

# CRM APPLICATION FOR JEWEL MANAGEMENT SYSTEM

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## INTRODUCTION :

The jewelry business requires accurate tracking of inventory, customer relationships, billing, and sales to remain competitive in today's market. Traditional management methods often struggle with handling large product catalogs, personalized customer demands, and real-time reporting. To address these challenges, a **Salesforce CRM-based Jewel Management System** provides a modern solution.


This application integrates jewelry business operations with Salesforce CRM features such as **customer management, sales tracking, billing automation, and analytics**. It allows jewelers to manage customer details, record purchase histories, track orders, monitor stock levels, and generate invoices efficiently. By using Salesforce, the system ensures data security, cloud-based access, and scalability, making it easier for businesses to deliver **personalized services, strengthen customer relationships, and improve decision-making**.



# PURPOSE :

Creating Developer Account :

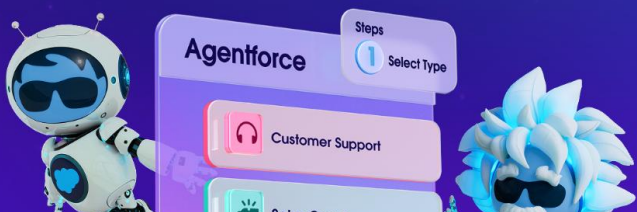
By using URL - <https://developer.salesforce.com/signup>



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|   |  |
|---|--|
| First name  | Last name                                      |
| <input type="text" value="Naveen"/>                 | <input type="text" value="N"/>                 |
| Job title   | Work email                                     |
| <input type="text" value="Developer"/>              | <input type="text" value="23bsit147naveenn@"/> |
| Company   | Country/Region                                 |
| <input type="text" value="Sri Krishna adithya co"/> | <input type="text" value="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 45 days.

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☒ I'm not a robot 

# Flowchart:

The flowchart for the CRM Application for Jewel Management provides a high-level overview of the system's architecture and its primary functions. It is designed to be a simple, illustrative diagram that helps stakeholders quickly understand what the application does. At its core, the JEWEL MANAGEMENT CRM acts as the central hub for all business operations. It is a single, unified platform where data is stored, processes are automated, and key activities are managed.

Each of the five surrounding boxes represents a major module of the CRM:

**1. CUSTOMER MANAGEMENT:** This branch shows that the CRM is the central point for managing all customer data, from contact information to purchase history and preferences.

**2. SALES & BILLING:** This illustrates the CRM's role in streamlining the sales process, from processing new orders to automatically generating invoices and managing payments.

**3. INVENTORY TRACKING:** This highlights how the system provides real-time visibility into the stock of jewels, helping to prevent shortages and manage valuable assets efficiently.

**4. REPAIR REQUESTS:** This demonstrates the CRM's capability to track and manage all after-sales service and repair requests, ensuring a smooth and transparent process for customers.

**5. LOYALTY PROGRAMS:** This shows the system's function in automatically managing loyalty points and membership tiers, which is crucial for retaining customers and encouraging repeat business.

Flowchart



## CREATION OF OBJECT :

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

Salesforce objects are of two types:

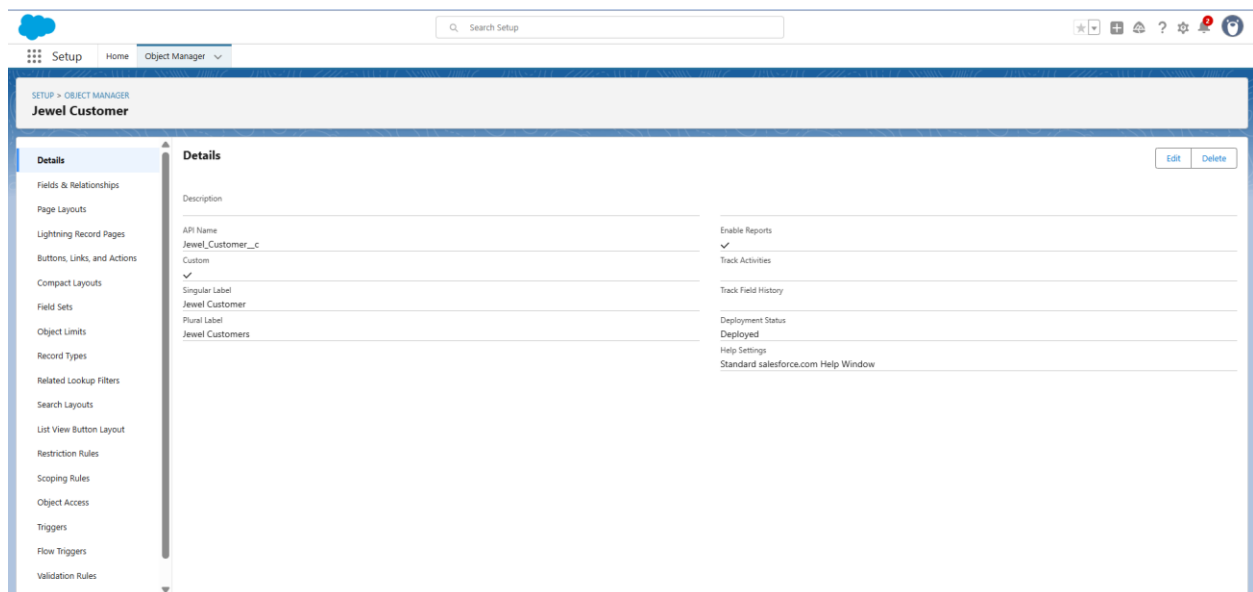
- 1. Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- 2. Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

### The Required Objects :

- o Jewel Customer Object
- o Item Object

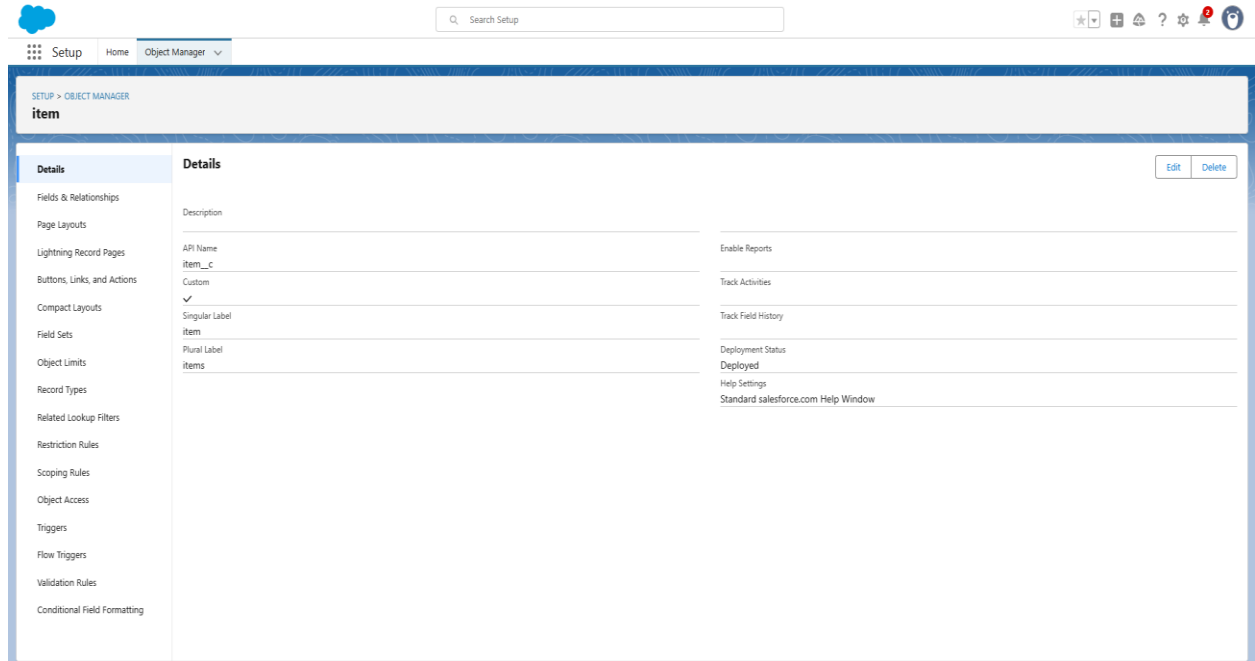
### Jewel Customer Object :

The purpose of creating a Jewel Customer custom object is to store and manage information about Customer.



