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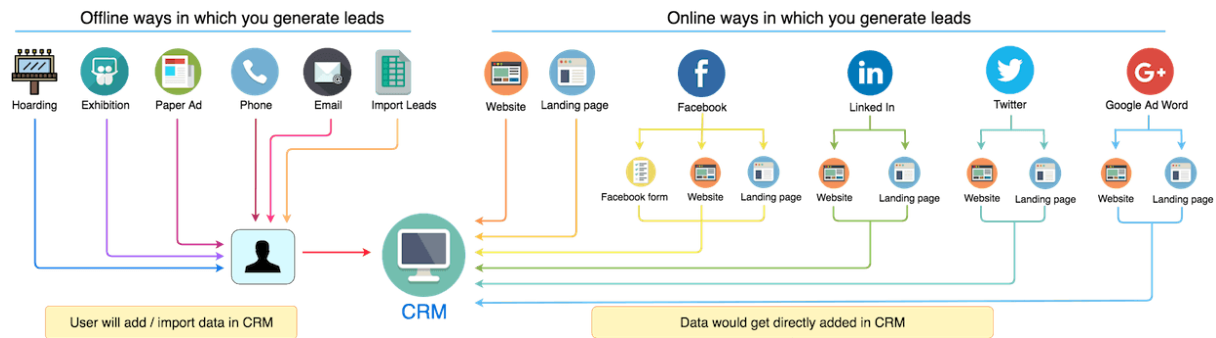
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INTRODUCTION:

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>

salesforce.com/form/developer-signup/?d=pb

Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

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First name: Nivetha ✓ Last name: K ✓

Job title: Developer ✓ Work email: 23itnivetha@acascbe ✓

Company: akshaya college of art ✓ Country/Region: India ✓

☒ 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.

