

CRM APPLICATION FOR JEWEL MANAGEMENT- DEVELOPER

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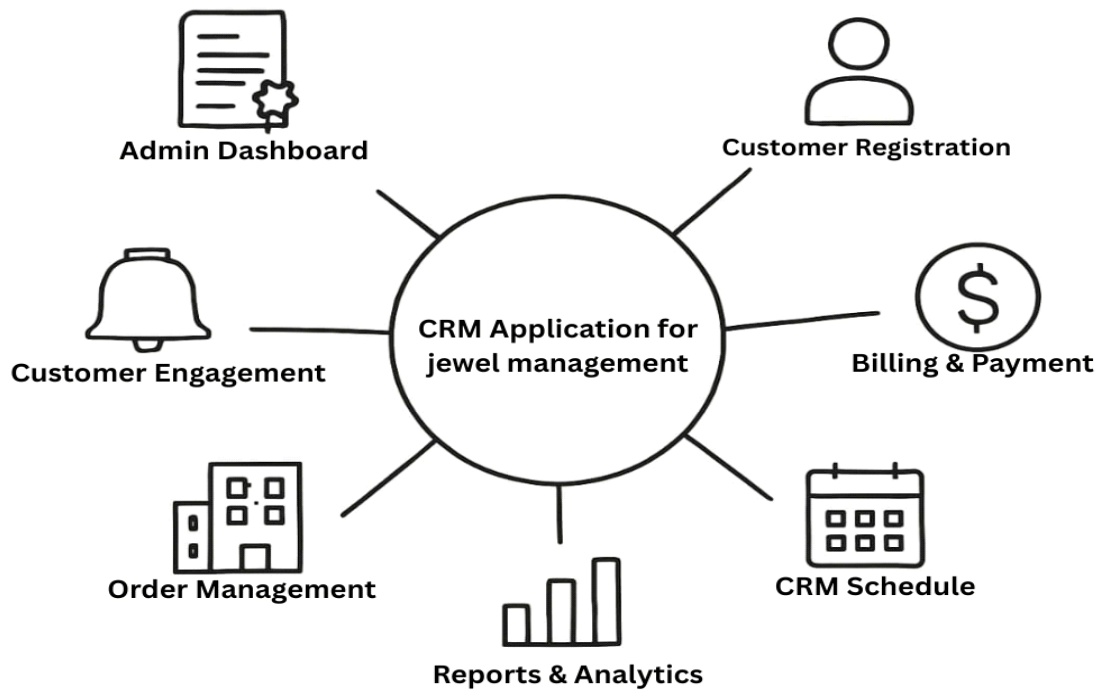
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1.INTRODUCTION

1.1 Project Overview

The CRM (Customer Relationship Management) application is designed to manage jewel sales, customer interactions, and inventory in a streamlined manner. It provides an end-to-end solution for jewel shops, enabling effective tracking of customers, orders, payments, and reports.



1.2 Purpose

The CRM Application for Jewel Management is designed to streamline jewellery business operations by managing customer details, orders, and inventory efficiently. It automates billing and payment tracking, enhances customer engagement through notifications and offers, and provides analytical reports for informed decision-making. The system also ensures secure admin control and improves overall operational efficiency.

DEVELOPMENT PHASE

Creating Developer Account:

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

- First name & Last name
- Email
- Role: Developer
- Company: College Name
- Country: India
- Postal Code: pin code
- Username: should be a combination of your name and company

This need not be an actual email id you can give anything in the format: username@organization.com

Click on sign me up after filling these.



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First name	Last name
<input type="text" value="Abinaya"/>	<input type="text" value="L"/>
Job title	Work email
<input type="text" value="Developer"/>	<input type="text" value="abilaxabinaya@g"/>
Company	Country/Region
<input type="text" value="Adithya College of Ar"/>	<input type="text" value="India"/>

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☒ I agree to the Main Services Agreement, Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation, (1) the Developer Edition includes autonomous and other generative AI features, and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

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<input type="checkbox"/> I'm not a robot	
--	--

Sign Me Up

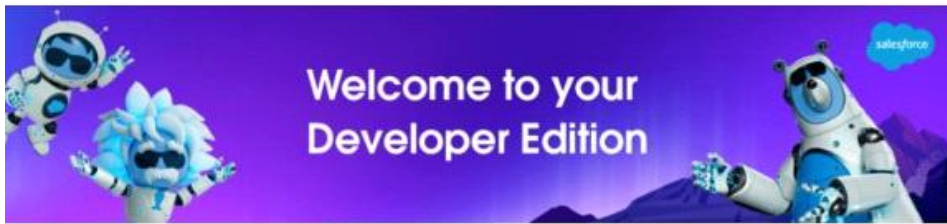


Almost there! Check your email.

You'll receive a confirmation email soon. If you don't see the email, check your spam folder.

If we're getting a lot of signups at once, it can take a while for us to set up your Developer Edition. We'll send another email when it's ready. Follow guided steps to finish setting it up, and use in-app guidance to learn Agentforce.





Hi Abinaya,

Thanks for signing up for a Developer Edition. Now you can start building on Salesforce for free and get hands-on with Agentforce and Data Cloud.

There's just one more step. Use the following link to reset the password for your Developer Edition. This link expires in 24 hours.

[Reset Password](#)

To easily log in later, save this URL:

<https://orgfarm-2ee618740b-dev-ed.develop.my.salesforce.com>

Here's the username for your Developer Edition:

abilaxabinaya344@agentforce.com

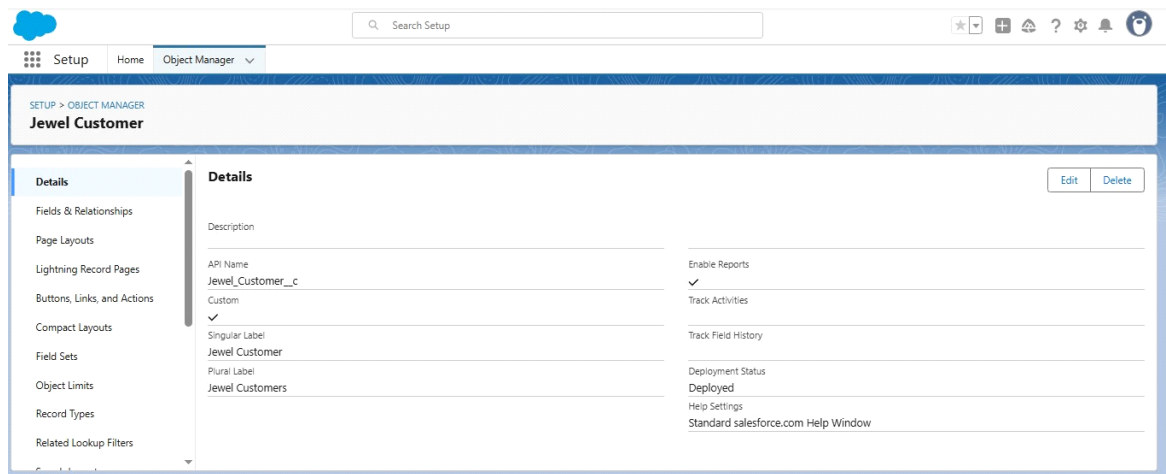
To Create Jewel Customer Object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
2. Enter the label name : Jewel Customer
3. Plural label name : Jewel Customers

The screenshot shows the 'Enter Record Name Label and Format' configuration page in Salesforce. The 'Record Name' field is set to 'Customer' with an example of 'Account Name'. The 'Data Type' is set to 'Text'. Under 'Optional Features', 'Allow Reports' is checked, while 'Allow Actions', 'Track Field History', 'Allow in Classic Layouts', and 'Enable Lightning' are unchecked. Under 'Object Classification', 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access' are all checked. Under 'Deployment Status', 'In Development' is selected. A 'What's New?' link is visible in the bottom right corner.

- Enter Record Name Label and Format
Record Name >> Customer name

Data Type >> Text



Create Item Object:

1.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

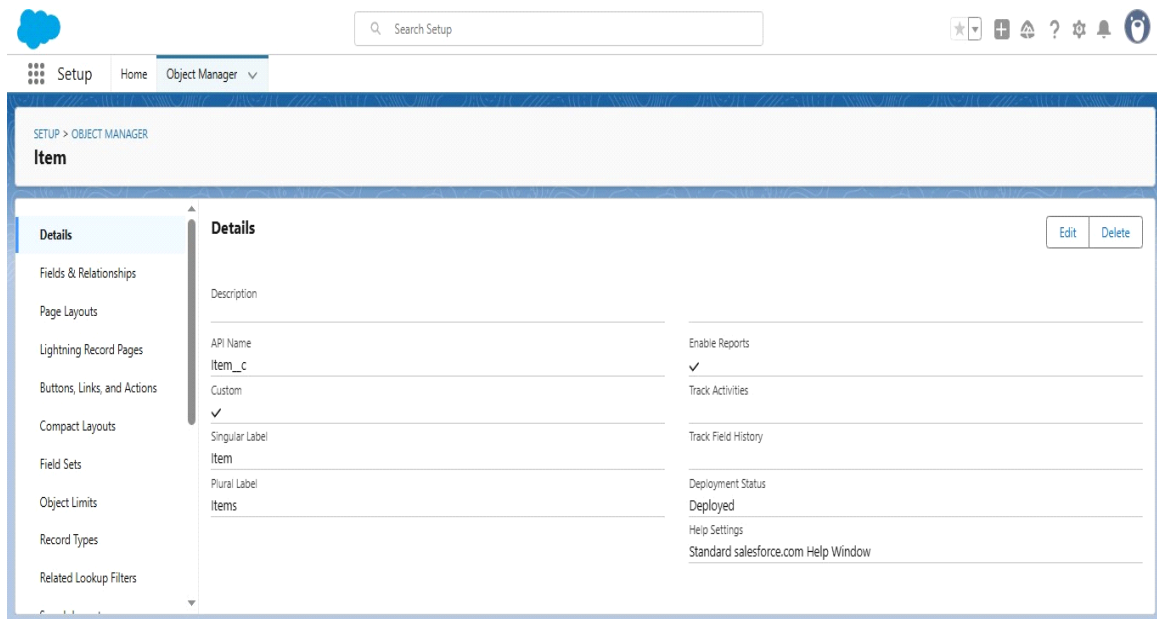
Data Type >> Auto Number

Display Format >> Item-{00}

Starting Number >> 1

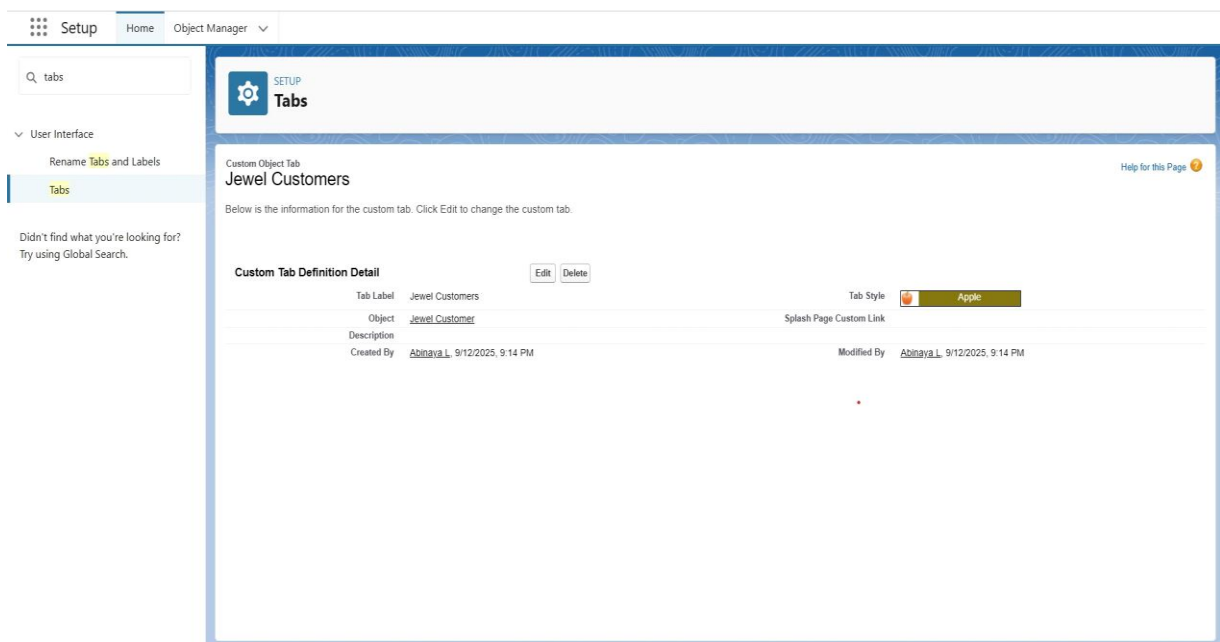
2.Click on Allow reports.

3.Allow search >> Save.



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.

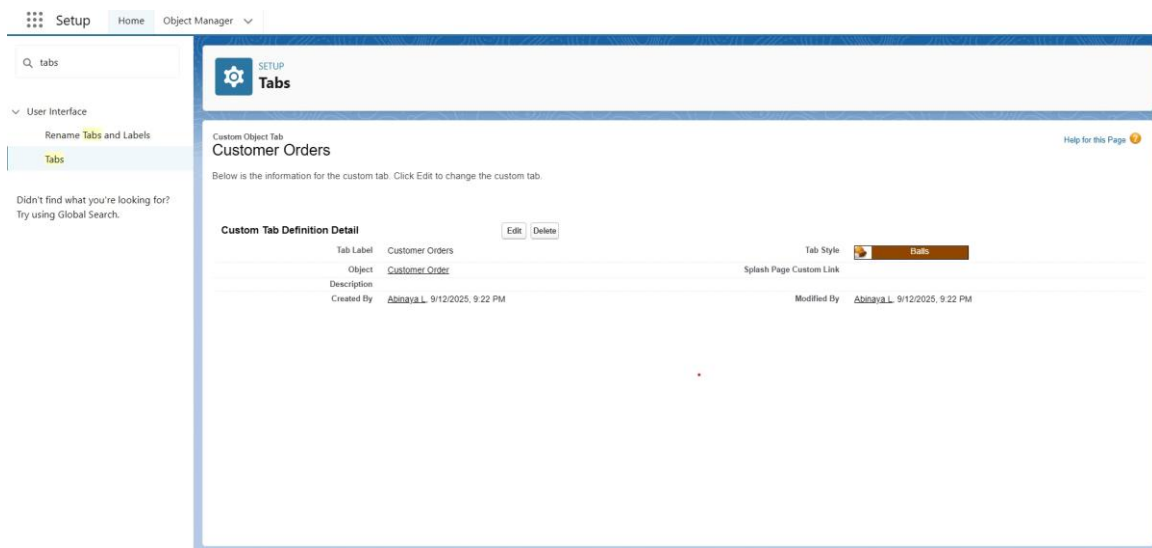


To create a Tab:(Item)

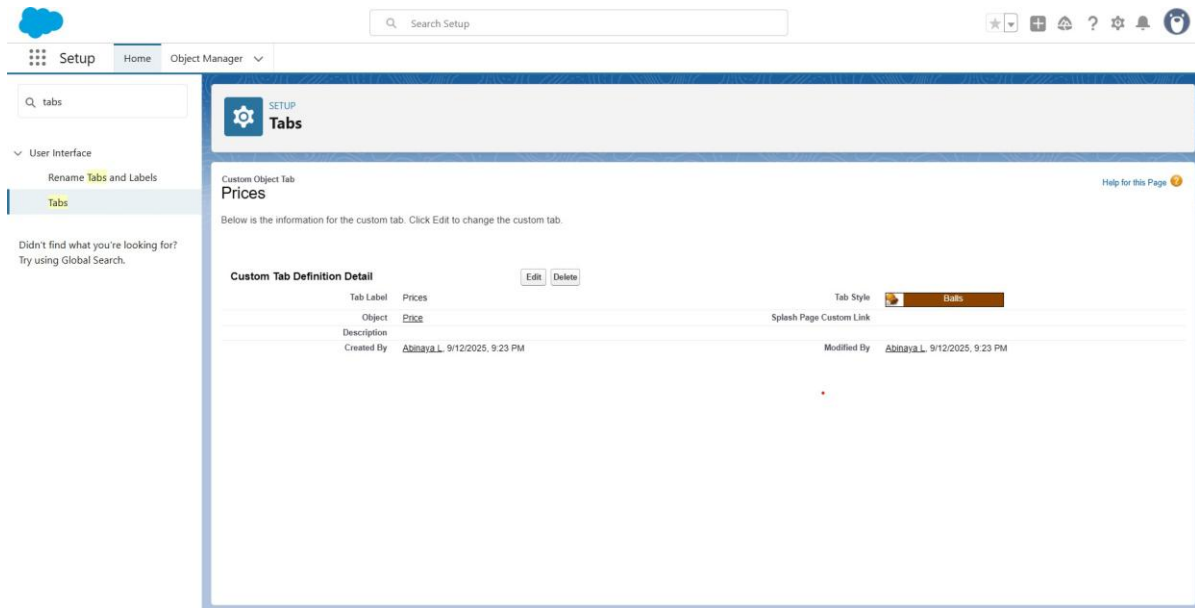
- Go to setup page >> type Tabs in Quick Find bar >> click on tabs
- New (under custom object tab)
- Select Object(Item)
- Select the tab style
- Next (Add to profiles page) keep it as default
- Next (Add to Custom App) keep it as default
- Save

To create tabs for Customer Order, Price, Billing objects.

