

CRM JEWELLERY MANAGEMENT

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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□

Platform Login Credentials - Pr X Developer Edition with Agentfo X

salesforce.com/form/developer-signup/?d=pb

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

Sign up for your Developer Edition.

- ✓ Build apps fast with drag-and-drop tools
- ✓ Go further with Apex code
- ✓ Build AI agents with Agentforce
- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs

Sign up for your Developer Edition

A free Salesforce Platform environment with Agentforce and Data Cloud

First name Last name

Job title Work email

Company Country/Region

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.

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

Developer Edition with Agentfo X

salesforce.com/form/developer-signup/?d=pb

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

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- ✓ Integrate with anything using APIs

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First name Last name

Job title Work email

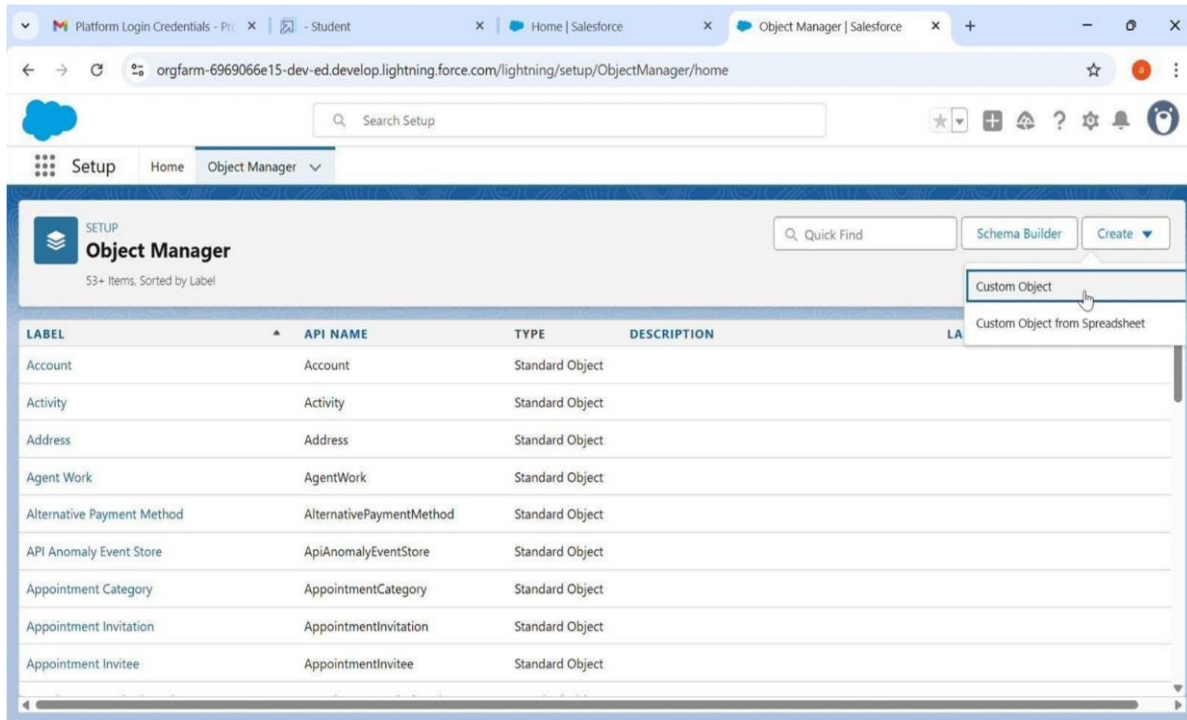
Company Country/Region

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.

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

The screenshot shows the 'New Custom Object' form in Salesforce. The form is titled 'New Custom Object' and has a 'Help for this Page' link. Below the title is a message: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. Tell me more! Don't show this message again.' The form is divided into sections: 'Custom Object Definition Edit' with 'Save', 'Save & New', and 'Cancel' buttons; 'Custom Object Information' with a red 'Required Information' indicator; and a section for defining the object's labels and API name. The 'Label' field has an example of 'Account', the 'Plural Label' field has an example of 'Accounts', and the 'Object Name' field has an example of 'Account'. The 'Description' field is empty.

Platform Login Credentials - Pri... xStudent xHome | Salesforce xNew Custom Object | Salesforce x

orgfarm-6969066e15-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Search Setup

SetupHomeObject 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

Platform Login Credentials - Pri... x Student x Home | Salesforce x New Custom Object | Salesforce x +

orgfarm-6969066e15-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

SETUP New Custom Object

Object Definition

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status [What is this?](#)

☐ In Development

☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☒ Allow Search

Object Creation Options (Available only when custom object is first created)

☐ Add Notes and Attachments related list to default page layout

☐ Launch New Custom Tab Wizard after saving this custom object

Saving... Saving... Saving...

Platform Login Credentials - Pri... x Student x Home | Salesforce x New Custom Object | Salesforce x +

orgfarm-6969066e15-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

SETUP New Custom Object

[Help for this Page](#)

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information ⓘ Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

