



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.

Jewel Customer

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 :

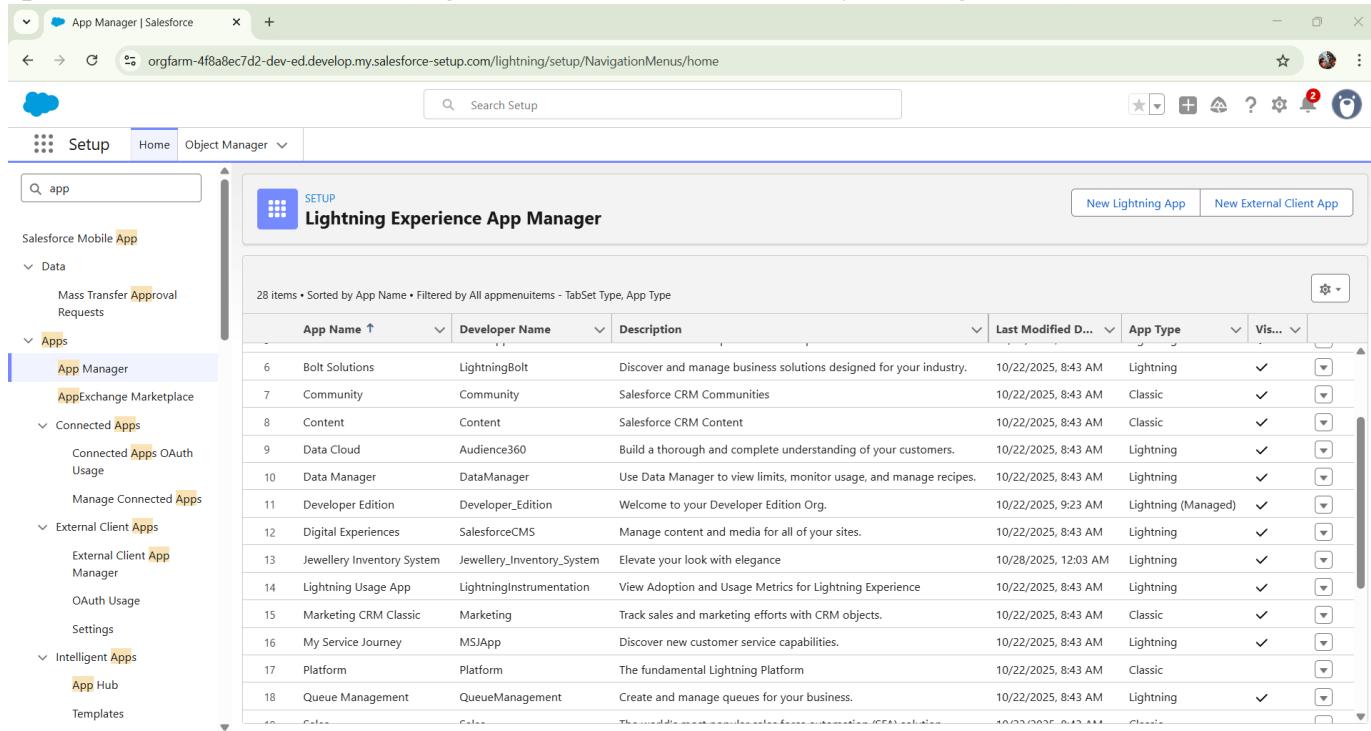
It stores detailed information about every piece of jewellery, such as the item name, category (e.g., ring, necklace, bracelet, earring), metal type(gold, silver, platinum), weight, purity, price, and stock quantity.

Item

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).



The screenshot shows the 'Lightning Experience App Manager' page in the Salesforce Setup. The left sidebar is collapsed, showing categories like 'Salesforce Mobile App', 'Data', 'Apps' (with 'App Manager' selected), 'Connected Apps', 'External Client Apps', and 'Intelligent Apps'. The main content area is titled 'Lightning Experience App Manager' and displays a table of 28 items. The columns are 'App Name ↑', 'Developer Name', 'Description', 'Last Modified D...', 'App Type', and 'Vis...'. The table lists various apps such as Bolt Solutions, Community, Content, Data Cloud, Data Manager, Developer Edition, Digital Experiences, Jewellery Inventory System, Lightning Usage App, Marketing CRM Classic, My Service Journey, Platform, and Queue Management.

