

CRM Application for Jewel Management - (Developer)

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ABSTRACT

The CRM Application for Jewel Management is a Salesforce-based solution designed to streamline jewelry business operations, including customer management, inventory tracking, billing, and sales. By creating custom objects, fields, record types, and roles within Salesforce, the system provides an efficient, secure, and user-friendly platform. This project was developed as part of the B.Sc. Computer Science curriculum to gain hands-on experience in CRM application development and teamwork.

The Jewel inventory System is a comprehensive software Solution designed to Streamline and manage the inventory and sales processes of a jewelry store or a solution to track and control the inventory of various jewelry items, maintain accurate records, and facilitate seamless sales transactions

As a team We've learned

- Real Time Salesforce Project
- Data Modelling
- Creating an Application
- User Interface Customization
- Object & Relationship
- Field Dependencies
- Record Types
- Cross Object Formula
- Flows
- Reports & Dashboards
- Validation Rules
- Formula Fields

1.1 Project Overview

The Lease Management System is a Salesforce-based application designed to streamline the processes associated with leasing real estate properties. It handles tenant management, lease contracts, payments, and communication with automation features such as flows, approval processes, and email alerts.

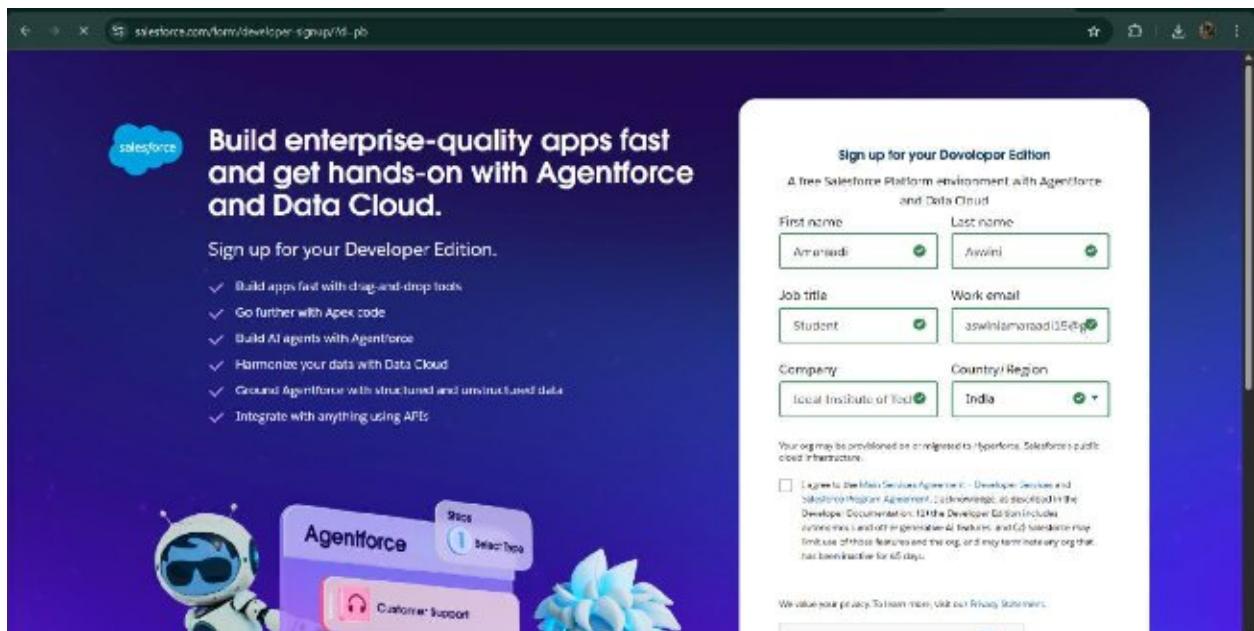
1.2 Purpose

A CRM application for jewel management helps developers streamline customer interactions, sales, and inventory specific to the jewelry business. It enables efficient tracking of customer preferences, orders, and service history. Developers use it to integrate secure payment systems, automate reminders, and manage stock and repairs. The goal is to deliver a tailored, feature-rich solution that enhances customer experience and operational efficiency.

DEVELOPMENT PHASE

Creating Developer Account:

By using this URL - <https://www.salesforce.com/form/developer-signup/?d=pb>



- Created objects: Jewel Customer, Item , Customer Order, Price,Billing

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected in the top navigation bar. The main title is 'SETUP > OBJECT MANAGER' followed by 'Price'. On the left, a sidebar lists various configuration options: 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, Object Access, Triggers, and Flow Triggers. The 'Fields & Relationships' option is currently selected. The main panel displays the 'Details' tab for the 'Price' object. It includes fields for Description, API Name (Price__c), Singular Label (Price), Plural Label (Prices), and several checkboxes for Reports, Activities, Field History, and Help Settings, all of which are checked. Deployment status is listed as 'Deployed'.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected in the top navigation bar. The main title is 'SETUP > OBJECT MANAGER' followed by 'Jewel Customer'. On the left, a sidebar lists various configuration options: 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, Object Access, Triggers, and Flow Triggers. The 'Fields & Relationships' option is currently selected. The main panel displays the 'Details' tab for the 'Jewel Customer' object. It includes fields for Description, API Name (Record_Name__c), Singular Label (Jewel Customer), Plural Label (Jewel Customers), and several checkboxes for Reports, Activities, Field History, and Help Settings, all of which are checked. Deployment status is listed as 'Deployed'.

Setup > Object Manager

Customer Order

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

Object Access

Triggers

Flow Triggers

Description

API Name: Customer_Order__c

Custom: ✓

Singular Label: Customer Order

Plural Label: Customer Orders

Enable Reports: ✓

Task Activities

Track Field History

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Edit Delete

<https://orionfarm-c00e0deeb-dev-ed.develop.lightning.force.com/home-one.app#/setup/ObjectManager/01lq000001pxv/PageLayouts/view>

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

Object Access

Triggers

Flow Triggers

Description

API Name: Item__c

Custom: ✓

Singular Label: Item

Plural Label: Items

Enable Reports: ✓

Task Activities

Track Field History

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Edit Delete

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

- Header:** Search Setup, Home, Object Manager, Billing.
- Left Sidebar (Object Manager):**
 - 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
 - Soaping Rules
 - Object Access
 - Triggers
 - Flow Triggers
- Central Content (Billing Details):**
 - Details** tab selected.
 - Description:** API Name: Billing__c, Custom: ✓, Single Label: Billing.
 - Buttons:** Edit, Delete.
 - Related Fields:** Double Reports, Track Activities, Track Field History.
 - Deployment Status:** Deployed.
 - Help Settings:** Standard salesforce.com Help Window.

- Creating a Custom Tab:

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external content. Lightning Component tabs allow you to add Lightning components to the navigation bar. This section shows you how to add tabs to your organization so you can begin adding them to your pages.

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

- Custom Object Tabs:** A section titled "Custom Object Tabs" with a "New" button (which is highlighted with a red box) and a "What Is This?" link. Below the title, it says "No Custom Object Tabs have been defined".
- Web Tabs:** A section titled "Web Tabs" with a "New" button and a "What Is This?" link. Below the title, it says "No Web Tabs have been defined".

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tab

Didn't find what you're looking for?
Try using Global Search.

Search Setup

SETUP Tabs

New Custom Object Tab

Step 1 of 3 Help for this Page

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

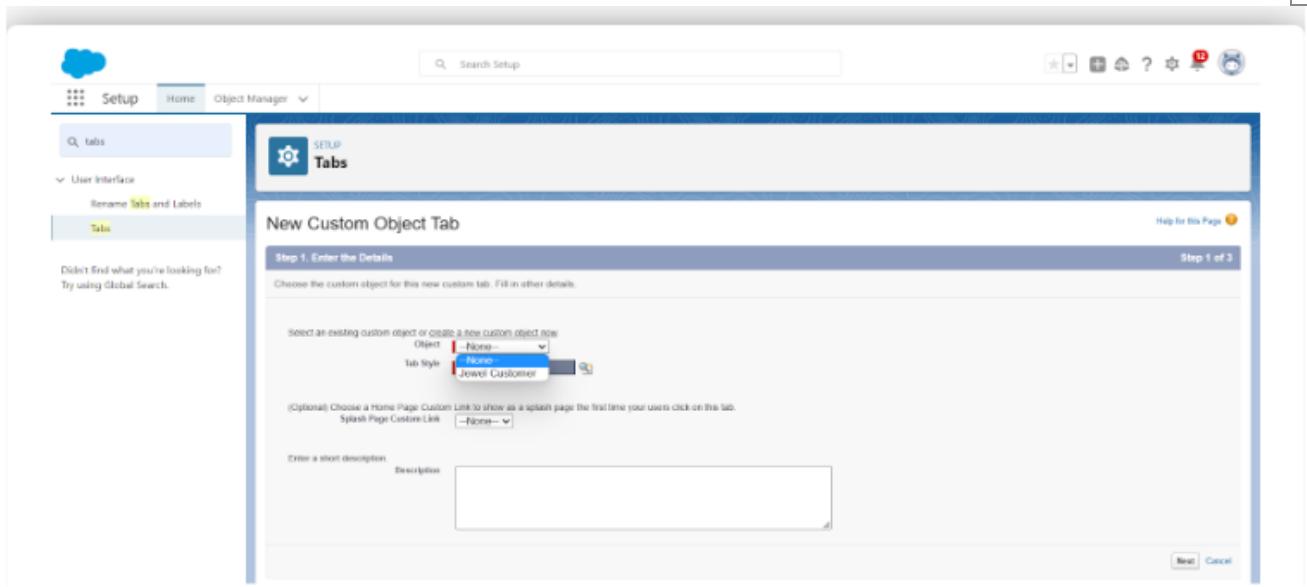
Jewel Customer

(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



Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tab

Didn't find what you're looking for?
Try using Global Search.