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

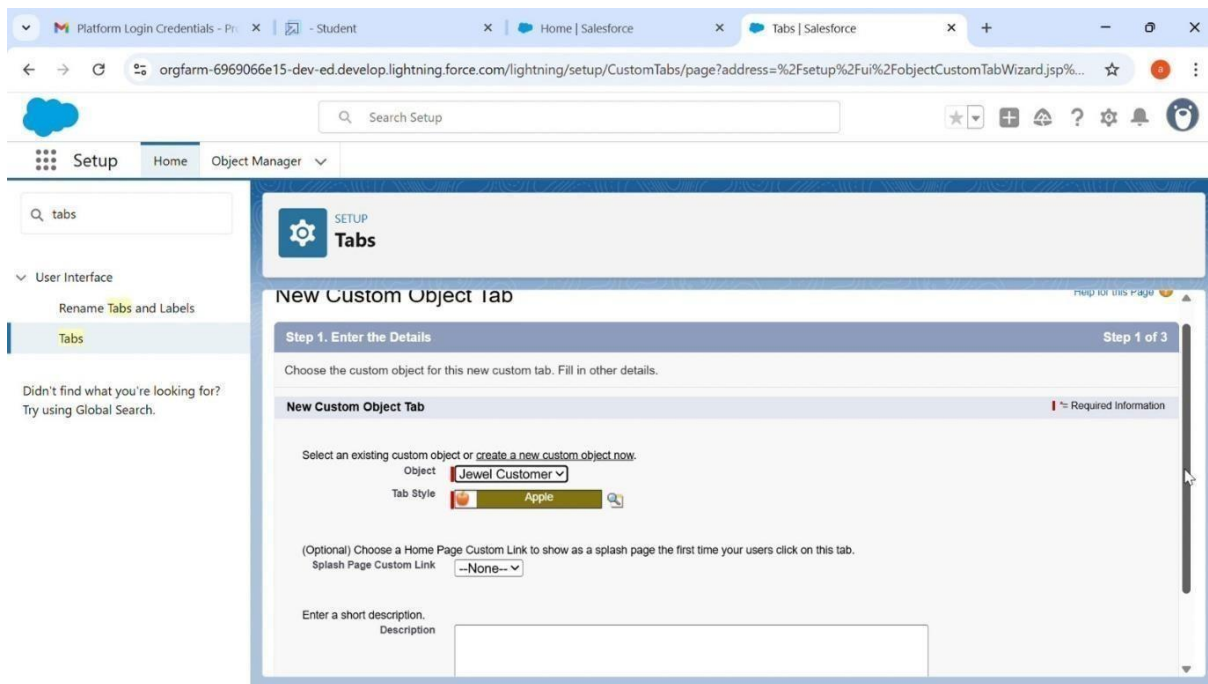
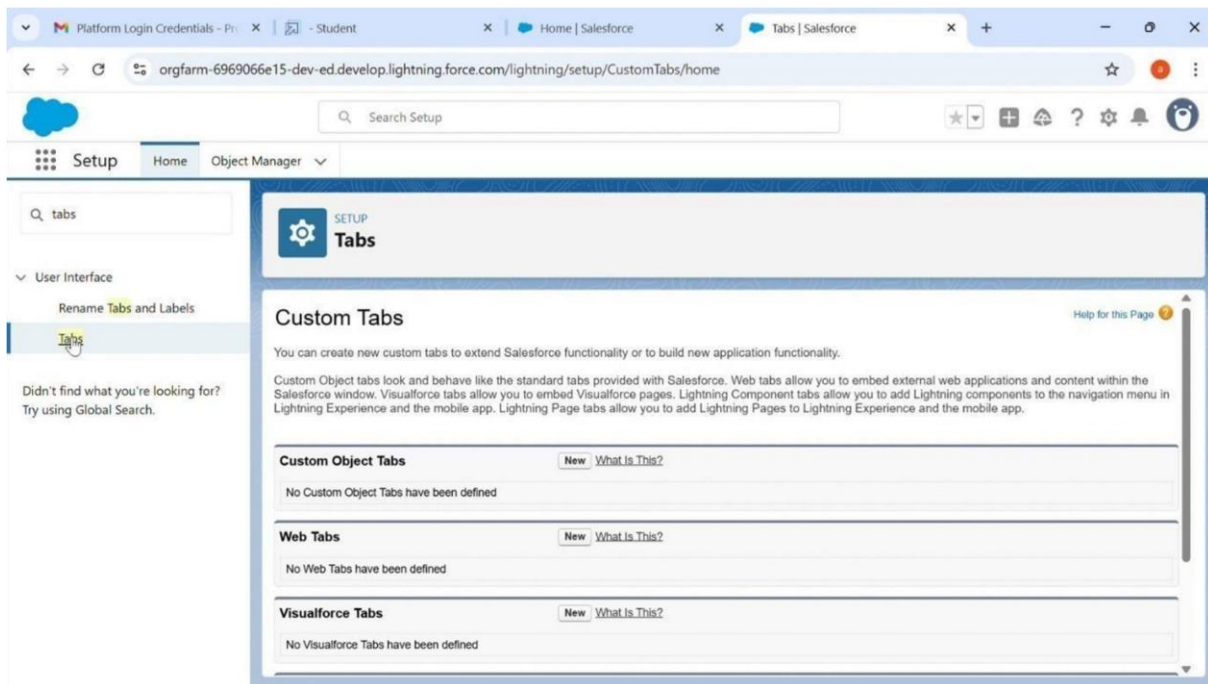
The screenshot shows the 'New Custom Object' page in Salesforce Setup. The breadcrumb trail is Setup > Home > Object Manager > New. The page title is 'New Custom Object'. Below the title, there are sections for 'Context-Sensitive Help Setting', 'Content Name', 'Enter Record Name Label and Format', and 'Optional Features'. The 'Enter Record Name Label and Format' section includes fields for 'Record Name' (Billing Id), 'Data Type' (Auto Number), 'Display Format' (Item-00), and 'Starting Number' (1). The 'Optional Features' section includes checkboxes for 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'.

Tabs

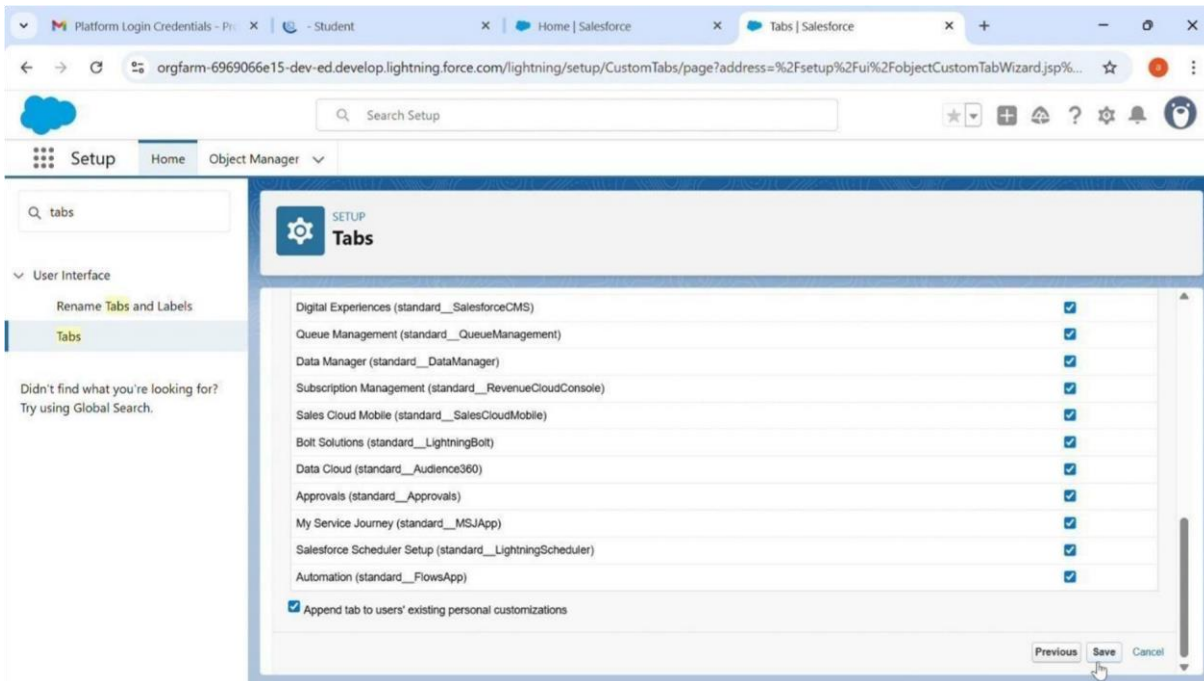
Salesforce Setup Home page with quick-start options for Data Cloud and Einstein Bots, and a sidebar search for "label" under User Interface settings.

