

TOPIC -:

CRM Application For Jewel Management

Presented by:-

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ABSTRACT

The CRM Application for Jewel Management is a robust, real-time Salesforce-based software solution designed to enhance inventory and sales management for jewellery stores and manufacturers. This system aims to improve operational efficiency by providing a streamlined approach to tracking, controlling, and recording jewellery items, while facilitating smooth sales transactions.

This project offers a comprehensive learning experience, covering essential Salesforce features and functionalities. Key learning areas include Data Modelling, where students will design the database schema and object relationships to represent jewellery inventory accurately. Participants will also gain experience in User Interface Customization, allowing the development of a tailored, user-friendly interface.

Advanced Salesforce features, such as Formula Fields, Validation Rules, Field Dependencies, and Record Types, will be utilized to automate and validate data inputs, ensuring the integrity of the inventory records. Cross-object formula fields and Conditional Formatting enhance data presentation, while Flows automate processes like order fulfilment and customer notifications. Additionally, students will implement Email Alerts and design Email Templates to improve communication with customers.

The system will provide insightful Reports and Dashboards to monitor sales trends, stock levels, and overall business performance, equipping stakeholders with actionable insights to drive decision-making. This project not only enhances technical skills but also provides a real-world understanding of inventory management in the jewellery industry through Salesforce.

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INTRODUCTION

Managing inventory and sales processes efficiently is crucial for jewellery stores and manufacturers due to the high value and variety of items involved. A robust CRM system tailored to jewellery management can streamline operations, ensure accurate tracking of inventory, and optimize sales workflows. The CRM Application for Jewel Management is designed as a real-time Salesforce project, offering an integrated solution for managing jewellery inventories, sales transactions, and customer interactions.

This project introduces students to the fundamentals of Salesforce development, focusing on creating an application that automates and simplifies inventory control. Participants will explore critical areas such as Data Modelling, where they will define how jewellery items, transactions, and customer data are represented within Salesforce. Furthermore, the project provides hands-on experience with User Interface Customization to ensure the application is intuitive and easy to use.

Learners will also delve into Object Relationships, Formula Fields, Validation Rules, and other essential Salesforce features to automate business processes, validate data entries, and generate real-time analytics. This system will not only enhance operational efficiency but also provide insights through Reports and Dashboards, empowering businesses to make data-driven decisions.

The project thus offers a comprehensive, practical approach to learning Salesforce, while addressing the unique needs of the jewellery industry.

OBJECTS

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.

Create Customer Details Object :

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

Enter the label name >> Customer Details

Plural label name >> Customer Details

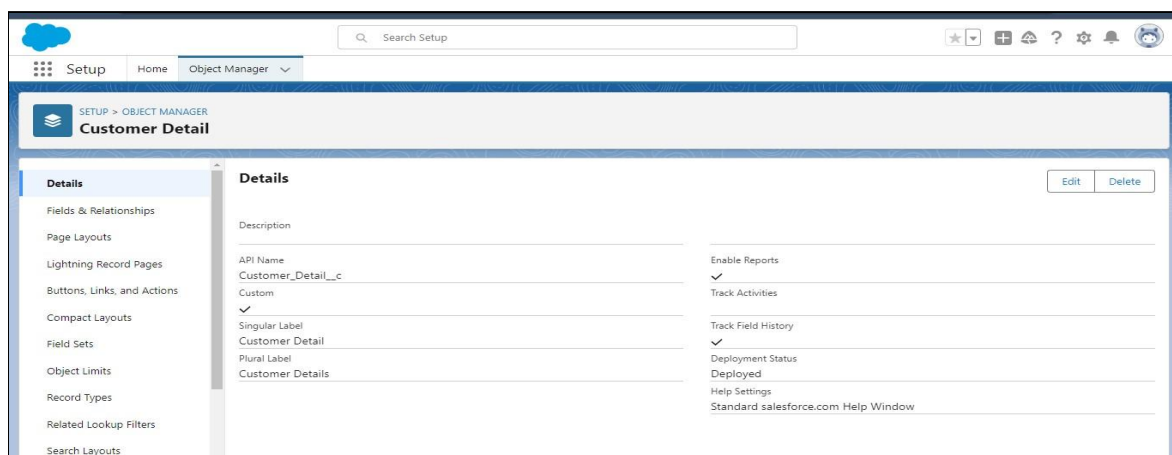
Enter Record Name Label and Format

Record Name >> Customer Name

Data Type >> Text

Click on Allow reports and Track Field History,

Allow search >> Save.



Create Jewel Customer Object:

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

Enter the label name >> Jewel Customer

Plural label name >> Jewel Customers

Enter Record Name Label and Format

Record Name >> Customer name

Data Type >> Text

Click on Allow reports.

Allow search >> Save.

The screenshot shows the Salesforce Setup interface for the 'Jewel Customer' object. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area is titled 'Jewel Customer' and contains a 'Details' section. The 'Details' section is divided into two columns. The left column lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, and Flow Triggers. The right column displays the configuration details for the 'Jewel Customer' object, including the API Name (Jewel_Customer__c), Custom checkbox, Singular Label (Jewel Customer), Plural Label (Jewel Customers), Enable Reports checkbox, Track Activities checkbox, Track Field History checkbox, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). There are 'Edit' and 'Delete' buttons in the top right corner of the details section.

Create Item Object:

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

Enter the label name >> Item

Plural label name >> Items

Enter Record Name Label and Format

Record Name >> Item Id

Data Type >> Auto Number

Display Format >> Item-{00}

Starting Number >> 1

Click on Allow reports.
Allow search >> Save.

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the 'Item' object is selected. The left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, and Flow Triggers. The 'Details' section is expanded, showing a list of settings. The 'Enable Reports' setting is checked, and the 'Allow search' setting is also checked. The 'Deployment Status' is 'Deployed', and the 'Help Settings' link is visible.

Setting	Value
Description	
API Name	Item__c
Custom	✓
Singular Label	Item
Plural Label	Items
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Create Customer Order Object:

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

Enter the label name >> Customer Order

Plural label name >> Customer Orders

Enter Record Name Label and Format

Record Name >> Customer Order

Data Type >> Auto Number

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
Restriction Rules
Scoping Rules
Triggers
Flow Triggers

Details

Description

API Name
Customer_Order__c

Custom ☒

Singular Label
Customer Order

Plural Label
Customer Orders

Enable Reports ☒

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

Display Format >> Item-{00}

Starting Number >> 1

Click on Allow reports.

