

PROJECT TITLE: CRM APPLICATION FOR JEWEL MANAGEMENT

COLLEGE NAME : KATHIR COLLEGE OF ARTS AND SCIENCE

COLLEGE CODE : bruah

NAAN MUDHALVAN ID : NM2025TMID24401

TEAM MEMBERS :

TEAM LEADER : SURYA . B
EMAIL : bsurya2114@gmail.com

TEAM MEMBER : KESAVAN R.P
EMAIL : kesavansujith9@gmail.com

TEAM MEMBER : DIVAKAR.V
EMAIL : divadivakar129@gmail.com

TEAM MEMBER : NANDHAKUMAR
EMAIL : nandhukcaas@gmail.com



1. INTRODUCTION

1.1 Project overview

CRM application for a jewelry management project aims to improve customer relationships, streamline sales and marketing processes, and centralize customer data to foster growth. It includes managing customer profiles, tracking purchase history, enabling personalized communication, and analyzing customer behavior to offer purpose-tailored recommendations and conduct targeted marketing campaigns. By centralizing information and automating tasks, a jewelry CRM enhances customer satisfaction, drives loyalty, and provides valuable insights for better business decisions and increased sales.

1.2 Purpose

The main purpose of the project is to:

Gathers data on preferences, buying history, and behaviors to personalize outreach and improve satisfaction.

Tracks inquiries and sales leads, automates follow-ups, and enables personalized marketing campaigns based on customer data.

Analyzes sales data to identify top-selling and slow-moving items, helping to optimize stock levels.



2.DEVELOPMENT PHASE

Creating Developer Account

The project was developed on salesforce developer org, created via:

<https://developer.salesforce.com/signup>

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

Sign up for your Developer Edition.

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



Sign up for your Developer Edition

A free Salesforce Platform environment with Agentforce and Data Cloud

First name

Last name

Job title

Work email

Company

Country/Region

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

I agree to the [Main Services Agreement – Developer Services](#) and [Salesforce Program Agreement](#). I acknowledge, as described in the [Developer Documentation](#): (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, 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

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

Header: elop.lightning.force.com

Setup Bar: Home, Object Manager (selected), +, 4, :

Search Bar: Search Setup

Breadcrumbs: SETUP > OBJECT MANAGER

Object Name: Jewel Customer

Details Panel:

| Details | |
|------------------------------|-------------------------------------|
| Fields & Relationships | Description |
| Page Layouts | |
| Lightning Record Pages | API Name Jewel_Customer__c |
| Buttons, Links, and Actions | Enable Reports ✓ |
| Compact Layouts | Custom ✓ |
| Field Sets | Singular Label Jewel Customer |
| Object Limits | Plural Label Jewel Customers |
| Record Types | Deployment Status Deployed |
| Related Lookup Filters | Help Settings |
| Search Layouts | Standard salesforce.com Help Window |
| List View Button Layout | |
| Restriction Rules | |
| Scoping Rules | |
| Object Access | |
| Triggers | |
| Flow Triggers | |
| Validation Rules | |
| Conditional Field Formatting | |

Left Sidebar:

- 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
- Object Access
- Triggers
- Flow Triggers
- Validation Rules
- Conditional Field Formatting

Custom Tabs – Custom object look and behave like the standard tabs provided with salesforce.

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

Header: elop.lightning.force.com

Top Bar: Includes a house icon, a search bar with "Search Setup", and various navigation icons.

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
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers
- Validation Rules
- Conditional Field Formatting

Right Panel (Details):

| Details | |
|---------------------|-------------------------------------|
| Description | |
| API Name | Item__c |
| Custom | <input checked="" type="checkbox"/> |
| Singular Label | Item |
| Plural Label | Items |
| Enable Reports | <input checked="" type="checkbox"/> |
| Track Activities | |
| Track Field History | |
| Deployment Status | Deployed |
| Help Settings | Standard salesforce.com Help Window |

Buttons: Edit | Delete

Fields validation rules – Creating the validation rules for postal code field in jewel customer object.

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

Header: elop.lightning.force.com

Top Bar: Includes icons for Home, Search, and Notifications.

Navigation: Setup > Object Manager > Jewel Customer

Left Sidebar (Validation Rules):

- 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
- Object Access
- Triggers
- Flow Triggers
- Validation Rules** (selected)
- Conditional Field Formatting

Validation Rule Detail:

| Validation Rule Detail | |
|-------------------------|---|
| Rule Name | Postal_Code |
| Active | <input checked="" type="checkbox"/> |
| Error Condition Formula | AND(OR(LEN(Zip_Postal_code_c) <> 6, NOT(REGEX(Zip_Postal_code_c, "[0-9]{6}"))), NOT(ISBLANK(Zip_Postal_code_c)))) |
| Error Message | Must contain 6 digits", select the Error location Error Location Top of Page as Field and select the field as "Zip/Postal code |
| Description | |
| Created By | Renuga sri R, 8/31/2025, 3:07 AM |
| Modified By | Renuga sri R, 8/31/2025, 3:07 AM |

Roles for gold smith - A Role is user visibility access at the record level.

