

PROPOSED SOLUTION

Date	03 NOVEMBER 2025
TeamID	NM2025TMID04143
ProjectName	CRM Application for Jewel Management-(Developer)
MaximumMarks	2 Marks

Proposed Solution Template:

The CRM Jewel Management System is a cloud-based application developed on the Salesforce low-code platform. Its purpose is to streamline and automate high-value sales, custom orders, and service processes for a jewelry business. The system replaces manual inefficiencies with structured, automated workflows to ensure data accuracy and enhanced customer satisfaction.

Module	Model Summary	Key Workflow
1. Customer Management	Centralizes customer profiles, sales history, and links them directly to the precious items they own.	Staff creates a New Customer Details record, which validates mandatory fields and links the customer to any immediate sales/item records.

2. Service Management	Manages 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 work performed and current status.
Module	Model Summary	Key Workflow
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.	Enables tracking of sales trends, jeweler productivity, item turnover rate, and service efficiency for resource optimization.