The screenshot shows the 'Setup Home' page in Salesforce Setup. The breadcrumb trail is Setup > Home > Object Manager > Home. The page title is 'Home'. Below the title, there are sections for 'Data Cloud' and 'Get Started with Einstein Bots'. The sidebar on the left contains a search bar with the text 'tabq' and a list of items under the 'User Interface' section, including 'Rename Tabs and Labels' and 'Tabs'. The 'Tabs' item is highlighted. Below the sidebar, there is a section titled 'Most Recently Used' with a table of 10 items.

- 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.

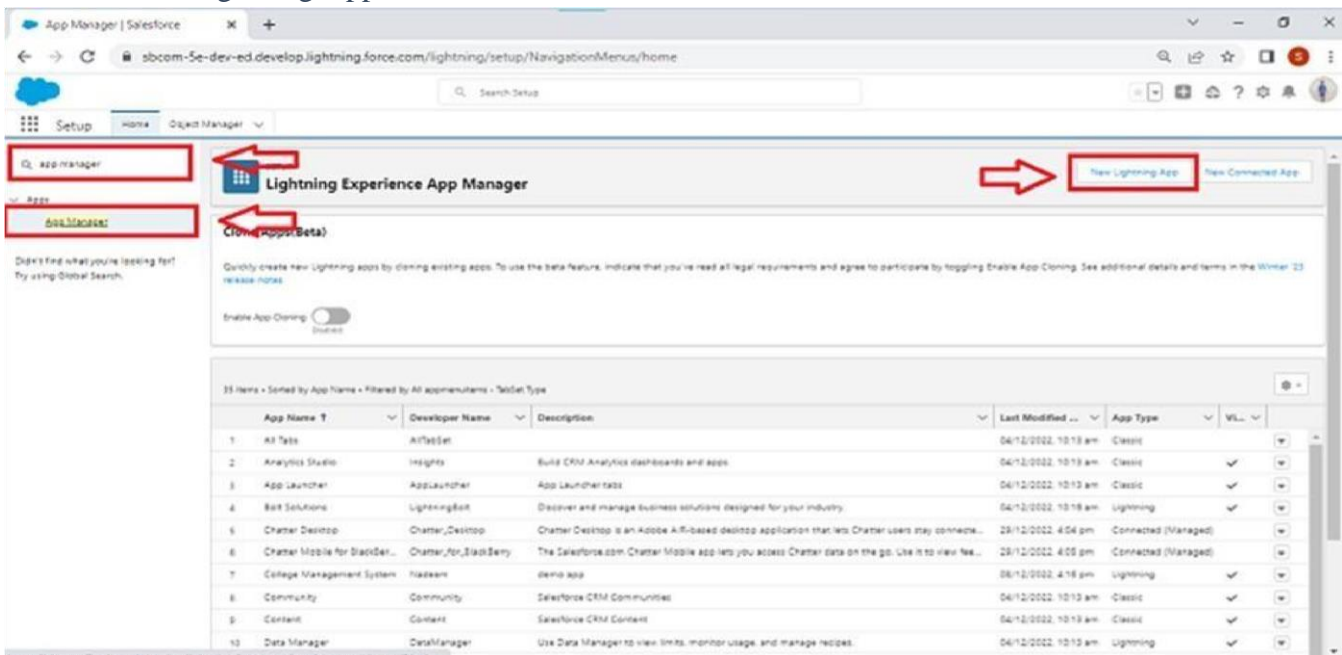


The Lightning App

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.

