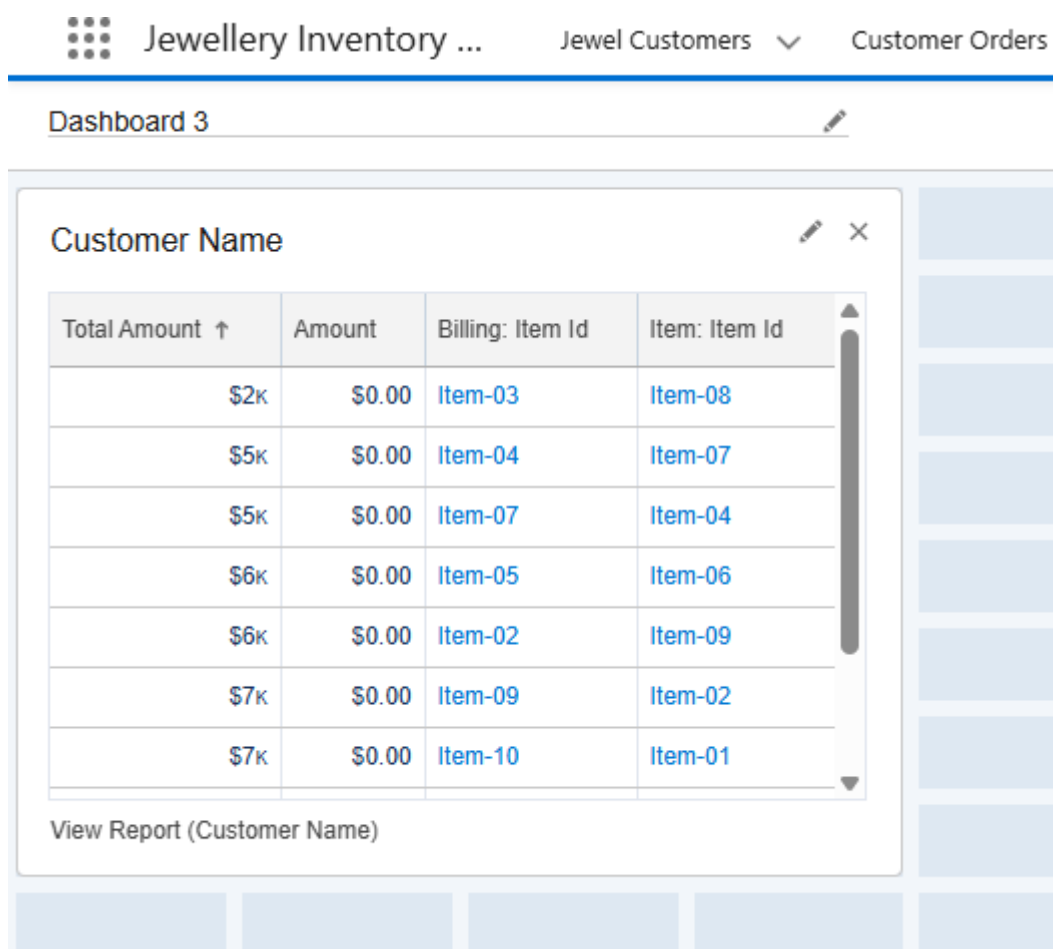
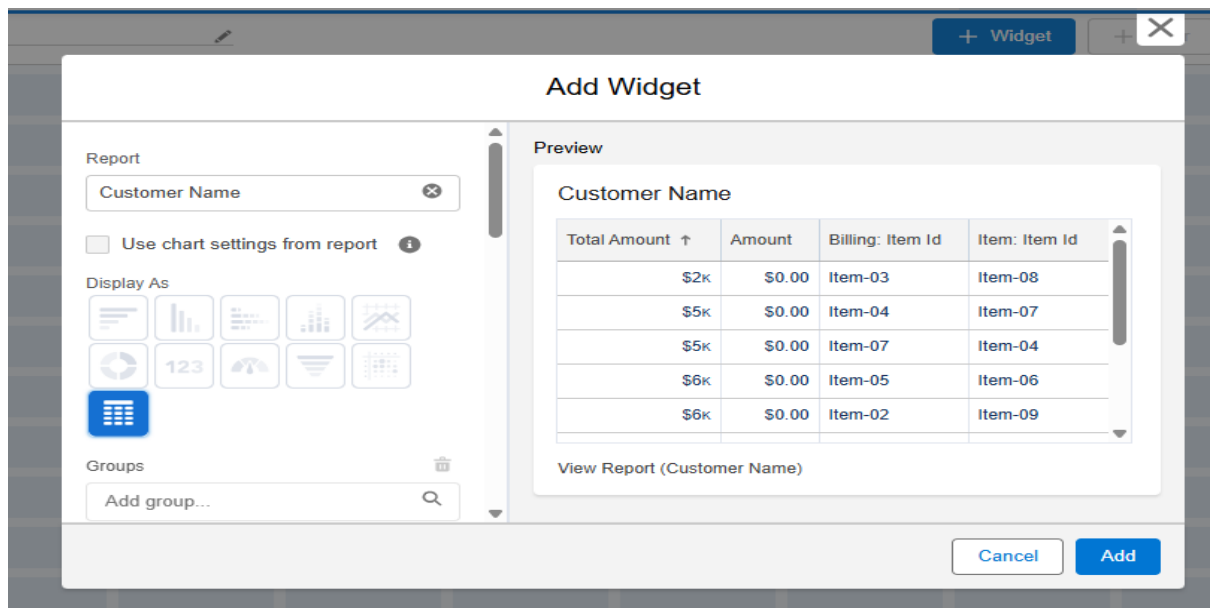
✓ Click on Widget and Select Chart and tables.