Gold – Expand all and click on add role.



elop.lightning.force.com



5



Search Setup

Setup

Home

Object Manager

Q Roles

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

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

SETUP
Roles

Creating the Role Hierarchy

Help for this Page

You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.

Your Organization's Role Hierarchy

Show in tree view

[Collapse All](#) [Expand All](#)

TheSmartbridge

- [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](#)
 - [Worker](#) [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - [SVP, Customer Service & Support](#) [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - [Customer Support, International](#) [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - [Customer Support, North America](#) [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - [Installation & Repair Services](#) [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - [SVP, Human Resources](#) [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - [SVP, Sales & Marketing](#) [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - [VP, International Sales](#) [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - [VP, Marketing](#) [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - [Marketing Team](#) [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - [VP, North American Sales](#) [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - [Director, Channel Sales](#) [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - [Channel Sales Team](#) [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - [Director, Direct Sales](#) [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - [Eastern Sales Team](#) [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - [Western Sales Team](#) [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)

Users – To create two more user in same profile.

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

- Page Address:** elop.lightning.force.com
- Page Title:** SETUP Users
- Section:** All Users
- Table Headers:** Action, Full Name, Alias, Username, Role, Active, Profile
- Table Data:**

| Action | Full Name | Alias | Username | Role | Active | Profile |
|----------------------|--------------------|---------|---|------------|-------------------------------------|----------------------------------|
| Edit | Chatter Expert | Chatter | chatty.00dg 000009xqefua2.xc92e7qw7q6v@chatter.salesforce.com | | <input checked="" type="checkbox"/> | Chatter Expert User |
| Edit | EPIC, OrgFarm | QEPIC | epic.ce436a7388ae@orgfarm.salesforce.com | | <input checked="" type="checkbox"/> | System Administrator |
| Edit | Mikaelson, Kol | kmika | renuga@renu.com | Worker | <input checked="" type="checkbox"/> | Worker profiles |
| Edit | Mikaelson, Niklaus | nmika | renu@renu.com | Gold Smith | <input checked="" type="checkbox"/> | Gold Smith |
| Edit | R_Renuga.sri | ren | renugasri900443@agentforce.com | | <input checked="" type="checkbox"/> | System Administrator |
| Edit | User, Integration | integ | integration@00dg 000009xqefua2.com | | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| Edit | User, Security | sec | insightssecurity@00dg 000009xqefua2.com | | <input checked="" type="checkbox"/> | Analytics Cloud Security U |

Page layout for gold and silver – A Page layout us to allow customise design and organise detail and edit page of records.

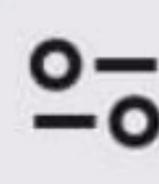
Gold – Click the object manager in page layout, to create the gold page layout.

Silver – Like same procedure the silver page layout also.

The screenshot shows the Salesforce Setup interface for the 'Item' object. The left sidebar contains a list of setup categories: 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, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, and Conditional Field Formatting. The main area is titled 'Page Layouts' and shows three items: 'Item Layout' created by Renuga sri R on 8/31/2025 at 1:53 AM, 'Page Layout for Gold' created by Renuga sri R on 9/1/2025 at 6:48 AM, and 'Page Layout for Silver' created by Renuga sri R on 9/1/2025 at 6:59 AM. There are also 'Quick Find', 'New', and 'Page Layout Assignment' buttons.

| PAGE LAYOUT NAME... | CREATED BY | MODIFIED BY |
|------------------------|----------------------------------|-----------------------------------|
| Item Layout | Renuga sri R, 8/31/2025, 1:53 AM | Renuga sri R, 8/31/2025, 11:13 PM |
| Page Layout for Gold | Renuga sri R, 9/1/2025, 6:48 AM | Renuga sri R, 9/1/2025, 6:53 AM |
| Page Layout for Silver | Renuga sri R, 9/1/2025, 6:59 AM | Renuga sri R, 9/1/2025, 7:01 AM |

Record Types – Record types are a way of grouping many records of one type for that object. Record types allow administrators to create a different page layout with custom picklist fields and values for the same business process and various business process.