Allow search >> Save.

Create Price Object:

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

Enter the label name >> Price

Plural label name >> Prices

Enter Record Name Label and Format

Record Name >> Item Id

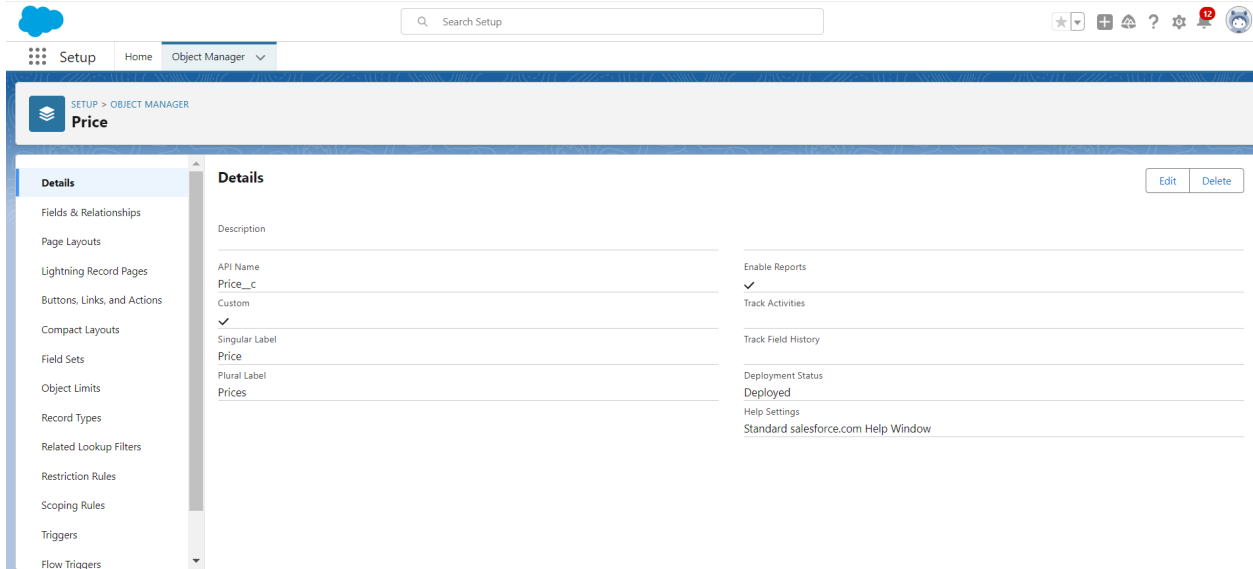
Data Type >> Auto Number

Display Format >> Item-{00}

Starting Number >> 1

Click on Allow reports.

Allow search >> Save.



Create Billing Object:

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

Enter the label name >> Billing

Plural label name >> Billings

Enter Record Name Label and Format

Record Name >> Item Id

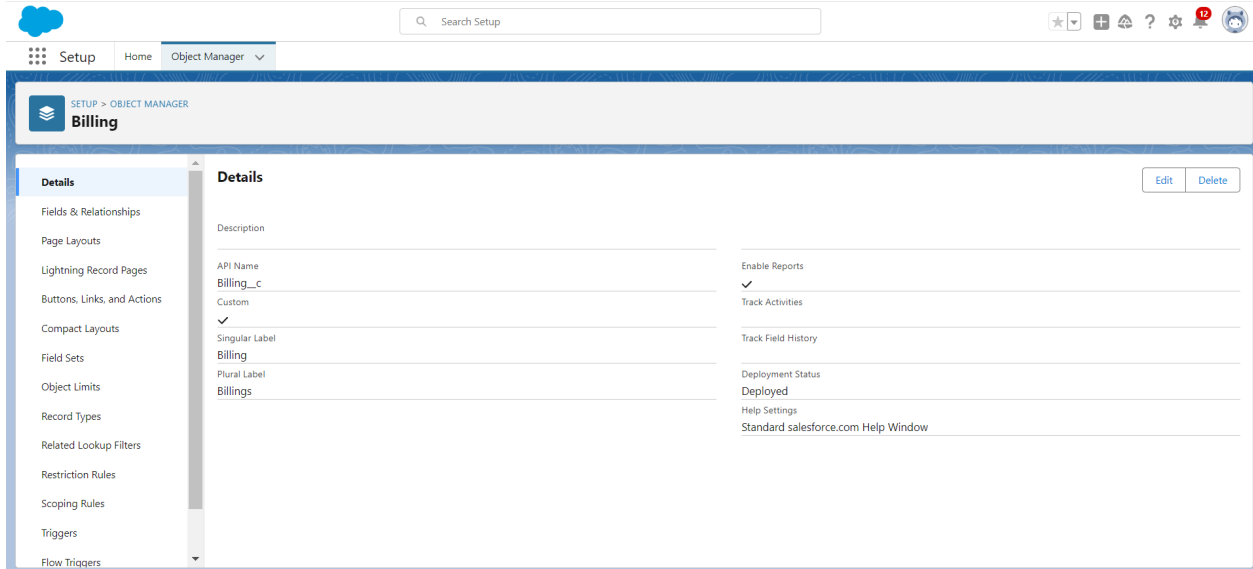
Data Type >> Auto Number

Display Format >> Item-{00}

Starting Number >> 1

Click on Allow reports.

Allow search >> Save.