✓ Select the Report and Click on Select



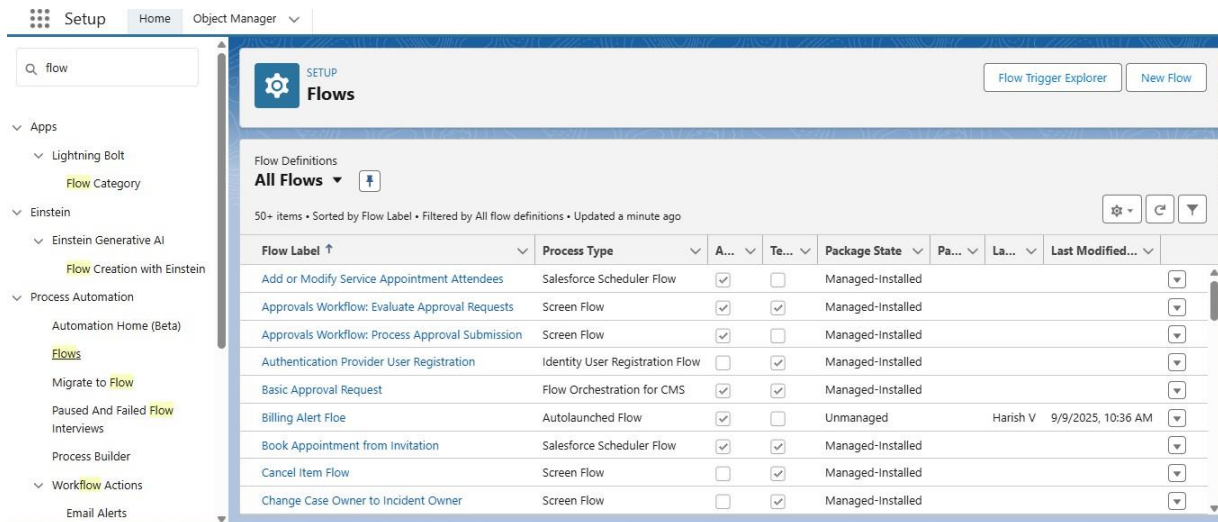
- ✓ Select“LightningTable”andClickon“ADD”



