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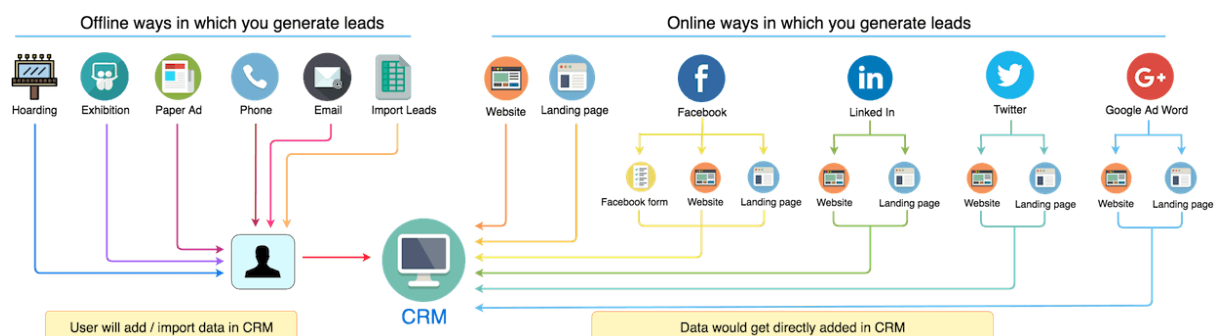
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INTRODUCTION:

1.1 Project overview:CRM Application for Jewelry Management

Project Objective:

To develop a comprehensive, cloud-based CRM application using **Salesforce** that caters specifically to the unique requirements of jewelry businesses—enhancing customer relationship management, inventory tracking, sales processes, and post-sales services.



1.2 Purpose

The purpose of this CRM application is to help jewelry businesses **manage their customers, sales, and inventory more efficiently** using Salesforce.

It is designed to:

- Keep all customer information in one place
- Track jewelry products and stock
- Make sales and follow-ups easier
- Handle repairs and after-sales service
- Improve customer service with personalized communication

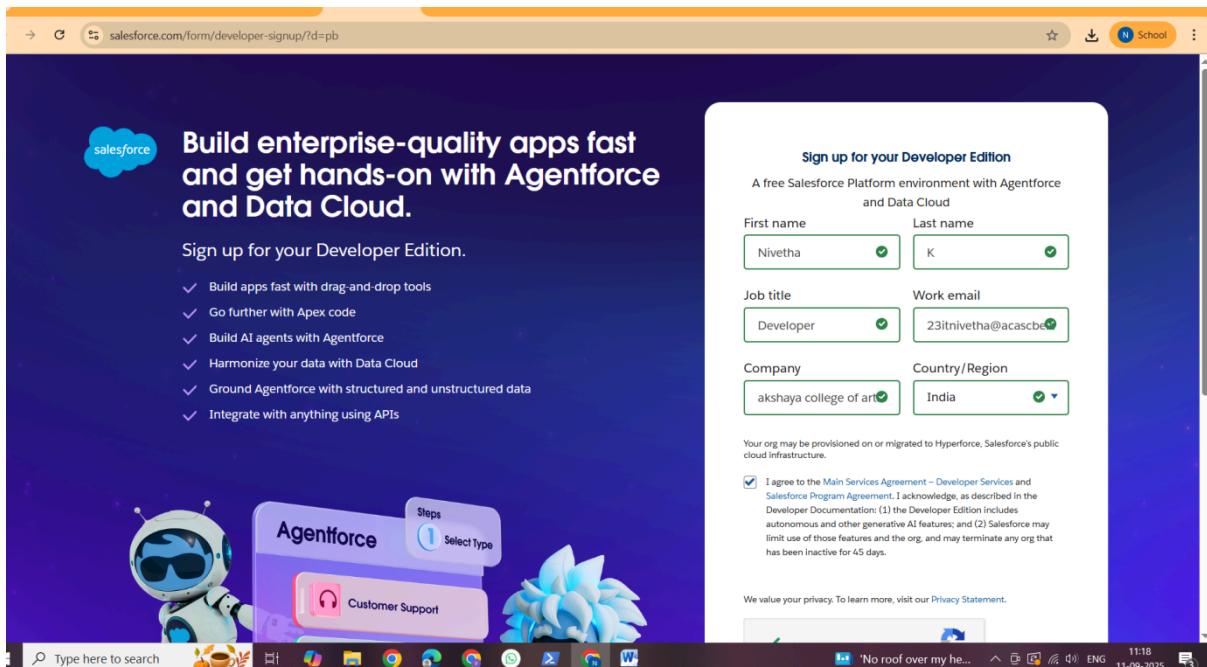
This system helps jewelry stores save time, reduce manual work, and build stronger relationships with their customers.