TABS

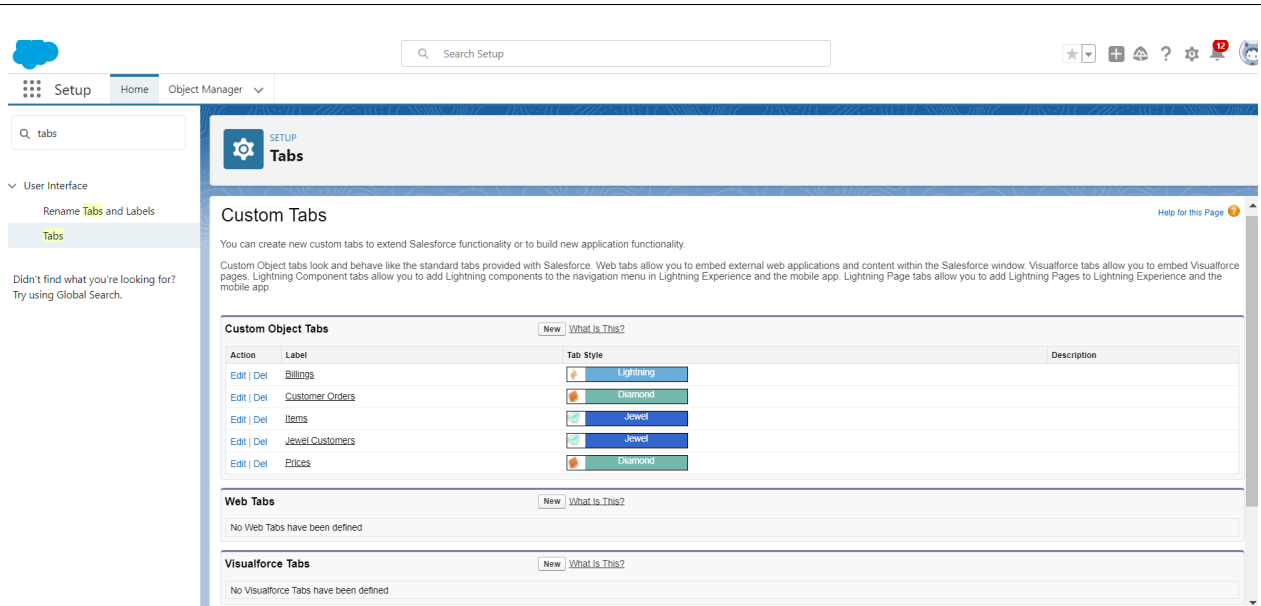
A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Creating a Custom Tab:

To create a Tab:(Customer)

Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)

Select Object(Jewel Customer) >> Select any tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) keep it as default >> Save.



Creating Remaining Tabs:

1. Now create tabs for Customer Order, Price, Billing objects.
2. Follow the same steps as mentioned above

THE LIGHTNING APP

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Create a Lightning App

To create a lightning app page:

Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.

Fill the app name in app details and branding as follow

App Name : Jewellery Inventory System.

Developer Name : This will auto populated

Description : Elevate your look with elegance

Image : optional (if you want to give any image you can otherwise not mandatory)
Primary color hex value : keep this default.
Then click Next >> (App option page)Set Navigation Style as Standard Navigation
>> Next.
(Utility Items) keep it as default >> Next.

To Add Navigation Items:

Search for the item in the (JewelCustomer,Item,CustomerOrder,Price,Billing,Reports,Dashboard) from the search bar and move it using the arrow button>>Next>>Next.

To Add User Profiles:

Search profiles (System administrator) in the search bar >> click on the arrow button
>> save & finish.

The screenshot shows the 'Navigation Items' configuration interface in the Lightning App Builder. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'Jewellery Inventory System'. The left sidebar lists 'App Settings' with sub-items: 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items' (selected), 'Navigation Rules', and 'User Profiles'. The main content area is titled 'Navigation Items' and contains the instruction: 'Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.'

The interface is divided into two main sections: 'Available Items' and 'Selected Items'. The 'Available Items' section has a search bar with the placeholder text 'Type to filter list...' and a list of items including Accounts, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations, Approval Requests, Asset Action Sources, Asset Actions, and Asset Action Providers. The 'Selected Items' section displays a list of items already added to the navigation: Jewel Customers, Items, Customer Orders, Prices, Billings, Reports, and Dashboards. Arrows between the two sections allow for moving items back and forth.

App Settings

App Details & Branding

- App Options
- Utility Items (Desktop Only)
- Navigation Items
- Navigation Rules
- User Profiles

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

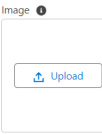
App Details

* App Name ⓘ
Jewellery Inventory System

* Developer Name ⓘ
Jewellery_Inventory_System

Description ⓘ
Elevate your look with elegance

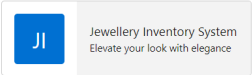
App Branding



Primary Color Hex Value ⓘ
#0070D2

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview



App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)
- Navigation Items
- Navigation Rules
- User Profiles

User Profiles

Choose the user profiles that can access this app.

Available Profiles

🔍 Type to filter list...

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website
- Authenticated Website
- B2B Reordering Portal Buyer Profile
- Contract Manager
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile
- Customer Community Login User
- Customer Community Plus Login User



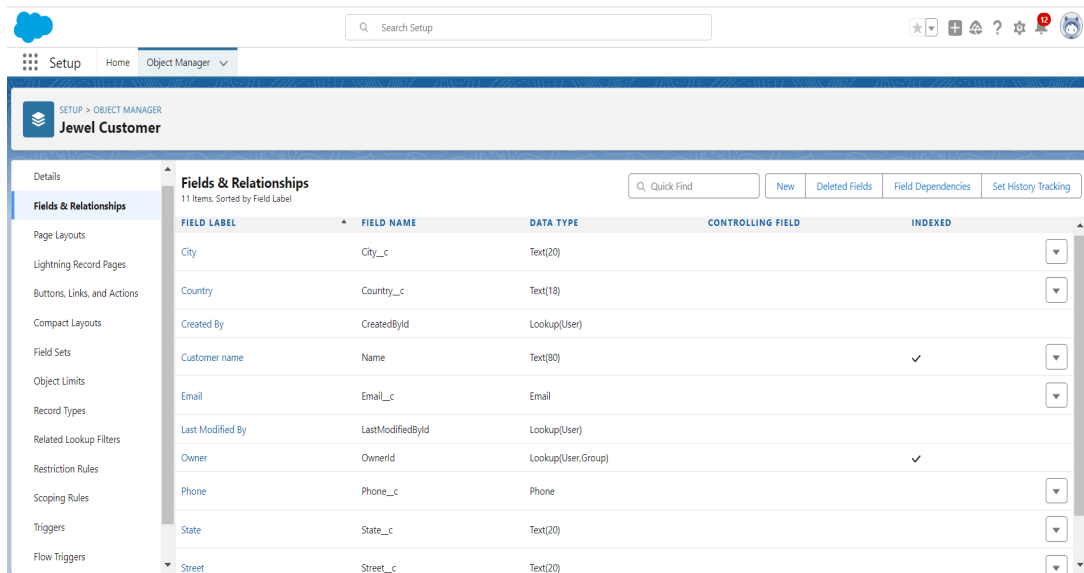
Selected Profiles

- System Administrator
- Gold Smith

FIELDS

Creation of Lookup Relationship Field on Volunteer Object :

