CRM APPLICATION FOR JEWEL MANAGEMENT

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COLLEGE CODE: CB

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INTRODUCTION:

Project Overview

Project Name:

CRM Application for Jewel Management

🗎 Overview:

The **CRM Application for Jewel Management** is a comprehensive software solution designed to streamline and automate the operations of jewelry businesses. This application aims to improve customer relationship management, enhance inventory control, optimize sales processes, and support better decision-making through data analytics.

Jewelry businesses handle a wide variety of products—such as gold, silver, diamond, and custom jewelry—which require precise tracking and customer-specific interactions. Traditional manual methods can lead to errors, customer dissatisfaction, and poor inventory management. This CRM application addresses those challenges by providing a centralized, user-friendly digital platform tailored specifically for the jewelry industry.

Target Users:

- Jewelry retail stores
- Jewelry chains and franchises
- Wholesale jewel distributors
- Boutique and custom jewel designers
- Workshop managers (for repair/service tracking)

⚙ Core Modules:

1. Customer Management
2. Product & Inventory Management
3. Sales & Order Processing
4. Billing & Invoicing

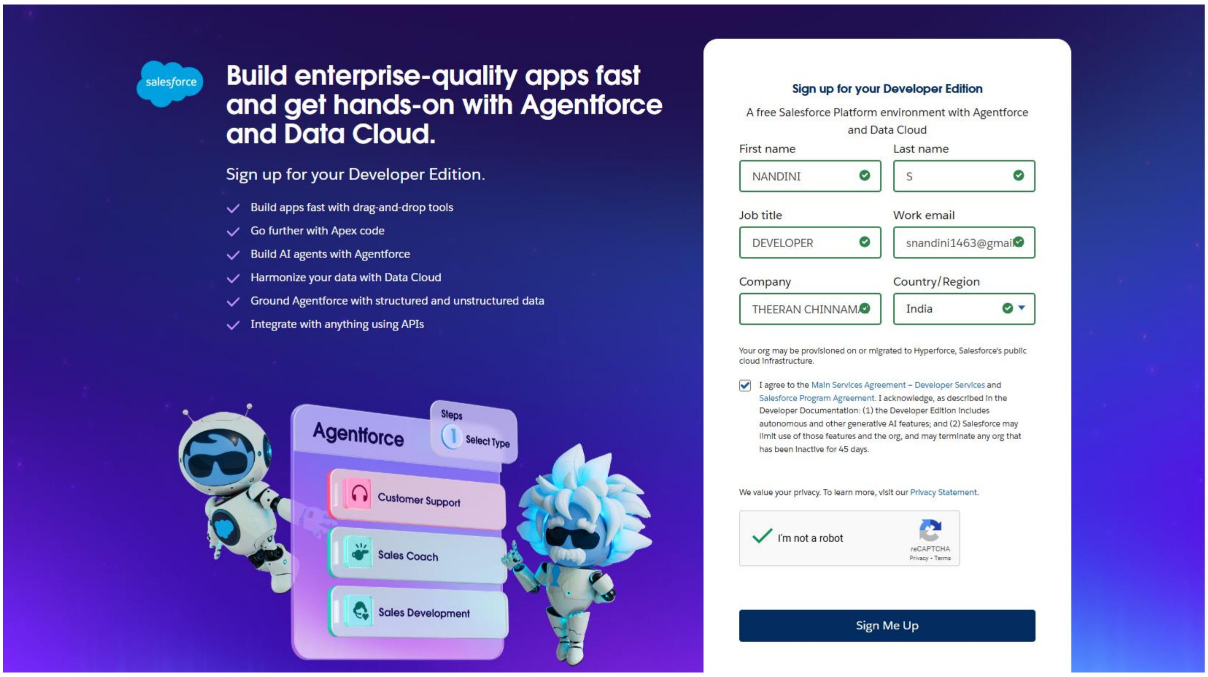
☑ Benefits:

- Improved customer satisfaction through better service tracking and communication.
- Reduced errors and time in managing inventory and billing.
- Enhanced marketing through targeted messages and offers.
- Increased efficiency and profitability through automation and data-driven insights.

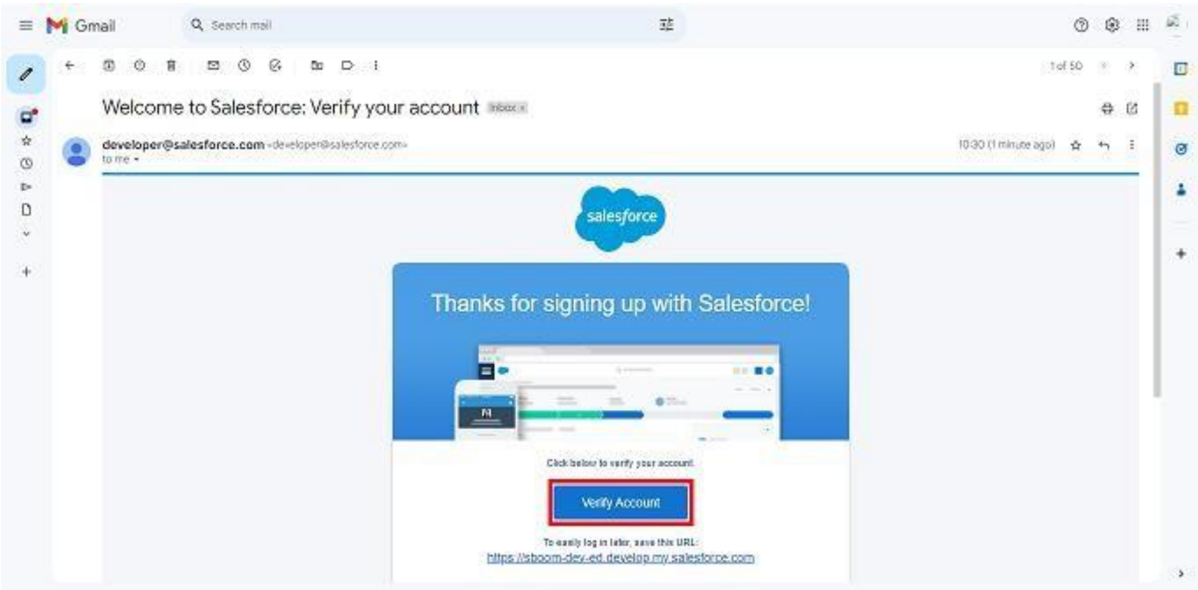
DEVELOPMENT PHASE:

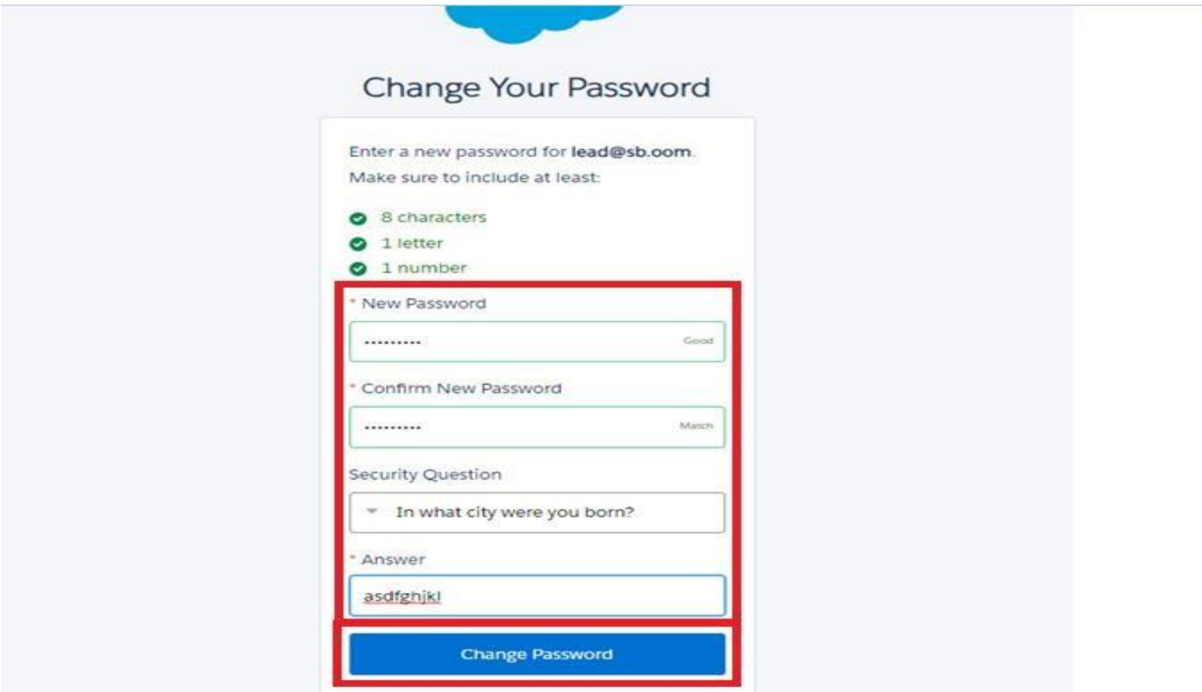
Creating Developer Account:

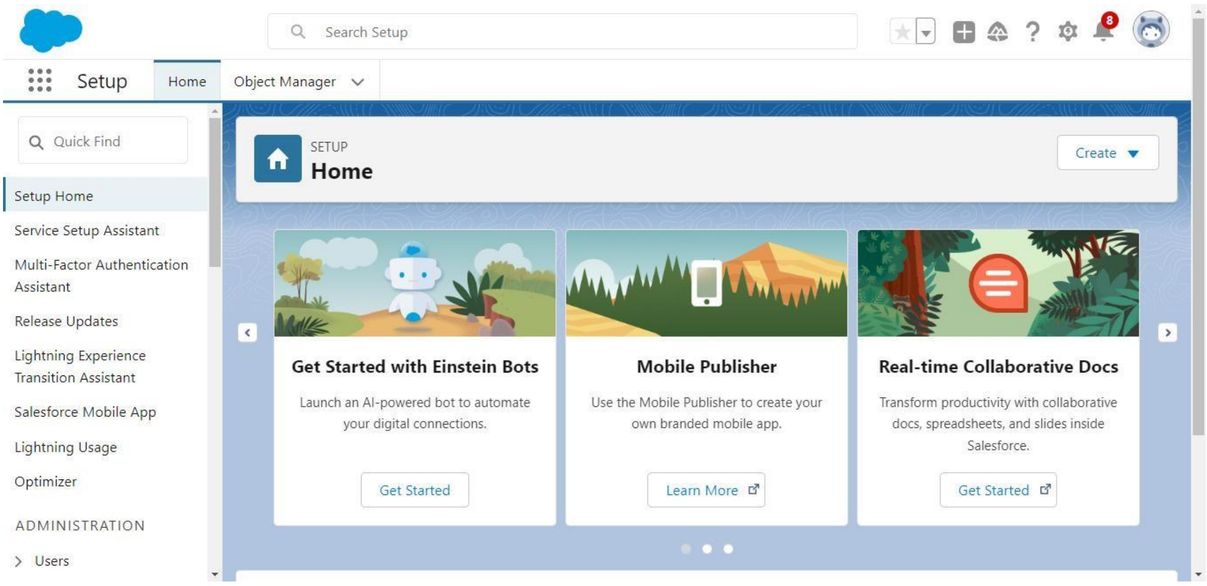
By using this URL: https://developer.salesforce.com/signup



Account Activation:




Change Your Password
Enter a new password for lead@sb.oom.
Make sure to include at least:
8 characters
1 letter
1 number
* New Password
Good
* Confirm New Password
Match
Security Question
In what city were you born?
* Answer
asdfghjkl
Change Password