elop.lightning.force.com



Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Record Types

2 Items, Sorted by Record Type Label

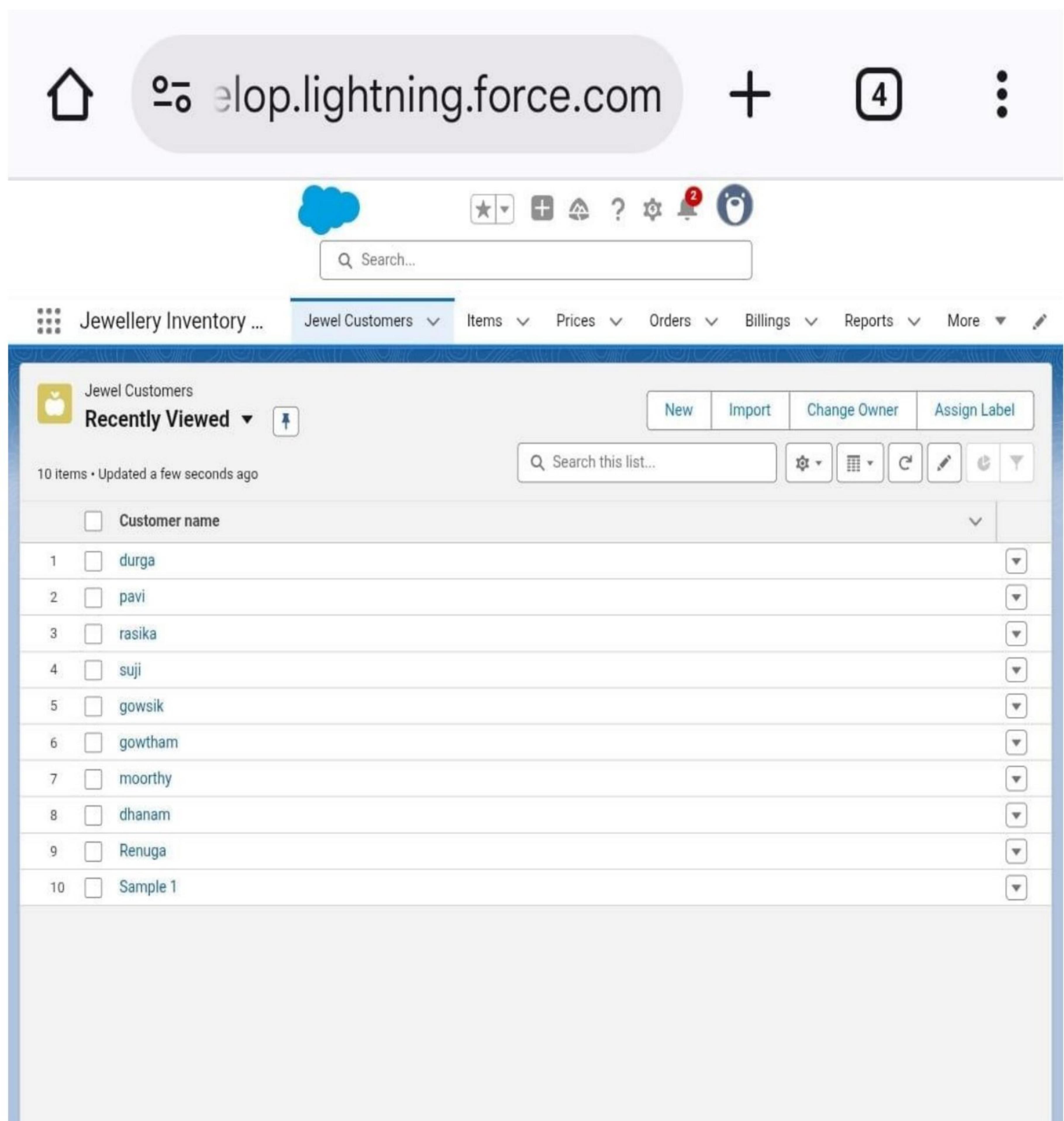
Quick Find

New

Page Layout Assignment

| RECORD TYPE LABEL | DESCRIPTION | ACTIVE | MODIFIED BY |
|-------------------|--------------------------|--------|---------------------------------|
| Gold | Gold items information | ✓ | Renuga sri R, 9/1/2025, 7:09 AM |
| Silver | Silver items information | ✓ | Renuga sri R, 9/1/2025, 7:12 AM |

User Adoption – you perform user management tasks like creating and editing users, resetting passwords, granting permissions, configuration data access and much more.



3. IMPLEMENTATION

Profiles – A Profile is a group of setting and permission that define what a user can do. Profile controls “object permission, field permission, user permission, tab setting, app setting, apex class access, page layout, record types”.

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

- Header:** The URL is elop.lightning.force.com. There are tabs for Home and Object Manager, and a search bar labeled "Search Setup".
- Left Sidebar:** A navigation menu with "Profiles" selected under "Users". A message says, "Didn't find what you're looking for? Try using Global Search."
- Central Content:** The title is "SETUP Profiles". It shows a table of user profiles with columns: Action, Profile Name, User License, and Custom. The table lists various profiles like Analytics Cloud Integration User, Analytics Cloud Security User, and several Chatter and Customer Community profiles.

