

CRM Application for Jewel Management - (Developer)

College Name : Sri Vasavi College (Self Finance Wing), Erode

College Code : bru17

TEAM ID : NM2025TMID23296

TEAM MEMBERS:

Team Leader Name: PRAKASH Y

Email: prakashgentle1@gmail.com

Team Member1: RAVIKUMAR P

Email: ravisvc34@gmail.com

Team Member2: RAMAKRISHNAN S

Email: ramakrishnanrd687@gmail.com

Team Member3: VARSHINI D

Email: dhanapalvarshini@gmail.com

INTRODUCTION

Project Overview:



The Jewel Inventory System is a comprehensive software Solution designed to streamline and manage the inventory and sales processes of a jewellery store or a jewellery manufacturer.

The system aims to provide an efficient and user-friendly solution to track and control the inventory of various jewellery items, maintain accurate records, and facilitate seamless sales transactions.

Purpose:

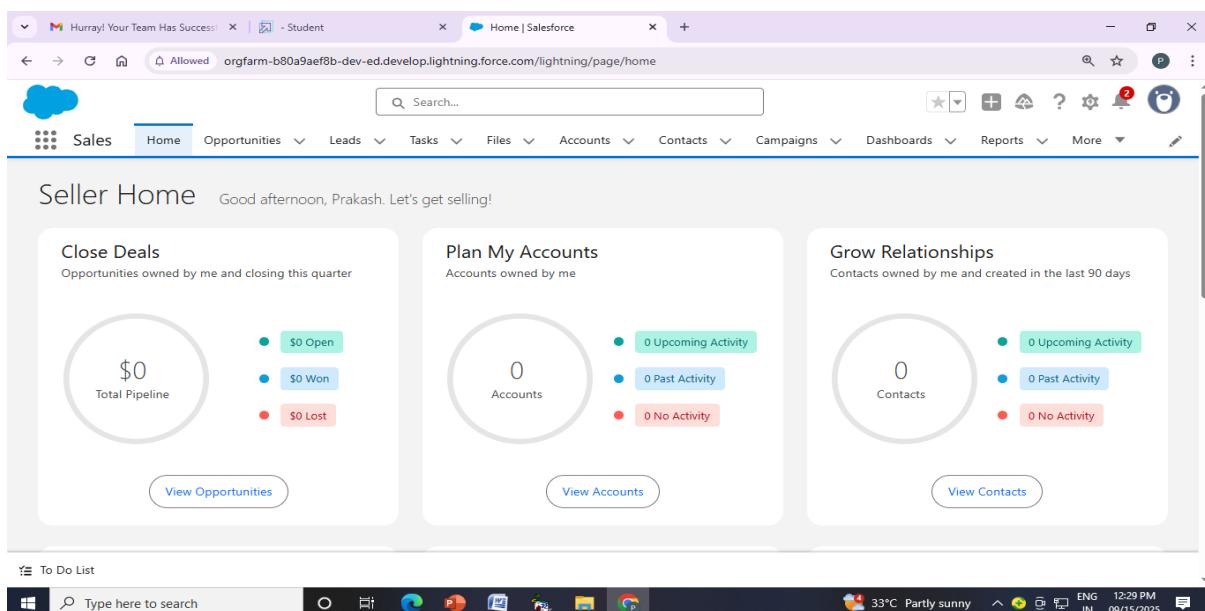
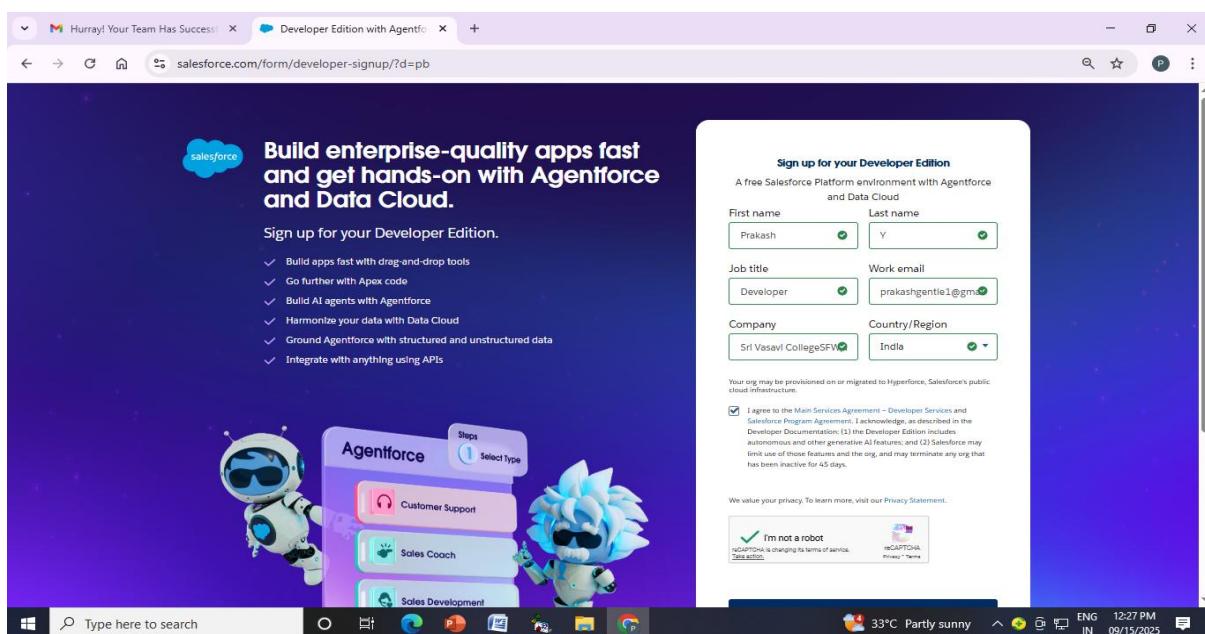
The purpose of the CRM Application for Jewel Management is to help jewelry businesses efficiently manage customer information, track sales and inventory, and improve customer relationships.

