



CRM APPLICATION FOR JEWEL MANAGEMENT

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Project Overview

This project involves the development of a CRM-based Jewel Management System using Salesforce. It streamlines operations like inventory tracking, price updates, billing, and customer management for a jewellery business. The project leverages Salesforce Lightning Platform to design custom objects, automate processes using Flows, and generate actionable insights via dashboards and reports.

Objectives

The objective of the CRM application for Salesforce management is to efficiently manage customer data, automate sales processes, improve customer relationships, and enhance overall business performance through better tracking, reporting, and communication.

Business Goals:

- **Increase Sales Revenue :** Improve sales performance by automating the sales process and identifying new opportunities.
- **Enhance Customer Satisfaction:** Provide personalized service and quick responses to build stronger customer relationships.
- **Improve Sales Team Productivity:** Reduce manual work through automation and centralized data access.

Salesforce Key Features and Concepts Utilized

The CRM application utilizes Custom Objects and Fields are created to store essential data such as customer details, jewellery items, orders, and sales transactions.

Custom Objects

Jewel Customer :

This object stores and manages all essential customer-related information such as name, contact details, address, purchase history, and preferences. we have to repeat the same step for customer order ,Billing,price.

SETUP > OBJECT MANAGER
Jewel Customer

Details

Fields & Relationships
14 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Country	Country__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Customer	Name	Text(80)		✓
Email	Email__c	Email		
Item	Item__c	Lookup(Item)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Ornament	Ornament__c	Formula (Text)		
Owner	OwnerId	Lookup(User,Group)		✓

Item :

It stores detailed information about every piece of jewellery, such as the item name, category (e.g., ring, necklace, bracelet, earring), metal type(gold, silver, platinum), weight, purity, price, and stock quantity.

Item | Salesforce

orgfarm-4f8a8ec7d2-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01lg5000000CvNV/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Item

Details

Fields & Relationships
24 Items, Sorted by Field Label

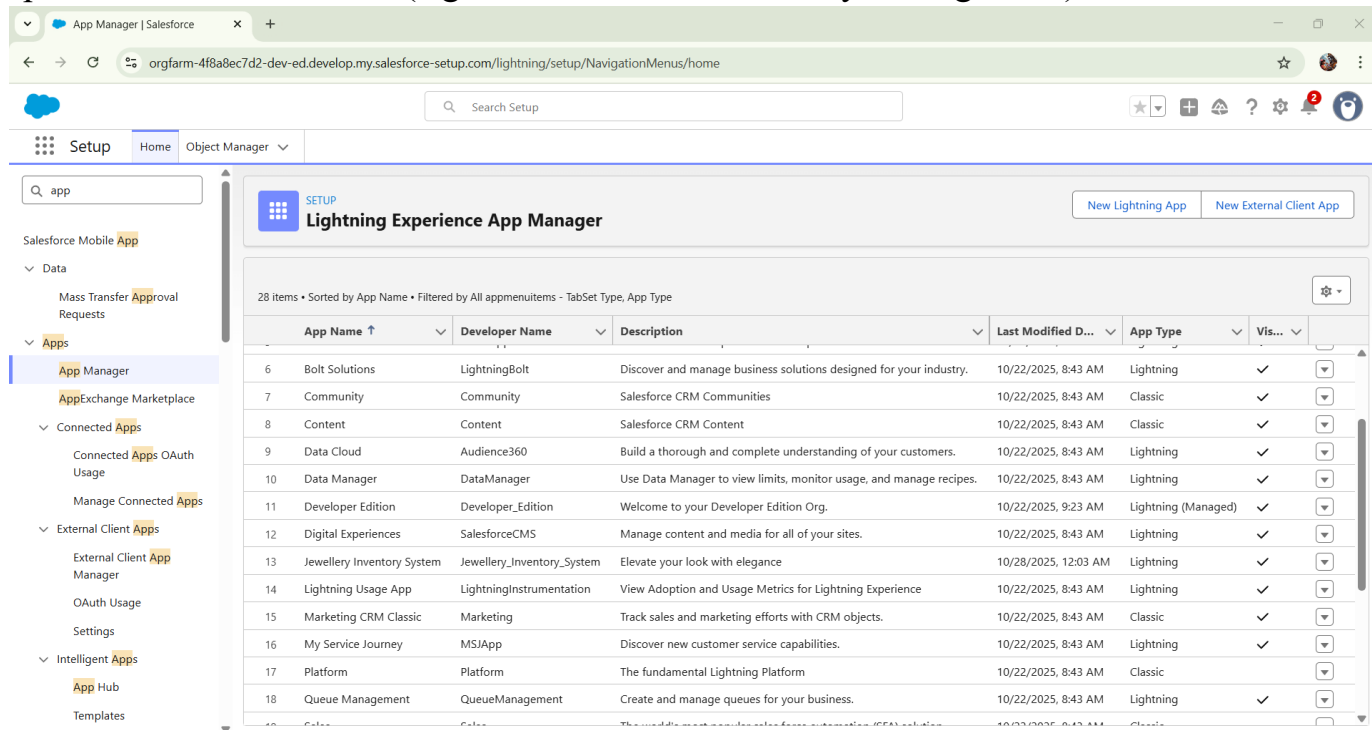
Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Billing	Billing__c	Lookup(Billing)		✓
Created By	CreatedById	Lookup(User)		
Customer Name	Customer_Name__c	Lookup(Jewel Customer)		✓
Expected Days Of Return	Expected_Days_Of_Return__c	Picklist	Priority	
Gold Price	Gold_Price__c	Formula (Currency)		
Item Name	Name	Auto Number		✓
Item Type	Item_Type__c	Picklist		
KDM	KDM__c	Formula (Currency)		

Lightning App

A container that holds navigation tabs, utilities, and pages related to a specific business function (e.g., Sales, Service, Jewellery Management).



