CRM JEWELLERY MANAGEMENT

College name: SHREE VENKATESHWARA ARTS AND SCIENCE COLLEGE

Code: brubd

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1. INTRODUCTION

1.1 Project Overview

A **Customer Relationship Management (CRM)** system tailored for the jewellery industry is designed to enhance how jewellery businesses interact with customers, manage inventory, and drive sales. Given the high-value nature of jewellery products and the need for personalized service, a specialized CRM helps streamline operations and build lasting customer loyalty.

1.2 Purpose

The purpose of this project is to develop a specialized Customer Relationship Management (CRM) system for the jewellery industry that enhances customer engagement, streamlines inventory and service management, and supports data-driven decision-making. By centralizing customer information, automating marketing efforts, and tracking high- value inventory, the CRM solution aims to improve operational efficiency, boost sales performance, and foster longterm customer loyalty in a competitive and detail-oriented market.

DEVELOPMENT PHASE

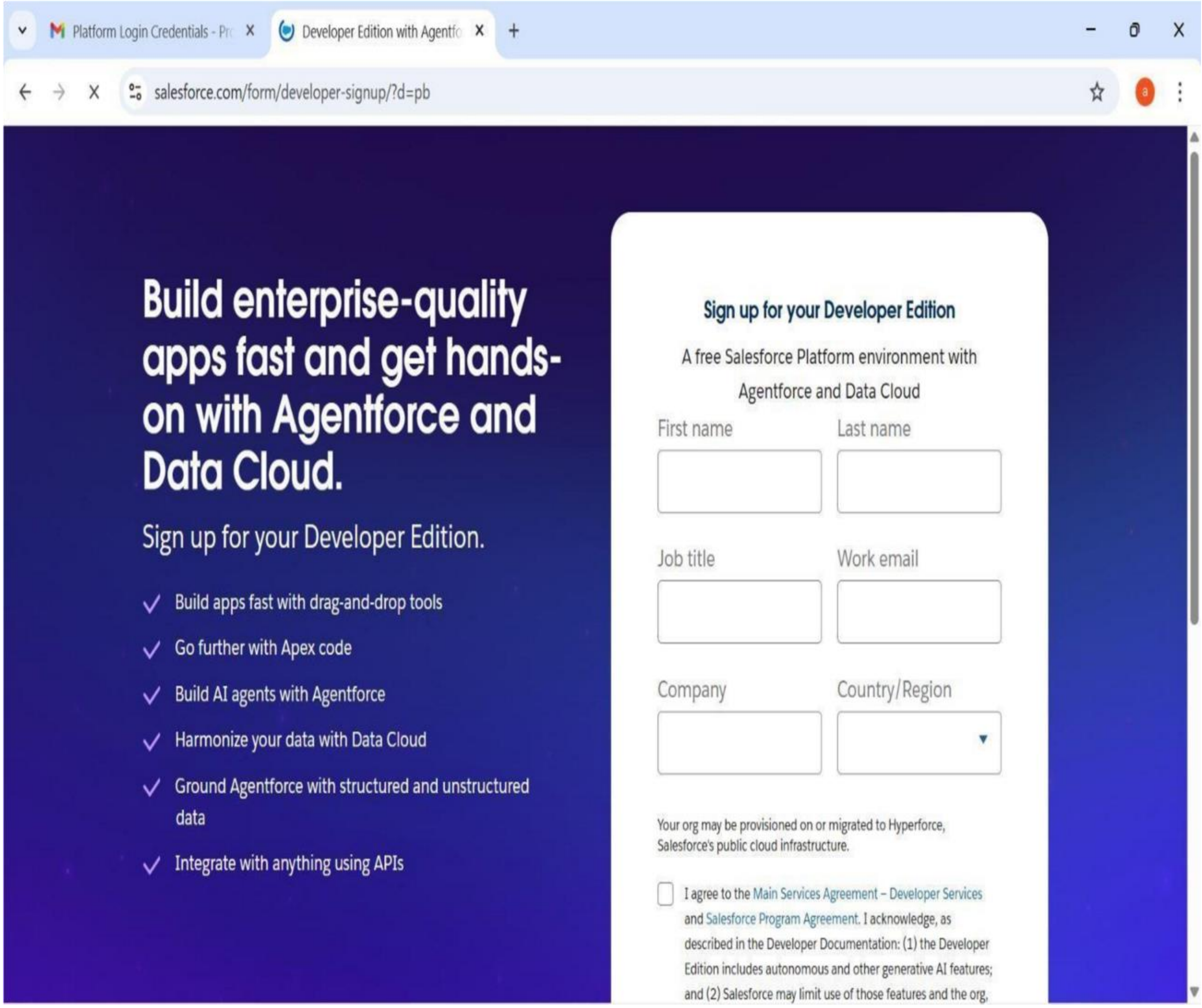
Creating Developer Account:

By using this URL - https://naanmudhalvan.smartinternz.com

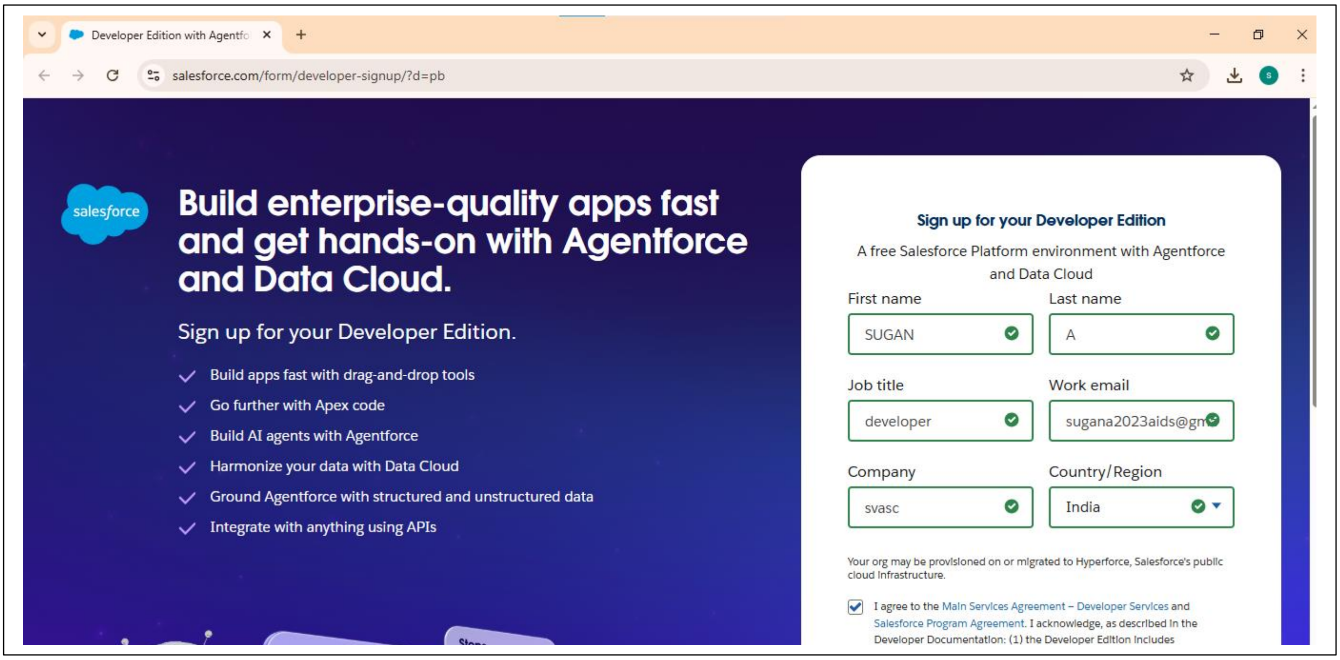
Salesforce

Creating Developer Account

- Sign up for Salesforce Developer Edition to build enterprise apps using Agent force, Data Cloud, and low-code tools

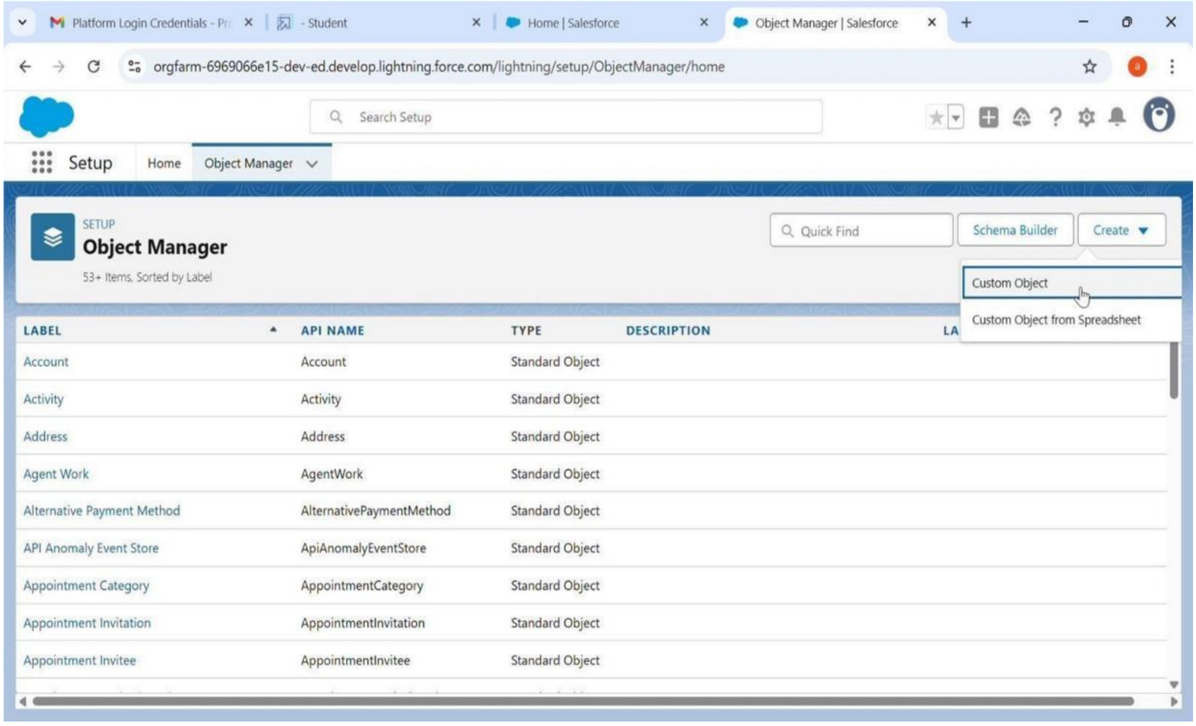


- Completed Salesforce Developer Edition registration to start building apps with Agent force and Data Cloud



