S.VEERASAMY CHETTIAR COLLEGE OF ENGINEERING AND TECHNOLOGY

(9526)

Department of Computer Science and Engineering

TITLE

Salesforce CRM Application for Jewel Management (Developer)

TeamID : NM2025TMID08211

Team Size:4

Team Leader : Vengateswari S

Teammember : Mallika G

Teammember : Madhu Meena C

Teammember : Rajapriya C

Submitted by:

S.Vengateswari

Reg no : 952622104053

NM ID : aut22svccse49

Certificate

This is to certify that the mini project report titled "Salesforce CRM Application for Jewel Management" is a bonafide record of work carried out by S.VENGATESWARI, Department of Computer Science and Engineering, S.Veerasamy Chettiar College of Engineering and Technology,puliangudi, in partial fulfillment of the requirements for the Naan Mudhalvan Mini Project during November 2025.

Guide: SIVASANKAR
Head of the Department: SIVASANKAR

Acknowledgement:

I would like to express my sincere gratitude to our Principal, S.Veerasamy Chettiar college of engineering and Technology,Puliangudi, and the management for providing all facilities to carry out this project. My heartfelt thanks to the Head of the Department and my guide SIVASANKAR for their continuous encouragement, guidance, and valuable suggestions throughout this project. I also thank my friends and classmates for their support and cooperation.

Abstract:

This project develops a CRM application on the Salesforce CRM platform for jewellery retail management. It centralises customer profiles (contacts, purchase history, preferences), tracks jewellery inventory (metals, stones, finished pieces), and automates sales workflows (leads, quotes, orders, billing). With built-in analytics and dashboards, the system empowers jewellery businesses to deliver personalised service, optimise stock and-flow, and make data-driven decisions. The outcome is improved customer loyalty, streamlined operations and better visibility—enabling retailers to compete more effectively in the digital age.

IDEATION PHASE:

- Track every customer's preferences, purchase history & special dates like birthdays using CRM.
- Monitor jewellery items (metal type, gemstones, weight, location) for real-time inventory visibility.
- Capture leads from store, online or WhatsApp and ensure timely follow-up to never miss a sale.
- Automate promotions for anniversaries, festivals or VIP customers to boost repeat business.
- Manage custom orders (design → production → delivery) in a streamlined workflow.
- Provide after-sales services (polishing, resizing) with CRM-triggered reminders for higher loyalty.
- Offer multi-store dashboards: sales trends, inventory ageing, top items and store comparisons.
- Integrate CRM with POS/e-commerce/ERP so data is unified and decisions are data-driven. doforttech.com+2superagi.com+2.
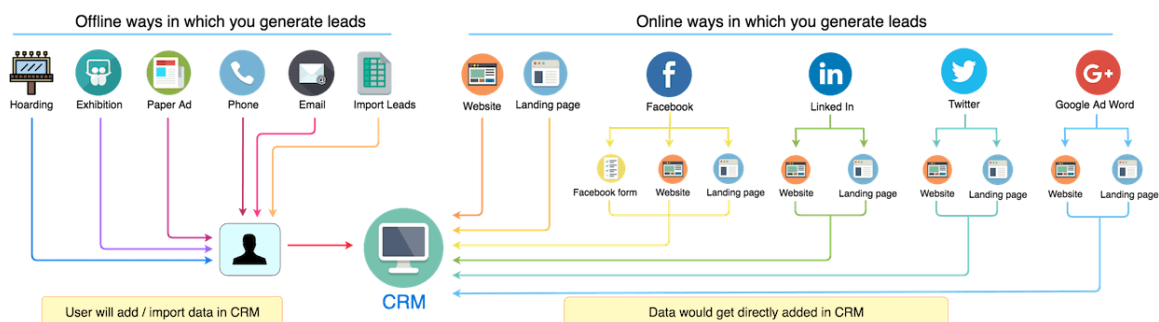
PROJECT PLANNING PHASE:

- Define project scope: what business goals (e.g., lead-to-sale, inventory tracking) the jewellery business will address, and what falls out of scope. dhruvsoft.com+1
- Assemble the team & governance: appoint the executive sponsor, project manager, business analyst, tech lead & change-lead. Attain Partners+1
- Create timeline with milestones & phases (e.g., discovery, design, build, test, go-live) and choose methodology (Agile/Waterfall/hybrid). Get Generative+1
- Allocate budget and resources: estimate cost, staff, tools, and set realistic buffers for data migration and integration. innovadeltech.com+1
- Identify risks & mitigation: data quality, user adoption, integration with ERP/POS, change management. crm.consulting
- Define key deliverables & success metrics: e.g., customer 360-view implemented, inventory real-time dashboard live, repeat-purchase rate up by X%. Get Generative
- Plan for data migration & governance: review legacy data, map to Salesforce schema, establish rules for cleanliness and access. Medium+1

- Communication & change management: prepare stakeholder engagement plan, training sessions, regular status updates to ensure adoption. Attain Partners+1