Development phase

Creating developer account:

By using this URL-

<https://developer.salesforce.com/signup>



The screenshot shows the Salesforce Developer Edition sign-up page. The left side features the Salesforce logo and the text "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists several benefits: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", "Ground Agentforce with structured and unstructured data", and "Integrate with anything using APIs". The right side is a form titled "Sign up for your Developer Edition" with the subtitle "A free Salesforce Platform environment with Agentforce and Data Cloud." The form fields are: First name (Nivetha), Last name (K), Job title (Developer), Work email (23itnivetha@acascbe), Company (akshaya college of art), and Country/Region (India). There is a checkbox for "I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement" which is checked. Below the form, it says "Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure." and "We value your privacy. To learn more, visit our Privacy Statement."

1.3 Creating a object:

orgfarm-72ccc81e4f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001rkyb/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Jewel Customer

Details

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules

Details

Description

API Name
Jewel_Customer__c

Custom

✓

Singular Label
Jewel Customer

Plural Label
Jewel Customers

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

Search Setup

Setup Home Object Manager

Q tabs

User Interface

Rename Tabs and Labels

Tabs

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

**SETUP
Tabs**

New Custom Object Tab

Help for this Page

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or create a new custom object now.

Object --None--

Tab Style --None--
Jewel Customer

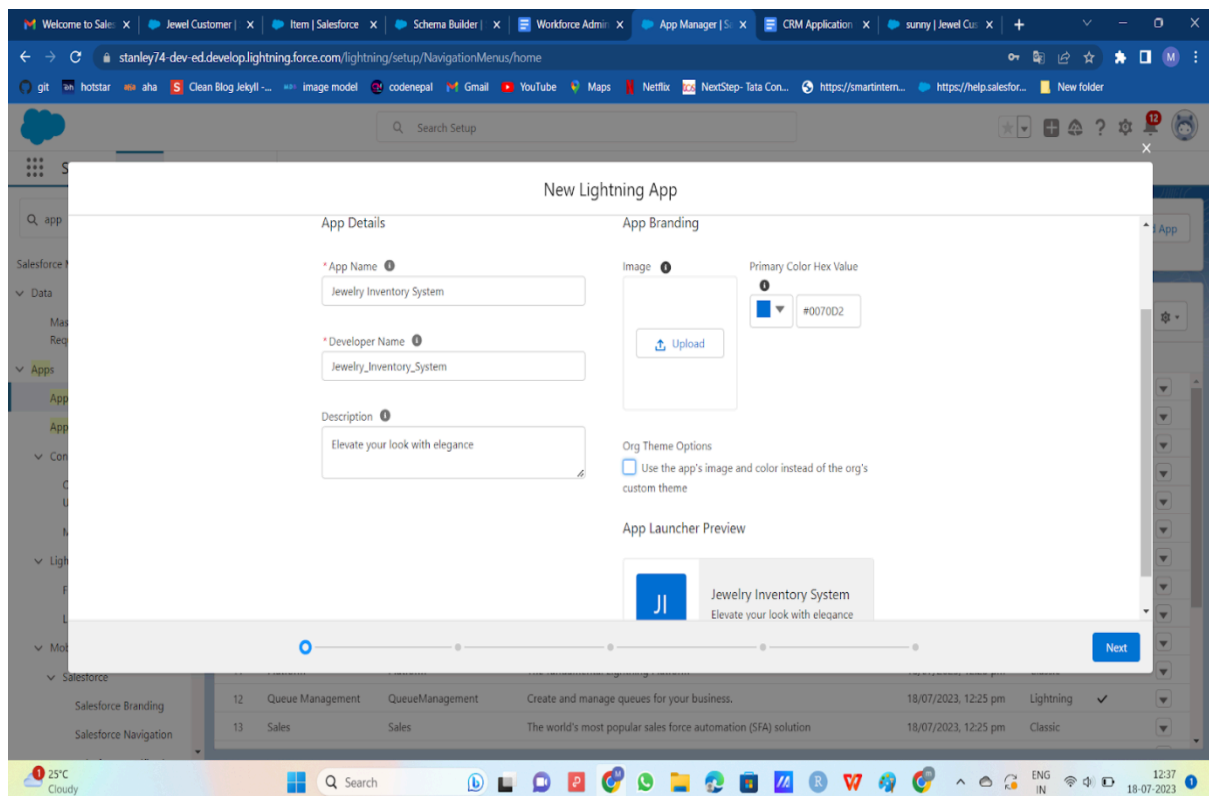
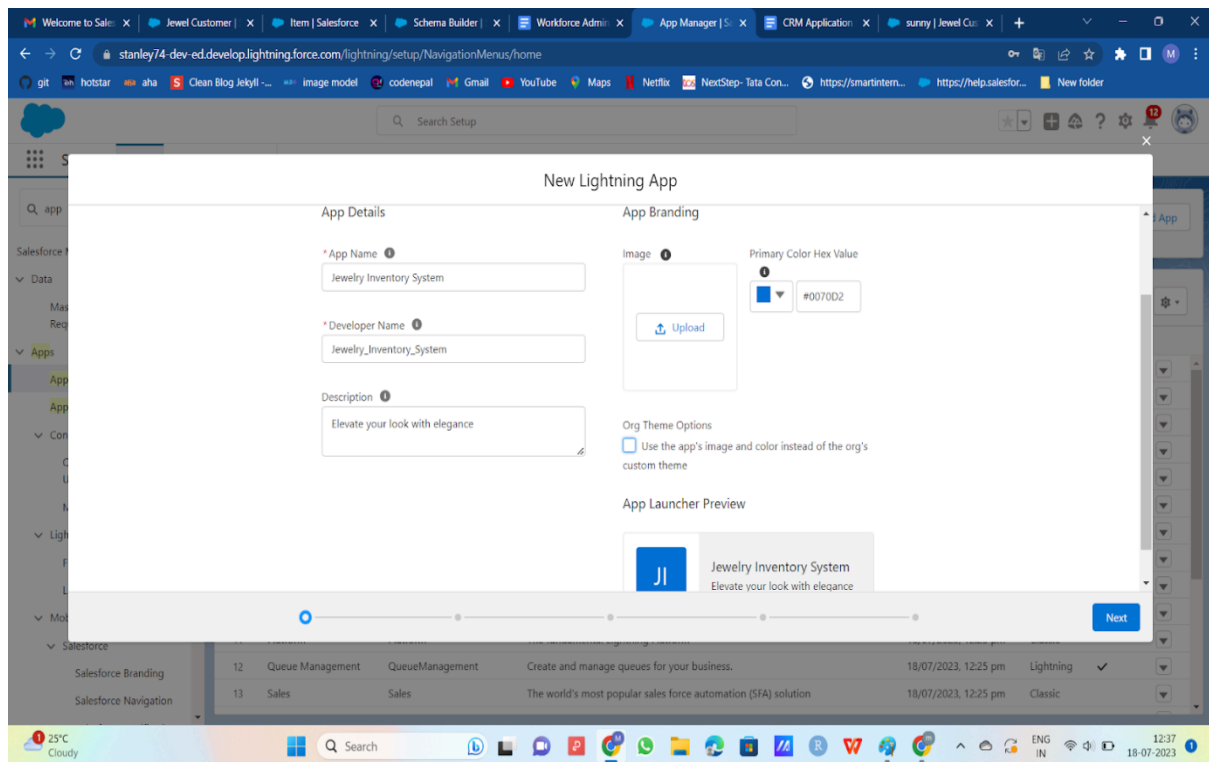
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link --None--

Enter a short description.

