

CRM Application for Jewel Management

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Erode-638316.

College Code : bru17.

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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.



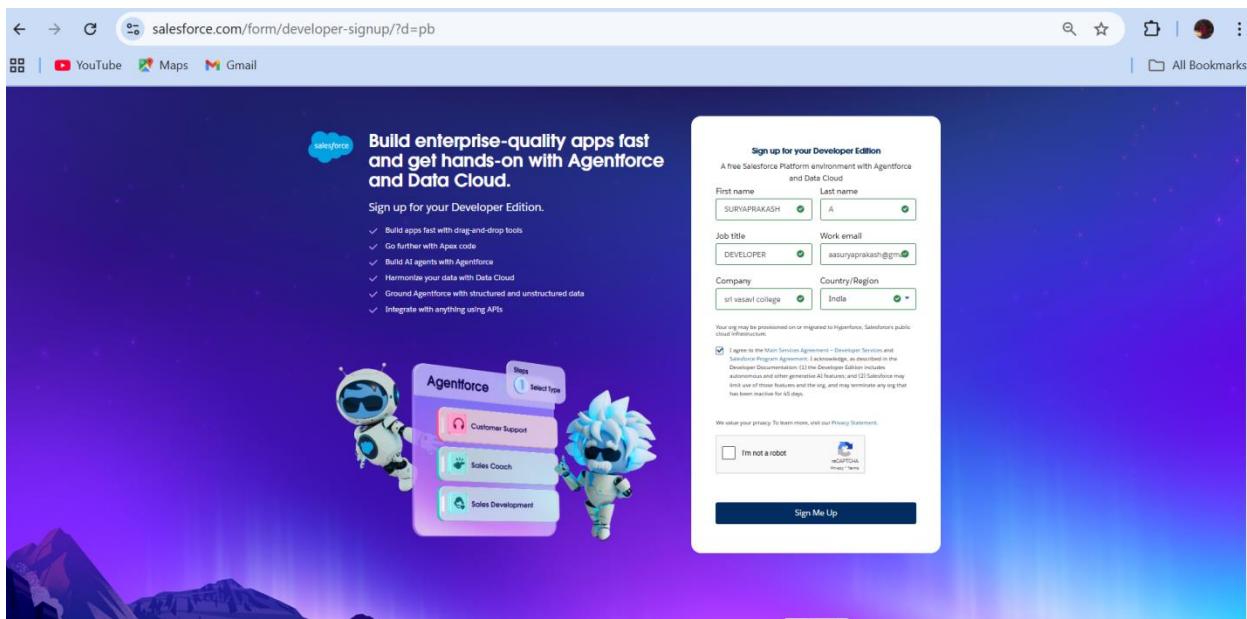
Purpose:

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.

