4.PROJECT PLANNING

1. Objective

The Project Planning Phase establishes the foundation for the design and development of the CRM-based Jewel Management System.
Its main goal is to analyze requirements, define entity relationships, plan security controls, and structure user roles to ensure smooth business operations for jewelry management within Salesforce.

This phase also identifies the logical data flow, user hierarchy, and automation scope needed to support customer tracking, sales operations, and inventory management effectively.

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2. Overview of the Planning Process

The planning phase for the CRM Jewel Management System includes the following key components:

- Defining Core Entities and Relationships
- Designing Security and Data Sharing Models
- Creating Users and Assigning Roles
- Establishing Timeline, Tools, and Resources

This ensures that the CRM system aligns with jewelry business objectives — enhancing sales efficiency, customer engagement, and inventory accuracy

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3. Core Entity Identification

The JewelCRM application is structured around five main custom objects, each representing a key part of jewelry business operations.

ObjectName	Description	Relationships
Customer	Stores personal and contact information of jewelry customers.	Linked to Sales Order and Invoice.
Jewelry Item	Represents each jewelry product with details like type, weight, and price	Linked to Inventory and Sales Order.

ObjectName	Description	Relationships
Sales Order	Records purchase details between customer and store.	Master-Detail with Invoice.
Invoice.	Generates bills and payment details for each sale.	Child of Sales Order.
Inventory	Maintains stock levels of jewelry items.	Linked to Jewelry Item and Sales Order.

his structure helps track jewelry sales, billing, and stock movements effectively from customer order to inventory update.

4. Relationship Strategy

The relatioships among these entities ensure data integrity and process automation:

Relationship Type	Object Pair	Purpose
Master-Detail	Sales Order → Invoice	Automatically delete related invoices when sales orders are deleted.
Lookup	Jewelry Item → Inventory	Enables stock tracking and updates.
Formula	Sales Order → Customer .	Calculates total value of sales per customer

This structure supports business logic, report generation, and automatic data updates via Flows and Triggers.

5. Security and Profile Planning

Salesforce's Security Model ensures data privacy and role-based access control for different jewelry store users.

5.1 Custom Profiles Created

Profile Name	Description	Access Level
Sales Staff Profile .	Used by store salespersons to record and manage customer sales..	Read, Create, and Edit permissions on Sales Order and Customer
Manager Profile	Used by store managers to monitor overall performance.	Full CRUD access on all sales and inventory objects.

Each profile was cloned and customized from standard Salesforce profiles, ensuring users only access required data.

5.2 Public Groups

To streamline record visibility and sharing:

Public Group	Members	Purpose
Sales Executives	Sales staff users	Handles customer billing and sales entry..
Store Managers	. Admin and manager users	Oversee stock, performance, and reports

6. Data Access and Sharing Rules

Criteria-Based Sharing Rules were configured to maintain control over jewelry business data.

- If Branch = Chennai, share records with Sales Executives group.
- If Role = Manager, share all records under that branch.

Purpose:

- Sales Staff access only customer and sales data from their assigned branch.
- Managers view organization-wide sales and stock reports.

- This configuration ensures efficiency, data relevance, and privacy.

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7. User Creation and Role Assignment

User creation followed a structured procedure in Salesforce Setup

7.1 Procedure

- Navigate to Setup → Users → New User.
- Enter details (Name, Email, Username).
- Assign Salesforce Platform License to Sales Staff.
- Assign Salesforce License to Managers.
- Map users to Profiles and Public Groups accordingly.

7.2 User Hierarchy

Role	Assigned Profile	Group	Privileges
Store Manager	Manager Profile	Store Managers	Full Access
Sales Executive	Sales Staff Profile	Sales Executives	Limited Access
System Admin	Standard Admin	N/A	Full Setup Access

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8. Environment Setup and Configuration

This part ensures a consistent working environment for testing and future scalability.

Steps:

1. Developer Edition account created from developer.salesforce.com/signup.
2. Verified access and enabled Salesforce Lightning Experience.
3. Set organization branding (App Name: *JewelCRM*).
4. Installed essential tools like **Flow Builder**, **App Manager**, and **Schema Builder**.
5. Created **Custom Tabs** for easy navigation to all entities.

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9. Project Timeline and Resource Plan

Phase	Duration	Key Deliverables
Ideation	2 Days	Problem Definition, Brainstorming
Planning	3 Days	ERD, Security Model, User Creation
Requirement Analysis	4 Days	Validation rule and Field Configuration
Design & Implementation	5 Days	App, AutomationFlow, Dashboard
Testing & Deployment	2 Days	Validation, Reporting

10. Tools and Resources Used

Tool	Purpose
Salesforce Lightning App Builder	UI and App Design
Flow Builder	Sales and Billing Automation
Apex Trigger	Stock Update and Alerts
Dashboard Builder	Sales and Revenue Visualization
Schema Builder	Entity Relationship Design
SmartInternz Platform	Mentorship and Project Submission

11. Expected Outcomes of the Planning Phase

- At the end of the Project Planning Phase:
- At the end of the planning phase:
- All data models and relationships were finalized.
- Security, profiles, and sharing rules configured.
- Developer environment fully prepared for design.

This ensures the CRM application is ready for the design and implementation phase.

12. Summary

- The Project Planning Phase for CRM Application for Jewel Management establishes a complete blueprint for development.
- By defining entities, roles, and access models, it ensures the system's scalability and security.
- Salesforce's powerful tools support efficient workflow automation, making the CRM system ideal for modern jewelry businesse