Salesforce Project Documentation – Jewel Management CRM

Project Overview

The Jewel Management CRM is designed to streamline and automate jewelry business operations. It helps in managing customer data, bookings, payments, inventory, and sales processes effectively. This system improves customer relationship management by providing a centralized platform for all jewelry-related business activities. Key features include automated workflows, approval processes, user security, and detailed reporting dashboards.

Objectives

The main objective of this CRM is to enhance the efficiency of jewelry business operations by digitizing manual processes. It aims to:

Provide better customer management (customer details, bookings, and purchase history).

Automate business workflows such as approvals, payments, and order tracking.

Improve reporting and analytics for business insights.

Ensure secure access and role-based permissions for different users.

Deliver future scalability by allowing integration with AI features like chatbot-based customer support.

1. Salesforce Setup & Configurations

Created Custom Objects: Customer, Booking, Payment, Jewelry Inventory.

Configured relationships between objects to maintain smooth data flow.

Set up page layouts, record types, and dynamic forms for better UI.

2. Validation Rules, Approval Processes & Automation Flows

Validation rules to ensure data accuracy (e.g., mandatory email for customers, valid payment amounts).

Approval process for booking confirmations.

Automation flows to update inventory when a booking/payment is confirmed.

3. Testing Approach

Verified flows with sample customer booking and payment entries.

Tested approval process by creating a sample request and verifying manager approval.

Reports were tested to ensure correct aggregation of data (e.g., total sales, customer bookings).

4. Future Enhancements

AI-powered chatbot for quick customer queries.

WhatsApp/email integration for booking reminders.

Advanced analytics dashboards for trend predictions (most purchased jewelry, seasonal sales).

Conclusion

The Jewel Management CRM project successfully automates and streamlines jewelry business operations. It ensures improved customer management, secured role-based access, and effective reporting for decision-making. With future enhancements like AI integration, the CRM will further improve customer engagement and business growth.