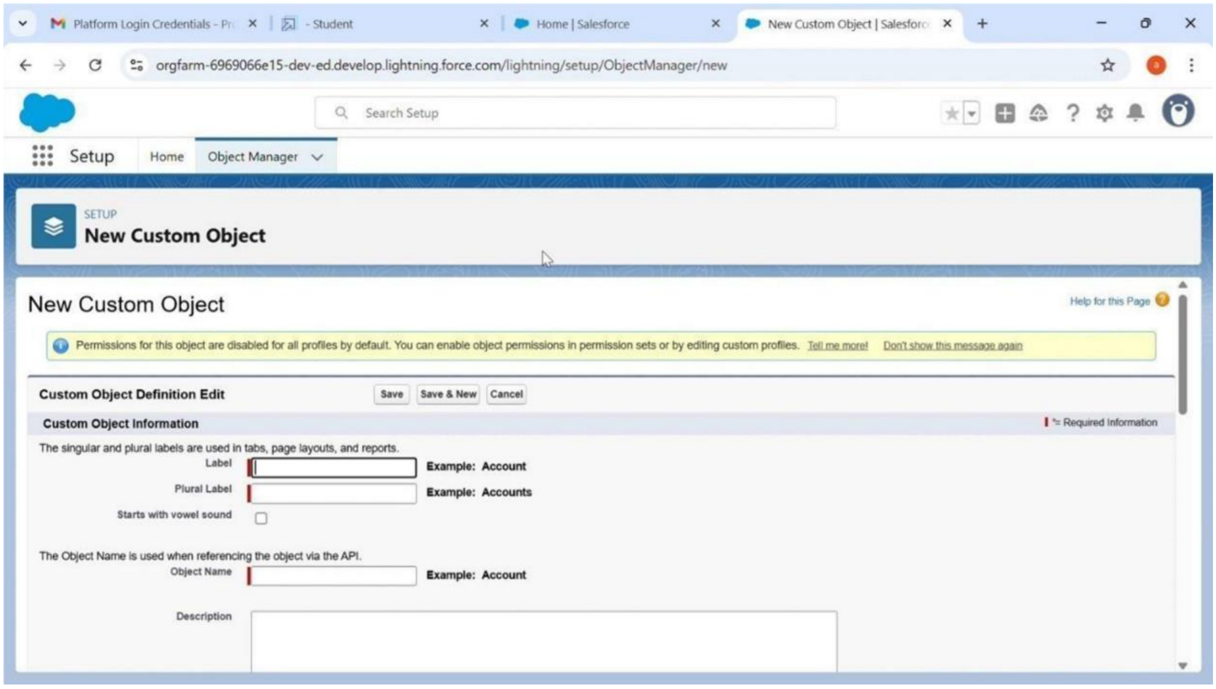
Create Jewel Customer Object

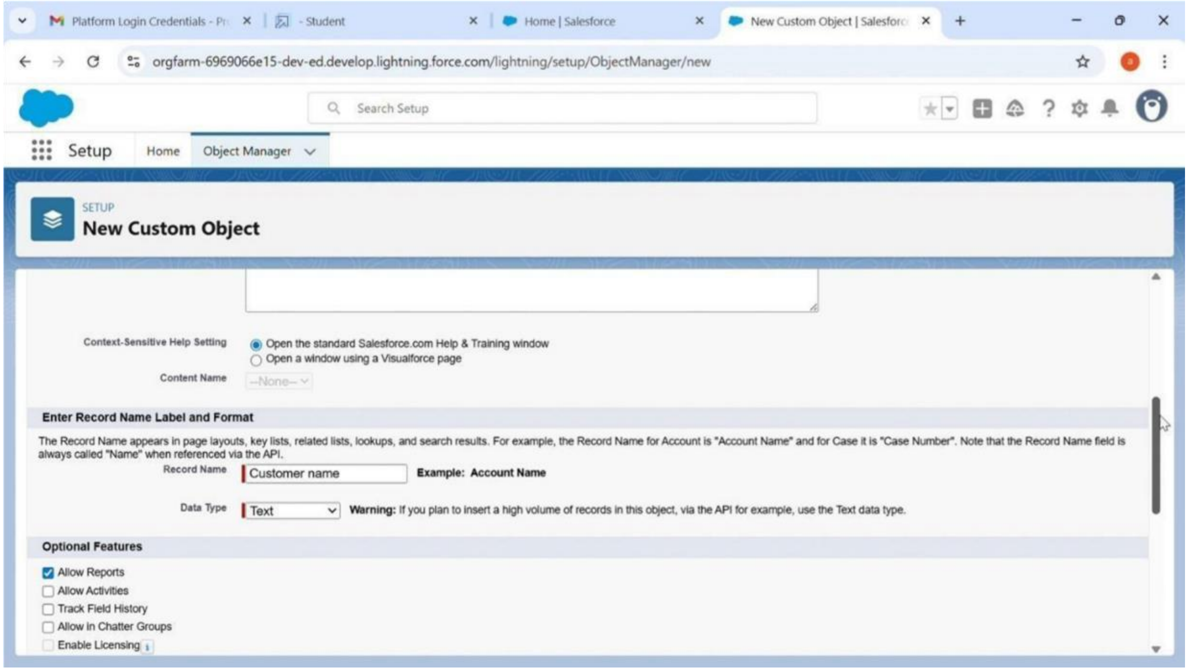
Accessed the Salesforce Object Manager to explore and manage standard objects for CRM customization



Create Item Object

- Create a new custom object by defining its label, API name, and description to tailor your CRM data structure

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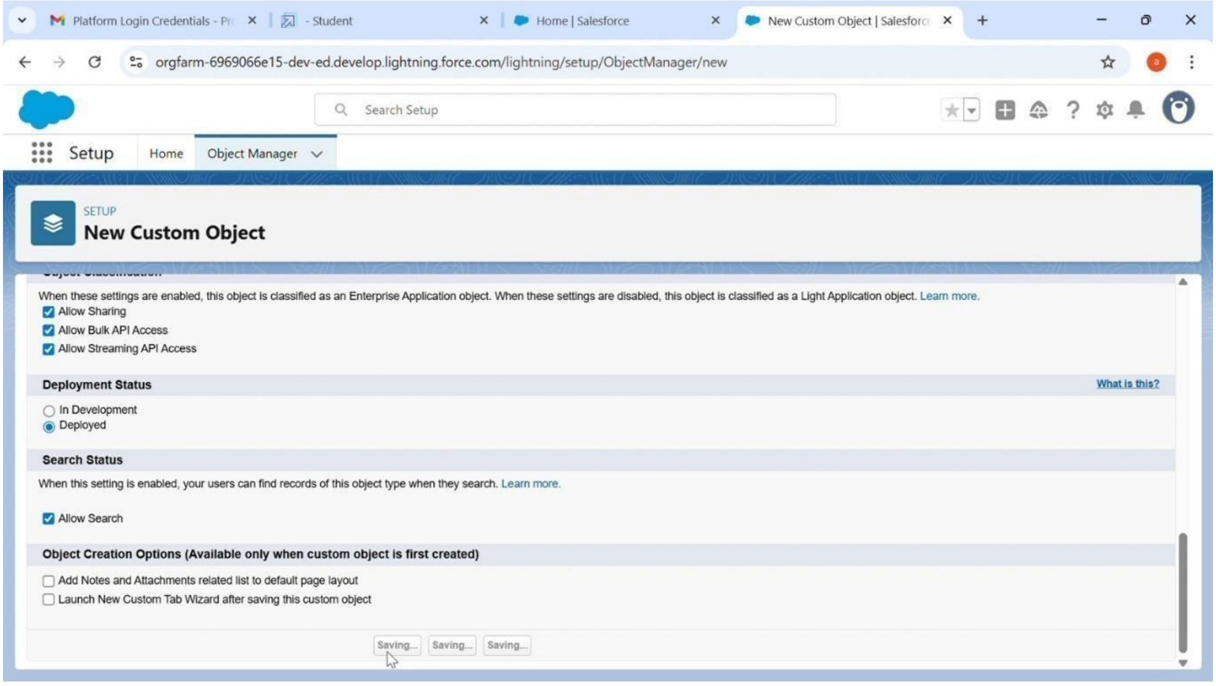
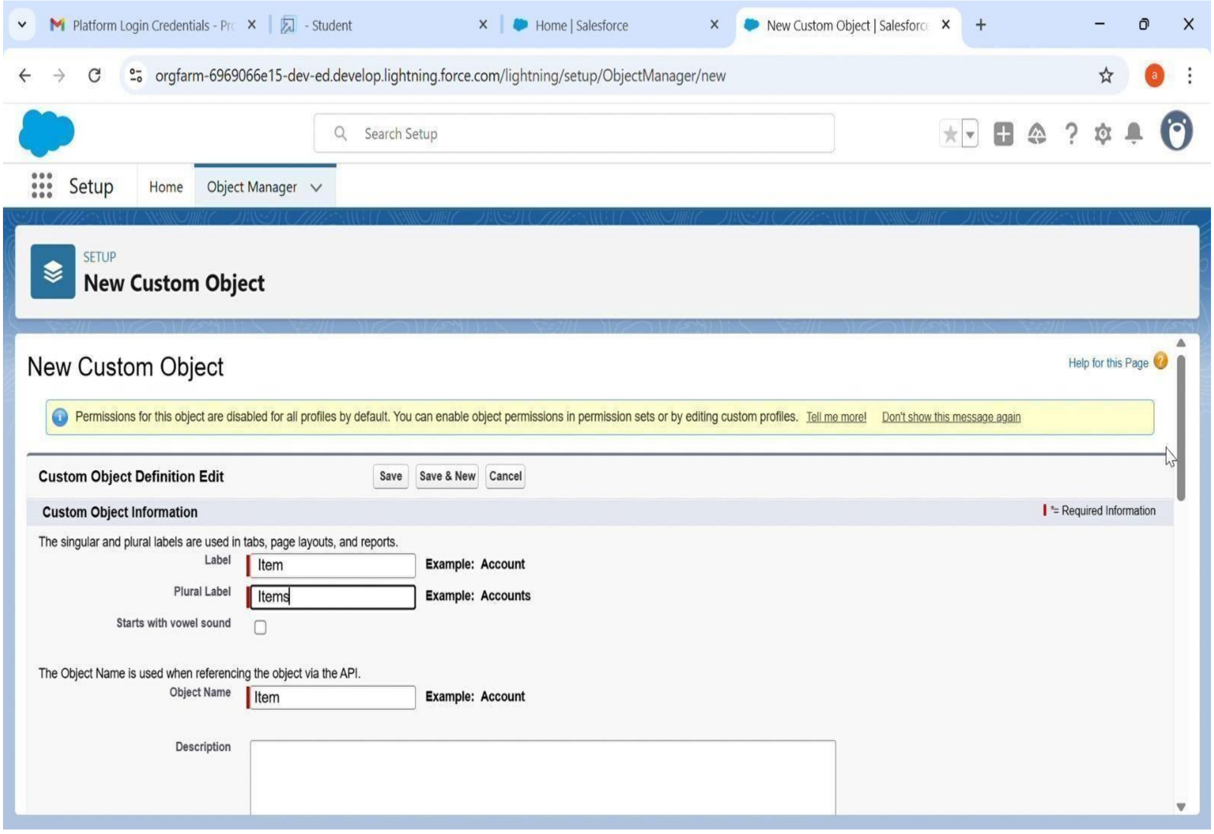
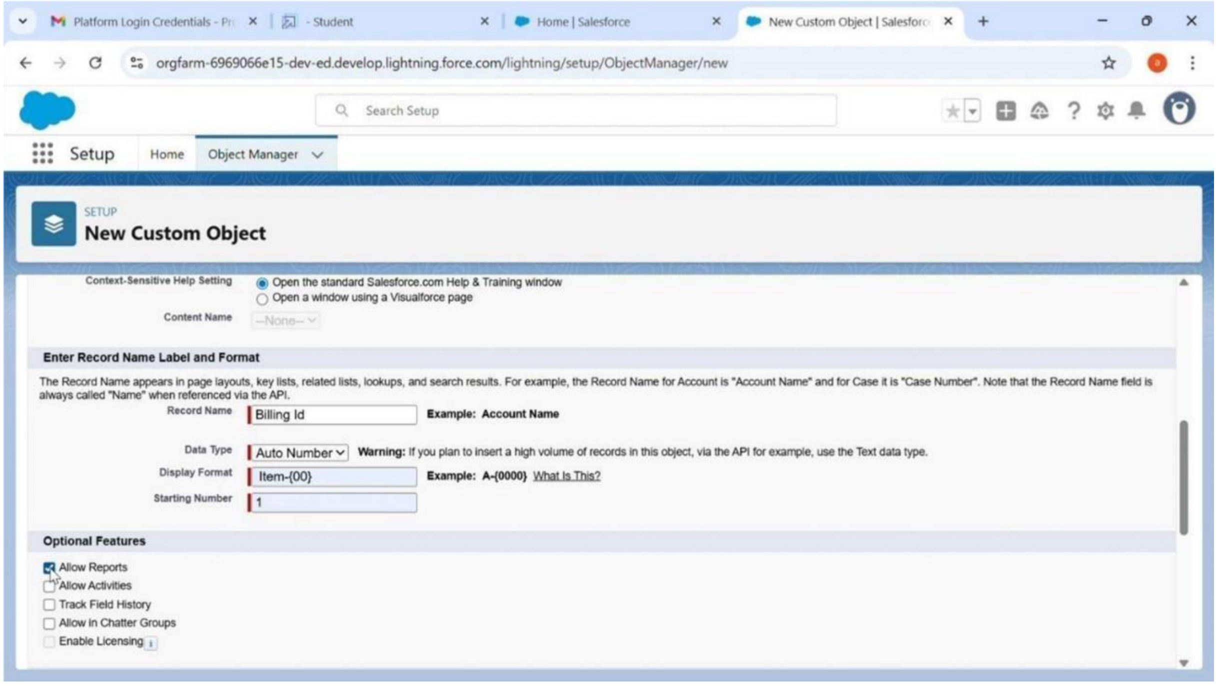
Search Setup
Setup
Home
Object Manager
SETUP
New Custom Object
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page
Content Name
--None--
Enter Record Name Label and Format
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
Record Name
Customer name
Example: Account Name
Data Type
Text
Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.
Optional Features
Allow Reports
Allow Activities
Track Field History
Allow in Chatter Groups
Enable Licensing



