

CRM Application for Jewel Management

COLLEGE : R.V.S COLLEGE OF ENGINEERING

TEAM ID: NM2025TMID08095

TEAM SIZE: 4

TEAM MEMBERS DETAILS:

TEAM LEADER : B. SUNDARESWARAN

EMAIL : sundareswaran1569@gmail.com

TEAM MEMBER : MOHAN SHIVANAND

EMAIL : mohanshivanand400@gmail.com

TEAM MEMBER : Kannan. J

EMAIL : kannanjeyaram2005@gmail.com

TEAM MEMBER : MAHA Vishnu .V

EMAIL : mahavishnu6374494959@gmail.com

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.

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
Bobbadi Harshitha	Team
Job title	Work email
Salesforce Developer	bobbadiharshitha4@gmail.com
Company	Country/Region
Ideal Institute of Tech	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, Agentforce, as described in the Developer Documentation. (1) the Developer Edition includes autonomous and other permissive 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. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right says 'Search Setup'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Jewel Customer'. 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 'Details' tab is selected. The main content area displays the 'Details' section for the 'Jewel Customer' object. It includes fields for Description, API Name (set to 'Jewel_Customer__c'), Singular Label ('Jewel Customer'), Plural Label ('Jewel Customers'), and several checkboxes for reports and activities. At the bottom right are 'Edit' and 'Delete' buttons.

2. Item

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right says 'Search Setup'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Item'. 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 'Details' tab is selected. The main content area displays the 'Details' section for the 'Item' object. It includes fields for Description, API Name (set to 'Item__c'), Singular Label ('Item'), Plural Label ('Items'), and several checkboxes for reports and activities. At the bottom right are 'Edit' and 'Delete' buttons.

3. Customer Order

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

Customer Order

Details

Description

API Name: Customer_Order__c

Custom: ✓

Singular Label: Customer Order

Plural Label: Customer Orders

Enable Reports: ✓

Track Activities:

Track Field History:

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

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**

Edit | **Delete**

4. Price

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

Price

Details

Description

API Name: Price__c

Custom: ✓

Singular Label: Price

Plural Label: Prices

Enable Reports: ✓

Track Activities:

Track Field History:

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

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**

Edit | **Delete**

5. Billing

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The left sidebar lists various configuration options for the 'Billing' object. The main panel displays the 'Details' section for the 'Billing' object, including fields like API Name (Billing__c), Singular Label (Billing), and Plural Label (Billings). Other settings shown include 'Enable Reports' (checked), 'Track Activities', 'Track Field History', 'Deployment Status' (Deployed), and 'Help Settings'. The top right corner has 'Edit' and 'Delete' buttons.

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 with the 'Tabs' page selected. The left sidebar shows 'User Interface' and 'Tabs' is highlighted. The main panel displays a 'Custom Object Tab' named 'Jewel Customers'. The 'Custom Tab Definition Detail' table shows the following information:

Tab Label	Jewel Customers	Edit	Delete
Object	Jewel Customer		
Description			
Created By	Bobbadi Harshitha Team	6/22/2025, 8:13 AM	
Modified By	Bobbadi Harshitha Team	6/22/2025, 8:13 AM	
Tab Style	Splash Page Custom Link		
	Airplane		

2. Item

Search Setup

Setup Home Object Manager

User Interface

Rename Tabs and Labels

Tabs

Custom Object Tab

Items

Custom Tab Definition Detail

Tab Label	Items
Object	B2B
Description	
Created By	Bobbadi Harshitha Team 6/22/2025, 6:17 AM

Tab Style: Alarm clock

Splash Page Custom Link

Modified By: [Bobbadi Harshitha Team](#) 6/22/2025, 6:17 AM

Help for this Page

3. Customer Order

Search Setup

Setup Home Object Manager

User Interface

Rename Tabs and Labels

Tabs

Custom Object Tab

Customer Orders

Custom Tab Definition Detail

Tab Label	Customer Orders
Object	Customer Order
Description	
Created By	Bobbadi Harshitha Team 6/22/2025, 6:19 AM

Tab Style: Bell

Splash Page Custom Link

Modified By: [Bobbadi Harshitha Team](#) 6/22/2025, 6:19 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', 'Tabs' is selected. A search bar at the top left contains 'tabs'. The main content area displays a 'Custom Object Tab' titled 'Prices'. Below it, a message says 'Below is the information for the custom tab. Click Edit to change the custom tab.' A 'Custom Tab Definition Detail' table is shown with the following data:

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

At the bottom right of the page, there is a link 'Help for this Page'.

5.Billing

The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. On the left sidebar, under 'User Interface', 'Tabs' is selected. A search bar at the top left contains 'tabs'. The main content area displays a 'Custom Object Tab' titled 'Billings'. Below it, a message says 'Below is the information for the custom tab. Click Edit to change the custom tab.' A 'Custom Tab Definition Detail' table is shown with the following data:

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

At the bottom right of the page, there is a link 'Help for this Page'.

So we get the required all custom tabs as below

Custom Tabs

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

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

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	

Web Tabs

No Web Tabs have been defined.