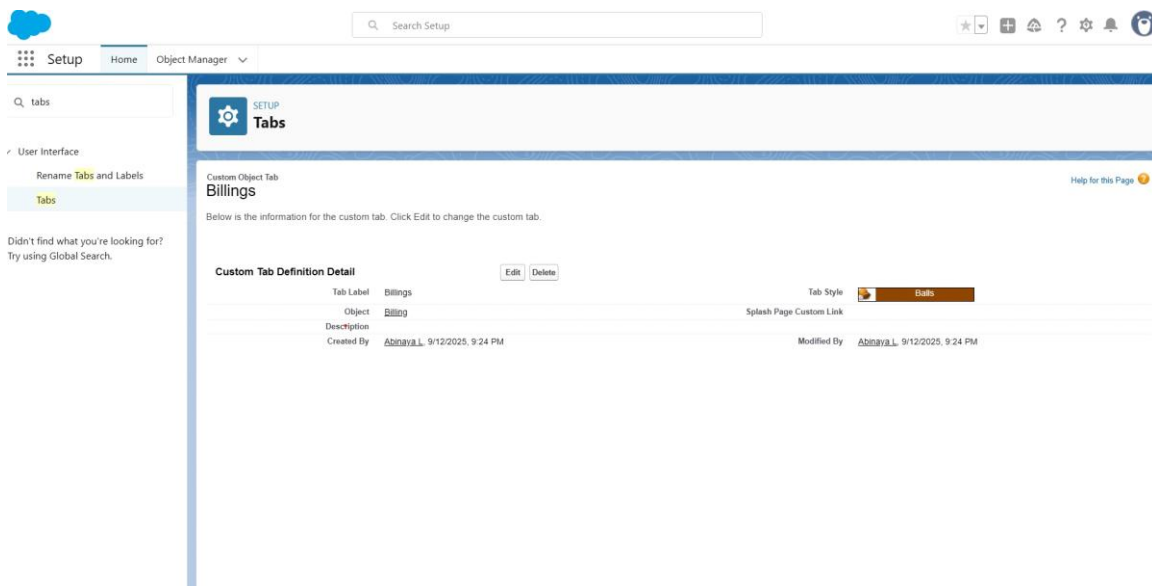
- create customer order



- create price



- create billings object



To create a lightning app page:

1. 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 colour hex value : keep this default.

Then click Next >> (App option page) Set Navigation Style as Console 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 displays the Lightning Experience App Manager interface. At the top, there is a search bar labeled "Search Setup". Below the search bar, the interface is divided into a sidebar on the left and a main content area. The sidebar contains navigation links such as "Setup Home", "Salesforce Go", "Service Setup Assistant", "Commerce Setup Assistant", "Field Service Setup Home (Beta)", "Hyperforce Assistant", "Release Updates", "Salesforce Mobile App", "Lightning Usage", "Optimizer", "Sales Cloud Everywhere", "ADMINISTRATION", "Users", "Data", "Email", "PLATFORM TOOLS", "Subscription Management", and "Apps". The main content area is titled "Lightning Experience App Manager" and shows a list of 27 items, sorted by App Name. The list includes various apps like All Tabs, Analytics Studio, App Launcher, Approvals, Automation, Bolt Solutions, Community, Content, Data Cloud, Data Manager, Digital Experiences, Jewellery Inventory System, Lightning Usage App, Marketing CRM Classic, and My Service Journey. Each item has columns for App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. The interface also includes a "Quick Find" search bar in the sidebar and a "New Lightning App" button in the top right corner.

App Name	Developer Name	Description	Last Modified Date	App Type	Visibility
1 All Tabs	AllTabSet		9/9/2025, 9:32 AM	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	9/9/2025, 9:32 AM	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	9/9/2025, 9:32 AM	Classic	✓
4 Approvals	Approvals	Manage approvals and approval flows	9/9/2025, 9:32 AM	Lightning	✓
5 Automation	FlowsApp	Automate business processes and repetitive tasks.	9/9/2025, 9:40 AM	Lightning	✓
6 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	9/9/2025, 9:32 AM	Lightning	✓
7 Community	Community	Salesforce CRM Communities	9/9/2025, 9:32 AM	Classic	✓
8 Content	Content	Salesforce CRM Content	9/9/2025, 9:32 AM	Classic	✓
9 Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	9/9/2025, 9:32 AM	Lightning	✓
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	9/9/2025, 9:32 AM	Lightning	✓
11 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	9/9/2025, 9:32 AM	Lightning	✓
12 Jewellery Inventory System	Jewellery_Inventory_System	Elevate your look with elegance	9/12/2025, 9:41 PM	Lightning	✓
13 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	9/9/2025, 9:32 AM	Lightning	✓
14 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	9/9/2025, 9:32 AM	Classic	✓
15 My Service Journey	MSJApp	Discover new customer service capabilities.	9/9/2025, 9:32 AM	Lightning	✓

To Creating Lookup Relationship:

- Go to the setup page >> click on object manager >> type object name(Customer Order) in the quick find bar>> click on the object.
- Click on fields & relationship >> click on New.
- Select “Lookup relationship” as data type and click Next.
- Select the related object “Jewel Customer ”.

- Give Field Label as “Customer” and click Next.
- Next >> Next >> Save.

Setup > Object Manager > Customer Order

Fields & Relationships
5 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Jewel Customer)		✓
Customer Id	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Creating a Master-Detail Relationship:

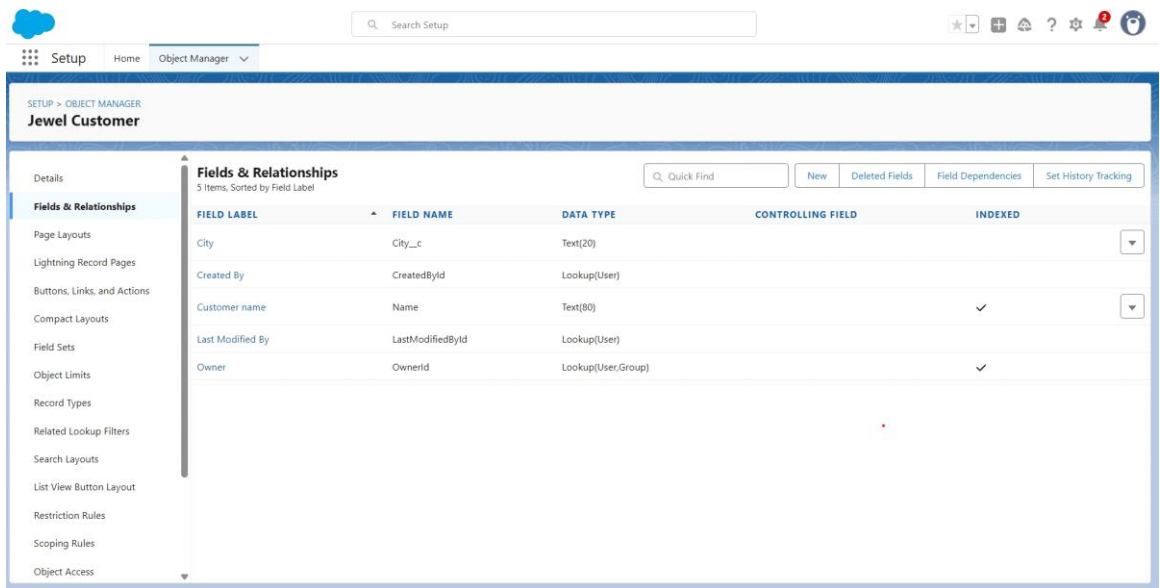
- Go to the setup page >> click on object manager >> type object name(Customer Order) in the quick find bar >> click on the object.
- 2.Click on fields & relationships >> click on New.
 - 3.Select “Master-Detail relationship” as data type and click Next.
 - 4.Select the related object “ Item”.
 - 5.Give Field Label as “Item” and click Next.
 - 6.Next >> Next >> Save.

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. A search bar is also present. The main content area is titled 'Customer Order' and shows the 'Fields & Relationships' section. A sidebar on the left lists various setup options like 'Page Layouts', 'Lightning Record Pages', etc. The 'Fields & Relationships' section displays a table with 5 items, sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The items listed are 'Created By', 'Customer', 'Customer Id', 'Item', and 'Last Modified By'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer_c	Lookup(Jewel Customer)		✓
Customer Id	Name	Auto Number		✓
Item	Item_c	Master-Detail(Item)		✓
Last Modified By	LastModifiedById	Lookup(User)		

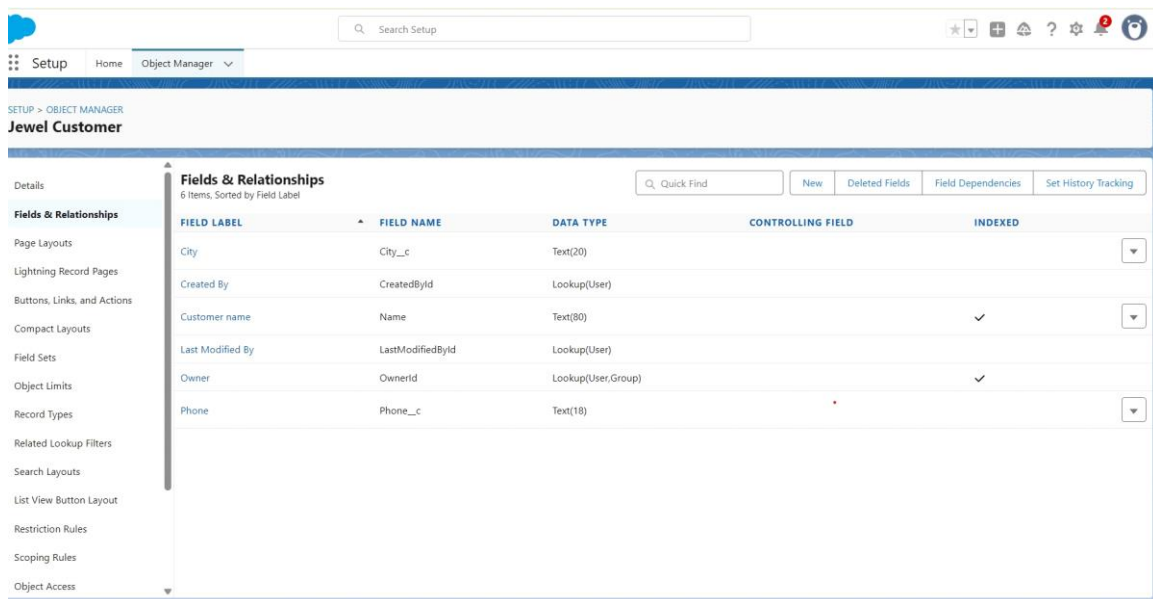
To Creating Text Field in Jewel Customer Object:

- Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.
- Now click on “Fields & Relationships” >> New
- Select Data type as “Text”.
- Click on Next
- Fill the above as following:
- Field Label: City
- Length : 20
- Field Name : gets auto generated
- Click on Next >> Next >> Save and new.