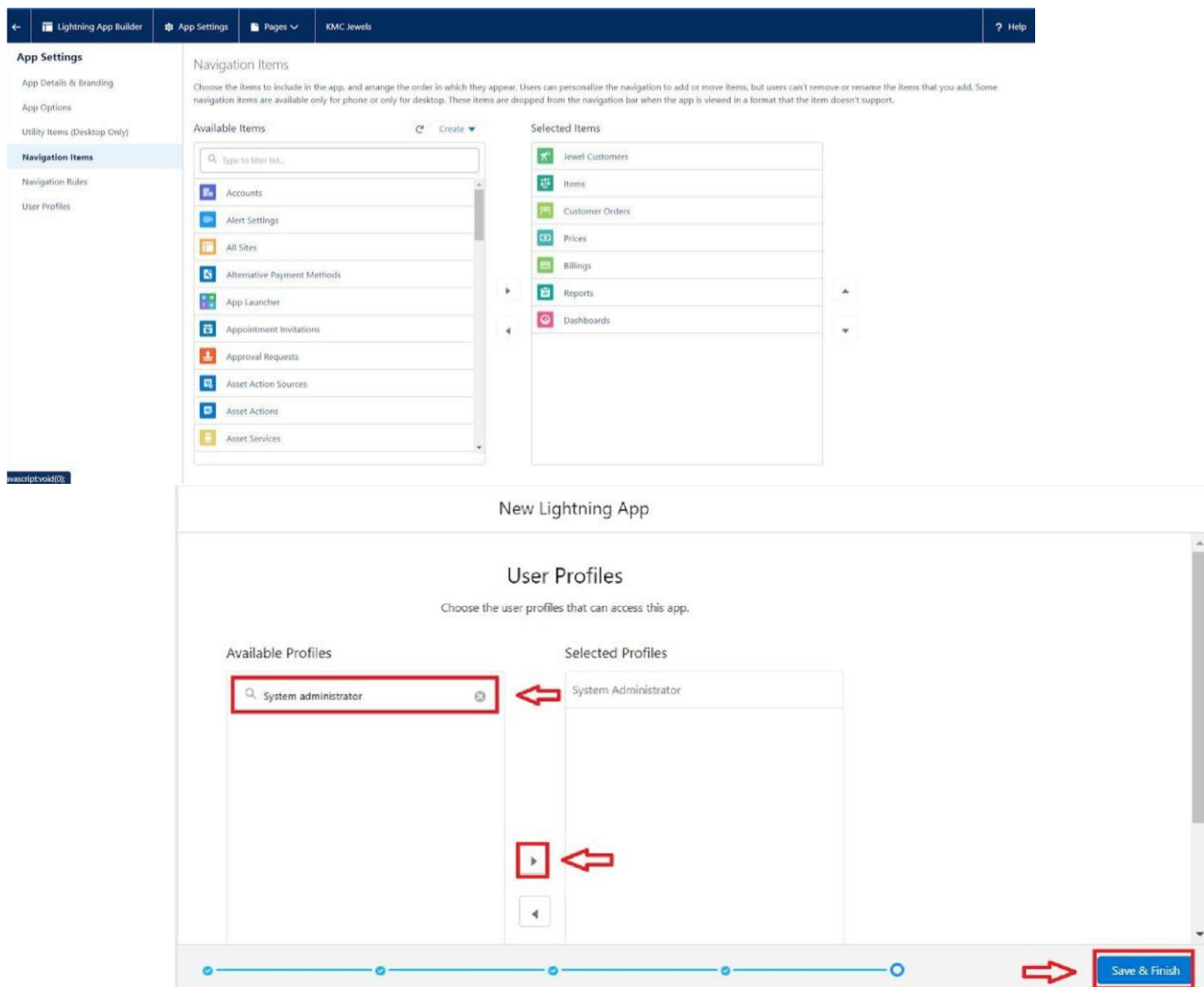


Fill the app name in app details and branding as follow App Name : Jewellery Inventory System.

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...StudentHome | SalesforceCustomer Order | Salesforce

orgfarm-6969066e15-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK0000023xah/FieldsAndRelationships/new

Search Setup

SetupHomeObject 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

Search Favorites

Customer Order

New Relationship

Help for this Page

Step 6. Add custom related lists

Step 6 of 6

PreviousSave & NewSaveCancel

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

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

The image displays two screenshots of the Salesforce Setup interface, specifically the 'Object Manager' section for the 'Customer Order' object. The top screenshot shows 'Step 2. Choose the related object' where the 'Related To' dropdown is set to '--None--'. The bottom screenshot shows 'Step 5. Add reference field to Page Layouts' with a table of field details and a list of page layouts.

Step 2. Choose the related object

Field Label	Item
Data Type	Master-Detail
Field Name	Item
Description	

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

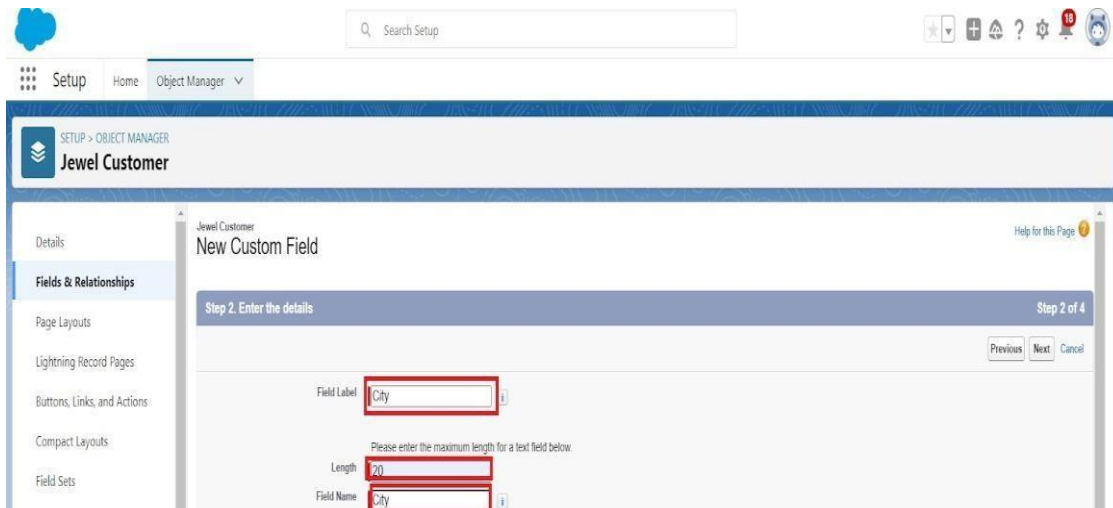
Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Customer Order Layout

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.



The screenshot shows the Salesforce Setup interface. At the top, there is a search bar labeled 'Search Setup'. Below it, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' tab is selected, and the 'Jewel Customer' object is chosen. The 'Fields & Relationships' section is active, showing a 'New Custom Field' wizard. The wizard is at 'Step 2 of 4: Enter the details'. The 'Field Label' is 'City', the 'Length' is '20', and the 'Field Name' is 'city'. The 'Field Type' is 'Text'. There are 'Previous', 'Next', and 'Cancel' buttons at the bottom right of the wizard.

Creating the Phone field in object Jewel Customer

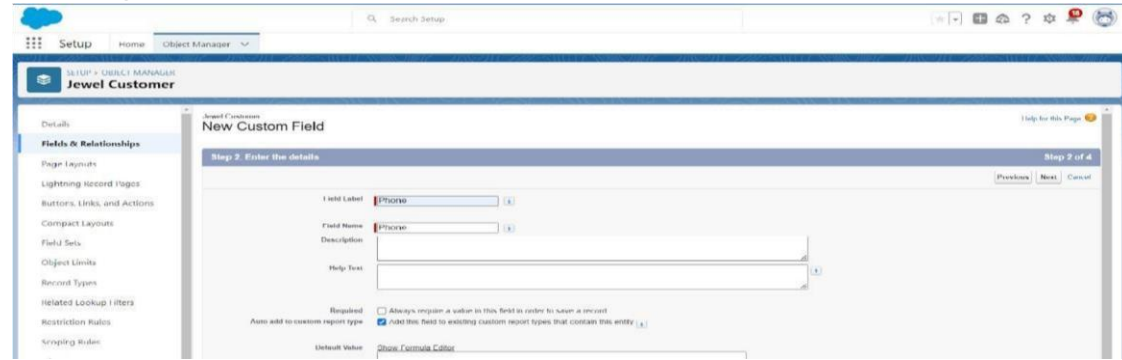
To create fields in an object:

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.