## Item Object :

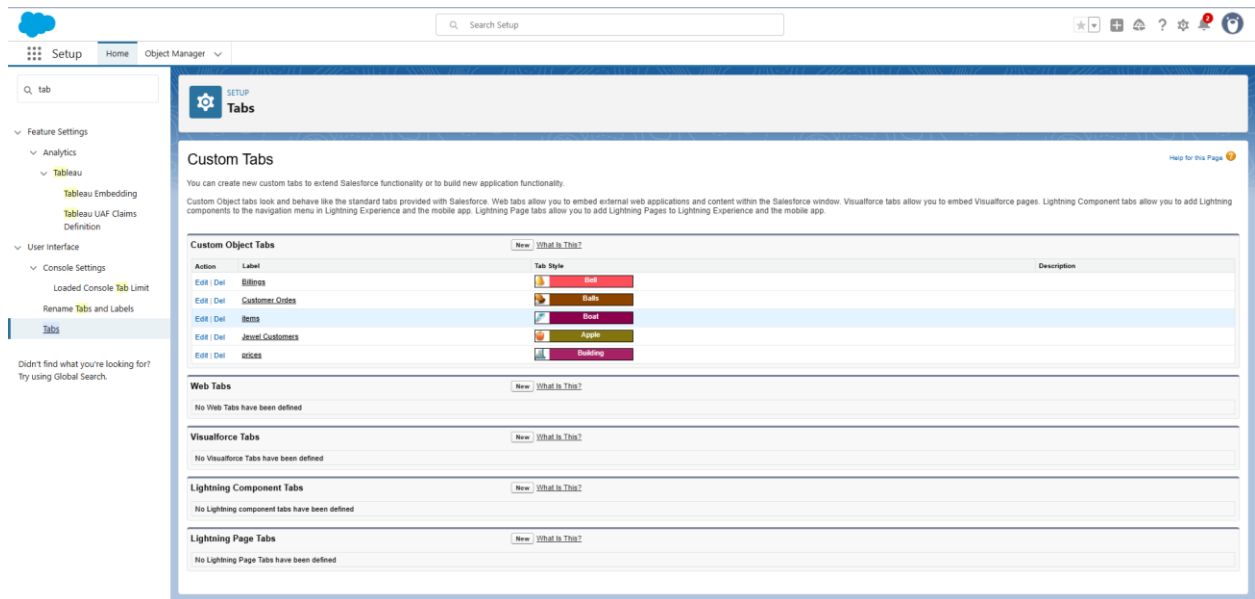
The purpose of creating a Item object is to manage the inventory of gold and silver items.



Both the Objects are Created Successfully .

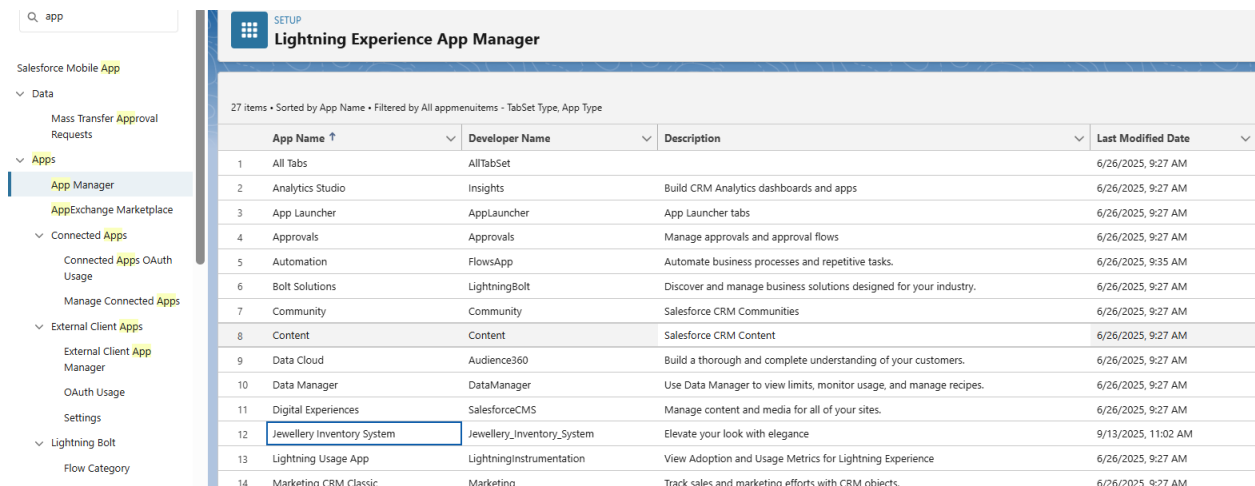
## Creation of Tabs :

A tab is like a user interface that is used to build records for objects and to view the records in the objects.



## Creation of the Lightning App :

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.





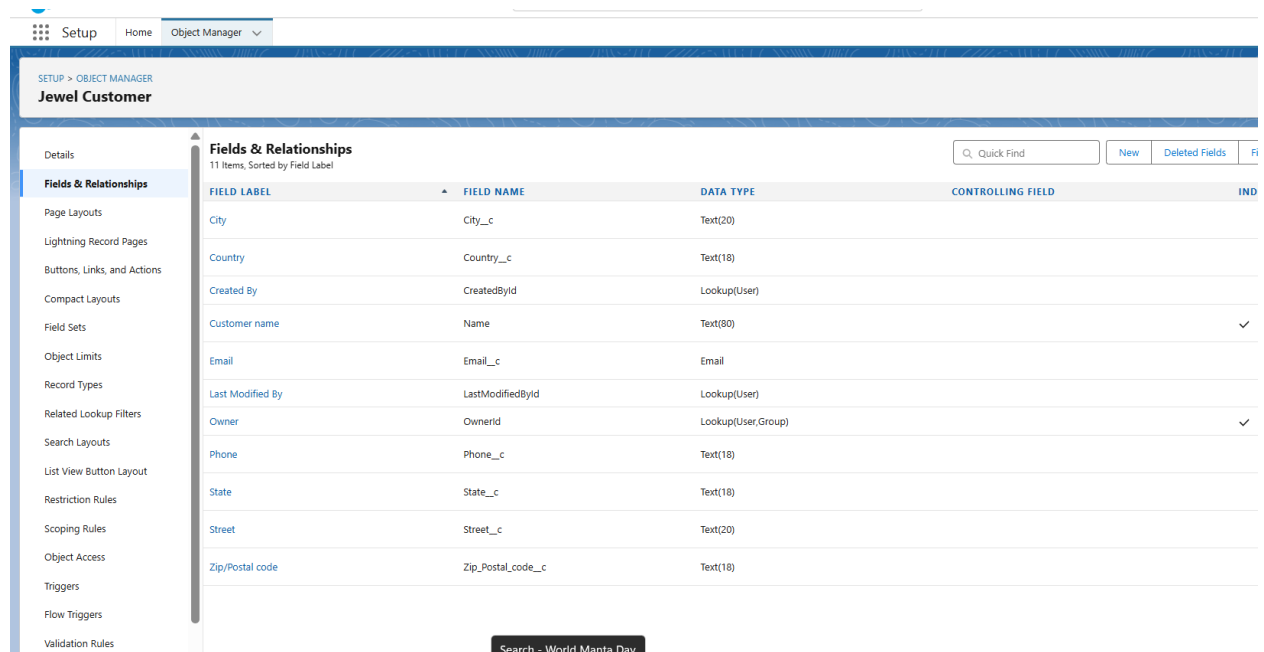
## Creation of Fields :