Search Setup

SETUP Tabs

Edit Custom Object Tab Items

Help for this Page

Fill in the fields below to define the custom tab.

Custom Tab Definition Edit

Custom Object Tab Information

Tab Label: home

Object: tabs

Tab Style: GRT TV

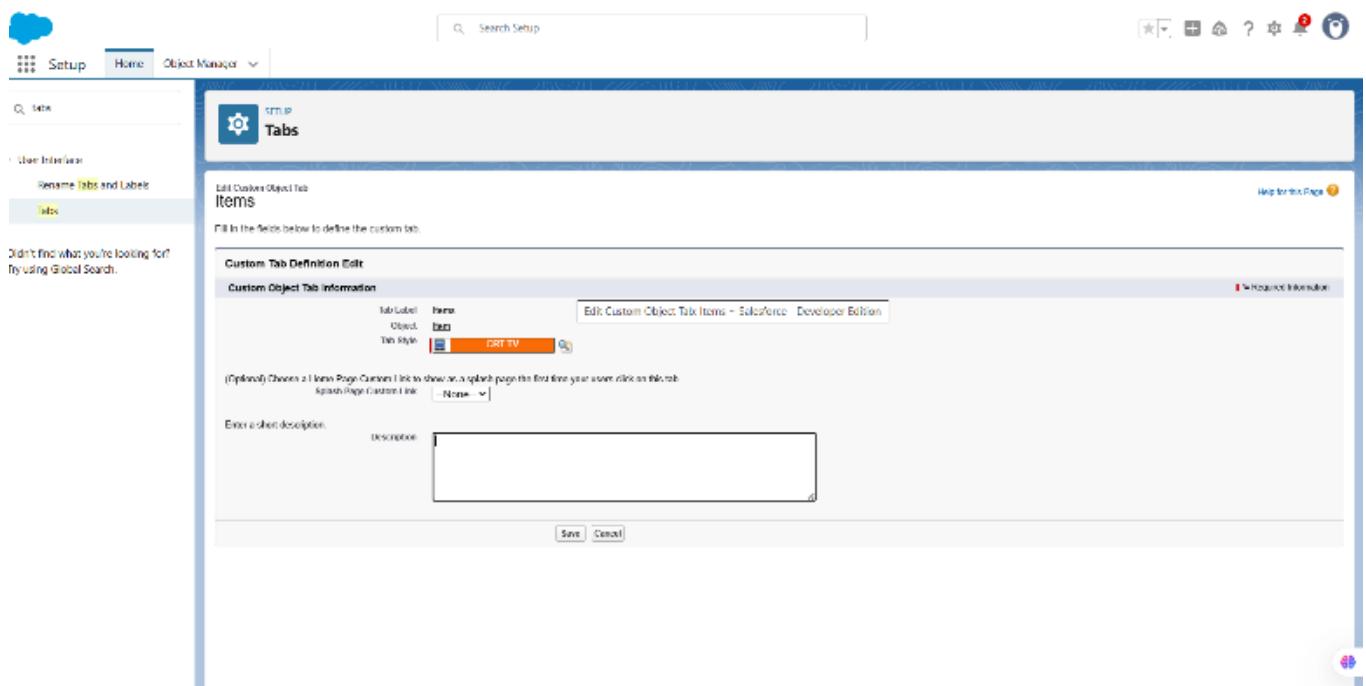
Edit Custom Object Tab Items - Salesforce Developer Edition

(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:

Save Cancel



Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Didn't find what you're looking for? Try using Global Search.

Action	Label	Tab Style	Description
Edit Del	Billings	Bottle	
Edit Del	Customer OrderS	Apple	
Edit Del	Items	CRT TV	
Edit Del	Jewel Customers	Lightning	
Edit Del	Prices	Red Cross	

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

• Developed Lightning App with relevant tabs

App Settings

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

App Name: Jewellery Inventory System

Developer Name: Jewellery Inventory System

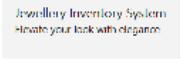
Description: Elevate your look with elegance

App Branding

Image:  Primary Color Hex Value: #0070C0

Org Home Options: Use the app's image and color instead of the org's custom theme

App Launcher Preview



App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

- Type to filter list...
- Navigation Rules
- User Profiles
- Navigation Items
- Amounts
- Activation Targets
- Activations
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests
- Approval Submission Details
- Approval Submissions
- Approval Workitems
- Asset Action Sources

Selected Items

- Jewel Customers
- Items
- Customer Orders
- Prices
- Billings
- Reports
- Dashboards

Delete ▾

Selected Items

- Jewel Customers
- Items
- Customer Orders
- Prices
- Billings
- Reports
- Dashboards

Selected Items

- Jewel Customers
- Items
- Customer Orders
- Prices
- Billings
- Reports
- Dashboards

Selected Items

[cancel] [void()]

← Lightning App Builder

App Settings

Pages Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

User Profiles

Navigation Rules
Navigation Rules

Navigation rules determine whether to open a related record in addition to the primary record.

Items
***Items open as**
 Workspace tabs

 Switches off

Customer Orders
Billings

Customer Name (Record_Name__c)

[cancel] [void()]

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

Navigation Rules

User Profiles

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Available Profiles	
<input type="text"/> Type to filter list...	
Analytics Cloud Integration User	▶
Analytics Cloud Security User	◀
Anypoint Integration	▶
Authenticated Website	◀
Authenticated Website	▶
B2B Reordering Portal Buyer Profile	◀
Contract Manager	▶
Custom: Marketing Profile	◀
Custom: Sales Profile	▶
Custom: Support Profile	◀
Customer Community Login User	▶
Customer Community Plus Login User	◀
Customer Community Plus User	▶
Customer Community User	◀

Selected Profiles

Selected Profiles
System Administrator
Gold Smith

Creating Lookup Relationship:

The screenshot shows the Salesforce Object Manager interface for the 'Customer Order' object. The left sidebar lists various configuration options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main content area displays the 'Fields & Relationships' section, which lists the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City_c	Text(20)		
Created By	CreatedById	Lookup(User)		
Customer	Customer_c	Lookup(Jewel Customer)		✓
Customer Order	Name	Auto Number		✓
Item	Item_c	Master-Detail(Item)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Order Status	Order_Status_c	Picklist		

The screenshot shows the Salesforce Object Manager interface for the 'Jewel Customer' object. The left sidebar lists various configuration options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main content area displays the 'Fields & Relationships' section, which lists the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Text(20)		
City	City_c	Text(20)		
Country	Country_c	Text(10)		
Created By	CreatedById	Lookup(User)		
Customer Name	Customer_Name_c	Text(20)		
Customer Name	Name	Text(20)		✓
Email	Email_c	Email		
Expected Days Of Return	Expected_Days_OF_Return_c	Picklist		
Gold Plan	Gold_Plan_c	Text(20)		
KDM	KDM_c	Text(20)		
Last Modified By	LastModifiedById	Lookup(User)		
Making Changes	Making_Changes_c	Text(20)		

Jewel Customer

New Custom Field

Step 2: Enter the details

Field Label: Field Name: Description:

Help Text:

Required: Always require a value in this field in order to save a record.

Auto-add to custom report type: Add this field to existing custom report type that contains this entry.

Default Value:

Help for this page

Previous Next Cancel

Jewel Customer

Custom Field Definition Edit

Field Information

Field Label: Field Name: Description:

Help Text:

Type: Field Usage: Data Synchronicity:

Compliance Category: Available: Chosen:

General Options

Required: Always require a value in this field in order to save a record.

Unique: Do not allow duplicate values.

External ID: Set this field as the unique record identifier from an external system.

Default Value:

Help for this page

Setup > Object Manager

Item

New Custom Field

Step 2: Choose output type

Field Label: Gold price Field Name: Gold_price

Add this field to existing custom report types that contain this entry

Formula Return Type:

None Selected Select one of the data types below:

- Checkbox
- Currency
- Date
- DateTime
- Number

Calculator: Boolean value
Example: [1000] > Checkbox

Calculator: A dollar or other currency amount and automatically format the field as a currency amount.
Example: [Gross Margin Amount] -> Currency

Calculator: A date, for example, by adding or subtracting days to other dates.
Example: [Recorded Date] +> Date

Calculator: A datetime, for example, by adding a number of hours or days to another datetime.
Example: [Next : 10W] +> DateTime

Calculator: A numeric value.
Example: [Fahrenheit] * 10 > Number

Help for this Page

Setup > Object Manager

Item

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula tab to use additional fields, operators, and functions.

