

## OBJECTIVE

Date	05 November 2025
Team Id	NM2025TMID01192
Project Name	CRM Application for Jewel Management

The objective of the **CRM Application for Jewel Management** is to create a Salesforce-based platform that streamlines jewelry business operations. It centralizes customer, inventory, order, and payment management while reducing manual work through automation. The system ensures secure, role-based access for different users such as administrators, goldsmiths, and workers, improving efficiency, accuracy, and overall business performance.

### Business Goals

- **Centralized Business Management:** Provide a unified Salesforce-based platform for managing customers, jewelry items, sales orders, and payments efficiently.
- **Improve Operational Efficiency:** Automate repetitive tasks such as stock updates, billing, and customer notifications to save time and reduce manual errors.
- **Strengthen Data Security:** Implement Salesforce roles, profiles, and permission sets to control access and protect sensitive jewelry and customer data.
- **Enhance Customer Experience:** Maintain detailed customer records and transaction history to build trust and deliver personalized service.
- **Enable Real-Time Tracking:** Allow users to track jewelry stock, orders, and payment status instantly with live data updates and dashboards.
- **Support Data-Driven Decisions:** Generate insightful reports on jewelry sales, stock movement, and customer behavior to guide strategic business planning.

## Specific Outcomes

- **Simplified User Management:** Each user (Admin, Gold Smith, or Worker) can access only the features relevant to their role, reducing confusion and maintaining security.
- **Automated Processes:**  
Flows and triggers automate tasks like sending payment confirmations, updating stock after sales, and generating alerts for low inventory.
- **Streamlined Inventory Tracking:**  
Jewelry items are digitally recorded with details such as type, purity, and price — eliminating manual tracking errors.
- **Improved Customer Relationship Handling:**  
Customer data is centralized, allowing staff to quickly view purchase history, preferences, and pending payments.
- **User-Friendly Interface:**  
Salesforce Lightning App provides a clean, easy-to-navigate dashboard for managing all jewelry operations in one place.
- **Real-Time Updates and Reports:**  
All entries and updates are reflected instantly, and analytical dashboards help visualize sales performance and business growth.
- **Scalability and Customization:**  
The system is flexible enough to accommodate multiple jewelry branches, additional objects, or new Salesforce features in the future.