

Project Title :- CRM

JEWELRY

COLLEGE:-

Sri shankrananda Giri Swamy Degree college

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(1) Project Overview:-

A “CRM Jewelry Management project” aims to achieve several key objectives that ultimately contribute to the growth and efficiency of a jewelry business. The system specifically designed for jewelry business, allowing them To effectively track customer interactions, manage sales leads, and personalize marketing efforts optimize customer relationship and boost sales within the jewelry industry.

- Capture detailed customer information including demographics, purchase history, preferred jewelry types, special occasions, and contact details
- Store and update customer data in real time to maintain accuracy

the purpose of a CRM (Customer Relationship Management) system is to help businesses manage and improve their interactions with customers and potential customers. This overarching goal breaks down into several key objectives.

CRM, or Customer Relationship Management, is a multifaceted concept that's essential for modern businesses. It's not just a piece of software it's a strategic approach to how a company interacts with its customers.

The relationship between CRM (Customer Relationship Management) and CLV (Customer Lifetime Value) is very strong. CRM systems provide the tools and data necessary to effectively calculate, track, and ultimately increase CLV.

(2) Objectives :-

Business Goals :

The primary objectives of a Customer Relationship Management (CRM) system are to enhance customer satisfaction, increase sales, improve customer retention, and build strong customer loyalty by effectively managing customer interactions and data across all touchpoints, ultimately achieving business goals like increased revenue, market share, and profitability.

CRM (Customer Relationship Management) systems serve a variety of business goals, all designed to improve customer interactions and drive growth.

The four main objectives of a CRM

- ❖ Increase customer retention.
- ❖ Shorten the sales cycle.
- ❖ Increase sales.
- ❖ Decrease customer acquisition.

Specific outcomes :-

A CRM implementation for a jewelry business aims to drive tangible results through enhanced customer engagement and operational efficiency. There are unique considerations that will influence the specific outcomes and key deliveries.

(3) Salesforce Key Features and Concepts Utilized:-

Salesforce is a cloud-based CRM platform that provides various features and concepts to help businesses manage customer relationships, sales, and operations. Here are some key features and concepts utilized in Salesforce

- ❖ Key features of Salesforce CRM include: contact management, lead management, opportunity management, sales forecasting, reporting and dashboards, automation through workflows, collaboration tools, cloud-based access, mobile accessibility, AI integration, campaign management, and a single source of truth for customer data, allowing businesses to track and manage customer interactions across all channels effectively; with core concepts like lead qualification, opportunity stages, and customer lifecycle management central to the platform.

★ We used the following **Objects** :-

- ❖ Jewel Customer
- ❖ Items
- ❖ Billing
- ❖ Prices
- ❖ Customer order

★ We used **Tabs** such as

- ❖ Jewel Customer Tab
- ❖ Item Tab .. Etc.

★ We Created a Lightning App :- Jewellery Inventory System

➤ We Created Fields such as :-

- ◆ *Lookup Relationship*
- ◆ *Master-Detailed Relationship*
- ◆ *Text, Phone, Email Fields in Jewel Customer Object*
- ◆ *Number Picklist Fields in Item Object*
- ◆ *Currency Fields in Price Object*
- ◆ *Formula Field (cross object)in Item Object*

- ♦ ***Also Created some other Fields.***

★Schema Builder:-

The schema builder is a simple graphical interface for visualizing and editing the data model of your Org. The schema builder can get all fields from an Object, perform basic impact analysis of changes to an Object, and show all dependencies on an Object.

→ We Entered object as :-

- ❖ Jewel Customer
- ❖ Items
- ❖ Customer order
- ❖ Prices
- ❖ Billing in Schema Builders

★Field Dependencies:-

Field dependency can refer to a cognitive style, a relationship between fields in a dialog, or a dependency injection technique. Field Dependencies are used to create relationships between fields within an object. They allow you to control the visibility and availability of fields based on the values selected in other fields.

We created New Field Dependencies, controlling as "Priority"& Depending Field as "Expecting Days of Return".

★Validation Rules :-

A validation rule is one way to restrict input in a table field or a control on a form. Validation text lets you provide a message to help users who input data that is not valid.

Created the validation rule for Postal Code field in Jewel Customer object.

★ Profiles:

We Created 2 Profiles:

- **Gold Smith profile**
- **Worker profile**

★ Roles:-

Salesforce roles are record-level access controls that define what data a user can see in Salesforce. roles can be used to determine the visibility access of the user and the data they can access in your Salesforce CRM organization.

Added Goldsmith role in CEO Role & Added Worker Role which reports to Goldsmith.

★ Users: -

A user in Salesforce is anyone who logs in to the platform, including employees, customers, partners, and automated users.

- ★ **Niklaus Mikaelson in Goldsmith Profile**
- ★ **Kol Mikaelson in Worker Profile**
- ★ **2 more Users in Worker Profile**

★ Page Layouts: -

Page layouts control the layout and organization of buttons, fields, s-controls, Visualforce, custom links, and related lists on object record pages. They also help determine which fields are visible, read only,

and required. Use page layouts to customize the content of record pages for your users.

Created 2 Page layouts in Item object named as: -

- ❖ “Page Layout for Gold”
- ❖ “Page layout for Silver”

★ 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.

Created Record Types in Item Object labeled as Gold & Silver.

★ Permission sets: -

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' function.