To creating the Phone field in object Jewel Customer:

- Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.
- Now click on “Fields & Relationships” >> New
- Select Data type as “Phone” and click Next.
- Given the Field Label as “ Phone”.
- Field Name will be auto populated, and click on Next >> Next >> Save & new.



To Creating the Email field in object Jewel Customer:

- Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object.
- Now click on “Fields & Relationships” >> New
- Select Data type as “Email” and click Next.
- Given the Field Label as “ Email”.
- Field Name will be auto populated, and click on Next >> Next >> Save.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar is present. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area displays the 'Fields & Relationships' section for the 'Jewel Customer' object. It shows a table with 7 items, sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The 'Email' field is highlighted.

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

To creating the number field in Item object:

- Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
- Now click on “Fields & Relationships” >> New
- Select Data type as “Number” and click Next.
- Given the Field Label as “ Purity” and length as “ 2 ”.
- Field Name will be auto populated, and click on Next >> Next >> Save.

Setup > OBJECT MANAGER > Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Step 2: Enter the details

Field Label: Purity

Length: 2

Decimal Places: 0

Field Name: Purity__c

Indexed: Yes

Help for this Page

To Creating Picklist Field in Item Object :

- Go to setup >> click on Object Manager >> type object name(Item) in quick find bar>> click on the object.
- Now click on “Fields & Relationships” >> New.
- Select Data type as “Picklist” and click Next.
- Enter Field Label as “Item Type”.
- In values select “Enter values(Gold,Silver), with each value separated by a new line” and enter values as shown below.

Setup > OBJECT MANAGER > Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Item Id	Name	Auto Number		✓
Item Type	Item_Type__c	Picklist		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Purity	Purity__c	Number(2, 0)		✓

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

To Create Currency Field in Price Object:

- Go to setup >> click on Object Manager >> type object name(Price) in quick find bar >> click on the object.
- Now click on “Fields & Relationships” >> New.
- Select Data type as “Currency” and click Next.
- Enter Field Label as “Gold Price” and length as “ 8”and decimal 0.Field name will be auto generated.
- Click Next >> Next >> Next >> Save .

The screenshot shows the Salesforce Setup interface for the 'Price' object. The 'Fields & Relationships' section is active, displaying the configuration for a new field. The 'Field Label' is 'Gold price', 'Length' is 8, and 'Decimal Places' is 0. The 'Field Name' is 'Gold_price'. The 'Description' and 'Help Text' fields are empty. The 'Previous', 'Next', and 'Cancel' buttons are visible at the top right of the configuration area.

To Creating Formula Field(Cross Object) in Item Object:

- Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
- Now click on “Fields & Relationships” >> New.
- Select Data type as “Formula” and click Next.
- Give Field Label and Field Name as “Gold Price” and select formula return type as “Currency” and click next.
- Under Advanced Formula write down the formula :

$$\text{Prices_r.Gold_price_c} / 10.$$
- click “Check Syntax” and Next >> Next >> Save & New.



To Creating the Field Dependencies:

- Go to setup >> click on Object Manager >> type object name(Item) in quick find bar >> click on the object.
- Click on Fields & Relationships and click on the Priority field.
- Search for Field Dependencies and click on New.
- Select Controlling Field as “Priority” and Depending field as “Expected Days of Return” >> Continue.
- Select the “Expected Days of Return” values of related Priority values and Click on Include Values >> Save.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Expected Days Of Return	Expected_Days_Of_Return__c	Picklist		
Gold Price	Gold_Price__c	Formula (Currency)		
Item Id	Name	Auto Number		✓
Item Type	Item_Type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓
prices	prices__c	Lookup(Price)		✓
Priority	Priority__c	Picklist		
Purity	Purity__c	Number(2, 0)		

To Creating the validation rule:

- Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar>> click on the object.
- Click on the validation rule >> click New.
- Enter the Rule name as “Postal Code “.
- Insert the Error Condition Formula as : -

```
AND(  
    OR(  
        LEN( Zip_Postal_code__c ) <> 6, NOT(REGEX(Zip_Postal_code__c, "^[0-9]  
{6}$"))),  
        NOT(ISBLANK(Zip_Postal_code__c))  
    )  
)
```

- Enter the Error Message as “Must contain 6 digits”, select the Error location as Field and select the field as “Zip/Postal code”, and click Save.

The screenshot displays the Salesforce Object Manager interface for the 'Jewel Customer' object. The 'Validation Rule Detail' section is active, showing the following configuration:

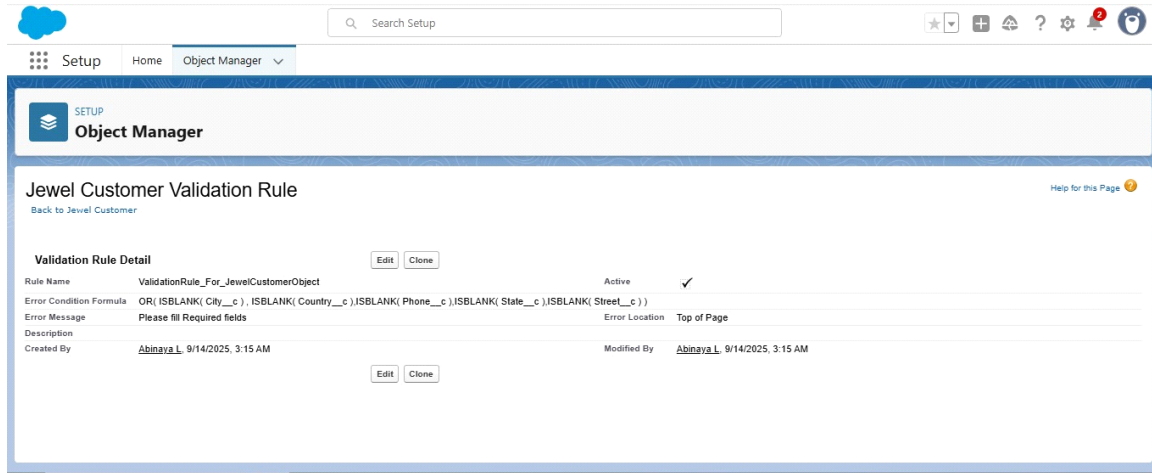
Validation Rule Detail	
Rule Name	Postal_Code
Error Condition Formula	AND(OR(LEN(Zip_Postal_code__c) <> 6, NOT(REGEX(Zip_Postal_code__c, ""[0-9]{6}\$"))), NOT(ISBLANK(Zip_Postal_code__c))))
Error Message	Must contain 6 digits, select the Error location as Field and select the field as "Zip/Postal code"
Error Location	Top of Page
Description	
Created By	Abhinava L., 9/14/2025, 2:58 AM
Modified By	Abhinava L., 9/14/2025, 2:58 AM

To Create One more Validation rule for Jewel Customer object:

- Enter Rule name as “ValidationRule For JewelCustomerObject “.
- Insert the Error Condition Formula as : -

OR(ISBLANK(City__c) , ISBLANK(Country__c),ISBLANK(Phone__c),ISBLANK(State__c),ISBLANK(Street__c))

- Enter the Error Message as “Please fill Required fields”, select the Error location as Top of Page and click Save.



The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' dropdown is selected. The main content area is titled 'Jewel Customer Validation Rule' with a 'Back to Jewel Customer' link and a 'Help for this Page' icon. Below the title is the 'Validation Rule Detail' section, which includes 'Edit' and 'Clone' buttons. The details are as follows:

Rule Name	ValidationRule_For_JewelCustomerObject	Active	✓
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	Error Location	Top of Page
Description			
Created By	Abinaya L. 9/14/2025, 3:15 AM	Modified By	Abinaya L. 9/14/2025, 3:15 AM

Below the details, there are 'Edit' and 'Clone' buttons.

To Create Validation rule for Item object:

- Enter Rule name as “ValidationRule For Item”.
- Insert the Error Condition Formula as : -

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))

- Enter the Error Message as “Please fill Required fields”, select the Error location as Top of Page and click Save

The screenshot shows the 'Item Validation Rule' configuration page in Salesforce. The page title is 'Item Validation Rule' with a 'Back to Item' link. Below the title is the 'Validation Rule Detail' section, which includes a table with the following information:

Validation Rule Detail		Edit	Clone
Rule Name	ValidationRule_For_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	Top of Page
Description			
Created By	Abinaya L. 9/14/2025, 3:56 AM	Modified By	Abinaya L. 9/14/2025, 3:56 AM

At the bottom of the table, there are 'Edit' and 'Clone' buttons.

To Create 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.