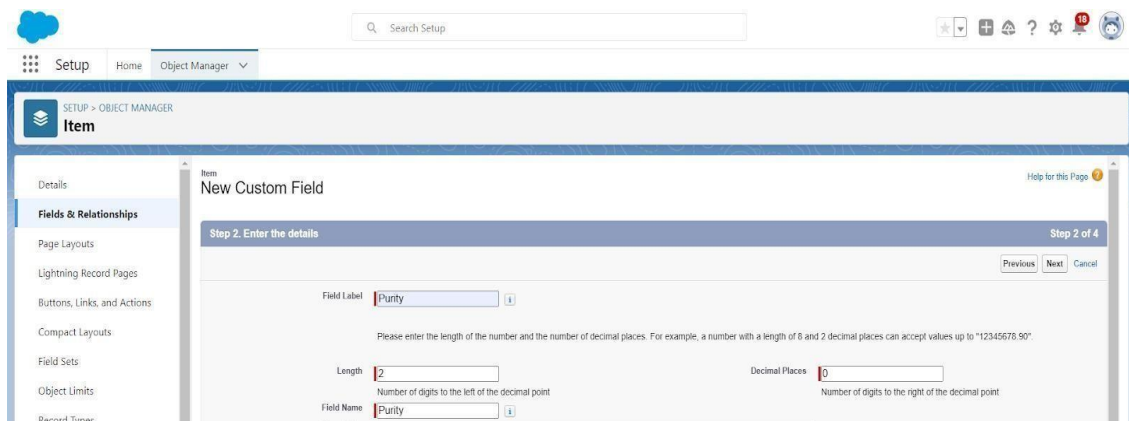
the number field in Item object

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 ”.



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 .

Setup > OBJECT MANAGER

Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Item

New Custom Field

Step 2: Enter the details

Field Label: Item Type

Values:

- ☐ Use global picklist value set
- ☒ Enter values, with each value separated by a new line
 - Gold
 - Silver

☐ Display values alphabetically, not in the order entered
☐ Use first value as default value
☒ Restrict picklist to the values defined in the value set

Field Name: Item_Type

Description:

Previous Next Cancel

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 .

Setup > OBJECT MANAGER

Price

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Price

New Custom Field

Field Label: Gold price

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length: 8

Decimal Places: 0

Field Name: Gold_price

Description:

Help Text:

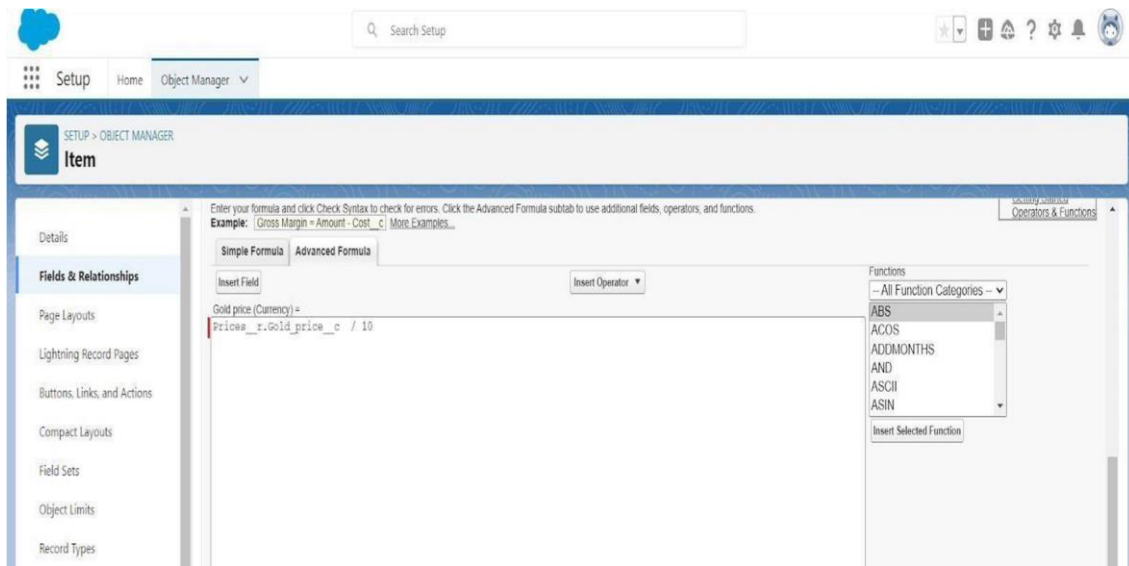
Previous Next Cancel

Creating Formula Field(Cross Object) in Item Object

To create fields in an object:

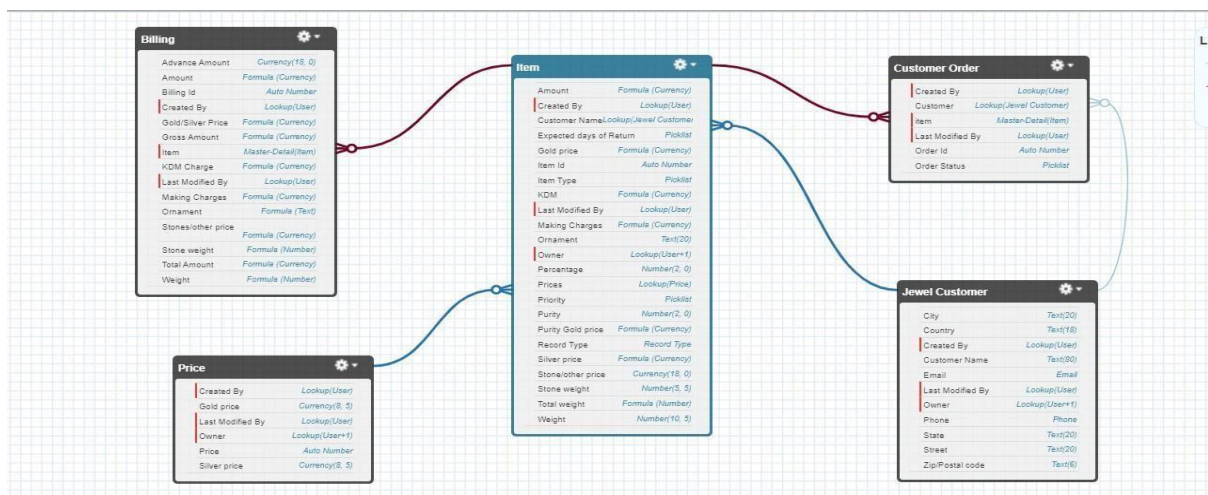
(Note: Create a Lookup Relationship in Item Object to Price Object with Field Name: Prices)

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.