Fields

i. Lookup Relationship :

A lookup relationship connects one record to another in a loosely coupled way.

ii. Master-Detail Relationship :

A Master-Detail Relationship is a strong, tightly coupled relationship between two objects (or entities).

Trigger :

A trigger is a piece of code usually Apex in Salesforce logic that executes before or after certain data manipulation events (DML operations) occur on a record in the CRM database.

Apex Triggers | Salesforce

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Setup Home Object Manager

apex

Apex Triggers

Apex Trigger UpdatePaidAmountTrigger

Apex Trigger Detail

Name	UpdatePaidAmountTrigger	sObject Type	Billing
Code Coverage	0% (0/4)	Status	Active
Created By	Priyadharshini S. 10/29/2025, 2:16 AM	Last Modified By	Priyadharshini S. 10/29/2025, 2:30 AM
Namespace Prefix			

Apex Trigger Version Settings Trace Flags

```
1 trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {
2
3   if (Trigger.isBefore && Trigger.isInsert) {
4     UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);
5   }
6
7   if (Trigger.isBefore && Trigger.isUpdate) {
8     UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap, Trigger.new);
9   }
10
11 }
```

Reports

Reports give access to data.

Recent | Reports | Salesforce

orgfarm-4f8a8ec7d2-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mrui

Jewellery Inventory System Reports

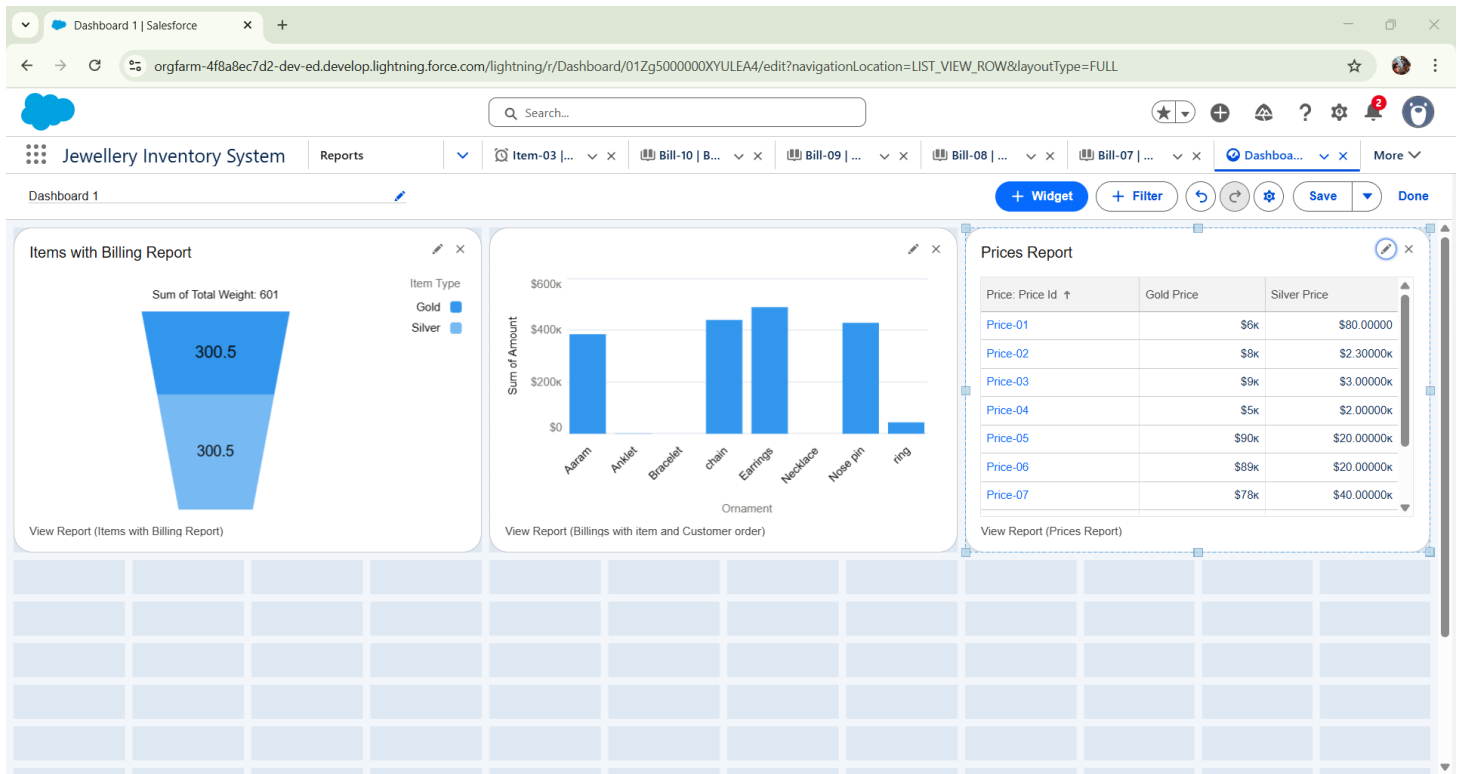
Item-03 Bill-10 Bill-09 Bill-08 Bill-07 Dashboa...

