

CRM Application for Jewel Management

College Name : Sri Vasavi College,
Erode-638316.

College Code : bru17.

TEAM ID : NM2025TMID23275.

TEAM MEMBERS : 4.

Team LeaderName : SURYAPRAKASH.A

Email : aasuryaprakash@gamil.com

Team Member : KAVINRAJ.B

Email : kavinraj2768@gmail.com

Team Member : BHARATH.J

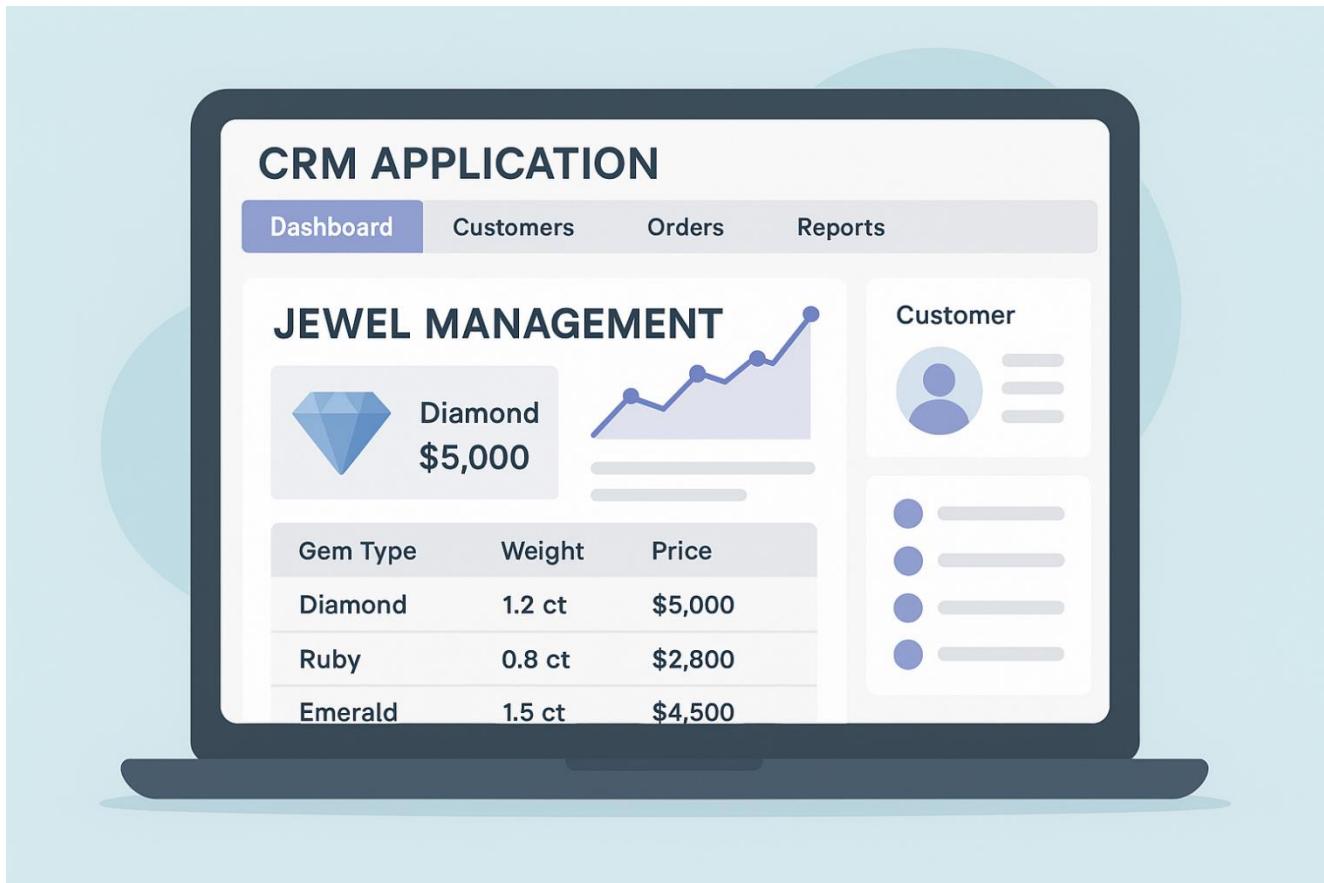
Email : bharatherode2006@gmail.com

Team Member : ABISHEK.S.R

Email : abishek25062006@gmail.com

INTRODUCTION

The Jewel Inventory System is a comprehensive software Solution designed to streamline and manage the inventory and sales processes of a jewellery store or a jewellery manufacturer. The system aims to provide an efficient and user-friendly solution to track and control the inventory of various jewellery items, maintain accurate records, and facilitate seamless sales transactions.



