

**CRM APPLICATION FOR JEWEL MANAGEMENT -  
(DEVELOPER)**

**NAAN MUDHALVAN PROJECT REPORT**

**Submitted by**

<b>A.VANASOFY</b>	<b>(912422104054)</b>
<b>S.SWETHA</b>	<b>(912422104049)</b>
<b>SM.SWETHA</b>	<b>(912422104050)</b>
<b>T.SWETHA</b>	<b>(912422104051)</b>

**DEPARTMENT OF  
COMPUTER SCIENCE AND ENGINEERING**



**SHANMUGANATHAN ENGINEERING COLLEGE**

**ARASAMPATTI – 622 507**

## **BONAFIED CERTIFICATE**

Certified that this project report “**CRM APPLICATION FOR JEWEL MANAGEMENT-(DEVELOPER)**” is the bonafide work of “**A.VANASOFY(912422104054), S. SWETHA(912422104049),SM. SWETHA(912422104050),T. SWETHA(912422104051)**” who carried out the mini project Work under my supervision.

**COURSE COORDINATOR,**

Mrs.S.Vinodha,M.E,  
Assistant Professor,  
Department of CSE,  
Shanmuganathan Engineering College,  
Arasampatti.

**HEAD OF THE DEPARTMENT,**

Mr.S.Saravanakumar ,M.E,  
Assistant Professor,  
Department of CSE,  
Shanmuganathan Engineering College,  
Arasampatti.

**STAFF IN-CHARGE**

**HEAD OF THE DEPARTMENT**

**Submitted for Viva-Voce Examination held on \_\_\_\_\_**

**INTERNAL EXAMINER**

**EXTERNAL EXAMINER**

## ACKNOWLEDGEMENT

With warm hearts and immense pleasure, we thank the almighty for his grace and blessing bestowed on us, which drove us to the successful completion of this project. We take this opportunity to express our sincere thanks to the significant contribution given by the management of our College Chairman “**KALVI VALLAL Mrs.Pichappa Valliammai**”, who is guiding light for all activities in our college.

We express our sincere and humble tone of thanks to our Correspondent **Dr. P.Manikandan** we would like to thank the management of the college for providing us with all facilities needed for the successful completion of our work.

We also extend our heartfelt gratitude to our respected Secretary **Mr.Vishwanathan** who kind heartedly permitted us to go ahead with our project.

We express our sincere and humble tone of thanks to our energetic Principal **Dr.KL.Muthuramu M.E.,(W.R),M.E.,(S.E),M.I.S.T.E.,FIE.,ph.d.**, we would like to thank the management of the college for providing us with all facilities needed for the successful completion of our work.

We would like to thank to all the staff members of CSE department who had provide their contribution to steer our project towards the successful completion. thank our Head of the Department **Mr.S.Saravanakumar,M.E**,Head of the Department, Department of Computer Science and Engineering, for her cooperation, advice and suggestions at every stage of our project work.

We also wish to acknowledge with thanks the cooperation, assistance, and encouragement extended by **Mrs.S.Vinodha,M.E,A/P** of the CSE department who contributed their time and expertise during the development of our project.

We also convey our humble Finally , we thank our family members who have spent their wealth for our studies and have motivated us to complete this project successfully.

<b>S.NO</b>	<b>TITLE</b>	<b>PG.NO</b>
1.	Abstract	1
2.	Introduction	2
3.	Objectives	3
4.	System Requirements	4
5.	Modules of the system	4
6.	Technology used	9
7.	System Design	9
8.	Workflow Description	10
9.	Implementation Steps	13
10.	Expected Outcomes	28
11.	Advantages	28
12.	Future Enhancements	28
13.	Conclusion	29
14.	References	29

## 1. ABSTRACT

The **Jewel Management System** is a comprehensive **Salesforce-based cloud application** designed to streamline and automate the operations of a jewelry business. This system eliminates the limitations of manual record maintenance by providing an integrated platform to manage customers, items, prices, and billing details in a structured and efficient manner. Built entirely using Salesforce's **declarative development features**, such as *Object Manager*, *App Builder*, and *Flow Builder*, the project highlights the power of low-code tools to deliver enterprise-level solutions without writing complex code.

The system architecture is based on multiple interconnected custom objects—**Jewel Customer**, **Item**, **Price**, and **Billing**—each serving a unique purpose within the overall business process. These objects are linked through **lookup relationships**, enabling seamless data flow and ensuring that all records remain consistent and accurate. For example, when a new item is created or its price changes, the related billing record automatically reflects the updates, maintaining data integrity across the platform.

To enhance automation and user experience, the project incorporates **Record-Triggered Flows** that execute predefined actions when specific conditions are met. This eliminates the need for manual updates, reduces human error, and improves operational efficiency. Additionally, the system leverages Salesforce's **cloud infrastructure**, providing accessibility from anywhere, automatic data backups, and real-time synchronization across users and devices.

Overall, the Jewel Management System demonstrates how **cloud-based CRM solutions** can digitally transform small and medium enterprises by reducing manual work, increasing accuracy, and ensuring scalability. The project reflects the principles of modern software engineering—automation, integration, and usability—implemented through Salesforce's powerful yet user-friendly platform. This application serves as a foundation for future enhancements like inventory tracking, sales analytics, and customer relationship optimization, showing the real-world impact of adopting **low-code technology** for business process automation.

## 2. INTRODUCTION

In today's digital era, businesses are rapidly shifting from traditional management systems to cloud-based platforms to improve efficiency, accuracy, and customer satisfaction. The jewelry industry, in particular, deals with complex operations such as maintaining customer information, tracking product details, managing pricing updates, and generating invoices. Managing these operations manually often leads to errors, delays, and poor data organization. To overcome these challenges, the **Jewel Management System** was developed using **Salesforce**, a leading cloud-based Customer Relationship Management (CRM) platform.

The Jewel Management System aims to simplify and automate the day-to-day activities of a jewelry business by utilizing Salesforce's powerful declarative tools. It enables seamless management of **customers, items, prices, and billing records** within a single integrated system. The project demonstrates how Salesforce's low-code environment allows users to design, implement, and automate business processes without extensive programming knowledge.

By using tools such as **Object Manager** and **Flow Builder**, the system provides a structured approach to data organization and automation. The Object Manager facilitates the creation of custom objects and relationships, while Flow Builder automates tasks like updating billing records when a new item or customer is added. These features together ensure **data consistency, accuracy, and real-time synchronization**, which are critical for maintaining business reliability.

The project also showcases Salesforce's adaptability for small and medium enterprises (SMEs) that seek affordable and efficient solutions for digital transformation. With its cloud infrastructure, the system offers benefits such as **remote accessibility, secure data storage, scalability, and reduced maintenance effort**.

Overall, this project serves as an example of how technology can transform traditional business models into modern, automated systems. The **Jewel Management System** not only enhances business efficiency but also sets the foundation for future developments like sales analytics, inventory management, and customer loyalty programs. It illustrates the potential

of CRM-based applications in improving decision-making and fostering growth in the jewelry sector.

### 3. OBJECTIVES

The primary objective of the **Jewel Management System** is to design and implement a **Salesforce-based cloud solution** that simplifies and automates the operations of a jewelry business. The project focuses on replacing manual processes with an efficient, accurate, and easily accessible digital system using Salesforce's declarative tools.

The following are the key objectives of the project:

1. **To Automate Jewelry Business Operations:**

The system aims to reduce manual work by automating core processes such as maintaining customer details, updating item prices, and generating billing information through record-triggered flows.

2. **To Ensure Data Accuracy and Consistency:**

By establishing relationships between custom objects like Jewel Customer, Item, Price, and Billing, the system ensures that all related data remains synchronized and error-free across all records.

3. **To Utilize Salesforce Declarative Tools:**

The project demonstrates the use of Salesforce tools such as **Object Manager**, **App Builder**, and **Flow Builder** to design a fully functional application without traditional programming.

4. **To Improve Accessibility and Efficiency:**

Being cloud-based, the Jewel Management System allows users to access business information from anywhere at any time, ensuring better data availability and faster decision-making.

5. **To Provide a Scalable and Secure Platform:**

The system leverages Salesforce's secure and scalable infrastructure to handle growing data volumes and ensure data protection, reliability, and backup.

**6. To Facilitate Easy Customization and Maintenance:**

Salesforce's low-code environment enables easy updates, additions, or modifications to business logic without requiring extensive technical knowledge.

**7. To Demonstrate Digital Transformation Using CRM Tools:**

The project showcases how small and medium businesses can adopt CRM technology to improve efficiency, automate repetitive tasks, and enhance overall customer experience.

## **4. SYSTEM REQUIREMENTS**

### **4.1. Software Requirements**

- Salesforce Developer Edition
- Trailhead Playground
- Google Chrome / Microsoft Edge
- Windows or macOS Operating System
- Internet Connectivity

### **4.2. Hardware Requirements**

- Processor: Intel i3 or higher
- RAM: Minimum 4 GB (recommended 8 GB)
- Storage: Minimum 10 GB
- Stable Internet Connection

## **5. MODULES OF THE SYSTEM**

### **5.1. Setup & Configuration Module**

#### **5.1.1. Creation of Object**

- In Salesforce, **Objects** are like **database tables** that store specific business data.



- They hold information related to entities such as *Customers, Items, or Orders*.
- Salesforce includes **Standard Objects** (like Account, Contact) and allows the creation of **Custom Objects** as per project requirements.
- **Example:** A custom object named **Jewelry\_Item** was created to store jewelry details such as **Material Type, Weight, and Price** for each product.

#### 5.1.2. Creation of Fields

- **Fields** represent individual pieces of data within an object, similar to columns in a table.
- Salesforce provides both **Standard Fields** (ID, Owner, Created Date) and **Custom Fields** that can be added manually.
- Common field types include **Text, Number, Picklist, Currency, Date, Formula, and Lookup**.
- **Example:** Custom fields like **Gold Purity, Weight, and Price** were added to the *Jewelry\_Item* object to record specific product information.

#### 5.1.3. Creation of Tabs

- **Tabs** provide an easy way to access object records directly from the app navigation bar.
- When a tab is created for an object, users can open, view, and manage its records conveniently.
- **Example:** A tab was created for *Jewelry\_Item* so users can quickly access jewelry details in the app.

#### 5.1.4. Creation of Lightning App

- A **Lightning App** is a customized workspace in Salesforce that combines multiple objects, tabs, and dashboards into one application.
- It helps users focus only on the tools relevant to their business tasks.

- **Example:** A “**Jewelry Management App**” was created containing:
  - Objects: *Jewelry Items, Customers, Orders*
  - Dashboards: *Sales Insights*
  - Tabs: *Reports, Settings*

#### 5.1.5. Creation of Page Layouts

- **Page Layouts** control the design and visibility of fields, sections, buttons, and related lists on record pages.
- They determine what information users see when they create or view a record.
- **Example:** Different layouts were designed for **Retail Jewelry** and **Wholesale Jewelry** to make forms more user-friendly.

#### 5.1.6. Creation of Record Types

- **Record Types** help manage multiple business processes within the same object.
- They allow different page layouts, picklist values, and workflows to be assigned based on record type.
- **Example:** For the *Jewelry\_Item* object:
  - Record Type 1: **Gold Jewelry**
  - Record Type 2: **Silver Jewelry**

### 5.2. Security & Access Control Module

#### 5.2.1. Creation of Profiles

- A **Profile** defines what a user can do in Salesforce (e.g., Create, View, Edit, Delete).
- Every user must have one profile that controls their access and permissions.