1. Go to setup >> click on Object Manager >> type object name(Volunteer) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Master Detail relationship
4. Select the related object “Drop-Off point” and click next.
5. Field Name : Drop_Off_point
6. Field label : Auto generated
7. Next >> Next >> Save.



The screenshot shows the Salesforce Object Manager interface for the 'Jewel Customer' object. The 'Fields & Relationships' section is active, displaying a table of 11 fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: City (Text(20)), Country (Text(18)), Created By (Lookup(User)), Customer name (Text(80)), Email (Email), Last Modified By (Lookup(User)), Owner (Lookup(User,Group)), Phone (Phone), State (Text(20)), and Street (Text(20)).

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



Search Setup



Setup

Home

Object Manager



Setup > OBJECT MANAGER

Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Fields & Relationships

23 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Customer Name	Customer_Name__c	Lookup(Jewel Customer)		✓
Expected Days Of Return	Expected_Days_Of_Return__c	Picklist	Priority	
Gold Price	Gold_Price__c	Formula (Currency)		
Item Id	Name	Auto Number		✓
Item Type	Item_Type__c	Picklist		
KDM	KDM__c	Formula (Currency)		
Last Modified By	LastModifiedById	Lookup(User)		



Search Setup



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

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Fields & Relationships

6 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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



Search Setup



Setup Home 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

Restriction Rules

Scoping Rules

Triggers

Fields & Relationships

6 Items. Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Gold Price	Gold_Price__c	Currency(8, 5)		
Item Id	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Silver Price	Silver_Price__c	Currency(8, 5)		



Search Setup



Setup Home 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

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Fields & Relationships

14 Items. Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Gold/Silver Price	Gold_Silver_Price__c	Formula (Currency)		
Item	Item__c	Lookup(Item)		✓
Item Id	Name	Auto Number		✓
KDM Charge	KDM_Charge__c	Formula (Currency)		
Last Modified By	LastModifiedById	Lookup(User)		
Making Charges	Making_Charges__c	Formula (Currency)		
Ornament	Ornament__c	Formula (Text)		

PROFILES

To create a Gold Smith profile:

Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (System Administrator) >> enter profile name (Gold Smith) >> Save.

While still on the profile page, then click Edit.

Scroll down to Custom Object Permissions and Give access permissions for Jewel Customer,Item,Custom Order,Prices,Billings .

Scroll down and Click on Save.

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Profiles' and shows the details for the 'Gold Smith' profile. The profile is a 'Custom Profile' created by 'NEELAKSHI SINGH' on '22/09/2024, 9:50 pm'. It is modified by 'NEELAKSHI SINGH' on '23/09/2024, 1:36 am'. The 'Page Layouts' section shows various layouts assigned to the profile, including 'Global Layout', 'Email Application', 'Home Page Layout', 'Account Layout', 'Alternative Payment Method Layout', 'Appointment Invitation Layout', 'Location Group Assignment Layout', 'Macro Layout', 'Object Milestone Layout', 'Operating Hours Layout', 'Opportunity Layout', and 'Opportunity Product Layout'. The 'Custom Object Permissions' section is partially visible at the bottom.

To create a worker profile:

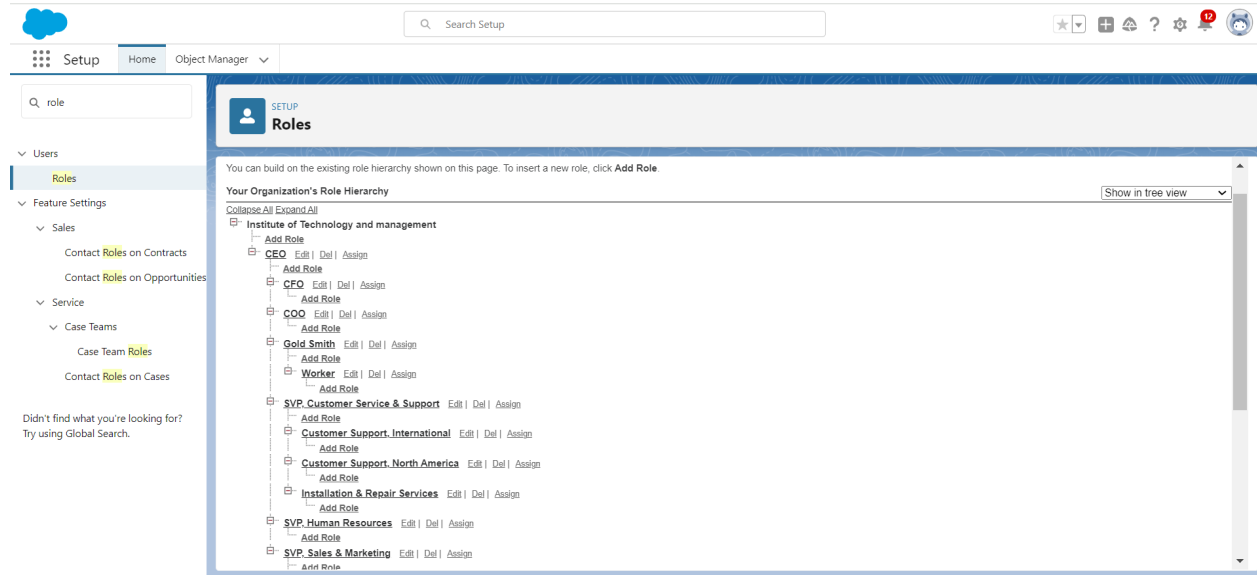
1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Salesforce Platform User) >> enter profile name as worker profile>> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Items,Price and Customer Order objects.
4. Scroll down and Click on Save.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'Pro' entered. Below it, there's a 'Hyperforce Assistant' section and a list of categories: Users, Profiles (selected), Data, Feature Settings, Functions, Marketing, Lead Processes, Sales, and Products. The main content area is titled 'Profiles' and shows the details for the 'worker' profile. It includes a list of permissions (Login IP Ranges, Apex Class Access, Visualforce Page Access, External Data Source Access, Named Credential Access, External Credential Principal Access, Custom Metadata Type Access, Custom Setting/Definition Access, Flow Access, Service Presence Status Access, Custom Permissions) and a 'Page Layouts' section. The 'Page Layouts' section is divided into 'Standard Object Layouts' and 'Custom Profile' (checked). The 'Standard Object Layouts' table lists various objects and their assigned layouts, such as Global Layout, Lead Layout, Location Layout, Account Layout, and Appointment Invitation Layout.