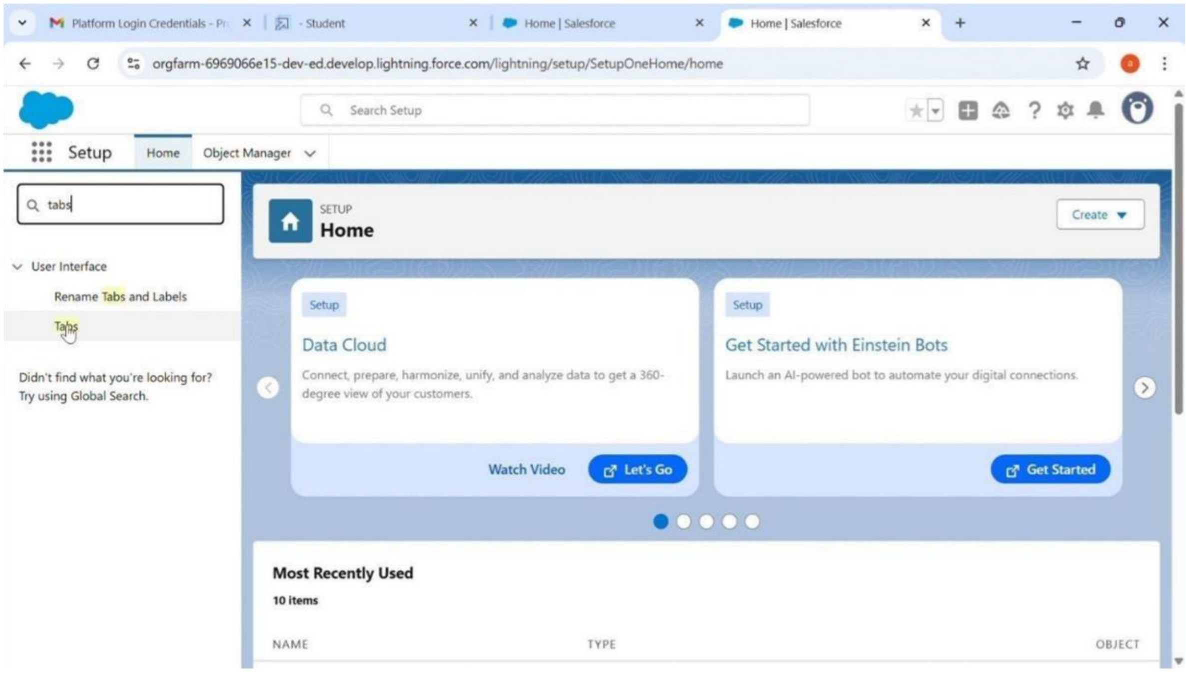


- creating a Salesforce custom object with an auto-generated record name format like "INV-{000}", starting from 1.

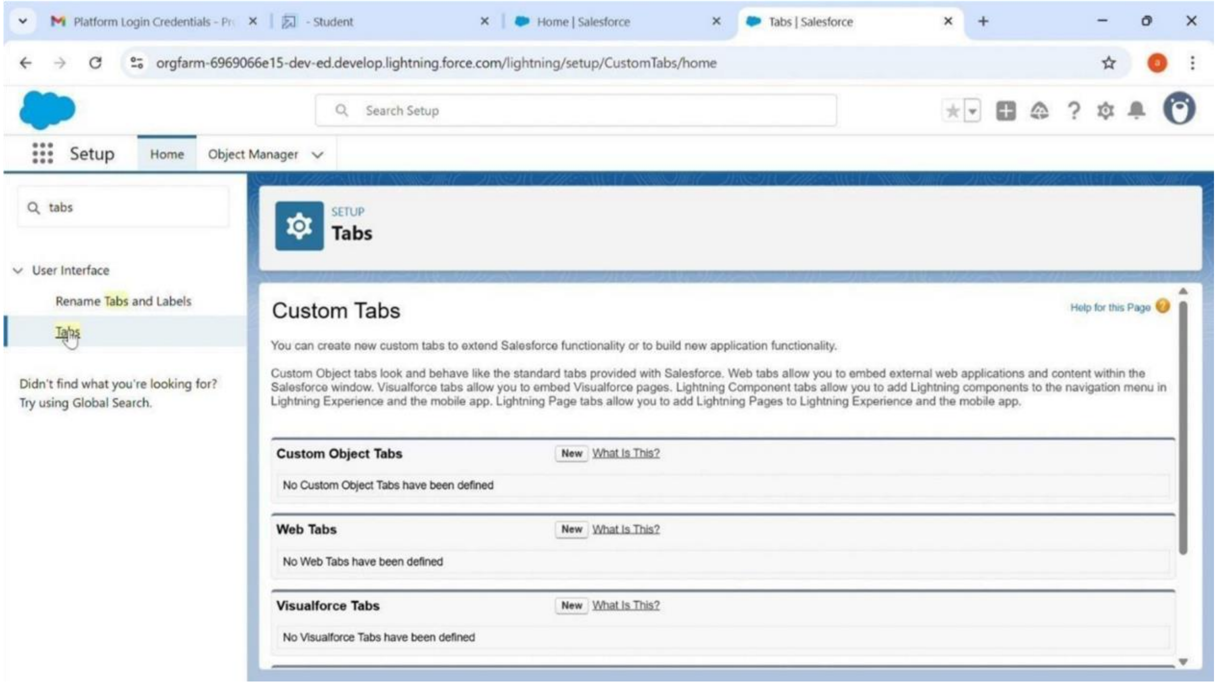


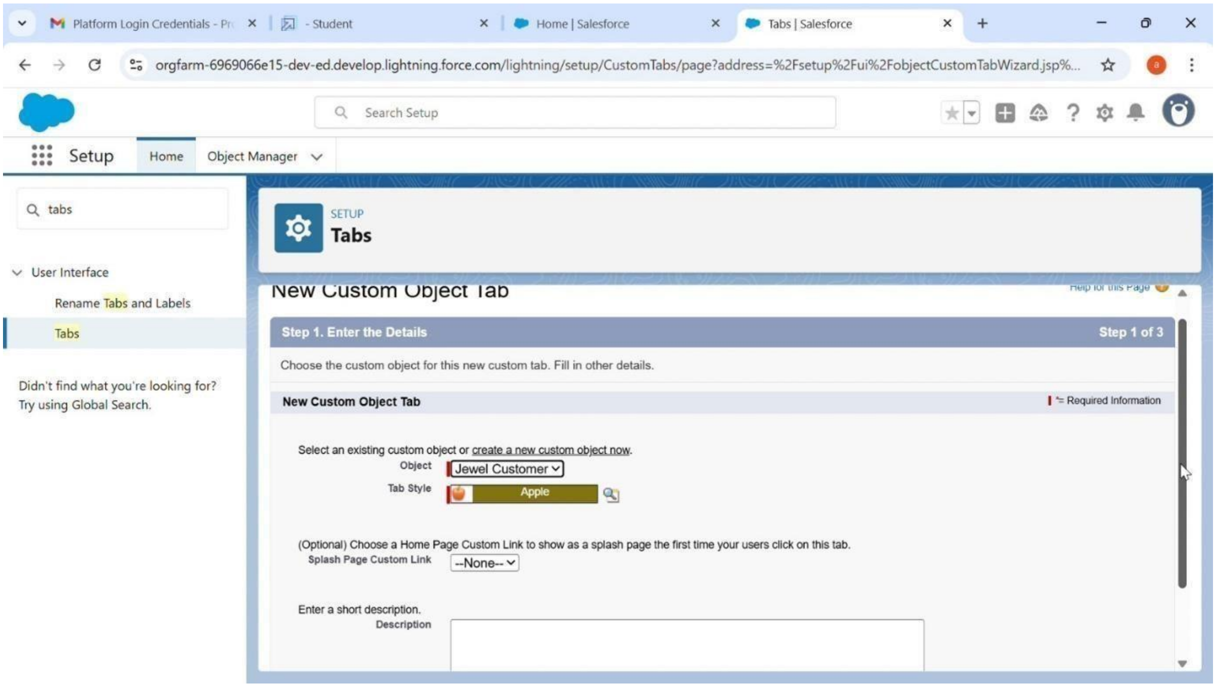
Tabs

Salesforce Setup Home page with quick-start options for Data Cloud and Einstein Bots, and a sidebar search for "label" under User Interface settings.



- the **Custom Tabs** setup section, where you can create new tabs for custom objects, web content, or Visualforce pages—none have been defined yet, and each section offers a "New" button

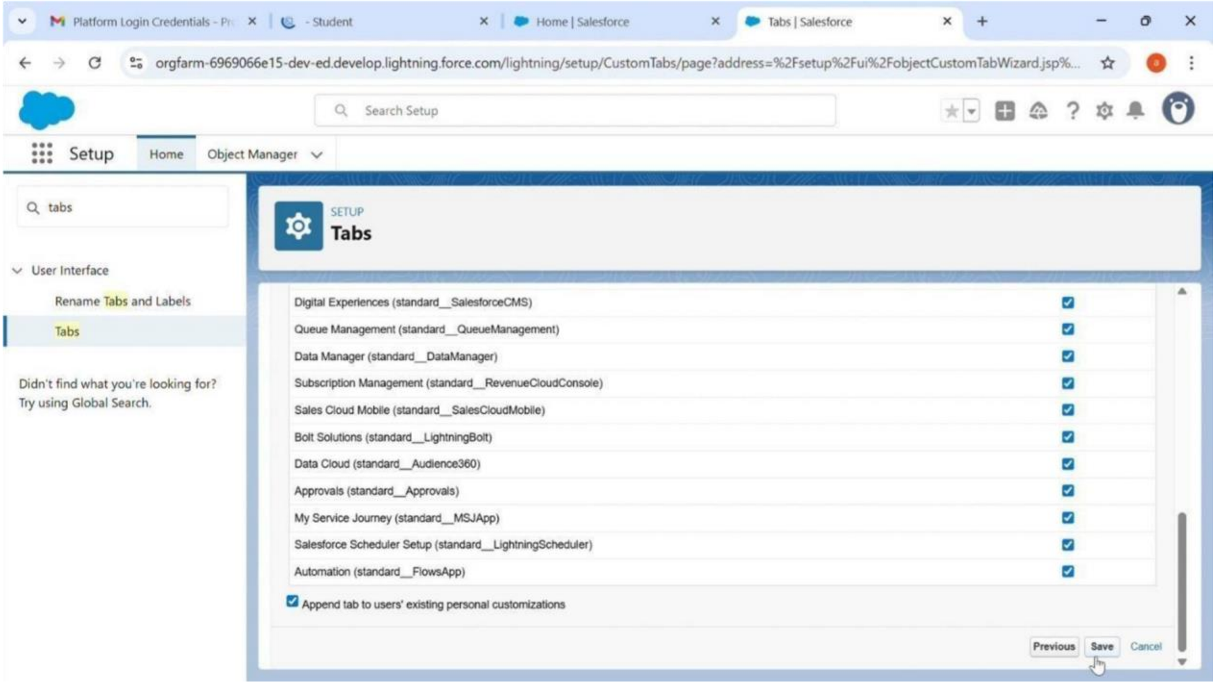




- This Salesforce screen displays a list of **standard tabs** available for customization— such as

Digital Experiences, Data Manager, and

Student Journal tools—with an option enabled to append these tabs to the user's existing personal interface settings.