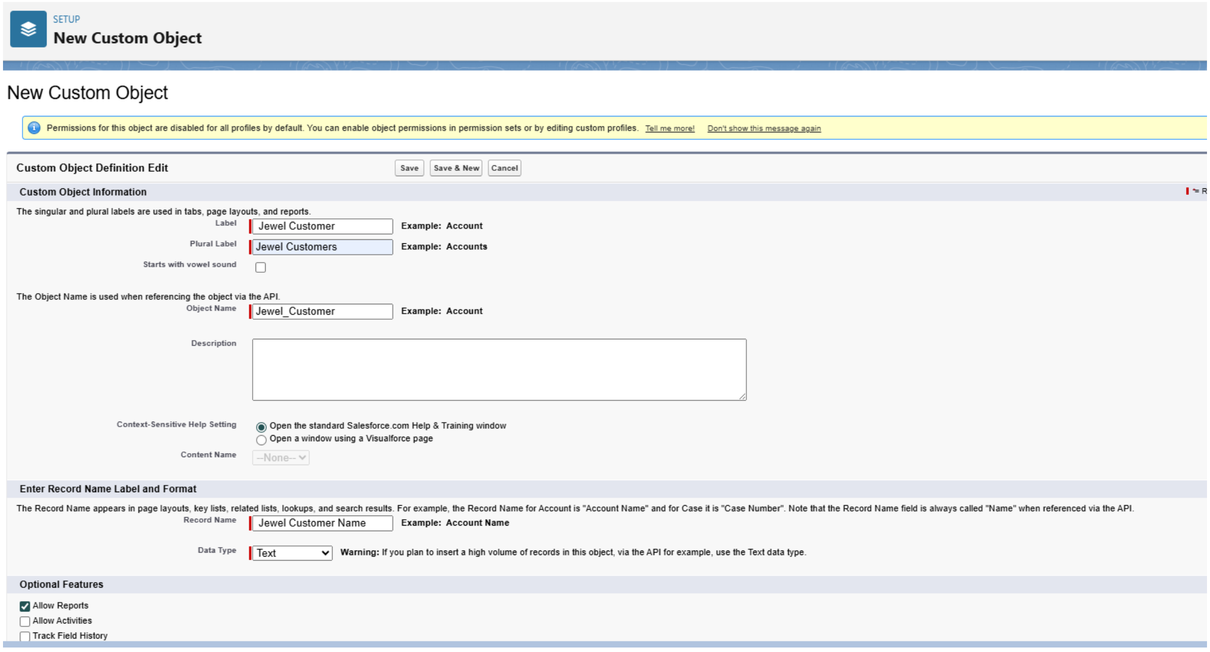

Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
SETUP
Home
Create
Get Started with Einstein Bots
Launch an AI-powered bot to automate your digital connections.
Get Started
Mobile Publisher
Use the Mobile Publisher to create your own branded mobile app.
Learn More
Real-time Collaborative Docs
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
Get Started

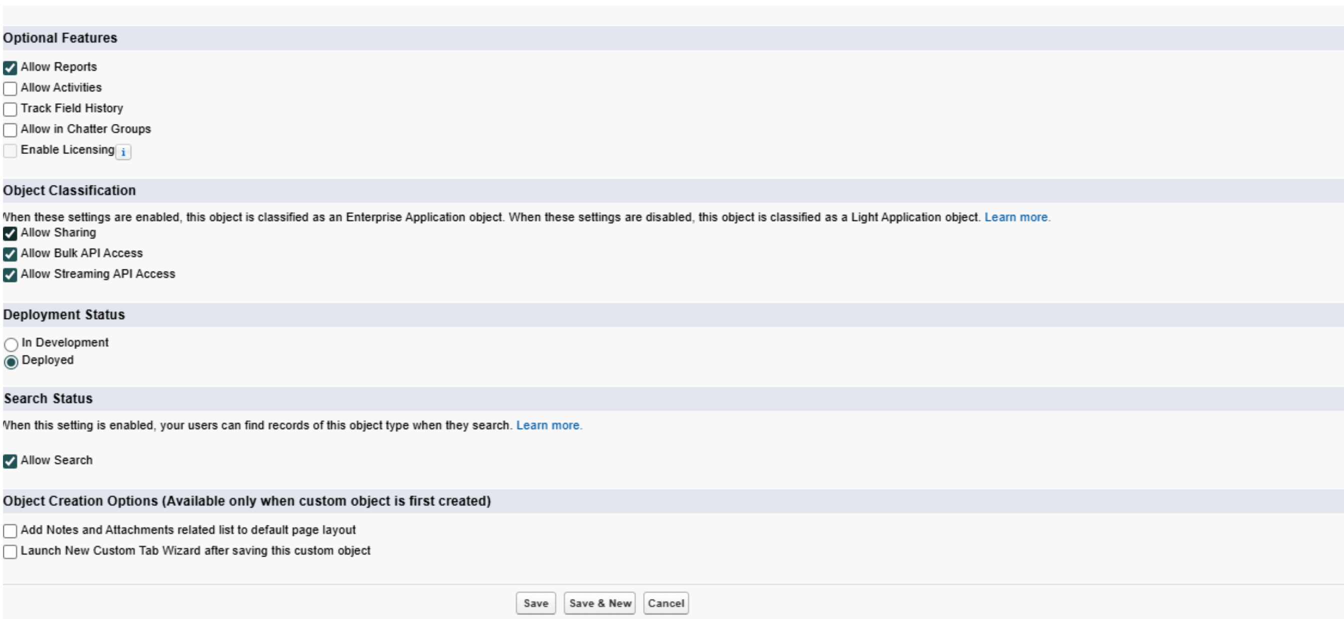
Objectives of the Project

1. **Enhance Customer Relationship Management**
   - To maintain comprehensive customer profiles including purchase history, preferences, contact details, and special dates for personalized services.
2. **Streamline Sales and Order Processing**
   - To automate sales transactions, quotations, invoicing, and payment tracking to improve the overall customer buying experience.
3. **Efficient Inventory Management**
   - To enable real-time tracking and management of jewelry items (gold, silver, diamonds, gemstones, etc.), including stock updates and alerts for low inventory.
4. **Simplify Repair and Service Handling**
   - To manage customer repair requests and track the status of jewelry service orders with automatic updates and notifications.
5. **Generate Accurate Billing and Invoices**
   - To produce professional, GST-compliant invoices with support for multiple payment methods and transaction histories.
6. **Improve Customer Engagement and Retention**
   - To send personalized SMS/email campaigns, reminders for important dates, promotional offers, and festive greetings to strengthen customer loyalty.
7. **Enable Role-Based Access and Security**
   - To manage different user roles (admin, sales staff, inventory manager) with appropriate access controls to ensure data security and operational efficiency.
8. **Provide Analytical Reports and Dashboards**
   - To offer real-time reports on sales, inventory, and customer activity for better business decisions and strategy planning.
9. **Ensure Data Backup and Reliability**
   - To maintain secure data storage with backup features to prevent data loss and ensure business continuity.
10. **Create a Scalable and User-Friendly System**
11. To build an intuitive, scalable application that can adapt to the growing needs of a jewelry business—whether small or large.

Create Jewel Customer Object

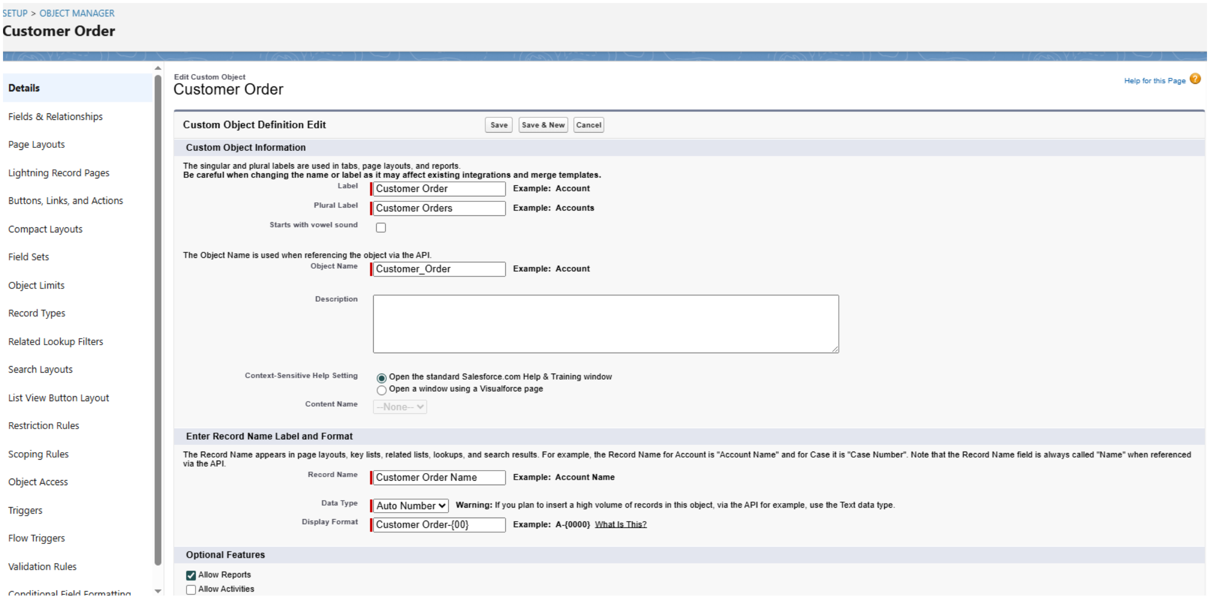
The purpose of creating a Jewel Customer custom object is to store and manage information about Customer.

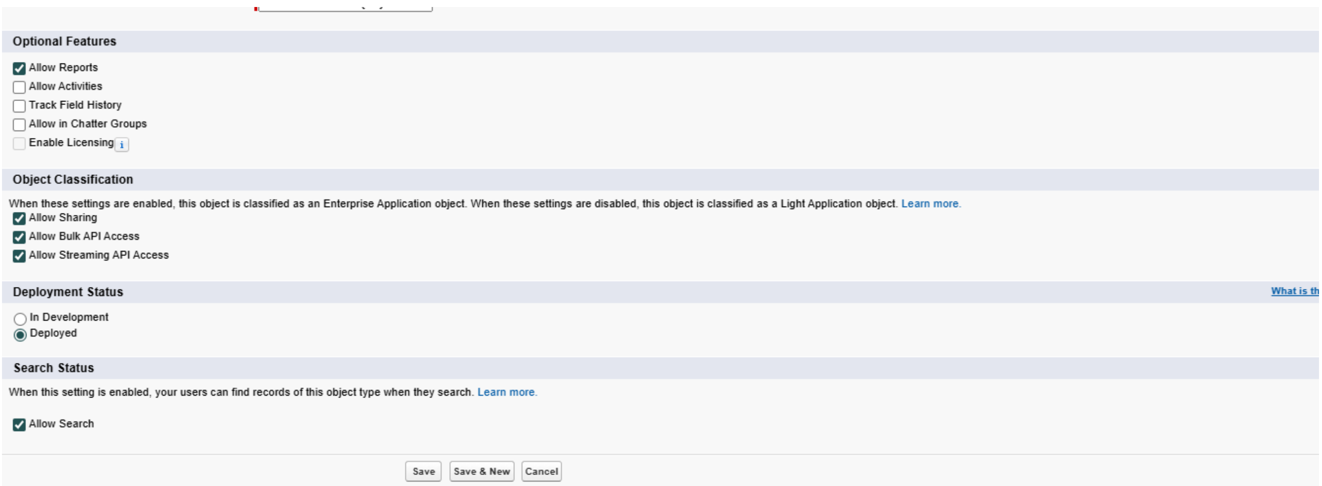




Create Item Object

Customer order





, Price, Billing objects

Tabs:

A **Tab** is a user interface element used to

- **Create and view records** for objects.
- **Navigate** easily through Salesforce applications.

Types of Tabs in Salesforce:

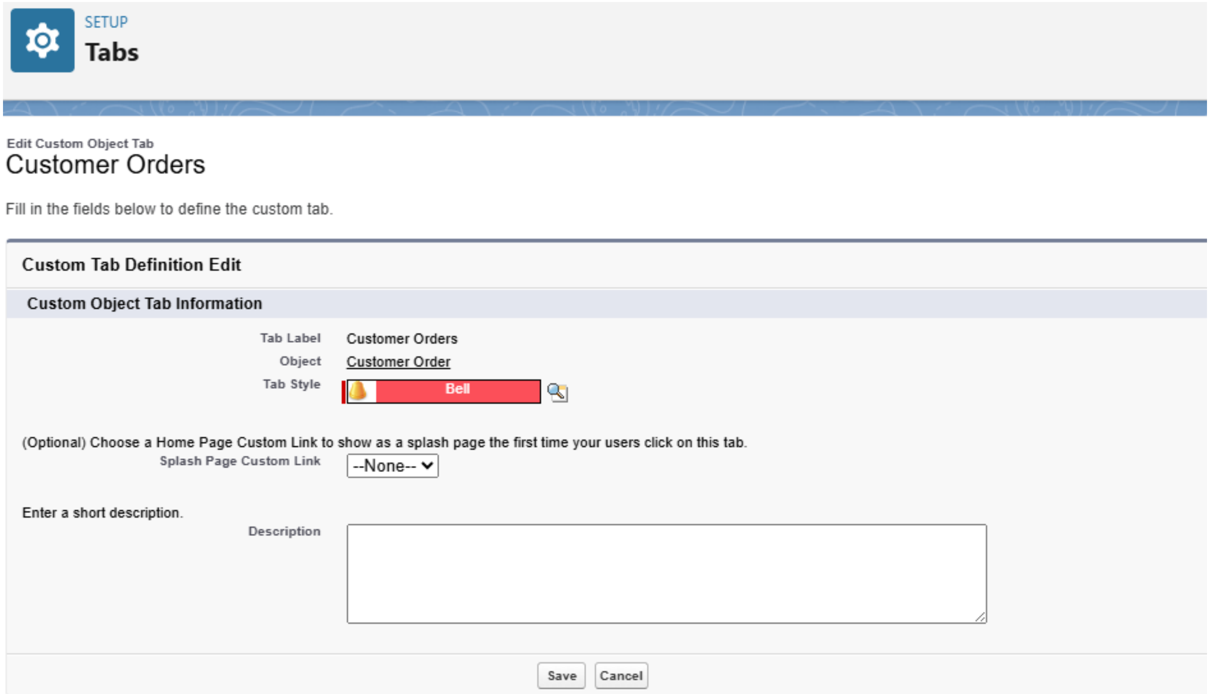
1. **Custom Tabs**
   - Interface for custom objects you create.
   - Behave like standard tabs (e.g., Accounts, Contacts).
2. **Web Tabs**
   - Display **external web content** or applications inside Salesforce.
   - Useful for quick access to frequently used web tools.
3. **Visualforce Tabs**
   - Display **Visualforce pages**.
   - Useful for custom UI or logic.
4. **Lightning Component Tabs**
   - Add **Lightning components** to the navigation menu in Lightning Experience and Salesforce mobile app.
5. **Lightning Page Tabs**
   - Add **Lightning Pages** to mobile app navigation.
   - **Note**: Do not appear on the "All Tabs" page or in the "Available Tabs" list during app customization.