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

### Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organiser or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

### Jewel Customer Object Fields :




|                             |                                 |                    |                    |                   |
|-----------------------------|---------------------------------|--------------------|--------------------|-------------------|
| SETUP > OBJECT MANAGER      |                                 |                    |                    |                   |
| Jewel Customer              |                                 |                    |                    |                   |
| Details                     | Fields & Relationships          |                    |                    |                   |
|                             | 11 Items, Sorted by Field Label |                    |                    |                   |
| 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            |                                 |                    |                    |                   |
|                             | FIELD LABEL                     | FIELD NAME         | DATA TYPE          | CONTROLLING FIELD |
|                             | 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           | Text(18)           |                   |
|                             | State                           | State__c           | Text(18)           |                   |
|                             | Street                          | Street__c          | Text(20)           |                   |
|                             | Zip/Postal code                 | Zip_Postal_code__c | Text(18)           |                   |

**Item Object Fields :**

[illegible]

### Billing Object Fields:



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

6 Items, Sorted by Field Label

FIELD LABEL

FIELD NAME

DATA TYPE

CONTROLLING FIELD

|                  |                  |                    |  |
|------------------|------------------|--------------------|--|
| billing Name     | Name             | Auto Number        |  |
| Created By       | CreatedById      | Lookup(User)       |  |
| Last Modified By | LastModifiedById | Lookup(User)       |  |
| Owner            | OwnerId          | Lookup(User,Group) |  |
| Paid Amount      | Paid_Amount__c   | Currency(18, 0)    |  |
| Paying Amount    | Paying_Amount__c | Currency(18, 0)    |  |

Quick Find

## Price Object Fields:

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

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

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Fields & Relationships

5 Items, Sorted by Field Label

Quick Find

| FIELD LABEL      | FIELD NAME       | DATA TYPE          | CONTROLLING FIELD |
|------------------|------------------|--------------------|-------------------|
| Created By       | CreatedById      | Lookup(User)       |                   |
| Gold Price       | Gold_Price__c    | Currency(18, 0)    |                   |
| Last Modified By | LastModifiedById | Lookup(User)       |                   |
| Owner            | OwnerId          | Lookup(User,Group) |                   |
| price Name       | Name             | Auto Number        |                   |

## Customer Order Fields:

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

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

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Fields & Relationships

5 Items, Sorted by Field Label

Quick Find

New

Delete

| FIELD LABEL         | FIELD NAME       | DATA TYPE              | CONTROLLING FIELD |
|---------------------|------------------|------------------------|-------------------|
| Created By          | CreatedById      | Lookup(User)           |                   |
| Customer            | Customer__c      | Lookup(Jewel Customer) |                   |
| Customer Order Name | Name             | Auto Number            |                   |
| item                | item__c          | Master-Detail(item)    |                   |
| Last Modified By    | LastModifiedById | Lookup(User)           |                   |

## Creation of Profiles :

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

- Gold Smith Profile

Object Manager

SETUP

Profiles

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.

Login IP Ranges

Enabled Apex Class Access

Enabled Visualforce Page Access

Enabled External Data Source Access

Enabled Named Credential Access

Enabled External Credential Principal Access

Enabled Custom Metadata Type Access

Enabled Custom Setting

Enabled Flow Access

Enabled Service Presence Status Access

Enabled Custom Permissions

Profile Detail

Edit

Clone

Delete

View Users

Profile: Gold Smith – Salesforce – Developer Edition

Custom Profile

✓

Description

Created By

Vijaya kumar M. 9/14/2025, 6:47 AM

Modified By

Vijaya kumar M. 9/14/2025, 10:05 AM

Page Layouts

Standard Object Layouts

Global

Global Layout

( View Assignment )

Email Application

Not Assigned

( View Assignment )

Home Page Layout

Home Page Default

( View Assignment )

Account

Account Layout

( View Assignment )

Alternative Payment Method

Alternative Payment Method Layout

( View Assignment )

Appointment Invitation

Appointment Invitation Layout

( View Assignment )

Asset

Asset Layout

( View Assignment )

Asset Action

Asset Action Layout

( View Assignment )

Asset Action Source

Asset Action Source Layout

( View Assignment )

Asset Relationship

Asset Relationship Layout

( View Assignment )

Asset State Period

Asset State Period Layout

( View Assignment )

Assigned Resource

Assigned Resource Layout

Location Group Assignment

Location Group Assignment Layout

( View Assignment )

Macro

Macro Layout

( View Assignment )

Object Milestone

Object Milestone Layout

( View Assignment )

Operating Hours

Operating Hours Layout

( View Assignment )

Opportunity

Opportunity Layout

( View Assignment )

Opportunity Product

Opportunity Product Layout

( View Assignment )

Order

Order Layout

( View Assignment )

Order Product

Order Product Layout

( View Assignment )

Payment

Payment Layout

( View Assignment )

Payment Authorization

Payment Authorization Layout

( View Assignment )

Payment Authorization Adjustment

Payment Authorization Adjustment Layout

( View Assignment )

Payment Gateway

Payment Gateway Layout

000004he73%3Fisdtp%3Dp1%27;

- Worker Profile

**Profiles**

### 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.

[Login IP Ranges](#) | 
 [Enabled Apex Class Access](#) | 
 [Enabled Salesforce Page Access](#) | 
 [Enabled External Data Source Access](#) | 
 [Enabled Named Credential Access](#) | 
 [Enabled External Credential Principal Access](#) | 
 [Enabled Custom Metadata Type Access](#) | 
 [Enabled Custom Settings Access](#) | 
 [Enabled Flow Access](#) | 
 [Enabled Service Presence Status Access](#) | 
 [Enabled Custom Permissions](#)

**Profile Detail**

[Edit](#)
[Clone](#)
[Delete](#)
[View Users](#)

|              |                     |                    |  |
|--------------|---------------------|--------------------|--|
| Name         | Worker Profile      |                    |  |
| User License | Salesforce Platform | Custom Profile     | <input checked="" type="checkbox"/>              |
| Description  |                     |                    |  |
| Created By   | Vijaya kumar M      | 9/14/2025, 7:10 AM | Modified By: Vijaya kumar M, 9/14/2025, 10:05 AM |