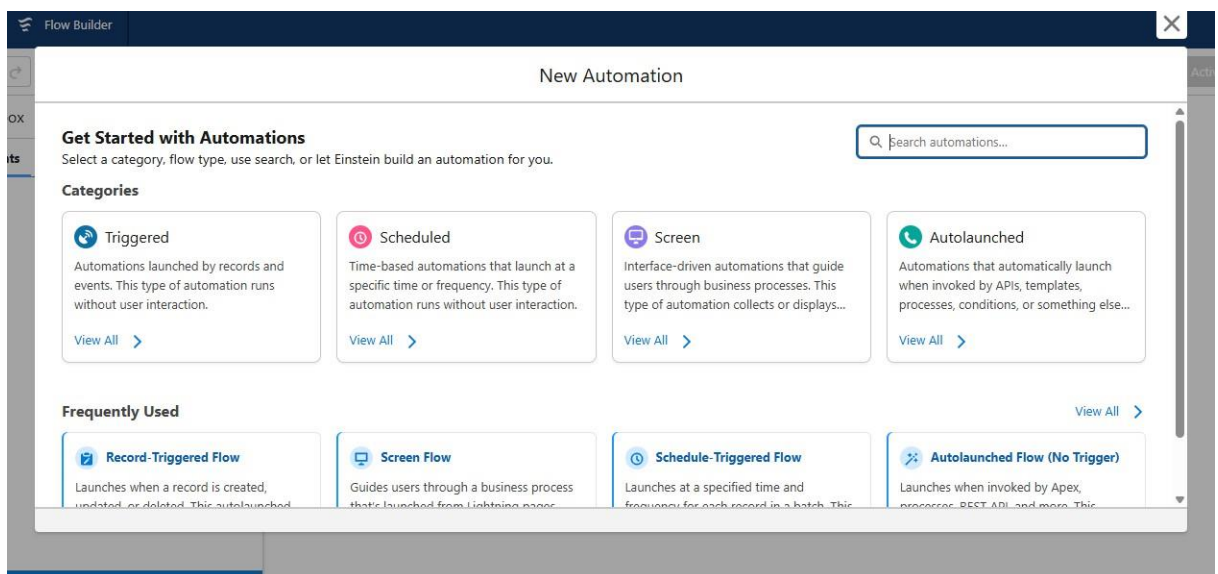
- ✓ ClickonSaveandDone.

## XVIII . CreatingFlow

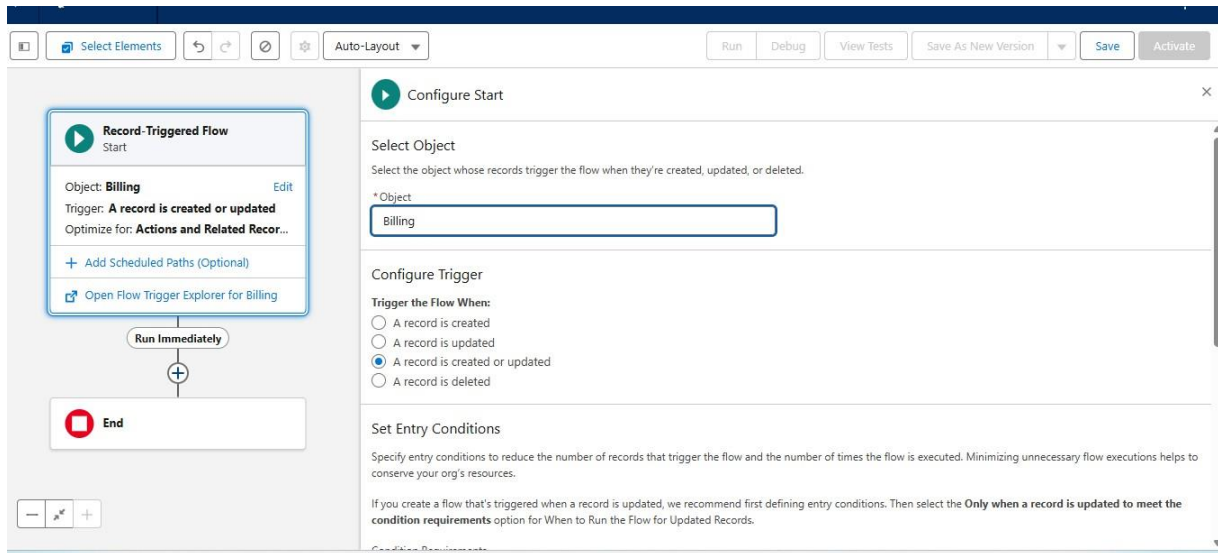
- ✓ InthesetpagesearchforFlowinthe“QuickfindBox”.