Description

Next Cancel



1.4 Creating the Phone field in object Jewel Customer

Setup > OBJECT MANAGER
Jeweled Customer

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

New Custom Field

Step 2. Enter the details

Field Label: Phone

Field Name: Phone

Description:

Help Text:

Required: ☒ Always require a value in this field in order to save a record

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Step 2 of 4

Previous Next Cancel

1.5 Creating the number field in Item object

Setup > OBJECT MANAGER
Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

New Custom Field

Step 2. Enter the details

Field Label: Purity

Field Name: Purity

Description:

Help Text:

Required: ☒ Always require a value in this field in order to save a record

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Length: 2

Decimal Places: 0

Number of digits to the left of the decimal point

Number of digits to the right of the decimal point

Step 2 of 4

Previous Next Cancel

1.6 Creating Picklist Field in Item Object

The screenshot shows the Salesforce Setup interface for creating a new custom field for the Item object. The left sidebar contains a navigation menu with options like 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, and Scoping Rules. The main content area is titled 'New Custom Field' and is in 'Step 2 of 4: Enter the details'. The 'Field Label' is 'Item Type'. The 'Values' section has two radio buttons: 'Use global picklist value set' (unselected) and 'Enter values, with each value separated by a new line' (selected). Below the radio buttons is a text area containing 'Gold' and 'Silver'. There are three checkboxes: 'Display values alphabetically, not in the order entered' (unchecked), 'Use first value as default value' (unchecked), and 'Restrict picklist to the values defined in the value set' (checked). The 'Field Name' is 'Item_Type' and the 'Description' field is empty.

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

Item
New Custom Field

Step 2 of 4: Enter the details

Field Label: Item Type

Values:
☐ Use global picklist value set
☒ Enter values, with each value separated by a new line

Gold
Silver

☐ Display values alphabetically, not in the order entered
☐ Use first value as default value
☒ Restrict picklist to the values defined in the value set

Field Name: Item_Type

Description:

1.7 Creating Currency Field in Price Object

The screenshot shows the Salesforce Setup interface for creating a new custom field for the Price object. The left sidebar contains a navigation menu with options like 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, and Scoping Rules. The main content area is titled 'New Custom Field' and is in 'Step 2 of 4: Enter the details'. The 'Field Label' is 'Gold price'. The 'Length' is '8' and the 'Decimal Places' is '0'. The 'Field Name' is 'Gold_price'. The 'Description' and 'Help Text' fields are empty.