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 > OBJECT MANAGER

Jewel Customer

Details

Description

API Name: Jewel_Customer__c

Custom

✓

Singular Label: Jewel Customer

Plural Label: Jewel Customers

Enable Reports: ✓

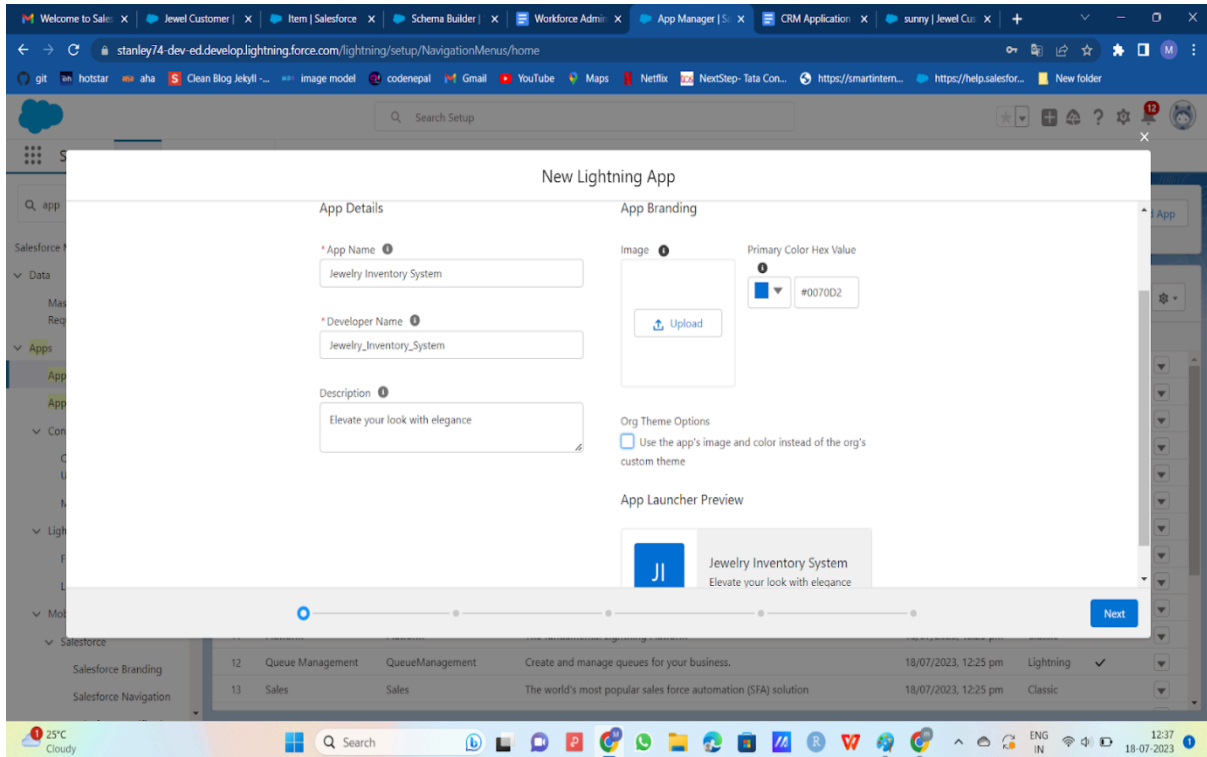
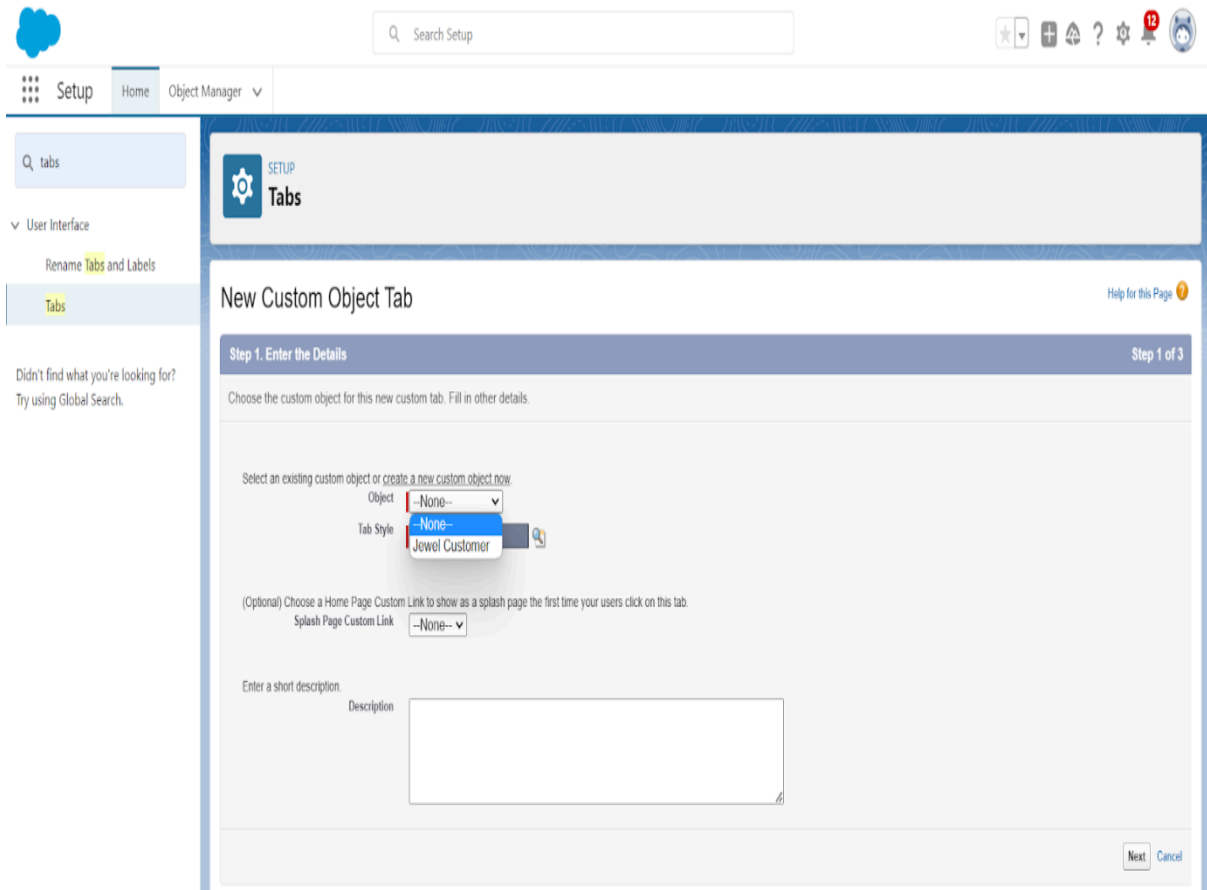
Track Activities