- **Example:**

- *Admin Profile* – Full access to all objects and settings.
- *Sales Profile* – Limited access to only customer and item records.

### 5.2.2. Creation of Roles

- A **Role** defines **data visibility** — what information a user can view within the organization.
- Roles help structure data sharing according to hierarchy.

- **Example:**

- *Manager* – Can view all team records.
- *Salesperson* – Can only view their own records.

### 5.2.3. Creation of Permission Sets

- **Permission Sets** give additional access to users without changing their profile.
- They are optional but useful when temporary or extra permissions are needed.
- **Example:** A *Permission Set* was created to give specific users access to **Reports** and **Dashboards**.

### 5.2.4. Creation of User

- A **User** represents a person who logs in to Salesforce.
- Each user is assigned a **Profile**, **Role**, and optional **Permission Sets**.
- **Example:** Creating a new user account for a sales employee to manage customer records in the system.

### 5.3. Reporting & Analytics Module

#### 5.3.1. Creation of Reports

- A **Report** provides a detailed and filtered view of stored data.
- It helps analyze trends, sales, and business performance using various filters and summaries.
- **Example:** A **Sales Report** showing total jewelry sales per month was created for business insights.

#### 5.3.2. Creation of Dashboards

- A **Dashboard** is a visual representation of data collected from reports.
- It uses **charts, graphs, and metrics** for quick decision-making and tracking performance.
- **Example:** A dashboard displaying **Top-Selling Jewelry Items** and **Monthly Revenue** was designed for management review.

### 5.4. Automation & Process Module

#### 5.4.1. Creation of Flow

- A **Flow** is Salesforce's automation tool used to perform business processes without coding.
- It can create, update, or delete records automatically and perform logical operations.
- **Example:** When a new jewelry order is created, a **Flow** automatically updates the related billing record and sends a confirmation email to the customer.

### 5.5. User Management & Adoption Module

#### 5.5.1. Creation of User Adoption

- **User Adoption** measures how effectively users are engaging with the Salesforce system.

- It tracks login frequency, feature usage, and data entry activity.
- Tools like **User Adoption Reports, Dashboards, and In-App Guidance** help improve engagement.
- **Example:** A dashboard was built to monitor which employees actively log in and enter sales data regularly.

## 6. TECHNOLOGIES USED

- Salesforce Lightning Platform
- Metadata-Driven Architecture
- Low-Code Tools: Flow Builder, App Builder, Page Layout Editor
- Security Framework: Profiles, Roles, Permission Sets
- Analytics Tools: Report Builder, Dashboard Builder
- Schema Tools: Object Manager, Schema Builder

## 7.SYSTEM DESIGN

### 7.1 Design Approach:

The project follows a **modular and relational design** using Salesforce custom objects. Each object (Customer, Item, Price, Billing) handles a specific part of the jewelry business process and is connected using lookup relationships.

### 7.2 Architecture Used:

The system is based on the **Salesforce cloud architecture**, which includes:

- **User Interface Layer:** Salesforce Lightning App and Tabs for users to interact with data.

- **Application Layer:** Declarative tools like Object Manager and Flow Builder to handle logic.
- **Database Layer:** Salesforce database that stores all object records securely in the cloud.

### 7.3 Data Flow:

- The user enters customer and item details.
- Item prices are stored in the Price object.
- When a new billing record is created or updated, the **Flow** automatically calculates and updates the billing amount.
- All related data (Customer → Item → Billing) stays connected and updated.

### 7.4 Key Design Tools Used:

- **Object Manager** – for creating and managing objects and fields.
- **Flow Builder** – for automation and record-triggered actions.
- **App Builder** – for creating the custom app and page layouts.
- **Schema Builder** – for visualizing relationships among objects.

## 8. WORKFLOW DESCRIPTION

The **workflow** of the Jewel Management System explains how data moves and actions take place inside the Salesforce application — from entering customer details to generating the final billing record. It shows the step-by-step process that keeps all modules connected and automated.

### Step 1: Customer Information Entry

- The process begins when a new **customer** is added using the *Jewel Customer* object.
- Details like customer name, address, state, country, and postal code are entered and saved in Salesforce.

## Step 2: Adding Item Details

- After creating a customer, the next step is to add **item details** in the *Item* object.
- Each item record is linked to a specific customer using a **lookup relationship**.
- Information like item name, type, and category is stored here.

## Step 3: Setting the Price

- The **Price** object is used to define the cost of jewelry items such as silver or gold rates.
- These prices are stored using the currency data type and can be updated whenever rates change.

## Step 4: Generating Billing Record

- Once the customer, item, and price data are available, the **Billing** record is created.
- It includes details like customer name, item name, and total amount.
- This record connects all three objects to generate accurate billing information.

## Step 5: Automation using Flow

- A **Record-Triggered Flow** is created for the Billing object.
- Whenever a billing record is created or updated, the flow automatically fetches related item and price data.
- It calculates the total billing amount and updates the record without manual effort.

## Step 6: Data Update and Storage

- All records (Customer, Item, Price, Billing) are stored securely in the Salesforce cloud.
- Any update made in one object (like price change) automatically reflects in the related billing record through the flow.

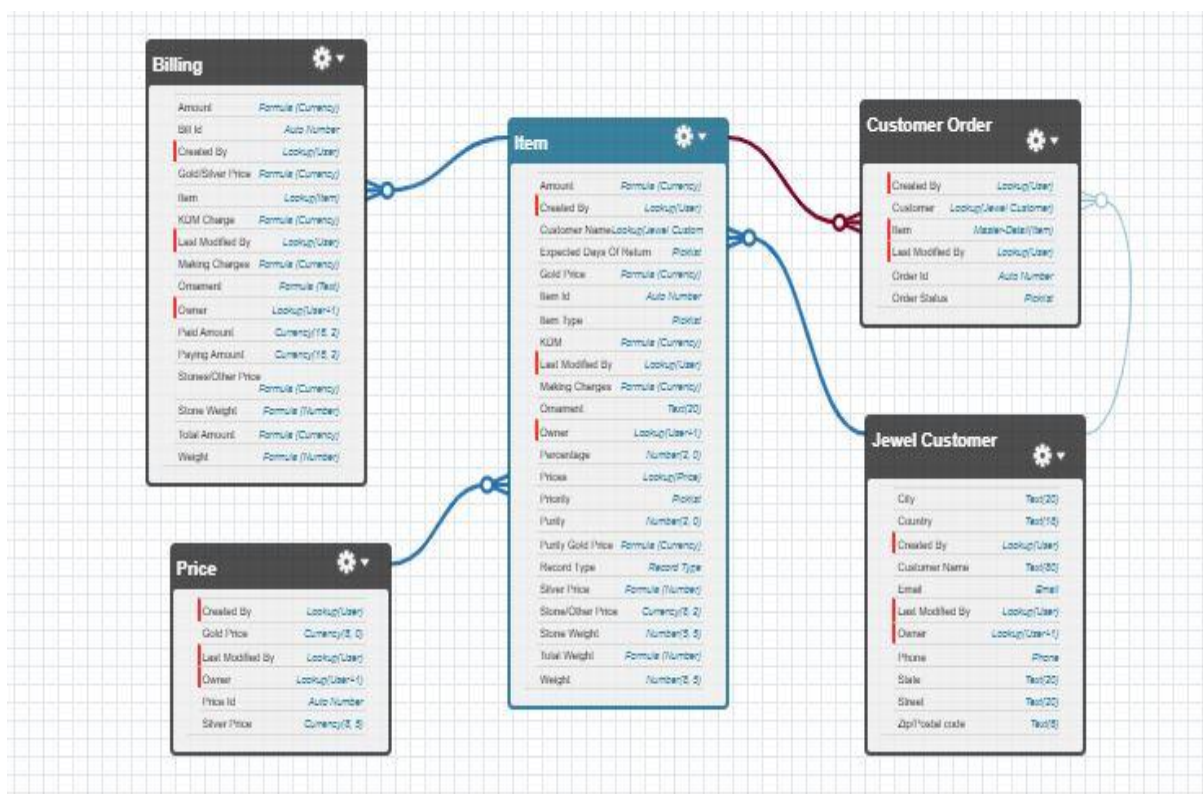
## Step 7: Viewing and Managing Data

- Users can view all related records through tabs and page layouts.
- The **App Builder** ensures that all modules are easily accessible within a single application view.

## Step 8: Reporting & Dashboards

- Management can view real-time sales reports, stock availability, and customer trends.
- Dashboards visually show KPIs and performance metrics to support business decisions.

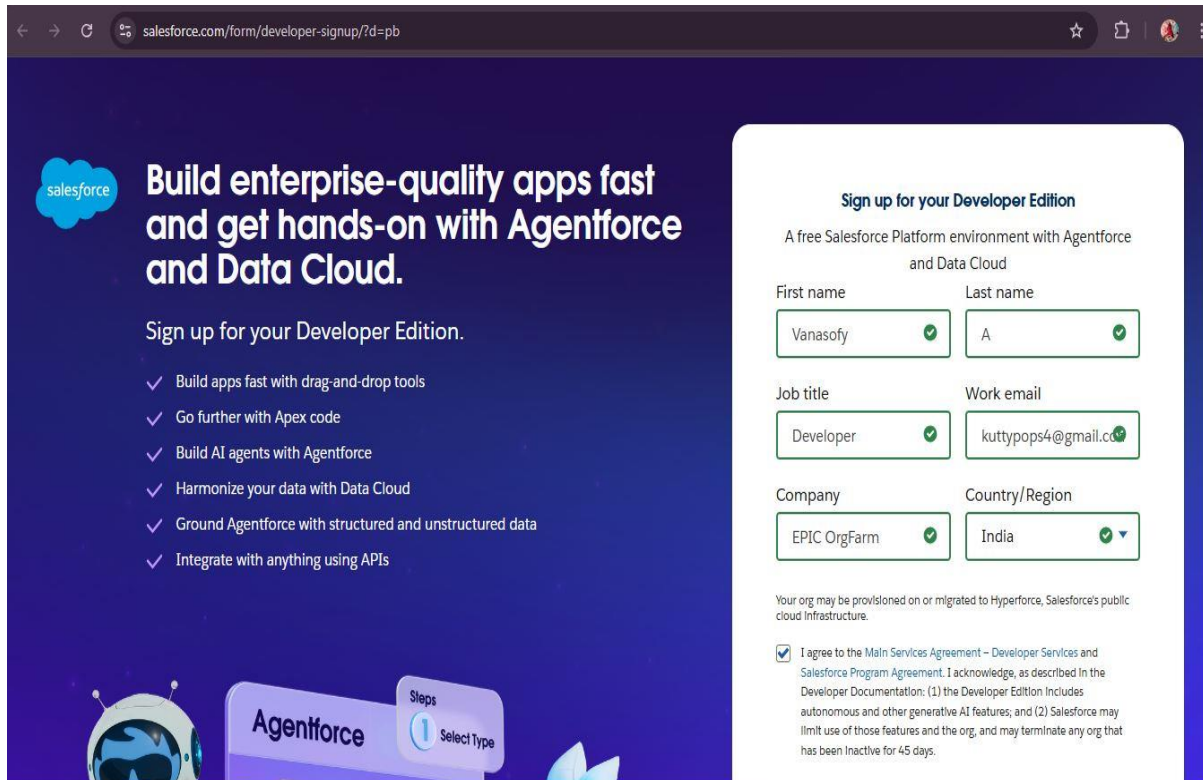
### 8.1 WORKFLOW DIAGRAM





## 9. IMPLEMENTATION PROCESS

### 1. SALESFORCE ACCOUNT CREATION



The screenshot shows the Salesforce Developer Edition sign-up page. On the left, there's a blue header with the Salesforce logo and the text "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists five benefits: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", and "Integrate with anything using APIs". On the right, there's a white form titled "Sign up for your Developer Edition" with the subtitle "A free Salesforce Platform environment with Agentforce and Data Cloud". The form contains fields for "First name" (Vanasofy), "Last name" (A), "Job title" (Developer), "Work email" (kuttypops4@gmail.com), "Company" (EPIC OrgFarm), and "Country/Region" (India). Below the form, there's a checkbox for "I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement" which is checked. At the bottom, it says "Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud Infrastructure."