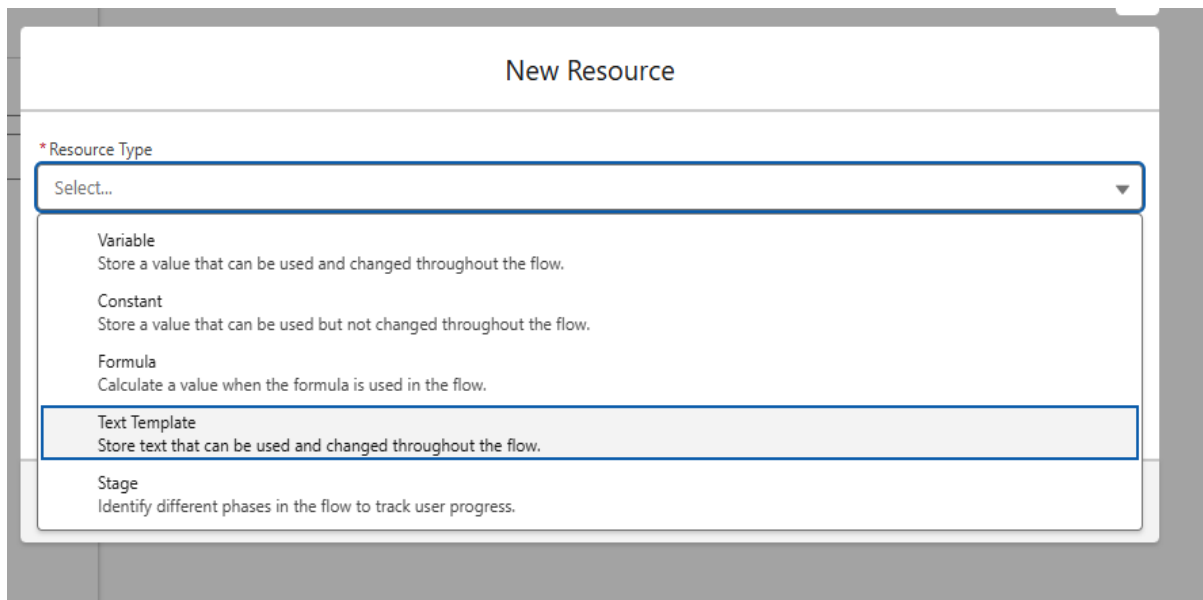
- ✓ SelectNewFlow.
- ✓ SelecttheRecord-triggeredflowandClickonCreate



- ✓ SelecttheObjectasa“Billing”intheDropdownlist.
- ✓ SelecttheTriggerFlowwhen:“AreCORDisCreatedor Updated”.
- ✓ SelecttheOptimisetheflowfor:“ActionsandRelatedRecords”and Click on Done.



- ✓ ChangethemodeAutolayoutfromFree-Form.
- ✓ Nowselectthemangeroptioninthetoolbox,clickNewresource.
- ✓ Selecttheresourcetypeastexttemplate.
- ✓ Selectthetexttemplate.



