COLLEGE NAME: Akshaya College of Arts And Science

COLLEGE CODE: brubw

TEAM ID:

TEAM MEMBERS:

TEAM LEADER NAME: K.Nivetha

   EMAIL:23itnivetha@acascbe.edu.in

TEAM MEMBER:K.Vijayadharshini

   EMAIL:23itvijayadharshini@acascbe.edu.in

TEAM MEMBER:T.Sneha

   EMAIL:23itsneha@acascbe.edu.in

TEAM MEMBER:D.Subaharini

   EMAIL:23itsubaharini@acascbe.edu.in

**TEAM MEMBER:**T.Mahalakshmi

   EMAIL:mahalakshmit202@gmail.com

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.
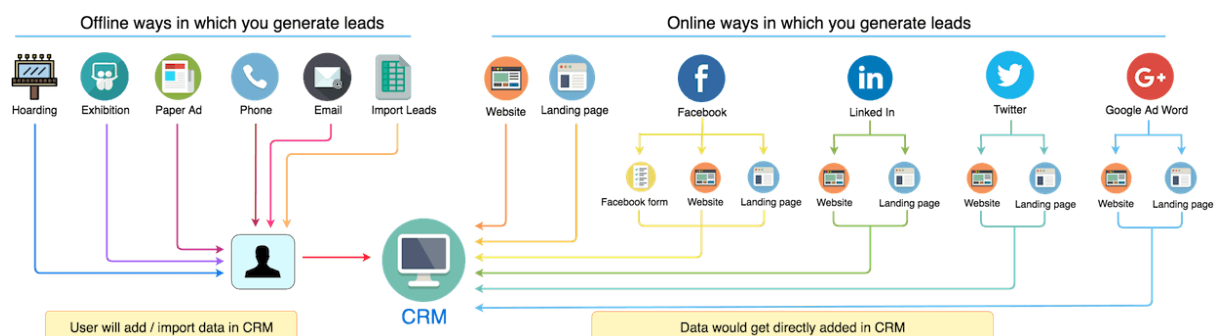
1.2 Purpose

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

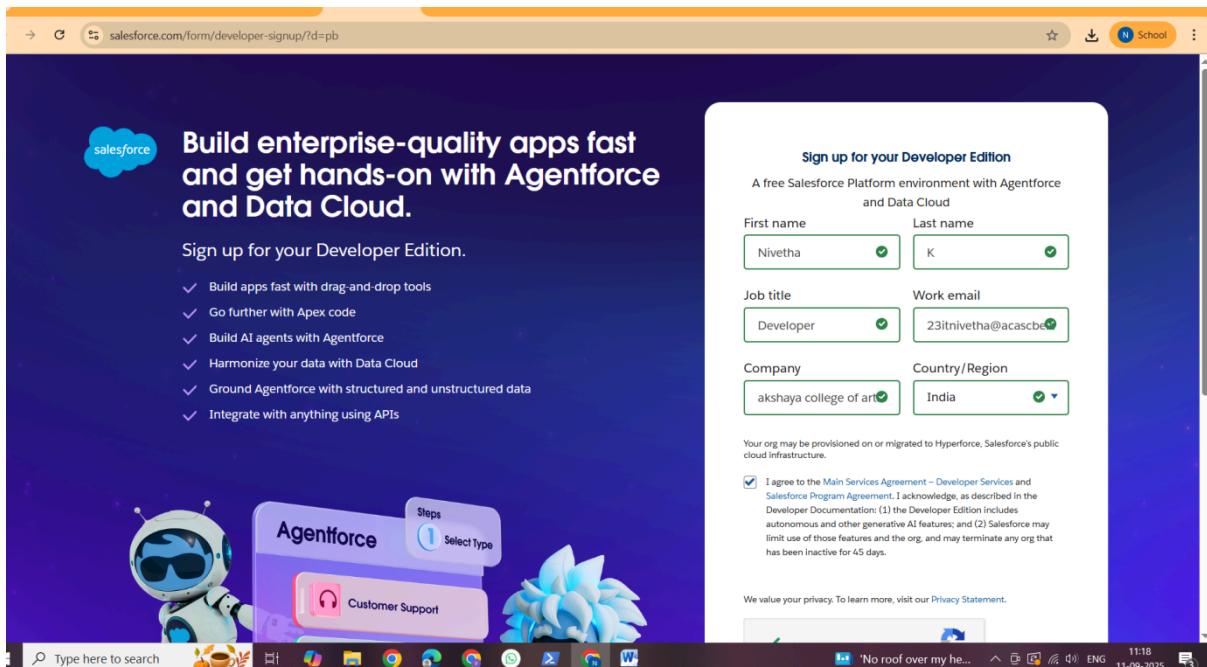- Improve customer service with personalized communication

