Project Design Phase

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Team Size : 4

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Proposed Solution

Proposed Solution 1. Solution Overview

Describe the main objective, e.g., "To provide a unified platform for jewelry retailers to manage inventory, sales processes, customer relationships, and reporting in a secure, user-friendly environment."

2. Core Modules & Features

- Inventory Management
- Automated tracking of all jewelry items (gold, silver, diamonds, precious stones)
- Real-time stock updates after each transaction
- Alerts for low-stock, high-value items, and stock mismatches
- Categorization by type, weight, purity, and design attributes

3. Customer Relationship Management (CRM)

- Centralized customer profiles (contact details, preferences, purchase history)
- Customizable forms for new customer entry and profiling
- Sales pipeline tracking (lead, prospect, engaged, closed)
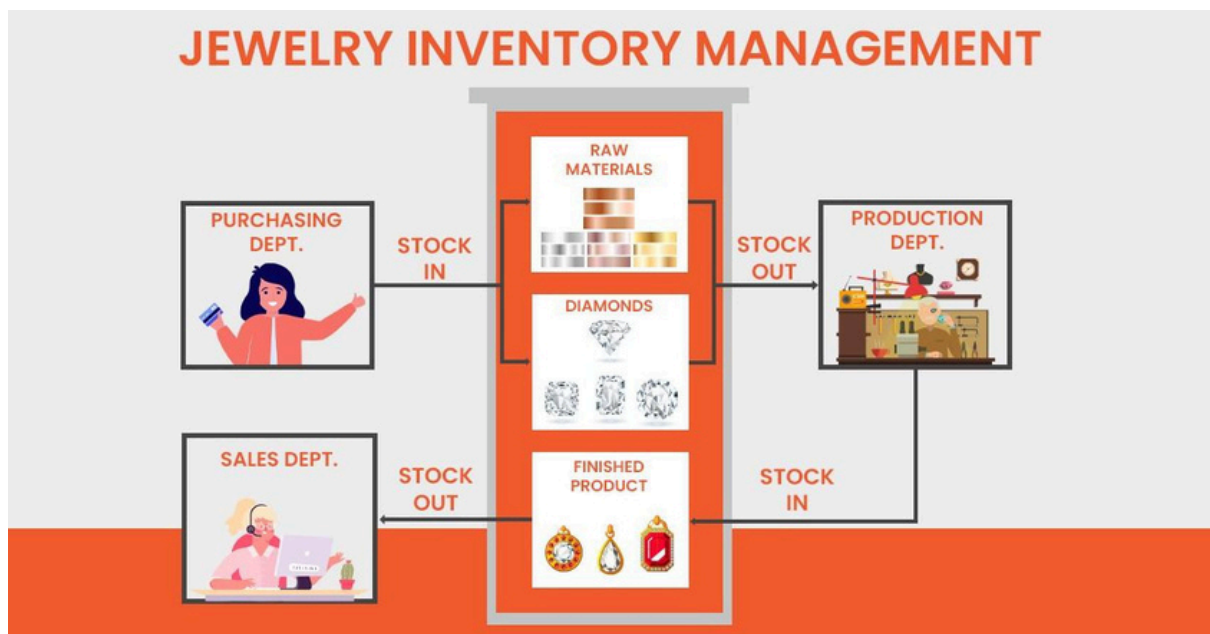- Integration with communication tools (email, SMS)

4. Sales & Order Handling

- Create and manage orders and invoices for standard sales, custom orders, repairs

Inventory Management System	A module to maintain jewellery stock, track sold and available items, and autoupdate inventory levels.	High	Improved accuracy and reduced stock shortages.
Automated Billing System	Generates digital invoices instantly after each transaction with integrated tax and discount options.	High	Speeds up billing and ensures accurate financial tracking.
Customer Relationship Module	Stores customer data, purchase history, and preferences to personalize offers and services.	High	Builds loyalty and improves customer satisfaction.
Sales & Analytics Dashboard	Provides visual analytics for revenue, topselling items, and monthly performance reports.	Medium	Enhances decision-making and business strategy.
Supplier Management System	Tracks supplier details, purchase orders, and restock timelines for better coordination.	Medium	Improves procurement efficiency.

Automated Notification System	Sends alerts for order readiness, payment reminders, and promotional offers via email/SMS.	Medium	Boosts communication and repeat sales.
Security and Access Control	Implements rolebased access for staff to prevent unauthorized data handling.	High	Ensures data security and accountability.
Feedback and Rating System	Collects customer feedback postpurchase to monitor service quality and satisfaction.	Medium	Supports continuous improvement.

Template

Reference :

https://developer.salesforce.com/signup