

PROJECT DESIGN PHASE - II: SOLUTION REQUIREMENTS

Project Details :

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| 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. |

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|-------|-----------------------------------|--|
| 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. |