Example: Gross Margin Amount - Cost_c | More Examples...

Single Formula Advanced Formula

Insert Field Insert Operator

Gold_Price__c =
Prices__r.Gold_price_c / 10

Operators & Functions

- All Function Categories -

ABS
ACOS
AUMONTHS
AND
ASCII
ASIN

Insert Selected Function

Setup Home Object Manager

Item

SETUP > OBJECT MANAGER

Field Information

Field Label	Priority	Object Name	Item
Field Name	Priority	Data Type	Picklist
API Name	Priority_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	meghana.katoju	Modified By	meghana.katoju
	7/1/2023, 10:55 PM		7/1/2023, 10:55 PM

General Options

Required	<input type="checkbox"/>
Default Value	<input type="text"/>

Picklist Options

Restrict picklist to the values defined in the value set	<input checked="" type="checkbox"/>
Controlling Field	[New]

Picklist Values Used

Active and inactive picklist values	4 (1,000 max)
-------------------------------------	---------------

Field Dependencies → New

Field Dependencies Help ?

Setup Home Object Manager

Item

SETUP > OBJECT MANAGER

Fields & Relationships

Controlling Field: Priority
Dependent Field: Expected days of Return

Instructions

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Legend —

Excluded Value
Included Value

Click button to include or exclude selected values from the dependent picklist:

Priority:

Low	Medium	High	Critical
1-3 Days	1-3 Days	1-3 Days	1-3 Days
4-5 Days	4-5 Days	4-5 Days	4-5 Days
6-7 Days	6-7 Days	6-7 Days	6-7 Days
8-10 Days	8-10 Days	8-10 Days	8-10 Days

Showing Columns: 1 - 4 (of 4) < Previous | Next > View All Go to

Expected days of Return:

Low	Medium	High	Critical
1-3 Days	1-3 Days	1-3 Days	1-3 Days
4-5 Days	4-5 Days	4-5 Days	4-5 Days
6-7 Days	6-7 Days	6-7 Days	6-7 Days
8-10 Days	8-10 Days	8-10 Days	8-10 Days

Showing Columns: 1 - 4 (of 4) < Previous | Next > View All

Click button to include or exclude selected values from the dependent picklist:

Save Cancel Preview

SETUP > OBJECT MANAGER
Jewel Customer

Object and by again.

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules

Validation Rule Edit

Rule Name: **Postal Code**
Active:
Description:

Error Condition Formula

Example: `Discount_Percent_c>0.30` [More Examples...](#)
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area

Functions

- All Function Categories -
- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign

Check Syntax No errors found [Help on this function](#)

Error Message

Example: `Discount percent cannot exceed 30%`
This message will appear when Error Condition formula is true

Error Message: **Must contain 6 digits**

This error message can either appear at the top of the page or below a specific field on the page

Error Location: Top of Page Field: **Zip/Postal code**

Save Save & New Cancel

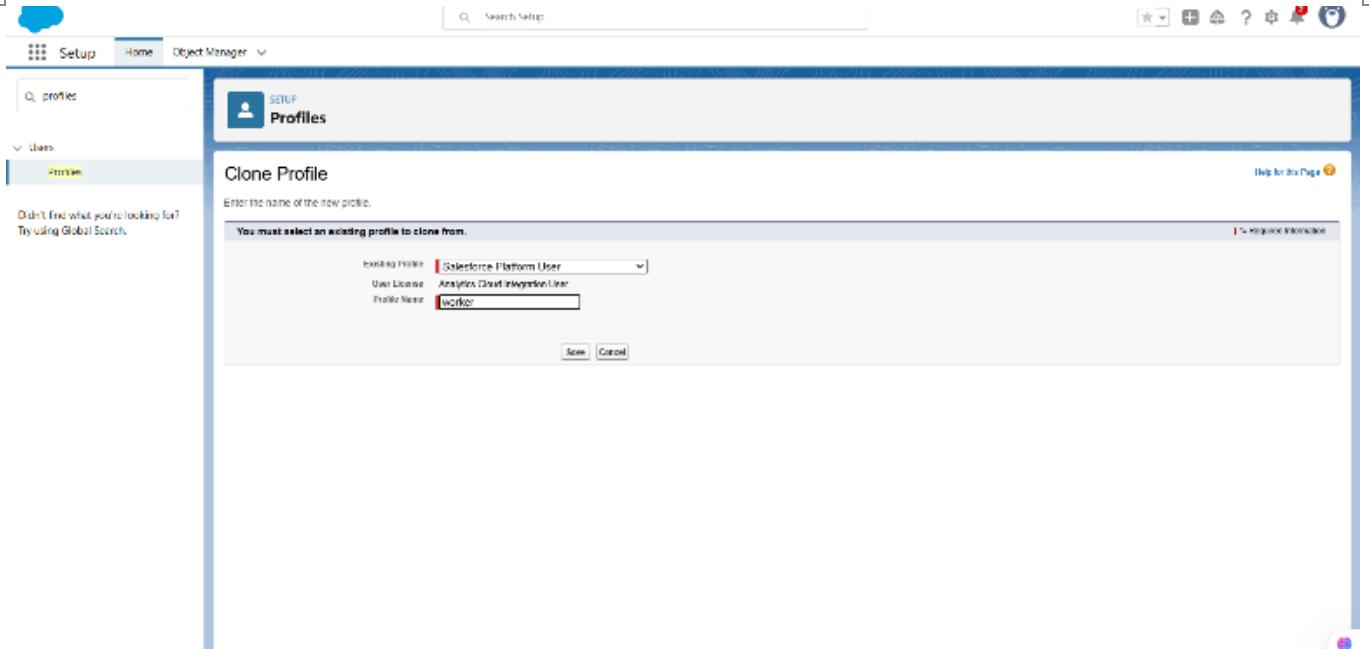
To create a new profile:

The screenshot shows the Salesforce Setup interface. The left sidebar is titled "Setup" and includes sections for Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, Users, Permission Set Groups, Permission Sets, Profiles (which is selected), and Public Groups. The main content area is titled "Profiles" and "Clone Profile". It instructs the user to "Enter the name of the new profile." Below this, a message says "You must select an existing profile to clone from." A dropdown menu labeled "Existing Profile" has "System Administrator" selected. Under "User License", "Salesforce" is chosen. The "Profile Name" field contains "Gold Smith". At the bottom are "Save" and "Cancel" buttons.

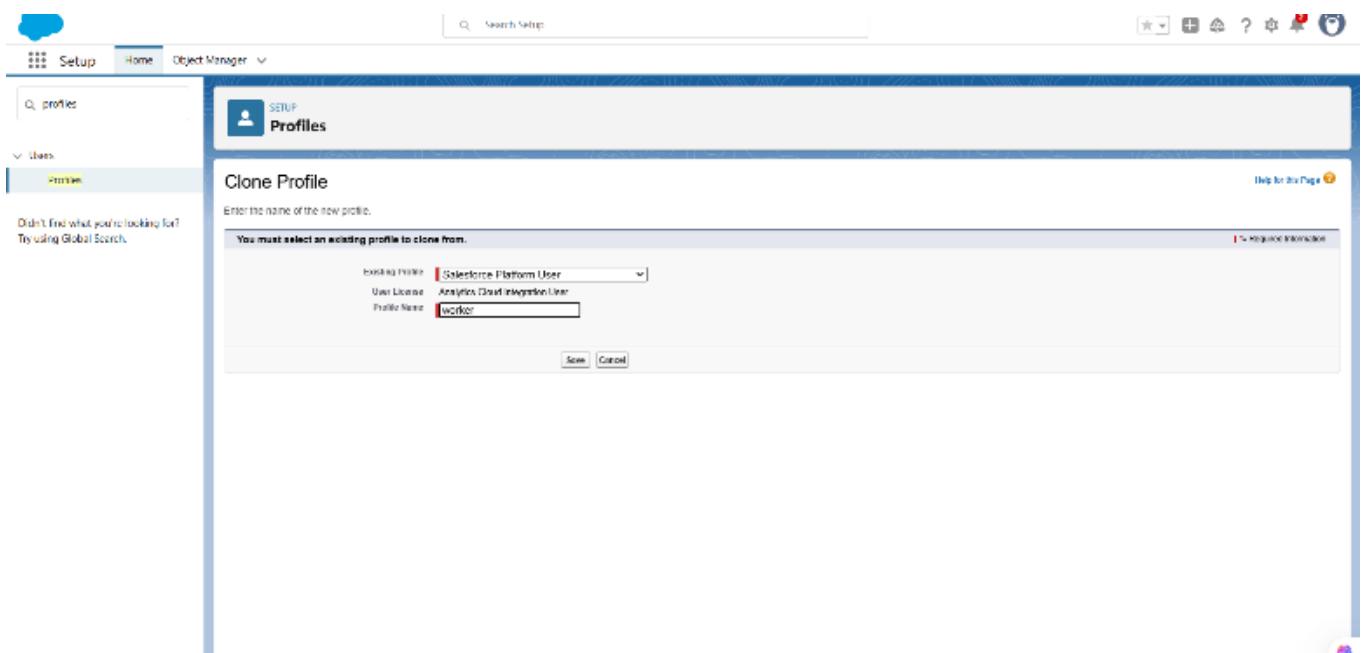
The screenshot shows the "Custom Object Permissions" section of the Profiles setup. It displays two tables of permissions for various custom objects. The first table is for "Assets" and the second is for "Job Applications". Rows include Assets, Asset Services, Billings, Book1, Book2, Bot Commands, Brokers, Buyers, Candidates, Customer Orders, Items, Jewel Customers, Job Applications, Job Postings, Job Posting Sites, Positions, Prices, Projects, ProjectTasks, and Properties. Each row has columns for Basic Access (Read, Create, Edit, Delete) and Data Administration (View All, Modify All). The "Billings", "Customer Orders", "Items", "Jewel Customers", "Prices", and "Customer Orders" rows are highlighted with red boxes around their respective columns.

