TOPIC -:

CRM Application For Jewel Management

Presented by:-
Neelakshi singh

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.

INDEX:

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 DetailsObject :

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

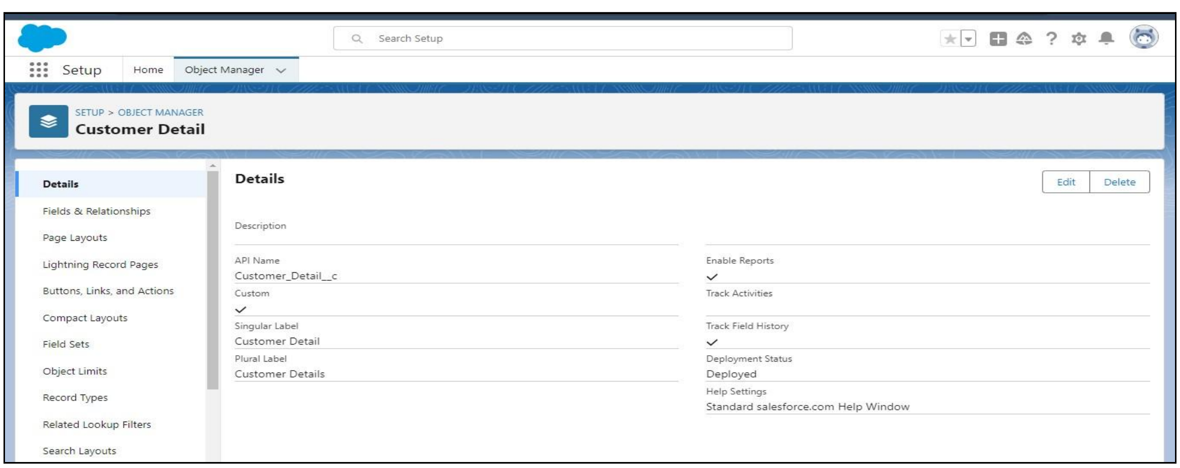
Enter Record Name Label and Format

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

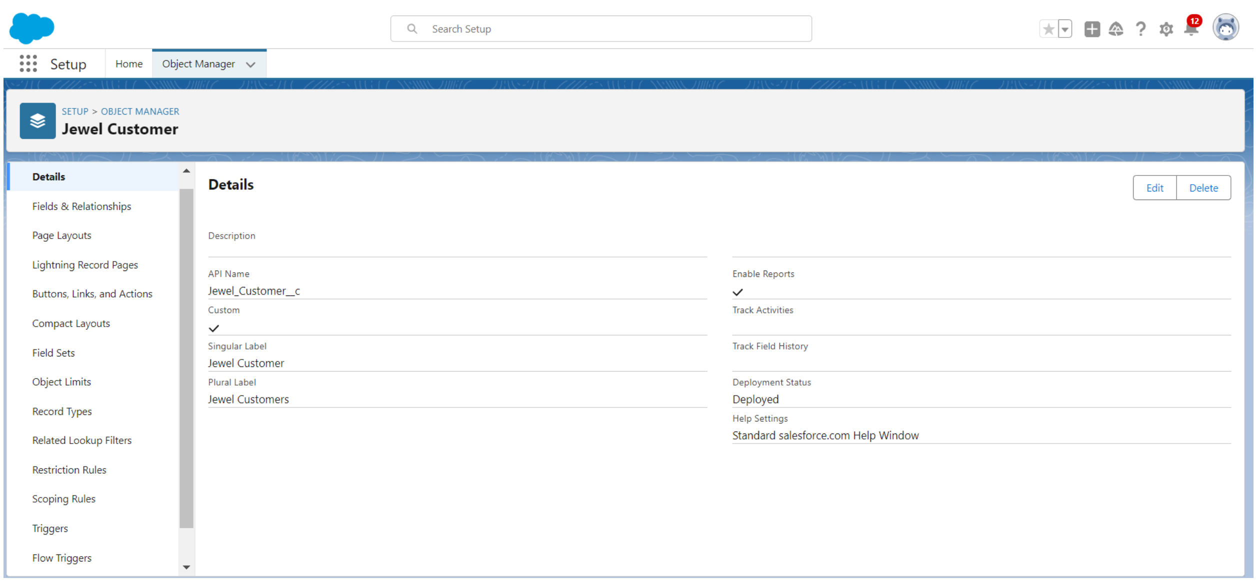
Enter Record Name Label and Format

Record Name >> Customer name

Data Type >> Text

Click on Allow reports.

Allow search >> Save.



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

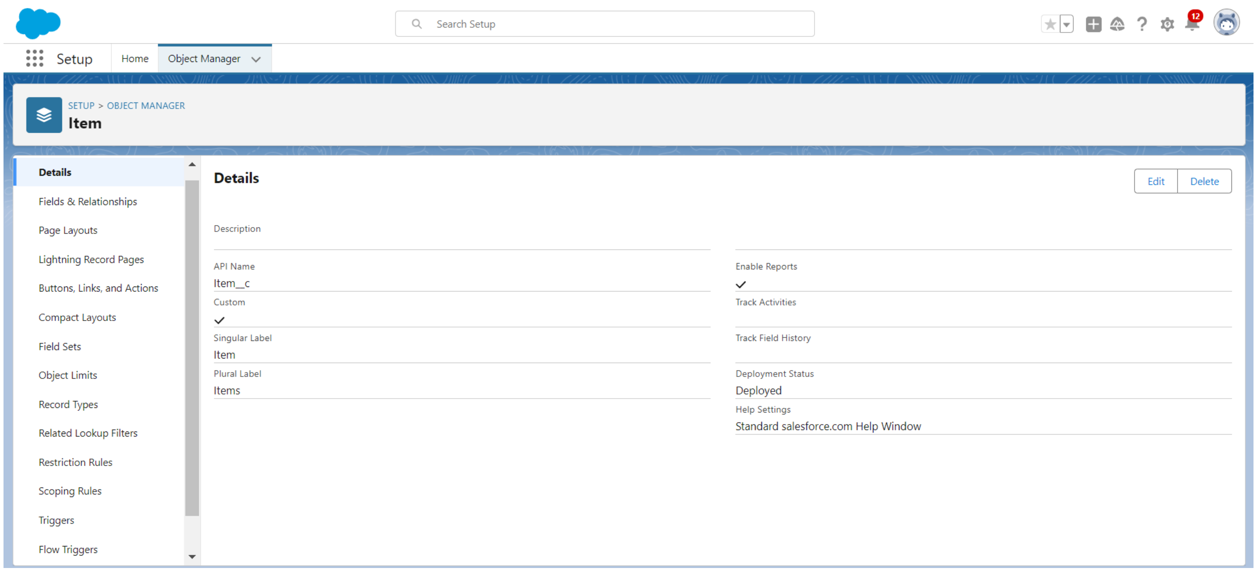
Record Name >> Item Id

Data Type >> Auto Number

Display Format >> Item-{00}

Starting Number >> 1

Click on Allow reports.
Allow search >> Save.



