CRM APPLICATION FOR JEWEL MANAGEMENT

(DEVELOPER)

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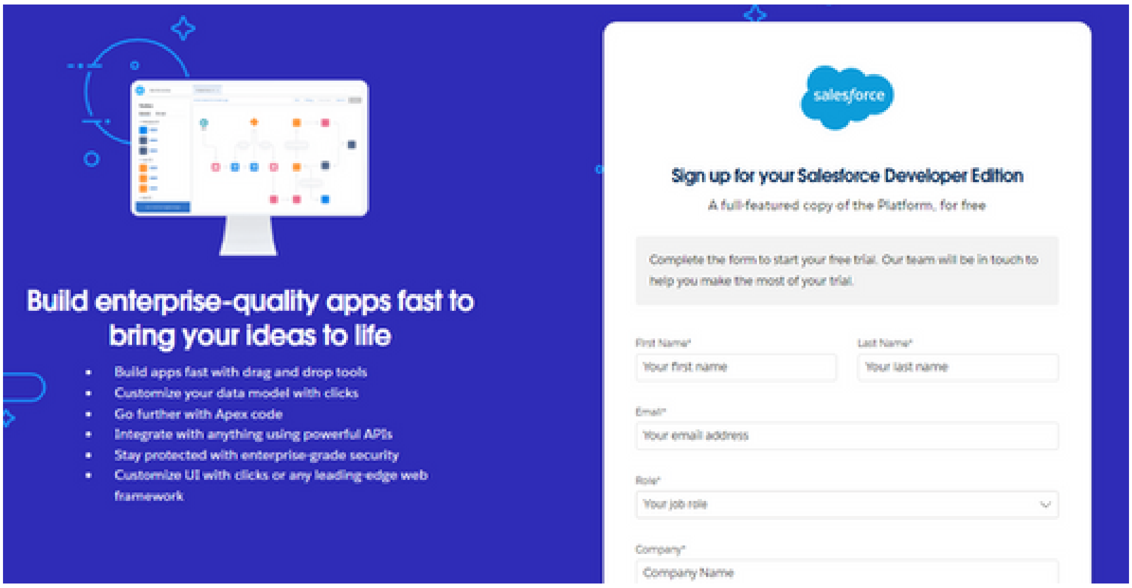
INTRODUCTION

A CRM (Customer Relationship Management) application for jewel management helps jewellery businesses manage customer interactions, streamline sales, and track inventory. It stores detailed customer profiles, tracks orders, and offers personalized recommendations based on preferences. The system integrates inventory management, sales reporting, and communication tools (e.g., automated alerts, loyalty programs). It also enables secure transactions, efficient order processing, and data-driven decision-making, enhancing customer satisfaction and business operations.

Creating Developer Account

- Go to https://developer.salesforce.com/signup for creating developer account.
-

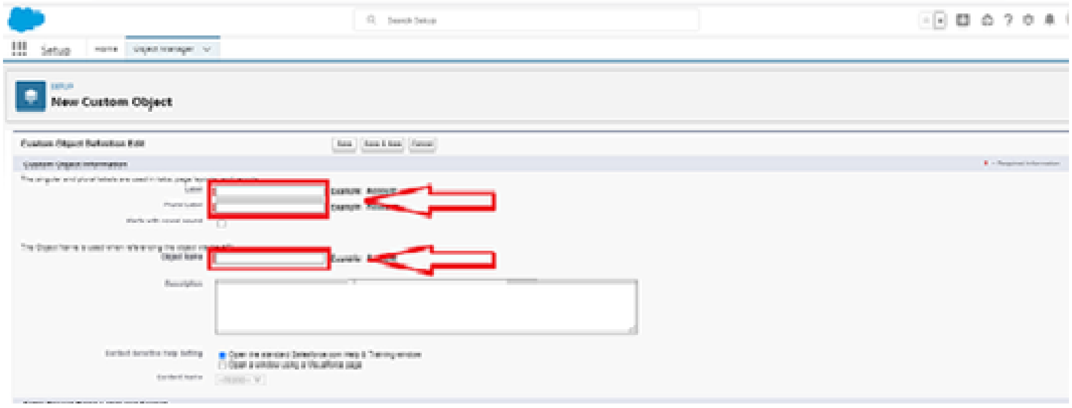


Create jewel customer object

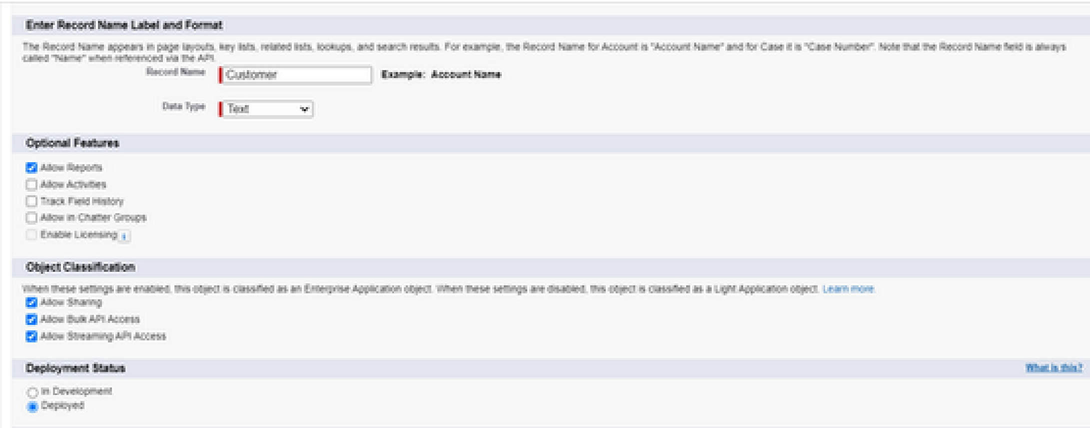
1. Click on object manager
2.
3. Click on create and click on custom object

4.

- Enter the label name : Jewel Customer
-
- Plural label name : Jewel Customers
-



- Record name = Customer name
-
- Data type = Text
-



Create item object

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
2.

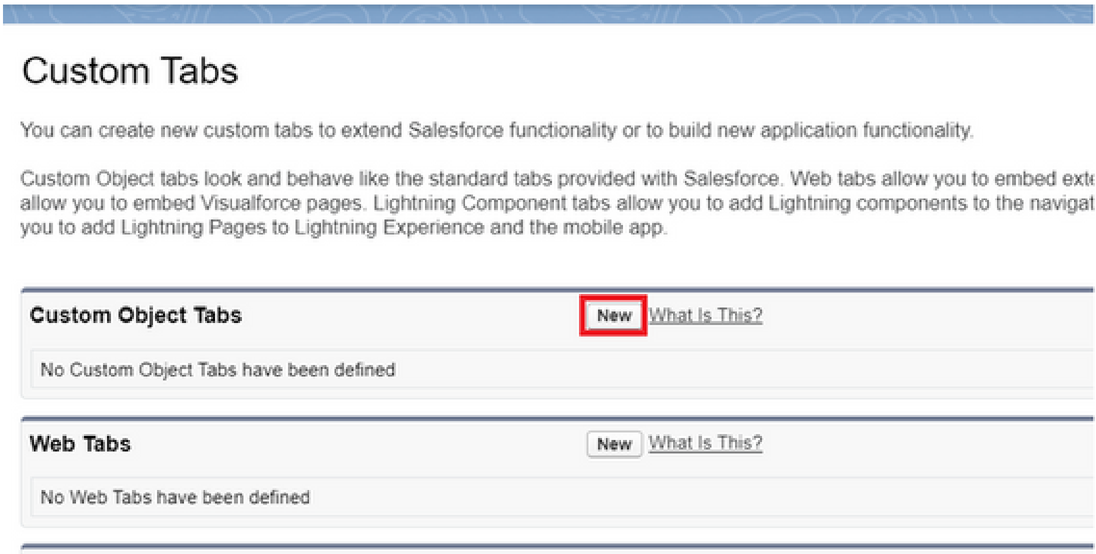
- Enter the label name >> Item
-
- Plural label name >> Items
-
- Enter Record Name Label and Format
-
- Record Name >> Item Id
-
- Data Type >> Auto Number
-
- Display Format >> Item-{00}
-