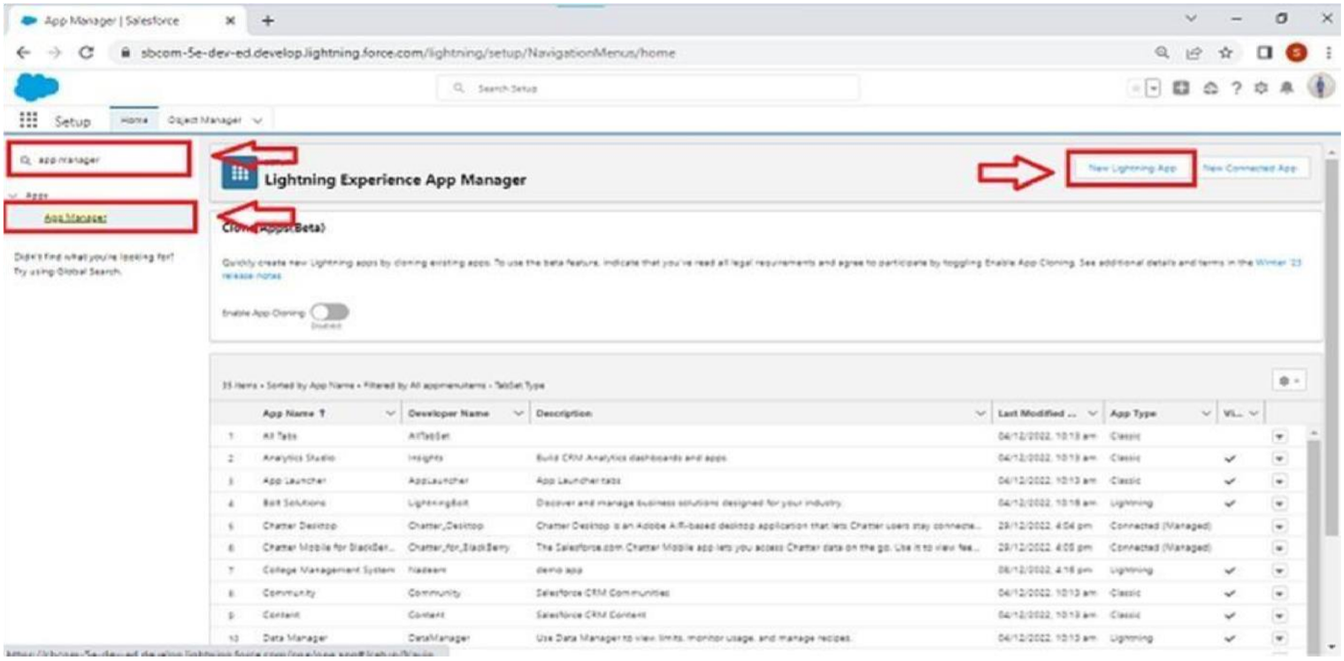


The Lightning App

Create a Lightning App

To create a lightning app page:

1. Go to setup page >> search "app manager" in quick find >> select "app manager" >> 2. click on New lightning App.

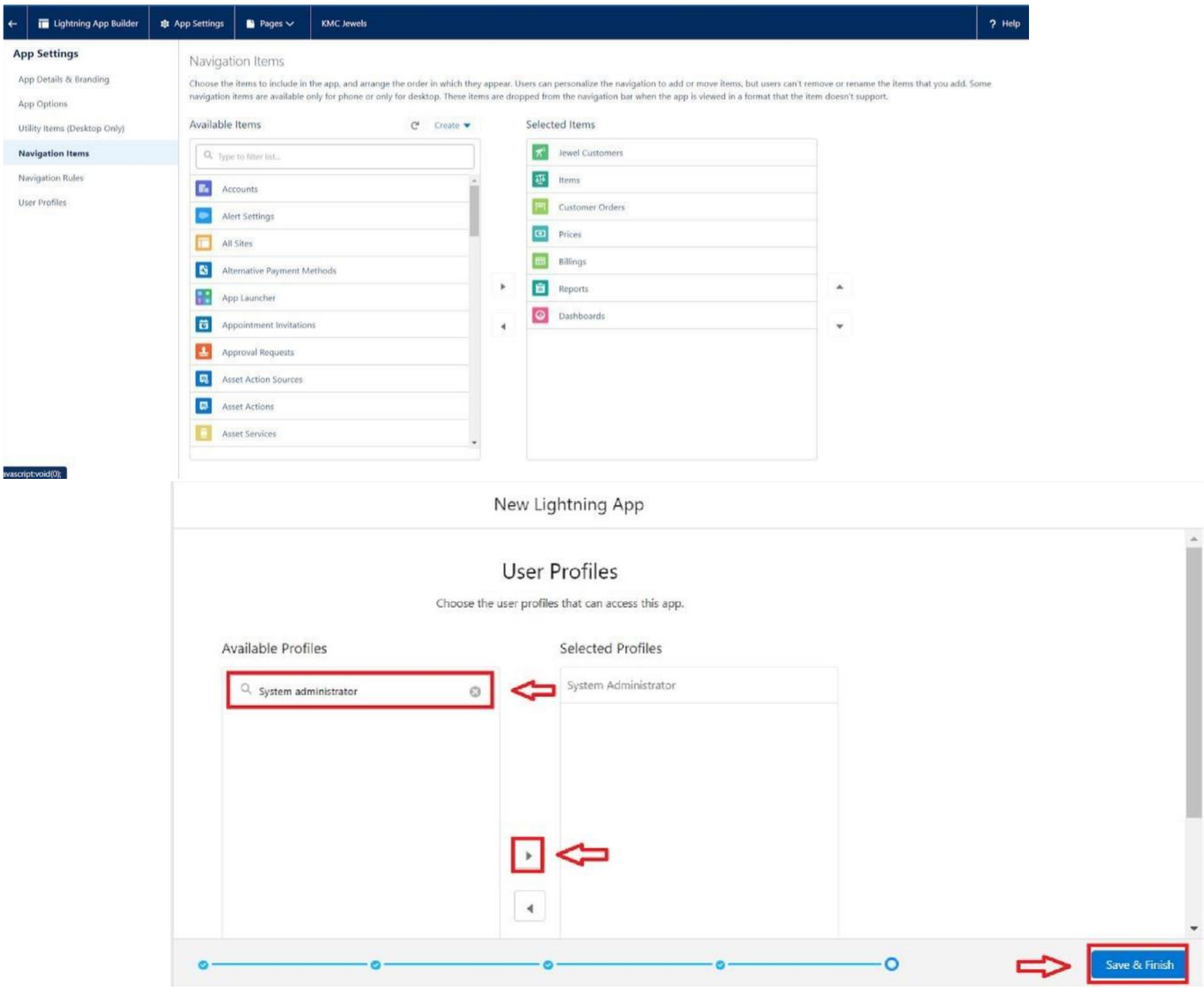


Fill the app name in app details and branding as follow App Name : Jewellery Inventory System.

Developer Name : This will auto populated

Description : Elevate your look with elegance

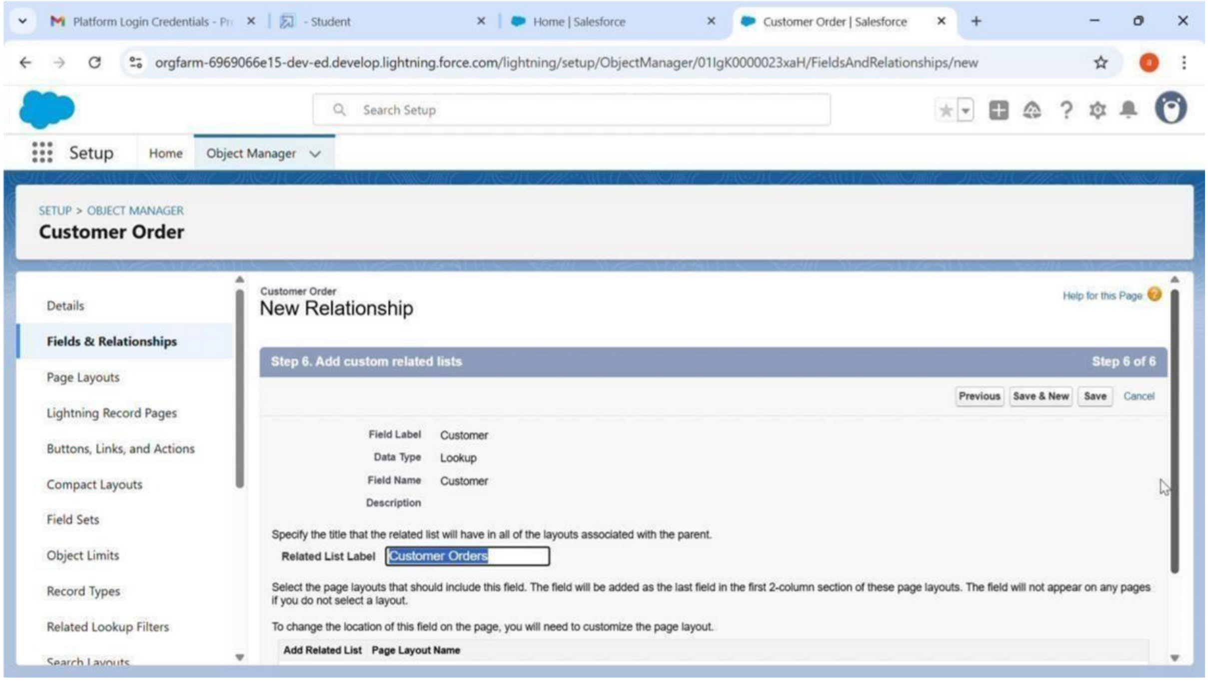
Image : optional (if you want to give any image you can otherwise not mandatory) Primary colour hex value : keep this default Then click Next >> (App option page)Set Navigation Style as Console Navigation >> Next.



Fields

Creating Lookup Relationship

1. Go to the setup page >> click on object manager >> type object name(Customer Order) in the quick find bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select "Lookup relationship" as data type and click Next.
4. Select the related object " Jewel Customer ".
5. Give Field Label as "Customer" and click Next.
6. Next >> Next >> Save.


Platform Login Credentials - Pr
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Customer Order | Salesforce
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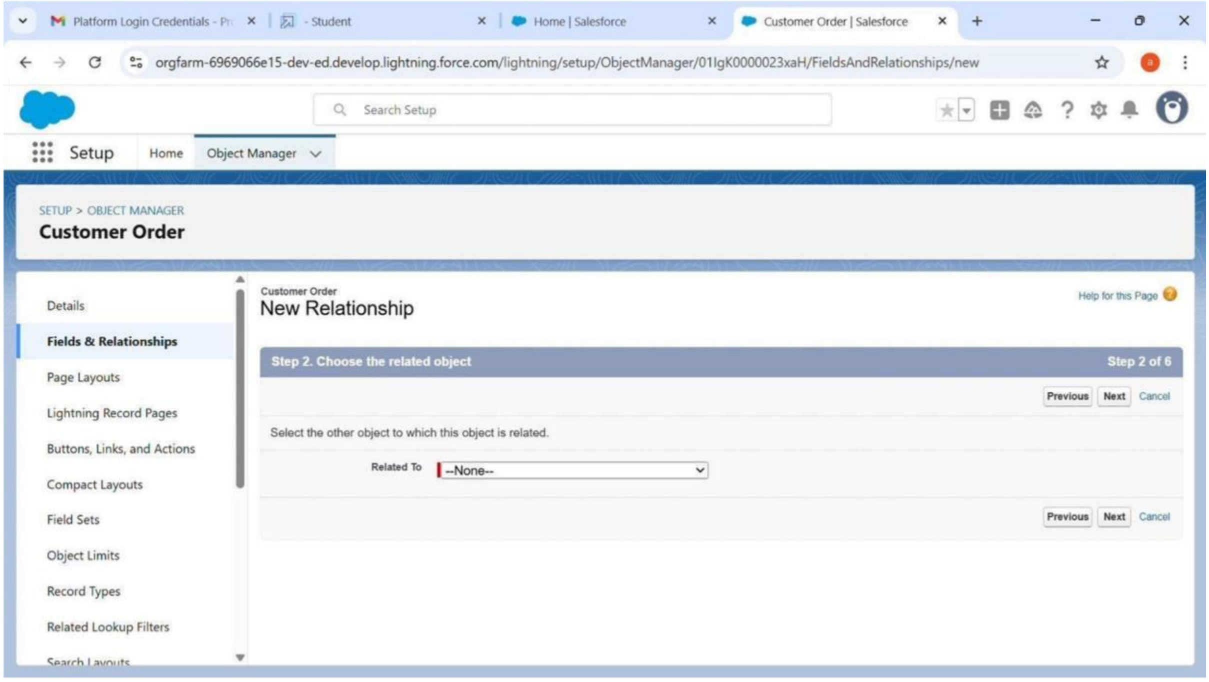
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Customer Order
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Customer Order
New Relationship
Help for this Page
Step 6. Add custom related lists
Step 6 of 6
Previous
Save & New
Save
Cancel
Field Label Customer
Data Type Lookup
Field Name Customer
Description
Specify the title that the related list will have in all of the layouts associated with the parent.
Related List Label Customer Orders
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 Related List Page Layout Name

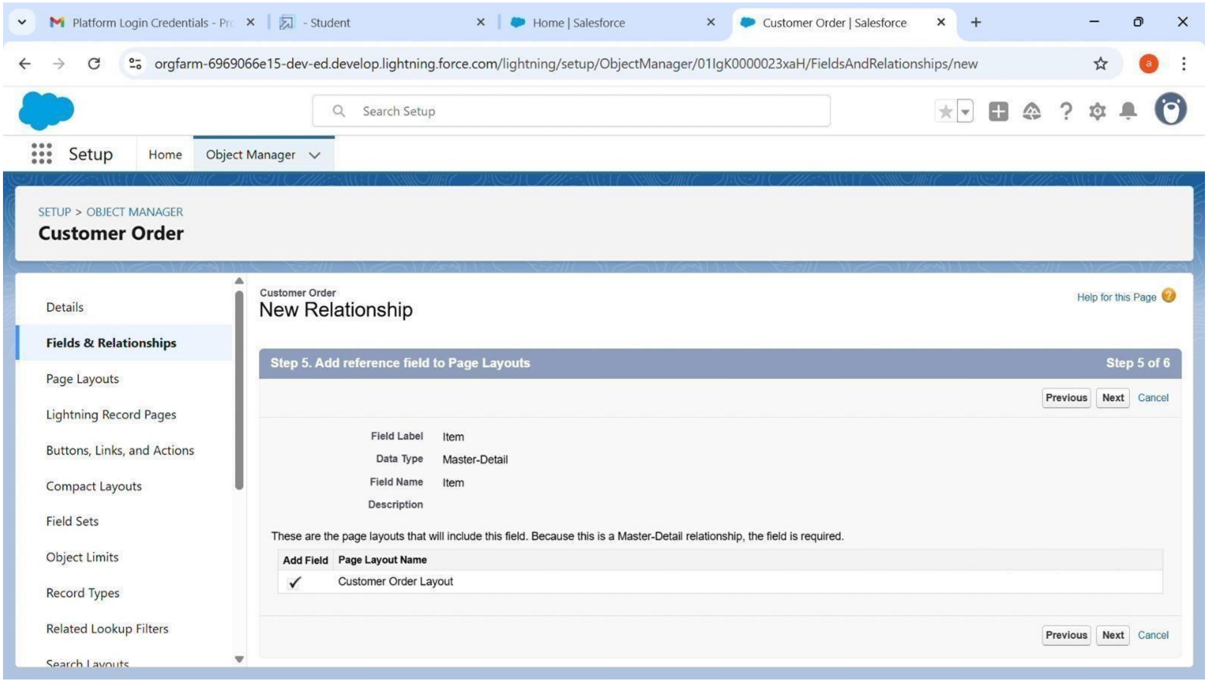
Creating
a Master-Detail Relationship

To Create a Master-Detail relationship :

1. Go to the setup page >> click on object manager >> type object name(Customer Order) in the quick find bar >> click on the object.
2. Click on fields & relationships >> click on New.
3. Select "Master-Detail relationship" as data type and click Next.
4. Select the related object " Item".
5. Give Field Label as "Item" and click Next.
6. Next >> Next >> Save.