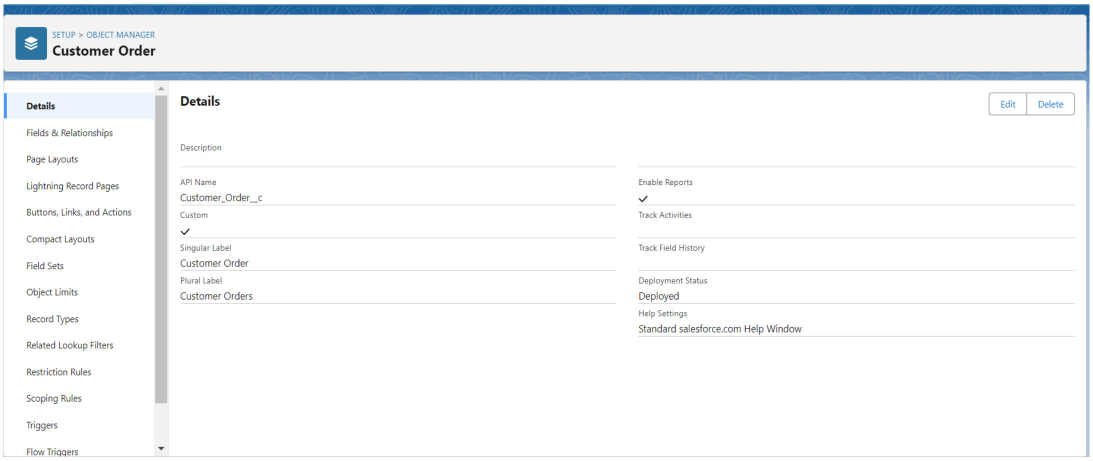
Create Customer Order Object:

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



Display Format >> Item-{00}
Starting Number >> 1
Click on Allow reports.
Allow search >> Save.

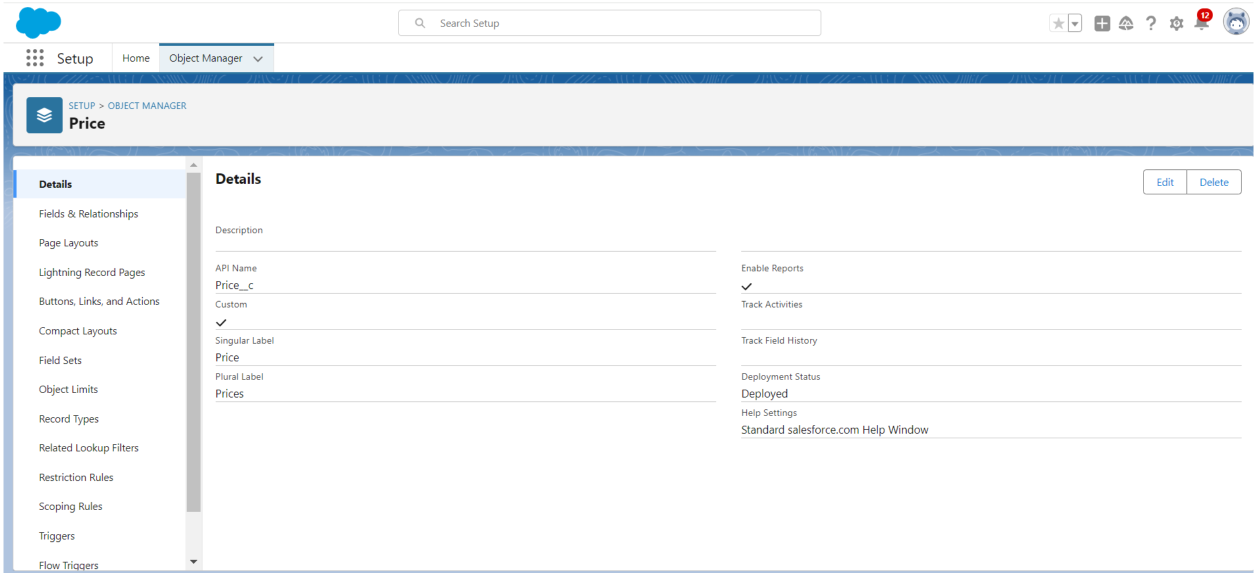
Create Price Object:

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

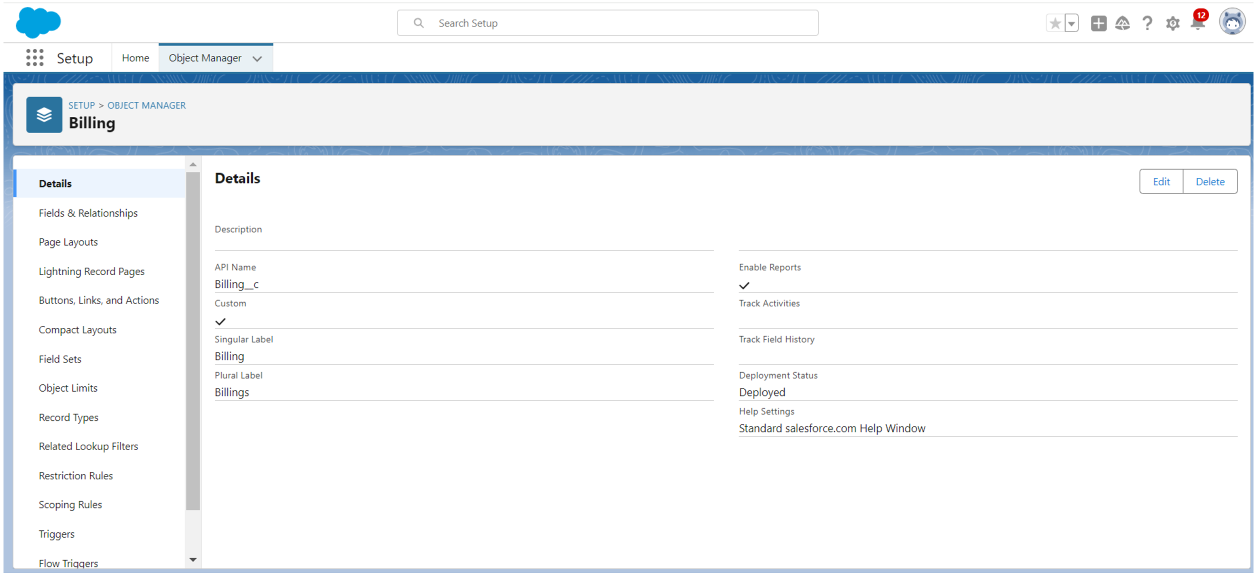
Data Type >> Auto Number

Display Format >> Item-{00}

Starting Number >> 1

Click on Allow reports.

Allow search >> Save.



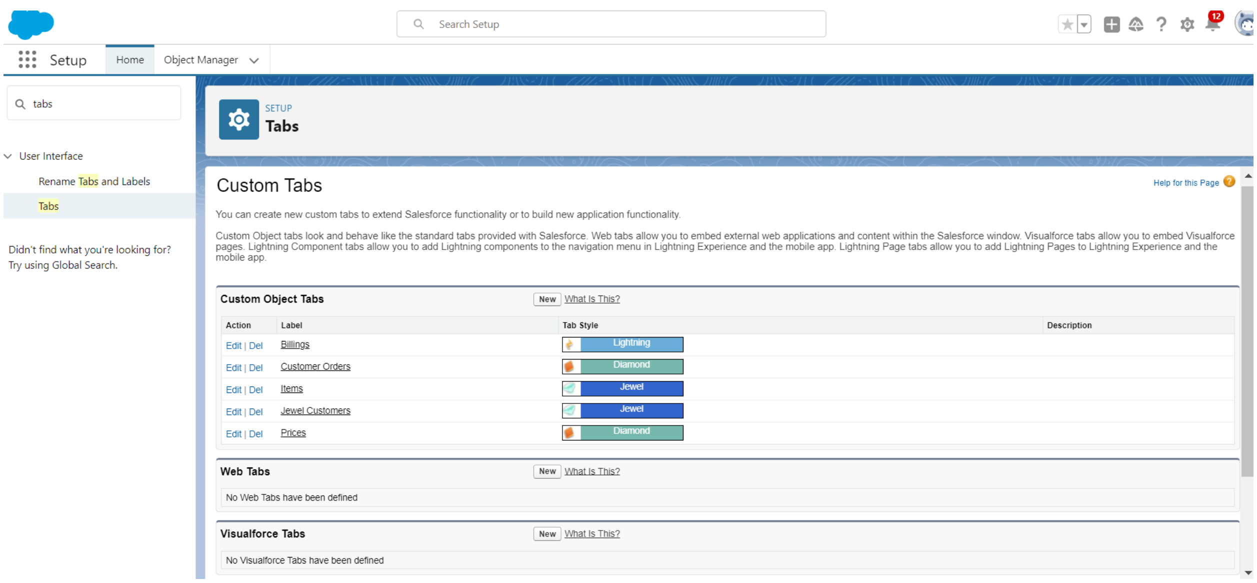
TABS

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:

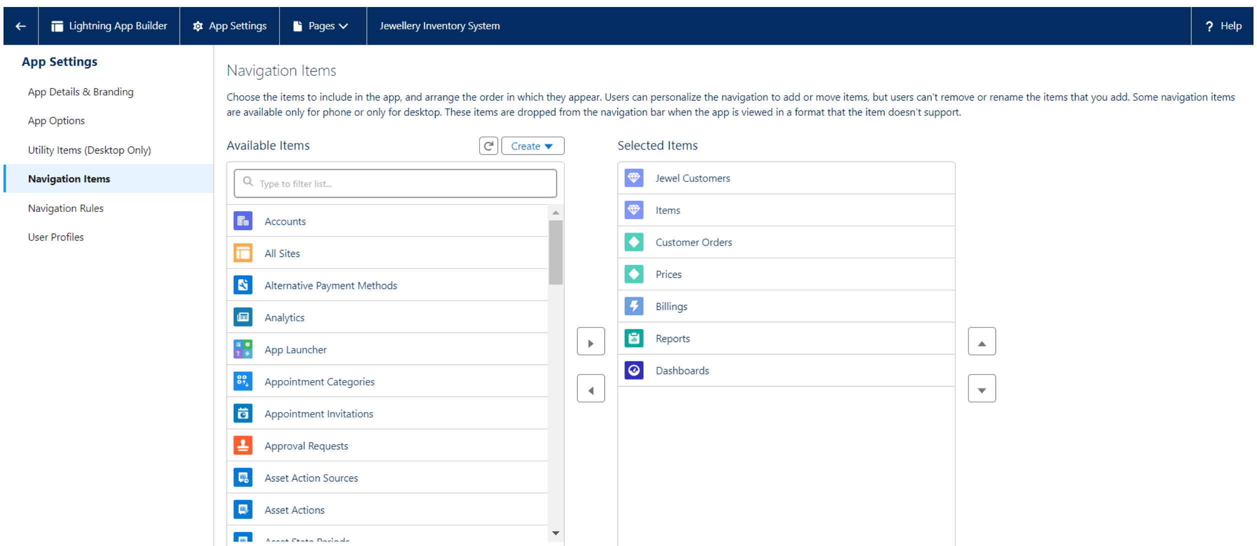
Go to setup page >> search "app manager" in quick find >> select "app manager" >> click on New lightning App.

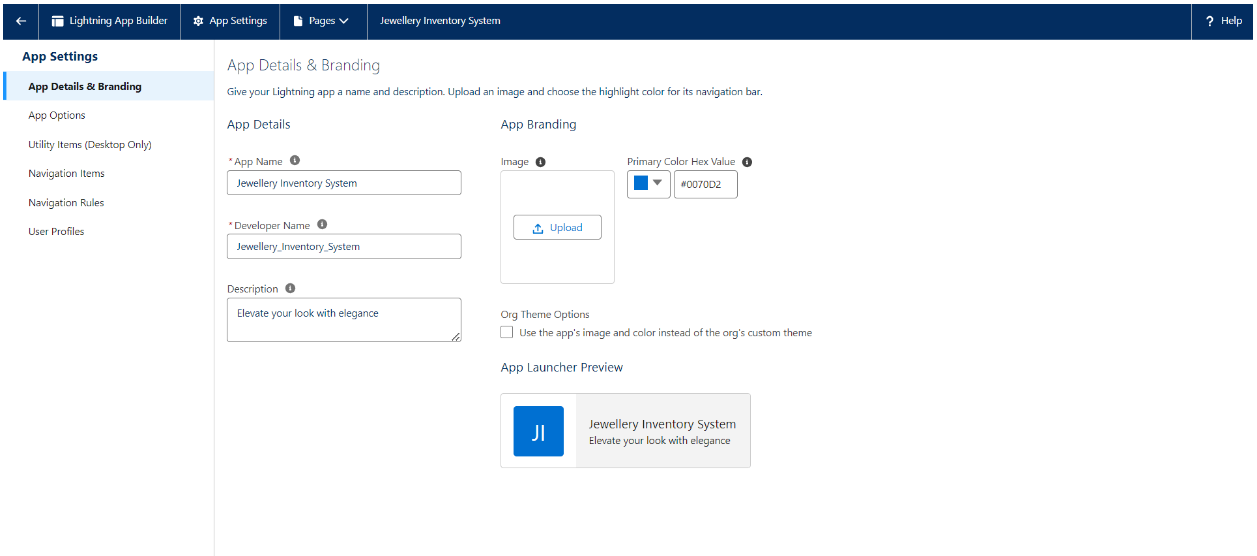
Fill the app name in app details and branding as follow
App Name : Jewellery Inventory System.
Developer Name : This will auto populated
Description : Elevate your look with elegance

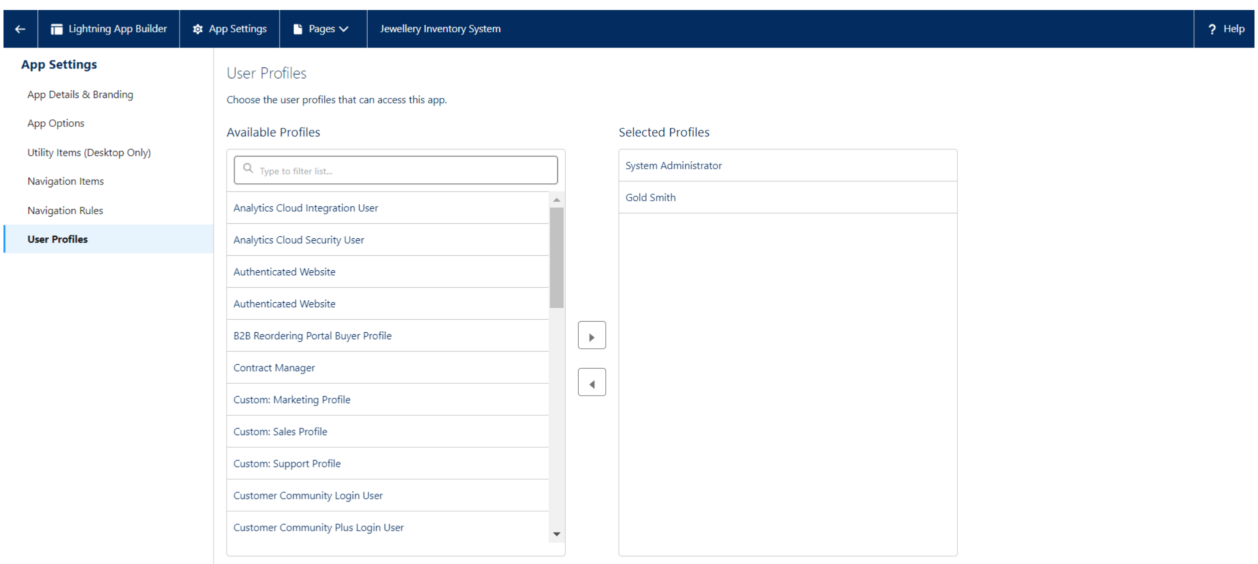
Image : optional (if you want to give any image you can otherwise not mandatory)
Primary color hex value : keep this default.
Then click Next >> (App option page)Set Navigation Style as Standard Navigation >> Next.
(Utility Items) keep it as default >> Next.

