

## Project Planning Phase

### Project Planning Template (Product Backlog, Sprint Planning, Stories, Story points)

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| Date          | 27 JUNE 2025                                    |
| Team ID       | NM2025TMID03680                                 |
| Project Name  | CRM Application for Jewel Management(Developer) |
| Maximum Marks | 5 Marks   |

#### **Product Backlog, Sprint Schedule, and Estimation:**

The **CRM Application for Jewel Management(Developer)** project followed the **Agile Scrum methodology** to ensure flexibility, collaboration, and efficient delivery of features. The development was divided into multiple sprints, each focusing on specific modules and functionalities within the CRM system. Tasks were assigned based on expertise and workload balance among the team members — **Kishore M, Dheenadayalan S, Jayasimma D and Kavin P.**

#### **● Sprint 1 – User Management & Inventory Setup (3 November 2025):**

- This sprint focused on building the **User Management** and **Jewellery Inventory** modules, forming the backbone of the CRM system.
- **Dheenadayalan S** led the development of user authentication and access control, ensuring secure login and data validation.
- **Jayasimma D** worked on designing the **product catalog structure**, adding fields for jewellery type, weight, price, and metal purity.
- The sprint also included validation checks for data entry and smooth user navigation within the Salesforce environment.
- Testing confirmed accurate user creation and proper inventory linkage, ensuring that foundational modules performed as expected.
- *Priority: High | Duration: 1 Day | Date: 3 November 2025*

#### **● Sprint 2 – Customer & Sales Management (3 November 2025):**

- In the second sprint, the focus was on **Customer Information Management** and **Sales Transactions**.
- **Kishore M** implemented the customer records module, allowing the system to store and manage client profiles efficiently.
- **Kavin P** developed the **Sales and Billing module**, automating the process of order creation, payment entry, and invoice generation.
- Data relationships were created between customers, orders, and products to ensure real-time updates across the CRM.
- Manual testing validated that all records were linked properly, and sales data flowed seamlessly through the system.
- *Priority: High | Duration: 1 Day | Date: 3 November 2025*

#### **● Sprint 3 – Reports, Dashboards & Analytics (4 November 2025):**

- The third sprint emphasized data-driven decision-making through **Dashboards and Reports**.
- **Dheenadayalan S** and **Jayasimma D** collaborated on creating visual dashboards that displayed stock levels, daily sales, and top-selling products.
- **Kishore M** implemented the **report filters and grouping logic** for performance tracking and data visualization.
- Custom dashboards helped visualize sales performance and stock movement, enabling easy business insights for store owners.

- Testing verified that all reports dynamically updated with real-time Salesforce data.
- *Priority: Medium | Duration: 1 Day | Date: 4 November 2025*

 **Sprint 4 – Automation, Email Alerts & Deployment (4 November 2025):**

- The final sprint focused on implementing **automation, alerts, and deployment procedures**.
- **Kavin P** set up **Flows** and **Email Alerts** to notify users of key activities like low stock, order confirmation, and customer updates.
- **Dheenadayalan S** handled system deployment, configuring the CRM for smooth operation in a production-like environment.
- The team prepared detailed **documentation** covering data models, relationships, and user flow.
- Final validation confirmed the system was production-ready with a high degree of reliability, efficiency, and user satisfaction.
- *Priority: Medium | Duration: 1 Day | Date: 4 November 2025*

The sprint structure allowed efficient collaboration, parallel task handling, and high productivity. Each module was tested, validated, and integrated seamlessly, ensuring the **CRM Application for Jewel Management(Developer)** met business needs with accuracy and efficiency.

The project's progress was tracked using **Velocity Charts** and **Burndown Charts** to monitor completion rates and workload distribution. Each sprint carried an average of **20 story points** and lasted one day for rapid iteration and delivery.

- **Sprint 1 (3 November 2025):** Completed all planned 20 story points on time, establishing user and inventory modules.
- **Sprint 2 (3 November 2025):** Delivered 20 story points covering customer and sales management, verified successfully.
- **Sprint 3 (4 November 2025):** Completed 19 out of 20 points, with dashboard refinement scheduled for the final sprint.
- **Sprint 4 (4 November 2025):** Achieved 20 story points, implementing automation, alerts, and deployment.

The **velocity remained consistent**, reflecting the team's strong coordination and productivity. The **Burndown Chart** indicated smooth progress with minimal backlog, demonstrating effective sprint planning and timely delivery.

By maintaining continuous collaboration, quick feedback loops, and efficient sprint execution, the team successfully delivered a **fully functional CRM system** that streamlined jewellery business operations, enhanced data integrity, and improved overall management efficiency.

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