App Name ↑	Developer Name	Description	Last Modified D...	App Type	Vis...
6 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	10/22/2025, 8:43 AM	Lightning	▼
7 Community	Community	Salesforce CRM Communities	10/22/2025, 8:43 AM	Classic	▼
8 Content	Content	Salesforce CRM Content	10/22/2025, 8:43 AM	Classic	▼
9 Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	10/22/2025, 8:43 AM	Lightning	▼
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	10/22/2025, 8:43 AM	Lightning	▼
11 Developer Edition	Developer_Edition	Welcome to your Developer Edition Org.	10/22/2025, 9:23 AM	Lightning (Managed)	▼
12 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	10/22/2025, 8:43 AM	Lightning	▼
13 Jewellery Inventory System	Jewellery_Inventory_System	Elevate your look with elegance	10/28/2025, 12:03 AM	Lightning	▼
14 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	10/22/2025, 8:43 AM	Lightning	▼
15 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	10/22/2025, 8:43 AM	Classic	▼
16 My Service Journey	MSJApp	Discover new customer service capabilities.	10/22/2025, 8:43 AM	Lightning	▼
17 Platform	Platform	The fundamental Lightning Platform	10/22/2025, 8:43 AM	Classic	▼
18 Queue Management	QueueManagement	Create and manage queues for your business.	10/22/2025, 8:43 AM	Lightning	▼

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.

The screenshot shows the Salesforce Setup interface under the Apex Triggers section. A search bar at the top left contains the query "apex". On the left sidebar, the "Apex Triggers" option is selected. The main content area displays the details for the "UpdatePaidAmountTrigger".

Apex Trigger Detail

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

Apex Trigger

```
trigger UpdatePaidAmountTrigger on Billing__c (before insert, before update) {
    if (Trigger.isBefore && Trigger.isInsert) {
        UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);
    }
    if (Trigger.isBefore && Trigger.isUpdate) {
        UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap, Trigger.new);
    }
}
```

Reports

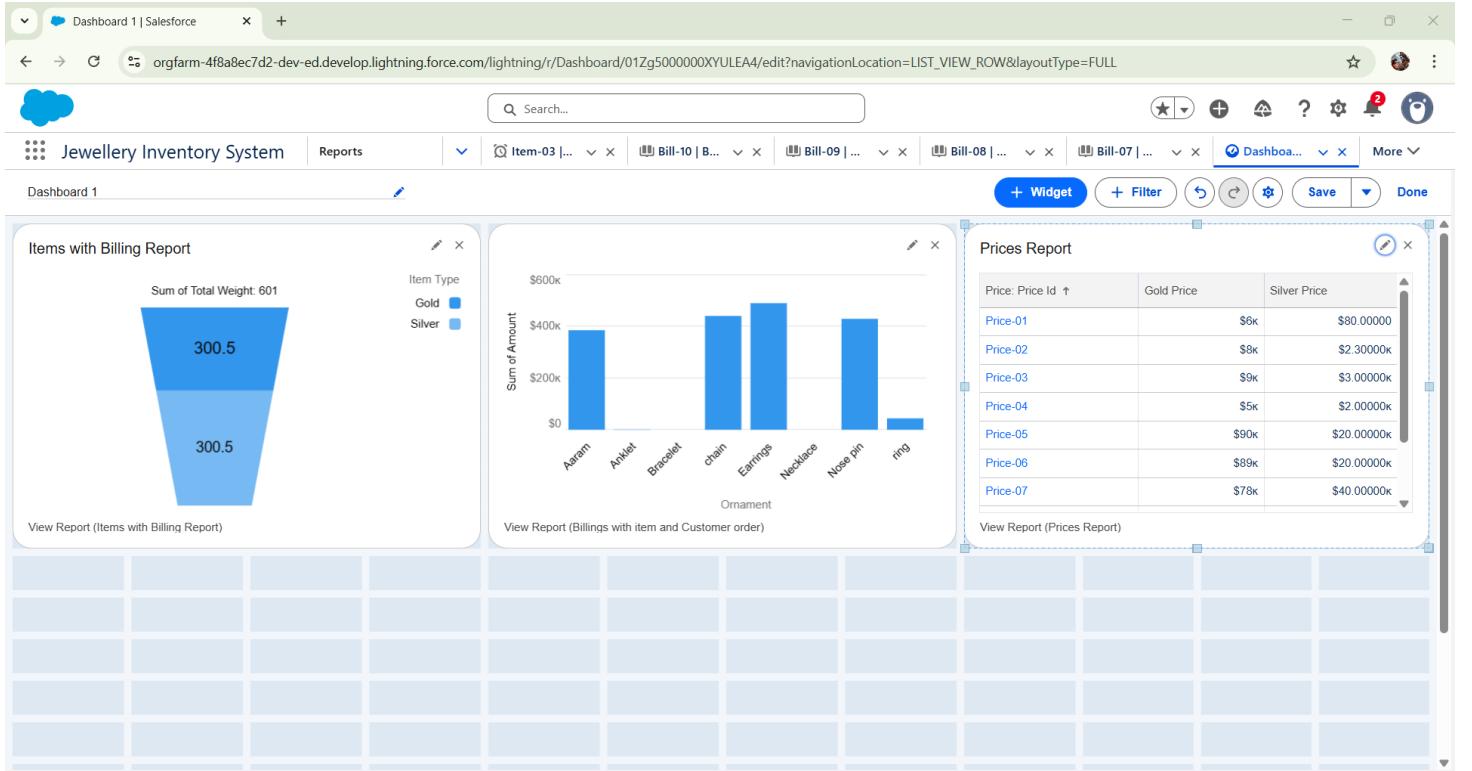
Reports give access to data.