The lightning app – It is used to create a CRM Application for jewel management, which show as a dashboard in that it allows us to provide the data, reports, etc....,

The screenshot shows the Salesforce Setup interface with the 'App manager' search bar. Under 'Apps', the 'External Client Apps' section is expanded, and 'External Client App Manager' is selected. The main content area is titled 'Lightning Experience App Manager' and displays a table of 27 items. The table columns are: App Name, Developer N..., Description, Last Modifie..., App ..., and Vi... . The table rows list various apps like All Tabs, Analytics Studio, App Launcher, Approvals, Automation, Bolt Solutions, Community, Content, Data Cloud, Data Manager, Digital Experien..., Jewellery Inven..., Lightning Usag..., Marketing CRM..., My Service Jou..., Platform, Queue Manage..., Sales, Sales, Sales Cloud Mo..., Sales Console, Salesforce Cha..., Salesforce Sch..., Service, Service Console, Site.com, and Subscription M... . Most apps are listed as 'Lightning' type, except for a few like All Tabs, App Launcher, and Service which are 'Classic'.

| | App Name | Developer N... | Description | Last Modifie... | App ... | Vi... |
|----|---------------------|--------------------|---------------------|-------------------|-----------|-------|
| 1 | All Tabs | AllTabSet | | 8/24/2025, 2:2... | Classic | ▼ |
| 2 | Analytics Studio | Insights | Build CRM Anal... | 8/24/2025, 2:2... | Classic | ✓ |
| 3 | App Launcher | AppLauncher | App Launcher t... | 8/24/2025, 2:2... | Classic | ✓ |
| 4 | Approvals | Approvals | Manage appro... | 8/24/2025, 2:2... | Lightning | ✓ |
| 5 | Automation | FlowsApp | Automate busi... | 8/24/2025, 2:2... | Lightning | ✓ |
| 6 | Bolt Solutions | LightningBolt | Discover and ... | 8/24/2025, 2:2... | Lightning | ✓ |
| 7 | Community | Community | Salesforce CR... | 8/24/2025, 2:2... | Classic | ✓ |
| 8 | Content | Content | Salesforce CR... | 8/24/2025, 2:2... | Classic | ✓ |
| 9 | Data Cloud | Audience360 | Build a thoroug... | 8/24/2025, 2:2... | Lightning | ✓ |
| 10 | Data Manager | DataManager | Use Data Mana... | 8/24/2025, 2:2... | Lightning | ✓ |
| 11 | Digital Experien... | SalesforceCMS | Manage conte... | 8/24/2025, 2:2... | Lightning | ✓ |
| 12 | Jewellery Inven... | Jewellery_Inve... | Elevate your lo... | 8/31/2025, 2:2... | Lightning | ✓ |
| 13 | Lightning Usag... | LightningInstru... | View Adoption ... | 8/24/2025, 2:2... | Lightning | ✓ |
| 14 | Marketing CRM... | Marketing | Track sales an... | 8/24/2025, 2:2... | Classic | ✓ |
| 15 | My Service Jou... | MSJApp | Discover new c... | 8/24/2025, 2:2... | Lightning | ✓ |
| 16 | Platform | Platform | The fundament... | 8/24/2025, 2:2... | Classic | ▼ |
| 17 | Queue Manage... | QueueManage... | Create and ma... | 8/24/2025, 2:2... | Lightning | ✓ |
| 18 | Sales | Sales | The world's mo... | 8/24/2025, 2:2... | Classic | ▼ |
| 19 | Sales | LightningSales | Manage your s... | 8/24/2025, 2:2... | Lightning | ✓ |
| 20 | Sales Cloud Mo... | SalesCloudMob... | New seller foc... | 8/24/2025, 2:2... | Lightning | ✓ |
| 21 | Sales Console | LightningSales... | (Lightning Exp... | 8/24/2025, 2:2... | Lightning | ✓ |
| 22 | Salesforce Cha... | Chatter | The Salesforce... | 8/24/2025, 2:2... | Classic | ✓ |
| 23 | Salesforce Sch... | LightningSched... | Set up persona... | 8/24/2025, 2:2... | Lightning | ✓ |
| 24 | Service | Service | Manage custo... | 8/24/2025, 2:2... | Classic | ✓ |
| 25 | Service Console | LightningService | (Lightning Exp... | 8/24/2025, 2:2... | Lightning | ✓ |
| 26 | Site.com | Sites | Build pixel-perf... | 8/24/2025, 2:2... | Classic | ▼ |
| 27 | Subscription M... | RevenueCloudC... | Get started aut... | 8/24/2025, 2:2... | Lightning | ✓ |