- Starting Number >> 1
-

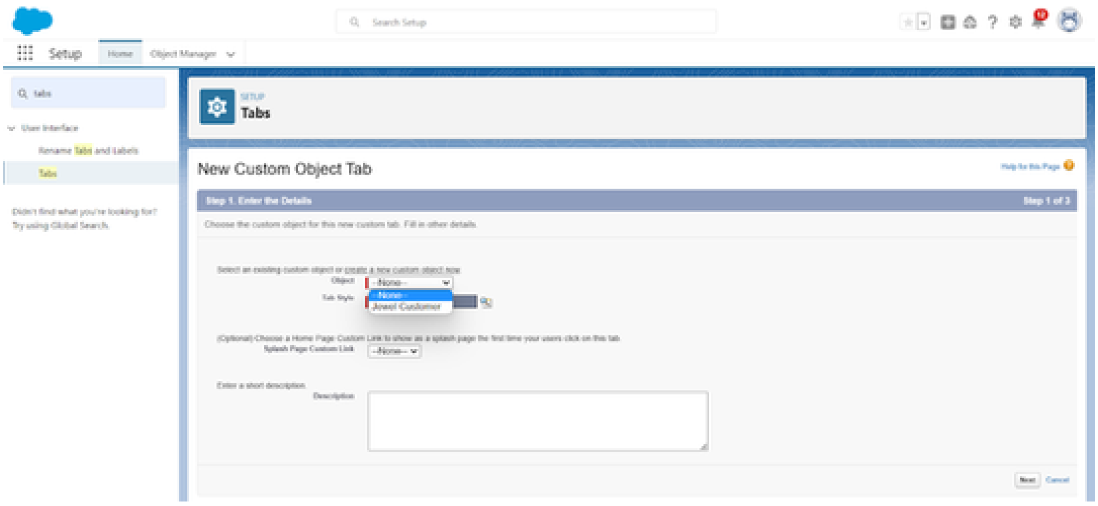
3. Click on Allow reports.
4.
5. Allow search >> Save.
6.

Creating a Custom Tab

- Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
-



- Select Object(Jewel Customer) >> Select any tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) keep it as default >> Save.
-



To create a tab: (item)

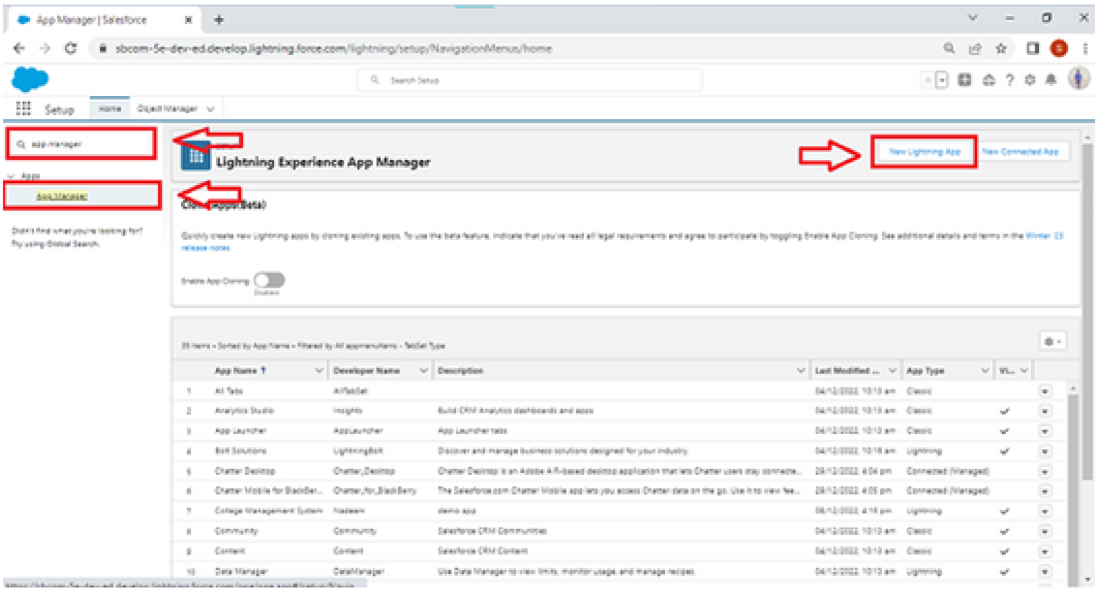
- Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
-
- Select Object(Item) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) keep it as default >> Save.
-

And also create tabs for:

Customer Order, Price, Billing objects.

Create A lightning app

- Go to setup page >> search “app manager” in quick find >> select “app manager
-

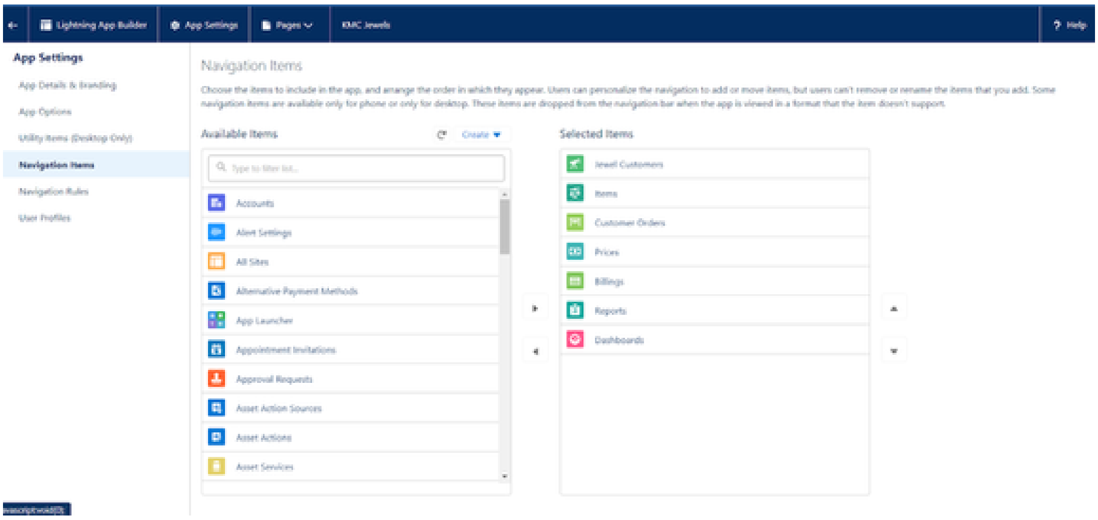


Fill the app name in app details and branding as follow

App Name : Jewellery Inventory System.Developer Name : This will auto populatedDescription : Elevate your look with elegancePrimary colour hex value : keep this default.

And add the navigation items:

JewelCustomer, Item, Customer Order, Price, Billing, Reports, Dashboard



And save & finsh.