Fig 1.1 Sign up for salesforce developer

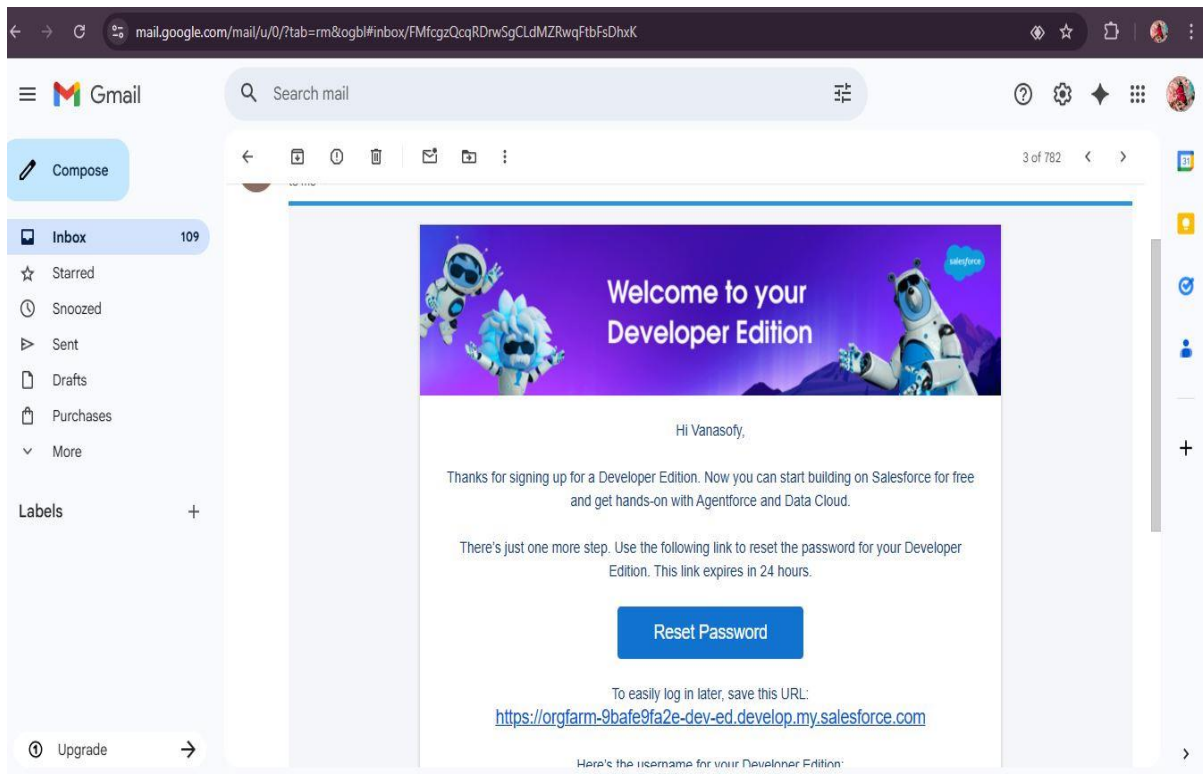


Fig 1.2 Activation of salesforce account

## 2. OBJECT CREATION

The figure consists of two screenshots of the Salesforce Setup interface, specifically the Object Manager section.

**Top Screenshot: Custom Object Definition Edit for 'Jewel Customer'**

The browser address bar shows: `orgfarm-9baf9fa2e-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01ldL00000822vR/edit?address=%2F01ldL00000822vR%2Fe%3Fret...`

The page title is "Jewel Customer". The left sidebar shows the "Details" tab selected. The main content area is titled "Custom Object Definition Edit" and includes the following fields:

- Custom Object Information:**
  - Label:** Jewel Customer (Example: Account)
  - Plural Label:** Jewel Customers (Example: Accounts)
  - Starts with vowel sound:** ☐
- The Object Name is used when referencing the object via the API:**
  - Object Name:** Jewel\_Customer (Example: Account)
  - Description:** (Empty text area)
- Context-Sensitive Help Setting:**
  - ☒ Open the standard Salesforce.com Help & Training window
  - ☐ Open a window using a Visualforce page

**Bottom Screenshot: Details view for 'Item' object**

The browser address bar shows: `orgfarm-9baf9fa2e-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01ldL000008231t/Details/view`

The page title is "Item". The left sidebar shows the "Details" tab selected. The main content area is titled "Details" and includes the following fields:

- Description:** (Empty text area)
- 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

Fig 2.1 Customer object for item & some of the objects

### 3. CREATING CUSTOM OBJECT TABS

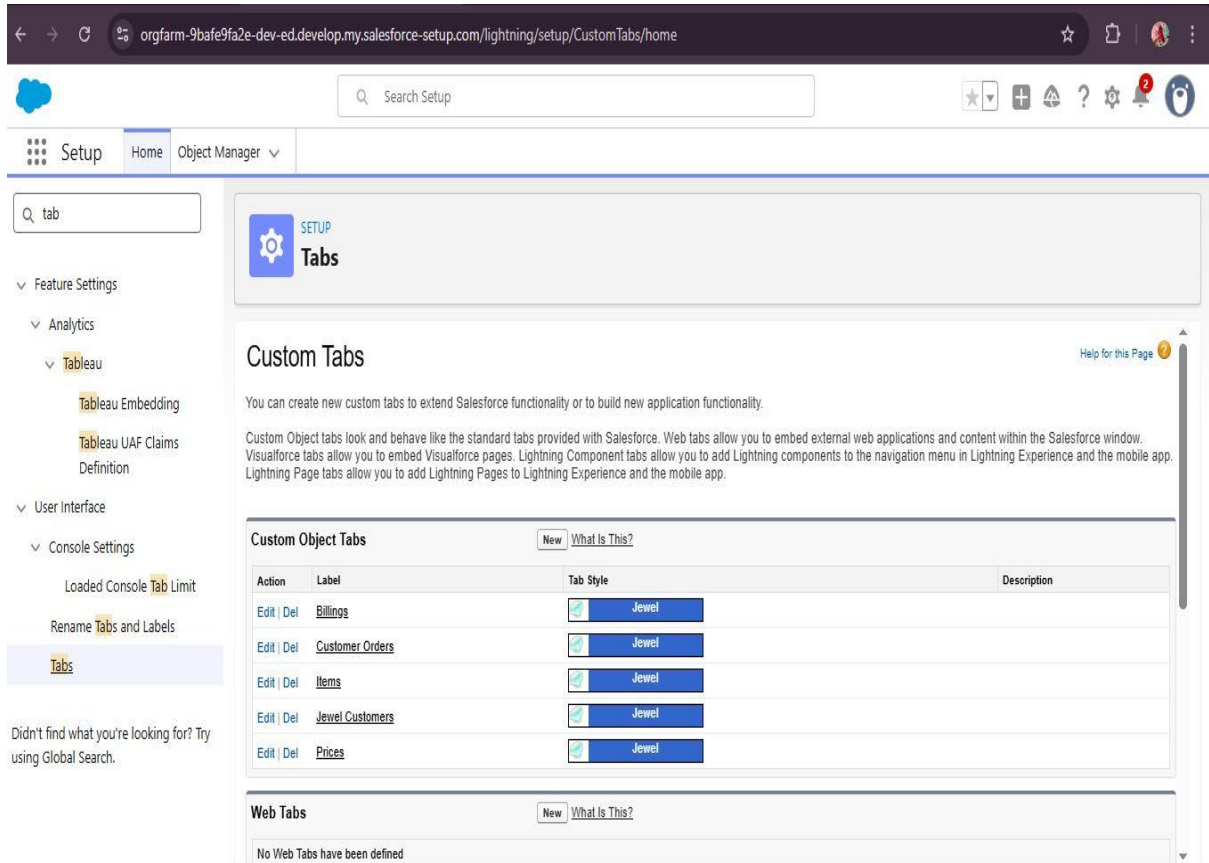


Fig 3.1 Creating custom tabs for billing, customer order, items, jewel customers, prices.

### 4. CREATING A LIGHTNING APP

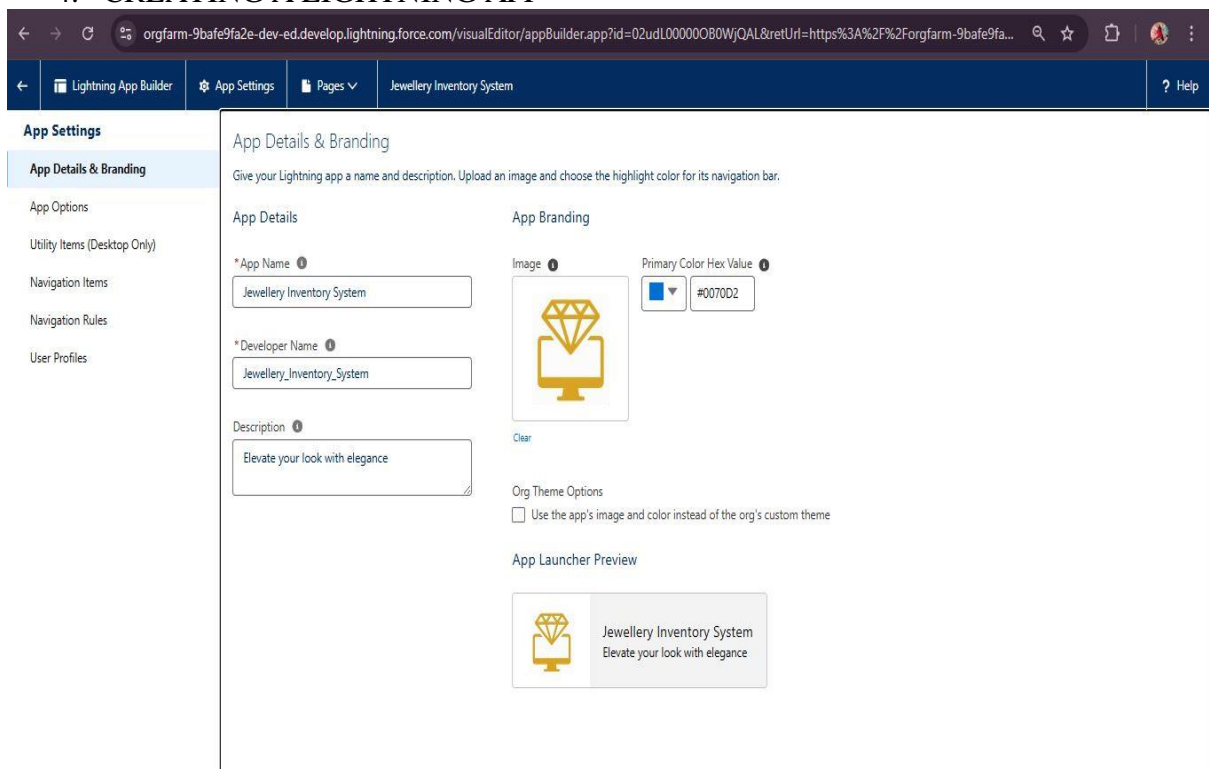


Fig 4.1 Lightning app for CRM application for jewel management-(developer).