Use Case (Jewel Management CRM Application)

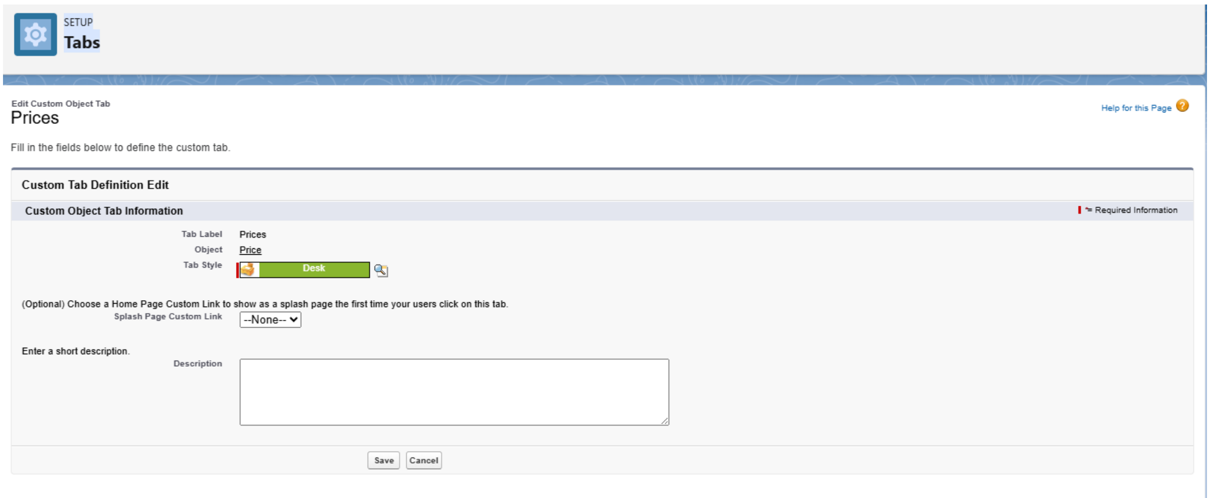
- Creating **Objects** to store **Jewels data** is a primary step.
- To allow **Owners (e.g., Goldsmiths)** to **access this data**, Admin needs to **create Tabs**.
- Benefits of Tabs:
  - Improved **user experience**.
  - Easier **navigation**.
  - Quick access to **critical data**.
  - Better **productivity** and **efficient utilization** of Salesforce.

To create a Tab:(Item)

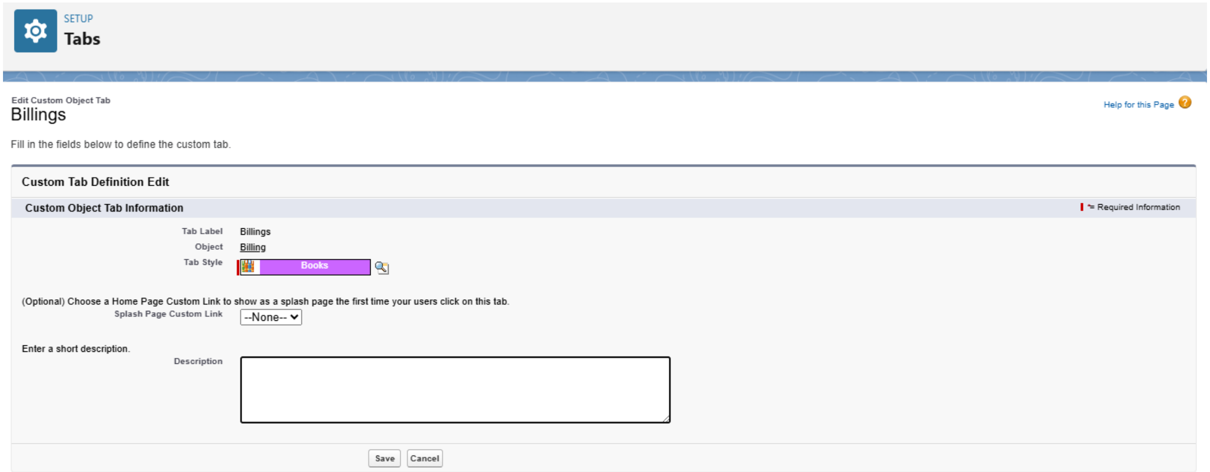
Customer Order



Price:

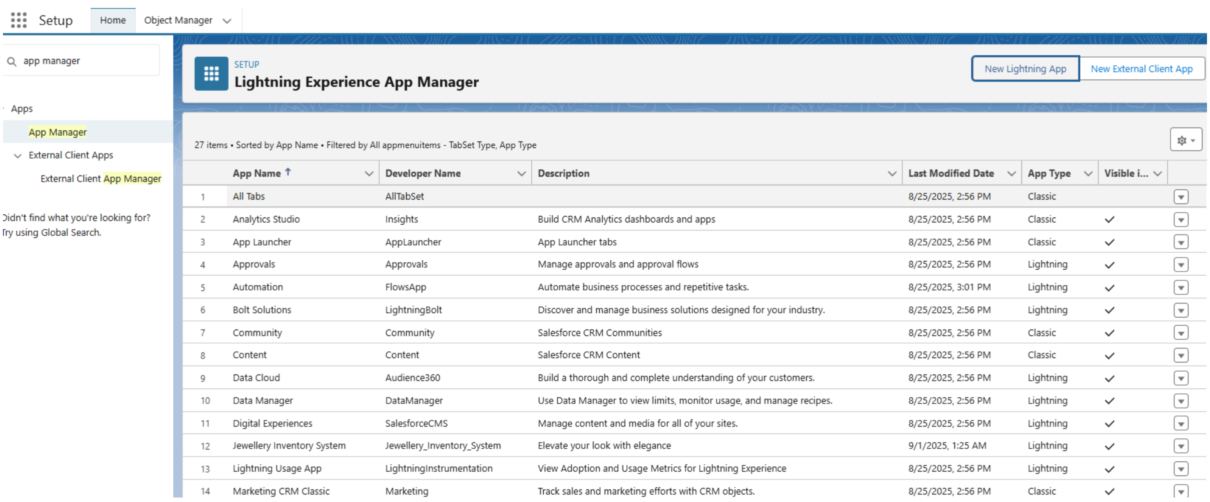


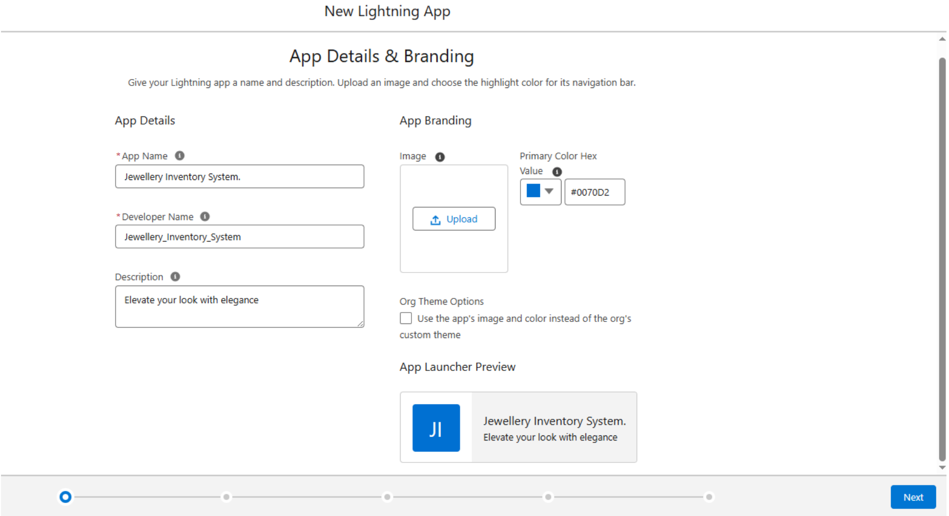
Billing:

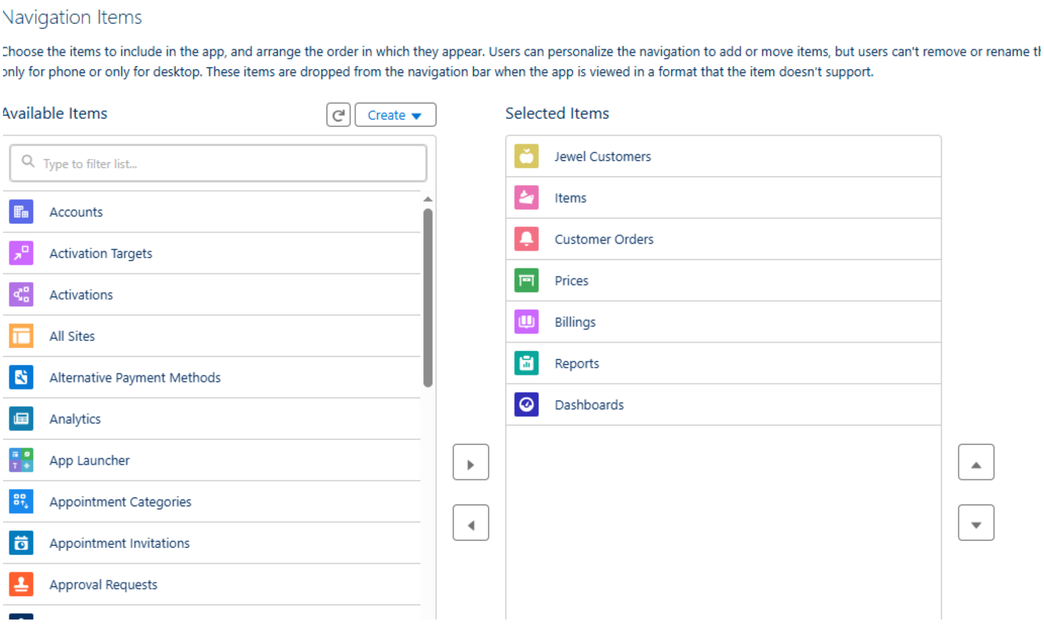


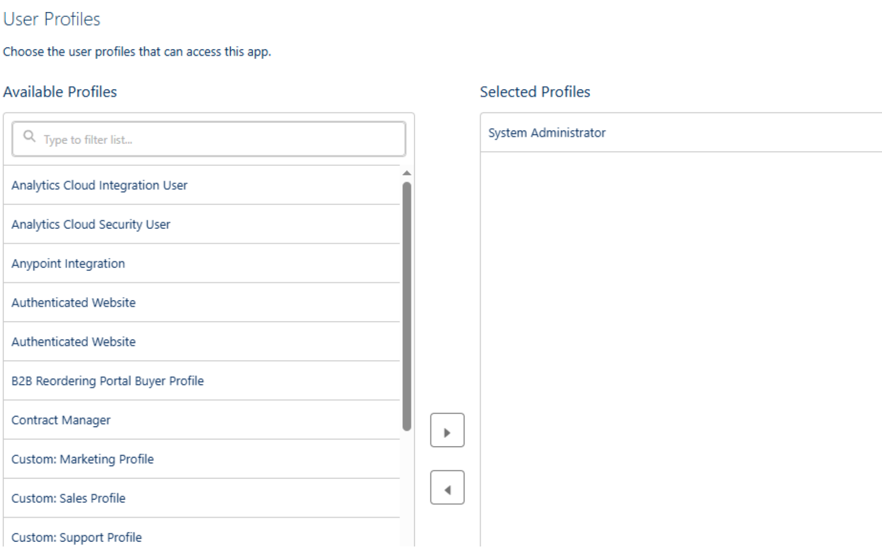
Create a Lightning App:

New lightning App:

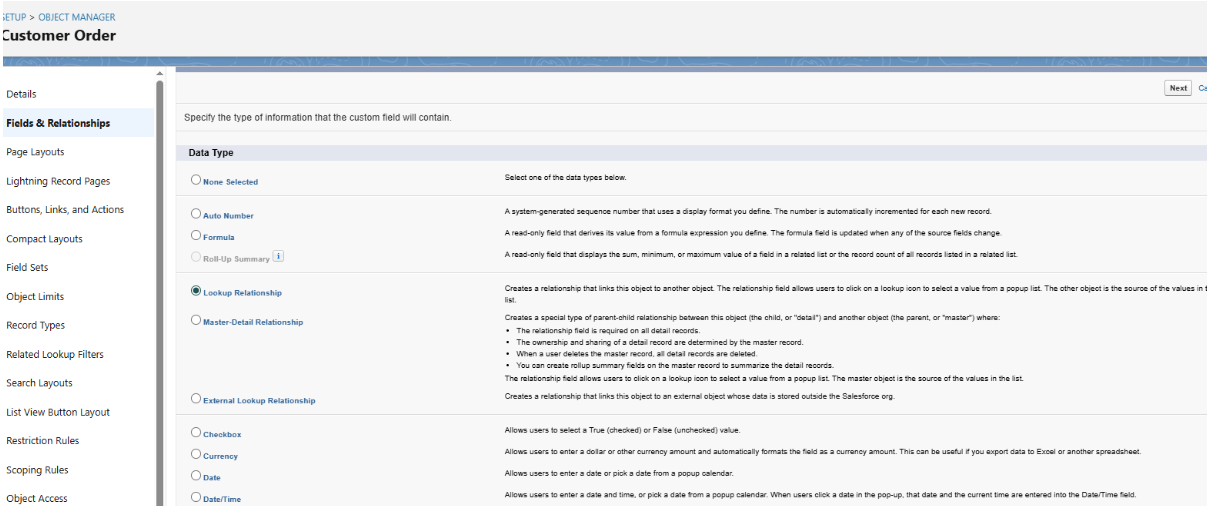


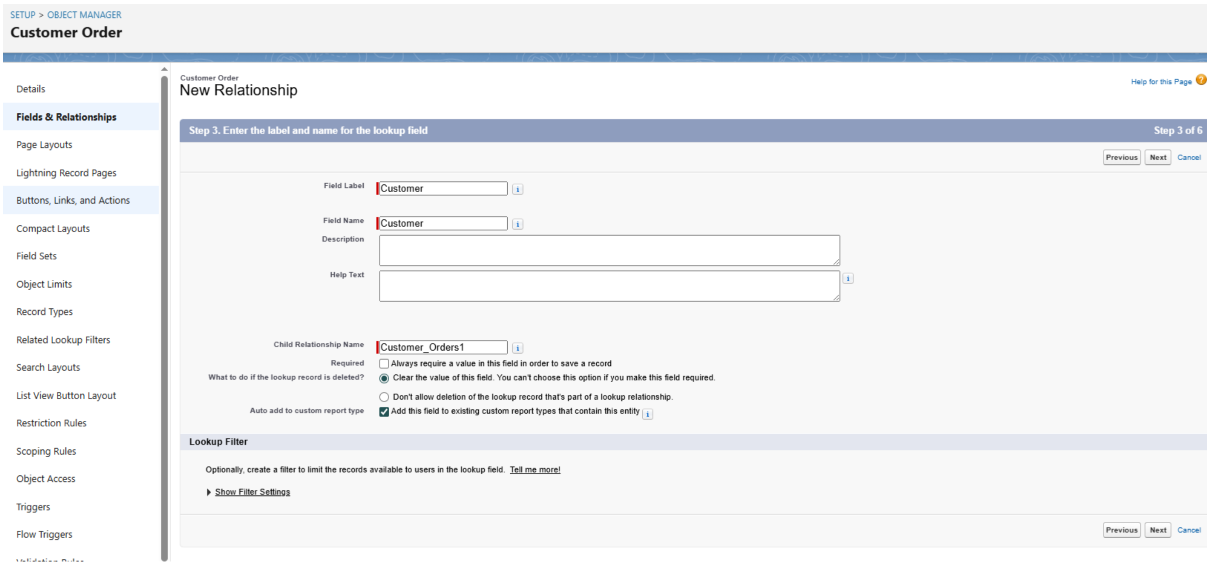

New Lightning App
App Details & Branding
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
App Branding
* App Name
Jewellery Inventory System.
* Developer Name
Jewellery_Inventory_System
Description
Elevate your look with elegance
Image
Upload
Primary Color Hex Value
#0070D2
Org Theme Options
Use the app's image and color instead of the org's custom theme
App Launcher Preview
JI
Jewellery Inventory System.
Elevate your look with elegance
Next

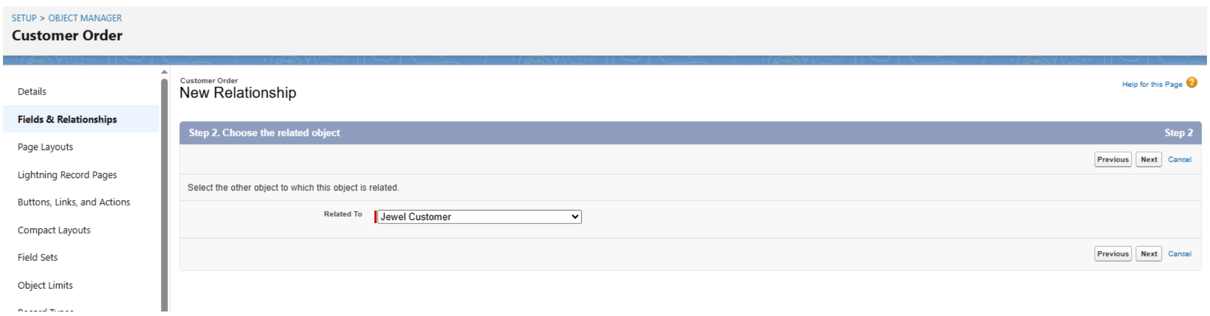

Navigation Items
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename tl
only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
Available Items
Create
Type to filter list...
Accounts
Activation Targets
Activations
All Sites
Alternative Payment Methods
Analytics
App Launcher
Appointment Categories
Appointment Invitations
Approval Requests
Selected Items
Jewel Customers
Items
Customer Orders
Prices
Billings
Reports
Dashboards

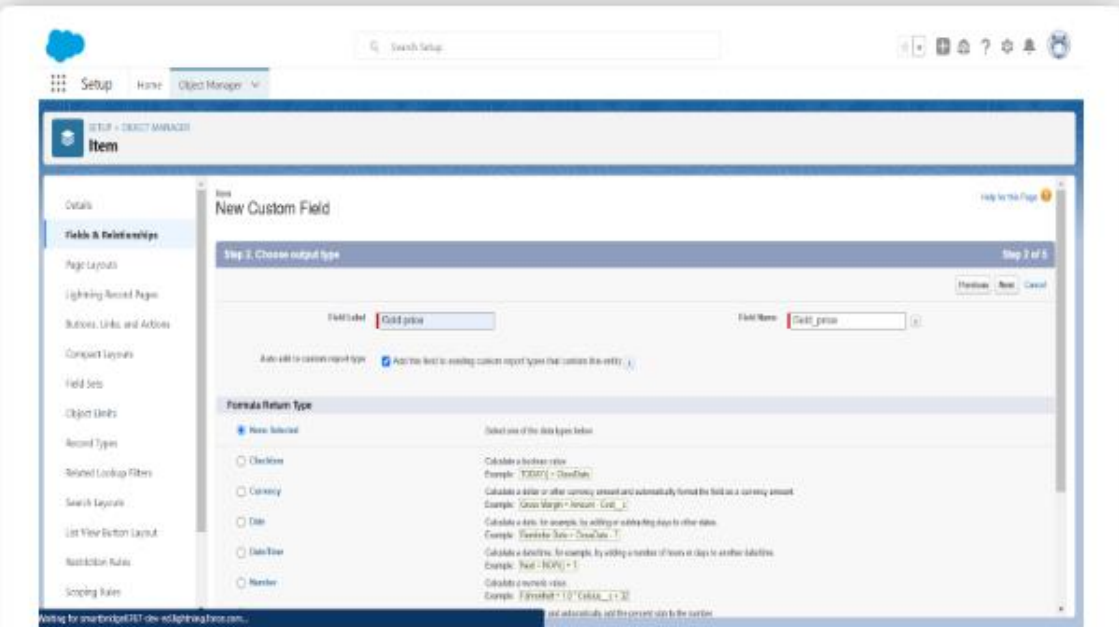

User Profiles
Choose the user profiles that can access this app.
Available Profiles
Type to filter list...
Analytics Cloud Integration User
Analytics Cloud Security User
Anypoint Integration
Authenticated Website
Authenticated Website
B2B Reordering Portal Buyer Profile
Contract Manager
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Selected Profiles
System Administrator

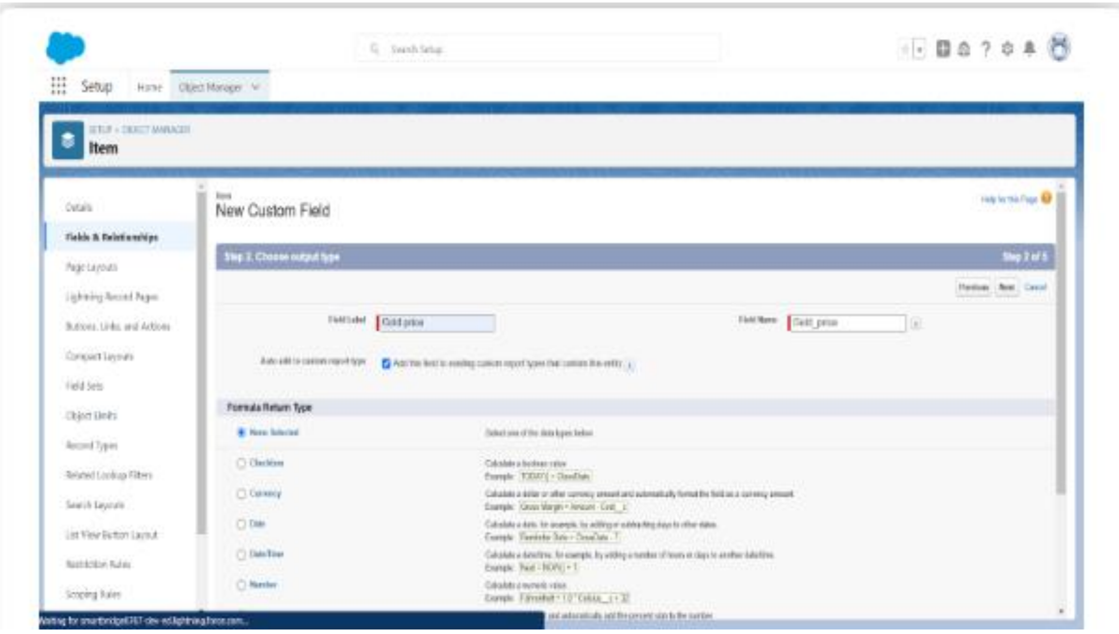
Creating Lookup Relationship:



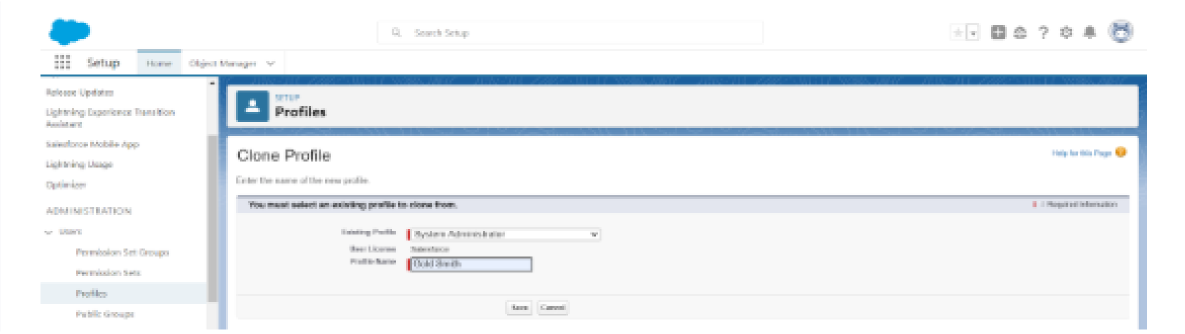


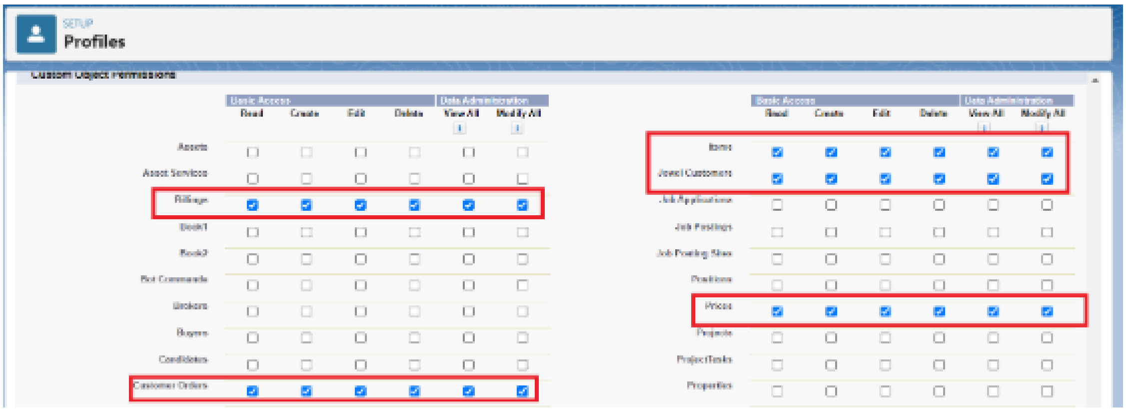



Setup
Home
Object Manager
Item
New Custom Field
Step 2. Choose output type
Field Label
Gold price
Field Name
Gold_price
Formula Return Type
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules

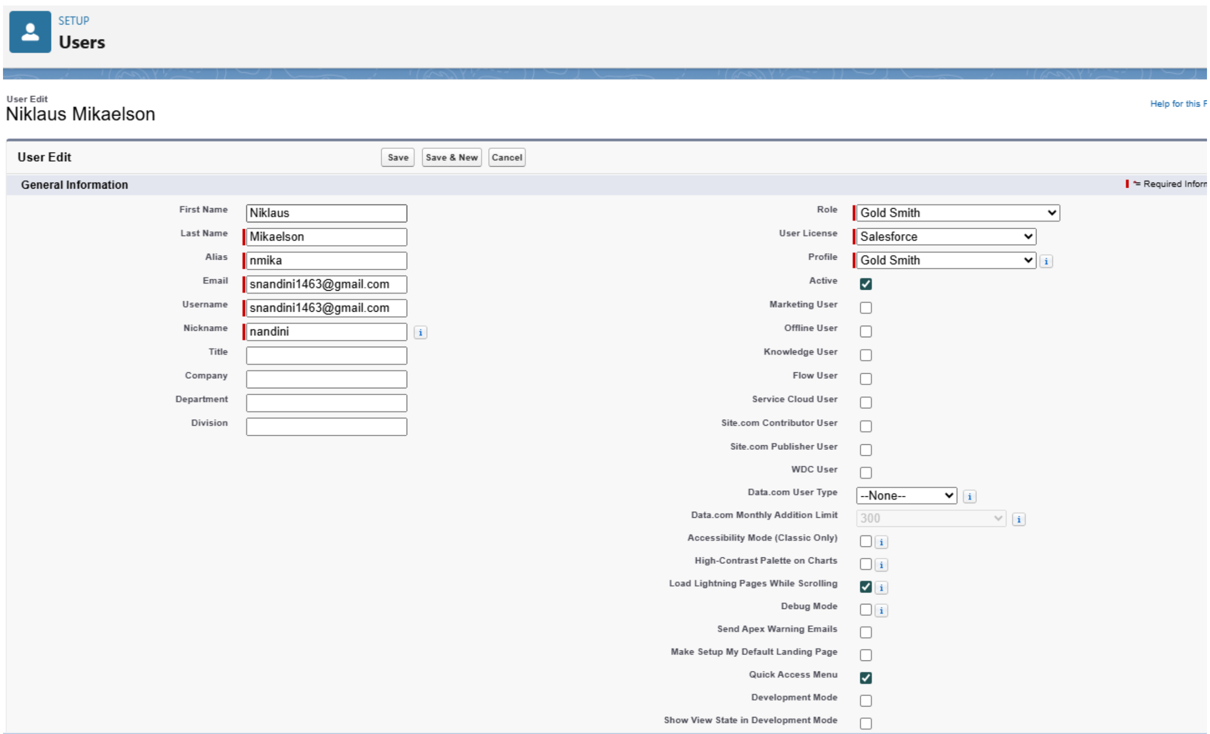

Setup
Home
Object Manager
Item
New Custom Field
Step 2. Choose output type
Field Label
Gold price
Field Name
Gold_price
Formula Return Type
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules

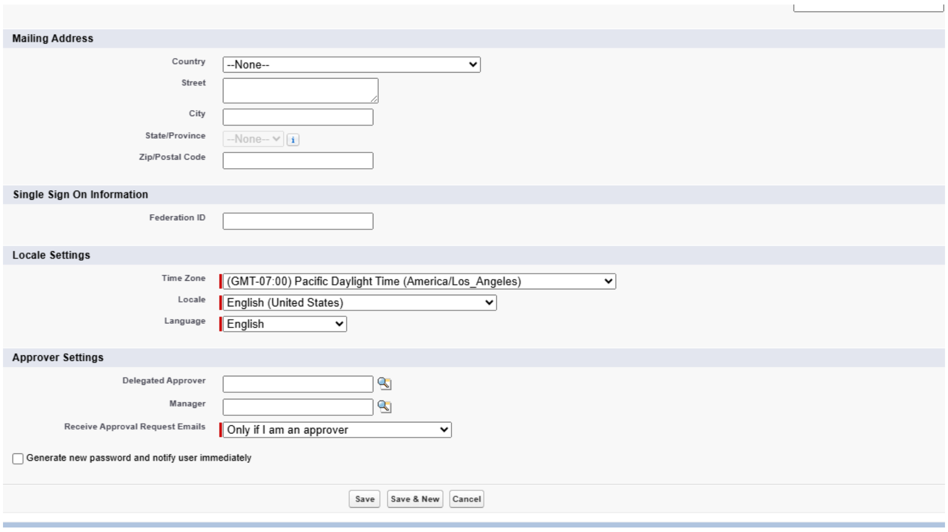
Gold Smith Profile

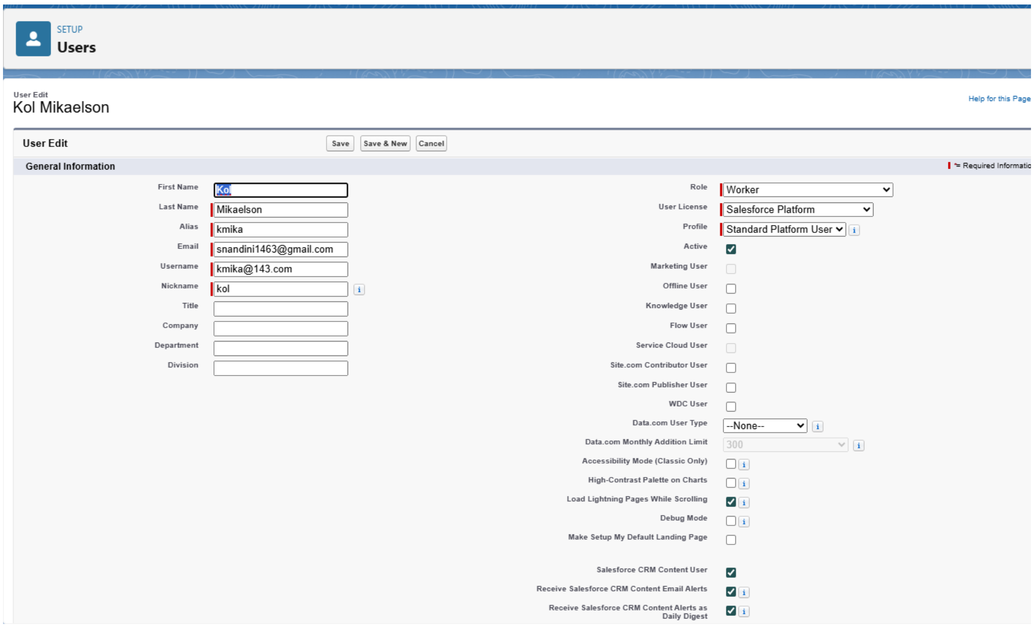


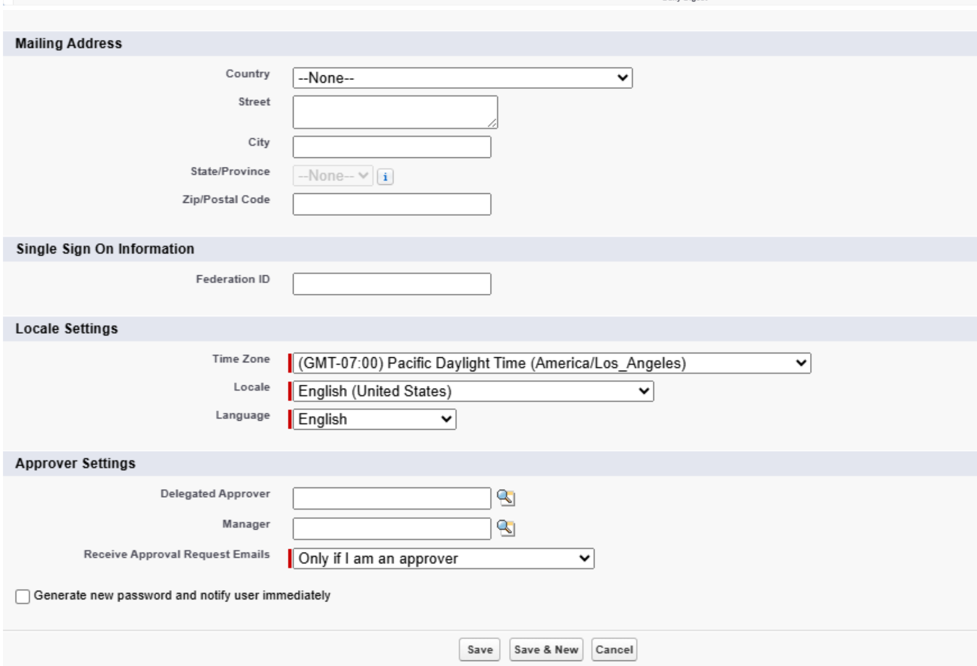


Users:



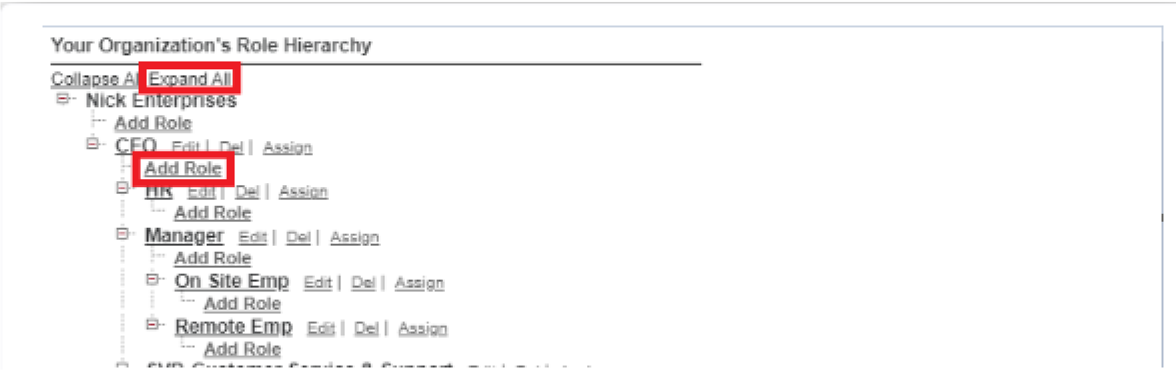

Mailing Address
Country
--None--
Street
City
State/Province
--None--
Zip/Postal Code
Single Sign On Information
Federation ID
Locale Settings
Time Zone
(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Locale
English (United States)
Language
English
Approver Settings
Delegated Approver
Manager
Receive Approval Request Emails
Only if I am an approver
Generate new password and notify user immediately
Save
Save & New
Cancel