Fields

Creating lookup Relationship

1. Go to the setup page >> click on object manager >> type object name (Customer Order) in the quick find bar >> click on the object.
2.
3. Click on fields & relationship >> click on New.
4.
5. Select “Lookup relationship” as data type and click Next.
6.

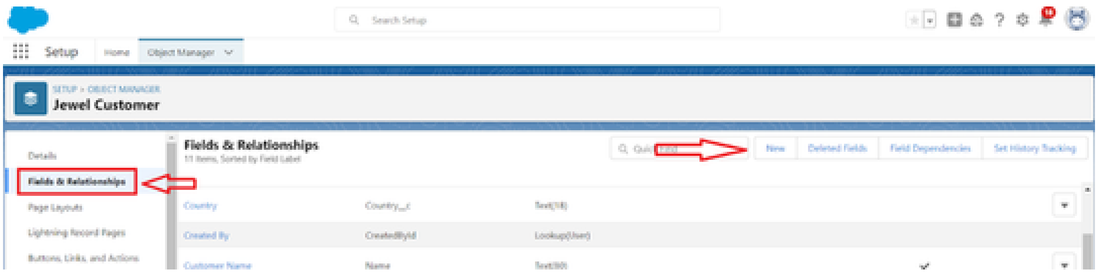
7. Select the related object “ Jewel Customer ”.
8.
9. Give Field Label as “Customer” and click Next.
10.
11. Next >> Next >> Save
12.

Creating a Master-Detail Relationship

- Go to the setup page >> click on object manager >> type object name (Customer Order) in the quick find bar >> click on the object.
-
- Click on fields & relationships >> click on New.
-
- Select “Master-Detail relationship” as data type and click Next .
-
- Select the related object “ Item”.
-
- Give Field Label as “Item” and click Next.
-
- Next >> Next >> Save.
-

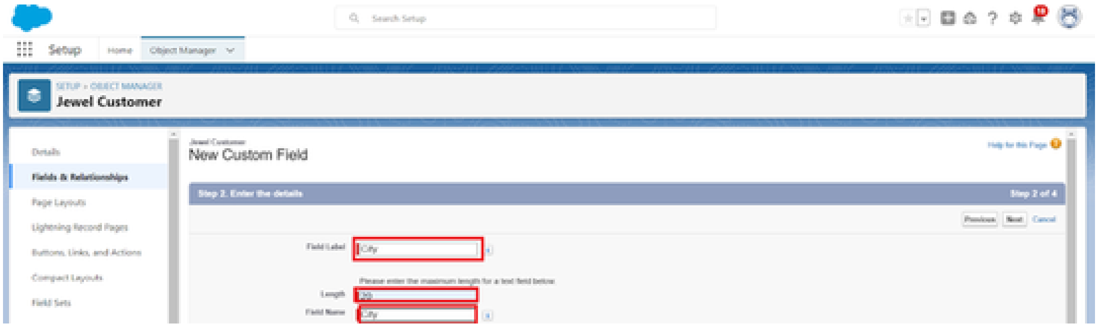
Creating Text Field in Jewel Customer Object

- Go to setup >> click on Object Manager >> type object name (Jewel Customer) in quick find bar >> click on the object.
-
- Now click on “Fields & Relationships” >> New
-



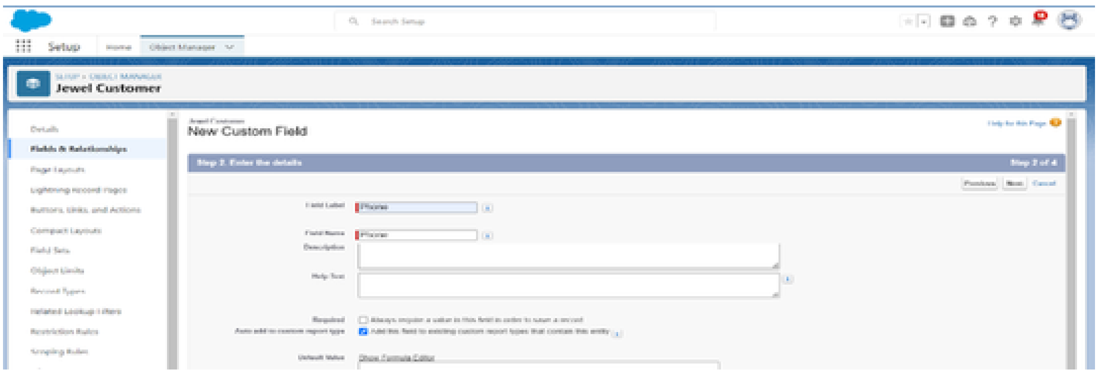
Fill the above as following:

- Field Label: City
-
- Length : 20
-
- Field Name : gets auto generated
-
- Click on Next >> Next >> Save and new.
-



Creating the Phone field in object Jewel Customer

1. Go to setup >> click on Object Manager >> type object name (Jewel Customer) in quick find bar >> click on the object.
2.
3. Now click on “Fields & Relationships” >> New
4.
5. Select Data type as “Phone” and click Next .
6.
7. Given the Field Label as “ Phone ”.
8.
9. And save.
10.



Creating the Email field in object Jewel Customer

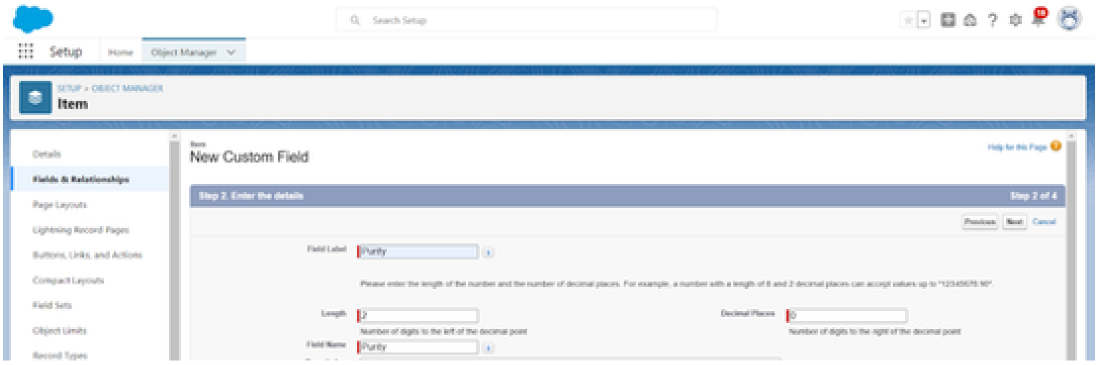
To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Jewel Customer) in quick find bar >> click on the object.
2.
3. Now click on “Fields & Relationships” >> New
4.
5. Select Data type as “Email” and click Next.
6.
7. Given the Field Label as “ Email”.
8.
9. Field Name will be auto populated, and click on Next >> Next >> Save.
10.

Creating the number field in Item object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
2.
3. Now click on “Fields & Relationships” >> New
4.
5. Select Data type as “Number” and click Next.
6.
7. Given the Field Label as “ Purity” and length as “ 2 ”.
8.
9. And save.
10.