6.4 Creation of Lightning App

App Name: Jewelry Inventory System

App Details & Branding

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

App Details

* App Name

* Developer Name

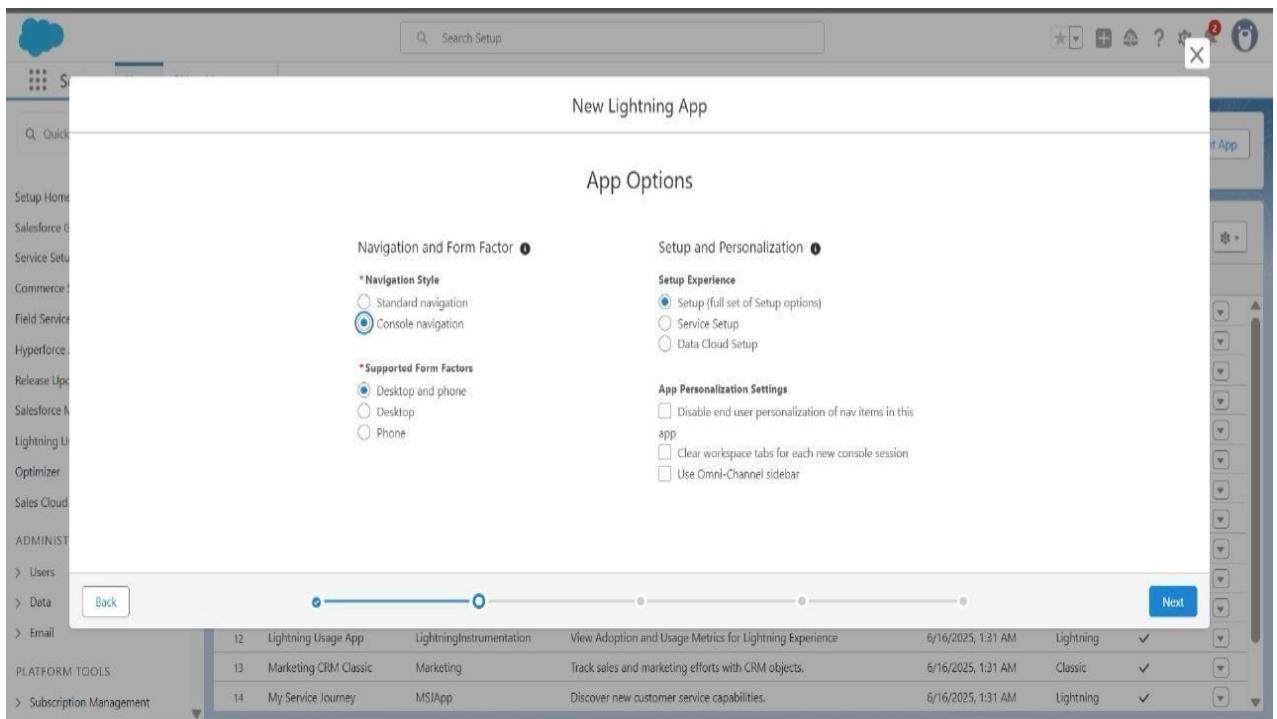
Description

App Branding

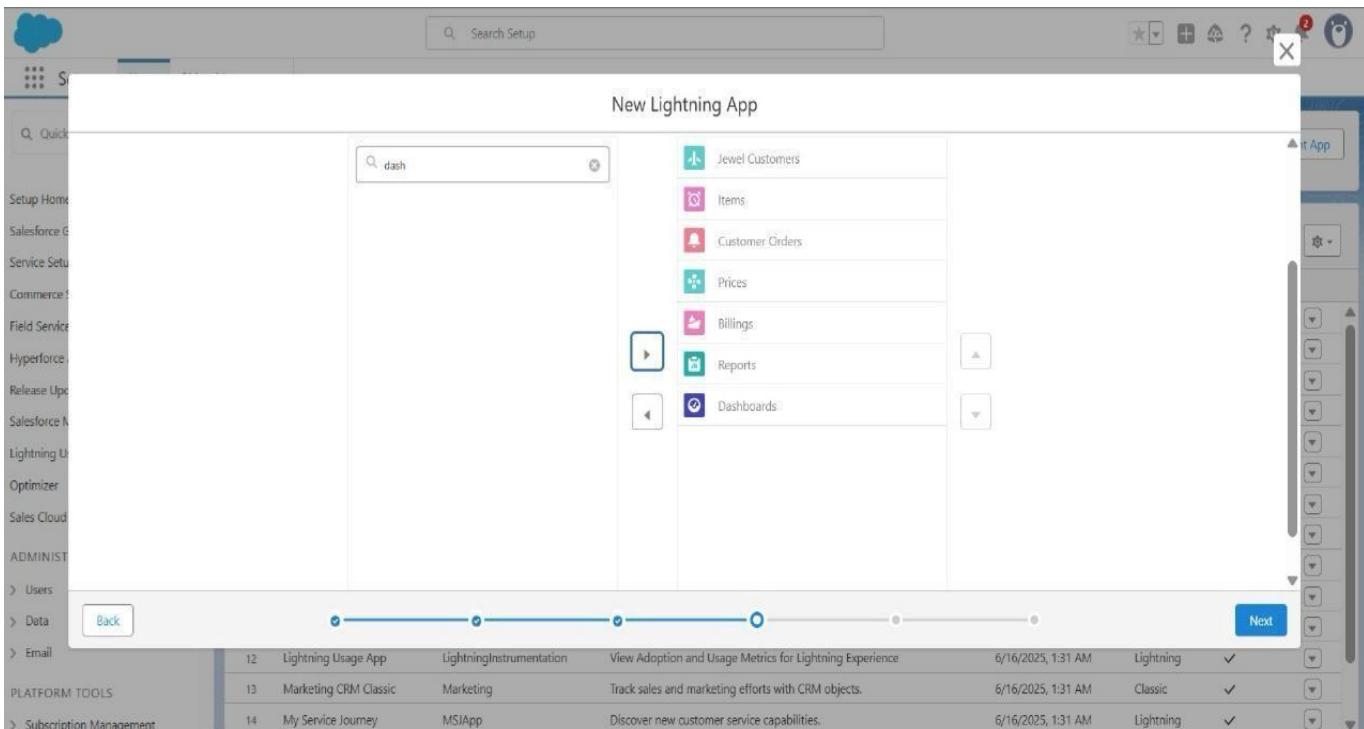
Image Primary Color Hex Value

Org Theme Options Use the app's image and color instead of the org's custom theme.

