

## Ideation Phase

### Define the Problem Statements

Date	01 November 2025
Team ID	NM2025TMID01112
Project Name	CRM Application for Jewel Management System
Maximum Marks	2 Marks

### Customer Problem Statement Template

Jewelry business owners and managers face challenges in managing inventory, billing, and customer details using traditional manual methods.

Due to the absence of a centralized system, they often experience **data loss, billing errors, and inefficiency** in maintaining sales and stock records.

This leads to poor customer service, delayed reporting, and lack of business insights.

They need a **cloud-based CRM system** that can record jewelry item details, maintain customer information, and automate billing and reporting.

Such a solution will help businesses streamline operations, reduce human errors, and gain better control over sales and inventory data.

# Problem & Solution Table

CRM Application for Jewel Management Systems

Problem	Description	Solution
Manual keeping	Jewelry businesses use books, spreadsheets to track customer and stock, leading to data duplication and errors.	Implement a <b>Salesforce CRM system</b> with custom objects and calculations to maintain accuracy.
Inefficient billing process	Admins may accidentally remove, lookup relationships, and encounter errors.	Automatically archive receipts and add delta costs to ledgers.
Inefficient billing process	Billing is handled manually, making it slow and prone.	Automate billing using formula fields triggers that calculate cost instantly.
Lack a centralized data	Sales, customers, and inventory data are scattered.	Create custom objects and centralized Lightning App for all business owners.
Poor business insights	No visual reports or analytics delay decision-making.	Develop dynamic reports and dashboards displaying sales, top-selling items, and customer trends accessible.

<b>Problem Statement (PS)</b>	<b>I am (Customer)</b>	<b>I'm trying to</b>	<b>But</b>	<b>Because</b>	<b>Which makes me feel</b>
PS-1	a Jeweler/Owner	track customer preferences and purchase history	the manual records are incomplete	there's no centralized system to log all	frustrated and inefficient when trying to offer
PS-2	a Sales Associate	generate a bill for a customer quickly	the billing process is manual and time-consuming	I have to manually calculate totals and taxes, leading to delays	stressed and rushed during busy periods
PS-3	a Business Manager	understand which jewelry items are selling best	there are no easy-to-read reports or dashboards	I have to manually go through sales data to find trends	uninformed and unable to make data-driven decisions
PS-4	an Administrator	add new inventory items efficiently	data entry is redundant and error-prone	I have to enter information into multiple spreadsheets,	annoyed and worried about data accuracy

				causing inconsistencies	
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### **Problem Statement-Ps 1**

**As a Jewelry Store Owner**, I want to maintain accurate records of all jewelry items and customers, but the current manual process often causes duplication and missing data. This makes it difficult to track which items are available or sold, leading to confusion and loss of sales opportunities.

### **Problem Statement-Ps 2**

**As a Sales Worker or Manager**, I want to generate accurate bills and reports for customers, but manual calculations take time and often contain errors. This slows down the sales process and reduces customer satisfaction.