The screenshot shows the Salesforce Reports page for the "Jewellery Inventory System". The left sidebar includes sections for Recent, Reports, Folders, and Favorites. The main content area displays a list of reports:

Report Name	Description	Folder	Created By	Created On	Subscribed
Prices Report		Public Reports	Priyadarshini S.	10/30/2025, 9:58 PM	
Billings with item and Customer order		Public Reports	Priyadarshini S.	10/30/2025, 11:33 PM	
Items with Billing Report		Public Reports	Priyadarshini S.	10/30/2025, 11:16 PM	
Billings with Item Report		Public Reports	Priyadarshini S.	10/30/2025, 11:19 PM	

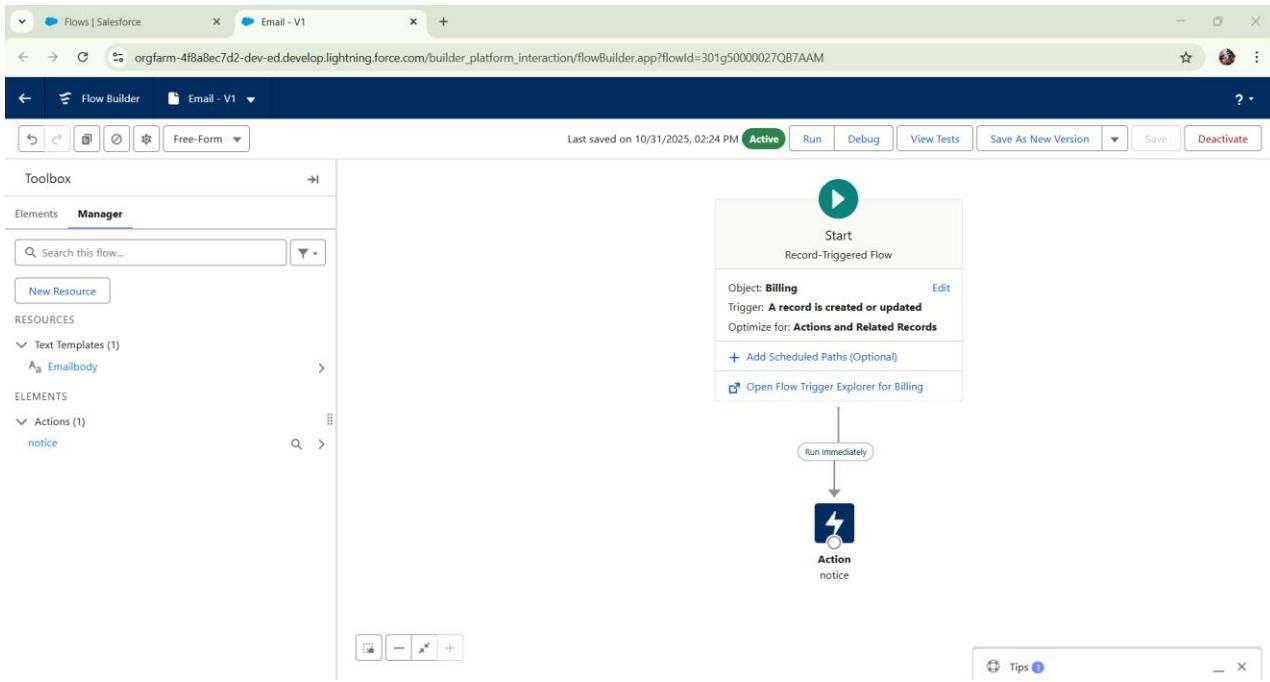
Dashboards:

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.

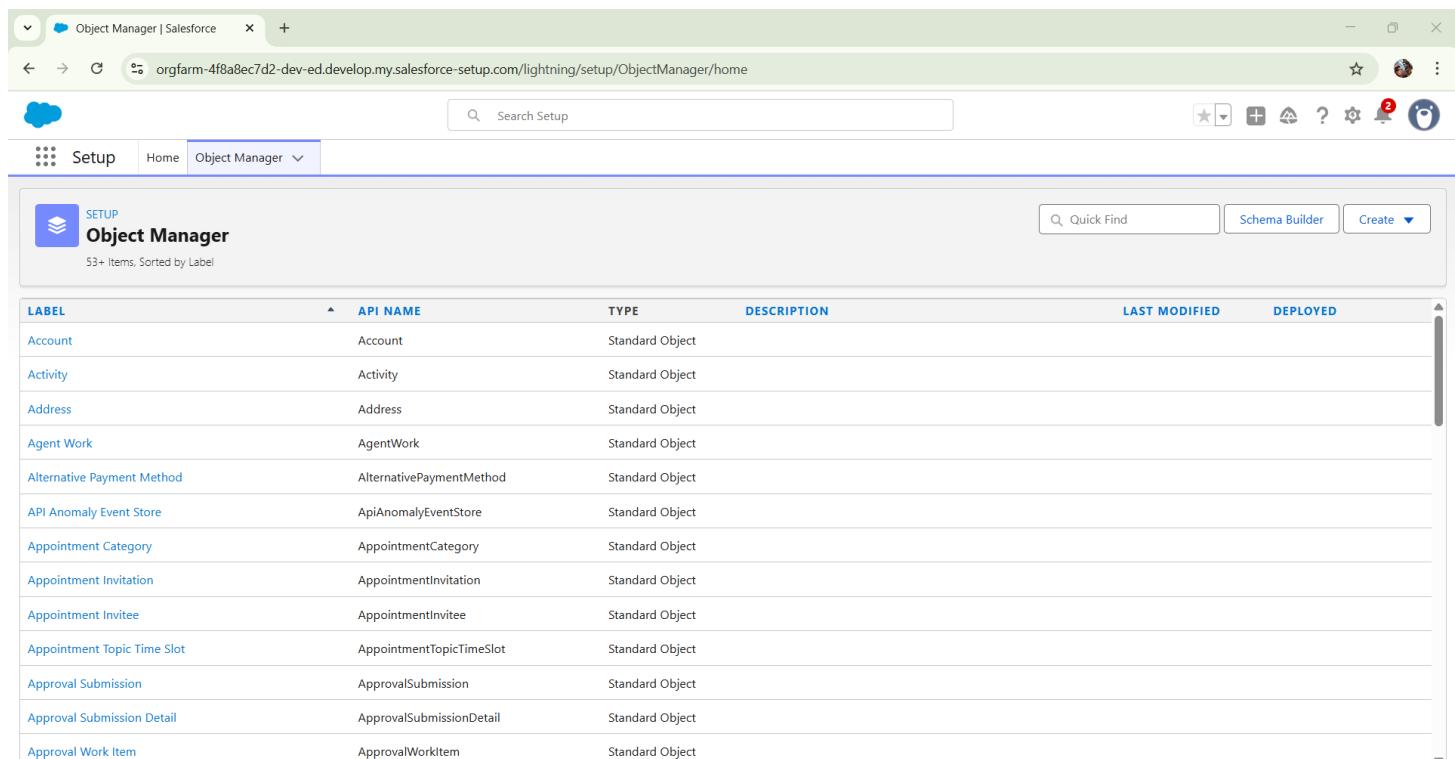
Step 1: Developer Account Setup

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. At the top, there's a navigation bar with tabs for 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' tab is selected. Below the navigation bar, the title 'Object Manager' is displayed along with a note '53+ Items, Sorted by Label'. There are buttons for 'Quick Find', 'Schema Builder', and 'Create'. The main area is a table listing various objects:

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

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected in the navigation bar. The main content area displays the 'Custom Object Tabs' section, which lists five custom tabs: 'Billings' (Books style), 'Customer Orders' (Alarm clock style), 'Items' (Alarm clock style), 'Jewel Customers' (Alarm clock style), and 'Prices' (Books style). Below this are sections for 'Web Tabs' (No Web Tabs have been defined) and 'Visualforce Tabs' (No Visualforce Tabs have been defined). The 'Lightning Component Tabs' section shows one tab: 'Get Started with Agentforce' (Heart style).

Step 4 : Lightning App Development

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

The screenshot shows the Salesforce App Manager interface with the 'Reports' tab selected in the navigation bar. The main content area displays a list of reports under the 'Recent' category. The reports listed are: 'Billings with item and Customer order' (Public Reports, Created by Priyadarshini S on 10/30/2025, 11:33 PM), 'Prices Report' (Public Reports, Created by Priyadarshini S on 10/30/2025, 9:58 PM), 'Items with Billing Report' (Public Reports, Created by Priyadarshini S on 10/30/2025, 11:16 PM), and 'Billings with Item Report' (Public Reports, Created by Priyadarshini S on 10/30/2025, 11:19 PM). On the left sidebar, there are sections for 'RECENT', 'REPORTS', 'FOLDERS', and 'FAVORITES'.

Step 5 : Fields

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

