[Proposal]

Database Initialization and Management: Inventory Tracking, Sales and Reports – For Equinox Distributors

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Administrative Synopsis

The business model that has been established is lacking organization (physically and digitally). There are no forms/records and very little information tracking is performed. There are several hundred customers nationally, but how many are active? Which products need reordering? What is the overall monthly profit? Such questions cannot be answered easily without tracking data from orders, sales, customer information and product inventory.

There is always an opportunity to gather more valuable information from every sale. The majority of initial revenue is generated through point of sale at gem and mineral shows – fortunately, much contact information has already been acquired to keep many customers active. Data can be collected from customer contact information, recent orders as well as inventory to generate many beneficial reports such as sales trends, demographics, active customers, items/products, etc. Such reports can be utilized to send promo codes to inactive customers, determine which product(s) have the greatest profit margin, inventory tracking for automatic inventory reorder reminders, the possibilities are endless.

Introduction

There are several problems with the current configuration that renders the company less efficient to be able to self-sustain and/or maintain steady growth. A large portion of income is originated from transactions with "random" customers and contact information is generally not collected as normal convention. Coupons/promo codes and newsletters are a great way to retrieve relevant contact information for repeat business, but also to identify sales trends. Much of the raw material is stored in bins and the quality faceted pieces are kept in cases; all items are stored without weighing the inventory. Being unaware of the availability and/or amount of an item in stock can affect the possibility of a purchase. An all fronts approach is needed to make improvements with data collecting; physical practices, database design and website/network synchronization.

An Entity Relationship Diagram will be completed to visually display the associations between orders, products, customers and suppliers. This framework will be the foundation to build the database and collect more information and create various reports such as:

- *Identify active and inactive customers*
- *Sales/product trends*
- *Profit variance*
- *Demographics (regional, age, sex, date, etc.)*
- *Inventory*
- *Promo code/coupon usage*
- *Specifics (orders, sort by price, customers, procurement sources, products, etc.)*

Simple solutions can be effortlessly achieved with potential business growth.

Entity Relationship Diagram

Orders Table:

    ItemID

    Description

    Quantity

    Price

    Date

    CustomerID

Customers table:

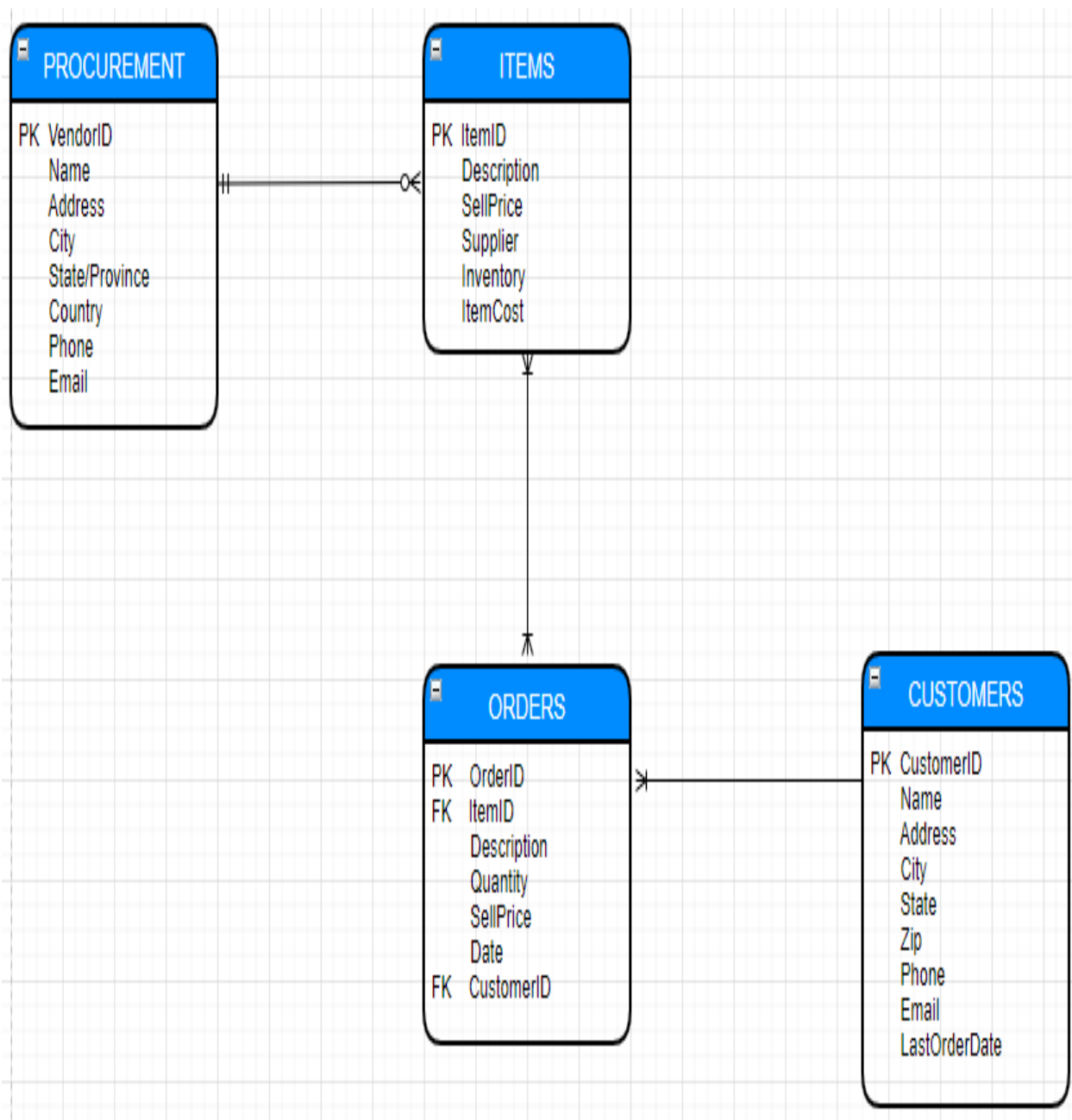   CustomerID

    Name

    Address

    City

    State

    Zip

    Phone

    Email

    LastOrderDate

Items table:

    itemID

    Description

    SellPrice

    Supplier

    Inventory

    ItemCost

Procurement table:

    Name

    Address

    City

    State/Province

    Country

    Phone

    Email

PROCUREMENT

PK	VendorID
	Name
	Address
	City
	State/Province
	Country
	Phone
	Email

ITEMS

PK	ItemID
	Description
	SellPrice
	Supplier
	Inventory
	ItemCost

ORDERS

PK	OrderID
FK	ItemID
	Description
	Quantity
	SellPrice
	Date
FK	CustomerID

CUSTOMERS

PK	CustomerID
	Name
	Address
	City
	State
	Zip
	Phone
	Email
	LastOrderDate

Disclaimer: A general overview – many corrections/improvements will be implemented.

Many visual screens will need to be created to instruct customers as well as anyone trying to access the database in the future - order form, menu, login, list of reports, etc.).

Example of an order form

ORDER

Last Name   First Name

Address

City   State (XX)

Zip Code   Item #

                                       Quantity

Example of a REPORTS menu screen.

REPORTS

Demographics → CLICK

Inventory → CLICK

Profit → CLICK

Trends → CLICK

Customer Activity → CLICK

Specific Field(s) → CLICK

Conclusion

Implementing the proposed design will manifest a multitude of opportunities; create various reports for analyzing to increase sales and/or profit margin, identify any issues and/or improvements that may need to be undertaken along the supply chain (supplier to customer), keep customers active with promo codes/birthday coupons and possibly a simple digital newsletter as well to target narrowed demographics (items – locations), such as focusing more on promoting specific items in a particular geographic region at the gem shows. Moments after each transaction is executed, all pertinent data will be updated in the system. The more information that is gathered exponentiates the possibilities of what the data can be utilized for. "Knowledge is power…" (Sir Francis Bacon)