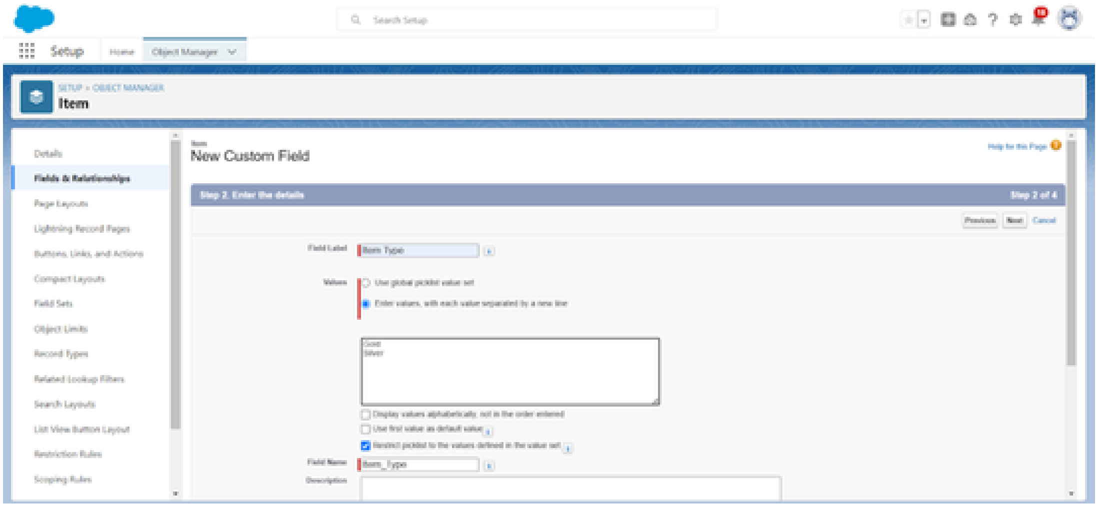


Creating Picklist Field in Item Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar>> click on the object.
2.
3. Now click on “Fields & Relationships” >> New.
4.
5. Select Data type as “Picklist” and click Next.
6.
7. Enter Field Label as “Item Type”.
8.
9. In values select “Enter values(Gold,Silver), with each value separated by a new line" and enter values as shown below.
10.

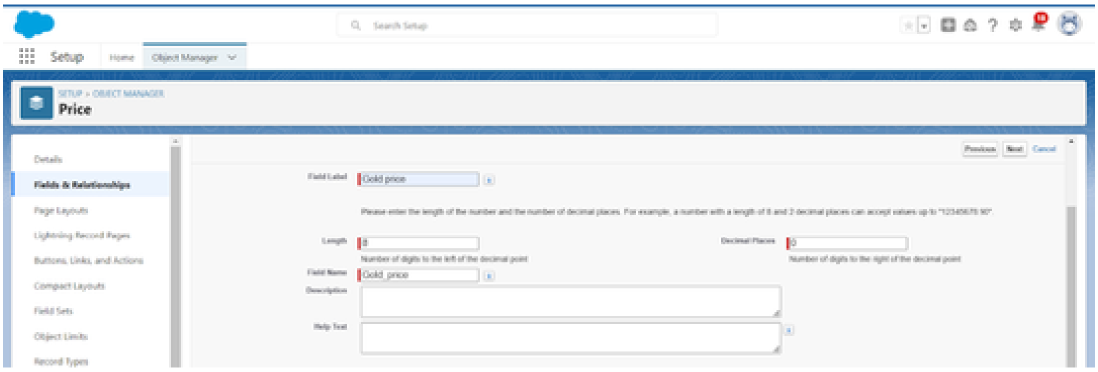
11. And save.
12.



Creating Currency Field in Price Object

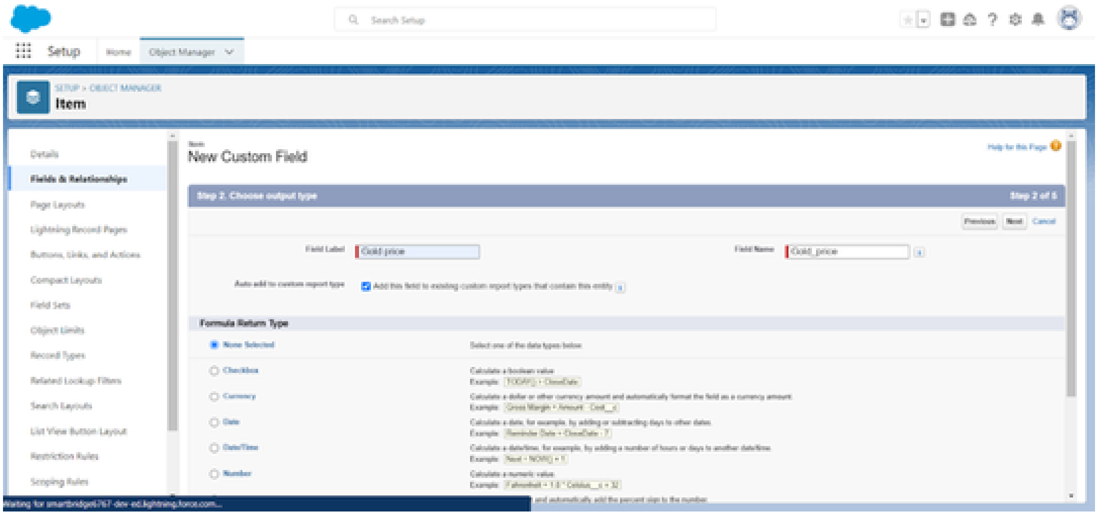
To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Price) in quick find bar >> click on the object.
2.
3. Now click on “Fields & Relationships” >> New.
4.
5. Select Data type as “Currency” and click Next
6.
7. And save.
8.



Creating Formula Field(Cross Object) in Item Object

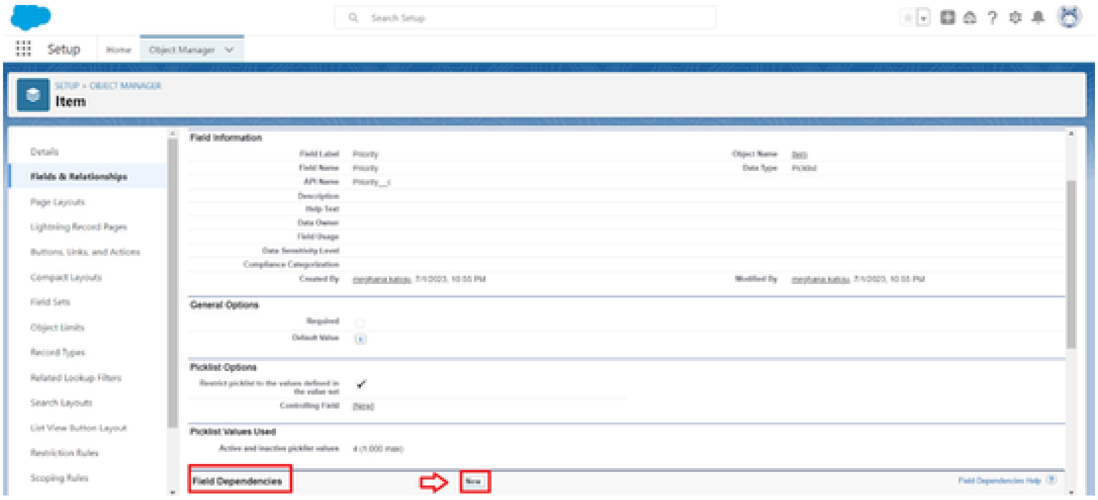
1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar? click on the object.
2.
3. Now click on “Fields & Relationships” >> New.
4.
5. Select Data type as “Formula” and click Next.
6.
7. Give Field Label and Field Name as “Gold Price” and select formula return type as “Currency” and click next.
8.
9. And save.
10.