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

1.3 Creating a object:

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.
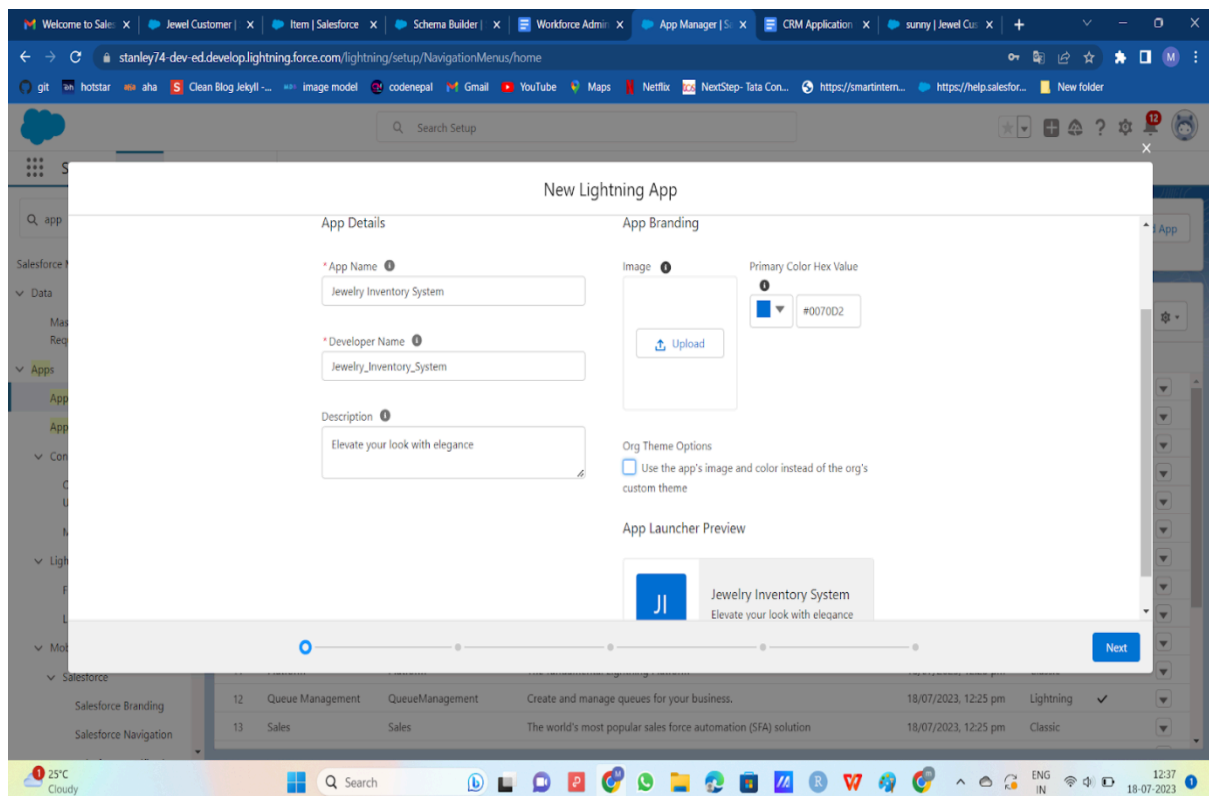
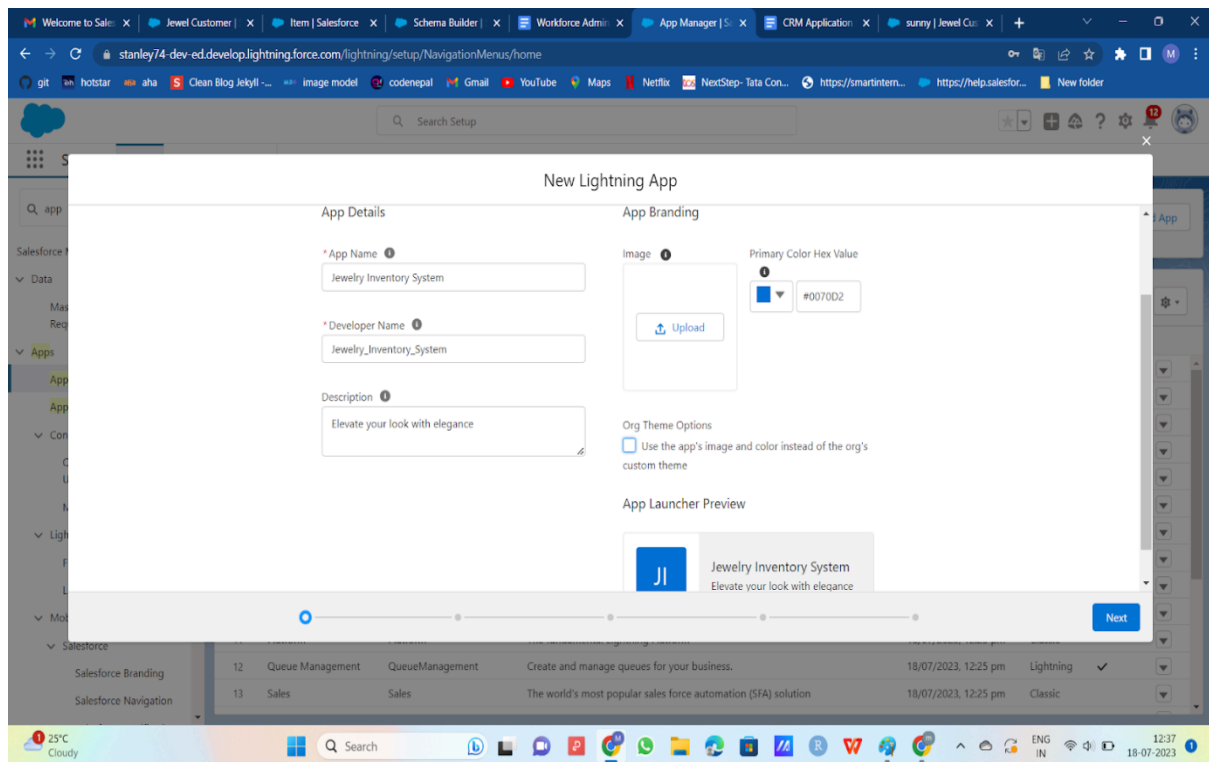| Object | --None-- |
| Tab Style | --None-- |
| | Jewel Customer |

