

PROJECT OVERVIEW

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Team Id	NM2025TMID04354
Project Name	CRM Application for Jewel Management

The **CRM Application for Jewel Management** is a cloud-based platform built using Salesforce to streamline jewelry business operations. It helps manage customers, jewelry inventory, orders, sales transactions, and user roles efficiently. The system centralizes data, automates sales tracking, and enables better communication between store managers, sales staff, and administrators.

This project simplifies day-to-day jewelry store activities by integrating customer relationship management and product handling into one unified system. Key processes such as order creation, customer interaction tracking, and payment management are automated, reducing manual effort and human error. It also allows jewelry store administrators to assign roles such as Gold Smith, Worker, and Manager with appropriate access levels to ensure data security and task delegation.

The CRM system's ultimate goal is to enhance productivity, maintain data accuracy, and provide insightful dashboards and reports for better business decisions.

Technical Approach

The Jewel Management CRM uses Salesforce's powerful tools and declarative features to design a dynamic, secure, and user-friendly application. The system's technical architecture focuses on **custom objects**, **profiles**, **roles**, and **permission sets** to manage jewelry-related data and user access.

- **Salesforce Platform Setup:** A Developer Org was created to configure and test

the CRM modules before deployment.

- **Custom Objects & Fields:** Separate objects were created for *Customer*, *Jewelry Item*, *Orders*, and *Payments* to store detailed information.
- **Role-Based Access:** Each user (e.g., *Gold Smith*, *Worker*, *Manager*) has specific permissions defined using Salesforce profiles and permission sets.
- **Automation Tools:** Salesforce Flows and Triggers are implemented to automate processes such as order confirmation, payment updates, and stock management.
- **Lightning App Design:** A dedicated *Jewel Management App* provides easy navigation through tabs like *Customer*, *Jewelry*, *Orders*, and *Payments*.
- **Data Security:** The system uses Salesforce's authentication and role hierarchy features to ensure that sensitive business data is protected.

This approach ensures scalability, real-time data synchronization, and efficient handling of jewelry-related operations through a modern CRM interface.

Benefits

The CRM Application for Jewel Management provides significant advantages to both administrators and users:

- **Centralized Data Management:** All jewelry, customer, and transaction records are stored securely in one system.
- **Role-Based Access Control:** Only authorized users such as *Gold Smiths* or *Administrators* can modify or view specific data.
- **Automation and Time Saving:** Processes like order tracking, payment updates, and report generation are automated using Salesforce Flows.
- **Enhanced Accuracy:** Validation rules prevent incorrect data entry and duplication.
- **User-Friendly Interface:** Salesforce Lightning App offers an intuitive design for quick navigation.
- **Improved Sales Tracking:** Real-time dashboards and reports give managers insights into daily and monthly sales performance.

- **Scalability:** The system can easily be expanded to manage multiple branches or additional features.

Security and Compliance: Built-in Salesforce security ensures that customer and business data remain confidential.