ROLES

Creating Gold Smith Role:

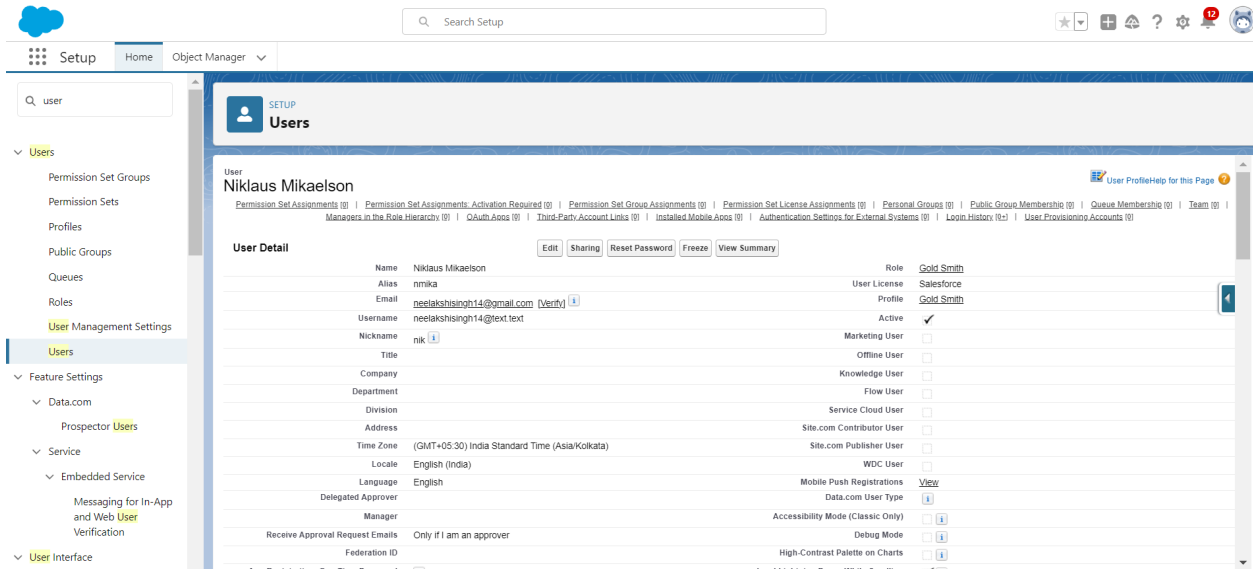
1. From setup >> Go to quick find >> Search for Roles >> click on set up roles..
2. Click on Expand All and click on add role under whom this role works.
3. Give Label as “Gold Smith” and Role name gets auto populated. Check to whom this role (Gold Smith) reports. Then click on Save.
4. Create one more role as Worker which reports to Gold Smith.



CREATION OF USERS

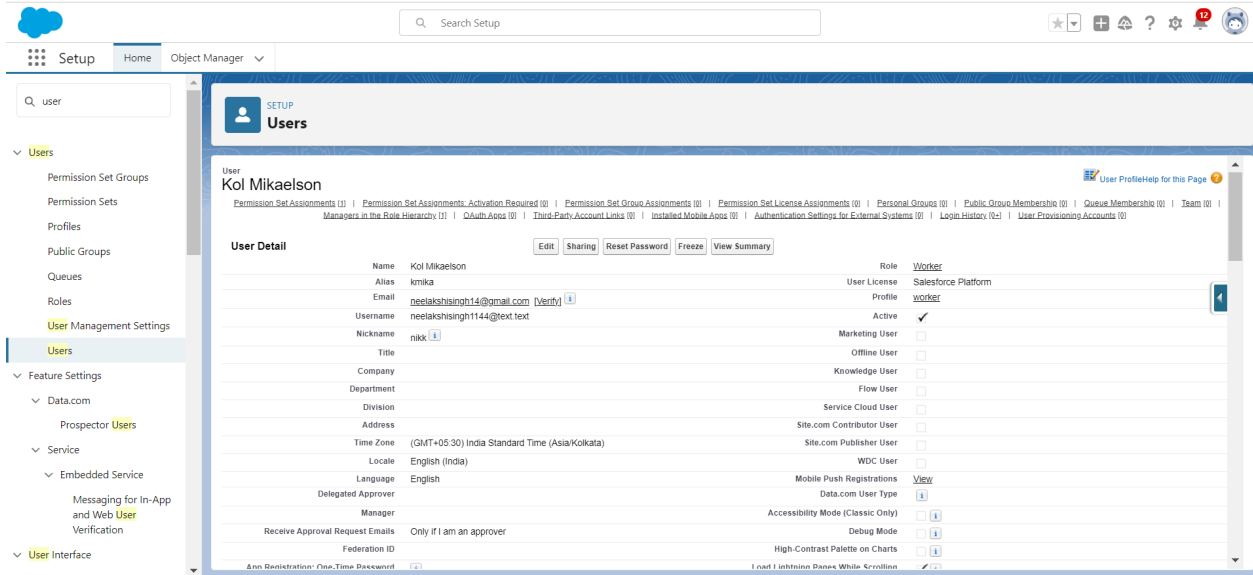
creation of first user:

1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
 1. First Name : Niklaus
 2. Last Name : Mikaelson
 3. Alias : Give a Alias Name
 4. Email id : Give your Personal Email id
 5. Username : Username should be in this form: text@text.text
 6. Nick Name : Give a Nickname
 7. Role : Gold Smith
 8. User licence : Salesforce
 9. Profiles : Gold Smith
3. Save



creation of second user:

1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
 - First Name : Kol
 - Last Name : Mikaelson
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: text@text.text
 - Nick Name : Give a Nickname
 - Role : Worker
 - User licence : Salesforce Platform
 - Profiles : Worker
3. Save.



