CRM Application for Jewel Management (Developer Document)

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1. Introduction

This document outlines the development requirements, features, modules, and technical specifications for a CRM (Customer Relationship Management) application tailored for jewel management businesses. The CRM system aims to help jewelry retailers manage inventory, customers, orders, sales, suppliers, and communication efficiently.

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2. Objectives

To centralize and automate jewelry store operations

To manage customer data, sales records, and inventory

To enable seamless communication between staff and customers

To support decision-making through reporting and analytics

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3. Key Features

Customer Management: Add, edit, delete customer profiles, track purchase history, preferences, and birthdays.

Inventory Management: Manage stock, categorize jewelry by type (gold, diamond, silver), track product movements, and set alerts for low stock.

Sales and Billing: Create invoices, manage discounts, GST calculations, and issue receipts.

Order Tracking: Status updates for custom and repair orders with estimated delivery dates.

Supplier Management: Manage supplier details, order history, and payment dues.

Notifications: Send SMS/Email reminders for orders, payments, birthdays, and promotions.

Reports & Analytics: Daily sales reports, inventory reports, customer insights.

User Roles and Access Control: Admin, Manager, Sales Staff roles with specific permissions.

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4. Technical Stack

Frontend: React.js / Angular

Backend: Node.js / Django / Laravel

Database: MySQL / MongoDB

Authentication: JWT / OAuth 2.0

Hosting: AWS / Firebase / DigitalOcean

SMS/Email API: Twilio / SendGrid

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5. Modules

1. Dashboard

Overview of sales, inventory, and customer activity

2. Customers

Add/view/edit customers

Purchase history and follow-ups

3. Inventory

Add/view/edit/delete items

Categories, tags, and barcodes

4. Sales

New sale entries

Apply discounts/taxes

Generate invoice/receipt

5. Orders

Track order status

Notify customers on update

6. Suppliers

Manage purchase orders

Supplier profiles

7. Reports

Filter by date, item, customer

Export in Excel/PDF format

8. Settings

User roles and permissions

GST, invoice templates, etc.

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6. Developer Guidelines

Follow MVC architecture

Ensure responsive UI for desktop and mobile

Use version control (Git)

Implement proper validation and error handling

Secure sensitive data (e.g., using HTTPS, encryption)

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7. Deployment & Maintenance

Initial deployment via CI/CD pipeline

Regular updates for bug fixes and new features

Automated backups and monitoring

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8. Future Enhancements

Mobile app integration

Loyalty points and rewards module

AI-based recommendation system

Multi-store support

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9. Conclusion

This CRM application is designed to streamline jewelry business processes, enhance customer experience, and provide insightful data for growth. Developers are expected to maintain code quality, ensure usability, and support scalability.