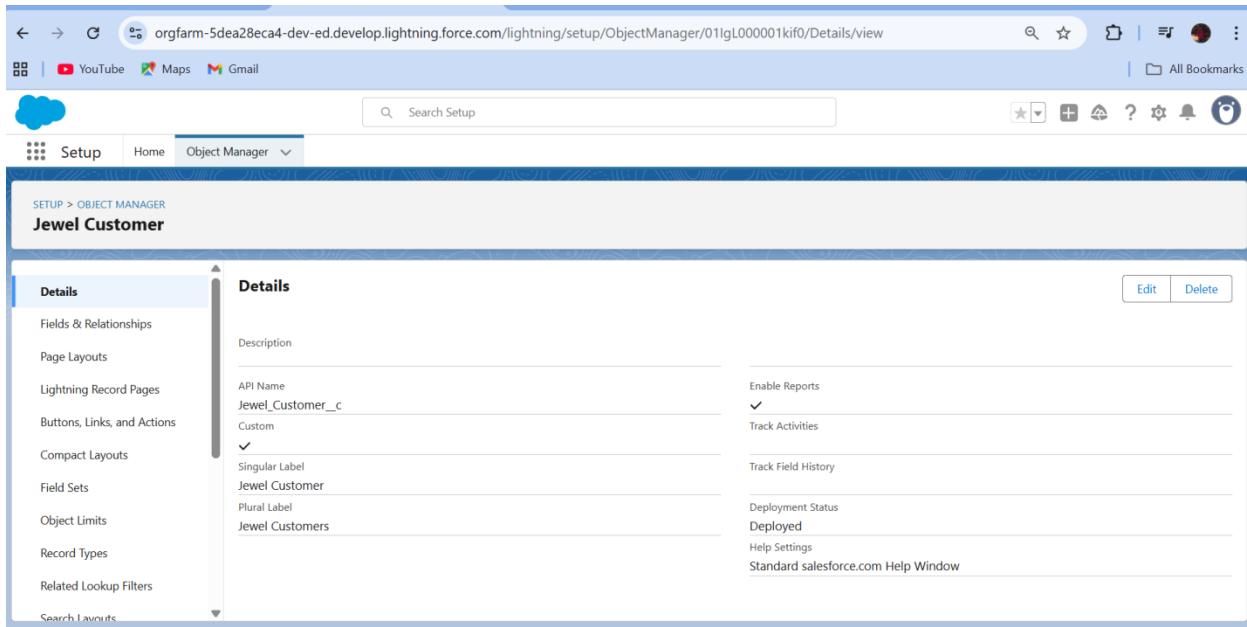
DEVELOPMENT PHASE

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
✓

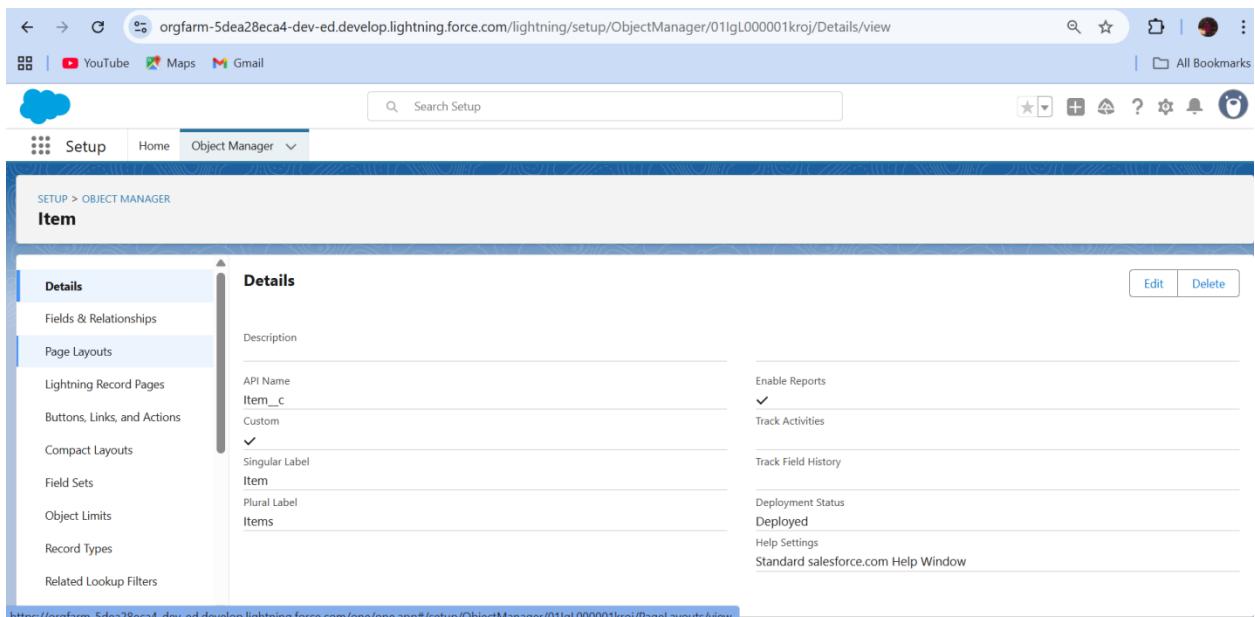
Track Activities

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
✓

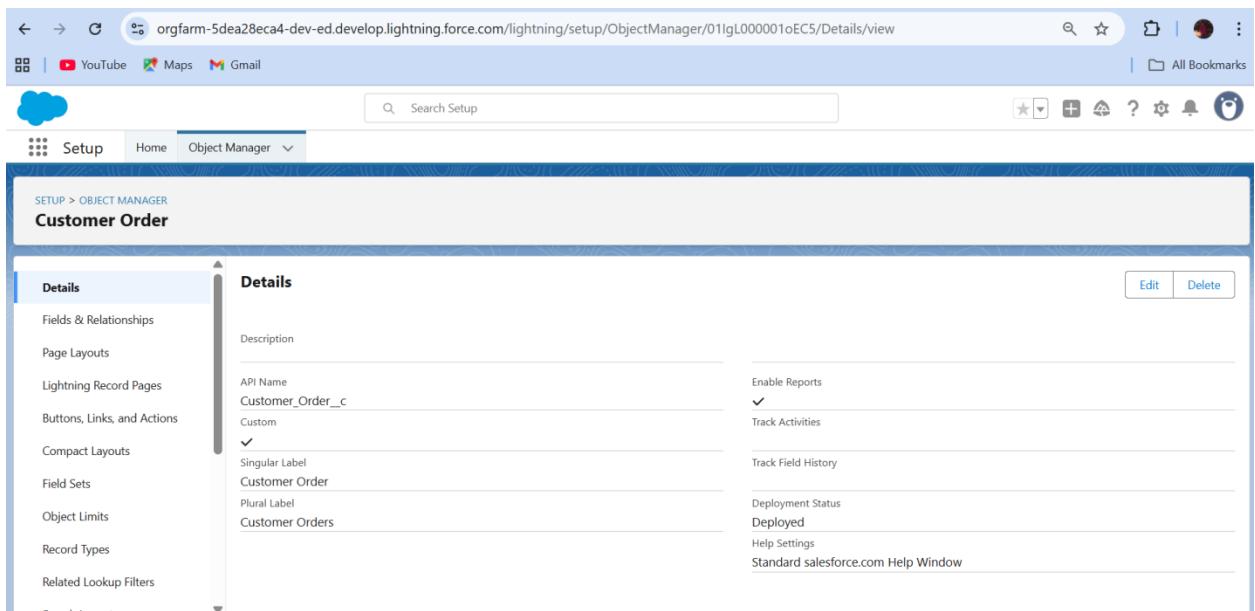
Track Activities

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

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

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 two lists allow items to be moved.

User Profiles

Choose the user profiles that can access this app.

Available Profiles

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Anypoint Integration
- Authenticated Website
- Authenticated Website
- B2B Reordering Portal Buyer Profile
- Contract Manager
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile
- Customer Community Login User

Selected Profiles

- System Administrator
- Gold Smith

❖ 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.

| Profile Detail | | Page Layouts | |
|----------------|----------------------------------|----------------------------|---|
| Name | Gold Smith | Global | Global Layout [View Assignment] |
| User License | Salesforce | Email Application | Macro Layout [View Assignment] |
| Description | | Home Page Layout | Object Milestone Layout [View Assignment] |
| Created By | SURYAPRAKASHA 8/29/2025, 9:43 AM | Account | Operating Hours Layout [View Assignment] |
| | | Alternative Payment Method | Opportunity Layout [View Assignment] |
| | | Annointment Invitation | 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

Profiles

Standard Platform User