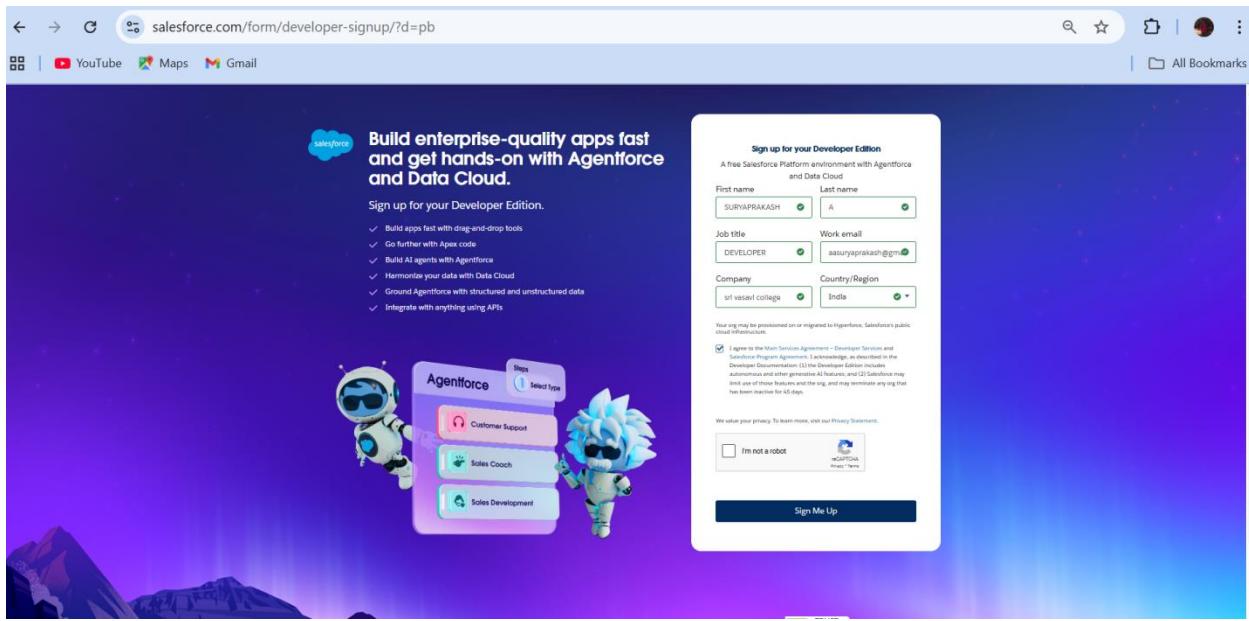
Purpose:

A CRM application for jewel management helps jewelry businesses handle everything in one place. It stores customer details and purchase history, keeps track of jewelry items like type, value, and availability, and monitors sales and orders. It also gives useful reports and insights, making it easier to engage with customers, reduce manual work, and grow the business more efficiently.

DEVELOPMENT PHASE

Creating Developer Account:

- ❖ By using this URL - <https://developer.salesforce.com/signup>



- ❖ Created objects: Jewel Customer, Item, Customer Order, Price, Billing

orgfarm-5dea28eca4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gL000001kroj/Details/view

All Bookmarks

Setup Home Object Manager

Item

Details

Description

API Name
Item__c

Custom
✓

Singular Label
Item

Plural Label
Items

Enable Reports
✓

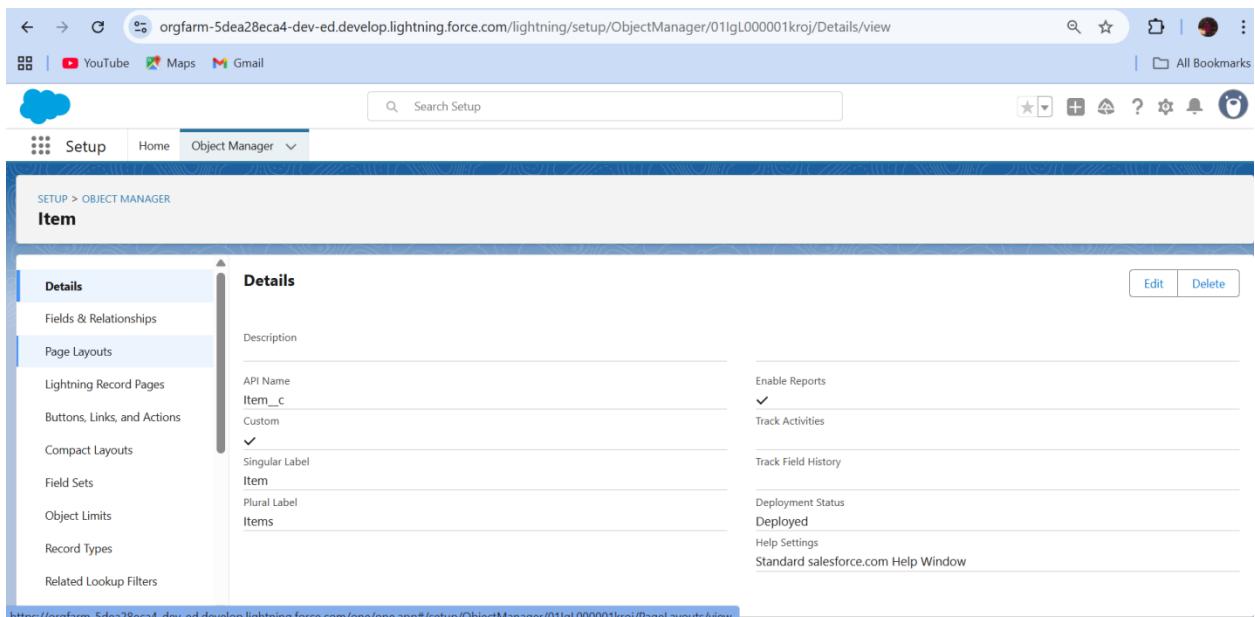
Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete



orgfarm-5dea28eca4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gL000001oEC5/Details/view