It allows for better organization, personalized services, faster communication, and data-driven decisions, ultimately increasing customer satisfaction and business growth.

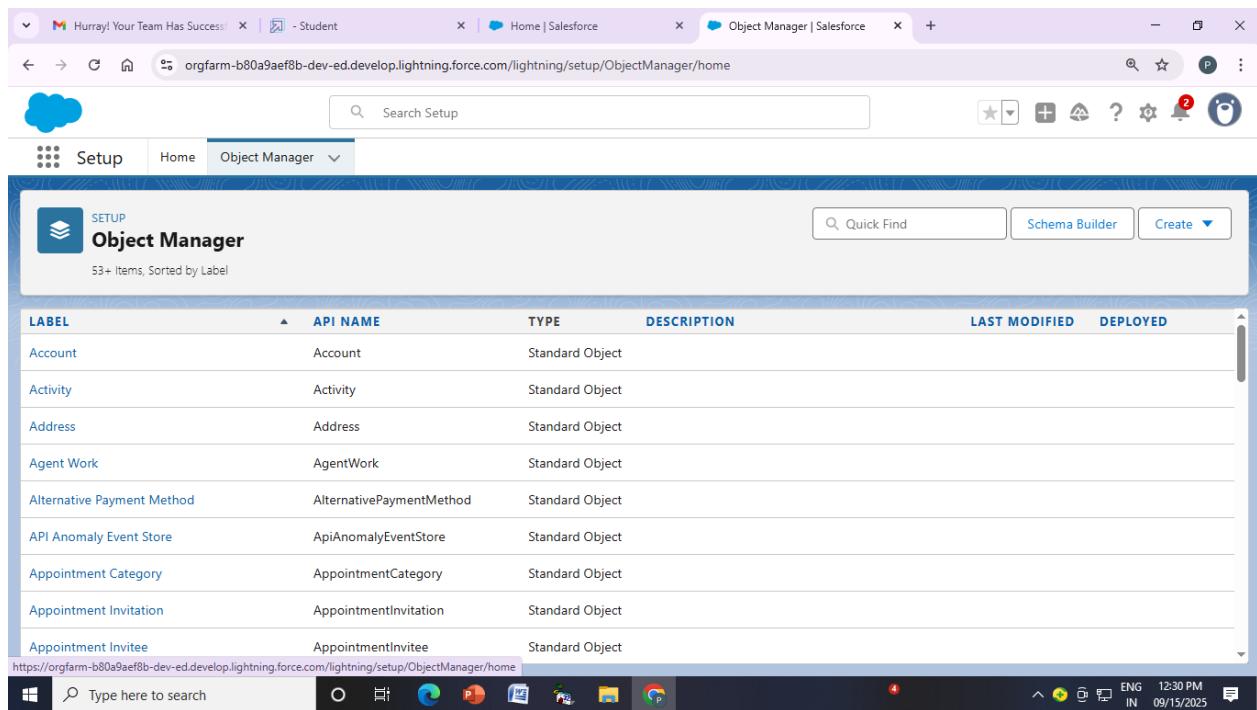
DEVELOPMENT PHASE:

Creating Developer Account:

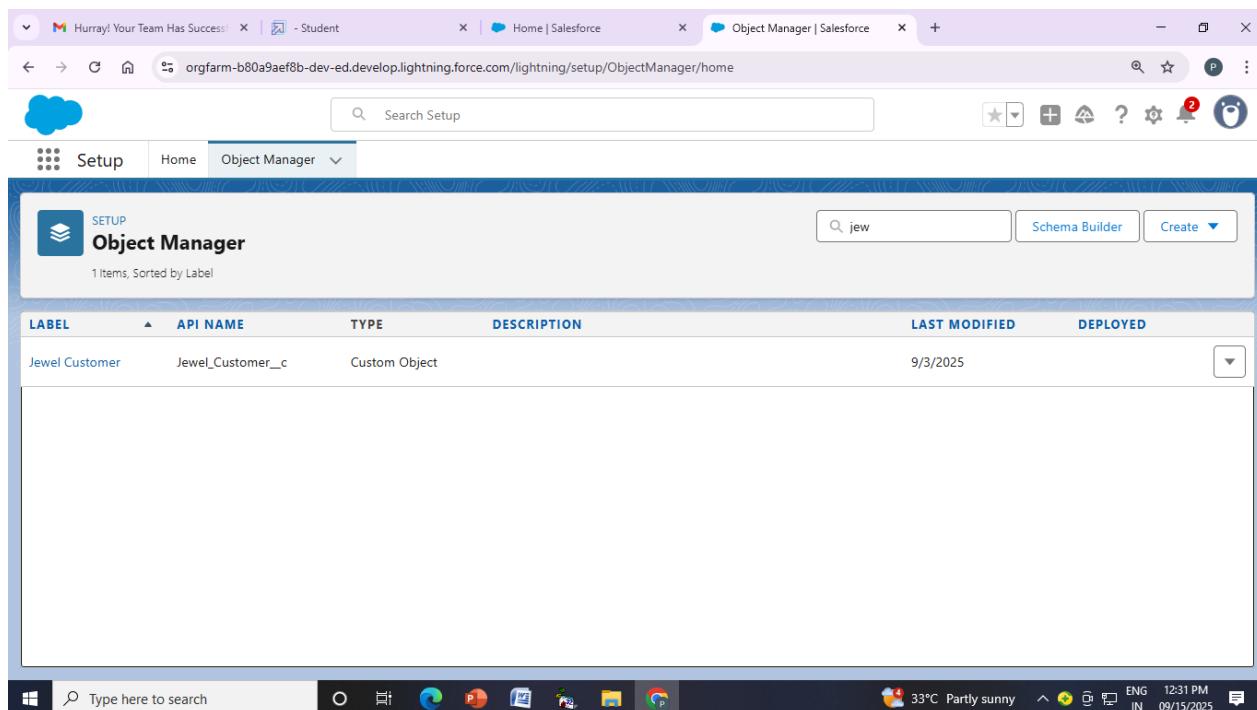
By using this URL - <https://developer.salesforce.com/signup>



Create Jewel Customer Object:



The screenshot shows the Salesforce Object Manager page. At the top, there are three tabs: 'Setup' (selected), 'Home', and 'Object Manager'. Below the tabs is a search bar with the placeholder 'Search Setup'. To the right of the search bar are several icons: a star, a plus sign, a gear, a question mark, a help icon, a bell, and a user profile. A red notification badge with the number '2' is visible on the bell icon. The main content area is titled 'Object Manager' and displays a table of objects. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The 'LAST MODIFIED' column is currently sorted in descending order. The table lists 53+ items, sorted by Label. The objects listed include Account, Activity, Address, Agent Work, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, and Appointment Invitee. The 'API NAME' column shows the standard names like 'Account', 'Activity', etc. The 'TYPE' column indicates they are all 'Standard Object'. The 'DESCRIPTION' column contains brief descriptions. The 'LAST MODIFIED' column shows the last update date. The 'DEPLOYED' column shows deployment status. The bottom of the screen shows the Windows taskbar with various pinned icons and the system tray.



The screenshot shows the Salesforce Object Manager page with a search filter applied. The search bar at the top right contains the text 'jew'. The main content area is titled 'Object Manager' and displays a table of objects. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The 'LAST MODIFIED' column is currently sorted in descending order. The table lists 1 item, sorted by Label. The object listed is 'Jewel Customer' with the API name 'Jewel_Customer__c'. The 'TYPE' column indicates it is a 'Custom Object'. The 'DESCRIPTION' column is empty. The 'LAST MODIFIED' column shows the last update date as 9/3/2025. The 'DEPLOYED' column shows deployment status. The bottom of the screen shows the Windows taskbar with various pinned icons and the system tray.

Creating an Item object is to manage the inventory of gold and silver items.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The main panel displays the 'Details' section for the 'Item' object. The 'API Name' field is set to 'Item__c'. Other details include 'Custom' type, 'Item' singular label, and 'Items' plural label. The sidebar on the left lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager', along with a search bar and standard browser controls.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The main panel displays the 'Details' section for the 'Customer Order' object. The 'API Name' field is set to 'Customer_Order__c'. Other details include 'Custom' type, 'Customer Order' singular label, and 'Customer Orders' plural label. The sidebar on the left lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager', along with a search bar and standard browser controls.

The screenshot shows the Salesforce Object Manager interface for the 'Billing' object. The left sidebar lists various setup options like Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main 'Details' tab is selected, showing fields such as API Name (Billing__c), Singular Label (Billing), and Plural Label (Billings). On the right, there are sections for Description, Enable Reports, Track Activities, Track Field History, Deployment Status (In Development), and Help Settings. A note at the bottom points to the Standard salesforce.com Help Window.

Creating a Custom Tab for an Item, Customer orders, Billing objects:

The screenshot shows the Salesforce Tabs setup page. The left sidebar has a search bar with 'tabs' typed in, followed by sections for User Interface, Rename Tabs and Labels, and a 'Tabs' section which is currently selected. Below this, a note says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. It explains that custom tabs can extend Salesforce functionality or build new applications. A table titled 'Custom Object Tabs' lists existing tabs for the Billing object, including 'IP Phone' (purple), 'Books' (blue), 'Heart' (orange), 'Jewel' (green), and 'Guitar' (red). Each row has 'Edit | Del' actions and a preview image of the tab's content.

