

Ideation Phase Brainstorm & Idea Prioritization

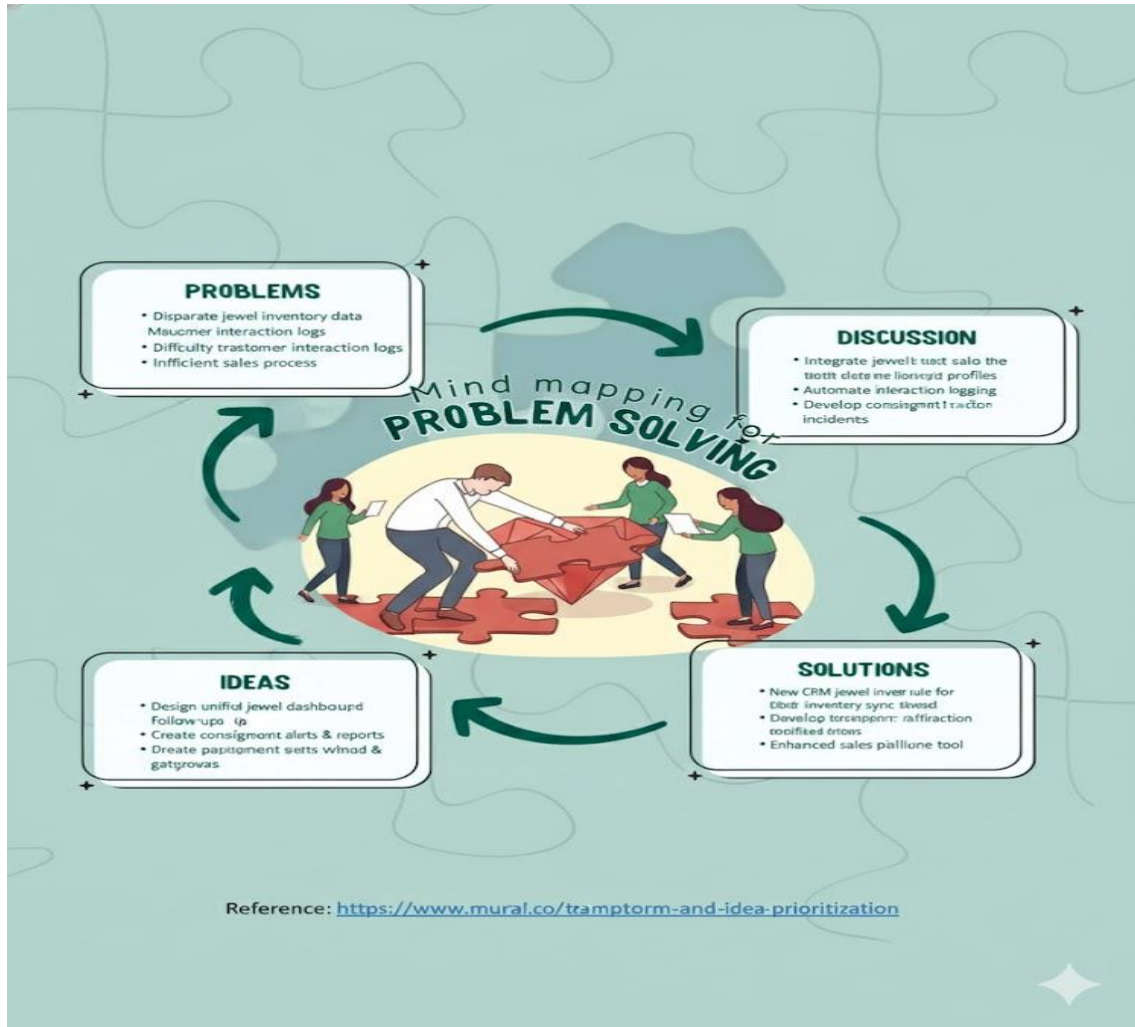
Date	02 NOV 2025
Team ID	NM2025TMID05622
Project Name	CRM Application for Jewel Management

Prevent Inventory Mismanagement:

The prevention in this project focuses on eliminating major issues faced by jewellery businesses such as data inconsistency, inventory mismanagement, and lack of centralized customer information. It aims to prevent human errors in billing, duplication of data, and unauthorized access by introducing an automated and secure CRM environment. The CRM Application for Jewel Management demonstrates this prevention effectively through the use of Salesforce tools and features. Custom objects are designed to organize data into clear categories such as Jewels, Customers, Orders, Billing, and Prices, ensuring accuracy and consistency. Validation rules are implemented to prevent users from entering incorrect or incomplete data, while automation using Flows and Apex Triggers reduces manual effort and errors in calculations or record updates.

Additionally, user roles and permissions are carefully configured to maintain data security and restrict unauthorized access. Dashboards and reports further strengthen the system by providing real-time insights for better decision-making. Overall, the project demonstrates prevention by creating a centralized, automated, and secure Salesforce-based system that ensures efficient and error-free jewel management operations.