Recent 4 items

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Prices Report		Public Reports	Priyadharshini S	10/30/2025, 9:58 PM	
Created by Me	Billings with item and Customer order		Public Reports	Priyadharshini S	10/30/2025, 11:33 PM	
Private Reports	Items with Billing Report		Public Reports	Priyadharshini S	10/30/2025, 11:16 PM	
Public Reports	Billings with Item Report		Public Reports	Priyadharshini S	10/30/2025, 11:19 PM	
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

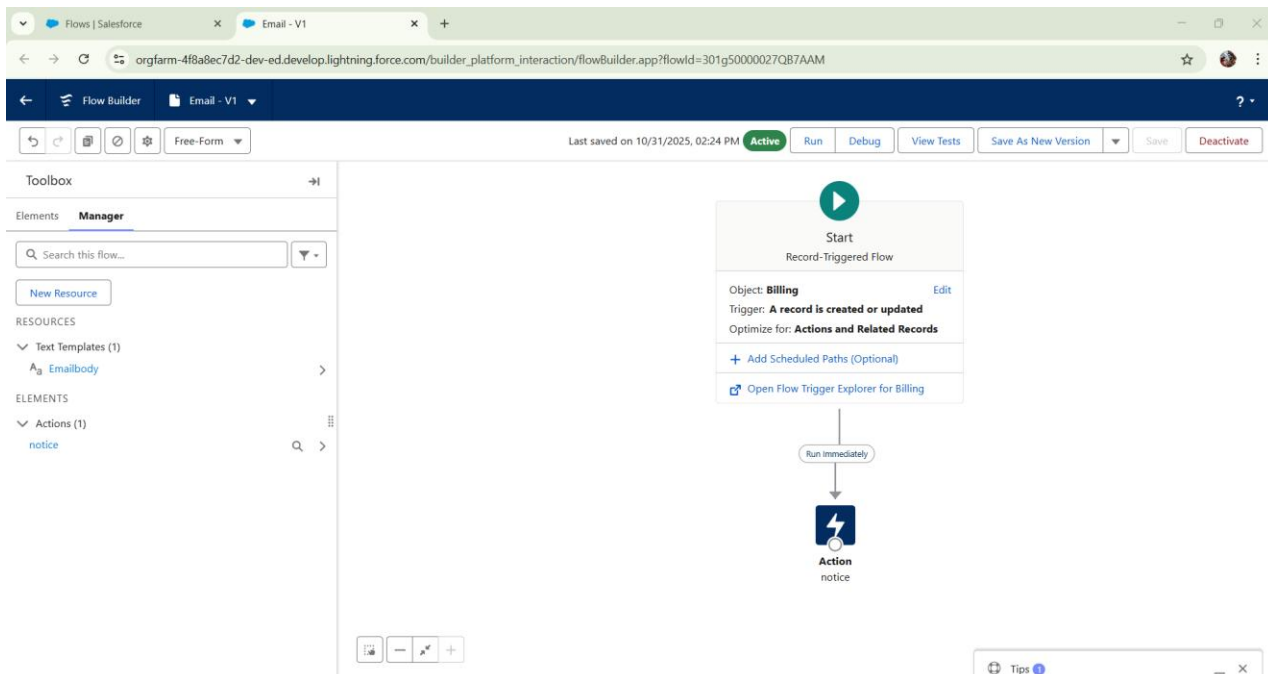
Dashboards:

A Dashboard is a visual representation of your business data, usually built from one or more reports.



Flows

A Flow is an automation process that performs a series of actions based on defined logic, often without writing any code.



Detailed Steps :

The application will manage customer relationships, track jewel purchases, and maintain inventory. It will include modules for customer profiling, sales tracking, and inventory management.