**Page Layouts**

|                            |  |                                  |  |
|----------------------------|--|----------------------------------|--|
| Standard Object Layouts    |  |                                  |  |
| Global                     | <a href="#">Global Layout</a><br>( <a href="#">View Assignment</a> )                     | Lead                             | <a href="#">Lead Layout</a><br>( <a href="#">View Assignment</a> )                             |
| Email Application          | <a href="#">Not Assigned</a><br>( <a href="#">View Assignment</a> )                      | Location                         | <a href="#">Location Layout</a><br>( <a href="#">View Assignment</a> )                         |
| Home Page Layout           | <a href="#">Home Page Default</a><br>( <a href="#">View Assignment</a> )                 | Location Group                   | <a href="#">Location Group Layout</a><br>( <a href="#">View Assignment</a> )                   |
| Account                    | <a href="#">Account Layout</a><br>( <a href="#">View Assignment</a> )                    | Location Group Assignment        | <a href="#">Location Group Assignment Layout</a><br>( <a href="#">View Assignment</a> )        |
| Alternative Payment Method | <a href="#">Alternative Payment Method Layout</a><br>( <a href="#">View Assignment</a> ) | Object Milestone                 | <a href="#">Object Milestone Layout</a><br>( <a href="#">View Assignment</a> )                 |
| Appointment Invitation     | <a href="#">Appointment Invitation Layout</a><br>( <a href="#">View Assignment</a> )     | Operating Hours                  | <a href="#">Operating Hours Layout</a><br>( <a href="#">View Assignment</a> )                  |
| Asset                      | <a href="#">Asset Layout</a><br>( <a href="#">View Assignment</a> )                      | Order                            | <a href="#">Order Layout</a><br>( <a href="#">View Assignment</a> )                            |
| Asset Relationship         | <a href="#">Asset Relationship Layout</a><br>( <a href="#">View Assignment</a> )         | Order Product                    | <a href="#">Order Product Layout</a><br>( <a href="#">View Assignment</a> )                    |
| Assigned Resource          | <a href="#">Assigned Resource Layout</a><br>( <a href="#">View Assignment</a> )          | Payment                          | <a href="#">Payment Layout</a><br>( <a href="#">View Assignment</a> )                          |
| Associated Location        | <a href="#">Associated Location Layout</a><br>( <a href="#">View Assignment</a> )        | Payment Authorization            | <a href="#">Payment Authorization Layout</a><br>( <a href="#">View Assignment</a> )            |
| Async Operation Log        | <a href="#">Async Operation Log Layout</a><br>( <a href="#">View Assignment</a> )        | Payment Authorization Adjustment | <a href="#">Payment Authorization Adjustment Layout</a><br>( <a href="#">View Assignment</a> ) |
| Authorization Form         | <a href="#">Authorization Form Layout</a>  | Payment Gateway                  | <a href="#">Payment Gateway Layout</a>   |

## Creation of Roles:

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organisation can have to data. Simply put, it describes what a user could see within the Salesforce organisation.

- Gold Smith
- Worker



User

Kol Mikaelson

Permission Set Assignments

Permission Set Assignments: Activation Required

Permission Set Group Assignments

Permission Set License Assignments

Personal Groups

Public Group Membership

Queue Membership

Team

Managers in the Role Hierarchy

OAuth Apps

Third-Party Account Links

Built-in Authenticators

Installed Mobile Apps

Authentication Settings for External Systems

Login History

User Provisioning Accounts

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

|  |   |   |                                     |
|--|---|---|-------------------------------------|
| Name   | Kol Mikaelson   | Role  | Worker                              |
| Alias  | mika  | User License  | Salesforce Platform                 |
| Email  | workerkol@smartbadge.com <div>Verify</div>              | Profile   | Worker Profile                      |
| Username   | workerkol@smartbadge.com                                | Active  | <input checked="" type="checkbox"/> |
| Nickname   | mikakol <div></div>                                     | 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"/>            |
| Language   | English   | Mobile Push Registrations                             | View                                |
| Delegated Approver                                     | User: Kol Mikaelson - Salesforce - Developer Edition    | Data.com User Type                                    | <div></div>                         |
| Manager  |   | Accessibility Mode (Classic Only)                     | <div></div>                         |
| Receive Approval Request Emails                        | Only if I am an approver                                | Debug Mode  | <div></div>                         |
| Federation ID  |   | High-Contrast Palette on Charts                       | <div></div>                         |
| App Registration: One-Time Password Authenticator      | <div></div>   | Load Lightning Pages While Scrolling                  | <div></div>                         |
| App Registration: Salesforce Authenticator             | <div></div>   | Salesforce CRM Content User                           | <input checked="" type="checkbox"/> |
| Security Key (U2F or WebAuthn)                         | <div></div>   | Receive Salesforce CRM Content Email Alerts           | <input checked="" type="checkbox"/> |
| Lightning Login  | <div></div>   | Receive Salesforce CRM Content Alerts as Daily Digest | <input checked="" type="checkbox"/> |
| Temporary Verification Code (Expires in 1 to 24 Hours) | <div>Generate</div>                                     | Make Setup My Default Landing Page                    | <input type="checkbox"/>            |
|  |   | Allow Forecasting                                     | <input type="checkbox"/>            |
|  |   | No MRU Updates  | <div></div>                         |
|  |   | Call Center   |                                     |

SETUP

Users

User

Niklaus Mikaelson

Permission Set Assignments

Permission Set Assignments: Activation Required

Permission Set Group Assignments

Permission Set License Assignments

Personal Groups

Public Group Membership

Queue Membership

Team

Managers in the Role Hierarchy

OAuth Apps

Third-Party Account Links

Built-in Authenticators

Installed Mobile Apps

Authentication Settings for External Systems

Login History

User Provisioning Accounts

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

|  |   |   |                                     |
|--|---|---|-------------------------------------|
| Name   | Niklaus Mikaelson                                       | Role  | Gold Smith                          |
| Alias  | mika  | User License  | Salesforce                          |
| Email  | goldsmith@smartbadge.com <div>Verify</div>              | Profile   | Gold Smith                          |
| Username   | goldsmith@smartbadge.com                                | Active  | <input checked="" type="checkbox"/> |
| Nickname   | goldsmith <div></div>                                   | 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"/>            |
| Language   | English   | Mobile Push Registrations                             | View                                |
| Delegated Approver                                     |   | Data.com User Type                                    | <div></div>                         |
| Manager  |   | Accessibility Mode (Classic Only)                     | <div></div>                         |
| Receive Approval Request Emails                        | Only if I am an approver                                | Debug Mode  | <div></div>                         |
| Federation ID  |   | High-Contrast Palette on Charts                       | <div></div>                         |
| App Registration: One-Time Password Authenticator      | <div></div>   | Load Lightning Pages While Scrolling                  | <div></div>                         |
| App Registration: Salesforce Authenticator             | <div></div>   | Send Apex Warning Emails                              | <input type="checkbox"/>            |
| Security Key (U2F or WebAuthn)                         | <div></div>   | Salesforce CRM Content User                           | <input checked="" type="checkbox"/> |
| Lightning Login  | <div></div>   | Receive Salesforce CRM Content Email Alerts           | <input checked="" type="checkbox"/> |
| Temporary Verification Code (Expires in 1 to 24 Hours) | <div>Generate</div>                                     | Receive Salesforce CRM Content Alerts as Daily Digest | <input checked="" type="checkbox"/> |
|  |   | Make Setup My Default Landing Page                    | <input type="checkbox"/>            |

## Creation of Page Layouts :

Page Layout in Salesforce allows us to customise the design and organise detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

- Layout for Gold
- Layout for Silver

Manager ▾

| Page Layouts   |                                    |                                     |
|--|------------------------------------|-------------------------------------|
| 3 Items, Sorted by Page Layout Name  |                                    |                                     |
| <input type="text" value="Quick Find"/> <a href="#">New</a> <a href="#">Page</a> |                                    |                                     |
| PAGE LAYOUT NAME   | CREATED BY                         | MODIFIED BY                         |
| item Layout  | Vijaya kumar M, 9/12/2025, 8:13 AM | Vijaya kumar M, 9/14/2025, 10:05 AM |
| Page Layout for Gold   | Vijaya kumar M, 9/14/2025, 7:41 AM | Vijaya kumar M, 9/14/2025, 10:05 AM |
| Page Layout for Silver   | Vijaya kumar M, 9/14/2025, 7:47 AM | Vijaya kumar M, 9/14/2025, 10:05 AM |

## Creation of Record Type :

Record Types are a way of grouping many records of one type for that object. These can be applied to any standard or custom object, and allow you to have a different page layout, fields, required fields, and picklist values.