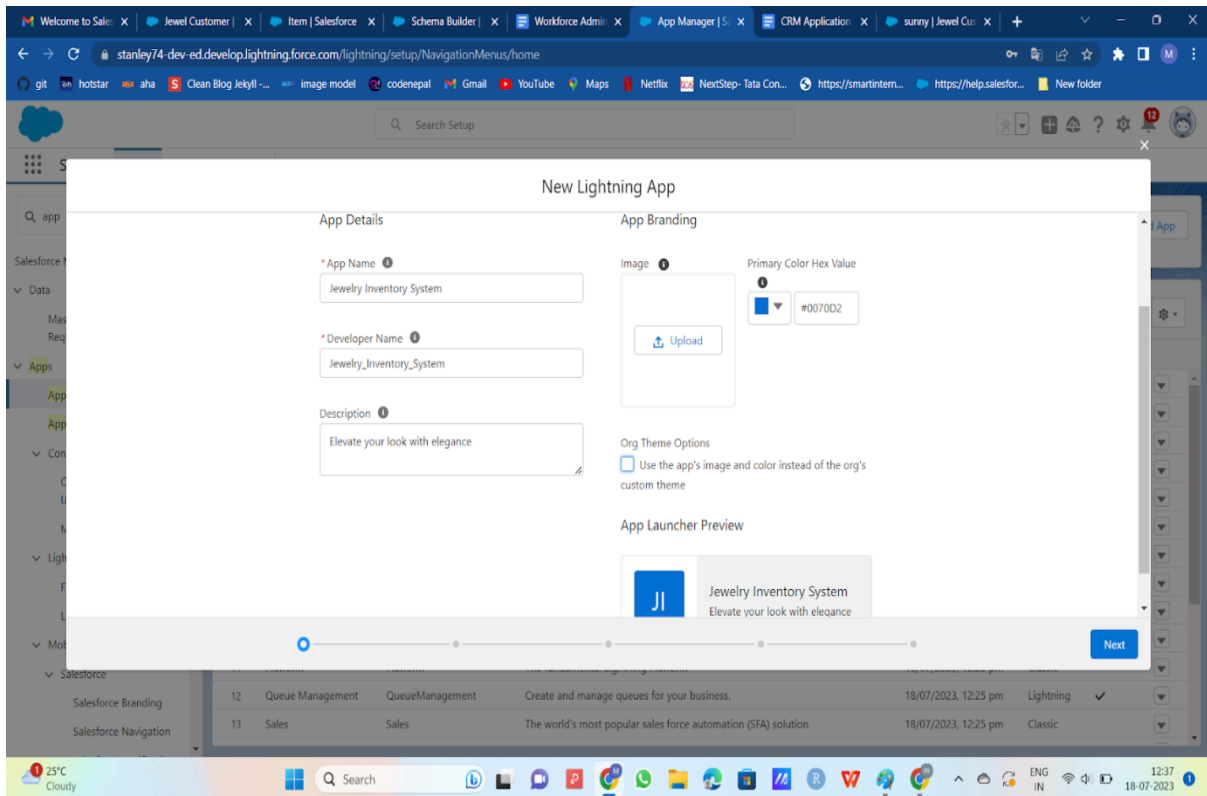
Track Field History

Deployment Status: Deployed

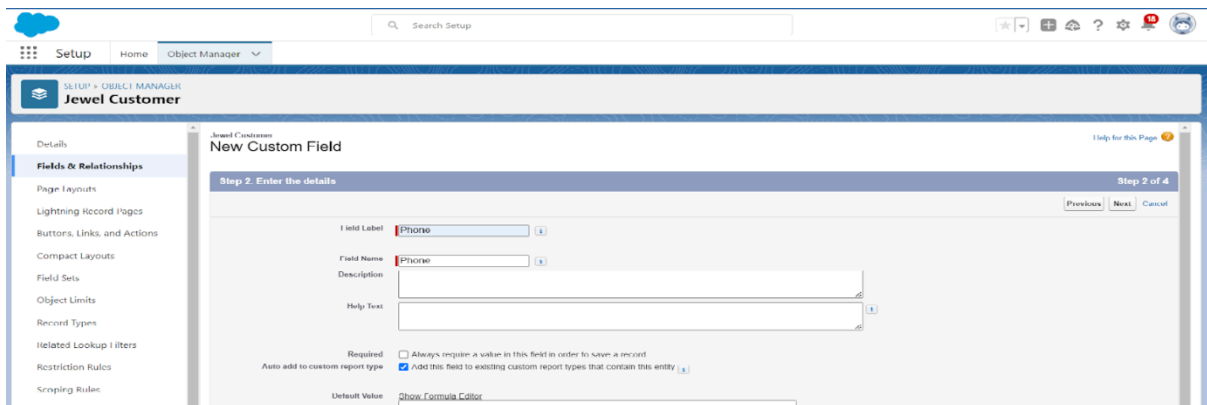
Help Settings: Standard salesforce.com Help Window

Hot days ahead






1.4 Creating the Phone field in object Jewel Customer










1.5 Creating the number field in Item object


Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Item

New Custom Field

Help for this Page

Step 2. Enter the details

Step 2 of 4

Previous

Next

Cancel

Field Label

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

Decimal Places

Field Name

Number of digits to the left of the decimal point

Number of digits to the right of the decimal point

1.6 Creating Picklist Field in Item Object

Setup

Home

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

Help for this Page

Step 2. Enter the details

PreviousNextCancel

Field LabelItem Type

Values

- Use global picklist value set
- Enter values, with each value separated by a new line

GoldSilver

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 NameItem_Type

Description

1.7 Creating Currency Field in Price Object

Setup > OBJECT MANAGER

