

Ideation Phase

Brainstorm & Idea Prioritization

Template

Date	27 OCT 2025
Team ID	NM2025TMID01965
Project Name	CRM Application for Jewel Management
Maximum Marks	4 Marks

CRM Application for Jewel Management Template:

This guided project demonstrates how to develop a CRM-based Jewel Inventory System using Salesforce. The Jewel Inventory System is a comprehensive software solution designed to streamline and manage the inventory and sales processes of a jewellery store or manufacturer. The system ensures efficient and user-friendly operations to track jewellery items, control stock levels, maintain accurate records, and enable seamless sales transactions.

The CRM component helps store owners maintain strong customer relationships through automated communication, targeted marketing, and data-driven insights. The solution focuses on delivering a unified platform for inventory management, customer management, and sales automation using Salesforce tools.

Step 1: Team Gathering, Collaboration, and Problem Selection

Team members collaborate to identify the challenges faced in jewellery business management, such as inventory tracking, order management, and customer follow-ups.

The selected problem statement:

“To design a Salesforce CRM Application that manages jewellery inventory, customer data, and sales transactions efficiently.”

Step-1: Team Gathering, Collaboration and Select the Problem Statement:



Step 2: Brainstorm, Idea Listing, and Grouping

The team discussed ideas related to inventory control, customer tracking, sales dashboards, and automated notifications in Salesforce.

Idea Listing:

- Real-time Salesforce project with live data.
- Custom object creation for jewellery items.
- Relationship mapping between products and customers.
- Application UI customization.
- Automation with flows and validation rules.
- Generating reports and dashboards for sales tracking.

Grouping:

Ideas are grouped under these key modules:

1. Inventory Management – Objects for jewellery items, stock, and suppliers.
2. Customer Relationship – Contacts, leads, and purchase history.
3. Sales & Reporting – Dashboards, analytics, and performance tracking.
4. Automation – Flows, alerts, and rule-based actions.

Action Planning:

Each module is assigned to team members for development and testing. Timelines are set for object creation, UI setup, and dashboard configuration.

CRM Application for Jewel Management			
Bhavadarani B (Team Member 1)	Dhanushiya S (Team Member 2)	Hemala N (Team Member 3)	Yasika N (Yasika Member 4)
Automated Lead Tracking Use Salesforce flows to automatically capture and assign customer leads from website inquiries to the sales team based on region or product interest	Custom Dashboard for Sales Performance Design a Salesforce dashboard to display key sales metrics—daily revenue, top-selling items, and salesperson performance	Dynamic Pricing Formula Field Add a formula field that automatically adjusts jewelry prices based on weight, material type, and market value	Repair Request Management Flow Build a guided flow for managing jewelry repair requests—from receiving, tracking progress, to notifying completion
Inventory Alert System Implement trigger-based alerts when jewelry stock levels drop below a set threshold to maintain continuous availability	Email Template for Customer Follow-ups Create automated personalized email templates for follow-up messages after purchase or inquiry	Customer Loyalty Points Tracker Develop a record type and object relationship for tracking and redeeming loyalty points for repeat customers	Advanced Report & Dashboard Setup Create detailed analytical reports on inventory turnover, product performance, and sales by category for man-

Step 3: Idea Prioritization



Idea prioritization focuses on building the CRM in modular steps to ensure smooth execution and scalability.

Priority features:

1. **Data Modelling** – Creating objects and relationships in Salesforce.
2. **User Interface Customization** – Designing forms and layouts for easy data entry.
3. **Automation & Validation** – Using formula fields, validation rules, and flows.
4. **Email Alerts & Templates** – For customer engagement and notifications.
5. **Reports & Dashboards** – To analyze sales, stock movement, and customer trends.