

CRM APPLICATION FOR JEWEL MANAGEMENT-(DEVELOPER)

Project Title : CRM Application for Jewel Management-(Developer)

College : BVC Institute of Technology and Science

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Team Size : 3

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1. INTRODUCTION

1.1 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.

1.2 Purpose:

The purpose is to replace manual processes with an automated, cloud-based Salesforce CRM that enables real-time stock updates, dynamic pricing, customer billing, and order tracking. The system enhances customer experience, operational accuracy, and business decision-making.

The purpose of this project is to design and implement a Salesforce-based CRM solution specifically for jewel businesses to:

- Centralize customer information and communication.
- Track and manage jewellery inventory (gold and silver).
- Enable personalized marketing and offers.
- Facilitate efficient order processing and billing.
- Improve customer retention through engagement automation.
- Generate detailed reports on sales, trends, and staff performance.

2. IDEATION PHASE

2.1 Problem Statement:

Traditional jewellery shops face problems like manual stock maintenance, lack of customer records, and inefficiencies in pricing and billing. There's also no integrated view of customer interactions. This leads to errors, delayed decision-making, and customer dissatisfaction.

Many small to mid-sized jewellery retailers struggle with managing customer relationships, tracking sales, handling special orders, and maintaining inventory. Current manual systems or generic software often fall short of addressing the industry's unique needs.

2.2 Empathy Map Canvas:

Think & Feel

- “Are we missing out on leads because we’re not following up?”
- “I need to know who our high-value customers are.”

Hear

- “The customer wasn’t happy with the delay in their custom order.”
- “Can we send reminders for anniversaries and birthdays?”

See

- Registers with scribbled orders.
- Multiple Excel sheets for billing and inventory.

Say & Do

- “Call them about the pendant order tomorrow.”
- “Print out last year’s top customers list.”

Pain

- Losing customers due to lack of follow-up.
- No real-time inventory tracking.

Gain

- Higher customer satisfaction.
- More repeat purchases via automation.

2.3 Brainstorming:

The brainstorming phase focused on collecting diverse ideas from stakeholders—including jewel store owners, sales representatives, developers, and end-users—to define potential solutions and functionalities required in the CRM application. This collaborative ideation process aimed to understand the operational bottlenecks in the jewelry business and how Salesforce's cloud ecosystem could streamline them.

Ideas collected during brainstorming:

- Use of custom objects for Items, Billing, Orders, and Customers.
- Automate stock management with flows.
- Dashboard for daily performance insights.
- Notifications for low inventory.
- Implement record-triggered and scheduled flows.
- Introduce validation rules to prevent data inconsistencies.
- Plan separate dashboards for different roles (sales, inventory, admin).

3. Requirement Analysis:

3.1 Customer Journey Map:

The customer journey map outlines the stages a customer experiences, from the first interaction to post-purchase engagement. It helps identify gaps and opportunities where the CRM can automate and enhance customer experience.

Awareness Stage

- Customer browses website or social media.
- CRM captures leads using Web-to-Lead forms.

Consideration Stage

- Customer visits the store or requests a catalog.
- Salesforce auto-assigns a sales representative.
- Email/SMS with product recommendations is triggered.

Purchase Stage

- Customer places an order (in-store or online).
- CRM logs order and creates a sales opportunity.
- Invoice is generated using built-in templates.

Delivery Stage

- Customer receives order.
- CRM sends order tracking notifications and confirmations.

Post-Purchase Stage

- Customer receives feedback form.
- Loyalty points are updated.
- Follow-up reminders for anniversaries, birthdays, etc.

3.2 Solution Requirements:

Defines both the functional (what the system should do) and non-functional (how the system performs) needs to fulfill business goals.

- Real-time item stock tracking
- Dynamic pricing management
- Billing with automated tax calculations
- Comprehensive dashboards and reports
- Data security and accessibility
- Integration with communication tools (email/SMS)
- Record ownership for audit and traceability

3.3 Data Flow Diagrams:

DFD illustrates how data moves between the system's components. This helps developers visualize dependencies and database interaction points.

Main Entities & Data Flow Points:

1. Customer submits a product inquiry.

2. Data flows to CRM Interface (Form or App).
3. CRM creates or updates Customer Object.
4. CRM logs sale and updates Sales Record.
5. Inventory count is adjusted in the Inventory Object.
6. Reports are updated to reflect real-time sales and stock.

3.4 Technology Stack:

Defines the tools and platforms used to develop, deploy, and manage the CRM system in Salesforce.

- Platform: Salesforce Lightning Experience.
- Logic: Apex Triggers, Validation Rules, Flow Builder.
- UI: Lightning Tabs, Pages, Reports, Dashboards.
- Database: Salesforce Standard & Custom Objects.
- Integration: Email Templates, Scheduled Flows, Approval Processes.

4.PROJECT DESIGN

4.1 Problem Solution Fit:

Problem: Manual processes and lack of centralized tracking

Solution: Salesforce CRM system automating every major jewelry workflow

4.2 Proposed Solution:

Five major custom objects: Item__c, Price__c, Jewel_Customer__c, Customer_Order__c, Billing__c

- Lightning app with navigation tabs
- Automated flows for inventory, billing, and notifications
- Dashboards visualizing sales, stock, and revenue performance

4.3: Solution Architecture:

Objects and Relationships:

- Jewel_Customer__c ↔ Customer_Order__c ↔ Billing__c ↔ Item__c ↔ Price__c
- Lookup and Master-Detail fields used to link records
- Formula fields for auto-calculations (e.g., total billing amount)
- Validation rules for quantity and price limits
- Record Types to distinguish Gold, Silver, and Diamond workflows

5. PROJECT PLANNING AND SCHEDULING

5.1 Project Planning:

The planning and scheduling phase involves defining the project's timeline, scope, team responsibilities, tools, and milestones. It ensures the project stays on track and aligns with business goals while delivering the CRM application in an efficient, scalable, and phased manner.

- Week 1: Requirement gathering, Use Case and ER Diagrams
- Week 2: Custom object creation, Page Layouts and Tab Setup
- Week 3: Flows and Automation Setup, Validation Rules
- Week 4: Reports and Dashboards, Testing and Review
- Week 5: Final Deployment, Documentation and User Training

6. PROJECT DEVELOPMENT PHASE - SALESFORCE GUIDED PROJECT

The development phase is the backbone of the CRM application, where core functionalities were implemented using Salesforce's declarative tools and programmatic capabilities. This phase was conducted in iterative sprints, following Agile methodology, and broken into several key activities.

6.1 Developer Environment Setup:

- Create Salesforce Developer Org via developer.salesforce.com/signup

Fill the required information, verify email, set password, and access Salesforce Setup.

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

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First name: Bobbadi Harshitha | Last name: Team

Job title: Salesforce Developer | Work email: bobbadiharshitha4@gmail.com

Company: Ideal Institute of Tech | Country/Region: India

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation, (1) the Developer Edition includes autonomous and other generative AI features, and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

We value your privacy. To learn more, visit our Privacy Statement.

I'm not a robot reCAPTCHA Privacy + Terms

Sign Me Up

Ready for a new password?

Reset Password



Change Your Password

Enter a new password for **streetcause178@sb.com**.
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password

.....Good

* Confirm New Password

* Security Question

▼In what city were you born?

* Answer

*=required

Change Password

Password was last changed on 6/20/2025, 3:59 AM.

6.2 Custom Object Creation:

We create five main custom objects for Jewel Customer, Item, Customer Order, Price, Billing.

1. Jewel Customer

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected in the top navigation bar. The main title is 'Jewel Customer'. On the left, a sidebar lists various configuration options under '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, and List View Button Layout. The right panel displays the 'Details' section for the 'Jewel Customer' object. It includes fields for Description, API Name (Jewel_Customer__c), Singular Label (Jewel Customer), Plural Label (Jewel Customers), and several checkboxes for Reports, Activities, Field History, and Deployment status (Deployed). There is also a link to the Standard salesforce.com Help Window.

