

Ideation Phase
Brainstorm & Idea Prioritization
Template

Date	01 November 2025
Team ID	NM2025TMID01112
Project Name	CRM Application for Jewel Management System
Maximum Marks	4 Marks

Project Overview

The proposed solution, *Prevent User Deletion if Assigned to an Incident*, is designed to maintain data integrity within the system by ensuring that users linked to active incidents cannot be deleted. The process involves creating test user accounts, associating incidents to them, and implementing a **business rule** to restrict deletion when dependencies exist. This approach safeguards against the accidental removal of critical data and preserves ongoing workflow continuity. A verification test ensures that unassigned users can still be deleted safely, thereby validating both functional and logical accuracy of the implemented rule. This implementation enhances the **security and reliability** of system operations, ensuring that administrative actions align with organizational data management standards.

Step 1: Team Gathering, Collaboration, and Problem Statement Selection



Step 2: Brainstorming, Idea Listing, and Grouping

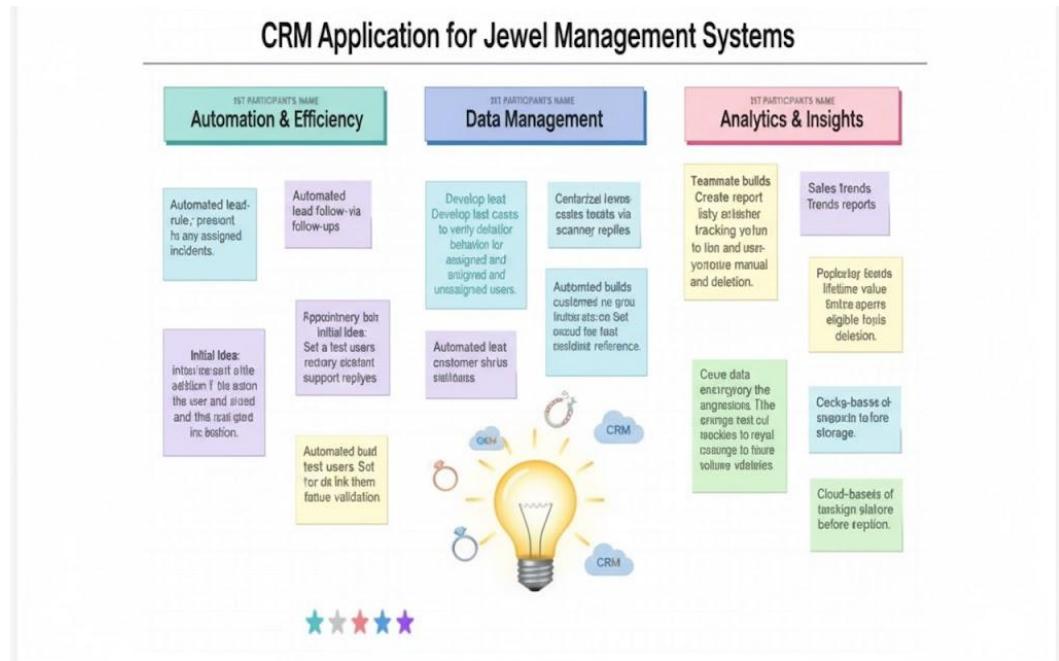


Figure 2: Illustration of Team Brainstorming Process

Brainstorming:

Team members contributed freely to explore multiple ways to prevent user deletion errors. Open discussions encouraged creativity and inclusion of both technical and administrative solutions.

Idea Listing:

All suggestions—ranging from validation rules and triggers to automation flows—were recorded for collective analysis and future consideration.

Grouping:

Similar ideas were categorized into clusters such as *Data Validation*, *User Access Control*, and *Automation Logic*. This helped identify overlapping concepts and refine priorities.

Action Planning:

The final plan focused on implementing a business rule and Apex logic to restrict deletions. Responsibilities and timelines were defined for each team member to ensure systematic progress.

Step 3: Idea Prioritization

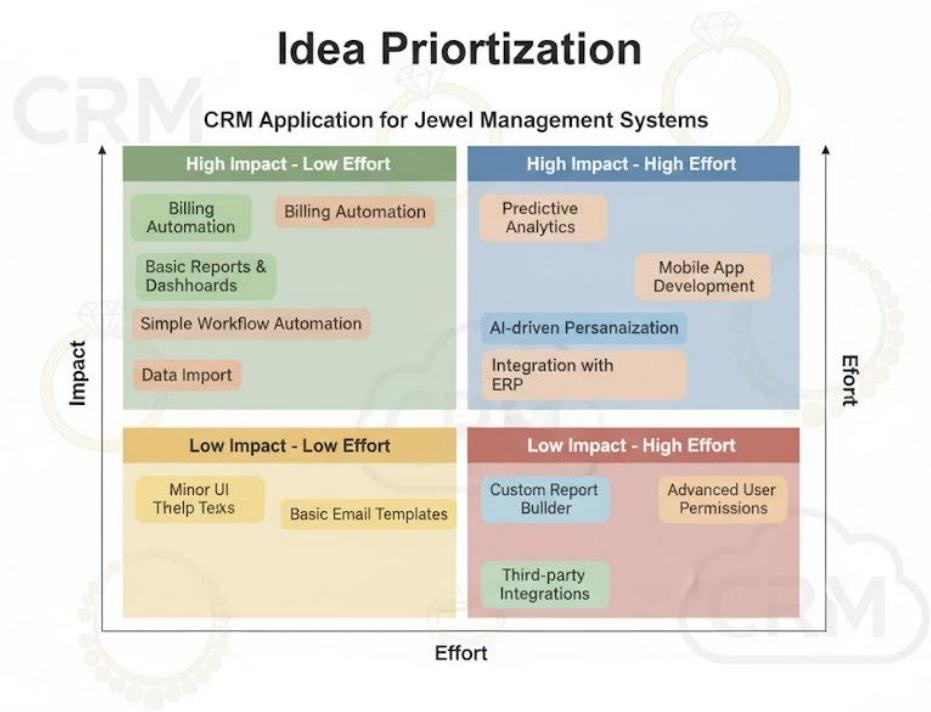


Figure 3: Workflow Diagram – Steps to Prevent User Deletion

Idea prioritization helped the team convert a broad concept into structured, actionable steps. The highest priority was assigned to implementing a **trigger or validation rule** that blocks deletion if the user is associated with an incident record.

This approach ensures **data integrity**, **accountability**, and **security** within the CRM system. By isolating this process from routine administrative tasks, the system maintains controlled user management while preventing accidental data loss. Visual aids such as workflow diagrams and sequence charts were used to simplify understanding and streamline execution.

Conclusion

The ideation phase successfully defined a clear, implementable solution that enhances operational reliability within Salesforce CRM. Through collaborative brainstorming, structured prioritization, and systematic planning, the project ensures that critical data relationships remain protected. The outcome reinforces best practices in CRM data management and establishes a foundation for secure automation in future system enhancements.