All Bookmarks

Setup Home Object Manager

Customer Order

Details

Description

API Name
Customer_Order__c

Custom
✓

Singular Label
Customer Order

Plural Label
Customer Orders

Enable Reports
✓

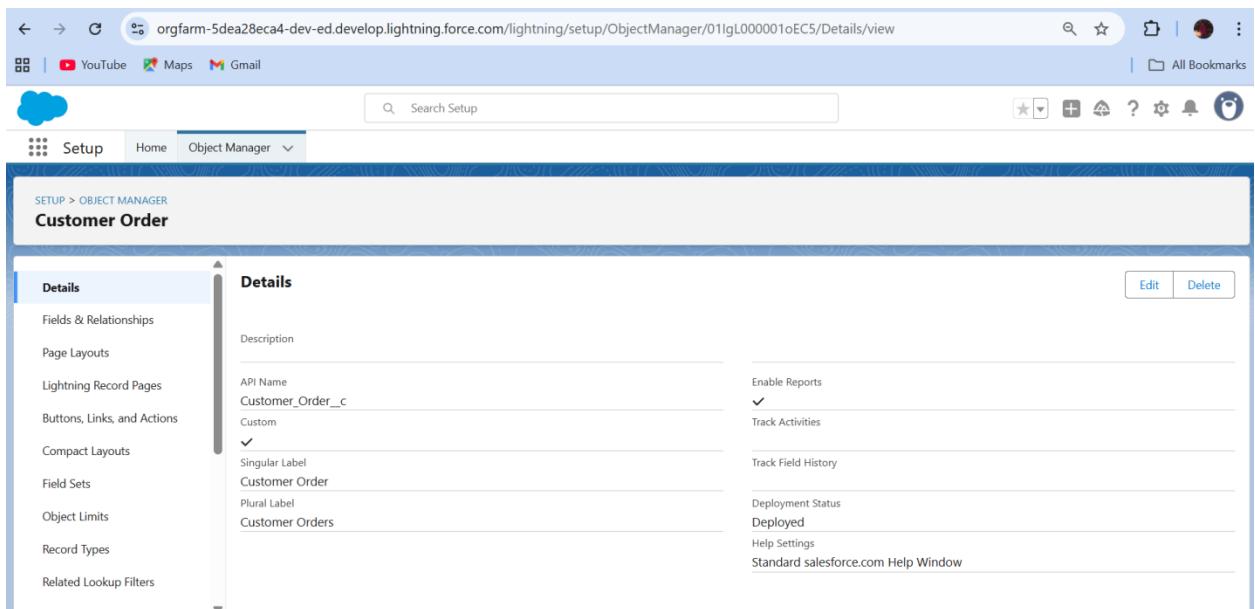
Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete



orgfarm-5dea28eca4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gL000001ksKz/Details/view

YouTube Maps Gmail

Setup Home Object Manager

SETUP > OBJECT MANAGER
Price

Details

Description

API Name
Price__c

Custom

Singular Label
Price

Plural Label
Prices

Details

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

orgfarm-5dea28eca4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gL000001ksRR/Details/view

YouTube Maps Gmail

Setup Home Object Manager

SETUP > OBJECT MANAGER
Billing

Details

Description

API Name
Billing__c

Custom

Singular Label
Billing

Plural Label
Billings

Details

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

- ❖ Created Tabs: Jewel Customer, Item, Customer Order, Price, Billing.

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	Bank	
Edit Del	Customer Orders	Bottle	
Edit Del	Items	Bell	
Edit Del	Jewel Customers	Airplane	
Edit Del	Prices	Boat	

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

No Visualforce Tabs have been defined.

- ❖ Developed Lightning App with relevant tabs

App Settings

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

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

JI Jewellery Inventory System
Elevate your look with elegance

The screenshot shows the Lightning App Builder interface with the 'App Options' tab selected. The left sidebar includes 'App Details & Branding', 'Utility Items (Desktop Only)', 'Navigation Items', 'Navigation Rules', and 'User Profiles'. The main content area is titled 'App Options' and contains sections for 'Navigation and Form Factor' and 'Setup and Personalization'. Under 'Navigation and Form Factor', there are options for 'Navigation Style' (Standard navigation or Console navigation) and 'Supported Form Factors' (Desktop and phone, Desktop, or Phone). Under 'Setup and Personalization', there are sections for 'Setup Experience' (Setup, Service Setup, or Data Cloud Setup), 'App Personalization Settings' (checkboxes for disabling end user personalization, clearing workspace tabs, and using Omni-Channel sidebar), and 'Console Session Settings' (checkboxes for clearing workspace tabs and using Omni-Channel sidebar).

The screenshot shows the Lightning App Builder interface with the 'Navigation Items' tab selected. The left sidebar includes 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)', and 'Navigation Items'. The main content area is titled 'Navigation Items' and displays a list of 'Available Items' and 'Selected Items'. The 'Available Items' list includes: Accounts, Activation Targets, Activations, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations, Approval Requests, and Annual Submission Details. The 'Selected Items' list includes: Jewel Customers, Items, Prices, Customer Orders, Billings, Reports, and Dashboards. Navigation arrows between the lists allow items to be moved.