We Created New Permission Sets & Labeled it as “Per to Worker “ And in Item Object we enabled Gold & Silver object permission we selected “Read, Edit & Create “. We added Assignments which we used under Worker Profile users.

★ User Adoption: -

User adoption, or onboarding, is the process of customers or new users getting used to a product or service and then deciding to keep using it because it makes a task or goal.

In Jewelry Inventory System we created Jewel Customers under Jewel Customer tab. We created some Records under “Item, Prices, Customer orders & Billing”.

★ 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.

We created 3 reports:

- **Prices Report**
- **Billings with item and Customer order Report.**
- **Item with Billings Report**

★ Dashboards:

We created dashboards under “Item with Billings Report”, “Billings with item and Customer order Report”, “Prices Report”.

★ Flows:

Flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens

We selected Record Triggered flow and “Selected the Object as a “Billing” in the Drop-down list. Selected the Trigger Flow where as “A record is Created or Updated”. Selected the Optimize the flow for: “Actions and Related Records”.

(4) Detailed steps to Solution Design: -

We created objects:

- ◆ Jewel customer
- ◆ Item
- ◆ Billings
- ◆ Prices
- ◆ Customer Order

WhatsApp | Project Title CRM.docx - Microsoft Word | Smartinternz | Items | Salesforce

<https://ssgsdegreecollege-8e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS000002yl4X/FieldsAndRelationships/view>

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Items

Details		Fields & Relationships				
		24 Items, Sorted by Field Label				
		FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Fields & Relationships		Amount	Amount_c	Formula (Currency)		
Page Layouts		Billing with item and Customer order	Billing_with_item_and_Customer_order_c	Lookup(Items)	✓	
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	Item_c	Picklist		
Record Types						
Related Lookup Filters						
Search Layouts						



WhatsApp web - Search | WhatsApp | Completion Certificate | SkillsBuild | Jewel Customer | Salesforce

<https://ssgsdegreecollege-8e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS000002yktF/FieldsAndRelationships/view>

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Jewel Customer

Details		Fields & Relationships				
		22 Items, Sorted by Field Label				
Fields & Relationships		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		Customer	Customer_c	Lookup(Jewel Customer)	✓	
Field Sets		Customer Name	Customer_Name_c	Lookup(Jewel Customer)	✓	
Object Limits		Customer Name	Name	Text(80)	✓	
Record Types		Data type	Data_type_c	Text(20)		
Related Lookup Filters						
Search Layouts						



The screenshot shows the Salesforce Object Manager Fields & Relationships page for the Billing object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, Buttons, etc. The main area displays a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Bi Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Gold/Silver Price	Gold_Silver_Price__c	Formula (Currency)		
Item	Item__c	Lookup(Items)		✓
KDM Charge	KDM_Charge__c	Formula (Currency)		
Last Modified By	LastModifiedById	Lookup(User)		

We used to 2 Profiles: -

- *Gold Smith Profile*
- *Worker profile*

Salesforce Setup Page (Profile Edit - worker)

The screenshot shows the Salesforce Setup interface for editing a user profile named "worker".

Profile Edit - worker

Set the permissions and page layouts for this profile.

Profile Edit

Name	Value	Action
Name	worker	Save
User License	Salesforce Platform	Save & New
Description		Cancel

Custom App Settings

App	Visible	Default	App	Visible	Default
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>
Jewelry Inventory System (Jewelry_Inventory_System)	<input type="checkbox"/>	<input type="radio"/>			

Service Provider Access

Required Information:

Service	Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="radio"/>
My Service Journey (standard__MSJApp)	<input checked="" type="checkbox"/>	<input type="radio"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>

Help for this Page [?](#)

Windows Taskbar:

- Type here to search
- Clapboard icon
- File Explorer icon
- Microsoft Edge icon
- Google Chrome icon
- File icon
- 18:17 02-03-2025

Salesforce Setup Page (Profile Edit - Gold Smith)

The screenshot shows the Salesforce Setup interface for editing a user profile named "Gold Smith".

Profile Edit - Gold Smith

Set the permissions and page layouts for this profile.

Profile Edit

Name	Value	Action
Name	Gold Smith	Save
User License	Salesforce	Save & New
Description		Cancel

Custom App Settings

App	Visible	Default	App	Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	My Service Journey (standard__MSJApp)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>

Help for this Page [?](#)

Windows Taskbar:

- Type here to search
- Clapboard icon
- File Explorer icon
- Microsoft Edge icon
- Google Chrome icon
- File icon
- 18:19 02-03-2025

Lighting App: -

The screenshot shows a web browser window with multiple tabs open. The active tab is a Lightning App titled "Jewelry Inventory S..." under "Jewel Customers". The page displays a list of recently viewed customers, sorted by Customer Name. The list includes:

Customer Name
Nazma
Dharani
Mikaelson
Anitha

The browser's address bar shows the URL: https://ssgsdegreecollege-8e-dev-ed.develop.lightning.force.com/lightning/o/Jewel_Customer__c/list?filterName=_Recent. The status bar at the bottom right indicates the time as 18:24 and the date as 02-03-2025.

Roles: -

Screenshot of the Salesforce Setup interface showing the Roles page for the 'Gold Smith' role.

