PROJECTPLANNING

Date	03 NOVEMBER 2025
TeamID	NM2025TMID04143
ProjectName	CRMApplicationforJewelManagement- (Developer)
MaximumMarks	5Marks

Projectplanning:

This plan outlines the agile development for the CRM Jewel Management SystemontheSalesforcelow-codeplatform.Itfocusesonautomatinghigh- value sales, service, and inventory operations for a jewelry business.

1. ProjectScopeandObjectives:

- **Scope:**Developanend-to-endsystemmanagingCustomerProfiles, PreciousItemInventorylinking,Service/RepairBookingandTracking, and Financial Billing.

- **Objective:**Theprimarygoalistoautomatemanualprocessestoensure data accuracy and achieve high transactional integrity.

- **SuccessMetric:**Thesystemmustachievea98%ExecutionSuccessRate and a 95% Confidence Score in automated logic for all critical transactions.

2. DevelopmentPhases:

Theprojectusesaniterative,agileapproachtodeliveraMinimumViable Product (MVP) quickly:

- **Phase1:Planning&Setup:**Definethesolutionarchitecture,setupthe Salesforce development environment, and finalize all testing benchmarks.

- **Phase2:CoreModuleDevelopment(MVP):**Developandunit-testall High-Priority Modules (Customer, Service, Billing), focusing on foundational automation rules.

- **Phase 3: Integration & Testing:** Conduct Performance Testing (Load/Stress)andUserAcceptanceTesting(UAT).IntegrateMedium Priority enhancements after validation.

- **Phase4:Deployment&Closure:**Deploythefullytestedsystemto production, conduct end-user training, and complete project documentation.

3. FeaturePrioritization:

Featuresareprioritizedbasedontheiressentialbusinessvaluetoensure critical operations are addressed first:

- **HighPriority:**

  - **Customer & Billing:** Implementation of the New Customer Details creationmodelandtheNewBillingdetailsandfeedbackmodelfor transaction closure.

  - **Service Management:** Implementation of the Booking AppointmentandNewServicerecordsmodelsfortracking repairs/custom work performed by the Jeweler.

- **MediumPriority:**

  - **Inventory&Staff:**Detailedtrackingofpreciousstone specifications(GIA,Carat,Cut)andautomatedtaskassignmentto staff based on workload.

- **LowerPriority :**

  - **Reporting:** Building the Reporting and Analytics Module and implementingautomatedcustomernotifications(e.g.,'Repair Complete').