TwentyOne Gold Jewelry Establishment
ERP Software System Requirements Report

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1. Introduction

As TwentyOne Gold, a high-end jewelry establishment, we are seeking to implement a comprehensive ERP (Enterprise Resource Planning) system to streamline and optimize our operations. The system should cover all areas of the business, including inventory, production, sales, customer management, and finance. Our goal is to reduce inefficiencies, improve customer experience, and scale the business smoothly.

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2. Inventory & Material Management

User Requirements:

- **Real-time Inventory Tracking**: Track raw materials (gold, gems) and finished products in real-time across all locations.
- **Bill of Materials (BOM)**: Manage material requirements for each jewelry item, including cost breakdowns.

System Requirements:

- **Real-time Inventory System**: The ERP system should include an inventory management module capable of tracking raw materials and finished products in real-time across all physical and virtual locations.
- **BOM Management**: The system should support a detailed BOM that includes the materials used, cost per unit, and quantities required for each item of jewelry.
- **Material Usage Tracking**: The system must be able to track the amount of materials used in production and alert users if material levels are running low.

3. Production Management

User Requirements:

- **Work Order Management**: Create and track work orders detailing materials, stages (design, casting, polishing), and deadlines.
- **Production Scheduling**: Assign tasks based on artisans' skills and availability to optimize production flow.
- **Custom Order Handling**: Manage and track custom orders, including designs, materials, and customer preferences.
- **Quality Control (QC)**: Implement quality checks at key production stages to ensure product quality.
- **Defects & Rework Management**: Track defective items and manage rework processes for quality assurance.

System Requirements:

- **Work Order Module**: The ERP should include functionality to create, assign, and track work orders across different stages of the production process.
- **Scheduling & Resource Allocation**: The system should allow for scheduling production tasks based on artisan skills and availability, optimizing resources and minimizing delays.
- **Custom Order Tracking**: The ERP system should allow for tracking custom orders, from the initial customer request to the final product delivery, with detailed specifications.
- **QC Management**: The ERP system should support quality control checklists and logs at key stages in the production process and generate alerts for items that do not meet quality standards.
- **Defect Tracking & Rework Management**: The system should have features for tracking defects in products, categorizing them by type, and managing the rework process, including feedback to artisans.

4. Sales & Customer Management

User Requirements:

- **Multi-channel Sales Integration**: Integrate sales from both physical stores and e-commerce platforms for unified sales tracking.
- **Customer Profiles**: Maintain customer profiles, including preferences and purchase history for personalized service.
- **Order Tracking**: Enable customers to track orders (both custom and pre-made jewelry) for transparency and customer satisfaction.

System Requirements:

- **Sales Channel Integration**: The ERP system should be able to integrate sales data from both brick-and-mortar stores and online platforms, offering a unified view of sales activity and inventory.
- **Customer Relationship Management (CRM)**: The ERP system should include CRM functionality that maintains customer profiles, tracks purchase history, and records customer preferences for future interactions.
- **Order Tracking System**: The system should allow customers to track the status of their orders, providing updates on shipping and expected delivery times.

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5. Financial & Accounting Management

User Requirements:

- **Expense Tracking**: Track costs for materials, labor, and overheads to generate financial reports like P&L and cash flow.
- **Profitability Analysis**: Analyze profitability for individual jewelry items to assist with pricing and cost control.
- **Tax & Compliance Reporting**: Generate reports to ensure compliance with local tax regulations.

System Requirements:

- **Financial Management Module**: The ERP system should include an integrated financial management module to track expenses, generate P&L reports, cash flow statements, and other financial reports.
- **Profitability Analytics**: The system should provide detailed profitability analysis by product, allowing for cost optimization and price adjustments.
- **Tax Compliance**: The system should be capable of generating tax reports in compliance with local tax laws, providing necessary documentation for tax filing.

6. Resource & Labor Management

User Requirements:

- **Workforce Management**: Assign tasks based on skill sets and availability, while tracking labor costs.
- **Machine Utilization & Maintenance**: Monitor machine usage and schedule maintenance to minimize downtime.

System Requirements:

- **Workforce Scheduling**: The ERP system should provide workforce scheduling capabilities to assign tasks based on skill sets, availability, and labor costs.
- **Machine Management**: The system should be able to track machine usage, log maintenance activities, and send alerts for upcoming or overdue maintenance tasks.

7. Custom Dashboards

User Requirements:

- **Customizable Dashboards**: Provide customizable dashboards with KPIs on sales, production, and customer satisfaction.

System Requirements:

- **Dashboard Configuration**: The system should allow users to create and customize dashboards to display key performance indicators (KPIs) relevant to sales, production, and customer satisfaction. Dashboards should be accessible to various roles (e.g., managers, staff) with role-based permissions.

8. Customer Experience & Order Fulfillment

User Requirements:

- **Order Fulfillment Tracking**: Enable customers to track the status of their orders to ensure timely delivery.
- **Loyalty Programs**: Integrate loyalty programs and promotions to increase repeat purchases.

System Requirements:

- **Order Tracking System**: The ERP system should allow for real-time order tracking, enabling customers to view the status of their orders from creation to delivery.
- **Loyalty Program Integration**: The system should support the creation, management, and tracking of customer loyalty programs, including reward points, discounts, and promotions.