Role Detail:

Label	Value	Role Name	Value
This role reports to	SVP_Sales & Marketing	Role Name as displayed on reports	Gold_Smith
Modified By	Kunuba Sirisha Team	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

Users in Gold Smith Role:

Action	Full Name	Alias	Username	Active
Edit	Niklaus Mikelson	nmika	sirisha@123@gmail.com	<input checked="" type="checkbox"/>

Hierarchy: SSGS degree college > CEO > SVP_Sales & Marketing > Gold Smith
Siblings: VP_North American Sales, VP_Marketing, VP_International Sales

Help for this Page

Screenshot of the Salesforce Setup interface showing the 'Creating the Role Hierarchy' page.

Your Organization's Role Hierarchy:

- SSGS degree college
 - Add Role
 - CEO
 - CFO
 - COO
 - SVP,Customer Service & Support
 - Customer Support, International
 - Customer Support, North America
 - Installation & Repair Services
 - SVD_Human Resources

Help for this Page

Users: -

- Niklaus Mikaelson
- Kol Mikaelson

The screenshot shows the Salesforce Setup interface with the URL <https://ssgsdegreecollege-8e-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005NS00000HqzqP%2Fe%3FisUserEntityO...>. The page title is "Users | Salesforce". The left sidebar shows the "Users" section selected under "User Management Settings". The main content area displays the "User Edit" screen for "Niklaus Mikaelson". The user's first name is "Niklaus", last name is "Mikaelson", alias is "nmika", email is "mugithidharani@gmail.com", and username is "sirisha@123gmail.com". The role is "Gold Smith", user license is "Salesforce", profile is "Gold Smith", and active status is checked. Other options like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User are listed but unchecked.

The screenshot shows the Salesforce Setup interface with the same URL as the previous screenshot. The page title is "Users | Salesforce". The left sidebar shows the "Users" section selected under "User Management Settings". The main content area displays the "User Detail" screen for "Kol Mikaelson". The user's name is "Kol Mikaelson", alias is "kmika", email is "mugithidharani@gmail.com", and username is "sirisha@111gmail.com". The nickname is "User17405582722813922863". The role is "Worker", user license is "Salesforce Platform", profile is "worker profile", and active status is checked. Other options like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User are listed but unchecked. The "User Detail" screen also includes sections for "Permission Set Assignments", "Public Group Membership", "Queue Membership", "Team", "Managers in the Role Hierarchy", "OAuth Apps", "Third-Party Account Links", "Installed Mobile Apps", "Authentication Settings for External Systems", "Login History", and "User Provisioning Accounts".

We created 2-page layouts:

Page Layouts for Gold & Silver

The screenshot shows the Salesforce Setup interface for creating a page layout. The left sidebar has 'Page Layouts' selected. The main area displays a grid of fields for the 'Items' object, including Section, Created By, Item, Making Charges, Prices, Record Type, and Total Weight. There is also a 'Highlights Panel' and a 'Quick Actions in the Salesforce Classic' section.

The screenshot shows the Salesforce Setup interface for creating a page layout. The left sidebar has 'Page Layouts' selected. The main area displays a grid of fields for the 'Items' object, including Section, Created By, Item, Making Charges, Prices, Record Type, and Total Weight. An 'Information' section at the bottom contains sample data for various fields like Item Id, Purity, and Gold Price.

We created 3 Reports:

◆ Prices Report

◆ **Item with Billings Report**
 ◆ **Billing with Items & Customer order**

REPORT ▾
 Price report ▾ Prices

Fields

Groups

Outline ▾ Filters 1 Previewing a limited number of records. Run the report to see everything.

Columns

Price: Customer Price ▾ Price: Owner Name ▾ Gold Price ▾ Silver Price ▾

	Price: Customer Price	Price: Owner Name	Gold Price	Silver Price
1	Price-01	Kuruba Sirisha Team	₹80,000.00000	₹70,000.00000
2	Price-02	Kuruba Sirisha Team	₹80,000.00000	₹70,000.00000
			₹1,60,000.00000	₹1,40,000.00000

Update Preview Automatically

Type here to search 19:36 02-03-2025

REPORT: Billings with Item Report

Total Records: 3 Total Amount: ₹7,25,600.00 Total Total Amount: ₹9,12,160 Total KDM Charge: ₹1,12,560 Total Making Charges: ₹34,000.00 Total Stones/Other Price: ₹40,000.00 Total Stone Weight: 40.00

Item: Item Type	Billing: Billing Name	Item: Item Id	Amount	Ornament	Total Amount	KDM Charge	Making Charges	Stones/Other Price	Stone Weight
Gold (2)	Billing-01	Item-01	₹3,20,000.00	Necklace	₹3,77,000	₹32,000	₹15,000.00	₹10,000.00	10.00
	Billing-02	Item-02	₹4,00,000.00	Necklace	₹5,18,000	₹80,000	₹18,000.00	₹20,000.00	10.00
Subtotal			₹7,20,000.00		₹8,95,000	₹1,12,000	₹33,000.00	₹30,000.00	20.00
Silver (1)	Billing-05	Item-03	₹5,600.00	Necklace	₹17,160	₹560	₹1,000.00	₹10,000.00	20.00
	Subtotal		₹5,600.00		₹17,160	₹560	₹1,000.00	₹10,000.00	20.00
Total (3)			₹7,25,600.00		₹9,12,160	₹1,12,560	₹34,000.00	₹40,000.00	40.00