Object	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Assets	<input type="checkbox"/>					
Asset Services	<input type="checkbox"/>					
Billings	<input checked="" type="checkbox"/>					
Book1	<input type="checkbox"/>					
Book2	<input type="checkbox"/>					
Bot Commands	<input type="checkbox"/>					
Brokers	<input type="checkbox"/>					
Buyers	<input type="checkbox"/>					
Candidates	<input type="checkbox"/>					
Customer Orders	<input checked="" type="checkbox"/>					
Object	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Items	<input checked="" type="checkbox"/>					
Jewel Customers	<input checked="" type="checkbox"/>					
Job Applications	<input type="checkbox"/>					
Job Postings	<input type="checkbox"/>					
Job Posting Sites	<input type="checkbox"/>					
Positions	<input type="checkbox"/>					
Prices	<input checked="" type="checkbox"/>					
Projects	<input type="checkbox"/>					
ProjectTasks	<input type="checkbox"/>					
Properties	<input type="checkbox"/>					

To create a new worker profile:



Creating Gold Smith Role:



Create role as Worker:

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

- Meghana**
 - Add Role
 - CEO** [Edit](#) | [Delete](#) | [Assign](#)
 - Add Role
 - CFO** [Edit](#) | [Delete](#) | [Assign](#)
 - Add Role
 - COO** [Edit](#) | [Delete](#) | [Assign](#)
 - Add Role
 - Gold Smith** [Edit](#) | [Delete](#) | [Assign](#)
 - Add Role
 - Worker** [Edit](#) | [Delete](#) | [Assign](#)
 - Add Role
- HR** [Edit](#) | [Delete](#) | [Assign](#)
 - Add Role
- Manager** [Edit](#) | [Delete](#) | [Assign](#)
 - Add Role
- SVP, Customer Service & Support** [Edit](#) | [Delete](#) | [Assign](#)
 - Add Role
- SVP, Human Resources** [Edit](#) | [Delete](#) | [Assign](#)
 - Add Role

[Show in tree view](#)

Create User:

The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar is titled 'SETUP' and includes sections for 'Users' (selected), 'Feature Settings', 'Data.com', and 'Prospector Users'. The main area is titled 'User Edit' for 'Niklaus Mikaelson'. The 'General Information' section contains fields for First Name (Niklaus), Last Name (Mikaelson), Alias (nmika), Email (nadem@thesmartbridge.co), Username (nicklaus@nick.org), Nickname (nicklaus), Title, Company, Department, and Division. On the right, there are dropdown menus for 'Role' (set to Gold Smith), 'User License' (Salesforce), 'Profile' (Gold Smith), and 'Active' (checked). Below these are various user settings like Marketing User, Offline User, Knowledge User, etc., with 'Role' and 'Profile' highlighted with a red box.

To Create a Gold Page layout:

The screenshot shows the Salesforce Setup interface for managing page layouts. The left sidebar is titled 'SETUP > OBJECT MANAGER' and includes sections for 'Item' (selected), 'Fields & Relationships', 'Page Layouts' (selected), and 'Lightning Record Pages'. The main area is titled 'Page Layouts' and shows a table with one item: 'Item Layout' created by 'meghana katoju' on 6/29/2023 at 10:48 PM. A 'New' button is highlighted with a red box in the top right corner.

Setup Home Object Manager

SETUP > OBJECT MANAGER Item

Create New Page Layout

As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names are translated for your international users.

Existing Page Layout: Item Layout
Page Layout Name: Page Layout for Gold

Save Cancel

Help for this Page

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields Quick Find Field Name

	Customer Name	Item Type	Ornament	Priority	Silver price	Weight
Section	Expected days of ...	KDM	Owner	Purity	Stone/other price	
Blank Space	Gold price	Last Modified By	Percentage	Purity Gold price	Label: Purity	
Amount	Created By	Item Id	Making Charges	Prices	Name: Purity	
					Type Number	
					Length 2	
					Decimal Places: 0	

This item is currently in use (click to locate)

Information (Header visible on edit only.)

Item Id	GEN-2004-001234	Priority	Sample Text
Customer Name	Sample Text	Expected days of Return	Sample Text
Prices	Sample Text		
Item Type	Sample Text		
Ornament	Sample Text		
Gold price	₹123.45		
Purity Gold price	₹123.45		
Weight	0.00262		
Purity	46		
Percentage	25		
Stone weight	0.80909		
Total weight	92.398		
Stone/other price	₹123.45		
Amount	₹123.45		
KDM	₹123.45		
Making Charges	₹123.45		

To Create a Silver Page layout:

The screenshot shows the Salesforce Setup interface for managing object layouts. The 'Item' object is selected. The 'Page Layouts' tab is active. A red box highlights the 'Information' section of the layout editor, which contains fields like Customer Name, Price, and Weight.

To create a Record Type:

The screenshot shows the Salesforce Setup interface for managing record types. The 'Item' object is selected. The 'Record Types' tab is active. A red arrow points to the 'Record Types' button in the left sidebar.

The screenshot shows the Salesforce Setup interface for managing record types. The 'Item' object is selected. The 'Record Types' tab is active. A red box highlights the 'Edit Record Type' section for 'Gold', showing fields like Record Type Label and Description.

Profile Name	Record Types Currently Available	<input type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Analytics Cloud Integration User		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter External User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter Free User		<input type="checkbox"/>	<input type="checkbox"/>

Cloud icon

Search Setup

Setup | Home | Object Manager ▾

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

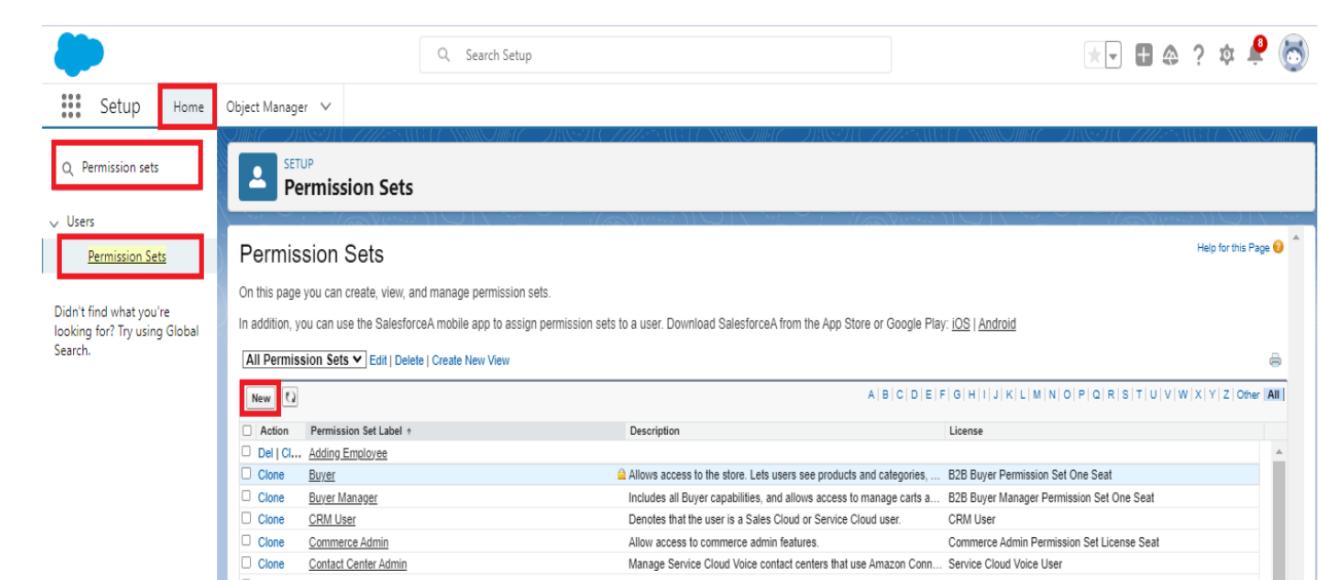
Scoping Rules

Record Type	Description	<input checked="" type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Customer Portal Manager Standard		<input type="checkbox"/>	<input type="checkbox"/>
External Apps Login User		<input type="checkbox"/>	<input type="checkbox"/>
External Identity User		<input type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
Gold smith	Gold (Default), Silver	<input checked="" type="checkbox"/>	<input type="checkbox"/>
High Volume Customer Portal		<input type="checkbox"/>	<input type="checkbox"/>
High Volume Customer Portal User		<input type="checkbox"/>	<input type="checkbox"/>
HR	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
HR Recruiter	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
Identity User	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
J Worker1	Gold (Default), Silver	<input checked="" type="checkbox"/>	<input type="checkbox"/>
J Worker2	Gold (Default), Silver	<input checked="" type="checkbox"/>	<input type="checkbox"/>
J WORKER3	Gold (Default), Silver	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Manager	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
Marketing User	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	Gold (Default), Silver	<input type="checkbox"/>	<input type="checkbox"/>

