

## 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.

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## 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
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CM-06	The system shall send automatic greetings or offers on birthdays and anniversaries.
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## B. Order Management Module

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

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

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#### **D. Inventory Management Module**

<b>Requirement ID</b>	<b>Functional Requirement Description</b>
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).

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#### **E. Communication & Notification Module**

<b>Requirement ID</b>	<b>Functional Requirement Description</b>
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.

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## **F. Reporting & Analytics Module**

<b>Requirement ID</b>	<b>Functional Requirement Description</b>
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.

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## **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.

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## 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.

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## 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.