Creating the Field Dependencies

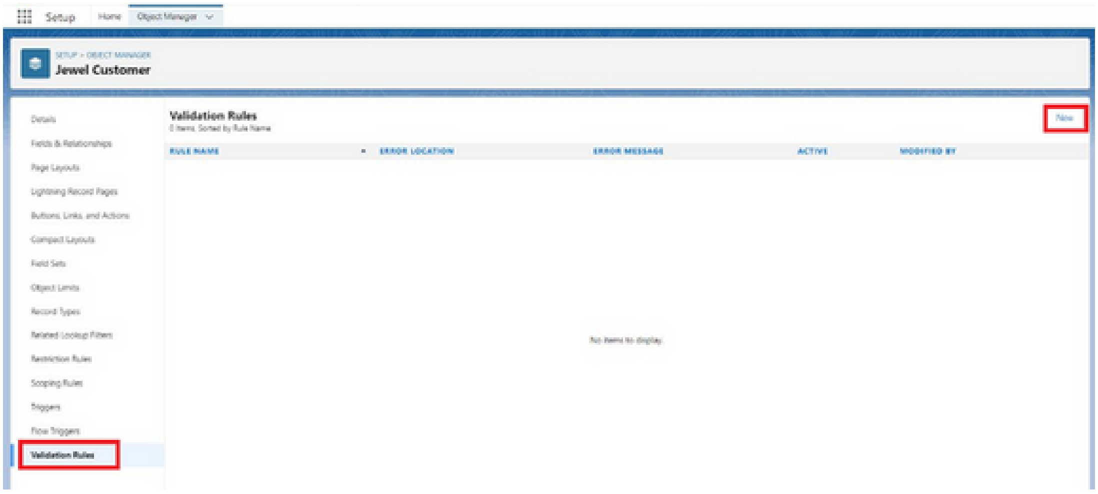
Field Dependencies are used to create relationships between fields within an object. They allow you to control the visibility and availability of fields based on the values selected in other fields.

1. Go to setup >> click on Object Manager >> type object name(Item) in quick find bar >> click on the object.
2.
3. Click on Fields & Relationships and click on the Priority field.
4.
5. Search for Field Dependencies and click on New.
6.
7. And save.
8.



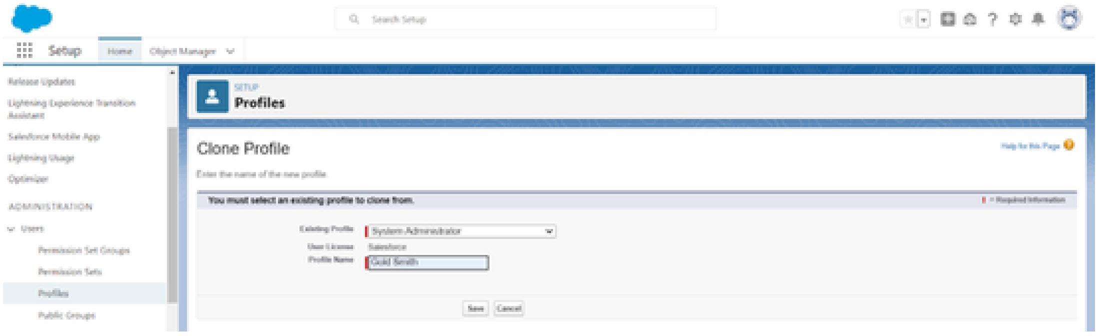
Creating the validation rule

1. Go to setup >> click on Object Manager >> type object name(Jewel Customer) in quick find bar>> click on the object.
2.
3. Click on the validation rule >> click New.
4.
5. Enter the Rule name as “Postal Code “.
6.
7. Insert the Error Condition Formula as : -AND(OR(LEN(Zip_Postal_code__c) <> 6, NOT(REGEX(Zip_Postal_code__c, "^[0-9]{6}$"))), NOT(ISBLANK(Zip_Postal_code__c))   ))
8.
9. And save.
10.



Gold Smith Profile

1. Go to setup >> type profiles in quick find box >>click on profiles ? clone the desired profile (System Administrator) >> enter profile name (Gold Smith) >> Save.
2.
3. While still on the profile page, then click Edit.
4.
5. Scroll down to Custom Object Permissions and Give access permissions for Jewel Customer,Item,Customer order , prices, billing.
6.

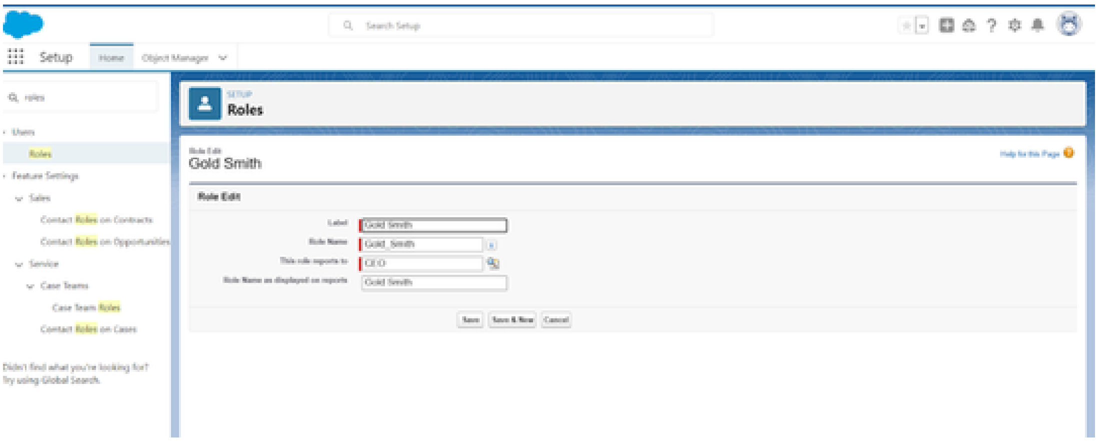


Worker Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Salesforce Platform User) >> enter profile name () >> Save.
2.
3. While still on the profile page, then click Edit.
4.
5. Scroll down to Custom Object Permissions and Give access permissions for Items, Price and Customer Order objects.
6.
7. Scroll down and Click on Save.
8.

Creating Gold Smith Role

- Label = Gold smith
-
- Role name = gold_smith
-



Create User

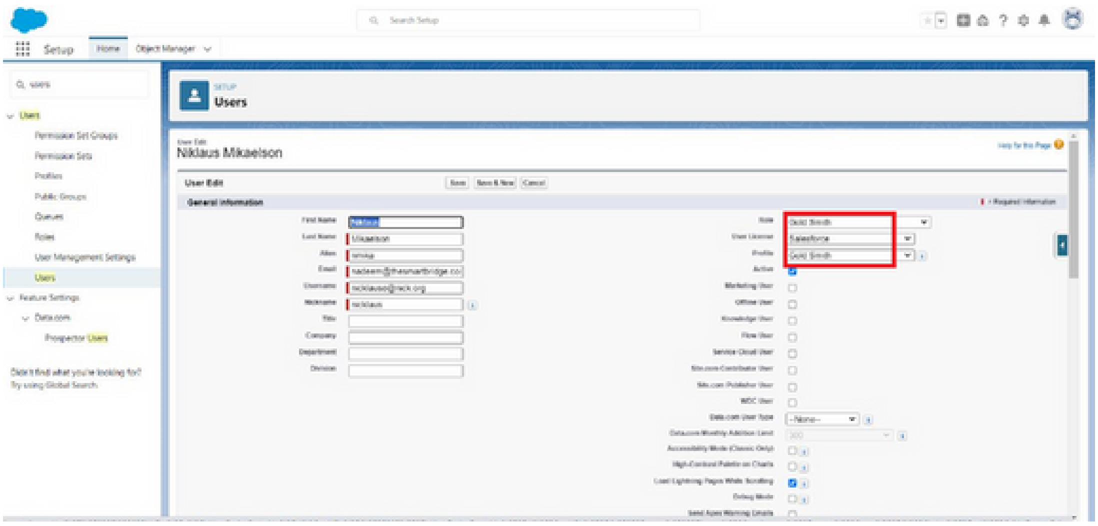
Go to setup >> type users in quick find box >> select users >> click New user.