Creating





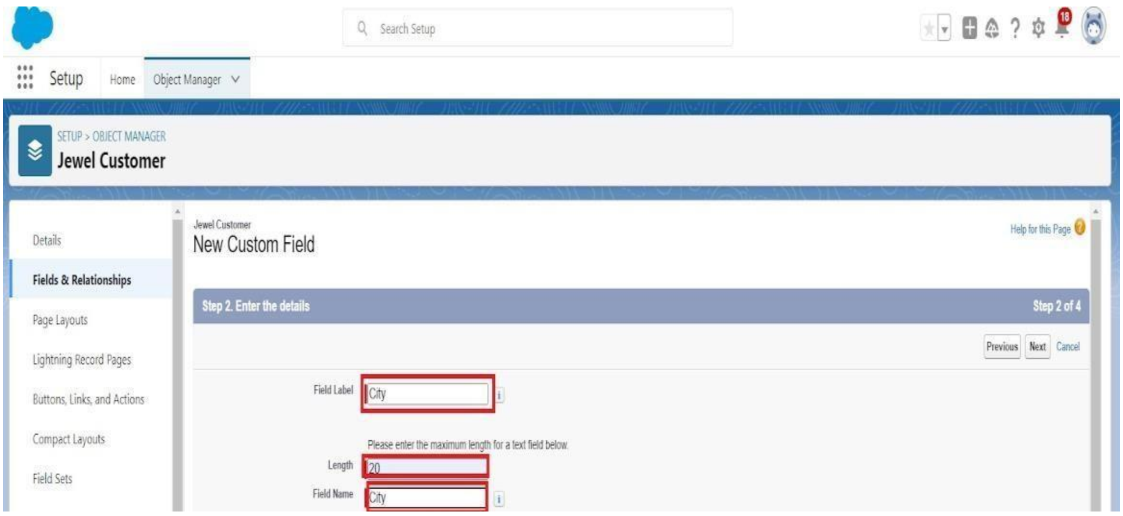
Text Field in Jewel Customer Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object
2. Now click on “Fields & Relationships” >> New
3. Select Data type as “Text”.
4. Click on Next
5. Fill the above as following:
6. Field Label: City

Creating

7. Length : 20
8. Field Name : gets auto generated
9. Click on Next >> Next >> Save and new.



Creating the Phone field in object Jewel Customer

To create fields in an object:

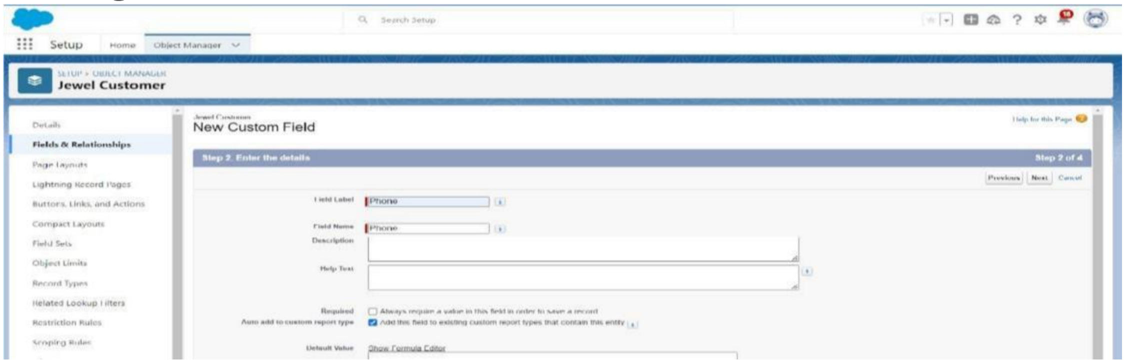
1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar >> click on the object. 2. Now click on "Fields & Relationships" >> New
3. Select Data type as "Phone" and click Next.
4. Given the Field Label as " Phone".
5. Field Name will be auto populated, and click on Next >> Next >> Save & new.

the number field in Item object

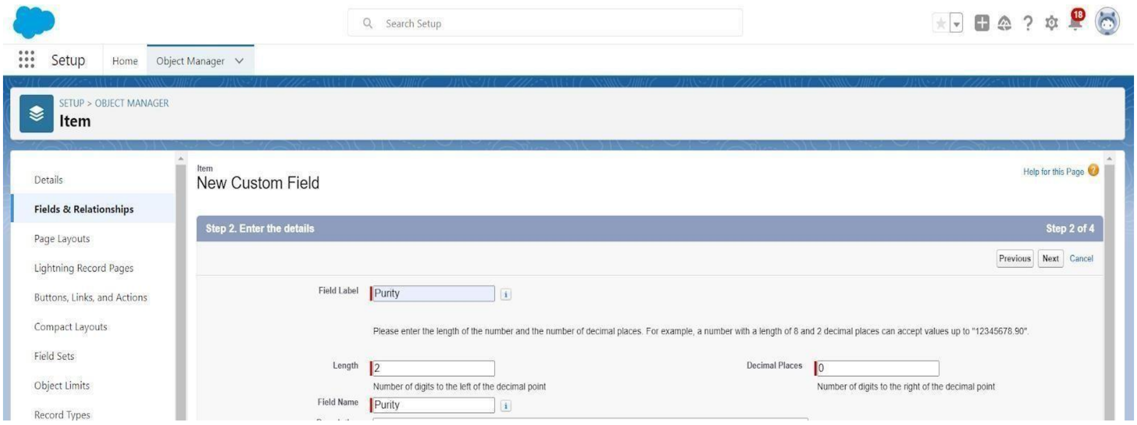
To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as "Number" and click Next.
4. Given the Field Label as " Purity" and length as " 2 ".

Creating



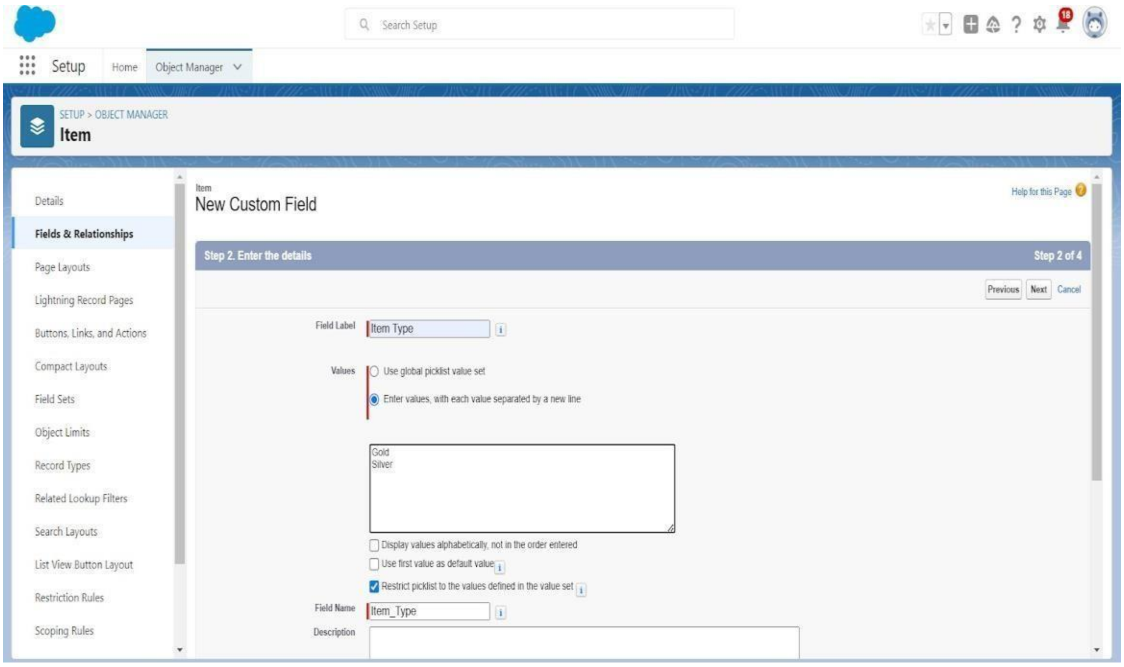
5. Field Name will be auto populated, and click on Next >> Next >> Save.



Creating Picklist Field in Item Object

To create fields in an object:

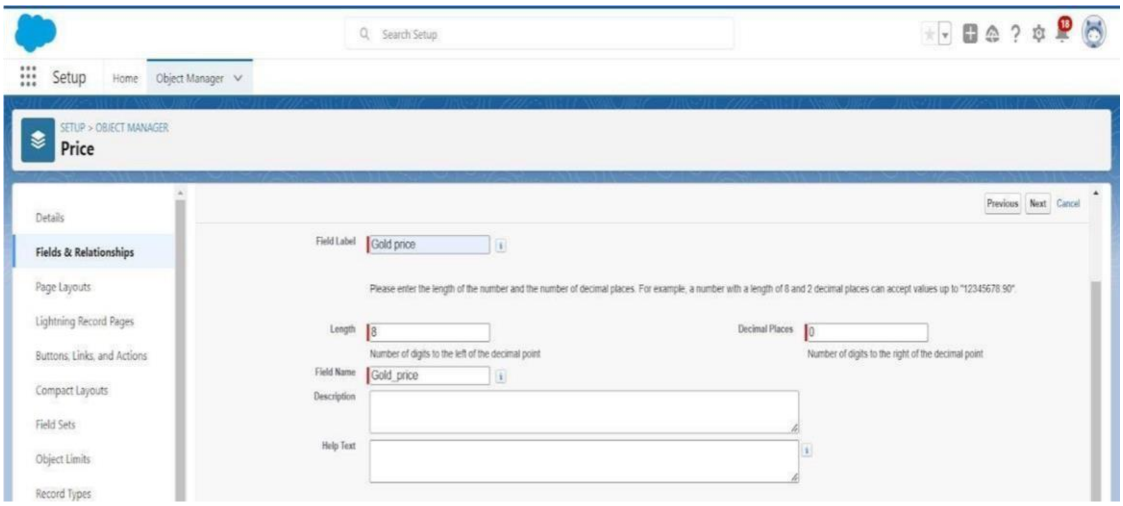
1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar>> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select Data type as “Picklist” and click Next.
4. Enter Field Label as “Item Type”.
5. In values select “Enter values(Gold,Silver), with each value separated by a new line" and enter values as shown below.
6. Click Next? Next ? Next ? Save .



Creating Currency Field in Price Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Price) in quick find bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select Data type as "Currency" and click Next.
4. Enter Field Label as "Gold Price" and length as " 8"and decimal 0.Field name will be auto generated.
5. Click Next >> Next >> Next >> Save .