Row Counts Detail Rows Subtotals Grand Total

26°C Haze 11:05 ENG IN 28-02-2025

Report: Billings with Item
Billings with item and Customer order

Total Records 4

	Customer Billing: Customer Billing	Item: Customer Name
1	Billing-01	Anitha
2	Billing-02	Mikaelson
3	Billing-03	Dharani
4	Billing-04	Nazma

Dashboard: -

Recent

2 items

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Jewel Dashboard	Private Dashboards	Kuruba Sirisha Team	1/3/2025, 10:32 am		
Billings with item and Customer order	Private Dashboards	Kuruba Sirisha Team	1/3/2025, 6:58 am		

Jewelry Inventory S... Jewel Customers Items Orders Prices Billings Reports Dashboards

Dashboard Jewel Dashboard
Last refreshed 1 day ago. Refresh this dashboard to see the latest data.
As of 01-Mar-2025, 10:35 am: Viewing as Kuruba Sirisha Team

Billings with Item Report

Customer Billing: Customer Billing ↑	Item: Customer Name
Billing-01	Anitha
Billing-02	Mikaelson
Billing-03	Dharani
Billing-04	Nazma

Billings with item and Customer order

Customer Billing: Customer Billing ↑	Item: Customer Name
Billing-01	Anitha
Billing-02	Mikaelson
Billing-03	Dharani
Billing-04	Nazma

Prices Report

Sum of Gold Price

Price Customer Price	₹0	₹20k	₹40k	₹60k	₹80k
Price-01	80k				

Validation Rules: -

Created Validation Rules under Jewel Customer & Item

SETUP > OBJECT MANAGER

Jewel Customer

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

Validation Rules
2 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Jewel_Customer_object	Top of Page	Please fill Required fields	✓	Kuruba Sirisha Team, 26/02/2025, 10:38 am
Postal_Code	Zip/Postal code	Must contain 6 digits	✓	Kuruba Sirisha Team, 26/02/2025, 10:27 am

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

- Header:** The URL is <https://ssgsdegreecollege-8e-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01INS000002yl4X/ValidationRules/view>.
- Page Title:** Validation Rules (under Object Manager).
- Table Headers:** RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, MODIFIED BY.
- Table Data:** A single row for "Item" with "Top of Page" as the error location, "Please fill Required fields" as the message, an active status, and "Kuruba Sirisha Team, 26/02/2025, 7:43 pm" as the modifier.

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

- Header:** Shows the Windows taskbar with various pinned apps like WhatsApp, Microsoft Edge, and Google Chrome. The URL in the address bar is <https://ssgsdegreecollege-8e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS000002yl4X/ValidationRules/03dNS000002brLxYAI/view>.
- Page Header:** Includes a blue cloud icon, a search bar labeled "Search Setup", and a toolbar with icons for Home, Object Manager, and various system functions.
- Breadcrumbs:** "SETUP > OBJECT MANAGER"
- Section:** "Items" (highlighted in bold)
- Left Sidebar:** A vertical sidebar with links: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts.
- Main Content:** The "Items Validation Rule" page for the "Items" object. It displays the following details:
 - Validation Rule Detail:** Rule Name: Item, Active: ✓
 - Error Condition Formula:** OR(ISBLANK(Amount__c) , ISBLANK(Customer_Name__c) , ISBLANK(Gold_Price__c) , ISBLANK(KDM__c) , ISBLANK(Ornament__c) , ISBLANK(Percentage__c) , ISBLANK(Making_Charges__c) , ISBLANK(Prices__c) , ISBLANK(Stone_Weight__c) , ISBLANK(Silver_Price__c) , ISBLANK(Stone_Other_Price__c) , ISBLANK(Stone_Weight__c) , ISBLANK(Weight__c))
 - Error Message:** Please fill Required fields
 - Description:**
 - Created By:** Kuruba Sirisha Team, 26/02/2025, 10:52 am
 - Modified By:** Kuruba Sirisha Team, 26/02/2025, 7:43 pm
- Help:** "Help for this Page" with a question mark icon.

Screenshot of the Salesforce Object Manager showing the validation rule for the 'Jewel Customer' object.

Jewel Customer Validation Rule

Validation Rule Detail

- Rule Name:** Jewel_Customer_object
- Error Condition Formula:** OR(ISBLANK(City__c), ISBLANK(Country__c), ISBLANK(Phone__c), ISBLANK(State__c), ISBLANK(Street__c))
- Error Message:** Please fill Required fields
- Description:** (empty)
- Created By:** Kuruba Sirisha Team, 26/02/2025, 10:38 am
- Modified By:** Kuruba Sirisha Team, 26/02/2025, 10:38 am