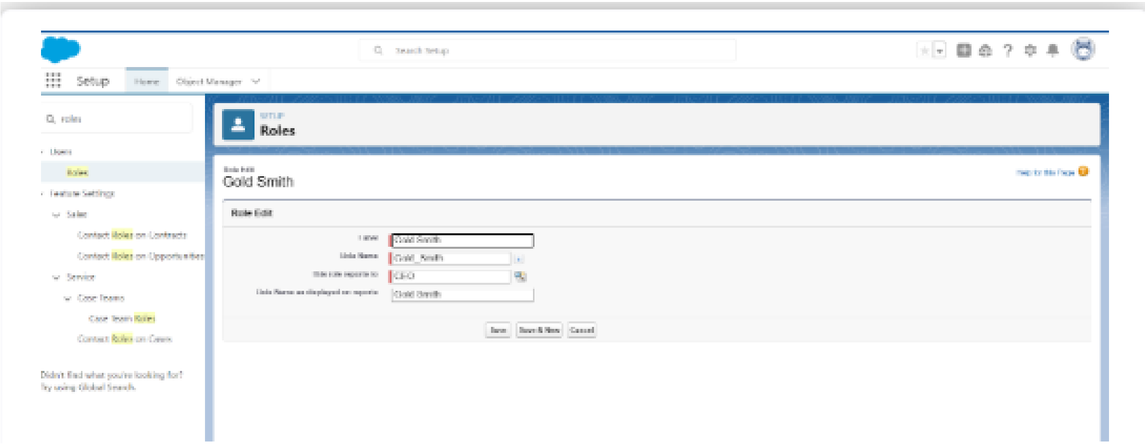

SETUP
Users
User Edit
Kol Mikaelson
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
Kol
Last Name
Mikaelson
Alias
kmika
Email
snandini1463@gmail.com
Username
kmika@143.com
Nickname
kol
Title
Company
Department
Division
Role
Worker
User License
Salesforce Platform
Profile
Standard Platform User
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type
--None--
Data.com Monthly Addition Limit
300
Accessibility Mode (Classic Only)
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
Debug Mode
Make Setup My Default Landing Page
Salesforce CRM Content User
Receive Salesforce CRM Content Email Alerts
Receive Salesforce CRM Content Alerts as Daily Digest


Mailing Address
Country
--None--
Street
City
State/Province
--None--
Zip/Postal Code
Single Sign On Information
Federation ID
Locale Settings
Time Zone
(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Locale
English (United States)
Language
English
Approver Settings
Delegated Approver
Manager
Receive Approval Request Emails
Only if I am an approver
Generate new password and notify user immediately
Save
Save & New
Cancel

Roles:

Creating Gold Smith Role

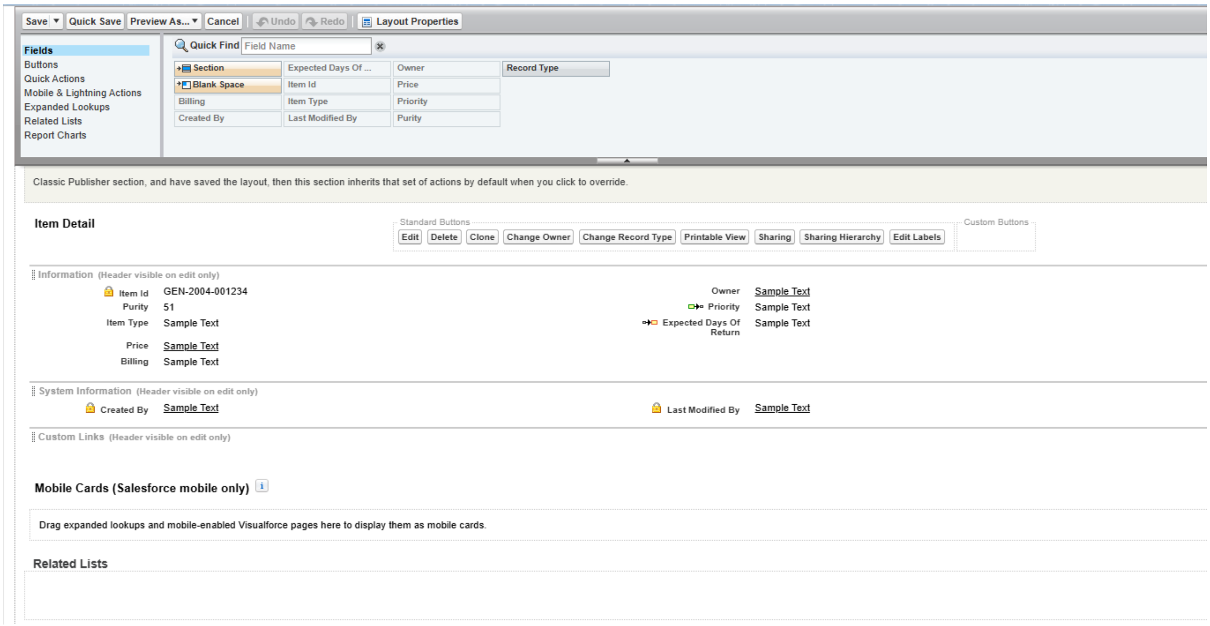




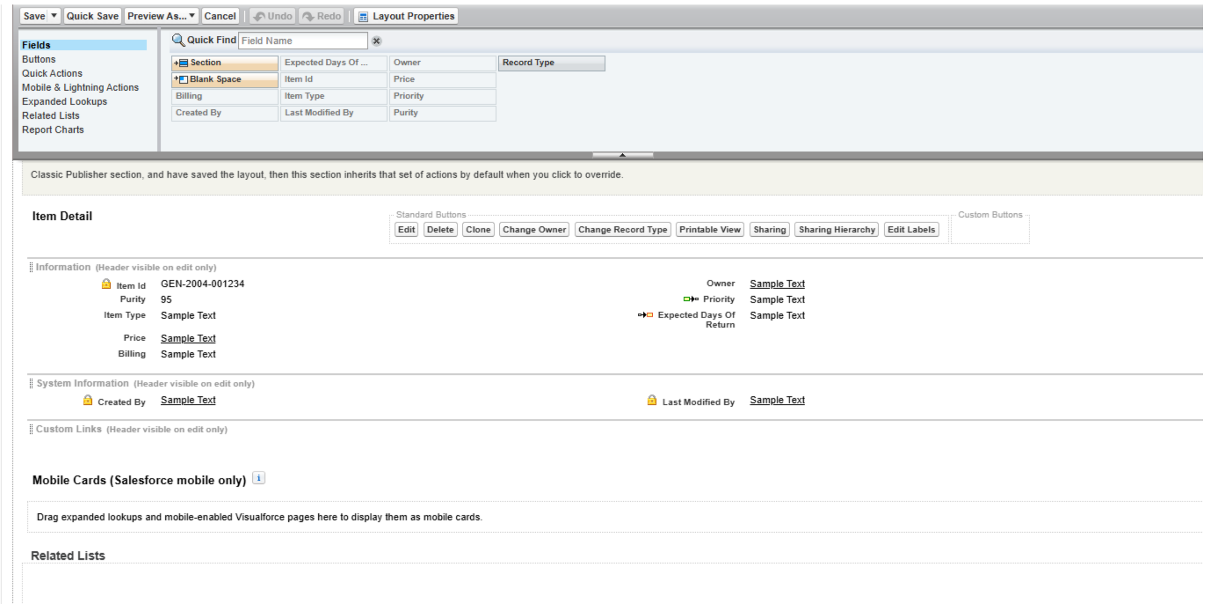
Page layouts

Page Layout in Salesforce allows us to customise the design and organise detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

To Create a Gold Page layout



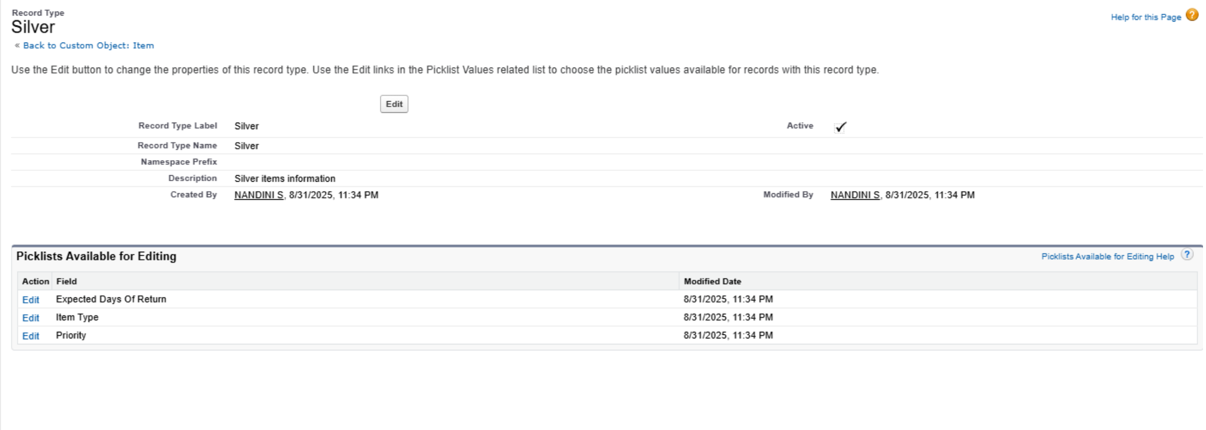
To Create a Silver Page layout

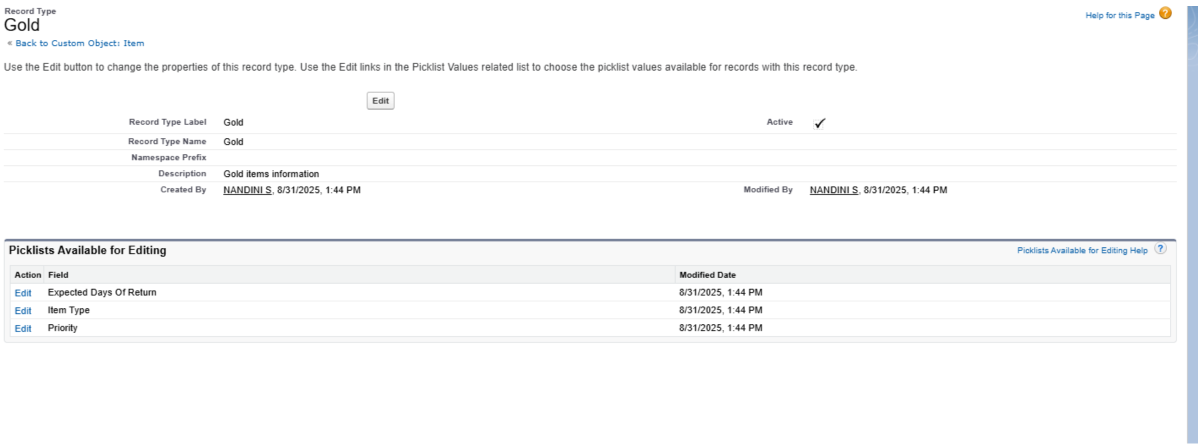


Record Types

Record Types are a way of grouping many records of one type for that object. These can be applied to any standard or custom object, and allow you to have a different page layout, fields, required fields, and picklist values. Record types allow administrators to create a different page layout with custom picklist fields and values for the same business process and various business processes.