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.



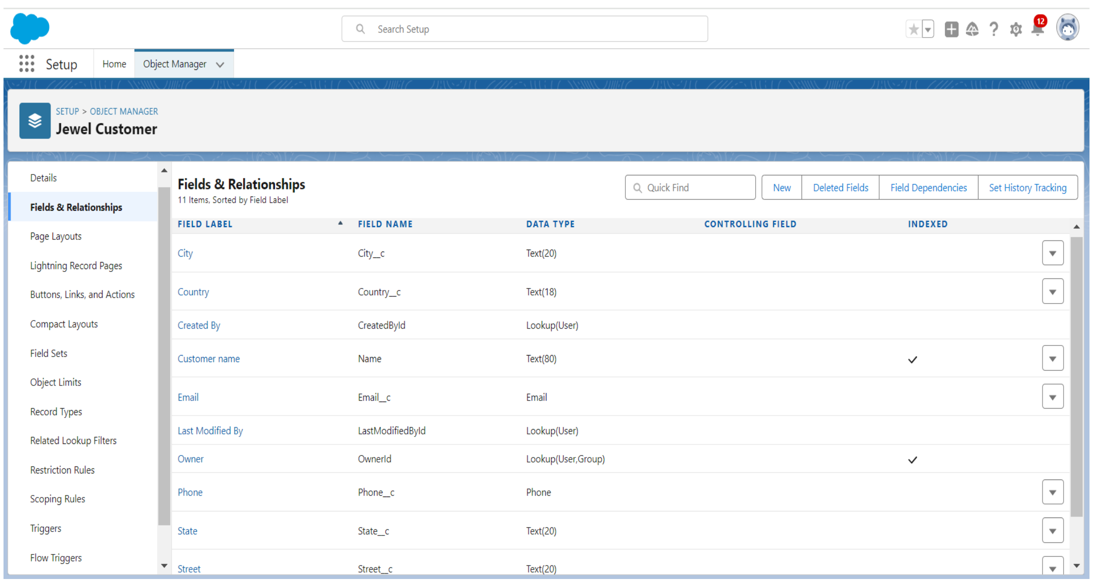

Lightning App Builder
App Settings
Pages
Jewellery Inventory System
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
Navigation Rules
User Profiles
App Details & Branding
Give your Lightning app a name and description. Upload an image and choose the highlight 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
Image
Upload
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
JI
Jewellery Inventory System
Elevate your look with elegance

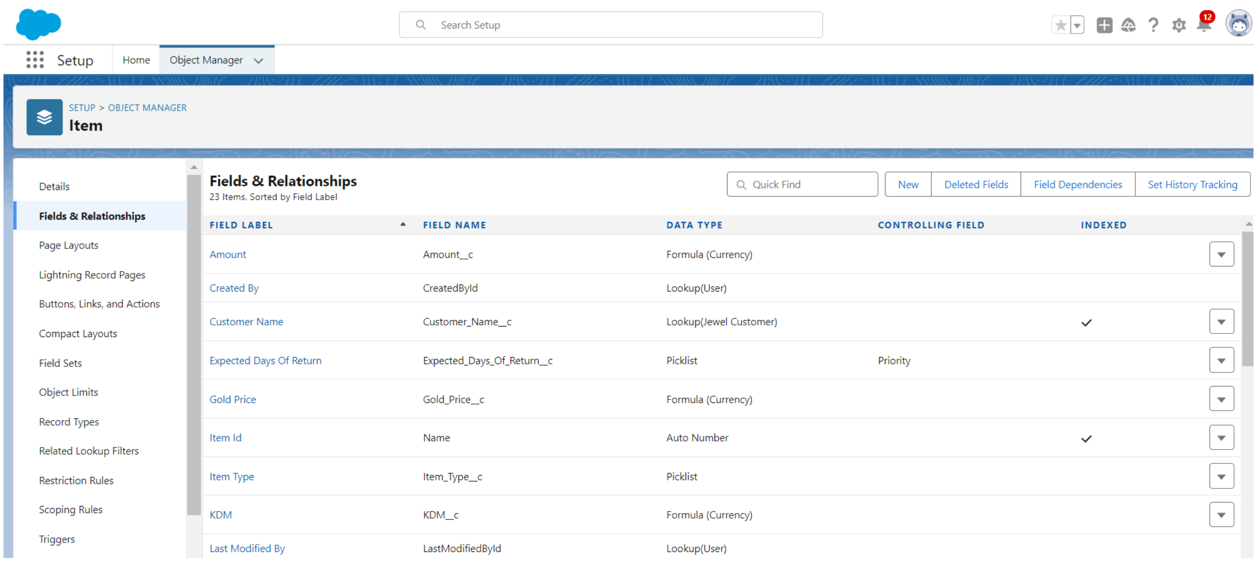

Lightning App Builder
App Settings
Pages
Jewellery Inventory System
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
Navigation Rules
User Profiles
User Profiles
Choose the user profiles that can access this app.
Available Profiles
Type to filter list...
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