App Launcher Preview



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, etc. The main area is titled "Customer Order New Relationship Step 3. Enter the label and name for the lookup field". It includes fields for Field Label (Customer), Field Name (Customer), Description, Help Text, and Child Relationship Name (Customer_Orders). There are also checkboxes for Required, What to do if the lookup record is deleted (Clear value), Auto add to custom report type, and Add this field to existing custom report types.

The screenshot shows the continuation of the relationship setup. The main area is titled "Customer Order New Relationship Step 6. Add custom related lists". It displays the configuration for the "Customer" relationship, including its field label, data type (Lookup), field name (Customer), and description. Below this, it asks to specify the title for the related list and provides a "Related List Label" (Customer Orders). It also lists page layouts associated with the parent object and allows adding related lists to them. At the bottom, there are buttons for Previous, Save & New, Save, and Cancel.

2. Creating a Master-Detail Relationship

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

Customer Order

Step 5 of 6

Add Field Page Layout Name
 Customer Order Layout

Previous **Next** **Cancel**

Customer Order

Step 6 of 6

Related List Label Customer Orders

Add Related List Page Layout Name
 Item Layout

Append related list to users' existing personal customizations

Previous **Save & New** **Save** **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

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

Treat "ABC" and "abc" as duplicate values (case insensitive)

Treat "ABC" and "abc" as different values (case sensitive)

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

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

Previous Next Cancel

Help for this Page

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

Help for this Page

4. Creating the Phone field in object Jewel Customer

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. On the right, there are standard setup icons. The main area displays the 'Object Manager' for 'Jewel Customer'. A left sidebar lists various configuration options under 'Fields & Relationships'. The central panel is titled 'Jewel Customer New Custom Field' and is on 'Step 4. Add to page layouts'. The field details are: Field Label: Phone, Data Type: Phone, Field Name: Phone, and Description: (empty). The 'Add Field' checkbox is checked, and the 'Page Layout Name' dropdown contains 'Jewel Customer Layout'. Below the form, instructions state: '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.' and 'To change the location of this field on the page, you will need to customize the page layout.' At the bottom, buttons for 'Previous', 'Save & New', 'Save', and 'Cancel' are visible.

5. Creating the Email field in object Jewel Customer

This screenshot is identical to the previous one, showing the creation of a new custom field 'Email' for the 'Jewel Customer' object. The setup steps, field details, and configuration options for adding it to the page layout are the same. The central panel is titled 'Jewel Customer New Custom Field' and is on 'Step 4. Add to page layouts'. The field details are: Field Label: Email, Data Type: Email, Field Name: Email, and Description: (empty). The 'Add Field' checkbox is checked, and the 'Page Layout Name' dropdown contains 'Jewel Customer Layout'. Below the form, instructions state: '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.' and 'To change the location of this field on the page, you will need to customize the page layout.' At the bottom, buttons for 'Previous', 'Save & New', 'Save', and 'Cancel' are visible.

6. Creating the number field in Item object

The screenshot shows the Salesforce Setup interface for creating a new custom field. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main title is 'Item' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The 'Fields & Relationships' section is selected. The main content area is titled 'New Custom Field' and 'Step 4. Add to page layouts'. It shows the field details: Field Label 'Purity', Data Type 'Number', Field Name 'Purity', and Description. Below this, instructions say to select page layouts for the field. Two checkboxes are shown: 'Add Field' (selected) and 'Page Layout Name' (selected), with 'Item Layout' listed. At the bottom, buttons include 'Previous', 'Save & New' (highlighted), 'Save', and 'Cancel'.

7. Creating Picklist Field in Item Object

This screenshot is identical to the previous one, showing the creation of a new custom field named 'Item Type'. The field is defined as a picklist type. The configuration steps and layout selection are the same, with 'Item Layout' selected for the page layout.

8. Creating Currency Field in Price Object

The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Price' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'New Custom Field' and 'Step 3. Establish field-level security'. The field details are: Field Label: Gold Price, Data Type: Currency, Field Name: Gold_Price, and Description: (empty). A table lists profiles with checkboxes for 'Visible' and 'Read-Only'. Most profiles have 'Visible' checked and 'Read-Only' unchecked.

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

The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Item' object. The left sidebar lists various setup categories. The main area is titled 'Formula Field' and shows a formula editor. The formula is: `Gold Price (Currency) = Gross Margin = Amount - Cost__c / 10`. The editor includes tabs for 'Simple Formula' and 'Advanced Formula', an 'Insert Field' button, an 'Insert Operator' dropdown, and a 'Functions' panel on the right containing various mathematical and logical functions like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. A 'Quick Tips' section provides links to 'Getting Started' and 'Operators & Functions'.

The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Item' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'New Custom Field' and is on 'Step 5 of 5'. The field details are: Field Label: Gold Price, Data Type: Formula, Field Name: Gold_Price, and Description: (empty). A note says: '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.' Below this, there's a checkbox for 'Add Field' and two options: 'Page Layout Name' and 'Item Layout', both of which are checked. A note at the bottom says: 'When finished, click Save & New to create more custom fields, or click Save if you are done.' At the top right, there are 'Help for this Page' and standard save/cancel buttons.

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 Salesforce Setup interface under the Object Manager for the 'Jewel Customer' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Fields & Relationships' and shows a table of existing fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: City (City__c, Text(20)), Country (Country__c, Text(18)), Created By (CreatedBy, Lookup(User)), Customer Name (Name, Text(80)), Email (Email__c, Email), Last Modified By (LastModifiedBy, Lookup(User)), Owner (OwnerId, Lookup(User,Group)), and Phone (Phone__c, Phone). There are also 'Quick Find', 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking' buttons at the top right. A note at the bottom left says: 'List View Button Layout JavaScript:void(0);'.

