

Project Title:CRM application for jewel management

Project designing phase

Here's a clear and structured explanation of the **Designing Phase** for your **CRM Application for Jewel Management Project** 

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## CRM Jewel Management Application — Designing Phase

### Objective

The **designing phase** focuses on creating detailed blueprints for how the CRM system will look, function, and integrate. It bridges the gap between planning and development by turning requirements into a structured, visual, and technical design.

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### 1. System Architecture Design

Defines how different components of the application interact.

- **Architecture Type:** MVC (Model-View-Controller)
  - **Platform:** Salesforce CRM / Custom Web CRM
  - **Modules:**
    - Jewel Customer Management
    - Inventory Management
    - Sales & Orders
    - Supplier Management
    - Reports & Dashboards
    - User Management & Security
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### 2. UI/UX Design

Focus on how users will interact with the system.

- **Wireframes / Mockups:**
  - Home Dashboard (KPIs, Notifications)
  - Customer Record Page
  - Jewel Inventory Page
  - Sales Order Entry Form

- Reports & Dashboard Screen
  - **Design Goals:**
    - Simple and elegant interface
    - Easy navigation
    - Responsive layout for mobile and desktop
    - Quick access to frequently used modules
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## 3. Data Model Design

Defines how data will be stored and related.

Object	Description	Key Fields	Relationships
Jewel Customer	Stores customer information	Name, Contact, Address, Purchase History	One-to-Many with Orders
Jewel Item	Details of jewels (type, weight, purity, price)	Item Code, Type, Carat, Price	Many-to-One with Inventory
Order	Records of customer purchases	Order ID, Date, Total Amount	Many-to-One with Customer
Supplier	Supplier details for stock replenishment	Supplier ID, Name, Contact	One-to-Many with Inventory
Inventory	Tracks stock of jewels	Item ID, Quantity, Availability	Linked to Jewel Item & Supplier

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## 4. Process Flow Design

Maps how data and actions flow in the system.

### Example Process: “Customer Purchase Flow”

1. User searches/selects customer.
2. Selects jewel item(s) from inventory.
3. Generates invoice/order.
4. System updates inventory automatically.
5. Generates receipt and updates customer purchase history.

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## 5. Security & Access Design

Defines how data access and permissions are managed.

- **Roles:** Admin, Sales Executive, Inventory Manager
  - **Profiles & Permission Sets:**
    - Admin – Full Access
    - Sales Executive – Customer & Order Access
    - Inventory Manager – Jewel & Supplier Management
  - **Record-Level Security:** Sharing rules and role hierarchy
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## 6. Reports & Dashboard Design

- **Reports:**
    - Daily Sales Report
    - Top Selling Jewels
    - Customer Purchase Trends
    - Low Stock Alerts
  - **Dashboards:**
    - Sales Performance Overview
    - Inventory Summary
    - Revenue by Jewel Type
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## 7. Integration Design (Optional)

- **External Payment Gateway** for online payments
  - **SMS/Email Service** for customer notifications
  - **Accounting System Integration** for invoices and ledgers
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## 8. Design Deliverables

At the end of this phase, you should have:

- UI/UX mockups
- ER Diagram (Data Model)

- Process Flow Diagrams
- Role & Permission Matrix