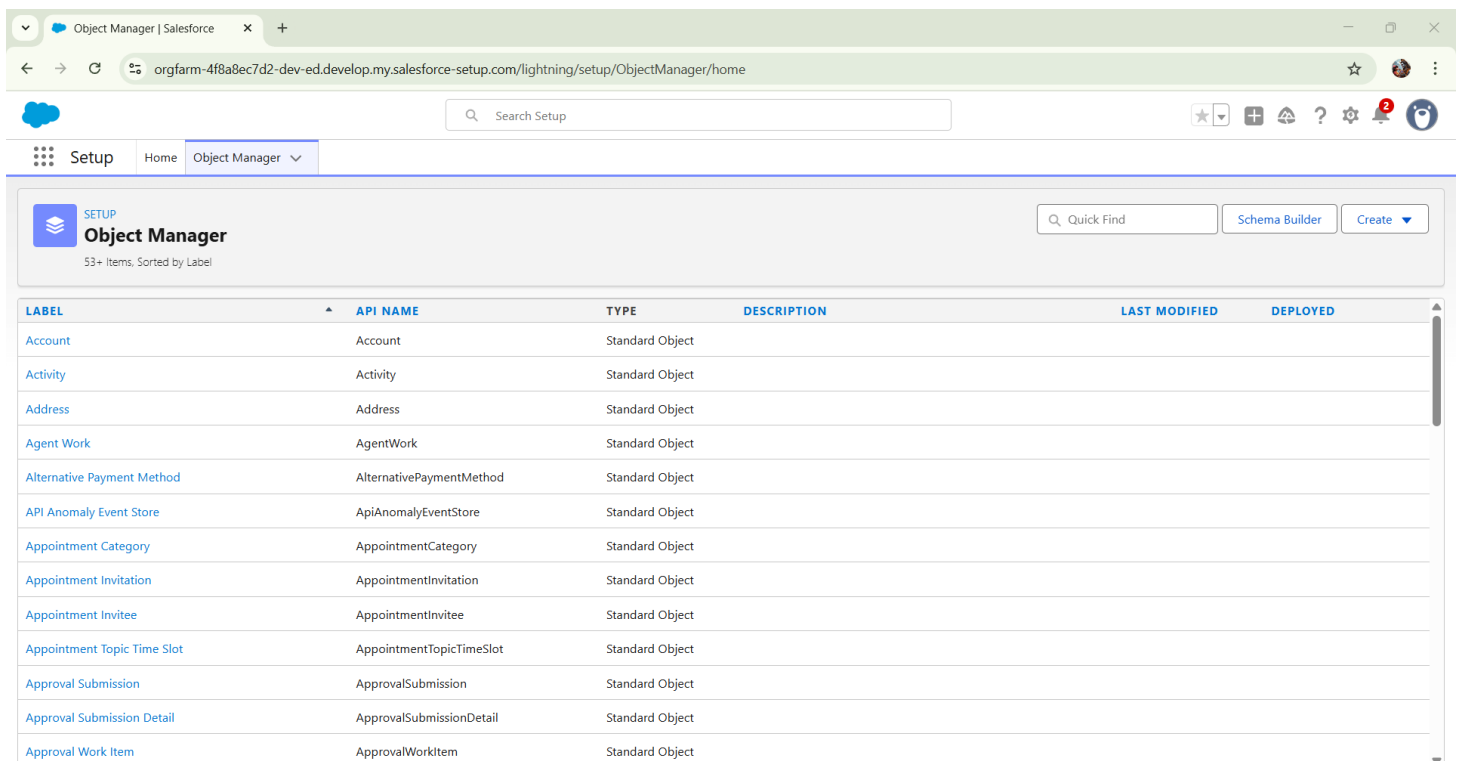
Step 1: Developer Account Setup

Registered for a Salesforce Developer account to create a dedicated environment for development and testing.

- Verified the account to unlock full access to Salesforce features

Step 2 : Custom Object Creation

Used Salesforce Object Manager to design custom objects for Jewel Customer, Item, Customer Order, Price, Billing.