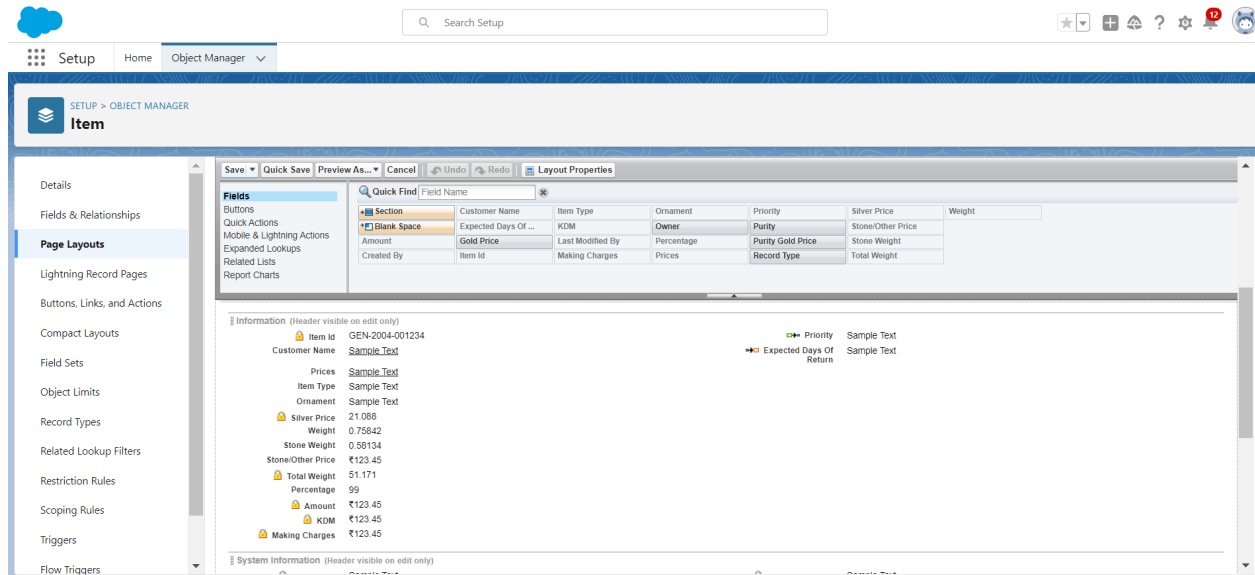
Page Layouts

Creating layout:

1. Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.
2. Click on Page layout >> Click on New.
3. Give Page layout Name as “Page Layout for Gold” and click on Save.
4. Arrange the field as shown in the Information Section ,remove fields which are related to Silver and click Ok.
5. Click Save.
6. Make sure your page layout looks like the picture above.

and

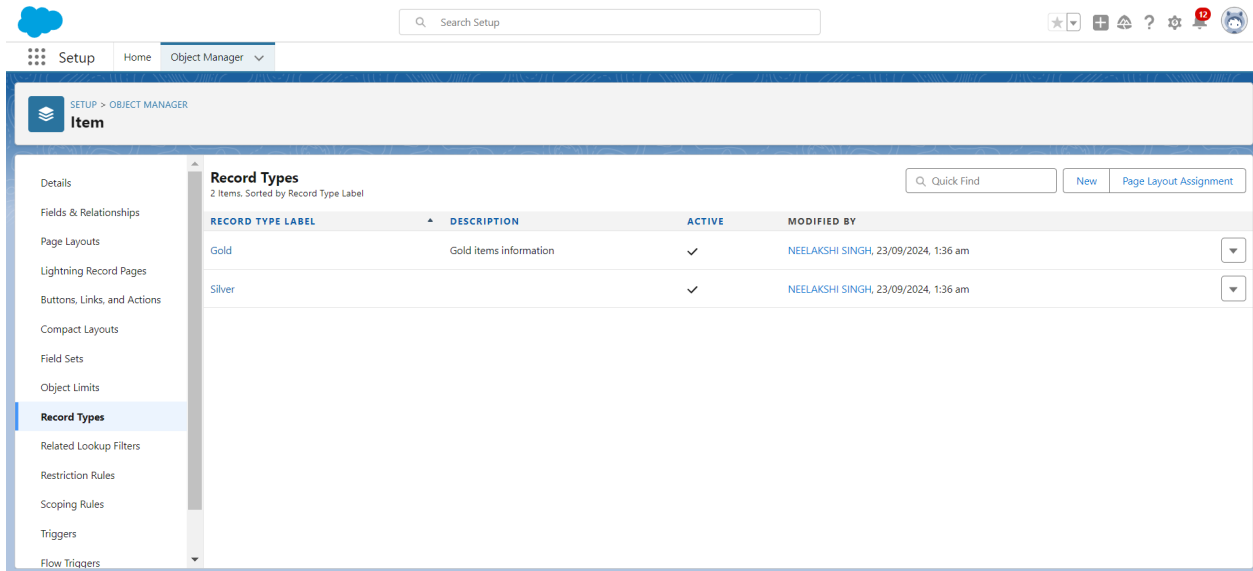
1. Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.
2. Click on Page layout >> Click on New.
3. Give Page layout Name as “Page Layout for Silver” and click on Save.
4. Arrange the field as shown in the Information Section ,remove fields which are related to Gold and click Ok.



RECORD TYPES

creating a record:

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar >> click on the object.
2. Click on the Record Types >> click New.
3. Select Existing Record as “Master”, Record type Label as “Gold”, Description as “Gold items information”.
4. Uncheck for “Make Available”.
5. Scroll down and check for the Gold Smith, Worker & System Administrator profile and click on Next.
6. Select “Apply a different layout for each profile”, and change page layout to “Page Layout for Gold” for Gold Smith, Worker and System Administrator >> save & new.