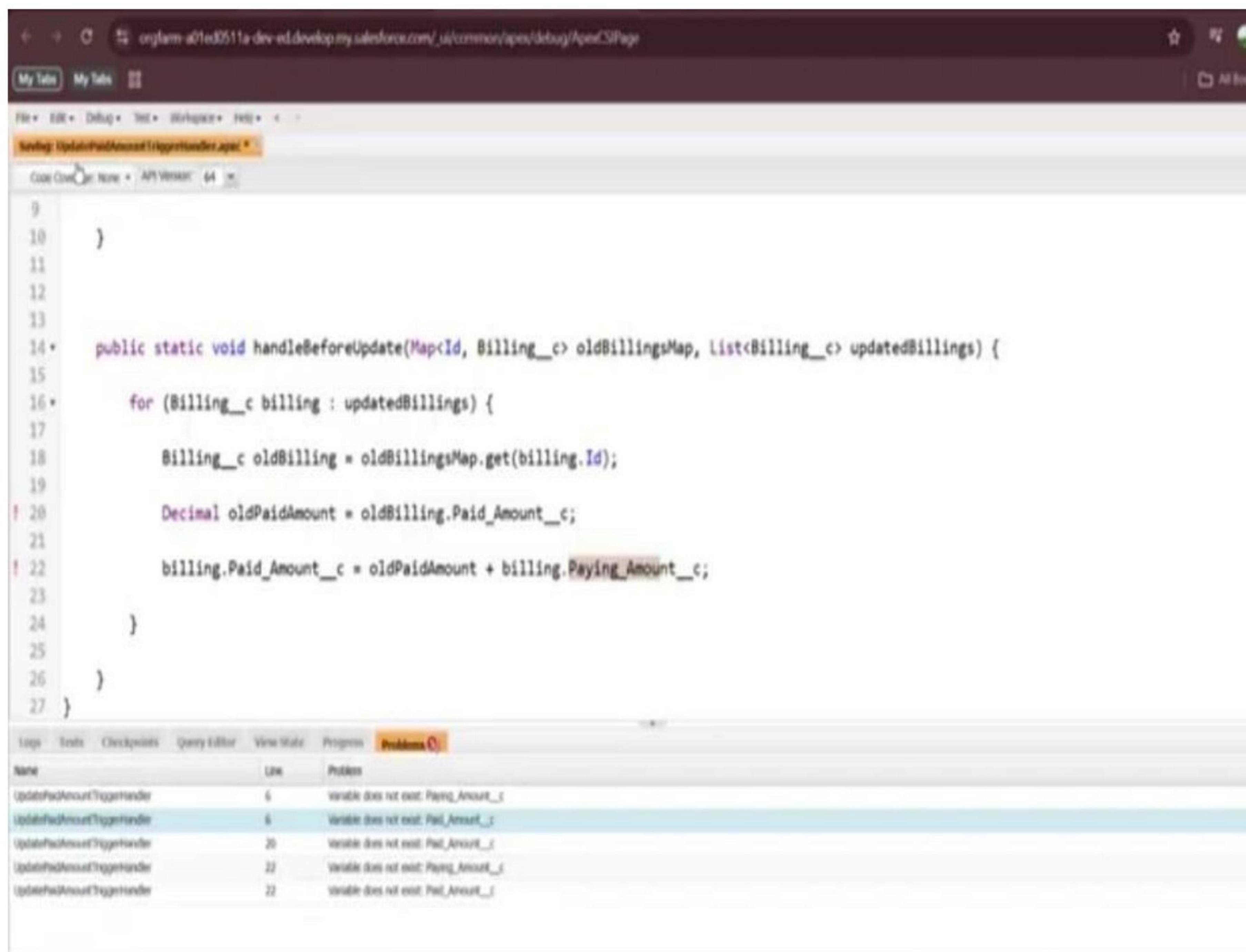
Text field: A Text field is used whenever you need to capture describe or alphanumeric details that identify, describe, or provide context about jewel items, supplier, or transaction.

Apex class – auto calculate total cost from order items.



```
Code Coverage: None | API Version: 44.0
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
8     public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap, List<Billing__c> updatedBillings) {
9         for (Billing__c billing : updatedBillings) {
10            Billing__c oldBilling = oldBillingsMap.get(billing.Id);
11
12            billing.Paid_Amount__c = oldBilling.Paid_Amount__c;
13
14            billing.Paid_Amount__c = oldBilling.Paid_Amount__c + billing.Paying_Amount__c;
15        }
16    }
17 }
```

Apex trigger – auto calculate total cost from order item.



```
Saving: UpdatePaidAmountTriggerHandler.apotr
Code Coverage: None | API Version: 44.0
9
10    }
11
12
13
14    public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap, List<Billing__c> updatedBillings) {
15
16        for (Billing__c billing : updatedBillings) {
17
18            Billing__c oldBilling = oldBillingsMap.get(billing.Id);
19
20            Decimal oldPaidAmount = oldBilling.Paid_Amount__c;
21
22            billing.Paid_Amount__c = oldPaidAmount + billing.Paying_Amount__c;
23
24        }
25
26    }
27 }
```

| Name | Line | Problem |
|--------------------------------|------|---|
| UpdatePaidAmountTriggerHandler | 6 | Variable does not exist: Paying_Amount__c |
| UpdatePaidAmountTriggerHandler | 6 | Variable does not exist: Paid_Amount__c |
| UpdatePaidAmountTriggerHandler | 20 | Variable does not exist: Paid_Amount__c |
| UpdatePaidAmountTriggerHandler | 22 | Variable does not exist: Paying_Amount__c |
| UpdatePaidAmountTriggerHandler | 22 | Variable does not exist: Paid_Amount__c |

Error handling: Resolved the issues “paying amount”, “paid amount” not found in the field, so create these fields.