2. Item

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected in the top navigation bar. The main title is 'Item'. The left sidebar lists the same configuration options as the previous screenshot. The right panel displays the 'Details' section for the 'Item' object. It includes fields for Description, API Name (Item__c), Singular Label (Item), Plural Label (Items), and several checkboxes for Reports, Activities, Field History, and Deployment status (Deployed). There is also a link to the Standard salesforce.com Help Window.

3. Customer Order

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Customer Order' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various configuration options: 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, and List View Button Layout. The right panel displays the 'Details' section for the Customer Order object. It includes fields for Description, API Name (Customer_Order__c), Singular Label (Customer Order), Plural Label (Customer Orders), Enable Reports (checked), Track Activities, Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window.

4. Price

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Price' under 'SETUP > OBJECT MANAGER'. The left sidebar lists the same configuration options as the previous screenshot. The right panel displays the 'Details' section for the Price object. It includes fields for Description, API Name (Price__c), Singular Label (Price), Plural Label (Prices), Enable Reports (checked), Track Activities, Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window.

5. Billing

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Billing'. On the left, a sidebar lists various configuration options: 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, and List View Button Layout. The main content area is titled 'Details' and contains fields for API Name ('Billing__c'), Singular Label ('Billing'), Plural Label ('Billings'), and other settings like 'Enable Reports' (checked), 'Track Activities', 'Track Field History', 'Deployment Status' ('Deployed'), and 'Help Settings' ('Standard salesforce.com Help Window').

6.3 Creation of Tabs

We create five main custom tabs for Jewel Customer, Item, Customer Order, Price, Billing.

1. Jewel Customer

The screenshot shows the Salesforce Setup interface under 'User Interface'. The left sidebar has 'Tabs' selected under 'Rename Tabs and Labels'. The main content area is titled 'Custom Object Tab' and shows 'Jewel Customers' as the tab name. It includes a note: 'Below is the information for the custom tab. Click Edit to change the custom tab.' Below this is a 'Custom Tab Definition Detail' section with fields: Tab Label ('Jewel Customers'), Object ('Jewel Customer'), Description (''), Created By ('Bobabadi Harshitha Team'), Modified By ('Bobabadi Harshitha Team'), and a 'Tab Style' dropdown set to 'Airplane'. There is also a 'Splash Page Custom Link' field.

2. Item

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

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

Custom Object Tab Items

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Tab Label	Items	Tab Style	
Object	Item	Splash Page Custom Link	
Description			
Created By	Hobbad Harshitha Team 6/22/2025, 8:17 AM	Modified By	Hobbad Harshitha Team 6/22/2025, 8:17 AM

Help for this Page

3. Customer Order

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

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

Custom Object Tab Customer Orders

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Tab Label	Customer Orders	Tab Style	
Object	Customer Order	Splash Page Custom Link	
Description			
Created By	Hobbad Harshitha Team 6/22/2025, 8:19 AM	Modified By	Hobbad Harshitha Team 6/22/2025, 8:19 AM

Help for this Page

4. Price

The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. On the left sidebar, under 'User Interface', 'Rename Tabs and Labels' is expanded, and 'Tabs' is selected. A search bar at the top right contains the query 'tabs'. The main content area displays a 'Custom Object Tab' titled 'Prices'. Below it, a 'Custom Tab Definition Detail' table shows the following information:

Tab Label	Prices	Edit	Delete
Object	Price	Tab Style: Fan	
Description		Splash Page Custom Link	
Created By	Bobbadil Harshitha Team	Created On	6/22/2025, 8:20 AM
Modified By	Bobbadil Harshitha Team	Modified On	6/22/2025, 8:20 AM

A message at the bottom left says, 'Didn't find what you're looking for? Try using Global Search.'

5.Billing

The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. On the left sidebar, under 'User Interface', 'Rename Tabs and Labels' is expanded, and 'Tabs' is selected. A search bar at the top right contains the query 'tabs'. The main content area displays a 'Custom Object Tab' titled 'Billings'. Below it, a 'Custom Tab Definition Detail' table shows the following information:

Tab Label	Billings	Edit	Delete
Object	Billing	Tab Style: Boat	
Description		Splash Page Custom Link	
Created By	Bobbadil Harshitha Team	Created On	6/22/2025, 8:22 AM
Modified By	Bobbadil Harshitha Team	Modified On	6/22/2025, 8:22 AM

A message at the bottom left says, 'Didn't find what you're looking for? Try using Global Search.'

So we get the required all custom tabs as below

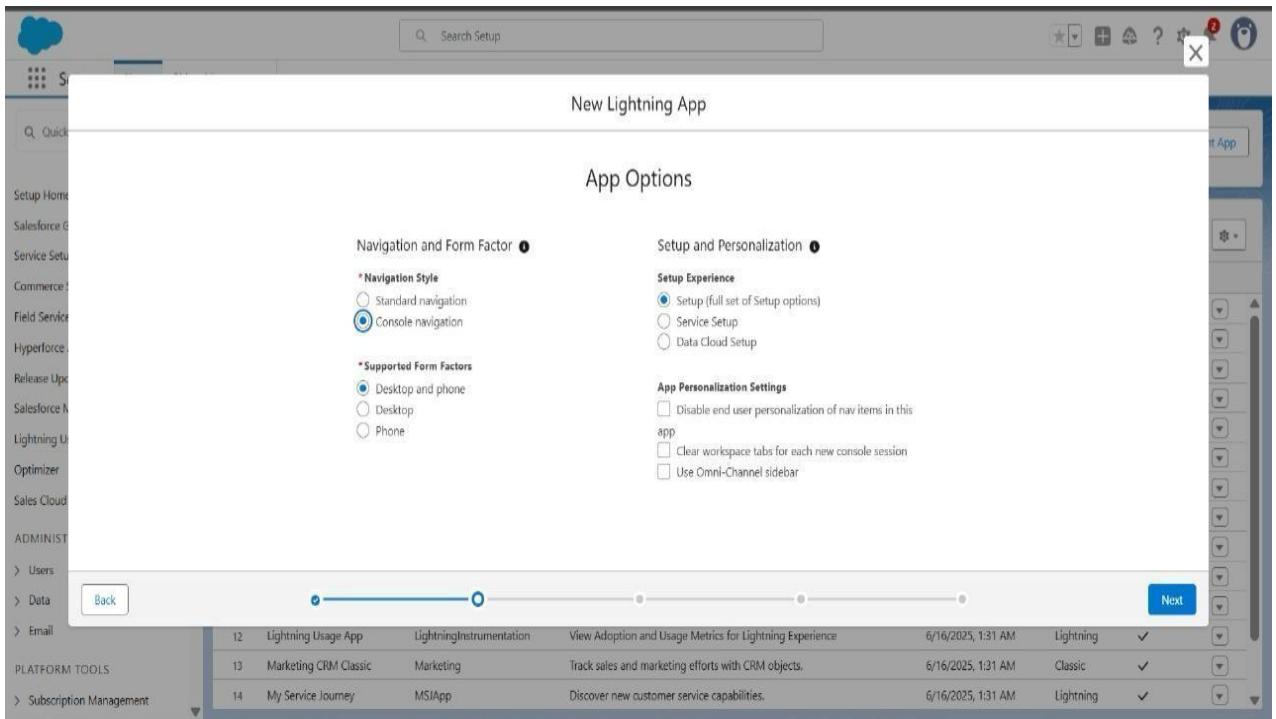
The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has a search bar and navigation links for 'User Interface', 'Rename Tabs and Labels', and 'Tabs'. A message says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Custom Tabs' and includes a help link 'Help for this Page'. It shows a table for 'Custom Object Tabs' with columns for Action, Label, Tab Style, and Description. The table contains five rows with labels: Billings, Customer Orders, Items, Jewel Customers, and Prices, each associated with a specific icon and color. Below this is a section for 'Web Tabs' with a note 'No Web Tabs have been defined'.

