

# 1. IDEATION PHASE

## 1.1 Problem Statement:

Traditional jewellery shops face problems like manual stock maintenance, lack of customer records, and inefficiencies in pricing and billing. There's also no integrated view of customer interactions. This leads to errors, delayed decision-making, and customer dissatisfaction.

In the ideation phase of the CRM Jewel Management Application, the objective is to conceptualize a unified digital platform that centralizes all major operational functions of a jewellery business, combining customer relationship management with stock handling, pricing automation, sales conversion, and post-sale life-cycle tracking. Jewel business still works highly manual, with paper bills, WhatsApp quotes, unlinked customer history, no traceability of stones or gold price variation, and no structured customer loyalty system. The goal of this application is to transform these processes into a smart CRM-powered system. The application idea focuses on maintaining dynamic inventory of gold, silver, diamonds and finished jewellery items with automatic price calculation based on live market rate and making charges. Customer master data will store buying patterns, quotations, previous purchases, special occasions, festivals, and reminders for targeted marketing and personalized promotions. The system will enable the sales executive to generate digital quotations, reserve items, take advance booking, manage custom orders, maintain vendor purchase pricing and profit margin monitoring. Integrations with GST invoicing, payment gateway, and secured customer data storage will be considered. The ideation also includes business expansion use cases like multi-store branch sync and centralized dashboard analytics. The main purpose is to design a modern CRM based jewellery management platform that reduces manual work, avoids miscalculations, improves customer experience, builds loyalty, and increases sales conversion using structured data.

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Many small to mid-sized jewellery retailers struggle with managing customer relationships, tracking sales, handling special orders, and maintaining inventory. Current manual systems or generic software often fall short of addressing the industry's unique needs.

## **1.2 Empathy Map Canvas:**

### **Think & Feel**

- “Are we missing out on leads because we’re not following up?”
- “I need to know who our high-value customers are.”

### **Hear**

- “The customer wasn’t happy with the delay in their custom order.”
- “Can we send reminders for anniversaries and birthdays?”

### **See**

- Registers with scribbled orders.
- Multiple Excel sheets for billing and inventory.

### **Say & Do**

- “Call them about the pendant order tomorrow.”
- “Print out last year’s top customers list.”

### **Pain**

- Losing customers due to lack of follow-up.
- No real-time inventory tracking.

### **Gain**

- Higher customer satisfaction.
- More repeat purchases via automation.

## 1.3 Brainstorming:

The brainstorming phase focused on collecting diverse ideas from stakeholders—including jewel store owners, sales representatives, developers, and end-users—to define potential solutions and functionalities required in the CRM application. This collaborative ideation process aimed to understand the operational bottlenecks in the jewelry business and how Salesforce's cloud ecosystem could streamline them.

Ideas collected during brainstorming:

- Use of custom objects for Items, Billing, Orders, and Customers.
- Automate stock management with flows.
- Dashboard for daily performance insights.
- Notifications for low inventory.
- Implement record-triggered and scheduled flows.
- Introduce validation rules to prevent data inconsistencies.
- Plan separate dashboards for different roles (sales, inventory, admin).

## 2. Requirement Analysis:

### 2.1 Customer Journey Map:

The customer journey map outlines the stages a customer experiences, from the first interaction to post-purchase engagement. It helps identify gaps and opportunities where the CRM can automate and enhance customer experience.

#### Awareness Stage

- Customer browses website or social media.
- CRM captures leads using Web-to-Lead forms.

#### Consideration Stage

- Customer visits the store or requests a catalog.
- Salesforce auto-assigns a sales representative.
- Email/SMS with product recommendations is triggered.

#### Purchase Stage

- Customer places an order (in-store or online).
- CRM logs order and creates a sales opportunity.
- Invoice is generated using built-in templates.

### **Delivery Stage**

- Customer receives order.
- CRM sends order tracking notifications and confirmations.

### **Post-Purchase Stage**

- Customer receives feedback form.
- Loyalty points are updated.
- Follow-up reminders for anniversaries, birthdays, etc.

## **2.2 Solution Requirements:**

Defines both the functional (what the system should do) and non-functional (how the system performs) needs to fulfill business goals.

- Real-time item stock tracking
- Dynamic pricing management
- Billing with automated tax calculations
- Comprehensive dashboards and reports
- Data security and accessibility
- Integration with communication tools (email/SMS)
- Record ownership for audit and traceability

## **2.3 Data Flow Diagrams:**

DFD illustrates how data moves between the system's components. This helps developers visualize dependencies and database interaction points.

### **Main Entities & Data Flow Points:**

1. Customer submits a product inquiry.

2. Data flows to CRM Interface (Form or App).
3. CRM creates or updates Customer Object.
4. CRM logs sale and updates Sales Record.
5. Inventory count is adjusted in the Inventory Object.
6. Reports are updated to reflect real-time sales and stock.

## 2.4 Technology Stack:

Defines the tools and platforms used to develop, deploy, and manage the CRM system in Salesforce.

- Platform: Salesforce Lightning Experience.
- Logic: Apex Triggers, Validation Rules, Flow Builder.
- UI: Lightning Tabs, Pages, Reports, Dashboards.
- Database: Salesforce Standard & Custom Objects.
- Integration: Email Templates, Scheduled Flows, Approval Processes.

## 3. PROJECT DESIGN

### 3.1 Problem Solution Fit:

**Problem:** Manual processes and lack of centralized tracking

**Solution:** Salesforce CRM system automating every major jewelry workflow

### 3.2 Proposed Solution:

**Five major custom objects:** Item\_\_c, Price\_\_c, Jewel\_Customer\_\_c, Customer\_Order\_\_c, Billing\_\_c

- Lightning app with navigation tabs
- Automated flows for inventory, billing, and notifications
- Dashboards visualizing sales, stock, and revenue performance

### 3.3: Solution Architecture:

#### Objects and Relationships:

- Jewel\_Customer\_\_c ↔ Customer\_Order\_\_c ↔ Billing\_\_c ↔ Item\_\_c ↔ Price\_\_c
- Lookup and Master-Detail fields used to link records
- Formula fields for auto-calculations (e.g., total billing amount)
- Validation rules for quantity and price limits
- Record Types to distinguish Gold, Silver, and Diamond workflows

## **4. PROJECT PLANNING AND SCHEDULING**

### **4.1 Project Planning:**

The planning and scheduling phase involves defining the project's timeline, scope, team responsibilities, tools, and milestones. It ensures the project stays on track and aligns with business goals while delivering the CRM application in an efficient, scalable, and phased manner.

- Week 1: Requirement gathering, Usecase and ER Diagrams
- Week 2: Custom object creation, Page Layouts and Tab Setup
- Week 3: Flows and Automation Setup, Validation Rules
- Week 4: Reports and Dashboards, Testing and Review
- Week 5: Final Deployment, Documentation and User Training

## **5. PROJECT DEVELOPMENT PHASE - SALESFORCE GUIDED PROJECT**

The development phase is the backbone of the CRM application, where core functionalities were implemented using Salesforce's declarative tools and programmatic capabilities. This phase was conducted in iterative sprints, following Agile methodology, and broken into several key activities.