The screenshot shows the Salesforce Developer Console interface. The URL in the address bar is `orgId=00ted0511a dev-ed-develop.my.salesforce.com/u/common/apex/debug/ApexCIPage`. The title bar includes tabs for "My Tabs" and "My Sites". The menu bar has options like "File", "Edit", "Debug", "Test", "Workplace", "Help", and "All Bookmarks". The main area displays an Apex class named `UpdatePaidAmountTriggerHandler.apex`. The code implements an aggregate trigger handler for the `Billing` object. It uses a map to store old billings by ID and iterates through updated billings to calculate the total paid amount. The code is annotated with line numbers from 9 to 27. Below the code editor, there are tabs for "Logs", "Tests", "Checkpoints", "Query Editor", "View State", "Progress", and "Problems", with "Problems" being the active tab. The status bar at the bottom shows "None", "Line", and "Print".

```
9
10 }
11
12
13
14 * public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap, List<Billing__c> updatedBillings) {
15 *
16     for (Billing__c billing : updatedBillings) {
17
18         Billing__c oldBilling = oldBillingsMap.get(billing.Id);
19
20         Decimal oldPaidAmount = oldBilling.Paid_Amount__c;
21
22         billing.Paid_Amount__c = oldPaidAmount + billing.Paying_Amount__c;
23
24     }
25
26 }
27 }
```

Result

Output screenshots to be inserted.

Permission sets: Permission sets in CRM Application for jewel management are used to give additional access to users to users without changing their profile. They allow specific staff to perform extra tasks like updating stock, purchase order, or viewing reports when needed.

Flows: flows in CRM Application for jewel management system are used to automate processes like updating stock after a purchase order, sending alerts for low inventory or expired stocks, and reducing manual work to improve accuracy and efficiency.



elop.lightning.force.com



Search Setup

Setup

Home

Object Manager

Permission set

Users

Permission Set Groups

Permission Sets

SETUP

Permission Sets

Permission Sets

Help for this Page

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

All Permission Sets

Edit | Delete | Create New View



New



A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

| Action | Permission Set Name | Description | License |
|--------------------------------|---|---|-------------------------------------|
| <input type="checkbox"/> Clone | (Legacy) Data Cloud Data Aware Spec... | This Data Cloud permission set will b... | Customer Data Platform |
| <input type="checkbox"/> Clone | (Legacy) Data Cloud Marketing Admin | Allows access to Data Cloud Setup if ... | Customer Data Cloud for Marketin... |
| <input type="checkbox"/> Clone | (Legacy) Data Cloud Marketing Mana... | This Data Cloud permission set will b... | Customer Data Platform |
| <input type="checkbox"/> Clone | (Legacy) Data Cloud Marketing Speci... | This Data Cloud permission set will b... | Customer Data Platform |
| <input type="checkbox"/> Clone | (Legacy) Data Cloud for Marketing Da... | This Data Cloud permission set will b... | Customer Data Cloud for Marketin... |
| <input type="checkbox"/> Clone | (Legacy) Data Cloud for Marketing M... | This Data Cloud permission set will b... | Customer Data Cloud for Marketin... |
| <input type="checkbox"/> Clone | (Legacy) Data Cloud for Marketing Sp... | This Data Cloud permission set will b... | Customer Data Cloud for Marketin... |
| <input type="checkbox"/> Clone | Access Agentforce Default Agent | Gives users access to the default Age... | Agentforce (Default) |
| <input type="checkbox"/> Clone | Agent Platform Builder | Allow access to agent platform. | Agent platform builder |
| <input type="checkbox"/> Clone | Agentforce Default Admin | Allows users to build and manage in... | Agentforce (Default) |
| <input type="checkbox"/> Clone | Agentforce Service Agent Configurati... | Build and manage autonomous AI ser... | Agentforce Service Agent Builder |
| <input type="checkbox"/> Clone | Agentforce Service Agent Object Acc... | Access knowledge articles and mana... | Agentforce Service Agent User |
| <input type="checkbox"/> Clone | Agentforce Service Agent Secure Base | Set up and use Agentforce Service Ag... | Agentforce Service Agent User |
| <input type="checkbox"/> Clone | Agentforce Service Agent User | Analyze topics and perform actions a... | Agentforce Service Agent User |
| <input type="checkbox"/> Clone | Authenticated Payer | An authenticated external user with t... | Salesforce Payments External |
| <input type="checkbox"/> Clone | Buyer | Allows access to the store. Lets user... | B2B Buyer Permission Set One Se... |
| <input type="checkbox"/> Clone | Buyer Manager | Includes all Buyer capabilities, and all... | B2B Buyer Manager Permission S... |
| <input type="checkbox"/> Clone | C360 High Scale Flow Integration User | Allows integration user to access feat... | Cloud Integration User |
| <input type="checkbox"/> Clone | CRM User | Denotes that the user is a Sales Clou... | CRM User |
| <input type="checkbox"/> Clone | Code Builder User | Enables the user to create and acces... | Code Builder |
| <input type="checkbox"/> Clone | Commerce Admin | Allow access to commerce admin fea... | Commerce Admin Permission Set |
| <input type="checkbox"/> Clone | Commerce Session | Allow access to session-based permis... | Commerce Session Permission S... |
| <input type="checkbox"/> Clone | ConnectivityServiceCASCPermSet | | Cloud Integration User |
| <input type="checkbox"/> Clone | Contact Center Admin | Manage Service Cloud Voice contact ... | Service Cloud Voice User |
| <input type="checkbox"/> Clone | Contact Center Admin (Partner Telep... | Manage Service Cloud Voice contact ... | Service Cloud Voice User (Partner) |

Dashboard: Dashboard help you visually understand changing business condition so you can make decision based on the real-time data you have gathered with reports.