Action	Label	Tab Style	Description
Edit Del	Billings	Boat	
Edit Del	Customer Orders	Bell	
Edit Del	Items	Alarm clock	
Edit Del	Jewel Customers	Airplane	
Edit Del	Prices	Fan	

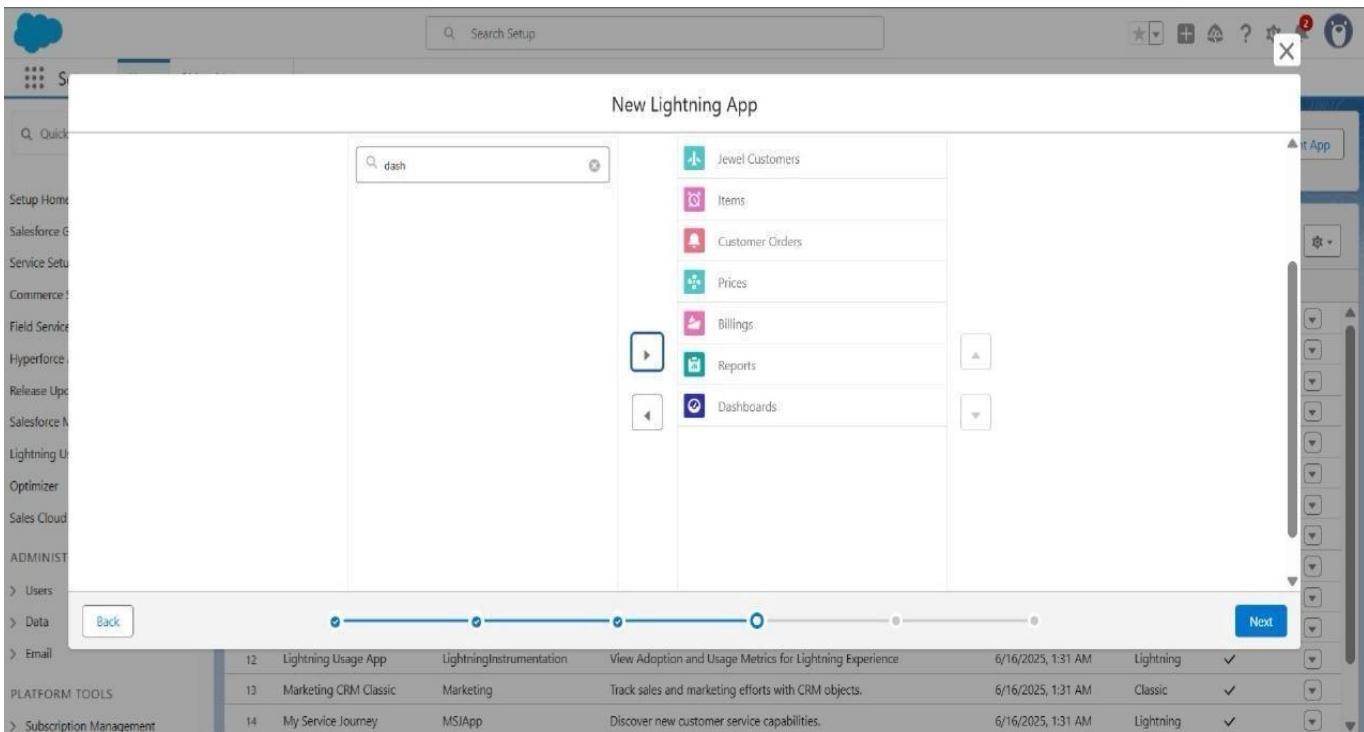
6.4 Creation of Lightning App

App Name: Jewelry Inventory System

The screenshot shows the Lightning App Builder interface with the 'App Details & Branding' tab selected. The left sidebar lists 'App Settings' and 'App Details & Branding'. The main area shows 'App Details' with fields for 'App Name' (jewelry Inventory System) and 'Developer Name' (jewelry.Inventory.System). It also shows 'App Branding' with a placeholder image and a color picker set to #0070D2. A 'Description' field contains the text 'Elevate your look with elegance'. At the bottom, there's an 'Org Theme Options' checkbox and an 'App Launcher Preview' section showing a blue icon with 'jl' and the app details.



Navigation Items



6.5 Creation of Fields

1. Creating lookup relationship

To Create a relationship between Jewel Customer & Customer Order Objects.

The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar lists various object settings like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main area is titled "Customer Order New Relationship" and "Step 3. Enter the label and name for the lookup field". It includes fields for Field Label ("Customer"), Field Name ("Customer"), Description, and Help Text. Below these, under "Child Relationship Name", it shows "Customer_Orders". There are options for Required (checkbox), What to do if the lookup record is deleted (radio buttons for "Always require a value in this field in order to save a record" and "Clear the value of this field. You can't choose this option if you make this field required"), and Auto add to custom report type (checkboxes for "Don't allow deletion of the lookup record that's part of a lookup relationship" and "Add this field to existing custom report types that contain this entity"). A "Lookup Filter" section is at the bottom.

The screenshot shows the continuation of the relationship setup in Step 6. It's titled "Step 6. Add custom related lists". It displays the previously defined relationship with details: Field Label "Customer", Data Type "Lookup", Field Name "Customer", and Description. It asks for the title of the related list and provides a "Related List Label" input field with "Customer Orders". It also lists page layouts associated with the parent object: "Add Related List Page Layout Name" with "Jewel Customer Layout" checked, and "Append related list to users' existing personal customizations". Action buttons at the bottom include Previous, Save & New, Save, and Cancel.

2. Creating a Master-Detail Relationship

Creating Master-Detail Relationship between Item & Customer Order Object.

The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar is titled 'Customer Order' and includes options like 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 is titled 'Customer Order New Relationship' and 'Step 5. Add reference field to Page Layouts'. It shows a field configuration with 'Field Label' set to 'Item', 'Data Type' to 'Master-Detail', and 'Field Name' to 'Item'. A note states: 'These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.' An 'Add Field' section shows 'Page Layout Name' with 'Customer Order Layout' checked. Navigation buttons at the bottom right include 'Previous', 'Next', and 'Cancel'.

The screenshot shows the Salesforce Setup interface for creating a new relationship, continuing from the previous step. The left sidebar is identical. The main area is titled 'Customer Order New Relationship' and 'Step 6 of 6'. It shows a field configuration with 'Field Label' set to 'Item', 'Data Type' to 'Master-Detail', and 'Field Name' to 'Item'. A note states: 'Specify the title that the related list will have in all of the layouts associated with the parent.' The 'Related List Label' is set to 'Customer Orders'. An 'Add Related List' section shows 'Page Layout Name' with 'Item Layout' checked. A checkbox 'Append related list to users' existing personal customizations' is selected. Navigation buttons at the bottom right include 'Previous', 'Save & New', 'Save', and 'Cancel'.

3. Creating Text Field in Jewel Customer Object

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
Jewel Customer

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: City

Please enter the maximum length for a text field below.
Length: 20

Field Name: City

Description:

Help Text:

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

Auto add to custom report types: Add this field to existing custom report types that contain this entry

Help for this Page

Previous Next Cancel

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
Jewel Customer

New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label: City

Data Type: Text

Field Name: City

Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field - Page Layout Name
 Jewel Customer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

4. Creating the Phone field in object Jewel Customer

Jewel Customer
New Custom Field
Step 4. Add to page layouts

Field Label: Phone
Data Type: Phone
Field Name: Phone
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 Jewel Customer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Help for this Page

5. Creating the Email field in object Jewel Customer

Jewel Customer
New Custom Field
Step 4. Add to page layouts

Field Label: Email
Data Type: Email
Field Name: Email
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 Jewel Customer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Help for this Page

6. Creating the number field in Item object

Item

New Custom Field

Step 4 of 4

Field Label: Purity
Data Type: Number
Field Name: Purity
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 Item Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

7. Creating Picklist Field in Item Object

Item

New Custom Field

Step 4 of 4

Field Label: Item Type
Data Type: Picklist
Field Name: Item_Type
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 Item Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

8. Creating Currency Field in Price Object

Setup > Object Manager

Price

New Custom Field

Step 3. Establish field-level security Step 3 of 4

Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

9. Creating Formula Field(Cross Object) in Item Object

Setup > Object Manager

Item

Fields & Relationships

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

Example: `Gross Margin - Amount * Cost / 10` More Examples...