Price

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

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
Number of digits to the left of the decimal point

Decimal Places: 0
Number of digits to the right of the decimal point

Field Name: Gold_price

Description:

Help Text:

Previous Next Cancel

1.8 Creating Formula Field(Cross Object) 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

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Item

New Custom Field

Help for this Page

Step 2. Choose output type Step 2 of 5

Field Label: Gold price

Field Name: Gold_price

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

Formula Return Type

☒ None Selected

Select one of the data types below.

☐ Checkbox
Calculate a boolean value.
Example: `TODAY() > CloseDate`

☐ Currency
Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost_c`

☐ Date
Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = CloseDate - 7`

☐ Date/Time
Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `Next = NOW() + 1`

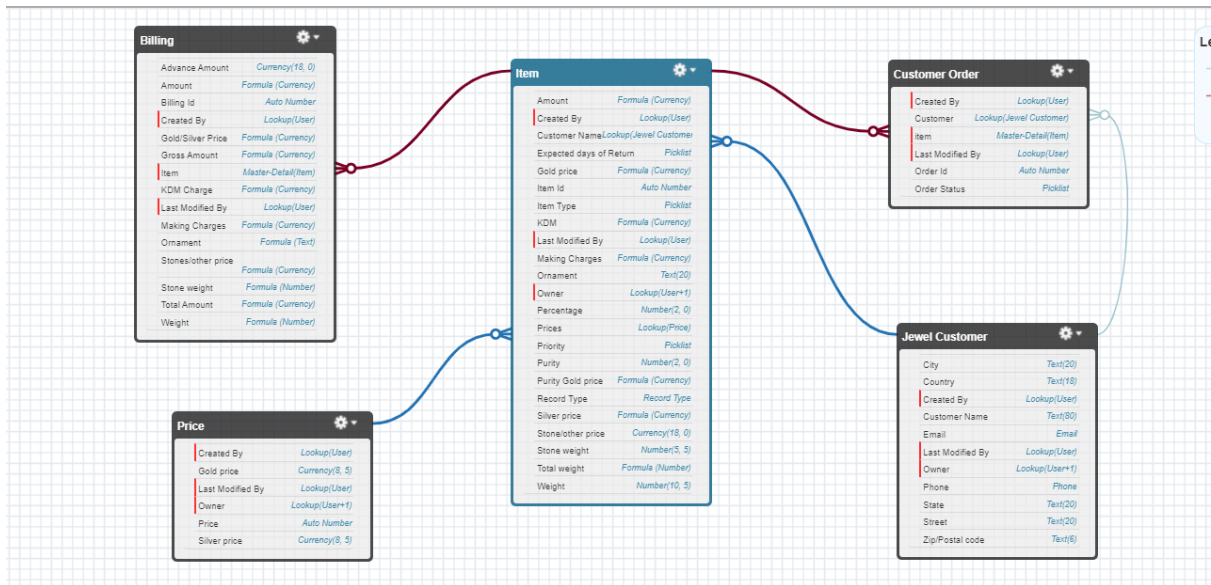
☐ Number
Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius_c + 32`