2.Price : Silver Price

Price

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.

Item

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:

- Object Manager:** Customer Order
- Fields & Relationships:** 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.
- Fields & Relationships Table:**

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		

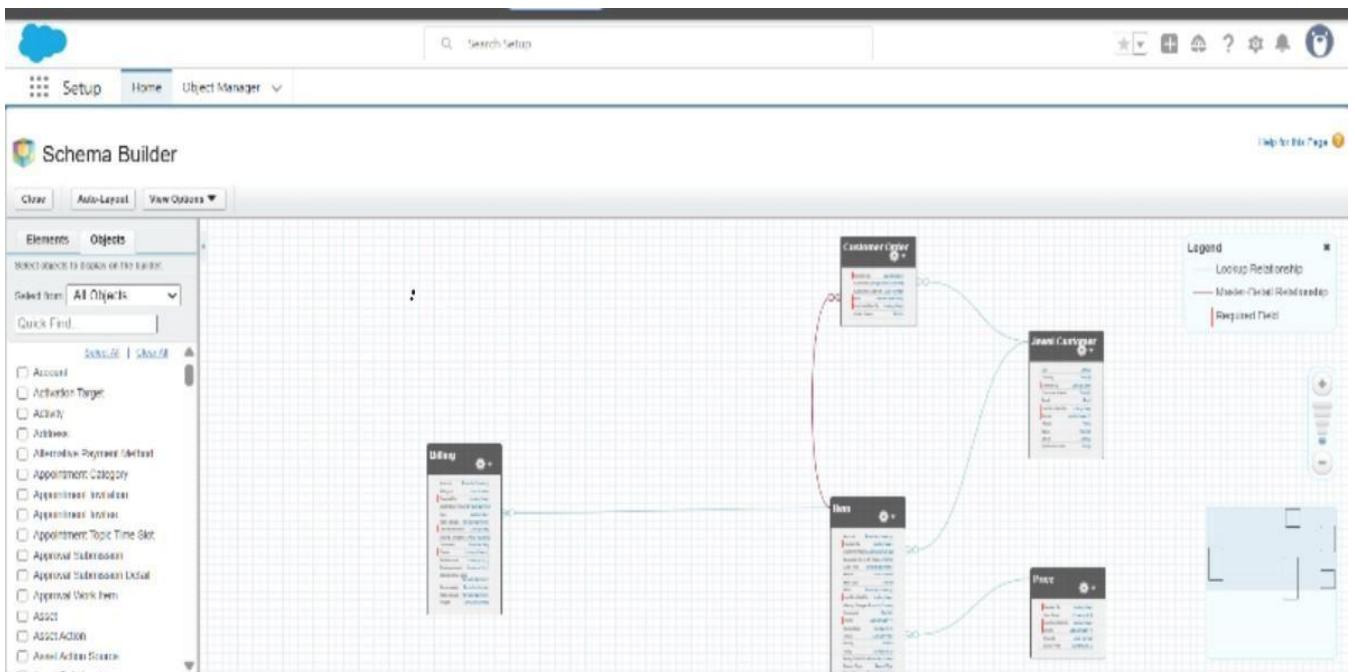
5.Billing: Field Label-Item, Ornament, Stone Weight, Weight, Amount, Gold/Silver Price, KDM Charge, Making Charges,Stone/Other Price, Total Amount.

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

- Object Manager:** Billing
- Fields & Relationships:** 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.
- Fields & Relationships Table:**

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

The screenshot shows the 'Item Field Dependencies' page in the Salesforce Object Manager. The left sidebar lists various customization options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, among others. The main content area is titled 'Item Field Dependencies' and contains a table with the following data:

Action	Controlling Field	Dependent Field	Modified By
Now	Expected Days Of Return	Item	Bobbedi Harshita Team, 6/23/2025, 6:53 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 details for the 'Postal_Code' field. The rule name is 'Postal_Code'. The error condition formula is 'AND(OR(LEN(Zip_Postal_code__c) <= 6, NOT(REGEX(Zip_Postal_code__c, "[0-9]{6}\$"))), NOT(ISBLANK(Zip_Postal_code__c)))'. The error message is 'Must contain 6 digits'. The rule is active and was created by 'Bobbadi Harshitha Team' on 6/23/2025, 6:58 AM, and modified by the same team on the same date at 6:58 AM. The error location is 'ZipPostal code'.

This screenshot shows the same 'Jewel Customer Validation Rule' setup page, but with a different rule configuration. The rule name is now 'ValidationRule_for_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'. The rule is active and was created by 'Bobbadi Harshitha Team' on 6/23/2025, 7:00 AM, and modified by the same team on the same date at 7:00 AM. The error location is 'Top of Page'.

6.6 Creation of Profiles

We create the goldsmith profile and the worker profile

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The left sidebar shows 'Users' and 'Profiles'. The main content area is titled 'Worker Profile' under 'Profile'. It displays the profile details: Name (Worker Profile), User License (Salesforce Platform), Description (Bobbadli Harshitha Team), Created By (Bobbadli Harshitha Team), Modified By (Bobbadli Harshitha Team), and various page layout assignments for different object types like Global, Email Application, Home Page Layout, and Account.

6.7 Creation of Roles

The screenshot shows the Salesforce Setup interface with the 'Roles' tab selected. The left sidebar shows 'Users' and 'Roles'. The main content area is titled 'Ideal Institute of Technology' under 'Roles'. It lists several roles: CEO, CFO, COO, Gold Smith, Worker, SVP, Customer Service & Support, Customer Support, International, and Customer Support, North America. Each role has 'Edit', 'Del', and 'Assign' buttons.

