

PROJECT PLANNING PHASE

Date	01 NOVEMBER 2025
Team ID	4CF9B0641590872B2C04C54C5A691F2E
Project Name	CRM Application for Jewel Management
Maximum Marks	5 MARKS

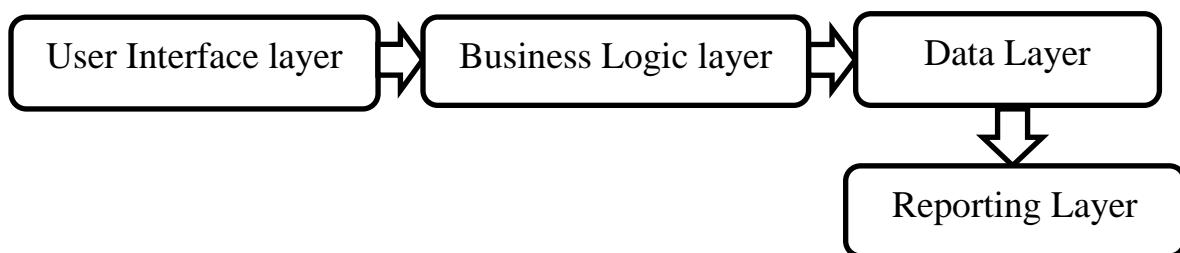
System Overview

The Jewellery Inventory CRM System integrates three core components — **Customer Orders**, **Items**, and **Billings** — within Salesforce to automate operations and improve efficiency.

Modules in the System

Module	Description
Customer Management	Handle customer information and communication.
Item Management	Stores data about each jewellery item(type,ornament,weight,price)
Order Management	Records customer orders,items and order dates.
Billing Management	Generates billing details for each order.
Report & Analytics	Generates reports connects billing,item,customer order,date.

System Architecture



Architecture Layers:

1. **User Interface Layer** – Salesforce App pages (Billings, Items, Customer Orders).
2. **Business Logic Layer** – Record-triggered Flows for automation.
3. **Data Layer** – Custom Objects and Relationships.
4. **Reporting Layer** – Reports and Dashboards.

Workflow Description

1. Customer places an order (Customer Order record).
2. Items are linked to that order.
3. Billing record is created for that item and order.
4. Record-triggered Flow sends an automated email to the customer.
5. Manager can view consolidated reports on sales and billing.

Roles & Responsibilities

Role	Responsibility
Salesforce Admin	Setup objects, relationships, and permissions.
Developer / Flow Builder	Create automation using Flow and Email Templates.
Tester	Validate billing creation, email triggering, and report output.
Project Lead	Supervise documentation, testing, and deployment.