Project: CRM application for jewel management — Ideation Phase

1. Purpose / Vision

Create a CRM system tailored for jewelry businesses to efficiently manage:

Customer relationships and purchase history

Jewelry inventory and orders

Sales tracking and follow-ups

Custom orders and repair requests

Business insights (reports & dashboards)

2. Target Users

Store Owners / Managers – oversee sales, inventory, reports.

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Sales Executives / Agents – manage customers, record purchases, follow-ups.

Jewelry Designers / Artisans – manage custom design requests and progress.

Customers (optional portal) – view purchase history, request repairs, or place orders.

3. Core Features (MVP Scope)

Customer Management

Add / edit / delete customers

Track communication history

Record preferences (metal type, stone type, price range)

Customer segmentation (VIP, Regular, New)

Jewelry Inventory

Add jewelry items (SKU, type, metal, weight, price)

Manage stock (availability, sold items, reorder alerts)

Track custom jewelry requests and status

Sales & Orders

Create and manage invoices and quotations

Record payments and due balances

Track sales performance (daily, monthly, by staff)

Reports & Dashboards

Sales reports by date, product type, or salesperson

Inventory reports (low stock, high-selling items)

Customer insights (top buyers, frequent items)

Automation & Workflows

Automated reminders for customer birthdays/anniversaries

Notifications for payment due dates or follow-ups

Custom approval processes for high-value orders

4 . Advanced Features (Future Enhancements)

AI Recommendations: Suggest products based on customer history

WhatsApp/SMS Integration: Send invoices, offers, or reminders

Repair & Custom Order Tracker: Stage-based workflow tracking

AR Try-On Integration: Virtual jewelry preview (long-term vision)

Loyalty Program: Reward points and discounts for repeat buyers

5. Data Model (High-Level Schema)

Object / Entity Key Fields Relationships

Customer Name, Phone, Email, Preferences 1→Many with Orders

Jewelry Item SKU, Type, Material, Price, Stock 1→Many with Order Items

Order Order ID, Date, Customer, Total, Status Many→1 Customer, Many→Many Jewelry

Order Item Quantity, PriceMany→1 Jewelry

Payment Payment ID, Mode, Date, Amount 1→1 Order

Repair Request Request ID, Item, Issue, Status Many→1 Customer

6. Tech Stack Options

Depending on your goal:

Platform Stack Notes

Salesforce CRM Custom App Lightning App Builder, Apex, LWC, Flows Best if you want scalability and CRM built-in

Web App (Custom Build) React / Angular + Node.js + MongoDB Best for custom design freedom

Mobile-first CRM Flutter / React Native + Firebase Ideal for sales agents on the go

7. Security & Access

Role-based access: Admin, Sales, Designer, Customer

Field-level security (hide prices from certain users)

Audit trails for record edits and deletes

8. Reports / Dashboards Examples

Daily sales summary

Top 10 selling jewelry items

Revenue by category (gold, diamond, platinum)

Customer acquisition trends

9. Integration Ideas

Accounting Systems (Tally, QuickBooks)

E-commerce Store (Shopify, WooCommerce sync)

Email / SMS Gateways (Twilio, SendGrid)

Calendar Integration (Google Calendar reminders)

10. Next Steps

1. Finalize key use cases (User Stories)

2. Create low-fidelity wireframes (Customer page, Inventory page, Sales page)

3. Define your data schema in detail

4. Choose your platform (Salesforce / Custom Web App)

5. Build MVP → Test with a small jewelry business