The screenshot shows the 'Clone Profile' dialog box in Salesforce. The dialog box has a title bar with a user icon and the word 'PROFILES'. The main content area is titled 'Clone Profile' and includes a 'Help for this Page' link. Below the title, there is a text input field for 'Enter the name of the new profile'. A message states: 'You must select an existing profile to clone from.' Below this message, there is a table with the following information:

Existing Profile	Item License	Profile Name
System Administrator	System Administrator	Gold Smith

At the bottom of the dialog box, there are 'Save' and 'Cancel' buttons.

To Create Worker Profile:

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

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'prof' entered, showing 'Profiles' under the 'Users' section. The main content area is titled 'SETUP Profiles' and shows the 'Worker Profile' details. The profile name is 'Worker Profile' and the user license is 'Work.com Only'. The 'Custom Profile' checkbox is checked. The 'Page Layouts' section shows 'Global' as the standard object layout and 'Payment Authorization' as the payment authorization layout. The 'Created By' and 'Modified By' fields both show 'Abinaya L.' with timestamps from 9/14/2025.

Profile: **Worker Profile**

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(0\)](#) | [Enabled Apex Class Access \(0\)](#) | [Enabled Visualforce Page Access \(0\)](#) | [Enabled External Data Source Access \(0\)](#) | [Enabled Named Credential Access \(0\)](#) | [Enabled External Credential Principal Access \(0\)](#) | [Enabled Custom Metadata Type Access \(0\)](#) | [Enabled Custom Settings/Definitions Access \(0\)](#) | [Enabled Flow Access \(0\)](#) | [Enabled Service Presence Status Access \(0\)](#) | [Enabled Custom Permissions \(0\)](#)

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

Name	Worker Profile		
User License	Work.com Only	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Abinaya L. 9/14/2025, 7:55 AM	Modified By	Abinaya L. 9/14/2025, 7:57 AM

Page Layouts

Standard Object Layouts	Global: Global Layout [View Assignment]	Payment Authorization	Payment Authorization Layout [View Assignment]
-------------------------	---	-----------------------	--

To 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.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'rol' and a navigation menu with categories like Users, Roles, Feature Settings, Sales, Service, and Case Teams. The main content area is titled 'Roles' and shows details for the 'Gold Smith' role. It includes a hierarchy, a list of users assigned to the role (currently empty), and a 'Role Detail' section with fields for Label, Role Name, Modified By, Opportunity Access, and Case Access.

Role: Gold Smith

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Adithya college of Arts and Science > CEO > Gold Smith
 Siblings: SVP Sales & Marketing SVP Customer Service & Support CFO SVP Human Resources COO

[Users in Gold Smith Role \(0\)](#)

Role Detail [Edit](#) [Delete](#)

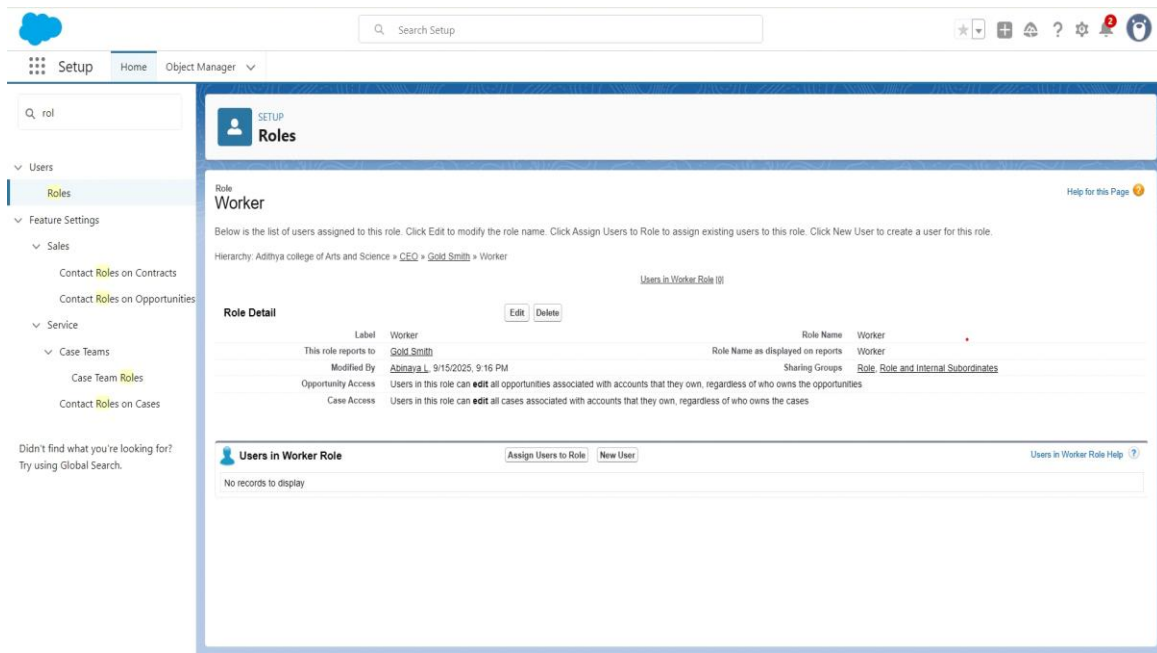
Label	Gold Smith	Role Name	Gold_Smith
This role reports to	CEO	Role Name as displayed on reports	Gold Smith
Modified By	Abhinav.LL 9/15/2025 9:13 PM	Sharing Groups	Role Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, 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 [Assign Users to Role](#) [New User](#) [Users in Gold Smith Role Help](#)

No records to display

To Create another 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.



To Create User:

1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields

First Name : Niklaus

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: Gold Smith

User licence: Salesforce

Profiles: Gold Smith

3.Save

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations

User Edit Save Save & New Cancel

General Information ⓘ Required Information

First Name: Niklaus
Last Name: Mikaelson
Alias: nmika
Email: abilaxabinaya@gmail.com
Username: abilaxabinaya@gmail.com
Nickname: User175799722205139488 ⓘ
Title:
Company:
Department:
Division:
Role: Gold Smith
User License: Salesforce
Profile: Gold Smith ⓘ
Active: ☒
Marketing User: ☐
Offline User: ☐
Knowledge User: ☐
Flow User: ☐
Service Cloud User: ☐
Site.com Contributor User: ☐
Site.com Publisher User: ☐
WDC User: ☐
Data.com User Type: --None-- ⓘ
Data.com Monthly Addition Limit: Default Limit (300) ⓘ
Accessibility Mode (Classic Only): ☐ ⓘ
High-Contrast Palette on Charts: ☐ ⓘ
Load Lightning Pages While Scrolling: ☒ ⓘ
Debug Mode: ☐ ⓘ
Quick Access Menu: ☒

To Create another 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.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Apps, Mobile Apps, Salesforce, Mobile Builder for the Seller-Focused Experience, Feature Settings, Data.com, Prospectors, Service, and Embedded Service. The main content area is titled 'New User' and contains a 'User Edit' form. The form has two tabs: 'General Information' and 'Role'. The 'General Information' tab is active and contains fields for First Name (Kol), Last Name (Mikaelson), Alias (kmika), Email (abilaxabinaya@gmail.com), Username (abilaxabinaya@gmail.com), Nickname (User175800410458080979), Title, Company, Department, and Division. The 'Role' tab contains fields for Role (Worker), User License (Salesforce Platform), Profile (Worker), Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type (None), Data.com Monthly Addition Limit (Default Limit (300)), Accessibility Mode (Classic Only), High-Contrast Palette on Charts, and Load Lightning Pages While Scrolling (checked).