PROJECT DESIGN PHASE:

- Map jewellery-specific business processes (e.g., custom order → production → delivery, inventory of precious metals/gems) and document with process flows.
- Define data model: custom objects (e.g., JewelleryItem, GemstoneBatch, ServiceJob), fields (weight, purity, store location), relationships, record types.
- Apply UX design principles: keep interface clear, efficient, consistent, and simple. Trailhead+2Salesforce Admins+2
- Determine out-of-the-box vs custom: leverage standard Salesforce objects/functions where possible, only build custom when needed. Salesforce Ben+1
- Design integration architecture: e.g., link with ERP/manufacturing, POS, metal rate feed. Use proven integration patterns. resources.docs.salesforce.com
- Prototype key screens/workflows (e.g., sales rep mobile item lookup, customer after-sales service job logging) and get user feedback.
- Define configuration: security model (roles, profiles), sharing rules, page layouts, automation (flows, validation rules) – keep it maintainable.
- Prepare design sign-off: get stakeholders to approve the design artefacts (data model, processes, UX mock-ups, integration approach) before build begins.

REQUIREMENT ANALYSIS:

Offline ways in which you generate leads — Hoarding, Exhibition, Paper Ad, Phone, Email, Import Leads. Online ways in which you generate leads — Website, Landing page, Facebook, Linked In, Twitter, Google Ad Word. User will add / import data in CRM. Data would get directly added in CRM. CRM.

- Capture and store customer profiles: contact details, purchase history, preferences, special dates.

- Track jewellery inventory: metal type, gemstone specs, weight/purity, store-location, status (available/reserved/sold).
- Manage sales & custom orders: lead → quote → design → production → delivery workflow.
- After-sales service tracking: resizing, polishing, repair jobs linked to customer and item.
- Marketing & loyalty: send personalised offers on birthdays/anniversaries, segment VIPs, track campaign results.
- Dashboards & reporting: sales by store, inventory ageing, customer lifetime value, lead-to-order conversion.
- Integration and data quality: connect with POS/ERP/e-commerce; ensure accurate and clean data.
- Security & usability: mobile access for staff, role-based access, simple UI for high-value, complex items.

PERFORMANCE TESTING:

- Use a full-copy sandbox that mirrors production for realistic load testing. Salesforce Developers+1
- Define key workflows (e.g., inventory lookup, order placement, service job logging) and measure response times.
- Simulate concurrent users and high data volumes (many items, many customers) to stress test the system. Salesforce Admins
- Test both UI interactions and API calls/integrations (inventory feed, ERP sync) for bottlenecks. Salesforce Developers
- Establish baseline metrics (median, 95th percentile) and compare after changes to detect degradation. Salesforce Developers
- Prioritize realistic "think time" between actions and mimic real user behaviour (store staff, sales reps). Salesforce Developers
- Monitor memory/CPU usage, queued jobs, workflow automation impacts, especially for custom jewellery workflows.
- Document the plan, scenarios, tools, test data volumes, and get the environment approved (especially for Salesforce multitenant). scribd.com

Table of Contents

1.Introduction:

In the jewellery retail sector, every interaction and every piece of inventory counts.This project builds a tailored CRM system on the Salesforce CRM platform for jewellery businesses.It will centralise customer profiles—contact details, purchase history, and preferences.

It will also manage inventory of metals, stones and finished jewellery, giving real-time visibility and alerts.The sales-to-billing lifecycle (lead → quote → order → invoice) will be streamlined and automated.With analytics dashboards and custom workflows, the business moves from reactive to proactive operations.The result: stronger customer relationships, faster sales, smarter stock use and data-driven growth.

2. Problem Statement:

Key pain points faced by jewellery retailers: e.g., manual processes, fragmented customer data, inventory mis-match Impact of these issues on business (sales losses, customer dissatisfaction, operational inefficiencies).Why existing generic systems are insufficient for jewellery-specific requirements.The specific gap this project aims to fill.

3. Objectives:
- Primary objective: To build a CRM application on the Salesforce CRM platform tailored for jewellery management
- Secondary objectives:
- Centralise customer data (contacts, purchase history, preferences)
- Automate sales workflow (lead → quote → order → invoice)
- Integrate inventory tracking for metals, stones, finished jewellery
- Provide dashboards/analytics for business insights
- Improve customer retention, operational efficiency, and decision-making

4. System Study:

- Current system / process analysis: how jewellery retail businesses currently manage customer data, inventory, sales workflow
- Requirements gathering: functional requirements (what the system must do) and non-functional requirements (performance, security, usability)

- Stakeholder analysis: who are the users (sales staff, store manager, inventory manager, admin etc)
- Use case modelling / business process flows: lead capture, sales, billing, inventory update, after-sales service
- Data flow diagrams / context diagram (optional)

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5. Feasibility Study:

- Operational feasibility: Are staff capable of adopting the new system? How will it fit into existing workflows?
- Technical feasibility: Does Salesforce support the required customisation (objects, flows, integration, mobile access)? Is infrastructure sufficient?
- Economic feasibility: Cost-benefit analysis (licence costs, training, time savings, increased sales). Industry data shows jewellery retail software market growing— for example, the jewellery store-management software market is projected to grow at ~11.9% CAGR. Credence Research Inc.
- Schedule feasibility: Time-line for project phases, deployment within business constraints
- Risk assessment: Identify risks (data migration issues, user resistance, integration challenges) and mitigation strategies.