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-4f8a8ec7d2-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01g5000000CvNV/FieldsAndRelationships/view>. The page title is "Item". The left sidebar shows "FIELDS & RELATIONSHIPS" selected under "Item". The main content area displays a table titled "Fields & Relationships" with 24 items. The columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table includes rows for Amount, Billing, Created By, Customer Name, Expected Days Of Return, Gold Price, Item Name, Item Type, and KDM.

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)		

Step 6 : Profiles

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

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-4f8a8ec7d2-dev-ed.develop.my.salesforce-setup.com/lightning/setup/EnhancedProfiles/page?address=%2F00eg5000000249>. The page title is "Profile Detail" for "Gold Smith". The left sidebar shows "PROFILES" selected under "Users". The main content area displays the "Profile Detail" section with fields for Name, User License, Description, and Created By. It also shows the "Page Layouts" section, which lists various standard object layouts and their assignments.

Standard Object Layouts	Assignment	Location Group Assignment
Global	Global Layout [View Assignment]	Location Group Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Macro Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Object Milestone Layout [View Assignment]
Account	Account Layout [View Assignment]	Operating Hours Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Opportunity Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Opportunity Layout [View Assignment]

Step 6: Roles

A role in Salesforce defines a user's visibility access

The screenshot shows the Salesforce Setup interface with the 'Roles' tab selected. The main area displays the 'Creating the Role Hierarchy' section, which lists the organization's role hierarchy. The hierarchy includes roles like CEO, CFO, COO, Gold Smith, Worker, SVP Customer Service & Support, and various Customer Support and Installation & Repair Services roles. Each role entry has options to 'Edit', 'Delete', or 'Assign'. A sidebar on the left shows navigation links for Users, Roles, Feature Settings, Sales, Service, and Case Teams.