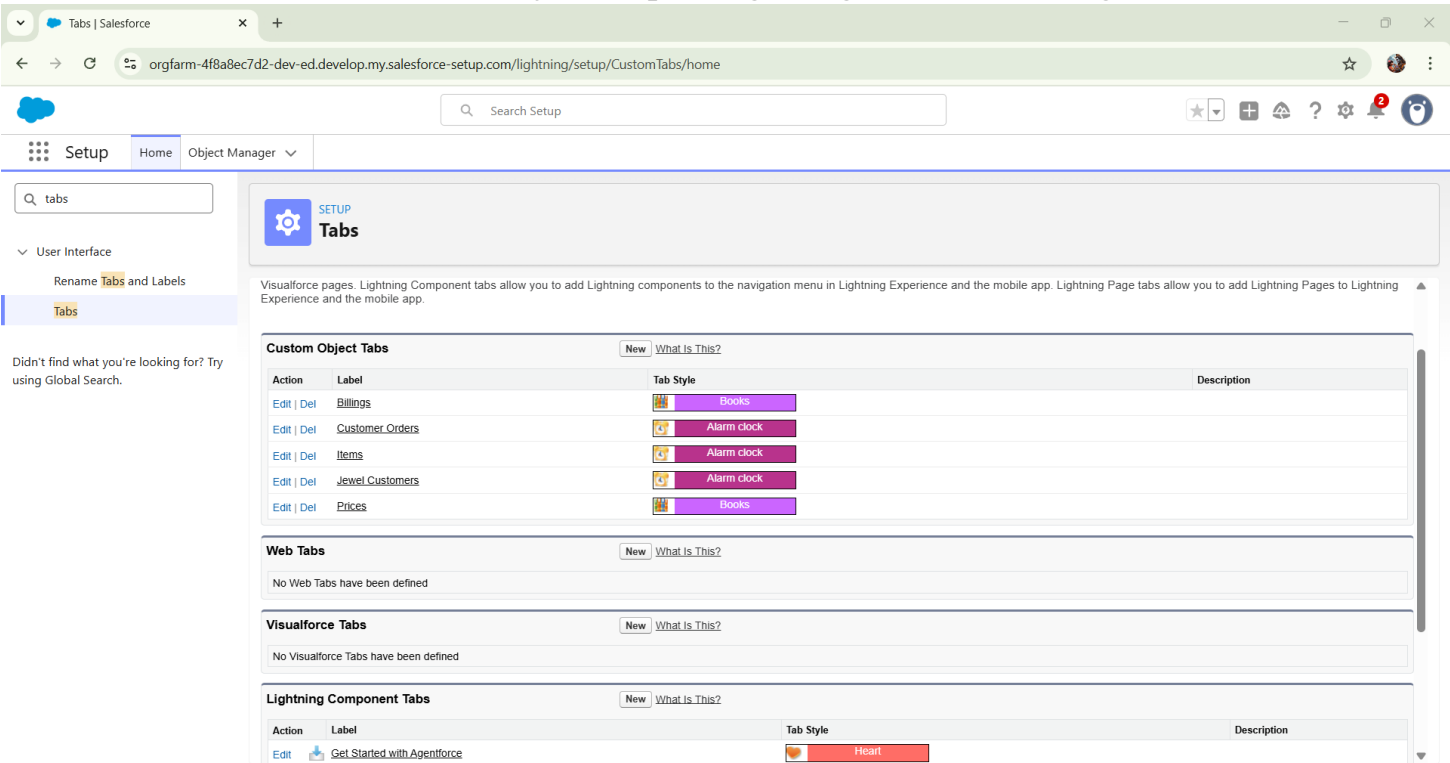


The screenshot shows the Salesforce Object Manager interface. The browser address bar indicates the URL: `orgfarm-4f8a8ec7d2-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/home`. The page header includes a search bar labeled "Search Setup" and navigation tabs for "Setup", "Home", and "Object Manager". Below the header, the "Object Manager" section displays "53+ Items, Sorted by Label". A table lists various standard objects with columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The objects listed include Account, Activity, Address, Agent Work, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Approval Submission, Approval Submission Detail, and Approval Work Item.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Address	Address	Standard Object			
Agent Work	AgentWork	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Approval Submission	ApprovalSubmission	Standard Object			
Approval Submission Detail	ApprovalSubmissionDetail	Standard Object			
Approval Work Item	ApprovalWorkItem	Standard Object			