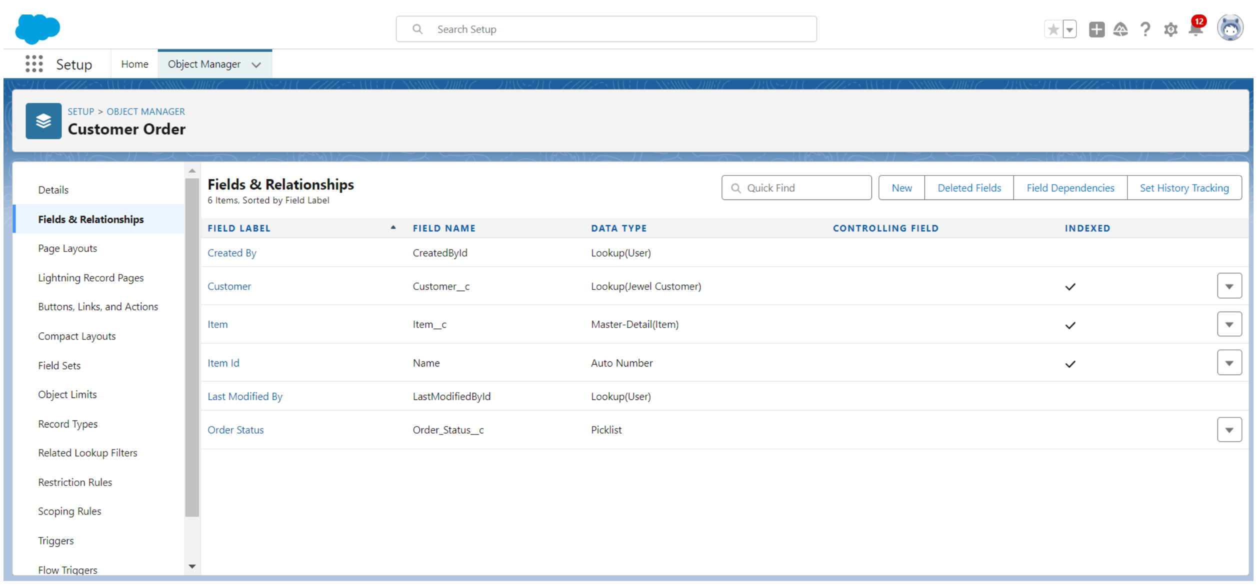
FIELDS

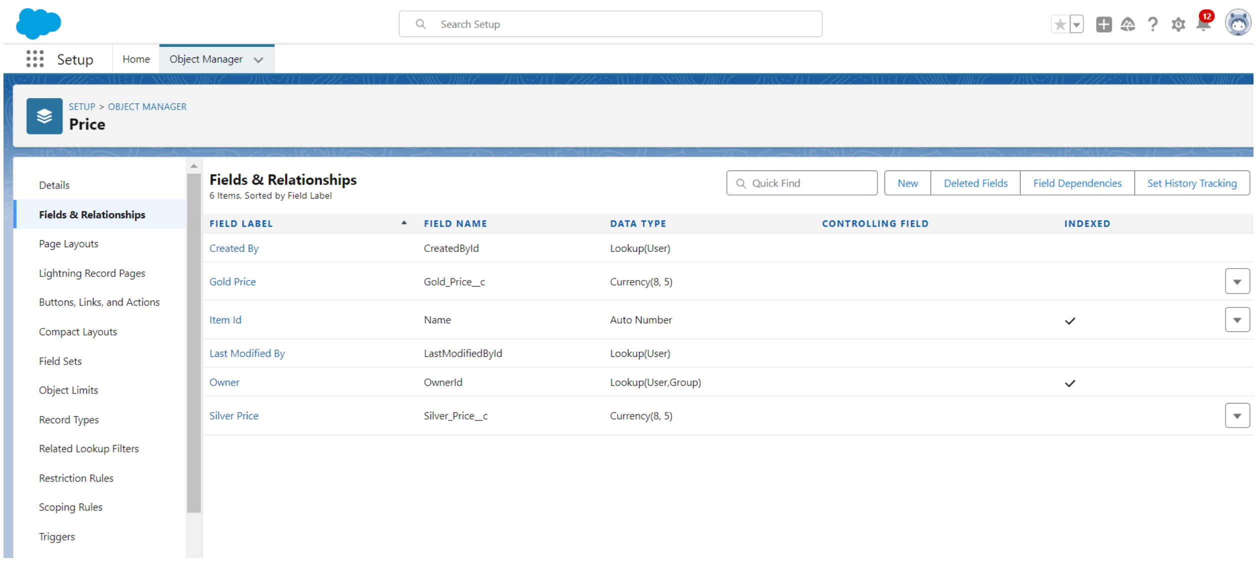
Creation of Lookup Relationship Field on Volunteer Object :

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.

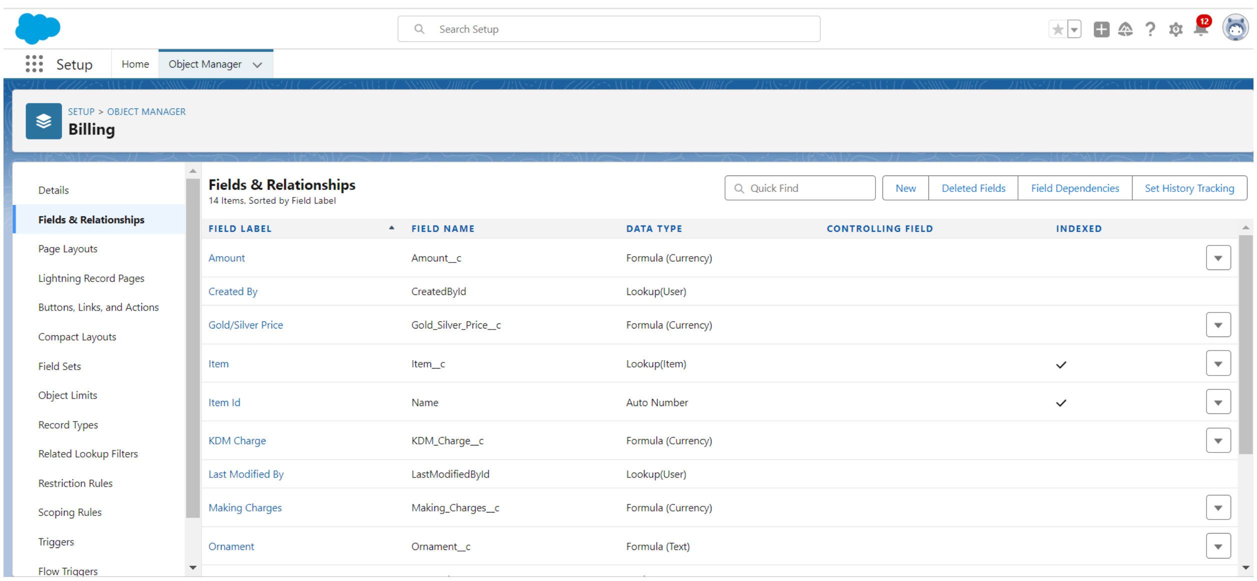



Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Item
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Fields & Relationships
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



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)		

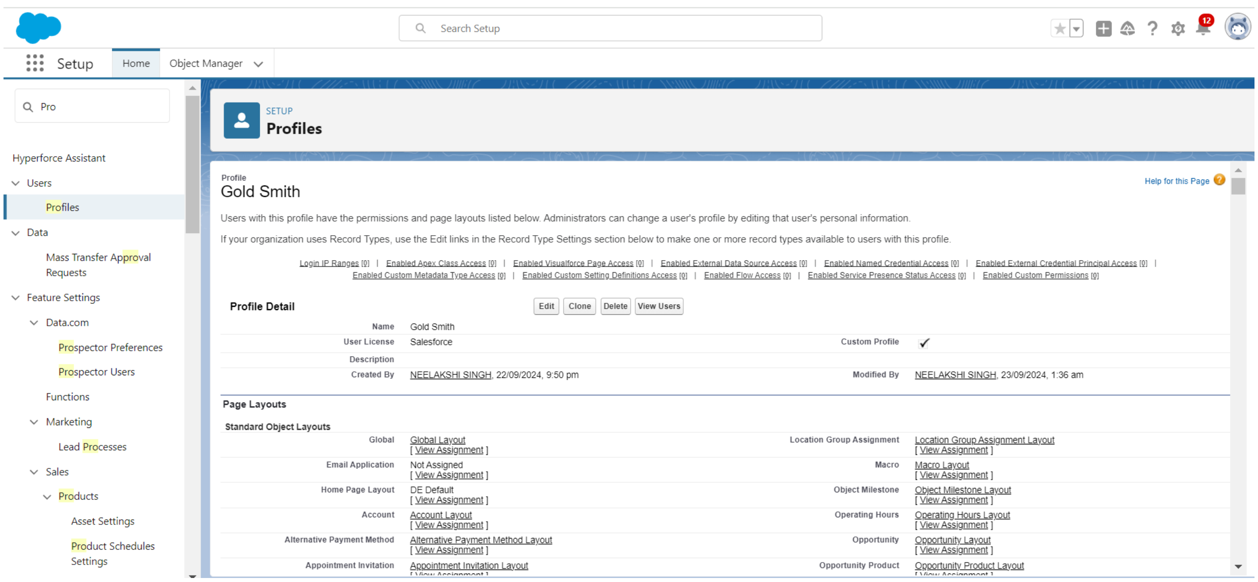


FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Gold/Silver Price	Gold_Silver_Price__c	Formula (Currency)		
Item	Item__c	Lookup(Item)		✓
Item Id	Name	Auto Number		✓
KDM Charge	KDM_Charge__c	Formula (Currency)		
Last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