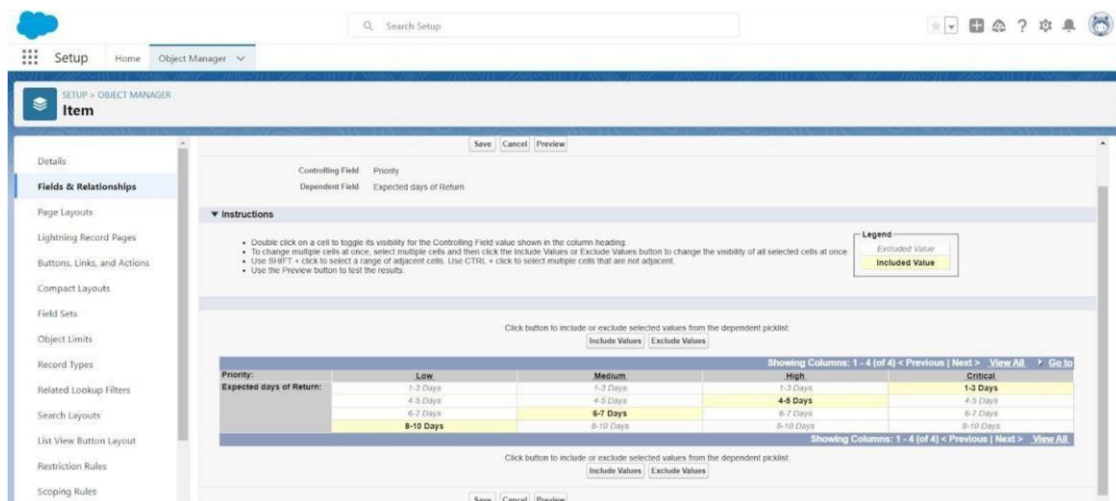


Creating the Field Dependencies

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.

Validation Rule Edit

Rule Name: **Postal Code**

Active: ☒

Description:

Error Condition Formula

Example: `Discount_Percent__c > 0.30` More Examples...

Display an error if Discount is more than 30%

If this formula expression is true, display the text defined in the Error Message area

Insert Field Insert Operator

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

Check Syntax No errors found

Error Message

Example: `Discount percent cannot exceed 30%`

This message will appear when Error Condition formula is true

Error Message: **Must contain 6 digits**

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

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

Profile

Gold Smith Profile

To create a new profile:

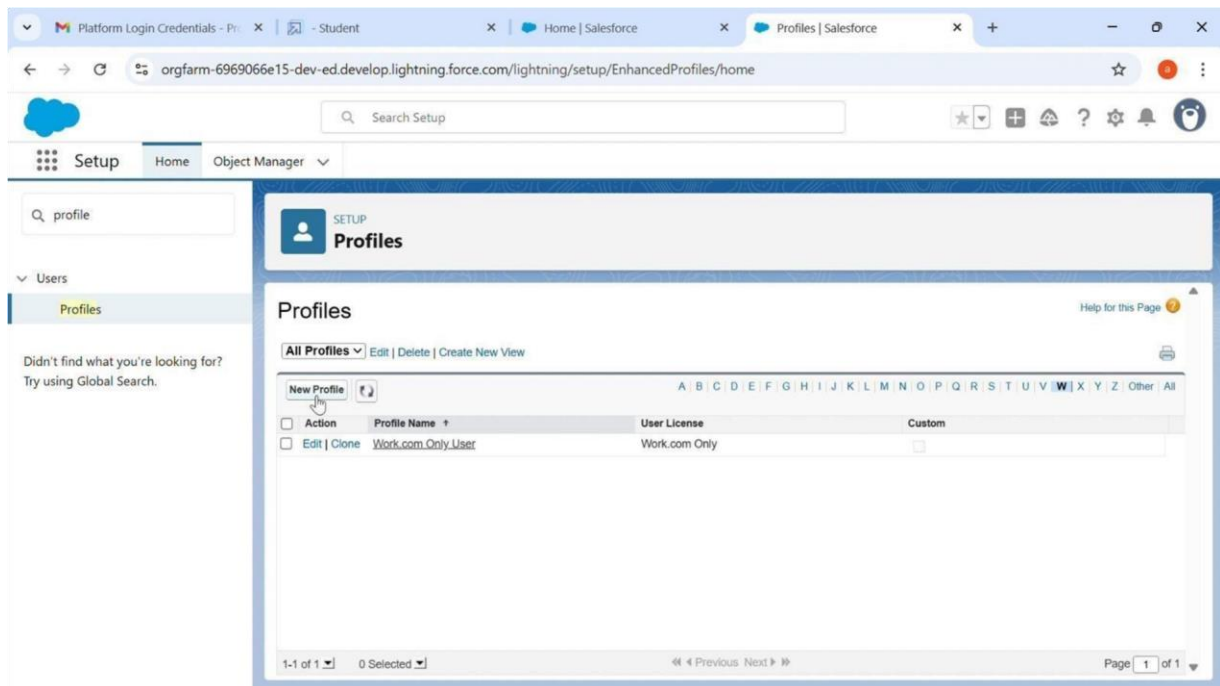
1. Go to setup >> type profiles in quick find box >> click on profiles ? clone the desired profile (System Administrator) >> enter profile name (Gold Smith) >> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Jewel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

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

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.

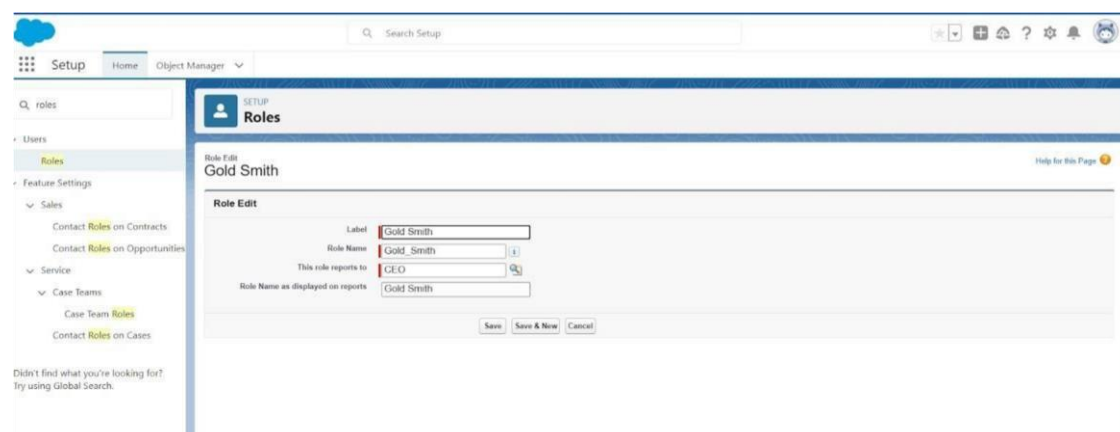
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Items, Price and Customer Order objects.
4. Scroll down and Click on Save.



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.