Force.com - Free User	Item Layout ▾
Gold Partner User	Item Layout ▾
Gold smith	Page layout for Gold ▾
High Volume Customer Portal	Item Layout ▾
High Volume Customer Portal User	Item Layout ▾
HR	Item Layout ▾
HR Recruiter	Item Layout ▾
Identity User	Item Layout ▾
Manager	Item Layout ▾
Marketing User	Item Layout ▾
Minimum Access - Salesforce	Item Layout ▾
Partner App Subscription User	Item Layout ▾
Partner Community Login User	Item Layout ▾
Partner Community User	Item Layout ▾
Read Only	Item Layout ▾
s1	Item Layout ▾
Salesforce API Only System Integrations	Item Layout ▾
Sales User	Item Layout ▾
Sales User.	Item Layout ▾
Silver Partner User	Item Layout ▾
Solution Manager	Item Layout ▾
Standard Platform User	Item Layout ▾
Standard User	Item Layout ▾

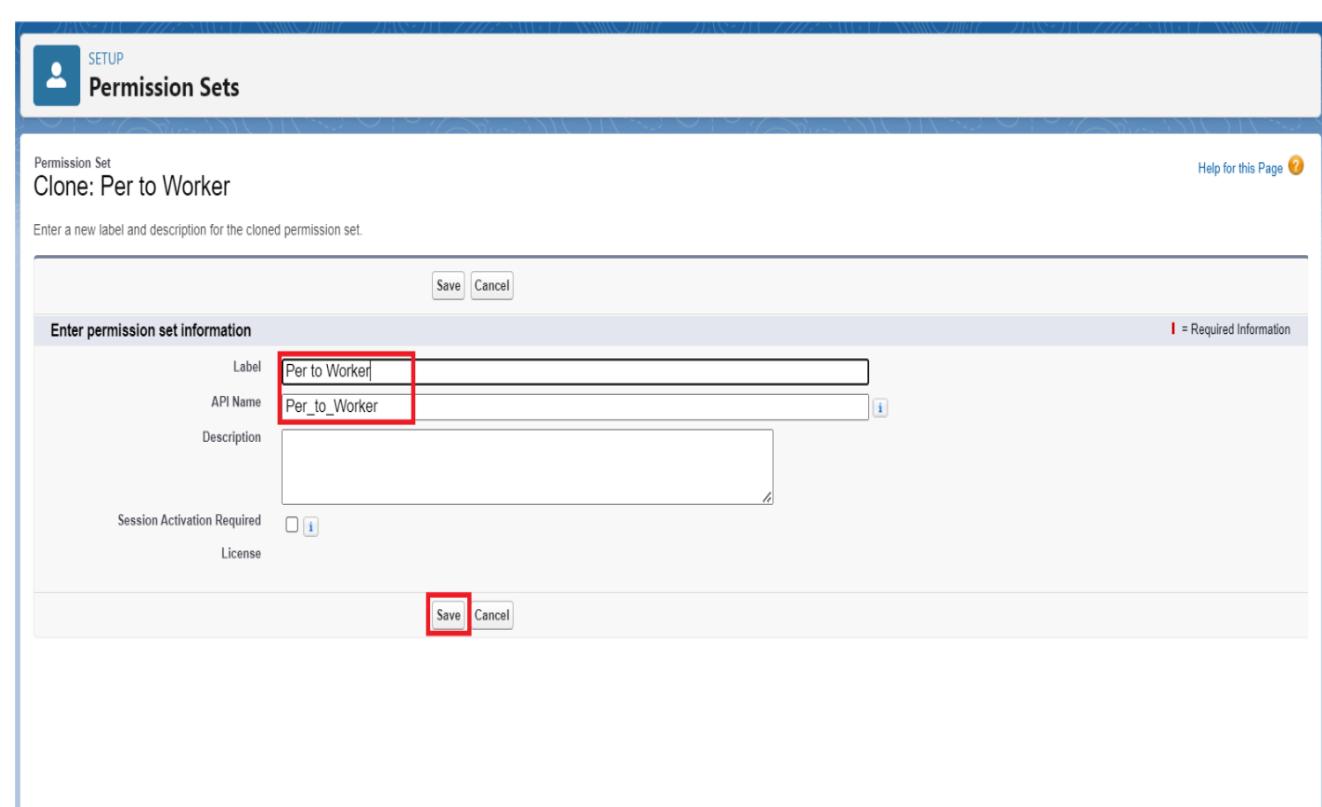
HR	Item Layout ▾
HR Recruiter	Item Layout ▾
Identity User	Item Layout ▾
Manager	Item Layout ▾
Marketing User	Item Layout ▾
Minimum Access - Salesforce	Item Layout ▾
Partner App Subscription User	Item Layout ▾
Partner Community Login User	Item Layout ▾
Partner Community User	Item Layout ▾
Read Only	Item Layout ▾
s1	Item Layout ▾
Salesforce API Only System Integrations	Item Layout ▾
Sales User	Item Layout ▾
Sales User.	Item Layout ▾
Silver Partner User	Item Layout ▾
Solution Manager	Item Layout ▾
Standard Platform User	Item Layout ▾
Standard User	Item Layout ▾
Support User	Item Layout ▾
Support User.	Item Layout ▾
System Administrator	Item Layout ▾
Work.com Only User	Item Layout ▾
Worker	Page layout for Gold ▾

Creating permission set:



The screenshot shows the Salesforce Setup interface. The left sidebar has 'Permission sets' and 'Permission Sets' highlighted with red boxes. The main content area is titled 'Permission Sets' and contains a table of existing permission sets. A 'New' button is highlighted with a red box. The table columns are Action, Permission Set Label, Description, and License.

Action	Permission Set Label	Description	License
<input type="checkbox"/> Del Cl...	Adding Employee	Allows access to the store. Lets users see products and categories, ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer	Includes all Buyer capabilities, and allows access to manage carts a...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/> Clone	CRM User	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/> Clone	Commerce Admin	Manage Service Cloud Voice contact centers that use Amazon Conn...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Admin	Access agent features in Service Cloud Voice contact centers that u...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent		



The screenshot shows the 'Clone: Per to Worker' dialog. It contains fields for 'Label' (Per to Worker) and 'API Name' (Per_to_Worker), both of which are highlighted with red boxes. There is also a 'Description' field and a 'Session Activation Required' checkbox. At the bottom are 'Save' and 'Cancel' buttons, with 'Save' highlighted with a red box.

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

Object Settings

Permissions to access objects and fields, and settings such as tab availability

App Permissions

Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access

Permissions to execute Apex classes

Visualforce Page Access

Permissions to execute Visualforce pages

External Data Source Access

Permissions to authenticate against external data sources

Flow Access

Permissions to execute Flows

Named Credential Access

Permissions to authenticate against named credentials

Custom Permissions

Permissions to access custom processes and apps

Custom Metadata Types

Permissions to access custom metadata types

Custom Setting Definitions

SETUP

Permission Sets

Permission Set Overview > Object Settings ▾ Items ▾

Items Save Cancel

Tab Settings

Available	Visible
<input checked="" type="checkbox"/>	<input type="checkbox"/> i

Item: Record Type Assignments

Record Types	Assigned Record Types
Gold	<input checked="" type="checkbox"/>
Silver	<input checked="" type="checkbox"/>

