

Project Design Phase

Functional Requirements

Date	01 NOV 2025
Team ID	NM2025TMID04631
Title	CRM Application For Jewel Customer
Maximum Marks	10 Marks

1. Overview

The CRM application for jewel management is designed to **streamline jewellery business operations** by managing customer relationships, tracking orders, maintaining inventory, handling billing, and facilitating effective communication between customers and sales teams.

The following **functional requirements** define the system's core operations, user interactions, and expected outputs.

2. Functional Requirements by Module

A. Customer Management Module

Requirement ID	Functional Requirement Description
CM-01	The system shall allow users to create, view, edit, and delete customer records.
CM-02	The system shall store customer details such as name, contact number, email, city, and preferences.
CM-03	The system shall maintain purchase history for each customer.
CM-04	The system shall enable searching and filtering of customers by name, city, or loyalty tier.
CM-05	The system shall allow tagging of VIP customers for personalized offers.

Requirement ID	Functional Requirement Description
CM-06	The system shall send automatic greetings or offers on birthdays and anniversaries.

B. Order Management Module

Requirement ID	Functional Requirement Description
OM-01	The system shall allow users to create, modify, and delete customer orders.
OM-02	The system shall support both standard and customized jewelry orders.
OM-03	The system shall track the order status (e.g., Processing, Ready, Delivered).
OM-04	The system shall send notifications to customers about order progress.
OM-05	The system shall link each order to its corresponding customer profile.
OM-06	The system shall calculate expected delivery dates and alert if overdue.

C. Billing & Payment Module

Requirement ID	Functional Requirement Description
BP-01	The system shall generate invoices automatically for each completed order.

Requirement ID	Functional Requirement Description
BP-02	The system shall calculate total costs, taxes, and applicable discounts.
BP-03	The system shall record payment methods (cash, card, UPI, online).
BP-04	The system shall update payment status (Pending, Paid, Partially Paid).
BP-05	The system shall send payment reminders for pending invoices.
BP-06	The system shall allow downloading and emailing of digital bills.

D. Inventory Management Module

Requirement ID	Functional Requirement Description
IM-01	The system shall store inventory details including item ID, type (Gold, Silver, Diamond, etc.), weight, and price.
IM-02	The system shall automatically update stock levels after each sale.
IM-03	The system shall alert the manager when stock reaches below a defined threshold.
IM-04	The system shall track item returns or exchanges.
IM-05	The system shall generate inventory reports (daily, weekly, monthly).

E. Communication & Notification Module

Requirement ID	Functional Requirement Description
CN-01	The system shall send automated notifications (SMS, email, app) for follow-ups, order status, and offers.
CN-02	The system shall allow staff to manually send messages to selected customers.
CN-03	The system shall maintain a log of all messages and communications.
CN-04	The system shall allow scheduling of marketing campaigns.

F. Reporting & Analytics Module

Requirement ID	Functional Requirement Description
RA-01	The system shall generate sales reports by day, week, month, and year.
RA-02	The system shall display customer trends and most-purchased items.
RA-03	The system shall provide inventory valuation and turnover reports.
RA-04	The system shall visualize data through charts and dashboards.
RA-05	The system shall export reports in PDF and Excel formats.

G. Feedback & Review Module

Requirement ID	Functional Requirement Description
FR-01	The system shall collect customer feedback after purchase or service completion.
FR-02	The system shall allow staff to view and respond to customer feedback.
FR-03	The system shall generate reports on customer satisfaction ratings.

H. User Management & Security

Requirement ID	Functional Requirement Description
US-01	The system shall provide role-based access control (Admin, Manager, Sales, Inventory).
US-02	The system shall require secure login with username and password.
US-03	The system shall log all user activities for auditing purposes.
US-04	The system shall allow admins to create, edit, or deactivate user accounts.
US-05	The system shall ensure all sensitive data is encrypted in storage and transmission.

3. System-Level Functionalities

1. The CRM shall be accessible via both **web** and **mobile interfaces**.
2. The system shall provide a **dashboard** summarizing key metrics (sales, stock, top customers).

3. The CRM shall support **multi-user concurrent access** with proper data isolation.
 4. The system shall allow **data backup and recovery**.
 5. The system shall integrate with **email/SMS APIs** and **payment gateways**.
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4. Expected Outcomes

- Centralized and organized customer management.
- Improved order accuracy and faster processing.
- Automated communication and follow-ups.
- Enhanced decision-making with analytics.
- Secure and reliable handling of business data.