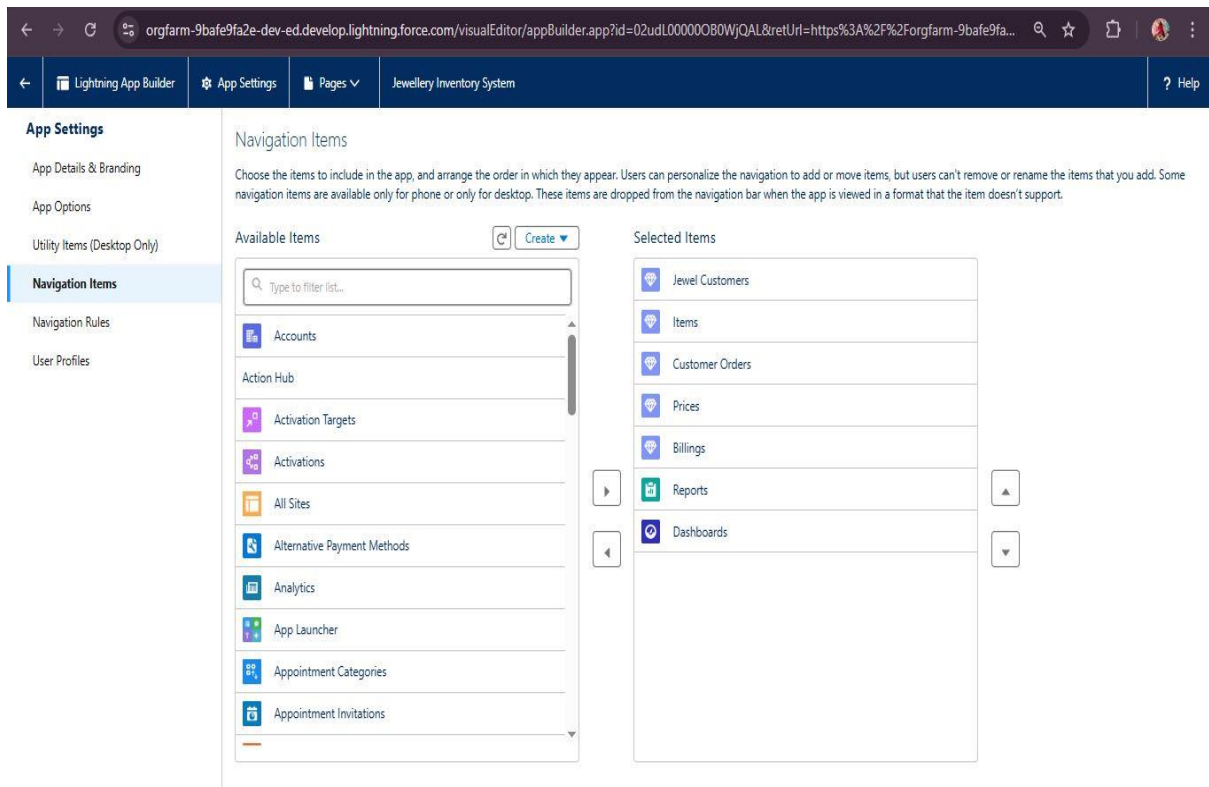


Fig 4.2 Navigation items for the application.

## 5. CREATION OF FIELDS IN OBJECTS

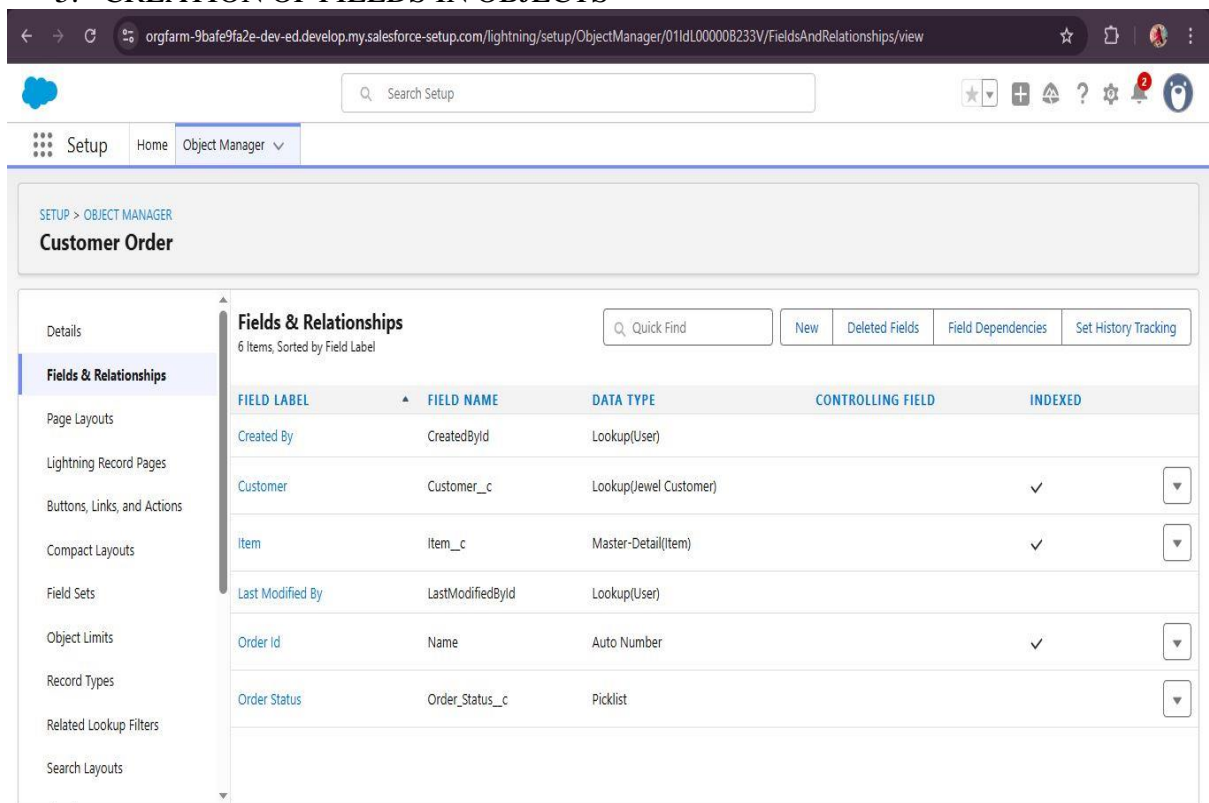


Fig 5.1 Fields of customer, item, order, order status for customer order.



## 6. CREATE SCHEMA BUILDER

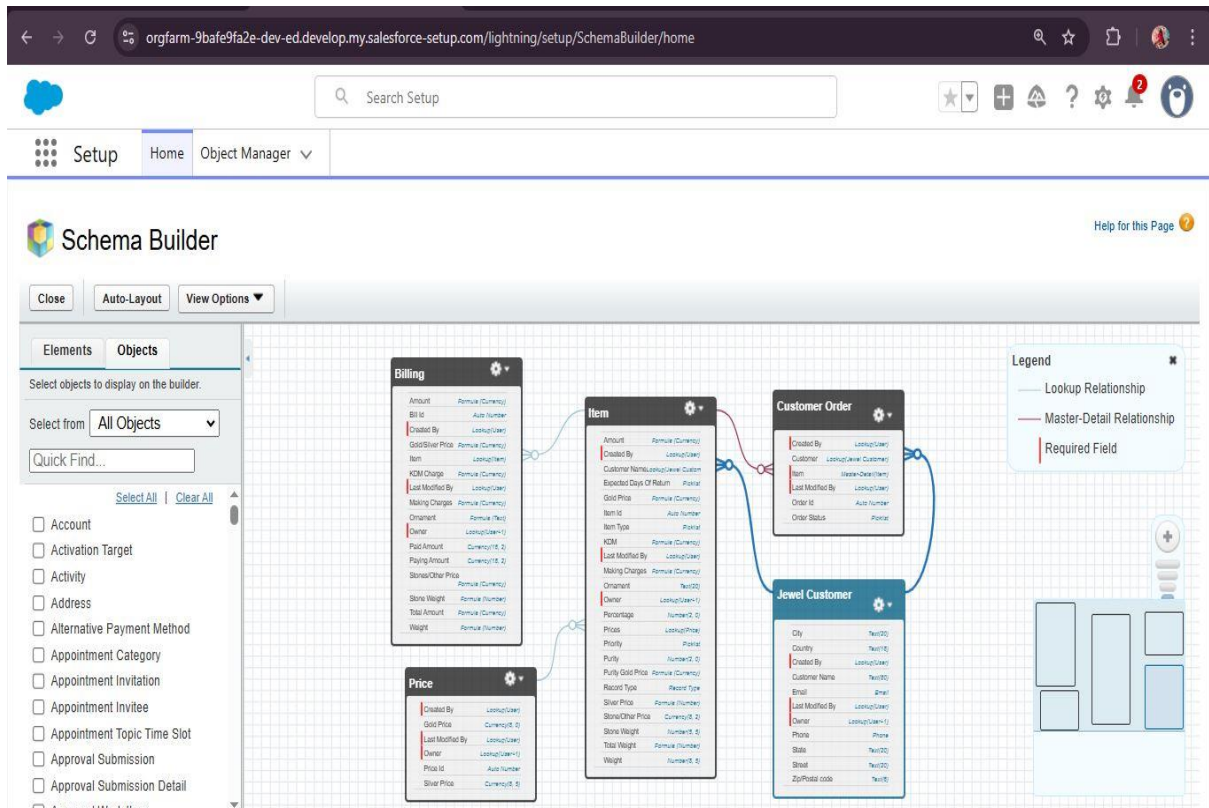


Fig 6.1 Schema builder for the application.

## 7. CREATING PROFILES

The screenshot shows the Salesforce Profiles page. The 'Gold Smith' profile is selected. The page displays the profile's details, including its name, user license, and description. Below the details, there's a section for 'Page Layouts' which lists the standard object layouts assigned to the profile. The 'Global' layout is 'Global Layout', and the 'Email Application' layout is 'Not Assigned'. The 'Home Page Layout' is 'Home Page Default'. The 'Object Milestone' layout is 'Object Milestone Layout'. The 'Location Group Assignment' layout is 'Location Group Assignment Layout'. The 'Macro' layout is 'Macro Layout'. The 'Object Milestone' layout is 'Object Milestone Layout'.

