

Ideation Phase

Brainstorm & Idea Prioritization

Template

Date	3 NOVEMBER 2025
Team ID	NM2025TMID06540
Project Name	CRM Application for Jewel Management - (Developer)
Maximum Marks	4 Marks

Prevent user deletion if assigned to an incident Template :

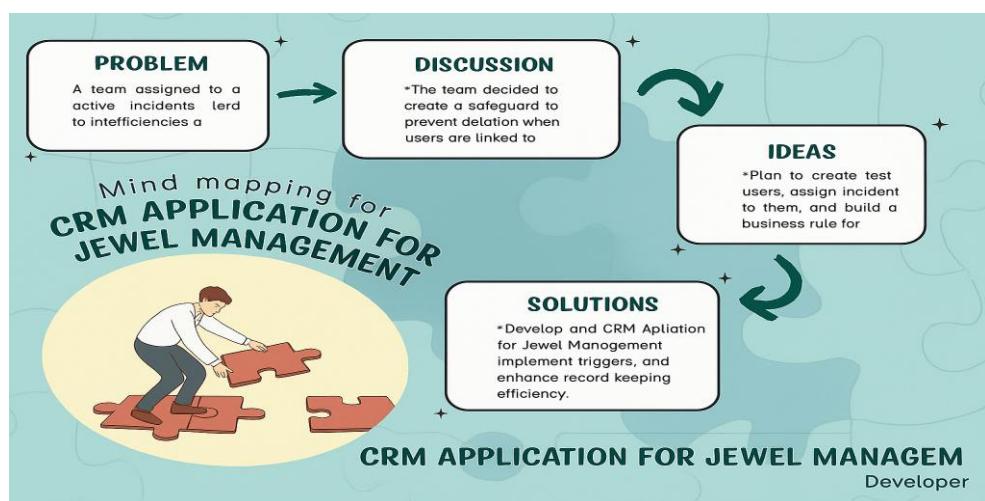
This guided implementation demonstrates how to prevent the deletion of users who are assigned to active incidents in the CRM Application for Jewel Management.

The solution ensures data integrity and protects operational continuity by blocking deletion of any CRM user still linked to customer issues, sales tasks, or service incidents.

- It starts with the creation of sample users, customers, and incidents assigned to those users. A business rule (implemented using an Apex trigger) enforces a validation that restricts deletion if any incident remains assigned to a user. This ensures that crucial relationship data is preserved, preventing accidental removal of staff who are still responsible for open records. Data accuracy
- Operational control
- Improved accountability in customer service

By breaking the task into smaller steps (design, trigger creation, testing), the project ensures reliable and maintainable CRM processes.

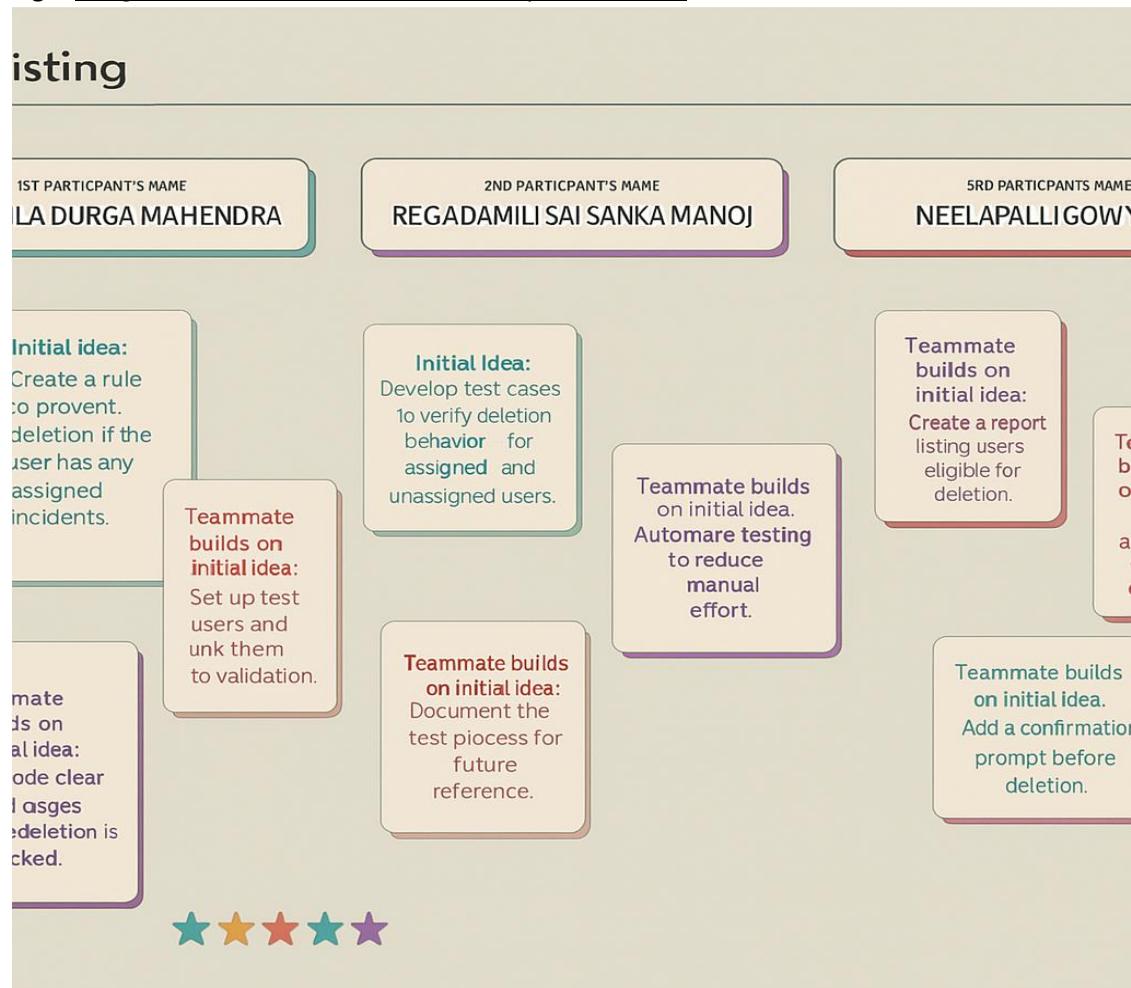
Step-1: Team Gathering, Collaboration and Select the Problem Statement:



Reference: <https://www.mural.co/templates/brainstorm-and-idea-prioritization>

Step-2: Brainstorm, Idea Listing and Grouping:

Fig2: Image that describes the work done by teammates.



Brainstorm:

To design and develop a **Salesforce CRM Application** tailored for jewelry business operations that automates pricing, billing, order management, and customer relations — ensuring better data accuracy, faster workflows, and customer satisfaction.

Idea Listing:

Create a centralized Customer Management module that stores customer information (name, contact, address) and links it to orders and billing records.

Grouping:

Similar ideas are organized into categories to identify patterns, highlight priorities, and simplify decision-making.

Action Planning:

Chosen ideas are turned into clear steps with assigned responsibilities and timelines.

Step-3: Idea Prioritization:

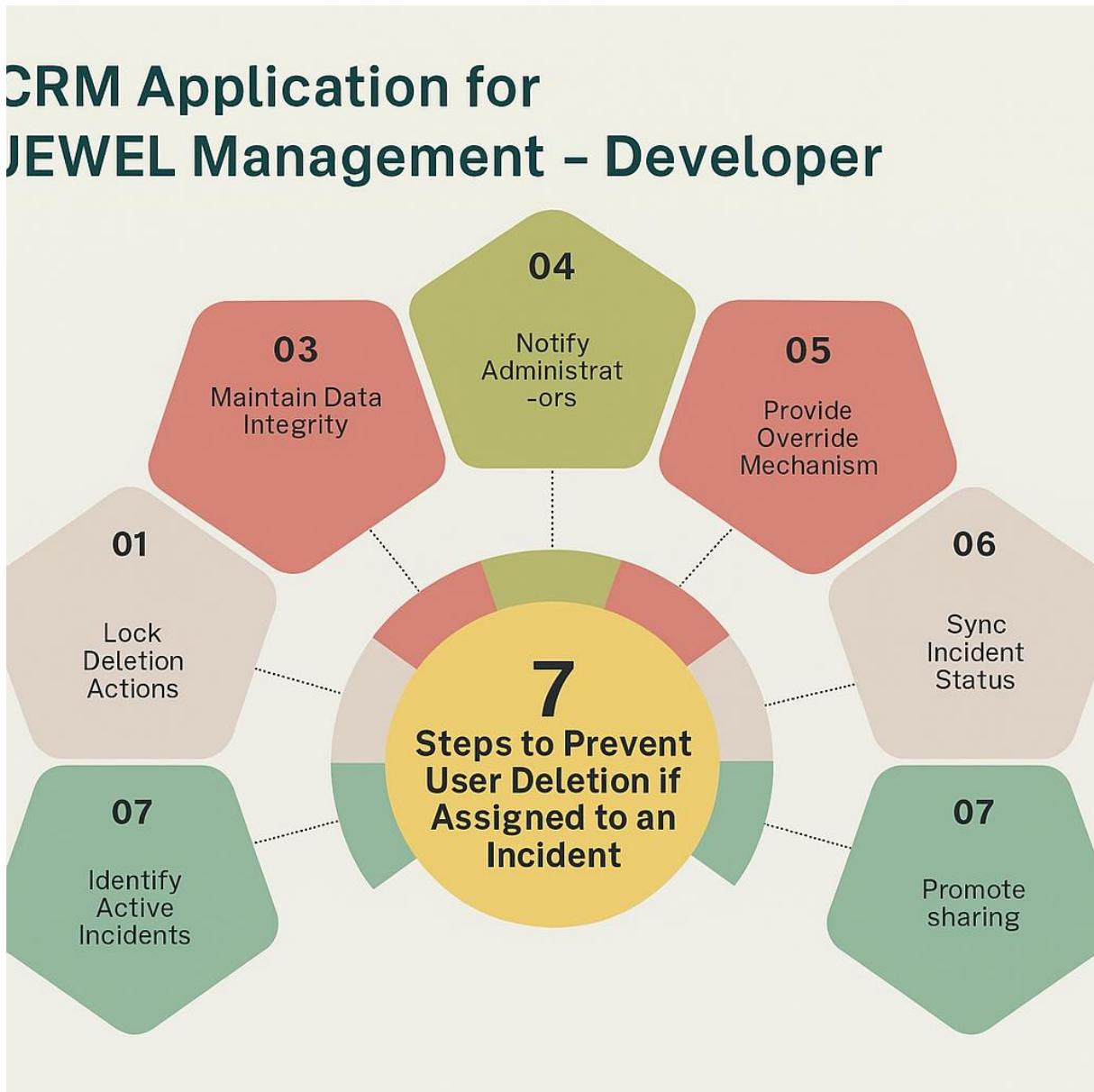


Fig3: Image of steps to prevent user deletion.

Idea Prioritization:

After brainstorming and listing ideas, the team analyzed each suggestion based on **impact**, **feasibility**, **effort**, and **importance** to the jewelery business CRM workflow.

The goal was to focus on automation, data integrity, and security — ensuring a complete and scalable Salesforce solution.