Action	Label	Tab Style	Description
Edit Del	Billing	IP Phone	
Edit Del	DOC-20250913-WA0006.docx_2...	Books	
Edit Del	Item	Heart	
Edit Del	Jewel	Jewel	
Edit Del	Guitar	Guitar	

Create a Lightning App :

Jewellery Inventory System :

The screenshot shows the "Lightning Experience App Manager" interface. On the left, there is a sidebar with a search bar and a list of categories: "Salesforce Mobile App", "Data", "Apps" (which is selected), "Connected Apps", and "External Client Apps". Under "Apps", several items are listed: "App Manager" (selected), "AppExchange Marketplace", "Connected Apps OAuth Usage", "Manage Connected Apps", and "External Client Apps". The main area displays a table titled "Lightning Experience App Manager" with 27 items. The columns are: App Name, Developer, Description, Last Modified, App Type, and Visibility. The table includes rows for "All Tabs", "Analytics Studio", "App Launcher", "Approvals", "Automation", "Bolt Solutions", "Community", "Content", and "Data Cloud".

The screenshot shows the "Lightning App Builder" interface for the "Jewellery Inventory System". The top navigation bar includes tabs for "Lightning App Builder", "App Settings", "Pages", and "Jewellery Inventory System". The left sidebar has sections for "App Options", "Utility Items (Desktop Only)", "Navigation Items", "Navigation Rules", and "User Profiles". The main content area is divided into two sections: "App Details & Branding" and "App Launcher Preview". In "App Details & Branding", there are fields for "App Name" (Jewellery Inventory System), "Developer Name" (Jewellery_Inventory_System), "Image" (a placeholder box with an "Upload" button), "Primary Color Hex Value" (#0070D2), and a "Description" box containing the text "Elevate your look with elegance". There is also an "Org Theme Options" checkbox and a note about using the app's image and color instead of the org's custom theme. In the "App Launcher Preview" section, there is a preview card with the app icon (a blue square with "JI"), the app name "Jewellery Inventory System", and the description "Elevate your look with elegance".

Create a relationship between Jewel Customer & Customer Order Objects:

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays a 'Custom Field Definition Detail' for a field named 'Customer Order'. The field's properties are as follows:

Field Label	Customer Order	Object Name	Jewel Customer
Field Name	Customer_Order	Data Type	Lookup
API Name	Customer_Order__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Prakash_Y 9/15/2025, 12:14 AM	Modified By	Prakash_Y 9/15/2025, 12:14 AM

Creating the Phone field in object Jewel Customer:

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays a 'Custom Field Definition Detail' for a field named 'Phone'. The field's properties are as follows:

Field Label	Phone	Object Name	Jewel Customer
Field Name	Phone	Data Type	Phone
API Name	Phone__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Prakash_Y 9/3/2025, 11:52 PM	Modified By	Prakash_Y 9/3/2025, 11:52 PM

Creating the Email field in object Jewel Customer:

The screenshot shows the Salesforce Setup interface with the following details:

Object Manager - **Jewel Customer**

Fields & Relationships tab selected.

Custom Field Definition Detail for the **Email** field:

- Field Information**:
 - Field Label: Email
 - Field Name: Email
 - API Name: Email_c
 - Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization are listed but empty.
 - Created By: Prakash_Y 9/3/2025, 11:52 PM
 - Modified By: Prakash_Y 9/3/2025, 11:52 PM
- Validation Rules**: None listed.
- Help for this Page**: A question mark icon.

Related Navigation: Details, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters.

Creating the Number field in Item object:

The screenshot shows the Salesforce Setup interface with the following details:

Object Manager - **Item**

Fields & Relationships tab selected.

Custom Field Definition Detail for the **Item Id** field:

- Field Information**:
 - Field Label: Item Id
 - Field Name: Item_Id
 - API Name: Item_Id_c
 - Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization are listed but empty.
 - Created By: Prakash_Y 9/15/2025, 12:17 AM
 - Modified By: Prakash_Y 9/15/2025, 12:17 AM
- Validation Rules**: None listed.
- Help for this Page**: A question mark icon.

Related Navigation: Details, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters.

Creating Picklist Field in Item Object:

The screenshot shows the Salesforce Setup interface for creating a custom field. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Item Custom Field Item Type'. It shows the 'Custom Field Definition Detail' page with the following details:

Field Label	Item Type	Object Name	Item
Field Name	Item_Type	Data Type	Picklist
API Name	Item_Type_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

At the bottom, it shows 'Created By' Prakash Y, 'Modified By' Prakash Y, and the current date and time.

Creating Currency Field in Price Object:

The screenshot shows the Salesforce Setup interface for creating a custom field. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Price'. It shows the 'Details' page with the following details:

Description	Enable Reports
API Name	✓
Price_c	
Custom	✓
Singular Label	Track Activities
Price	✓
Plural Label	Track Field History
Prices	✓
	Deployment Status
	In Development
	Help Settings
	Standard salesforce.com Help Window

At the bottom, it shows 'Edit' and 'Delete' buttons.

Field Label and Field Name as “Gold Price” and select formula return type as “Currency”.