Profile Standard Platform User

Didn't find what you're looking for? Try using Global Search.

Loans (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 | Standard Platform User | Custom Profile |
| User License | Salesforce Platform | Modified By |
| Created By | salesforce.com, Inc. 8/12/2025, 2:23 AM | |

Page Layouts

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

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

❖ Created Roles:

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

Setup Home Object Manager

Search Setup

Users Roles

Roles

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy

View other sample Role Hierarchies: Territory-based Sample

The diagram illustrates a role hierarchy:

- Executive Staff**: View & edit data, roll up forecasts, & generate reports for all users below.
- CEO, President, CFO, VP Sales**: View & edit data, roll up forecasts, & generate reports for all users below.
- International Sales Director**: View & edit data, roll up forecasts, & generate reports for all users below.
- Western Sales Director**: View & edit data, roll up forecasts, & generate reports for all users below.
- Eastern Sales Director**: View & edit data, roll up forecasts, & generate reports for all users below.
- Western Sales Rep, OR Sales Rep**: View & edit data, roll up forecasts, & generate reports only for own data.
- Eastern Sales Rep, NY Sales Rep, MA Sales Rep**: View & edit data, roll up forecasts, & generate reports only for own data.
- International Sales Rep, Asian Sales Rep, European Sales Rep**: View & edit data, roll up forecasts, & generate reports only for own data.