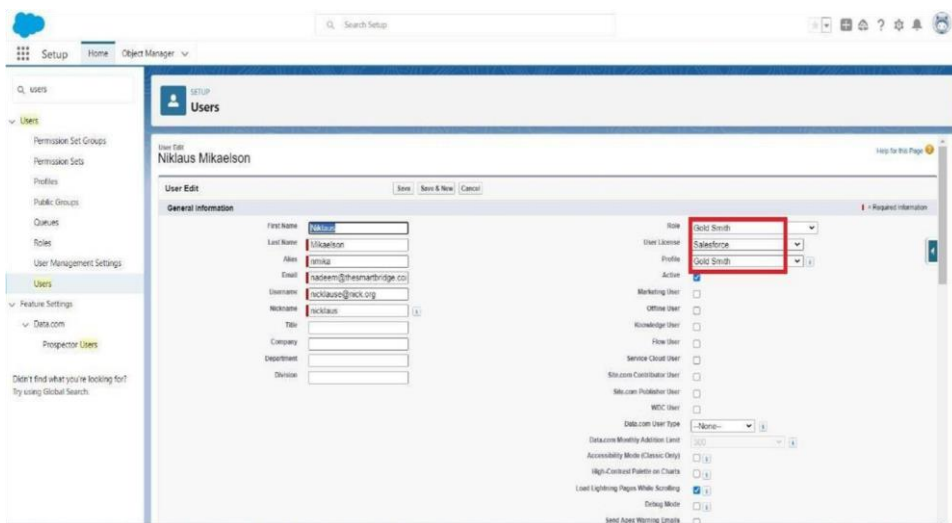
Create one more role as Worker which reports to Gold Smith.



Users

Create User

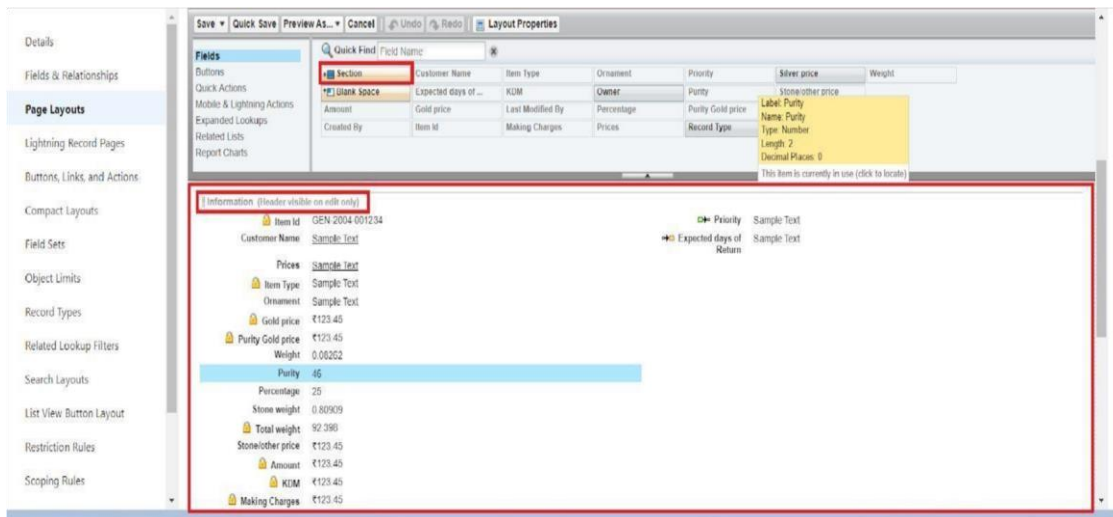
1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
 1. First Name : Niklaus
 2. Last Name : Mikaelson
 3. Alias : Give a Alias Name
 4. Email id : Give your Personal Email id
 5. Username : Username should be in this form: text@text.text
 6. Nick Name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



Page layouts

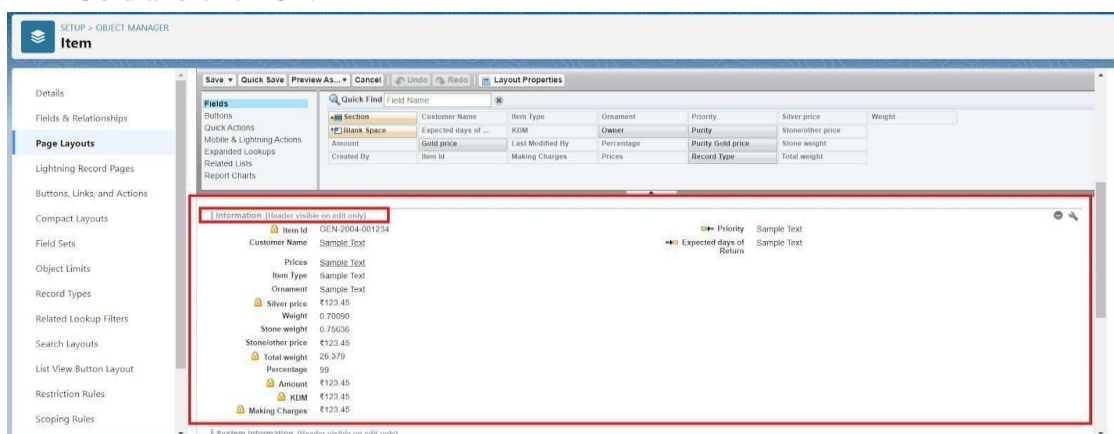
To Create a Gold Page layout

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.



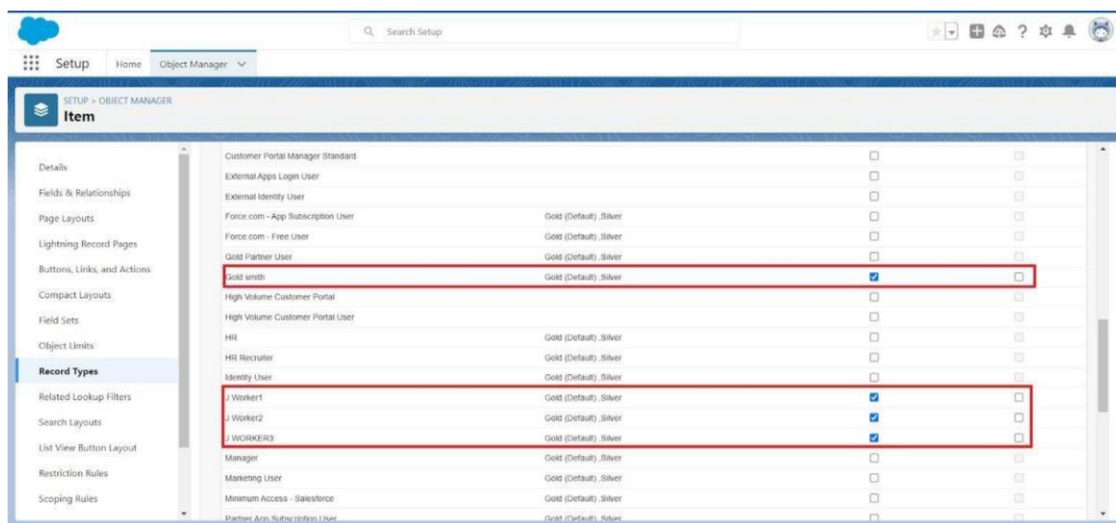
Record Types

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.