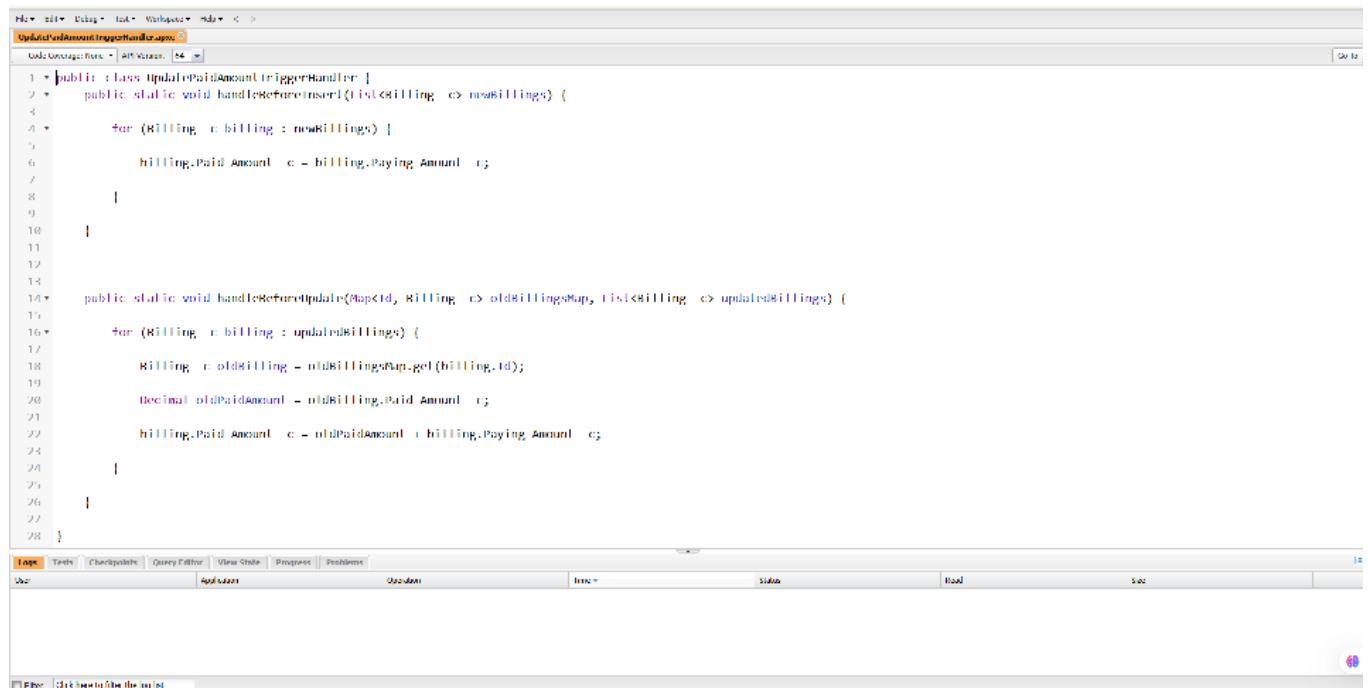
Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

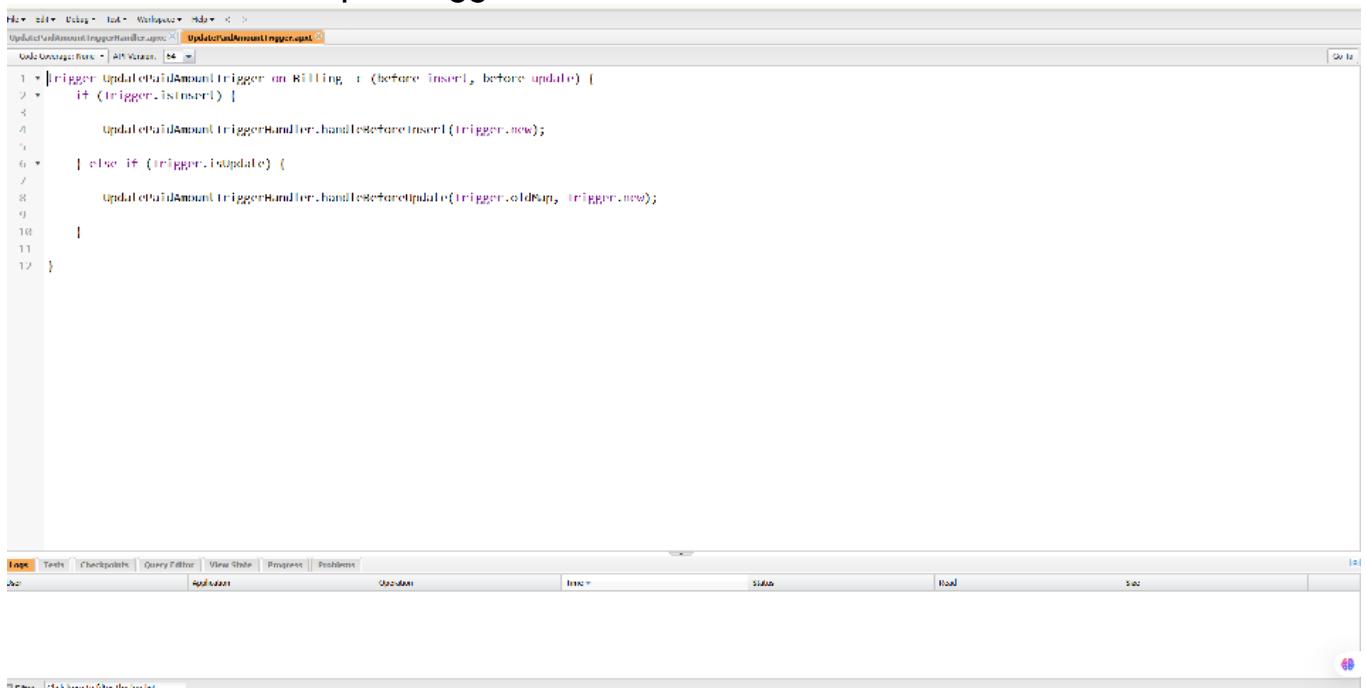
● Apex Trigger :

Create an Apex Trigger class:



```
1 * public class UpdatePaidAmountTriggerHandler {
2 *     public static void handleBeforeInsert(List<Billing> newListings) {
3 *
4 *         for (Billing__c billing : newListings) {
5 *
6 *             billing.Paid_Amount__c = billing.Paying_Amount__c;
7 *
8 *         }
9 *
10    }
11
12
13
14    public static void handleBeforeUpdate(Map<Id, Billing> oldBillingsMap, List<Billing> updatedBillings) {
15
16        for (Billing__c billing : updatedBillings) {
17
18            Billing__c oldBilling = oldBillingsMap.get(billing.Id);
19
20            decimal oldPaidAmount = oldBilling.Paid_Amount__c;
21
22            billing.Paid_Amount__c = oldPaidAmount + billing.Paying_Amount__c;
23
24        }
25
26    }
27
28 }
```

Create an Apex Trigger :



```
1 * trigger updatePaidAmount on Billing__c (before insert, before update) {
2 *     if (trigger.isinsert) {
3 *
4 *         updatePaidAmount triggerHandler.handleBeforeInsert(trigger.new);
5 *
6 *     } else if (trigger.isupdate) {
7 *
8 *         updatePaidAmount triggerHandler.handleBeforeUpdate(trigger.oldMap, trigger.new);
9 *
10    }
11
12 }
```

Create a Jewelry Inventory System:

Screenshot of a web-based application interface showing a sidebar menu and a main content area.

Left Sidebar:

- Jewellery Inventory ...** (Recent Activity)
- Recently Viewed** (Customer Name):
 - 1 jka
 - 2 nth
 - 3 myna
 - 4 dnu
 - 5 hdhyt
 - 6 lnn
 - 7 jmn
 - 8 mchit
 - 9 voinne
 - 10 krish
 - 11 Hawanson

Right Sidebar:

- Items
- Customer Orders
- Prices
- Settings
- Reports
- Dashboards
- Edit

Top Bar:

- Search...
- Dashboard
- Recently Viewed
- Dashboard2
- Grid View
- Change Owner
- Assign Label

Screenshot of the Salesforce Setup Home page.

Left Sidebar (App Launcher):

- Setup
- Home
- Object Manager
- App Launcher
- Jewellery Inventory System
- Items
- Jewel Customers
- View All
- Hyperedge Assistant
- Release Updates
- Salesforce Main App
- Lightning Usage
- Optimizer
- Sales Cloud Everywhere
- ADMINISTRATION
- Users
- Data
- Email
- API & CRM (SOQL)
- Subscription Management
- Apps
- Feature Settings
- Slack

Home Page Content:

- Get Started with Einstein Bots**: Launch an AI-powered bot to automate your digital connections. [Watch Video](#) [Let's Go](#)
- Mobile Publisher**: Use the Mobile Publisher to create your own branded mobile app. [Get Started](#) [Learn More](#)
- Join the Trailblazer Community**: Get help, learn and collaborate with fellow customers. [Join Now](#)

Most Recently Used:

NAME	TYPE	OBJECT
Email	Custom Field Definition	InventCustomer
Items	Custom Tab Definition	Item
UpdateIsInAccountTrigger	Apex Trigger	Billing
UpdateIsInAccountTriggerHandler	Apex Class	
NFX_ErrorDetails	Debug Level	

Jewellery Inventory ... Jewel Customers Item-05 | Customer ... Dashboard Broadly Viewed ... Recently Viewed ... Email Flow ... Home | Jewel ...