(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

1.5 Creating the number field in Item object

1.6 Creating Picklist Field in Item Object

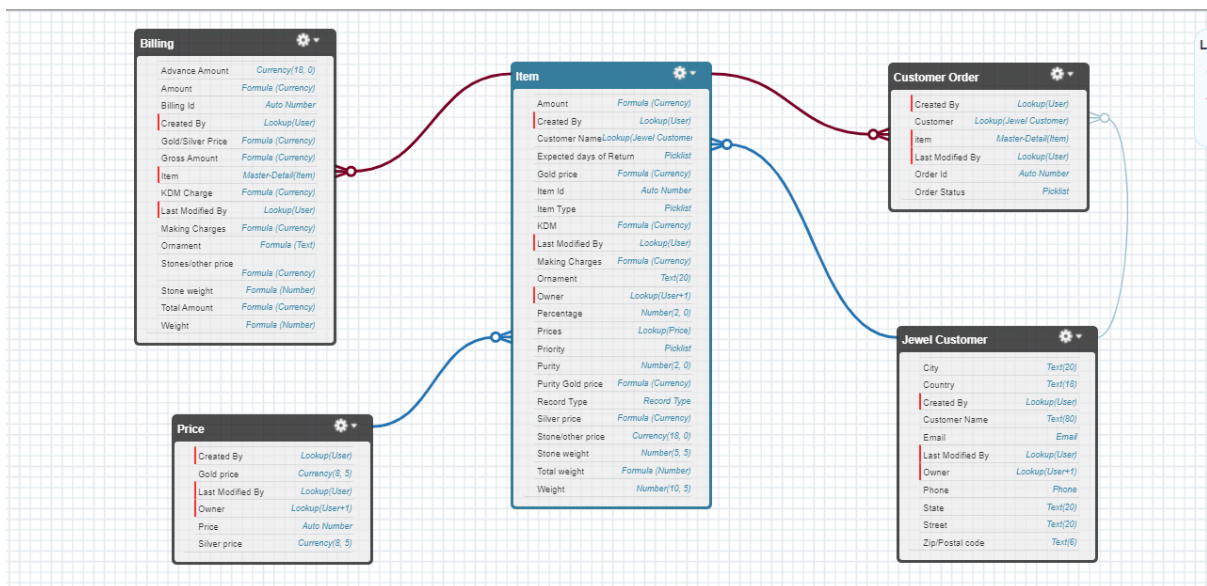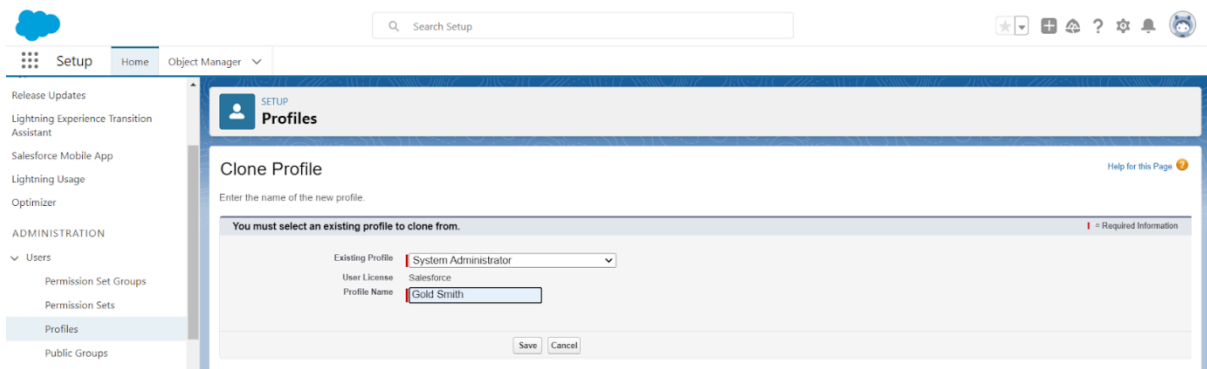## 1.7 Creating Currency Field in Price Object