Setup > OBJECT MANAGER
Price

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

Price
New Custom Field

Field Label: Gold price

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

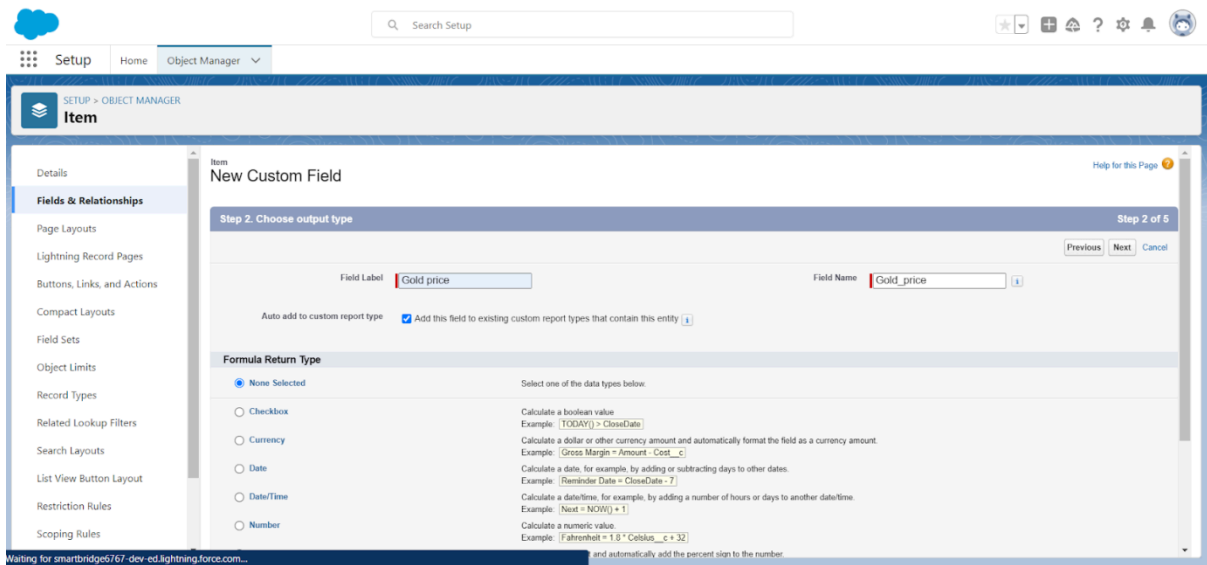
Length: 8
Decimal Places: 0

Field Name: Gold_price

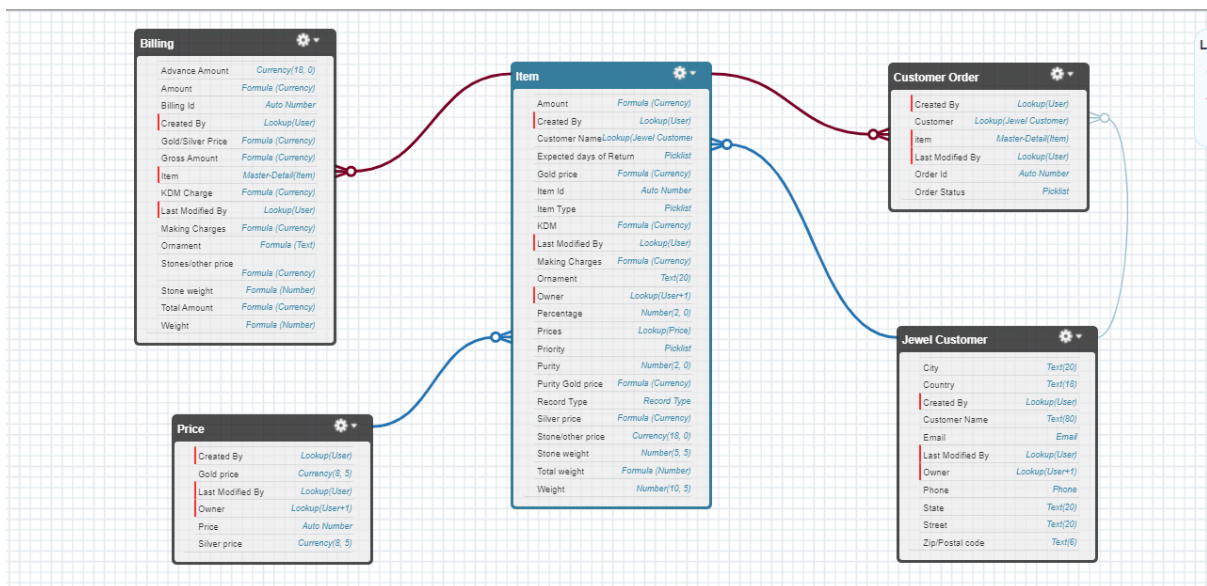
Description:

Help Text:

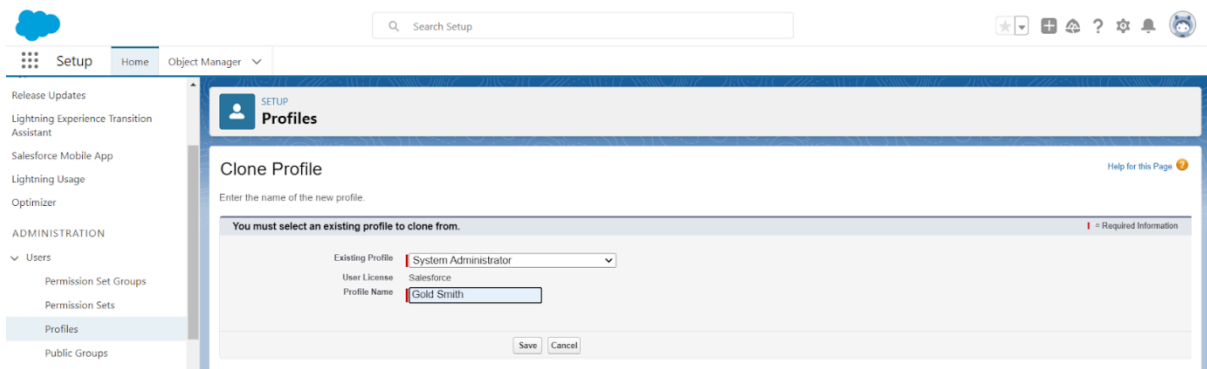
1.8 Creating Formula Field(Cross Object) in Item Object