and automatically add the percent sign to the number.

Previous Next Cancel

Waiting for smartbridge6767-dev-ed.lightning.force.com...

1.9 Schema Builder



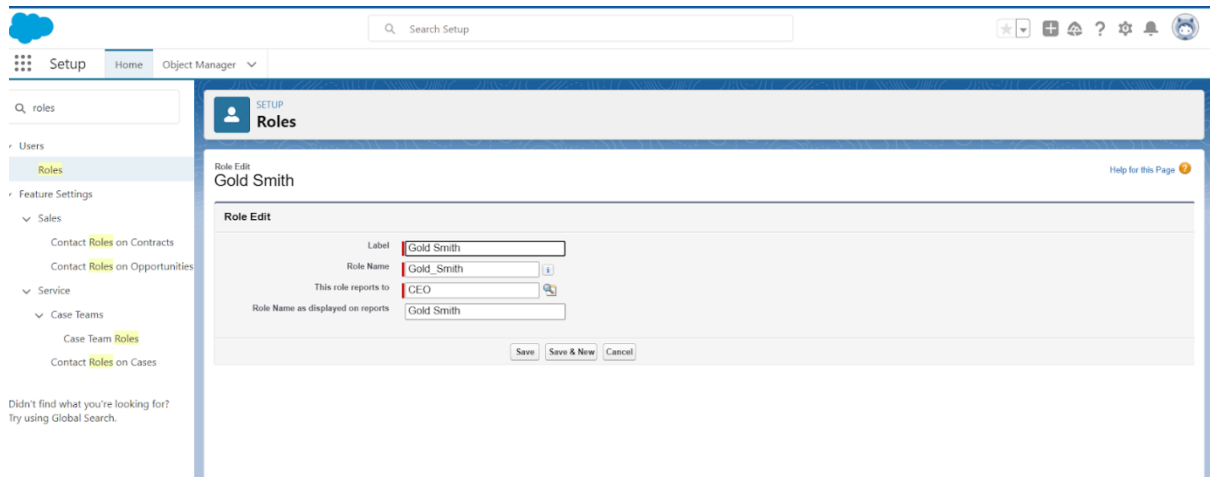
2.0 Gold Smith Profile

The screenshot shows the Salesforce Setup interface. The left sidebar contains the following navigation items:

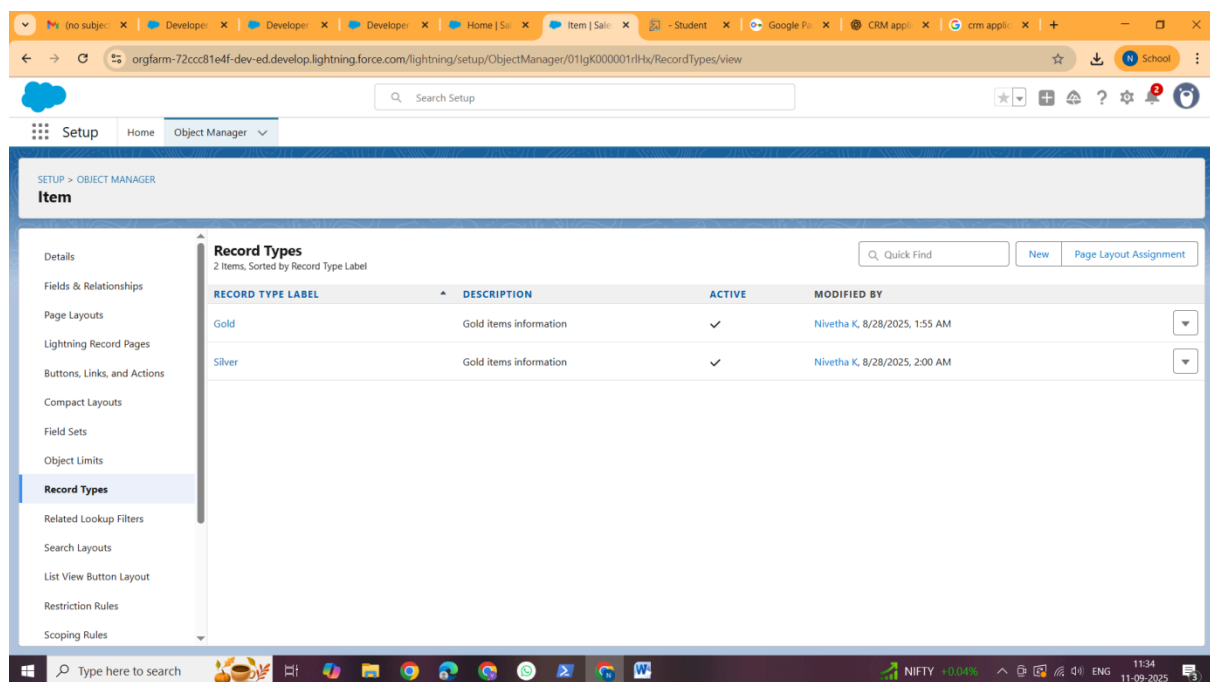
- Release Updates
- Lightning Experience Transition Assistant
- Salesforce Mobile App
- Lightning Usage
- Optimizer
- ADMINISTRATION
 - Users
 - Permission Set Groups
 - Permission Sets
 - Profiles
 - Public Groups

The main content area displays the 'Clone Profile' dialog box. The 'Existing Profile' dropdown is set to 'System Administrator'. The 'User License' is 'Salesforce' and the 'Profile Name' is 'Gold Smith'. The 'Save' and 'Cancel' buttons are at the bottom.