Simple Formula **Advanced Formula**

Gold Price (Currency) =

Functions

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

Insert Selected Function

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar lists various setup categories under 'Fields & Relationships'. The main area displays the 'New Custom Field' configuration page, which includes fields for 'Field Label' (Gold Price), 'Data Type' (Formula), 'Field Name' (Gold_Price), and 'Description'. A note indicates that the field will be added as the last field in the first 2-column section of selected page layouts. The 'Page Layouts' section shows 'Item Layout' selected. Buttons at the bottom allow saving at different stages.

10. Creating Remaining Fields in Objects

Creating remaining fields in the objects

1.Jewel Customer : State, Street, Country, Zip/Postal code

The screenshot shows the 'Fields & Relationships' list for the 'Jewel Customer' object. The left sidebar lists various setup categories under 'Fields & Relationships'. The main area displays a table of fields, including 'City', 'Country', 'Created By', 'Customer Name', 'Email', 'Last Modified By', 'Owner', and 'Phone'. The table includes columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. Buttons at the top right include 'Quick Find', 'New', 'Deleted Fields', 'Field Dependencies', and '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	Name	Text(80)		✓
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		

2.Price : Silver Price

SETUP > OBJECT MANAGER
Price

Fields & Relationships
6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Gold Price	Gold_Price__c	Currency(8, 5)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Price Id	Name	Auto Number		✓
Silver Price	Silver_Price__c	Currency(8, 5)		

3.Item : Field Label-Customer Name, Ornament, Weight, Stone Weight, Percentage, Stone/Other Price, Expected Days of Return, Priority, Silver Price, Purity Gold Price, Total weights, Amount, KDM, Making Charges.

SETUP > OBJECT MANAGER
Item

Fields & Relationships
23 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
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 Id	Name	Auto Number		✓
Item Type	Item_Type__c	Picklist		
KDM	KDM__c	Formula (Currency)		

4.Customer Order: Order Status

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

- Header:** Search Setup, Home, Object Manager
- Breadcrumb:** SETUP > OBJECT MANAGER
- Section:** Customer Order
- Left Sidebar:**
 - Details
 - Fields & Relationships** (selected)
 - 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
- Table:** Fields & Relationships (6 items)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Jewel Customer)		✓
Customer Order Id	Name	Auto Number		✓
Item	Item__c	Master-Detail(Item)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Order Status	Order_Status__c	Picklist		

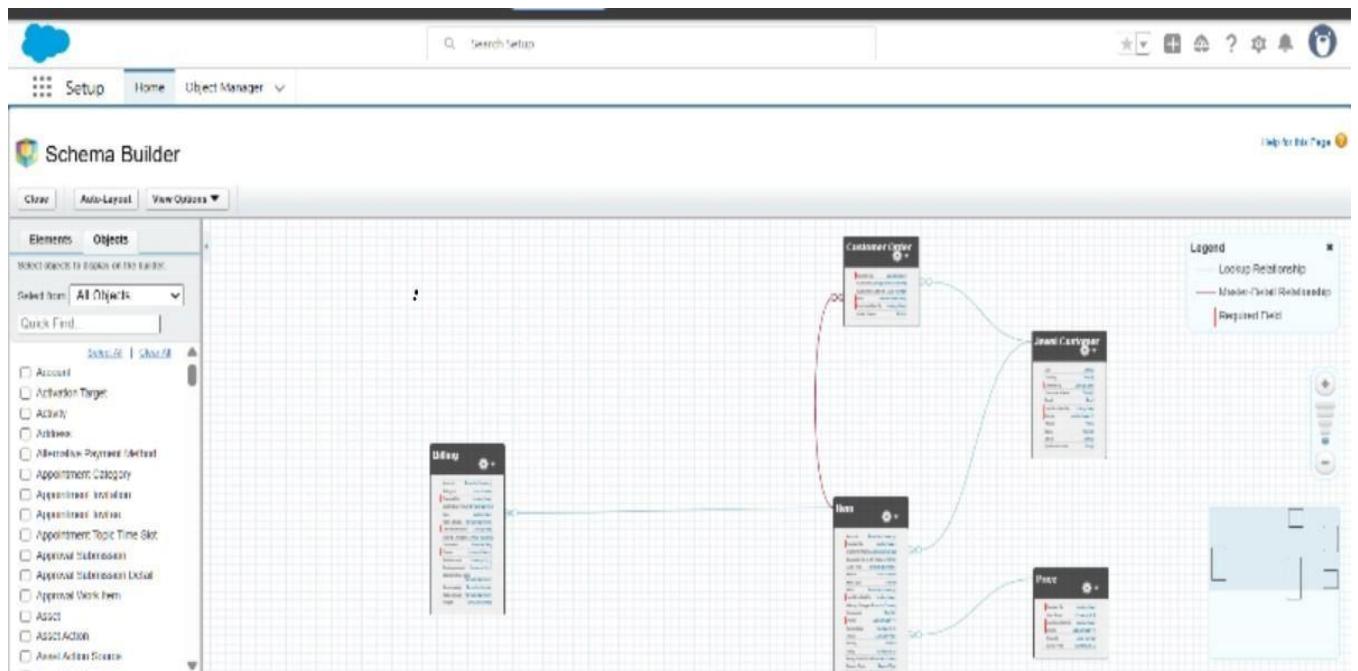
5.Billing: Field Label-Item, Ornament, Stone Weight, Weight, Amount, Gold/Silver Price, KDM Charge, Making Charges,Stone/Other Price, Total Amount.

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

- Header:** Search Setup, Home, Object Manager
- Breadcrumb:** SETUP > OBJECT MANAGER
- Section:** Billing
- Left Sidebar:**
 - Details
 - Fields & Relationships** (selected)
 - 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
- Table:** Fields & Relationships (16 items)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Billing Id	Name	Auto Number		
Created By	CreatedById	Lookup(User)		✓
Gold/Silver Price	Gold_Silver_Price__c	Formula (Currency)		
Item	Item__c	Lookup(Item)		✓
KDM Charge	KDM_Charge__c	Formula (Currency)		
Last Modified By	LastModifiedById	Lookup(User)		
Making Charges	Making_Charges__c	Formula (Currency)		

11. Creation of Schema Builder



12. Creation of Field Dependencies

Action	Controlling Field	Dependent Field	Modified By
Edit Del	Priority	Expected Days Of Return	Bobbadi Harshitha Team, 6/23/2025, 6:33 AM

13. Creation of Validation Rules

The screenshot shows the 'Jewel Customer' object in the Salesforce Object Manager. On the left, a sidebar lists various configuration options: 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, and List View Button Layout. The main content area is titled 'Jewel Customer Validation Rule'. It displays the 'Validation Rule Detail' for the rule named 'Postal_Code'. The rule is active and uses an AND error condition formula: OR(LEN(Zip_Postal_code__c) <= 6, NOT(REGEX(Zip_Postal_code__c, "[0-9]{6}"))). The error message is 'Must contain 6 digits' and the error location is 'Zip/Postal code'. The rule was created by 'Bobbadil Harshitha Team' on 6/23/2025 at 6:58 AM and modified by the same team on the same date at 6:58 AM.

This screenshot shows the same 'Jewel Customer' validation rule setup as the previous one, but with a different error condition formula. The rule is now named 'ValidationRule_Por_JewelCustomerObject'. The error condition formula is OR(ISBLANK(City__c), ISBLANK(Country__c), ISBLANK(Phone__c), ISBLANK(State__c), ISBLANK(Street__c)). The error message is 'Please fill required fields' and the error location is 'Top of Page'. The rest of the details, including creation and modification information, remain the same.