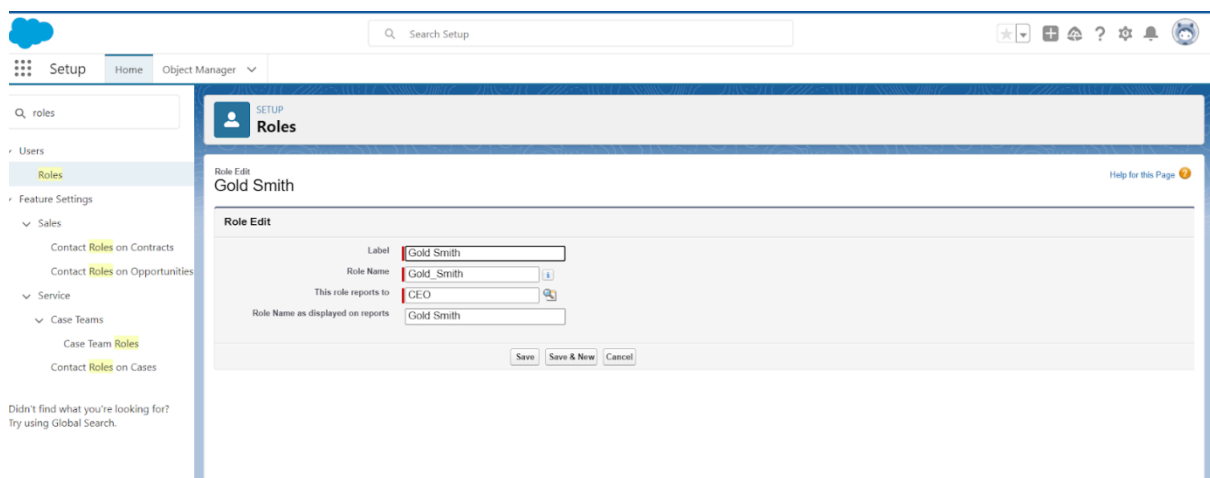
1.9 Schema Builder



2.0 Gold Smith Profile



2.1 Creating Gold Smith Role



2.2 To create a Record Type

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

Record Types

2 Items, Sorted by Record Type Label

Quick Find

New Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	Nivetha K, 8/28/2025, 1:55 AM
Silver	Gold items information	✓	Nivetha K, 8/28/2025, 2:00 AM

2.3 Creating permission set

Setup

Permission Sets

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

All Permission Sets Edit Delete Create New View

New

Action	Permission Set Name	Description	License
Clone	(Legacy) Data Cloud Data Aware Specialist	This Data Cloud permission set will be deprecated in Spring '24. Learn ...	Customer Data Platform
Clone	(Legacy) Data Cloud Marketing Admin	Allows access to Data Cloud Setup if the user is also a Salesforce admin...	Customer Data Cloud for Marketing
Clone	(Legacy) Data Cloud Marketing Manager	This Data Cloud permission set will be deprecated in Spring '24. Learn ...	Customer Data Platform
Clone	(Legacy) Data Cloud Marketing Specialist	This Data Cloud permission set will be deprecated in Spring '24. Learn ...	Customer Data Platform
Clone	(Legacy) Data Cloud for Marketing Data Aware Specialist	This Data Cloud permission set will be deprecated in Spring '24. Learn ...	Customer Data Cloud for Marketing
Clone	(Legacy) Data Cloud for Marketing Manager	This Data Cloud permission set will be deprecated in Spring '24. Learn ...	Customer Data Cloud for Marketing
Clone	(Legacy) Data Cloud for Marketing Specialist	This Data Cloud permission set will be deprecated in Spring '24. Learn ...	Customer Data Cloud for Marketing
Clone	Access Agentforce Default Agent	Gives users access to the default Agentforce agent in Salesforce.	Agentforce (Default)
Clone	Agent Platform Builder	Allow access to agent platform.	Agent platform builder
Clone	Agentforce Default Admin	Allows users to build and manage in-org copilots.	Agentforce (Default)
Clone	Agentforce Service Agent Configuration	Build and manage autonomous AI service agents.	Agentforce Service Agent Builder
Clone	Agentforce Service Agent Object Access	Access knowledge articles and manage cases and contacts as an auto...	Agentforce Service Agent User
Clone	Agentforce Service Agent Secure Base	Set up and use Agentforce Service Agent actions with enhanced data s...	Agentforce Service Agent User
Clone	Agentforce Service Agent User	Analyze topics and perform actions as an autonomous AI service agent.	Agentforce Service Agent User