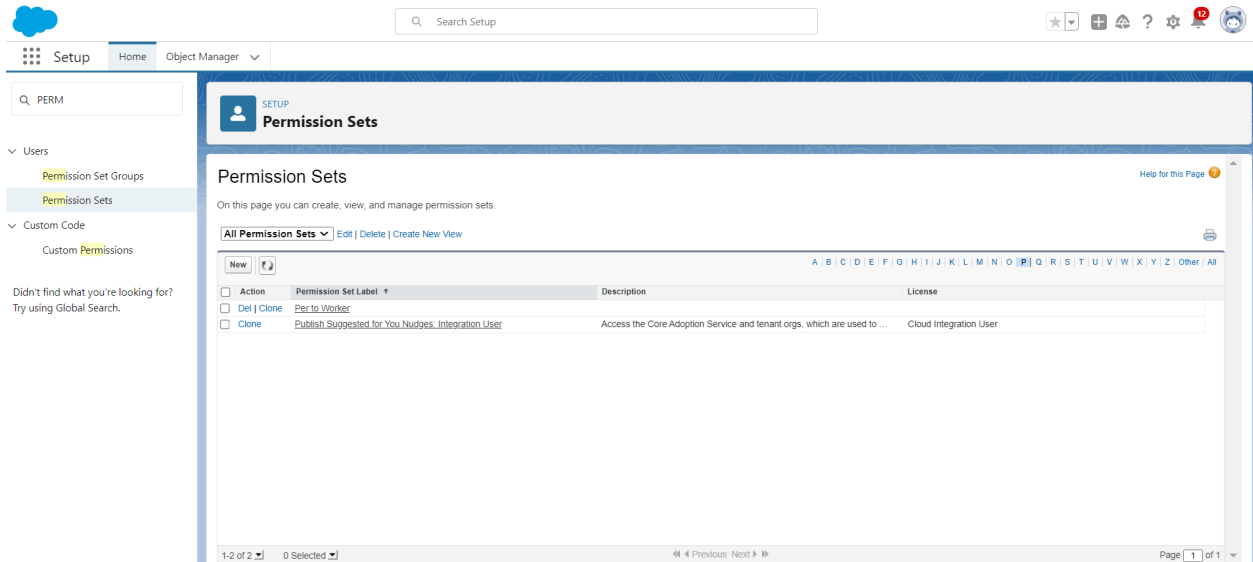


PERMISSION SETS

Creating Permission Set:

Go to setup >> type “permission sets” in quick search >> select permission sets >> New.

1. Enter the label name as “Per to Worker”, API will be auto populated >> save.
2. Under Apps Select object settings.
3. Click on Items object >> click on Edit >> under Item:Record Type Assignments,enable Gold,Silver >> Object permission check for read ,edit and create.
4. Click on Save.
5. After saving the permission click on the Manage assignment
6. Now click on the Add Assignment.
7. Now select the users which you have created in user milestone, using Worker profile and click on Next >> Assign >> Done.



USER ADOPTION

Create A Record (Jewel Customer):

1. Click on App Launcher on the left side of the screen.
2. Search Jewelry Inventory System & click on it.
3. Click on Drop Down and Click on the Jewel Customer tab.
4. Click New
5. Fill the details and click on save.

View A Record(Jewel Customer):

1. Click on App Launcher on the left side of the screen.
2. Search Jewelry Inventory System & click on it.
3. Click on the Jewel Customer Tab.
4. Click on any record name. you can see the details of the Jewel Customer.

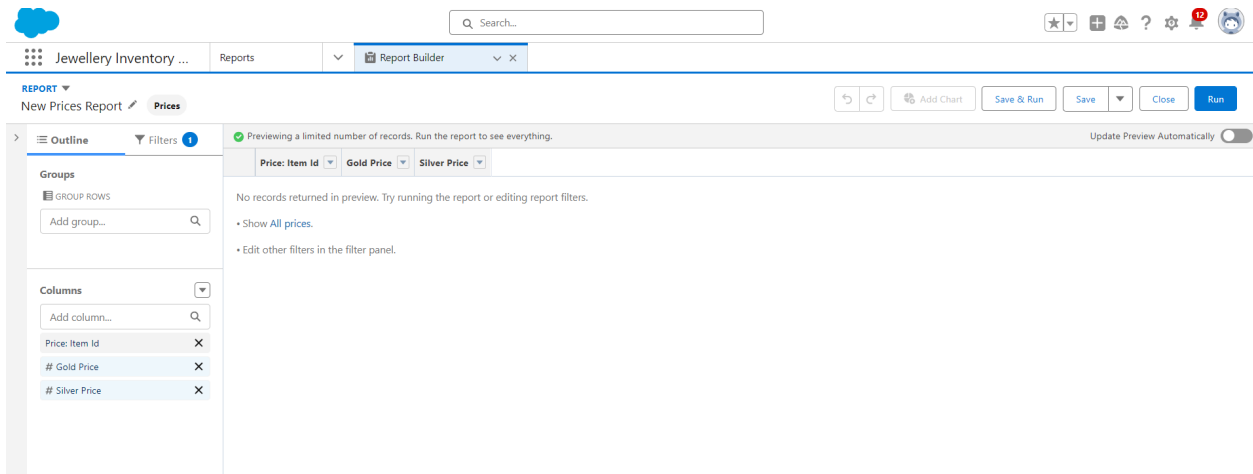
Delete A Record(Jewel Customer):

1. Click on App Launcher on the left side of the screen.
2. Search Jewelry Inventory System & click on it.
3. Click on the Jewel Customer Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete.

REPORTS

Creation of Report:

1. Go to the app >> click on the reports tab.
2. Click New Report.
3. Select report type from category or from report type panel or from search panel ? click on start report
4. Customise your report
5. Add fields from the left pane as shown below.
6. Save or run it.
7. Create a report with report type: “Item with Billings”.
8. Create a report with report type: “Billings with item and Customer order”.