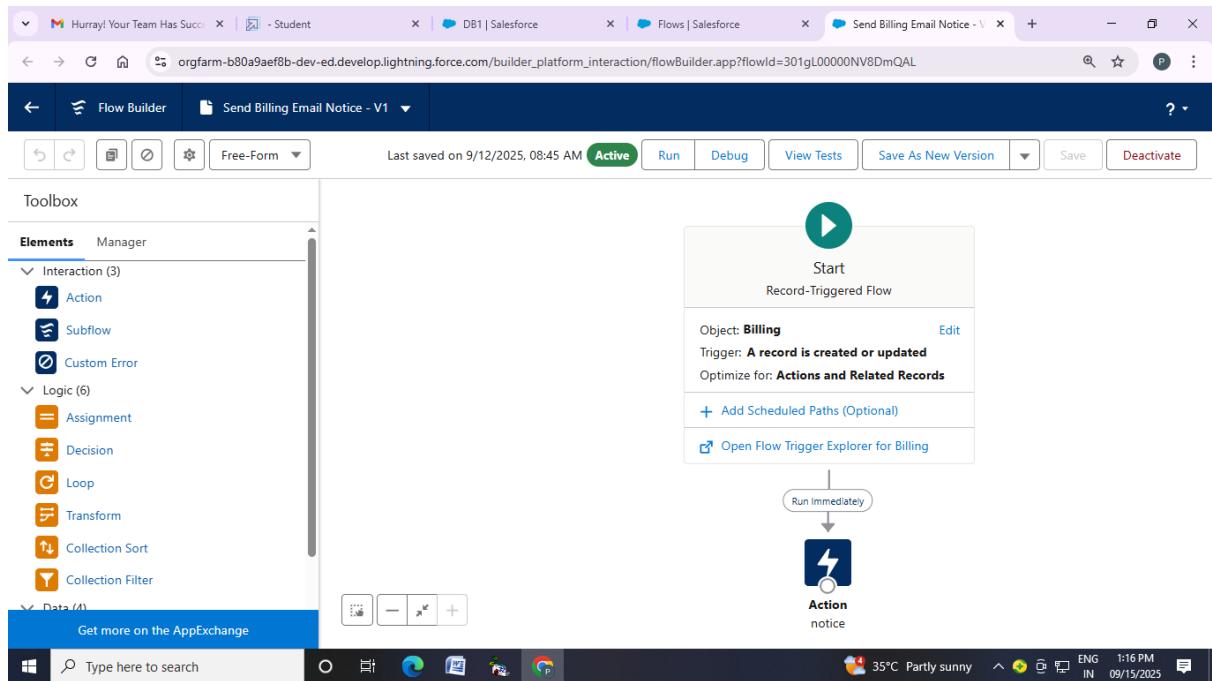
The screenshot shows the Salesforce Setup interface for creating a custom field. The left sidebar lists options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Price Custom Field Gold Price'. It shows the 'Custom Field Definition Detail' page with the following details:

Field Label	Gold Price	Object Name	Price
Field Name	Gold_Price	Data Type	Currency
API Name	Gold_Price__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Prakash Y 9/3/2025, 11:56 PM	Modified By	Prakash Y 9/3/2025, 11:56 PM

Creating the validation rule for Postal Code field in Jewel Customer object:

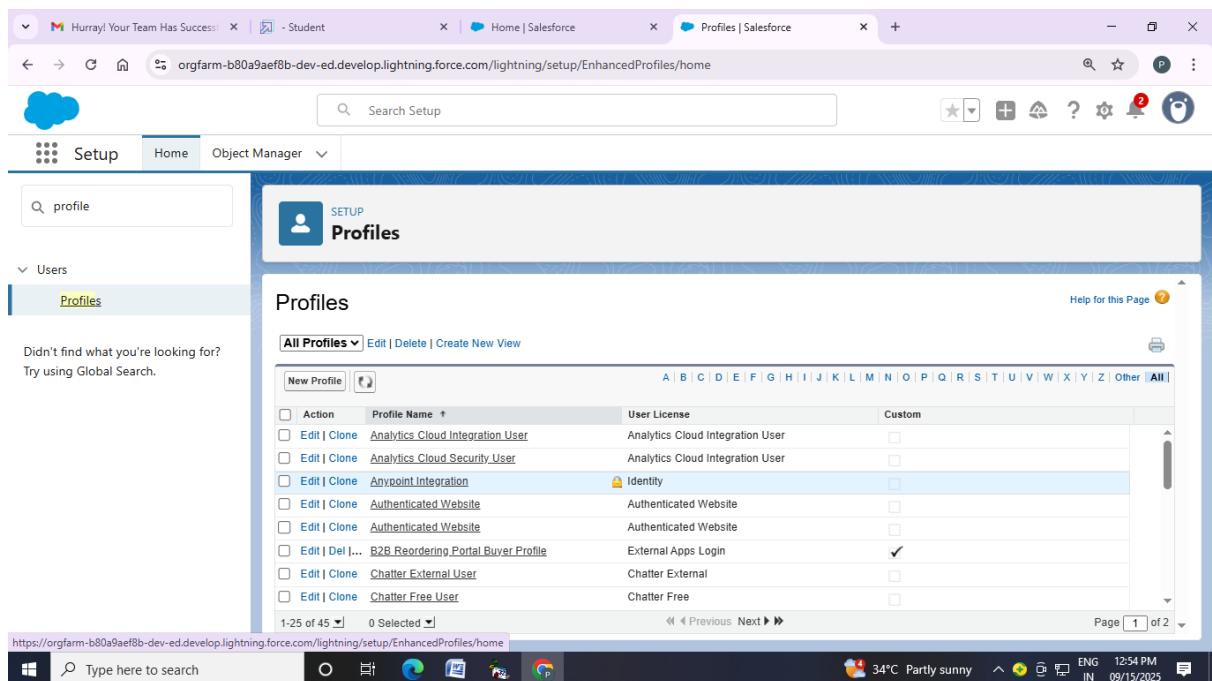
The screenshot shows the Salesforce Setup interface for creating validation rules. The left sidebar lists options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Jewel Customer | ValidationRules'. It shows the 'Validation Rules' table with the following data:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Postal_Code	Zip/Postal code	Must contain 6 digits	Prakash Y, 9/11/2025, 7:30 PM	
ValidationRule_For_JewelCustomerObject	Top of Page	Please fill Required fields	Prakash Y, 9/4/2025, 2:05 AM	