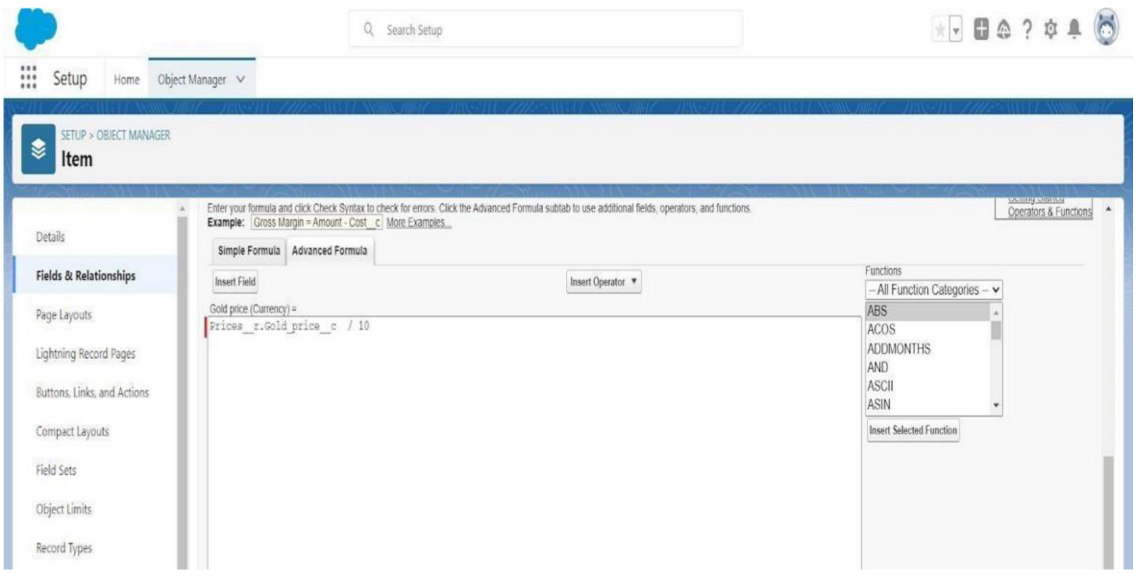


Creating Formula Field(Cross Object) in Item Object

To create fields in an object:

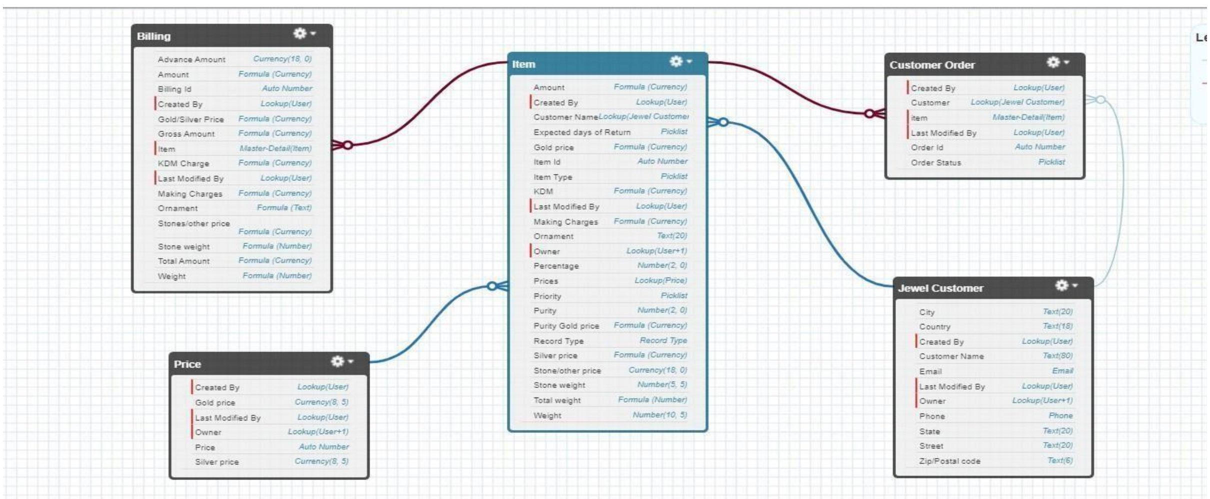
(Note:Create a Lookup Relationship in Item Object to Price Object with Field Name:Prices)

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select Data type as “Formula” and click Next.
4. Give Field Label and Field Name as “Gold Price” and select formula return type as “Currency” and click next.
5. Under Advanced Formula write down the formula :Prices_r.Gold_price_c / 10.
6. click “Check Syntax” and Next >> Next >> Save & New.



Schema Builder

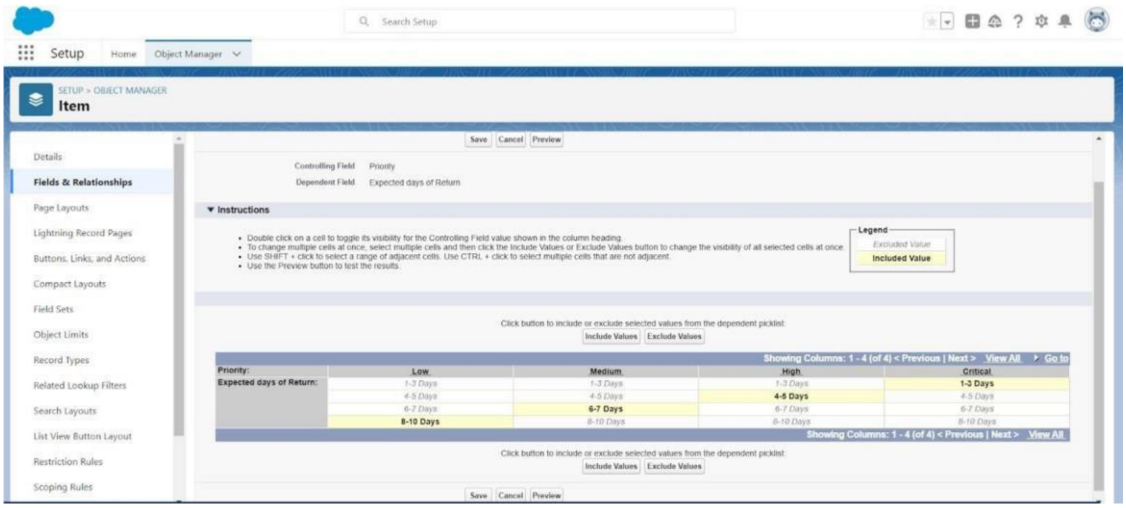
Schema Builder is a powerful tool within Salesforce that allows you to visualise, explore, and design the relationships between objects in your Salesforce organisation. It provides a graphical representation of the data model, making it easier to understand the structure and connections between different objects.



Creating the Field Dependencies

Use case:
Field Dependencies are used to create relationships between fields within an object. They allow you to control the visibility and availability of fields based on the values selected in other fields.

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar >> click on the object.
2. Click on Fields & Relationships and click on the Priority field.
3. Search for Field Dependencies and click on New.
4. Select Controlling Field as "Priority" and Depending field as "Expected Days of Return" >> Continue.
5. Select Controlling Field as "Priority" and Depending field as "Expected Days of Return" >> Continue.

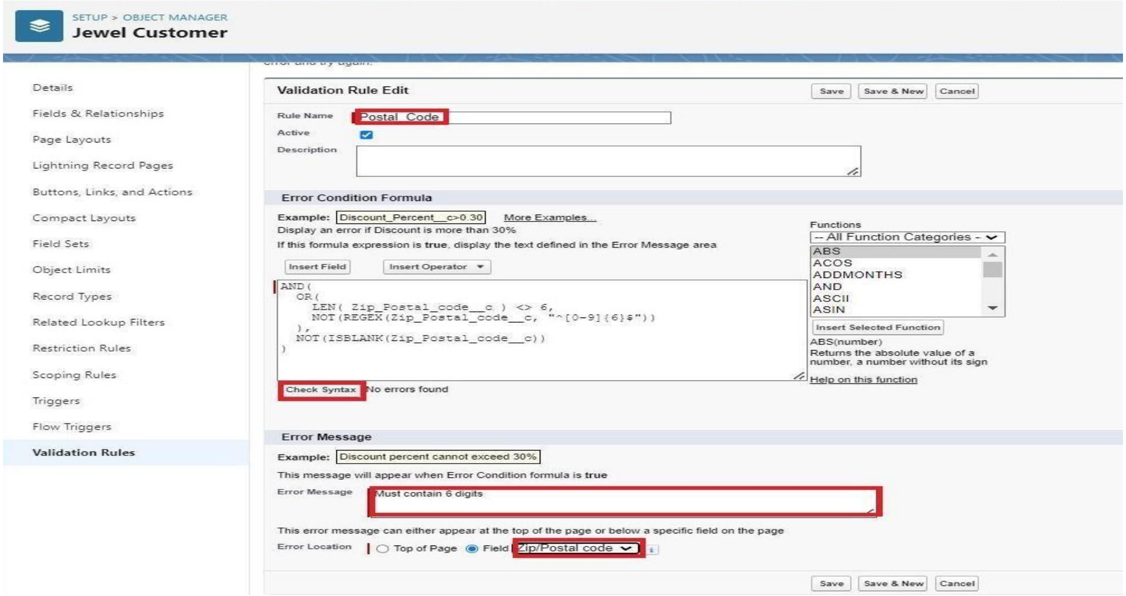


Creating the validation rule

1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar>> click on the object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as "Postal Code ".
4. Insert the Error Condition Formula as : -

```
AND(
  OR(
    LEN( Zip_Postal_code_c ) <> 6, NOT(REGEX(Zip_Postal_code_c, "^[0- 9]{6}$"))),
    NOT(ISBLANK(Zip_Postal_code_c))
  )
)
```

5. Enter the Error Message as "Must contain 6 digits", select the Error location as Field and select the field as "Zip/Postal code", and click Save.

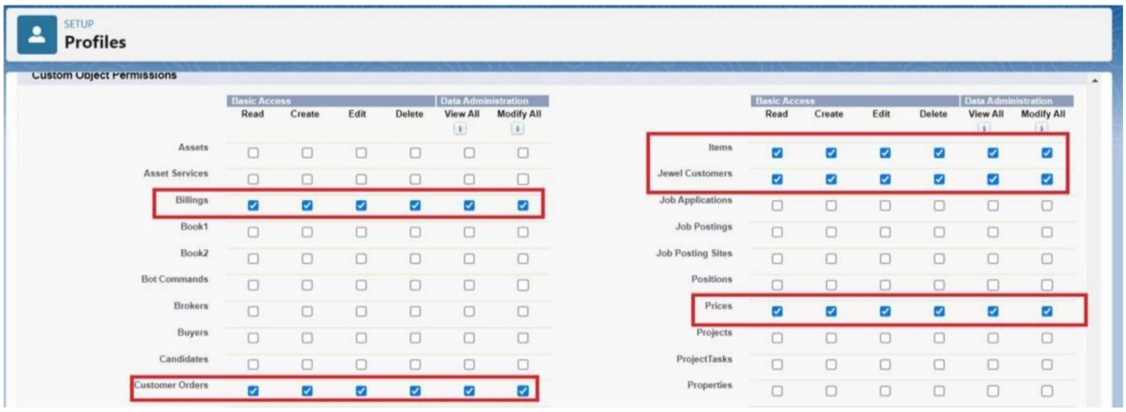


Profile

Gold Smith Profile

To create a new profile:

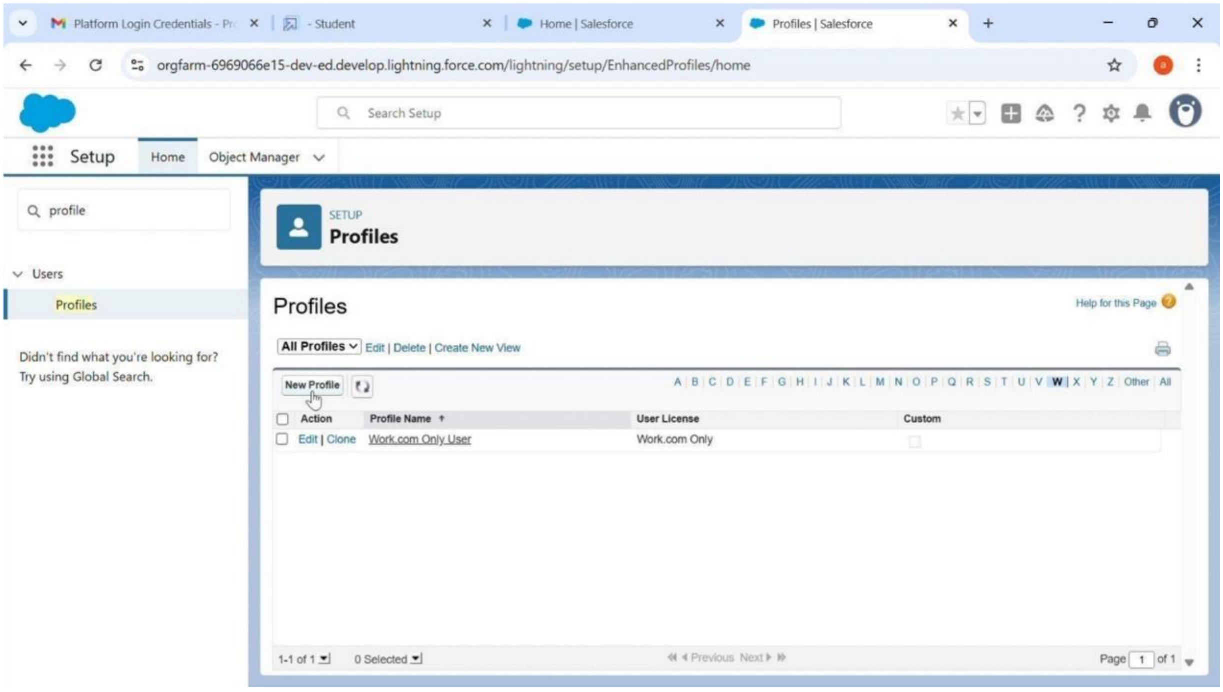
1. Go to setup >> type profiles in quick find box >>click on profiles ? clone the desired profile (System Administrator) >> enter profile name (Gold Smith) >> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Jewel Customer,Item,Customer Order,Prices,Billings
4. Scroll down and Click on Save.