❖ Configured fields and relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City_c	Text(20)		
Country	Country_c	Text(18)		
Created By	CreatedById	Lookup(User)		
Customer name	Name	Text(80)		
Email	Email_c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Phone	Phone_c	Phone		
State	State_c	Text(20)		

orgfarm-5dea28eca4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001kroj/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Item

Fields & Relationships 24 Items. Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Billing	Billing_c	Lookup(Billing)		✓
Created By	CreatedBy	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)		

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

orgfarm-5dea28eca4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001oEC5/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Customer Order

Fields & Relationships 6 Items. Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Customer	Customer_c	Lookup(Jewel Customer)		✓
Customer Order Id	Name	Auto Number		✓
Item	Item_c	Master-Detail(Item)		✓
Last Modified By	LastModifiedBy	Lookup(User)		✓
Order Status	Order_Status_c	Picklist		

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

orgfarm-5dea28eca4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001ksKz/FieldsAndRelationships/view

YouTube Maps Gmail All Bookmarks

Setup Home Object Manager Search Setup

SETUP > OBJECT MANAGER Price

Details Fields & Relationships

Fields & Relationships 6 Items. Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Gold Price	Gold_Price__c	Currency(8, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
Price Id	Name	Auto Number		✓
Silver Price	Silver_Price__c	Currency(8, 5)		

<https://orgfarm-5dea28eca4-dev-ed.develop.lightning.force.com/one/one.a...>

orgfarm-5dea28eca4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001ksRR/FieldsAndRelationships/view

YouTube Maps Gmail All Bookmarks

Setup Home Object Manager Search Setup

SETUP > OBJECT MANAGER Billing

Details Fields & Relationships

Fields & Relationships 17 Items. Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Billing Id	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Customer Order	Customer_Order__c	Lookup(Customer Order)		✓
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)		

❖ Created profiles:

Action	Profile Name	User License	Custom
Edit Clone	Minimum Access - API Only Integrations	Salesforce Integration	
Edit Clone	Minimum Access - Salesforce	Salesforce	
Edit Clone	Partner App Subscription User	Partner App Subscription	
Edit Clone	Partner Community Login User	Partner Community Login	
Edit Clone	Partner Community User	Partner Community	
Edit Del ...	Read Only	Salesforce	✓
Edit Del ...	Salesforce API Only System Integrations	Salesforce Integration	✓
Edit Clone	Silver Partner User	Silver Partner	
Edit Clone	Solution Manager	Salesforce	
Edit Clone	Standard Platform User	Salesforce Platform	
Edit Clone	Standard User	Salesforce	
Edit Clone	System Administrator	Salesforce	
Edit Clone	Work.com Only User	Work.com Only	
Edit Del ...	Worker	Salesforce Platform	✓

Profile: Gold Smith

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

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

[Login IP Ranges \(0\)](#) | [Enabled Apex Class Access \(0\)](#) | [Enabled Visualforce Page Access \(0\)](#) | [Enabled External Data Source Access \(0\)](#) | [Enabled Named Credential Access \(0\)](#) | [Enabled External Credential Principal Access \(0\)](#) | [Enabled Custom Metadata Type Access \(0\)](#)
[Enabled Custom Setting Definitions Access \(0\)](#) | [Enabled Flow Access \(0\)](#) | [Enabled Service Presence Status Access \(0\)](#) | [Enabled Custom Permissions \(0\)](#)

Profile Detail

Name	Gold Smith	Edit Clone Delete View Users
User License	Salesforce	Custom Profile <input checked="" type="checkbox"/>
Description		
Created By	SURYAPRAKASHA 8/29/2025, 9:43 AM	Modified By SURYAPRAKASHA 8/29/2025, 11:49 PM

Page Layouts

Standard Object Layouts	Global	Location Group Assignment	Location Group Assignment Layout
Email Application	Not Assigned [View Assignment]	Macro	Macro Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Account	Account Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Annointment Invitation	Annointment Invitation Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]

orgfarm-5dea28eca4-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egL000003imKL

Setup Home Object Manager

Search Setup

Users Profiles

Standard Platform User

Profile Standard Platform User

Profile Detail

Name	Standard Platform User
User License	Salesforce Platform
Created By	salesforce.com, Inc. 8/12/2025, 2:23 AM
Modified By	SURYAPRAKASHA 8/29/2025, 11:49 PM

Page Layouts

Standard Object Layouts	Global	Lead
Global Layout	[View Assignment]	Lead Layout [View Assignment]
Email Application	Not Assigned	Location Layout [View Assignment]
Home Page Layout	Not Assigned	Location Group Layout [View Assignment]
Account	Account Layout [View Assignment]	Location Group Assignment Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Object Milestone Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Operating Hours Layout [View Assignment]

avascript:srcUp(%27%2F00egL000003imKL%3FisdtP%3Dp1%27);

❖ Created Roles:

orgfarm-5dea28eca4-dev-ed.develop.lightning.force.com/lightning/setup/Roles/home

Setup Home Object Manager

roles

Users Roles

Executive Staff

CEO, President, CFO, VP Sales

Western Sales Director

Eastern Sales Director

International Sales Director

Western Sales Rep, OR Sales Rep

NY Sales Rep, MA Sales Rep

Asian Sales Rep, European Sales Rep

Set Up Roles

Don't show this page again

The screenshot shows the Salesforce Setup Roles page. The left sidebar has 'Users' expanded, with 'Roles' selected. The main content area is titled 'Creating the Role Hierarchy'. It displays a tree view of roles under 'Your Organization's Role Hierarchy'. The hierarchy includes:

- Sri Vasavi College-Erode.
 - Add Role
 - CEO** Edit | Del | Assign
 - Add Role
 - CFO** Edit | Del | Assign
 - Add Role
 - COO** Edit | Del | Assign
 - Add Role
 - Gold Smith** Edit | Del | Assign
 - Add Role
 - SVP_Customer Service & Support** Edit | Del | Assign
 - Add Role
 - SVP_Human Resources** Edit | Del | Assign
 - Add Role
 - SVP_Sales & Marketing** Edit | Del | Assign
 - Add Role

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

❖ Created Users:

The screenshot shows the Salesforce Setup Users page. The left sidebar has 'Users' expanded, with 'Users' selected. The main content area shows a user profile for 'Niklaus Mikaelson'. The profile includes:

User Detail

User Detail		Edit Sharing Reset Password Freeze View Summary	
Name	Niklaus Mikaelson	Role	Gold Smith
Alias	surya	User License	Salesforce
Email	aasuryaprakash@gmail.com [Verify]	Profile	Gold Smith
Username	aasuryaprakash@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	surya78	Marketing User	<input type="checkbox"/>
Title		Office User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
Ann Registration One-Time Password			
Load Intrinsic Pages While Scrolling			

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-5dea28eca4-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005gL000006s1QH%3Fnoredirect%3...>. The page is titled "Users" under the "User" section of the navigation bar. The main content displays the "User Detail" for "Kol Mikaelson". The user's name is listed as "Kol Mikaelson" with an alias "kmika". The email address is "surya@gmail.com [Verify]" and the username is "surya78@salesforce.com". The nickname is "User1756486961473986052". The title is "Delegated Approver Manager". The user has a role of "Worker" and a license of "Salesforce Platform". The user is active and has a marketing user profile. The time zone is "(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)". The locale is "English (United States)" and the language is "English". The user has a mobile push registration with a status of "View". The accessibility mode is set to "Classic Only". The page also includes links for "Receive Approval Request Emails" and "Federation ID". The bottom of the page features a note about "Announcements One-Time Discrepancy".

❖ Created page layouts:

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-5dea28eca4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001kroj/PageLayouts/view>. The page is titled "Page Layouts" under the "Item" section of the navigation bar. The left sidebar shows various setup categories like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area lists three page layouts: "Item Layout" created by SURYAPRAKASH A on 8/26/2025, 6:12 AM; "Page Layout for Gold" created by SURYAPRAKASH A on 8/29/2025, 10:11 AM; and "Page Layout for Silver" created by SURYAPRAKASH A on 8/29/2025, 10:21 AM. The table includes columns for "PAGE LAYOUT NAME", "CREATED BY", and "MODIFIED BY". There are also "Quick Find", "New", and "Page Layout Assignment" buttons at the top right.

❖ Created Record Type:

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

- Page Header:** orgfarm-5dea28eca4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001kroj/RecordTypes/view
- Search Bar:** Search Setup
- Top Navigation:** 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
 - Restriction Rules
 - Scoping Rules
- Table:** Record Types

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	SURYAPRAKASH A, 8/29/2025, 10:32 AM
Silver	Silver items information	✓	SURYAPRAKASH A, 8/29/2025, 10:34 AM
- Buttons:** Quick Find, New, Page Layout Assignment

❖ Created permission sets:

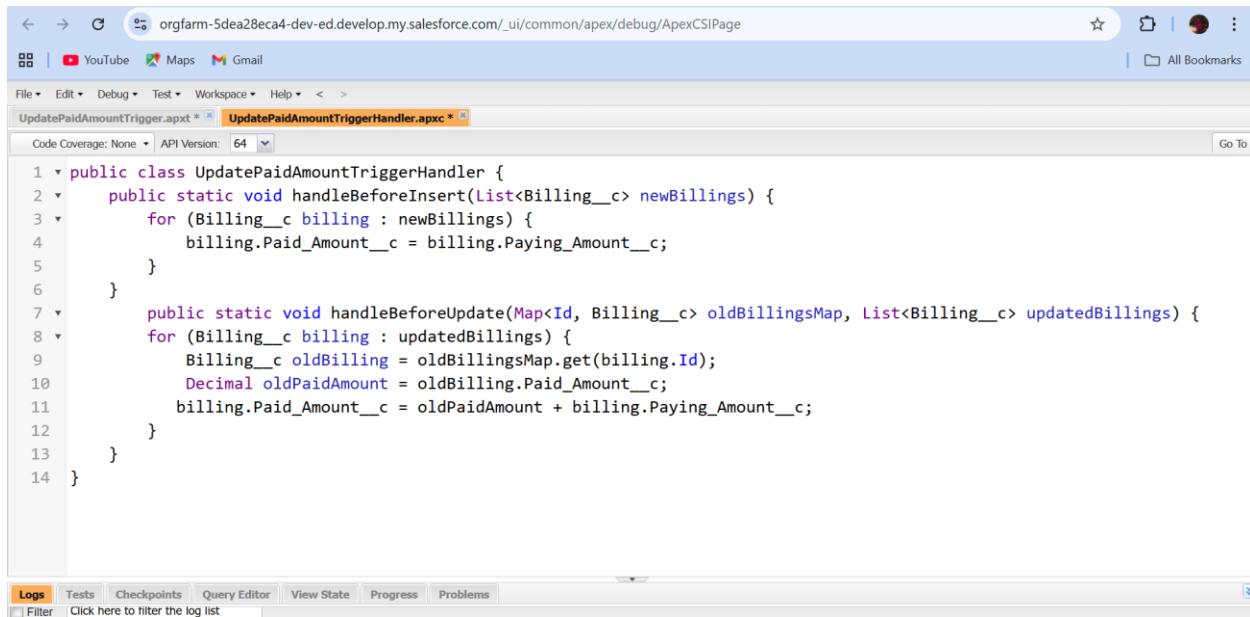
The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** orgfarm-5dea28eca4-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PSgL0000066IGZ
- Search Bar:** Search Setup
- Top Navigation:** Setup, Home, Object Manager
- Breadcrumbs:** SETUP
- Section:** Permission Sets
- Left Sidebar:**
 - Hyperforce Assistant
 - Users
 - Permission Set Groups
 - Permission Sets** (selected)
 - Apps
 - Mobile Apps
 - Salesforce
 - Mobile Builder for the Seller-Focused Experience
 - Feature Settings
 - Digital Experiences
 - Salesforce CMS
 - Settings
 - Functions
 - Sales
 - Accounts
 - Person Accounts
 - Calendars
- Table:** Permission Set Overview