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The left sidebar shows navigation links for 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 area displays the 'Page Layouts' section, which lists three items: 'Item Layout', 'Page Layout for Gold', and 'Page Layout for Silver'. Each item shows the 'Created By' and 'Modified By' information, both listed as 'Priyadarshini S.' with specific dates and times.

Step 9: Record Types

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

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-4f8a8ec7d2-dev-ed.develop.my.salesforce.com/lightning/setup/ObjectManager/01lg5000000CvNIV/RecordTypes/view>. The page title is "Item | Salesforce". The left sidebar under "SETUP > OBJECT MANAGER" has "Record Types" selected. The main content area displays a table titled "Record Types" with two items:

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	Priyadarshini S, 10/29/2025, 2:02 AM
Silver	Silver items information	✓	Priyadarshini S, 10/29/2025, 2:05 AM

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

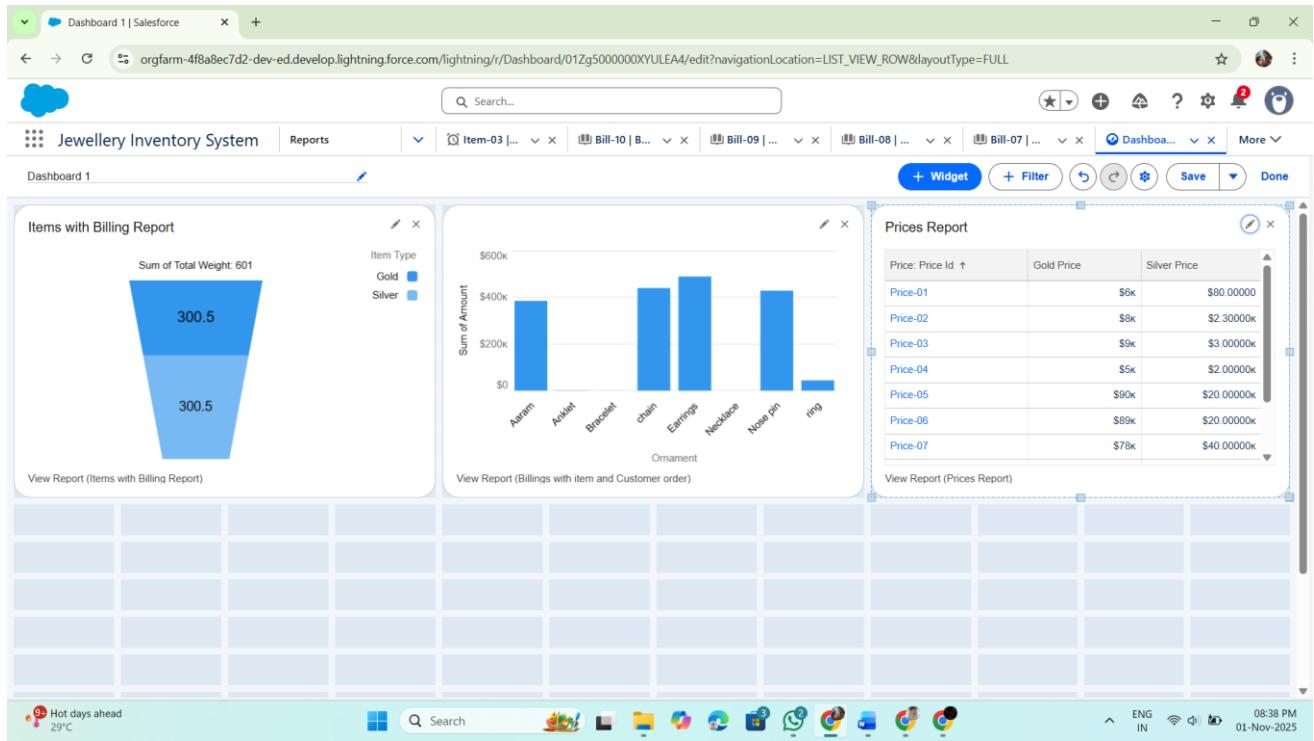
Admin will perform tasks like creating and editing users , rest passwords , granting permissions and data access

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.