NAAN MUDHALVAN PROJECT REPORT

SB8067- SALESFORCE DEVELOPER

“CRM APPLICATION FOR JEWEL MANAGEMENT “

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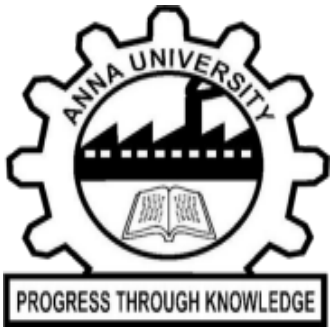

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2. Project Planning Phase — CRM application for jewel management

2.1 Introduction

The Salesforce-based CRM Application for Jewel Management aims to streamline and digitalize the core operations of jewelry businesses, including customer interactions, sales tracking, inventory management, order processing, and service handling. Traditional jewel management often relies on manual records and disconnected tools, leading to inefficiencies and poor visibility of customer behavior. This project leverages the powerful cloud capabilities of Salesforce to provide an integrated, scalable, and secure CRM solution specifically tailored for jewelry retail and wholesale operations. The system will enhance customer engagement, optimize internal workflows, and improve data-driven decision-making through centralized management of customer, product, and transaction information.

2.2 Project Scope

- The scope of this project includes the complete design and implementation of a custom CRM application on the Salesforce platform. It covers the creation of custom objects, workflows, automation rules, dashboards, and integrations relevant to jewel management.
- The system will support customer profiles, product catalogs, order lifecycle tracking, warranty and service management, and sales analytics. The scope also includes user training, testing, and deployment within the Salesforce environment. Non-Salesforce external system integrations and advanced AI-driven features are considered out of scope for this phase.

2.3 Objectives (repeated concisely)

- To develop a centralized CRM system for managing customer information, purchase history, and service requests.
- To automate jewelry sales processes including order generation, invoicing, warranty tracking, and customer follow-ups.
- To build dashboards and reports for real-time visibility of sales performance and customer trends.
- To improve operational efficiency by reducing manual work and minimizing data errors.
- To enhance customer satisfaction through personalized engagement and timely service reminders.

2.4 Deliverables

- Fully configured Salesforce CRM application tailored to jewelry management
- Custom objects (e.g., Jewels, Orders, Warranty, Customer Profile)
- Automation workflows (email alerts, approvals, follow-ups)
- Validation rules and security configurations
- Custom dashboards and reports
- Test cases and testing result documentation
- User training guide and demonstration video
- Final deployment package and project documentation

2.5 Team Roles

- Sanjay Kumar V: Project Lead&UI/UX Designer =coordinates stakeholders and documentation Creates test cases, performs functional and UAT testing, and ensures quality in delivery..
- Hemakumar. S : Business Analyst =Gathers requirements, processes documentation, and ensures solution alignment with business needs.
- Priyan. C : QA/Test Engineer =Creates test cases, performs functional and UAT testing, and ensures quality in delivery.
- Saran. S : Salesforce Administrator =Configures user roles, permissions, data management, and platform setup.
- Abishek. N : Salesforce Developer =Builds custom objects, workflows, Apex triggers, Lightning pages, and integration.

2.6 Timeline (10 weeks)

- Week 1: Requirement gathering, stakeholder meetings, and process analysis.
- Week 2: Project plan finalization, system architecture and data model design.
- Week 3: Creation of custom objects, fields, and relationships.
- Week 4: Development of custom workflows, email alerts, and approval processes.
- Week 5: Implementation of triggers, flows, and business logic.
- Week 6: UI/UX configuration (Lightning pages, layouts, navigation).
- Week 7: Report and dashboard creation.
- Week 8: Testing phase (functional, integration, and UAT).
- Week 9: Fixes, optimization, and deployment preparation.
- Week 10: Final deployment, training, and documentation handover.

2.7 Resources

- Salesforce Developer/Enterprise Edition org
- Laptops or workstations with stable internet
- Requirement documents and process flowcharts
- Salesforce Trailhead modules for team training
- Tools for documentation (Google Docs, MS Office, Lucidchart)
- QA testing tools (Salesforce Inspector, Postman if APIs used)

2.8 Risk Management

- **Requirement Changes**
  Mitigation: Freezerequirements early; follow change request protocols.
- **Data Security Risks**
  Mitigation: Implement Salesforce security best practices like profiles, roles, and permission sets.
- **Integration Failures**
  Mitigation: Perform early API testing and sandbox validations.
- **Timeline Delays**
  Mitigation: Weekly progress reviews and resource reallocation when needed.
- **User Adoption Issues**
  Mitigation: Provide training sessions, user-friendly UI, and support documentation.
- **Technical Limitations of Salesforce**
  Mitigation: Use alternatives like Apex automation where standard features fall short.