To create a Record Type



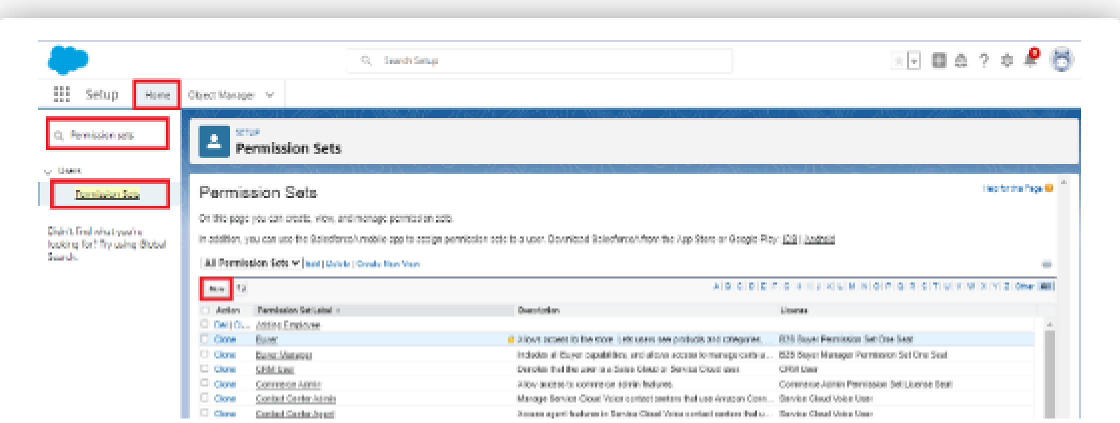


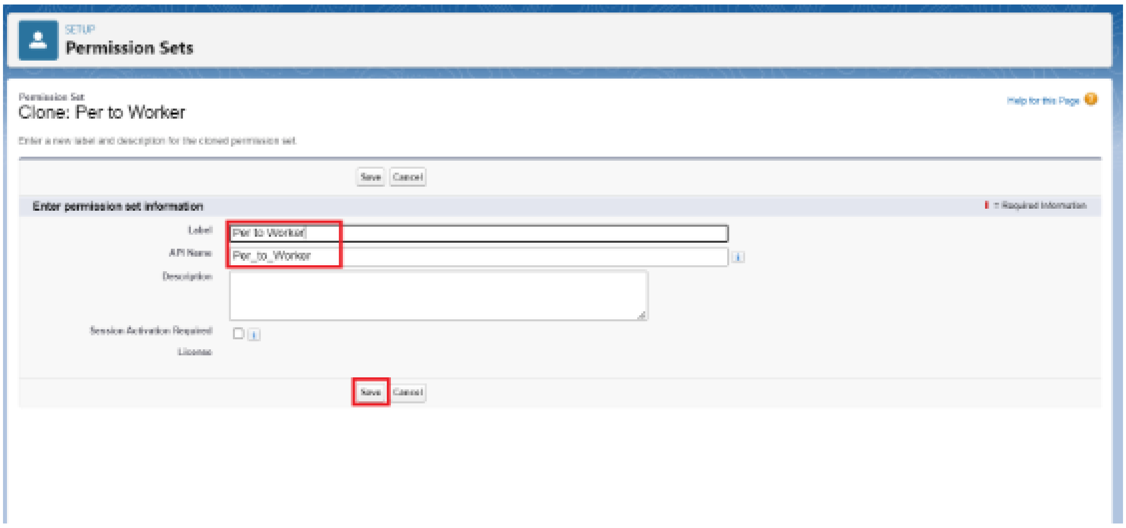
Permission sets

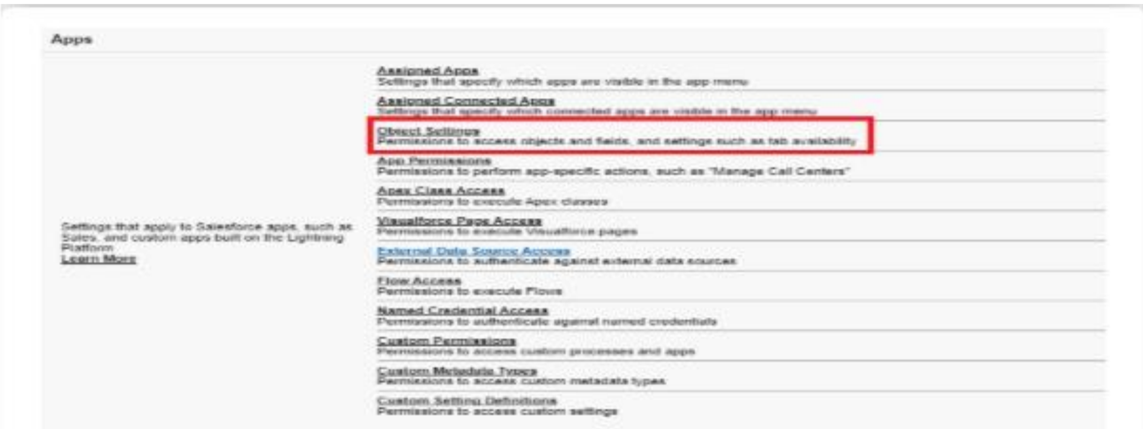
A standard permission set consists of a group of common permissions for a particular feature associated with a permission set licence.

Creating permission set

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets.

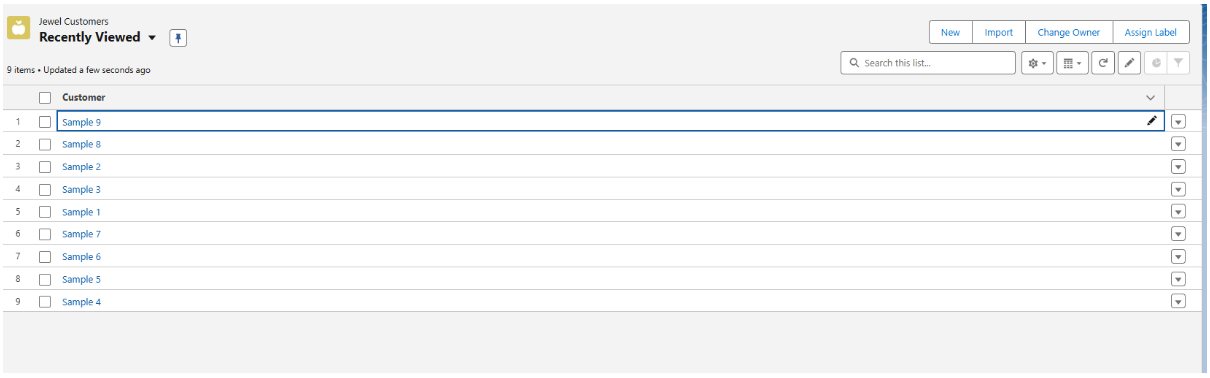




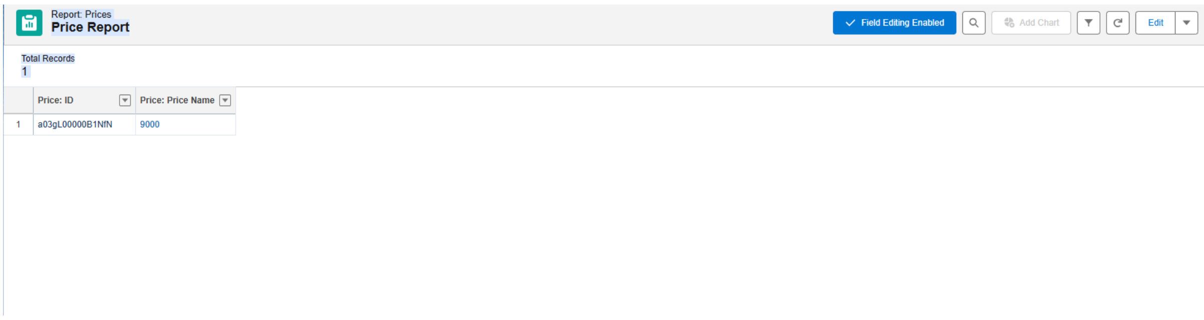


User Adoption

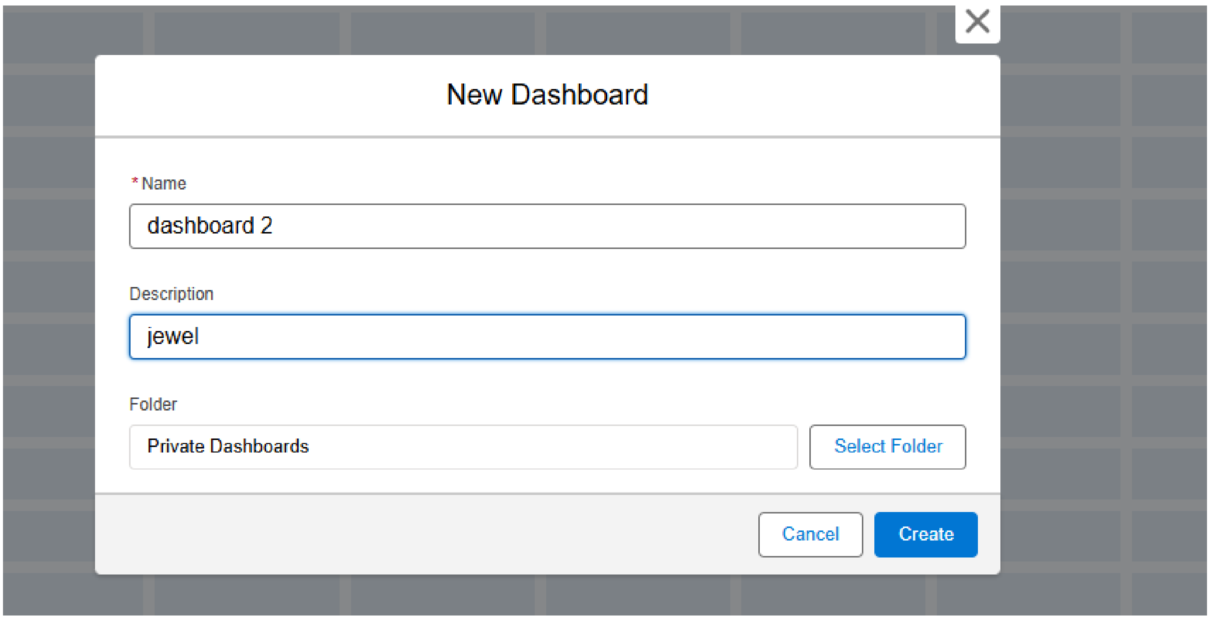
Create a Record (Jewel Customer)

