

# FOR OPTICS STORES MANAGEMENT SYSTEM

## FULL FUNCTIONAL REQUIREMENTS DOCUMENT

(CRM, Inventory, Financial Accounting, KPI and Analytics)

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### 1. GENERAL INFORMATION ABOUT THE PROJECT

This document defines the functional requirements for a management system to be developed for the full digitalization of optical stores. This system aims to integrate the main processes encountered in the optical business into a single platform.

The system provides full control over client management, product and inventory control, sales, financial calculations, employee KPIs, and branch operations.

Once this document is approved by the customer, the project will be implemented based on these requirements.

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### 2. MAIN OBJECTIVES OF THE SYSTEM

The system is designed to achieve the following goals:

- Centralize and systematically maintain client information
  - Real-time monitoring of products and inventory
  - Make sales and financial processes transparent
  - Assess employee performance through KPIs
  - Monitor branch activities on a single dashboard
  - Provide accurate business statistics and analytical data
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### **3. CUSTOMER DATABASE (CRM MODULE)**

The system creates a single, centralized database for all clients. A separate profile is created for each client, which stores the following information: full name, contact number, date of birth, additional comments, and visit history.

In accordance with the optics activity, the client's eye parameters (SPH, CYL, AXIS, PD for the right and left eyes) are stored separately. This information is stored in the form of history and can be used in subsequent visits.

The system stores all of a client's purchases and automatically calculates their total spending. There are options for searching, filtering, and sorting by client.

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### **4. PRODUCT AND INVENTORY MANAGEMENT**

The system maintains a single catalog of all products. Products are divided into categories (frames, lenses, accessories, services). A separate card is created for each product.

The product card displays the product name, brand, model, purchase price, sale price, supplier, date of arrival, and condition.

Inventory is maintained separately for each branch. The balance is automatically updated when products are sold, returned, or moved to another branch.

The system allows you to identify products that are in short supply, products that have not been sold for a long time, and goods that are selling quickly.

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### **5. INCOME AND EXPENDITURE ACCOUNT**

The system fully records all incoming and outgoing transactions. The processes of purchasing, returning, transferring products between branches, and issuing defective products are managed through the system.

Each transaction clearly shows who made it, when, at which branch, and for which product. This information is then used for audits and inspections.

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### **6. SALES MODULE**

The sales process is carried out through the system. It is possible to combine several products in one sale. The sale defines the client, products sold, prices, discounts and payment type.

Once the sale is confirmed, the products are automatically deducted from inventory and the financials are updated. In case of returns, the system automatically recalculates inventory and financials.

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## 7. BRANCHES MANAGEMENT

The system allows you to work with multiple branches. Each branch maintains its own inventory, sales, employees, and financial indicators separately.

Managers will be able to see and compare all branches in a single dashboard.

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## 8. EMPLOYEES AND KPI CALCULATION

The system maintains a list of all employees. For each employee, their position, monthly salary, and percentage of sales are determined.

The system automatically calculates employees' sales and generates their KPI indicators. At the end of the month, the total salary and bonuses of employees are calculated.

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## 9. EXPENSE ACCOUNT

All expenses related to the operation of the optician are recorded separately in the system. Reports are generated on rent, utility bills, advertising, salaries and other expenses.

Profit and loss are automatically calculated based on this data.

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## 10. STATISTICS AND ANALYTICS

The system provides a visual statistical dashboard for management, which displays sales dynamics, best-selling products, least-selling products, most productive employees, and branch indicators.

Reports are generated on a daily, weekly, and monthly basis.

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## 11. USER ROLES AND SECURITY

User roles are implemented in the system. For each role, the permissions in the system are clearly defined. This ensures data security and prevents unauthorized changes.

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## 12. BOUNDARIES AND AGREEMENTS

Functions not specified in this document are not included in the scope of the project and will only be implemented by separate agreement. This document is the primary source for determining the scope of the project.

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## 13. FINAL RESULT

As a result of the implementation of this system, all processes in optical stores will be streamlined, financial and operational control will be strengthened, and management efficiency will increase significantly.