New Resource

\* Resource Type  
Text Template

\* API Name i

Description

\* Body i

Insert a resource... Q View as Rich Text v

Cancel Done

- ✓ In the API Name enter as “Emailbody”.
- ✓ In the Body enter this:
 

Hello

CustomerName: { !\$Record.Item\_\_r.Customer\_Name\_\_r.Name }

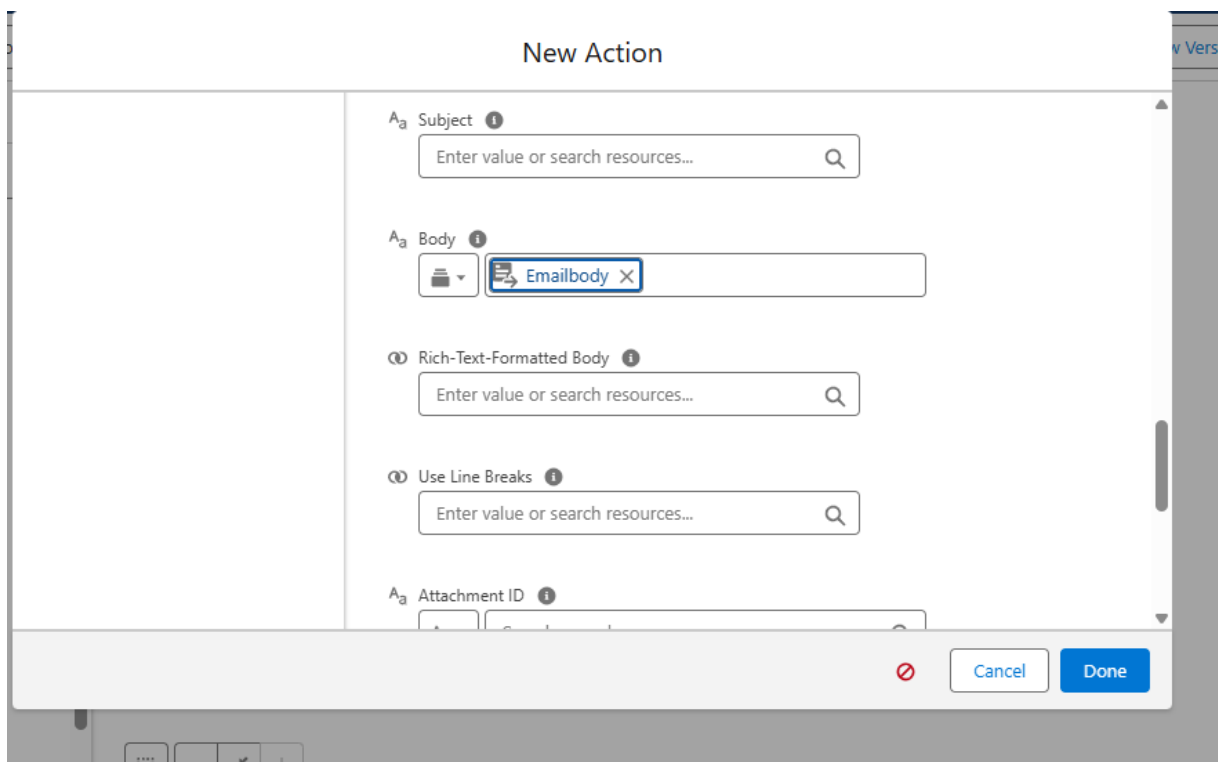
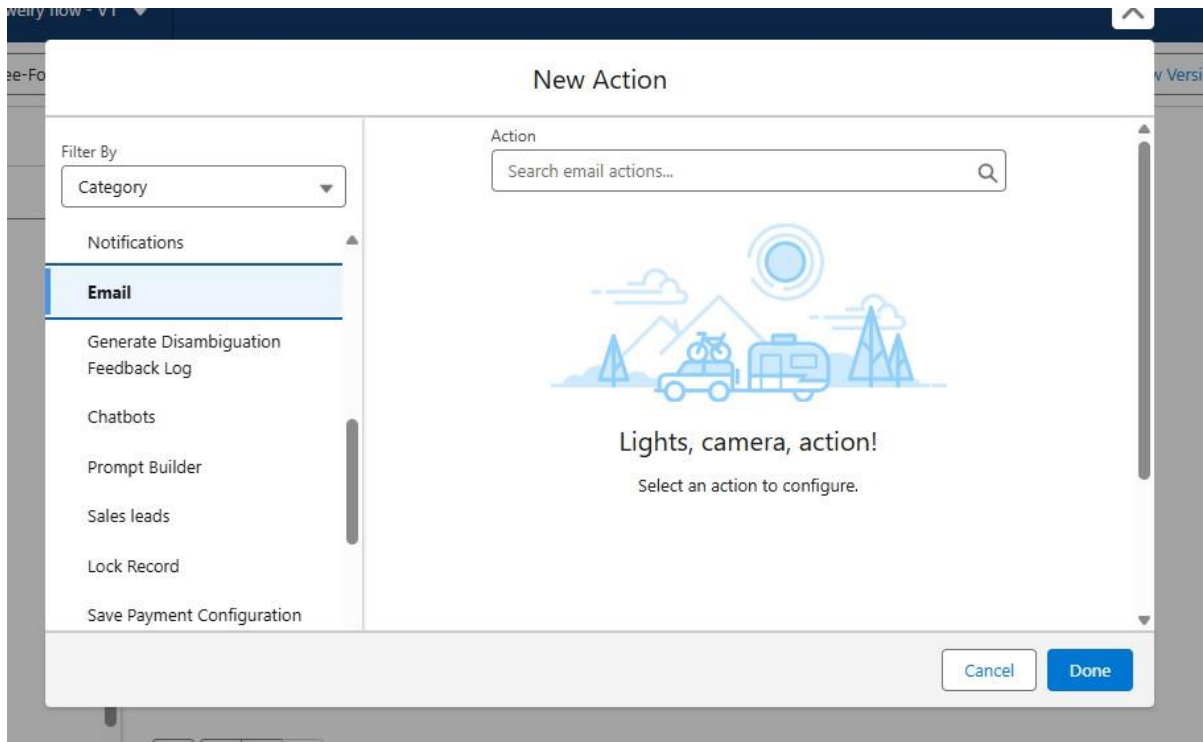
Here are the details for the item you purchased with Jewellery Inventory System