Jewel Customer Elavarasan

New Contact Edit New Opportunity

Related	Details
Customer Name	Flowersen
City	chennai
Phone	(63) 385-7897
Email	elavarasan2103@gmail.com
State	tamilnadu
Street	12/23 childrens park
Country	India
Zip/Postal code	641652
Amount	870
Customer Name	gobika
Gold Price	27000
Ornament	2500

Create Report:

Jewelry Inventory S... Reports

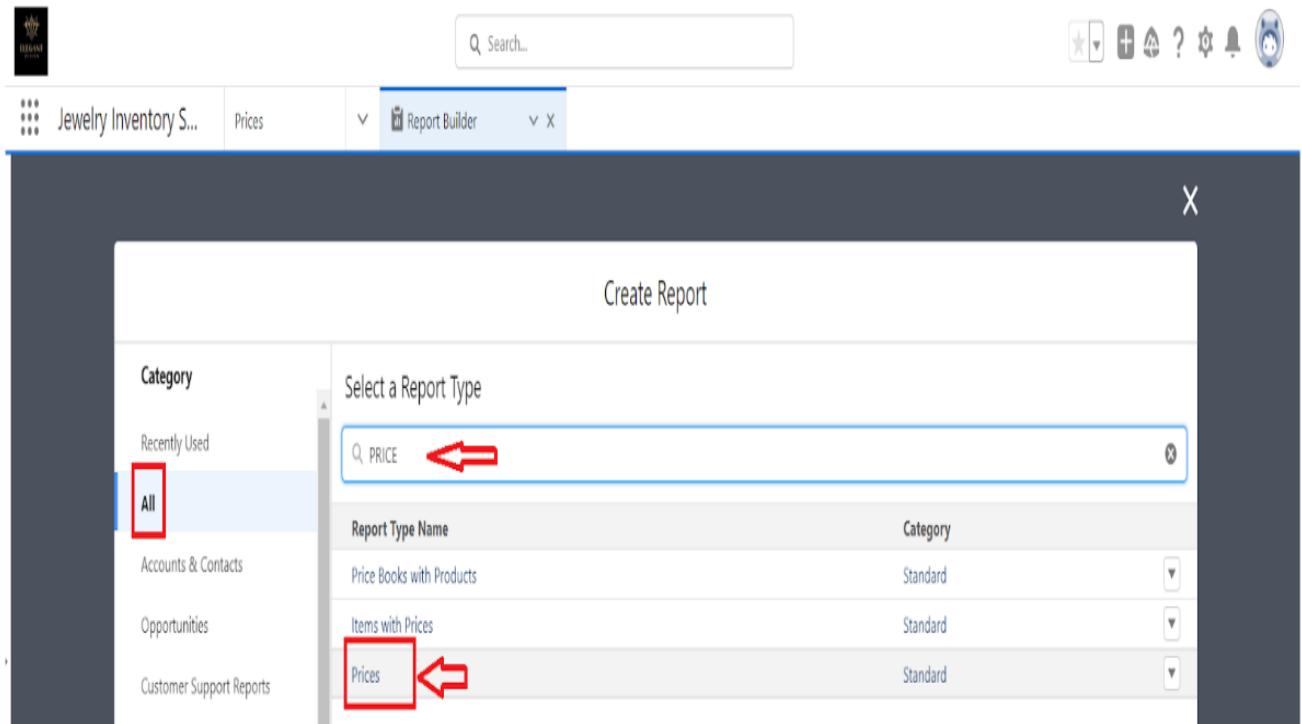
Reports Recent 12 items

REPORTS	Report Name
Recent	New Report billing w/ order
Created by Me	New Items with Billir
Private Reports	New Prices Report
Public Reports	Days on Market
All Reports	New Billings with It...
FOLDERS	New Opportunities v...
All Folders	New Opportunities v...
Created by Me	New Accounts Repo...
Shared with Me	New orders Report
FAVORITES	New Billings with Price Report
All Favorites	Copy of New Report
	New Employees Report

Items Customer Orders Prices Billings Reports Dashboards Home Dimensional Edit

Search recent reports... New Report New Folder

Folder	Created By	Created On	Subscribed
Private Reports	meghana katoju	7/19/2023, 4:34 AM	
Private Reports	meghana katoju	7/19/2023, 4:30 AM	
Private Reports	meghana katoju	7/19/2023, 4:27 AM	
DreamHouse Reports	meghana katoju	5/31/2022, 11:25 PM	
Private Reports	meghana katoju	7/12/2023, 8:45 PM	✓
Private Reports	meghana katoju	7/10/2023, 8:48 PM	
Private Reports	meghana katoju	7/12/2023, 12:03 AM	
Private Reports	meghana katoju	7/12/2023, 12:01 AM	
Private Reports	meghana katoju	7/11/2023, 11:49 PM	
Private Reports	meghana katoju	7/11/2023, 11:39 PM	
Private Reports	meghana katoju	6/20/2023, 11:19 PM	
Private Reports	meghana katoju	6/20/2023, 11:08 PM	



The screenshot shows the Report Builder interface with a report titled 'New Prices Report'. The 'Fields' pane on the left has 'Outline' selected and shows 'Groups' and 'Columns'. A red box highlights the 'Add column...' button under 'Columns'. The main preview area shows a list of 10 price entries from 1 to 10, each with a code like p-022 or p-023. The 'Run' button in the top right corner is also highlighted with a red box.

REPORT ▾

New Prices Report ▾ Prices

Fields > Outline Filters 1

Groups

Columns

Price: Price

Gold price

Silver price

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

	Price: Price	Gold price	Silver price
1	p-022	₹60,000.00000	₹71,000.00000
2	p-021	₹63,000.00000	₹72,000.00000
3	p-027	₹62,350.00000	₹70,200.00000
4	p-029	₹58,700.00000	₹69,000.00000
5	p-030	₹66,000.00000	₹78,000.00000
6	p-026	₹62,000.00000	₹70,000.00000
7	p-025	₹58,000.00000	₹69,000.00000
8	p-028	₹59,900.00000	₹73,000.00000
9	p-024	₹62,000.00000	₹73,000.00000
10	p-023	₹58,000.00000	₹69,000.00000
11		₹609,950.00000	₹714,200.00000

Create Dashboard:

Employee Manage... Home Employees ▾ Assets ▾ Asset Services ▾ Projects ▾ ProjectTasks ▾ Reports ▾ Dashboards ▾

Search...

Dashboards

Recent

0 items

Search recent dashboards...