Profile:

Gold Smith Profile and Worker Profile:



Creating Gold Smith Role and create one more role as Worker which reports to Gold Smith:

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A search bar at the top contains 'Search Setup'. On the left, a sidebar has 'Users' expanded, with 'Profiles' selected. The main content area displays the 'Profile Gold Smith' page. It includes a 'Profile Detail' section with fields: Name (Gold Smith), User License (Salesforce), Description (empty), Created By (Prakash_Y, 9/4/2025, 2:07 AM), and Modified By (Prakash_Y, 9/15/2025, 12:17 AM). Below this is a 'Page Layouts' section with tabs for 'Standard Object Layouts' (Global, Global Layout) and 'Location Group Assignment' (Location Group Assignment Layout). At the bottom, there's a toolbar with icons for Home, Object Manager, and other setup functions.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A search bar at the top contains 'Search Setup'. On the left, a sidebar has 'Users' expanded, with 'Profiles' selected. The main content area displays the 'Profile Worker' page. It includes a 'Profile Detail' section with fields: Name (Worker), User License (Salesforce Platform), Description (empty), Created By (Prakash_Y, 9/4/2025, 2:09 AM), and Modified By (Prakash_Y, 9/15/2025, 12:17 AM). Below this is a 'Page Layouts' section with tabs for 'Standard Object Layouts' (Global, Global Layout) and 'Location Group Assignment' (Lead, Lead Layout). At the bottom, there's a toolbar with icons for Home, Object Manager, and other setup functions.

Create Users:

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, a sidebar lists various user management options like Permission Set Groups, Profiles, and Roles. The main area displays a table titled 'All Users' with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table contains several user entries, including 'Chatter_Expert', 'EPIC_OrgFarm', 'Mikaelson_Kol', 'Mikaelson_Niklaus', 'User_Integration', and 'User_Security'. Each entry includes a link to edit the user's details.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter_Expert	Chatty	00dg0000009zcv3uak.n1yphuo9x4zg@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	EPIC_OrgFarm	OEPIC	epic.27d59452c2b1@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
Edit	Mikaelson_Kol	kmlka	prakashgentle1edd1@gmail.com	Worker	<input checked="" type="checkbox"/>	Worker
Edit	Mikaelson_Niklaus	nmlka	prakashgentle1er@gmail.com	Gold Smith	<input checked="" type="checkbox"/>	Gold Smith
Edit	User_Integration	integ	integration@00dg000009zcv3uak.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00dg000009zcv3uak.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

The screenshot shows a detailed view of a user profile for 'Niklaus Mikaelson'. The top navigation bar includes links for 'Permission Set Assignments', 'Activation Required', 'Permission Set Group Assignments', 'Permission Set License Assignments', 'Personal Groups', 'Public Group Membership', 'Queue Membership', 'Team', 'Managers in the Role Hierarchy', 'OAuth Apps', 'Third-Party Account Links', 'Built-in Authenticators', 'Installed Mobile Apps', 'Authentication Settings for External Systems', 'Login History', and 'User Provisioning Accounts'. The main area displays 'User Detail' information for Niklaus Mikaelson, including fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, and various user status checkboxes like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, and Site.com Contributor User. The 'Active' checkbox is checked.

To Create a Gold Page layout and To Create a Gold Page layout:

The screenshot shows the Salesforce Object Manager interface for the 'Item' object. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts (which is selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Page Layouts' and displays three items: 'Item Layout', 'Page Layout for Gold', and 'Page Layout for Silver'. Each item has a 'Created By' field showing 'Prakash Y.' and a 'Modified By' field also showing 'Prakash Y.'. A 'Quick Find' search bar and a 'New' button are at the top of the list table.