6.8 Creation of Users

6.9 Creation of Page Layouts

We create the page layouts for gold and silver items

Creation of

6.10 Record Types

We create the gold an silver records

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

- Header:** Search Setup, Home, Object Manager.
- Breadcrumbs:** SETUP > OBJECT MANAGER.
- Section:** Item.
- Left Sidebar:** Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types (selected), Related Lookup Filters, Search Layouts, List View Button Layout.
- Table:** Record Types (2 items, Sorted by Record Type Label).

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 Setup interface with the following details:

- Header:** Search Setup, Home, Object Manager.
- Breadcrumbs:** Q: permission sets.
- Section:** Permission Sets.
- Left Sidebar:** Users, Permission Sets (selected).
- Message:** Didn't find what you're looking for? Try using Global Search.
- Table:** Permission Set Overview for 'Per to Worker'.

Description	API Name	Namespace Prefix
License	Per_to_Worker	
Session Activation Required		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
- Section:** 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. The top menu bar includes File, Edit, Debug, Test, Workspace, Help, and a Go To button. A toolbar below the menu shows Code Coverage: None and API Version: 64. The main area displays the Apex code for `UpdatePaidAmountTriggerHandler.apxc`. The code handles the `handleBeforeInsert` trigger for the `Billing__c` object. It loops through a list of new billings and sets the `Paid_Amount__c` field to 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 IDE interface. The top menu bar includes File, Edit, Debug, Test, Workspace, Help, and a Go To button. A toolbar below the menu shows Code Coverage: None and API Version: 64. The main area displays the Apex trigger definition for `UpdatePaidAmountTrigger.apxt`. The trigger is named `UpdatePaidAmountTrigger` and is defined on the `Billing__c` object. It handles both `before insert` and `before update` events. The trigger logic calls the `handleBeforeInsert` and `handleBeforeUpdate` methods of the `UpdatePaidAmountTriggerHandler` class.

```
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