Fig 7.1 Setting up profile for gold smith and worker

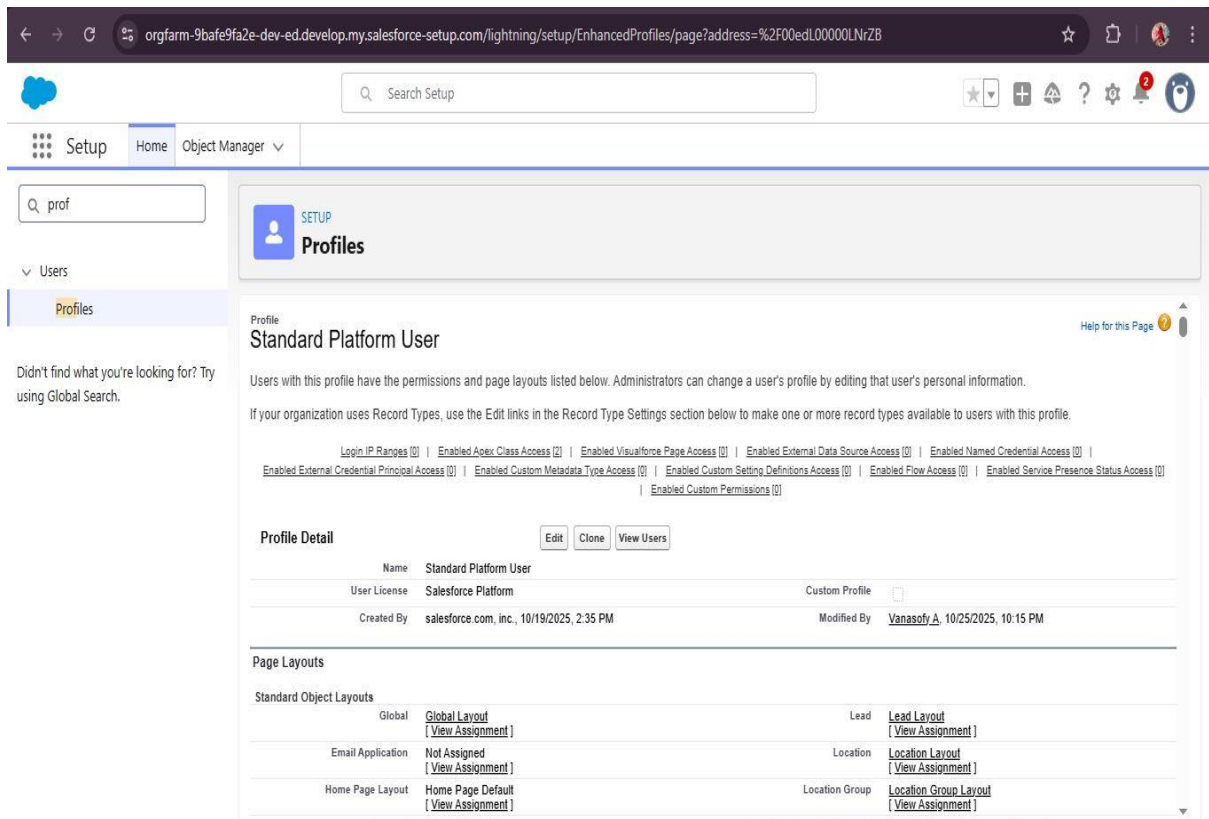


Fig 7.2 Setting up profile for gold smith and worker in standard platform user

## 8. CREATING ROLES

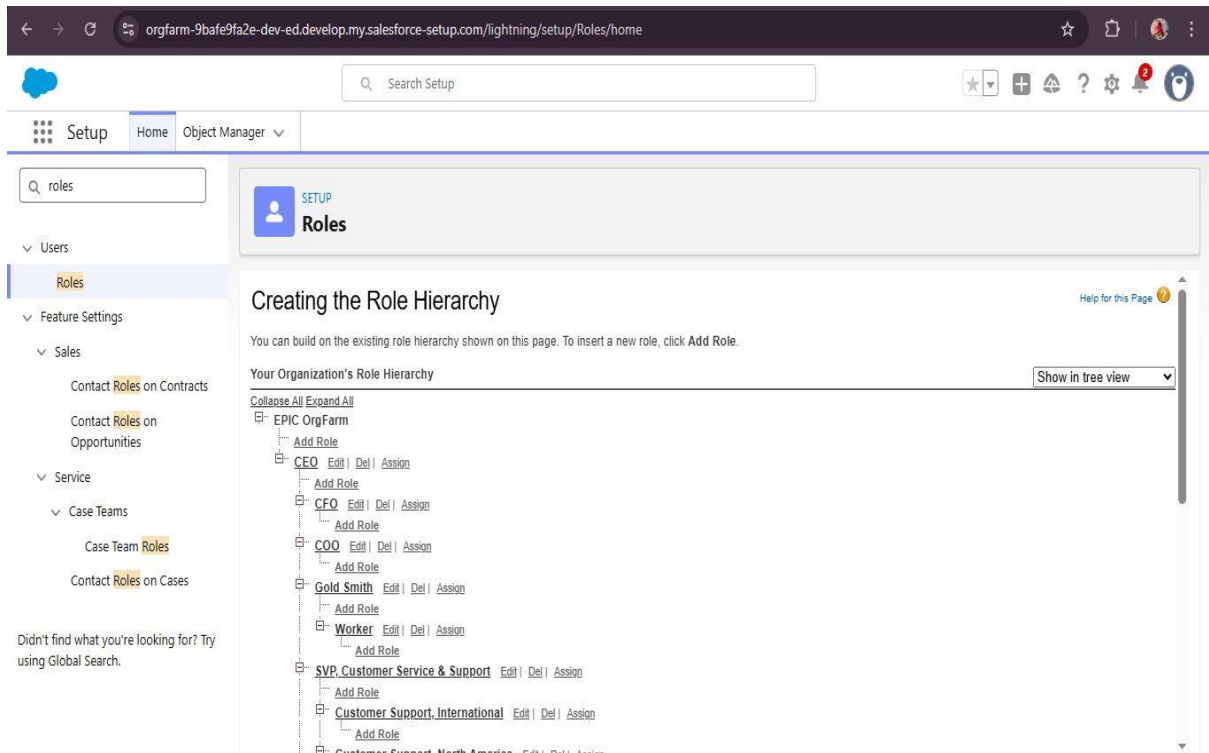


Fig 8.1 Creating rule hierarchy for gold smith and worker

## 9. CREATING USERS

The screenshot shows the Salesforce Setup page for Users. The left sidebar contains a search bar with "users" and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, and Data.com. The main content area is titled "Users" and includes a search bar, a "View: All Users" dropdown, and a "Create New User" link. Below this is a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including A. Vanasofy, Chatter Expert, EPIC\_OrgFarm, Mikaelson\_Elijah, Mikaelson\_Kol, Mikaelson\_Niklaus, User\_Integration, and User\_Security. At the bottom of the table are buttons for "New User", "Reset Password(s)", and "Add Multiple Users".

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	A. Vanasofy	kut	kutypops4869@agentforce.com		✓	System Administrator
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00dd00000fmcevuac.wjownu9vdyjo@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	EPIC_OrgFarm	OEPIC	epic.9846c059b58e@orgfarm.salesforce.com		✓	System Administrator
<a href="#">Edit</a>	Mikaelson_Elijah	emika	emika@jewelapp.com	Worker	✓	Worker
<a href="#">Edit</a>	Mikaelson_Kol	kmika	kol@jewelapp.com	Worker	✓	Worker
<a href="#">Edit</a>	Mikaelson_Niklaus	nmika	niklaus@jewelapp.com	Gold Smith	✓	Gold Smith
<a href="#">Edit</a>	User_Integration	inteq	integration@00dd00000fmcevuac.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Security	sec	insightsecurity@00dd00000fmcevuac.com		✓	Analytics Cloud Security User

Fig 10.1 Creating users

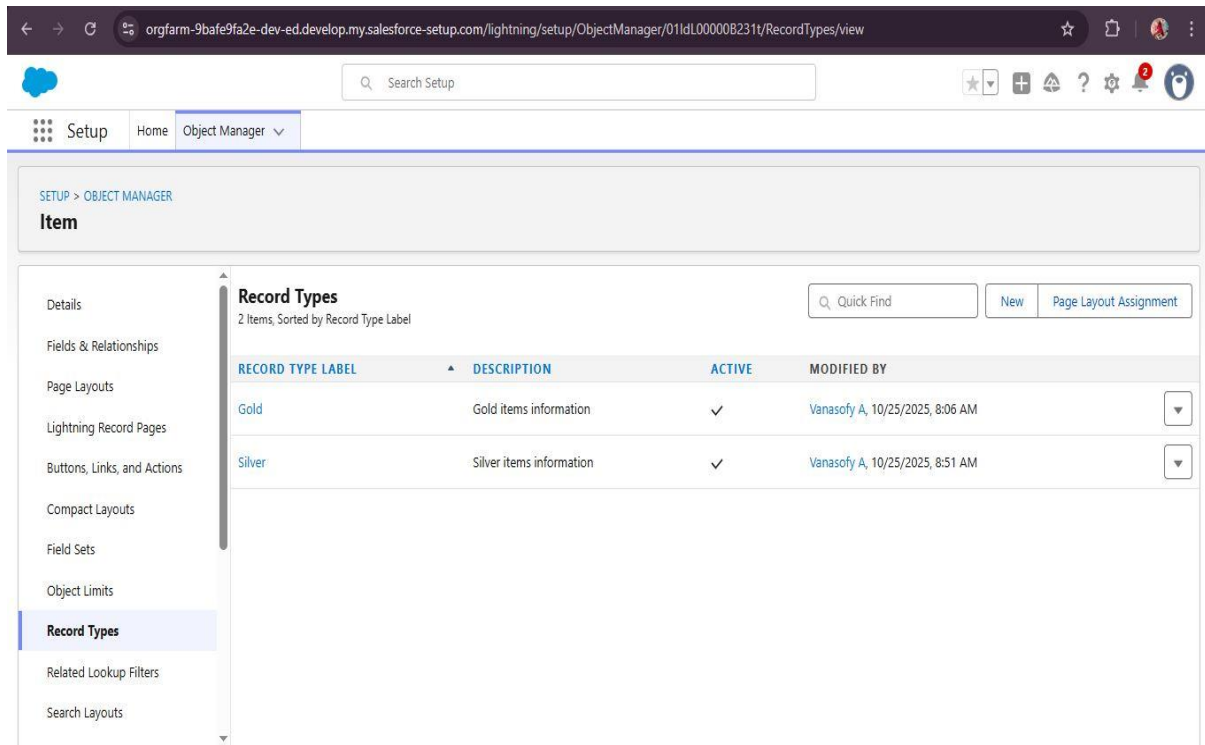
## 10. CREATING PAGE LAYOUTS

The screenshot shows the Salesforce Setup page for Page Layouts. The left sidebar contains a search bar and a list of navigation items: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled "Page Layouts" and includes a search bar, a "New" button, and a "Page Layout Assignment" button. Below this is a table of page layouts with columns for PAGE LAYOUT NAME, CREATED BY, and MODIFIED BY. The table lists three page layouts: Item Layout, Page Layout for Gold, and Page Layout for Silver.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Item Layout	Vanasofy A, 10/24/2025, 10:37 PM	Vanasofy A, 10/25/2025, 10:15 PM
Page Layout for Gold	Vanasofy A, 10/25/2025, 7:49 AM	Vanasofy A, 10/25/2025, 10:15 PM
Page Layout for Silver	Vanasofy A, 10/25/2025, 8:13 AM	Vanasofy A, 10/25/2025, 10:15 PM