Description	API Name: Per_to_Worker
License	Namespace Prefix: SURYAPRAKASHA
Session Activation Required	Created By: SURYAPRAKASH A, 8/29/2025, 10:35 AM
Permission Set Groups Added To	Last Modified By: SURYAPRAKASH A, 8/29/2025, 10:38 AM
- 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
Visualforce Page Access	Permissions to execute Visualforce pages

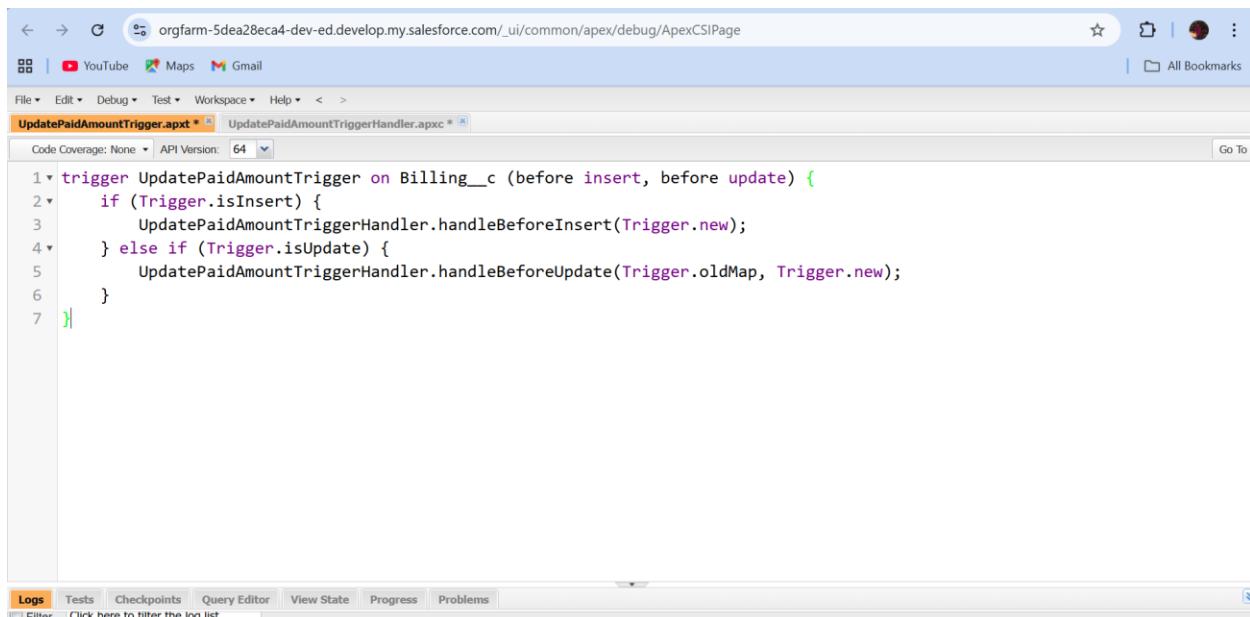
❖ Created Trigger Handler class:



The screenshot shows the Salesforce IDE interface with the code editor open. The file being edited is `UpdatePaidAmountTriggerHandler.apxc`. The code implements a trigger handler for the `Billing__c` object. It contains two static methods: `handleBeforeInsert` and `handleBeforeUpdate`. In `handleBeforeInsert`, it loops through a list of new `Billing__c` records and sets the `Paid_Amount__c` field to match the `Paying_Amount__c` field. In `handleBeforeUpdate`, it loops through a map of old and updated `Billing__c` records, calculates the difference between the `oldPaidAmount` and `newPaidAmount`, and updates the `Paid_Amount__c` field.

```
1 public class UpdatePaidAmountTriggerHandler {
2     public static void handleBeforeInsert(List<Billing__c> newBillings) {
3         for (Billing__c billing : newBillings) {
4             billing.Paid_Amount__c = billing.Paying_Amount__c;
5         }
6     }
7     public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap, List<Billing__c> updatedBillings) {
8         for (Billing__c billing : updatedBillings) {
9             Billing__c oldBilling = oldBillingsMap.get(billing.Id);
10            Decimal oldPaidAmount = oldBilling.Paid_Amount__c;
11            billing.Paid_Amount__c = oldPaidAmount + billing.Paying_Amount__c;
12        }
13    }
14 }
```

❖ Created the trigger:

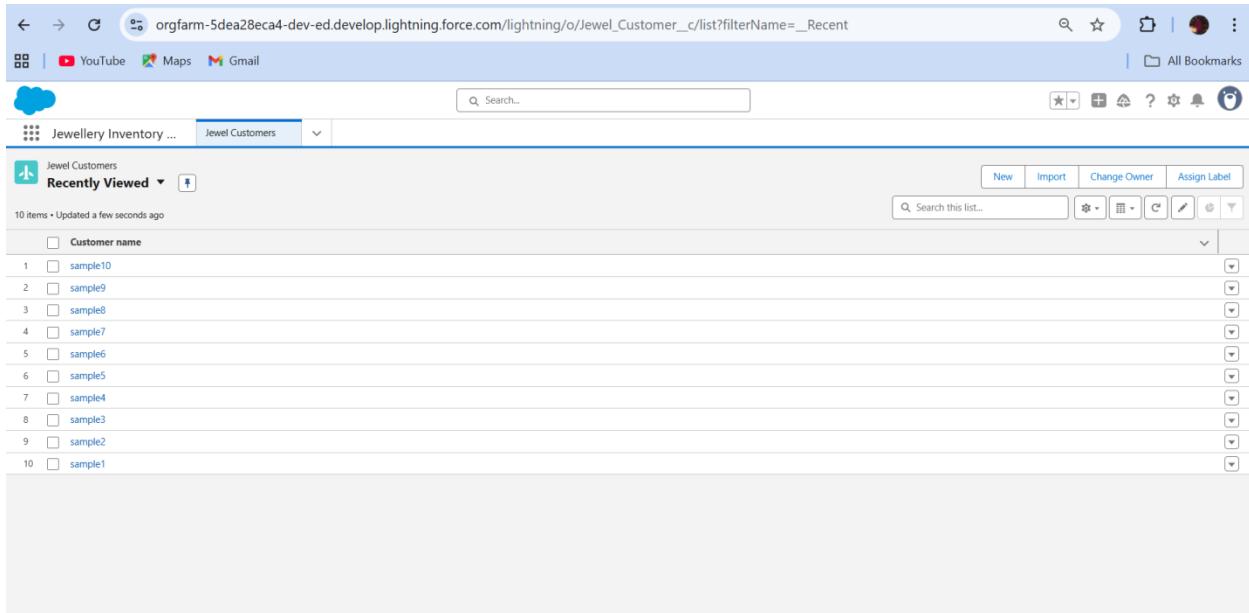


The screenshot shows the Salesforce IDE interface with the trigger definition file `UpdatePaidAmountTrigger.apxt` open. The trigger is named `UpdatePaidAmountTrigger` and is defined on the `Billing__c` object. It uses the `before insert` and `before update` events. The trigger logic calls the `handleBeforeInsert` and `handleBeforeUpdate` methods of the `UpdatePaidAmountTriggerHandler` class.

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

User Adoption

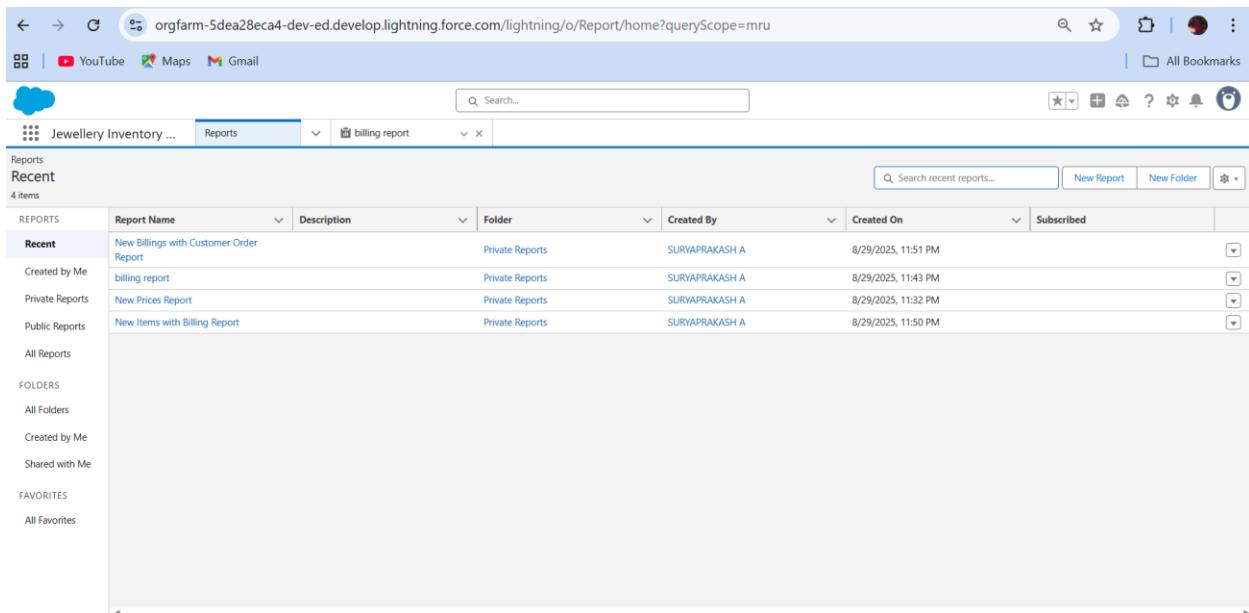
❖ Created Records:



The screenshot shows the 'Recently Viewed' section of the 'Jewel Customers' list. It displays 10 items, each with a checkbox and a sample name. The names are: sample10, sample9, sample8, sample7, sample6, sample5, sample4, sample3, sample2, and sample1.

Customer name
sample10
sample9
sample8
sample7
sample6
sample5
sample4
sample3
sample2
sample1

❖ Create Reports:



The screenshot shows the 'Recent' section of the 'Reports' list. It displays 4 items, each with a report name, description, folder, created by, and created on date. The reports are: New Billings with Customer Order Report, billing report, New Prices Report, and New Items with Billing Report.