This screenshot shows a Microsoft Dynamics 365 list view for 'Prices'. The top navigation bar includes a cloud icon, the system name 'jewelry Inventory Sy...', and a 'Prices' tab. A search bar and various ribbon icons are also present. The main area displays a table with 10 rows, each representing a price entry. The columns include a checkbox header, 'Price Id', and numbered rows from 1 to 10, each with a corresponding checkbox and the value 'Price-01' through 'Price-10'. The interface uses a clean, modern design with light colors and standard Microsoft UI elements.

	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

This screenshot shows a Microsoft Dynamics 365 list view for 'Jewel Customers'. The top navigation bar includes a cloud icon, the system name 'jewelry Inventory Sy...', and a 'Jewel Customers' tab. A search bar and various ribbon icons are also present. The main area displays a table with 10 rows, each representing a customer entry. The columns include a checkbox header, 'Customer Name', and numbered rows from 1 to 10, each with a corresponding checkbox and the names 'Arjun' through 'Devi'. The interface uses a clean, modern design with light colors and standard Microsoft UI elements.

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

Reports

6.14 Creation of Reports

The screenshot shows the Microsoft Power BI Reports interface. At the top, there's a search bar and a toolbar with various icons. Below the toolbar, the title "jewelry Inventory Sy..." is visible, followed by a "Reports" button. A sidebar on the left contains sections for "Recent" (with 3 items), "REPORTS" (Recent, Created by Me, Private Reports, Public Reports, All Reports), "FOLDERS" (All Folders, Created by Me, Shared with Me), and "FAVORITES" (All Favorites). The main area displays a table with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. There are four entries in the table:

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	
New Item with Billings Report		Private Reports	Bobbadi Harshitha Team	6/25/2025, 10:43 AM	
New Prices Report		Private Reports	Bobbadi Harshitha Team	6/25/2025, 9:56 AM	

6.15 Creation of Dashboards

Dashboard 1

