

PROJECT DESIGN PHASE - II: SOLUTION REQUIREMENTS

Project Details :

Date	1 November 2025
Team ID	D8F92D7057F3ECFB2F642B79BD533CAA
Project Title	CRM Application for Jewel Management – (Developer)
Maximum Marks	4 Marks

Functional Requirements :

Following are the functional requirements of the proposed solution:

FR No	Functional Requirement (Epic)	Sub Requirement (Story / Sub-Task)
FR-1	Salesforce Setup	Create and activate a Salesforce Developer Account to build the CRM application.
FR-2	Object Creation	Create custom objects such as Jewel Customer, Item, Price, and Order to store business data.
FR-3	Tabs & Lightning App	Create custom tabs for each object and integrate them into a Lightning App for easy navigation.
FR-4	Fields & Relationships	Define standard and custom fields (Text, Phone, Email, Number, Currency, Picklist, Formula) and establish lookup and master-detail relationships.
FR-5	Profiles & Roles	Create user profiles (Goldsmith, Worker) and define role hierarchies for access control.
FR-6	User & Permission Management	Add new users, assign roles, and create permission sets to manage feature-level access.
FR-7	Page Layouts & Record Types	Design separate page layouts (Gold, Silver) and record types for better UI and data segmentation.
FR-8	Automation using Triggers & Flows	Implement Apex triggers and Flow automation to handle record creation, updates, and validations dynamically.
FR-9	Data Entry & Record Management	Create and manage Jewel Customer, Price, Item, Customer Order, and Billing records efficiently.

FR-10	Reports & Dashboard	Generate analytical reports and dashboards to visualize sales performance, stock, and customer insights.
FR-11	Validation Rules & Schema Builder	Add validation rules to maintain data accuracy and use Schema Builder to visualize object relationships.
FR-12	User Adoption Monitoring	Track user activity and record creation for performance and engagement analysis.

Non-Functional Requirements :

Following are the non-functional requirements of the proposed solution:

NFR No	Non-Functional Requirement	Description
NFR-1	Usability	The CRM interface should be intuitive and easy for users (Goldsmiths, Workers) to navigate without technical expertise.
NFR-2	Security	Role-based access and Salesforce authentication must ensure that data is accessed only by authorized users.
NFR-3	Reliability	System must ensure consistent performance and reliable data storage within the Salesforce cloud.
NFR-4	Performance	The system should execute queries, triggers, and automation flows quickly without lag.
NFR-5	Scalability	The CRM should handle an increasing number of customer, item, and transaction records as the business expands.
NFR-6	Availability	The Salesforce CRM should be accessible 24/7 via web or mobile for all authorized users.
NFR-7	Data Privacy	All customer, price, and billing data must remain confidential and comply with Salesforce data protection standards.