Fill in the fields

1. First Name: Niklaus
2.
3. Last Name: Mikaelson
4.
5. Alias: Give a Alias Name
6.
7. Email id: Give your Personal Email id
8.
9. Username: Username should be in this form: text@text.text
10.

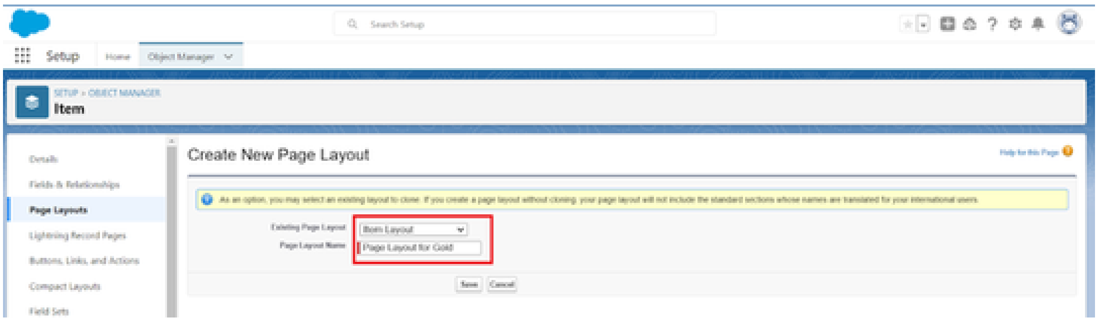
11. Nick Name: Give a Nickname
12.
13. Role: Gold Smith
14.
15. User licence: Salesforce
16.
17. Profiles: Gold Smith
18.

And save.



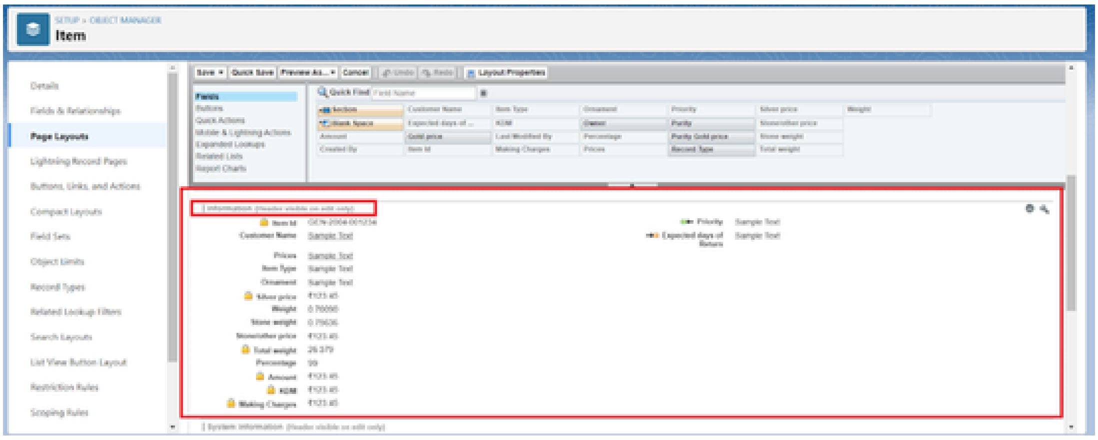
To Create a Gold Page layout

1. Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.
2.
3. Click on Page layout >> Click on New.
4.
5. Give Page layout Name as “Page Layout for Gold” and click on Save and New
6.
7. Arrange the field as shown in the Information Section ,remove fields which are related to Silver and click Ok
8.
9. And save
10.



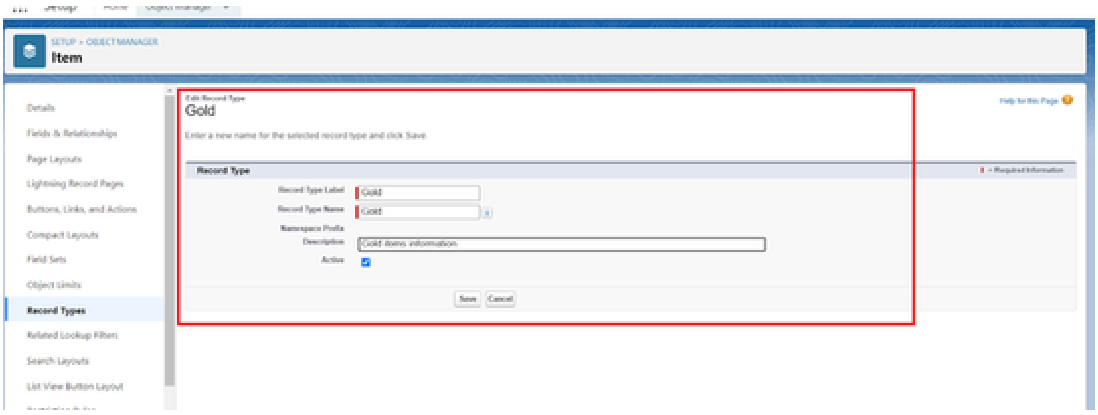
To Create a Silver Page layout

1. Go to Setup >> Click on Object Manager >> Search for the object (Item) >> From drop down click on Edit.
2.
3. Click on Page layout >> Click on New.
4.
5. Give Page layout Name as “Page Layout for Silver” and click on Save.
6.
7. Arrange the field as shown in the Information Section ,remove fields which are related to Gold and click Ok.
8.



To create a Record Type

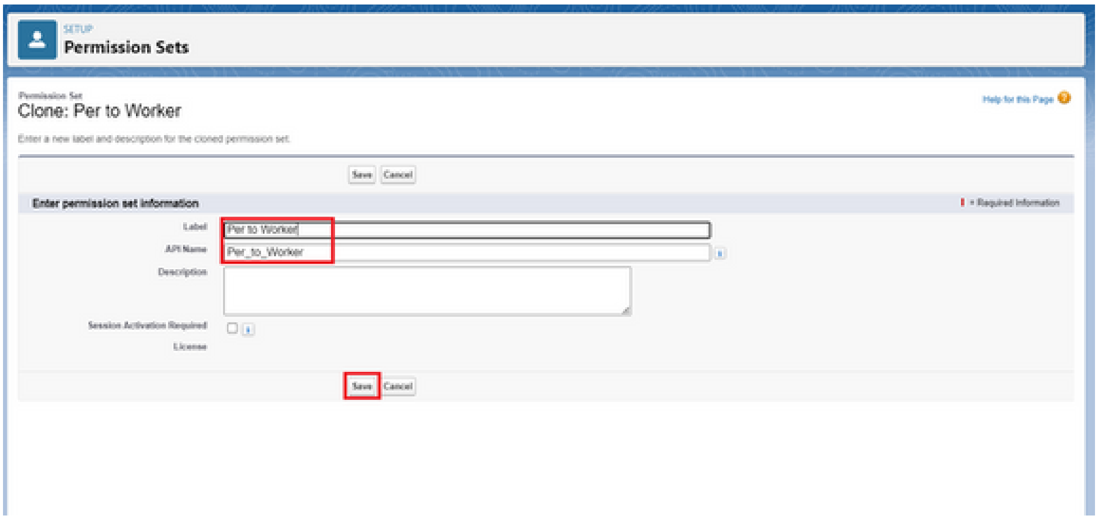
1. Go to setup >> click on Object Manager >> type object name (Item) in quick find bar click on the object.
2.
3. Click on the Record Types >> click New.
4.
5. Select Existing Record as “Master”,Record type Label as “Gold”,Description as “Gold items information”
6.
7. roll down and check for the Gold Smith,Worker JW & System Administrator profile and click on Next
8.
9. Select “Apply a different layout for each profile”, and change page layout to “Page Layout for Gold“for Gold Smith, Worker and system administrator. Save and new.
10.