- Gold ▪ Silver

Object Manager ▾

| Record Types   |                          |        |                                    |
|--|--------------------------|--------|------------------------------------|
| 2 Items, Sorted by Record Type Label   |                          |        |                                    |
| <input type="text" value="Quick Find"/> <a href="#">New</a> <a href="#">Page Layout Assignment</a> |                          |        |                                    |
| RECORD TYPE LABEL  | DESCRIPTION              | ACTIVE | MODIFIED BY                        |
| Gold   | Gold items information   | ✓      | Vijaya kumar M, 9/14/2025, 7:58 AM |
| Silver   | Silver items information | ✓      | Vijaya kumar M, 9/14/2025, 8:01 AM |



Creation of a Permission Set :

A standard permission set consists of a group of common permissions for a particular feature associated with a permission set licence. Using a standard permission set saves you time and facilitates administration because you don't need to create the custom permission set.

Per to Worker

SETUP

Permission Sets

Permission Sets

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

All Permission Sets | Edit | Delete | Create New View

New

| Action  | Permission Set Name                                | Description   | License                    |
|---|--|---|----------------------------|
| <input type="checkbox"/> Clone                                | Partner Connect Partner Admin Setup                | Set up Partner Connect from a partner org. Partner Connect is a Partner Relationship Managem...     | Salesforce                 |
| <input type="checkbox"/> Clone                                | Payments Administrator                             | Has all the user permissions to gate access to APIs that are available to Salesforce Payments us... | Salesforce Payments Intern |
| <input type="checkbox"/> Del   <input type="checkbox"/> Clone | Per to Worker                                      |   |                            |
| <input type="checkbox"/> Clone                                | Prompt Template Manager                            | Manage prompt templates using Prompt Builder and run them using generative AI features.             | Einstein Prompt Templates  |
| <input type="checkbox"/> Clone                                | Prompt Template User                               | Run prompt templates using generative AI features.  | Einstein Prompt Templates  |
| <input type="checkbox"/> Clone                                | PromptTemplatePermSet                              |   | Cloud Integration User     |
| <input type="checkbox"/> Clone                                | Publish Suggested for You Nudges: Integration User | Access the Core Adoption Service and tenant orgs, which are used to publish Suggested for You...    | Cloud Integration User     |

Creation of Triggers :

Open

| Entity Type      | Entities                | Related                            |
|------------------|-------------------------|------------------------------------|
| Entity Type      | NameNamespace           | NameExtentDirection                |
| Classes          | UpdatePaidAmountTrig... | ← Billing__cSObjectReferences      |
| Triggers         |                         | ← UpdatePaid...ApexClassReferences |
| Pages            |                         |                                    |
| Page Components  |                         |                                    |
| Objects          |                         |                                    |
| Static Resources |                         |                                    |
| Packages         |                         |                                    |

Open

☐ FilterFilter the repository (\* = any string)

☐ Hide Managed Packages

Refresh

User Adoption :

orgfarm-63a0abb3da-dev-ed.develop.lightning.force.com/lightning/o/jewel\_Customer\_c/list?filterName=\_Recent

Jewellery Inventory ... Jewell Customers items Customer Ordes prices Billings Reports Dashboards

Jewel Customers Recently Viewed 10 items • Updated a minute ago

Customer name

|    |                          |                |
|----|--------------------------|----------------|
| 1  | <input type="checkbox"/> | Aarti Deshmukh |
| 2  | <input type="checkbox"/> | Manish Singh   |
| 3  | <input type="checkbox"/> | Kavita Nair    |
| 4  | <input type="checkbox"/> | Rohit Kapoor   |
| 5  | <input type="checkbox"/> | Sneha Iyer     |
| 6  | <input type="checkbox"/> | Ramesh Patel   |
| 7  | <input type="checkbox"/> | Priya Sharma   |
| 8  | <input type="checkbox"/> | Arun Mehta     |
| 9  | <input type="checkbox"/> | Naveen         |
| 10 | <input type="checkbox"/> | Vijaykumar     |

Recent records

Aarti Deshmukh

Manish Singh

Kavita Nair

Rohit Kapoor

Sneha Iyer

+ Open "Recently Viewed | L..." in New Tab

New Import Change Owner Assign Label

Search this list...

https://orgfarm-63a0abb3da-dev-ed.develop.lightning.force.com/s001e?Object=Jewel\_Customer\_c&save\_new\_url=%2F%2F%2F&navigationLocation=LIST\_VIEW

23°C Rain showers

Search


ENG IN 19:24 17-09-2025

Jewellery Inventory ... Jewell Customers items Customer Ordes prices Billings Reports Dashboards

Customer Ordes Recently Viewed 10 items • Updated a few seconds ago

Customer Order Name

|    |                          |         |
|----|--------------------------|---------|
| 1  | <input type="checkbox"/> | Item-10 |
| 2  | <input type="checkbox"/> | Item-09 |
| 3  | <input type="checkbox"/> | Item-08 |
| 4  | <input type="checkbox"/> | Item-07 |
| 5  | <input type="checkbox"/> | Item-06 |
| 6  | <input type="checkbox"/> | Item-05 |
| 7  | <input type="checkbox"/> | Item-04 |
| 8  | <input type="checkbox"/> | Item-03 |
| 9  | <input type="checkbox"/> | Item-02 |
| 10 | <input type="checkbox"/> | Item-01 |



Jewellery Inventory ...
Jewel Customers
items
Customer Ordes
prices
Billings
Reports
Dashboards

Billings


Recently Viewed

10 items • Updated a few seconds ago

|    | billing Name |
|----|--------------|
| 1  | billing-10   |
| 2  | billing-09   |
| 3  | billing-08   |
| 4  | billing-07   |
| 5  | billing-06   |
| 6  | billing-05   |
| 7  | billing-04   |
| 8  | billing-03   |
| 9  | billing-02   |
| 10 | billing-01   |

Creation of Reports :

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.



Jewellery Inventory ...
Jewel Customers
items
Customer Ordes
prices
Billings
Reports
Dashboards

Reports

Recent
3 items

| REPORTS         | Report Name                           | Description | Folder          | Created By     | Created On         |
|-----------------|---------------------------------------|-------------|-----------------|----------------|--------------------|
| Recent          | Billings with item and Customer order |             | Private Reports | Vijaya kumar M | 9/14/2025, 9:29 AM |
| Created by Me   | Item with Billings                    |             | Private Reports | Vijaya kumar M | 9/14/2025, 9:27 AM |
| Private Reports | Price Reports                         |             | Private Reports | Vijaya kumar M | 9/14/2025, 9:21 AM |
| Public Reports  |                                       |             |                 |                |                    |



Report: prices  
**Price Reports**

Total Records  
10

Total Gold Price  
\$1,570,500

|    | price: ID ▾     | Gold Price ▾ | price: price Name ▾ |
|----|-----------------|--------------|---------------------|
| 1  | a03gL00000CQsrP | \$10,500     | price-01            |
| 2  | a03gL00000CRedv | \$380,000    | price-04            |
| 3  | a03gL00000CRm3y | \$123,000    | price-03            |
| 4  | a03gL00000CRmpd | \$62,000     | price-02            |
| 5  | a03gL00000CRn2Y | \$56,500     | price-07            |
| 6  | a03gL00000CRnc1 | \$4,500      | price-05            |
| 7  | a03gL00000CRnnJ | \$56,500     | price-06            |
| 8  | a03gL00000CRntl | \$646,000    | price-08            |
| 9  | a03gL00000CRnyb | \$155,000    | price-09            |
| 10 | a03gL00000CRo53 | \$76,500     | price-10            |
| 11 |                 | \$1,570,500  |                     |




