

# CRM Application for Jewel Management - (Developer)



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# Requirements

- ✘ Functional requirements (e.g. “Track jewellery stock by type, material, jeweller, weight etc.”; “Handle job cards for customizing / repair”; “Sales workflow: quote → sale → delivery”; “Customer account history”; etc.), Non-functional (performance, security, data privacy, scalability).



# Overview

- ❏ Purpose of the CRM, who are the users (Admin, Salespeople, Inventory Manager, etc.), scope (what the jewel management includes: stock, job cards, sales orders, customer management, supplier management, reporting etc.).



# Salesforce Configuration

- ✘ Custom Objects & Fields, Page Layouts, Record Types, Profiles / Permission Sets, Sharing Model, Validation Rules, Workflow Rules / Process Builders / Flows, Approval Processes.



# Data Model

- ✘ All custom / standard objects; fields (including field types), relationships (lookup / master-detail), keys, sharing rules. For example: JewellItem, InventoryTransaction, JobCard, Customer, Order, Supplier, etc. Possibly ER diagram.



# Automation & Business Logic

- ✘ Apex classes / triggers (if needed), Flows, Scheduled Jobs, Batch Apex (if large volumes), integration points (if integrating with external systems: e.g. supplier inventory, accounting, payment gateway).



# Maintenance & Monitoring

- ✘ Monitoring dashboards, error logging, performance tuning, user support, training, backup / data retention policies.



# Security

- ✘ Profiles, Permission Sets, Field Level Security, Sharing Rules, Role Hierarchy; also secure coding if using Apex; data encryption if needed; audit logs.