Creating permission set

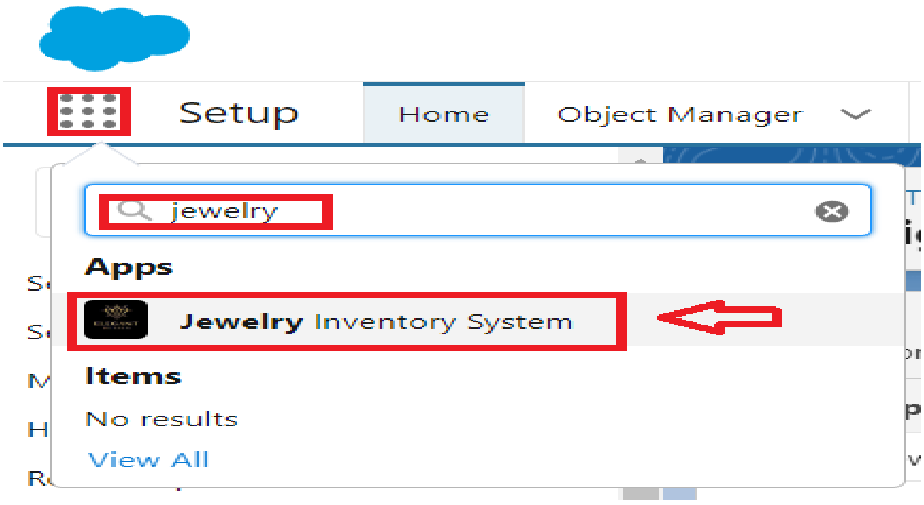
- Go to setup >> type “permission sets” in quick search >> select permission sets >> New
-
- Enter the label name as “Per to Worker”, API will be auto populated? Save.
-
- Lick on Items object? Click on Edit ? Under Item: Record Type Assignments, enable Gold, Silver? Object permission check for read, edit and create.
-
- Click on Save.
-
- After saving the permission click on the Manage assignment
-
- Now click on the Add Assignment.
-
- Now select the users which you have created in user milestone, using Worker profile and click on Next? Assign? Done

-



Create a Record (Jewel Customer)

1. Click on App Launcher on the left side of the screen.
2.
3. Search Jewellery Inventory System & click on it
4.
5. Click on Drop Down and Click on the Jewel Customer tab
6.
7. Click new
8.
9. Fill the Details and click on Save
10.



View a Record (Jewel Customer)

1. Click on App Launcher on the left side of the screen.
2.
3. Search Jewellery Inventory System & click on it.
4.
5. Click on the Jewel Customer Tab.
6.
7. Click on any record name. You can see the details of the Jewel Customer.
8.

Delete a Record (Jewel Customer)

1. Click on App Launcher on the left side of the screen.
2.
3. Search Jewellery Inventory System & click on it.
4.
5. Click on the Jewel Customer Tab.
6.
7. Click on Arrow at right hand side on that Particular record.
8.
9. Click delete.
10.

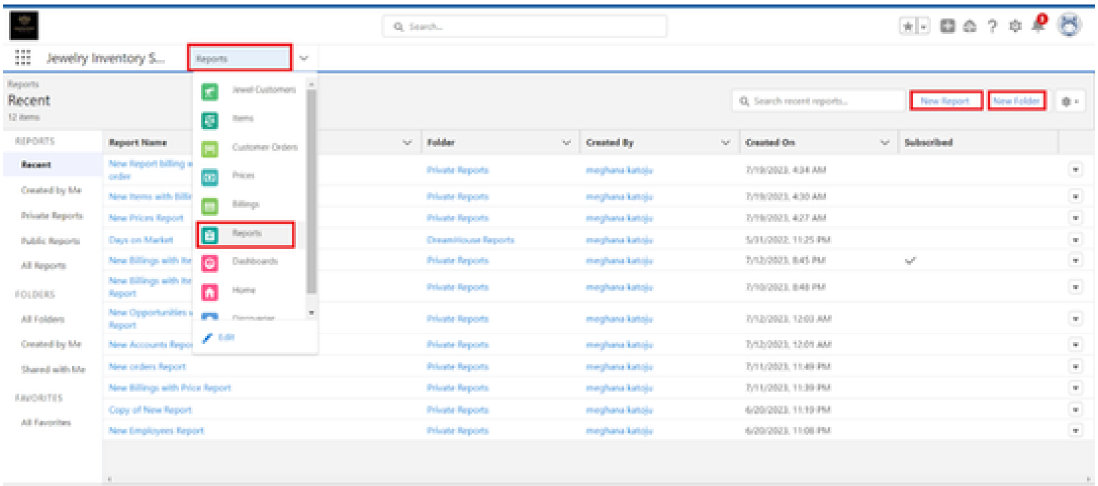
Create Report

Go to the app >> click on the reports tab

- Click New Report
-
- Select report type from category or from report type panel or from search panel? Click on start report.
-
- Customise the report.
-

Add fields from the left pane as shown below

- Save or run it
-

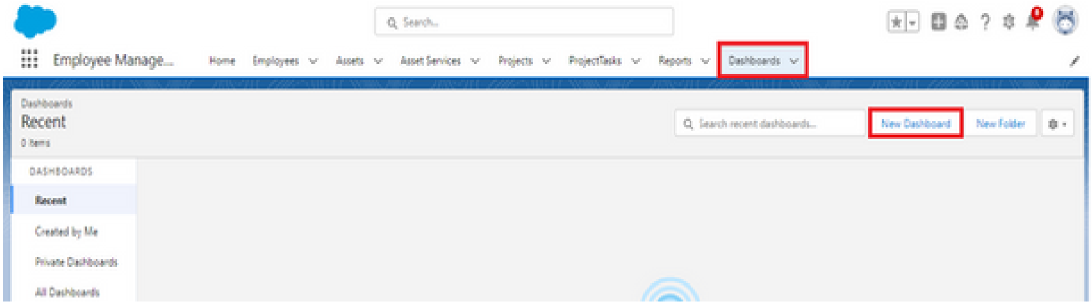


Reports

1. Create a report with report type: “Item with Billings”.
2.
3. Create a report with report type: “Billings with item and Customer order”
4.

Create Dashboard

1. Go to the app >> click on the Dashboards tabs.
2.
3. Give a Name and click on Create.
4.
5. elect a Report and click on select
6.
7. Click Add then click on Save and then click on done.
8.



Create a Flow

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow
2.
3. select the Record-triggered flow and Click on Create
4.
5. Select the Object as a “Billing” in the Drop down list.
6.
7. Select the Trigger Flow when: “A record is Created or Updated”.
8.
9. Select the Optimise the flow for: “Actions and Related Records” and Click on Done
10.
11. Now change the mode form Auto-layout to free-form.
12.
13. Now select the manger option in the toolbox, click new resource.
14.
15. Select the resource type as text template
16.
17. Enter the API name as “ Email body”
18.
19. Change the view as Rich Text? View to Plain Text.
20.
21. In the body field paste the syntax that is given below.
22.