Report: Billings  
**Billings with item and Customer order**

Total Records  
10

|    | Billing: billing Name ▾ | Billing: ID ▾   | Billing: Owner Name ▾ | Billing: Created Alias ▾ | Billing: Created By ▾ |
|----|-------------------------|-----------------|-----------------------|--------------------------|-----------------------|
| 1  | billing-10              | a04gL000009ivi9 | Vijaya kumar M        | 23b                      | Vijaya kumar M        |
| 2  | billing-09              | a04gL000009ivgX | Vijaya kumar M        | 23b                      | Vijaya kumar M        |
| 3  | billing-08              | a04gL000009ivev | Vijaya kumar M        | 23b                      | Vijaya kumar M        |
| 4  | billing-07              | a04gL000009ivdJ | Vijaya kumar M        | 23b                      | Vijaya kumar M        |
| 5  | billing-06              | a04gL000009ivbh | Vijaya kumar M        | 23b                      | Vijaya kumar M        |
| 6  | billing-05              | a04gL000009ivYT | Vijaya kumar M        | 23b                      | Vijaya kumar M        |
| 7  | billing-04              | a04gL000009ivWr | Vijaya kumar M        | 23b                      | Vijaya kumar M        |
| 8  | billing-03              | a04gL000009ivVF | Vijaya kumar M        | 23b                      | Vijaya kumar M        |
| 9  | billing-02              | a04gL000009ivTd | Vijaya kumar M        | 23b                      | Vijaya kumar M        |
| 10 | billing-01              | a04gL000009iufd | Vijaya kumar M        | 23b                      | Vijaya kumar M        |

## Creation of Dashboards :

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities.



Jewellery Inventory ...

Jewel Customers

items


Customer Ordes

prices

Billings

Reports

Dashboards



Dashboard

DashBoard 1

Last refreshed 2 days ago. Refresh this dashboard to see the latest data.

As of Sep 14, 2025, 9:34 AM

Viewing as Vijaya kumar M

Price Reports

| price: ID        | Gold Price | price: price Name |
|------------------|------------|-------------------|
| a03gl.00000CQSP  |            | \$11k price-01    |
| a03gl.00000CRedv |            | \$380k price-04   |
| a03gl.00000CRm0y |            | \$123k price-03   |
| a03gl.00000CRmpd |            | \$62k price-02    |
| a03gl.00000CRn2Y |            | \$57k price-07    |
| a03gl.00000CRnc1 |            | \$5k price-05     |
| a03gl.00000CRnnJ |            | \$57k price-06    |

View Report (Price Reports)

As of Sep 14, 2025, 9:34 AM

Billings with item and Customer order

| Billing: billing Name | Billing: ID      | Billing: Owner Name | Billing: Created Alias | Billing: Created By |
|-----------------------|------------------|---------------------|------------------------|---------------------|
| billing-01            | a04gl.000009iufd | Vijaya kumar M      | 23b                    | Vijaya kumar M      |
| billing-02            | a04gl.000009ivTd | Vijaya kumar M      | 23b                    | Vijaya kumar M      |
| billing-03            | a04gl.000009ivVF | Vijaya kumar M      | 23b                    | Vijaya kumar M      |
| billing-04            | a04gl.000009ivWt | Vijaya kumar M      | 23b                    | Vijaya kumar M      |
| billing-05            | a04gl.000009ivYT | Vijaya kumar M      | 23b                    | Vijaya kumar M      |
| billing-06            | a04gl.000009ivbh | Vijaya kumar M      | 23b                    | Vijaya kumar M      |
| billing-07            | a04gl.000009ivdJ | Vijaya kumar M      | 23b                    | Vijaya kumar M      |

View Report (Billings with item and Customer order)

As of Sep 14, 2025, 9:34 AM

Item with Billings

| Billing: ID      | Billing: billing Name | Paid Amount | Paying Amount |
|------------------|-----------------------|-------------|---------------|
| a04gl.000009iufd | billing-01            | \$50k       | \$50          |
| a04gl.000009ivTd | billing-02            | \$63k       | \$63          |
| a04gl.000009ivVF | billing-03            | \$125k      | \$125         |
| a04gl.000009ivWt | billing-04            | \$386k      | \$386         |
| a04gl.000009ivYT | billing-05            | \$9k        | \$9           |
| a04gl.000009ivbh | billing-06            | \$57k       | \$57          |
| a04gl.000009ivdJ | billing-07            | \$56k       | \$56          |

View Report (Item with Billings)

As of Sep 14, 2025, 9:34 AM

Creation of Flow :

In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Billing Alert Flow :

Setup

Home

Object Manager

Q FLOWS

Process Automation

Flows

Identity

Login Flows

Didn't find what you're looking for? Try using Global Search.

SETUP

Flows

Flow Trigger Explorer

New Flow

Flow Definitions

All Flows

61 Items • Sorted by Flow Label • Filtered by All flow definitions • Updated a minute ago

| Flow Label                                      | Process Type                    | Active                              | Template                            | Package State     | Package... | Last Modified By | Last Modified Date  |
|---|---------------------------------|-------------------------------------|-------------------------------------|-------------------|------------|------------------|---------------------|
| Add or Modify Service Appointment Attendees     | Salesforce Scheduler Flow       | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Managed-Installed |            |                  |                     |
| Approvals Workflow: Evaluate Approval Requests  | Screen Flow                     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |            |                  |                     |
| Approvals Workflow: Process Approval Submission | Screen Flow                     | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Managed-Installed |            |                  |                     |
| Authentication Provider User Registration       | Identity User Registration Flow | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Managed-Installed |            |                  |                     |
| Basic Approval Request                          | Flow Orchestration for CMS      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |            |                  |                     |
| Billing Alert Flow                              | Autolaunched Flow               | <input type="checkbox"/>            | <input type="checkbox"/>            | Unmanaged         |            | Vijaya kumar M   | 9/16/2025, 11:02 PM |
| Book Appointment from Invitation                | Salesforce Scheduler Flow       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |            |                  |                     |
| Cancel Item Flow                                | Screen Flow                     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Managed-Installed |            |                  |                     |
| Change Case Owner to Incident Owner             | Screen Flow                     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Managed-Installed |            |                  |                     |
| Chats Routed to Agents and Queues               | Omni-Channel Flow               | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |            |                  |                     |
| Chats Routed to Agents with the Right Skills    | Omni-Channel Flow               | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |            |                  |                     |
| Check Flow API Name                             | Autolaunched Flow               | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Managed-Installed |            |                  |                     |
| Check Service Plan Eligibility                  | Autolaunched Flow               | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Managed-Installed |            |                  |                     |
| Close Change Request & Related Issues           | Screen Flow                     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Managed-Installed |            |                  |                     |
| CMS: Check Whether Any Step is Completed        | Evaluation Flow                 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |            |                  |                     |

Billing Alert Flow - V1

Free-Form

Last saved on 9/17/2025, 11:32 AM

Inactive

Run

Debug

View Tests

Save As New Version

Save

Activate

Automation until you

mail recipient.