Fig 10.1 Creating page layouts for item, gold, silver

## 11. CREATING A RECORD TYPES

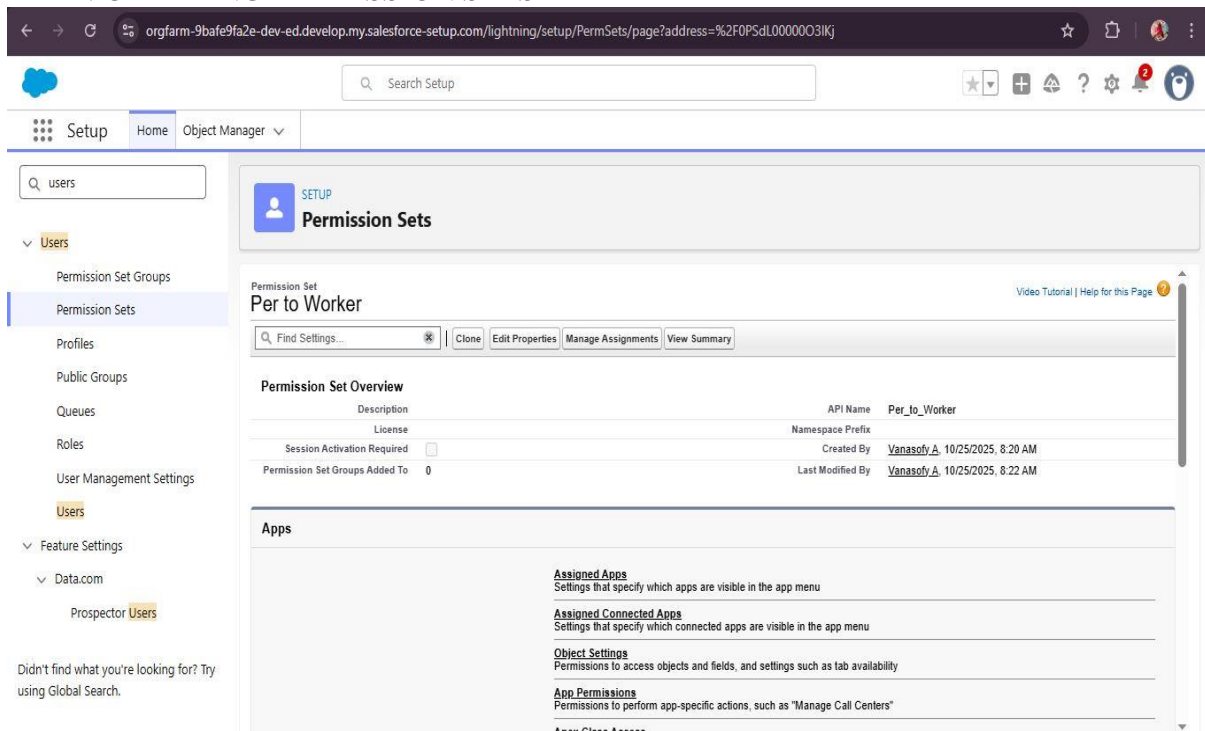


The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, **Record Types**, Related Lookup Filters, and Search Layouts. The main content area is titled 'Record Types' and shows a table with 2 items, sorted by Record Type Label. The table has columns for RECORD TYPE LABEL, DESCRIPTION, ACTIVE, and MODIFIED BY. The items are 'Gold' and 'Silver', both active, created by Vanasofy A. on 10/25/2025. There are 'New' and 'Page Layout Assignment' buttons at the top right of the table.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Gold	Gold items information	✓	Vanasofy A, 10/25/2025, 8:06 AM
Silver	Silver items information	✓	Vanasofy A, 10/25/2025, 8:51 AM

Fig 11.1 Creating report types for gold & silver

## 12. CREATING PERMISSION SETS



The screenshot shows the Salesforce Setup interface for Permission Sets. The left sidebar has a search bar with 'users' and a list of categories: Users, Feature Settings, and Data.com. Under 'Users', there are links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area is titled 'Permission Sets' and shows a specific permission set named 'Per to Worker'. It includes a 'Find Settings...' search bar and buttons for Clone, Edit Properties, Manage Assignments, and View Summary. The 'Permission Set Overview' section shows details for the 'Per\_to\_Worker' API Name, including Namespace Prefix, Created By (Vanasofy A, 10/25/2025, 8:20 AM), and Last Modified By (Vanasofy A, 10/25/2025, 8:22 AM). Below this, there are sections for 'Apps' with links to Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, and Apex Class Access.