New Dashboard New Folder

Dashboards

Recent

Created by Me

Private Dashboards

All Dashboards

New Dashboard

* Name

Dashboard 1

Description

Folder

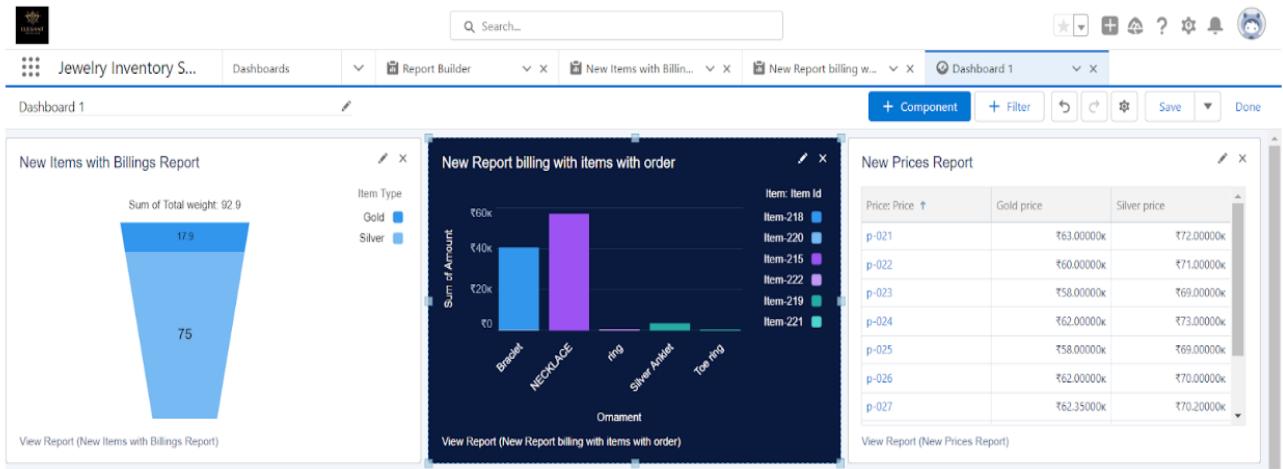
Private Dashboards

Select Folder

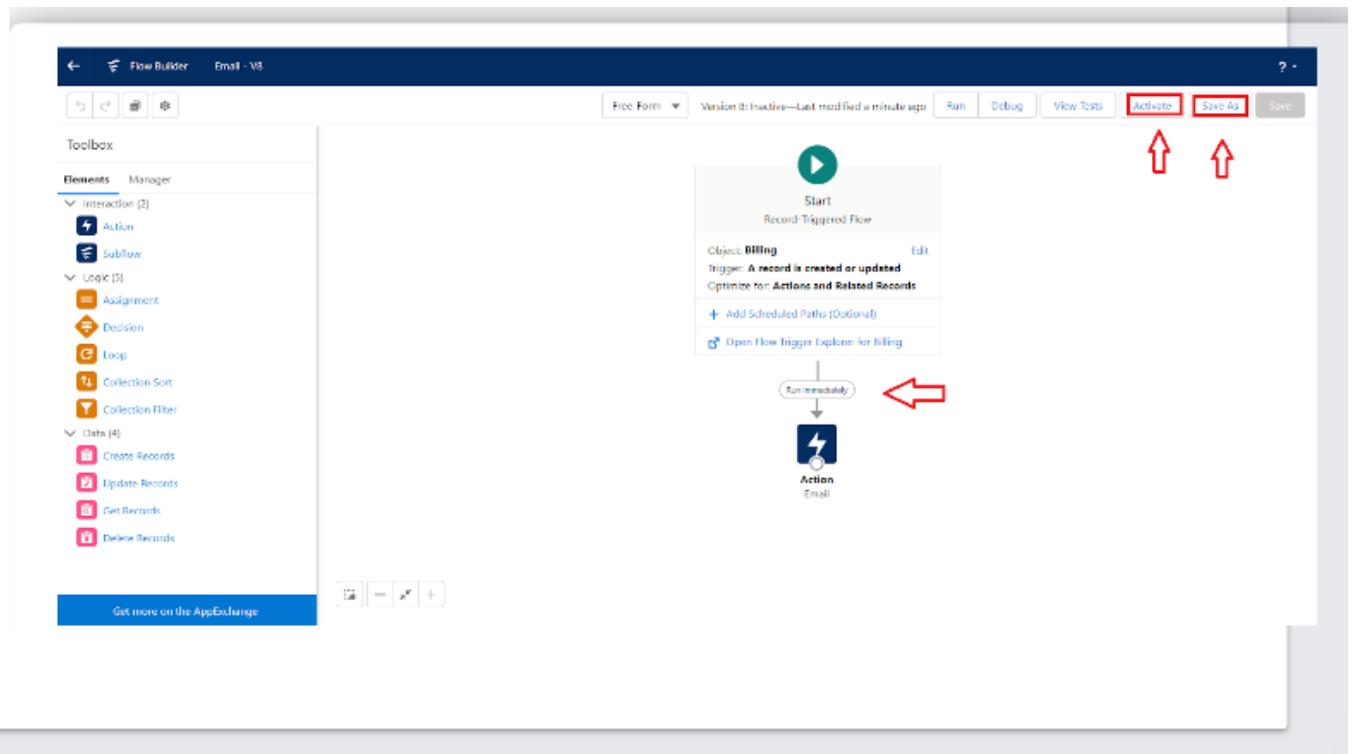
Cancel

Create

The screenshot shows a software interface for creating a new dashboard. At the top, there's a navigation bar with icons for search, favorite, add, filter, and other settings. Below the navigation, a tab bar includes 'Jewelry Inventory S...', 'Dashboards', 'Report Builder', and 'Dashboard 1'. A modal window titled 'Select Report' is open in the center. On the left of the modal is a sidebar with 'Reports' and 'Folders' sections. Under 'Reports', the 'Recent' section is selected, showing items like 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports'. Under 'Folders', it shows 'View Rep...' and 'Shared with Me'. The main area of the modal lists reports with their names, descriptions, and creation dates. Three reports are visible: 'New Report billing with items with order' (meghana katoju - Jul 19, 2023, 4:34 AM - Private Reports), 'New Items with Billings Report' (meghana katoju - Jul 19, 2023, 4:30 AM - Private Reports), and 'New Prices Report' (meghana katoju - Jul 19, 2023, 4:27 AM - Private Reports). At the bottom right of the modal are 'Cancel' and 'Select' buttons.



● FLOWS



New Action

Filter By Category

Action Send Email

Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.

* Label notice * API Name notice

Description

Set Input Values for the Selected Action

A_a Body ⓘ [!Email_Body]

A_a Email Template ID Don't Include

OO Log Email on Send Don't Include

A_a Recipient Address Collection

Cancel Done

The screenshot shows the configuration of a new action in a low-code platform. The action selected is "Send Email". The "Label" field is set to "notice" and the "API Name" field is also "notice", both of which are highlighted with red boxes. In the "Set Input Values" section, the "Body" input field contains "[!Email_Body]" and has a checked toggle switch next to it, also highlighted with a red box. The "Done" button at the bottom right is also highlighted with a red box.

FUNCTIONAL AND PERFORMANCE TESTING

Performance Testing

Jewel Customer:

The screenshot shows a web-based application interface for managing jewel customers. The main title bar includes tabs like 'Jewellery Inventory ...', 'Jewel Customers', 'Item-05 ...', 'Dashboard', 'Recently vi...', 'Recently vi...', 'Item-06 ...', 'Email | I...', 'Item-07 ...', and 'More'. A search bar at the top right contains the placeholder 'Search...'. The top navigation bar has links for 'New Contact', 'Edit', and 'New Opportunity'. The main content area displays a 'Customer Details' form for a customer named 'Elavarasan'. The form fields include: Customer Name (Elavarasan), Owner (Elavarasan s), City (coimbatore), Phone (638) 485-7887, Email (elavarasan520@gmail.com), State (tamilnadu), Street (12/23,childrens park), Country (india), Zip/Postal code (641652), Amount (\$70), Customer Name (gobika), Gold Price (\$70), and a 'Comments' section. The background features a blue map-like pattern.

Items:

The screenshot shows a web-based application interface for managing items. The main title bar includes tabs like 'Jewellery Inventory ...', 'Items', 'Item-05 ...', 'Dashboard', 'Recently vi...', 'Recently vi...', 'Item-06 ...', 'Email | I...', 'Item-07 ...', and 'More'. A search bar at the top right contains the placeholder 'Search...'. The top navigation bar has links for 'New Item', 'Edit', 'Delete', 'Question', 'Help', and 'Logout'. The main content area displays a 'Item Details' form for a gold item. The form fields include: Item Type (Gold), Description (2500), Unit Price (\$64.00), Purity Gold Price (\$1000), Weight (0.52000), Percentage (05), Stone Weight (0.20000), Total Weight (0.250), Stone/Other Price (\$607.00), Amount (\$1000), KTM (\$0), Making Charges (\$156), and a 'Comments' section. At the bottom, it shows 'Created By' (Elavarasan s) and 'Last Modified By' (Elavarasan s) with the date '11/5/2023, 1:46 AM'. The background features a blue map-like pattern.

Customer Order:

Jewellery Inventory ... Customer OrderS Item-05 | C... Dashboard Recently Vi... dashboard2 Elavarasan ... Item-01 | C... More

Customer Order
Item-01

New Contact Edit New Opportunity

Related Details

Customer Order
Item-01

Customer
jiko

Item
Item-03

City
coimbatour

Order Status
Started

Created By
Elavarasan s, 9/3/2025, 2:02 AM

Last Modified By
Elavarasan s, 9/3/2025, 2:02 AM

Price:

Jewellery Inventory ... Prices Item-05 | C... Dashboard Recently Vi... dashboard2 Elavarasan ... Item-01 | P... More

Price
Item-01

Owner
Elavarasan s

Gold Price
\$97,000

Silver Price
\$60,000.00000

Created By
Elavarasan s, 9/3/2025, 1:23 AM

Last Modified By
Elavarasan s, 9/3/2025, 1:23 AM

Billing:

Billing Item-01

Item Item-07

Ornament

3645

Stone weight

\$5.00

Weight

-10.00

Amount

\$0.00

Gold/Silver Price

\$23.50

HTM Charge

\$0

Mining Charge

\$6,300.00

Delivery/Other charge

\$0.00

Total Amount

\$6,300

Paying Amount

\$6,45

Paid Amount

\$6,45

RESULTS

Output Screenshots :

Report: Items with Customer Orders and Customer
New Report

Total Records Total Gold Price
5 \$23,908.10

	Item: Item Id	Customer Order: Customer Order Name	Customer: Customer name	Gold Price
1	Item-02	Item-02	vini	\$3,513.20
2	Item-01	Item-01	abi	\$6,483.60
3	Item-06	Item-04	hari	\$6,541.60
4	Item-04	Item-05	punitha	\$3,683.50
5	Item-03	Item-03	vino	\$3,686.20
6				\$23,908.10

CONCLUSION

A CRM for jewel management centralizes client histories and preferences, enabling hyper-personalized service. It streamlines sales and after-sales processes, boosting efficiency and revenue. By strengthening client relationships, it turns transactions into lifelong loyalty. Ultimately, it is an indispensable tool for thriving in the modern luxury jewelry market.

APPENDIX

Source Code: Provided in Apex Classes and Triggers

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);  
  
    }  
}
```