The screenshot shows the Salesforce Page Layout editor for the 'Page Layout for Gold' of the Item object. The top navigation bar includes 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. The 'Fields' section on the left lists: Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. The main area contains a table with columns: Section, Customer Name, Item Name, Making Charges, Price, Record Type, and Tc. Rows include 'Blank Space' (Expected Days Of...), 'Amount' (Ornament, Priority, Stone/Other Price, Stone Weight), and 'Created By' (Gold Price, KDM, Owner, Percentage). Below the table is an 'Item Sample' panel and a 'Highlights Panel' with the placeholder text 'Customize the highlights panel for this page layout...'. At the bottom, there's a 'Quick Actions in the Salesforce Classic' section. The status bar at the bottom right shows '34°C Partly sunny', 'ENG IN 12:57 PM 09/15/2025', and a battery icon.

Page Layout for Silver

Section	Customer Name	Item Name	Making Charges	Price	Record Type
Blank Space	Expected Days Of ...	Item Type	Ornament	Priority	Silver Price
Amount	Gold Price	KDM	Owner	Purity	Stone/Other Price
Created By	Item Id	Last Modified By	Percentage	Purity Gold Price	Stone Weight

To Create a Record Type:

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	Prakash Y, 9/11/2025, 8:10 AM
Silver	Silver items information	✓	Prakash Y, 9/11/2025, 8:14 AM

Gold:

The screenshot shows the Salesforce Setup interface with the following details:

Record Type: Gold

Record Type Label: Gold

Record Type Name: Gold

Namespace Prefix: (None)

Description: Gold items information

Created By: Prakash_Y, 9/11/2025, 8:10 AM

Modified By: Prakash_Y, 9/11/2025, 8:10 AM

Picklists Available for Editing:

Action	Field	Modified Date
Edit	Expected Days Of Return	9/11/2025, 8:10 AM

Related Lookup Filters:

Silver :

The screenshot shows the Salesforce Setup interface with the following details:

Record Type: Silver

Record Type Label: Silver

Record Type Name: Silver

Namespace Prefix: (None)

Description: Silver items information

Created By: Prakash_Y, 9/11/2025, 8:14 AM

Modified By: Prakash_Y, 9/11/2025, 8:14 AM

Picklists Available for Editing:

Action	Field	Modified Date
Edit	Expected Days Of Return	9/11/2025, 8:14 AM

Creating permission set:

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar is collapsed, and the main content area displays a table of permission sets. The table has columns for Action, Permission Set Name, Description, and License. Most entries are labeled '(Legacy) Data Cloud ...' and are associated with the 'Customer Data Platform' license. A search bar at the top right says 'Search Setup'.

Action	Permission Set Name	Description	License
<input type="checkbox"/>	(Legacy) Data Cloud Aware Specialist	This Data Cloud permission set will be deprecated i...	Customer Data Platform
<input type="checkbox"/>	(Legacy) Data Cloud Marketing Admin	Allows access to Data Cloud Setup if the user is als...	Customer Data Cloud for Marketing
<input type="checkbox"/>	(Legacy) Data Cloud Marketing Manager	This Data Cloud permission set will be deprecated i...	Customer Data Platform
<input type="checkbox"/>	(Legacy) Data Cloud Marketing Specialist	This Data Cloud permission set will be deprecated i...	Customer Data Platform
<input type="checkbox"/>	(Legacy) Data Cloud for Marketing Data Aware Spec...	This Data Cloud permission set will be deprecated i...	Customer Data Cloud for Marketing
<input type="checkbox"/>	(Legacy) Data Cloud for Marketing Manager	This Data Cloud permission set will be deprecated i...	Customer Data Cloud for Marketing
<input type="checkbox"/>	(Legacy) Data Cloud for Marketing Specialist	This Data Cloud permission set will be deprecated i...	Customer Data Cloud for Marketing
<input type="checkbox"/>	(Legacy) Data Cloud for Marketing Worker	This Data Cloud permission set will be deprecated i...	Customer Data Cloud for Marketing

The screenshot shows the details of a specific permission set named 'Per to Worker'. The left sidebar is collapsed, and the main content area shows the 'Permission Set Overview' section. It includes fields for Description, License (set to 'Standard'), Session Activation Required (unchecked), Namespace Prefix ('Per_to_Worker'), and Created By ('Prakash Y'). Below this is the 'Apps' section, which contains sections for 'Assigned Apps' and 'Assigned Connected Apps'. A search bar at the top right says 'Search Setup'.

Permission Set Overview

Description	API Name
Standard	Per_to_Worker

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

TRIGGER

Trigger handler:

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:

```
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);  
    }  
}
```

USER ADOPTION

Create Users:

The screenshot shows the 'Jewel Customers' list view in the 'Jewellery Inventory' application. The top navigation bar includes tabs for 'Student', 'All | Jewel Customers | Salesforce', and 'Permission Sets | Salesforce'. The main content area displays a table with two items: 'Hari' and 'Prakash', both sorted by Customer Name. The interface features standard Salesforce navigation and search tools.

Create Reports:

The screenshot shows the 'Reports' list view in the 'Jewellery Inventory' application. The top navigation bar includes tabs for 'Student', 'Recent | Reports | Salesforce', and 'Permission Sets | Salesforce'. The main content area displays a table of recent reports, including 'New Report', 'New Item with Billings Report', and 'New Prices Report'. The left sidebar provides navigation links for 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'Folders', 'Created by Me', 'Shared with Me', and 'Favorites'. The bottom navigation bar includes a search bar and system status indicators.

