

## IDEATION PHASE

<b>Date</b>	01 NOVEMBER 2025
<b>Team ID</b>	ID4CF9B0641590872B2C04C54C5A691F2E
<b>Project Name</b>	CRM Application for Jewel Management
<b>Maximum Marks</b>	2 MARKS

### PROJECT DEFINITION :

The Jewel Inventory System is a comprehensive software Solution designed to streamline and manage the inventory and sales processes of a jewellery store or a jewellery manufacturer. The system aims to provide an efficient and user-friendly solution to track and manage customers, products, orders, and pricing in a single integrated platform. The application automates sales tracking, order management, and customer follow-ups, It helps jewel store owners providing insights through reports and dashboards to improve business efficiency and customer satisfaction.

### ABSTRACT :

Jewellery stores handle numerous customer orders, item variations, and billing transactions daily. Managing these manually often leads to errors and time inefficiencies. This project automates the process using Salesforce CRM — from order creation to billing and email notifications.

A Record-Triggered Flow automatically sends an email to the customer when a billing record is created or updated, ensuring real-time communication. The system also allows for detailed report generation combining billing, item, and customer data for improved analytics and transparency.

### OBJECTIVES OF THE PROJECT :

- To build a custom CRM system for jewelry business management.

- To automate customer, order, and payment tracking using Salesforce tools.
- To manage multiple product categories like Gold, Silver, and Diamond efficiently.
- To generate reports and dashboards for better business insights.
- To improve customer engagement and sales performance through automation.

## **TOOLS & TECHNOLOGIES USED :**

- Salesforce Lightning Platform
- Record-Triggered Flow
- Custom Report Types & Dashboards
- Schema Builder
- Email Template & Automation
- GitHub (Documentation)

## **TARGET USERS :**

- Jewellery Store Owners
- Billing & Sales Managers
- Retail Staff / Admins
- Business Analysts and Auditors



