REQUIREMENTS

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Team Id	NM2025TMID01192
Project Name	CRM Application for Jewel Management

Understanding Business Requirements

The jewelry retail business involves multiple operations — from maintaining customer profiles and jewelry stock to processing sales, custom orders, and repair services. Traditionally, many of these processes rely on manual record-keeping or disconnected systems, resulting in inefficiencies, data errors, and poor visibility into overall performance.

The CRM Application for Jewel Management addresses these issues by providing a centralized digital platform on Salesforce that integrates customer management, jewelry inventory, sales transactions, and payment tracking into a single, automated ecosystem.

Identified Problems & User Needs:

- Manual tracking of jewelry stock and sales increases the chance of data mismatches.

- Customer details and purchase history are often unstructured or duplicated.

- Store owners lack real-time visibility into total sales, payments, and stock movement.

- No systematic alert mechanism for order status or stock shortages.

- Limited control over who can view or modify sensitive records.

Proposed Solution:

The CRM provides a secure, automated, and centralized system where administrators, goldsmiths, and workers can manage their respective tasks seamlessly. Automation reduces manual effort, ensures real-time synchronization, and enhances

transparency across all departments.

Defining Project Scope and Objectives

This phase defines what functionalities are implemented in the initial CRM release and how they align with the business goals. The scope focuses on building a Minimum Viable Product (MVP) with essential modules such as:

- Customer Management

- Jewelry Inventory

- Orders and Payments

- Role-Based Access

- Automation and Reporting

Functional Requirements

Functional Modules:

- **Customer Management**: Create, view, and update customer records with complete transaction history.

- **Jewelry Inventory**: Add and manage jewelry items categorized by type, metal, and stock availability.

- **Order Management**: Generate and track customer orders, including custom-made jewelry.

- **Payment Tracking**: Manage different payment modes and maintain a log of transactions.

- **Reports & Dashboards**: Generate visual representations of total sales, most sold jewelry items, and revenue trends.

Non-Functional Requirements:

- **Usability:** Easy navigation using Lightning App and clear interface design.

- **Scalability:** Supports future expansion, such as multiple branches or online order integration.

- **Performance:** Real-time data updates with minimal latency.

- **Reliability:** Backup mechanisms and audit trails for all critical operations.

- **Security:** Enforced through Salesforce's role-based permissions and encryption mechanisms.

Expected Outcomes of Requirement Phase

- At the end of the Requirement Analysis phase, the following outcomes are achieved:

- A clearly defined functional blueprint for the CRM system.

- A comprehensive data and security model aligned with business needs.

- Documentation of user roles and permissions.

- A confirmed list of automation flows and reports to be built in the next phase.