PROFILES

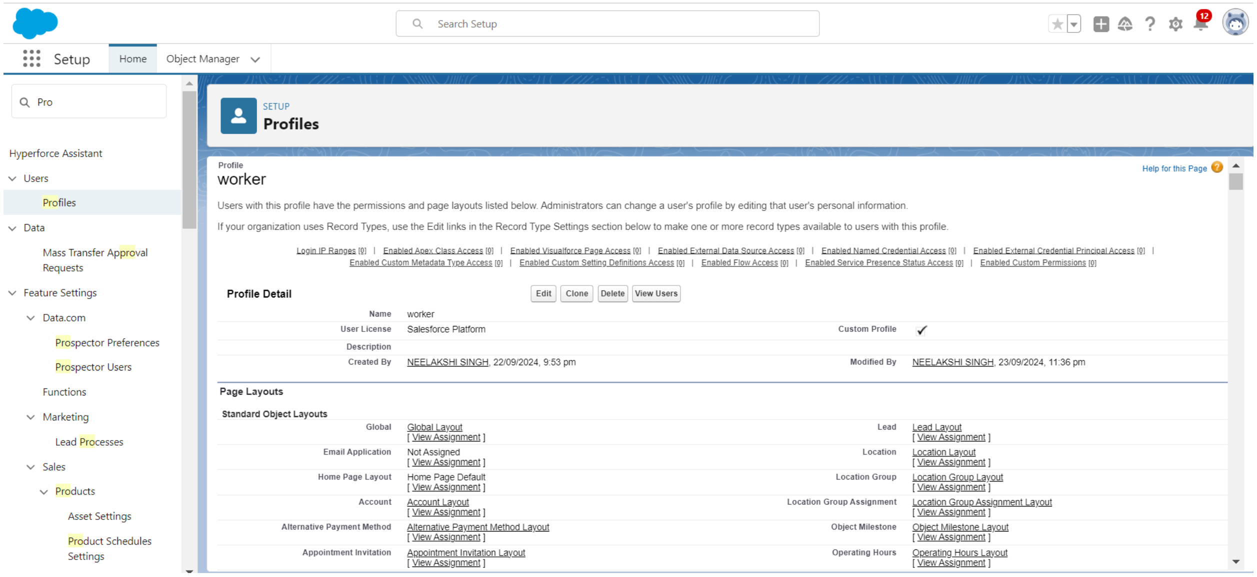
To create a Gold Smith profile:

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,Customer Order,Prices,Billings .
Scroll down and Click on Save.



To create a worker profile:

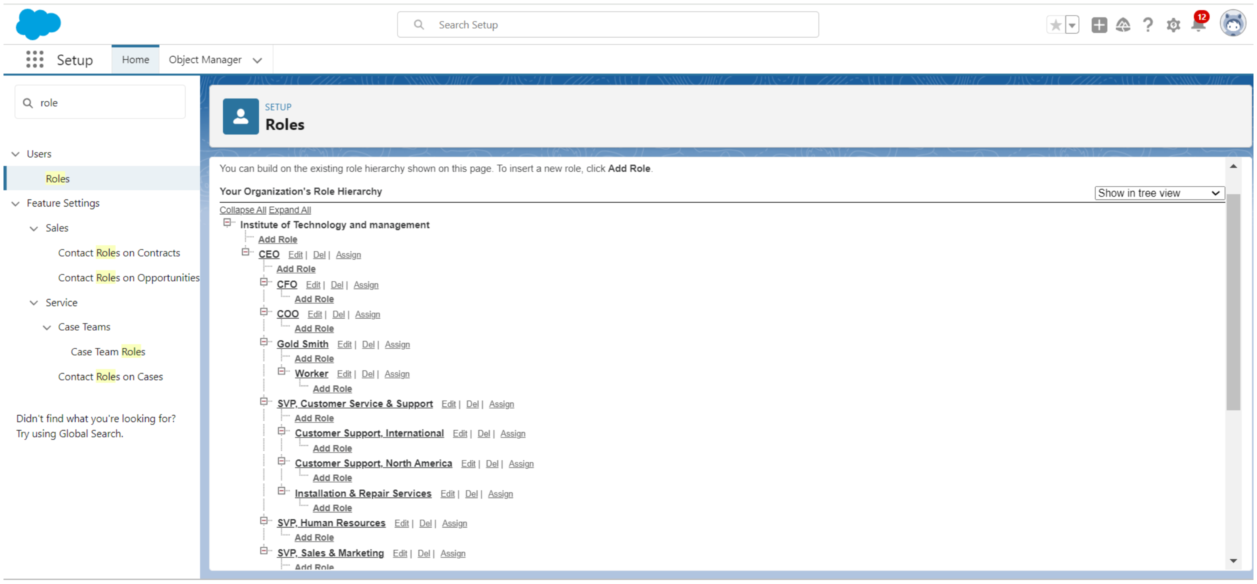
1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Salesforce Platform User) >> enter profile name as worker profile>> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for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



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.

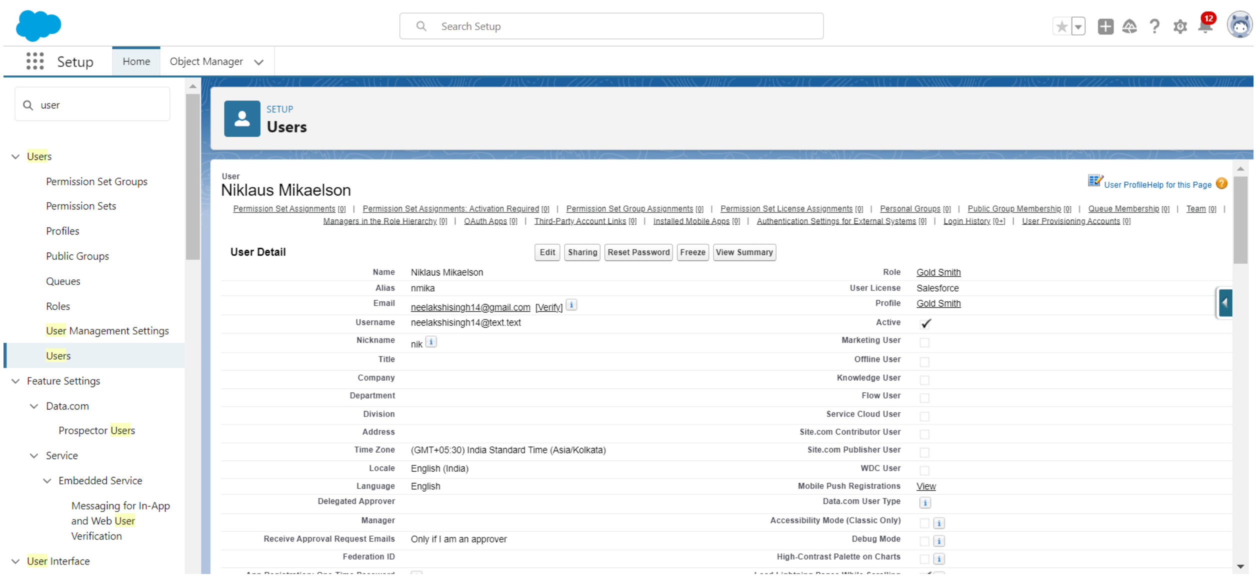


CREATION OF USERS

creation of first user:

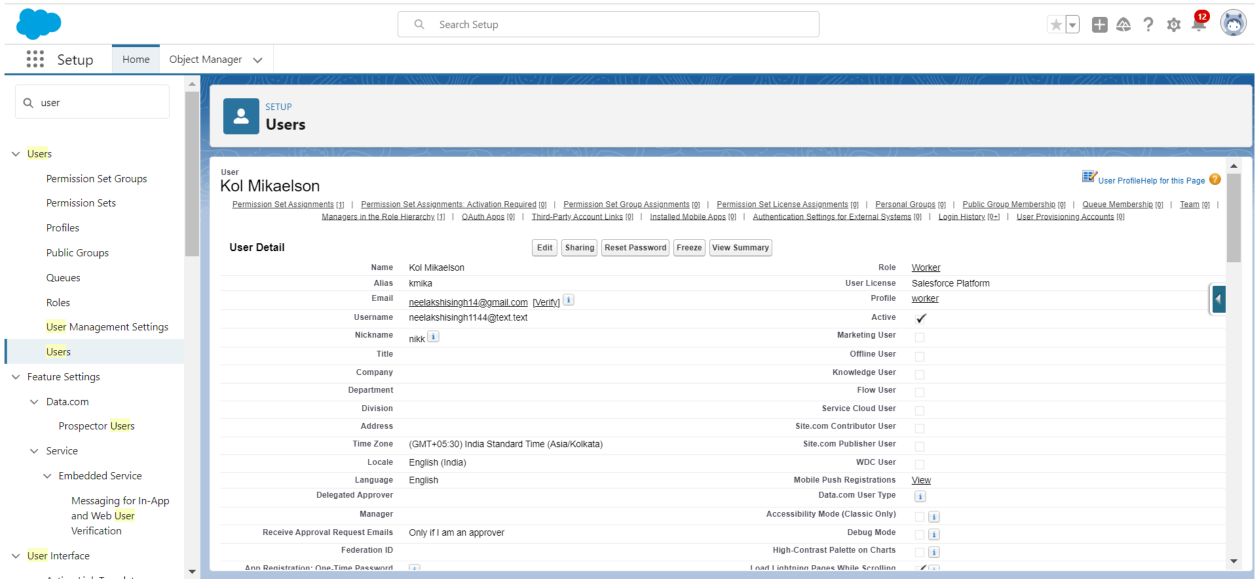
1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
   1. First Name : Niklaus
   2. Last Name : Mikaelson
   3. Alias : Give a Alias Name
   4. Email id : Give your Personal Email id
   5. Username : Username should be in this form: text@text.text
   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.



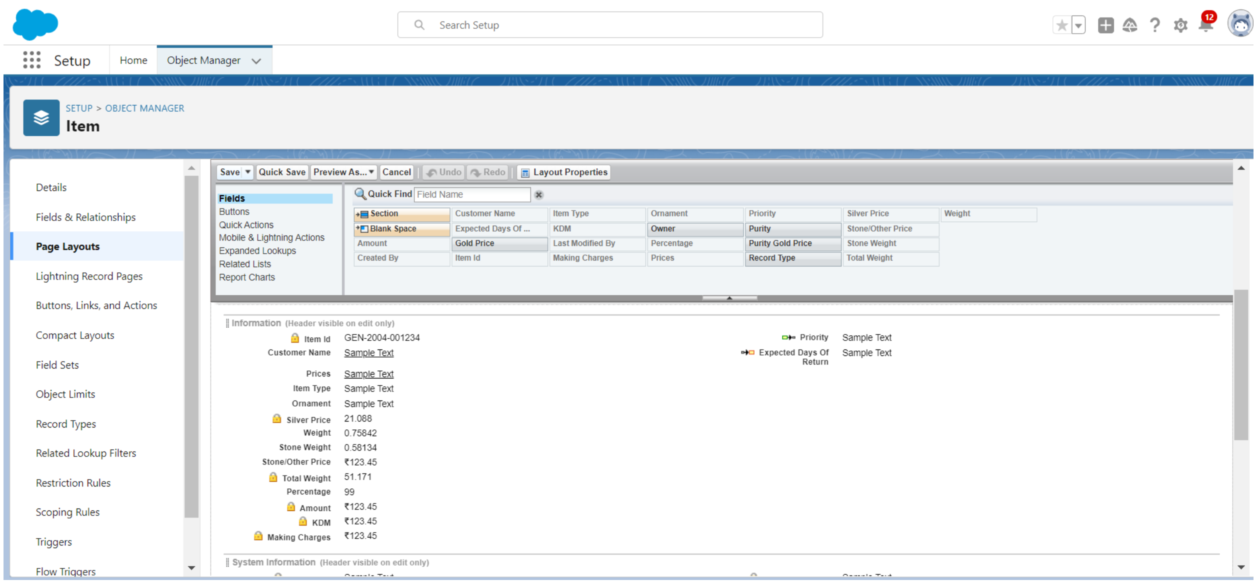
Page Layouts

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.

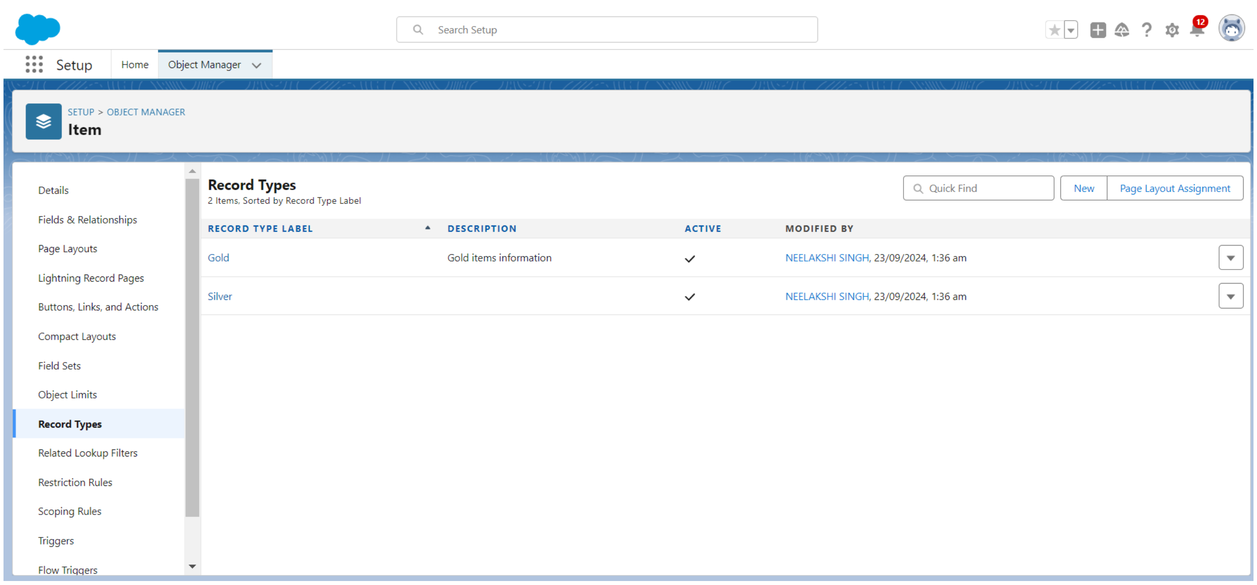
2.Click on the Record Types >> click New.

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.

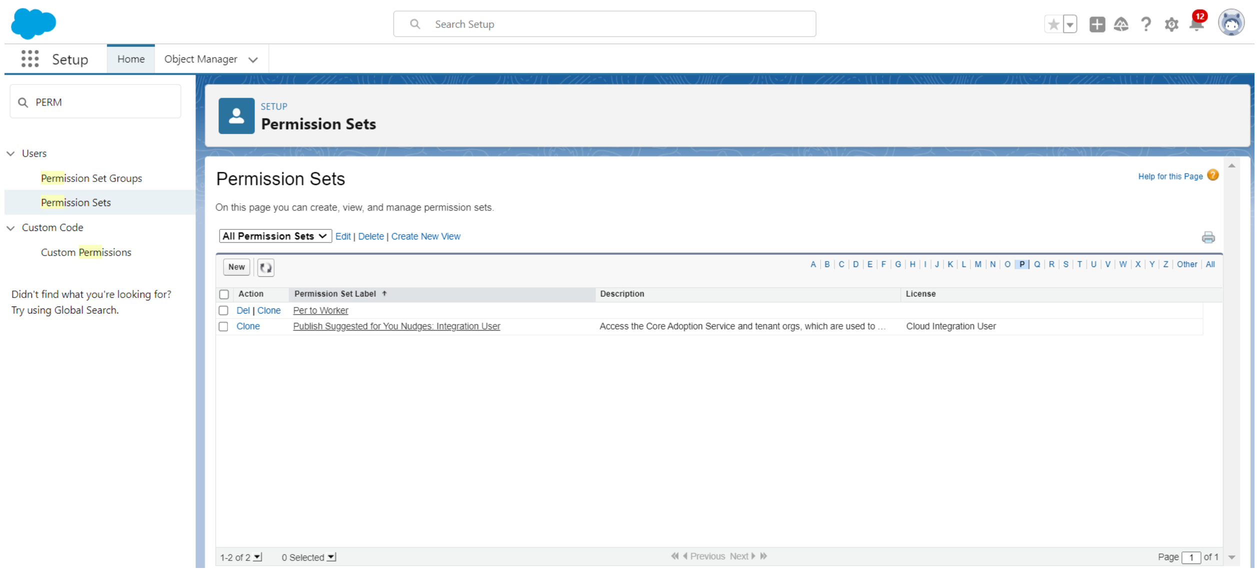


PERMISSION SETS

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.