The screenshot shows a Salesforce Lightning interface. At the top, there's a header with a house icon, the URL 'eloop.lightning.force.com', a plus sign, a '4' in a box, and three vertical dots. Below the header is a toolbar with a blue cloud icon, a star dropdown, a plus sign, a triangle, a question mark, a gear, a bell with a '2' notification, and a user profile icon. A search bar with the placeholder 'Search...' is also present. The main navigation bar includes 'Jewellery Inventory ...', 'Jewel Customers', 'Items', 'Prices', 'Orders', 'Dashboards' (which is underlined), and 'More'. On the left, a sidebar shows a 'Dashboard' icon and the title 'dashboards 1'. It includes a note: 'Last refreshed 3 days ago. Refresh this dashboard to see the latest data.' and 'As of Sep 2, 2025, 9:05 AM · Viewing as Renuga sri R'. The main content area displays a table titled 'New Prices Report' with the following data:

| Price: Price Id...↑ | Gold Pri... | Price: ID |
|---------------------|-------------|-----------------|
| Price-01 | \$312 | a04gL000009Vqy1 |
| Price-02 | \$4 | a04gL000009Vr2r |
| Price-03 | \$5 | a04gL000009Vr4T |
| Price-04 | \$5 | a04gL000009Vr65 |
| Price-05 | \$6 | a04gL000009Vr7h |
| Price-06 | \$5 | a04gL000009VmM |
| Price-07 | \$5 | a04gL000009Vr9J |

At the bottom of the report table, there's a link 'View Report (New Prices ... As of Sep 2, 2025, 9:05 AM)'. The background of the dashboard is light blue.

Reports: Report give you access to your data.

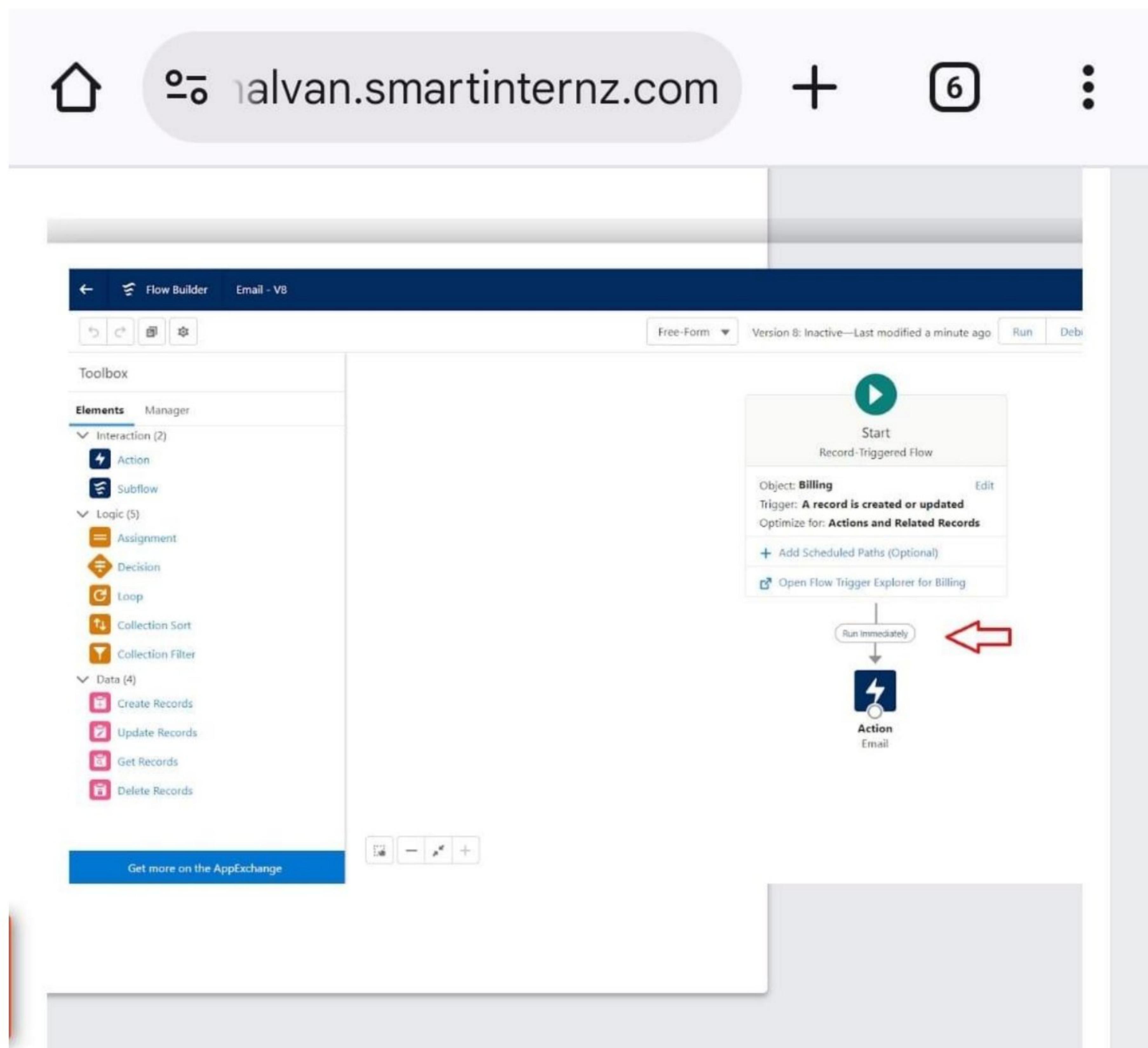
The screenshot shows a Salesforce Lightning interface. At the top, there is a navigation bar with icons for Home, a search bar containing 'elop.lightning.force.com', a plus sign, a circular icon with the number '4', and three vertical dots. Below the navigation bar is a toolbar with a blue cloud icon, a star icon, a plus sign, a download icon, a question mark, a gear icon, a bell icon with a red notification count of '2', and a user profile icon. A search bar with the placeholder 'Search...' is also present.

