

# Multi-Branch Jewellery Commerce Functional Controls

## Executive Summary

This document outlines the functional scope for implementing a professional, enterprise-grade multi-branch commerce platform designed to support high-value jewellery retail operations.

The platform is expected to operate as a single, unified commerce system supporting multiple physical branches while maintaining centralized control over products, pricing, inventory, orders, customers, and compliance applicable for a single region.

The functional structure has been deliberately organized into clear operational modules to ensure ease of use for business teams, clean separation of responsibilities, and accurate scope estimation by vendors.

## Key Objectives

The proposed platform must:

- Support centralized catalogue and pricing management
- Enable branch-level inventory, fulfilment, and dispatch
- Handle end-to-end order processing, including invoicing, shipping, click-and-collect, and returns
- Provide real-time business visibility through dashboards and reports
- Ensure secure, role-based access across head office and branch teams
- Be scalable to support future expansion and omnichannel models

## Functional Coverage

The functional menu structure covers all critical business areas, including:

- Executive and branch-level dashboards
- Order management, invoicing, shipping, and returns
- Product catalogue, pricing, and attribute management
- Multi-branch inventory and stock allocation
- Customer management and CRM
- Marketing, promotions, and content management
- Payments, taxation, and statutory compliance
- Reporting and analytics
- Integrations with payment gateways, logistics, POS, and ERP systems
- User access control, audit logs, and system administration

## Design Principles

The functional structure has been designed to:

- Be platform-agnostic, allowing vendors to propose open source or equivalent commerce engines
- Clearly separate day-to-day operations from system configuration
- Support branch autonomy without compromising central governance
- Minimize operational risk in high-value transactions
- Enable clean effort estimation and accountability
- Implement the functional modules with role-based access control
- Ensure branch-level data segregation wherever applicable
- Clearly identify any assumptions, dependencies, or exclusions

## Functional Menu Structure

The functional scope detailed below intends to establish a strong, business-first foundation for a multi-branch commerce platform that is reliable, scalable, and operationally efficient. It is intended to enable the developers to create a well-architected solution that aligns with real-world retail operations and long-term business growth.

### 1. Dashboard & Insights: At-a-glance business visibility

- Executive Dashboard
  - Sales Summary
  - Orders by Branch
  - Inventory Health
  - Top Products
  - Alerts & Exceptions
- Branch Dashboards
  - Branch Sales
  - Pending Orders
  - Dispatch Status

### 2. Orders & Fulfilment: End-to-end order processing and shipping

- Order Management
  - View All Orders
  - Order Details

- Order Status Tracking
- Manual Order Creation (In-store / Assisted Sales)
- Invoicing
  - Generate Invoice
  - View Invoices
  - Payment Confirmation
- Shipping & Dispatch
  - Create Shipment
  - Partial / Full Shipment
  - Courier Assignment
  - Tracking Number Management
- Click & Collect
  - Ready for Pickup
  - Picked-Up Orders
- Returns & Refunds
  - Return Requests (RMA)
  - Reverse Pickup
  - Credit Notes

### 3. Products & Catalogue: Product, pricing, and content control

- Product Management
  - All Products
  - Add / Edit Products
  - Product Variants (Size, Weight, Purity)
  - Images & Media
- Categories
  - Category Tree
  - Category Display Rules
- Attributes & Specifications
  - Metal Type & Purity
  - Stone Details
  - Making Charges
  - Certifications
- Pricing & Gold Rate

- Base Price Rules
- Making Charge Rules
- Branch-specific Overrides

#### **4. Inventory & Branch Management:** Multi-branch stock accuracy and control

- Branch / Store Locations
  - Branch Setup
  - Fulfilment Capabilities
- Inventory Sources
  - Branch Inventory
  - Central Warehouse
  - Stock Transfers
- Stock Operations
  - Stock In / Out
  - Low Stock Alerts
- Allocation Rules
  - Branch Fulfilment Priority
  - Nearest Store Logic

#### **5. Customers & CRM:** Customer data and relationship management

- Customer Directory
  - Customer Profiles
  - Order History
- Customer Groups
  - Retail Customers
  - Loyalty Customers
- Loyalty & Engagement
  - Loyalty Points
  - Coupons & Offers
- Support
  - Customer Queries
  - Order Assistance

#### **6. Marketing & Promotions:** Demand generation and retention

- Promotions
  - Cart Discounts
  - Product Offers
  - Festival Campaigns
- Content & SEO
  - URL Management
  - Search Terms
  - Metadata
- Reviews & Ratings
  - Moderate Reviews
  - Approvals
- Notifications
  - Email Templates
  - SMS Templates
  - WhatsApp Templates

## 7. CMS & Storefront: Brand presentation and content control

- Pages
  - Static Pages (About, Policies)
- Banners & Widgets
  - Hero/ Homepage Banners
  - Innerpage Banners
  - Promotional Widgets
- Media Library
  - Images
  - Videos
- Theme & Layout
  - Basic Theme Configurations
  - Layout Management
  - Storefront Configuration
  - Branch-specific Branding

## 8. Payments, Tax & Compliance: Financial and regulatory compliance

- Payment Methods

- Online Payments
- In-store Payments
- Tax Configuration
  - Tax Rules
  - State-wise Tax Setup
- Financial Documents
  - Invoices
  - Credit Notes
  - Reports

## 9. Reports & Analytics: Decision support and performance analysis

- Sales Reports
  - Daily / Monthly Sales
  - Branch-wise Performance
- Inventory Reports
  - Stock Ageing
  - Slow / Fast Movers
- Customer Reports
  - Repeat Customers
  - Customer Lifetime Value
- Operational Reports
  - Order Turnaround Time
  - Fulfilment Efficiency

## 10. Integrations & Automation: External system connectivity

- Payment Gateway Integrations
- Courier & Logistics Integrations
- ERP / POS Integration
- Webhooks & APIs

## 11. User & Access Management: Security and governance

- User Accounts
  - Admin
  - Branch Manager

- Sales Executive
- Process Executives
- Inventory Staff
- Roles & Permissions
  - Menu-level Access Control
- Audit Logs
  - User Activity
  - Data Changes

## 12. System & Configuration: Platform administration

- Store & Branch Configuration
- Master Data
  - Address Components
  - Payment Gateway Config
  - Shipping Charges
  - Customs Settings
  - Order Branch Mapping
- Notifications & Email Settings
- Cache & Performance
- Data Import / Export
- Backup & Maintenance

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