Price Report

The screenshot shows a Salesforce report titled "Report: Prices New Prices Report". The table displays 10 records with columns: Price, Price Name, Gold Price, and Silver Price. The total gold price is \$782,000 and the total silver price is \$78,100.00000.

	Price: Price Name	Gold Price	Silver Price
1	P-0004	\$78,000	\$7,800.00000
2	P-0002	\$80,000	\$8,000.00000
3	P-0009	\$80,000	\$7,900.00000
4	P-0005	\$81,000	\$8,100.00000
5	P-0008	\$78,000	\$7,800.00000
6	P-0003	\$75,000	\$7,500.00000
7	P-0006	\$79,000	\$7,900.00000
8	P-0001	\$80,000	\$8,000.00000
9	P-0007	\$69,000	\$6,900.00000
10	P-0010	\$82,000	\$8,200.00000

Create a report with report type: “Item with Billings”. Create a report with report type: “Billings with item and Customer order”

The screenshot shows a Salesforce report titled "Report: Item with Billings New Item with Billings Report". The table displays 1 record with columns: Item Name and Billing Name. The item name is Chain and the billing name is B-001.

	Item Name	Billing Name
1	Chain	B-001

Create Dashboard:

The screenshot shows the Salesforce Dashboards page. The top navigation bar includes tabs for 'Recent | Dashboards | Salesforce' and 'Permission Sets | Salesforce'. The main content area displays a table of recent dashboards. The columns are: Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. Two dashboards are listed: 'DB1' and 'DB2', both created by 'Prakash Y' on 9/11/2025. The left sidebar contains filters for 'Dashboards', 'Recent', 'Created by Me', 'Private Dashboards', 'All Dashboards', 'Folders', 'All Folders', 'Created by Me', 'Shared with Me', and 'Favorites'. The bottom status bar shows system information like temperature, weather, and date.

Dashboards	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	DB1	Private Dashboards	Prakash Y	9/11/2025, 7:56 PM		
Created by Me	DB2	Private Dashboards	Prakash Y	9/11/2025, 7:57 PM		

The screenshot shows the 'DB1' dashboard. The top navigation bar includes tabs for 'Recent | Dashboards | Salesforce' and 'Permission Sets | Salesforce'. The main content area displays a report titled 'New Prices Report'. The report table has columns: Price, Price Name, Gold Price, and Silver Price. The data is as follows:

Price	Price Name	Gold Price	Silver Price
P-0001		\$80k	\$8.0000k
P-0002		\$80k	\$8.0000k
P-0003		\$75k	\$7.5000k
P-0004		\$78k	\$7.8000k
P-0005		\$81k	\$8.1000k
P-0006		\$79k	\$7.9000k
P-0007		\$69k	\$6.9000k

Below the report, there are links for 'View Report (New Prices Report)' and 'As of Sep 11, 2025, 7:57 PM'. The bottom status bar shows system information like temperature, weather, and date.

Create a Flow:

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Hurrah! Your Team Has Success!, - Student, DB1 | Salesforce, Flows | Salesforce.
- Left Sidebar:** Setup, Home, Object Manager, FLOWS, Process Automation (Flows), Identity (Login Flows).
- Center Content:** Flows section with a "All Flows" button and a table of flow definitions. The table includes columns: Flow Label, Process Type, Active, Trigger, Package Status, Last Run, Last Modified, and Last Run By.
- Table Data:**

Flow Label	Process Type	Active	Trigger	Package Status	Last Run	Last Modified	Last Run By
Close Chang...	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Instal...			
CMS: Check ...	Evaluation Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Instal...			
CMS: Notify ...	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Instal...			
CMS: Review...	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Instal...			
CMS: Submit...	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Instal...			
CMS: Withdr...	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Instal...			
Create a Case	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Instal...			
- Bottom:** Type here to search, system tray with date/time.

The screenshot shows the Salesforce Flow Builder interface for a flow named "Send Billing Email Notice - V1".

- Header:** Hurrah! Your Team Has Success!, - Student, DB1 | Salesforce, Flows | Salesforce, Send Billing Email Notice - V1.
- Toolbar:** Back, Forward, Refresh, Save, Free-Form, Run, Debug, View Tests, Save As New Version, Save, Deactivate.
- Toolbox:** Elements Manager, Interaction (3) [Action, Subflow, Custom Error], Logic (6) [Assignment, Decision, Loop, Transform, Collection Sort, Collection Filter].
- Flow Diagram:** A Record-Triggered Flow for the Billing object. It starts with a "Start" step (Record-Triggered Flow) triggered by "A record is created or updated" on the Billing object. This leads to an "Action" step (notice) with the label "Action notice".
- Bottom:** Type here to search, system tray with date/time.

ADVANTAGES & DISADVANTAGES

ADVANTAGES:

Organizes customer and sales data. Improves service and communication. Tracks inventory easily. Supports better decisions.

DISADVANTAGES:

Setup and maintenance costs. Need training. Risk of data breaches. Can reduce personal touch.

CONCLUSION:

The CRM application for jewel management helps businesses serve customers better, manage sales, and organize inventory efficiently. Though it has some costs and risks, it ultimately improves productivity and customer satisfaction, supporting long-term growth.