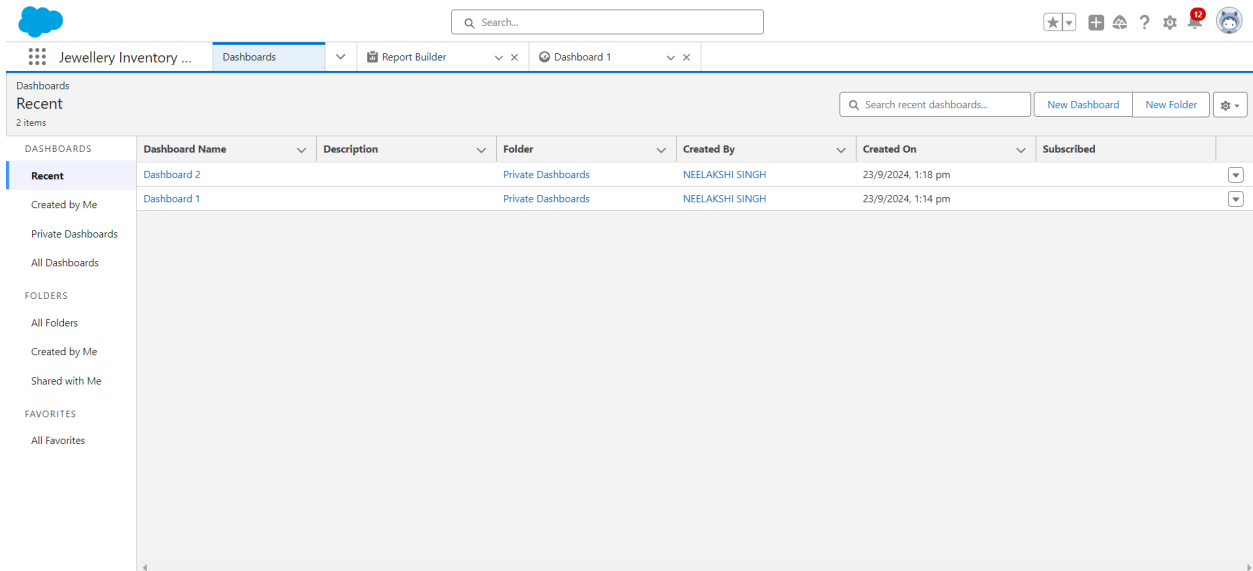


DASHBOARDS

Creating Dashboards:

Go to the app>>click on the Dashboards tabs.

1. Give a Name and click on Create.
2. Select add component.
3. Select a Report and click on select.
4. Click Add then click on Save and then click on Done.
5. create another dashboard



FLOWS

Creation of Flow:

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.
2. Select the Record-triggered flow and Click on Create.
3. Select the Object as a “Billing” in the Drop down list.
4. Select the Trigger Flow when: “A record is Created or Updated”.
5. Select the Optimize the flow for: “Actions and Related Records” and Click on Done.
6. Now change the mode form Auto-layout to free-form.
7. Now select the manger option in the toolbox, click New resource.
8. Select the resource type as text template.
9. Enter the API name as “ Email body”.
10. Change the view as Rich Text>>View to Plain Text.
11. In the body field paste the syntax that is given below.
 1. Hello
 2. Customer Name: {!\$Record.Item__r.Customer_Name__r.Name}
 3. Here are the details for the item you purchased with Jewelry Inventory System
 4. Item Type: {!\$Record.Item__r.Item_Type__c}
 5. Ornament: {!\$Record.Ornament__c}
 6. Weight: {!\$Record.Weight__c} grams
 7. Amount: {!\$Record.Amount__c}

12. Click done.
13. Now click on elements, and drag the action element into the preview pane.
14. Their action bar will be opened in that search for “ send email ” and click on it.
15. Give the label name as “ notice”
16. API name will be auto populated.
17. Enable the body in set input values for the selected action.
18. Select the text template that was created.
19. Include Recipient Address list, select the email form the record.
 1. ({!\$Record.Item_r.Customer_Namer.Email_c})
20. Include the subject as “Welcome to Jewelry Inventory System ”.
21. Click done.
22. Now drag the path from the start to the action element.
23. Click on save. Given the Flow label , Flow Api name will be auto populated.
24. And click save, and click on activate.

The screenshot displays the Salesforce Flow Builder interface. The top navigation bar shows 'Flow Builder' and 'flows - V2'. Below the navigation bar, there are tabs for 'Free-Form', 'Version 2: Last modified 13 hours ago', 'Active', 'Run', 'Debug', 'View Tests', 'Deactivate', 'Save As', and 'Save'. The left sidebar contains a 'Toolbox' with 'Elements' and 'Manager' tabs. Under 'Elements', there are categories: 'Interaction (3)' (Action, Subflow, Custom Error), 'Logic (6)' (Assignment, Decision, Loop, Transform, Collection Sort, Collection Filter), and 'Data (4)' (Create Records, Update Records, Get Records, Delete Records). The main canvas shows a 'Start' event labeled 'Record-Triggered Flow' with details: 'Object: Billing', 'Trigger: A record is created or updated', and 'Optimize for: Actions and Related Records'. Below the start event, there is an 'Action' element labeled 'notice' with a 'Run Immediately' button. At the bottom, there is a link to 'Get more on the AppExchange' and a URL 'lightning.force.com/.../home'.

CONCLUSION

The CRM Application for Jewel Management demonstrates the powerful capabilities of Salesforce in streamlining jewellery inventory and sales processes. Through this project, students acquire practical skills in developing and customizing Salesforce applications, with a strong focus on real-time data management and user-centric design.

By mastering core concepts such as Data Modelling, UI Customization, and Object Relationships, students are equipped to build scalable solutions for inventory control. Additionally, the use of advanced features like Formula Fields, Validation Rules, and Flows ensures efficient automation and data accuracy, vital for the operational success of a jewellery business.

The system's ability to generate comprehensive Reports and Dashboards offers stakeholders valuable insights into inventory levels, sales performance, and market trends, facilitating informed decision-making. This project not only enhances students' technical Salesforce expertise but also deepens their understanding of managing real-world business operations, particularly within the jewellery sector.

In conclusion, this project equips learners with the necessary tools to develop and deploy a CRM system tailored to the jewellery industry, fostering both technical growth and practical business acumen.