Step-1: Team Gathering, Collaboration and Select the Problem Statement:



Step 2: Brainstorm, Idea Listing, and Grouping:



Fig2: Image that describes the work done by teammates.

✓ **Brainstorm:**

Each member shared ideas to address the identified challenges — from automation flows to security and data analytics — to improve the jewellery business workflow.

✓ **Idea Listing:**

1. Create custom Salesforce objects (Jewels, Orders, Customers, Billing, Prices).
2. Automate billing and notifications using Salesforce Flows and Triggers.
3. Implement validation rules to ensure accurate data entry.
4. Use dashboards and reports for performance analysis.
5. Create role-based access (Gold Smith, Worker) for data security.
6. Provide page layouts for different jewel categories (Gold, Silver).

✓ **Grouping:**

- **Data & Structure:** Custom Objects, Fields, Tabs.
- **Automation:** Triggers, Flows, Validation Rules.
- **Security:** Profiles, Roles, Permissions.
- **Analytics:** Reports, Dashboards.
- **User Experience:** Page Layouts, Lightning App Customization.

✓ **Key Explanation:**

- Automation improves accuracy and reduces manual work.
- Security ensures that high-value data is handled safely.
- Analytics enables business owners to make informed decisions.
- User Experience enhances productivity and simplifies navigation.

Step 3: Idea Prioritization:

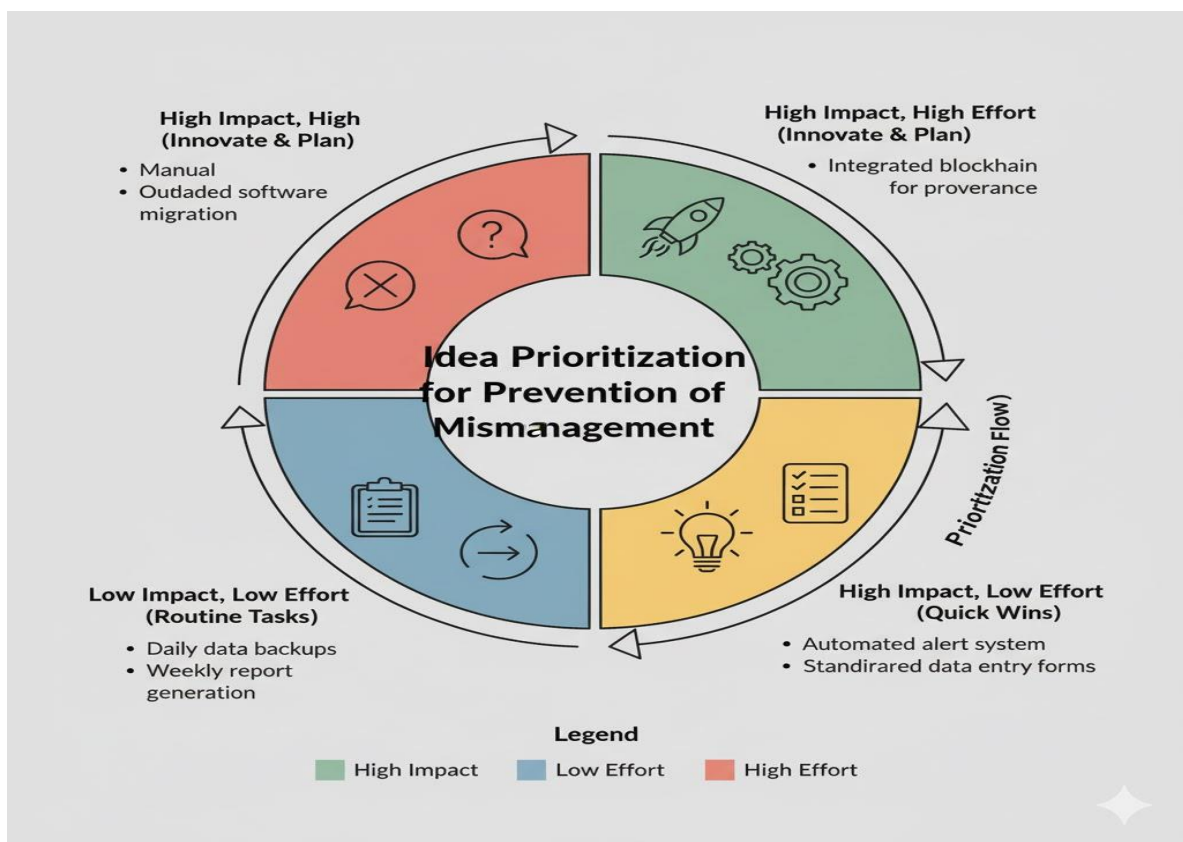


Fig3: Image of steps to prevent user deletion.

Prioritizing automation and security ensures the system's reliability and scalability. Custom objects form the foundation, while dashboards provide real-time monitoring. The chosen approach guarantees a balanced and efficient CRM system for jewellery management.