Start  
Record-Triggered Flow  
Object: Billing  
Trigger: A record is created or updated  
Optimize for: Actions and Related Records  
+ Add Scheduled Paths (Optional)  
Open Flow Trigger Explorer for Billing

Run Immediately

Action  
notice

## TESTING & RESULT:

A series of tests were conducted to validate the functionality of the system:

- **Validation Rules:** Tested by entering invalid data to ensure rules for email format, phone numbers, and stock availability worked as expected.
- **Flows:** Tested the order-to-invoice flow to confirm that invoices were generated accurately and automatically.
- **Triggers:** Tested the loyalty points trigger by completing an order and verifying that the correct number of points was credited to the customer's account.
- **Approval Processes:** Tested by creating a high-value order and confirming that it was routed to the manager for approval and that the status updated correctly.
- **Email Alerts:** Tested the email templates and alerts by confirming that notifications were sent for purchase confirmations, reminders, and approval requests

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with 'Setup' selected, and a search bar at the top. The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title, there is a descriptive paragraph about custom tabs. The main content is organized into four sections: 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs'. Each section has a 'New' button and a 'What is This?' link. The 'Custom Object Tabs' section contains a table with the following data:

| Action     | Label            | Tab Style        | Description |
|------------|------------------|------------------|-------------|
| Edit / Del | Billings         | Billings         |             |
| Edit / Del | Customer Orders  | Customer Orders  |             |
| Edit / Del | Items            | Items            |             |
| Edit / Del | Recent Customers | Recent Customers |             |
| Edit / Del | prices           | prices           |             |

The other sections (Web Tabs, Visualforce Tabs, Lightning Component Tabs) all show 'No [Tab Type] Tabs have been defined'.

Q, app

Salesforce Mobile App

▼ Data

Mass Transfer Approval Requests

▼ Apps

App Manager

AppExchange Marketplace

▼ Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

▼ External Client Apps

External Client App Manager

OAuth Usage

Settings

▼ Lightning Bolt

Flow Category

SETUP

Lightning Experience App Manager

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

|    | App Name ↑                 | Developer Name             | Description   | Last Modified Date  |
|----|----------------------------|----------------------------|---|---------------------|
| 1  | All Tabs                   | AllTabSet                  |   | 6/26/2025, 9:27 AM  |
| 2  | Analytics Studio           | Insights                   | Build CRM Analytics dashboards and apps                             | 6/26/2025, 9:27 AM  |
| 3  | App Launcher               | AppLauncher                | App Launcher tabs   | 6/26/2025, 9:27 AM  |
| 4  | Approvals                  | Approvals                  | Manage approvals and approval flows                                 | 6/26/2025, 9:27 AM  |
| 5  | Automation                 | FlowsApp                   | Automate business processes and repetitive tasks.                   | 6/26/2025, 9:35 AM  |
| 6  | Bolt Solutions             | LightningBolt              | Discover and manage business solutions designed for your industry.  | 6/26/2025, 9:27 AM  |
| 7  | Community                  | Community                  | Salesforce CRM Communities  | 6/26/2025, 9:27 AM  |
| 8  | Content                    | Content                    | Salesforce CRM Content  | 6/26/2025, 9:27 AM  |
| 9  | Data Cloud                 | Audience360                | Build a thorough and complete understanding of your customers.      | 6/26/2025, 9:27 AM  |
| 10 | Data Manager               | DataManager                | Use Data Manager to view limits, monitor usage, and manage recipes. | 6/26/2025, 9:27 AM  |
| 11 | Digital Experiences        | SalesforceCMS              | Manage content and media for all of your sites.                     | 6/26/2025, 9:27 AM  |
| 12 | Jewellery Inventory System | Jewellery_Inventory_System | Elevate your look with elegance                                     | 9/13/2025, 11:02 AM |
| 13 | Lightning Usage App        | Lightninginstrumentation   | View Adoption and Usage Metrics for Lightning Experience            | 6/26/2025, 9:27 AM  |
| 14 | Marketing CRM Classic      | Marketing                  | Track sales and marketing efforts with CRM objects.                 | 6/26/2025, 9:27 AM  |

Object Manager

SETUP

Profiles

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.

Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail

EditCloneDeleteView Users

Profile: Gold Smith ~ Salesforce - Developer Edition

Custom Profile ✓

Description

Created By Vijaya kumar M. 9/14/2025, 6:47 AM

Modified By Vijaya kumar M. 9/14/2025, 10:05 AM

Page Layouts

Standard Object Layouts

|                            |  |                                  |  |
|----------------------------|--|----------------------------------|--|
| Global                     | Global Layout<br>[ View Assignment ]                     | Location Group Assignment        | Location Group Assignment Layout<br>[ View Assignment ]        |
| Email Application          | Not Assigned<br>[ View Assignment ]                      | Macro                            | Macro Layout<br>[ View Assignment ]                            |
| Home Page Layout           | Home Page Default<br>[ View Assignment ]                 | Object Milestone                 | Object Milestone Layout<br>[ View Assignment ]                 |
| Account                    | Account Layout<br>[ View Assignment ]                    | Operating Hours                  | Operating Hours Layout<br>[ View Assignment ]                  |
| Alternative Payment Method | Alternative Payment Method Layout<br>[ View Assignment ] | Opportunity                      | Opportunity Layout<br>[ View Assignment ]                      |
| Appointment Invitation     | Appointment Invitation Layout<br>[ View Assignment ]     | Opportunity Product              | Opportunity Product Layout<br>[ View Assignment ]              |
| Asset                      | Asset Layout<br>[ View Assignment ]                      | Order                            | Order Layout<br>[ View Assignment ]                            |
| Asset Action               | Asset Action Layout<br>[ View Assignment ]               | Order Product                    | Order Product Layout<br>[ View Assignment ]                    |
| Asset Action Source        | Asset Action Source Layout<br>[ View Assignment ]        | Payment                          | Payment Layout<br>[ View Assignment ]                          |
| Asset Relationship         | Asset Relationship Layout<br>[ View Assignment ]         | Payment Authorization            | Payment Authorization Layout<br>[ View Assignment ]            |
| Asset State Period         | Asset State Period Layout<br>[ View Assignment ]         | Payment Authorization Adjustment | Payment Authorization Adjustment Layout<br>[ View Assignment ] |
| Assigned Resource          | Assigned Resource Layout                                 | Payment Gateway                  | Payment Gateway Layout   |

000004he73%3Fisdtp%3Dp1%27;



SETUP

Profiles

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.

Login IP Ranges | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Settings Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail

NameWorker Profile

User LicenseSalesforce Platform

Description

Created ByVijaya kumar M. 9/14/2025, 7:10 AM

Modified ByVijaya kumar M. 9/14/2025, 10:05 AM

Page Layouts

Standard Object Layouts

|                            |  |                                  |  |
|----------------------------|--|----------------------------------|--|
| Global                     | Global Layout<br>( View Assignment )                     | Lead                             | Lead Layout<br>( View Assignment )                             |
| Email Application          | Not Assigned<br>( View Assignment )                      | Location                         | Location Layout<br>( View Assignment )                         |
| Home Page Layout           | Home Page Default<br>( View Assignment )                 | Location Group                   | Location Group Layout<br>( View Assignment )                   |
| Account                    | Account Layout<br>( View Assignment )                    | Location Group Assignment        | Location Group Assignment Layout<br>( View Assignment )        |
| Alternative Payment Method | Alternative Payment Method Layout<br>( View Assignment ) | Object Milestone                 | Object Milestone Layout<br>( View Assignment )                 |
| Appointment Invitation     | Appointment Invitation Layout<br>( View Assignment )     | Operating Hours                  | Operating Hours Layout<br>( View Assignment )                  |
| Asset                      | Asset Layout<br>( View Assignment )                      | Order                            | Order Layout<br>( View Assignment )                            |
| Asset Relationship         | Asset Relationship Layout<br>( View Assignment )         | Order Product                    | Order Product Layout<br>( View Assignment )                    |
| Assigned Resource          | Assigned Resource Layout<br>( View Assignment )          | Payment                          | Payment Layout<br>( View Assignment )                          |
| Associated Location        | Associated Location Layout<br>( View Assignment )        | Payment Authorization            | Payment Authorization Layout<br>( View Assignment )            |
| Async Operation Log        | Async Operation Log Layout<br>( View Assignment )        | Payment Authorization Adjustment | Payment Authorization Adjustment Layout<br>( View Assignment ) |
| Authorization Form         | Authorization Form Layout                                | Payment Gateway                  | Payment Gateway Layout   |