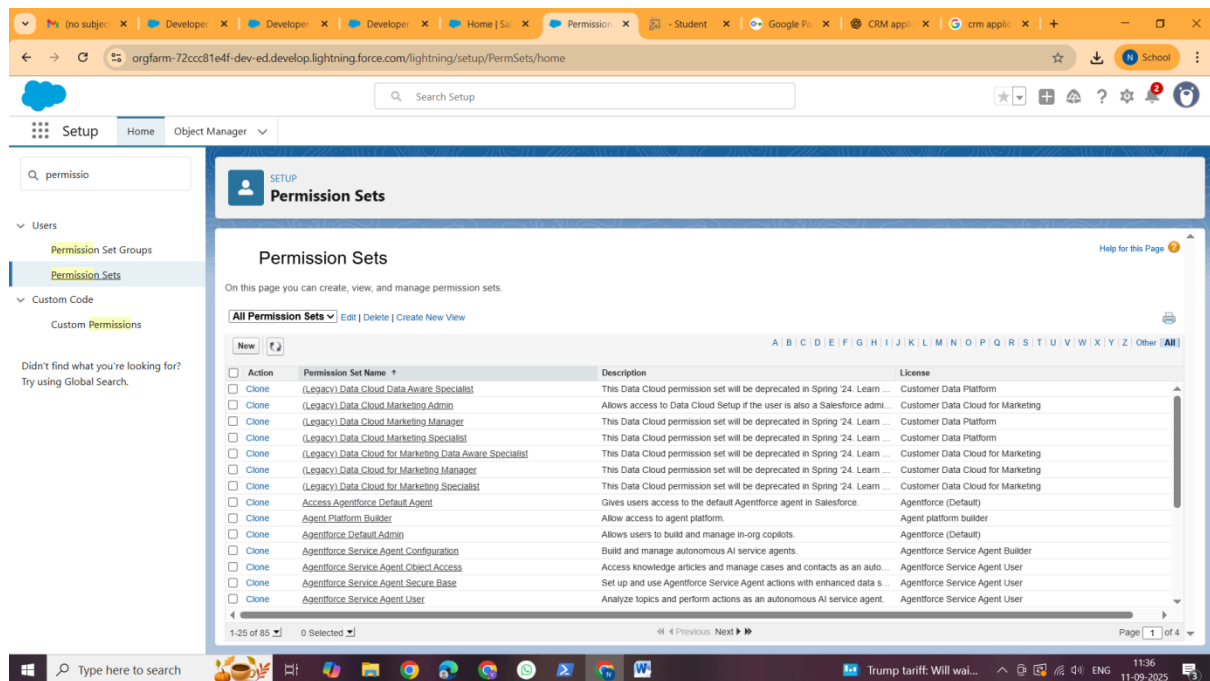
2.1 Creating Gold Smith Role



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) {

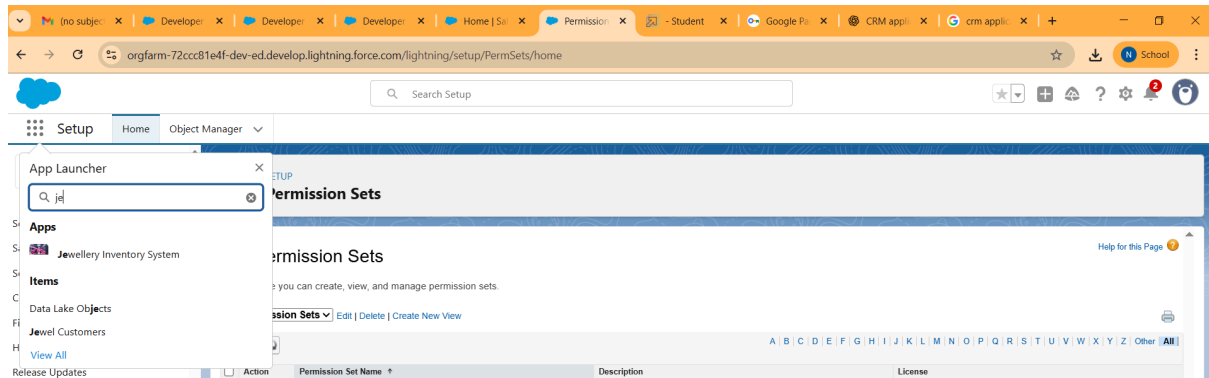
```

```

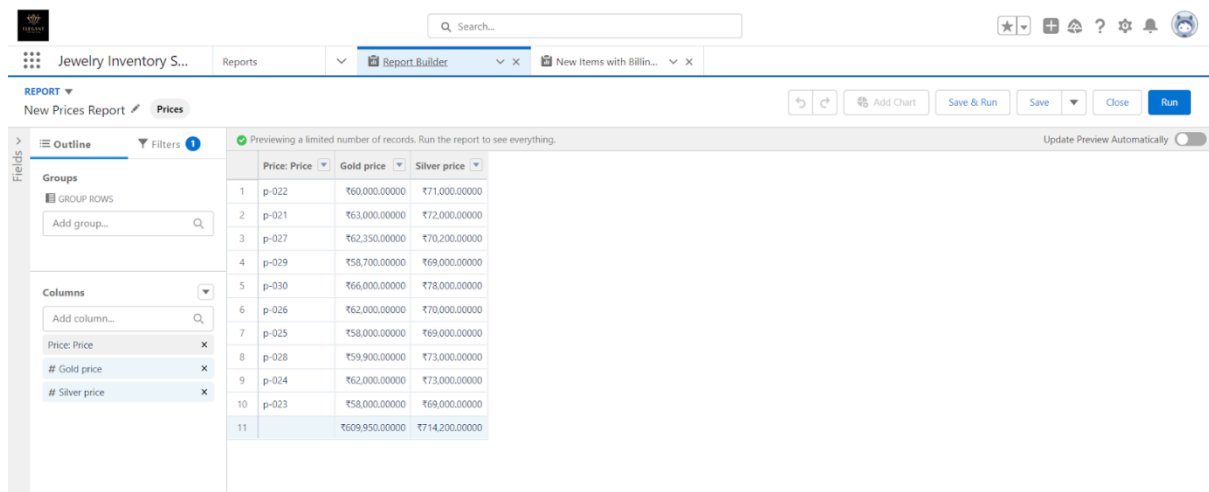
        UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap,