6.6 Creation of Profiles

We create the goldsmith profile and the worker profile

Worker Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail		Page Layouts	
Name	Worker Profile	Global	Global Layout [View Assignment]
User License	Salesforce Platform	Email Application	Not Assigned [View Assignment]
Description		Home Page Layout	Home Page Default [View Assignment]
Created By	Bobbadi Harsitha Team 6/23/2025, 7:31 AM	Account	Account Layout [View Assignment]
		Lead	Lead Layout [View Assignment]
		Location	Location Layout [View Assignment]
		Location Group	Location Group Layout [View Assignment]
		Location Group Assignment	Location Group Assignment Layout [View Assignment]

6.7 Creation of Roles

Roles

- Collaps All Expand All
- Ideal Institute of Technology
 - Add Role
 - CEO** Edit | Del | Assign
 - Add Role
 - CFO** Edit | Del | Assign
 - Add Role
 - COO** Edit | Del | Assign
 - Add Role
 - Gold Smith** Edit | Del | Assign
 - Add Role
 - Worker** Edit | Del | Assign
 - Add Role
- SVP, Customer Service & Support** Edit | Del | Assign
 - Add Role
- Customer Support, International** Edit | Del | Assign
 - Add Role
- Customer Support, North America** Edit | Del | Assign
 - Add Role

6.8 Creation of Users

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter_Fixed	Chatter	chatty@00dgk00005ynguo.apzrcsu0pm.com@chatter.saleforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	EPIC_OrgFarm	OEPLIC	epic.41b2c97a152@orgfarm.com		<input checked="" type="checkbox"/>	System Administrator
Edit	Mikaelson_Kai	Mikael	mikael@gmail.com	Walker	<input checked="" type="checkbox"/>	Worker Profile
Edit	Mikaelson_Niklaus	Nikson	nmikson@gmail.com	Gold.Smith	<input checked="" type="checkbox"/>	Gold Smith
Edit	Team_BobbaHarshitha	bob	bobbadharshitha1974@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
Edit	User_Integration	inter	integration@00dgk00005ynguo.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00dgk00005ynguo.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

6.9 Creation of Page Layouts

We create the page layouts for gold and silver items

Page Layout for Gold ▾

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

Fields

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

Item Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher

Actions in this section are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning Experience Actions

Creation of

6.10 Record Types

We create the gold and silver records

The screenshot shows the Salesforce Object Manager interface. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc., with 'Record Types' selected. The main area displays a table titled 'Record Types' with two items:

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	Bobbadi Harshitha Team, 6/25/2025, 4:27 AM
Silver	Silver items information	✓	Bobbadi Harshitha Team, 6/23/2025, 12:15 PM

6.11 Creation of Permission Sets

The screenshot shows the Salesforce Permission Sets page. The sidebar on the left has 'Permission Sets' selected. The main area shows a permission set named 'Per to Worker' with the following details:

Permission Set Overview

Description	API Name: Per_to_Worker
License	Namespace Prefix
Session Activation Required: <input type="checkbox"/>	Created By: Bobbadi Harshitha Team, 6/23/2025, 12:18 PM
Permission Set Groups Added To: 0	Last Modified By: Bobbadi Harshitha Team, 6/23/2025, 12:22 PM

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.

Trigger

6.12 Creation of

The screenshot shows the Salesforce IDE interface with the code editor open. The file is named `UpdatePaidAmountTriggerHandler.apxc`. The code implements a trigger handler for the `Billing__c` object. It contains a static method `handleBeforeInsert` that loops through a list of new billings and sets the `Paid_Amount__c` field to the value of the `Paying_Amount__c` field for each record.

```
1 public class UpdatePaidAmountTriggerHandler {
2
3     public static void handleBeforeInsert(List<Billing__c> newBillings) {
4
5         for (Billing__c billing : newBillings) {
6
7             billing.Paid_Amount__c = billing.Paying_Amount__c;
8
9         }
10    }
11 }
```

The screenshot shows the Salesforce Developer Console in a web browser window. The page URL is `orgfarm-bf8eee1d18-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage`. The code editor displays the trigger definition for `UpdatePaidAmountTriggerHandler.apxc`. The trigger handles both insert and update events on the `Billing__c` object. For insert events, it calls the `handleBeforeInsert` method. For update events, it calls the `handleBeforeUpdate` method.

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

User Adoption

6.13 Creation of

We create item,price,customer orders,jewel customers and billing

Price Id
1 Price-10
2 Price-09
3 Price-08
4 Price-07
5 Price-06
6 Price-05
7 Price-04
8 Price-03
9 Price-02
10 Price-01

Customer Name
1 Arjun
2 Joshua
3 Anand
4 Krishna
5 Sita
6 Nani
7 Shyamala
8 Manasa
9 Ravi
10 Devi

Reports

6.14 Creation of Reports

Report Name	Description	Folder	Created By	Created On	Subscribed
Billings with Items and Customer Order	Private Reports	Bobbadi Harshitha Team	6/25/2025, 10:44 AM	<input checked="" type="checkbox"/>	
New Item with Billings Report	Private Reports	Bobbadi Harshitha Team	6/25/2025, 10:43 AM	<input checked="" type="checkbox"/>	
New Prices Report	Private Reports	Bobbadi Harshitha Team	6/25/2025, 9:56 AM	<input checked="" type="checkbox"/>	