Item Type: { !\$Record.Item\_\_r.Item\_Type\_\_c }

Ornament: { !\$Record.Ornament\_\_c }

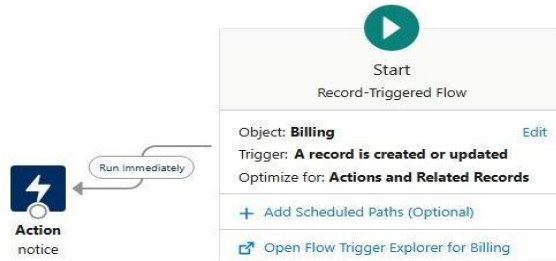
Weight: { !\$Record.Weight\_\_c } grams

Amount: { !\$Record.Amount\_\_c }
- ✓ Now click on Done and Click on Element.
- ✓ Drag the Action to the panel.
- ✓ The action bar will be opened in that search for “send email” and click on it.
- ✓ Give the label name as “notice”
- ✓ API Name will be auto populated.
- ✓ Enable the body in set input values for the selected action.
- ✓ Select the text template that was created



- ✓ Enter the recipient as: "Select triggering record then CustomerName" then Email field."
- ✓ Then click on done
- ✓ Now drag the path from the start to the action element.

- ✓ Clickonsave.GiventheFlowlabel,FlowApinamewillbeauto populated.
- ✓ Andclicksave,andclickon activate.



Activate Windows  
Go to Settings to activate Windows.

## 2. CONCLUSION :

The JewelGuard CRM application will revolutionize jewel management by providing a comprehensive platform for inventory tracking, customer management, sales automation, and data analysis. By implementing this CRM, jewelers and retailers can:

- Enhance operational efficiency
- Improve customer satisfaction and loyalty
- Increase sales and revenue
- Make informed business decisions
- Ensure secure and compliant data handling

With JewelGuard CRM, developers can build a robust and scalable solution that meets the unique needs of the jewelry industry, driving business growth and success.