The main content area has a header with the text 'Jewellery Inventory ...' and several dropdown menus: 'Jewel Customers', 'Items', 'Prices', 'Orders', 'Billings', 'Reports' (which is currently selected), and 'More'. Below the header is a sub-header for a report titled 'Report: Prices New Prices Report'. This sub-header includes buttons for 'Enable Field Editing', a magnifying glass icon, 'Add Chart', a filter icon, a clear icon, 'Edit', and a dropdown menu.

Below the sub-header, there is a summary row showing 'Total Records' (10) and 'Total Gold Price' (\$358). The main data area is a table with the following columns: 'Price: Price Id', 'Gold Price', and 'Price: ID'. The table contains 11 rows of data:

| | Price: Price Id | Gold Price | Price: ID |
|----|-----------------|------------|-----------------|
| 1 | Price-06 | \$5 | a04gL000009VmmM |
| 2 | Price-01 | \$312 | a04gL000009Vqy1 |
| 3 | Price-02 | \$4 | a04gL000009Vr2r |
| 4 | Price-03 | \$5 | a04gL000009Vr4T |
| 5 | Price-04 | \$5 | a04gL000009Vr65 |
| 6 | Price-05 | \$6 | a04gL000009Vr7h |
| 7 | Price-07 | \$5 | a04gL000009Vr9J |
| 8 | Price-08 | \$8 | a04gL000009VrAv |
| 9 | Price-09 | \$5 | a04gL000009VrCX |
| 10 | Price-10 | \$3 | a04gL000009VrE9 |
| 11 | | \$358 | |

Flows: A Flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps.



4. Advantages and disadvantage

Advantage

CRM helps manage customer data, allowing jewel to understand individual preferences and offer tailored recommendations and services, leading to a better customer experience.

The CRM With detailed customer profiles and buying history, jewel can identify profitable customer segments and create targeted marketing campaigns, increasing conversion rates.

CRM can integrate with inventory and sales systems, providing a consolidated view of stock and customer interactions, which streamlines operations.

Disadvantage

Implementing a CRM system can involve significant costs for software, customization, and initial training, which might be a barrier for smaller businesses.

Storing sensitive customer and inventory data in a centralized database raises concerns about potential breaches or unauthorized access, requiring strong security measures.

Staff may resist adopting new technology and workflows, especially if they are unfamiliar with the system or perceive it as a threat to their r

5.Conclusion

it is a business strategy and toolset for building strong, lasting customer relationships through centralized data, personalized experiences, and streamlined processes, ultimately driving growth, profitability, and customer loyalty. By providing valuable insights and automating tasks, CRM helps businesses foster trust, understand customer needs, and deliver superior value, making it a cornerstone of successful, customer-centric operations

6.Appendix

Create A Trigger Handler Class :

```
public class UpdatePaidAmountTriggerHandler {  
  
    public static void handleBeforeInsert(List<Billing__c> newBillings) {  
  
        for (Billing__c billing : newBillings) {  
  
            billing.Paid_Amount__c = billing.Paying_Amount__c;  
  
        }  
  
    }  
}
```

```
public static void handleBeforeUpdate(Map<Id, Billing__c> oldBillingsMap,
List<Billing__c> updatedBillings) {

    for (Billing__c billing : updatedBillings) {

        Billing__c oldBilling = oldBillingsMap.get(billing.Id);

        Decimal oldPaidAmount = oldBilling.Paid_Amount__c;

        billing.Paid_Amount__c = oldPaidAmount + billing.Paying_Amount__c;

    }

}
```

Create The Trigger :

```
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);  
  
    }  
}
```