Report Name	Description	Folder	Created By	Created On	Subscribed
New Billings with Customer Order Report		Private Reports	SURYAPRAKASH A	8/29/2025, 11:51 PM	
billing report		Private Reports	SURYAPRAKASH A	8/29/2025, 11:43 PM	
New Prices Report		Private Reports	SURYAPRAKASH A	8/29/2025, 11:32 PM	
New Items with Billing Report		Private Reports	SURYAPRAKASH A	8/29/2025, 11:50 PM	

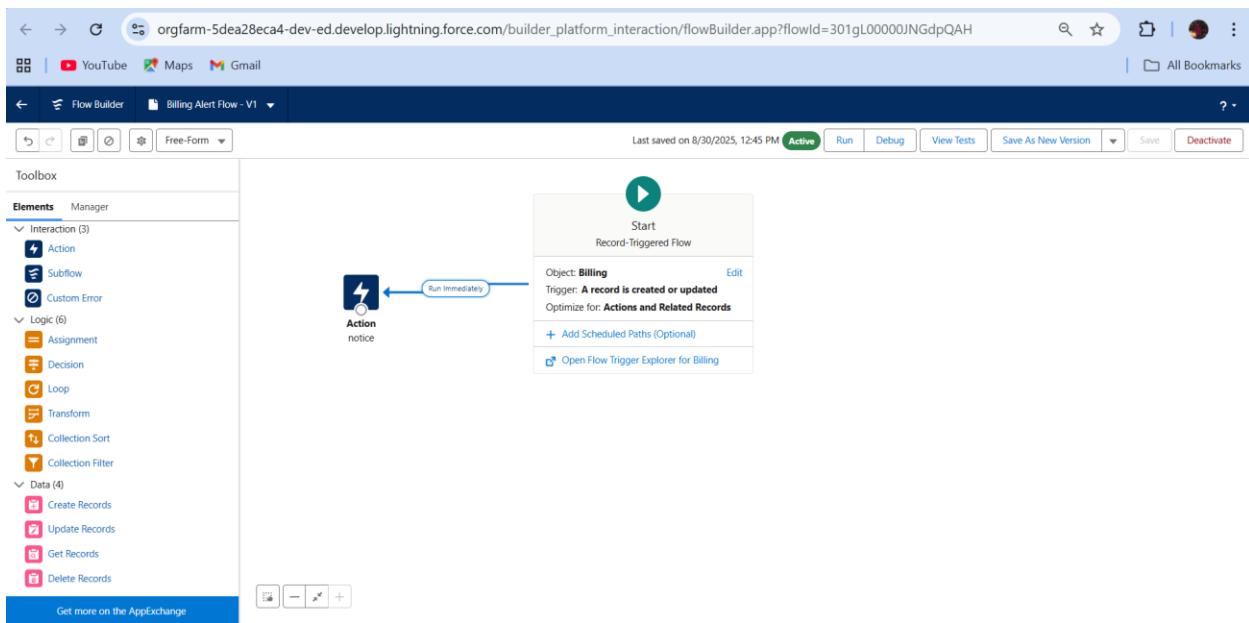
Jewellery Inventory ...		Reports	billing report	x
Report: Billings with Item				
Total Records		Total Gold/Silver Price		
10		\$6,943.64		
Billing: Billing Id	Item: Item Id	Gold/Silver Price		
1 Billing-07	Item-04	\$0.12		
2 Billing-08	Item-03	\$0.12		
3 Billing-09	Item-02	\$0.12		
4 Billing-10	Item-01	\$3,456.70		
5 Billing-06	Item-05	\$3,456.70		
6 Billing-05	Item-06	\$0.12		
7 Billing-03	Item-08	\$0.12		
8 Billing-01	Item-10	\$9.88		
9 Billing-02	Item-10	\$9.88		
10 Billing-04	Item-07	\$9.88		
11		\$6,943.64		

<https://orgfarm-5dea28eca4-dev-ed.develop.lightning.force.com/lightning/r/Report/00OgL000004cq05UAA/view?queryScope=userFolders>

❖ Created Dashboard:

Jewellery Inventory ...		Dashboards	Dashboard1	x																											
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<table border="1"> <thead> <tr> <th colspan="3">New Prices Report</th> </tr> <tr> <th>Price: Price Id</th> <th>Gold Price</th> <th>Silver Price</th> </tr> </thead> <tbody> <tr> <td>Price-01</td> <td>\$35k</td> <td>\$123.00000</td> </tr> <tr> <td>Price-02</td> <td>\$29k</td> <td>\$9,87600k</td> </tr> <tr> <td>Price-03</td> <td>\$234</td> <td>\$543.00000</td> </tr> <tr> <td>Price-04</td> <td>\$2k</td> <td>\$87,65400k</td> </tr> <tr> <td>Price-05</td> <td>\$877k</td> <td>\$23,49500k</td> </tr> <tr> <td>Price-06</td> <td>\$2M</td> <td>\$2,34500k</td> </tr> <tr> <td>Price-07</td> <td>\$235k</td> <td>\$9,87654M</td> </tr> </tbody> </table>					New Prices Report			Price: Price Id	Gold Price	Silver Price	Price-01	\$35k	\$123.00000	Price-02	\$29k	\$9,87600k	Price-03	\$234	\$543.00000	Price-04	\$2k	\$87,65400k	Price-05	\$877k	\$23,49500k	Price-06	\$2M	\$2,34500k	Price-07	\$235k	\$9,87654M
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View Report (New Prices Report)			As of Sep 6, 2025, 3:48 AM																												

❖ Created Flow:



CONCLUSION:

The CRM application for jewel management makes jewelry business tasks easier by bringing customer details, inventory, and sales into one system. It saves time, improves accuracy, helps understand business performance, and supports growth, making it a useful tool for the jewelry industry.

APPENDIX

❖ **Source Code:** Provided in Apex Classes and Triggers

UpdatePaidAmountTriggerHandler.apxc

```
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;  
        }  
    }  
}
```

UpdatePaidAmountTrigger.apxt

```
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);  
    }  
}
```