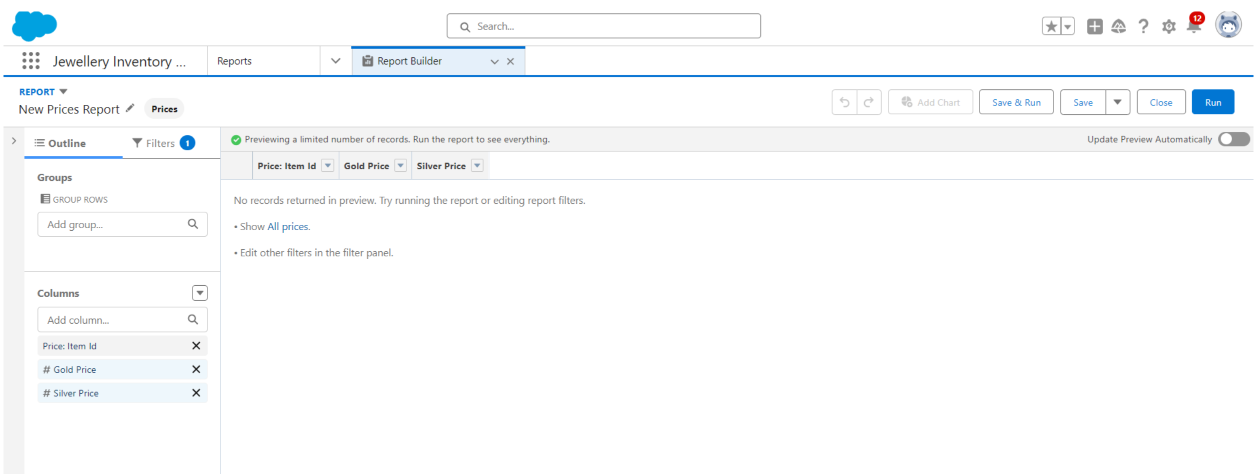
Delete A Record(Jewel Customer):

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”.

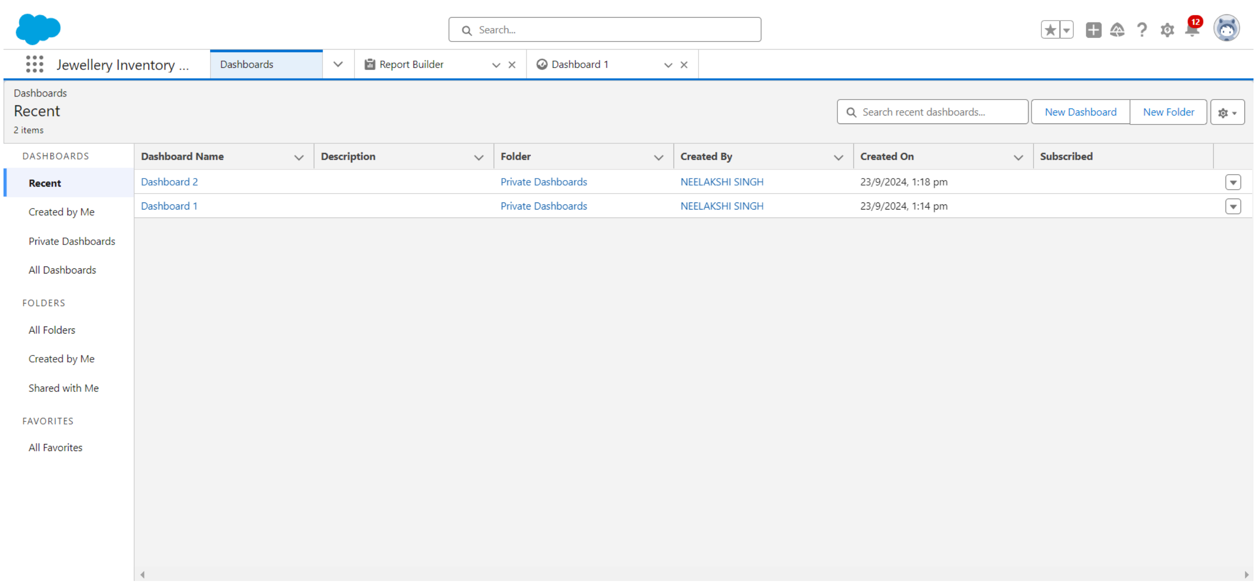


DASHBOARDS

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

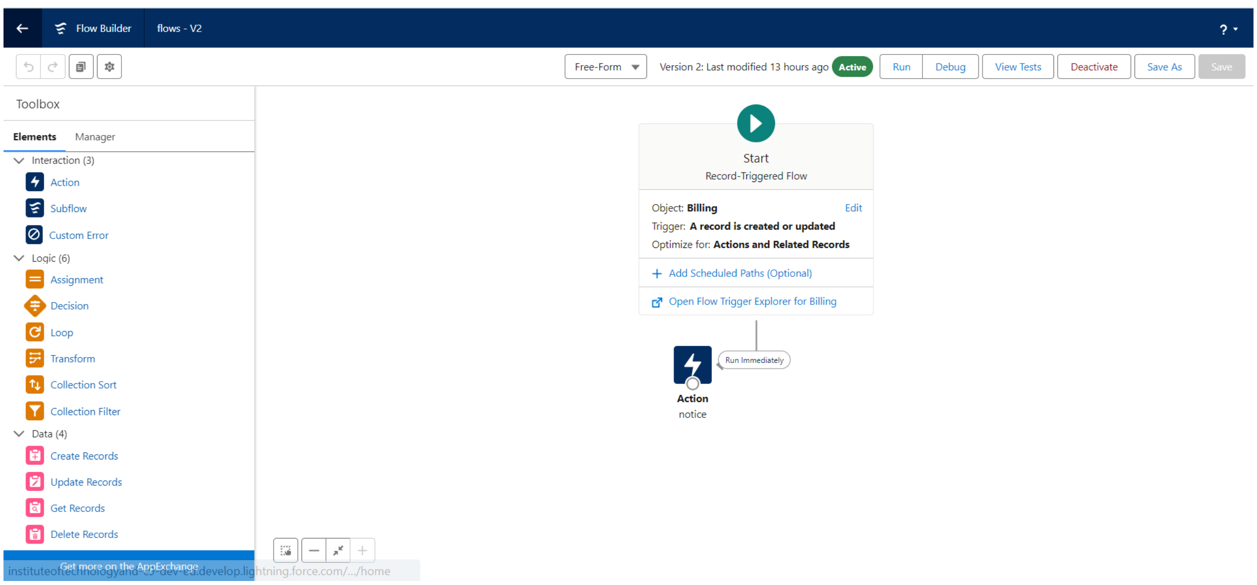


FLOWS

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.



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.