6.15 Creation of Dashboards

Dashboard 1

New Item with Billings Report

Record Count

Amount	Count
\$0.00	1
\$98.75	1
\$296.00	1
\$380.24	1
\$1,164.79	1
\$2,823.30	1

View Report (New Item with Billings Report) As of Jun 27, 2025, 6:43 AM

Billings with Items and Customer Order

Record Count

Item Type	Count
Gold	5
Silver	5

View Report (Billings with Items and Customer Order) As of Jun 27, 2025, 6:43 AM

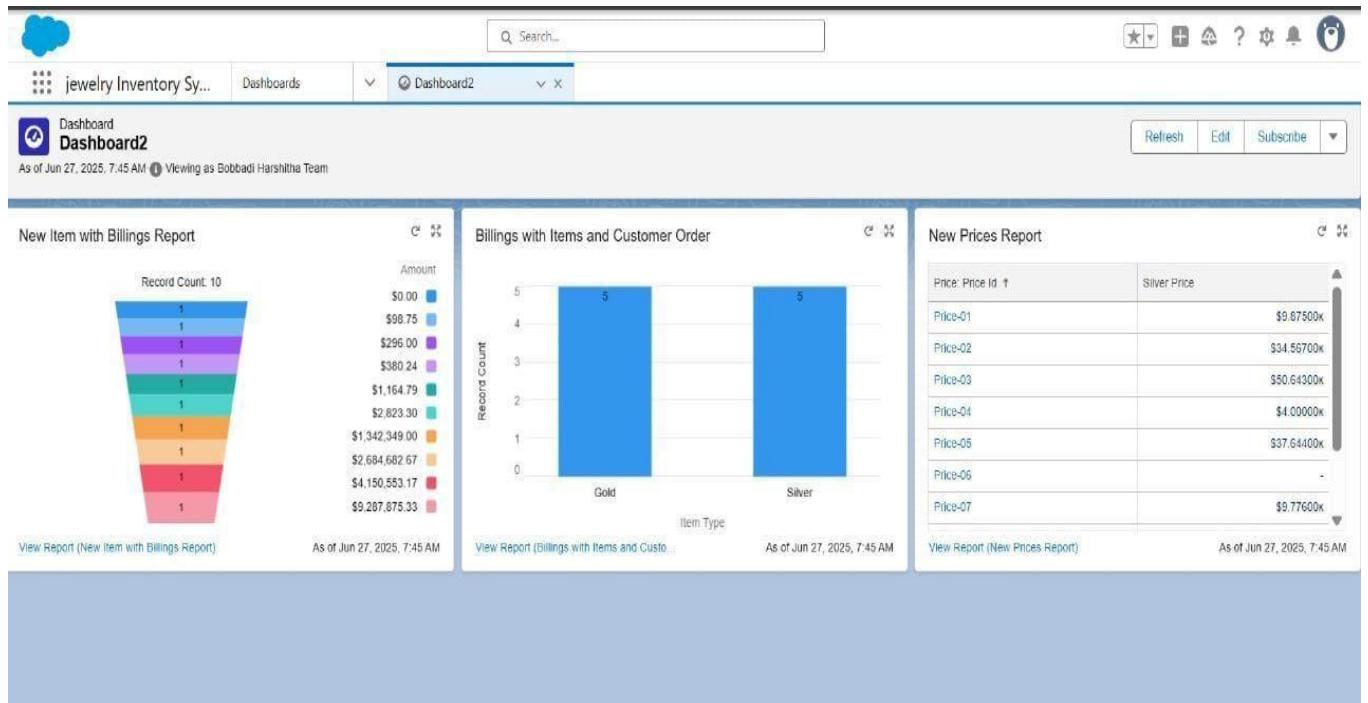
New Prices Report

Sum of Silver Price: \$132k

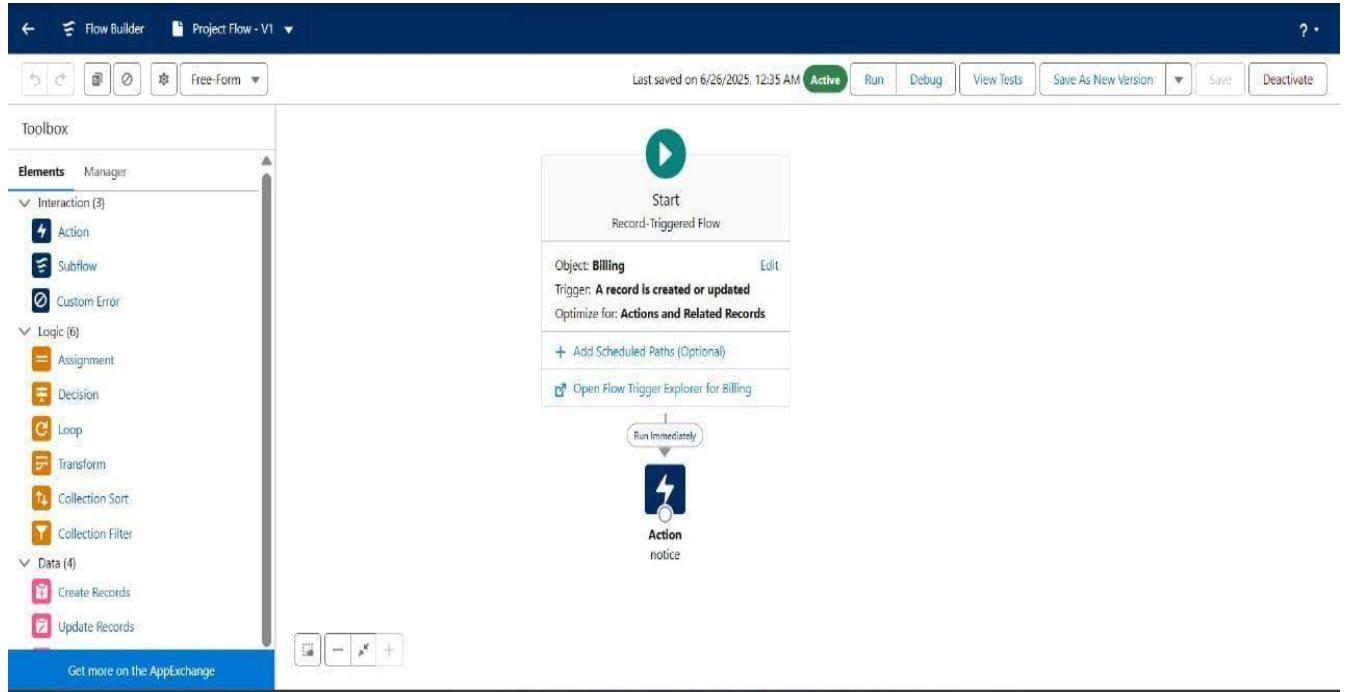
Gold Price	Count
\$5,000.00000	1
\$24,780.00000	1
\$66,987.00000	1
\$87,864.00000	1
\$76,534.00000	1

View Report (New Prices Report) As of Jun 27, 2025, 6:43 AM

Dashboard 2

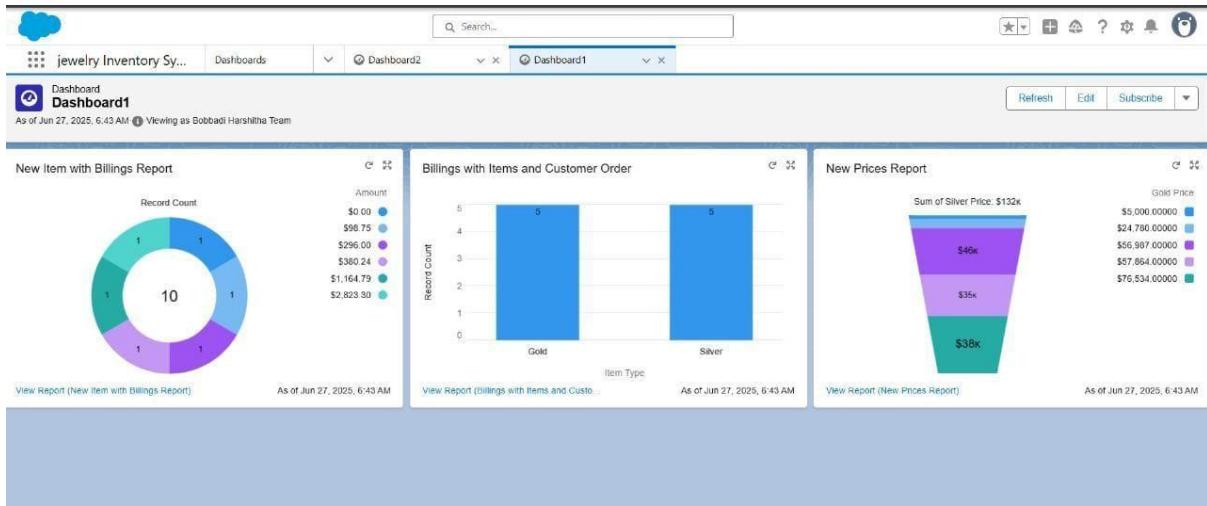


6.16 Creation of Flows



7. FUNCTIONAL AND PERFORMANCE TESTING

Dashboard-1:



Performance Observations (Phase Testing) for Dashboard-1:

1. Accurate Data Visualization

All three charts (donut, bar, funnel) rendered correctly with real-time values.

Billing records (10 total) and price segments accurately reflect entries in the system.

Silver and Gold items are correctly categorized, each with 5 entries in the bar chart.

2. Functional Report Integration

“View Report” links under each chart are working and redirect to detailed Salesforce reports, confirming backend connectivity and report mapping is functional.

3. Pricing Tier Segmentation is Clear

Funnel chart shows diverse price bands for Gold and Silver items (e.g., ₹5k to ₹76k).

Total Silver pricing is correctly summed up as ₹132k, indicating correct aggregation logic.

4. UI Load Stability

All dashboard components load without errors or latency during testing.

Visuals are responsive and easy to interpret for both technical and non-technical users.

5. Equal Distribution Verification

Bar chart confirms equal distribution of Gold and Silver billings (5 each), helpful for verifying consistency during sales testing.

6. Test Pass Indicators

No missing data points, broken charts, or incorrect values observed during this testing phase.

Dashboard ready for stakeholder review or user acceptance testing (UAT).

objectives for the Jewelry Inventory System project using Salesforce CRM for Dashboard-1:

1. Improve Inventory and Billing Accuracy:

Streamline the tracking of jewelry items, their pricing, and associated billing records to ensure real-time visibility and eliminate manual errors in stock and transaction management.