The screenshot shows the Microsoft Power BI Dashboard 1. At the top, there's a search bar and a toolbar with various icons. The dashboard title is "jewelry Inventory Sy..." and it shows two open dashboards: "Dashboard2" and "Dashboard1". The status bar indicates "As of Jun 27, 2025, 6:43 AM" and "Viewing as Bobbadi Harshitha Team". On the right, there are buttons for "Refresh", "Edit", and "Subscribe". The dashboard itself contains three visualizations:

- New Item with Billings Report:** A donut chart titled "Record Count" with the following data:

Value	Count
\$0.00	1
\$98.75	1
\$296.00	1
\$380.24	1
\$1,164.79	1
\$2,823.30	10

Below the chart is a link "View Report (New Item with Billings Report)" and the timestamp "As of Jun 27, 2025, 6:43 AM".
- Billings with Items and Customer Order:** A bar chart titled "Record Count" comparing Gold and Silver item types. Both categories have a count of 5.

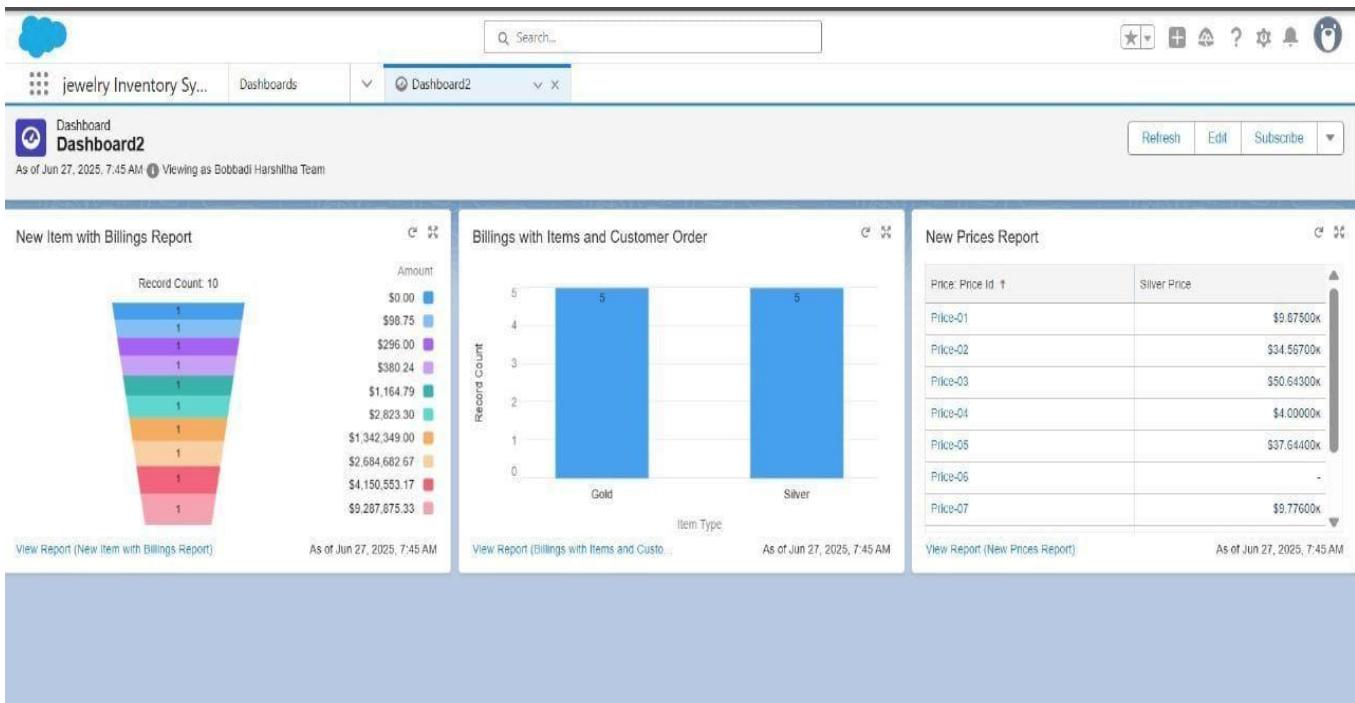
Item Type	Record Count
Gold	5
Silver	5

Below the chart is a link "View Report (Billings with Items and Customer Order)" and the timestamp "As of Jun 27, 2025, 6:43 AM".
- New Prices Report:** A treemap chart titled "Sum of Silver Price: \$132k" showing the distribution of silver prices across different categories. The categories and their values are:

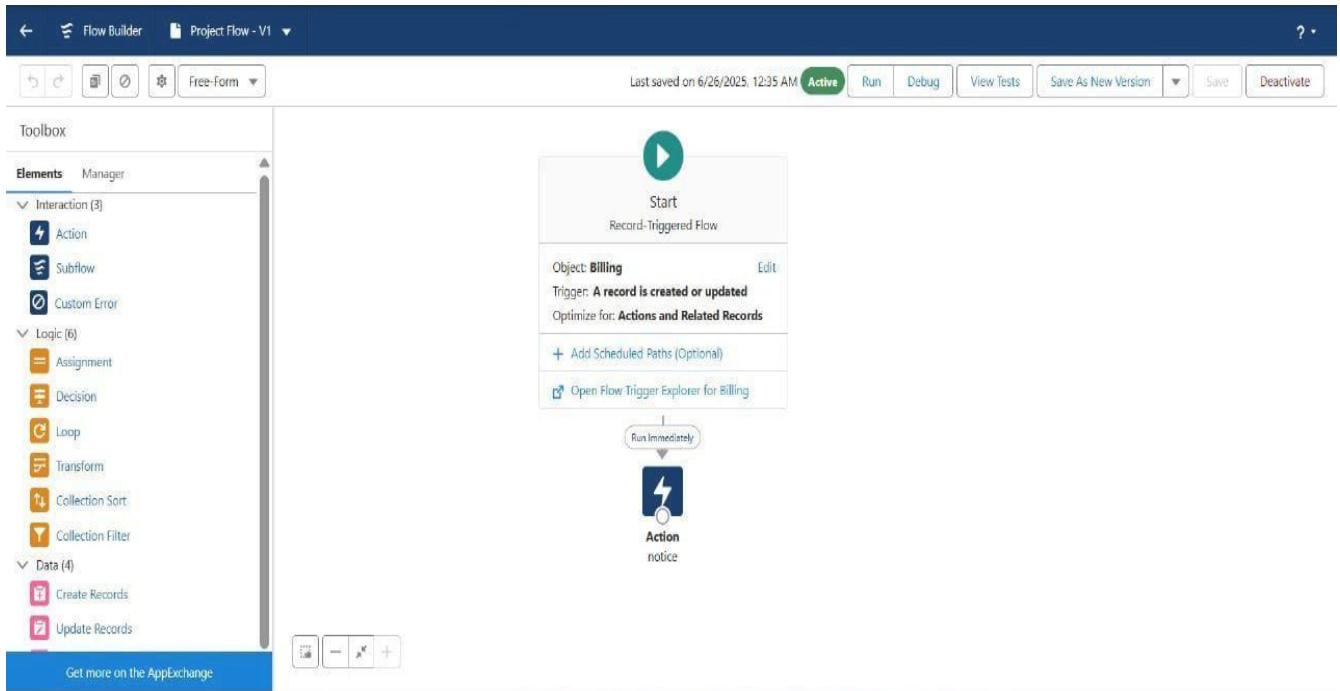
Category	Value
Gold Price	\$5,000 00000
	\$24,780 00000
	\$56,987 00000
	\$57,864 00000
	\$76,534 00000

Below the chart is a link "View Report (New Prices Report)" and the timestamp "As of Jun 27, 2025, 6:43 AM".

Dashboard 2

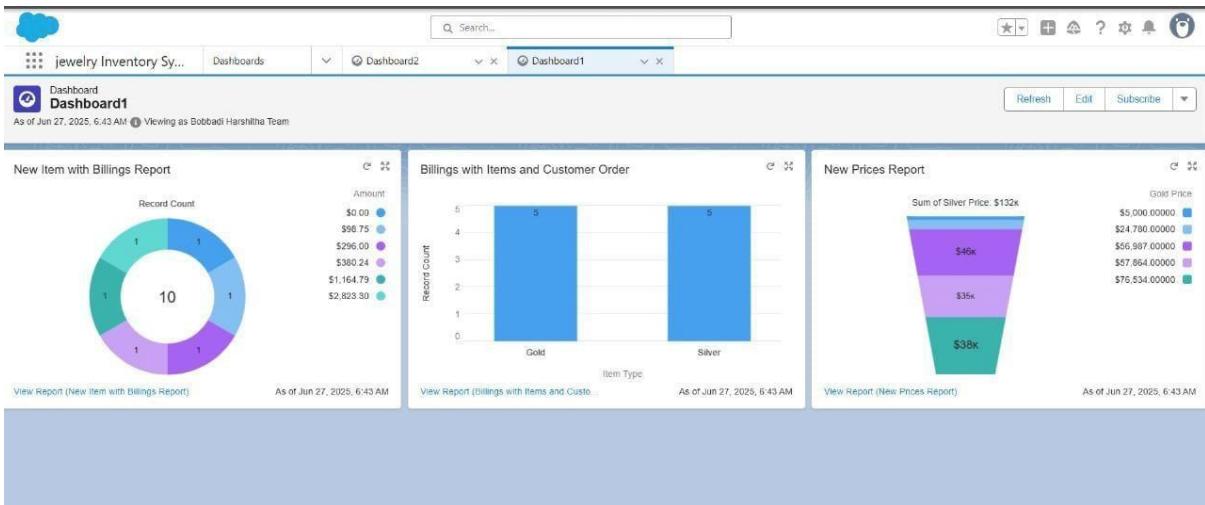


6.16 Creation of Flows



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.

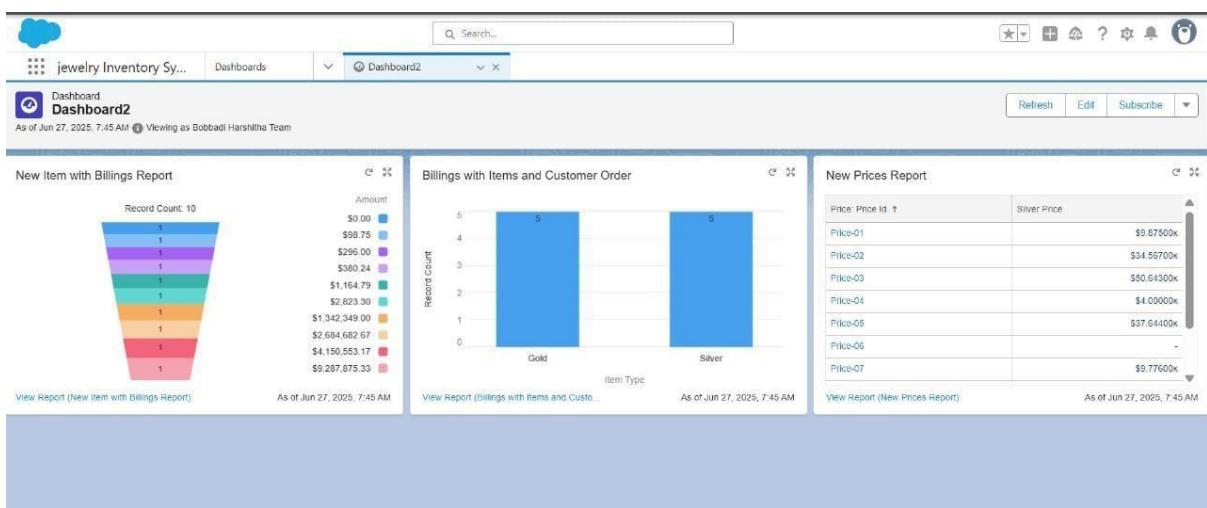
2. Enhance Customer Order Management:

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

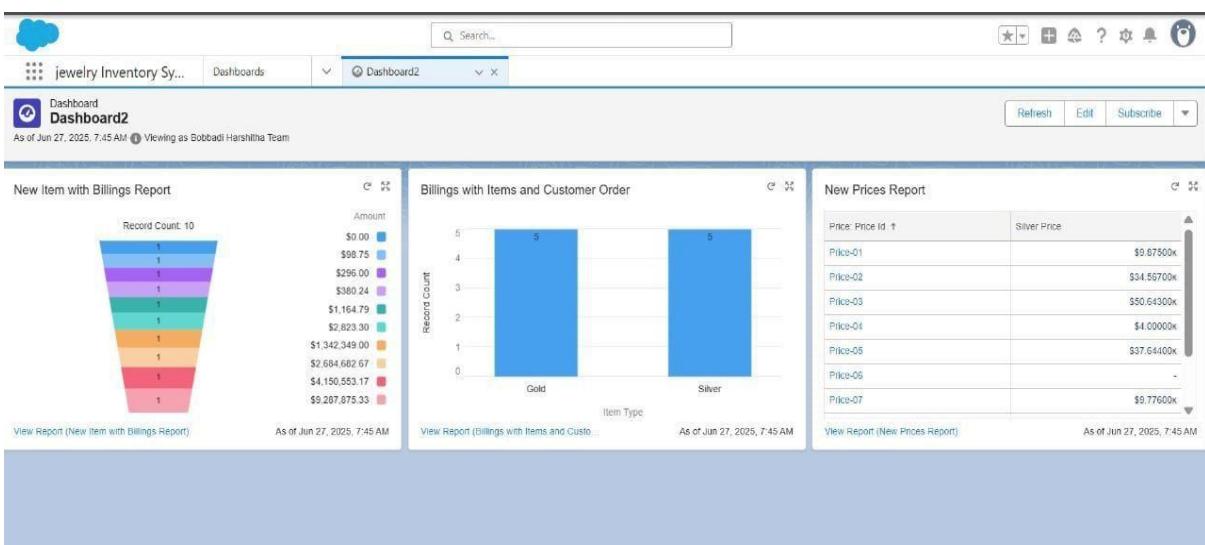
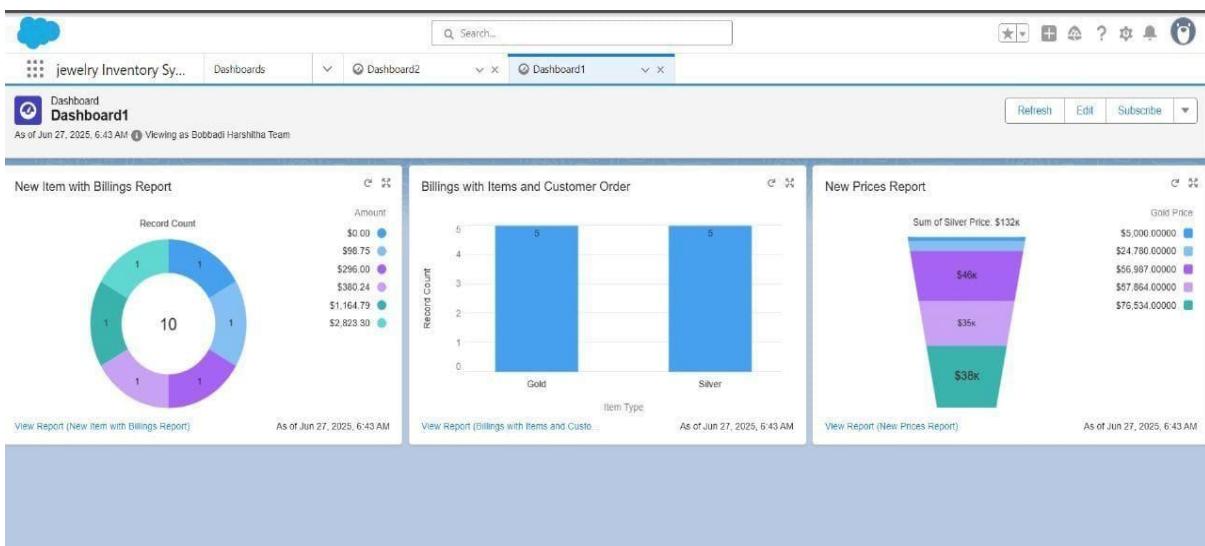
C. Approval Workflow Output:

- **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

Total Records	Total Silver Price						
10	\$642,908.00000						
<input type="checkbox"/> Gold Price ↑	<input type="checkbox"/> Price: Price Id ↴	<input type="checkbox"/> Silver Price ↴					
<input type="checkbox"/> \$0.00 (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	\$9,870.00000					