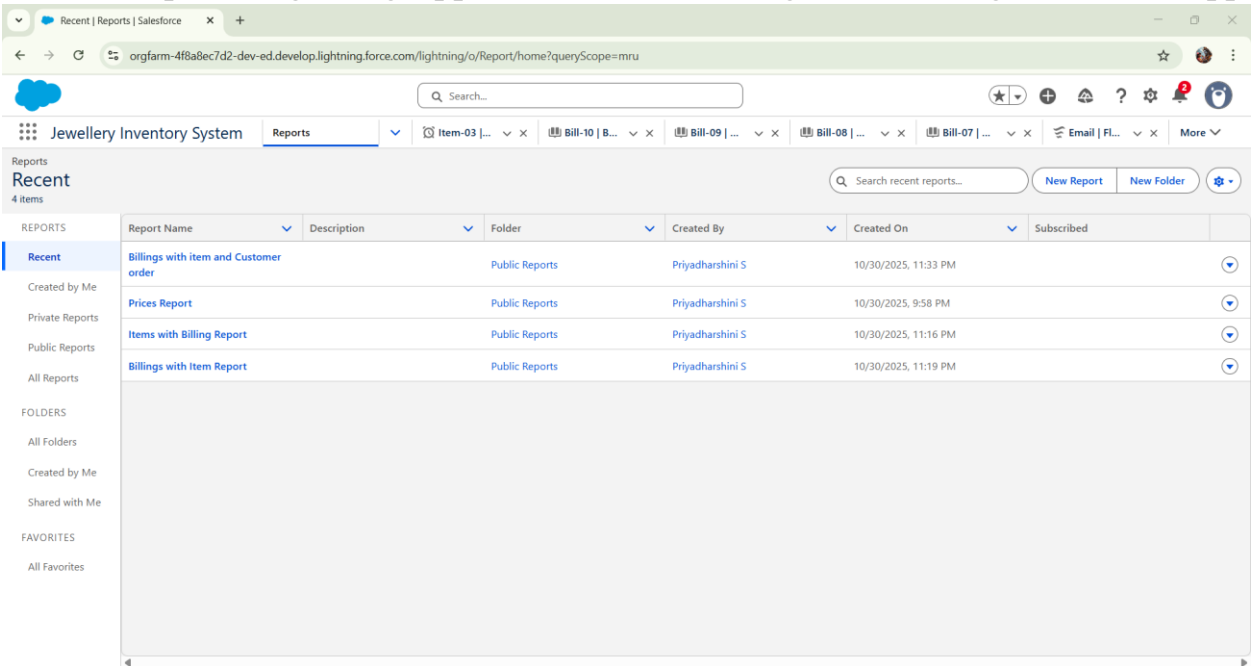
Step 3 : Custom Tab for Navigation

Created custom tabs for each object, improving navigation and making it easier



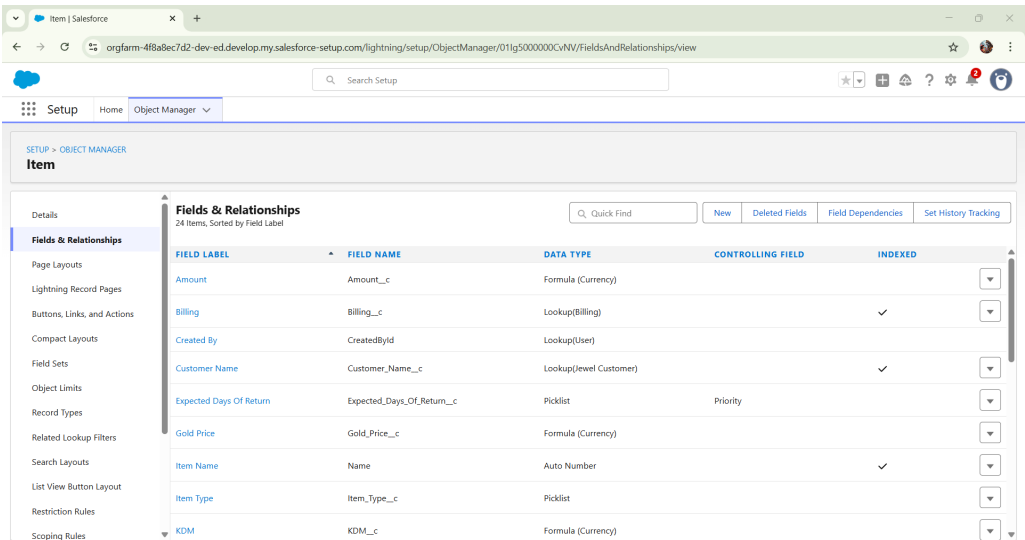
Step 4 : Lightning App Development

Developed a Lightning App named "Jewel management " using Salesforce App Manager



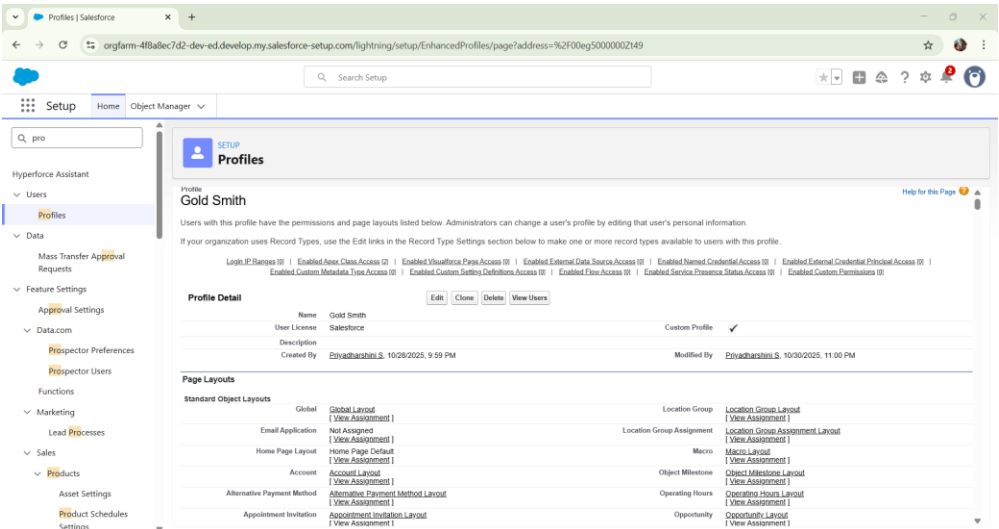
Step 5 : Fields

Defined relationships between objects using Master-Detail and Lookup fields.