Worker Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Salesforce Platform User) >> enter profile name () >> Save.

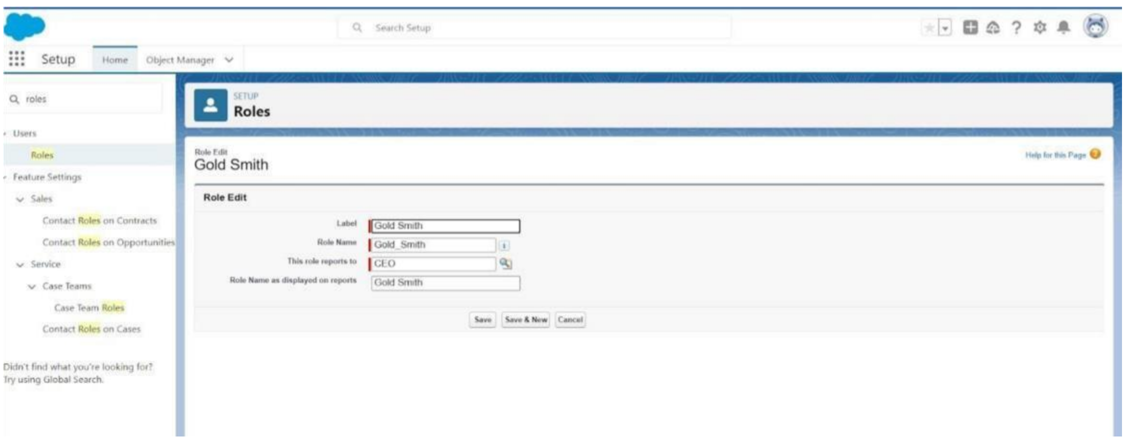
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Items,Price and Customer Order objects.
4. Scroll down and Click on Save.



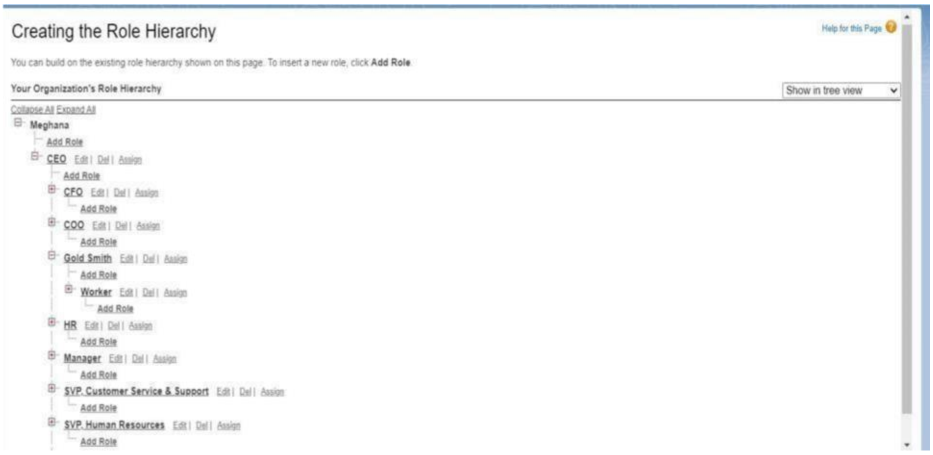
Roles

Creating Gold Smith Role

1. From setup ,Go to quick find >> Search for Roles >> click on set up roles.
2. Click on Expand All and click on add role under whom this role works.
3. Give Label as “Gold Smith” and Role name gets auto populated. Check to whom this role (Gold Smith) reports. Then click on Save.



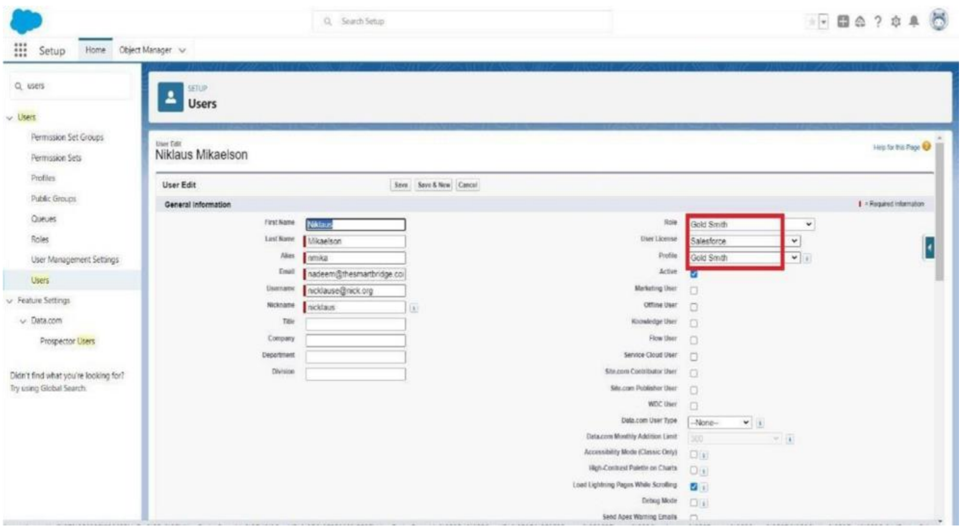
Create one more role as Worker which reports to Gold Smith.



Users

Create User

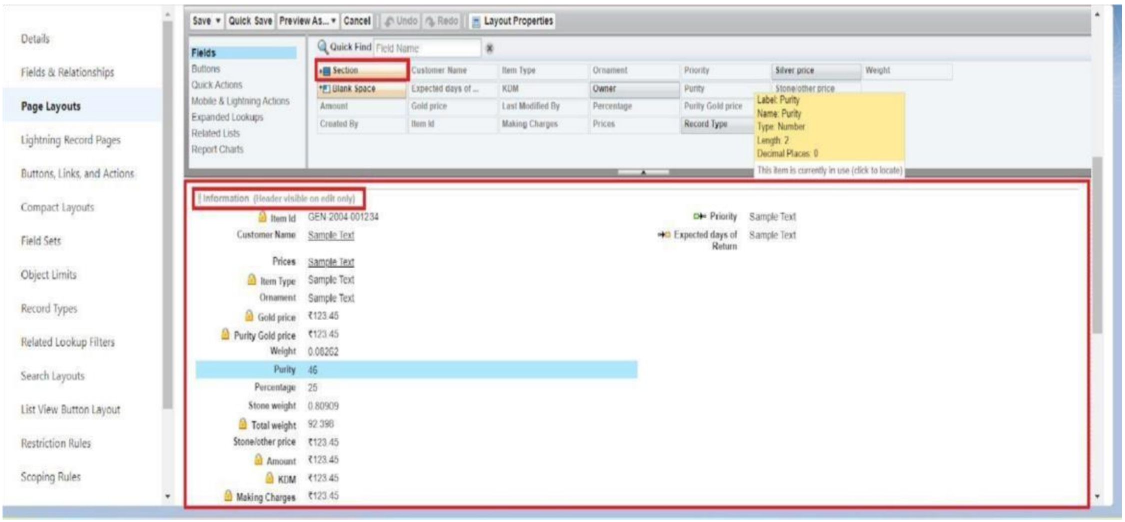
1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
1. First Name : Niklaus
2. Last Name : Mikaelson
3. Alias : Give a Alias Name
4. Email id : Give your Personal Email id
5. Username : Username should be in this form: text@text.text
6. Nick Name : Give a Nickname
7. Role : Gold Smith
8. User licence : Salesforce 9. Profiles : Gold Smith
10. Save.



Page layouts

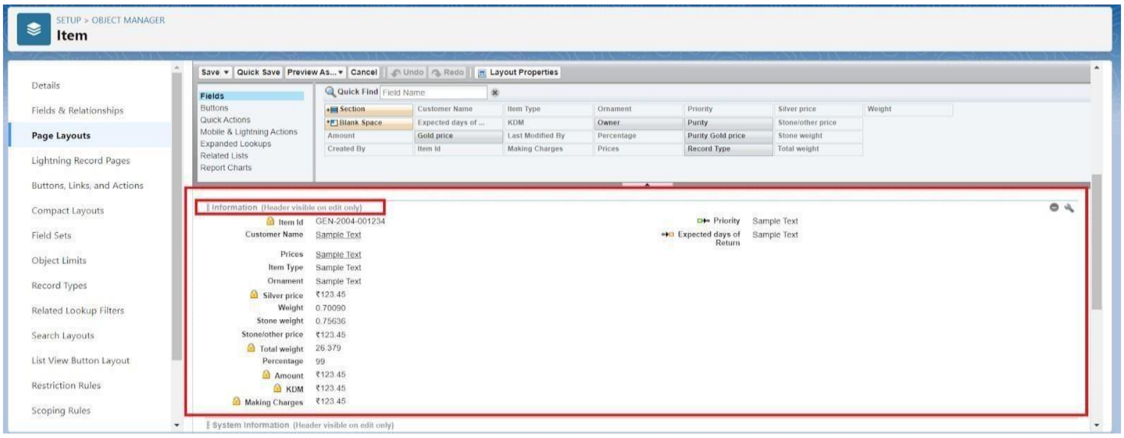
To Create a Gold Page layout

1. Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.
2. Click on Page layout >> Click on New.
3. Give Page layout Name as "Page Layout for Gold" and click on Save and New.
4. Arrange the field as shown in the Information Section ,remove fields which are related to Silver and click Ok.
5. Click Save.
6. Make sure your page layout looks like the picture above.



To Create a Silver Page layout

1. Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.
2. Click on Page layout >> Click on New.
3. Give Page layout Name as "Page Layout for Silver" and click on Save.
4. Arrange the field as shown in the Information Section ,remove fields which are related to Gold and click Ok.



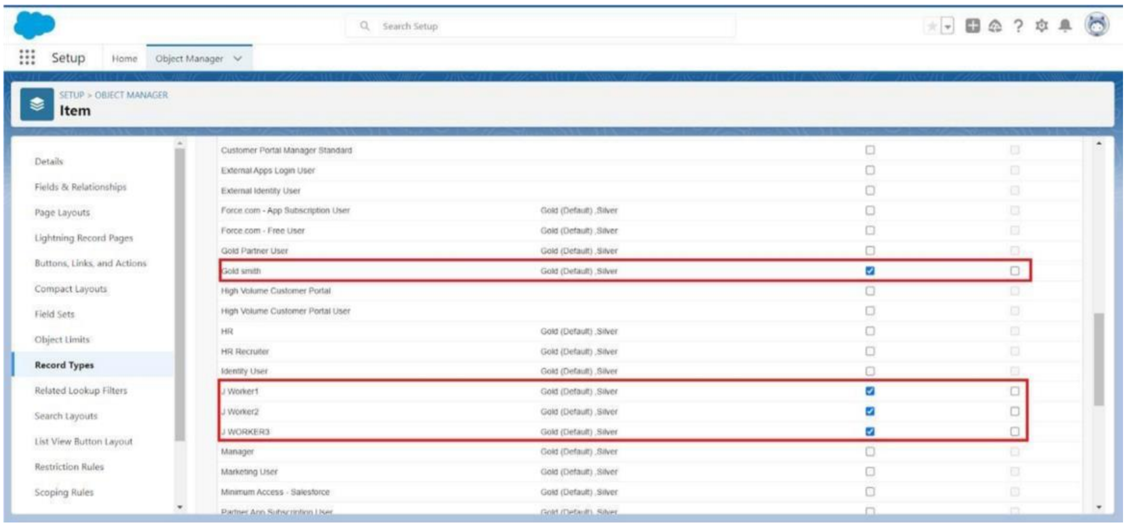
Record Types

To create a Record Type

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
2. Click on the Record Types >> click New.
3. Select Existing Record as “Master”,Record type Label as “Gold”,Description as “Gold items information” 4.