        Trigger.new);
    }
}

```

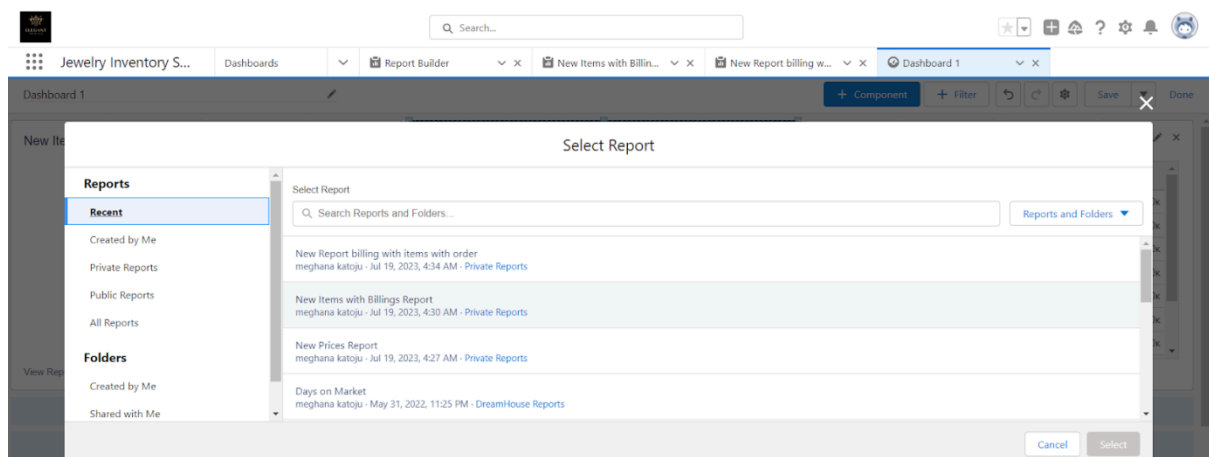
2.5 Create a Record (Jewel Customer)

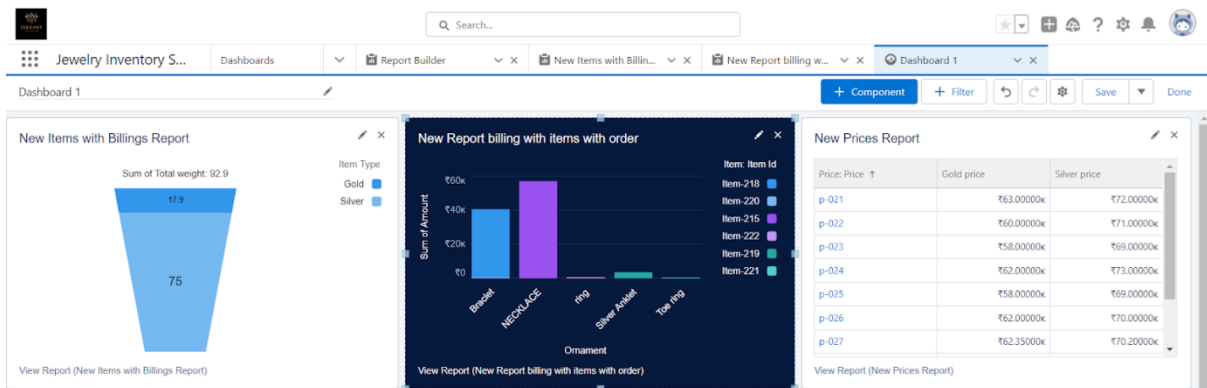


2.6 Create Report



2,7 Create Dashboard





2.8 Create a Flow

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