... > PERMISSION SET 'PER TO WORKER' > MANAGE ASSIGNMENT EXPIRATION

Per to Worker

Select an Expiration Option For Assigned Users

☒ No expiration date ⓘ
☐ Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

ⓘ Time Zone
 Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Mari deepak	Worker	Worker	✓	Salesforce Platform	Never Expires

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) {
```

```

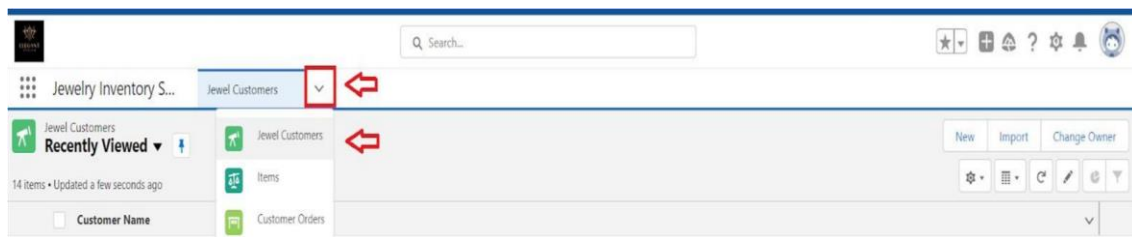
        UpdatePaidAmountTriggerHandler.handleBeforeInsert(Trigger.new);
    } else if (Trigger.isUpdate) {
        UpdatePaidAmountTriggerHandler.handleBeforeUpdate(Trigger.oldMap, Trigger.new);
    }
}

```

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

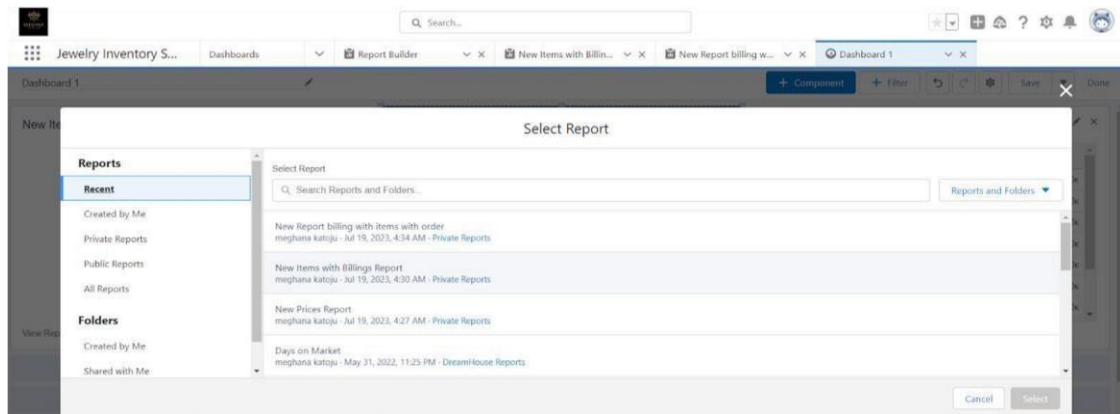
1. Go to the app >> click on the reports tab
2. Click New Report.
3. Select report type from category or from report type panel or from search panel ?
click on start report.
4. Customise your report
5. Save or run it.

	Price: Price	Gold price	Silver price
1	p-022	₹60,000.00000	₹71,000.00000
2	p-021	₹63,000.00000	₹72,000.00000
3	p-027	₹62,350.00000	₹70,200.00000
4	p-029	₹58,700.00000	₹69,000.00000
5	p-030	₹66,000.00000	₹78,000.00000
6	p-026	₹62,000.00000	₹70,000.00000
7	p-015	₹58,000.00000	₹69,000.00000
8	p-028	₹59,900.00000	₹73,000.00000
9	p-024	₹62,000.00000	₹73,000.00000
10	p-023	₹58,000.00000	₹69,000.00000
11		₹609,950.00000	₹714,200.00000

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.

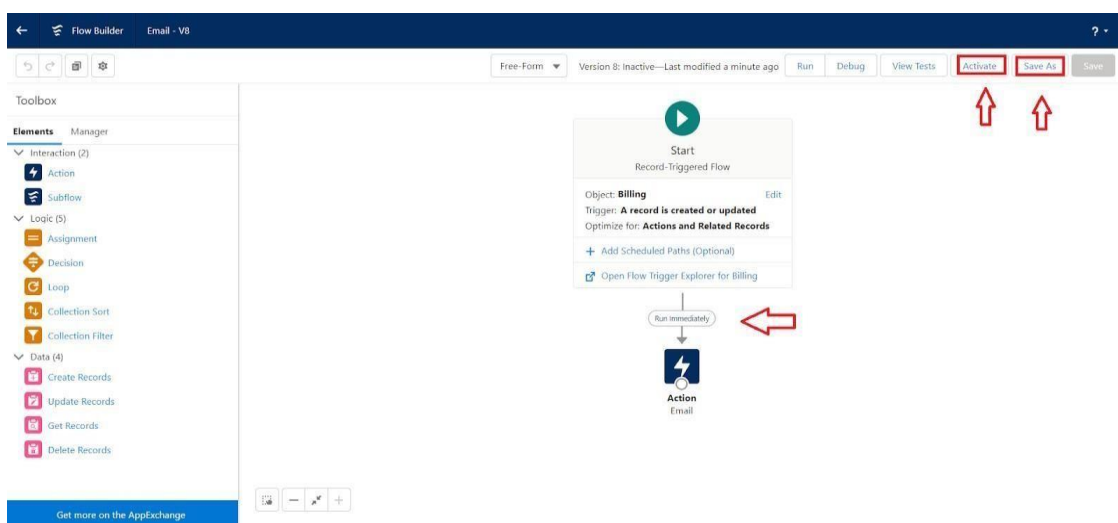


Flows

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 data-driven 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.