

Ideation Phase

Brainstorm & Idea Prioritization

Date: 30 October 2025

Team ID: NM2025TMID04224

Project Name: CRM Application for Jewel Management

Maximum Marks: 4 Marks

CRM Application for Jewel Management Template

This guided project demonstrates how to develop a Salesforce-based CRM application to efficiently manage and track jewelry-related business operations. It focuses on managing customers, items, pricing, customer orders, and billing in a streamlined and automated way. The application aims to improve business workflows, reduce manual errors, and enhance customer satisfaction.

The workflow begins by setting up records for Jewel Customers, Prices, Items, Customer Orders, and Billings. Each module is connected through lookups to ensure seamless integration. Automation is achieved using Record-Triggered Flows, formula fields, and validation rules to maintain data accuracy.

A Salesforce dashboard and reports are created for real-time insights into sales performance, customer orders, and revenue trends, empowering business owners to make informed decisions.

Step-1: Team Gathering, Collaboration and Problem Selection

The team collaborated to identify challenges in jewelry business management. After discussions, the problem of inefficient manual tracking of customer orders and billing was selected. Manual operations often lead to order mismatches, billing delays, and lack of proper tracking. By addressing this through Salesforce automation, the project ensures faster processing, accurate records, and better customer experience.

Step-2: Brainstorming, Idea Listing, and Grouping

Brainstorm: Team members shared ideas on order management, item tracking, billing automation, and dashboard analytics.

Idea Listing: Ideas included customer record automation, billing summary reports, and daily revenue dashboards.

Grouping: Ideas were categorized under 'Automation', 'Monitoring', and 'Customer Relationship' for development focus.

Action Planning: Tasks were distributed for creating Salesforce objects, defining relationships, setting up validation rules, and report dashboards.

Step-3: Idea Prioritization

Idea prioritization helped focus on key CRM features that enhance jewelry management efficiency. The top priorities included: Automated Billing and Order Tracking Real-time Sales Dashboard Customer Relationship Management Price Management and Revenue Reports By focusing on these features, the CRM Application ensures efficient operations, customer satisfaction, and improved decision-making for jewelry businesses.