

PROPOSEDSOLUTION

Date	03 NOVEMBER 2025
TeamID	NM2025TMID04143
ProjectName	CRMApplicationforJewelManagement-(Developer)
MaximumMarks	2Marks

ProposedSolutionTemplate:

TheCRMJewelManagementSystemisacloud-basedapplicationdevelopedon the Salesforce low-code platform. Its purpose is to streamline and automate highvalue sales, custom orders, and service processes for a jewelry business. The system replaces manual inefficiencies with structured, automated workflowstoensuredataaccuracyandenhancedcustomersatisfaction.

Module	ModelSummary	KeyWorkflow
1. Customer Management	Centralizes customer profiles,saleshistory,and links them directly to the preciousitemstheyown.	StaffcreateaNew Customer Details record, whichvalidatesmandatory fields and links the customer to any immediate sales/item records.

2. Service Management	Manage the full service lifecycle, including repairs, custom orders, and appraisals. It tracks the specific item, service type, and the jeweler assigned.	Staff use the Booking Appointment model to schedule service. This automatically creates a linked New Service record to track
Module	Model Summary	Key Workflow
		work performed and current status.
3. Billing and Payment	Ensures transparent financial closure for high-value transactions. Automates final invoice generation, recording complex payment types, and collecting customer feedback.	Staff initiate the New Billing details and feedback process, which calculates the final total and records payment status, ensuring a high Execution Success Rate (98%).
4. Reporting and Analytics	Provides managers with real-time, consolidated dashboards to monitor key business metrics.	Enable tracking of sales trends, jeweler productivity, item turnover rate, and service efficiency for resource optimization.