

## **Brainstorming**

### **Title: Ideation and Initial Conceptualization**

#### **Objective:**

To generate creative and actionable ideas for automating and managing a jewelry business using Salesforce. The focus is on making day-to-day tasks—such as inventory tracking, customer management, order processing, and billing—more efficient and scalable.

#### **Key Discussion Areas:**

##### **1. Challenges in Current Workflow:**

- Manual inventory tracking using notebooks or spreadsheets
- Separate tracking of gold and silver items with no unified system
- Delay in updating billing and customer records
- Inaccessibility of real-time insights for decision-making

##### **2. Feature Brainstorming:**

- Use of Salesforce custom objects to represent Jewel Customer, Item, Price, Order, and Billing
- Creation of dedicated page layouts for Gold and Silver items
- Record-triggered flows to automate email notifications upon billing
- Use of field dependencies to conditionally display fields (e.g., expected return days based on priority)
- Visual dashboards to allow stakeholders to monitor business KPIs in real time
- Summary reports for stock levels, customer orders, and revenue trends

##### **3. Technical Brainstorming:**

- Leveraging Lightning App Builder for custom UI
- Utilizing validation rules for data accuracy
- Setting up role-based access controls to maintain data security

#### **Conclusion:**

The initial brainstorming led to the idea of building a complete, modular Salesforce application for jewelry inventory and customer management with powerful analytics and automation features.