

Project Title: ArtifactVault – Digital Asset & Artifact Preservation CRM for Museums & Collectors

Project Summary: ArtifactVault is a CRM system built for museums, private collectors, and cultural institutions to track, manage, restore, and digitally preserve historical artifacts, rare items, and artwork. It includes asset condition reports, location tracking (across exhibitions), restoration workflows, ownership/provenance management, and integration with 3D scanners or digital catalogs via API.

Phase 1: Problem Understanding & Industry Analysis

1.1 Requirement Gathering

Stakeholders:

- Curators: Manage artifact catalog & metadata
- Conservators: Handle restoration & condition checks
- Exhibition Planners: Coordinate artifact transport & exhibits
- Digital Archivists: Upload scans & digital replicas
- Security Team: Control access & location logs

Main Objectives:

- Track artifact metadata, condition, ownership history
- Manage transport between exhibitions & storage
- Automate restoration scheduling and condition alerts
- Provide portal access for historians/researchers (Experience Cloud)
- Integrate with digital catalogs (3D scans, provenance databases)

1.2 Stakeholder Analysis

Roles	Responsibilities
Curator	Catalog and manage artifact records
Conservator	Log conditions,schedule restorations
Exhibition Manager	Plan and track artifact movements
Archivist	Upload digital files and scans
Admin	Configure system and security

1.3 Business Process Mapping

Process	Description
Artifact Acquisition	Enter new artifacts (Artifact__c)
Condition check	Regular updates via Condition_Report__c
Movement Request	Track transfers (Transfer_Log__c)
Scheduled Restoration	Assign restoration tasks
Digital Asset Upload	Link scans and digital replicas
Exhibit planning	Group artifacts for exhibits

1.4 Industry Use Case Analysis

Challenges:

- Poor digital tracking of location & condition
- Manual restoration planning
- Fragmented provenance records
- Difficult sharing of 3D scans/documents

CRM Use Case:

- Custom objects for artifacts, condition, transfers
- Automated notifications for restoration
- Role-based digital file access
- API integration with external catalogs

1.5 AppExchange Exploration

App/Tool	Use Case
Conga	Generate condition reports
DocuSign	Artifact acquisition agreements
Box/Dropbox	Store images & 3D scans
Google Maps API	Visualize artifact locations

Phase 2: Org Setup & Configuration

2.1 Salesforce Edition & Environment Setup

- Edition: Enterprise
- Sandboxes: Dev Sandbox, Partial Sandbox (UAT)

- Dev Tools: VS Code, SFDX, GitHub repo

2.2 Company Profile

- Org Name: ArtifactVault Preservation CRM
- Time zone: GMT
- Multi-currency: Enabled (for international acquisitions)
- Fiscal Year: Custom aligned with museum grant cycles

2.3 Business Hours & Holidays

- Standard museum hours: 9 AM – 5 PM
- Regional holidays configured for automated task handling

2.4 User Setup & Roles

Profile	Role & Access
Curator	Full access to artifact records
Conservator	Access to condition & restoration
Exhibition Planner	Manage movement logs & exhibits
Archivist	Upload digital files only
System Admin	Full system control

Permission Sets:

- View Digital Assets
- Edit Transfer Logs
- Upload Scanned Records

2.5 Security Settings

- OWD: Private for artifact records, controlled by role hierarchy
- Sharing Rules: Read-only access for digital archivists
- Login Policies: Location-based restrictions, session timeouts for portals

2.6 Development Org Setup & Deployment Basics

- Initialize SFDX project and connect to GitHub
- Use Dev Sandbox for development, Partial Sandbox for UAT
- Deploy via Change Sets and SFDX CLI commands