1.8 Creating Formula Field(Cross Object) in Item Object
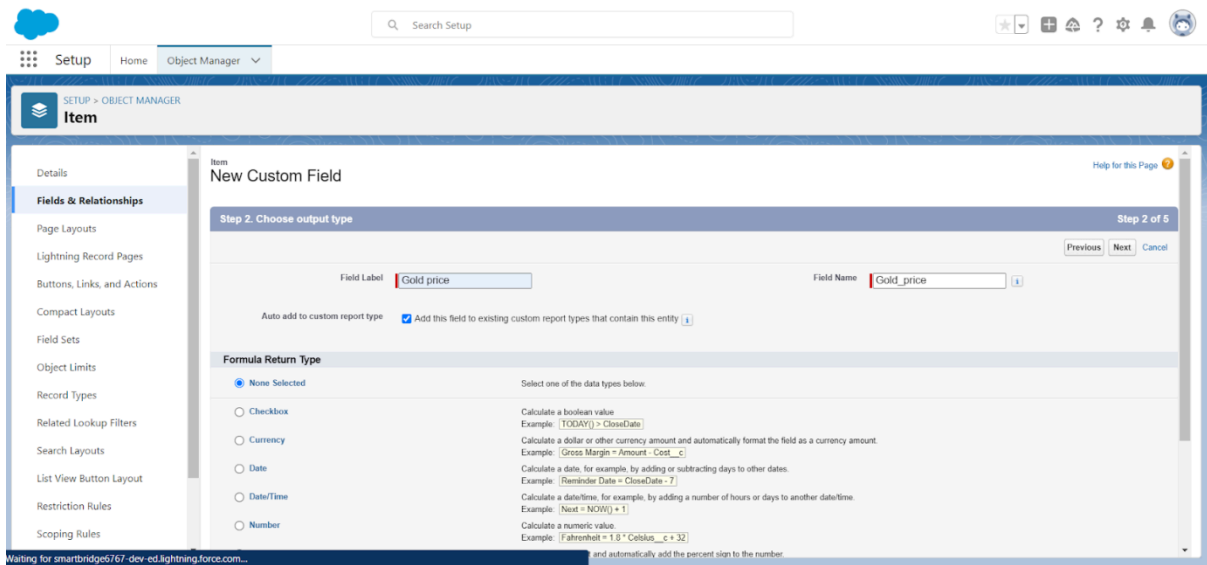
1.9 Schema Builder

2.0 Gold Smith Profile

2.1 Creating Gold Smith Role
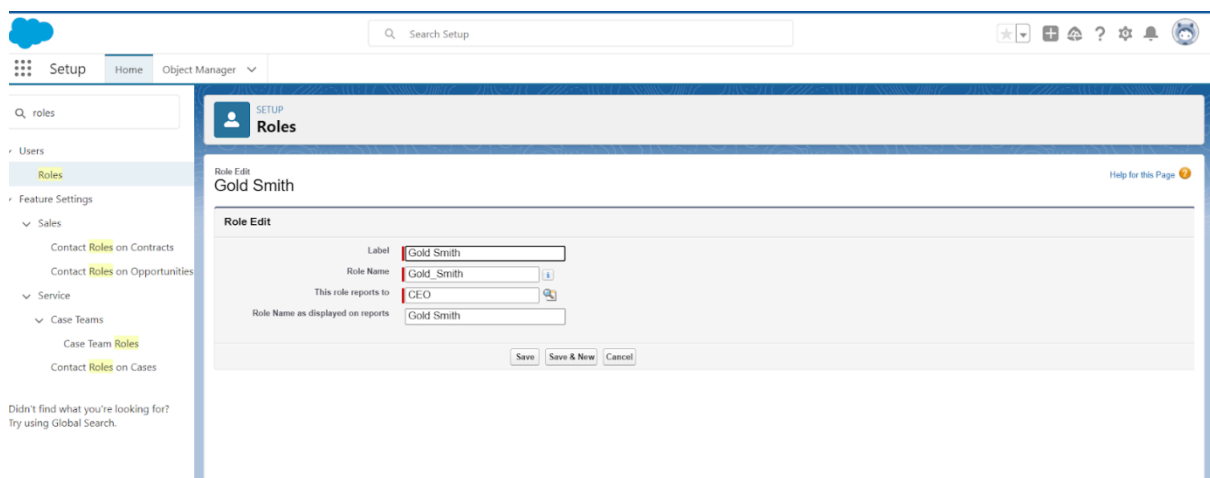
2.2 To create a Record Type

2.3 Creating permission set

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](#)

2,7 Create Dashboard

2.8 Create a Flow

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