Subtotal							
<input type="checkbox"/> \$68,987.00000 (1)	Price-09	\$46,670.00000					
Subtotal							
<input type="checkbox"/> \$57,864.00000 (1)	Price-02	\$34,687.00000					
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					
Row Counts	<input checked="" type="checkbox"/>	Detail Rows	<input checked="" type="checkbox"/>	Subtotals	<input checked="" type="checkbox"/>	Grand Total	<input checked="" type="checkbox"/>

New Item with Billings Report

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"/> \$1,342,349.00 (1)	Item-01	Billing-01					
Row Counts	<input checked="" type="checkbox"/>	Detail Rows	<input checked="" type="checkbox"/>	Subtotals	<input checked="" type="checkbox"/>	Grand Total	<input checked="" type="checkbox"/>

Billings with Items and Customer Order Report

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)		

Flows:

The screenshot shows the Salesforce Flow Details page for a flow named 'Project Flow'. The flow is of type 'Record—Run After Save' and is currently 'Activated'. It was last modified on 6/25/2025, 12:05 PM by the 'Bobbadli_Harshitha Team'. The 'Details' tab is selected, showing information such as API Name (Project_Flow), Flow Type (Record-Triggered After Save Flow), and various creation and modification dates. The 'Information' section is expanded, displaying details like Flow Label (Project Flow), Description, Associated Record, and Segment.

The screenshot shows the Salesforce Flow Builder interface for 'Project Flow - V1'. The flow is a 'Record-Triggered Flow' triggered by 'A record is created or updated' on the 'Billing' object. The flow consists of a single step: an 'Action' step with the label 'Action notice'. The 'Run Immediately' checkbox is checked. The builder interface includes a toolbox on the left with categories for Interaction, Logic, and Data elements, and various tool buttons at the top.

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
[Back to List](#)

Apex Trigger Detail

Name: UpdatePaidAmountTrigger	Object Type: Billing
Code Coverage: 0% (0)	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](#)

```
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);
    }
}
```

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.