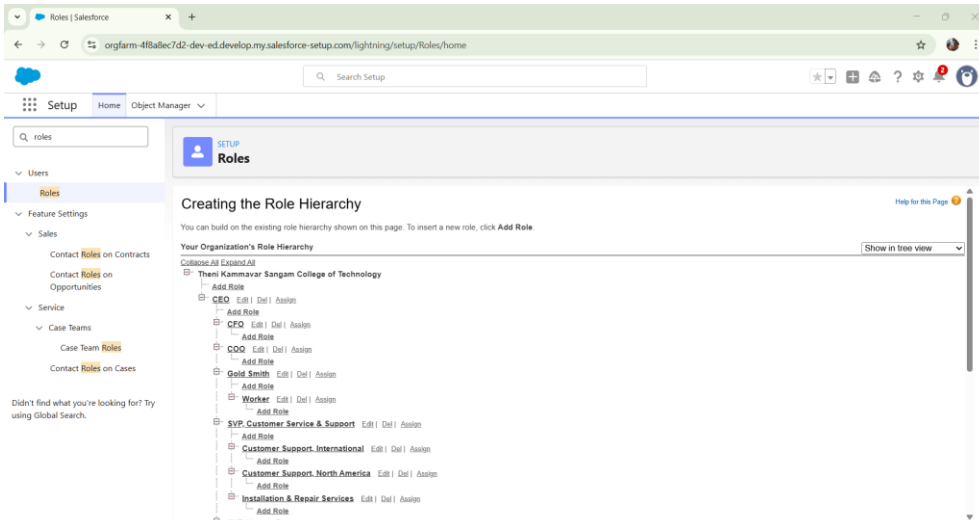
Step 6 : Profiles

A profile is a group of settings that define what a user can do in salesforce



Step 6: Roles

A role in Salesforce defines a user's visibility access

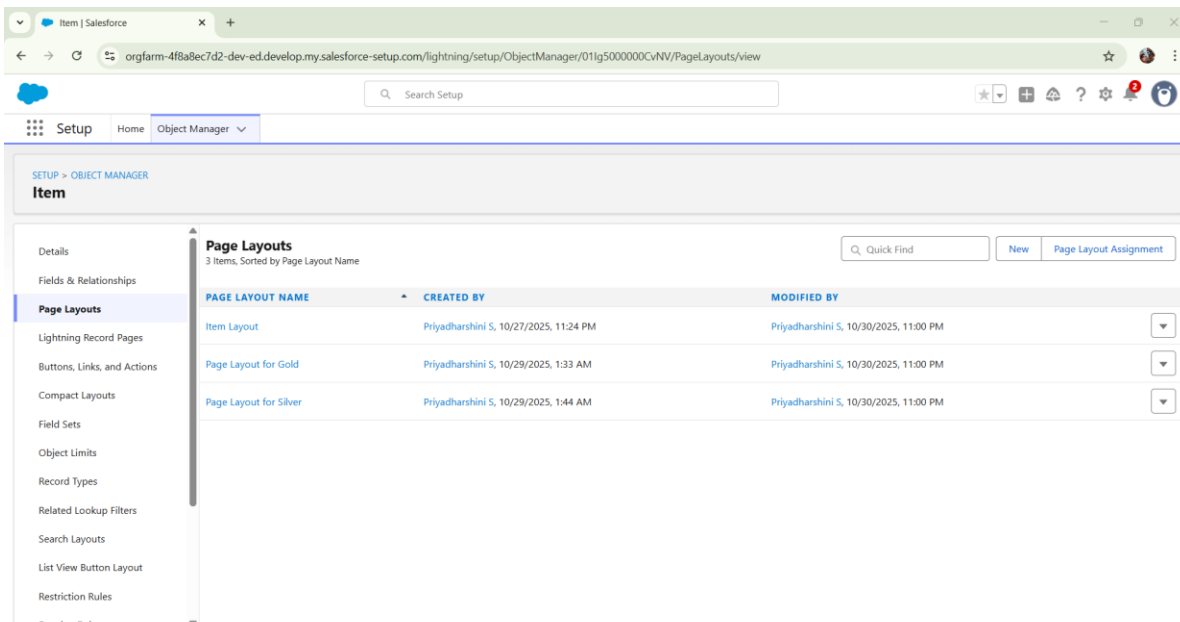


Step 7: Users

A user is anyone who logs in Salesforce. Users are employees at your company , such as sales reps , managers who need to access to the records

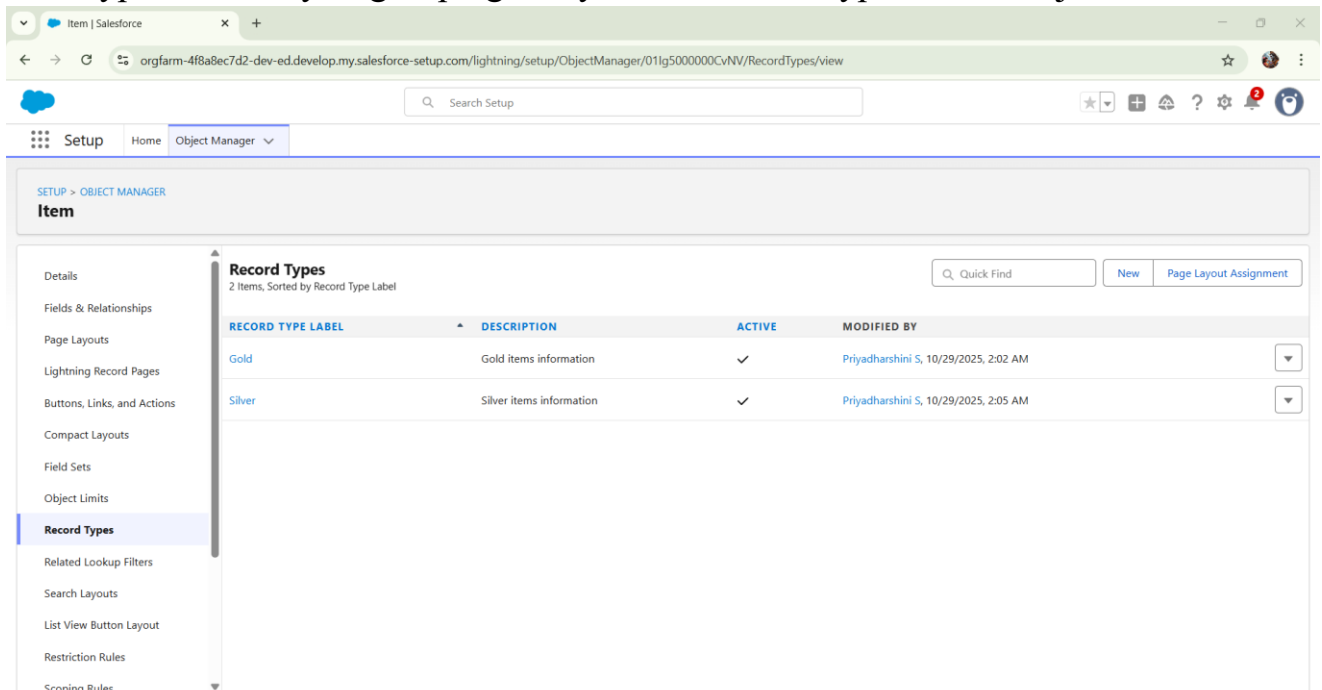
Step 8: Page layouts

Page Layout in Salesforce allows to customise the design



Step 9: Record Types

Record types are a way of grouping many records of one type for that object



Step 10: permission set

A permission set consists of a group of common permissions for a feature associated with a license.