To Create another 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

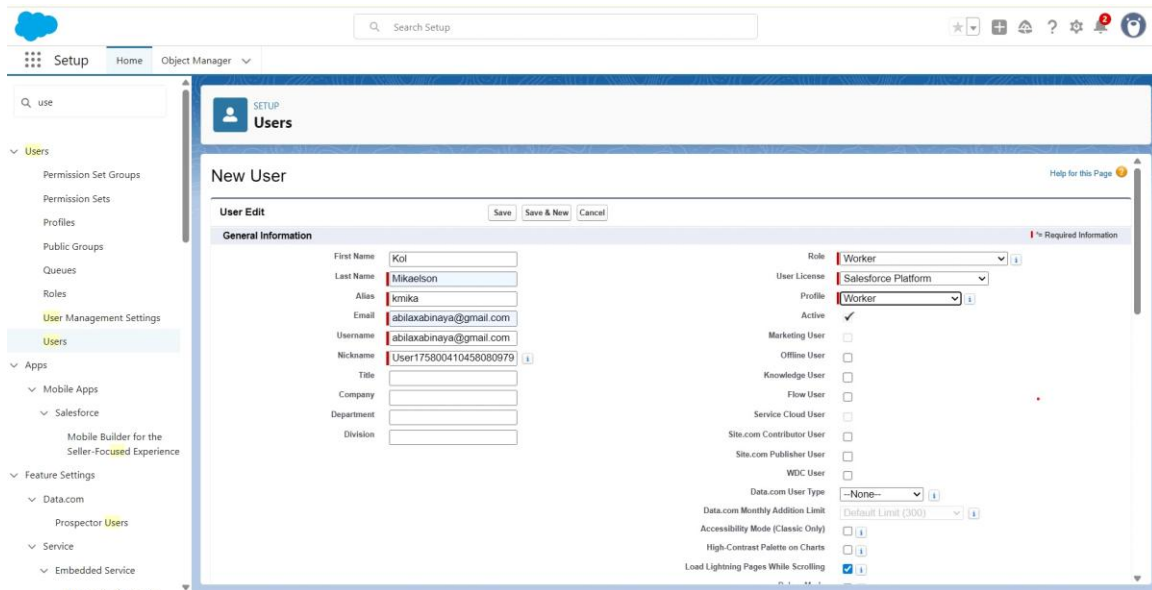
Nick Name : Give a Nickname

Role : Worker

User licence : Salesforce Platform

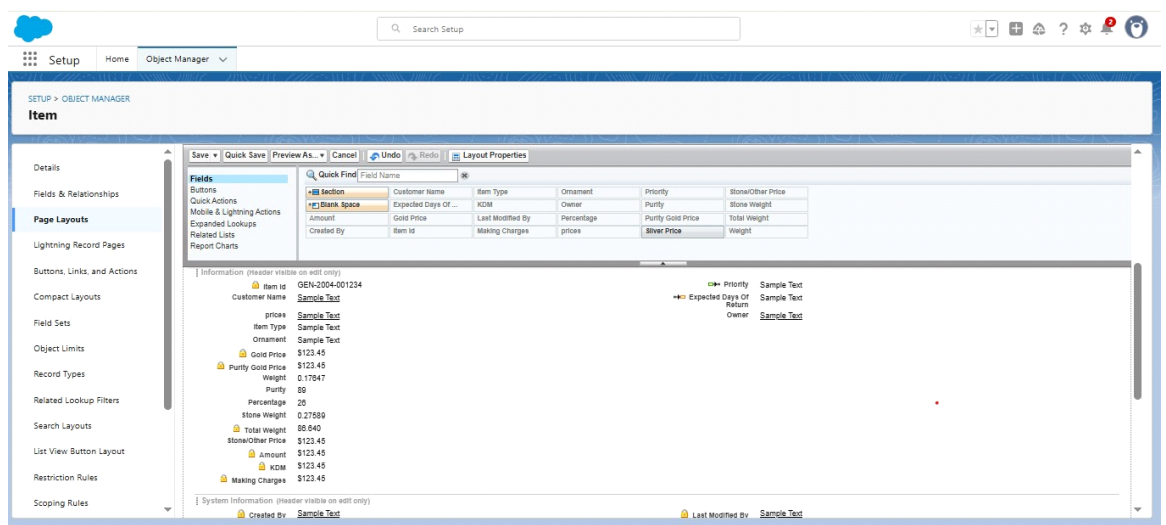
Profiles : Worker

3.Save.



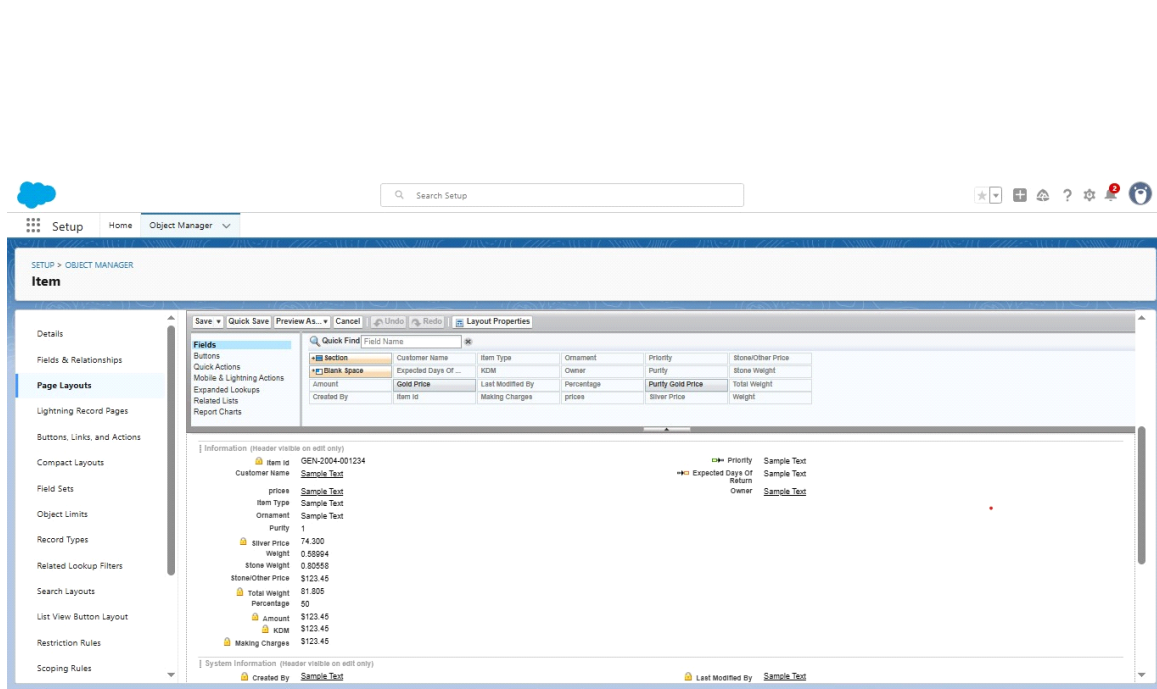
To Create a Gold Page layout:

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 and New.
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.



To Create a Silver Page 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 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.



To create a Record Type:

- 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”.

Setup > Object Manager > Item

New Record Type

Step 1. Enter the details. Step 1 of 2

Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record type selected below. After saving the new record type, you will be able to customize the picklist values.

Record Type

Existing Record Type: Required Information

Record Type Label:

Record Type Name:

Description:

Active: ☒

Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select Make Default. Users assigned to this record type can still view and edit records associated with record types not available for their profile.

Profile Name	Record Types Currently Available	Make Available	Make Default
Analytics Cloud Integration User		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration		<input type="checkbox"/>	<input type="checkbox"/>
Chatter External User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter Free User		<input type="checkbox"/>	<input type="checkbox"/>

5.Scroll down and check for the Gold Smith,Worker JW & 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.

Setup > Object Manager > Item

Record Type

Gold

Back to Custom Object: Item

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

Record Type Label: Edit

Record Type Name: Active ☒

Namespace Prefix:

Description:

Created By: 9/15/2025, 9:38 AM

Modified By: 9/15/2025, 9:38 AM

Action	Field	Modified Date
Edit	Expected Days Of Return	9/15/2025, 9:38 AM
Edit	Item Type	9/15/2025, 9:38 AM
Edit	Priority	9/15/2025, 9:38 AM

To create Create another Record Type:

- 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 “Silver”,Description as “Silver items information”.
- 4.Uncheck for “Make Available”.

Setup > OBJECT MANAGER > Item

New Record Type

Step 1 of 2: Enter the details

Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record type selected below. After saving the new record type, you will be able to customize the picklist values.

Record Type

Existing Record Type: Master

Record Type Label: Silver

Record Type Name: Silver

Description: Silver items information

Active: ☒

Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select Make Default. Users assigned to this record type can still view and edit records associated with record types not available for their profiles.

Profile Name	Record Types Currently Available	Make Available	Make Default
Analytics Cloud Integration User		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration		<input type="checkbox"/>	<input type="checkbox"/>
Chatter External User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter Free User		<input type="checkbox"/>	<input type="checkbox"/>

5.Scroll down and check for the Gold Smith,Worker JW & System Administrator profile and click on Next.

6.Select “Apply a different layout for each profile”, and change page layout to “Page Layout for silver” for Gold Smith,Worker and System Administrator ? save & new.

Setup > OBJECT MANAGER > Item

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

Record Type Name: Silver

Namespace Prefix:

Description: Silver items information

Created By: Admin

Modified By: Admin

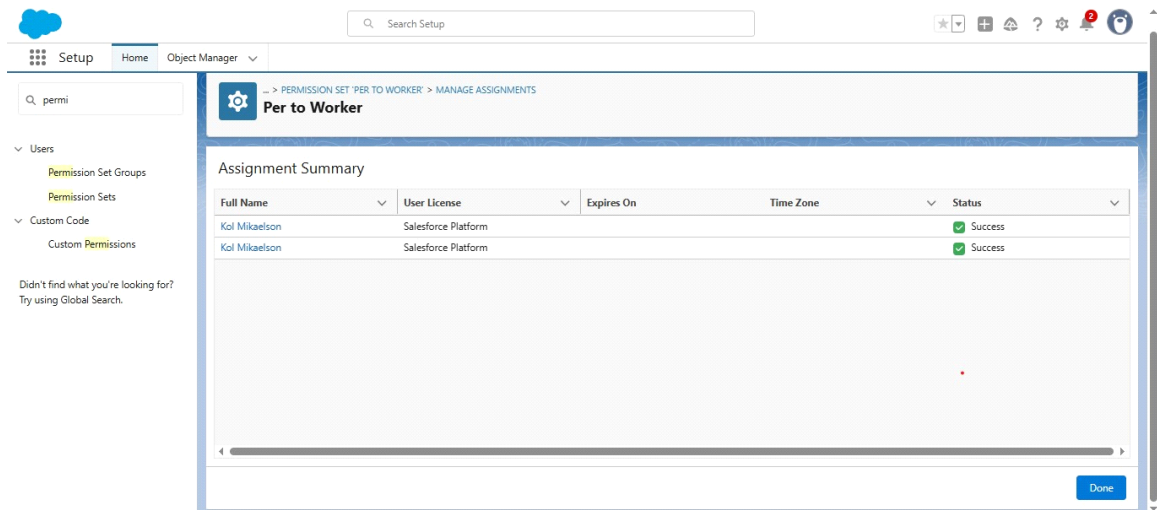
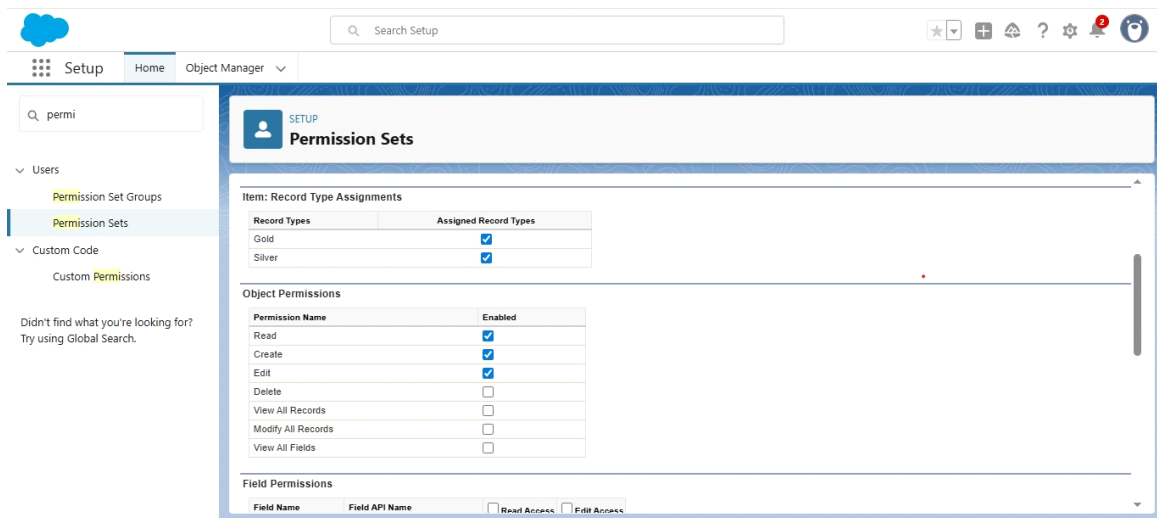
Picklists Available for Editing

Action	Field	Modified Date
Edit	Expected Days Of Return	9/19/2025, 9:43 AM
Edit	Item Type	9/19/2025, 9:43 AM
Edit	Priority	9/19/2025, 9:43 AM

To Creating permission set:

1. Go to setup >> type “permission sets” in quick search >> select permission sets >> New.
2. Enter the label name as “Per to Worker”, API will be auto populated ? save.
3. Under Apps Select object settings.

4. Click on Items object ? click on Edit ? under Item:Record Type Assignments,enable Gold,Silver ? Object permission check for read ,edit and create.
5. Click on Save.
6. After saving the permission click on the Manage assignment
7. Now click on the Add Assignment.
8. Now select the users which you have created in user milestone, using Worker profile and click on Next ? Assign? Done.



To Create a Trigger Handler class:

CODE:

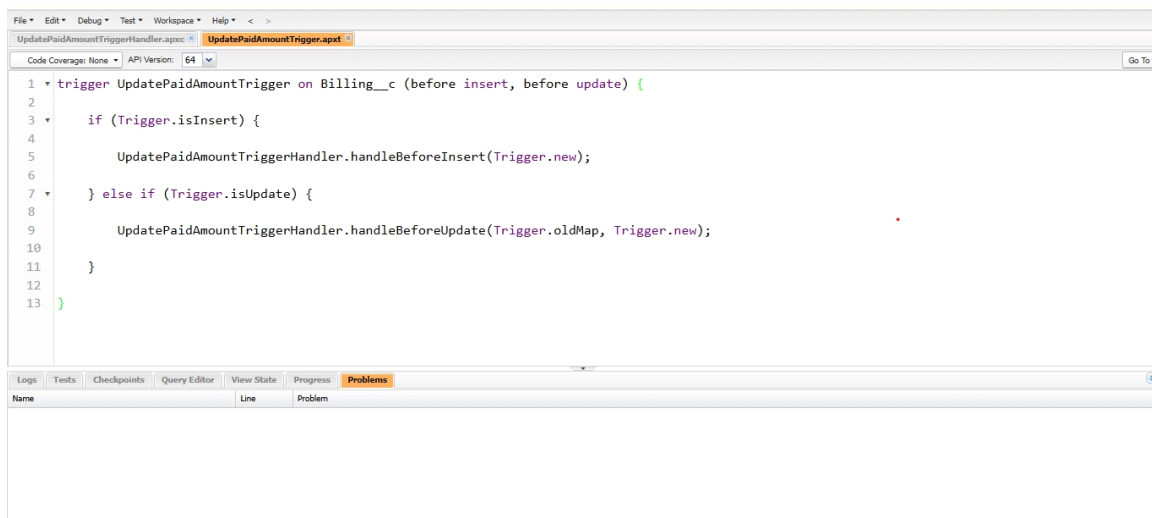
```

public class UpdatePaidAmountTriggerHandler {

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

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

```



To Create the trigger:

CODE:

```

trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {
    if (Trigger.isInsert) {

```

```

UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trieger.new);

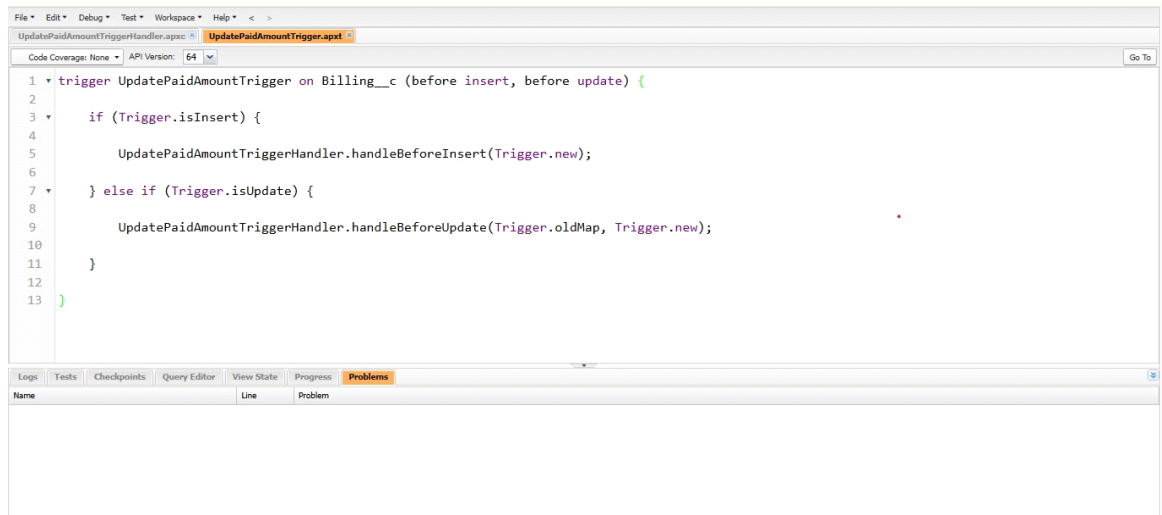
    } else if (Trieger.isUpdate) {

        UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trieger.oldMap,
Trieger.new);

    }

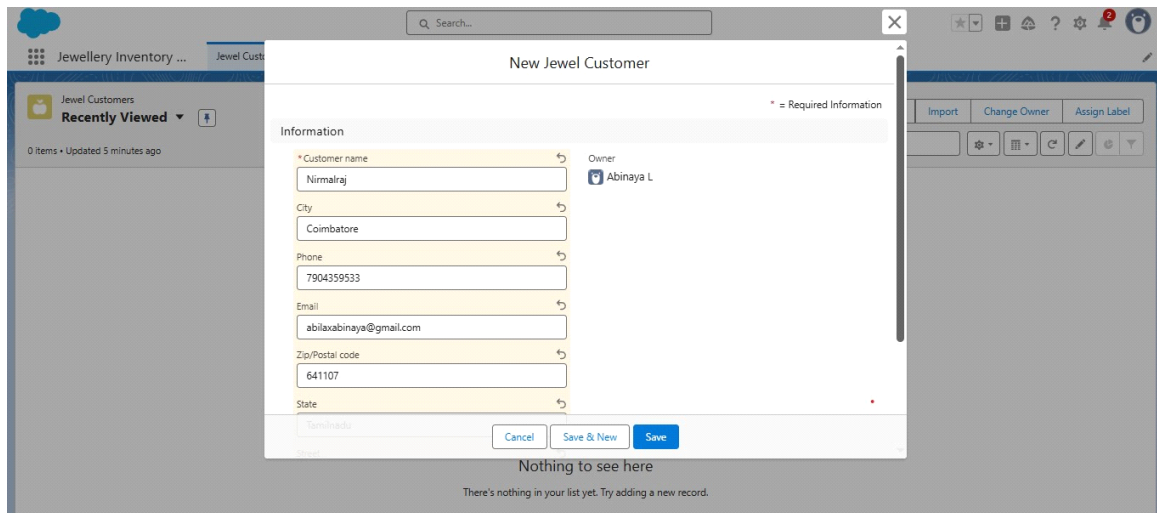
}

```



To 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.