Fig 15.3 Assigning permission sets for per to worker



### 13. DEVELOP APEX CLASS & TRIGGERS

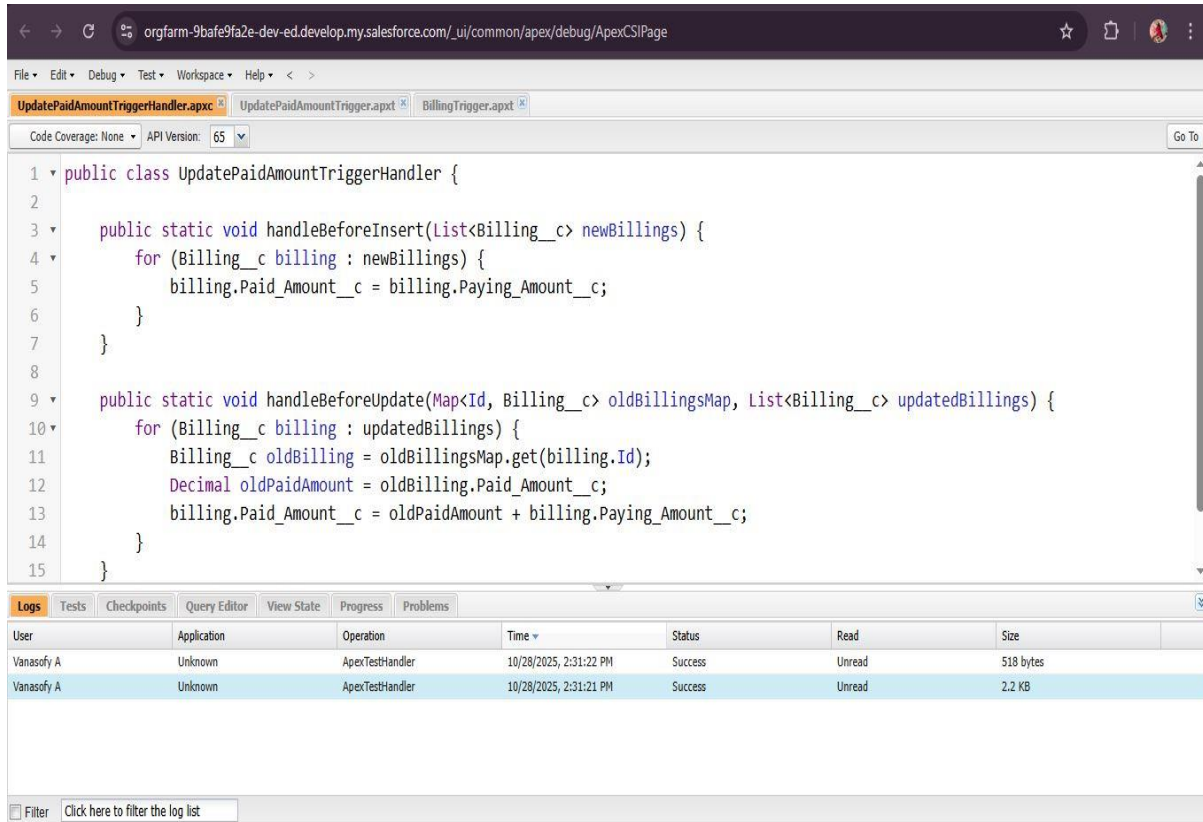


Fig 13.1 Creating apex classes for update paid amount trigger handler

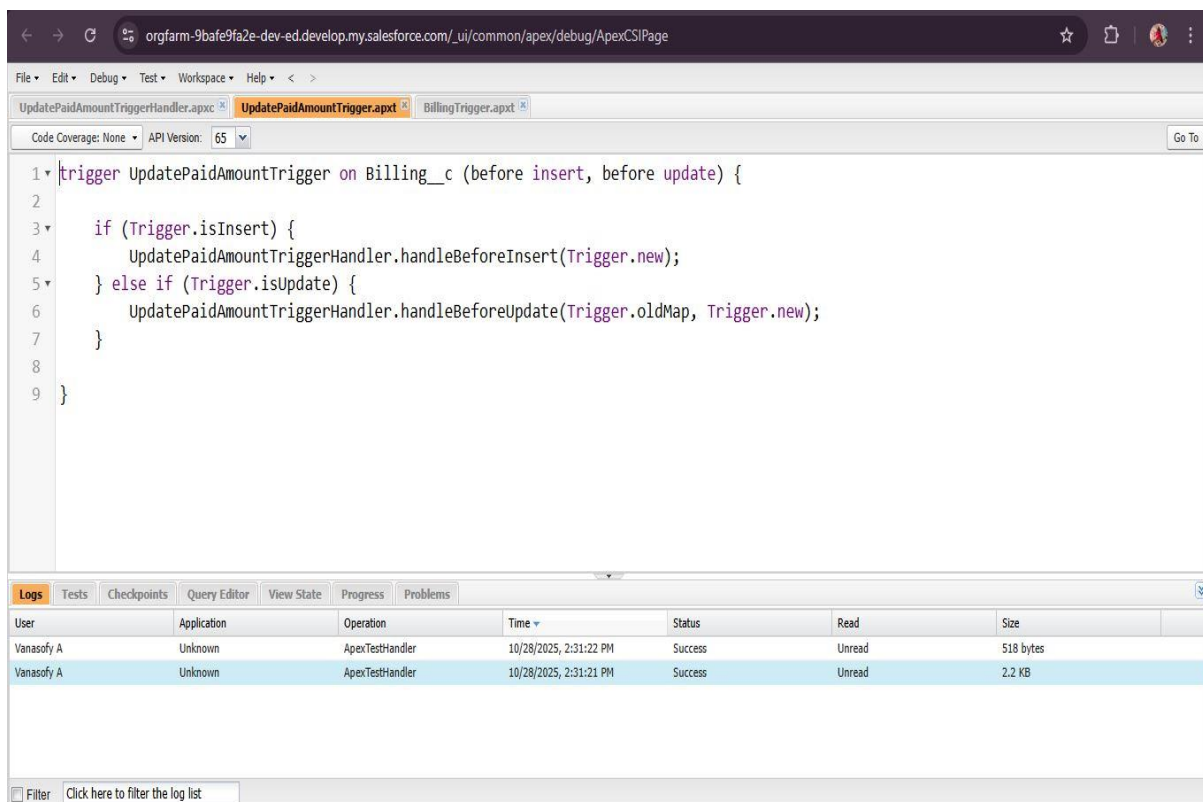


Fig 13.2 Creating apex trigger for update paid amount trigger

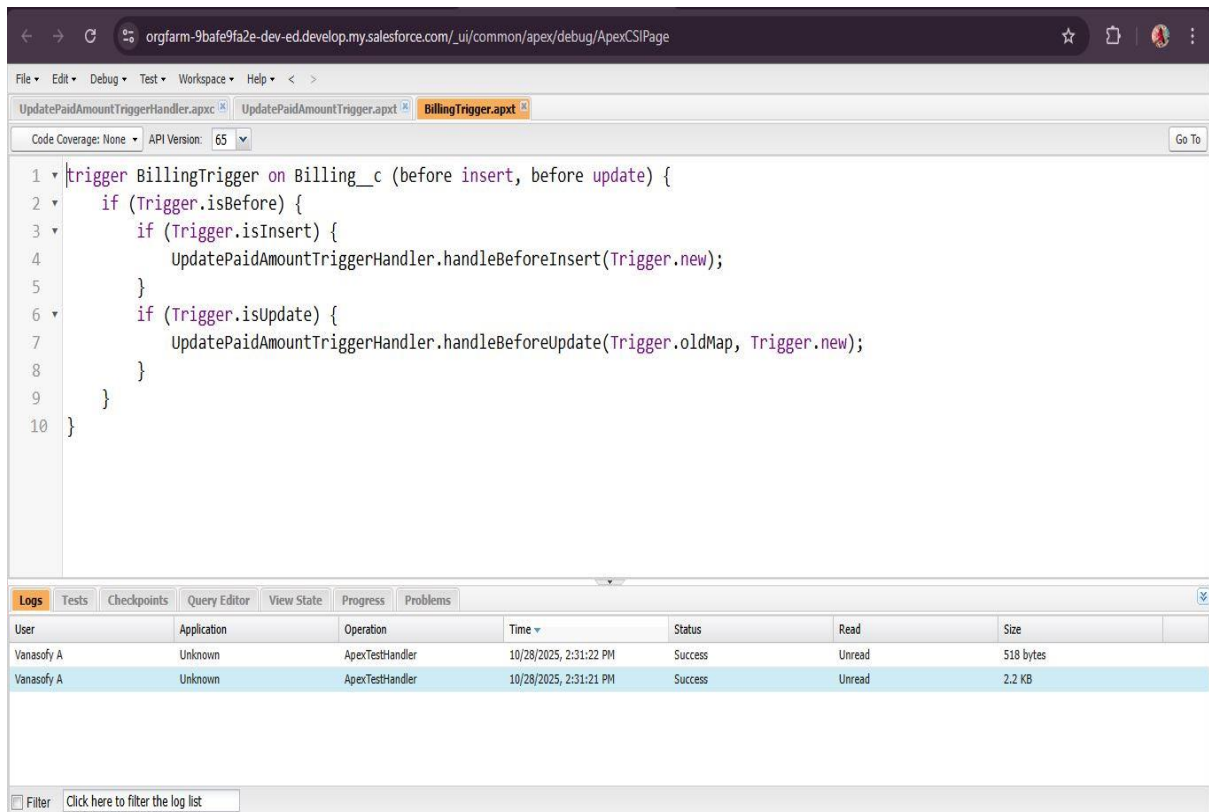


Fig 13.1 Creating apex trigger for billing trigger

## 14. CREATING USER ADOPTION

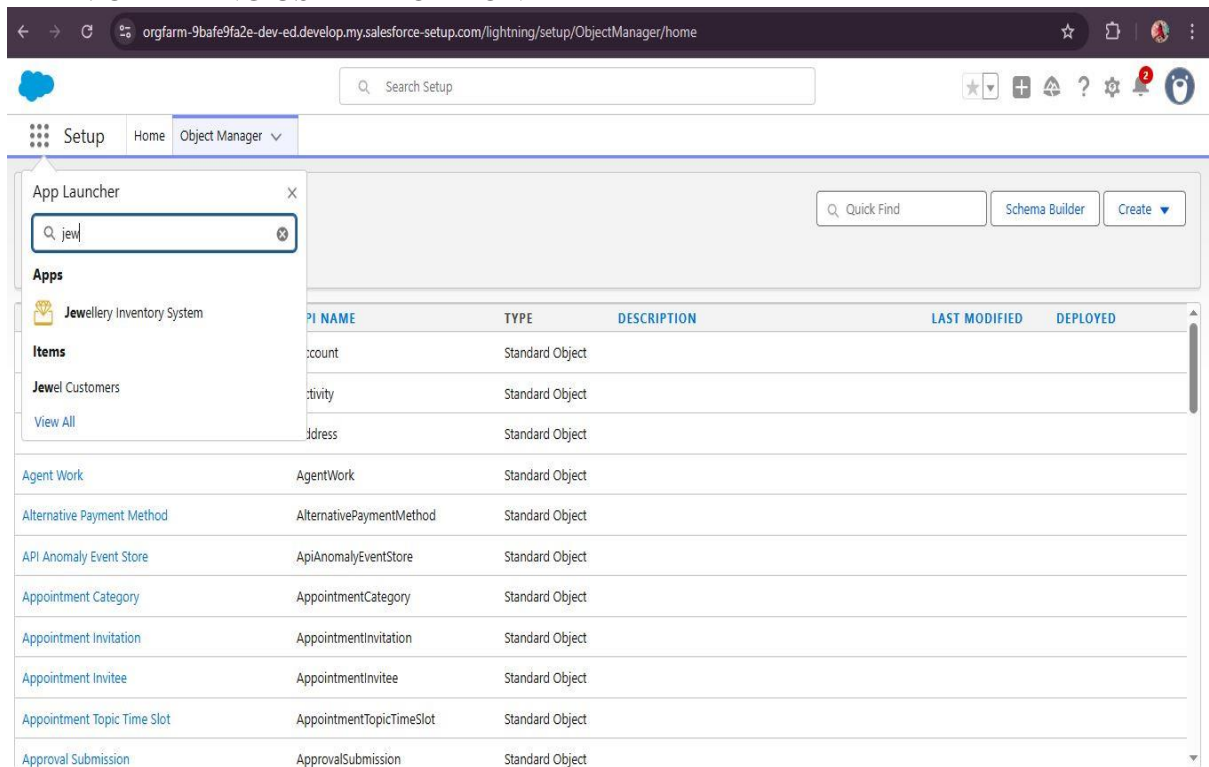


Fig 14.1 Opening the applications

The image displays two screenshots of a Salesforce Lightning interface for a 'Jewellery Inventory System'.

**Top Screenshot: Jewel Customers**

- Page Header:** orgfarm-9baf9fa2e-dev-ed.develop.lightning.force.com/lightning/o/Jewel\_Customer\_c/list?filterName=\_\_Recent
- Page Title:** Jewellery Inventory System
- Tab:** Jewel Customers
- Section:** Recently Viewed
- Buttons:** New, Import, Change Owner, Assign Label
- Search:** Search this list...
- Table:**

Customer Name
1 Marcel Gerard
2 Camille O'Connell
3 Davina Claire
4 Hope Mikaelson
5 Freya Mikaelson
6 Finn Mikaelson
7 Rebekah Mikaelson
8 Elijah Mikaelson
9 Niklaus Mikaelson
10 Kol Mikaelson

**Bottom Screenshot: Items**

- Page Header:** orgfarm-9baf9fa2e-dev-ed.develop.lightning.force.com/lightning/o/Item\_c/list?filterName=\_\_Recent
- Page Title:** Jewellery Inventory System
- Tab:** Items
- Section:** Recently Viewed
- Buttons:** New, Import, Change Owner, Assign Label
- Search:** Search this list...
- Table:**

Item Id
1 Item-04
2 Item-05
3 Item-06
4 Item-07
5 Item-10
6 Item-09
7 Item-08
8 Item-03
9 Item-02
10 Item-01

Fig 14.2 Checking the application's tabs like jewel customers & items where the details are entered

The image displays two screenshots of a web application interface, likely a Salesforce Lightning component, showing different tabs of a 'Jewellery Inventory System'.

**Top Screenshot: Customer Orders**

- Page Header:** 'Jewellery Inventory System' with a 'Customer Orders' tab selected.
- Section Header:** 'Customer Orders' with a 'Recently Viewed' dropdown and a 'New' button.
- Search Bar:** 'Search this list...' with a search icon.
- Table:** A table with 10 rows, each representing an order. The columns are 'Order Id' and a dropdown arrow. The orders are listed from 'Order-10' at the top to 'Order-01' at the bottom.

**Bottom Screenshot: Prices**

- Page Header:** 'Jewellery Inventory System' with a 'Prices' tab selected.
- Section Header:** 'Prices' with a 'Recently Viewed' dropdown and buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'.
- Search Bar:** 'Search this list...' with a search icon.
- Table:** A table with 10 rows, each representing a price. The columns are 'Price Id' and a dropdown arrow. The prices are listed from 'Price-10' at the top to 'Price-01' at the bottom.

Fig 14.3 Checking the application's tabs like customers order & prices where the details are entered

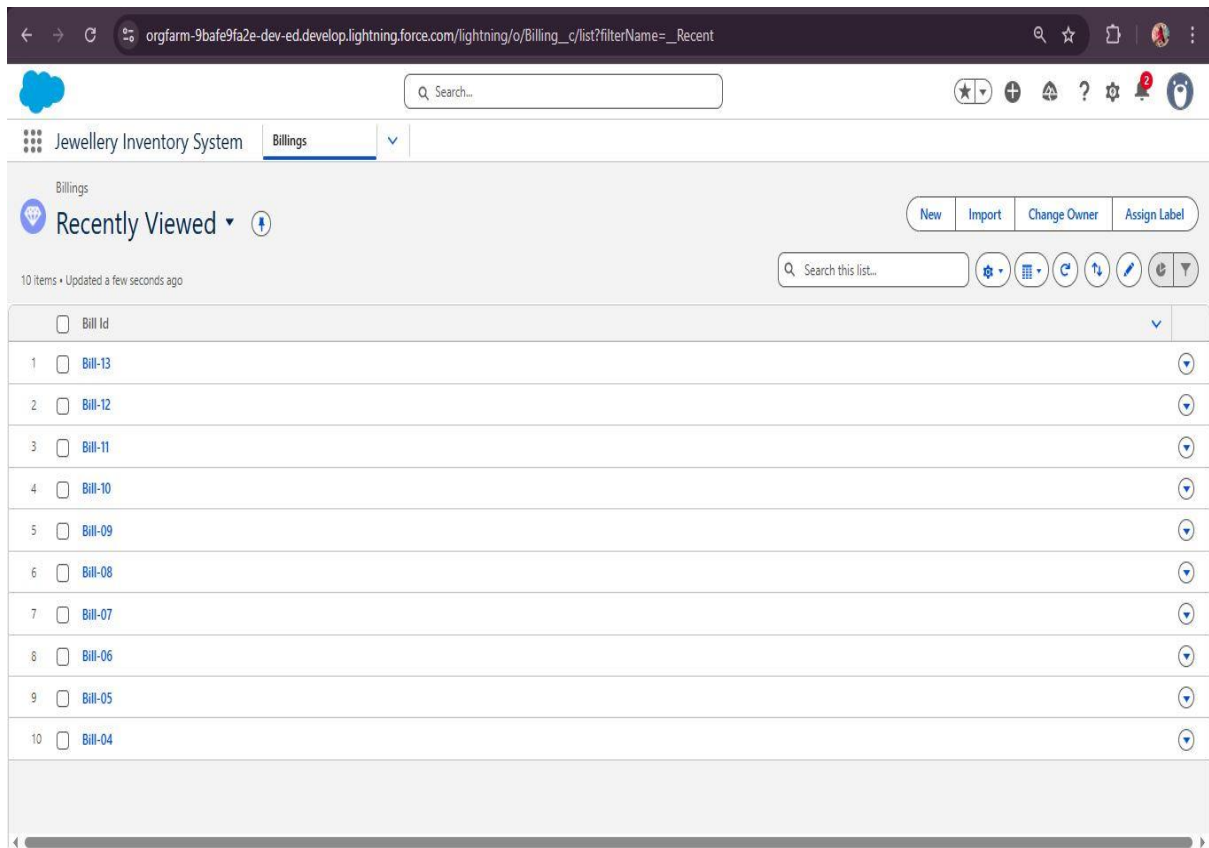


Fig 14.2 Checking the application's tabs like billing where the details are entered

