

SOLUTION REQUIREMENT

Date	31 OCTOBER 2025
Team ID	NM2025TMID04251
Project Name	CRM Application for Jewel Management-(Developer) in Salesforce
Maximum Marks	4 Marks

Solution Requirement

The **CRM Application for Jewel Management** is designed to modernize and automate jewelry business operations. The system manages customers, items, prices, and billing using Salesforce CRM to ensure data accuracy, automation, and analytical insights.

The solution requirements are categorized into **Functional Requirements** and **Non-Functional Requirements** to define the system's capabilities and quality attributes.

1. Functional Requirements:

S.No	Requirement Name	Description
1.	Customer Management	The system should allow creation, editing, and retrieval of customer profiles with contact information, address, and purchase history.
2.	Jewelry Item Management	Enables adding new jewelry items with attributes such as name, metal type, purity, weight, and price reference.
3.	Price Management	Allows price updates based on gold/silver rate fluctuations, automatically reflecting in related records.
4.	Billing Automation	Generates bills automatically by linking customer, item, and price data through record-triggered flows.
5.	Report & Dashboard Generation	Provides real-time analytics and dashboards showing total sales, customer activity, and business trends.
6.	User Role	Admin can assign profiles (Admin, Staff, Manager)

S.No	Requirement Name	Description
	Management	with specific permissions for controlled access.
7.	Security & Data Validation	Implements field validations, role hierarchies, and permission sets to ensure data integrity.
8.	Data Relationship Maintenance	Maintains lookup relationships between customer, item, price, and billing objects for seamless data flow.
9.	Notification & Alerts	Sends automated alerts for price changes, billing confirmations, or customer transactions.
10.	Scalability & Customization	Supports future integration of modules like supplier management and loyalty tracking.

2. Non-Functional Requirements:

S.No	Requirement Name	Description
1.	Performance	The system must provide quick response times (<3 seconds) for major operations like record creation or billing.
2.	Scalability	Designed to handle increased data volumes (customers, items, and transactions) without performance degradation.
3.	Availability	Hosted on Salesforce Cloud with 99.9% uptime for continuous business operation.
4.	Security	Data is protected using role-based access, encryption, and field-level security.
5.	Maintainability	Configuration-based design allows easy updates without code modifications.
6.	Usability	Provides an intuitive Lightning-based interface for users with minimal training.
7.	Portability	Accessible across web and mobile platforms through Salesforce's responsive UI.
8.	Reliability	Ensures consistent execution of automation flows and data integrity during transactions.
9.	Data Backup	Cloud-based backup ensures data recovery and protection against accidental loss.
10.	Compliance	Adheres to Salesforce security standards and business compliance policies.

3. Design Constraints :

- The solution is developed using **Salesforce Lightning Platform** with a **low-code approach**.
- External integrations are limited to REST APIs for optional features.
- All data objects and flows must conform to Salesforce governor limits and schema relationships.

4. Solution Justification:

This solution simplifies jewelry business management by combining customer tracking, pricing automation, billing generation, and analytics into a unified platform. It replaces manual, error-prone operations with smart automation, ensuring accuracy, faster transactions, and improved decision-making.

With its modular and scalable design, the system meets current business needs while allowing future expansion into e-commerce, supplier management, and AI-based sales prediction.