New Jewel Customer

* = Required Information

Information

* Customer name: Nirmalraj

City: Coimbatore

Phone: 7904359533

Email: abilaxabinaya@gmail.com

Zip/Postal code: 641107

State: Tamilnadu

Owner: Abinaya L.

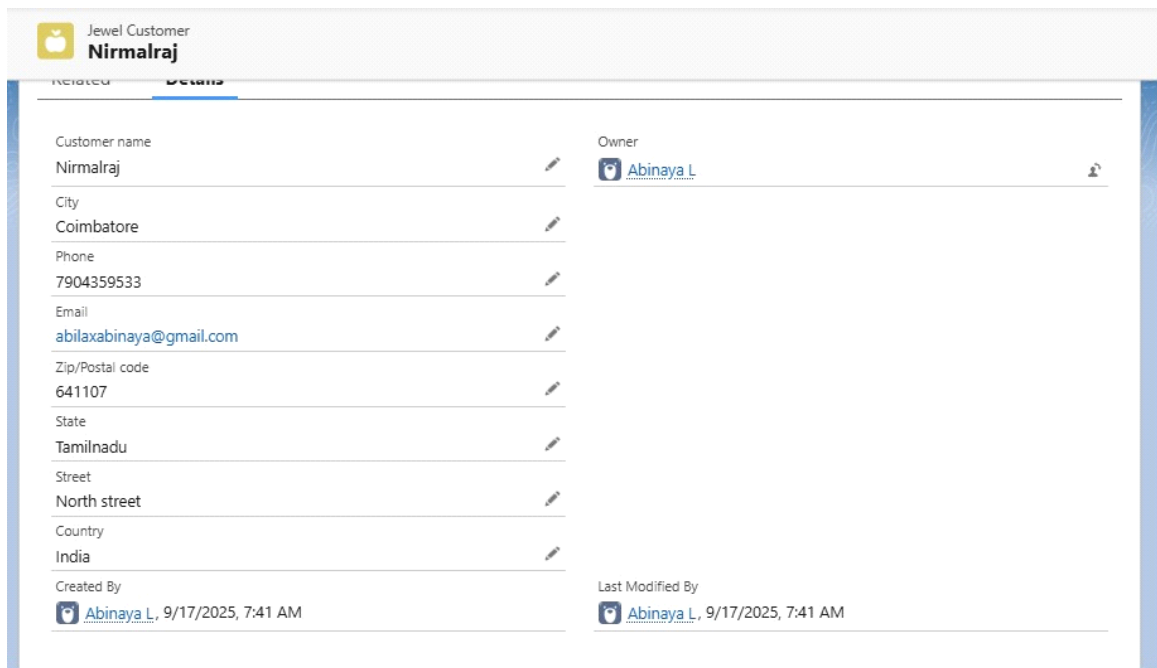
Buttons: Cancel, Save & New, Save

Nothing to see here

There's nothing in your list yet. Try adding a new record.

To 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.



Jewel Customer

Nirmalraj

Details

Customer name: Nirmalraj

City: Coimbatore

Phone: 7904359533

Email: abilaxabinaya@gmail.com

Zip/Postal code: 641107

State: Tamilnadu

Street: North street

Country: India









Owner: Abinaya L.

Created By: Abinaya L., 9/17/2025, 7:41 AM

Last Modified By: Abinaya L., 9/17/2025, 7:41 AM

To 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.

 Jewel Customers		Recently Viewed ▾ 		New Import Change Owner Assign Label	
9 Items • Updated a few seconds ago		<input type="text" value="Search this list..."/>		     	
<input type="checkbox"/> Customer name				▾	
1	<input type="checkbox"/> Nirmalraj			▾	
2	<input type="checkbox"/> Kumar			▾	
3	<input type="checkbox"/> Priya			▾	
4	<input type="checkbox"/> Arjun			▾	
5	<input type="checkbox"/> Maya			▾	
6	<input type="checkbox"/> Anu			▾	
7	<input type="checkbox"/> Pradeepa			▾	
8	<input type="checkbox"/> Ramya			▾	
9	<input type="checkbox"/> Abinaya			▾	

To create report types:

Jewellery Inventory ...

Jewel Customers

Items

Prices

Customer Orders

Billings

Reports

Dashboards

Q Search...

★

+

🔍

?

🔔

👤

REPORT

Price Report

Prices

➤

⏪

⏩

Add Chart

Save & Run

Save

Close

Run

Outline

Filters

1

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

Update Preview Automatically

Filters

Add filter...

Show Me

My prices

Price: Created Date

All Time

	Price: ID	Gold Price	Price: Price Id
1	a03gL00000CeyjJ	\$65,000	PRICE-01
2	a03gL00000Cfgrmv	\$70,000	PRICE-02
3	a03gL00000Cfgr0	\$35,000	PRICE-08
4	a03gL00000CgeN7	\$55,000	PRICE-03
5	a03gL00000CgeIg	\$25,000	PRICE-10
6	a03gL00000CgeTEL	\$95,000	PRICE-04
7	a03gL00000CggIT	-	PRICE-05
8	a03gL00000Cghkn	\$88,000	PRICE-06
9	a03gL00000Cggf8f	-	PRICE-07
10	a03gL00000CgksL	\$78,000	PRICE-09
11		\$511,000	

To create another report type:

Jewellery Inventory ...

Jewel Customers

Items

Prices

Customer Orders

Billings

Reports

Dashboards

Q Search...

★

+

🔍

?

🔔

👤

Reports

Recent

3 Items

Q Search recent reports...

New Report

New Folder

⚙

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New billing items report		Private Reports	Abinaya L	9/20/2025, 7:14 AM	📄
Created by Me	Item with Billings report		Private Reports	Abinaya L	9/19/2025, 10:59 PM	📄
Private Reports	Price Report		Private Reports	Abinaya L	9/19/2025, 9:30 AM	📄
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

To Create Dashboard:

Jewellery Inventory ...

Jewel Customers

Items

Prices

Customer Orders

Billings

Reports

Dashboards

Q Search...

★

+

🔍

?

🔔

👤

Dashboard

Dashboard 2

As of Sep 20, 2025, 7:38 AM

Viewing as Abinaya L

Refresh

Edit

Subscribe

Price Report

Price: ID

Gold Price

Price: Price Id

a03gL00000CeyjJ

\$65k

PRICE-01

a03gL00000Cfgrmv

\$70k

PRICE-02

a03gL00000Cfgr0

\$35k

PRICE-08

a03gL00000CgeN7

\$55k

PRICE-03

a03gL00000CgeIg

\$25k

PRICE-10

a03gL00000CgeTEL

\$95k

PRICE-04

a03gL00000CggIT

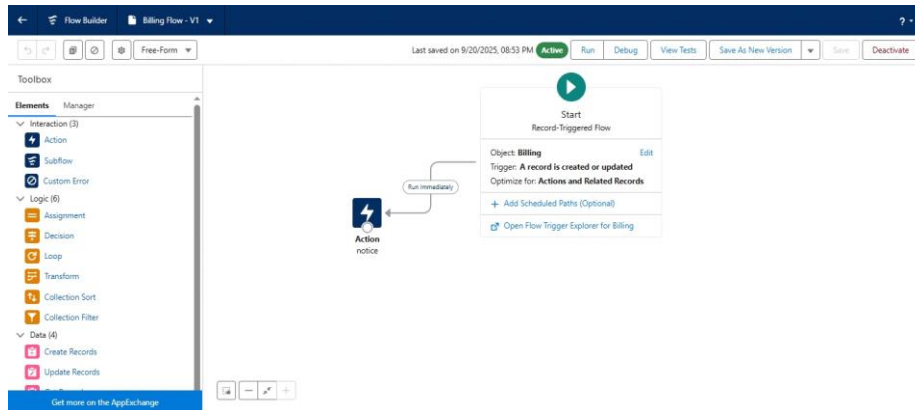
-

PRICE-05

View Report (Price Report)

As of Sep 20, 2025, 7:38 AM

To Create Flow:



Conclusion

The CRM application for jewel management provides an efficient platform for managing customer relationships, sales, billing, and inventory in the jewelry business. By automating processes, integrating customer data, and offering real-time insights, it enables developers to deliver a scalable, secure, and user-friendly solution. This system not only improves business operations but also enhances customer satisfaction, ensuring long-term growth and competitiveness in the jewelry market.

Appendix:

Create A Trigger Handler Class :

```
public class UpdatePaidAmountTriggerHandler {  
    public static void handleBeforeInsert(List<Billing c> newBillings) {  
        for (Billing c billing : newBillings) {  
            billing.Paid_Amount c = billing.Paying_Amount c;  
        }  
    }  
  
    public static void handleBeforeUpdate(Map<Id, Billing c> oldBillingsMap,  
    List<Billing c> updatedBillings) {  
        for (Billing c billing : updatedBillings) {  
            Billing c oldBilling = oldBillingsMap.get(billing.Id);  
            Decimal oldPaidAmount = oldBilling.Paid_Amount c;  
            billing.Paid_Amount c = oldPaidAmount + billing.Paying_Amount _c;  
        }  
    }  
}
```

```
}
```

```
}
```

```
}
```

Create The Trigger :

Trigger UpdatePaidAmountTrigger on Billing c (before insert, before update)

```
{
```

```
  If (Trigger.isInsert) {
```

```
    UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);
```

```
  } else if (Trigger.isUpdate) {
```

```
    UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap,  
    Trigger.new);
```

```
  }
```

```
}
```