Step 11: Trigger

A trigger is a piece of code of Apex code that automatically runs before or after events

Step 12: User Adoption

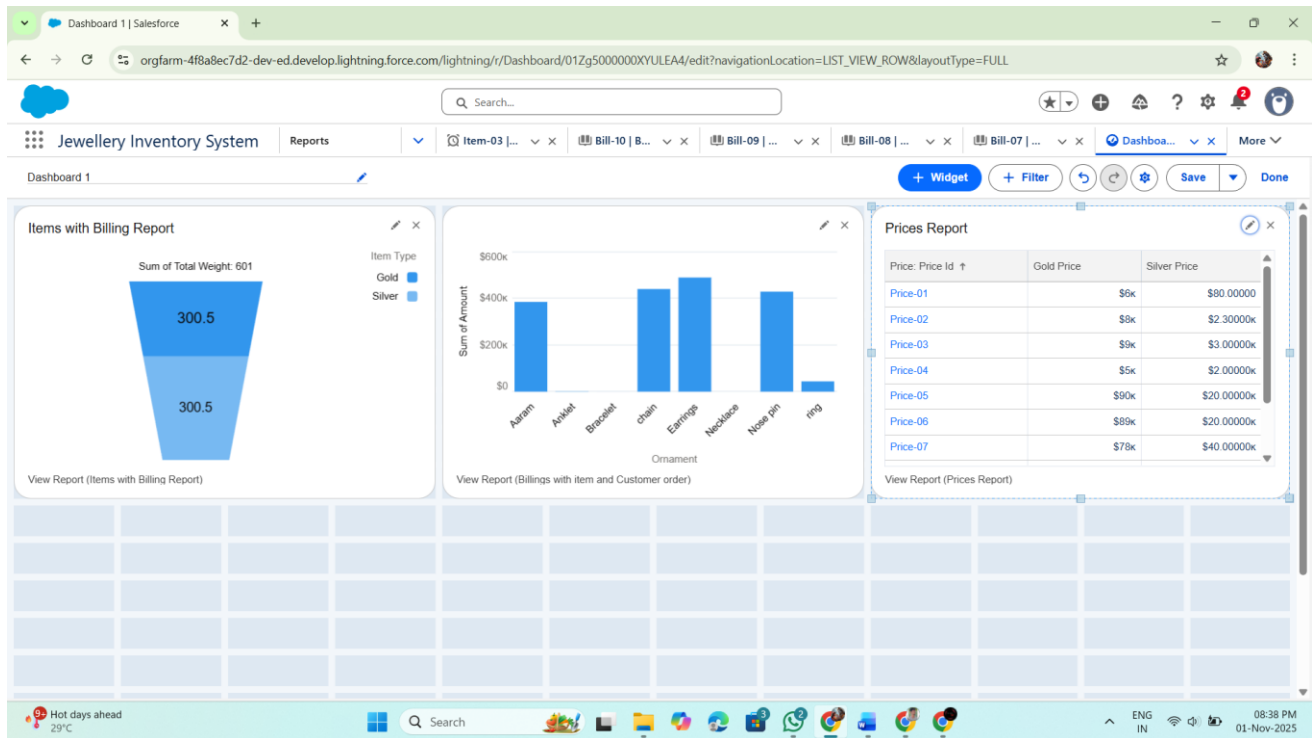
Admin will perform tasks like creating and editing users , reset passwords , granting permissions and data access

Step 13: Reports and Dashboards

Reports give you access to your Salesforce data . Salesforce data in almost infinite combination, display it in easy to understand formats and share the resulting insights with others. Dashboards help you visually understand changing business conditions so users can make decisions based on the real time data

Key Scenarios Addressed by Salesforce in the Implementation Project

- 1.Customer Profiling: Managing customer information, purchase history, and preferences to provide personalized service and targeted marketing.
2. Sales Tracking: Tracking sales performance, managing leads, and forecasting sales to optimize sales strategies.
3. Inventory Management: Managing jewel inventory, tracking stock levels, and automating replenishment to ensure optimal stock levels.
4. Order Management: Managing orders, from quote to cash, and tracking order status to ensure timely delivery.
5. Customer Service: Providing excellent customer service through timely issue resolution, returns management, and warranty tracking.
6. Marketing Automation: Automating marketing campaigns, tracking customer interactions, and analyzing campaign effectiveness.
7. Reporting and Analytics: Generating reports on sales performance, customer behavior, and inventory levels to inform business decisions.



Conclusion for CRM Application for Jewel Management:

A CRM application tailored for jewel management can revolutionize the way jewel retailers interact with customers, manage sales, and optimize inventory. By leveraging customer data, sales insights, and inventory analytics, jewel retailers can enhance customer satisfaction, drive sales growth, and maintain a competitive edge in the market. With a well-implemented CRM system, jewel retailers can streamline operations, improve customer relationships, and ultimately increase revenue and profitability.