**Project Design Phase**

**Problem – Solution Fit Template**

|  |  |
| --- | --- |
| Date | 22 June 2025 |
| Team ID | LTVIP2025TMID30852 |
| Project Name | Jewelry Inventory Management System using Salesforce |
| Maximum Marks | 2 Marks |

**Problem – Solution Fit Template:**

The Problem–Solution Fit means you have identified a real problem faced by your customer and designed a solution that effectively addresses it. This step helps project teams, innovators, and developers focus on user needs, behaviors, and priorities.

**Purpose:**

* Solve real-world problems that impact store admins and goldsmiths.
* Ensure better adoption by aligning your solution with the actual working habits of users.
* Improve communication by targeting key user frustrations.
* Build trust through automation and accurate data.
* Analyze current issues to create a role-based, validated, and efficient system.

**Template:**

Calendar

Description automatically generated

🧩 Customer Discovery Sheet – Jewel Inventory Management System

1. 🔹 CUSTOMER SEGMENT(S)  
Who is your customer?  
• Jewelry Store Admins  
• Store Managers  
• Goldsmiths / Workers  
• Billing Staff  
• Inventory Managers

—

2. 🔧 JOBS-TO-BE-DONE / PROBLEMS  
Which problems does your system address?

• Manual entry of customer, item, billing, and pricing records  
• No auto-calculation of pricing based on item type, weight, and purity  
• Role confusion due to lack of access control  
• No triggers or flows to validate or automate data entry  
• Difficulty in generating consolidated reports

—

3. 🎯 TRIGGERS  
What motivates them to act?  
• Frequent pricing or billing errors  
• High customer dissatisfaction  
• Delays in item delivery and order tracking  
• Need for reliable, role-based access and reporting tools

—

4. 💬 EMOTIONS: BEFORE / AFTER  
**Before:**  
• Frustrated with manual calculations  
• Confused about order status and records  
• Lacking confidence in system accuracy  
**After:**  
• Relieved with automatic calculations  
• Confident in billing and pricing  
• Informed through dashboards and validation alerts

—

5. 🛠 AVAILABLE SOLUTIONS  
What exists today?  
• Manual registers or Excel files  
• Basic inventory tracking software without automation  
• No built-in pricing logic enforcement or validation

—

6. 🚫 CUSTOMER CONSTRAINTS  
What stops them from acting?  
• Lack of digital familiarity  
• Limited budget for software  
• Resistance to change from paper-based systems  
• Concerns about security or data loss

—

7. 📋 BEHAVIOUR  
What do users do today to solve these problems?  
• Use calculators or price charts for billing  
• Manually assign tasks to workers verbally  
• Track customer orders in Excel  
• Use phone or WhatsApp for coordination

—

8. 📡 CHANNELS OF BEHAVIOUR

**8.1 ONLINE**:  
• Salesforce Lightning App  
• Automated pricing logic with flows  
• Apex trigger for paid amount validation  
• Reports for sales, inventory, and billing  
**8.2 OFFLINE**:  
• Manual price calculation  
• Verbal assignment of orders  
• Paper-based bill entry and customer logs

—

9. 🔍 PROBLEM ROOT CAUSE  
Why does the problem exist?  
• Lack of integrated CRM and pricing engine  
• No role-specific permissions or validations  
• Manual dependency on billing and gold rate logic  
• Inefficient communication between goldsmiths and admins

—

10. ✅ YOUR SOLUTION  
What do you offer?  
A Salesforce-based Jewel Inventory CRM with:  
• Custom Objects: Jewel\_Customer\_\_c, Item\_\_c, Price\_\_c, Customer\_Order\_\_c, Billing\_\_c  
• Apex Trigger: Validates and updates Paid Amount based on user input  
• Flows: Automate pricing based on purity, weight, and ornament  
• Reports: Sales by Item Type, Worker assignments, Revenue summary  
• Role-based profiles: Gold Smith, Worker, Admin  
• Record Types and Page Layouts for Gold and Silver items  
• Permission Sets for flexible access across users