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 'User Management Settings' 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 left sidebar is open, showing navigation categories like Users, Apps, Feature Settings, and Data.com. The main content area displays the 'User Detail' page for a user named 'Kol Mikaelson'. The user's details include Name (Kol Mikaelson), Alias (kmika), Email (surya@gmail.com [Verified]), Username (surya78@salesforce.com), Nickname (User1756486961473986052), Title (User), Company (None), Department (None), Division (None), Address (None), Time Zone (GMT-07:00 Pacific Daylight Time (America/Los_Angeles)), Locale (English (United States)), Language (English), Delegated Approver (Manager), Receive Approval Request Emails (Only if I am an approver), Federation ID (None), and Service Cloud User (None). The 'Role' is set to 'Worker' and 'User License' is 'Salesforce Platform'. Other checkboxes for various user types like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type (View), Accessibility Mode (Classic Only), Debug Mode, and High-Contrast Palette on Charts are present but not checked.

❖ 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 left sidebar is open, showing categories like Details, Fields & Relationships, Page Layouts (which is selected), 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 displays a table titled 'Page Layouts' with 3 items, sorted by Page Layout Name. The table has columns for PAGE LAYOUT NAME, CREATED BY, and MODIFIED BY. The data is as follows:

| PAGE LAYOUT NAME | CREATED BY | MODIFIED BY |
|------------------------|-------------------------------------|-------------------------------------|
| Item Layout | SURYAPRAKASH A, 8/26/2025, 6:12 AM | SURYAPRAKASH A, 8/29/2025, 11:48 PM |
| Page Layout for Gold | SURYAPRAKASH A, 8/29/2025, 10:11 AM | SURYAPRAKASH A, 8/29/2025, 11:48 PM |
| Page Layout for Silver | SURYAPRAKASH A, 8/29/2025, 10:21 AM | SURYAPRAKASH A, 8/29/2025, 11:48 PM |

❖ 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
- Top Bar:** YouTube, Maps, Gmail, All Bookmarks
- Header:** Search Setup, 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:

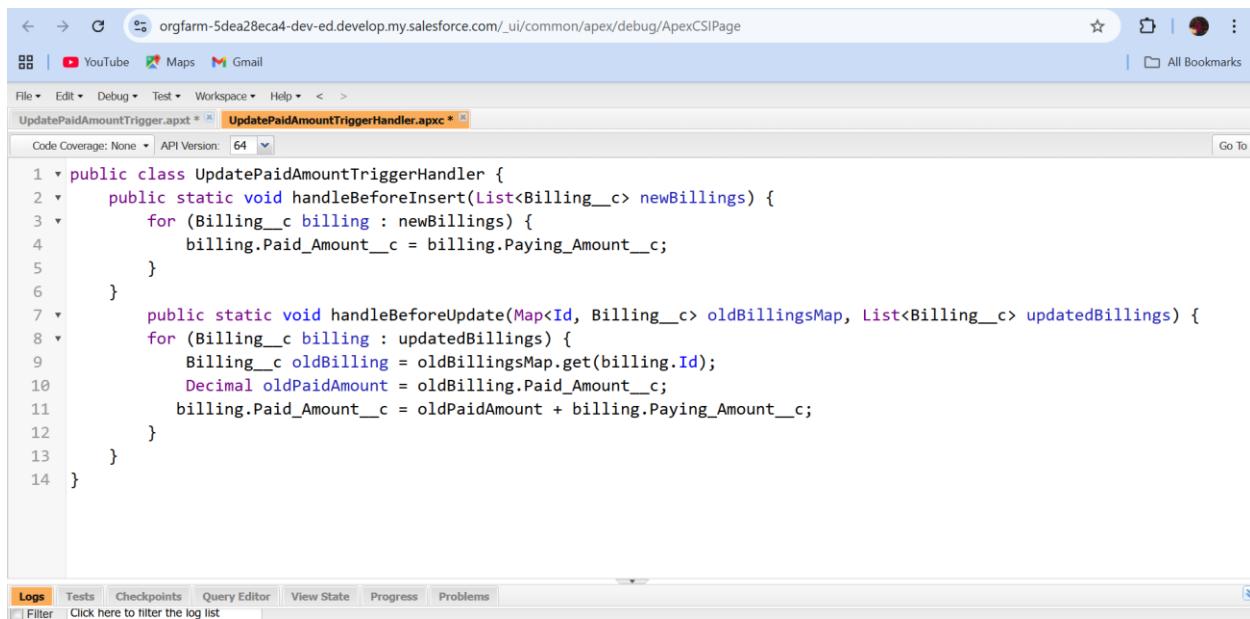
The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** orgfarm-5dea28eca4-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PSgL0000066IGZ
- Top Bar:** YouTube, Maps, Gmail, All Bookmarks
- Header:** Search Setup, 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:

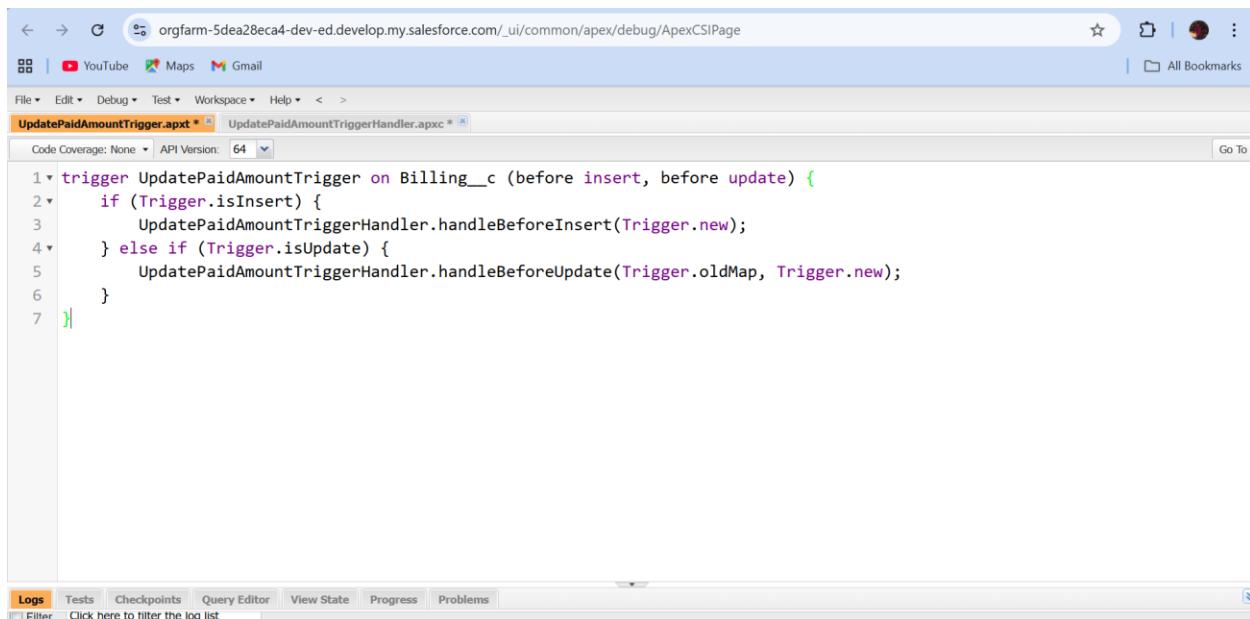


The screenshot shows the Salesforce Apex code editor interface. The title bar indicates the URL is orgfarm-5dea28eca4-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The tabs at the top show 'UpdatePaidAmountTrigger.apxt' and 'UpdatePaidAmountTriggerHandler.apxc'. The code editor displays the following Apex class:

```
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 }
```

Below the code editor, there is a navigation bar with tabs: Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The 'Logs' tab is currently selected.

❖ Created the trigger:



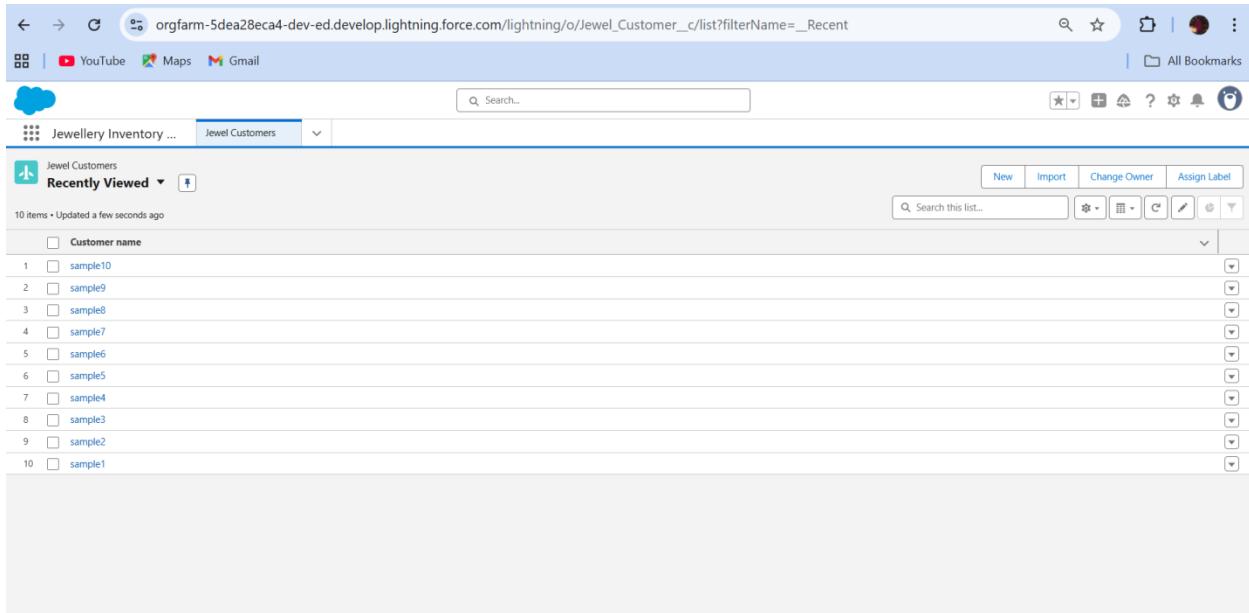
The screenshot shows the Salesforce Apex code editor interface. The title bar indicates the URL is orgfarm-5dea28eca4-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The tabs at the top show 'UpdatePaidAmountTrigger.apxt' and 'UpdatePaidAmountTriggerHandler.apxc'. The code editor displays the following trigger definition:

```
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 }
```

Below the code editor, there is a navigation bar with tabs: Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The 'Logs' tab is currently selected.

User Adoption

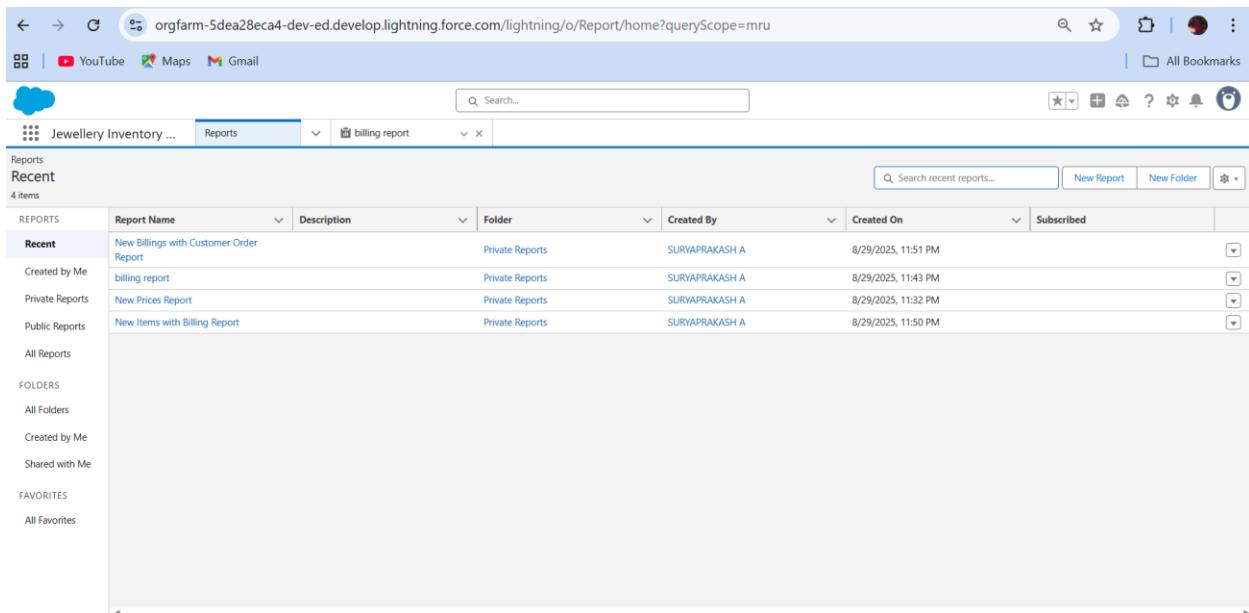
❖ Created Records:



The screenshot shows a Lightning Record List for 'Jewel Customers'. The title bar indicates the URL is orgfarm-5dea28eca4-dev-ed.lightning.force.com/lightning/o/Jewel_Customer__c/list?filterName=_Recent. The page header includes a search bar and various navigation icons. The main content area displays a table titled 'Recently Viewed' with 10 items. The columns are 'Customer name' and a checkbox column. The items listed are sample1 through sample10.

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

❖ Create Reports:



The screenshot shows a Lightning Report List. The title bar indicates the URL is orgfarm-5dea28eca4-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=mr. The page header includes a search bar and various navigation icons. The main content area displays a table titled 'Recent' with 4 items. The columns are 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. The items listed 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 | | |

The screenshot shows a Salesforce Lightning report titled "billing report". The report displays 10 total records with a total Gold/Silver Price of \$6,943.64. The table includes columns for Billing ID, Item ID, and Gold/Silver Price. The data is as follows:

| | Billing ID | 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:

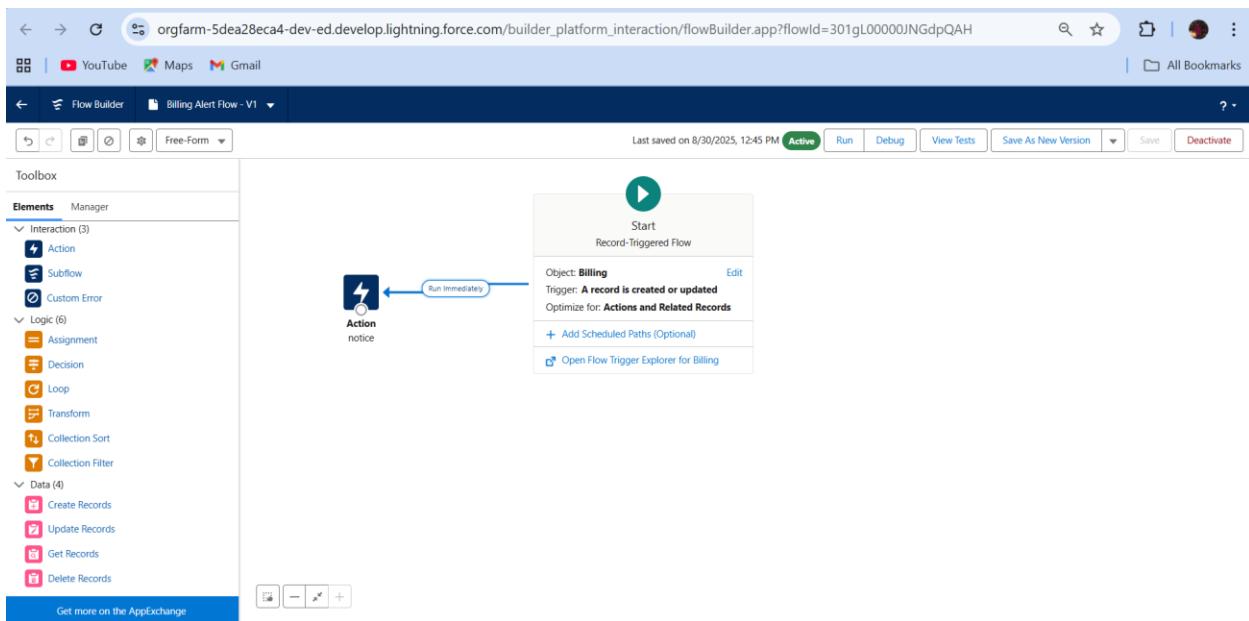
The screenshot shows a Salesforce Lightning dashboard titled "Dashboard1". The dashboard displays a report titled "New Prices Report" with 7 total records. The table includes columns for Price ID, Gold Price, and Silver Price. The data is as follows:

| 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 |

As of Sep 6, 2025, 3:48 AM Viewing as SURYAPRAKASH A

<https://orgfarm-5dea28eca4-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01Zgl000003XFL7UAO/view?queryScope=userFolders>

❖ 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);  
    }  
}
```