Hello

Customer Name: {! $Record.Item__r.Customer_Name__Renamed}

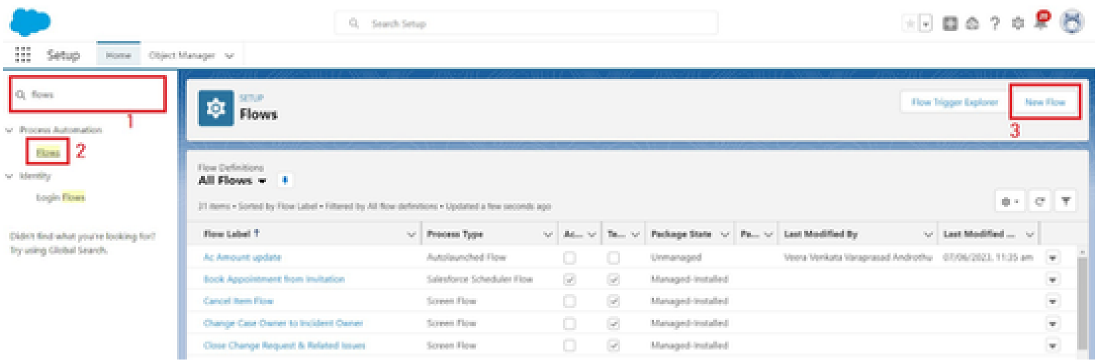
Here are the details for the item you purchased with Jewellery Inventory System

Item Type: {! $Record.Item__r.Item_Type__c}

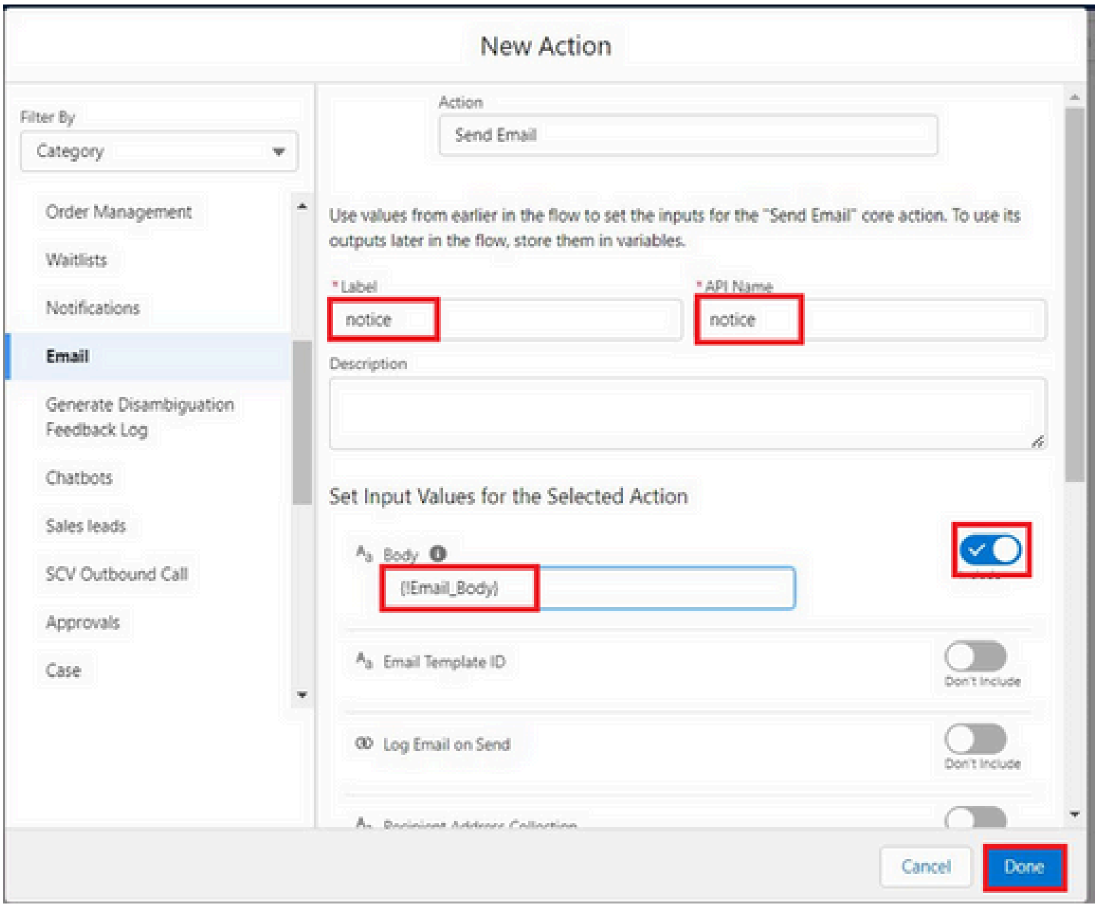
Ornament: {! $Record.Ornament__c}

Weight: {!$Record.Weight__c}grams

Amount: {!$Record.Amount__c}



1. Click done.
2.
3. Now click on elements, and drag the action element into the preview pane.
4.
5. Their action bar will be opened in that search for “send email” and click on it.
6.
7. Give the label name as “ notice”
8.
9. API name will be auto populated.
10.
11. Enable the body in set input values for the selected action.
12.
13. Select the text template that was created
14.

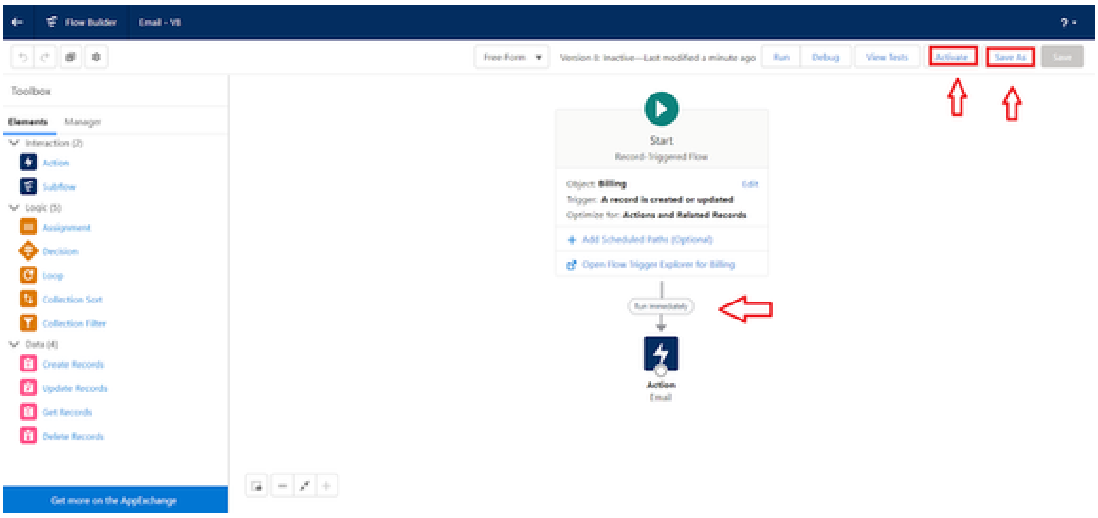


1. Include Recipient Address list, select the email form the record.
2.

({! $Record.Item_r.Customer_Namer.Email_c})

1. Include the subject as “Welcome to Jewellery Inventory System”.
2.
3. Click done.
4.
5. Now drag the path from the start to the action element.
6.
7. Click on save. Given the Flow label, Flow Api name will be auto populated.
8.

9. And click save, and click on activate
10.



Thank you