Uncheck for “Make Available”.

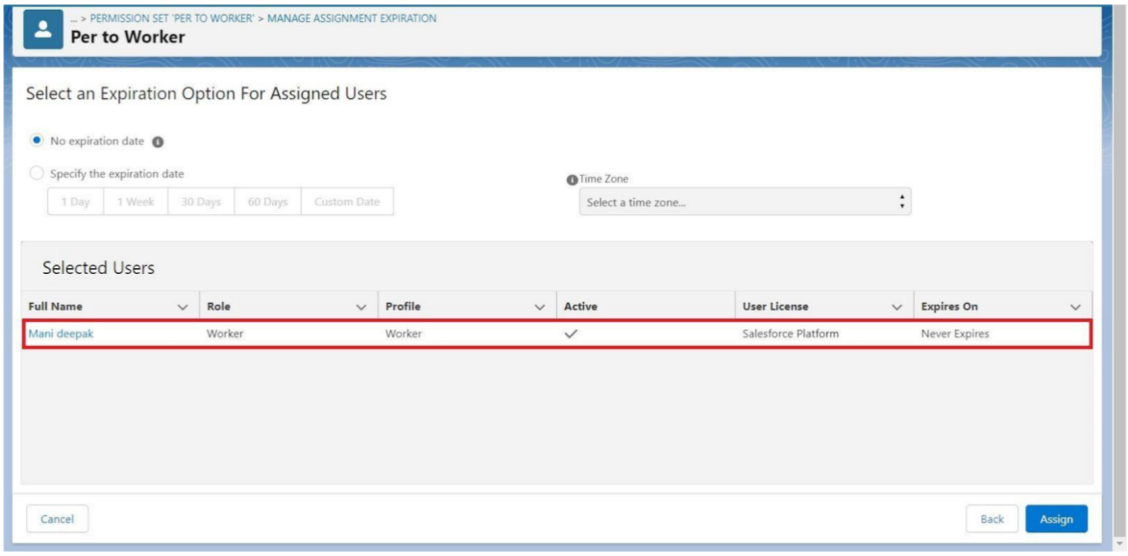
5. Scroll down and check for the Gold Smith,Worker JW & System Administrator profile and click on Next.
6. Select “Apply a different layout for each profile”, and change page layout to “Page Layout for Gold“for Gold Smith,Worker and System Administrator ? save & new.



Permission sets

Creating permission set

1. Go to setup >> type “permission sets” in quick search >> select permission sets >> New.
2. Enter the label name as “Per to Worker”, API will be auto populated ? Save.
3. Under Apps Select object settings.
4. Click on Items object ? click on Edit ? under Item:Record Type Assignments,enable Gold,Silver ? Object permission check for read ,edit and create.
5. Click on Save.
6. After saving the permission click on the Manage assignment
7. Now click on the Add Assignment.
8. Now select the users which you have created in user milestone, using Worker profile and click on Next ? Assign? Done.



Trigger

Create a Trigger Handler class

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:

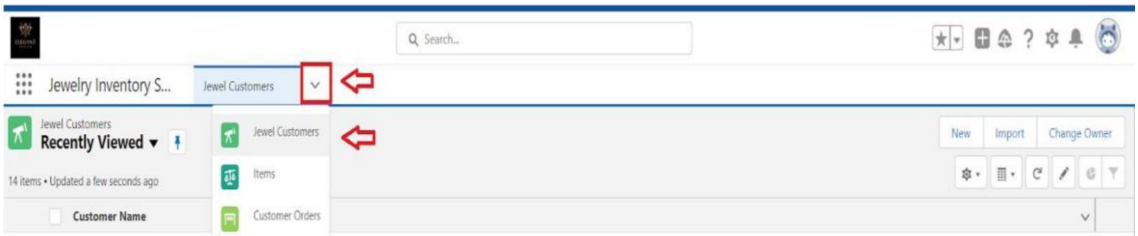
```
trigger UpdatePaidAmountTrigger on Billing_c (before insert, before update)
   { if (Trigger.isInsert) {
```

```
        UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);
    } else if (Trigger.isUpdate) {
      UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap, Trigger.new);
    }
}
```

User Adoption

Create a Record (Jewel Customer)

1. Click on App Launcher on the left side of the screen.
2. Search Jewelry Inventory System & click on it.
3. Click on Drop Down and Click on the Jewel Customer tab.
4. Click New.
5. Fill the Details and click on Save.



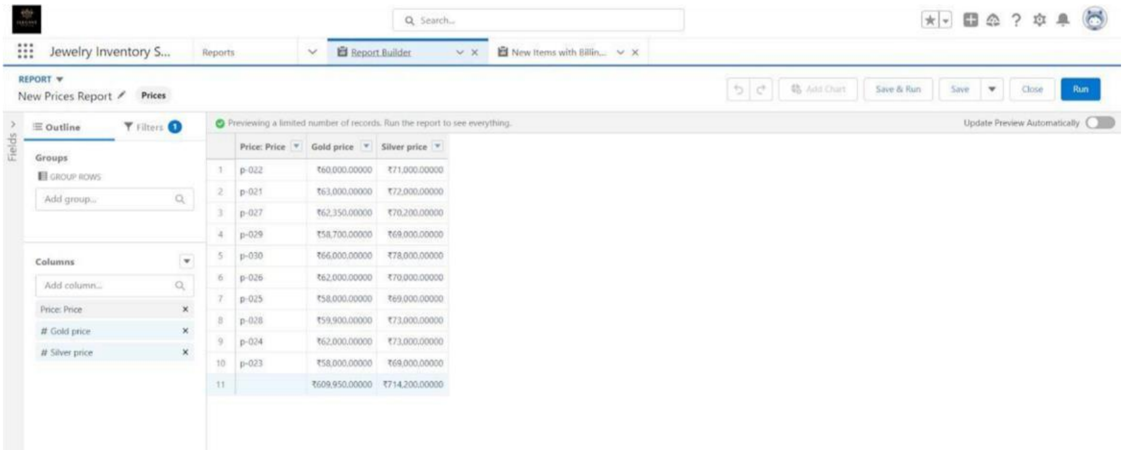
Report

Create Report

1. Go to the app >> click on the reports tab
2. Click New Report.
3. Select report type from category or from report type panel or from search panel ? click on start report. 4.

Customise your report

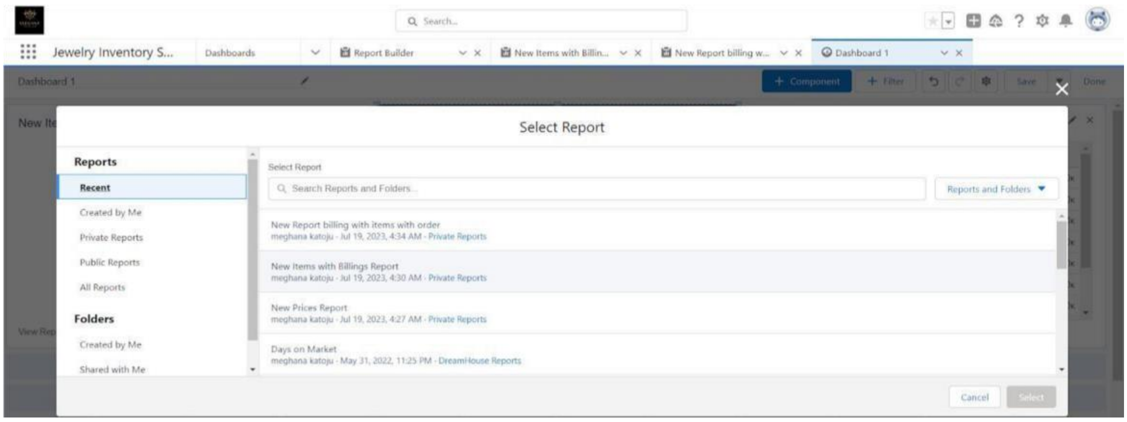
5. Save or run it.



Dashboards

Create Dashboard

1. Go to the app >> click on the Dashboards tabs.
2. Give a Name and click on Create.
3. Select add component.
4. Select a Report and click on select.
5. Click Add then click on Save and then click on Done.

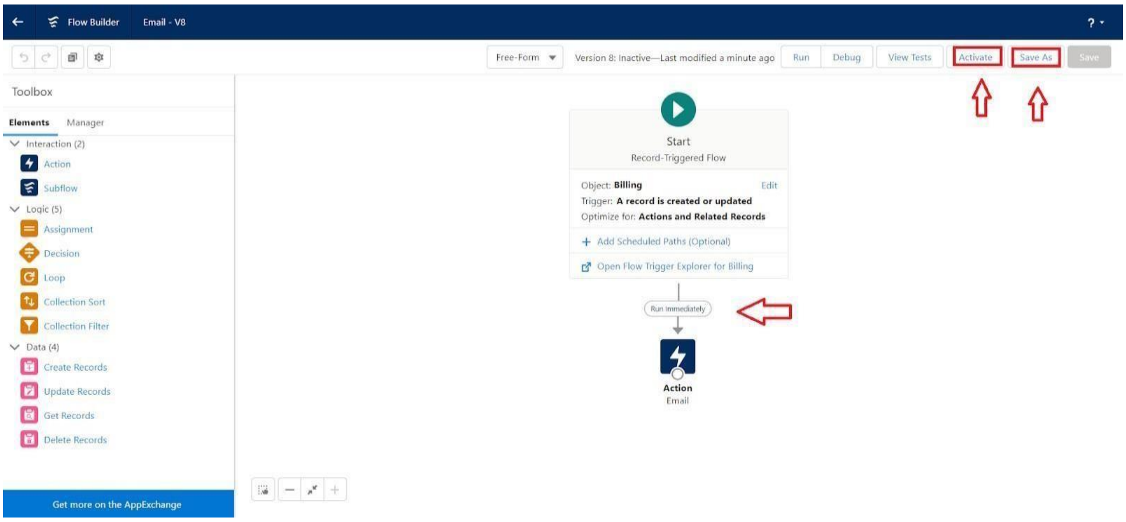


Flows

Create a Flow

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.
2. Select the Record-triggered flow and Click on Create. 3. Select the Object as a "Billing" in the Drop down list.
4. Select the Trigger Flow when: "A record is Created or Updated".
5. Select the Optimise the flow for: "Actions and Related Records" and Click on Done.
6. Now change the mode form Auto-layout to free-form.

7. Now select the manger option in the toolbox, click New resource.
8. Select the resource type as text template.
9. Enter the API name as “ Email body”.
10. Change the view as Rich Text ? View to Plain Text.
11. In the body field paste the syntax that is given below.
12. Hello
13. Customer Name: {!$Record.Item_r.Customer_Name_r.Name}
14. Here are the details for the item you purchased with Jewellery Inventory System
15. Item Type: {!$Record.Item_r.Item_Type_c}
16. Ornament: {!$Record.Ornament_c}
17. Weight: {!$Record.Weight_c}grams 18. Amount: {!$Record.Amount_c} 19. Click done.
20. Now click on elements, and drag the action element into the preview pane.
21. Their action bar will be opened in that search for “ send email ” and click on it.
22. Give the label name as “ notice”
23. API name will be auto populated.
24. Enable the body in set input values for the selected action.
25. Select the text template that was created.
26. Include Recipient Address list, select the email form the record.
27. ({!$Record.Item_r.Customer_Namer.Email_c})
28. Include the subject as “Welcome to Jewelry Inventory System ”.
29. Click done.
30. Now drag the path from the start to the action element.
31. Click on save. Given the Flow label , Flow Api name will be auto populated.
32. And click save, and click on activate.



CONCLUSION

The CRM Jewellery Management project demonstrates how technology can transform traditional jewellery businesses into modern, customer-focused enterprises. By integrating customer data, sales, inventory, billing, and reporting into a single platform, the system ensures efficiency, transparency, and reliability. Its features such as automated workflows, personalized customer engagement, and role-based access help both business owners and staff manage operations smoothly.

Although challenges such as initial setup, training requirements, and cost considerations exist, the long-term advantages clearly outweigh them. This CRM system not only enhances customer loyalty and business growth but also provides a foundation for datadriven decision-making, ensuring competitiveness in the jewellery industry. In conclusion, the project highlights the importance of digital solutions in boosting operational excellence and customer satisfaction, making it a valuable tool for jewellery businesses aiming for sustainable success.