Help for this Page

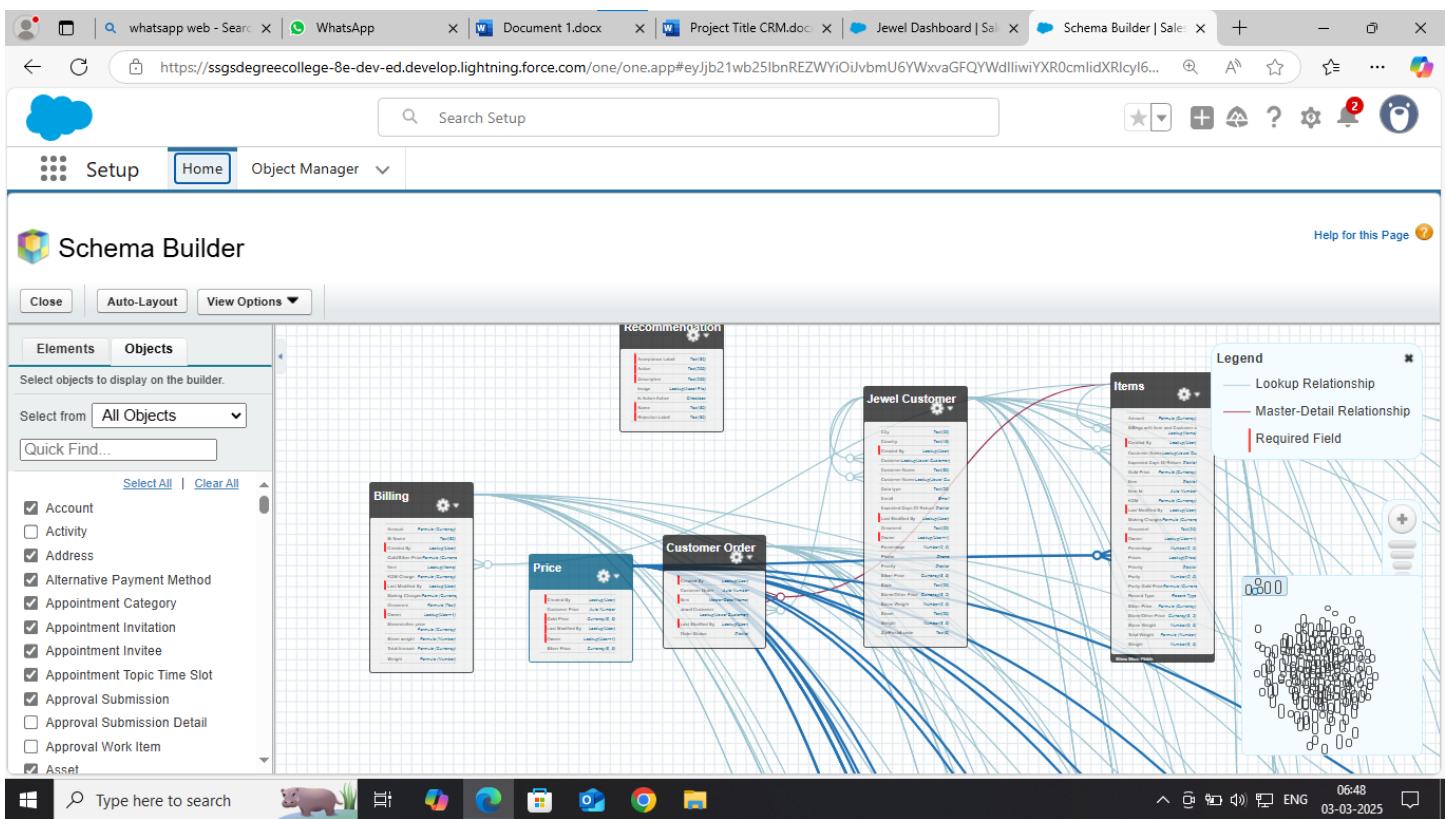
Object Manager Navigation:

- 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



Schema Builder: -

We created Schema Builders for Jewel Customer, Price, Item, Customer order & Billing.



Field Dependencies: -

We created Field Dependencies under Item objects

The screenshot shows the Salesforce Setup interface. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Buttons, Links, and Actions. The main content area is titled 'Items Field Dependencies' and contains a table with one row: 'Priority' (Controlling Field) and 'Expected Days Of Return' (Dependent Field). A note below the table states: 'This page allows you to define dependencies between fields (e.g., dependent picklists).'. A 'Help for this Page' link is in the top right.

The screenshot shows the 'Edit Field Dependency' dialog. It has sections for 'Instructions' (with a legend for 'Excluded Value' and 'Included Value') and two tables for 'Priority' and 'Expected Days Of Return'. The 'Priority' table has columns for Low, Medium, High, and Critical. The 'Expected Days Of Return' table has columns for 1-3 Days, 4-5 Days, 6-7 Days, 8-10 Days, 1-3 Days, 4-5 Days, 6-7 Days, and 8-10 Days. Buttons for Save, Cancel, and Preview are at the bottom of each table.

Tabs:-

We created **Tabs** for Jewel Customer, Prices, Items, Billing & Customer Order.

The screenshot shows the Salesforce Setup interface under the User Interface category, specifically the Tabs section. The title bar includes tabs for WhatsApp, Project Title CRM.docx, and Tabs | Salesforce. The main content area is titled "Custom Tabs" and contains three sections: "Custom Object Tabs", "Web Tabs", and "Visualforce Tabs". The "Custom Object Tabs" section lists several tabs with icons and labels: Billings (Computer), Item (Whistle), Jewel Customers (Heart), Orders (Star), and Prices (Train). A note at the top says, "You can create new custom tabs to extend Salesforce functionality or to build new application functionality." Below the tabs, there are sections for "Web Tabs" and "Visualforce Tabs", both of which currently have no defined tabs.

Flows:-

We created flows

The screenshot shows the Salesforce Flow Record list page. The title bar includes tabs for WhatsApp, Project Title CRM, Recently Viewed, Flows | Salesforce, Flow Trigger Expl., Email Notifications, and a New tab. The main content area is titled "Flows" and has a sub-section titled "Recently Viewed". It shows one item: "Email Notification Flow" (Record-Triggered After Save Flow) with status "Activated", last modified on 01/03/2025 at 11:32 am by KTeam. The page includes a search bar and various filter and action buttons.

