

## SOLUTION REQUIREMENTS

Date	23 October 2025
Team ID	NM2025TMID01094
Project Name	CRM Application for Jewel Management - (Developer)
Maximum Marks	4 Marks

### Functional Requirements :

The Functional Requirements detail the specific actions and capabilities the CRM system must perform, categorized by the core module they support.

Category	Requirement	Success Criterion/Image Reference
1. Customer Management	Customer Record Creation: System must allow Sales Associates to create a New Customer Details record, capturing all mandatory personal and contact information.	
	Data Validation: System must enforce validation rules (e.g., unique customer ID, valid email format) to ensure data accuracy.	95% Confidence Score in validation reliability
	Item Linking: System must allow Precious Item Inventory records to be linked directly to the corresponding Customer record upon sale.	Master-Detail/Lookup relationship required.

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2. Service Management	Appointment Booking: System must allow staff to create a New Appointment record, specifying the service type (Repair, Appraisal, Custom) and the associated item.	
	Automated Assignment: System must automatically assign a service appointment to an available Jeweler based on defined criteria (e.g., specialization, workload).	Process/Flow automation required.
	Service Record Tracking: System must allow the Jeweler to detail work performed in the New Service records object, including labor hours and parts used (e.g., weight of gold, specs of replacement stone).	Fields for material cost tracking required.
	Status Management: System must track the service status using a controlled picklist that triggers the billing process when set to 'Ready for Billing'.	Controlled picklist required.
3. Financial Transaction	Invoice Generation: System must allow Sales Associates to initiate the New Billing details and	

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	feedback process from a completed Sale or Service Record.	
	Automated Calculation: System must automatically calculate the final invoice total by summing labor costs and material costs from the Service records.	Automation logic (Flow) required.
	Payment Recording: System must allow staff to record the payment status (Paid, Pending) and payment type.	98% Execution Success Rate required for transactions.
4. Reporting & Analytics	Operational Dashboard: System must provide a dashboard displaying key operational metrics, such as the number of open service jobs and current inventory levels.	Salesforce Dashboard required.
	Performance Reporting: System must allow Managers to report on Jeweler productivity and sales trends.	Standard and custom reports required.