## 15. CREATING A REPORT

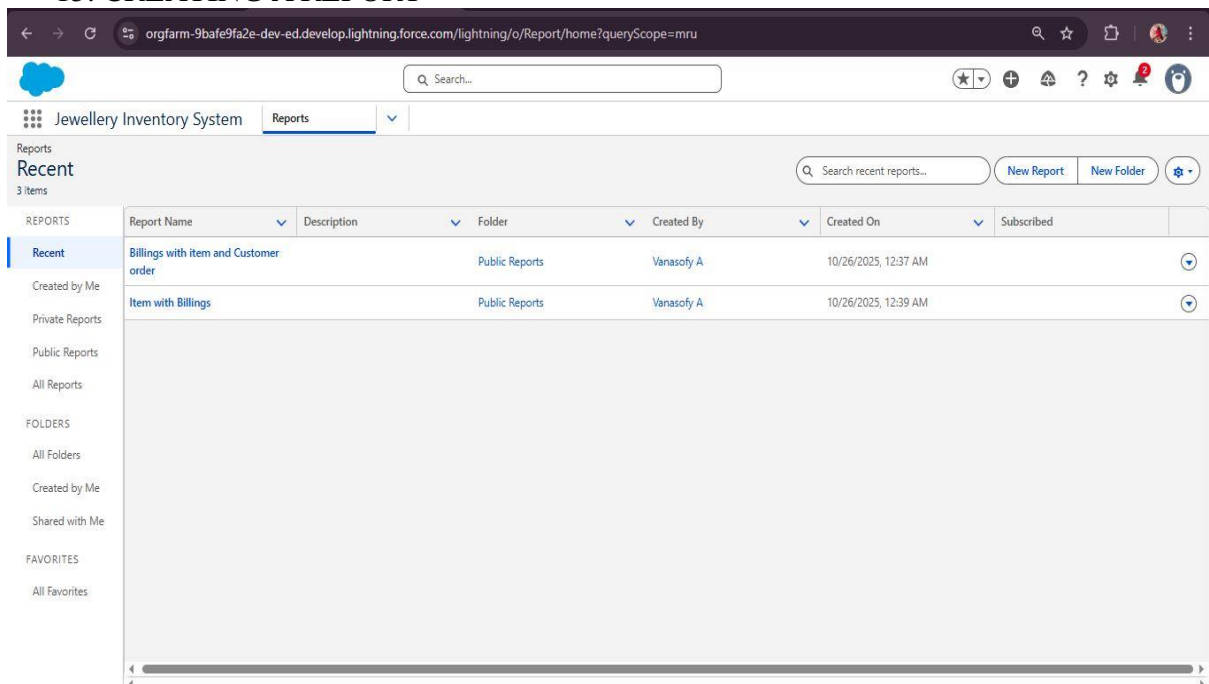


Fig 15.1 Created & assigned the report types

orgfarm-9baf9fa2e-dev-ed.develop.lightning.force.com/lightning/r/Report/00OdL00000Ja8iTUAR/view?queryScope=userFolders

Fig 15.1 Assigned details report

## 16. CREATING A DASHBOARDS

orgfarm-9baf9fa2e-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru

Search...

Jewellery Inventory System Dashboards

Dashboards  
Recent  
1 item

Search recent dashboards... New Dashboard New Folder

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Gold Dashboard		Private Dashboards	Vanasofy A	10/26/2025, 12:43 AM	

Created by Me  
Private Dashboards  
All Dashboards

FOLDERS  
All Folders  
Created by Me  
Shared with Me

FAVORITES  
All Favorites



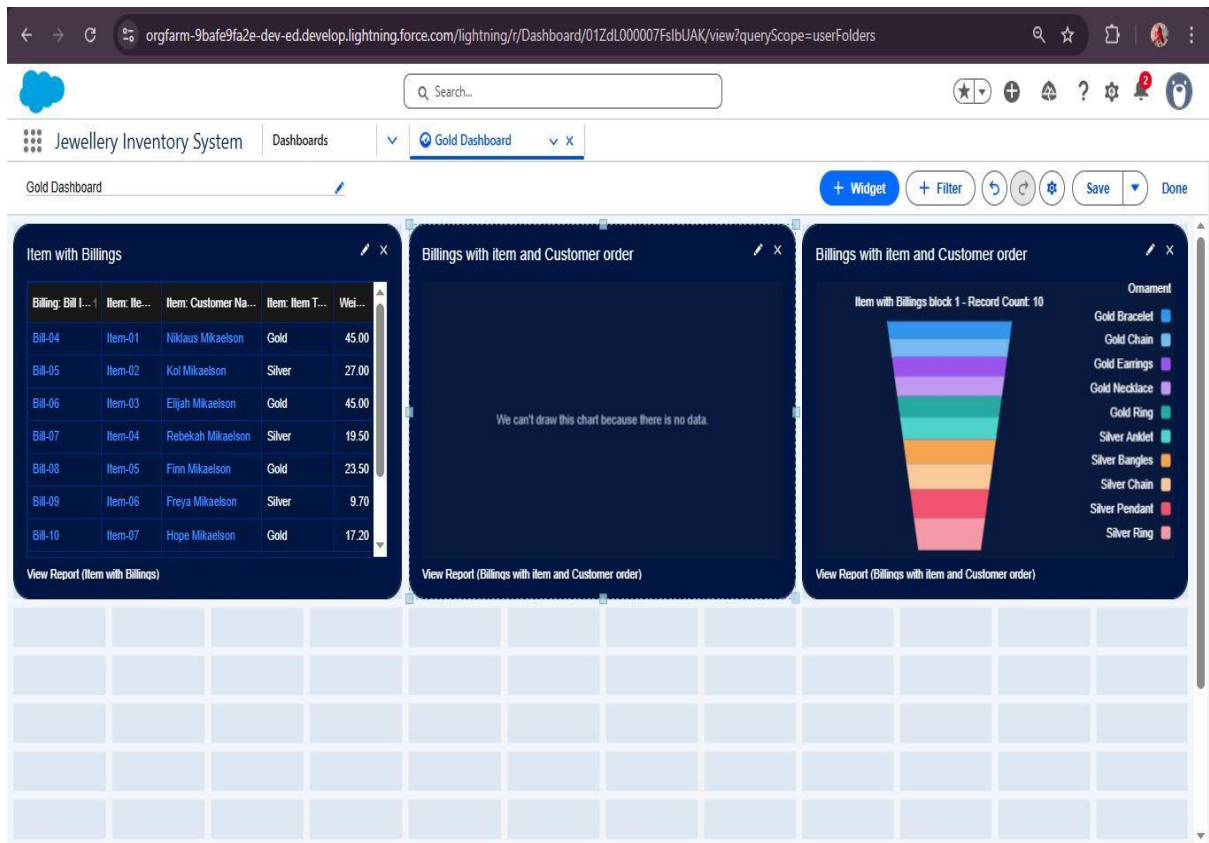


Fig 16.2 CRM application for jewel management-(developer) Dashboard

## 17. CREATING A FLOWS

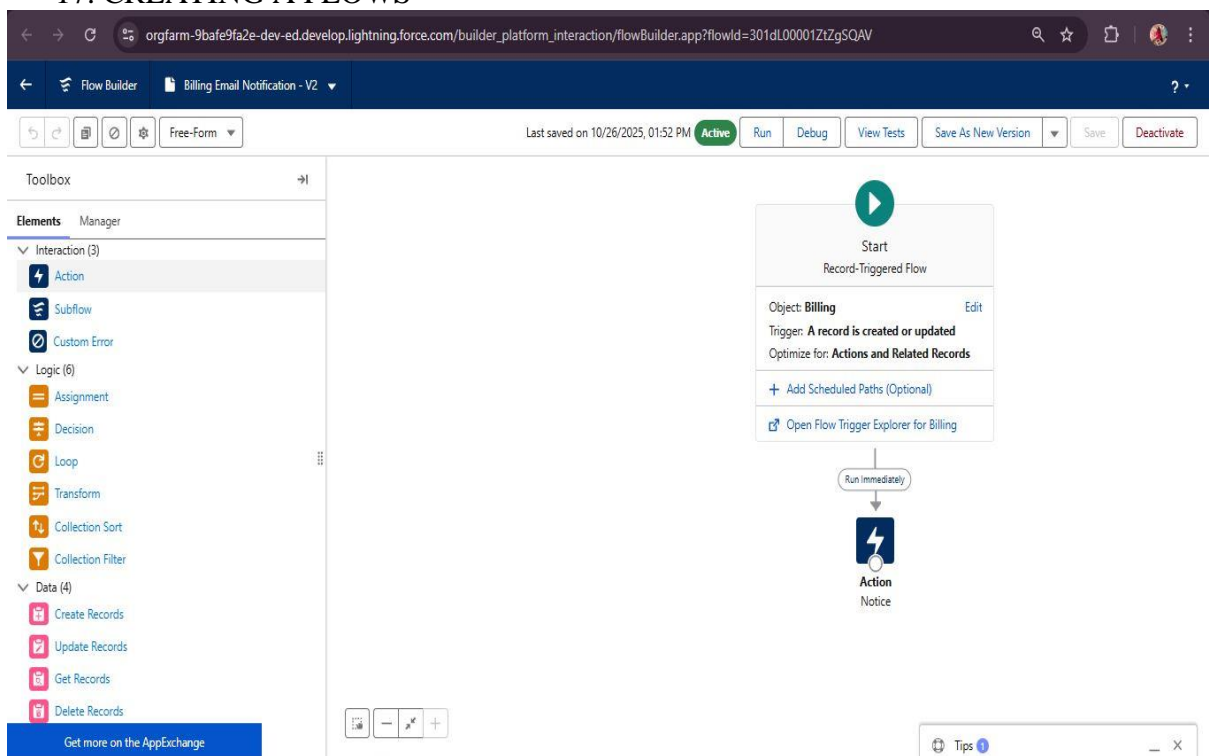


Fig 17.1 Creating flow for billing amount flow with email

## **10. EXPECTED OUTCOMES**

- Efficient management of customer and product data.
- Improved customer satisfaction through timely communication.
- Better business decisions using analytical reports.
- Reduced manual workload and paperwork.
- Enhanced brand loyalty via personalized service.

## **11. ADVANTAGES**

- Centralized management of jewelry and customer information.
- Automation reduces time and human errors.
- Real-time access to sales and customer data.
- Boosts marketing through personalized recommendations.
- Easy scalability and customization.

## **12. FUTURE ENHANCEMENTS**

- Integration with mobile app for customers and staff.
- Implementation of AI-based recommendations for jewelry suggestions.
- Addition of loyalty programs and reward points.
- Chatbot support for instant customer service.
- Integration with payment gateways and invoice automation.



### 13. CONCLUSION

The CRM Application for Jewel Management provides an efficient and modern solution for managing jewelry business operations. It helps store owners build strong customer relationships, track inventory, and improve sales through data-driven strategies. With its modular design and scalability, this system not only simplifies daily tasks but also enhances customer experience. Future upgrades can further transform it into a complete digital platform for jewelry businesses.

### 14. REFERENCES

❖ **Salesforce Developer Documentation:**

<http://salesforce.com/docs>

❖ **Trailhead Modules:**

<https://trailhead.salesforce.com/>

❖ **Salesforce Flow Guide:**

<http://salesforce.com/developer-centers/flow>

❖ **Apex Developer Guide:**

[http://salesforce.com/docs/atlas.en-us.apexcode.meta/apexcode/apex\\_dev\\_guide.htm](http://salesforce.com/docs/atlas.en-us.apexcode.meta/apexcode/apex_dev_guide.htm)

❖ **Lightning Web Components Documentation:**

<http://salesforce.com/docs/component-library/overview/components>