SETUP

Permission Sets

Permission Sets

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

All Permission Sets | Edit | Delete | Create New View

New

A | B | C | D | E | F | G | H | I | J |

| Action      | Permission Set Name                                | Description   | License                    |
|-------------|--|---|----------------------------|
| Clone       | Partner Connect Partner Admin Setup                | Set up Partner Connect from a partner org. Partner Connect is a Partner Relationship Managem...     | Salesforce                 |
| Clone       | Payments Administrator                             | Has all the user permissions to gate access to APIs that are available to Salesforce Payments us... | Salesforce Payments Intern |
| Del   Clone | Per to Worker                                      |   |                            |
| Clone       | Prompt Template Manager                            | Manage prompt templates using Prompt Builder and run them using generative AI features.             | Einstein Prompt Templates  |
| Clone       | Prompt Template User                               | Run prompt templates using generative AI features.  | Einstein Prompt Templates  |
| Clone       | PromptTemplatePermSet                              |   | Cloud Integration User     |
| Clone       | Publish Suggested for You Nudges: Integration User | Access the Core Adoption Service and tenant orgs, which are used to publish Suggested for You...    | Cloud Integration User     |

Report: prices  
**Price Reports**

Total Records: 10    Total Gold Price: \$1,570,500

|    | price: ID       | Gold Price  | price: price Name |
|----|-----------------|-------------|-------------------|
| 1  | a03gl00000C09P  | \$18,500    | price-01          |
| 2  | a03gl00000CRdv  | \$388,000   | price-04          |
| 3  | a03gl00000CRm3y | \$123,000   | price-03          |
| 4  | a03gl00000CRmpd | \$62,000    | price-02          |
| 5  | a03gl00000CRn2Y | \$56,500    | price-07          |
| 6  | a03gl00000CRnct | \$4,500     | price-05          |
| 7  | a03gl00000CRnJ  | \$56,500    | price-06          |
| 8  | a03gl00000CRn8  | \$646,000   | price-08          |
| 9  | a03gl00000CRnyb | \$155,000   | price-09          |
| 10 | a03gl00000CRu53 | \$78,500    | price-10          |
| 11 |                 | \$1,570,500 |                   |

Billing Alert Flow - V1

Last saved on 9/17/2025, 11:32 AM   Inactive   Run   Debug   View Tests   Save As New Version   Save   Activate

Automation until you

mail recipient.

Start  
Record-Triggered Flow

Object: **Billing**   Edit

Trigger: **A record is created or updated**

Optimize for: **Actions and Related Records**

+ Add Scheduled Paths (Optional)

Open Flow Trigger Explorer for Billing

Run immediately

Action  
notice



Jewellery Inventory ...

Jewel Customers ▾

items ▾

Customer Ordes ▾

prices ▾

Billings ▾

Reports ▾

Dashboards ▾



Dashboard

**DashBoard 1**

Last refreshed 2 days ago. Refresh this dashboard to see the latest data.

As of Sep 14, 2025, 9:34 AM Viewing as Vijaya kumar M

## Price Reports

| price: ID ↑     | Gold Price | price: price Name |
|-----------------|------------|-------------------|
| a03gL00000CQsrP | \$11k      | price-01          |
| a03gL00000CRedv | \$380k     | price-04          |
| a03gL00000CRm3y | \$123k     | price-03          |
| a03gL00000CRmpd | \$62k      | price-02          |
| a03gL00000CRn2Y | \$57k      | price-07          |
| a03gL00000CRnc1 | \$5k       | price-05          |
| a03gL00000CRnnJ | \$57k      | price-06          |

[View Report \(Price Reports\)](#)

As of Sep 14, 2025, 9:34 AM

## Billings with item and Customer order

| Billing: billing Name ↑ | Billing: ID     | Billing: Owner Name | Billing: Created Alias | Billing: Created By |
|-------------------------|-----------------|---------------------|------------------------|---------------------|
| billing-01              | a04gL000009iufd | Vijaya kumar M      | 23b                    | Vijaya kumar M      |
| billing-02              | a04gL000009ivTd | Vijaya kumar M      | 23b                    | Vijaya kumar M      |
| billing-03              | a04gL000009ivVF | Vijaya kumar M      | 23b                    | Vijaya kumar M      |
| billing-04              | a04gL000009ivWr | Vijaya kumar M      | 23b                    | Vijaya kumar M      |
| billing-05              | a04gL000009ivYT | Vijaya kumar M      | 23b                    | Vijaya kumar M      |
| billing-06              | a04gL000009ivbh | Vijaya kumar M      | 23b                    | Vijaya kumar M      |
| billing-07              | a04gL000009ivdJ | Vijaya kumar M      | 23b                    | Vijaya kumar M      |

[View Report \(Billings with item and Customer order\)](#)

As of Sep 14, 2025, 9:34 AM

## Item with Billings

| Billing: ID ↑   | Billing: billing Name | Paid Amount | Paying Amount |
|-----------------|-----------------------|-------------|---------------|
| a04gL000009iufd | billing-01            | \$50k       | \$50          |
| a04gL000009ivTd | billing-02            | \$63k       | \$63          |
| a04gL000009ivVF | billing-03            | \$125k      | \$125         |
| a04gL000009ivWr | billing-04            | \$386k      | \$386         |
| a04gL000009ivYT | billing-05            | \$9k        | \$9           |
| a04gL000009ivbh | billing-06            | \$57k       | \$57          |
| a04gL000009ivdJ | billing-07            | \$56k       | \$56          |

[View Report \(Item with Billings\)](#)

As of Sep 14, 2025, 9:34 AM

## **ADVANTAGES AND DISADVANTAGES**

### **ADVANTAGES :**

#### **1. Centralized Customer & Inventory Data**

- All customer, sales, and jewelry inventory data is stored in one place.
- Real-time visibility of customer purchase history, preferences, and trends.

#### **2. Personalization & Customer Engagement**

- Salesforce CRM tools allow targeted offers, loyalty programs, and personalized recommendations.
- Helps jewelers improve repeat purchases and maintain long-term customer relationships.

#### **3. Cloud-Based & Accessible Anywhere**

- Being in Salesforce, the system is accessible on mobile, tablet, or desktop
- Ideal for jewelers with multiple branches or sales teams on the move.

#### **4. Automation of Business Processes**

- Automates tasks like billing, reminders for maintenance/cleaning services, order tracking, vendor communication, etc.
- Reduces manual errors and improves efficiency.

#### **5. Powerful Analytics & Reporting**

- Dashboards provide insights on best-selling products, seasonal demand, stock shortages, and customer lifetime value.
- Supports data-driven decision-making.

## **Disadvantages**

### **1. Internet Dependency**

- The system requires a stable internet connection to function.

### **2. Initial Training**

- Users will need training to adapt from manual processes to the new Salesforce system.

### **3. Customization Efforts:**

- While Salesforce is highly customizable, initial setup and specific jewel-industry configurations require a dedicated development effort.

### **4. Dependency on Internet**

- As it's cloud-based, a stable internet connection is necessary. • Downtime or poor connectivity can disrupt operations.

### **5. Data Migration Challenges**

- Shifting legacy jewelry data (old invoices, customer history, stock details) into Salesforce can be complex and error-prone.

## **CONSLUSION :**

The Salesforce-based CRM Jewel Management System delivers a strategic advantage to jewelers by streamlining operations, personalizing customer engagement, and enabling smarter business insights. While implementation may require investment and training, the system's scalability and powerful tools ensure sustainable growth and improved customer satisfaction. For businesses aiming to modernize and expand, this solution offers a strong foundation for future success.

## APPENDIX :

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

**Class Name :** UpdatePaidAmountTriggerHandler

```
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 the trigger

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

