

Data Flows and User Stories

Date	2 November 2025
Team ID	NM2025TMID00606
Project Name	CRM Application for Jewel Management - (Developer)
Maximum Marks	4 Marks

DATA FLOW DIAGRAM & USER STORIES

Data Flow:

The data flow in the CRM Application for Jewel Management illustrates how data moves seamlessly between various modules within the Salesforce platform.

The process begins when a new customer is registered, capturing essential details such as name, contact number, and purchase preferences. Each customer record is linked to one or more order and jewellery item records, ensuring accurate tracking of transactions and personalized service.

When an order or appointment is created, it automatically connects to both the customer and relevant inventory items. As the order progresses, the assigned staff member updates the order status, which is reflected in real-time dashboards. Once the order is completed, the billing module retrieves the corresponding data to generate an automated invoice.

After successful payment, the customer can provide feedback, which is stored and analyzed to improve customer satisfaction and service quality. Salesforce reports and dashboards aggregate all this information to provide actionable insights for store managers and business administrators.

This structured data flow ensures smooth synchronization, eliminates redundancy, and enhances efficiency and transparency across all jewellery business operations.

S.No	User Role	User Story Description / Acceptance Criteria
1	Store Manager	As a Manager, I want to manage customer and jewelry item records to maintain accurate business data. The system should allow adding, editing, and linking customers with their orders and jewelry items for easy tracking and service management.
2	Sales Executive	As a Sales Executive, I want to book customer appointments and record custom jewelry orders efficiently. The system should enable the creation of new orders and appointments with status tracking and automated notifications
4	Inventory Staff	As an Inventory Staff member, I want to update jewelry stock levels when an order is confirmed or completed. The system should automatically update stock quantities and notify the manager when items reach a minimum threshold.
5	Manager	As a Manager, I want to review invoices and customer feedback to evaluate sales performance. The system should generate automated invoices and compile customer feedback reports for analysis.

User Stories Overview:

User stories define the core functional requirements of the CRM Application for Jewel Management from the perspectives of store managers, sales executives, and inventory staff. These stories focus on managing customer data, tracking orders, updating inventory, generating invoices, and reviewing feedback. They guide the development process, ensure

requirement clarity, and enhance collaboration between business stakeholders and developers, ensuring a customer-centric, efficient CRM system.

Solution Architecture:

