

## Requirement Analysis Phase

### Solution Requirements

#### 1. Introduction

The Solution Requirements phase defines the functional and non-functional needs of the Salesforce CRM for Jewel Management system. It ensures that the proposed solution meets business goals by clearly outlining what the system must do (functional requirements) and how it must perform (non-functional requirements).

This section bridges the gap between user expectations and technical implementation, ensuring that the CRM system is efficient, scalable, and user-friendly.

#### 2. Functional Requirements

Functional requirements describe the key features and operations that the system must perform to support the jewelry business. These requirements define how users interact with the CRM, how data is managed, and how automation enhances business workflows.

No.	Functional Requirement	Description
1	Customer Management	The system must allow adding, viewing, updating, and deleting customer details, including contact, email, and purchase information.
2	Item Management	The system should support creating and maintaining jewelry item records with fields such as type, material, quantity, and price.
3	Order Processing	The CRM must link customers to items and record sales orders, updating inventory automatically.
4	Validation Rules	The system should enforce data accuracy by validating required fields and input formats.
5	Automation using Flows	Automated workflows must update records, send alerts, and trigger notifications when certain conditions are met (e.g., low stock).
6	User Role and Access Control	Role-based permissions should restrict or grant access to specific records and functionalities for Goldsmiths, Workers, and Admins.
7	Reporting and Dashboards	The CRM should generate reports and dashboards to visualize sales trends, customer data, and inventory status.
8	Trigger Implementation	Apex triggers must automate backend logic such as updating totals or generating order summaries.

### **3. Non-Functional Requirements**

Non-functional requirements define the performance standards, usability goals, and operational qualities of the system. These ensure that the CRM operates efficiently and delivers a smooth experience to all users.

No.	Non-Functional Requirement	Description
1	Performance	The system should process and display data quickly, ensuring minimal load time for records and reports.
2	Scalability	The CRM must support future expansion, including additional modules or increased data volume.
3	Security	Sensitive business and customer information should be protected through Salesforce's role-based security and permission sets.
4	Usability	The user interface must be intuitive, enabling easy navigation and record management for non-technical users.
5	Reliability	The CRM should maintain consistent performance with minimal downtime or data loss.
6	Maintainability	The system must be easily configurable and upgradable through Salesforce tools without affecting existing operations.
7	Data Integrity	All customer, item, and order data must remain accurate, consistent, and validated through automated rules.
8	Compliance	The system must adhere to Salesforce standards and organizational policies for data handling.

### **4. Summary**

The Solution Requirements phase ensures that the Salesforce CRM for Jewel Management system is both functionally robust and technically reliable.

By combining core CRM capabilities—like automation, data management, and reporting—with strong performance and security standards, the solution provides a comprehensive platform for managing jewelry business operations efficiently and effectively.