The screenshot shows the 'Email Notification Flow' details page in the Salesforce interface. The flow is named 'Email Notification Flow' and is of type 'Record—Run After Save'. It is associated with the 'Jewelry Inventory S...' object. The progress status is 'Activated' with a green button. The last modified date is '01/03/2025, 11:32 am' by 'Kuruba Sirisha Team'. The page includes tabs for 'Related' and 'Details', and a section for 'Information' containing fields like Flow Label, API Name, Flow Type, and various dates and times.

(5) Testing & Validation:

User Interface Testing:

❖ Record Types:-

We Created Record types in item object and labeled as “Gold” and “Silver”.

The screenshot shows the 'Object Manager' page for the 'Item' object in the Salesforce setup. The 'Record Types' tab is selected. There are two record types listed: 'Gold' and 'Silver'. Both are active and were modified by 'Kuruba Sirisha Team' on 26/02/2025 at 2:06 pm and 2:09 pm respectively. The left sidebar shows other options like Details, Fields & Relationships, and Page Layouts.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	Kuruba Sirisha Team, 26/02/2025, 2:06 pm
Silver*	Silver items information	✓	Kuruba Sirisha Team, 26/02/2025, 2:09 pm

Screenshot of the Salesforce Setup > Object Manager page for the 'Items' object.

Record Type: Gold

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	Gold	Active	✓
Record Type Name	Gold		
Namespace Prefix			
Description	Gold items information		
Created By	Kuruba Sirisha Team, 26/02/2025, 2:06 pm	Modified By	Kuruba Sirisha Team, 26/02/2025, 2:06 pm

Picklists Available for Editing

Action	Field	Modified Date
Edit	Expected Days Of Return	26/02/2025, 2:06 pm
Edit	Item	26/02/2025, 2:06 pm
Edit	Priority	26/02/2025, 2:06 pm

Screenshot of the Salesforce Setup > Object Manager page for the 'Items' object.

Record Type: Silver

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	Kuruba Sirisha Team, 26/02/2025, 2:09 pm	Modified By	Kuruba Sirisha Team, 26/02/2025, 2:09 pm

Picklists Available for Editing

Action	Field	Modified Date
Edit	Expected Days Of Return	26/02/2025, 2:09 pm
Edit	Item	26/02/2025, 2:09 pm
Edit	Priority	26/02/2025, 2:09 pm

★ **Permission Sets:** -

We created permission sets and labeled as “Per to Worker” and selected object permissions for “Read, Edit, Create”.

The screenshot shows the Salesforce Setup interface under the 'Permission Sets' section. A permission set named 'Per to Worker' is selected. The 'Permission Set Overview' section displays basic information: Description (Per to Worker), License (Standard), Session Activation Required (unchecked), Permission Set Groups Added To (0), API Name (Per_to_Worker), Namespace Prefix (empty), Created By (Kuruba Sirisha Team, 26/02/2025, 5:56 pm), and Last Modified By (Kuruba Sirisha Team, 26/02/2025, 10:17 am). The 'Apps' section lists various permission categories: Assigned Apps, Assigned Connected Apps, Object Settings, App.Permissions, Apex Class Access, and Visualforce Page Access.

The screenshot shows the 'Items' tab for the 'Per to Worker' permission set. Under 'Tab Settings', the 'Available' checkbox is checked and the 'Visible' checkbox is checked. In the 'Items: Record Type Assignments' section, 'Gold' and 'Silver*' record types are assigned to the 'Assigned Record Types' column. Under 'Object Permissions', the 'Enabled' status is checked for Read, Create, Edit, and Delete permissions.

★ Profiles: -

We created 2 Profiles and given name as

- Gold Smith Profile

● Worker Profile

Profile Edit
Gold Smith

Set the permissions and page layouts for this profile.

Profile Edit

Profile Edit		Save		Save & New		Cancel		
Name	Gold Smith	User License	Salesforce	Description				
Custom Profile <input checked="" type="checkbox"/>								

Custom App Settings

Category	Visible	Default	Category	Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	My Service Journey (standard__MSJApp)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input type="checkbox"/>	<input type="radio"/>
Automation (standard__FlowApp)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Business Rules Engine (standard__ExpressionSetupConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>

Profile Edit
Gold Smith

Set the permissions and page layouts for this profile.

Profile Edit

Profile Edit		Save		Save & New		Cancel		
Name	Gold Smith	User License	Salesforce	Description				
Custom Profile <input checked="" type="checkbox"/>								

Custom App Settings

Category	Visible	Default	Category	Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	My Service Journey (standard__MSJApp)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input type="checkbox"/>	<input type="radio"/>
Automation (standard__FlowApp)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Business Rules Engine (standard__ExpressionSetupConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>

Basic Access

Basic Access		Read	Create	Edit	Delete	Data Administration		
		Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Billings	Billings	<input checked="" type="checkbox"/>						
	Billings with Item and Customer orders	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
	Billings	<input checked="" type="checkbox"/>						
	Orders	<input checked="" type="checkbox"/>						
Items	Items	<input checked="" type="checkbox"/>						
	Jewel Customers	<input checked="" type="checkbox"/>						
	Prices	<input checked="" type="checkbox"/>						
	prices	<input checked="" type="checkbox"/>						

Data Administration

Data Administration		Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
		Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Billings	Billings	<input checked="" type="checkbox"/>						
	Billings with Item and Customer orders	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
	Billings	<input checked="" type="checkbox"/>						
	Orders	<input checked="" type="checkbox"/>						
Items	Items	<input checked="" type="checkbox"/>						
	Jewel Customers	<input checked="" type="checkbox"/>						
	Prices	<input checked="" type="checkbox"/>						
	prices	<input checked="" type="checkbox"/>						

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in:	90 days
Enforce password history:	3 passwords remembered
Minimum password length:	8
Password complexity requirement:	Must include alpha and numeric characters
Password question requirement:	Cannot contain password
Maximum invalid login attempts:	10
Lockout effective period:	15 minutes
Obfuscate secret answer for password resets:	<input type="checkbox"/>
Require a minimum 1 day password lifetime:	<input type="checkbox"/>
Don't immediately expire links in forgot password emails:	<input type="checkbox"/>

Profile Edit

Name: worker profile

User License: Salesforce Platform

Description:

Custom Profile:

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input checked="" type="radio"/>
Jewelry Inventory System (Jewelry_Inventory_System)	<input type="checkbox"/>	<input checked="" type="radio"/>			

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations:

Standard Tab Settings

	Home	Default On	Accounts	Default On	Inventory Operations	Tab Hidden	Inventory Reservations	Tab Hidden	Invoices	Tab Hidden
All Sites			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						

Contact Point Address

Contact Point Consents

Contact Point Emails

Streaming Channels

User External Credentials

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration	View All Records	Modify All Records	View All Fields
Billings	<input checked="" type="checkbox"/>							
Billing with Item and Customer orders	<input checked="" type="checkbox"/>							
Billing	<input checked="" type="checkbox"/>							
Orders	<input checked="" type="checkbox"/>							
Items	<input checked="" type="checkbox"/>							
Jewel Customers	<input type="checkbox"/>							
Prices	<input checked="" type="checkbox"/>							
Price	<input checked="" type="checkbox"/>							

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets

★ Validation Rules: -

https://ssgsdegreecollege-8e-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01INS000002yl4X/ValidationRules/view

Cloud Search Setup Object Manager

SETUP > OBJECT MANAGER Items

Validation Rules

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Item	Top of Page	Please fill Required fields	✓	Kuruba Sirisha Team, 26/02/2025, 7:43 pm

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

https://ssgsdegreecollege-8e-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01INS000002yl4X/ValidationRules/03dNS000002brLx.../..

Type here to search 07:38 03-03-2025

Cloud Search Setup Object Manager

SETUP > OBJECT MANAGER Items

Items Validation Rule

Validation Rule Detail

Rule Name	Item	Active
Error Condition Formula	OR(ISBLANK(Amount__c), ISBLANK(Customer_Name__c), ISBLANK(Gold_Price__c), ISBLANK(KDM__c), ISBLANK(Ornament__c), ISBLANK(Percentage__c), ISBLANK(Making_Charges__c), ISBLANK(Prices__c), ISBLANK(Stone_Weight__c), ISBLANK(Silver_Price__c), ISBLANK(Stone_Other_Price__c), ISBLANK(Stone_Weight__c), ISBLANK(Weight__c))	✓
Error Message	Please fill Required fields	Error Location
Description		Top of Page
Created By	Kuruba Sirisha Team, 26/02/2025, 10:52 am	Modified By
		Kuruba Sirisha Team, 26/02/2025, 7:43 pm

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

Screenshot of the Salesforce Setup page for 'Items Validation Rule'.

Details

Validation Rule Edit

Rule Name: Save Save & New Cancel

Active:

Description:

Error Condition Formula

Example: More Examples... Functions: ABS ACOS ADDMONTHS AND ASCII ASIN Insert Field Insert Operator

Check Syntax

Help for this Page ⓘ Quick Tips Operators & Functions

I = Required Information

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

★ Flows: -

Screenshot of the Flow Builder interface for an 'Email Notification Flow - V1'.

Flow Details:

- Last saved on 1/3/2025, 11:32 am (Active)
- Run, Debug, View Tests, Save As New Version, Save, Deactivate

Toolbox:

- Interaction (3)
 - Action
 - Subflow
 - Custom Error
- Logic (6)
 - Assignment
 - Decision
 - Loop
 - Transform
 - Collection Sort
 - Collection Filter
- Data (4)
 - Create Records
 - Update Records
 - Get Records
 - Delete Records

Flow Diagram:

```

graph TD
    Start((Start)) -- "Record-Triggered Flow" --> Run[Run Immediately]
    Run --> Action[Action Notice]
  
```

Start: Record-Triggered Flow

Object: Billing

Trigger: A record is created

Optimize for: Actions and Related Records

Add Scheduled Paths (Optional)

Open Flow Trigger Explorer for Billing

Run Immediately

Action Notice

Get more on the AppExchange

The screenshot shows the Salesforce Flow Builder interface with the following details:

- Flow Details:** Action, Notice, API Name: Notice
- Configuration Fields:**
 - A_a Body (Included): EmailBody
 - A_a CC Recipient Address List (Not Included)
 - A_a Email Template ID (Not Included)
 - QD Log Email on Send (Not Included)
 - A_a Recipient Address Collection (Not Included)
 - A_a Recipient Address List (Included): Billing_c > Item > Customer Name > Email
- Buttons:** Cancel, Done

★ User Adoption: -

We created some jewel customers, items, billings, prices, customer orders in Jewelry Inventory System.