2.4 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;
        }
    }

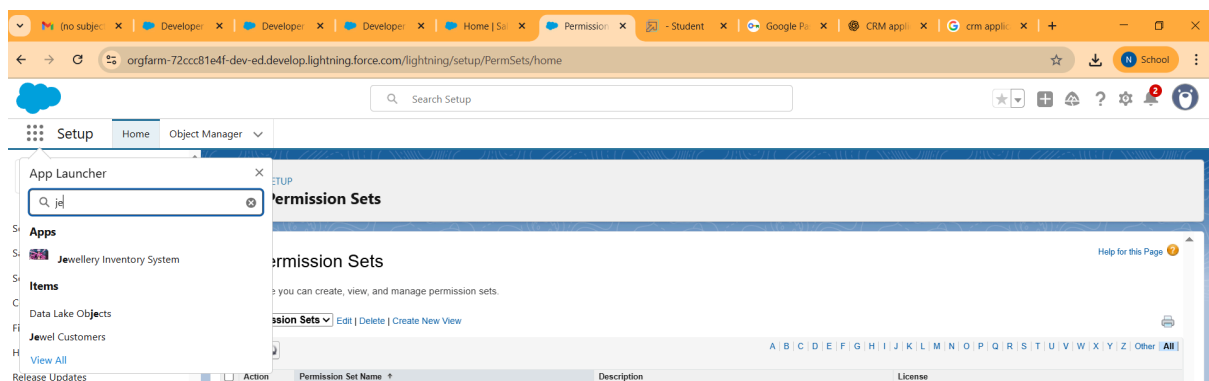
    public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap,
    List<Billing__c> updatedBillings) {
        for (Billing__c billing : updatedBillings) {
            Billing__c oldBilling = oldBillingsMap.get(billing.Id);
            Decimal oldPaidAmount = oldBilling.Paid_Amount__c;
  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

Create the trigger

CODE:

```
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);
    }
}
```

[2.5 Create a Record \(Jewel Customer\)](#)



[2.6 Create Report](#)

2.8 Create a Flow

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object

Item

Configure Trigger

* Trigger the Flow When:

☐ A record is created

☐ A record is updated

☒ A record is created or updated

☐ A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

Cancel

Done

2.9 Functional and performance testing

Functional Testing (What it does)

We checked if the CRM system works correctly:

- Can add and edit customer details
- Can manage jewelry items and check stock
- Can create and send quotations and convert to sales
- Can track repairs and warranties
- Reports and dashboards show correct data
- Automated emails and reminders are sent at the right time.

Performance Testing (How fast it works)

We tested how well the system performs:

- Loads pages quickly, even with many users
- Handles large amounts of data (customers, inventory)
- Automation and flows run smoothly without delays
- External services (like email/SMS) respond quickly.

3.0 Advantages

- **Centralized Customer Data**
All customer information is stored in one place for easy access.
- **Better Sales Tracking**
Easily manage leads, follow-ups, quotations, and sales.
- **Personalized Customer Service**
Send birthday wishes, offers, and reminders automatically.
- **Faster Service & Repairs**
Manage repairs, warranties, and after-sales service smoothly.
- **Real-Time Reports & Insights**
Get clear reports on sales, inventory, and customer trends.
- **Time-Saving Automation**
Reduce manual work with automated workflows and alerts.
- **Scalable & Cloud-Based**
Easily grow your business without worrying about infrastructure.

3.1 Disadvantages

- **High Initial Cost**
Salesforce licensing and customization can be expensive for small businesses.
- **Learning Curve**
Staff may need training to use the system effectively.
- **Customization Time**
Tailoring the system to specific jewelry business needs can take time and effort.
- **Dependency on Internet**
Being cloud-based, the system requires a stable internet connection at all times.
- **Limited Offline Access**
Most features are not available without an internet connection.
- **Integration Challenges**
Connecting with third-party apps (like POS or accounting software) may require extra development.

3.2 Conclusion

The Jewelry CRM application built on Salesforce provides an effective solution for managing customers, sales, inventory, and after-sales services in the jewelry industry. It helps businesses improve customer relationships, automate daily tasks, and make better decisions through real-time data and reports. Although there are some challenges like cost and learning curve, the overall benefits—such as improved efficiency, personalized service, and scalability—make it a valuable tool for modern jewelry businesses. This CRM system supports long-term growth and helps jewelry stores deliver a better, more professional customer experience.

Top of Form