6. System Design:

- Overall architecture: high-level view of system components (Salesforce front-end, custom objects, inventory database, reporting/analytics module).
- Database / data model: custom objects/entities such as Customer, Lead, Order, InventoryItem, Gem/Stone, Metal, FinishedProduct.
- User interface design: screen layouts, navigation flows (e.g., lead entry screen, quotation screen, inventory dashboard).
- Workflow and business logic: e.g., when a lead is converted to customer, quotation created → order placed → payment/invoice generation, inventory reduced accordingly.
- Security & access control: roles & profiles in Salesforce, data visibility, permissions.
- Integration design (if applicable): e.g., linking with POS, external inventory system, e-commerce channel.

- Reporting/dashboard design: key metrics, KPIs, visualisations

7. Modules Description:

- Customer/Lead Management Module: capture leads, convert to customers, manage   contact history, preferences
- Inventory Management Module: track raw materials (metals, stones), finished jewellery, stock levels, alerts for low/high stock
- Sales & Billing Module: quotation creation, order processing, invoice generation, payment tracking
- After-Sales/Service Module: warranty tracking, polishing/servicing reminders, customer feedback
- Analytics & Dashboard Module: sales trends, customer segmentation, inventory turnover, performance metrics
- Marketing & Loyalty Module (optional): campaign management, birthday/anniversary greetings, loyalty rewards
- For each module: functionality, inputs, outputs, user roles, workflows.

8.Implementation:

- Platform setup: Salesforce environment (sandbox, production), custom object creation, field customisation

- Data migration: import existing customer/inventory data, mapping fields, cleansing data

- Customisation/automation: build flows, process builder, Apex triggers (if needed) for business logic

- User interface configuration: page layouts, Lightning components (if applicable)

- Integration (if any): connecting inventory/POS systems, external APIs

- User roles & training: define user profiles, train staff, provide user manuals

- Deployment strategy: sandbox testing → user acceptance testing → production launch

9. Tools and Technologies Used:

- Platform: Salesforce CRM (Sales Cloud/Service Cloud, Lightning Experience)
- Customisation tools: Salesforce Flow, Process Builder, Apex (if required)
- Reporting/Analytics: Salesforce Reports & Dashboards, possibly Einstein Analytics
- Data migration tools: Data Loader, Salesforce Import Wizard
- Version control/deployment: Salesforce Change Sets or DevOps tools (optional)
- Additional tools: Excel for requirement documentation, Visio/Draw.io for diagrams
- Technology environment: Cloud-based, mobile-friendly access
- Justification for each tool: why chosen, benefits

10. Testing:

- inventory-sales link), user acceptance testing (UAT)
- Test cases/specifications: e.g., create a lead → convert to customer → quotation → order → invoice, check inventory reduction
  - Testing strategy: unit testing (custom objects, flows), integration testing (Performance testing: check business scenario loads, number of users, data volumes
- Security testing: role-based access, data visibility, injection/prevention
- Bug tracking & resolution: test logs, defect tracking, retesting
- Sign-off criteria: acceptance by business user, meeting objectives

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11. Results and Discussion:

- Presentation of results: key metrics pre- and post-implementation (e.g., reduction in order processing time, increase in repeat purchases)
- Discussion of observations: what went well, what challenges were faced (user adoption, data quality)
- Comparison against objectives (from section 3)

- Limitations of the system: e.g., features not yet implemented, data migration issues, user training gaps
- Implications for the business: how the CRM impacts operations, customer experience, inventory management

12.conclusion:

- Recap of what was achieved by the project: summary of system built and its benefits
- Reflection on the value delivered: for jewellery business and for future scalability
- Final thoughts: how the system positions the business for future growth

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13. Future Enhancement:

- Possible improvements:
- AI-driven recommendations (customer preferences, upsell/cross-sell)
- Mobile app for field sales or home visits
- Omni-channel integration: e-commerce, social media, in-store POS
- IoT integration for real-time inventory (RFID for jewellery)
- Enhanced loyalty & reward programmes
- Roadmap for enhancements: short-term and long-term
- Scalability and maintainability considerations

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14. References

- List all books, research papers, articles, case studies, websites that were referenced
- Follow a standard citation style (APA/IEEE)
- For example:
- Research article on CRM practices in jewellery industry.
- Market report on jewellery store management software. Credence Research Inc.
- Case study of jewellery retailer CRM implementation. SugarCRM Inc.+1