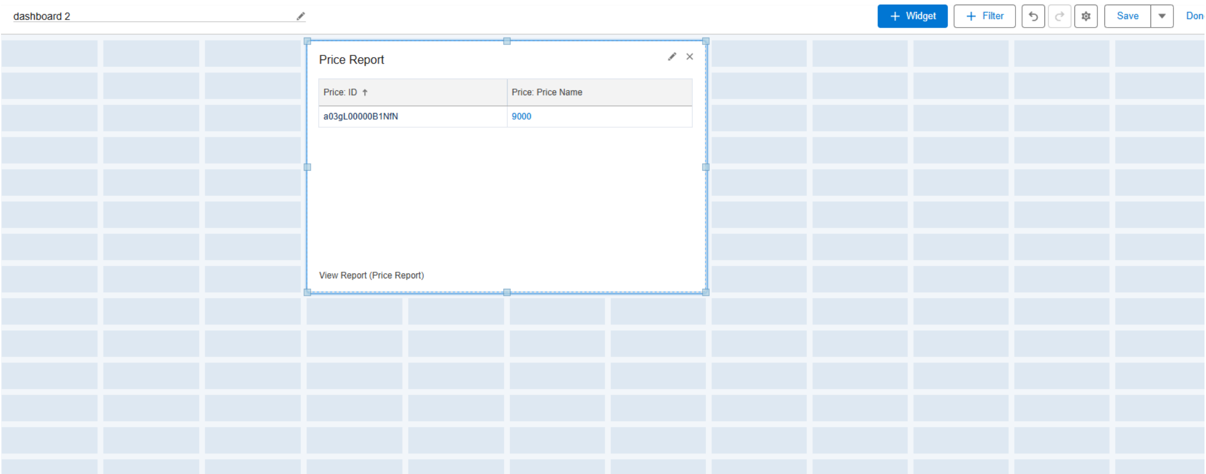


Reports



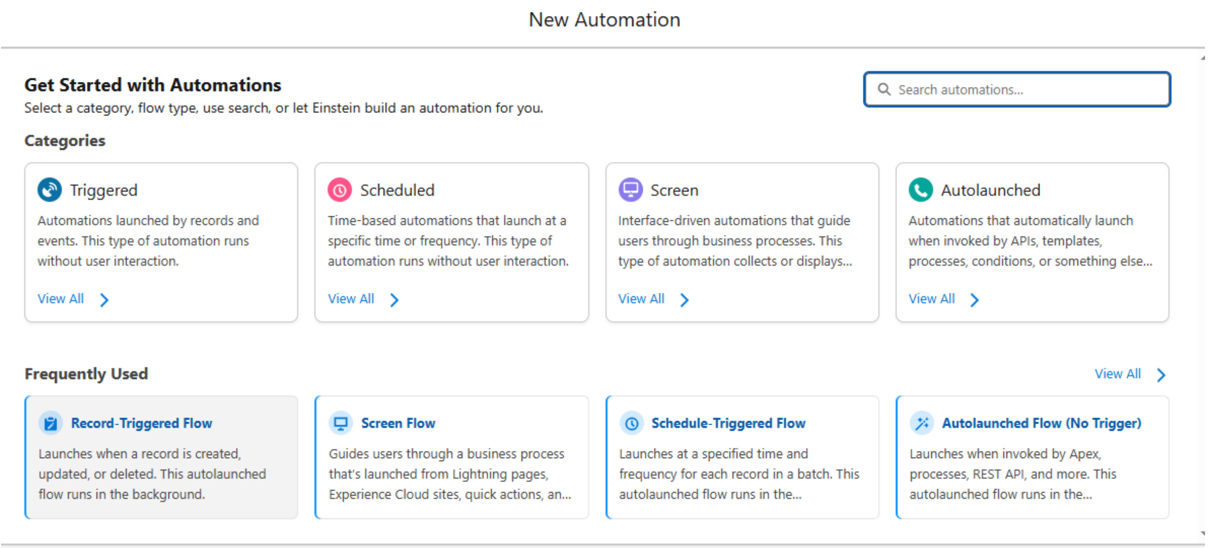
Dashboards

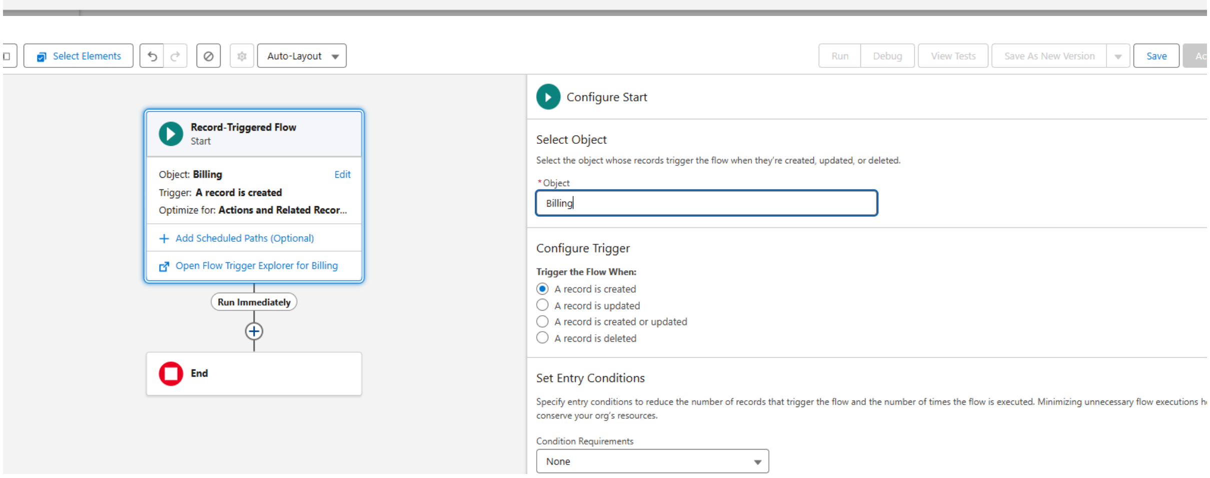


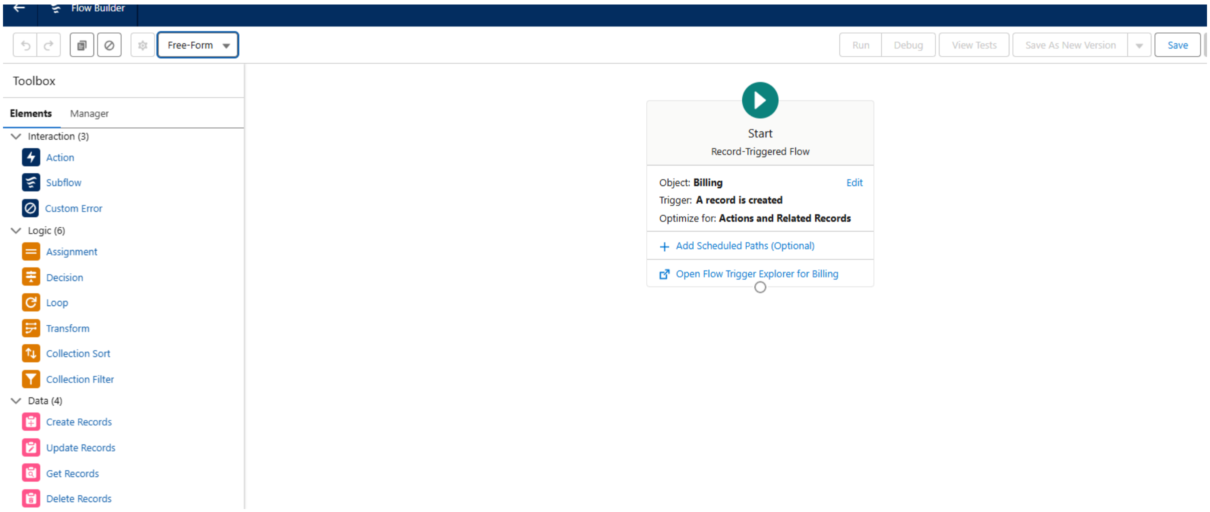


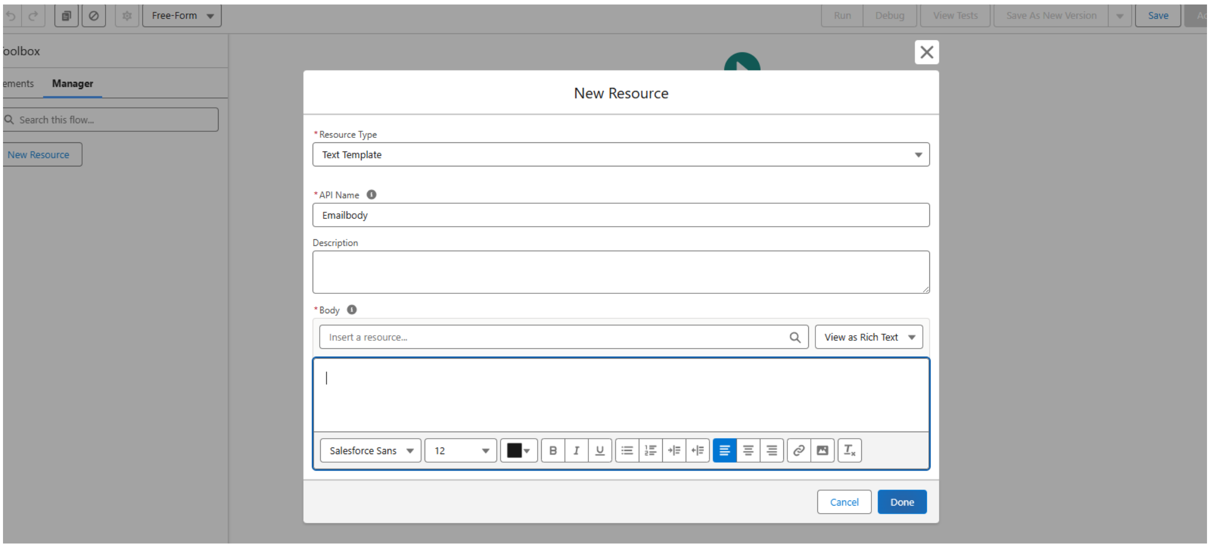
Flows

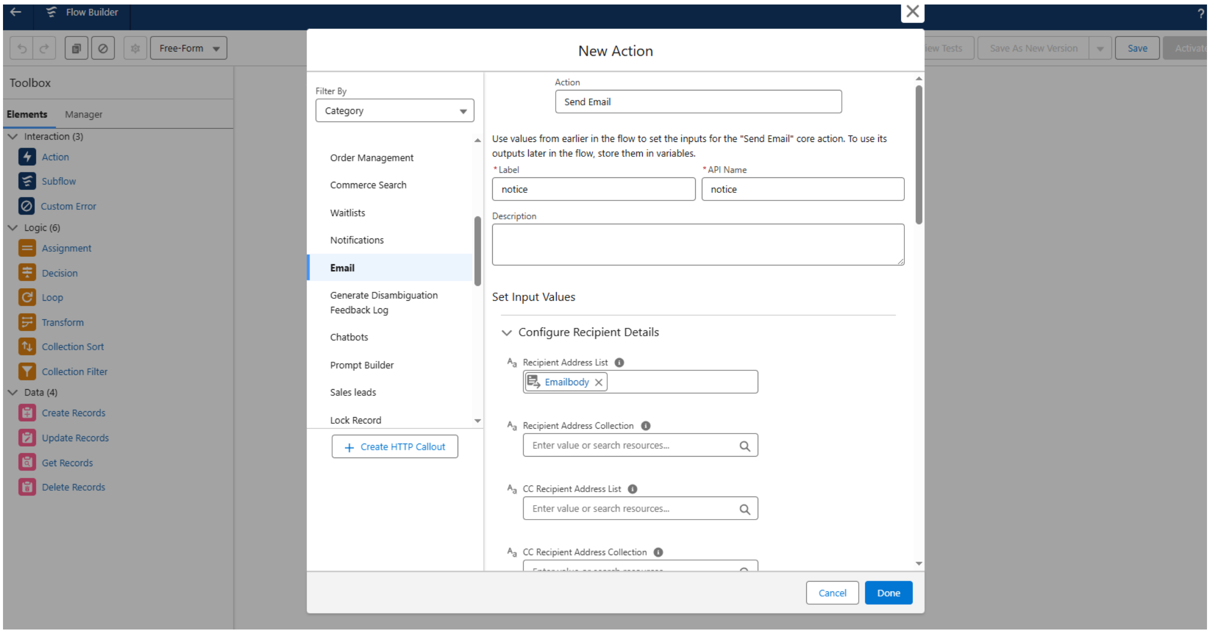
a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

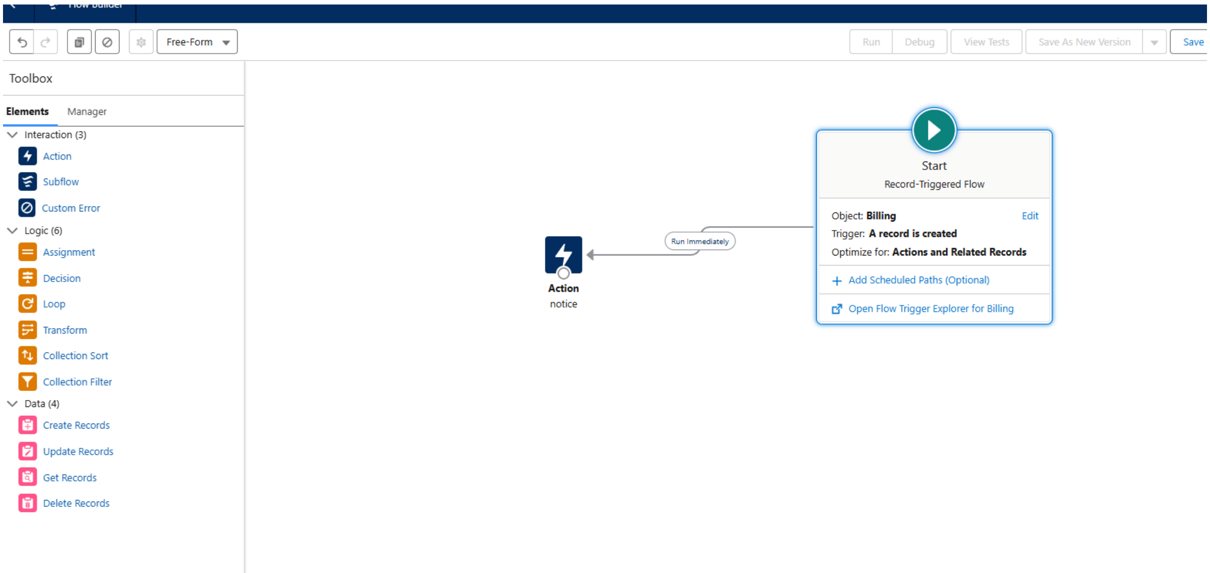





Flow Builder
Free-Form
Run
Debug
View Tests
Save As New Version
Save
Toolbox
Elements
Manager
Interaction (3)
Action
Subflow
Custom Error
Logic (6)
Assignment
Decision
Loop
Transform
Collection Sort
Collection Filter
Data (4)
Create Records
Update Records
Get Records
Delete Records
Start
Record-Triggered Flow
Object: Billing
Edit
Trigger: A record is created
Optimize for: Actions and Related Records
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Billing


Free-Form
Run
Debug
View Tests
Save As New Version
Save
oolbox
ements
Manager
Search this flow...
New Resource
New Resource
*Resource Type
Text Template
*API Name
Emailbody
Description
*Body
Insert a resource...
View as Rich Text
Salesforce Sans
12
Cancel
Done


Flow Builder
Free-Form
Toolbox
Elements
Manager
Interaction (3)
Action
Subflow
Custom Error
Logic (6)
Assignment
Decision
Loop
Transform
Collection Sort
Collection Filter
Data (4)
Create Records
Update Records
Get Records
Delete Records
New Action
Filter By
Category
Order Management
Commerce Search
Waitlists
Notifications
Email
Generate Disambiguation Feedback Log
Chatbots
Prompt Builder
Sales leads
Lock Record
Create HTTP Callout
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
Configure Recipient Details
Recipient Address List
Emailbody
Recipient Address Collection
Enter value or search resources...
CC Recipient Address List
Enter value or search resources...
CC Recipient Address Collection
Save As New Version
Save
Cancel
Done



Free-Form
Run
Debug
View Tests
Save As New Version
Save
Toolbox
Elements
Manager
Interaction (3)
Action
Subflow
Custom Error
Logic (6)
Assignment
Decision
Loop
Transform
Collection Sort
Collection Filter
Data (4)
Create Records
Update Records
Get Records
Delete Records
Start
Record-Triggered Flow
Object: Billing
Edit
Trigger: A record is created
Optimize for: Actions and Related Records
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Billing
Run Immediately
Action
notice