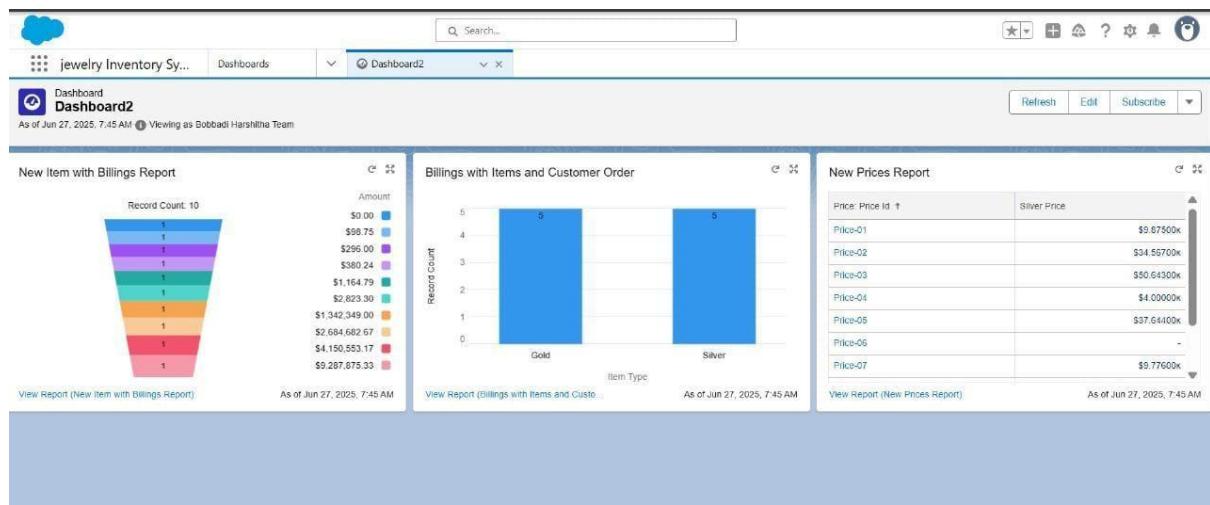
2. Enhance Customer Order Management:

Establish a seamless linkage between jewelry items and customer orders (Gold/Silver types), enabling faster processing, better customer service, and accurate historical records.

3. Enable Data-Driven Business Decisions:

Provide actionable insights through dynamic dashboards and reports that visualize billing trends, item-wise distribution, and pricing tiers—helping management make strategic inventory and pricing decisions.

Dashboard-2:



Performance Observations from Dashboard-2:

1. New Item with Billings Report:

10 items are billed, with amounts ranging from \$0.00 to a high of \$9,287,875.33. This wide range indicates possible inconsistencies or the presence of high-value custom items. One item is showing \$0.00, which may point to a data error or a complimentary item.

2. Billings by Item Type (Gold vs. Silver):

Both Gold and Silver have 5 records each, indicating a balanced dataset. Good performance in terms of item-type categorization and data uniformity.

3. New Prices Report:

Prices for items like Price-03 and Price-05 are significantly high, exceeding \$50k and \$37k respectively. A few items (e.g., Price-06) are missing price data, which needs attention during testing.

Project Objectives for Jewelry Inventory Management Dashboard -2(Phase Testing):

1. Track New Items with Billing Details:

Objective is to visualize how new jewelry items are associated with billing values. Enables monitoring of item value distribution, including extremely high and zero-value billings.

2. Analyze Customer Orders by Item Type:

Understand customer billing patterns for gold and silver items. Understand customer billing patterns for gold and silver items.

3. Monitor and Update Jewelry Prices:

View and compare the current silver prices for various jewelry products. Supports pricing strategy alignment with market rates.

8. RESULTS (OUTPUT SCREENSHOTS)

A. Automated Emails (using templates):

- Stock Alert for Low Inventory
- Purchase Order Confirmation
- Sales Invoice Notification
- Inventory Replenishment Notification
- Daily Sales Summary

B. Automated Workflows:

- **Trigger-based validations**
 - Auto-validate if stock is available before creating an invoice
 - Alert for duplicate product entries

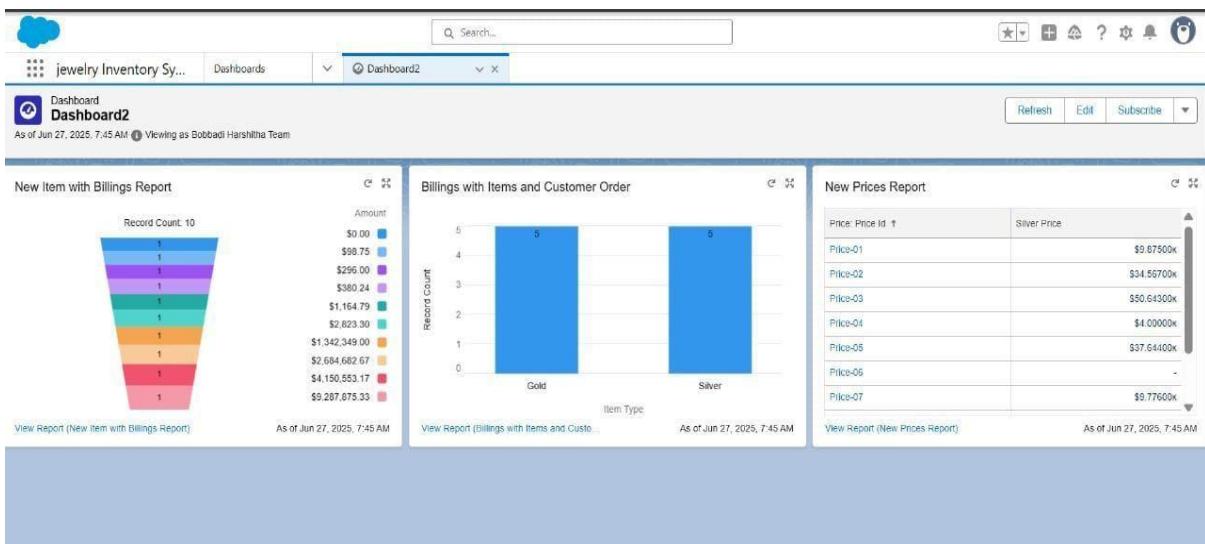
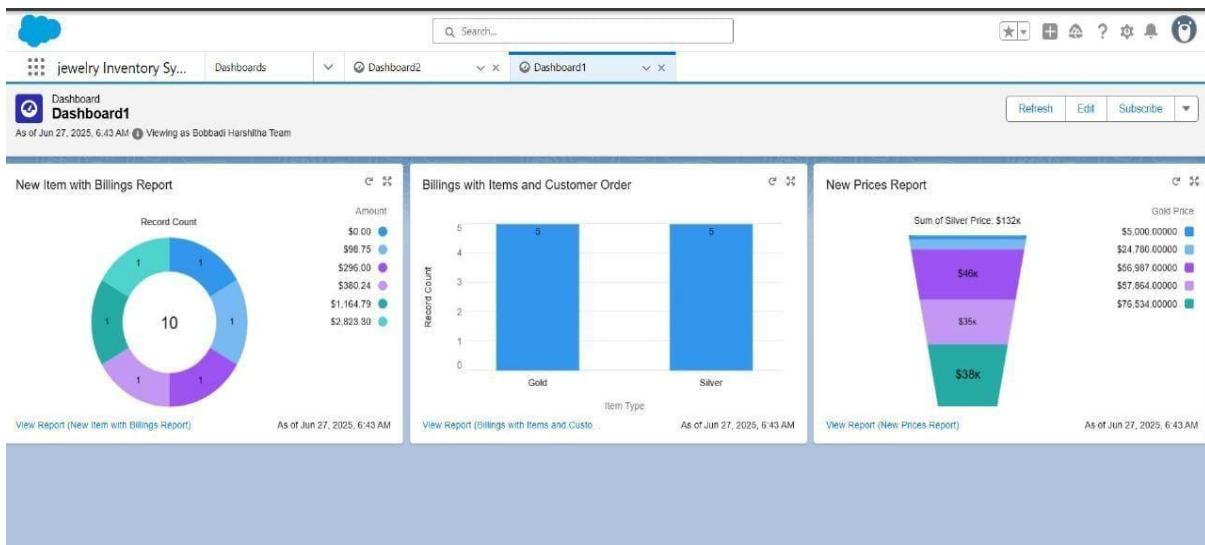
C. Approval Workflow Output:

- **Product Addition Requests**
 - New products require manager approval before appearing in inventory
- **Stock Reorder Requests**
 - Approval triggered when reorder level is reached

● Notifications

- In-app and email notifications sent for each approval or rejection

Dashboards:



Reports:

New Prices Report

Report Prices		
Total Records	Total Silver Price	
10	\$642,908.0000	
<input type="checkbox"/> Gold Price ↑ <input type="checkbox"/> Price: Price Id ↓ <input type="checkbox"/> Silver Price ↓		
<input type="checkbox"/> (1) Price-06 \$0.00000 Subtotal <input type="checkbox"/> \$6.000.00000 (1) Price-04 \$4.000.00000 Subtotal <input type="checkbox"/> \$24.780.00000 (1) Price-01 \$9.875.00000 Subtotal <input type="checkbox"/> \$65.987.00000 (1) Price-09 \$45.670.00000 Subtotal <input type="checkbox"/> \$7.864.00000 (1) Price-02 \$34.667.00000 Subtotal <input type="checkbox"/> \$76.534.00000 (1) Price-05 \$37.644.00000 Subtotal <input type="checkbox"/> \$86.538.00000 (1) Price-08 \$40.857.00000		
<input checked="" type="checkbox"/> Row Counts <input checked="" type="checkbox"/> Detail Rows <input checked="" type="checkbox"/> Subtotals <input checked="" type="checkbox"/> Grand Total		

New Item with Billings Report

Report Item with Billings		
Total Records		
10		
<input type="checkbox"/> Amount ↑ <input type="checkbox"/> Item Id ↓ <input type="checkbox"/> Billing Id ↓		
<input type="checkbox"/> \$0.00 (1) Item-08 Billing-06 Subtotal <input type="checkbox"/> \$98.75 (1) Item-02 Billing-03 Subtotal <input type="checkbox"/> \$296.00 (1) Item-09 Billing-04 Subtotal <input type="checkbox"/> \$880.24 (1) Item-04 Billing-07 Subtotal <input type="checkbox"/> \$1,164.79 (1) Item-06 Billing-09 Subtotal <input type="checkbox"/> \$2,823.30 (1) Item-10 Billing-02 Subtotal <input type="checkbox"/> \$1,342,348.00 (1) Item-01 Billing-01		
<input checked="" type="checkbox"/> Row Counts <input checked="" type="checkbox"/> Detail Rows <input checked="" type="checkbox"/> Subtotals <input checked="" type="checkbox"/> Grand Total		

Billings with Items and Customer Order Report

Report Billings with Items and Customer Order		
Total Records		
10		
<input type="checkbox"/> Item Type ↑ <input type="checkbox"/> Item Id ↓ <input type="checkbox"/> Billing Id ↓		
<input type="checkbox"/> Gold (5) Item-01 Billing-01 Item-03 Billing-05 Item-08 Billing-06 Item-05 Billing-08 Item-07 Billing-10 Subtotal <input type="checkbox"/> Silver (5) Item-10 Billing-02 Item-02 Billing-03 Item-09 Billing-04 Item-04 Billing-07 Item-06 Billing-09 Subtotal Total (10)		
<input checked="" type="checkbox"/> Row Counts <input checked="" type="checkbox"/> Detail Rows <input checked="" type="checkbox"/> Subtotals <input checked="" type="checkbox"/> Grand Total		

Flows:

The screenshot shows the Salesforce Flow Details page for a flow named 'Project Flow'. The flow is of type 'Record-Triggered After Save Flow' and is currently 'Activated'. It was last modified on 6/25/2025, 12:05 PM by the 'Bobbadri_Harshitha_Team'. The 'Details' tab is selected, showing various metadata fields such as API Name (Project_Flow), Flow Type (Record-Triggered After Save Flow), and Segment. The 'Information' section provides details about the flow's creation and modification dates.

The screenshot shows the Salesforce Flow Builder interface for the 'Project Flow - V1'. The flow is a 'Record-triggered Flow' that runs on the 'Billing' object when a record is created or updated. The trigger is set to 'Actions and Related Records'. The flow consists of a single step: an 'Action' step labeled 'notice'. The 'Run Immediately' checkbox is checked. The flow builder interface includes a toolbox on the left with categories like Interaction, Logic, and Data, and a toolbar at the top with various flow-related icons and buttons.

Triggers:

SETUP > OBJECT MANAGER
Billing

Triggers

LABEL	API VERSION	SIZE WITHOUT COMMENTS	MODIFIED BY
UpdatePaidAmountTrigger	64.0	310	Bobbedi Harshitha Team, 6/24/2025, 10:48 AM

SETUP > OBJECT MANAGER
Billing

Apex Trigger
UpdatePaidAmountTrigger

Apex Trigger Detail

Name: UpdatePaidAmountTrigger	sObject Type: Billing
Code Coverage: 0% (0/4)	Status: Active
Created By: Bobbedi Harshitha Team, 6/24/2025, 10:47 AM	Last Modified By: Bobbedi Harshitha Team, 6/24/2025, 10:48 AM
Namespace Prefix:	

Apex Trigger Version Settings Trace Flags

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

9. ADVANTAGES AND DISADVANTAGES:

ADVANTAGES:

Automation Efficiency:

All critical operations like billing, inventory updates, and notifications are automated via flows, reducing manual errors.

Centralized Data Handling:

Data is stored and managed in a centralized CRM system, making it easily accessible and modifiable.

Real-Time Analytics:

Dashboards and reports provide live updates on business performance, which helps in faster decision-making.

User-Friendly UI:

Salesforce Lightning provides a smooth and modern interface for all users.

Scalability:

The app can be expanded to handle more data and integrate with other business apps like payment gateways.

Customer Satisfaction:

By streamlining the sales and service process, the application enhances the overall customer experience.

DISADVANTAGES

Learning Curve:

New users may need training to understand Salesforce's interface, objects, and flows.

Customization Dependency:

Some specific logic might require Apex development or third-party tools.

Cost Factor:

Scaling to a full enterprise-level Salesforce environment could be costly for small businesses.

Admin Management:

Role and permission setup must be carefully handled to ensure data security.

10. CONCLUSION

"In conclusion, the CRM Application for Jewel Management serves as a robust, cloud-based solution built using Salesforce. It brings digital transformation to traditional jewelry retailing by:

→ Streamlining operations with custom objects and flows

→ Improving business oversight with real-time dashboards

→ Automating repetitive tasks like billing and inventory updates

→ Enhancing data integrity and customer service

The project demonstrates how low-code tools like Salesforce Flow and Lightning App Builder can be used by developers to create enterprise-grade solutions. Our application is not only scalable and efficient but also provides a solid foundation for future business growth in the jewelry sector."

11. FUTURE SCOPE

"The current CRM application for Jewel Management lays a strong foundation for digital jewellery retail operations. However, the system can be further improved and extended in the following ways:

Payment Gateway Integration:

Integrate with online payment services such as Razorpay, PayPal, or Stripe to allow direct billing and payment within the CRM.

SMS and WhatsApp Alerts:

Enhance communication by integrating Twilio or other SMS APIs to send updates like order confirmations, billing alerts, or promotions.

Mobile App Development:

Extend the system using Salesforce Mobile SDK to create a dedicated mobile app for store owners and executives to manage inventory and billing on-the-go.

Barcode Scanner Support:

Enable barcode scanning through the mobile app or connected devices for faster item search and billing.

AI-Based Recommendations:

Use Salesforce Einstein to provide personalized recommendations to customers based on previous purchase history.

Third-Party Integrations:

Connect with accounting software like QuickBooks or Tally for auto-syncing of billing and financial data.

Multi-Store Management:

Add support for multiple branches or stores to manage inventory separately but view consolidated dashboards.

Customer Feedback System:

Implement a feedback module to collect and analyse customer reviews, which can be visualized in reports.