PROJECT PLANNING

Date	23 October 2025
Team ID	NM2025TMID01094
Project Name	CRM Application for Jewel Management - (Developer)
Maximum Marks	5 Marks

Project planning :

This plan outlines the agile development for the CRM Jewel Management System on the Salesforce low-code platform. It focuses on automating high-value sales, service, and inventory operations for a jewelry business.

1. Project Scope and Objectives :

- **Scope:** Develop an end-to-end system managing Customer Profiles, Precious Item Inventory linking, Service/Repair Booking and Tracking, and Financial Billing.

- **Objective:** The primary goal is to automate manual processes to ensure data accuracy and achieve high transactional integrity.

- **Success Metric:** The system must achieve a 98% Execution Success Rate and a 95% Confidence Score in automated logic for all critical transactions.

2. Development Phases :

The project uses an iterative, agile approach to deliver a Minimum Viable Product (MVP) quickly:

- **Phase 1: Planning & Setup:** Define the solution architecture, set up the Salesforce development environment, and finalize all testing benchmarks.

- **Phase 2: Core Module Development (MVP):** Develop and unit-test all High-Priority Modules (Customer, Service, Billing), focusing on foundational automation rules.

- **Phase 3: Integration & Testing:** Conduct Performance Testing (Load/Stress) and User Acceptance Testing (UAT). Integrate Medium Priority enhancements after validation.

- **Phase 4: Deployment & Closure:** Deploy the fully tested system to production, conduct end-user training, and complete project documentation.

3. Feature Prioritization :

Features are prioritized based on their essential business value to ensure critical operations are addressed first:

- **High Priority:**

  - **Customer & Billing:** Implementation of the New Customer Details creation model and the New Billing details and feedback model for transaction closure.

  - **Service Management:** Implementation of the Booking Appointment and New Service records models for tracking repairs/custom work performed by the Jeweler.

- **Medium Priority :**

  - **Inventory & Staff:** Detailed tracking of precious stone specifications (GIA, Carat, Cut) and automated task assignment to staff based on workload.

- **Lower Priority :**

  - **Reporting:** Building the Reporting and Analytics Module and implementing automated customer notifications (e.g., 'Repair Complete').