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

- User Details:**

Name	Niklaus Mikaelson	Role	Gold Smith
Alias	nmika	User License	Salesforce
Email	mugithidharani@gmail.com [Verify]	Profile	Gold Smith
Username	sirisha@123gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17405574621755108520	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+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
- Search Bar:** Search Setup
- Global Navigation:** Setup, Home, Object Manager
- Page Header:** WhatsApp, Project Title CRM.docx

S whatsapp web - Search | WhatsApp | Users | Salesforce | Project Title CRM.docx - Microsoft Word

https://ssgsdegreecollege-8e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005NS00000Ha66j%3Fnoredirect%3D1%2...

Cloud Search Setup Home Object Manager

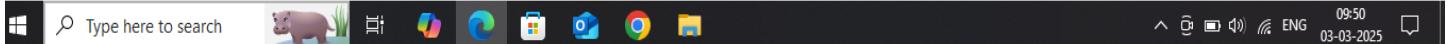
Q user adp No matching items found Didn't find what you're looking for? Try using Global Search.

SETUP Users User Kuruba Sirisha Team User Profile Help for this Page

Permission Set Assignments [1] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] | Team [0] | Managers in the Role Hierarchy [0] | OAuth Apps [1] | Third-Party Account Links [0] | Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [10+] | User Provisioning Accounts [0]

User Detail Edit Sharing Change Password View Summary

Name	Kuruba Sirisha Team	Role
Alias	KTeam	User License
Email	mugithidharani@gmail.com [Verified]	Profile
Username	jewel@kurubasirishateam.com	Active
Nickname	jewel	Marketing User
Title		Offline User
Company	SSGS degree college	Knowledge User
Department		Flow User
Division		Service Cloud User
Address	Koya nagar,near kasapuram road Guntakal 515801 AP INDIA	Site.com Contributor User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User
Locale	English (India)	WDC User



The screenshot shows a web browser window with multiple tabs open. The active tab is titled 'Permission Sets | Salesforce' and displays the 'Permission Sets' page. The page header includes a search bar labeled 'Search Setup' and a navigation bar with 'Setup', 'Home', and 'Object Manager'. A sidebar on the left contains a search bar with the query 'user adp' and a message stating 'No matching items found'. The main content area is titled 'Permission Set' and shows the 'Experience Profile Manager' permission set. It includes a 'Find Settings...' search bar and buttons for 'Clone', 'Edit Properties', 'Manage Assignments', and 'View Summary'. Below this, the 'Permission Set Overview' section provides details such as API Name (Experience_Profile_Manager), License (Salesforce), Namespace Prefix, Created By (Kuruba Sirisha Team, 20/02/2025, 10:28 am), and Last Modified By (Kuruba Sirisha Team, 28/02/2025, 10:17 am). The page also lists 'Apps' and their settings, including 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', 'Apex Class Access', and 'Visualforce Page Access'. The browser's address bar shows the URL: <https://ssgsdegreecollege-8e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPSNS00006WefW>.

(6) Conclusion: -

CRM is a tool that allows businesses to manage relationships with their customers effectively. Customer Relationship management is a business strategy that enables a business organization to maximize revenue, customer satisfaction, and profitability through strategic mobilization, organization, and management of customer's interests and desires. BWM has traversed

numerous business challenges that made it establish a CRM that will foster customer relationship as a baseline for market strengthening and diversification. BMW has diversified its market in various global markets through the initiation of the CRM systems. The system has significantly contributed to the company's financial, operational, managerial and development initiatives with a robust customer relationship that has fostered great sales of its product. Mercedes Benz operates a similar customer relationship management system just BMW and due to market power, the company has its customer roots to various market bases. Mercedes has majored in customer-dealership business relationships. This has provided the company with strategic mechanization of customer retention, satisfaction and purchase behavior enhancing the company's profitability through an increased purchase command. The two companies are among the leading CRM implementers in automotive.



CRM system is critical for jewelry businesses, allowing them to effectively manage customer relationships by centralizing data, enabling personalized interactions, optimizing sales processes, and gaining valuable insights into customer behavior, ultimately leading to increased sales, improved customer loyalty, and a more streamlined business operation through tailored marketing strategies and exceptional customer service.

A CRM (Customer Relationship Management) system for jewelers is essential for managing customer relationships, enhancing sales, and improving overall business efficiency.



Jewelry businesses face a multitude of challenges, from fierce competition to changing consumer preferences and limited budgets for marketing and advertising. It can be a tough market to navigate, but the good news is that implementing a customer relationship management (CRM) system can help overcome many of these challenges.

One of the biggest challenges facing jewelry businesses is the need to stay relevant and top of mind with customers. With so many options available, consumers are easily distracted and can quickly forget about your brand. A CRM system can help you stay top of mind by enabling you to communicate with

customers on a regular basis and provide personalized recommendations based on their preferences.

Another challenge is managing inventory and ensuring that you have the right products available at the right time. A CRM system can help you keep track of inventory levels and alert you when products are running low or need to be restocked. This can help you avoid lost sales due to out-of-stock items and ensure that you always have a variety of products available to meet customer demand.

Finally, jewelry businesses face the challenge of attracting new customers and retaining existing ones. A CRM system can help you identify customer segments and target them with personalized marketing messages that resonate with their specific interests and preferences.

